



UAccess ANALYTICS

Working with Dashboards: Creating a Dashboard Prompt

COPYRIGHT & TRADEMARKS

Copyright © 2013, Arizona Board of Regents

Record of Changes		
Date	Version #	Description
11/13/2013	1.00	Original

Table of Contents

<i>About this Booklet</i>	iv
<i>Access to Analytics Data</i>	iv
<i>UAccess Community</i>	iv
Prerequisites	1
Overview	1
Premise	1
You've Already Created Your Analysis	1
What is a Dashboard Prompt?	3
Edit the Analysis to Function with a Prompt	3
Edit the Term Description Filter.....	4
Edit the Enrollment Add Day Date Filter	4
Edit the Enrollment Drop Day Date Filters	4
Determining Whether and Which Variables to Use	6
Dashboard Prompt Options	6
What Types of Input Options Can Be Used in a Prompt?.....	6
Creating the Dashboard Prompt	9
Term Dashboard Prompt Field.....	9
Saving the Dashboard Prompt	11
Creating the Dashboard Prompt (cont.)	11
Enrollment Add Date Dashboard Prompt Field	11
Enrollment Drop Date Dashboard Prompt Field	12
Editing a Specific Dashboard Prompt	12
Formatting the Dashboard Prompt	13
Column-based Layout or Row-based Layout.....	13
Editing Page Settings.....	14
Creating the Dashboard Page	15
Adding a New Dashboard Page.....	15
Adding the Analysis and Prompt	16
Editing the Dashboard Page	17
Column Properties.....	17
Section Properties	18
Additional Information	18

About this Booklet

This UAccess Analytics booklet is designed to help you become familiar with dashboard prompts. For more extensive and specific information, please refer to the Prompting in Dashboards and Analyses section of the UAccess Analytics online Help documentation at https://analytics.uaccess.arizona.edu/analytics/olh/l_en/prompts.htm#BEIHHAGB

This booklet is generic by necessity, but will provide you with the information you need to build and maintain your own basic dashboard prompt.

For information on workshops in which you can learn how to build analyses and dashboards, as well as other brown bag demonstrations, please go to the Workshops and Training Team website at <http://workshops.arizona.edu>.

Access to Analytics Data

Request for Individual access to UAccess Analytics can be submitted to <https://request.uaccess.arizona.edu>.

UAccess Community

The UAccess Community is an online networking resource available to everyone on campus who uses UAccess systems.

If you have an official UA email address, you can request membership in the UAccess Community. Just go to <http://community.uaccess.arizona.edu> and click the Sign Up link in the upper right corner of the screen.

Once your membership is confirmed – usually within a few hours – you’ll have access to valuable information about all of the various aspects of the UAccess systems. You’ll want to join one or more of the groups within the Community, because that’s where the value comes in.

There is a Welcome Center available through a link on the Home page, as well as a great set of frequently asked questions (FAQs) linked through the top menu. Be sure to browse through the different Forums, check out upcoming Events, and peruse the extensive Resources provided through the Community.

Please take advantage of the opportunity and become a member of the UAccess Community now.

Prerequisites

You should be familiar with creating a basic analysis, probably having gone through the Basic Reports and Dashboards workshop at some point. You should also be familiar with creating a basic dashboard.

If you haven't created analyses of your own, you should certainly be familiar with the process.

At a minimum, you should have read and understand the contents of the **UAccess Analytics: Basic Reports and Dashboards** booklet. You can download a copy of that document from **UAccess Community > Resources > Analytics Resources**.

You should also be familiar with variables and how they're used. You can find all of the variables that can be used in Analytics on the **UAccess Analytics > Variables** dashboard.

Overview

There are just a few basic steps you need to accomplish to get your analysis working on your dashboard with your dashboard prompt. Of course, there are many, many intermediate steps, but it's helpful to start with a quick outline.

1. Create and/or edit your analysis.
 - a. Decide which filters you wish to use with your prompt.
2. Create your prompt using the filters you selected in step 1.a.
3. Put the analysis and the prompt together on a single dashboard page.

Premise

You've Already Created Your Analysis

As you will soon find out in more detail, a dashboard prompt works together with an analysis – a report – when the two things are created to work together and are then placed together on a dashboard.

You could certainly create a prompt and an analysis and put them together on your own personal dashboard. More likely, however, is that you're going to put them together on some level of shared dashboard. The assumption and premise

Training Guide

Creating a Dashboard Prompt



used in this booklet is that you've already created the basic analysis and have it available on a dashboard.

Now you need to edit the analysis to work with a prompt, create the corresponding dashboard prompt, and put the two things together on your personal dashboard or on a shared departmental or college dashboard. This booklet will take you through all three steps.

The particular analysis used in the example in this booklet is a **Student Census Analysis** created to provide a count of students enrolled in classes in a particular college on the 21st day of a Fall or Spring term.

You will be creating a prompt that will allow the user to change the term and to identify the 21st day, or any other day they wish to use to count their students.

What is a Dashboard Prompt?

You are probably already familiar with using dashboard prompts if you've ever used any of the Financials, Employee, Research, Student, or other shared dashboards available to you in UAccess Analytics.

A dashboard prompt is a specific kind of filter that, when created, saved, and applied to a dashboard or dashboard pages, can filter all or some of the analyses that are embedded in a dashboard page.

Dashboard prompts allow dashboard users to specify the data values that determine the content of some or all of the analyses contained on the dashboard.

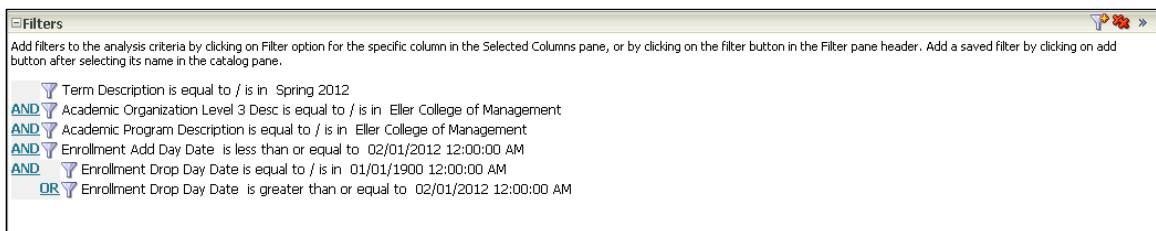
Dashboard prompts are reusable, because you can create one prompt and use it many times. When the prompt is updated and saved, those updates are immediately displayed in all dashboards where the prompt is used.

A dashboard prompt is interactive and is always displayed on the dashboard page so that the user can prompt for different values without having to entirely re-run the dashboard. Users can create and save dashboard prompts to either a personal folder or to a shared folder.

A dashboard prompt, therefore, is simply a dynamic filtering tool, made up of one or more dashboard prompt fields, used in conjunction with one or more analyses on a dashboard page.

Edit the Analysis to Function with a Prompt

You have created or are editing your analysis, but you want the analysis to work with a dashboard prompt. First, you'll have to decide which specific analysis filters will have to be modified to work with a prompt. Since the changes are going to be made to the filter, you will edit the analysis and open it to the Criteria tab. That's where you can see and edit the filter.



In the example here, you decide that the **Term Description**, the **Enrollment Add Day Date**, and one of the **Enrollment Drop Day Date** filters should be in the prompt. You can start editing.

Edit the Term Description Filter

Procedure

1. Hover your mouse pointer over the **Term Description** filter to see the button bar and click the **Edit** (pencil) button.
2. Make a note of the current operator – *is equal to / is in*. You'll need this information when you create the prompt.
3. Click the **Operator** drop-down list and select the *is prompted* operator.
This is the operator that makes the filter accept the data from the prompt field when the analysis and the prompt are together on a dashboard page.
4. Click **OK**.

Edit the Enrollment Add Day Date Filter

Procedure

1. Hover your mouse pointer over the **Enrollment Add Day Date** filter and click the **Edit** (pencil) button.
2. Note the current operator – *is less than or equal to*.
3. Click the Operator drop-down list and select the *is prompted* operator.
4. Click **OK**.

Edit the Enrollment Drop Day Date Filters

The dashboard prompt you will soon build will include a prompt field for **Enrollment Drop Day Date**. The filter in the example analysis has two instances of filters using that particular column. Take a look at the image on the previous page, focusing on the last two lines in the filter.

When you have that situation, the prompt will affect all instances of that filter, even if the operator of one of the filters is not supposed to be affected.

You must take some action to protect the filter you don't want affected.

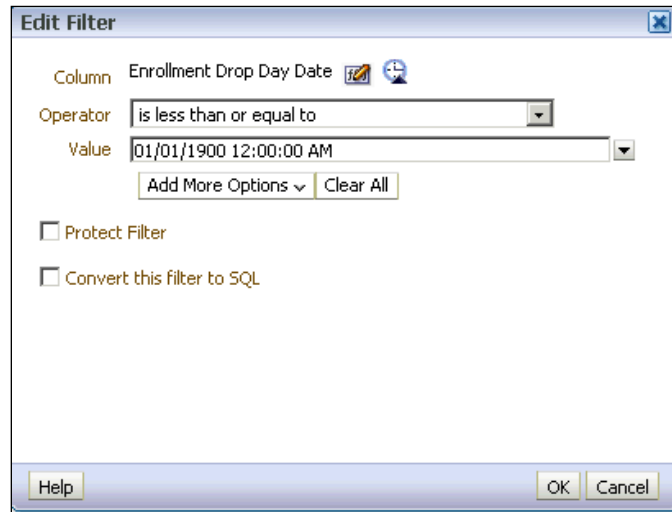
Procedure

1. Hover your mouse pointer over the first of the **Enrollment Drop Day Date** filters and click the **Edit** (pencil) button.

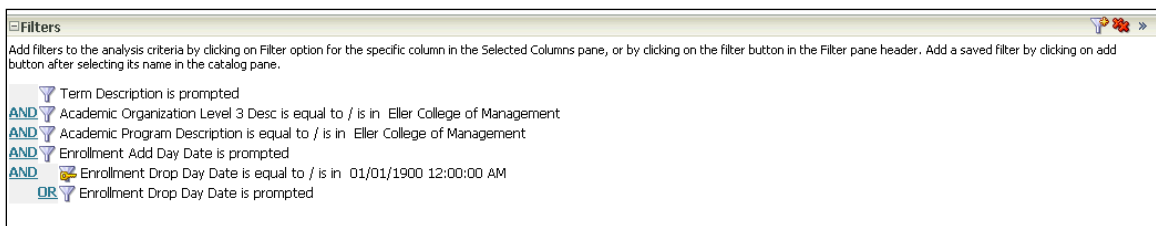
Enrollment Drop Day Date is equal to / is in 01/01/1900 12:00:00 AM

In this instance, you need to keep this filter from being changed by the prompt.

2. Click the **Protect Filter** checkbox. Checking this box will prevent the filter from being inadvertently modified by the prompt.



3. Click **OK**.
4. Now edit the second **Enrollment Drop Day Date** filter.
5. Note the current operator – *is greater than*.
6. Click the Operator drop-down list and select the *is prompted* operator.
7. Click **OK**.



Your filter should now look like this. Note the three instances where the filter *is prompted*. You should also note that the first of the two **Enrollment Drop Day Date** filters has a golden key over the filter symbol. This means that the filter is protected and cannot inadvertently be affected by the soon-to-be-built dashboard prompt.

8. **Save** the analysis.

Determining Whether and Which Variables to Use

While you could certainly create a prompt without using a variable, one of the prompts you will be creating for your dashboard will benefit from the addition of a variable. That prompt is the **Term Description** prompt. For example, you can set up the prompt so that the current term is always displayed by default.

There are a number of different variables that could be used to fill in the prompt field. You don't necessarily want to use hard-coded values like "Spring 2013." If you did use such a value, the user would have to edit or change the value every time they ran the dashboard!

Procedure

1. Navigate to **Dashboards > UAccess Analytics > Variables**.
2. Identify the **Repository Variable** that return the same or similar values to those you would have entered into the prompt fields on the dashboard.
 - a. You could enter Spring 2013 in the Term Description prompt field. Select the **UA_CUR_TERM** variable, which will return the appropriate value.
*If you wanted the analysis to show data from the previous term instead of the current term, for example, the appropriate variable would be **UA_PREV_TERM**.*
3. Please note that, while the variables are identified on the Variables dashboard as Repository Variables, when you use these variables in a dashboard prompt, you will use the **Server Variable** option.

Dashboard Prompt Options

You're nearly ready to create your prompt. But what type of prompt fields should you use with the different filters?

What Types of Input Options Can Be Used in a Prompt?

As you create your prompt, you must specify the prompt's user interface component. You can select from several options.

The **Radio Button** and **Text Field** options allow you to specify only one prompt value. The **Check Boxes**, **Choice List**, and **List Box** options allow you to select either one or multiple prompt values.

The input types that are available depend upon the column type that you are working with. The following sections provide basic information about each option.

Calendar

A Calendar prompt is the default option when a date field is used in a dashboard prompt. It will provide you with a small calendar box from which to choose the desired date or date range.

Check Boxes

Check Boxes provide you with a visible list of all prompt values with a checkbox for each item. This option is suitable for a prompt that contains a smaller set of data. By default, you can select one or more prompt values. To select specific prompt values, scan the list and click the box that corresponds to a particular item.

Note: The **List Box** input option (below) is suitable for a prompt that contains a larger set of data.

Choice List

The Choice List is the **default option** for most prompt fields and provides you with a collapsed list of all prompt values. This option is useful for a long list of values and gives you the ability to search for a specific value. You can set up this prompt to accept only one value or multiple values.

List Box

The List Box provides you with a visible list of all values. This option is suitable for a prompt that contains a large set of data. You can set up this prompt to allow selection of only one value or of multiple values.

Note: The **Check Boxes** input option (above) is suitable for a prompt that contains a smaller set of data.

Radio Buttons

Radio Buttons provide you with a visible list of all prompt values where a Radio Button is displayed before each prompt value. This option type is useful for very short lists of values with the option to select only one prompt value. Just scan the list and select the radio button that corresponds to a particular item.

Text Field

A Text Field provides you with a field into which the user can type a specific value. You cannot use this option for multiple prompt values. Only the field and the field label display for this option. There is no selection list. This option is useful in instances where you know the prompt value and do not have to search for it, or for when you need to enter numeric values.

The prompt value that you enter must exactly match the column's value. For example, if the values for a specific field include EDUCATION (in all capital letters), the user must type **EDUCATION** into the text field. Entering **education** or **Education** or some other variation will return no data. Numeric values cannot contain commas.

Creating the Dashboard Prompt

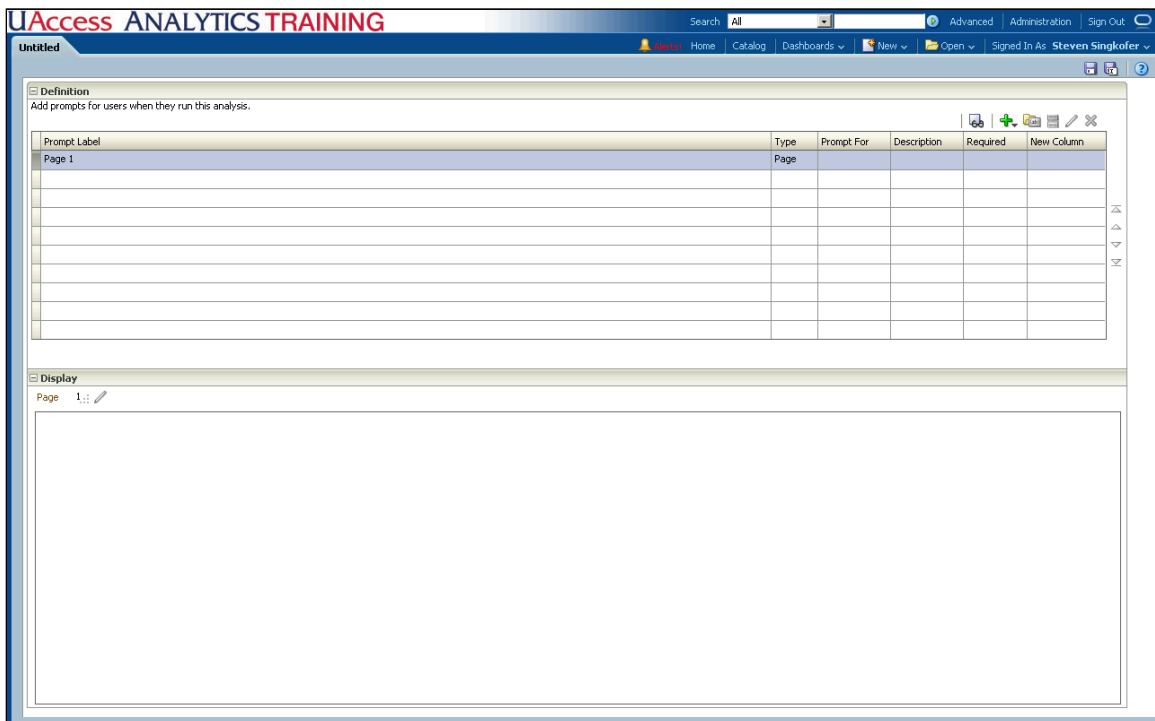
Now that you've edited your analysis and set the desired specific filters to use the "is prompted" operator, and have protected the one specific filter that required protecting, you can move on to creating the dashboard prompt.

Please note that the system uses the term "*dashboard prompt*" to mean two different things. Dashboard prompt can mean either the entire prompt and all its fields together as a unit, or those words might simply refer to just one of the fields within the overall prompt. To avoid that complication, this booklet uses "*dashboard prompt*" to refer to the overall set of fields, and uses "*dashboard prompt field*" to refer to one of the fields contained within the larger dashboard prompt.

Term Dashboard Prompt Field

Procedure

1. Click the **New** menu item on the global header.
2. Select the **Dashboard Prompt** menu item.
3. Scroll through the Subject Area list and select the subject area that you used when you originally created the analysis. In this instance, that would be the **CSW – Student Records – Class Enrollment** subject area.



4. Click the **New** button (bright green “plus” sign) and select **Column Prompt** from the short menu.
5. Open the **Term** table and select the **Term Description** column.
6. Click **OK**.

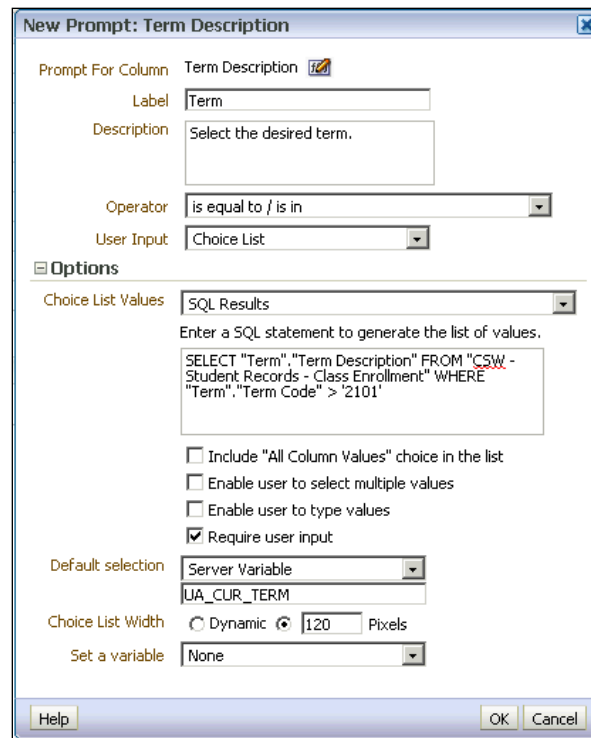
You can leave the fields on the **New Prompt: Term Description** screen as they are or edit them as you'd like. If you enter a Description, that text will appear when you hover your mouse pointer over the specific field label on the dashboard.

Here, the **Label** field has been modified and a **Description** has been added.

The **Operator** field defaults to the *is equal to / is in* operator. That's the correct choice, based on the note you should have made when you edited the Term Description filter in the analysis.

The **Options** section of the screen has been expanded to reveal additional fields.

The **Choice List Values** field has been changed so you can use **SQL Results** to limit the choices that are available. This is a great option to use so that dashboard users won't have to scroll through dozens of options to get to the values that will actually return data.



In this case, the SQL code limits the Term Description options to only those terms where the Term Code is greater than 2101. That code equates to Spring 2010. The resulting list of options presented to users will begin with Summer 2010, although the first option users will see will be Fall 2010, as the list is sort alphabetically. The list will continue to grow as time goes by, adding terms as they are added to UAccess Student and flow through to Analytics.

A check was placed in the **Require user input** checkbox, making this a required prompt field.

The **Default Selection** option has been changed to allow use of a **Server Variable**. That allows you to insert a variable from the Analytics Variables

dashboard – UA_CUR_TERM – that will automatically fill in the prompt with the description that matches the current term. That helps the end user by filling out the prompt with a value they'd otherwise have to fill out manually. There are many other variable options you could use. Refer to the Analytics Variable dashboard to see those options.

Saving the Dashboard Prompt

You've made a good start on creating your new dashboard prompt, and this is a good time to save that prompt for the first time.

Procedure

1. Click the **Save Prompt** button.
2. Select the **Dashboard Prompt** menu item.
3. Save the prompt in your own **My Folders** folder.

Please note that if you were creating this prompt for use on a shared dashboard, you would have to save the prompt into the appropriate shared folder.

4. Enter **Student Census Prompt** in the Name field. You can also provide some descriptive information.
5. Click **OK**.

Creating the Dashboard Prompt (cont.)

Enrollment Add Date Dashboard Prompt Field

Procedure

1. Click the **New** button (bright green "plus" sign) and select **Column Prompt** from the short menu.
2. Open the **Day Enrollment Add Date** table and select the **Enrollment Add Day Date** column. Click **OK**.
3. You want this prompt to capture students who have added classes on or before the selected date. Click the **Operator** drop-down list and select the *is less than or equal to* prompt, based on the note you made when you edited the filter in the analysis.

4. Expand the **Options** section of the screen and put a check in the **Require user input** checkbox.
5. Click **OK**.
Note that the prompt, as it's displayed in the Display area of the screen, shows the "<=" operator as part of the prompt title.
6. Click the **Save Prompt** button to save your changes.

Enrollment Drop Date Dashboard Prompt Field

Procedure

1. Click the **New** button (bright green "plus" sign) and select **Column Prompt** from the short menu.
2. Open the **Day Enrollment Drop Date** table and select the **Enrollment Drop Day Date** column. Click **OK**.
3. You want this prompt to capture students who have dropped classes after the selected date. Click the **Operator** drop-down list and select the *is greater than* prompt, based on the note you made when you edited the filter in the analysis.
4. Expand the **Options** section of the screen and put a check in the **Require user input** checkbox.
5. Click **OK**.
Note that the prompt, as it's displayed in the Display area of the screen, includes the ">" operator as part of the prompt title. Also note the asterisk next to each prompt label. The asterisk denotes required prompt fields.
6. Click the **Save Prompt** button to save your changes.

Editing a Specific Dashboard Prompt

You can edit any prompt field you've created simply by double-clicking the prompt you wish to change. You could also select the prompt by clicking on it to highlight the prompt, then click the **Edit** (pencil) button in the upper-right corner of the screen.

Formatting the Dashboard Prompt

You've successfully created each of the required prompts, based on those filters you edited in the analysis.

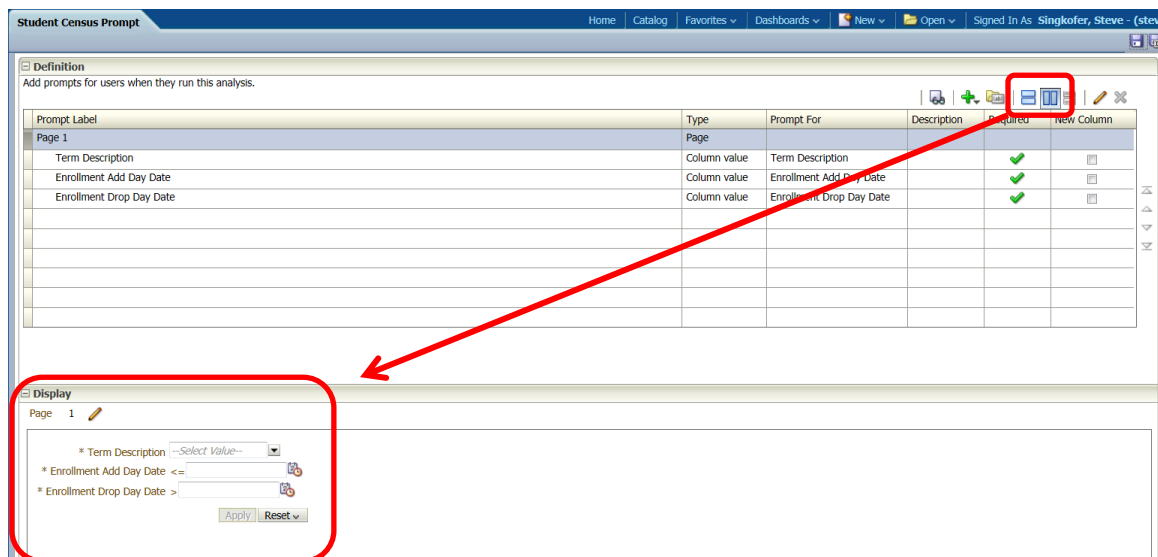
There are other options you should know about regarding the formatting of the dashboard prompt.

Column-based Layout or Row-based Layout

One of those options is how you want the overall prompt displayed on your dashboard. The prompt fields can be displayed in a column layout so that they appear above one another on one side of your dashboard. This is the default layout. You can alternatively elect to have the prompt fields displayed in a row layout, which is how the prompts are displayed on the majority of the University-level shared dashboards.

Procedure

1. Click the **Row-based layout** button to change the layout to that form.
The change is immediate and can be seen in the Display area at the bottom of the screen.
2. Click the **Column-based layout** button to change the layout back to the default option.



The screenshot shows the 'Student Census Prompt' configuration window. The 'Definition' tab contains a table with the following data:

Prompt Label	Type	Prompt For	Description	Required	New Column
Page 1	Page				
Term Description	Column value	Term Description		✓	<input type="checkbox"/>
Enrollment Add Day Date	Column value	Enrollment Add Day Date		✓	<input type="checkbox"/>
Enrollment Drop Day Date	Column value	Enrollment Drop Day Date		✓	<input type="checkbox"/>

The 'Display' tab shows the following form fields:

- * Term Description: --Select Value--
- * Enrollment Add Day Date: <=
- * Enrollment Drop Day Date: >

Buttons for 'Apply' and 'Reset' are visible at the bottom of the 'Display' tab.

Editing Page Settings

There are other options you might wish to investigate. By default, the prompt title is displayed to the side of the prompt field. Some users find it easier to see or use the prompt when the prompt title is above the field.

To access those other options, you can highlight the Page 1 line in the Definition screen then click the Edit (pencil) button in the upper-right, or click the Edit (pencil) button in the Display area of the screen.

You can also elect to place the Apply and Reset buttons below the prompts or to the side of the prompts. Or you can leave the buttons off altogether, although that wouldn't be a recommended practice.

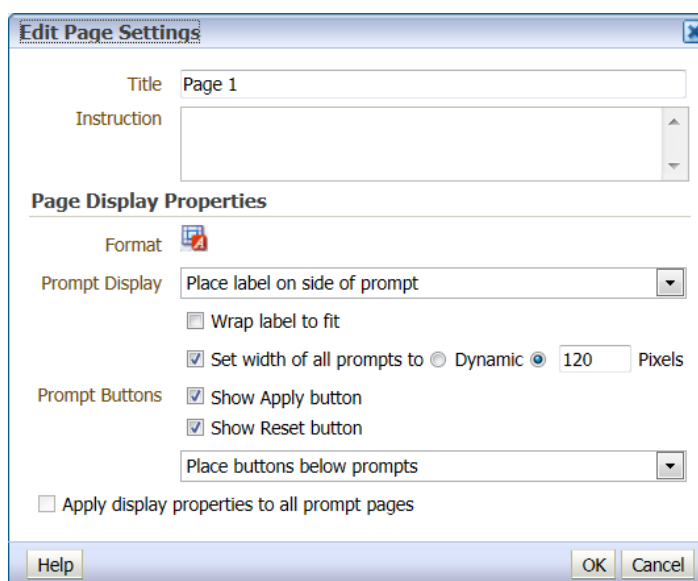
Procedure

1. Click the **Edit (pencil)** button to open the **Edit Page Settings** screen.
2. Make your desired changes.

Please note that when you edit the page settings, you should either delete the existing "Page 1" title or replace that title with something more appropriate to your users. The recommendation would be to delete the title and leave the field blank, as is done on the University-level dashboards. The choice is yours, however.

You can change the **Prompt Display** field to "Place label on side of prompt" or "Place label above prompt." If you choose to place the label above the prompt, the font will automatically be redrawn in bold font.

You can change the **Prompt Buttons** option to "Place buttons below prompts" for a column-based layout or select "Place buttons on side of prompts" for a row-based layout.



3. Click **OK** to apply your changes.
4. Click the **Save Prompt** button to save your changes.

Creating the Dashboard Page

You've now edited your analysis to make it work with a dashboard prompt, and you've just finished creating your dashboard prompt. Now it's time to create the dashboard page and put the analysis and prompt together on that page so they work together.

In this workshop, you will create a personal dashboard page. In real life, you may very likely be creating a shared dashboard page at either the department or college level. The steps are identical in either case. The only differences would be where the analysis and prompt have been saved and are pulled from, and where the dashboard would be accessed.

If you've worked with any of the University-level shared dashboards, you've probably noticed that they all follow a standard layout. You can choose to emulate that layout, or come up with your own departmental- or college-level layout. One key factor is that you be consistent with your dashboards. All of your dashboards should resemble one another to a large degree, which cuts down on the learning curve required of your users.

Adding a New Dashboard Page

A default dashboard has only one page. In many dashboards, you will find it useful to have multiple pages or tabs.

Procedure

1. Click the **Dashboards** link on the global header.
2. Select the **My Dashboard** menu item.
3. Click the **Edit (pencil)** button in the center of the blank dashboard.

You are editing the only page that currently exists on your dashboard. You might wish, however, to create multiple pages.

4. Click the **Add Dashboard Page** button to create a new dashboard page.
5. Enter "Creating Dashboard Prompts" in the **Page Name** field. Enter any description information you wish to include as hover help for your new page.
6. Click **OK**.

Adding the Analysis and Prompt

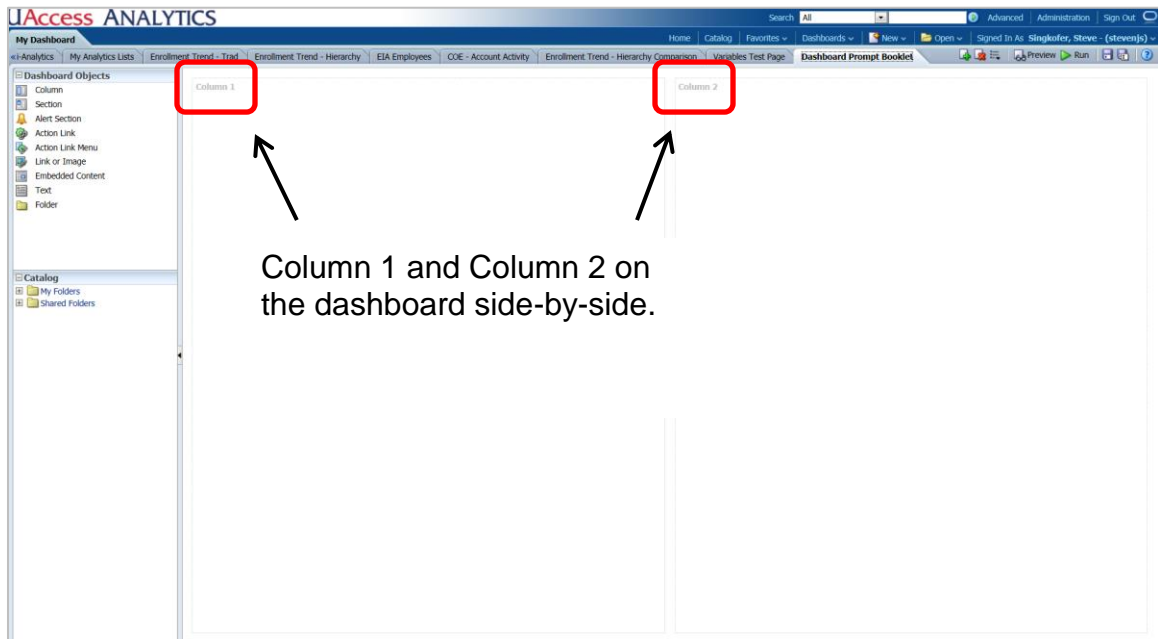
Now that you've created your new page, it's time to add the prompt and analysis. Because the two items were created from the same Subject Area, and because you've edited the analysis filters, the prompt and analysis will automatically work together once they're on the same dashboard page.

Depending on the structure you wish to create and how you've laid out your prompt, you might simply drag the prompt and analysis onto the existing blank page. Alternatively, you might wish to begin by adding two columns to establish the basic underlying structure.

In the example in this booklet, the prompt has been laid out using a column-based layout. In order to force the dashboard to display in a specific fashion, two columns will be added.

Procedure

1. Drag a **Column** from the Dashboard Objects pane onto the large, grey area on the right.
2. Drag a second **Column** onto the dashboard and place it to the left of the first column. You will have to position your mouse about halfway down the screen in order to get the columns to appear side-by-side.



3. Open the **My Folders** folder in the **Catalog** pane.
4. Locate your **Student Census Prompt** and drag it into the left-hand column on the dashboard.

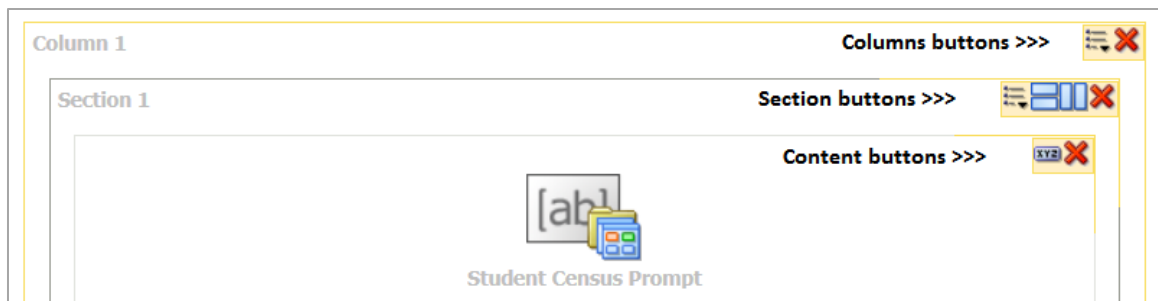
5. Locate the **Student Census Analysis** and drag it into the right-hand column on the dashboard.
6. Click the **Save** button.
7. Click **Run** to view your dashboard.

Editing the Dashboard Page

You've created a very basic dashboard page with a prompt. There are some optional edits you can make to enhance the visual appeal of the dashboard.

You might, for example, set the width of the left-hand column to a permanent width so that it doesn't resize as you work with the dashboard. You might also wish to remove the Collapse button you see in the upper-left corner of each section of the dashboard.

This image shows you all of the buttons available to you on the construction side of the dashboard. You will only ever see one set of buttons at a time, as you hover over individual points on the dashboard.



Column Properties

Procedure

1. Click the **Page Options** button.
2. Select the **Edit Dashboard** menu item.
3. Hover your mouse pointer over **Column 1**, click the **Properties** button and select **Column Properties**.
4. Expand the **Additional Formatting Options** section of the **Column Properties** screen.
5. Enter 20% in the **Width** field. If you neglect to enter the percent symbol, the system will interpret the number as pixels. Click **OK**.

Section Properties

Procedure

1. Hover your mouse pointer over **Section 1** in **Column 1** and click the **Properties** button.
2. Remove the check mark from the Collapsible menu item.
3. Hover your mouse pointer over **Section 1** in **Column 1** again and click the **Properties** button.
4. Select the **Format Section** menu item.
5. Change the **Border Position** field to **None**. Click **OK**.
6. **Repeat** these steps for Column 2, Section 2.
7. Click the **Save** button.
8. Click **Run** to see your changes.

Additional Information

You will find additional information pertaining to your department- or college-level dashboard on the **Resources > UAccess Analytics** page on the **UAccess Community** at <http://community.uaccess.arizona.edu>.

