Insight Features Overview

United States Department of Agriculture
Office of the Chief Financial Management
National Finance Center

Enterprise Reporting Project

November 27th, 2012

Solution Introduction

Insight is a comprehensive, enterprise-wide reporting data warehouse with advanced reporting and business intelligence capabilities. *Insight* is accurate, reliable, and agile – providing customers with an integrated system of data, easy-to-use dashboards, and analytics. This advanced reporting solution enables data-driven decisions based on strategic business insights.

If you are a report creator, user or manager, *Insight* changes the way that you evaluate your organization's data. *Insight* incorporates information from multiple sources into a single data warehouse, allowing you to view and compare data in new ways. *Insight* is user-friendly, with easy drag and drop functionality and new reporting features such as graphs, maps and dashboards. Through *Insight*, you can use any of the pre-built common reports or the ad hoc functionality to build your own reports that meet your agency's specific reporting needs.

This Product Guide accompanies the *Insight* demonstration and provides a detailed look at some of the key features that are available in *Insight*.

General Navigation

General Navigation

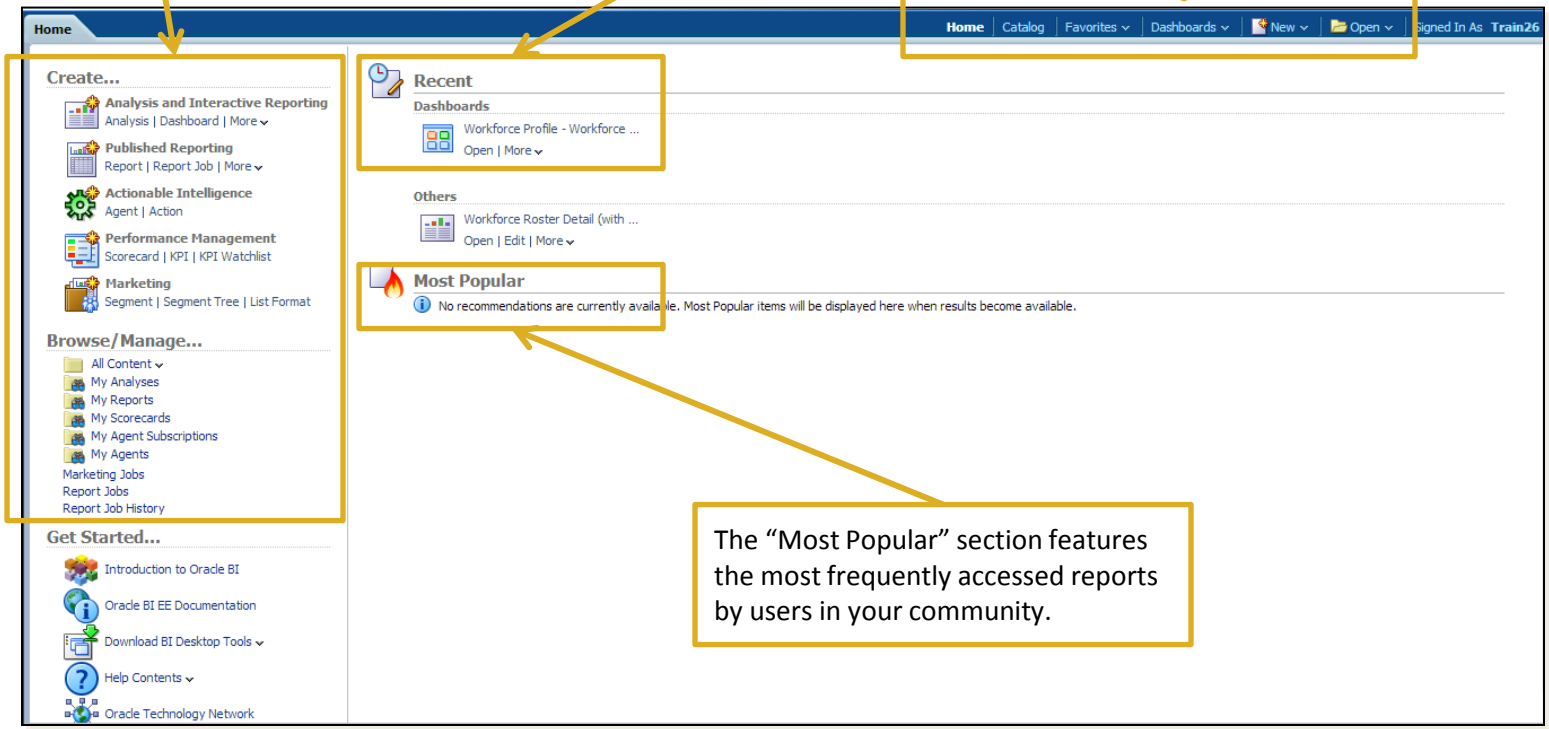
1 of 1

The home screen provides intuitive navigation of the features of *Insight*

The "Create" section allows you to start a new report (or "Analysis"), while "Browse/Manage" provides another way to access your existing reports and dashboards.

The "Recent" section lists your most recently used reports and dashboards.

The "Top Navigation Bar" contains the common controls. This menu is always visible while logged in. From this area you can open existing reports, create new reports, access your dashboards, mark favorites or browse the pre-built reports through the Catalog.



The "Most Popular" section features the most frequently accessed reports by users in your community.

Standard Reports

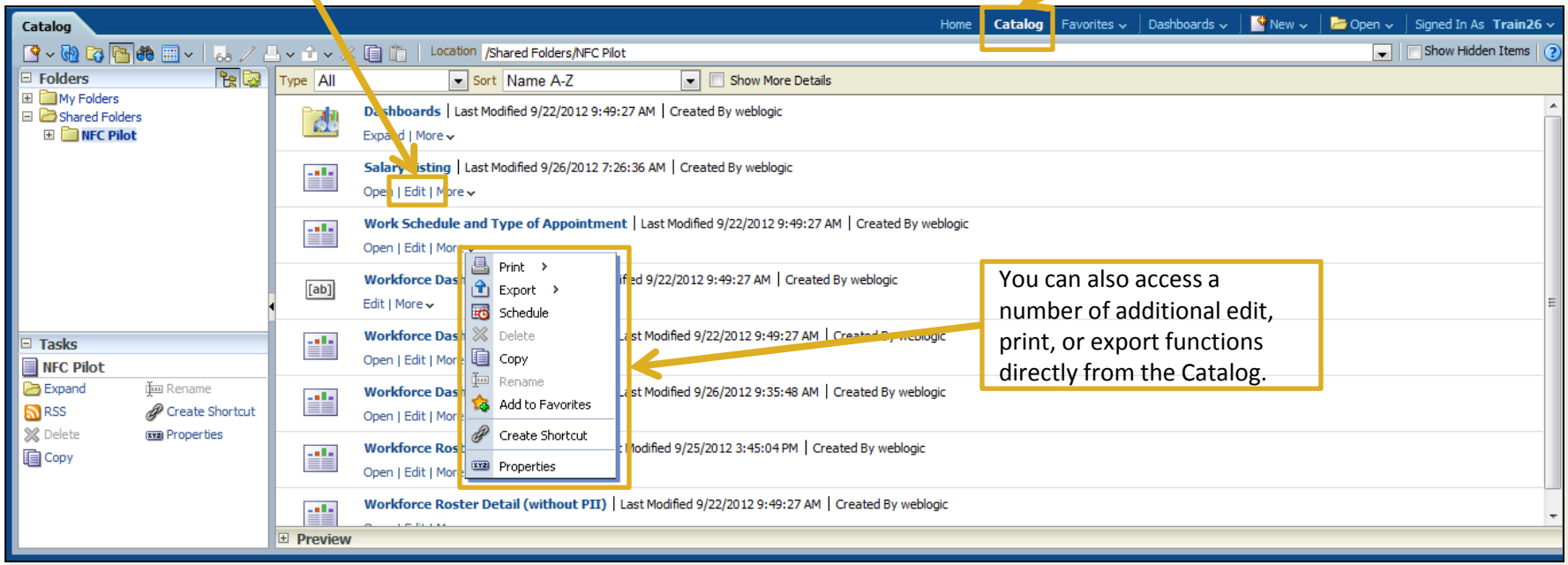
Standard Reports

1 of 2

Insight includes a number of pre-built reports based on the common reporting needs of our customer organizations. These reports were developed in partnership with representatives from our customer agencies. The pre-built reports are available in *Insight* via the Catalog.

From the Catalog you can open common reports, as well as edit and save them to My Folders for customized use.

All common reports and any saved ad hoc reports are all available through the Catalog.



You can also access a number of additional edit, print, or export functions directly from the Catalog.

Standard Reports

2 of 2

When you open a report, the default view is a table of data based on the selected filters.

When you run a report, a table of data appears.

You can select columns and drag them to new positions in the table, as well as easily sort or exclude columns.

Workforce Roster Detail (without PII)

Home | Catalog | Favorites | Dashboards | New | Open | Signed In As Train26

Workforce Report
Workforce Roster Detail (without PII)

Employee Count: 1

Org Structure	POI	Employee Name	Pay Plan-Grade	Occ Series	Occ Category (PATCO)	Position Official Title	Position Working Title	Type of Appointment	Work	Type Of	ty ation	Supervisory Status
TDDS0396225000000000	3246	Braunschweig, Karl W	GS-09	0986	T	LEAD LEGAL ASSISTANT	LEAD LEGAL ASSISTANT	Competitive-Career, SES Career			W YORK, NY	Leader
TDDS0396292000000000	1192	Laura, Miller R	GS-15	0560	A	LEAD BUDGET ANALYST	LEAD BUDGET ANALYST	Competitive-Career, SES Career			SHINGTON,	Leader
TDDS0396314000000000	1192	Lisa, Brossia A	GS-12	1640	A	LEAD BUILDING SPECIALIST	LEAD BUILDING SPECIALIST	Competitive-Career, SES Career			SHINGTON,	Leader
TDDS0396523000000000	3189	Paul, Finlayson M	GS-12	0301	A	LEAD SPACE MANAGMENT SPECIALIST	LEAD SPACE MANAGMENT SPECIALIST	Competitive-Career, SES Career			N ANCISCO,	Leader
TDDS0396571000000000	1192	Guo, Hailong J	GS-08	0986	T	LEAD LEGAL ASSISTANT	LEAD LEGAL ASSISTANT	Competitive-Career, SES Career			SHINGTON,	Leader
TDDS0396620000000000	1192	Amanda, Itria W	GS-07	0326	T	LEAD OFFICE AUTOMATION ASSISTANT	LEAD OFFICE AUTOMATION ASSISTANT	Competitive-Career, SES Career	Full Time	Full-Time	WASHINGTON, DC	Leader
TDDS0396632000000000	1192	Kerby, Terry L	GS-08	0986	T	LEAD LEGAL ASSISTANT OA	LEAD LEGAL ASSISTANT (OA)	Competitive-Career, SES Career	Full Time	Full-Time	WASHINGTON, DC	Leader
TDDS0396968000000000	3224	Moore, Fannie R	GS-12	0201	A	LEAD HUMAN RESOURCES SPECIALIST (COMPE	LEAD HUMAN RESOURCES SPECIALIST (COMPE	Competitive-Career, SES Career	Full Time	Full-Time	CHICAGO, IL	Leader
TDFY0393326000000000	3189	Wang, Jie	GS-06	0998	C	LEAD CLAIMS CLERK OA	LEAD CLAIMS CLERK (OFFICE AUTOMATION)	Competitive-Career, SES Career	Full Time	Full-Time	LONG BEACH, CA	Leader
TDFY0393363000000000	1192	Andrew, Murrell M	GS-15	0958	A	PENSION LAW SPECIALIST	PENSION LAW SPECIALIST	Competitive-Career, SES Career	Part-Time	Part-Time	WASHINGTON, DC	Leader
TDFY0395119000000000	3226	Lee, Donald R	GS-13	1811	A	LEAD CRIMINAL INVESTIGATOR	LEAD CRIMINAL INVESTIGATOR	Competitive-Career, SES Career	Full Time	Full-Time	NASHVILLE, TN	Leader
TDFY0395716000000000	3444	Gloria, Ford R	GS-15	0343	A	LEAD PROGRAM ANALYST	LEAD PROGRAM ANALYST	Competitive-Career, SES Career	Full Time	Full-Time	WASHINGTON, DC	Leader
TDFY0395746000000000	3224	Dennis, Drescher M	GS-12	0856	T	LEAD ELECTRONICS TECHNICIAN	LEAD ELECTRONICS TECHNICIAN	Competitive-Career, Conditional	Full Time	Full-Time	CINCINNATI, OH	Leader
TDFY0395802000000000	3246	Kernsmith, Poco M	GS-13	0343	A	LEAD MANAGEMENT ANALYST	LEAD MANAGEMENT ANALYST	Competitive-Career, SES Career	Full Time	Full-Time	NEW YORK, NY	Leader
TDFY0395904000000000	3392	Anderson, Juanita W	GS-13	0343	A	LEAD MANAGEMENT ANALYST	LEAD MANAGEMENT ANALYST	Competitive-Career, SES Career	Full Time	Full-Time	PHILADELPHIA, PA	Leader
TDRR0390229000000000	1192	Kozma, Thomas	GS-14	0341	A	ADMINISTRATIVE OFFICER	ADMINISTRATIVE OFFICER	Competitive-Career, SES Career	Full Time	Full-Time	WASHINGTON, DC	Leader

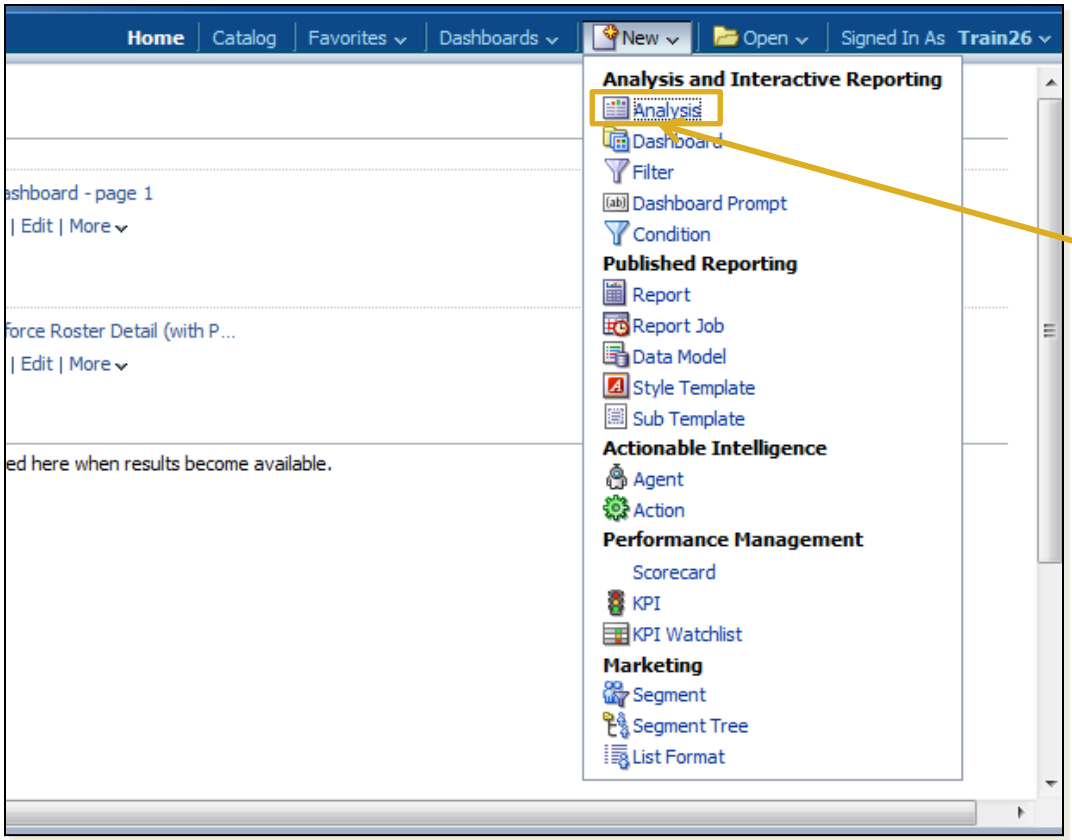
Sort Column
Keep Only
Remove
Show Subtotal
Show Row level Grand Total
Exclude column
Hide Column
Move Column

Ad Hoc Reports

Ad Hoc Reports

1 of 5

Insight includes ad hoc reporting functionality which allows you to create agency-specific reports with the data elements available in the solution. *Insight* provides flexibility with your data - combining data elements, creating new reports, and displaying results in multiple formats such as graphs, maps, and trending visuals.



Create a new report, or Analysis, via the "New" tab on the top navigation bar.

Ad Hoc Reports

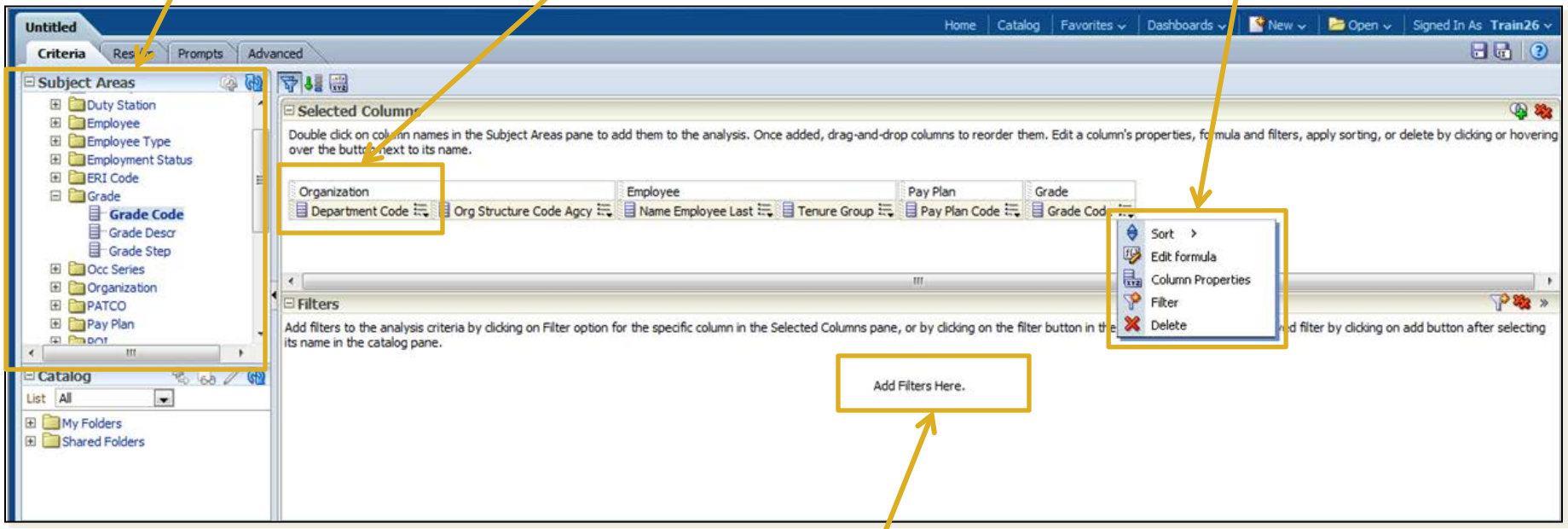
2 of 5

You can create an ad hoc report with the data elements available to you based on your user role in the solution. Creating a report is as simple as selecting the data elements and dragging them to the working area for additional editing.

Select the data elements to include in the report from the "Subject Area".

Drag and drop data elements into columns.

Sort or edit column properties such as formatting and creating filters.



Add Filters Here.

You can select the data that appears in your report by adding a filter.

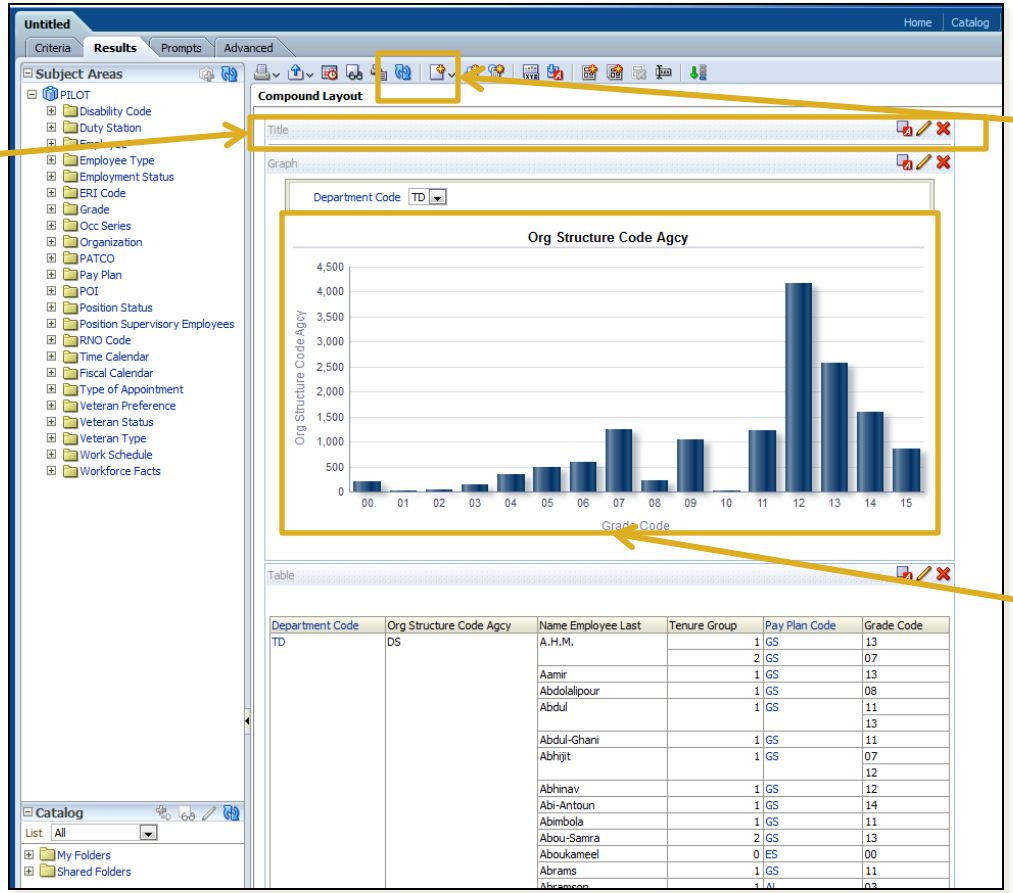
Ad Hoc Reports

3 of 5

Viewing your ad hoc report is seamless through the “Results” tab. This tab displays your data in a table format, but you can also add additional views including graphs, pivot tables, and maps.

Title your graph and save it for future use or to include in a dashboard.

Select views to add to the report such as pivot tables or graphs.



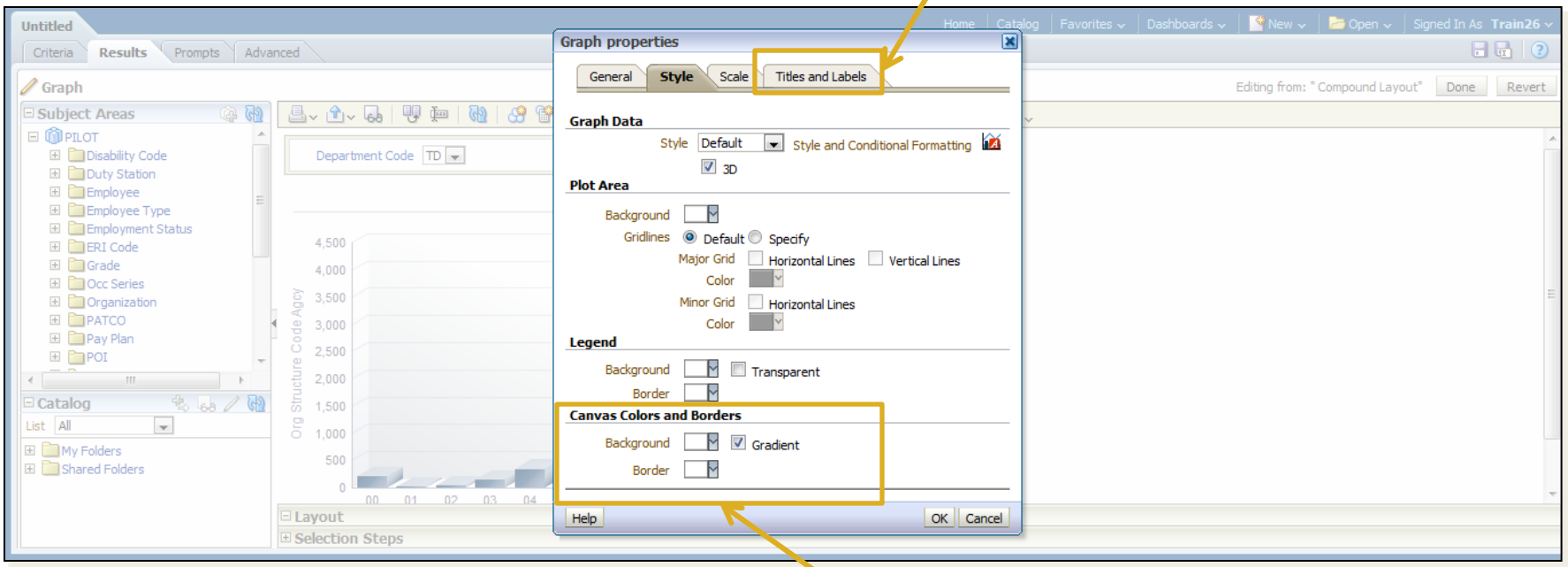
See your data selections in multiple graph formats.

Ad Hoc Reports

4 of 5

Insight allows further customization of your reports, including changes to color, 3D style, size, scale, titles and labels.

Edit the titles and axis labels to customize your graph.



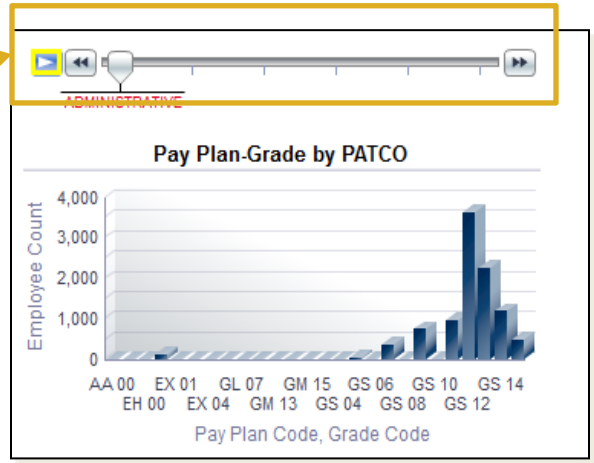
Change the canvas and graph. colors.

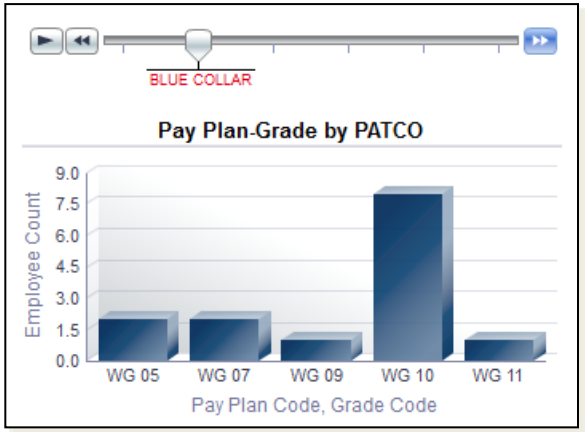
Ad Hoc Reports

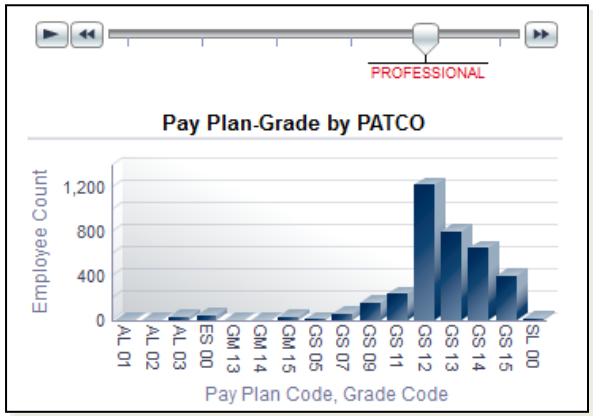
5 of 5

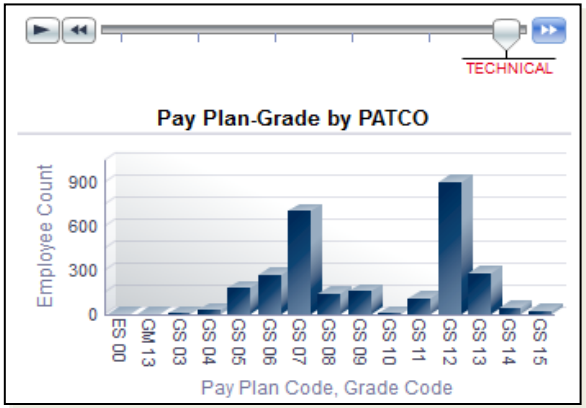
Insight graphs also include the functionality to view changes in information over time or data sets. The example portrayed demonstrates this functionality with Pay Plan Codes and Grade Codes based on level.

Move the slider bar to animate the graph to display the next data set.









Standard Dashboards

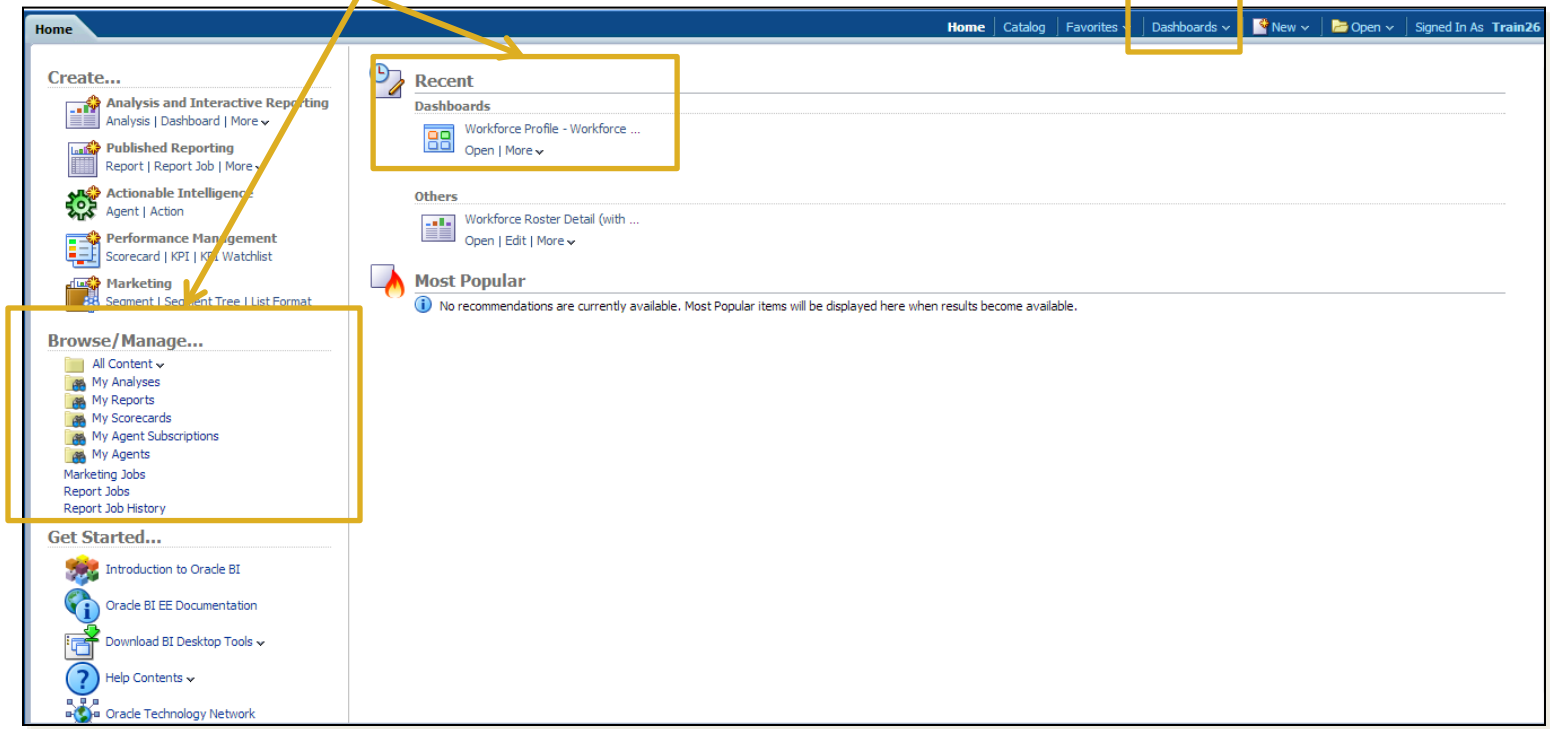
Standard Dashboards

1 of 4

In addition to common reports, *Insight* also includes a number of common dashboards. Dashboards combine several reports in one executive-level view to provide a range of data on a specific topic.

You can browse dashboards from the home screen through the Browse/Manage section, or in your recent files.

Common Dashboards are accessible from any screen through the top navigation bar.



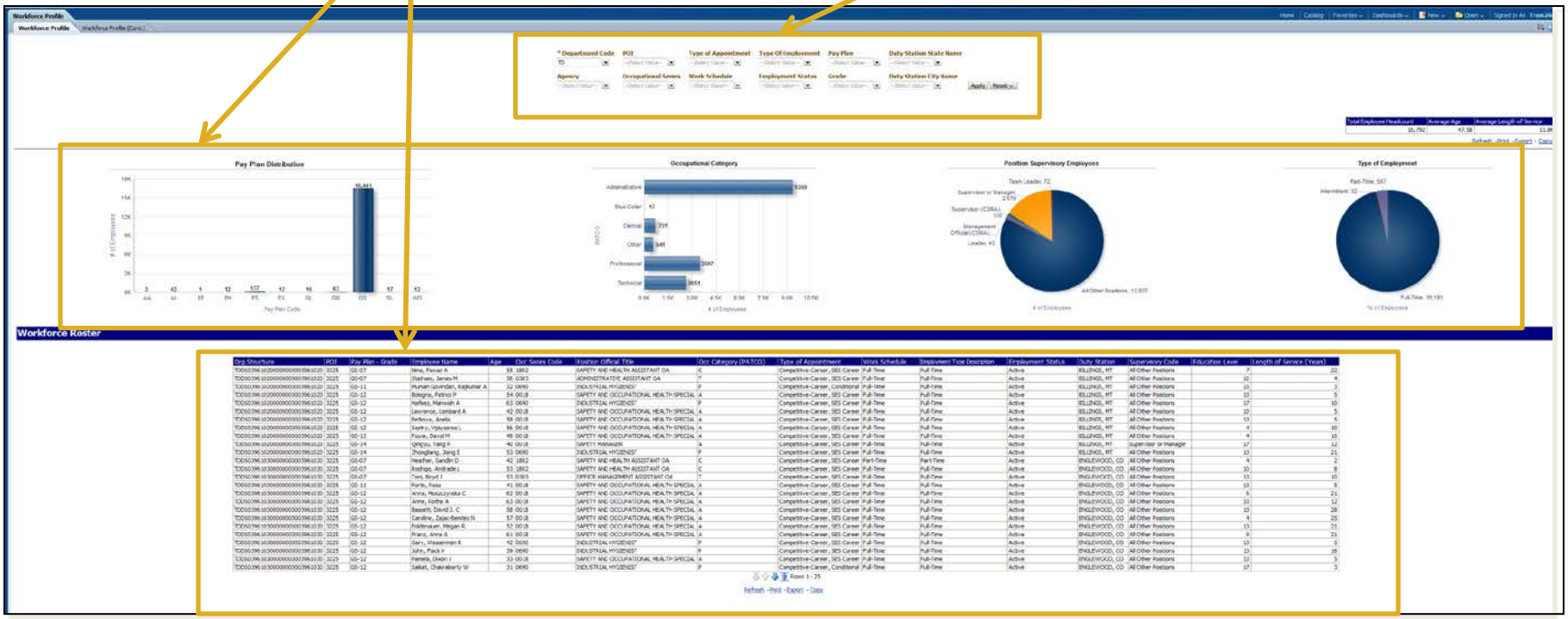
Standard Dashboards

2 of 4

Dashboard prompts are included to customize the data viewed in the dashboard.

Standard dashboards provide aggregated reports as well as several visualizations of the data.

You can filter a standard dashboard for specific data results using the prompts at the top.

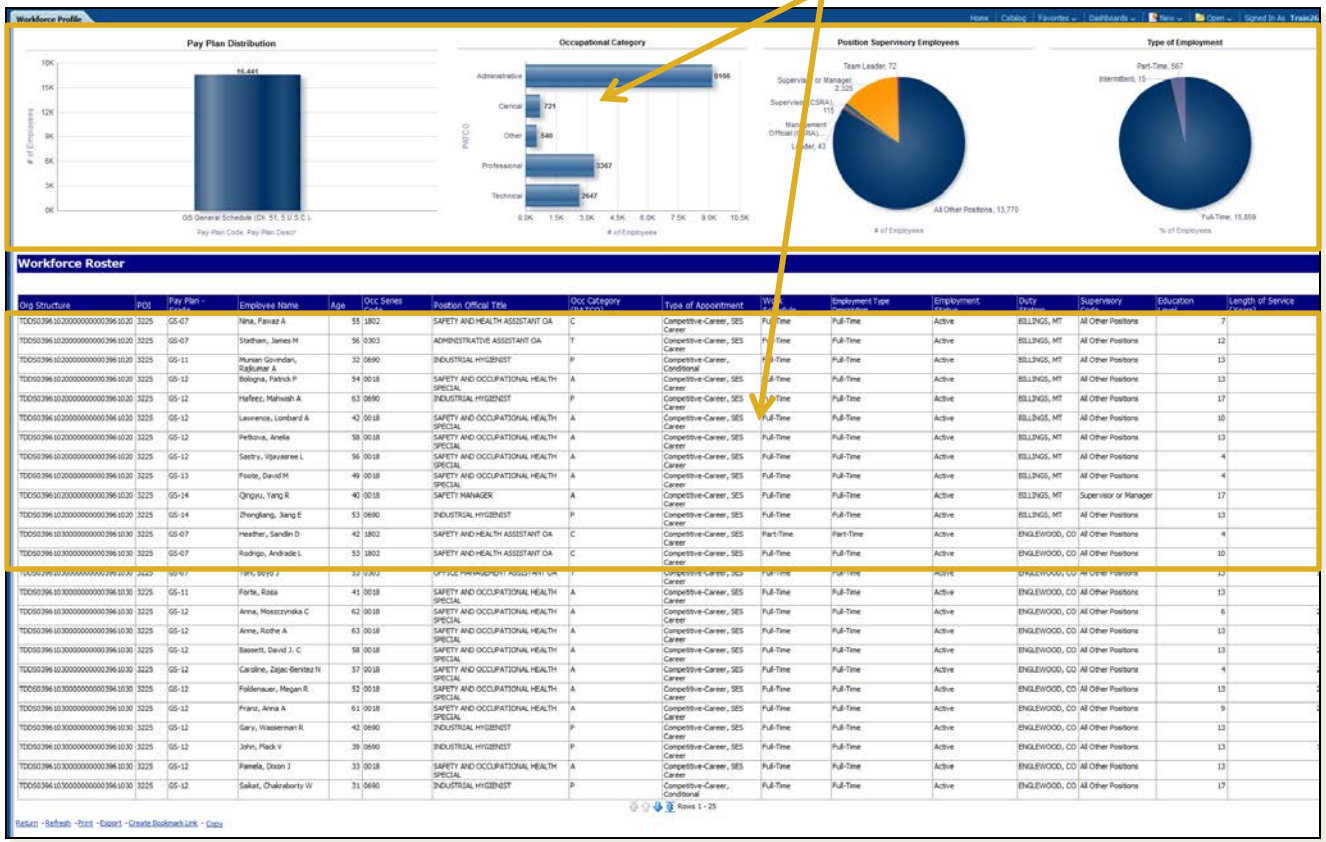


Standard Dashboards

3 of 4

With *Insight* dashboards, you can dig deeper into specific data using the "drill-down" feature. To drill down, select the desired data set from a graph. In this example of a drill-down, we clicked on the GS General Schedule bar in the dashboard above to see more details about this data area.

The charts and report table are updated automatically to reflect the selected data element.



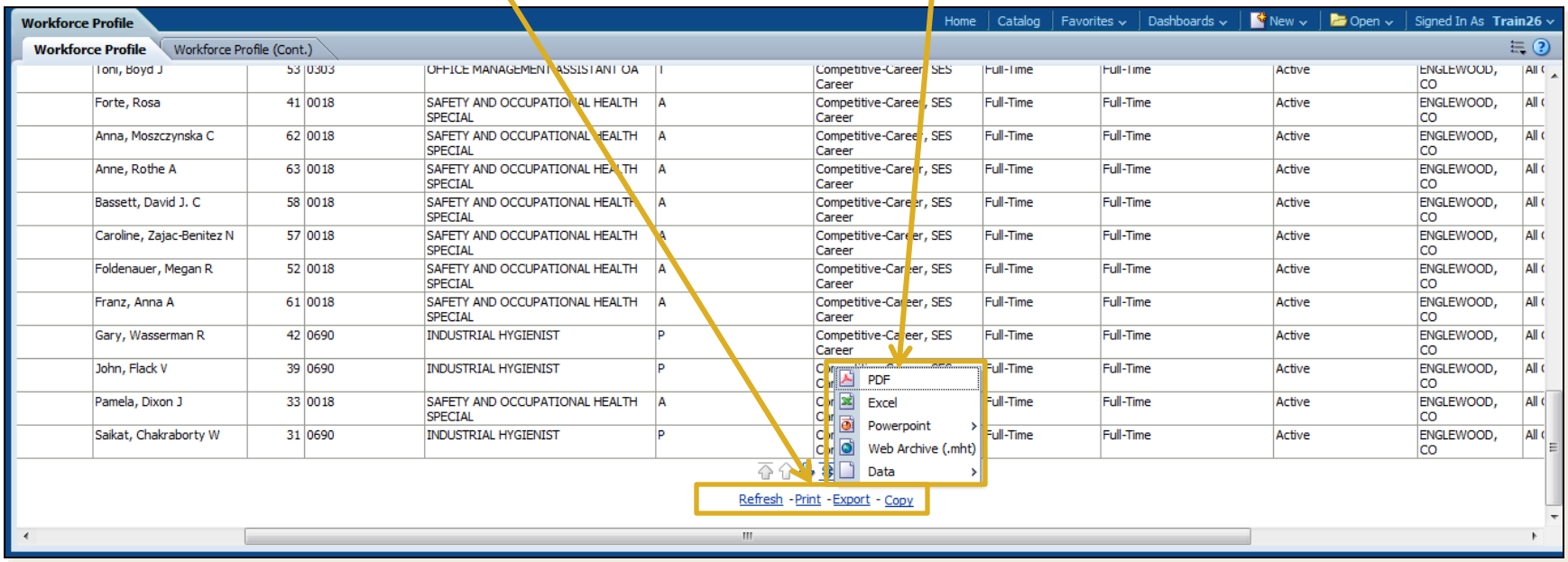
Standard Dashboards

4 of 4

There are several options to easily print, export, or copy dashboards into workable files. Print and export options include: Excel, PDF, PowerPoint, Web Archive or Data formats.

Refresh, Print, Export or Copy the dashboard.

Export the dashboard in a number of formats.



Creating a Dashboard

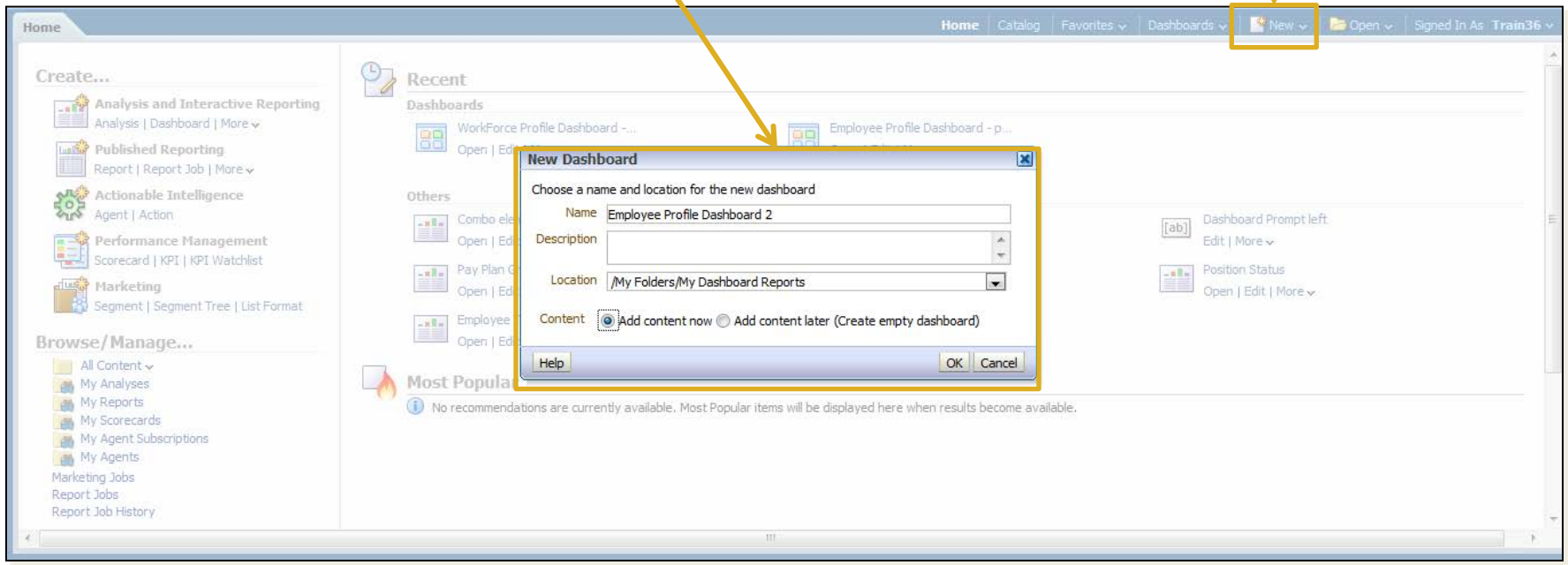
Creating a Dashboard

1 of 3

You can create an ad hoc dashboard with any reports that are available in your personal or shared folders, including common reports and ad hoc reports.

Create and save your new dashboard to your personal folder.

To open a new dashboard, use the "New" drop down menu from the top navigation bar.



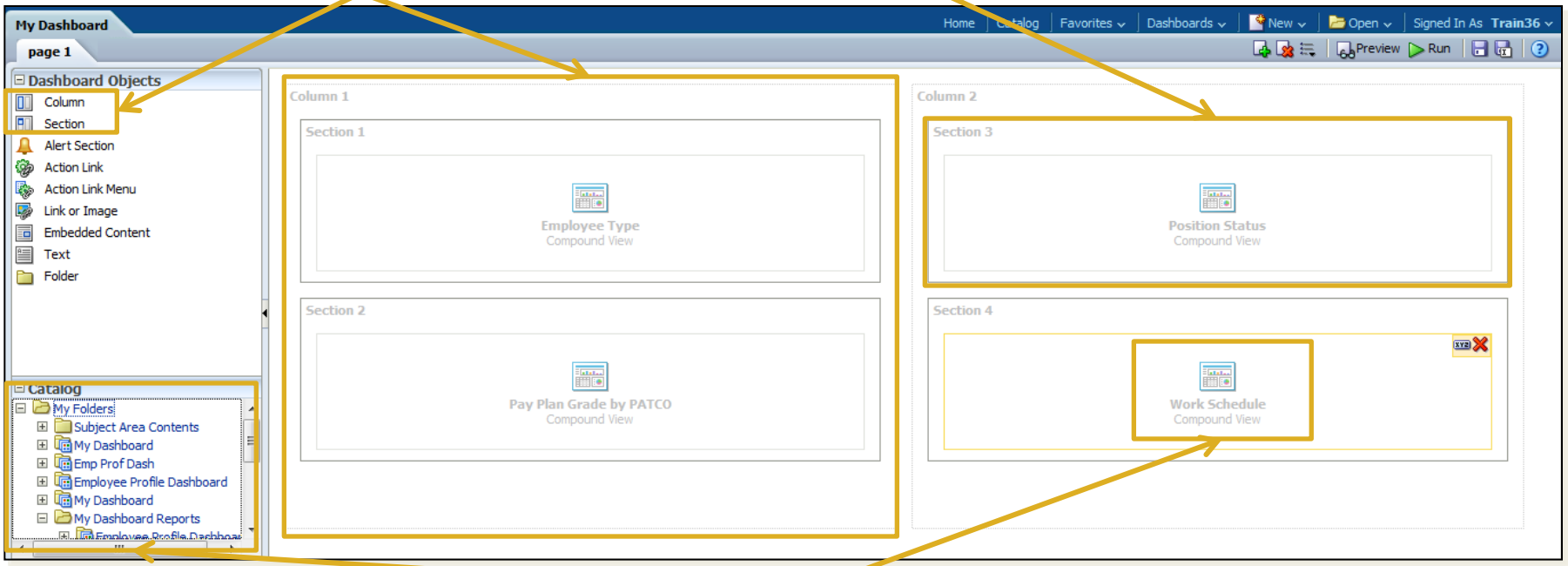
Creating a Dashboard

2 of 3

Customize the design of an ad hoc dashboard by selecting the columns, sections, and text to include in the dashboard. You can also select the display position of reports in the dashboard.

Drag and drop dashboard objects such as columns to the staging area.

Sections divide columns and provide space to add reports.



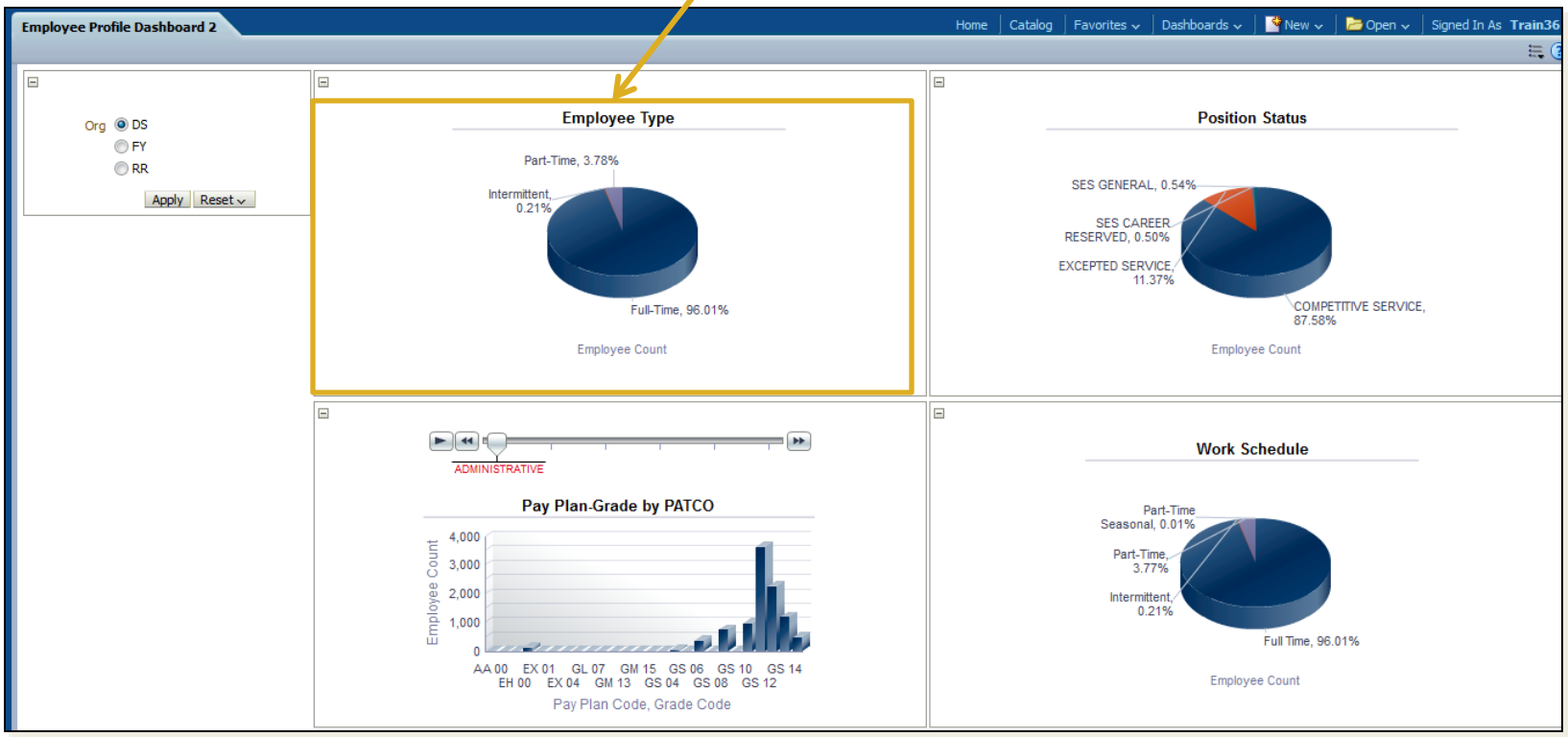
Drag and drop common or ad hoc reports from your catalog to the dashboard panes.

Creating a Dashboard

3 of 3

Previewing the completed dashboard displays all of the reports selected. The formatting of each report, including whether it displays a graph or a table of data, is selected when building the report.

Each report appears as defined in the dashboard setup.



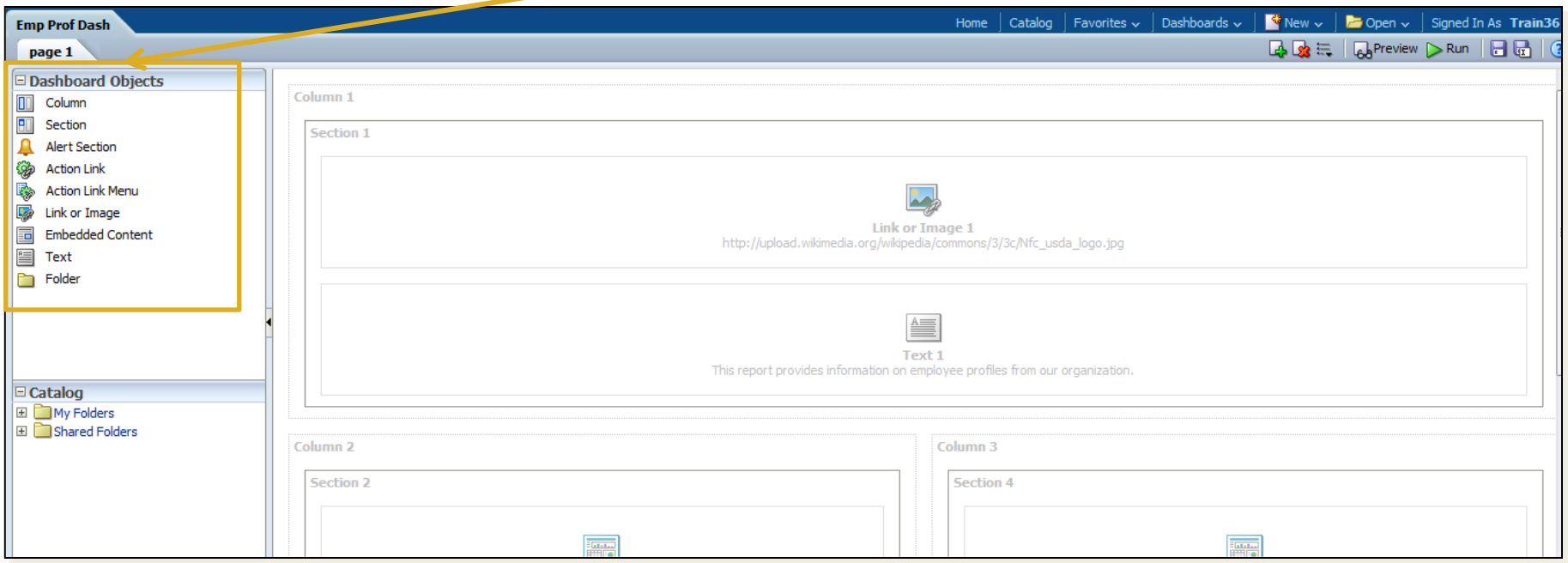
Customizing Dashboards

Customizing Dashboards

1 of 2

Insight provides a number of different options to customize reports and dashboards, which is a great way to put your agency's unique touches on an analysis before printing or sharing.

In addition to reports, *Insight* allows you to include other objects such as images, text boxes, or links to other reports or folders in *Insight.*



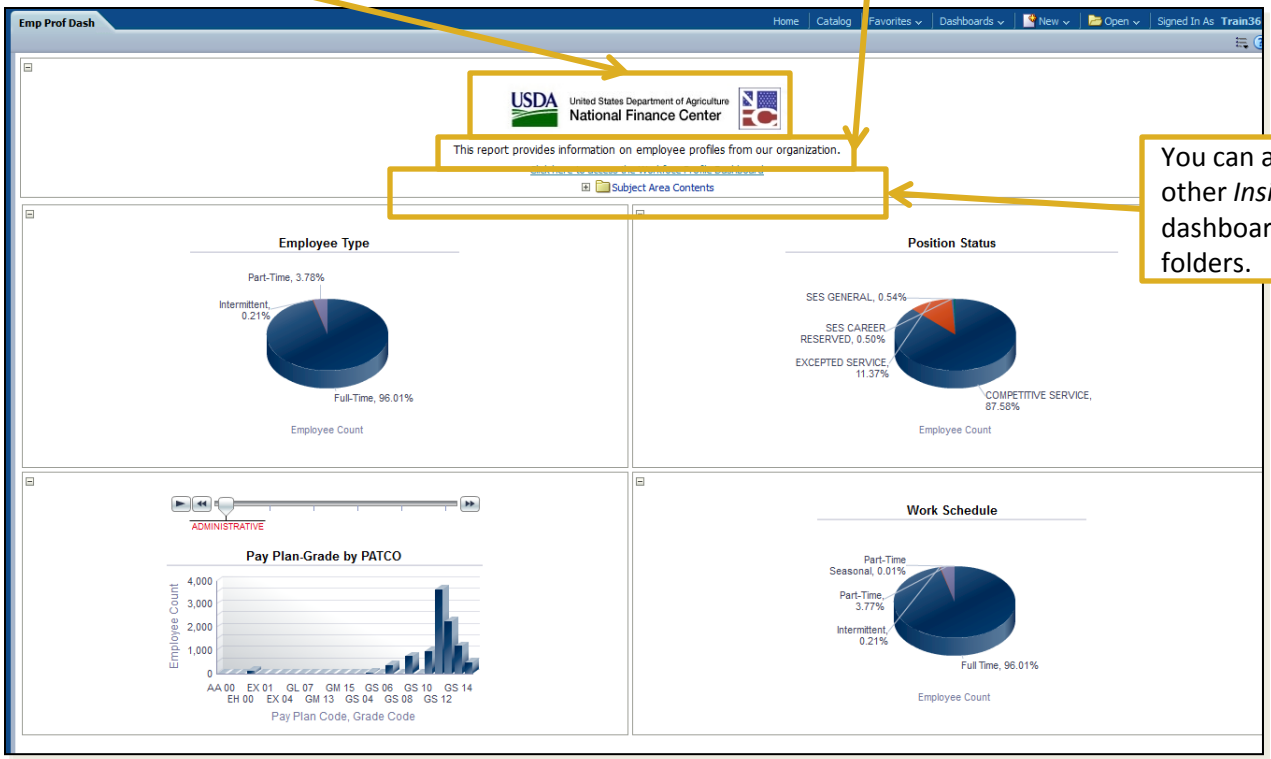
Customizing Dashboards

2 of 2

A customized dashboard can be printed or exported directly from *Insight*, ideal for management or executive review.

Any logo or image with a URL can be added to a dashboard.

An editable text box can be added anywhere on the dashboard.



You can also add links to other *Insight* objects such as dashboards, reports, or full folders.