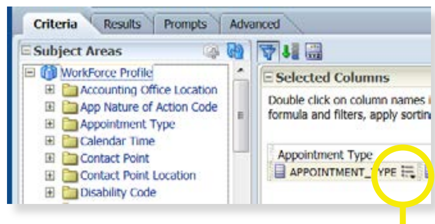
Insight Quick Reference | *Creating Reports and Dashboards*

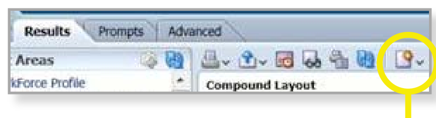
Editing Common Reports and Dashboards

Editing Common Reports

1. Click **Catalog** from the top navigation bar.
2. Expand Shared Folders to navigate to the desired report.
3. Click **Edit** to open the ***ad hoc report editing*** page.
4. In the ***Criteria*** tab, navigate to the ***Selected Columns*** pane.
5. Click the **Edit** icon corresponding to the desired data element to customize the Sort, Column Properties (format styles/appearance), etc.
6. In the ***Results*** tab, click the **New View** icon to add a graph, static text, Filters record, etc.



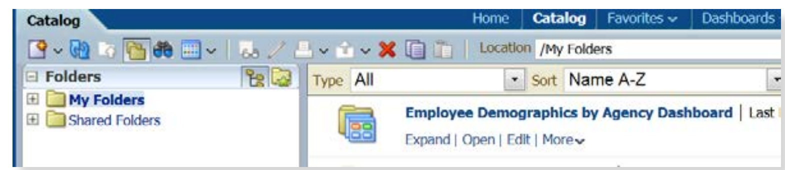
Edit icon



New View icon

Editing Common Dashboards

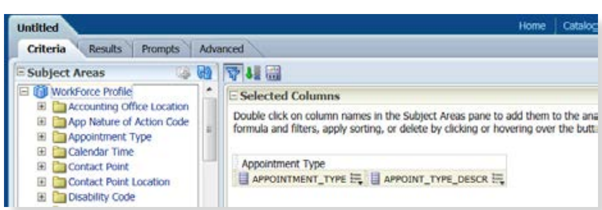
1. Click **Catalog** from the top navigation bar.
2. Expand Shared Folders to navigate to the desired dashboard.
3. Click **Copy** in the ***Task*** pane.
4. Click **Paste** in the ***Task*** pane of My Folders.
5. Click the **Edit** action link beneath the dashboard to open the ***ad hoc dashboard editing*** page.



Creating Ad Hoc Reports and Dashboards

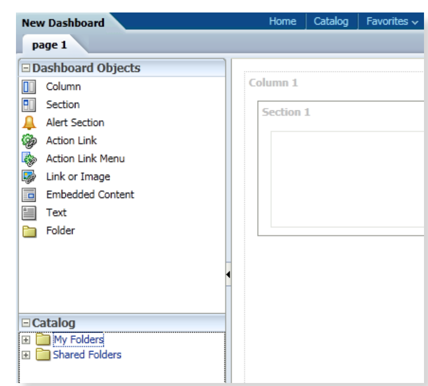
Creating Ad Hoc Reports

1. Click **New** from the top navigation bar, then select **Analysis.**
2. Select the desired Subject Area to open the ***ad hoc report editing*** page.
3. Drag desired data elements from the ***Subject Areas*** pane to the ***Selected Columns*** pane.
4. Navigate to the ***Results*** tab to view the report.



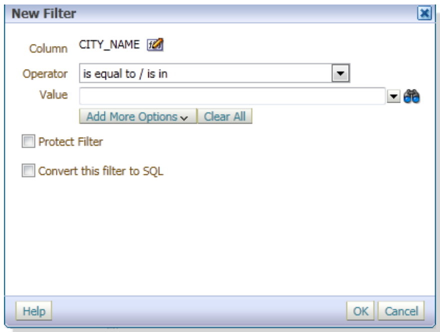
Creating Ad Hoc Dashboards

1. Click **New** from the top navigation bar, then select **Dashboard.**
2. Within the New Dashboard window, name the dashboard and click **Save.**
3. A warning notification will appear. Click **OK**. (The dashboard will not appear in the Dashboards menu, but is accessible through the Catalog.)
4. Use the ***Dashboard Objects*** and ***Catalog*** panes to build the dashboard within the ***Dashboard*** workspace.



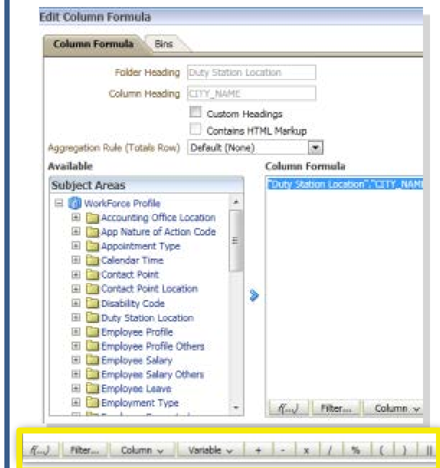
Advanced Features

How to: Create a New Filter



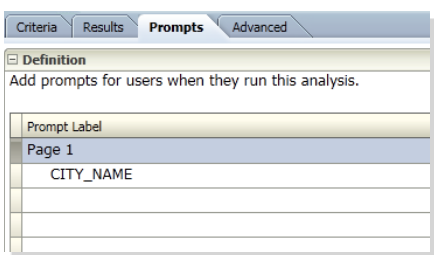
1. From the ***Criteria*** tab of the ***ad hoc report editing*** page, create a filter to restrict data before the report runs.
2. Click the **Filters** icon from the ***Filters*** pane and select the desired data element.
3. View the New Filter window to customize how the filter restricts data in the report, e.g., the Operator (type of restriction applied), Value (what values are displayed), etc.
4. Click **OK**. The new filter is listed within the ***Filters*** pane.

How to: Write Formulas to Customize Data



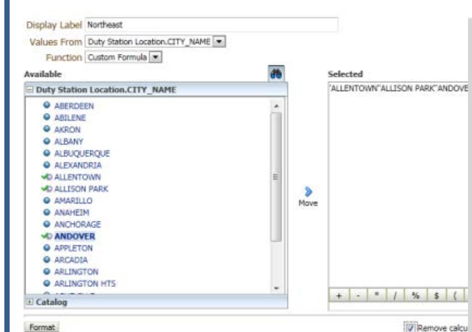
1. From the ***Selected Columns*** pane of the ***Criteria*** tab, click the **Edit** icon corresponding to the desired data element and select **Edit Formula.**
2. Within the Edit Column Formula window, click the **Custom Headings** checkbox to edit the Column Heading title.
3. Click **Column** to choose from a menu of data elements in the ***Selected Columns*** pane to use in the formula.
4. Choose from a menu of icons (e.g., multiply, divide, concatenate, etc.) below the ***Column Formula*** workspace to write a formula.
5. Click **OK**.

How to: Create a New Report Prompt



1. From the ***Prompts*** tab of the ***ad hoc report editing*** page, users can create report prompts to restrict data as the report runs.
2. Click the **New** icon from the Prompts tab navigation bar.
3. Select **Column Prompt**, then select the desired data element.
4. The New Prompt window appears to customize the prompt, e.g., the Label (text next to prompt), Operator, User Input (type of selection users will make) etc.
5. Click **OK**. The prompt is listed within the ***Prompts*** workspace.

How to: Create a New Calculated Item



1. From the ***Results*** tab of the ***ad hoc report editing*** page, select **New Calculated Item**.
2. In the Display Label, assign a name for the grouped values (this name will appear in the report).
3. In the Values From drop-down, select the desired data element.
4. From the Function drop-down menu, select **Sum**.
5. Use the arrow to move the targeted values from Available to Selected.
6. Click the **Remove calculated item members from view** checkbox.
7. Click **OK**.

Insight Quick Reference | Using Reports and Dashboards

Top Navigation Bar

1. **Home:** Accesses the homepage
2. **Catalog:** Accesses the Catalog of folders
3. **Favorites:** Accesses bookmarked reports
4. **Dashboards:** Accesses common dashboards or My Dashboard
5. **New:** Creates a new report/dashboard
6. **Open:** Opens a saved report/dashboard

Catalog Structure

The Insight Catalog is a folder structure that contains a user's personal and shared reports.

Folder Name	*Description*
My Folders	Personal folders accessible to one user
Shared Folders	Shared folders accessible to multiple users
1. Common Report Library	Standard report/dashboard templates
2. *Insight* System Reports	Reports about *Insight* data
3. Shared Across Agencies	Reports from other agencies
4. Agency Folders	Reports from other users within an agency

Key Terms and Icons

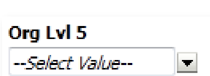
Analysis

An analysis, or report, is a combination of information (e.g., table, text, graphs, etc.) that answers a business question.

Dashboard

A dashboard presents a snapshot of findings across multiple reports with a common theme or purpose.

Prompt



A prompt is a mechanism that restricts data at the time the report or dashboard runs.

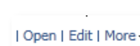
Common Report Library

A set of frequently used government-wide reports that serve as templates for agencies to customize for their specific needs.

Schedule

Schedule is used to program a report to run at a certain time and/or frequency.

Catalog Action Links

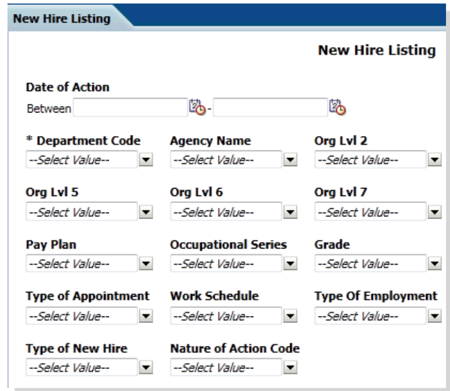


Action links are a set of links under each report or dashboard in the Catalog to conduct actions e.g., open, edit, or copy.

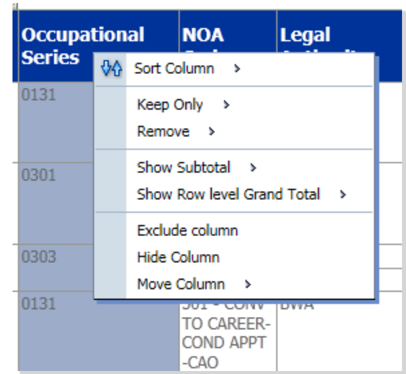
Run a Report

1. Click **Catalog** from the top navigation bar.
2. Expand Shared Folders to navigate through the Common Report Library to select the desired folder.
3. Click **Open** to run the report.
4. Make report prompt selections, then click **OK**.

   Note: Prompts with an asterisk* are required to run the report. Some prompts will cascade based on user selection (e.g., Org Structure). Users should not skip levels if the prompts cascade.



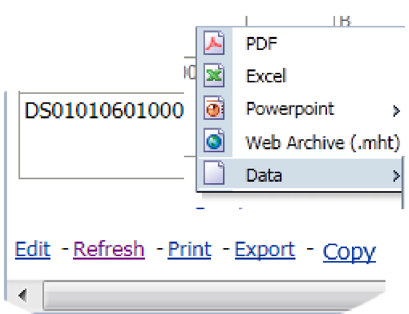
Manipulate a Report



1. In the run view, right-click on the desired column.
2. From the drop-down menu, select to sort the column, show Sub-Total or Grand Total, move the column right/left, to Sections or Table Prompts, etc.

Export and/or Print a Report

1. In the run view, view the series of action links along the bottom of the page.
2. Click **Export** to choose from a menu of options (i.e. PDF, Excel, PowerPoint, etc.).
3. Click **Print** to choose from a menu of options (i.e. PDF, HTML).



Run a Dashboard

1. Click **Dashboards** from the top navigation bar and select the desired dashboard.
2. Use the dashboard prompts at the top of the dashboard page to restrict the data to display.

   Note: Prompts with an asterisk* are required to run the report. After making prompt selections, click in the white space of the dashboard to apply selections.
3. Click **Apply** to update the dashboard.