

# 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
<b>My Folders</b>	Personal folders accessible to one user
<b>Shared Folders</b>	Shared folders accessible to multiple users
1. Common Report Library	Standard report/dashboard templates
2. Insight system Reports	Reports about Insight data
3. Public (Shared Your Reports)	Reports from other agencies
4. Agency Folders	Reports from other users within an agency
5. Password Reset	Access page to change your password

## Key Terms and Icons

### Analysis



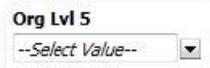
An analysis, or report, is a combination of information (e.g., table, text, graphs, etc.) that answers a business question.

### 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.



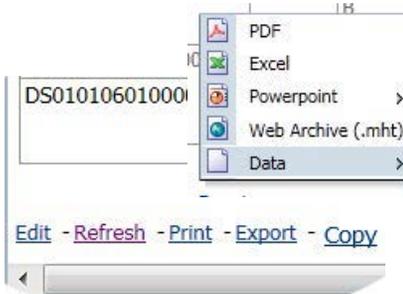
### Manipulate a Report



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

### 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, Web Archive (.mht), 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.