



National Finance Center

U. S. Department of Agriculture

N E W O R L E A N S , L A

National Finance Center

***Insight: Creating Reports and Dashboards
Participant Guide***

May 2013

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1.0. Training Information

1.1. Agenda

Today's training will include the following chapters:

Chapter
2.0 Apply Basic Edits to Common Reports
3.0 Create Ad Hoc Reports
4.0 Customize and Create Ad Hoc Dashboards
5.0 Create Filters and Prompts
6.0 Create Tables and Pivot Tables
7.0 Write Formulas in <i>Insight</i>
8.0 Create Calculated Items
9.0 Create Managerial Reports Using Action Links

1.2. Purpose

Insight: Creating Reports and Dashboards provides an overview of how to customize existing reports and dashboards from the Common Report Library and how to create new ad hoc reports and dashboards.

1.3. Training Objectives

By the end of this course, participants will be able to:

- Demonstrate how to format and make basic edits to common reports
- Demonstrate how to create a new report using basic ad hoc functionality
- Demonstrate how to edit an existing dashboard or create a new dashboard using basic ad hoc functionality
- Demonstrate how to restrict data in reports using filters and prompts
- Demonstrate how to customize reports with tables and pivot tables
- Demonstrate how to customize reports by writing formulas
- Demonstrate how to manipulate data elements using calculated items
- Demonstrate how to create drill-down action links within a report

1.4. Course Materials and Resources

The following course materials are available to assist your learning:

- *Insight*: Creating Reports and Dashboards Reference Card
- *Insight* training sign in information

As you move through this participant guide, be sure to take note of the following icons.

Icon	Meaning or Use
	<p>IMPORTANT: Provides information essential to the completion of a task.</p>
	<p>TIP: Helps users apply the techniques and procedures described in the text to their specific needs. A tip suggests alternative methods that may not be obvious and helps users understand the benefits and capabilities of the product.</p>

Notes:

2.0. Apply Basic Edits to Common Reports

2.1. Chapter Overview

This chapter will review how reports in the Common Report Library can be used as templates for users to customize based on their organization's unique requirements. Customization options include, but are not limited to:

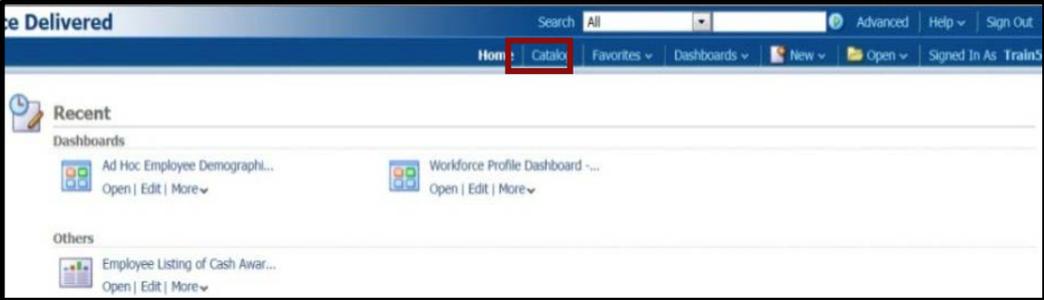
- Editing the look and feel of a report by altering styles and formatting
- Manipulating how data is presented by sorting columns
- Adding contextual pieces such as "Draft" or "Do Not Distribute" to a report

Chapter Objectives

By the end of this chapter, you will be able to:

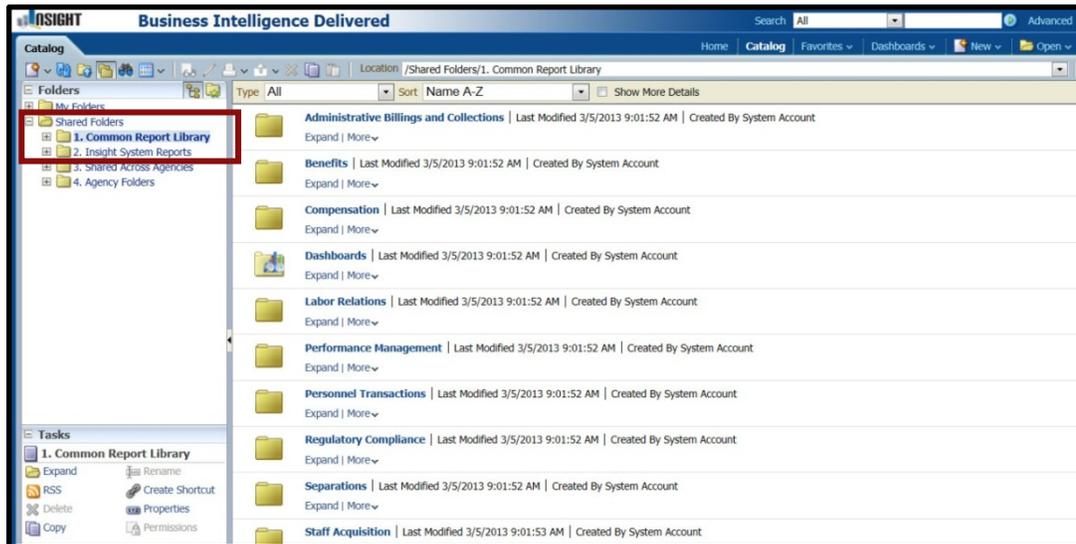
- Demonstrate how to customize the styles and formatting of a report
- Demonstrate how to sort data within a report
- Demonstrate how to add context to an existing report

2.2. Customize the Styles and Formatting of a Report

Step	Action
1.	<p>Click the Catalog action link in the top navigation bar to access the Common Report Library.</p> <p style="text-align: center;"><i>Figure 1: Home Page</i></p>  <p>The screenshot shows a web application interface. At the top, there is a navigation bar with several links: Home, Catalog (highlighted with a red box), Favorites, Dashboards, New, Open, and Signed In As. Below the navigation bar, there is a section titled 'Recent' with two dashboard cards: 'Ad Hoc Employee Demographi...' and 'Workforce Profile Dashboard ...'. Below that, there is an 'Others' section with one card: 'Employee Listing of Cash Awar...'.</p>

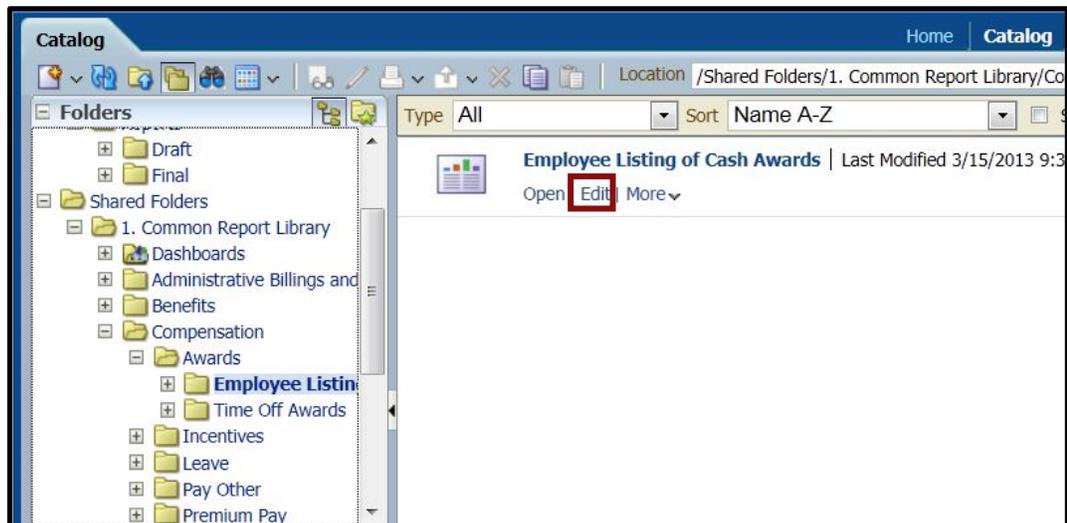
- Expand **Shared Folders** to navigate to the Common Report Library to the desired report.

Figure 2: Common Report Library



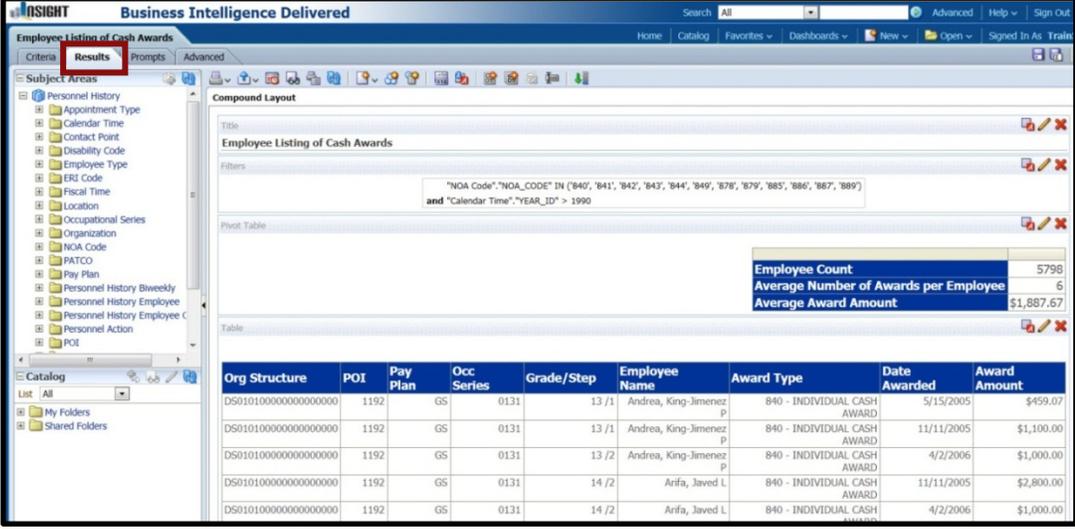
- Click the corresponding **Edit** action link to open the *ad hoc report editing* page.

Figure 3: Report in Common Report Library with Edit Action Link Highlighted



4. View the **Results** tab of the **ad hoc report editing** page.

Figure 4: Report Results Tab

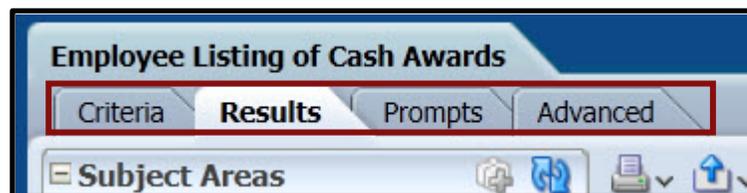


Org Structure	POI	Pay Plan	Occ Series	Grade/Step	Employee Name	Award Type	Date Awarded	Award Amount
DS01010000000000000000	1192	GS	0131	13 /1	Andrea, King-Jimenez P	840 - INDIVIDUAL CASH AWARD	5/15/2005	\$459.07
DS01010000000000000000	1192	GS	0131	13 /1	Andrea, King-Jimenez P	840 - INDIVIDUAL CASH AWARD	11/11/2005	\$1,100.00
DS01010000000000000000	1192	GS	0131	13 /2	Andrea, King-Jimenez P	840 - INDIVIDUAL CASH AWARD	4/2/2006	\$1,000.00
DS01010000000000000000	1192	GS	0131	14 /2	Arifa, Javed L	840 - INDIVIDUAL CASH AWARD	11/11/2005	\$2,800.00
DS01010000000000000000	1192	GS	0131	14 /2	Arifa, Javed L	840 - INDIVIDUAL CASH AWARD	4/2/2006	\$1,000.00

5. View the four tabs of the **ad hoc report editing** page: **Criteria, Results, Prompts, and Advanced.**

- **Criteria:** Allows users to add/remove data elements or “columns” included in the report, apply basic edits such as styles and formatting, filters, sorting, etc.
- **Results:** Allows users to view the result of the selected data elements and formatting in the Criteria tab, add components to the report such as text, tables, and graphs.
- **Prompts:** Provides users with the ability to create report prompts that allow the report consumer to manipulate restrictions on data displayed in the report.
- **Advanced:** Provides users with access to view analysis by XML code, SQL, and SQL clauses.

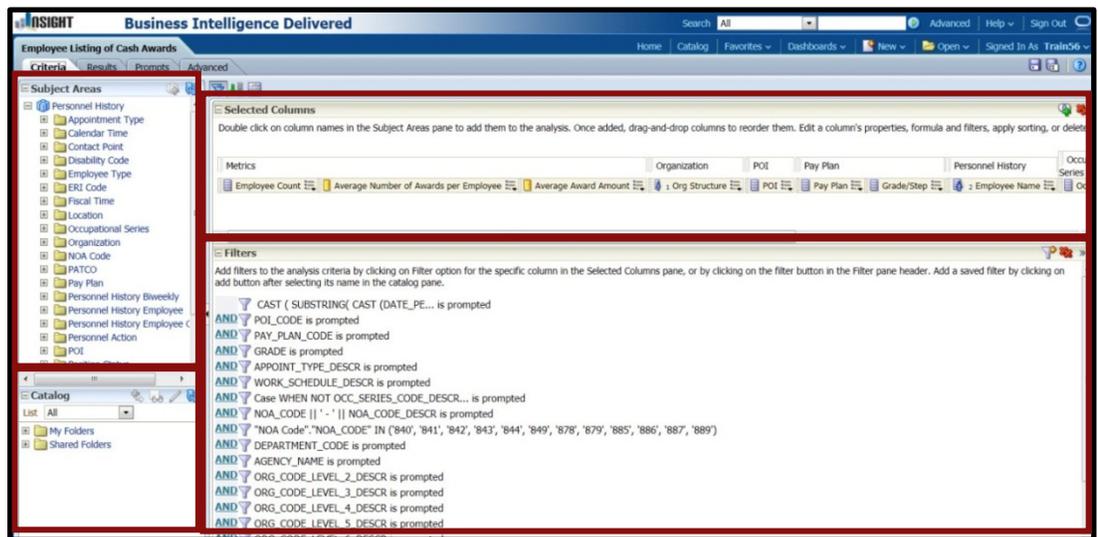
Figure 5: Ad Hoc Report Editing Page Tabs



6. Navigate to the **Criteria** tab to view the following panes:

- **Subject Areas:** Lists the available data elements within that Subject Area.
- **Catalog:** Lists My Folders and Shared Folders containing saved reports, dashboards, filters, prompts, etc.
- **Selected Columns:** Allows users to apply a variety of customizations to each data element included as a column in the report.
- **Filters:** Provides a workspace where new filters will list vertically as they are created.

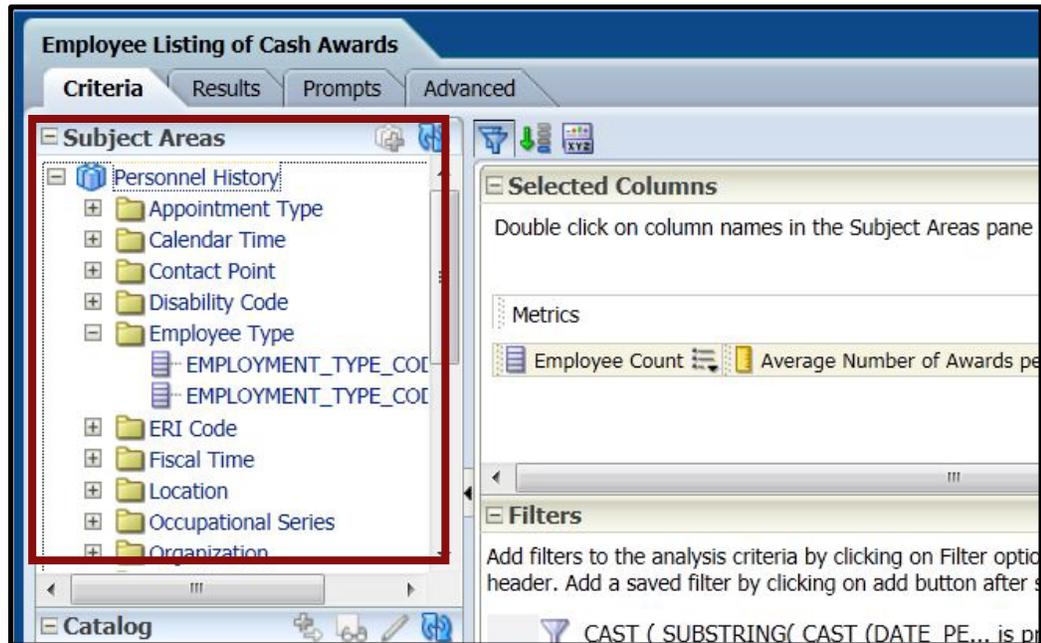
Figure 6: Criteria Tab with Panes Highlighted



Notes:

7. Navigate the folders within the **Subject Areas** pane to view a list of data elements available for report development.

Figure 7: Report Subject Areas Pane

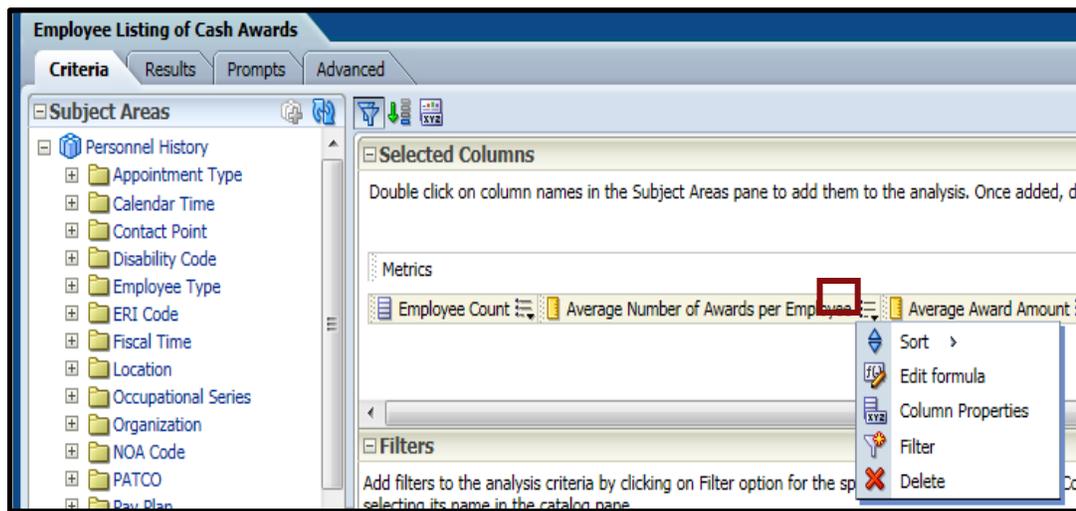


TIP: Users can either double-click or drag and drop a data element from the Subject Areas pane to the Selected Columns pane.

8. Once a data element is in the **Selected Columns** pane, apply customizations by clicking the **Edit** icon for the desired data element.

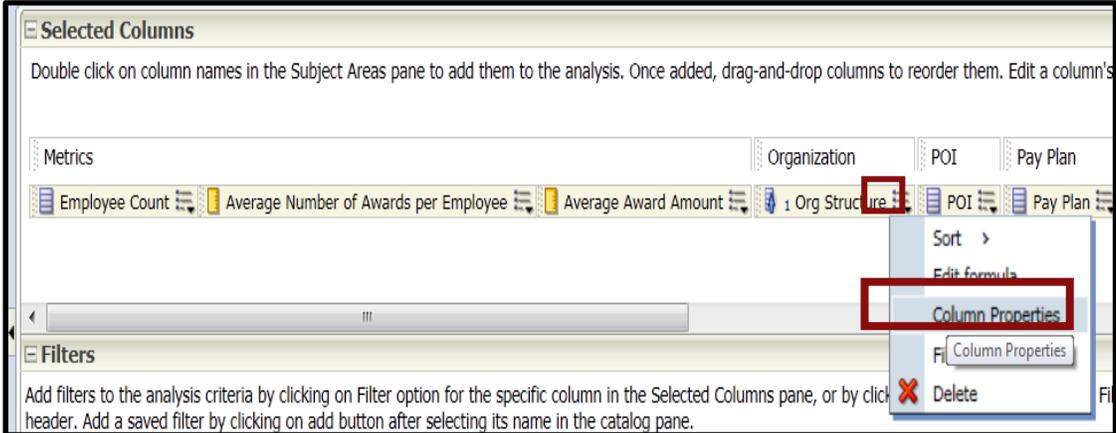
- **Sort:** Sorts the way data is displayed (e.g. ascending, descending, etc.).
- **Edit Formula:** Allows users to create a formula to change how the data in the column appears or to combine columns (e.g., First Name, Last Name = First Name Last Name).
- **Column Properties:** Allows users to visually format the styles and appearance of the column (e.g., font, colors, conditional formatting, etc.).
- **Filter:** Restricts data to a certain data set before the report runs.
- **Delete:** Removes the data element from the Selected Columns pane.

Figure 8: Data Element Edit Icon Drop-Down Menu



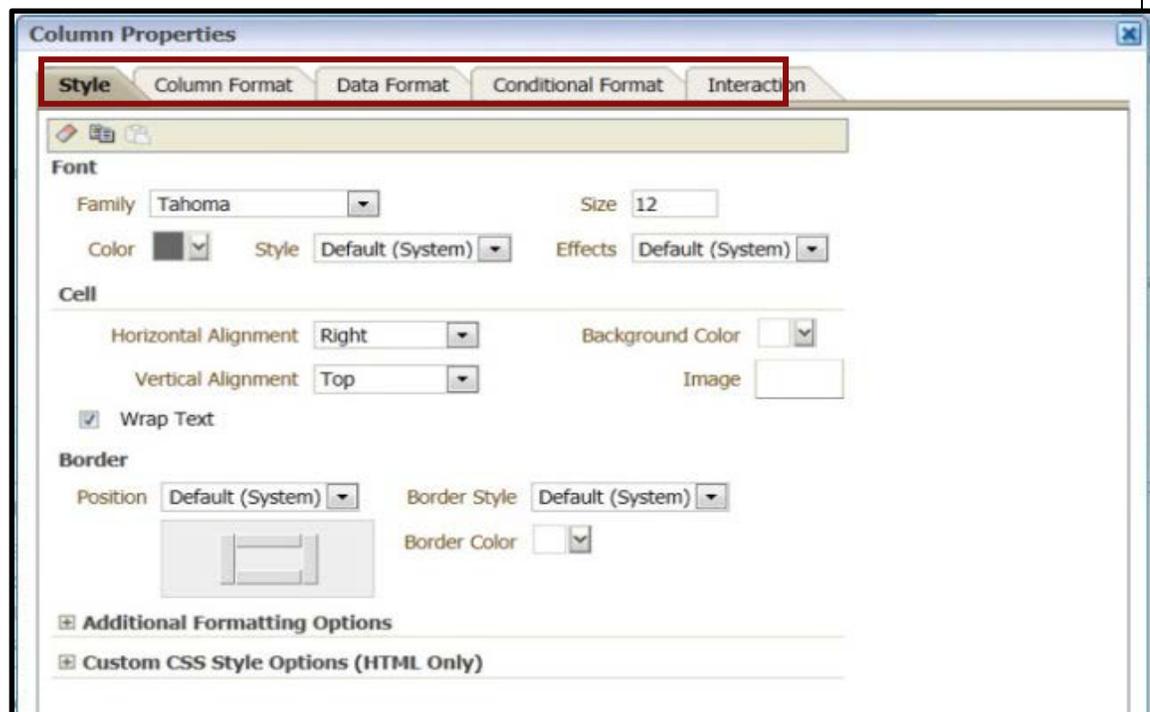
2.3. Edit Column Properties

Apply Edits to Data Elements

Step	Action
1.	<p>Click the Edit icon and select Column Properties from the Selected Columns pane.</p> <p style="text-align: center;"><i>Figure 9: Edit Icon Drop-Down Menu with Column Properties Highlighted</i></p>  <p>The screenshot shows the 'Selected Columns' pane with a list of metrics: Employee Count, Average Number of Awards per Employee, Average Award Amount, 1 Org Structure, POI, and Pay Plan. A red box highlights the edit icon (three vertical lines) for the '1 Org Structure' column. A drop-down menu is open, showing options: Sort, Edit formula, Column Properties (highlighted with a red box), Column Properties (with a filter icon), and Delete.</p> <p>Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the Filter icon in the column header. Add a saved filter by clicking on add button after selecting its name in the catalog pane.</p>

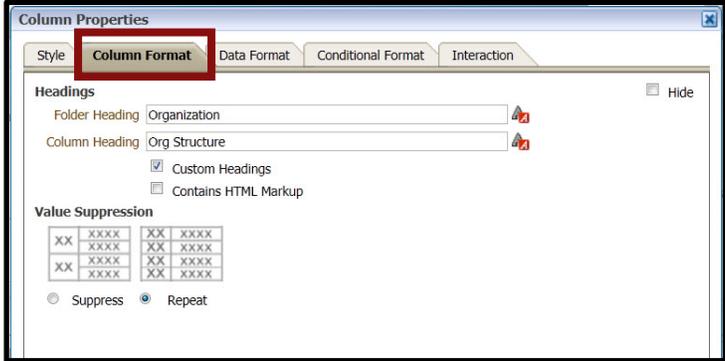
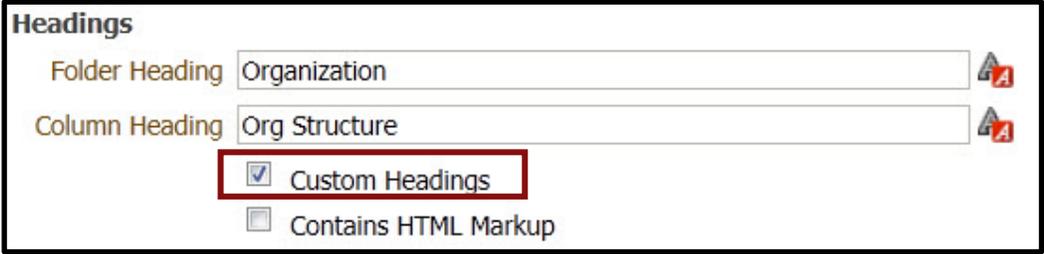
2. View the Column Properties window with five tabs containing options to format the properties of the data element as it appears within the report.
- **Style:** Provides users with a number of options to customize the appearance of fonts, cells, and borders of a column.
 - **Column Format:** Allows users to customize the report column heading and the way data is grouped within columns (e.g., merge common cells or remain separate).
 - **Data Format:** Allows users to customize how the data appears within a report column (e.g., as a number, text, percentage, etc.).
 - **Conditional Format:** Allows users to highlight certain data elements within the column based on a defined condition.
 - **Interaction:** Allows users to add action links to column headings and values.

Figure 10: Column Properties Window Tabs





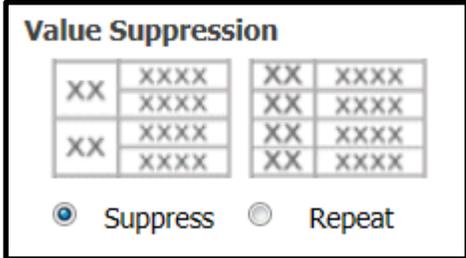
QUICK TIP: Column Format

Step	Action
1.	<p>Navigate to the Column Format tab from the Column Properties window.</p> <p><i>Figure 11: Column Properties Window with Column Format Tab Highlighted</i></p> 
2.	<p>Select the Custom Headings check box to edit the name of a folder or column heading.</p> <p><i>Figure 12: Column Format Tab with Custom Headings Highlighted</i></p> 
3.	<p>Click the Format Heading icon to customize the styles and formatting of the heading.</p>  <p>Format Heading: Displays a menu of options to customize headings or titles in reports.</p>

4. Use the Value Suppression options to choose how to display the relationship between data in the report.

- **Suppress:** Groups data in the first column when it corresponds with multiple values in the second column.
- **Repeat:** Displays the value within the first column each time it corresponds with the value in the second column.

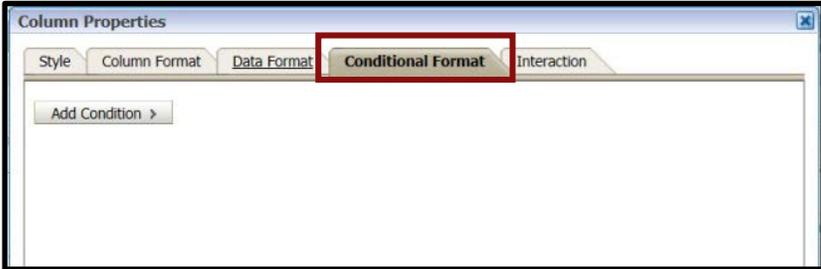
Figure 13: Value Suppression Section of the Column Format Tab



Notes:

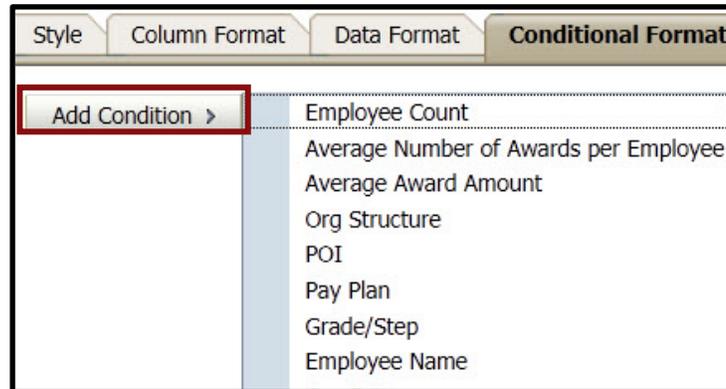


QUICK TIP: Conditional Formatting

Step	Action
1.	Navigate to the Conditional Format tab from the Column Properties window. <i>Figure 14: Column Properties Window with Conditional Format Tab Highlighted</i> 
2.	Click Add Condition to apply conditional formatting to the targeted data

element.

Figure 15: Conditional Format Tab with Add Condition Highlighted

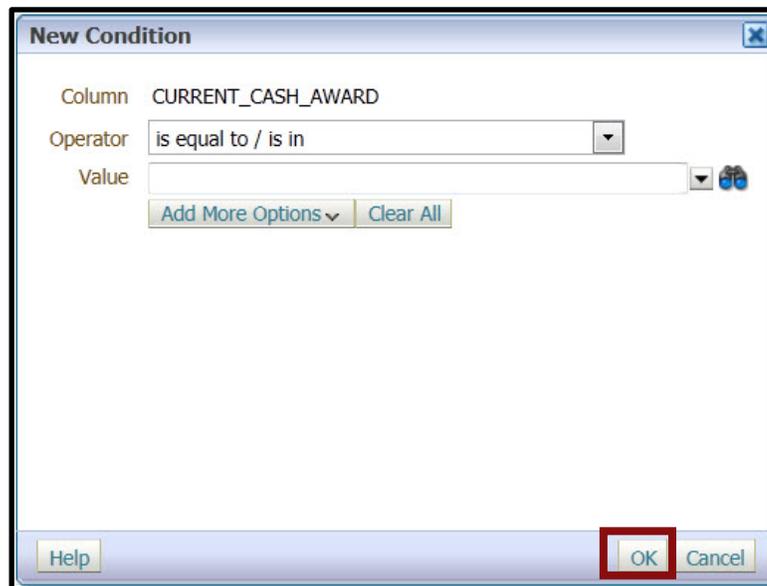


3.

View the New Condition window to customize the conditions and values to highlight. Click **OK**.

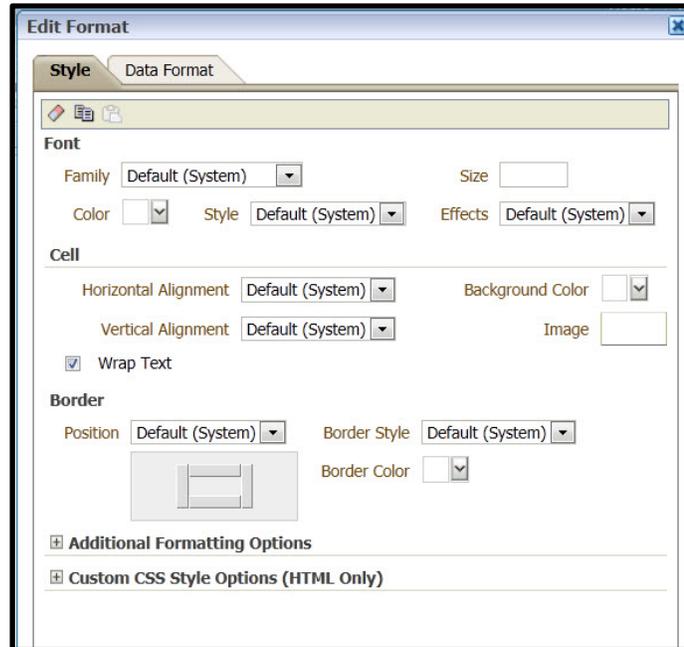
- **Operator:** Determines the type of restriction applied to the report (e.g., is equal to, is greater than, etc.).
- **Value:** Restricts the value of data.

Figure 16: New Condition Window



4. View the Edit Format window to select the styles and formatting (e.g., color, font, border color, etc.) of how the condition will be shown in the report. Click **OK**.

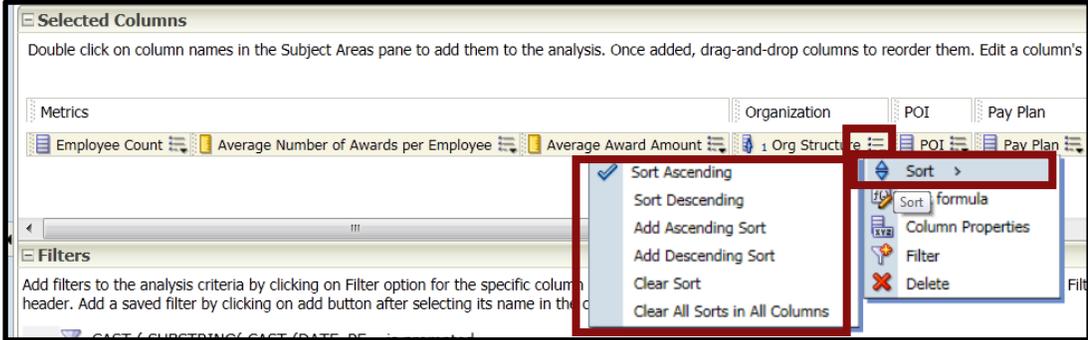
Figure 17: Edit Format Window For Conditional



Notes:

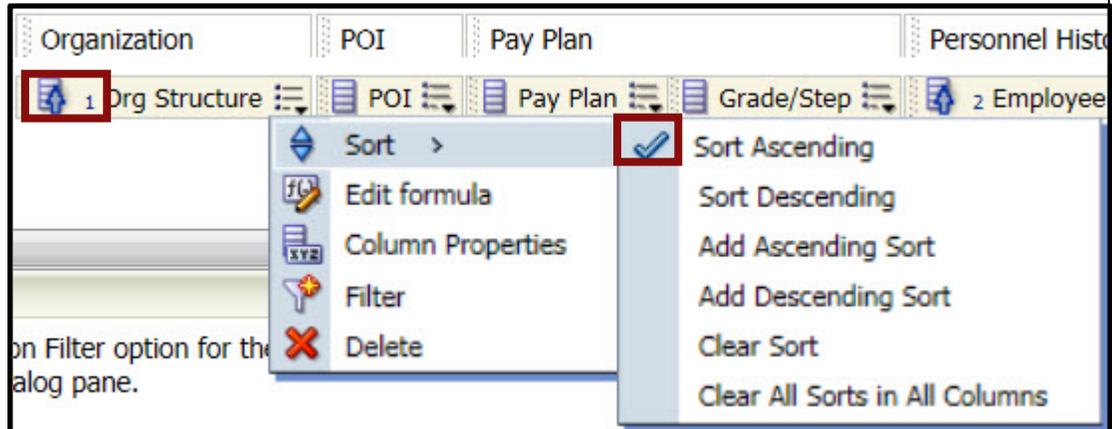
2.4. Sort Data Within a Report

Apply Sorts to One or More Columns

Step	Action
1.	Click the Edit icon for the targeted data element from the <i>Selected Columns</i> pane.
2.	<p>Select Sort in the drop-down menu to select from the available sorting options.</p> <ul style="list-style-type: none"> • Sort Ascending: Allows users to add the first sort in a column in ascending order. • Sort Descending: Allows users to add the first sort in a column in descending order. • Add Ascending Sort: Allows users to add an additional sort to the report that orders the values in ascending order. • Add Descending Sort: Allows users to add an additional sort to the report that orders the values in descending order. • Clear Sort: Clears a sort for that specific column. • Clear All Sorts in All Columns: Clears all sorts in a report. <p><i>Figure 18: Data Element Edit Icon Drop-Down and Sort Drop-Down Menus</i></p> 

3. Select **Sort Ascending** or **Sort Descending** to set the primary sort. The Attribute icon will update indicating the sort and whether it is the primary (1), secondary (2), etc.

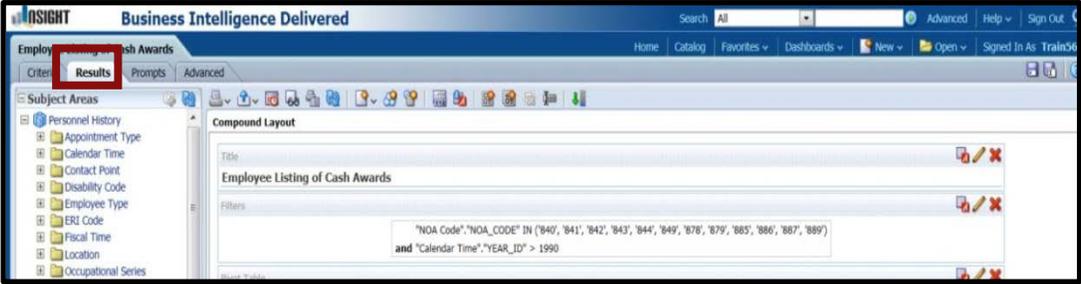
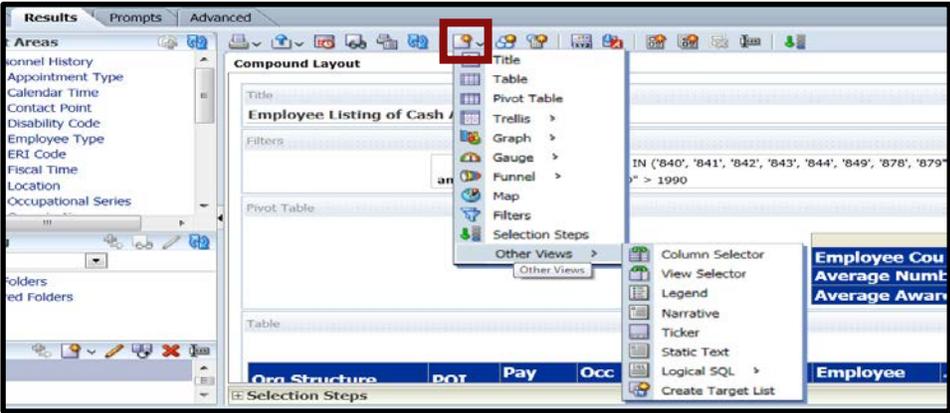
Figure 19: Sort Drop-Down Menu with Attribute Icon Highlighted



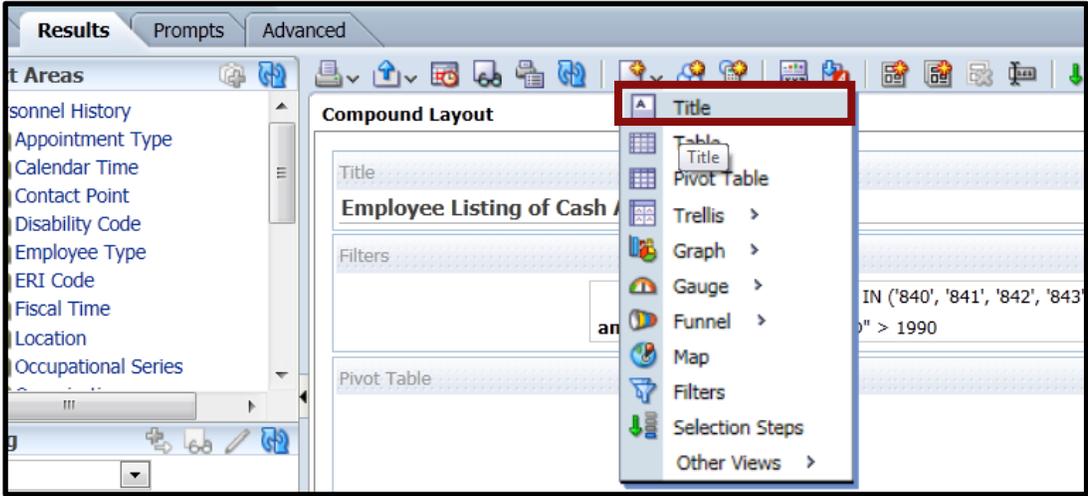
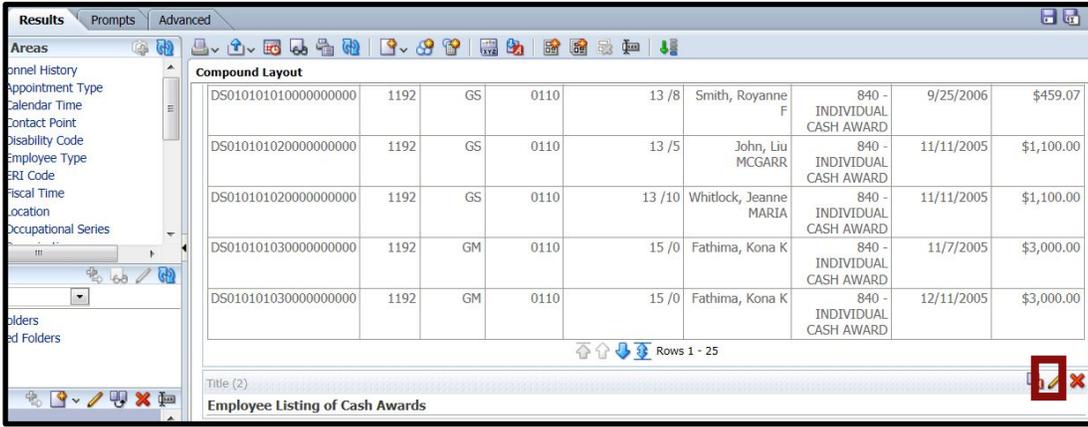
Notes:

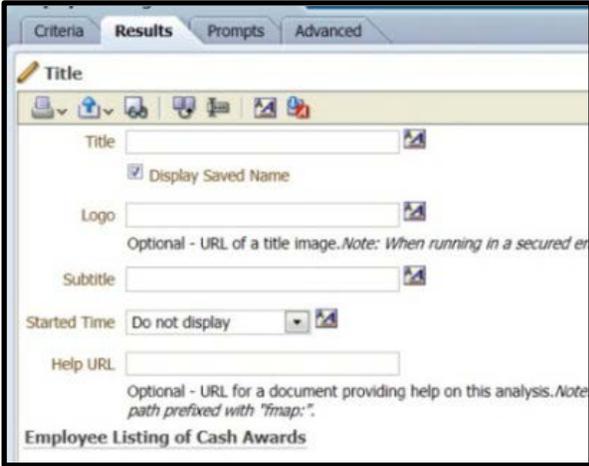
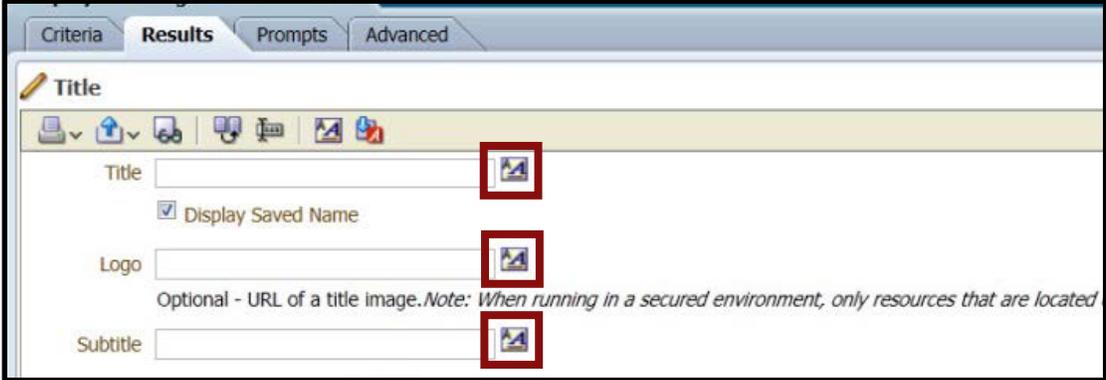
2.5. Add Context to an Existing Report

Add Context Setting Elements to a Report

Step	Action
1.	<p>Navigate to the Results tab of the <i>ad hoc report editing</i> page.</p> <p style="text-align: center;"><i>Figure 20: Results Tab Highlighted</i></p> 
2.	<p>Click the New View icon to view a drop-down menu of additional report components.</p> <ul style="list-style-type: none"> • Title: Adds a title to the report (e.g., Employee Profile Report) and/or indicates the date and time a report is run. • Filters: Records a list of filters applied to the report (e.g., Employee count is greater than 100). • Static Text: Includes a text component to the report (e.g., PII Do Not Distribute). <p style="text-align: center;"><i>Figure 21: New View Drop-Down Menu</i></p>  <p> New View: Displays a menu of additional components (e.g., graph, static text, etc.) to include in a report.</p>

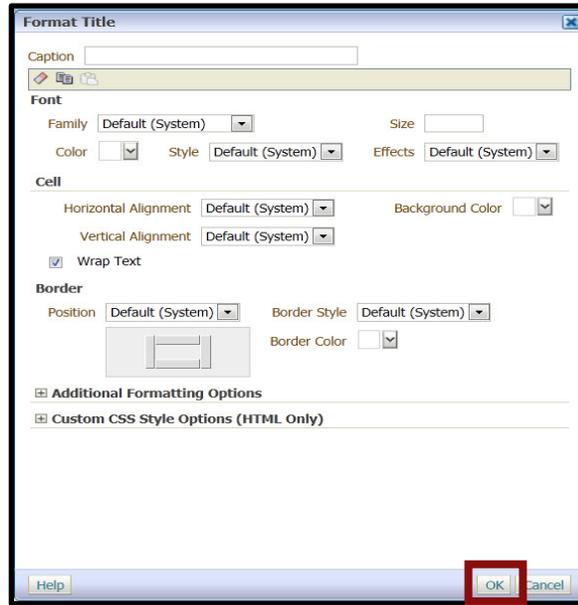
Title View

Step	Action
1.	<p>Select Title from the New View icon drop-down menu.</p> <p style="text-align: center;"><i>Figure 22: New View Drop Down Menu with Title Highlighted</i></p> 
	<p>TIP: When a new view is added to a report, it will automatically list at the bottom of the report. Users can drag and drop report components to any location in the report.</p>
2.	<p>Click the Edit View icon on the corresponding Title component of the report.</p> <p style="text-align: center;"><i>Figure 23: Common Report Title Edit View Icon Highlighted</i></p>  <p> Edit View: Customizes the structure and/or styles of a report component (e.g. title, graph, table, etc.).</p>
3.	View the Title Editing page to change the title of the report, add a logo, sub-

	<p>title, start time, etc.</p> <p style="text-align: center;"><i>Figure 24: Title Editing Page</i></p> 
	<p>IMPORTANT: A preview of the Title appears at the bottom of the page as it will display in the report.</p>
<p>4.</p>	<p>Click the Format Text icon to customize the styles and formatting of any component of the Title (e.g., font, color, etc.).</p> <p style="text-align: center;"><i>Figure 25: Title Editing Page with Format Icon Highlighted</i></p>  <p> Format Text: Allows users to customize the style of text.</p>
	<p>TIP: The Display Saved Name check box will default as selected. Uncheck the box to avoid duplicate titles once the report is saved.</p>

5. View the Format Title window to customize the styles and formatting of the title including font, color, size, etc. Click **OK**.

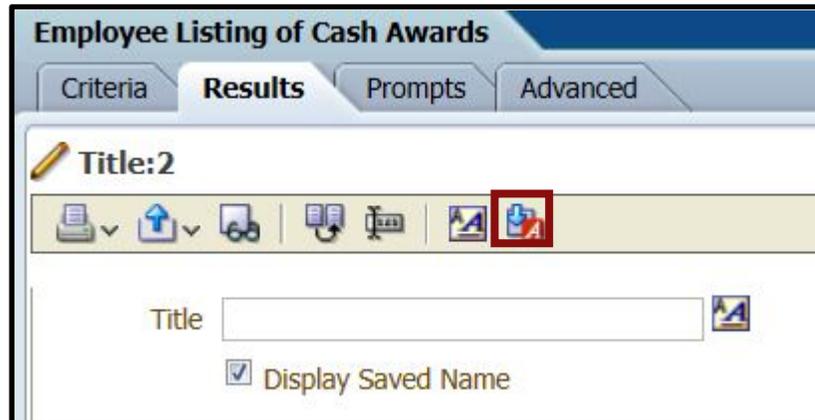
Figure 26: Format Title Window



Notes:

6. Click the **Import Formatting** icon from the Title View navigation bar to apply formatting from an existing report [Refer to Section 0 Apply Formatting From an Existing Report].

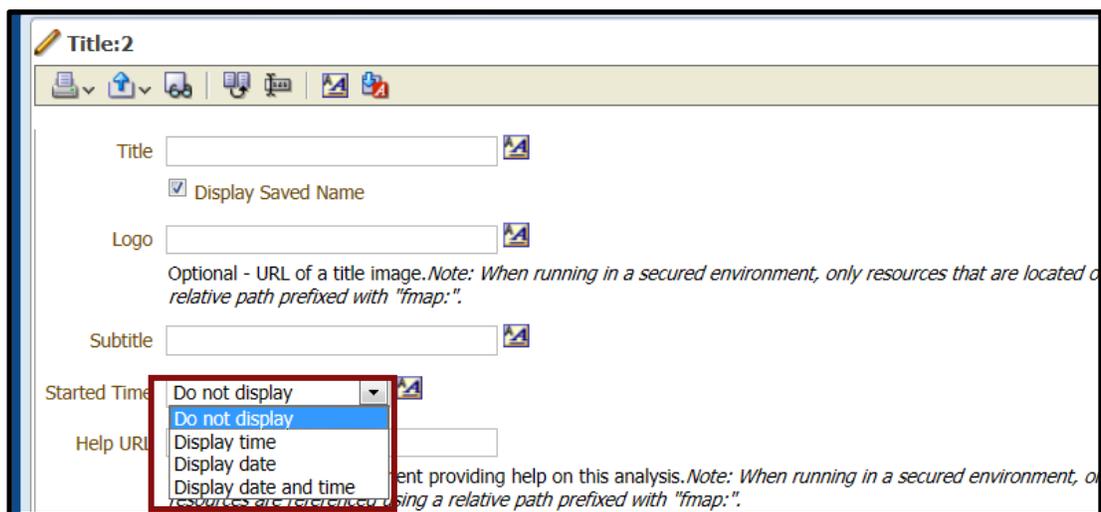
Figure 27: Edit Title Page with Import Formatting Icon Highlighted



Import Formatting: Applies the formatting from an existing report to a new ad hoc report.

7. Select your preferred option from the Started Time drop-down menu to include the report run date and/or time.

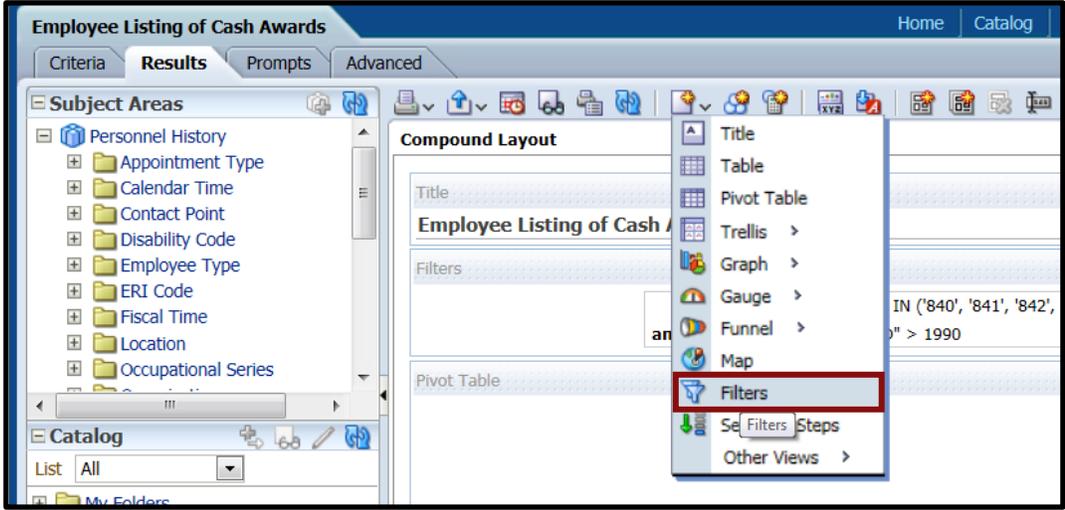
Figure 28: Edit Title Page with Started Time Drop-Down Menu Highlighted

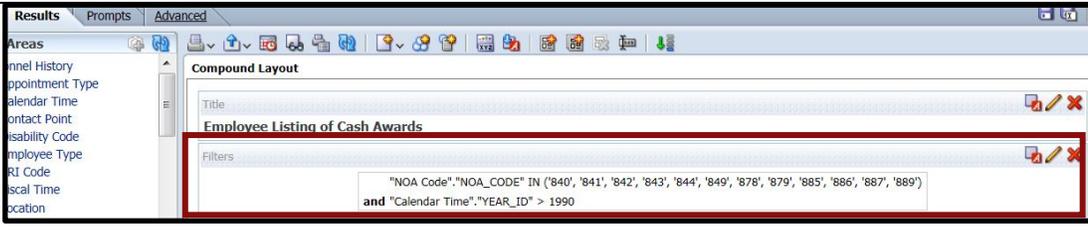


8.	<p>Click the Delete icon from within the report component to remove a title, or any other component of a report.</p> <p>  Delete: Deletes a data element, report component, or dashboard component. </p>
----	---

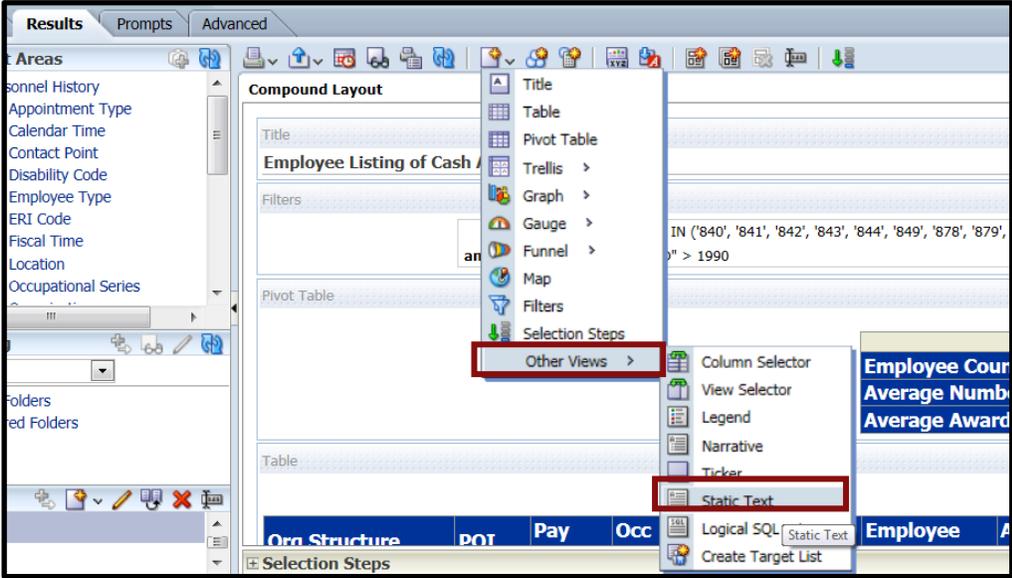
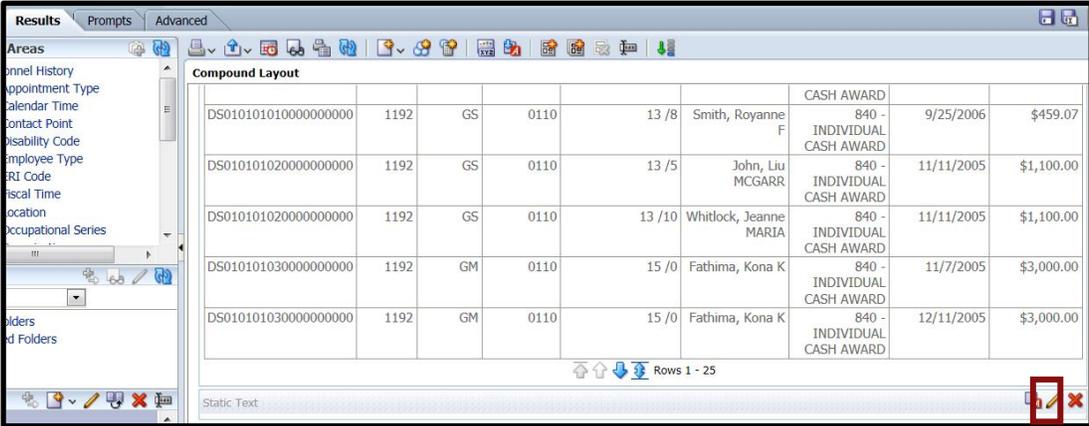
Notes:

Filters Record

Step	Action
1.	<p>Select Filters from the New View icon drop-down menu.</p> <p style="text-align: center;"><i>Figure 29: New View Drop-Down Menu with Filters Highlighted</i></p> 
2.	<p>View the Filters record component of the report. The Filters record will create a vertical list of all filters applied to the report.</p> <p style="text-align: center;"><i>Figure 30: Filters Record</i></p>

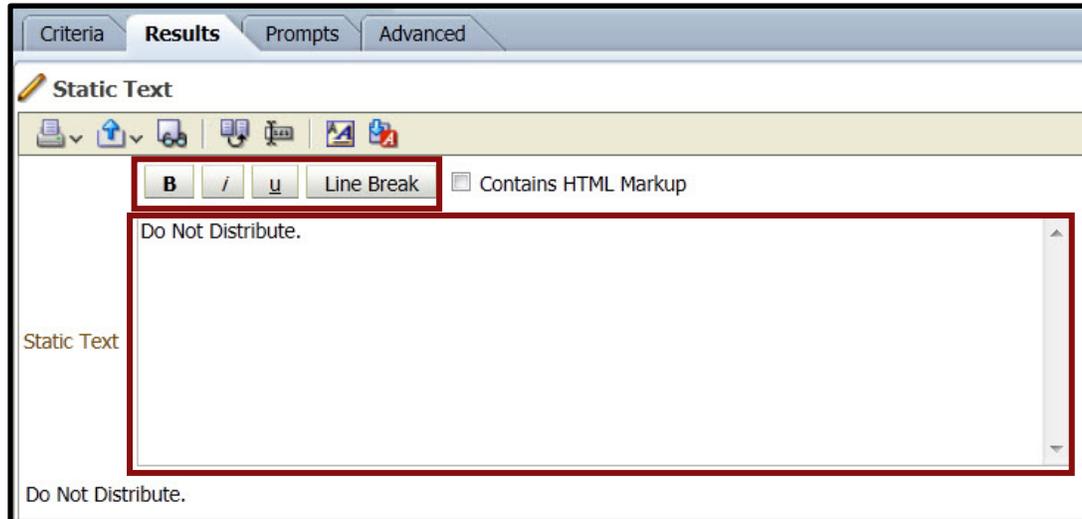
	 <p>Results Prompts Advanced</p> <p>Areas Innel History Appointment Type Calendar Time Contact Point Disability Code Employee Type RI Code iscal Time ocation</p> <p>Compound Layout</p> <p>Title</p> <p>Employee Listing of Cash Awards</p> <p>Filters</p> <p>"NOA Code"."NOA_CODE" IN ('840', '841', '842', '843', '844', '849', '878', '879', '885', '886', '887', '889') and "Calendar Time"."YEAR_ID" > 1990</p>
	<p>IMPORTANT: The Filters record will update based on the filters included in the report as well as any prompt selections made at the time the report runs.</p>

Static Text

Step	Action																																																						
1.	<p>Select Static Text from the New View icon drop-down menu.</p> <p><i>Figure 31: New View Drop-Down and Other View Drop-Down Menus with Static Text Highlighted</i></p> 																																																						
2.	<p>Locate the Static Text component of the report and click the corresponding Edit View icon.</p> <p><i>Figure 32: Static Text with Edit View Icon Highlighted</i></p>  <table border="1" data-bbox="544 1354 1425 1627"> <thead> <tr> <th>Employee ID</th> <th>Grade</th> <th>Pay Plan</th> <th>Position</th> <th>Rate</th> <th>Name</th> <th>Award Type</th> <th>Start Date</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>DS010101010000000000</td> <td>1192</td> <td>GS</td> <td>0110</td> <td>13 / 8</td> <td>Smith, Royanne F</td> <td>CASH AWARD 840 - INDIVIDUAL CASH AWARD</td> <td>9/25/2006</td> <td>\$459.07</td> </tr> <tr> <td>DS010101020000000000</td> <td>1192</td> <td>GS</td> <td>0110</td> <td>13 / 5</td> <td>John, Liu MCGARR</td> <td>840 - INDIVIDUAL CASH AWARD</td> <td>11/11/2005</td> <td>\$1,100.00</td> </tr> <tr> <td>DS010101020000000000</td> <td>1192</td> <td>GS</td> <td>0110</td> <td>13 / 10</td> <td>Whitlock, Jeanne MARIA</td> <td>840 - INDIVIDUAL CASH AWARD</td> <td>11/11/2005</td> <td>\$1,100.00</td> </tr> <tr> <td>DS010101030000000000</td> <td>1192</td> <td>GM</td> <td>0110</td> <td>15 / 0</td> <td>Fathima, Kona K</td> <td>840 - INDIVIDUAL CASH AWARD</td> <td>11/7/2005</td> <td>\$3,000.00</td> </tr> <tr> <td>DS010101030000000000</td> <td>1192</td> <td>GM</td> <td>0110</td> <td>15 / 0</td> <td>Fathima, Kona K</td> <td>840 - INDIVIDUAL CASH AWARD</td> <td>12/11/2005</td> <td>\$3,000.00</td> </tr> </tbody> </table>	Employee ID	Grade	Pay Plan	Position	Rate	Name	Award Type	Start Date	Amount	DS010101010000000000	1192	GS	0110	13 / 8	Smith, Royanne F	CASH AWARD 840 - INDIVIDUAL CASH AWARD	9/25/2006	\$459.07	DS010101020000000000	1192	GS	0110	13 / 5	John, Liu MCGARR	840 - INDIVIDUAL CASH AWARD	11/11/2005	\$1,100.00	DS010101020000000000	1192	GS	0110	13 / 10	Whitlock, Jeanne MARIA	840 - INDIVIDUAL CASH AWARD	11/11/2005	\$1,100.00	DS010101030000000000	1192	GM	0110	15 / 0	Fathima, Kona K	840 - INDIVIDUAL CASH AWARD	11/7/2005	\$3,000.00	DS010101030000000000	1192	GM	0110	15 / 0	Fathima, Kona K	840 - INDIVIDUAL CASH AWARD	12/11/2005	\$3,000.00
Employee ID	Grade	Pay Plan	Position	Rate	Name	Award Type	Start Date	Amount																																															
DS010101010000000000	1192	GS	0110	13 / 8	Smith, Royanne F	CASH AWARD 840 - INDIVIDUAL CASH AWARD	9/25/2006	\$459.07																																															
DS010101020000000000	1192	GS	0110	13 / 5	John, Liu MCGARR	840 - INDIVIDUAL CASH AWARD	11/11/2005	\$1,100.00																																															
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DS010101030000000000	1192	GM	0110	15 / 0	Fathima, Kona K	840 - INDIVIDUAL CASH AWARD	12/11/2005	\$3,000.00																																															

3. Type directly into the **Static Text** workspace, using bold, italics, underline, etc.

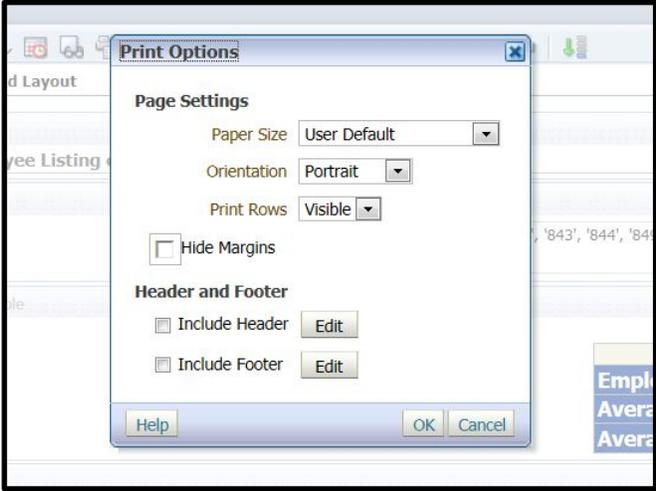
Figure 33: Static View Editing Page with Formatting Features Highlighted



Notes:

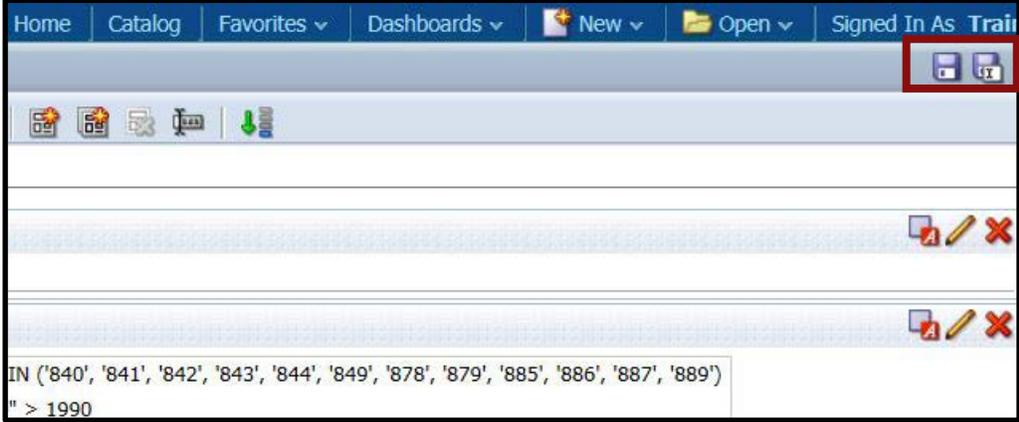


QUICK TIP: Customize Report Print Properties

Step	Action
<p>1.</p>	<p>Click the Print Options icon from the Results tab navigation bar.</p> <p><i>Figure 34: Results Tab Navigation Bar with Print Options Icon Highlighted</i></p>  <p> Print Options: Customizes the print settings for the report.</p>
<p>2.</p>	<p>View the Print Options window to adjust default paper size, change printing orientation, print only visible rows or all rows, hide margins, and include/edit headers and footers in the report.</p> <p><i>Figure 35: Report Print Options Window</i></p> 



QUICK TIP: Save Customizations to a Report

Step	Action
1.	<p>Click the Save icon or Save As icon to save the report.</p> <p style="text-align: center;"><i>Figure 36: Report Save and Save As Icon Highlighted</i></p>  <p>IN ('840', '841', '842', '843', '844', '849', '878', '879', '885', '886', '887', '889') " > 1990</p> <p> Save: Saves the changes made to an existing report or dashboard, or saves the report or dashboard to a particular location.</p> <p> Save As: Provides a new name for a report or dashboard and saves it in the Catalog.</p>

Notes:

2.6. Apply Basic Edits To Common Reports: Exercises

Exercise 2.1: Add Context to a Report

Situation: Gloria’s manager wants a report with the ‘hire effective dates’ of all new hires, to ensure the department is complying with OPM hiring guidelines. The report will include personal information about employees, so Gloria needs to add a disclaimer identifying the information as “FOR INTERNAL USE ONLY”.

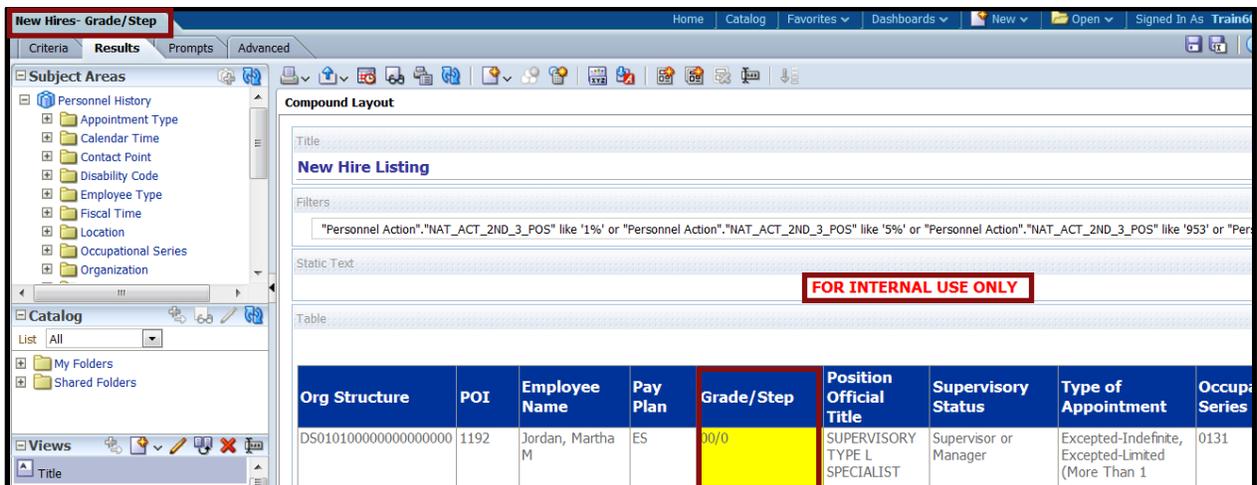
Instructions: Follow the steps below to complete the exercise in *Insight*:

1. Click the **Catalog** action link from the top navigation bar.
2. Expand the **Shared Folders** to navigate to the desired report by expanding the following folders: Shared Folders >> Common Report Library >> Staff Acquisition >> Accessions >> New Hires.
 - a. Click the **New Hires folder** to show folder contents.
3. Click the **Edit** action link corresponding to New Hires.
4. From the **Selected Columns** pane within the **Criteria** tab, click the **Edit** icon corresponding to the following data elements and select Delete.
 - a. Legal Authority
 - b. 2nd Legal Authority
 - c. Service Computation Date
 - d. Hire Effective Date
 - e. Master Record Number
 - f. Pay Rate Determinant
5. From the **Selected Columns** pane within the **Criteria** tab, click the **Edit** icon corresponding to “Grade/Step” and select **Column Properties**.
6. From the **Style** tab of the Column Properties window, navigate to the Background Color drop-down and select **yellow**.
7. Click **OK**.
8. Click the **Results** tab.
9. From the Results tab navigation bar, click the **New View** icon.
10. Select **Other View** then select **Static Text** from the menu of options.
11. Locate the Static Text component of the report and click the **Edit View** icon.

12. Type “FOR INTERNAL USE ONLY” in the Static Text box.
13. Click the **Format Text** icon and change the text to 14 pt. font, red and bold.
14. Click **OK**.
15. Click **Done** to return to the Results tab.
16. Once in the **Results** tab, click the **Save As** icon.
17. Save the report within My Folders as “New Hires – Grade/Step”.

Check Your Work:

Figure 37: Report Save and Save As Icon Highlighted



The screenshot shows a software interface with a 'New Hires- Grade/Step' report. The interface includes a 'Subject Areas' sidebar, a 'Catalog' sidebar, and a main 'Compound Layout' area. The 'Compound Layout' area contains a 'Title' section with 'New Hire Listing', a 'Filters' section with a search string, a 'Static Text' section with 'FOR INTERNAL USE ONLY' (highlighted in a red box), and a 'Table' section. The table has the following data:

Org Structure	POI	Employee Name	Pay Plan	Grade/Step	Position Official Title	Supervisory Status	Type of Appointment	Occup Series
DS010100000000000000	1192	Jordan, Martha M	ES	30/0	SUPERVISORY TYPE L SPECIALIST	Supervisor or Manager	Excepted-Indefinite, Excepted-Limited (More Than 1)	0131

Exercise 2.2: Sort Data in a Report

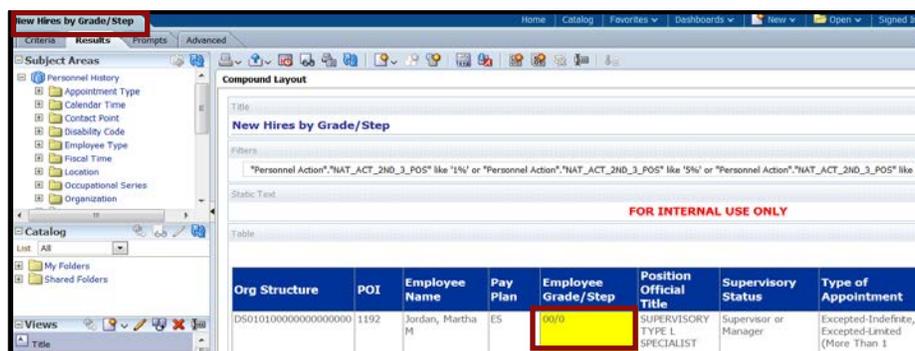
Situation: Gloria’s manager provides feedback on the “New Hires – Grade/Step” report and asks her to make some cosmetic updates.

Instructions: Follow the steps below to complete the exercise in *Insight*:

1. Click the **Catalog** action link from the top navigation bar.
2. Click **My Folders** to locate the “New Hires—Grade/Step” report that was saved in Exercise 1. Click the corresponding **Edit** action link.
3. From the **Selected Columns** pane within the **Criteria** tab, click the **Edit** icon corresponding to the “Grade/Step” data element.
4. Select **Column Properties** and navigate to the Column Format tab.
5. Click **Custom Headings** and edit the Column Heading to be “Employee Grade/Step”.
6. Click **OK**.
7. Click the **Edit** icon corresponding to Pay Plan.
8. Select **Sort** and select **Clear Sort**.
9. Navigate to the **Results** tab and locate the Title.
10. Click the corresponding **Edit View** icon.
11. Edit the title so it reads “New Hires by Grade/Step”.
12. Click **Done**.
13. Click the **Save As** icon and save the report in My Folders as “New Hires by Grade/Step”.

Check Your Work:

Figure 38: Report with For Internal Use Only Disclaimer



Org Structure	POI	Employee Name	Pay Plan	Employee Grade/Step	Position Official Title	Supervisory Status	Type of Appointment
DS010100000000000000	1192	Jordan, Martha M	ES	NO/0	SUPERVISORY TYPE L SPECIALIST	Supervisor or Manager	Excepted-Indefinite, Excepted-Limited (More Than 1

2.7. Chapter Review

Chapter Summary

Having completed this chapter, you should now be able to:

- Demonstrate how to customize the styles and formatting of a report
- Demonstrate how to customize reports with filters
- Demonstrate how to sort data within a report
- Demonstrate how to add context to an existing report

Notes:



U. S. Department of Agriculture
NEW ORLEANS, LA

3.0. Create Ad Hoc Reports

3.1. Chapter Overview

This chapter will review how *Insight's* ad hoc reporting capabilities allow users to create new reports to meet their organization's unique reporting needs. Examples of ad hoc report capabilities include:

- Building a new report
- Editing the structure of a report
- Importing formatting from an existing report to a new report
- Creating, formatting, and editing graphs in reports

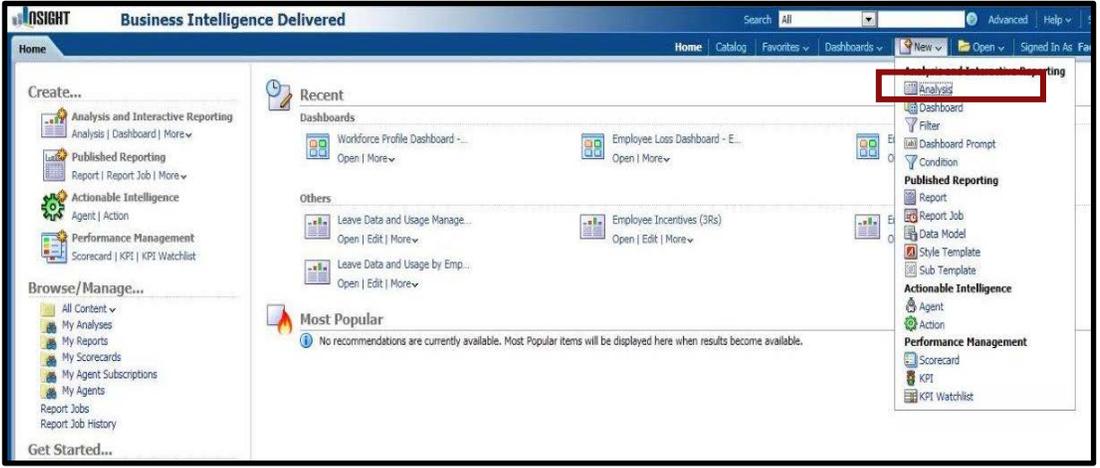
Chapter Objectives

By the end of this chapter, you will be able to:

- Demonstrate how to create a new ad hoc report
- Demonstrate how to apply formatting from an existing report
- Demonstrate how to create and customize a graph within a report

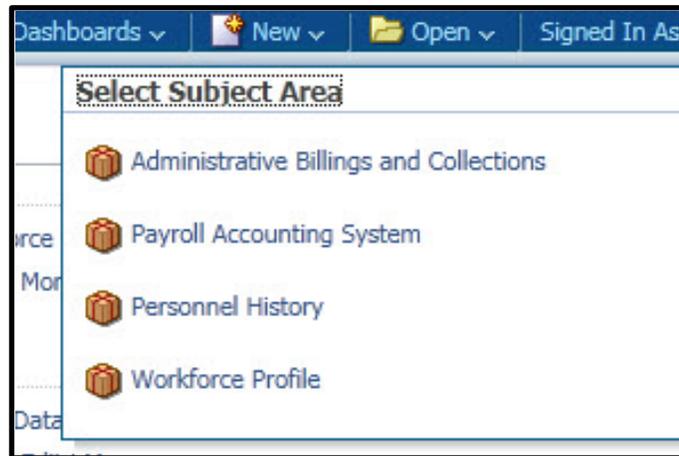
3.2. Create a New Ad Hoc Report

Build an Ad Hoc Report

Step	Action
1.	<p>Click the New action link from the top navigation bar and select Analysis.</p> <p><i>Figure 39: Home Page and New Drop-Down Menu with Analysis Highlighted</i></p> 

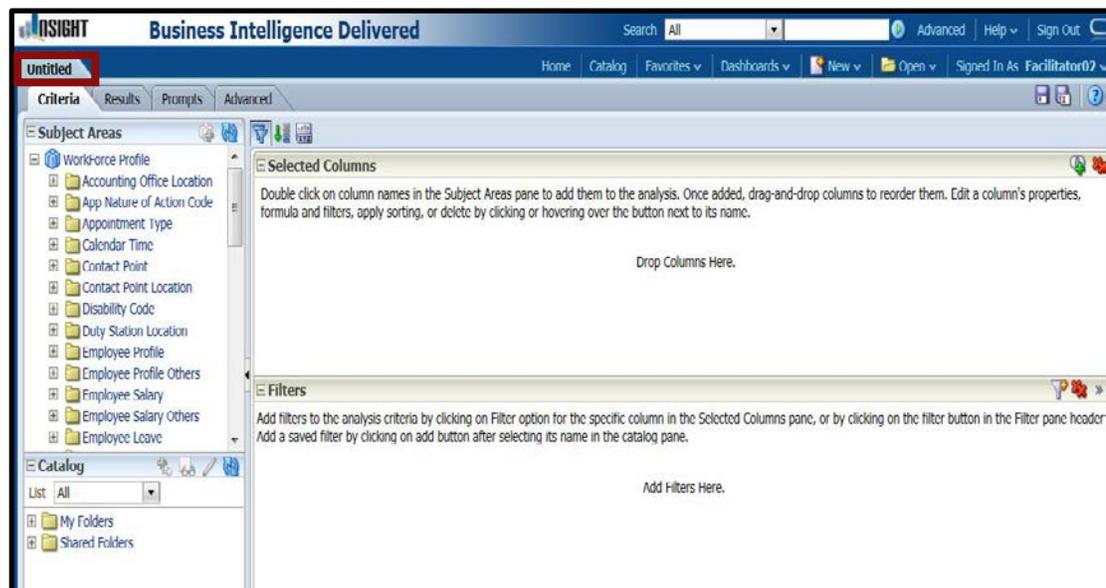
2. Select the desired Subject Area for the ad hoc report.

Figure 40: Subject Area Drop-Down Menu

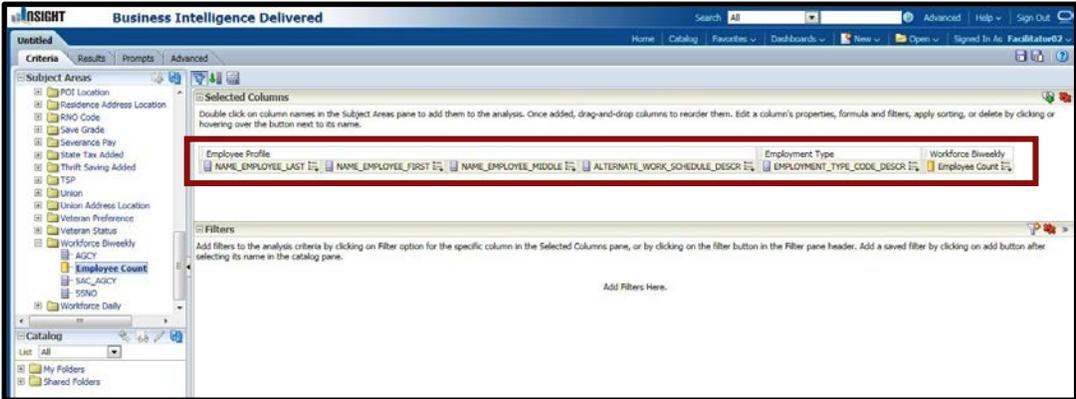
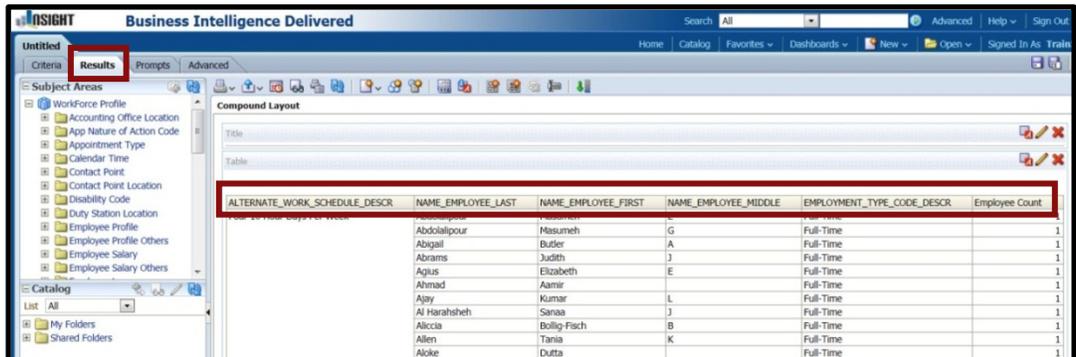


3. View the **ad hoc report editing** page with “Untitled” in the top left tab.

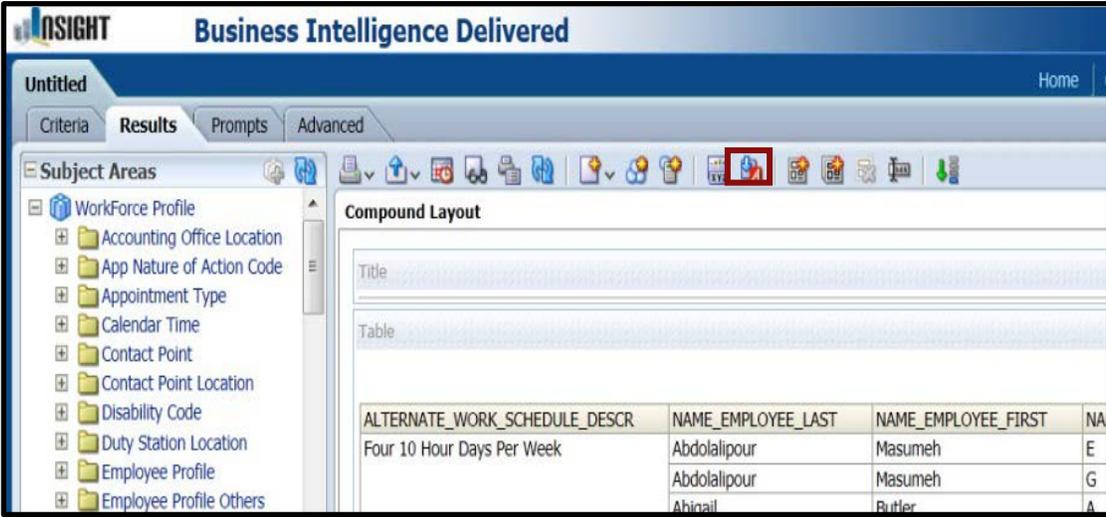
Figure 41: Untitled Highlighted



Add Data Elements to an Ad Hoc Report

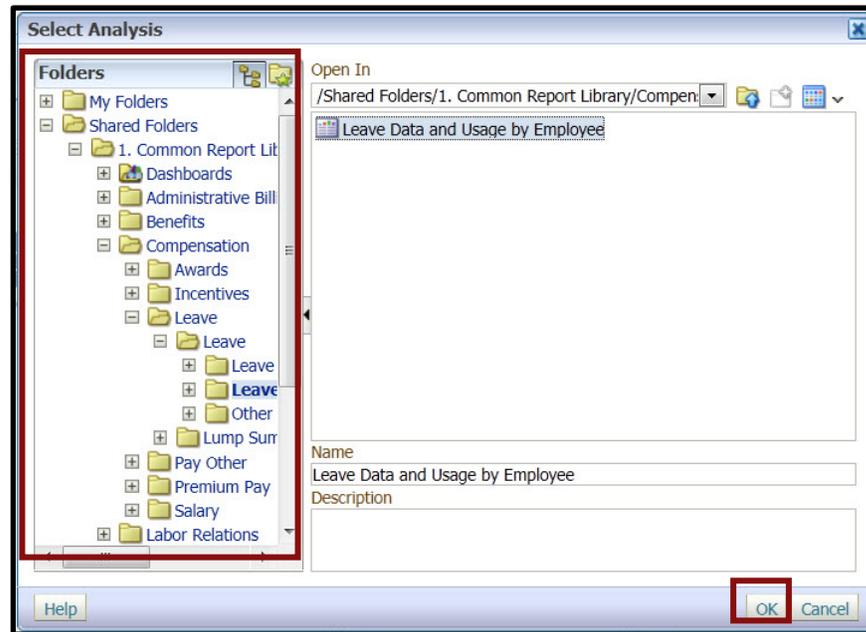
Step	Action																																																																		
1.	<p>Drag and drop data elements from the Subject Areas pane to the Selected Columns pane.</p> <p><i>Figure 42: Report Criteria Tab with Selected Data Elements Highlighted</i></p> 																																																																		
	<p>IMPORTANT: Users can also double-click data elements to move the data element to the Selected Columns pane.</p>																																																																		
	<p>TIP: In order for reports to contain numerical values for totals, graphs, etc., users must include a measure data element (e.g., Employee Count) as one of the data elements in the Selected Columns pane.</p>																																																																		
2.	<p>Navigate to the Results tab of the ad hoc report editing page to view how the data elements will populate in the report.</p> <p><i>Figure 43: Ad Hoc Report Criteria Tab with Selected Data Elements Highlighted</i></p>  <table border="1" data-bbox="560 1564 1404 1732"> <thead> <tr> <th>ALTERNATE_WORK_SCHEDULE_DESCR</th> <th>NAME_EMPLOYEE_LAST</th> <th>NAME_EMPLOYEE_FIRST</th> <th>NAME_EMPLOYEE_MIDDLE</th> <th>EMPLOYMENT_TYPE_CODE_DESCR</th> <th>Employee Count</th> </tr> </thead> <tbody> <tr><td></td><td>Abdoltalpour</td><td>Masumeh</td><td>G</td><td>Full-Time</td><td>1</td></tr> <tr><td></td><td>Abigail</td><td>Butler</td><td>A</td><td>Full-Time</td><td>1</td></tr> <tr><td></td><td>Abrams</td><td>Judith</td><td>J</td><td>Full-Time</td><td>1</td></tr> <tr><td></td><td>Agus</td><td>Elizabeth</td><td>E</td><td>Full-Time</td><td>1</td></tr> <tr><td></td><td>Ahmad</td><td>Aamir</td><td></td><td>Full-Time</td><td>1</td></tr> <tr><td></td><td>Ajay</td><td>Kumar</td><td>L</td><td>Full-Time</td><td>1</td></tr> <tr><td></td><td>Al Harahshesh</td><td>Sanaa</td><td>J</td><td>Full-Time</td><td>1</td></tr> <tr><td></td><td>Aliccia</td><td>Bolly-Fisch</td><td>B</td><td>Full-Time</td><td>1</td></tr> <tr><td></td><td>Allen</td><td>Tania</td><td>K</td><td>Full-Time</td><td>1</td></tr> <tr><td></td><td>Aloke</td><td>Dutta</td><td></td><td>Full-Time</td><td>1</td></tr> </tbody> </table>	ALTERNATE_WORK_SCHEDULE_DESCR	NAME_EMPLOYEE_LAST	NAME_EMPLOYEE_FIRST	NAME_EMPLOYEE_MIDDLE	EMPLOYMENT_TYPE_CODE_DESCR	Employee Count		Abdoltalpour	Masumeh	G	Full-Time	1		Abigail	Butler	A	Full-Time	1		Abrams	Judith	J	Full-Time	1		Agus	Elizabeth	E	Full-Time	1		Ahmad	Aamir		Full-Time	1		Ajay	Kumar	L	Full-Time	1		Al Harahshesh	Sanaa	J	Full-Time	1		Aliccia	Bolly-Fisch	B	Full-Time	1		Allen	Tania	K	Full-Time	1		Aloke	Dutta		Full-Time	1
ALTERNATE_WORK_SCHEDULE_DESCR	NAME_EMPLOYEE_LAST	NAME_EMPLOYEE_FIRST	NAME_EMPLOYEE_MIDDLE	EMPLOYMENT_TYPE_CODE_DESCR	Employee Count																																																														
	Abdoltalpour	Masumeh	G	Full-Time	1																																																														
	Abigail	Butler	A	Full-Time	1																																																														
	Abrams	Judith	J	Full-Time	1																																																														
	Agus	Elizabeth	E	Full-Time	1																																																														
	Ahmad	Aamir		Full-Time	1																																																														
	Ajay	Kumar	L	Full-Time	1																																																														
	Al Harahshesh	Sanaa	J	Full-Time	1																																																														
	Aliccia	Bolly-Fisch	B	Full-Time	1																																																														
	Allen	Tania	K	Full-Time	1																																																														
	Aloke	Dutta		Full-Time	1																																																														

3.3. Apply Formatting From an Existing Report

Step	Action
1.	<p>Click the Import Formatting icon from the Results tab of the ad hoc report editing page.</p> <p><i>Figure 44: Report Tab Navigation Bar with Import Formatting Icon Highlighted</i></p> 
	<p>IMPORTANT: This option applies formatting to all the components of a report. The text from the report will also be imported (e.g., if the static text from an existing report reads “PII”, then when the formatting is imported the new static text will also read “PII”).</p>

- Use the Select Analysis window to navigate to the **Folders** pane and select the report with the desired format. Click **OK**.

Figure 45: Select Analysis Window with Folders Pane Highlighted



- View the updated report with applied formatting (e.g., font styles, colors, data format, etc.) from the selected report.

Figure 46: Ad Hoc Report with Imported Formatting

Compound Layout

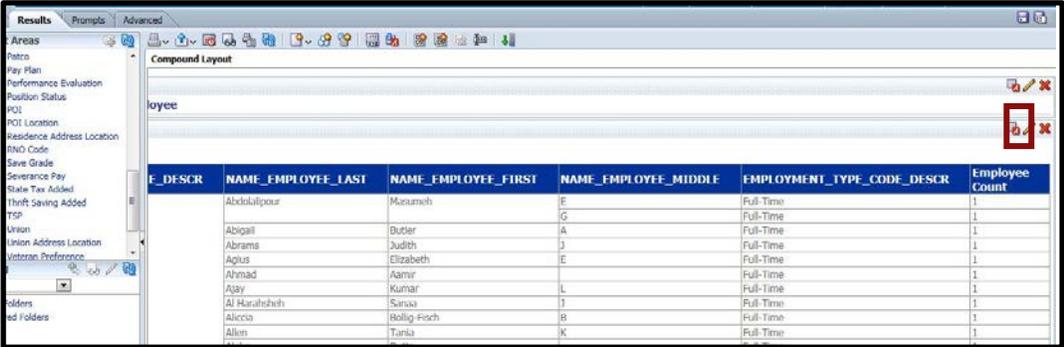
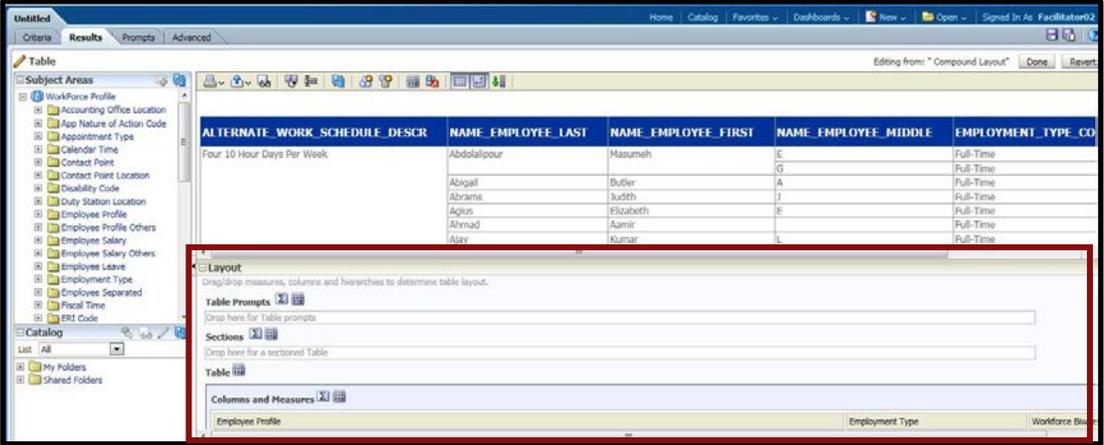
Title
Leave Data and Usage by Employee
Untitled

Table

ALTERNATE_WORK_SCHEDULE_DESCR	NAME_EMPLOYEE_LAST	NAME_EMPLOYEE_FIRST	NAME_EMPLOYEE_MIDDLE	EMPLOYE
	Abigail	Butler	G	Full-Time
	Abrams	Judith	A	Full-Time
	Agius	Elizabeth	J	Full-Time
	Ahmad	Aamir	E	Full-Time
	Ajay	Kumar	L	Full-Time
	Al Harahsheh	Sanaa	J	Full-Time

3.4. Customize Report Structure

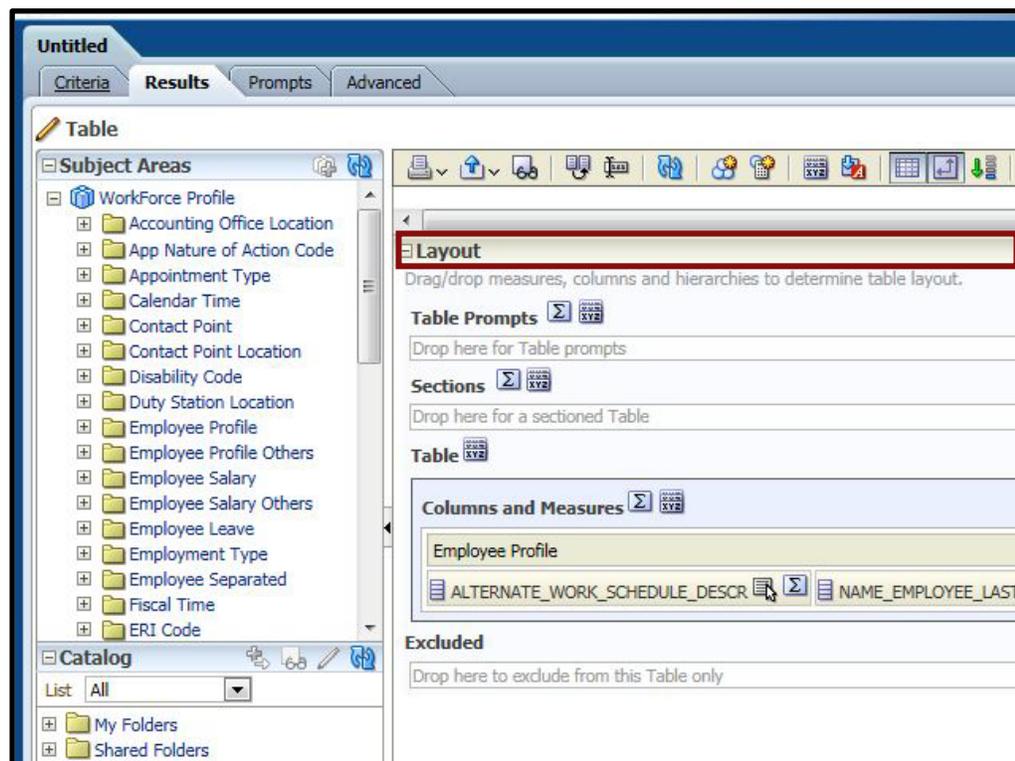
Navigate to the Layout Pane

Step	Action
1.	<p>Click the Edit View icon corresponding to the table from the Results tab of the ad hoc report editing page.</p> <p style="text-align: center;"><i>Figure 47: Ad Hoc Table Edit View Icon Highlighted</i></p> 
2.	<p>View the Layout pane which provides users with a number of ways to customize the structure of a report.</p> <p style="text-align: center;"><i>Figure 48: Partial View of the Table Layout Pane</i></p> 

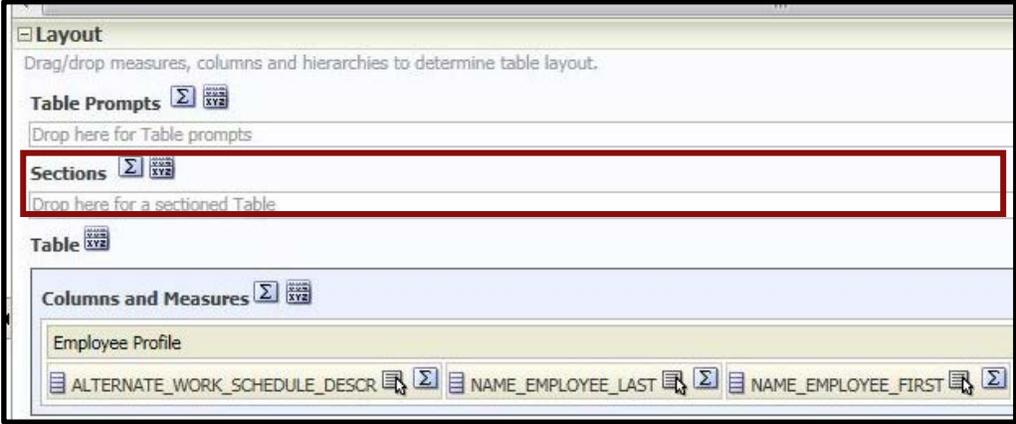
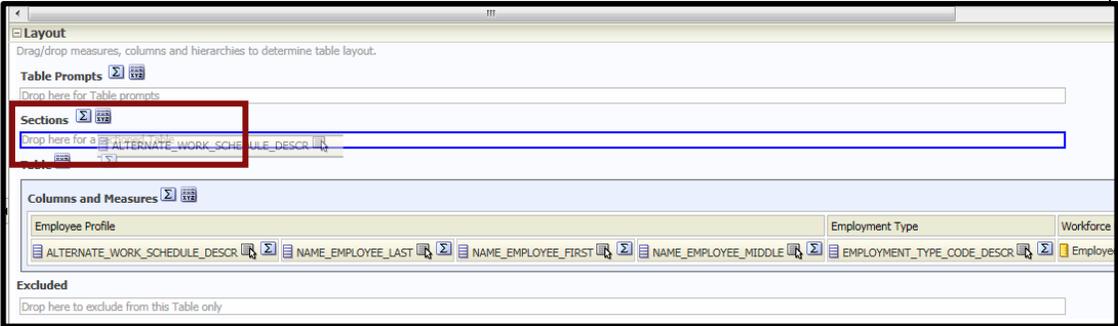
3. Expand the **Layout** pane by clicking the gray bar along the top and dragging up. This will reveal the remaining contents of the **Layout** pane.

- **Table Prompts:** Creates a drop-down menu to allow users to manipulate how data is restricted in a report by toggling between values.
- **Sections:** Separates the report table into individual segments based on a specific data element.
- **Table:** Edits the styles and formatting of the table (cell color, borders, etc.).
- **Columns and Measures:** Adds sums and formats headings/values, etc.
- **Excluded:** Temporarily removes columns from appearing in the table (data elements will remain in the Selected Columns pane in the Criteria tab).

Figure 49: Complete View of the Table Layout Pane

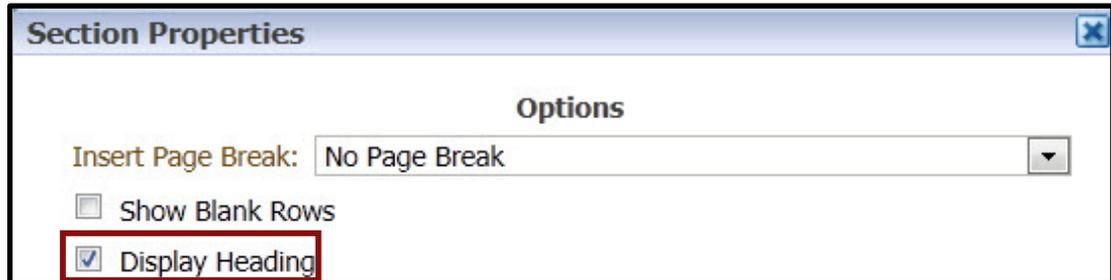


Create Sections

Step	Action
1.	<p>Navigate to Sections on the Layout pane. This allows users to create multiple tables that are defined by a particular data element.</p> <p><i>Figure 50: Table Layout Pane with Sections Highlighted</i></p>  <p>The screenshot shows the 'Layout' pane with several sections: 'Table Prompts', 'Sections' (highlighted with a red border), 'Table', and 'Columns and Measures'. The 'Columns and Measures' section contains a table named 'Employee Profile' with columns: 'ALTERNATE_WORK_SCHEDULE_DESCR', 'NAME_EMPLOYEE_LAST', and 'NAME_EMPLOYEE_FIRST'.</p>
2.	<p>Drag and drop a data element from Columns and Measures to Sections.</p> <p><i>Figure 51: Sections in Layout Pane</i></p>  <p>The screenshot shows the 'Layout' pane with the 'Sections' section highlighted in red. A blue highlight bar is visible over the 'ALTERNATE_WORK_SCHEDULE_DESCR' column in the 'Columns and Measures' section, indicating it is being dragged. The 'Columns and Measures' section now includes additional columns: 'NAME_EMPLOYEE_MIDDLE', 'EMPLOYMENT_TYPE_CODE_DESCR', and 'Employee'.</p>
	<p>TIP: As you drag items to new positions in the Layout pane, the blue highlight bar will indicate the new position once you drop the item.</p>
3.	<p>Click the Properties icon to open the Section Properties window within Sections.</p> <p> Properties: Displays a menu of options to format a component of a report or dashboard. Options will vary depending on the type of component a user is editing.</p>

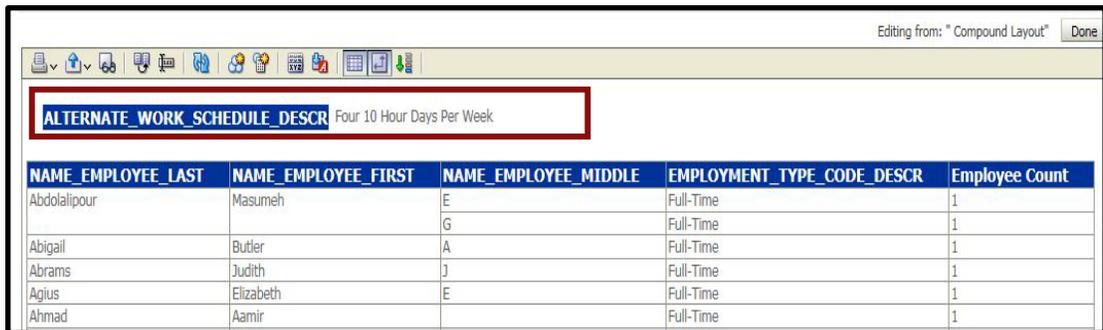
4. Click the **Display Heading** check box to display the data element name in the section title.

Figure 52: Section Properties Window with Display Heading Highlighted



5. View the new Sections heading.

Figure 53: Table with New Section Heading Highlighted

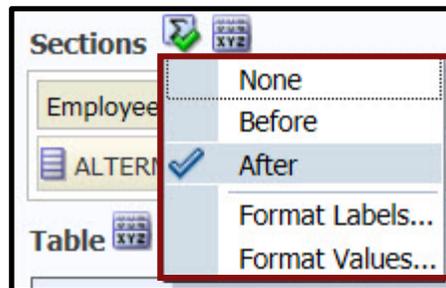


The screenshot shows a table editor interface. At the top, there is a toolbar and a status bar that says "Editing from: 'Compound Layout' Done". Below the toolbar, a section heading "ALTERNATE_WORK_SCHEDULE_DESCR Four 10 Hour Days Per Week" is highlighted with a red box. Below the heading is a table with the following data:

NAME_EMPLOYEE_LAST	NAME_EMPLOYEE_FIRST	NAME_EMPLOYEE_MIDDLE	EMPLOYMENT_TYPE_CODE_DESCR	Employee Count
Abdolalipour	Masumeh	E	Full-Time	1
		G	Full-Time	1
Abigail	Butler	A	Full-Time	1
Abrams	Judith	J	Full-Time	1
Agius	Elizabeth	E	Full-Time	1
Ahmad	Aamir		Full-Time	1

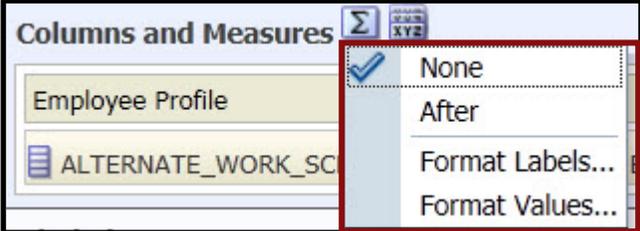
6. Click the Sections Totals icon to view a menu of options that add and customize Totals in Sections.
- **None:** Defaults without a summary table.
 - **Before:** Adds a summary table to a report before the Sections.
 - **After:** Adds a summary table to a report after the Sections.
 - **Format Labels:** Allows users to customize the label caption or apply stylistic formatting (e.g., font, color, etc.) to distinguish labels.
 - **Format Values:** Allows users to customize the stylistic formatting (e.g., font, color, etc.) to distinguish the values associated with the sum.

Figure 54: Sections Totals Drop-Down Menu



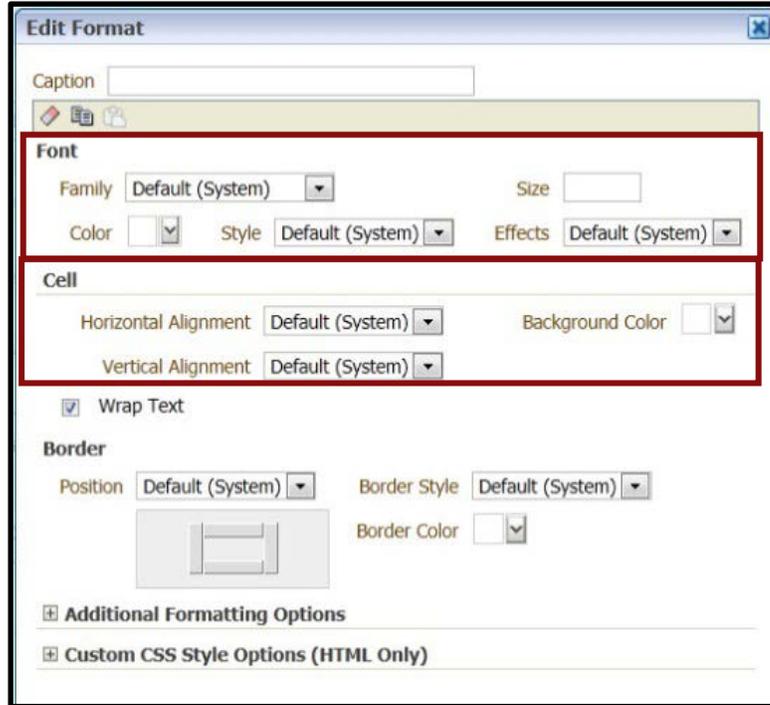
Totals: Displays a menu of options to apply Sub-Totals and/or Grand Totals in a table.

Apply Columns and Measures to a Report

Step	Action
1.	<p>Navigate to the Columns and Measures section from the Layout pane. Within this section, a user can customize Totals for the overall table or for a specific data element.</p> <p style="text-align: center;"><i>Figure 55: Columns and Measures Section of the Layout Pane</i></p> 
	<p>IMPORTANT: By adding Totals at the Columns and Measures section, users can apply a Grand Total; Applying Totals at the data element level applies Sub-Totals for an individual data element.</p>
2.	<p>Click the Totals icon next to the Columns and Measures title to add a Grand Total to the table and format the styles and formatting of both the Grand Total labels and values.</p> <ul style="list-style-type: none"> • None: Defaults without a Grand Total in the table. • After: Adds a Grand Total to the final row in a table. • Format Labels: Allows users to customize the label caption or apply stylistic formatting (e.g., font, color, etc.) to distinguish labels. • Format Values: Allows users to customize stylistic formatting (e.g., font, color, etc.) to distinguish the values associated with the Grand Total. <p style="text-align: center;"><i>Figure 56: Columns and Measures Totals Drop-Down Menu</i></p> 
	<p>IMPORTANT: Totals functionality can only be used if there is a measure data element in the report.</p>
3.	<p>Click the Totals icon and select Format Labels. The Edit Format window</p>

appears, allowing users to update the caption and formatting of the Grand Total label.

Figure 57: Totals Edit Format Window



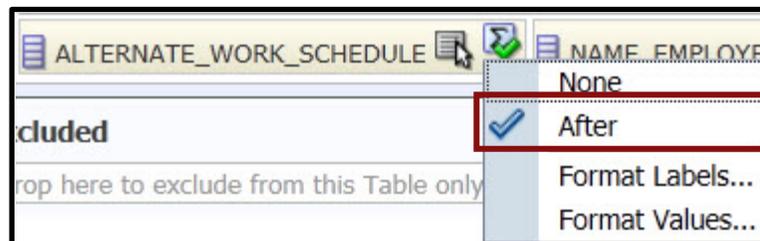
4. The report will update with the Grand Total at the end of the table.

Figure 58: Formatted Grand Total in the Table

	Zhou	YanDong
	Zhou	Zhixian
	Zolondek	Corey
	Zwolinski	Cynthia
Grand Total		

5. Click the **Totals** icon adjacent to the targeted data element and select **After** to apply Sub-Totals following each data element.

Figure 59: Columns and Measures Totals Drop-Down with After Highlighted

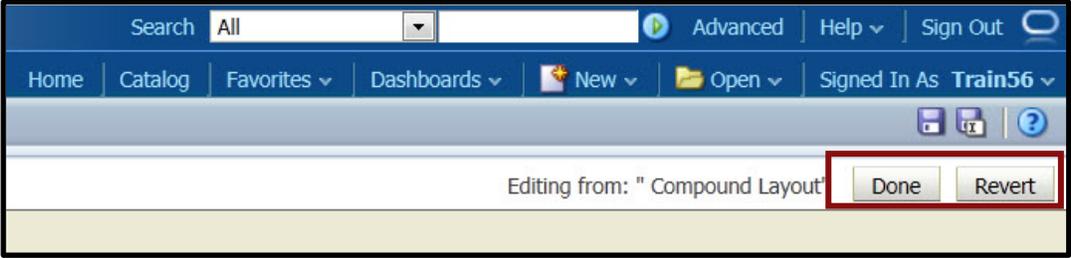


6. View the updated table with Sub-Totals following the targeted data element.

Figure 60: Sub-Totals in the Table

	Zebari	Debra	J	Full-Time	1
	Benj	Spingode	C	Full-Time	1
Four 10 Hour Days Per Week Total					23
Must Have 40 Hours Per Week					
	Bark	Deanna	BT	Full-Time	1
	Dean	Schweinsberg		Full-Time	1
	Fengqing	Lu	A	Full-Time	1
	Herr	Timothy	L	Full-Time	1
	Quanwen	Li	C	Full-Time	1
	Thompson	Robert	L	Full-Time	1
Must Have 40 Hours Per Week Total					
Must Have 40 Hours Per Week					
	Mike	Hembrough	C	Full-Time	1
	Paron	Swick		Full-Time	1
	Abby	Cheatham	L	Full-Time	1

Exclude Data Elements

Step	Action
1.	<p>Drag a data element to Excluded from the Layout pane. Data elements located in Excluded will not appear as columns within the table.</p> <p style="text-align: center;"><i>Figure 61: Excluded Data Element</i></p> 
	<p>IMPORTANT: Excluding a column prevents the data element from displaying as a column within the table; however, the data element will still appear in the Selected Columns pane within the Criteria tab. Users can easily add a data element back into a table by dragging it into the Column and Measures section.</p>
2.	<p>Click Done to close the Layout pane and return to the Results tab. Users can also click Revert to abandon the edits made in the Layout pane.</p> <p style="text-align: center;"><i>Figure 62: Layout Pane Done and Revert Buttons</i></p> 

3.5. Create Ad Hoc Reports: Exercises

Exercise 3.1: Create an Ad Hoc Report

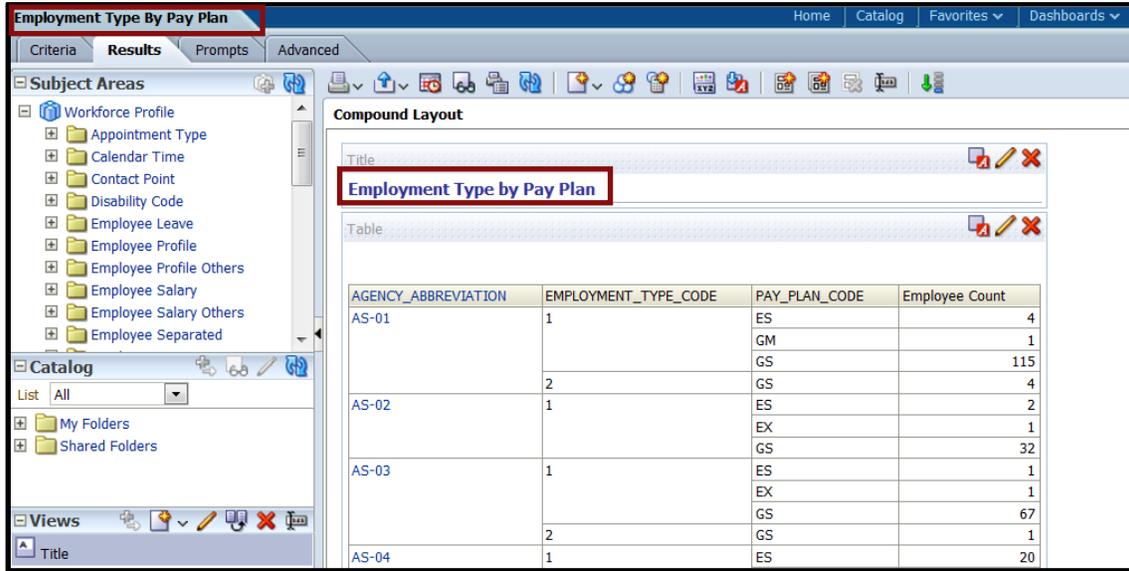
Scenario: Padma needs to create a report that shows basic demographic information about the employees in her agency, including how many employees are full-time or part-time.

Instructions: Follow the steps below to complete the exercise in *Insight*:

1. Click the **New** link from the top navigation bar and select **Analysis**.
2. Select the **Workforce Profile** Subject Area.
3. From the **Subject Areas** pane of the **Criteria** tab, double-click the data elements outlined below to add them to the Selected Columns pane:
 - a. Within the Employment Type folder, select EMPLOYMENT_TYPE_CODE_DESCR.
 - b. Within the Organization folder, select AGENCY_ABBREVIATION.
 - c. Within Pay Plan folder, select PAY_PLAN_CODE.
 - d. Within the Workforce Biweekly folder, select Employee Count.
4. Navigate to the **Results** tab. Within the table, drag and drop the report columns to reflect the following order (left to right):
 - a. AGENCY_ABBREVIATION
 - b. EMPLOYMENT_TYPE_CODE_DESCR
 - c. PAY_PLAN_CODE
 - d. Employee Count
5. Click the **Edit** View icon corresponding to the Title.
6. Update the title to read “Employment Type by Pay Plan”.
7. Uncheck the Display Saved Name check box.
8. Click **Done**.
9. Click the **Save As** icon to and save the Report to My Folders as “Employment Type by Pay Plan”.

Check Your Work:

Figure 63: Employment Type by Pay Plan Ad Hoc Report



AGENCY_ABBREVIATION	EMPLOYMENT_TYPE_CODE	PAY_PLAN_CODE	Employee Count
AS-01	1	ES	4
		GM	1
		GS	115
AS-02	1	GS	4
		ES	2
		EX	1
AS-03	1	GS	32
		ES	1
		EX	1
AS-04	1	GS	67
		ES	1
AS-04	1	ES	20

Notes:

Exercise 3.2: Edit the Styles and Formatting of a Report

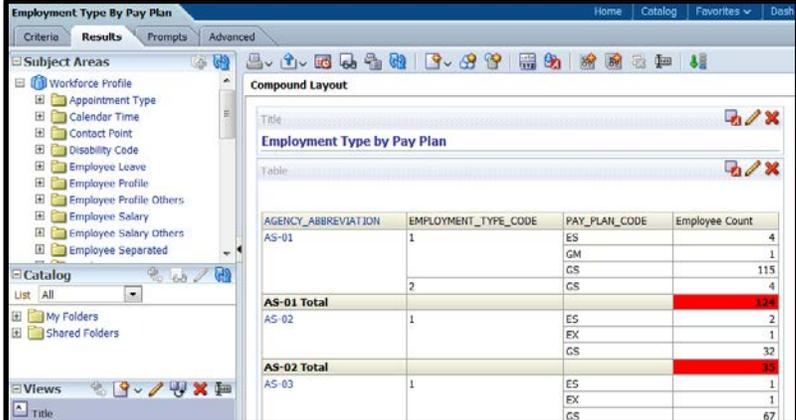
Scenario: Padma needs to edit the formatting of the “Employment Type by Pay Plan” report and apply Sub-Totals to make it easier for her manager to analyze the findings.

Instruction: Follow the steps below to complete the exercise in *Insight*:

1. Click the **Catalog** action link from the top navigation bar.
2. Click the **My Folders** to locate the “Employment Type by Pay Plan” report that was saved in Exercise 1. Click the corresponding **Edit** action link.
3. Navigate to the **Results** tab and click the **Edit View** icon corresponding to the Table section.
4. Within the **Layout** pane, navigate to the Columns and Measures section.
5. From the Columns and Measures section, navigate to the AGENCY_ABBREVIATION data element.
6. Click the corresponding **Totals** icon and select **After**.
7. Within the Columns and Measures section, click on the **Totals** icon corresponding to the AGENCY_ABBREVIATION data element, and select **Format Values**.
8. Format the font as Bold and change the cell background to red.
9. Click **OK**.
10. Click **Done**.
11. Click the **Save** icon.

Check Your Work:

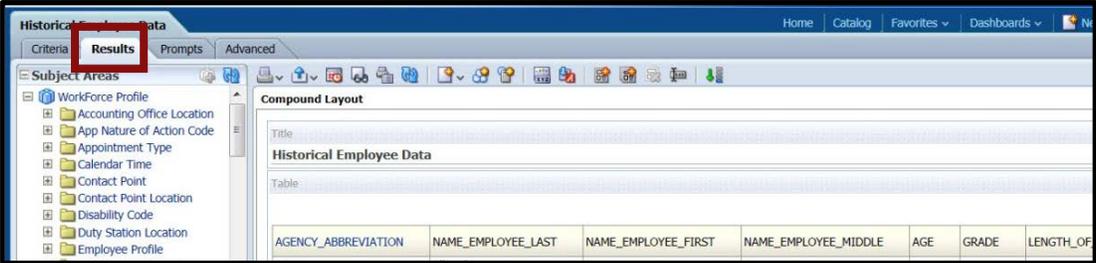
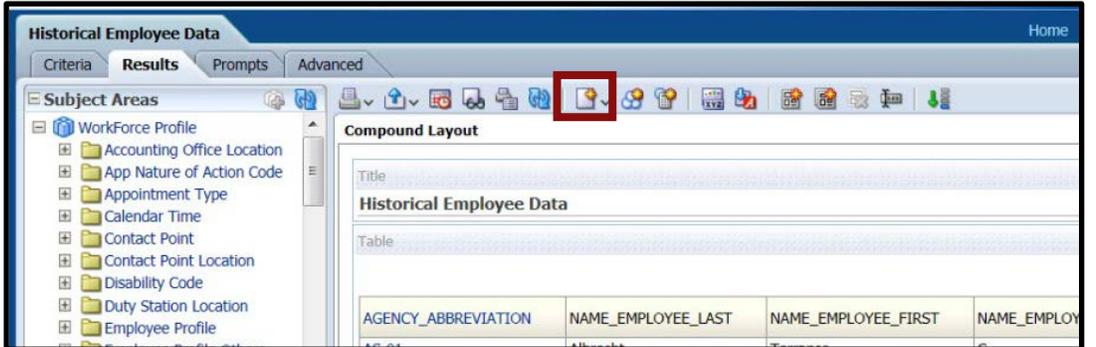
Figure 64: Employment Type by Pay Plan Ad Hoc Report with Formatted Totals Values



AGENCY_ABBREVIATION	EMPLOYMENT_TYPE_CODE	PAY_PLAN_CODE	Employee Count
AS-01	1	ES	4
		GM	1
		GS	115
	2	GS	4
AS-01 Total			124
AS-02	1	ES	2
		FX	1
		GS	32
AS-02 Total			35
AS-03	1	ES	1
		FX	1
		GS	67

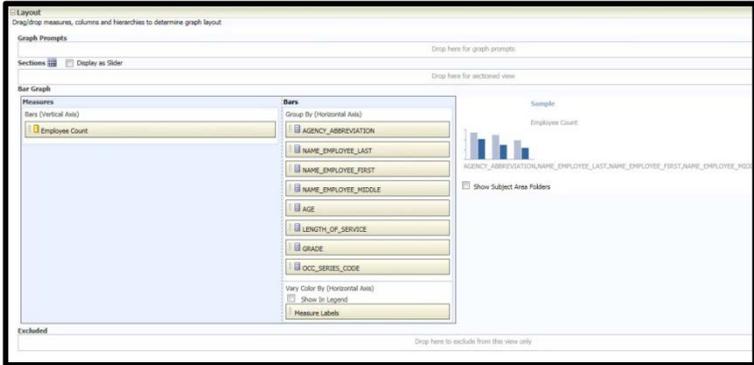
3.6. Create a Graph in a Report

Create a New Graph

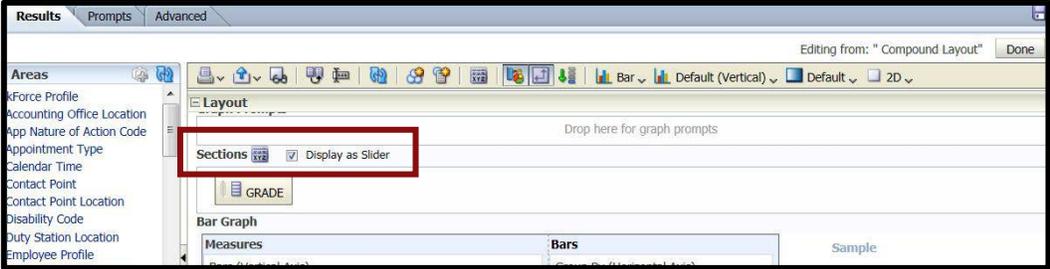
Step	Action
1.	<p>Navigate to the Results tab of the <i>ad hoc report editing</i> page.</p> <p style="text-align: center;"><i>Figure 65: Report Results Tab</i></p> 
2.	<p>Click the New View icon from the Results tab navigation bar.</p> <p style="text-align: center;"><i>Figure 66: Report Results Tab with New View Icon Highlighted</i></p> 

3.7. Edit the Structure of a Graph in a Report

Edit a Graph Using the Layout Pane

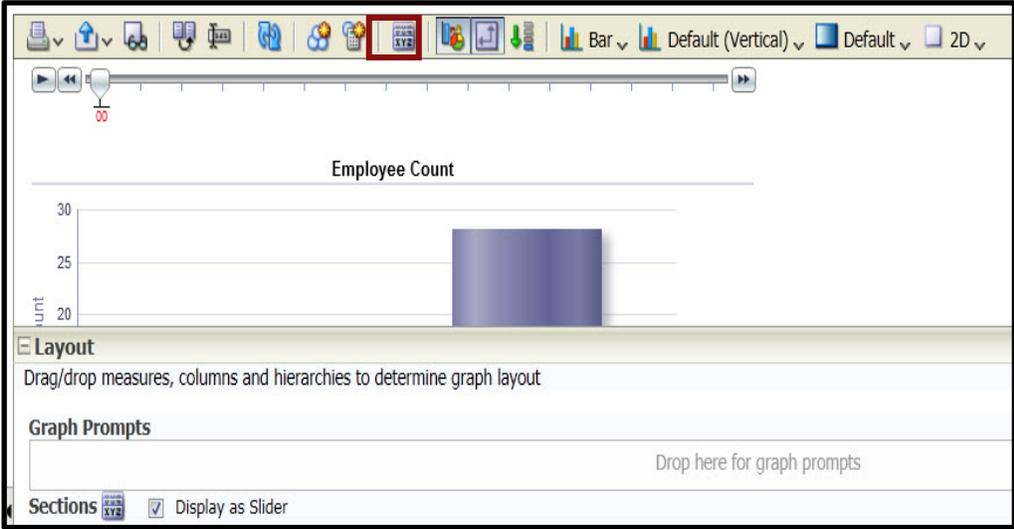
Step	Action
1.	<p>Click the Edit View icon within the graph component of the report.</p> <p style="text-align: center;"><i>Figure 69: Graph Edit View Icon</i></p> 
2.	<p>Within the Layout pane, customize the structure of the graph by dragging data elements from the default graph section to <i>Graph Prompts</i>, <i>Sections</i>, <i>Excluded</i>, <i>Vary Color By</i>, and <i>Excluded</i></p> <ul style="list-style-type: none"> • Graph Prompts: Creates a prompt that will manipulate the data reflected in the graph. • Sections: Creates individual graphs for each value within the targeted data element or creates a slider bar. • Vary Color By: Defines the data elements that will display in the legend. • Excluded: Excludes certain data elements from the graph (data elements will still appear in the Selected Columns pane in the Criteria tab). <p style="text-align: center;"><i>Figure 70: Graph Layout Pane</i></p> 
	<p>TIP: The edits available within the Layout pane will change depending on the type of graph being modified.</p>

Create a Slider

Step	Action
1.	Drag a data element into Sections from the Layout pane within the Results tab.
2.	<p>Click the Display as Slider check box.</p> <p style="text-align: center;"><i>Figure 71: Graph Layout Pane</i></p> 
3.	<p>View the updated graph with the Slider. The Slider marker value (indicated in red text below the Slider marker) changes based on the position on the Slider.</p> <p style="text-align: center;"><i>Figure 72: Customized Graph with Slider</i></p> 
	<p>IMPORTANT: When time dimension data elements are part of a report, a Slider will allow the user to visually depict change over time.</p>

3.8. Customize the Styles and Formatting of a Graph in a Report

Update Graph Properties

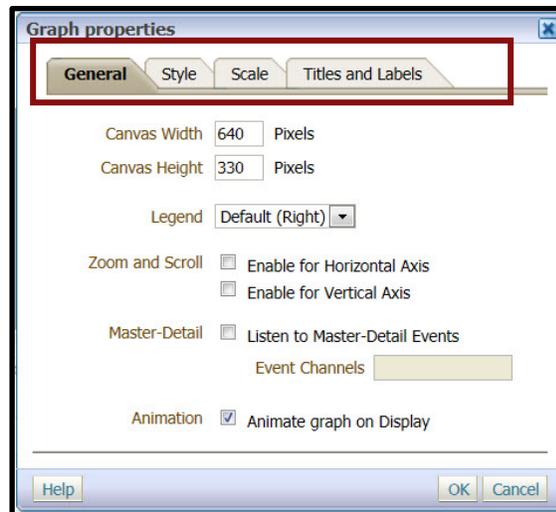
Step	Action
1.	<p>Click the Properties icon in the Results tab navigation bar with the Layout pane open.</p> <p style="text-align: center;"><i>Figure 73: Properties Icon Highlighted</i></p>  <p>The screenshot shows a software interface with a navigation bar at the top containing various icons. One icon, representing properties, is highlighted with a red box. Below the navigation bar is a graph titled 'Employee Count' with a y-axis labeled 'unit' ranging from 20 to 30. A single blue bar is shown at approximately 28 units. Below the graph is a 'Layout' pane with a 'Graph Prompts' section and a 'Sections' section with a 'Display as Slider' checkbox.</p>
	<p>IMPORTANT: The icons within the Results tab navigation bar will update based on the type of graph.</p>

2.

Use the Graph properties window to customize stylistic properties of the graph.

- **General:** Changes the position of the graph legend and enables/disables zooming on the graph.
- **Style:** Customizes the graph's appearance, such as formatting the plot area, legend, and background.
- **Scale:** Sets the scale and scale markers in the graph.
- **Titles and Labels:** Edits the title, axis titles and graph labels.

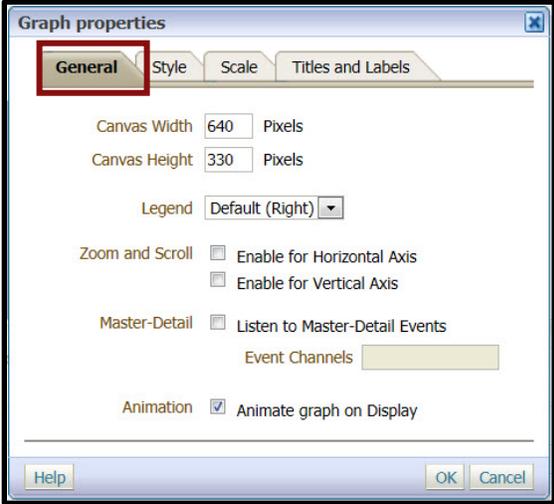
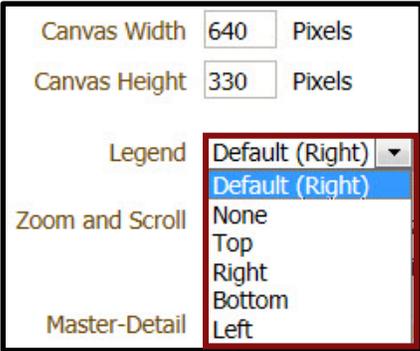
Figure 74: Graph Properties Window with Tabs Highlighted



Notes:

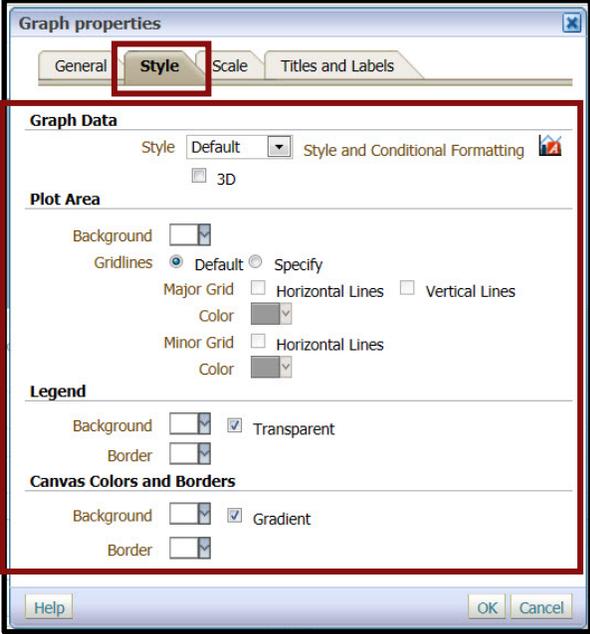
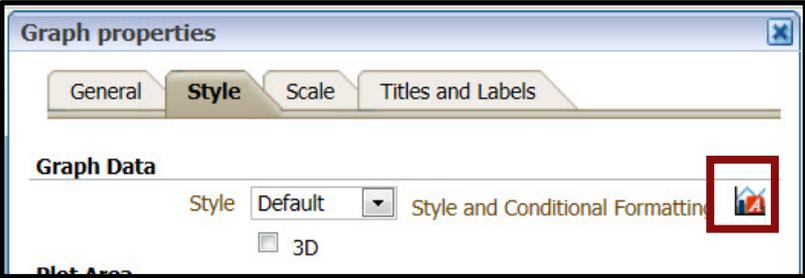


QUICK TIP: Edit the General Appearance of a Graph

Step	Action
1.	<p>Navigate to the General tab from the Graph properties window to customize the legend position, enable scrolls, etc.</p> <p style="text-align: center;"><i>Figure 75: Graph Properties Window General Tab</i></p> 
2.	<p>Click the Legend drop-down to choose the position of the legend within the graph.</p> <p style="text-align: center;"><i>Figure 76: Graph Legend Drop-Down Menu</i></p> 

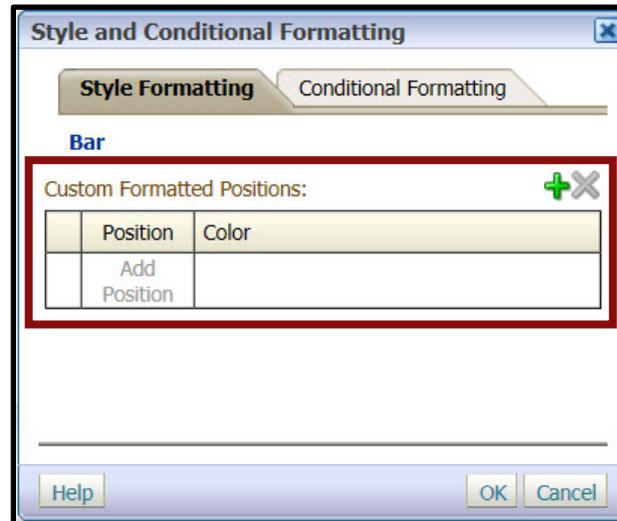


QUICK TIP: Edit the Stylistic Formatting of a Graph

Step	Action
1.	<p>Navigate to the Style tab from the Graph properties window to update styles and appearance of the <i>data</i>, <i>plot area</i>, <i>legend</i> and <i>canvas</i>.</p> <p style="text-align: center;"><i>Figure 77: Graph Properties Window Style Tab</i></p> 
2.	<p>Programming the styles within Graph Data will customize the colors of the legend. Click the Style icon to open the Style and Conditional Formatting window.</p> <p style="text-align: center;"><i>Figure 78: Graph Properties Window Style Tab with Style Icon Highlighted</i></p>  <p> Style: Applies Style and Conditional Formatting to a graph view.</p>

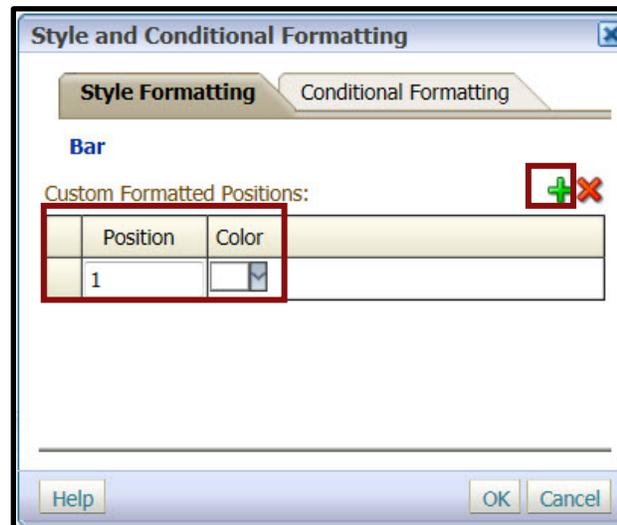
3. Use the Style and Conditional Formatting window to customize the colors in the graph based on position.

Figure 79: Style and Conditional Formatting Window



4. Click the **New** icon to add a new position to format.

Figure 80: Style and Conditional Formatting Window with New Icon Highlighted

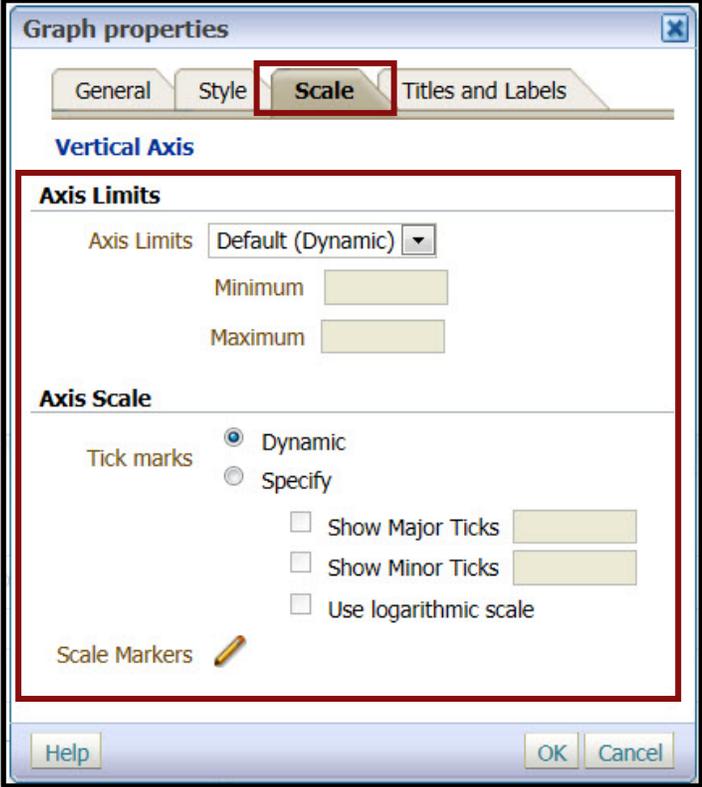


New: Creates a new item for the function that the user is editing.

5. Select a color for each position required in the graph and click **OK**.



QUICK TIP: Edit the Graph Scale

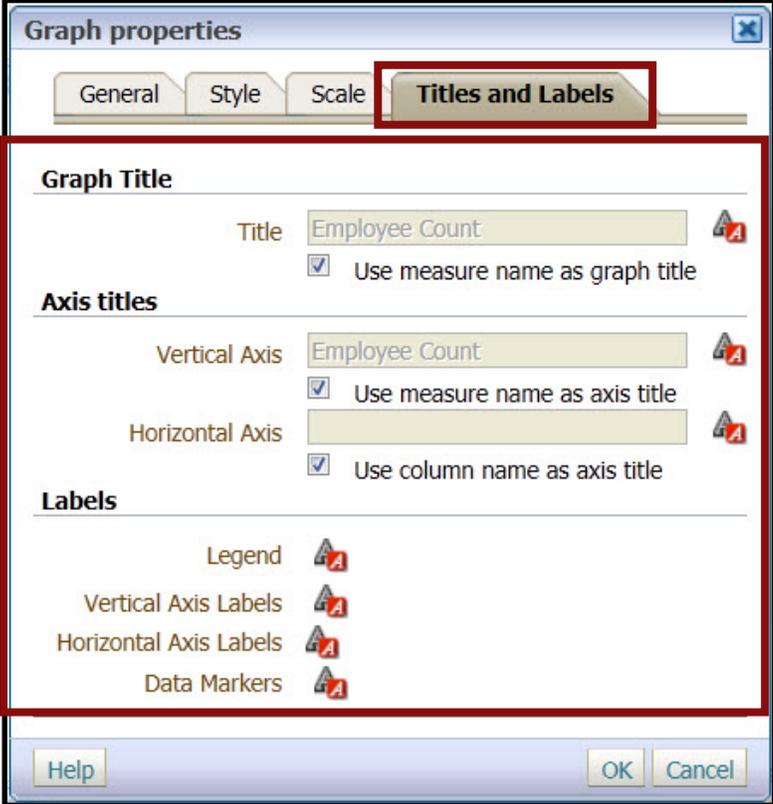
Step	Action
<p>1.</p>	<p>Navigate to the Scale tab from the Graph properties window to update the Axis Limits and Axis Scale for the graph.</p> <p><i>Figure 81: Graph Properties Window with Scale Tab Highlighted</i></p> 
	<p>IMPORTANT: When customizing Tick marks, users are identifying the number of tick marks that will appear, not the intervals in which Tick marks appear.</p>

2.	<p>Use Axis Limits to force minimum and maximum values for the graph.</p> <p><i>Figure 82: Axis Limits Section of the Graph Properties Window</i></p> <div data-bbox="477 352 1300 583" style="border: 1px solid black; padding: 5px;"><p>Axis Limits</p><p>Axis Limits <input type="text" value="Default (Dynamic)"/></p><p>Minimum <input type="text"/></p><p>Maximum <input type="text"/></p></div>
	<p>IMPORTANT: Leaving the default settings to Dynamic allows <i>Insight</i> to automatically scale the graph [<i>Recommended</i>].</p>

Notes:



QUICK TIP: Edit the Graph Title

Step	Action
<p>1.</p>	<p>Navigate to the Titles and Labels tab from the Graph properties window to customize graph and axis titles and format graph labels.</p> <p><i>Figure 83: Graph Properties Window with Titles and Labels Tab Highlighted</i></p> 
	<p>IMPORTANT: When a report is run, the default is for the data markers (data labels within the graph) to display as a user scrolls over the graph. By clicking Data Markers users can change the settings to always or never display the individual data values in a graph view.</p>

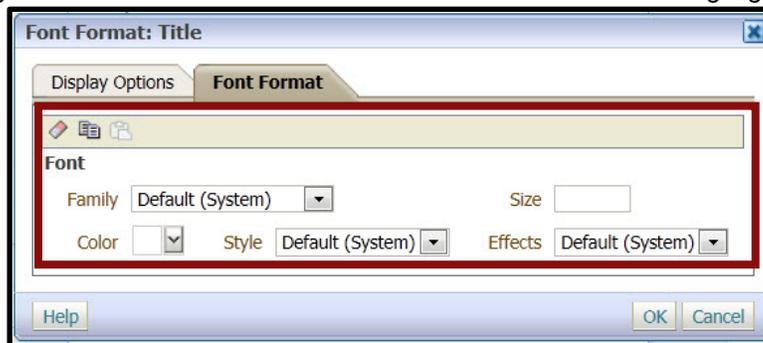
- Click the **Use measure name as graph title** check box and the **Use column name as axis title** check box below the respective title to customize graph and axis titles.

Figure 84: Graph Properties Window with Graph and Axis Titles Checkboxes Highlighted



- Click the corresponding **Format Heading** icon to edit the display and font options of each title and/or label.

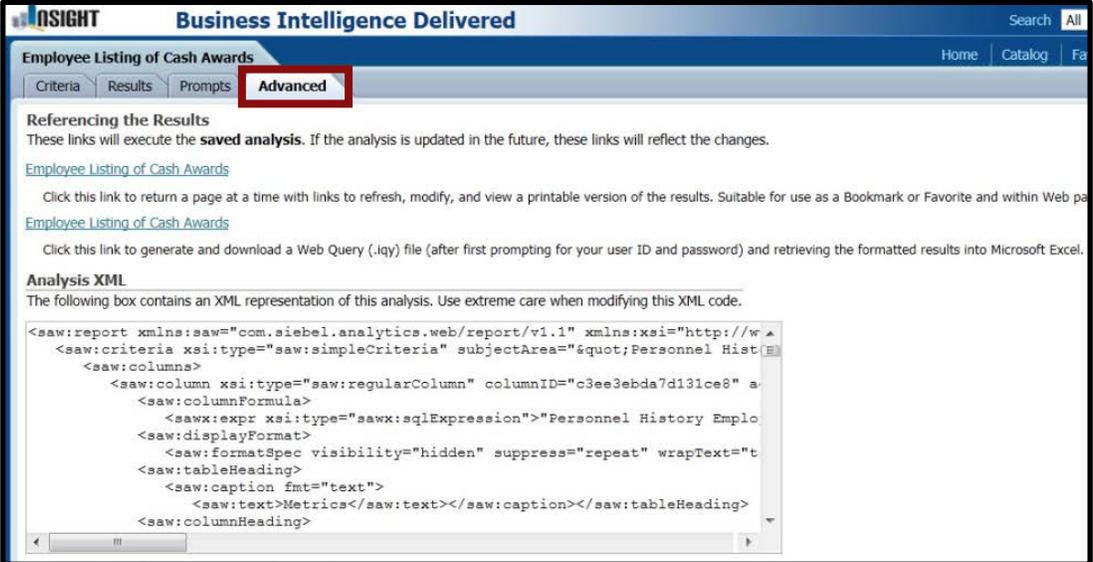
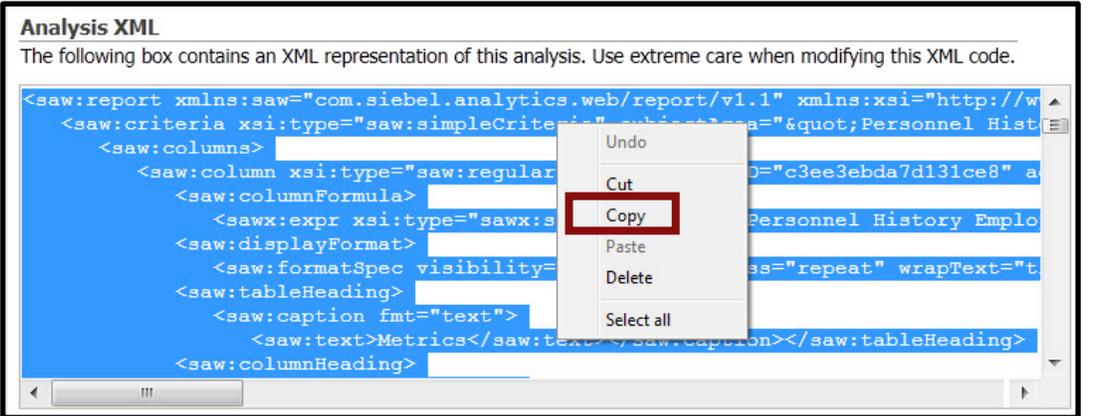
Figure 85: Font Format: Title Window with Font Format Tab Highlighted

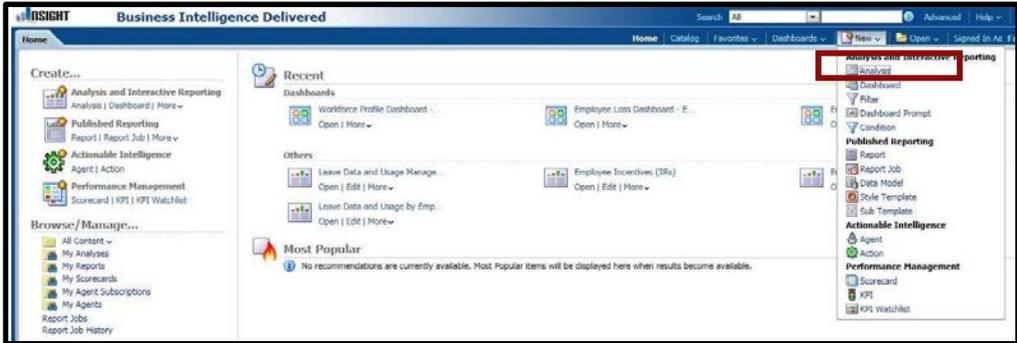
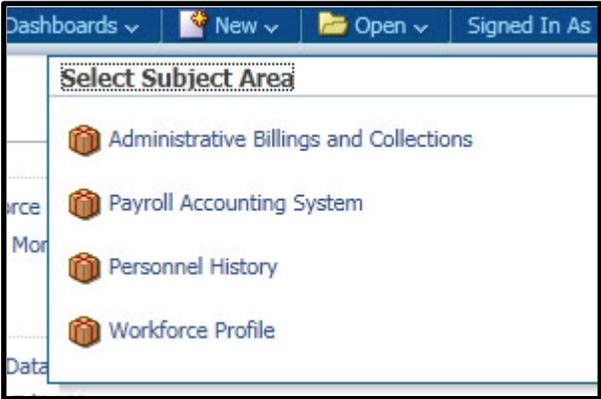


- Click **OK**.



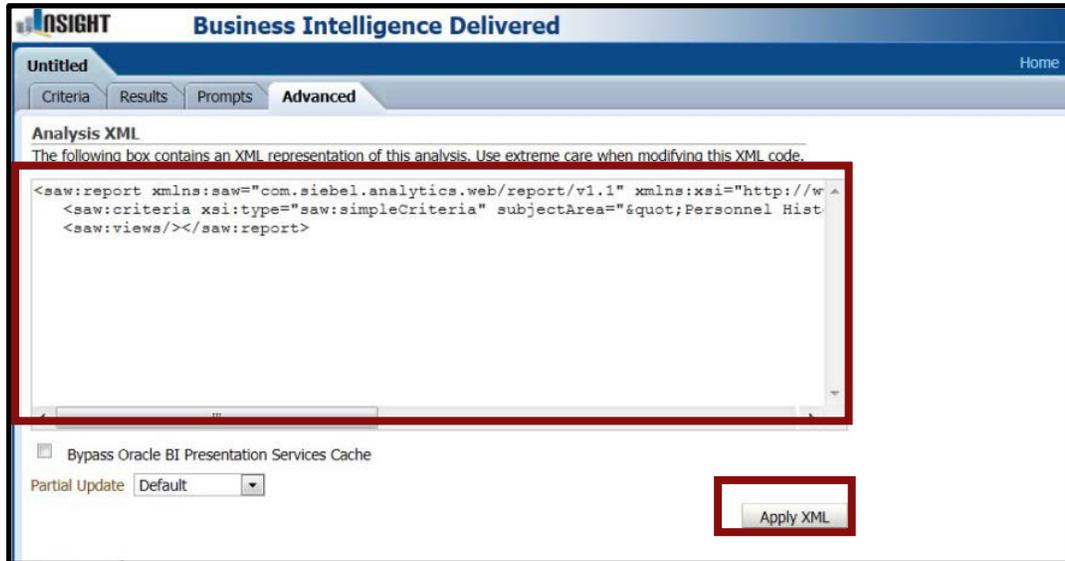
QUICK TIP: Share the Logic Behind a Report

Step	Action
1.	<p>Navigate to the Advanced tab from the <i>ad hoc report editing</i> page.</p> <p style="text-align: center;"><i>Figure 86: Advanced Tab</i></p> 
2.	<p>Highlight the XML code. Right-click and select Copy. Users can now share this XML code with other users to duplicate the report.</p> <p style="text-align: center;"><i>Figure 87: Advanced Tab with XML Code and Copy Option Highlighted</i></p> 

<p>3.</p>	<p>Click the New action link and select Analysis from the top navigation bar.</p> <p><i>Figure 88: Home Page with Analysis Option Highlighted in the New Drop-Down Menu</i></p> 
<p>4.</p>	<p>Select the desired Subject Area from the list of options.</p> <p><i>Figure 89: Subject Area Drop-Down Menu</i></p> 
	<p>IMPORTANT: Users must select the same Subject Area as the XML report.</p>
<p>5.</p>	<p>Navigate to the Advanced tab from the ad hoc report editing page. Paste the XML code within the Analysis XML section.</p>

6. Click **Apply XML**.

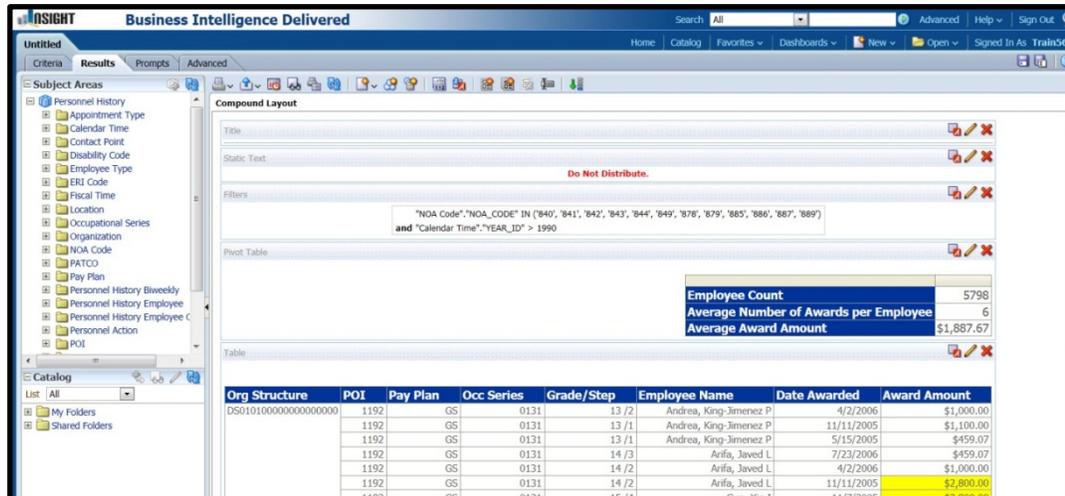
Figure 90: New Analysis Advanced Tab with Apply XML Button Highlighted



IMPORTANT: Users should delete any existing XML code in the XML area before pasting the new code in it.

7. Navigate to the **Results** tab of the **ad hoc report editing** page to view the result of the report.

Figure 91: New Analysis After XML Code was Applied



3.9. Create Ad Hoc Reports: Exercise

Exercise 3.3: Create a Graph

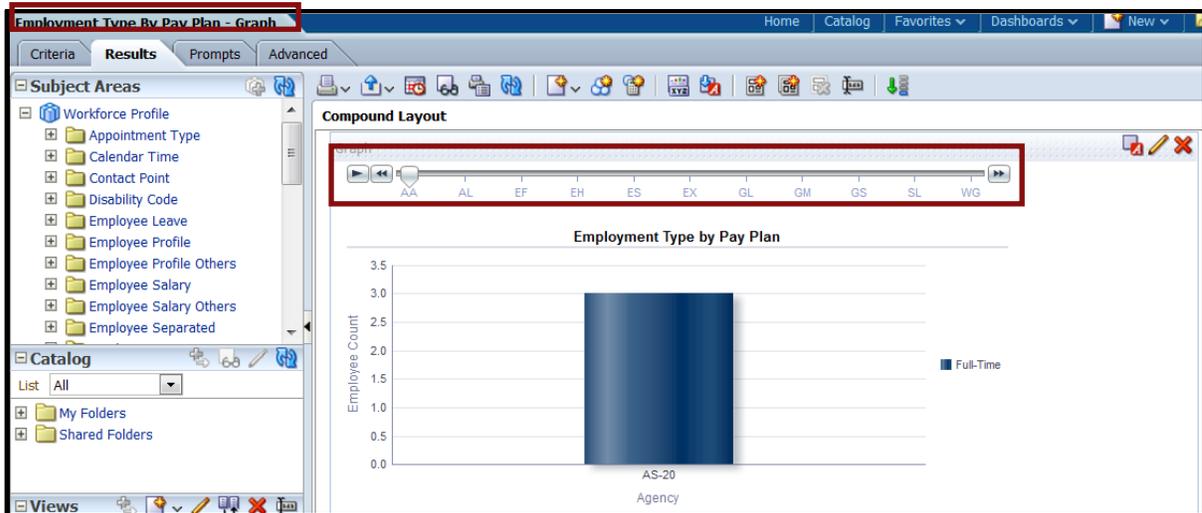
Situation: Padma needs to add a graph to the “Employment Type by Pay Plan” report that displays the number of full-time and part-time employees by agency.

Instruction: Follow the steps below to complete the exercise in *Insight*:

1. Click the **My Folders** to locate the “Employment Type by Pay Plan” report that was saved in Exercise 1. Click the corresponding **Edit** action link.
2. Click the **New View** icon from the Result tab navigation bar.
3. From the menu of options, select **Graph**, then select **Bar**, then select **Vertical**.
4. Click the **Edit View** icon corresponding to the graph component of the report.
5. Drag the EMPLOYMENT_TYPE_CODE_DESCR data element to the Vary Color By (Horizontal Axis) section.
6. Drag the PAY_PLAN_CODE data element to Sections.
7. Click the **Display as Slider** check box.
8. From the **Results** tab navigation bar, click the **Properties** icon.
9. Within the Graph Properties window, navigate to the Titles and Labels tab. Uncheck the **Use Measure Name as Graph Title** check box.
10. Update the graph title to read “Employment Type by Pay Plan”.
11. For the horizontal axis, uncheck the **Use Column Name as Axis Title** dialog box and edit the horizontal axis to read “Agency”.
12. Click **OK**.
13. Click **Done**.
14. Click the **Save As** icon and save to My Folders as “Employment Type by Pay Plan – Graph”.

Check Your Work:

Figure 92: Employment Type of Pay Plan Graph with a Slider



3.10. Chapter Review

Chapter Summary

Having completed this chapter, you should now be able to:

- Demonstrate how to create a new ad hoc report
- Demonstrate how to apply formatting from an existing report
- Demonstrate how to create and customize a graph within a report

Notes:

4.0. Customize and Create Ad Hoc Dashboards

4.1. Chapter Overview

This chapter will review how dashboards provide users with the “30,000” foot view of data with the option to drill-down to a detailed look at a specific interest point. *Insight* provides the following options for dashboard customization and creation:

- Manipulating the layout of objects within a dashboard
- Adding and naming multiple dashboard pages
- Creating new ad hoc dashboards

Chapter Objectives

By the end of this chapter, you will be able to:

- Demonstrate how to edit a common dashboard
- Demonstrate how to customize a common dashboard with styles and formatting
- Demonstrate how to create a dashboard using existing reports

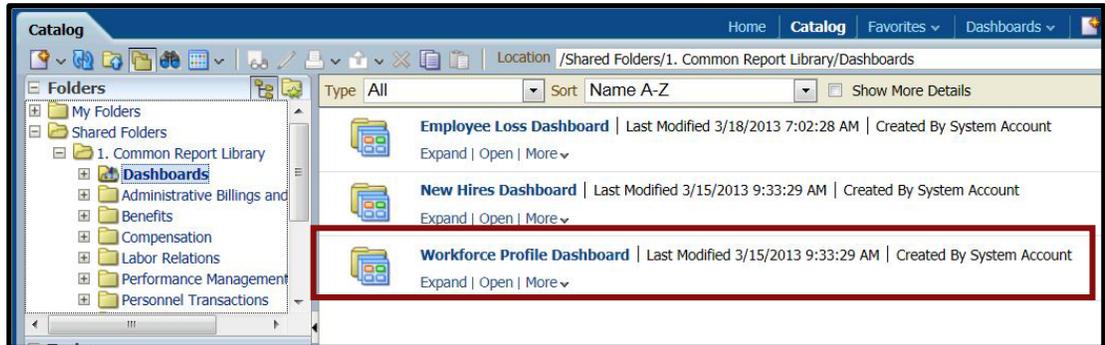
4.2. Customize a Dashboard with Styles and Formatting

Copy a Common Dashboard into My Folders

Step	Action
1.	<p>Navigate to the Common Report Library by clicking the Catalog action link from the top navigation bar.</p> <p><i>Figure 93: Common Report Library with Catalog Action Link Highlighted</i></p>  <p>The screenshot shows the INSIGHT Business Intelligence Delivered interface. The top navigation bar includes a search box, a 'Catalog' link (highlighted with a red box), and other navigation options like 'Home', 'Favorites', 'Dashboards', 'New', and 'Open'. The main content area displays a list of folders under the 'Common Report Library' path, including 'Administrative Billings and Collections', 'Benefits', 'Compensation', 'Dashboards', and 'Labor Relations'. Each folder entry includes a 'Last Modified' date and 'Created By System Account' information.</p>

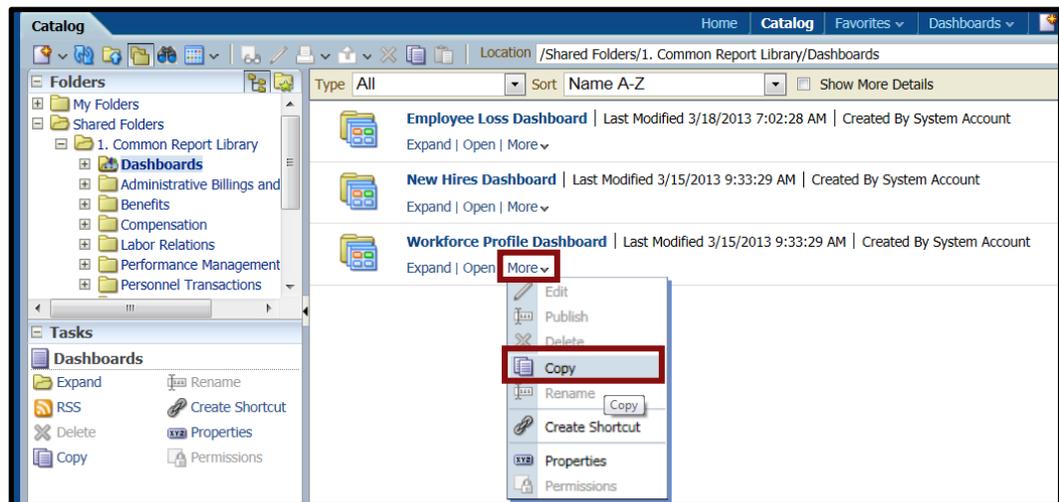
2. Navigate to the desired dashboard within the Common Report Library.

Figure 94: Common Dashboard Highlighted in the Common Report Library



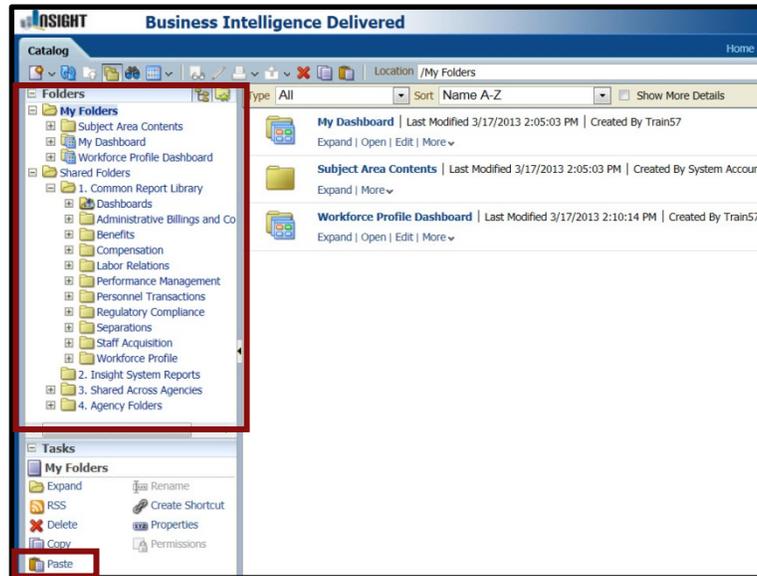
3. Click the **More** action link and select **Copy** from the drop-down menu.

Figure 95: More Drop-Down Menu with Copy Highlighted



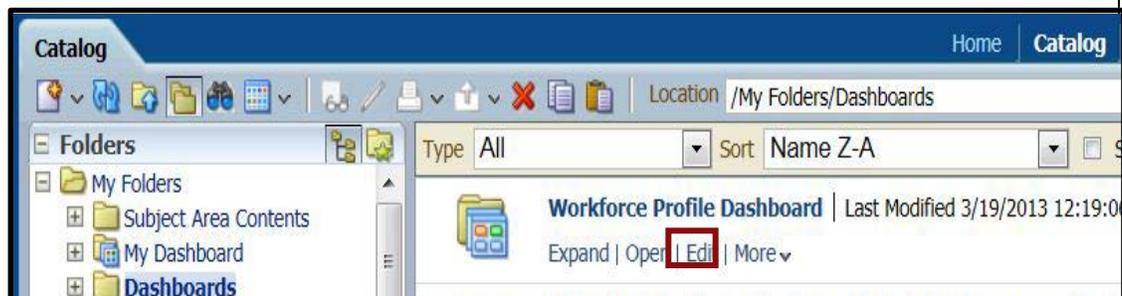
- Navigate to My Folders and paste the dashboard into the desired location by clicking **Paste** from the **Tasks** pane.

Figure 96: Catalog with the Folders Pane and Paste Action Link Highlighted



- Click the **Edit** action link that corresponds to the newly pasted dashboard.

Figure 97: Common Dashboard within My Folders and Highlighted Edit Action Link

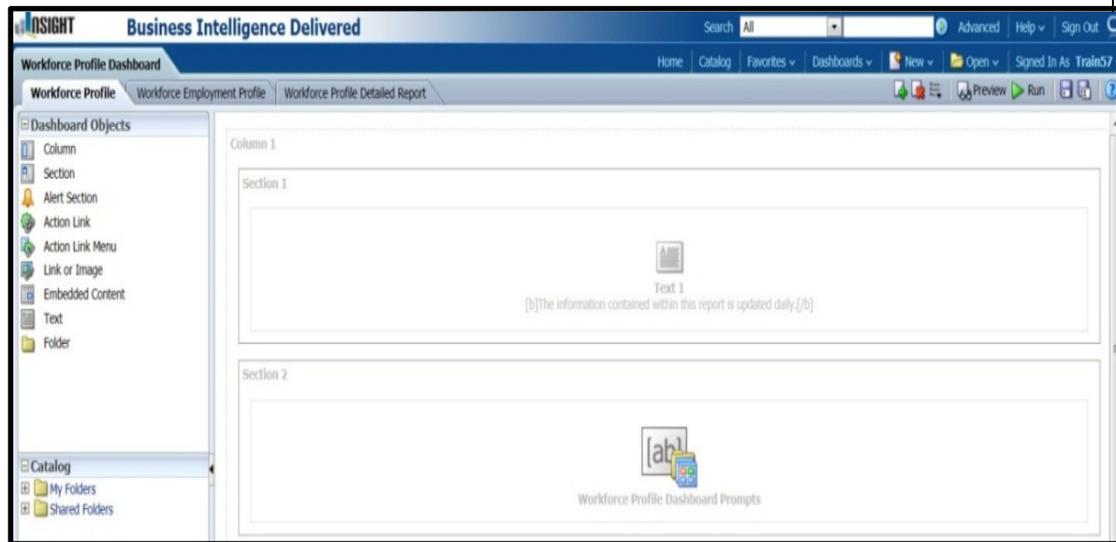


6.

View the **ad hoc dashboard editing** page to edit the structure of the dashboard using the following components:

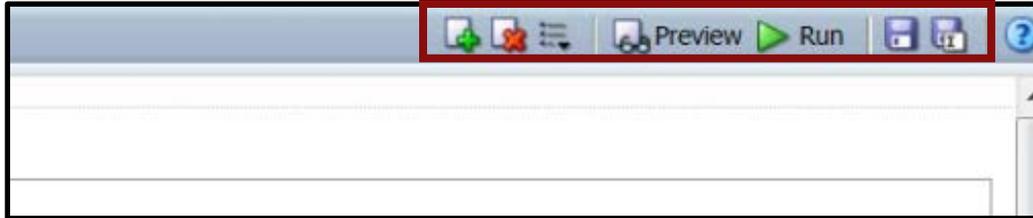
- **Dashboard Objects:** Lists the structural elements (e.g., column, section) and individual items (e.g., text, action link) available for dashboard development.
- **Catalog:** Provides access to saved items (e.g., reports, dashboard prompts, etc.) in My Folders and Shared Folders.
- **Dashboard workspace:** Outlines the dashboard components as they appear when the dashboard is run.

Figure 98: Ad Hoc Dashboard Editing Page



7. Use the ad hoc dashboard navigation bar to customize, preview, and run a dashboard.

Figure 99: Dashboard Navigation Bar



Add Dashboard Page: Adds a new page to the dashboard.



Delete Current Page: Deletes the current dashboard page.



Preview: Previews a dashboard before it runs in a new window.



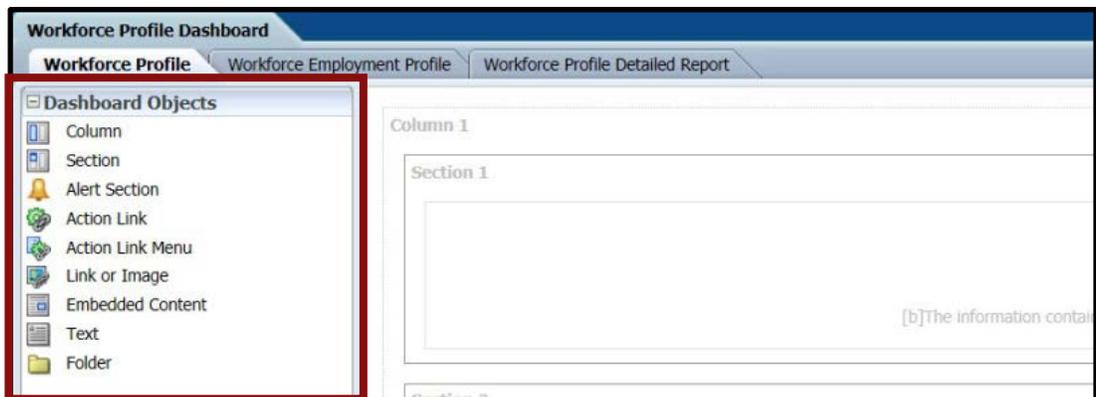
Run: Runs the dashboard to view results.

Notes:

Dashboard Objects

Step	Action
1.	<p>Use the Dashboard Objects pane to drag and drop dashboard objects to structure the layout within the Dashboard workspace.</p> <ul style="list-style-type: none"> • Column: Defines columns within a dashboard page to structure the layout of a dashboard (e.g., side to side, horizontal, vertical). Users can create as many columns on a dashboard page as needed. • Section: Divides a dashboard column into components. Sections are used within columns to structure content and can be aligned vertically or horizontally. • Alert Section: Adds a section that displays alerts from schedulers. • Action Link: Embeds a link in a report or dashboard. These links can navigate users to existing reports within <i>Insight</i> or external websites. • Link or Image: Adds text or image web links to a page. This allows users to include a logo or image that brands a dashboard for an organization. • Embedded Content: Displays another web page inside a dashboard page. • Text: Includes static text or HTML within a dashboard. This feature allows users to add notes for a consumer of the dashboard (e.g., For Internal Purposes Only).

Figure 100: Ad Hoc Dashboard Editing Page with Dashboard Objects Pane Highlighted

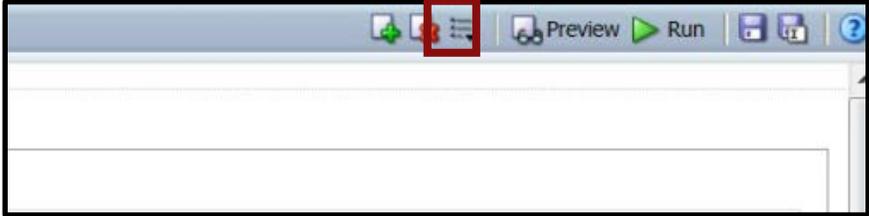
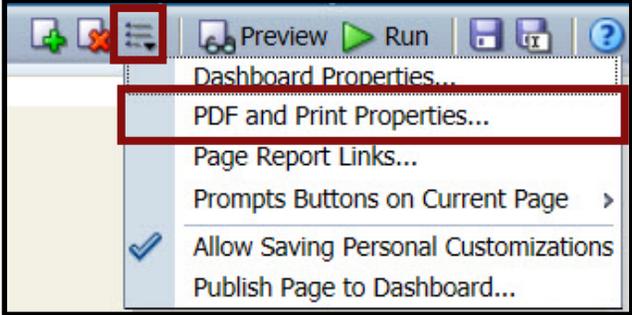


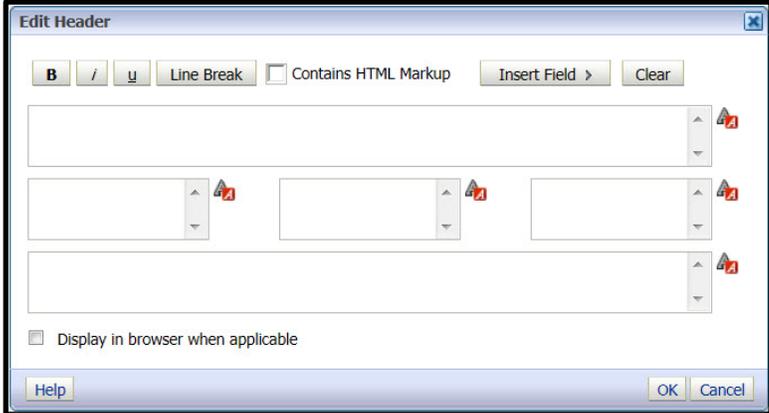
Remove Dashboard Components

Step	Action
1.	<p>Hover over the Section and click the Delete icon to remove a Section.</p> <p><i>Figure 101: Dashboard Section with Delete Icon Highlighted</i></p> 
2.	<p>To remove an individual report within the dashboard, hover over the report and click the Delete icon.</p> <p><i>Figure 102: Dashboard Report View with Delete Icon Highlighted</i></p> 
	<p>IMPORTANT: When editing a common dashboard, users can remove individual reports or Sections but should not remove an entire dashboard page.</p>
	<p>IMPORTANT: There is no “undo” option available once a dashboard component has been removed.</p>

Notes:

Edit Dashboard Print Properties

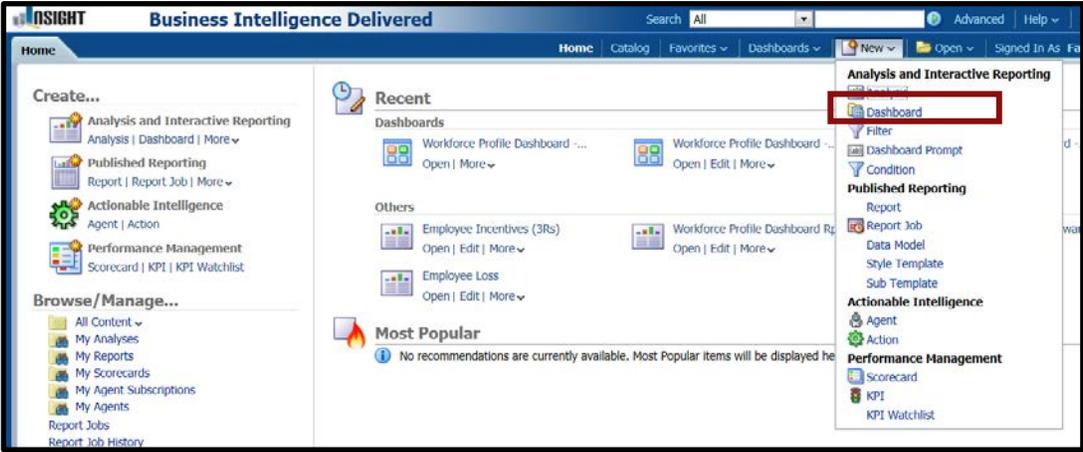
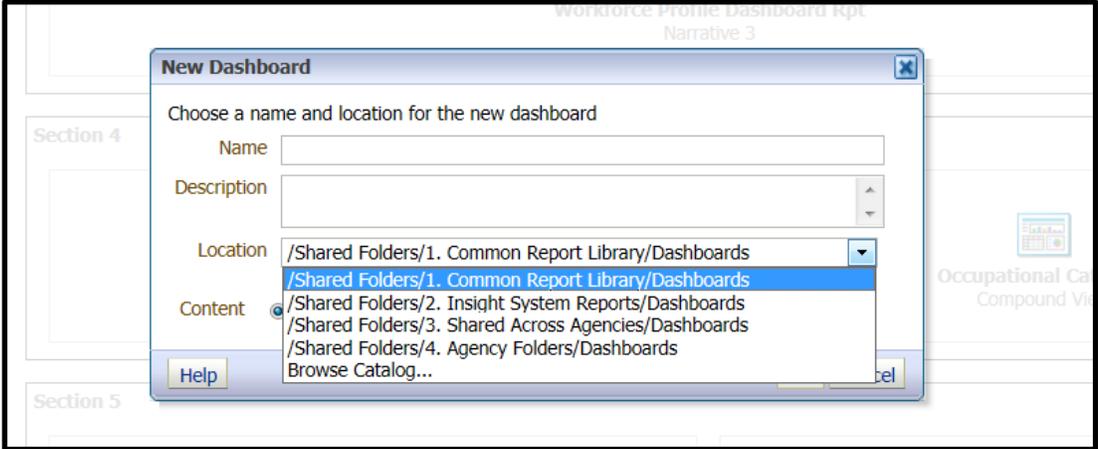
Step	Action
1.	<p>Click the Edit icon from the dashboard navigation bar in the <i>ad hoc dashboard editing</i> page.</p> <p><i>Figure 103: Ad Hoc Dashboard Navigation Bar with Edit Icon Highlighted</i></p> 
2.	<p>Select PDF and Print Properties.</p> <p><i>Figure 104: Dashboard Edit Icon Drop-Down Menu with PDF and Print Properties Highlighted</i></p> 
3.	<p>Use the Print Options window to customize the page settings and choose whether to include a Header or Footer when the dashboard prints.</p>
4.	<p>Select the respective check box and click Edit to customize the Header or Footer.</p>

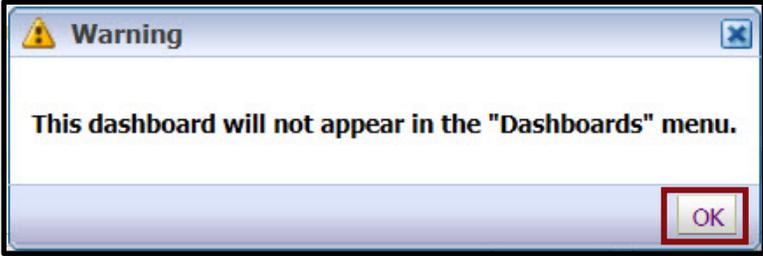
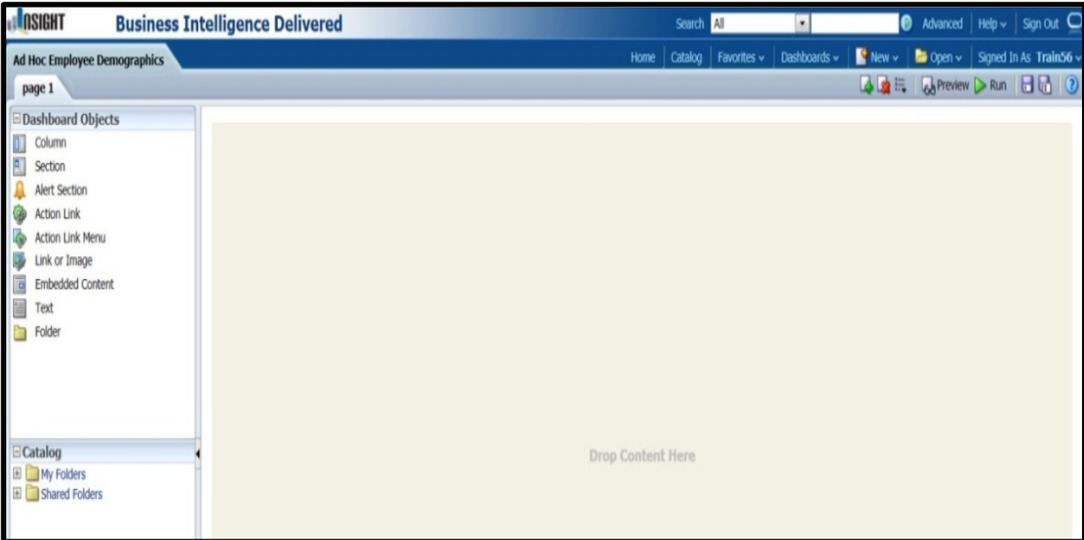
<p>5.</p>	<p>Use the Edit Header or Edit Footer window to input text and customize the stylistic formatting (e.g., font, color, etc.).</p> <p style="text-align: center;"><i>Figure 105: Edit Header Window</i></p> 
<p>6.</p>	<p>Click the Save icon from the dashboard navigation bar to save edits to the dashboard.</p>

Notes:

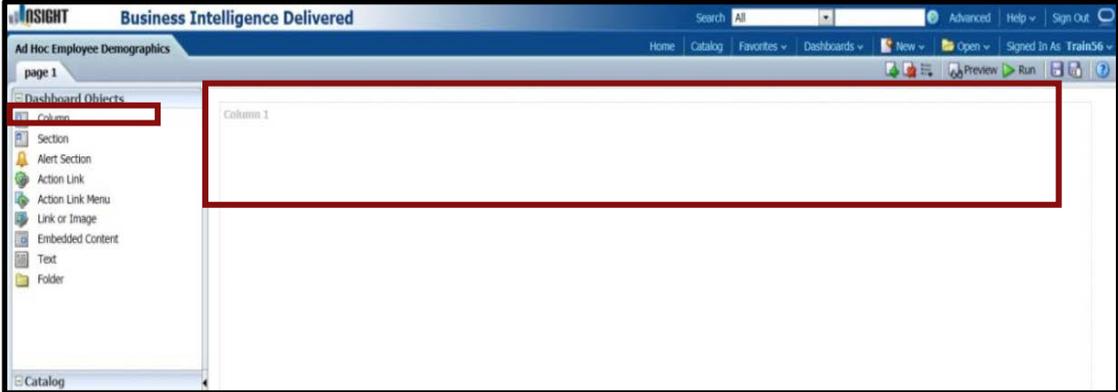
4.3. Create an Ad Hoc Dashboard Using Existing Reports

Create an Ad Hoc Dashboard

Step	Action
1.	<p>Click the New action link from the top navigation bar and select Dashboard.</p> <p><i>Figure 106: Home Page with Dashboard Highlighted in the New Drop-Down Menu</i></p> 
2.	<p>View the New Dashboard window to define a custom name for the dashboard and save it to a defined location. Select the desired location from the Location drop-down or select Browse Catalog for more options.</p> <p><i>Figure 107: New Dashboard Window with Location Drop-Down Menu</i></p> 

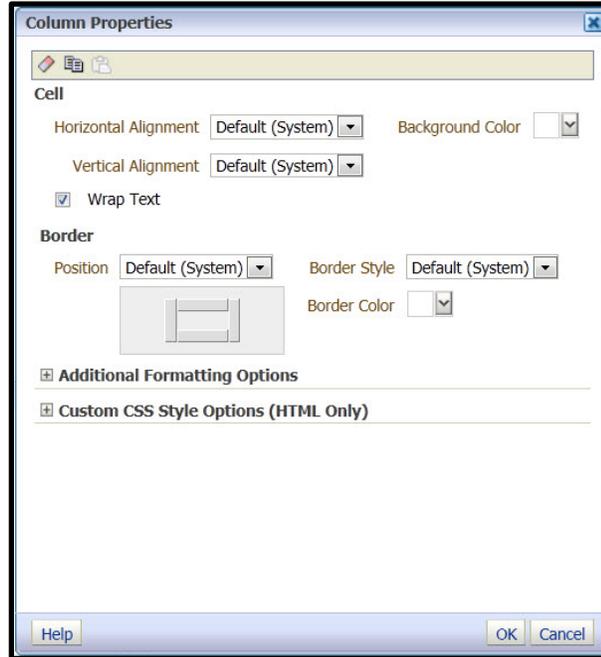
<p>3.</p>	<p>A warning notification appears: “This dashboard will not appear in the “Dashboards” menu.” Click OK.</p> <p style="text-align: center;"><i>Figure 108: New Dashboard Warning Notification</i></p>  <p>The image shows a warning dialog box with a yellow warning icon and the text: "Warning: This dashboard will not appear in the 'Dashboards' menu." An "OK" button is highlighted with a red box.</p>
	<p>IMPORTANT: Users must navigate to the appropriate saved folder within the Catalog to access a previously saved ad hoc dashboard instead of clicking on the Dashboard menu from the top navigation bar.</p>
<p>4.</p>	<p>View the ad hoc dashboard editing page to build the ad hoc dashboard.</p> <p style="text-align: center;"><i>Figure 109: Ad Hoc Dashboard Editing Page</i></p>  <p>The screenshot shows the "Ad Hoc Employee Demographics" editing page in the OSIGHT interface. The left sidebar lists "Dashboard Objects" (Column, Section, Alert Section, Action Link, Action Link Menu, Link or Image, Embedded Content, Text, Folder) and "Catalog" (My Folders, Shared Folders). The main area is a large empty space with the text "Drop Content Here".</p>

Edit the Dashboard Layout

Step	Action
1.	<p>Drag and drop the Column object from the Dashboard Objects pane into the Dashboard workspace.</p> <p><i>Figure 110: Dashboard Workspace with Column Highlighted</i></p> 
2.	<p>Click the Edit icon and select Column Properties to customize the appearance of the column in the dashboard.</p> <p><i>Figure 111: Dashboard Column Properties Menu Option</i></p> 

- View the Column Properties window, which allows users to customize the styles and formatting of a Column in the dashboard.

Figure 112: Column Properties Window



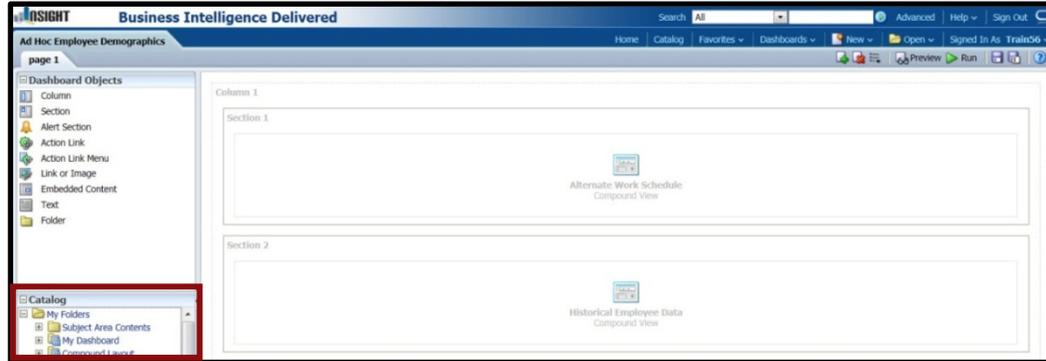
- Drag Sections into the existing Columns to continue to build out the structure of the dashboard.

Figure 113: Dashboard Workspace with Columns and Sections



5. Drag and drop reports into the dashboard from Shared Folders or My Folders.

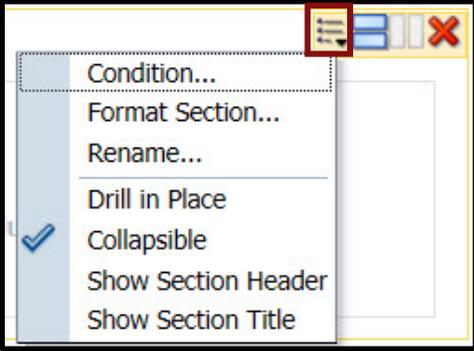
Figure 114: Dashboard Workspace with Reports



IMPORTANT: If users add a common report containing prompts to a dashboard, the prompts appear when the dashboard runs. Users must first remove the prompts and save the report to My Folders before using the report in a dashboard.

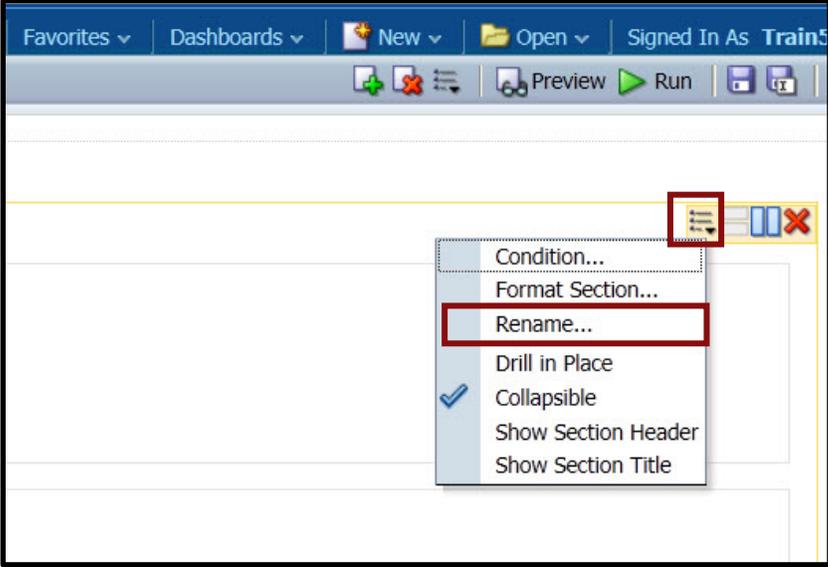
Notes:

Edit a Section

Step	Action
1.	<p>Click the Vertical Layout or Horizontal Layout icons to arrange the objects.</p> <p><i>Figure 115: Dashboard Object Icons</i></p>  <p> Vertical Layout: Arranges items in a Section vertically.</p> <p> Horizontal layout: Arranges items in a Section horizontally.</p>
2.	<p>Select from a menu of additional editing options from the Section Properties drop-down menu.</p> <ul style="list-style-type: none"> • Format Section: Edits the alignment, background color and border color. • Drill in Place: Specifies how the results appear when a user drills in a dashboard report. If this option is selected the original report will be replaced by the drill-down report. • Collapsible: Specifies whether a user can expand and collapse a Section. • Show Section Header: Displays the Section Header in the dashboard. • Show Section Title: Displays the Section Title in the dashboard. <p><i>Figure 116: Dashboard Object Edit Icon Drop-Down Menu</i></p> 
3.	Click the Edit icon corresponding to the Section and select Rename from the

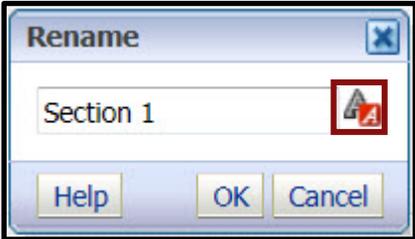
menu of options.

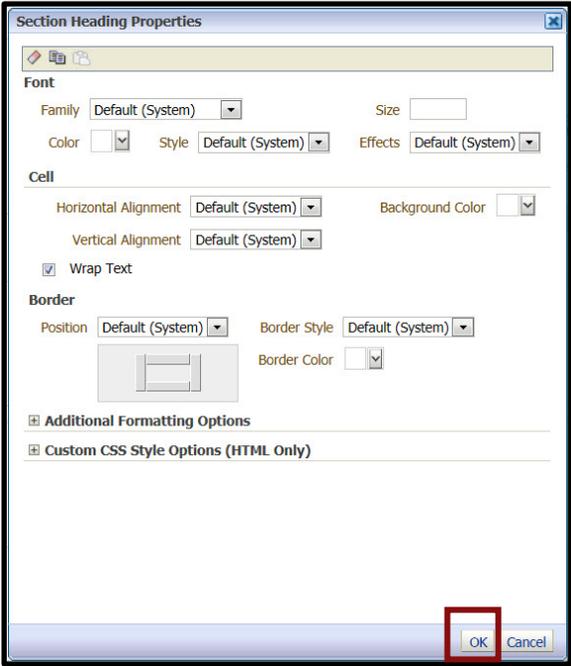
Figure 117: Dashboard Object Edit Icon Drop-Down Menu with Rename Highlighted



4. Enter the desired Section Title name in the text box within the Rename window.

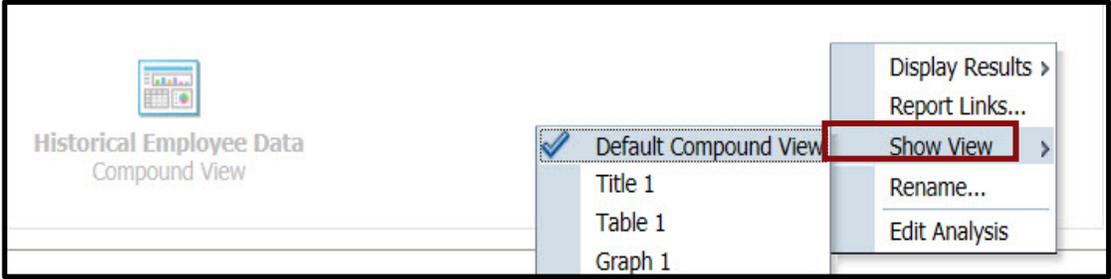
Figure 118: Rename Window



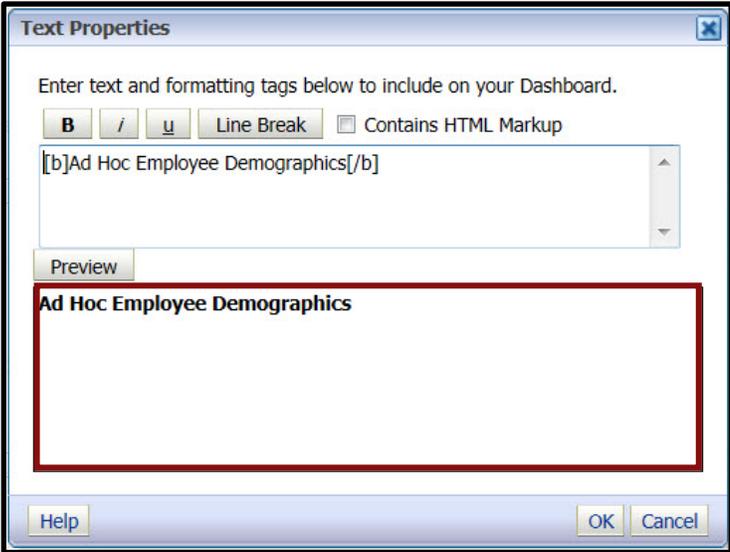
<p>5.</p>	<p>Select the Format icon within the Rename window to customize the Section Heading's font styles, color and other styles and formatting options. Click OK.</p> <p style="text-align: center;"><i>Figure 119: Section Heading Properties Window</i></p> 
<p>6.</p>	<p>Click OK within the Rename window.</p>
<p>7.</p>	<p>Click the Edit icon corresponding to the Section and select Show Section Title to display the customized section title when the dashboard runs.</p>

Notes:

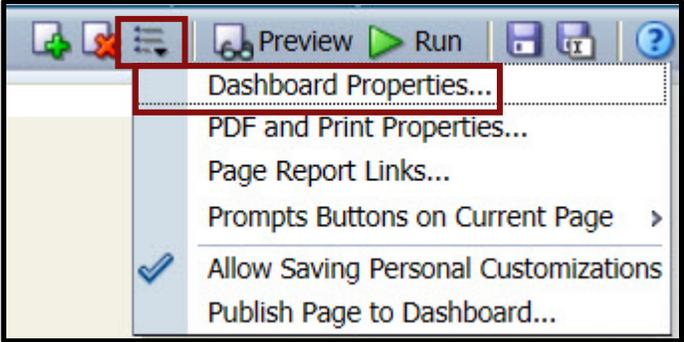
Customize a Report View in a Dashboard

Step	Action
1.	<p>Click on the report's Properties icon.</p> <p><i>Figure 120: Dashboard Report Icons</i></p>  <p>The screenshot shows a dashboard report titled "Employee Count by Grade" in a container labeled "Column 1". The report is currently in a "Compound View" state. A red box highlights a small icon in the top right corner of the report area, which is used to access the report's properties.</p>
2.	<p>Select Show View to open the Show View drop-down menu.</p> <p><i>Figure 121: Dashboard Report Properties Icon Drop-Down Menu and Show View Drop-Down Menu</i></p>  <p>The screenshot shows the "Historical Employee Data" report in its "Compound View" state. A red box highlights the "Show View" option in a drop-down menu that is open over the report icon. The menu also includes options for "Default Compound View", "Title 1", "Table 1", "Graph 1", "Display Results", "Report Links...", "Rename...", and "Edit Analysis".</p>
3.	<p>Select the View (e.g., table, graph, etc.) that will display in the dashboard.</p> <p><i>Figure 122: Dashboard Report View</i></p>  <p>The screenshot shows the dashboard report after the view has been changed. The report now displays a bar chart view, labeled "Graph 1", instead of the compound view. A red box highlights the new graph view.</p>

Edit a Text Section

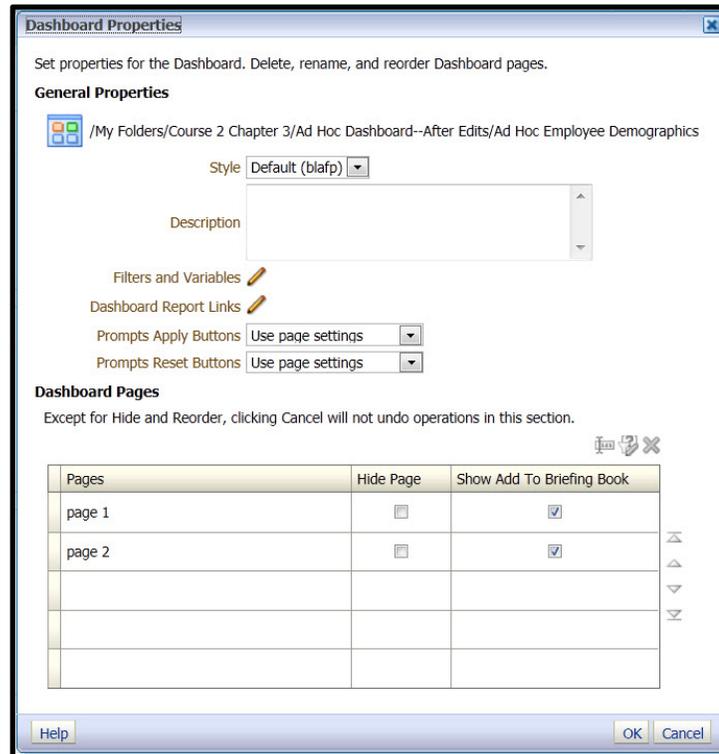
Step	Action
1.	<p>Drag and drop a Text object from the Dashboard Objects pane into an existing Column within the Dashboard workspace.</p> <p><i>Figure 123: Text Dashboard Object within a Dashboard Section</i></p> 
2.	<p>Click the Properties icon corresponding to the Text object.</p>
3.	<p>Enter text and apply the desired formatting by using the formatting options available (e.g., bold, italics, etc.).</p> <p><i>Figure 124: Text Properties Window Preview Section Highlighted</i></p> 

Add and Edit Dashboard Pages

Step	Action
1.	<p>Click the Add Dashboard Page icon from the dashboard top navigation bar to create a new dashboard page.</p> <p><i>Figure 125: Dashboard Navigation Bar with Add Dashboard Page Icon Highlighted</i></p> 
2.	<p>Name the new dashboard page and click OK.</p> <p><i>Figure 126: Add Dashboard Page Window</i></p> 
	<p>IMPORTANT: This name appears within a new page at the top of the Dashboard workspace.</p>
3.	<p>Click the Edit icon from the dashboard navigation bar in the <i>ad hoc dashboard editing</i> page and select Dashboard Properties.</p> <p><i>Figure 127: Dashboard Edit Icon Drop-Down Menu</i></p> 

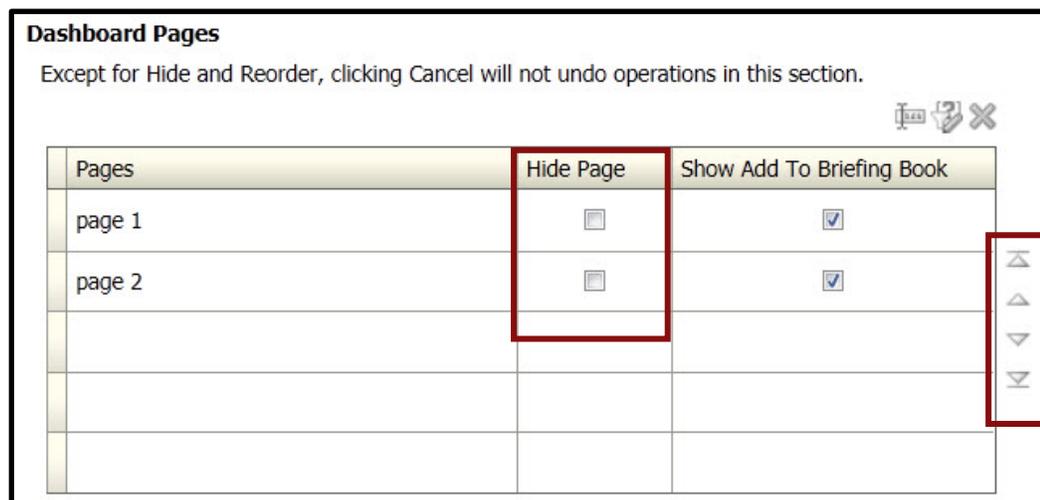
4. View the Dashboard Properties window to customize the Dashboard Page titles that appear within the dashboard, the order in which they appear, naming conventions, etc.

Figure 128: Dashboard Properties Window



5. Choose **Hide Page** or use the arrows to the right of the table to edit the order of the pages from Dashboard Pages.

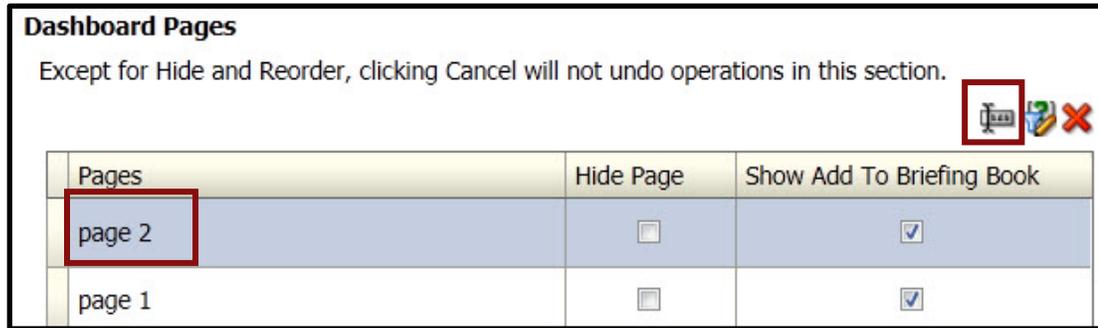
Figure 129: Dashboard Pages Section of the Dashboard Properties Window



6. Select the targeted dashboard page and click the **Rename** icon to rename a page.

Figure 130: Dashboard Pages Section of the Dashboard Properties Window with Rename Icon Highlighted

Dashboard Pages
Except for Hide and Reorder, clicking Cancel will not undo operations in this section.



Pages	Hide Page	Show Add To Briefing Book
page 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
page 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>

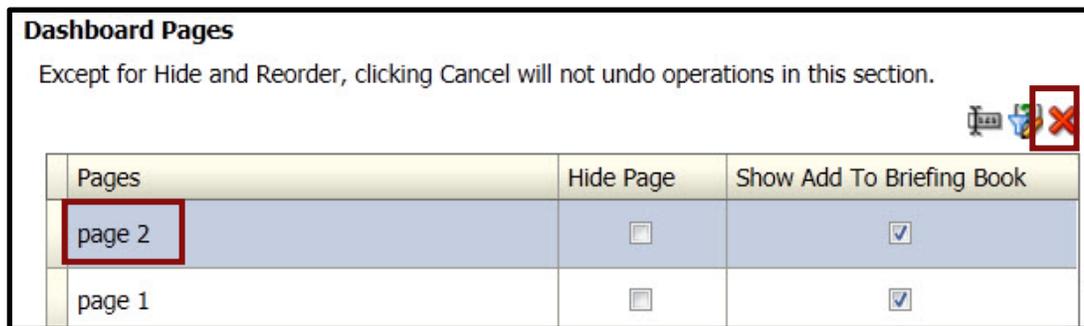


Rename: Renames a dashboard or report components.

7. Select the targeted Dashboard Page and click the **Delete** icon to remove a page.

Figure 131: Dashboard Pages Section of the Dashboard Properties Window with Delete Icon Highlighted

Dashboard Pages
Except for Hide and Reorder, clicking Cancel will not undo operations in this section.

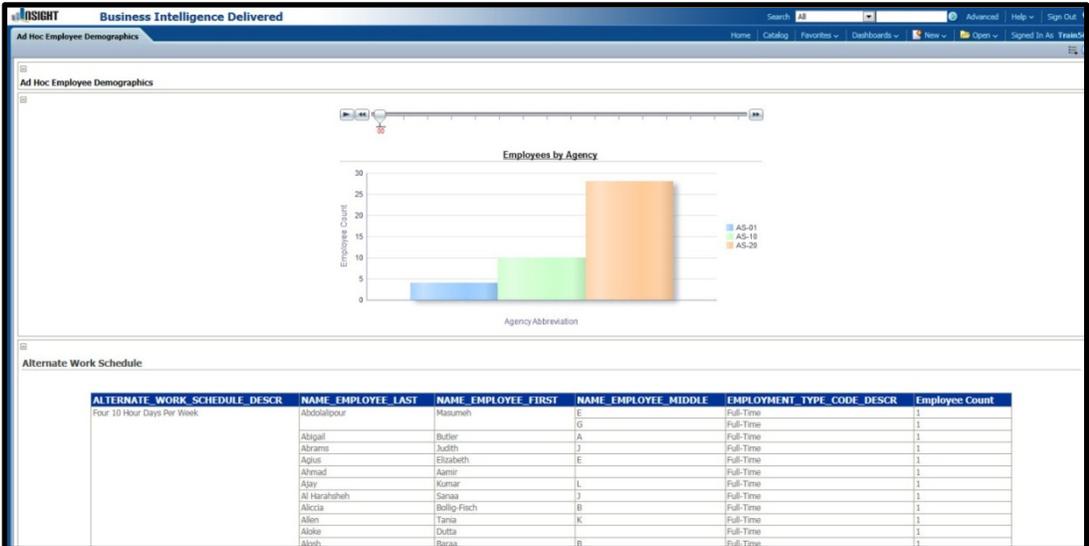


Pages	Hide Page	Show Add To Briefing Book
page 2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
page 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>



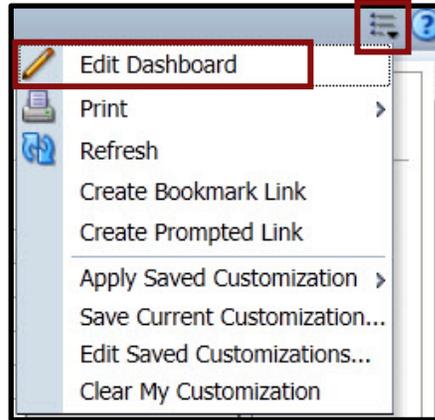
IMPORTANT: Deleting a page permanently removes the page and its contents from a dashboard. Hiding a dashboard page temporarily prevents a dashboard consumer from viewing that page but does not remove the page from the dashboard.

Save and Run a Dashboard

Step	Action																																																																																
1.	<p>Click the Save icon from the dashboard navigation bar to save the Dashboard.</p> <p><i>Figure 132: Dashboard Top Navigation Bar with Save Icon Highlighted</i></p> 																																																																																
2.	<p>Click Run from the dashboard navigation bar to run the dashboard.</p> <p><i>Figure 133: Dashboard Top Navigation Bar with Run Icon Highlighted</i></p>  <p><i>Figure 134: Ad Hoc Dashboard in Run View</i></p>  <p>Employees by Agency</p> <table border="1"> <thead> <tr> <th>Agency Abbreviation</th> <th>Employee Count</th> </tr> </thead> <tbody> <tr> <td>AS-01</td> <td>5</td> </tr> <tr> <td>AS-19</td> <td>10</td> </tr> <tr> <td>AS-29</td> <td>28</td> </tr> </tbody> </table> <p>Alternate Work Schedule</p> <table border="1"> <thead> <tr> <th>ALTERNATE_WORK_SCHEDULE_DESCR</th> <th>NAME_EMPLOYEE_LAST</th> <th>NAME_EMPLOYEE_FIRST</th> <th>NAME_EMPLOYEE_MIDDLE</th> <th>EMPLOYMENT_TYPE_CODE_DESCR</th> <th>Employee Count</th> </tr> </thead> <tbody> <tr> <td>Four 10 Hour Days Per Week</td> <td>Abdolkapour</td> <td>Masumeh</td> <td>G</td> <td>Full-Time</td> <td>1</td> </tr> <tr> <td></td> <td>Abigail</td> <td>Butler</td> <td>A</td> <td>Full-Time</td> <td>1</td> </tr> <tr> <td></td> <td>Abrams</td> <td>Judith</td> <td>J</td> <td>Full-Time</td> <td>1</td> </tr> <tr> <td></td> <td>Agus</td> <td>Elizabeth</td> <td>E</td> <td>Full-Time</td> <td>1</td> </tr> <tr> <td></td> <td>Ahmad</td> <td>Aamir</td> <td></td> <td>Full-Time</td> <td>1</td> </tr> <tr> <td></td> <td>Ajay</td> <td>Kumar</td> <td>L</td> <td>Full-Time</td> <td>1</td> </tr> <tr> <td></td> <td>Al Harahsheh</td> <td>Sanaa</td> <td>J</td> <td>Full-Time</td> <td>1</td> </tr> <tr> <td></td> <td>Alicca</td> <td>Bellig-Rasch</td> <td>B</td> <td>Full-Time</td> <td>1</td> </tr> <tr> <td></td> <td>Allen</td> <td>Tania</td> <td>K</td> <td>Full-Time</td> <td>1</td> </tr> <tr> <td></td> <td>Alske</td> <td>Dutta</td> <td></td> <td>Full-Time</td> <td>1</td> </tr> <tr> <td></td> <td>Alvord</td> <td>Brian</td> <td>B</td> <td>Full-Time</td> <td>1</td> </tr> </tbody> </table>	Agency Abbreviation	Employee Count	AS-01	5	AS-19	10	AS-29	28	ALTERNATE_WORK_SCHEDULE_DESCR	NAME_EMPLOYEE_LAST	NAME_EMPLOYEE_FIRST	NAME_EMPLOYEE_MIDDLE	EMPLOYMENT_TYPE_CODE_DESCR	Employee Count	Four 10 Hour Days Per Week	Abdolkapour	Masumeh	G	Full-Time	1		Abigail	Butler	A	Full-Time	1		Abrams	Judith	J	Full-Time	1		Agus	Elizabeth	E	Full-Time	1		Ahmad	Aamir		Full-Time	1		Ajay	Kumar	L	Full-Time	1		Al Harahsheh	Sanaa	J	Full-Time	1		Alicca	Bellig-Rasch	B	Full-Time	1		Allen	Tania	K	Full-Time	1		Alske	Dutta		Full-Time	1		Alvord	Brian	B	Full-Time	1
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	Alske	Dutta		Full-Time	1																																																																												
	Alvord	Brian	B	Full-Time	1																																																																												

3. Click the **Edit** icon and select **Edit Dashboard** from the drop-down menu to return to the *ad hoc dashboard editing* page.

Figure 135: Dashboard Run View Edit Icon Drop-Down Menu



Notes:

4.4. Customize and Create Ad Hoc Dashboards: Exercises

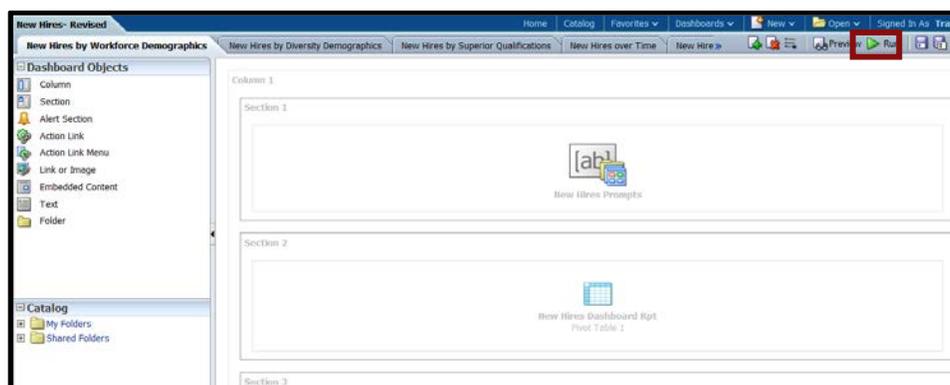
Exercise 4.1: Edit a Common Dashboard

Instructions: Follow the steps below to complete the exercise in *Insight*:

1. Click the **Catalog** action link from the top navigation bar.
2. Expand the **Shared Folders** to navigate to the desired report by expanding the following folders: Shared Folders >> Common Report Library >> Dashboards >> New Hires Dashboard.
- a. Click the Dashboards folder to see folder contents.
3. Click the **More** action link and select **Copy** from the drop-down menu.
4. Navigate to My Folders.
5. From the **Tasks** pane, click the **Paste** icon to add the New Hires Dashboard within My Folders.
6. Select the **Edit** action link corresponding to the New Hires Dashboard.
7. From the **ad hoc dashboard editing page**, navigate to Section 4 and locate the 'New Hire by Pay Plan - Grade' report. Click the **Delete** icon.
8. Drag and drop Section 4 under Section 2.
9. Click on the **Save As** icon from the dashboard navigation bar. Save the dashboard as "New Hires – Revised" in My Folders and click **OK**.
10. Click the **Run** icon.

Check Your Work:

Figure 136: Common Dashboard with Customizations



Exercise 4.2 Create an Ad Hoc Dashboard

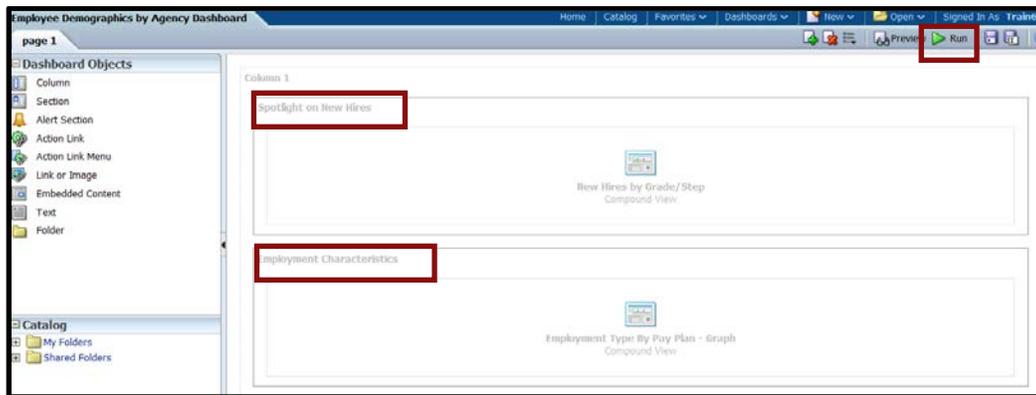
Situation: Allison wants to include two of her weekly reports, “Employment Type by Pay Plan – Graph” and “New Hires by Grade/Step” in a dashboard to ease her reporting routine.

Instructions: Follow the steps below to complete the exercise in *Insight*:

1. From the top navigation bar, click the **New** action link and select **Dashboard**.
2. Within the New Dashboard window, enter the name as “Employee Demographics by Agency Dashboard”.
3. From the location drop-down, select **Browse Catalog**.
4. From the Select Location window, select **My Folders** within the Folders pane. Click **OK**.
 - a. A warning alerting the user that “This dashboard will not appear in the “Dashboards” menu” will pop up. Click **OK**.
5. Click **OK**.
6. Navigate to the **Catalog** pane and expand the My Folders.
7. Within My Folders, locate “Employment Type by Pay Plan – Graph”. Drag and drop the report into the **Dashboard** workspace.
8. Within Section 1, click the **Edit** icon and select **Rename**.
9. Type “Employment Characteristics” in the text box. Click **OK**.
10. Within Section 1 click the **Edit** icon and select **Show Section Title**.
11. From the **Catalog** pane, drag and drop the “New Hires by Grade/Step” report into Column 1 within the **Dashboard** workspace.
12. Within Section 2, click the **Edit** icon and select **Rename**.
13. Type “Spotlight on New Hires” in the text box. Click **OK**.
14. Within Section 2, click the **Edit** icon and select **Show Section Title**.
15. Click the **Save** icon from the dashboard navigation bar.
16. Click the **Run** icon from the dashboard navigation bar.

Check Your Work:

Figure 137: Employee Demographics by Agency Ad Hoc Dashboard



4.5. Chapter Review

Chapter Summary

Having completed this chapter, you should now be able to:

- Demonstrate how to edit a common dashboard
- Demonstrate how to customize a dashboard with styles and formatting
- Demonstrate how to build a dashboard using existing reports

Notes:



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NEW ORLEANS, LA

5.0. Create Filters and Prompts

5.1. Chapter Overview

This chapter will review the unique value and utility of filters and prompts when creating ad hoc reports and dashboards.

Chapter Objectives

After completing this chapter, you will be able to:

- Describe the purpose of filters and prompts
- Demonstrate how to create a new filter within a report
- Demonstrate how to apply a saved filter to an existing report
- Demonstrate how to create a report prompt
- Demonstrate how to create a dashboard prompt

5.2. Purpose of Filters and Prompts

Within *Insight*, users can choose from four different mechanisms to control the amount of restriction applied to data within a report or dashboard. These mechanisms differ by:

- When the mechanism is applied – before, during, or after the report runs.
- If the mechanism is applied the same each time or can change.
- If the mechanism is a visible element of a report or a dashboard.

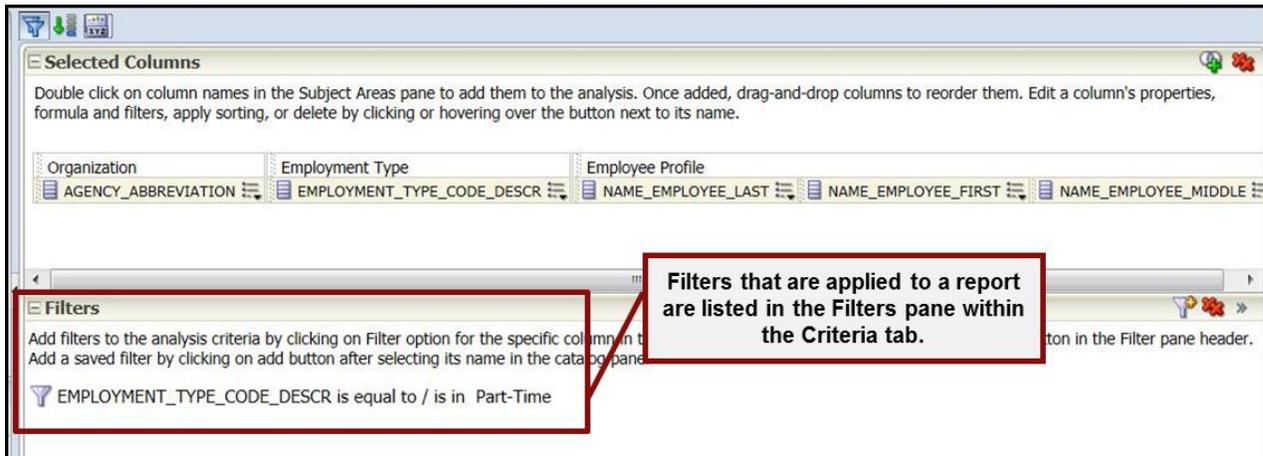
Figure 138: Filters and Prompts

<p style="text-align: center;">Filter</p> <ul style="list-style-type: none"> • Restricts data before the report runs • Applies every time the report runs • Not a visible component of the table or report; works behind the scene of a report 	<p style="text-align: center;">Report Prompt</p> <ul style="list-style-type: none"> • Restricts data within a report each time the report runs • Visible element of the report that appears on a page before the report is in the run view
<p style="text-align: center;">Table Prompt</p> <ul style="list-style-type: none"> • Enables users to select data restrictions after the report runs • May change each time the report runs • Visible element of a table that appears directly above the report table in the run view 	<p style="text-align: center;">Dashboard Prompt</p> <ul style="list-style-type: none"> • Enables users to select data restrictions after the dashboard runs • May change each time the dashboard runs • Visible component of the dashboard in the run view

Filters and Prompts: Filter

Filters are applied within the Criteria tab of the ad hoc report editing page and restrict the data before the report is run.

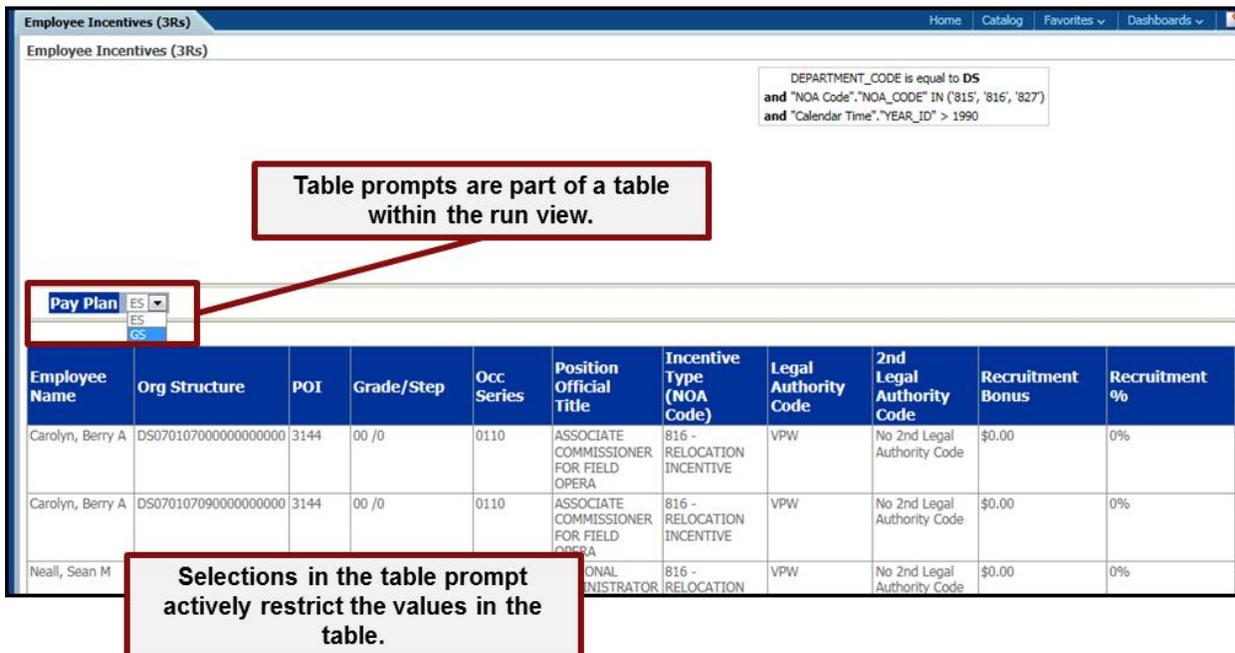
Figure 139: Filters Pane



Filters and Prompts: Table Prompt

Table prompts appear as a component of the report, allowing users to manipulate how data is restricted in the report after it runs.

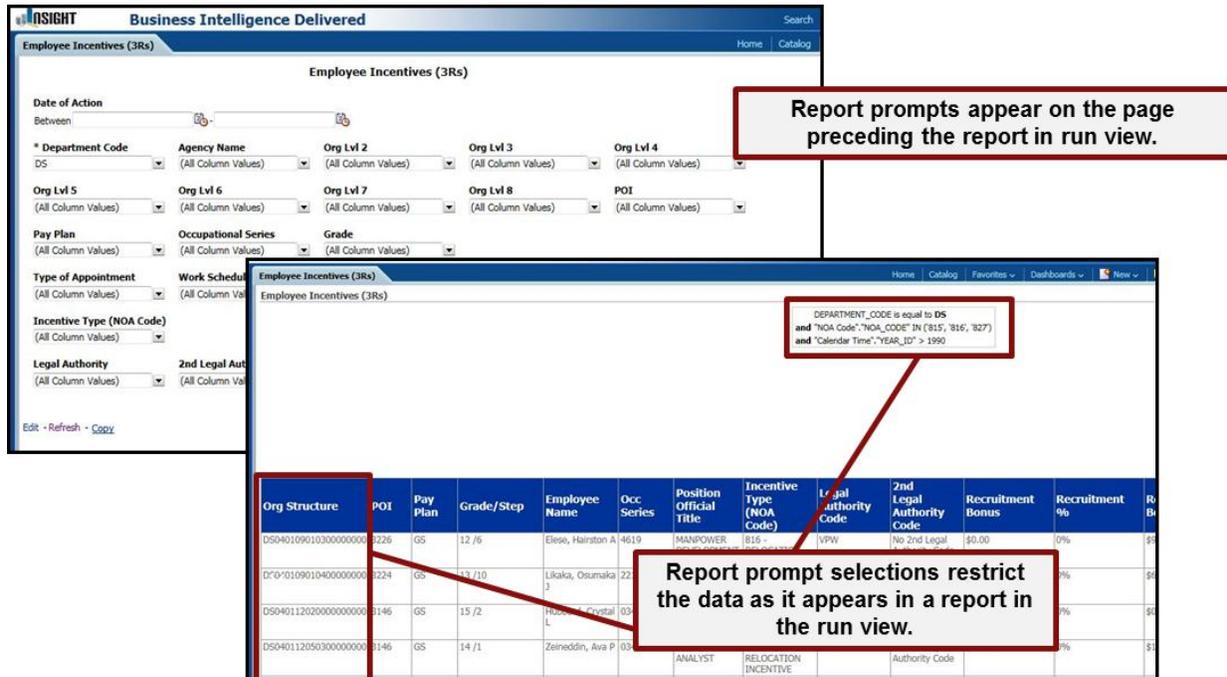
Figure 140: Table Prompt



Filters and Prompts: Report Prompt

Report prompts appear on the page preceding a report in the run view, allowing users to manipulate the restriction on the data each time the report runs.

Figure 141: Report Prompt



Report prompts appear on the page preceding the report in run view.

DEPARTMENT_CODE is equal to DS and 'NOA Code','NOA_CODE' IN ('315', '316', '327') and 'Calendar Time','YEAR_ID' > 1990

Org Structure	POI	Pay Plan	Grade/Step	Employee Name	Occ Series	Position Official Title	Incentive Type (NOA Code)	Legal Authority Code	2nd Legal Authority Code	Recruitment Bonus	Recruitment %
05040109010300000000	0226	GS	12 /6	Elese, Hairston A	4619	MANPOWER	316	VPW	No 2nd Legal	\$0.00	0%
05040109010400000000	0224	GS	11 /10	Likaka, Osumaka J	22						0%
05040112020000000000	0146	GS	15 /2	Hobson, Crystal L	03						0%
05040112050300000000	0146	GS	14 /1	Zaineddin, Ava P	03	ANALYST	RELOCATION INCENTIVE		Authority Code		0%

Report prompt selections restrict the data as it appears in a report in the run view.

Filters and Prompts: Dashboard Prompt

Dashboard prompts appear as a component of the dashboard, enabling users to change the restrictions on the data and immediately see the impact on the dashboard.

Figure 142: Dashboard Prompts



Dashboard prompts are a visible component of the dashboard in the run view.

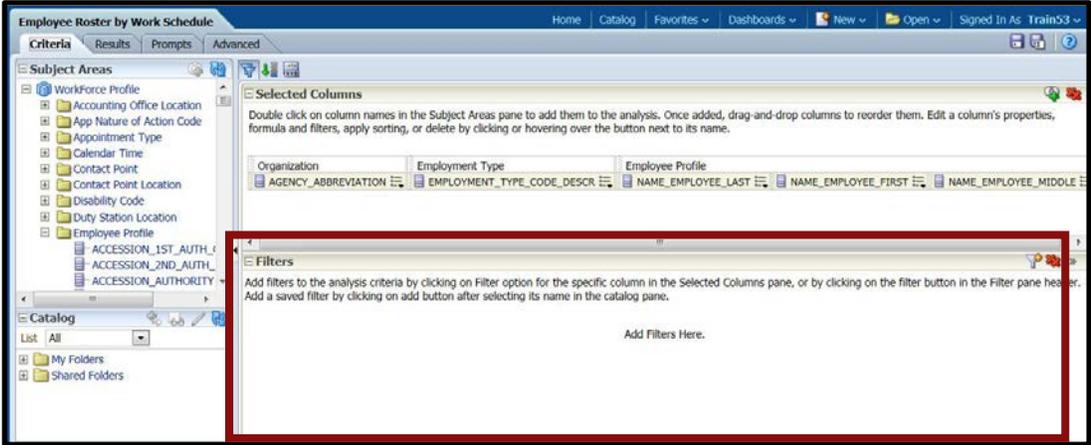
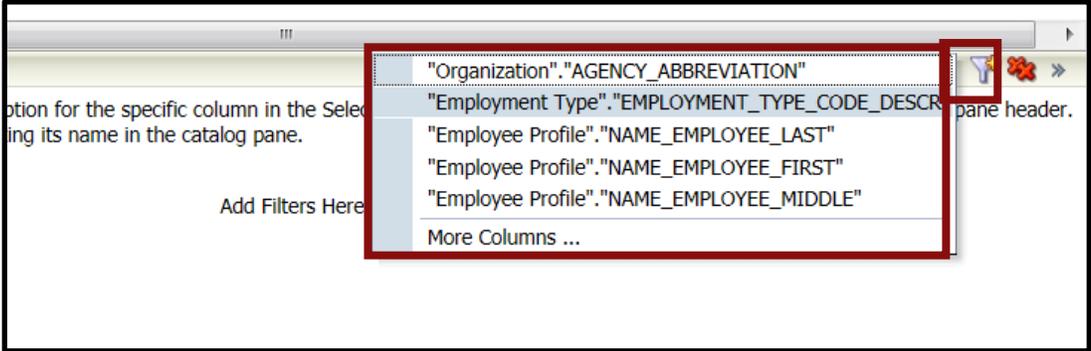
DEPARTMENT_CODE is equal to DS and 'NOA Code','NOA_CODE' IN ('315', '316', '327') and 'Calendar Time','YEAR_ID' > 1990

Allows users to toggle between the amount of restriction on data in the dashboard after it is run.

Occupational Category	Count
ADMINISTRATIVE	16,631
BLUE COLLAR	45,00
CLERICAL	1,00

5.3. Create a New Filter

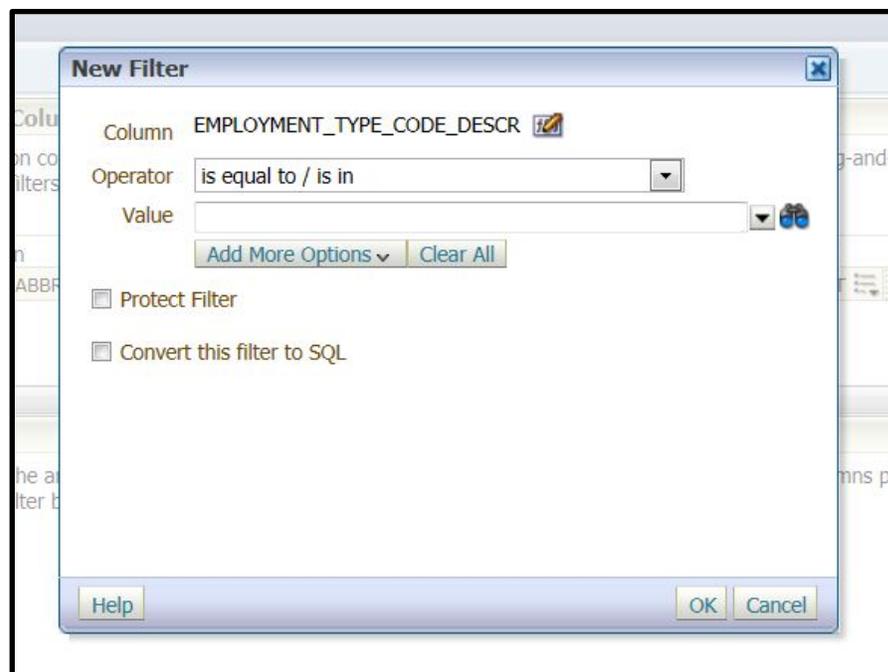
Add Filters from the Filters Pane

Step	Action
1.	<p>Use the Filters pane in the Criteria tab of the ad hoc report editing page to create new filters and view a vertical list of all filters applied to a report.</p> <p style="text-align: center;"><i>Figure 143: Criteria Tab with Filters Pane Highlighted</i></p> 
2.	<p>Click the Filter icon from the Filters pane and select the targeted data element.</p> <p style="text-align: center;"><i>Figure 144: Filters Icon Drop-Down Menu</i></p>  <p> Filter: Restricts the data to a defined set of values.</p>
	<p>IMPORTANT: By selecting More Columns, the user can create a new filter on a data element that has not been identified as a report column.</p>

3. View the New Filter window to customize how the filter restricts data in the report.

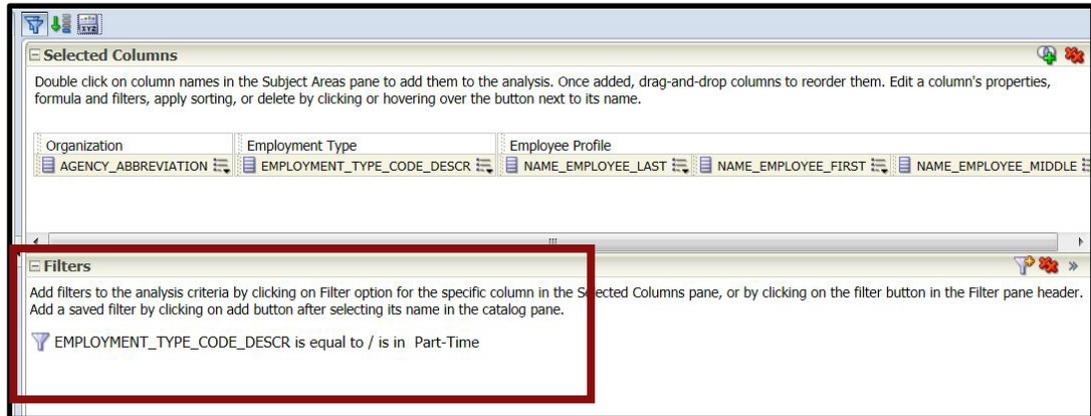
- **Column:** References the data element selected for the new filter.
- **Operator:** Allows users to choose the type of restriction applied to the report (e.g., is equal to, is greater than, etc.).
- **Value:** Allows users to identify the values to be restricted by the filter.
- **Protect Filter:** Prevents the filter from being overridden by other filters or prompts applied to the report.

Figure 145: New Filter Window



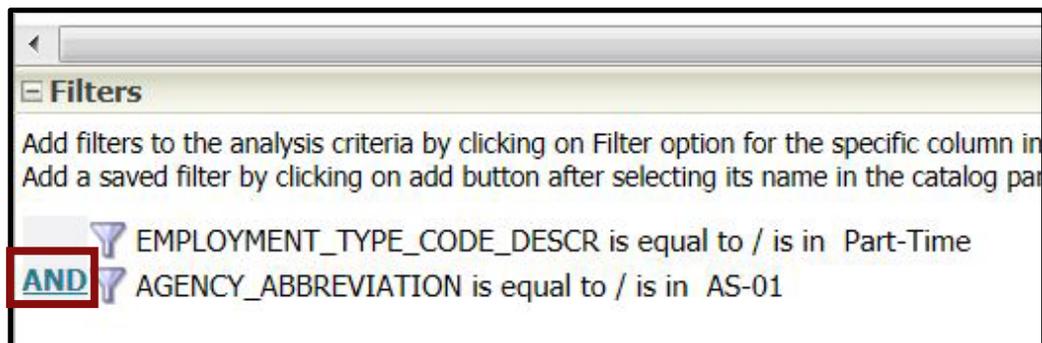
4. Click **OK** to apply updates to the filter. The new filter will list vertically in the **Filters** pane.

Figure 146: Filters Pane with New Filter Highlighted

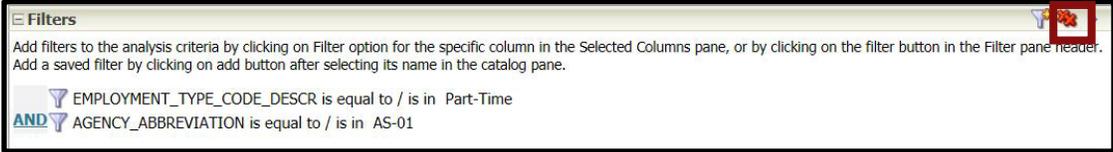
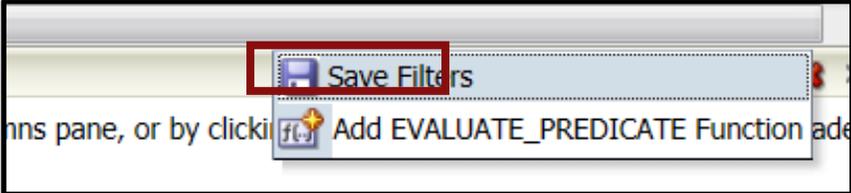


5. When there are multiple filters applied to one report, by default the filters have an “AND” relationship. Click the **AND** action link to change the relationship to “OR”.

Figure 147: Filters Pane with Logic Functionality Highlighted

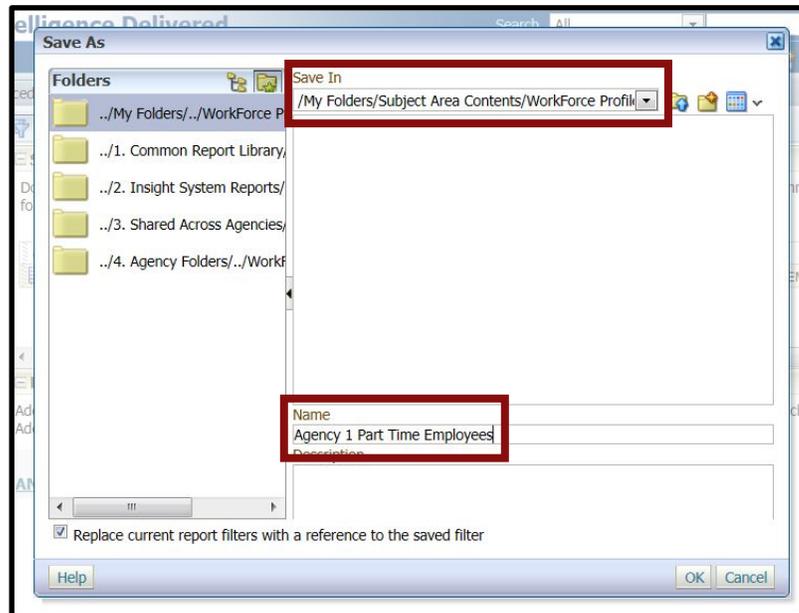


Save a Group of Filters

Step	Action
1.	<p>Click the More Options icon from the <i>Filters</i> pane within the <i>ad hoc report editing</i> page.</p> <p style="text-align: center;"><i>Figure 148: Filters Pane with More Options Icon Highlighted</i></p>  <p>  More Options: Allows users to save a group of filters as an independent item in the Catalog. </p>
2.	<p>Select Save Filters from the menu of options.</p> <p style="text-align: center;"><i>Figure 149: More Options Icon Drop-Down Menu with Save Filters Highlighted</i></p> 

3. Use the Save As window to type the name of the filter in the space provided.

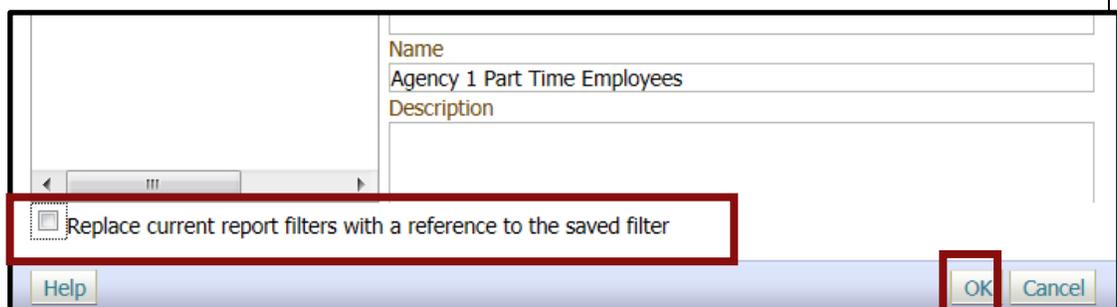
Figure 150: Filter Save As Window



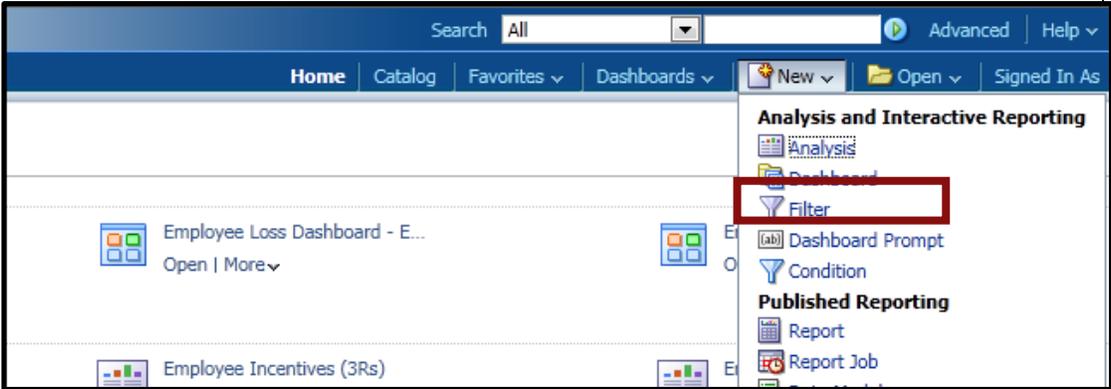
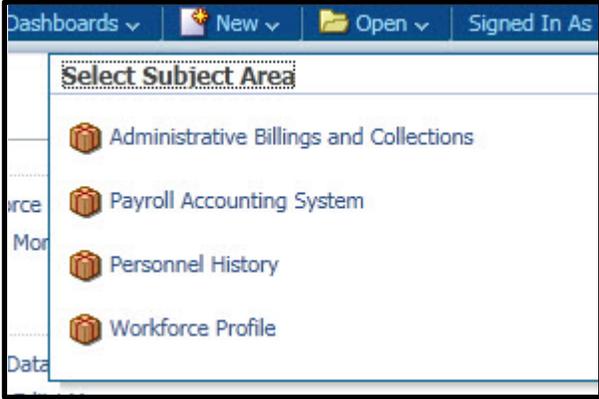
IMPORTANT: By default, *Insight* will recommend the user saves the filter within a folder with the title of the Subject Area from which the item was created (e.g., Workforce Profile). Users should comply with this recommended location in order to use the filter in future reports.

4. A check box at the bottom of the Save As window allows the user to replace the current list of filters with a grouped filter referenced by the saved name. Uncheck this box in order to maintain the ability to edit filters individually. Click **OK**.

Figure 151: Replace current report filters with a reference to the save filter Checkbox

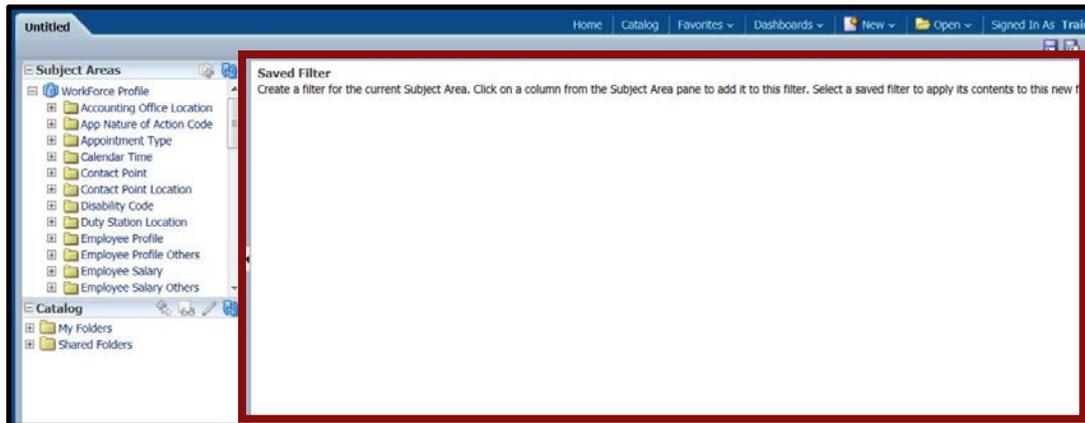


Create a Filter Independent of a Report

Step	Action
1.	<p>Click the New action link from the top navigation bar and select Filter to create a new filter that is an independent item in the Catalog.</p> <p><i>Figure 152: New Action Link Drop-Down Menu with Filter Highlighted</i></p> 
2.	<p>Select the desired Subject Area for the filter.</p> <p><i>Figure 153: Subject Area Drop-Down Menu</i></p> 
	<p>IMPORTANT: The Subject Area of the filter(s) must correspond to the Subject Area used to create the report.</p>

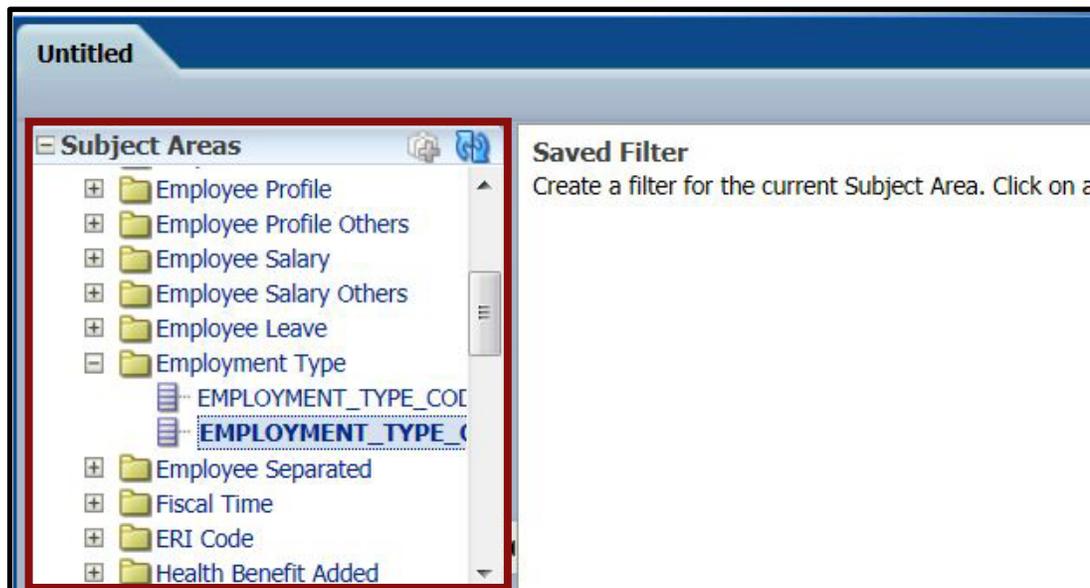
- Use the **New Filter** page to create new filters from data elements in the **Subject Areas** pane. Each filter will list vertically in the **Saved Filter** workspace.

Figure 154: Saved Filter Workspace



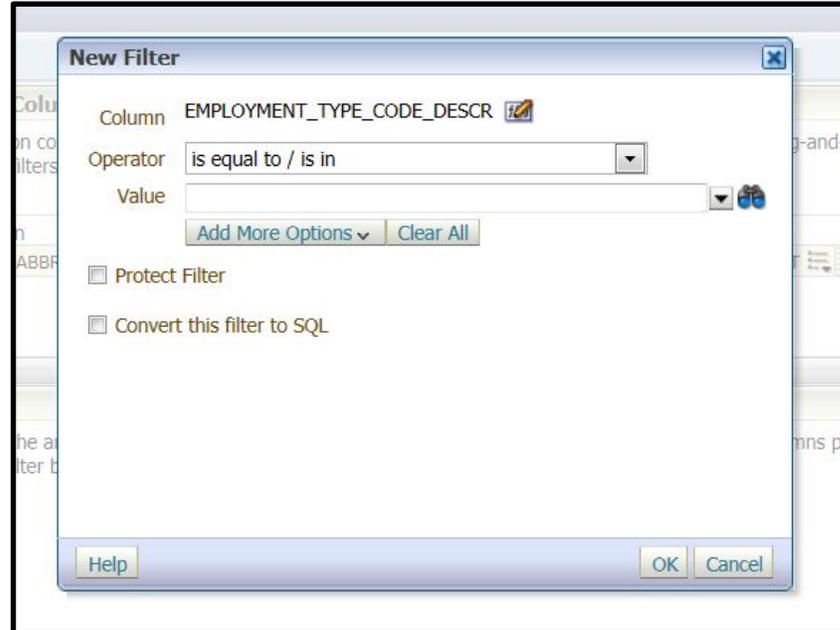
- Navigate to the **Subject Areas** pane and expand folders to identify the targeted data element. Double-click the data element.

Figure 155: Saved Filter Workspace with Subject Areas Pane Highlighted



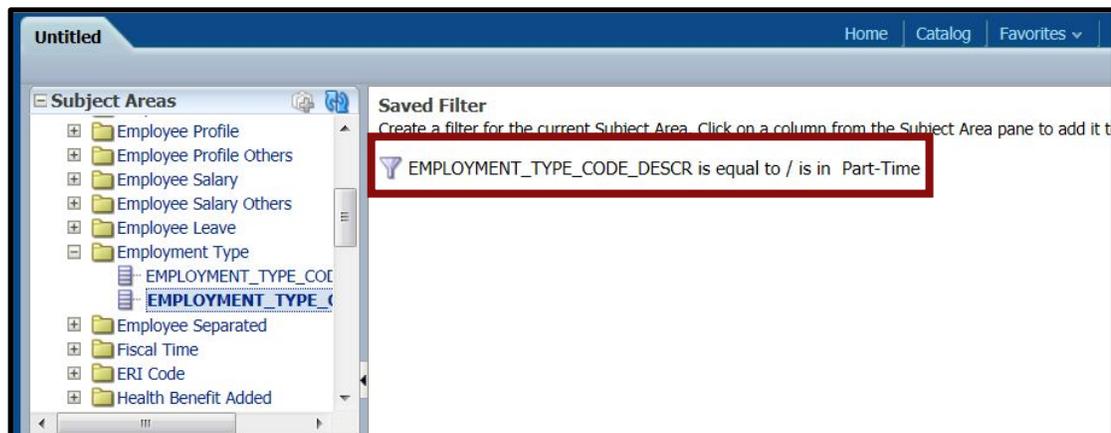
5. Use the New Filter window to choose the Operator (type of filter) and the values which will be impacted by the filter.

Figure 156: New Filter Window



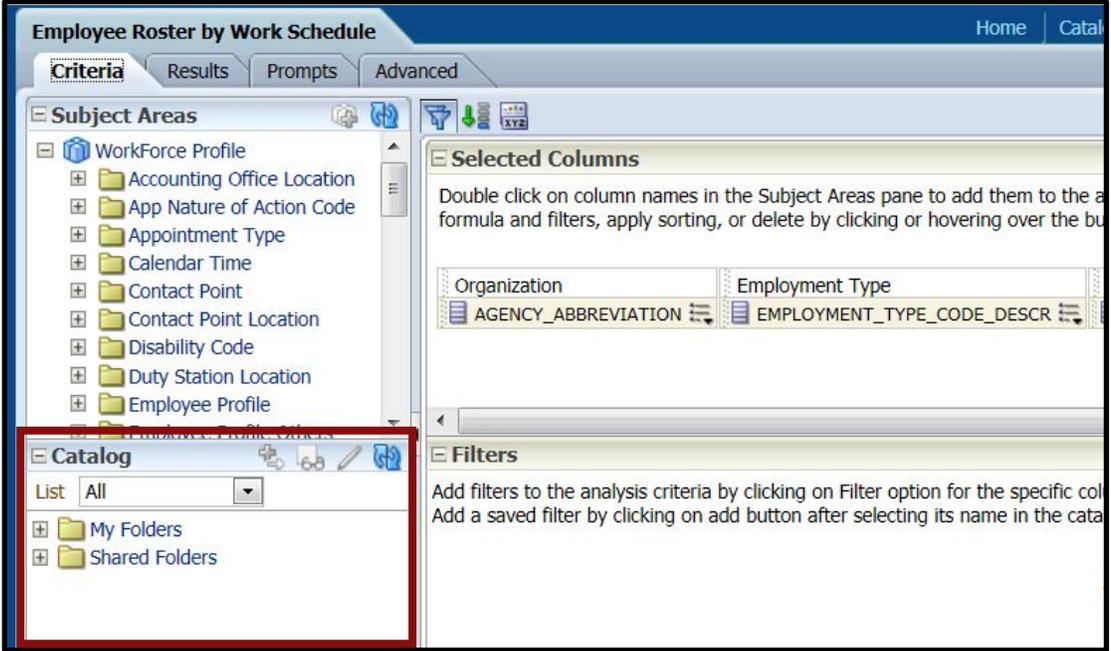
6. Click **OK** to return to the **New Filters** page and view the new filter listed in the **Saved Filter** pane.

Figure 157: Saved Filter Highlighted within the Filters Pane



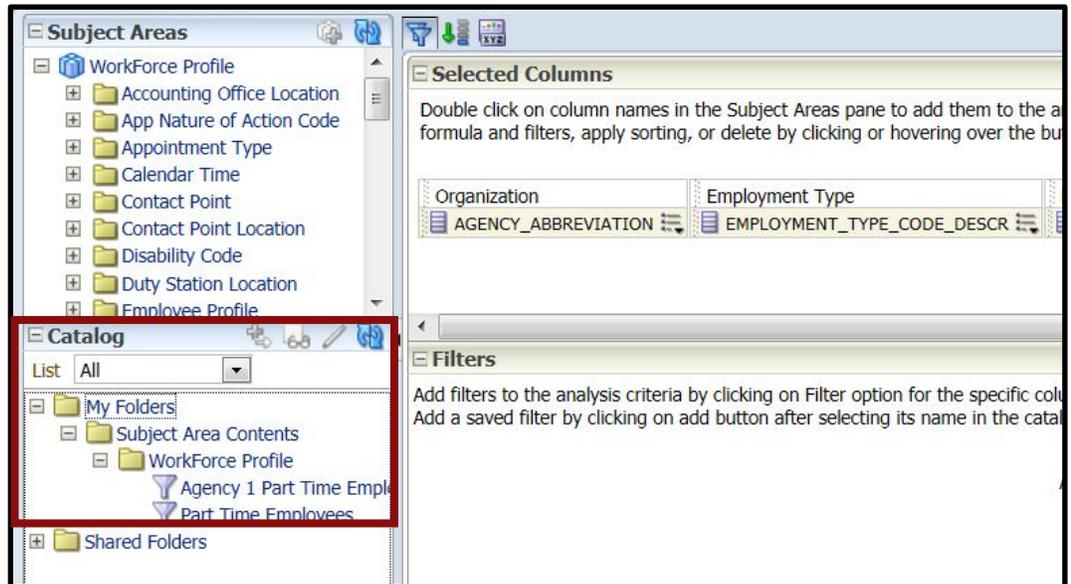
7. Click the **Save As** icon to save the filter.

Apply a Saved Filter to a Report

Step	Action
1.	<p>Navigate to the Catalog pane from the Criteria tab of the ad hoc report editing page.</p> <p style="text-align: center;"><i>Figure 158: Criteria Tab with Catalog Pane Highlighted</i></p> 
	<p>IMPORTANT: When applying a saved filter to a new or existing report, the filter and report must be from the same Subject Area.</p>

2. Navigate to the saved filter from the **Catalog** pane of the **ad hoc report editing** page and double-click the filter name.

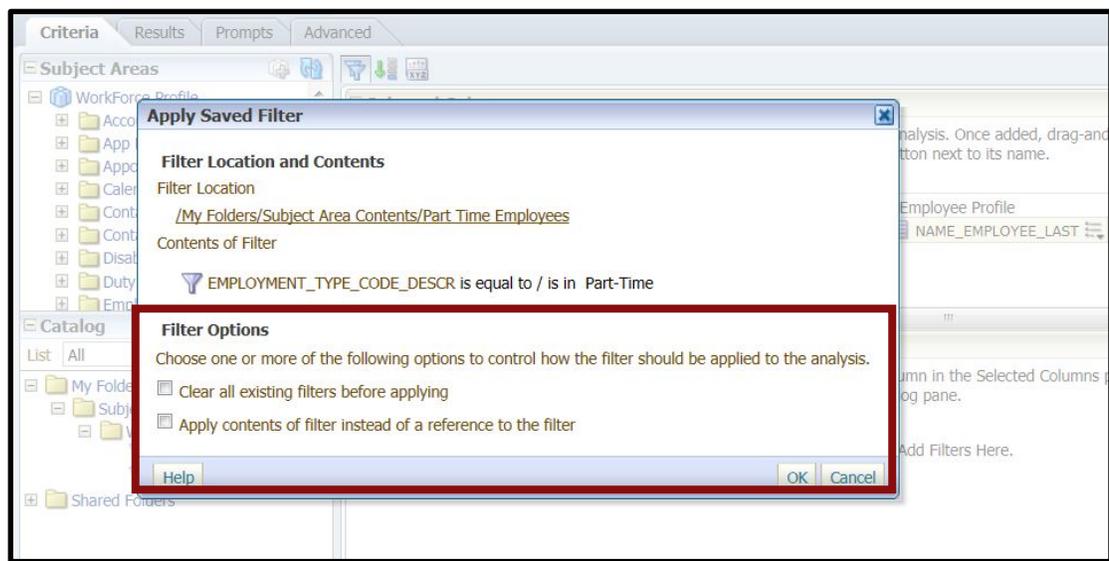
Figure 159: Criteria Tab with Catalog Pane Highlighted



IMPORTANT: Users can apply filters to a report even if the data element is not included within the Selected Columns pane. This acts the same as if the user were to select More Columns when creating a new filter.

3. Use the Filters Options within the Apply Saved Filter window to customize how the filter appears within the report.
- **Clear all existing filters before applying:** Removes all other filters currently listed within the Filters pane.
 - **Apply contents of filter instead of a reference to the filter:** Allows the user to choose whether to control all future updates to the filter in this report, or for the filter to update automatically in this report when it is changed in its source location.

Figure 160: Apply Saved Filter Window with Filter Options Highlighted

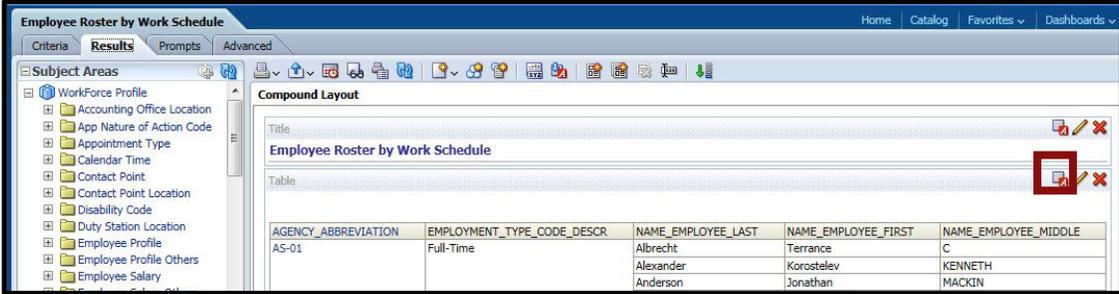
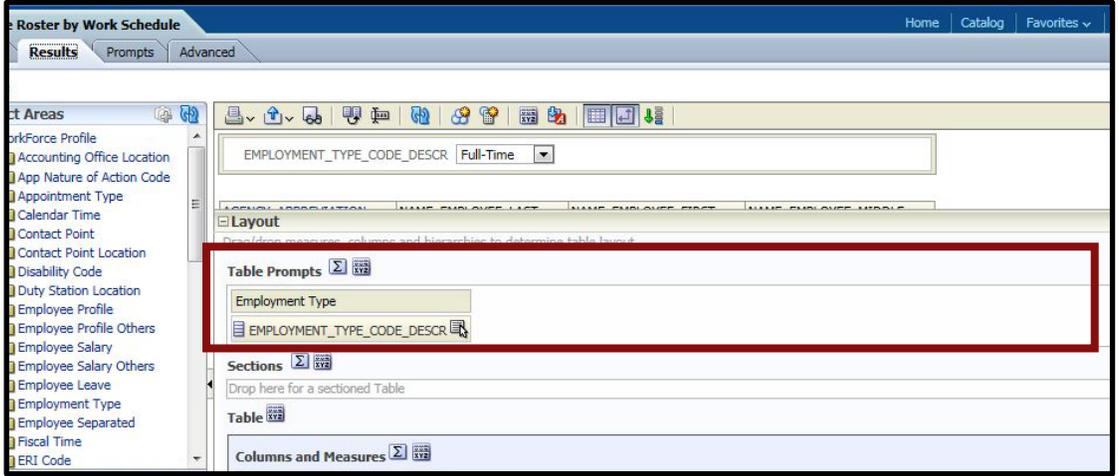


Notes:



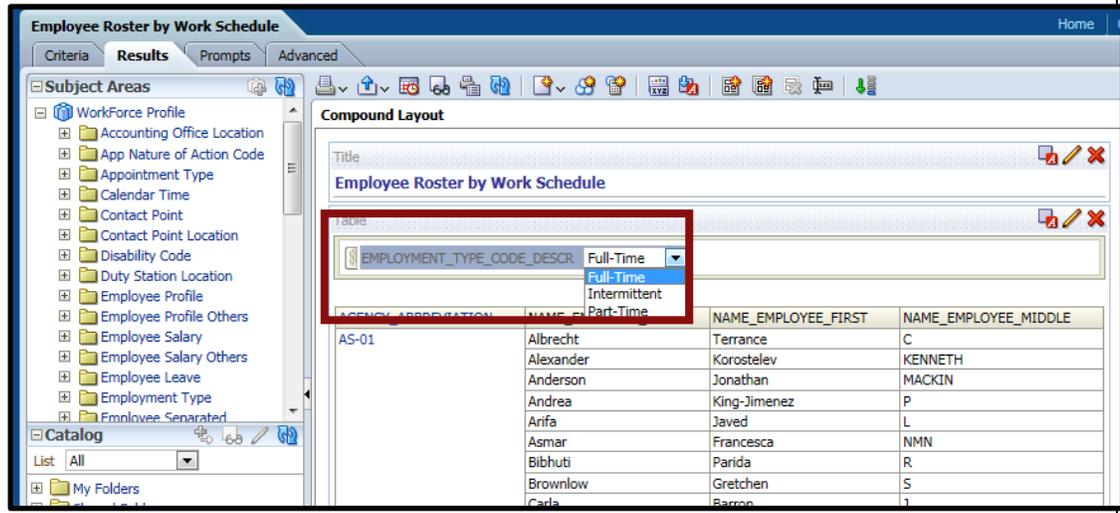
QUICK TIP: Table Prompts

This section is a review of content introduced in Section 3.4 Customize Report Structure.

Step	Action
1.	<p>Click the Edit View icon corresponding to the Table in the Results tab of the ad hoc report editing page,</p> <p style="text-align: center;"><i>Figure 161: Report Table with Edit View Icon Highlighted</i></p> 
2.	<p>Drag the targeted data element to Table Prompts. Click Done.</p> <p style="text-align: center;"><i>Figure 162: Layout Pane with Table Prompts Highlighted</i></p> 

3. View the table prompt above the table which allows users to restrict data within the table.

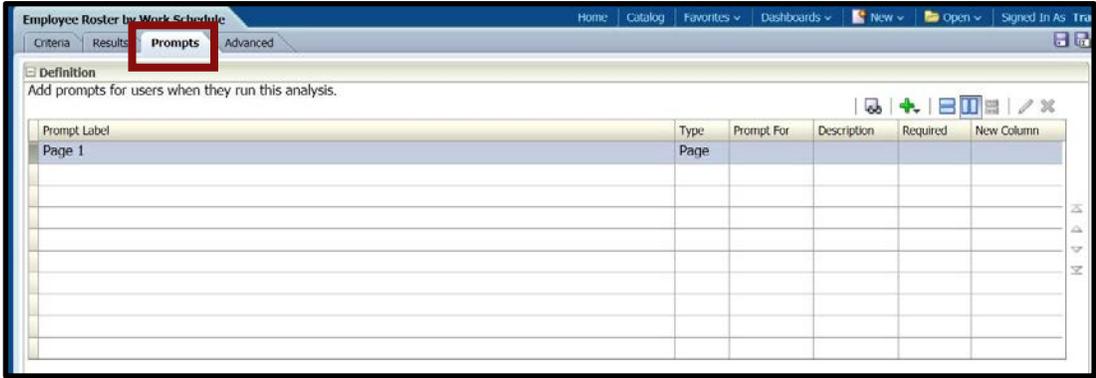
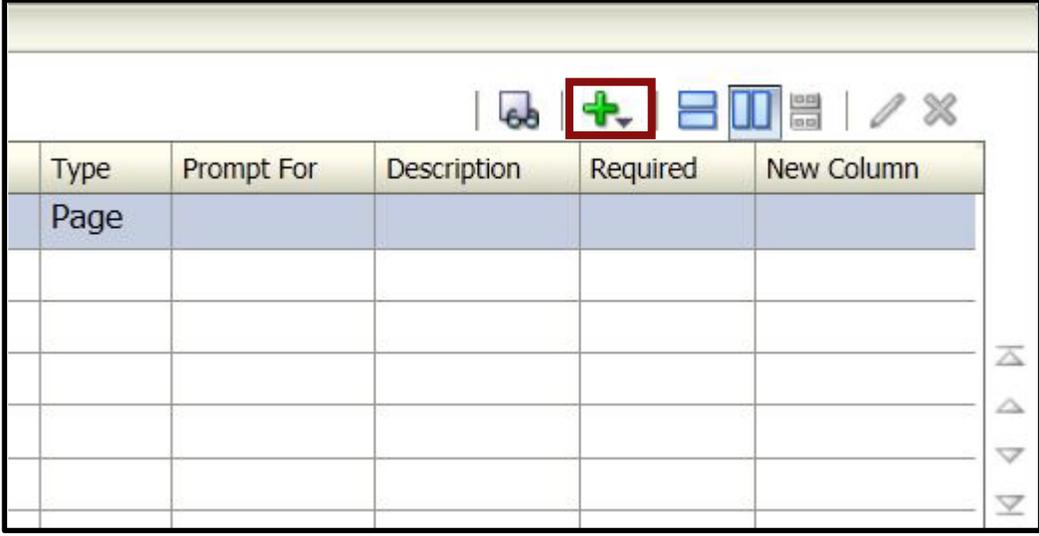
Figure 163: Report Table with a Table Prompt



Notes:

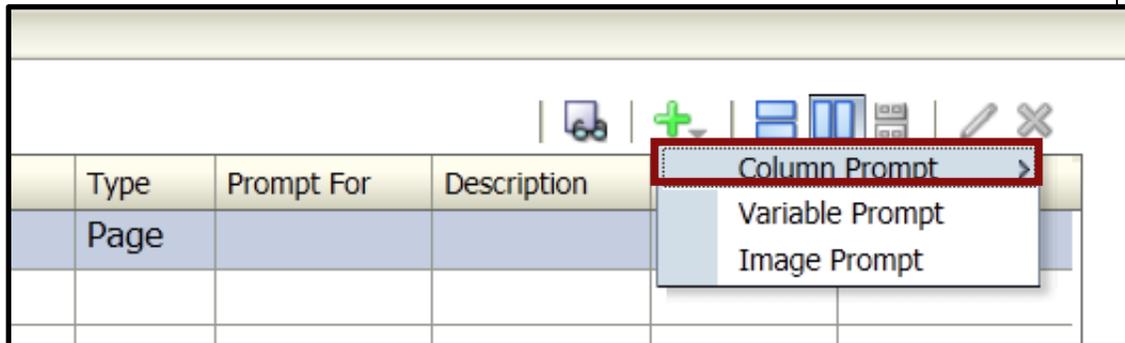
5.4. Create a New Report Prompt

Build Report Prompts

Step	Action
1.	<p>Navigate to the Prompts tab of the <i>ad hoc report editing</i> page.</p> <p><i>Figure 164: Report Prompts Tab</i></p> 
2.	<p>Click the New icon from the Prompts tab navigation bar.</p> <p><i>Figure 165: Prompts Tab Navigation Bar with New Icon Highlighted</i></p> 

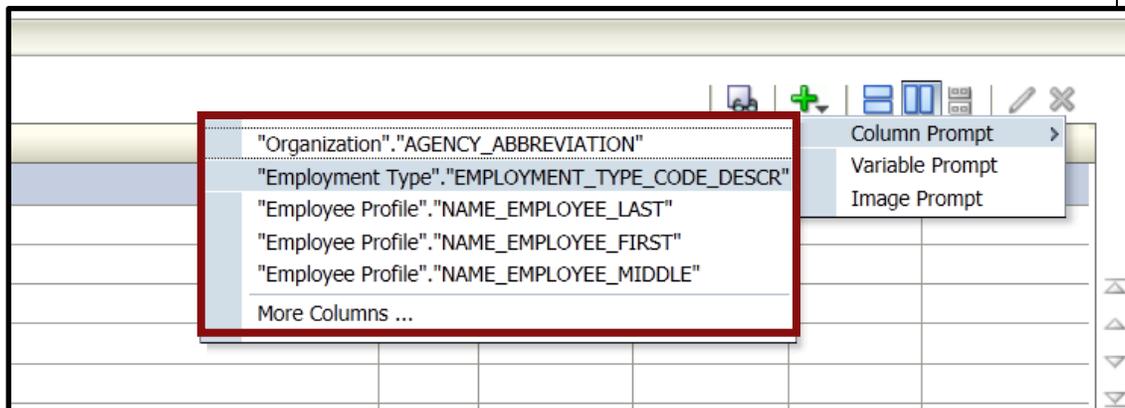
3. Select **Column Prompt** from the menu of options.

Figure 166: New Prompt Icon Drop-Down Menu



4. Select the desired data element from the Column Prompt drop-down menu.

Figure 167: Column Prompt Drop-Down Menu



IMPORTANT: By selecting More Columns, a user can create a report prompt on a data element not represented as a column in the report.

5. View the New Prompt window. This allows the user to customize the prompt.

- **Prompt For Column:** References the selected data element.
- **Label:** Customizes the text that appears next to the prompt.
- **Description:** Customizes the text that appears as a user hovers over the prompt label.
- **Operator:** Allows the user to select the logical operation that will be applied for the prompt (e.g., is equal to, is greater than, is less than, etc.).
- **User Input:** Determines the appearance of the prompt as a text field, choice list, slider, check box, radio button, list box, or calendar.

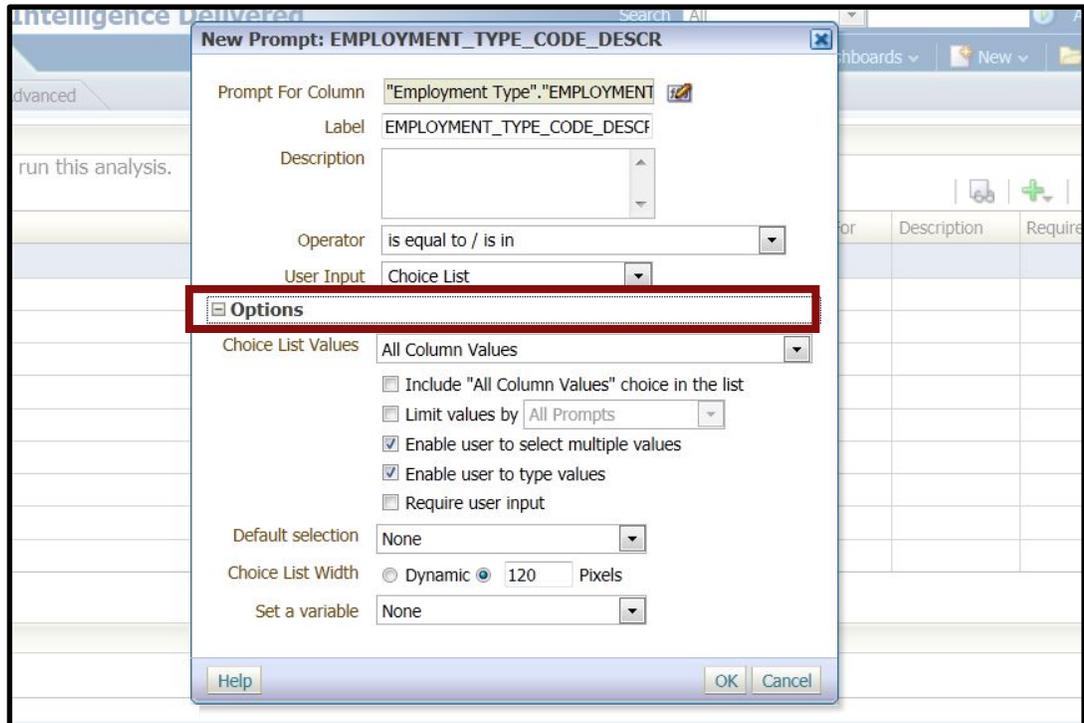
Figure 168: New Prompt Window



IMPORTANT: The User Input options will depend on the type of data being prompted (e.g., Calendar dates are the only data that can be prompted by a calendar selection).

6. Expand **Options** to view additional customizations available to the report prompt, including All Column Values, Require User Input, etc.

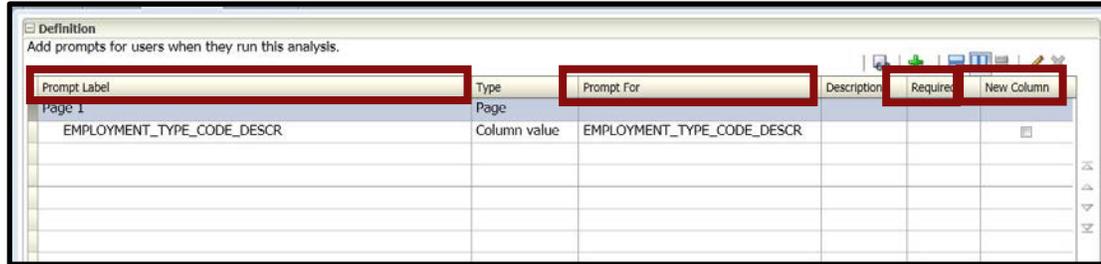
Figure 169: New Prompt Window with Options Section Highlighted



7. Click **OK** to return to the **Prompts** tab.

8. View the prompt listed vertically within the **Prompts** workspace, documenting the Prompt Label, Prompted For (data element targeted by the prompt), etc.

Figure 170: Prompts Workspace with Columns Highlighted



Prompt Label	Type	Prompt For	Description	Required	New Column
EMPLOYMENT_TYPE_CODE_DESCR	Column value	EMPLOYMENT_TYPE_CODE_DESCR			<input type="checkbox"/>



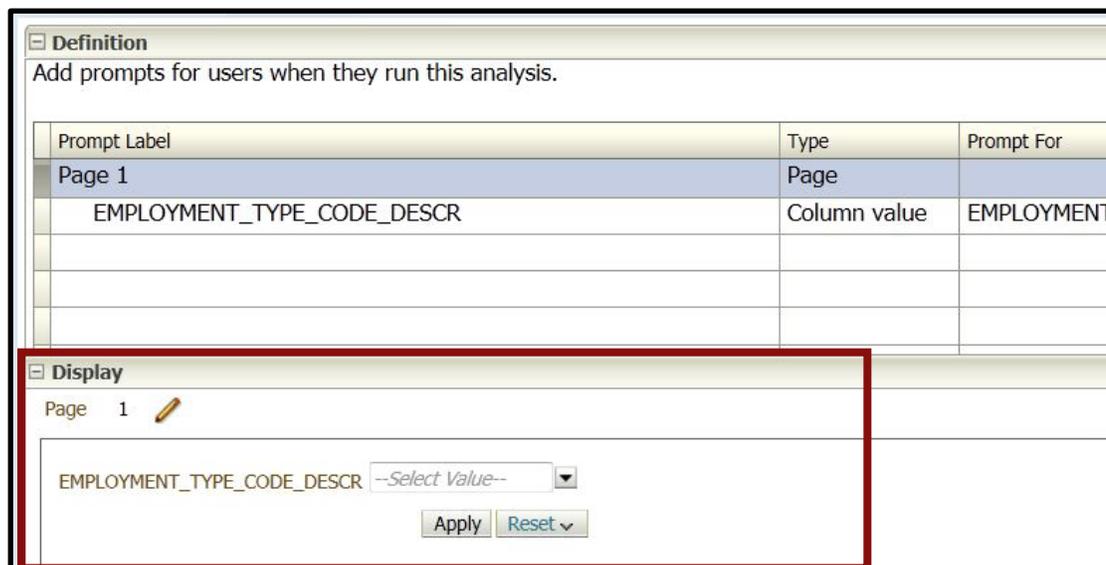
TIP: The New Column check box will update based on the user's selection of the Horizontal Layout icon and the Vertical Layout icon which structures the prompts page layout.



TIP: The arrows along the right side of the Prompts workspace allow the user to change the order of the prompts on the Prompts page.

9. The **Display** pane previews the report prompts as they will appear on the Prompts page preceding the report in run view.

Figure 171: Prompts Workspace with Prompt Preview Highlighted



Prompt Label	Type	Prompt For
EMPLOYMENT_TYPE_CODE_DESCR	Column value	EMPLOYMENT

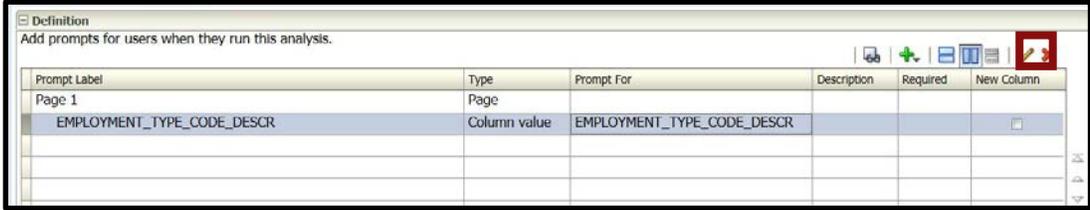
Display

Page 1 

EMPLOYMENT_TYPE_CODE_DESCR --Select Value-- 

10. Select the desired prompt and click the **Delete** icon to remove the prompt from the report.

Figure 172: Prompts Workspace with Delete Icon Highlighted



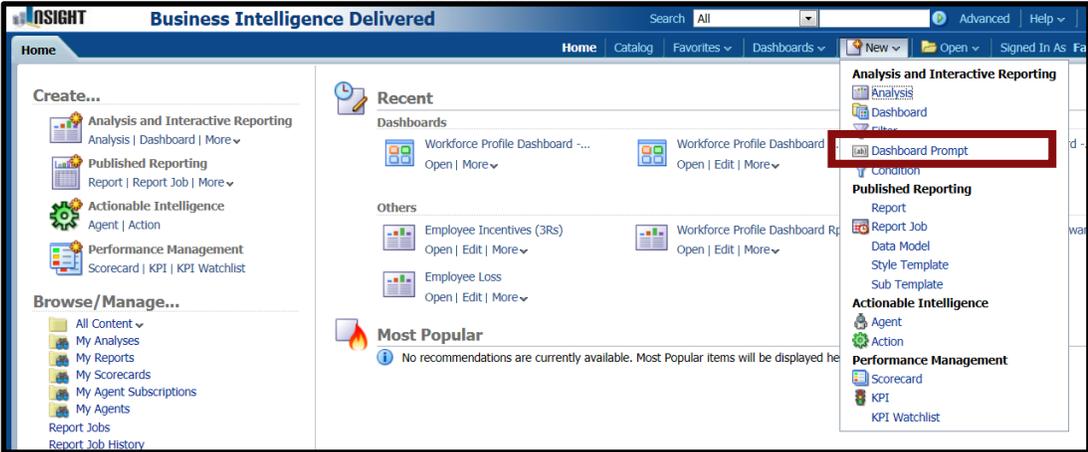
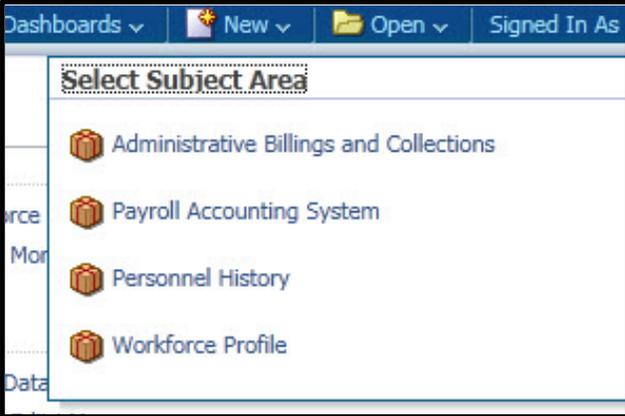
Prompt Label	Type	Prompt For	Description	Required	New Column
Page 1	Page				
EMPLOYMENT_TYPE_CODE_DESCR	Column value	EMPLOYMENT_TYPE_CODE_DESCR			<input type="checkbox"/>

 **TIP:** Once the user selects the prompt, it will be highlighted in blue in the Prompts workspace.

Notes:

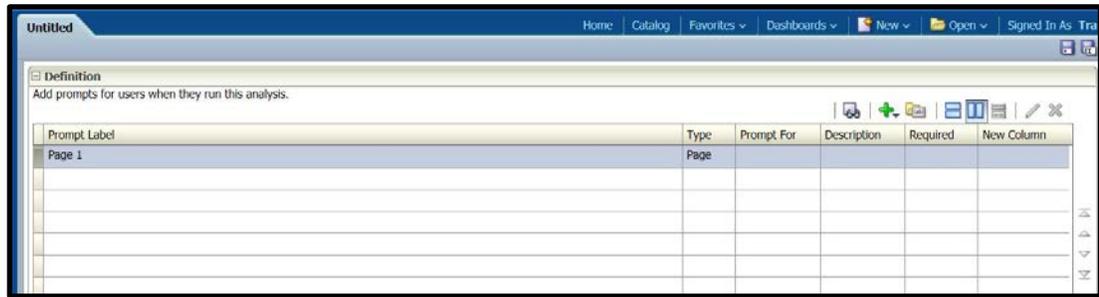
5.5. Create a New Dashboard Prompt

Build Dashboard Prompts

Step	Action
1.	<p>Click the New action link from the top navigation bar and select Dashboard Prompt to create a new dashboard prompt.</p> <p><i>Figure 173: New Action Link Drop-Down Menu with Dashboard Prompts Highlighted</i></p>  <p>The screenshot shows the ISIGHT Business Intelligence Delivered interface. The top navigation bar includes 'Home', 'Catalog', 'Favorites', 'Dashboards', and 'New'. The 'New' dropdown menu is open, showing options like 'Analysis and Interactive Reporting', 'Dashboard', 'Dashboard Prompt', 'Published Reporting', 'Actionable Intelligence', and 'Performance Management'. The 'Dashboard Prompt' option is highlighted with a red box.</p>
2.	<p>Select the Subject Area from which the prompt will be created.</p> <p><i>Figure 174: Subject Area Drop-Down Menu</i></p>  <p>The screenshot shows a 'Select Subject Area' drop-down menu. The menu is open, displaying a list of subject areas: 'Administrative Billings and Collections', 'Payroll Accounting System', 'Personnel History', and 'Workforce Profile'. Each item is accompanied by a small icon.</p>

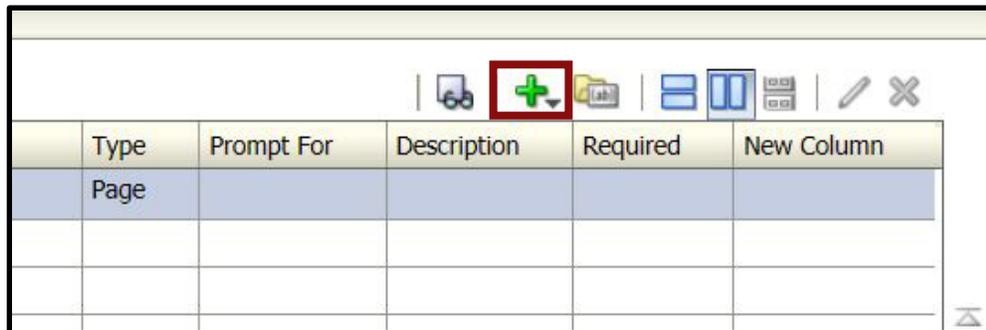
3. View the **Prompts** page to build and customize dashboard prompts.

Figure 175: Dashboard Prompts Page



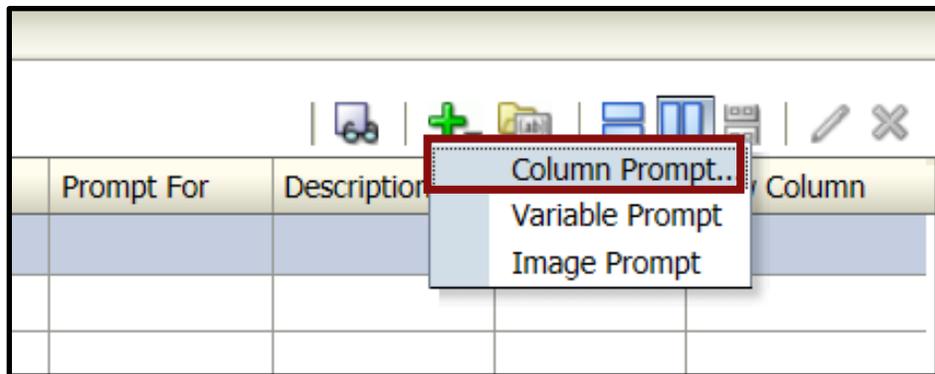
4. Click the **New** icon from the **Prompts** page navigation bar.

Figure 176: Dashboard Prompts Page with New Icon Highlighted



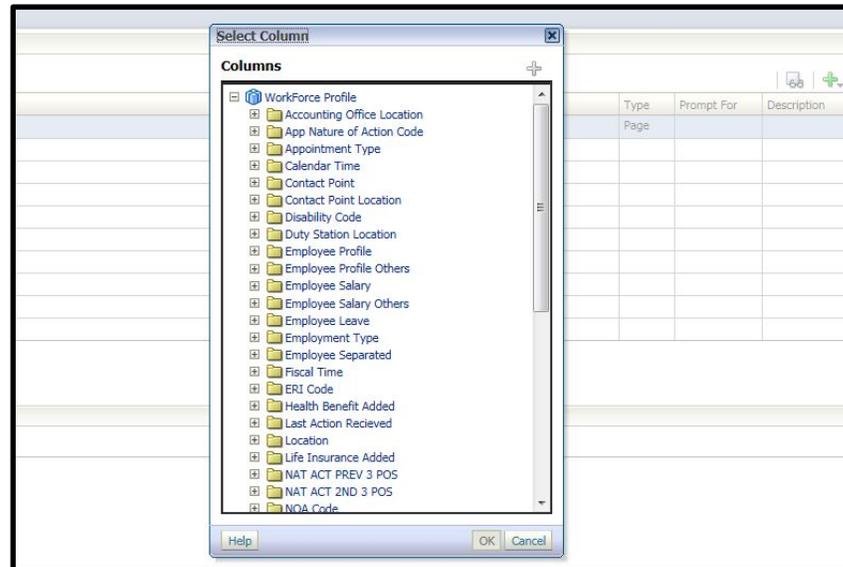
5. Select **Column Prompt** from the menu of options.

Figure 177: New Icon Drop-Down Menu with Column Prompt Highlighted



6. Navigate the folders to the data element for the dashboard prompt within the Select Columns window.

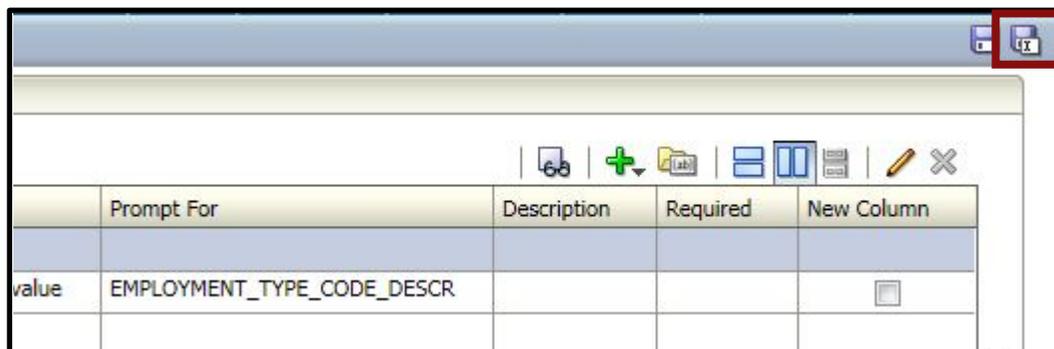
Figure 178: Selected Columns Window



IMPORTANT: Reference the steps in Section 5.4 Create a New Report Prompt.

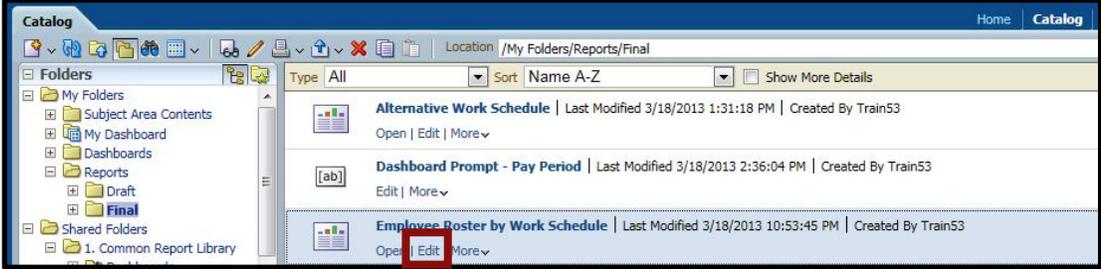
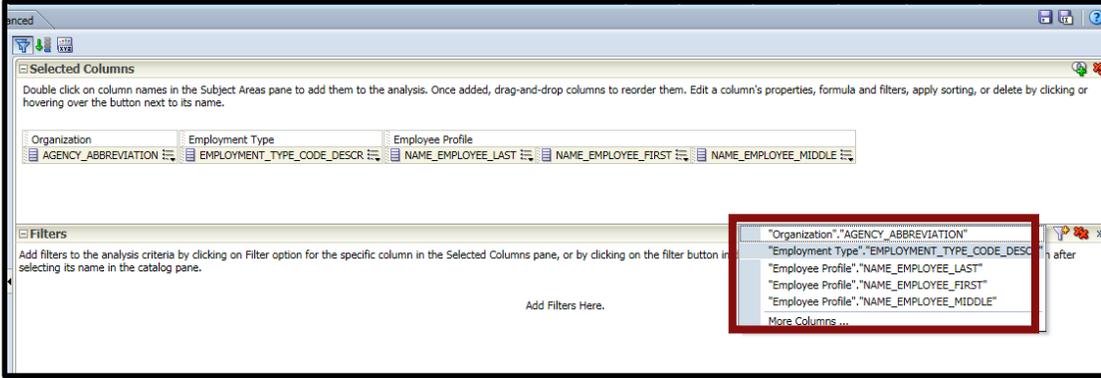
7. Click the **Save As** icon from the Prompts page navigation bar.

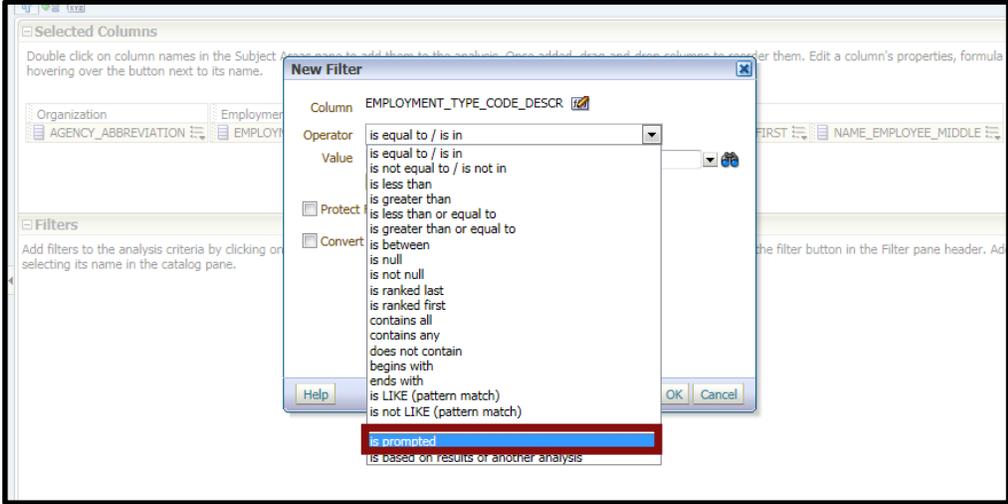
Figure 179: Prompts Page with Save As Icon Highlighted



IMPORTANT: Before the dashboard prompt will work, each report in the dashboard will need to be updated with the filter “Is Prompted” on the corresponding data element in order to restrict the report upon users’ selection.

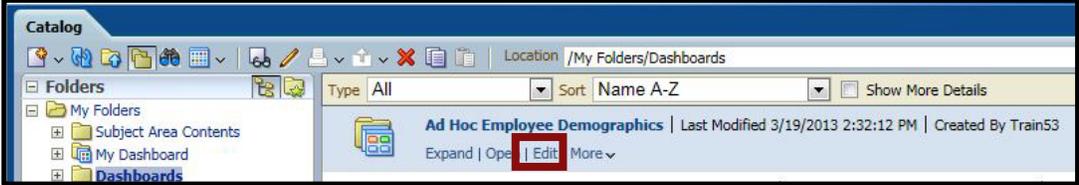
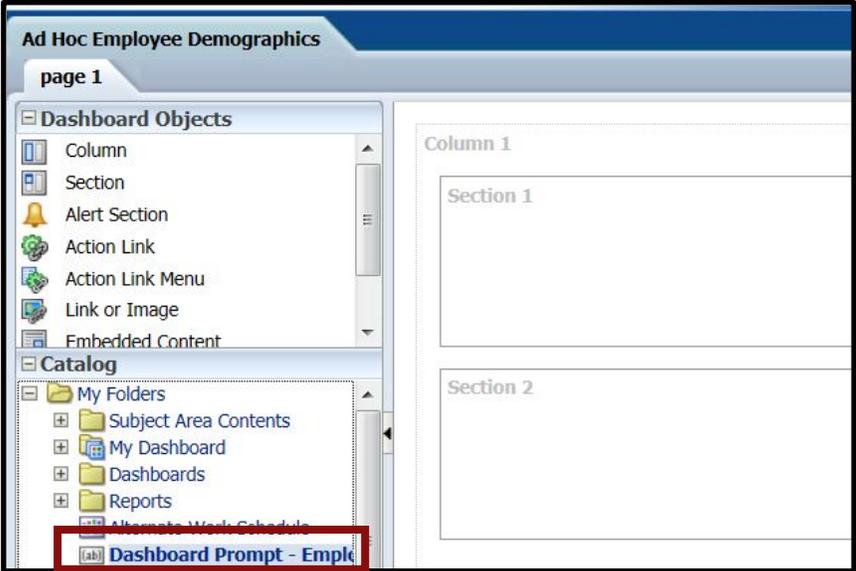
Link Dashboard Prompts to Reports in the Dashboard

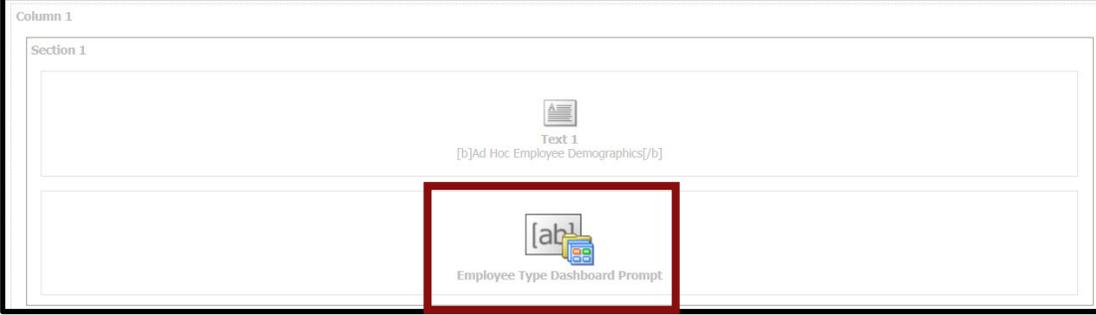
Step	Action
1.	Click the Catalog action link from the top navigation bar.
2.	<p>Navigate to the report which will be impacted by the dashboard prompt and click the corresponding Edit action link to open the <i>ad hoc report editing</i> page.</p> <p style="text-align: center;"><i>Figure 180: Report in Catalog with Edit Action Link Highlighted</i></p> 
3.	<p>Click the Filters icon from the Filters pane in the Criteria tab and select the data element used to create the dashboard prompt.</p> <p style="text-align: center;"><i>Figure 181: Filters Icon Drop-Down Menu</i></p> 
	<p>TIP: If the data element is not listed in the Selected Columns pane it will not appear in the drop-down menu. Use More Columns to access a full list of data elements in the Subject Areas pane.</p>

<p>4.</p>	<p>Navigate to the Operator drop-down menu from the New Filter window and select Is Prompted.</p> <p><i>Figure 182: New Filter Window with Operator Drop-Down Menu and Is Prompted Highlighted</i></p> 
	<p>IMPORTANT: Users should repeat this step for each data element in each report impacted by a dashboard prompt.</p>
<p>5.</p>	<p>Click OK.</p>
<p>6.</p>	<p>Click the Save icon to save changes to the report.</p>

Notes:

Add Dashboard Prompts to a Dashboard

Step	Action
1.	Navigate to the dashboard in the Catalog which will be impacted by the dashboard prompt.
2.	<p>Click the Edit action link for the desired dashboard.</p> <p><i>Figure 183: Dashboard in Catalog with Edit Action Link Highlighted</i></p>  <p>The screenshot shows a web interface titled 'Catalog' with a navigation pane on the left containing 'My Folders', 'Subject Area Contents', 'My Dashboard', and 'Dashboards'. The main area displays 'Ad Hoc Employee Demographics' with metadata and action links: 'Expand', 'Open', 'Edit' (highlighted in red), and 'More'.</p>
3.	<p>From the Catalog pane, locate the saved dashboard prompt.</p> <p><i>Figure 184: Ad Hoc Dashboard Editing Page with Dashboard Prompt in Catalog Pane Highlighted</i></p>  <p>The screenshot shows the 'Ad Hoc Employee Demographics' editing page. On the left, there are two panes: 'Dashboard Objects' and 'Catalog'. The 'Catalog' pane shows a tree view with 'My Folders', 'Subject Area Contents', 'My Dashboard', 'Dashboards', 'Reports', and 'Alternate Work Schedules'. The 'Dashboard Prompt - Employee' item is highlighted in red.</p>

4.	<p>Drag and drop the dashboard prompt to the desired location in the dashboard.</p> <p><i>Figure 185: Dashboard Workspace with Prompt Highlighted</i></p> 
5.	<p>Click the Save icon to save changes before running the dashboard.</p>

Notes:

5.6. Create Filters and Prompts: Exercises

Exercise 5.1: Create a Filter Independent of a Report

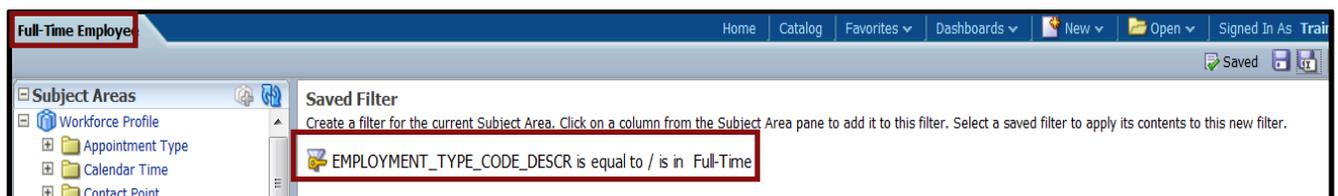
Situation: Carrie runs a large number of reports highlighting different aspects her agency’s workforce. For many of these reports, she only needs to see data on the full-time employees.

Instructions: Follow the steps below to complete the exercise in *Insight*:

1. Click the **New** action link from the top navigation bar.
2. Select **Filter** from the menu of options.
3. From the Select Subject Area window, select **Workforce Profile**.
4. Within the **Subject Areas** pane, expand the “Employment Type” folder and double-click on “EMPLOYMENT_TYPE_CODE_DESCR”.
5. Within the New Filter window, make the following selections:
 - a. Operator = “is equal to / is in”
 - b. Value = Full-Time
6. Click **OK**.
7. Click the **Save As** icon.
8. From the Save As window, save the Filter as “Full-Time Employee” in the default Subject Area Contents folder.
9. Click **OK**.

Check Your Work:

Figure 186: Full-Time Employee Filter Independent of a Report



Exercise 5.2: Add a saved filter to a report

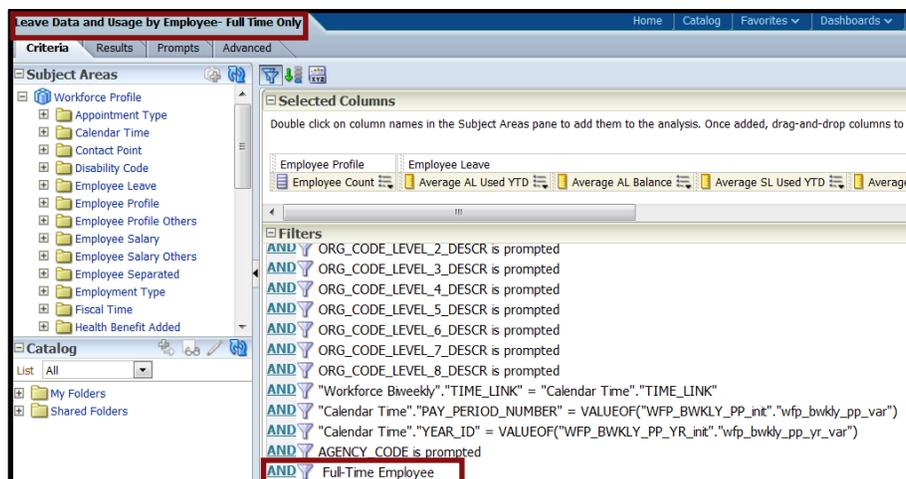
Situation: Carrie would like to add the existing Filter “Full-Time Employee” to the common report “Leave Data and Usage by Employee”.

Instructions: Follow the steps below to complete the exercise in *Insight*:

1. Click on the **Catalog** action link from the top navigation bar.
2. Expand the **Shared Folders** to navigate to the desired report by expanding the following folders: Shared Folders >> Common Report Library >> Compensation >> Leave >> Leave >> Leave Data and Usage by Employee.
3. Click the **Edit** action link corresponding to Leave Data and Usage by Employee.
4. From the **Criteria** tab of the *ad hoc report editing page*, locate the **Catalog** pane.
5. Navigate to the “Full-Time Employee” filter by opening the following folders: My Folders >> Subject Area Contents >> Workforce Profile.
6. Double-click on the **Full-Time Employee** filter.
7. Within the Apply Saved Filter window, click **OK**.
8. Click the **Save As** icon.
9. Within My Folders, save the report as “Leave Data and Usage by Employee – Full Time Only”.
10. Click **OK**.

Check Your Work:

Figure 187: Saved Filter within an Existing Report



Exercise 5.3: Create and apply a dashboard prompt

Scenario: Padma wants to include her “Employment Type by Pay Plan” report in a new dashboard that includes a prompt on Pay Period Number.

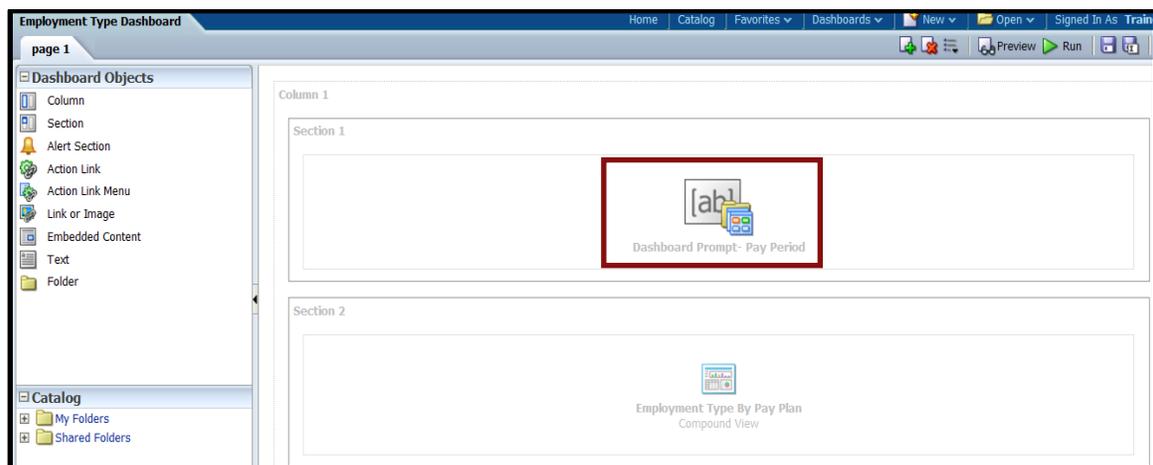
Instructions: Follow the steps below to complete the exercise in *Insight*:

1. Click on the **New** action link from the top navigation bar.
2. Select **Dashboard Prompt** from the menu of options.
3. Select the **Workforce Profile** Subject Area.
4. From the New Prompts page, click the **New** icon and select **Column Prompt**.
5. From the Select Column window, expand the Calendar Time folder, select the **PAY_PERIOD_NUMBER** data element, and click **OK**.
6. The New Prompt: PAY_PERIOD_NUMBER window appears, click **OK**.
7. Click the **Save As** icon. Save the Dashboard Prompt in My Folders as “Dashboard Prompt—Pay Period”, and click **OK**.
8. From the top navigation bar, click on the **Catalog** action link.
9. Within My Folders navigate to the previously saved “Employment Type by Pay Plan” report. Click the **Edit** action link.
10. Navigate to the **Criteria** tab.
11. From the **Filters** pane, click on the **Filters** icon. Select **More Columns**.
12. In the Select Column window, expand the Calendar Time folder and select **PAY_PERIOD_NUMBER** from the menu of options. Click **OK**.
13. From the New Filter window, select **Is Prompted** as the Operator and click **OK**.
14. Click on the **Save** icon from the report navigation bar.
15. From the top navigation bar, click the **New** action link and select **Dashboard**.
16. In the New Dashboard window, type “Employment Type Dashboard”.
17. From the location drop-down, select **Browse Catalog**.

18. In the Select Location window, select **My Folders** from the Folders pane. Click **OK**.
19. A warning alerting the user that “This dashboard will not appear in the “Dashboards” menu” will pop up. Click **OK**.
20. In the New Dashboard window, click **OK**.
21. From the **ad hoc dashboard editing** page, navigate to the **Catalog** pane, and expand **My Folders**.
22. Locate the recently saved dashboard prompt “Dashboard Prompt—Pay Period” and drag and drop it to the **Dashboard** workspace.
23. From the **Catalog** pane, locate the ad hoc report “Employment Type by Pay Plan” and drag and drop it into the **Dashboard** workspace.
24. Click the **Save** icon from the dashboard navigation bar.
25. Click the **Run** icon from the dashboard navigation bar.

Check Your Work:

Figure 188: Ad Hoc Dashboard with Pay Period Number Prompt



5.7. Chapter Review

Chapter Summary

Having completed this chapter, you should now be able to:

- Describe the purpose of filters and prompts
- Demonstrate how to create a new filter within a report
- Demonstrate how to apply a saved filter to an existing report
- Demonstrate how to create a report prompt
- Demonstrate how to create a dashboard prompt

Notes:

6.0. Create Tables and Pivot Tables

6.1. Chapter Overview

This chapter will review the value and utility of tables and pivot tables, and how users can create reports with tables and pivot tables in *Insight*.

Chapter Objectives

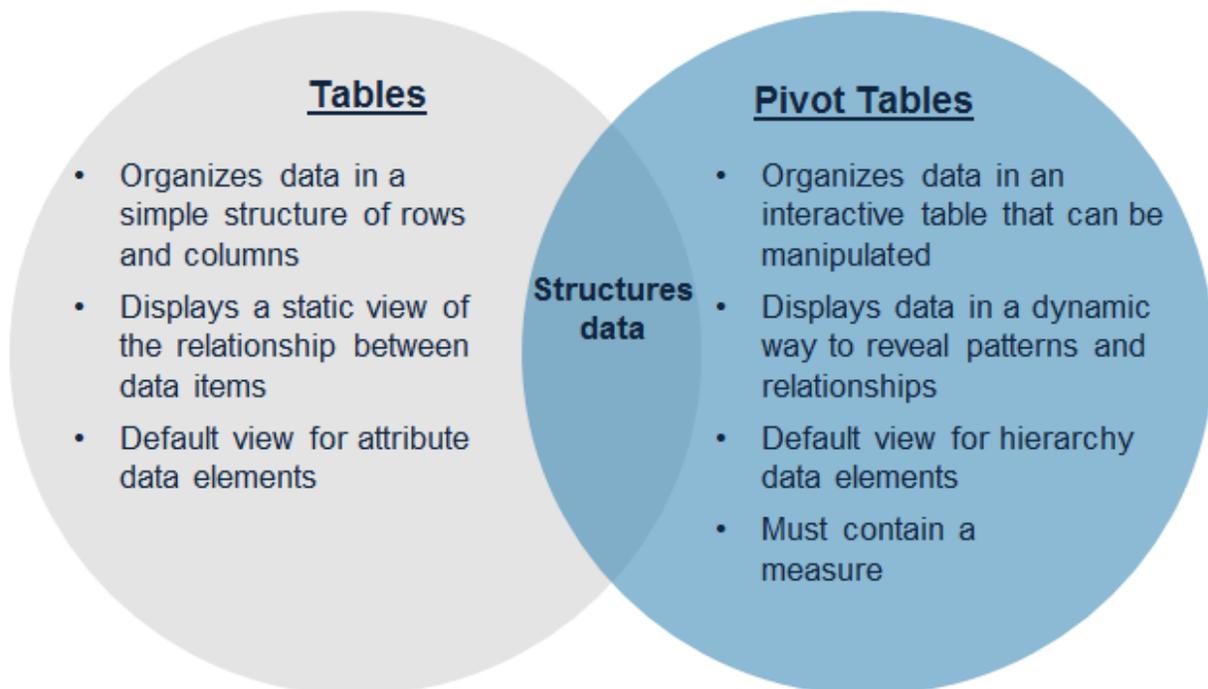
After completing this chapter, you will be able to:

- Describe the difference between default tables and pivot tables
- Demonstrate how to create a new table within a report
- Demonstrate how to create a pivot table within a report

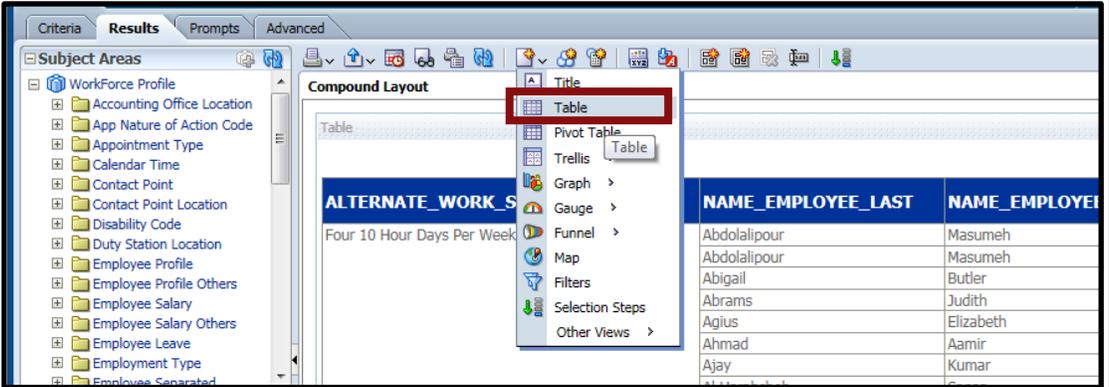
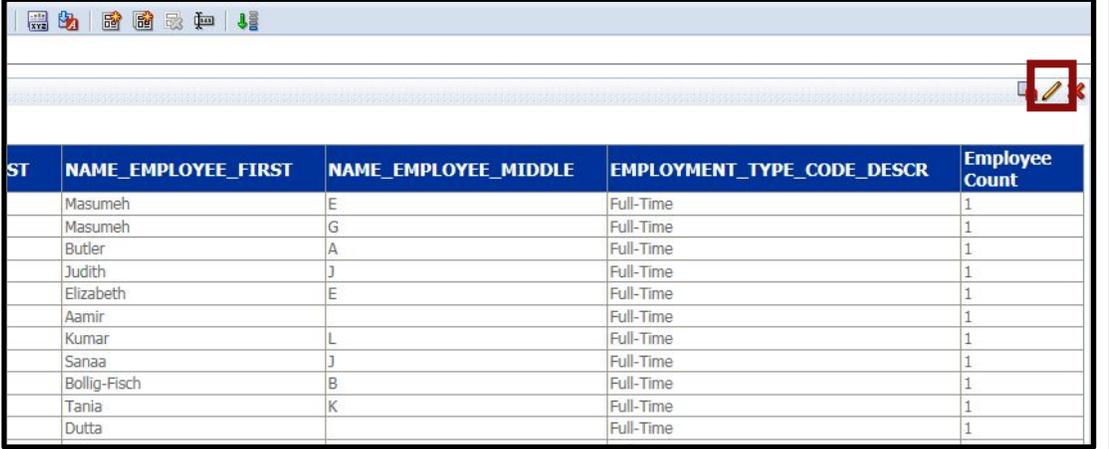
6.2. Compare Tables and Pivot Tables

Users have the ability to create tables and/or pivot tables within the *Insight* ad hoc environment. While most reports will default to a table, users can create pivot tables to more clearly highlight the key trends and relationships in the data.

Figure 189: Tables and Pivot Tables in Insight

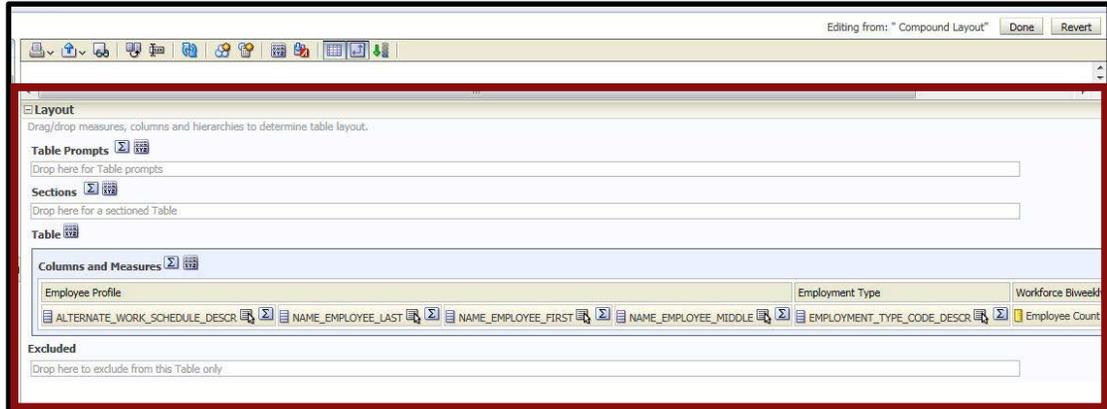


6.3. Create a Table within a Report

Step	Action																																																												
1.	<p>Click the New View icon and select Table from the Results tab of the ad hoc report editing page.</p> <p style="text-align: center;"><i>Figure 190: New View Drop-Down Menu with Table Highlighted</i></p> 																																																												
2.	<p>Click the Edit View icon to open the Layout pane.</p> <p style="text-align: center;"><i>Figure 191: Table Edit View Icon Highlighted</i></p>  <table border="1" data-bbox="334 1222 1425 1524"> <thead> <tr> <th>ST</th> <th>NAME_EMPLOYEE_FIRST</th> <th>NAME_EMPLOYEE_MIDDLE</th> <th>EMPLOYMENT_TYPE_CODE_DESCR</th> <th>Employee Count</th> </tr> </thead> <tbody> <tr><td></td><td>Masumeh</td><td>E</td><td>Full-Time</td><td>1</td></tr> <tr><td></td><td>Masumeh</td><td>G</td><td>Full-Time</td><td>1</td></tr> <tr><td></td><td>Butler</td><td>A</td><td>Full-Time</td><td>1</td></tr> <tr><td></td><td>Judith</td><td>J</td><td>Full-Time</td><td>1</td></tr> <tr><td></td><td>Elizabeth</td><td>E</td><td>Full-Time</td><td>1</td></tr> <tr><td></td><td>Aamir</td><td></td><td>Full-Time</td><td>1</td></tr> <tr><td></td><td>Kumar</td><td>L</td><td>Full-Time</td><td>1</td></tr> <tr><td></td><td>Sanaa</td><td>J</td><td>Full-Time</td><td>1</td></tr> <tr><td></td><td>Bollig-Fisch</td><td>B</td><td>Full-Time</td><td>1</td></tr> <tr><td></td><td>Tania</td><td>K</td><td>Full-Time</td><td>1</td></tr> <tr><td></td><td>Dutta</td><td></td><td>Full-Time</td><td>1</td></tr> </tbody> </table>	ST	NAME_EMPLOYEE_FIRST	NAME_EMPLOYEE_MIDDLE	EMPLOYMENT_TYPE_CODE_DESCR	Employee Count		Masumeh	E	Full-Time	1		Masumeh	G	Full-Time	1		Butler	A	Full-Time	1		Judith	J	Full-Time	1		Elizabeth	E	Full-Time	1		Aamir		Full-Time	1		Kumar	L	Full-Time	1		Sanaa	J	Full-Time	1		Bollig-Fisch	B	Full-Time	1		Tania	K	Full-Time	1		Dutta		Full-Time	1
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	Sanaa	J	Full-Time	1																																																									
	Bollig-Fisch	B	Full-Time	1																																																									
	Tania	K	Full-Time	1																																																									
	Dutta		Full-Time	1																																																									

- View the **Layout** pane to manipulate how the data elements are arranged within the table (i.e., within Table Prompts, Sections, etc.).

Figure 192: Table Layout Pane



IMPORTANT: This functionality is covered in detail within Section 3.4 Customize Report Structure.



QUICK TIP: Remove a default table within a report

Step

Action

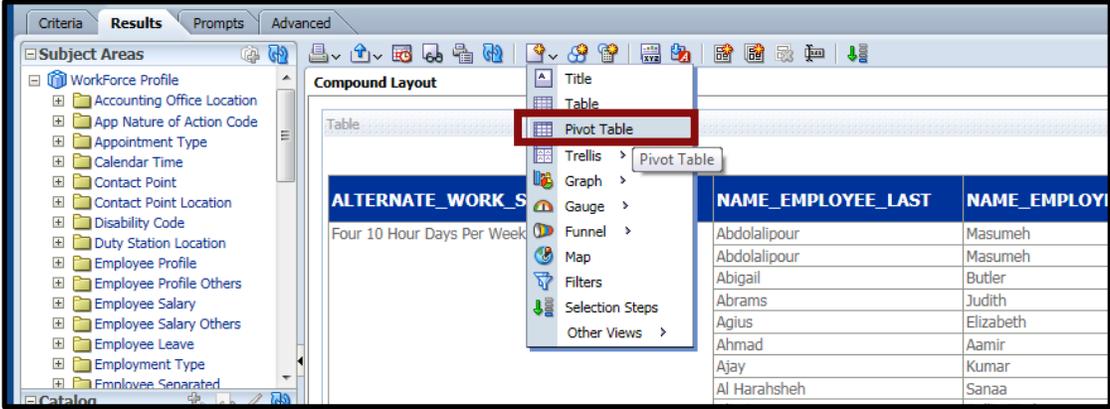
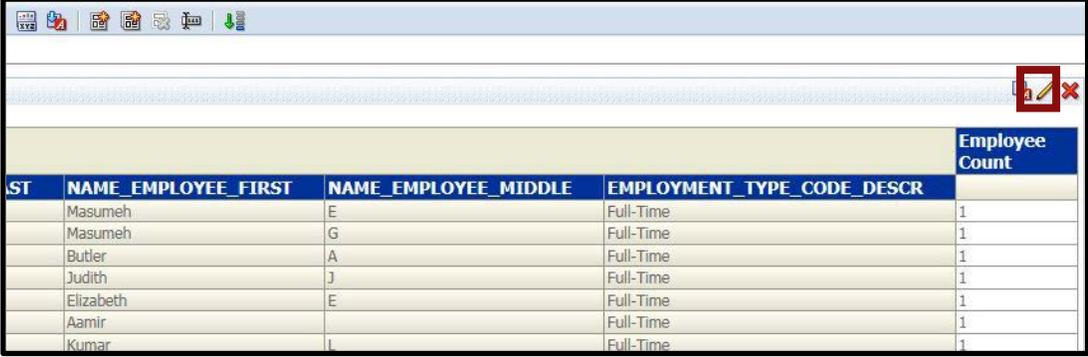
- Click the **Delete** icon to remove a default table from a report. When an ad hoc report is created *without* a hierarchy data element, it will include a table by default.

Figure 193: Table Delete Icon Highlighted



EMPLOYEE_FIRST	NAME_EMPLOYEE_MIDDLE	EMPLOYMENT_TYPE_CODE_DESCR	Employee Count
E		Full-Time	1
G		Full-Time	1
A		Full-Time	1
J		Full-Time	1
E		Full-Time	1
		Full-Time	1
		Full-Time	1

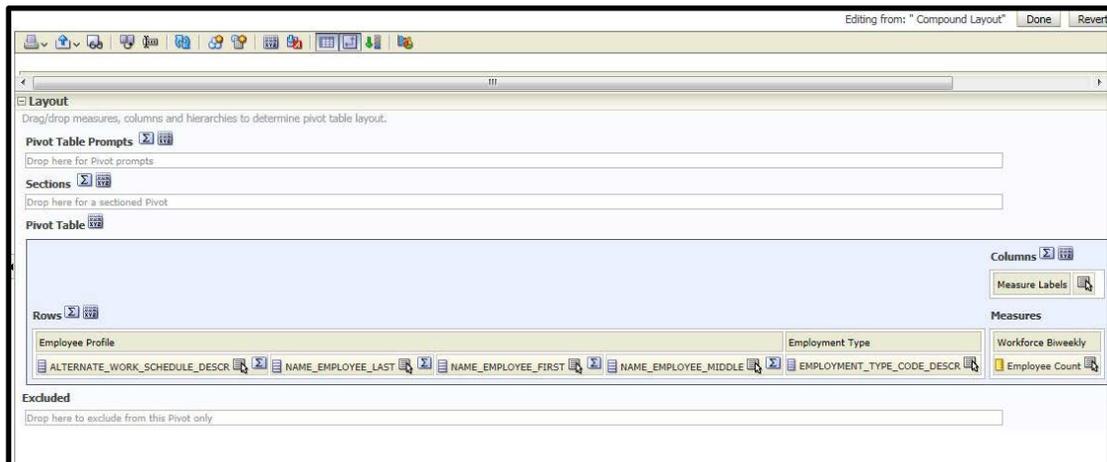
6.4. Create a Pivot Table within a Report

Step	Action																																								
1.	<p>Click the New View icon from the Results tab navigation bar and select Pivot Table.</p> <p><i>Figure 194: New View Icon Drop-Down Menu with Pivot Table Highlighted</i></p> 																																								
2.	<p>Click the Edit View icon for the pivot table report component.</p> <p><i>Figure 195: Pivot Table Edit View Icon Highlighted</i></p>  <table border="1" data-bbox="337 1167 1425 1398"> <thead> <tr> <th>ST</th> <th>NAME_EMPLOYEE_FIRST</th> <th>NAME_EMPLOYEE_MIDDLE</th> <th>EMPLOYMENT_TYPE_CODE_DESCR</th> <th>Employee Count</th> </tr> </thead> <tbody> <tr> <td></td> <td>Masumeh</td> <td>E</td> <td>Full-Time</td> <td>1</td> </tr> <tr> <td></td> <td>Masumeh</td> <td>G</td> <td>Full-Time</td> <td>1</td> </tr> <tr> <td></td> <td>Butler</td> <td>A</td> <td>Full-Time</td> <td>1</td> </tr> <tr> <td></td> <td>Judith</td> <td>J</td> <td>Full-Time</td> <td>1</td> </tr> <tr> <td></td> <td>Elizabeth</td> <td>E</td> <td>Full-Time</td> <td>1</td> </tr> <tr> <td></td> <td>Aamir</td> <td></td> <td>Full-Time</td> <td>1</td> </tr> <tr> <td></td> <td>Kumar</td> <td></td> <td>Full-Time</td> <td>1</td> </tr> </tbody> </table>	ST	NAME_EMPLOYEE_FIRST	NAME_EMPLOYEE_MIDDLE	EMPLOYMENT_TYPE_CODE_DESCR	Employee Count		Masumeh	E	Full-Time	1		Masumeh	G	Full-Time	1		Butler	A	Full-Time	1		Judith	J	Full-Time	1		Elizabeth	E	Full-Time	1		Aamir		Full-Time	1		Kumar		Full-Time	1
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	Elizabeth	E	Full-Time	1																																					
	Aamir		Full-Time	1																																					
	Kumar		Full-Time	1																																					

3. Drag data elements to the following sections within the **Layout** pane to edit the structure of the pivot table.

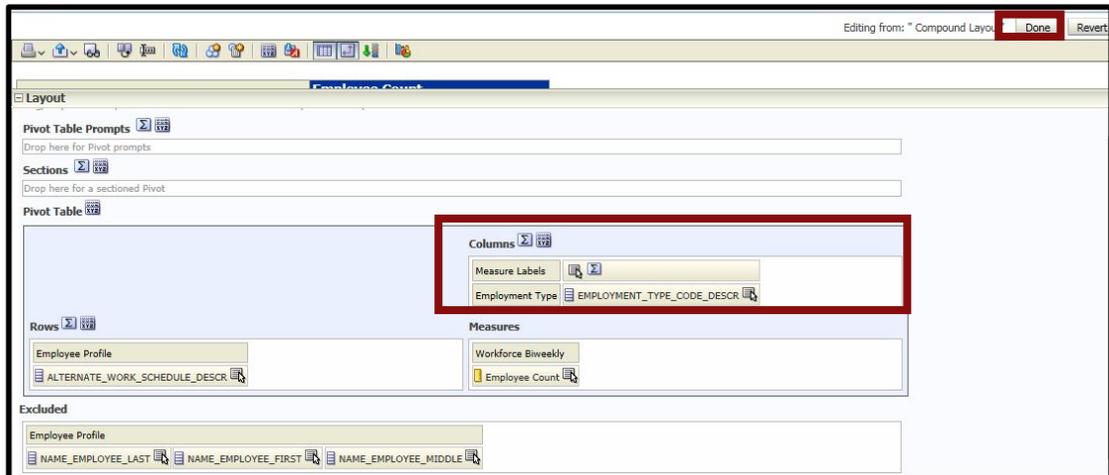
- **Pivot Table Prompts:** Allows users to actively manipulate how data is restricted in the pivot table.
- **Sections:** Breaks the pivot table into individual segments based on a specific data element.
- **Rows:** Lists data elements that will display as rows within the pivot table.
- **Columns:** Lists data elements that will be manipulated as part of the pivot table.
- **Measures:** Lists numerical data elements that will populate within the pivot table based on defined rows, columns, etc.
- **Excluded:** Excludes data elements from displaying in the pivot table.

Figure 196: Pivot Table Layout Pane



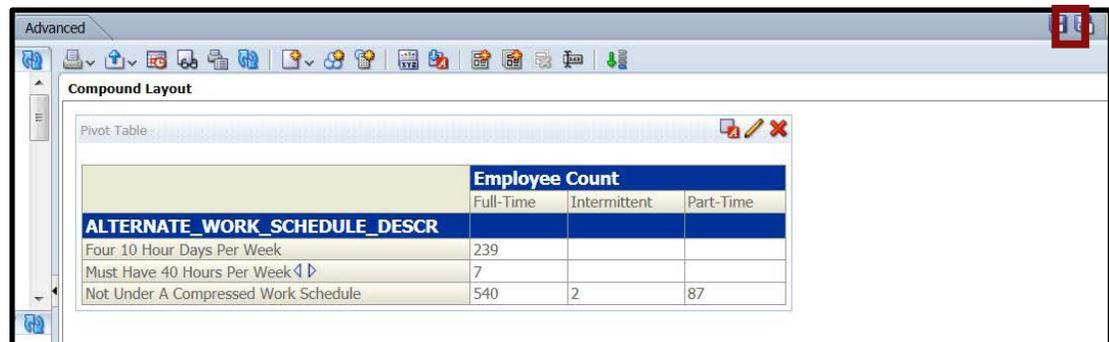
4. The report will pivot based on data elements in Columns, resulting in a division of the data elements in Rows. Click **Done**.

Figure 197: Pivot Table Layout Pane with Columns Highlighted



5. View the updates to the pivot table based on customizations made in the **Layout** pane. Click the **Save As** icon to save customizations made to the report.

Figure 198: Pivot Table in the Results Tab with Save As Icon Highlighted



6.5. Create Tables and Pivot Tables: Exercises

Exercise 6.1: Create a Pivot Table

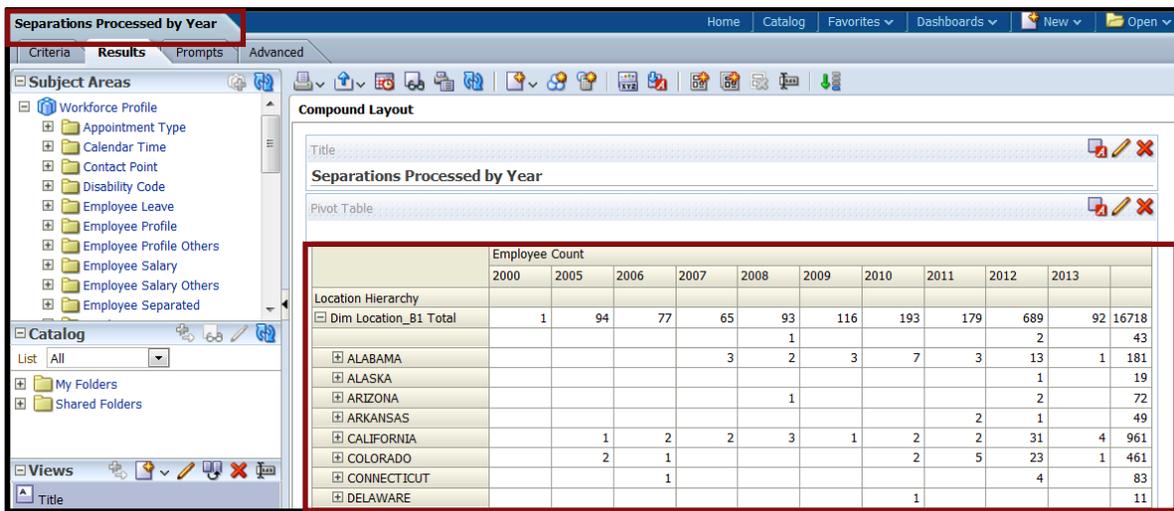
Scenario: Charlie needs to create an ad hoc report that represents the amount of separations processed over time by location. He decides to represent the information in a pivot table so he can identify trends over time.

Instructions: Follow the steps below to complete the exercise in *Insight*:

1. Click the **New** action link from the top navigation bar.
2. Select **Analysis** from the menu of options.
3. From the Select Subject Area window, select **Workforce Profile**.
4. From the **Criteria** tab, drag and drop the following data elements from the **Subject Areas** pane to the **Selected Columns** pane:
 - a. From the Location folder, select Location Hierarchy.
 - b. From the Employee Separated folder, select SEPARATION_PROCESSED_YEAR.
 - c. From the Workforce Biweekly folder, select Employee Count.
5. Navigate to the **Results** tab.
6. Click the **Edit View** icon corresponding to the pivot table.
7. Within the **Layout** pane, drag the SEPARATION_PROCESSED_YEAR column to the Columns section. Click **Done**.
8. Expand “All Locations” to view separations processed by year for each state.
9. Click the **Save As** icon. Save the report within My Folders as “Separations Processed by Year.”

Check Your Work:

Figure 199: Separations Processed by Time and Location Pivot Table



Location Hierarchy	Employee Count										
	2000	2005	2006	2007	2008	2009	2010	2011	2012	2013	
Dim Location_B1 Total	1	94	77	65	93	116	193	179	689	92	16718
ALABAMA				3	2	3	7	3	13	1	181
ALASKA									1		19
ARIZONA					1				2		72
ARKANSAS								2	1		49
CALIFORNIA		1	2	2	3	1	2	2	31	4	961
COLORADO		2	1				2	5	23	1	461
CONNECTICUT			1						4		83
DELAWARE							1				11

6.6. Chapter Review

Chapter Summary

Having completed this chapter, you should now be able to:

- Describe the difference between default tables and pivot tables
- Demonstrate how to create a new table within a report
- Demonstrate how to create a pivot table within a report

Notes:

7.0. Write Formulas in *Insight*

7.1. Chapter Overview

This chapter will review how *Insight* enables users to customize data in a report using mathematical logic.

Chapter Objectives

- Describe scenarios when a user would write formulas in *Insight*
- Demonstrate how to edit formulas in *Insight*

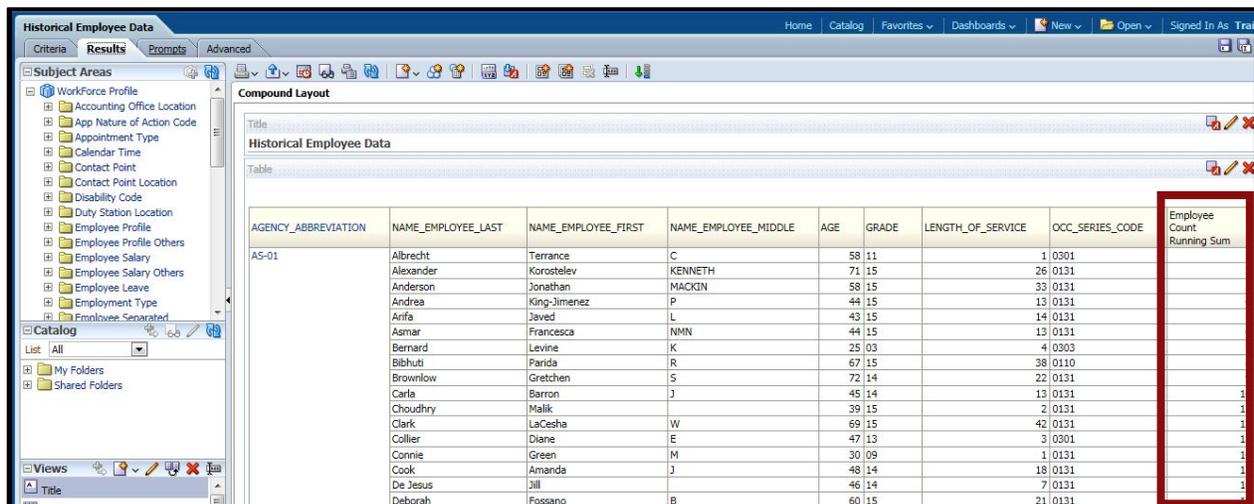
7.2. Use Formulas to Customize Data in a Report

When to Customize Data using a Formula

Users can customize data elements using mathematical logic through the Edit Column Formula feature. This feature is valuable for users to perform powerful calculations and manipulations to data, including:

- **Modify data elements:** Allows users to apply mathematical functions to customize data elements for agency-specific needs (e.g., average, running sum, etc.).

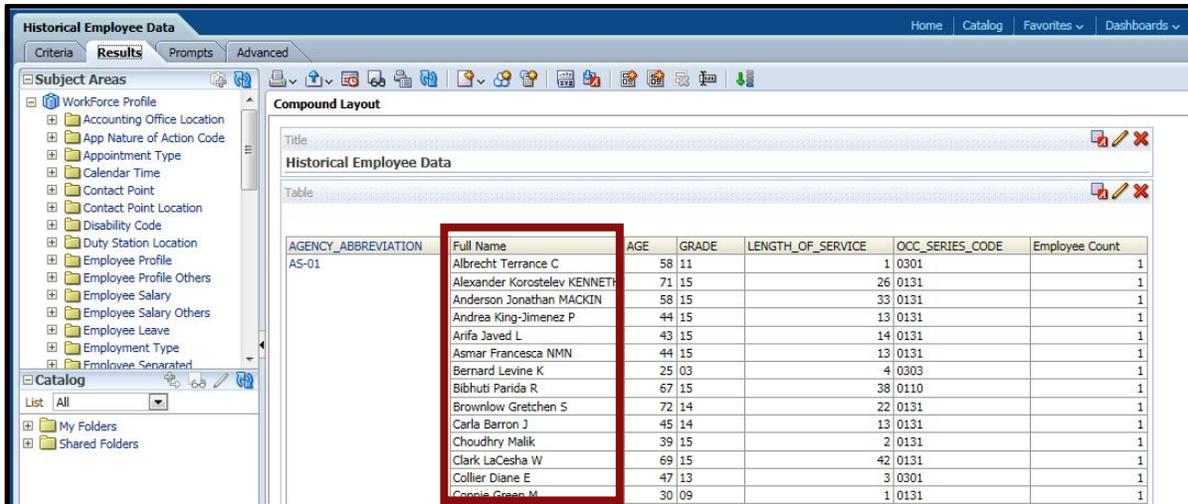
Figure 200: Modifying Data Elements



AGENCY_ABBREVIATION	NAME_EMPLOYEE_LAST	NAME_EMPLOYEE_FIRST	NAME_EMPLOYEE_MIDDLE	AGE	GRADE	LENGTH_OF_SERVICE	OCC_SERIES_CODE	Employee Count Running Sum
AS-01	Albrecht	Terrance	C	58	11	1	0301	
	Alexander	Korostelev	KENNETH	71	15	26	0131	
	Anderson	Jonathan	MACKIN	58	15	33	0131	
	Andrea	King-Jiménez	P	44	15	13	0131	
	Anifa	Javed	L	43	15	14	0131	
	Asmar	Francesca	NMN	44	15	13	0131	
	Bernard	Levine	K	25	03	4	0303	
	Bibhub	Panda	R	67	15	38	0110	
	Brownlow	Gretchen	S	72	14	22	0131	
	Carla	Barron	J	45	14	13	0131	1
	Choudhry	Malik		39	15	2	0131	1
	Clark	LaCesha	W	69	15	42	0131	1
	Collier	Diane	E	47	13	3	0301	1
	Connie	Green	M	30	09	1	0131	1
	Cook	Amanda	J	48	14	18	0131	1
	De Jesus	Jill		46	14	7	0131	1
	Deborah	Fossano	B	60	15	21	0131	1

- **Combine columns:** Allows users to combine or “concatenate” multiple data elements into a new column (e.g., John + Smith = John Smith).

Figure 201: Combining Columns

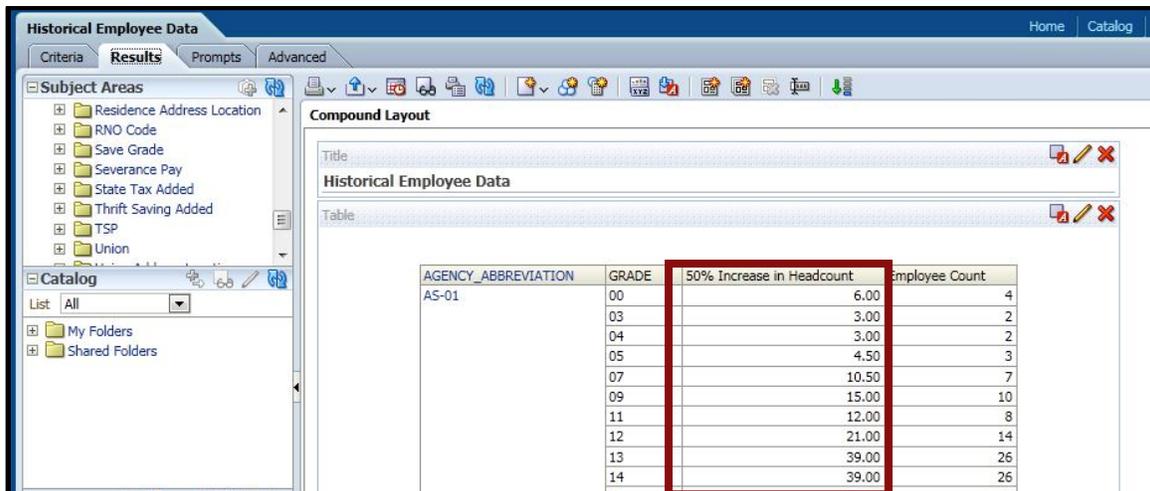


Historical Employee Data

AGENCY_ABBREVIATION	Full Name	AGE	GRADE	LENGTH_OF_SERVICE	OCC_SERIES_CODE	Employee Count
AS-01	Albrecht Terrance C	58	11	1	0301	1
	Alexander Korostelev KENNETH	71	15	26	0131	1
	Anderson Jonathan MACKIN	58	15	33	0131	1
	Andrea King-Jimenez P	44	15	13	0131	1
	Arifa Javed L	43	15	14	0131	1
	Asmar Francesca NMN	44	15	13	0131	1
	Bernard Levine K	25	03	4	0303	1
	Bibhuti Parida R	67	15	38	0110	1
	Brownlow Gretchen S	72	14	22	0131	1
	Carla Barron J	45	14	13	0131	1
	Choudhry Malik	39	15	2	0131	1
	Clark LaCesha W	69	15	42	0131	1
	Collier Diane E	47	13	3	0301	1
	Coppola George M	30	09	1	0131	1

- **Scenario planning:** Allows users to view how data changes based on a given scenario (e.g., 50% increase in headcount across regions).

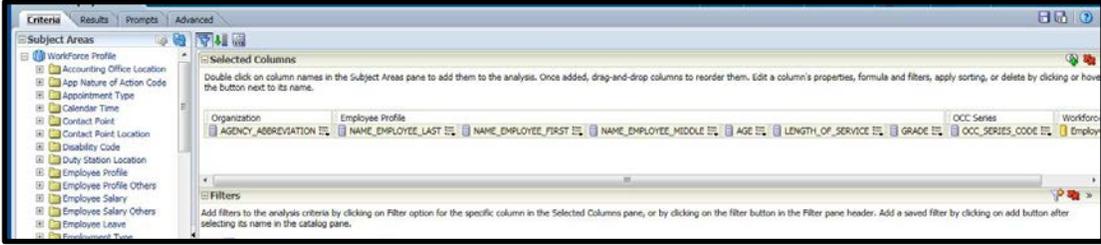
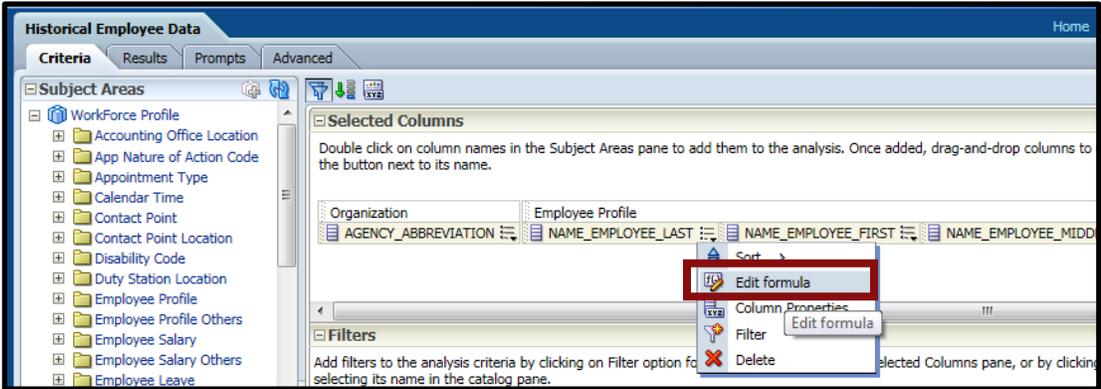
Figure 202: Scenario Planning



Historical Employee Data

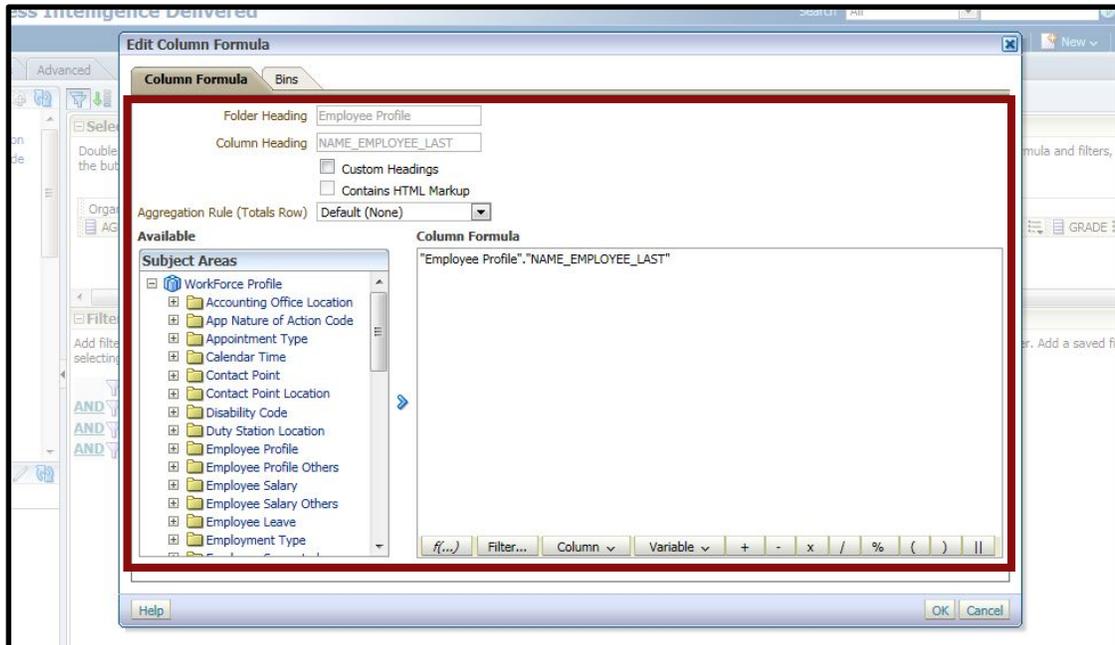
AGENCY_ABBREVIATION	GRADE	50% Increase in Headcount	Employee Count
AS-01	00	6.00	4
	03	3.00	2
	04	3.00	2
	05	4.50	3
	07	10.50	7
	09	15.00	10
	11	12.00	8
	12	21.00	14
	13	39.00	26
	14	39.00	26

Use Formulas to Modify Data

Step	Action
1.	<p>Navigate to the Selected Columns pane within the Criteria tab of the ad hoc report editing page.</p> <p style="text-align: center;"><i>Figure 203: Report Criteria Tab</i></p> 
2.	<p>Click the Edit icon for the desired data element and select Edit Formula.</p> <p style="text-align: center;"><i>Figure 204: Data Element Edit Icon Drop-Down Menu with Edit Formula Highlighted</i></p> 

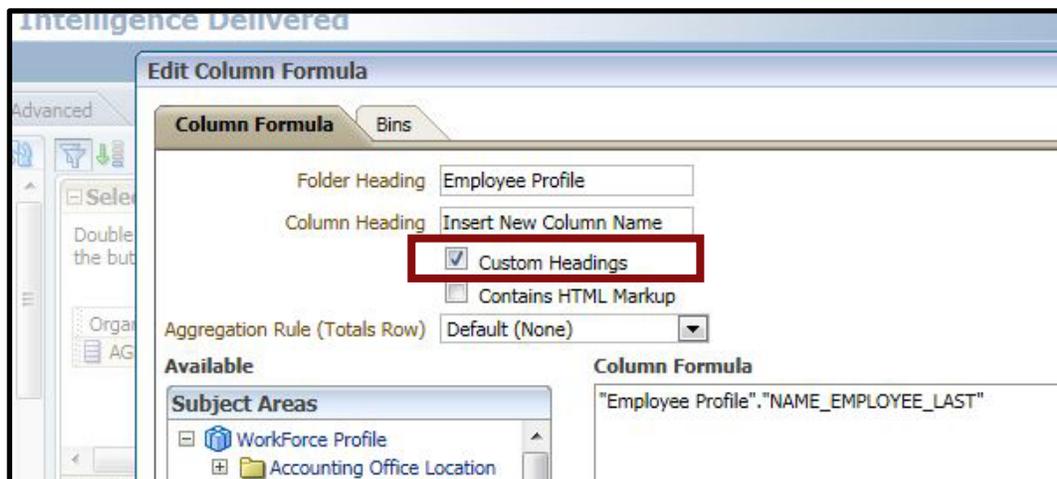
- View the Edit Column Formula window to customize the Column Heading and apply formulas to the values within the column.

Figure 205: Edit Column Formula Window

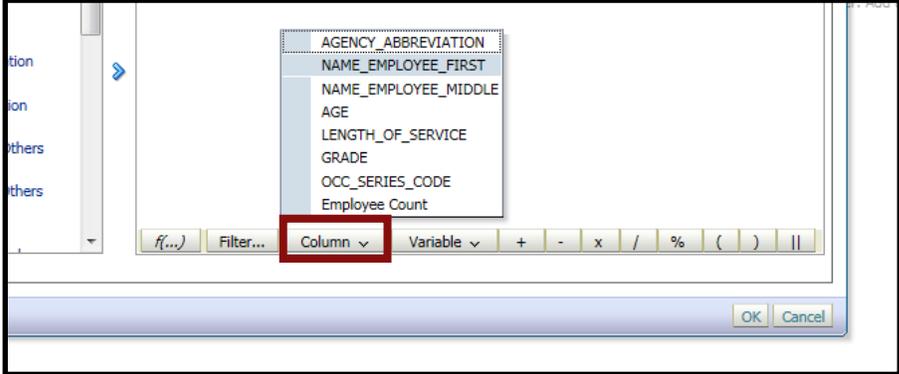
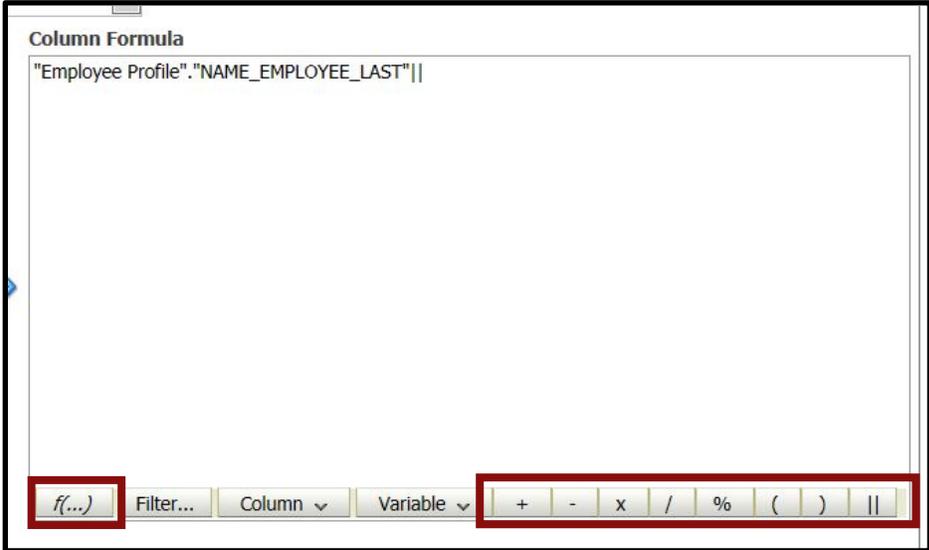
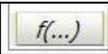


- Click the **Custom Headings** check box to edit the Folder Heading and Column Heading.

Figure 206: Edit Column Formula Window with Custom Headings Checkbox Highlighted

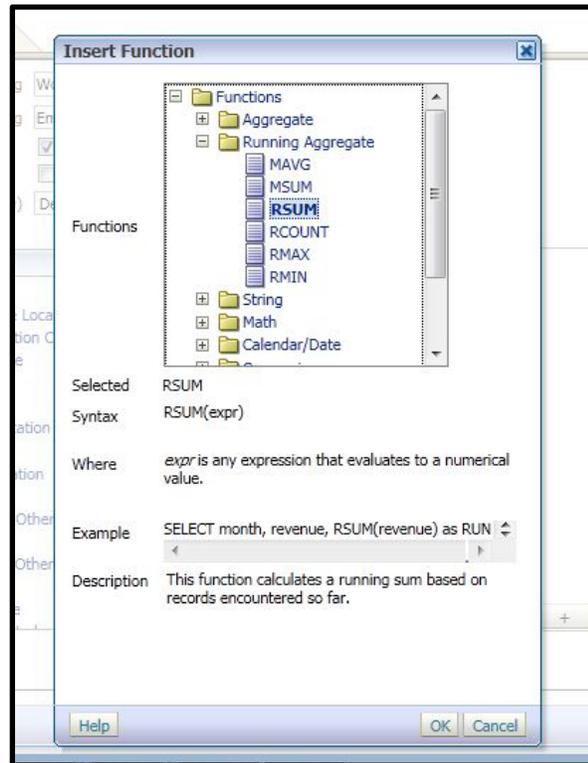


TIP: The customized Column Heading appears within the report when it is run.

5.	<p>Leave the Aggregation Rule at default, as this impacts the calculation users can apply to the table from the Layout pane.</p>
6.	<p>Click Column to choose from a menu of data elements in the pane to use in the formula.</p> <p style="text-align: center;"><i>Figure 207: Edit Column Formula Column Drop-Down Menu</i></p>  <p style="text-align: center;">  Column: Allows the user to choose the data element(s) to use in the formula. </p>
7.	<p>The mathematical operations available to users appear below the Column Formula workspace. To use the mathematical operations, click the corresponding icon or click Function for a menu of mathematical functions.</p> <p style="text-align: center;"><i>Figure 208: Edit Column Formula Function Icon and Mathematical Operations Icons</i></p>  <p style="text-align: center;">  Function: Contains a menu of functions to modify a data element. </p>

8. Navigate the Function folders to the desired function. An example of how to use the function and a description of the function is available for reference. Click the desired function and click **OK**.

Figure 209: Insert Function Window



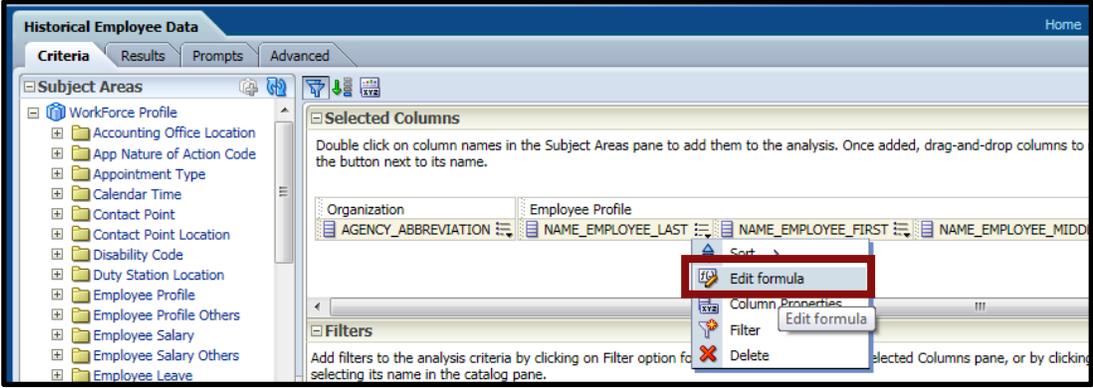
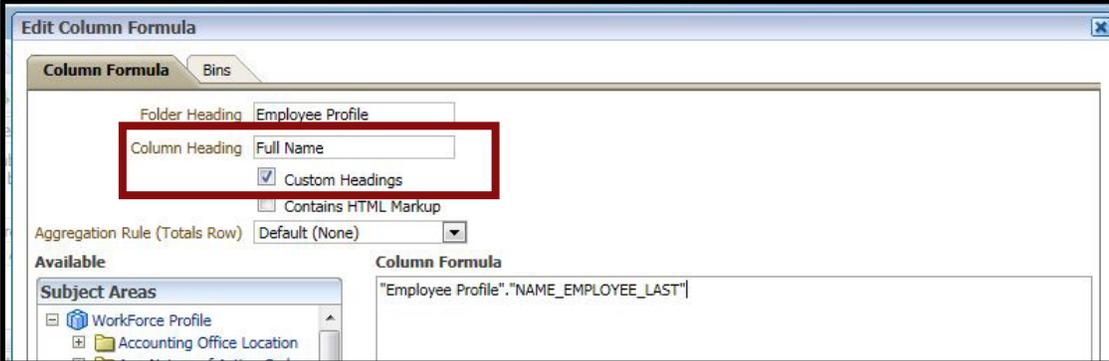
IMPORTANT: Each time a user adds a data element or mathematical operation, the formula will be highlighted in the Column Formula workspace.



TIP: Before adding another data element or mathematical operation, click the cursor where the new item will be added to avoid overwriting the existing formula.

Notes:

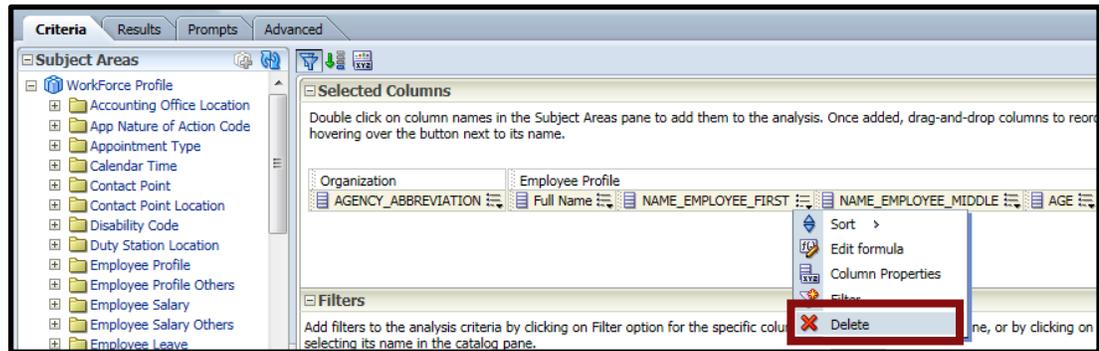
Concatenate Data Elements

Step	Action
1.	<p>Click the Edit icon for the targeted data element from the Selected Columns pane of the Criteria tab, and select Edit Formula.</p> <p><i>Figure 210: Data Element Drop-Down Menu with Edit Column Formula Highlighted</i></p> 
	<p>IMPORTANT: Users can only concatenate attribute data elements, not measures or hierarchies.</p>
2.	<p>Customize the Column Heading with a title that indicates the result of the concatenated data elements from the Edit Column Formula window.</p> <p><i>Figure 211: Edit Column Formula Custom Headings Highlighted</i></p> 

<p>3.</p>	<p>Click the Concatenate icon from the menu of mathematical operations below the Column Formula workspace.</p> <p style="text-align: center;"><i>Figure 212: Column Formula Workspace</i></p> <div data-bbox="375 380 1390 945" data-label="Image"> </div> <div data-bbox="363 978 415 1029" data-label="Image"> </div> <p>Concatenate: Joins multiple data elements so the values of each data element are merged in a single cell.</p>
<p>4.</p>	<p>Use the Subject Areas pane and Column Formula workspace to build the equation to mimic the following: Data Element 1 ' Data Element 2.</p> <p style="text-align: center;"><i>Figure 213: Column Formula Workspace with Concatenation Formula Highlighted</i></p> <div data-bbox="332 1247 1448 1652" data-label="Image"> </div>
<div data-bbox="207 1688 305 1780" data-label="Image"> </div>	<p>TIP: Users can replace the space in Data Element 1 ' Data Element 2 with a number of options including a dash (i.e., '-'), comma (i.e., ','), etc.</p>
<p>5.</p>	<p>Click OK.</p>

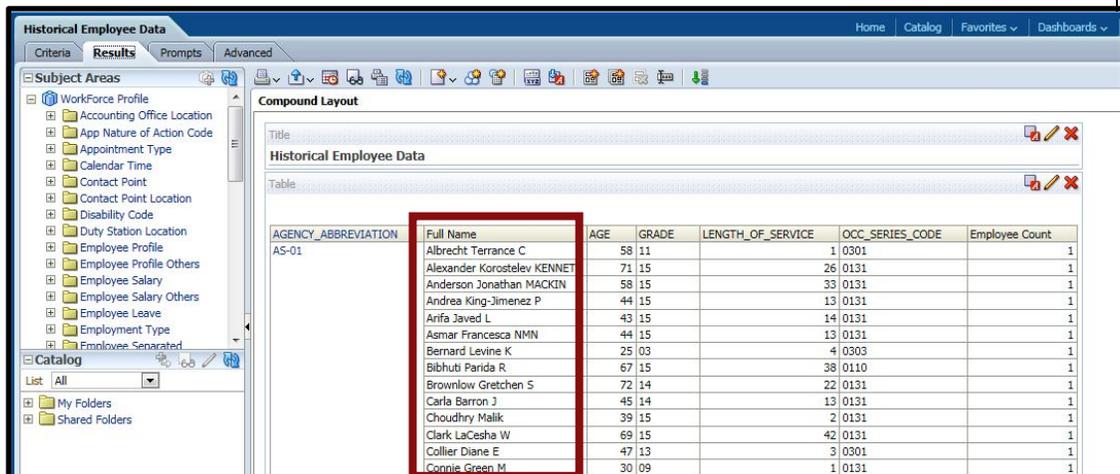
6. Click the **Edit** icon for the targeted data element and select **Delete** from the menu of options to delete the additional data element(s) concatenated while using the **Edit Column Formula** workspace.

Figure 214: Data Element Edit Icon Drop-Down Menu with Delete Highlighted

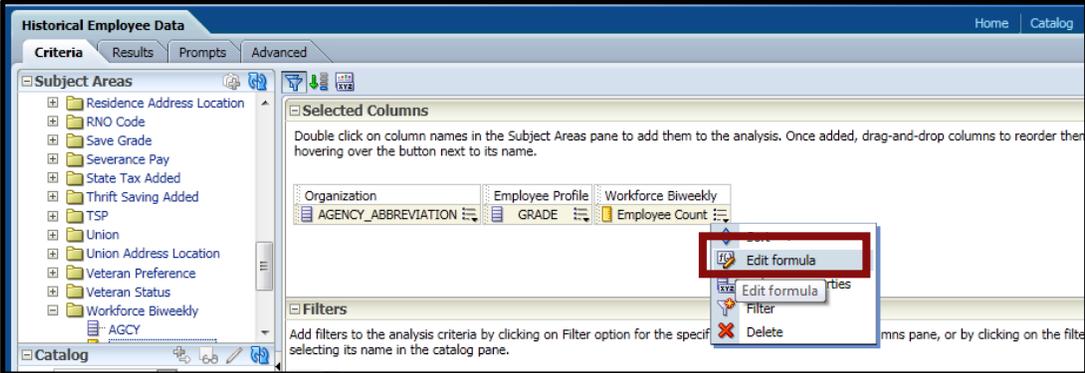
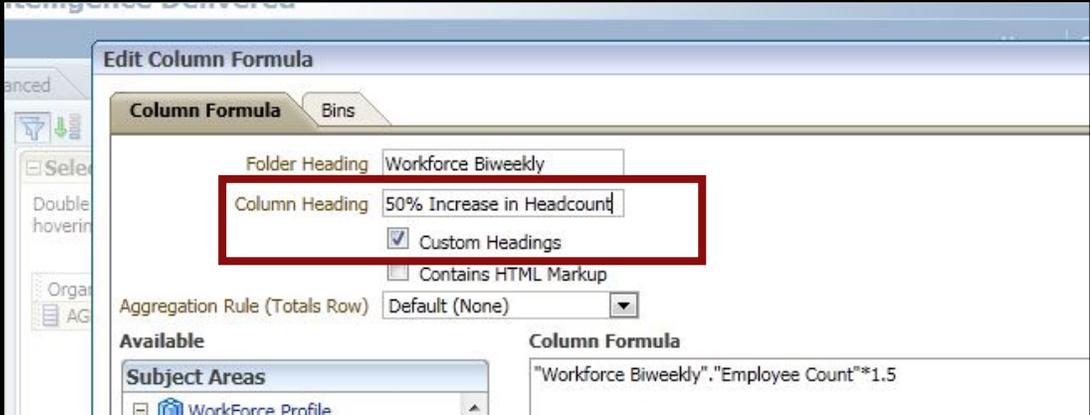


7. Navigate to the **Results** tab to view the result of the concatenated items.

Figure 215: Results Tab with Concatenated Data Element Highlighted

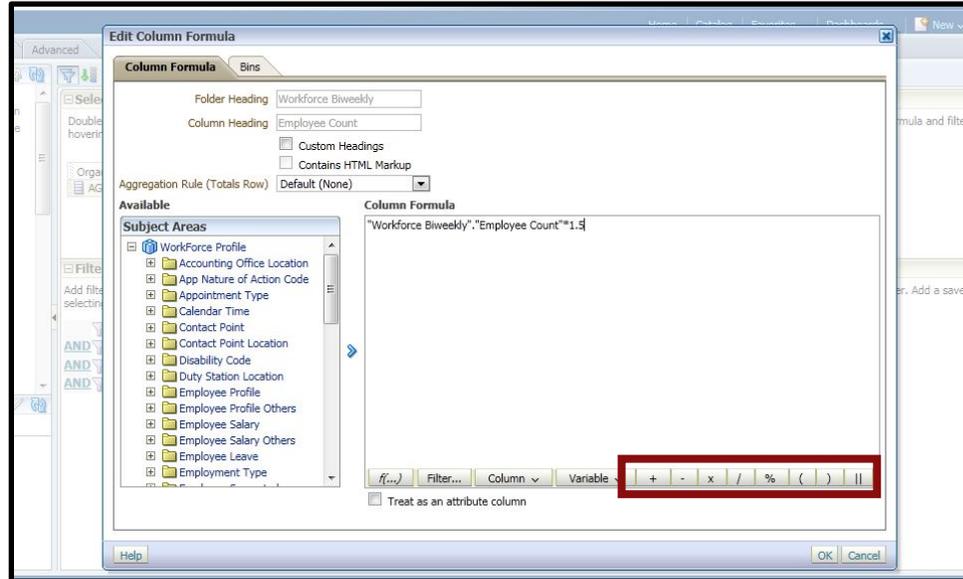


Apply Formulas for Scenario Planning

Step	Action
1.	<p>Click the Edit icon for the targeted data element and select Edit Formula from the Selected Columns pane of the Criteria tab.</p> <p><i>Figure 216: Data Element Edit Icon Drop-Down with Edit Formula Highlighted</i></p> 
	<p>TIP: Users can only apply formulas for scenario planning to measure data elements, not attributes or hierarchies.</p>
2.	<p>Customize the Column Heading with a title that indicates the result of the scenario illustrated.</p> <p><i>Figure 217: Edit Column Formula Window with Custom Heading Section Highlighted</i></p> 

3. Select the operation that will produce the desired scenario from the menu of mathematical operations below the **Column Formula** workspace.

Figure 218: Edit Column Formula Window with Mathematical Icons Highlighted



Multiply: Increases the value by a defined increment (E.g., to increase by 50% use *1.5).



Divide: Decreases the value by a defined increment (E.g., to decrease by 50% use *.5).



Plus: Increases the value by a defined amount (E.g., to increase by 50, use +50).

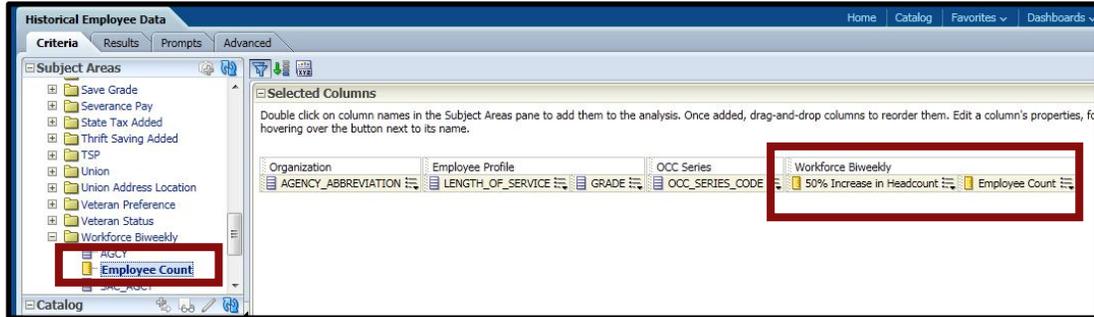


Minus: Decreases the value by a defined amount (E.g., to decrease by 50, use -50).

4. Click **OK**.

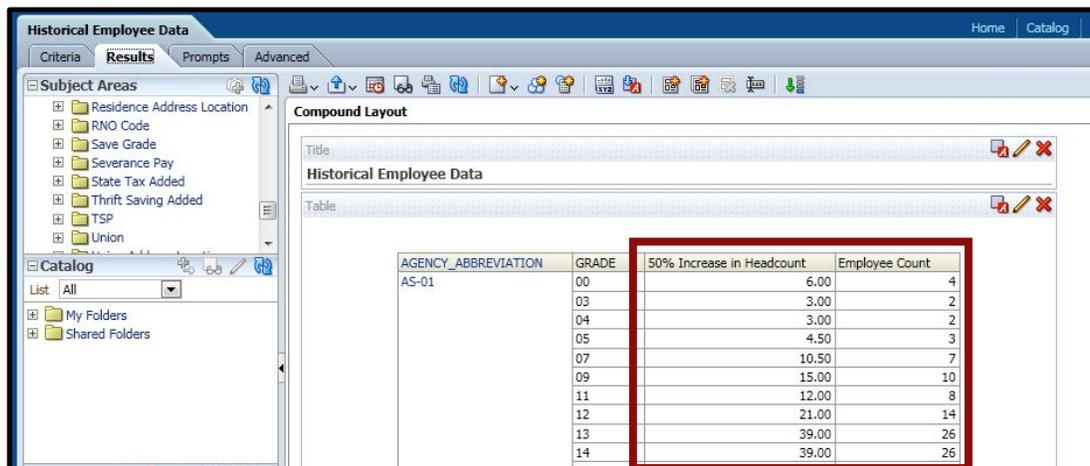
5. Add another instance of the customized data element to the **Selected Columns** pane from the **Subject Areas** pane. This will allow the user to compare the current state of data with the resulting scenario created using formulas.

Figure 219: Criteria Tab with Modified Data Elements Highlighted



6. Navigate to the **Results** tab to view the result of the report.

Figure 220: Criteria Tab with Modified Data Elements Highlighted



AGENCY_ABBREVIATION	GRADE	50% Increase in Headcount	Employee Count
AS-01	00	6.00	4
	03	3.00	2
	04	3.00	2
	05	4.50	3
	07	10.50	7
	09	15.00	10
	11	12.00	8
	12	21.00	14
	13	39.00	26
	14	39.00	26

7.3. Write Formulas in *Insight*: Exercises

Exercise: 7.1 Write a Formula

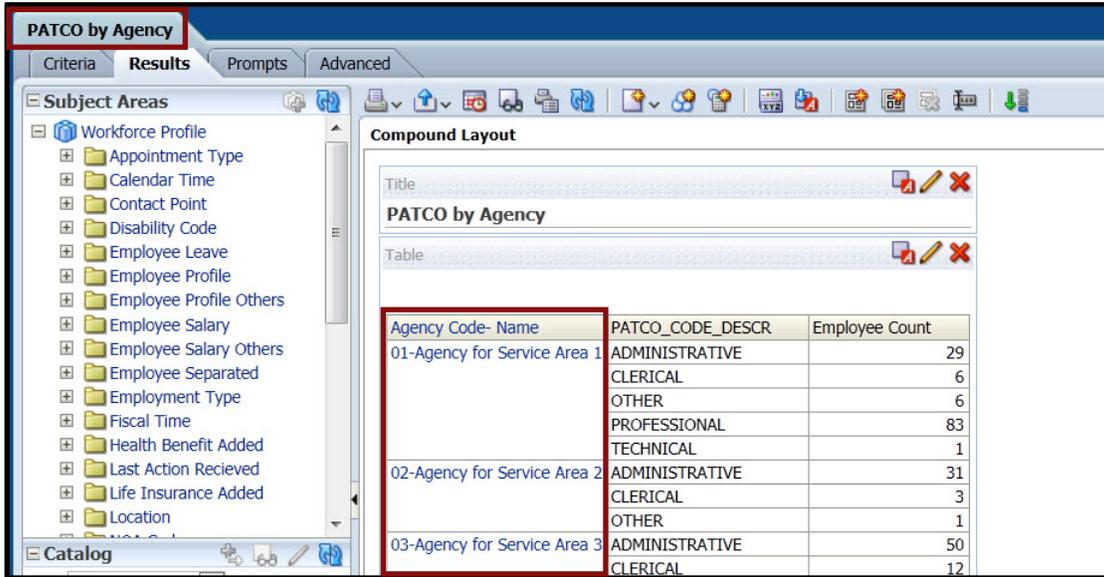
Instructions: Follow the steps below to complete the exercise in *Insight*:

1. Click on the **New** action link from the top navigation bar.
2. Select **Analysis** from the menu of options.
3. From the Select Subject Area window, select **Workforce Profile**.
4. From the **Subject Areas** pane of the **Criteria** tab, double-click the data elements outlined below to add them to the **Selected Columns** pane.
 - a. From the Organization folder, select AGENCY_CODE.
 - b. From the Organization folder, select AGENCY_NAME.
 - c. From the PATCO folder, select PATCO_CODE_DESCR.
 - d. From the Workforce Biweekly folder, select Employee Count
5. Within the **Selected Columns** pane, find the AGENCY_CODE data element and click the **Edit** icon.
6. From the menu of options, select **Edit Formula**.
7. Click the **Custom Headings** check box and update Column Heading as “Agency Code- Name”.
8. Within the **Column Formula** workspace, click the cursor after "Organization"."AGENCY_CODE".
9. Click the **Concatenate** icon. Within the **Column Formula** workspace, click the cursor after the concatenate symbol.
10. At the end of the formula in the **Column Formula** workspace type the following: ‘-’ (apostrophe, dash, apostrophe).
11. Click the **Concatenate** icon. Click the cursor after the concatenate symbol.
12. Click the **Column** icon and select AGENCY_NAME. Click **OK**.
13. Within the **Selected Columns** pane, locate the AGENCY_NAME data element. Click the corresponding **Edit** icon and select **Delete**.
14. Navigate to the **Results** tab to validate the results of the Agency Code and Abbreviation column.
15. Click the **Save As** icon from the Results tab navigation bar.

16. Save the report to My Folders as “PATCO by Agency”.
17. Click **OK**.

Check Your Work:

Figure 221: Agency Code-Name Concatenated Data Element in PATCO by Agency Report



Agency Code- Name	PATCO_CODE_DESCR	Employee Count
01-Agency for Service Area 1	ADMINISTRATIVE	29
	CLERICAL	6
	OTHER	6
	PROFESSIONAL	83
	TECHNICAL	1
02-Agency for Service Area 2	ADMINISTRATIVE	31
	CLERICAL	3
	OTHER	1
03-Agency for Service Area 3	ADMINISTRATIVE	50
	CLERICAL	12

7.4. Chapter Review

Chapter Summary

Having completed this chapter, you should now be able to:

- Describe scenarios where a user would write formulas within *Insight*
- Demonstrate how to edit formulas within *Insight*

Notes:

8.0. Create Calculated Items

8.1. Chapter Overview

This chapter will review how to create calculated items in order to group a defined value set within a report.

Chapter Objectives

After completing this chapter, you will be able to:

- Demonstrate how to create a new calculated item
- Demonstrate how to use a saved calculated item in a new or existing report

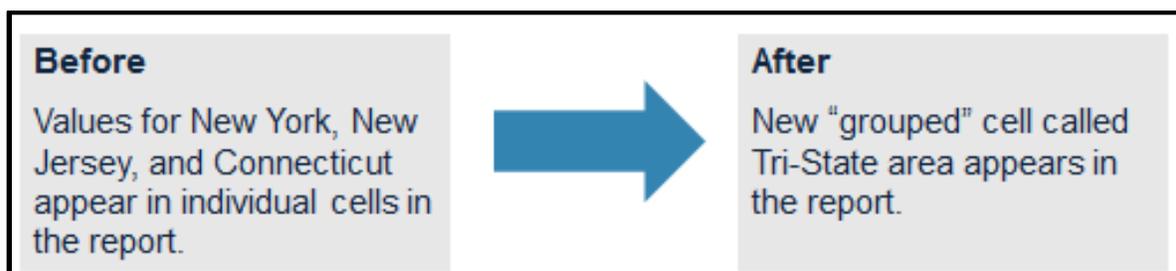
8.2. Create a New Calculated Item

When to Create a New Calculated Item

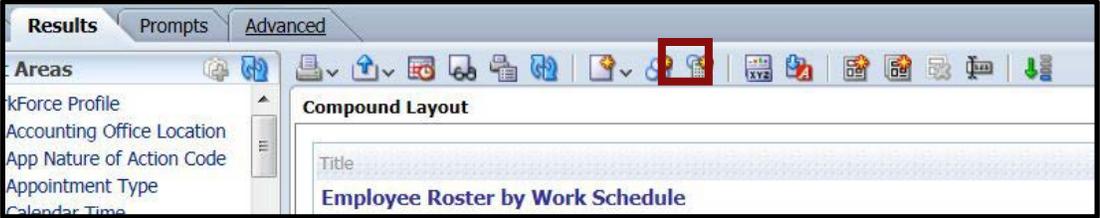
Users can customize the values within a data element by creating new defined groups of values - a new calculated item. The calculated item appears within a report (table, graph, etc.) in place of the original individual values and once created, the calculated item can be applied to multiple reports within that Subject Area.

For example, an organization has a high concentration of employees in New York, New Jersey, and Connecticut and refers to this as the “Tri-State Area”.

Figure 222: Calculated Item Example



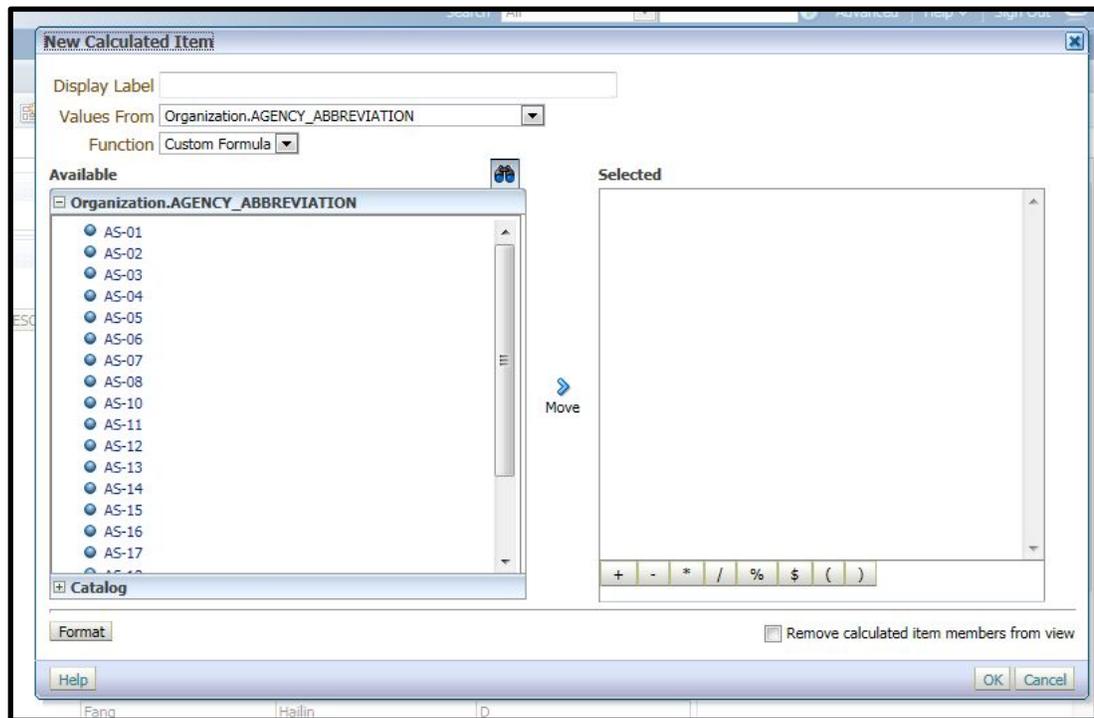
Combine Values as a New Calculated Item

Step	Action
1.	<p>Click the New Calculated Item icon from the Results tab of the ad hoc report editing page.</p> <p><i>Figure 223: Report Navigation Bar with New Calculated Items Icon Highlighted</i></p>  <p> New Calculated Item: Groups values of a data element into a defined set.</p>

2. View the New Calculated Item window to create a defined group of values based on a menu of data elements included in the report.

- **Display Label:** Allows users to customize the name for the grouped values.
- **Values From:** Lists the available data elements the user can choose from for the calculated item.
- **Function:** Provides a list of mathematical operations (e.g., sum, min, max, average, first, last, count, count distinct, etc.) available for the calculation.
- **Available:** Lists the values within the data element.
- **Format:** Allows the user to customize the styles/format of the calculated item to distinguish it from other values (e.g., font and color, cell background and border color).

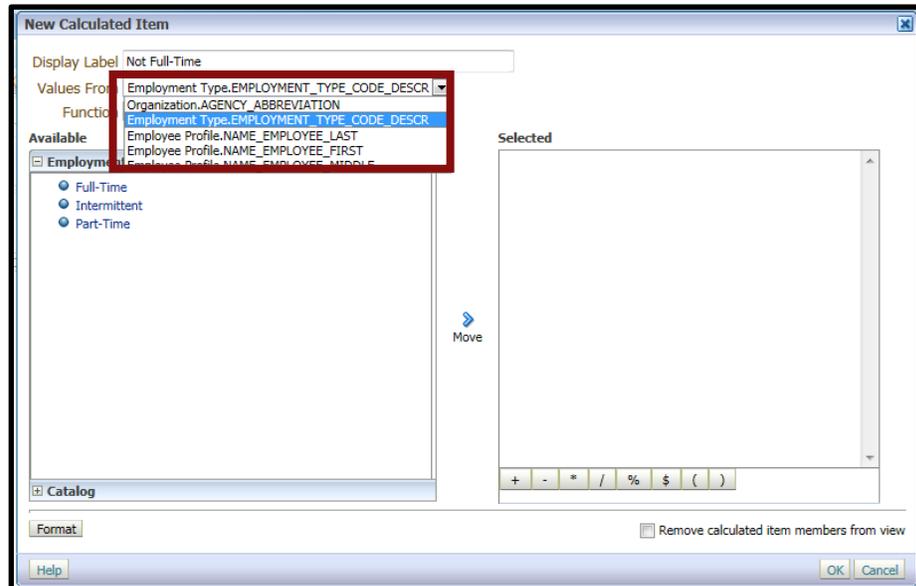
Figure 224: New Calculated Item Window



3. Assign a name for the grouped values in the Display Label text box.

4. Use the Values From drop-down menu to select the data element targeted for the calculated item.

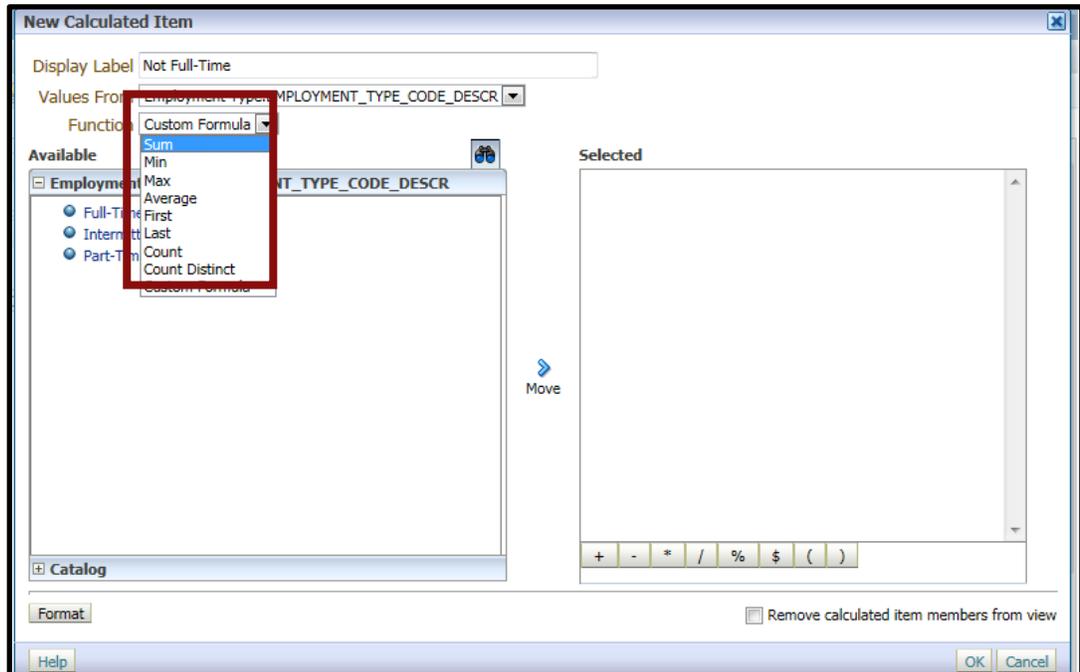
Figure 225: New Calculated Item Window with Value From Drop-Down Menu Highlighted



IMPORTANT: Users cannot create new calculated items with measure data elements.

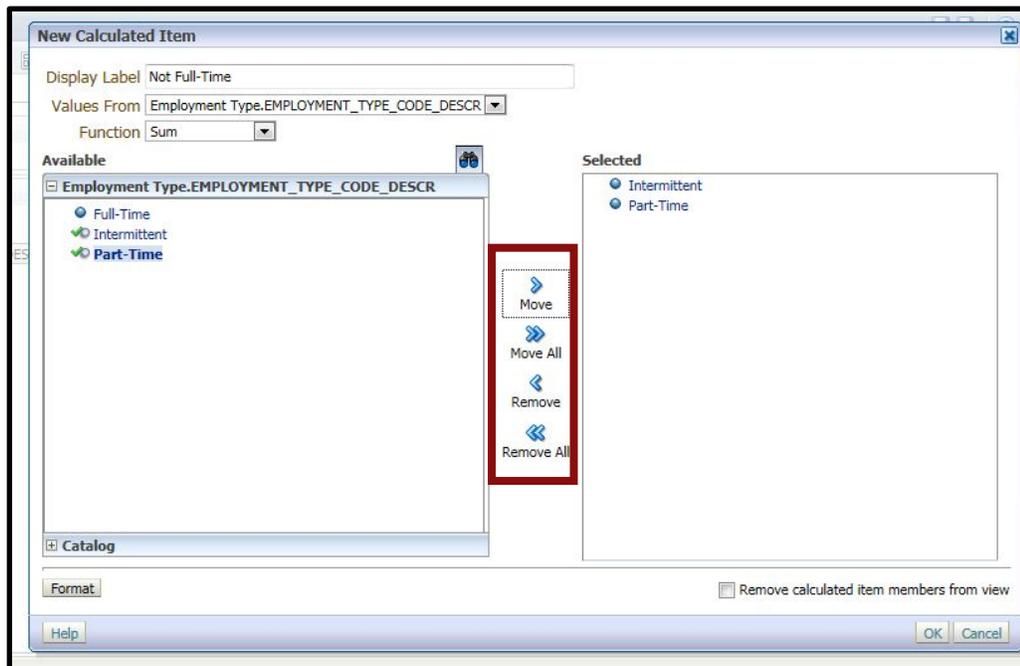
5. Select **Sum** from the Function drop-down menu.

Figure 226: New Calculated Item Window with Function Drop-Down Menu Highlighted



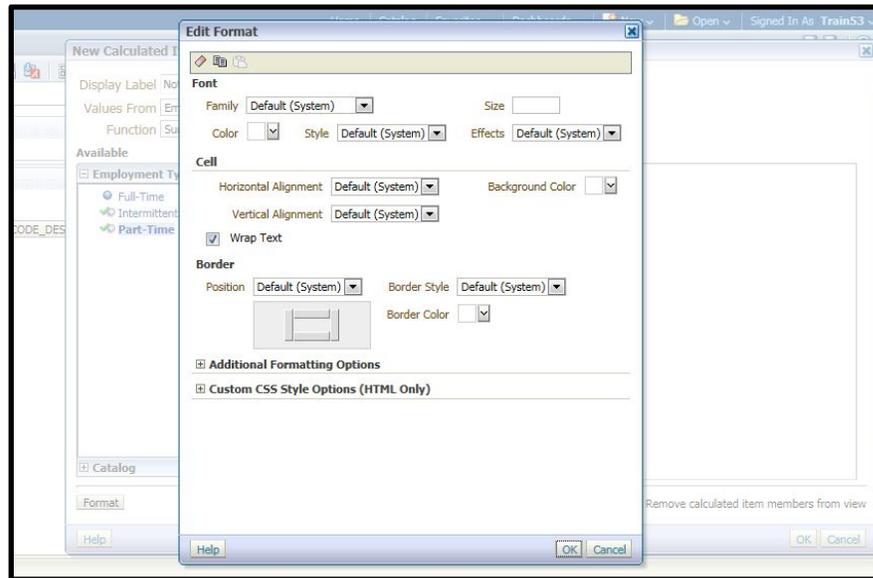
6. Use the blue arrows to move the targeted values from Available to Selected.

Figure 227: New Calculated Item Window with Move Arrows Highlighted



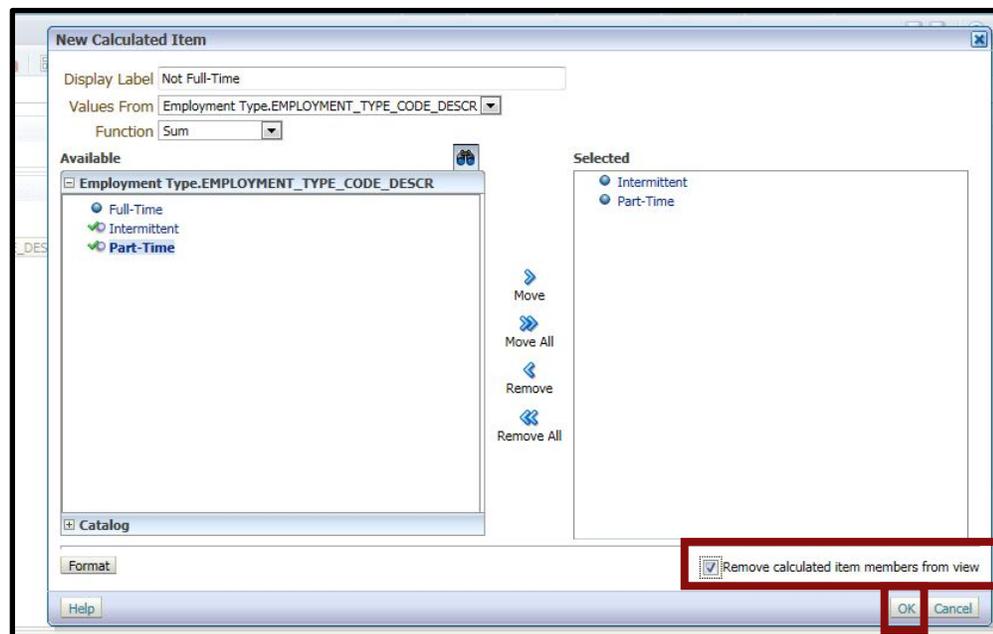
- Click the **Format** icon to view the Edit Format window and customize the styles and format of the calculated item to distinguish it from other values (e.g., font and color, cell background and border color). Click **OK**.

Figure 228: Calculated Item Edit Format Window

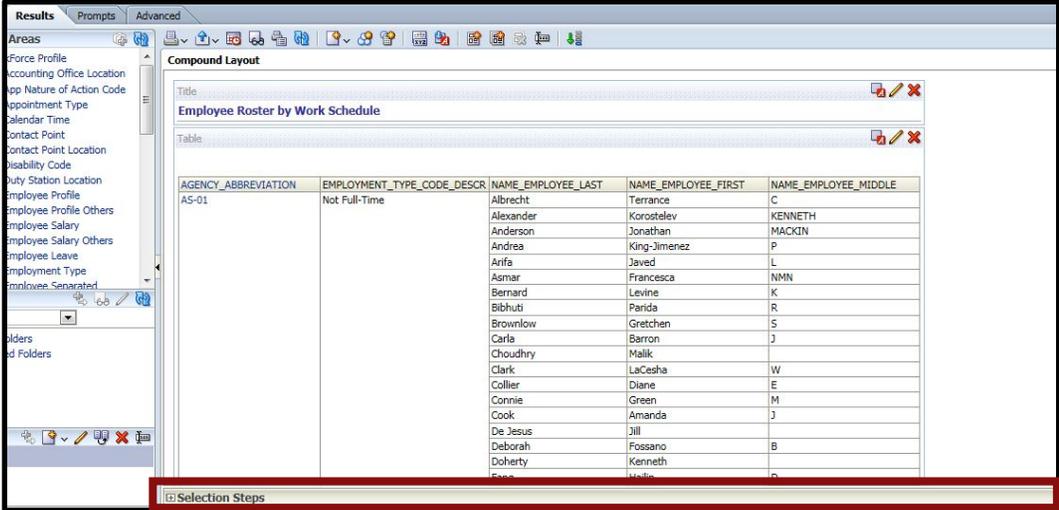
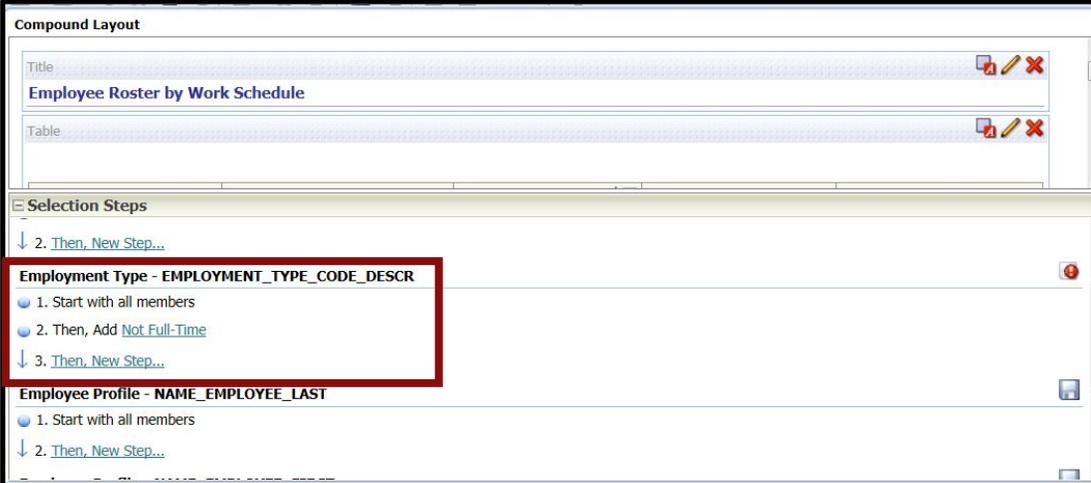


- Select the **Remove calculated item members from view** check box to prevent the individual values grouped together in the new calculated item from appearing within the report. Click **OK**.

Figure 229: Remove Calculated Item Members From View Checkbox Highlighted

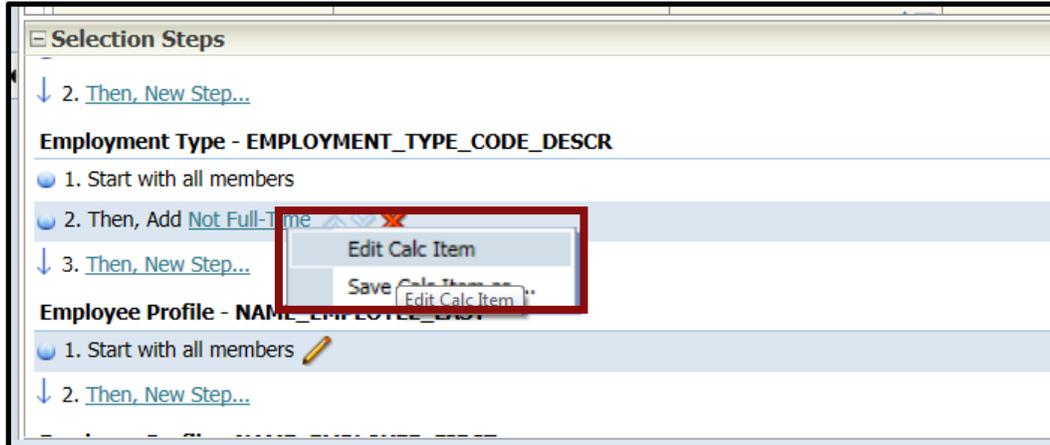


Edit/Save a Calculated Item

Step	Action																																																																																																				
1.	<p>Expand the Selection Steps pane within the Results tab.</p> <p><i>Figure 230: Selection Steps Pane Highlighted in the Results Tab</i></p>  <p>The screenshot shows a software interface with a 'Results' tab. On the left is a tree view of 'Areas' including 'Force Profile', 'Accounting Office Location', 'App Nature of Action Code', 'Appointment Type', 'Calendar Time', 'Contact Point', 'Contact Point Location', 'Disability Code', 'Duty Station Location', 'Employee Profile', 'Employee Profile Others', 'Employee Salary', 'Employee Salary Others', 'Employee Leave', 'Employment Type', and 'Employee Separated'. The main area is a 'Compound Layout' containing a table titled 'Employee Roster by Work Schedule'. The table has columns: AGENCY_ABBREVIATION, EMPLOYMENT_TYPE_CODE_DESCR, NAME_EMPLOYEE_LAST, NAME_EMPLOYEE_FIRST, and NAME_EMPLOYEE_MIDDLE. The 'Selection Steps' pane is visible at the bottom of the table, highlighted with a red border.</p> <table border="1" data-bbox="516 617 1273 919"> <thead> <tr> <th>AGENCY_ABBREVIATION</th> <th>EMPLOYMENT_TYPE_CODE_DESCR</th> <th>NAME_EMPLOYEE_LAST</th> <th>NAME_EMPLOYEE_FIRST</th> <th>NAME_EMPLOYEE_MIDDLE</th> </tr> </thead> <tbody> <tr><td>AS-01</td><td>Not Full-Time</td><td>Albrecht</td><td>Terrance</td><td>C</td></tr> <tr><td></td><td></td><td>Alexander</td><td>Korostelev</td><td>KENNETH</td></tr> <tr><td></td><td></td><td>Anderson</td><td>Jonathan</td><td>MACKIN</td></tr> <tr><td></td><td></td><td>Andrea</td><td>King-Jimenez</td><td>P</td></tr> <tr><td></td><td></td><td>Arifa</td><td>Javed</td><td>L</td></tr> <tr><td></td><td></td><td>Asmar</td><td>Francesca</td><td>NMN</td></tr> <tr><td></td><td></td><td>Bernard</td><td>Levine</td><td>K</td></tr> <tr><td></td><td></td><td>Bibhuti</td><td>Parida</td><td>R</td></tr> <tr><td></td><td></td><td>Brownlow</td><td>Gretchen</td><td>S</td></tr> <tr><td></td><td></td><td>Carla</td><td>Barron</td><td>J</td></tr> <tr><td></td><td></td><td>Choudhry</td><td>Malik</td><td></td></tr> <tr><td></td><td></td><td>Clark</td><td>LaCesha</td><td>W</td></tr> <tr><td></td><td></td><td>Collier</td><td>Diane</td><td>E</td></tr> <tr><td></td><td></td><td>Connie</td><td>Green</td><td>M</td></tr> <tr><td></td><td></td><td>Cook</td><td>Amanda</td><td>J</td></tr> <tr><td></td><td></td><td>De Jesus</td><td>Jill</td><td></td></tr> <tr><td></td><td></td><td>Deborah</td><td>Fossano</td><td>B</td></tr> <tr><td></td><td></td><td>Doherty</td><td>Kenneth</td><td></td></tr> <tr><td></td><td></td><td>...</td><td>...</td><td>...</td></tr> </tbody> </table>	AGENCY_ABBREVIATION	EMPLOYMENT_TYPE_CODE_DESCR	NAME_EMPLOYEE_LAST	NAME_EMPLOYEE_FIRST	NAME_EMPLOYEE_MIDDLE	AS-01	Not Full-Time	Albrecht	Terrance	C			Alexander	Korostelev	KENNETH			Anderson	Jonathan	MACKIN			Andrea	King-Jimenez	P			Arifa	Javed	L			Asmar	Francesca	NMN			Bernard	Levine	K			Bibhuti	Parida	R			Brownlow	Gretchen	S			Carla	Barron	J			Choudhry	Malik				Clark	LaCesha	W			Collier	Diane	E			Connie	Green	M			Cook	Amanda	J			De Jesus	Jill				Deborah	Fossano	B			Doherty	Kenneth			
AGENCY_ABBREVIATION	EMPLOYMENT_TYPE_CODE_DESCR	NAME_EMPLOYEE_LAST	NAME_EMPLOYEE_FIRST	NAME_EMPLOYEE_MIDDLE																																																																																																	
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		Deborah	Fossano	B																																																																																																	
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2.	<p>Locate the data element used to create the calculated item from the Selection Steps pane.</p> <p><i>Figure 231: Selection Steps Pane with Data Element Highlighted</i></p>  <p>The screenshot shows the 'Selection Steps' pane expanded. It contains a list of steps for 'Employment Type - EMPLOYMENT_TYPE_CODE_DESCR' and 'Employee Profile - NAME_EMPLOYEE_LAST'. The first step for 'Employment Type' is highlighted with a red border: '1. Start with all members', '2. Then, Add Not Full-Time', and '3. Then, New Step...'. The second step is '2. Then, Add Not Full-Time'.</p>																																																																																																				

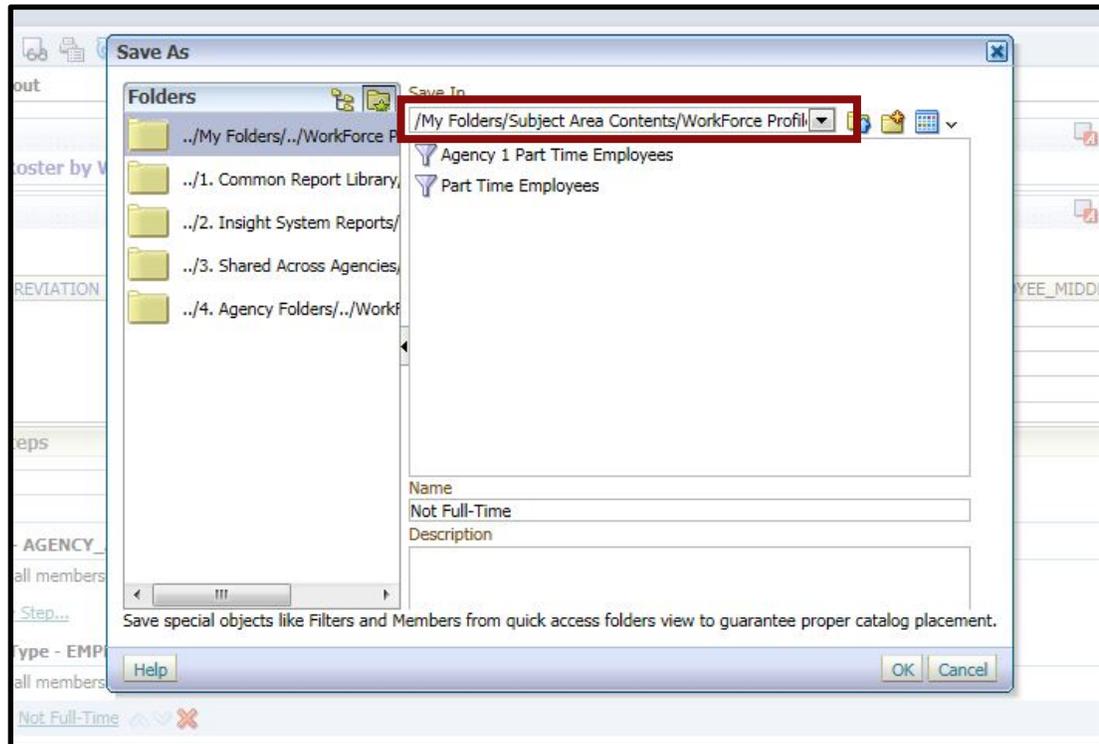
3. Select the action link displaying the name of the calculated item. A drop-down menu appears allowing the user to choose whether to edit the calculated item or save the calculated item to the Catalog.

Figure 232: Selection Steps Pane with Data Element Drop-Down Menu Highlighted



4. Select **Save Calc Item** and the Save As window appears. Save the calculated item within the Subject Area Contents folder in My Folders (default).

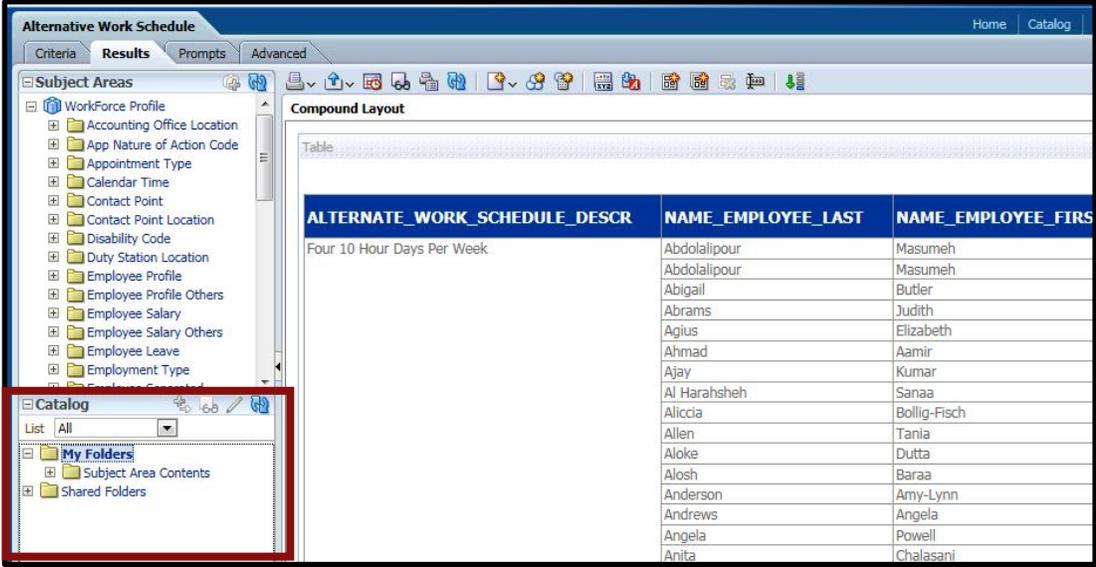
Figure 233: Save As Window with Calculated Item



IMPORTANT: *Insight* will automatically recommend that the user saves the new calculated item to a folder with the title of the Subject Area from which the item was created (e.g., Workforce Profile). Users should comply with this recommended location in order to use the calculated item in future reports.

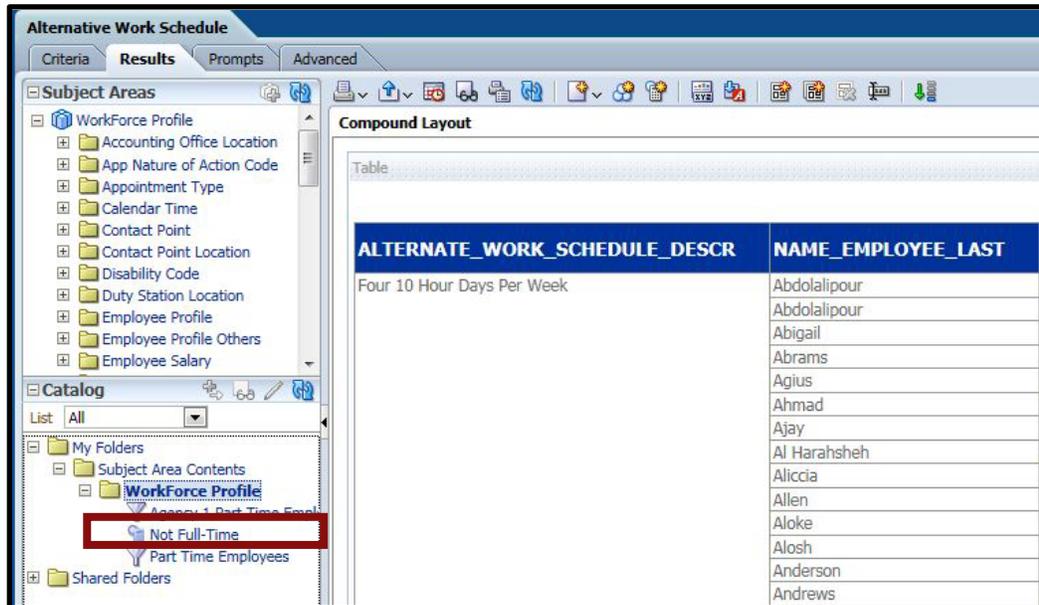
Notes:

8.3. Use a Saved Calculated Item in a Report

Step	Action
1.	<p>Navigate to the Catalog pane within the Results tab of the ad hoc report editing page.</p> <p style="text-align: center;"><i>Figure 234: Results Tab with Catalog Pane Highlighted</i></p> 
	<p>TIP: Saved calculated items can only be added to reports that contain the data element whose values were grouped using the calculated item.</p>
	<p>IMPORTANT: The Subject Area of the calculated item(s) must correspond to the Subject Area used to create the report.</p>

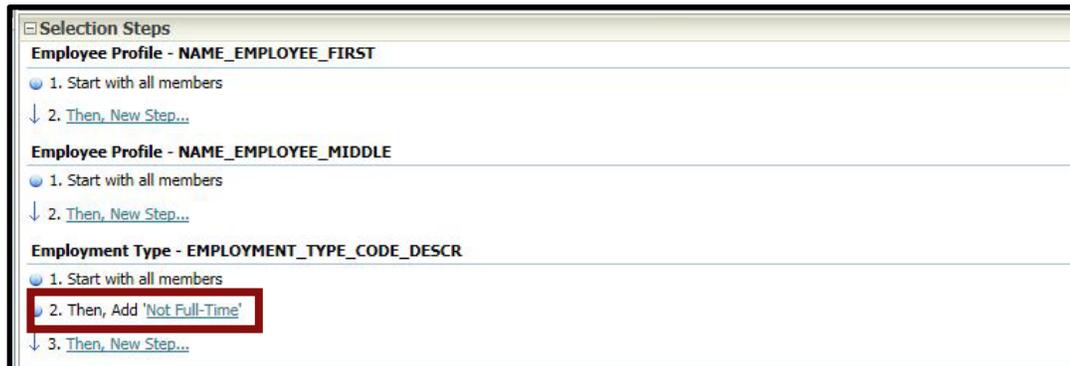
2. Double-click the saved calculated item.

Figure 235: Calculated Item within the Catalog Pane Highlighted



3. The report will update with the grouped values of the calculated item. Navigate to the **Selection Steps** pane to confirm the calculated item has been added to the report.

Figure 236: Selected Steps with Calculated Item Highlighted



 **TIP:** Use the List drop-down menu within the Selection Steps pane to choose from a list of data elements included in the report.

4. Click the **Save As** icon to save changes to the report.

8.4. Create Calculated Items: Exercises

Exercise 8.1: Create a New Calculated Item

Scenario: Emily needs to create a report that outlines appointment type, PATCO, and Pay Plan by agency. She would like to consolidate types of appointment to make the report easier to read.

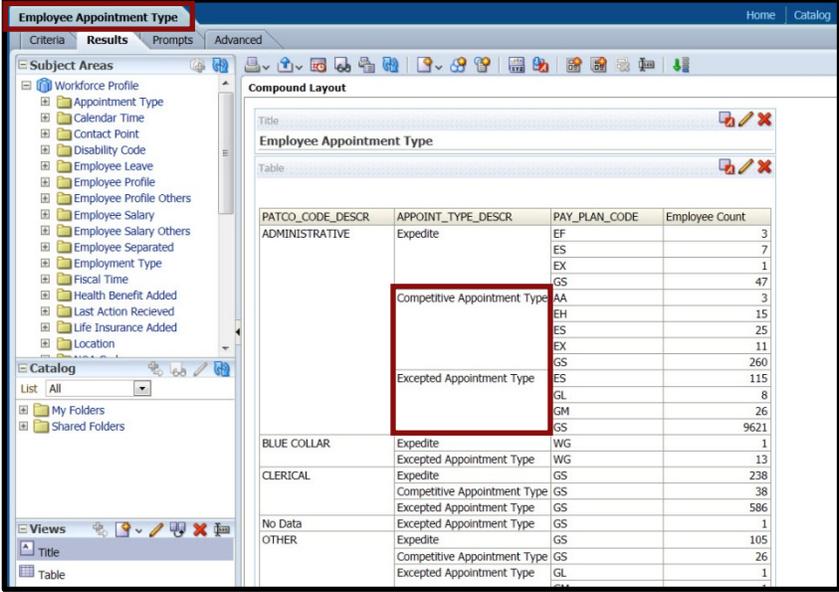
Instructions: Follow the steps below to complete the exercise in *Insight*:

1. Click the **New** action link from the top navigation bar.
2. Select **Analysis** from the menu of options.
3. From the Select Subject Area window, select **Workforce Profile**.
4. From the **Subject Areas** pane of the **Criteria** tab, double-click the data elements outlined below to add them to the **Selected Columns** pane:
 - a. From the Appointment Type folder, select APPOINT_TYPE_DESCR.
 - b. From the PATCO folder, select PATCO_CODE_DESCR.
 - c. From the Pay Plan folder, select PAY_PLAN_CODE.
 - d. From Workforce Biweekly, select Employee Count.
5. Navigate to the **Results** tab. Reorder the columns to following the following order:
 - a. PATCO_CODE_DESCR
 - b. APPOINT_TYPE_DESCR
 - c. PAY_PLAN_CODE
 - d. Employee Count
6. From the Results tab navigation bar, click the **New Calculated Item** icon.
7. Within the Display label, type “Competitive Appointment Type”.
8. From the Values From drop-down menu select “**Appointment Type.APPOINT_TYPE_DESCR**”.
9. From the Function drop-down menu select **Sum**.
10. Select the following values in the **Available** pane and move them to the **Selected** pane by using the blue “Move” arrow:
 - a. Competitive – Career, Conditional
 - b. Competitive – SES Career

- c. Competitive – Temporary, Special Need, SES
 - d. Competitive – Term, Taper, Indefinite, SES - Military
11. Select the **Remove calculated item members from view** check box and click **OK**.
 12. Repeat the steps 6-11 to create a New Calculated item within APPOINT_TYPE_DESCR titled “Excepted Appointment Type” using the values below:
 - a. Excepted-Excepted – Limited (More than 1)
 - b. Excepted-Permanent, SES-Non-career
 - c. Excepted-Temporary, SES-Time Limited Noncareer
 13. From the **Results** tab, click the **Save As** icon and save the report as “Employee Appointment Type” in My Folders.
 14. Click **OK**.

Check Your Work:

Figure 237: Competitive Appointment Type and Excepted Appointment Type Calculated Items



PATCO_CODE_DESCR	APPOINT_TYPE_DESCR	PAY_PLAN_CODE	Employee Count
ADMINISTRATIVE	Expedite	EF	3
		ES	7
		EX	1
		GS	47
		AA	3
		EH	15
		ES	25
		EX	11
		GS	260
		ES	115
		GL	8
BLUE COLLAR	Expedite	WG	1
	Excepted Appointment Type	WG	13
CLERICAL	Expedite	GS	238
	Competitive Appointment Type	GS	38
	Excepted Appointment Type	GS	586
No Data	Excepted Appointment Type	GS	1
OTHER	Expedite	GS	105
	Competitive Appointment Type	GS	26
	Excepted Appointment Type	GL	1

8.5. Chapter Review

Chapter Summary

Having completed this chapter, you should now be able to:

- Demonstrate how to create a new calculated item
- Demonstrate how to use a saved calculated item in a new or existing report

Notes:

9.0. Create Managerial Reports Using Action Links

9.1. Chapter Overview

This chapter will review how users can build ad hoc managerial reports by creating action links that drill-down to an operational report.

Chapter Objectives

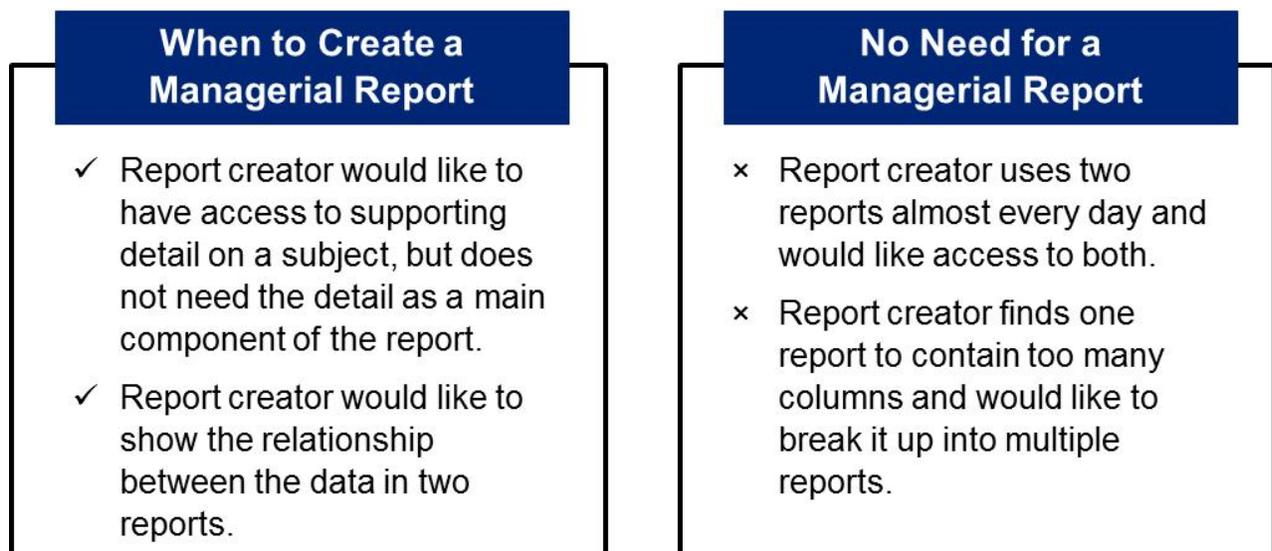
After completing this course, you will be able to:

- Describe scenarios when reports should use action links
- Demonstrate how to create an action link to an existing report

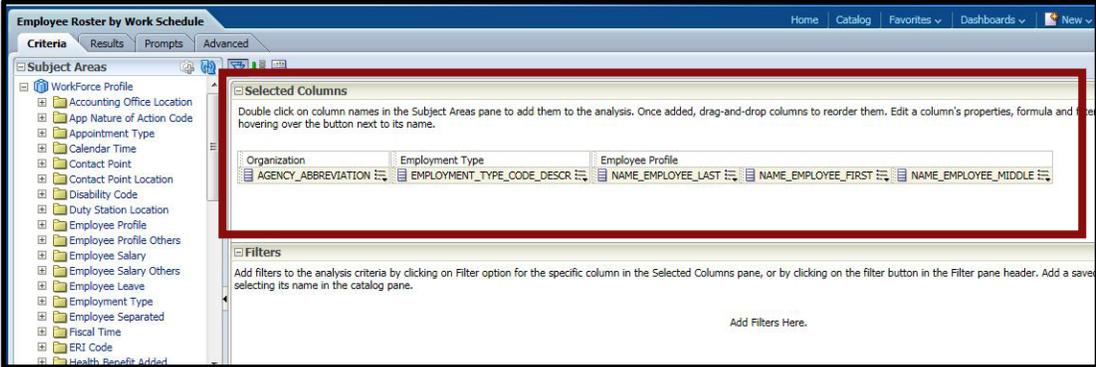
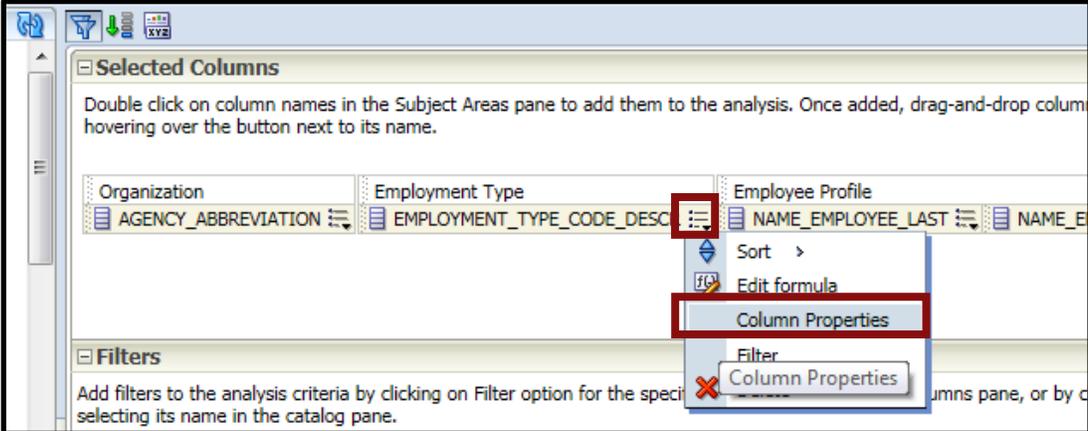
9.2. When to Create a Managerial Report

Insight allows users to create managerial reports with action links that navigate to a more detailed report.

Figure 238: Creating Managerial Reports

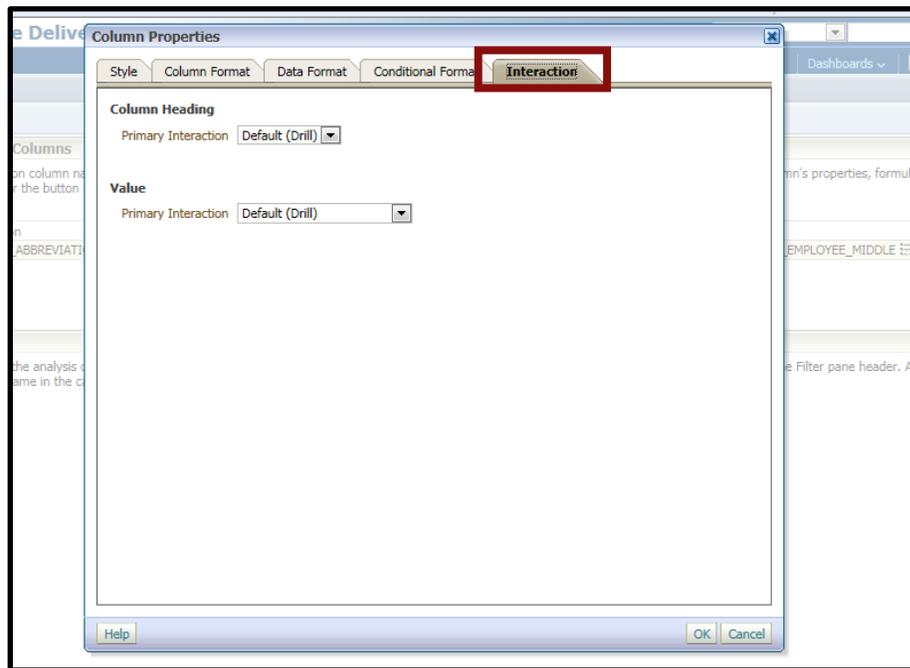


9.3. Create an Action Link Within a Report

Step	Action
1.	<p>Navigate to the Selected Columns pane from the Criteria tab.</p> <p><i>Figure 239: Criteria Tab with Selected Columns Pane Highlighted</i></p> 
2.	<p>Click the Edit icon for the targeted data element and select Column Properties from the drop-down menu.</p> <p><i>Figure 240: Data Element Edit Icon Drop-Down Menu with Column Properties Highlighted</i></p> 
	<p>IMPORTANT: Action links cannot be applied to Grand Totals or Sub-Totals within a table.</p>

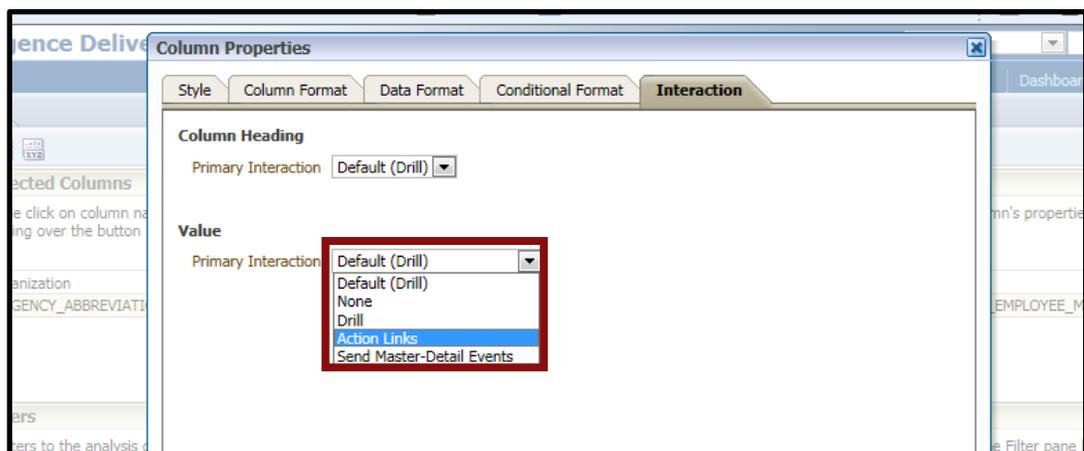
3. Navigate to the Interaction tab.

Figure 241: Column Properties Window with Interaction Tab Highlighted



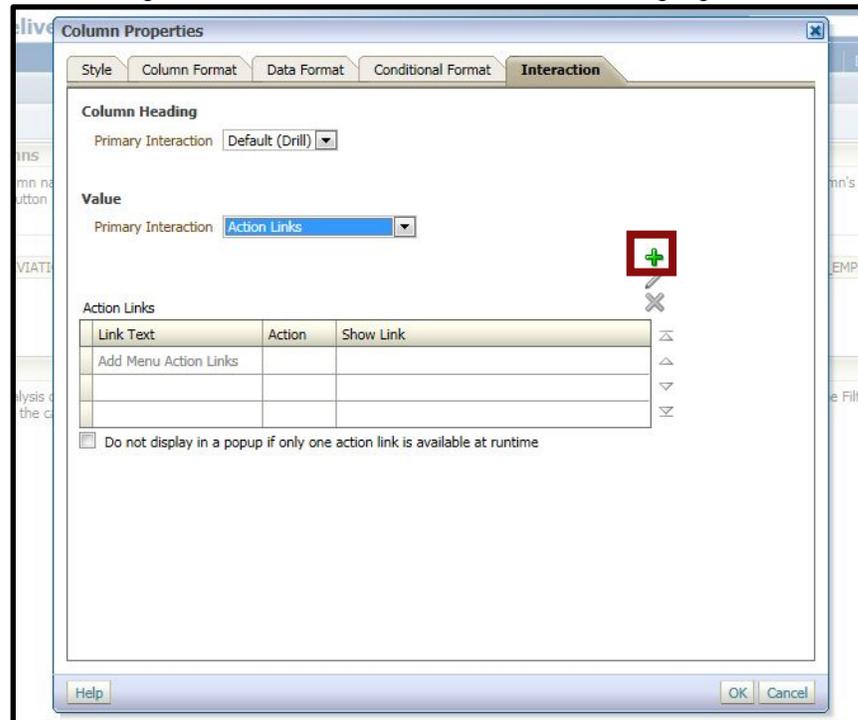
4. Use the Primary Interaction drop-down menu to change the **Primary Interaction** to Action Links.

Figure 242: Interaction Tab with Value Primary Interaction Drop-Down Menu Highlighted



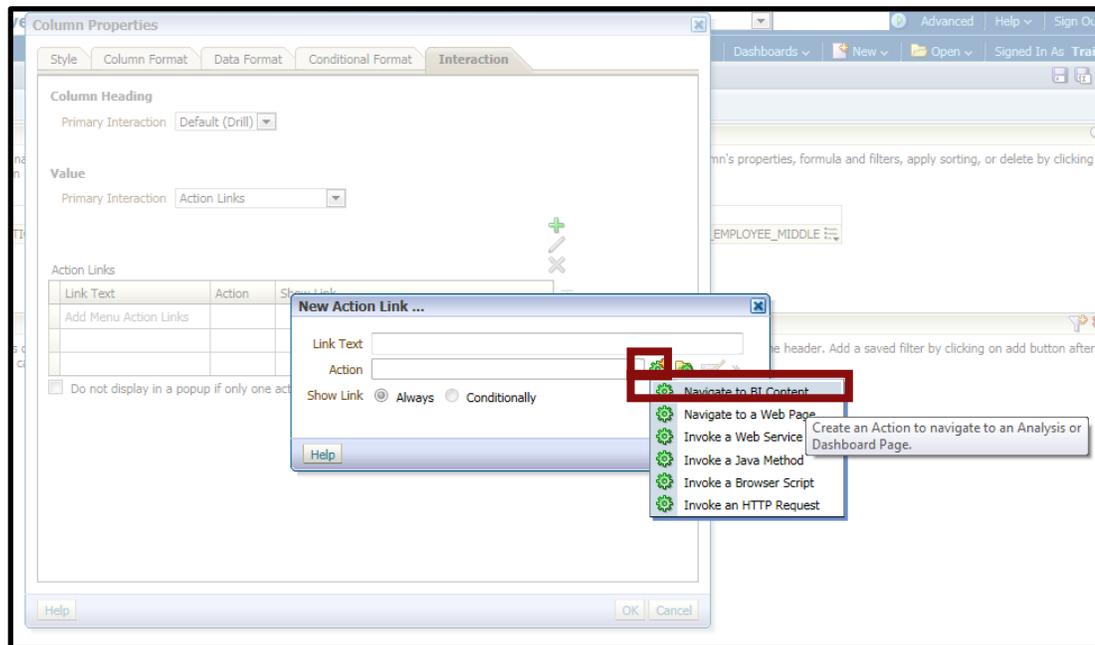
5. Click the **New** icon to open the New Action Link window.

Figure 243: Interactions Tab with New Icon Highlighted



6. Select **Navigate to BI Content** from the drop-down menu.

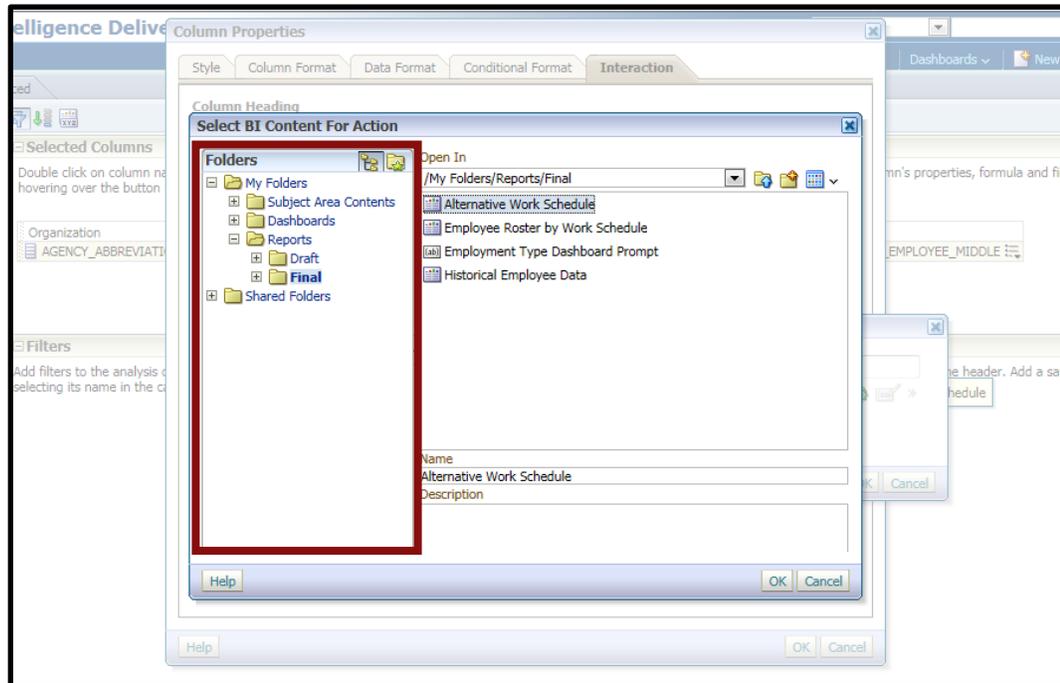
Figure 244: New Action Link Window with BI Content Drop-Down Menu



New Action Link: Creates a new action link in a report or dashboard providing access to an existing report.

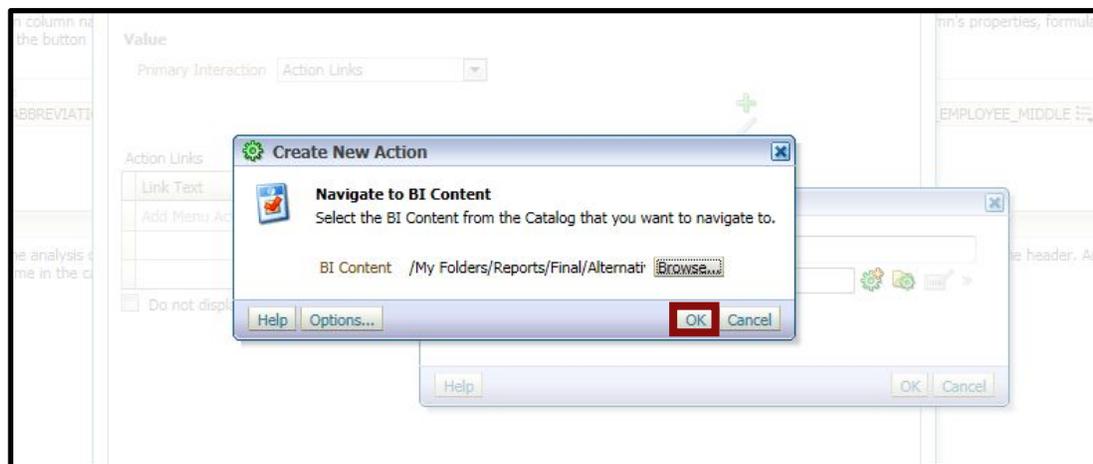
7. Navigate to the **Folders** pane to select the existing report from the Catalog targeted for the drill-down. Click **OK**.

Figure 245: Select BI Content For Action Window with Folders Pane Highlighted



8. View the Create New Action window and click **OK**.

Figure 246: Create New Action Link Window



9. View the New Action Link window which has updated with the report selected in the previous step. Click **OK**.

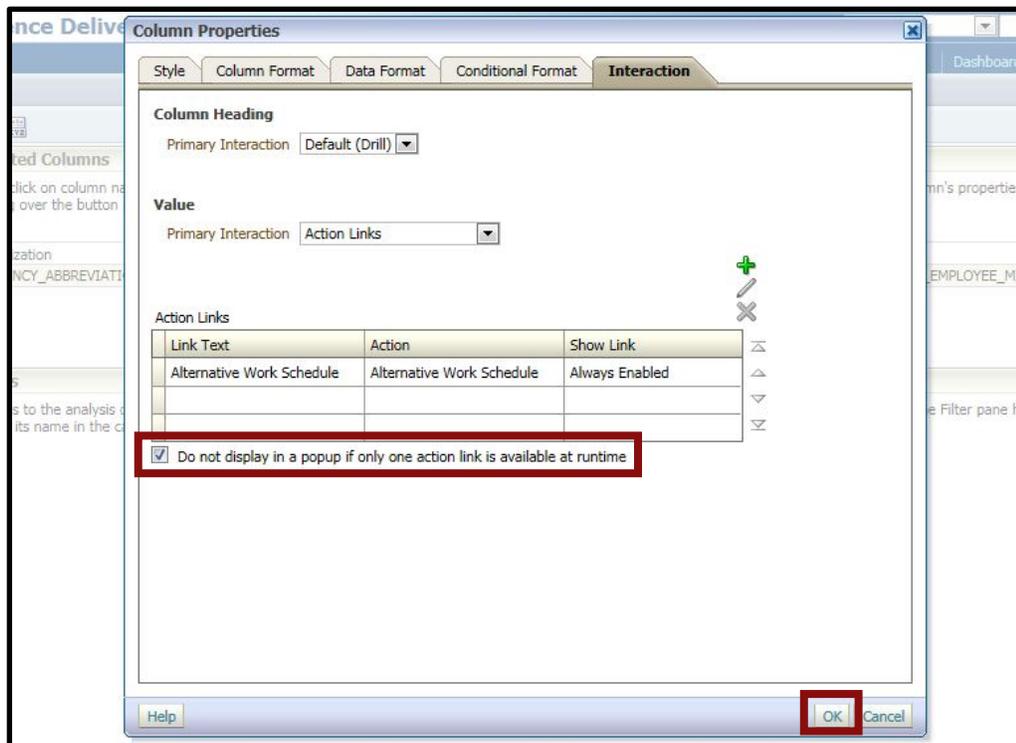
Figure 247: New Action Link Window with Show Link Options Highlighted



-  **TIP:** By default, action links appears for all values. Select the Conditionally radio button to update the action link to appear under restricted conditions.

10. Click the **Do not display in a popup if only one action link is available at runtime** check box from the Interaction tab. Click **OK**.

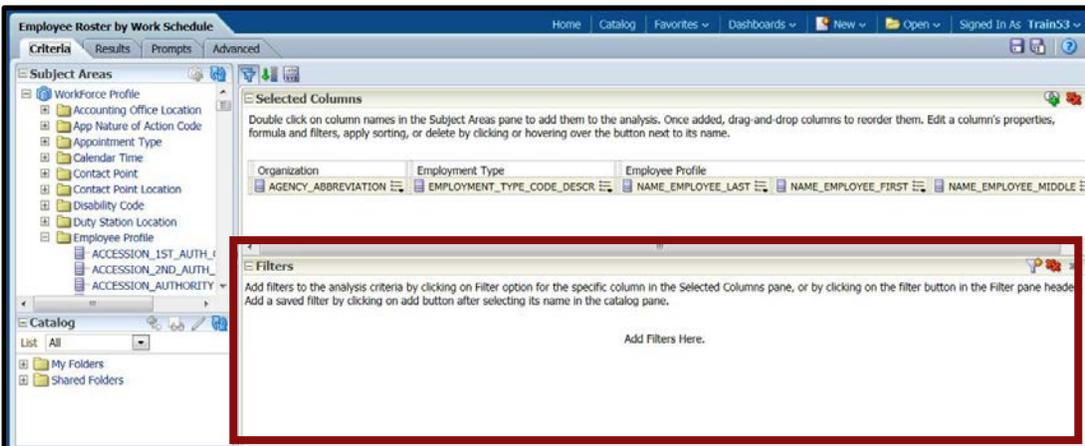
Figure 248: Do Not Display in a Popup if Only One Action Link is Available at Runtime Checkbox

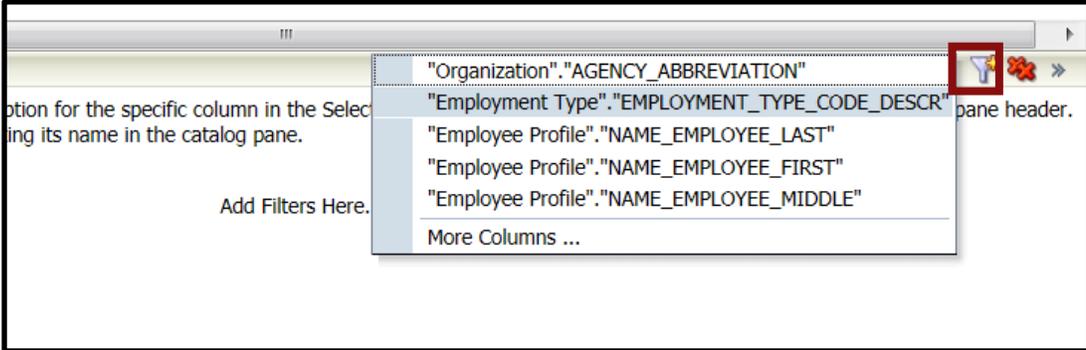
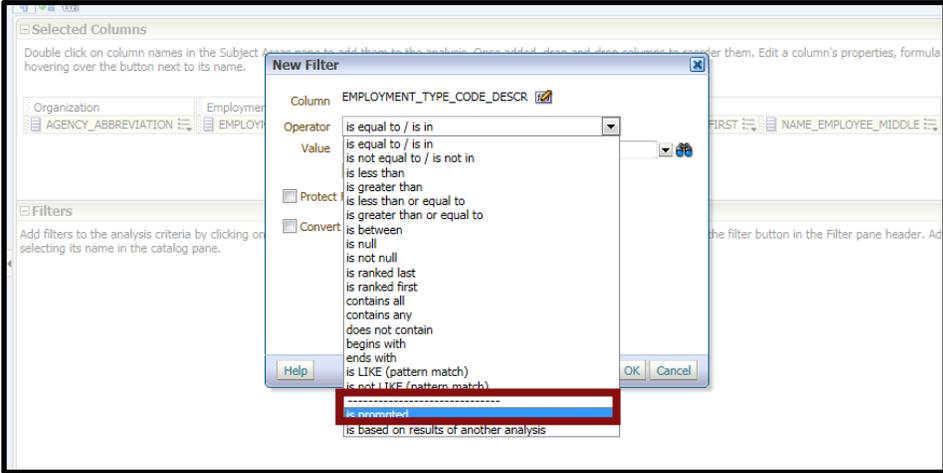


11.	Click the Save As icon and save the report with a title indicating it is a managerial report.
	IMPORTANT: For action links to properly filter for the data element to which they are applied, users must apply Is Prompted filters for that data element in both the managerial and drill-down reports. Review section 5.5 Create a New Dashboard Prompt for an overview of how to add the Is Prompted filter.



QUICK TIP: Add Is Prompted Filters to the Managerial and Drill-Down Reports

Step	Action
1.	Navigate to the Criteria tab of the managerial report and locate the Filters pane. <p style="text-align: center;"><i>Figure 249: Filters Pane in the Criteria Tab</i></p> 

2.	<p>Click the Filters icon and select the data element on which to create a filter.</p> <p><i>Figure 250: Data Element List in Filters pane</i></p> 
3.	<p>From the Operator drop-down, select Is Prompted. Click OK.</p> <p><i>Figure 251: New Filter Window with Is Prompted Highlighted</i></p> 
4.	Click the Save icon to save the managerial report with the Is Prompted filter.
5.	Click the Catalog action link in the top navigation bar and navigate to the drill-down report.
6.	Navigate to the Criteria tab of the drill-down report and locate the Filters pane.
7.	Click the Filters icon and select the data element on which to create a filter.
8.	From the Operator drop-down, select Is Prompted . Click OK .
9.	Click the Save icon to save the drill-down report with the Is Prompted filter.

Drill-down in a Managerial Report

Step	Action
1.	<p>Navigate to the saved managerial report and run the report after the managerial and drill-down reports have the Is Prompted filter. The values in the column targeted with the action link will be hyperlinked.</p> <p><i>Figure 252: Action Links Highlighted in a New Managerial Report</i></p> 
2.	<p>Click the hyperlinked values and the drill-down report appears, filtered by the selection.</p> <p><i>Figure 253: Managerial Action Link Drill-Down Results</i></p> 

9.4. Create Managerial Reports Using Action Links: Exercises

Exercise 9.1: Use Action Links to Create an Ad Hoc Managerial Report

Scenario: Emily needs to create a report for her manager that displays PATCO information by Agency and also provides specific information about employee appointment type. To do this, she will create a managerial report with the option to drill-down into PATCO to see the appointment type for each PATCO category.

Instructions: Follow the steps below to complete the exercise in *Insight*:

1. Click the **Catalog** action link from the top navigation bar.
2. Click **My Folders** to show folder contents.
3. Click the **Edit** action link corresponding to “Employee Appointment Type” report that was saved in a previous exercise.
4. Within the **Criteria** tab, click the **Filters** icon from the **Filters** pane and select “PATCO.” PATCO_CODE_DESCR” from the drop-down menu.
5. In the New Filter window, select **Is Prompted** from the Operator drop-down menu. Click **OK**.
6. Click the **Save** icon from the report navigation bar.
7. Click the **Catalog** action link from the top navigation bar.
8. Click **My Folders** and click the **Edit** action link corresponding to the “PATCO by Agency” report that was saved in a previous exercise.
9. Navigate to the **Criteria** tab.
10. Click on the **Filters** icon from the **Filters** pane and select “PATCO”, “PATCO_CODE_DESCR” from the drop-down menu.
11. In the New Filter window, select **Is Prompted** from the Operator drop-down menu. Click **OK**.
12. From the **Selected Columns** pane, click on the **Edit** icon for the PATCO_CODE_DESCR data element and select **Column Properties**.
13. Navigate to the **Interaction** tab in the Column Properties window.
14. In Value, select **Action Links** from the Primary Interaction drop-down menu.

15. Click on the **New** icon to open the New Action Link window.
16. Click the **New Action Link** icon and select **Navigate to BI Content**.
17. Within My Folders select the report titled “Employee Appointment Type” and click **OK**.
18. The Create New Action window appears, click **OK**.
19. Click **OK** from the New Action Link window.
20. Select the **Do not display in a popup if only one action link is available at runtime** check box
21. Click **OK** in the Column Properties window.
22. Navigate to the **Results** tab and click the **Save As** icon.
23. Save the report to My Folders as “PATCO by Agency Managerial Report”.
24. Click the **Catalog** action link and navigate to the recently saved PATCO by Agency Managerial Report.
25. Click the **Open** action link corresponding to the report.
26. Click on the values within the PATCO_CODE_DESCR to drill-down to the “Employee Appointment Type” report and click **OK**.

Check Your Work:

Figure 254: PATCO by Agency Managerial Report

Agency Code- Name	PATCO_CODE_DESCR	Employee Count
01-Agency for Service Area 1	ADMINISTRATIVE	29
	CLERICAL	6
	OTHER	6
	PROFESSIONAL	83
	TECHNICAL	1
02-Agency for Service Area 2	ADMINISTRATIVE	31
	CLERICAL	3
	OTHER	1
03-Agency for Service Area 3	ADMINISTRATIVE	50
	CLERICAL	12
	OTHER	2
	PROFESSIONAL	1
04-Agency for Service Area 4	ADMINISTRATIVE	1009
	CLERICAL	36
	OTHER	14
	PROFESSIONAL	154
	TECHNICAL	53
05-Agency for Service Area 5	ADMINISTRATIVE	71
	CLERICAL	5
	OTHER	16
	PROFESSIONAL	45
06-Agency for Service Area 6	ADMINISTRATIVE	8
	CLERICAL	303
	OTHER	3

Figure 255: Employee Appointment Type Drill-Down Operational Report

Employee Appointment Type			
PATCO_CODE_DESCR	APPOINT_TYPE_DESCR	PAY_PLAN_CODE	Employee Count
ADMINISTRATIVE	Expedite	EF	3
		ES	7
		EX	1
		GS	47
	Competitive Appointment Type	AA	3
		EH	15
		ES	25
		EX	11
	Excepted Appointment Type	GS	260
		ES	115
		GL	8
		GM	26
		GS	9621

9.5. Chapter Review

Chapter Summary

Having completed this chapter, you should now be able to:

- Describe scenarios when reports should use action links
- Demonstrate how to create an action link to an existing report

Notes:



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10.0. Course Summary

10.1. Course Accomplishments

Having completed this course, participants should now be able to:

- Demonstrate how to create a new report using basic ad hoc functionality
- Demonstrate how to edit an existing dashboard or create a new dashboard using basic ad hoc functionality
- Demonstrate how to restrict data in reports using filters and prompts
- Demonstrate how to customize reports with tables and pivot tables
- Demonstrate how to customize reports by writing formulas
- Demonstrate how to manipulate data elements using calculated items
- Demonstrate how to create drill-down capability within a report

10.2. Additional Resources

For additional resources please refer to the *Insight* website: www.nfc.usda.gov/insight

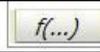


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11.0. Appendices

11.1. Appendix A: Course Glossary

Term	Icon	Description
Add Dashboard Page		Adds a new page to the dashboard.
Advanced tab	N/A	Provides users with access to view analysis by XML code, SQL, and SQL clauses.
Catalog pane	N/A	Lists My Folders and Shared Folders containing saved reports, dashboards, filters, prompts, etc.
Clear All Sorts in All Columns	N/A	Clears all sorts in a report.
Clear Sort	N/A	Clears sort for that specific column.
Column		Allows users to choose the data element(s) to use in the formula.
Column Format tab	N/A	Allows users to customize the report column heading and the way data is grouped within columns (e.g., merge common cells or remain separate).
Column Properties tab	N/A	Allows users to visually format the styles and appearance of the column (e.g., font, colors, conditional formatting, etc.).
Columns and Measures	N/A	Adds sums and format headings/values, etc.
Concatenate		Joins multiple data elements together so the values of each data element are merged in a single cell.
Conditional Format	N/A	Allows users to highlight certain data elements within the column based on a defined condition.

Term	Icon	Description
Criteria tab	N/A	Allows users to add/remove data elements or “columns” included in the report, apply basic edits such as styles/formatting, filters, sorting, etc.
Data Format tab	N/A	Allows users to customize how the data appears within a report column (e.g., as a number, text, percentage, etc.).
Delete		Deletes a data element, report component, or dashboard component.
Delete Current Page		Deletes the current dashboard page.
Divide		Decreases the value by a defined increment (E.g., to decrease by 50% use *.5).
Edit Formula	N/A	Allows users to create a formula to change how the data in the column appears or to combine columns (e.g., First Name, Last Name = First Name Last Name).
Edit View		Customizes the structure and/or styles of a report component (e.g. Title, Graph, table, etc.) within the Results tab.
Excluded	N/A	Temporarily removes columns from appearing in the table.
Filter		Restricts data to certain fields before the report runs.
Format Heading		Provides a menu of options to customize headings or titles in reports.
Format Text		Allows users to customize the style of text.
Function		Contains a menu of functions to modify a data element.

Term	Icon	Description
Horizontal Layout		Arranges items in a dashboard section horizontally.
Import Formatting		Applies the formatting from an existing report to a new ad hoc report.
Interaction tab	N/A	Allows users to add action links to column headings and values.
More Options		Allows users to save a group of filters as an independent item in the Catalog.
Minus		Decreases the value by a defined amount (E.g., to decrease by 50, use -50).
Multiply		Increases the value by a defined increment (E.g., to increase by 50% use *1.5).
New Action Link		Creates a new action link in a report or dashboard providing access to an existing report.
New Calculated Item		Group values of a data element into a defined set.
New		Creates a new item for the function that the user is editing.
New View		Displays a menu of additional components (e.g., graph, static text, narrative text, etc.) to include in a report.
Operator	N/A	Determines the type of restriction applied to the report (e.g., is equal to, is greater than, etc.).
Pivot Tables	N/A	Organizes data in an interactive table that can be manipulated, displaying data in a dynamic way to reveal patterns and relationships.
Plus		Increases the value by a defined amount (E.g., to increase by 50, use +50).

Term	Icon	Description
Preview		Previews a dashboard before it runs in a new window.
Print Options		Customizes the print settings for the report.
Prompts tab	N/A	Provides users with the ability to create report prompts that allow the report consumer to manipulate restrictions on data displayed in the report.
Properties		Displays a menu of options to format a component of a report or dashboard. Options will vary depending on the type of component a user is editing.
Rename		Renames a dashboard or report components.
Results tab	N/A	Allows users to view the result of the selected data elements and formatting in the Criteria tab, add components to the report such as text tables, and graphs.
Run		Runs the dashboard to view results.
Save		Saves the changes made to an existing report or dashboard, or saves the report or dashboard to a particular location.
Save As		Provides a new name for a report or dashboard and saves it in the Catalog.
Sections	N/A	Separates the report table into individual segments based on a specific data element.
Selected Columns pane	N/A	Allows users to apply a variety of customizations to each data element included as a column in the report.

Term	Icon	Description
Sort	N/A	Sorts the way data is displayed (e.g. ascending, descending, etc.).
Static Text	N/A	Includes a text component to the report (e.g., PII Do Not Distribute).
Style		Applies Style and Conditional Formatting to a graph view.
Style tab	N/A	Provides users with a number of options to customize the appearance of fonts, cells, and borders of a column or graph.
Subject Areas pane	N/A	Lists the available data elements within that Subject Area.
Table Prompts	N/A	Creates a drop-down menu to allow users to manipulate how data is restricted in a report by toggling between values.
Table	N/A	Organizes data in a structure of rows and columns, displaying a static view of the relationship between data.
Title	N/A	Adds a title to the report (e.g., Employee Profile Report) and/or indicate the day and time a report is run.
Totals		Displays a menu of options to apply sub-totals and/or grand totals in a report table.
Vertical Layout		Arranges items in a dashboard section vertically.