Insight: Creating Reports and Dashboards

May 2013
## Agenda

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Training Overview

**Insight: Creating Reports and Dashboard Overview**

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

**Insight: Creating Ad Hoc Reports and Dashboards 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
Session Expectations and Ground Rules

- Sign the attendance sheet
- Feel free to ask questions
- Be respectful of other participants
- Keep us on schedule with timely returns from breaks
- Share your knowledge, experience and ideas
- Use the “Parking Lot” to revisit discussion topics
- Give helpful feedback
- Turn off your cell phones and refrain from checking email
Introductions

Please introduce yourself, providing the following information:

• Name
• Organization or Agency
• Description of position
• Fun fact about yourself
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Apply Basic Edits to Common Reports
Apply Basic Edits to Common Reports 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.

Apply Basic Edits to Common Reports 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
Demonstration in *Insight*
Exercise 2.1 and 2.2

Refer to the Participant Guide to complete the following exercises:

• **Exercise 2.1**: Add Context to a Report

• **Exercise 2.2**: Sort Data in a Report

Your turn!
Apply Custom Styles and Formatting

Users can customize common reports by editing the styles and formatting of report columns.

Select Column Properties to open the Column Properties window from the Properties drop-down menu.

Tabs in the Column Properties window provide users with styles and formatting editing options.
Users can update reports with disclaimers or additional context in order to communicate information to the report audience.

Select a view to include in a report from the New View drop-down menu.
Apply Basic Edits to Common Reports Review

Apply Basic Edits to Common Reports Accomplishments

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
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Create Managerial Reports Using Action Links

Course Summary
Create Ad Hoc Reports
Create Ad Hoc Reports Overview
This chapter will review how Insight’s ad hoc report capabilities allow users to create new reports to meet their organization’s unique reporting needs.

Create Ad Hoc Reports Objectives
After completing 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
Create Ad Hoc Reports

Demonstration in *Insight*
Exercise 3.1, 3.2, and 3.3

Refer to the Participant Guide to complete the following exercises:

• **Exercise 3.1:** Create an Ad Hoc Report

• **Exercise 3.2:** Edit the Styles and Formatting of a Report

• **Exercise 3.3:** Create a Graph

*Your turn!*
Users can customize the structure of a report from the Layout pane. The Layout pane allows users to target data for Table Prompts, Sections, Totals, and exclude data elements from a report.

Based on targeted data elements, the Layout pane allows users to break the report into Sections and Table Prompts, add Totals, and more.
Using drag and drop capability, *Insight* ad hoc functionality enables users to quickly create custom reports with their organization’s data.

The Subject Areas pane lists data elements available for report creation.

Drag and drop data elements from the Subject Area pane into the Selected Columns pane.
Create New Graphs in a Report

*Insight* allows users to create and format graphs directly within a report to provide a visual representation of the data.

Structure a graph by dragging and dropping data elements within the Layout pane.

Click the Properties icon to make stylistic and formatting edits to the graph.
Create Ad Hoc Reports Review

Create Ad Hoc Reports Accomplishments
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
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Customize and Create Ad Hoc Dashboards
Customize and Create Ad Hoc Dashboards 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.

Customize and Create Ad Hoc Dashboards 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
Customize and Create Dashboards

Demonstration in *Insight*
Exercise 4.1 and 4.2

Refer to the Participant Guide to complete the following exercises:

- **Exercise 4.1:** Edit a Common Dashboard
- **Exercise 4.2:** Create an Ad Hoc Dashboard
Customize Common Dashboards

Common dashboards serve as templates for users to customize for their unique needs by adding/removing components, updating print properties, and more.

Remove a component of a common dashboard by clicking the Delete icon.

Include and customize dashboard Headers and Footers and set page settings from the Print Options window.
Create Ad Hoc Dashboards

Creating an ad hoc dashboard allows users to create a summary view of reports that share a common theme and/or drive day-to-day decisions.

Drag and drop dashboard objects into the dashboard workspace to format the layout and add context to a dashboard.

Locate reports to include in a dashboard from the Catalog pane.
Customize and Create Ad Hoc Dashboards Review

Customize and Create Ad Hoc Dashboards Accomplishments

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
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Create Filters and Prompts
Create Filters and Prompts Overview

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

Create Filters and Prompts 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
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 way each time or can change.
- If the mechanism is a visible element of a report or a dashboard.

<table>
<thead>
<tr>
<th><strong>Filter</strong></th>
<th><strong>Report Prompt</strong></th>
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</thead>
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| - Restricts data within a report **before it runs**  
- Applies every time the report runs  
- **Not a visible component of the table or report**; works behind the scene of a report  | - 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 |

<table>
<thead>
<tr>
<th><strong>Table Prompt</strong></th>
<th><strong>Dashboard Prompt</strong></th>
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| - 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  | - 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 are applied within the Criteria tab of the ad hoc report editing page and restrict the data before the report is run.

Filters that are applied to a report are listed in the Filters pane within the Criteria tab.
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.

Table prompts are part of a table within the run view.

Selections in the table prompt actively restrict the values in the table.
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.

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

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

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

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

Demonstration in *Insight*
Exercise 5.1, 5.2, and 5.3

Refer to the Participant Guide to complete the following exercises:

- **Exercise 5.1:** Create a Filter Independent of a Report
- **Exercise 5.2:** Add a Saved Filter to a Report
- **Exercise 5.3:** Create and Apply a Dashboard Prompt

Your turn!
Create and Use Saved Filters

Users have the ability to create filters within a report or as stand alone objects to be used in future reports.

Create filters to restrict data to defined parameters in the New Filter window.

Double-click on a saved filter from the Catalog pane in the Criteria tab to apply it to a report.
Create a Table Prompt

Table prompts allow a user to manipulate restrictions on data within a report from the run view.

Drag and drop data elements into Table Prompts within the Layout pane.

The table prompt drop-down menu provides options to restrict the data in the report after it runs.
Create a Report Prompt

Report prompts appear on a page preceding the report in run view and allow users to customize restrictions on a report each time the report runs.

Navigate to the Prompts tab of the ad hoc report editing page to create a report prompt.

Customize the type of restriction, input, and other characteristics of the report.
Create a Dashboard Prompt

Users can create dashboard prompts to restrict the data returned across multiple reports within the dashboard.

Select Dashboard Prompt from the New action link menu.

Customize the dashboard prompt from the Prompts page.
Create Filters and Prompts Accomplishments

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
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Create Tables and Pivot Tables
Create Tables and Pivot Tables 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*.

Create Tables and Pivot Tables 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
Comparing Tables and Pivot Tables

Users have the ability to create tables and 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.

### Tables
- Organizes data in a simple structure of rows and columns
- Displays a static view of the relationship between data items
- Default view for attribute data elements

### Pivot Tables
- Organizes data in an interactive table that can be manipulated
- Displays data in a dynamic way to reveal patterns and relationships
- Default view for hierarchy data elements
- Must contain a measure
Create Tables and Pivot Tables

Demonstration in Insight
Exercise 6.1

Refer to the Participant Guide to complete the following exercise:

• Exercise 6.1: Create a Pivot Table

Your turn!
Create a Table Within a Report

Most reports in *Insight* will include a table by default, allowing users to customize the structure and layout of data in the report.

Select Table from New View drop-down menu to add a table to a report.

Tables are the default view to display data within a report.
Create a Pivot Table Within a Report

Pivot tables allow users to manipulate the way data displays in an Insight report to highlight trends or relationships among the data.

Select Pivot Table from the New View drop-down menu.

View and edit a pivot table from the Results tab.

Make edits to a pivot table in the Layout pane.
Create Tables and Pivot Tables Accomplishments

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
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Write Formulas in *Insight*
Write Formulas in *Insight* Overview

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

Write Formulas in *Insight* Objectives

After completing this chapter, you will be able to:

- Describe scenarios when a user would write formulas in *Insight*
- Demonstrate how to edit formulas in *Insight*
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 report customization within three main situations:

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

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

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

Demonstration in *Insight*
Exercise 7.1

Refer to the Participant Guide to complete the following exercise:

• Exercise 7.1: Write a Formula
Write Formulas in *Insight*

Using the Edit Column Formula feature of *Insight*, users can manipulate data in a report by using mathematical operations to create new scenarios.

Select Edit Formula from the Edit icon’s drop-down menu.

Select the mathematical operations to manipulate data in the column from the Edit Column Formula window.

Apply formulas to the values within a column and customize the Column Heading from the Edit Column Formula window.
Write Formulas in *Insight* Review

**Write Formulas in *Insight* Accomplishments**

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

- Describe scenarios where a user would write formulas in *Insight*
- Demonstrate how to edit formulas in *Insight*
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Create Calculated Items
Create Calculated Items Overview
This chapter will review how to create calculated items in order to group a defined value set within a report.

Create Calculated Items 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
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.

Before

After
New “grouped” cell called Tri-State area appears in the report.
Create Calculated Items

Demonstration in *Insight*
Exercise 8.1

Refer to the Participant Guide to complete the following exercise:

- **Exercise 8.1**: Create a Calculated Item
Within *Insight*, users can create new calculated items to group values within a data element as a defined set.

Choose the values within a data element to group within a new calculated item.
Create Calculated Items Accomplishments

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
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Create Managerial Reports Using Action Links
Create Managerial Reports Using Action Links Overview
This chapter will review how users can build ad hoc managerial reports by creating action links that will drill-down to an operational report.

Create Managerial Reports Using Action Links Objectives
After completing this chapter, you will be able to:
• Describe scenarios when reports should use action links
• Demonstrate how to create an action link to an existing report
**When to Apply Action Links to Reports**

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

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<tr>
<th>When to Create a Managerial Report</th>
<th>No Need for a Managerial Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Report creator would like to have access to supporting detail on a subject, but does not need the detail as a main component of the report.</td>
<td>✗ Report creator uses two reports almost every day and would like access to both.</td>
</tr>
<tr>
<td>✓ Report creator would like to show the relationship between the data in two reports.</td>
<td>✗ Report creator finds one report to contain too many columns and would like to break it up into multiple reports.</td>
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Create Managerial Reports Using Action Links

Demonstration in *Insight*
Refer to the Participant Guide to complete the following exercise:

- **Exercise 9.1**: Use Action Links to Create an Ad Hoc Managerial Report
Apply Action Links to Reports

From the Criteria tab of the ad hoc report editing page, users can create action links that drill-down to an existing report in the Catalog.

Change the Value Primary Interaction to Action Link in order to enable drill-down action links in the report.

Click the New icon to create a new action link and navigate the Catalog to the desired drill-down report.

Choose whether the drill-down is a direct link or whether users will select the report from a menu.
Create Managerial Reports Using Links Accomplishments

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
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**Insight: Creating Reports and Dashboards Training Accomplishments**

Having completed this training, 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 action links within a report
Closing and Additional Resources

Questions
Are there any unanswered questions or concerns regarding today’s training?

Provide Feedback
Please fill out the training feedback form before you leave to allow for continuous improvement of the course.

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