

# ***Insight: Creating Reports and Dashboards***

# Agenda

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Course Summary

## ***Insight: Creating Reports and Dashboard Overview***

*Insight:* 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



Share your knowledge,  
experience and ideas



Feel free to ask  
questions



Use the “Parking Lot” to  
revisit discussion topics



Be respectful of other  
participants



Give helpful feedback



Keep us on schedule  
with timely returns from  
breaks



Turn off your cell phones  
and refrain from checking  
email

# Introductions

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**Please introduce yourself, providing the following information:**

- Name
- Organization or Agency
- Description of position
- Fun fact about yourself

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Course Summary

## **Apply Basic Edits to Common Reports**

# Apply Basic Edits to Common Reports Overview

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## 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

# Apply Basic Edits to Common Reports

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**Demonstration in *Insight***

# Exercise 2.1 and 2.2

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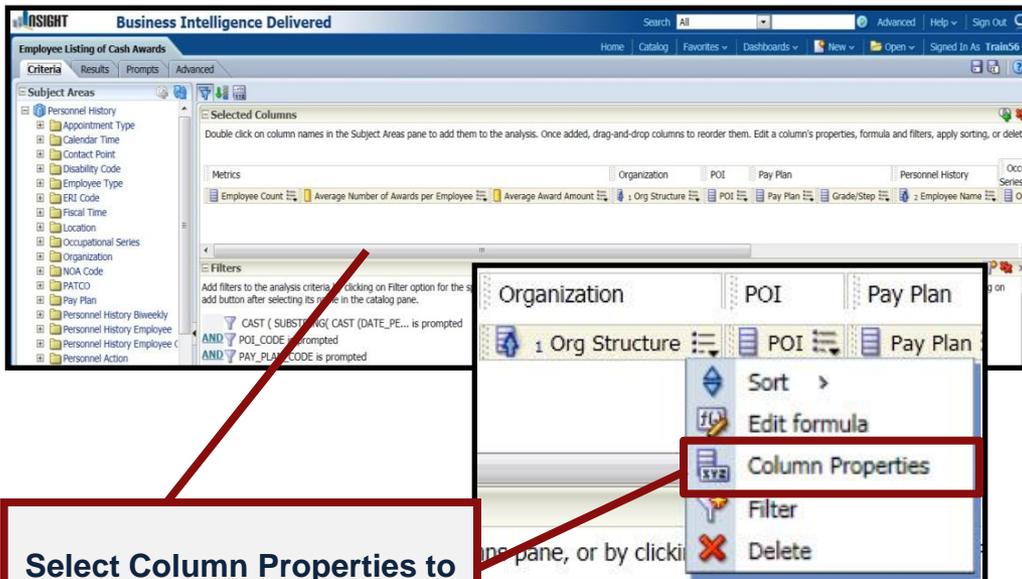
Refer to the Participant Guide to complete the following exercises:

- **Exercise 2.1:** Add Context to a Report
- **Exercise 2.2:** Sort Data in a Report



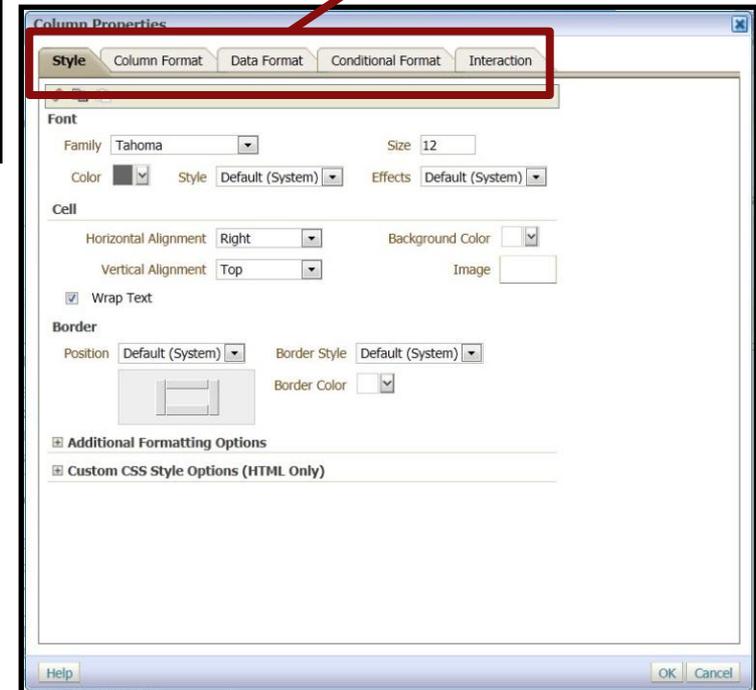
# Apply Custom Styles and Formatting

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



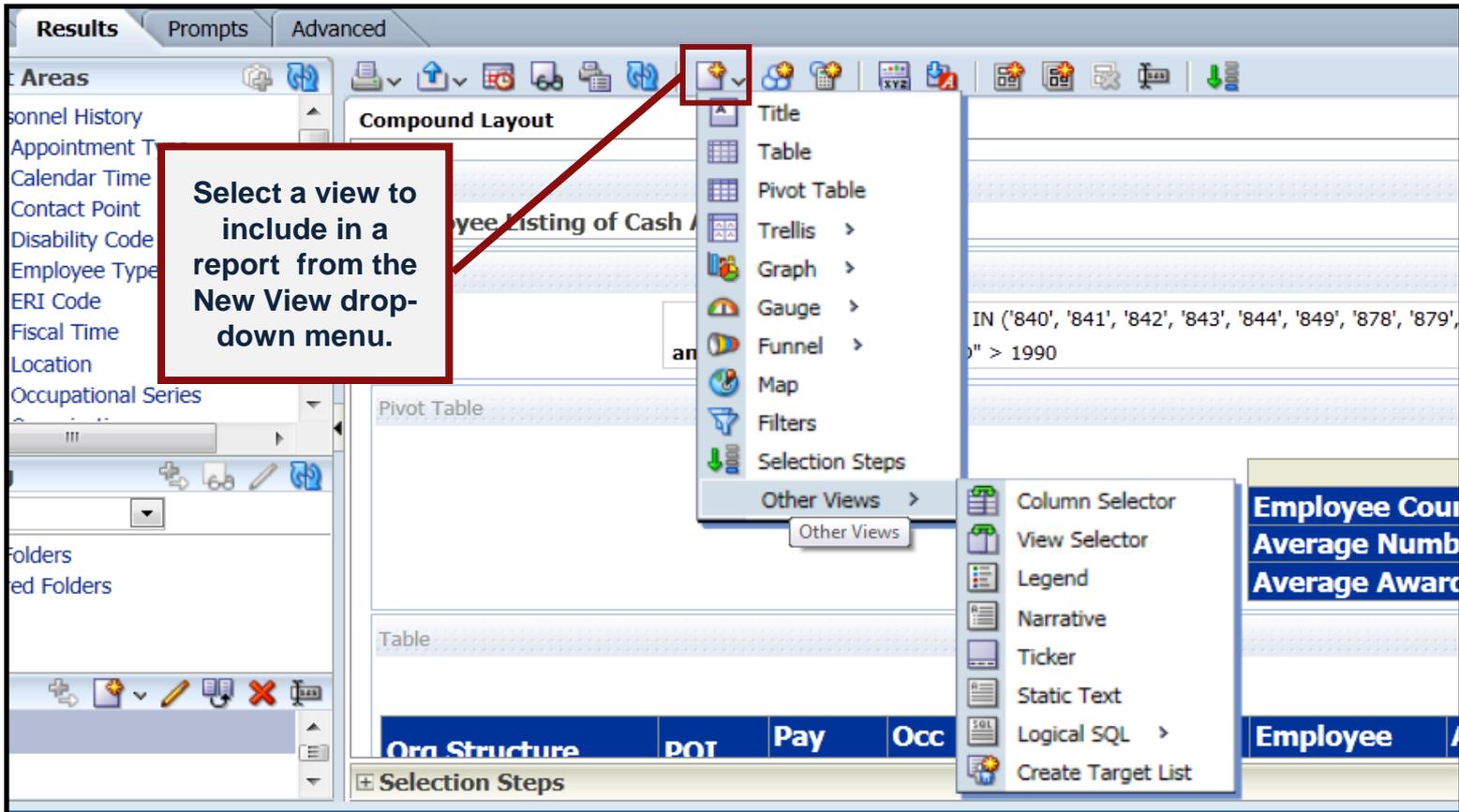
Select Column Properties to open the Column Properties window from the Properties drop-down menu.

Tabs in the Column Properties window provide users with styles and formatting editing options.



# Add Context To An Existing Report

Users can update reports with disclaimers or additional context in order to communicate information to the report audience.



The screenshot displays a report viewer interface with a toolbar at the top. A red box highlights the 'New View' icon (a document with a plus sign) in the toolbar. A red arrow points from this icon to a dropdown menu. A text box with a red border contains the instruction: "Select a view to include in a report from the New View drop-down menu." The dropdown menu lists various view types: Title, Table, Pivot Table, Trellis, Graph, Gauge, Funnel, Map, Filters, and Selection Steps. Below these, there are two 'Other Views' sub-menus. The first 'Other Views' menu lists: Column Selector, View Selector, Legend, Narrative, Ticker, Static Text, Logical SQL, and Create Target List. The second 'Other Views' menu lists: Employee Count, Average Number, Average Award, and Employee. The background shows a report titled 'Employee Listing of Cash' with columns for 'Org Structure', 'DOT', 'Pay', and 'Occ'.

# Apply Basic Edits to Common Reports Review

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## Apply Basic Edits to Common Reports Accomplishments

Having completed this chapter, you should now be able to 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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Course Summary

## **Create Ad Hoc Reports**

# Create Ad Hoc Reports Overview

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## 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

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**Demonstration in *Insight***

# Exercise 3.1, 3.2, and 3.3

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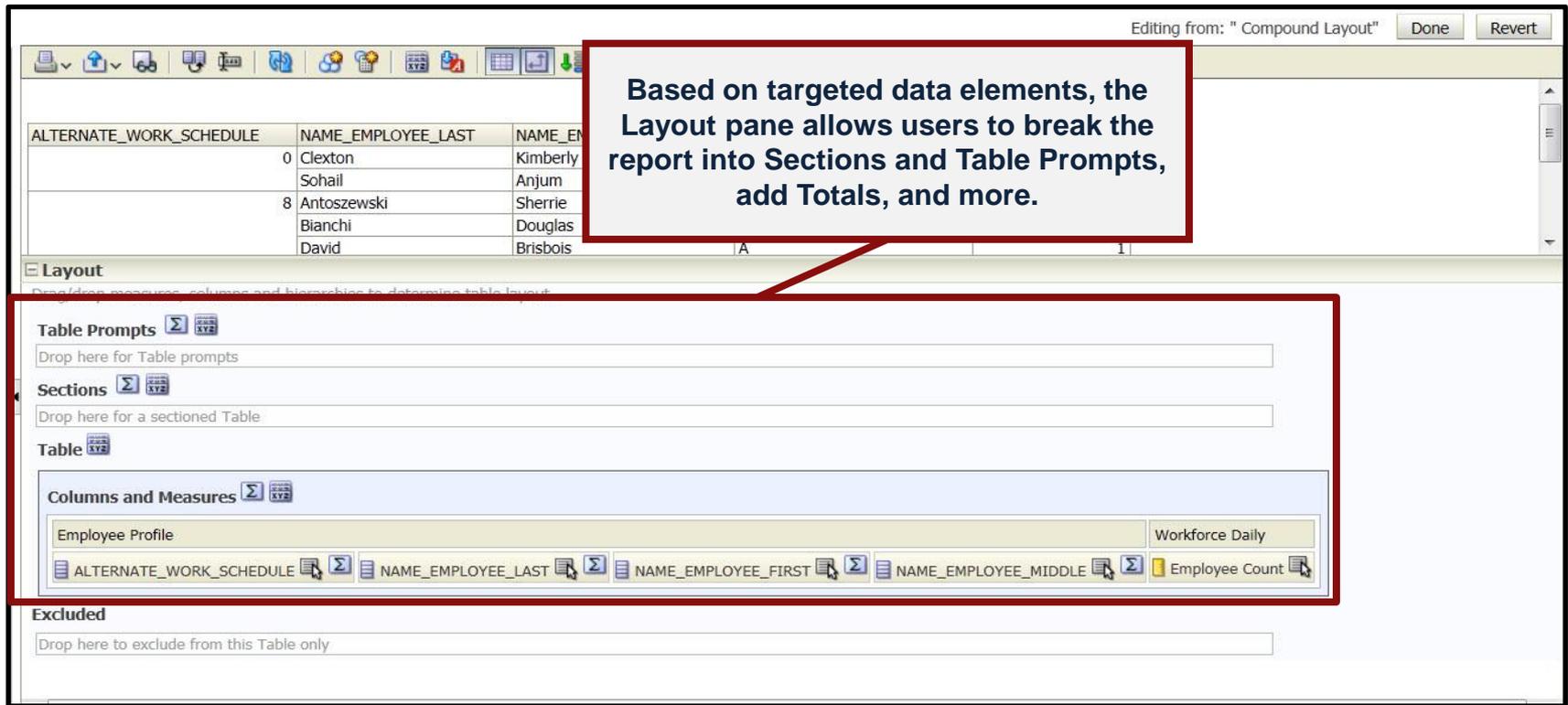
Refer to the Participant Guide to complete the following exercises:

- **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



# Customize Report Structure

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.



Editing from: "Compound Layout" Done Revert

ALTERNATE_WORK_SCHEDULE	NAME_EMPLOYEE_LAST	NAME_EMPLOYEE_FIRST	NAME_EMPLOYEE_MIDDLE	Employee Count
0	Clexton	Kimberly		
	Sohail	Anjum		
8	Antoszewski	Sherrie		
	Bianchi	Douglas		
	David	Brisbois		

**Layout**

Drag/drop measures, columns and hierarchies to determine table layout

**Table Prompts** 

Drop here for Table prompts

**Sections** 

Drop here for a sectioned Table

**Table** 

**Columns and Measures** 

Employee Profile Workforce Daily

 ALTERNATE\_WORK\_SCHEDULE  NAME\_EMPLOYEE\_LAST  NAME\_EMPLOYEE\_FIRST  NAME\_EMPLOYEE\_MIDDLE  Employee Count

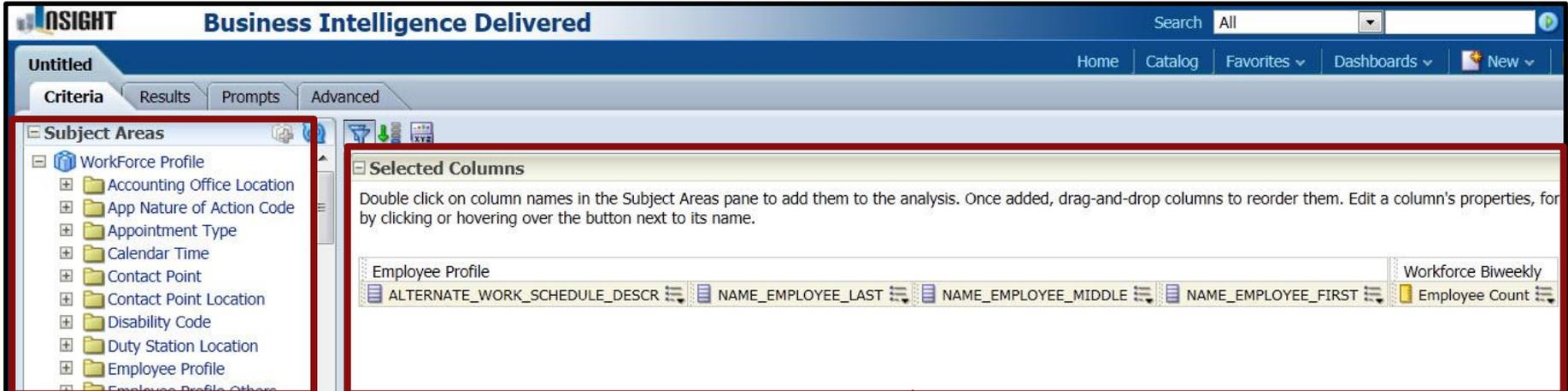
**Excluded**

Drop here to exclude from this Table only

**Based on targeted data elements, the Layout pane allows users to break the report into Sections and Table Prompts, add Totals, and more.**

# Create a New Ad Hoc Report

Using drag and drop capability, *Insight* ad hoc functionality enables users to quickly create custom reports with their organization's data.



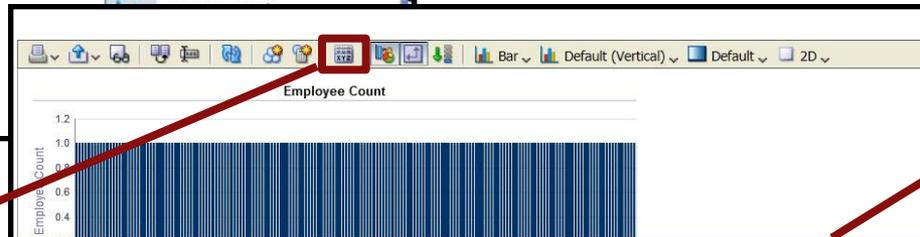
The screenshot shows the INSIGHT Business Intelligence interface. The top navigation bar includes "Home", "Catalog", "Favorites", "Dashboards", and "New". The main content area is divided into two panes. The left pane, titled "Subject Areas", lists various data categories such as "WorkForce Profile", "Accounting Office Location", "App Nature of Action Code", "Appointment Type", "Calendar Time", "Contact Point", "Contact Point Location", "Disability Code", "Duty Station Location", "Employee Profile", and "Employee Profile - Others". The right pane, titled "Selected Columns", contains a list of columns including "Employee Profile", "ALTERNATE\_WORK\_SCHEDULE\_DESCR", "NAME\_EMPLOYEE\_LAST", "NAME\_EMPLOYEE\_MIDDLE", "NAME\_EMPLOYEE\_FIRST", "Workforce Biweekly", and "Employee Count".

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.

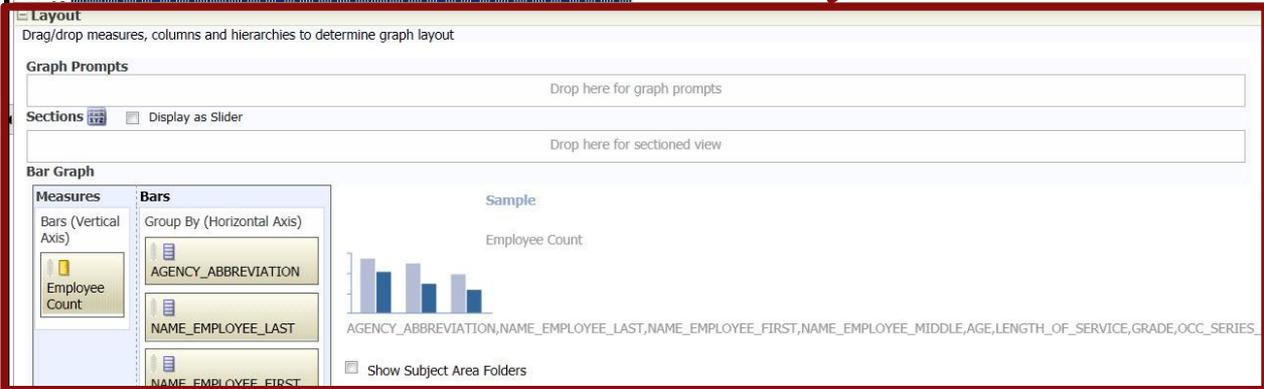
# Create New Graphs in a Report

*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.



A screenshot of the 'Layout' pane in the Insight software interface. The pane is titled 'Layout' and contains a 'Graph Prompts' section with a 'Drop here for graph prompts' field. Below this is a 'Sections' section with a 'Display as Slider' checkbox and a 'Drop here for sectioned view' field. The 'Bar Graph' section is expanded, showing 'Measures' and 'Bars' sub-sections. The 'Measures' section contains 'Employee Count'. The 'Bars' section contains 'Group By (Horizontal Axis)' with 'AGENCY\_ABBREVIATION', 'NAME\_EMPLOYEE\_LAST', and 'NAME\_EMPLOYEE\_FIRST' listed. A 'Sample' bar chart is displayed on the right, showing a bar chart with the y-axis labeled 'Employee Count' and the x-axis labeled 'AGENCY\_ABBREVIATION, NAME\_EMPLOYEE\_LAST, NAME\_EMPLOYEE\_FIRST, NAME\_EMPLOYEE\_MIDDLE, AGE, LENGTH\_OF\_SERVICE, GRADE, OCC\_SERIES...'. A 'Show Subject Area Folders' checkbox is also visible.

# Create Ad Hoc Reports Review

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## Create Ad Hoc Reports Accomplishments

Having completed this chapter, you should now be able to 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

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## 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

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**Demonstration in *Insight***

# Exercise 4.1 and 4.2

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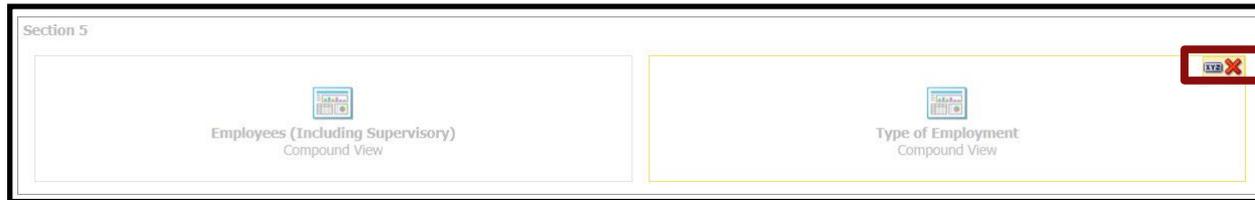
Refer to the Participant Guide to complete the following exercises:

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



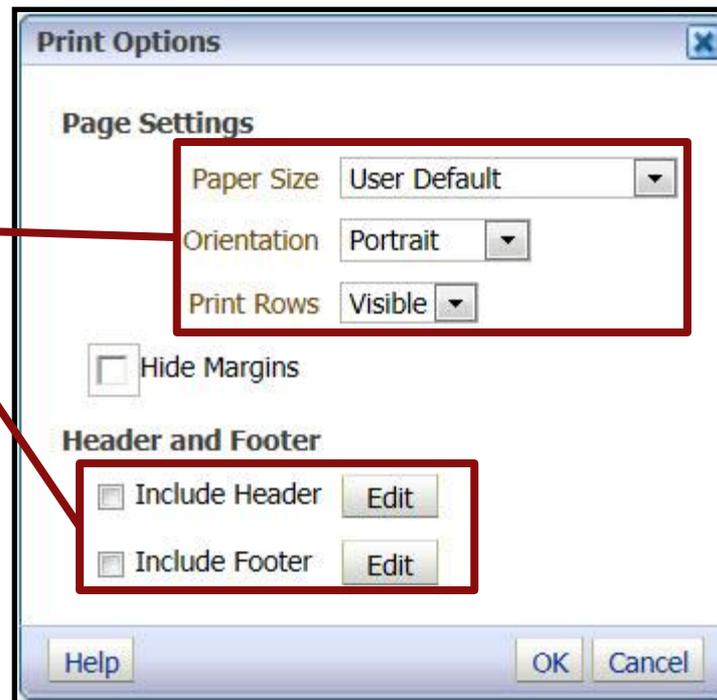
# Customize Common Dashboards

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



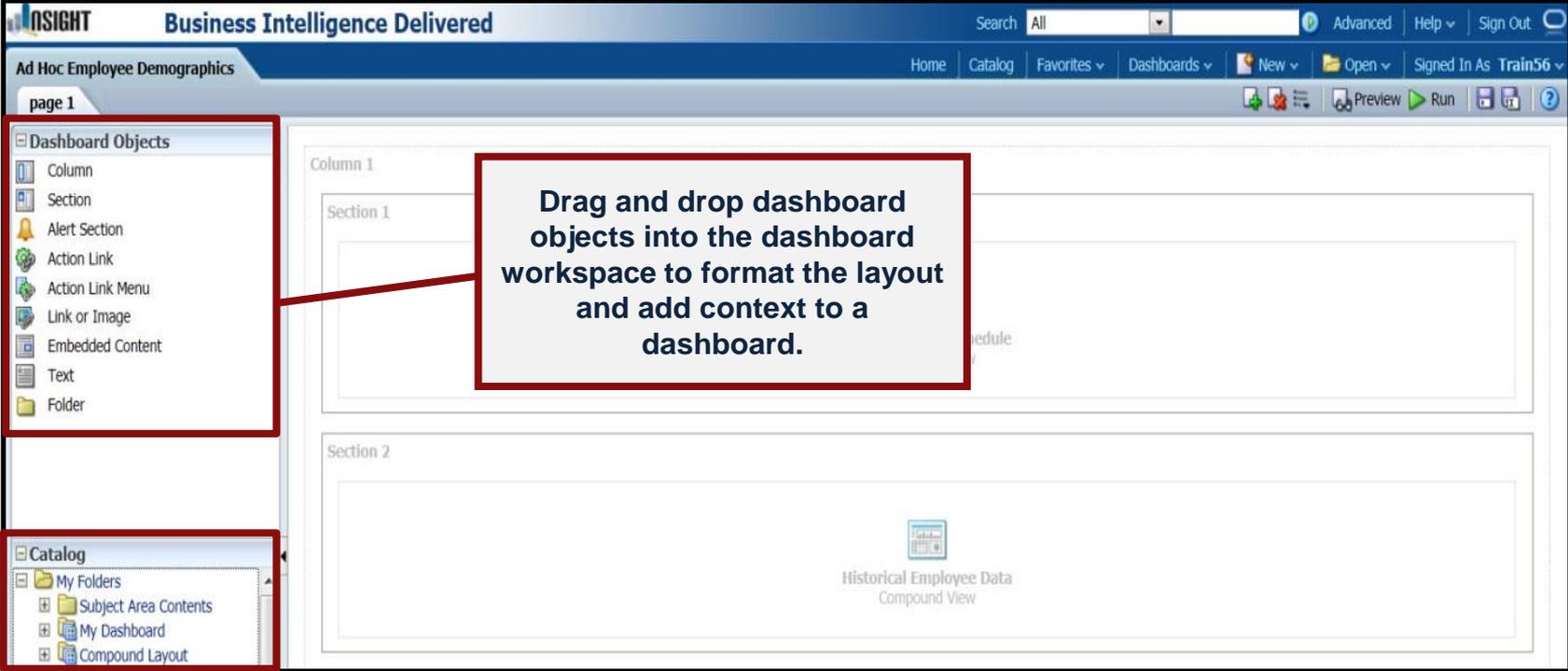
Remove a component of a common dashboard by clicking the Delete icon.

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

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## Customize and Create Ad Hoc Dashboards Accomplishments

Having completed this chapter, you should now be able to 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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Course Summary

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## **Create Filters and Prompts**

# Create Filters and Prompts Overview

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## 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

# 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 way each time or can change.
- If the mechanism is a visible element of a report or a dashboard.

## Filter

- 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

## Report Prompt

- 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 Prompt

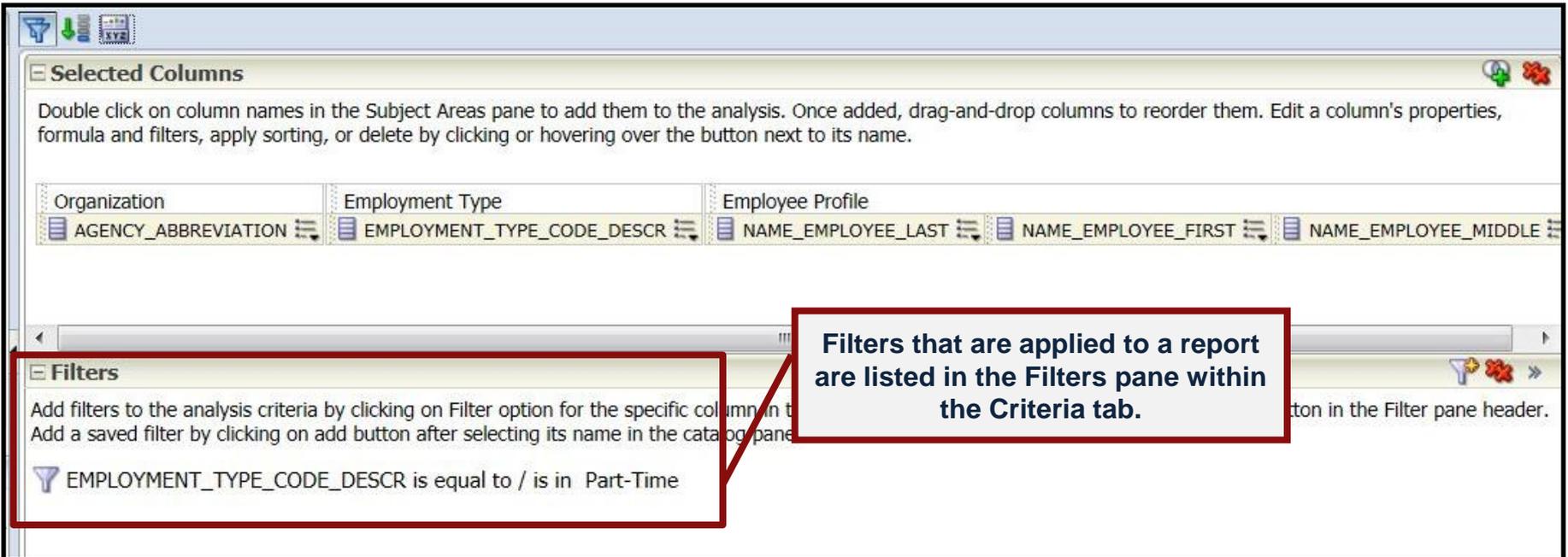
- Enables users to select data restrictions **after the report runs**
- May change each time the report runs
- **Visible element of a table** that appears directly above the report table in the run view

## Dashboard Prompt

- 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.



**Selected Columns**

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name.

Organization	Employment Type	Employee Profile		
AGENCY_ABBREVIATION	EMPLOYMENT_TYPE_CODE_DESCR	NAME_EMPLOYEE_LAST	NAME_EMPLOYEE_FIRST	NAME_EMPLOYEE_MIDDLE

**Filters**

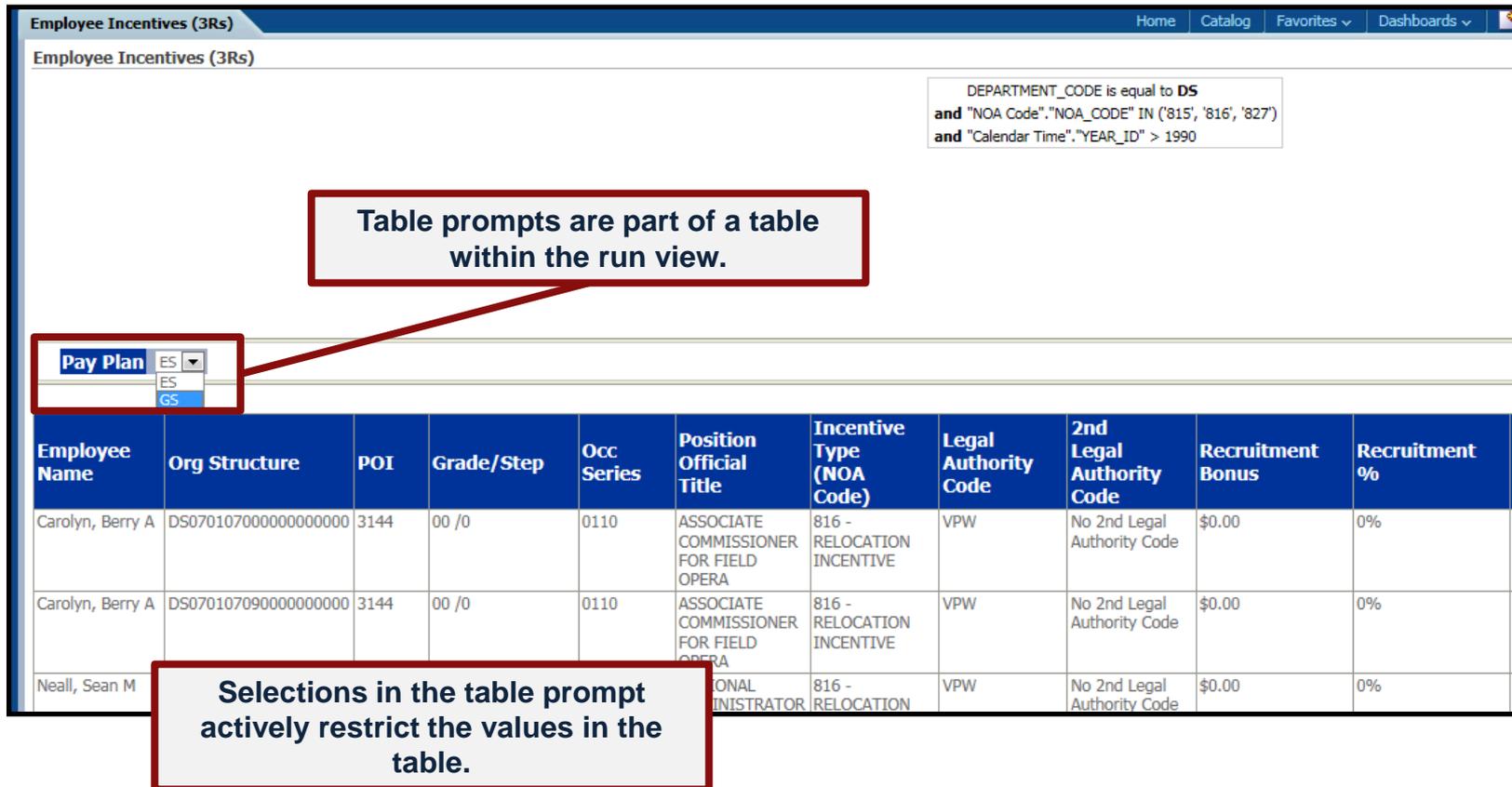
Add filters to the analysis criteria by clicking on Filter option for the specific column in the Subject Areas pane. Add a saved filter by clicking on add button after selecting its name in the catalog pane.

EMPLOYMENT\_TYPE\_CODE\_DESCR is equal to / is in Part-Time

**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.



Employee Incentives (3Rs)

DEPARTMENT\_CODE is equal to DS  
and "NOA Code"."NOA\_CODE" IN ('815', '816', '827')  
and "Calendar Time"."YEAR\_ID" > 1990

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

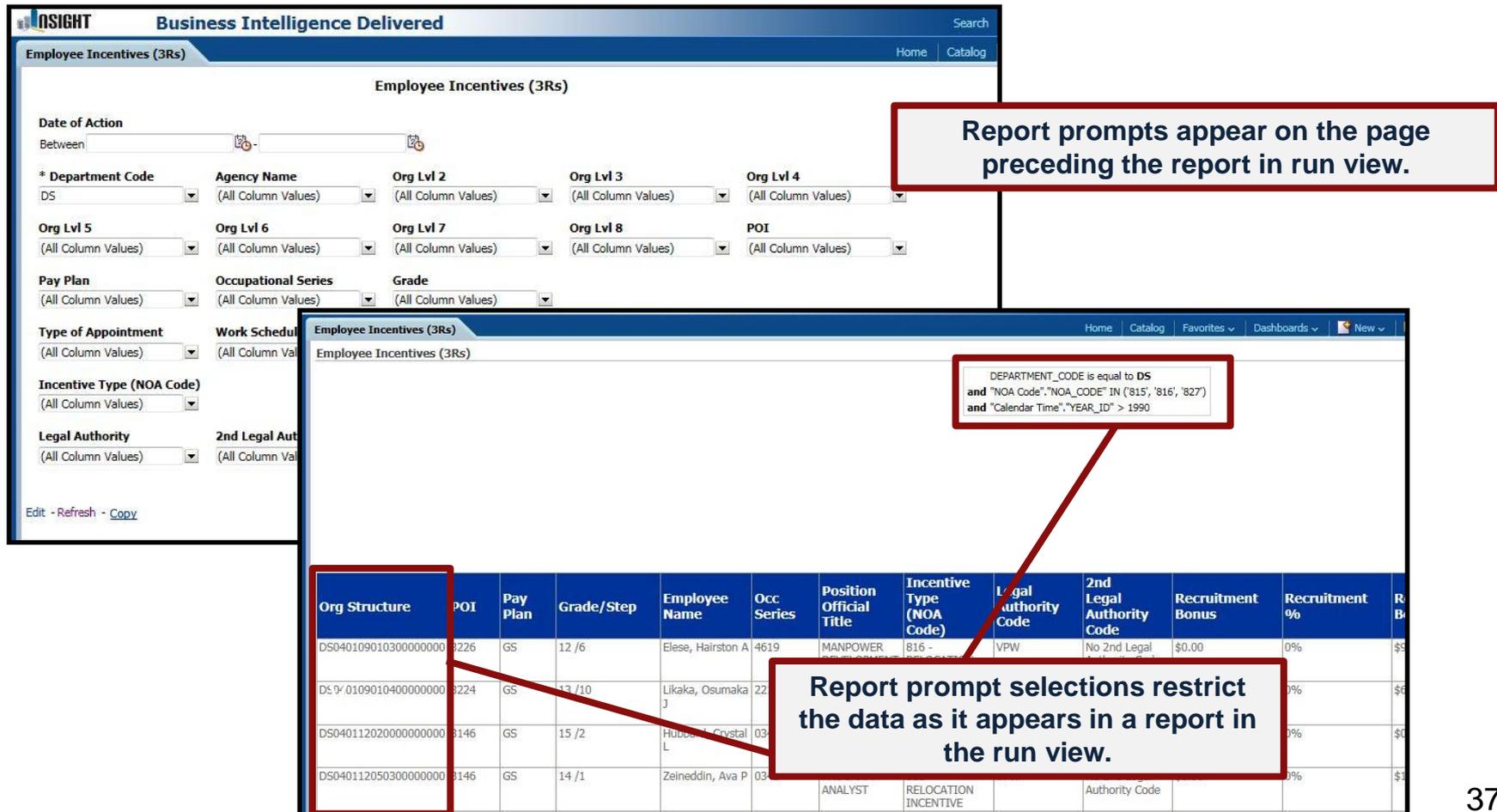
Pay Plan ES  
ES  
GS

Employee Name	Org Structure	POI	Grade/Step	Occ Series	Position Official Title	Incentive Type (NOA Code)	Legal Authority Code	2nd Legal Authority Code	Recruitment Bonus	Recruitment %
Carolyn, Berry A	DS070107000000000000	3144	00 /0	0110	ASSOCIATE COMMISSIONER FOR FIELD OPERA	816 - RELOCATION INCENTIVE	VPW	No 2nd Legal Authority Code	\$0.00	0%
Carolyn, Berry A	DS070107090000000000	3144	00 /0	0110	ASSOCIATE COMMISSIONER FOR FIELD OPERA	816 - RELOCATION INCENTIVE	VPW	No 2nd Legal Authority Code	\$0.00	0%
Neall, Sean M					ONAL ADMINISTRATOR	816 - RELOCATION	VPW	No 2nd Legal Authority Code	\$0.00	0%

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.**

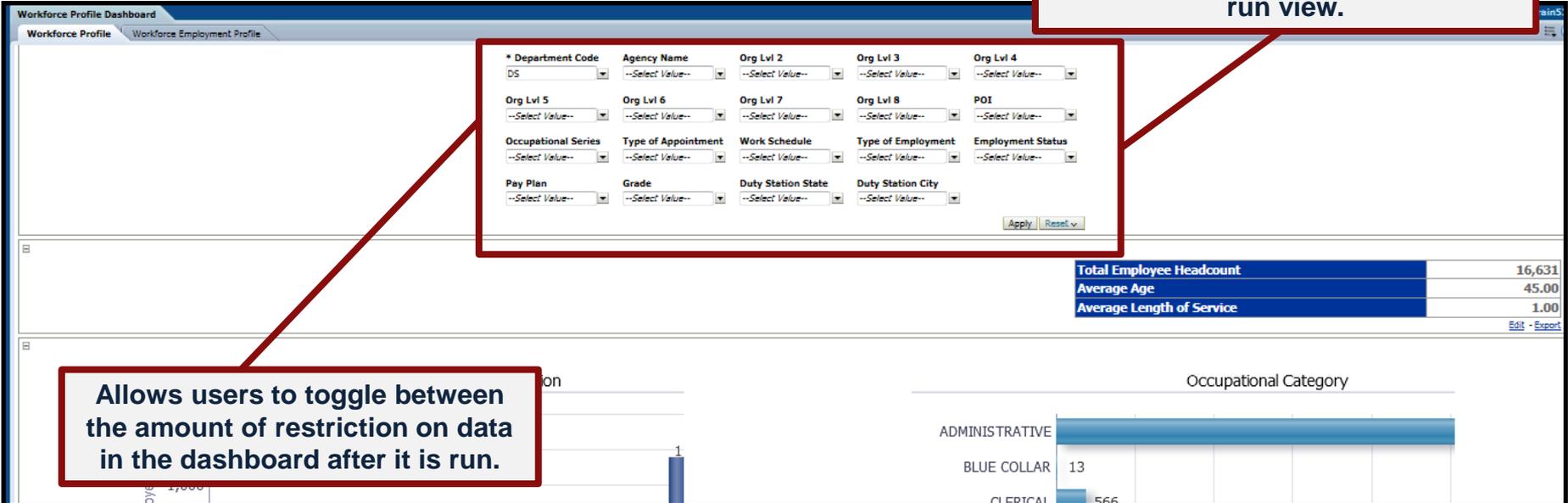
**DEPARTMENT\_CODE is equal to DS and "NOA Code". "NOA\_CODE" IN ('815', '816', '827') and "Calendar Time". "YEAR\_ID" > 1990**

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 %	R B
DS040109010300000000	8226	GS	12 /6	Elese, Hairston A	4619	MANPOWER	816 -	VPW	No 2nd Legal	\$0.00	0%	\$5
DS 9 0109010400000000	8224	GS	13 /10	Likaka, Osumaka J	22						0%	\$6
DS040112020000000000	8146	GS	15 /2	Hubbard, Crystal L	03						0%	\$0
DS040112050300000000	8146	GS	14 /1	Zeineddin, Ava P	03	ANALYST	RELOCATION INCENTIVE		Authority Code		0%	\$1

**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.



The screenshot displays the 'Workforce Profile Dashboard' with a 'Workforce Employment Profile' tab. A central panel contains various filter prompts, each with a dropdown menu. A red box highlights this filter panel. Below the filters, a summary table shows key metrics. At the bottom, a bar chart displays data for 'Occupational Category'.

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

Filter Category	Filter Name	Value
Department	* Department Code	DS
Agency	Agency Name	--Select Value--
Org Lvl 2	Org Lvl 2	--Select Value--
Org Lvl 3	Org Lvl 3	--Select Value--
Org Lvl 4	Org Lvl 4	--Select Value--
Org Lvl 5	Org Lvl 5	--Select Value--
Org Lvl 6	Org Lvl 6	--Select Value--
Org Lvl 7	Org Lvl 7	--Select Value--
Org Lvl 8	Org Lvl 8	--Select Value--
POI	POI	--Select Value--
Occupational Series	Occupational Series	--Select Value--
Type of Appointment	Type of Appointment	--Select Value--
Work Schedule	Work Schedule	--Select Value--
Type of Employment	Type of Employment	--Select Value--
Employment Status	Employment Status	--Select Value--
Pay Plan	Pay Plan	--Select Value--
Grade	Grade	--Select Value--
Duty Station State	Duty Station State	--Select Value--
Duty Station City	Duty Station City	--Select Value--

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

Metric	Value
Total Employee Headcount	16,631
Average Age	45.00
Average Length of Service	1.00

Occupational Category	Count
ADMINISTRATIVE	1
BLUE COLLAR	13
CLERICAL	566

# Create Filters and Prompts

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**Demonstration in *Insight***

# Exercise 5.1, 5.2, and 5.3

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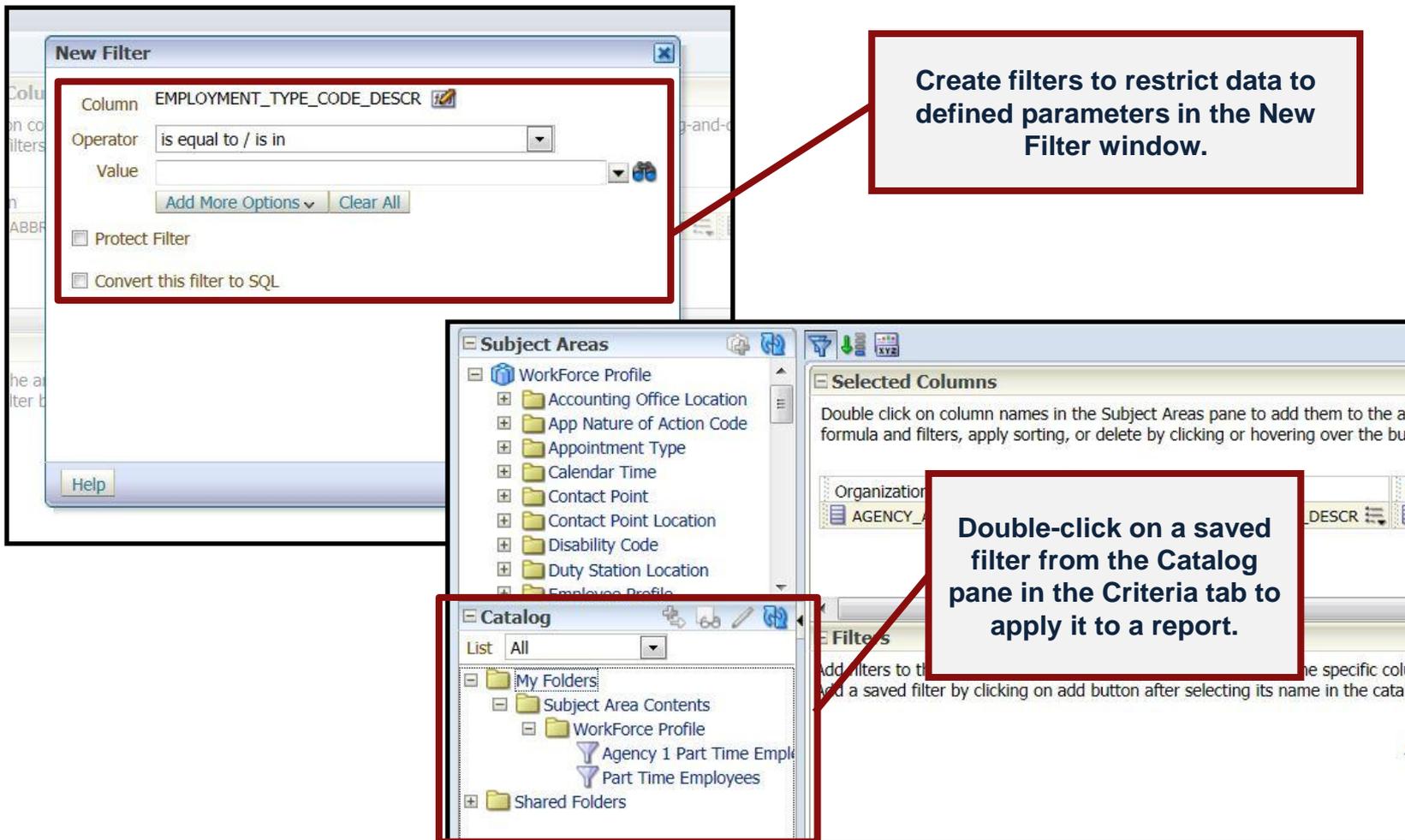
Refer to the Participant Guide to complete the following exercises:

- **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



# 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.

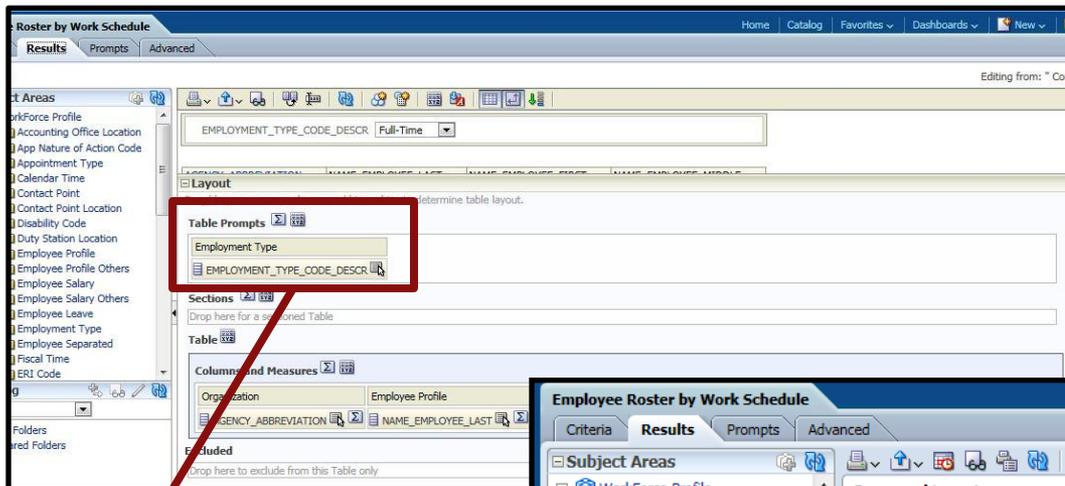


The image shows two screenshots from a report builder application. The top screenshot is a 'New Filter' dialog box with a red border. It contains the following fields: 'Column' set to 'EMPLOYMENT\_TYPE\_CODE\_DESCR', 'Operator' set to 'is equal to / is in', and an empty 'Value' field. Below these fields are 'Add More Options' and 'Clear All' buttons. At the bottom, there are two checkboxes: 'Protect Filter' and 'Convert this filter to SQL'. A red callout box with a white background and black text points to this dialog, containing the text: 'Create filters to restrict data to defined parameters in the New Filter window.'

The bottom screenshot shows the 'Criteria' tab of a report builder. It features a 'Subject Areas' pane on the left with a tree view of categories like 'WorkForce Profile', 'Accounting Office Location', etc. Below it is a 'Catalog' pane with a tree view showing 'My Folders', 'Subject Area Contents', and 'WorkForce Profile'. A red callout box with a white background and black text points to the 'Catalog' pane, containing the text: 'Double-click on a saved filter from the Catalog pane in the Criteria tab to apply it to a report.'

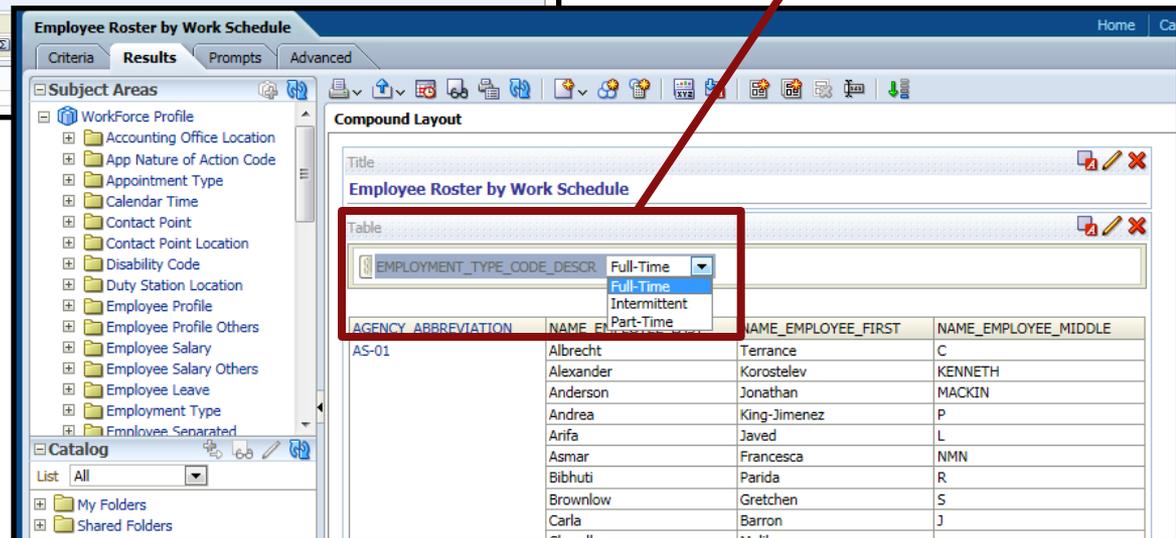
# Create a Table Prompt

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



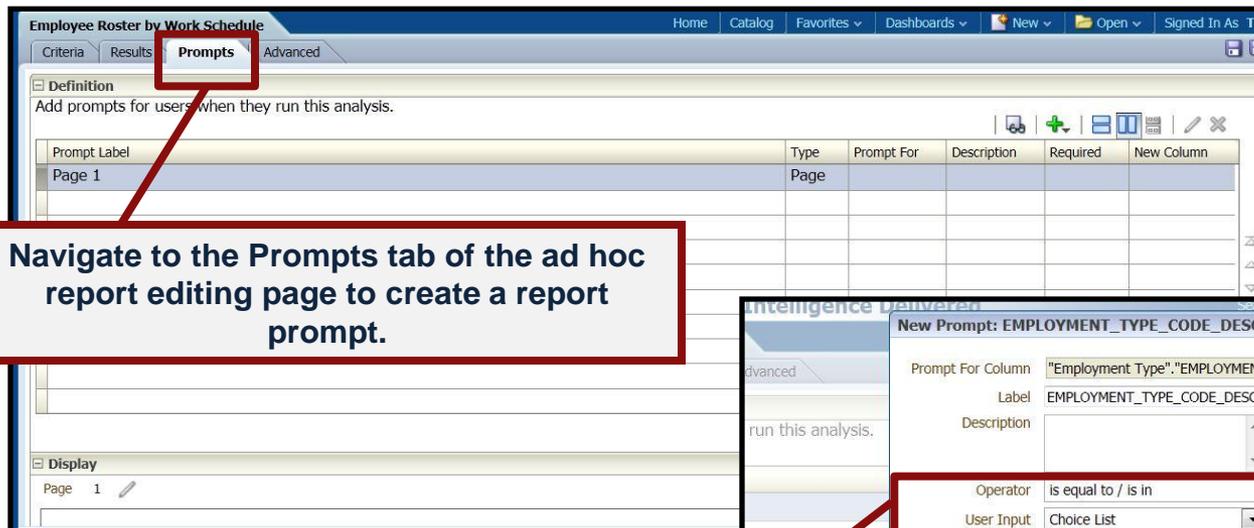
Drag and drop data elements into Table Prompts within the Layout pane.

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



# Create a Report Prompt

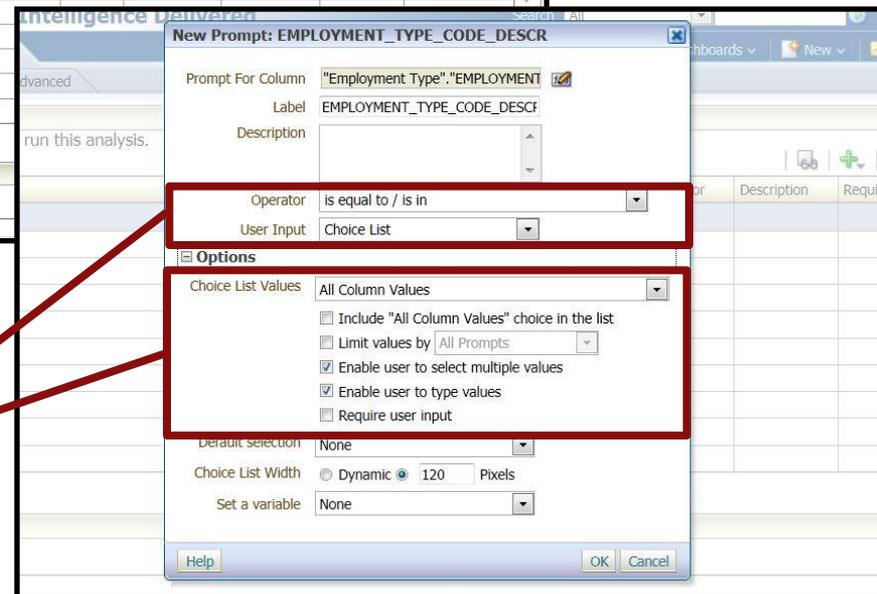
Report prompts appear on a page preceding the report in run view and allow users to customize restrictions on a report each time the report runs.



The screenshot shows the 'Employee Roster by Work Schedule' report editing page. The 'Prompts' tab is selected, and a table is visible with columns: Prompt Label, Type, Prompt For, Description, Required, and New Column. The first row contains 'Page 1' under 'Prompt Label' and 'Page' under 'Type'. A red box highlights the 'Prompts' tab, and a red arrow points from it to a callout box.

Prompt Label	Type	Prompt For	Description	Required	New Column
Page 1	Page				

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

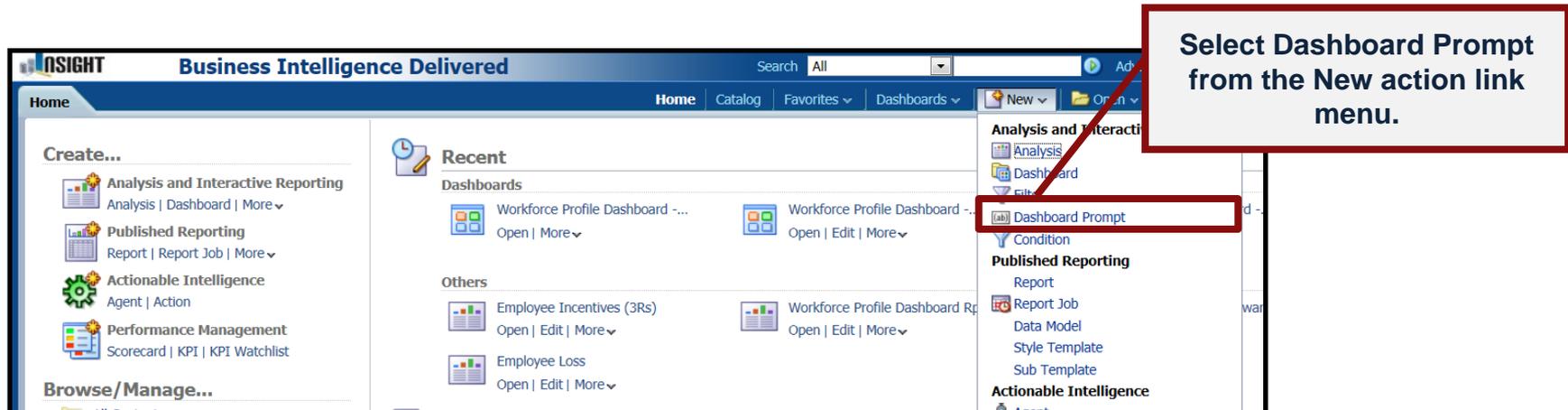


The screenshot shows the 'New Prompt: EMPLOYMENT\_TYPE\_CODE\_DESCR' dialog box. The 'Prompt For Column' is set to '"Employment Type"."EMPLOYMENT"', the 'Label' is 'EMPLOYMENT\_TYPE\_CODE\_DESCR', and the 'Description' is empty. The 'Operator' is 'Is equal to / is in' and the 'User Input' is 'Choice List'. The 'Options' section includes 'Choice List Values' set to 'All Column Values', 'Include "All Column Values" choice in the list' (unchecked), 'Limit values by' set to 'All Prompts', 'Enable user to select multiple values' (checked), 'Enable user to type values' (checked), and 'Require user input' (unchecked). The 'Default selection' is 'None', 'Choice List Width' is 'Dynamic' with a value of '120' pixels, and 'Set a variable' is 'None'. A red box highlights the 'Operator' and 'User Input' fields, and another red box highlights the 'Options' section. Red arrows point from these boxes to callout boxes.

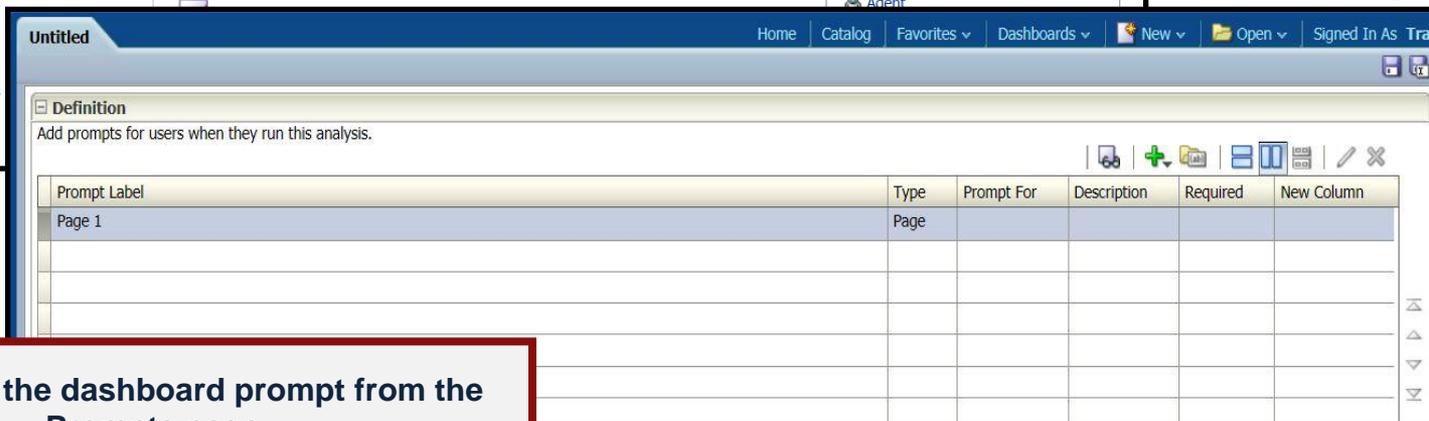
Customize the type of restriction, input, and other characteristics of the report.

# 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.**

Prompt Label	Type	Prompt For	Description	Required	New Column
Page 1	Page				

# Create Filters and Prompts Review

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## Create Filters and Prompts Accomplishments

Having completed this chapter, you should now be able to 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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Course Summary

# Create Tables and Pivot Tables

# Create Tables and Pivot Tables Overview

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## 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*.

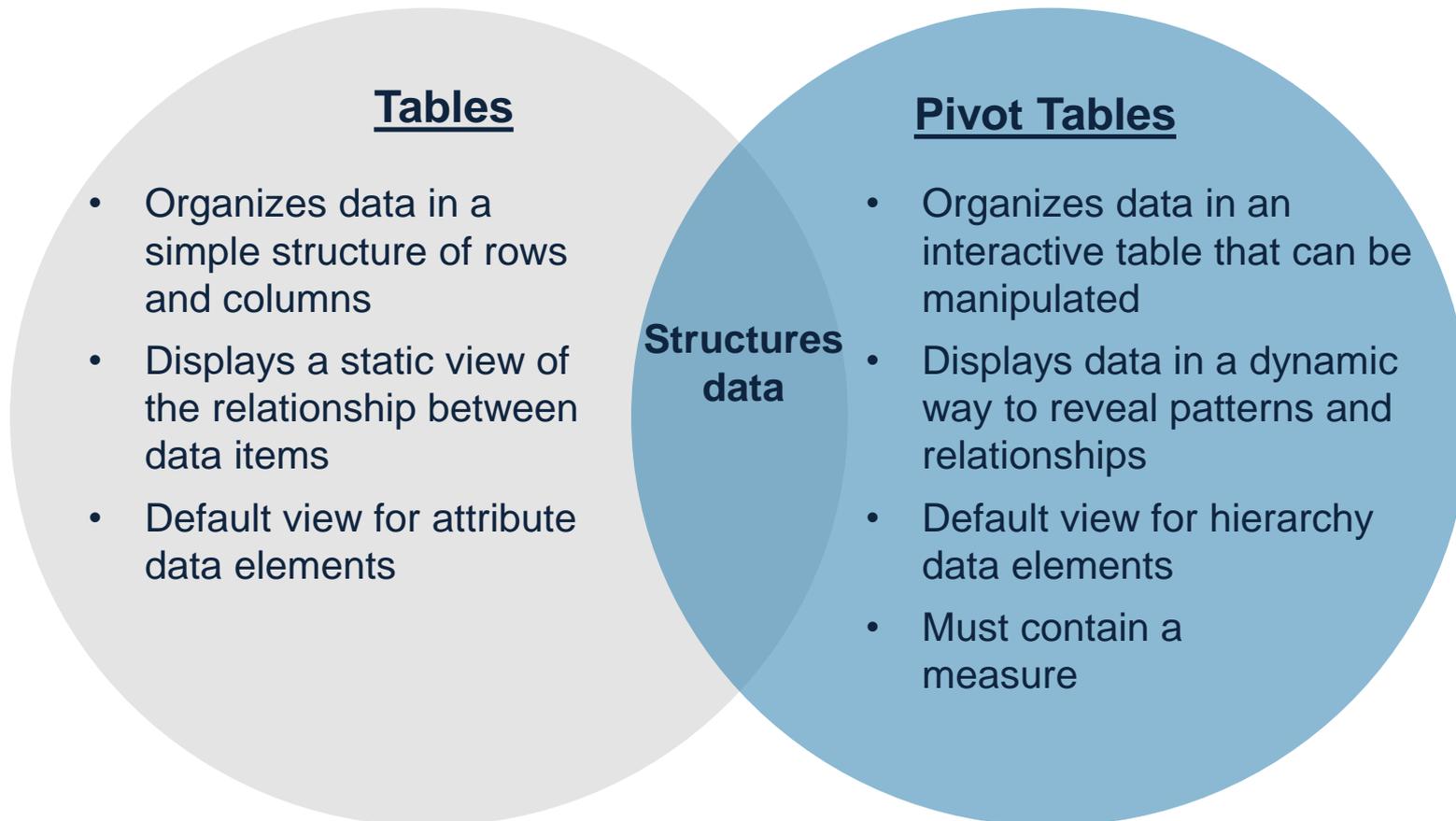
## Create Tables and Pivot Tables Objectives

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.



# Create Tables and Pivot Tables

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**Demonstration in *Insight***

# Exercise 6.1

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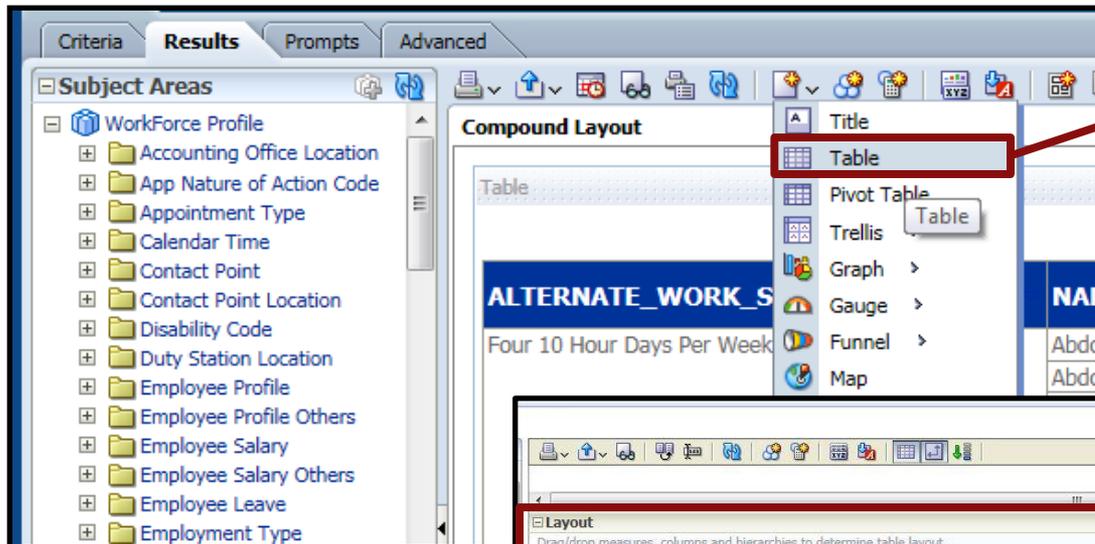
Refer to the Participant Guide to complete the following exercise:

- **Exercise 6.1:** Create a Pivot Table



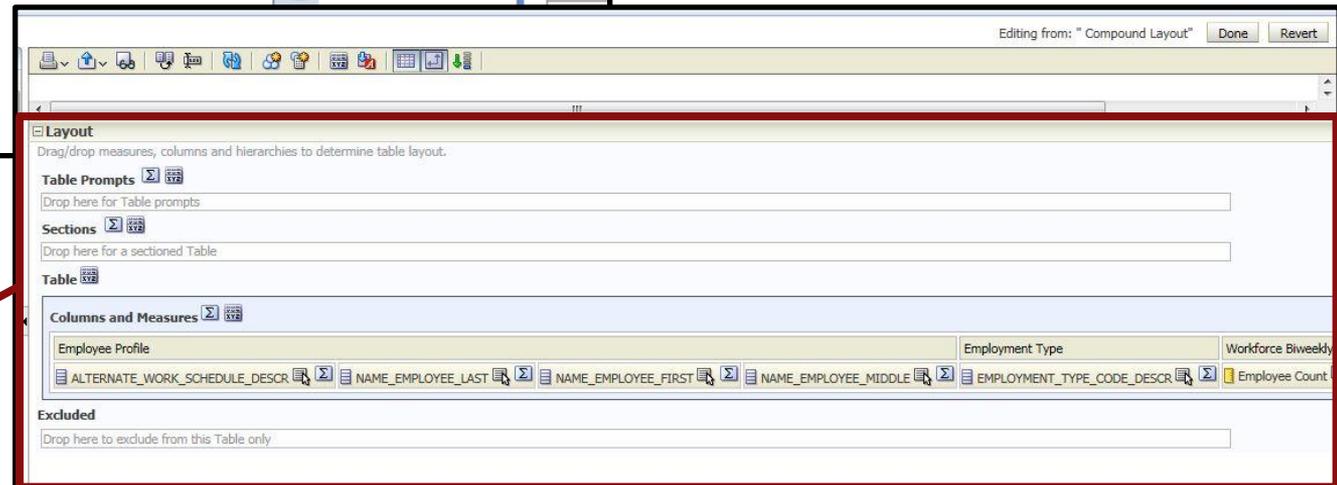
# Create a Table Within a Report

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



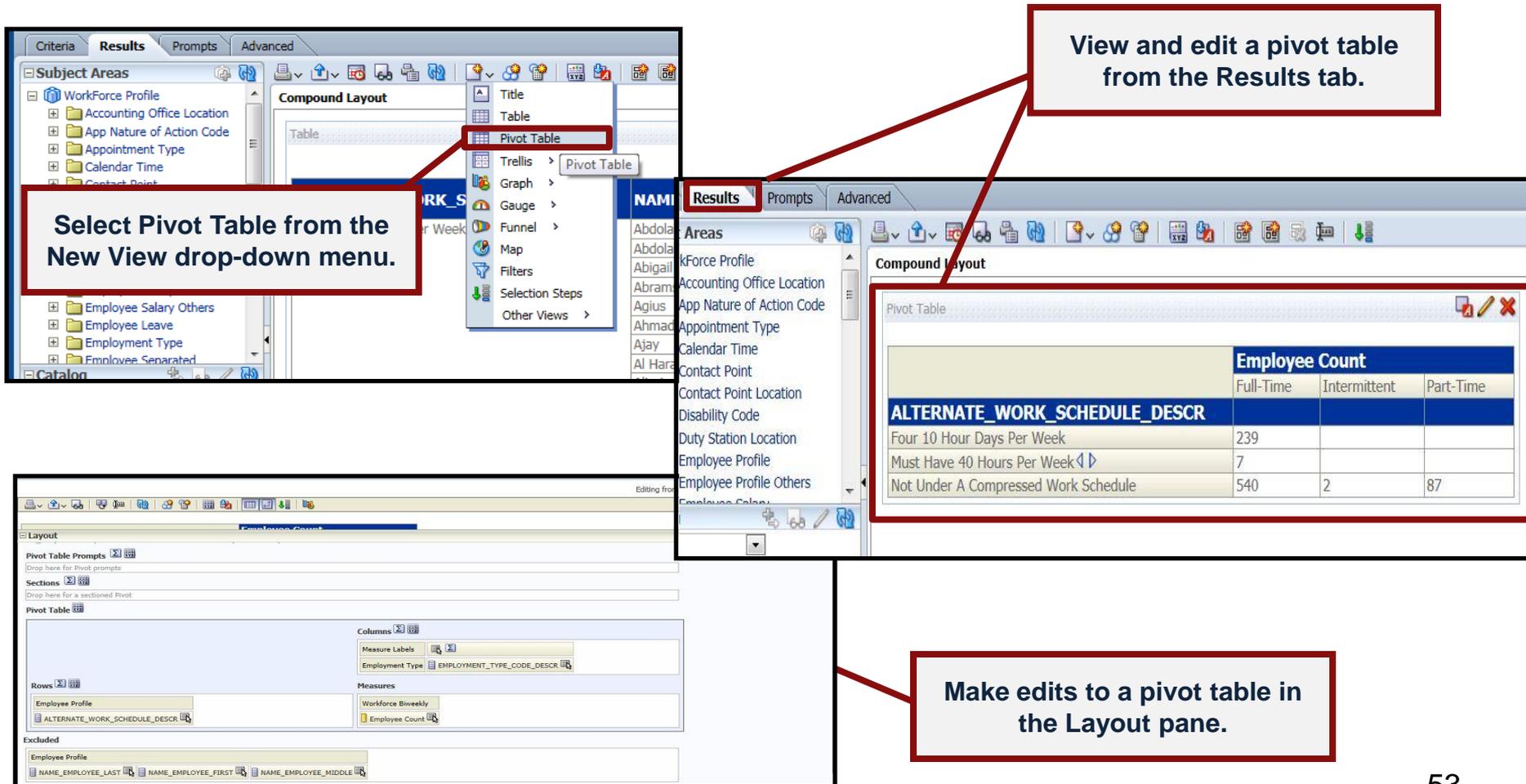
Select Table from New View drop-down menu to add a table to a report.

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.**

	Employee Count		
	Full-Time	Intermittent	Part-Time
ALTERNATE_WORK_SCHEDULE_DESCR			
Four 10 Hour Days Per Week	239		
Must Have 40 Hours Per Week	7		
Not Under A Compressed Work Schedule	540	2	87

**Make edits to a pivot table in the Layout pane.**

# Create Tables and Pivot Tables Review

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## 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

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## 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

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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*

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**Demonstration in *Insight***

# Exercise 7.1

---

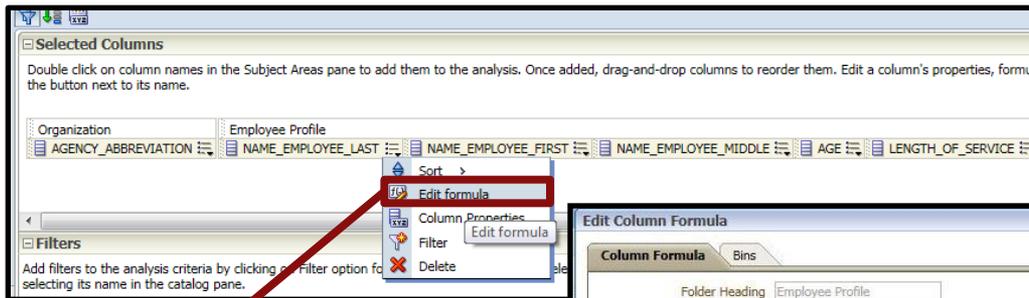
Refer to the Participant Guide to complete the following exercise:

- **Exercise 7.1:** Write a Formula



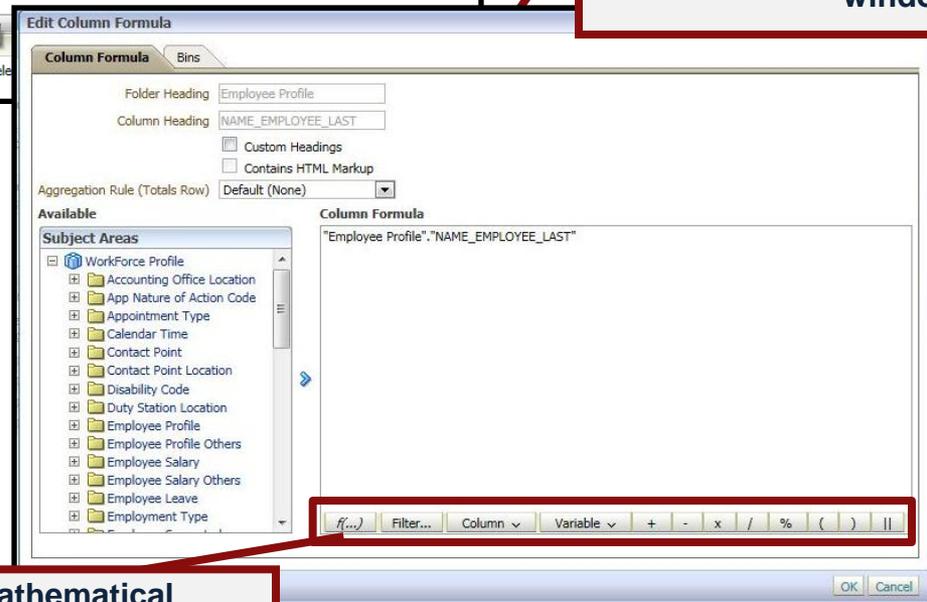
# Write Formulas in *Insight*

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



Apply formulas to the values within a column and customize the Column Heading from the Edit Column Formula window.

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.

# Write Formulas in *Insight* Review

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## 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

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## 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

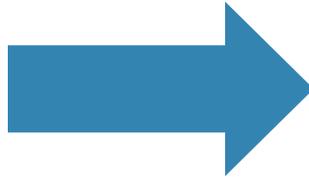
# When to Create a New Calculated Item

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

Values for New York, New Jersey, and Connecticut appear in individual cells in the report.



## After

New “grouped” cell called Tri-State area appears in the report.

# Create Calculated Items

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**Demonstration in *Insight***

# Exercise 8.1

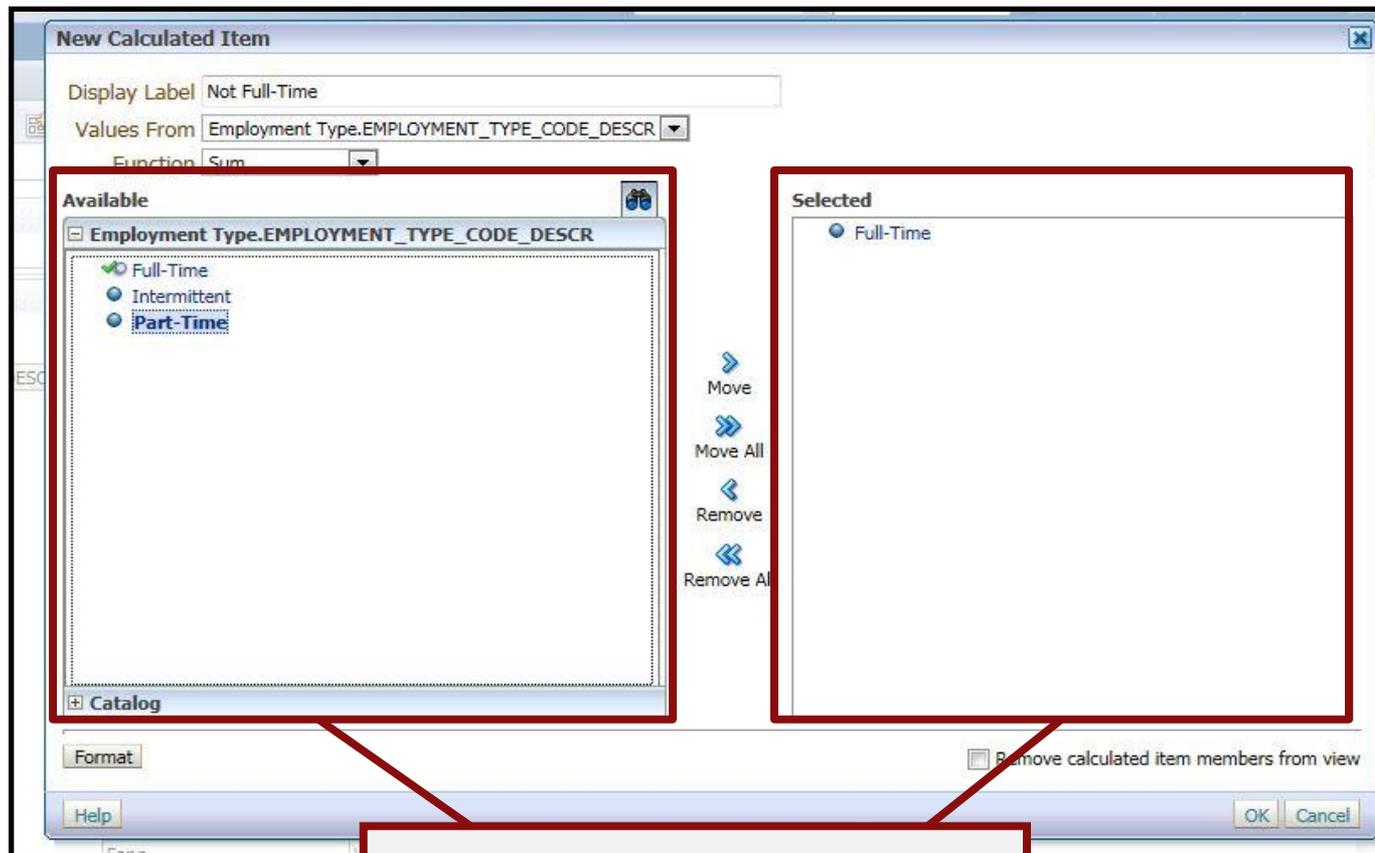
Refer to the Participant Guide to complete the following exercise:

- **Exercise 8.1:** Create a Calculated Item



# Create a Calculated Item

Within *Insight*, users can create new calculated items to group values within a data element as a defined set.



# Create Calculated Items Review

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## 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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Course Summary

## **Create Managerial Reports Using Action Links**

# Create Managerial Reports Using Action Links Overview

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## 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.

## When to Create a Managerial Report

- ✓ 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.
- ✓ Report creator would like to show the relationship between the data in two reports.

## No Need for a Managerial Report

- × Report creator uses two reports almost every day and would like access to both.
- × Report creator finds one report to contain too many columns and would like to break it up into multiple reports.

# Create Managerial Reports Using Action Links

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**Demonstration in *Insight***

# Exercise 9.1

Refer to the Participant Guide to complete the following exercise:

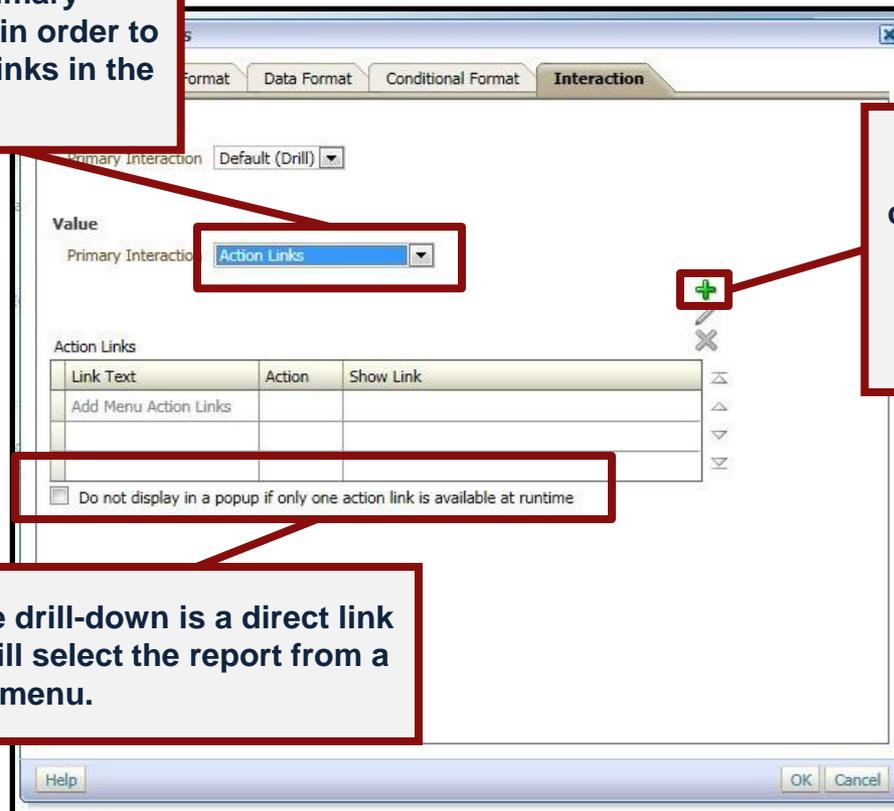
- **Exercise 9.1:** Use Action Links to Create an Ad Hoc Managerial Report



# 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.



Primary Interaction: Default (Drill) ▼

Value  
Primary Interaction: Action Links ▼

Link Text	Action	Show Link
Add Menu Action Links		

Do not display in a popup if only one action link is available at runtime

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 Review

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## 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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# Course Summary

## ***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

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## 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](http://www.nfc.usda.gov/insight)