



# National Finance Center

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U. S. Department of Agriculture

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

## National Finance Center

### *Insight: Using Reports and Dashboards* *Participant Guide*

*June 2013*



U. S. Department of Agriculture  
NEW ORLEANS, LA

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## 1.0. Training Information

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### 1.1. Agenda

This course will include the following chapters:

Chapter
2.0 <i>Insight</i> Overview
3.0 Understanding Data in <i>Insight</i>
4.0 Understanding Reports and Dashboards in <i>Insight</i>
5.0 Basic Navigation
6.0 Access Reports
7.0 Access Dashboards

### 1.2. Purpose

*Insight*. Using Reports and Dashboards provides an overview of *Insight*, the National Finance Center's business intelligence solution that provides integrated data and flexible analytics to drive strategic business decisions.

### 1.3. Training Objectives

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

- Describe the purpose of *Insight* as a reporting and analytics solution
- Describe how data, reports, and dashboards are structured in *Insight*
- Identify key features of *Insight's* basic navigation
- Demonstrate how to access, run, and export reports and dashboards

#### 1.4. Course Materials and Resources

Participants will be provided with the following course materials to assist their learning:

- *Insight*: Using 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><b>IMPORTANT:</b> Provides information essential to the completion of a task.</p>
	<p><b>TIP:</b> Helps users apply the techniques and procedures described in the text. A tip suggests alternative methods that may not be obvious and helps users understand the benefits and capabilities of the system.</p>

**Notes:**

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## 2.0. *Insight* Overview

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### 2.1. Chapter Overview

This chapter will review the purpose of *Insight* and how *Insight* provides users with advanced reporting and business intelligence capabilities.

#### *Chapter Objectives*

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

- Describe *Insight* and the value it provides for strategic reporting and decision making
- Identify the data sources available within *Insight*
- Describe *Insight* security and access

### 2.2. *Insight* Overview: Exercise

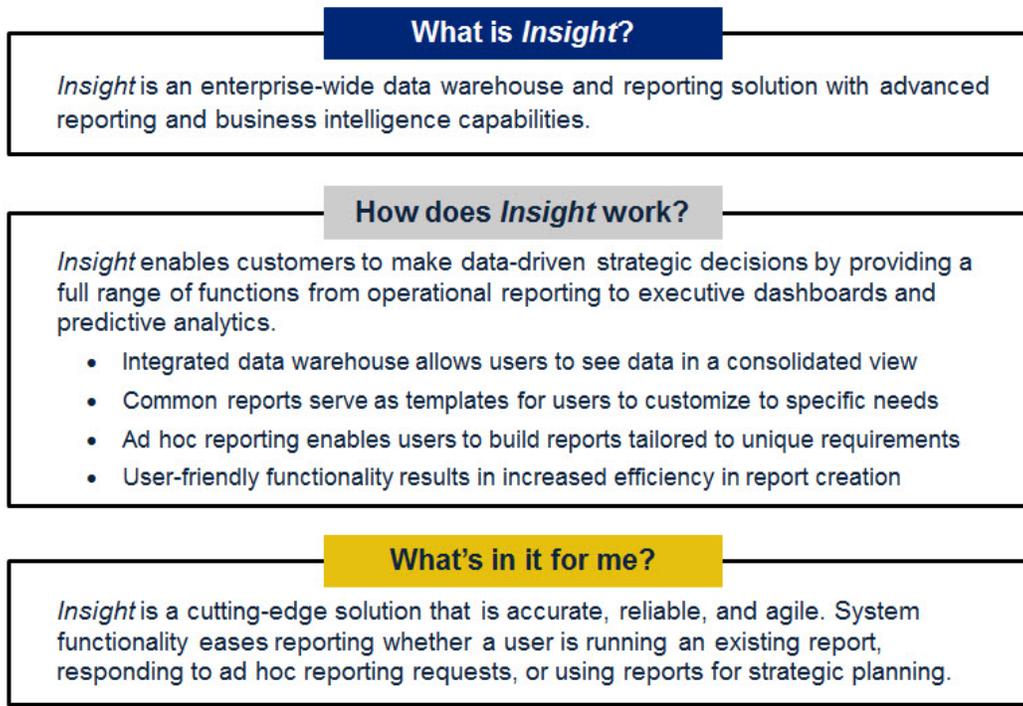
#### *Exercise 2.1: Reporting Discussion*

**Instructions:** In groups of three (3), discuss the following questions and be prepared to share with the group.

1. What is your role in running or creating reports?
2. What reports do you run or create most often?
3. Are there instances in which you would like to have several reports that you run all in one place?
4. What are trends or reports that your managers would want to see over time?

## 2.3. Purpose of *Insight*

Figure 1: Purpose of *Insight*



### Notes:

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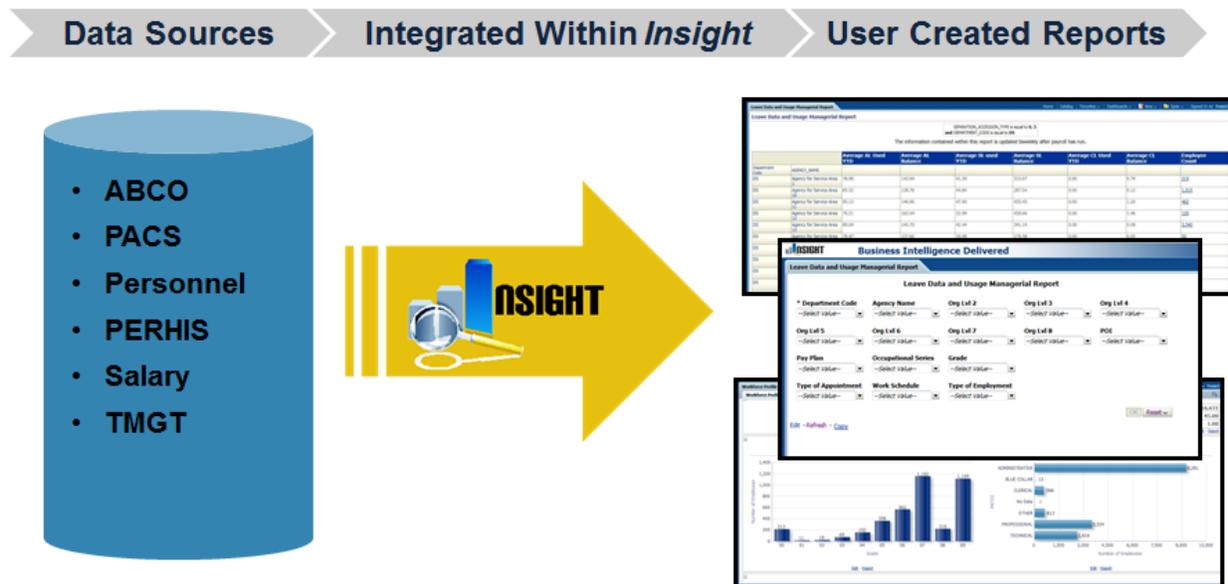
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## 2.4. How *Insight* Works

*Insight* combines multiple data sources in one reporting application so users can view data in new ways and engage in strategic reporting.

Figure 2: How *Insight* Works



## 2.5. Data in *Insight*

*Insight's* integrated data warehouse enables users to build reports and dashboards with data from the following sources:

Figure 3: Build 1 Data Sources and Descriptions

Data Source	Description
Administrative Billings and Collections System ( <i>ABCO</i> )	ABCO provides billings for administrative accounts receivable and provides internal accounting control and reporting.
Payroll Accounting System ( <i>PACS</i> )	PACS provides biweekly net salary payroll data for salary payments and employee leave after the Pay Computation System (PAYE) runs. It also provides Time & Attendance data for an employee (Note: Equivalent to PAYTA in FOCUS).
Personnel	Personnel contains employee profile information and processed personnel actions such as transfer, promotion, accession, performance appraisals, etc. (Note: Equivalent to PAYPERS in FOCUS).
Personnel History ( <i>PERHIS</i> )	PERHIS contains historical payroll and personnel information.
Salary	Salary provides the payroll actions processed each pay period (Note: Equivalent to PAYPERS in FOCUS).
Table Management ( <i>TMGT</i> )	TMGT provides table records (reference data) containing selected data elements from the payroll/personnel, financial, and administrative systems.

## 2.6. Security in *Insight*

### Security and Access Overview

*Insight* security and access protocols provide users with tailored access to data, based on Agency Security Officer (ASO) approved authorization. This influences:

Figure 4: Security in *Insight*

#### Whose data you can see

- **Organization level:** Department, Agency; Available Organization levels 2-8
- **Personnel Office Indicator:** Department, Agency, POI

#### What data you can see

- **Sensitive Information:** e.g., SSN, Disability, ERI, etc.
- **Non-sensitive Information:** e.g., OCC Series, Hire Effective Date, etc.

#### What you can do in *Insight*

- ***Insight* Consumer:** Run existing reports and dashboards, and edit dashboards
- ***Insight* Author:** Run existing reports and dashboards, edit and create new reports and dashboards using ad hoc functionality, manage permissions for saved folders

**Notes:**

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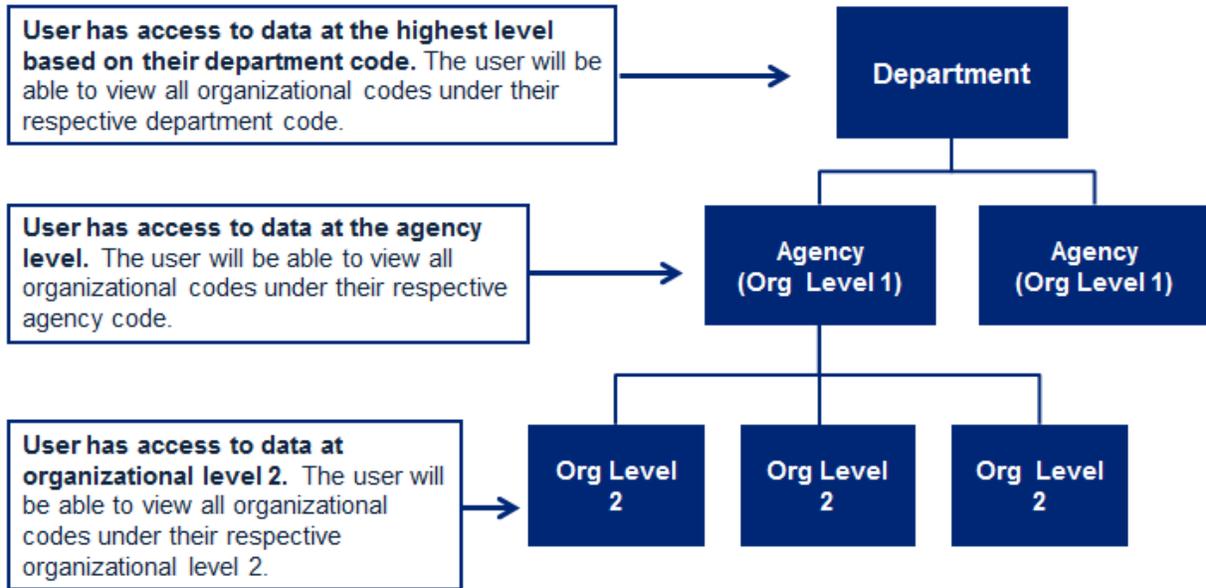


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## Security and Access: Org Level

*Insight* tailors users' view of data based on the level of the organization (e.g., department, agency, etc.) they have access to.

Figure 5: Security by Org Level



Whereas users with access at the department level have the ability to view data across all agencies, users with access at the agency level can only view data for their individual agency. The same structure applies for org levels 3-8.

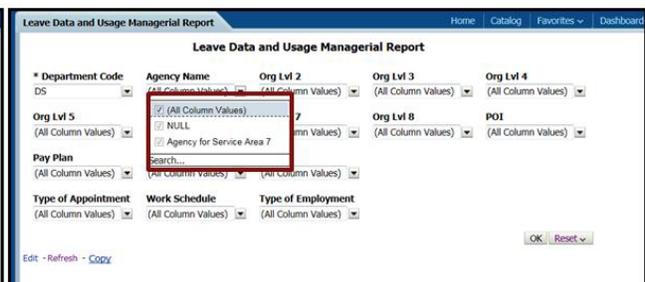
Figure 6: Access at the Department Level versus Access at the Agency Level

— **Access at the Department Level** —      — **Access at the Agency Level** —



This screenshot shows the "Leave Data and Usage Managerial Report" interface. The "Agency Name" dropdown is highlighted with a red box and contains a list of service areas: "Agency for Service Area 1", "Agency for Service Area 10", "Agency for Service Area 11", "Agency for Service Area 12", "Agency for Service Area 13", and "Agency for Service Area 14".

*Report prompts provide users with all org levels within the department.*



This screenshot shows the "Leave Data and Usage Managerial Report" interface. The "Agency Name" dropdown is highlighted with a red box and contains a limited list: "(All Column Values)", "NULL", and "Agency for Service Area 7".

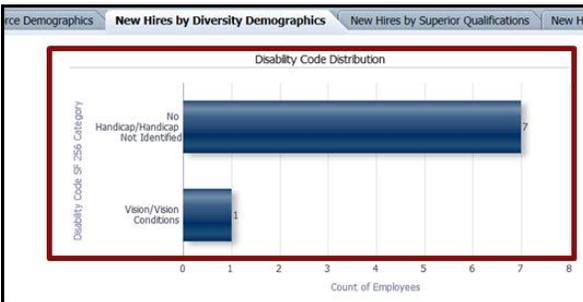
*Report prompts provide limited org levels for a specific agency.*

## Security and Access: Sensitive Information

Users' tailored access to sensitive information impacts the view of common reports and dashboards and what data is visible in ad hoc.

Figure 7: Sensitive Information in Common Reports and Dashboards

### Access to Sensitive Information: Common Report/Dashboard



Dashboard populates with sensitive information.

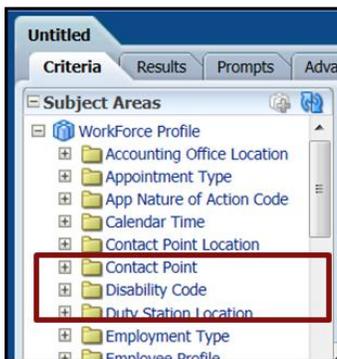
### No Access to Sensitive Information: Common Report/Dashboard



Dashboard summarizes data to mask sensitive information.

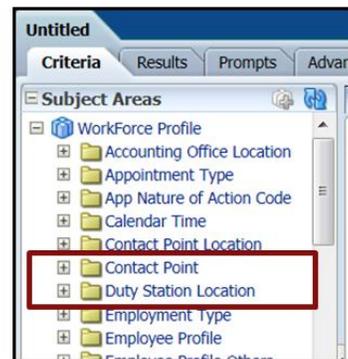
Figure 8: Sensitive Information in the Ad Hoc Environment

### Access to Sensitive Information: Ad Hoc Environment



Users have access to sensitive information in the ad hoc environment.

### No Access to Sensitive Information: Ad Hoc Environment



Users **do not** have access to sensitive information in the ad hoc environment.

## Security and Access: Role

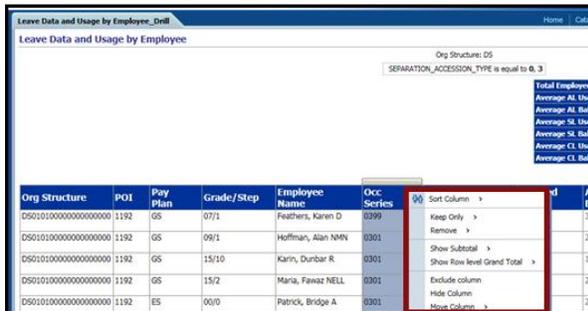
The *Insight Consumer* and *Insight Author* roles tailor the actions a user can take in the application.

Figure 9: User Roles in Insight

Actions	Insight Consumer	Insight Author
Access Common Reports	✓	✓
Access Common Dashboards	✓	✓
Edit Common Reports		✓
Edit Common Dashboards	✓	✓
Create Ad Hoc Reports		✓
Create Ad Hoc Dashboards		✓
Save to My Folders	✓	✓
Save to Shared Folders		✓

Figure 10: User Roles in Running Reports

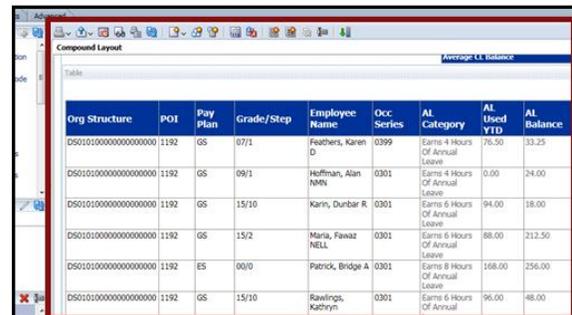
### Insight Consumer Role: Running Reports



Org Structure	POI	Pay Plan	Grade/Step	Employee Name	Occ Series
D50101000000000000000	1192	GS	07/1	Feathers, Karen D	0299
D50101000000000000000	1192	GS	09/1	Hoffman, Alan NMN	0301
D50101000000000000000	1192	GS	15/10	Karin, Dunbar R	0301
D50101000000000000000	1192	GS	15/2	Maria, Fawaz NELL	0301
D50101000000000000000	1192	ES	00/0	Patrick, Bridge A	0301

Users can make minor changes to the appearance of a report.

### Insight Author Role: Running Reports

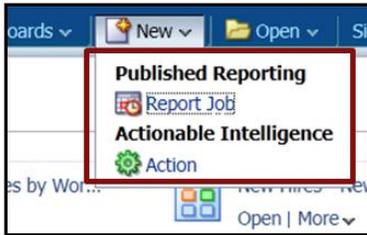


Org Structure	POI	Pay Plan	Grade/Step	Employee Name	Occ Series	AL Category	AL Used YTD	AL Balance
D50101000000000000000	1192	GS	07/1	Feathers, Karen D	0399	Earns 4 Hours Of Annual Leave	76.50	33.25
D50101000000000000000	1192	GS	09/1	Hoffman, Alan NMN	0301	Earns 4 Hours Of Annual Leave	0.00	24.00
D50101000000000000000	1192	GS	15/10	Karin, Dunbar R	0301	Earns 6 Hours Of Annual Leave	94.00	18.00
D50101000000000000000	1192	GS	15/2	Maria, Fawaz NELL	0301	Earns 6 Hours Of Annual Leave	88.00	212.50
D50101000000000000000	1192	ES	00/0	Patrick, Bridge A	0301	Earns 8 Hours Of Annual Leave	168.00	256.00
D50101000000000000000	1192	GS	15/10	Rawlings, Kathryn	0301	Earns 6 Hours Of Annual	96.00	48.00

Users have access to the ad hoc editing page to customize reports.

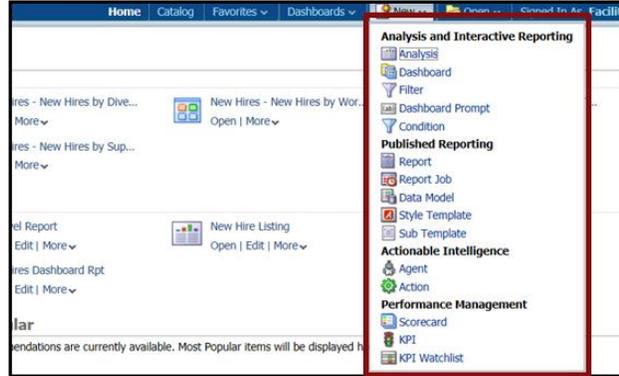
Figure 11: User Roles in the Ad Hoc Environment

**Insight Consumer Role:  
Ad Hoc Environment**



Users do not have access to the ad hoc environment to create new reports, filters, etc.

**Insight Author Role:  
Ad Hoc Environment**



Users have full access to the ad hoc environment to create ad hoc reports, dashboards, filters, prompts etc.

**2.7. Chapter Review**

*Chapter Summary*

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

- Describe *Insight* and the value it provides for strategic reporting and decision making
- Identify the data sources available within *Insight*
- Describe *Insight* security and access

**Notes:**

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## 3.0. Understanding Data in *Insight*

### 3.1. Chapter Overview

This chapter will review the way users interact with data in *Insight*, the frequency of data updates in the warehouse, and resources available to support understanding of data in *Insight*.

#### *Chapter Objectives*

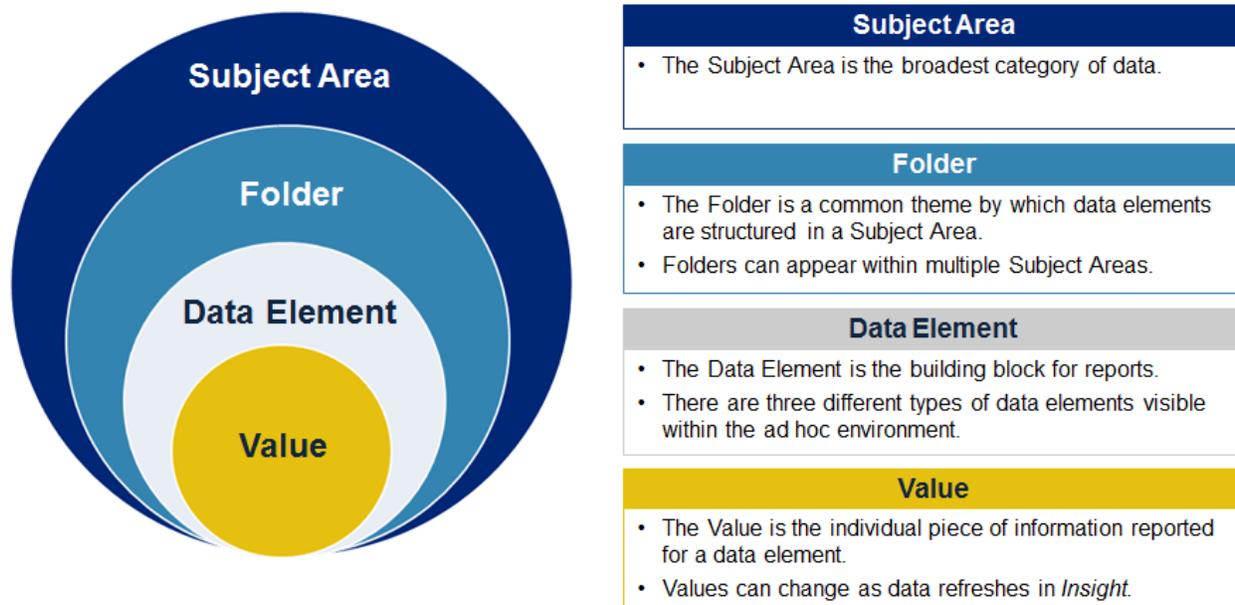
By the end of this chapter, you will be able to:

- Describe how data elements are organized in *Insight*
- Describe the different types of data elements in *Insight*
- Describe the *Insight* data loading cycles
- Identify where users can access a detailed description of available data elements

### 3.2. Data Structure

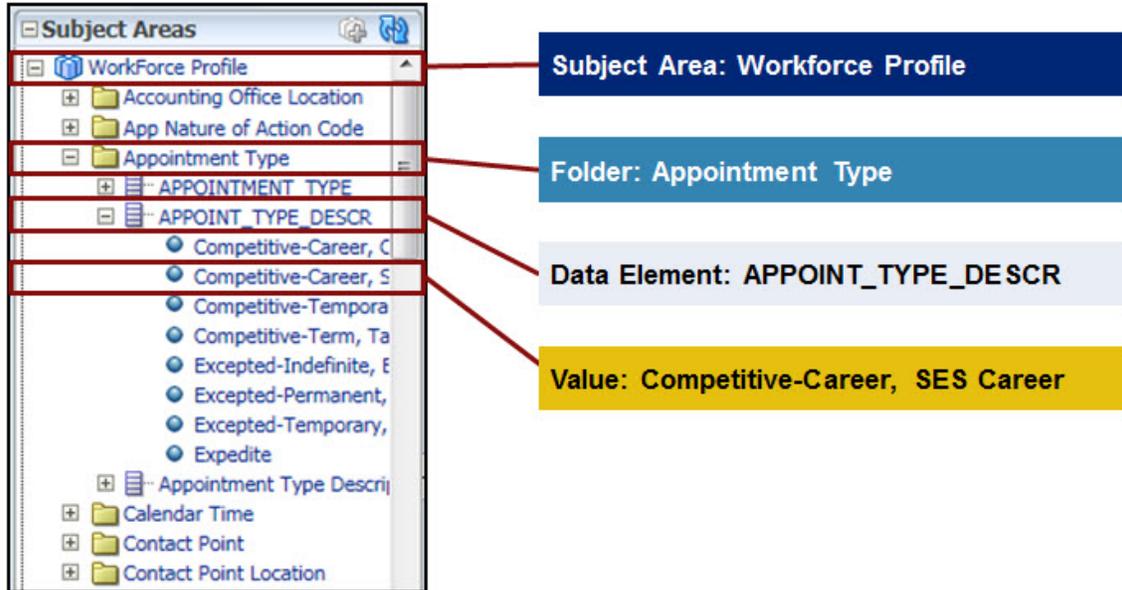
Data is structured according to a hierarchy of information, from the broadest view to the most detailed view.

Figure 12: Data Structure in *Insight*



The hierarchy of information is demonstrated within the Subject Areas pane in the ad hoc report editing page.

Figure 13: Example of Data Structure in Insight



## Types of Data

There are three types of data elements in *Insight* represented by unique icons.

Figure 14: Types of Data Elements

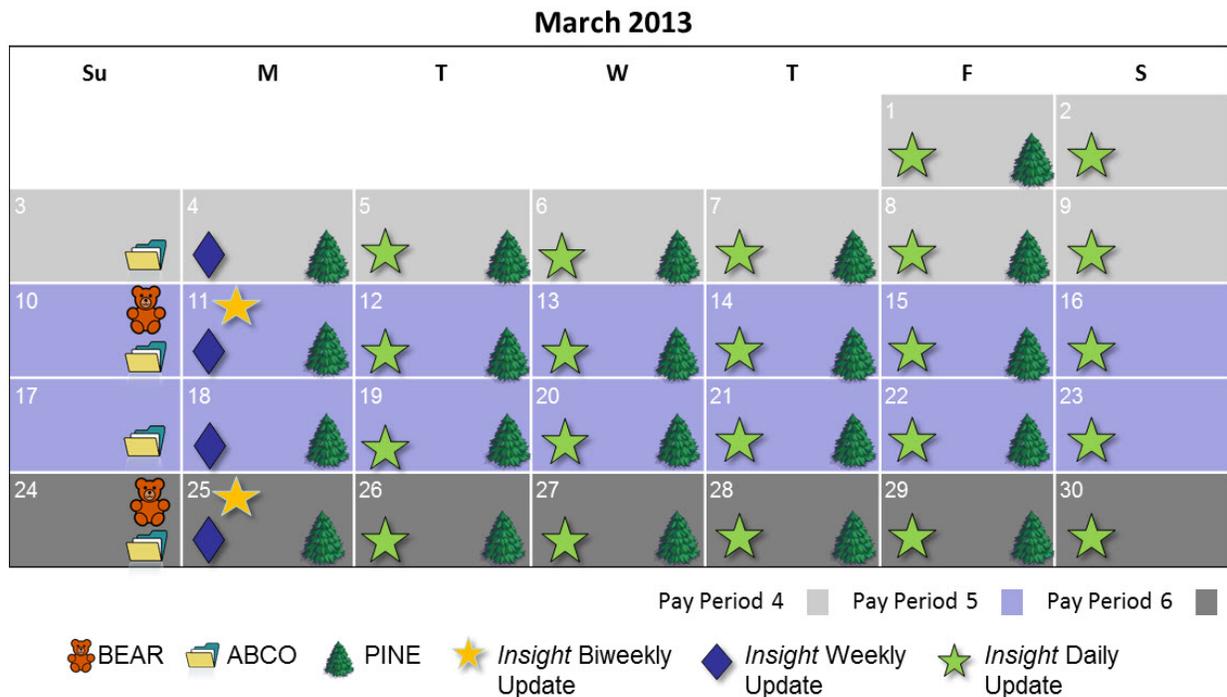
Type	Description	Example	Icon
Measure	Represents numeric data values that can change based on the scenario and can be aggregated.	• Employee Count	
Hierarchy	Represents related values that allow a user to drill-down into more detailed levels of the data. <ul style="list-style-type: none"> <li>• When users create a new report with a hierarchy data element, the report will yield a pivot table</li> <li>• Only one hierarchy can be used within a single report</li> <li>• Hierarchies should not be used as prompts</li> </ul>	• Location	
Attribute	Represents the largest set of data within <i>Insight</i> . There are three types of attribute data, including: <ul style="list-style-type: none"> <li>• <b>Time:</b> Represents various dimensions of time</li> <li>• <b>Source System:</b> Represents data pulled from the mainframe system</li> <li>• <b>Insight:</b> Represents data created specifically for <i>Insight</i> not previously housed in other data sources</li> </ul>	<i>Time:</i> • Pay Period Number  <i>Source System:</i> • Occ. Series  <i>Insight:</i> • PATCO Code Description	

### 3.3. Data Loading Cycle

*Insight* data updates align with traditional NFC PINE, ABCO, and BEAR updates.

- Daily Updates: *Insight* updates after PINE<sup>1</sup> on a daily basis.
- Weekly Updates: *Insight* updates after ABCO<sup>2</sup> on a weekly basis.
- Biweekly Updates: *Insight* updates after BEAR<sup>3</sup> on a biweekly basis.

Figure 15: *Insight* Data Loading Calendar



<sup>1</sup> PINE = Personnel Input and Edit System

<sup>2</sup> ABCO = Administrative Billings and Collections System

<sup>3</sup> BEAR = Biweekly Examination Analysis and Reporting

### 3.4. *Insight* Data Refresh Report

*Insight* includes a Data Refresh Report that users can access to validate the last date data was updated in the warehouse. The report is structured by Subject Area.

Figure 16: *Insight* Data Refresh Report

Data Refresh Report			
Subject Area	Ad-Hoc Table	Load Frequency	Last Loaded
Personnel Accounting	ABOVE_EARNINGS_PACS	BIWEEKLY	February 27, 2013
			March 04, 2013
			March 18, 2013
	APPOINTMENT_LIMITATION_PACS	BIWEEKLY	February 27, 2013
			March 04, 2013
			March 18, 2013
	APP_CHRG_PACS	BIWEEKLY	February 27, 2013
			March 04, 2013
	BOND_PACS	BIWEEKLY	February 27, 2013
			March 04, 2013
March 18, 2013			
CHAR_CONTRIBUTION_PACS	BIWEEKLY	February 27, 2013	
		March 04, 2013	
		March 18, 2013	
CHILD_SUPPORT_AND ALIMONY_PACS	BIWEEKLY	February 27, 2013	
		March 04, 2013	
		March 18, 2013	
CHK_ADDRESS_PACS	BIWEEKLY	February 27, 2013	
		March 04, 2013	
		March 18, 2013	
DIFFERENTIAL_PAY_PACS	BIWEEKLY	February 27, 2013	
		March 04, 2013	
		March 18, 2013	
EARNING_LIMITATION_PACS	BIWEEKLY	February 27, 2013	
		March 04, 2013	

Rows 1 - 25

The Data Refresh Report is located in the *Insight* System Reports folder within the Catalog Shared Folders.

**Notes:**

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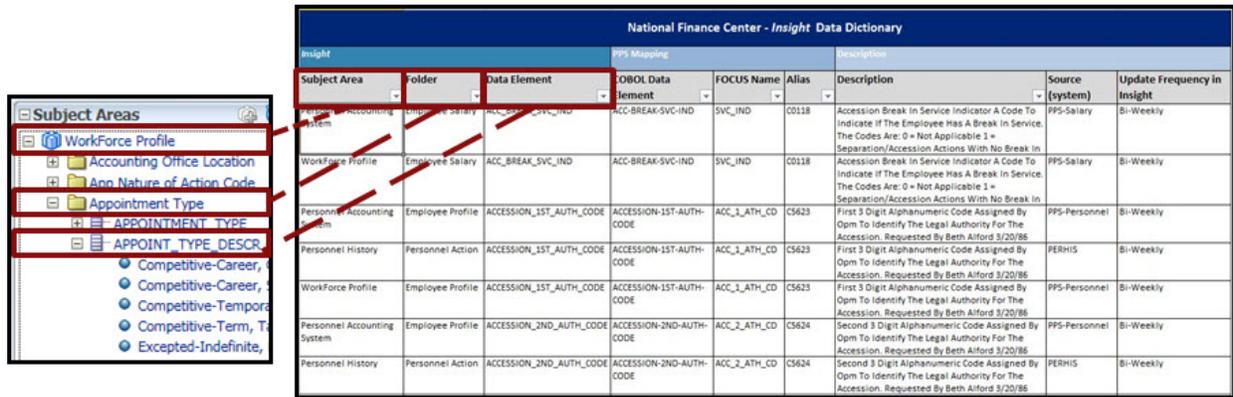
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### 3.5. *Insight* Data Dictionary

The *Insight* Data Dictionary outlines the data available within *Insight*. Use the *Insight* Data Dictionary as a reference to better understand:

- Data elements that comprise each Subject Area
- COBOL name, FOCUS name, and description for each data element
- Data source - either *Insight* or PPS
- Update frequency for each data element in the warehouse

Figure 17: *Insight* Data Dictionary



Subject Area	Folder	Data Element	COBOL Data Element	FOCUS Name	Alias	Description	Source (system)	Update Frequency in Insight
Personnel Accounting System	Employee Salary	ACC_BREAK_SVC_IND	ACC-BREAK-SVC-IND	SVC_IND	C0118	Accession Break In Service Indicator A Code To Indicate If The Employee Has A Break In Service. The Codes Are: 0 = Not Applicable 1 = Separation/Accession Actions With No Break In	PPS-Salary	Bi-Weekly
WorkForce Profile	Employee Salary	ACC_BREAK_SVC_IND	ACC-BREAK-SVC-IND	SVC_IND	C0118	Accession Break In Service Indicator A Code To Indicate If The Employee Has A Break In Service. The Codes Are: 0 = Not Applicable 1 = Separation/Accession Actions With No Break In	PPS-Salary	Bi-Weekly
Personnel Accounting System	Employee Profile	ACCESSION_1ST_AUTH_CODE	ACCESSION-1ST-AUTH-CODE	ACC_1_ATH_CD	C5623	First 3 Digit Alphanumeric Code Assigned By Opn To Identify The Legal Authority For The Accession. Requested By Beth Ailford 3/20/86	PPS-Personnel	Bi-Weekly
Personnel History	Personnel Action	ACCESSION_1ST_AUTH_CODE	ACCESSION-1ST-AUTH-CODE	ACC_1_ATH_CD	C5623	First 3 Digit Alphanumeric Code Assigned By Opn To Identify The Legal Authority For The Accession. Requested By Beth Ailford 3/20/86	PERHIS	Bi-Weekly
WorkForce Profile	Employee Profile	ACCESSION_1ST_AUTH_CODE	ACCESSION-1ST-AUTH-CODE	ACC_1_ATH_CD	C5623	First 3 Digit Alphanumeric Code Assigned By Opn To Identify The Legal Authority For The Accession. Requested By Beth Ailford 3/20/86	PPS-Personnel	Bi-Weekly
Personnel Accounting System	Employee Profile	ACCESSION_2ND_AUTH_CODE	ACCESSION-2ND-AUTH-CODE	ACC_2_ATH_CD	C5624	Second 3 Digit Alphanumeric Code Assigned By Opn To Identify The Legal Authority For The Accession. Requested By Beth Ailford 3/20/86	PPS-Personnel	Bi-Weekly
Personnel History	Personnel Action	ACCESSION_2ND_AUTH_CODE	ACCESSION-2ND-AUTH-CODE	ACC_2_ATH_CD	C5624	Second 3 Digit Alphanumeric Code Assigned By Opn To Identify The Legal Authority For The Accession. Requested By Beth Ailford 3/20/86	PERHIS	Bi-Weekly

#### Notes:

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### 3.6. Understanding Data in *Insight*: Exercises

#### *Exercise 3.1: Data Structure*

**Instructions:** Choose True or False for each of the statements below:

1. True/False Values remain static and will never change.
2. True/False Subject Area >> Folder >> Data Element >> Value represents the hierarchy of data from broad to narrow.
3. True/False Folders and data elements are organized in alphabetical order.

#### *Exercise 3.2: Types of Data*

**Instructions:** Match the data element type to its description and icon.

- |                 |   |
|-----------------|---|
| 1. ___Measure   | A.  Largest set of data; consists of three types: Time, Source System and <i>Insight</i> . |
| 2. ___Hierarchy | B.  Numeric data values that can be aggregated in some way.                                |
| 3. ___Attribute | C.  Related values that allow a user to drill-down into more detailed levels of the data.  |

### 3.7. Chapter Review

#### *Chapter Summary*

Having completed this chapter, you are now able to:

- Describe how data elements are organized in *Insight*
- Describe the different types of data elements in *Insight*
- Describe the *Insight* data loading cycles
- Identify where users can access a detailed description of available data elements

#### **Notes:**

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## 4.0. Understanding Reports and Dashboards in *Insight*

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### 4.1. Chapter Overview

This chapter will review the purpose of the Common Report Library and the value of common reports and dashboards in *Insight*.

#### *Chapter Objectives*

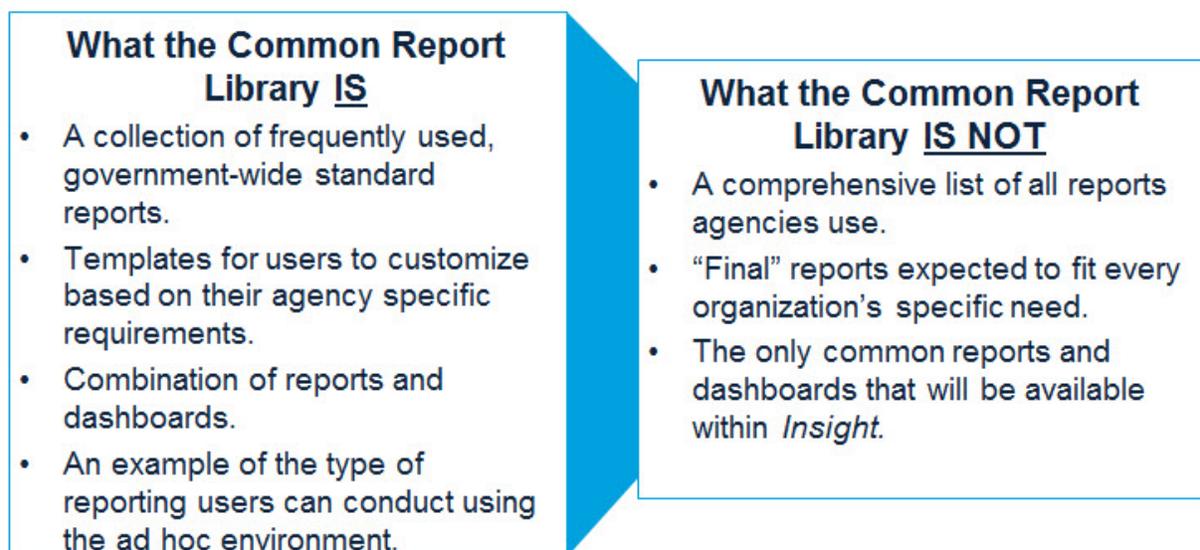
By the end of this chapter, you will be able to:

- Describe the purpose of the Common Report Library
- Describe the types of common reports available within the Common Report Library
- Describe the value and utility of dashboards
- Identify the relationship between reports and dashboards

### 4.2. Common Report Library

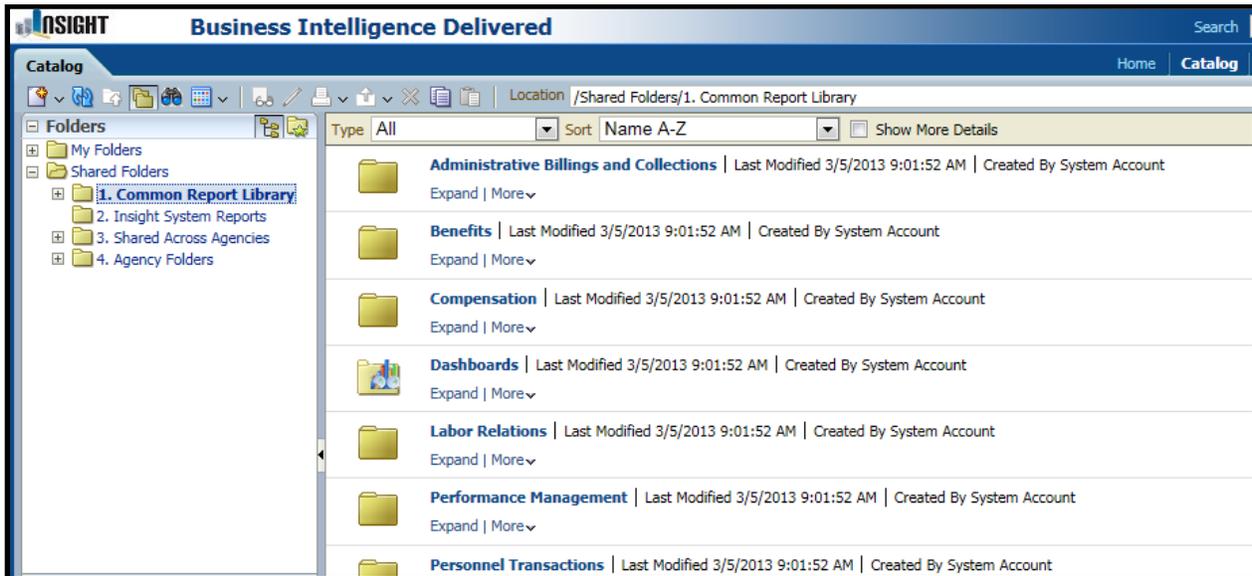
The Common Report Library is a set of frequently used, government-wide reports and dashboards that serve as templates for agencies to customize for their specific needs.

*Figure 18: Description of the Insight Common Report Library*



The structure of the Common Report Library follows the Office of Personnel Management’s (OPM) Business Reference Model (BRM) categories which outline each function in the Human Resource (HR) life cycle. Each folder within the Common Report Library represents one of these functions.

Figure 19: Folder Structure of the Common Report Library



The Common Report Library contains both reports and dashboards, which are represented by different icons and serve different purposes in the reporting process.

Figure 20: Reports and Dashboards

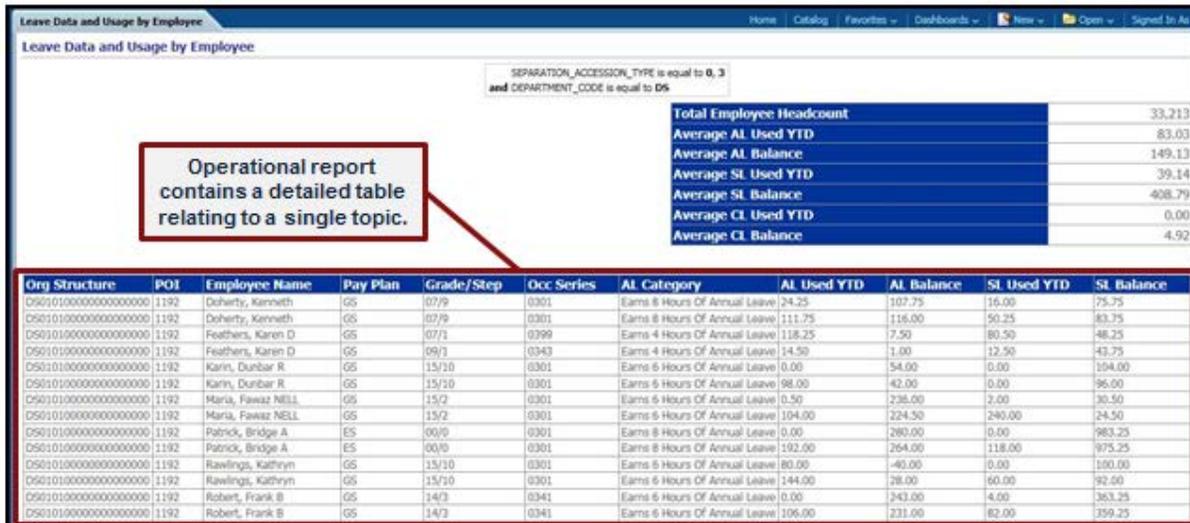
Type	Description	Example	Icon
Report	<p>A report is a combination of information that answers a business question. Reports can include a table, text, graph, etc.</p> <p>There are two types of reports:</p> <ul style="list-style-type: none"> <li>Operational</li> <li>Managerial</li> </ul>	<p><i>Operational</i></p> <ul style="list-style-type: none"> <li>Leave Data and Usage by Employee</li> </ul> <p><i>Managerial</i></p> <ul style="list-style-type: none"> <li>Leave Data and Usage Managerial Report</li> </ul>	
Dashboard	<p>A dashboard presents a “snapshot” of data findings across multiple reports within a common theme or purpose.</p> <p>Dashboards provide management summaries, drill-down analysis, trend analysis, variance analysis, etc.</p>	<p><i>Dashboard</i></p> <ul style="list-style-type: none"> <li>New Hires Dashboard</li> </ul>	

### 4.3. Types of Reports in the Common Report Library

#### Operational Reports

Operational reports are the most detailed reports and answer a business question with a simple table or graph.

Figure 21: Operational Report



SEPARATION\_ACCESSION\_TYPE is equal to 0, 3  
and DEPARTMENT\_CODE is equal to DS

Total Employee Headcount	33,213
Average AL Used YTD	83.03
Average AL Balance	149.13
Average SL Used YTD	39.14
Average SL Balance	408.79
Average CL Used YTD	0.00
Average CL Balance	4.92

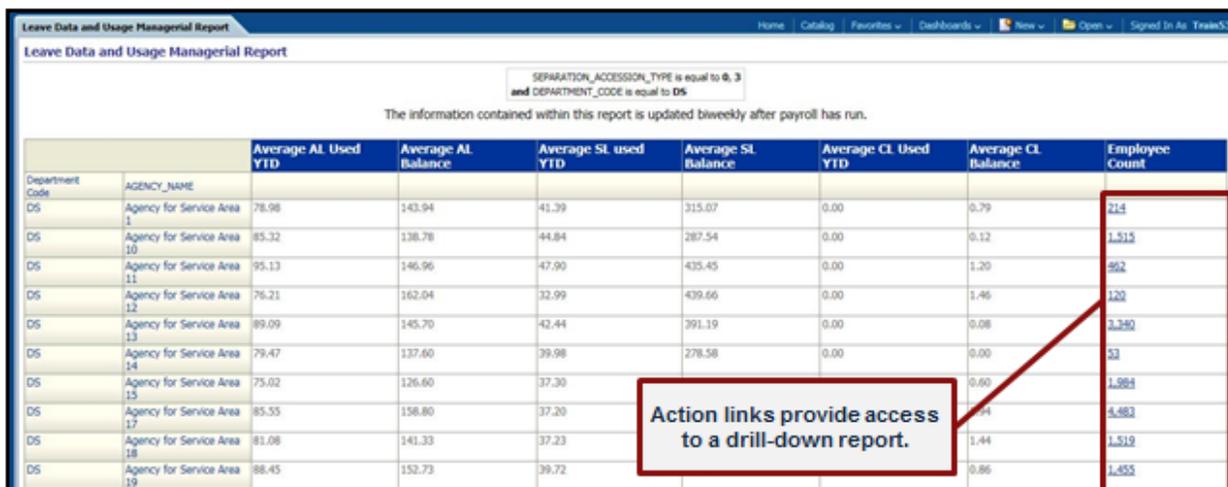
Operational report contains a detailed table relating to a single topic.

Org Structure	POI	Employee Name	Pay Plan	Grade/Step	Occ Series	AL Category	AL Used YTD	AL Balance	SL Used YTD	SL Balance
050010100000000000000000	1192	Doherty, Kenneth	GS	0779	0301	Earns 8 Hours Of Annual Leave	24.25	107.75	16.00	75.75
050010100000000000000000	1192	Doherty, Kenneth	GS	0779	0301	Earns 8 Hours Of Annual Leave	111.75	116.00	50.25	83.75
050010100000000000000000	1192	Feathers, Karen D	GS	0771	0399	Earns 4 Hours Of Annual Leave	118.25	7.50	80.50	48.25
050010100000000000000000	1192	Feathers, Karen D	GS	0973	0343	Earns 4 Hours Of Annual Leave	14.50	1.00	12.50	43.75
050010100000000000000000	1192	Karin, Dunbar R	GS	1570	0301	Earns 6 Hours Of Annual Leave	0.00	54.00	0.00	104.00
050010100000000000000000	1192	Karin, Dunbar R	GS	1570	0301	Earns 6 Hours Of Annual Leave	98.00	42.00	0.00	96.00
050010100000000000000000	1192	Maria, Fawaz NELL	GS	1572	0301	Earns 6 Hours Of Annual Leave	0.50	236.00	2.00	30.50
050010100000000000000000	1192	Maria, Fawaz NELL	GS	1572	0301	Earns 6 Hours Of Annual Leave	104.00	224.50	240.00	24.50
050010100000000000000000	1192	Patrick, Bridge A	ES	0070	0301	Earns 8 Hours Of Annual Leave	0.00	280.00	0.00	983.25
050010100000000000000000	1192	Patrick, Bridge A	ES	0070	0301	Earns 8 Hours Of Annual Leave	192.00	264.00	118.00	975.25
050010100000000000000000	1192	Rawlings, Kathryn	GS	1570	0301	Earns 6 Hours Of Annual Leave	80.00	-40.00	0.00	100.00
050010100000000000000000	1192	Rawlings, Kathryn	GS	1570	0301	Earns 6 Hours Of Annual Leave	144.00	28.00	60.00	92.00
050010100000000000000000	1192	Robert, Frank B	GS	1473	0341	Earns 6 Hours Of Annual Leave	0.00	243.00	4.00	363.25
050010100000000000000000	1192	Robert, Frank B	GS	1473	0341	Earns 6 Hours Of Annual Leave	106.00	231.00	62.00	359.25

#### Managerial Reports

Managerial reports provide a mid-level data detail. Drill-down functionality gives users a more detailed data view based on the selection, ideal for supervisors and managers. Users can distinguish managerial reports from operational reports as the title will include “Managerial Report.”

Figure 22: Managerial Report



SEPARATION\_ACCESSION\_TYPE is equal to 0, 3  
and DEPARTMENT\_CODE is equal to DS

The information contained within this report is updated biweekly after payroll has run.

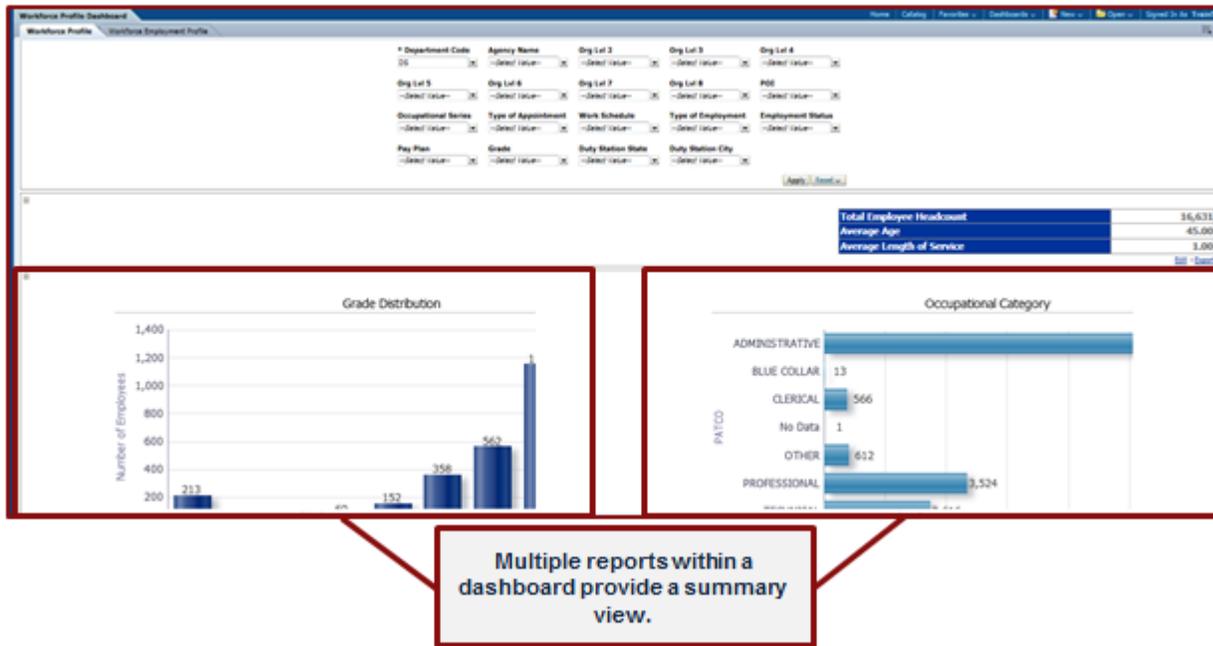
Department Code	AGENCY_NAME	Average AL Used YTD	Average AL Balance	Average SL used YTD	Average SL Balance	Average CL Used YTD	Average CL Balance	Employee Count
DS	Agency for Service Area 1	78.98	143.94	41.39	315.07	0.00	0.79	214
DS	Agency for Service Area 10	85.32	138.78	44.84	287.54	0.00	0.12	1,513
DS	Agency for Service Area 11	95.13	146.96	47.90	435.45	0.00	1.20	662
DS	Agency for Service Area 12	76.21	162.04	32.99	439.66	0.00	1.46	120
DS	Agency for Service Area 13	89.09	145.70	42.44	391.19	0.00	0.08	3,240
DS	Agency for Service Area 14	79.47	137.60	39.98	278.58	0.00	0.00	53
DS	Agency for Service Area 15	75.02	126.60	37.30			0.60	1,984
DS	Agency for Service Area 17	85.55	158.80	37.20			0.74	5,483
DS	Agency for Service Area 18	81.08	141.33	37.23			1.44	1,519
DS	Agency for Service Area 19	88.45	152.73	39.72			0.86	1,455

Action links provide access to a drill-down report.

## Dashboards

Dashboards provide the user with the “30,000 foot view” of data across a common theme or purpose with the ability to drill-down to a detailed look at a specific subset of information.

Figure 23: Dashboard



### Notes:

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#### 4.4. Understanding Reports and Dashboards in *Insight*: Exercises

##### *Exercise 4.1: Common Report Library*

**Instructions:** Circle the four (4) statements that accurately describe the *Insight* Common Report Library:

1. Illustrates the type of reporting users can conduct in the ad hoc environment.
2. Includes a comprehensive list of all reports that agencies use.
3. Contains “final” reports that cannot be edited or customized.
4. Includes a collection of frequently used, government-wide standard reports.
5. Contains the only common reports that will be available within *Insight*.
6. Contains a combination of reports and dashboards.
7. Serves as a collection of templates for users to customize based on their agency specific requirements.
8. Contains only reports that I create as an individual user.

*Exercise 4.2: Reports and Dashboards*

**Instructions:** Write “R” next to the situation(s) in which you would create a report and write “D” next to the situation(s) in which you would create a dashboard.

1.		You need to provide agency leadership with the amount of leave each employee has remaining for the fiscal year.
2.		Department leadership has asked you to create a snapshot view of the number of employees in each agency, the amount of open positions in each agency, and number of retirements from each agency for the last 5 years.
3.		You want to see a summary view of the reports you share with your leadership on a bi-weekly basis.
4.		You need to create a list of employees on injury leave by pay plan.

**4.5. Chapter Review**

*Chapter Summary*

Having completed this chapter, you are now able to:

- Describe the purpose of the Common Report Library
- Describe the types of common reports available within the Common Report Library
- Describe the value and utility of dashboards
- Identify the relationship between reports and dashboards



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## 5.0. Basic Navigation

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### 5.1. Chapter Overview

This chapter will review *Insight's* user friendly functionality, including basic navigation and accessing the Common Report Library.

#### *Chapter Objectives*

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

- Describe *Insight* key terms
- Demonstrate *Insight* sign in and basic navigation
- Describe structure of *Insight* My Folders and Shared Folders

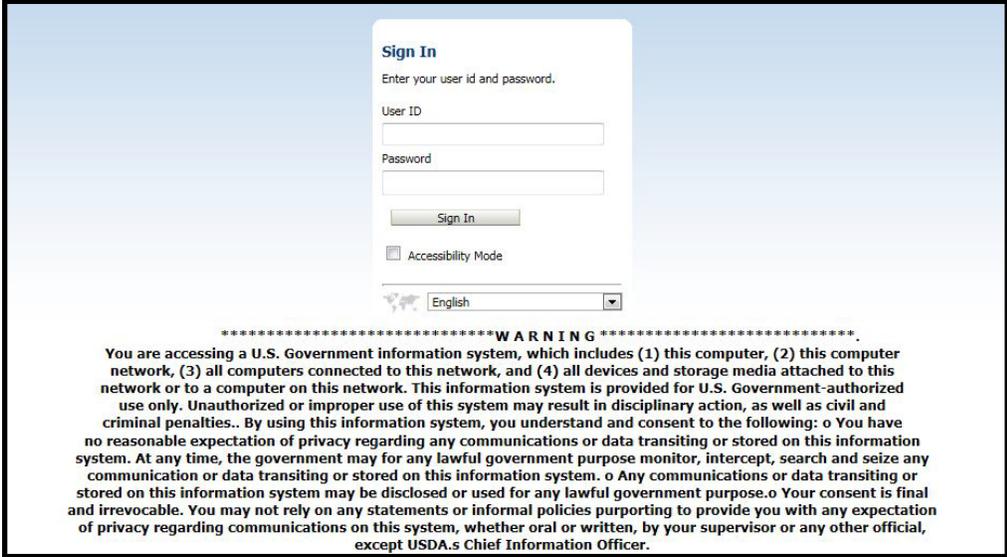
### 5.2. *Insight* Key Terms

The *Insight* Participant Guide Appendix contains a glossary of key terms and icons that are helpful as users navigate *Insight*, including:

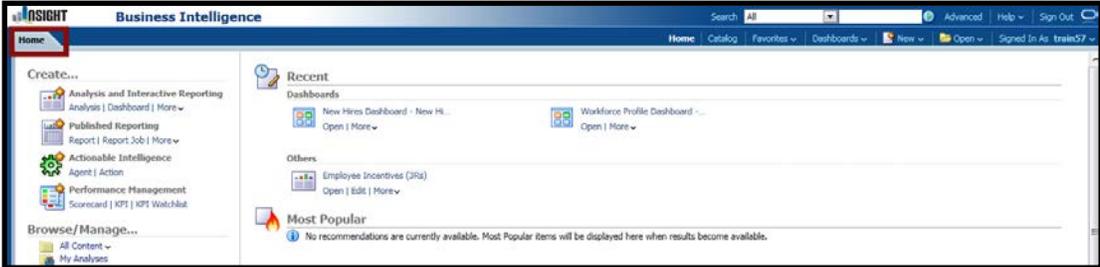
- **Analysis:** Another name for report in *Insight*, an analysis answers an inquiry or request against an organization's data.
- **Catalog:** Organization system that provides access to personal and shared folders, including the Common Report Library.
- **Dashboard:** A "snapshot" of data findings across multiple reports in a common theme or purpose.
- **My Folders:** Folders that contain the user's privately saved reports; these reports cannot be accessed by other users.
- **Prompt:** Mechanism that the user can manipulate to restrict the data at the time the report or dashboard runs.
- **Shared Folders:** Folders that allow the user to access the Common Report Library, *Insight* System Reports, Shared Across Agencies, agency specific folders, and other reports users have made available.

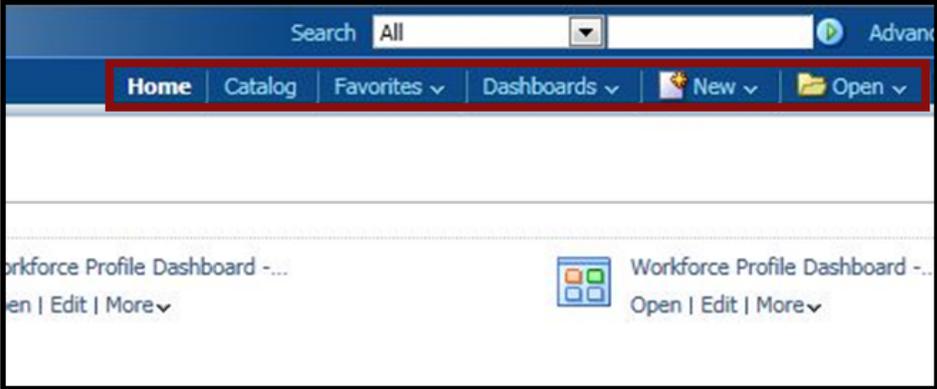
### 5.3. Basic Navigation

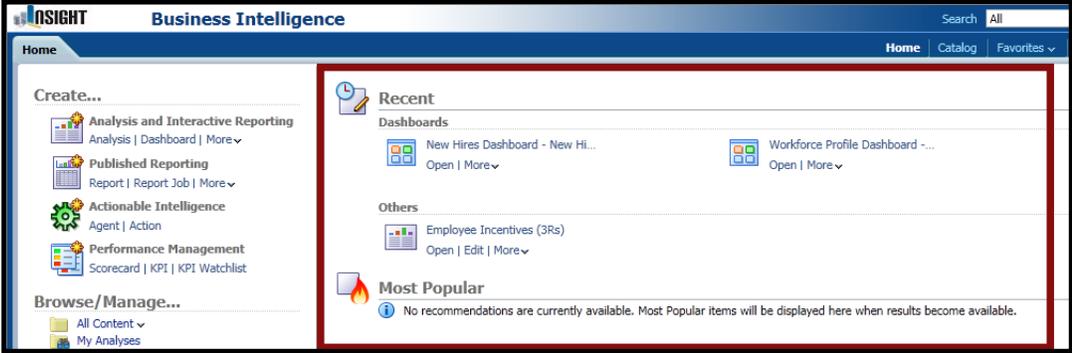
#### Sign in to *Insight*

Step	Action
1.	<p>Sign in using User ID and Password.</p> <p style="text-align: center;"><i>Figure 25: Insight Sign in page</i></p> 

#### Navigate the *Insight* Home Page

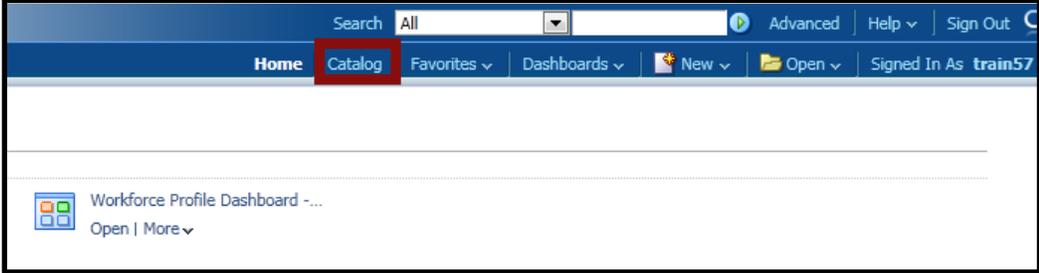
Step	Action
1.	<p>View the <i>Insight</i> home page.</p> <p style="text-align: center;"><i>Figure 26: Insight Home Page</i></p> 
	<p><b>TIP:</b> The tab in the top left corner of the screen will update based on the page within <i>Insight</i> the user has accessed.</p>

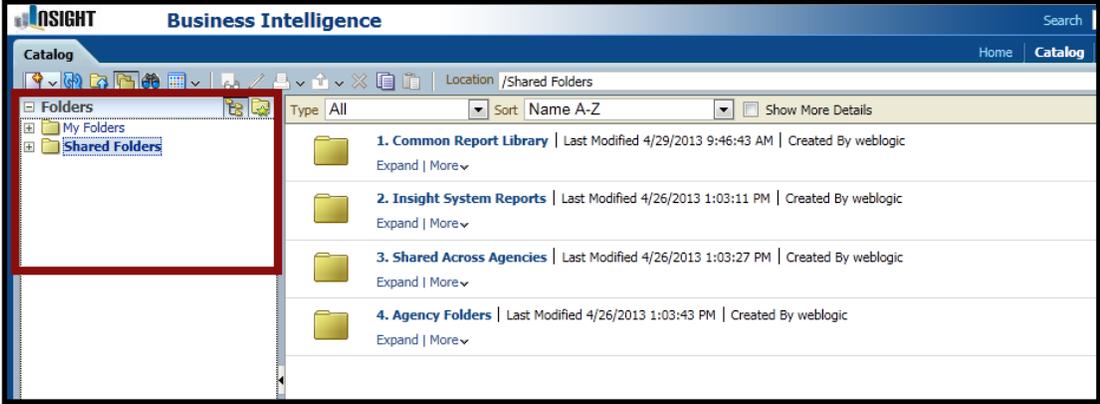
Step	Action
2.	<p>Navigate to the top navigation bar. This provides shortcuts to a number of frequently accessed pages within <i>Insight</i>.</p> <ul style="list-style-type: none"> <li>• <b>Home:</b> Returns user to the home page.</li> <li>• <b>Catalog:</b> Provides users access to My Folders and Shared Folders, including the Common Report Library.</li> <li>• <b>Favorites:</b> Provides a shortcut to favorite reports that have been bookmarked for easy access.</li> <li>• <b>Dashboards:</b> Provides user access common dashboards and My Dashboard.</li> <li>• <b>New:</b> Allows the user to create a new report, dashboard, or other reporting component.</li> <li>• <b>Open:</b> Provides the user access to an existing report or dashboard.</li> </ul> <p style="text-align: center;"><i>Figure 27: Top Navigation Bar</i></p> 

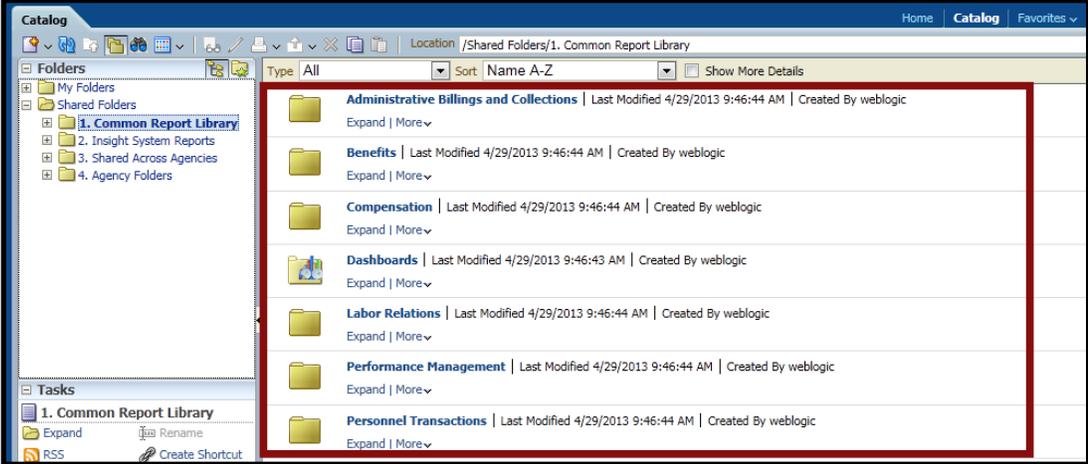
Step	Action
3.	<p>View the center navigation which includes shortcuts to the most recent and popular reports and dashboards.</p> <ul style="list-style-type: none"> <li>• The Most Popular section of the home page populates with the most frequently accessed reports among the user’s community.</li> <li>• Click the Open, Edit, More action links under each report or dashboard to view or customize these reports/dashboards from the home page.</li> </ul> <p style="text-align: center;"><i>Figure 28: Center Navigation on Insight Home Page</i></p> 

## 5.4. Insight Catalog

### Access the *Insight* Catalog

Step	Action
1.	<p>Click the <b>Catalog</b> action link from the top navigation bar.</p> <p style="text-align: center;"><i>Figure 29: Catalog Action Link on Insight Home Page</i></p> 

Step	Action
2.	<p>View the <b>Folders</b> pane. This contains My Folders and Shared Folders where all saved reports and dashboards are stored.</p> <ul style="list-style-type: none"> <li>• <b>My Folders:</b> Personal folder; only the user has access to the reports and dashboards in My Folders.</li> <li>• <b>Shared Folders:</b> Public folder; contains the Common Report Library, <i>Insight</i> System Reports, Shared Across Agencies folder, and Agency Folders.</li> </ul> <p style="text-align: center;"><i>Figure 30: My Folders and Shared Folders in Folders Pane</i></p> 
	<p><b>TIP:</b> Users with the <i>Insight</i> Author role can create new folders within My Folders and Shared Folders. <i>Insight</i> Authors can control access to new folders created within Agency Folders. For more information regarding controlling access and permissions, reference Appendix B.</p>

Step	Action
<p>3.</p>	<p>View the Common Report Library.</p> <p style="text-align: center;"><i>Figure 31: Insight Common Report Library</i></p> 
<p>4.</p>	<p>Identify reports and dashboards using the unique icon that precedes the title of each item.</p> <p>  <b>Report or Analysis:</b> Includes a combination of information that answers a single business question. Reports can include a table, text, graph, etc.         </p> <p>  <b>Dashboard:</b> Presents a snapshot of data findings across multiple reports in a common theme or purpose. Answers several business questions on a similar theme.         </p>

**Notes:**

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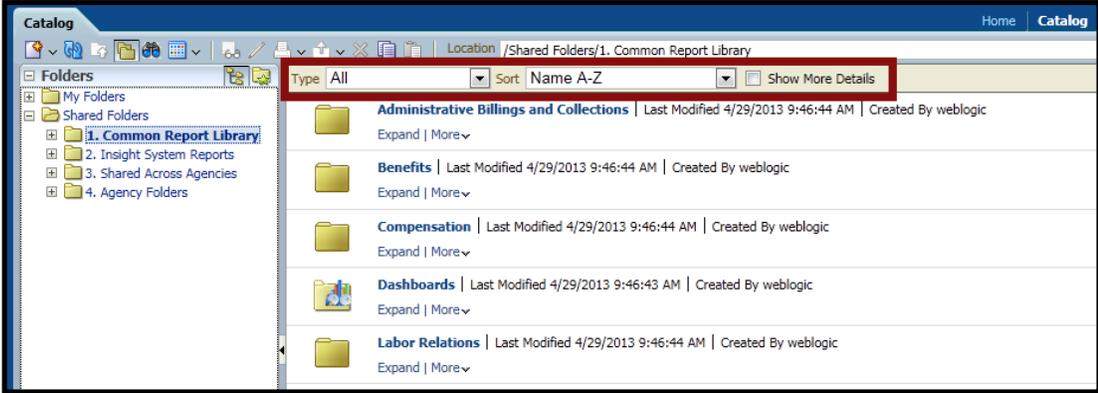
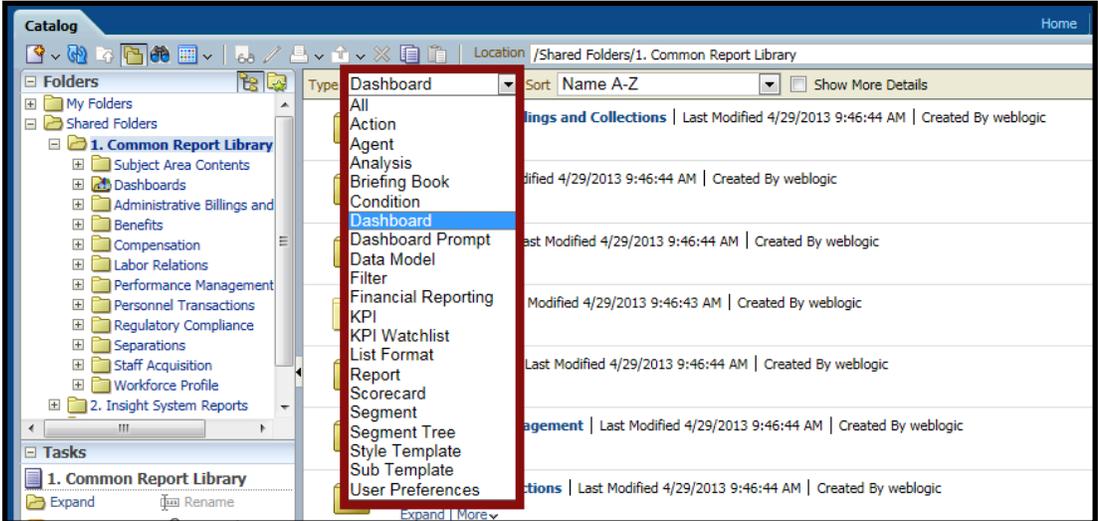


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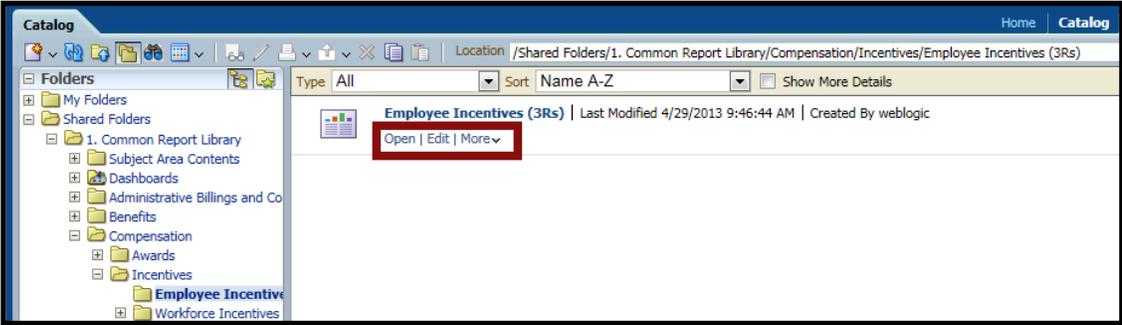


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## Manipulate the View Within the Catalog

Step	Action
1.	<p>Manipulate the Catalog view by using the Type or Sort drop-down menus, which change how items are displayed in the Catalog.</p> <p style="text-align: center;"><i>Figure 32: Type and Sort Drop-Down Menus</i></p> 
2.	<p>Use the Type drop-down to filter the Catalog to a certain type of item (e.g., Analysis (report) or Dashboard).</p> <p style="text-align: center;"><i>Figure 33: Type Drop-Down Menu</i></p> 
	<p><b>TIP:</b> Set the Type back to All in order to reset the Catalog to the default view of all items.</p>

## Insight Catalog Action Links

Step	Action
1.	<p>Use the action links directly below the report or dashboard title as a shortcut to a number of tasks.</p> <ul style="list-style-type: none"> <li>• <b>Open:</b> Directs users to a new page that runs the report.</li> <li>• <b>Edit:</b> Directs users to the ad hoc report editing page to edit the structure and/or appearance of the report.</li> <li>• <b>More:</b> Provides a list of additional options for users to Print, Export, Schedule, Add to Favorites, etc.</li> </ul> <p style="text-align: center;"><i>Figure 34: Common Report Library Action Links</i></p> 
	<p><b>IMPORTANT:</b> By nature, dashboards have multiple components (e.g., reports, prompts, etc.). Because of this, when users access dashboards from the Catalog, they will view a folder which can be expanded to see the individual items. To run the full dashboard, click Dashboards folder in the Folder pane and the Open action link for the desired dashboard from the view pane.</p>

### Notes:

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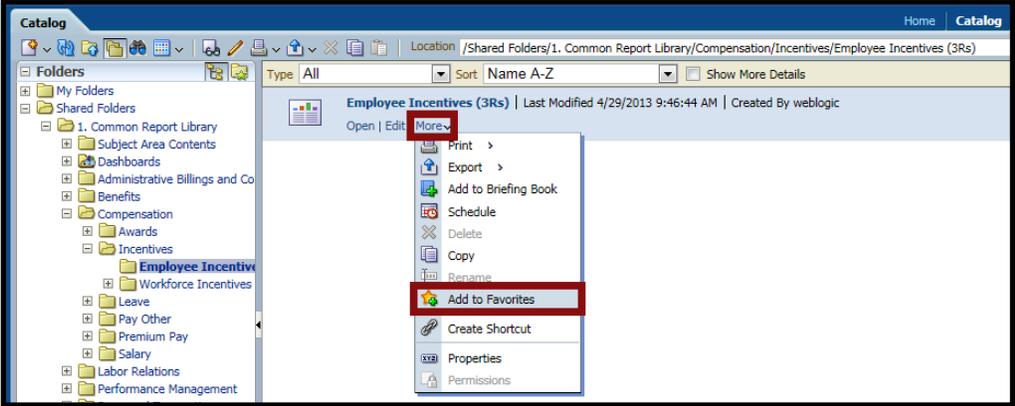
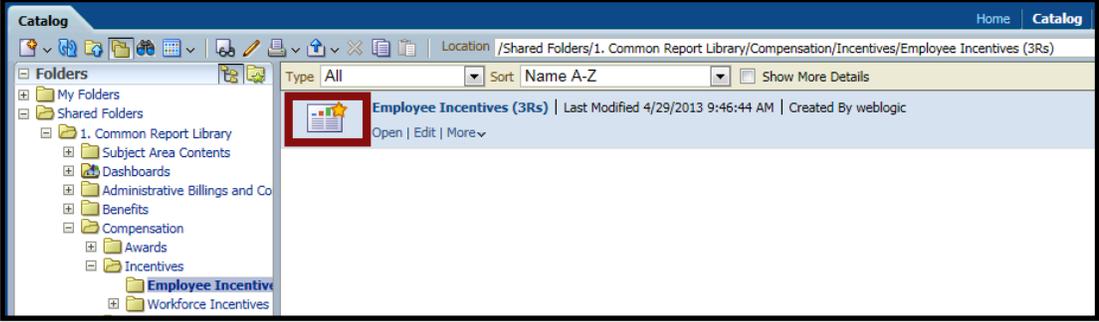
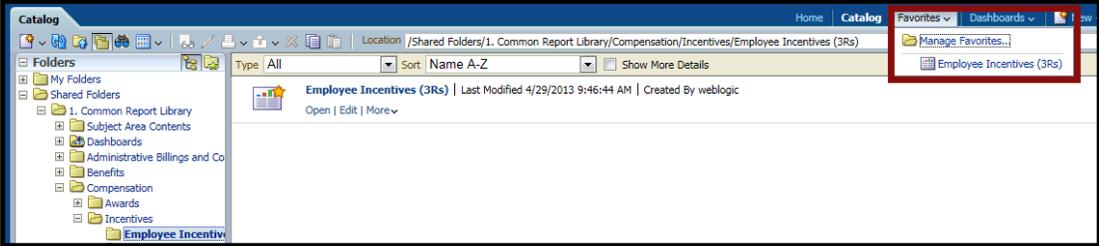


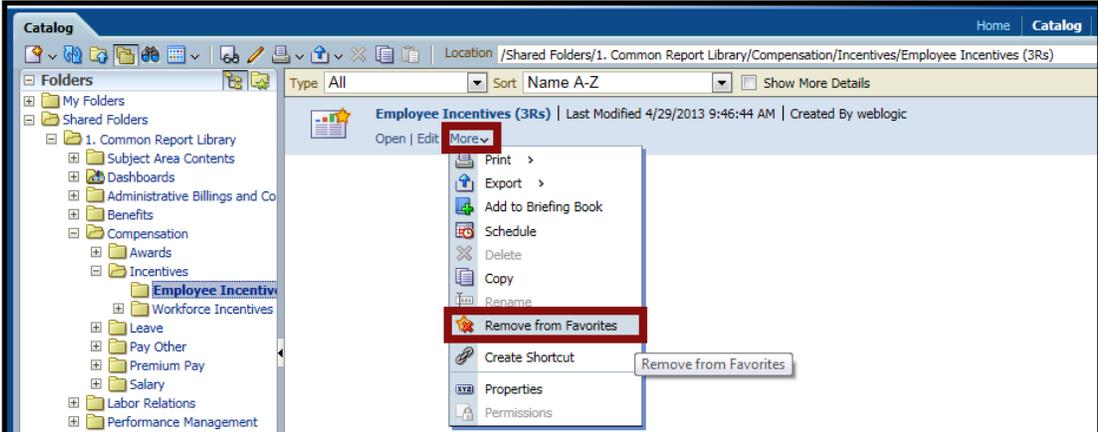
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## Add a Report to Favorites

Step	Action
1.	<p>Click the <b>More</b> action link from the Catalog and select <b>Add to Favorites</b>.</p> <p><i>Figure 35: More Drop-Down Menu with Add to Favorites Highlighted</i></p> 
2.	<p>View the yellow star on the report icon indicating it is part of the Favorites menu.</p> <p><i>Figure 36: Favorite Indicator</i></p> 
3.	<p>Click the <b>Favorites</b> action link to view the list of favorite reports in the top navigation bar.</p> <p><i>Figure 37: Favorites Action Link</i></p> 

Step	Action
4.	<p>Click the <b>More</b> action link and select <b>Remove From Favorites</b> to remove the report from Favorites.</p> <p><i>Figure 38: More Drop-Down Menu with Remove from Favorites Highlighted</i></p> 

**Notes:**

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## 5.5. Basic Navigation: Exercise

### *Exercise 5.1: Add a Report to Favorites*

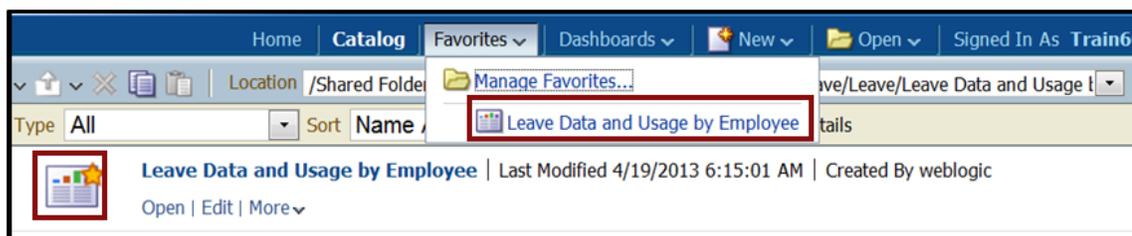
**Scenario:** John wants to add the Leave Data and Usage by Employee report to his Favorites so he can easily access it for his weekly report to leadership.

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

1. Sign in to the *Insight* training environment using the provided training ID and password.
2. Click the **Catalog** action link from the top navigation bar.
3. Expand the **Shared Folders** and navigate to the desired report by expanding the following folders: Shared Folders >> Common Report Library >> Compensation >> Leave >> Leave >> Leave Data and Usage by Employee.
  - a. Click the **Leave Data and Usage by Employee folder** to show folder contents in the view pane.
4. Click the **More** action link that corresponds to Leave Data and Usage by Employee report.
5. Select **Add to Favorites**.
6. Click the **Favorites** action link from the top navigation bar to validate the report has been added.

### Check Your Work:

*Figure 39: Leave Data and Usage by Employee Report Added to Favorites*



## 5.6. Chapter Review

### *Chapter Summary*

Having completed this chapter, you are now able to:

- Describe *Insight* key terms
- Demonstrate *Insight* sign in and basic navigation
- Describe structure of *Insight* My Folders and Shared Folders

### **Notes:**

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## 6.0. Access Reports

### 6.1. Chapter Overview

This chapter will review how users can access a report in the Catalog to run, export, print, and schedule.

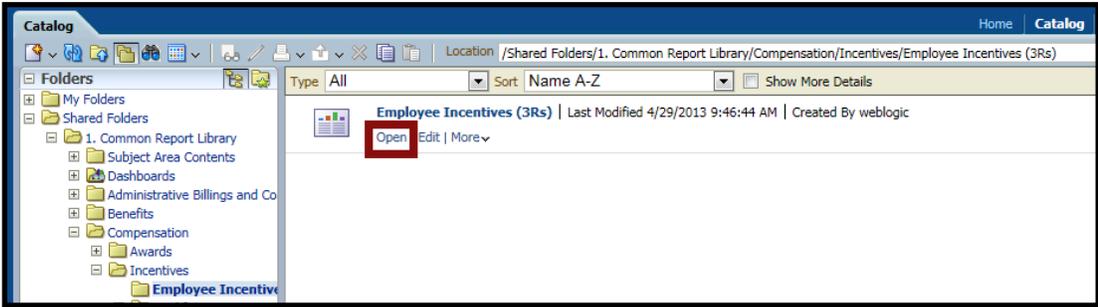
#### Chapter Objectives

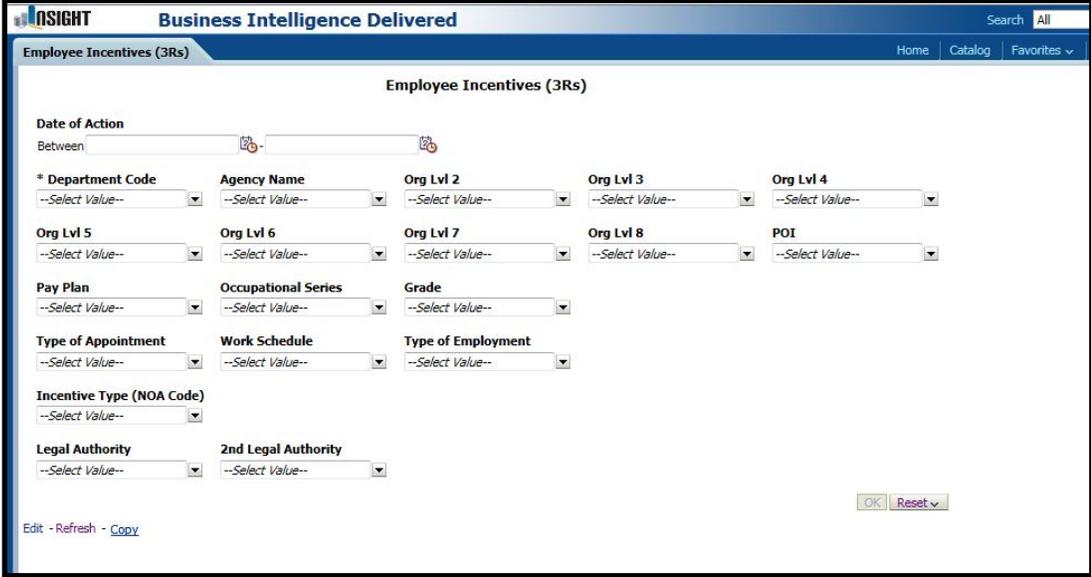
By the end of this chapter, you will be able to:

- Demonstrate how to run a report from the Common Report Library
- Demonstrate how to manipulate report appearance in run mode
- Demonstrate how to export and print a report
- Demonstrate how to schedule a report to run

### 6.2. Run a Report

#### Open a Report

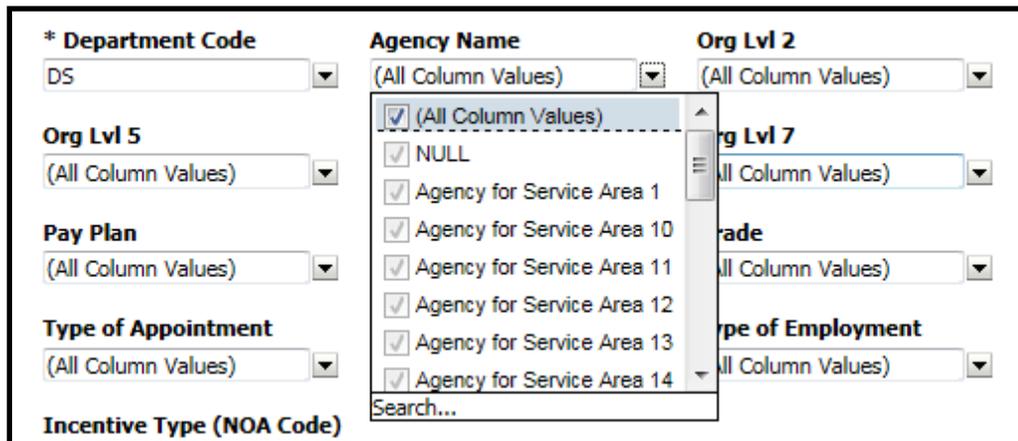
Step	Action
1.	<p>Click the <b>Open</b> action link below the desired report.</p> <p style="text-align: center;"><i>Figure 40: Open Action Link</i></p> 
	<p><b>TIP:</b> When navigating through folders within the Folders pane, you must click the folder name to see the list of folder contents.</p>

Step	Action
2.	<p>Navigate to the <b>Prompts</b> page. Many of the reports within the Common Report Library will contain a series of report prompts which allow the user to restrict data in a report each time it runs.</p> <p style="text-align: center;"><i>Figure 41: Report Prompt Page</i></p> 
	<p><b>IMPORTANT:</b> Report prompts distinguished by an asterisk (*) indicate a mandatory field; users <i>must</i> make a selection.</p>

Step	Action
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3. Use report prompts to restrict the data within a report. Users will interact with two different types of report prompts based on the type of data: drop-down and calendar.
- Drop-Down:** Select from a list of potential values or type the selection directly into the values box.

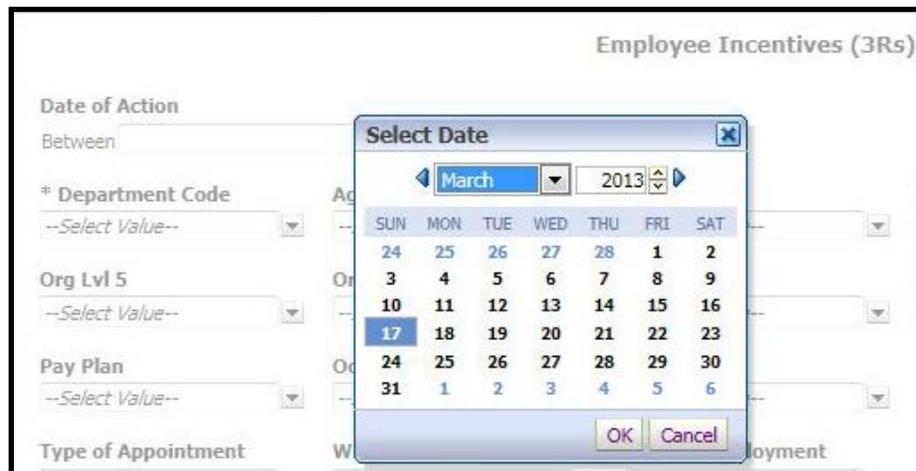
Figure 42: Drop-Down Prompt



The screenshot shows a report prompt form with several dropdown menus. The 'Agency Name' dropdown is open, displaying a list of options including '(All Column Values)', 'NULL', and 'Agency for Service Area 1' through '14'. Other dropdowns include 'Department Code' (DS), 'Org Lvl 2', 'Org Lvl 5', 'Pay Plan', 'Type of Appointment', 'Incentive Type (NOA Code)', 'Org Lvl 7', 'Grade', and 'Type of Employment', all currently set to '(All Column Values)'.

- Calendar:** Select the date (month, day, year) from a Calendar View.

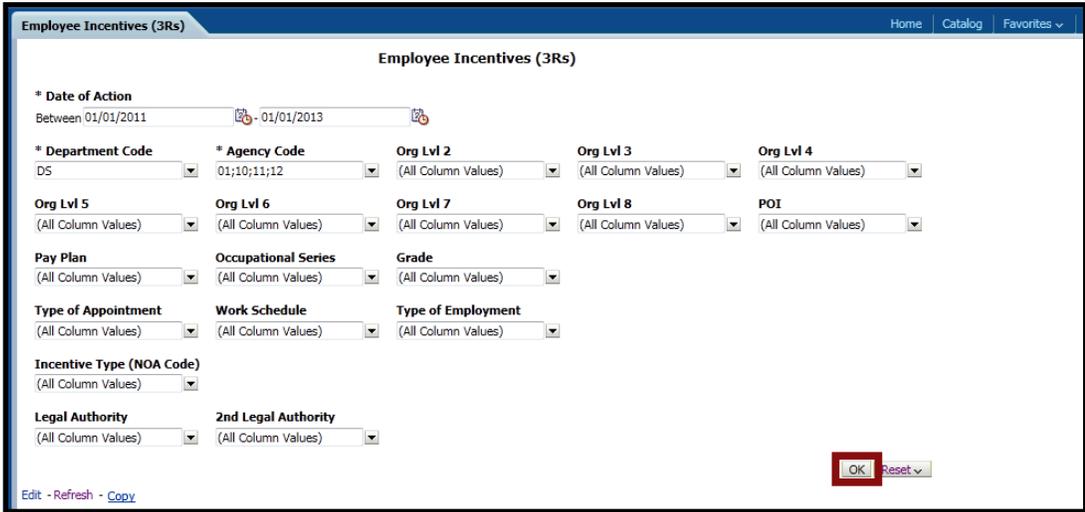
Figure 43: Calendar Prompt

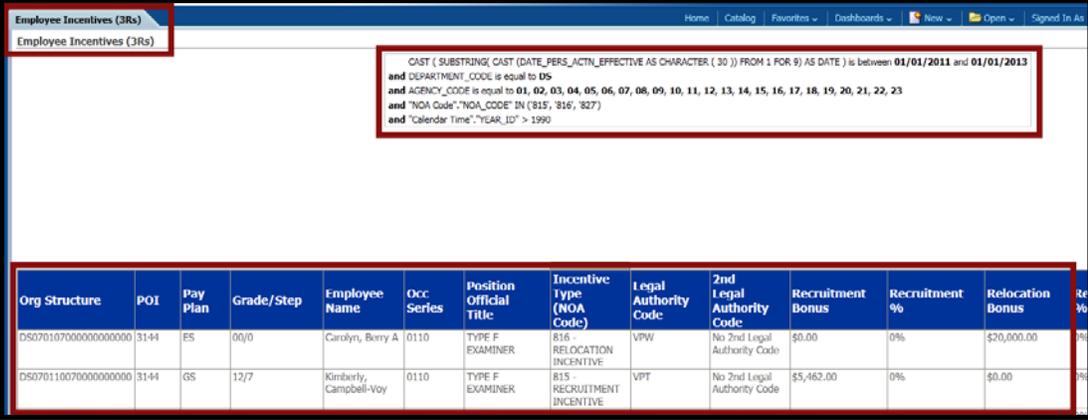


The screenshot shows a report prompt form titled 'Employee Incentives (3Rs)'. A 'Date of Action' prompt is active, with a 'Select Date' calendar pop-up. The calendar shows the month of March 2013, with the 17th selected. The background form has several dropdown menus, some of which are currently disabled or show '--Select Value--'.



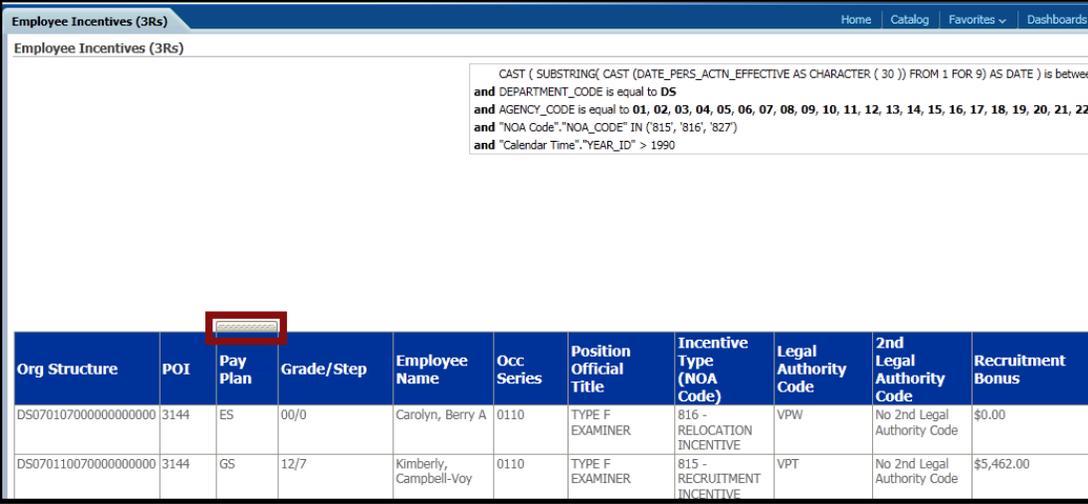
**TIP:** Some drop-down prompts will cascade based on user selection. For example, as a user selects Department, Agency Name will update to only the available agencies within the selected department.

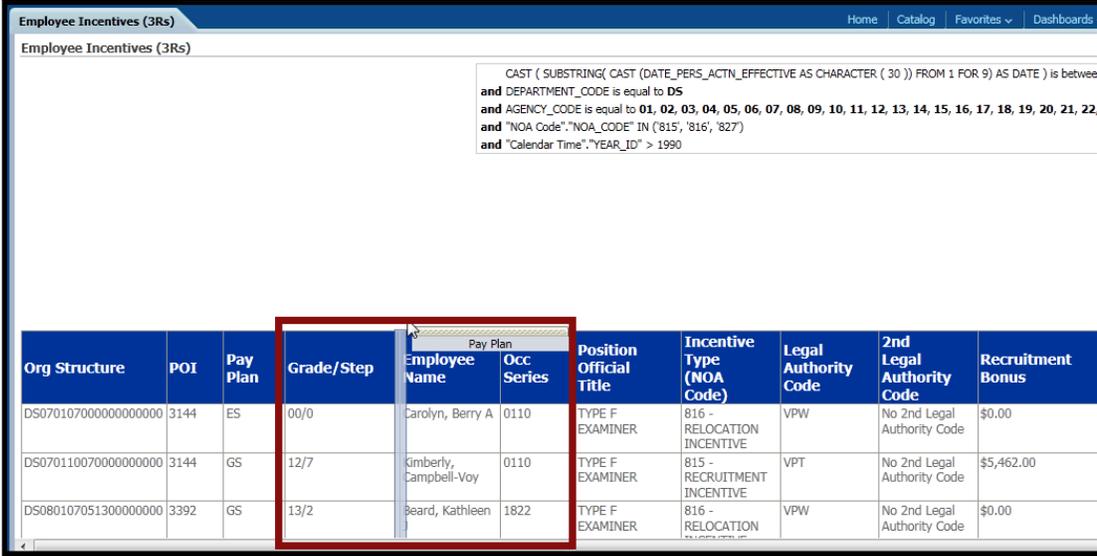
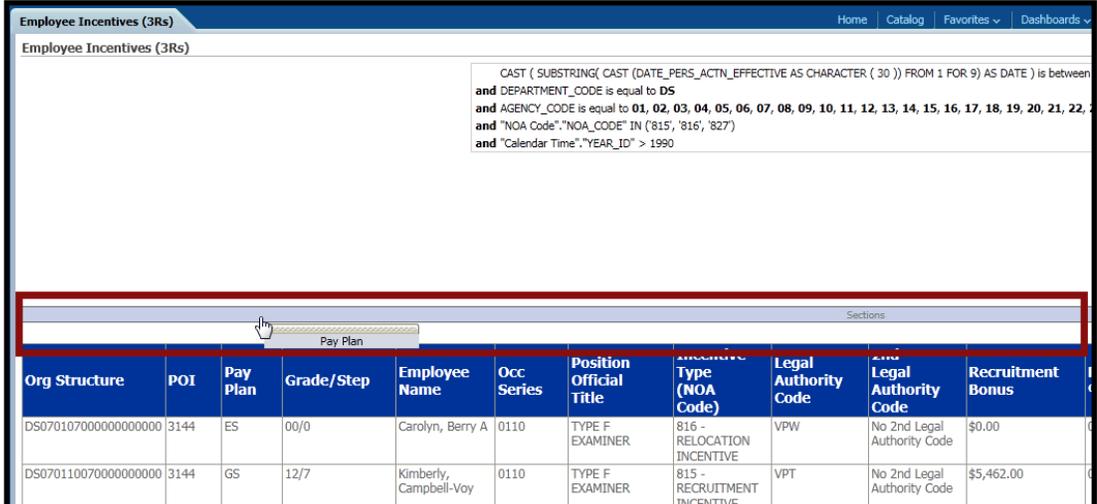
Step	Action
	<p><b>TIP:</b> After making selections in a drop-down prompt, click in the white space of the prompts page to accept the selections.</p>
	<p><b>IMPORTANT:</b> Reports that use time prompts, such as the calendar, contain historical data which allow users to restrict the date range based on prompt selections.</p>
<p>4.</p>	<p>Click <b>OK</b> to run the report.</p> <p style="text-align: center;"><i>Figure 44: Report Prompt Page with OK Highlighted</i></p> <div data-bbox="337 674 1422 1186" style="border: 1px solid black; padding: 5px;">  </div>
	<p><b>TIP:</b> Select Reset to return all report prompts to the default view.</p>

Step	Action																																							
5.	<p>View the Report in the run view with the report name in the tab at the top left corner of the page. The report table, graph, or other report components populate based on restrictions applied by the report prompts.</p> <p style="text-align: center;"><i>Figure 45: Report Run View</i></p>  <table border="1"> <thead> <tr> <th>Org Structure</th> <th>POI</th> <th>Pay Plan</th> <th>Grade/Step</th> <th>Employee Name</th> <th>Occ Series</th> <th>Position Official Title</th> <th>Incentive Type (NOA Code)</th> <th>Legal Authority Code</th> <th>2nd Legal Authority Code</th> <th>Recruitment Bonus</th> <th>Recruitment %</th> <th>Relocation Bonus</th> </tr> </thead> <tbody> <tr> <td>DS070107000000000000</td> <td>3144</td> <td>ES</td> <td>00/0</td> <td>Carolyn, Berry A</td> <td>0110</td> <td>TYPE F EXAMINER</td> <td>816 - RELOCATION INCENTIVE</td> <td>VPW</td> <td>No 2nd Legal Authority Code</td> <td>\$0.00</td> <td>0%</td> <td>\$20,000.00</td> </tr> <tr> <td>DS070110070000000000</td> <td>3144</td> <td>GS</td> <td>12/7</td> <td>Kimberly, Campbell-Voy</td> <td>0110</td> <td>TYPE F EXAMINER</td> <td>815 - RECRUITMENT INCENTIVE</td> <td>VPT</td> <td>No 2nd Legal Authority Code</td> <td>\$5,462.00</td> <td>0%</td> <td>\$0.00</td> </tr> </tbody> </table>	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 %	Relocation Bonus	DS070107000000000000	3144	ES	00/0	Carolyn, Berry A	0110	TYPE F EXAMINER	816 - RELOCATION INCENTIVE	VPW	No 2nd Legal Authority Code	\$0.00	0%	\$20,000.00	DS070110070000000000	3144	GS	12/7	Kimberly, Campbell-Voy	0110	TYPE F EXAMINER	815 - RECRUITMENT INCENTIVE	VPT	No 2nd Legal Authority Code	\$5,462.00	0%	\$0.00
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 %	Relocation Bonus																												
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### 6.3. Manipulate Reports

#### Manipulate a Report After it Runs

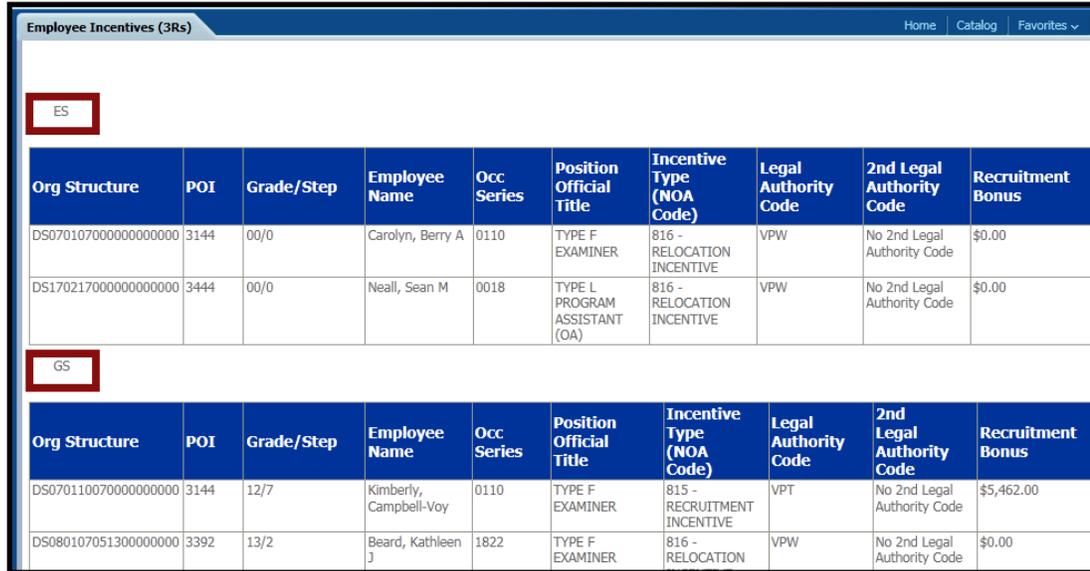
Step	Action																																	
1.	<p>Hold the cursor over a column heading to view the gray handle bar.</p> <p style="text-align: center;"><i>Figure 46: Gray Handle Bar</i></p>  <table border="1"> <thead> <tr> <th>Org Structure</th> <th>POI</th> <th>Pay Plan</th> <th>Grade/Step</th> <th>Employee Name</th> <th>Occ Series</th> <th>Position Official Title</th> <th>Incentive Type (NOA Code)</th> <th>Legal Authority Code</th> <th>2nd Legal Authority Code</th> <th>Recruitment Bonus</th> </tr> </thead> <tbody> <tr> <td>DS070107000000000000</td> <td>3144</td> <td>ES</td> <td>00/0</td> <td>Carolyn, Berry A</td> <td>0110</td> <td>TYPE F EXAMINER</td> <td>816 - RELOCATION INCENTIVE</td> <td>VPW</td> <td>No 2nd Legal Authority Code</td> <td>\$0.00</td> </tr> <tr> <td>DS070110070000000000</td> <td>3144</td> <td>GS</td> <td>12/7</td> <td>Kimberly, Campbell-Voy</td> <td>0110</td> <td>TYPE F EXAMINER</td> <td>815 - RECRUITMENT INCENTIVE</td> <td>VPT</td> <td>No 2nd Legal Authority Code</td> <td>\$5,462.00</td> </tr> </tbody> </table>	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	DS070107000000000000	3144	ES	00/0	Carolyn, Berry A	0110	TYPE F EXAMINER	816 - RELOCATION INCENTIVE	VPW	No 2nd Legal Authority Code	\$0.00	DS070110070000000000	3144	GS	12/7	Kimberly, Campbell-Voy	0110	TYPE F EXAMINER	815 - RECRUITMENT INCENTIVE	VPT	No 2nd Legal Authority Code	\$5,462.00
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																								
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Step	Action
2.	<p>Drag and drop the handle bar left or right to change the order of the columns.</p> <p style="text-align: center;"><i>Figure 47: Gray Handle Bar and Light Blue Bar Indicator</i></p> 
	<p><b>TIP:</b> The light blue bar will indicate the new position of the column in the report. Use this to guide where to drag and drop the column.</p>
3.	<p>Drag the column up to create a new Section or Table Prompt.</p> <p style="text-align: center;"><i>Figure 48: Sections Blue Bar Indicator in Report</i></p> 

**Step** **Action**

- **Section:** Results in several tables separated by the individual values of the data element.

Figure 49: Table Sections in Report



**Employee Incentives (3Rs)** Home Catalog Favorites

ES

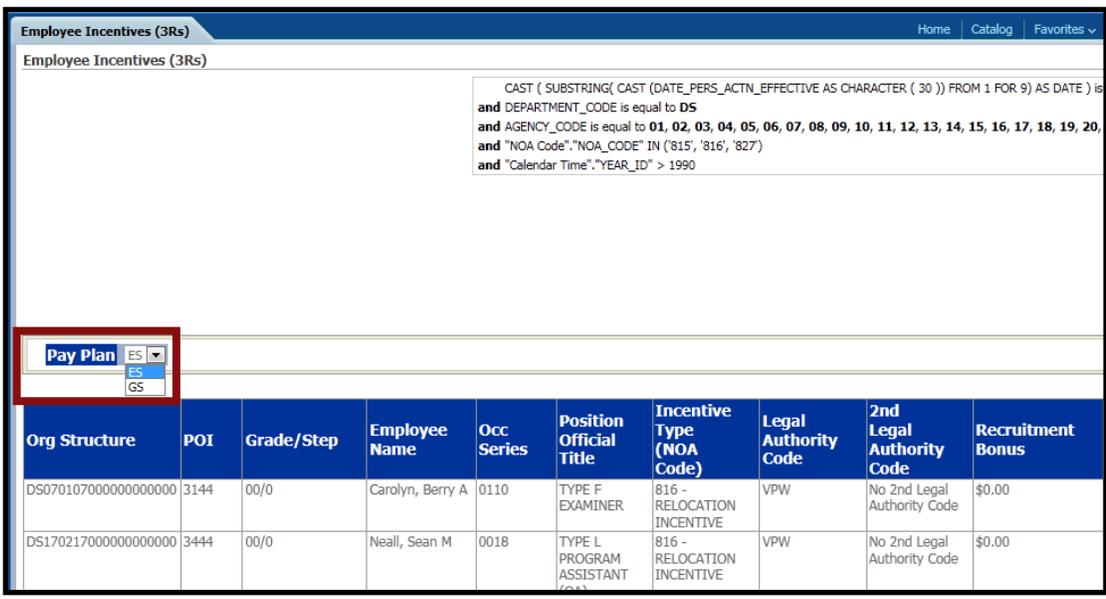
Org Structure	POI	Grade/Step	Employee Name	Occ Series	Position Official Title	Incentive Type (NOA Code)	Legal Authority Code	2nd Legal Authority Code	Recruitment Bonus
DS070107000000000000	3144	00/0	Carolyn, Berry A	0110	TYPE F EXAMINER	816 - RELOCATION INCENTIVE	VPW	No 2nd Legal Authority Code	\$0.00
DS170217000000000000	3444	00/0	Neall, Sean M	0018	TYPE L PROGRAM ASSISTANT (OA)	816 - RELOCATION INCENTIVE	VPW	No 2nd Legal Authority Code	\$0.00

GS

Org Structure	POI	Grade/Step	Employee Name	Occ Series	Position Official Title	Incentive Type (NOA Code)	Legal Authority Code	2nd Legal Authority Code	Recruitment Bonus
DS070110070000000000	3144	12/7	Kimberly, Campbell-Voy	0110	TYPE F EXAMINER	815 - RECRUITMENT INCENTIVE	VPT	No 2nd Legal Authority Code	\$5,462.00
DS080107051300000000	3392	13/2	Beard, Kathleen J	1822	TYPE F EXAMINER	816 - RELOCATION	VPW	No 2nd Legal Authority Code	\$0.00

- **Table Prompts:** Creates a drop-down menu that restricts the data in the table based on the selected value.

Figure 50: Table Prompts in a Report



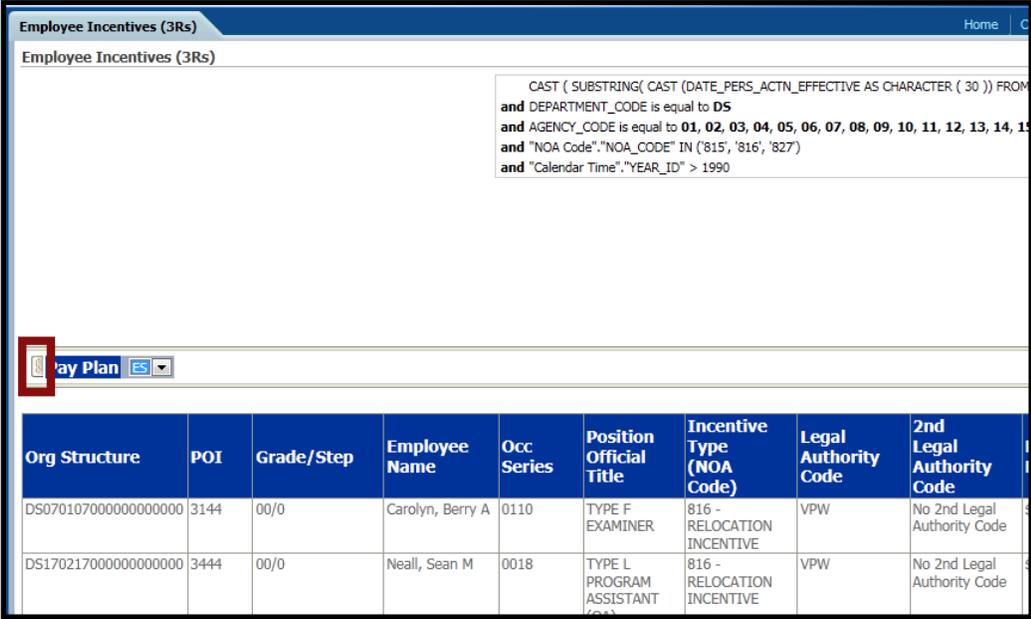
**Employee Incentives (3Rs)** Home Catalog Favorites

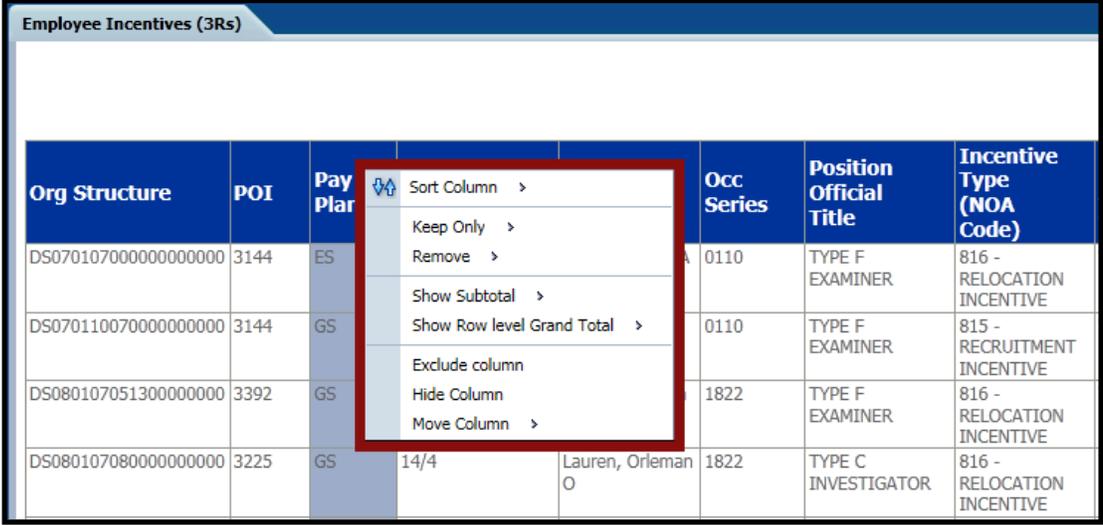
Employee Incentives (3Rs)

CAST ( SUBSTRING( CAST (DATE\_PERS\_ACTN\_EFFECTIVE AS CHARACTER ( 30 )) FROM 1 FOR 9) AS DATE ) is and DEPARTMENT\_CODE is equal to DS and AGENCY\_CODE is equal to 01, 02, 03, 04, 05, 06, 07, 08, 09, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, and "NOA Code"."NOA\_CODE" IN ('815', '816', '827') and "Calendar Time"."YEAR\_ID" > 1990

Pay Plan ES

Org Structure	POI	Grade/Step	Employee Name	Occ Series	Position Official Title	Incentive Type (NOA Code)	Legal Authority Code	2nd Legal Authority Code	Recruitment Bonus
DS070107000000000000	3144	00/0	Carolyn, Berry A	0110	TYPE F EXAMINER	816 - RELOCATION INCENTIVE	VPW	No 2nd Legal Authority Code	\$0.00
DS170217000000000000	3444	00/0	Neall, Sean M	0018	TYPE L PROGRAM ASSISTANT (OA)	816 - RELOCATION INCENTIVE	VPW	No 2nd Legal Authority Code	\$0.00

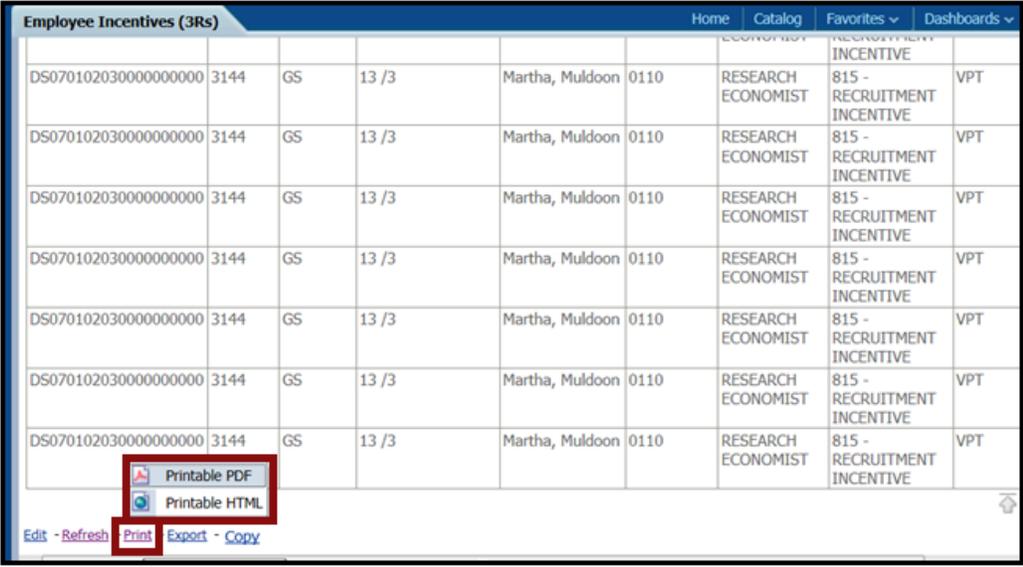
Step	Action																											
4.	<p data-bbox="332 300 1360 415">Return the data element from Section or Table Prompts to the table by hovering over the data element name and dragging the handle bar to the report table.</p> <p data-bbox="495 436 1269 468"><i>Figure 51: Gray Handle Bar to Remove Section or Table Prompts</i></p>  <p>The screenshot shows a web application interface for 'Employee Incentives (3Rs)'. It includes a search bar with a SQL query, a 'Play Plan' button, and a data table. A red box highlights a gray handle bar on the left side of the table's header row.</p> <table border="1" data-bbox="381 892 1388 1102"> <thead> <tr> <th>Org Structure</th> <th>POI</th> <th>Grade/Step</th> <th>Employee Name</th> <th>Occ Series</th> <th>Position Official Title</th> <th>Incentive Type (NOA Code)</th> <th>Legal Authority Code</th> <th>2nd Legal Authority Code</th> </tr> </thead> <tbody> <tr> <td>DS070107000000000000</td> <td>3144</td> <td>00/0</td> <td>Carolyn, Berry A</td> <td>0110</td> <td>TYPE F EXAMINER</td> <td>816 - RELOCATION INCENTIVE</td> <td>VPW</td> <td>No 2nd Legal Authority Code</td> </tr> <tr> <td>DS170217000000000000</td> <td>3444</td> <td>00/0</td> <td>Neall, Sean M</td> <td>0018</td> <td>TYPE L PROGRAM ASSISTANT</td> <td>816 - RELOCATION INCENTIVE</td> <td>VPW</td> <td>No 2nd Legal Authority Code</td> </tr> </tbody> </table>	Org Structure	POI	Grade/Step	Employee Name	Occ Series	Position Official Title	Incentive Type (NOA Code)	Legal Authority Code	2nd Legal Authority Code	DS070107000000000000	3144	00/0	Carolyn, Berry A	0110	TYPE F EXAMINER	816 - RELOCATION INCENTIVE	VPW	No 2nd Legal Authority Code	DS170217000000000000	3444	00/0	Neall, Sean M	0018	TYPE L PROGRAM ASSISTANT	816 - RELOCATION INCENTIVE	VPW	No 2nd Legal Authority Code
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Step	Action																																											
5.	<p>Right-click on a column header to view a menu of options allowing users to customize report structure.</p> <ul style="list-style-type: none"> <li>• <b>Sort Column:</b> Sort the data in ascending or descending order.</li> <li>• <b>Keep Only:</b> Choose to only show values that meet certain criteria.</li> <li>• <b>Remove:</b> Choose to remove values that meet certain criteria.</li> <li>• <b>Show Subtotal:</b> Add a subtotal for that data element within the table.</li> <li>• <b>Show Row Level Grand Total:</b> Add a Grand Total to follow the values within the table. Default is not to include the Grand Total.</li> <li>• <b>Exclude Column:</b> Remove the column from the table.</li> <li>• <b>Hide Column:</b> Temporarily hide the column from the table.</li> <li>• <b>Move Column:</b> Change the sequence of the columns or move the data element into the Table Prompts or Sections position.</li> </ul> <p style="text-align: center;"><i>Figure 52: Column Header Drop-Down Menu</i></p>  <table border="1" data-bbox="332 1008 1435 1533"> <thead> <tr> <th colspan="8" data-bbox="332 1008 1435 1039">Employee Incentives (3Rs)</th> </tr> <tr> <th data-bbox="354 1150 560 1249">Org Structure</th> <th data-bbox="560 1150 641 1249">POI</th> <th data-bbox="641 1150 722 1249">Pay Plan</th> <th data-bbox="722 1150 885 1249"></th> <th data-bbox="885 1150 1031 1249">Occ Series</th> <th data-bbox="1031 1150 1282 1249">Position Official Title</th> <th data-bbox="1282 1150 1435 1249">Incentive Type (NOA Code)</th> </tr> </thead> <tbody> <tr> <td data-bbox="354 1249 560 1312">DS070107000000000000</td> <td data-bbox="560 1249 641 1312">3144</td> <td data-bbox="641 1249 722 1312">ES</td> <td data-bbox="722 1249 885 1312"></td> <td data-bbox="885 1249 1031 1312">0110</td> <td data-bbox="1031 1249 1282 1312">TYPE F EXAMINER</td> <td data-bbox="1282 1249 1435 1312">816 - RELOCATION INCENTIVE</td> </tr> <tr> <td data-bbox="354 1312 560 1375">DS070110070000000000</td> <td data-bbox="560 1312 641 1375">3144</td> <td data-bbox="641 1312 722 1375">GS</td> <td data-bbox="722 1312 885 1375"></td> <td data-bbox="885 1312 1031 1375">0110</td> <td data-bbox="1031 1312 1282 1375">TYPE F EXAMINER</td> <td data-bbox="1282 1312 1435 1375">815 - RECRUITMENT INCENTIVE</td> </tr> <tr> <td data-bbox="354 1375 560 1438">DS080107051300000000</td> <td data-bbox="560 1375 641 1438">3392</td> <td data-bbox="641 1375 722 1438">GS</td> <td data-bbox="722 1375 885 1438"></td> <td data-bbox="885 1375 1031 1438">1822</td> <td data-bbox="1031 1375 1282 1438">TYPE F EXAMINER</td> <td data-bbox="1282 1375 1435 1438">816 - RELOCATION INCENTIVE</td> </tr> <tr> <td data-bbox="354 1438 560 1533">DS080107080000000000</td> <td data-bbox="560 1438 641 1533">3225</td> <td data-bbox="641 1438 722 1533">GS</td> <td data-bbox="722 1438 885 1533">14/4</td> <td data-bbox="885 1438 1031 1533">Lauren, Orleman O</td> <td data-bbox="1031 1438 1282 1533">1822 TYPE C INVESTIGATOR</td> <td data-bbox="1282 1438 1435 1533">816 - RELOCATION INCENTIVE</td> </tr> </tbody> </table>	Employee Incentives (3Rs)								Org Structure	POI	Pay Plan		Occ Series	Position Official Title	Incentive Type (NOA Code)	DS070107000000000000	3144	ES		0110	TYPE F EXAMINER	816 - RELOCATION INCENTIVE	DS070110070000000000	3144	GS		0110	TYPE F EXAMINER	815 - RECRUITMENT INCENTIVE	DS080107051300000000	3392	GS		1822	TYPE F EXAMINER	816 - RELOCATION INCENTIVE	DS080107080000000000	3225	GS	14/4	Lauren, Orleman O	1822 TYPE C INVESTIGATOR	816 - RELOCATION INCENTIVE
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## Export a Report

Step	Action
1.	<p>Click the <b>Export</b> action link to choose from a number of export options including <i>PDF</i>, <i>Excel</i>, <i>PowerPoint</i>, <i>Web Archive</i>, or <i>Data</i>.</p> <p style="text-align: center;"><i>Figure 53: Export Action Link Drop-Down Menu</i></p>  <p>The screenshot shows a table with columns for ID, Name, Position, and Department. The 'Export' button in the toolbar is highlighted with a red box, and a dropdown menu is open showing options: PDF, Excel, Powerpoint, Web Archive (.mht), and Data.</p> <ul style="list-style-type: none"> <li>• The Export feature in <i>Insight</i> has several overall requirements:             <ul style="list-style-type: none"> <li>○ Files must be 20 MB or less, or approximately 100,000 rows or less.</li> <li>○ Java and ActiveX are required to display the File Download dialog box.</li> <li>○ Pop-ups must be allowed.</li> <li>○ Maximum number of rows per page must be displayed (500).</li> </ul> </li> <li>• Some file types also have specific restrictions:             <ul style="list-style-type: none"> <li>○ <b>PDF:</b> Prints only what is displayed on one page. Users can elect to see all the rows by maximizing the row count displayed.</li> <li>○ <b>Excel:</b> 2003 version has a limit of 65,536 rows. When exporting a dashboard, the report is saved in HTML format where Excel will automatically position the graphs.</li> <li>○ <b>PowerPoint:</b> 2003 and 2007 versions print the dashboard to multiple slides, with each dashboard page on one slide.</li> </ul> </li> </ul>

## Print a Report

Step	Action																																																																								
1.	<p>Click the <b>Print</b> action link and choose from <i>Printable PDF</i> or <i>Printable HTML</i>.</p> <p><i>Figure 54: Print Action Link Drop-Down Menu</i></p>  <p>The screenshot shows a table with the following data:</p> <table border="1"> <thead> <tr> <th>Employee ID</th> <th>Agency</th> <th>Grade</th> <th>Start Date</th> <th>End Date</th> <th>Position</th> <th>Job Title</th> <th>Job Code</th> <th>Job Category</th> </tr> </thead> <tbody> <tr> <td>DS070102030000000000</td> <td>3144</td> <td>GS</td> <td>13 / 3</td> <td></td> <td>Martha, Muldoon</td> <td>0110</td> <td>RESEARCH ECONOMIST</td> <td>815 - RECRUITMENT INCENTIVE</td> </tr> <tr> <td>DS070102030000000000</td> <td>3144</td> <td>GS</td> <td>13 / 3</td> <td></td> <td>Martha, Muldoon</td> <td>0110</td> <td>RESEARCH ECONOMIST</td> <td>815 - RECRUITMENT INCENTIVE</td> </tr> <tr> <td>DS070102030000000000</td> <td>3144</td> <td>GS</td> <td>13 / 3</td> <td></td> <td>Martha, Muldoon</td> <td>0110</td> <td>RESEARCH ECONOMIST</td> <td>815 - RECRUITMENT INCENTIVE</td> </tr> <tr> <td>DS070102030000000000</td> <td>3144</td> <td>GS</td> <td>13 / 3</td> <td></td> <td>Martha, Muldoon</td> <td>0110</td> <td>RESEARCH ECONOMIST</td> <td>815 - RECRUITMENT INCENTIVE</td> </tr> <tr> <td>DS070102030000000000</td> <td>3144</td> <td>GS</td> <td>13 / 3</td> <td></td> <td>Martha, Muldoon</td> <td>0110</td> <td>RESEARCH ECONOMIST</td> <td>815 - RECRUITMENT INCENTIVE</td> </tr> <tr> <td>DS070102030000000000</td> <td>3144</td> <td>GS</td> <td>13 / 3</td> <td></td> <td>Martha, Muldoon</td> <td>0110</td> <td>RESEARCH ECONOMIST</td> <td>815 - RECRUITMENT INCENTIVE</td> </tr> <tr> <td>DS070102030000000000</td> <td>3144</td> <td>GS</td> <td>13 / 3</td> <td></td> <td>Martha, Muldoon</td> <td>0110</td> <td>RESEARCH ECONOMIST</td> <td>815 - RECRUITMENT INCENTIVE</td> </tr> </tbody> </table>	Employee ID	Agency	Grade	Start Date	End Date	Position	Job Title	Job Code	Job Category	DS070102030000000000	3144	GS	13 / 3		Martha, Muldoon	0110	RESEARCH ECONOMIST	815 - RECRUITMENT INCENTIVE	DS070102030000000000	3144	GS	13 / 3		Martha, Muldoon	0110	RESEARCH ECONOMIST	815 - RECRUITMENT INCENTIVE	DS070102030000000000	3144	GS	13 / 3		Martha, Muldoon	0110	RESEARCH ECONOMIST	815 - RECRUITMENT INCENTIVE	DS070102030000000000	3144	GS	13 / 3		Martha, Muldoon	0110	RESEARCH ECONOMIST	815 - RECRUITMENT INCENTIVE	DS070102030000000000	3144	GS	13 / 3		Martha, Muldoon	0110	RESEARCH ECONOMIST	815 - RECRUITMENT INCENTIVE	DS070102030000000000	3144	GS	13 / 3		Martha, Muldoon	0110	RESEARCH ECONOMIST	815 - RECRUITMENT INCENTIVE	DS070102030000000000	3144	GS	13 / 3		Martha, Muldoon	0110	RESEARCH ECONOMIST	815 - RECRUITMENT INCENTIVE
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	<p><b>IMPORTANT:</b> To open a PDF, users must have Adobe installed.</p>																																																																								

### Notes:

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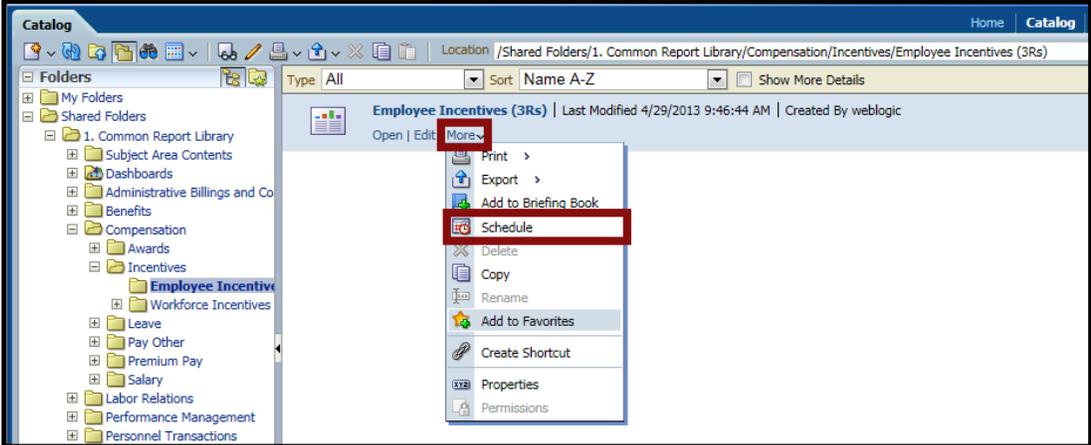
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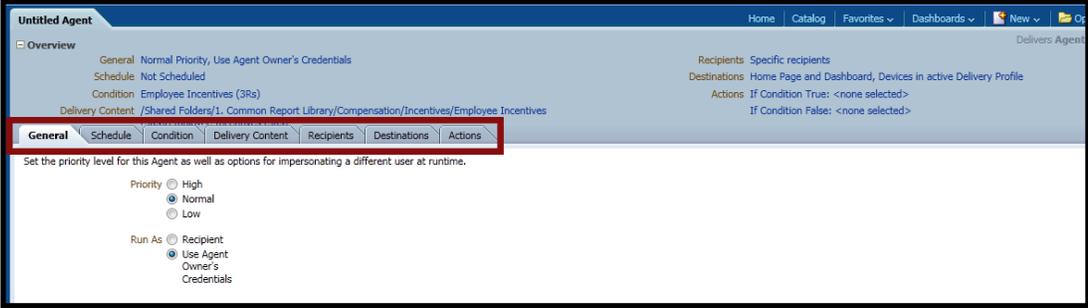


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## 6.4. Schedule Reports to Run

### Use the Scheduler Agent

Step	Action
1.	<p>Navigate to the desired report and click the corresponding <b>More</b> action link. Select <b>Schedule</b> from the menu of options.</p> <p><i>Figure 55: More Action Link Drop-Down Menu with Schedule Highlighted</i></p>  <p> <b>Schedule:</b> Programs a report to run at a certain time and/or frequency.</p>

Step	Action
2.	<p>View the <b>New Scheduler</b> page to customize the Scheduler using the following seven tabs:</p> <ul style="list-style-type: none"> <li>• <b>General:</b> Allows users to set the priority of the report.</li> <li>• <b>Schedule:</b> Allows users to define the frequency, start, and end time of the agent.</li> <li>• <b>Condition:</b> Provides users the ability to set conditions for the Scheduler to run based on characteristics of another report in the Catalog.</li> <li>• <b>Delivery Content:</b> Identifies the delivery type.</li> <li>• <b>Recipients:</b> Provides users the ability to identify the recipient of the run report.</li> <li>• <b>Destinations:</b> Allows users to choose the location to which the report will be delivered.</li> <li>• <b>Actions:</b> Provides users the ability to specify actions to take once the Scheduler runs.</li> </ul> <p style="text-align: center;"><i>Figure 56: New Scheduler Page and Tabs</i></p> 
	<p><b>TIP:</b> As selections are made within each of the New Scheduler tabs, the Overview section will populate with the user's selection.</p>



*Exercise 6.2: Run, Manipulate, and Export a Common Report*

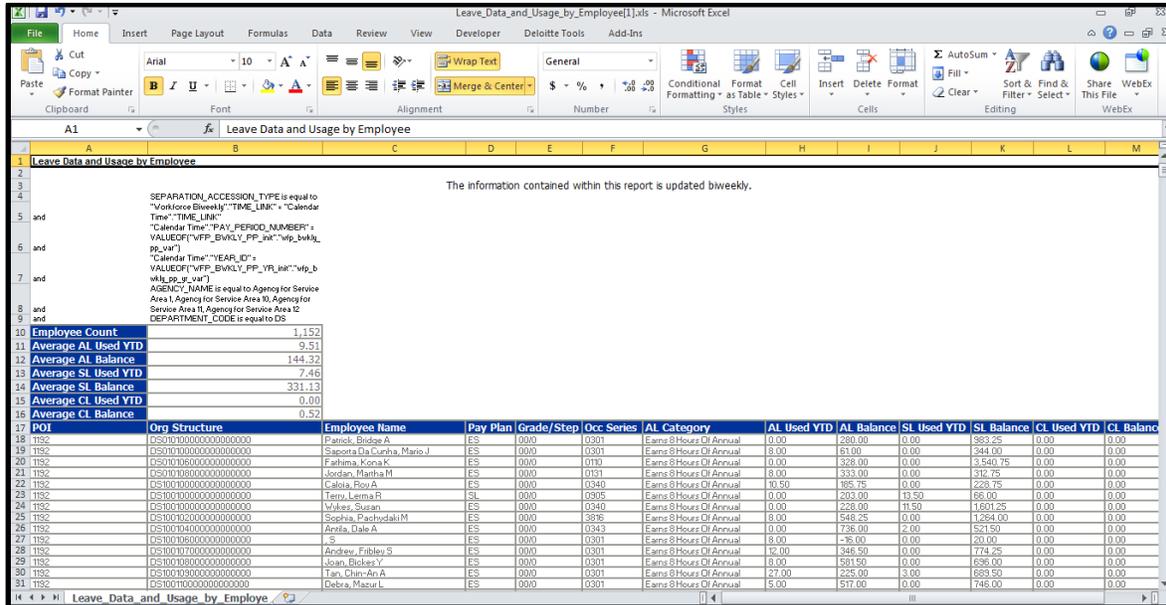
**Scenario:** Ivan's manager has requested a copy of the Leave and Data Usage by Employee report, but Ivan needs to make small edits to the structure before he shares it.

**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 >> Compensation >> Leave >> Leave >> Leave Data and Usage by Employee.
  - a. Click the **Leave Data and Usage by Employee folder** to show folder contents.
3. Click the **Open** action link corresponding to Leave Data and Usage by Employee report.
4. From the Leave Data and Usage by Employee report prompts page, select the following prompt values:
  - a. Department Code: DS
  - b. Agency Code: 01, 10, 11, 12
5. Click **OK**.
6. Hover over the Org Structure column heading until the gray handle bar appears at the top of the column.
7. Click on the gray handle bar and drag the Org Structure column one space to the right so that it follows POI.
8. Right-click the Grade/Step column heading and select **Sort Column**, then **Sort Ascending**.
9. Click the **Export** link to open a menu of export options.
10. Select **Excel** from the drop-down menu to export the report as an Excel file.

## Check Your Work:

Figure 58: Customized Report Exported to Excel



The screenshot shows an Excel spreadsheet with the following data:

POI	Org Structure	Employee Name	Pay Plan	Grade/Step	Oce Series	AL Category	AL Used YTD	AL Balance	SL Used YTD	SL Balance	CL Used YTD	CL Balance
18	05010000000000000000	Patrick, Bridget A	ES	0010	0301	Earns 8 Hours Of Annual	0.00	280.00	0.00	883.25	0.00	0.00
19	05010000000000000000	Sapota Da Cunha, Mario J	ES	0010	0301	Earns 8 Hours Of Annual	8.00	61.00	0.00	344.00	0.00	0.00
20	05010000000000000000	Fakhira, Kona K	ES	0010	0110	Earns 8 Hours Of Annual	0.00	328.00	0.00	3,540.75	0.00	0.00
21	05010000000000000000	Jordan, Maritza M	ES	0010	0151	Earns 8 Hours Of Annual	8.00	333.00	0.00	312.75	0.00	0.00
22	05010000000000000000	Calista, Row A	ES	0010	0340	Earns 8 Hours Of Annual	10.50	195.75	0.00	228.75	0.00	0.00
23	05010000000000000000	Terru, Lema R	SL	0010	0305	Earns 8 Hours Of Annual	0.00	203.00	13.50	66.00	0.00	0.00
24	05010000000000000000	Whites, Susan	ES	0010	0340	Earns 8 Hours Of Annual	0.00	228.00	11.50	1,601.25	0.00	0.00
25	05010000000000000000	Sochka, Panchadali M	ES	0010	3316	Earns 8 Hours Of Annual	8.00	548.25	0.00	1,254.00	0.00	0.00
26	05010000000000000000	Azeite, Dale A	ES	0010	0343	Earns 8 Hours Of Annual	0.00	736.00	2.00	521.50	0.00	0.00
27	05010000000000000000	S	ES	0010	0301	Earns 8 Hours Of Annual	8.00	-75.00	0.00	20.00	0.00	0.00
28	05010000000000000000	Andrew, Fabrice S	ES	0010	0301	Earns 8 Hours Of Annual	12.00	348.50	0.00	1,774.25	0.00	0.00
29	05010000000000000000	Joan, Blaise Y	ES	0010	0301	Earns 8 Hours Of Annual	8.00	581.50	0.00	636.00	0.00	0.00
30	05010000000000000000	Tan, Chin-An A	ES	0010	0301	Earns 8 Hours Of Annual	27.00	225.00	3.00	689.50	0.00	0.00
31	05010000000000000000	Debas, Masul L	ES	0010	0301	Earns 8 Hours Of Annual	5.00	517.00	0.00	748.00	0.00	0.00

## 6.6. Chapter Review

### Chapter Summary

Having completed this chapter, you are now able to:

- Demonstrate how to run a report from the Common Report Library
- Demonstrate how to manipulate report appearance in run mode
- Demonstrate how to export and print a report
- Demonstrate how to schedule a report to run

### Notes:

## 7.0. Access Dashboards

### 7.1. Chapter Overview

This chapter will review how *Insight* users can run a dashboard to see the “30,000 foot view” of their data.

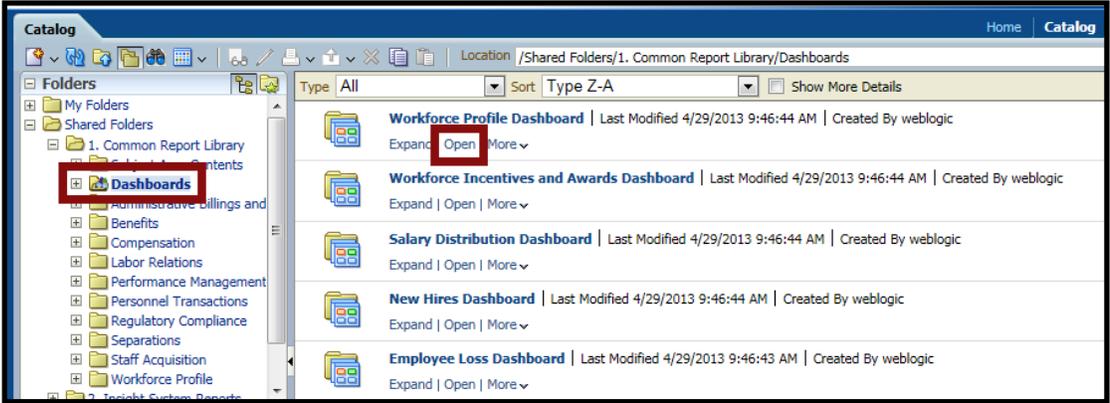
#### Chapter Objectives

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

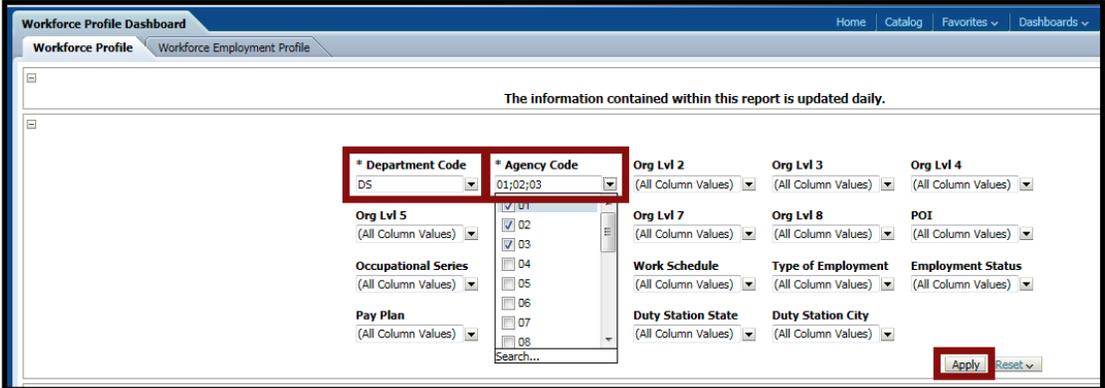
- Demonstrate how to access a dashboard
- Demonstrate how to drill-down within a dashboard
- Demonstrate how to export and print a dashboard

### 7.2. Run a Dashboard

#### Open a Dashboard to Run Results

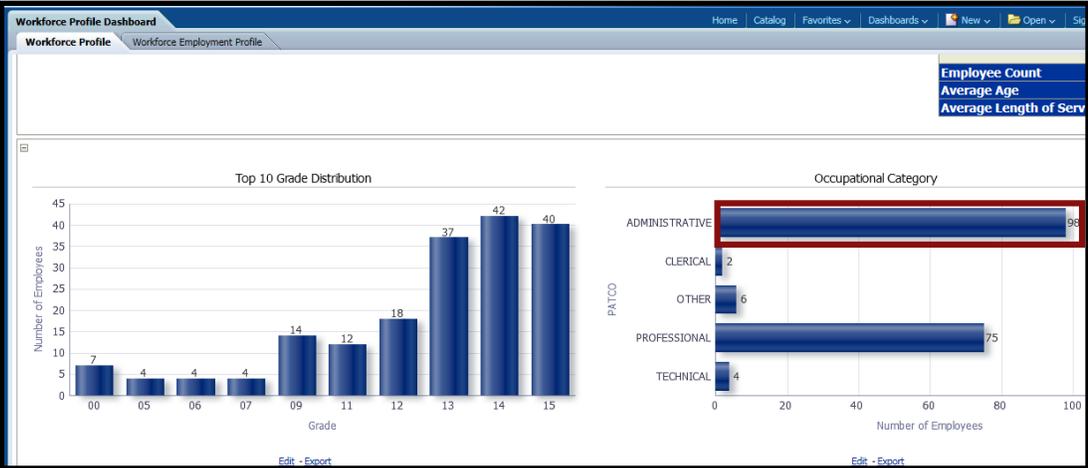
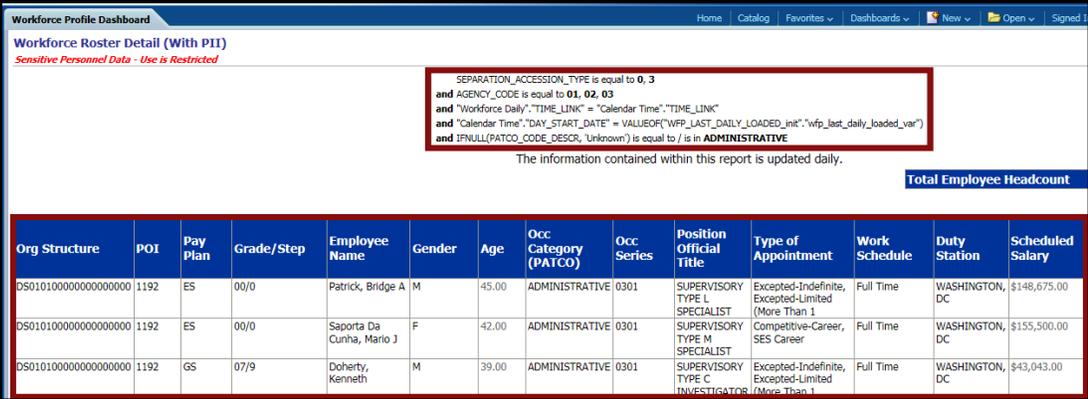
Step	Action
1.	<p>Navigate to the Dashboards folder within the Common Report Library. Click the <b>Open</b> action link corresponding to the desired dashboard.</p> <p style="text-align: center;"><i>Figure 59: Open Action Link</i></p> 
	<p><b>TIP:</b> Clicking the Expand action link will reveal each individual component of the dashboard (not recommended). Users should click the Open action link to run the dashboard.</p>
	<p><b>TIP:</b> Common dashboards can also be accessed from the Dashboards action link in the top navigation bar.</p>



Step	Action
3.	<p>Select the data to display in the dashboard reports by using the dashboard prompts at the top of the dashboard page.</p> <p style="text-align: center;"><i>Figure 61: Dashboard Prompt Drop-Down Menu</i></p> 
	<p><b>IMPORTANT:</b> Reports or dashboards containing a current snapshot will include a disclaimer identifying whether the data is updated daily or bi-weekly.</p>
	<p><b>TIP:</b> If the user selects a dataset that is too limited, an error message appears that the “specified criteria didn’t result in any data.” Use the reset button to return the prompts to default values.</p>
4.	<p>Click <b>Apply</b> and the dashboard reports will update based on the selections made.</p> <p style="text-align: center;"><i>Figure 62: Dashboard Reports</i></p> 

### 7.3. Drill-Down in a Dashboard

#### Use the Drill-Down Functionality to View Details

Step	Action																																																								
1.	<p>Click on any component of a graph to drill-down to a respective data set.</p> <p style="text-align: center;"><i>Figure 63: Graph Drill-Down Capability</i></p> 																																																								
2.	<p>View a new page with an operational report filtered by the data selected in the graph.</p> <p style="text-align: center;"><i>Figure 64: Operational Report with Data Filtered from Graph Drill-Down</i></p>  <p style="text-align: center;"><i>SEPARATION_ACCESSION_TYPE is equal to 0, 3 and AGENCY_CODE is equal to 01, 02, 03 and "Workforce Daily"."TIME_LINK" = "Calendar Time"."TIME_LINK" and "Calendar Time"."DAY_START_DATE" = VALUEOF("WFP_LAST_DAILY_LOADED_init"."wfp_last_daily_loaded_var") and IFNULL(PATCO_CODE_DESCR, 'Unknown') is equal to / is in ADMINISTRATIVE</i></p> <p style="text-align: right;">Total Employee Headcount</p> <table border="1" data-bbox="345 1386 1417 1570"> <thead> <tr> <th>Org Structure</th> <th>POI</th> <th>Pay Plan</th> <th>Grade/Step</th> <th>Employee Name</th> <th>Gender</th> <th>Age</th> <th>Occ Category (PATCO)</th> <th>Occ Series</th> <th>Position Official Title</th> <th>Type of Appointment</th> <th>Work Schedule</th> <th>Duty Station</th> <th>Scheduled Salary</th> </tr> </thead> <tbody> <tr> <td>DS01010000000000000000</td> <td>1192</td> <td>ES</td> <td>00/0</td> <td>Patrick, Bridge A</td> <td>M</td> <td>45.00</td> <td>ADMINISTRATIVE</td> <td>0301</td> <td>SUPERVISORY TYPE L SPECIALIST</td> <td>Excepted-Indefinite, Excepted-Limited (More Than 1)</td> <td>Full Time</td> <td>WASHINGTON, DC</td> <td>\$148,675.00</td> </tr> <tr> <td>DS01010000000000000000</td> <td>1192</td> <td>ES</td> <td>00/0</td> <td>Saporta Da Cunha, Mario J</td> <td>F</td> <td>42.00</td> <td>ADMINISTRATIVE</td> <td>0301</td> <td>SUPERVISORY TYPE M SPECIALIST</td> <td>Competitive-Career, SES Career</td> <td>Full Time</td> <td>WASHINGTON, DC</td> <td>\$155,500.00</td> </tr> <tr> <td>DS01010000000000000000</td> <td>1192</td> <td>GS</td> <td>07/9</td> <td>Doherty, Kenneth</td> <td>M</td> <td>39.00</td> <td>ADMINISTRATIVE</td> <td>0301</td> <td>SUPERVISORY TYPE C INVESTIGATOR</td> <td>Excepted-Indefinite, Excepted-Limited (More Than 1)</td> <td>Full Time</td> <td>WASHINGTON, DC</td> <td>\$43,043.00</td> </tr> </tbody> </table>	Org Structure	POI	Pay Plan	Grade/Step	Employee Name	Gender	Age	Occ Category (PATCO)	Occ Series	Position Official Title	Type of Appointment	Work Schedule	Duty Station	Scheduled Salary	DS01010000000000000000	1192	ES	00/0	Patrick, Bridge A	M	45.00	ADMINISTRATIVE	0301	SUPERVISORY TYPE L SPECIALIST	Excepted-Indefinite, Excepted-Limited (More Than 1)	Full Time	WASHINGTON, DC	\$148,675.00	DS01010000000000000000	1192	ES	00/0	Saporta Da Cunha, Mario J	F	42.00	ADMINISTRATIVE	0301	SUPERVISORY TYPE M SPECIALIST	Competitive-Career, SES Career	Full Time	WASHINGTON, DC	\$155,500.00	DS01010000000000000000	1192	GS	07/9	Doherty, Kenneth	M	39.00	ADMINISTRATIVE	0301	SUPERVISORY TYPE C INVESTIGATOR	Excepted-Indefinite, Excepted-Limited (More Than 1)	Full Time	WASHINGTON, DC	\$43,043.00
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	<p><b>TIP:</b> The Filters Record above the report will include the drill-down selection as one of the recorded filters in this view of data.</p>																																																								

Step	Action																																				
3.	<p>Click the <b>Return</b> action link at the bottom of the page to return to the summary level dashboard view.</p> <p style="text-align: center;"><i>Figure 65: Return Action Link in Drill-Down Report</i></p>  <p>The screenshot shows a table with the following data:</p> <table border="1"> <thead> <tr> <th>Employee ID</th> <th>Grade</th> <th>Position</th> <th>Name</th> <th>Rate</th> <th>Agency</th> <th>Position Code</th> <th>Job Title</th> <th>Employment Type</th> </tr> </thead> <tbody> <tr> <td>DS010108000000000000</td> <td>1192</td> <td>GS 14/3</td> <td>Zalman, Marvin J M</td> <td>41.00</td> <td>ADMINISTRATIVE</td> <td>1101</td> <td>SUPERVISORY TYPE C INVESTIGATOR</td> <td>Excepted-Indefinite, Excepted-Limited (More Than 1)</td> </tr> <tr> <td>DS010108000000000000</td> <td>1192</td> <td>GS 14/6</td> <td>Mildred, Fuller F</td> <td>64.00</td> <td>ADMINISTRATIVE</td> <td>0341</td> <td>SUPERVISORY TYPE L SPECIALIST</td> <td>Excepted-Indefinite, Excepted-Limited (More Than 1)</td> </tr> <tr> <td>DS010108010000000000</td> <td>1192</td> <td>GS 11/1</td> <td>Albrecht, Terrance C</td> <td>58.00</td> <td>ADMINISTRATIVE</td> <td>0301</td> <td>SUPERVISORY TYPE C SPECIALIST</td> <td>Excepted-Permanent, SES-Noncareer</td> </tr> </tbody> </table> <p>At the bottom left of the table, the <b>Return</b> link is highlighted in a red box. Other links include <a href="#">Edit</a>, <a href="#">Export</a>, and <a href="#">Create Bookmark Link</a>. The bottom right of the table shows navigation icons and the text "Rows 1 - 25".</p>	Employee ID	Grade	Position	Name	Rate	Agency	Position Code	Job Title	Employment Type	DS010108000000000000	1192	GS 14/3	Zalman, Marvin J M	41.00	ADMINISTRATIVE	1101	SUPERVISORY TYPE C INVESTIGATOR	Excepted-Indefinite, Excepted-Limited (More Than 1)	DS010108000000000000	1192	GS 14/6	Mildred, Fuller F	64.00	ADMINISTRATIVE	0341	SUPERVISORY TYPE L SPECIALIST	Excepted-Indefinite, Excepted-Limited (More Than 1)	DS010108010000000000	1192	GS 11/1	Albrecht, Terrance C	58.00	ADMINISTRATIVE	0301	SUPERVISORY TYPE C SPECIALIST	Excepted-Permanent, SES-Noncareer
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**Notes:**

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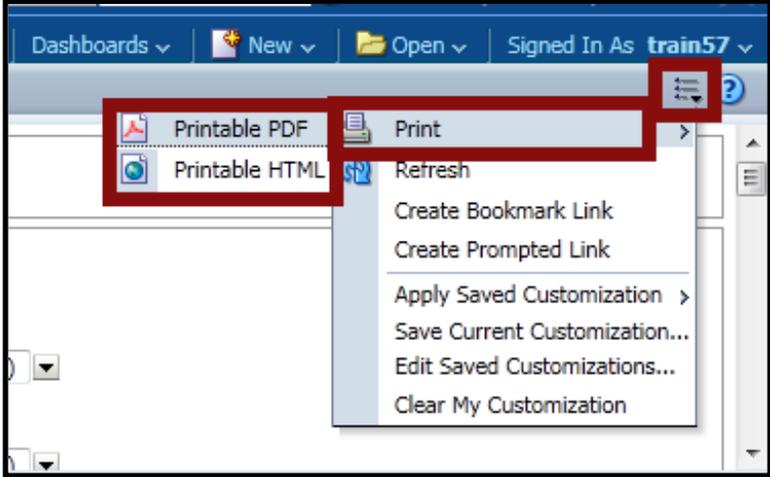
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## 7.4. Export/Print a Dashboard

### Print a Dashboard From the Run View

Step	Action
1.	<p>Click the <b>Edit</b> icon and select <b>Print</b> to print a dashboard from the run view.</p> <p><i>Figure 66: Edit Icon and Drop-Down Menu</i></p>  <p> <b>Edit:</b> Displays a menu of customization options.</p>
2.	<p>View the two options for printing dashboards, <i>Printable PDF</i> and <i>Printable HTML</i>.</p>

#### Notes:

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## Export Dashboard Reports

Step	Action																						
1.	<p>Export each dashboard report by clicking the <b>Export</b> action link below the item.</p> <p style="text-align: center;"><i>Figure 67: Dashboard Export Action Link</i></p>  <p>The screenshot shows a dashboard titled 'Workforce Profile Dashboard' with a sub-tab 'Workforce Profile'. It features a bar chart titled 'Top 10 Grade Distribution' with the following data:</p> <table border="1"> <thead> <tr> <th>Grade</th> <th>Number of Employees</th> </tr> </thead> <tbody> <tr><td>00</td><td>7</td></tr> <tr><td>05</td><td>4</td></tr> <tr><td>06</td><td>4</td></tr> <tr><td>07</td><td>4</td></tr> <tr><td>09</td><td>14</td></tr> <tr><td>11</td><td>12</td></tr> <tr><td>12</td><td>18</td></tr> <tr><td>13</td><td>37</td></tr> <tr><td>14</td><td>42</td></tr> <tr><td>15</td><td>40</td></tr> </tbody> </table> <p>Below the chart, there is an 'Export' menu with the following options: PDF, Excel, Powerpoint, Web Archive (.mht), and Data. The 'Export' menu is highlighted with a red box in the screenshot.</p>	Grade	Number of Employees	00	7	05	4	06	4	07	4	09	14	11	12	12	18	13	37	14	42	15	40
Grade	Number of Employees																						
00	7																						
05	4																						
06	4																						
07	4																						
09	14																						
11	12																						
12	18																						
13	37																						
14	42																						
15	40																						
2.	<p>Choose among <i>PDF</i>, <i>Excel</i>, <i>PowerPoint</i>, <i>Web Archive</i>, and <i>Data</i> export options when exporting the dashboard report.</p>																						

## 7.5. Access Dashboards: Exercise

### *Exercise 7.1: Run, Drill-down, and Print a Common Dashboard*

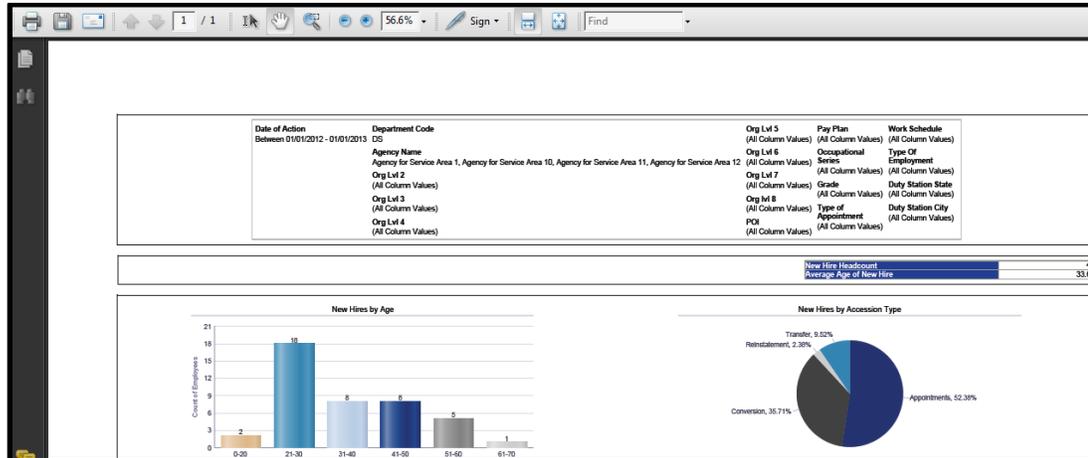
**Scenario:** Tom wants to share the New Hires Dashboard with his manager. As he is reviewing the dashboard, he notices some interesting data about the New Hires by Pay Plan report, so he decides to drill-down into the dashboard for a more detailed look.

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

1. Click the **Dashboards** action link from the top navigation bar and select the **New Hires Dashboard**.
2. Within the prompts section, select the following prompt values and click in the white space after each selection:
  - a. Date of Action between: 01/01/2012 and 01/01/2013
  - b. Department Code: DS
  - c. Agency Code: 01, 10, 11, 12
3. Click **Apply**.
4. On the first page, navigate to the New Hires by Pay Plan-Grade graph and click the GS vertical column to view the detailed operational report.
5. Click the **Return** action link to return to the dashboard.
6. Click the **Edit** icon and from the drop-down menu, select **Print**.
7. Select **Printable PDF** to print the dashboard in PDF format.

## Check Your Work:

Figure 68: New Hires Dashboard Printed to PDF



## 7.6. Chapter Review

### Chapter Summary

Having completed this chapter, you are now able to:

- Demonstrate how to access a dashboard
- Demonstrate how to drill-down within a dashboard
- Demonstrate how to export and print a dashboard

### Notes:

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U. S. Department of Agriculture  
NEW ORLEANS, LA

## 8.0. Course Summary

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### 8.1. Course Accomplishments

Having completed this course, participants are now able to:

- Describe the purpose of *Insight* as a reporting and analytics solution
- Describe how data, reports, and dashboards are structured in *Insight*
- Identify key features of *Insight*'s basic navigation
- Demonstrate how to access, view, and export reports and dashboards

### 8.2. Additional Resources

For additional resources please refer to the *Insight* website: [www.nfc.usda.gov/insight](http://www.nfc.usda.gov/insight)



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## 9.0. Appendices

### 9.1. Appendix A: Course Glossary

Concept/Item	Icon	Description
<b>Administrative Billings and Collections System (ABCO)</b>	N/A	Data source that provides billings for administrative accounts receivable and provides internal accounting control and reporting.
<b>Analysis</b>		Another name for a report in <i>Insight</i> , an analysis answers a business question using an organization's data.
<b>Attribute</b>		Type of data element that represents the largest set of data in <i>Insight</i> . There are three types of attribute data including time, source system, and <i>Insight</i> specific.
<b>BEAR</b>	N/A	Biweekly Examination Analysis and Reporting; results in biweekly updates in <i>Insight</i> .
<b>Catalog</b>	N/A	Organization system that provides access to personal and shared folders, including the Common Report Library.
<b>Common Report Library</b>	N/A	Set of frequently used government-wide reports that serve as templates for agencies to customize for their specific needs.
<b>Dashboard</b>		Presents a “snapshot” of data findings across multiple reports in a common theme or purpose.
<b>Data Dictionary</b>	N/A	Resource that outlines the data available in <i>Insight</i> , including the folders and data elements that comprise each Subject Area, source of each data element, and update frequency for each data element.
<b>Data Element</b>	N/A	Group of values in a common theme used to build columns in a report.
<b>Edit</b>		Displays a menu of customization options
<b>Filter</b>		Mechanism that restricts the data returned by a report before it runs.
<b>Folder</b>	N/A	Common theme by which data elements are

Concept/Item	Icon	Description
		structured in a Subject Area.
<b>Hierarchy</b>		Type of data element that represents related values that allow a user to drill-down into more detailed levels of the data.
<b>Insight</b>	N/A	An enterprise-wide data warehouse and reporting solution with advanced reporting and business intelligence capabilities.
<b>Insight Author</b>	N/A	User with access to the ad hoc environment to create and/or edit reports and dashboards.
<b>Insight Consumer</b>	N/A	User with read-only access to reports and dashboards.
<b>Managerial Report</b>	N/A	Type of report that provides mid-level detail of data with drill-down functionality to provide a more detailed data view.
<b>Measure</b>		Type of data element that represents numeric values that can change based on the calculation or scenario (e.g., employee count, totals).
<b>My Folders</b>	N/A	Folder in the Catalog that contains the user's privately saved reports; these reports cannot be accessed by other users.
<b>Operational Report</b>	N/A	Type of report that provides the most detailed view of data and answers a business question with a simple table and/or graph.
<b>Pay Data (PAYTA)</b>	N/A	Data source that provides bi-weekly net salary payroll data for salary payments and employee leaves after the Pay Computation System (PAYE).
<b>Payroll Accounting System (PACS)</b>	N/A	Data source that contains employee profile information and process personnel actions such as transfer, promotion, accession, performance appraisals etc.
<b>Personnel History (PERHIS)</b>	N/A	Data source that contains historical payroll and personnel information.
<b>PINE</b>	N/A	Personnel Input and Edit System; data results in daily updates in <i>Insight</i> .
<b>Prompt</b>		Mechanism that restricts data at the time the report or dashboard runs.
<b>Salary</b>	N/A	Data source that provides the payroll actions processed each pay period.

Concept/Item	Icon	Description
<b>Schedule</b>		Program a report to run at a certain time and/or frequency.
<b>Shared Folders</b>	N/A	Folder in the Catalog that provides access to the Common Report Library, Agency Folder, Shared Across Agencies Folder, etc.
<b>Subject Area</b>	N/A	Broadest category of data in <i>Insight</i> .
<b>Table Management (TMGT)</b>	N/A	Data source that provides table records containing selected data elements from the payroll/personnel, financial and administrative systems.
<b>Value</b>	N/A	Individual piece of information reported for a data element.

## 9.2. Appendix B: Permissions

### Applying Permissions to Catalog Objects

Permissions control access to shared information in Catalog Objects and Interactive Dashboards.

1. Click the Catalog action link from the top navigation bar.
1. Highlight the object in the Catalog.
2. Click on the More action link and select Permissions from the more drop-down menu.
3. From the Permissions window users can set permissions for Catalog objects including folders, dashboards, and reports.
4. The permissions table lists the users for which you have assigned permissions.
5. Click the New icon to add permissions to users.
6. From the Add Application Roles, Catalog Groups and Users window, type the user name in the Name text box.
7. Select Users from the List Drop-Down Menu.
8. Click Search.
9. The user name appears in the Accounts table. Select the user name and click on the More arrow to add it to the Selected Members table.
10. Click OK to Navigate back to the Permissions window.
11. Apply permissions to the users in the Accounts table from the Permissions drop-down menu.
  - **Full Control:** Grants full permissions for a Catalog Object.
  - **Modify:** Grants read, write, and delete permissions.
  - **Open:** Grants read access to all objects and allows users to traverse folders.
  - **Traverse:** Applies only to folders, allows movement through the folder to reach other objects or folders.
  - **No Access:** Denies all permissions for a Catalog Object.
  - **Custom:** Creates specific permissions to grant to users.



**IMPORTANT:** Users can select permissions for IDs with “Custom” permissions by clicking the Edit View icon and selecting from a menu of options (e.g., Read, Write, Delete etc.).

12. Additional options for permission modification are available in the Permissions window navigation bar.

- **Apply Effective Permissions:** Applies permissions based on the selected user's group role and assignments.
- **Replace with Parent's Folder Permissions:** Applies permissions from the highest level folder.
- **Set Parent's Folder's Permission to Traverse Folder:** Applies permissions for users to access through folders to a desired folder, report or dashboard, but necessarily to all items within that folder.
- **Apply Permissions:** Allows users to select permissions for the object for the selected user or role.
- **Delete:** Delete a user's permission and settings.



**IMPORTANT:** Users can use Ctrl+click to select multiple users in the list and apply permissions to multiple users by clicking the Apply Permissions icon.

13. Select "Apply permissions to sub-folder" to grant the same permissions granted to a parent folder on a sub-folder.

14. Select "Apply permissions to items within folder" to grant the same permissions granted to a parent folder on a sub-folder.



**IMPORTANT:** When an object is saved to the Catalog the parent folder's permissions are applied automatically.