Introduction of the RF Central Office Trainers
Housekeeping Rules
Course Objectives
Course Outline

Chapter 1: RF Report Center Overview
Chapter 2: How to Access the RF Report Center
Chapter 3: Navigating the Home Screen
Chapter 4: Run an Existing Analysis
Chapter 5: Create an Analysis – Part I: Criteria, Results, Sort, Saving
Chapter 6: Create an Analysis – Part II: Columns, Edit Formulas, Bins
Chapter 7: Create an Analysis – Part III: Prompts, Layout, Views
Chapter 8: Additional Views – Graphs and Pie Charts
Chapter 9: Scheduling and Exporting Analysis
Introduction to the RF Central Office Trainers

CONTACT INFORMATION

Kelly Kowalski
John Paris

Send any questions or inquiries to:

RF Report Center Email Address
Email: RFReportCenter@rfsuny.org
Housekeeping Rules

Demo and Practice

- Training is designed to have the trainers demonstrate a skill, then have the student emulate the skill.

- Students are encouraged to explore the tool at the end of the class or during exercises.

- Please do not go ahead of the instructor on the exercises.

- Trainers are available to assist students during hands on sections.

Please put all cell phones on vibrate.

Engage and give the class your full attention to get the most from this training session.

Collaborate with classmates to enhance your experience.
Course Objectives

At the end of this course, you will be able to:

- Gain an understanding of the new RF Report Center
- Learn the new RF Report Center terminology
- Be able to access the RF Report Center
- Navigate the Home Screen
- Run an existing analysis
- Edit and add additional fields to an existing analysis
- Create a new analysis
- Apply sorts and filters to your analysis
- Change column properties
- Create additional views and prompts
- Create bar graphs and pie charts
- Schedule an analysis
Before and After ……

You MAY be feeling like this.....

Our goal is that when you leave today you will be feeling like this....
CHAPTER 1

In this chapter, we will be covering the following items:

- Brief Overview of the RF Report Center
- RF Report Center Terminology
- Dimension Model, Facts and Dimensions
- Subject Areas, Dimensions, and Columns
RF Report Center Overview

RF Report Center provides data through dashboards and the ad-hoc Analysis reporting tool.

Currently, we offer two dashboards:
Principal Investigator (PI) Dashboard
RF Activity Interface Reporting (RFAIR) Dashboard.
## RF Report Center Terminology

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analysis</td>
<td>Report to answer your business questions, such as awards terming in a specified time frame, or list of employees by job title. It also allows you to interact with the data through charts, pivot tables, and reports.</td>
</tr>
<tr>
<td>Click Through</td>
<td>Access the RF Report Center by logging in through the RF portal using your portal username and password.</td>
</tr>
<tr>
<td>Column</td>
<td>Data elements that you want to display in your analysis.</td>
</tr>
<tr>
<td>Criteria</td>
<td>Includes the specific data requested including any filters to narrow your results.</td>
</tr>
<tr>
<td>Dashboard</td>
<td>A collection of related data on an interactive web page that provides the analysis of key trends, exceptions, and performance. Sometimes includes a prompt, allowing you to filter your data by selecting specific values, such as a date range.</td>
</tr>
<tr>
<td>Dimension</td>
<td>The folders within a subject areas in the RF Report Center.</td>
</tr>
</tbody>
</table>
# RF Report Center Terminology

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Element</strong></td>
<td>Also referred to as column, this is the items or data you would add to your analysis. Examples are: Award Number, Award Start Date, etc.</td>
</tr>
<tr>
<td><strong>Facts</strong></td>
<td>Contains the numeric values used to aggregate values, such as sum, count, and averages. Facts are considered predefined calculations.</td>
</tr>
<tr>
<td><strong>Filter</strong></td>
<td>Allows you to set the criteria to generate the results that are meaningful to your question.</td>
</tr>
<tr>
<td><strong>In Common</strong></td>
<td>Access the RF Report Center by using the single sign-on method. Users log in using their campus net ID and password.</td>
</tr>
<tr>
<td><strong>My Folders</strong></td>
<td>Any analysis saved to my folders is only accessible by the person that created the analysis. Users have the ability to create a subfolder within the campus folder for their own use.</td>
</tr>
<tr>
<td><strong>Results</strong></td>
<td>Returns the answer set to the criteria you want.</td>
</tr>
<tr>
<td><strong>Predefined Analyses</strong></td>
<td>Analyses converted from Discoverer to the new RF Report Center by central office. These are otherwise known as 650 reports.</td>
</tr>
<tr>
<td><strong>Prompts</strong></td>
<td>Allows you to create a filter data that will allow you to select values when opening and running an analysis.</td>
</tr>
</tbody>
</table>
# RF Report Center Terminology

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shared Folders</td>
<td>Any analysis saved to the Share folders makes the analysis available to all users that have access to the catalog.</td>
</tr>
<tr>
<td>Snapshot</td>
<td>Captures data at a point in time, such as, the end of the month, quarter, etc. Refer to Grants Snapshot.</td>
</tr>
<tr>
<td>Subject Area</td>
<td>Represents the business topics by which the RF Report Center is organized.</td>
</tr>
<tr>
<td>View Selector</td>
<td>Prompts that allow a user to access different views when running an analysis. An example would be the ability to view a detail or summary view.</td>
</tr>
</tbody>
</table>
Dimension Modeling – Facts and Dimensions

1. A dimension (otherwise known as Folders) is used to constrain or group the report.

2. A fact is a predefined calculation that has been added as a column. Some examples are:
   - Number of Awards
   - Available Balance
   - Current Budget
Subject Area, Dimensions and Columns

1. Subject Areas are otherwise known as Business Areas
2. Dimensions are otherwise known as Folders
3. Columns are otherwise known as Items
Navigating the Grant Snapshot Dimension

- Date
- Award
- Award CFDA
- Award Principal Investigation
- Award References
- Award Team
- Award Terms
- Expenditure Type
- Expenditure Category Group
- Project
- Project Principal Investigator
- Project Tasks
- Summary Group
- Sponsor
- Task Principal Investigator
- Grant Snapshot Facts
Navigating the Grant Snapshot Dimension

**Snapshot Aggregate Facts**

(Atd - Award To Date)

- Atd Active Dc Installment
- Atd Active Idc Installment
- Atd Active Installment
- Atd Billed
- Atd Budget
- Atd Cash Applied
- Atd Dc Budget
- Atd Dc Encumbrance
- Atd Exception
- Atd Expenditure
- Atd Idc Budget
- Atd Idc Encumbrance
- Atd Idc Expenditure
- Atd Inactive Dc Installment
- Atd Inactive Idc Installment
- Atd Inactive Installment
- Atd Recovery Funding Amount
- Atd Revenue
- Atd Shortage
Navigating the Grant Snapshot Dimension

Snapshot Aggregate Facts cont'd.
(Fye – Fiscal Year End)
• Fye Active Dc Installment
• Fye Active Idc Installment
• Fye Active Installment
• Fye Billed
• Fye Budget
• Fye Budget Change
• Fye Dc Budget Change
• Fye Idc Budget Change
• Fye Cash Applied
• Fye Dc Budget
• Fye Dc Encumbrance
• Fye Dc Expenditure
• Fye Encumbrance
• Fye Exception
• Fye Expenditure
• Fye Idc Budget
• Fye Idc Encumbrance
• Fye Idc Expenditure
• Fye Inactive Dc Installment
• Fye Inactive Idc Installment
• Fye Inactive Installment
• Fye Recovery Funding Amount
• Fye Revenue
• Fye Shortage
Navigating the Grant Snapshot Dimension

**Date**
- Award Close Date
- Award Created Date
- Award End Date
- Award Start Date
- Month End Date
- Project Completion Date
- Project Start Date
- Task Completion Date
- Task Start Date
Navigating the Grant Snapshot Dimension

**Award**
- Award NACUBO
- E-Verify Rule
- IDC Calc Period
- Interest Income
- On/Off Campus
- Property Title
- Prime Funding Source
- Disencumber IDC
- DHHS Agency Prefix
- DHHS Document Number
- Invoice Certification
- Award Organization Name
- Cost Sharing/Matching Info
- Closure Date
- Award Billing Term
- Award Full Name
- Award Id
- Award Number
- Award Organization Id
- Award Purpose Code
- Award Short Name
- Awd Cost Plus Structure
- Awd Idc Schedule Name
- Awd Org Campus Use 1
- Awd Org Campus Use 2
- Awd Org Current SUNY Number
Navigating the Grant Snapshot Dimension

Award (Cont’d)
• Award Purpose Type
• Billing Cycle Name
• Billing Distribution Rule
• Billing Format
• Billing Offset
• Created By
• End Date Id
• Fund Control Level Award
• Fund Control Level Res Grp
• Fund Control Level Res
• Fund Control Level Task
• Funding Source Award Number
• Hard Limit Flag
• Invoice Limit Flag
• Last Update Date
• Revenue Distribution Rule
• Status
• Type
• Allow Sch Name
• Award Campus Hub
• Award Economic Dev Region
• Award IDC Rate
• Awd Location Code
• Awd Location Name
• Recovery Act Funding
• Recovery Act Amount
Navigating the Grant Snapshot Dimension

**Award CFDA**
- CFDA Description
- CFDA Number
- CFDA Percent
- Primary Flag
Navigating the Grant Snapshot Dimension

Award References
- Required Flag
- Reference Type
- Reference Value
- Type Description
- Last Update Date
Navigating the Grant Snapshot Dimension

**Award Team**
- Award Role
- Award ID
- Creation Date
- End Date Active
- Full Name
- Last Update Date
- Start Date Active

**Grant Snapshot Facts**
- Date
- Award
- Award CFDA
- Award Principal Investigation
- Award References
- Award Terms
- Sponsor
- Summary Group
- Project Tasks
- Project Principal Investigator
- Project
- Expenditure Type
- Expenditure Category Group
- Task Principal Investigator
Navigating the Grant Snapshot Dimension

**Award Terms**
- Operand
- Value
- Category
- Category ID
- Description
- Last Update Date
- Name
- Term ID
Navigating the Grant Snapshot Dimension

Expenditure Category Group
- Asi Master Group
- Asi Master Order By
- Asi Sub Group
- Asi Sub Order By
- Description
- Last Update Date
- Name
- Term ID
Navigating the Grant Snapshot Dimension

Expenditure Type
• DC IDC Indicator
• Attribute 1
• Expenditure Category
• Expenditure Type
• MTDC Flag
Navigating the Grant Snapshot Dimension

**Project**
- Disencumber IDC
- Project Number
- Carrying Out Organization Id
- Closed Date
- Creation Date
- Description
- Last Update Date
- Limit To Txn Controls Flag
- Name
- Org Id
- Proj Location Code
- Proj Location Name
- Proj Org Campus Use 1
- Proj Org Campus Use 2
- Proj Org Current SUNY Number
- Proj Program Nacubo
- Project Id
- Project Org Name
- Project Status Code
- Project Type
- Project Type Class Code
- Project Value
- Template End Date Active
- Template Flag
- Template Start Date Active
- Project Campus Hub
- Project Economic Dev Region
- Project NACUBO
Navigating the Grant Snapshot Dimension

Project Principal Investigator
- Project Principal Investigator

Grant Snapshot Facts

- Date
- Award
- Award CFDA
- Award Principal Investigation
- Award References
- Award Team
- Award Terms
- Expenditure Category Group
- Expenditure Type
- Project
- Project Tasks
- Project Principal Investigator
- Sponsor
- Summary Group
- Task Principal Investigator
Navigating the Grant Snapshot Dimension

**Project Task**
- Attribute1
- Carrying Out Organization Id
- Created By
- Creation Date
- Description
- Geographic Region
- IDC Calc Period
- Last Update Date
- Limit To Txn Controls Flag
- Long Task Name
- Non-US Performance Site
- Off Campus Percent of Activity
- On/Off Campus
- Structure Override
- Task Campus Hub
- Task Current SUNY Number
- Task Economic Dev Region
- Task Id
- Task IDC Rate
- Task Location Code
- Task Location Name
- Task Nacubo
- Task Name
- Task Number
- Task Org Campus Use1
- Task Org Campus Use2
- Task Organization Name
Navigating the Grant Snapshot Dimension

Summary Group
• Summary Group
Navigating the Grant Snapshot Dimension

- Task Principal Investigator
  - Task Principal Investigator
CHAPTER 2

How to Access the RF Report Center

In this chapter, we will be covering the following items:

- Logging in to the RF Report Center
Logging into RF Report Center

1. Open an Internet Browser and log into www.rfsuny.org

2. Click on RF Report Center listed below Information For: Researchers
Logging into RF Report Center

3. You will be directed to the RF Report Center landing page. Click on the SUNY RF logo.

RF Report Center landing page contains references and links to training and any information related to the RF Report Center.
Logging into RF Report Center

You will be directed to the RF Report Center login page.

4. In Common Campuses: Click on your campus logo. Enter your Net ID and password on the next screen.

5. Click Through Campuses: Click on the SUNY RF logo. Enter your portal username and password on the next screen.
Logging into RF Report Center

Once you are logged in, you will be directed to the RF Report Center home screen.
Chapter 2 Practice Assignment

How to Access the RF Report
CHAPTER 3

Navigating the Home Screen

In this chapter, we will be covering the following items:

- Navigating the Home Screen
- Navigating My Folders and Shared Folders
- How to Set Preferences
- Catalog Directory Structure
Navigating the Home Screen

Now personalized to the user, the Home screen will contain:

- Your recent analyses
- Your recent dashboards
- Create Menu
- Browse menu to find created items
- Quick access menu

You will always get back to this page by clicking on Home.
Navigating the Home Screen

Create Menu - here is where you will begin creating your analysis

Recent dashboards visited

Other most recently items visited

Browse Folders
Navigating the Home Screen

Quick Access Menu
1. Home Tab – This tab will bring you to your home page.
2. Catalog – This tab will bring you to available analyses.
3. Favorites – This tab will bring you to your favorites.
4. Dashboards – This tab will bring you to available dashboards.
5. New – This tab will allow you to create an analysis.
6. Open – This tab will allow you to open any recent items visited.
7. Search – This will allow you to search for an analysis, dashboard or any other items. Choose what you would like to search on and type in your search term in the box to the right.
How to Set Preferences

You can set your preferences for the home screen.

1. Hover your mouse over your sign on information on the top left hand corner to click on My Account to bring you to the My Account page.
2. Click on the Preferences Tab.

It is recommended that you set the following preferences when first accessing the RF Report Center.

3. Starting Page – This will enable you to set the page you would like to see when you first log in. (Default Page). You will need to choose from the list of available options.
4. Analysis Editor – This option should be set to the Start on the Criteria tab when editing an Analysis. We will show you later on in the training why this option is more beneficial to you.
Catalog Directory Structure

The catalog structure is laid out as follows:

- **My Folders** – Any analysis saved to my folders is only accessible by the person that created the analysis. Users have the ability to create a subfolder within the campus folder for their own use.

- **Shared Folders** – Any analysis saved to the Share folders makes the analysis available to all users that have access to the catalog.

- **000-Public by CO Reporting** – Analyses created by the Central Office Reporting Team that are available to all users to open/run and/or copy, but cannot edit the query. This folder is broken down with other subfolders by functional area. Users do not have the option of saving newly created analysis to this folder.

- **Individual Campus Folders** – Any analysis saved to the Share folders makes the analysis available to all users that have access to the catalog. You should save your analysis to your appropriate campus folder. Users have the ability to create a subfolder within the campus folder for their own use.
Chapter 3 Practice Assignment
Navigating the Home Screen
CHAPTER 4

Run an Existing Analysis

In this chapter, we will be covering the following items:

- Run an existing analysis
- Reviewing the Search Feature
- Navigate the Results Tab
Open an Existing Analysis

1. There are two ways to open an existing analysis:
   a. Catalog tab
   b. Open tab

2. Double click to open Shared Folders and then Open the required subfolder.

3. Scroll to find the analysis you will be running and click on Open.
Searching for an Analysis

You can search for a specific analysis by following the steps below:

1. Click on the binoculars to bring up the Search window.
2. Location: Choose if you want to search in My Folders or Shared Folders.
3. Type: Choose Analysis
4. Type in part of the name or all of the name of the analysis you are searching
5. Click on Search
6. Your results will show in the window on the right.
Navigating Your Results

1. The results tab will populate when the analysis is finished. You will also see the title or name of the analysis.

2. There are 50 records per screen. To navigate through your results, you can click on the arrows:
   A) Move to the beginning
   B) Go back one screen
   C) Go forward one screen
   D) Display all results (there may be a delay if you are displaying a lot of data)
Navigating Your Results

Upon reviewing your results, the following listed are allowable actions:

1. **Edit** - Edit the analysis. After making changes to an existing analysis, you must Save As to your campus folder or your own folder or you will overwrite the analysis. More details in the next Chapter.

2. **Refreshes the page**
3. **Print the page in PDF or HTML**
4. **Export to other applications**
5. **Add to Briefing Book** (functionality not available at this time)
6. **Copy** – Copies the analysis so you can add your changes and save. More details of this functionality in the next Chapter.
Chapter 4 Exercise
How to Run an Analysis
In this chapter, we will be covering the following items and begin to create our analysis:

- Analysis Screen Overview
- Overview of the Criteria Tab
  - Filters
  - Sorting
- Overview of the Results Tab
- Save your Analysis
- Copy an Analysis
- Review Standard Saving and Naming Standards
Analysis Screen Overview

1. You can create an analysis by choosing Analysis under Create option from your Home page or selecting New from the tool bar.

2. The Select Subject Area screen will display and you will need to choose a subject area. Today we will be choosing Post Award Management.

3. You are able to add additional subject areas by clicking on the green + button and a window will display allowing you to add or remove additional subject areas.

Refer to the RF Report Center Subject Area Documentation located on the RF Report Center Landing page for a complete description of subject areas.
Analysis Screen Overview

This is the Analysis screen. The next slides will focus on breaking out each section.
Analysis Screen Overview

The analysis screen contains 4 tabs.

1. Criteria: This tab is where you will select the columns you want to add to your analysis. You will also be adding filters, sort options, calculations and many more options as discussed later on in the training.

2. Results: Click on this tab to retrieve your results.

3. Prompts: This tab will be used when creating prompts as discussed later on in the training.

4. Advanced: This tab is used for advanced option that will not be covered in today’s training but will be covered in an Advanced Analysis training offered at a later date.

Before you begin, it is important to plan your analysis carefully so that you do not have to continually make changes.

Ask yourself questions about what you want to produce, and which fields you want to use to get the results.
Criteria

The criteria tab specifies the criteria for an analysis, including columns and filters. You should always start on the criteria tab where you can select columns for your analysis.

1. The subject area will contain the dimensions and facts. The RF standard for creating analyses is to list the dimensions first, followed by the facts.
2. The structure works like a directory. Use the + sign to expand the dimensions and facts and expose the elements (columns) within.
3. Use the – sign to collapse the dimensions and facts.
1. You can begin selecting columns for your analysis under the dimension and facts by double clicking or dragging the element to the Selected Columns window.

2. The window below “Filters” will display all of your filters.

3. At the right of the Selected Columns window you can delete all columns by clicking on the double red X.

4. At the right of the Filters window, you can add more columns by clicking on the funnel and yellow + or delete all filters by clicking on the double red X.
Filters

- Filtering eliminates unnecessary data and gives you only the results you need.
- Filters can be applied to any column, whether it is showing in your analysis or not.
- You can apply multiple filters.

1. Choose the column you wish to filter on by clicking on the bulleted list to display your choices and click on Filter.
2. At the next screen, choose your Operator.
3. There are many choices to choose from to accommodate what you are trying to accomplish.
4. Choose your value by typing it in or choosing from the drop down menu.

Note: You can choose multiple values.
Filters

1. Successfully completed filters will appear in the Filter box.
2. You can create a filter for your analysis without having to display the column.
3. When you hover over the filter line with your mouse, the Edit and other buttons appear.
Filters

You can save filters and apply them to other analyses.

Save Filters
1. Once the filter is created, you can click on Save located at the far right.

2. It will create a folder for you automatically naming your subject area under your My Folders directory.

3. Name your filter and add a description if desired and click Ok to save.
Add Saved Filters to Analysis

1. Access your saved filter under the Catalog Pane that is located in the lower left hand corner in Criteria Tab.

2. Click on the filter you saved and click on the green plus sign and arrow to move it to the filters window.

3. Apply Saved Filter window will display and you will need to choose one of the options as it relates to your analysis.

4. The filter will appear in the filters window.
Sorting

- You can sort on any column
- You can sort multiple columns
  - First column sort is the primary sort
  - Second column sort is the secondary sort
- If a column’s sort is removed, remaining sorts move up in order.
- When the sort is changed or modified the analysis will automatically run again.

1. To add a sort to an element, click on the bulleted list to the right of the column name.
2. Select sort and you will be given many options as shown.
3. On the left hand side of the column you sorted, a icon will show you how you are sorting the column.
4. If you add multiple sorts on multiple columns, you will see a number indicating the order of the sort.
Results Tab

1. Click on the Results tab to see the results of your analysis.
2. The Compound Layout or View will display including a Title and Table view.
3. Title View: You are able to add a title by clicking on the pencil.
4. Table View: You are able to edit the display of the report by clicking on the pencil.
Saving An Analysis

1. To save an analysis that you create, click on the Save button.
2. To copy a pre-defined analysis (Central Office already created) is explained in the next section of this training.

Save all of your analysis in either your private folder called My Folders or in your campus location folder.

Permissions

3. To set the permissions on an analysis you created and saved in the shared folders, you will need to go back to the Catalog and select the More >Properties under the analysis.
4. Click Read Only button and set the ownership. This will allow a user to open or run the analysis, but they cannot edit it.
Copy An Analysis

The copy feature allows you to copy an existing analysis and save it with your changes to either your Folder or your campus location folder.

1. Click on the More option of an analysis that you want to copy. Choose Copy.

2. You will need to locate the folder where you would like to save the analysis in and click on Paste on the toolbar.

3. Click on Edit and then click on Save As to rename the analysis. You are now ready to make revisions.
Naming Standards for Analyses

Below are the suggested best practices to use for naming analyses:

1. The name should start with the subject area (i.e. PO for Purchasing, Grants for Grants, AP for Accounts Payable). Continue the name with a clear title of the query.

2. Complete the description field to indicate more detail of what is in the query.

3. As you will see below, the username is automatically displayed as the owner in the catalog so you do not need to add your name in the analysis.
Chapter 5 Exercise
How to Create an Analysis – I
CHAPTER 6

Creating an Analysis – Part II

In this chapter, we will be modifying our analysis and covering the following items:

- Inserting a Single Column
- Inserting Multiple Columns
- Columns Not Appearing
- Modifying Columns
- Column Properties
  - Style
  - Column Format
  - Data Format
- Edit Formulas
- Working with Bins – Grouping Feature
Inserting a Single Column

Adding one column at a time:
- Can be added in the results tab
- Allow quick additions to your results
- Can only be done one column at a time
- Results will immediately recalculate
- Good for small results return

Adding a Single Column

1. While in the results tab, select the column and double click to add it to your analysis. The analysis will run again and the column will appear in the results as the last column.

2. You can arrange the columns by clicking on the column name and dragging to the position desired.
Inserting Multiple Columns

Adding multiple columns:
- Must be added in the criteria view
- Process allows for multiple columns to be added to your results at once
- Multi-step process
- Involves editing your analysis

Adding Multiple Columns
1. Navigate to the criteria tab, select the columns and double click to add it to your analysis. When completed, select the Results tab.
2. The columns will be placed in the last column position and you can arrange the columns by clicking on the column name and dragging to the position desired.
Columns Not Appearing

Although you have run your analysis, you may find that sometimes your added columns do not appear in the results view. An extra step is required to get the columns to show.

Adding the “Lost” Columns

1. In the results view, find and select the Edit button in the top right hand corner of the screen. This is the layout view.
2. Drag them to the Columns and Measures area. The last column position and you can arrange the columns by clicking on the column name and dragging to the position desired.
3. Scroll down to find the Excluded area. Here are your hidden columns.
4. Click on Done located on the top right hand corner of the layout view screen. If you do not like the results, you can choose Revert to go back the original results.
Modifying Columns

You can modify the columns as needed by clicking the bulleted list to the right of the column name. A brief overview of the options are below.

1. Sort – Options available to allow you to specify the sorting order of your results.
2. Edit Formula – Allows users to create their own calculations to the analysis.
3. Column Properties – Format data by adding currency symbols, changing fonts and colors.
4. Filter – Allows you to eliminate unnecessary data and gives you only the results you need.
5. Delete – Allows you to delete the column from your analysis.
Column Properties

You can customize your column display:

- Can be done by selecting Column Properties
- Can add borders, shading, change fonts, or customize how data is displayed
- Customizations will appear when results are run

Customizing your column display:

1. Choose Column Properties from the bulleted list of the column you would like to customize.
2. You can change the display on the columns by clicking on the Style, Column Format and Data Format tabs.

More advanced formatting options will be covered on the Advanced Analysis training.
The Style tab allows the user to customize the individual column’s display.

1. **Font** – Options to change the font, size, color, style and effects.

2. **Cell** – Options to change the alignment, background color and image and the option to wrap text.

3. **Border** – Options for adding a border.

4. **Additional Formatting** - Options to change the size of the cells.
Column Format

The Column Format tab allows the user to rename the column heading and to choose to suppress grouping.

1. Click the Column Format tab.
2. Click on Custom Headings to begin customizing. Enter a name you would like to name your column.
3. You can also choose whether or not you want your values grouped by choosing Suppress or Repeat.
4. Click OK to save. These are the results.
Data Format

The options given are dependent on the column you choose. In this example, we will choose Current Budget and want to show the $ sign.

1. Click on Override Default Data Format to allow the user to choose options.
2. Treat the Number as – choose Currency
3. Currency Symbol – choose $
4. Click OK to save. These are the results.
Edit Formula

Edit Column Formula window allows users to create their own calculations to the analysis.

1. Select the column you would like to add your calculation to and click on the bulleted list and choose Edit Formula.

2. The Edit Column Formula window can be used to create the calculations.

3. Column Heading can be renamed, which is usually necessary when creating calculations.

4. The column formula editor can be used to choose the columns from the subject area window.

5. A series of calculation options are available at the bottom of the editor including basic math functions.
Bins – Grouping Feature

This feature allows the user to group data. The groups created (shown Figure A) allowed the user to divide the Economic Dev Regions into 3 categories.

1. Select the column you would like to add a grouping and choose Edit Formula.
2. Choose the Bins Tab
3. Click on Add Bin tab located at the bottom left hand corner.
Bins – Grouping Feature

4. A filter pop up window will appear. Click on the Value drop down list to choose your first group. Click OK.

5. You will be asked to name your group.

6. Your bin will be displayed in the Bins window. You can add more bins, or create a bin for all other values.

7. Additional Formatting Options
   - Funnel – You can adjust your filters
   - Pointing Finger – Edit your bin name
   - X – Delete your bin
   - Arrow – Move the position of your bin
Chapter 6 Exercise
How to Create an Analysis – II
CHAPTER 7

Creating an Analysis – Part III

In this chapter, we will be covering the following items:

- Creating Prompts
- Compound Layout
- Layout Editor
- View Selectors
Creating Prompts

The prompts tab allows you to create a filter data that will allow you to select values when opening and running an analysis. (otherwise known as parameters)

Creating Prompts
1. Create a filter on the column that you want to add as a prompt to indicate that you are adding a prompt to the analysis.
2. Choose “is prompted” as the operator.
Creating Prompts

1. Navigate to the Prompts Tab
2. Click on the green plus sign in the Definition Pane to access the prompt type selection list, Select “Column Prompt”, then select the column you want to filter on.
3. In the Label field, you can change the default label, if necessary. You can enter a short description for the prompt.
4. Choose an operator and from the User Input field, select how you want the prompt to interface to ask the user for input.
   - Text Field – free form (not recommended)
   - Choice List – provides a choice list
   - Check Boxes – provides a list to choose from
   - Radio Buttons – can only choose one value
   - List Box – provides a list of choices
Creating Prompts

The prompt options vary depending on the User Input you choose. The most recommended choice is to choose Choice List with the below options as shown on Figure 1:

- Enable user to select multiple values
- Enable user to type values
- Required user input

2. Once your prompt is created, you will see it the definition window.
Creating Prompts

1. To preview how the prompt will display, either use the Display pane or click on the Preview (eyeglasses) option.

2. The window will display the prompt with actual prompt values.
When on the results page, we note that a standard default Compound Layout includes a title, and a table view as shown in Figure A. You can make several kinds of changes to any of the views in a compound layout.

1. The first button gives you access to a “Format Container” dialog box, where you can change things like alignment, colors, or border styles.
2. The second button takes you to the editor. We will cover these options later on.
3. The third button removes a given view from the compound.

Note: You can also access the editor by using the toolbar in the views pane that appears at the bottom left hand corner of the screen as shown in Figure B.
Layout - Toolbar and Table Properties

Once you are in the Layout Editor, the compound layout tool bar offers many Options. You can hover your mouse over each option available such as printing, exporting, viewing the results, refreshing, etc. We are going to review the two most commonly used options from the Table View properties.

1. Content Paging – Check the Content Paging option to remove the scroll bar on the right of the report as shown in Figure A.

2. Row Styling – Check the Enable alternate styling option to allow the alternating “green bar” styling to color every other row white. This also improves readability on your table view as shown in Figure B.
The table view yields a number of options in the editor.

In the “Layout” pane of the editor, you can add totals and subtotals, change headings for fields, exclude fields, and much more. To make changes, you can drag fields into different sections of the pane, and use the Totals, Properties, and Options buttons.

1. **Table Prompts** – Drag and drop a column into this area and it will produce a prompt.
2. **Sections** – Drag and drop a column into this area and you are able to break out your report in sections and show a total for each section.
3. **Table** – You can re-order columns in the Layout by clicking on a column header and dragging it. A dark blue bar indicates where the column will end up. The window will display the prompt with actual prompt values.
4. **Excluded** – Columns can be excluded.
1. Grand Totals – Clicking on the Sigma button to the right of the Columns and Measures section and choosing After will add a grand total to the table as shown in Figure A.

2. Sub-Totals – Clicking on the Sigma button to on any column, will add a sub-total break whenever a new element appears in the list as shown in Figure B.
View Selectors

View selector will give you the ability to choose multiple views under the same analysis.

Adding View Selectors: To begin, you will need to create two different views, a detail and a summary. For this example, we will use an existing analysis.

1. Detail View - From the compound layout, click Table under the Views Pane on the lower left-hand corner.
2. Click on Rename icon to rename the table view to “Detail – Active Awards”
3. Add another table for the “Summary – Active Awards” by clicking on the New icon, then choosing table. A new table will display under Views pane called Table:2
4. Move Table 2 to the compound view by highlighting it and clicking on the icon.
View Selectors

5. The second table you added will be at the bottom of the compound view. You can edit this table to make this a summary page by clicking on the Edit button. Click on Done.

6. Go Table 2 under View panes and rename this to “Summary – Active Awards”.

7. Click on View Selector to move the option to the Compound Layout and add the two table views to the selector for users to choose from.

8. View Selector Window – Caption - Most commonly used Caption is “Select View”. Move the two tables we created from the available views to the Views Included. You can sort the order by clicking on the up and down arrows to the right of the box.

9. Lastly, you will need to go back to the compound layout and delete all other views except for the view you want to show.
Chapter 7 Exercise
How to Create an Analysis - III
In this chapter, we will be covering the following items:

- Additional Views
- Pivot Table Views
- Graph Views (Bar and Pie)
Additional Views

The Views pane offers a wide selection of views to pick from by clicking on the gold plus sign to the right of the Views as shown on Figure A.

As shown in Figure B, there are many views to choose from. We will review the most commonly used views.

Note: You will need to be in the Compound Layout view to access these options.
Pivot Table View

To create a Pivot Table view, use the add view icon to add a pivot table as shown in Figure A.

1. The Preview pane will display what your pivot table will look like.
2. The layout pane is where you arrange your items in the pivot table.
3. The pivot table view properties icon allows you to make basic changes to the pivot table such as adding alternating row “green bar” styling.
Pie Chart Views

To create a pie chart view, use the add view icon to add a Graph table as shown in Figure A.

Again, as in the Pivot tables, the top section will show you a sample view of your graph, the layout box allows you to customize it. You can choose different kinds of graphs as shown in Figure B.

The graph will change as you move the measures.
Bar Graph Views

To create a Bar Graph view, use the add view icon to add a Graph table, Bar, Recommended Subtype as shown in Figure A.

Again, as in the Pivot tables, the top section will show you a sample view of your graph, the layout box allows you to customize it. You can choose different kinds of graphs as shown in Figure B.

The graph will change as you move the measures.
Chapter 8 Exercise
Create Additional Views
In this chapter, we will be covering the following items:

- Scheduling Analyses
- Exporting Analyses
Scheduling Analysis

Analyses can be scheduled and delivered to recipients by email. This is called Agents. Access the Agent Scheduler by clicking on Agent under Create located on the right hand side of the home page as shown in Figure A. or by clicking on the toolbar within the compound layout as shown in Figure B.

1. **General Tab** - On General tab set the delivery priority to High, Normal or Low. Set the Run as to Specified User and enter the recipient’s email address.

2. **Schedule Tab** - It is used to define the time parameter for the agent to execute. Based on the report scheduling frequency (defines the time period of agent execution) you will need to set different parameters. There are different scheduling frequencies: Never, Once, Daily, Weekly and Monthly.
Scheduling Analysis

3. Delivery Content – Add a subject and select a format. Several formats are available as shown in Figure A. Delivery method can be directly or as an attachment.

4. Recipients – Enter email addresses of the recipients of the analysis by clicking on the email icon. A window will display where you can enter one or multiple email addresses as shown in Figure B.
Exporting Analysis

At any time, you may print or download any analysis by selecting links at the bottom of the analysis. As shown in Figure A. Print will allow you to print a HTML or PDF page as shown in Figure B. Export will allow you to export the data to a variety of tools including Excel, Power Point, or a file that can be read using Adobe reader (.pdf file). You can also export the data unformatted in a variety of formats.

1. Export to PDF Example
2. Export to Excel Example
3. Export to Power Point Example
Thank you for attending our class today.