

REPORT CENTER TRAINING

INFORMATION TECHNOLOGY SERVICES





CONTACT INFORMATION

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COURSE OBJECTIVES

After completing this course, you should be able to:

- Navigate within the Report Center
- Understand the business subject areas
- Create and modify analyses
- Filter Data
- Build and use views and charts in analyses
- Schedule Agents

COURSE METHODOLOGY

Each lesson is delivered through:

- Presentation
- Demonstration
- Hands-on Practice

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Report Center Terminology



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LESSON 1: INTRODUCTION TO THE REPORT CENTER

OBJECTIVES

After completing this lesson, you should able to:

- Navigate within the Report Center
- Understand where the data comes from •
- Search for analyses ٠
- Access dashboards

NAVIGATION

How do I get access?

Supervisor sends requests to <u>CustomerServices@rfsuny.org</u>

How do I sign into the Report Center?

- SSO Federated Campuses •
- All other campuses

HOW DO I ACCESS THE REPORT CENTER?

SUNY RF / Training / Report Center Login - Upgrade

Report Center Login

To log in to Report Center, select your campus location. For assistance, please contact Customer Services at (518) 434-7222.

BINGHAMTON UNIVERSITY UNIVERSITYATALBANY 0 SUNY POLYTECHNIC * Stony Brook University Using Campus Login 🧔 Buffalo State

LET'S TALK ABOUT DATA

Where does the data come from?

- Oracle EBS Applications •
- Data feeds from other campus systems (HR People Soft) ٠
- Pre-Award Compliance System (PACS) ٠

How does the data get there?

Nightly Schedule process

When is the data available in the Report Center?

Next business day





Based on your campus credentials, there are three ways to access the Report Center.

- 1. In-Common Campuses that are highlighted in yellow will access the Report Center by clicking on their campus location. They will sign on using their user credentials.
- 2. SSO Federated Campus that are using SSO Federated will click on the drop down list and choose their campus location. They will sign on using their user credentials.
- 3. Portal Access All other campuses that are not using In-Common or SSO Federated, will click on All Other Locations. They will sign on using their user credentials.



GLOBAL HEADER

The Home Page contains a Global Header with drop-down menus for the most frequently performed tasks.



The Home Page provides an intuitive, task-oriented, centralized workspace divided into sections.

In the **Create** section, you will have access to create analyses and to schedule agents. The area to the right of this panel shows at the top, your **Recent** dashboards and **Other** objects, and below that, the **Most Popular** ones accessed. Under each of these objects are links to Open, Edit and More options.

CATALOG



The catalog is organized into folders that are either shared or personal. **My Folders** contains all the objects that you have created. This folder is restricted and only the user has access.

Shared Folders contains folders to which you have permissions to. The **000 Public by CO Reporting** folder contains analyses created by Central Office that are restricted to read only.

All other **Campus** folders are unrestricted and are cataloged by business subject. Each campus has the ability to create folders under shared folders.



Locati	on /Shared Folders/110 Payroll Test
e A-Z	
rt - Attempt	: #1 6-12-14 Last Modified 8/2/2018 12:
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Availah	le tasks for the selected



FAVORITES



Favorites allow you to bookmark objects you want to view regularly. After you add objects, the object icon is updated with a gold star.

You can access Manage Favorites to organize your favorites.

DASHBOARDS



ACCOUNT PREFERENCES

My Account			
User ID Display Name:			
Preferences	BI Publisher P	references Mobile Preferences	Delivery Options
	Starting Page	Default	
Lo	cale (location)	Default - English - United States	•
User Interf	ace Language	Default	0
		Current Session Setting: English	
	Time Zone	Default - Unknown Time Zone	
Subject A	rea Sort Order	Default - Sort in Saved Order 🔻	
Prompts A	uto-Complete	● Default 〇 On 〇 Off	
А	nalysis Editor	Full Editor Start on Criteria tal	b when editing Analy
		O Wizard (limited functionality)	
Acce	ssibility Mode	◯ Default ◯ On Off	



Available dashboards appear in the **Dashboards** drop down list. The availability is based upon user access that has been assigned.

Most dashboards have an **Overview** tab which explains the purpose and data within the dashboards.







LESSON 1: SUMMARY

In this lesson, you should have learned how to:

- Navigate within the Report CenterNavigate within the Catalog





PRACTICE 1: INTRODUCTION TO THE REPORT CENTER

Goal

In this practice, you gain familiarity with the main elements of the Report Center's user interface.

Time

10 minutes

Task

Log in to the Report Center, navigate to the Home page and explore the search capabilities and the Global Header options to become familiar with common tasks.

Signing in to the Report Center

- 1. Sign into Report Center
 - a. In a browser,
 - b. On the sign in screen, enter the user ID and password as provided by your instructor.
 - c. Click Sign The Home page is displayed.
- 2. In the left pane of the Home page, notice the Create section, which provides quick access to create new analyses and agents.

Browsing Report Center

1. Click the Catalog Link in the top pane of the Home page.

This opens the Catalog pane, which includes the tools and panes that enable you to explore the available Catalog folders. When you browse the Catalog, the Folders pane is displayed to the left of the list of selected folders and objects.



- 2. Search the Catalog:
 - a. Click the Search button to open the Search Pane.
 - b. locations.
 - C.
 - d. Search to search the Catalog for the analyses that pertain to Grants at Risk.

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Search Location	Grants At Risk ×		Å	Sch /Sh Edit
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3. Access Report Center Dashboards:

have access to.

END: This concludes this exercise.





Expand the Location drop-down list and notice that you can search My Folder, Shared Folders or All

Expand the Type drop-down and notice that you can search by any catalog object type.

Enter Grants at Risk in the Search field, select All in both the Location and Type drop-down lists, and click

	Alertist	Home	Cat
h Result			
Sort Last Modified Descending Show More Details			
iuled Monthly Grants at Risk Last Modified 9/10/2017 6:19:36 AM Owner KELLY.KC d Folders/030 University at Buffalo/Rosie McCarthy Run More details More ~)WALSKI@R	FSUNY.O	RG
s At Risk Report Last Modified 9/1/2017 1:45:33 PM Owner d Folders/011 CNSE/Account Administration Edit More v			
s At Risk Status Report Last Modified 1/24/2017 12:12:49 PM Owner d Folders/000 Public by CO Reporting/Grants (Updated Daily) Edit More ↓			
s At Risk Report Last Modified 1/24/2017 12:12:49 PM Owner OBIEE - CO Super Use d Folders/000 Public by CO Reporting/Grants (Updated Daily) Edit More v	er		
s At Risk Report Last Modified 11/3/2016 10:14:49 AM Owner KELLY.KOWALSKI@R d Folders/650 Central Office Edit More ↓	FSUNY.ORG		
s At Risk Report Last Modified 11/3/2016 10:14:32 AM Owner MAERZSV@BUFFALO: d Folders/160 Buffalo State College/Maerz Edit More ↓	STATE.EDU		
s At Risk Report Last Modified 11/3/2016 10:14:22 AM Owner GRUCELLO@RESEAR d Folders/030 University at Buffalo/Rose Grucello Edit More v	CH.BUFFALC	.EDU	
s At Risk Report Last Modified 11/3/2016 10:14:16 AM Owner ROBIN.POWERS@RF3 d Folders/011 CNSE/270 SUNYIT Edit More v	SUNY.ORG		

a. Click **Dashboards** on the Global Header to display the drop-down list of all the available dashboards that you



LESSON 2: WORKING WITH ANALYSES

OBJECTIVES

After completing this lesson, you should be able to:

- Understand terminology used (in packet)
- Identify the important elements of an analyses
- Use Analysis Editor
- Create, modify and save analyses
- Apply formatting to an analysis

SUBJECT AREAS





Subject Areas contain information about the specific business area.

They are organized in folders and columns.

When you create a **New** analysis, first select the subject area with which you want to work in.



COLUMNS



Columns represent the pieces of data that an analysis will return (data fields).

They are organized in folders within subject areas.

There are two types of columns.

Dimensional Columns: Columns similar to columns in a table.

Measure Columns: Also called Facts, contain data values, usually numeric or dollars that can be added up.

ANALYSIS EDITOR

T #

▲ Selec

⊿ Filter

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V

Analysis Editor: The Analysis Editor provides an area to create, modify, and save analyses, and filters.



ANALYSIS EDITOR TABS





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					Remove all	columns
						To X X
		Cri	eate and rem olumns from	ove filters the analys	on sis.	

Criteria: To specify and modify the criteria, formatting, and other aspects of an analysis, including columns and filters.





Prompts: Create prompts that allow users to select values to limit.

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CREATE AN ANALYSIS



Select a Subject Area

Select columns from the subject area folders in the Subject Areas pane to create analysis criteria.

Double click on folders to expand and collapse them.

Drag or double click columns to add them to the Analysis Editor. Each column box has two sections:

1. Upper section displays the folder the column came from.

2. Lower section is the name of the column.



MODIFY ANALYSIS CRITERIA (SORTING COLUMNS)





MODIFY ANALYSIS CRITERIA



More Options: Click to the right of the column to modify analysis criteria by using the following options:

- 1. Sort specifies the order in which results should be returned: ascending or descending. You can order results by more than one column by selecting the Additional Sort options after you have set the initial sort. If you choose more than one column, a different image appears on the column to indicate primary and secondary sorting.
- 2. Column Properties enable you to edit the format of the column.
- 3. Filter enables you to create a filter for the column. Details are covered in the next lesson.
- 4. Delete removes the column from the analysis and the from the Selected Columns pane.

MODIFY ANALYSIS CRITERIA (STYLE)

Column Format	Jata Format Conditional Format Interaction	
Z D B	Clear, copy and paste	e formats.
Family Arial	Size 15	Sponsor Name
Color S	tyle Default (System) Effects Default (System)	RMS Allocation Account
Cell Horizontal Alignment	Default (Left) 🔻 Background Color 🔽 💌	Corporate Funded
Vertical Alignment	Center 🔻 🗹 Wrap Text	US Department of Energy
Position Defa	ult (Left) ▼	Empire State Development Corp
Position Custom	▼ Border Style Default (System) ▼	Empire State Development Corp
Additional Formatt	ing Options	NYS Department of Health
Width	Height Right	Empire State Development Corp
Top Padding	Bottom Padding	Empire State Development
▶ Custom CSS Style	Options (HTML Only)	Corp



To set the primary sort, select Sort Ascending or Sort Descending, depending whether you want the sort to be ascending or descending.

To add subsequent sorts on other columns in your analysis, select Add Ascending Sort or Add Descending Sort options.

To clear a sort for a particular column, select the Clear Sort option for a specific column.

To clear all sorts for the analysis, select Clear All Sorts in All Columns.



Award En
30-Sep-20
30-Jun-20
27-Sep-20
31-Dec-20
31-Mar-20
31-Mar-20
31-Jul-201
03-Aug-20

You can set formatting and style options for columns. The options applied on this tab are static and apply globally to all views based on the analysis.

In the Font area, you can specify the font family, size, and color as well as style and effect options such as bold.

In the Cell area, you can specify text alignment, cell background color or image, wrap text and cell borders.

In the Additional Formatting options, you can specify cell width, height, and padding.

Additionally, the icons at the top of the tab enable you to clear formats (restore defaults), copy custom formats, and paste formats copied from another column.



MODIFY ANALYSIS CRITERIA (COLUMN FORMAT)

column For	mat Data Format	Conditional Format	Interaction		
Headings				_	Hide
Folder Heading	Sponsor			₿Å.	0
Column Heading	Sponsor Name			17A	-
	Custom Heading	gs Markup	2	V	
Suppress (Repeat				eading

Override formatting defaults for column visibility, headings and data duplication.

- 1. Select **Hide** check box to hide the column in the analysis results.
- Select the Custom Headings check box to change the name of the folder heading and/or column heading. Click the buttons to the right of the fields to open the Edit Format dialog box and change formatting options.
- In the Value Suppression area, choose the appropriate option to control the display of duplicate data. Select Suppress to display repeating data only once and suppress duplicate rows. Select Repeat to display repeating data for every row.

ANALYSIS RESULTS FORMATTING



Click the **Results** tab to see the results of an analysis. The **Compound Layout** consists of a **Title** view and a **Table** view. An analysis can be displayed in many formats. You can add more views and formats by using the **New View** button.

MODIFY ANALYSIS CRITERIA (DATA FORMAT)

column Properties		
Style Column Format	Data Format Conditional Format	Interaction
Override Default D	ata Format	
Treat Numbers As	Number	
No online France	Percentage	
Negative Format	Month Name Month Name (Abbreviated)	
Decimal Places	Day Name	
	Day Name (Abbreviated) Custom	
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		7
	Locale Short Date: 6/8/2003 Locale Long Date: Sunday, June 08, 2003	1
	Locale Short Date: 6/8/2003 Locale Long Date: Sunday, June 08, 2003 ODEC: 2003-06-08 Sunday. June 08, 2003	
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- Select the **Override Default Data Format** check box to override the default display. The selections that you see will vary based on the data type. Most common changes will be for numeric and date formats.
- 1. In the column that contains **Numeric** data, you can choose how you want the numbers treated (such as percentages and currency). You can choose the number of decimals to display, negative numbers, digits, and thousands separators.
- 2. In the column that contains **Date**, you can change different date and times zone formats.

ADDING BASIC FORMATTING TO TABLE VIEWS





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	31-Mar-2019				

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FORMATTING COLUMN HEADERS AND VALUES

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			16-Oct-2009	30-Jun-2011	1/		1.00	0.00	
			28-Jun-2011	27-Sep-20			1,338,720.00	387,200.00	95
			01-Jan-2013	31-Dec-2017	1		28,050,000.00	28,017,182.52	3
			01-Apr-2014	31-Mar-2019			1,000,000.00	0.00	1,00
			01-May-2016	31-Mar-2020			300,000.00	199,723.68	10
			01-Feb-2016	31-Jul-2018			500,000.00	338,803.43	16
			01-Feb-2016	03-Aug-2017			500,000.00	500,000.00	
			21-May-2014	31-Dec-2018			2,150,461.16	760,355.95	1,39
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To format table column headings and values:

- 1. On the **Results** tab, click **Edit View**.
- 2. The View Editor is displayed. In the Layout Pane, under Columns and Measures, click the More Options button for a column and select Format Headings.
- 3. In the **Edit Format** dialog box, define changes and click OK.
- 4. In the upper right hand corner, click **Done**.

SAVE AN ANALYSIS





Analyses are saved in folders that are either personal or shared.

- 1. Click the **Save As** button to display the dialog box.
- 2. Select a folder in which to save the analysis, using the left selection pane. To create a new folder, click the **New Folder** button, enter a name for the folder and click OK.
- 3. In the **Name** field, enter a name for the analysis and click OK.

SUNY RF DATA VIEWING FORMATTING

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Award Location Code	Award Number	Award Start Date	Award End Date	Award Principal Investigator	Budget	Expenditures	Balance
650	52114	01- Sep- 2009	30- Sep- 2012	Wade, Mr. Christopher J	1,393,512.00	1,393,512.00	0.0
660	52406	16- Oct- 2009	30- Jun- 2011	Toas, Mr. Joshua B.	1.00	0.00	1.0
011	63464	28- Jun- 2011	27- Sep- 2013	Farrar, Mr. Paul A.	1,338,720.00	387,200.00	951,520.0
011	65480	01- Jan- 2013	31- Dec- 2017	Liehr, Dr. Michael M.	28,050,000.00	28,017,182.52	32,817.4
210	68503	01- Apr-	31- Mar-	Freedman, Mr. Daniel	1,000,000.00	0.00	1,000,000.0

To change the appearance of your analysis and to remove the scroll bars, click on **Table Properties** and then click on **Content Paging** and click OK.





LESSON 2: SUMMARY

In this lesson, you should have learned how to:

- Identify the important elements of analysesUse Analysis Editor
- Construct, modify, and save analyses





PRACTICE 2: CREATING AND FORMATTING AN ANALYSIS

Goal

In this practice, you will create and format an analysis.

Time

25-30 minutes

Task

Create and format a new analysis, view the results, and save the analysis in the Catalog.

Creating a Basic Analysis

- 1. Sign into Report Center (if already not signed in)
- 2. Create an analysis to determine the available balance on specific awards for your location.
 - a. On the Home page, in the Create Section, Click Analysis to navigate to the analysis editor.
 - b. In the Select Subject Area pop up menu, click **Post Award Management**.
 - Open the Award folder and choose the following Dimensional columns: C.
 - i. Award Number
 - ii. Award Name
 - iii. Award Purpose Type
 - iv. Award Location Code
 - d. Open the Fact -Award folder and choose the following Measure columns:
 - Current Budget i.
 - ii. Expense Amount
 - iii. Commitment Amount
 - iv. Available Balance
 - e. Click the Results tab. You should have a list of awards and available balances. (Contact Instructor if no data returns) Notice that the results appear in a table format in the Compound Layout.
 - f. Open the Award Principal Investigator and drag the column Award Principal Investigator to the Compound Layout and drop the column after the Award Name column. Open the Date folder and add the following columns:
 - i. Award Start Date (Choose Date)
 - ii. Award End Date (Choose Date)
- 3. Edit the Table Properties
 - a. In the Compound Layout (you should be on the Results tab), click the Table View Properties button to explore the properties that you can set for the table in the Table Properties dialog box.

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-	In the Da	ata Viewing se	ection, select Content	paging.				
e Pr	In the Da	ata Viewing se	ection, select Content	t paging.				
le Pr le	In the Da roperties	ata Viewing se	ection, select Content	t paging.				
e Pr le	In the Da	ata Viewing se ack Data Viewing	Encircle Content Select Content Tixed headers with O Content paging	t paging.				
e Pr	In the Da roperties	ata Viewing se ack Data Viewing	Fixed headers with Content paging Paging Controls Bo	t paging.				

- have disappeared.
- 4. Save the analysis in a new folder in the **My Folders** section of the **Catalog**.
 - a.
 - Select My Folders. b.
 - Click the **New Folder** button. C.
 - Name the New Folder: Report Center Training and Click OK as shown below. d.
 - Then name the analysis: **Practice 2** e.

Name	Report Center Training	
Help		OK



c. Click OK to accept the other default settings and close the Table Properties dialog box. Notice the scroll bars

Click the Save Analysis button and the Save As dialog box appears.





Modifying an Analysis

- 1. Modify the Practice 2 analysis to sort Award Principal Investigator in ascending order, then Award End Date in descending order.
 - a. Click the Criteria tab.
 - b. Click the More options button for the Award Principal Investigator column.
 - Select Sort > Sort Ascending. C.
 - Click the More options button for Award End Date column. d.
 - Select Sort > Add Sort Descending e.
 - Click the **Results** tab to verify the sort as shown below. f.



Edit Format 🥔 间 🛍 Family Default (System) Size Color Style Default (System) Effects Default (System) contal Alignment Default (System) 🗸 Background Color Vertical Alignment Default (System) ✓ Wrap Text Image Select Image Position Default (System) Position Default (System) 🗸 Border Style Default (System) 🗸 Border Color Additional Formatting Optio E Custom CSS Style Options (HTML Only) OK Cancel



- 2. Modify and format column headings in the Table Editor.
 - a. Click the Edit View button in Compound Layout.
 - Format Headings. The Edit formula box is displayed.
 - In the Caption text box, enter Award PI. C.
 - In the Cell area, click Background Color selector dialog box. d.
 - Select the any light color and then click **OK**. e.
 - Change the font color under Font. f.
 - View the results of your changes. g.
 - Click Done to save your changes. h.

END: This concludes this exercise.

Formatting the Table View

- 1. Center the alignment of the values of the columns.
 - a. Click the Edit View button in Compound Layout.
 - b. In the Layout Pane, click the More Options button for Award Location Code column and then select Format Values. The Edit formula box is displayed.

ator	Type	Code		Colu	mn Propert	ies		Amount	
, Mr.	Sponsored	350		Forn	nat Heading	js	700	439,44	7.01
	Program			Forn	nat Values				
				Hidd	len				
, Mr.	Sponsored	350	New Calculated Item					359,82	4.00
				Agg	regation Ru	le ≯			
Moro	Ontions			Dup	licate Layer				
WOIE				Rem	ove Colum	n			Awa
Σ	Award Loca	tion Code	ß	Σ	Award S	Start Da	te 🗉	Σ	🗎 A1
							_		

- In the Cell section, select Center in the Horizontal Alignment drop down box.
- d. Click OK and verify that the Award Location Codes column is now centered.



- Open the Edit Format dialog box again (Format Values for e. Award Location Code)
- Click the Copy Cell Format button and then click Cancel to f. close the Edit Format dialog box.
- Open the Edit Format dialog box to format values for the g. Award Purpose Type column.
- h. Click the Paste Cell Format button to paste formatting from the Award Location Code column cells.
- Click **OK** and verify that the **Award Purpose Type** column is i. now centered.

	×
Size	
Effects	Default (System) 🗸
Effects	Default (System) 🗸

b. In the Layout Pane, click the More Options button for Award Principal Investigator column and then select



LESSON 3: FILTERING DATA FOR ANALYSES

OBJECTIVES

After completing this lesson, you should be able to:

Create filters to limit your results of analyses

USING FILTERS TO LIMIT DATA

per-column basis.





Filters limit results when an analysis is run. Only those results that match the filter criteria will return. Filters are applied on a

		l≌ 53 €
		Save and name a filt
Award Principal Investigator	Budget 🖏 🚦 Expenditures 🖏 🚦 Balance 🕯	Award to use again
	Create a filter wher does not have to di	re the column isplay on the
	Create a filter wher does not have to di report.	re the column isplay on the



CREATING AND EDITING FILTERS

You can create, display and manage filters in the Filter pane for the analysis they are associated with.



You can also use the Create/Edit Filter dialog box to create and edit filters.

CREATING AND EDITING FILTERS

The New Filter dialog box appears when you create a new Filter. A column filter consists of the following elements:

- 1. **Column** to filter (Award Location Code)
- 2. A Value to use when applying the filter (010, 020, 030)
- 3. An **Operator** that determines how the value is applied (is equal to/is in)

Column	Award Location Code 🛛 🙆	
Operator	is equal to / is in	~
Value	Add More Options Clear All	₹
Protect	Filter	
Conver	t this filter to SQL	

New Filter	•	×
Column	Award Location Code	:c 2
Operator	is equal to / is in	
Value 3	is not equal to / is not in is less than is greater than is less than or equal to	
Protect	is greater than or equal to is between	
Conver	t is null is not null is ranked last is ranked first	
	contains all contains any does not contain begins with ends with	
Help	is LIKE (pattern match) is not LIKE (pattern match)	OK Cancel
	is prompted is based on results of another analysis	



	×
Column	Award Location Code 12
Operator	is equal to / is in
Value	💌 💏
2	001
Protect	010
	011
Conver	t 🗌 020
	030
	050
	🗌 100 🗸 🗸
	110
	Search Limited Values All Values
Help	OK Cancel
cip	OK Carca
_	
	Click on the pencil to edit an existing filter.
	Click on the pencil to edit an existing filter.











LESSON 3: SUMMARY

In this lesson, you should have learned how to:

- Describe the use of filters in limiting results of analyses
- Create filters from the columns that are being used in the analysis
- Create filters without having the columns display in the analysis

PRACTICE 3: ADDING FILTERS TO ANALYSES

Goal

In this practice, you will limit data by using filters

Time

10-15 minutes

Task

You will add filters to limit query results

Creating a Basic Analysis

- 1. Sign into Report Center (if already not signed in)
- 2. Open your "Practice 2" analysis you just created and click on the Criteria tab.
- 3. Add a filter to show the following:
 - a. Award Purpose Type is Sponsored Programs
 - b. Award Status is Active
 - c. Award Location Code should be your own location
- 4. Click on the Results tab and ensure the data is accurate.
- 5. Save as Award Available Balance.

END: This concludes this exercise.



a. Go to catalog directory and retrieve analysis or locate it on your Home page and click on Edit.



LESSON 4: ADVANCED VISUALIZATION IN ANALYSES

OBJECTIVES

After completing this lesson, you should be able to:

- Add additional views of the data that is returned by an analysis •
- Modify and format views •
- Work with compound layouts •

ADVANCED VISUALIZATION IN ANALYSIS

Why use different views?

- Helps users look at results in meaningful ways
- Helps to identify trends when you use multiple ways •

Table View Types	
Table	
Pivot	
Graphical View Types	
Graph	
Gauge	
Мар	
Performance Tile	
Trellis	

DESCRIPTION OF GRAPH VIEWS

There are a variety of different available graphs as shown on this slide. Each of these are edited using the Graph Editor, whose tools and layout vary slightly different depending on the graph chosen.



Most Popular

- •







Analyzing Trends

category totals

Determine whether values are rising or falling over time



Comparing Values Assess similarities and differences across specified categories



Comparing Values and Their Parts Assess similarities and differences for individual segments and overall



Comparing Explicit Values I View precise values for specified categories



Comparing Percentages View the percentage contribution of each part to the whole



Discovering Patterns and Outliers Assess the strength and direction of the relationship between two variables and whether extremes exist in the data

View All Recommendations View visualization matches for all types of analyses

- Bar: Shows quantities as bar lengths –useful for comparing
- differences among like items
- Pie: Shows data sets as percentages of a whole useful for comparing parts of a whole.
- Line: Shows quantities over time or by category useful for showing trends over time





VIEW EDITORS



To create or edit a **Graph**, specify its type and then drag analysis columns to the appropriate sections (horizontal axis, vertical axis, legend).

Graphing Best Practices

A general guideline is to keep graphs as simple as possible.

More complex graphs can make it difficult for users to comprehend the information; more details lead to more distraction. Two dimensional (2D) graphs can be easier to interpret than three dimensional (3D).

GRAPH PROPERTIES: STYLE



GRAPH PROPERTIES: GENERAL



To open the **Graph** properties dialog box, click the **Edit Graph Properties** button in the view editor toolbar.

On the **General** tab of the **Graph Properties** dialog box, you can set the size of the graph and specify the location of the legend.

Note: Some of the options are not available for specific graphs.

GRAPH PROPERTIES: TITLES AND LABELS





On the **Style** tab of the **Graph Properties** dialog box, you can set properties that can control the appearance of the graph. Each section of the dialog box has options to control different aspects of the graph.

In the **Plot** area section, you can specify and format colors for the graph's background.

In the **Legend** and **Canvas Colors and Borders** sections, you can determine the colors and settings for backgrounds and borders.

On the **Titles and Labels** tab of the **Graph Properties** dialog box, you can customize graph titles, axis titles, and labels. Each section of the dialog box has options to control different aspects of the graph.

Specify custom graph title and axis titles

Click the **Format** buttons for different labels to specify fonts and styling.

Set formatting options for the Legend and labels.



LESSON 4: SUMMARY

In this lesson, you should have learned how to:

- Add additional views of the data that is returned by an analysis
- Modify and format views
- Perform common tasks in views





PRACTICE 4: ADVANCED VISUALIZATION IN ANALYSES

Goal

In this practice, you will explore and work with a variety of views and graphs in your analysis.

Time

20 - 25 minutes

Task

You will add and format a graph view, format and arrange Table, Filters and Graph views within a Compound Layout, and then create copies with different views and arrangements.

Creating a Simple Analysis

- 1. Sign into Report Center (if already not signed in)
- 2. Create a new analysis to determine the FYE expenditures for equipment, supplies and travel for your location.
 - a. In the Select Subject Area pop up menu, click Grants Snapshot.
 - b. Choose the following columns:
 - i. End Date (Located Date>Month End Date> End Date
 - ii. FYE Dc Expenditures
 - iii. FYE ldc Expenditures
 - iv. FYE Expenditures
- 3. Add a filter to show the following:
 - a. End Date = January, February and March Month Ends Hint: Need to add a filter to a column that is not in the analysis
 - b. Award Purpose Type = Sponsored Programs
 - c. Task Location Code = Your own location
- Click on the Results tab and ensure the data is accurate. 4.

How do I check for data Accuracy? Go to the Dashboard and validate through the SPAR. Ensure you have the correct month end date chosen.

5. Save as FYE Expenditures in your training folder.

Adding Different Graph Views

- 1. On the toolbar, click the New View button and select Graph > Bar > Recommended Subtype.
- A graph view is added to the bottom of the Compound Layout. It has also been added to the Views pane. 2.
- Click the Edit View button for the Graph view in the Compound Layout to open in the Graph Editor. 3.
- Click on the Edit Graph Properties button to open the Graph properties dialog box. 4.
- **Explore** and set options on the General, Style, Scale and Titles and Labels tabs. 5.



- 6.
- Drag Task Location Code to the Excluded. 7.
- Click on **Graph Properties > Style** Tab and change to Cylinder and 3D. 8.
- Click on Titles and Labels and change the Graph Title and Vertical Axis to FYE Expenditures. 9.
- 10. Change the Horizontal axis name to Month End Dates.
- 11. Change the Vertical axis name to FYE Expenditures.
- 12. Click Done and Save.

END: This concludes this exercise.



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ation of gend	٦	

In the Graph Editor, change the Month End Date List from the Graph Prompts and drag it to the Bars Horizontal Axis.



LESSON 5: SHOWING RESULTS WITH PIVOT TABLES

OBJECTIVES

After completing this lesson, you should be able to:

- Create and edit Pivot Tables
- Format Pivot Tables •
- Use calculations in Pivot Tables

DISPLAYING DATA IN PIVOT TABLE

	Federal	Federal Flow Through	Foreign	Nonfedera
Major Sponsor	Total Volume	Total Volume	Total Volume	Total Volu
Business and Industry	0	1,203,687.37	0	2,920,878
Colleges and Universities	0	1,783,794.56	0	212,570
Foreign	0	0	429,023.03	113,825
Foundation	0	0	0	196,950
Health Organizations	0	0	0	778,308
Multiple	0	23,978.38	0	3,618,986
National Science Foundation	6,590,225.40	0	0	
New York State	0	1,151,317.92	0	8,645,864
Other Federal	111,826.86	0	0	
Private Other	0	2,766,487.99	0	1,128,396
Professional Business Association	0	0	0	148,427
SUNY and SUNY Related Organizations	0	0	0	249,482
Small Business Administration	270,019.79	0	0	
US Department of Commerce	810,428.28	0	0	
US Department of Defense	1,330,507.91	0	0	
IIC Deservation of Education	0.004 745 04	0	0	







Pivot Tables provide the ability to pivot rows, columns, sections, prompts and headings to obtain a different perspective of the same data and can be useful for trending reports. You can drag headings to pivot results and preview them, and apply settings to format and manipulate totals and data comparisons.

To create a Pivot Table you will need to select columns on the Criteria tab. Click the Results tab and select the Pivot Table View.



PIVOT TABLE EDITOR

The columns included in the analysis appear as elements in the pivot table template.

- 1. **Prompts:** Provide an interactive result set
- 2. Sections: Displays information in vertical groupings
- 3. **Rows:** Shows elements in row orientation
- 4. Excluded: Excludes elements from results
- 5. Columns: Shows elements in column orientation
- 6. **Measures:** Populates the pivot table with summary data

🖴 🖻 🖶 🤚 🥶 🕹 🙂 🖬 🔤 🗷 📗

Fact - Financial Reporting

Major Sponsor	Total Volume	Total Volume	Total Volume	Total Volume		
Business and Industry	0	1,203,687.37	0	2,920,878.68		
Colleges and Universities	0	1,783,794.56	0	212,570.97		
Foreign	0	0	429,023.03	113,825.73		
Foundation	0	0	0	196,950.63		
Health Organizations	0	0	0	778,308.36		
Multiple	0	23,978.38	0	3,618,986.19		
National Science Foundation	6,590,225.40	0	0	0		
Layout						
Drop here for a sectioned Pivot Pivot Table					Columns 🛐 🗉	5
					Award Type	Award Type
					Manager Labola	
					measure Labels	-Qi
Rows 😝 📾 (3)					Measures 6	¢
Rows 🛃 📷 3					Measures 6	Reporting

USING TOTALS

To show the total before or after the data items, choose Before or After.

For example, if you add a total on a row for **Major Sponsor** and you specify the **After** option, the total is shown after the individual **Major Sponsors** are listed.

Major Sponsor	Award Type	Total Volume		Health Organizations	Mana
Business and Industry	Federal Flow Through	1,203,687.37		A Layout	None
	Nonfederal	2,920,878.68		1	Before
Business and Industry Total		4,124,566.05		Pivot Table	After
Colleges and Universities	Federal Flow Through	1,783,794.56			At the Beginning
	Nonfederal	212,570.97			At the End
Colleges and Universities Total		1,996,365.53			ALLING LING
Foreign	Foreign	429,023.03			Labels Only (no totals
	Nonfederal	113,825.73		Rows 📷 📷	Format Labels
Foreign Total		542,848.76		Samaar	Format Values
Foundation	Nonfederal	196,950.63		sponsor	Format Values
Foundation Total		196,950.63		Major Sponsor	Award Type
Health Organizations	Nonfederal	778,308.36			
Layout					
Pivot Table					
			Columns 📷 📷		
			Measure Labels		
Rows 📝 🔤			Measures		
Sponsor Awar	d Type		Fact - Financial Reporting		
📕 Major Sponsor 🍄 🗾 A	ward Type		Total Volume		
Excluded					
Task Reporting Location Fact	- Financial Reporting				

Excluded 4





LESSON 5: SUMMARY

In this lesson, you should have learned how to:

- Create and edit pivot tables
- Format pivot tables
- Use totals in pivot tables





PRACTICE 5: SHOWING RESULTS WITH PIVOT TABLES

Goal

In this practice, you will use the Pivot Table view to display results.

Time

20 – 25 minutes

Task

You will use a pivot table view to take row, column, and section headings and swap them around to obtain different perspectives of the data. You can also add totals.

Working with Pivot Tables

- Sign into Report Center (if already not signed in) 1.
- 2. Locate analysis you previously worked on "FYE Expenditures" and click on the Results tab.
- 3. On the toolbar, click the New View button and select Pivot Table.
- A pivot table view is added to the bottom of the Compound Layout. It has also been added to the Views pane. 4.
- Click the Edit View button for the Pivot Table view in the Compound Layout to open in the Editor. 5.
- Click on the Edit Pivot Table Properties button to open the Pivot Table properties dialog box. 6.
- 7. **Explore** options that are available.

Pivot Table Properties		@ ×
Data Viewing	 Fixed headers with s Content paging 	crolling content
	Maximum Width	Pixels
	Maximum Height	Pixels
Display Folder & Column Headings	Only column headings 🔻	
Null Values	Include rows with only	y Null values
	Include columns with	only Null values
Row styling	Enable alternate styli	ng Aa
	Alternate	Innermost Column
Master-Detail	Listen to Master-De	tail Events
	Event Channels	
		OK Cancel

- 8. In the **Editor**, drag all columns so that they are as follows:
 - a. Expenditure Category should be under Rows.
 - b. Total Expenditures should be under Measures.
 - Direct and Indirect Expenditures and Task Location Code should all be under Excluded. C.

Working with Totals

- 1. Add Grand Total to each month end by clicking on the Sum button next to Rows.
- 2. Click **Done** and **Save**.
- 3. Go back to the Criteria tab and add the column Task Organization Name.
- 4. Add the following filters to ensure that you are not getting rows returned with \$0.00 expenditures: FYE Expenditure is not equal / is not in 0 or FYE Dc Expenditure is not equal / is not in 0 or FYE Idc Expenditure is not equal / is not in 0
- 5. Click Results.
- Click on the Edit View button to add totals after each Task Organization Name. 6.
- Click on the SUM button and choose After. 7.
- 8. Go into Format Labels and make the following changes:
 - a. Font: Color = Red, Style = Bold, Size = 14
 - b. **Cell:** Background Color = Grey
- 9. Click **Copy** and then OK.



10. Go back into Format Values and click on Paste and then OK.

Caption	
<u>/</u>	ii ii
Font	

- 11. Click Done and Save.
- 12. Analysis should now have totals for each organization that is highlighted in grey with red lettering.

END: This concludes this exercise.





LESSON 6: **CREATING AGENTS TO SCHEDULE REPORTS**

OBJECTIVES

After completing this lesson, you should be able to:

· Create Agents to schedule reports to be sent automatically

HOW AGENTS WORK

Home



SCHEDULING AGENTS





Dashboards V	New Open Signed In As keep
L	Analysis and Interactive Reporting
More v More v	
iable.	Style Template Sub Template Actionable Intelligence
L	A Action
tion /My Folders	
Show More	Details
ied 8/2/2018 12:04:	37 PM
Last Modified 8/2/2	2018 1.
Modified 8/2/2018	12:04:3
8 12:04:38 PM O	wner K
ough - Query 1	I set

Agents allow you to schedule an analysis based on a defined schedule to end users.

There are many ways to **Schedule** Agents;

- 1. Begin on the Home page with a blank agent, you will then need to add the analysis.
- 2. Begin with the analysis, which will then automatically add the analysis to the agent.

	To the	create an Agent , you will have to set up following tabs.
OWALSKI@RFSUNY.ORG	1.	General Tab
	2.	Schedule Tab
	3.	Delivery Content Tab
ctions	4.	Recipients Tab
a runume.	The are	e Condition, Destination and Actions tabs for advanced scheduling.
Q		



CONFIGURE THE GENERAL TAB

	Agent
Over	rview
	General Normal Priority, Use Specified User's Credentials: KELLY.KOWALSKI@RFSUNY.OR
	Schedule Not Scheduled
	Condition Grants At Risk Report - Training
	Delivery Content /My Folders/Grants At Risk Report - Training
General Set the	Schedule Condition Delivery Content Recipients Destinations Actions
General Set the	Schedule Condition Delivery Content Recipients Destinations Actions priority level for this Agent as well as options for impersonating a different user at runtime.
General Set the	Schedule Condition Delivery Content Recipients Destinations Actions priority level for this Agent as well as options for impersonating a different user at runtime. Priority O High
General Set the	Schedule Condition Delivery Content Recipients Destinations Actions priority level for this Agent as well as options for impersonating a different user at runtime. Priority O High O Normal O Low
General Set the	Schedule Condition Delivery Content Recipients Destinations Actions priority level for this Agent as well as options for impersonating a different user at runtime. Priority High Normal Low Run As Recipient

General Tab

Priority: Specify the priority of the delivery content that an agent is to deliver and how to send the delivery content.

Run As: Select Specified User - your email address will automatically be populated.

CONFIGURE THE SCHEDULE TAB





ontent	Recipients	Destinations	Act	ions		
o run?						
		Every	1	^	*	Days
:00 PM	Defa	ult				
utes						
	👸 Defa	ult				
Select e	end date 08	/24/2018				
Recipi	ents Destina	tions Actions				
Recipi	ents Destina	tions Actions				
Recipi	ents Destina	tions Actions	ary	2	Mar	ch
Recipi	ents Destina ▼ M ☑ January □ April	tions Actions	ary	2	Mar	ch
Recips	ents Destina ▼ M Ø January □ April □ July	tions Actions □ Februa ☑ May ☑ Augus	ary t		Mar Juni	ch e Aember
Recipi	ents Destina ✓ M Ø January April July Ø October	☐ Februa ☑ May ☑ Augus ☐ Noven	ary t nber		[Mar]Juni]Sep	ch e tember ember
Recipi	ents Destina	☐ Februa ☑ May ☑ Augus ☐ Noven	ary t nber		Mar Jun Sep Dec	ch e tember ember
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Schedule Tab

The Schedule tab specifies when an agent runs, how often it runs, and when it should be discontinued. There are three parts to an Agent schedule:

- Start date and time
- Frequency
- End date and time

Use the Frequency drop-down list to specify how often the agent runs.

Selecting Never creates a nonscheduled agent.



CONFIGURE THE DELIVERY CONTENT TAB

General	Schedule	Conditio	n Delivery Content	Recipie	ents Destina	ations	Actions	
Specify	the content	to deliver v	vith the Agent					
	1	Subject	Grants at Risk Monthl	y Report				
		Content	Condition Analysis 🔻	Browse	Customize	Clear		
	-		/My Folders/Grants At	Risk Repor	rt - Training			
	2	Format	Excel 2007+	•				
	3	Delivery	 Deliver results direction Deliver as attachme 	tly nt				
			Attachment Note					
		4	Please see the atta	ached repo	rt.			^
								~
	If Condition	n is False	Deliver this message	ge				
		5	The report has retu	imed no da	ata.			~
								~

Delivery Content Tab

Specify the content to be delivered by the agent. You can specify the following:

- 1. **Subject:** The subject line to include with the content
- 2. **Format:** The delivery format for the content such as PDF or Excel.
- 3. **Delivery:** Recommended setting is to Deliver as attachment.
- 4. **Attachment Note:** You can attach a note that will be part of the email body.
- 5. **If Condition is False:** Select the "If Condition is False" check box to specify whether to deliver a text message to the recipient when there is no agent content to deliver to them and then enter the text message to be delivered.

CONFIGURE THE RECIPIENTS TAB

ouncrui	ouncould	oonalion	beinery content		Second Frederic
Direc Specify Select	t Agent Reci y who will recei Recipients	pients ve this Agent	L.,	1	Use Analysis
Show	All		•	+ 🕰	Get Recipients from the Analysis Used in the Analysis Grants At Risk Report - Training
	Name			*	
					Add email recipient

Publish for Subscription Enable this Agent to be published and determine which users can subscribe to this Agent. Publish Agent for subscription Allow subscribers to customize Agent

Enter Email Address	@ ×
Email address for content delivery (separate	multiple addresses with com
john.doe@rfsuny, jane.doe@rfsuny.org	^
	~
	OK Cancel





Recipients Tab

Specify who should receive the delivery content of the agent.

- 1. Add email recipients by clicking on the email icon.
- 2. Enter one or more email addresses, separated by commas, and click OK.



LESSON 6: SUMMARY

In this lesson, you should have learned how to:

Create Agents





PRACTICE 6: CREATING AGENTS TO SCHEDULE REPORTS

Goal

In this practice, you will create an agent.

Time

10 - 15 minutes

Task

You will create an agent to schedule a report.

Create an Agent

- 1. Sign into Report Center (if already not signed in)
- 2. Click New > Agent in the Global Header to navigate to the Agent Editor.

General Tab

- In the Agent Editor, start on the General tab to specify the priority of the agent and how to send the delivery a. content.
- Set the following values: b. Priority = Normal Run As = Recipient

Schedule Tab

- Click the Schedule tab to set the schedule. a.
- Set frequency to Once. b.
- Confirm that the start date and time are set to the current date and time. C.
- d. Leave all other settings as they are.

Delivery Tab

- Click the **Delivery Content** tab to identify the content that will be delivered by the agent. a.
- Enter 'FYE Expenditures Test Agent' as the Subject. b.
- Select Analysis in the Content drop down list. C.
- Click Browse to open the Choose Delivery Content dialog box. d.
- Locate the analysis we just created and click OK. e.
- Choose the Format Excel 2007+. f
- Delivery should be set to Deliver as Attachment. g.
- Add Attachment note. h.

Recipients Tab

- Click the **Recipients** tab to identify the recipients of the agent. a.
- b. Click on the Email icon to add recipients.
- Enter YOUR email address for content delivery. (Separate multiple email addresses with commas) C.
- d. Click OK

Save the Agent

- a. Click the Save button to save the agent.
- b. In the Save Agent dialog box, save the agent as 'FYE Expenditures Test Agent'

Test the Agent

1. Click the **Run Agent Now** button.



- 2. Verify that the agent is running in the **Running Agent** dialog box.
- When the agent has run successfully, you should receive a confirmation. 3.
- 4. Click OK.
- 5. Access your email account and check to see if you have received your scheduled report.

Note: If you are unable to check this, you can check this when you have access to your email account.

END: This concludes this exercise.



REPORT CENTER TERMINOLOGY

NAME	KEY DEFINITION
Agents	Agents enable you to automate business processes by scheduling reports and delivering alerts.
Alerts	An alert is a notification that is generated by an agent.
Analyses	Answers a query against an organization's data. Also known as report.
Analysis Editor	The Analysis editor lets you explore and interact with information by visually presenting data in tables, graphs, pivot tables, and so on.
Column	Represents data that an analysis returns. Also known as data fields.
Conditions	Conditions are objects that return a single value that is based on the evaluation of an analysis.
Criteria	Set of columns, filters, formatting, and properties for a specific analysis.
Dashboards	Dashboards provide personalized views of business information. A dashboard consists of one or more pages that contain analyses and drills.
Filter	Filters limit or specify the data that is displayed in dashboards or analyses.
Home Page	The Home page is divided into sections that enable you to quickly begin specific tasks.
Prompts	Prompts limit or specify the data that is displayed in dashboards or analyses.
Results	Output of data returned for a specific analysis.
Subject Area	Area that contains data about a specific business area.

