The Research Foundation for
The State University of New York

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

TABLE OF CONTENTS

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
- Access dashboards

NAVIGATION

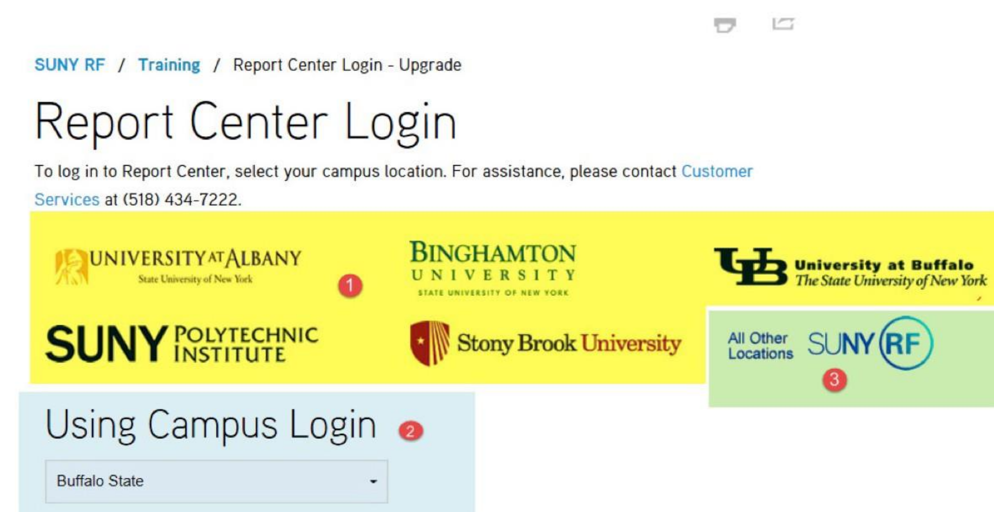
How do I get access?

- Supervisor sends requests to **CustomerServices@rfsuny.org**

How do I sign into the Report Center?

- SSO Federated Campuses
- All other campuses

HOW DO I ACCESS THE REPORT CENTER?



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.

LET'S TALK ABOUT DATA

Where does the data come from?

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

How does the data get there?

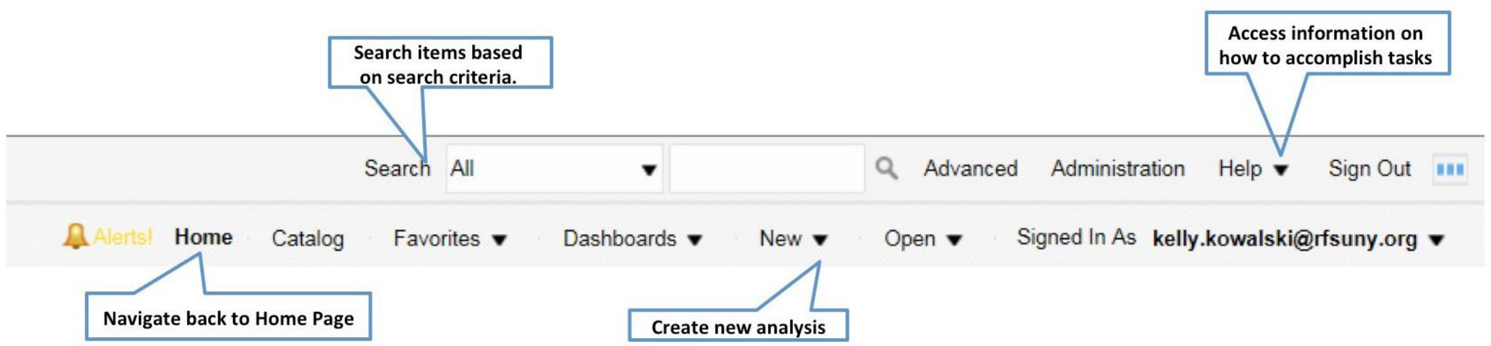
- Nightly Schedule process

When is the data available in the Report Center?

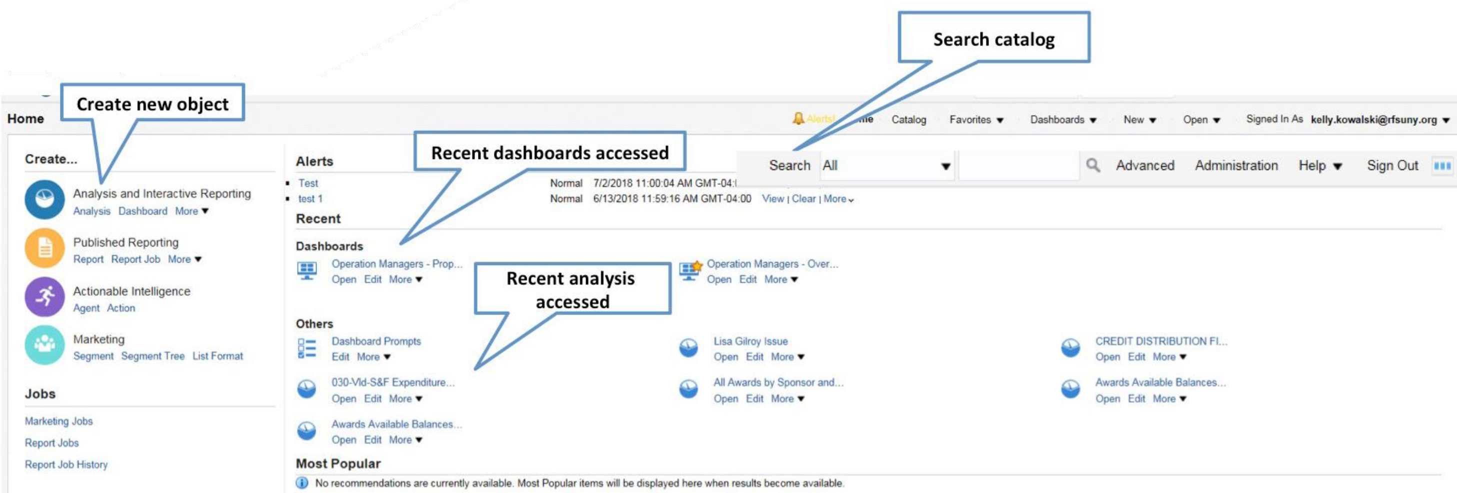
- Next business day

GLOBAL HEADER

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



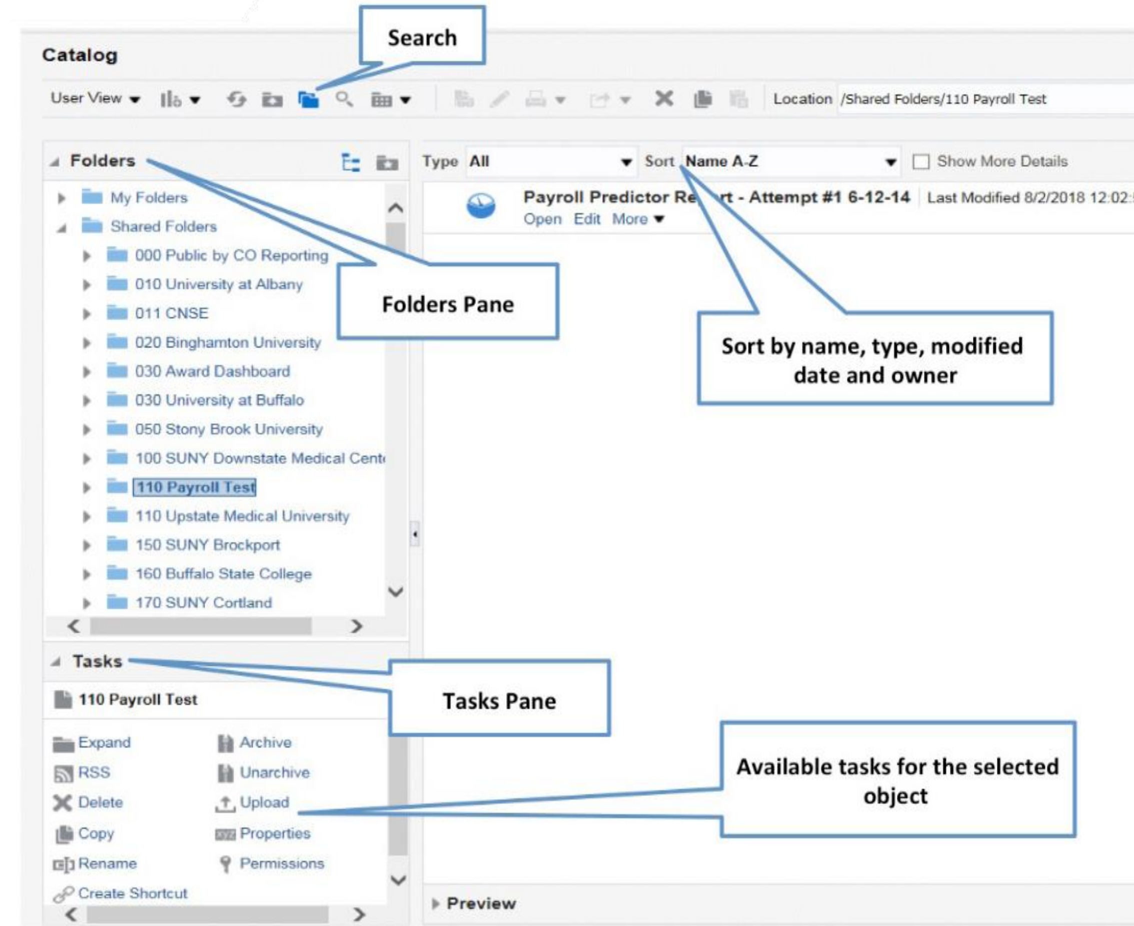
HOME PAGE



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

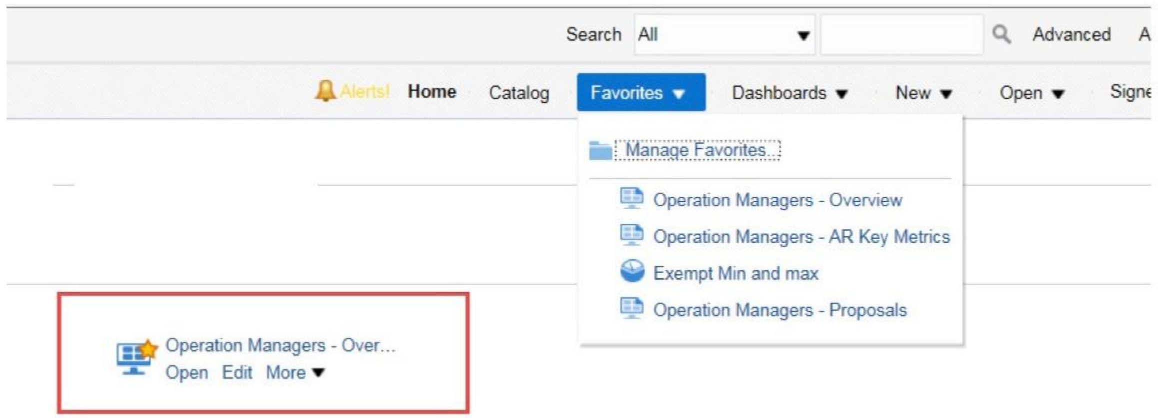


The catalog is organized into folders that are either shared or personal. **My Folders** contains all the objects that you have created. This folder is restricted and only the user has access.

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.

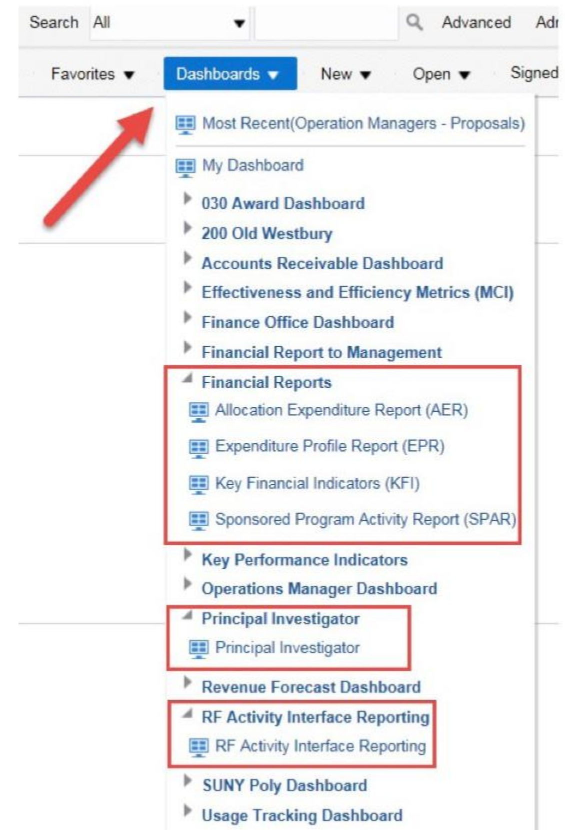
FAVORITES



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

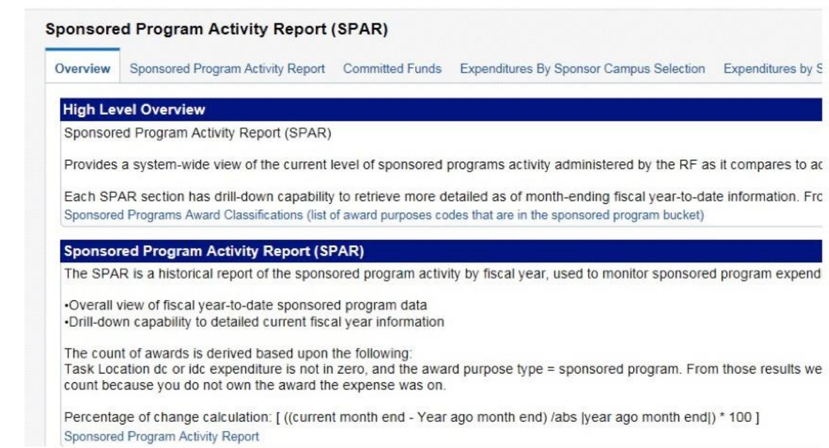
You can access **Manage Favorites** to organize your favorites.

DASHBOARDS

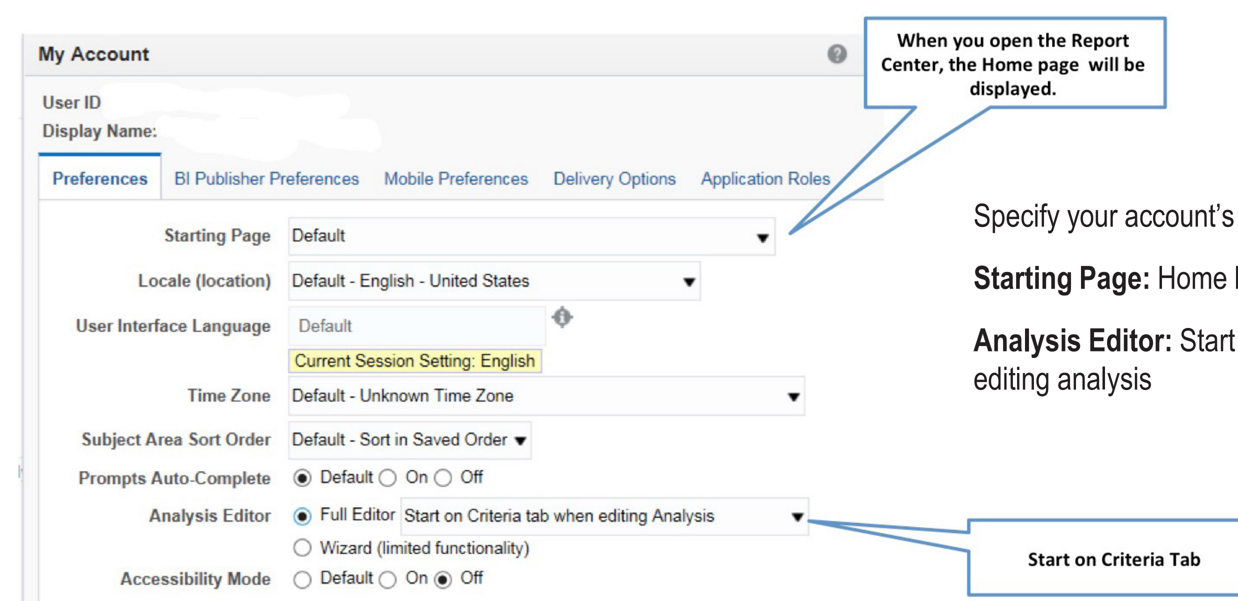


Available dashboards appear in the **Dashboards** drop down list. The availability is based upon user access that has been assigned.

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



ACCOUNT PREFERENCES



Specify your account's display preferences:

Starting Page: Home Page

Analysis Editor: Start on Criteria tab when editing analysis

LESSON 1: SUMMARY

In this lesson, you should have learned how to:

- Navigate within the Report Center
- Navigate 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

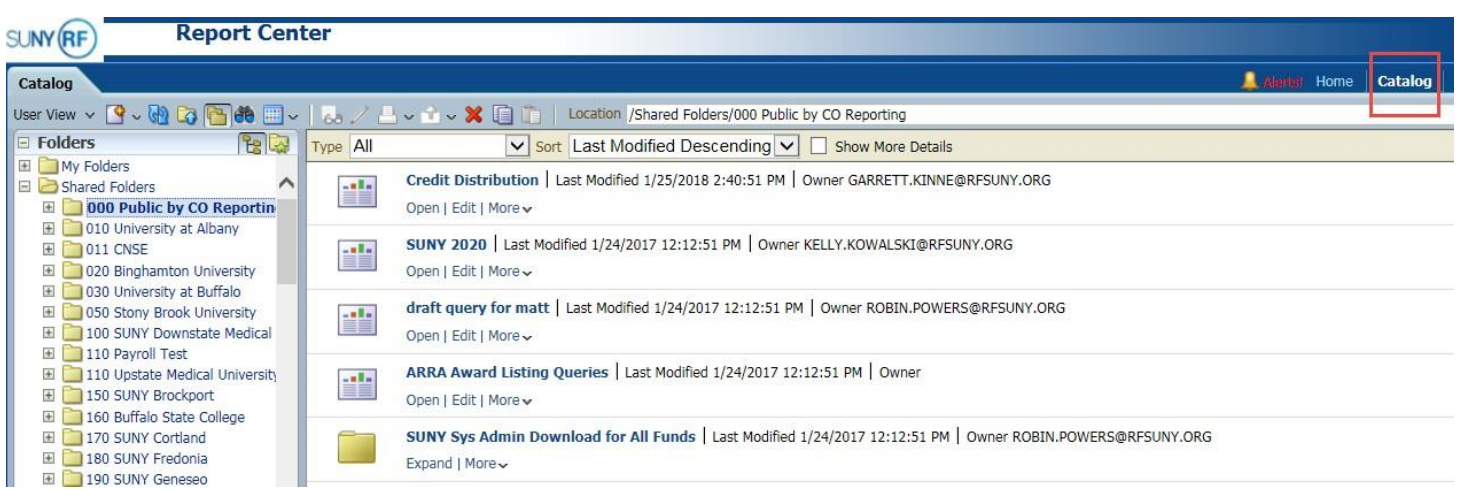
1. Sign into Report Center
   a. In a browser,
   b. On the sign in screen, enter the user ID and password as provided by your instructor.
   c. Click Sign – The Home page is displayed.

2. In the left pane of the Home page, notice the Create section, which provides quick access to create new analyses and agents.

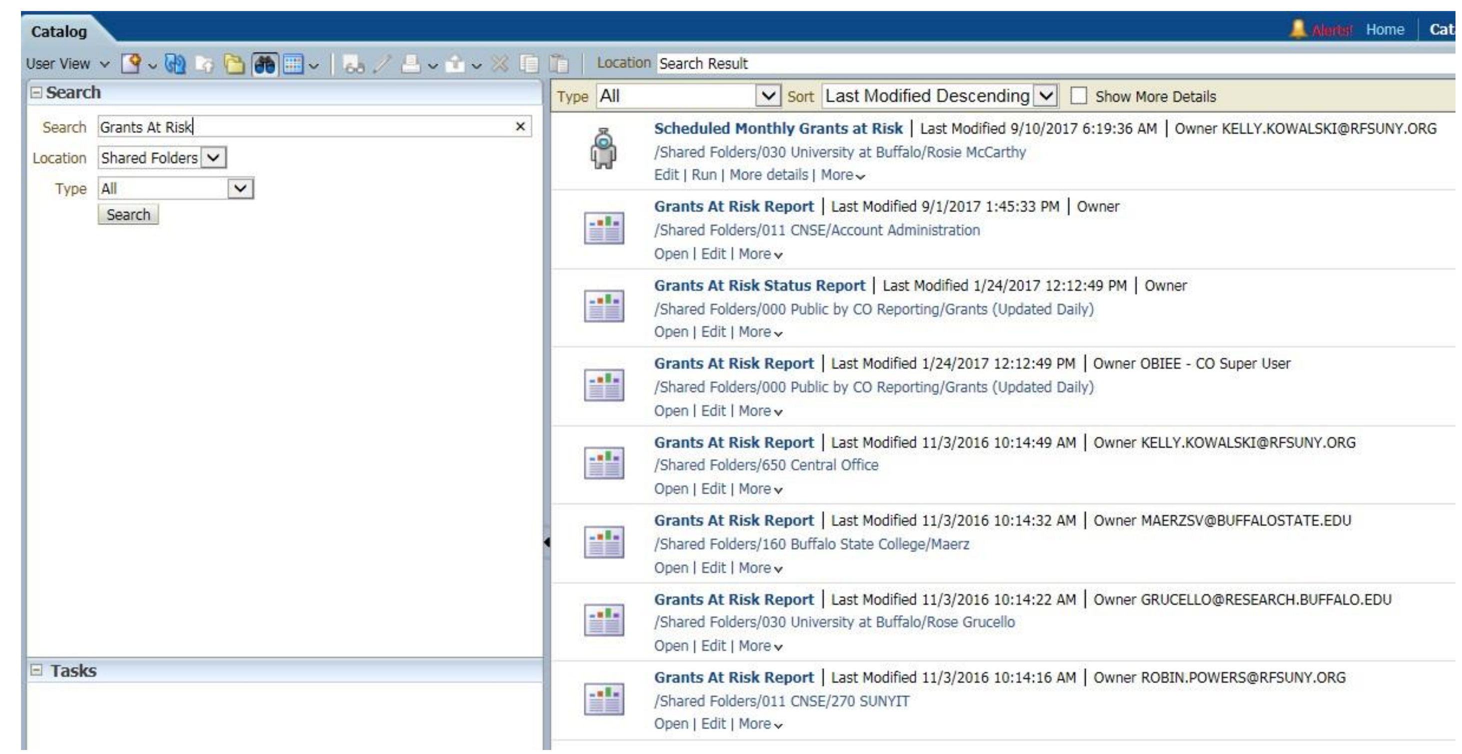
Browsing Report Center

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. Expand the Location drop-down list and notice that you can search My Folder, Shared Folders or All locations.
   c. Expand the Type drop-down and notice that you can search by any catalog object type.
   d. Enter Grants at Risk in the Search field, select All in both the Location and Type drop-down lists, and click Search to search the Catalog for the analyses that pertain to Grants at Risk.



3. Access Report Center Dashboards:
   a. Click **Dashboards** on the Global Header to display the drop-down list of all the available dashboards that you have access to.

END: This concludes this exercise.

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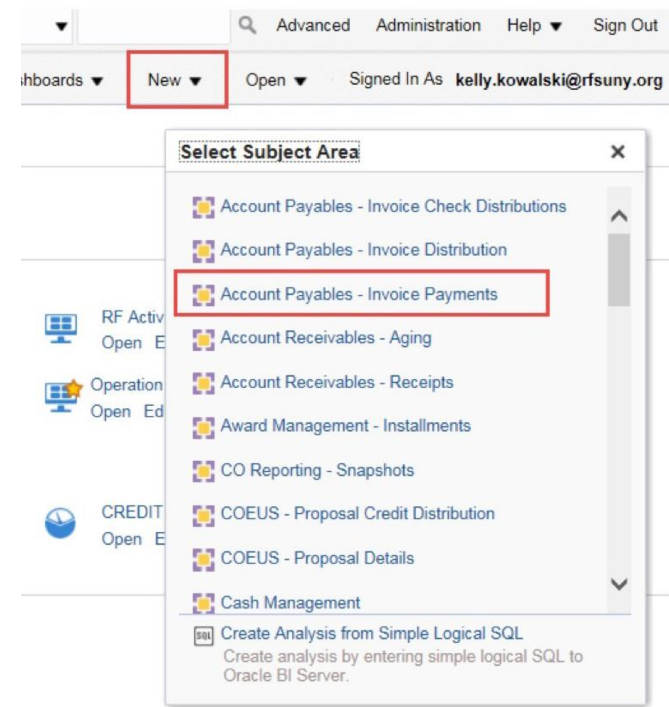
LESSON 2:
WORKING WITH ANALYSES

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

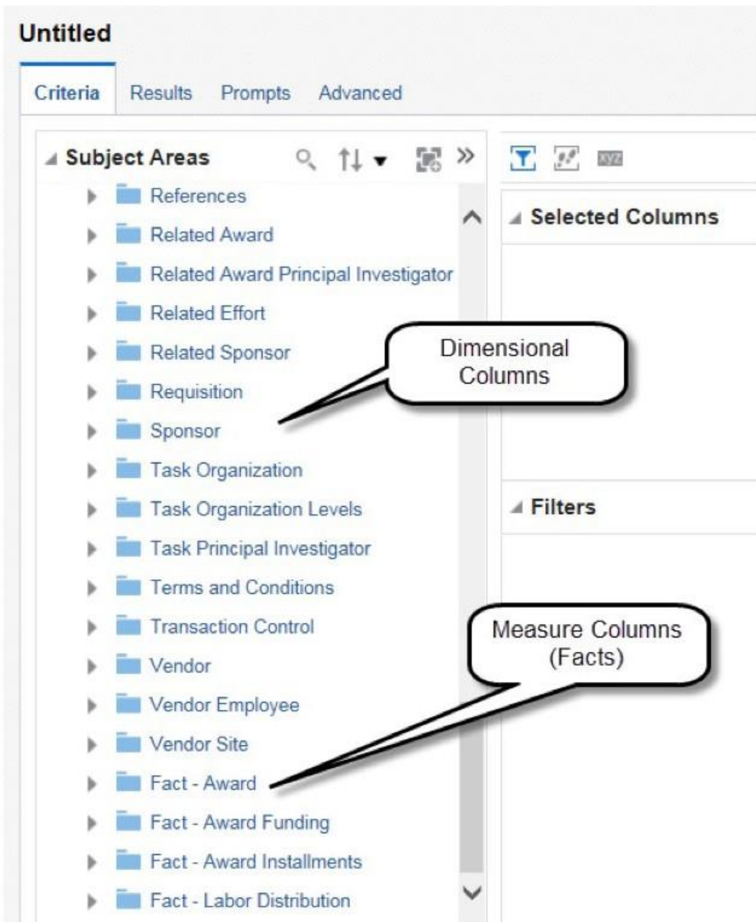


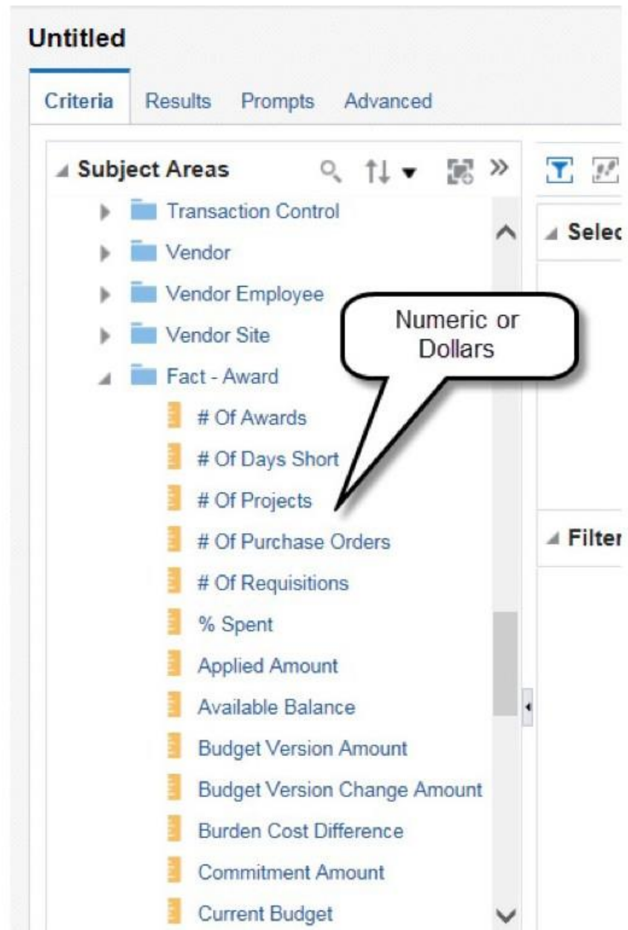
Subject Areas contain information about the specific business area.

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.

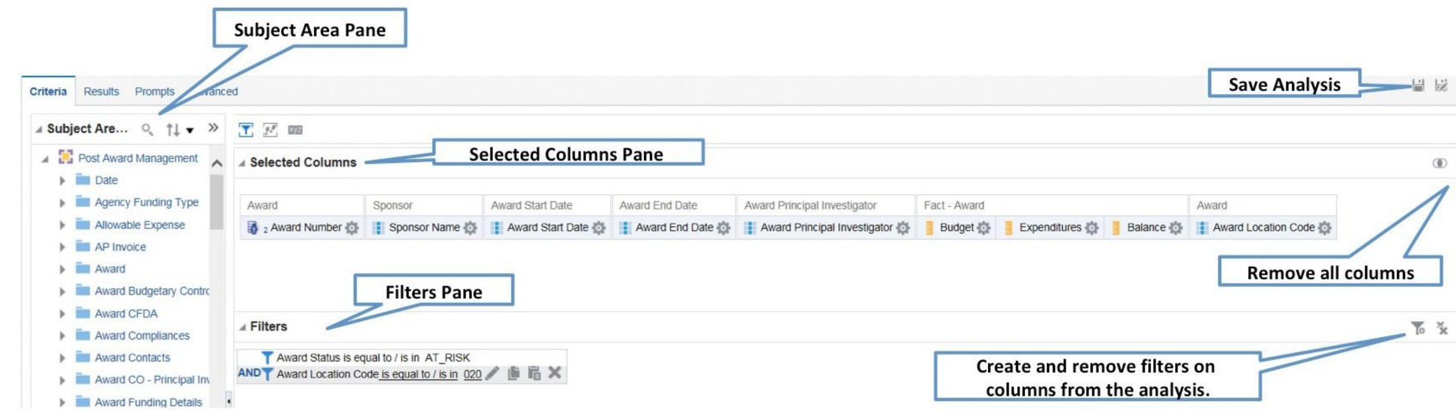
There are two types of columns.

Dimensional Columns: Columns similar to columns in a table.

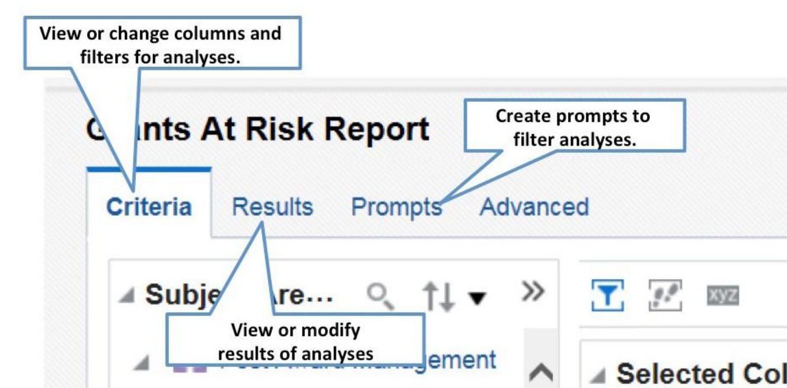
Measure Columns: Also called Facts, contain data values, usually numeric or dollars that can be added up.

ANALYSIS EDITOR

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



ANALYSIS EDITOR TABS

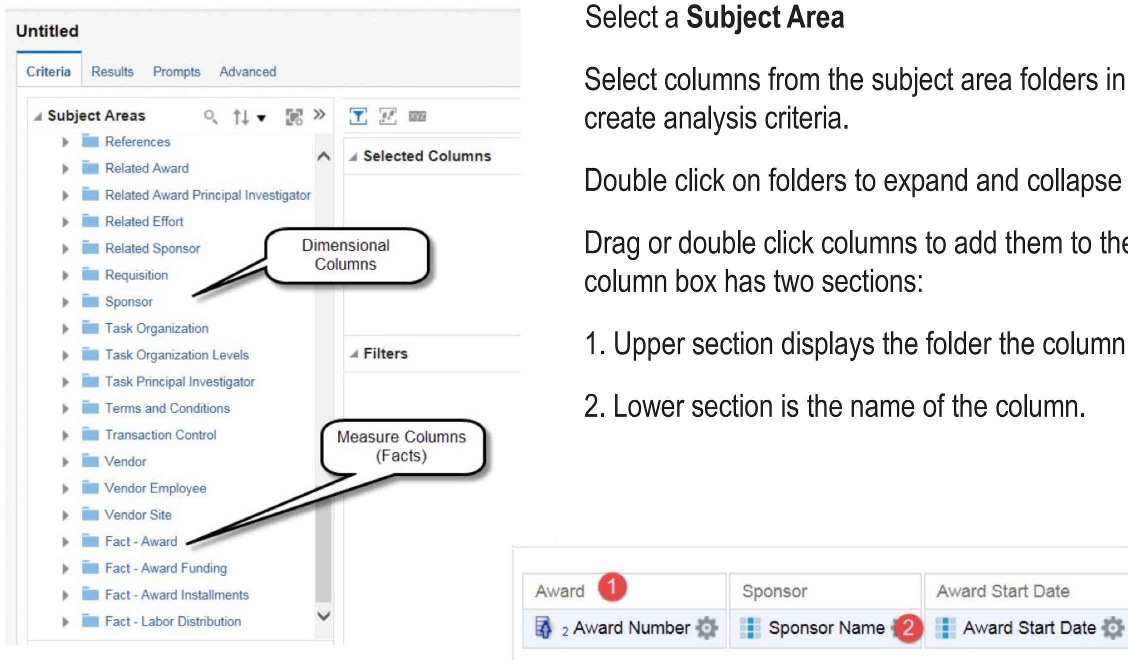


Criteria: To specify and modify the criteria, formatting, and other aspects of an analysis, including columns and filters.

Results: To create different views of the analysis results such as graphs and pivot tables.

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

CREATE AN ANALYSIS



Select a **Subject Area**

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

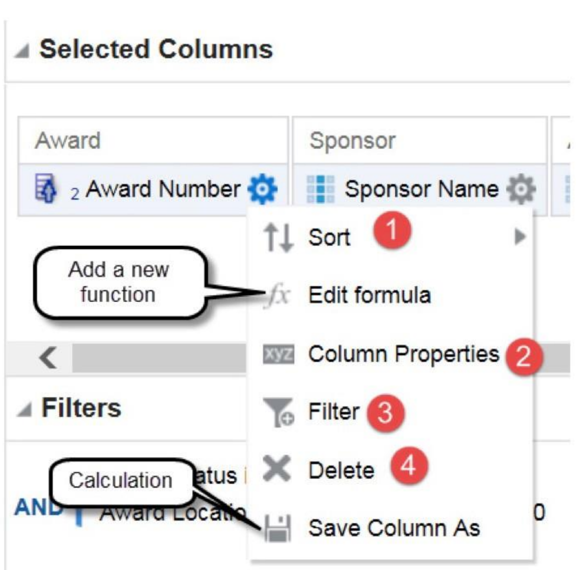
Double click on folders to expand and collapse them.

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.

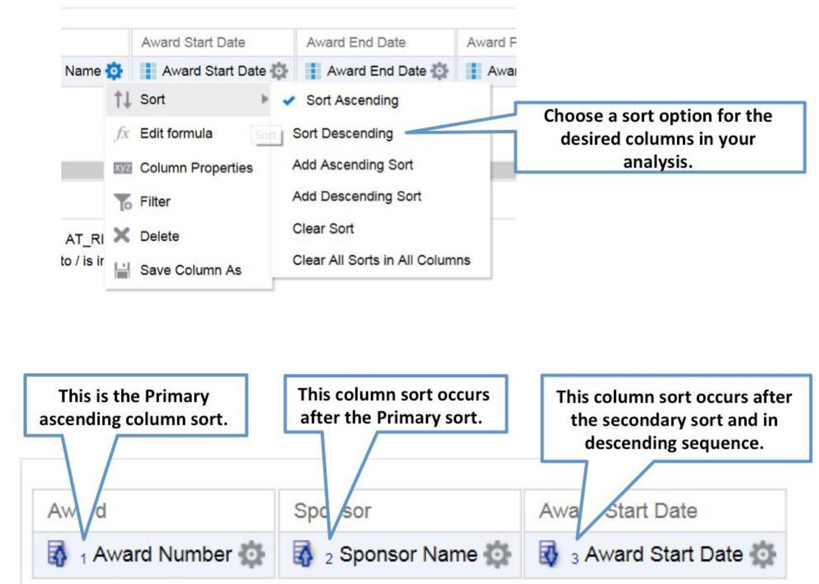
MODIFY ANALYSIS CRITERIA



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 (SORTING COLUMNS)



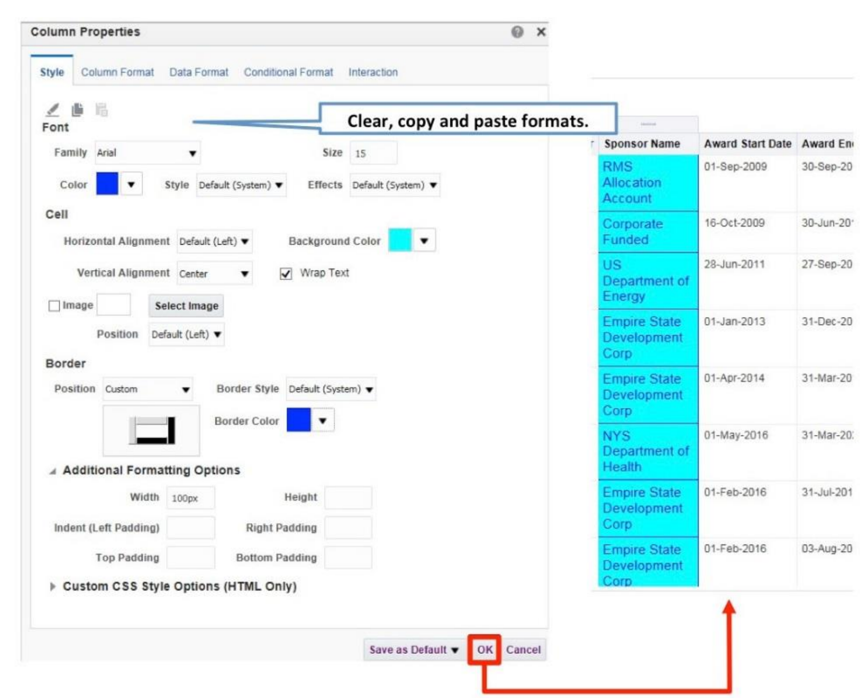
To set the primary sort, select **Sort Ascending** or **Sort Descending**, depending whether you want the sort to be ascending or descending.

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.**

MODIFY ANALYSIS CRITERIA (STYLE)



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.

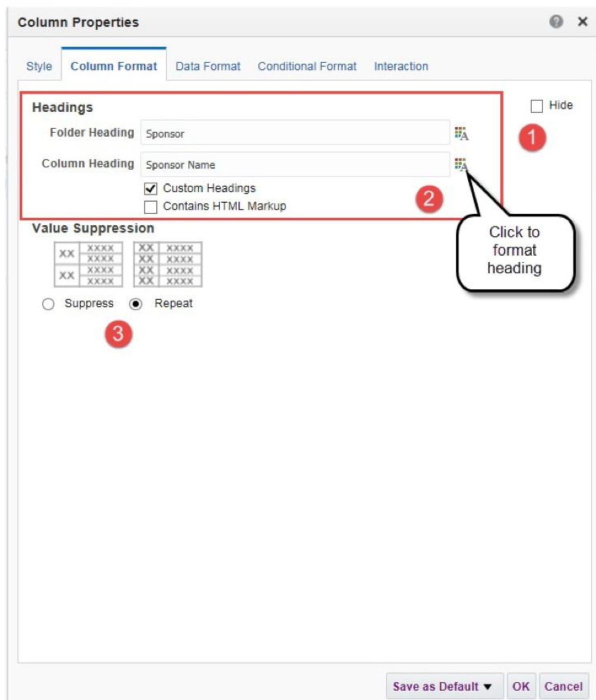
In the **Font** area, you can specify the font family, size, and color as well as style and effect options such as bold.

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.

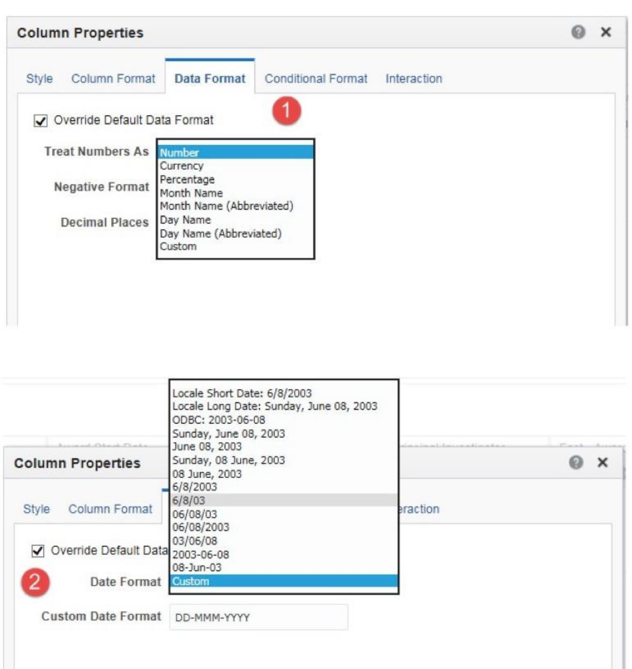
MODIFY ANALYSIS CRITERIA (COLUMN FORMAT)



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

1. Select **Hide** check box to hide the column in the analysis results.
2. 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.
3. 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.

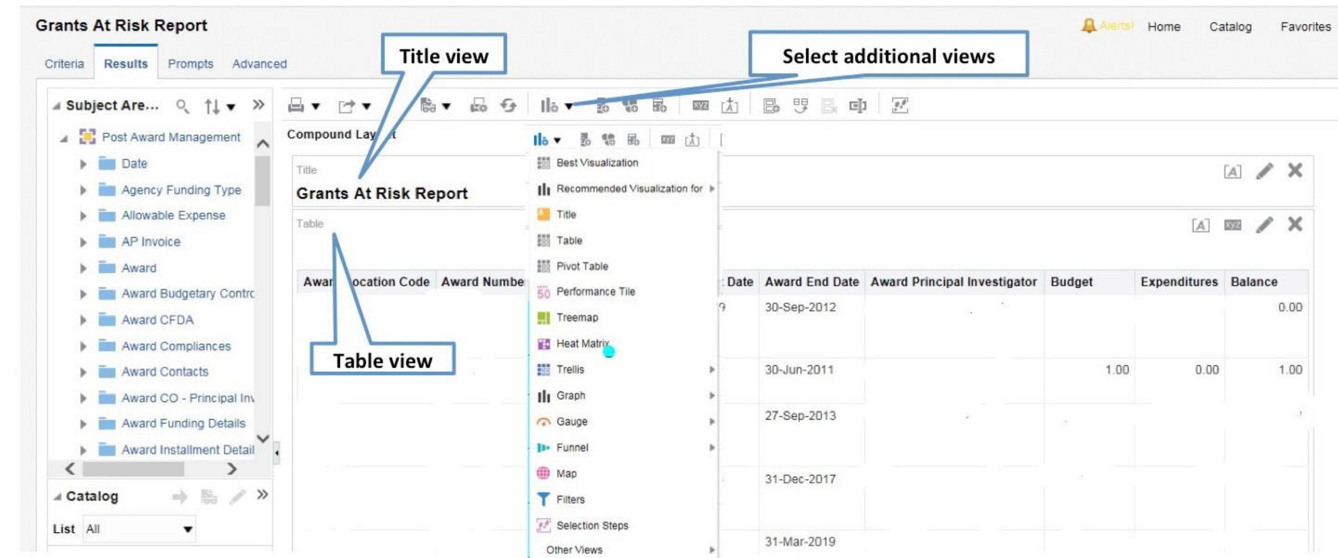
MODIFY ANALYSIS CRITERIA (DATA FORMAT)



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.

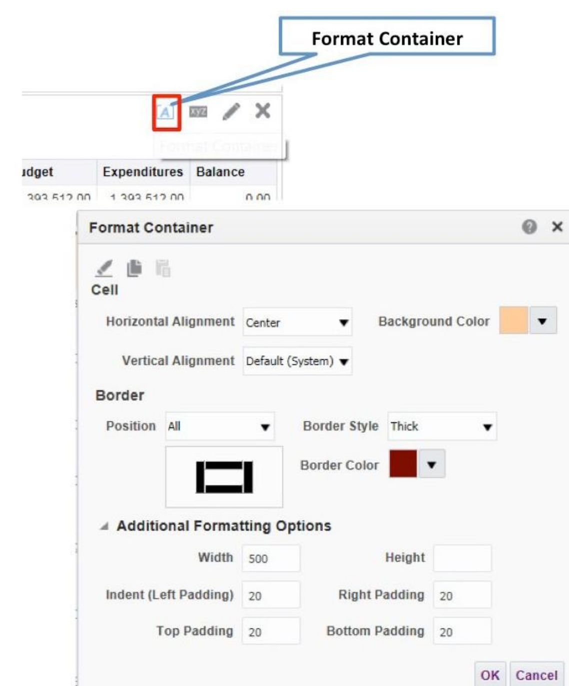
1. In the column that contains **Numeric** data, you can choose how you want the numbers treated (such as percentages and currency). You can choose the number of decimals to display, negative numbers, digits, and thousands separators.
2. In the column that contains **Date**, you can change different date and times zone formats.

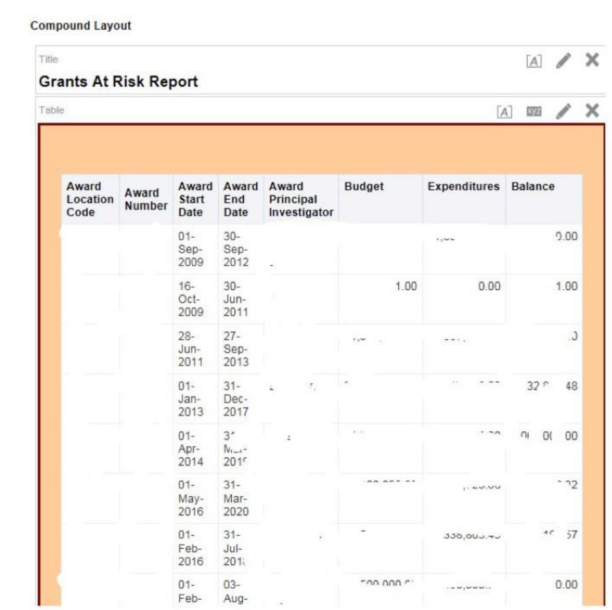
ANALYSIS RESULTS FORMATTING



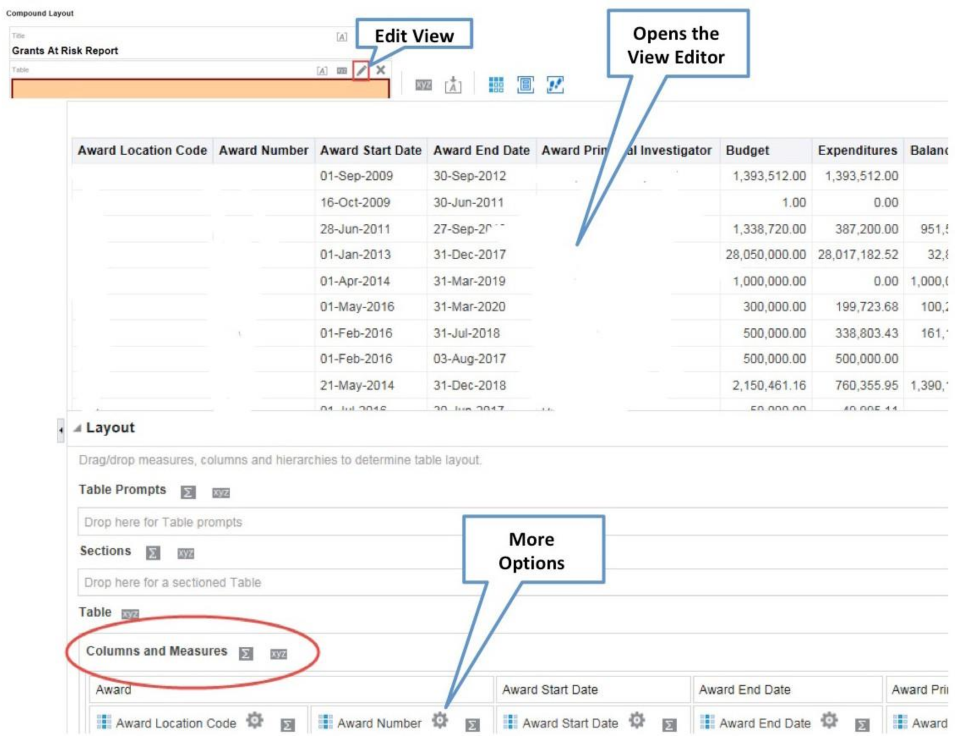
Click the **Results** tab to see the results of an analysis. The **Compound Layout** consists of a **Title** view and a **Table** view. An analysis can be displayed in many formats. You can add more views and formats by using the **New View** button.

ADDING BASIC FORMATTING TO TABLE VIEWS





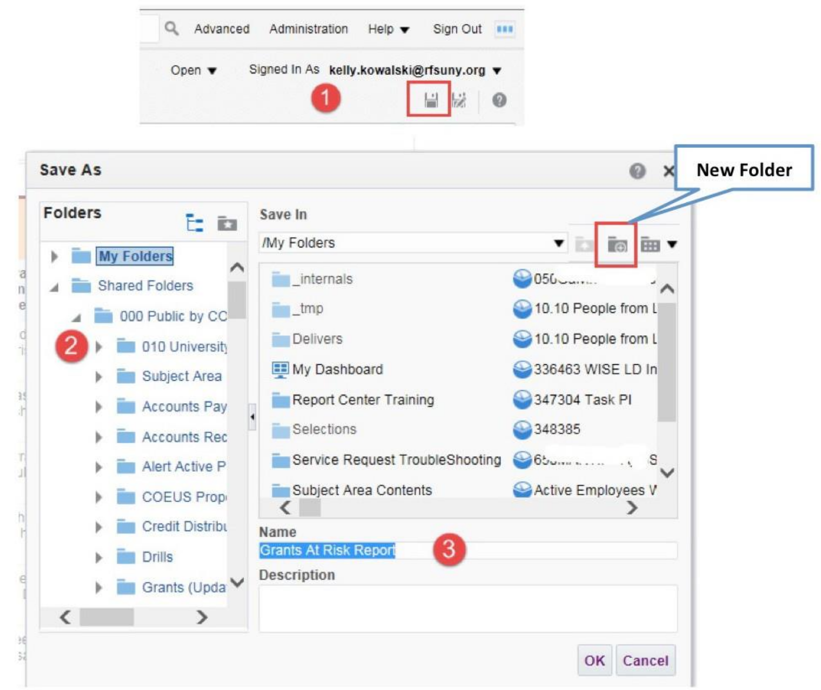
FORMATTING COLUMN HEADERS AND VALUES



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**.

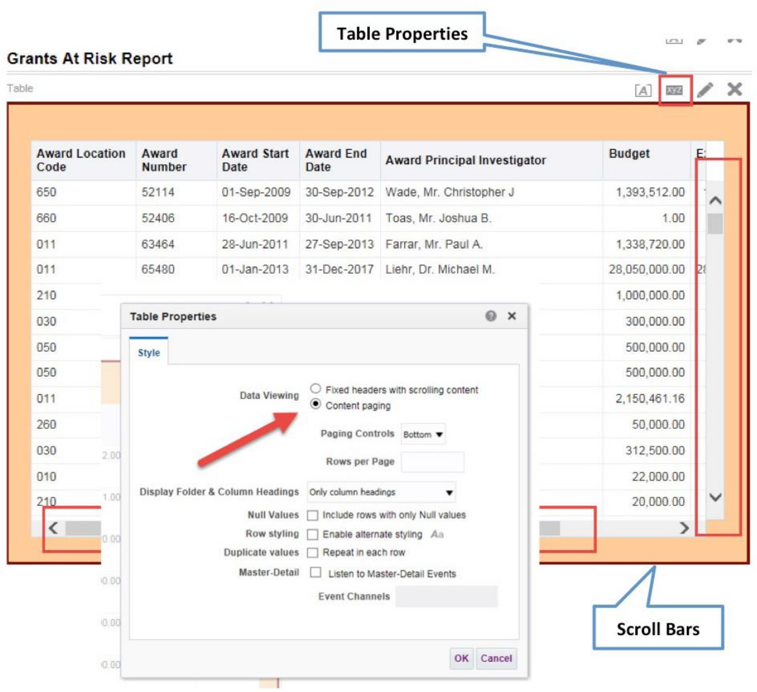
SAVE AN ANALYSIS

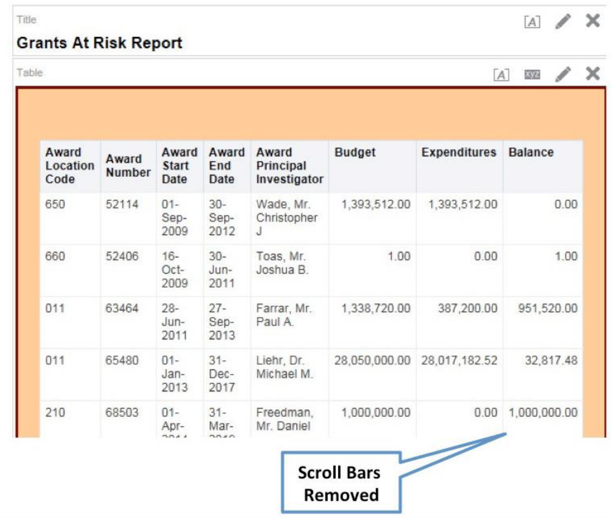


Analyses are saved in folders that are either personal or shared.

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.

DATA VIEWING FORMATTING





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 analyses
- Use Analysis Editor
- Construct, modify, and save analyses

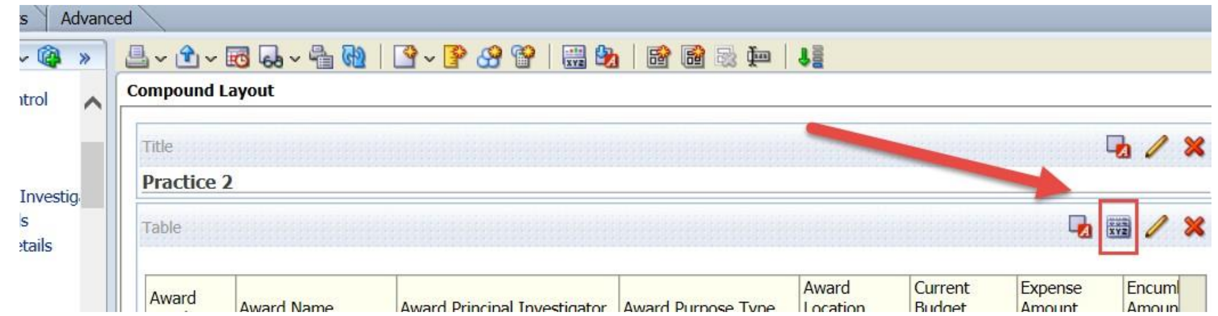
PRACTICE 2: CREATING AND FORMATTING AN ANALYSIS

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

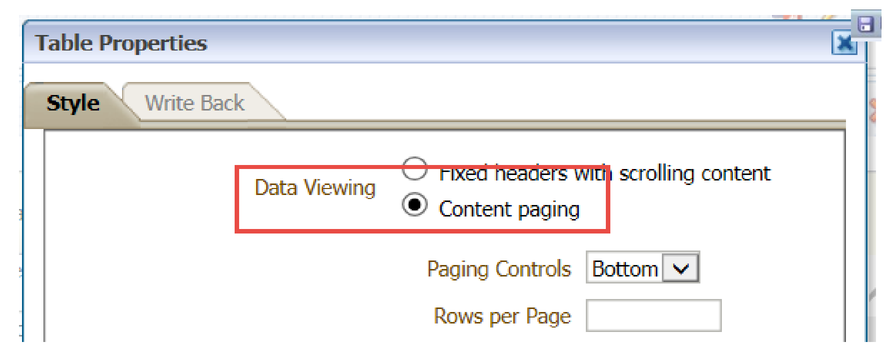
Time
25-30 minutes

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

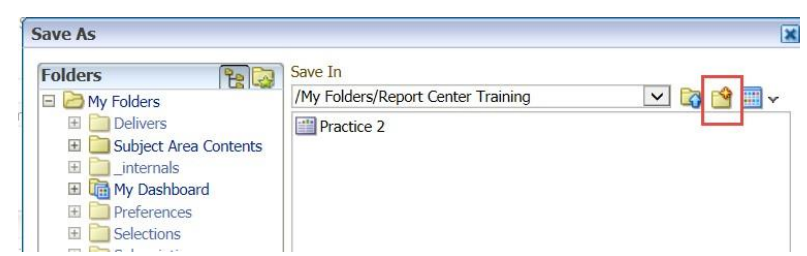
Creating a Basic Analysis
1. Sign into Report Center (if already not signed in)
2. Create an analysis to determine the available balance on specific awards for your location.
    a. On the Home page, in the Create Section, Click **Analysis** to navigate to the analysis editor.
    b. In the Select Subject Area pop up menu, click **Post Award Management**.
    c. Open the **Award** folder and choose the following **Dimensional** columns:
        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:
        i. Current Budget
        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.

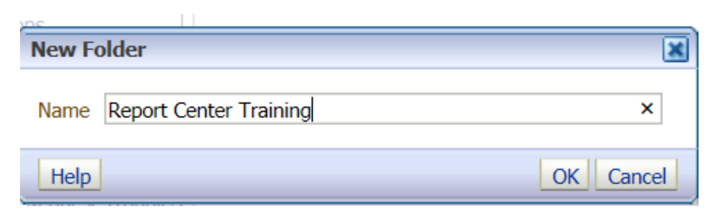


    b. In the Data Viewing section, select Content paging.



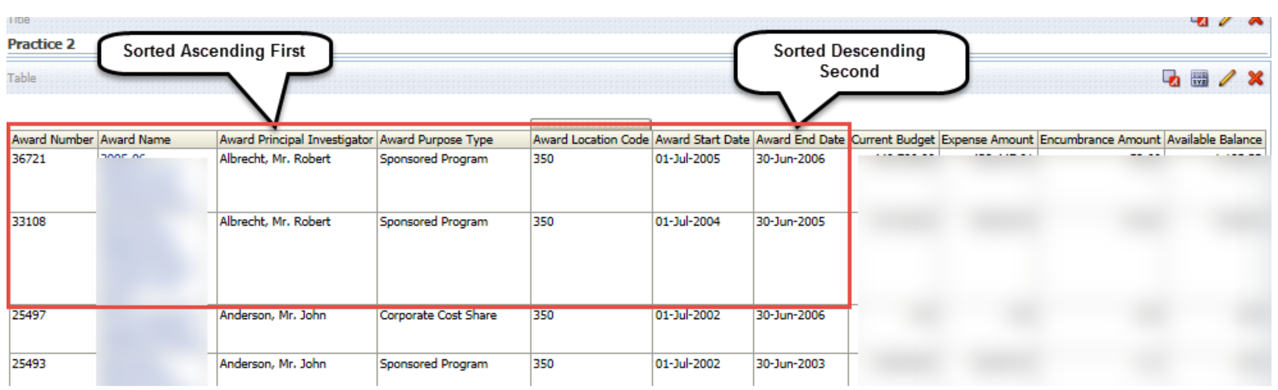
    c. Click OK to accept the other default settings and close the Table Properties dialog box. Notice the scroll bars have disappeared.
4. Save the analysis in a new folder in the **My Folders** section of the **Catalog**.
    a. Click the **Save Analysis** button and the Save As dialog box appears.
    b. Select **My Folders**.
    c. Click the **New Folder** button.
    d. Name the New Folder: ***Report Center Training*** and Click OK as shown below.
    e. Then name the analysis: ***Practice 2***





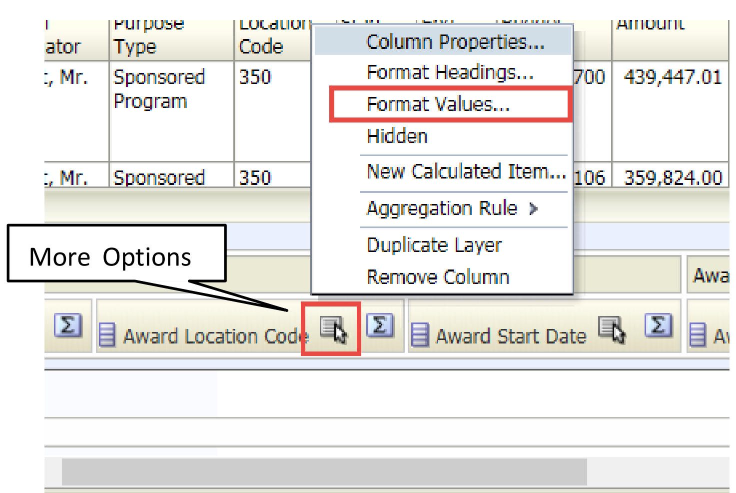
Modifying an Analysis

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.
    c. Select **Sort > Sort Ascending**.
    d. Click the More options button for Award End Date column.
    e. Select **Sort > Add Sort Descending**
    f. Click the **Results** tab to verify the sort as shown below.

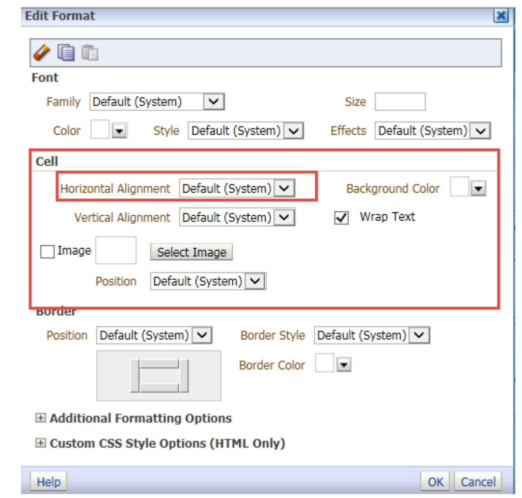


Formatting the Table View

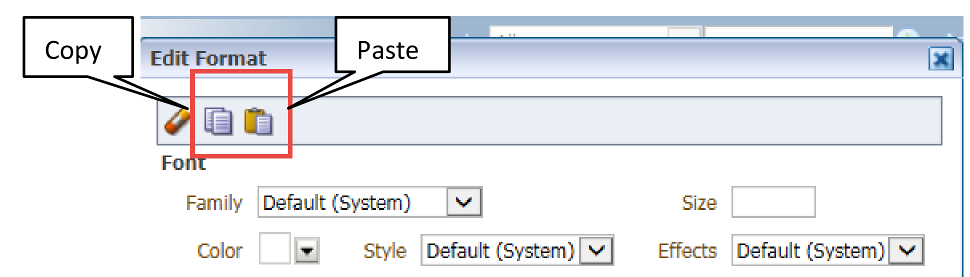
1. Center the alignment of the values of the columns.
    a. Click the Edit View button in Compound Layout.
    b. In the Layout Pane, click the More Options button for **Award Location Code** column and then select **Format Values**. The Edit formula box is displayed.



    i. 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.



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



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

END: This concludes this exercise.

LESSON 3:
FILTERING DATA FOR ANALYSES

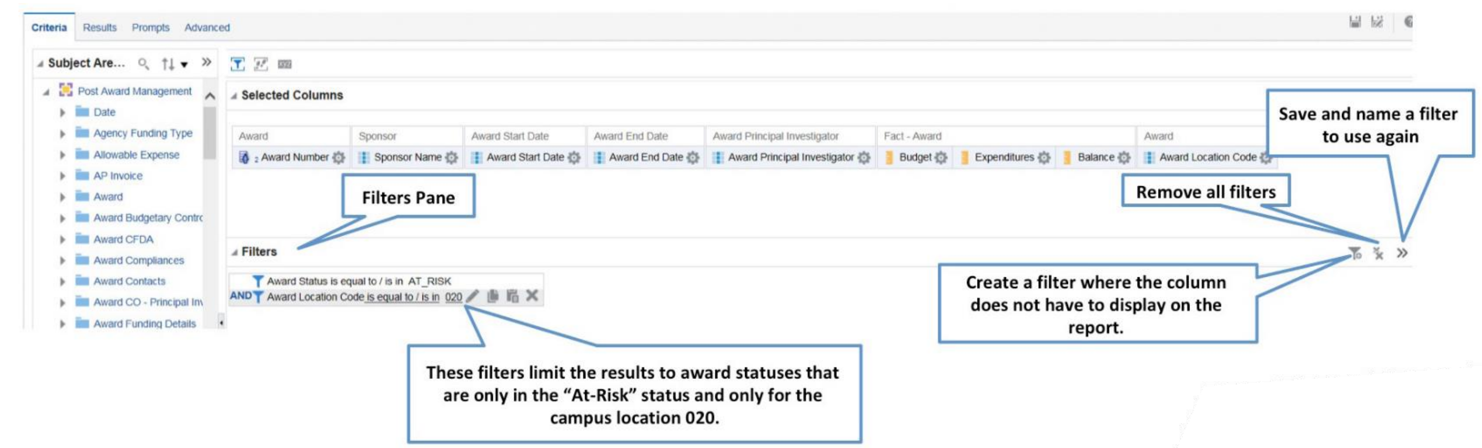
OBJECTIVES

After completing this lesson, you should be able to:

- Create filters to limit your results of analyses

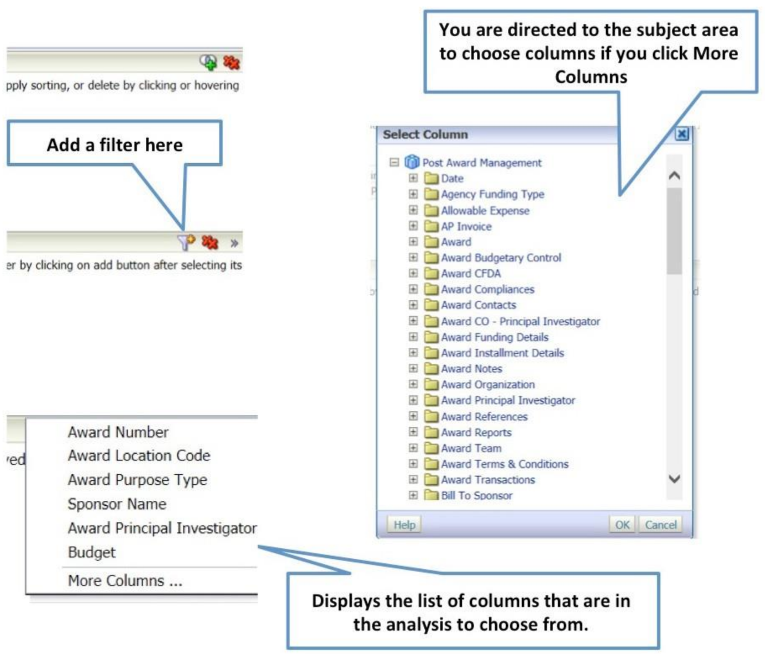
USING FILTERS TO LIMIT DATA

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



CREATING AND EDITING FILTERS

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

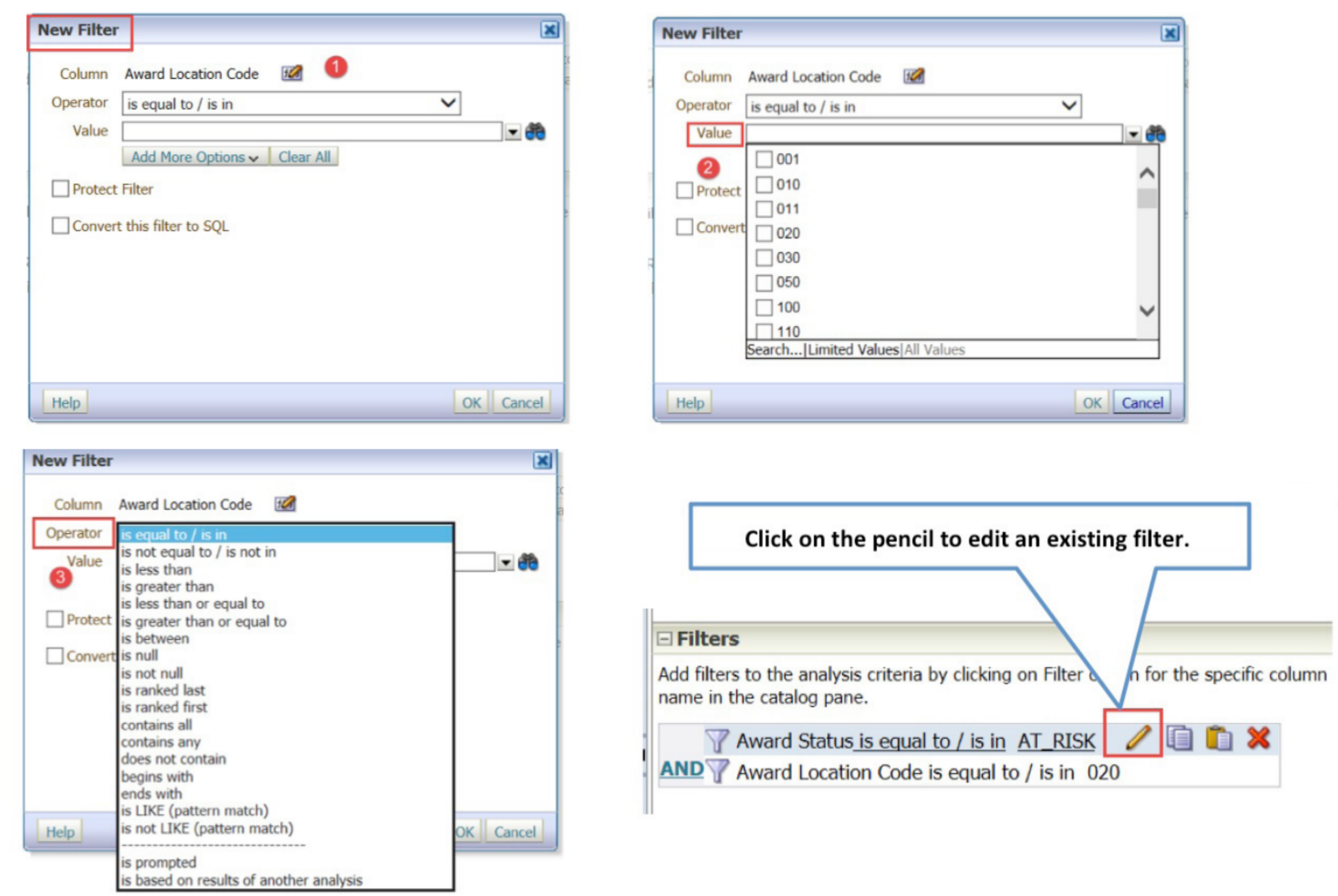


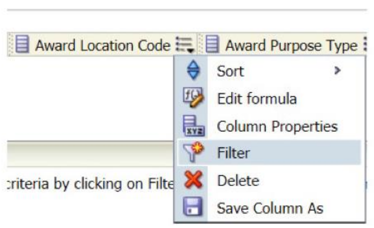
You can also use the **Create/Edit Filter** dialog box to create and edit filters.

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)




Award Location Code
Award Purpose Type
Sort
Edit formula
Column Properties
Filter
Delete
Save Column As


New Filter
Column
Award Location Code
Operator
is equal to / is in
Value
Add More Options
Clear All
Protect Filter
Convert this filter to SQL
Help
OK
Cancel

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

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

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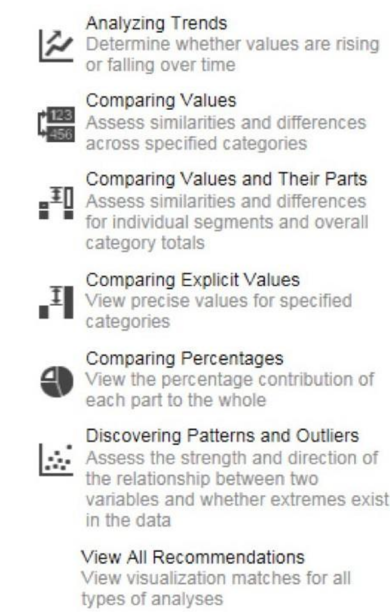
ADVANCED VISUALIZATION IN ANALYSIS

Why use different views?

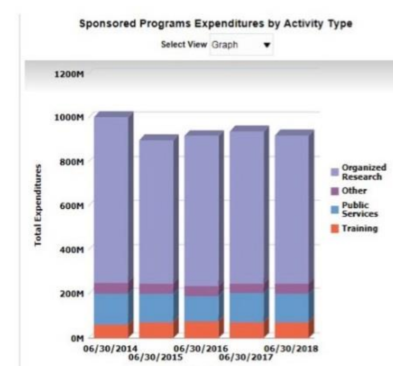
- Helps users look at results in meaningful ways
- Helps to identify trends when you use multiple ways

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



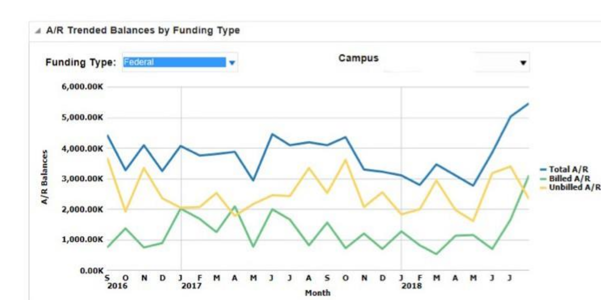
DESCRIPTION OF GRAPH VIEWS

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.

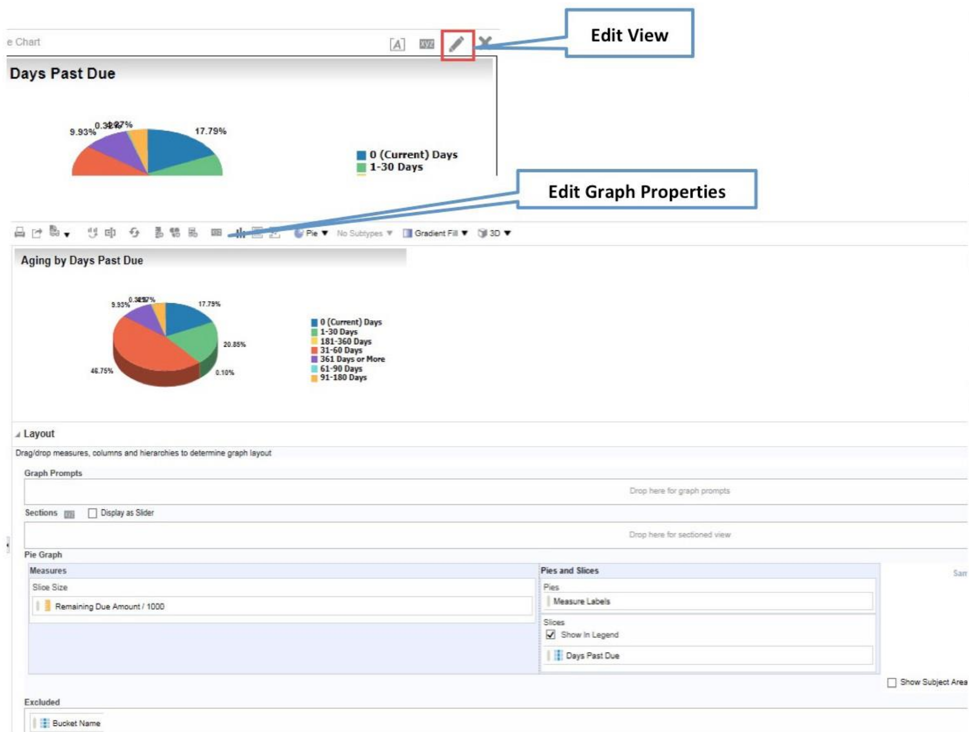


Most Popular

- **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

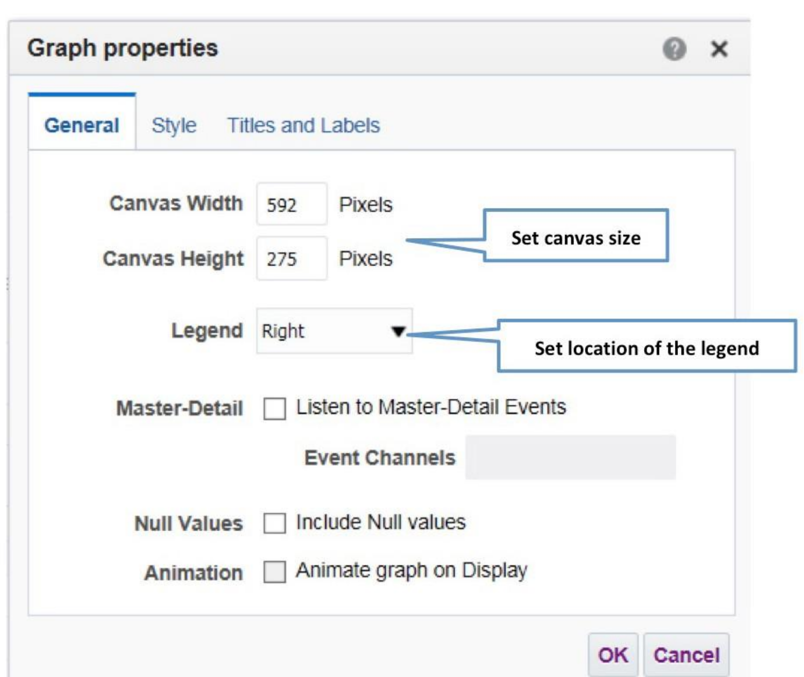


To create or edit a **Graph**, specify its type and then drag analysis columns to the appropriate sections (horizontal axis, vertical axis, legend).

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: GENERAL

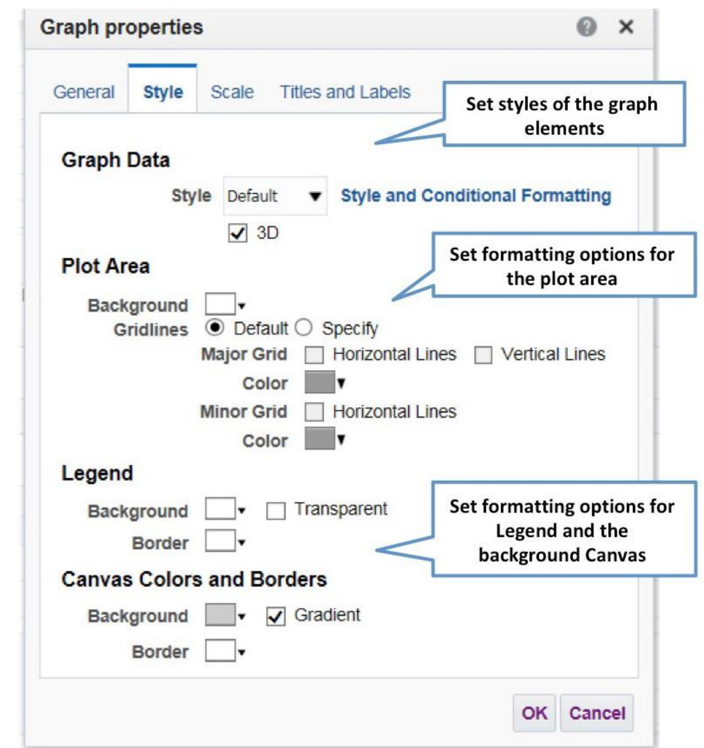


To open the **Graph** properties dialog box, click the **Edit Graph Properties** button in the view editor toolbar.

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: STYLE

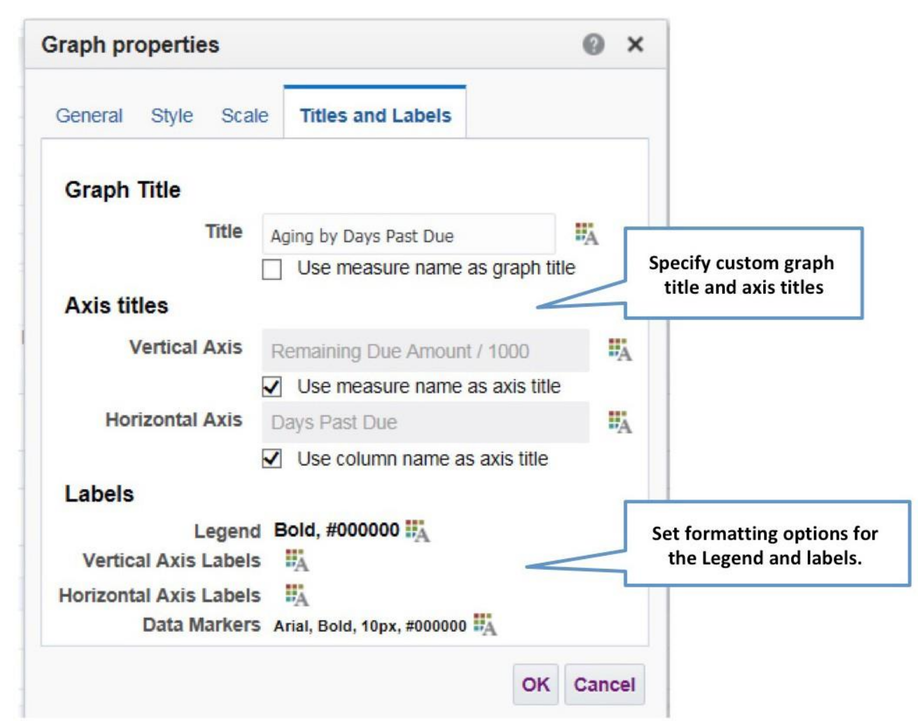


On the **Style** tab of the **Graph Properties** dialog box, you can set properties that can control the appearance of the graph. Each section of the dialog box has options to control different aspects of the graph.

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.

GRAPH PROPERTIES: TITLES AND LABELS



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.

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

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 Idc 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

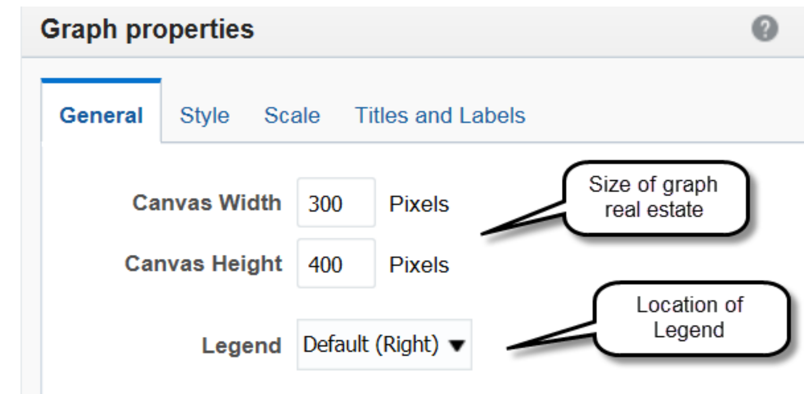
4. Click on the Results tab and ensure the data is accurate.

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



6. In the Graph Editor, change the Month End Date List from the Graph Prompts and drag it to the Bars Horizontal Axis.
7. Drag Task Location Code to the Excluded.
8. Click on **Graph Properties > Style** Tab and change to Cylinder and 3D.
9. Click on **Titles and Labels** and change the **Graph Title** and **Vertical Axis** to FYE Expenditures.
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.

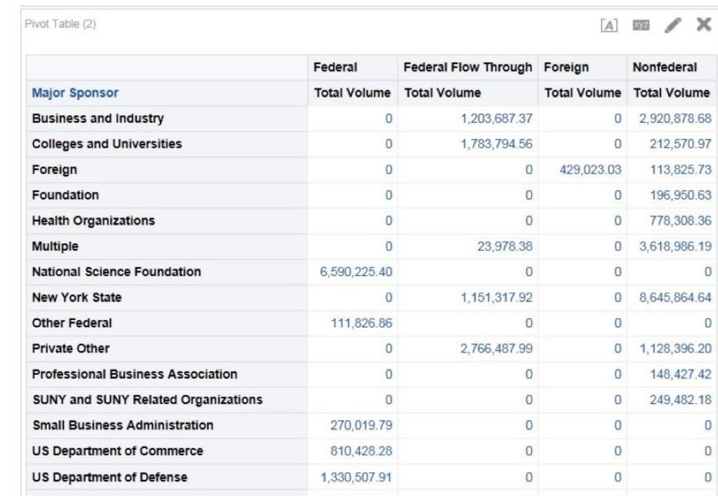
LESSON 5:
SHOWING RESULTS WITH PIVOT TABLES

OBJECTIVES

After completing this lesson, you should be able to:

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

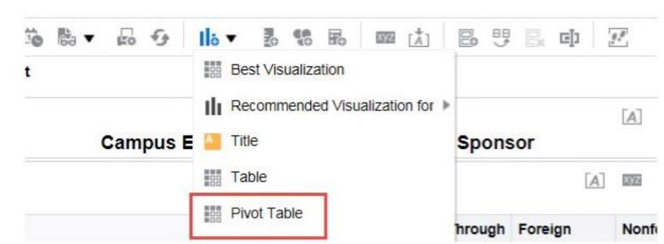
DISPLAYING DATA IN PIVOT TABLE


Pivot Table (2)

	Federal	Federal Flow Through	Foreign	Nonfederal
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
New York State	0	1,151,317.92	0	8,645,864.64
Other Federal	111,826.86	0	0	0
Private Other	0	2,766,487.99	0	1,128,396.20
Professional Business Association	0	0	0	148,427.42
SUNY and SUNY Related Organizations	0	0	0	249,482.18
Small Business Administration	270,019.79	0	0	0
US Department of Commerce	810,428.28	0	0	0
US Department of Defense	1,330,507.91	0	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.

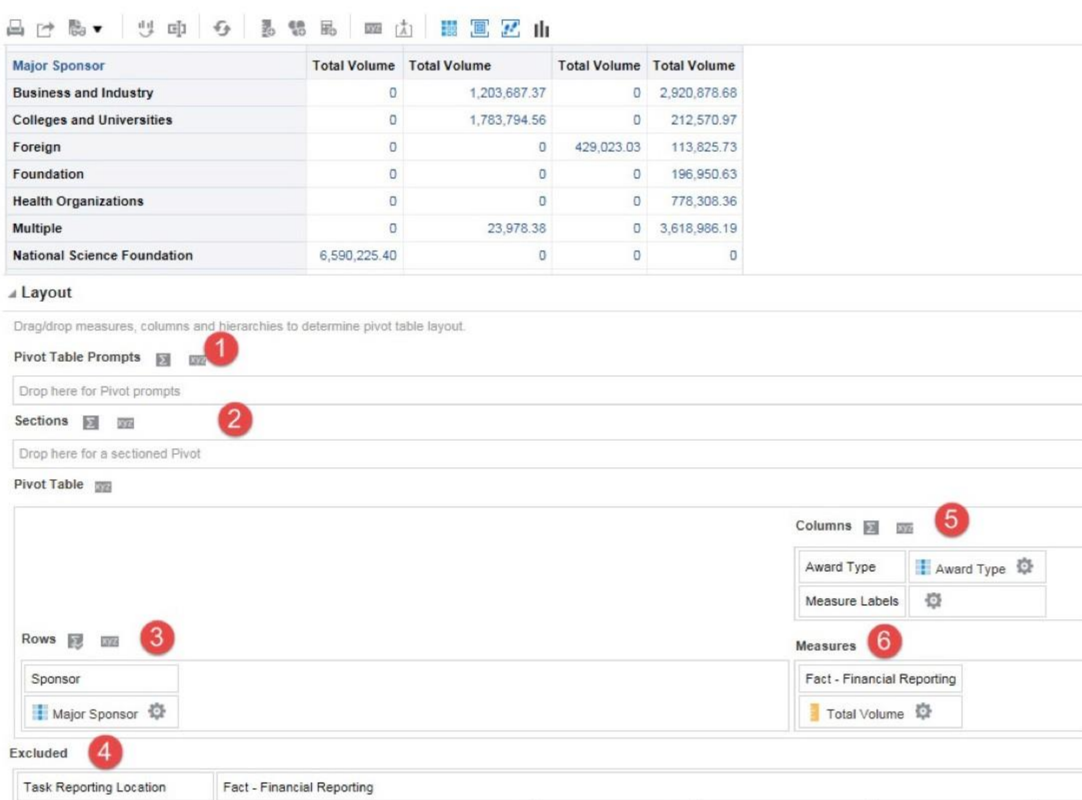
To create a **Pivot Table** you will need to select columns on the **Criteria** tab. Click the **Results** tab and select the **Pivot Table** View.



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



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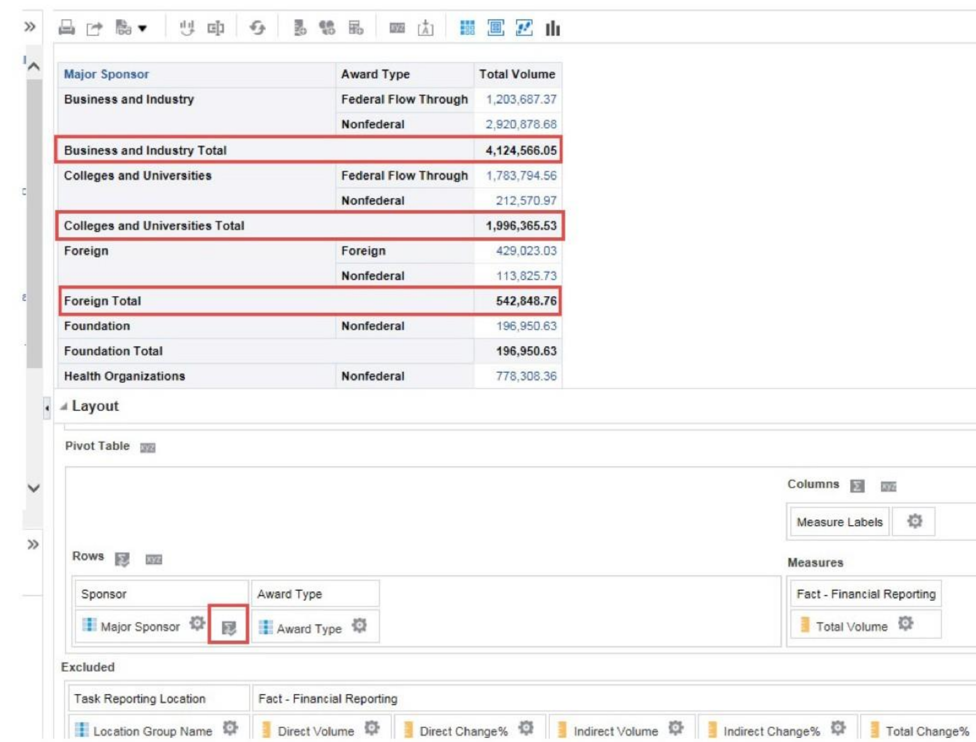
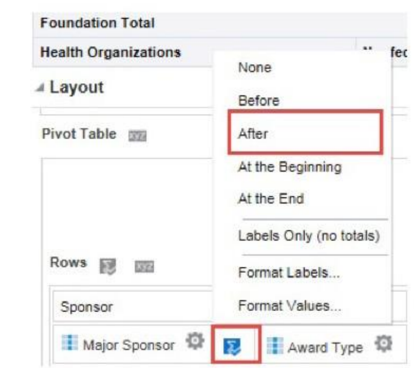
USING TOTALS

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.





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

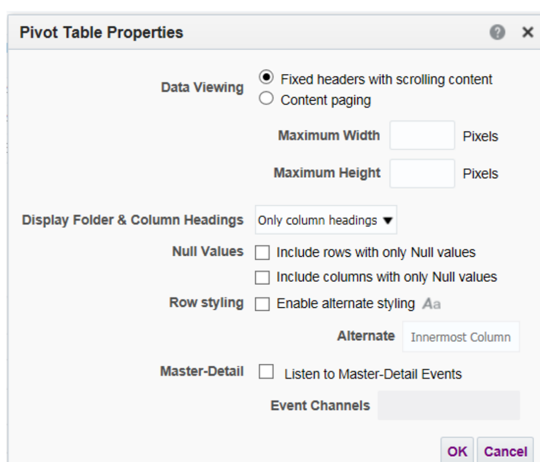
20 – 25 minutes

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

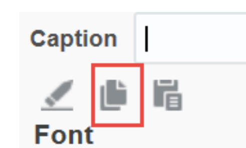
1. Sign into Report Center (if already not signed in)
2. Locate analysis you previously worked on “FYE Expenditures” and click on the Results tab.
3. On the toolbar, click the **New View** button and select **Pivot Table**.
4. A pivot table view is added to the bottom of the Compound Layout. It has also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



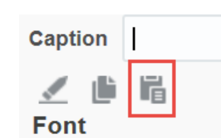
8. In the **Editor**, drag all columns so that they are as follows:
   a. Expenditure Category should be under Rows.
   b. Total Expenditures should be under Measures.
   c. Direct and Indirect Expenditures and Task Location Code should all be under Excluded.

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.
6. Click on the **Edit View** button to add totals after each **Task Organization Name**.
7. Click on the SUM button and choose **After**.
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.



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.

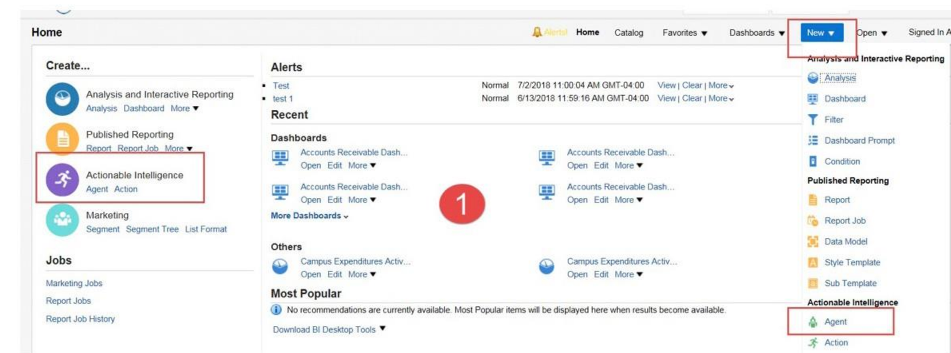
LESSON 6:
CREATING AGENTS TO SCHEDULE REPORTS

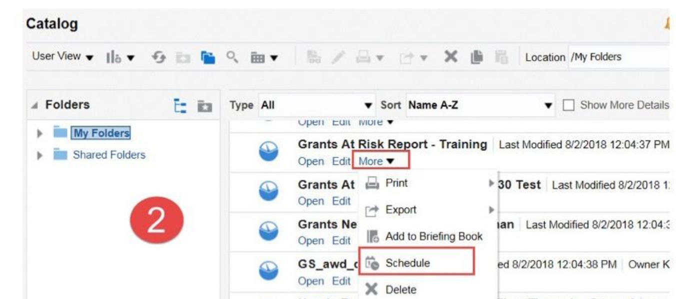
OBJECTIVES

After completing this lesson, you should be able to:

- Create Agents to schedule reports to be sent automatically

HOW AGENTS WORK



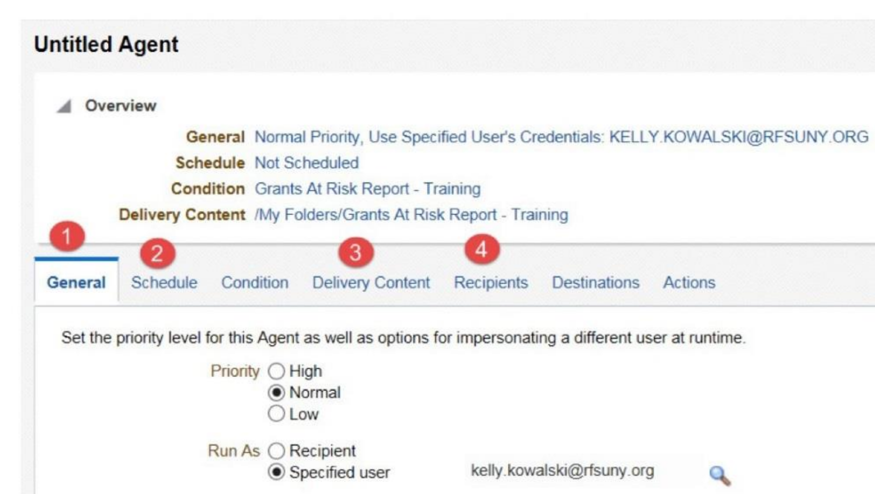


Agents allow you to schedule an analysis based on a defined schedule to end users.

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.

SCHEDULING AGENTS

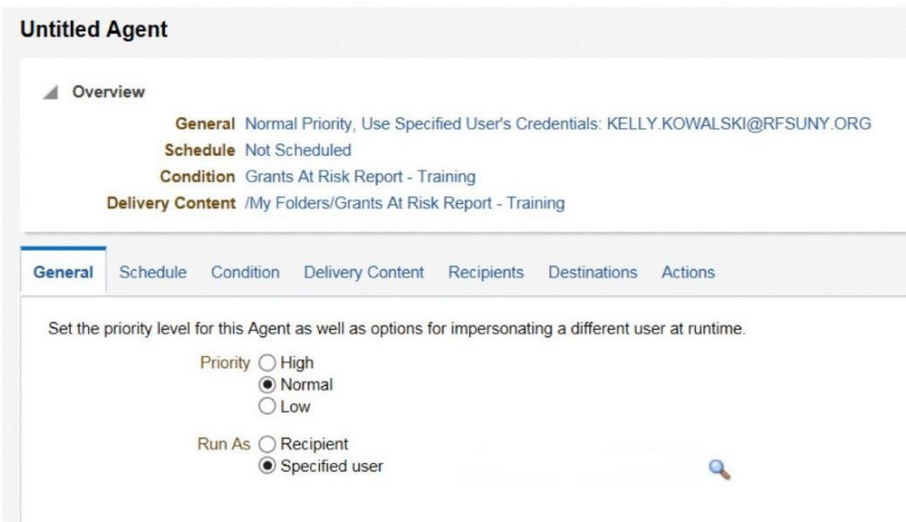


To create an **Agent**, you will have to set up the following tabs.

1. General Tab
2. Schedule Tab
3. Delivery Content Tab
4. Recipients Tab

The Condition, Destination and Actions tabs are for advanced scheduling.

CONFIGURE THE GENERAL TAB

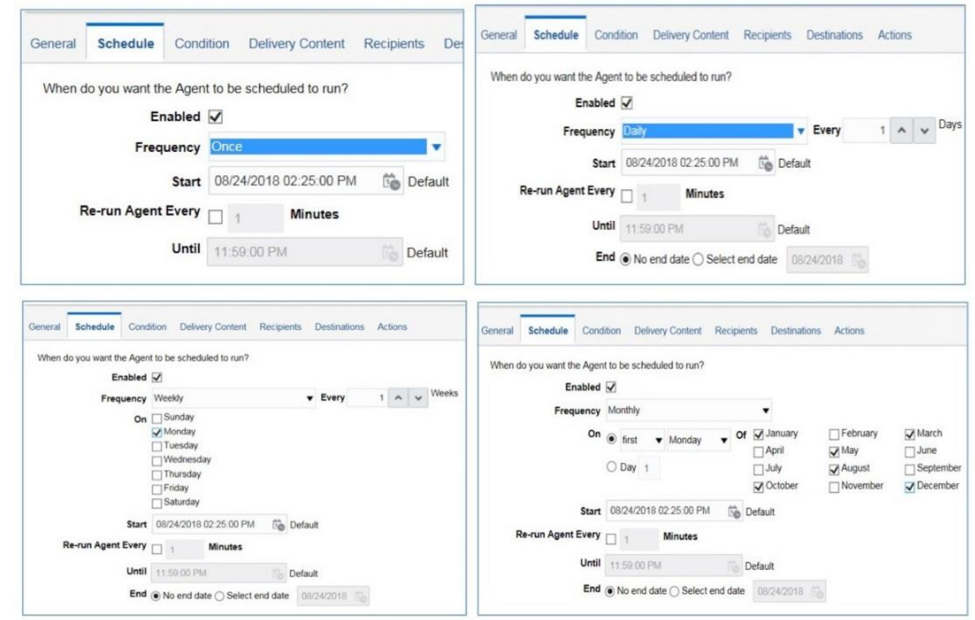


General Tab

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



Schedule Tab

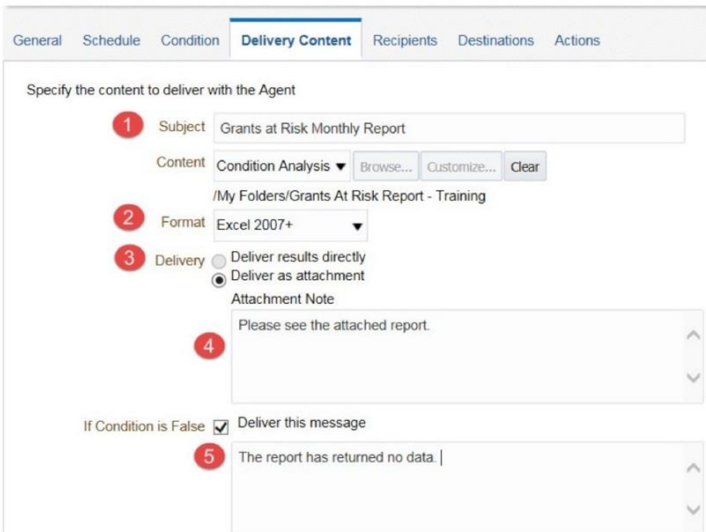
The **Schedule** tab specifies when an agent runs, how often it runs, and when it should be discontinued. There are three parts to an Agent schedule:

- 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

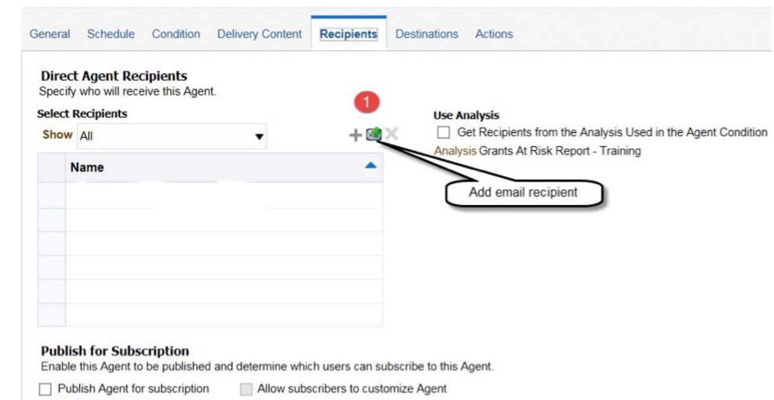


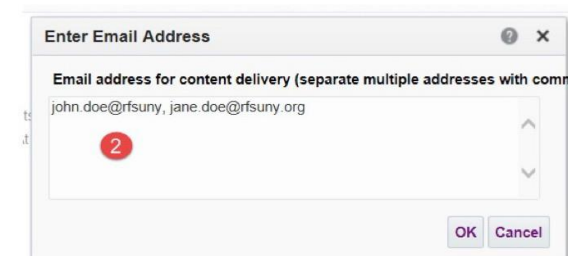
Delivery Content Tab

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





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

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

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

Recipients Tab
a. Click the **Recipients** tab to identify the recipients of the agent.
b. Click on the Email icon to add recipients.
c. Enter **YOUR** email address for content delivery. (Separate multiple email addresses with commas)
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.
3. When the agent has run successfully, you should receive a confirmation.
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.