

# UACCESS ANALYTICS

Working with Dashboards:  
Shared Reports at a Glance



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<b>Record of Changes</b>		
<b>Date</b>	<b>Version #</b>	<b>Description</b>
02/01/2012	1.00	Original
04/24/2012	2.00	Removed references to Analytics Upgrade; changed 500 to 100,000
06/14/2012	2.10	Added information regarding Exporting data and using the Analyze link
07/16/2013	3.00	Combined v2.10 with the UAccess Analytics: New Features and Functions booklet from 02/18/2013, incorporating all of the new features from the current version of the Analytics software. Rewritten to avoid reference to previous versions of the software.
08/14/2015	4.00	Reworked the document to correspond to the latest version of UAccess Analytics. Several tools and functions have been added, removed, renamed, and reworked in the three years since the booklet was last updated.
05/24/2017	5.00	Updated the entire document to correspond to the latest version of UAccess Analytics. Several tools and functions have been added, removed, renamed, or reworked in the two years since the booklet was last updated.
08/01/2019	5.10	Added the cover graphic and updated the branding to UAIR.
11/19/2019	6.00	Made minor changes to some of the text throughout the booklet. Updated the image of the home page on page 1. Updated the image of the analysis on page 6.

# Table of Contents

<i>About this Training Guide</i> .....	iv
<i>Access to Analytics Data</i> .....	iv
<i>UAccess Community</i> .....	iv
<i>Analytics Office Hours</i> .....	iv
<b>The Home Page and Global Header</b> .....	<b>1</b>
The Home Page .....	1
The Global Header .....	2
<b>Working with Dashboards</b> .....	<b>3</b>
Dashboard Sets and Pages .....	3
Overview Pages .....	3
Other Pages – Dashboard Prompts .....	4
Hover Help .....	4
<b>Working with Analyses</b> .....	<b>5</b>
View Selectors .....	5
Filters Views .....	5
Analyses .....	6
Analyses – Built-in Functions .....	6
<b>The Right-Click Menu</b> .....	<b>7</b>
Right-Click Menu – Sorting Columns .....	7
Right-Click Menu – Keep Only / Remove .....	8
Right-Click Menu – Subtotals and Grand Totals .....	8
Right-Click Menu – Exclude/Include Columns .....	8
Right-Click Menu – Moving Columns .....	8
<b>Dashboard Customization</b> .....	<b>10</b>
<b>Analysis Links</b> .....	<b>11</b>
Analysis Links – Analyze .....	11
Analysis Links – Refresh .....	11
Analysis Links – Print .....	11
Analysis Links – Export .....	12

## *About this Training Guide*

This UAccess Analytics brown bag demonstration is designed to help you become familiar with some of the features that are available to you in UAccess Analytics.

This demonstration is not designed to help you build dashboards or analyses. Nor is the session designed to help you interpret the data you will find on any dashboard.

This demonstration is generic by necessity and will provide you with the information you need to view, filter, manipulate, and otherwise work with various data that you use on a regular basis and that may be available on your own personal dashboard or on a shared dashboard.

For information on workshops in which you can learn how to build analyses and dashboards, as well as other brown bag demonstrations, please go to the Workshops and Training Team website at <http://workshops.arizona.edu>.

## *Access to Analytics Data*

Request for Individual access to UAccess Analytics can be submitted to <https://request.uaccess.arizona.edu>

## *UAccess Community*

The UAccess Community is an online networking resource available to everyone on campus who use UAccess Systems.

If you have an official UA email address, you can establish membership in the UAccess Community. Just go to <http://community.uaccess.arizona.edu> and click the Join the conversation link on the left side of the screen.

Once you've established your membership, you'll have access to valuable information about all of the various aspects of UAccess Systems. You'll want to join one or more of the Forums within the Community, because that's where the value comes in.

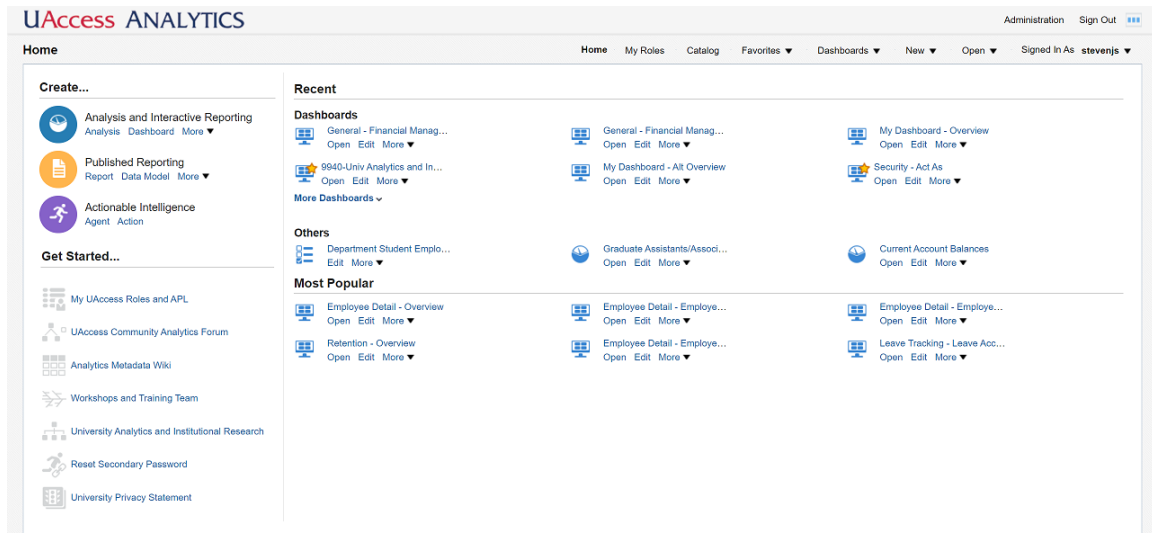
Please take advantage of the opportunity and become a member of the UAccess Community.

## *Analytics Office Hours*

Schedule some time with an instructor for help with analysis and dashboard creation or other questions. Register for Analytics Office Hours sessions through UAccess Learning. From the Find Learning screen, click the One-on-One link in the left menu bar.

## The Home Page and Global Header

The Home page and the Global Header are what most people see as they log in to UAccess Analytics. These two items are simply navigation tools you can use to get to some other place in Analytics.



## The Home Page

As you log in to UAccess Analytics, the first thing you will typically see filling the screen is the **Home** page.

On this page, you will find five or six main areas or sections.

- **Create:** The top section on the left provides links to help you get started in creating new analyses, filters, prompts, agents, etc.
- **Get Started:** This bottom section on the left provides links to information about your UAccess Roles, the Analytics Forum on the UAccess Community, the University Analytics and Institutional Research (UAIR) website, and other items of general interest to Analytics users.
- **Alerts:** This section appears on the top-right side of the Home page *only* when an Agent has been triggered to alert you about a specific event
- **Recent:** this main section on the right displays links to the most recent dashboards, analyses, and other items with which you have been working
- **Most Popular:** displays links to the dashboards and analyses that are most popular with users who share your access level

## The Global Header

The **Global Header**—the gray bars across the top of all screens—is your permanent access point to every area of Analytics.

If you have navigated away from the Home page, you can use the Global Header to get to all of the places and perform all of the functions that are available on the Home page. You don't have to navigate to any specific place in the software to start creating a new analysis or to get access to your already-created content.

You simply click the appropriate link on the Global Header, and off you go.

- **Alerts:** This link *may* be available if you have created an agent and it has been triggered to send you an analysis
- **Home:** Return to the Home page
- **My Roles:** This link corresponds to the My UAccess Roles and APL link in the **Get Started** area of the Home page
- **Catalog:** Access all saved content using Analytics' file management tool
- **Favorites:** Create your own list of favorite dashboards or other items
- **Dashboards:** Access all personal and shared dashboards
- **New:** Links through which you can begin creating analyses, filters, prompts, etc. Corresponds to the Create section on the Home page.
- **Open:** Another avenue to existing analyses and other items. This menu item also has a Recent section, through which you can access a few of the items you've recently opened.
- **Signed In As:** click your NetID and the **My Account** link to see your Preferences and other options

## Working with Dashboards

Most people who interact with UAccess Analytics do so through dashboards and the analyses that are displayed on those dashboards. This booklet is designed to help you become familiar with what you're seeing, in general, and will take you through some of the things you need to know to work efficiently and effectively with the data you'll find in Analytics.

### Dashboard Sets and Pages

The **Dashboards** menu gives you access to all of the dashboards to which you have been granted access. You will only see those dashboards for which you have been provisioned.

You might, for example, click the **Dashboards** menu to expand the list, and see a heading named **Financial**. You can expand that heading to see an extensive list of 16 different Financial dashboard sets.

You can access any specific dashboard set – **General – Financial Management**, for example – by clicking the name of the set. Each of those dashboard sets then contains multiple pages or tabs, each of which contains at least one analysis.

When there are more pages on the dashboard than will fit horizontally across the screen, the last visible tab will have a small, blue double arrow (>>) on it. Click that double arrow to expand a drop-down menu listing the remaining available pages. Click to navigate to the desired page.

Individual dashboard pages may also contain subpages that appear as tabs below the page tab.

### Overview Pages

Each dashboard set starts with an **Overview** page. The Overview page is a landing place that provides some valuable information.

Besides the title at the top of the page, you should find information about what is contained on the remaining pages in the dashboard set. You can review that information without clicking through all of the actual pages or subpages.

You'll also find a **Links and Documents** section on the right that includes links to other websites, a link to provide feedback about the dashboard, and links to other useful documents or sites.

There may be other useful information on the Overview page. Be sure to glance over the contents of the page before moving on to other pages.

## Other Pages – Dashboard Prompts

A **Dashboard Prompt** is a dynamic filtering tool available on most dashboard pages. Most dashboard prompts affect all of the analyses on a particular dashboard page. Sometimes, in particular situations, a dashboard prompt on one page of a dashboard set will affect all of the pages in that set, by design.

A dashboard prompt gives each individual user of that dashboard the ability to filter the analyses on the dashboard to suit their own needs.

Most of the dashboard prompts have one or more fields already filled in with a default value. Sometimes that default value is a universal value which pertains to everyone who views the page. In other situations, the default values pertain specifically to the person viewing the page.

Financial dashboards, for example, typically have the fiscal year and a fiscal period value already entered in the prompt fields. Other default values may also be entered for you.

You might also find your department number populating the Dept Code prompt field on a Financial dashboard, or your EmplID already in place on an Employee dashboard.

You can replace those values as you work with the dashboard. We pre-populate specific fields with those values to make things easier for you as you navigate through the various dashboards.

## Hover Help

If you hover your mouse over a dashboard name on the Dashboards menu, or over a dashboard tab, or over the name of an analysis on a dashboard, you may see a block of text pop up. That block of text – that hover text – will provide some information about the dashboard set, the page, or the report you're viewing.



## Working with Analyses

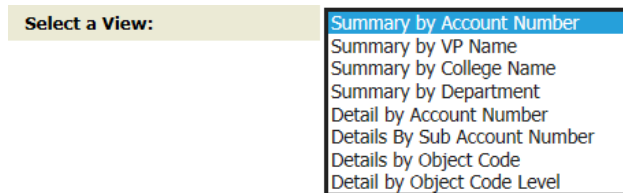
An **analysis** is a collection of data put together into report form. It may consist of a table of data, a chart or graph, or other representation of data.

An analysis has two “sides”: the query and the results. The query is the underlying command issued to the database to retrieve specific information. The results are the output returned from the database and are what you see on the dashboard.

Each dashboard page typically contains at least one analysis. Individual analyses might also have some functional features you’ll want to know about and work with.

## View Selectors

There are quite a number of dashboards whose reports include **View Selectors** at the top of the report. A View Selector is the tool by which a user can access different variations of the report. Very often, the choices include a variety of summary and detail views.

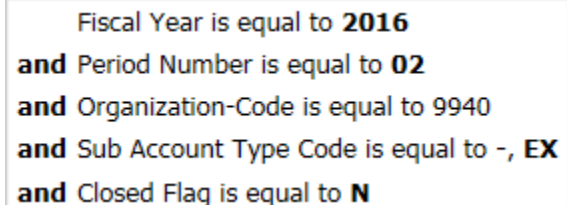


Simply click on the drop-down arrow on the right end of the View Selector box and make your selection. The report will refresh, and display the specific view you requested.

You can view any version you wish, selecting different views as your needs change.

## Filters Views

At the bottom of most reports you will find what’s referred to as a Filters view. This view is simply a snapshot of the filter as it was applied to the analysis you’re viewing. We’ve included the Filters view so you can verify that what you’re seeing is, in fact, the data that pertains to your department, your accounts, your employees, et cetera.



## Analyses

The reason you're looking at the dashboard is to see the analyses – the reports – you need to complete your work.

Most analyses – there are always exceptions – have a lot of built-in functionality that can help you get exactly the data you're looking for. It may not be necessary to export the data to another piece of software, or to make your own copy of the analysis. You may be able to make most of your modifications right here on the dashboard.

Fiscal Year	Period Number	College Name	Organization Code	Budget Record Level Name	Account Number	Account Name	Supervisor Name	Expiration Date
2020	05	Univ Info Tech Services Div	9940	Cash Style Account	2245180	UAIR INST RSCH UNRESTR MISC	Calaya, Marisela M	N/A
				Cash Style Account Total				
				Budget Style Account	1182500	UNIV ANALYTICS & INSTITUTIONAL RESEARCH	Calaya, Marisela M	N/A
				Budget Style Account Total				
			9940 Total					
		Univ Info Tech Services Div Total						

Rows 1 - 25

## Analyses – Built-in Functions

In the image above, you can see that there are a number of different data columns, each of which has a column header. When this image was captured, the user was hovering the mouse pointer over the Period Number column header. That causes a tab to pop up, and also activates the sorting buttons.

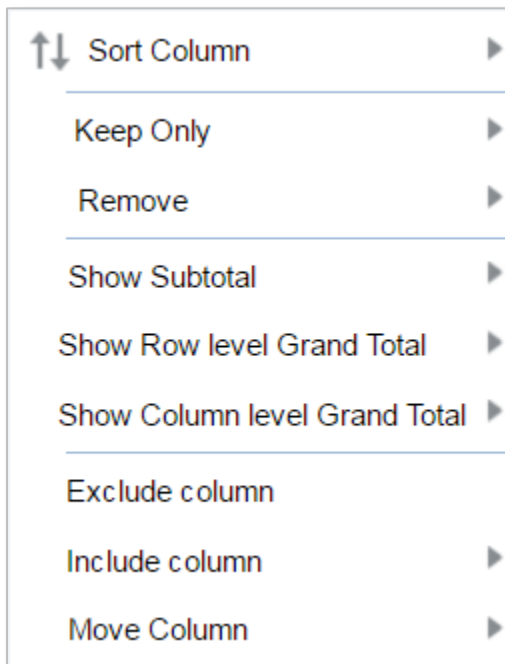
You can use those sorting buttons to sort ascending or descending. You can see, too, that the Account Number column shows those same buttons. The up button – sort ascending – is shown in blue. The entire report is sorted by that column, with the values sorted in ascending fashion.

You'll also see that some of the text or values in some columns are in blue. Some are in default black. The blue text is drillable text. Clicking on drillable text will filter the report to the value you clicked on, and will also add another data column to the analysis.

In the same image, you can see that subtotals and grand totals have been turned on for the report. You can actually turn them off temporarily right here on the dashboard, if you wish.

The paging buttons that you can see at the bottom of the analysis let the user access the remaining data rows in the analysis. You're typically viewing the first 25 rows of data, and clicking the down arrow would show you the next 25, etc. Clicking the double-headed arrow will expand the analysis to show you all rows at one time.

## The Right-Click Menu



Rather than simply hovering the mouse pointer over a column header, you could **right-click** on that column header. When you do, you'll typically see the menu to the left. The menu you see might differ depending on the type of data in the column, but the menu shown here is fairly standard.

As you can see, the menu gives users functional tools they can use to alter the report and the data.

Using the right-click menu, you can:

- Sort the analysis
  - Keep Only or Remove specific values
  - Show Subtotals or different Grand Totals
  - Exclude or Include data columns
- Move a column

## Right-Click Menu – Sorting Columns

Use this menu option to **sort** by one or more data column in this analysis. You can sort by one or more data columns, as you need. To sort by multiple data columns, start with the first column by which you wish to sort and select **Sort Column > Add \_\_\_\_\_ Sort**. Move to the next column and select **Sort Column > Add \_\_\_\_\_ Sort**. Continue as needed.

## Right-Click Menu – Keep Only / Remove

This relatively advanced set of functions is explained in the **Working with Dashboards: Selections Steps** document available from the **UAccess Community** at **Resources > Analytics**.

A Selection Step is a method by which the dashboard user can apply a type of filter after the report has been run and filtered.

Please feel free to download the Selection Steps document when you need it.

## Right-Click Menu – Subtotals and Grand Totals

The analyses you will use on various dashboards in Analytics may or may not have default subtotal and grand total values. Whether you wish to add or remove subtotals and totals, this menu will be handy

## Right-Click Menu – Exclude/Include Columns

Excluding an unwanted data column from a dashboard analysis removes that data column from the table or pivot table. You lose the data, of course, along with any effect that data column might have had on the rest of the data.

Many analyses are created with extra data columns already excluded from them. Any data column that has been excluded can then also be included again, as the user needs.

Including a data column will put that data column into the table or pivot table, at which point it can be moved around and placed where it is needed.

## Right-Click Menu – Moving Columns

You also have the ability to move any or all of the columns in any analysis, allowing you to more fully customize the analysis to see only that data you wish to see, in the manner in which you wish to see it. There are two methods by which you can move columns: you can either drag the column or use the right-click menu.

Not only can you move columns to the left or right within the table or pivot table. You can also move columns up into two different areas that are placed above the

table or pivot table. Those areas are the Sections area immediately above the table, and the Prompts area above that.

Using the Sections area will break your report into one section for every value that exists in the column you moved to the area. For example, if you move the Academic Level Beginning of Term data column to the sections area, your report would be separated into four sections – Freshman, Sophomore, Junior, and Senior. Assuming the report was filtered to Undergrads.

Using the Prompts area will create a drop-down box that will contain all of the values in the data column. If you move the column above into the Prompts area, the drop-down menu will contain the four values. You can then select whichever value you wish, and the report will display data for just Freshman, as an example.

## Dashboard Customization

Now that you've made your selections in the dashboard prompt, sorted as you need, excluded unwanted columns, and moved some columns around, you might wish to save those settings so that you don't have to go through all of those steps the next time you come to this dashboard.

To save your customizations you've made so that they're available to you in the future, click the **Page Options** button and select **Save Current Customization** from the menu. Name the customization as you wish, then click OK.

You have the option of setting a particular customization as the default view for a dashboard page. Saving your customization as the default view may mean you're unaware of later modifications that were made to the standard analyses on that page.

Once you have your various settings established, you may use them at any time on that particular dashboard page.

To use a customization, return to the dashboard page. Click the **Page Options** button, select **Apply Saved Customization**, then select your customization.

If you've made a number of changes to a dashboard, but wish to clear those changes and reset the page to the default settings, you can. Click the **Page Options** button and select **Clear My Customization** from the menu. This will not delete a saved customization.

## Analysis Links

Most analyses on most dashboard pages have four links available at the bottom of the report. When those links are available, they allow the user to do a number of things with that analysis.

### Analysis Links – Analyze

The **Analyze** link gives you an opportunity to make your own copy of the report. Simply click the Analyze link and a copy of the report, complete with prompted filters and all other features, will open in edit mode.

At that point, you can make whatever changes you wish. The report is yours. Once you've made your modifications, click the **Save As** button in the upper-right corner of the screen. Then select the **My Folders** folder in the Save As screen and save the report to your own folders. It isn't possible for the typical Analytics user to overwrite or harm the original dashboard analysis.

### Analysis Links – Refresh

Clicking the **Refresh** link will rerun the analysis, ensuring you're getting the latest data available. Using this link is rarely required, unless you believe your computer is showing you a cached version of a report. Clicking Refresh in that instance may help, but you may have to clear the cache on your browser.

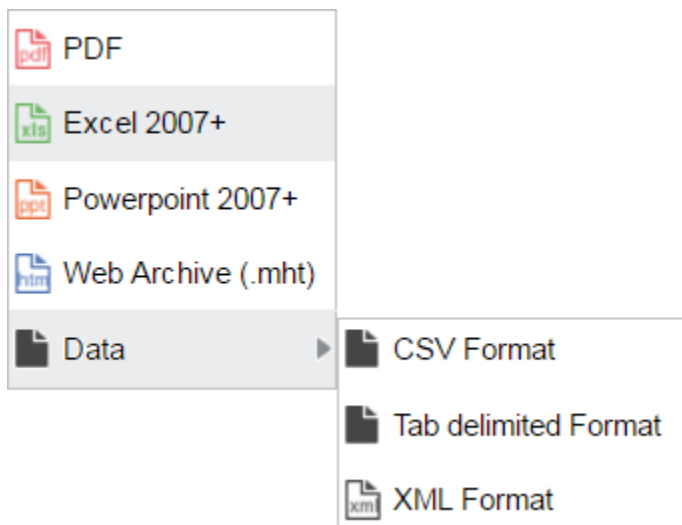
Please refer to the latest version of the **Computer Basics: Clearing Browser Cache** document available on the **UAccess Community > Resources > Analytics** web page.

### Analysis Links – Print

You will have two options available to you when you click the **Print** link. You can choose a Printable PDF document, or a Printable HTML document. Either version can also be saved, rather than printed. The typical selection is to print the PDF document.

## Analysis Links – Export

The **Export** link has the most options available to the user. Many Analytics users have a need to export a report for one reason or another. It's sometimes not clear which Export choice you should make; Excel or Data.



If you want to export the analysis and have it look very similar to the way it looks in Analytics – title, column headers, the filters view, etc. – then you should select the **Excel** option. Analytics will export the report into Excel, and the exported analysis will replicate the look of Analytics as much as possible.

If you would prefer getting just the raw data, then you should select one of the first two **Data**

options. The two options are very similar, but the **Tab delimited Format** option works best for most people. The **CSV Format** option – CSV means “comma-separated values” – is an older export model.

Regardless of which Data export option you select, the analysis is run again from the report's Criteria tab. All of the filtered data is exported from Analytics into Microsoft Excel, but no formatting is carried over. You get just the data, including any Excluded or Hidden data columns. You can then use Excel to manipulate the data in whatever fashion you wish.



