Statewide Management, Accounting and Reporting Tool

Statewide Human Resource and Payroll System

Participant Guide – RP301: Ad Hoc Business Intelligence Reporting

State of Kansas

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Course Overview

Course Objectives

Upon completion of the course, you will be able to:

- Explain the processes and roles in the data warehouse
- Create basic requests
- Add basic request options
- Format request results
- Create dashboards
- Work with advanced filters
- Manage views

Agenda

Today, we will cover the following topics:

- Data Warehouse Processes
- Data Warehouse Roles and Responsibilities
- Understanding Facts and Dimensions
- Viewing Saved Requests
- Creating and Saving Requests
- Changing Request Views
- Ordering Request Columns
- Adding Totals
- Working with Basic Filters
- Adding Formulas
- Downloading Request Results
- Formatting Column Content
- Editing Column Layout

Participant Notes:

- Editing Column Appearance
- Creating and Modifying Dashboards
- Add Pages to a Dashboard
- Working with Column Filters
- Using Saved Requests as Filters
- Completing Common View Tasks
- Titles and Legends
- Using Text
- No Results View
- Using Selectors
- Chart Views

Participant Notes:

Lesson 1: Reviewing the Data Warehouse

Objectives

Upon completion of this lesson, you will be able to:

- Describe how the data warehouse integrates with the SHARP and SMART systems
- Explain the roles in the data warehouse and the task performed by each role

Key Terms

- **Panes** – The data warehouse pages display a left and a right pane. The left pane is the selection pane, used to navigate to, select, and manage saved information. The right pane is used to display and work with the content selected in the left pane.
- **Selection Pane** – Contains the Catalog and Dashboard tabs that you use to select items to work with
- **Presentation Catalog –** Holds the content created with Answers and Dashboards. Content is organized into folders that are either shared or personal.
- **Tabs** – Provide access to other pages related to the current page. The tabs appear in the top part of the page. The list of available tabs depends on which page you select.
- **Subject Areas** – Contains columns that represent the categories of data that are available in SMART or SHARP. Subject areas have names that correspond to the types of information they contain.

  Note: For the State of Kansas, the subject areas correspond to PeopleSoft Marts, which are organized by module, such as Accounts Receivable

Participant Notes:

- **Workspace** – Contains a list of the actions you can perform and the subject areas that are available to you

Topic 1: Data Warehouse Processes

- The data warehouse enables the State of Kansas to store data extracted from SMART and SHARP. The data is transformed into a common format, integrated, and summarized to enable fast data retrieval for reporting.
- Extract, transform, and load (ETL) jobs extract information contained in SMART and SHARP and load it into the data warehouse

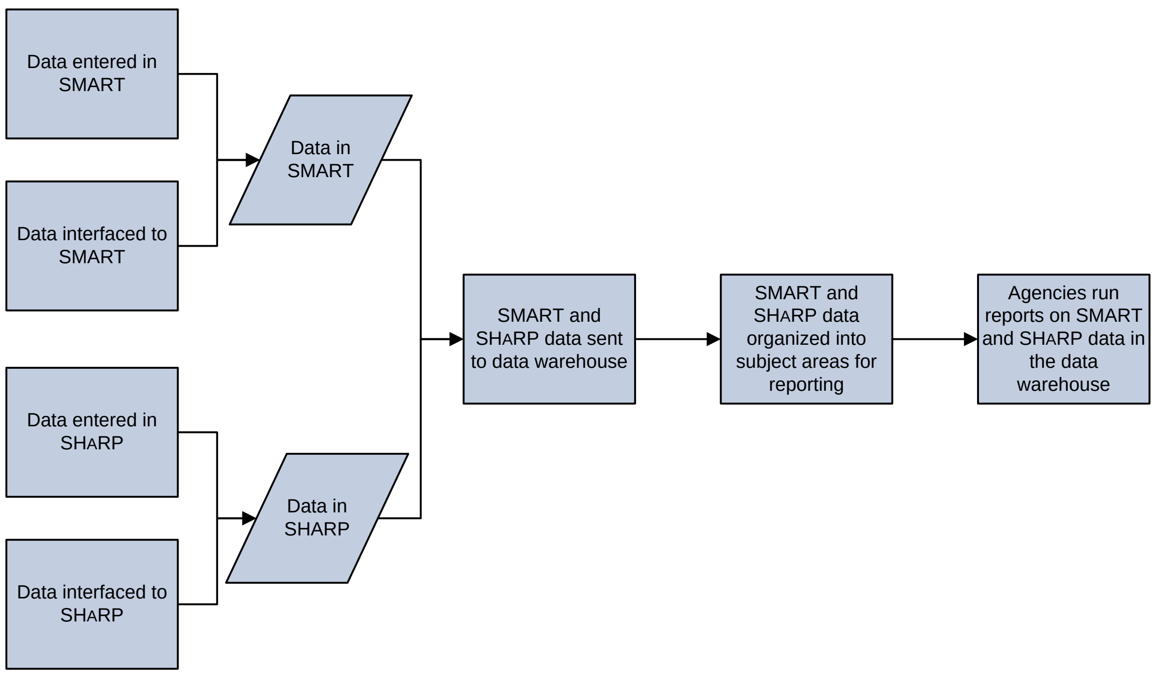

Figure 1. SMART and SHARP to Data Warehouse Process Flow

Participant Notes:

Topic 2: Data Warehouse Roles and Responsibilities

Role	Description
Finance User	This role will be responsible for viewing reports containing Finance data. This role will also personalize the data warehouse dashboard(s).
HR User	This role will be responsible for viewing reports and dashboards containing HR data. This role will also personalize their own data warehouse dashboard(s)
Finance Power User	This role will be responsible for viewing reports and dashboards containing Finance data. This role will also personalize their own data warehouse dashboard(s), create queries, reports, and dashboards containing Finance data, and grant folder access to Finance users.
HR Power User	This role will be responsible for viewing reports and dashboards containing HR data. This role will also personalize their own data warehouse dashboard(s), create queries, reports, and dashboards containing HR data, and grant folder access to HR users.

Table 1. Data Warehouse Roles and Responsibilities

Lesson Review

In this lesson, you learned to:

- Describe how the data warehouse integrates with the SHARP and SMART systems
- Explain the roles in the data warehouse and the task performed by each role

Participant Notes:

Lesson 2: Creating Basic Requests

Objectives

Upon completion of this lesson, you will be able to:

- Explain facts and dimensions
- View a request
- Create and save a new request

Topic 1: Understanding Facts and Dimensions

- **Facts** – Numeric transaction data, such as dollars spent on office supplies or the number of open purchase requisitions

  Note: In general, a request should contain at least one column from the Facts table in the Selection Pane. Running a request without including any facts generally produces reports that are not meaningful, can cause poor query performance, and/or unexpected results.

- **Dimension** – Provides the structured labeling information to otherwise unordered numeric measures as a means to "slice and dice" data in a data warehouse. For example, "Customer", "Date", and "Invoice Number" are all dimensions that could be applied meaningfully to a sales receipt.
  - The primary functions of dimensions are to provide filtering, grouping, and labeling. For example, in a data warehouse where each person is categorized as having a gender of male, female, or unknown, a user of could filter or categorize each report by filtering based on the gender dimension or displaying results broken out by gender.
  - Each dimension in a data warehouse may have one or more hierarchies applied to it. For the "Date" dimension, there are several possible

Participant Notes:

hierarchies: "Day > Month > Year"", Day > Week > Year"", Day > Month > Quarter > Year", etc.

Topic 2: Viewing Saved Requests

- **Folder** – An organizational construct that holds requests created in the data warehouse
- Your top-level personal folder is called **My Folder**. This folder is located at the top of the **Selection Pane** on the **Catalog** tab. The first time you see this folder, it will be empty. You can populate it by saving requests to it.
- **My Folder** is designed to hold the requests that you run most often, and other content that you access frequently. Selecting a request from a folder causes the request to be executed immediately

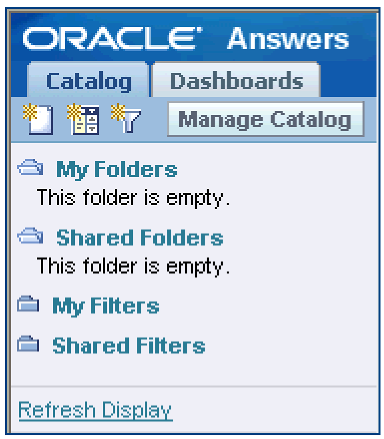

Figure 2. Folder Structure for Saved Requests

Walkthrough/Activity

You will now complete Activity 1: Viewing Saved Requests in your Activity Guide.

Participant Notes:

Topic 3: Creating and Saving Requests

- **Column** – Indicate the columns of data that your request will return. Together with filters, they determine what your results will contain. To run a request, you need to specify at least one column to return.
- **Criteria** – Consists of the columns and filters you specify for a request

  Note: If you click your browser's **Refresh** button before you are done creating a request, the browser will reload all frames and discard your changes

To create a new request:

1. Click a subject area from the Workspace

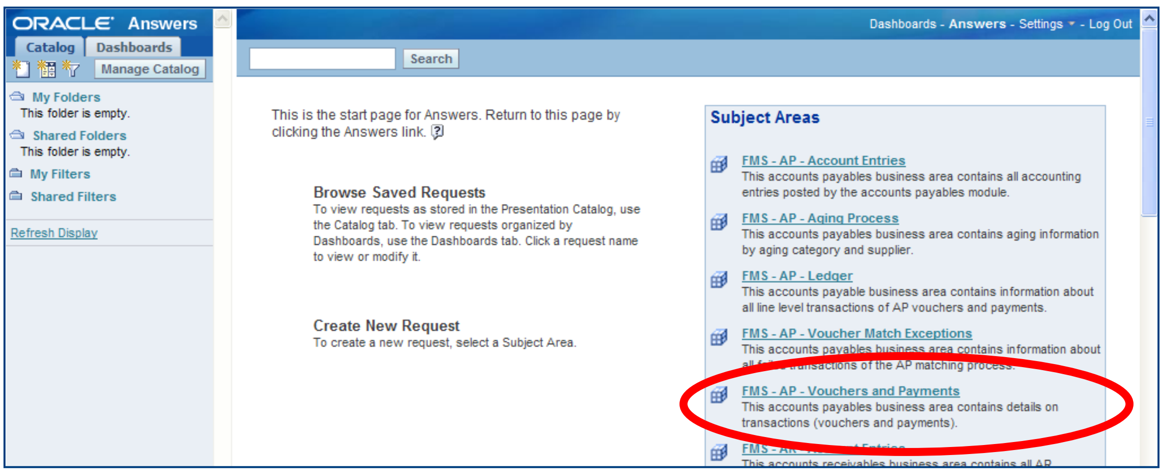

Figure 3. Selecting a Subject Area

Participant Notes:

a. The **Selection Pane** displays the columns that are available to add to the request
b. The **Workspace** displays the tabs for working with the request

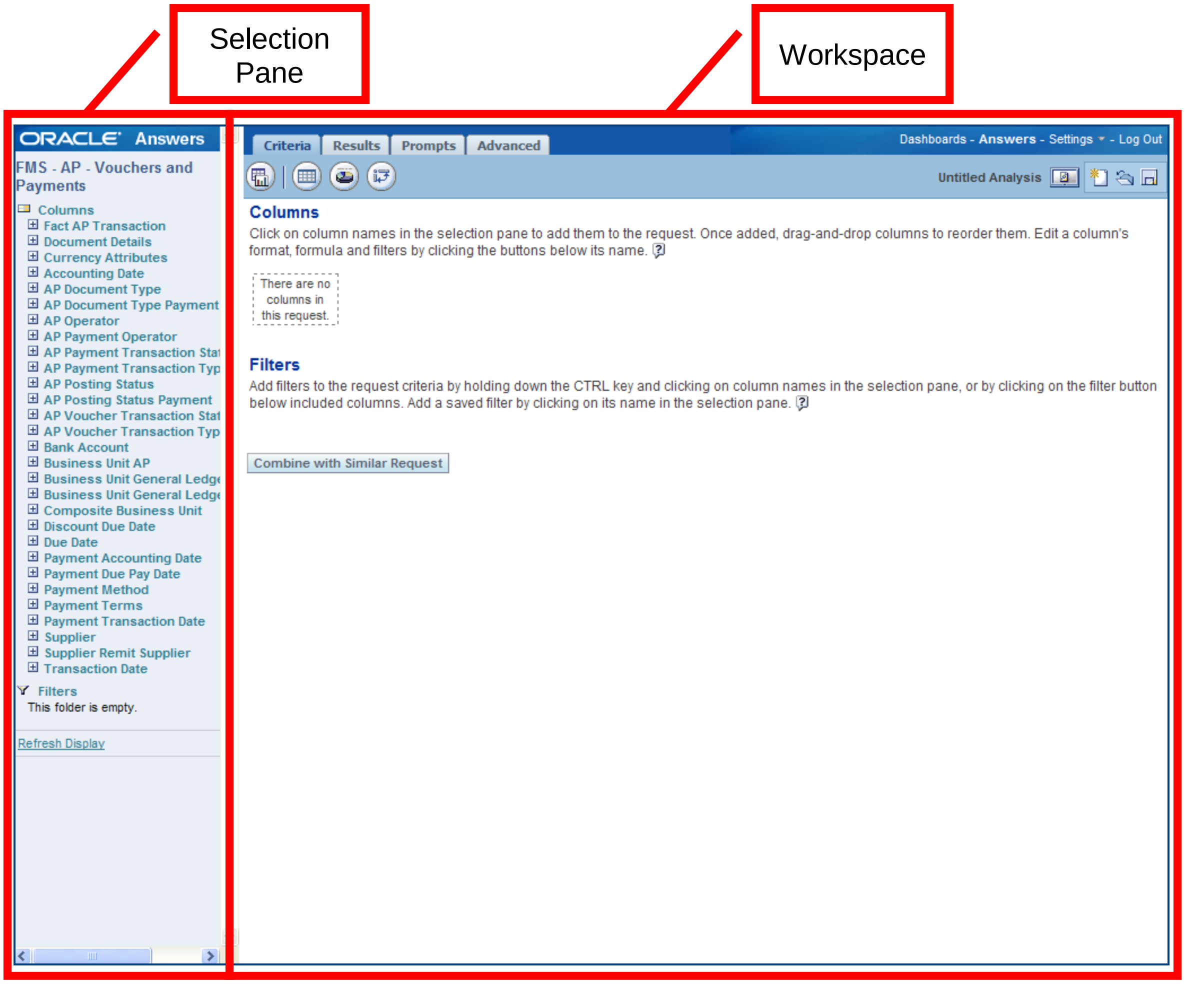

Figure 4. Selection Pane and Workspace for Creating Requests

Participant Notes:

Field	Description
Criteria Tab	Used to view or change the columns and filters for the request. You can specify the order in which the results should be returned, column subtotals, formatting (such as headings and number of decimal places), and column formulas (such as adding a Rank or Percentile function). You can also add or modify column filters.
Results Tab	Used to work with the results of a request, and create different views of the results such as charts, tickers, and pivot tables. You can add a variety of views, including charts and pivot tables that show the data, plain or formatted text that describes the results, HTML, and more. The default results view is a simple table with a title, but you can combine views and position them anywhere on the page.

Table 2. Workspace Tab Descriptions

2. Click the column(s) to add to your request
3. Reorder the columns in the Workspace by dragging a column from its current location and dropping it in a new location
4. Use the column buttons to manage how each column is used

Participant Notes:

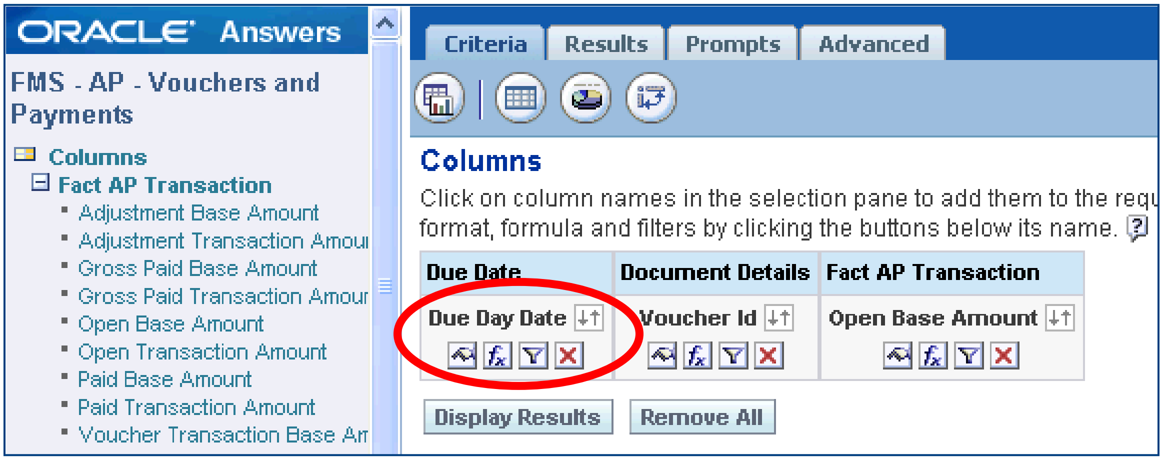

Figure 5. Column Buttons on the Criteria

Button	Description
Order By 	Specifies the order in which results should be returned. Different images appear on the button, depending on the selected sort order.
Format Column 	Lets you edit various format properties for the column. The button displays the image of a hand with its index finger pointing to the left and down.
Edit Formula 	Lets you change the column heading and the formula for the column, such as adding a Rank or Percentile function. You can also combine multiple values or ranges of values from a given. The button displays the image of lowercase, italic characters “fx”.
Filter By Column 	Lets you create or edit a filter for the column. The button displays the image of a funnel.

Participant Notes:

Button	Description
Remove Column 	Lets you remove the column from the request. The button displays the image of an uppercase "X". Also called **Delete**.

Table 3. Column Button Descriptions

5. Click the **Preview** button under the **Featured Links** to see how results will look on the dashboard (optional).

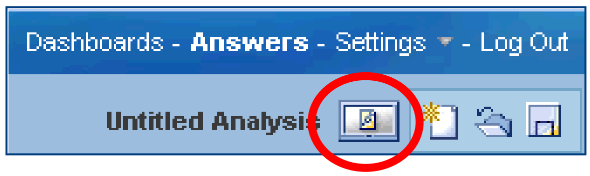

Figure 6. Preview Button

6. Click the **Display Results** button to view the results of your request. You can also click the **Results** tab and then choose a view from the drop-down list.

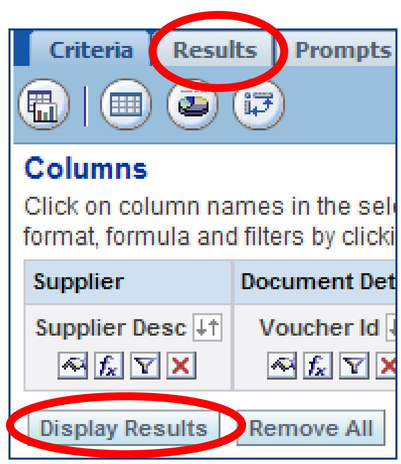

Figure 7. Display Results Button

Participant Notes:

7. Save the results of your request
   a. When you save a request within **My Folders**, only you can access it

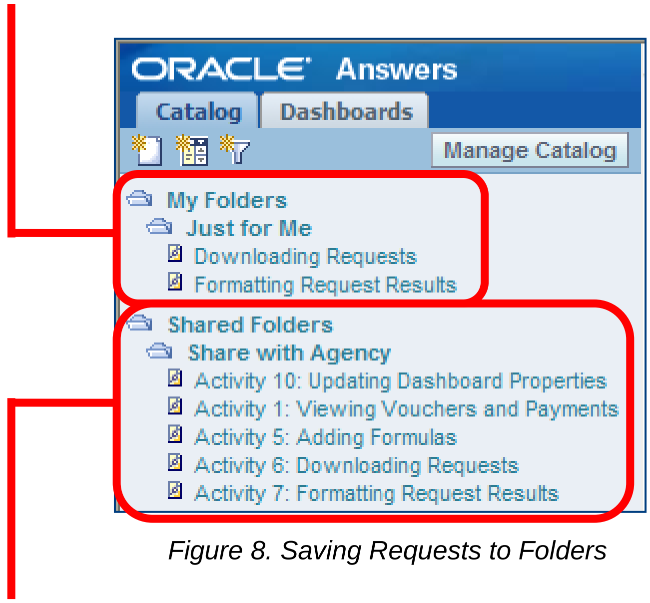

Figure 8. Saving Requests to Folders

   b. When you save it in a shared folder, you can give others permission to access the request too

Participant Notes:

8. When you click the **Refresh Display** link at the bottom of the selection pane, the request is listed under the folder in which you saved it.

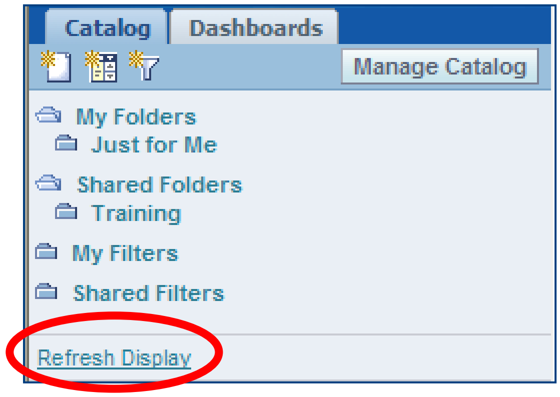

Figure 9. Refresh Display Button

Walkthrough/Activity

You will now complete Activity 2: Creating and Saving Requests in your Activity Guide.

Lesson Review

In this lesson, you learned how to:

- Explain facts and dimensions
- View a request
- Create and save a new request

Participant Notes:

Lesson 3: Adding Basic Request Options

Objectives

Upon completion of this lesson, you will be able to:

- Create common views to display request results
- Apply ordering to request results
- Add a subtotal to a request
- Add a formula to a request
- Add and save a single filter to a request
- Download request results

Topic 1: Changing Request Views

- Four common views are available from the **Criteria Tab** by clicking the appropriate view button
- Clicking one of the view buttons displays the results on the **Results Tab**

View	Description
Compound Layout View	Lets you combine individual views and arrange them for display on a dashboard
Table View	Lets you show results in a table
Chart View	Lets you show results in different kinds of charts
Pivot Table View	Lets you take row, column, and section headings and swap them around to obtain different perspective

Table 4. Common Views for Requests Descriptions

Participant Notes:

Topic 2: Ordering Request Columns

- The **Order By** button specifies the order in which results should be returned - ascending or descending. Depending on your selection, the look of the button will change
- You can order results by more than one column

Button	Description
	The image of two arrows—one pointing up, the other pointing down—indicates that the selected column will not be used to sort the results
	The image of an up arrow indicates that the results will be sorted in ascending order, using the items in the selected column
	The image of a down arrow indicates that the results will be sorted in descending order, using the items in the selected column.
, 	A number on an **Order By** button indicates that the column is not the primary sort column applied to the results. The number corresponds to when the sort order is applied.

Table 5. Order By Buttons Descriptions

Walkthrough/Activity

You will now complete Activity 3: Ordering Request Results and Using Request Views and in your Activity Guide.

Participant Notes:

Topic 3: Adding Totals

- Totals can only be added when in the **Table** or **Pivot Table** view
- Use the **Totals** button to add totals to individual columns or an entire table

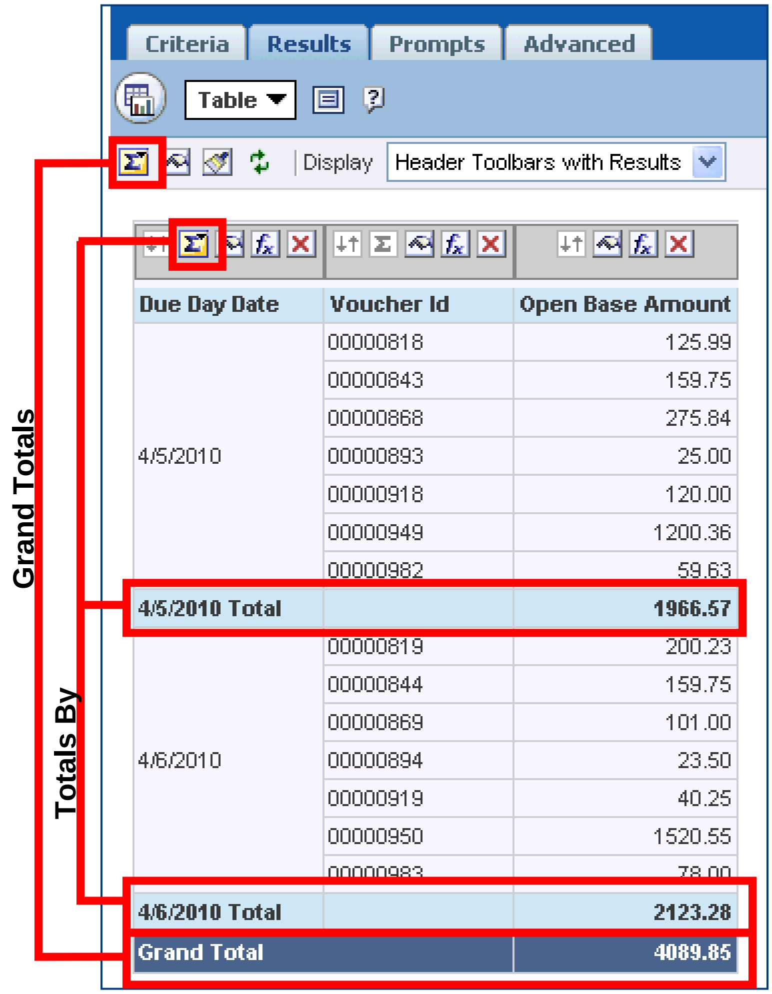

Figure 10. Grand Totals and Totals by Buttons

Participant Notes:

- When at the top of the workspace, this button is called the **Grand Totals** button. Use the Grand Totals button to add a grand total to a table or pivot table.
- When at the top of an individual column, this button is called the **Total By** button. Use the Total By button to add subtotals within an individual column in a table or pivot table.

  Note: The **Total By** button is available only for columns that can be totaled.

Topic 4: Working with Basic Filters

- A filter is used to limit the results that appear when a request is run
- When combined with the columns selected for a request, a filter determines what your results will contain. The data warehouse shows only those results that match the filter criteria
- The simplest filter is on a single column-level basis
- Click the **Filter** button for a column from the **Criteria** tab to open the **Create/Edit Filter** window

Participant Notes:

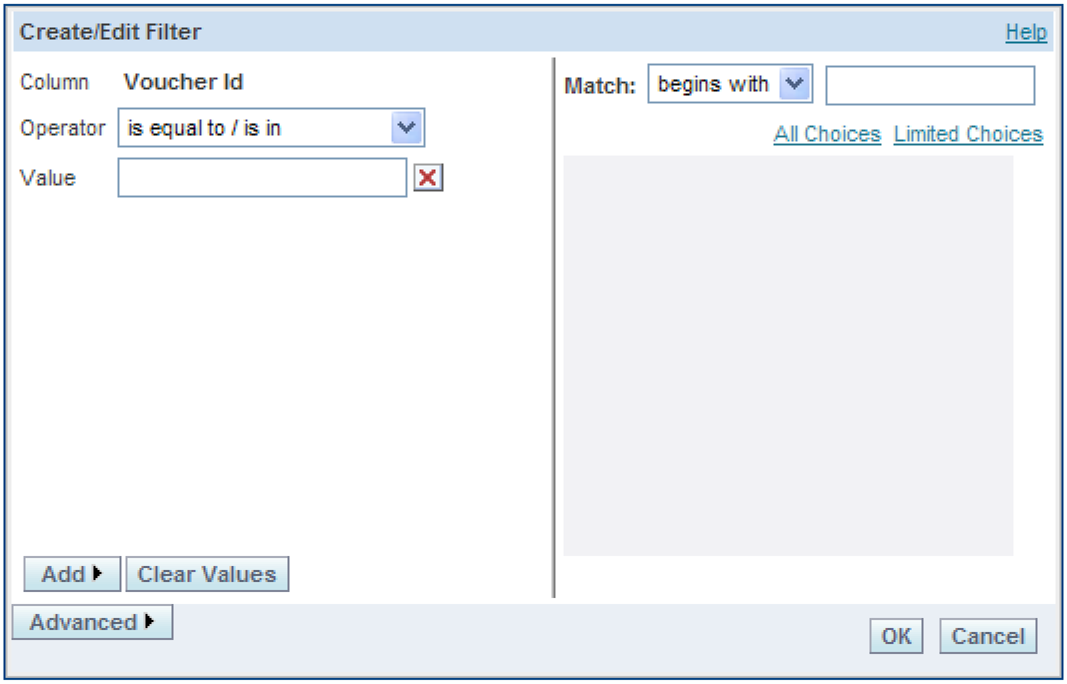

Figure 11. Create/Edit Filter Window

Field	Description
Column	Used to identify the column the filter will be applied to
Operator	Used to determine how the filter is applied
Value	Used to determine the values that will be included or excluded in your filter based on your operator selection
Match	Used to limit the list of values to appear in the All Choices or Limited Choices list for columns that contain text or numbers

Table 6. Create/Edit Filter Window Fields

Participant Notes:

Walkthrough/Activity

You will now complete Activity 4: Adding Filters and Totals in your Activity Guide.

Topic 5: Adding Formulas

- Use the **Edit Formula** button to change the column heading and add or change the formula for the column
- Clicking the Edit Formula button opens up the **Column Formula** window where you can add:
  - Operators and characters to the Column Formula area using the button bar
  - Functions to the Column Formula area using the button bar
  - Column expressions to the Column Formula area using the button bar
  - Variables to the Column Formula area using the button bar
  - Filters to the Column Formula area using the button bar
  - Case statements to the Column Formula area

Participant Notes:

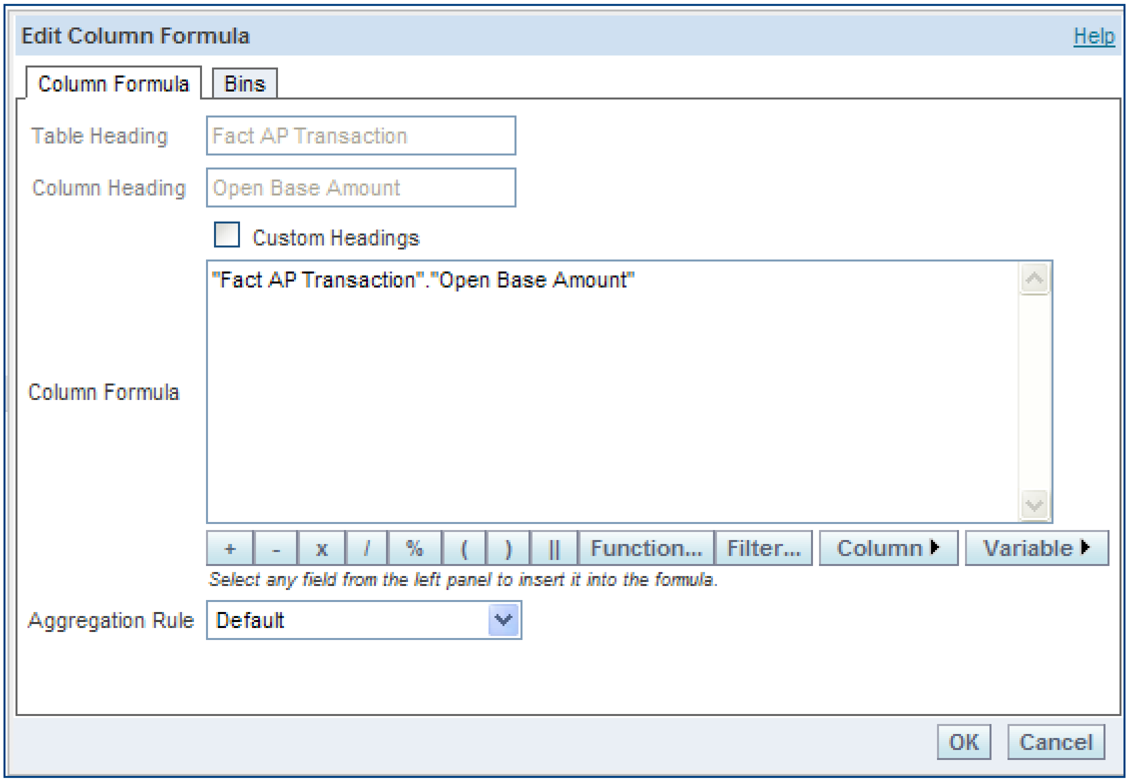

Figure 12. Edit Column Formula Window – Column Formula Tab

Field	Description
Table Heading	Used to change the Table Heading for the request from the default value
Column Heading	Used to change the Column Heading for the request from the default value
Custom Headings checkbox	Select to change the Table Heading and Column Heading fields

Participant Notes:

Field	Description
Column Formula	Used to enter a formula for the column. The formula can be entered manually or created using the option buttons below this field.
Operators and Characters buttons + - x / % ( ) ||	Click the buttons to add the desired operator or character into the formula. • **Plus** ('+' button) – Use for addition • **Minus** ('-' button) – Use for subtraction • **Multiply** ('x' button) – Use for multiplication • **Divide** ('/' button) – Use for division • **Percentage** ('%' button) – Use to convert to a percent • **Open parenthesis** ('(' button) – Use at the beginning of a group of operations to be processed together • **Close parenthesis** (')' button – Use at the beginning of a group of operations to be processed together • **Concatenate** ('||' button) – Use to link or connect values as in a series or chain
Function… button Function...	Used to insert a function into the formula. Click to open the **Insert Function** window. Functions are organized into the following categories: • **Aggregate** – Perform operations on multiple values to create summary results • **Running Aggregate** – Similar to functional aggregates in that they take a set of records as input, but instead of outputting the single aggregate for the entire set of records, they output the aggregate based on records

Participant Notes:

Field	Description
	encountered so far • **String** – Perform various manipulations on character strings. Character strings must be placed within single quotes. • **Math** – Perform mathematical operations • **Calendar Date/Time** – Manipulate data of the data types DATE and DATETIME based on a calendar year. You must select these functions together with another column; they cannot be selected alone. • **Conversion** – Convert a value from one form to another. You can also use the VALUEOF function in a filter to reference the value of an Oracle BI system variable. • **System** – There are two system functions, User and Database. They return values relating to the session. • **Operators** – Used to combine expression elements to make certain types of comparisons in an expression • **Expressions** – Building blocks for creating conditional expressions that convert a value from one form to another • **Literals –** Nonnull value that corresponds to a given data type. Literals are typically constant values and are taken as they are. A literal value must comply with the data type that it represents

Participant Notes:

Field	Description
	Note: Click the **Help** link in the Insert Function window to learn more about using each category and the specific functions within each of them.
Filter… button Filter...	Used to add a filter to the column. Click to open the **Insert Filter** window and add select a field from the left panel to add a column filter expression
Column drop-down Column	Used to add a column to the formula
Variable drop-down Variable	Used to add a **Session**, **Repository**, or **Presentation** variable to the formula
Aggregation Rule	Used to determine how the results are totaled or collected for the column
Help	Click the link to open detailed instructions for adding formulas to a column

Table 7. Edit Column Formula Window – Column Formula Tab Field Descriptions

Walkthrough/Activity

You will now complete Activity 5: Adding Formulas in your Activity Guide.

Topic 6: Downloading Request Results

- You can download the results of your request from the data warehouse
- Use the **Download** link from the **Compound Layout** view or when previewing how your request will look on a dashboard

Participant Notes:

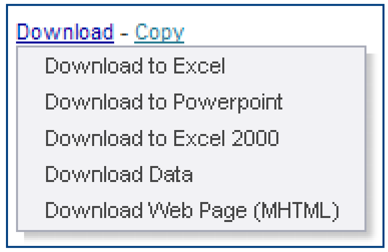

Figure 13. Download Link Options

Field	Description
Download to Excel	Downloads the request results to a Microsoft Excel 97-2003 compatible worksheet in HTML format, including tables or charts that appear with the results
Download to Powerpoint	Downloads the request results to Microsoft PowerPoint
Download Data	Downloads results as a tab-separated list of values with file extension .csv. This facilitates opening the file in Excel or a third-party application to display the data.
Download Web Page (MHTML)	Downloads results as a Web page. This allows you to download the underlying data for an existing request as a Web page (MHTML) file.

Table 8. Download Link Option Descriptions

Walkthrough/Activity

You will now complete Activity 6: Downloading Requests in your Activity Guide.

Participant Notes:

Lesson Review

In this lesson, you learned how to:

- Create common views to display request results
- Apply ordering to request results
- Add a subtotal to a request
- Add a formula to a request
- Add and save a single filter to a request
- Download request results

Participant Notes:

Lesson 4: Formatting Request Results

Objectives

Upon completion of this lesson, you will be able to:

- Format column content
- Edit column layouts
- Edit column appearances

Topic 1: Formatting Column Content

- Click the **Column Properties** button to open the **Column Properties** window
- Use the **Style** tab to choose font, cell, border, and advanced style formatting options for column data that is shown inside a cell in a tabular format, such as a table or pivot table. You can also choose settings for table and column headings.
- If you are overriding the default formatting properties for a column, your selections are static. If you are specifying conditional formatting properties for a column, your selections apply only if the condition is met.

  Note: Conditional formatting is not covered in this course.
- The selections for horizontal and vertical alignment are similar to text justification selections in word processors. Vertical alignment does not have any impact unless the column spans multiple rows of other columns.

Participant Notes:

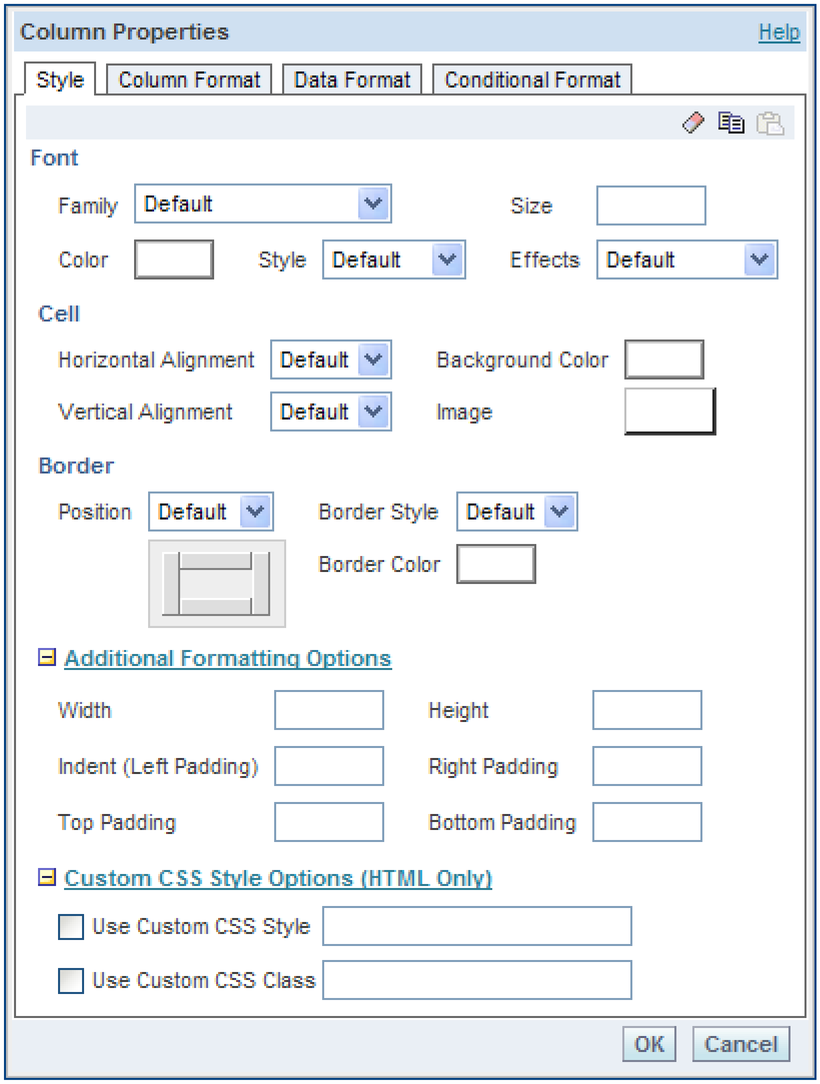

Figure 14. Column Properties Window – Style Tab

Participant Notes:

Field	Description
Font	Use this area to select the font family, size, color, style (such as bold), and any effects to apply (such as underlining)
Cell	Use this area to make alignment selections. This area is also used to insert an image inside of the cell and select a background color.
Border	Use this area to select the border position, color, and style of the cell
Additional Formatting Options	Use this area to adjust the size and padding (internal spacing) of the cell

Table 9. Column Properties Window – Style Tab Fields

Topic 2: Editing Column Layout

- Click the **Column Properties** button to open the **Column Properties** window
- Use the **Column Format** tab to:
    - Specify whether the column should appear in results
    - Assign alternate table and column headings and apply custom formatting to them
    - Include the TimeZone icon (date/time columns only)
    - Control the display of duplicate data
    - Specify the interaction that should occur when users work with the results

Participant Notes:

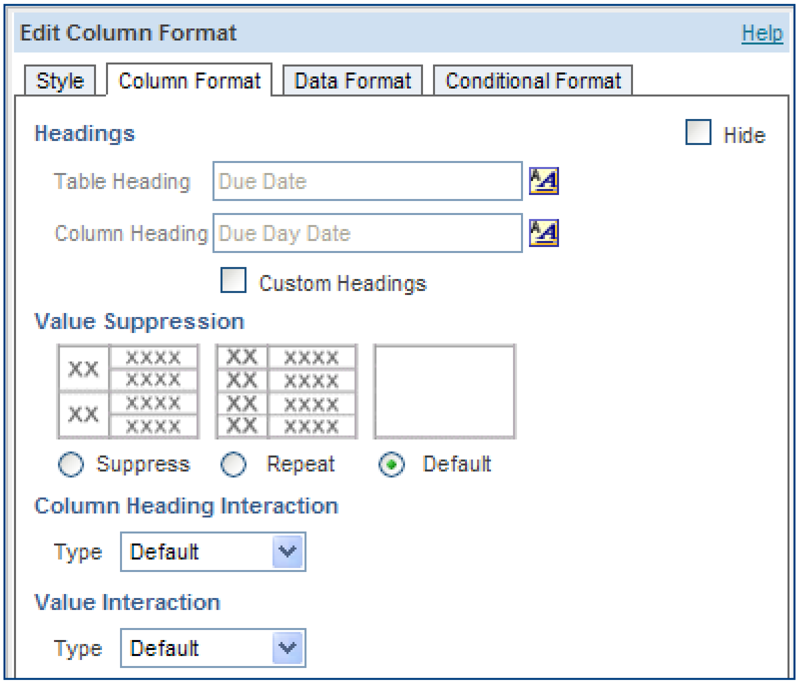

Figure 15. Column Properties Window – Column Format Tab

Field	Description
Hide checkbox	Use the checkbox to include or exclude the column from the request display. This allows you to include a column in your request that you do not want displayed in results, such as a column used in creating a filter
Headings	Use this section to create custom table and column headings and apply custom formatting. To make these fields active, you must select the Custom Headings checkbox.

Participant Notes:

Field	Description
TimeZone icon (not shown in the screenshot)	Used with a time zone header in a table or pivot view to show a user the name of the display time zone used in the column
Value Suppression	Used to control the display of duplicate data, such as repeating column labels. Displaying repeating or duplicated data only once can make a table easier to read.
Column Heading Interaction	Used to specify the interaction with the column headings that should occur when users work with the results, such as navigation to other requests or dashboards
Value Interaction	Used to specify the interaction with the values that should occur when users work with the results, such as navigation to other requests or dashboards

Table 10. Column Properties Window – Column Format Tab Fields

Topic 3: Editing Column Appearance

- Click the **Column Properties** button to open the **Column Properties** window
- Use the **Data Format** tab to edit properties for a column to control the appearance of the data. By default, your selections for a column apply only to the current request.
- This option allows you to override the default display characteristics. The selections that you see vary based on the data type.
    - Numeric data can be displayed as percentages, month names, or dates
    - You can choose the number of digits and decimal places to display, how to display negative numbers, and the thousands separator to use
    - If your column contains text, you can choose how to treat the text, such as plain text, HTML, or a link
- The fields displayed on the **Data Format** tab vary based on the type of data in the column. Use the fields that display to change the format of the data.

Participant Notes:

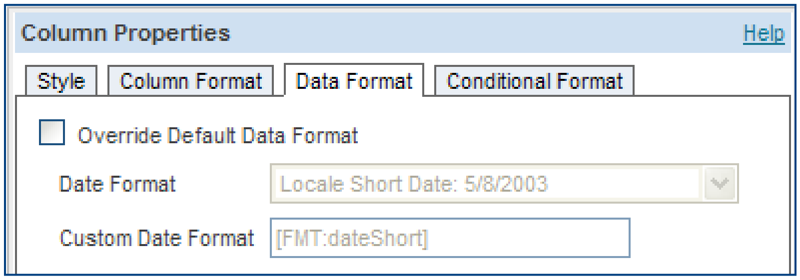

Figure 16. Column Properties Window – Data Format Tab Sample

Field	Description
Override Default Data Format checkbox	Select this checkbox to override the default data formatting. You must select this checkbox in order to edit the other fields.

Table 11. Column Properties Window – Data Format Tab Fields

Walkthrough/Activity

You will now complete Activity 7: Formatting Request Results in your Activity Guide.

Lesson Review

In this lesson, you learned how to:

- Format column content
- Edit column layouts
- Edit column appearances

Participant Notes:

Lesson 5: Working with Combined Filters

Objectives

Upon completion of this lesson, you will be able to:

- Group column filters
- Save a filter to use in another request
- Use a saved request as a filter

Topic 1: Working with Column Filters

- Column filters can be combined with other column filters from the same subject area to further constrain the results of a request
- Filters can be grouped (a capability called parenthetical filtering) to create complex filters without requiring you to know computer code
- You can combine column filters with “AND” and “OR” operators
    - The “AND” operator means that the criteria specified in each filter must be met. This is the default method for combining column filters.
    - The “OR” operator means that the criteria specified in at least one of the column filters must be met
    - You can also prevent the filter from being replaced during navigation and prompting using the **Protect Filter** option

Participant Notes:

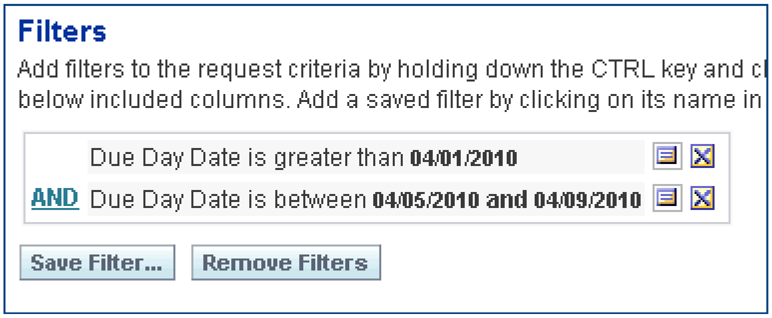

Figure 17. Filters Section - Combined Filters

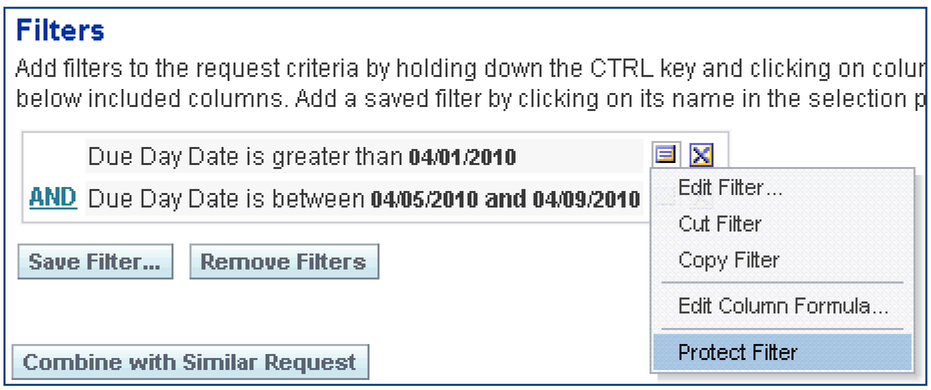

Figure 18. Filters Section - Protecting a Filter

Topic 2: Using Saved Requests as Filters

- Any saved request that returns a column of values can be used to filter the selected column in your request
- Save a filter from the **My Criteria** tab while working with a request to your individual folder, **My Filters**, for personal use or to the **Shared Filters** folder for others to use as well

Participant Notes:

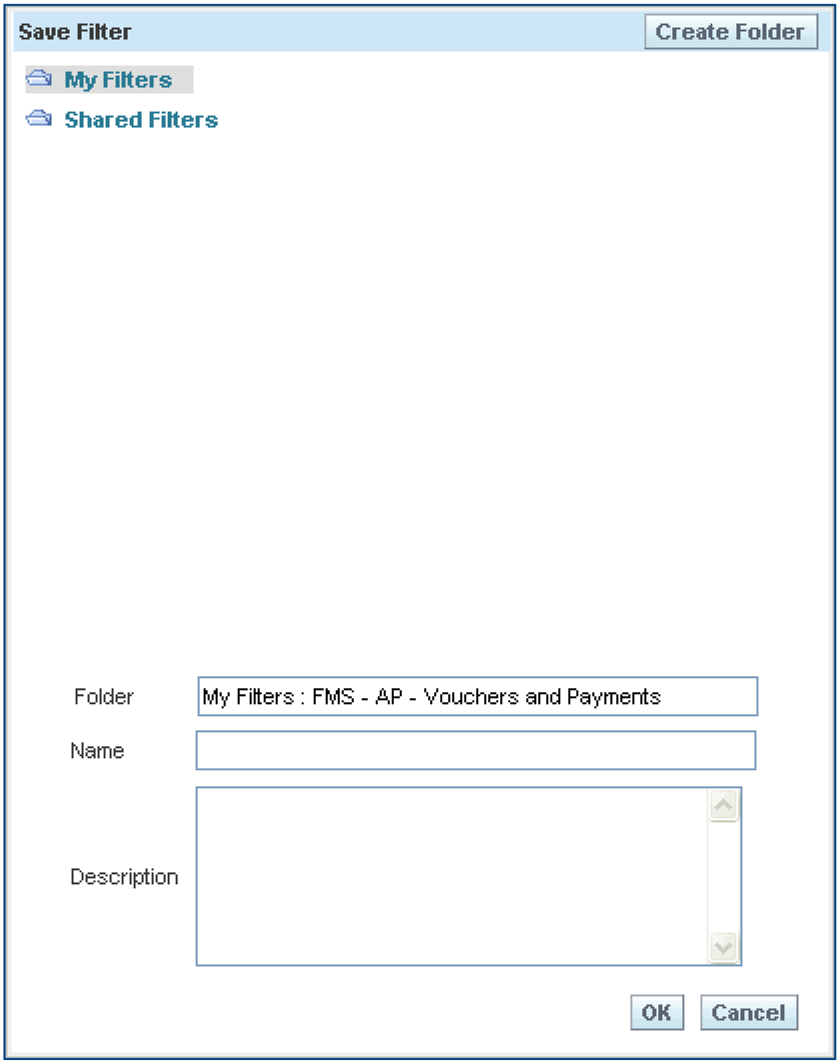

Figure 19. Save Filter Window

Participant Notes:

Walkthrough/Activity

You will now complete Activity 8: Working with Combined Filters in your Activity Guide.

Lesson Review

In this lesson, you learned how to:

- Group column filters
- Save a filter to use in another request
- Use a saved request as a filter

Walkthrough/Activity

You will now complete Activity 9: Creating and Formatting Requests in your Activity Guide.

Participant Notes:

Lesson 6: Creating Dashboards

Objectives

Upon completion of this lesson, you will be able to:

- Modify the content of an existing dashboard
- Add pages to a dashboard
- Set dashboard properties

Key Terms

- **Pages** – Pages contain the columns and sections that hold the content of a dashboard. Every dashboard has at least one page. In Interactive Dashboards, pages are identified by tabs across the top of the dashboard. Multiple pages are used to organize content.
- **Columns** – Used to align content on a dashboard. You can create as many columns on a dashboard page as you need. Every new dashboard page automatically contains one empty column with one empty section in it. The columns used in Dashboards are not related to the columns used in Answers.
- **Sections** – Areas within a column in the dashboard layout that hold the content dragged and dropped from the selection pane. Sections are used to organize content within a column.
- **Dashboard Objects** – Items that are used only in a dashboard, such as sections to hold content, navigation links, and embedded content appearing within a frame in a dashboard

Participant Notes:

Topic 1: Creating and Modifying Dashboards

- Basic layout of a dashboard is accomplished by adding or removing columns, setting the width in pixels or as a percentage of the dashboard page, and breaking columns apart to move one column under another
- After columns are aligned, sections are added to hold content. Sections are aligned vertically by default, but can be changed to horizontal.
  - You can drag as many sections as you need into a column.
  - If you drag and drop content into a column without first adding a section to hold the content, a section is created automatically.
  - If you drag a section from one column into another column, any content in that section is also included.
- Text and image links can be added to a dashboard to open another request or dashboard. Objects can be embedded within frames of a dashboard.
- If you have a collection of saved requests that you run frequently, you can add a view of the **Catalog** folder to a dashboard and then open the folder in the dashboard, navigate to a saved request, and click it to run it

Participant Notes:

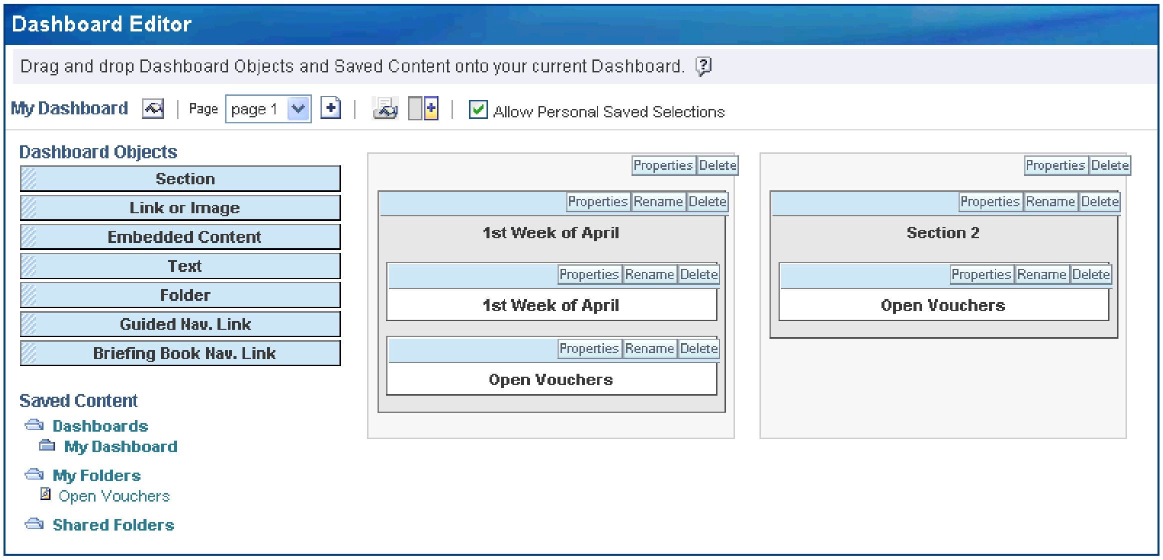

Figure 20. Dashboard Editor

Topic 2: Adding Dashboard Pages

- Pages contain the columns and sections that hold the content of a dashboard. Every dashboard has at least one page.
- Pages are identified by tabs across the top of the dashboard. Multiple pages are used to organize content. For example, you might have one page to store results from Answers that you refer to every day and another that contains related content from a separate Answers request.

Participant Notes:

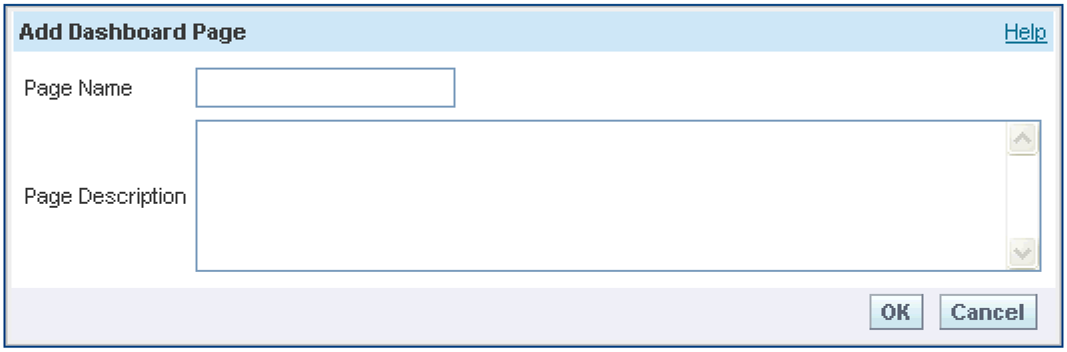

Figure 21. Add Dashboard Page

Walkthrough/Activity

You will now complete Activity 10: Modifying Dashboards in your Activity Guide.

Topic 3: Updating Dashboard Properties

- You can set properties for the entire dashboard, such as the style to use, and delete, reorder, and hide pages. Changing dashboard properties automatically saves any changes you made to the page you were working with.
- Styles control how dashboards and results are formatted for display
- There is no "undo" option when renaming, deleting, or changing permissions for a dashboard page. Be cautious when making changes.

Participant Notes:

Figure 22. Dashboard Properties Page

Walkthrough/Activity

You will now complete Activity 11: Updating Dashboard Pages in your Activity Guide.

Lesson Review

In this lesson, you learned how to:

- Modify the content of an existing dashboard
- Add pages to a dashboard
- Set dashboard properties

Participant Notes:

Lesson 7: Managing Views

Objectives

Upon completion of this lesson, you will be able to:

- Save, print, copy, delete, preview and refresh request views
- Create titles for requests
- Create narrative text for requests
- Create view selectors to choose alternate views of the same request results
- Show request results in a variety of charts

Topic 1: Completing Common View Tasks

- Several tasks are common to all views, including save, print, delete, and refresh results

Common Task	Description
Save	Click the **Save** button to save a new view or save changes to a modified view
Print	Click the **Print** button to create a printout of the displayed analysis as an HTML or PDF
Delete	Click the **Delete** button to remove the current view
Refresh Results	Click the **Refresh Results** button to refresh the results of the current analysis

Table 12. Common Tasks for all Views

Participant Notes:

Topic 2: Adding Titles

- **Title View –** Use the title view to add a title, a subtitle, a logo, and timestamps to the results

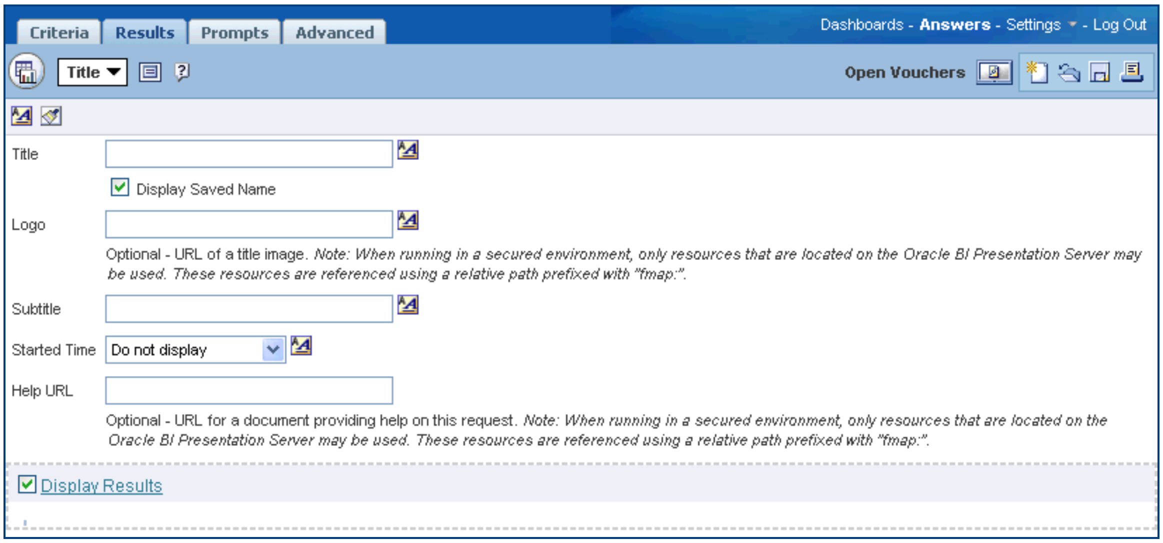

Figure 23. Title View Options

Participant Notes:

Topic 3: Using Text

- **Narrative Text** – Use this view to show the results as one or more paragraphs of text. You can type in a sentence with placeholders for each column in the results, and specify how rows should be separated.

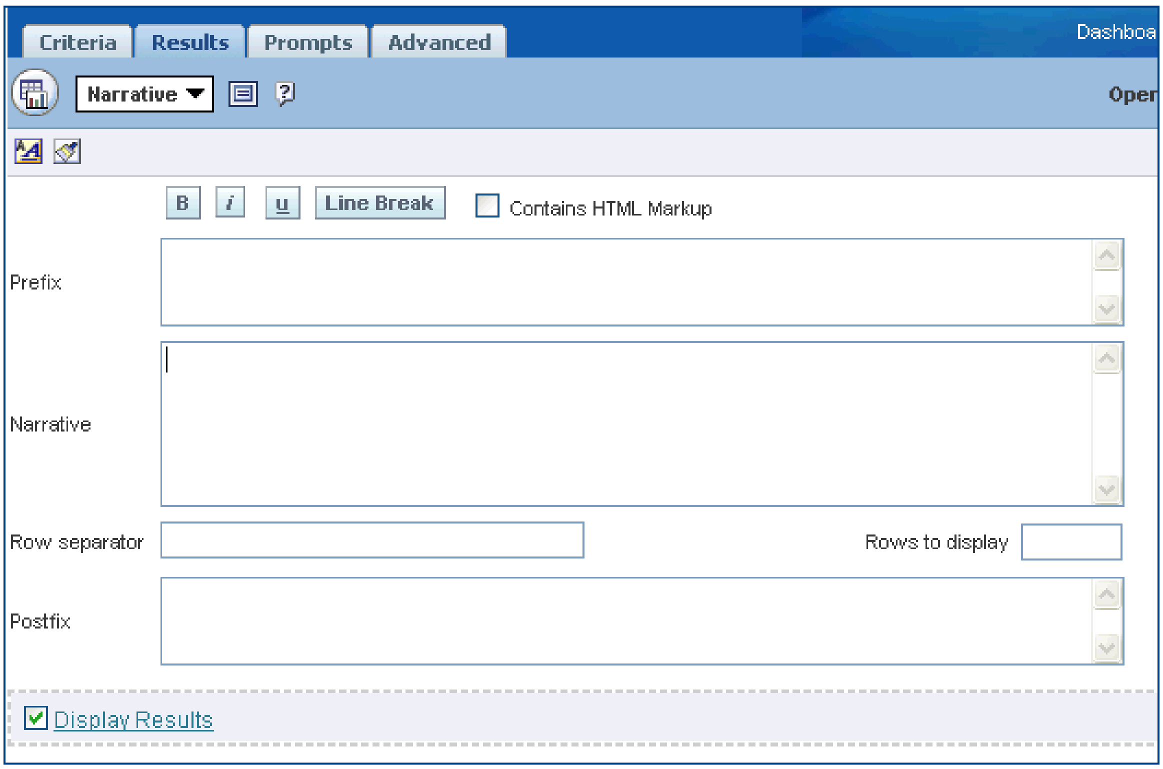

Figure 24. Narrative View Options

Participant Notes:

Topic 4: Using Selectors

- **View Selector –** Use this view to permit report viewers to choose a specific view of the results from among the saved views. When placed on a dashboard, the view selector appears as a drop-down list from which report viewers can make a selection.

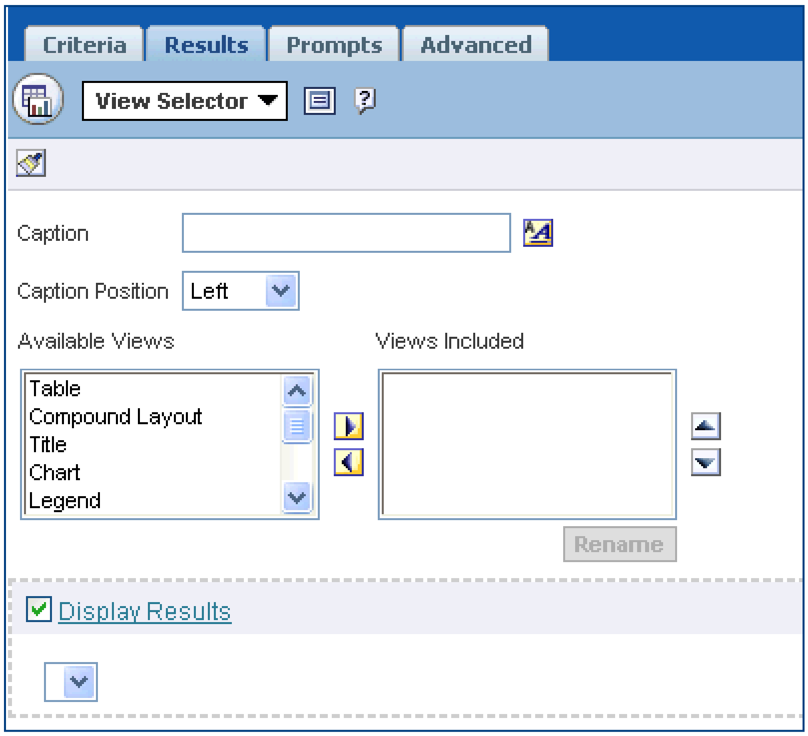

Figure 25. View Selector View Options

Participant Notes:

Topic 5: Using the Chart View

- Use the **Chart View** to drag and drop columns to a layout chart. You can customize the title, legend location, axis titles, and data labels as well as the size and scale of the chart.
- Chart types include bar charts, column charts, line charts, area charts, pie charts, and scatter charts
- Chart styles include two- and three-dimensional, absolute, clustered, stacked, combination, and custom

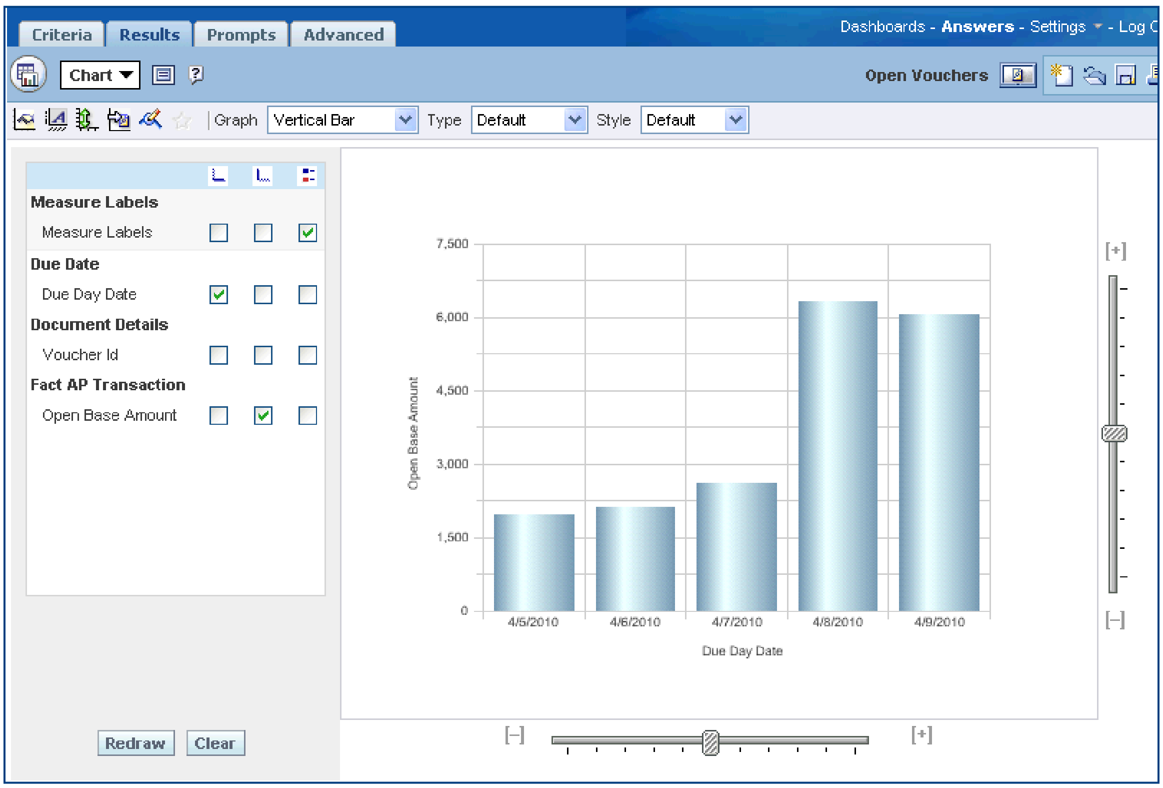

Figure 26. Chart View Sample

Participant Notes:

Walkthrough/Activity

You will now complete Activity 12: Creating Compound Layouts in your Activity Guide.

Lesson Review

In this lesson, you learned how to:

- Save, print, copy, delete, preview and refresh request views
- Create titles for requests
- Create narrative text for requests
- Create view selectors to choose alternate views of the same request results
- Show request results in a variety of charts

Participant Notes: