



National Finance Center  
Office of the Chief Financial Officer  
U.S. Department of Agriculture

October 2024

# Insight



PROCEDURE MANUAL  
Insight Enterprise Reporting





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## Latest Update Information

The following change has been made to the Insight procedure:

Section	Description of Change
<b>Scheduling Reports to Run</b>	Removed due to the scheduling feature no longer being available to the Agencies.





## Accessibility for Users of Assistive Technology

The National Finance Center (NFC) is committed to providing applications that may be used with assistive technology.


In order to meet this commitment, NFC will comply with the requirements of the United States Access Board.

NFC must ensure that users with disabilities be provided with access to have the same options within an application as those with no disability unless an undue burden would be imposed upon NFC.

### Help for Users of Assistive Technology

Online help utilizes hypertext markup language (HTML) frames that display help in a separate browser. Each Help page contains a Table of Contents with links and Help content. Some Help topics include one or more Related Topics.

#### To Navigate within Frames:

1. Select the **Help**  icon. The browser opens. By default, the focus is on the content pane.
2. Select the **Tab** key to move the focus to the Related Topics (if any).
3. Select the **Enter** key to open a related topic link.

#### OR

Select the **Tab** key to move the focus to the Table of Contents.

4. Select the **Enter** key to open a different help topic link.

#### To Navigate and Select Options from a Select Box or Combination Box:

- Press the spacebar to expand all options.
- Press the Up and Down Arrow keys to move through the options.
- Select the **Enter** key to make a selection.

#### Navigation with Keyboard Shortcuts/Commands

- To move forward from link to link or to interactive elements, select the **Tab** key.
- To move backward from link to link or to interactive elements, select the **Shift + Tab** keys.
- To select hyperlinks, select the **Enter** key.
- To select a particular key, tab to the particular button and select the **Enter** key.



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Note: Some commands may not be supported by all browsers.

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### **Contact Information for Users of Assistive Technology**

If you experience an issue due to accessibility as defined by the United States Access Board, please contact your Agency Servicing Personnel Office (SPO) for assistance. Authorized Agency Contacts (AACs) listed in Table Management System (TMGT) Table 063, DEPARTMENT/AGENCY/BUREAU CONTACT, Contact Type 31, should call the NFC Contact Center at **1-855-NFC-4GOV (1-855-632-4468)**. When contacting the applicable person, please include all information regarding the function that you are trying to use within the application.



## Typographical Conventions

Convention	Example
References to a button are indicated by Courier New font and in bold.	Select the <b>Save</b> button.
References to email addresses are indicated in italics.	For additional assistance, send email to <i>jane.doe@usda.gov</i> .
References to menu options are indicated in italics and in bold.	To print the Earnings and Leave (E&L) Statement, select <b><i>File &gt; Print</i></b> .
References to system messages are indicated by Courier New font and are italicized.	The message <i>Changes have been made. Save changes?</i> is displayed.
References to valid values are indicated by Courier New font and are italicized.	Valid values are <b><i>None</i></b> , <b><i>End</i></b> , or <b><i>Start</i></b> .
References to actual data are indicated by Courier New font.	Enter <b>10</b> into the field.
References to telephone numbers are indicated in bold.	For assistance, call <b>1-800-555-1212</b> .



## Feedback

You can provide feedback to the National Finance Center (NFC) from within the web version of the manual. Select the **Send Us Feedback** button on any page within the manual. A popup will appear for you to add comments. Your response generates an email that automatically identifies your exact location in the document so that we can better address your comments and/or questions.





## Overview

Insight is an enterprise-wide data warehouse and reporting solution with advanced reporting and business intelligence capabilities. Insight's functionality eases reporting whether a user is running an existing analysis, responding to ad hoc reporting requests, or using analysis for strategic planning.

The solution integrates multiple data sources into one application to provide comprehensive reporting through a library of standard analysis and ad hoc reporting functionality. The dashboard feature allows users to manipulate data analysis in an easy, time-efficient manner, enabling the development of innovative business Insights.

### How Insight Works

Insight allows users to make data-driven strategic decisions by providing a full range of advanced reporting options, from executive-style dashboards to managerial dashboards to operational reporting, which includes:

- Summary-level dashboards, KPIs, and predictive analytics
- Management summary reports, drill-down analysis, trend analysis, and variance analysis
- Detailed employment reports, transactional processing reports, and case management reporting

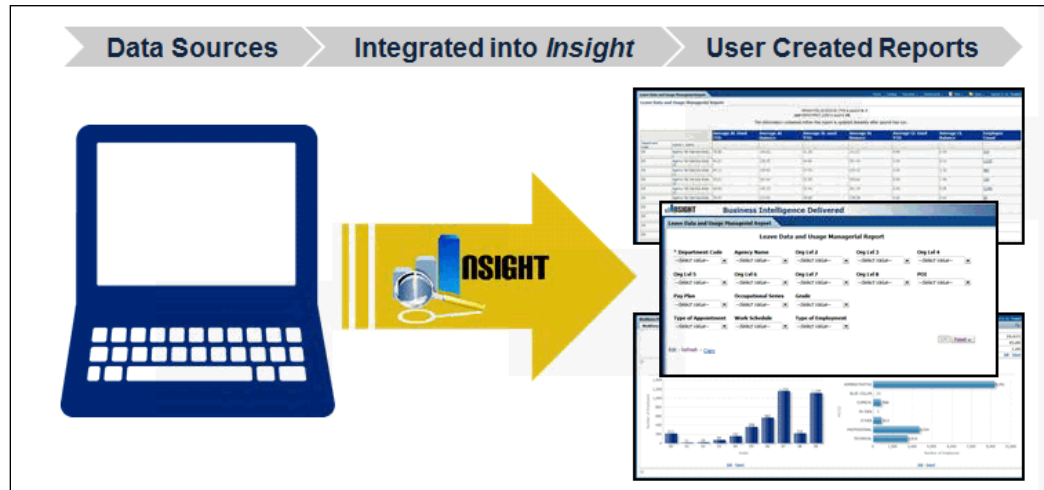


Figure 1: How Insight Works



## Reporting Capabilities

Insight is a modern reporting and analytics solution that addresses the full range of user needs, from operational reporting to executive dashboards and predictive analytics. Insight provides the following types of reporting:

- Operational Reporting—Detailed employment reports, transactional processing reports, and case management reporting.
- Management Dashboards and Metrics Management summary reports—drill-down analysis, trend analysis, and variance analysis.
- Scorecards, Executive Dashboards, and Analytics—Summary-level dashboards, KPIs, scorecards, and predictive analytics.

Insight provides a consolidated data warehouse with advanced business intelligence and reporting capabilities that support a wide range of business needs.

Key features include:

- A single, integrated system of data
- Replacement of legacy reporting applications with an intuitive reporting solution
- Secure access based on user roles and provisioning
- Intuitive dashboards with drill-down analysis capabilities
- Standard common reports
- Ability to create Agency-specific reports
- Powerful ad hoc report functionality
- Drag and drop functionality
- Multiple exports
- Printing capability

## System Access

To grant and/or remove Insight access your Agency Security Officer (ASO) must complete and submit Form AD-3100-R, National Finance Center Web Applications Request For Security Access and/or Form AD-3100-RCI, Multiple Users for Insight (continuation sheet) to NFC. ASOs must submit security request forms via ServiceNow. If there are problems with security access after it has been administered, or if a user's account is suspended due to inactivity, the ASO should contact the Operations and Security Center (OSC) at **1-800-767-9641**, email [osc.etix@usda.gov](mailto:osc.etix@usda.gov), or submit a ticket via the ServiceNow.



## Hardware and Software Requirements

The following technology components are required for Insight to operate as designed:

### Browser Requirements:

Insight is compatible with Microsoft Edge, Mozilla, Firefox, and Google Chrome.

### Export Feature Requirements:

- Adobe Reader installed (to export to PDF)
- Microsoft Office 2003 required (2007 or higher recommended)
- Java and ActiveX required to display the File Download dialog box
- Popups allowed

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Note: If the export has over 50,000 rows, it is recommended to export to .CSV instead of Excel to decrease the size of the file.

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## Role-based Security

The security roles in Insight are based on several factors, such as user level, organization level, subject area level, and data element level.

### Types of Security

Insight security and access protocols provide tailored access to data based on ASO approved authorization.

Security Level	Definition
<b>User Level Security</b>	Insight users are provisioned into one of three roles: <ul style="list-style-type: none"> <li>• Insight Consumer Summary - View Data Only</li> <li>• Insight Consumer All - View Detailed and Summary Data</li> <li>• Insight Author All - Create, Edit, Share Reports</li> </ul>
<b>Organization Level Security</b>	Insight users are provisioned at: <ul style="list-style-type: none"> <li>• Department level</li> <li>• Agency level</li> <li>• Organization level or Personnel Office Identifier (POI) level</li> </ul>
<b>Subject Area Level Security</b>	Insight users are provisioned to view and edit Subject Area data.



Security Level	Definition
<b>Data Element Level Security</b>	Insight users are provisioned with sensitive data, such as Social Security number (SSN) and diversity information.
<b>RETM</b>	Insight users are provisioned with retirement data access.

### ***User Level Security***

Insight roles restrict actions a user may take in Insight when accessing operational reports in the Common Report Library or creating ad hoc reports.

Roles	Access and Capabilities
<b>Consumer Summary</b>	<ul style="list-style-type: none"><li>• Access to managerial reports in Common Report Library</li><li>• Access to dashboards</li></ul>
<b>Consumer All</b>	<ul style="list-style-type: none"><li>• Access to managerial reports in Common Report Library</li><li>• Access to dashboards</li><li>• Access to operational (Employee Level) reports in Common Report Library</li></ul>
<b>Author</b>	<ul style="list-style-type: none"><li>• Access to managerial reports in Common Report Library</li><li>• Access to dashboards</li><li>• Access to operational (Employee Level) reports in Common Report Library</li><li>• Ability to edit and customize common report</li><li>• Ability to edit and customize dashboard in Common Report Library</li><li>• Ability to create ad hoc reports</li><li>• Ability to save to My Folders</li><li>• Ability to save to Shared Folders</li></ul>

### ***Organization Level Security***

There are three types of access from a security provisioning point of view:

- All Groups - NFC only
- Organization Level - User has access to data at the organization level and can view specified Org Level codes (e.g., Org Level 2)



- POI - User has access to data at the POI level and can view specified Personnel Office Identifiers

### ***Subject Area Security***

Access to a Subject Area gives users the ability to view data and common reports from that Subject Area. Users with Author access will be able to create ad hoc reports and dashboards based on their Subject Area access.

Below is a list of available Subject Areas:

- ABCO Accounting Collection Control
- ABCO Bill Adjustment
- ABCO Bill Collection
- ABCO Billing
- ABCO Claim
- ABCO Claim Refer
- ABCO Receivable
- ABCO Receivable Account
- ABCO Receivable Detail
- ABCO TOP
- ADJP\_REPORTS
- AI Details
- MASC
- MD715 Personnel History
- MD715 Workforce Profile
- PACS Above Earnings
- PACS App Charge
- PACS Appointment Limitation
- PACS Charitable Contribution
- PACS Child Support And Alimony
- PACS Differential Pay
- PACS Earn Leave Detail



- PACS Earning Limitation
- PACS Financial Allotment
- PACS Flexfund
- PACS Health
- PACS Leave
- PACS Life Insurance
- PACS Lump Sum
- PACS Pay Header
- PACS Prorated Allowance
- PACS Receipt
- PACS Retirement
- PACS TA Extension
- PACS TA History
- PACS TA Miscellaneous
- PACS TSP Collection
- PACS Tax
- PACS Thrift Saving
- PACS Union Dues
- PMSO
- POL Details
- Personnel History
- SETS
- TMGT
- WebTA Snapshot Timesheet View
- WebTA TS Entry
- WebTA TS Profile
- WebTA Time-In/Time Out
- Workforce Profile

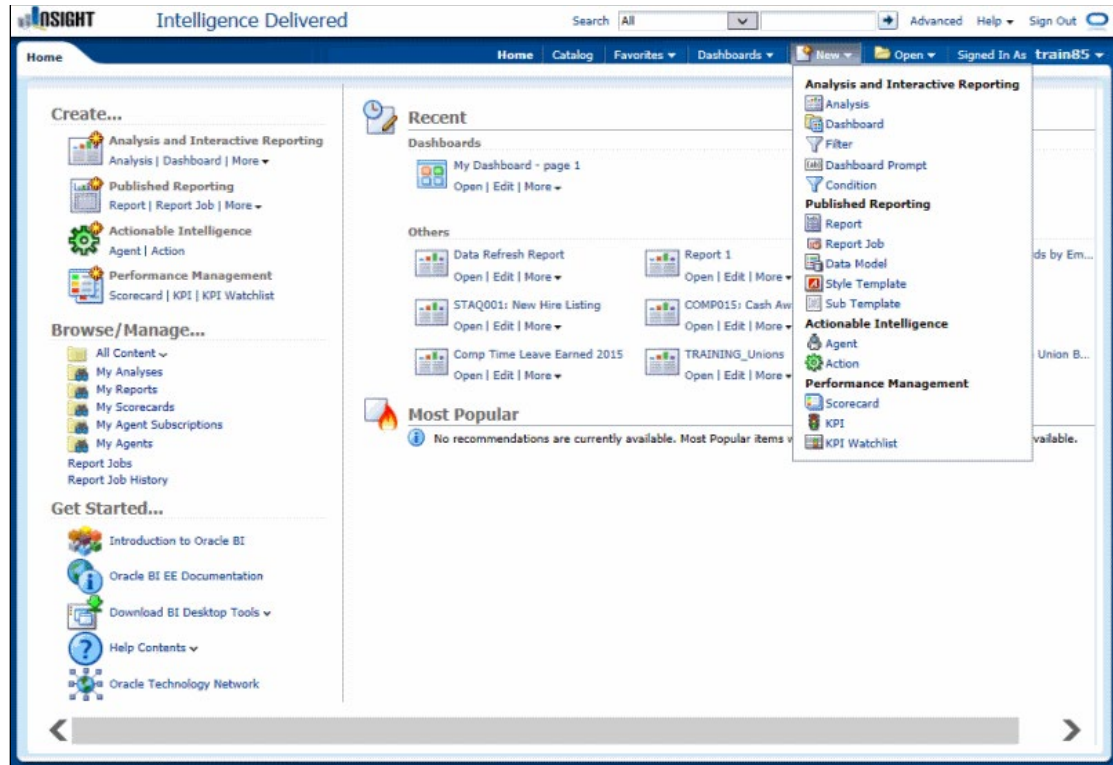


Figure 2: Insight Home Page With Subject Area Access

Based on provisioning, Subject Areas will be displayed in the Select Subject Areas drop-down menu below.

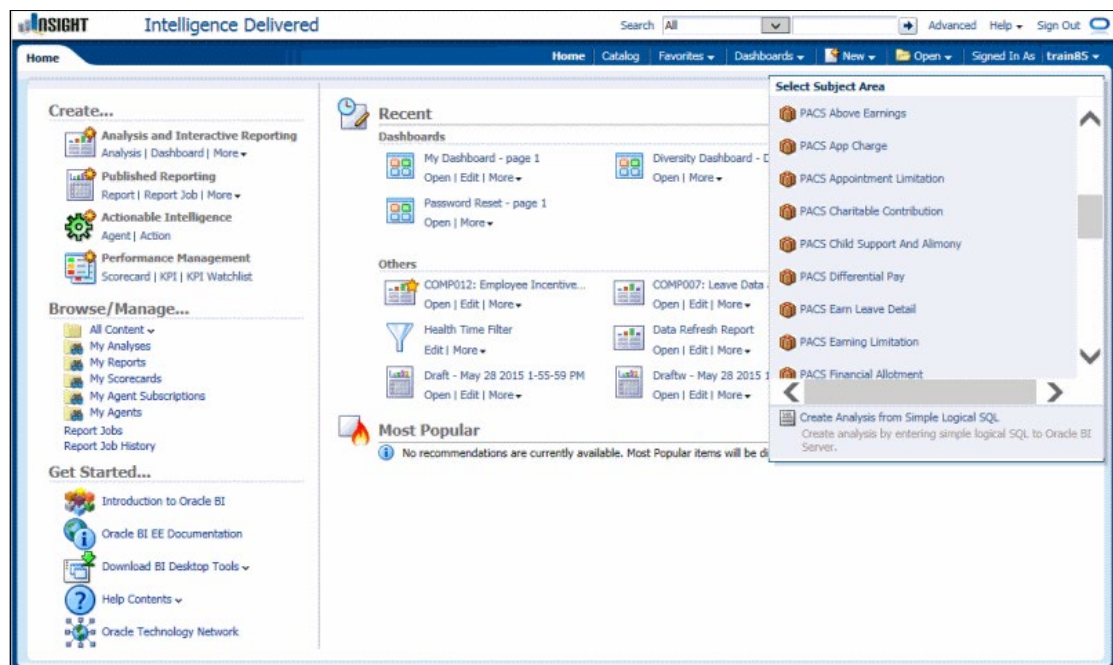


Figure 3: Subject Area Provisionings



### **Data Element Level Security**

Access can be tailored for different types of sensitive information, such as SSN and diversity information. Users can be provisioned with up to five different designations of sensitive information.

<b>Sensitive Information</b>	<b>Description</b>
<b>SSN</b>	Insight users can be provisioned to view SSN.
<b>Union</b>	Insight users can be provisioned to view union information such as union code, union dues amount, and date of union authorization.
<b>Disability-Veteran Status</b>	Insight users can be provisioned to view disability and veteran information, such as disability code and status and veteran preference code.
<b>Diversity</b>	Insight users can be provisioned to view diversity information such as Ethnicity and Race Indicator (ERI) code and Race and National Origin (RNO) code.
<b>Other</b>	Insight users can be provisioned to view other information such as within rate increase (WRI) data and performance evaluation data.

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Note: Some Insight users may be provisioned to only see non-sensitive information, such as organization code, name, salary, or age.

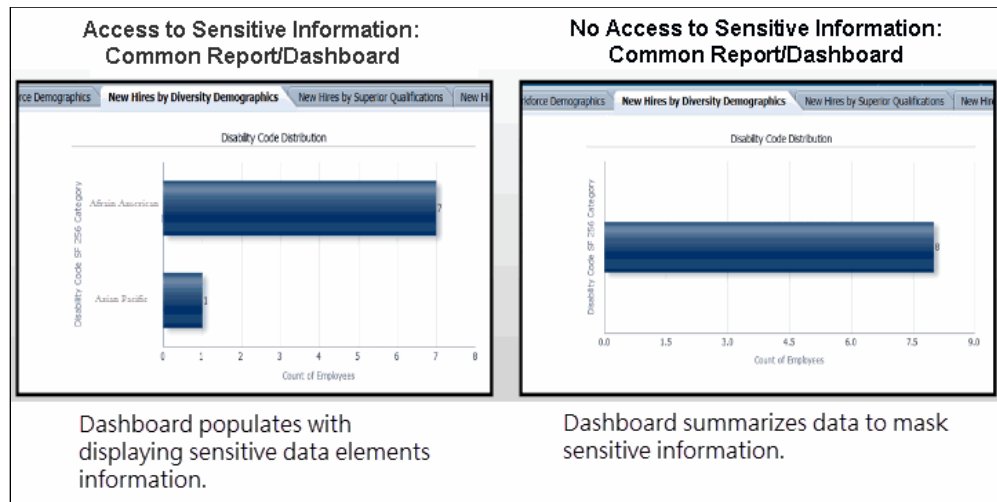
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## Sensitive Information

Whether or not a user has access to sensitive information determines what is displayed. A report with access to sensitive information displays sensitive data elements. A report with no access to sensitive information masks those data elements.



**Figure 4: Comparison of Access to Sensitive Diversity Information**





## Getting Started

This section provides instructions for accessing and exiting Insight, describes the application's design, and how to use its operating features.

## Sign In Instructions

### To Sign Into Insight:

1. Connect to the internet.
2. Connect to the *NFC Home Page* (<https://www.nfc.usda.gov>).
3. Select **Applications**.
4. Select the **Insight** icon on the Application Launchpad.



Figure 5: Insight Icon on NFC Home Page



The Sign In page is displayed.

**INSIGHT** Intelligence Delivered [Help](#)

**Sign In**  
Enter your user id and password.

User ID

Password

☐ Accessibility Mode

English

**WARNING**

You are accessing a U.S. Government information system, which includes (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only. Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties. By using this information system, you understand and consent to the following:

- o You have no reasonable expectation of privacy regarding any communications or data transiting or stored on this information system. At any time, the government may for any lawful government purpose monitor, intercept, search and seize any communication or data transiting or stored on this information system.
- o Any communications or data transiting or stored on this information system may be disclosed or used for any lawful government purpose.
- o Your consent is final and irrevocable. You may not rely on any statements or informal policies purporting to provide you with any expectation of privacy regarding communications on this system, whether oral or written, by your supervisor or any other official, except USDA's Chief Information Officer.

**WARNING**

Figure 6: Insight Sign In Page

5. Complete the fields as follows:

Field	Description/Instruction
User ID	Enter your Insight user identification (ID).  <u>Note: Your Insight user ID is the same as your Mainframe ID except the user ID must be capitalized.</u>
Password	Enter your Insight password.



## Sign Out Instructions

For security purposes, Insight automatically signs the user off the application and defaults to the Sign In page after a defined period of time of inactivity (determined by the security administrator). To return to the application, the user may once again sign into the application.

### To Sign Out of Insight:

1. Select **Sign Out** on the navigation bar on any Insight page.

Upon logging out, a confirmation message will be displayed, *Thank you for using Oracle Business Intelligence software. You have successfully signed out. To sign in again, click here.*

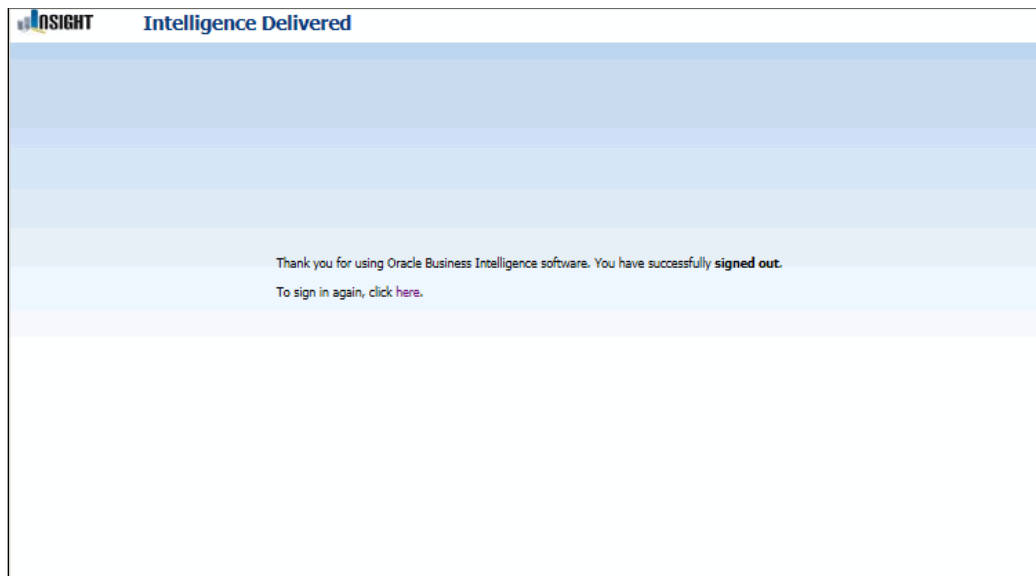


Figure 7: Sign Out Confirmation Page

## Password Reset

Insight users whose passwords do not meet the secure password criteria will be required to change their password upon accessing Insight. The user's password will be set to expire 60 days after a password is changed.

---

Note: Users must wait five minutes before trying to use Insight after a password change in order for the security cache to clear the "No Access" property.

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### Reset Password

Insight offers two alternatives to reset your password.

- **Dashboard** action link
- **Shared folders** in the **Catalog** page



### To Reset a Password Using the Dashboard Action Link:

1. Select the **Dashboards** action link from the top navigation bar.
2. Select **Password Reset** from the Dashboards drop-down menu.

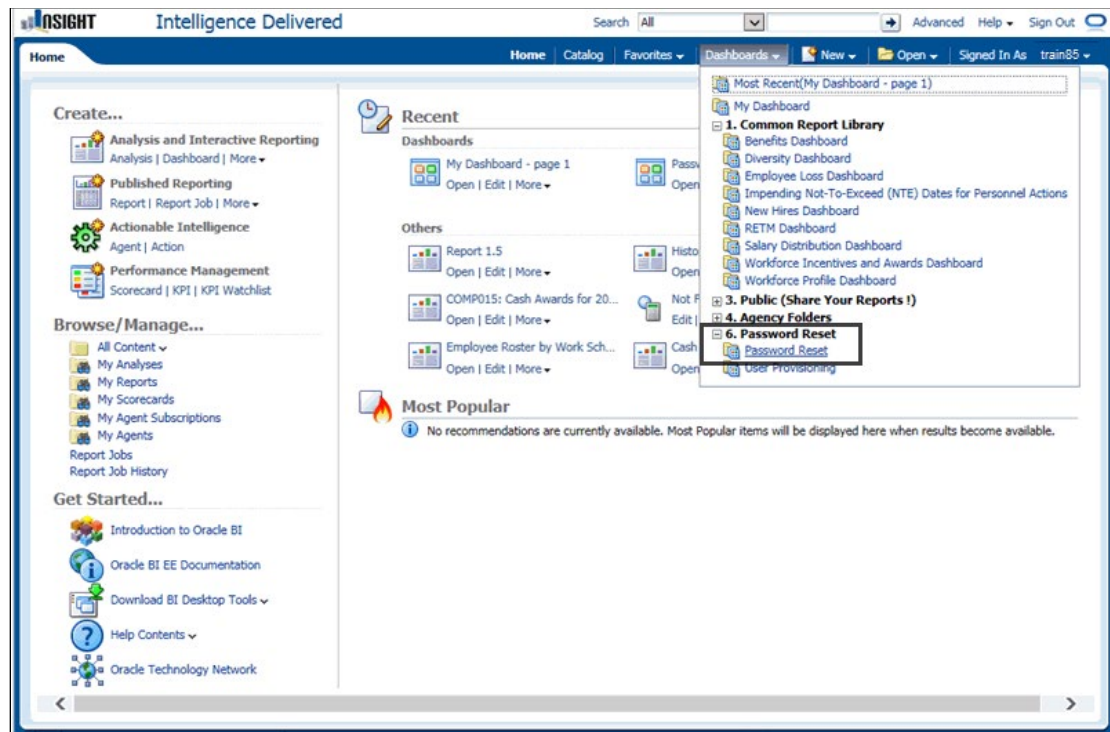


Figure 8: Password Reset Option in the Dashboard Drop-Down Menu

3. Select **Password Reset** link.

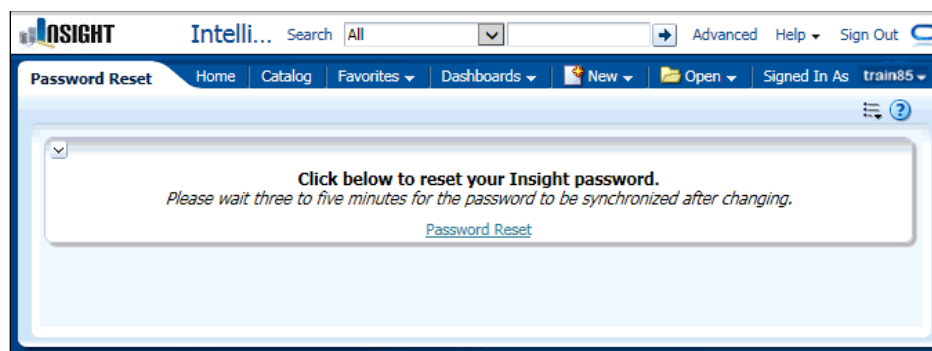


Figure 9: Password Reset Page

4. Follow the instruction on the Reset Password page.

When resetting your password be sure to:

- Type your current password correctly.



- Comply with the outlined password policy.
- Match your new password in both text fields.

5. Select **Submit**.

Note: If you need help with resetting your password, contact your organization's ASO, who will work with NFC to reset your password and provide you with a temporary password. Once you receive the temporary password, you must log into Insight to change the password.

### To Change Your Password Using the Catalog Option:

1. Select **Catalog** from the top navigation bar.
2. Open **Shared Folders** located in the Folders pane.
3. Select **Password Reset**. The Password Reset page is displayed.

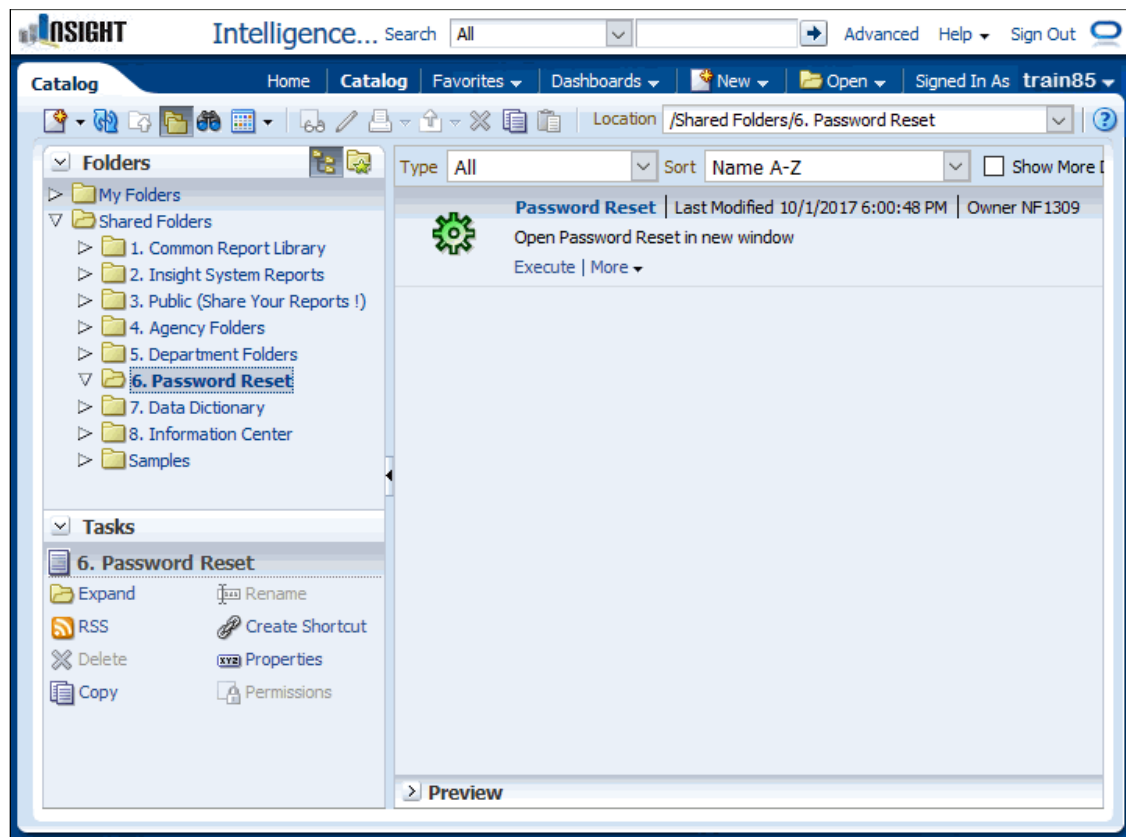


Figure 10: Password Reset in Shared Folders

4. Select **Execute** under **Password Reset** located in the report pane.
5. Follow the Password Policy to reset your password.
6. Select **Submit** to reset your password.



Note: Once the new password is entered in the fields, do not press **Enter** as it will clear the form fields and will not submit the password reset request.

If an error occurred a message will appear, *Error processing validation*.

7. Validate that your password update is complete by viewing the *Password Update Successful* message at the top of the Reset Password page.
8. Select **Cancel** to close the page and return to Insight.

## Using Online Help

Complete online documentation is included with Insight in a standard online help system. This standard online help includes navigating through the toolbar, various buttons on the page, and a full-text search. Select the following to access **Help Contents** for Oracle BI EE:

- The **Help** option above the navigation bar provides access to additional help information.

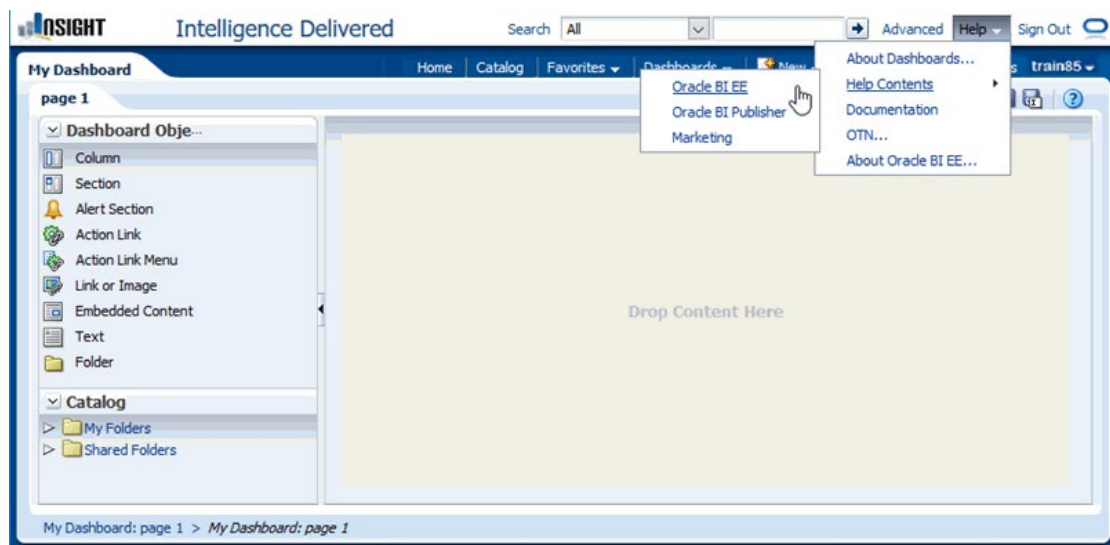




Figure 11: Help Option on Navigation Bar

-  The **Help** icon provides access to context sensitive help.





Below is an example of the context sensitive help.

[Contents](#)

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## Catalog page

Use the Catalog page to locate objects in the catalog and perform tasks specific to those objects. The objects and options that are available to you are determined by your system privileges and the permissions assigned to individual folders and objects.

Use the Catalog page to:

- Perform basic tasks. For example, open, copy, delete, search for objects, and create folders.
- Move objects by dragging and dropping them to different locations within the catalog.
- Perform object-specific tasks. For example, assigning an agent or adding an object to a briefing book.
- Archive specific folders, objects, or the entire catalog.
- Set permissions on individual objects and folders.

**Figure 12: Catalog Help Page**

## Who To Contact for Help

If you experience any issues related to Insight or have any questions, authorized SPO representatives should contact the NFC Contact Center at **1-855-NFC-4GOV (1-855-632-4468)** or via the customer service portal.

## Additional Resources

To obtain additional information about Insight, the following sources are available:

- Insight web page is located on the [NFC Home page](#), under the Client Services, HR/Payroll Initiatives.
- Quick Reference Guides, Frequently Asked Questions (FAQs), and other resources are available on the Insight web page via the Resource Materials link.
- Training materials are available in NFC University.
- NFC offers a 3-day training course on Insight covering topics from basic navigation through more advanced reporting functionality. If your Agency is interested in NFC-conducted training, please contact the Client Services Directorate (CSD), Training and Communications Branch (TCB) via ServiceNow.

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Note: Stay connected by receiving email notifications that contain the latest updated information about Insight by selecting the Subscribe link on the top of any NFC web page.

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## My Account

Users should check to make sure they have the right access to view, edit, and create within Insight.

### To Review the User's My Account:

1. Sign in to Insight.
2. Select the applicable user ID in the Signed In As field.

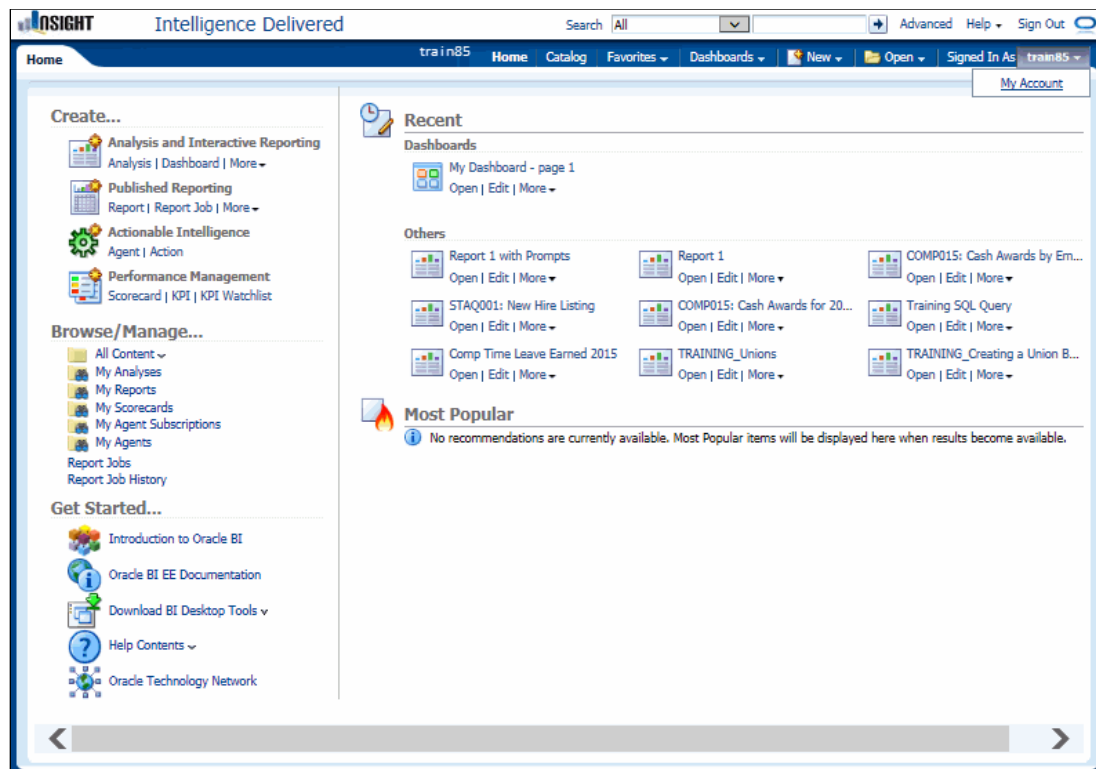


Figure 13: Insight Home Page With User's My Account

3. Select My Account from the Signed In As drop down. The home page is displayed.
4. Select **Preferences**.
5. Navigate to verify the Analysis Editor is set to Start on the Criteria tab when editing Analysis.

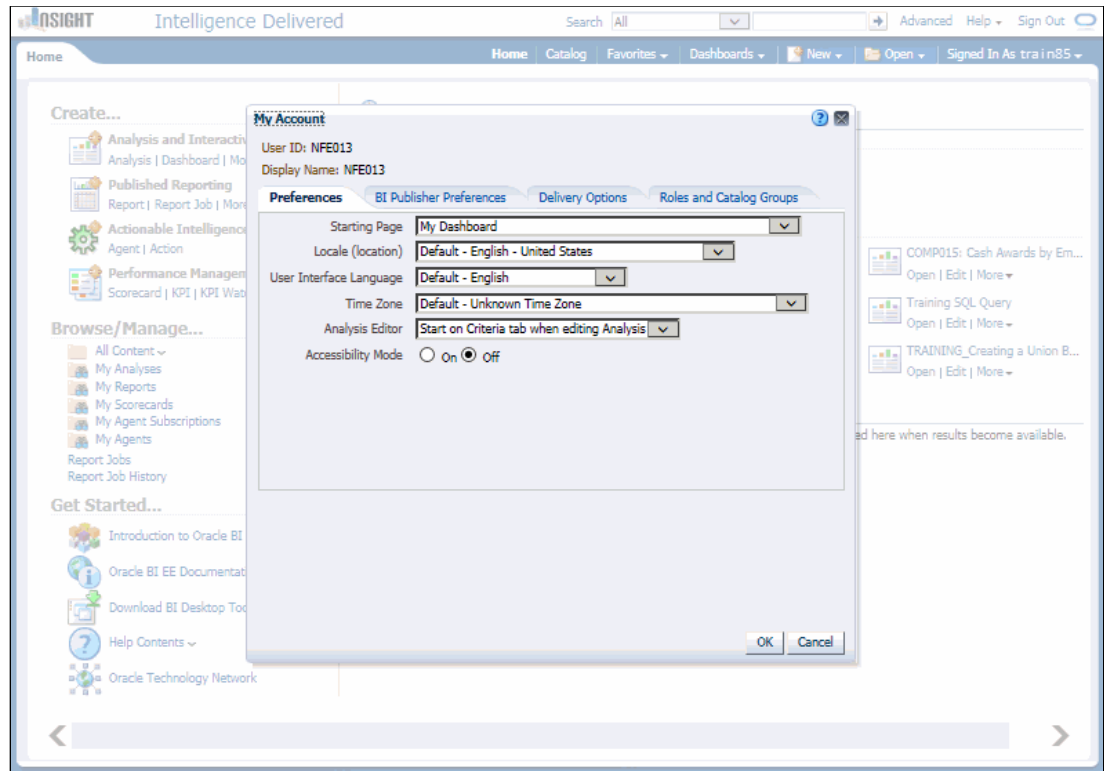


Figure 14: Preferences Page

## Provisioned Access

### To View a User's Provisioned Access:

1. Log on to Insight.
2. Select user ID located next to the Signed In As field.
3. Select **My Account**.

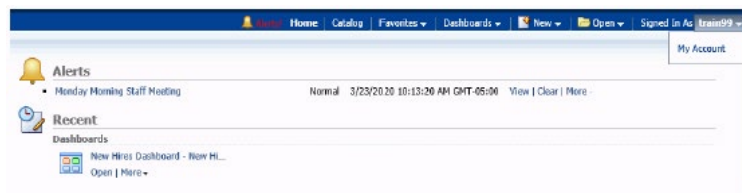


Figure 15: My Account Link

4. Select the **Application Roles** tab to view what options you are allowed to view. The Application Roles tab for the user is displayed.



**Figure 16: Application Roles**





## Data Within Insight

This section contains information on the way users interact with data in Insight, the frequency of data updates in the warehouse, and resources available for understanding data in Insight.

### Data Structure

Once Insight pulls data from the source systems, it is combined and structured so that information of similar types may be easily accessed.

- **Subject Area** - The broadest category of data (e.g., Workforce Profile in the figure below).
- **Folder** - A common theme by which data elements are structured in a Subject Area. Folders can appear within multiple Subject Areas (e.g., Appointment Type in the figure below).
- **Data Element** - The building blocks for reports. There are three different types of data elements visible within the ad hoc environment (e.g., APPOINT\_TYPE\_DESCR in the figure below).
- **Value** - The individual piece of information reported for a data element. Values can change as data refreshes in Insight (e.g., Expedite in the figure below).

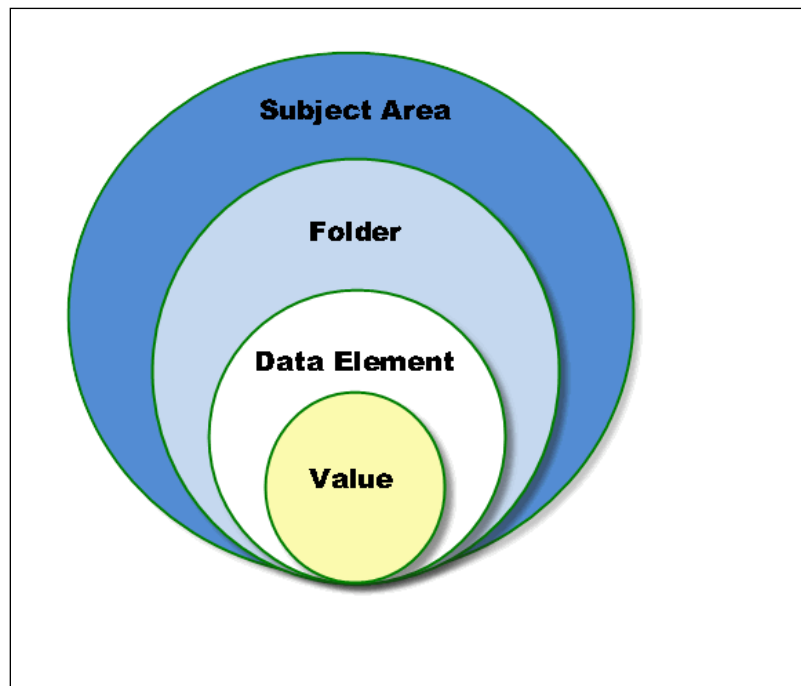


Figure 17: Data Structure in Insight

The hierarchy of information is demonstrated within the Subject Areas pane in the ad hoc editing page.



- Subject Area: Workforce Profile
- Folder: Appointment Type
- Data Element: APPOINT\_TYPE\_DESCR
- Value: Excepted - Conditional

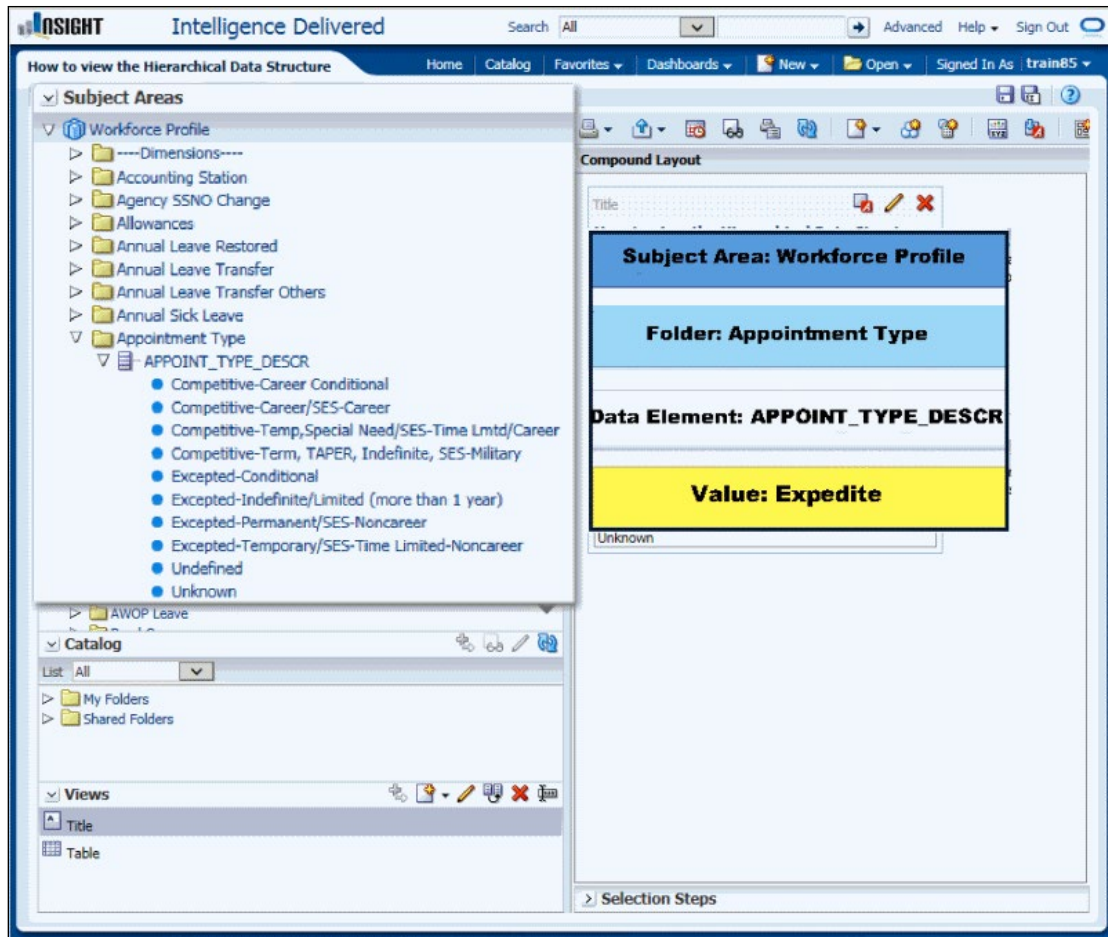


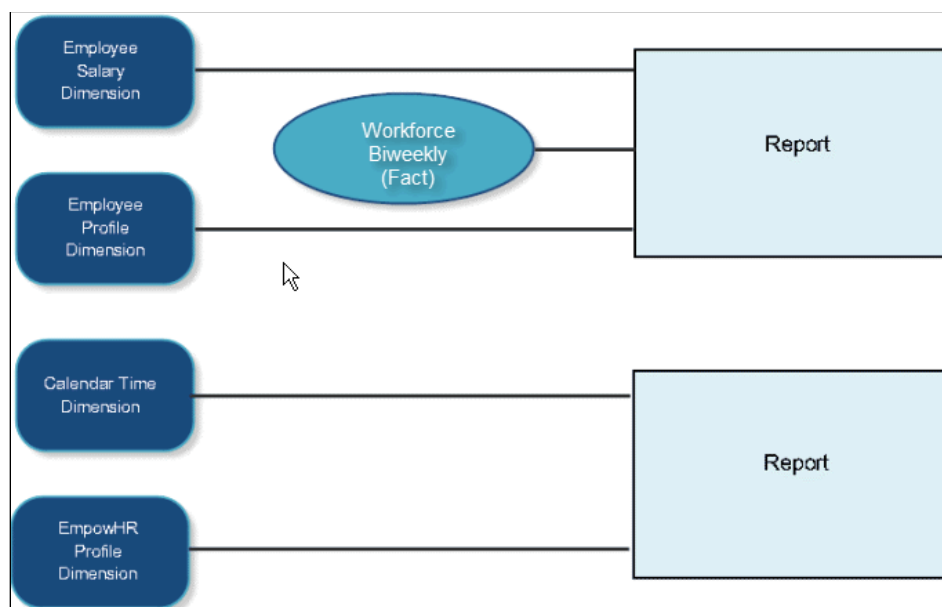
Figure 18: Hierarchical Data Structure

### Data Structure in Insight Subject Area

Subject Areas are composed of dimension tables and fact tables.

- Dimension tables contain descriptive attribute data.
- Fact tables contain metrics data.





**Figure 19: Reports Generated from Dimension Tables and/or Fact Tables**

## Key Terms

**Action:** Provides functionality to navigate to related content or to invoke operations, functions, or processes in external systems. You can include actions in analysis, dashboard pages, agents, scorecard initiatives, and key performance indicators (KPIs).

**Action Links:** A link to an action that you have embedded in an analysis, dashboard page, scorecard objective, scorecard initiative, or KPI that, when selected, runs an associated action.

**Analysis:** An analysis, often referred to as a report, depicts a query of an organization's data to answer a business question. Analysis can include tables, texts, graphs, etc.

**Analysis Criteria:** Consists of the columns, filters, and selection steps that users specify for an analysis.

**Analysis Prompt:** A prompt that is added to an analysis. When the user selects a prompt value, that value then determines the content that displays in the analysis.

**Attribute:** The details of a dimension in a central location in which data is stored and managed. Attributes usually appear as columns of a dimension table.

**Bookmark Link:** Captures the path to a dashboard page and all aspects of the page.

**Business Owner:** The person responsible for managing and improving the business value and performance of a KPI or scorecard object, such as an objective, cause, and effect map.



**Catalog:** Folder-based organization system that provides access to personal and shared folders, including the Common Report Library, Agency Folders, and Public Folders.

**Currency Prompt:** A prompt that enables the user to change the currency type that displays in the currency columns on an analysis or dashboard.

**Dashboard:** An object that provides personalized views of corporate and external information. A dashboard consists of one or more analysis that answer several business questions across a common theme. Pages can display anything the user can access or open with a web browser, such as results of analysis, images, and alerts from agents.

**Dashboard Prompt:** A prompt that is added to the dashboard. When the user selects a prompt value, that value then determines the content that displays in all analysis that are included on the dashboard.

**Dimension:** A hierarchical organization of logical columns (attributes). One or more logical dimension tables might be associated with at most one dimension. A dimension might contain one or more (unnamed) hierarchies. There are two types of logical dimensions: dimensions with level-based hierarchies (structure hierarchies), and dimensions with parent-child hierarchies (value hierarchies). A particular type of level-based dimension, called a time dimension, provides special functionality for modeling time series data.

**Dimension Table:** A logical table that contains columns used by a particular dimension. A dimension table cannot be a fact table.

**Fact Table:** A logical table in the business model and mapping layer that contains measures and has complex join relationships with dimension tables.

**Filter:** Criteria that are applied to attribute and measure columns to limit the results that are displayed when an analysis is run. For measure columns, filters are applied before the query is aggregated and affect the query and thus the resulting values. There are two types of filters.

- Inline Filter
- Named Filter

**Hierarchical Column:** A column that holds data values that are organized using both named levels and parent-child relationships.

**Hierarchy:** A system of levels in a logical dimension that are related to each other by one-to-many relationships. All hierarchies must have a common leaf and a common root (all) level.

**Hierarchy Level:** An object within a hierarchical column that either rolls up or is rolled up from other levels.

**Home Page:** A page divided into sections that enables the user to quickly begin specific tasks, locate an object, or access technical documentation.



**Image Prompt:** A prompt that provides an image with different areas mapped to specific values. The user selects an image area to select the prompt value that populates the analysis or dashboard.

**Key Performance Indicator (KPI):** A measurement that defines and tracks specific business goals and strategic objectives. KPIs often roll up into larger organizational strategies that require monitoring, improvement, and evaluation. KPIs have measurable values that usually vary with time, have targets to determine a score and performance status, include dimensions to allow for more precise analysis, and can be compared over time for trending purposes and to identify performance patterns.

**Measure Column:** A column that can change for each record and can be added up or aggregated. Typical measures are sales dollars and quantity ordered. Measures are calculated from data sources at query time.

**Object Properties:** Information about an object and attributes that the owner can assign to an object.

**Objective:** A required or desired outcome in a scorecard that forms a corporate strategy.

**Oracle Business Intelligence Enterprise Edition (OBIEE):** A unique platform that enables customers to uncover new insights and make faster, more informed business decisions by offering agile visual analytics and self-service discovery together with best-in-class enterprise analytics.

**Outer Edge:** Parts of a trellis view that border the inner graphs. These include the column, row headers, and section headers.

**Parent-Child Hierarchy:** A hierarchy of members that all have the same type. All the dimension members of a parent-child hierarchy occur in a single data source. In a parent-child hierarchy, the inter-member relationships are parent-child relationships between dimension members.

**Parent-Child Relationship Table:** A table with values that explicitly define the inter-member relationships in a parent-child hierarchy. Also called a closure table.

**Permissions:** Specify which users can access an object and limit how users can interact with an object.

**Primary Key:** A column (or set of columns) where each value is unique and identifies a single row of a table.

**Prompt:** A type of filter that enables the content designer to build and specify data values or the end user to choose specific data values to provide a result set for an individual analysis or multiple analyses included on a dashboard or dashboard page. A prompt expands or refines existing dashboard and analysis filters.



**Prompted Link:** Captures the path to a dashboard page and a simplified presentation of the dashboard prompt.

**Query:** Contains the underlying SQL statements that are issued to the server.

**Query Cache:** A facility to store query results for use by other queries.

**Report:** The response returned to the user from the execution of a query created. Reports can be formatted, presented on a dashboard page, saved in the Catalog, and shared with other users.

**Repository:** A central location in which data is stored and managed.

**Result:** The output returned from an analysis.

**Structured Query Language (SQL):** A standard programming language for querying and modifying data.


**Subject Area:** An object in the presentation layer that organizes and presents data about a business mode. It is the highest-level object in the presentation layer and represents the view of the data that users see in presentation services.

**Transformation:** Work that is performed on data when moving from a database to another location (sometimes another database). Some transformations are typically performed on data when it is moved from a transaction system to a data warehouse system.

**Variable Prompt:** Enables the user to select a value specified in the variable prompt to display on the dashboard. A variable prompt is not dependent upon column data, but enables you to manipulate, for example add or multiply, the column data on an analysis.

## Types of Data Elements

Insight users will interact with three different types of data elements when building and editing reports. The three different types of data elements in Insight are represented by unique icons.

Type	Description	Example	Icon
Measure	Represents numeric data values that can change based on the scenario and can be aggregated. Measure columns offer the advanced feature allowing users to take advantage of Insight's analytical capabilities.	Employee Count	



Type	Description	Example	Icon
Hierarchy	<p>Represents related values that allow a user to drill down into more detailed levels of the data.</p> <ul style="list-style-type: none"> <li>• When users create a new report with a hierarchy data element, the report will yield a pivot table.</li> <li>• Only one hierarchy can be used within a single report.</li> <li>• Hierarchies should not be used as prompts.</li> </ul>	Location	
Attribute	<p>Represents the largest set of data within Insight. There are three types of attribute data, including:</p> <ul style="list-style-type: none"> <li>• <b>Time:</b> Represents various dimensions of time.</li> <li>• <b>Source System:</b> Represents data pulled from the Mainframe.</li> <li>• <b>Insight:</b> Represents data created specifically for Insight not previously housed in other data sources.</li> </ul>	<p>Time: PAY_PERIOD_NUMBE R</p> <p>Source System: OCC_SERIES_CODE</p> <p>Insight: Professional, Administrative, Technical, Clerical, and Other (PATCO)_CODE_DESC R</p>	



## Data Dictionary

The Data Dictionary outlines the data available within Insight. For the current version of the Data Dictionary, go to the Insight website located on the NFC Home Page, [https://www.nfc.usda.gov/ClientServices/HR\\_Payroll/Initiatives/Insight/Resource\\_Materials.php](https://www.nfc.usda.gov/ClientServices/HR_Payroll/Initiatives/Insight/Resource_Materials.php)

Subject Area	Folder	Data Element	Data Type	Size	COBOL / EmpowHR	FOCUS Name	ALIAS	IDMS Record Name	Description	Source (system)	Update Frequency in
PACS Above Earnings	Employee	PAY_PLAN	CHAR	2	PAY-PLAN	PAY_PLAN	P011050C0021	PAY-HIST	The Plan Applicable To The Employee: Gs = Classification Act Of 1949, As Amended Gg = Grades Similar To General Schedule Gh = Gg Employee Under Merit Pay Gm = Merit Pay System Ed = Experts - 5 Usc 3109 Ee = Experts - Other Ef = Consultant - 5 Usc 3109 Eg = Consultant - Other Eh = Advisory Committee Member - 5 Usc 3109 Ei = Advisory Committee Member - Other Es = Senior Executive Service Ex = Executive Pay Act Fc = Agency For International Development Fe = Senior Foreign Service Fo = Foreign Service Officer Fp = Foreign Service Personnel Sr = Statutory Rates St = Scientific And Technical Ad = Administratively Determined Wg = Nonsupervisory Pay-Schedules - Federal Wage System Wl = Wage Board - Leader Pay Schedules Wm = Wage Board - Maritime Pay Schedules Wp = Wage Board - Printing And Lithographic Pay Schedules Wi = Wage Board - Printing And Lithographic (Washington, D.C. Only) Wd = Wage Board - Production Facilitating Nonsupervisory Wn = Wage Board - Production Facilitating-Supervisory 1 Data Base Elements As Of: 09/08/08 Cobol Element Name Version Picture Focus Name Data Base Definition Ws = Wage Board - Supervisory Pay Schedules Wb = All Other Wage Board Positions Yv = Summer Aid - Sch.4213.3102(V) Yw = Student Aid -	PPS-Pacs	Bi-Weekly
PACS Above Earnings	Employee	PAY_RATE_DET	CHAR	1	PAY-RATE-DETERMINAN	PAY_RATE	P011050C0034	PAY-HIST	Pay Rate Determinant Code Records Whether The Employee Is Receiving A Rate Of Pay Other Than	PPS-Pacs	Bi-Weekly

Figure 20: Data Dictionary

Use the Insight Data Dictionary as a reference to better understand data elements that comprise each Subject Area. Below is an example of how to refer to the Data Dictionary using Insight.

- Subject Areas
  - PACS Above Earnings
- Folder
  - Employee
- Data Element
  - PAY\_PLAN
  - Pay\_RATE\_DET



FileHomeInsertPage LayoutFormulasDataReviewView

Calibri11

**B***I*U**A****A**

ClipboardFontAlignmentNumberStylesCellsEditing

General

\$ % , .00 .00

Conditional FormattingFormat as TableCell Styles

InsertDeleteFormat

Sort & Find & FilterSelect

A3

National Finance Center - Insight Data Dictionary

National Finance Center - Insight Data Dictionary											
PPS Mapping									Description	Source (system)	Update Frequency in
Subject Area	Folder	Data Element	Data Type	Size	COBOL / EmpowHR	FOCUS Name	ALIAS	IDMS Record Name	Description	Source (system)	Update Frequency in
PACS Above Earnings	Employee	PAY_PLAN	CHAR	2	PAY-PLAN	PAY_PLAN	P011050C0021	PAY-HIST	The Plan Applicable To The Employee: Gs = Classification Act Of 1949, As Amended Gg = Grades Similar To General Schedule Gh = Gg Employee Under Merit Pay Gm = Merit Pay System Ed = Experts - 5 Usc 3109 Ee = Experts - Other Ef = Consultant - 5 Usc 3109 Eg = Consultant - Other Eh = Advisory Committee Member - 5 Usc 3109 Ei = Advisory Committee Member - Other Es = Senior Executive Service Ex = Executive Pay Act Fc = Agency For International Development Fe = Senior Foreign Service Fo = Foreign Service Officer Fp = Foreign Service Personnel Sr = Statutory Rates St = Scientific And Technical Ad = Administratively Determined Wg = Nonsupervisory Pay-Schedules - Federal Wage System Wl = Wage Board - Leader Pay Schedules Wm = Wage Board - Maritime Pay Schedules Wp = Wage Board - Printing And Lithographic Pay Schedules Wt = Wage Board - Printing And Lithographic (Washington, D.C. Only) Wd = Wage Board - Production Facilitating Nonsupervisory Wn = Wage Board - Production Facilitating-Supervisory I Data Base Elements As Of: 09/08/08 Cobol Element Name Version Picture Focus Name Data Base Definition Ws = Wage Board - Supervisory Pay Schedules Wb = All Other Wage Board Positions Yv = Summer Aid - Sch A213.3102(V) Yw = Student Aid -	PPS-Pacs	Bi-Weekly
PACS Above Earnings	Employee	PAY_RATE_DET	CHAR	1	PAY-RATE-DETERMINAN	PAY_RATE	P011005C0034	PAY-HIST	Pay Rate Determinant Code Records Whether The Employee Is Receiving A Rate Of Pay Other Than	PPS-Pacs	Bi-Weekly

Ready

Dictionary Sheet1

Count: 3763380%

Figure 21: Data Elements that Comprise Each Subject Area

- Payroll/Personnel System (PPS) Mapping
  - COBOL/EmpowHR Data
    - PAY-PLAN
    - PAY-RATE-DETERMINANT
  - FOCUS Name
    - PAY\_PLAN
    - PAY\_RATE
  - ALIAS
    - P011050C0021
    - P011005C0034
  -





Subject Area	Folder	Data Element	Data Type	Size	COBOL / EmpowHR	FOCUS Name	ALIAS	IDMS Record Name	Description	Source (system)	Update Frequency in
PACS Above Earnings	Employee	PAY_PLAN	CHAR	2	PAY-PLAN	PAY_PLAN	P011050C0021	PAY-HIST	The Plan Applicable To The Employee: Gs = Classification Act Of 1949, As Amended Gg = Grades Similar To General Schedule Gh = Gg Employee Under Merit Pay Gm = Merit Pay System Ed = Experts - 5 Usc 3109 Ee = Experts - Other Ef = Consultant - 5 Usc 3109 Eg = Consultant - Other Eh = Advisory Committee Member - 5 Usc 3109 Ei = Advisory Committee Member - Other Es = Senior Executive Service Ex = Executive Pay Act Fc = Agency For International Development Fe = Senior Foreign Service Fo = Foreign Service Officer Fp = Foreign Service Personnel Sr = Statutory Rates St = Scientific And Technical Ad = Administratively Determined Wg = Nonsupervisory Pay-Schedules - Federal Wage System Wl = Wage Board - Leader Pay Schedules Wm = Wage Board - Maritime Pay Schedules Wp = Wage Board - Printing And Lithographic Pay Schedules Wi = Wage Board - Printing And Lithographic (Washington, D.C. Only) Wd = Wage Board - Production Facilitating Nonsupervisory Wn = Wage Board - Production Facilitating-Supervisory 1 Data Base Elements As Of: 09/08/08 Cobol Element Name Version Picture Focus Name Data Base Definition Ws = Wage Board - Supervisory Pay Schedules Wb = All Other Wage Board Positions Yv = Summer Aid - Sch A213.3102(V) Yw = Student Aid -	PPS-Pacs	Bi-Weekly
PACS Above Earnings	Employee	PAY_RATE_DET	CHAR	1	PAY-RATE- DETERMINAN	PAY_RATE	P011005C0034	PAY-HIST	Pay Rate Determinant Code Records Whether The Employee Is Receiving A Rate Of Pay Other Than	PPS-Pacs	Bi-Weekly

Figure 22: PPS Mapping

- Description - Defines each data element
  - Source (system)
    - PPS-Pacs
  - Update Frequency In
    - List updates - Daily, Weekly, or Biweekly





National Finance Center - Insight Data Dictionary									
Subject Area	Folder	Data Element	Data Type	Size	COBOL / EmpowHR	FOCUS Name	ALIAS	IDMS Record Name	Description
PACS Above Earnings	Employee	PAY_PLAN	CHAR	2	PAY-PLAN	PAY_PLAN	P011050C0021	PAY-HIST	The Plan Applicable To The Employee: Gs = Classification Act Of 1949, As Amended Gg = Grades Similar To General Schedule Gh = Gg Employee Under Merit Pay Gm = Merit Pay System Ed = Experts - 5 Usc 3109 Ee = Experts - Other Ef = Consultant - 5 Usc 3109 Eg = Consultant - Other Eh = Advisory Committee Member - 5 Usc 3109 Ei = Advisory Committee Member - Other Es = Senior Executive Service Ex = Executive Pay Act Fc = Agency For International Development Fe = Senior Foreign Service Fo = Foreign Service Officer Fp = Foreign Service Personnel Sr = Statutory Rates St = Scientific And Technical Ad = Administratively Determined Wg = Nonsupervisory Pay-Schedules - Federal Wage System Wl = Wage Board - Leader Pay Schedules Wm = Wage Board - Maritime Pay Schedules Wp = Wage Board - Printing And Lithographic Pay Schedules Wl = Wage Board - Printing And Lithographic (Washington, D.C. Only) Wd = Wage Board - Production Facilitating Nonsupervisory Wn = Wage Board - Production Facilitating Supervisory 1 Data Base Elements As Of: 09/08/08 Cobol Element Name Version Picture Focus Name Data Base Definition Ws = Wage Board - Supervisory Pay Schedules Wb = All Other Wage Board Positions Yv = Summer Aid - Sch.A213.3102(V) Yw = Student Aid -
PACS Above Earnings	Employee	PAY_RATE_DET	CHAR	1	PAY-RATE-DETERMINAN	PAY_RATE	P011005C0034	PAY-HIST	Pay Rate Determinant Code Records Whether The Employee Is Receiving A Rate Of Pay Other Than

Figure 23: Data Source and Update Frequency in Insight

### To Access the Data Dictionary Directly from Insight:

1. Navigate to the **Shared Folders**.
2. Select **Data Dictionary**.

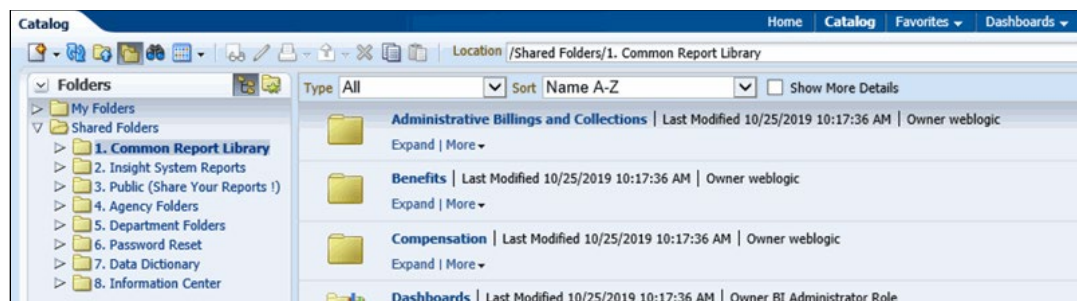


Figure 24: Shared Folders, Option 7 Data Dictionary

3. Select **Execute** to retrieve search options.



Figure 25: Select Execute

4. Use the drop-down menu to select choices.

Use '%' as wildcard for text fields

* Subject Area	Workforce Profile
Folder	Employee Profile
Data Element	(All Column Values)
Data Type	(All Column Values)
Size	(All Column Values)
COBOL/EmpowHR	(All Column Values)
FOCUS Name	(All Column Values)
FOCUS Alias	(All Column Values)
IDMS Record	(All Column Values)
Source	(All Column Values)
Update Freq.	(All Column Values)
Description	

Apply Reset

Figure 26: Data Dictionary Drop-down Menu

5. Select **Apply**.



Subject Area Search    Data Element Search    FOCUS Search						
Use '*' as wildcard for text fields						
* Subject Area	Workforce Profile					
Folder	Employee Profile					
Data Element	(All Column Values)					
Data Type	(All Column Values)					
Size	(All Column Values)					
COBOL/EmpowHR	(All Column Values)					
FOCUS Name	(All Column Values)					
FOCUS Alias	(All Column Values)					
IDMS Record	(All Column Values)					
Source	(All Column Values)					
Update Freq	(All Column Values)					
Description						
Apply    Reset						
Subject Area	Folder	Data Element	Data Type	Size	Cobol/EmpowHR	FOCUS Name
Workforce Profile	Employee Profile	ACCESSION_1ST_AUTH_CODE	VARCHAR2	3	ACCESSION-1ST-AUTH-CODE	ACC_1_ATH_CD
Workforce Profile	Employee Profile	ACCESSION_2ND_AUTH_CODE	VARCHAR2	3	ACCESSION-2ND-AUTH-CODE	ACC_2_ATH_CD
Workforce Profile	Employee Profile	ACCESSION_AUTHORITY	VARCHAR2	20	ACCESSION-AUTHORITY	ACC_AUTHORITY
Workforce Profile	Employee Profile	ACCESSION_METHOD	NUMBER	2	ACCESSION-METHOD	ACC_METHOD
Workforce Profile	Employee Profile	ACCESSION_NAT_OF_ACTN_CODE	VARCHAR2	3	ACCESSION-NAT-OF-ACTN-CODE	ACC_NAT_ACT
Workforce Profile	Employee Profile	ACCESSION_PAY_PERIOD	CHAR	2	ACCESSION-PAY-PERIOD	ACC_PAY_PD
Workforce Profile	Employee Profile	ACCESSION_YEAR	VARCHAR2	4	ACCESSION-YEAR	ACCESSION_YR
Workforce Profile	Employee Profile	ALTERNATE_WORK_SCHEDULE	CHAR	1	ALTERNATE-WORK-SCHEDULE	ALT_WK_SCH
Workforce Profile	Employee Profile	ALTERNATE_WORK_SCHEDULE_DESCR	VARCHAR2	50	N/A	N/A
Workforce Profile	Employee Profile	ANNUITANT_INDICATOR	CHAR	1	ANNUITANT-INDICATOR	ANNUIT_IND

Figure 27: Data Dictionary Search Results

## Data Refresh Report

Insight includes a Data Refresh Report that users can access to validate the last date data was updated in the warehouse.

The Data Refresh Report is located at **Catalog > Shared Folders > Insight System Reports** folder.

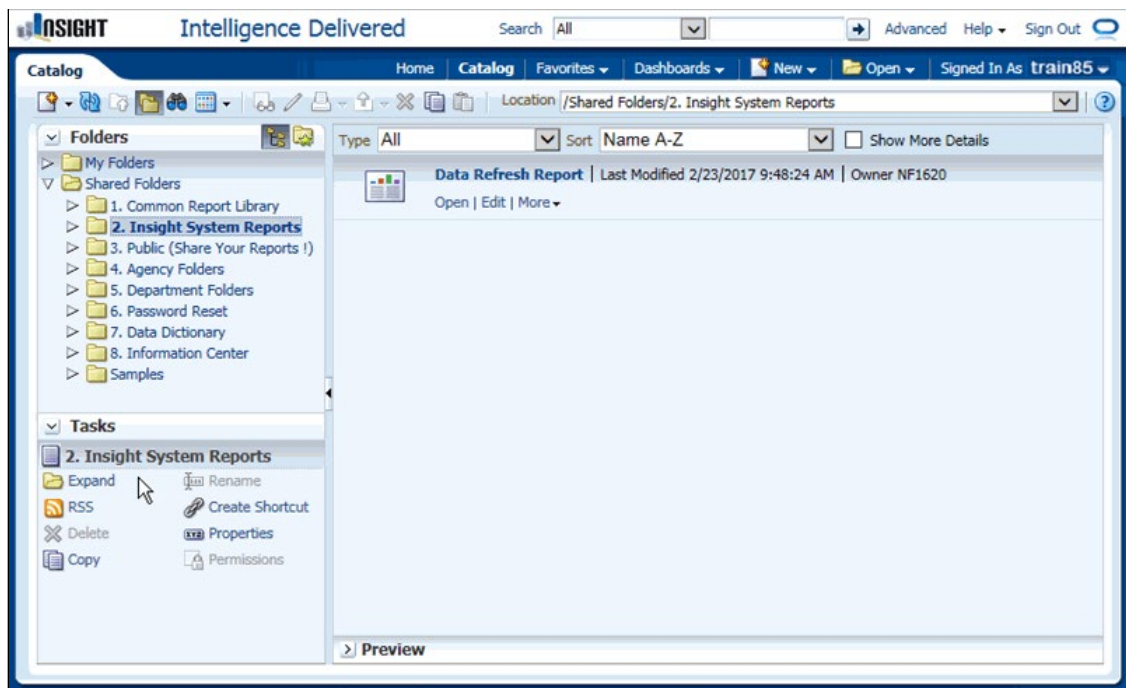


Figure 28: Insight System Reports Folder



The report is structured by subject areas.

Subject Area	Load Frequency	Last Loaded (Central Time)	Data as of:
ABCO	DAILY	5/17/2021 6:27:16 AM	14-MAY-21
PMSO	DAILY	5/15/2021 10:00:36 AM	15-MAY-21
Payroll Accounting	BIWEEKLY	5/16/2021 1:10:07 PM	2021-09
Personnel History	BIWEEKLY	5/16/2021 9:43:48 AM	2021-09
Workforce Profile	BIWEEKLY	5/15/2021 11:55:26 PM	2021-09
	DAILY	5/15/2021 9:07:53 AM	14-MAY-21
webTA 3.8	BIWEEKLY	5/16/2021 7:21:30 PM	2021-09

[Edit](#) - [Refresh](#) - [Print](#) - [Export](#) - [Copy](#)

Figure 29: Data Refresh Report Tab

Note: The Last Loaded date and time stamp are Central Time.

## Data Loading Cycle

Insight data updates align with traditional NFC Personnel Input and Edit System (PINE), Administrative Billings and Collections System (ABCO), and Biweekly Examination Analysis and Reporting (BEAR) updates.

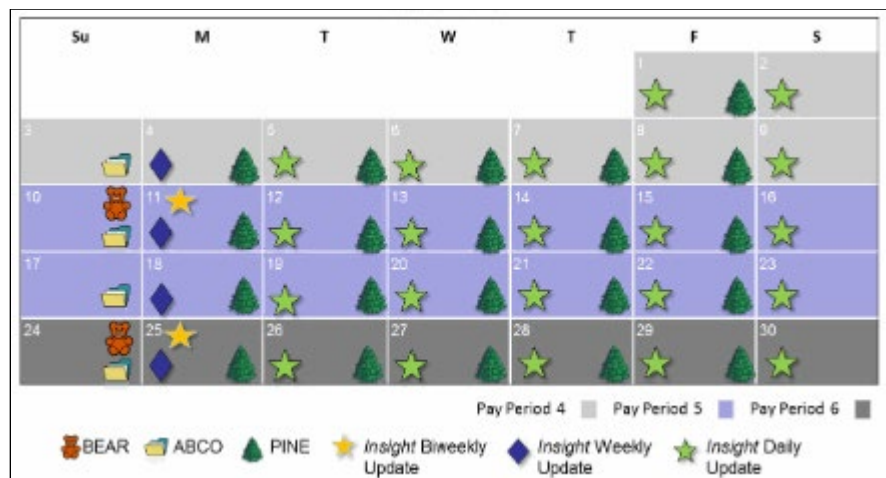


Figure 30: Insight Data Loading Calendar

Insight data is loaded daily, weekly, and biweekly:

- Daily Updates: Insight updates data after PINE runs daily.
- Weekly Updates: Insight updates data after ABCO loads weekly.



- Biweekly Updates: Insight updates data after BEAR loads biweekly.

## Components in Insight

Items in Insight are divided into various components.

**Folders pane**—Displays the catalog as a directory hierarchy or displays only those folders and objects that are created or that are marked as favorites.

**Search pane**—Provides search criteria and initiates a catalog search.

**Catalog area**—Displays the results of a search, displays folders to browse content and tasks specific to an object.

**Tasks pane**—Displays tasks specific to an object.

**Preview pane**—Previews the object that is selected in the Catalog area. This pane is not visible until the display button is selected.

**Catalog toolbar**—Display the icons that are enabled on the toolbar and vary between object types.

The Catalog toolbar contains the following icons:

- **User View** - Defaults to User View. User can select Admin View if they have administrative permissions. Admin View enables users to perform all administrative tasks and access the catalog root folders which provide detailed information about all users and system objects.
- **New** - Used to create new objects. After the user selects the object to create, the object's editor displays the location to begin building the object.

---

Note: If you have administrative permissions, then the New menu displays the Folder link that you can select to create a catalog folder.

---



- **Refresh** - Used to update the catalog with content or folder changes.



- **Up** - Used to navigate to a parent folder or directory.











- **Show/Hide folders panes** - Used to hide or display the Folders pane and Tasks pane.



- **Search** - Used to display the Search pane. Deselect this button to display the Folders pane.



-  **Change list view type** - Use this list to select how much information about folders and objects to display in the Catalog area.
  - **Descriptive** - Select to display the object or folder's name, type, owner, and date modified and Expand, Open, Edit, and More links. This view enables you to perform tasks directly from the object's listing.
  - **Details** - Select to display the object or folder's name, type, owner, and date modified.
  - **List** - Select to display object and folder name only.
-  **Open**- Used to view the selected object. For example, if you select a report and select the View button, the report viewer launches and shows the report.
-  **Edit** - Used to modify a selected object using the associated editor or run a script, URL, or web service action.
-  **Print** - Used to print the current dashboard page, analysis, or the information in the Preview pane.
-  **Export** - Used to export a copy of an object or the object's data to a variety of formats (for example, PDF, or spreadsheet).
-  **Delete** - Use to remove a selected object or folder from the catalog.
-  **Copy** - Used to copy a selected object or folder to paste in another directory.
-  **Paste** - Used to paste a copied object or folder to another location.





## Subject Areas

Subject Areas are the broadest category of data organization within Insight and used to logically group related data elements.

- Subject Areas separate data into meaningful groups to make sure the correct data is used in a report to answer a business question.
- Each Subject Area has a distinct set of data and calendar filter requirements for building ad hoc reports.
- Subject Areas are set up to accommodate security profiles, to manage user visibility of data, and to group similar data together into data marts that can be used to tailor the data.

The following Subject Areas are available in Insight:

- Administrative Billings and Collections (ABCO)
- Payroll Accounting System (PACS)
- Personnel History (PERHIS)
- Position Management System Online (PMSO)
- Retirement Data (RETM)
- Time and Attendance (T&A) Data
- Workforce Profile (WFP)

Data for the above listed subject areas is validated against the Table Management System (TMGT) and the Management Accounting Structure Codes System (MASC).

Subject Area	Description of Data	Update Frequency
<b>TMGT</b>	Data can be found in other tables throughout Insight (e.g., TMGT Table 005, Agency Organizational Structure data can be found in Insight's Organization Table).	Daily (varies by Subject Area)
<b>MASC</b>	Accounting codes	Daily







## Common Reports Library

The Common Report Library contains all the pre-designed reports and dashboards in Insight. The Common Report Library contains:

- A collection of frequently used Government-wide standard reports.
- Templates for users to customize based on their Agency-specific requirements.
- A Combination of reports and dashboards.
- Examples of the types of reports users can build in the ad hoc environment.

## Types of Reports

There are two types of reports in the Common Report Library:

- Operational reports: Answers a business question with a simple table or graph and offers the most detailed reports.
- Managerial reports: Provides mid-level data detail with drill-down and historical trend functionality. All managerial reports have action links that a user can select to drill-down to another report.

## Accessing the Common Reports Library

**To Access the Common Reports Library:**

1. Select **Catalog** tab on top navigation bar.
2. Select the **Shared Folders** in the Folders pane. The list of shared folders is displayed.

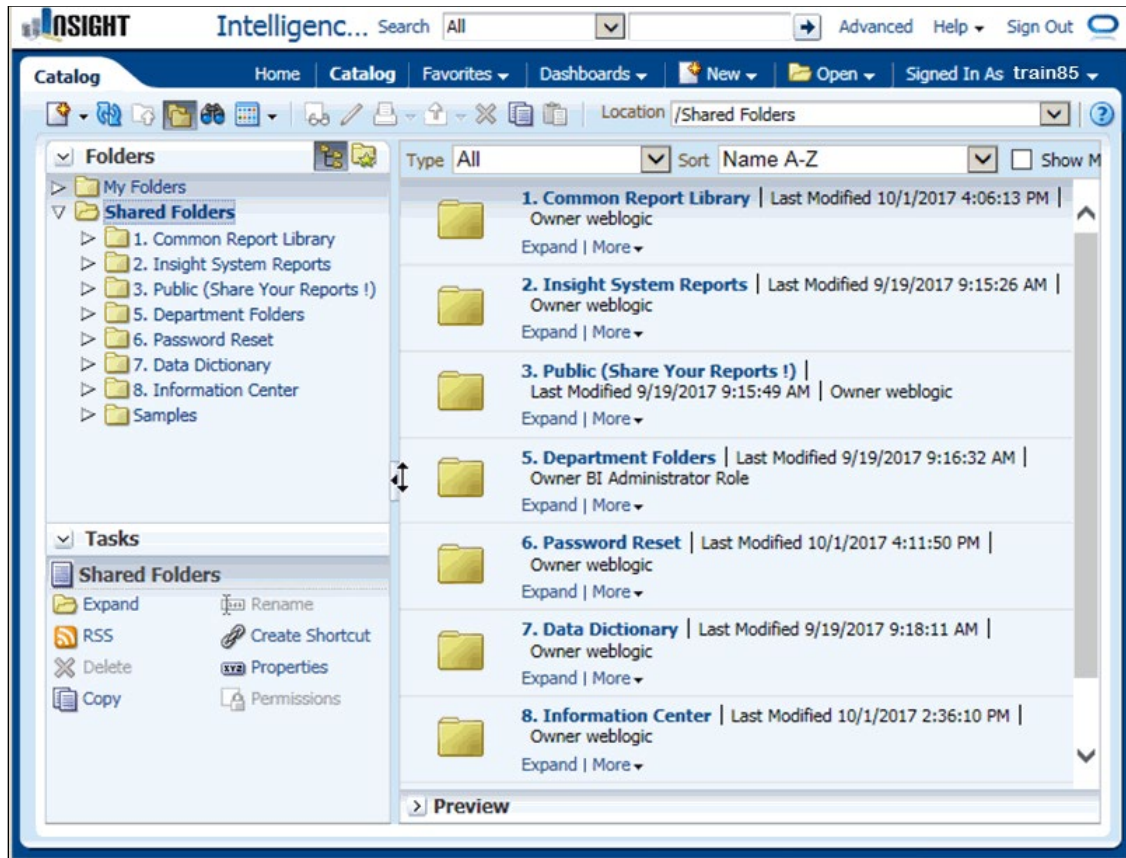


Figure 31: Catalog Page

3. Select the **Common Report Library** structured by a series of folders following OPM's BRM which outlines each function in the HR life cycle.

---

Note: Users with the Insight Author role may create new folders within My Folders and Shared Folders. Insight Authors may control access to new folders created within Agency Folders.

---

4. Scroll down the series of folders in the Common Report Library to select the desired folder in the Folder pane that provides the data requirements.
5. Select the **Expand** action link to open or edit the report.

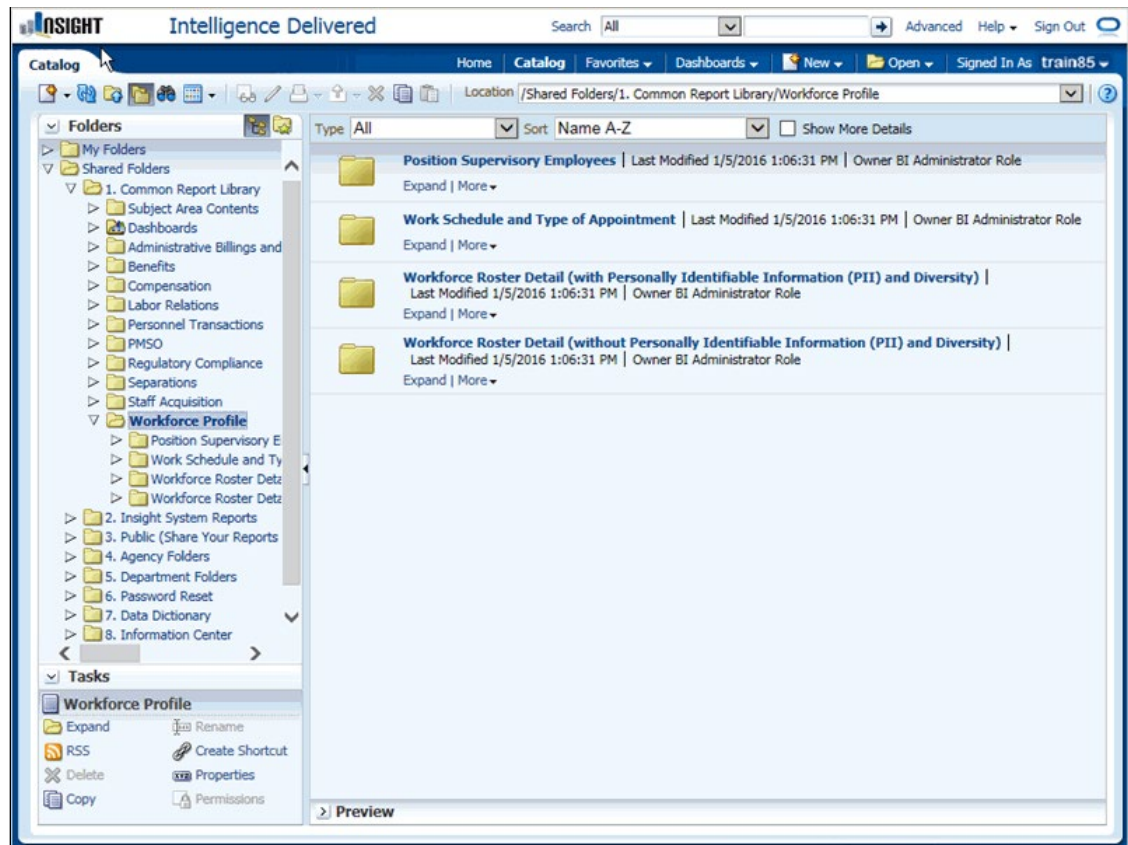


Figure 32: Expand Action Link Under Folder



OR

Select the desired folder that provides the data requirements in the Folder pane. Under the report, select the **Open** action link.

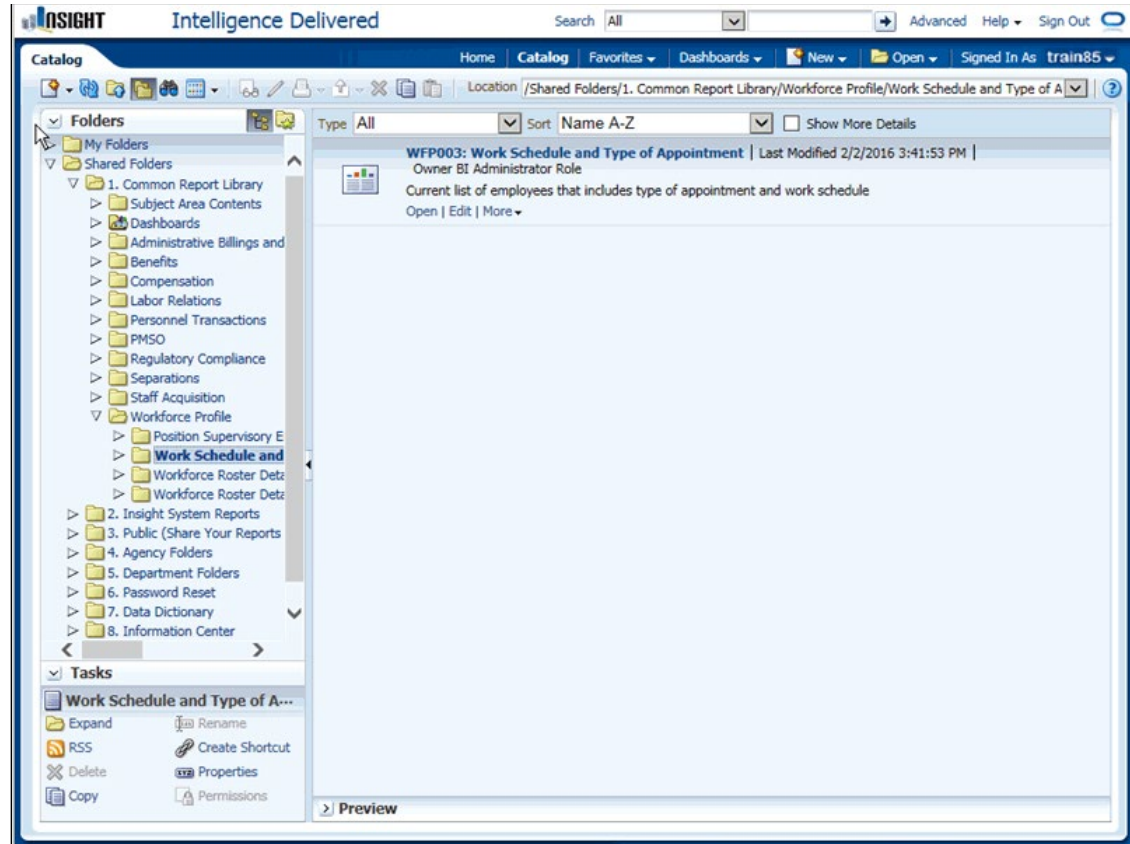


Figure 33: Open Action Link

6. Identify reports and dashboards using the unique icon that precedes the title of each item.

Type	Description	Icon
<b>Report or Analysis</b>	Includes a combination of information that answers a single business question. Reports can include a table, text, graph, etc.	
<b>Dashboard</b>	Presents a snapshot of data findings across multiple reports in a common theme or purpose. Answers several business questions on a similar theme.	



---

Note: When navigating through folders within the Folders pane, you must select the folder name to see the list of folder contents.

---





## Running a Common Report

### To Run a Common Report:

1. Select the **Catalog** action link on top navigation bar to access the **Common Reports Library**.
2. Select the **Shared Folders** in the Folders pane. The list of shared folders is displayed.
3. Select the **Common Report Library** structured by a series of folders following OPM's BRM which outlines each function in the HR life cycle.
4. For more selections, select the **Expand** action link under the desired folder until the user gets to the data requirements.

Note: When navigating through folders in the **Folders** pane, you must select the folder name to see the list of folders content.

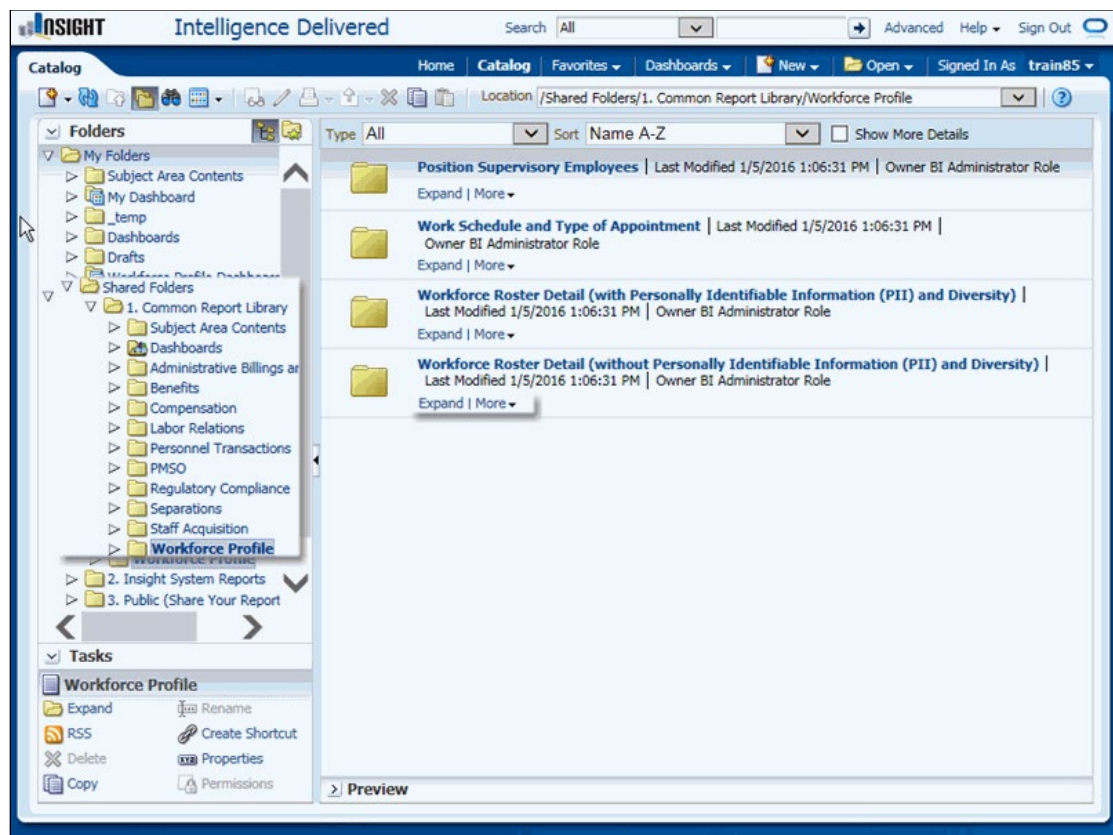


Figure 34: How to Open a Common Report

5. Select the **Open** action link below the desired report.

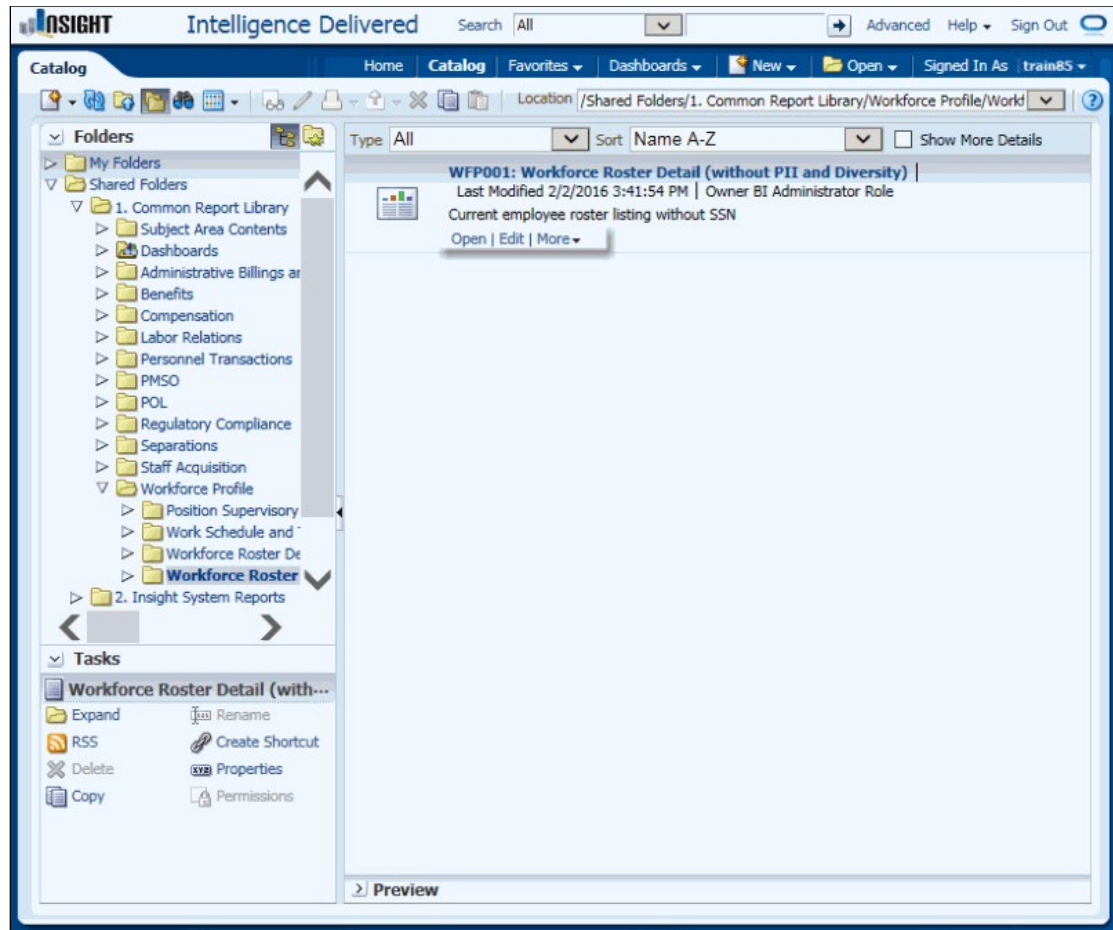


Figure 35: Report Open Action Link





The report prompts are displayed, which allow users to restrict data in a report each time it runs.

**Figure 36: Report Prompts**

6. Select the appropriate report prompts to restrict the report.

Report prompts can be used to restrict the data in a report. Users will interact with two different types of report prompts based on the type of data.

- **Drop-Down:** Select from a list of potential values or type the selection directly into the field.

---

Note: After making selections in a drop-down prompt, click in the white space of the prompts page to accept the selections. This action allows the prompts to cascade correctly, if applicable. Report prompts distinguished by an asterisk (\*) indicate a mandatory field.

---

- **Calendar:** Select the date (month, day, and year) from the calendar view.

---

Note: Reports that use time prompts, such as a pay period and a year, contain historical data. By completing the time prompts, users can restrict data to a certain time range.

---

7. Select **OK** to run the report results. The report name is displayed in the tab at the top left corner of the page. The report table, graph, or other report components populate based on restrictions applied by the report prompts.

**OR**

Select **Reset** to return all report prompts to the default.



The run view displays the report results.

The screenshot shows the 'Run View' of a report titled 'COMP012: Employee Incentives (3Rs)'. The report was run on 7/7/2015 at 10:41:07 AM by user NFE000. It displays a summary table of metrics and a detailed data table below.

**Summary Metrics:**

Metric	Value
Total Number of Employees who Received 3R Incentives Awarded	7
Total Number of 3R Incentives Awarded	7
Total Value of All 3R Incentives Awarded	\$148,215.00
Average Value of All 3R Incentives Awarded	\$21,173.57
Total Number of Recruitment Incentives Awarded	2
Total Value of Recruitment Incentives Awarded	\$7,000.00
Average Value of Recruitment Incentives Awarded	\$3,500.00
Total Number of Relocation Incentives Awarded	2
Total Value of Relocation Incentives Awarded	\$53,676.00
Average Value of Relocation Incentives Awarded	\$26,838.00
Total Number of Retention Incentives Awarded	3
Total Value of Retention Incentives Awarded	\$87,539.00
Average Value of Retention Incentives Awarded	\$29,179.67

\*Note only retention allowance actions with a dollar value of greater than \$0 are included in metrics.

**Data Table:**

Org Structure	POI	Employee Name	Pay Plan	Occ Series	Grade/Step	Position Official Title	Incentive Type (NOA Code)	Legal Authority Code	2nd Legal Authority Code	Recruitment Bonus	Recruitment %	Relocation Bonus	Relocation %	Retention Bonus	Retention %	NOA Effective Date
AG904010000000000000	5317	DOE, JOHN	GS	2210	15/08	IT PROJ MGR	827 - RETENTION INCENTIVE	VPR	-					\$30,860.00	22%	11/4/2012
AG904010000000000000	5317	MOE, CURLEY LARRY	GS	2210	13/10	ITSPEC	827 - RETENTION INCENTIVE	VPR	-					\$19,146.00	18%	7/1/2012
AG907008010010000000	5317	DOE, JANE	GS	0501	14/01	SUPVY FINANCL OFFICR	816 - RELOCATION INCENTIVE	VPO	-			\$38,676.00	0%			10/7/2012

Figure 37: Report Run View

## Rearranging Data with Formulas

To Rearrange Data with Formulas:

1. Navigate to the **Selected Columns** pane in the Criteria tab of the ad hoc report editing page.
2. Select **Edit** for the desired data element and in the drop-down menu.
3. Select **Edit Formula**.

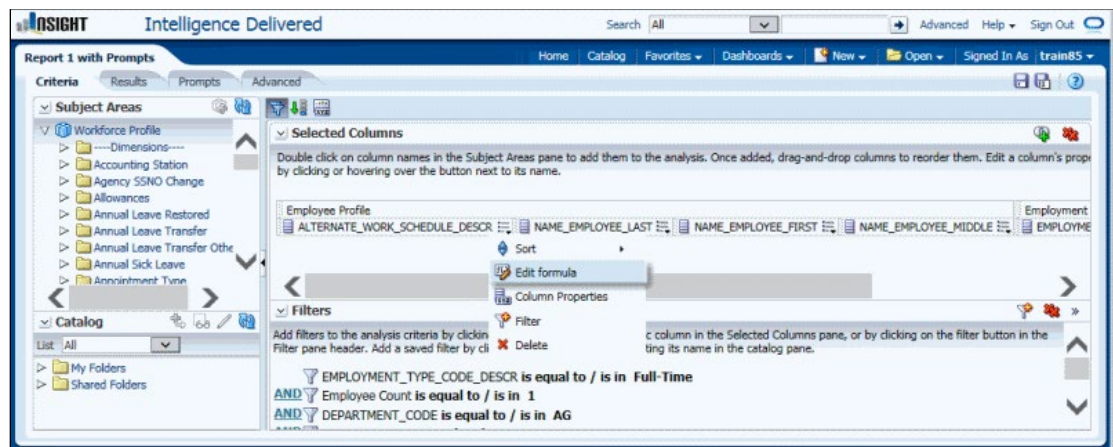


Figure 38: Data Element Edit Format Option

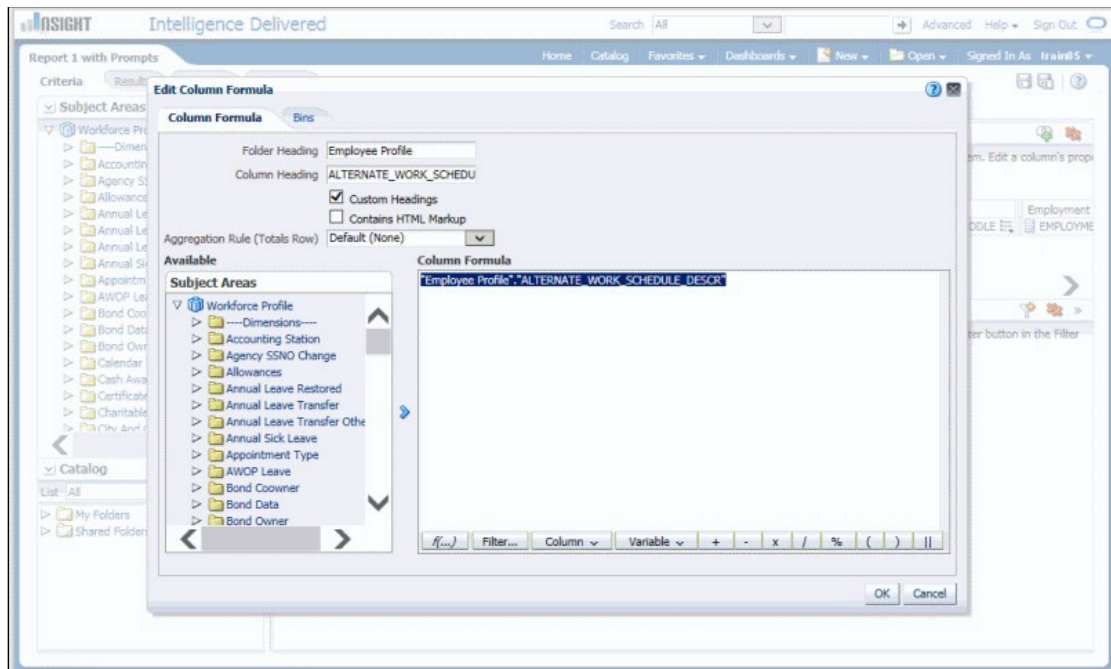


4. View the Edit Column Formula popup to customize the Column Heading and apply formulas to the column values.
5. Select **Custom Headings** checkbox to edit the Folder Heading and Column Heading.

---

Note: Leave the Aggregation Rule set at default.

---



**Figure 39: Custom Headings**

6. Select **Column** to choose from a menu of data elements in the pane to use in the formula.



Note: Mathematical operations available appear below the Column Formula workspace. Make sure the Column Formula is highlighted before selecting the Column menu.

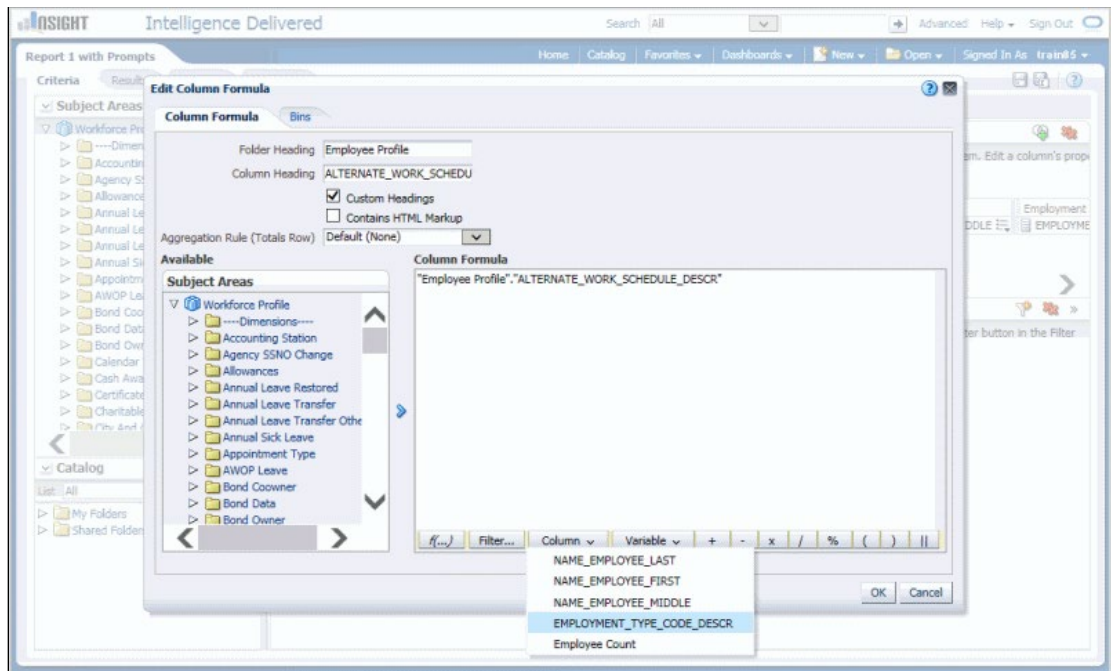


Figure 40: Column Option in the Column Formula

7. Navigate to the **Insert Function** icon.
8. Select the desired function.
9. Select **OK**.

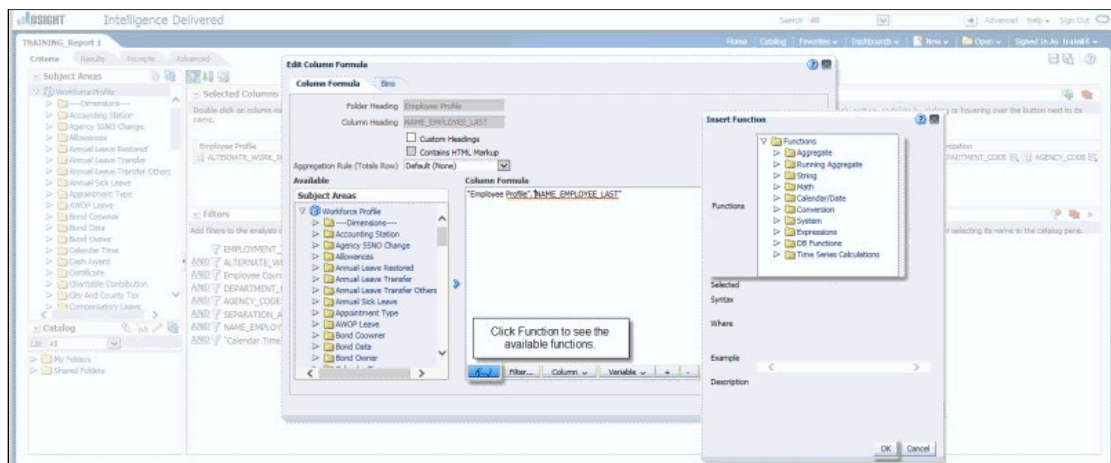


Figure 41: Insert Function Popup



The Desired Function List at the beginning of the formula is displayed in the Column Formula workspace.

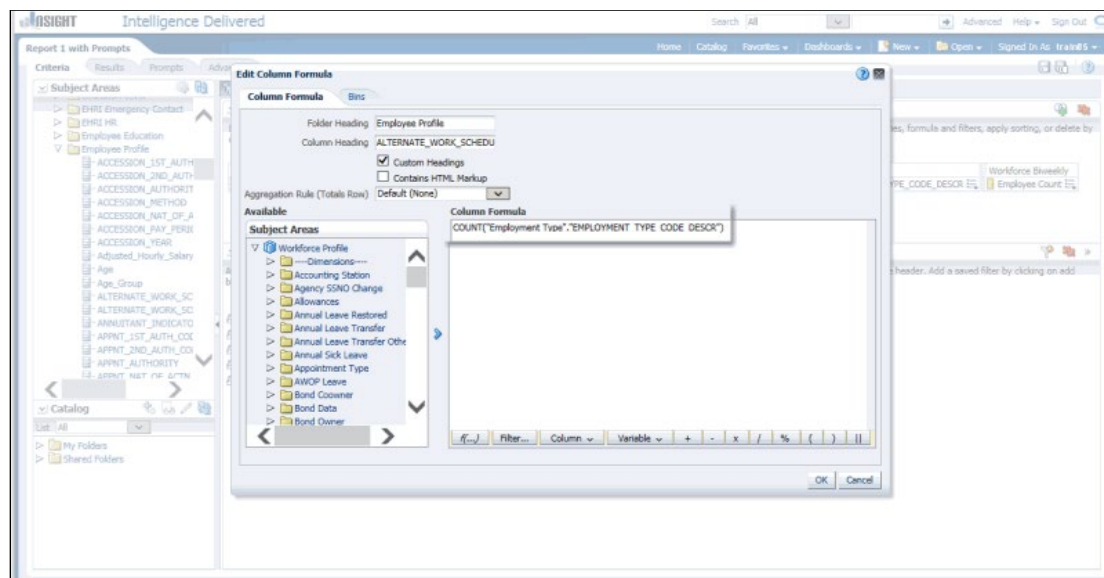


Figure 42: Column Formula Workspace With Desired Function Added

## Adding a Report to Favorites

When navigating through folders in the Folders pane, select the folder name to see the list of contents.

### To Add a Report to Favorites:

1. Select the **More** action link from the Catalog.
2. Select **Add to Favorites**.

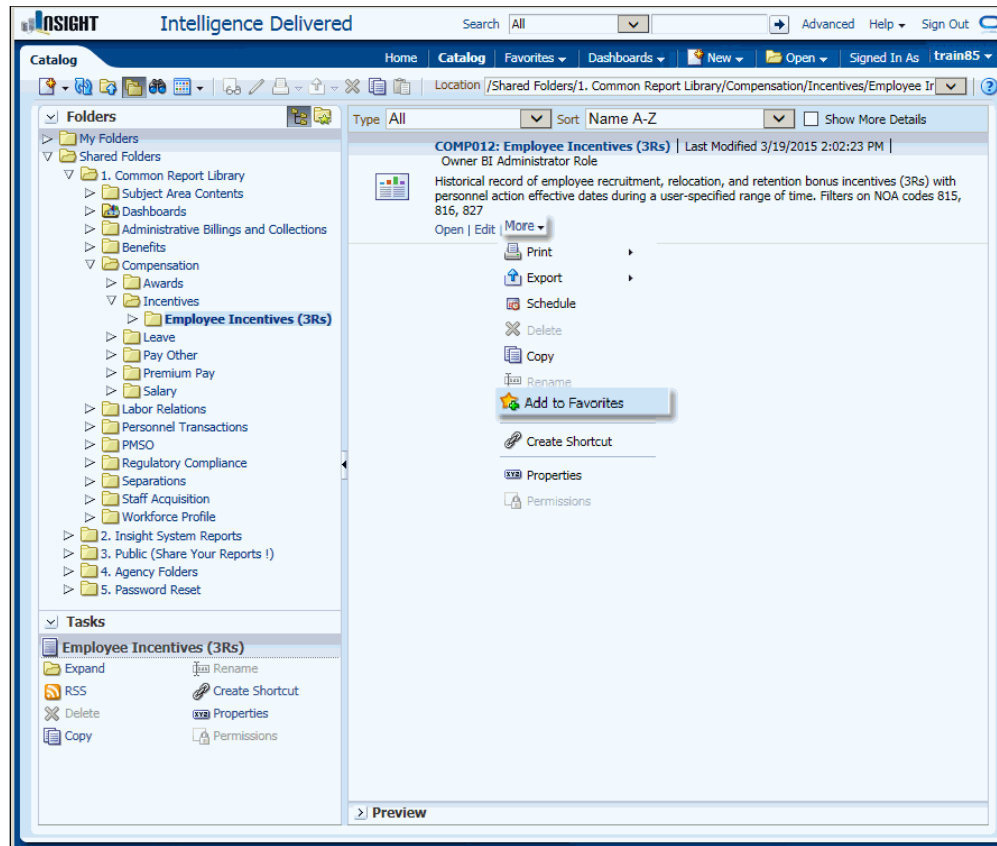
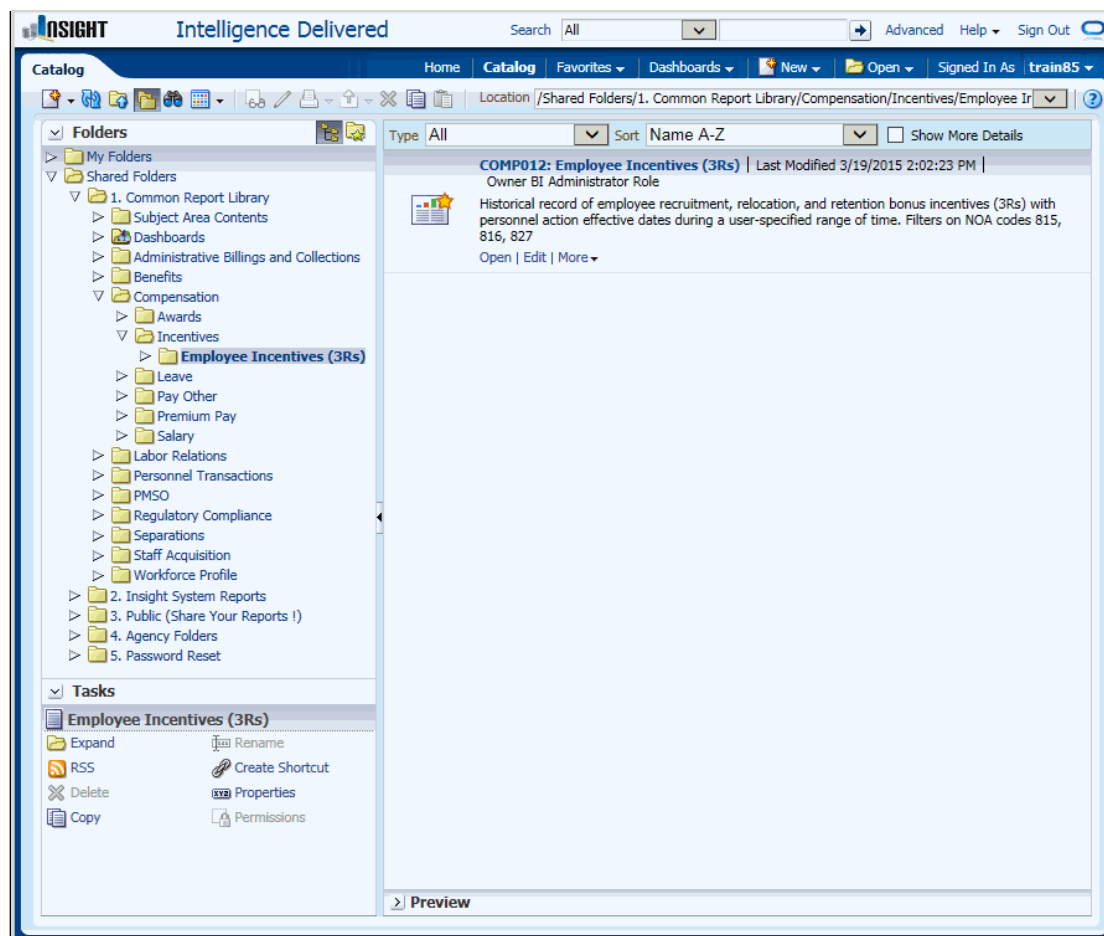


Figure 43: More Drop-Down Menu with Add to Favorites Option



A star will appear on the report icon indicating it is part of the Favorites menu.



**Figure 44: Favorite Indicator on Report**

3. Select the **Favorites** action link to view the list of favorite reports on the navigation bar.



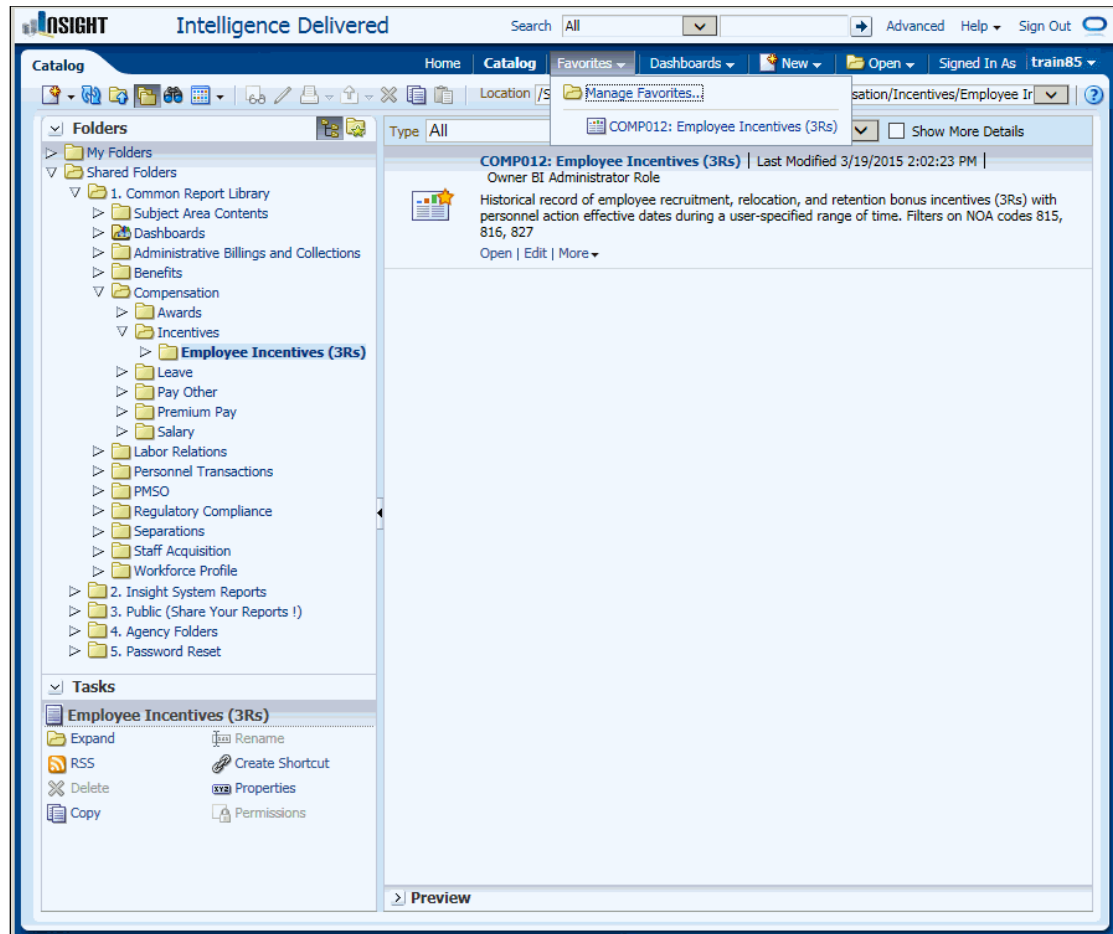


Figure 45: Favorites Action Link With a List of Users Favorites

4. Select the **More** action link.
5. Select **Remove From Favorites** to remove the report from Favorites.



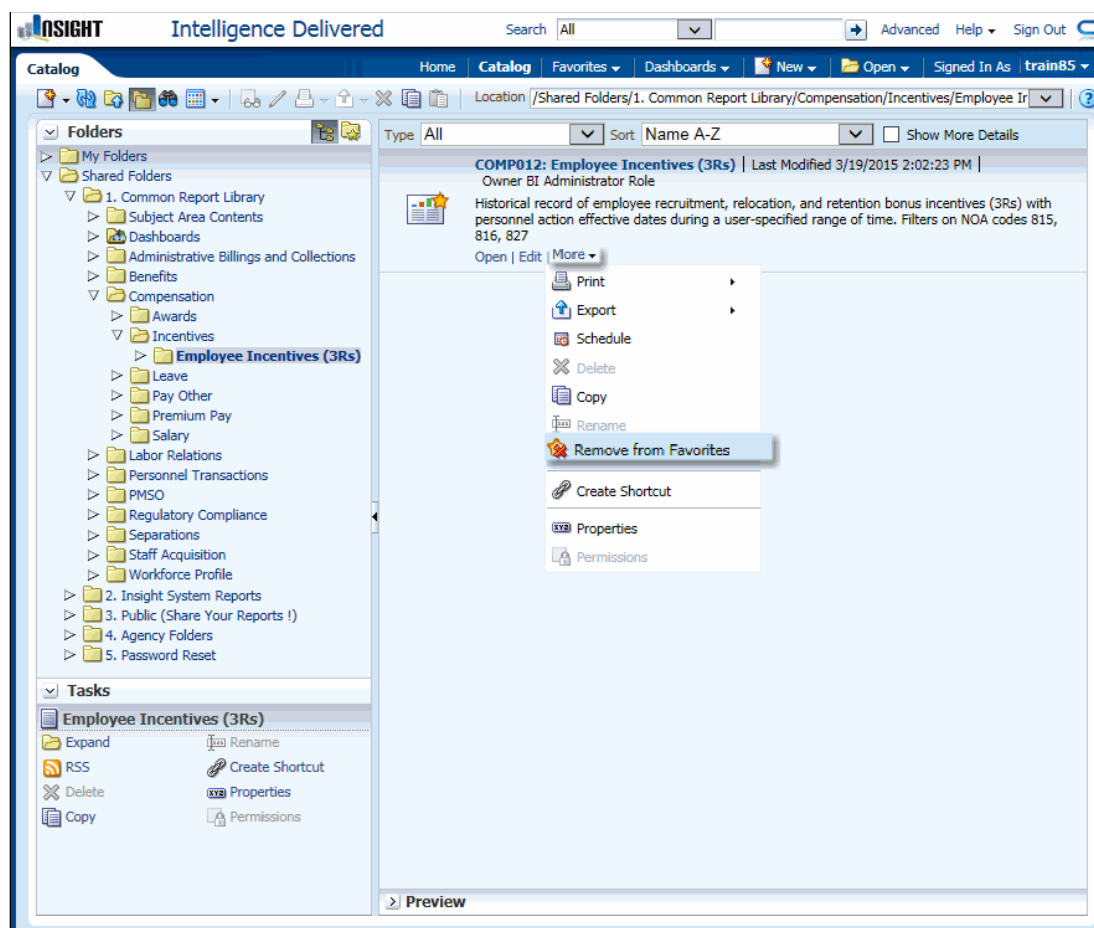


Figure 46: More Action Link Drop-Down Menu (Select Removed from Favorites)

## Catalog Action Links

Action links are located directly below the report or dashboard. The action links are a shortcut to a number of tasks.

Dashboards have multiple components (e.g., reports and prompts). Because of this, when users access dashboards from the Catalog, they will view a folder which can be expanded to see the individual items.



To run the full dashboard, select **Dashboards** folder in the Folder pane and select the **Open** action link for the desired dashboard from the view pane.

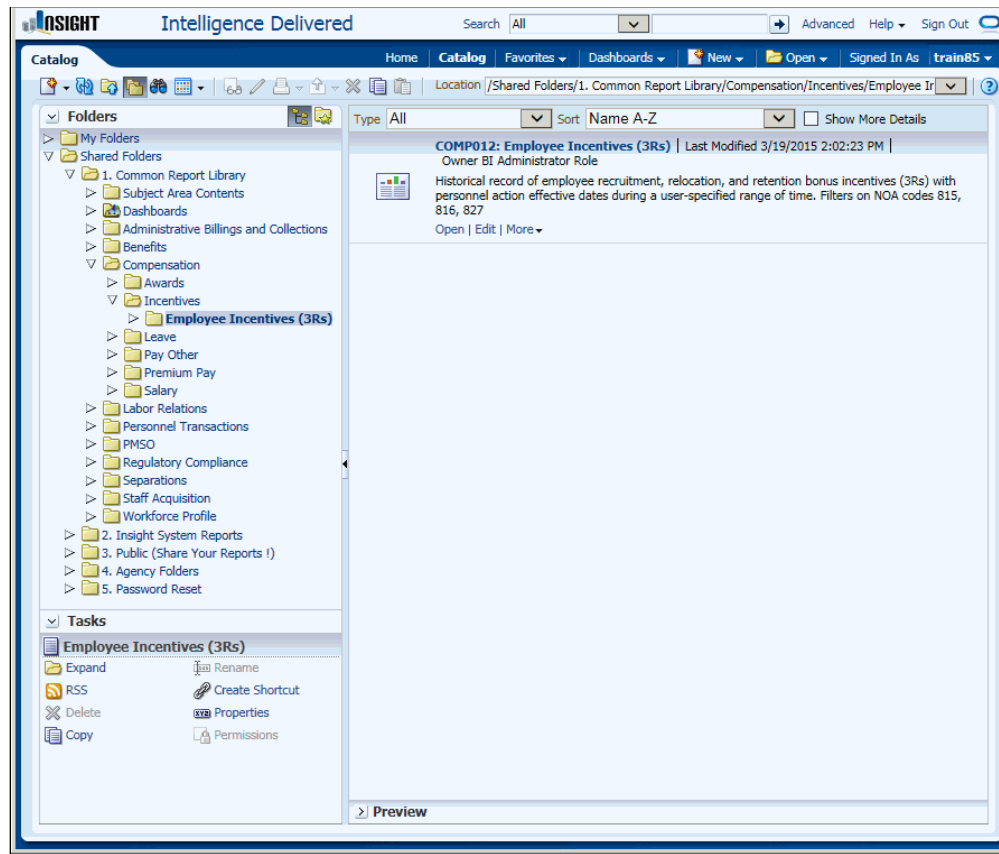


Figure 47: Action Links

#### To Use the Catalog Action Links:

1. To run the full dashboard, select the **Dashboards** folder in the Folder pane.
2. Select the **Open** action link for the desired dashboard from the view pane.

#### Action Links under each Report or Dashboard

The following links are available under each report for dashboard:

Action Links under each Report or Dashboard	Description
<b>Open</b>	Directs users to a new page that runs the report.
<b>Edit</b>	Directs users to the ad hoc report editing page to edit the structure and/or appearance of the report.



Action Links under each Report or Dashboard	Description
<b>More</b>	Provides a list of additional options including Print, Export, Schedule and Add to Favorites, etc.

### Options within the More Action Link

The following options are available within the more action link:

Option	Description
<b>Print</b>	Provides a variety of options to print a report to simplify sharing information. <ul style="list-style-type: none"> <li>Printable PDF</li> <li>Printable HTML.</li> </ul>
<b>Export</b>	Provides a variety of options to export a report to simplify sharing information. <ul style="list-style-type: none"> <li>PDF</li> <li>Excel</li> <li>PowerPoint</li> <li>Web Archive</li> <li>Data</li> </ul>
<b>Schedule</b>	Define the frequency, start, and end time of the agent.
<b>Copy</b>	Provides a copy of a selected object or folder to paste in another directory.
<b>Add to Favorites</b>	Provides a way to add the selected object to your Favorites list. A favorite objects icon appears with a gold star overlay.
<b>Create Shortcut</b>	Provides a way to create a shortcut to the object or folder. <p>Note: When users create a shortcut, Oracle BI EE adds the shortcut to the current folder. Users can then move this shortcut to another location within the catalog.</p>
<b>Properties</b>	To view or modify the selected object's properties. <p>Note: When this option is selected, the Properties dialog displays.</p> <p>Displays a menu of options to format a component of a report or dashboard.</p>



## Running a Report With Prompts

Report prompts will restrict data to custom ranges as a report runs. Report prompts appear on the page preceding a report in the run view, allowing users to manipulate the restriction on the data each time the report runs.

### To Run a Report with Prompts.

1. Complete the mandatory fields in the Report Prompt page to restrict data. The report prompt page is displayed below.

The screenshot shows the 'Employee Incentives (3Rs)' report prompt page. The page has a header with the 'INSIGHT' logo and 'Intelligence Delivered' tagline. Below the header is a navigation bar with links like Home, Catalog, Favorites, Dashboards, New, Open, Signed In As, and train85. The main content area is titled 'Employee Incentives (3Rs)' and contains several sections of dropdown menus for filtering data. Mandatory fields are indicated by an asterisk (\*). The fields include: \* Date of Action (Between), \* Department Code, \* Agency Code, Org Lvl 2, Org Lvl 3, Org Lvl 4, Org Lvl 5, Org Lvl 6, Org Lvl 7, Org Lvl 8, POI, Pay Plan, Occupational Series, Grade, Type of Appointment, Work Schedule, Type of Employment, Incentive Type (NOA Code), Legal Authority, and 2nd Legal Authority. At the bottom right, there are 'OK' and 'Reset' buttons. At the bottom left, there are links for 'Edit', 'Refresh', and 'Copy'.

Figure 48: Prompts Page

Note: All reports in the Common Report Library will have a report prompt page. Report prompts distinguished by an asterisk (\*) indicate mandatory fields; users must make a selection in those fields.

2. Use report prompts to restrict the data within a report. Users will interact with two different types of report prompts based on the type of data, drop down and calendar.
  - **Drop-Down:** Select from a list of potential values or type the selection directly into the values box.



**Employee Incentives (3Rs)**

\* Date of Action  
Between [ ] [ ]

\* Department Code  
--Select Value--

\* Agency Code  
--Select Value--  
85  
90  
91  
92  
93  
94  
95  
96

Org Lvl 2  
--Select Value--

Org Lvl 3  
--Select Value--

Org Lvl 4  
--Select Value--

Org Lvl 5  
--Select Value--

Org Lvl 7  
--Select Value--

Org Lvl 8  
--Select Value--

POI  
--Select Value--

Pay Plan  
--Select Value--

Grade  
--Select Value--

Type of Appointment  
--Select Value--

Type of Employment  
--Select Value--

Incentive Type (NOA Code)  
--Select Value--

Legal Authority  
--Select Value--

2nd Legal Authority  
--Select Value--

OK Reset

Edit - Refresh - Copy

**Figure 49: Agency Code Drop-Down Prompt**

- **Calendar:** Select the date (month, day, and year) from the Calendar View.

**Employee Incentives (3Rs)**

\* Date of Action  
Between [ ] [ ]

\* Department Code  
--Select Value--

Org Lvl 5  
(All Column Values)

Pay Plan  
(All Column Values)

Type of Appointment  
(All Column Values)

Incentive Type (NOA Code)  
(All Column Values)

Legal Authority  
(All Column Values)

2nd Legal Authority  
(All Column Values)

Org Lvl 3  
(All Column Values)

Org Lvl 4  
(All Column Values)

Org Lvl 8  
(All Column Values)

POI  
(All Column Values)

OK Cancel

OK Reset

Edit - Refresh - Copy

**Figure 50: Calendar Prompt**

Note: Some drop-down prompts will cascade based on user selection. For example, as a user selects Department, Agency name will update to only the available Agencies within the selected Department. After making selections in a drop-down prompt, select in the white space of the prompts page to accept the selections. Reports that use time prompts, such as the calendar, contain historical data which allow users to restrict the date range based on prompt selections.



3. Select **OK** to run the report.

**Employee Incentives (3Rs)**

\* Date of Action: Between 01/17/2011 - 01/01/2013

\* Department Code: AG

\* Agency Code: 90

Org Lvl 2: (All Column Values)

Org Lvl 3: (All Column Values)

Org Lvl 4: (All Column Values)

Org Lvl 5: (All Column Values)

Org Lvl 6: (All Column Values)

Org Lvl 7: (All Column Values)

Org Lvl 8: (All Column Values)

POI: (All Column Values)

Pay Plan: (All Column Values)

Occupational Series: (All Column Values)

Grade: (All Column Values)

Type of Appointment: (All Column Values)

Work Schedule: (All Column Values)

Type of Employment: (All Column Values)

Incentive Type (NOA Code): (All Column Values)

Legal Authority: (All Column Values)

2nd Legal Authority: (All Column Values)

OK Reset

Edit - Refresh - Copy

Figure 51: Report Prompt Page with OK Button

Note: Select **Reset** to return all report prompts to the default view.

Displayed below is the report in the run view with the report name. The report table, graph, or other report components are populated based on restrictions applied by the report prompts.

**COMP012: Employee Incentives (3Rs)**

Time run: 7/7/2015 10:41:07 AM

User: NFE000

DATE\_PERS\_ACTN\_EFFECTIVE is between 01/17/2013 and 01/01/2013  
and DEPARTMENT\_CODE is equal to AG  
and AGENCY\_CODE is equal to 90  
and "NOA Code"="NOA\_CODE" IN ('815', '816', '827')

Total Number of Employees who Received 3R Incentives Awarded	7
Total Number of 3R Incentives Awarded	7
Total Value of All 3R Incentives Awarded	\$148,215.00
Average Value of All 3R Incentives Awarded	\$21,173.57
Total Number of Recruitment Incentives Awarded	2
Total Value of Recruitment Incentives Awarded	\$7,000.00
Average Value of Recruitment Incentives Awarded	\$3,500.00
Total Number of Relocation Incentives Awarded	2
Total Value of Relocation Incentives Awarded	\$53,676.00
Average Value of Relocation Incentives Awarded	\$26,838.00
Total Number of Retention Incentives Awarded	3
Total Value of Retention Incentives Awarded	\$87,539.00
Average Value of Retention Incentives Awarded	\$29,179.67

\*Note only retention allowance actions with a dollar value of greater than \$0 are included in metrics.

Org Structure	POI	Employee Name	Pay Plan	Occ Series	Grade/Step	Position Official Title	Incentive Type (NOA Code)	Legal Authority Code	2nd Legal Authority Code	Recruitment Bonus	Recruitment %	Relocation Bonus	Relocation %	Retention Bonus	Retention %	NOA Effective Date
AG90401000000000000000	5317	DOE, JOHN	GS	2210	15/08	IT PRD3 MGR	827 - RETENTION INCENTIVE	VPR	-					\$30,860.00	22%	11/4/2012
AG90401000000000000000	5317	MOE CURLEY LARRY	GS	2210	13/10	ITSPEC	827 - RETENTION INCENTIVE	VPR	-					\$19,146.00	18%	7/1/2012
AG90700801001000000000	5317	DOE, JANE	GS	0501	14/01	SUPVY FINANCL OFFICR	816 - RELOCATION INCENTIVE	VPO	-			\$38,676.00	0%			10/7/2012

Figure 52: Report With Selected Restrictions





## Dashboards

In the Common Report Library there is an assortment of dashboards, which provide the option to drill down to a detailed look at any specific point. Common Dashboards are accessible from any page through the top navigation bar.

Dashboards provide the user with a view of data across a common theme or purpose with the ability to drill down to a detailed look at a specific subset of information. Multiple reports within a dashboard provide a summary view.

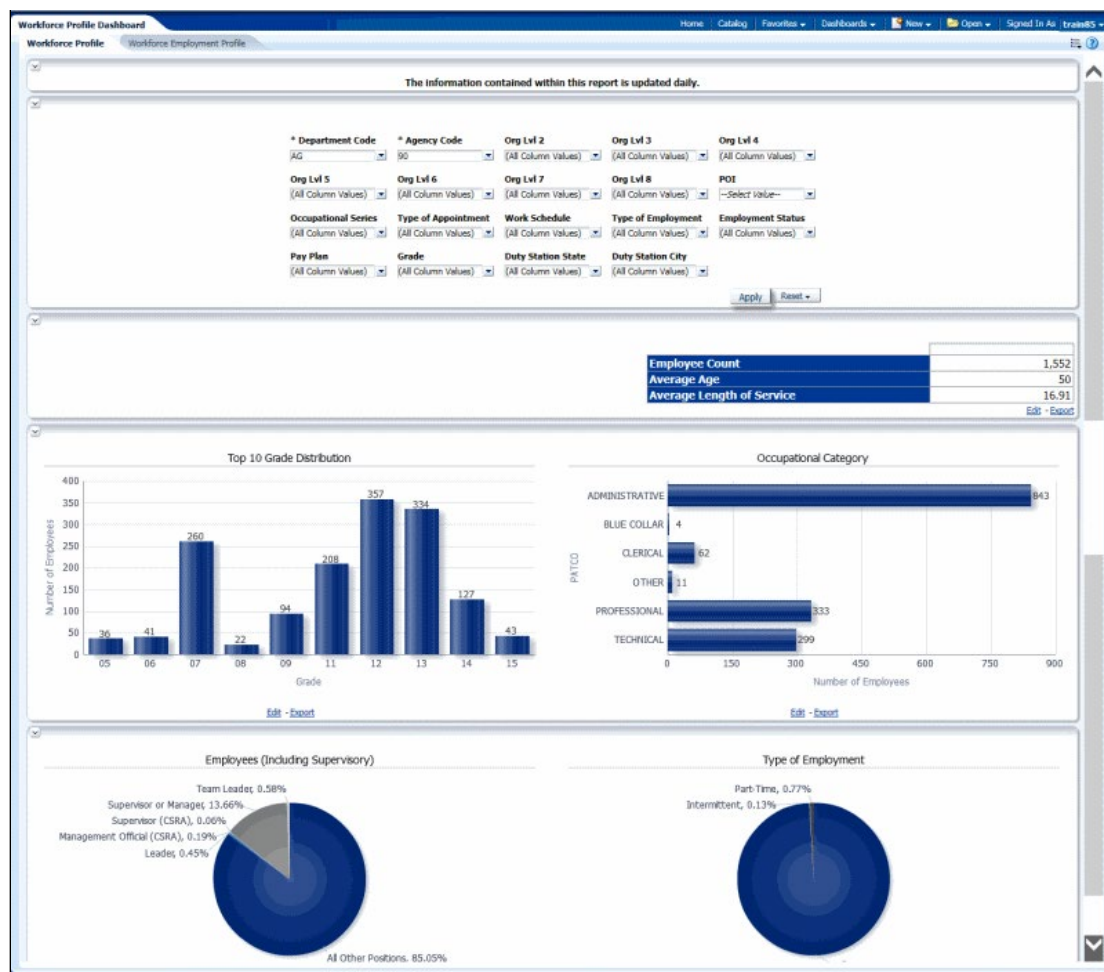


Figure 53: Dashboard Results

## Dashboards Objects

Use the **Dashboard Objects** pane to drag and drop dashboard objects to structure the layout within the **Dashboard** workspace.



The following options are available:

- **Column:** Defines columns within a dashboard page to structure the layout of a dashboard (e.g., side to side, horizontal, vertical). Users can create as many columns on a dashboard page as needed.
- **Section:** Divides a dashboard column into components. Sections are used within columns to structure content and can be aligned vertically or horizontally.
- **Alert Section:** Adds a section that displays alerts from schedulers.
- **Action Link:** Embeds a link in a report or dashboard. These links can navigate users to existing reports within Insight or external websites.
- **Link or Image:** Adds a text link or image on a page. This allows users to include a logo or image that brands a dashboard for an organization.
- **Embedded Content:** Displays another web page inside a dashboard page.
- **Text:** Includes static text or HTML within a dashboard. This feature allows users to add notes for a consumer of the dashboard (e.g., For Internal Purposes Only).
- **Folder:** Displays data elements which are structured in a Subject Area. Folders can appear within multiple Subject Areas.



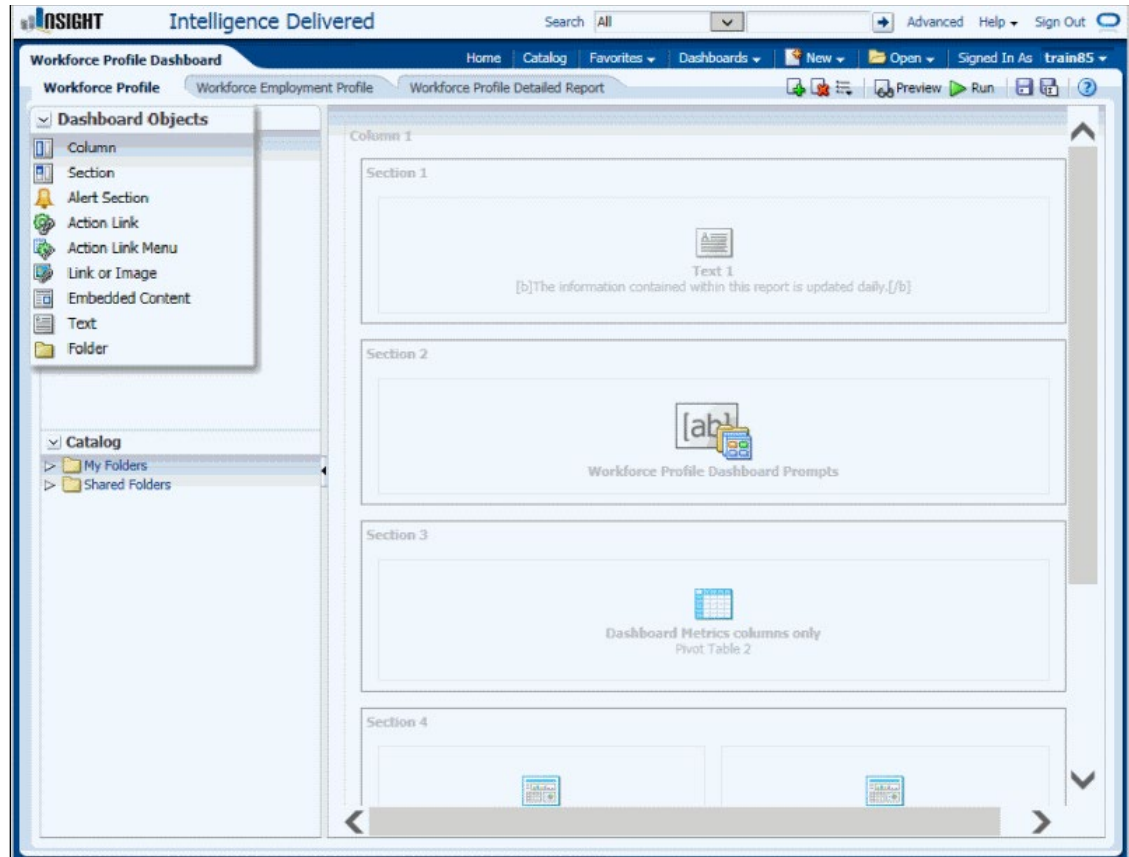


Figure 54: Dashboard Objects

## Accessing Dashboards

### To Open an Existing Dashboard:

1. Navigate to the **Dashboards** folder within the **Common Report Library**.
2. Select **Open** action link corresponding to the desired dashboard.

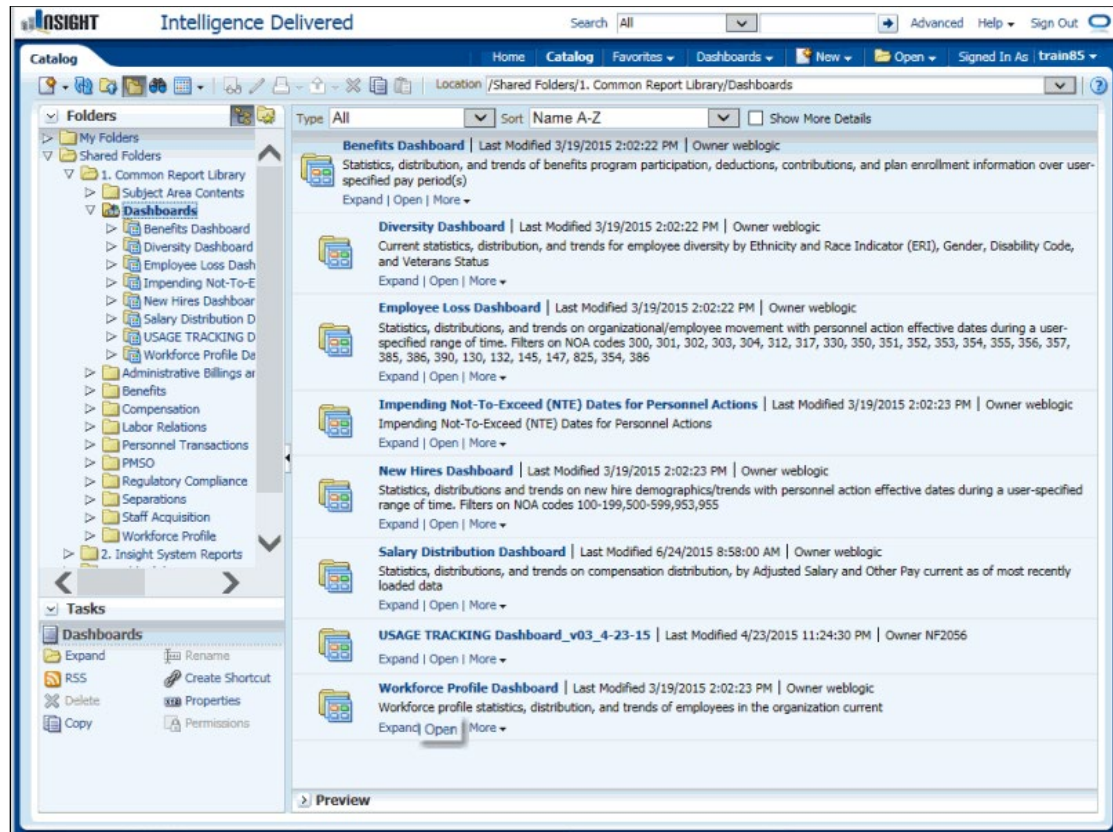


Figure 55: Open Action Link on an Existing Dashboard on the Catalog Page

Note: Selecting **Expand** action link will reveal each individual component of the dashboard (not recommended). Users should select **Open** action link to run the dashboard. Common dashboards can also be accessed from the Dashboards action link in the top navigation bar.

3. View the dashboard in a new page that contains several components, including dashboard pages, dashboard prompts, and dashboard reports.

Valid values are:

- Dashboard pages: Separates pages within the dashboard.
- Dashboard prompts: Allows users to manipulate the restrictions on data across multiple reports.
- Dashboard reports: Views individual reports that create each dashboard page.



**INSIGHT Intelligence Delivered** Search  Advanced Help Sign Out

**Workforce Profile Dashboard** Home Catalog Favorites Dashboards New Open Signed In As train85

**Workforce Profile** Workforce Employment Profile

* Department Code AG	* Agency Code 90	Org Lvl 2 (All Column Values)	Org Lvl 3 (All Column Values)	Org Lvl 4 (All Column Values)
Org Lvl 5 (All Column Values)	Org Lvl 6 (All Column Values)	Org Lvl 7 (All Column Values)	Org Lvl 8 (All Column Values)	POI --Select Value--
Occupational Series (All Column Values)	Type of Appointment (All Column Values)	Work Schedule (All Column Values)	Type of Employment (All Column Values)	Employment Status (All Column Values)
Pay Plan (All Column Values)	Grade (All Column Values)	Duty Station State (All Column Values)	Duty Station City (All Column Values)	

Apply Reset

**No Results**  
The specified criteria didn't result in any data. This is often caused by applying filters and/or selections that are too restrictive or that contain incorrect values. Please check your Analysis Filters and try again. The filters currently being applied are shown below.

SEPARATION\_ACCESSION\_TYPE is equal to 0, 3  
and DEPARTMENT\_CODE is equal to Please select A Department Code and Agency  
and "Calendar Time"."DAY\_START\_DATE" = VALUEOF("WFP\_LAST\_DAILY\_LOADED\_init"."wfp\_last\_daily\_loaded\_var")

Edit - Refresh

**No Results**  
The specified criteria didn't result in any data. This is often caused by applying filters and/or selections that are too restrictive or that contain incorrect values. Please check your Analysis Filters and try again. The filters currently being applied are shown below.

SEPARATION\_ACCESSION\_TYPE is equal to 0, 3  
and DEPARTMENT\_CODE is equal to Please select A Department Code and Agency  
and "Calendar Time"."DAY\_START\_DATE" = VALUEOF("WFP\_LAST\_DAILY\_LOADED\_init"."wfp\_last\_daily\_loaded\_var")  
and Employee Count is in top 10  
and DEPARTMENT\_CODE is equal to Please select A Department Code and Agency

Edit - Refresh

**Figure 56: Dashboard Pages, Prompts, and Reports**

Note: Dashboards from the **Common Report Library** will not display results in the dashboard reports until the mandatory prompt selections are made in the prompts section.

4. Select the data to display in the dashboard reports by using the dashboard prompts at the top of the dashboard page.





Figure 57: Dashboard Prompt Drop-Down Menu (Agency Code)

Note: Reports or dashboards containing a current snapshot will include a disclaimer identifying whether the data is updated daily or biweekly.

Note: If the user selects a data set that is too limited, an error message appears *Specified criteria didn't result in any data*. Select **Reset** to return the prompts to default values.

5. Select **Apply**, and the dashboard reports will update based on the selections made.

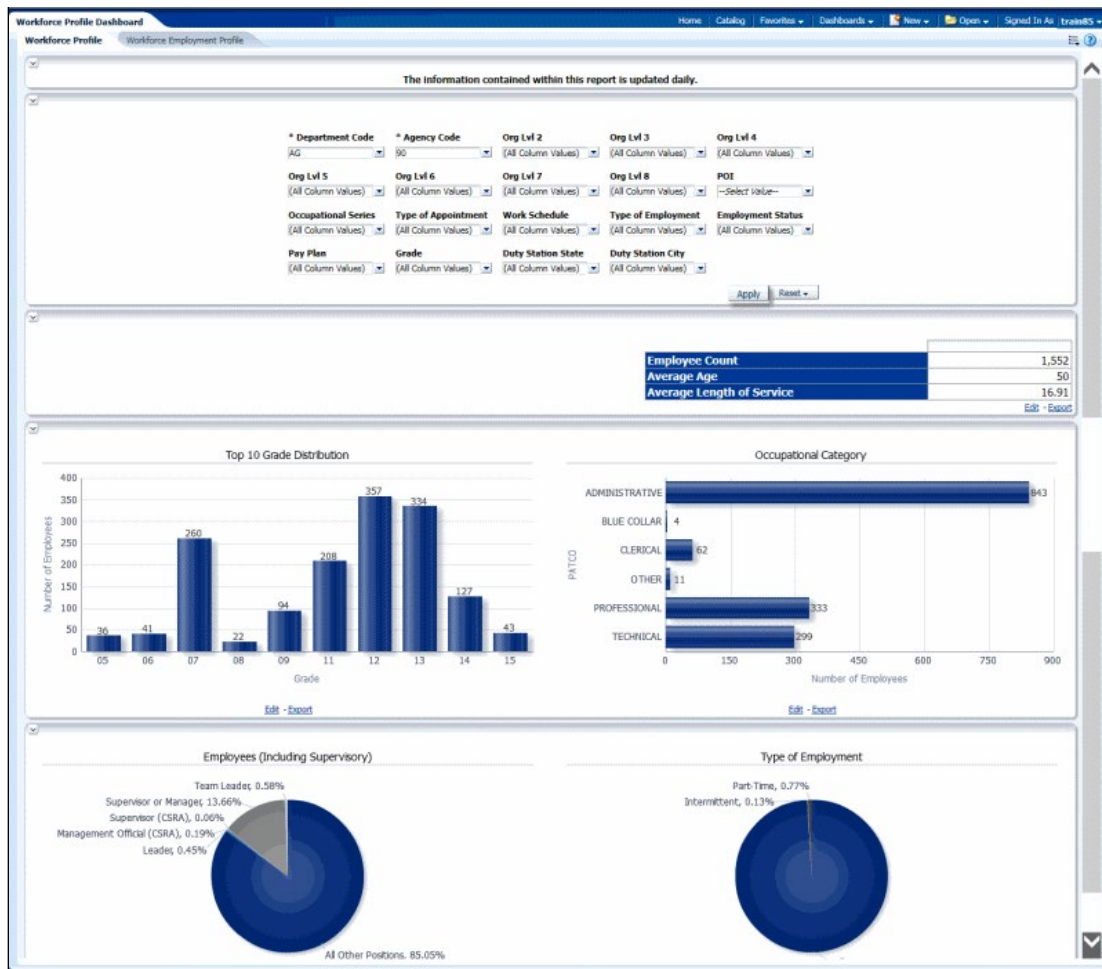


Figure 58: Workforce Profile Dashboard

## Running a Common Dashboard

### To Run a Common Dashboard:

1. Select **Catalog** action link on top navigation bar to access the Common Reports Library.
2. Select **Shared Folders** in the Folders pane.
3. Select **Common Report Library**.
4. Select **Expand** action link under the desired folder for more selections.



Note: When navigating through folders in the Folders pane, you must select the folder name to see the list of folders.

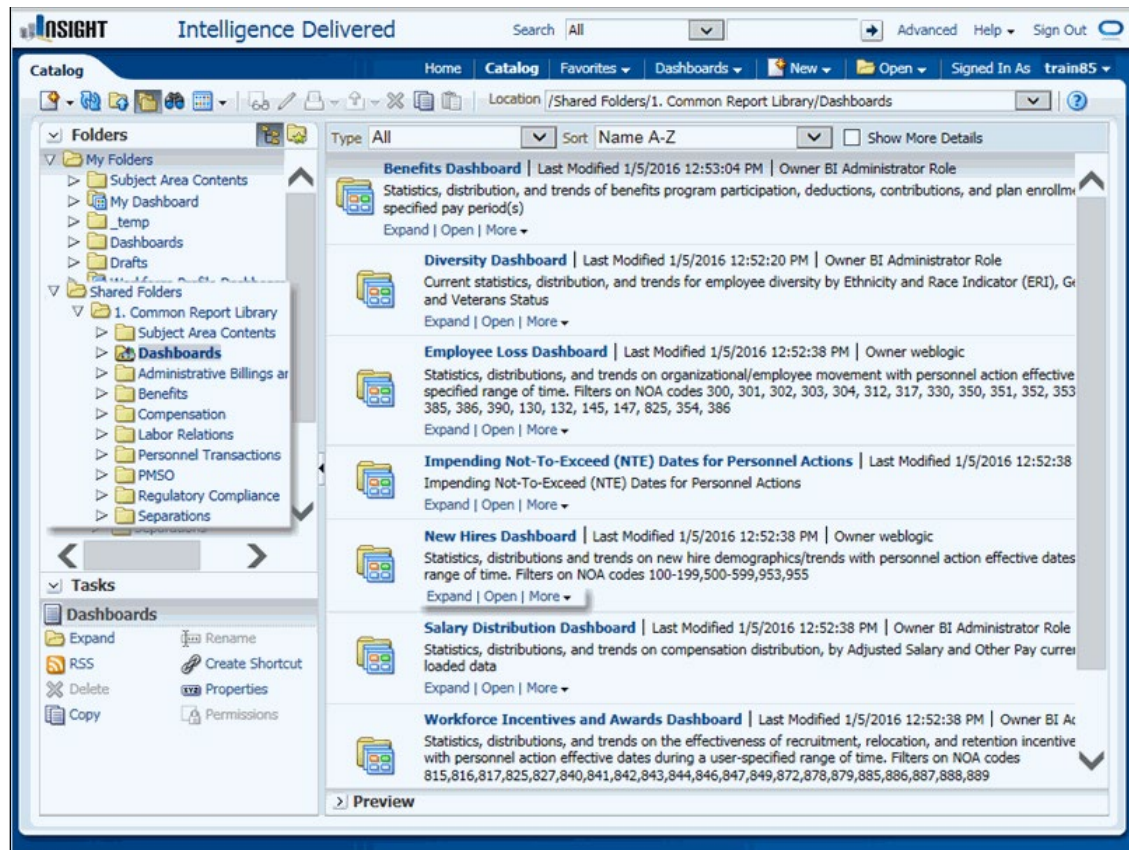


Figure 59: Selecting an Existing Dashboard

5. Select **Open** action link below the desired report.

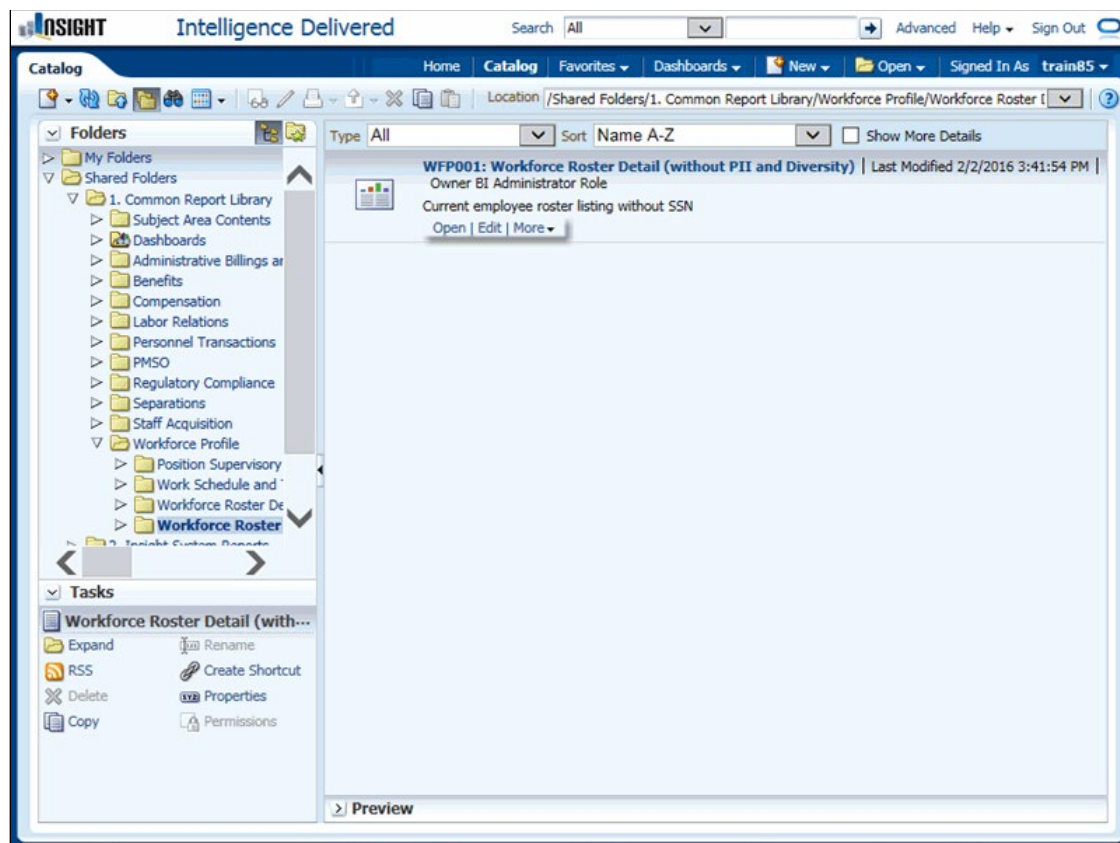


Figure 60: Dashboard Open Action Link



The dashboard prompts are displayed, which allow users to restrict data in a dashboard each time it runs.

INSIGHT Intelligence Delivered

WFP001: Workforce Roster Detail (without PII and Diversity)

Home Catalog Favorites Dashboards New Open Signed In As train85

**Workforce Roster Detail (without PII and Diversity)**

\* Department Code AG \* Agency 90 Org Lvl 2 (All Column Values) Org Lvl 3 (All Column Values) Org Lvl 4 (All Column Values)

Org Lvl 5 (All Column Values) Org Lvl 6 (All Column Values) Org Lvl 7 (All Column Values) Org Lvl 8 (All Column Values) POI --Select Value--

Pay Plan (All Column Values) Occupational Series (All Column Values) Grade (All Column Values)

Type of Appointment (All Column Values) Work Schedule (All Column Values) Type of Employment (All Column Values)

Duty Station State (All Column Values) Duty Station City (All Column Values)

Supervisory Status (All Column Values)

OK Reset

Edit - Refresh - Copy

Figure 61: Dashboard Prompts

6. Select the appropriate dashboard prompts to restrict data on the report.

Dashboard prompts can be used to restrict the data in a dashboard. Users will interact with two different types of dashboard prompts based on the type of data. They are:

- **Drop-Down:** Select from a list of potential values or type the selection directly into the field.

---

Note: After making selections in a drop-down prompt, select in the white space of the prompts page to accept the selections. This action allows the prompts to cascade correctly, if applicable.

---

- **Calendar:** Select the date (month, day, and year) from the calendar view.

---

Note: Dashboards that use time prompts, such as a pay period and a year, contain historical data. By completing the time prompts, users can restrict data to a certain time range.

---



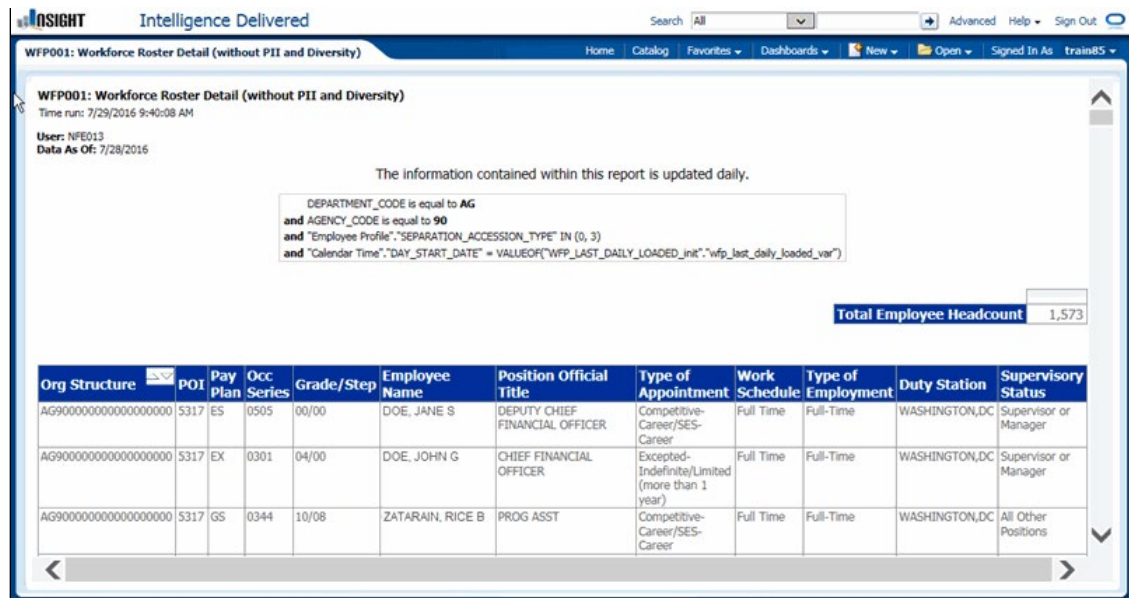


7. Select **OK** to run the dashboard results. The dashboard name is displayed. The dashboard table, graph, or other dashboard components populate based on restrictions applied by the dashboard prompts.

**OR**

Select **Reset** to return all dashboard prompts to the default.

The run view displays the dashboard results.



**Figure 62: Dashboard Run View**

## Customizing a Dashboard with Styles and Formatting

### To Customize a Dashboard with Styles and Formatting:

1. Select **Catalog** action link from the navigation bar.
2. Select **Shared Folders** in the Folders pane.
3. Select **Common Report Library** in the shared folders. The Common Report Library is displayed.

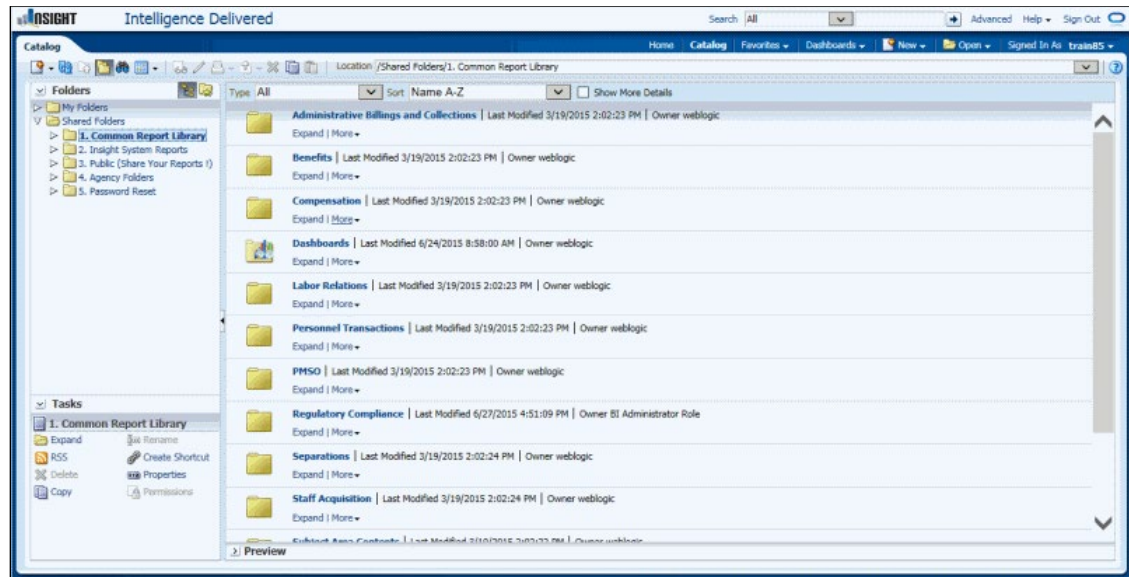


Figure 63: Common Report Library Within Catalog Action Link

4. Navigate to the desired dashboard within the Common Report Library.

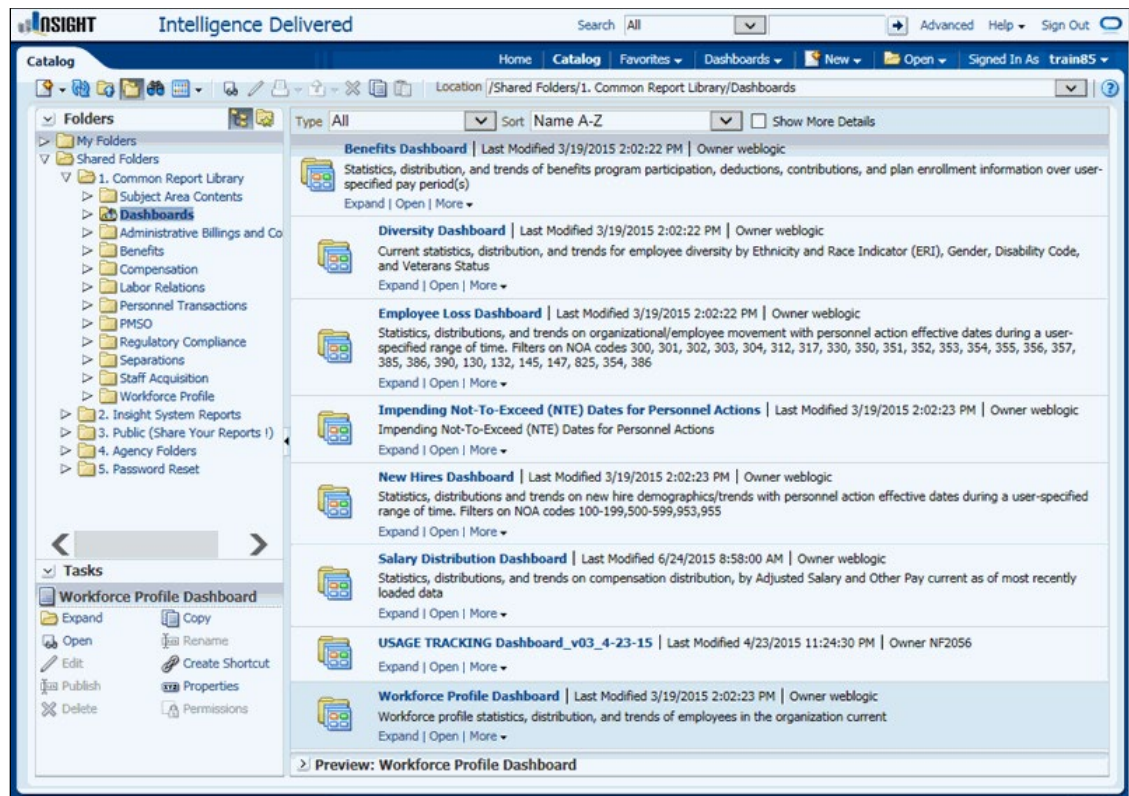



Figure 64: Dashboards Within the Common Report Library



Icon Name	Definition	Example	Icon
Dashboard	Presents a snapshot of data findings across multiple reports or analysis within a common theme of purpose. Dashboard provides management summaries, drill-down analysis, trend analysis, variance analysis, etc.	Dashboard New Hires Dashboard	

5. Select **More** action link.
6. Select **Copy** from the drop-down menu.

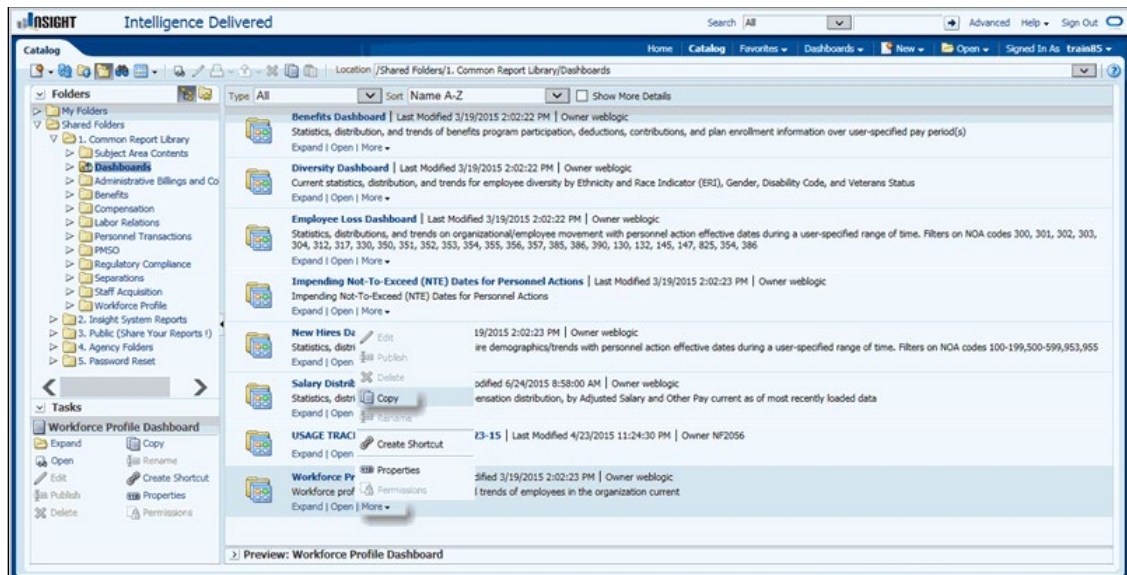


Figure 65: Copy Option Within the More Drop-Down Menu

7. Select **Paste** from the **Tasks** pane and navigate to My Folders and paste the dashboard into the desired location.

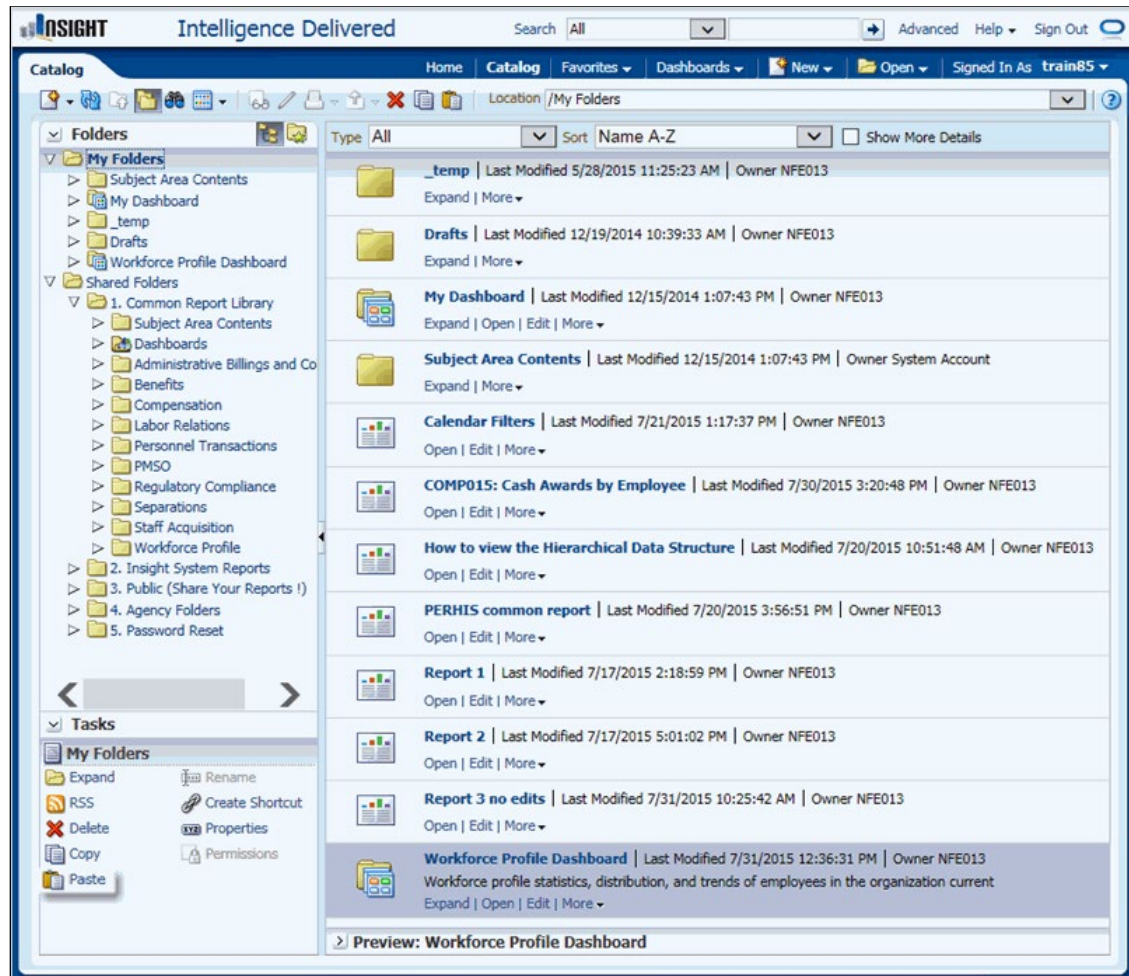


Figure 66: Paste Action Link in My Folder

8. Select **Edit** action link that corresponds to the newly pasted dashboard.



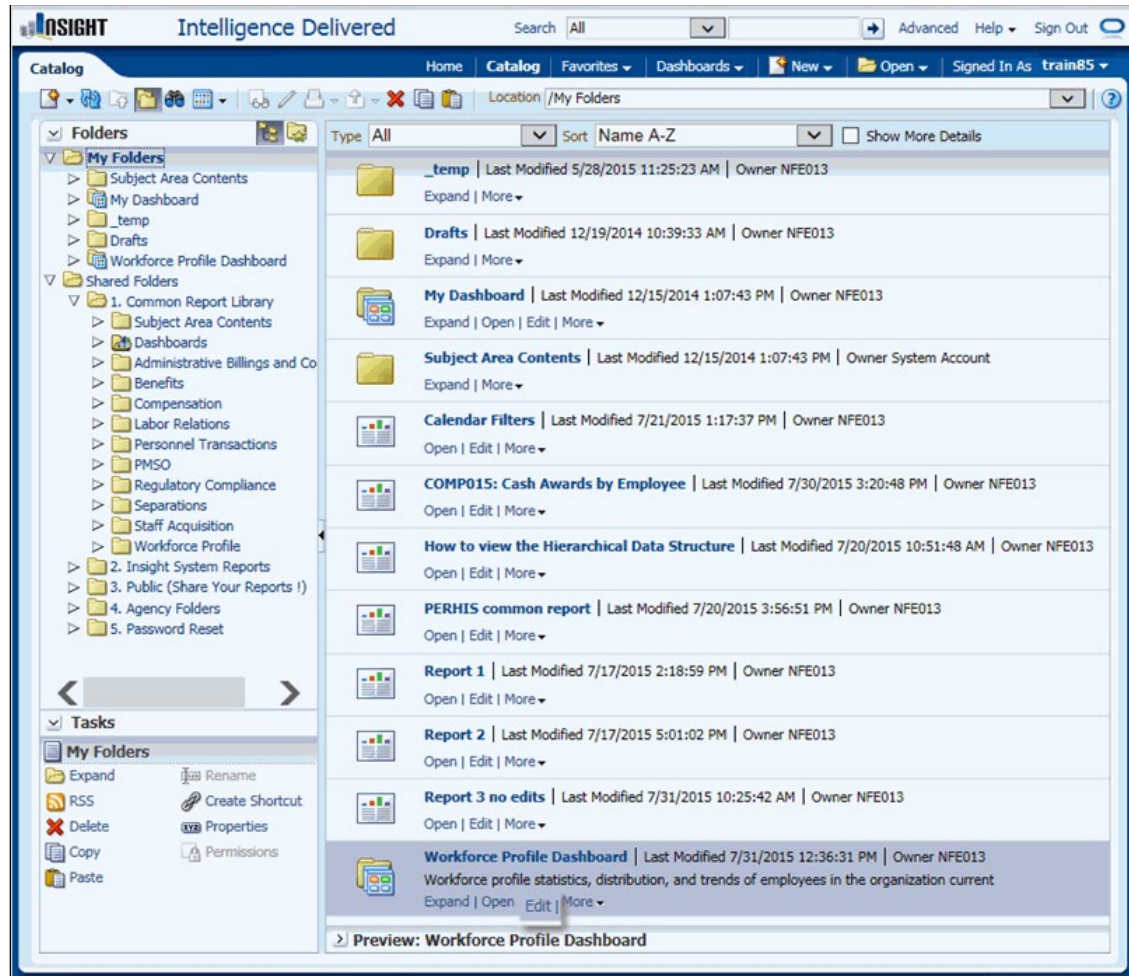


Figure 67: Edit Action Link for Common Dashboard Within My Folders

9. View the **ad hoc dashboard editing** page to edit the structure of the dashboard using the following components:
  - **Dashboard Objects:** Lists the structural elements (e.g., column, section) and individual items (e.g., text, action link) available for dashboard development.
  - **Catalog:** Provides access to saved items (e.g., reports, dashboard prompts) in My Folders and Shared Folders.
  - **Dashboard Workspace:** Outlines the dashboard components as they appear when the dashboard is run.

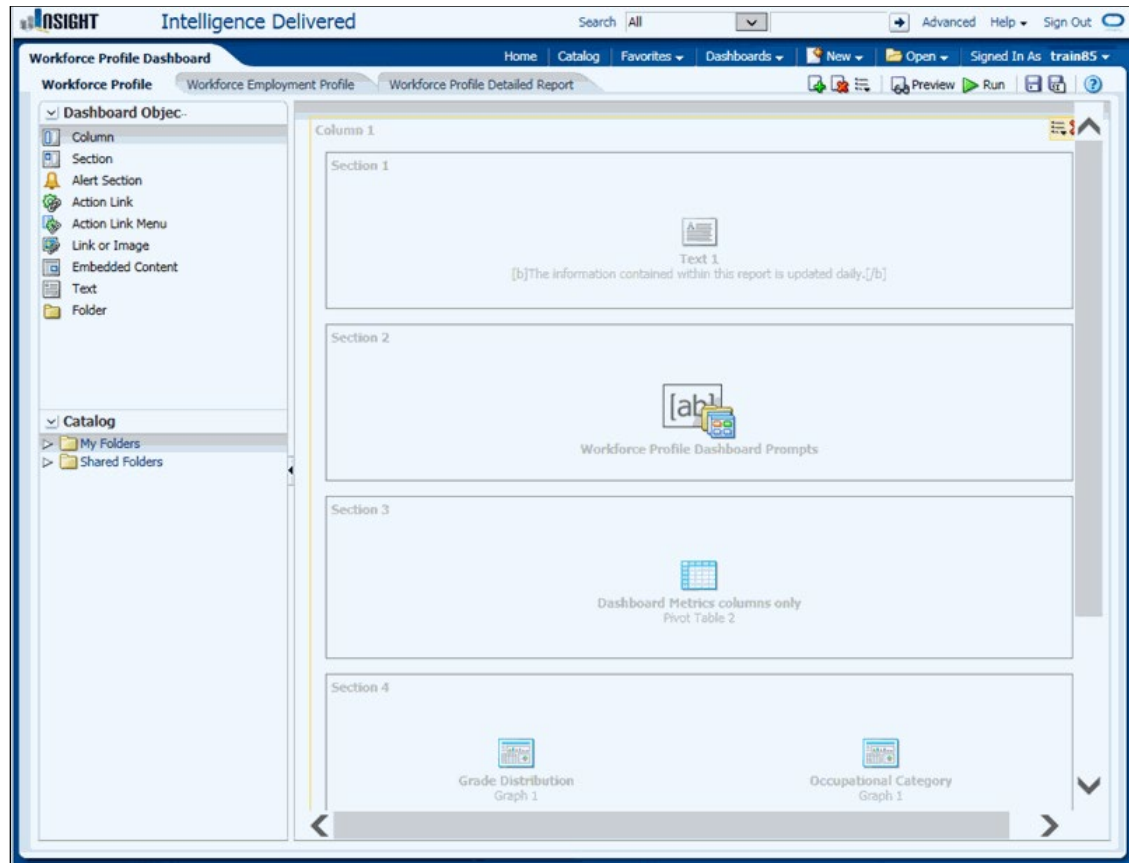


Figure 68: Ad Hoc Dashboard Editing Page

10. Use the ad hoc dashboard navigation bar to customize, preview, and run a dashboard.

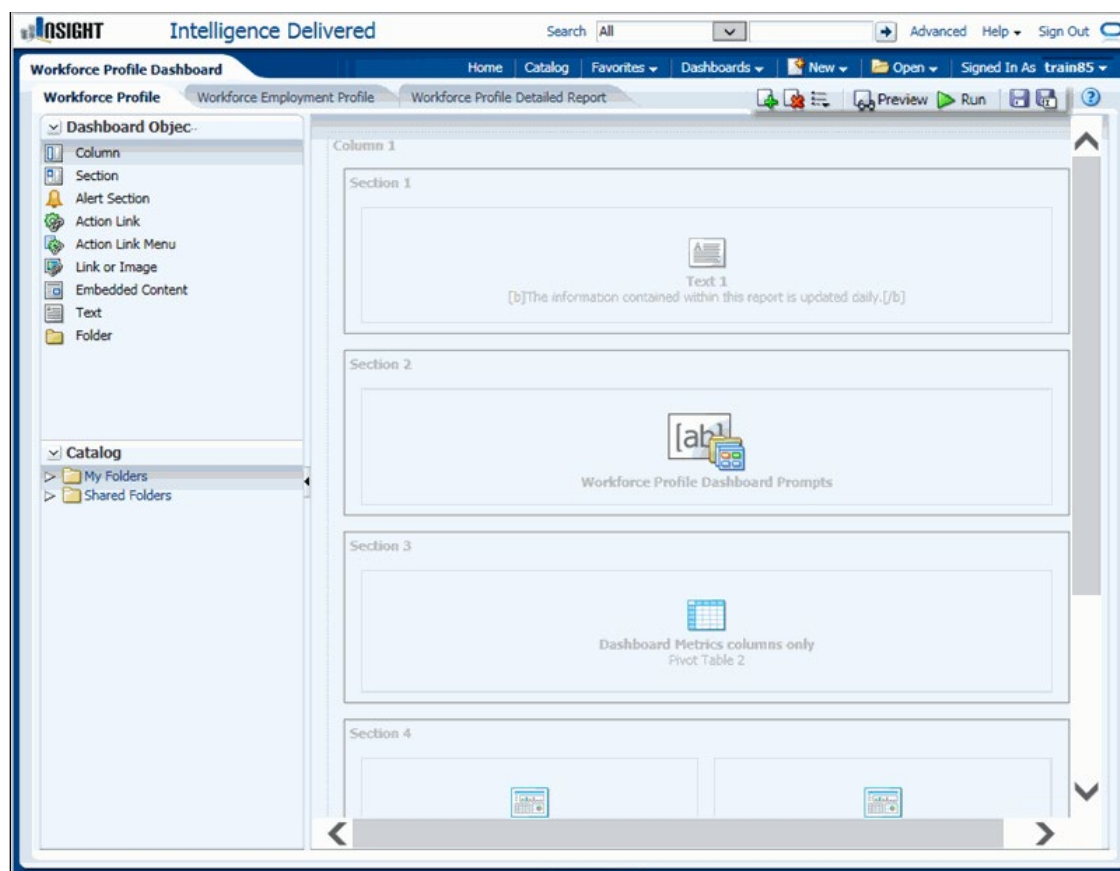






Figure 69: Dashboard Navigation Bar

Icon Name	Definition	Icon
Add Dashboard Page	Adds a new page to the dashboard.	
Delete Current Page	Deletes the current dashboard page.	
Preview	Previews a dashboard before it runs in a new page.	
Run	Runs the dashboard to view results.	



## Editing the Dashboard Layout

The Ad Hoc Dashboard Editing page contains options to design the layout of a dashboard by dragging and dropping dashboard objects and items from the Catalog.

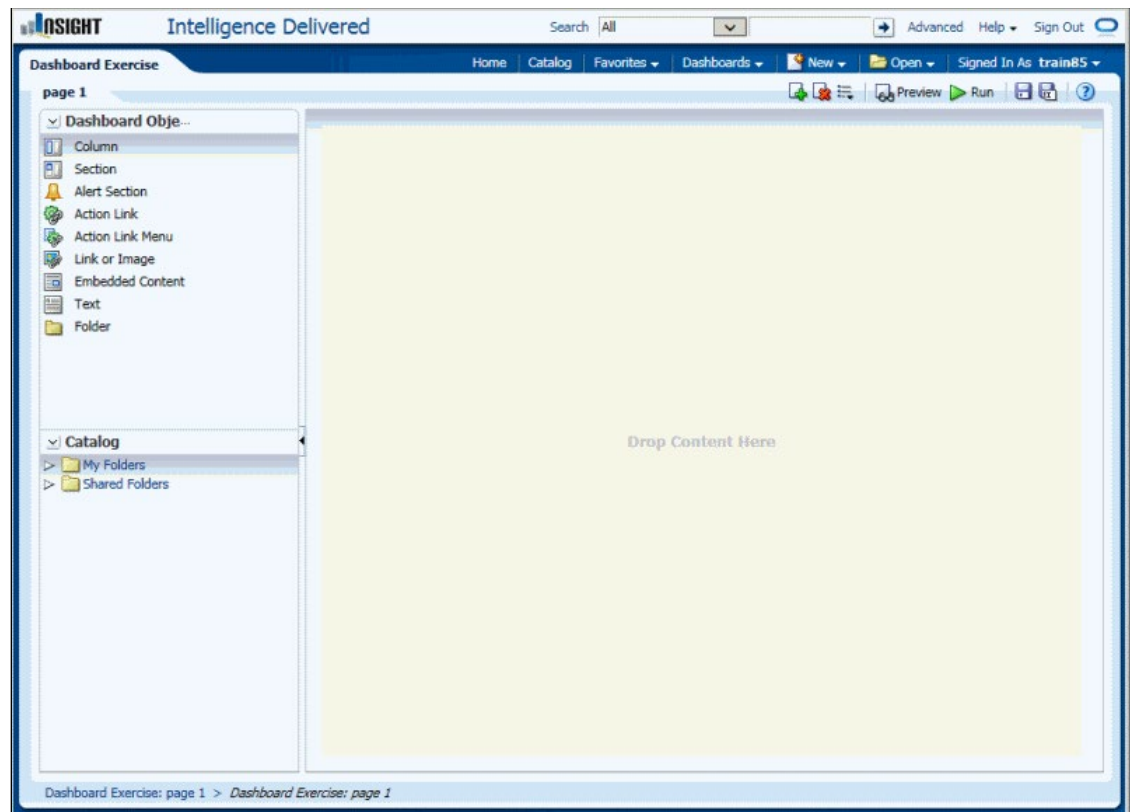


Figure 70: Ad Hoc Dashboard Navigation Bar with Edit Icon

### To Use the Ad Hoc Dashboard Editing page:

1. Drag and drop the Column object from the Dashboard Objects pane into the Dashboard workspace.



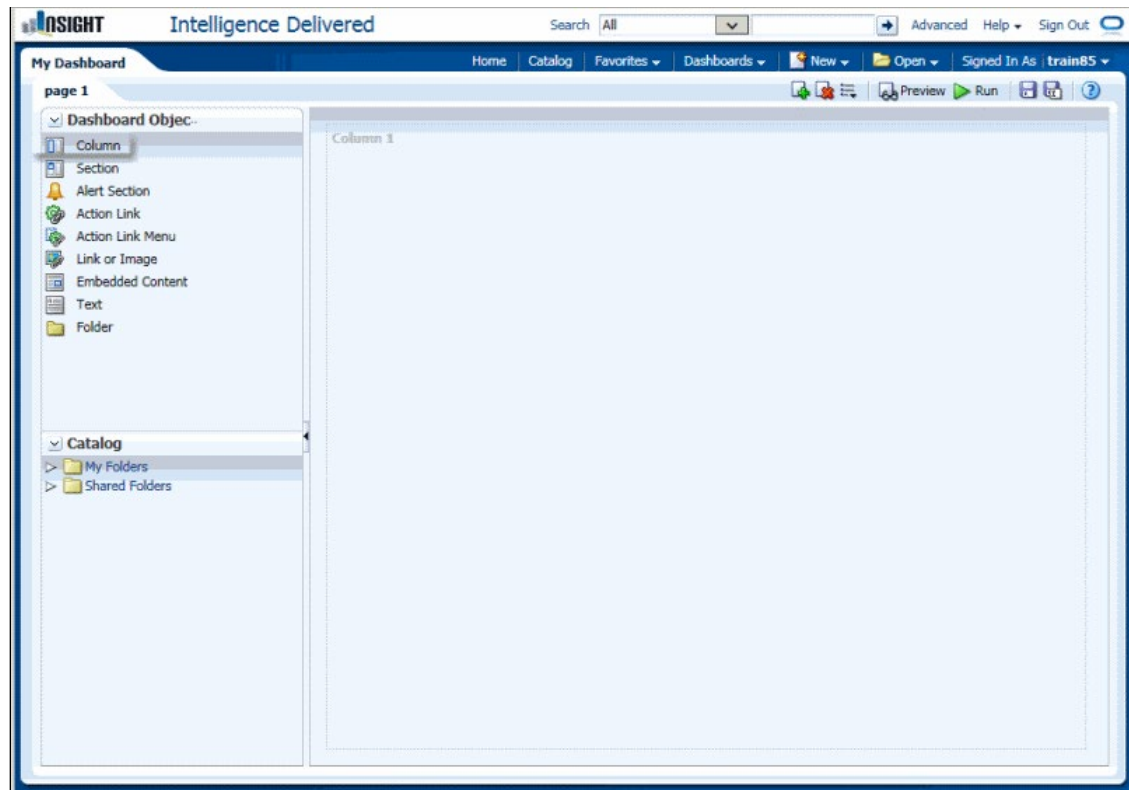


Figure 71: Dashboard Object with Column Option

2. Navigate to the Column 1 pane. The **Column Properties** and **Delete** icons will appear.

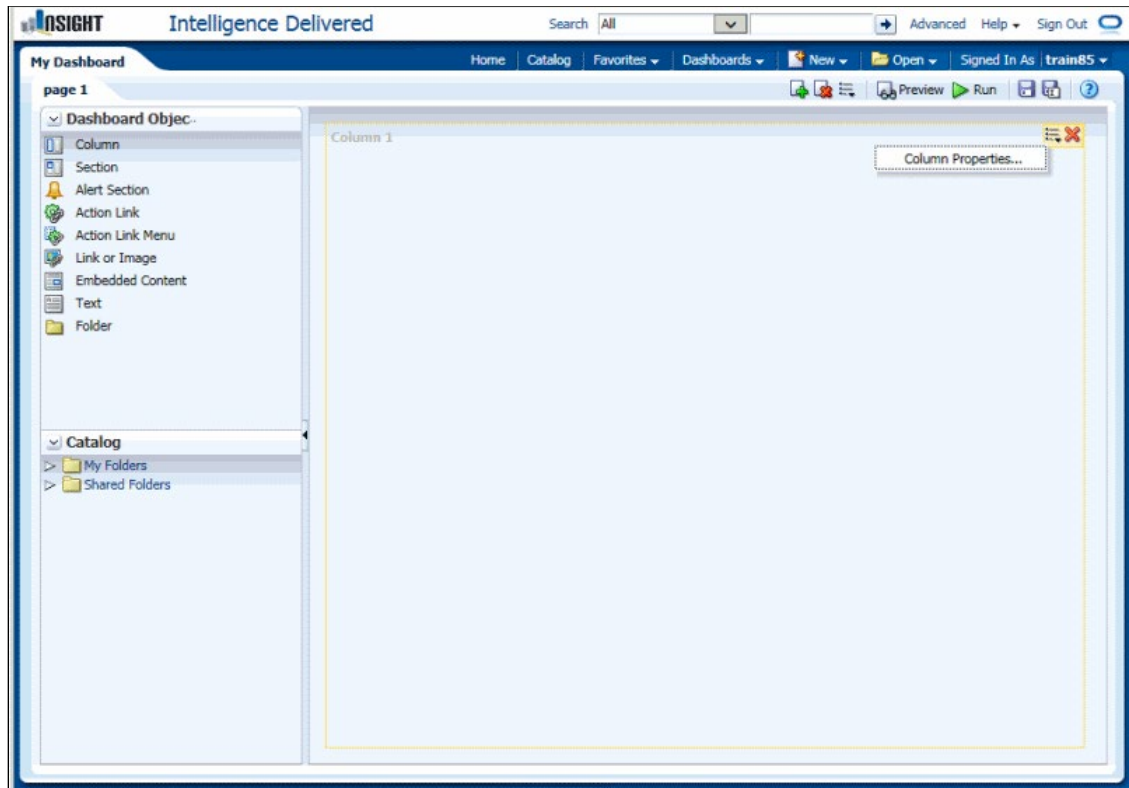
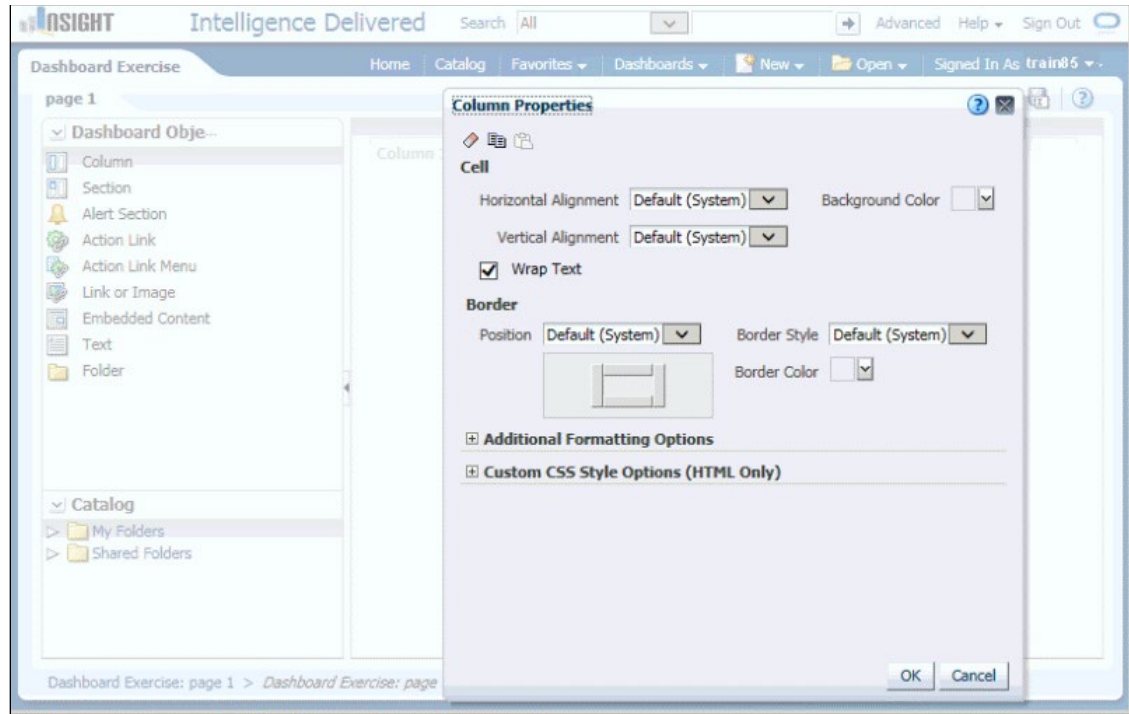


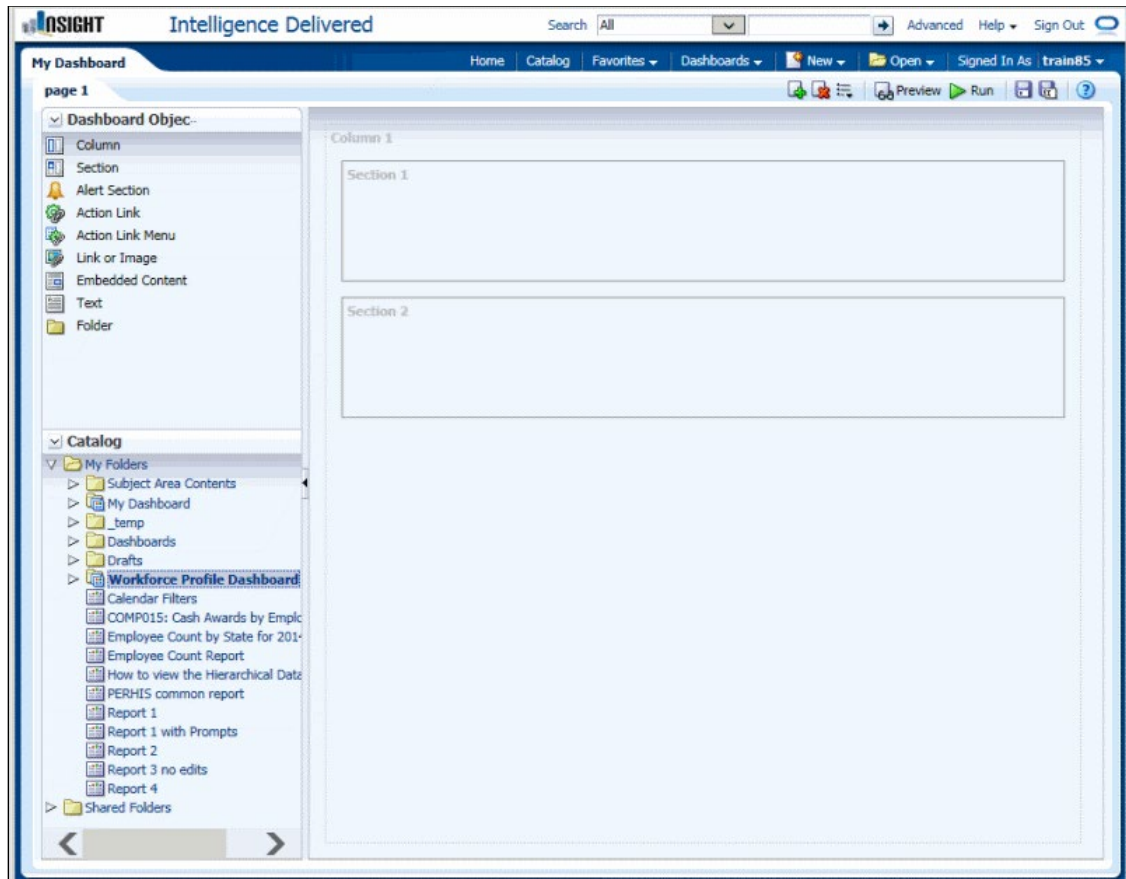
Figure 72: Dashboard Column Properties and Delete Icon

3. Select **Column Properties** to customize the appearance of the column in the dashboard. The Column Properties are displayed.



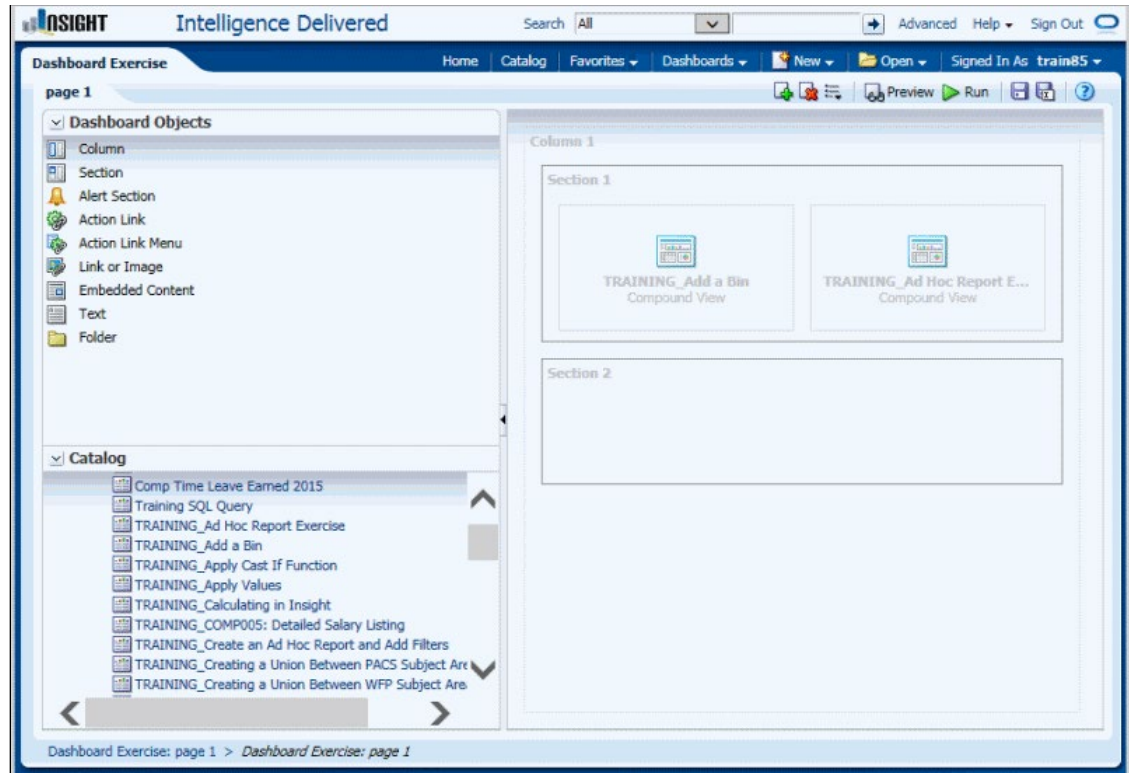
**Figure 73: Column Properties popup**

4. View the Column Properties, which allows users to customize the styles and formatting of a Column in the dashboard.
5. Drag Sections into the existing Columns to continue to build out the structure of the dashboard.



**Figure 74: Dashboard Workspace With Sections**

6. Drag and drop reports into the dashboard from Shared Folders or My Folders in the Catalog page.



**Figure 75: Dashboard Workspace With Reports**

Note: If users add a common report containing prompts to a dashboard, the prompts appear when the dashboard runs. Users must first remove the prompts and save the report to My Folders before using the report in a dashboard.

## Editing Dashboard Print Properties

### To Edit the Dashboard Print Properties:

1. Select **Edit** icon from the dashboard navigation bar in the ad hoc dashboard editing page.

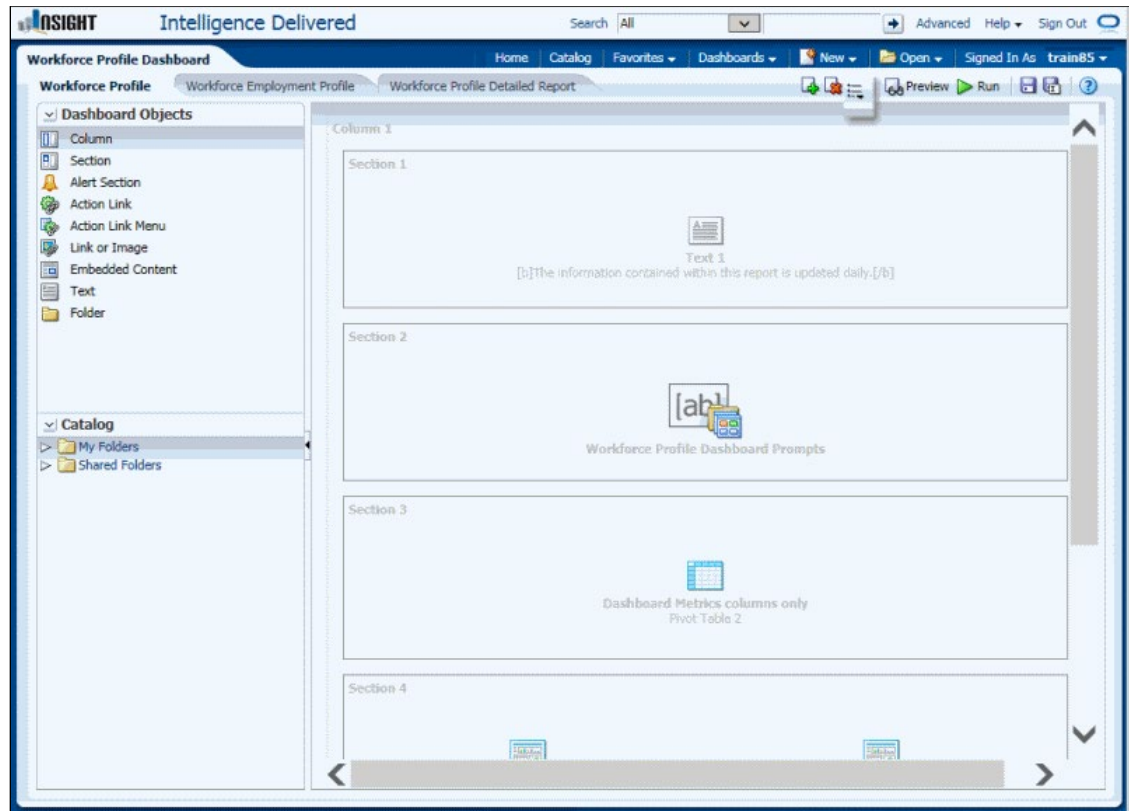


Figure 76: Ad Hoc Dashboard Edit Icon

2. Select **Print Options**. The Print Options popup appears.

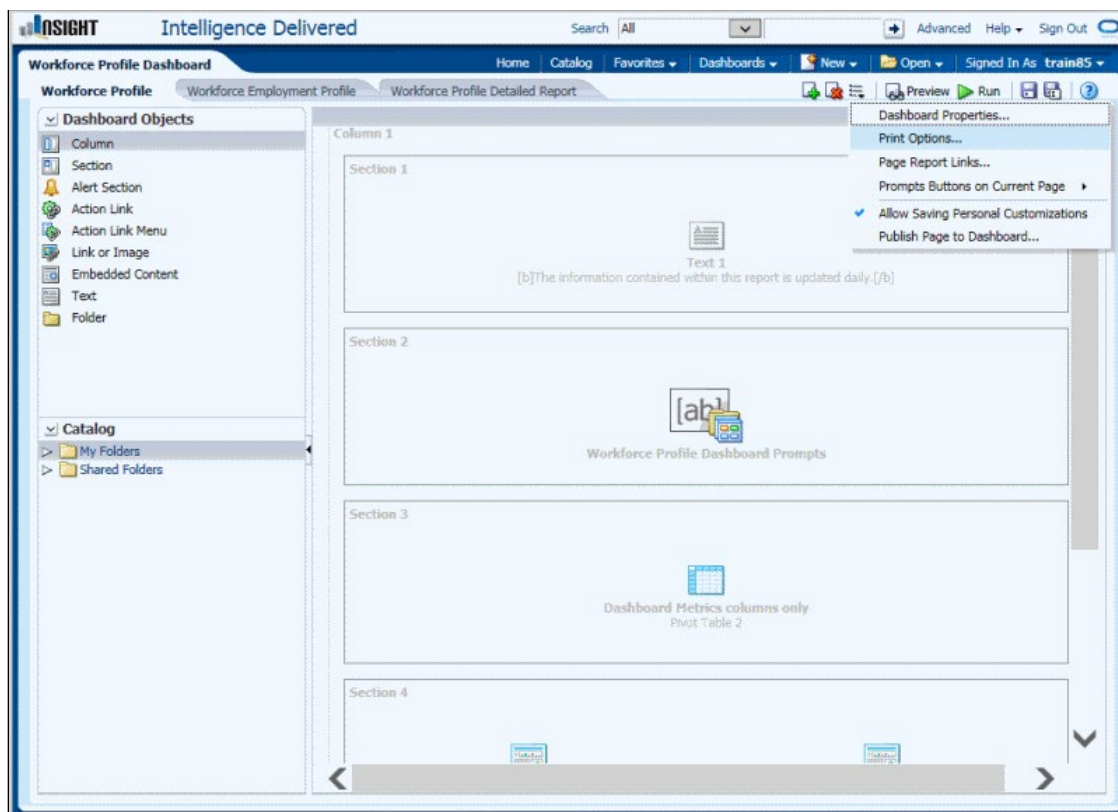


Figure 77: Dashboard Edit Icon Drop-Down Menu With Print Options

3. Use the **Print Options** popup to customize the page settings and choose whether to include a Header or Footer when the dashboard prints.

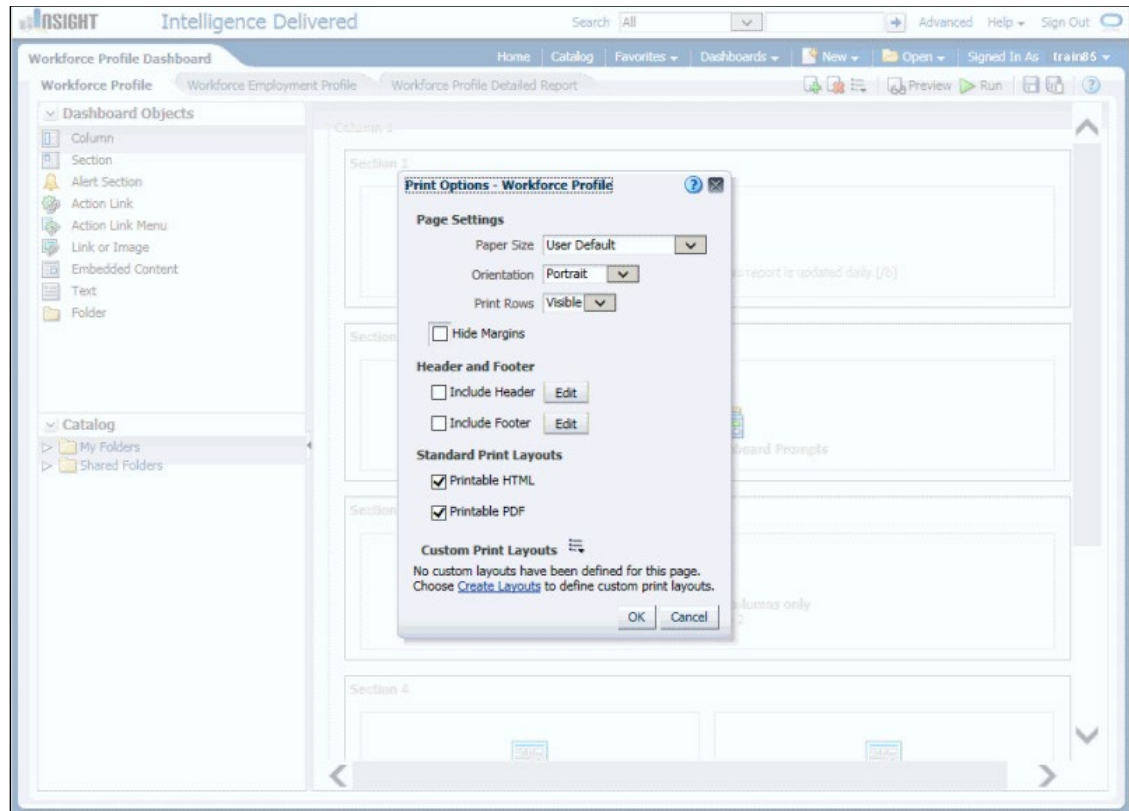
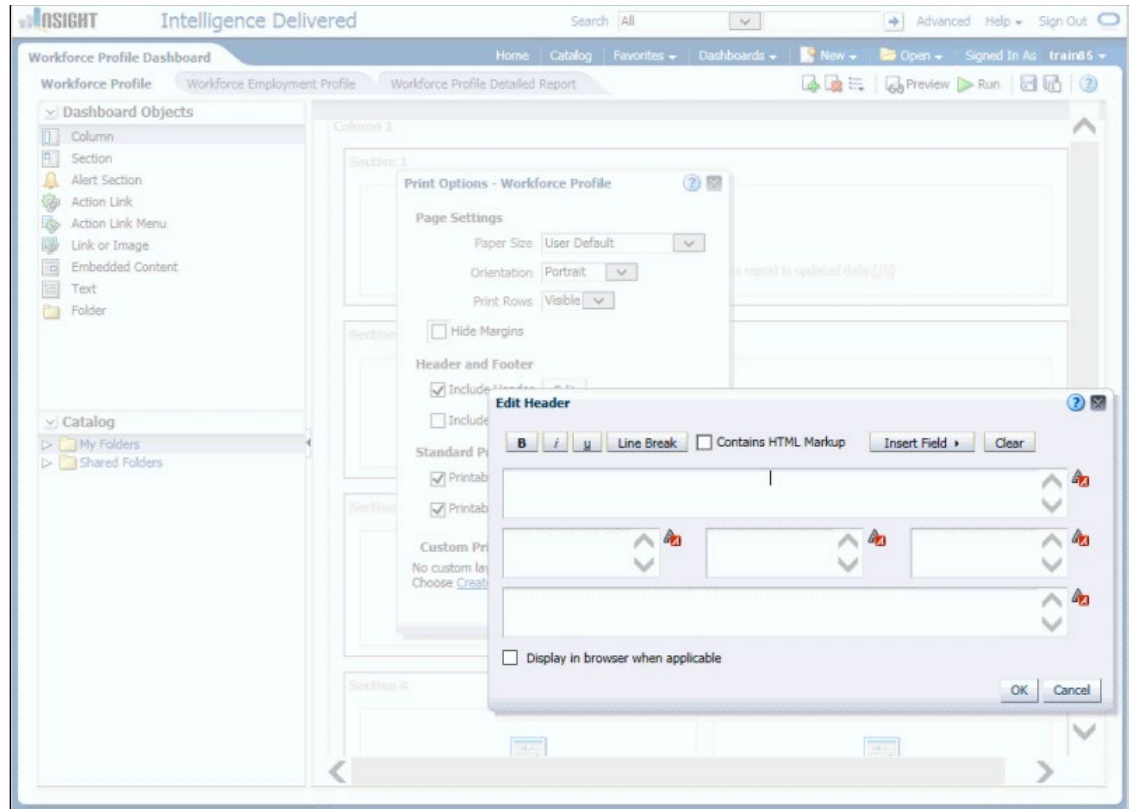


Figure 78: Print Options Window for Dashboard

4. Select the respective checkbox.
5. Select **Edit** to customize the Header or Footer.
6. Use the Edit Header or Edit Footer popup to input text and customize the stylistic formatting (e.g., font, color).
7. Select **OK** to close the Edit Header or Edit Footer popup. The user is returned to the Print Options popup.





**Figure 79: Edit Header popup**

8. Select **OK** on the Print Options popup to accept all text and customize the stylistic formatting.
9. Select **Save** icon from the dashboard navigation bar to save edits to the dashboard.

## Arranging Dashboards Vertically or Horizontally

Dashboards may be arranged vertically or horizontally.

### To Edit Dashboard Layouts:

1. Select **Vertical Layout**.

**OR**

**Horizontal Layout** icons to arrange the objects.

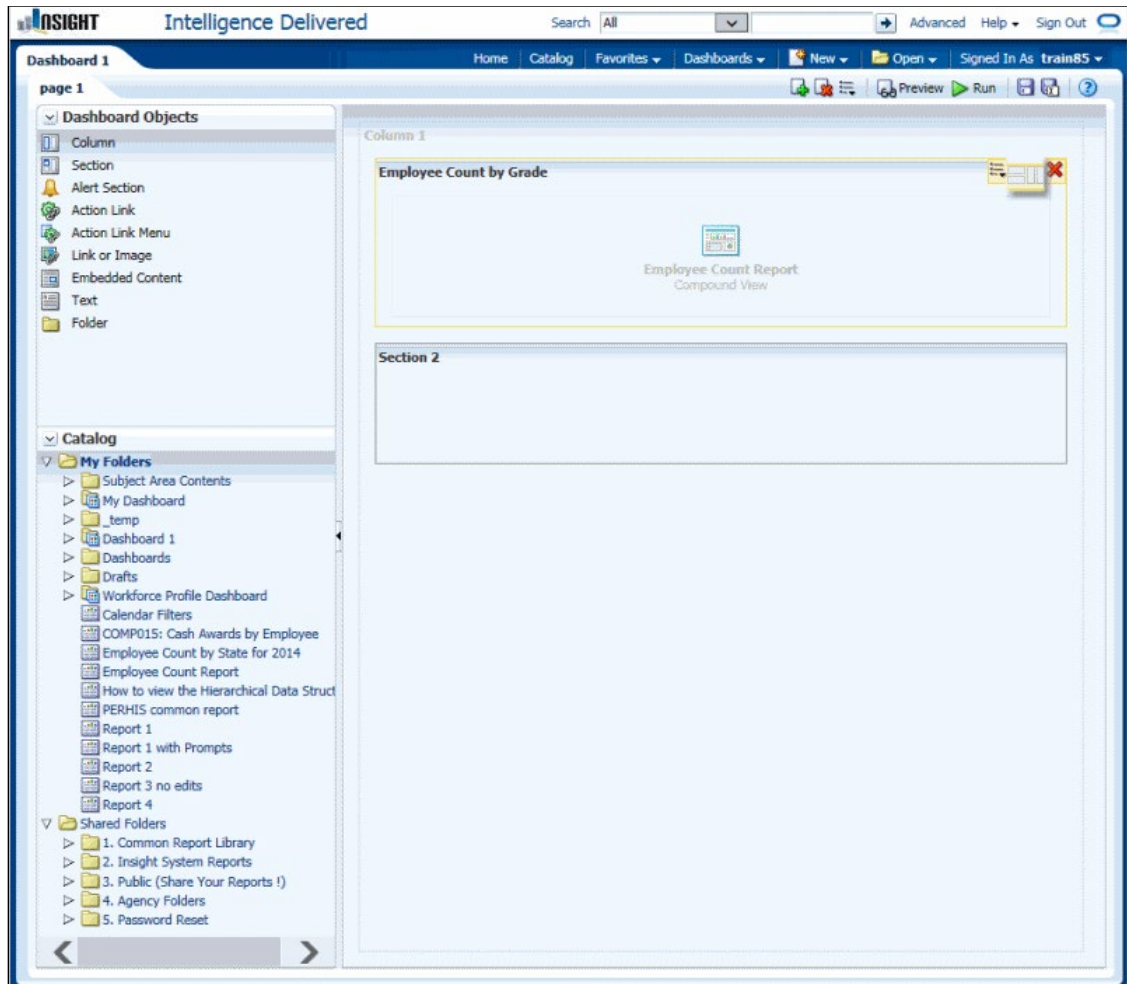


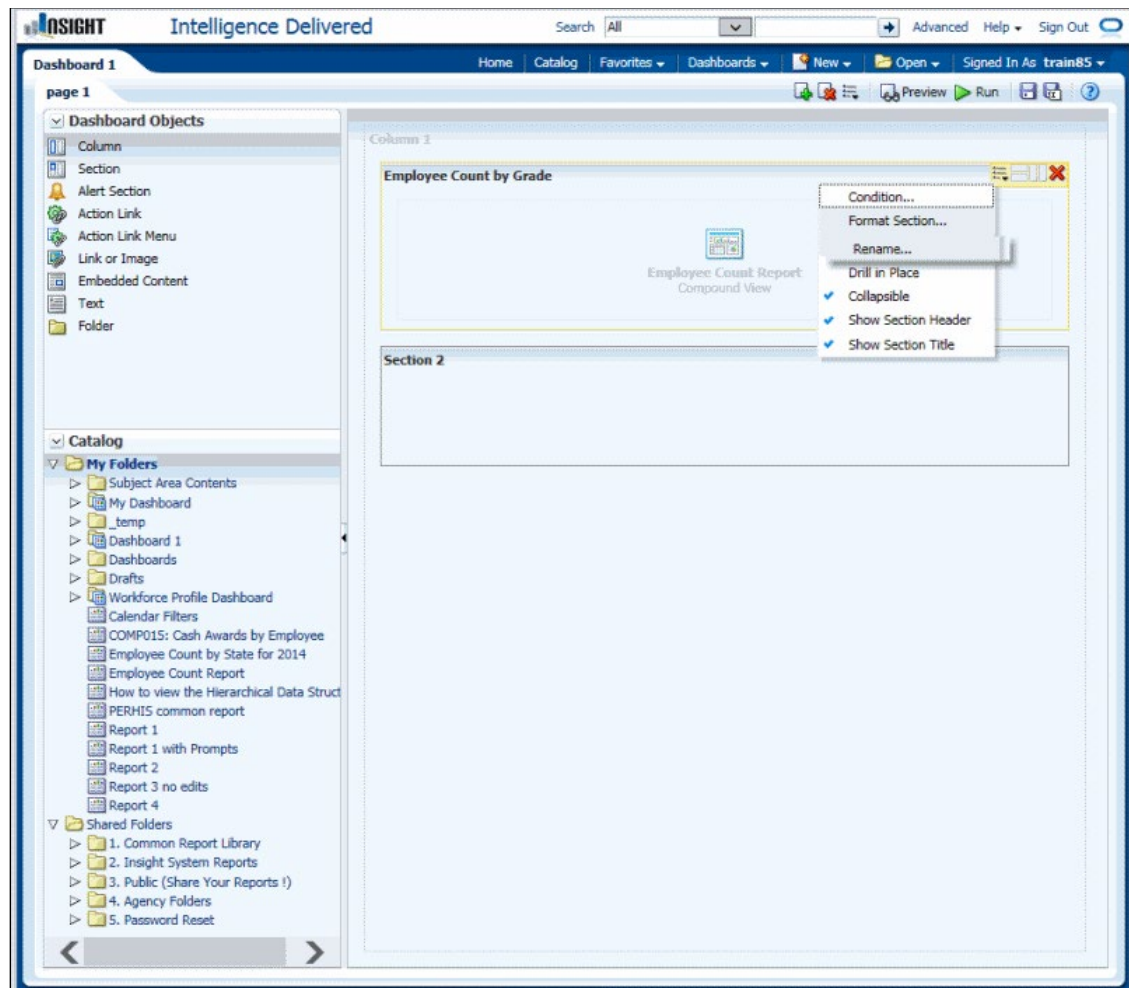
Figure 80: Dashboard Object Icons

Icon Name	Definition	Icon
Vertical Layout	Arranges items in a Section vertically	
Horizontal Layout	Arranges items in a Section horizontally.	

2. Select from a menu of additional editing options from the Section Properties drop-down menu. Valid values are:
  - **Format Section:** Edits the alignment, background color, and border color.
  - **Drill in Place:** Specifies how the results display when a user drills down on a dashboard report. If this option is selected, the original report will be replaced by the drilled-down report.



- ***Collapsible***: Specifies whether a user can expand and collapse a Section.
  - ***Show Section Header***: Displays the Section Header in the dashboard.
  - ***Show Section Title***: Displays the Section Title in the dashboard.
3. Select the **Edit** icon corresponding to the Section.
  4. Select **Rename** from the available options. The Rename option is displayed.



**Figure 81: Dashboard Object Edit Icon Drop-Down Menu with Rename**

5. Enter the desired Section Title name in the text box within the **Rename** box.
6. Select the **Format** icon within the Rename box to customize the Section Headings.

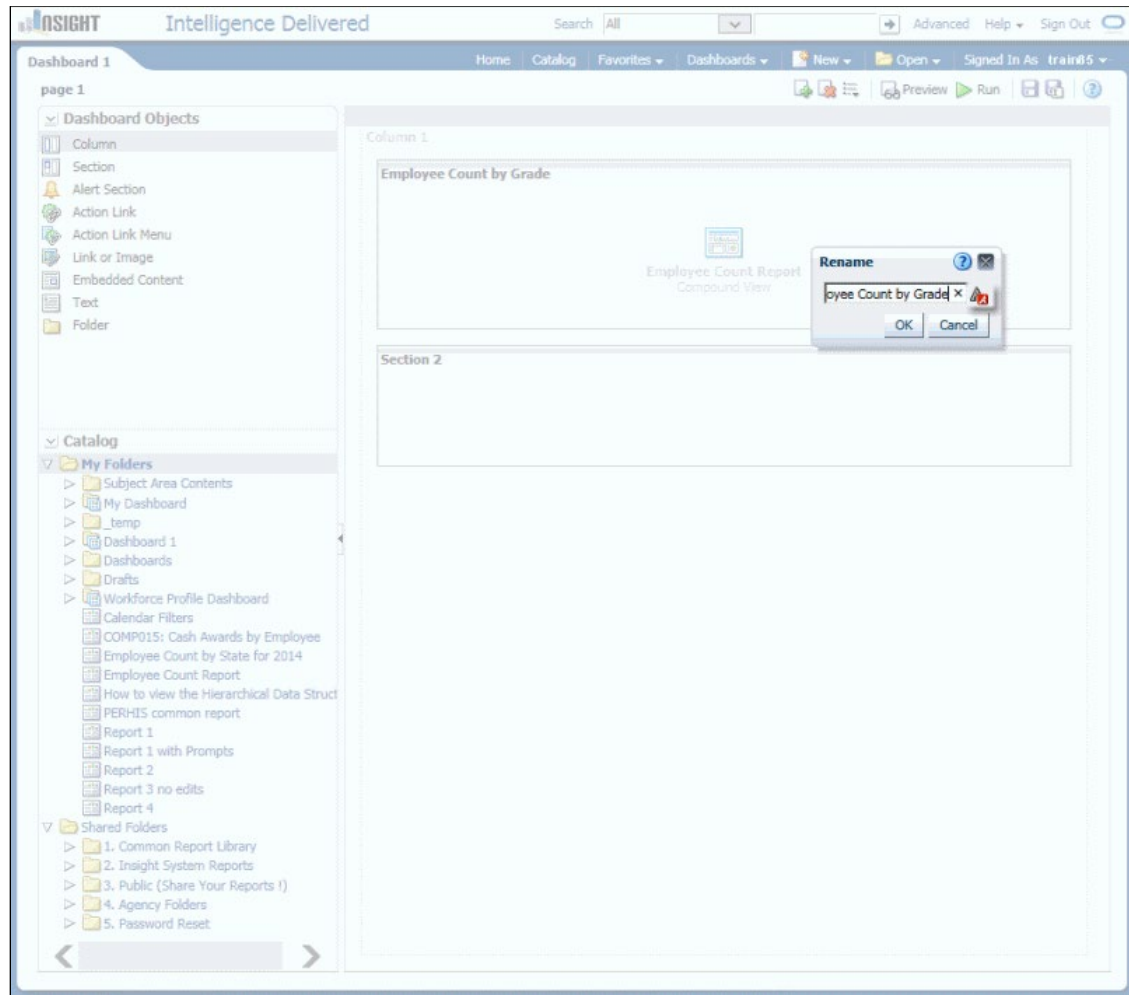
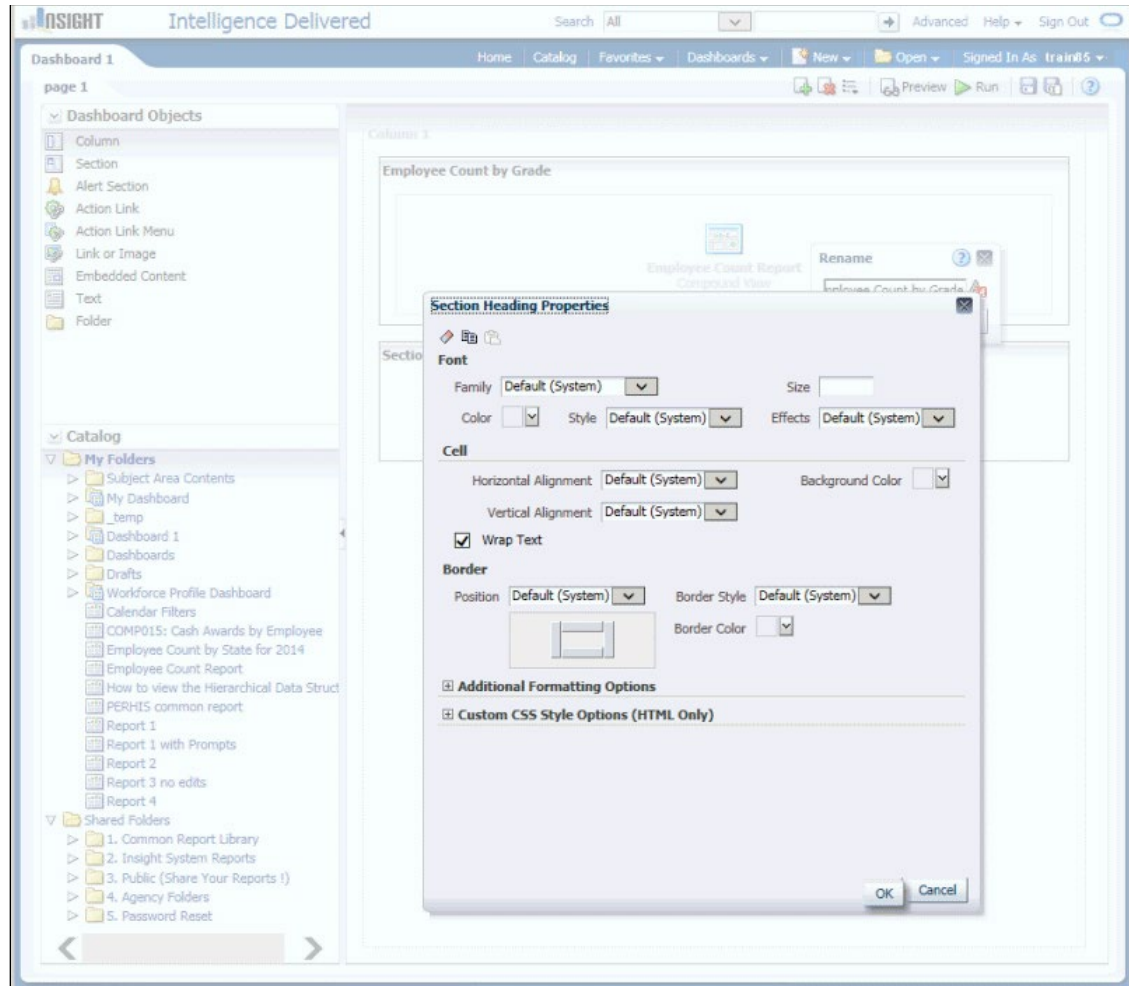


Figure 82: Rename box

7. Customize the Section Heading's font style, color, and other styles and formatting options.
8. Select **OK** to close the Rename box. The customizations are saved.



**Figure 83: Section Heading Properties Window**

9. Make any applicable changes.
10. Select the **OK** button to close the popup.
11. Select **Show Section Title** to display the customized section title when the dashboard runs.

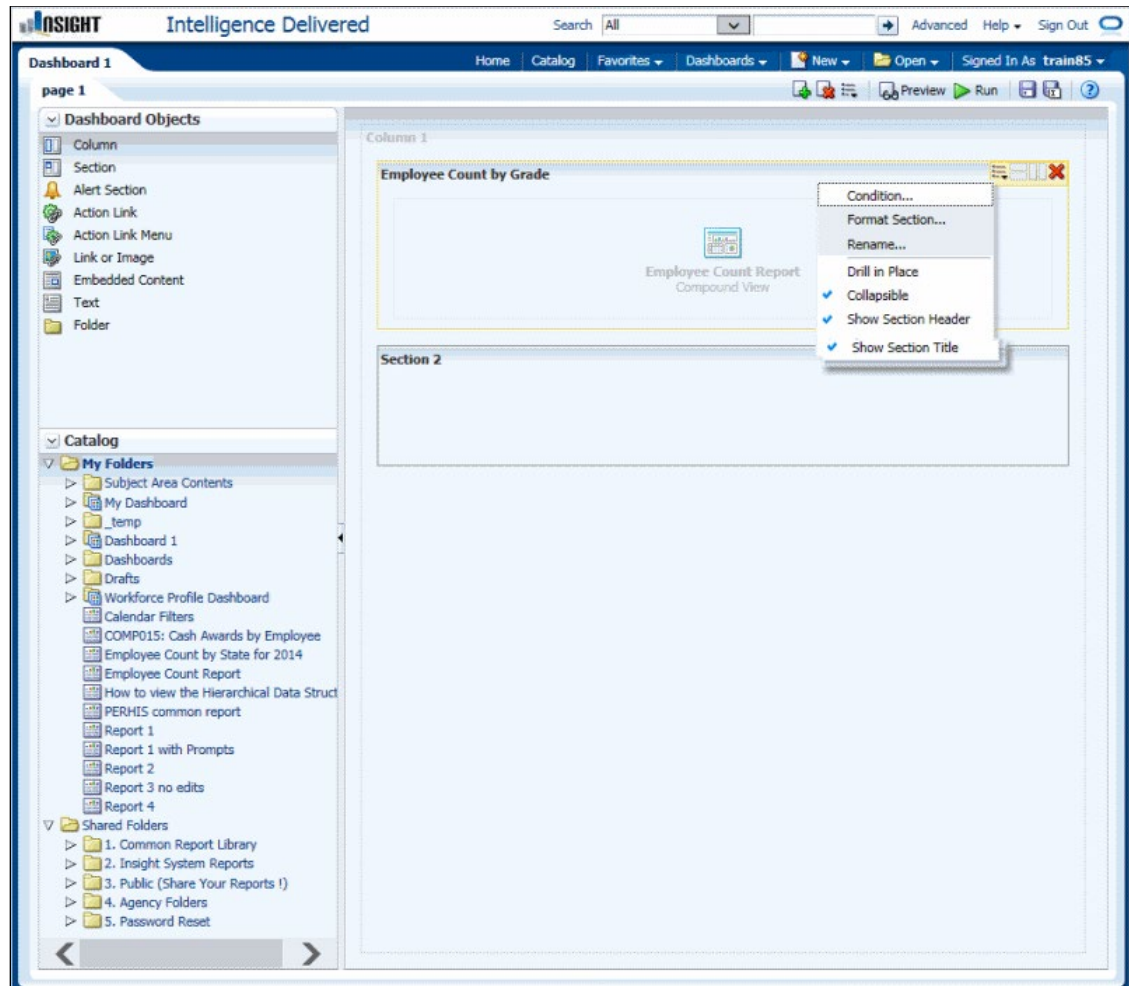


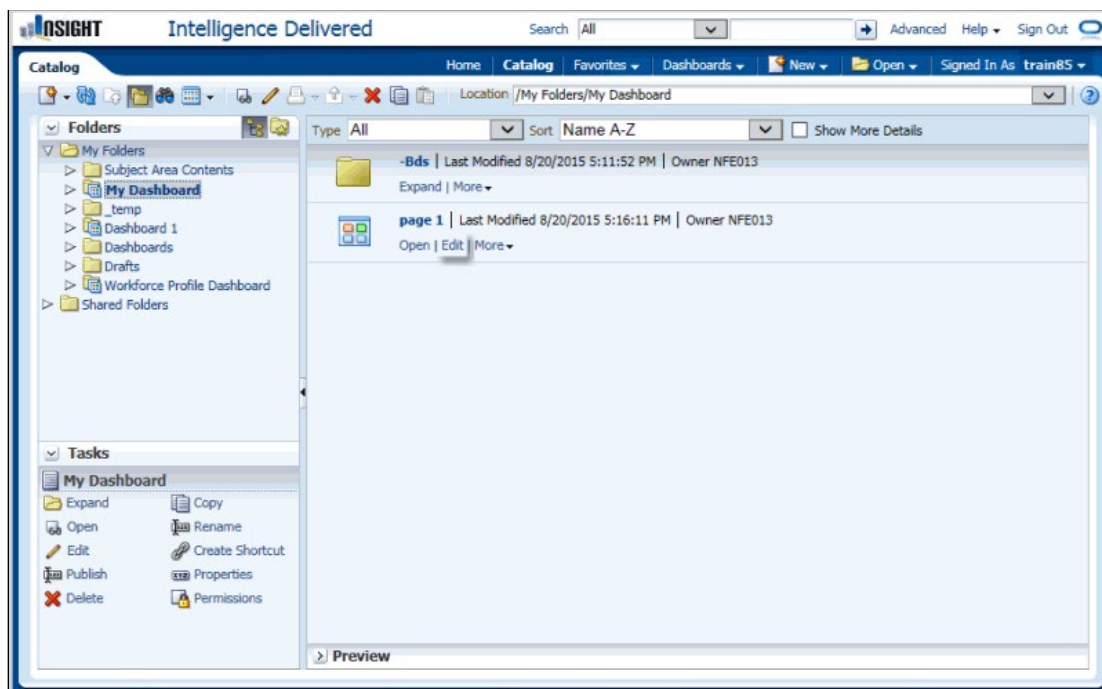
Figure 84: Edit Icon with Show Section Title Option

## Adding Dashboard Prompts to a Dashboard

### To Add Dashboards Prompts to a Dashboard:

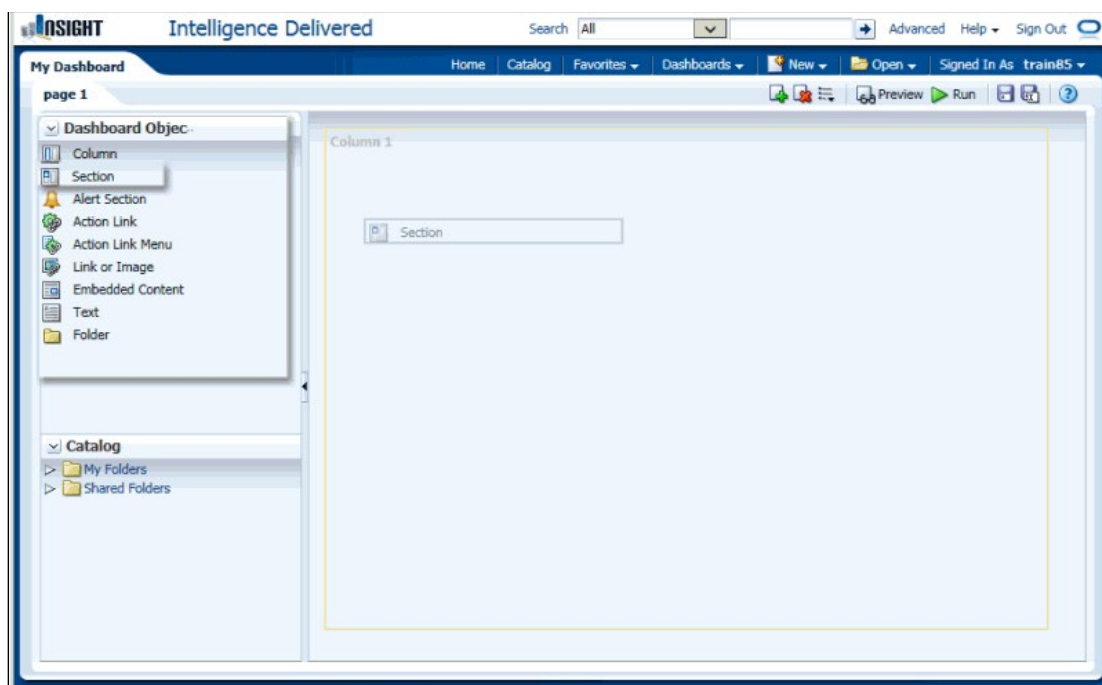
1. Navigate to the dashboard pane which will be impacted by the dashboard prompt in the **Catalog**.
2. Select **Edit** action link for the desired dashboard. The applicable dashboard is displayed.





**Figure 85: Dashboard With Edit Action Link**

3. From the saved dashboard prompt, drag and drop the Section to the Column 1 pane.



**Figure 86: Dashboard Objects Pane**

4. Drag and drop the dashboard prompt to the desired location in the dashboard.

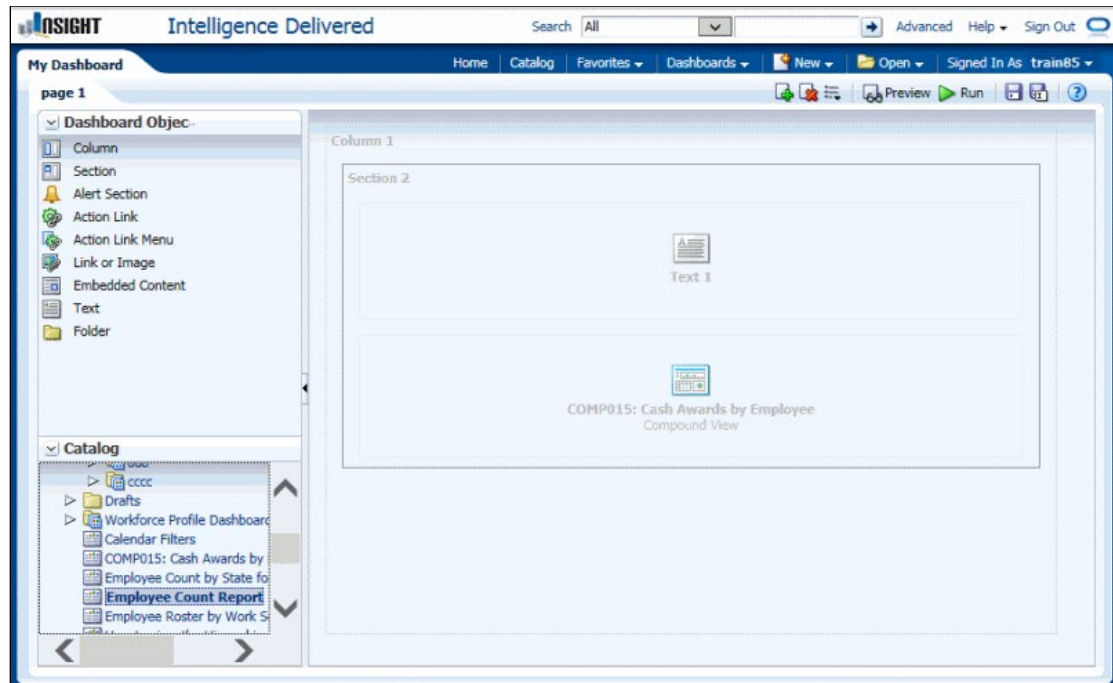


Figure 87: Dashboard Workspace With Prompt

5. Select **Save** icon to save changes before running the dashboard.

## Creating an Ad Hoc Dashboard

There are two main reasons why users would create an ad hoc dashboard:

- If the user has multiple reports that answer the same business question.
- If the user runs the same group of reports on a recurring basis, the user may want to create multiple dashboard pages that contain similar reports to better organize information.

### To Create an Ad Hoc Dashboard:

1. Select **New** action link from the top navigation bar.





Select *My Dashboard*. The Home Page with the Dashboard is displayed.

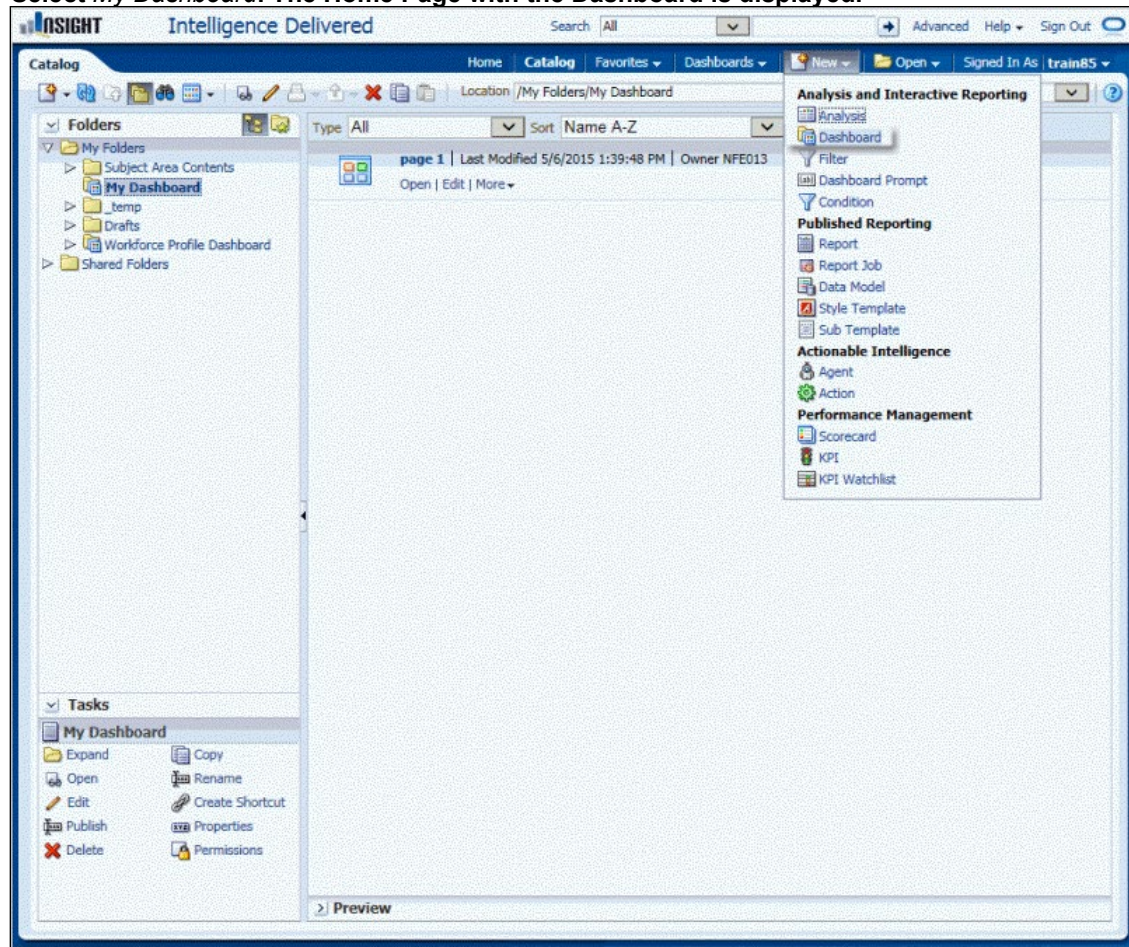
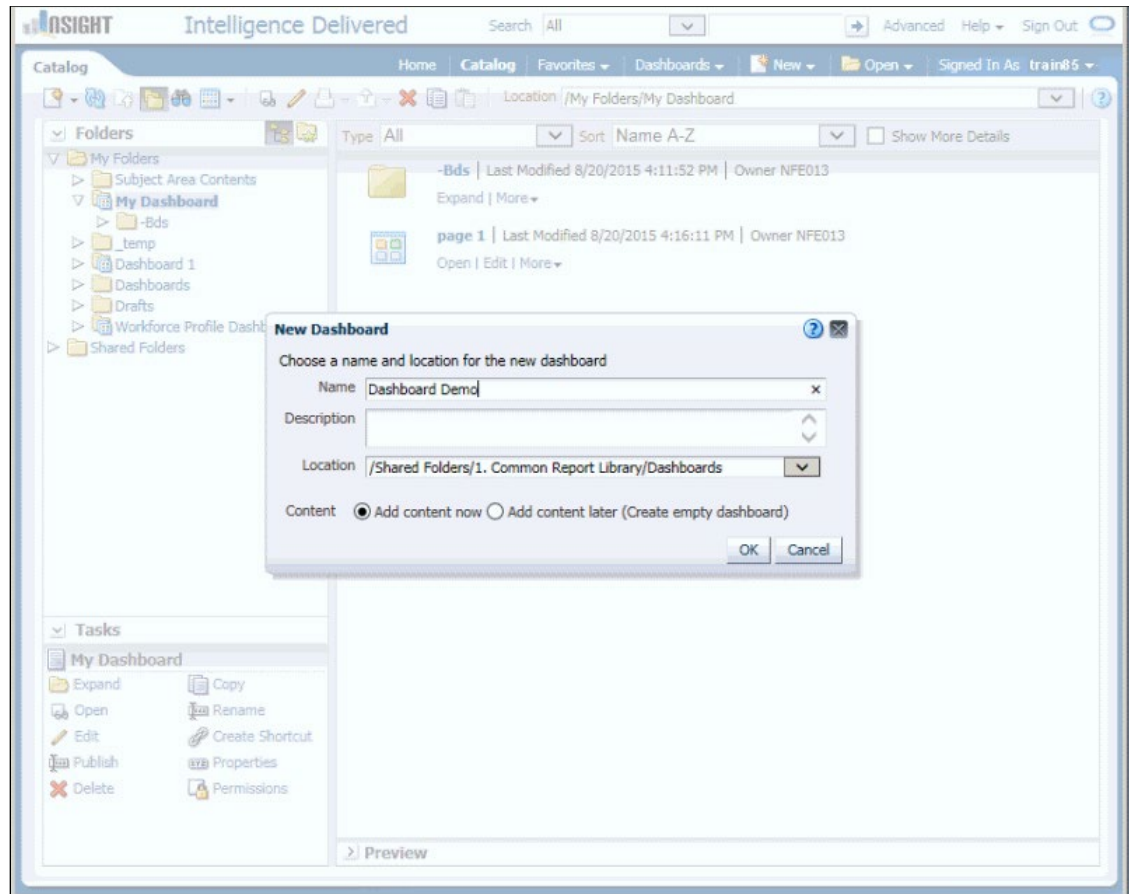


Figure 88: Home Page with Dashboard

2. Use the New Dashboard popup to define a custom name for the dashboard and save it to a defined location.



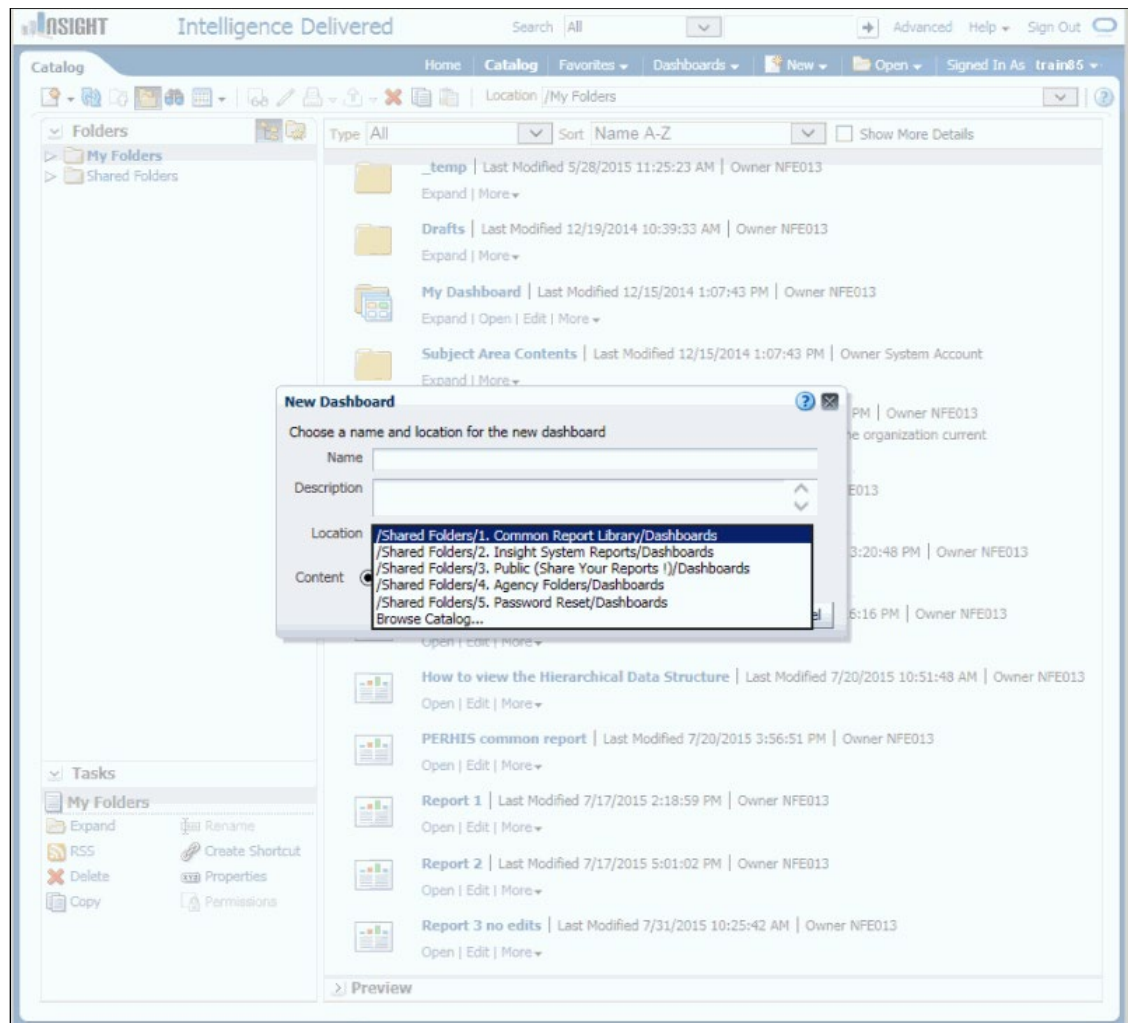
**Figure 89: New Dashboard Popup With Name and Location**

3. Select the desired location from the Location drop down.



OR

Select **Browse Catalog** for more options.



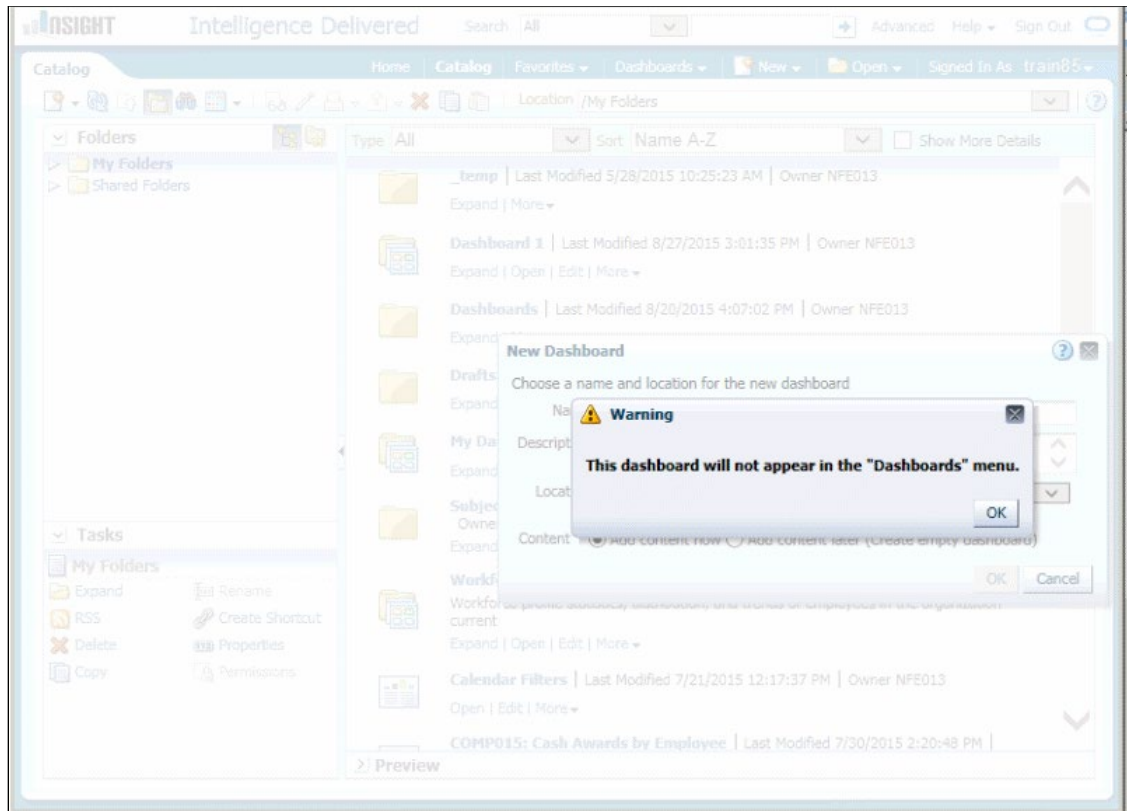
**Figure 90: New Dashboard Window with the Location Drop-Down Menu Option**

Note: It's recommended to complete the description when creating a new dashboard.

4. Select the location.

Note: A warning message appears when creating a dashboard in My Folders: *This dashboard will not appear in the "Dashboards" menu.*

5. Select **OK**.



**Figure 91: New Dashboard Warning Notification**

Note: Users must navigate to the appropriate saved folder within the Catalog to access a previously saved ad hoc dashboard instead of selecting on the Dashboard menu from the top navigation bar.





# Navigating in Insight

## Catalog Page

The Catalog provides access to My Folders and Shared Folders containing a library of saved reports and dashboards, including pre-built reports in the Common Report Library. From the Catalog, users can open common reports, as well as edit and save them to My Folders for customized use. All common reports and any saved ad hoc reports are all available through the Catalog. The user can also access a number of additional edit, print, or export functions directly from the Catalog.

**My Folders:** Access personal folders, reports, or files.

**Shared Folders:** Access folders, reports, or files available to multiple users.

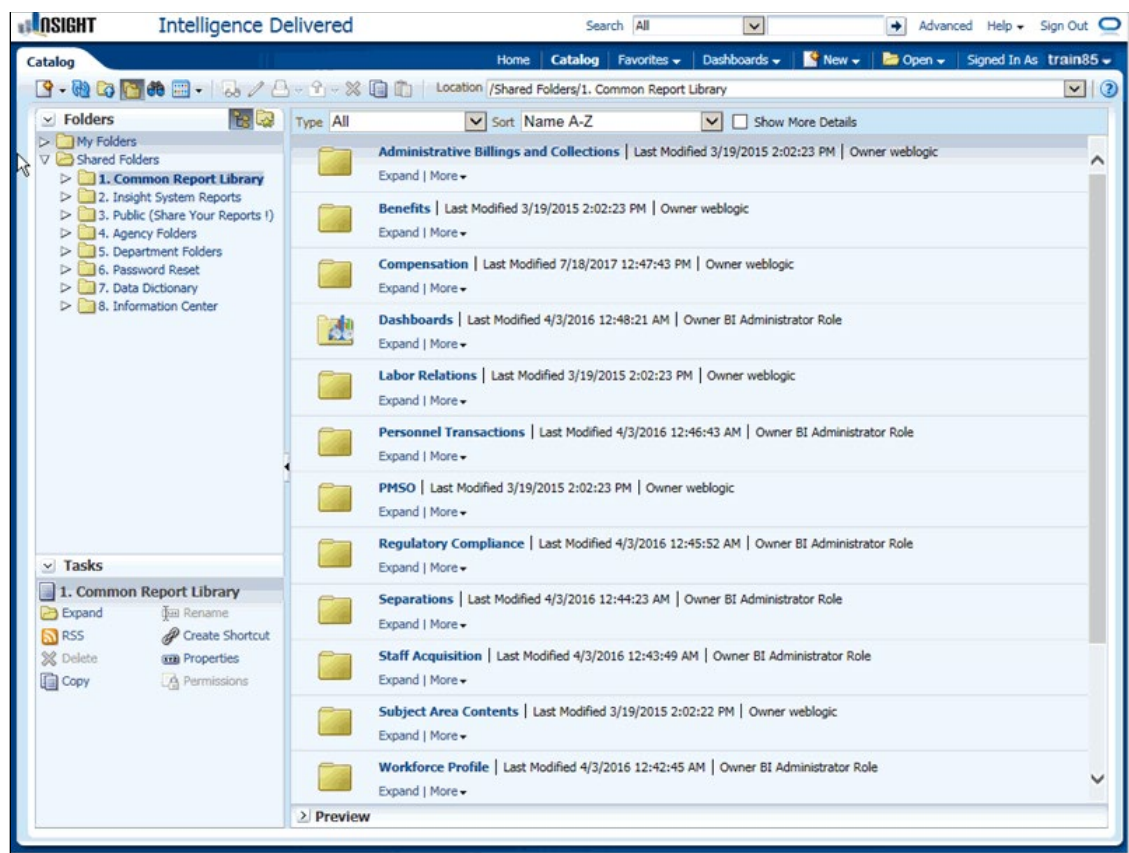


Figure 92: Folders Pane



## Catalog View

The Catalog view may be manipulated by using the **Type** or **Sort** filters to change how and what items are displayed.

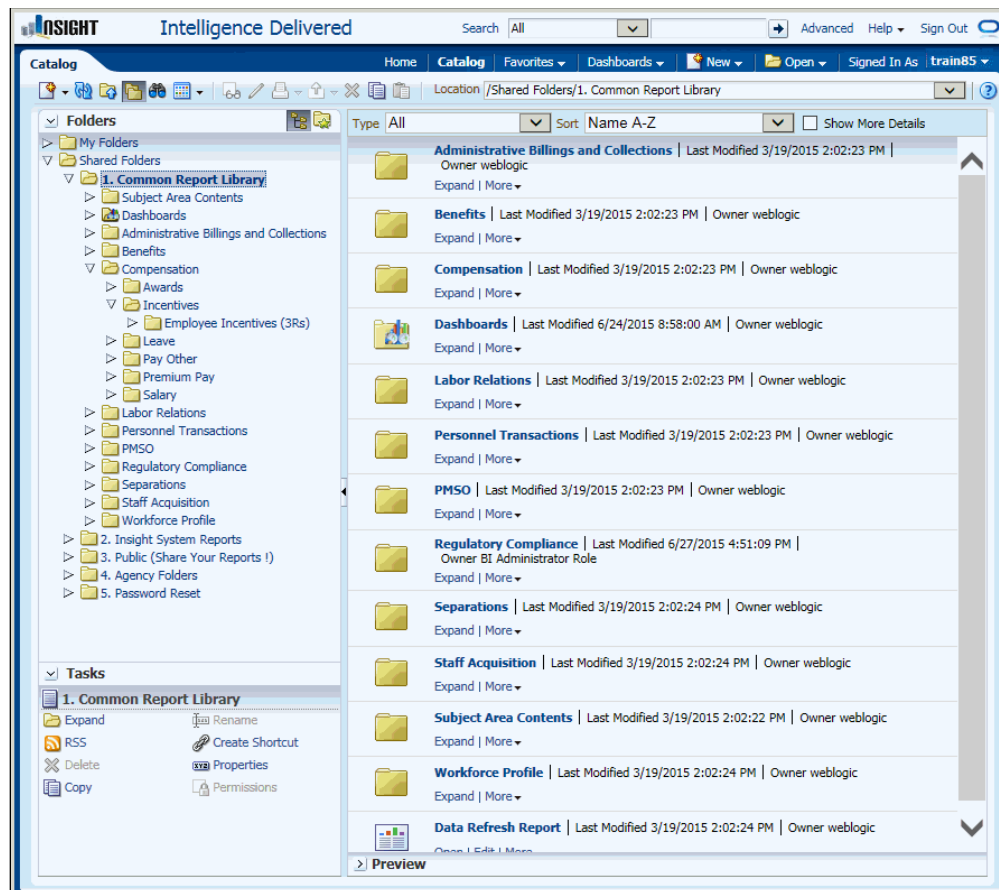


Figure 93: Type and Sort Options in the Catalog

### To Use the Catalog View:

1. Select the **Type** drop down to filter the Catalog to a certain type of item (e.g., Analysis (Report) or Dashboard). The Type drop down is displayed with a list of valid values.

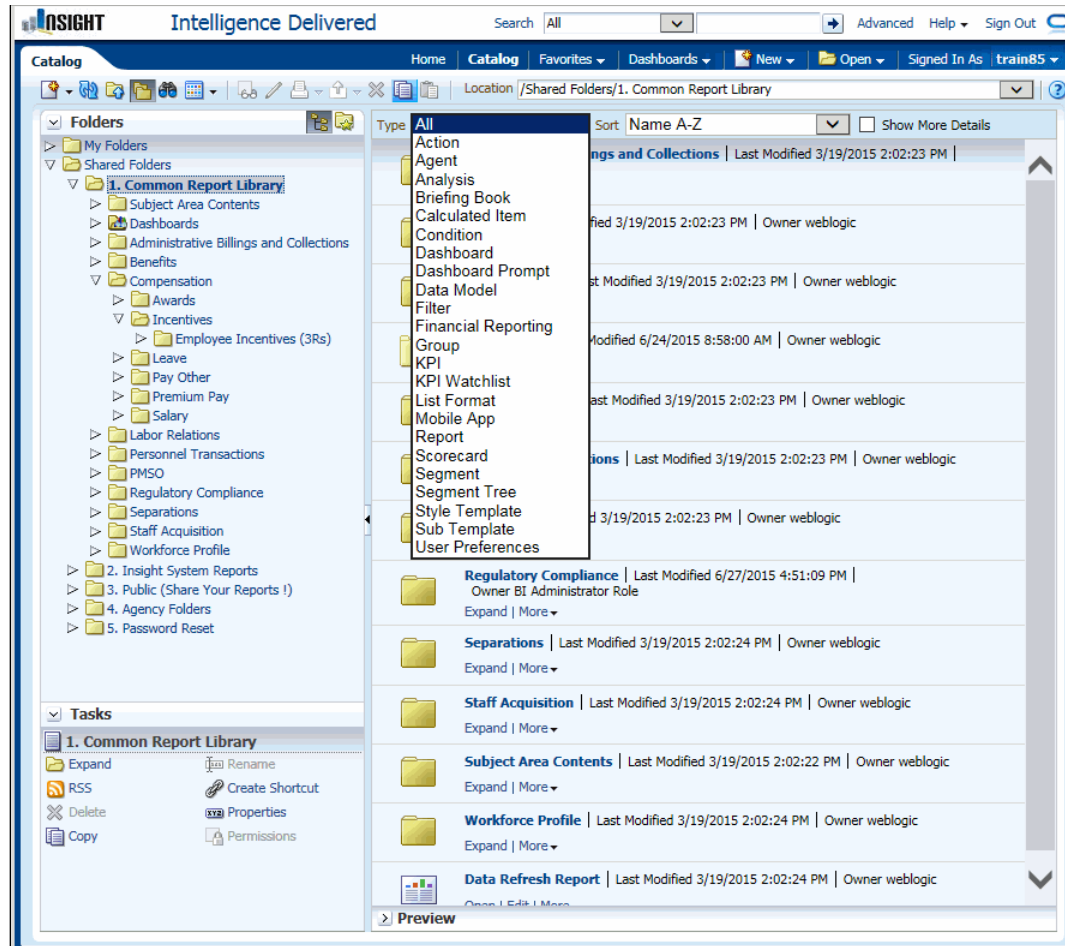


Figure 94: Type Drop-Down Menu in the Catalog

Note: Reset the catalog to the default views of all items by selecting **All** from the **Type** menu.

2. Select the **Sort** drop down to sort the way data is displayed (e.g., ascending or descending).

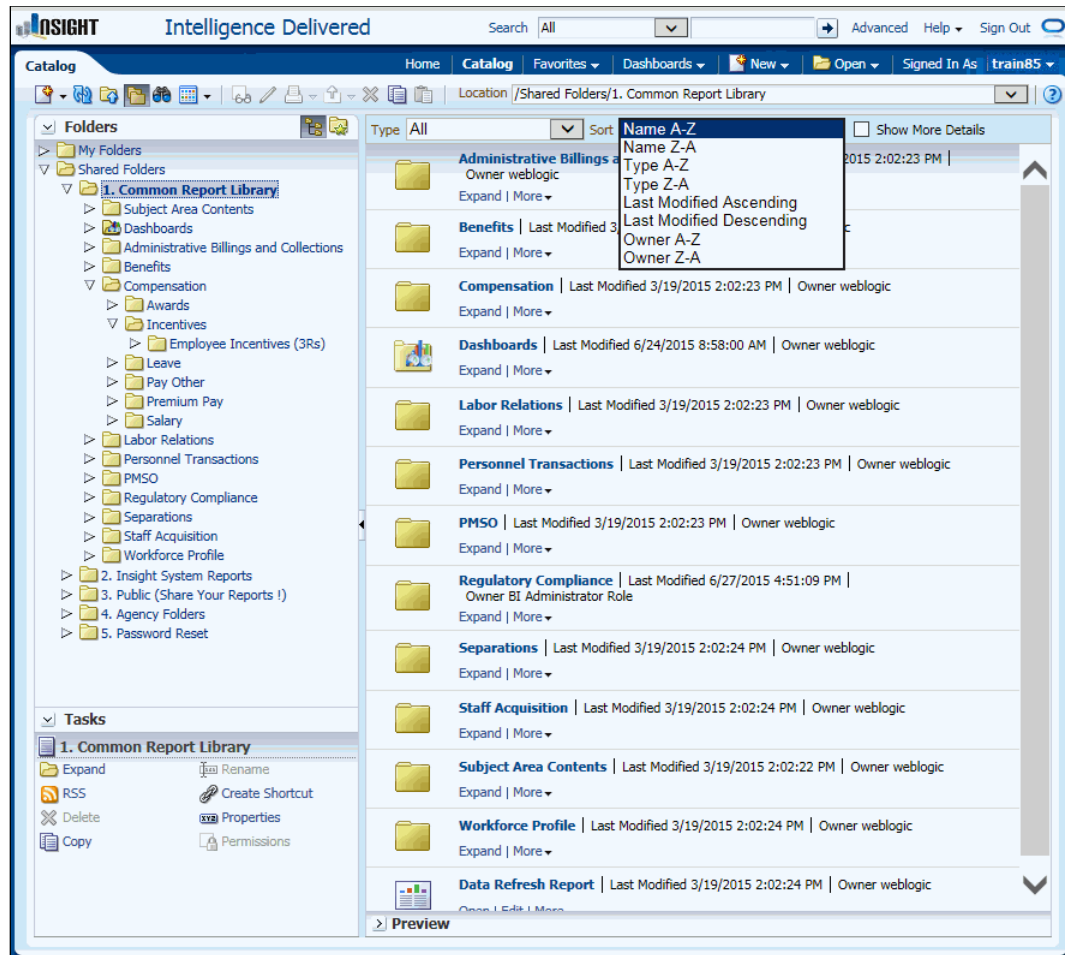


Figure 95: Sort Drop-Down Menu on the Catalog Page

## Catalog Action Links

Action links are located directly below the report or dashboard. The action links are a shortcut to a number of tasks.

Dashboards have multiple components (e.g., reports and prompts). Because of this, when users access dashboards from the Catalog, they will view a folder which can be expanded to see the individual items.





To run the full dashboard, select **Dashboards** folder in the Folder pane and select the **Open** action link for the desired dashboard from the view pane.

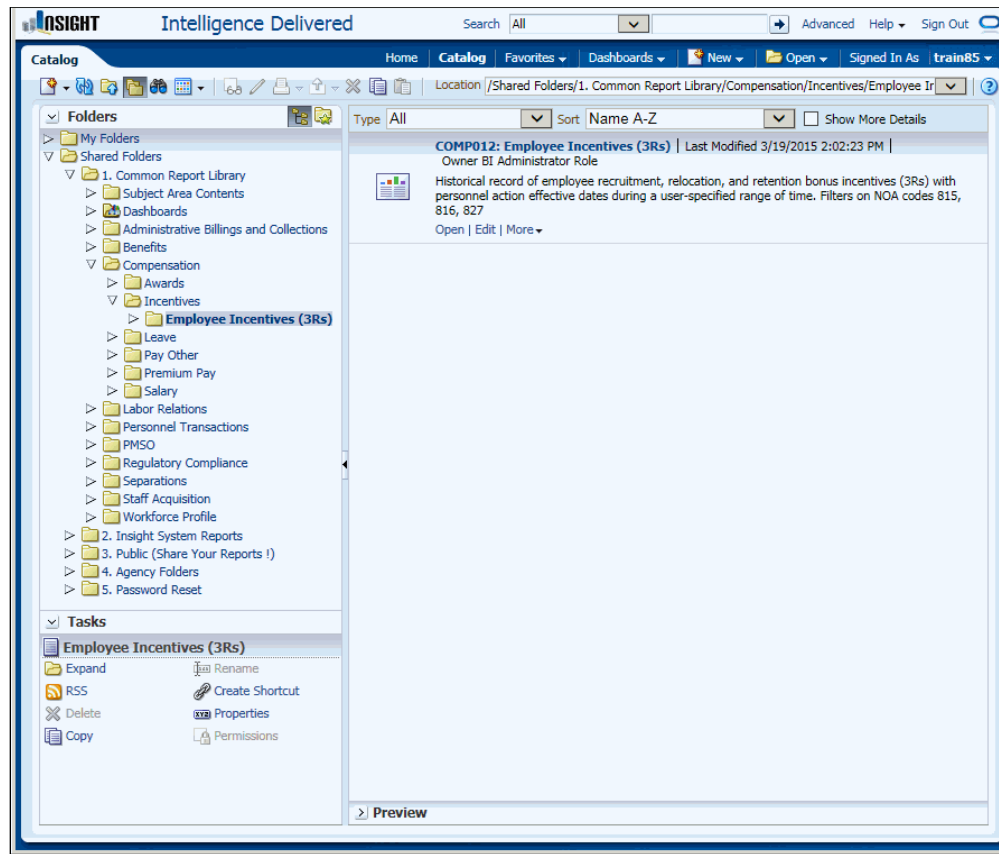


Figure 96: Action Links

#### To Use the Catalog Action Links:

1. To run the full dashboard, select the **Dashboards** folder in the Folder pane.
2. Select the **Open** action link for the desired dashboard from the view pane.

#### Action Links under each Report or Dashboard

The following links are available under each report for dashboard:

Action Links under each Report or Dashboard	Description
<b>Open</b>	Directs users to a new page that runs the report.
<b>Edit</b>	Directs users to the ad hoc report editing page to edit the structure and/or appearance of the report.



Action Links under each Report or Dashboard	Description
<b>More</b>	Provides a list of additional options including Print, Export, Schedule and Add to Favorites, etc.

### Options within the More Action Link

The following options are available within the more action link:

Option	Description
<b>Print</b>	Provides a variety of options to print a report to simplify sharing information. <ul style="list-style-type: none"><li>• Printable PDF</li><li>• Printable HTML.</li></ul>
<b>Export</b>	Provides a variety of options to export a report to simplify sharing information. <ul style="list-style-type: none"><li>• PDF</li><li>• Excel</li><li>• PowerPoint</li><li>• Web Archive</li><li>• Data</li></ul>
<b>Schedule</b>	Defines the frequency, start, and end time of the agent.
<b>Copy</b>	Provides a copy of a selected object or folder to paste in another directory.
<b>Add to Favorites</b>	Provides a way to add the selected object to your Favorites list. A favorite objects icon appears with a gold star overlay.
<b>Create Shortcut</b>	Provides a way to create a shortcut to the object or folder.  <hr/> <p>Note: When users create a shortcut, Oracle BI EE adds the shortcut to the current folder. Users can then move this shortcut to another location within the catalog.</p> <hr/>



Option	Description
<b>Properties</b>	Used to view or modify the selected object's properties.
	Note: When this option is selected, the Properties dialog displays.
	Displays a menu of options to format a component of a report or dashboard.

## Creating an Ad Hoc Report

### To Create an Ad Hoc Report:

1. Select the **New** action link from the top navigation bar.
2. Select **Analysis**. The Analysis and Interactive Reporting options are displayed.

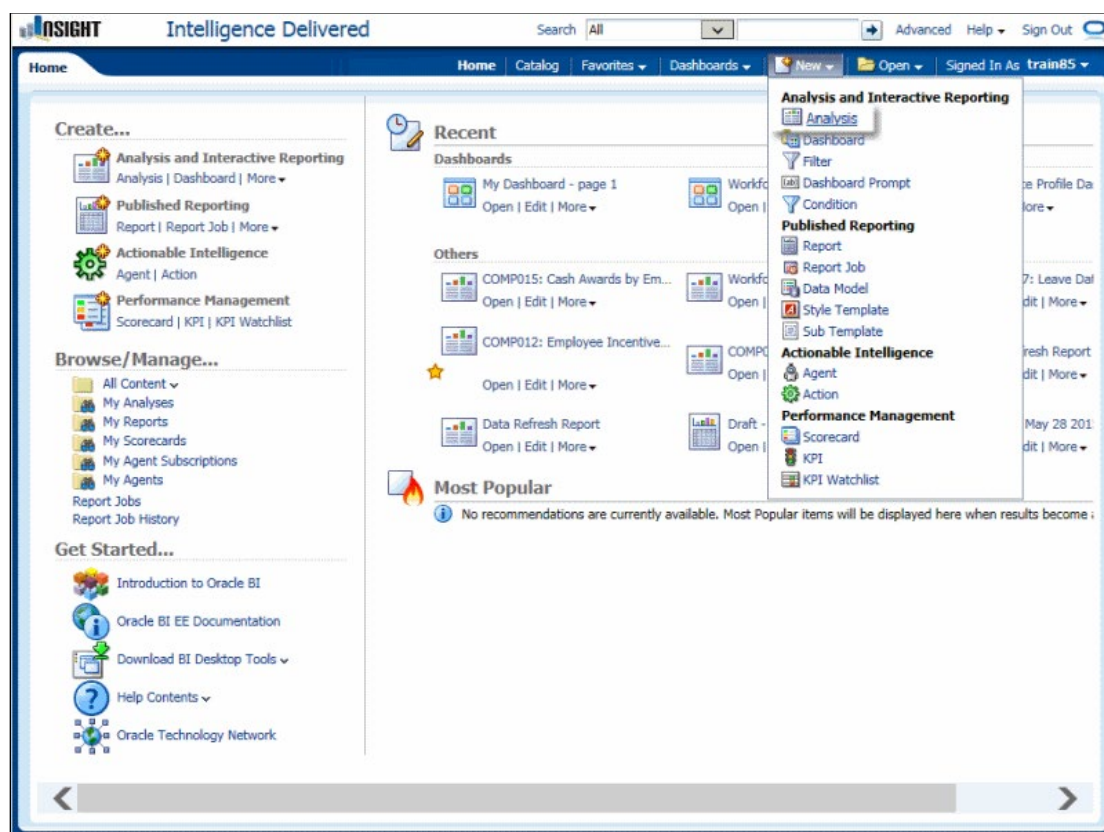


Figure 97: Analysis and Interactive Reporting Options



3. Select the desired **Subject Area** for the ad hoc report. The Selected Subject Area listing is displayed.

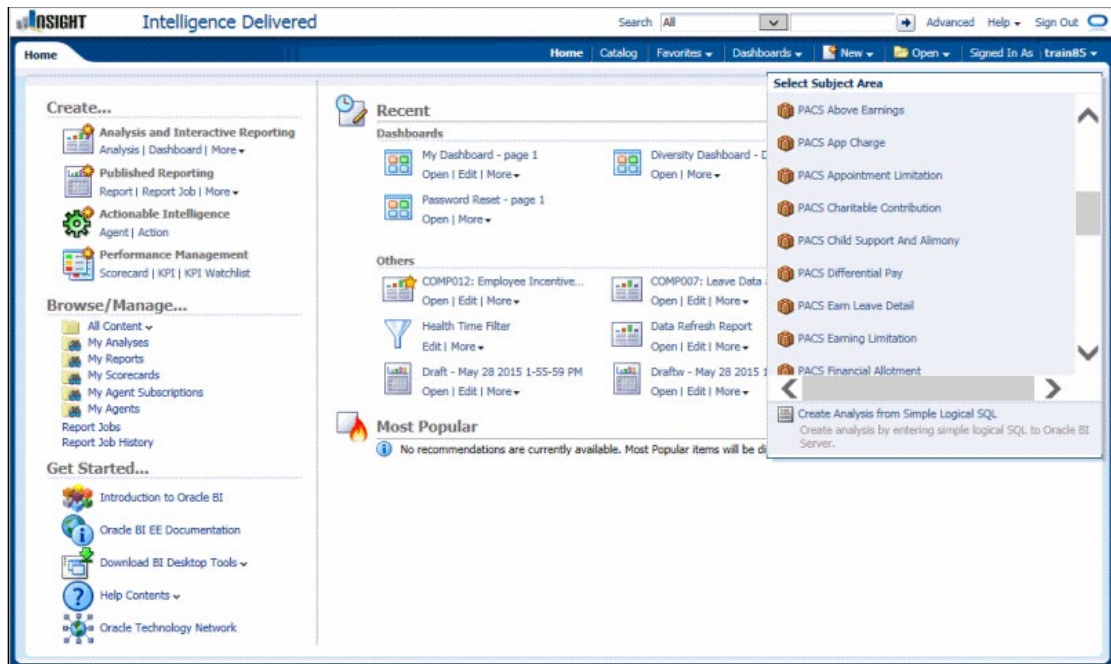


Figure 98: Subject Area Drop-Down Menu

4. View the applicable ad hoc report editing page with "Untitled" in the top left tab.

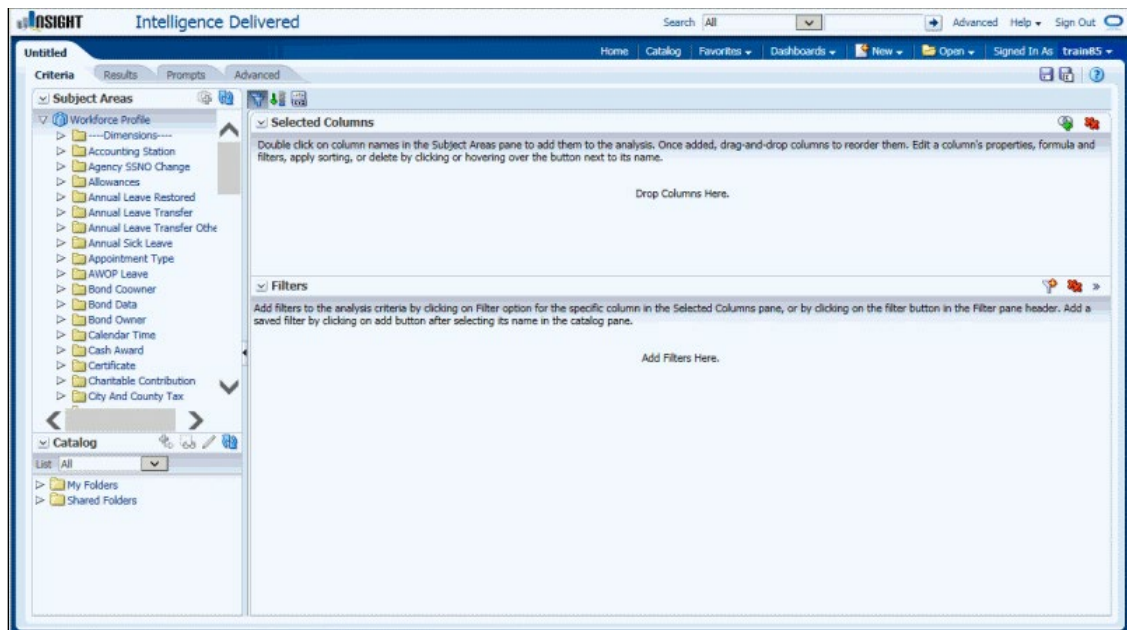


Figure 99: Ad Hoc Report Showing Untitled Tab



## Adding Data Elements

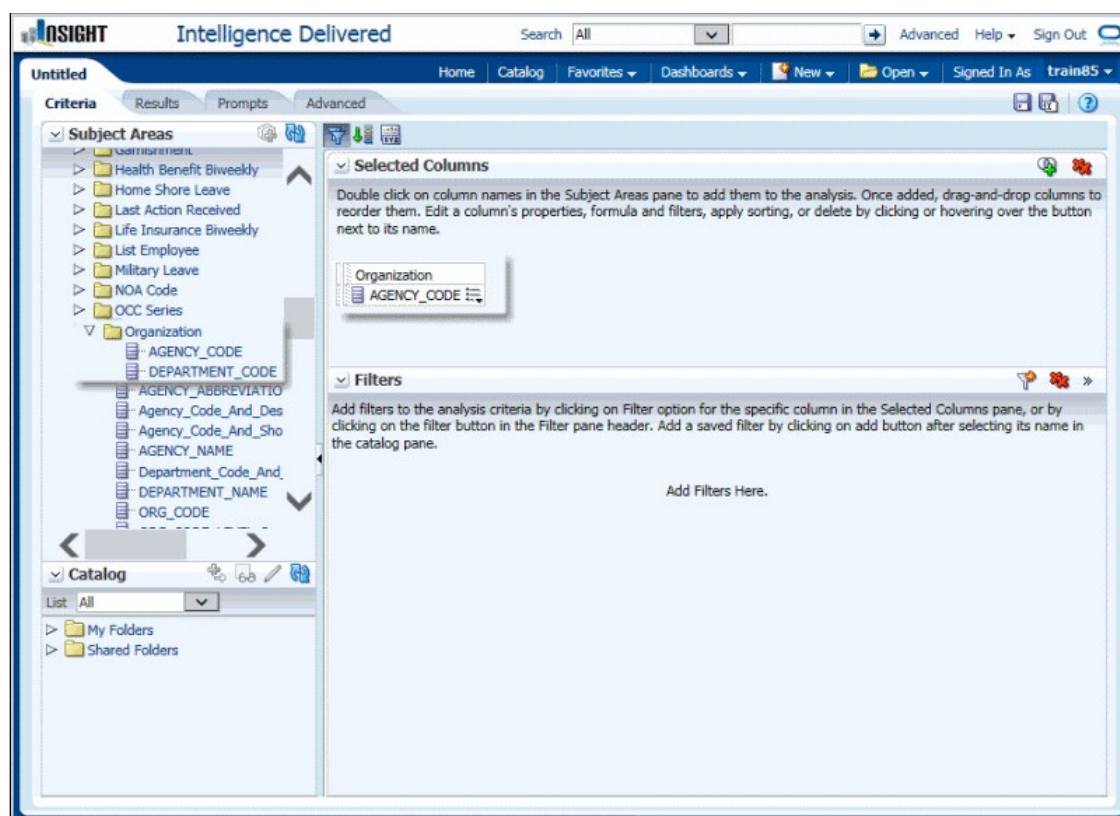
Users can create an ad hoc report with the data elements available based on the user role. Creating a report is as simple as selecting the data elements and dragging them to the working area for additional editing.

### To Add Data Elements:

1. Double-click data elements to move the data element to the Selected Columns pane.

OR

Navigate to the Criteria tab to drag and drop data elements from the Subject Areas pane to the **Selected Columns** pane.



**Figure 100: Drag and Drop Data Elements From the Subject Areas Pane**

Note: For additional information about data elements, use the Insight Data Dictionary for definitions and folder locations. For the current version of the Data Dictionary go to the Insight website located on the NFC Home Page,

[https://www.nfc.usda.gov/ClientServices/HR\\_Payroll/Initiatives/Insight/Resource\\_Materials.php](https://www.nfc.usda.gov/ClientServices/HR_Payroll/Initiatives/Insight/Resource_Materials.php).



Note: In order for reports to contain numerical values for totals, graphs, etc., users must include a measure data element (e.g., Employee Count) as one of the data elements in the Selected Columns pane.

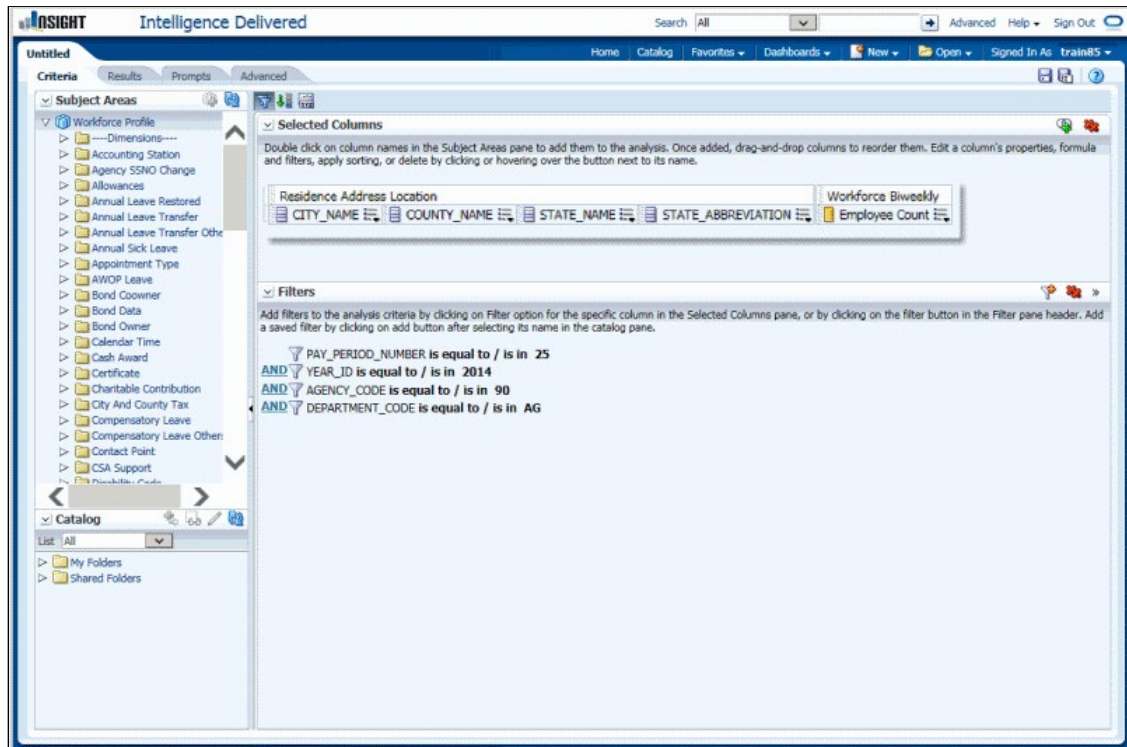


Figure 101: Data Elements Listed in the Selected Columns Pane

## Manipulating a Report

Once the report is run, the user may make simple modifications to change how the report is structured. Modify data elements in reports by using the handlebar or by right-clicking on a column heading.

There are two methods for restricting data in the run view of a report:

- Section: Results in several tables separated by the individual values of the data element.
- Table Prompts: Creates a drop-down menu that restricts the data in the table based on the selected value.

### To Manipulate a Report in the Run View:

1. To access the handlebar, hover over a data element column heading and manipulate the report structure.





OR

Right-click on the data element column heading to view a menu of customization options.

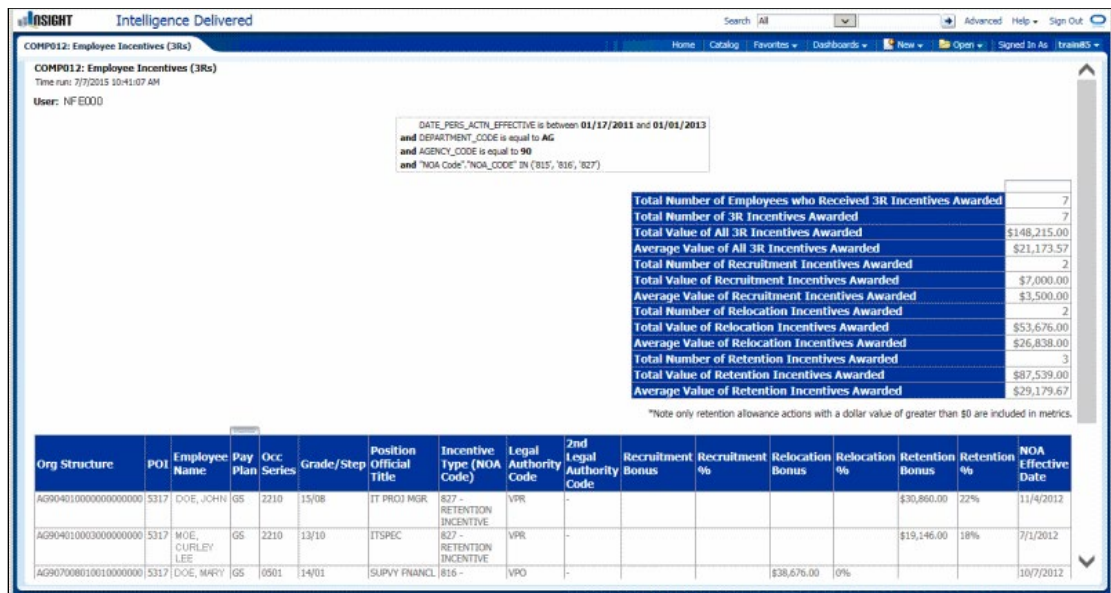


Figure 102: Hover on Column to Access the Handlebar

2. Drag and drop the highlighted handlebar left or right to change the order of the data element columns. Once the cursor changes into a four-arrow cursor the user can drag and drop the data element column.

Note: The highlighted bar will indicate the new position of the column in the report. Use this to guide where to drag and drop the data element column.

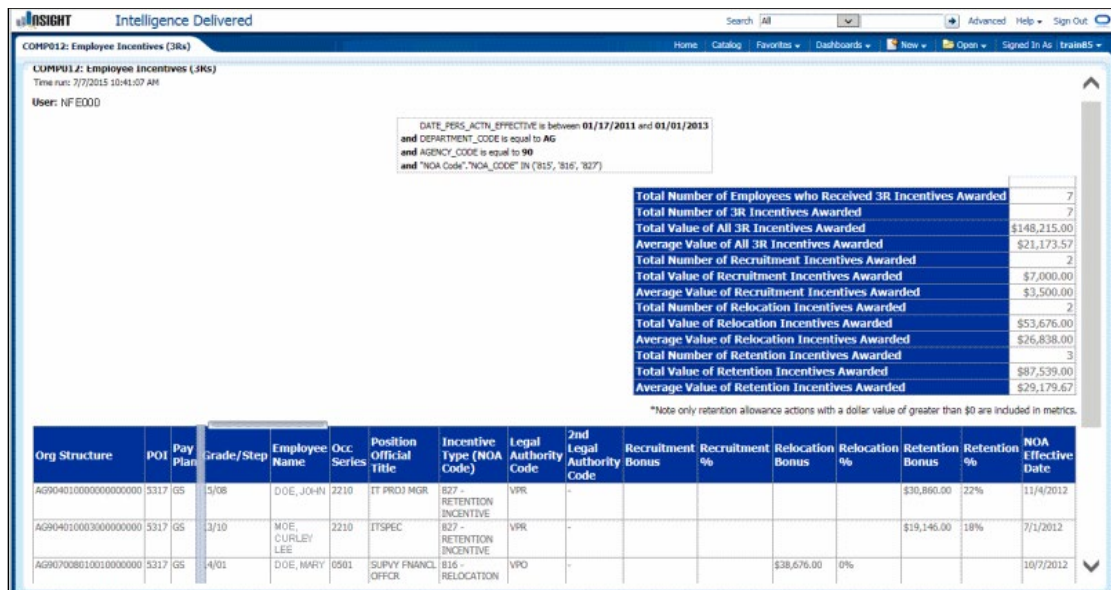


Figure 103: Gray Handlebar With Light Blue Bar Indicator



### 3. Drag the column up to create a new Section or Table Prompt.

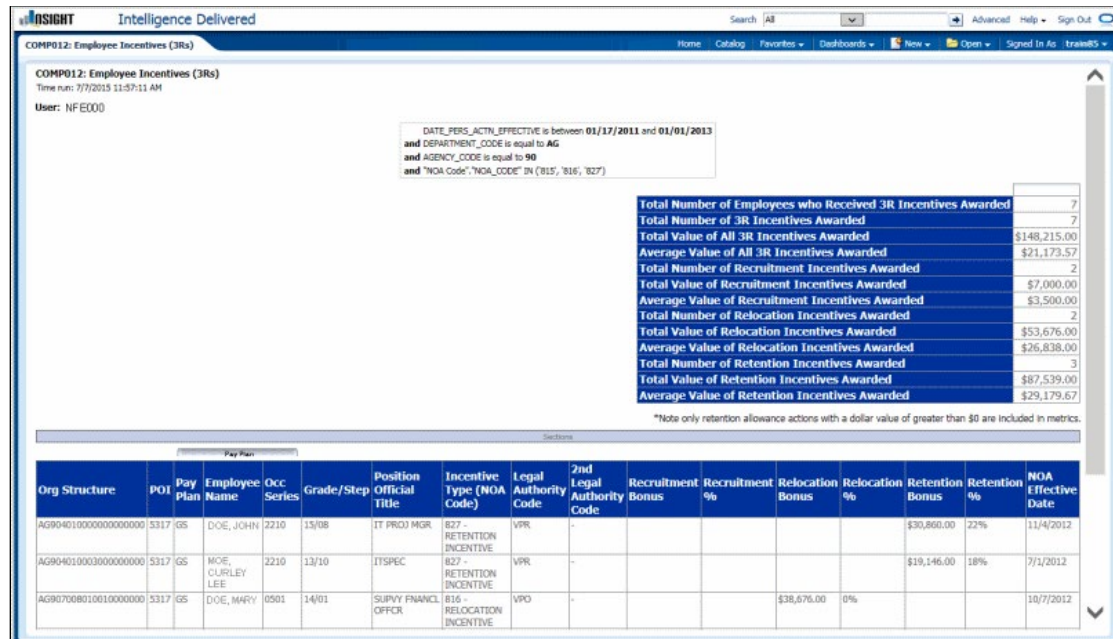


Figure 104: Sections Blue Bar Indicator in Report

- Section - Results in several tables separated by the individual values of the data element.

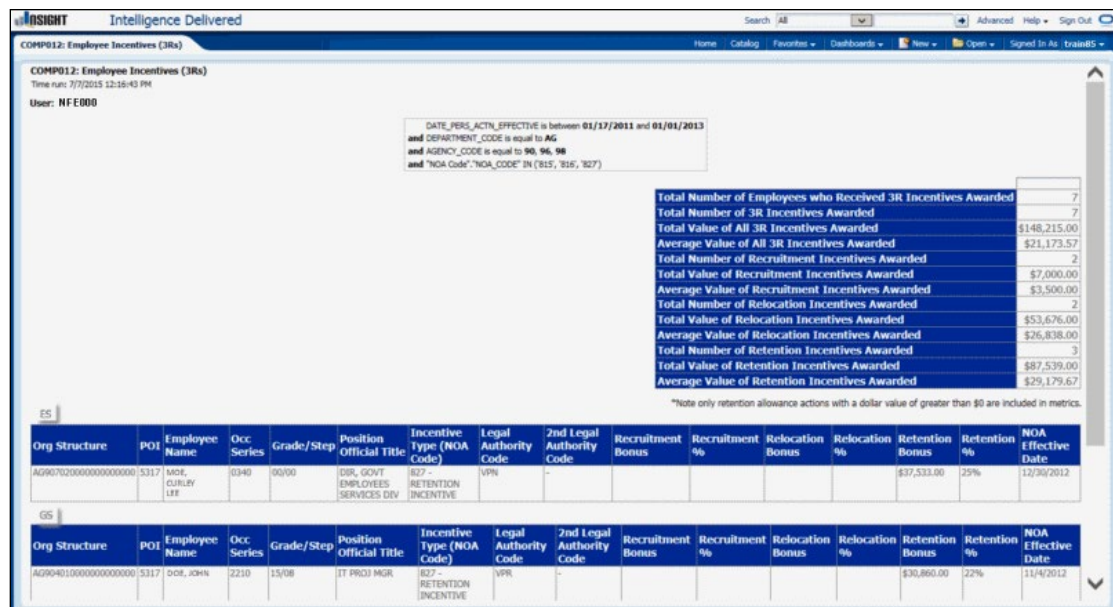


Figure 105: Table Sections in Report

- Table Prompts - Creates a drop-down menu that restricts the data in the table based on the selected value.



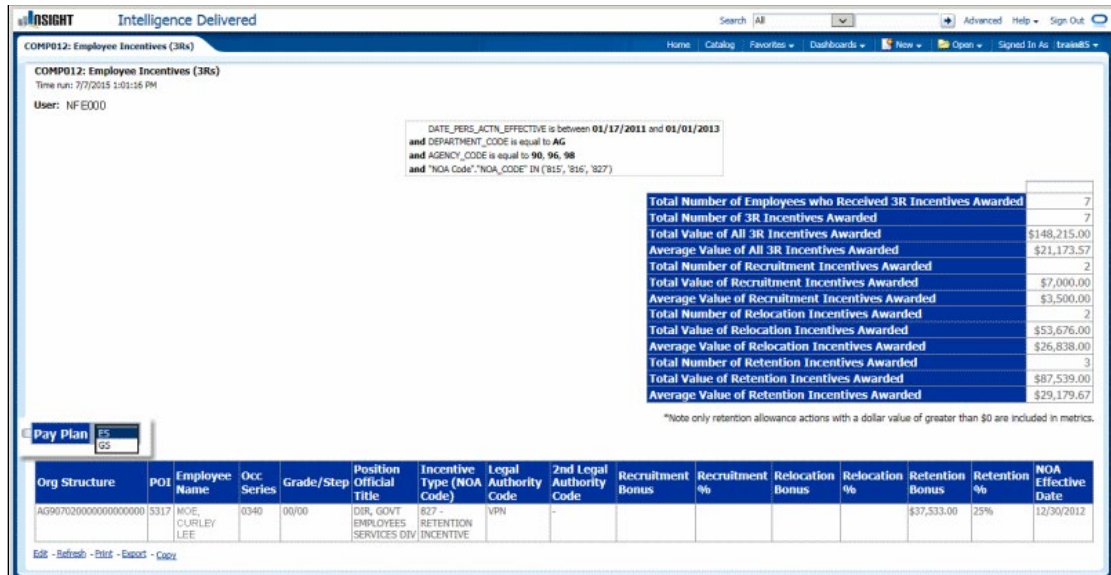


Figure 106: Table Prompts in a Report

- To return the data element from Section or Table Prompts back to the table, hover over the data element name and drag the handlebar to the report table.



Figure 107: Remove Section or Table Prompts



OR

Right-click on a column header to view a menu of options allowing users to customize report structure.

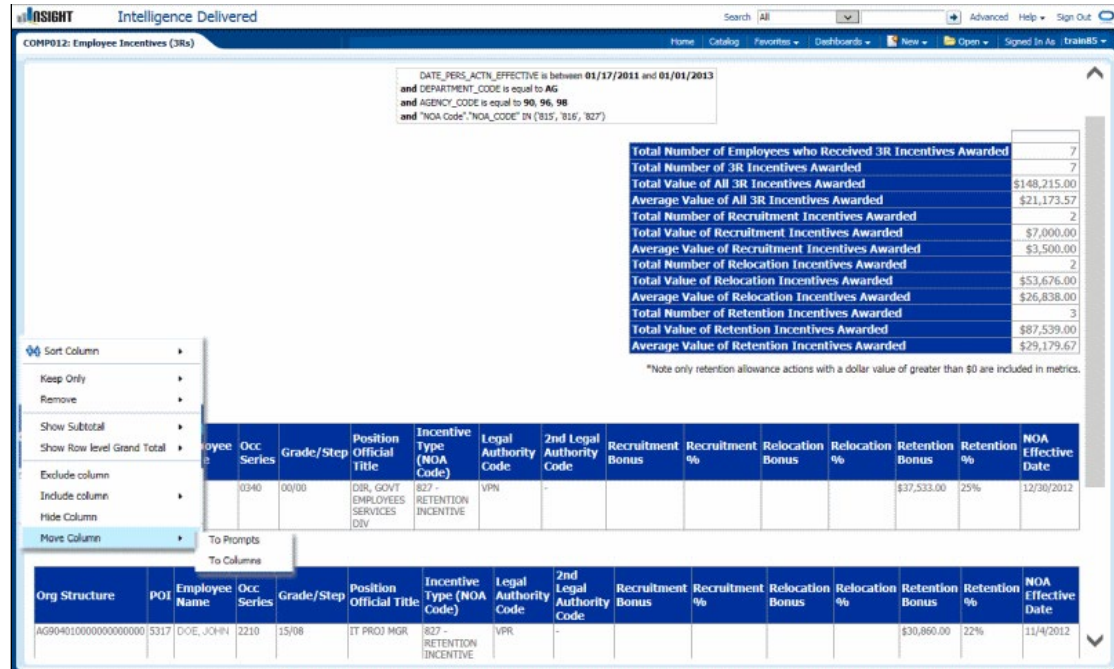


Figure 108: Column Header Drop-Down Menu

To customize the report structure in the run view, right-click on a column header to access a menu of options.

- **Sort Column**—Sorts the data in ascending or descending order.
- **Keep Only**—Chooses to only show values that meet certain criteria.
- **Remove**—Chooses to remove values that meet certain criteria.
- **Show Subtotal**—Adds a subtotal for that data element within the table.
- **Show Row Level Grand Total**—Adds a Grand Total to follow the values within the table. Default is not to include the Grand Total.
- **Include Column**—Inserts a column from the table.
- **Exclude Column**—Removes the column from the table.
- **Hide Column**—Temporarily hides the column from the table.
- **Move Column**—Changes the sequence of the columns or moves the data element into the Table Prompts or Sections position.



## Exporting a Report

Insight provides a variety of options to export a report to simplify sharing information.

Select the **Export** action link to choose from a number of export options including **PDF**, **Excel**, **PowerPoint**, **Web Archive**, or **Data**.

- Export feature requirements:
  - Java and ActiveX are required to display the File Download dialog box.
  - Popups must be allowed.
  - Maximum number of rows initially displayed by default is 500.
- File type restrictions:
  - **PDF** - Prints only what is displayed on one page. Users can elect to see all the rows by maximizing the row count displayed.
  - **Excel** - 2003 version has a limit of 65,536 rows. 2007 and 2010 versions have a limit of 1,048,576 rows. When exporting a dashboard, the report is saved in HTML where Excel will automatically position the graphs.
  - **PowerPoint** - 2003 and 2007 versions print the dashboard to multiple slides with each dashboard page on one slide.

Note: It is recommended if the report has over 50,000 rows, export to a CSV to decrease the size of the file.

DATE\_PERS\_ACTN\_EFFECTIVE is between 01/17/2011 and 01/01/2013  
and DEPARTMENT\_CODE is equal to AG  
and AGENCY\_CODE is equal to 90, 96, 98  
and "NOA Code"."NOA\_CODE" IN ('815', '816', '827')

Total Number of Employees who Received 3R Incentives Awarded	7
Total Number of 3R Incentives Awarded	7
Total Value of All 3R Incentives Awarded	\$148,215.00
Average Value of All 3R Incentives Awarded	\$21,173.57
Total Number of Recruitment Incentives Awarded	2
Total Value of Recruitment Incentives Awarded	\$7,000.00
Average Value of Recruitment Incentives Awarded	\$3,500.00
Total Number of Relocation Incentives Awarded	2
Total Value of Relocation Incentives Awarded	\$53,676.00
Average Value of Relocation Incentives Awarded	\$26,838.00
Total Number of Retention Incentives Awarded	3
Total Value of Retention Incentives Awarded	\$87,539.00
Average Value of Retention Incentives Awarded	\$29,179.67

\*Note only retention allowance actions with a dollar value of greater than \$0 are included in metrics.

Org Structure	OCC Series	Grade/Step	Position Official Title	Incentive Type (NOA Code)	Legal Authority Code	2nd Legal Authority Code	Recruitment Bonus	Recruitment %	Relocation Bonus	Relocation %	Retention Bonus	Retention %	NOA Effective Date
AG9070200000	0340	00/00	IDR, GOVT EMPLOYEES SERVICES DIV	827 - RETENTION INCENTIVE	VPN	-					\$37,533.00	25%	12/30/2012

PDF, Excel, Powerpoint, Web Archive (.mht), Data

Figure 109: Export Action Link Drop-Down Menu



## Reformatting Excel Exports

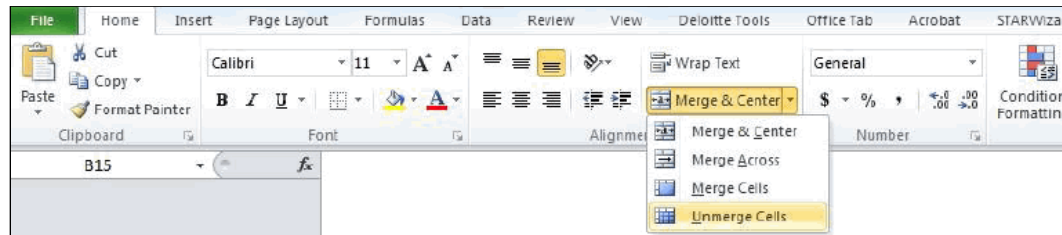
To Reformat Excel Exports:

1. In Excel 2003, delete the footer in the exported report.

**OR**

In Excel 2007, select the **CTRL + A** on the keyboard.

2. Select the **Merge & Center** drop-down menu.
3. Select the **Unmerge Cells**.



**Figure 110: Excel Merge and Center Options**

4. Select the **Edit** icon in the selected Columns Pane.
5. Using compatibility mode in IE11:
  - Open an Internet Explorer browser page.
  - Press **F12** on the keyboard.
  - Press **Ctrl + 8** on the keyboard simultaneously to navigate to the Emulation tab.
  - Select **10** from the Document Mode drop-down menu.
  - Select **Internet Explorer 10** from the User Agent String drop-down menu.
  - Wait a moment until your screen refreshes.
  - Select **F12** again to close the Developer pane.

## Printing Reports

Insight provides a variety of options to print a report to simplify sharing information.

To Print Reports:

1. Select the **Print** action link.



## 2. Choose from **Printable PDF** or **Printable HTML**.

**COMP012: Employee Incentives (3Rs)**  
Time run: 7/7/2015 1:01:16 PM  
User: NFE000

DATE\_PERS\_ACTN\_EFFECTIVE is between 01/17/2011 and 01/01/2013  
and DEPARTMENT\_CODE is equal to AG  
and AGENCY\_CODE is equal to 90, 96, 98  
and "NOA Code"."NOA\_CODE" IN ('815', '816', '827')

Total Number of Employees who Received 3R Incentives Awarded	7
Total Number of 3R Incentives Awarded	7
Total Value of All 3R Incentives Awarded	\$148,215.00
Average Value of All 3R Incentives Awarded	\$21,173.57
Total Number of Recruitment Incentives Awarded	2
Total Value of Recruitment Incentives Awarded	\$7,000.00
Average Value of Recruitment Incentives Awarded	\$3,500.00
Total Number of Relocation Incentives Awarded	2
Total Value of Relocation Incentives Awarded	\$53,676.00
Average Value of Relocation Incentives Awarded	\$26,838.00
Total Number of Retention Incentives Awarded	3
Total Value of Retention Incentives Awarded	\$87,539.00
Average Value of Retention Incentives Awarded	\$29,179.67

\*Note only retention allowance actions with a dollar value of greater than \$0 are included in metrics.

Pay Plan ES

Org Structure	POI	Employee Name	Occ Series	Grade/Step	Position Official Title	Incentive Type (NOA Code)	Legal Authority Code	2nd Legal Authority Code	Recruitment Bonus	Recruitment %	Relocation Bonus	Relocation %	Retention Bonus	Retention %	NOA Effective Date
AG907020		XXXXXXXXXXXXXXXXXXXXX	0340	00/00	DIR, GOVT EMPLOYEES SERVICES DIV	827 - RETENTION INCENTIVE	VPN	-					\$37,533.00	25%	12/30/2012

Printable PDF  
Printable HTML

Edit - Refresh - Print - Export - Copy

Figure 111: Print Action Link Drop-Down Menu

Note: To open/print a PDF, users must have Adobe Reader installed.

## Sorting Feature

The Criteria tab is used to manipulate reports and create complex sorts.

### To Create a Complex Sort:

1. Select the **Edit** icon.
2. Select **Sort** in the selected Columns Pane.
3. Select the applicable type of sort from the **Sort** options on the menu.

Note: Repeat for additional data elements to be sorted.

The **Clear All Sorts in All Columns** is used to sort columns from a common report.

### To Clear Sort Columns from a Common report:

Select **Clear All Sorts in All Columns** from the menu of options from the **Sort** option in the menu before applying a sort.

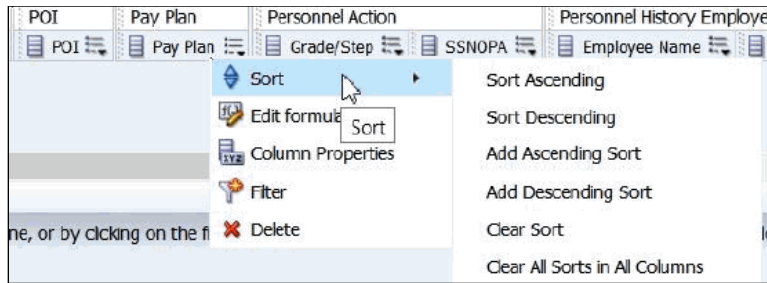


Figure 112: Sort Menu of Options

#### To Create a Basic Sort:

1. Manipulate the report in the run view.
2. Hover over the targeted column header.
3. Select the **Up** (Sort Ascending) or **Down** (Sort Descending) arrow.
4. Select the **Export** button at the bottom of the report to export to Excel.



Figure 113: Sort Arrows in the Run View

## Changing the View Displayed in the Catalog

There are several options within Insight to manipulate the Catalog view to change how items are displayed in the Catalog.

**Location** - To determine where you are within the directory structure. The Location displays the directory path of a selected object.

**Type or Sort** - To change the view within the Reports pane, use the Type or Sort drop-down menus. This will change how the items are displayed in the Reports pane.

#### To Change the View Displayed in the Catalog:

1. Use the **Type** drop down to filter the Reports pane to a specific type of object (e.g., Analysis (Report) or Dashboard).

---

Note: Set the Type back to **All** in order to reset the Catalog to the default view of all items.

---

2. Select the **Sort** drop-down menu.



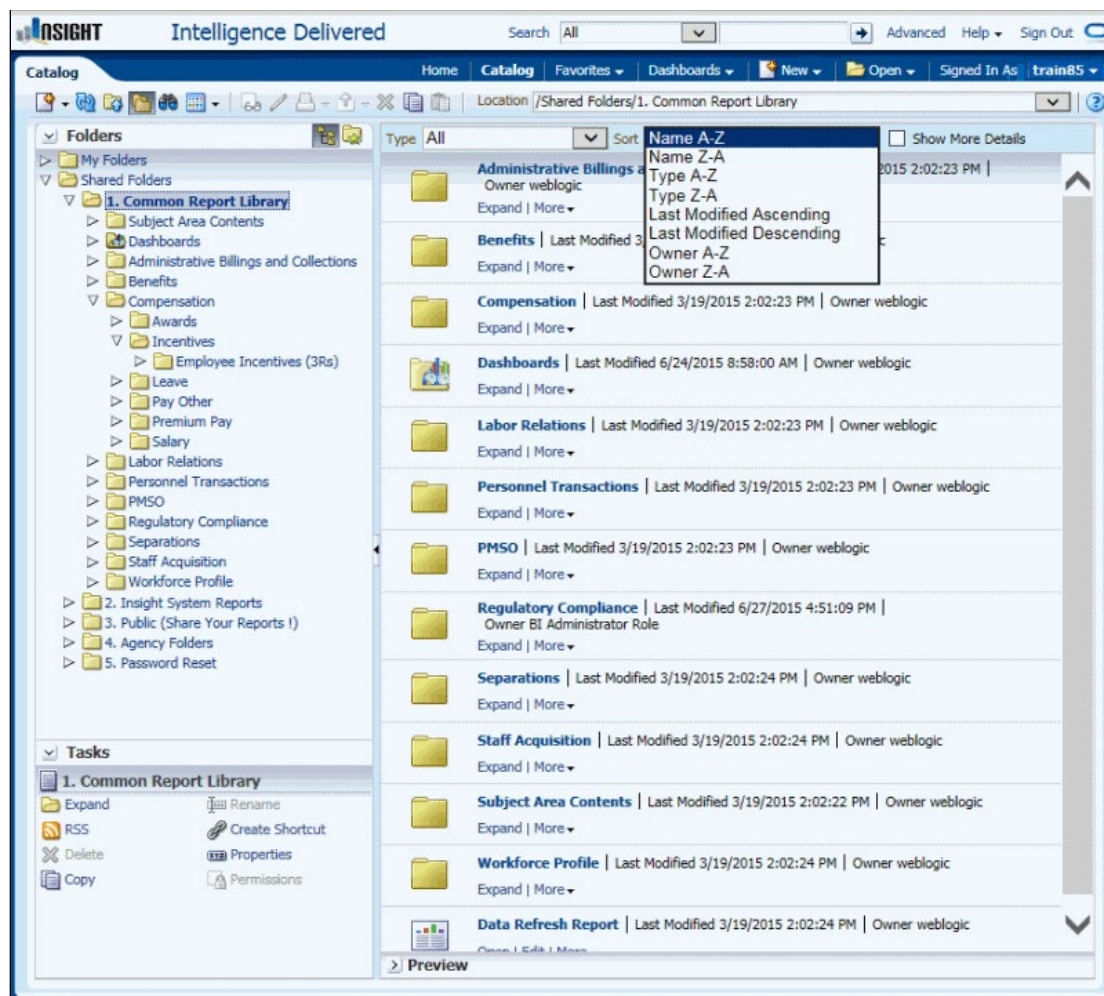


Figure 114: Sort Drop-Down Menu in the Catalog

3. Select the **Show More Detail** check-box to display details for each report in the Reports pane.

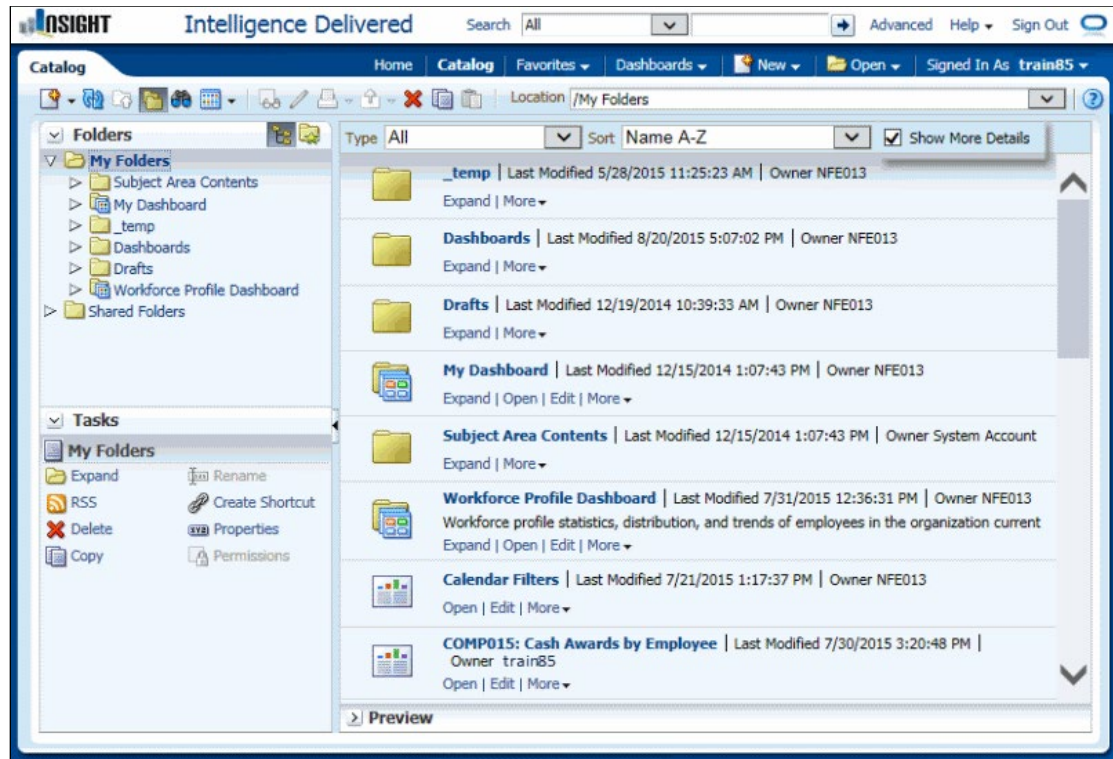


Figure 115: how More Details Check-Box on the Reports Pane

## Adding a Report to Favorites

When navigating through folders in the Folders pane, select the folder name to see the list of contents.

### To Add a Report to Favorites:

1. Select the **More** action link from the Catalog.
2. Select **Add to Favorites**.



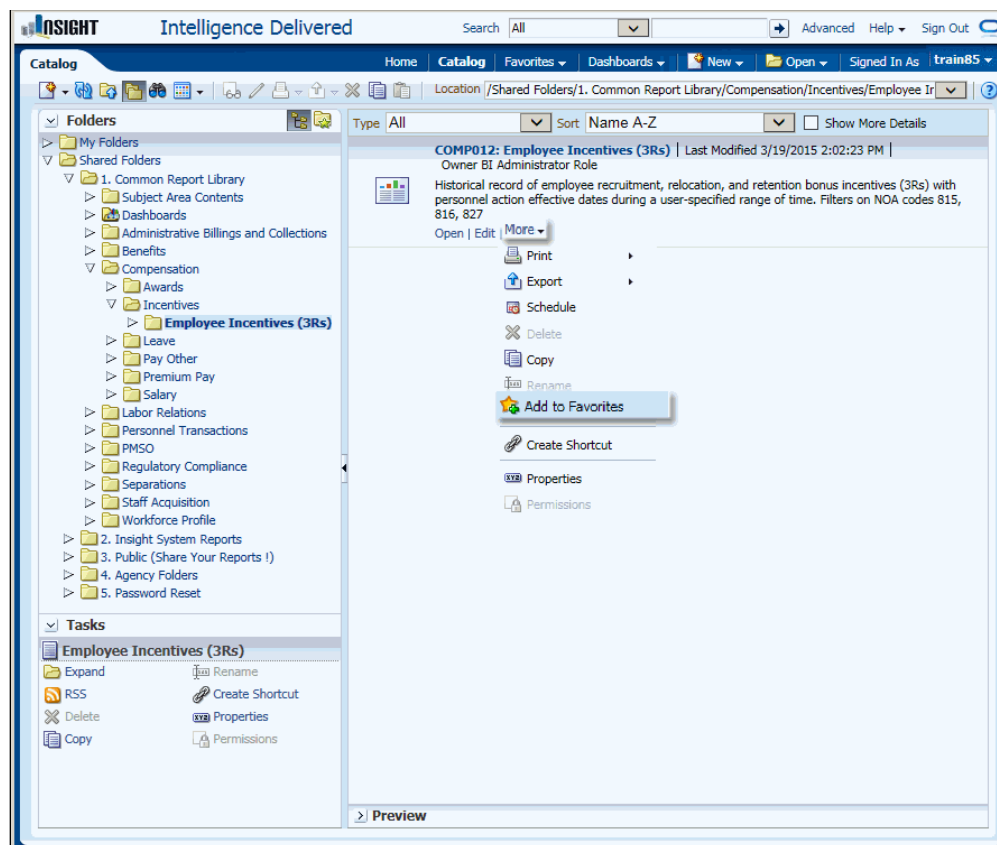


Figure 116: More Drop-Down Menu with Add to Favorites Option



A star will appear on the report icon indicating it is part of the Favorites menu.

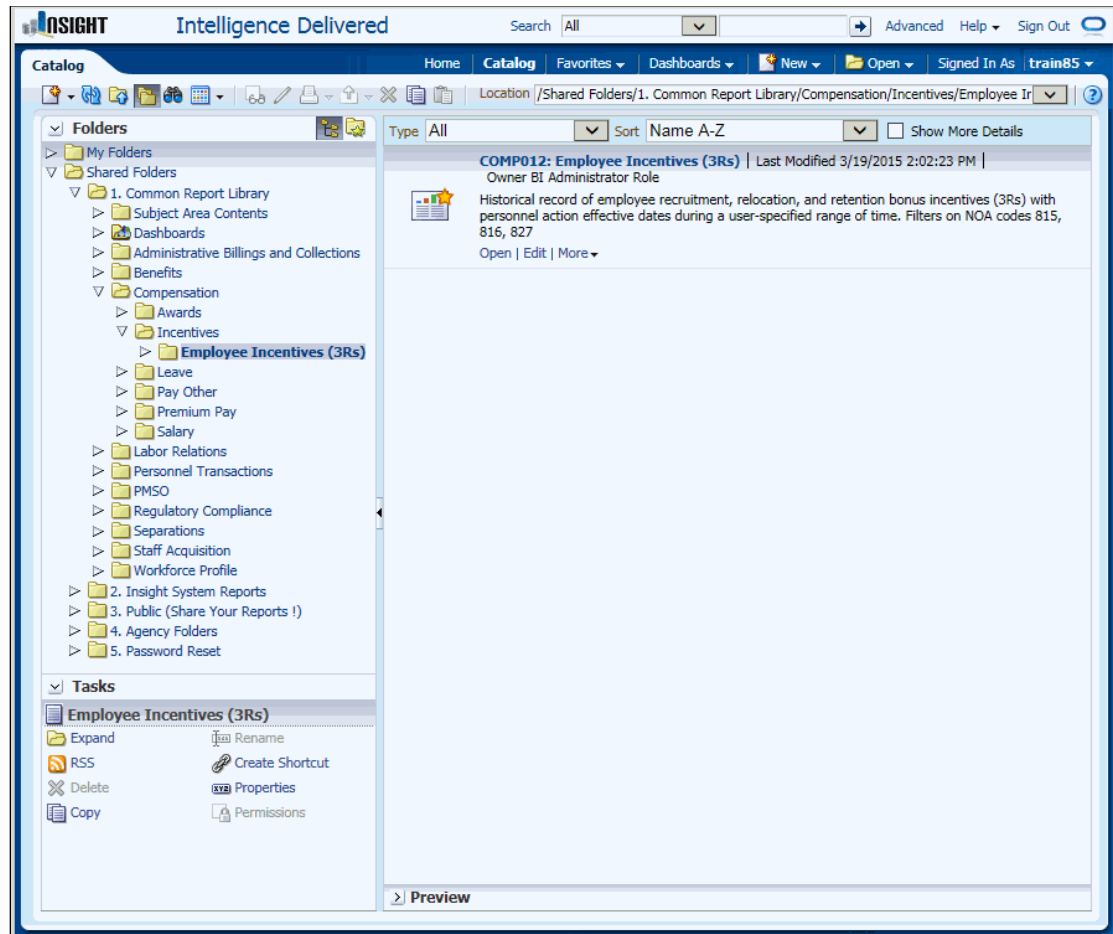


Figure 117: Favorite Indicator on Report

3. Select the **Favorites** action link to view the list of favorite reports on the navigation bar.

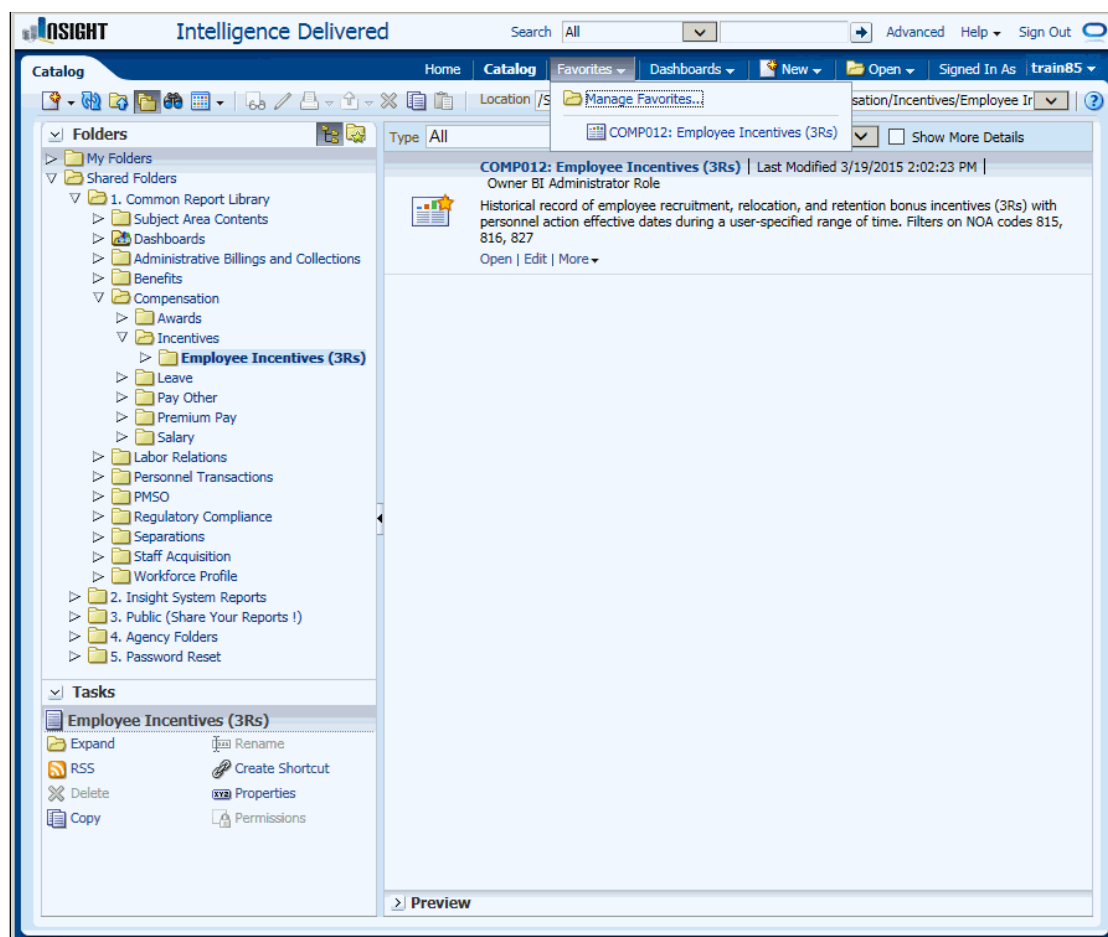


Figure 118: Favorites Action Link With a List of Users Favorites

4. Select the **More** action link.
5. Select **Remove From Favorites** to remove the report from Favorites.

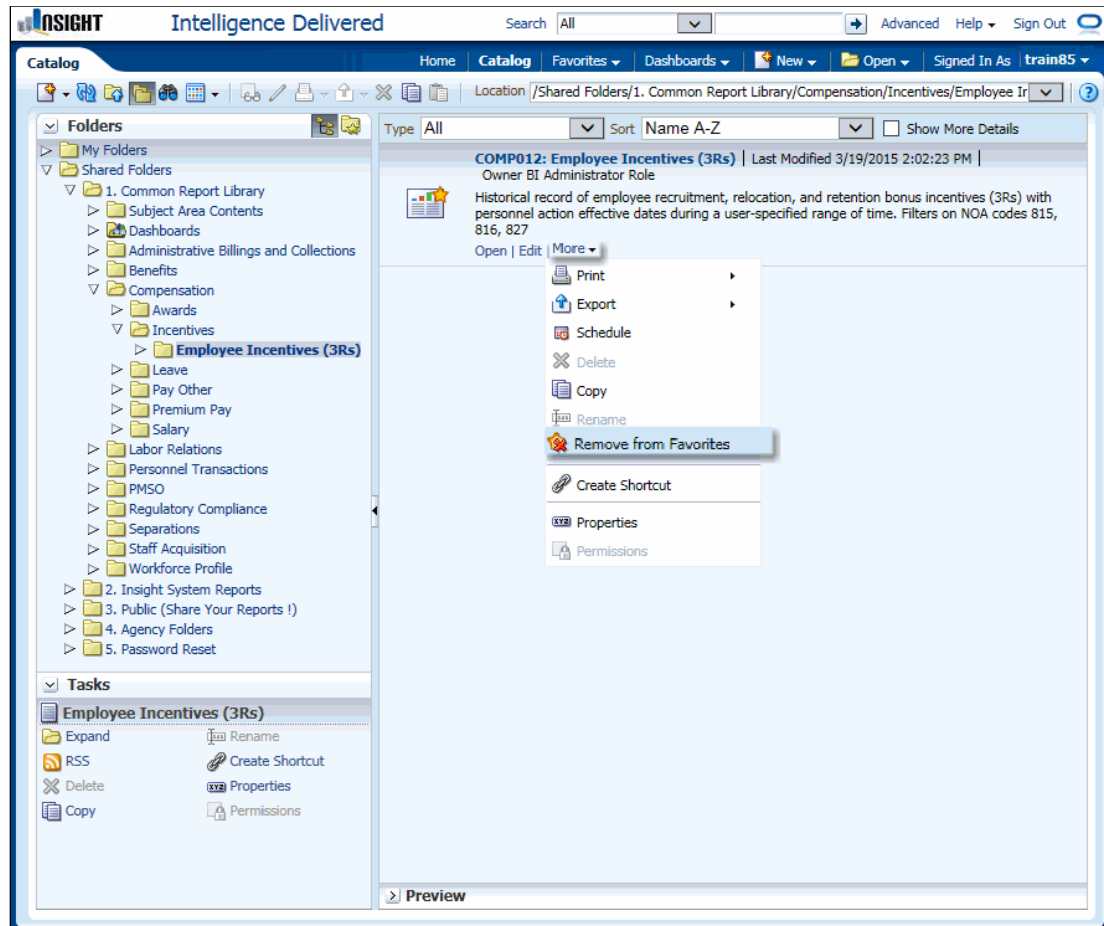


Figure 119: More Action Link Drop-Down Menu (Select Removed from Favorites)



## Advanced Tab

The Advanced tab allows users to apply XML and SQL codes to reports. Insight users can also share XML and SQL codes with other users to recreate reports. To update a report based on the new XML code, select **Apply XML** in the Advanced tab.

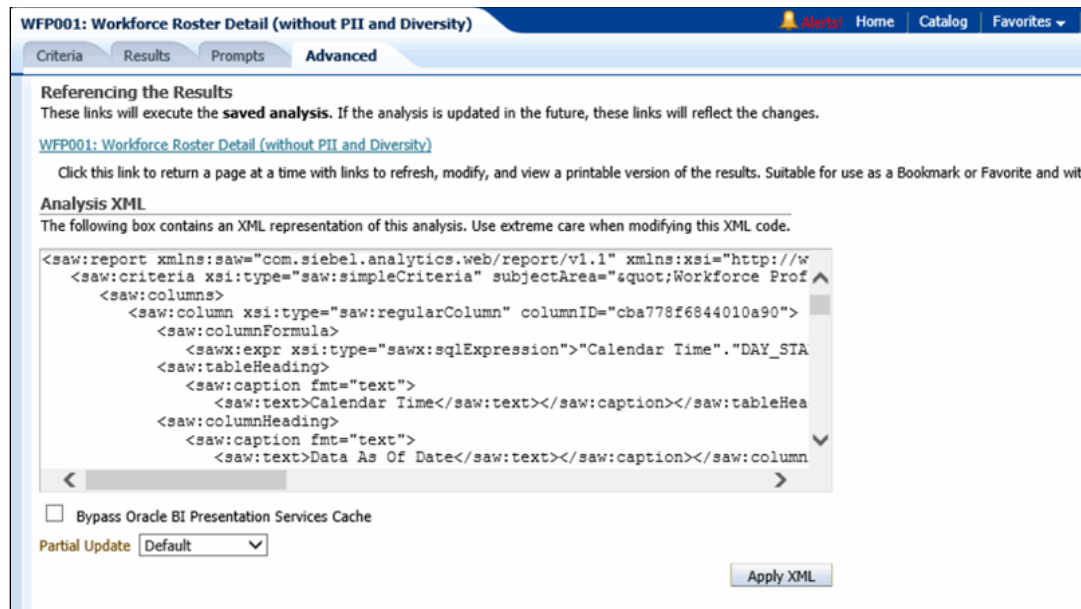


Figure 120: Apply XML in Advanced Tab

## Creating an Analysis

The example below describes the steps used to protect an individual's SSN by masking the first 5 digits. To do this, the user must use three functions:

Cast, Right, and Concatenate

- User must use the cast function to split the SSN into 9 individual characters.
- User must use the right function to reveal only the last four digits of the SSN.
- Use the concatenate function to combine a create text (XXX-XX) with the last four digits of the SSN. The following steps outline this process:
  - Create an Analysis
  - Use Cast Function
  - Use String Function
  - Use Concatenate Function
  - Add a Calendar Filter



### To Create an Analysis:

1. Select **New** action link from the top navigation bar.
2. Select **Analysis** from the menu of options.
3. Select the desired Subject Area for the ad hoc report.
4. Navigate to the Criteria tab and drag and drop data elements from the Subject Areas pane to the Selected Columns pane.

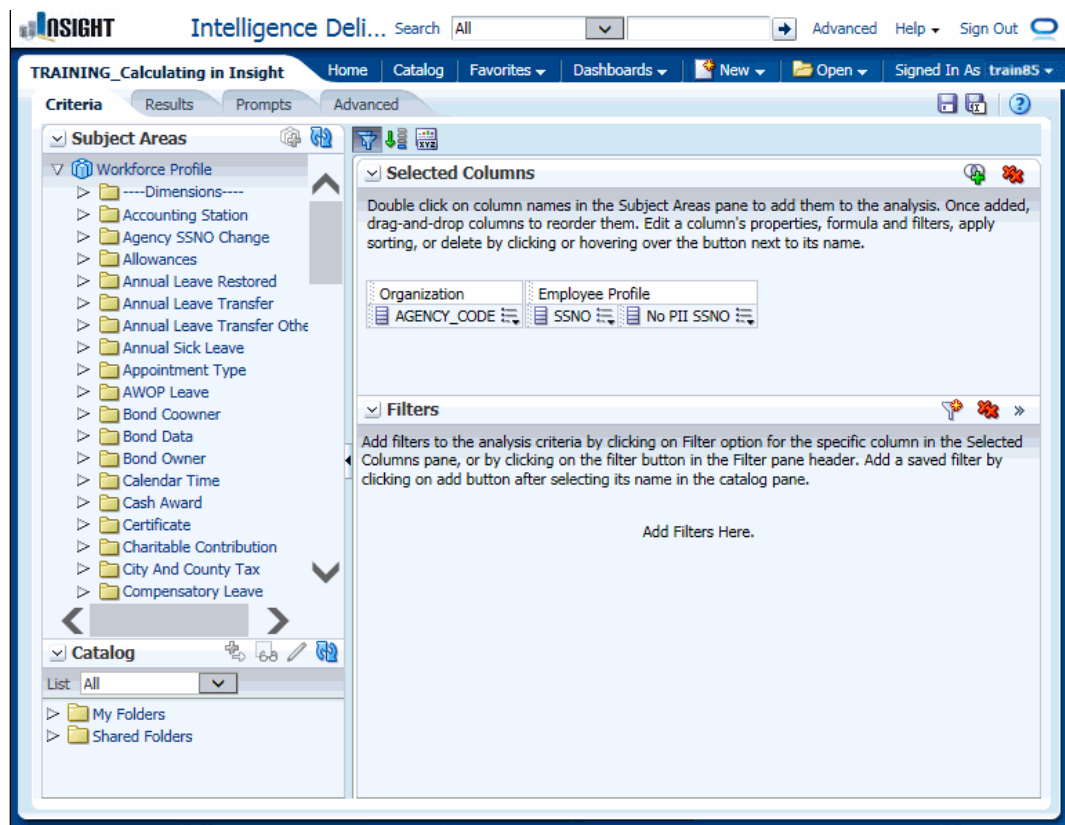


Figure 121: Selected Columns



## Results Tab

The Results tab displays the report results.

### To Use the Results Tab:

1. Select **Results** tab of the applicable ad hoc report editing page. The Results tab is displayed.

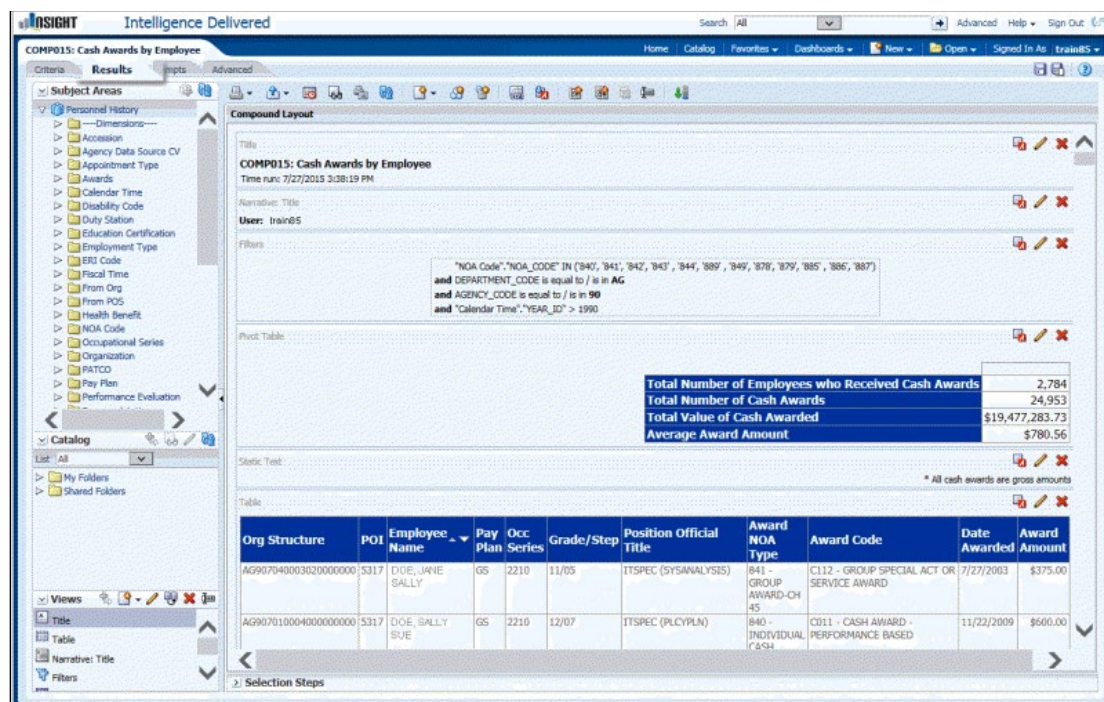


Figure 122: Report Results Tab

## Title View

### To Use Title View:

1. Select **Title** from the **New View** icon located in the Views pane. The Title View page is displayed.



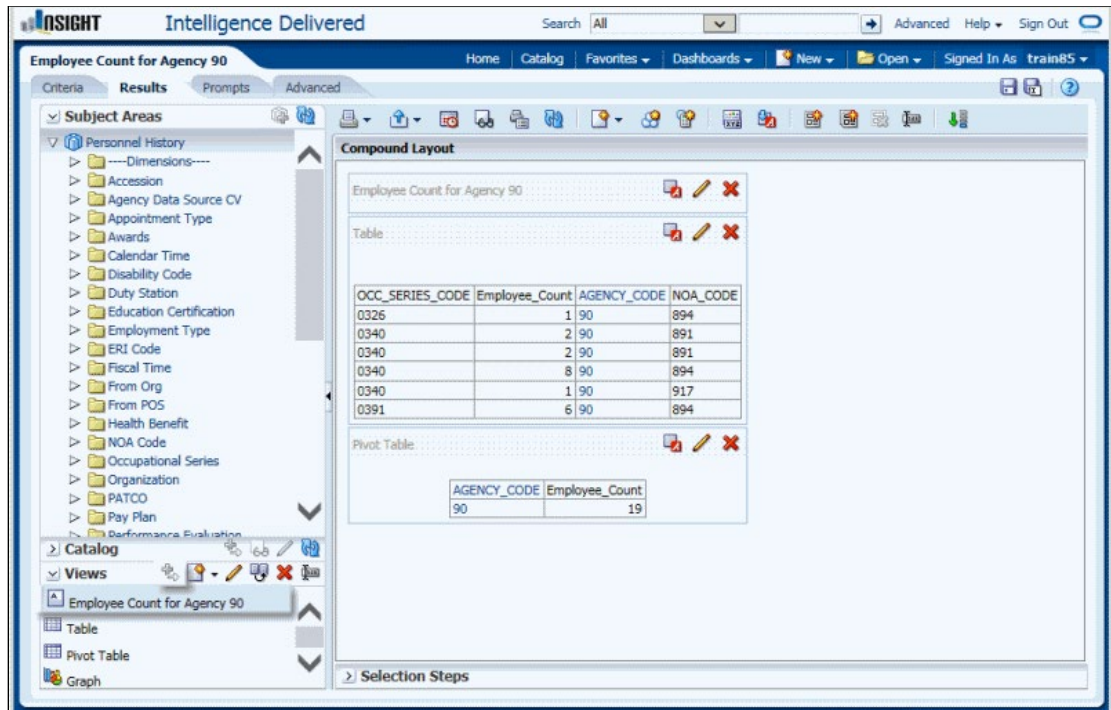


Figure 123: Views Pane With Add View Icon

Icon Name	Definition	Icon
New View	Displays a menu of additional components (e.g., graph, title, filters) to include in a report.	

Note: When a new view is added to a report, it will automatically list at the bottom of the report. Users can drag and drop report components to any location in the report.

2. Select **Edit View** icon on the corresponding Title component of the report.

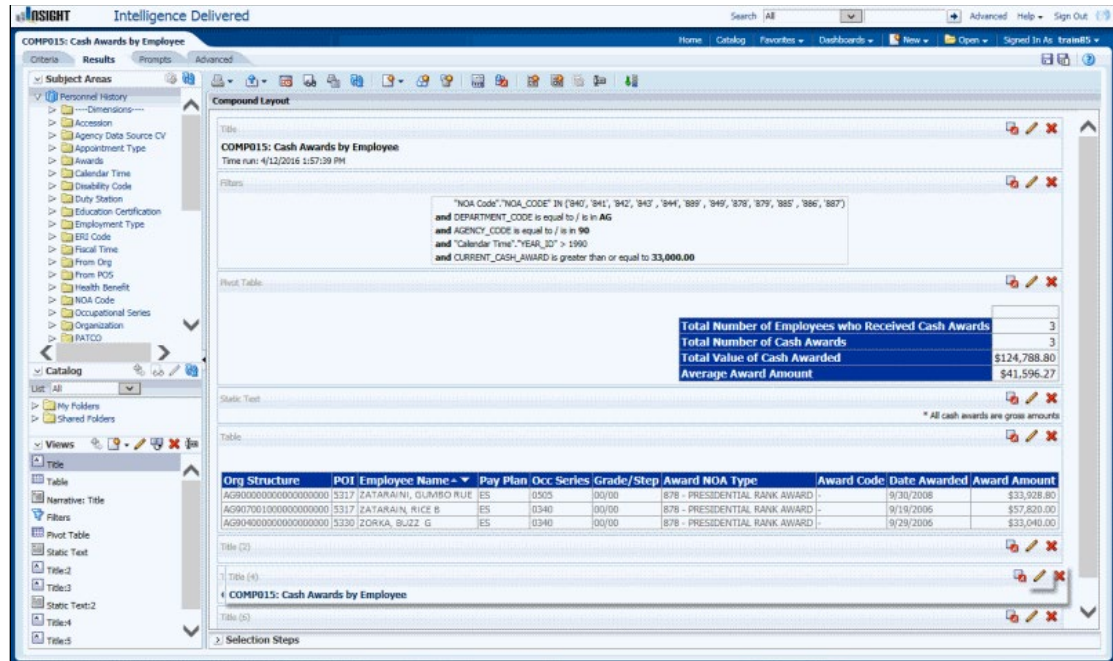


Figure 124: Edit View Icon

Icon Name	Definition	Icon
<b>Edit View</b>	Customizes the structure and/or style of a report component (e.g., title, graph, and table).	

- View the Title Editing page to change the title of the report, add a logo, sub-title, start time, etc.

Note: A preview of the Title appears at the bottom of the page as it will display in the report.

- Select the **Format Title** icon to customize the styles and formatting of any component of the Title (e.g., font or color).

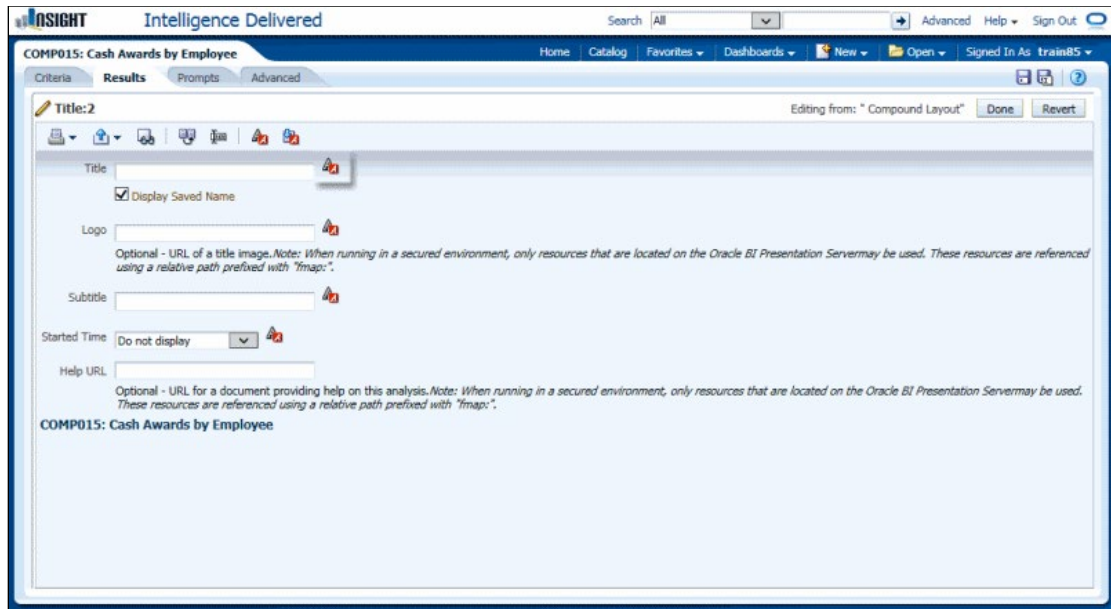


Figure 125: Title Editing Page With the Title Icon

Icon Name	Definition	Icon
Format Title View	Allow users to customize the style of text.	

Note: The **Display Saved Name** checkbox will default as selected. Uncheck the box to avoid duplicate titles once the report is saved.

5. View the Format Title popup to customize the style and formatting of the title including font, color, size, etc.

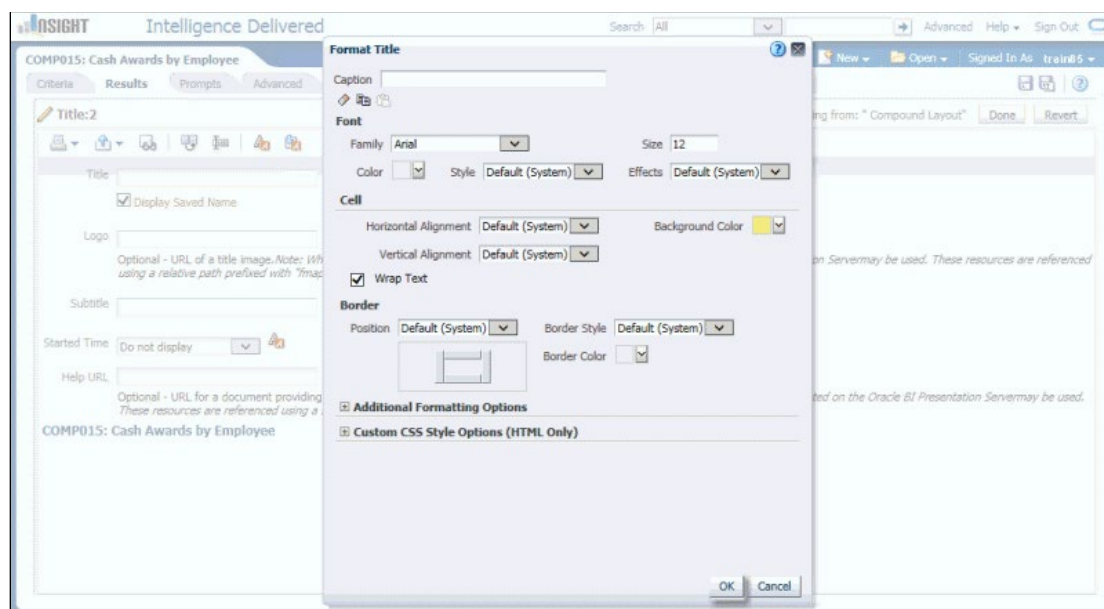


Figure 126: Format Title Popup

6. Select **OK** to close the popup.
7. Select **Import Formatting** icon from the Title View navigation bar to apply formatting from an existing report.

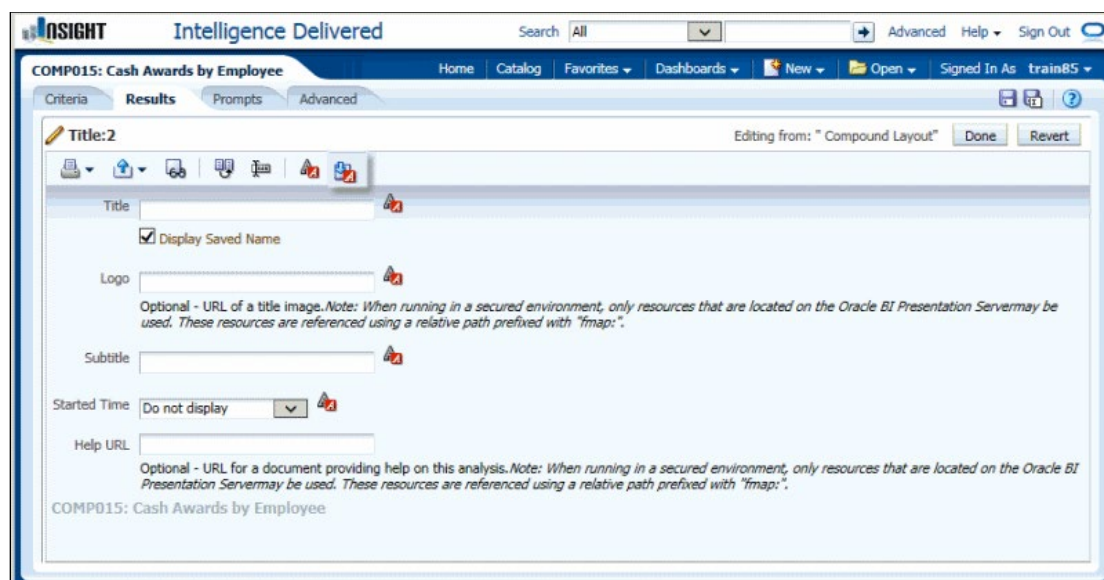



Figure 127: Import Formatting Icon

Icon Name	Definition	Icon
Import Formatting	Applies the formatting from an existing report to a new ad hoc report.	



8. Select your preferred option from the **Started Time** drop-down menu to include the report run date and/or time.

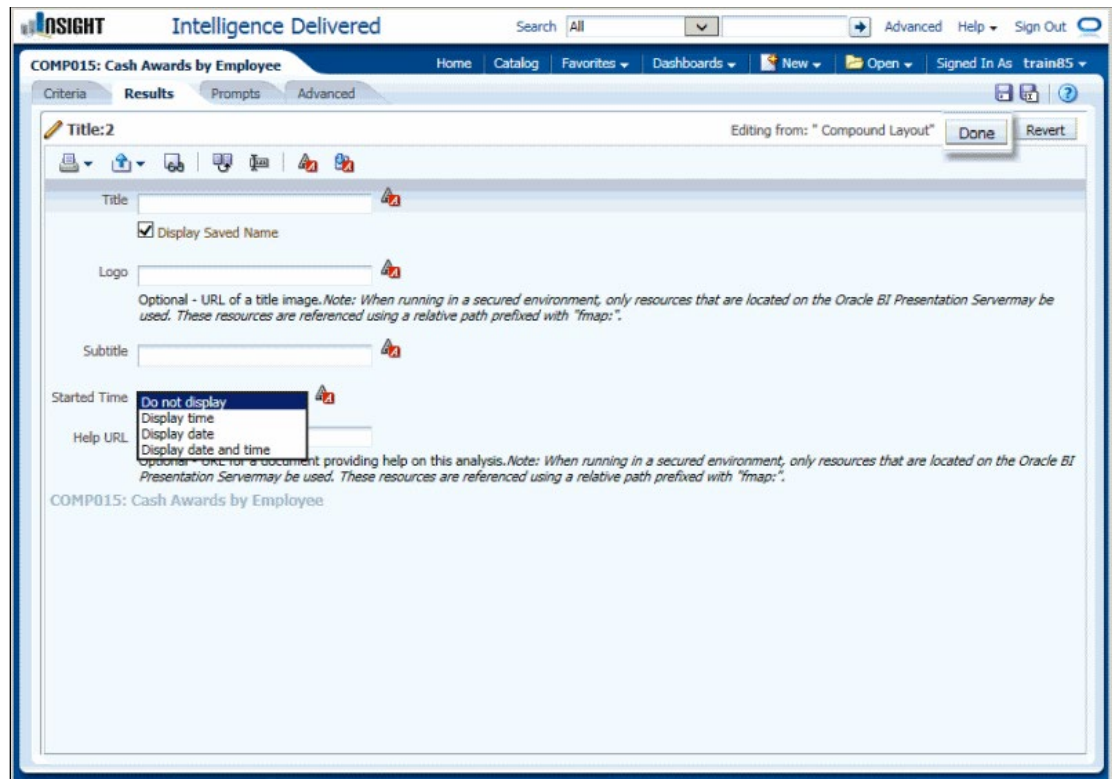


Figure 128: Started Time Drop-Down Menu

9. Select **Done** at the top of the Title Editing page.



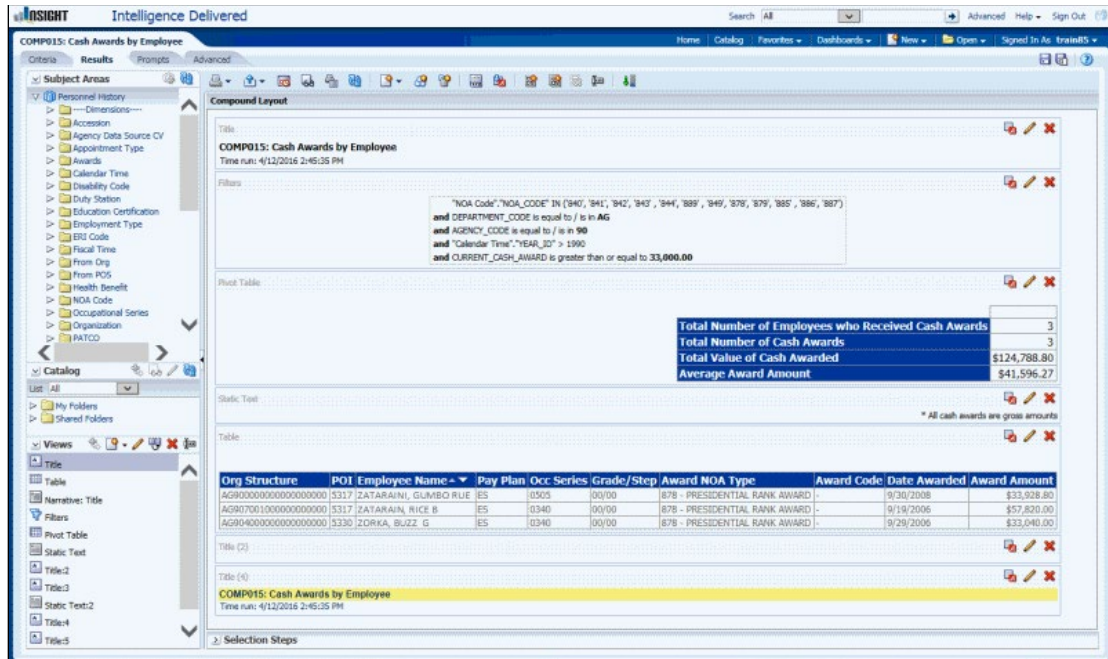


Figure 129: Final Report for Title View

## Import Formatting

### To Format Imports:

1. Select the **Results** tab. The Results tab is displayed.
2. Select **Import Formatting** icon from the **Results** tab of the *ad hoc report editing* page.

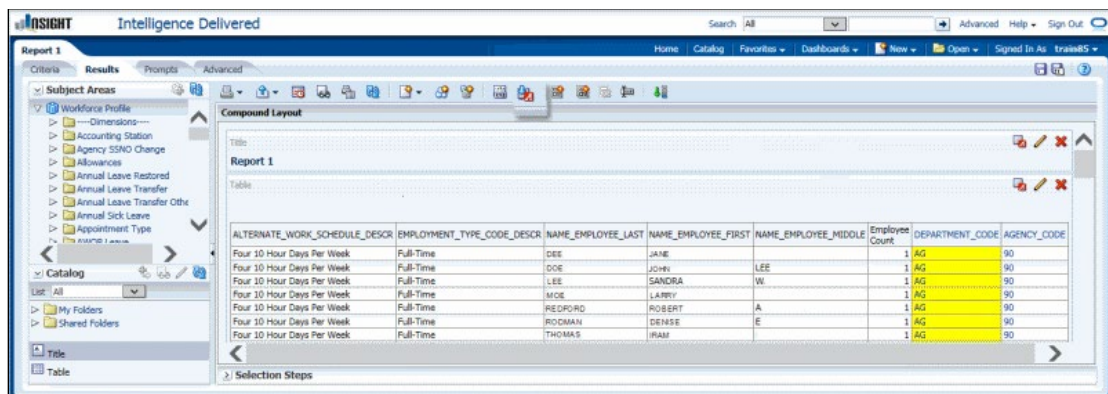


Figure 130: Import Formatting From Another Analysis Icon

Note: This option applies formatting to all the components of a report. The text from the report will also be imported (e.g., if the static text from an existing report reads "PII", then when the formatting is imported the new static text will also read "PII").

3. Use the Select Analysis page to navigate to the **Folders** pane.

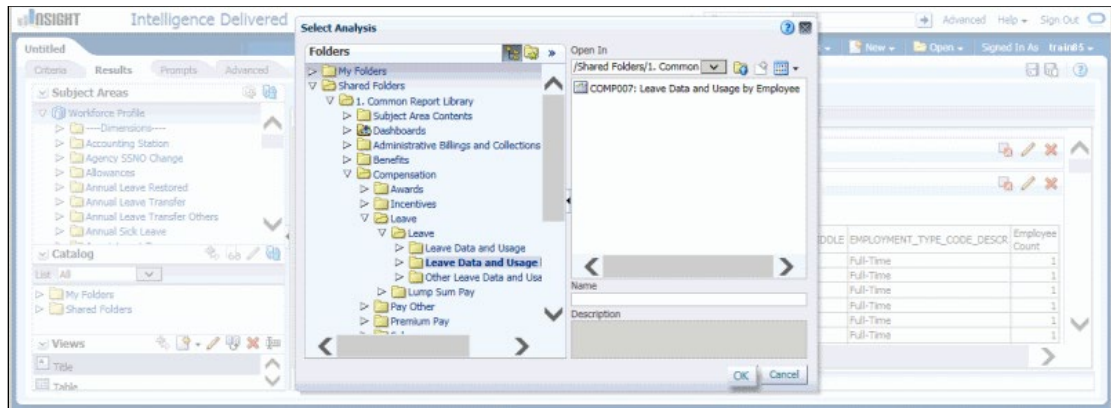


Figure 131: Select Analysis Window With Folders Pane

4. Select the report with the desired format.
5. Select **OK** to close the popup.
6. View the updated report with the applied formatting (e.g., font styles, colors, data format) from the selected report.

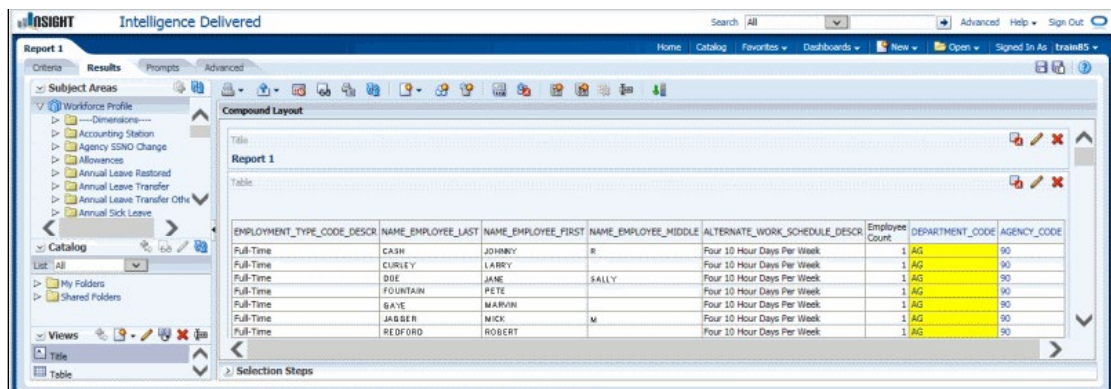


Figure 132: Ad Hoc Report With Imported Formatting





## Editing in Insight

### Formatting and Customizing Reports

#### Formatting and customizing a report:

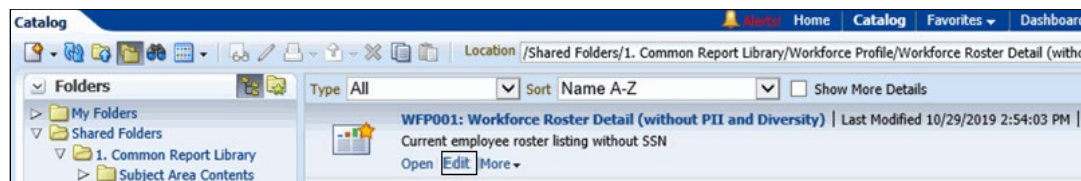
- Maintains consistency across reports
- Highlights data and show synopsis of data
- Make reports visually engaging and organized
- Enhance clarity of reports

### Editing and Formatting a Common Report

Users can manipulate common reports by selecting the **Edit** action link.

#### To Edit and Format a Common Report:

1. Select the **Edit** action link to open the ad hoc report editing page.



**Figure 133: Edit Action Link**

Note: To customize the styles, formatting, and structure of the report, users will focus primarily on the Criteria and Results tabs. These tabs contain the more basic and commonly used ad hoc features of Insight.

The following four tabs are displayed:

- **Criteria tab:** Allows users to add/remove data elements or columns included in the report and apply basic edits such as styles and formatting, filters, sorting.
- **Results tab:** Allows users to view the result of the selected data elements and formatting in the Criteria tab and add component(s) to the report such as text, tables, and graphs.
- **Prompts tab:** Provides users with the ability to create report prompts that allow the report consumer to manipulate restrictions on data displayed in the report.
- **Advanced tab:** Provides users with access to view SQL and XML code generated for an analysis or paste in XML and SQL code from another analysis.

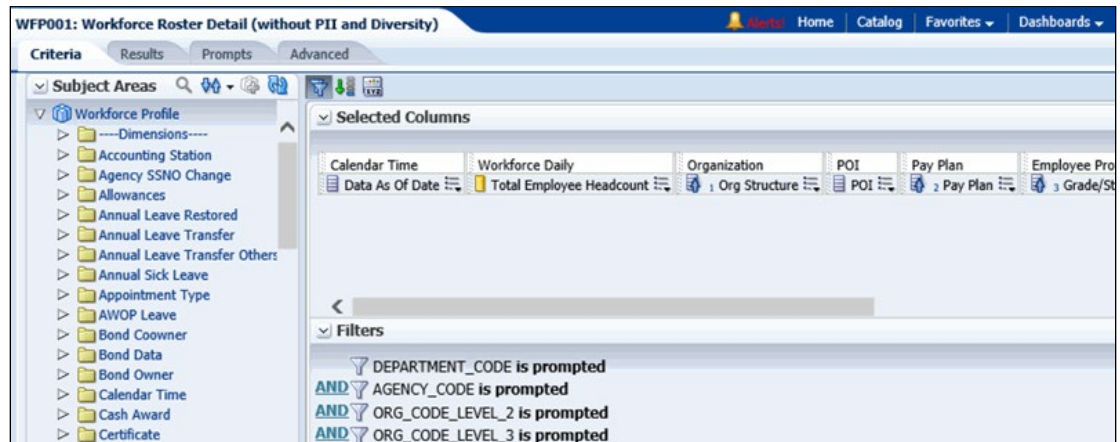


Figure 134: Four Tabs: Criteria, Results, Prompts, and Advanced

2. Select the **Criteria** tab. The following panes are displayed:

- **Subject Area:** Lists the available data elements within that **Subject Area**.
- **Catalog:** Lists **My Folders** and **Shared Folders** containing saved reports, dashboards, filters, prompts, etc.
- **Select Columns:** Allows users to apply a variety of customizations to each data element included as a column in the report.
- **Filters:** Provides a workspace where new filters will be listed vertically as they are created.

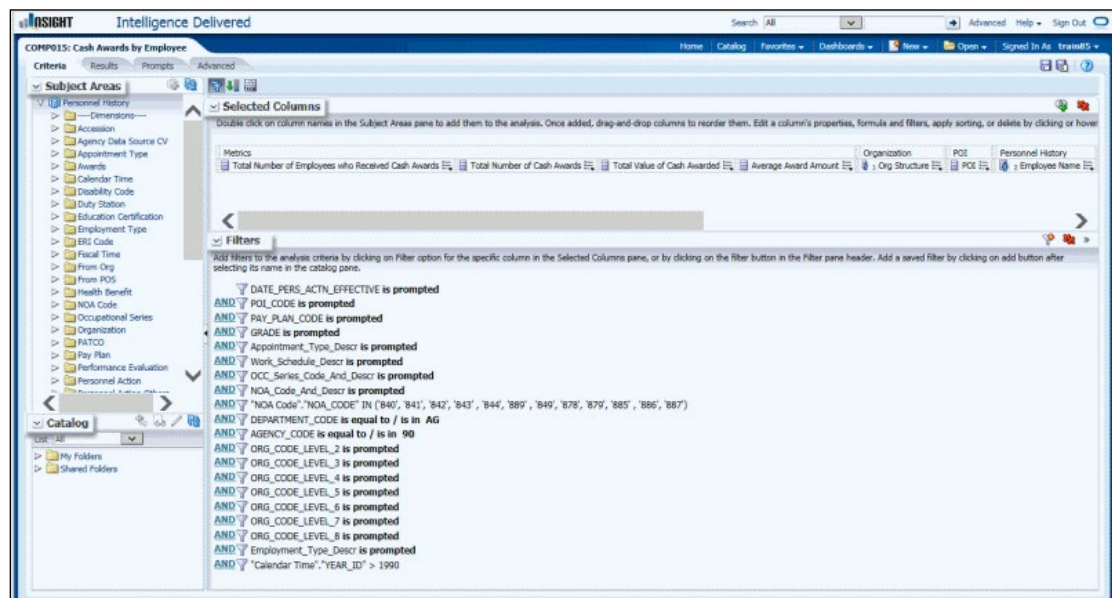


Figure 135: Criteria Tab With a View of the Panes



3. Navigate to the folders within the **Subject Areas** pane to view a list of data elements available for report development.

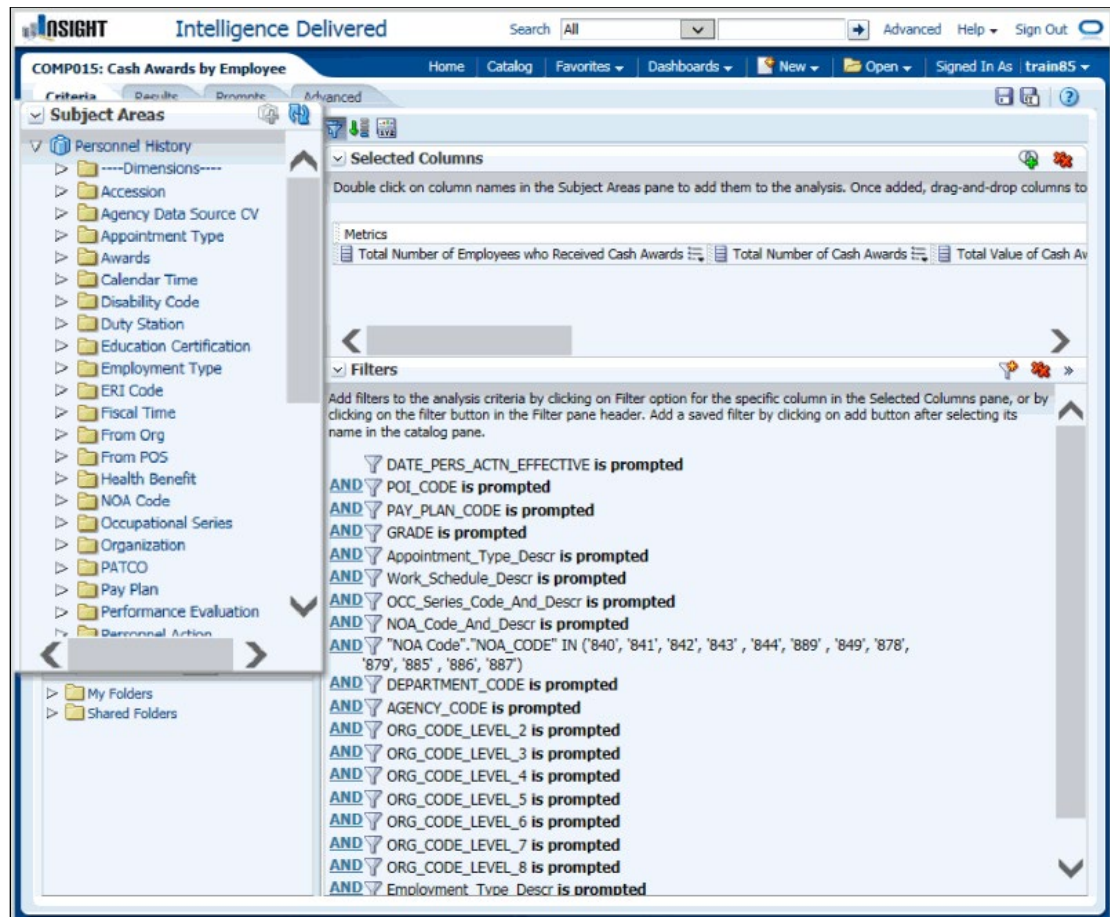


Figure 136: Report Subject Areas Pane

Note: Users can either double-click or drag and drop a data element from the **Subject Areas** pane to the **Selected Columns** pane.

4. Apply customizations by selecting the **Edit** icon from the desired data element once a data element is in the Selected Columns pane.

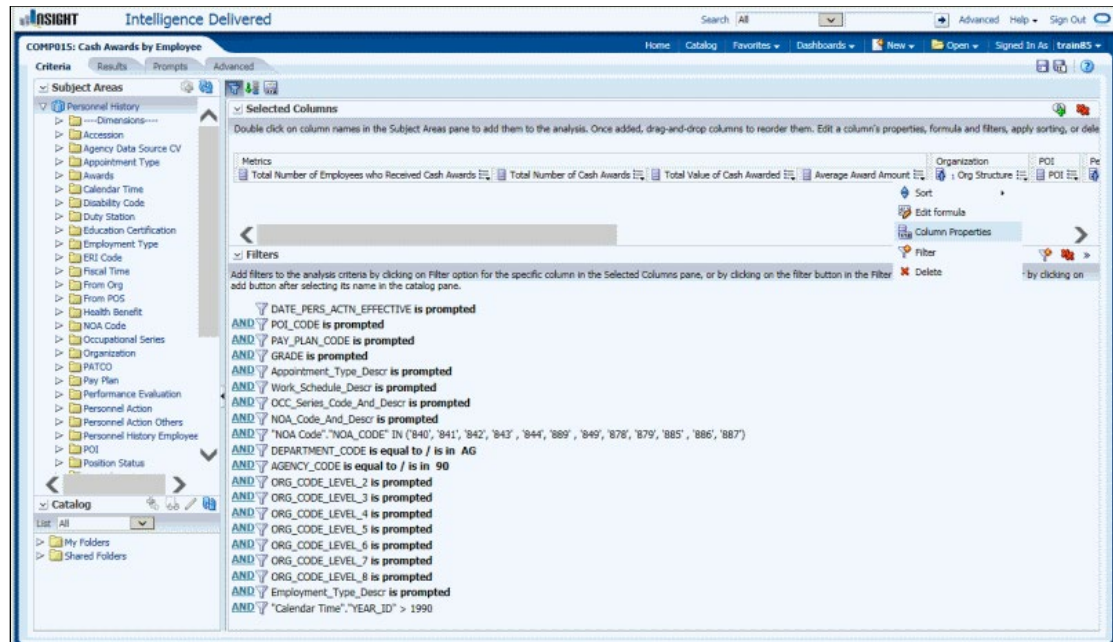


Figure 137: Column Properties Option

The following Edit options are available:

- **Sort:** Allows users to organize the values of the data in a specific order (e.g., ascending, descending).
- **Edit Formula:** Allows users to create a formula to change how the data in the column appears or to combine columns (e.g., First Name, Last Name = First Name Last Name).
- **Column Properties:** Allows users to visually format the styles and appearance of the column (e.g., font, colors, conditional formatting).
- **Filter:** Restricts data to a certain data set before the report runs.
- **Delete:** Removes the data element from the Selected Columns pane.

## Rearranging Data with Formulas

To Rearrange Data with Formulas:

1. Navigate to the **Selected Columns** pane in the Criteria tab of the ad hoc report editing page.
2. Select **Edit** for the desired data element and in the drop-down menu.
3. Select **Edit Formula**.



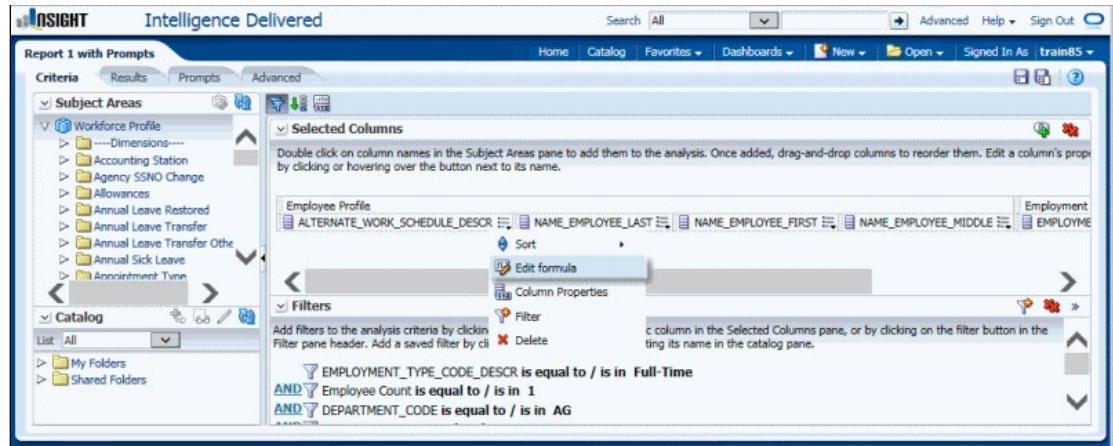


Figure 138: Data Element Edit Format Option

4. View the Edit Column Formula popup to customize the Column Heading and apply formulas to the column values.
5. Select **Custom Headings** checkbox to edit the Folder Heading and Column Heading.

Note: Leave the Aggregation Rule Set at default.

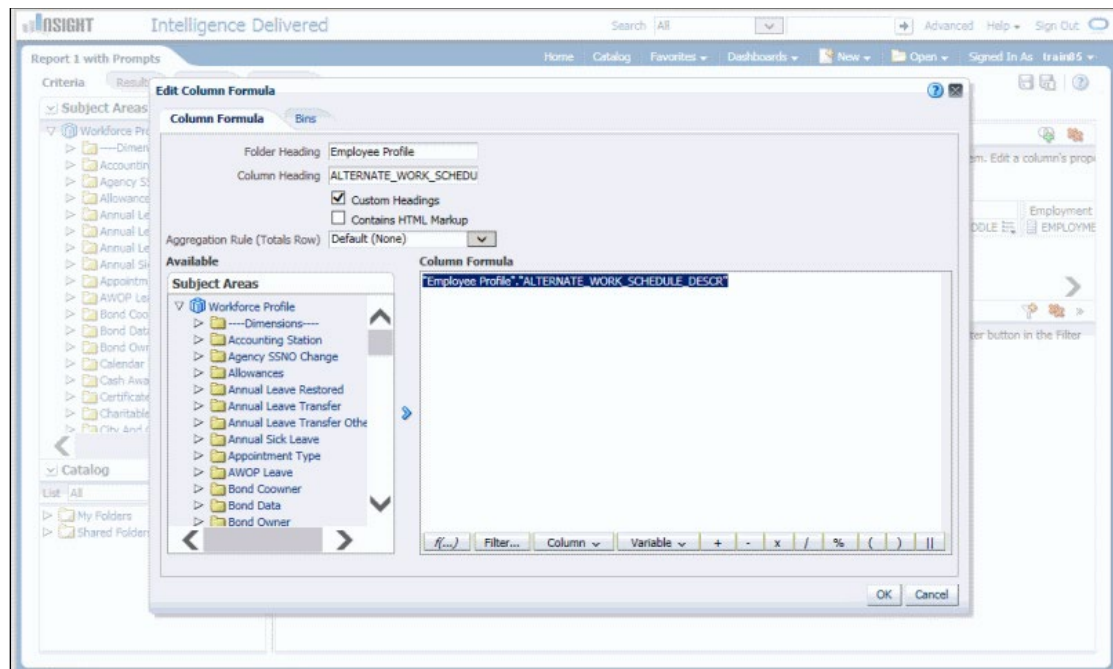


Figure 139: Custom Headings

6. Select **Column** to choose from a menu of data elements in the pane to use in the formula.



Note: Mathematical operations available appear below the Column Formula workspace. Make sure the Column Formula is highlighted before selecting the Column menu.

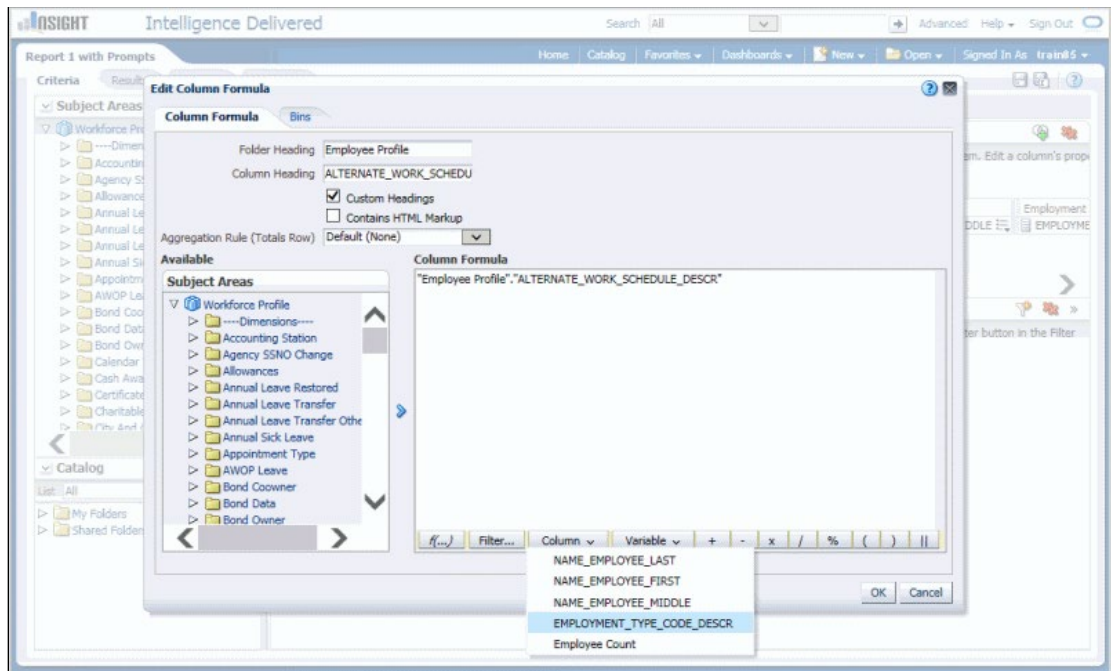


Figure 140: Column Option in the Column Formula

7. Navigate to the **Insert Function** icon.
8. Select the desired function.
9. Select **OK**. The Insert Function popup appears.

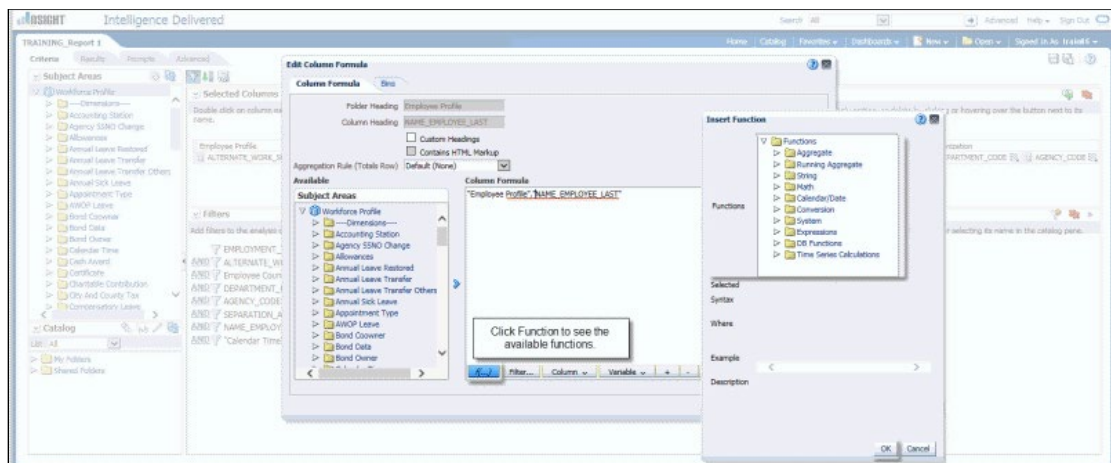


Figure 141: Insert Function Popup



The Desired Function List at the beginning of the formula is displayed in the Column Formula workspace.

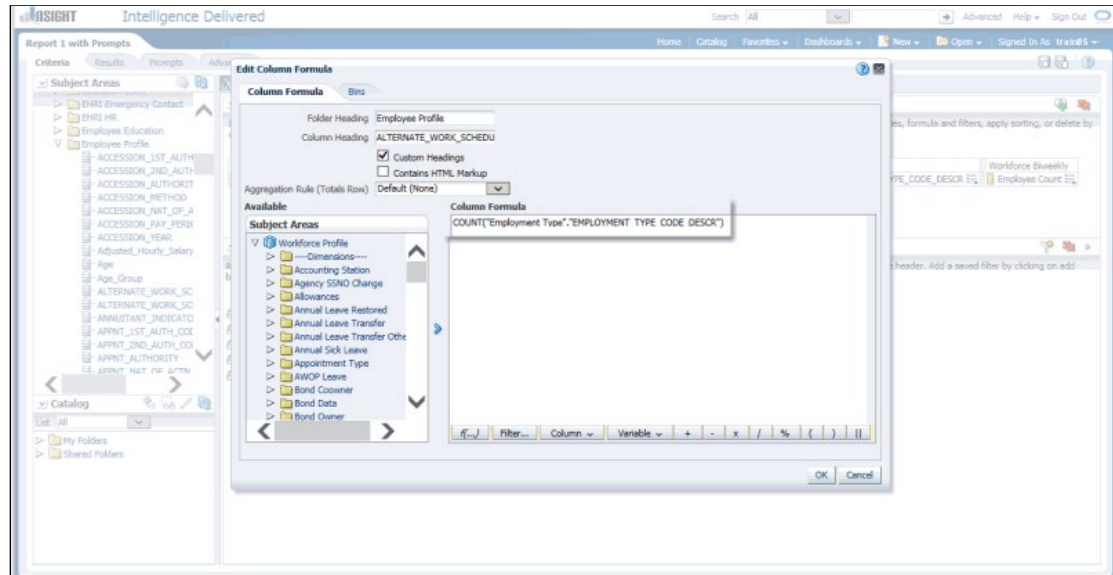


Figure 142: Column Formula Workspace With Desired Function Added

## Editing Column Properties

The Column Properties allows columns to be edited/formatted by each user.

### To Edit Column Properties:

1. Select the **Edit** icon from one of the desired data elements.
2. Select **Column Properties** from the drop-down menu of the data element in the **Selected Columns** pane.



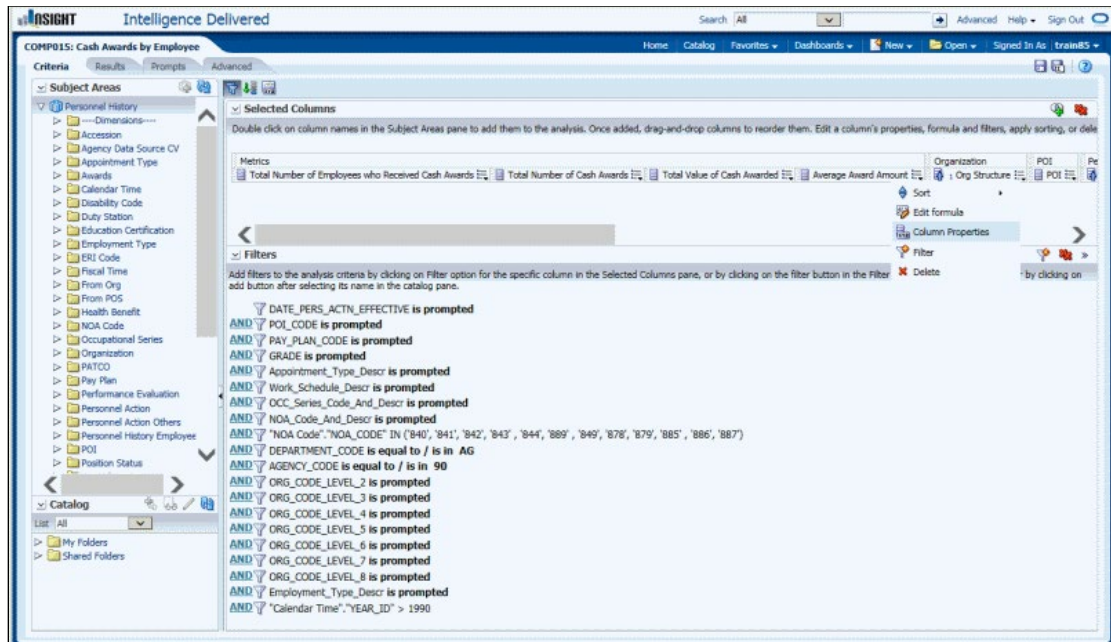


Figure 143: Column Properties Option

The following are the available options under Column Properties:

Term	Definition	Icon
Edit Icon	Allows user to edit the appearance of data elements and reports.	
Sort	Organizes the values of the data element in a specific order.	
Edit Formula	Manipulates the appearance of the values of data elements using formulas and functions.	
Column Properties	Customizes the aesthetics of reports such as changing the font color of data elements.	
Filter	Restricts data elements that are present in the report.	
Delete	Removes a data element from the report.	
Save Column As	Allows user to save that column to <i>My Folders</i> to use in another analysis.	

Figure 144: Column Properties Valid Values

3. View the **Column Properties** page with five tabs containing options to format the properties of the data element as it appears within the report. The Column Properties popup appears.

The following are available on the five tabs:

- **Style:** Provides users with a number of options to customize the appearance of fonts, cells, and borders of a column.



- **Column Format:** Allows users to customize the report column heading and the way data is grouped within columns (e.g., merge common cells or remain separate).
- **Data Format:** Allows users to customize how the data appears within a report column (e.g., as a number, text, or percentage).
- **Conditional Format:** Allows users to highlight certain data elements within the column based on a defined condition.
- **Interaction:** Allows users to add action links to column headings and values.

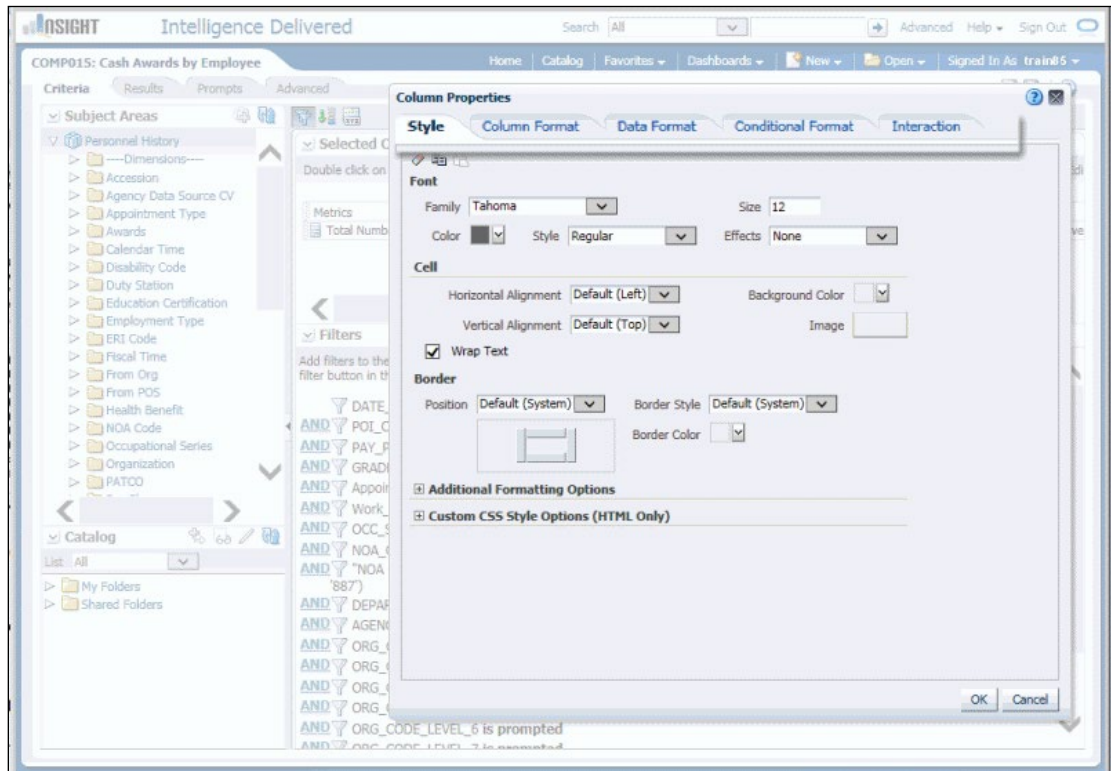


Figure 145: Column Properties Tabs

4. Make the applicable edits.
5. Select the **OK** button.
6. The edits are saved.



## Using Conditional Formatting

### To Use Conditional Formatting:

1. Select the **Criteria** tab. The Criteria tab is displayed.
2. Navigate to the **Selected Columns** pane within the **Criteria** tab of the ad hoc report editing page.
3. Select **Edit** icon for the desired data element and select **Column Properties** from the drop-down menu.
4. Navigate to the **Conditional Format** tab.

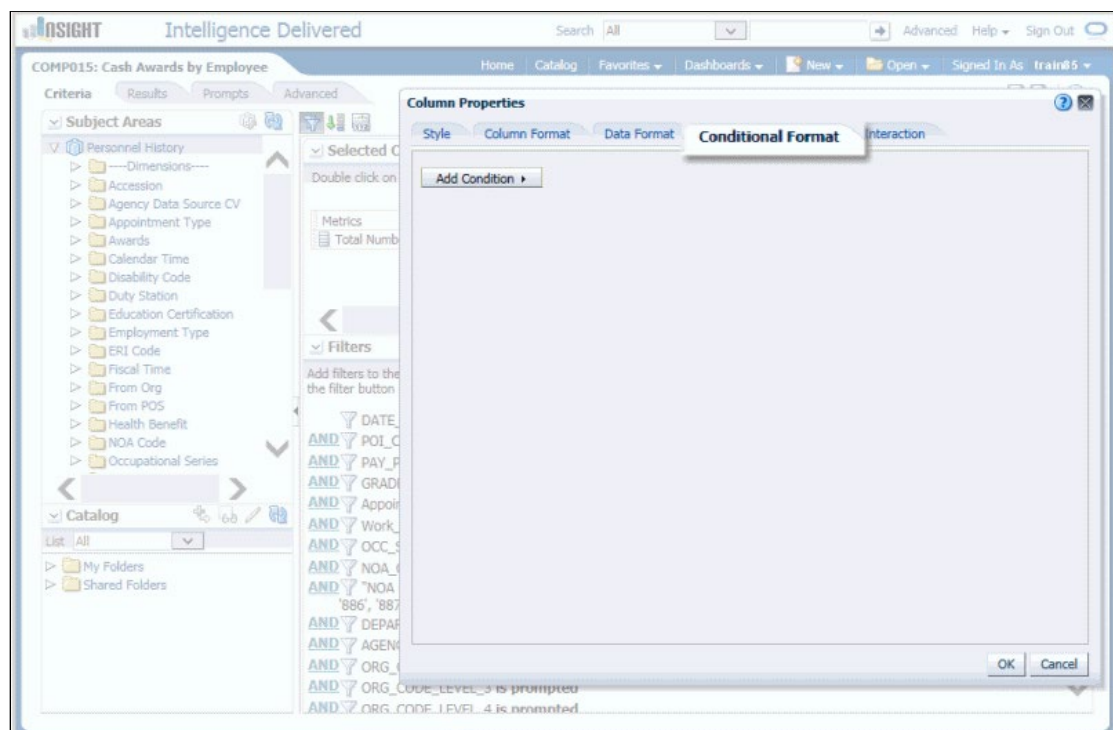
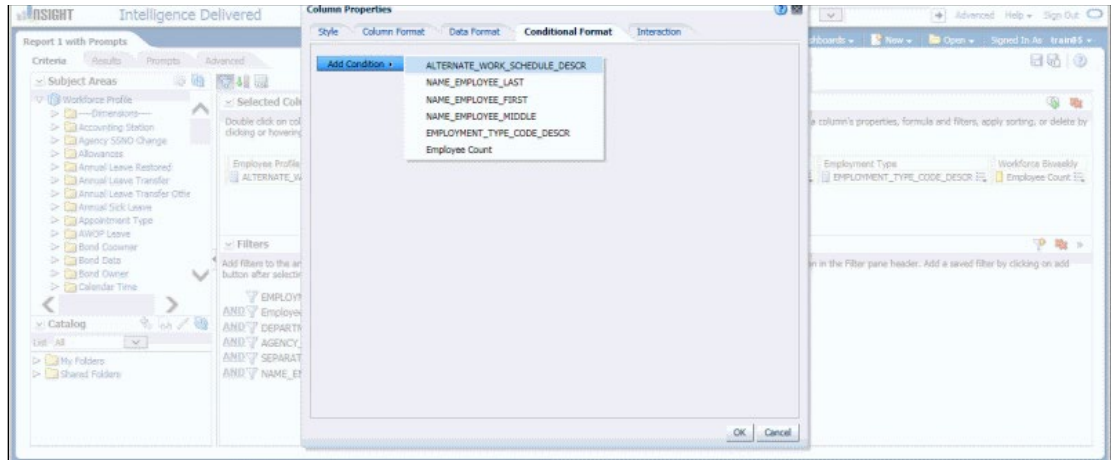


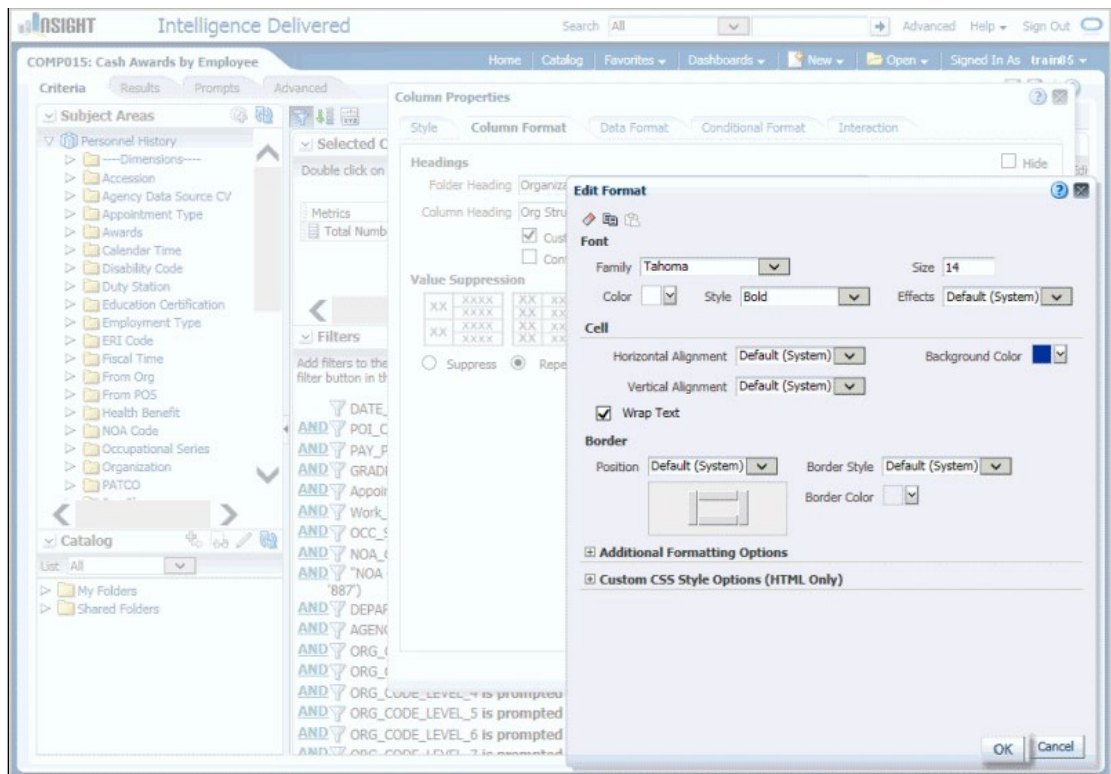
Figure 146: Conditional Format Tab Within the Column Properties Window

5. Select **Add Condition** to apply conditional formatting to the targeted data element. The Add Condition options are displayed



**Figure 147: Add Condition in the Conditional Format Tab**

6. View the New Condition page to customize the conditions and values to highlight.



**Figure 148: Edit Format popup**

7. Select **OK** to close the Edit Format popup. The New Condition popup appears.



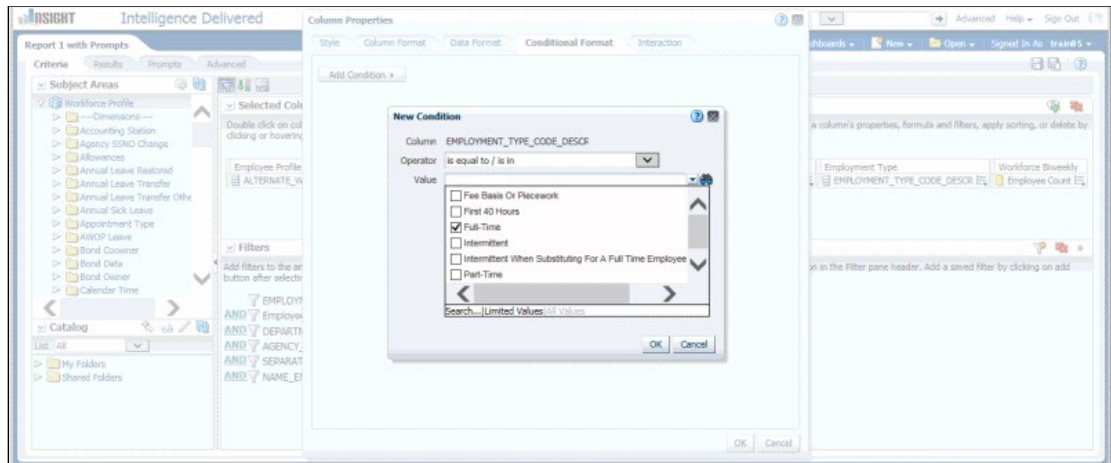


Figure 149: New Condition Window

8. View to select the styles and formatting of how the condition will be shown in the report.

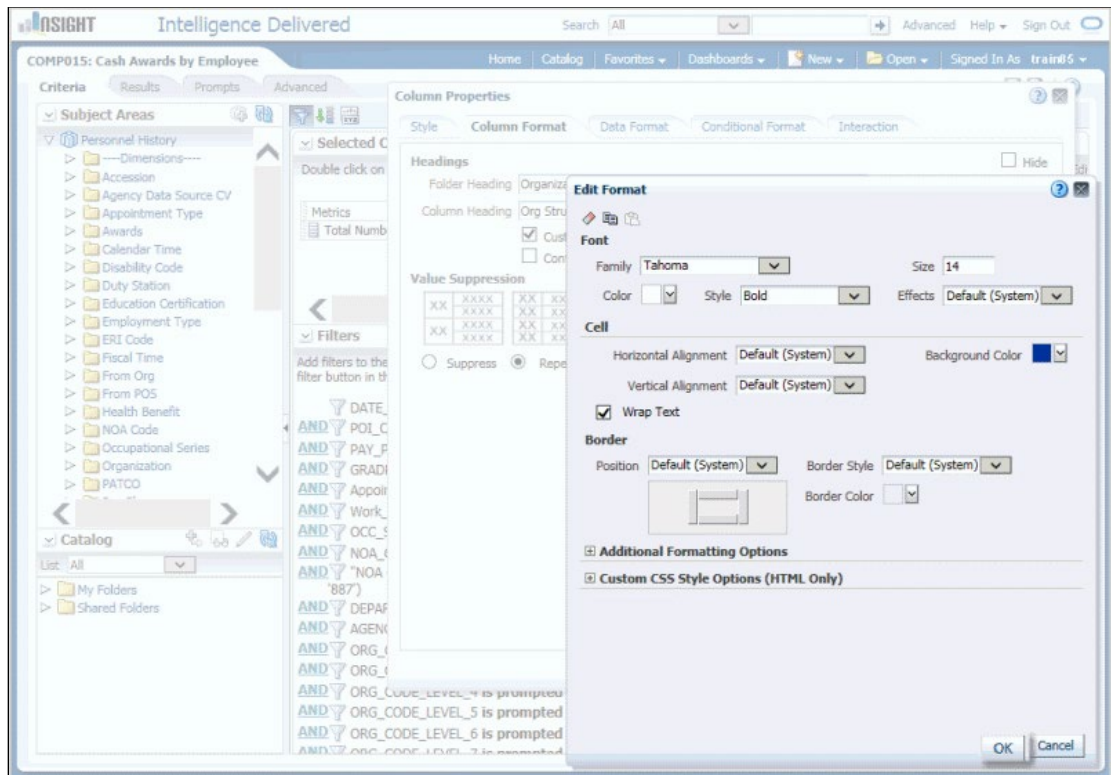


Figure 150: Edit Format popup

9. Select **OK** to accept the changes. The Column Properties popup appears.
10. View the new conditions in the Column Properties popup.

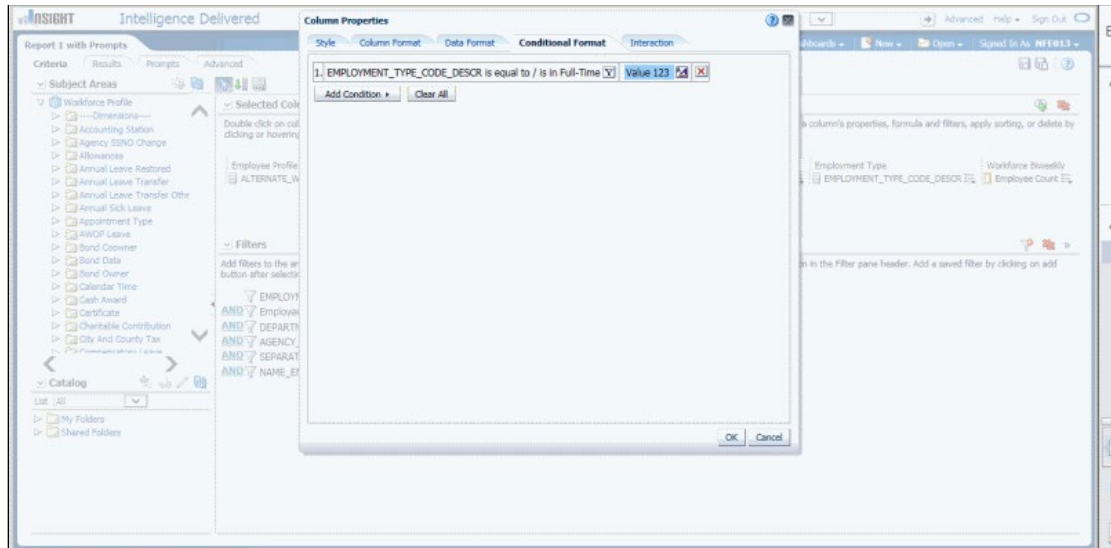


Figure 151: Column Properties popup

11. Select **OK** to close the Column Properties popup.
12. Navigate to the Results to run the report with the new conditions.
13. Select **Save As** icon.
14. Save the report.

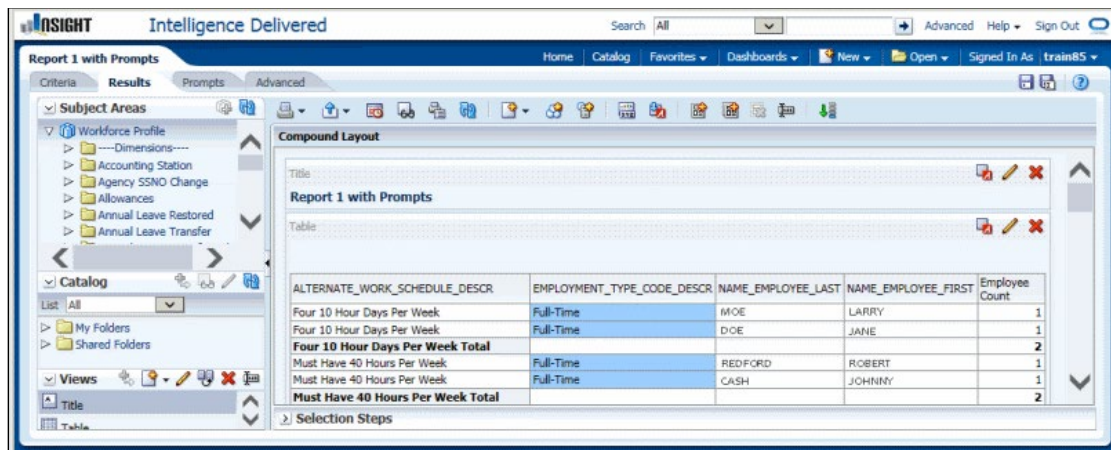
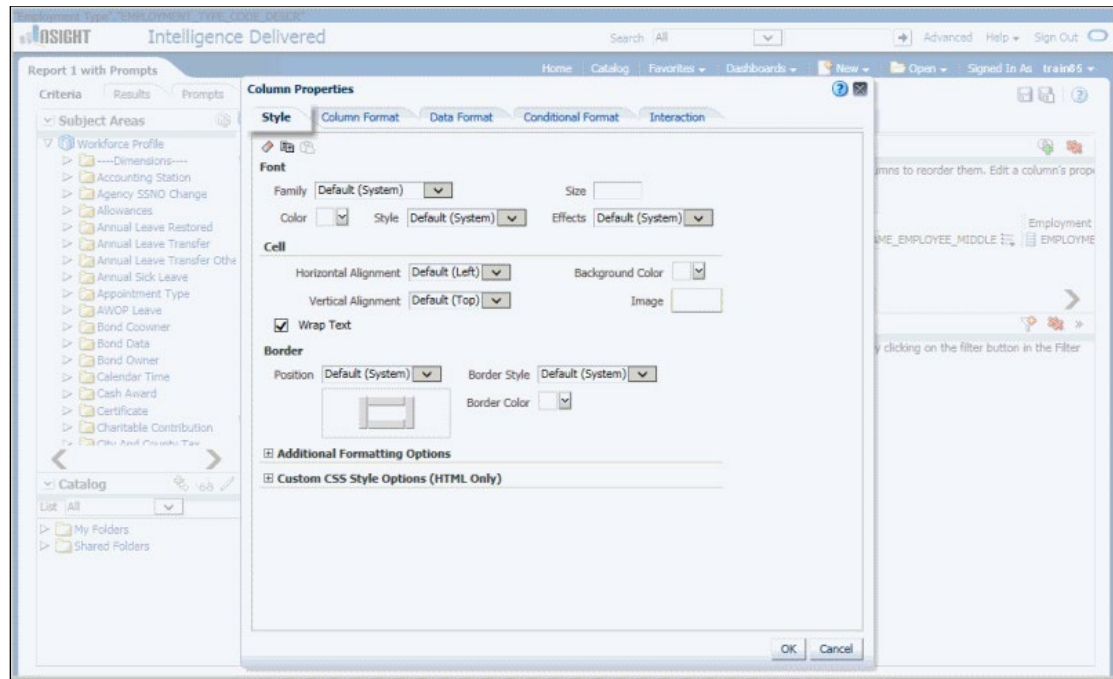


Figure 152: Final Report With New Conditions

## Using Styles

### To Use Styles:

1. Select the **Edit** icon from the desired data element.
2. Select **Column Properties** in the drop-down menu. The Column Properties popup appears.



**Figure 153: Style Tab Within the Column Properties**

3. View the Column Properties popup to format the properties of the data element as it appears within the report.
4. Select the **Style** tab on the Column Properties popup.
5. Select the applicable styles to apply.
6. Select OK to save the styles.

## Editing and Saving a Calculated Item

Calculated items may be edited and/or saved in Insight.

To Edit/Save a Calculated Item:

1. There is a dedicated option to save the calculated formula at the bottom of the Edit dialog from editing the Styles (the bottom option Save Column As).

A drop-down menu appears allowing the user to choose whether to edit the calculated item or save the calculated item to the Catalog.





Note: Insight will automatically recommend that the user saves the new calculated item to a folder with the title of the Subject Area from which the item was created (e.g., WFP). Users should comply with this recommended location to use the calculated item in future reports.

## Editing the Structure of a Graph in a Report

The structure of a graph may be edited within a report.

To Edit a Graph Using the Compound Layout Pane:

1. Select **Edit View** icon within the graph component of the report.

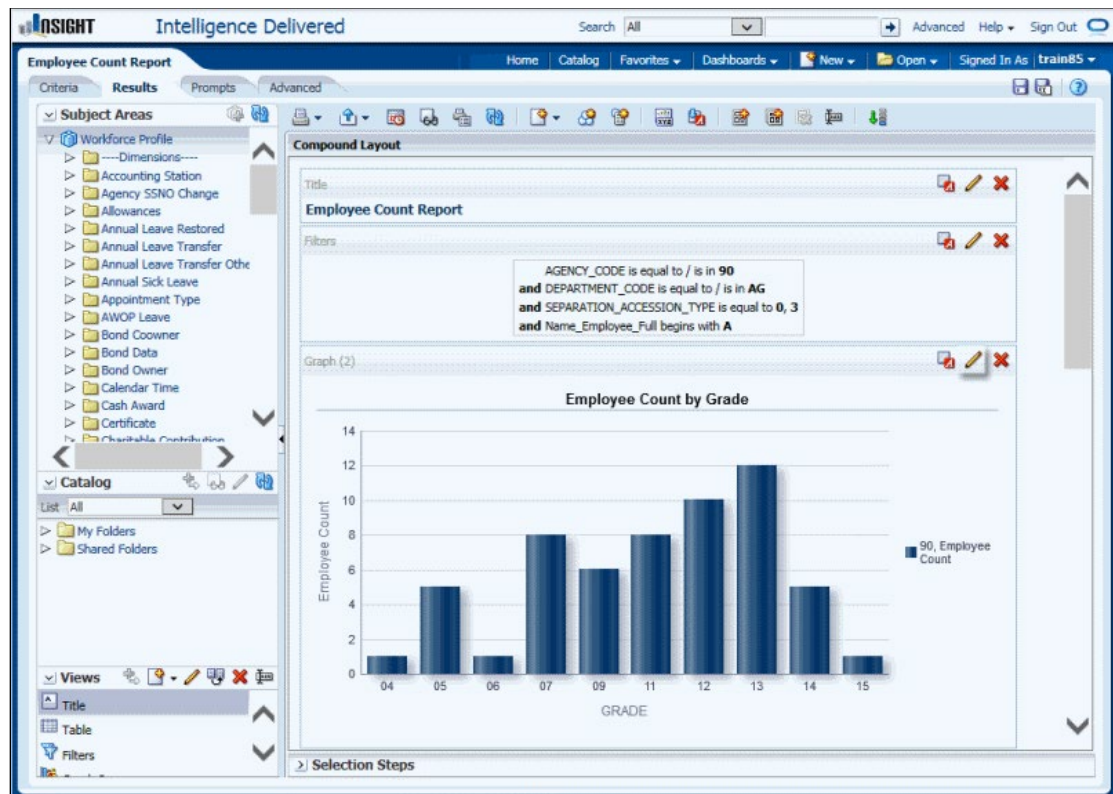


Figure 154: Graph Edit View Icon



2. Within the **Layout** pane, customize the structure of the graph by dragging data elements from the default graph section. The available options are:
  - **Graph Prompts:** Creates a prompt that will manipulate the data reflected in the graph.
  - **Sections:** Creates individual graphs for each value within the targeted data element or creates a slider bar.
  - **Bar Graph:** Defines the data elements that will display in the legend. Valid values are:
    - **Bars (Vertical Axis)**
    - **Group By (Horizontal Axis)**
    - **Vary Color By**
  - **Excluded:** Excludes certain data elements from the graph (data elements will still appear in the **Selected Columns** pane in the Criteria tab).

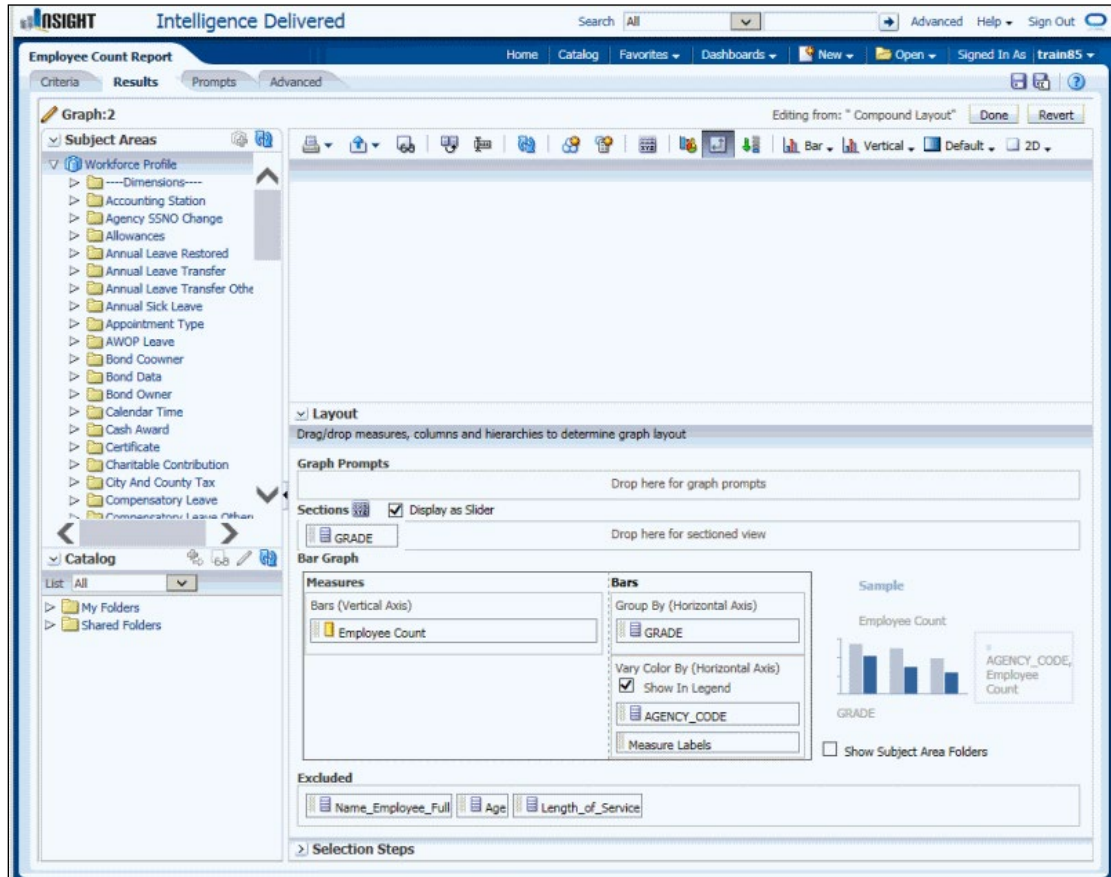


Figure 155: Graph Layout Pane

Note: The edits available within the Layout pane will change depending on the type of graph being modified.



## Creating a Graph for a Report

To Create a Graph for a Report:

1. Navigate to the **Results** tab of the ad hoc report editing page.

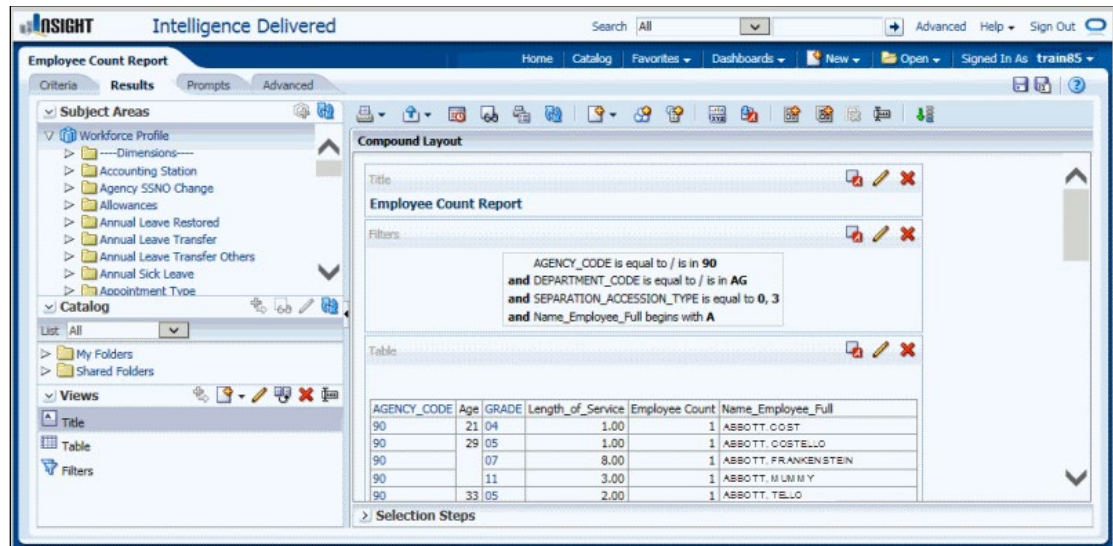


Figure 156: Results Tab for Ad Hoc Report

2. Select **New View** icon from the **Results** tab on the navigation bar. The New Icon option is displayed.

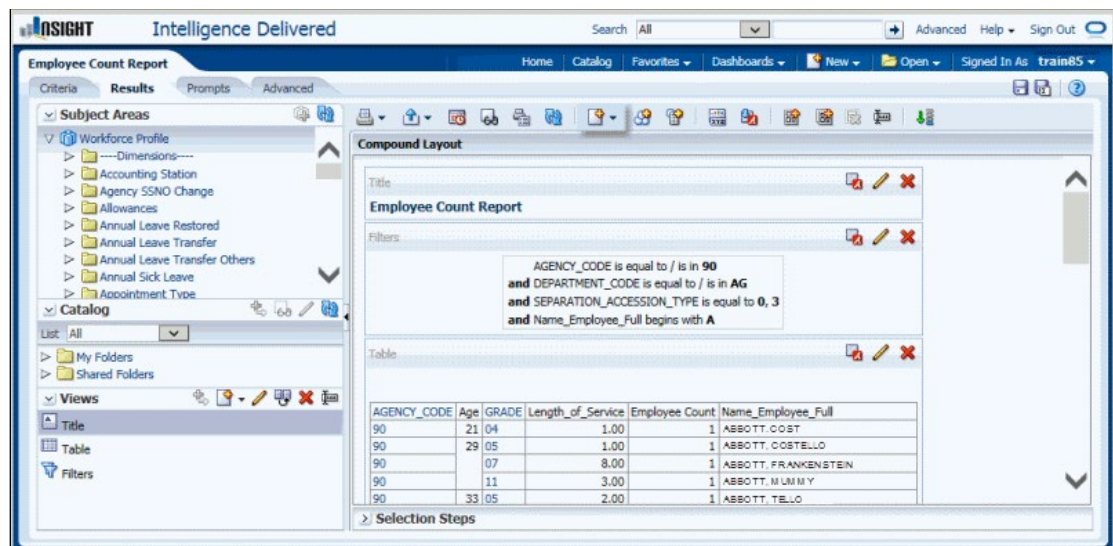


Figure 157: New View Icon

3. Select **Graph** from the drop-down menu.
4. Select the desired graph type. The Graph options are displayed.



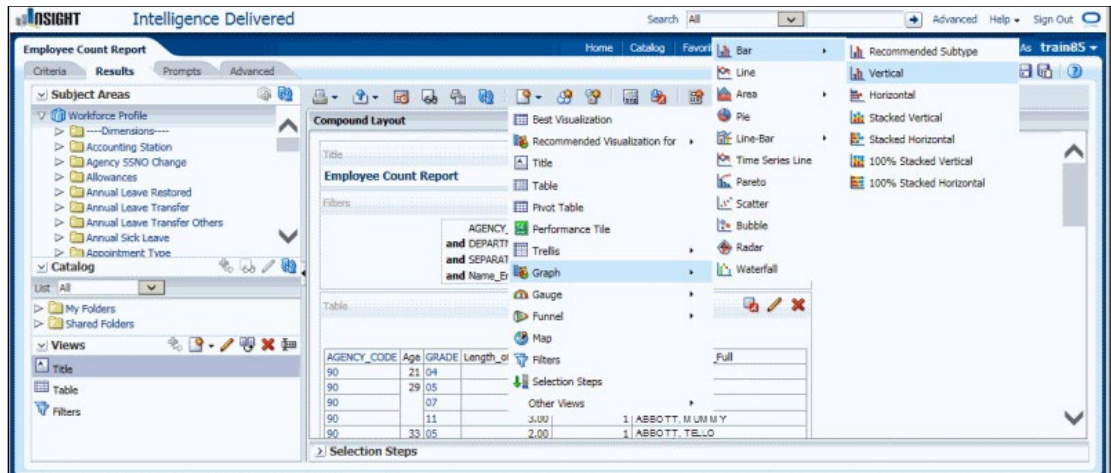


Figure 158: New View Drop-Down Menu

Note: Filters applied to this report and graph are displayed in the **Filter** pane located above the graph. This is only displayed if the user has created and placed a Filter object in the Results.

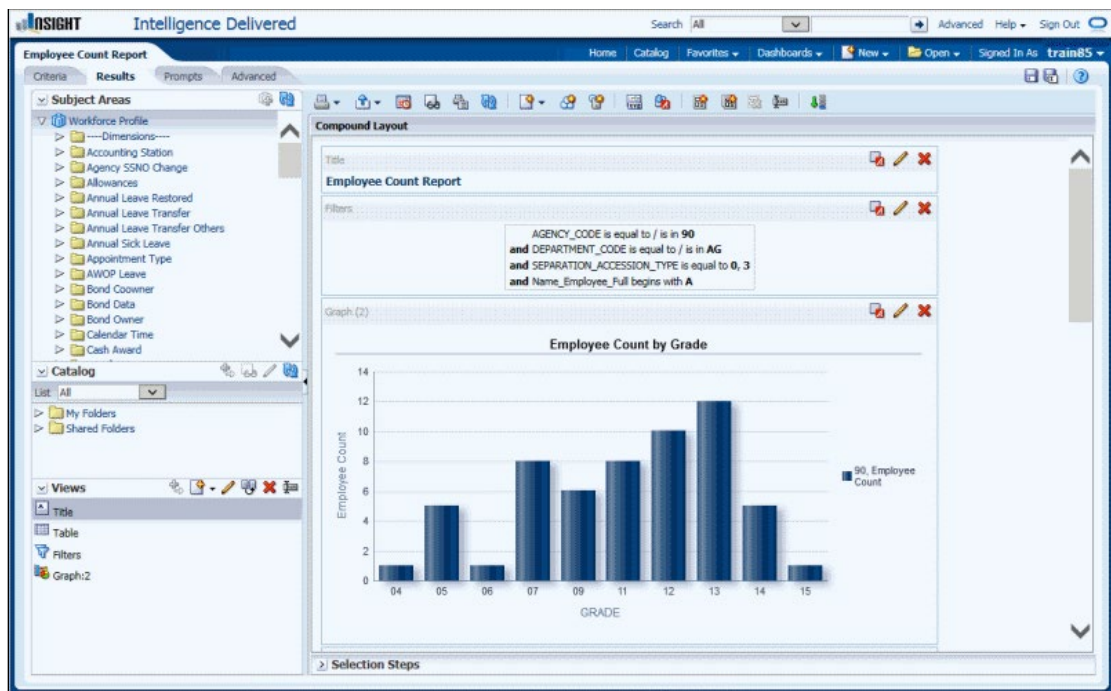


Figure 159: Initial Graph



## Creating a Slider

### To Create a Slider:

1. Drag a data element into Sections from the **Layout** pane within the **Results** tab.
2. Select the **Display as Slider** checkbox.
3. Select **Done**. The Slider is displayed.

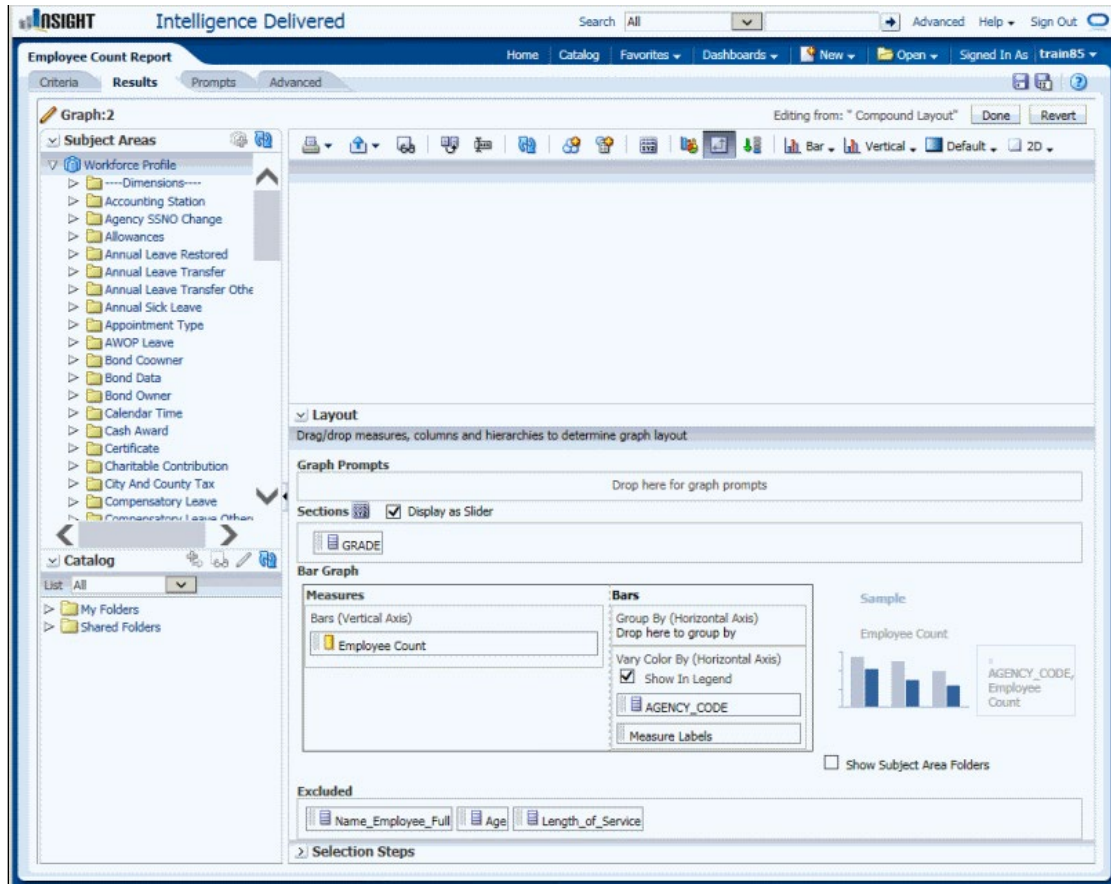


Figure 160: Sections Display as Slider Pane

4. View the updated graph with the **Slider**. The Slider marker value changes based on the position on the Slider.



Note: When time dimension data elements are part of a report, a Slider will allow the user to visually depict change over time.

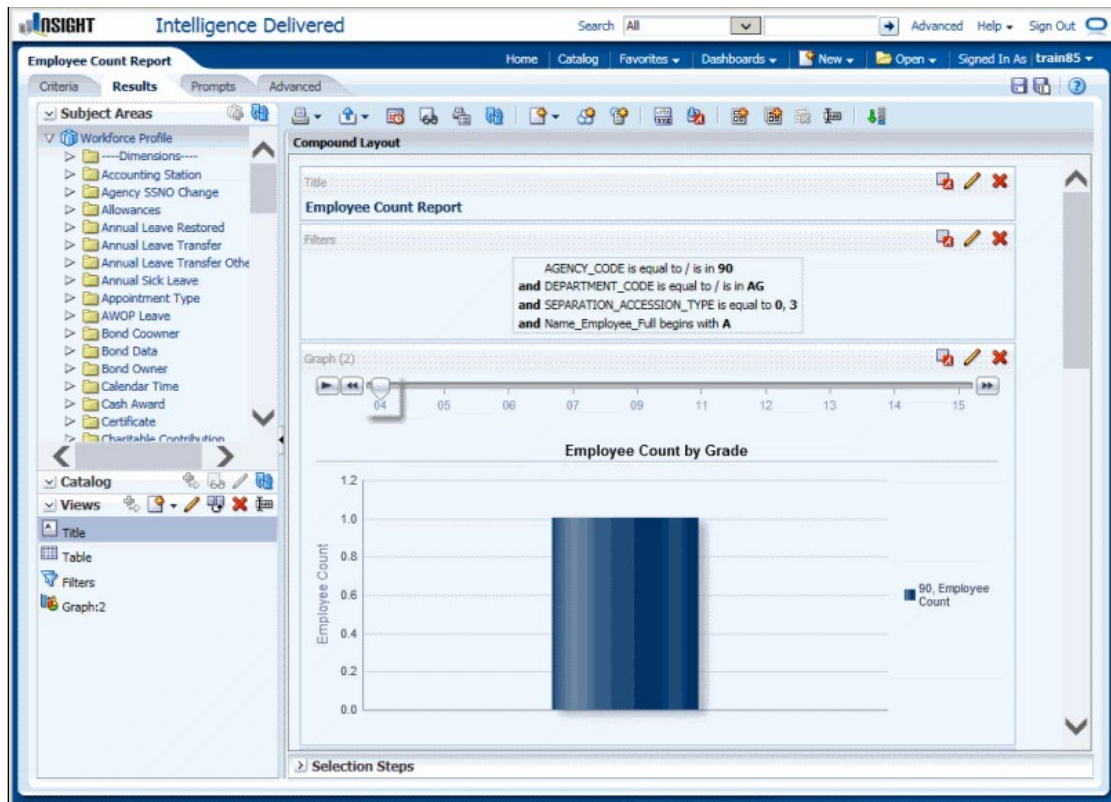


Figure 161: Customized Graph With Slider

### *Customizing the Styles and Formatting of a Graph in a Report*

To Customize Graph Properties:

1. Select the **Results** tab.
2. Select **Properties** icon in the **Results** tab navigation bar with the **Layout** pane open. The Results tab is displayed with the Properties.



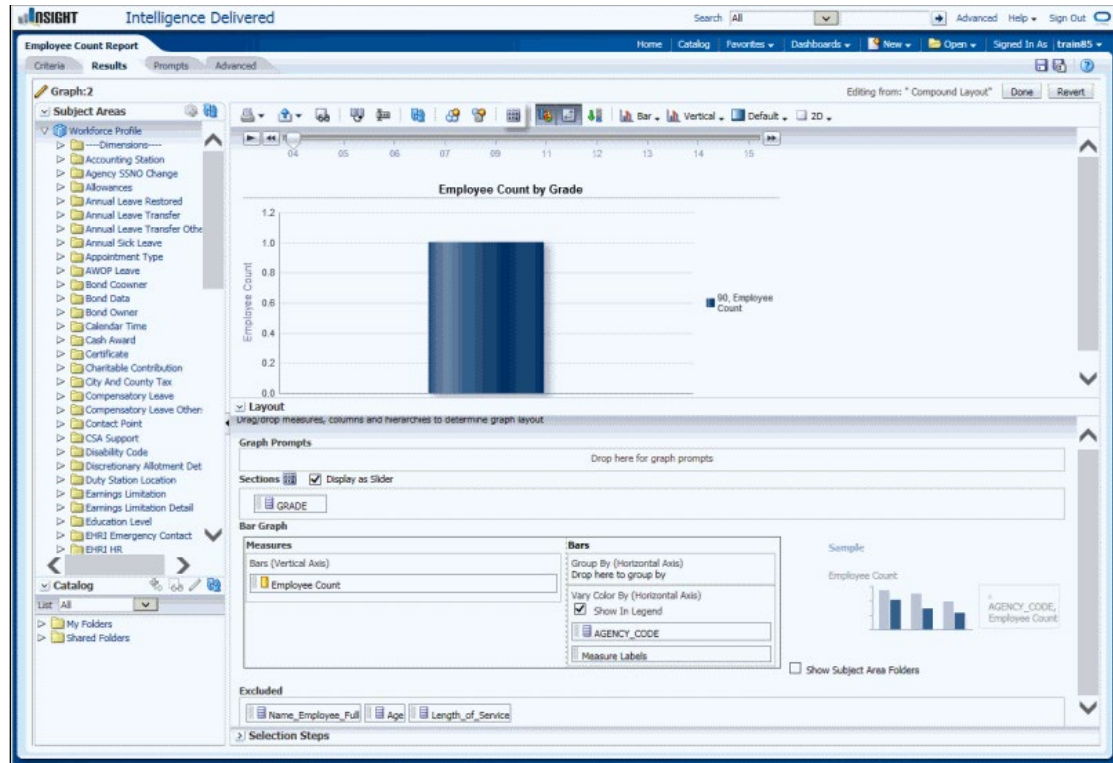


Figure 162: Properties Icon to Update Graph

Note: The icons within the **Results** tab navigation bar will update based on the type of graph.

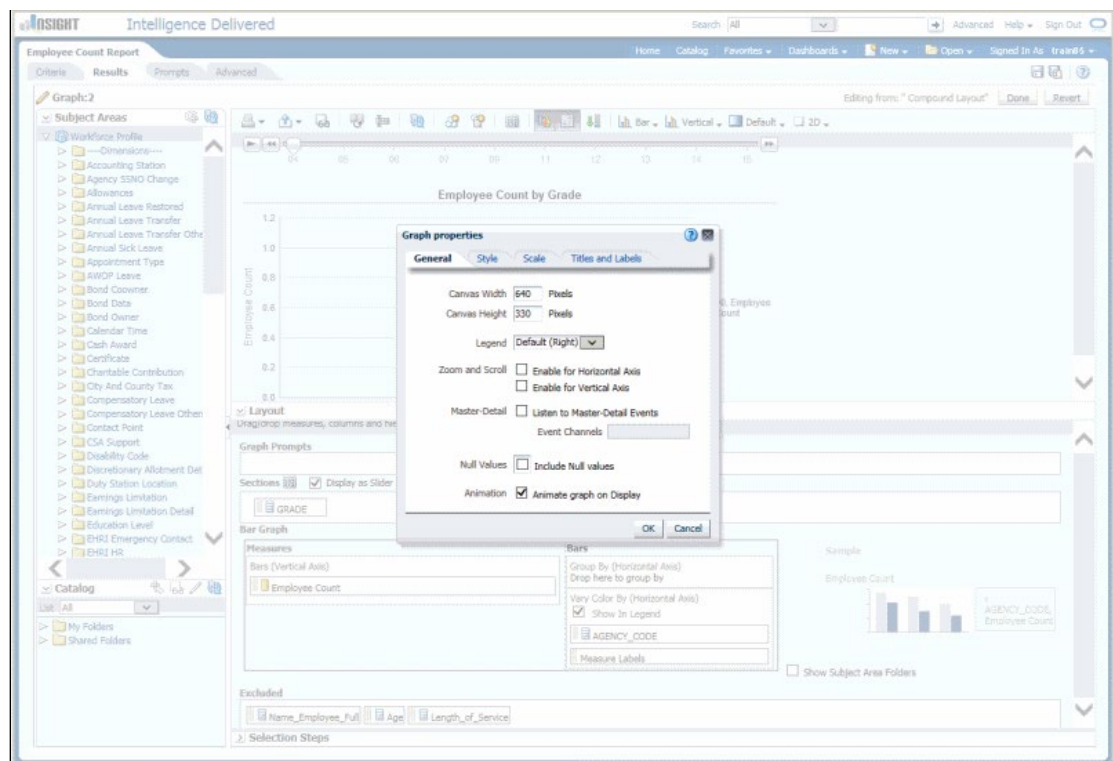


Figure 163: Graph Properties Window With Option Tabs



3. Use the Graph properties to customize stylistic properties of the graph. Valid values are:
  - **General:** Changes the position of the graph legend and enables/disables zooming on the graph.
  - **Style:** Customizes the graph's appearance, such as formatting the plot area, legend, and background.
  - **Scale:** Sets the scale and scale markers in the graph.
  - **Titles and Labels:** Edits the title, axis titles and graph labels.

## Sorting Data Within a Report

Sorts may be applied to one or more columns.

### To Sort Data within a Report:

1. Select the **Edit** icon for the targeted data element from the Selected Columns pane.
2. Select **Sort** in the drop-down menu to select from the available sorting options. Valid values are:
  - **Sort Ascending:** Allows users to add the first sort in a column in ascending order.
  - **Sort Descending:** Allows users to add the first sort in a column in descending order.
  - **Add Ascending Sort:** Allows users to add an additional sort to the report that orders the values in ascending order.
  - **Add Descending Sort:** Allows users to add an additional sort to the report that orders the values in descending order.
  - **Clear Sort:** Clears a sort for that specific column.
  - **Clear All Sorts in All Columns:** Clears all sorts in a report.
3. Select **Sort Ascending** or **Sort Descending** to set the primary sort. The **Attribute** icon will update indicating the sort and whether it is the primary (1), secondary (2), etc.

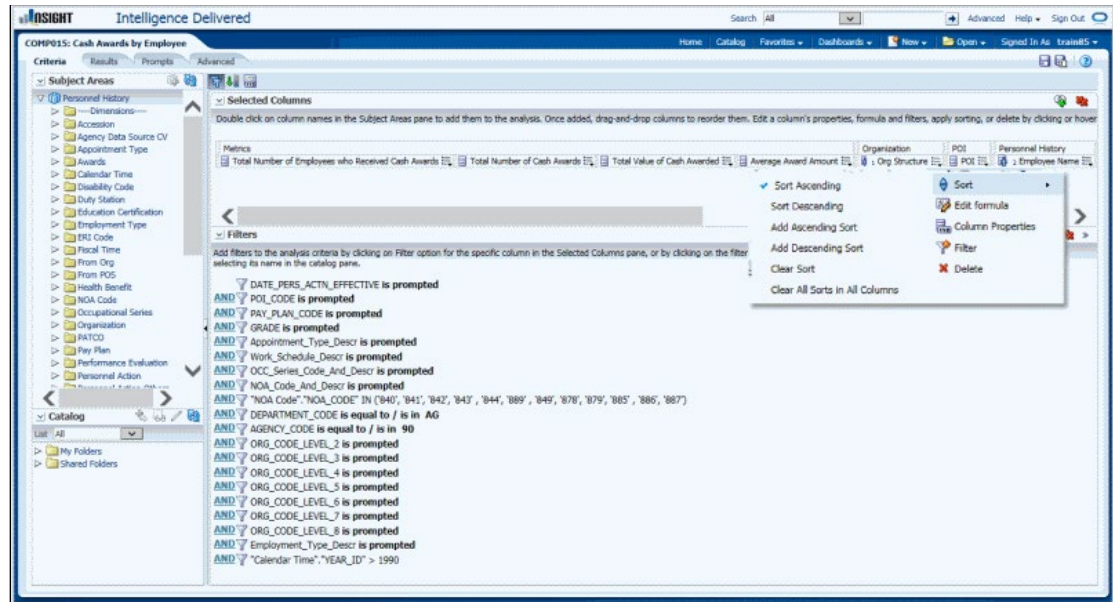


Figure 164: Sort Options Within the Edit Icon From the Selected Columns

## Adding New Views to a Report

Users can update reports with disclaimers or additional content to communicate information in a new or different way. The New View drop-down menu includes several view options.

### To Add New Views to a Report:

Users can update reports with disclaimers or additional content to communicate information in a new or different way. The New View drop-down menu includes several view options.

1. Navigate to the **Results** tab of the ad hoc report editing page. The Results page is displayed.

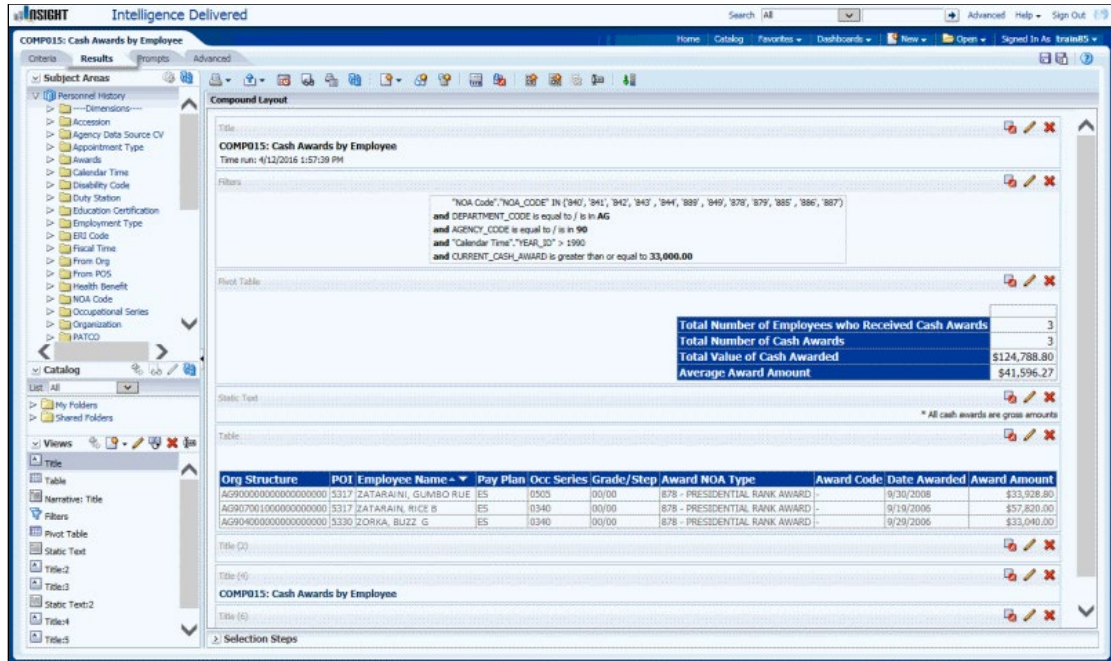

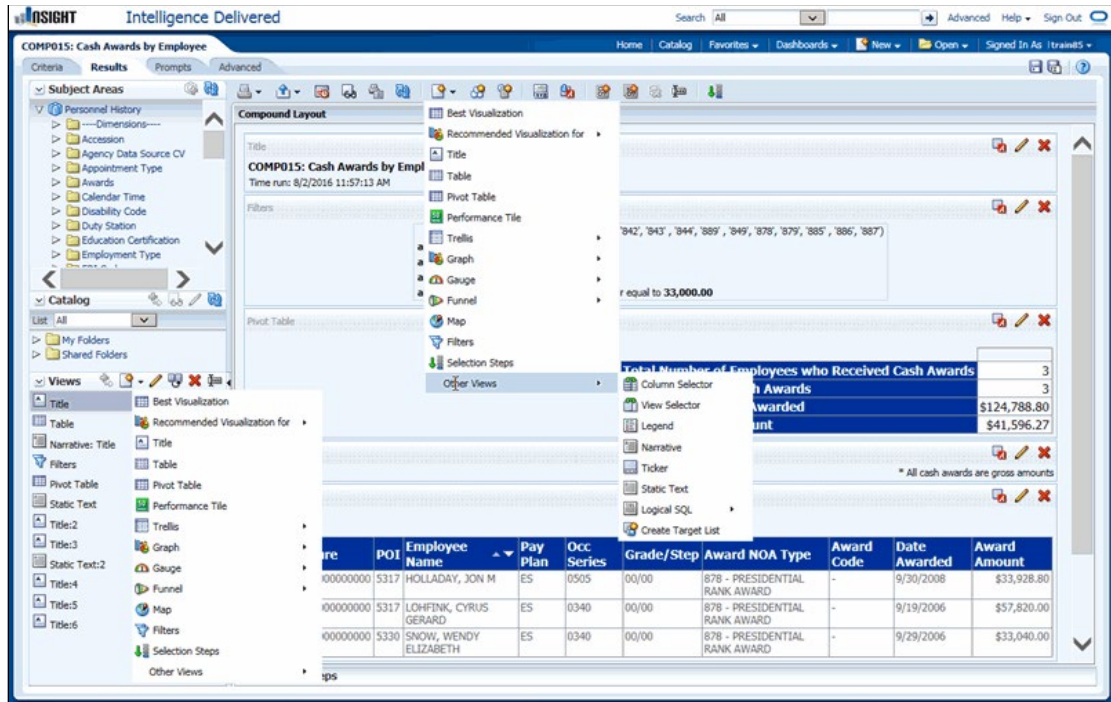


Figure 165: Results Tab

2. Select **New View** icon in the top navigation bar or Views pane for additional report components. The New View option is displayed. Below is a description of the New View option.

Icon Name	Definition	Icon
New View	Displays a menu of additional components (e.g., graph, static text) to include in a report.	



**Figure 166: Add Context to an Existing Report**

Listed below are the common additions to a report.

- **Title:** Displays a title of the report (e.g., Employee Profile Report) and/or indicates the date and time a report is run.
- **Table:** Displays the results in a visual representation of data organized by rows and columns.
- **Pivot Table:** Displays the results in a pivot table, which provides a summary view of data in cross-tab format.
- **Graph:** Displays the results in a graph for intuitive analysis, (e.g., pie charts, bar charts, and line charts).
- **Filters:** Records a list of filters applied to the report (e.g., employee count is greater than 100).
- **Map Viewer:** Used to depict data in a variety of scenarios (e.g., identify the number of employees in a given geographical area after a natural disaster).
- **Other Views:** Provides a drop-down list of additional views available.
- **Narrative:** Displays the results as one or more paragraphs of text (e.g., in a form letter you can type in a sentence with placeholders for specific columns in the results).
- **Static Text:** Displays a text component on the report (e.g., Personally Identifiable Information (PII) Do Not Distribute).





## Formatting and Customizing Reports

### Formatting and customizing a report:

- Maintains consistency across reports
- Highlights data and shows synopsis of data
- Makes reports visually engaging and organized
- Enhances clarity of reports

## Customizing Report Structure

### To Customize the Report Structure:

1. Select the **Results** tab.
2. Navigate to the Layout Pane.
3. Select **Edit View** icon corresponding to the table from the **Results** tab of the **ad hoc report editing** page.

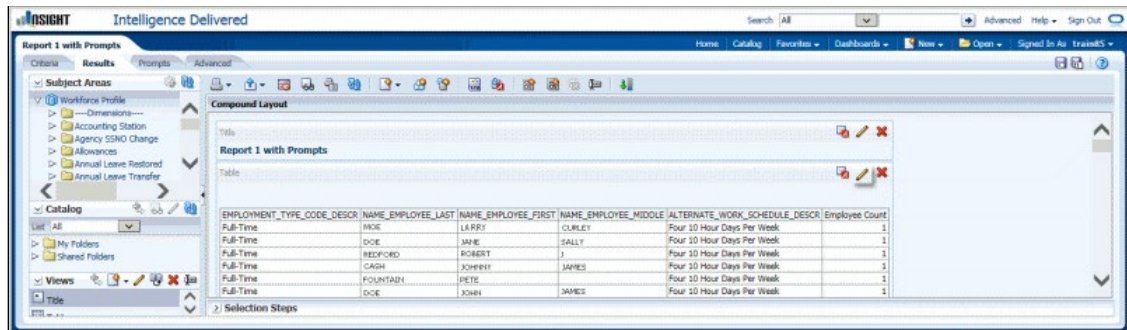


Figure 167: Ad Hoc Table Edit View Icon

4. View the **Layout** pane which provides users with several ways to customize the structure of a report.



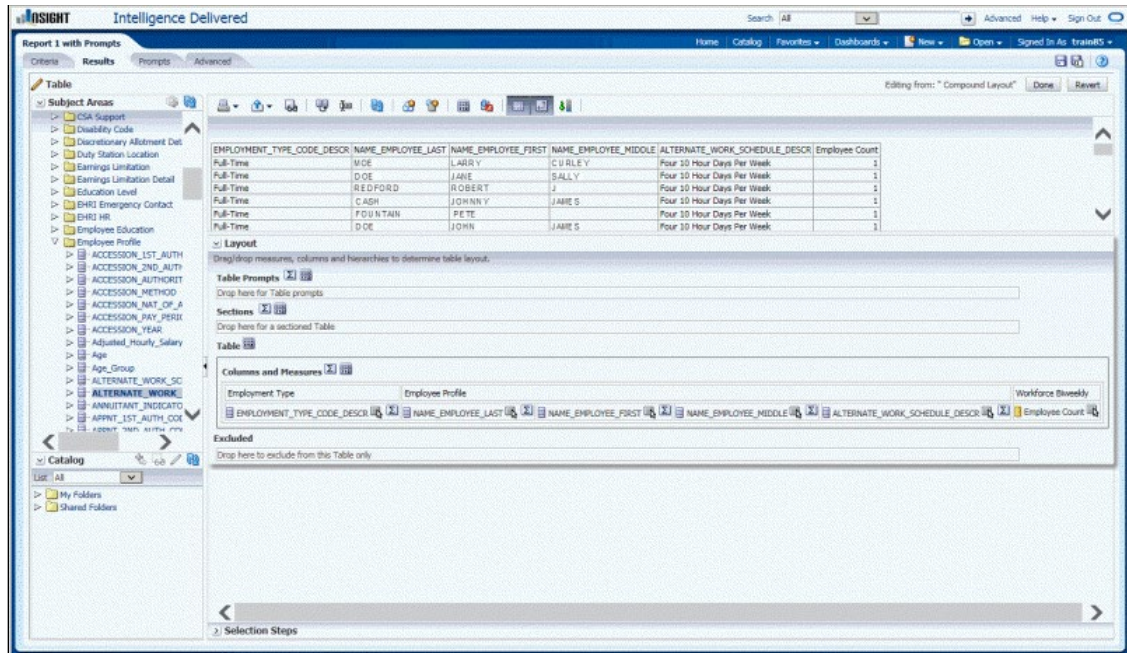


Figure 168: View Table Layout Pane

5. Expand the **Layout** pane by selecting the gray bar along the top and dragging up. This will reveal the remaining contents of the **Layout** pane.
  - **Table Prompts:** Creates a drop-down menu to allow users to manipulate how data is restricted in a report by toggling between values.
  - **Sections:** Separates the report table into individual segments based on a specific data element.
  - **Table:** Edits the styles and formatting of the table (cell color, borders, etc.).
  - **Columns and Measures:** Adds sums and formats headings/values, etc.
  - **Excluded:** Temporarily removes columns from appearing in the table (data elements will remain in the Selected Columns pane in the Criteria tab).

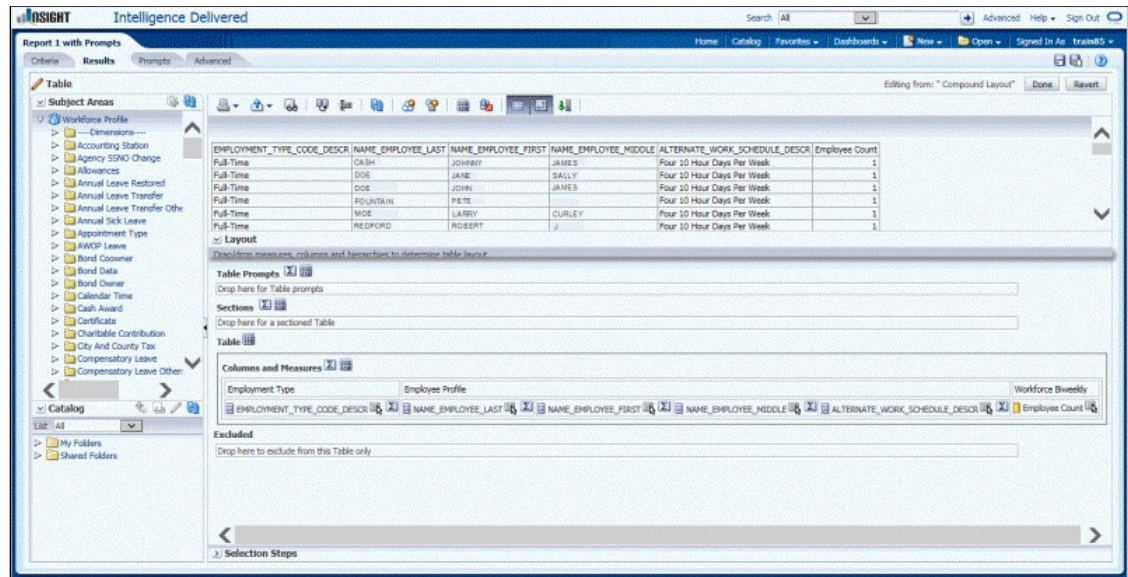


Figure 169: Expand Gray Bar on Layout Pane

## Creating Sections

### To Create Sections:

1. Select the **Results** tab.
2. Navigate to **Sections** on the **Layout** pane. This allows users to create multiple tables that are defined by a particular data element.

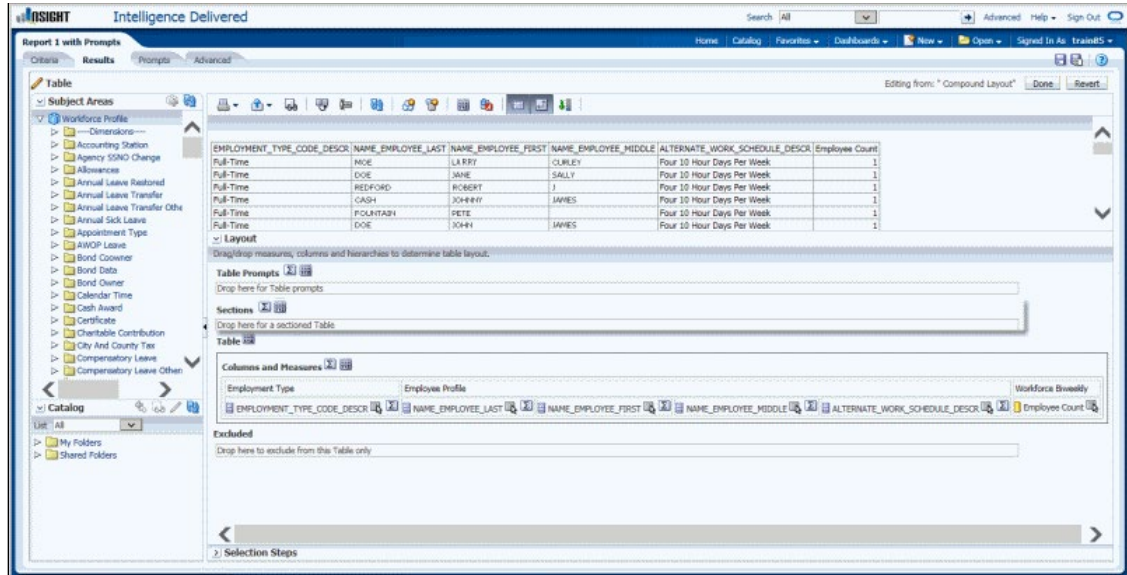


Figure 170: Sections in the Layout Pane

3. Drag and drop a data element from Columns and Measures to Sections.

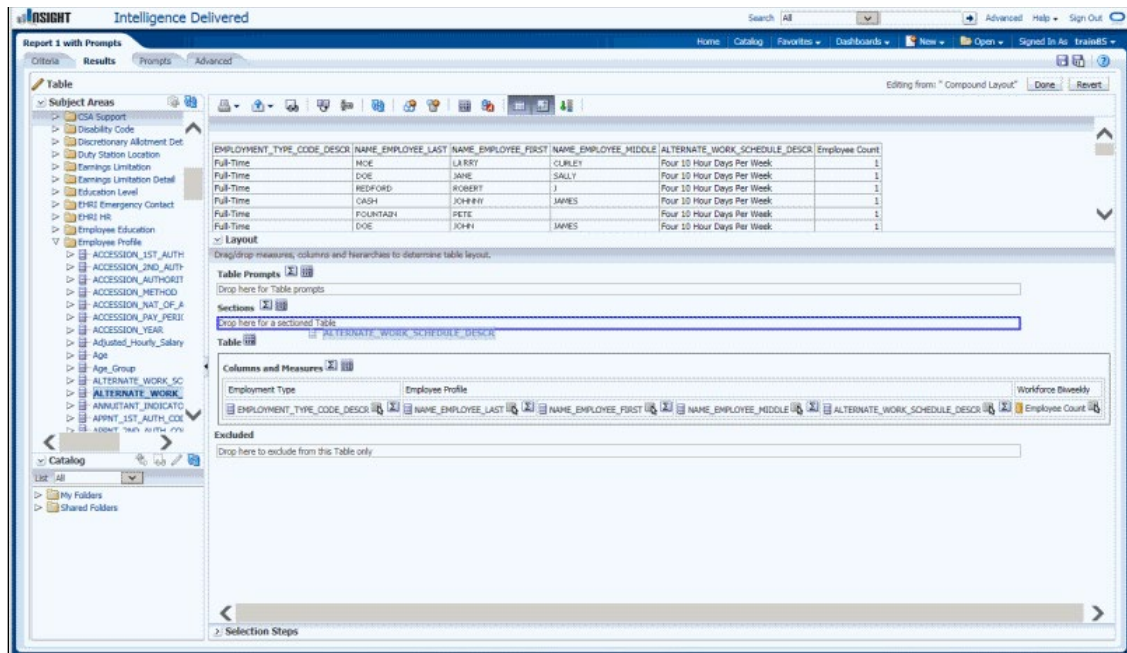


Figure 171: New Positions in the Layout Pane

Note: As you drag items to new positions in the Layout pane, the highlight bar will indicate the new position once you drop the item.

4. Select **Properties** icon to open the Section Properties popup within Sections.



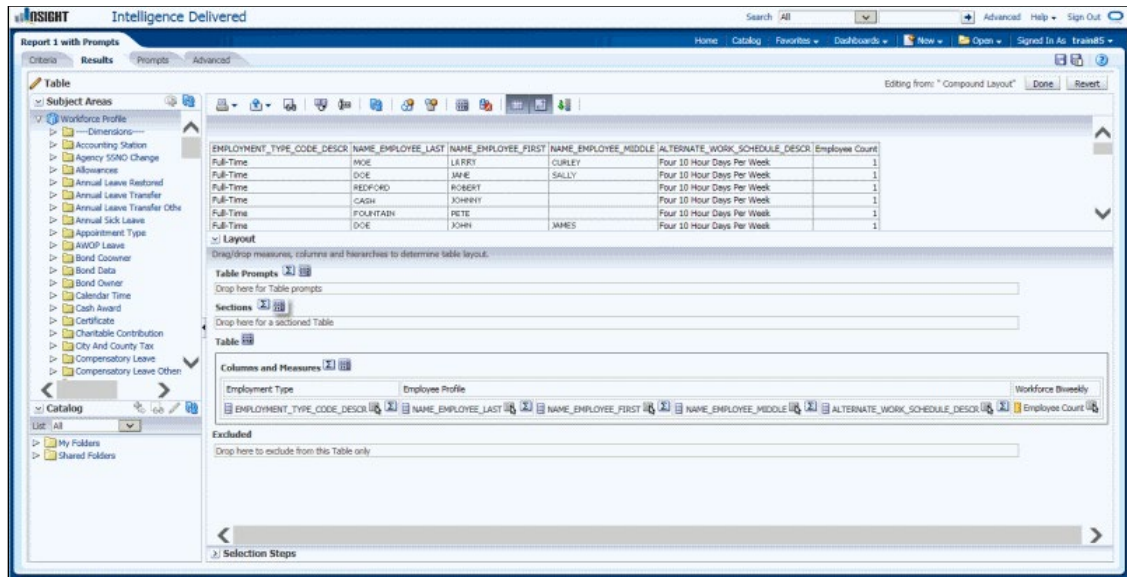


Figure 172: Properties Icon to Open the Section Properties Window

Icon Name	Definition	Icon
Properties	Displays a menu of options to format a component of a report or dashboard. Options will vary depending on the type of component a user is editing.	

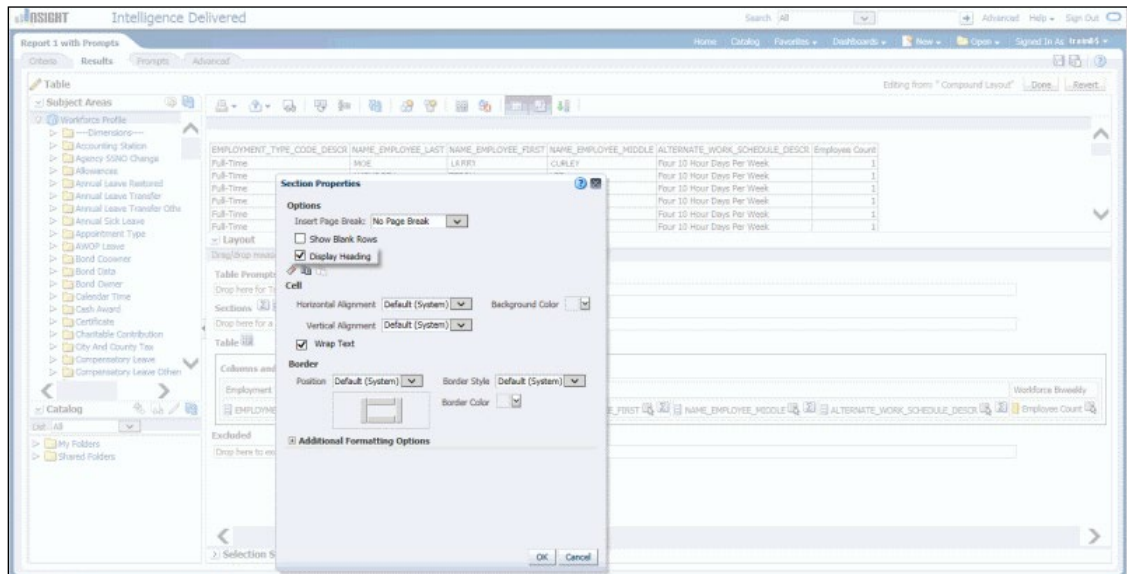


Figure 173: Section Properties Window With the Display Heading Check Box

5. Select the **Display Heading** checkbox to display the data element name in the section title.
6. Select **OK** to close the popup.
7. View the new Sections heading.

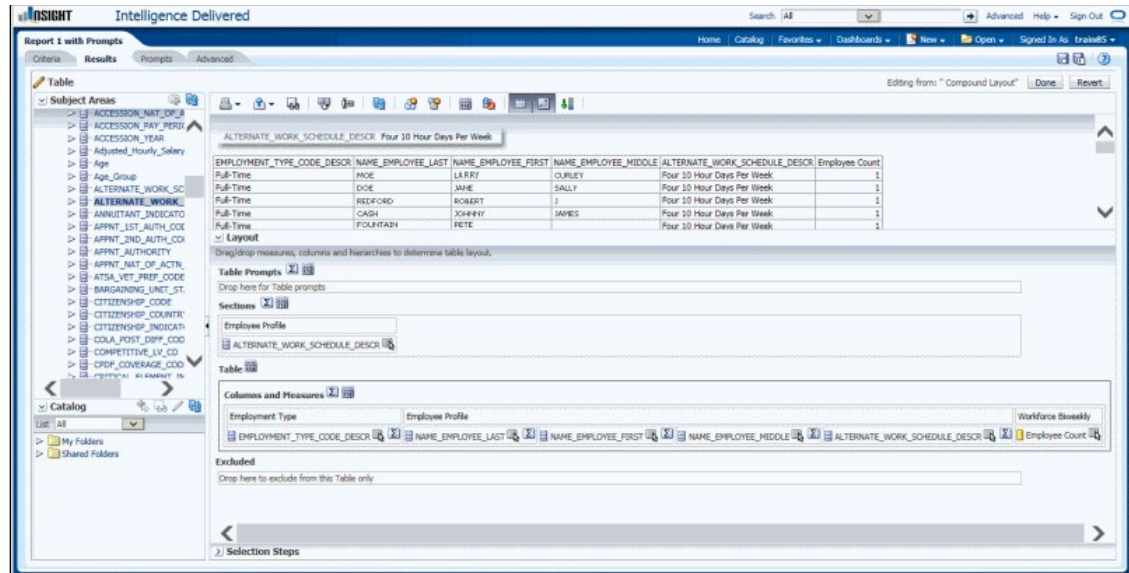


Figure 174: New Section Heading

8. Select the **Sections Totals** icon to view a menu of options that add and customize Totals in Sections.

Valid values are:

- **None:** Defaults without a summary table.
- **Before:** Adds a summary table to a report before the Sections.
- **After:** Adds a summary table to a report after the Sections.
- **Format Labels:** Allows users to customize the label caption or apply stylistic formatting (e.g., font, color) to distinguish labels.
- **Format Values:** Allow users to customize the stylistic formatting (e.g., font, color) to distinguish the values associated with the sum.

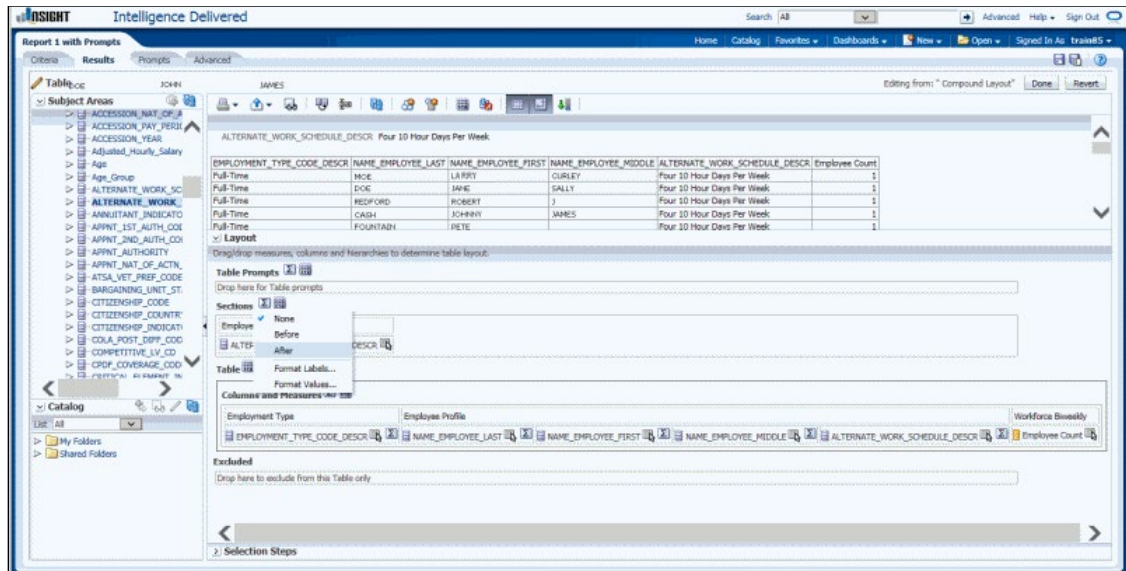


Figure 175: Section Totals Drop-Down Menu

Icon Name	Definition	Icon
Totals	Displays a menu of options to apply Sub-Totals and/or Grand Totals in a table.	

9. Select **Done** in the upper right corner of the page to view the Sections Layout.

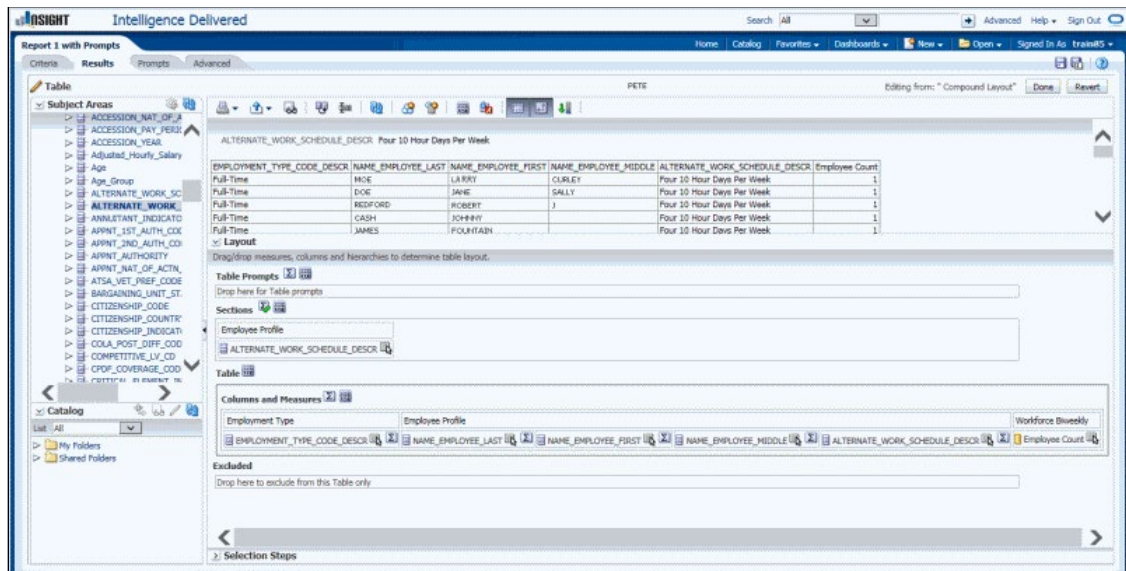


Figure 176: Final Sections Layout





## Applying Columns and Measures to a Report

### To Apply Columns and Measures to a Report:

1. Select the **Results** tab.
2. Navigate to the Columns and Measures section from the Layout pane. Within this section, a user can customize Totals for the overall table or for a specific data element.

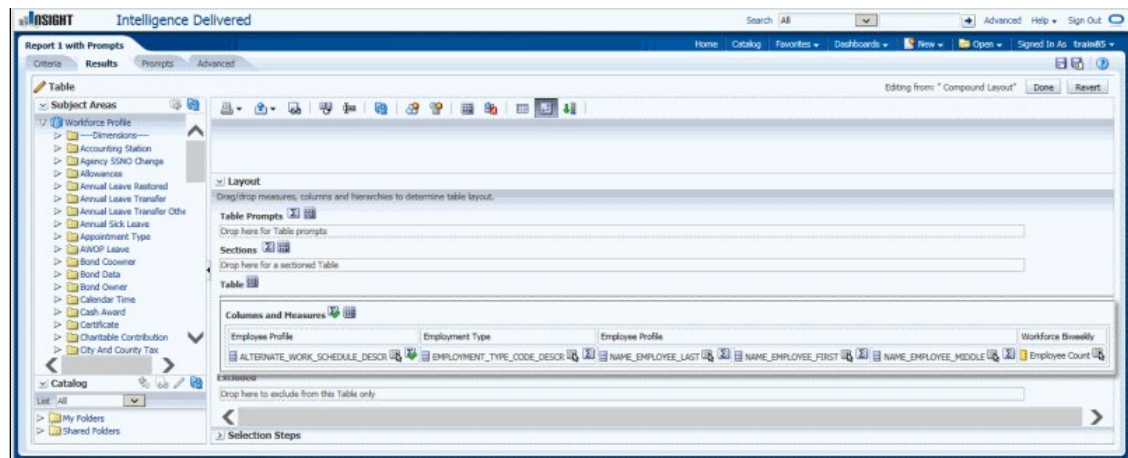


Figure 177: Columns and Measures on the Layout Pane

Note: By adding Totals at the Columns and Measures section, users can apply a Grand Total. Applying Totals at the data element level applies Sub-Totals for an individual data element.

3. Select the **Totals** icon next to the Columns and Measures title to add a Grand Total to the table and format the styles and formatting of both the Grand Total labels and values. Valid values are:
  - **None:** Defaults without a Grand Total in the table.
  - **After:** Adds a Grand Total to the final row in a table.
  - **Format Labels:** Allows users to customize the label caption or apply stylistic formatting (e.g., font, color) to distinguish labels.
  - **Format Values:** Allows users to customize stylistic formatting (e.g., font, color) to distinguish the values associated with the Grand Total.

Note: Totals functionality can only be used if there is a measure data element in the report.

Icon Name	Definition	Icon
<b>Totals</b>	Displays a menu of options to apply sub-totals and/or grand totals in a report table.	



4. Select the **Totals** icon.
5. Select **Format Labels**.

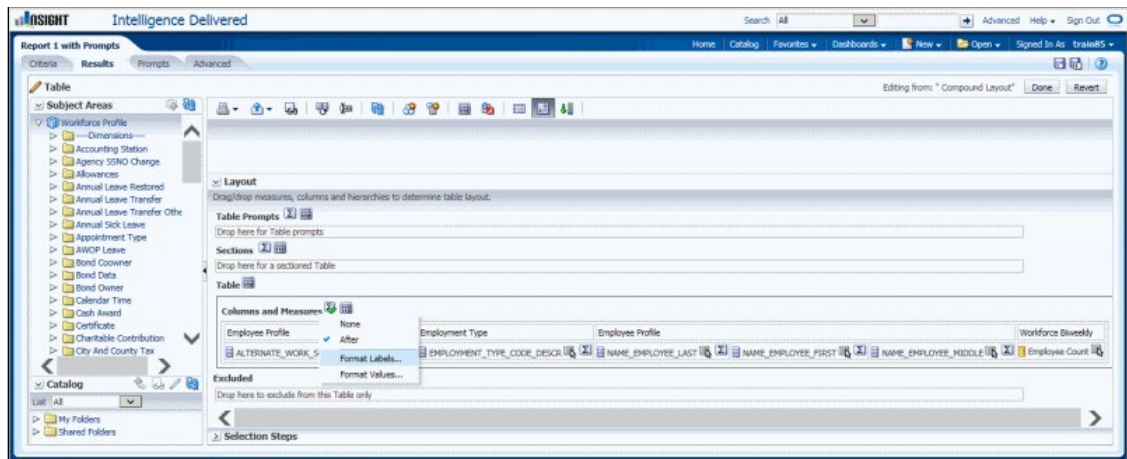


Figure 178: Columns and Measures Totals Drop-Down Menu

The Edit Format popup appears allowing users to update the caption and formatting of the Grand Total label.

6. Select **OK** on the Edit Format popup to close the popup and return to the Results tab.

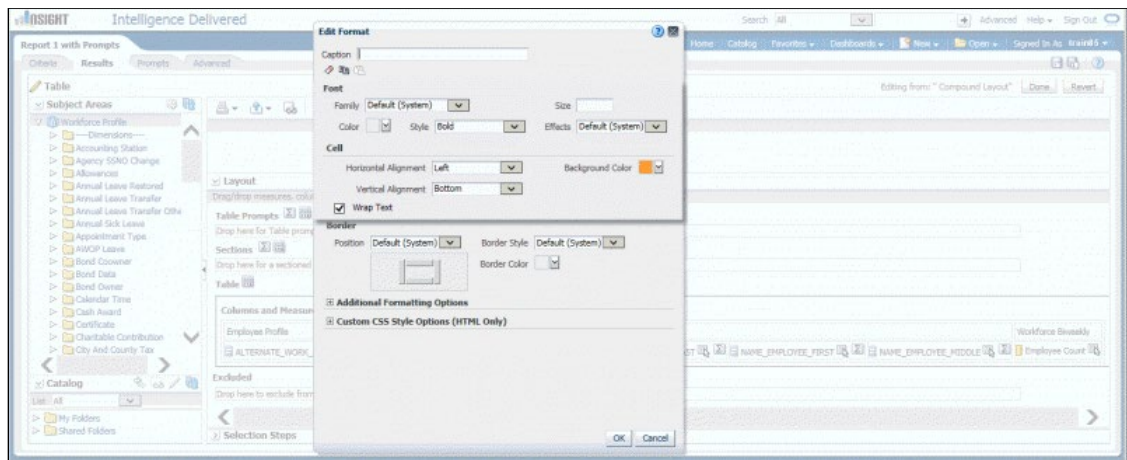


Figure 179: Columns and Measures Edit Format Window



The report will update with the Grand Total at the end of the table.

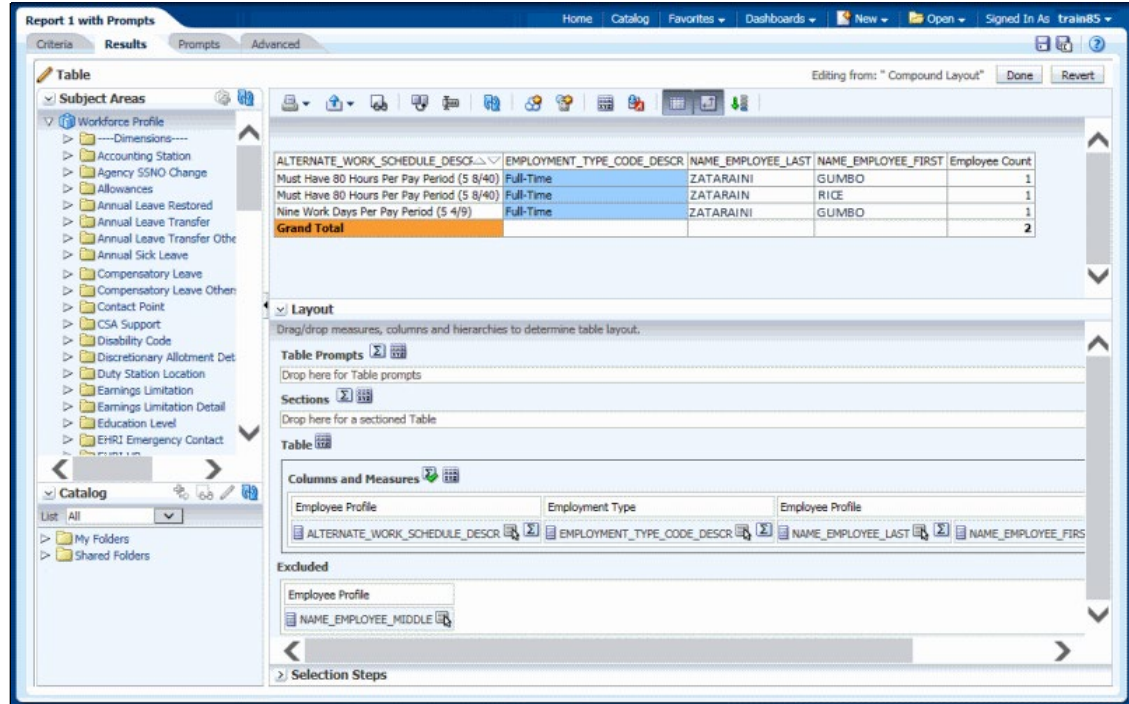


Figure 180: Formatted Grand Total

7. Select the **Totals** icon adjacent to the targeted data element.
8. Select **After** to apply Sub-Totals following each data element.

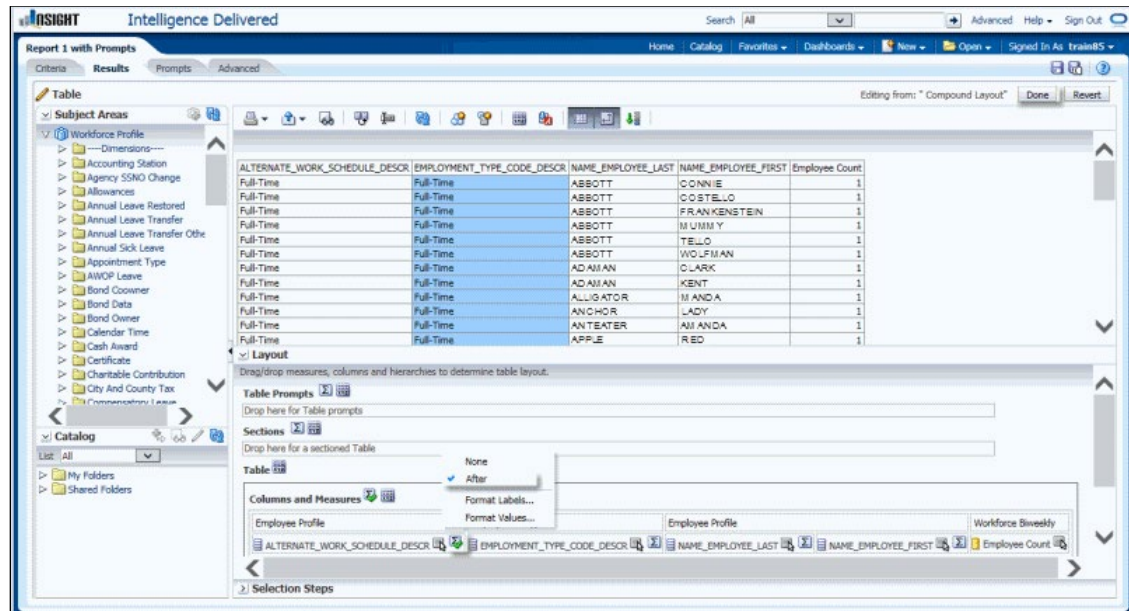


Figure 181: Total After Drop-Down Menu Options for a Data Element





Displayed is the updated table with Sub-Totals following the targeted data element.

The screenshot shows the 'Report 1 with Prompts' interface. The table displays data with sub-totals. The layout configuration panel on the right shows the table structure and column measures.

ALTERNATE_WORK_SCHEDULE_DESCR	EMPLOYMENT_TYPE_CODE_DESCR	NAME_EMPLOYEE_LAST	NAME_EMPLOYEE_FIRST	Employee Count
Must Have 80 Hours Per Pay Period (5 8/40)	Full-Time	ZATARAINI	GUMBO	1
Must Have 80 Hours Per Pay Period (5 8/40)	Full-Time	ZATARAIN	RICE	1
<b>Must Have 80 Hours Per Pay Period (5 8/40) Total</b>				<b>2</b>
Nine Work Days Per Pay Period (5 4/9)	Full-Time	ZATARAINI	GUMBO	1
<b>Nine Work Days Per Pay Period (5 4/9) Total</b>				<b>1</b>
<b>Grand Total</b>				<b>2</b>

**Layout Configuration:**

- Table Prompts:** Drop here for Table prompts
- Sections:** Drop here for a sectioned Table
- Table:**
- Columns and Measures:**
  - Employee Profile: Employee Profile
  - Employment Type: EMPLOYMENT\_TYPE\_CODE\_DESCR
  - Employee Profile: NAME\_EMPLOYEE\_LAST, NAME\_EMPLOYEE\_FIRST
  - Workforce Biweekly: Employee Count
- Excluded:** Employee Profile, NAME\_EMPLOYEE\_MIDDLE

Figure 182: Formatted Sub-Totals in the Table

9. Select **Done**. The completed report is displayed with the Grand Total row.

The screenshot shows the 'Report 1 with Prompts' interface with the final report displayed. The table includes a Grand Total row.

ALTERNATE_WORK_SCHEDULE_DESCR	EMPLOYMENT_TYPE_CODE_DESCR	NAME_EMPLOYEE_LAST	NAME_EMPLOYEE_FIRST	Employee Count
Must Have 80 Hours Per Pay Period (5 8/40)	Full-Time	ZATARAINI	GUMBO	1
Must Have 80 Hours Per Pay Period (5 8/40)	Full-Time	ZATARAIN	RICE	1
<b>Must Have 80 Hours Per Pay Period (5 8/40) Total</b>				<b>2</b>
Nine Work Days Per Pay Period (5 4/9)	Full-Time	ZATARAINI	GUMBO	1
<b>Nine Work Days Per Pay Period (5 4/9) Total</b>				<b>1</b>
<b>Grand Total</b>				<b>2</b>

Figure 183: Final Report for Columns and Measures



## Excluding Data Elements

### To Exclude Data Elements:

1. Select the **Results** tab.
2. Drag a data element to Excluded from the **Layout** pane. Data elements located in Excluded will not appear as columns within the table.

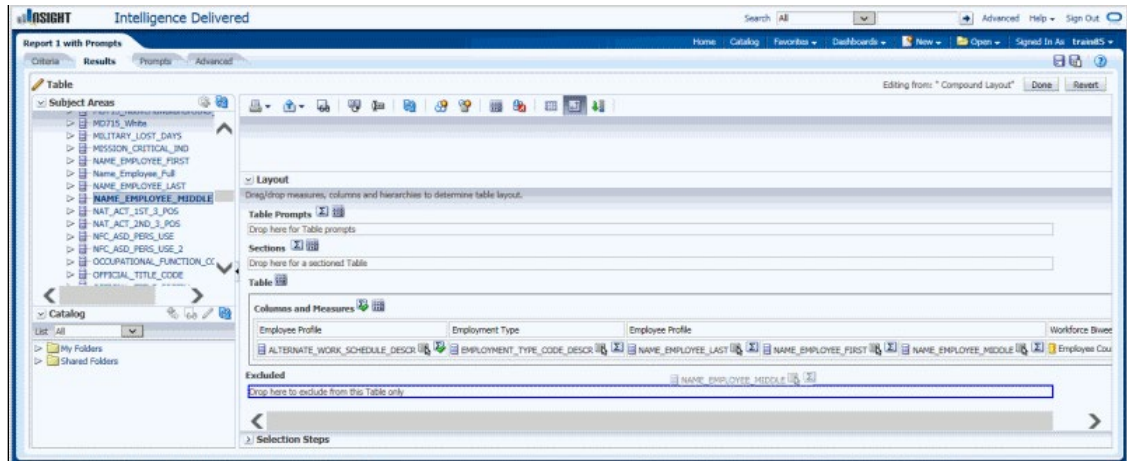


Figure 184: Excluded Data Element From the Columns and Measures Pane



Note: Excluding a column prevents the data element from displaying as a column within the table; however, the data element will still appear in the Selected Columns pane within the Criteria tab.

ALTERNATE_WORK_SCHEDULE_DESCR	EMPLOYMENT_TYPE_CODE_DESCR	NAME_EMPLOYEE_LAST	NAME_EMPLOYEE_FIRST	Employee Count
Four 10 Hour Days Per Week	Full-Time	MOE	LARRY	1
Four 10 Hour Days Per Week	Full-Time	DOE	JANE	1
<b>Four 10 Hour Days Per Week Total</b>				<b>2</b>
Must Have 40 Hours Per Week	Full-Time	REDFORD	ROBERT	1
Must Have 40 Hours Per Week	Full-Time	CASH	JOHNNY	1
<b>Must Have 40 Hours Per Week Total</b>				<b>2</b>
Must Have 80 Hours Per Pay Period (5 8/40)	Full-Time	FOUNTAIN	PETE	1
Must Have 80 Hours Per Pay Period (5 8/40)	Full-Time	STEWART	ROD	1
Must Have 80 Hours Per Pay Period (5 8/40)	Full-Time	GAYE	MARVIN	1
Must Have 80 Hours Per Pay Period (5 8/40)	Full-Time	JAGGAR	MICK	1

Figure 185: Excluded Data Element

3. Select **Done** to close the **Layout** pane and return to the **Results** tab.
4. Users can also select **Revert** to abandon the edits made in the **Layout** pane.

Figure 186: Layout Pane Done and Revert Buttons





## Import Formatting

### To Format Imports:

1. Select the **Results** tab. The Results tab is displayed.
2. Select **Import Formatting** icon from the **Results** tab of the *ad hoc report editing* page.

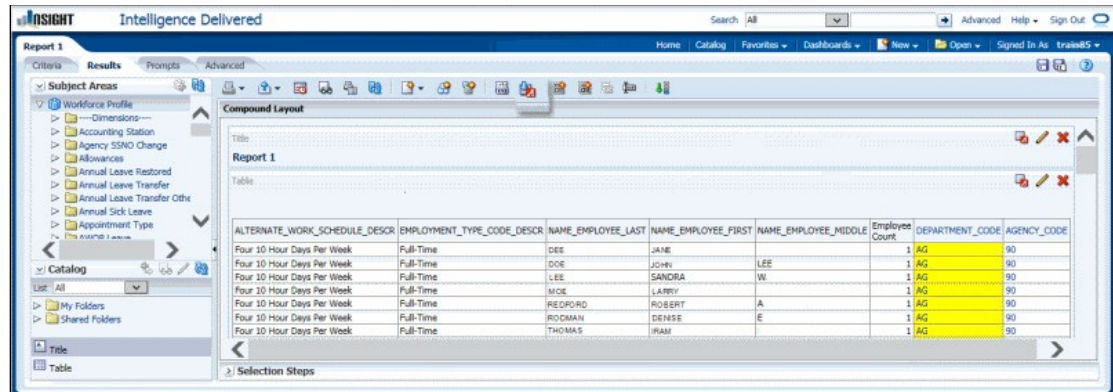


Figure 187: Import Formatting From Another Analysis Icon

Note: This option applies formatting to all the components of a report. The text from the report will also be imported (e.g., if the static text from an existing report reads "PII", then when the formatting is imported the new static text will also read "PII").

3. Use the Select Analysis page to navigate to the **Folders** pane.

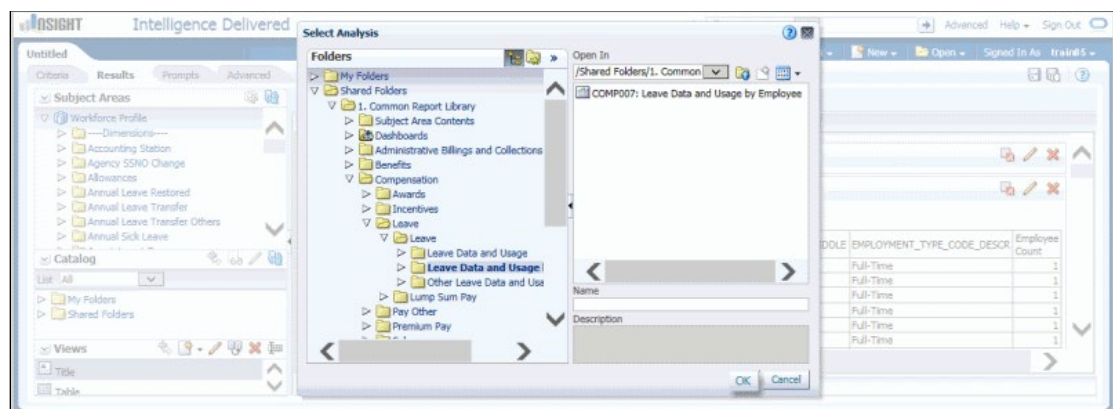


Figure 188: Select Analysis Window With Folders Pane

4. Select the report with the desired format.
5. Select **OK** to close the popup.
6. View the updated report with the applied formatting (e.g., font styles, colors, data format) from the selected report.



Report 1

Table

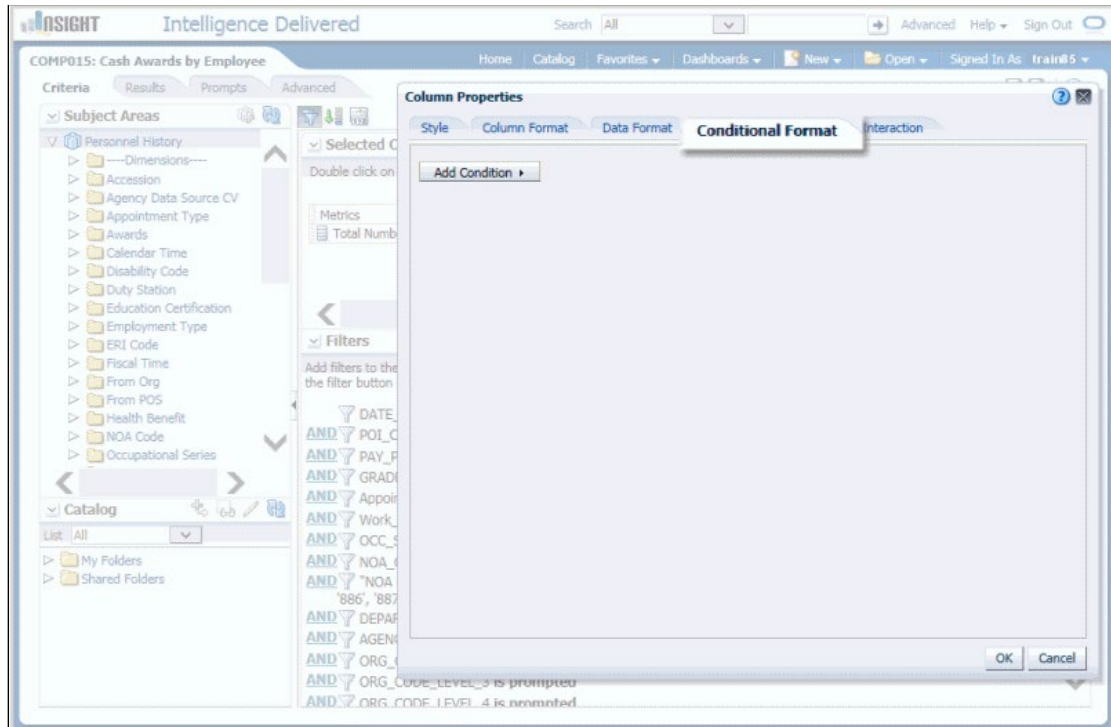
EMPLOYMENT_TYPE_CODE_DESCR	NAME_EMPLOYEE_LAST	NAME_EMPLOYEE_FIRST	NAME_EMPLOYEE_MIDDLE	ALTERNATE_WORK_SCHEDULE_DESCR	Employee Count	DEPARTMENT_CODE	AGENCY_CODE
Full-Time	CASH	JOHNNY	R	Four 10 Hour Days Per Week	1	AG	90
Full-Time	CURLY	LARRY		Four 10 Hour Days Per Week	1	AG	90
Full-Time	DIE	JANE	SALLY	Four 10 Hour Days Per Week	1	AG	90
Full-Time	FOUNTAIN	PETE		Four 10 Hour Days Per Week	1	AG	90
Full-Time	SAVE	MARVIN		Four 10 Hour Days Per Week	1	AG	90
Full-Time	JASGER	NICK	M	Four 10 Hour Days Per Week	1	AG	90
Full-Time	REDFORD	ROBERT		Four 10 Hour Days Per Week	1	AG	90

Figure 189: Ad Hoc Report With Imported Formatting

## Using Conditional Formatting

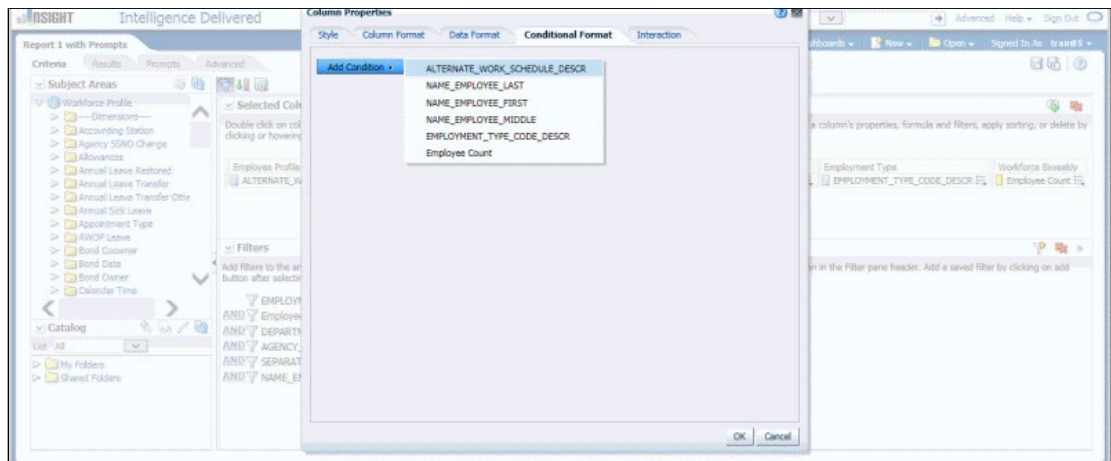
### To Use Conditional Formatting:

1. Select the **Criteria** tab. The Criteria tab is displayed.
2. Navigate to the **Selected Columns** pane within the **Criteria** tab of the ad hoc report editing page.
3. Select **Edit** icon for the desired data element and select **Column Properties** from the drop-down menu.
4. Navigate to the **Conditional Format** tab.



**Figure 190: Conditional Format Tab Within the Column Properties Window**

5. Select **Add Condition** to apply conditional formatting to the targeted data element. The Add Condition options are displayed



**Figure 191: Add Condition in the Conditional Format Tab**

6. View the New Condition page to customize the conditions and values to highlight.

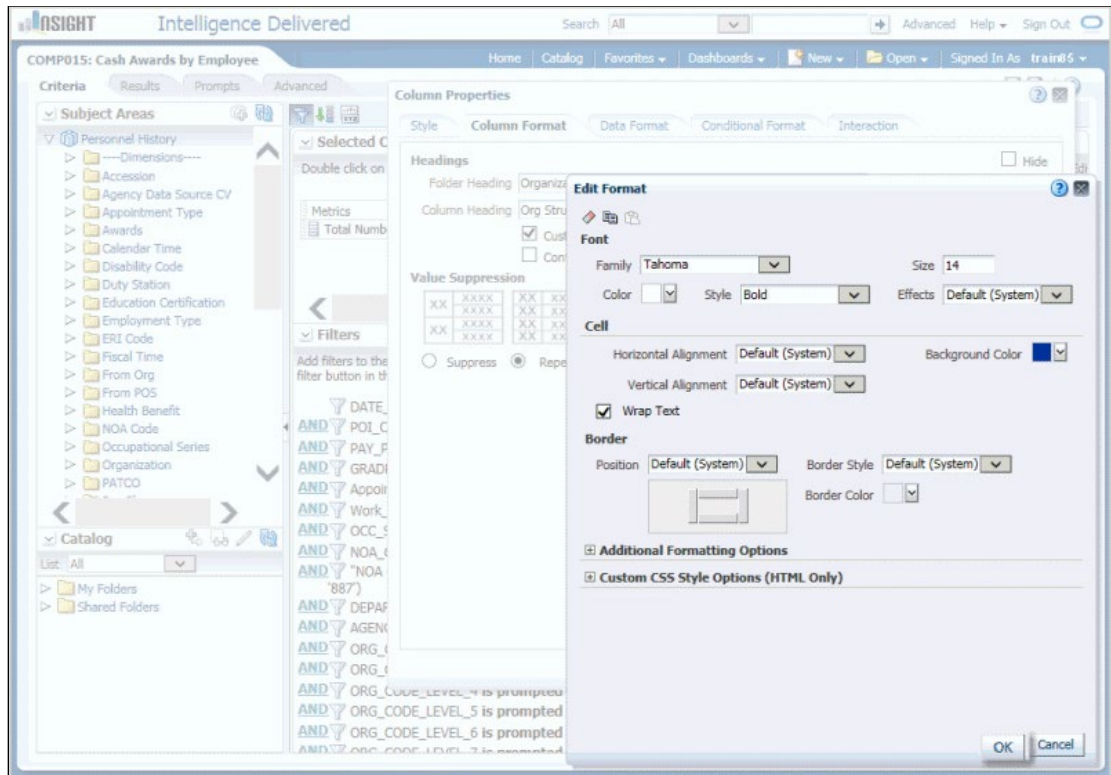


Figure 192: Edit Format popup

7. Select **OK** to close the Edit Format popup. The New Condition popup appears.

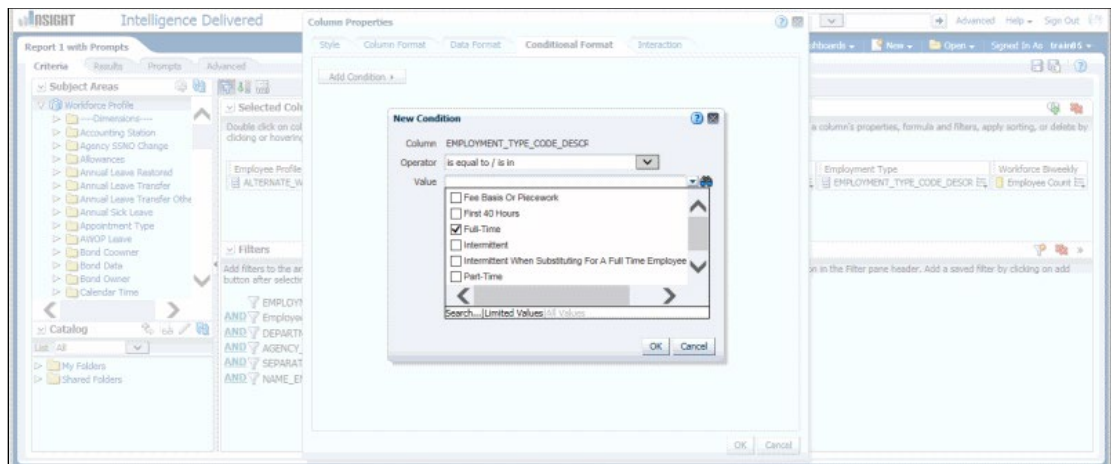
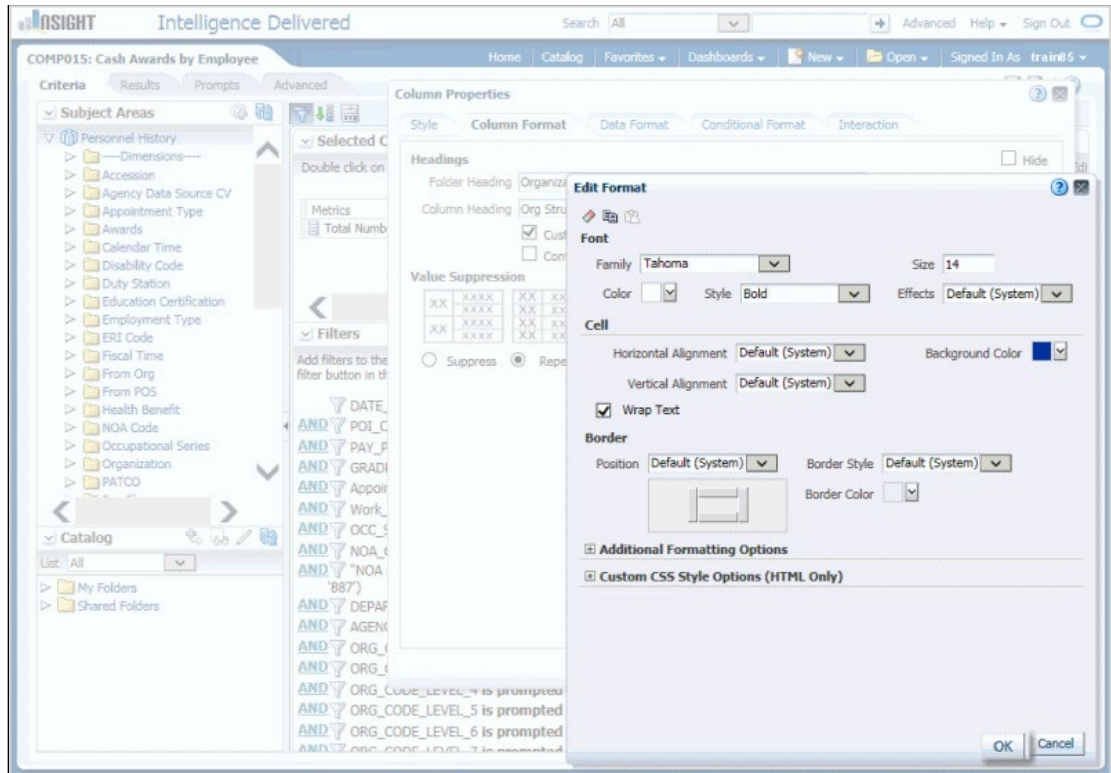


Figure 193: New Condition Window

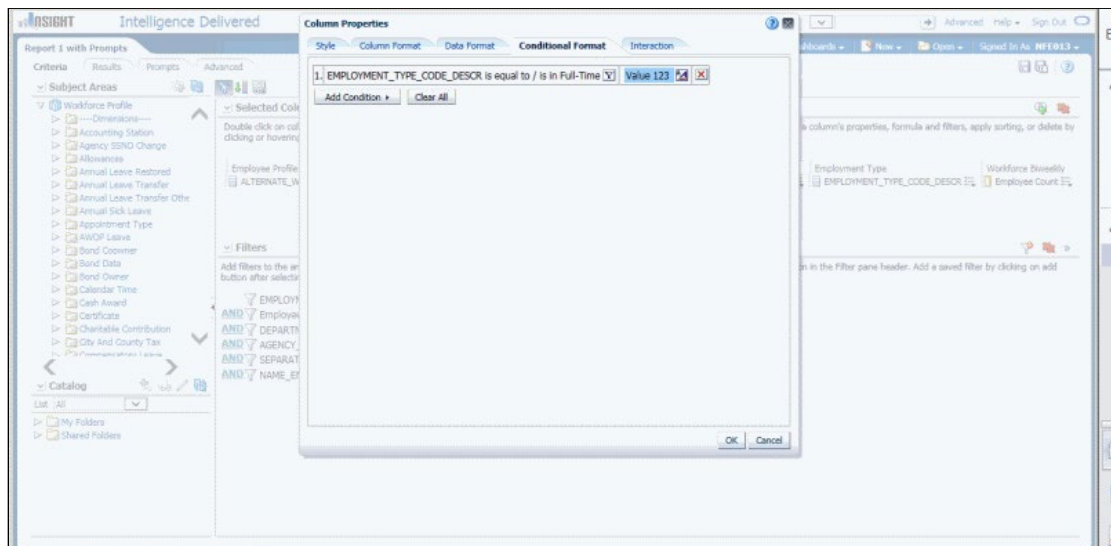
8. View the New Condition popup to select the styles and formatting of how the condition will be shown in the report.





**Figure 194: Edit Format popup**

9. Select **OK** to accept the changes. The Column Properties popup appears.
10. View the new conditions in the Column Properties popup.



**Figure 195: Column Properties popup**

11. Select **OK** to close the Column Properties popup.
12. Navigate to the Results to run the report with the new conditions.



13. Select **Save As** icon.

14. Save the report.

Figure 196: Final Report With New Conditions

## Calculating in Insight

Calculations in Insight allow users to manipulate data using formulas, functions, bins, and calculated items.

### Formulas and Functions

Review how Insight enables users to customize data elements in a report by using mathematical logic through the edit column formula feature. This feature is valuable for report customization in three main situations:

<b>Calculations</b>	Apply mathematical functions to customize data elements for Agency-specific needs (e.g., average, running sum). Use date functions to time stamp differences from today's date to the date of the personnel action effective date.
<b>Formatting</b>	Combine or concatenate multiple data elements into a new column (e.g., John + Smith = John Smith). Enable other custom formatting options with substrings and casting (e.g., displays SSN as 123-45-6789 rather than 123456789).
<b>Conditions/Conversions</b>	Display a particular value based on a scenario (e.g., an Award Amount column which displays dollar values for cash awards and hours for time off awards).





## Formulas and Functions

Using the edit column formula feature of Insight, users can manipulate data in a report by employing mathematical operations to create new scenarios.

To create a formula, users can select the **Edit Formula** option from the **Edit** icon drop-down menu.

In the Edit Column Formula popup, users can apply formulas to values in a column and customize the Column Heading field. There are several mathematical operations to manipulate data on the Edit Column Formula popup.

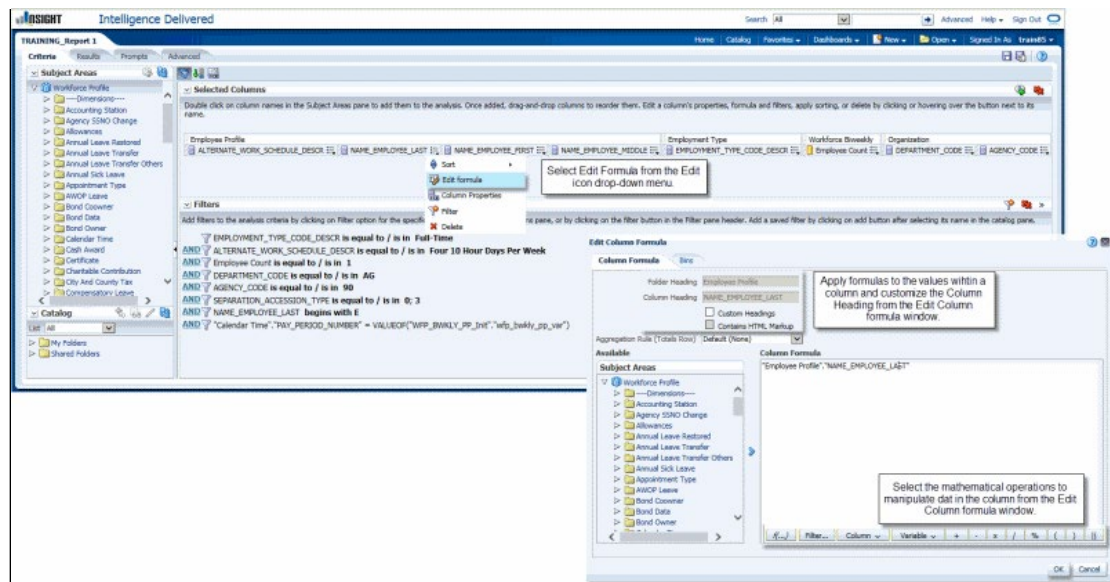


Figure 197: What Are Formulas

### Writing Advanced Formulas

Advanced Formulas in Insight enable the user to make more complex scenarios by combining multiple functions. There are several advanced formulas that can be created for unique calculations, such as:

- **Concatenated-String-Cast Advanced Formula:** Reveals only the last four digits of the Employee Unique ID and replaces the first five digits with XXXXX's.
- **Current Date-Personnel Action Effective Date Advanced Formula:** Calculates the number of days since an event, such as an NOACs effective date.
- **Sum-Case When Advanced Formula:** Calculates the sum of the number of Not to Exceed (NTE) actions that have already expired.

### Functions:

Functions are used to build complex scenarios that tailor results, analyze trends, and customize and isolate data. Functions available in Insight include:



- **Aggregate:** Completes simple mathematical functions, such as average or sum.
- **Running Aggregate:** Completes simple mathematical aggregate functions with running and moving data.
- **String:** Edits or manipulates strings of data.
- **Math:** Completes complex mathematical functions.
- **Calendar/Date:** Performs functions related to year, month, day, or time.
- **Conversion:** Performs functions such as Cast, If Null, and Value of.
- **System:** Variables related to Subject Area being used and user who is logged into Insight.
- **Expressions:** Performs functions such as Case (Switch) and Case (If).
- **DB Functions:** Performs database evaluations.
- **Time Series Calculations:** Calculates aggregated values from a specified point in time or over a period of time.

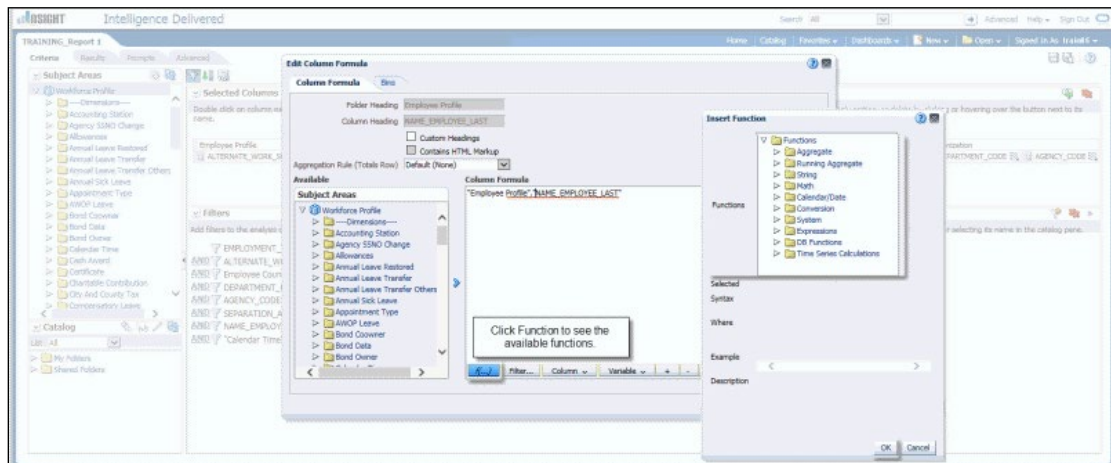


Figure 198: Insert Function Popup

Each function is listed in the Insert Function popup, including the description of the function and how it is applied.

- **Syntax:** Displays the shell of the formula.
- **Where:** Describes the terms included in the formula, which can either be a number or an expression.
- **Example:** Provides potential example for this type of function.
- **Description:** Defines the function.

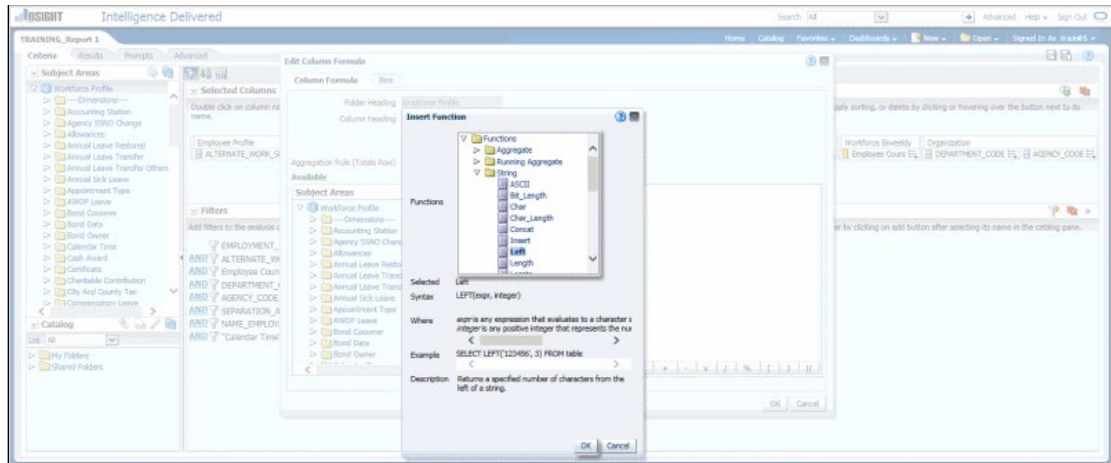


Figure 199: Defining Functions Popup

## Using the Case (If) Function

To Use the Case (If) Function:

1. Select the **Edit** icon for the targeted data element from the Selected Columns pane of the Criteria tab. The Criteria tab is displayed with the applicable options.

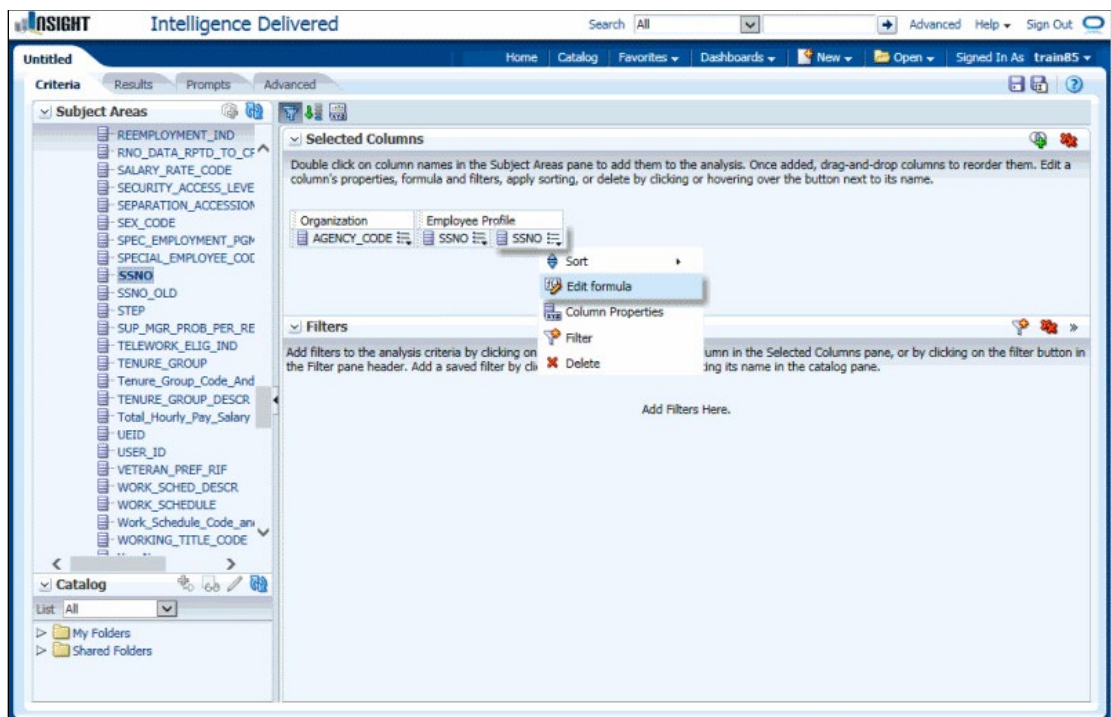
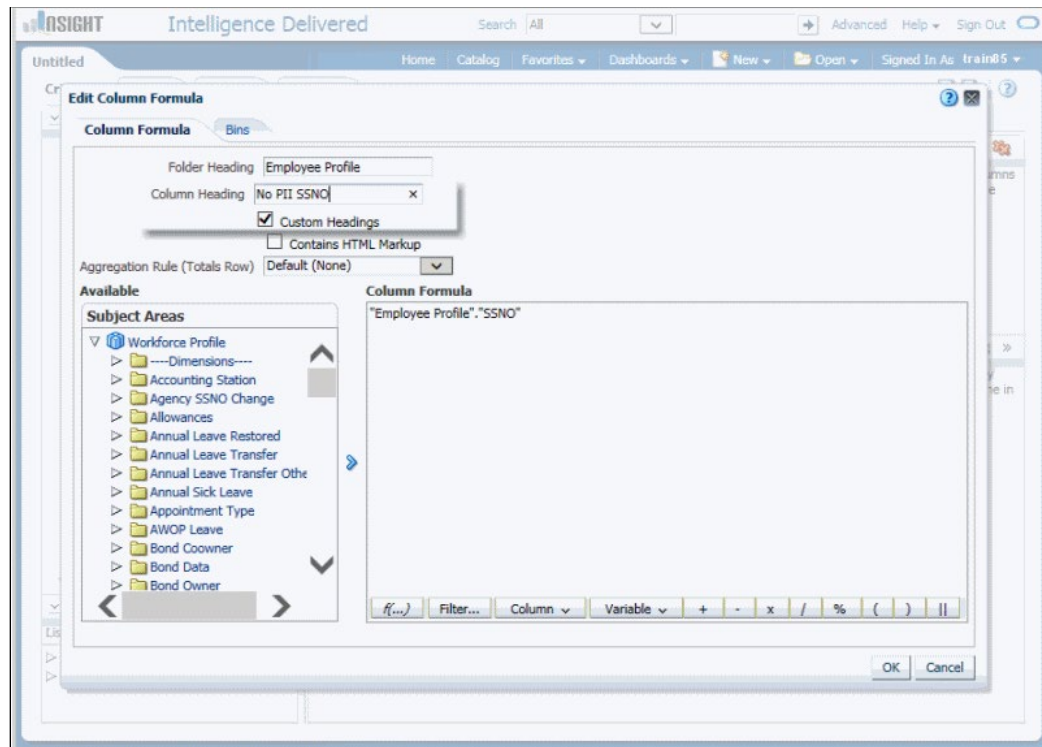


Figure 200: Edit Formula Popup

2. Select **Edit Formula**.
3. Select the **Custom Headings** checkbox under Column Heading in the Column Formula tab.



4. Customize the new column heading with a title that indicates the result of this Case (If) statement on the Edit Column Formula popup.



**Figure 201: Edit Format Popup With Column Headings**

5. Place cursor at far left of formula.
6. Select the **Function** icon in the Column Formula workspace to open the Insert Function popup. The Insert Function popup appears.

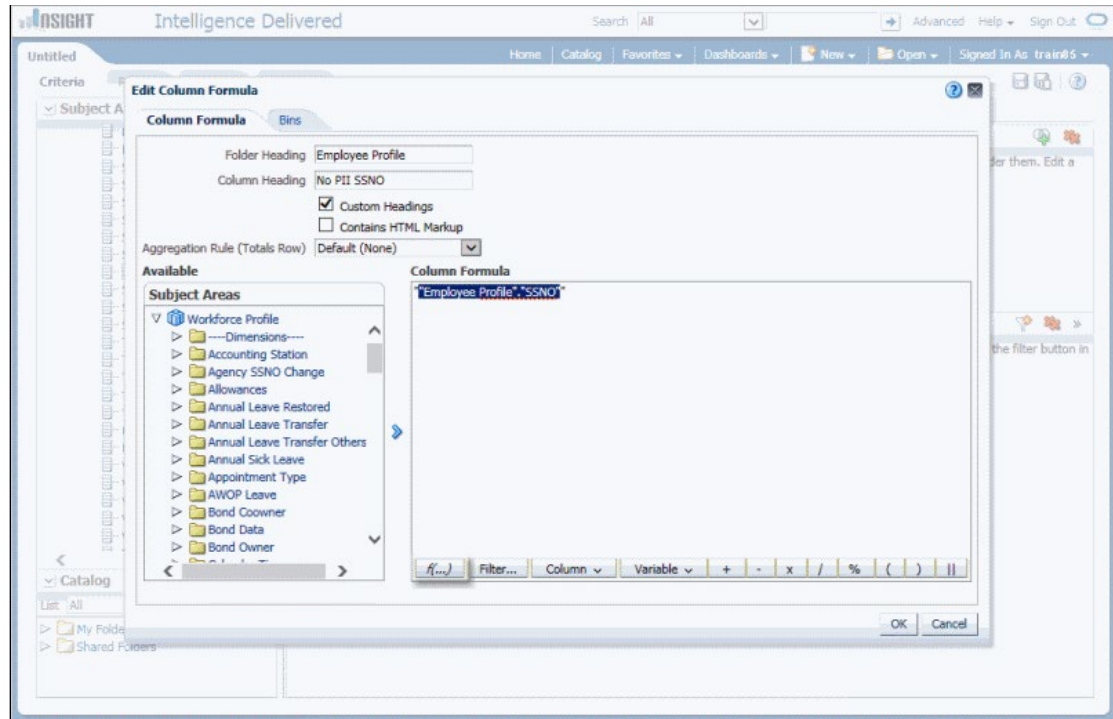


Figure 202: Function Icon With Column Formula Workspace

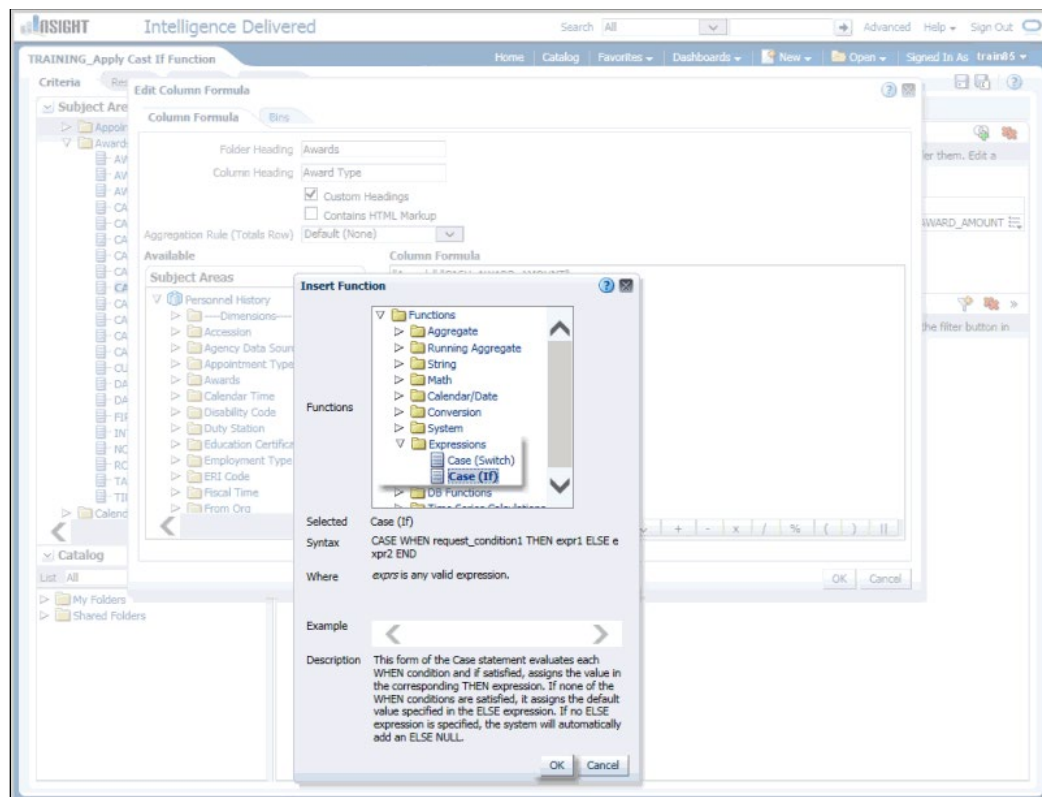
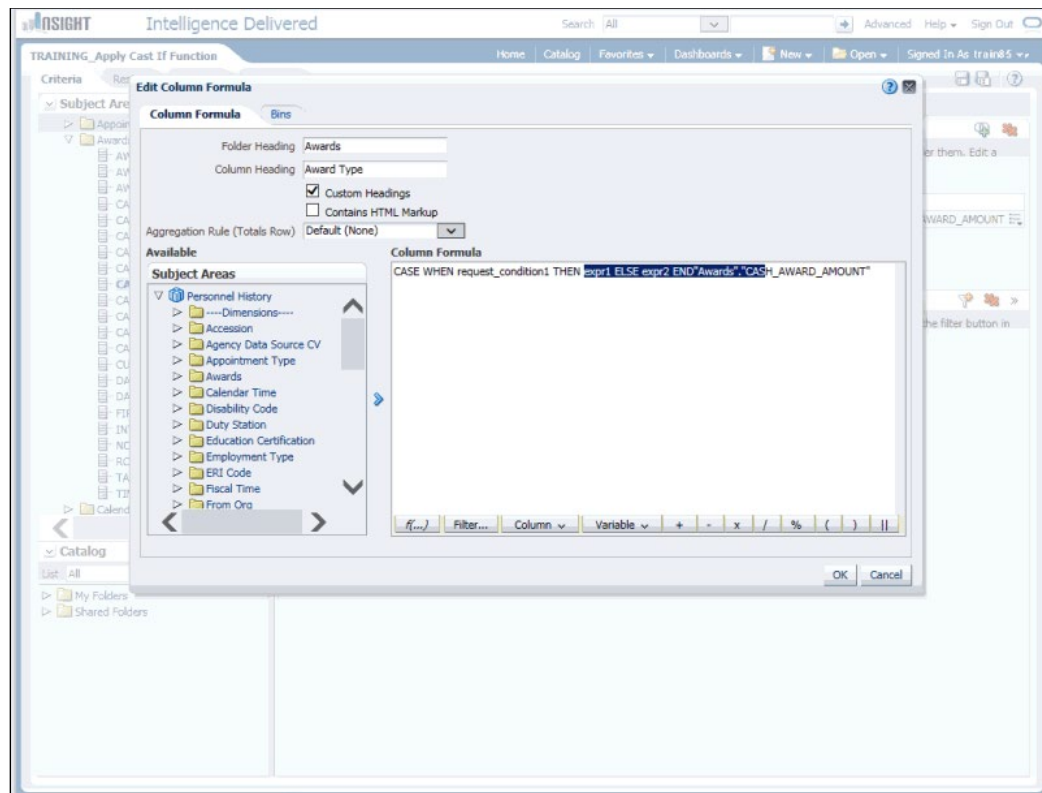


Figure 203: Insert Function Popup With Expressions





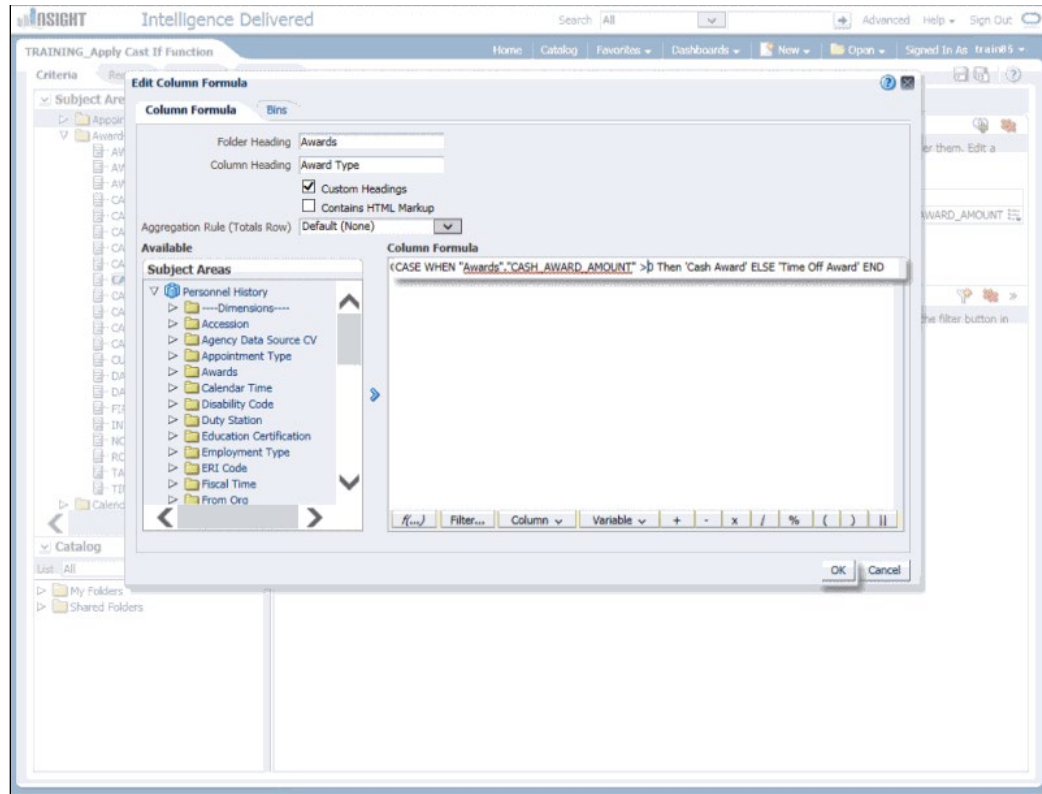
7. Select **Expressions** folder by double-clicking to expand the folder. The Expressions folder is expanded.
8. Select **Case (If)** by double-clicking or highlight **Case (If)**.
9. Select **OK** to apply the function to the data element. The information is displayed in the Column Formula box.



**Figure 204: Column Formula Box**

10. Replace the request condition 1 text with the targeted statement.
11. Replace the expr1 text with a targeted title using single quotation marks around the title.
12. Replace the expr2 text with a targeted title using single quotation marks around the title. An example is displayed below.





**Figure 205: Column Formula Workspace With New Formula**

13. Confirm the formula in the Column Formula workspace reads as desired.
14. Select OK to close the popup and save the information.

## Creating an Analysis

The example below describes the steps used to protect an individual's SSN by masking the first five digits. To do this, the user must use three functions:

Cast, Right, and Concatenate

- User must use the cast function to split the SSN into nine individual characters.
- User must use the right function to reveal only the four digits of the SSN.
- Use the concatenate function to combine a create text (XXX-XX) with the last four digits of the SSN. The following steps outline this process:
  - Create an Analysis
  - Use Cast Function
  - Use String Function



- Use Concatenate Function
- Add a Calendar Filter

### To Create an Analysis:

1. Select **New** action link from the top navigation bar.
2. Select **Analysis** from the menu of options.
3. Select the desired Subject Area for the ad hoc report.
4. Navigate to the Criteria tab and drag and drop data elements from the Subject Areas pane to the Selected Columns pane.

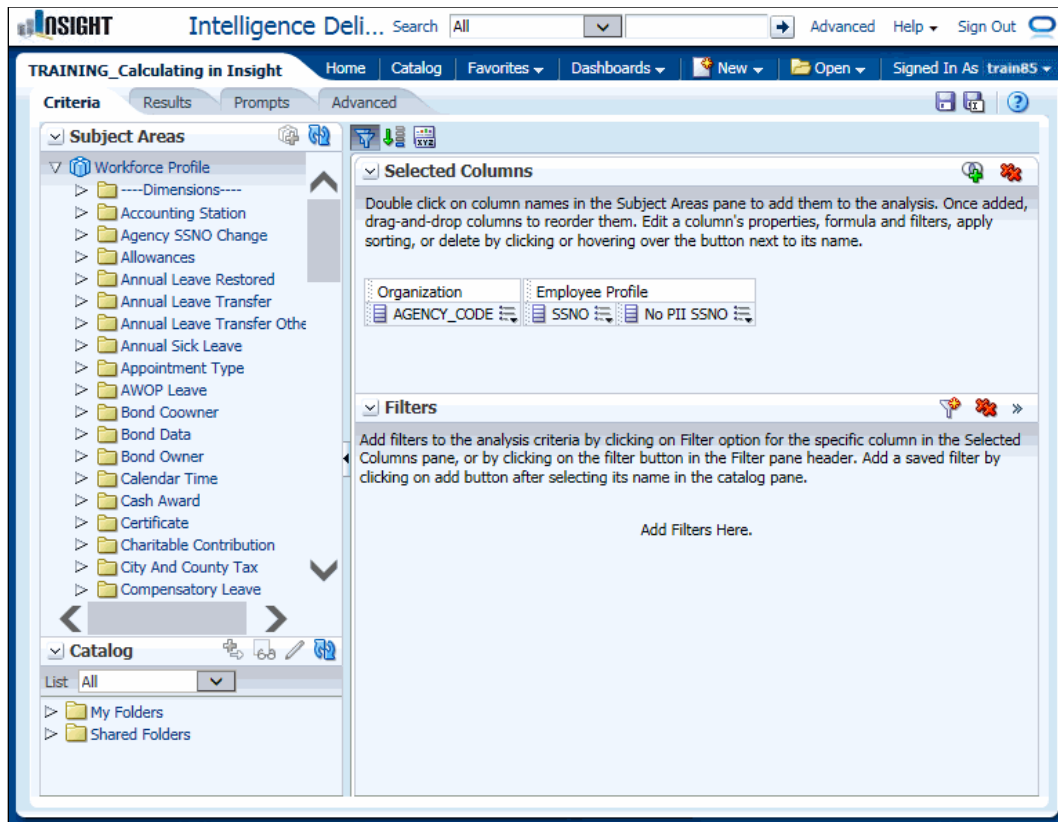


Figure 206: Selected Columns pane



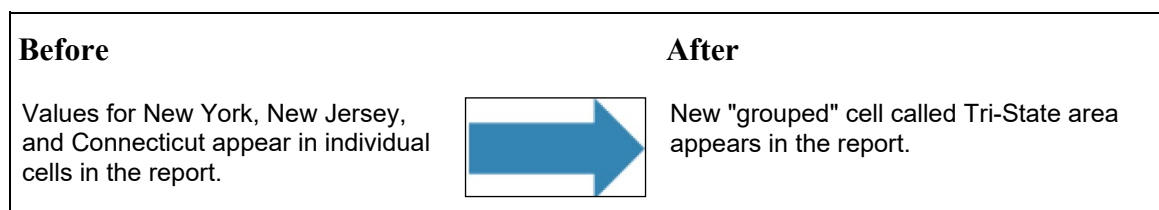
## Creating Calculated Items

This section explains how to create calculated items in order to group a defined value set within a report.

### Create a New Calculated Item

Users can customize the values within a data element by creating new defined groups of values - a new calculated item. The calculated item appears within a report (table, graph, etc.) in place of the original individual values and once created, the calculated item can be applied to multiple reports within that Subject Area.

For example, an organization has a high concentration of employees in New York, New Jersey, and Connecticut and refers to this as the "Tri-State Area".



## Combining Values as a New Calculated Item

### To Combine Values as a New Calculated Item:

1. Select **New Calculated Item** icon from the Results tab of the ad hoc report editing page. The applicable page is displayed.

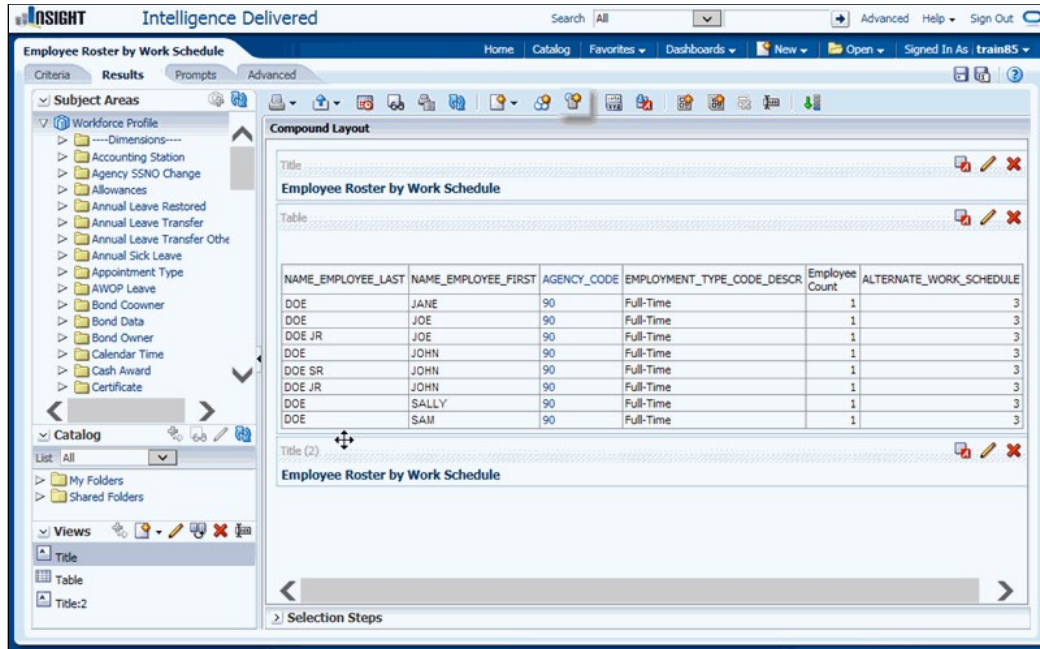


Figure 207: New Calculated Item Icon on the Report Navigation Bar

Icon Name	Definition	Icon
New Calculated Item	Groups values of a data element into a defined set.	

2. View the New Calculated Item page to create a defined group of values based on a menu of data elements included in the report. Valid values are:

Data Elements	Description
Display Label	Allows users to customize the name for the grouped value.
Values From	Lists the available data elements the user can choose from for the calculated item.
Function	Provides a list of mathematical operations (e.g., sum, min, max, average, first, last, count, count distinct) available for the calculation.
Available	Lists the values within the data element.
Format	Allows the user to customize the styles/format of the calculated item to distinguish it from other values (e.g., font, color, cell background, border color).

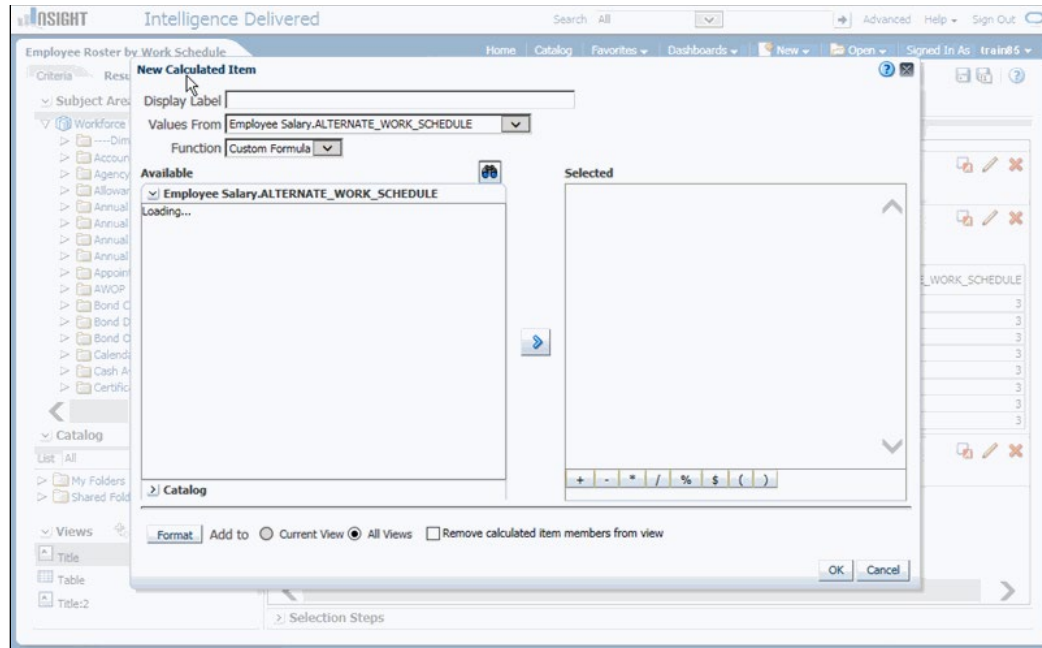


Figure 208: New Calculated Item Window

3. Assign a name for the grouped values in the Display Label text box.
4. Use the Values From drop-down menu to select the data element targeted for the calculated item.

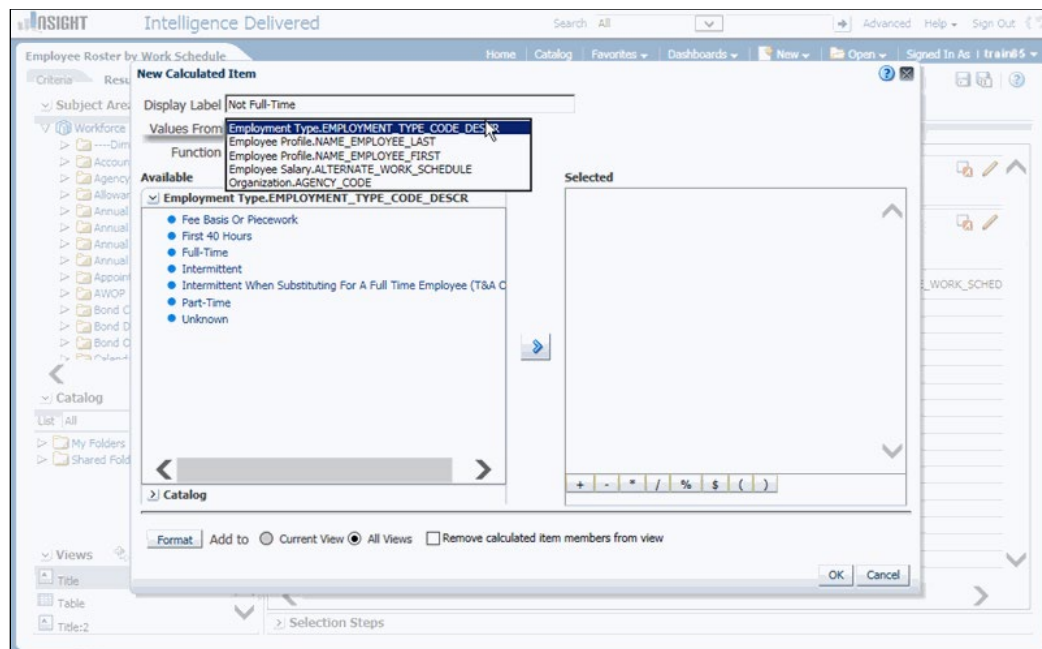


Figure 209: Values From Drop-Down Menu Options



Note: Users cannot create new calculated items with measure data elements.

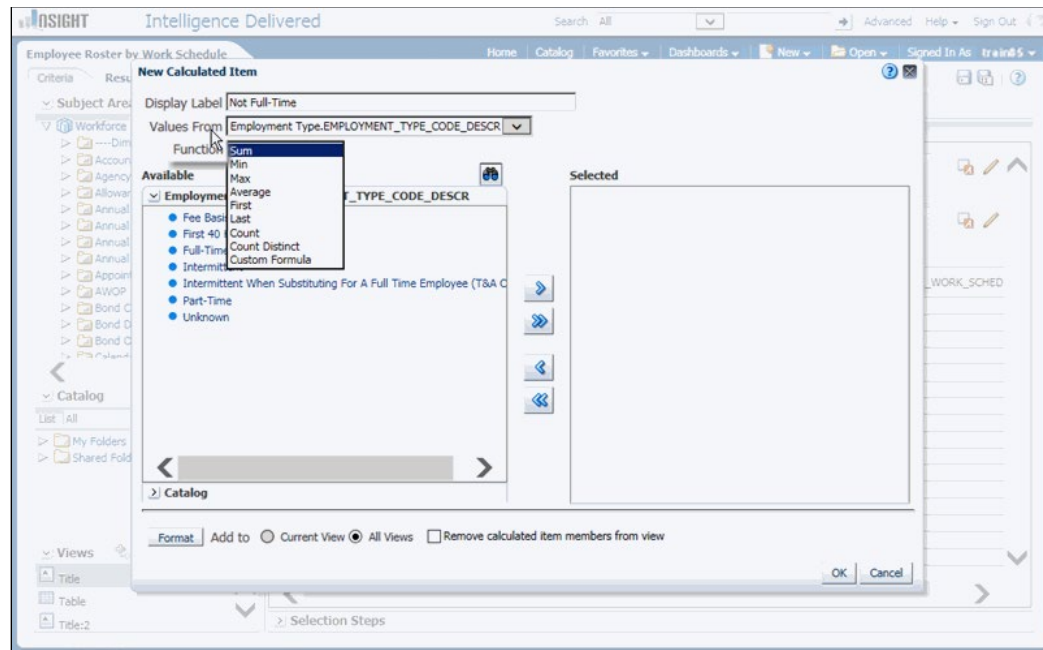


Figure 210: Function Drop-Down Menu Options

5. Select **Sum** from the Function drop-down menu.
6. Use the arrow to move the targeted values from Available to Selected.

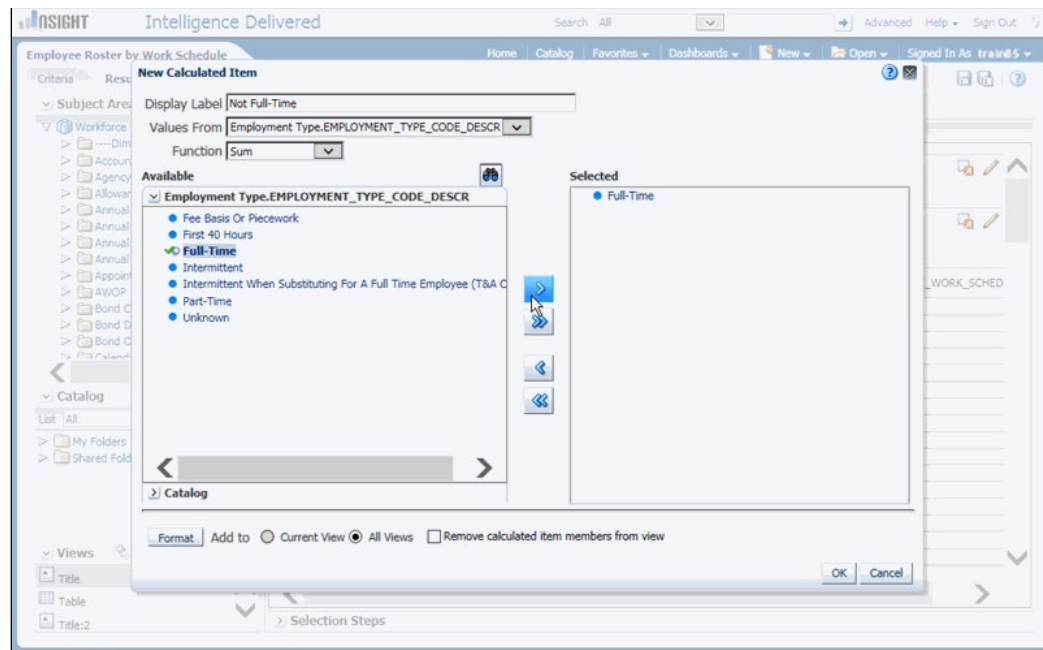


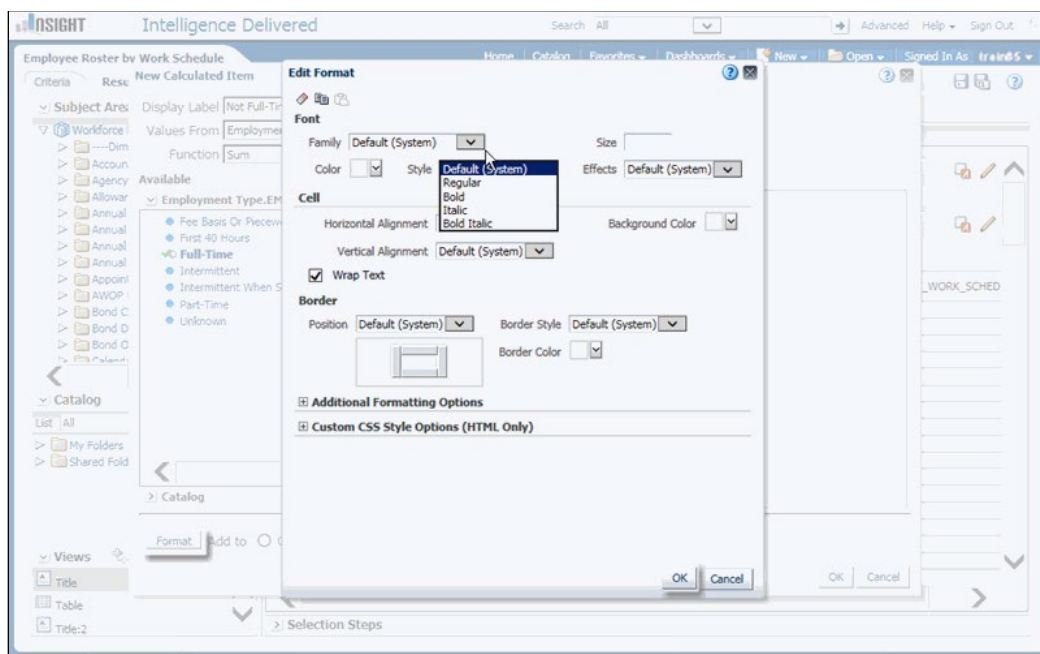
Figure 211: Move and Remove Arrow Icon Options





Icon Name	Description	Icon
<b>Move</b>	Moves the selected values in the Available pane to the Selected pane.	
<b>Move All</b>	Moves all values in the Available pane to the Selected pane.	
<b>Remove</b>	Remove the selected values in the Selected pane to the Available pane.	
<b>Remove All</b>	Remove all values in the Selected pane to the Available pane.	

7. Select **Format** icon located under the Catalog pane to view the Edit Format page and customize the styles and format of the calculated item to distinguish it from other values (e.g., font, color, cell background, border color).



**Figure 212: Format Window**

8. Select **OK** to close the popup.

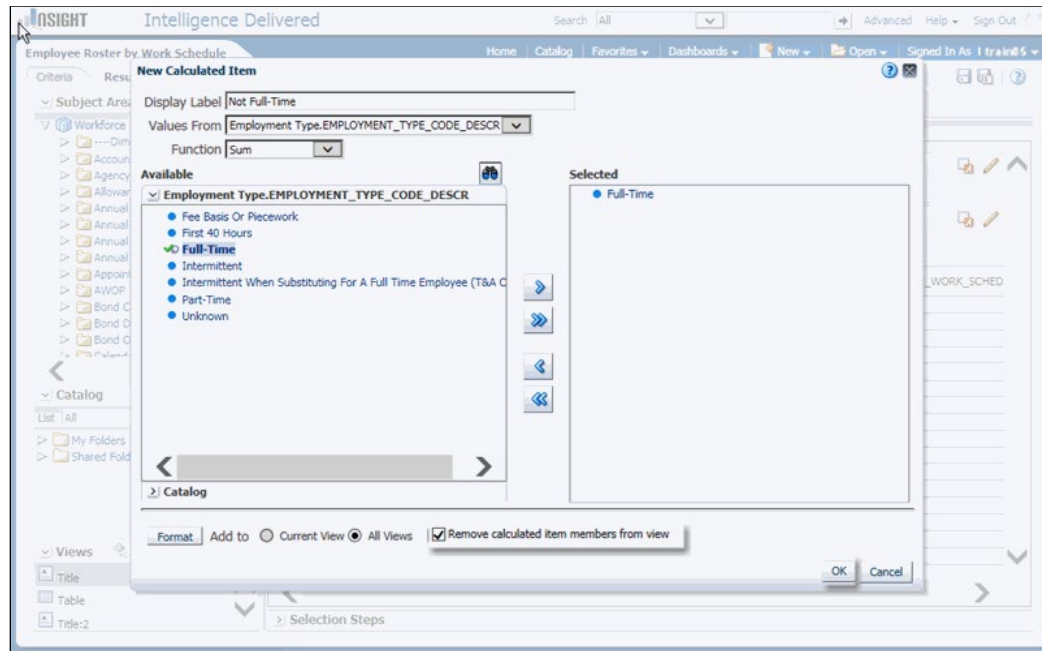


Figure 213: Remove Calculated Item Members From View Check box

9. Select the **Remove calculated item members from view** checkbox to prevent the individual values grouped together in the new calculated item from appearing within the report.
10. Select **OK**.

### ***Editing and Saving a Calculated Item***

Calculated items may be edited and/or saved in Insight.

#### **To Edit/Save a Calculated Item:**

1. Select the **Results** tab on the applicable report.
2. Expand the **Selection Steps** pane within the Result tab.

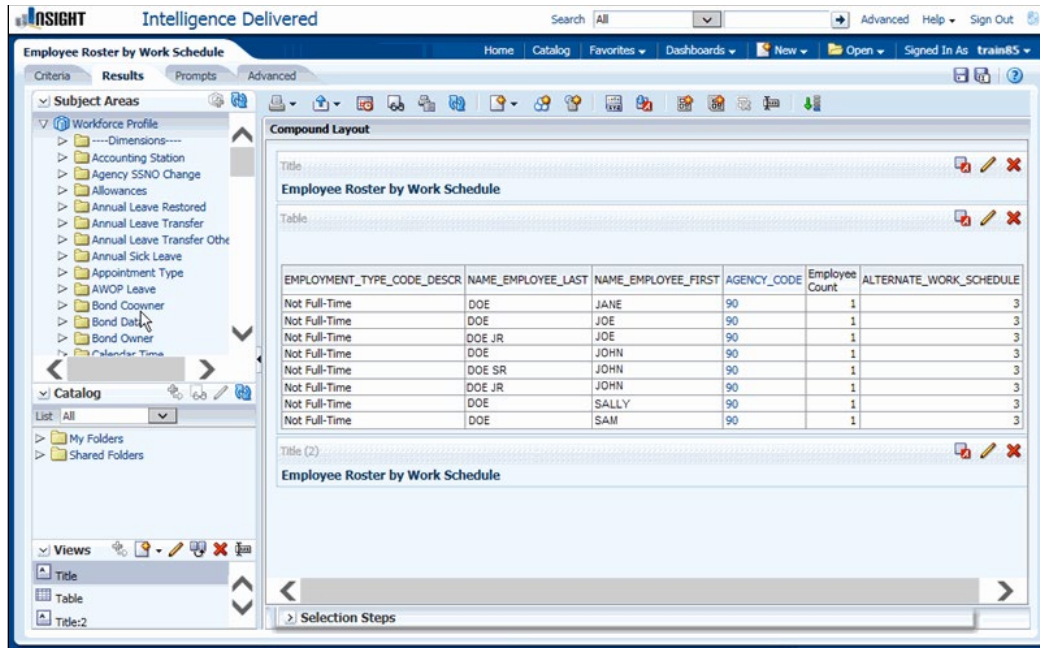


Figure 214: Selection Steps Pane in the Result Tab

3. Locate the data element used to create the calculated item from the **Selection Steps** pane.
4. Select the action link displaying the name of the calculated item. A drop-down menu appears allowing the user to choose whether to edit the calculated item or save the calculated item to the Catalog.

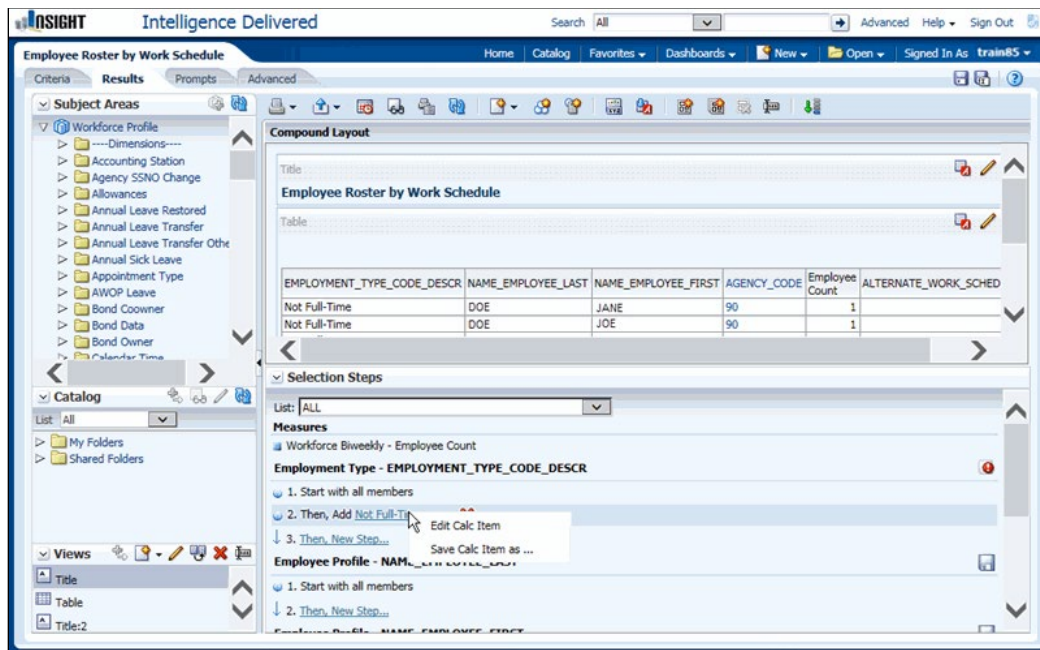


Figure 215: Data Element Drop-Down Menu in the Selection Steps

5. Select **Save Calc Item as**. The Save As popup appears.

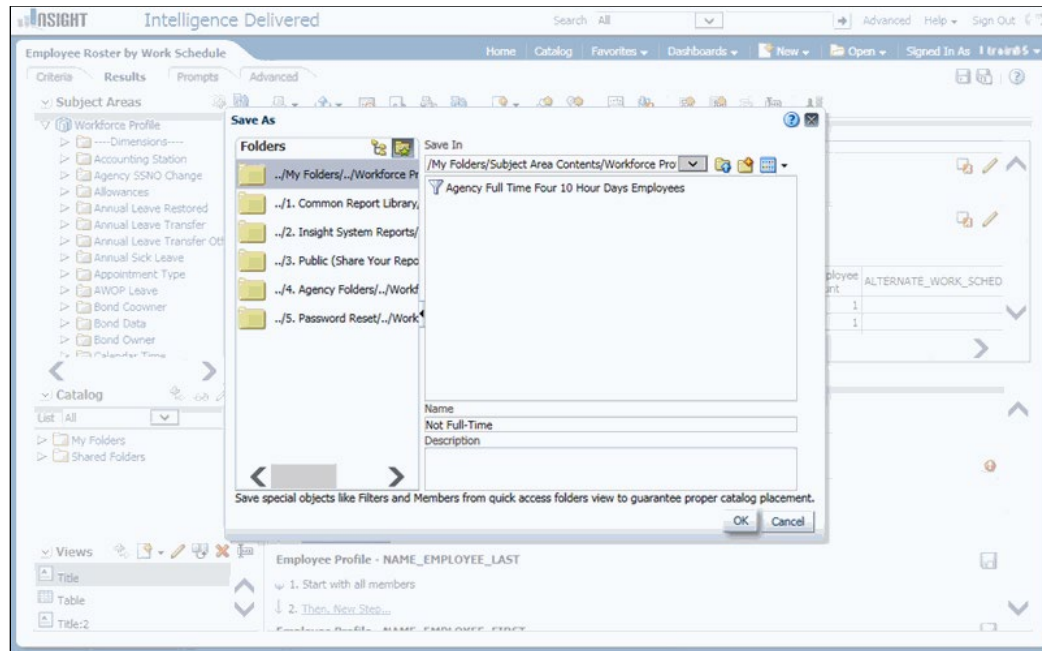


Figure 216: Save As Window With Calculated Item

6. Save the calculated item the Subject Area Contents folder in My Folders (default).

---

Note: Insight will automatically recommend that the user saves the new calculated item to a folder with the title of the Subject Area from which the item was created (e.g., WFP). Users should comply with this recommended location in order to use the calculated item in future reports.

---

## Using a Saved Calculated Item in a Report

### To Use a Save Calculated Item in a Report:

1. Navigate to the **Catalog** pane within the Results tab of the ad hoc report **editing** pane.



ALTERNATE_WORK_SCHEDULE_DESCR	NAME_EMPLOYEE_LAST	NAME_EMPLOYEE_FIRS
Four 10 Hour Days Per Week	Moe	Curley
	May	Sally
	Curley	Larry
	Doe	Jim
	Moe	Larry
	Jay	John
	Doe	Richard
	Rich	Richie
	Doe	Jane
	Doe	Jimmy
	Moe	Sally
	Doe	Jamie
	Tiny	Tim
	Mouse	Minnie
	Dog	Pluto
	Duck	Donald

Figure 217: Results Tab with Catalog Pane

Note: Saved calculated items can only be added to reports that contain the data element whose values were grouped using the calculated item. The Subject Areas of the calculated item(s) must correspond to the Subject Area used to create the report.

2. Double-click the saved calculated item.

ALTERNATE_WORK_SCHEDULE_DESCR	NAME_EMPLOYEE_LAST
Four 10 Hour Days Per Week	Moe
	May
	Curley
	Doe
	Moe
	Jay
	Doe
	Rich
	Doe
	Doe
	Moe
	Doe
	Tiny
	Mouse

Figure 218: Calculated Item within the Catalog Pane

The report will update with the grouped values of the calculated item.

3. Navigate to the **Selection Steps** pane to confirm the calculated item has been added to the report.

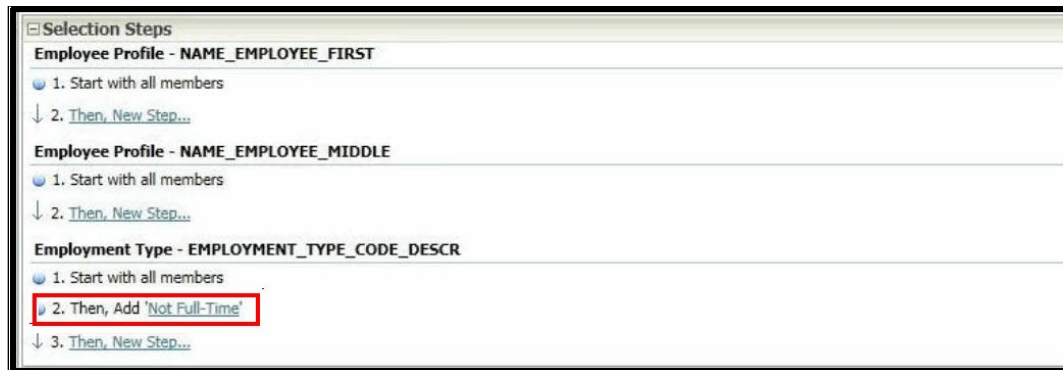


Figure 219: Selected Steps with Calculated Item

Note: Use the List drop-down menu within the Selection Steps pane to choose from a list of data elements included in the report.

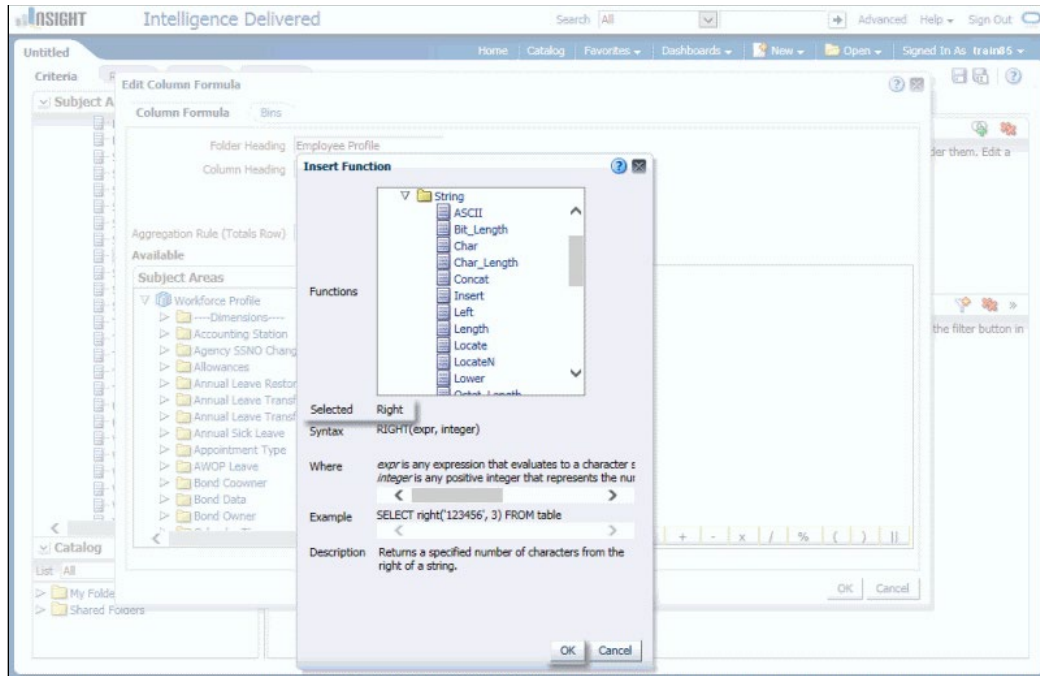
4. Select **Save As** icon to save changes to the report.

## Using String Function

### To Use the String Function:

1. Select the entire formula in the Column Formula workspace.
2. Select **Insert Function**.
3. Select **String** folder by double-clicking to expand the folder. The String folder is expanded.





**Figure 220: Insert Function Popup With String Folder**

4. Double-click the desired option to apply the function to the data element

**OR**

Double-click **Right** to apply the function to the data element.

5. Select **OK** to close the popup.



The **String** option will appear within the right side of the formula.

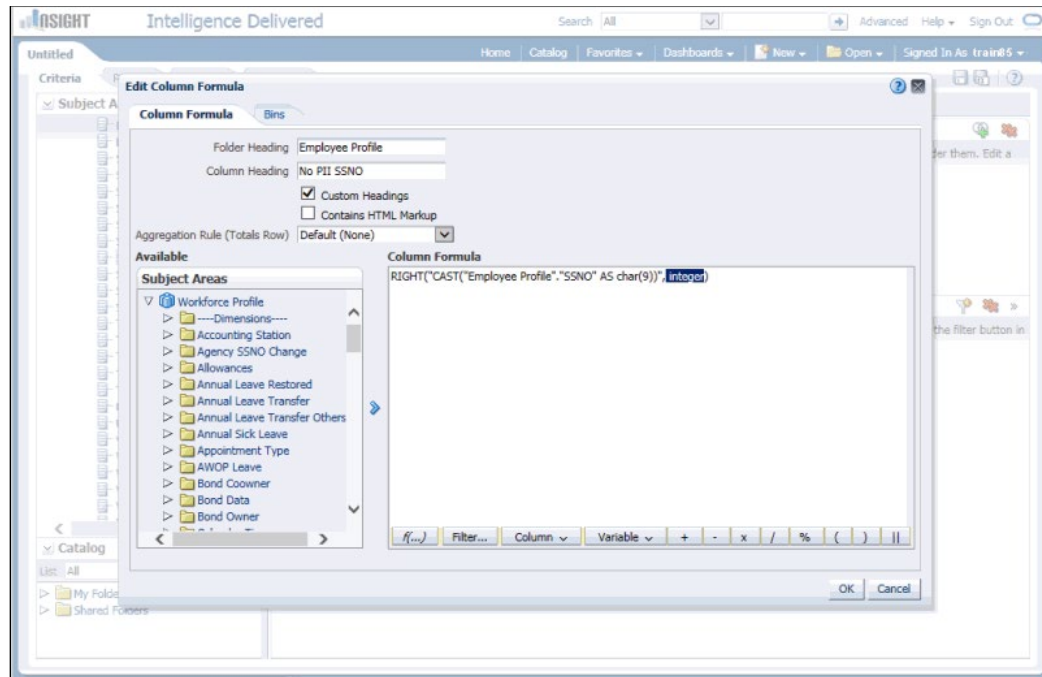


Figure 221: String Applied to the Column Formula Window

6. Replace the integer text with a number, (example: RIGHT(CAST(Data Element AS type), #)). An example is displayed below.

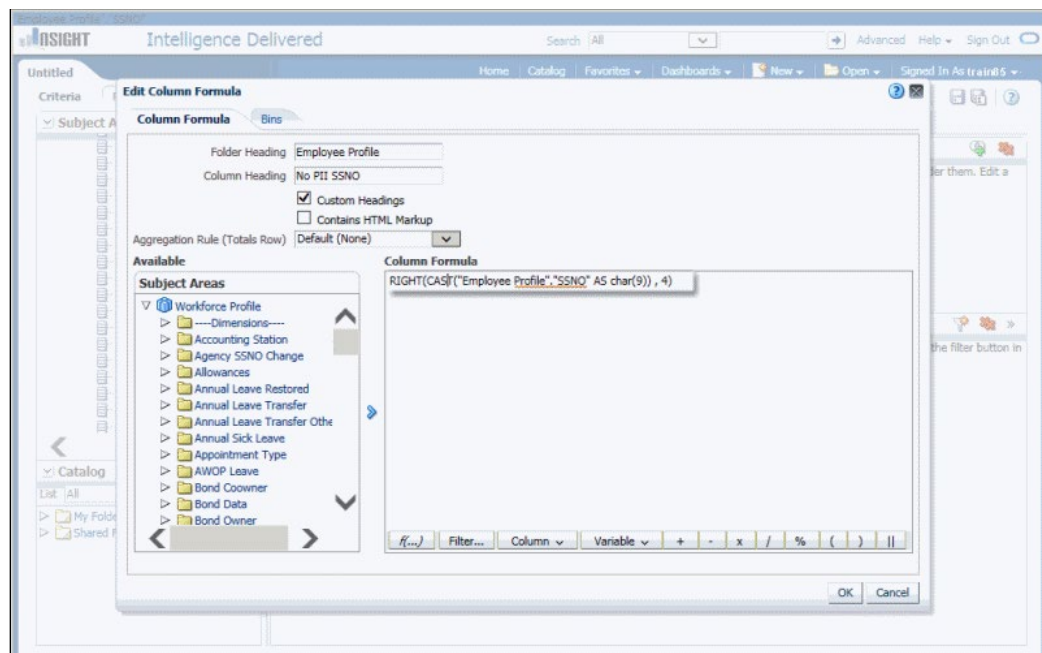


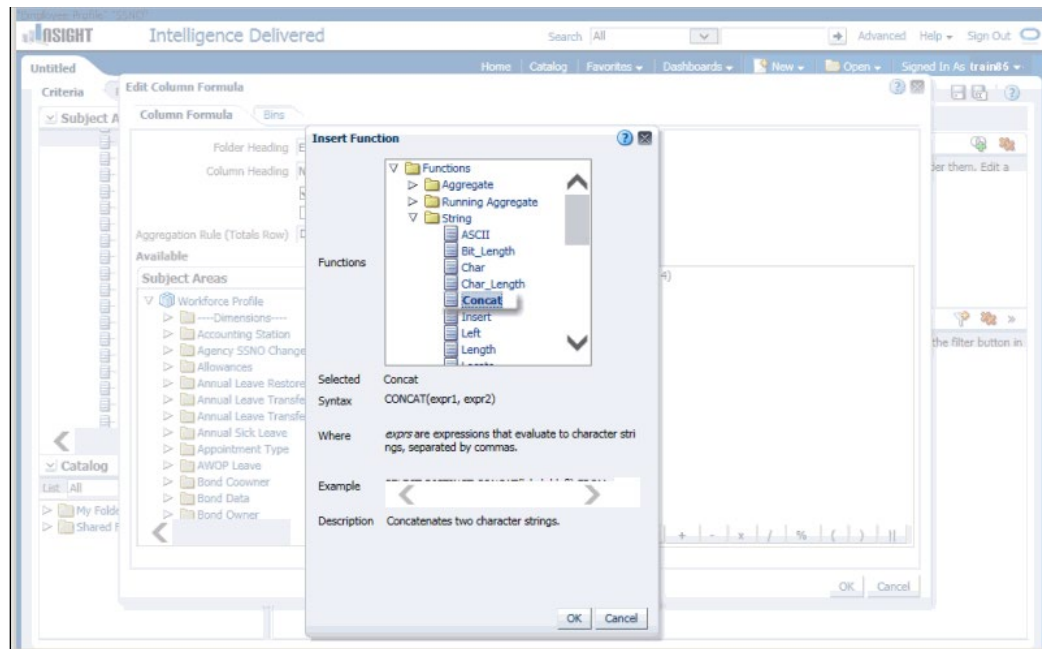
Figure 222: String Function Applied in the Column Formula Workspace



## Using the Concatenate Function

### To Use the Concatenate Function:

1. Place cursor at far left of formula and do not highlight the formula.
2. Select **Insert Function** in the Column Formula workspace to open the Insert Function popup. The Insert Function popup appears.



**Figure 223: Insert Function Popup**

---

**Note:** To insert words, use single quotation marks, such as 'Time Off' or 'XXX-XX-.'

---

3. Select **String** folder by double-clicking to expand the folder. The String folder is expanded.
4. Select **Concat** by double-clicking to apply the function to the data element.
5. Replace expr1 and expr2 with desired text using single quotation marks around the text, (example: CONCAT('desired text',RIGHT(CAST(Data Element AS type), #))). An example is displayed below.

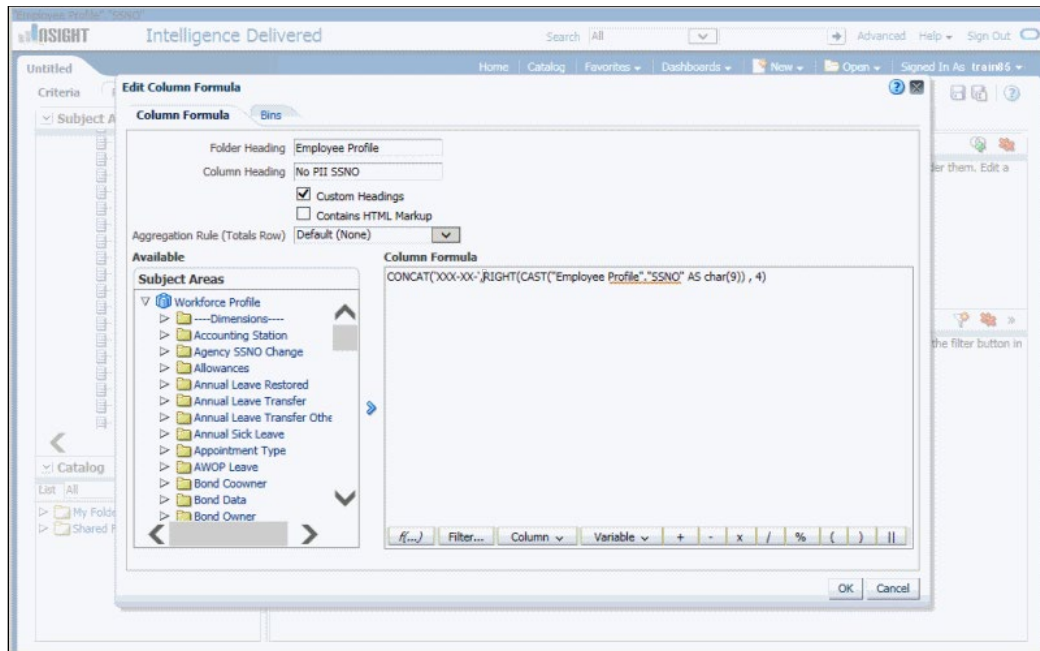


Figure 224: Concat Applied to the Column Formula

6. Select **OK**. The information is displayed in the Column Formula box.

**OR**

Alternatively, concatenate using the **Concatenate** icon: 'XXX-XX-' || RIGHT(CAST(DATA Element AS type), #). This option can be used by selecting the **Concatenate** icon below the Column Formula workspace.

7. Select the **Concatenate** icon below the Column Formula workspace.

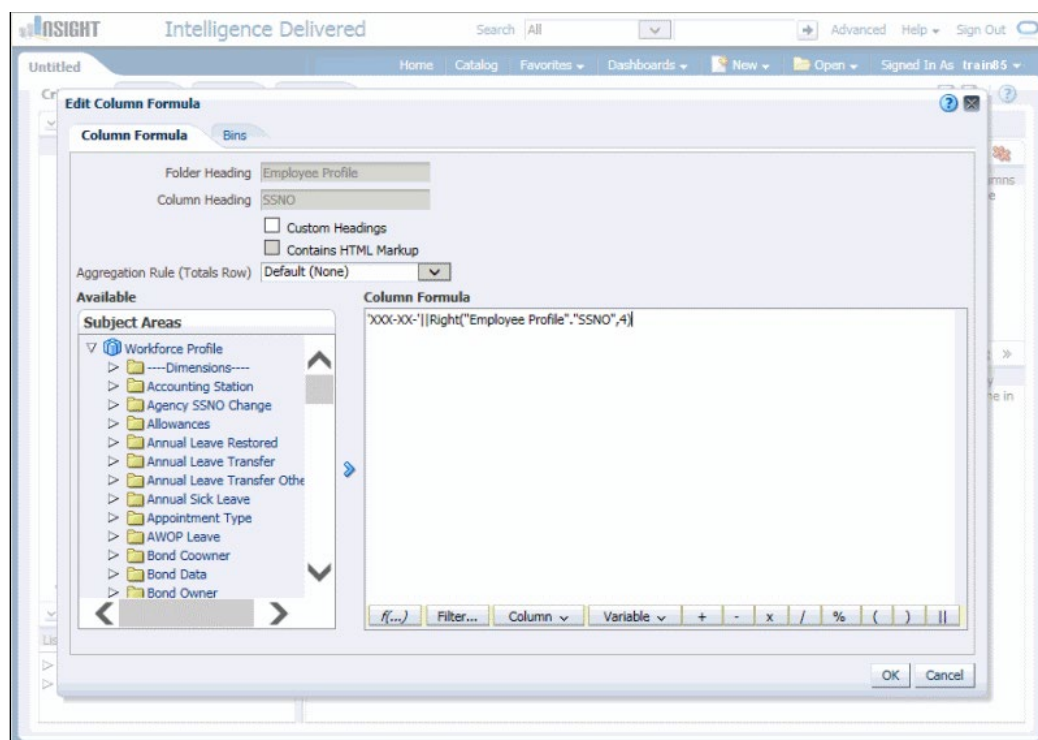



Figure 225: Column Formula Using Concatenate Icon

Icon Name	Definition	Icon
Concatenate	Joins multiple data elements so the values of each data element are merged in a single cell.	

8. Select **OK** to close the popup.

## Using the Concatenate Icon

### To Use the Concatenate Icon:

1. Select **Edit** icon for the targeted data element from the Selected Columns pane on the Criteria tab.
2. Select **Edit Formula** in the drop-down menu. The drop-down menu options are displayed below. The Edit Column Formula popup appears.

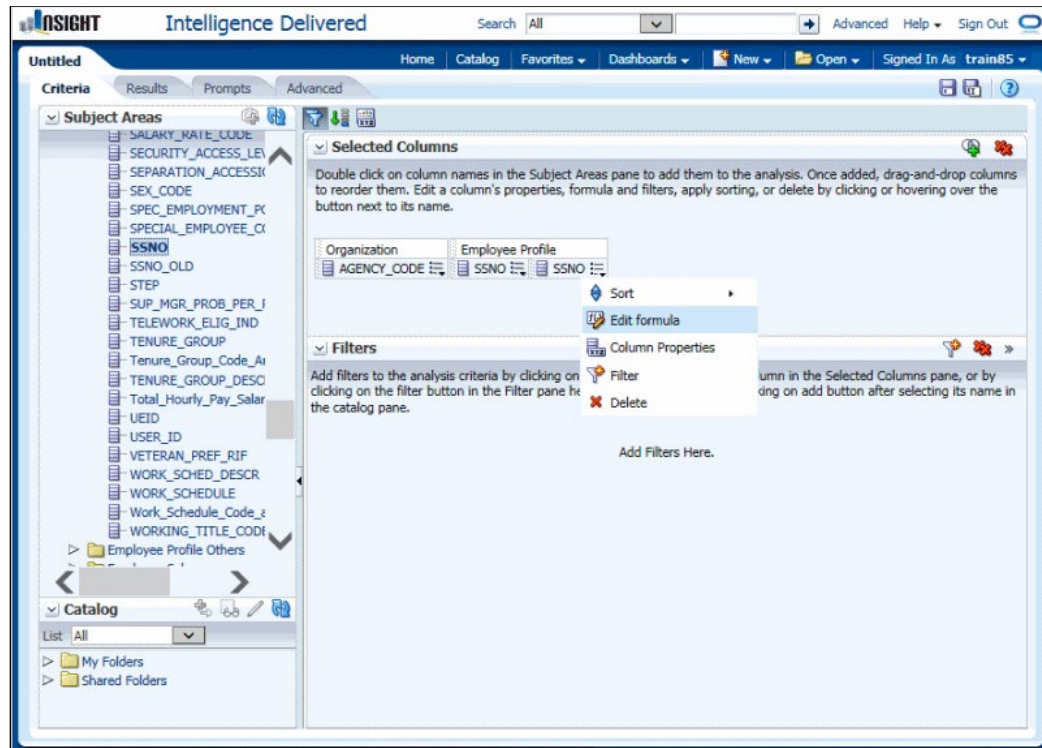


Figure 226: Edit Formula Popup

---

Note: Users can only concatenate text data elements, not numbers or dates.

---

3. Customize the **Column Heading** with a title that indicates the result of the concatenated data elements from the Edit Column Formula popup.



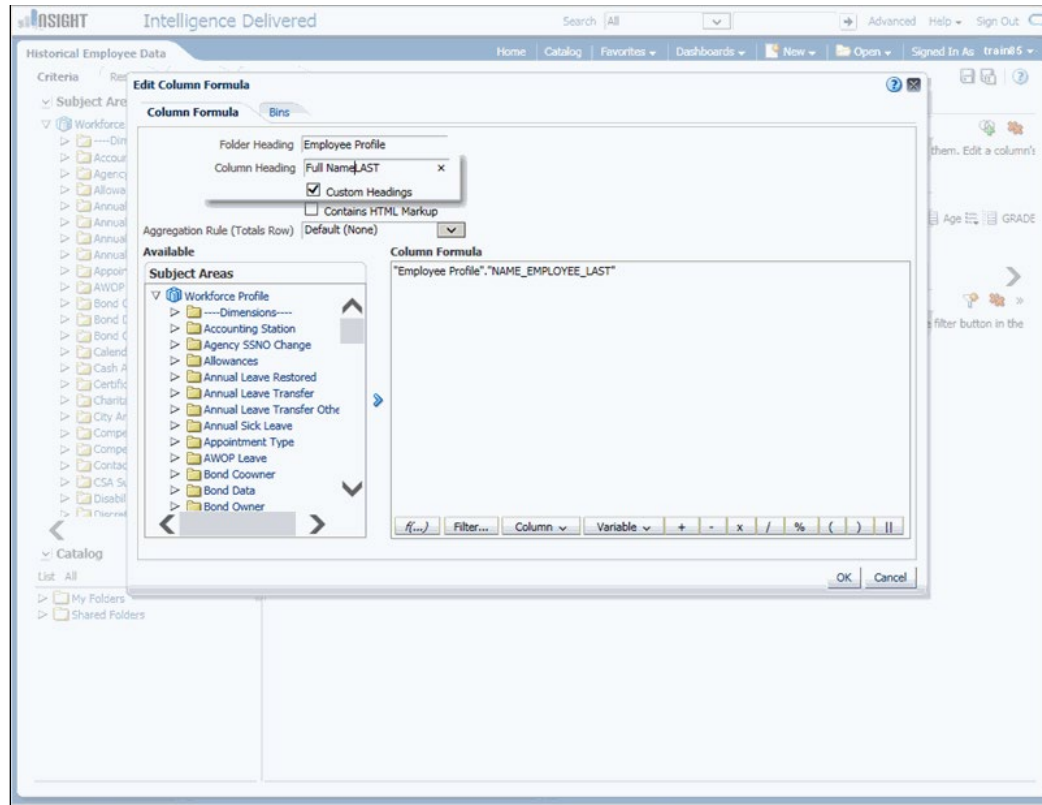


Figure 227: Edit Column Formula With Custom Headings

4. Select the **Concatenate** icon from the menu of mathematical operations below the Column Formula workspace.

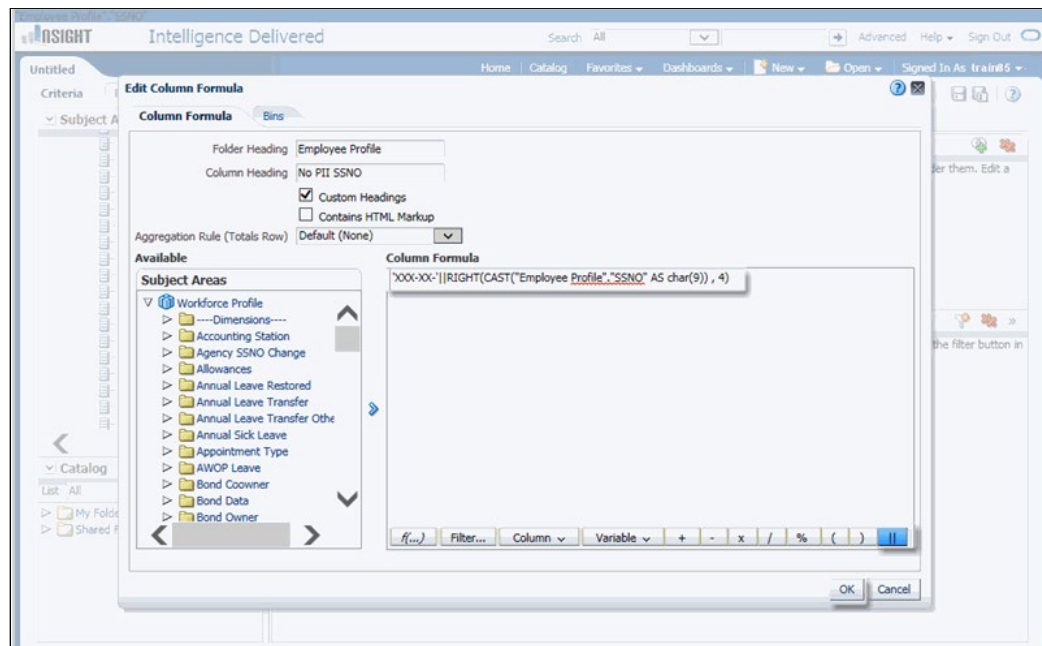


Figure 228: Concatenate Icon in the Column Formula Workspace



Icon Name	Definition	Icon
Concatenate	Joins multiple data elements so the values of each data element are merged in a single cell.	

5. Use the **Subject Areas** pane and **Column Formula** workspace to build the equation to mimic the following: Data Element 1Data Element 2. Below is an example of this.

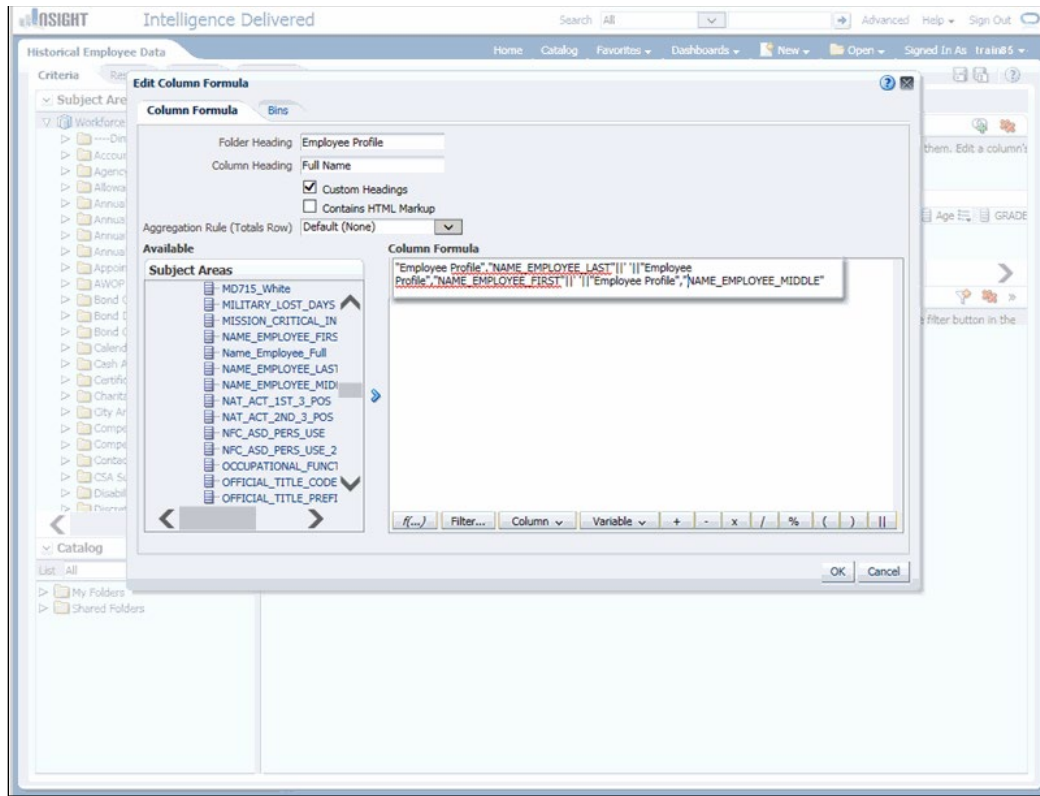





Figure 229: Column Formula Workspace With Concatenation Formula

Note: Users can replace the space after the Data Element () with a number of options including a dash () , comma () , etc.

6. Select **OK** to close the popup.
7. Select the **Edit** icon for the targeted data element.
8. Select **Delete** from the menu of options to delete the additional data element(s) concatenated while using the **Edit Column Formula** workspace.

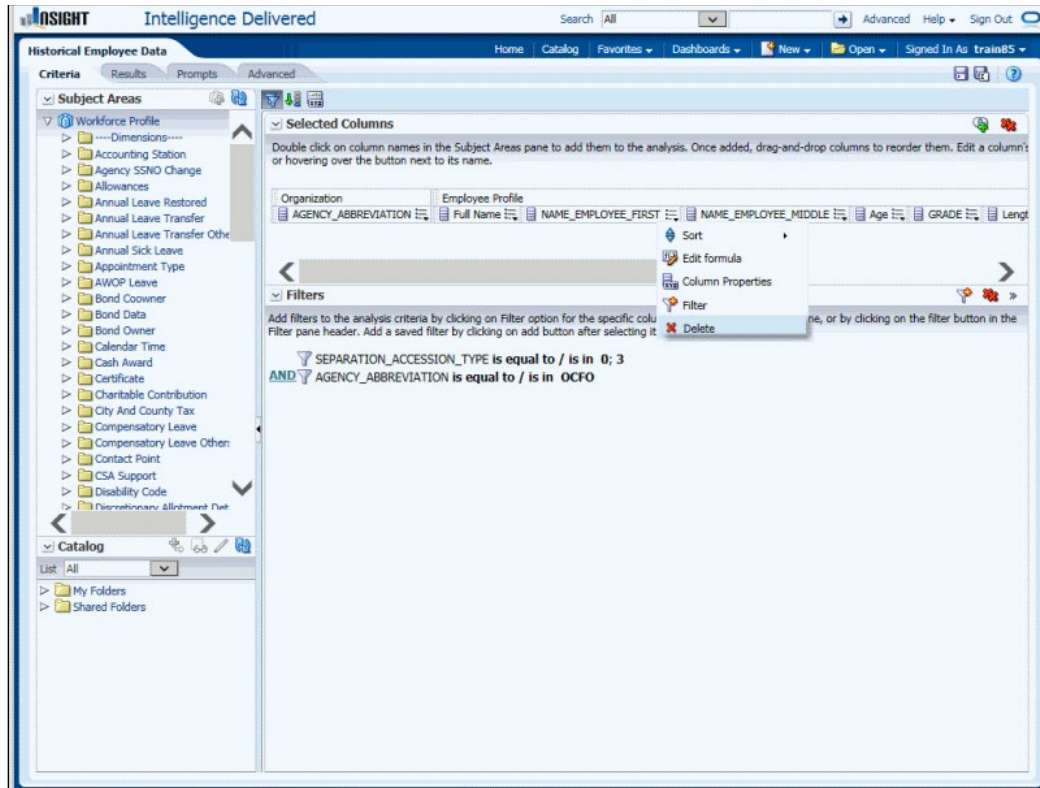


Figure 230: Data Element Edit Icon Drop-Down Menu With Delete

9. Select the **Results** tab to view the result of the concatenated items.

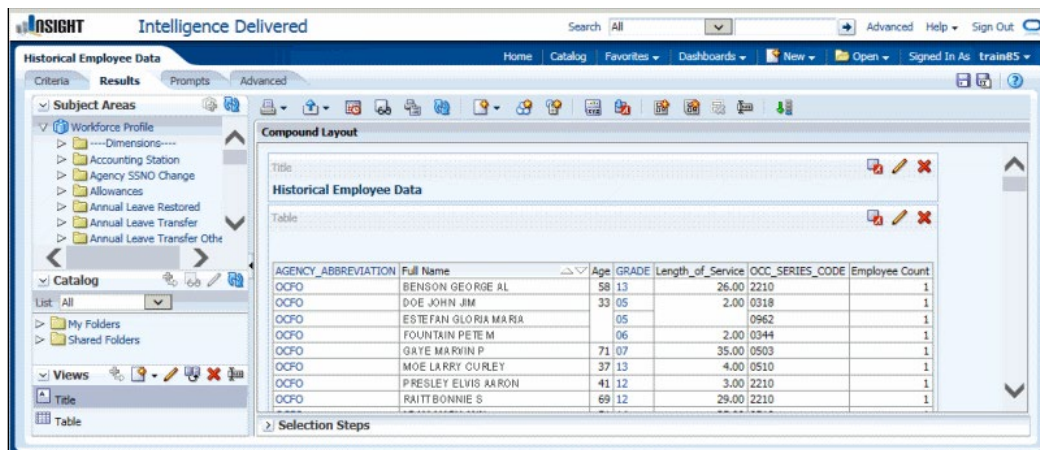


Figure 231: Results Tab With Concatenated Data Element

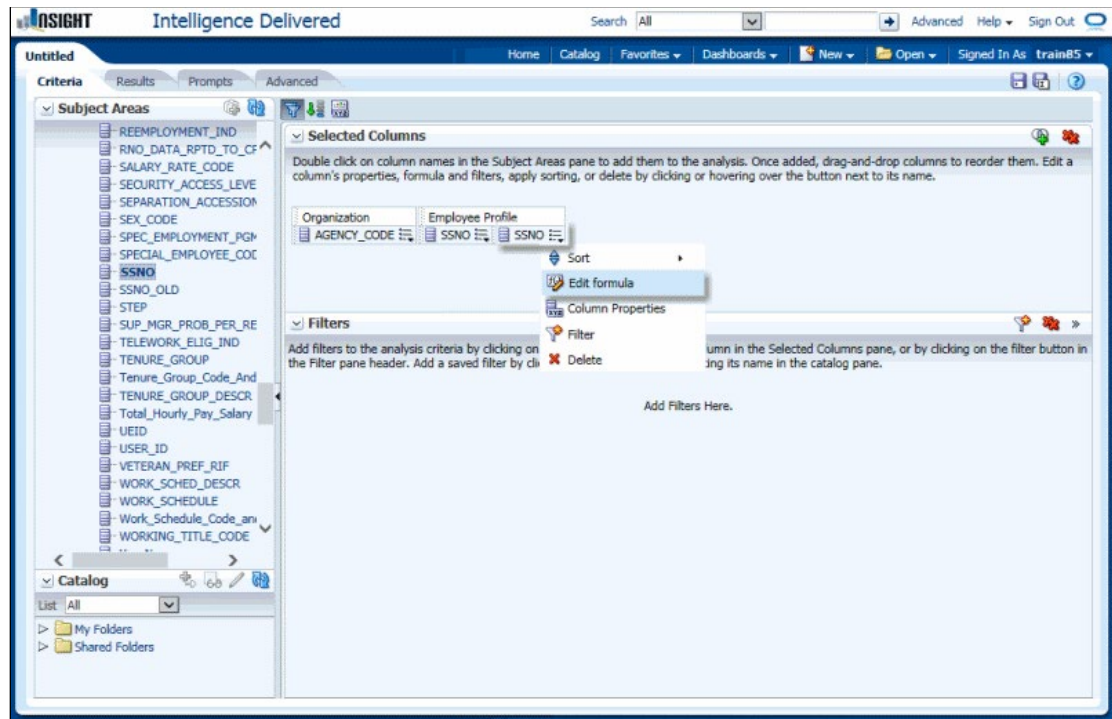
## Using the Running Aggregate Function

### To Use the Running Aggregate Function:

1. Navigate to the **Selected Columns** pane within the **Criteria** tab of the ad hoc report editing page.



2. Select the **Edit** icon for the desired data element. The Edit formula menu is displayed.
3. Select **Edit Formula** from the drop-down menu. The Edit Column Formula popup appears.



**Figure 232: Edit Formula Popup**

Note: Users can only apply formulas for scenarios that they are planning to measure data elements, not attributes or hierarchies.

4. View the Edit Formula popup to customize the Column Heading and apply formulas to the values within the column.
5. Select **Custom Headings** checkbox under the Column Heading field in the Column Formula tab.
6. Customize the new column heading with a title that indicates the result of the counted data elements from the Edit Column Formula popup.



Note: The customized Column Heading appears within the report when it is run.

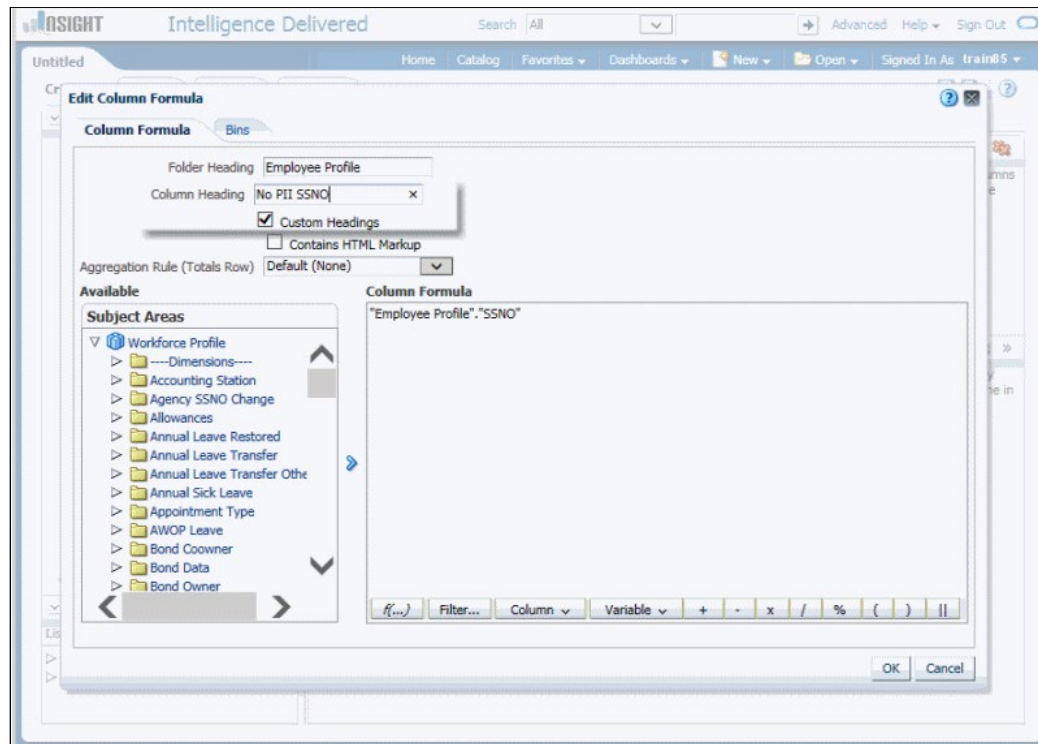
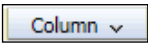


Figure 233: Edit Format Popup With Column Headings

7. Leave the Aggregation Rule at default, as this impacts the calculation users can apply to the table from the **Layout** pane.
8. Select **Column** to choose from a menu of data elements in the pane to use in the formula.
9. Select the targeted data element.

Icon Name	Definition	Icon
<b>Insert Criteria Column</b>	Allows the user to choose the data elements to use in the formula.	



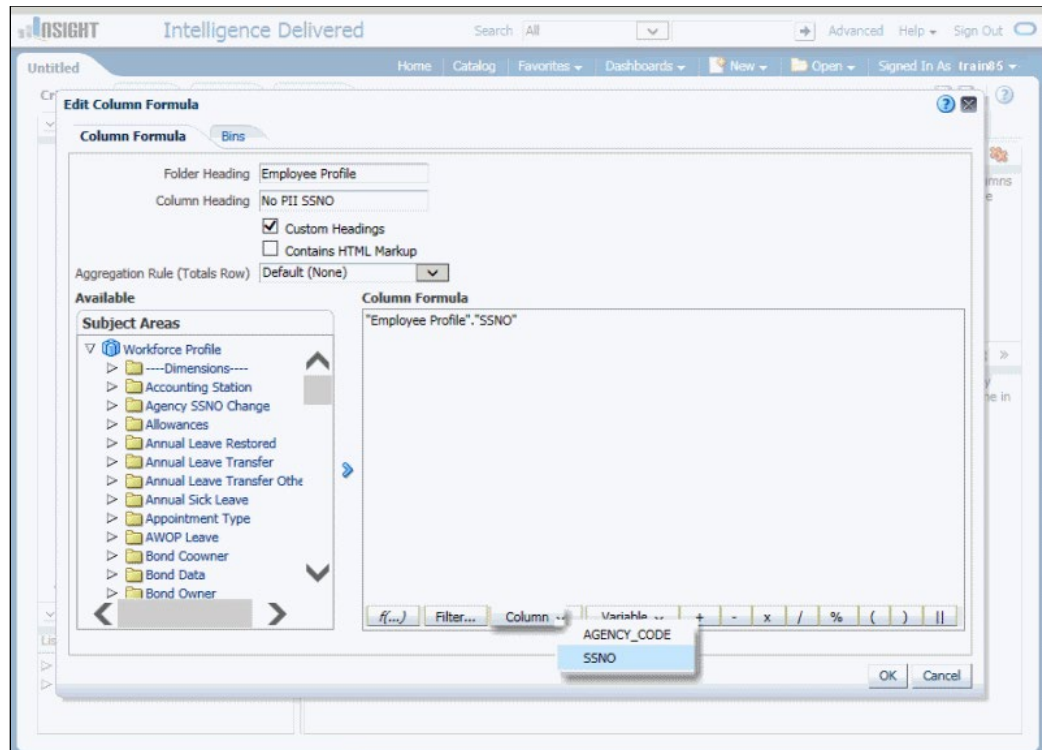
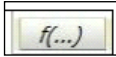
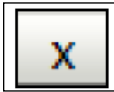



Figure 234: Edit Column Formula Column Drop-Down Menu

10. Confirm that the data element remains highlighted.
11. In the Column Formula workspace within the Edit Column Formula popup, select **Insert Function** from the menu of mathematical functions.



Icon Name	Definition	Icon
Insert Function	Contains a menu of functions to modify a data element.	

Note: Each time a user adds a data element or mathematical operation, the formula will be highlighted in the Column Formula workspace. Before adding another data element or mathematical operation, select the cursor where the new item will be added to avoid overwriting the existing formula.

Icon Name	Definition	Icon
Multiply	Increases the value by a define increment (e.g., to increase by 50 percent (%) use multiply (*)1.5	
Divide	Decreases the value by a defined increment (e.g., to decrease by 50 percent (%) use multiply (*) .5).	





Icon Name	Definition	Icon
Plus	Increases the value by a defined amount (e.g., to increase by 50, use plus (+) 50.	
Minus	Decreases the value by a defined amount (e.g., to decrease by 50, use minus (-) 50.	

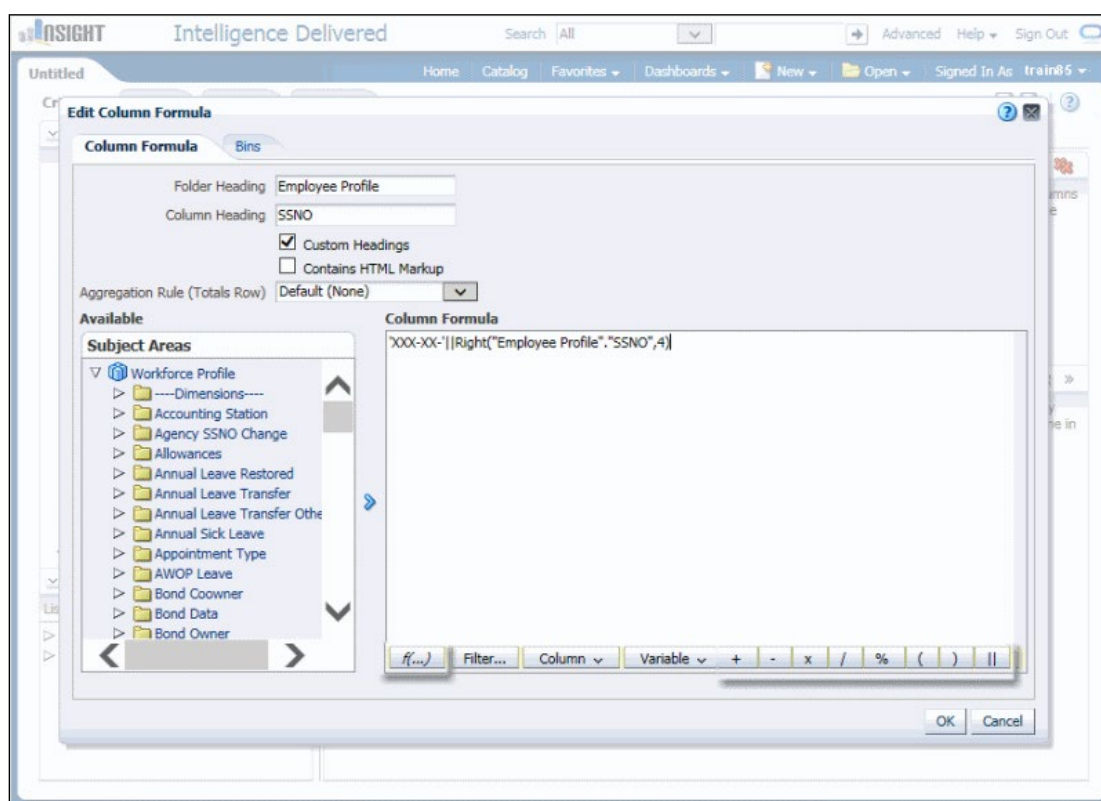


Figure 235: Edit Column Formula Function Icon and Mathematical Operations Icon

1. Select **Function**.

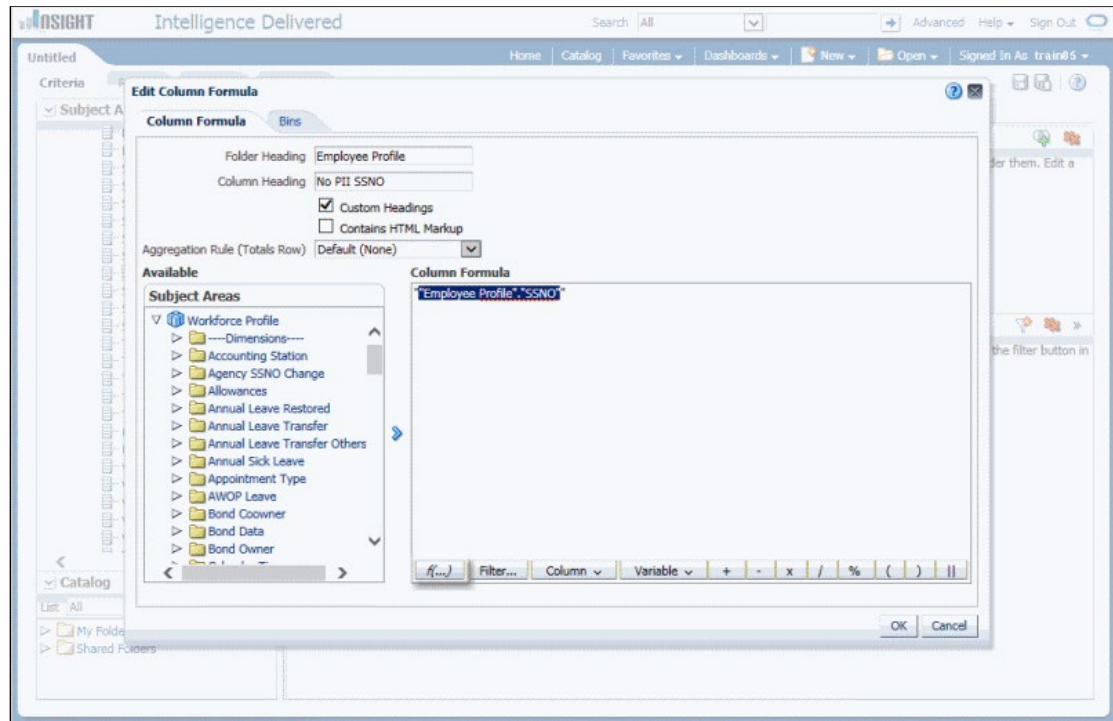
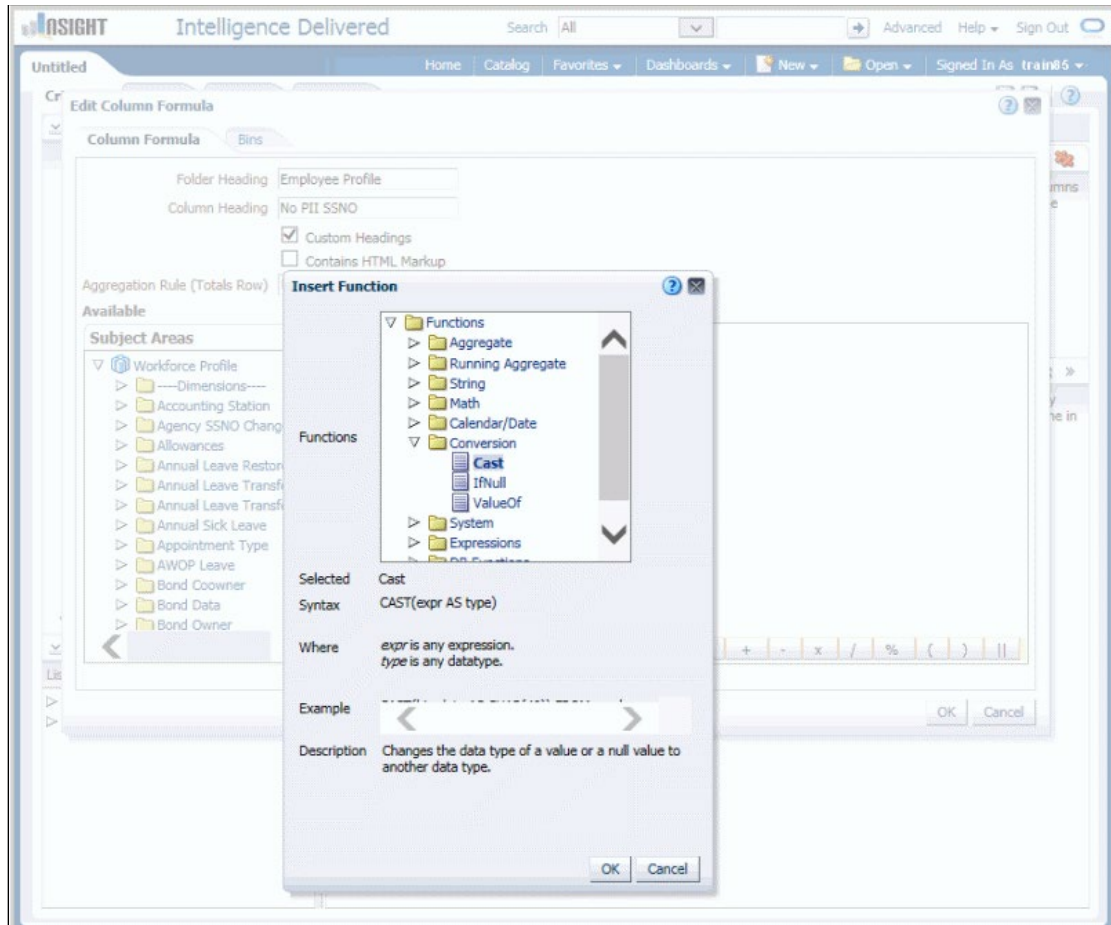


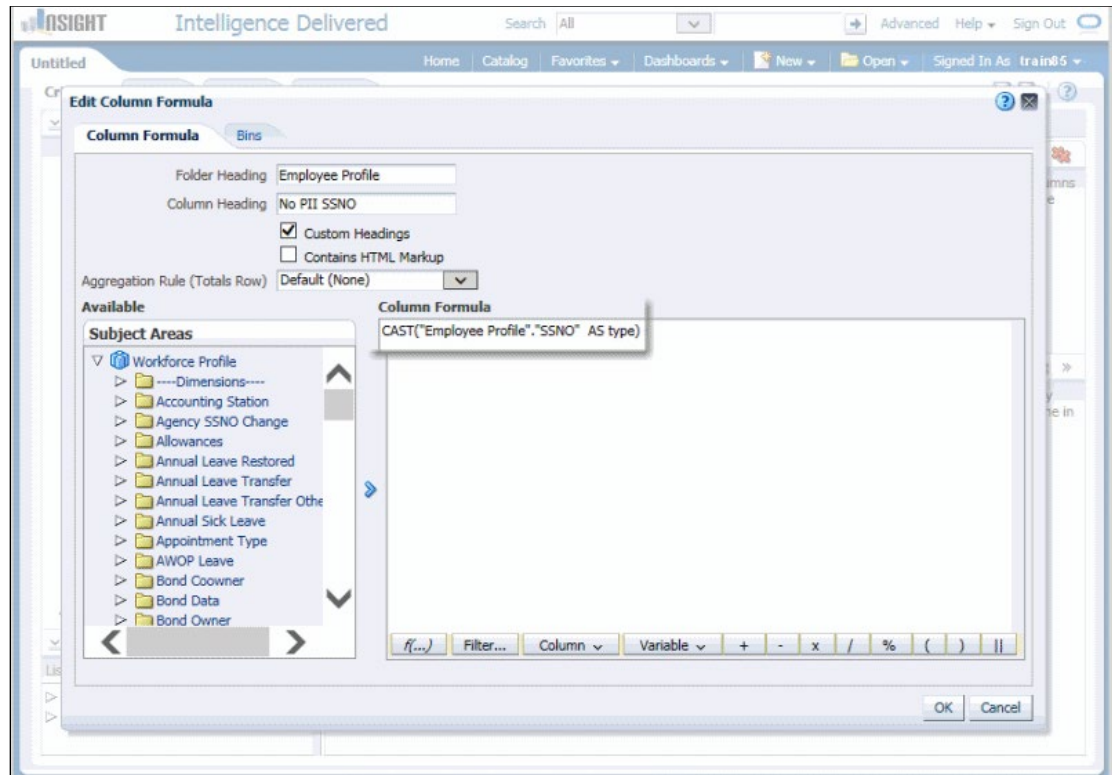
Figure 236: Function Icon With Column Formula Workspace

2. Double-click the **Conversion** folder to expand the folder. The folder is expanded.



**Figure 237: Insert Function Popup With Conversion**

3. Double-click **Cast** to apply the function to the data element. The word **CAST** will appear at the beginning of the formula.



**Figure 238: Column Formula Workspace**

4. Replace the type text with user's desired type text, (example: "CAST("Employee Profile"."SSNO" AS char(9)).

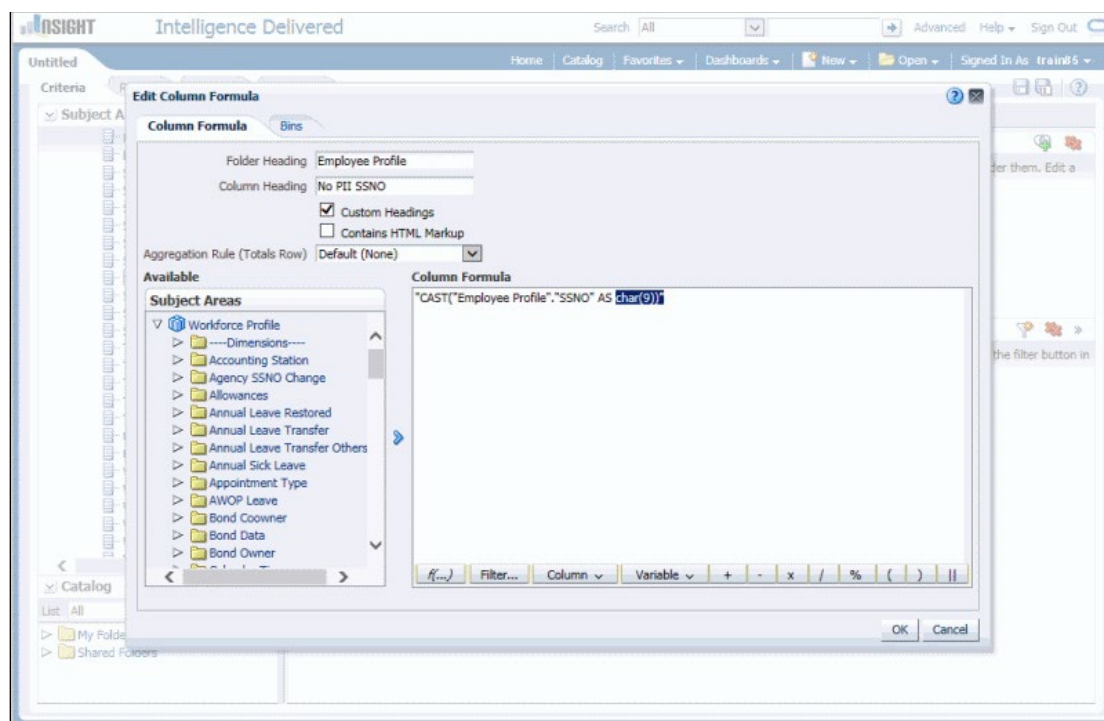


Figure 239: Cast Function Applied in the Column Formula Workspace







## Filters and Prompts

### Purpose of Filters and Prompts

Users can choose from four different mechanisms to control the amount of restriction applied to data within a report or dashboard. These mechanisms differ by:

- When the mechanism is applied - before, during, or after the report runs.
- If the mechanism is applied the same each time or can change.
- If the mechanism is a visible element of a report or a dashboard.

### Filters and Prompts

Filter	<ul style="list-style-type: none"> <li>• Restricts data the report runs</li> <li>• Applies every time the report runs</li> <li>• Not a visible component of the table or report; works behind the scene of a report</li> </ul>
Table Prompt	<ul style="list-style-type: none"> <li>• Enables users to select data restrictions after the report runs</li> <li>• May change each time the report runs</li> <li>• Visible element of a table that appears directly above the report table in the run view</li> </ul>
Report Prompt	<ul style="list-style-type: none"> <li>• Restricts data within a report each time the report runs</li> <li>• Visible elements of the report that appears on a page before the report is in the run view</li> </ul>
Dashboard Prompt	<ul style="list-style-type: none"> <li>• Enables users to select data restrictions after the dashboard runs</li> <li>• May change each time the dashboard runs</li> <li>• Visible components of the dashboard in the run view</li> </ul>

### Filters

Filters are applied within the **Criteria** tab of the ad hoc report editing page and restrict the data before the report is run.



Note: Filters that are applied to a report are listed in the **Filters** pane within the **Criteria** tab.

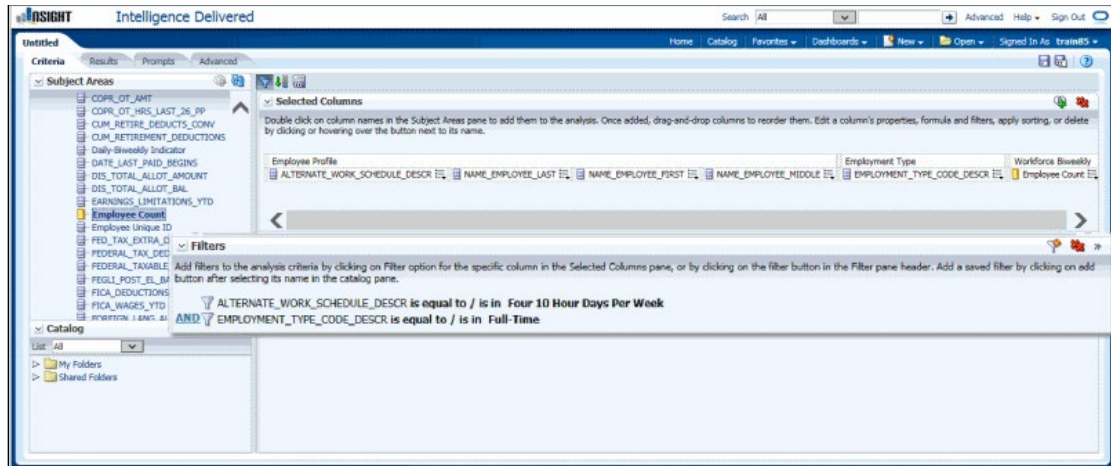


Figure 240: Filters Pane



## Report Prompts

Report prompts appear on the page preceding a report in the run view, allowing users to manipulate the restriction on the data each time the report runs.

The screenshot displays the INSIGHT application interface. The top section shows a report titled 'Employee Incentives (3Rs)' with various filters for Date of Action, Department Code, Agency Code, and Org Lvl 2 through Org Lvl 8. Below this, a second report titled 'COMP015: Cash Awards by Employee' is shown. This report includes a 'Filters' section with a complex filter expression: "NOA Code", "NOA\_CODE" IN ('840', '841', '842', '843', '844', '888', '849', '875', '885', '886', '887') and DEPARTMENT\_CODE is equal to / is in AG and AGENCY\_CODE is equal to / is in 90 and "Calendar Time", "YEAR\_ID" > 1990. A 'Pivot Table' section shows summary statistics: Total Number of Employees who Received Cash Awards (2,784), Total Number of Cash Awards (24,953), Total Value of Cash Awarded (\$19,477,283.73), and Average Award Amount (\$780.56). Below this, a 'Table' section displays a list of cash awards with columns: Org Structure, POI, Employee Name, Pay Plan, Occ Series, Grade/Step, Position Official Title, Award NOA Type, Award Code, Date Awarded, and Award Amount. Two rows of data are visible, showing awards for John Michael Doe and Larry Curpley.

Org Structure	POI	Employee Name	Pay Plan	Occ Series	Grade/Step	Position Official Title	Award NOA Type	Award Code	Date Awarded	Award Amount
AG9070400030200000000	5317	DOE, JOHN MICHAEL	GS	2210	11/05	ITSPEC (SYSANALYSIS)	841 - GROUP AWARD-CH AS	C112 - GROUP SPECIAL ACT OR SERVICE AWARD	7/27/2003	\$375.00
AG9070100040000000000	5317	MOE, LARRY CURPLEY	GS	2210	12/07	ITSPEC (PLCYPLN)	840 - INDIVIDUAL PERFORMANCE BASED	C011 - CASH AWARD - INDIVIDUAL PERFORMANCE BASED	11/22/2009	\$600.00

Figure 241: Report Prompts

- Report prompt selections restrict the data as it appears in a report in the run view.

## Dashboard Prompt

Dashboard prompts appear as a component of the dashboard, enabling users to change the restrictions on the data and immediately see the impact on the dashboard.

- Dashboard prompts are a visible component of the dashboard in the run view.

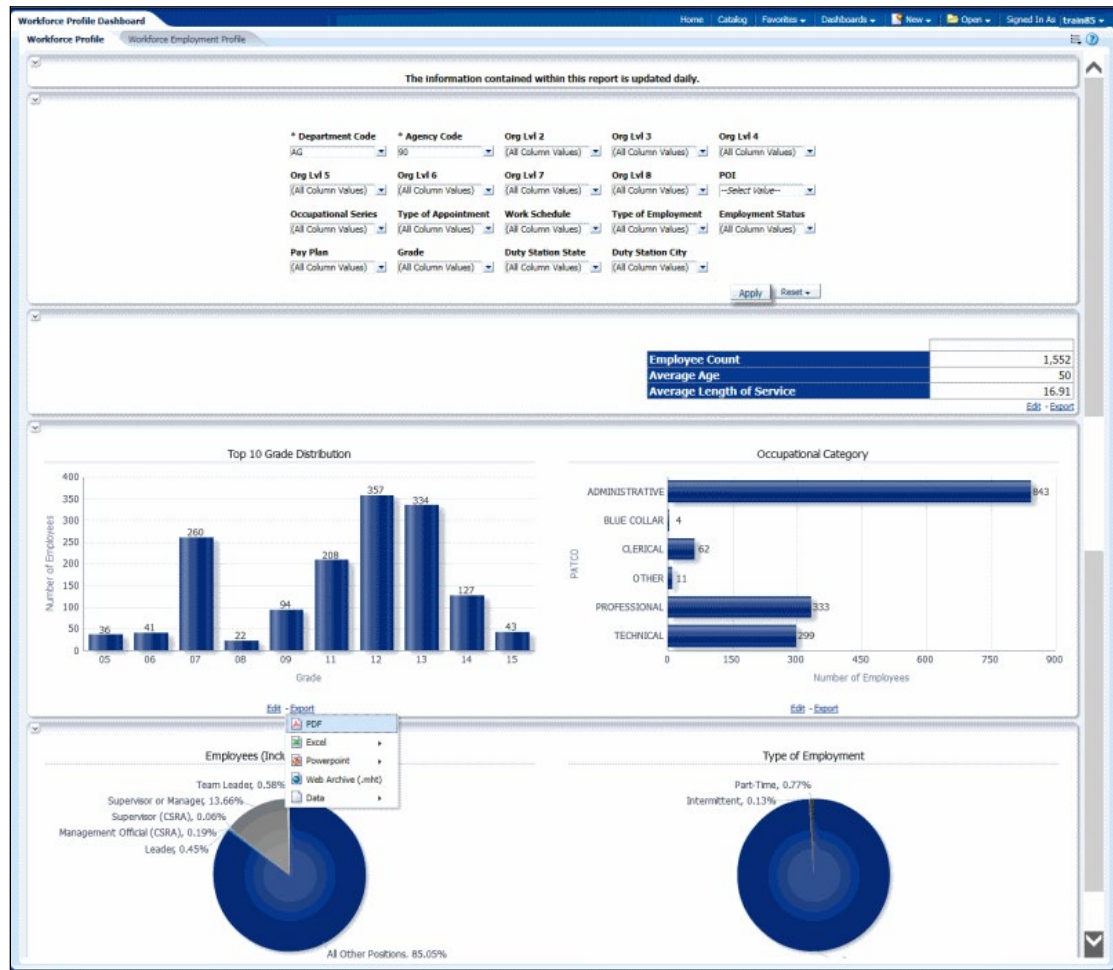


Figure 242: Creating a Dashboard Prompt

- Allows users to toggle between the amount of restriction on data in the dashboard after it is run.

## Accessing the Prompts Page

Report prompts will restrict data to custom ranges as a report runs. Report prompts appear on the page preceding a report in the run view, allowing users to manipulate the restriction on the data each time the report runs.

### To Access the Prompts page:

1. Select the **Open** action link. The Prompts page is displayed.

Many of the reports within the Common Report Library will contain a series of report prompts which allow the user to restrict data in a report each time it runs.



Note: Report prompts distinguished by an asterisk (\*) indicates a mandatory field.

**INSIGHT Intelligence Delivered**

COMP012: Employee Incentives (3Rs)

**Employee Incentives (3Rs)**

\* Date of Action  
Between [ ] - [ ]

\* Department Code [--Select Value--] \* Agency Code [--Select Value--] Org Lvl 2 [--Select Value--] Org Lvl 3 [--Select Value--] Org Lvl 4 [--Select Value--]

Org Lvl 5 [--Select Value--] Org Lvl 6 [--Select Value--] Org Lvl 7 [--Select Value--] Org Lvl 8 [--Select Value--] POI [--Select Value--]

Pay Plan [--Select Value--] Occupational Series [--Select Value--] Grade [--Select Value--]

Type of Appointment [--Select Value--] Work Schedule [--Select Value--] Type of Employment [--Select Value--]

Incentive Type (NOA Code) [--Select Value--]

Legal Authority [--Select Value--] 2nd Legal Authority [--Select Value--]

OK Reset

Edit - Refresh - Copy

**Figure 243: Prompts Page**

Note: After making selections in a drop-down prompt, click in the white space of the prompts page to accept the selections.

2. Use report prompts to restrict the data within a report. Users will interact with two different types of report prompts based on the type of data. Valid values are:
  - Drop-Down - Select from a list of potential values or type the selection directly into the values box.



INSIGHT Intelligence Delivered

COMP012: Employee Incentives (3Rs)

Home Catalog Favorites Dashboards New Open Signed In As train85

Employee Incentives (3Rs)

\* Date of Action  
Between [ ] [ ]

\* Department Code --Select Value--

\* Agency Code --Select Value--

Org Lvl 2 --Select Value--

Org Lvl 3 --Select Value--

Org Lvl 4 --Select Value--

Org Lvl 5 --Select Value--

Pay Plan --Select Value--

Type of Appointment --Select Value--

Incentive Type (NOA Code) --Select Value--

Legal Authority --Select Value--

2nd Legal Authority --Select Value--

Grade --Select Value--

Type of Employment --Select Value--

POI --Select Value--

OK Reset

Edit - Refresh - Copy

Figure 244: Drop-Down Prompt

- Calendar - Select the date (month, day, and year) from a Calendar View

INSIGHT Intelligence Delivered

COMP012: Employee Incentives (3Rs)

Home Catalog Favorites Dashboards New Open Signed In As train85

Employee Incentives (3Rs)

\* Date of Action  
Between [ ] [ ]

\* Department Code --Select Value--

\* Agency Code --Select Value--

Org Lvl 2 --Select Value--

Org Lvl 3 --Select Value--

Org Lvl 4 --Select Value--

Org Lvl 5 --Select Value--

Pay Plan --Select Value--

Type of Appointment --Select Value--

Incentive Type (NOA Code) --Select Value--

Legal Authority --Select Value--

2nd Legal Authority --Select Value--

Grade --Select Value--

Type of Employment --Select Value--

POI --Select Value--

OK Reset

Edit - Refresh - Copy

Figure 245: Calendar Prompt

Note: Some drop-down prompts will cascade based on user selection. For example, as a user selects Department, Agency Name will update to only the available Agencies within the selected Department.





Note: Reports that use time prompts, such as the calendar, contain historical data which allow users to restrict the date range based on prompt selections. When a report includes the option to choose between calendar year and fiscal year use one of the time prompts, not both. If the user use both, the data will be invalid.

3. Select **OK** to run the report.

The screenshot shows the 'Employee Incentives (3Rs)' report prompt page. The page has a blue header with the 'INSIGHT' logo and 'Intelligence Delivered' text. A search bar is located in the top right. Below the header, there are several sections of dropdown menus for filtering data. The first section is 'Date of Action' with a date range from 01/17/2011 to 01/01/2013. The second section is 'Department Code' with a dropdown menu. The third section is 'Agency Code' with a dropdown menu. The fourth section is 'Org Lvl 2' through 'Org Lvl 8' with dropdown menus. The fifth section is 'Pay Plan' with a dropdown menu. The sixth section is 'Occupational Series' with a dropdown menu. The seventh section is 'Grade' with a dropdown menu. The eighth section is 'Type of Appointment' with a dropdown menu. The ninth section is 'Work Schedule' with a dropdown menu. The tenth section is 'Type of Employment' with a dropdown menu. The eleventh section is 'Incentive Type (NOA Code)' with a dropdown menu. The twelfth section is 'Legal Authority' with a dropdown menu. The thirteenth section is '2nd Legal Authority' with a dropdown menu. At the bottom right, there are 'OK' and 'Reset' buttons. At the bottom left, there are links for 'Edit', 'Refresh', and 'Copy'.

Figure 246: Report Prompt Page With OK Button

Note: Select **Reset** to return all report prompts to the default view.

4. View the Report in the run view with the report name in the tab at the top left corner of the page. The report table, or other report components populate based on restrictions applied by the report prompts.




InSIGHT Intelligence Delivered

COMP012: Employee Incentives (3RIs)

Time run: 7/7/2013 10:41:07 AM

User: NFE000

Home

Catalog

Favorites

Dashboards

Now

Open

Signed In As

train85

Search

All

Advanced

Help

Sign Out

DATE\_PERS\_ACTN\_EFFECTIVE is between 01/17/2011 and 01/01/2013

and DEPARTMENT\_CODE is equal to AG

and AGENCY\_CODE is equal to 90

and "NOA Code": "NOA\_CODE" IN ('815', '816', '827')

Total Number of Employees who Received 3R Incentives Awarded	2
Total Number of 3R Incentives Awarded	7
Total Value of All 3R Incentives Awarded	\$148,215.00
Average Value of All 3R Incentives Awarded	\$21,173.57
Total Number of Recruitment Incentives Awarded	2
Total Value of Recruitment Incentives Awarded	\$7,000.00
Average Value of Recruitment Incentives Awarded	\$3,500.00
Total Number of Relocation Incentives Awarded	2
Total Value of Relocation Incentives Awarded	\$53,676.00
Average Value of Relocation Incentives Awarded	\$26,838.00
Total Number of Retention Incentives Awarded	3
Total Value of Retention Incentives Awarded	\$87,539.00
Average Value of Retention Incentives Awarded	\$29,179.67

\*Note only retention allowance actions with a dollar value of greater than \$0 are included in metrics.

Org Structure	POI	Employee Name	Pay Plan	Occ Series	Grade/Step	Position Official Title	Incentive Type (NOA Code)	Legal Authority Code	2nd Legal Authority Code	Recruitment Bonus	Recruitment %	Relocation Bonus	Relocation %	Retention Bonus	Retention %	NOA Effective Date
AG90401000000000000000	5317	DOE, JOHN	GS	2210	15/08	IT PROJ MGR	827 - RETENTION INCENTIVE	VPR	-					\$30,860.00	22%	11/4/2012
AG90401000300000000000	5317	MOE CURLEY LARRY	GS	2210	13/10	ITSPEC	827 - RETENTION INCENTIVE	VPR	-					\$19,146.00	18%	7/1/2012
AG90700801001000000000	5317	DOE, JANE	GS	0501	14/01	SUPVY FINANC OFFICR	816 - RELOCATION INCENTIVE	VPO	-			\$38,676.00	0%			10/7/2012

### Figure 247: Report Run View

## Basic Edits to Existing Common Reports - Add Report Prompts

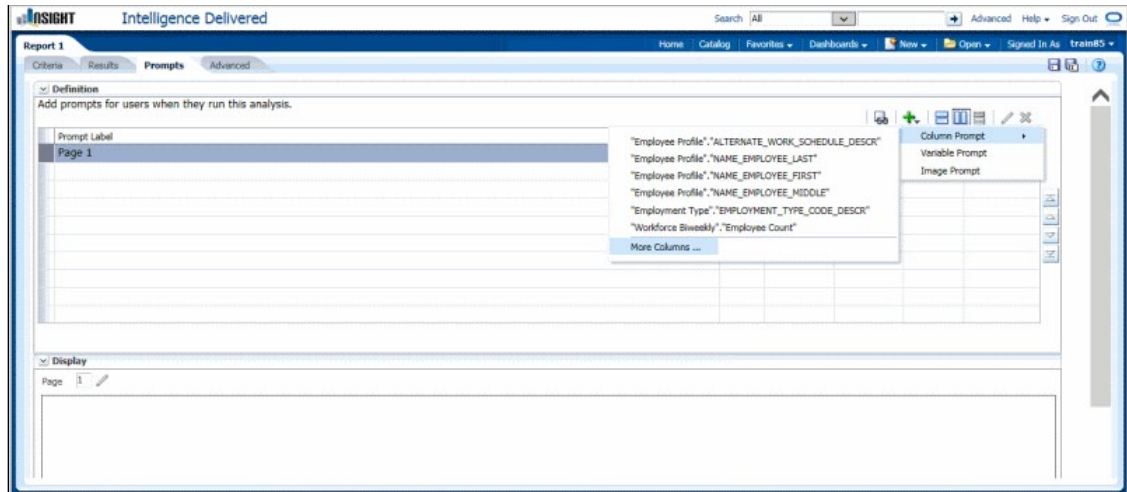
### To Use the Add Report Prompts Edits:

1. Select the **Prompts** menu option locate on the top navigation bar of the ad hoc report.
2. Select **New** icon from the Prompts tab navigation bar. The Prompts tab is displayed.

[illegible]

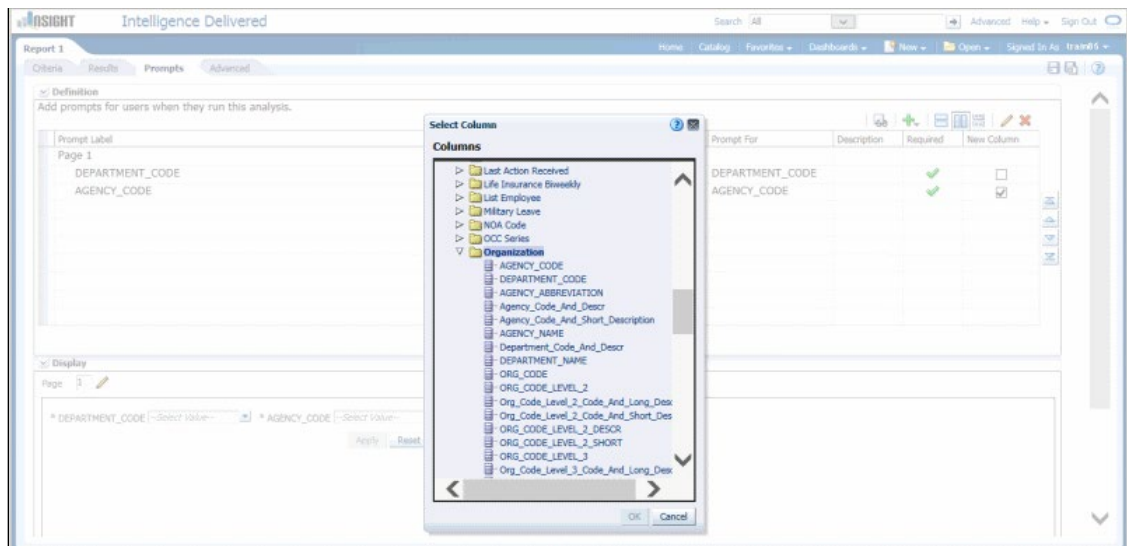
**Figure 248: Prompts Navigation Bar**

3. Select **Column Prompt** from the menu of options.
4. Select **More Columns**.



**Figure 249: More Column Option Within the New Icon Drop-Down Menu**

5. Select the targeted data elements.



**Figure 250: Columns Window With Targeted Data Element**

6. Select **OK** to close the popup.



The New Prompt popup appears. This popup contains options to specify the type of report prompt and value using the options.

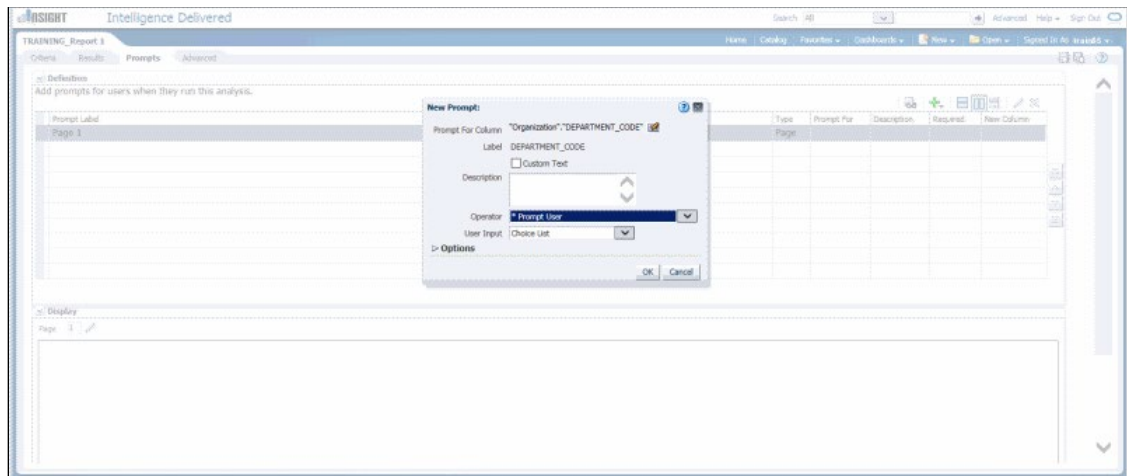


Figure 251: New Prompt Window With Operator Selection

7. Select an option from the **Operator** drop-down menu.
8. Select **Options** arrow to expand more options.

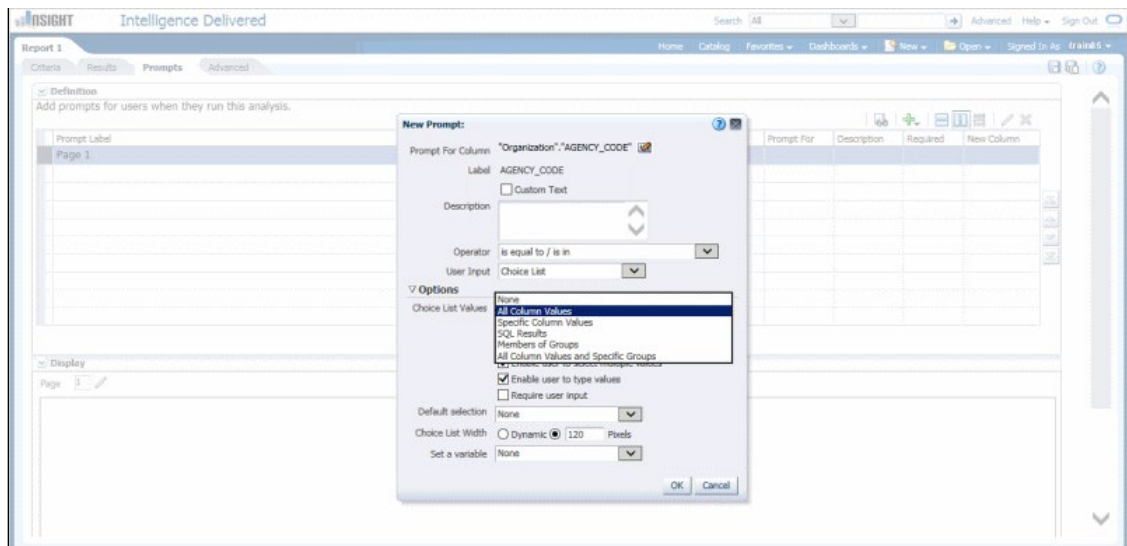
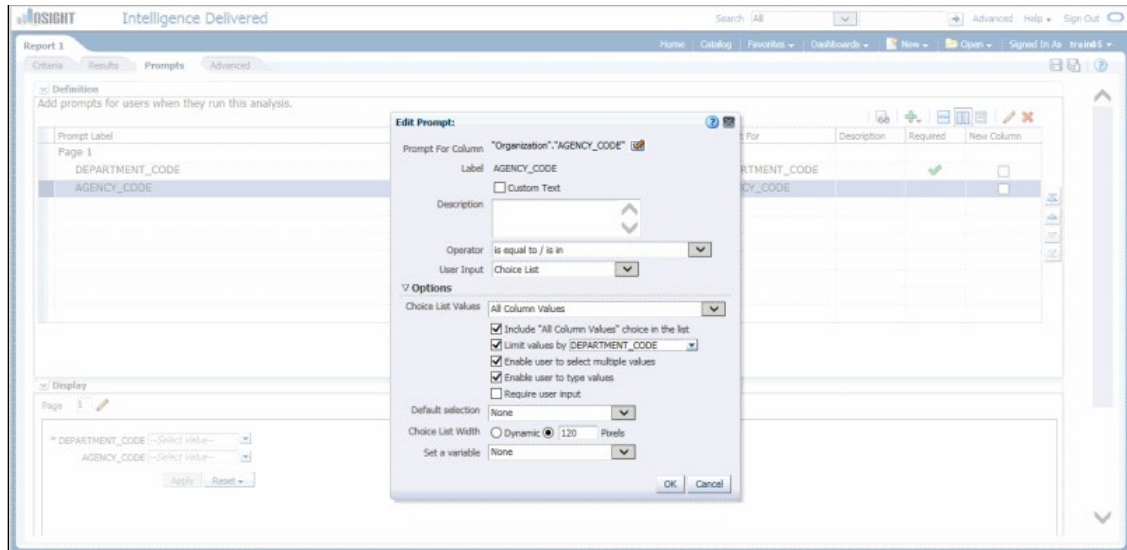


Figure 252: Choice List Values Options

9. Select **OK**.



**Figure 253: Edit a Column Prompt Within Prompt Label Pane**

10. To edit a column, highlight the Prompt Column in the Prompt Label pane.

11. Select **Edit** icon in the Prompts navigation bar.

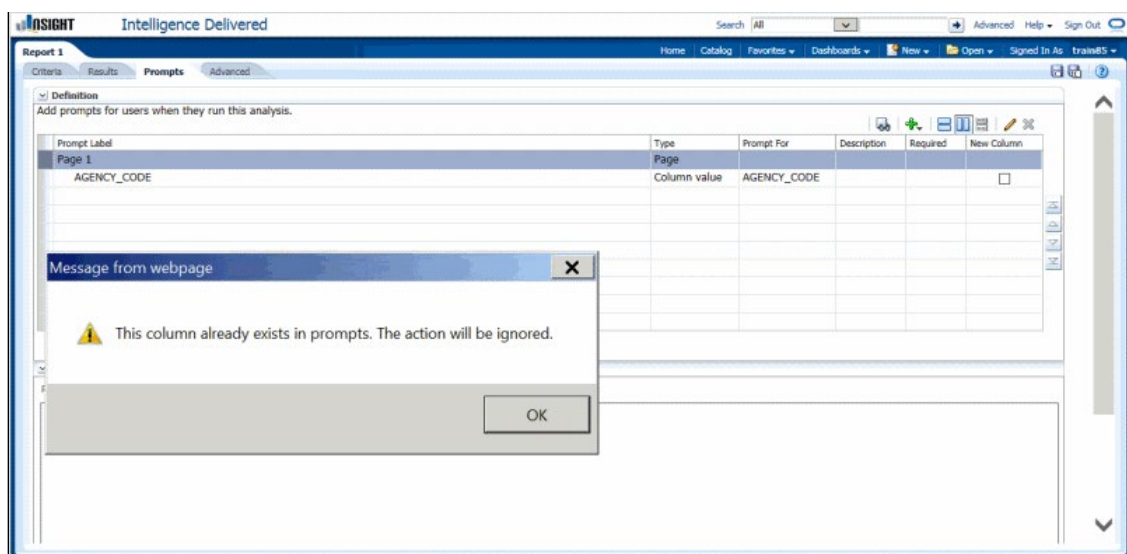
---

**Note:** To rename the new prompt, type a title in the Label workspace in the New Prompt field.

---

If a column is already added to the Prompt Label pane a message from the web page will appear, *This column already exists in prompts. The action will be ignored.*

12. Select **OK** to continue.



**Figure 254: Message Indicating Column Exists**

13. Select **Save As** once all prompts are completed.



**Report 1** Intelligence Delivered

Search All Advanced Help Sign Out

Home Catalog Favorites Dashboards New Open Signed In As train85

Criteria Results Prompts Advanced

**Definition**  
Add prompts for users when they run this analysis.

Prompt Label	Type	Prompt For	Description	Required	New Column
Page 1	Page				
DEPARTMENT_CODE	Column value	DEPARTMENT_CODE		✓	<input type="checkbox"/>
AGENCY_CODE	Column value	AGENCY_CODE		✓	<input checked="" type="checkbox"/>

**Display**

Page 1

\* DEPARTMENT\_CODE --Select value-- \* AGENCY\_CODE --Select value--

Apply Reset

**Figure 255: Completed Prompts Columns**

14. Select **Catalog** action link from the top navigation bar.
15. Expand My Folders to navigate to the desired report.

### ***Basic Edits to Existing Common Reports - Set Default Prompt Value(s)***

#### **To Set Default Prompt Value(s):**

1. Select the **Prompts** tab.
2. Select **Edit** action link from Run View
3. Highlight the desired prompt in the Definition pane.
4. Select **Edit** icon.



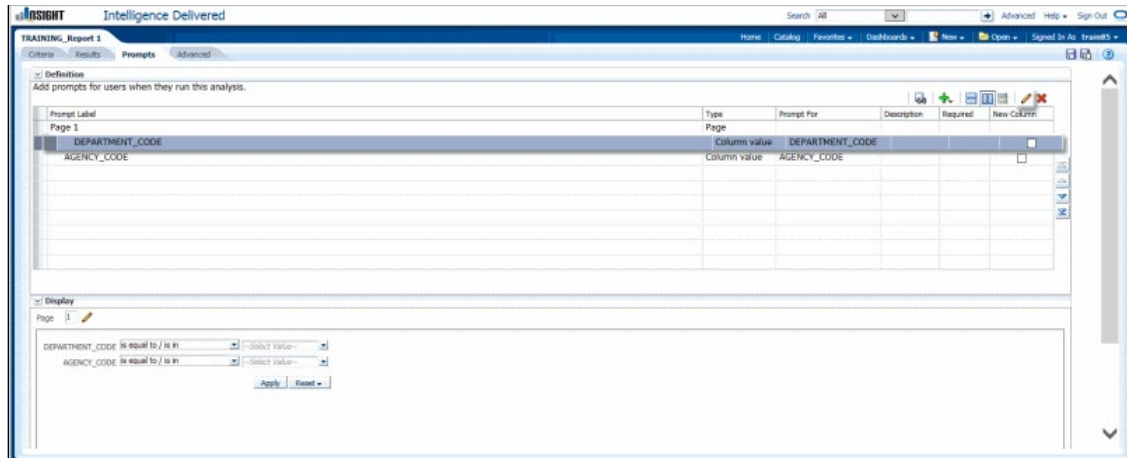


Figure 256: Definition Pane With Targeted Prompt and Edit Icon

5. **Expand Options** in the New Prompt pane to set a default prompt value.
6. Select **Specific Values** from the Default Selection drop-down menu. The Edit Prompt: Department Code popup appears.

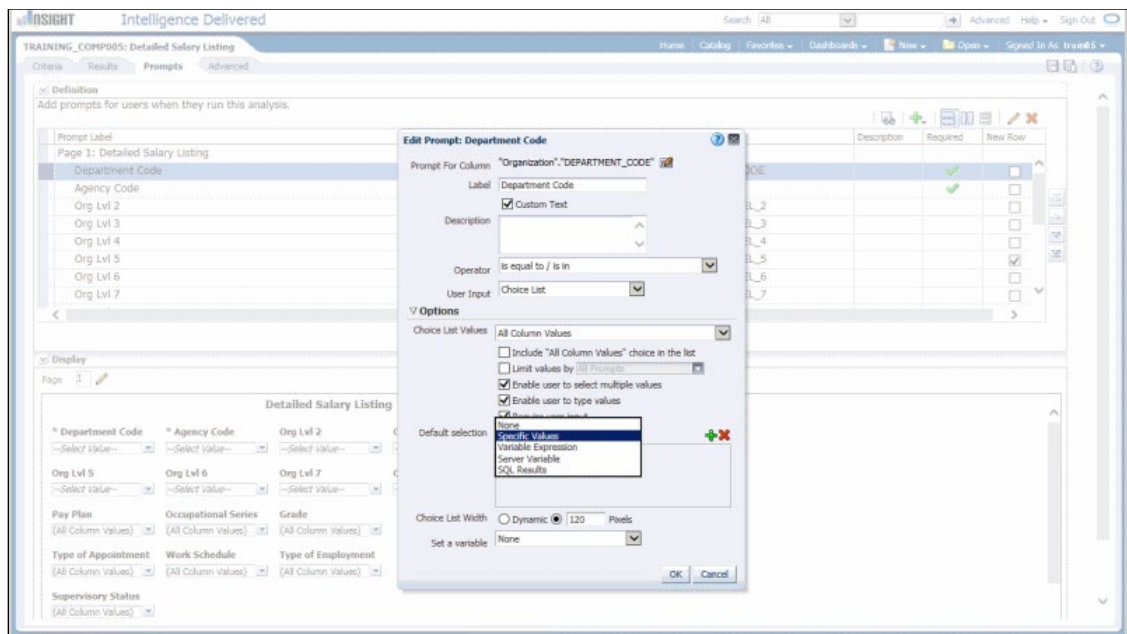


Figure 257: Edit Prompt Window With Default Selection

7. Select **Select Values**.

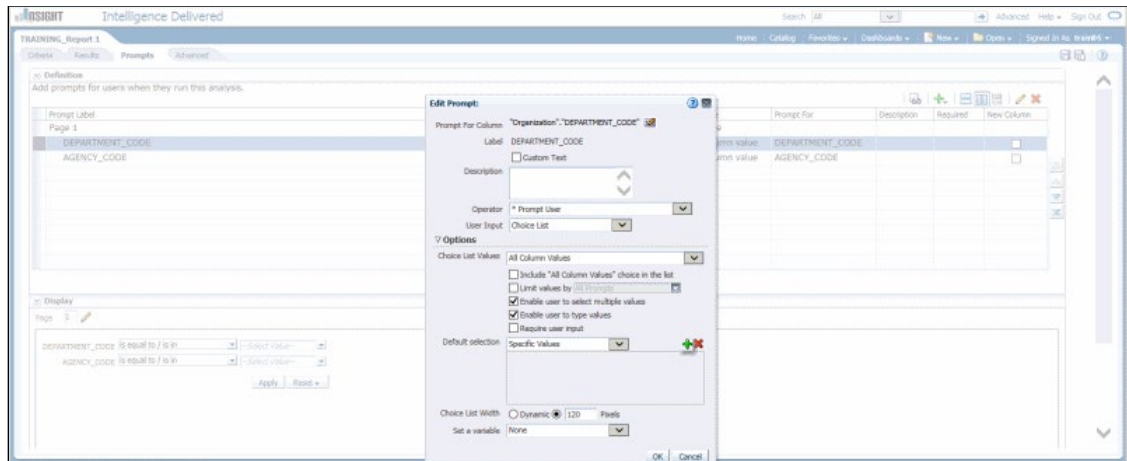







Figure 258: Edit Prompt Window With Select Values Icon

Icon Name	Definition	Icon
Select Values	Displays a list of available values to include in a report.	

- Find the desired value in the Available pane.
- Select the desired value.
- User can select value by using the **Move** icon

**OR**

Double-clicking the value.

Icon Name	Definition	Icon
Move	Displays the selected value(s) to the Selected pane.	
Move All	Displays all of the values(s) to the Selected pane.	
Reverse Move	Displays the value(s) back to the Available pane.	
Reverse All	Displays all of the values back to the Available pane.	

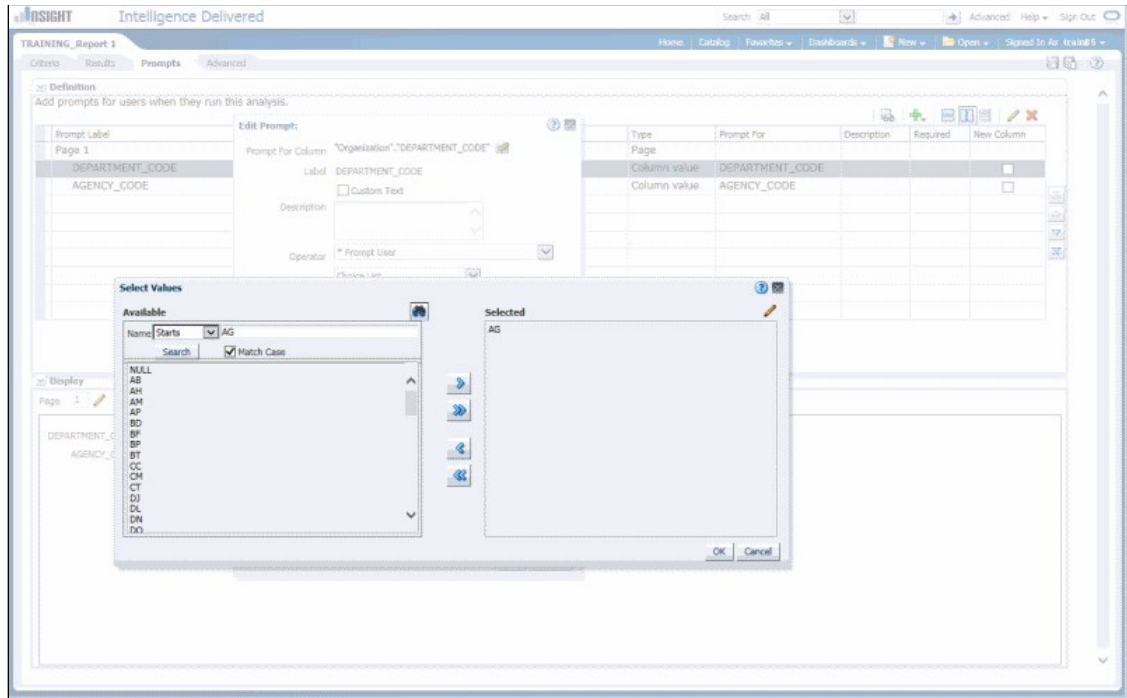


Figure 259: Select Values Window With Available Options

11. Select **OK** to close the Select Values popup.
12. Select **Save** icon to save the report.
13. Select **Home** action link to return to the home page.
14. Select **Open** action link for the targeted report.

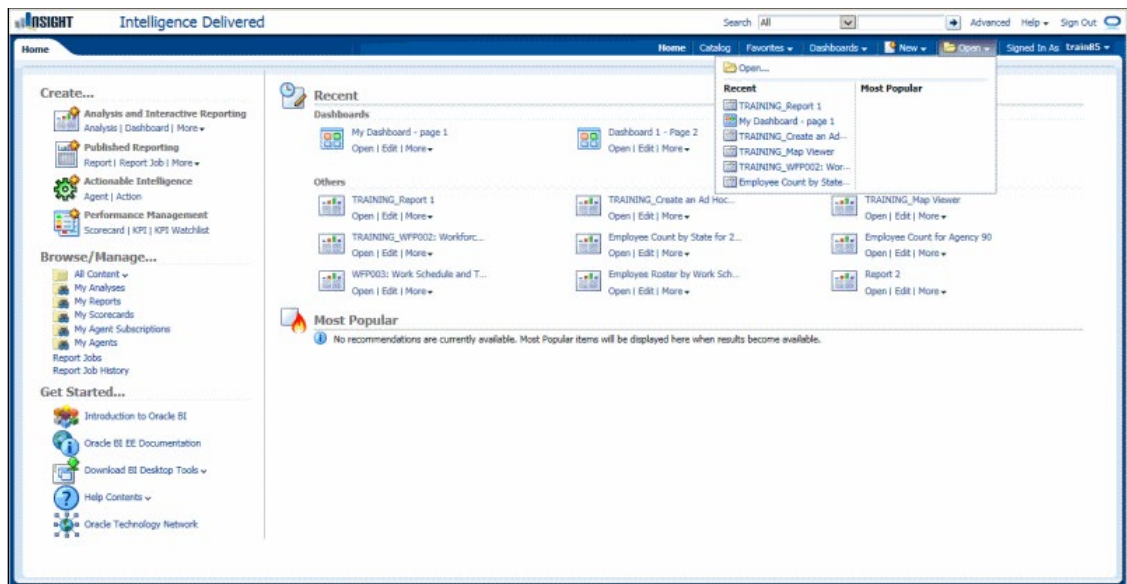


Figure 260: Open Action Link With the Recent Reports



15. Select the appropriate report prompts to restrict the report.

The screenshot shows the 'TRAINING\_Report 1' interface. At the top, there are search and navigation buttons. Below, there are two filter prompts: 'DEPARTMENT\_CODE is equal to / is in' with a dropdown menu showing 'AG', and 'AGENCY\_CODE is equal to / is in' with a dropdown menu showing '90'. There are 'OK' and 'Reset' buttons. At the bottom left, there are links for 'Edit', 'Refresh', and 'Copy'.

Figure 261: Restrict a Report

16. Select **Results** tab.

The screenshot shows the 'RESULTS' tab of the 'TRAINING\_Report 1' interface. On the left, there is a 'Subject Areas' tree with 'Workforce Profile' expanded. Below it is a 'Catalog' section with 'List: All' and 'My Folders' and 'Shared Folders'. At the bottom left, there is a 'Views' section with 'Table' selected. The main area displays a 'Compound Layout' with a table titled 'TRAINING\_Report 1'. The table has the following columns: EMPLOYMENT\_TYPE\_CODE\_DESCR, NAME\_EMPLOYEE\_LAST, NAME\_EMPLOYEE\_FIRST, NAME\_EMPLOYEE\_MIDDLE, ALTERNATE\_WORK\_SCHEDULE\_DESCR, Employee Count, DEPARTMENT\_CODE, and AGENCY\_CODE. The table contains three rows of data.

EMPLOYMENT_TYPE_CODE_DESCR	NAME_EMPLOYEE_LAST	NAME_EMPLOYEE_FIRST	NAME_EMPLOYEE_MIDDLE	ALTERNATE_WORK_SCHEDULE_DESCR	Employee Count	DEPARTMENT_CODE	AGENCY_CODE
Full-Time	DOE	JOHN	J	Four 10 Hour Days Per Week	1	AG	90
Full-Time	MOE	LARRY	CURLLEY	Four 10 Hour Days Per Week	1	AG	90
Full-Time	DOE	SALLY	SUE	Four 10 Hour Days Per Week	1	AG	90

Figure 262: Result for Set Default Prompt Values Report



## Creating Prompts

Prompts are created in the **Prompts** tab of the ad hoc report editing page to restrict data each time a report runs. Users can also set default values for report prompts.

**COMP012: Employee Incentives (3Rs)**

Criteria Results **Prompts** Advanced

Definition  
Add prompts for users when they run this analysis.

Prompt Label	Type	Prompt For	Description	Required	New Row
Page 1: Employee Incentives (3Rs)	Page				
Date of Action	Column value	DATE_PERS_ACTN_EFFECTIVE		✓	<input type="checkbox"/>
Department Code	Column value	DEPARTMENT_CODE		✓	<input type="checkbox"/>
Agency Code	Column value	AGENCY_CODE		✓	<input type="checkbox"/>
Org Lvl 2	Column value	ORG_CODE_LEVEL_2			<input type="checkbox"/>
Org Lvl 3	Column value	ORG_CODE_LEVEL_3			<input type="checkbox"/>
Org Lvl 4	Column value	ORG_CODE_LEVEL_4			<input type="checkbox"/>
Org Lvl 5	Column value	ORG_CODE_LEVEL_5			<input type="checkbox"/>
Org Lvl 6	Column value	ORG_CODE_LEVEL_6			<input type="checkbox"/>

Display  
Page 1

**Employee Incentives (3Rs)**

\* Date of Action  
Between: [ ] [ ]

\* Department Code: --Select Value--

\* Agency Code: --Select Value--

Org Lvl 2: --Select Value--

Org Lvl 3: --Select Value--

Org Lvl 4: --Select Value--

Org Lvl 5: --Select Value--

Org Lvl 6: --Select Value--

Org Lvl 7: --Select Value--

Org Lvl 8: --Select Value--

POI: --Select Value--

Pay Plan: --Select Value--

Occupational Series: --Select Value--

Grade: --Select Value--

Type of Appointment: --Select Value--

Work Schedule: --Select Value--

Type of Employment: --Select Value--

Incentive Type (NOA Code)

Figure 263: Prompts Tab and Report Prompts



## Creating Table Prompts

Table prompts allow users to manipulate data restrictions in a report from the run view. To create a Table prompt, drag and drop data elements in the Layout pane. Table prompt includes a drop-down menu of options to restrict data in the report after it runs.

DATE\_PERS\_ACTN\_EFFECTIVE is between 01/17/2011 and 01/01/2013  
and DEPARTMENT\_CODE is equal to AG  
and AGENCY\_CODE is equal to 90, 96, 98  
and "NOA Code", "NOA\_CODE" IN ('BLS', 'BIS', 'B27')

Total Number of Employees who Received 3R Incentives Awarded	7
Total Number of 3R Incentives Awarded	7
Total Value of All 3R Incentives Awarded	\$148,215.00
Average Value of All 3R Incentives Awarded	\$21,173.57
Total Number of Recruitment Incentives Awarded	2
Total Value of Recruitment Incentives Awarded	\$7,000.00
Average Value of Recruitment Incentives Awarded	\$3,500.00
Total Number of Relocation Incentives Awarded	2
Total Value of Relocation Incentives Awarded	\$53,676.00
Average Value of Relocation Incentives Awarded	\$26,838.00
Total Number of Retention Incentives Awarded	3
Total Value of Retention Incentives Awarded	\$87,539.00
Average Value of Retention Incentives Awarded	\$29,179.67

\*Note only retention allowance actions with a dollar value of greater than \$0 are included in metrics.

Org Structure	PO	Employee Name	Occ Series	Grade/Step	Position Official Title	Incentive Type (NOA Code)	Legal Authority Code	2nd Legal Authority Code	Recruitment Bonus	Recruitment %	Relocation Bonus	Relocation %	Retention Bonus	Retention %	NOA Effective Date
AG90702000000000000000	5317	MOE, CUNLEY LEE	0340	00/00	DIR, GOVT EMPLOYEES SERVICES DIV	827 - RETENTION INCENTIVE	VRN	-					\$37,533.00	25%	12/30/2012

Figure 264: Table Prompts

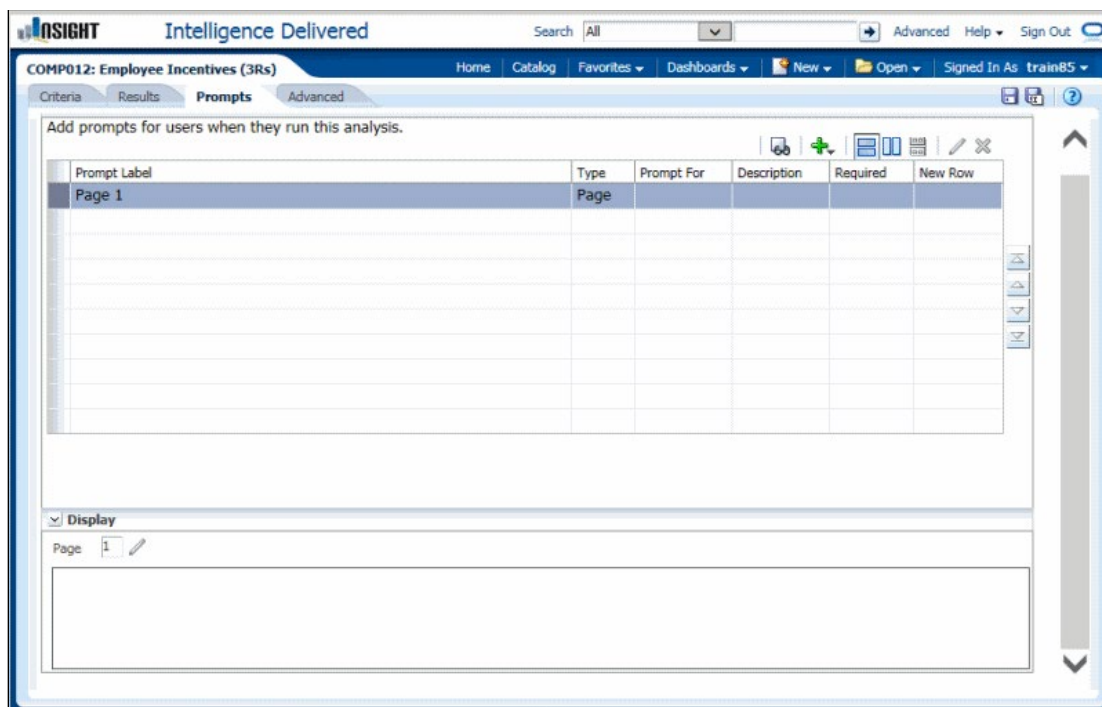
## Creating a New Report Prompt

Prompts are created in the Prompts tab of the ad hoc report editing page to restrict data each time a report runs. Users can also set default values for report prompts.

### To Build Report Prompts:

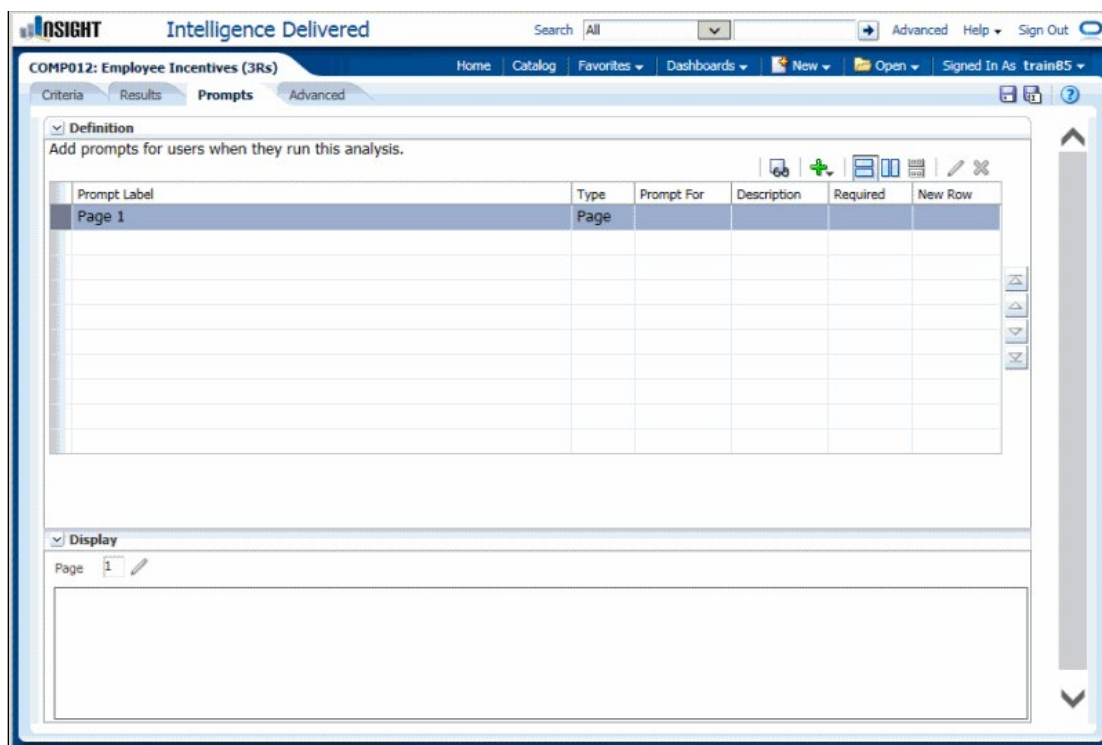
1. Select the **Prompts** tab of the **ad hoc report editing** page. The Prompts tab is displayed.





### Figure 265: Report Prompts Tab

2. Select **New** icon from the **Prompts** tab navigation bar.



**Figure 266: Prompts Tab Navigation Bar with New Icon**

3. Select **Column Prompt** from the menu of options.

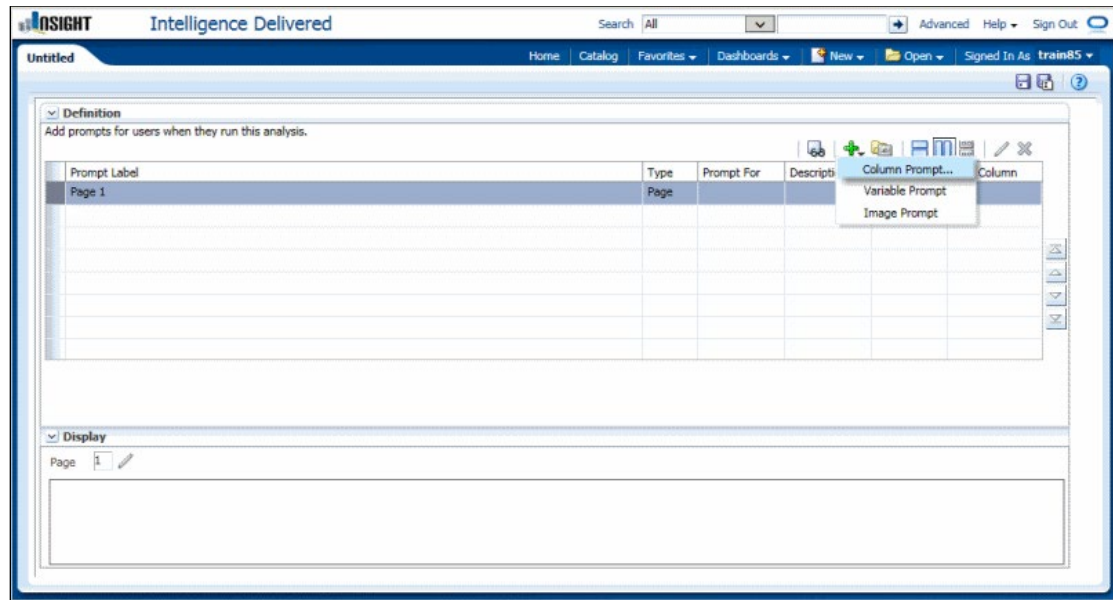


Figure 267: New Prompt Icon with Column Prompt Option

4. Select the desired data element from the **Column Prompt** drop-down menu.

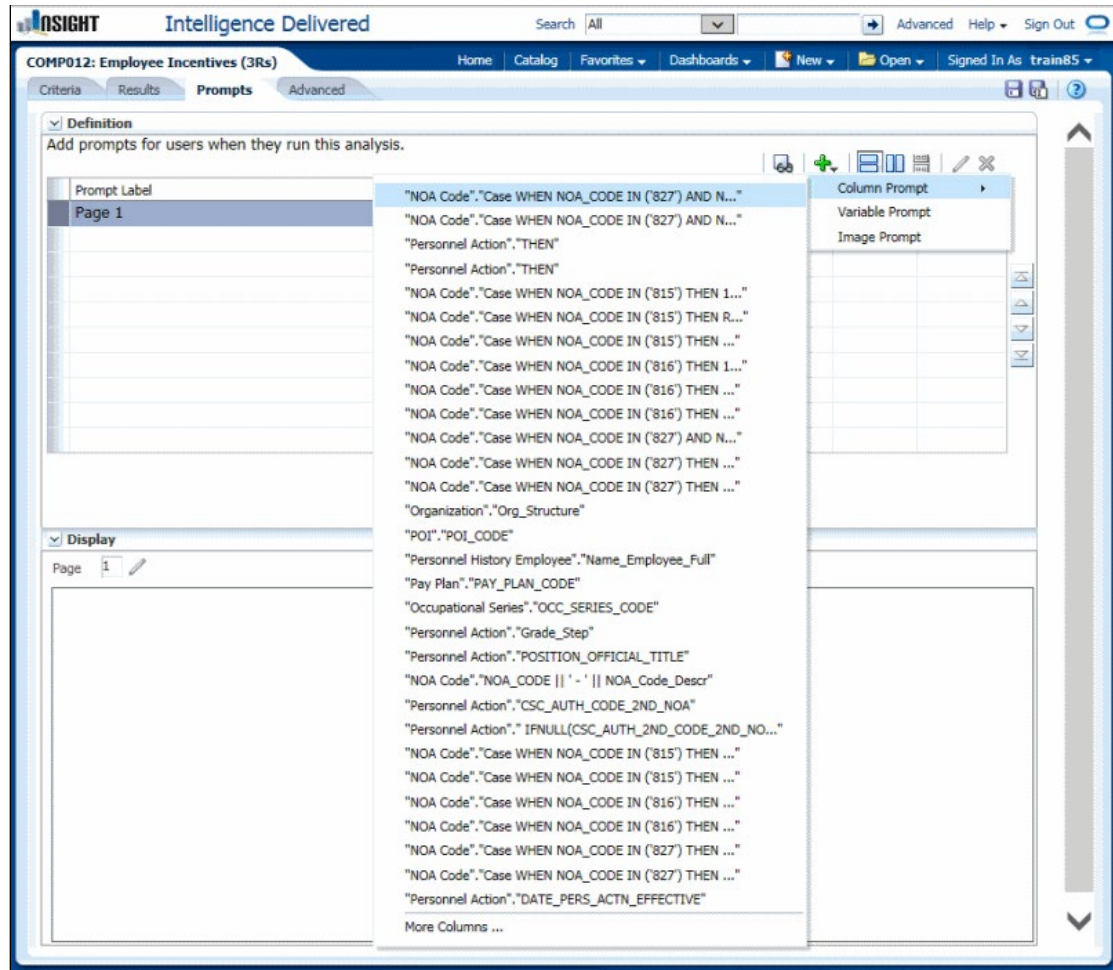
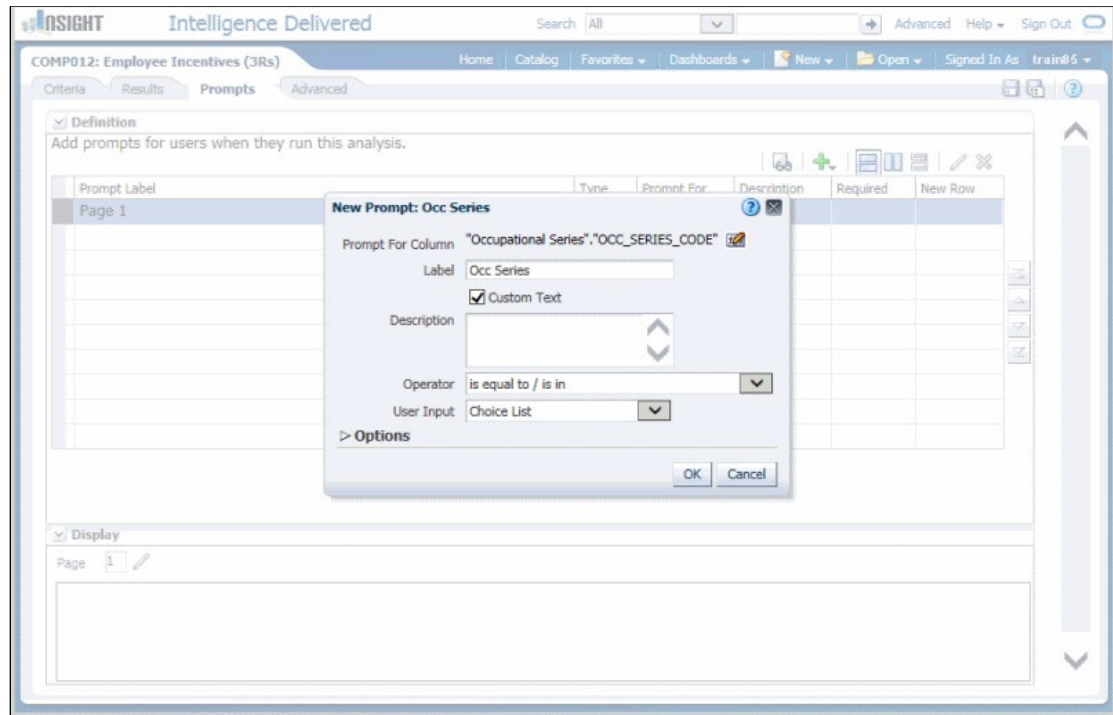


Figure 268: Column Prompt Drop-Down Menu

Note: By selecting **More Columns**, a user can create a report prompt on a data element not represented as a column in the report.

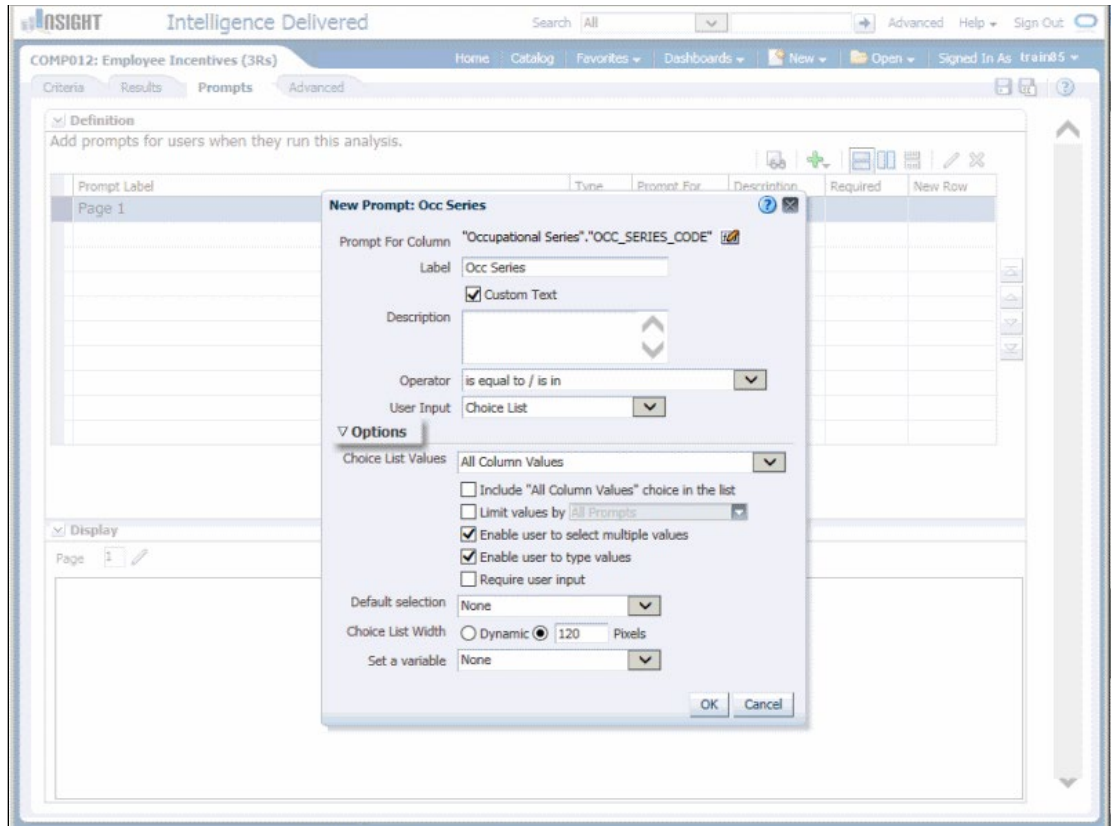
5. View the **New Prompt** popup. This allows the user to customize the prompt. Valid values are:
  - **Prompt For Column:** References the selected data element.
  - **Label:** Customizes the text that appears next to the prompt.
  - **Description:** Customizes the text that appears as a user hovers over the prompt label.
  - **Operator:** Allows the user to select the logical operation that will be applied for the prompt (e.g., is equal to, is greater than, is less than).
  - **User Input:** Determines the appearance of the prompt as a text field, choice list, slider, checkbox, radio button, list box, or calendar.



**Figure 269: New Prompt Window**

Note: The User Input options will depend on the type of data being prompted (e.g., Calendar dates are the only data that can be prompted by a calendar selection).

6. Expand **Options** to view additional customizations available to the report prompt, including All Column Values, Require User Input, etc. A list of options is displayed.



**Figure 270: New Prompt Window with Options Section**

7. Select **OK** to return to the **Prompts** tab.
8. View the prompt listed vertically within the Prompts workspace, documenting the Prompt Label, Prompted For (data element targeted by the prompt), etc.

Note: The New Column checkbox will update based on the user's selection of the Horizontal Layout icon and the Vertical Layout icon which structures the prompts page layout. The arrows along the right side of the Prompts workspace allow the user to change the order of the prompts on the Prompts page.



The **Display** pane previews the report prompts as they will appear on the Prompts page preceding the report in run view.

The screenshot shows the 'Insight' application interface with the 'Prompts' tab selected. The 'Definition' pane contains a table for defining prompts. The 'Display' pane shows a preview of the 'Occ Series' prompt.

Prompt Label	Type	Prompt For	Description	Required	New Row
Page 1	Page				
Occ Series	Column value	OCC_SERIES_CODE			<input type="checkbox"/>

**Display**

Page 1

Occ Series --Select Value--

Apply Reset

Figure 271: Prompts Workspace with Prompt Preview

9. Select the desired prompt.
10. Select **Delete** icon to remove the prompt from the report.



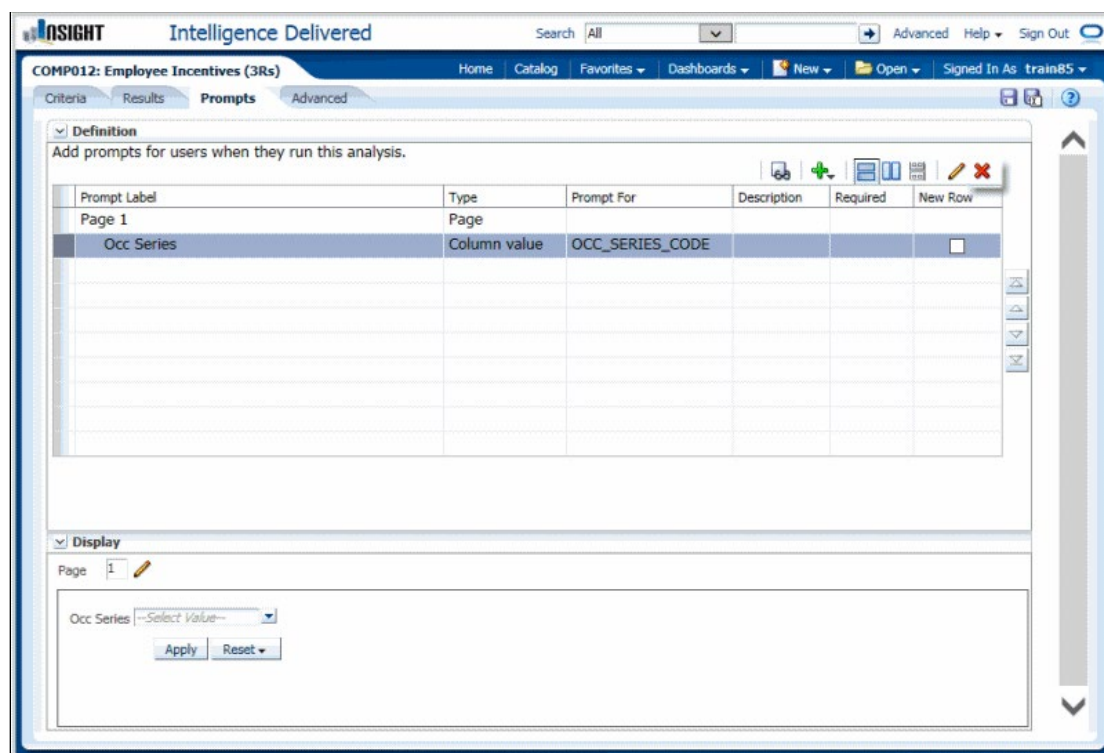


Figure 272: Prompts Workspace With Delete Icon

Note: Once the user selects the prompt, it will be highlighted in the Prompts workspace.

## Linking Dashboard Prompts to Reports in the Dashboard

### To Link Dashboard Prompts:

1. Select **Catalog** action link from the top navigation bar.
2. Navigate to the report which will be impacted by the dashboard prompt.
3. Select the corresponding **Edit** action link to open the ad hoc report editing page. The applicable ad hoc report editing page is displayed.

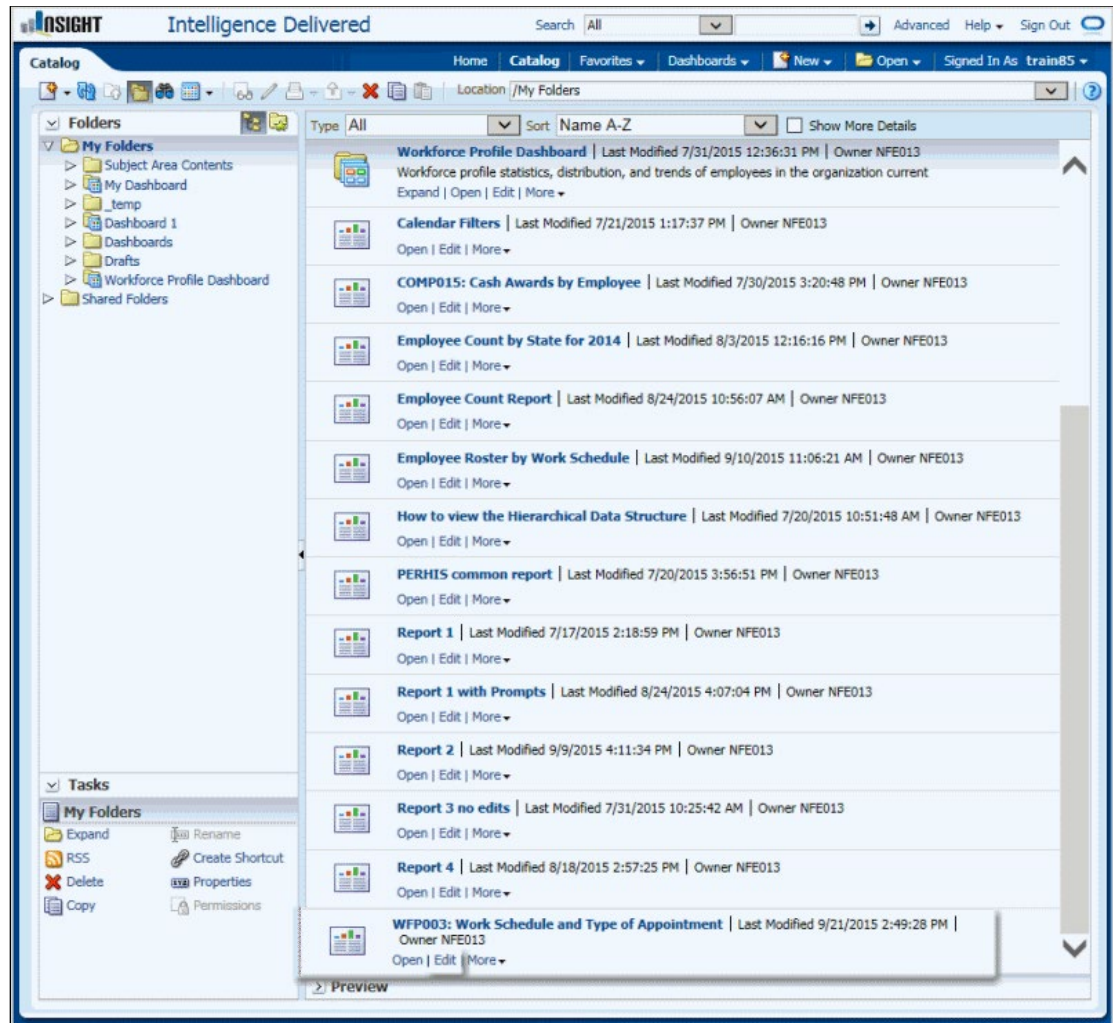
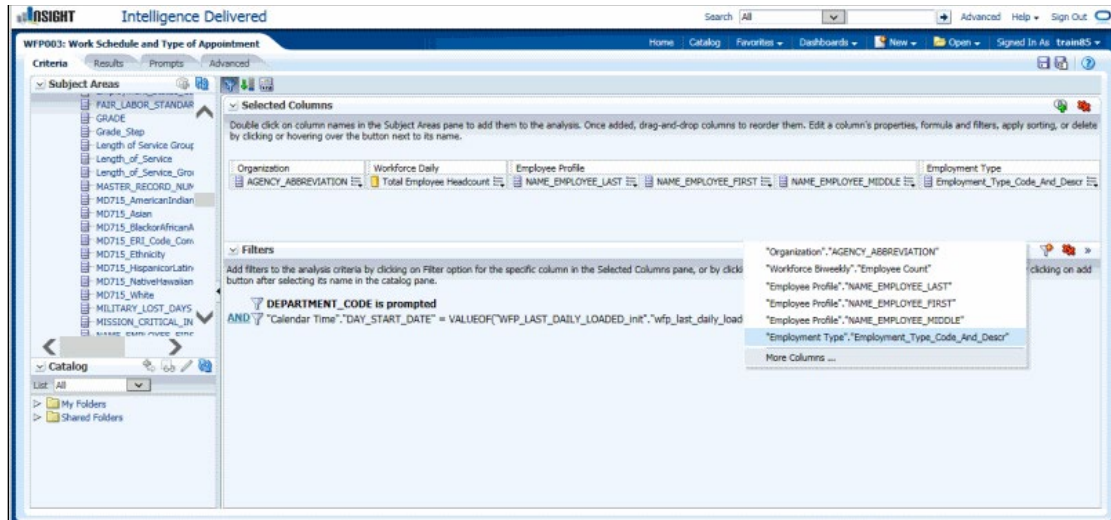


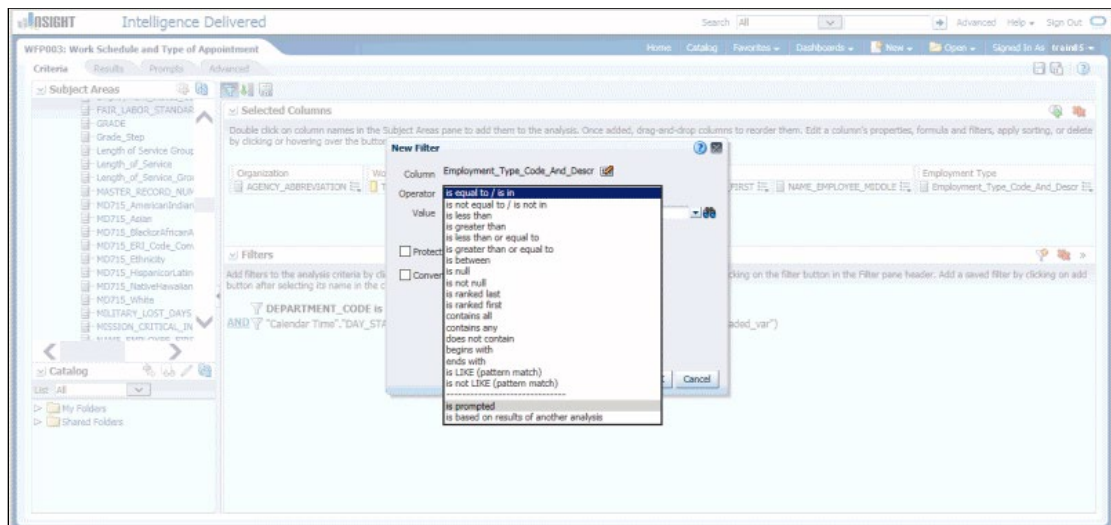
Figure 273: Report in Catalog With Edit Action Link

4. Select **Filters** icon from the Filters pane in the Criteria tab.
5. Select the data element used to create the dashboard prompt. The New Filter popup appears.



**Figure 274: Filter Icon Drop-Down Menu**

Note: If the data element is not listed in the Selected Columns pane, it will not appear in the drop-down menu. Use More Columns to access a full list of data elements in the Subject Areas pane.



**Figure 275: Operator Drop-Down Menu With Is Prompted Option**

6. Navigate to the Operator drop-down menu from the New Filter popup.
7. Select **Is Prompted**.

Note: Users should repeat this step for each data element in each report impacted by a dashboard prompt.

8. Select **OK** to close the popup.
9. Select **Save** icon to save changes to the report. The changes are saved.

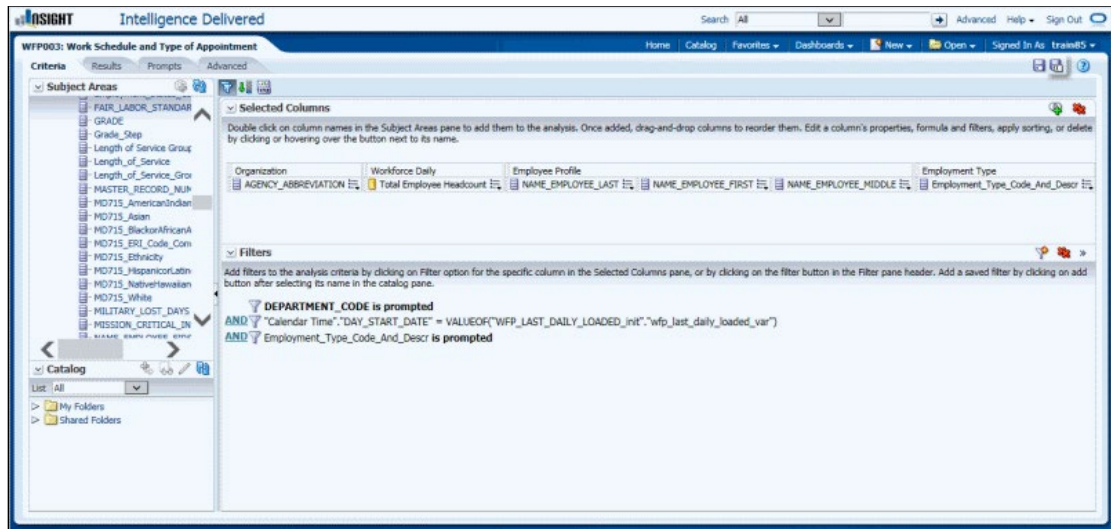


Figure 276: Save As for Work Schedule and Type of Appointment

## Creating Filters

Filters are critical for creating accurate reports because they restrict data to a particular time frame or set of data. A filter restricts data before the report is run and each time it is run.

Filters provide the following:

- **New** action link allows users to create a **Filter** independently from a report or dashboard.
- Filters that are applied to a report are listed in the filters pane within the **Criteria** tab.
- Commonly Used Operators:
  - **Is equal to/is in:** Filter for a specific value  
Application: Department, Agency, Pay Period, year
  - **Is between:** Filter between two values  
Application: Dates
  - **Is prompted:** Connects prompts between reports  
Application: Managerial reports, dashboards



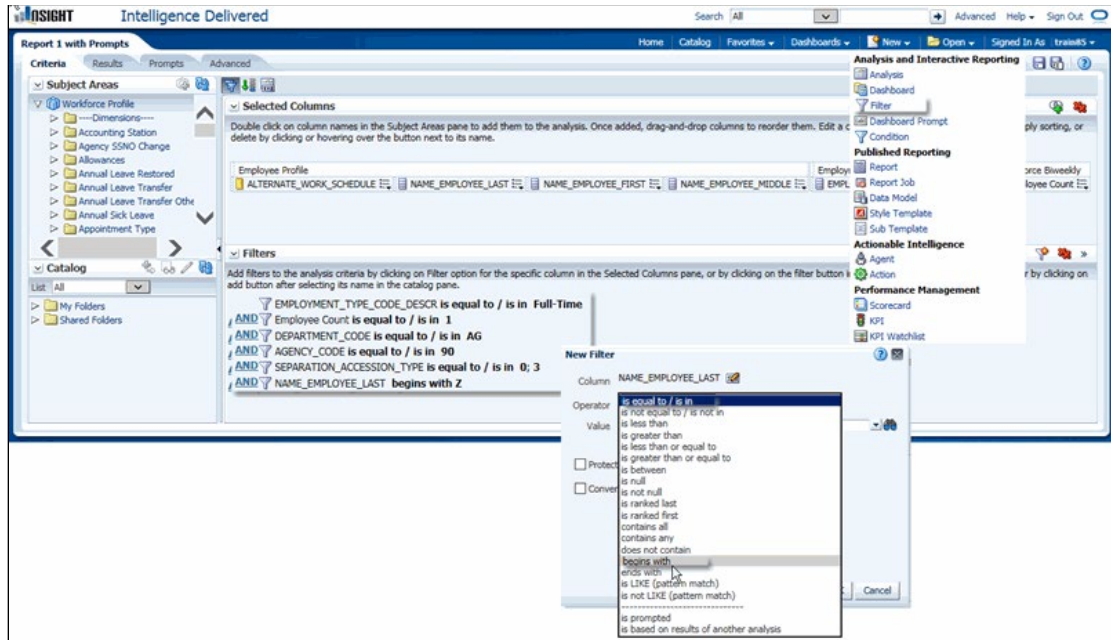


Figure 277: Creating Filters

### To Create Filters:

1. Use the **Filters** pane in the **Criteria** tab of the **ad hoc report editing** page to create new filters and view a vertical list of all filters applied to a report.

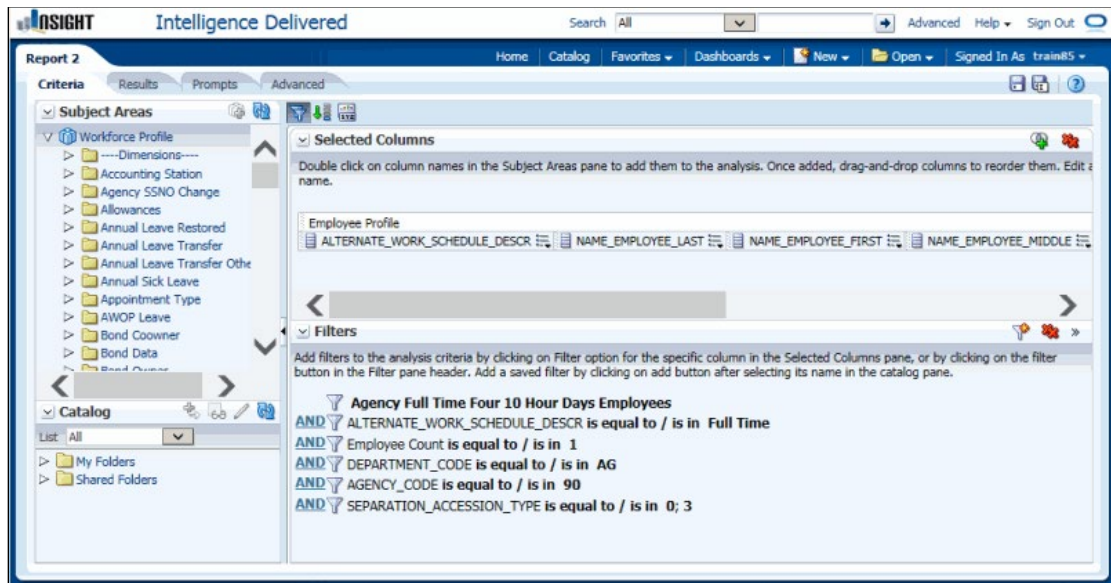


Figure 278: Criteria Tab With Filters Pane

2. Select **Filter** icon from the **Filters** pane



OR

Select the targeted data element.

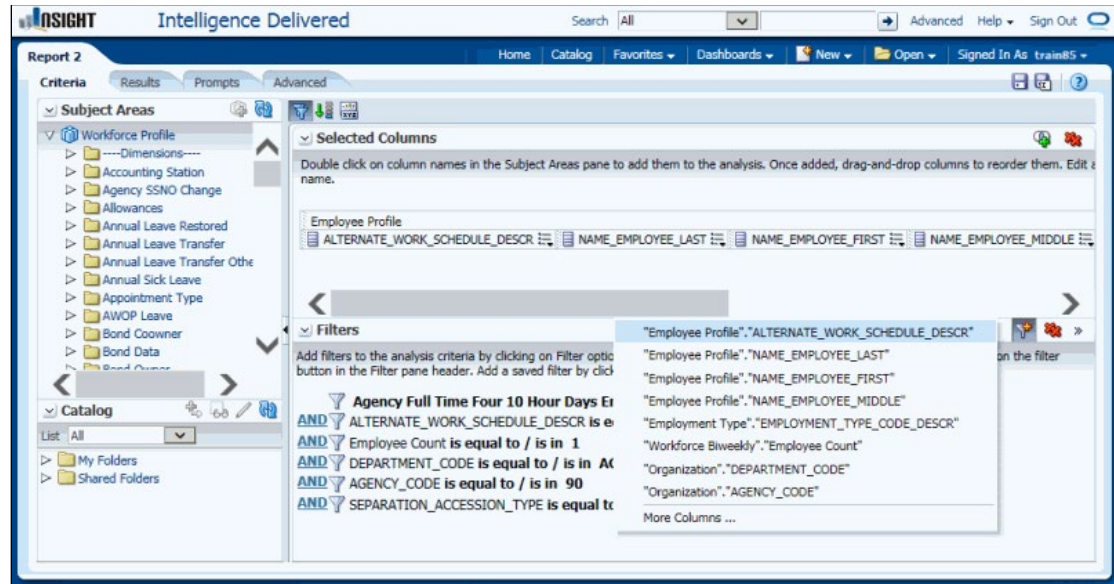


Figure 279: Filter Icon Drop-Down Menu

Note: By selecting More Columns, the user can create a new filter on a data element that has not been identified as a report column.

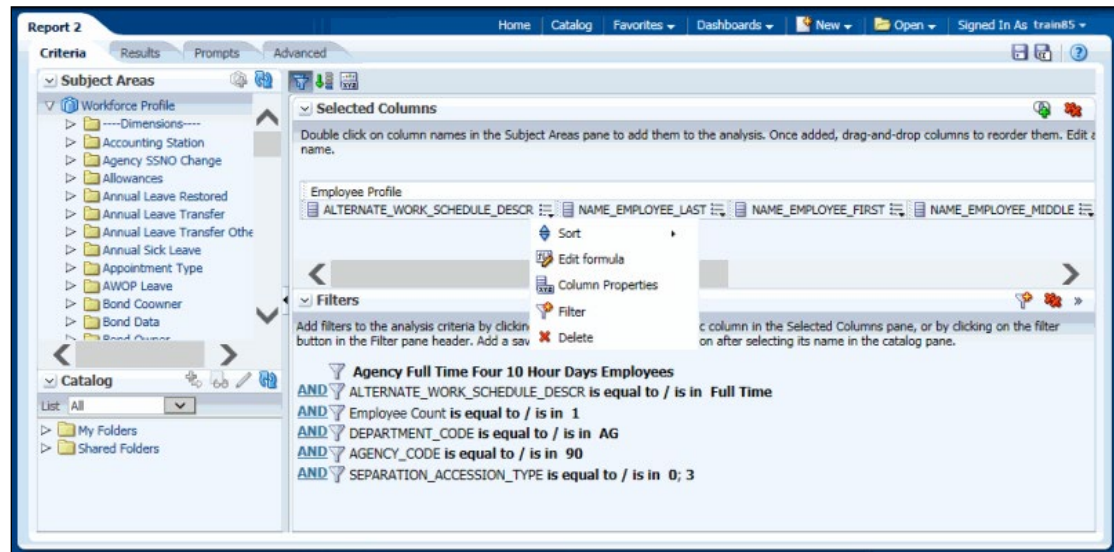





Figure 280: Data Element Edit Icon Drop-Down Menu (Select Filter)

Icon Name	Definition	Icon
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<b>Filter</b>	Restricts data to certain fields before the report runs.	
<b>Remove all Filters</b>	Allow users to remove all existing filters	
<b>More Options</b>	Allows users to save a group of filters as an independent item in the Catalog.	

- View the **New Filter** popup to customize how the filter restricts data in the report. Valid values are:
  - Column:** References that data element selected for the new filter.
  - Operator:** Allows users to choose the type of restriction applied to the report (e.g., is equal to, is greater than).
  - Value:** Allows users to identify the values to be restricted by the filter.
  - Protect Filter:** Prevents the filter from being overridden by other filters or prompts applied to the report.

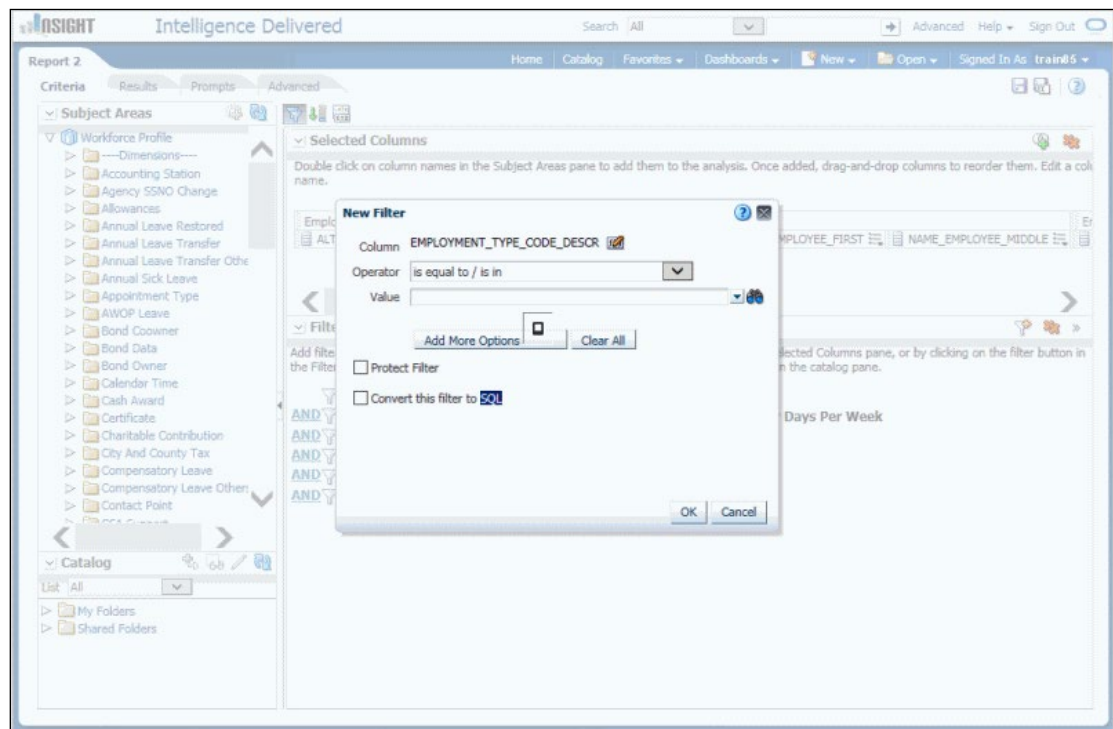


Figure 281: New Filter

- Select **OK** to apply updates to the filter. The new filter will list vertically in the **Filters** pane.

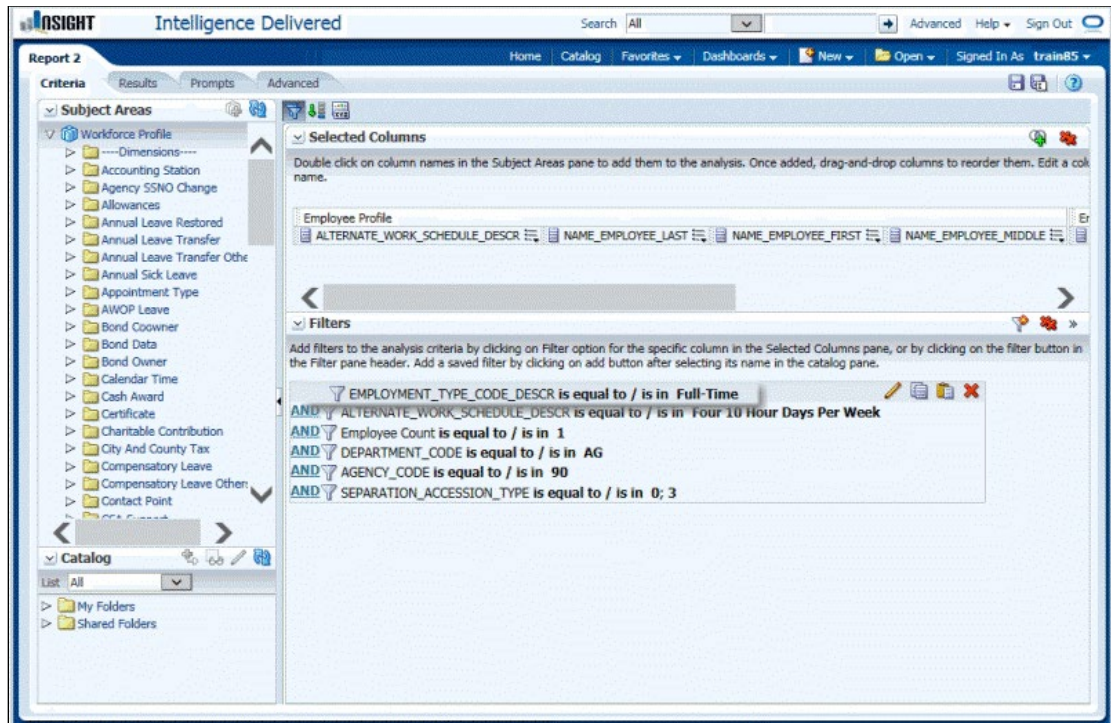


Figure 282: Filters Pane With New Filter

When there are multiple filters applied to one report, by default the filters have an "AND" relationship.

5. Select the **AND** action link to change the relationship to "OR".

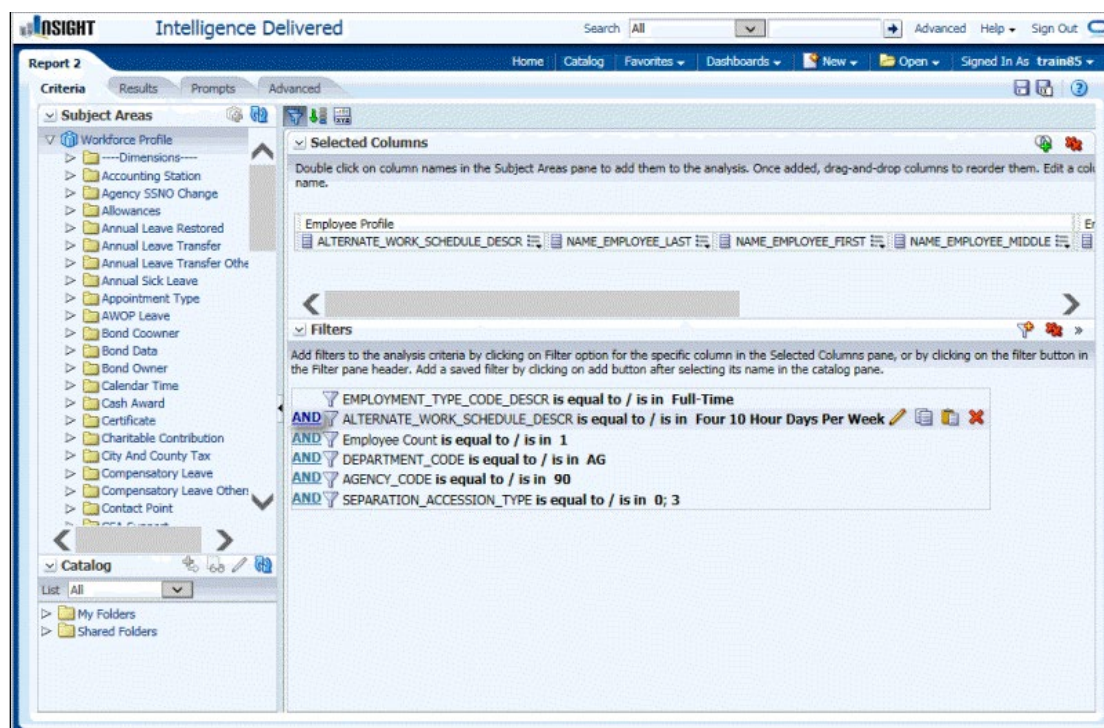






Figure 283: Filters Pane With Logic Functionality

Icon Name	Definition	Icon
<b>Edit Filter</b>	Customizes the structure and/or styles of a report component (e.g., Title, Graph, Table) within the Results tab.	
<b>Copy Filter</b>	Copies a data element, report component, or dashboard component.	
<b>Paste Filter</b>	Pastes a data element, report component, or dashboard component.	
<b>Delete</b>	Deletes a data element, report component, or dashboard component.	

## Adding Filters

Filters are critical when creating ad hoc reports as they restrict data in a report. Create customized filters to fit specific needs when designing an ad hoc report.

Ways to create a filter:



- Sort or edit formula column properties such as formatting and creating filters.
- Select the data that appears in the report by adding a filter. Valid values are:

Icon Name	Definition	Icon
Filter	Restricts data to certain fields before the report runs.	
Remove all Filters	Allows users to remove all existing filters	
More Options	Allows users to save a group of filters as an independent item in the Catalog.	

#### To Edit or Filter a Data Element:

1. Select **Edit** icon on a data element in the Selected Columns pane.

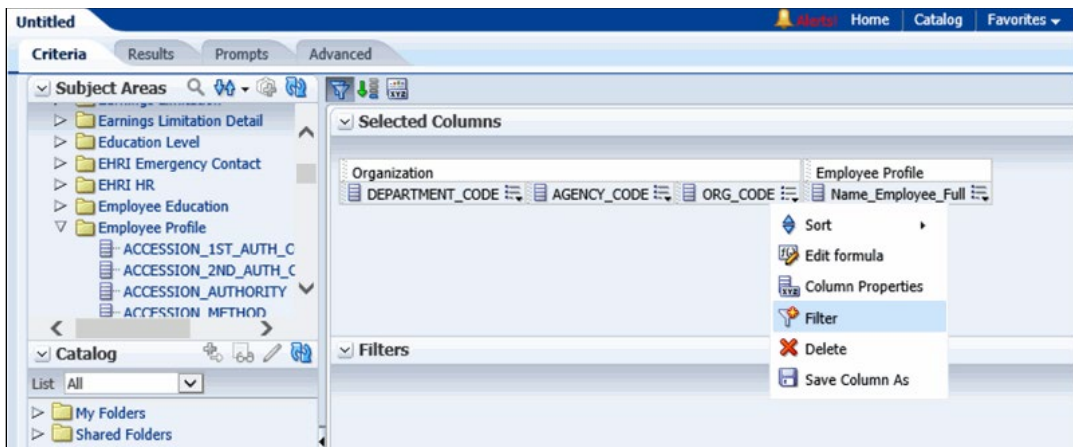
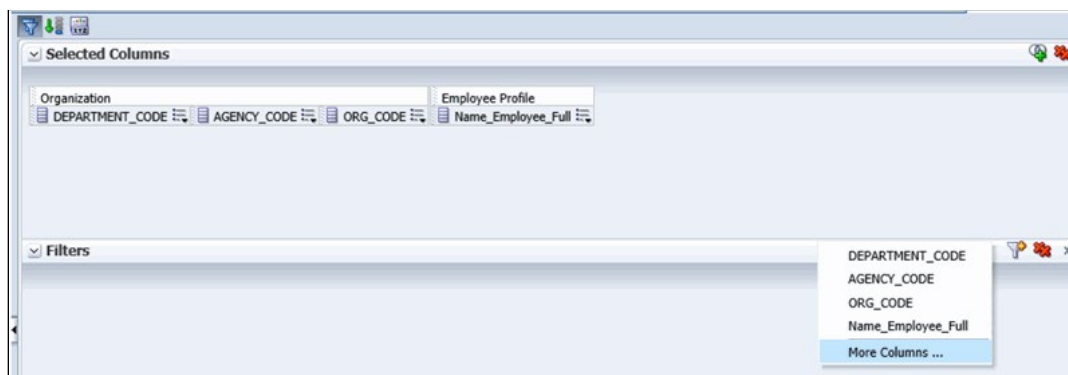


Figure 284: Filter Option Using the Edit Icon from Data Element

OR

Select **Filter** icon to add filters in the Filter pane.

2. Select **More Columns** to filter data elements that are not already present in the report.



**Figure 285: Filter Icon, More Columns**

For additional information about data elements, use the Insight Data Dictionary for definitions and folder locations. For the most current version of the Data Dictionary go to the Insight website located on the NFC Home page,

[https://www.nfc.usda.gov/ClientServices/HR\\_Payroll/Initiatives/Insight/Resource\\_Materials.php](https://www.nfc.usda.gov/ClientServices/HR_Payroll/Initiatives/Insight/Resource_Materials.php).

Note: For all Insight WFP ad hoc reports, users must filter SEPARATION\_ACCESSION\_TYPE to pull data only about active employees. To do this, users should filter SEPARATION\_ACCESSION\_TYPE is equal to / is in 0;3.

## Adding a Calendar Filter

### To Add a Calendar Filter:

1. Select **Filter** icon from the **Filters** pane.
2. Select the targeted data element.

**OR**

Select **More Columns**.





The Select Column popup appears.

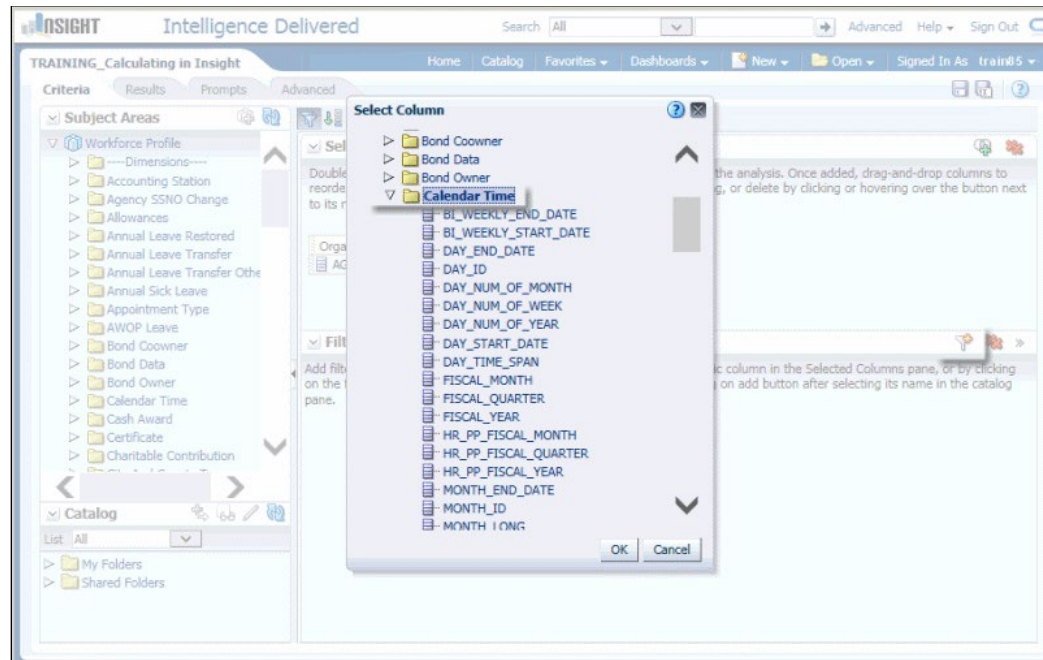


Figure 286: Filter Pane and Filters Icon for Applying Calendar Filter

3. Select the targeted data element form the Select Column popup.

The New Filter popup appears.

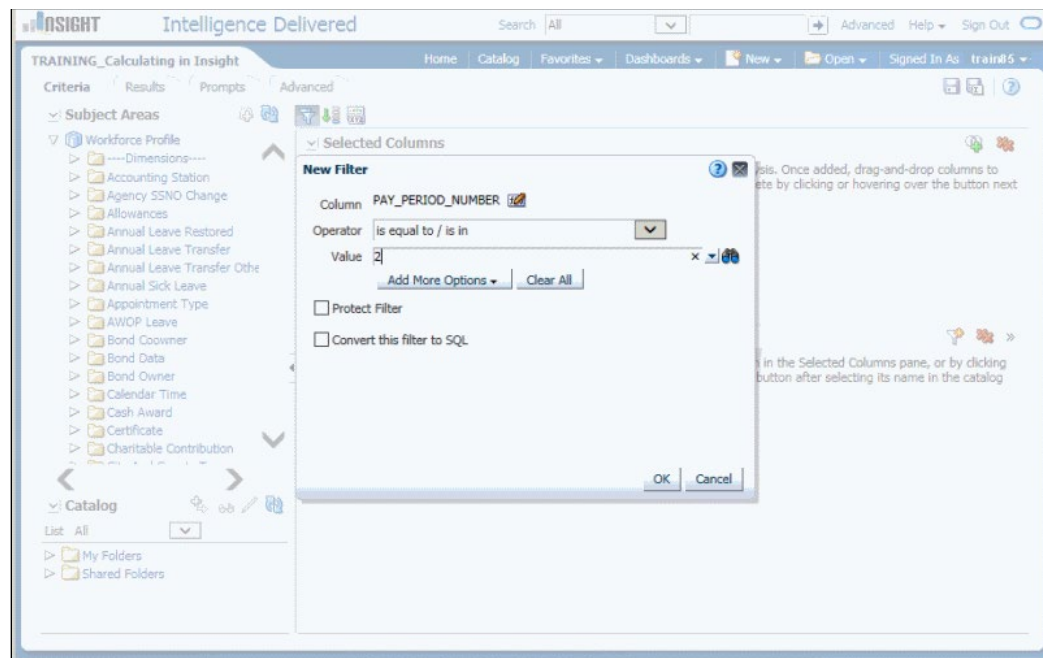


Figure 287: New Filter Popup With Value Field





This popup contains options to customize how the filter restricts data in the report using operator and value specifications.

4. Select an option from the Operator drop-down menu.
5. Type or select the desired value into the Value field.
6. Select **OK** to apply updates to the filter.

The new filter will list vertically in the **Filters** pane.

7. Select **Save As** icon to save the report.

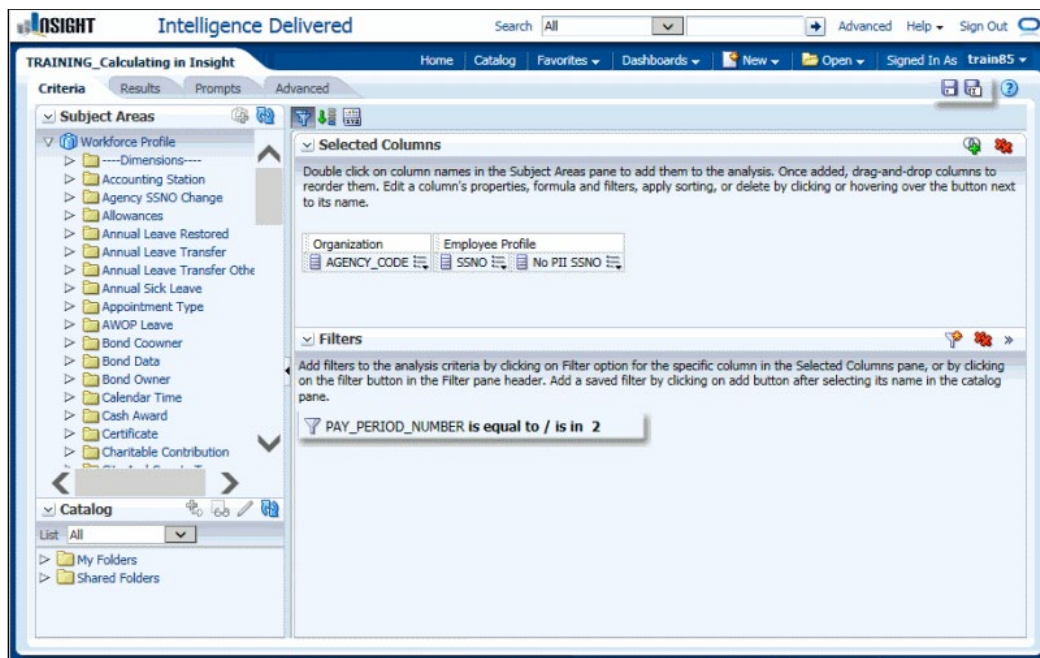


Figure 288: Save and Save As Icon for the New Filter in the Filters Pane

8. Select the **Results** tab to view the result of the report.

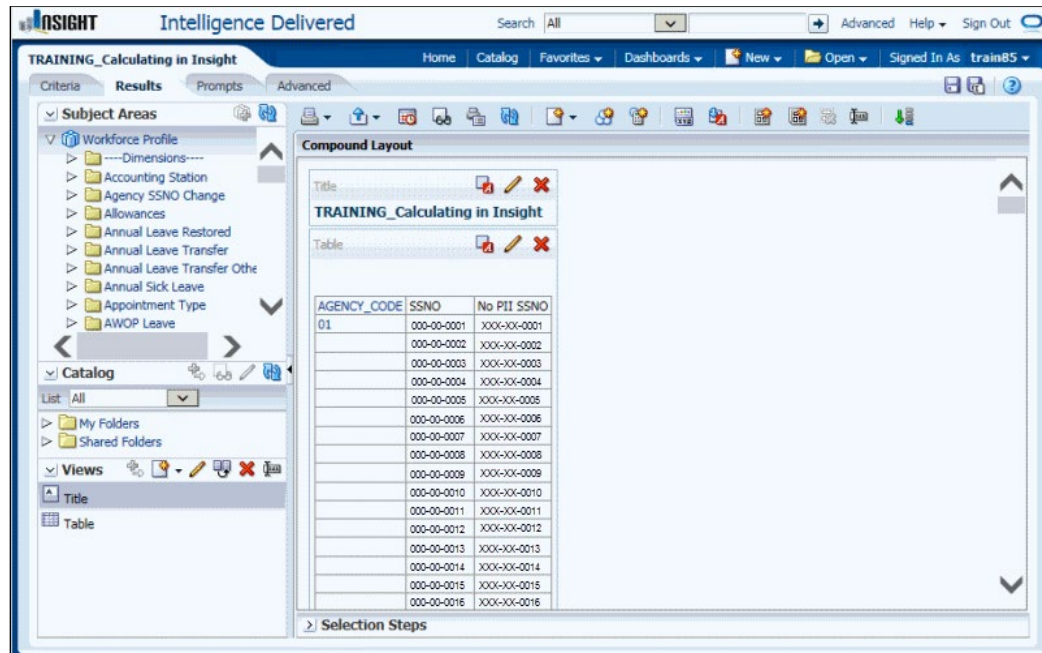


Figure 289: Applying Calendar Filters

## Creating Calendar Filters to Restrict Data to the Most Recent Pay Period and Year

To Create a Calendar Filter to Restrict Data to the Most Recent Pay Period and Year:

1. Select **Filter** icon from the Filters pane.
2. Select the targeted data element.



OR

Select **More Columns**.

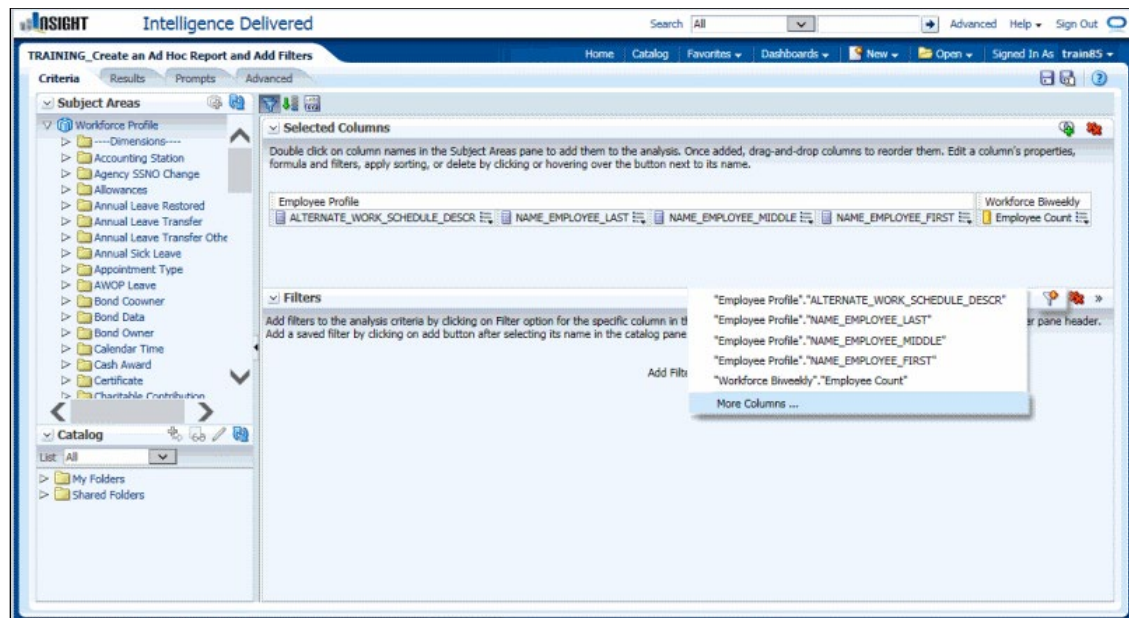


Figure 290: Filters Pane With Filters Icon

The Selected Column popup appears.

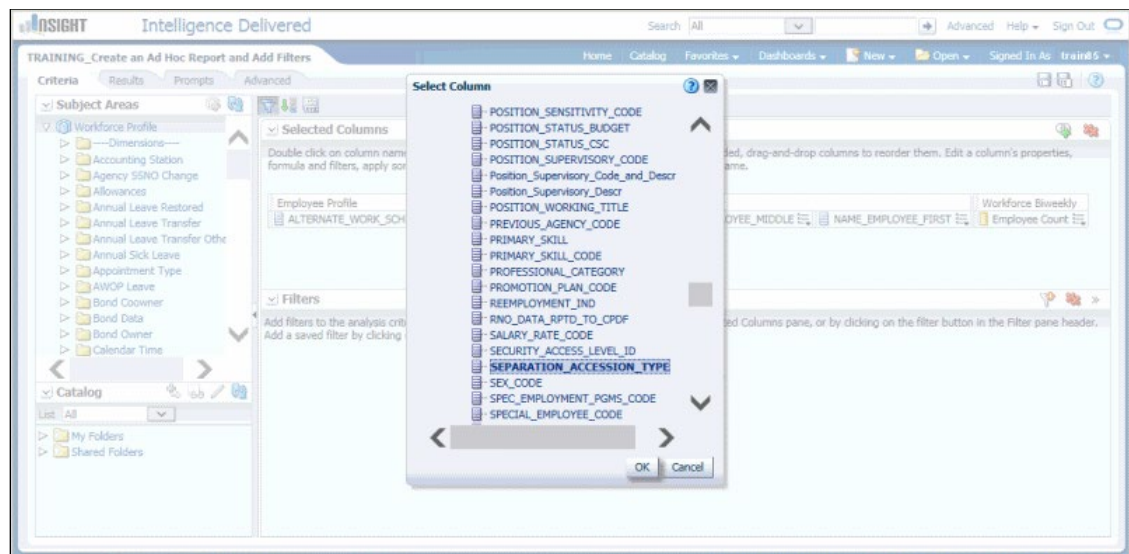


Figure 291: Select Column Window

3. Select the targeted data element from the Select Column popup.
4. The New Filter popup is displayed.



This popup contains options to customize how the filter restricts data in the report using operator and value specifications.

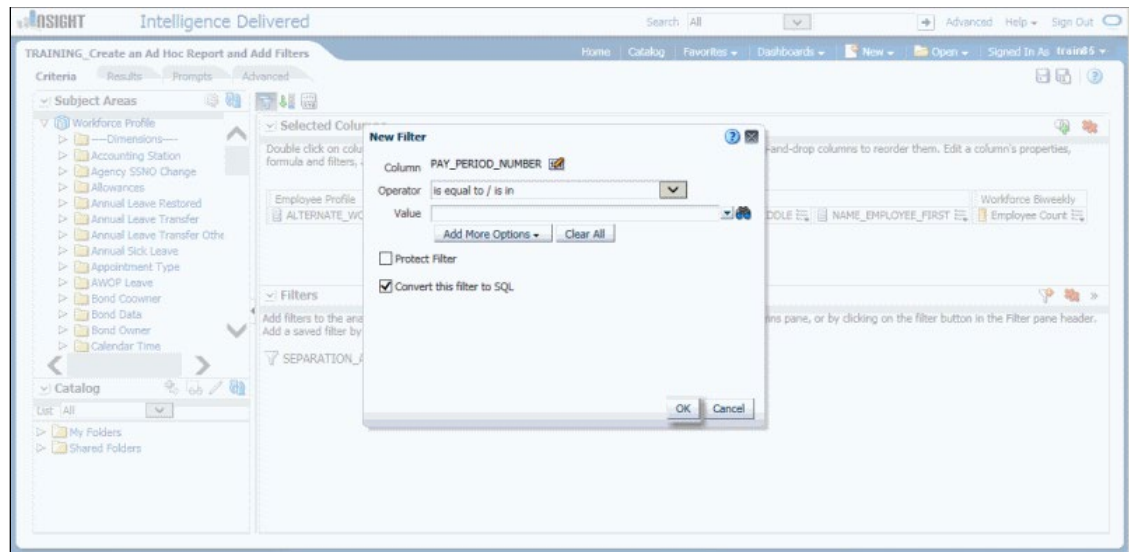


Figure 292: New Filter Popup

5. Select **Convert Filter to SQL** checkbox.
6. Select **OK** to close the popup.
7. Type the SQL code that pulls the most recent biweekly load.

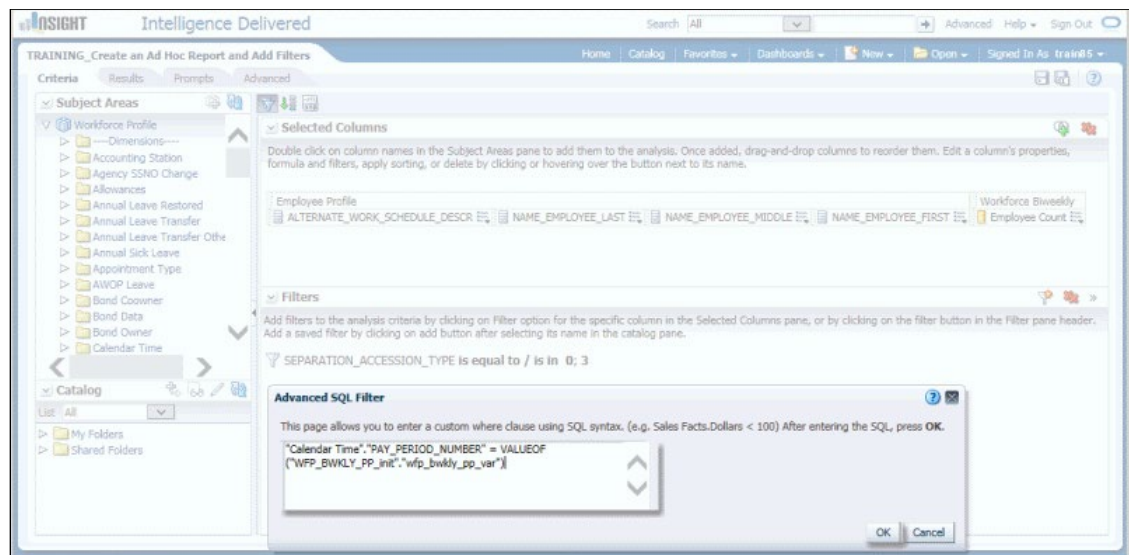


Figure 293: Advanced SQL Filter Window With SQL Code

8. Select **OK** to apply updates to the filter.
9. The new filter will be listed vertically in the **Filters** pane.



10. Select **Save As** icon to save the report.

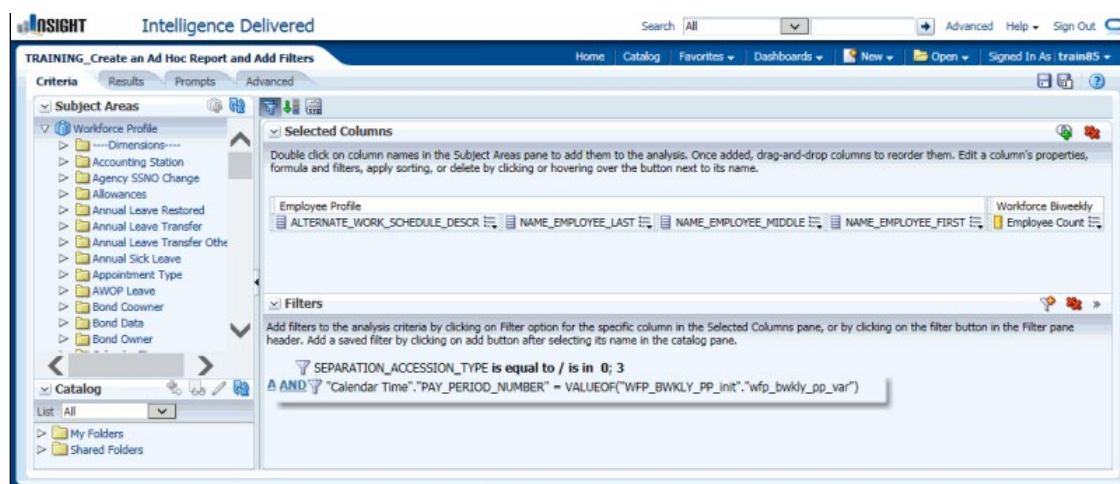


Figure 294: New Filter Added to the Filters Pane (Pay Period Number)

11. Navigate to the **Results** tab to view the result of the report.

## Saving a Group of Filters

### To Save a Group of Filters:

1. Select **More Options** icon from the Filters pane within the *ad hoc report editing* page. The Filters options are displayed.



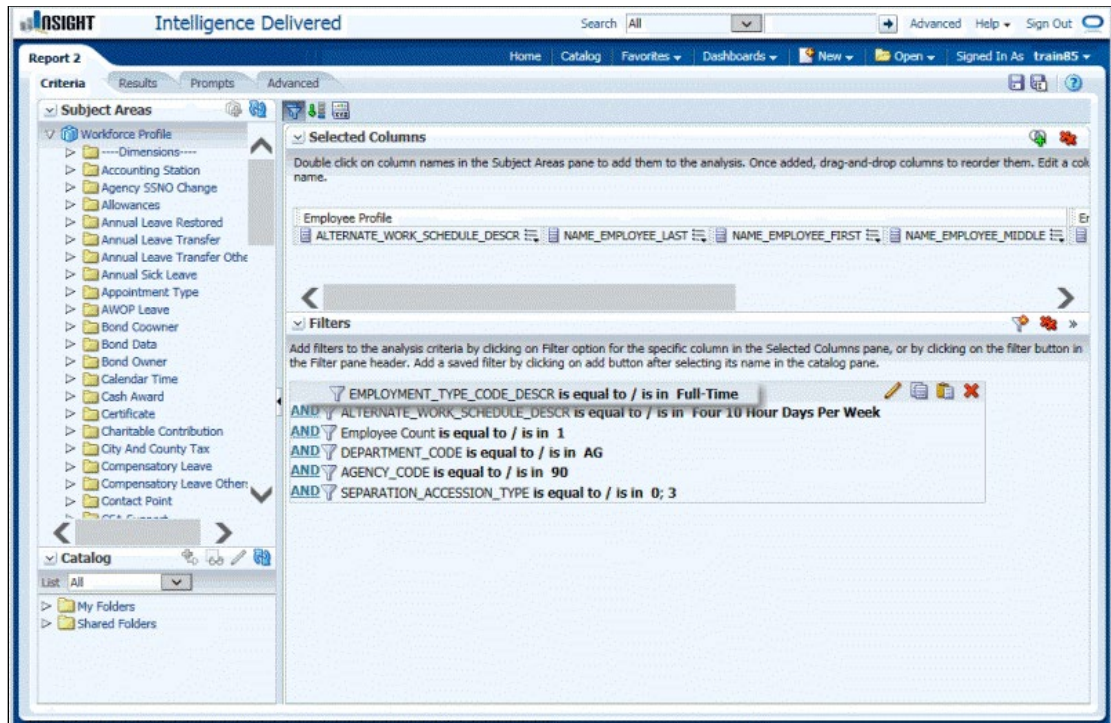


Figure 295: Filters Pane With New Filter

Icon Name	Definition	Icon
<b>More Options</b>	Allows users to save a group of filters as an independent item in the Catalog.	

2. Select **Save Filters** from the menu of options.



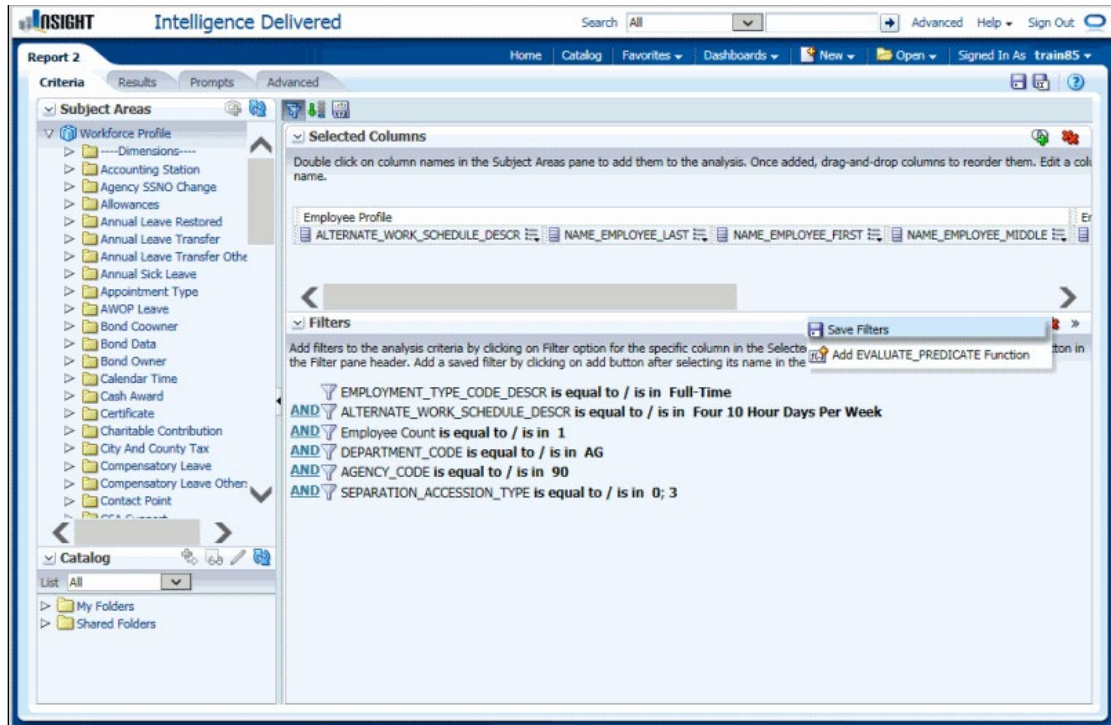


Figure 296: Save Filters Option

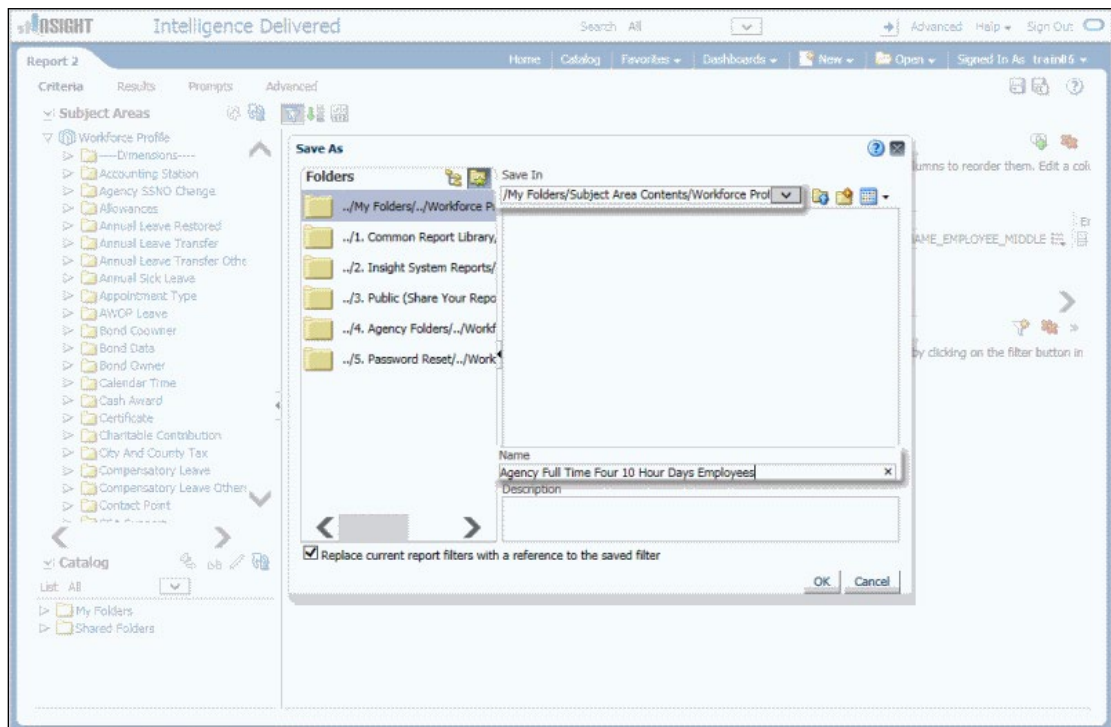


Figure 297: Filter Save As Window

3. Type the name of the filter to be saved in the Name field on the Save As popup.



Note: By default, Insight will recommend the user saves the filter within a folder with the title of the Subject Area from which the item was created (e.g., WFP). Users should comply with this recommended location in order to use the filter in future reports.

4. A checkbox at the bottom of the Save As popup allows the user to replace the current list of filters with a grouped filter referenced by the saved name. Uncheck this box in order to maintain the ability to edit filters individually.

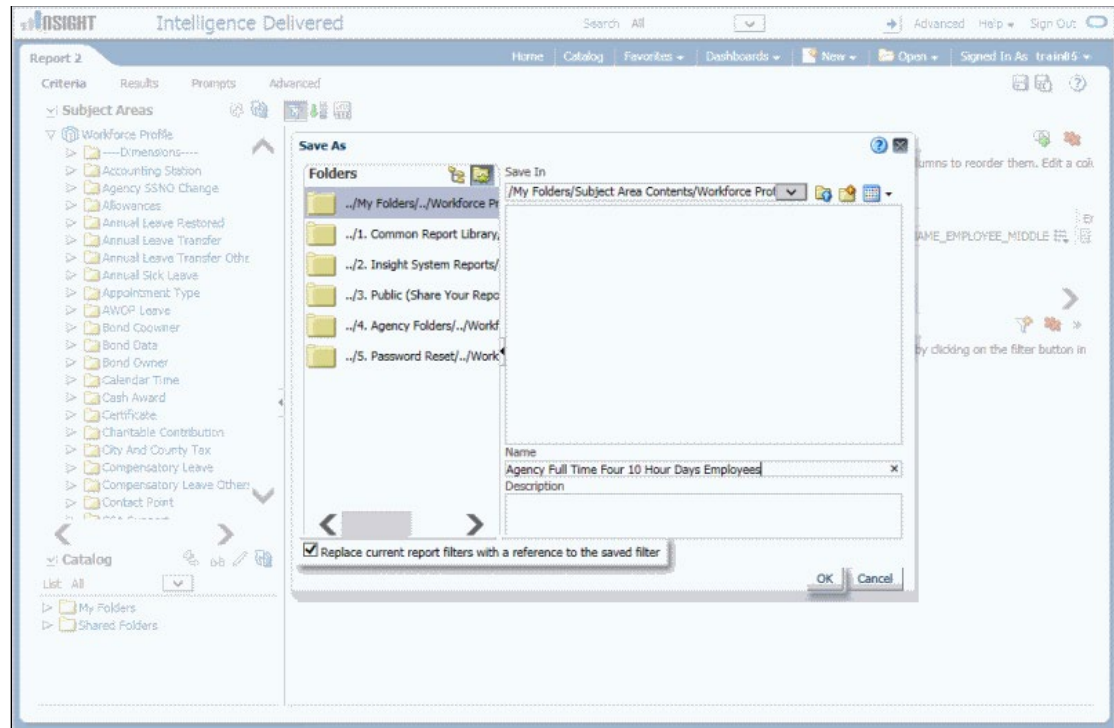


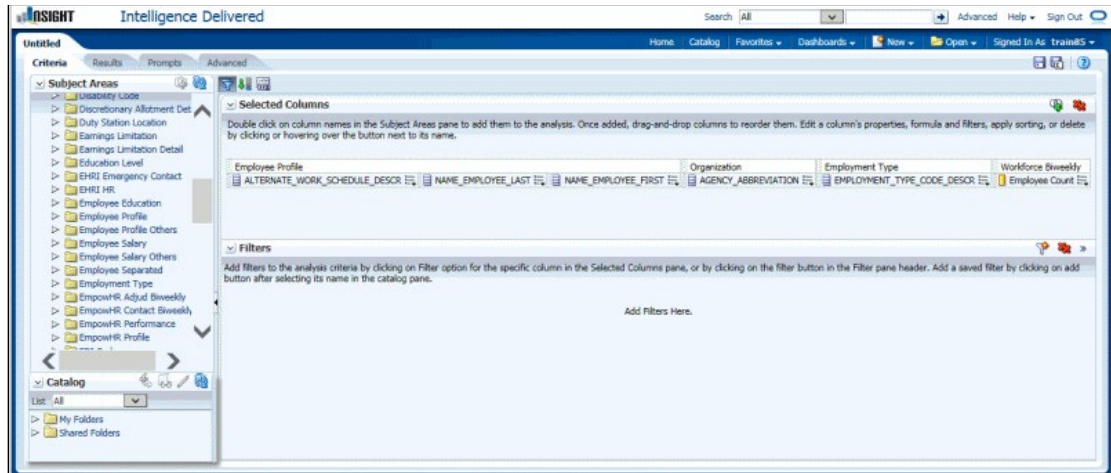
Figure 298: Replace Current Report Filters With a Reference to the Save Filter Checkbox

5. Select **OK**. The filter is saved.

## Applying a Saved Filter to a Report

### To Apply a Saved Filter to a Report:

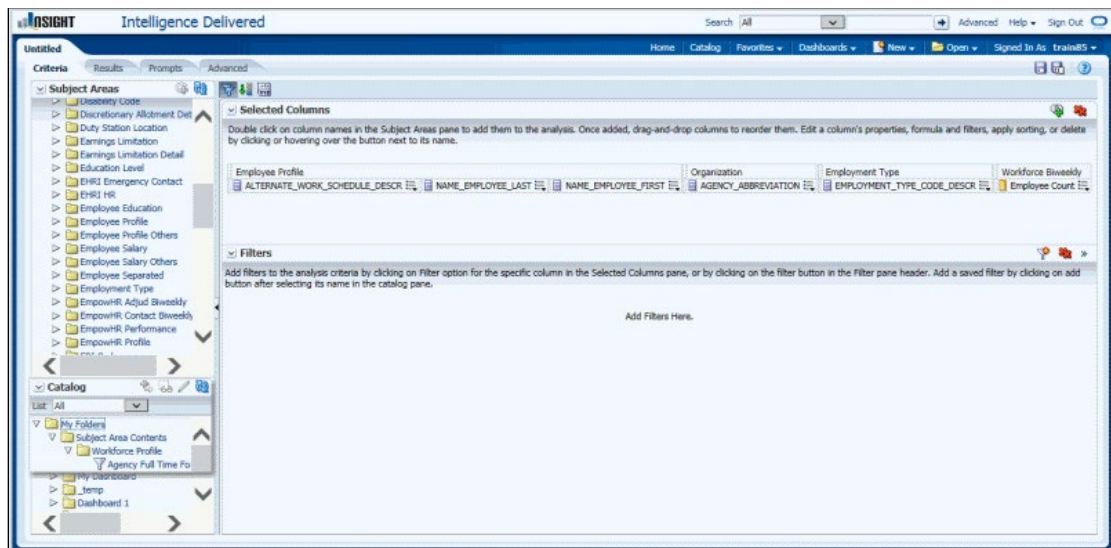
1. Navigate to the Catalog pane from the Criteria tab of the ad hoc report editing pane.



**Figure 299: Criteria Tab With Catalog Pane**

Note: When applying a saved filter to a new or existing report, the filter and report must be from the same Subject Area.

2. Navigate to the saved filter from the Catalog pane of the ad hoc report editing page
3. Double-click the filter name.



**Figure 300: Saved Filters From the Catalog Pane**



Note: Users can apply filters to a report even if the data element is not included within the **Selected Columns** pane. This acts the same as if the user were to select **More Columns** when creating a new filter.

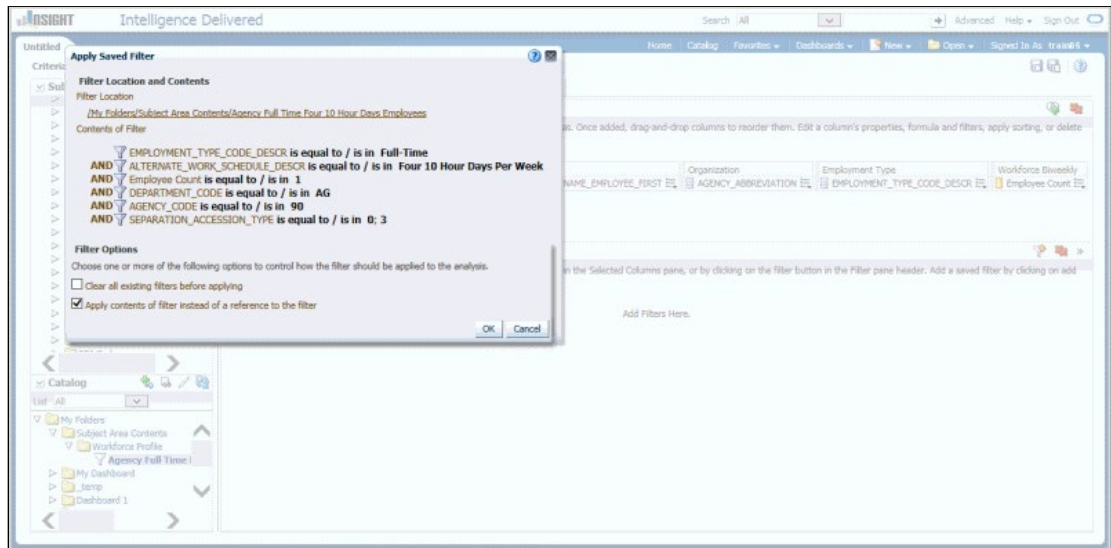


Figure 301: Apply Saved Filter Window With Filter Options

4. Use the **Filters** Options within Apply Saved Filter popup to customize how the filter appears within the report.
5. Clear all existing filters before applying: Removes all other filters currently listed within the **Filters** pane.
6. Apply contents of filter instead of a reference to the filter: Allows the user to choose whether to control all future updates to the filter in this report, or for the filter to update automatically in this report when it is changed in its source location.

## Creating Filters to Restrict Data

### To Create Filters to Restrict Data:

1. Select the **Filter** icon from the Filters pane.
2. Select **More Columns** in the drop-down menu.



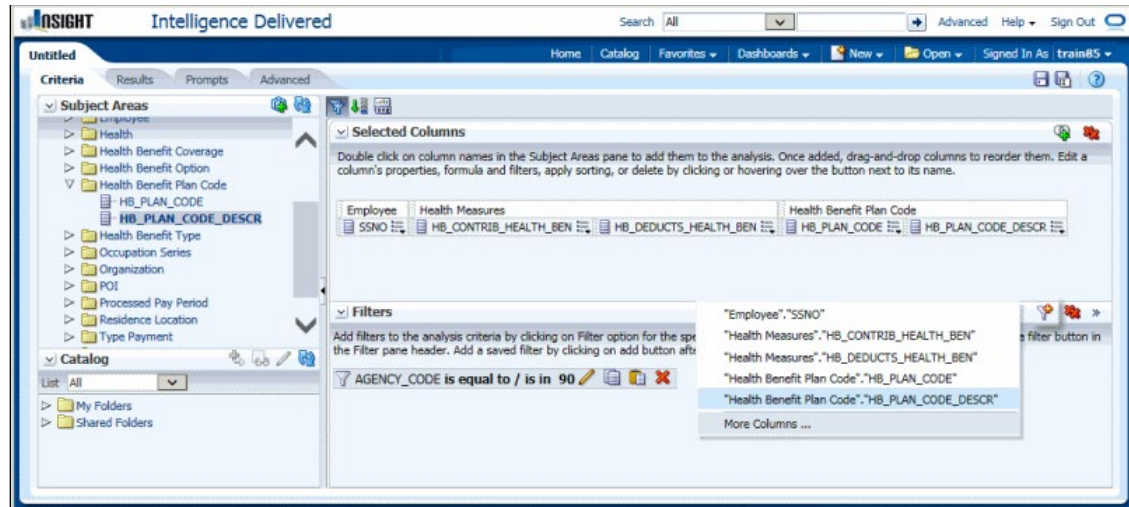


Figure 302: Filter Icon Menu of Options With More Columns Window to Restrict Data

3. Select the targeted data elements from the Select Column pane.

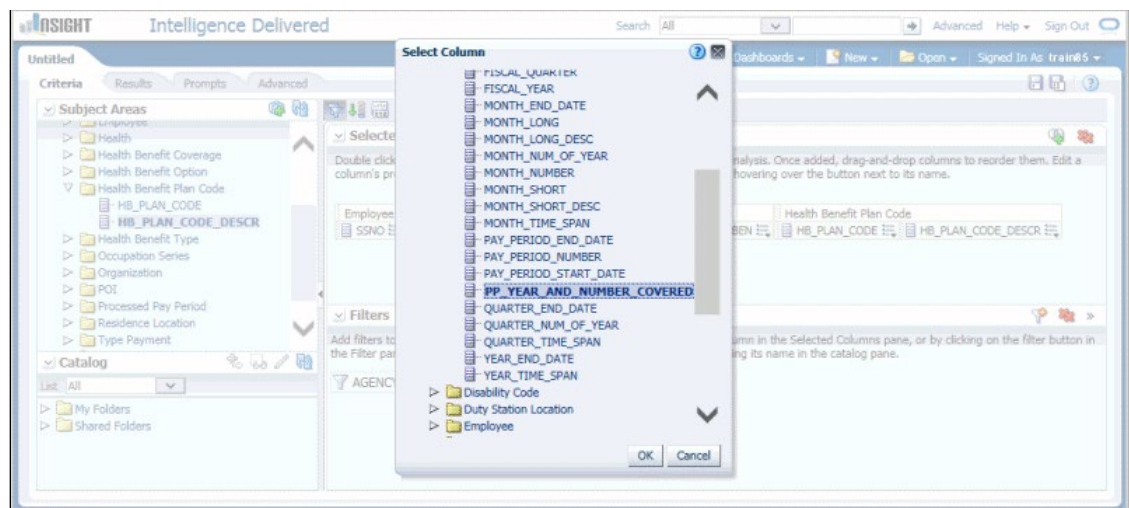


Figure 303: Select Data Elements in the Select Column Window

4. Select an option from the Select Column drop-down menu.
5. Select the **OK** button to apply updates to the filter. The new filter will list vertically in the Filters pane.

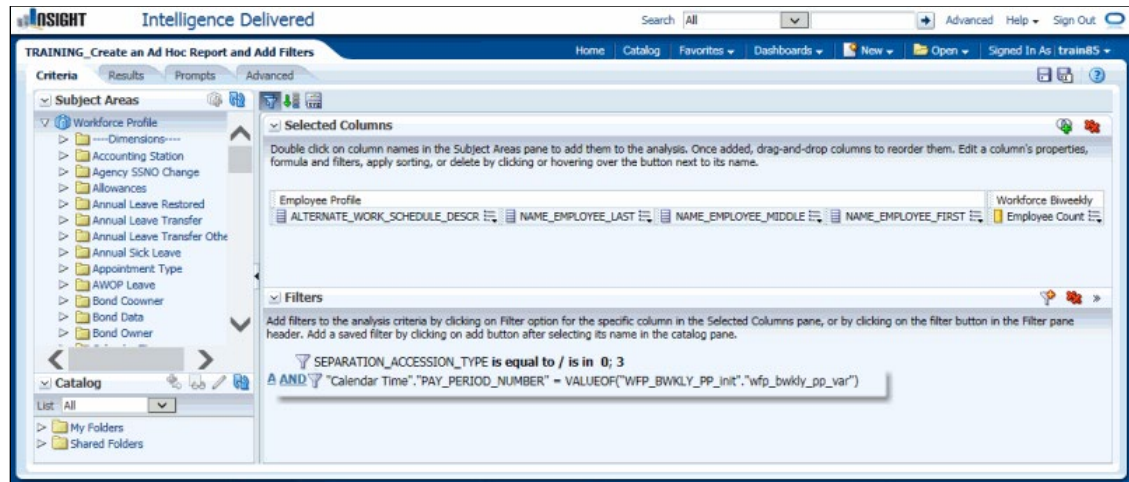


Figure 304: New Filter Added to the Filters Pane

## Filters Record View

### To Use the Filters Record View:

1. Select the **Results** tab. The Results tab is displayed.
2. Select the **Views** pane on the Results tab.
3. Select **Filters** from the New View menu options in the Views pane.



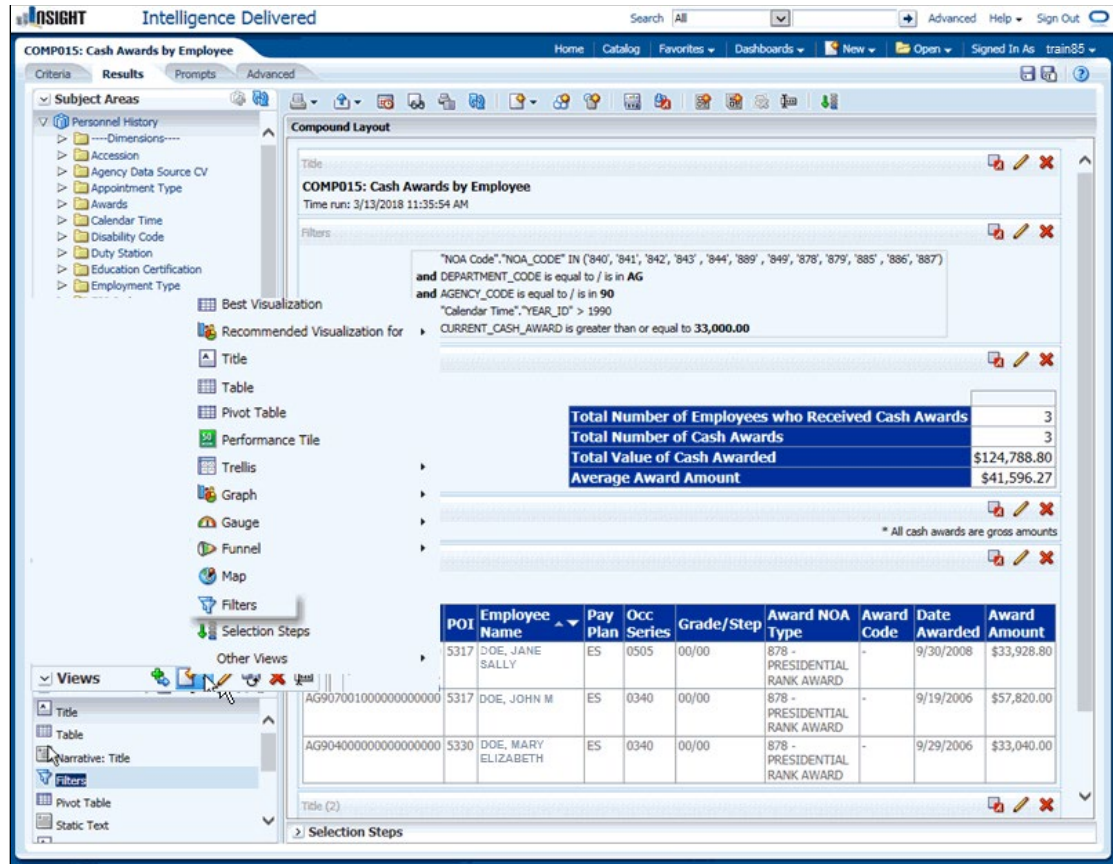


Figure 305: New View Options

- View the **Filters** record component of the report. The **Filters** record will create a vertical list of all filters applied to the report.

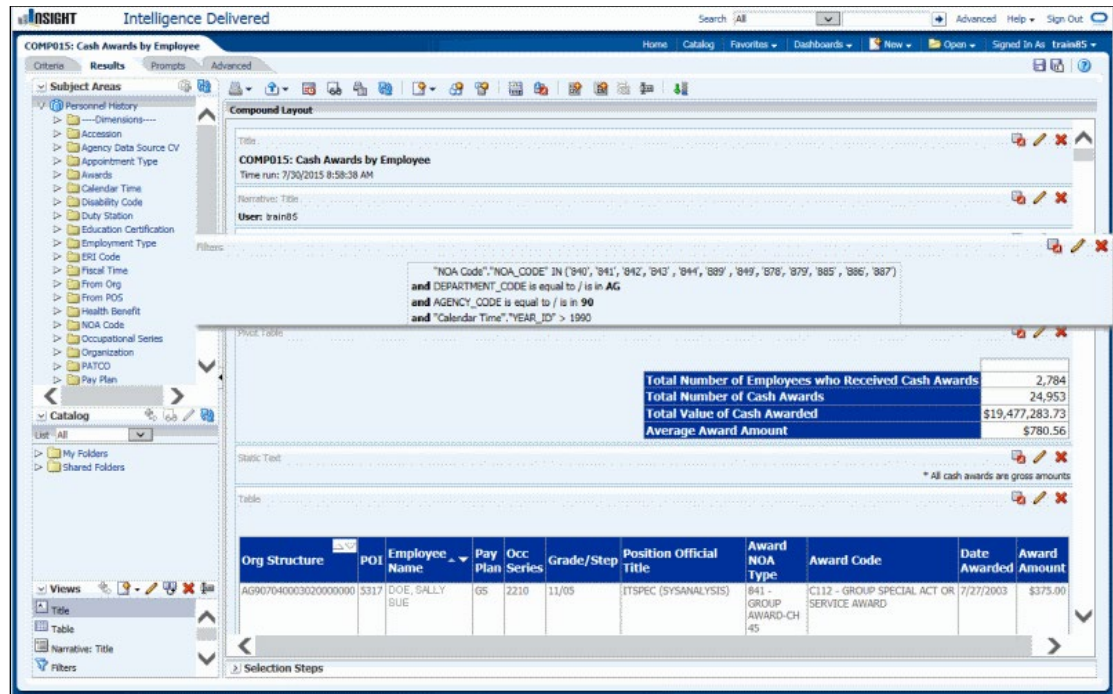


Figure 306: Filters Record

Note: The **Filters** record will update based on the filters included in the report as well as any prompt selections made at the time the report runs.



## Joins (Unions and Intersections)

This section will review Insight's union and intersection functionality which can be used to create an analysis that combines data from multiple analyses - in one Subject Area or across multiple Subject Areas.

Two methods to create joins in Insight are:

- SQL Set Operators
- Custom joins via written SQL (SQL Programming)

### Purpose of Unions

A Union joins two or more analyses from different Subject Areas in a single report. This has many practical applications for report building in Insight.

Below are examples of using Unions in Insight.

Purpose of Report	Components of Report
Impending Not-to-Exceed (NTE) dates for Personnel Actions.	Union of three Workforce Profile reports <ul style="list-style-type: none"> <li>• Non-null Non-Pay NTE Dates</li> <li>• Non-null Appointment NTE Dates</li> <li>• Non-null Promotion NTE Dates</li> </ul>
Listing of employee contributions to Health, Life, and Flex Funds by plan code.	Union of PACS Health, PACS Life Insurance, and PACS Flex Funds reports <ul style="list-style-type: none"> <li>• PACS Health</li> <li>• PACS Life</li> <li>• PACS Flex Funds</li> </ul>
Listing of time charged to Annual Leave in a pay period along with Annual Leave balances at the end of the pay period.	Union of PACS Leave and PACS App Charge reports <ul style="list-style-type: none"> <li>• PACS App Charge</li> <li>• PACS Leave</li> </ul>

### Purpose of Intersections

An Intersection joins two or more sets of data in a single report, with a commonality (such as SSNO) between the two reports. Below is an example of using intersections in Insight.



<b>Purpose of Report</b>	<b>Components of Report</b>
Attrition calculations showing employees hired between 1994 and 2013 who are still active employees at Agency.	Intersection of Workforce Profile and Personnel History reports on SSNO: <ul style="list-style-type: none"><li>• WFP - Listings of active employees</li><li>• PERHIS - Listings of all employees hired via 100 series NOAC</li></ul>
Employees who contributed to both Health and Life insurance plans in the same pay period.	Intersection of PACS Health and PACS Life Insurance report: <ul style="list-style-type: none"><li>• Health - Listings of employees who contributed to a given Health Plan</li><li>• Life - Listings of employees who contributed to a given Life Insurance Plan</li></ul>



## Analysis and Views

An analysis is comprised of one or more Views. Create multiple Views in an analysis to enhance the depiction of data.

The Views pane includes various options to display data as a:

- **Table:** Organize data in a standard table
- **Pivot Table:** Present summary data
- **Graph:** Analyze data graphically

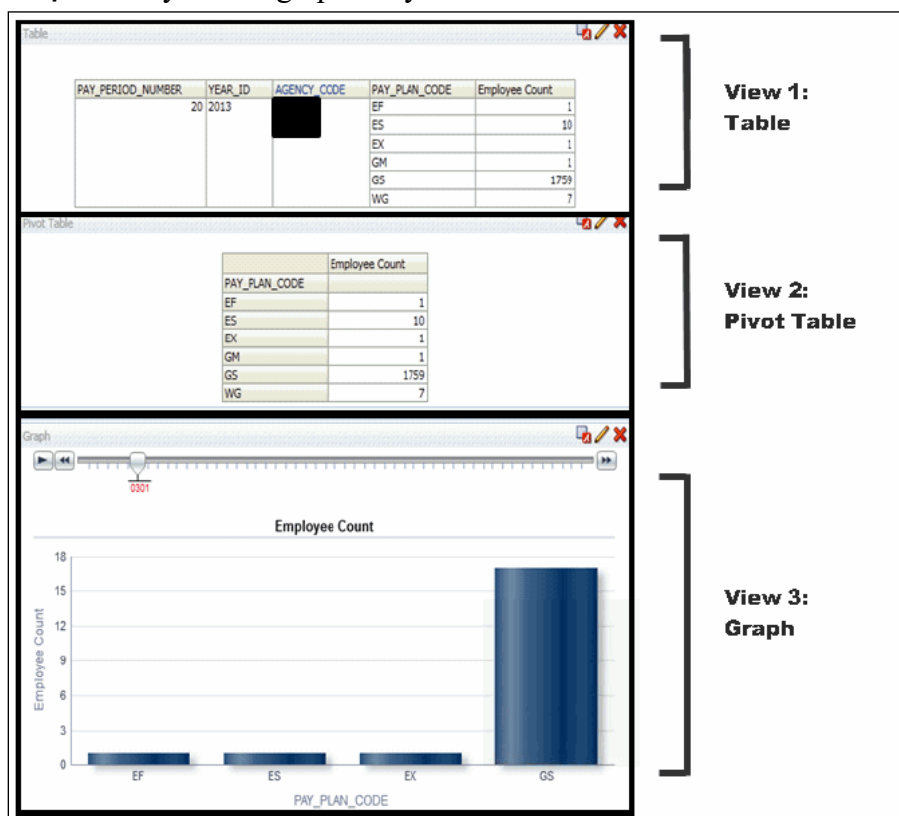


Figure 307: Views in Insight

## Static Text View

To Use the Static Text View:

1. Navigate to the **Views** pane in the **Results** tab.
2. Select **Static Text** from the **New View** menu options in the **Views** pane.

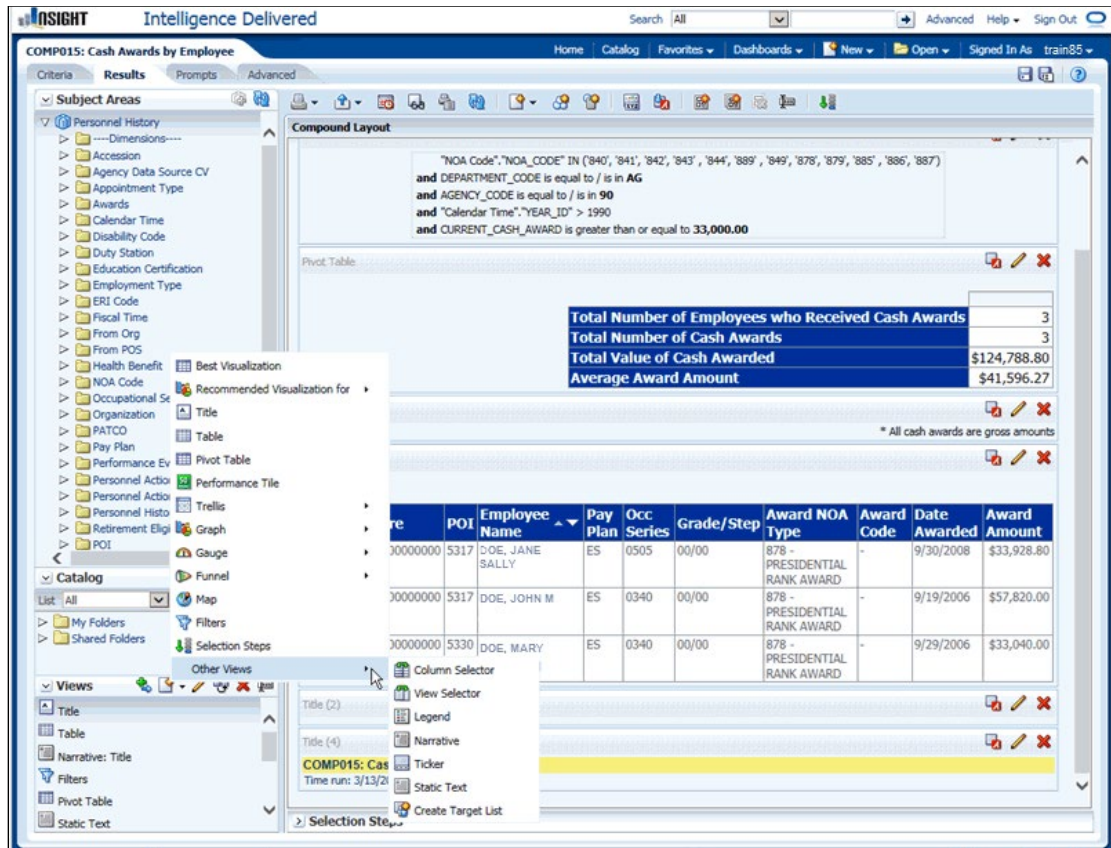


Figure 308: New View With Static Text Option

3. Locate the applicable Static Text component at the bottom of the report.
4. Select the corresponding **Edit View** icon.





INSIGHT Intelligence Delivered

COMP015: Cash Awards by Employee

Criteria Results Prompts Advanced

Subject Areas

- Personal History
  - Accession
  - Agency Data Source CV
  - Appointment Type
  - Awards
  - Calendar Time
  - Disability Code
  - Duty Station
  - Education Certification
  - Employment Type
  - ERI Code
  - Fiscal Time
  - From Org
  - From POS
  - Health Benefit
  - NOA Code
  - Occupational Series
  - Organization
  - PATCO
  - Pay Plan
  - Performance Evaluation
  - Personal Action

Compound Layout

AG901030002010000000	5317	DOE, BILLY BOB	GS	0510	11/01	SYS ACCTNT	849 - INDIV CASH AWARD NRB	C012 - INDIVIDUAL SPECIAL ACT OR SERVICE AWARD	4/29/2015	\$750.00
AG904010001000000000	5317	DOE, JANE SALLY	GS	2210	13/04	ITSPEC	849 - INDIV CASH AWARD NRB	C012 - INDIVIDUAL SPECIAL ACT OR SERVICE AWARD	5/18/2015	\$750.00
AG904010003000000000	5317	DOE, JIMMY JOHN	GS	2210	12/04	ITSPEC (SYSADMIN)	849 - INDIV CASH AWARD NRB	C012 - INDIVIDUAL SPECIAL ACT OR SERVICE AWARD	5/18/2015	\$500.00
AG907010000005000000	5317	DOE, JOHN MICHAEL	GS	0318	05/03	SECY (OA)	840 - INDIVIDUAL CASH AWARD	-	5/18/2015	\$500.00
AG901030004020000000	5317	DOE, RACHEL	GS	0343	09/04	PROG ANAL	849 - INDIV CASH AWARD NRB	C012 - INDIVIDUAL SPECIAL ACT OR SERVICE AWARD	5/18/2015	\$750.00
AG904020000000000000	5317	DUCK, DASH MAY	GS	2210	13/01	ITSPEC (APPSW)	849 - INDIV CASH AWARD NRB	C012 - INDIVIDUAL SPECIAL ACT OR SERVICE AWARD	5/18/2015	\$250.00
AG907020020000000000	5317	DUCK, DONALD	GS	0340	15/04	PROG MGR	841 - GROUP CASH AWARD	C112 - GROUP SPECIAL ACT OR SERVICE AWARD	4/17/2015	\$800.00
AG904030001000000000	5317	DUCK, PLUTO	GS	0501	13/08	FINANCL ANAL	849 - INDIV CASH AWARD NRB	C012 - INDIVIDUAL SPECIAL ACT OR SERVICE AWARD	5/18/2015	\$750.00

Static Text (2)

COMP015: Cash Awards by Employee

Static Text (2)

Selection Steps

Figure 309: Edit View Icon Within the Static Text Option

The Static Text is displayed.

- Type directly into the Static Text workspace, using bold, italics, underline, etc.

INSIGHT Intelligence Delivered

COMP015: Cash Awards by Employee

Criteria Results Prompts Advanced

Static Text:2

Editing from: "Compound Layout" Done Revert

B / u Line Break ☐ Contains HTML Markup

Static Text

Figure 310: Static View Editing Page With Formatting Features

- Select **Done**.



## Tables View

### To Use the Tables View:

1. Select **Table** from the New View icon located in the Views pane.

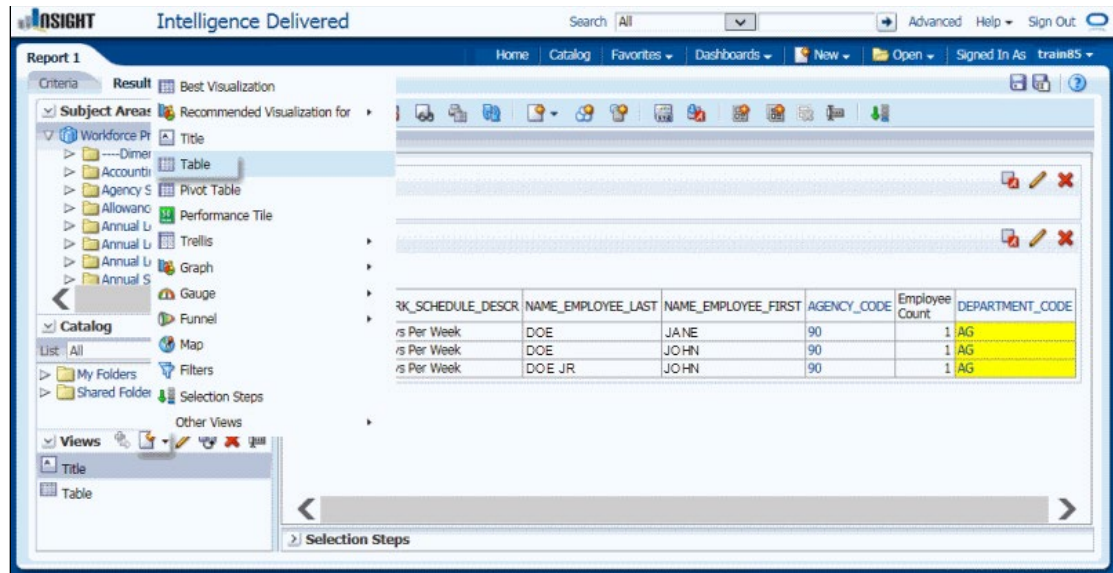


Figure 311: New View Drop-Down Menu Within the Views Pane

2. Select **Edit View** icon to open the Layout pane.

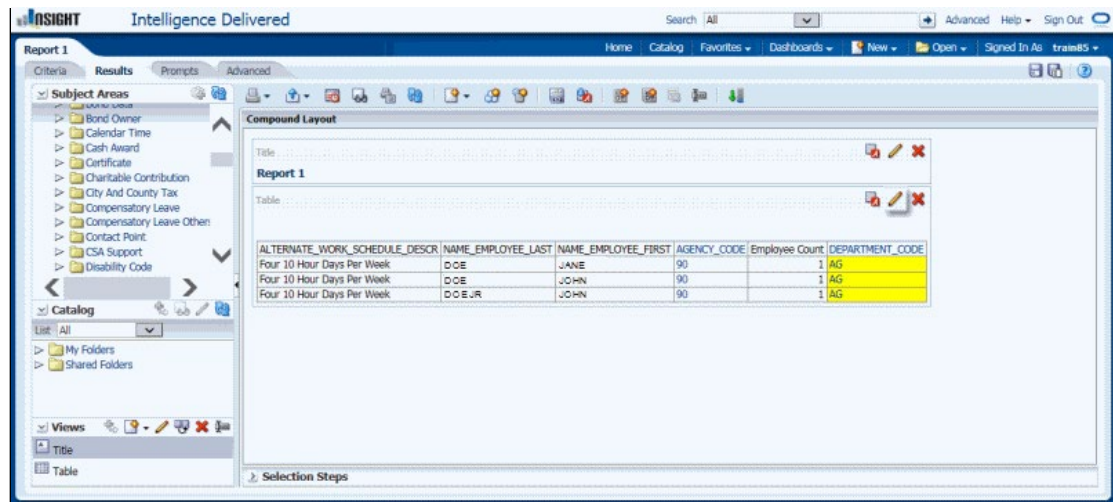


Figure 312: View Edit Icon Within the Table

3. View the **Layout** pane to manipulate how the data elements are arranged withing the table (e.g., within Table Prompts, Sections).

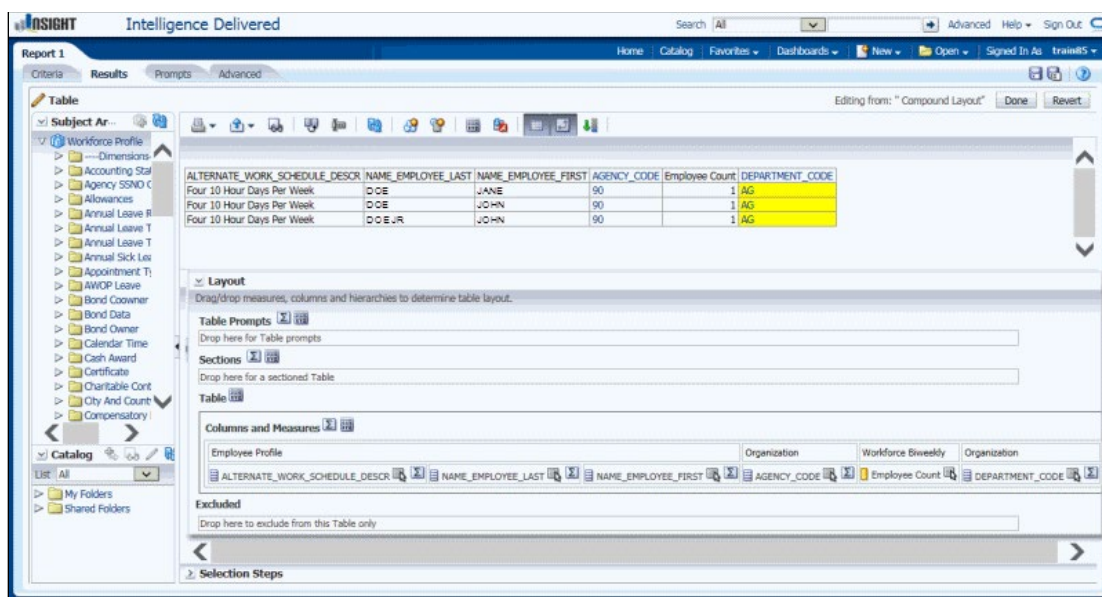


Figure 313: Table Layout Pane

Note: This functionality is covered in detail within the *Customizing Report Structure* section.

## Pivot Table View

### To Use the Pivot Table View:

1. Select **New** action link from the top navigation bar.
2. Select **Analysis** from the menu of options.
3. Select the desired Subject Areas for the ad hoc report.
4. Drag and drop data element(s)

**OR**

Double-click data element(s) from the Subject Areas pane to the Selected Columns pane.

5. Select the **Filter** icon from the Filter pane. The Filters pane is displayed.



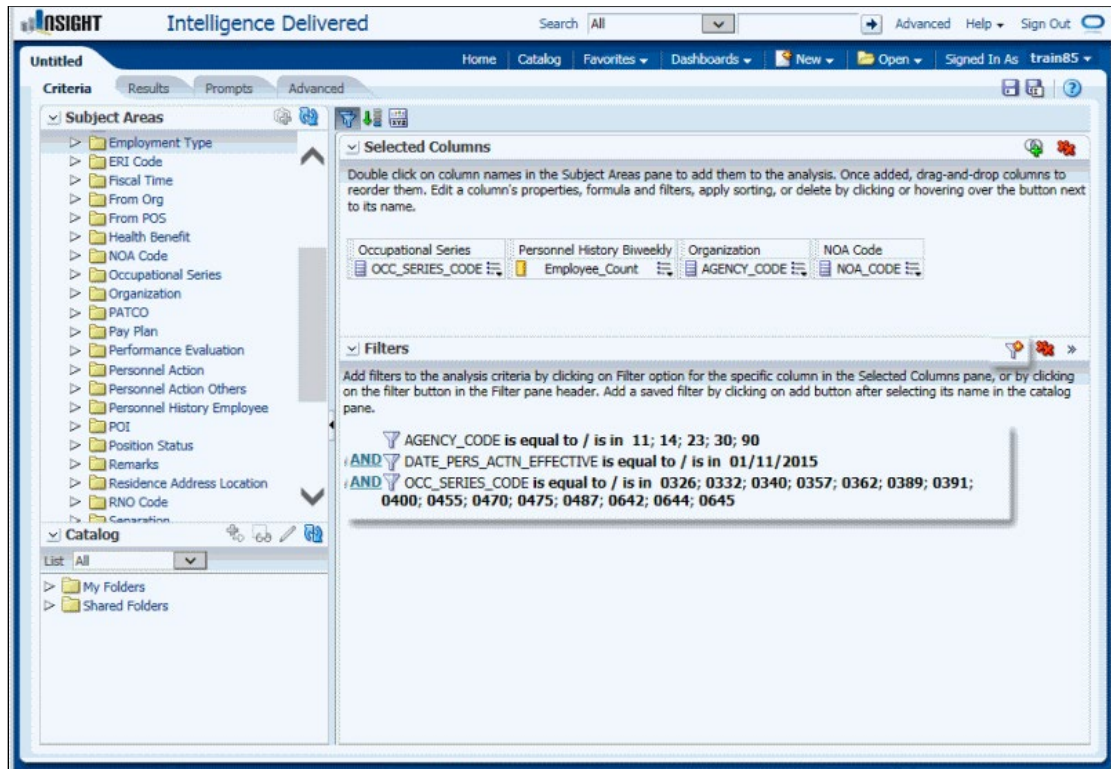


Figure 314: PERHIS Ad Hoc With Filter Pane

6. Select **Results** tab to run the report. The Results tab is displayed.

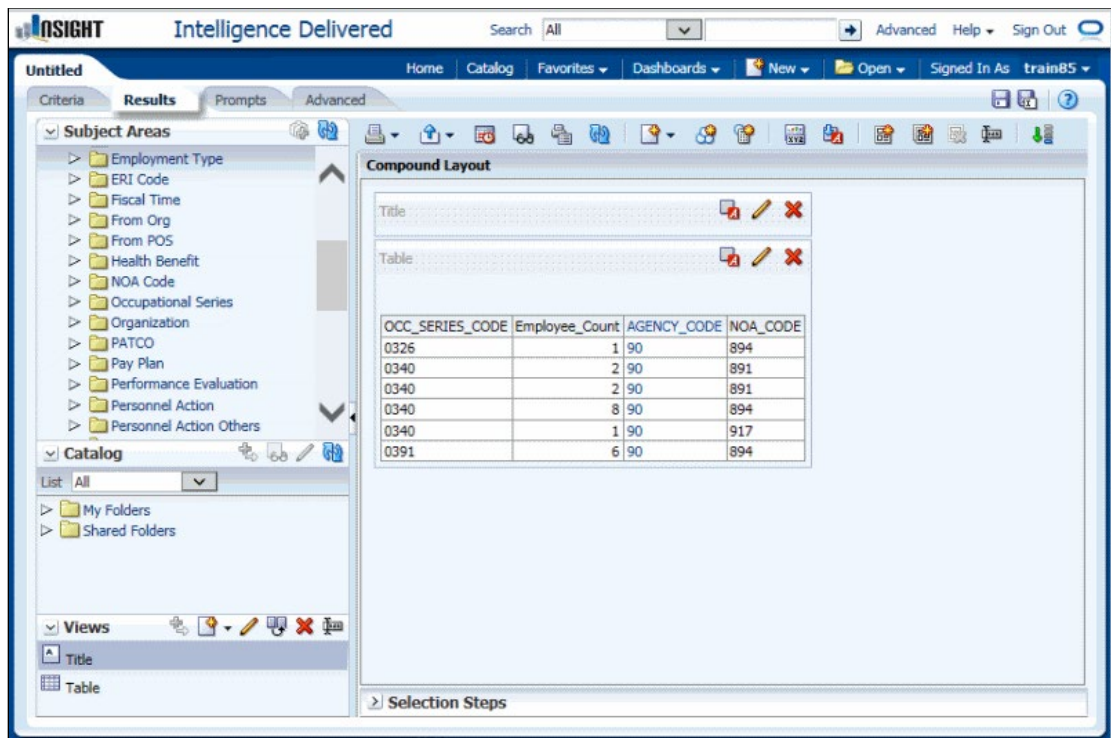



Figure 315: Results Tab to Run PERHIS Ad Hoc Report



7. Navigate to the Views pane on the Result tab and select the **New View** icon .
8. Select **Pivot Table** from the New View menu options. The Pivot Table is displayed.

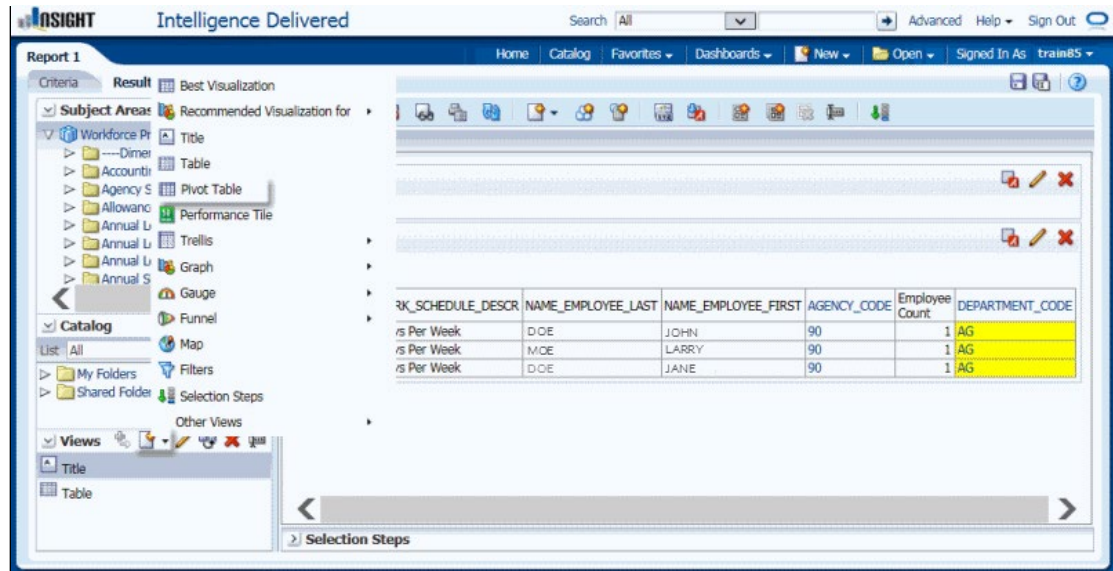



Figure 316: New View Icon With Menu Options

9. Select **Edit View** icon  for the pivot table report component. The Pivot Table pane is displayed in an editable mode.



The **Layout** pane is displayed. This pane contains options to manipulate how the data elements are arranged in the View.

The screenshot shows the Insight web application interface. The top navigation bar includes 'Home', 'Catalog', 'Favorites', 'Dashboards', 'New', 'Open', 'Signed In As', and 'train85'. The main area is divided into several panes. On the left, the 'Subject Areas' pane lists various categories like 'Employment Type', 'ERI Code', 'Fiscal Time', etc. Below it is the 'Catalog' pane with 'List' and 'All' options. The 'Views' pane at the bottom left shows 'Title', 'Table', and 'Pivot Table' options. The central 'Compound Layout' pane displays a 'Table' and a 'Pivot Table'. The 'Table' has columns 'OCC\_SERIES\_CODE', 'Employee\_Count', 'AGENCY\_CODE', and 'NOA\_CODE'. The 'Pivot Table' has a filter '90' and columns 'OCC\_SERIES\_CODE', 'NOA\_CODE', and 'Employee\_Count'. The 'Selection Steps' pane is at the bottom right.

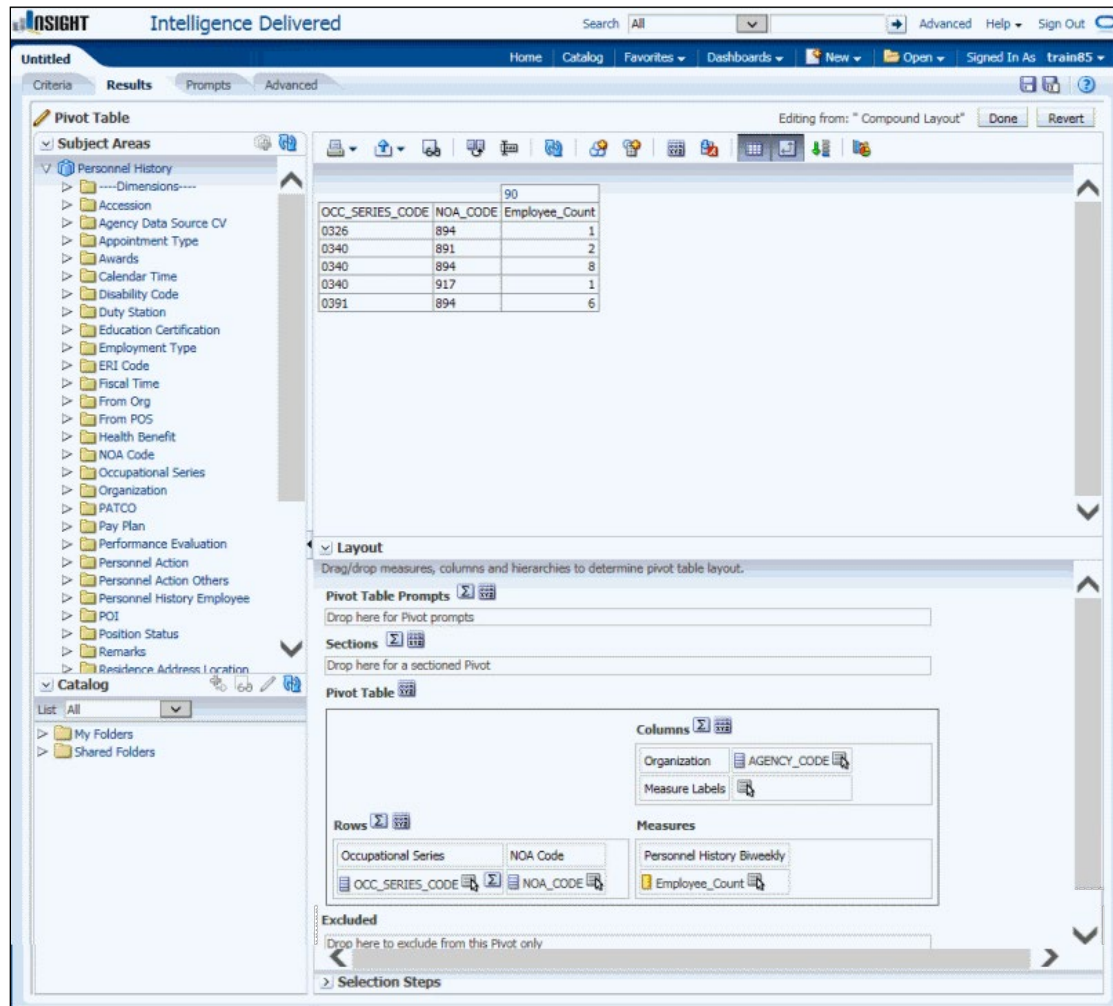
OCC_SERIES_CODE	Employee_Count	AGENCY_CODE	NOA_CODE
0326	1	90	894
0340	2	90	891
0340	2	90	891
0340	8	90	894
0340	1	90	917
0391	6	90	894

OCC_SERIES_CODE	NOA_CODE	Employee_Count
0326	894	1
0340	891	2
0340	894	8
0340	917	1
0391	894	6

Figure 317: Pivot Table with Edit Icon





**Figure 318: Pivot Table Layout Pane**

10. Drag and drop data elements to the sections in the **Layout** pane to edit the structure of the pivot table.
11. Drag data elements to the following sections within the **Layout** pane to edit the structure of the pivot table. Valid values are:
  - **Pivot Table Prompts:** Allows users to actively manipulate how data is restricted in the pivot table.
  - **Sections:** Breaks the pivot table into individual segments based on a specific data element.
  - **Rows:** Lists data elements that will display as rows within the pivot table.
  - **Columns:** List data elements that will be manipulated as part of the pivot table.
  - **Measures:** Lists numerical data elements that will populate within the pivot table based on defined rows, columns, etc.



- **Excluded:** Excludes data elements from displaying in the pivot.



12. Select **Rename View** icon located at the bottom left corner to change the title of the new view. The Rename View box is displayed.

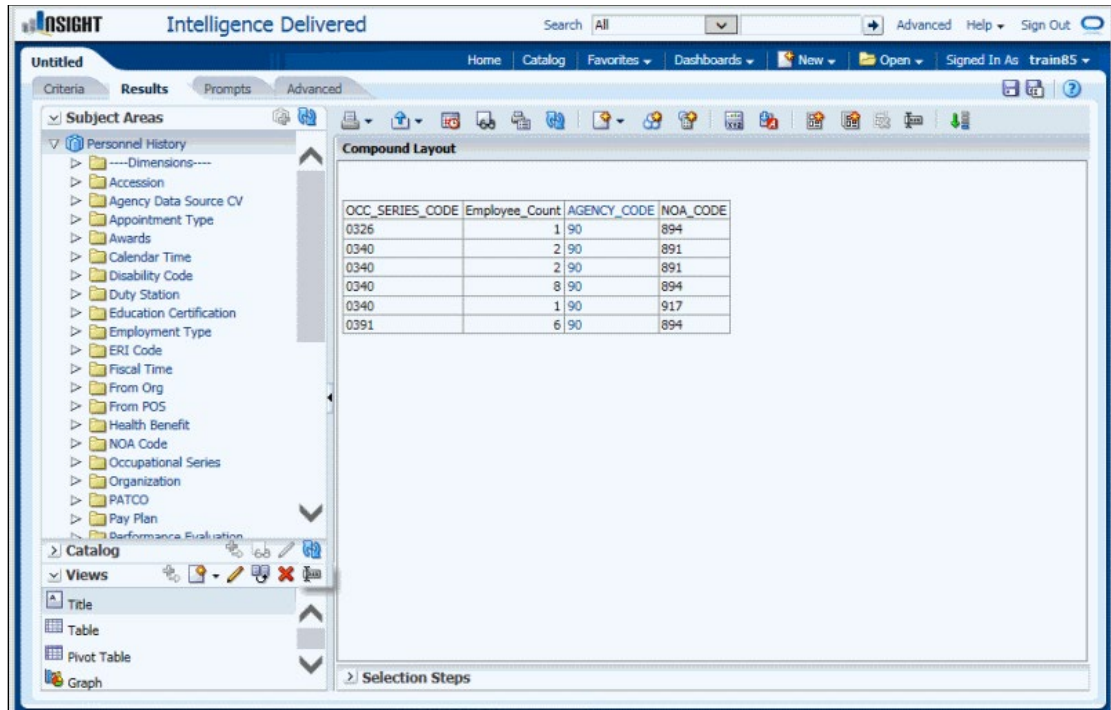


Figure 319: Rename View Icon

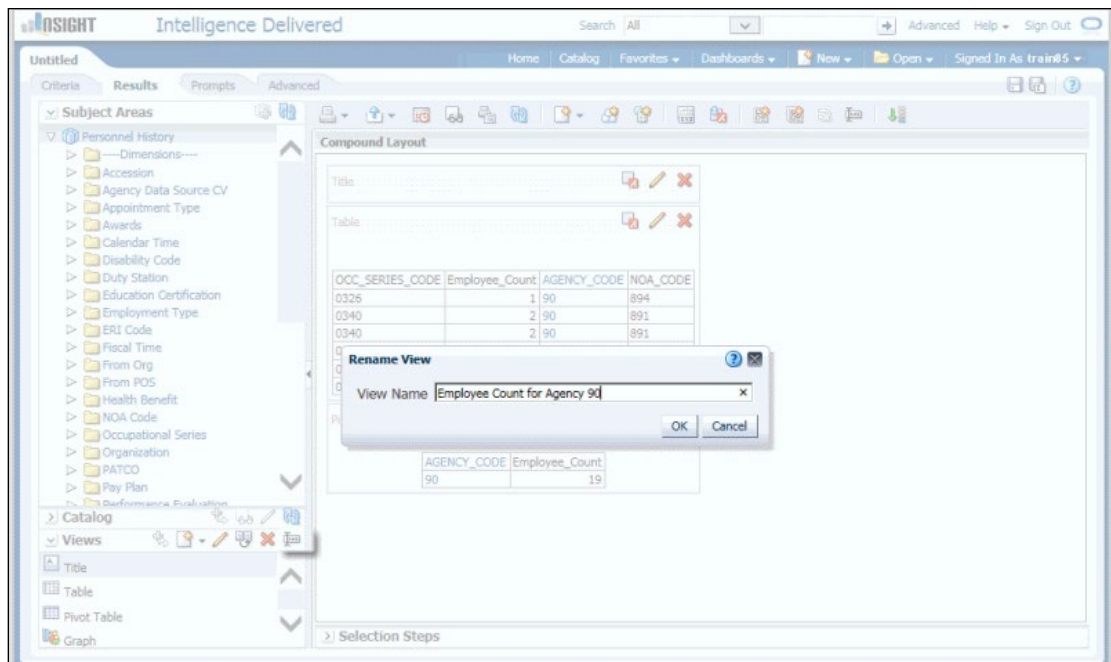


Figure 320: Rename View Window



13. Change the title to identify the new view.

The report will pivot based on data elements in the Columns workspace, resulting in a division of the data elements in the Rows workspace.

14. Select **OK** to close the popup.

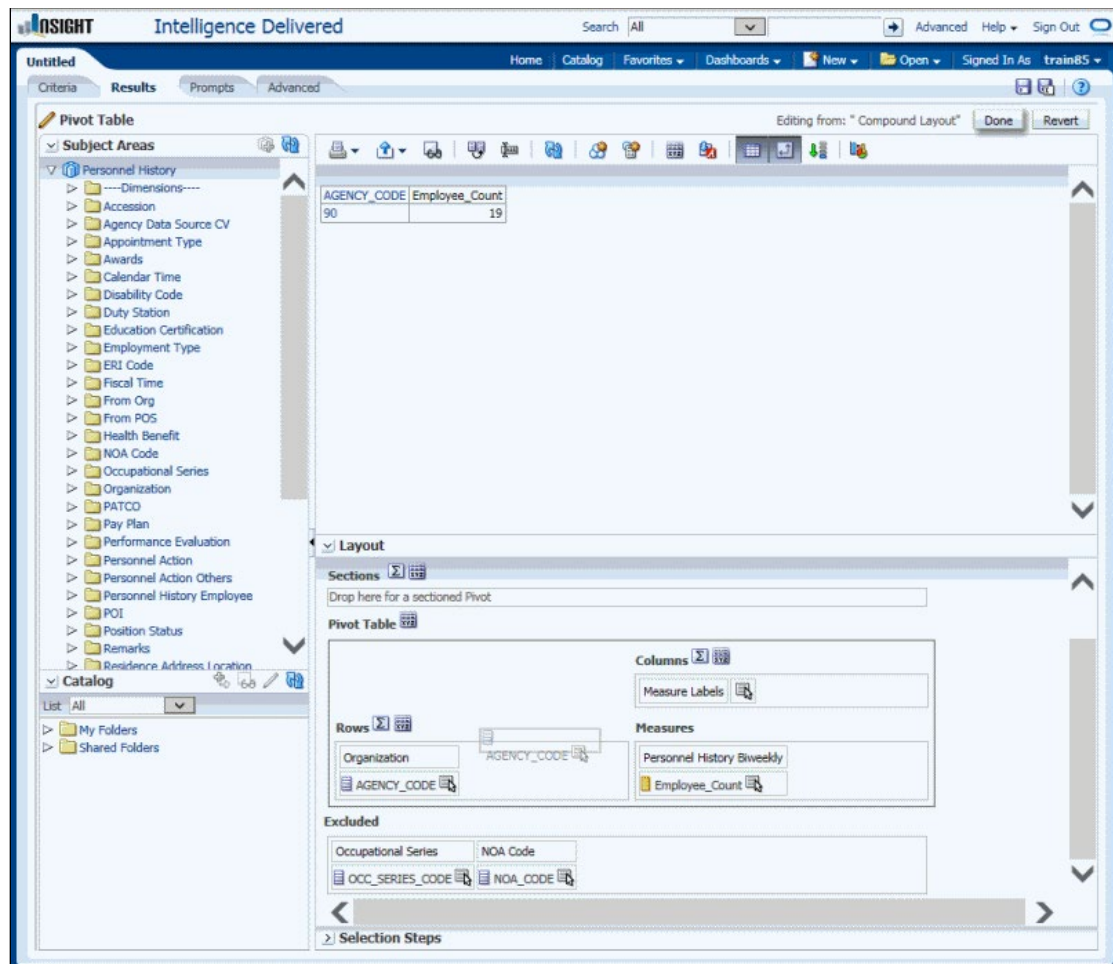


Figure 321: Layout Pane With Rows, Measures, Columns, and Excluded Section

15. Navigate to the Views pane to add the new view to the analysis.

16. Select **Add View** icon



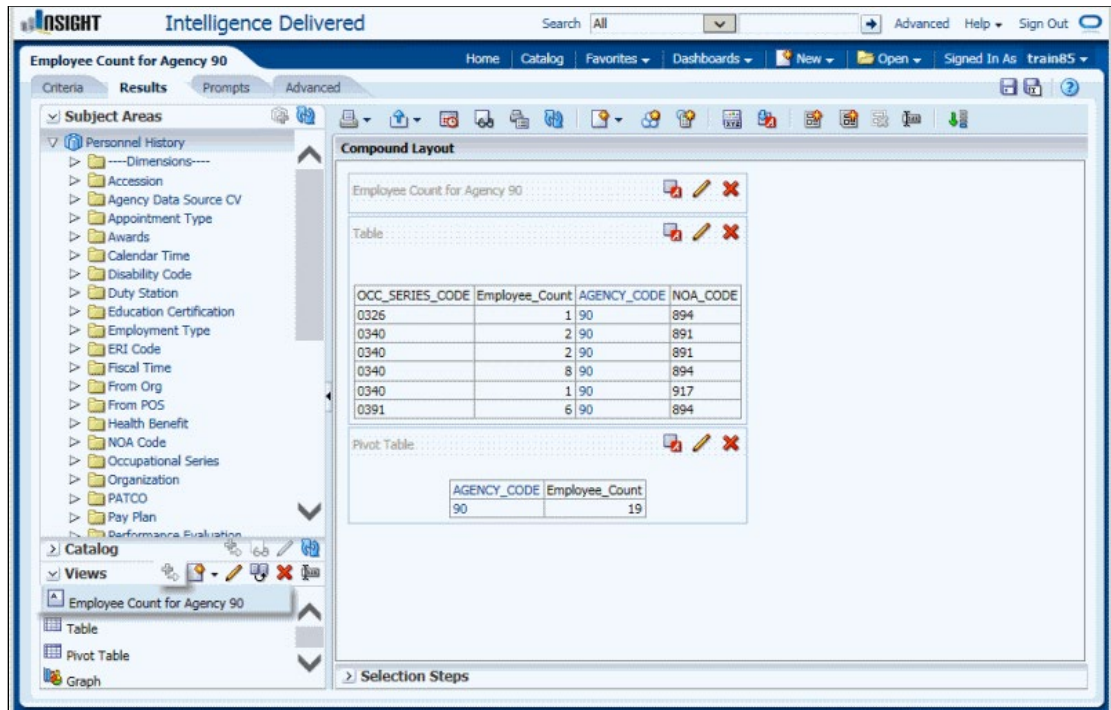


Figure 322: Views Pane With Add View Icon

17. View the updates to the pivot table based on customizations made in the **Layout** pane.



18. Select **Save As** icon to save customizations made to the report.



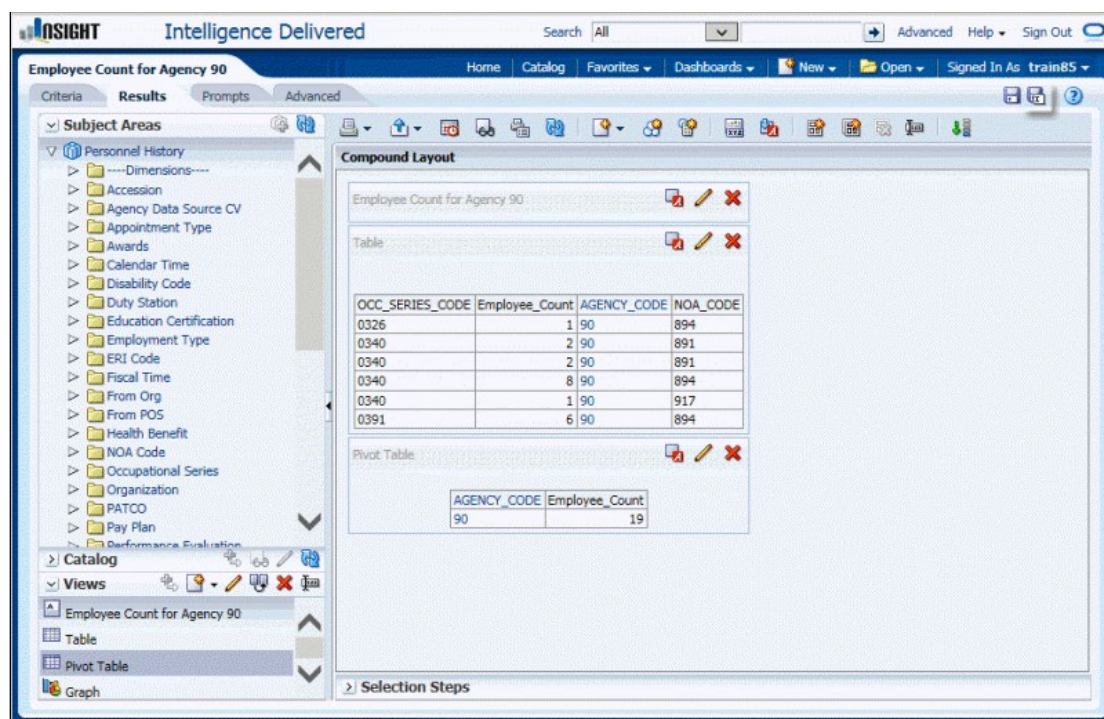


Figure 323: Pivot Table in the Results Tab With Save As Icon

## Filters Record View

To Use the Filters Record View:

1. Select the **Results** tab. The Results tab is displayed.
2. Select the **Views** pane on the Results tab.
3. Select **Filters** from the New View menu options in the Views pane.

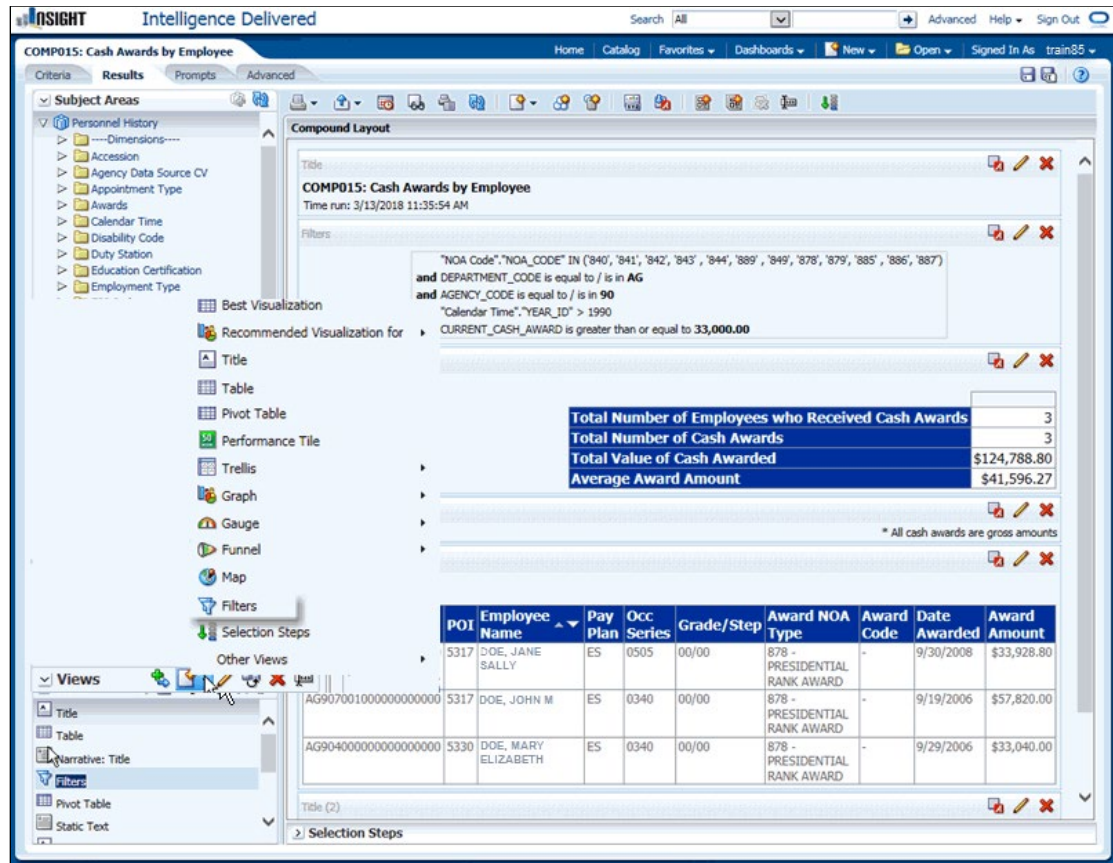


Figure 324: New View Options

4. View the **Filters** record component of the report. The **Filters** record will create a vertical list of all filters applied to the report.



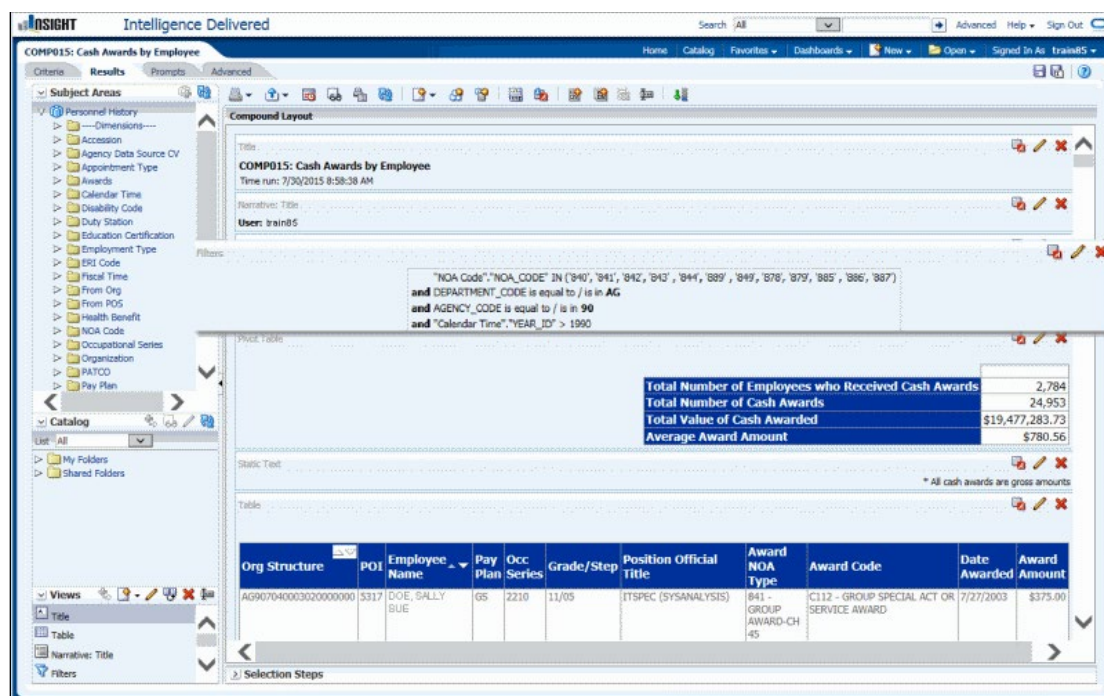


Figure 325: Filters Record

Note: The **Filters** record will update based on the filters included in the report as well as any prompt selections made at the time the report runs.

## Graph View

### To Use the Graph View:

1. Select the **Results** tab.
2. Select the **Views** pane on the Results tab.
3. Navigate to the Views pane in the Results tab.
4. Select **Graph** from the **New View** menu options in the Views pane.
5. Select the desired graph type.



The **Layout** pane is displayed.

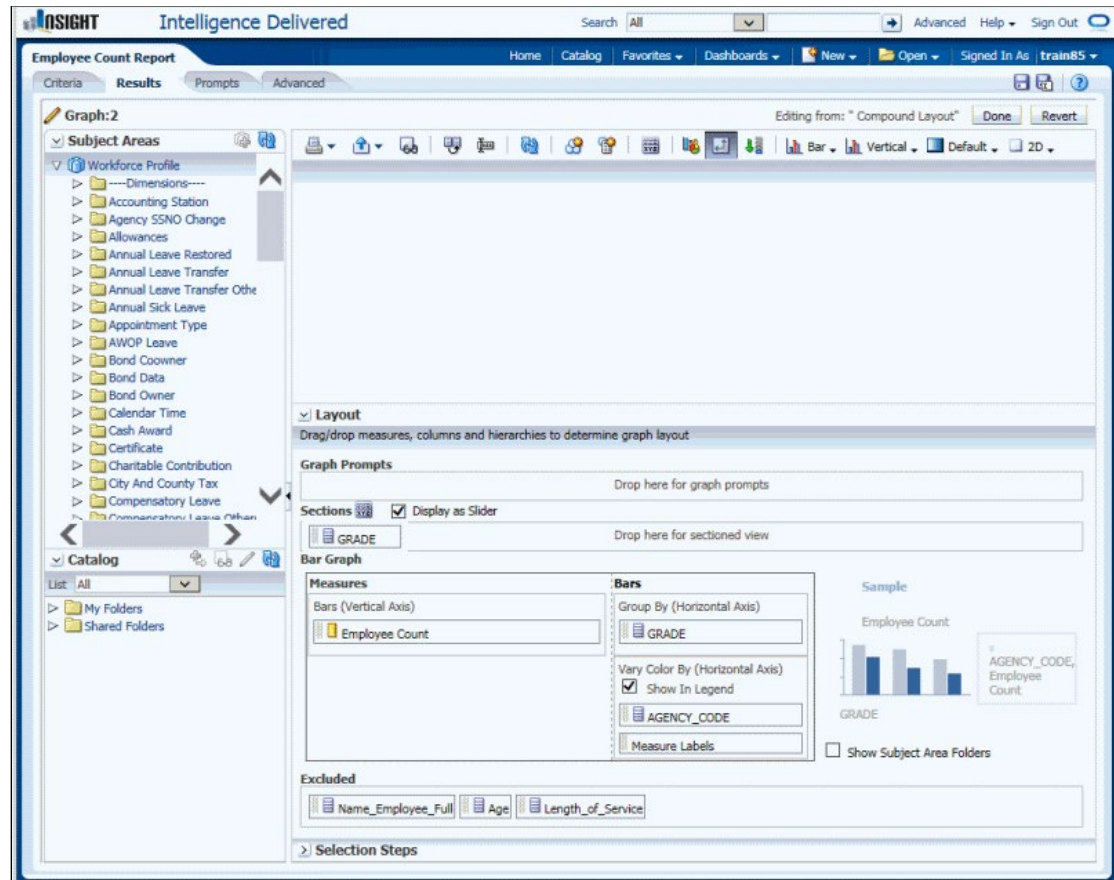


Figure 326: Graph Layout Pane

6. Drag data elements to the targeted sections in the Layout pane.
7. Select **Display as Slider** checkbox.

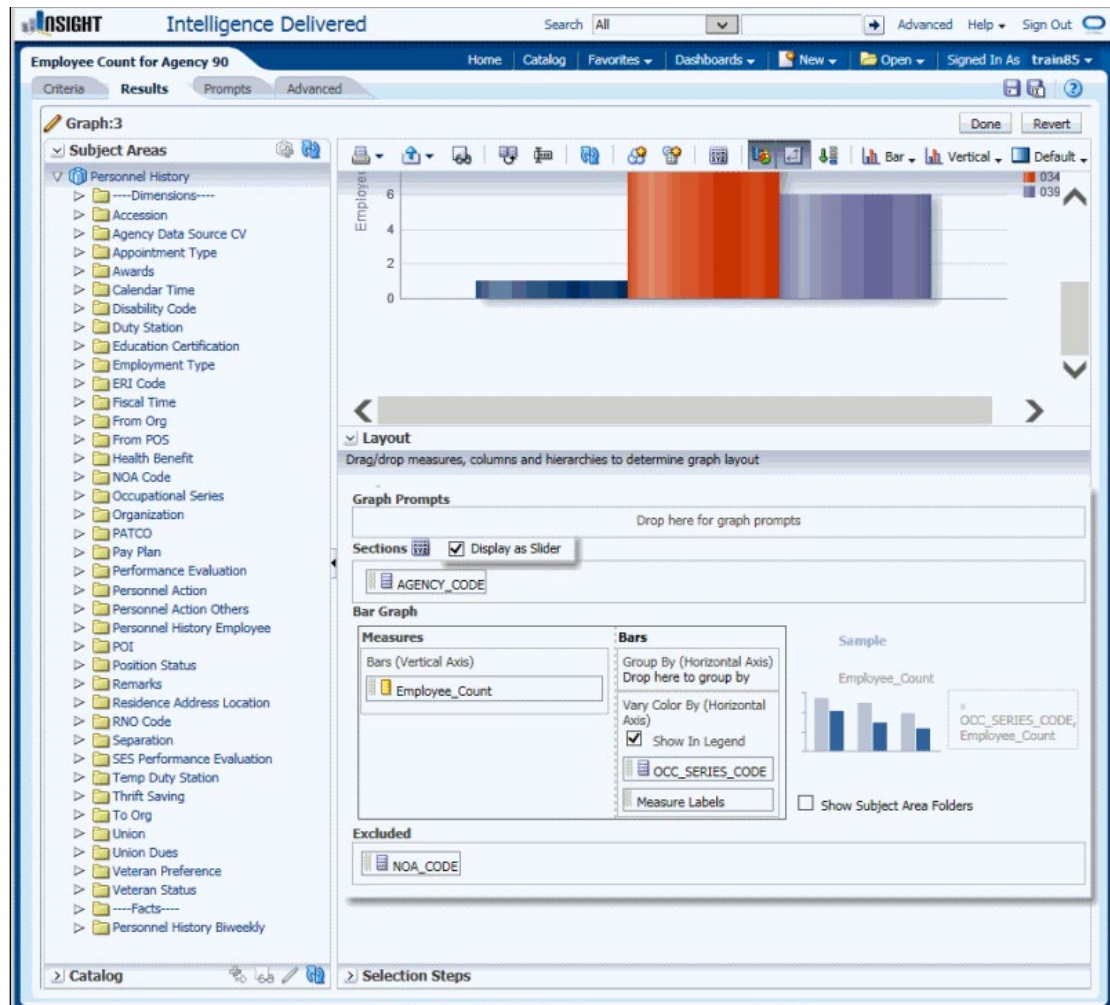


Figure 327: Graph Layout Pane with Data Elements Targeted Sections

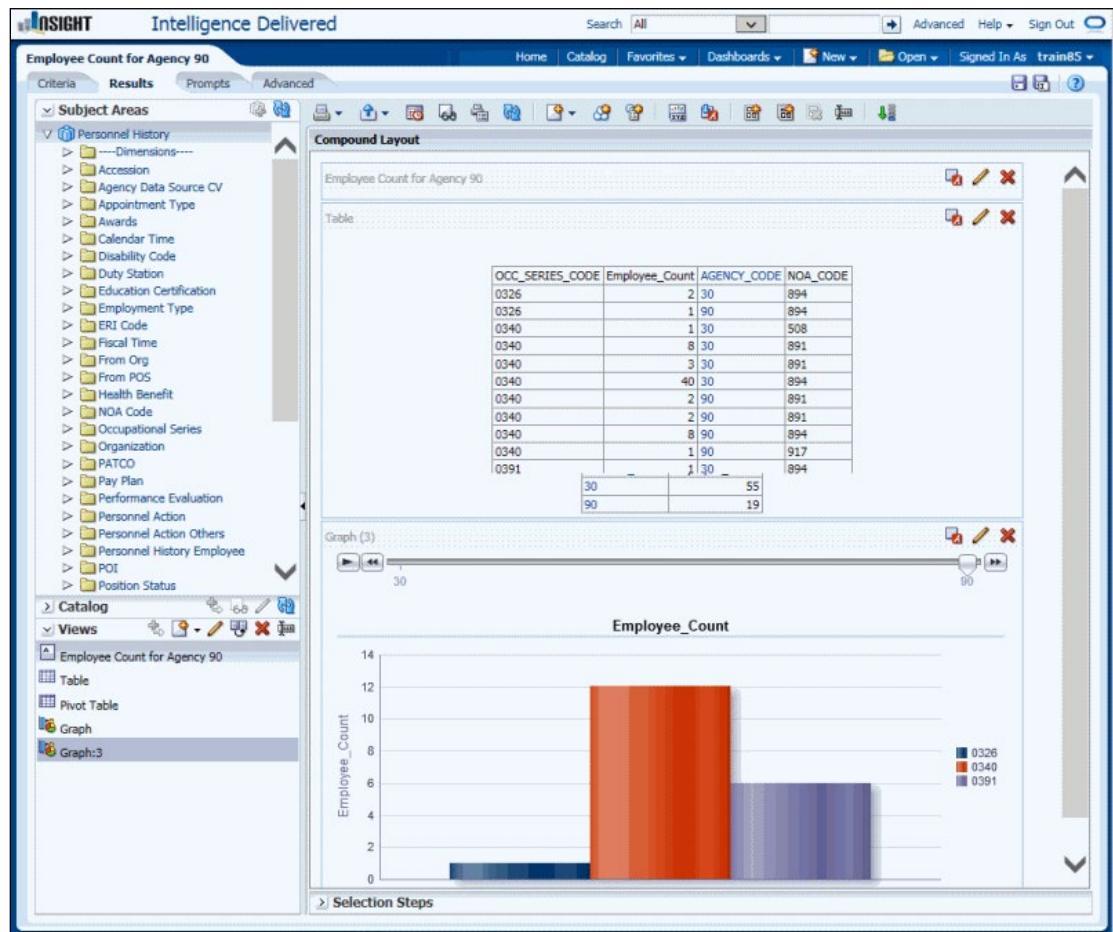


Figure 328: Bar Graph With Display Slider

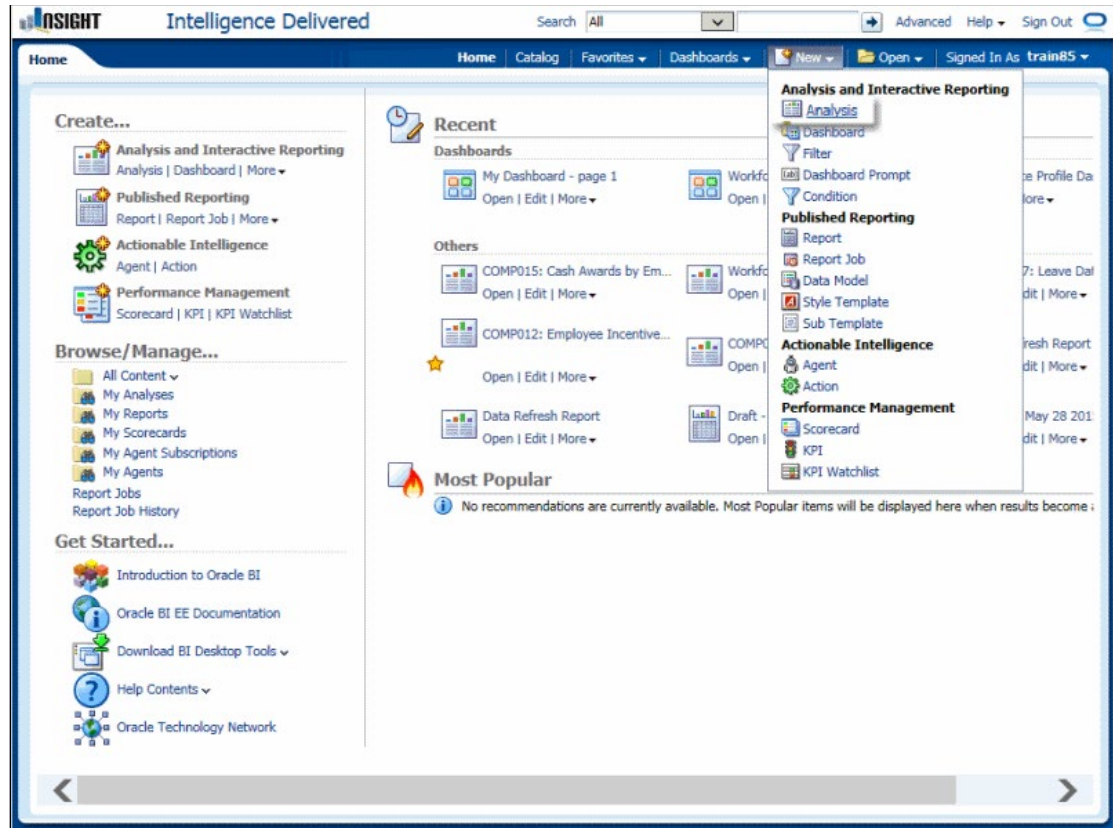
8. Navigate to the Views pane to add the new view to the analysis.
9. Select **Add View** icon.
10. Select **Save As** icon to save the report.

## Map Viewer

Note: The Map Viewer functionality is only available for the WFP subject area.

### To Use the Map Viewer:

1. Select **New** action link in the top navigation bar.
2. Select **Analysis** from the menu of options. The Analysis and Interactive Reporting Options are displayed.



**Figure 329: Analysis and Interactive Reporting Options**

3. Select the desired Subject Area for the ad hoc report.
4. Drag and drop data elements from the Subject Areas pane to the Selected Columns pane.





Note: Users must add the Employee Count data element from the WFP fact folder. The WFP fact folders consist of WFP Biweekly.

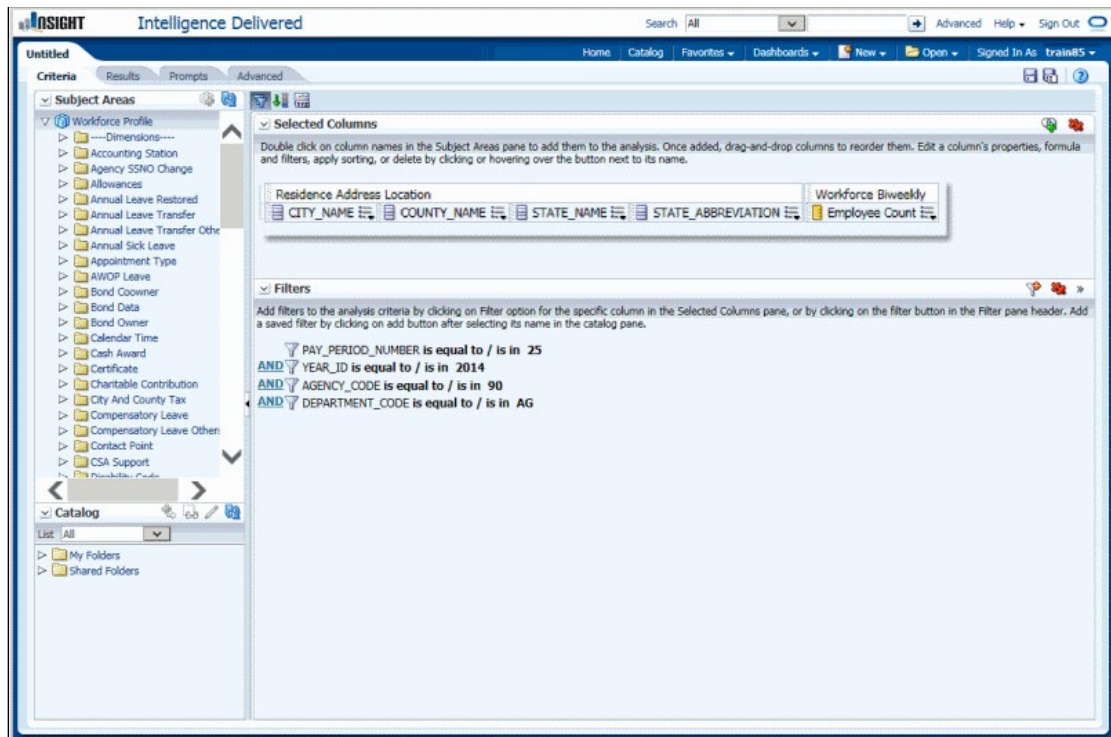


Figure 330: Data Elements in the Selected Columns Pane

5. Create applicable filters.
6. Select **Filter** icon.
7. Select the "More Columns..." to create filters for any data elements not listed within the Selected Columns pane.

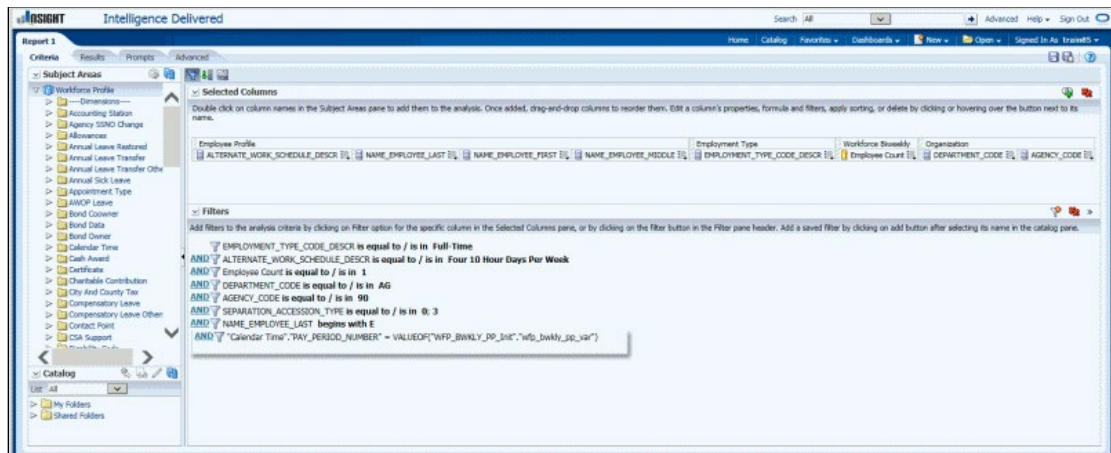


Figure 331: New Filters in the Filters Pane for Pay Period Number





Note: For any report, you must add the necessary Calendar Filters to restrict your data to a particular timeframe.

8. Select the **Results** tab.
9. Select the **Views** pane on the Results tab.
10. Navigate to the Results tab.
11. Select the Views pane in the Results tab.
12. Select **Map** from the **New View** menu options in the Views pane.

Note: If you are not immediately directed to the **Map View** edit screen from the Views pane, select **Map** in the **Edit View** icon.

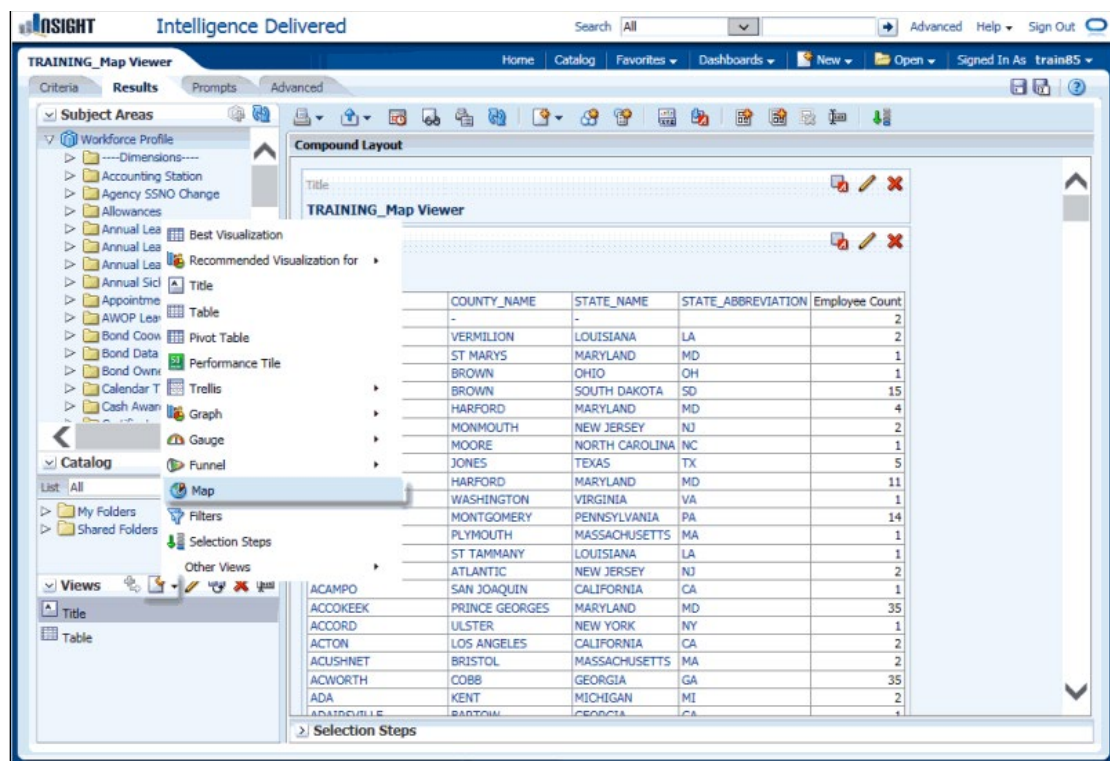


Figure 332: New View Icon Menu Options (Select Map)



The default map is displayed, featuring the map and BI Data Layers pane with Residence State layer depicted.

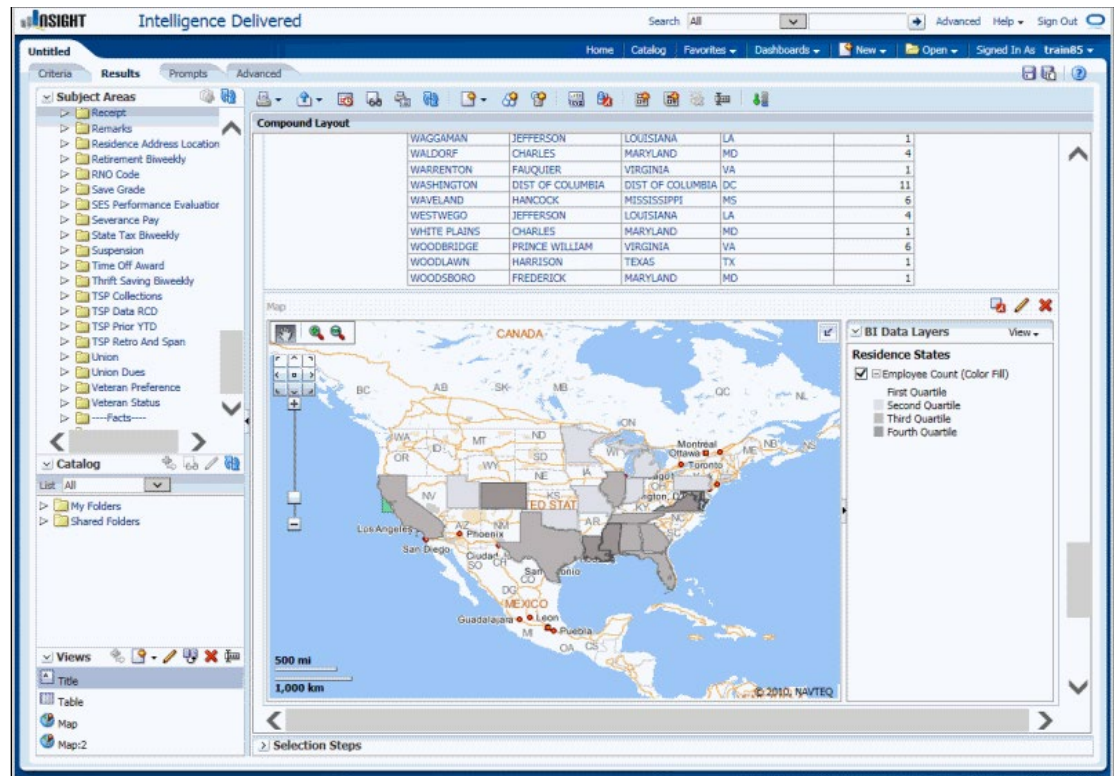


Figure 333: Default Map

13. Select **Edit View** icon in the BI Data Layers pane.

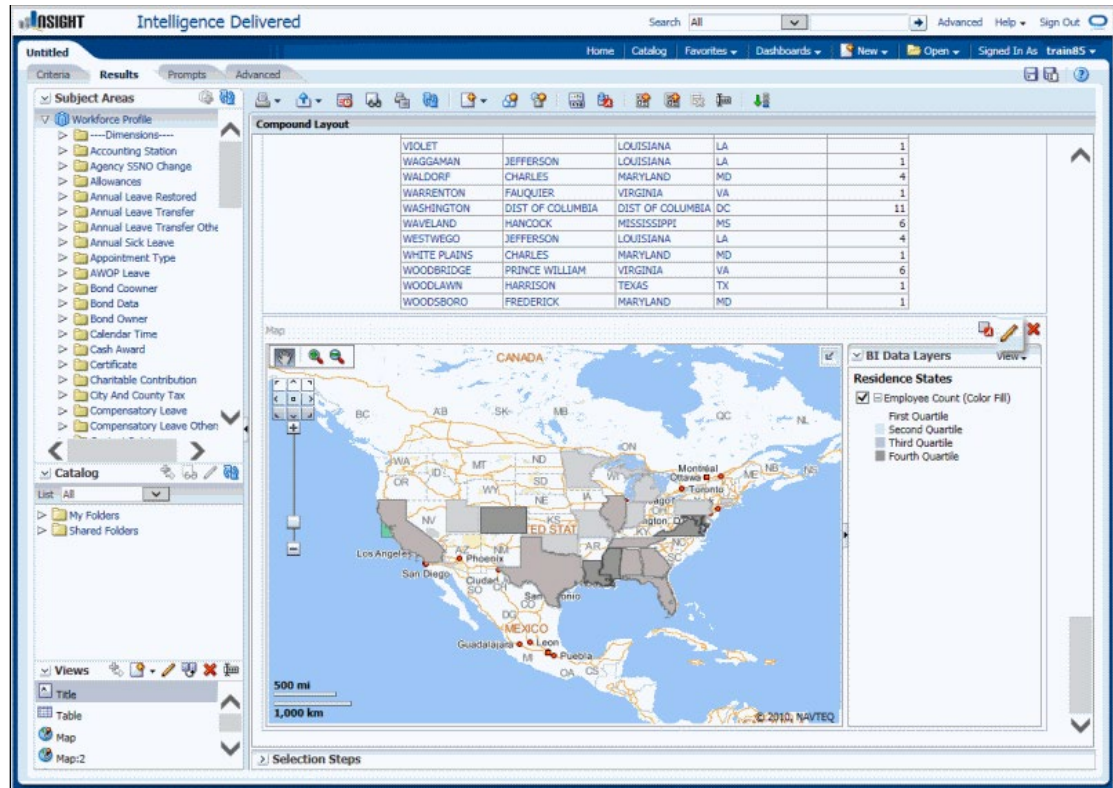


Figure 334: BI Data Layers With Edit View Icon

14. Select **New View** icon in the Data Layers pane.

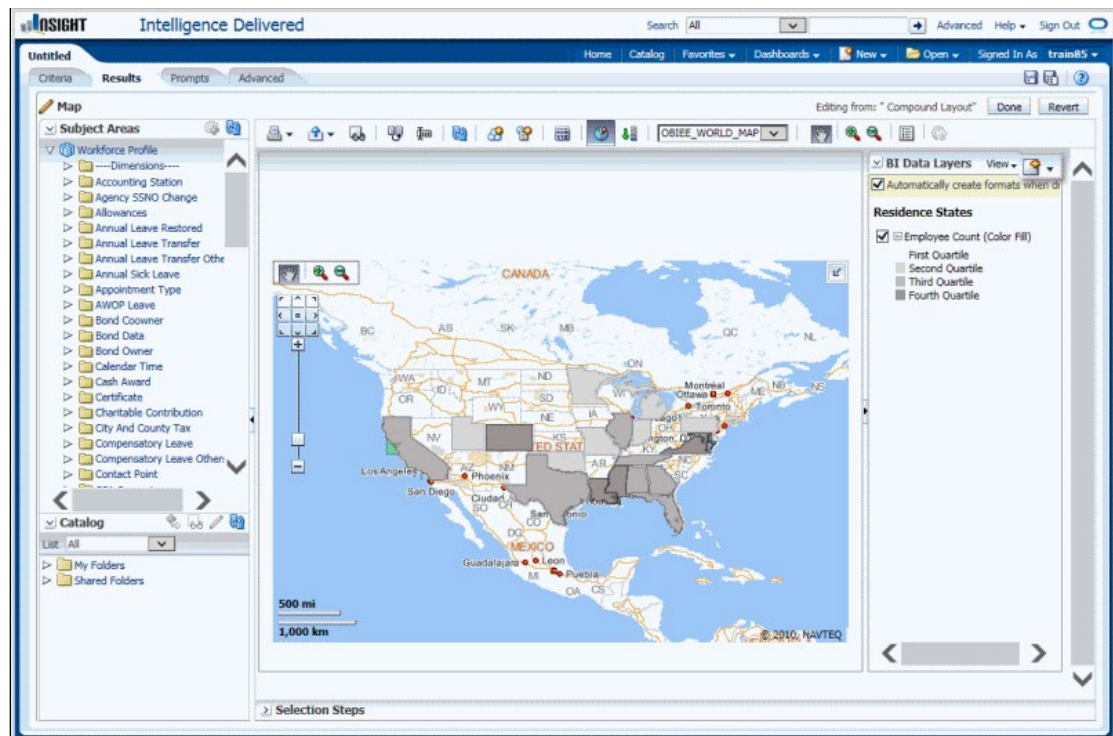


Figure 335: BI Data Layers With New View Icon



15. Select **Color Fill**. The Color Fill options are displayed.

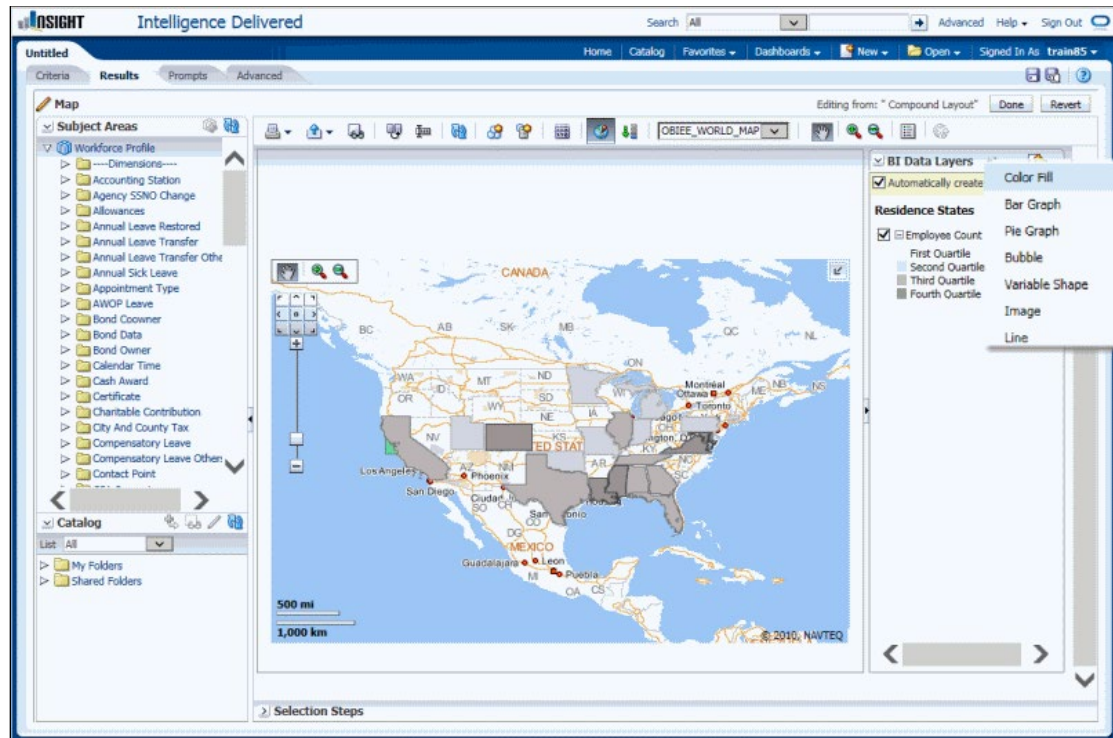


Figure 336: New View Menu Options (Select Color Fill)

16. Select **Residence States**, **Residence Counties**, or **Residence Cities** to view the number of employees per State.





Note: Select Residence Counties or Residence Cities to view data by either county or city.

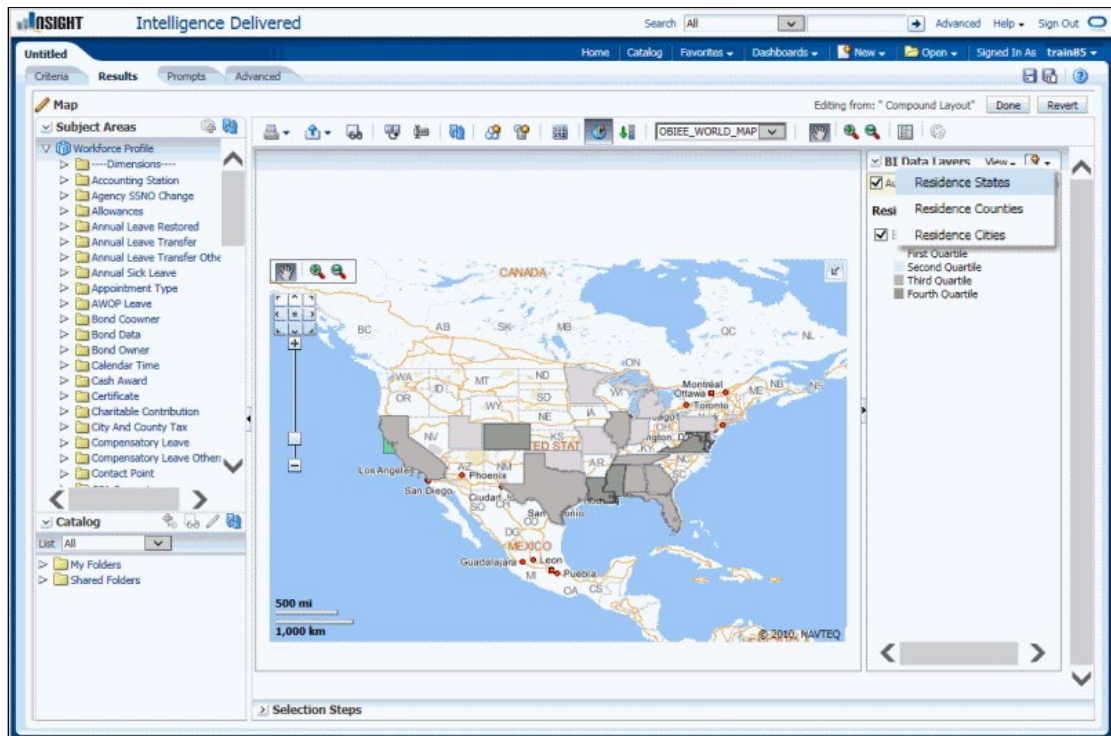


Figure 337: New View Menu Options (Select Residence States)

17. The Color Fill options are displayed. Select the desired formatting options.

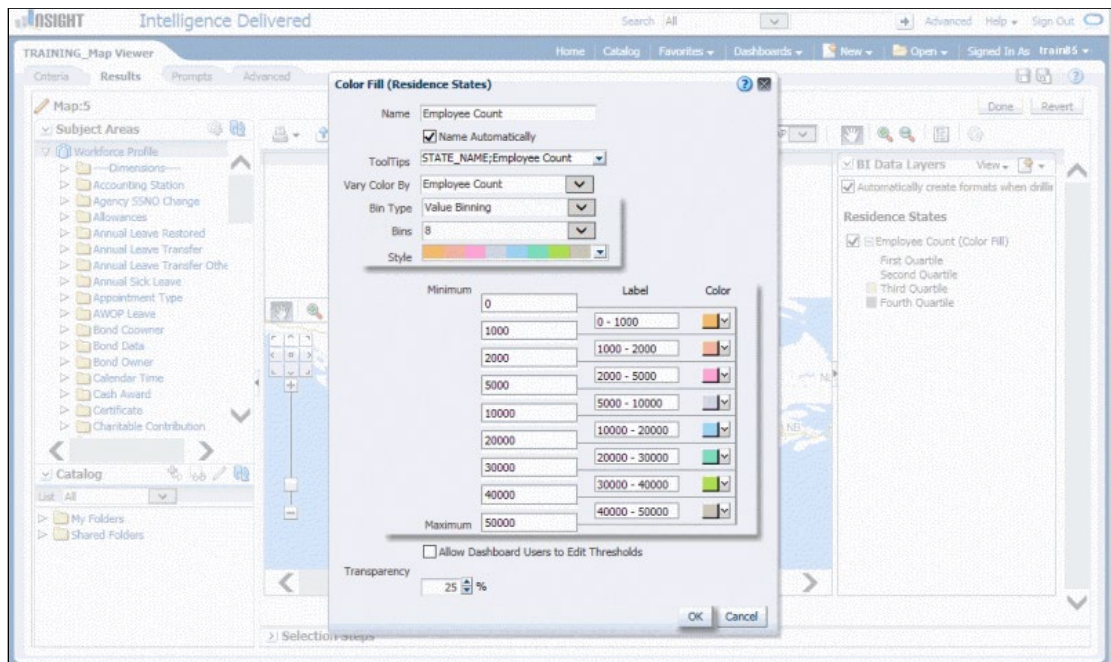


Figure 338: Color Fill Window (Bin Type, Bins, Style, and Minimum Fields)



18. Select **OK** to close the popup.

Note: To change the values in the Minimum option, select the "x" to clear the field and enter the values.

19. To create a new layer, edit or delete, hover over the Employee Count data element. The applicable icons will appear.

20. Select **New View** icon in the Data Layer pane to include or hide a given layer.

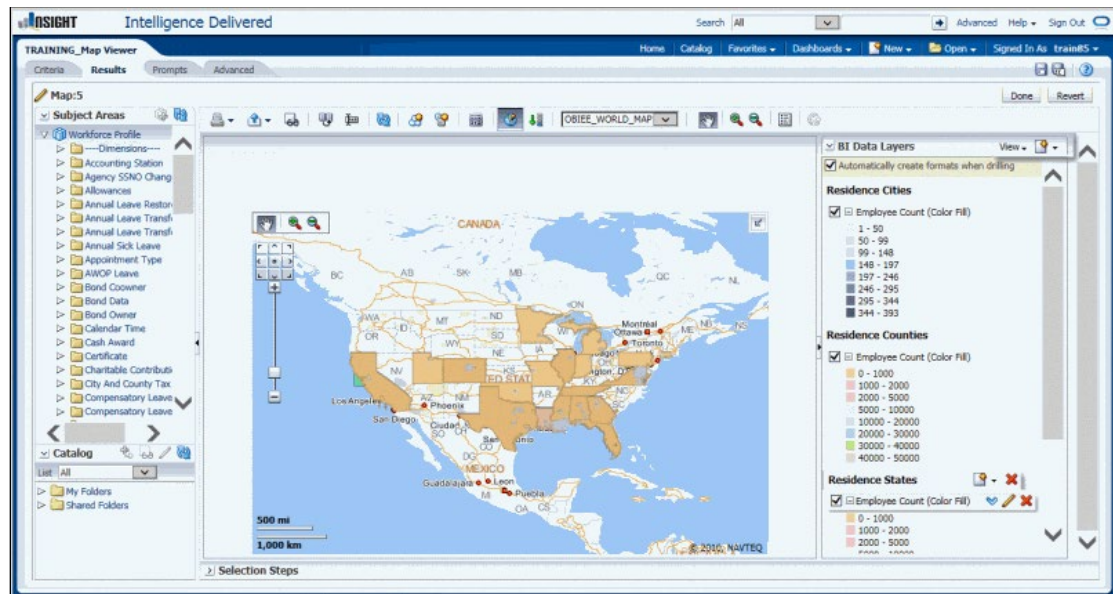


Figure 339: Residence States New View and Employee Count Edit





The map is displayed featuring the data formatting modifications.

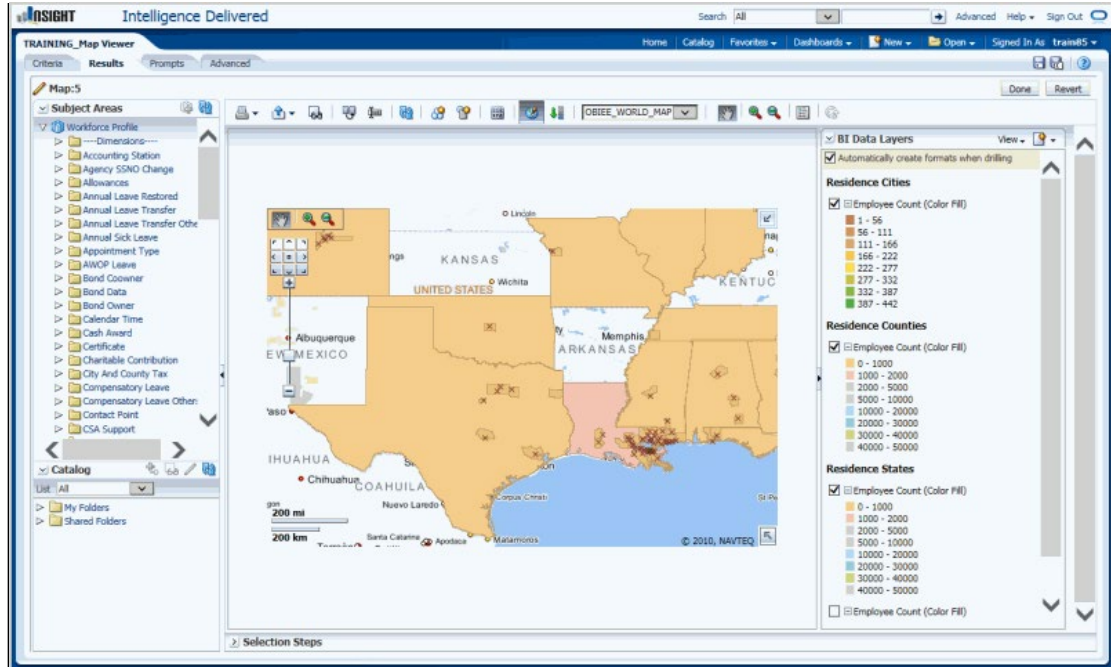


Figure 340: Map With User-Specified Modifications

21. Select **Expand Map Legend** icon to view the map legend.

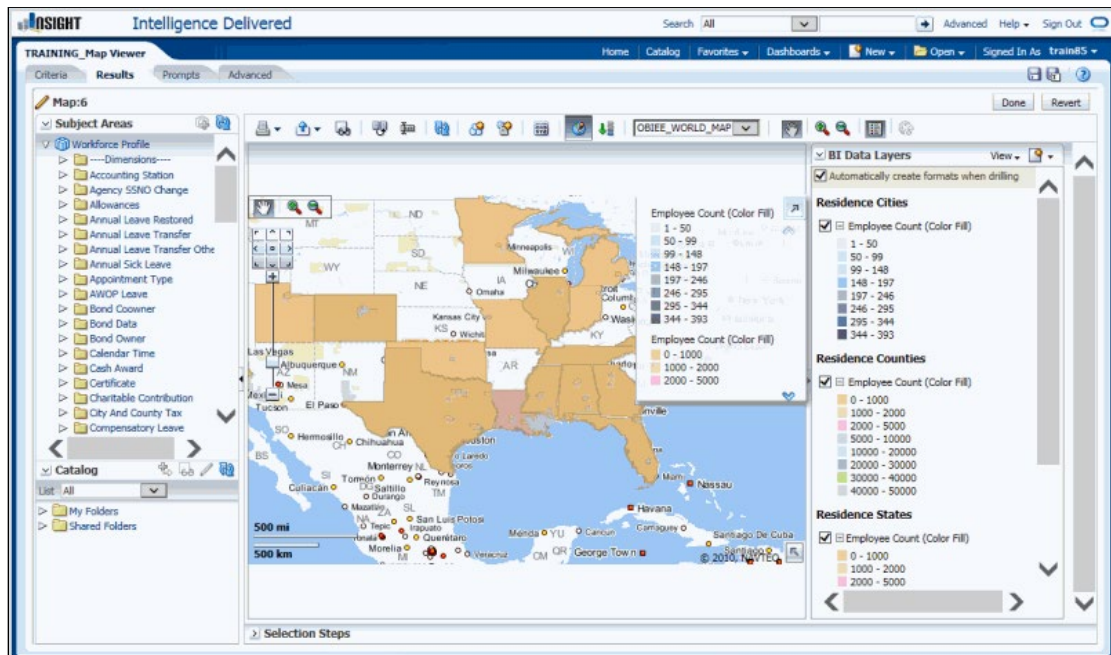


Figure 341: Map With Expand Map Legend Icon

22. Hover over a State, county, city or select zoom to view the State name and associated data.

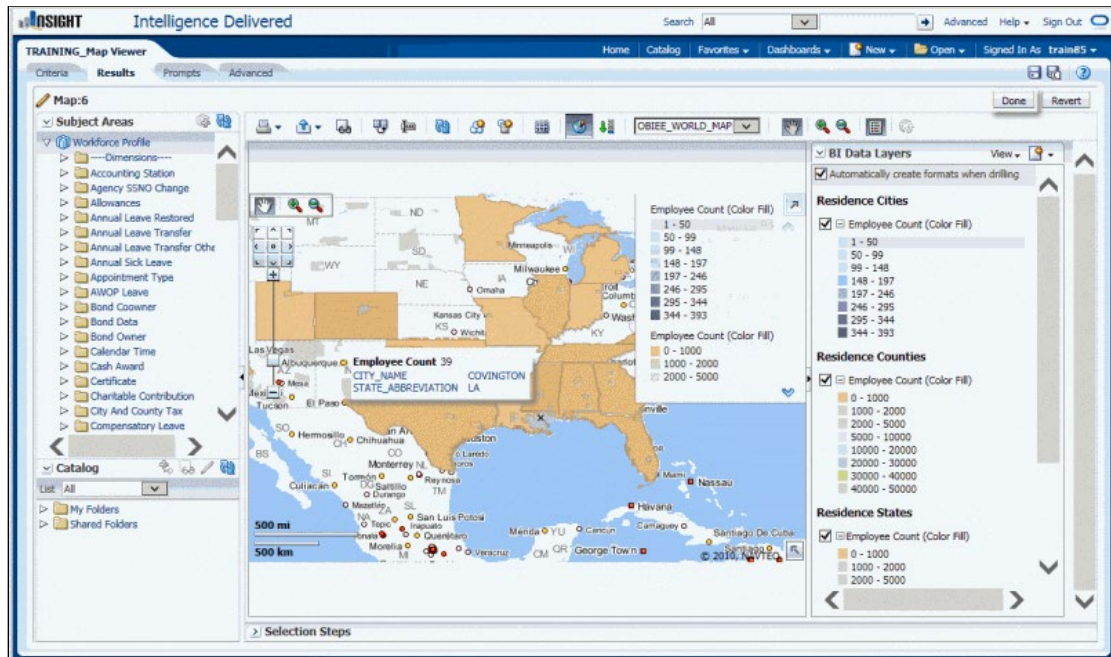


Figure 342: Displaying the Option to Hover Over

23. Select **Zoom in** or **Zoom out** to modify the magnification of the map.

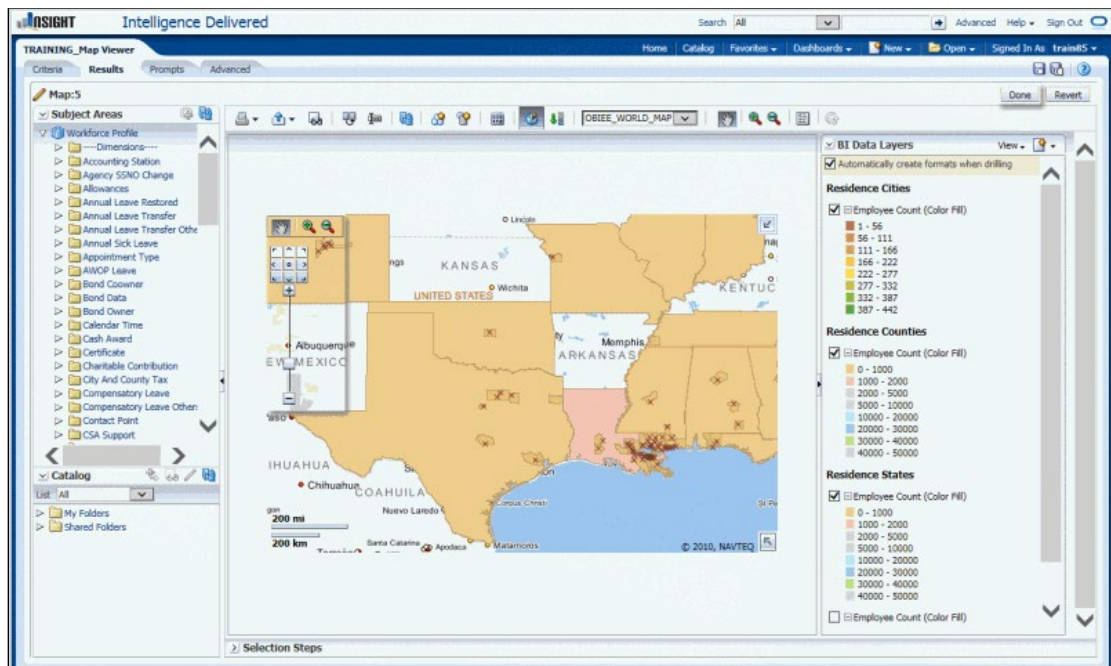


Figure 343: Zoom In and Zoom Out on Map



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