

You rely on the reports on the shared dashboard sets – Financials, Employee, Student, etc. – in order to complete your work each day. Most often, you can get the information you need by selecting different values in the prompts, applying those filters, and using the various reports directly from the dashboards. Sometimes, however, you need to make a few modifications to the available analysis. This is where the Analyze link comes in handy.

Where is the Analyze Link?

On most analyses on most dashboard pages you will see an Analyze link at the bottom of each report. You can use that link to create a copy of the report for yourself, without affecting or harming the original report that lives on the dashboard page.

The Analyze Link is Missing

If the Analyze link doesn't exist for a particular report, it's likely that the report is what is known as a direct database analysis. That means the report is pulling data directly from the data warehouse and is not getting data from a Subject Area in Analytics. You won't have the ability to make any edits, even if you were able to create a copy.

Using the Analyze Link

Assuming the Analyze link is available, the basic procedure for using it is straightforward.

1. Set the dashboard prompts on the page to find the data you need.
2. Click **Apply** to run the prompts.
3. Once the page and report have run, click the **Analyze** link at the bottom of the desired report. A copy of the analysis will open in the edit screen.
4. Click the **Save As** button near the upper-right corner of the screen. Even though the system initially thinks you will be saving the analysis in a shared folder, you don't really have the ability to do that. You can't hurt anything.
5. Click the **My Folders** folder in the Save As screen to save the analysis in your own personal folder. Alternatively, if you plan on using this copy of the original report on your own college or department dashboard, locate and select the appropriate shared folder.
6. Change the name of the analysis, if you wish, and add any description information you desire. It's now your analysis!

Is This the Right Resource Document?

If your newly copied report has a view selector and you wish to use just one of the available views, you should download the **Next Steps: Constructing and Deconstructing View Selectors** document from the **Resources > UAccess Analytics** page on the UAccess Community. That document will better help you through the process of working with that type of analysis.

Working with Dashboards: Using the Analyze Link

If your new report has just one view – a table or a pivot table, most likely – continue with this resource document and begin making your modifications.

Making the Desired Modifications

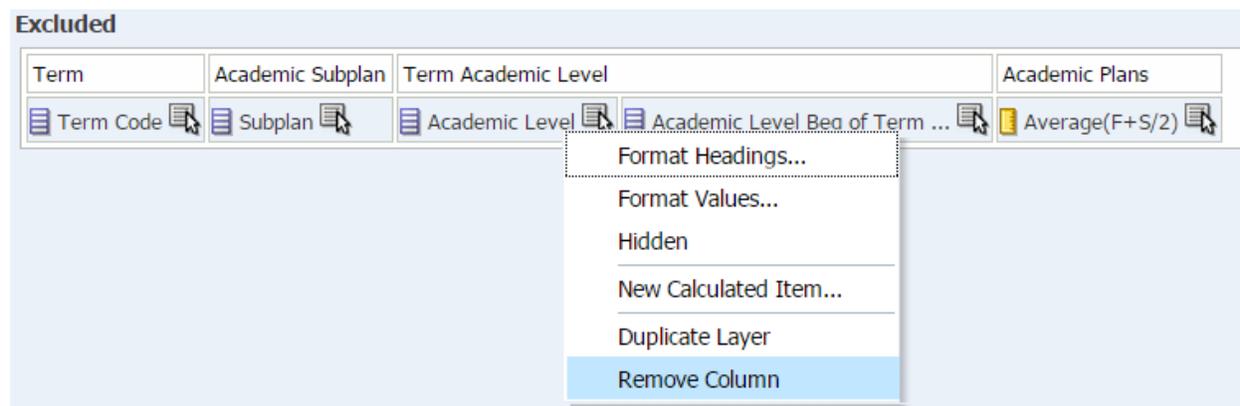
At this point, you can begin making the modifications you need. Add any required data columns, move existing data columns around, and add any filters you need. If you’re familiar with creating basic reports, this will all be straightforward work.

Now that you’ve added new columns, moved data columns around, and made any other desired modifications to the existing analysis, you may feel that you’re done. Not quite yet, however. There are a few other things you could do to make this report much easier to use over the long run.

Cleaning Up the Analysis – Removing Unused Data Columns

From the **Results** tab, click the **Edit View** (pencil) button on the Table or Pivot Table view. When you edit either of these views, you’ll have a preview pane on the upper right side of the screen, with a Layout pane immediately below the preview. As you scroll through the Layout pane you’ll see a number of different fields and areas.

At the bottom of the Layout pane is the **Excluded** area. That field contains all of the different data columns that are not being used in the particular view you’re editing, but that are nonetheless contained within this report. You can probably delete them without harming the analysis, and you should delete those data columns if they’re not being used.



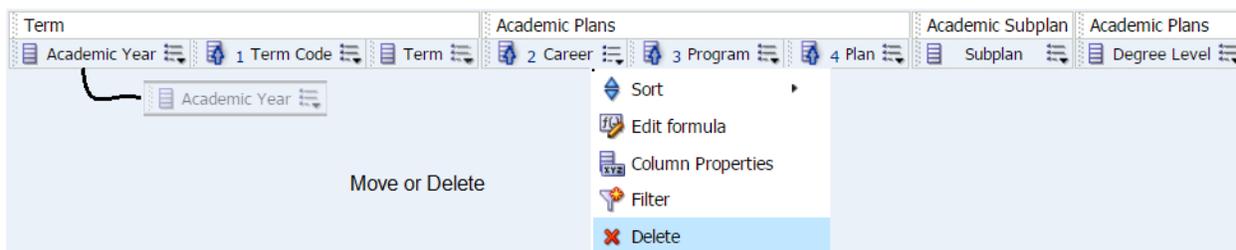
The clearest way to delete these data columns is to remove them right from this edit screen. Just click the **More Options** button for each of the data columns you no longer need and select **Remove Column** from the menu, then click OK when asked if you’re sure you want to remove the column from all views. That data column will be removed from the analysis.

Be sure to click the **Save** button after making your changes.

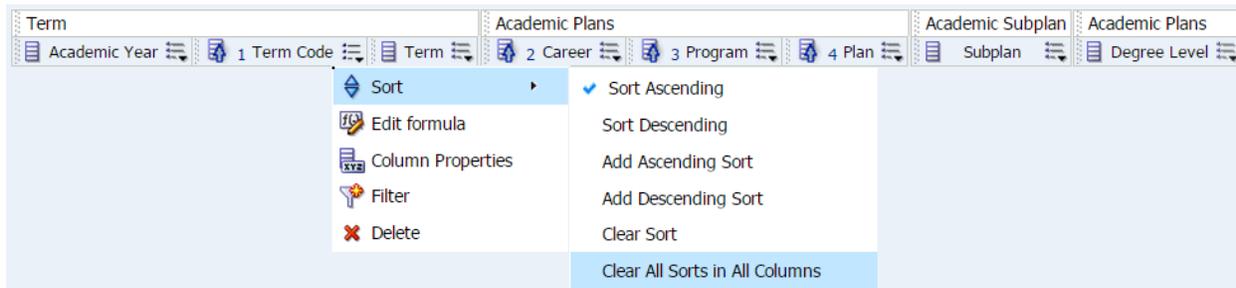
Cleaning Up the Analysis – Rearranging Data Columns

The next clean up you might want to do is to delete any remaining unused data columns from the **Criteria** tab, then rearrange the remaining data columns so that the columns are in the same left-to-right order on the Criteria tab as they are on the Results tab. This is especially important if anyone will be regularly downloading the data to Excel and they wish to see the data columns in the resulting spreadsheet in the same order they’re used to seeing them in Analytics.

The reason is that when a user clicks the **Export** link from the Results tab or from a dashboard page and selects either **Data > CSV Format** or **Data > Tab delimited Format** from the menu, the report runs again and exports the data *directly from the Criteria tab* in the order that the columns appear on that tab. If the user wants to see the data in a particular order, then the data columns need to be prearranged so the columns export in that particular order.



While you’re here, you might also want to remove any sorting that’s been applied, as that sorting can affect the way you see the results in Analytics.

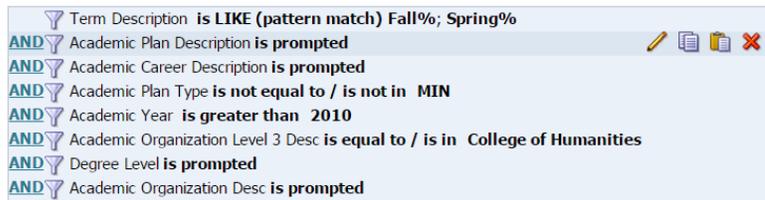


You can readily identify those columns that have sorting applied, as they will each have a blue arrow pointing up or down on the left end of the column. To clear that sorting, click the **Options** button on any of the existing data columns, then select **Sort > Clear All Sorts in All Columns** from the menu.

Be sure to click the **Save** button after making your changes.

Cleaning Up the Analysis – Removing Unused Filters

Now that you’ve removed all of the unused and unneeded data columns, and have rearranged those columns so the data will export properly, you should take a look at the filters. There are probably some things you can clean up there, too.



You should remove any filter that isn’t being used. Most often, they’re the filters that end with the words “is prompted.” Those filters will only work if you were to create a dashboard prompt.

To remove those unnecessary filters, hover your mouse pointer over the unneeded lines so that you can see the pop-up menu bar, then click the red “X” button to remove the filter.

Be sure to click the **Save** button after making your changes.

Enjoy!