TOWSON UNIVERSITY

iStrategy / Pro-Clarity

Advanced Reporting Features

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=*Shortcut* =*Advice* =*Caution*

Data Layout Tab

The Data Layout tab is where you can change the layout of an existing report and/or add different data to the report. Knowing the parts of the screen on this tab will help you manipulate the data.

Summary

Data Layout Tab

1. Rows
2. Columns
3. Background Slice / Drop-down
4. Pivot

Edit Data

1. Descendants / Name Sets
2. Remove Slices
3. Add Measures
4. Combine

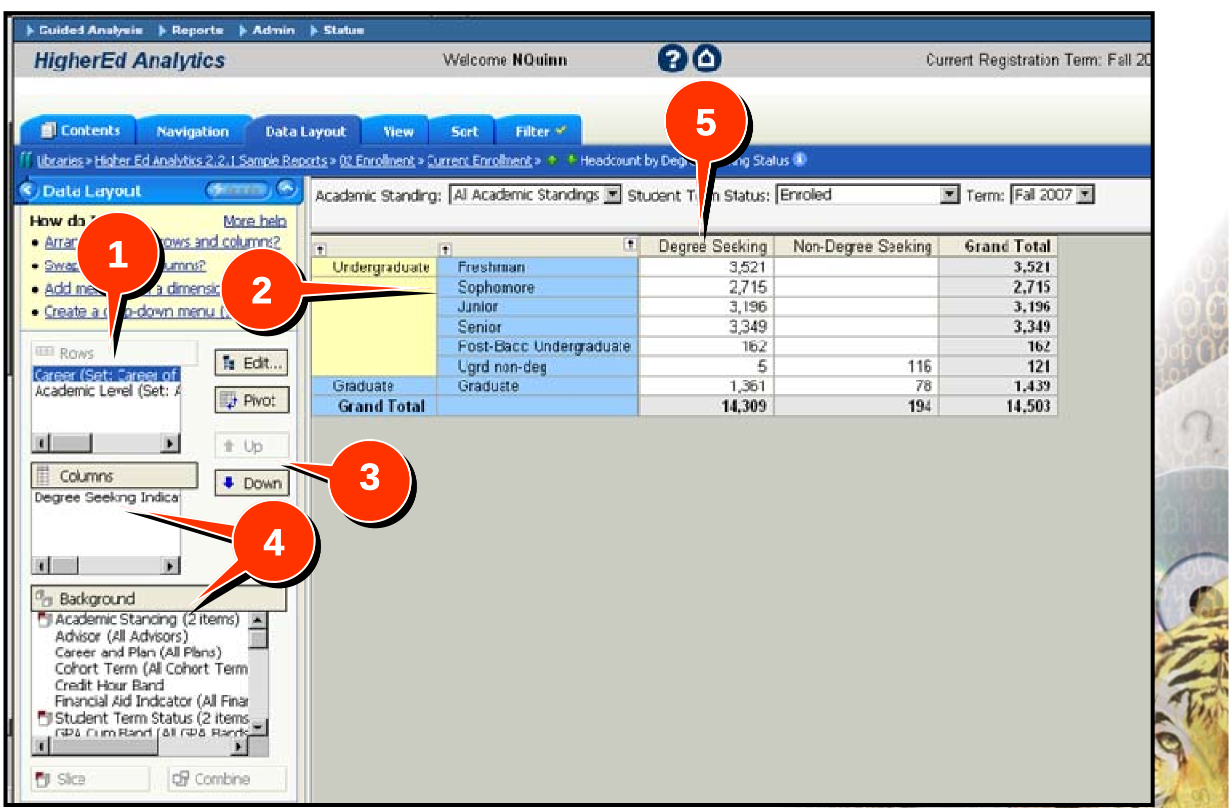
Rows:

The **Rows** area (Figure 1, 1) takes the dimension data and displays it on the horizontal area of the grid (Figure 1, 2). If you have more than one dimension in the **Rows** area you can change the order they appear in the grid by highlighting the value and using the **Up** or **Down** buttons (Figure 1, 3). To get more dimensions into the **Rows** area, highlight them in the **Background** or **Columns** area (Figure 1, 4) and use the **Up** button until the dimension is displayed in the **Rows** area.

Columns:

The **Columns** area (Figure 1, 4) takes the dimension data and displays it on the vertical area of the grid (Figure 1, 5). If you have more than one dimension in the **Columns** area you can change the order in which they appear in the grid by highlighting the value and using the **Up** or **Down** buttons (Figure 1, 3). To get more dimensions into the **Columns** area, highlight them in the **Background** or **Rows** area and use the **Up** or **Down** button until the dimension is displayed in the **Columns** area.

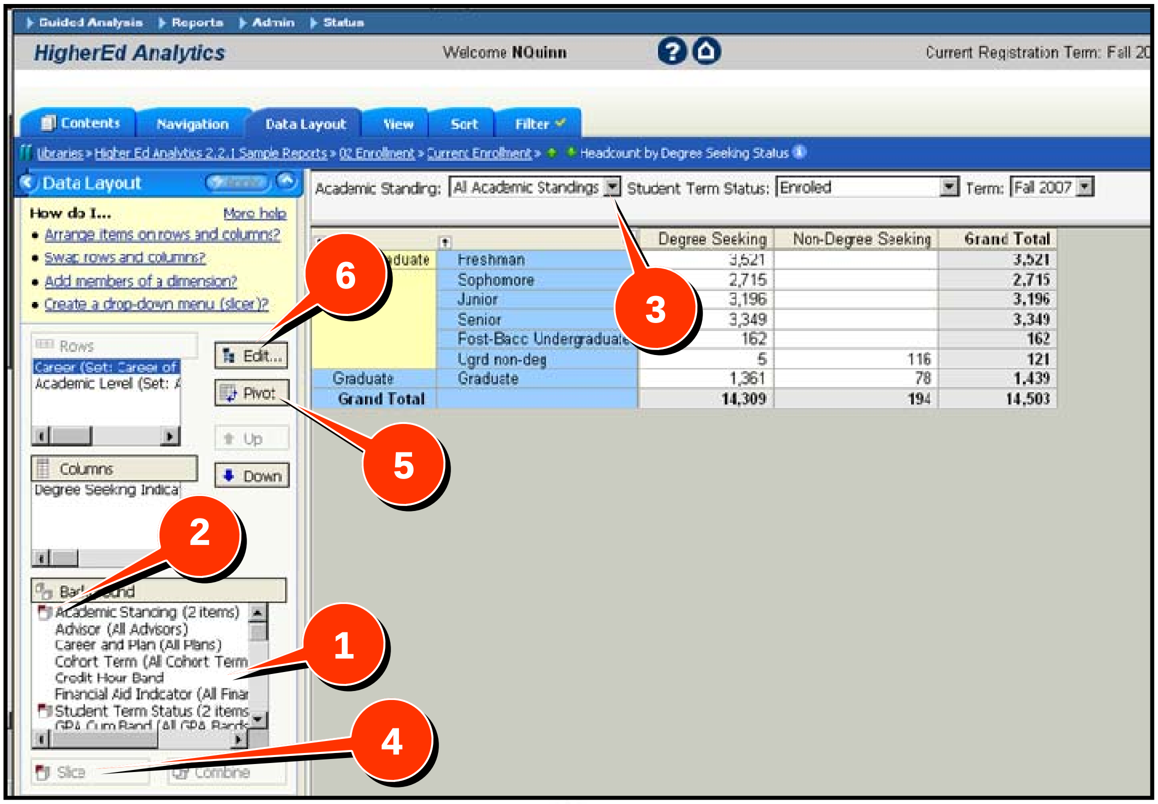
Figure 1



Background

The **Background** area (Figure 2, 1) is where all the dimensions that ***can*** be used in this report are housed. The dimensions with the **Slice** icon (Figure 2, 2) in front of them are the ones that are displaying as drop-down fields (Figure 2, 3). To add another **Slice** (drop-down field highlight the dimension and click on **Slice** (Figure 2, 4). Then click on the **Apply** button to see the changes.

Figure 2



Pivot

Select the **Pivot** button to swap the **Rows** and **Columns** in the **Grid**. The **Grand Total** field is a calculated field that will move with the **Pivot** swap and it will always keep it's pre-calculated data.

Edit Data

If you add a new dimension as a slice and you need the drop-down field to show more measures of the data you need to use the **Edit** tool.

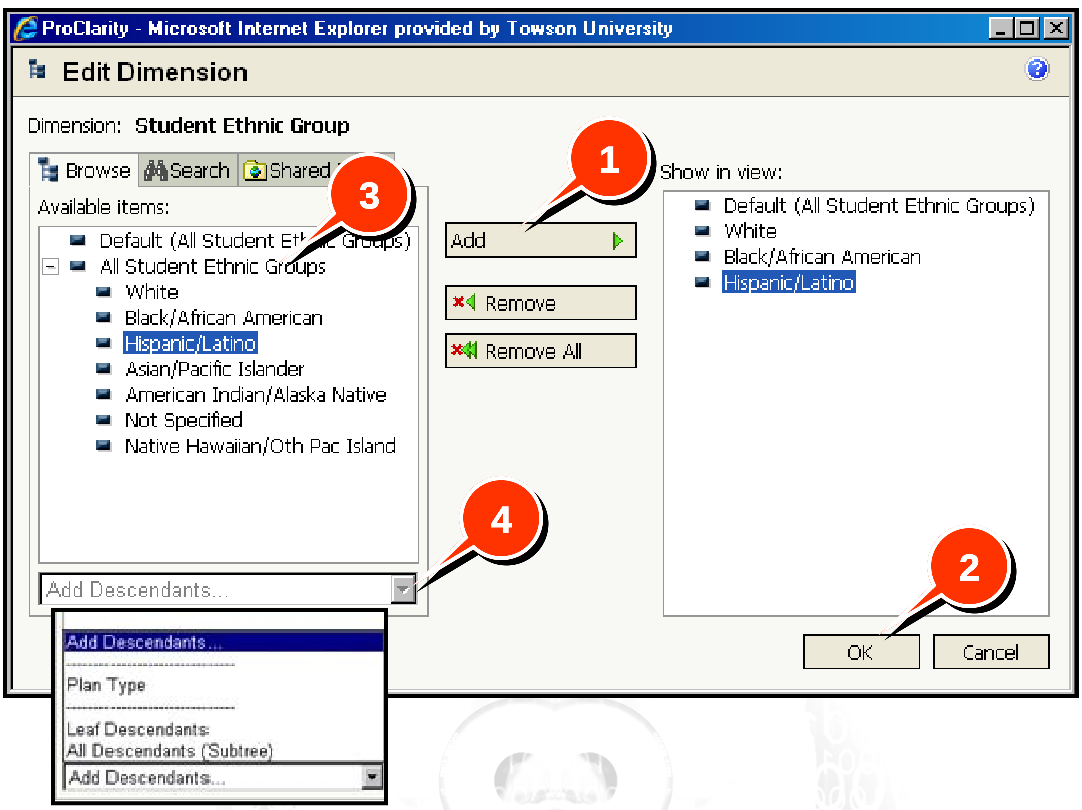
Descendants/Name Sets

1. Highlight the dimension you want to edit, and click on the **Edit** button (Figure 2, 6).
2. Click on the + sign in front of the parent dimension (Figure 3, 1). When there aren't anymore + signs you have reached the lowest level called **Leaf Descendants**.
3. From the **Available Items** window highlight the measures you want to add and select **Add** (Figure 3, 2).
4. This will move the items to the **Show in view** window.

5. If you need to remove items select them in the **Show in view** area and click on **Remove** or **Remove All.**
6. Click on **OK** (Figure 3, 2) when all the measures you want are in the **Show in view** area.
7. Your drop down menu for the dimension you edited will now contain the individual **Leaf Descendants** that you have chosen.
8. If you select a higher parent dimension (Figure 3, 3) the **Add Descendants** box (Figure 3, 4) will activate.
9. If you choose to add **Leaf Descendants** it bring all of the lowest values in the hierarchy for the dimension that you chose.
10. If you choose **All Descendants** (Subtree) it brings in all the lowest children plus any intermediate roll ups (their parent values).
11. If you choose the **Name Sets** (Career, Program, Plan, Sub-Plan, Plan Type etc…) it brings in the total for all data in the Name Set.

The **Name Set** value returns the same value every time. The **Descendants** values will change depending on the parent value you selected.

Figure 3



Remove Slices

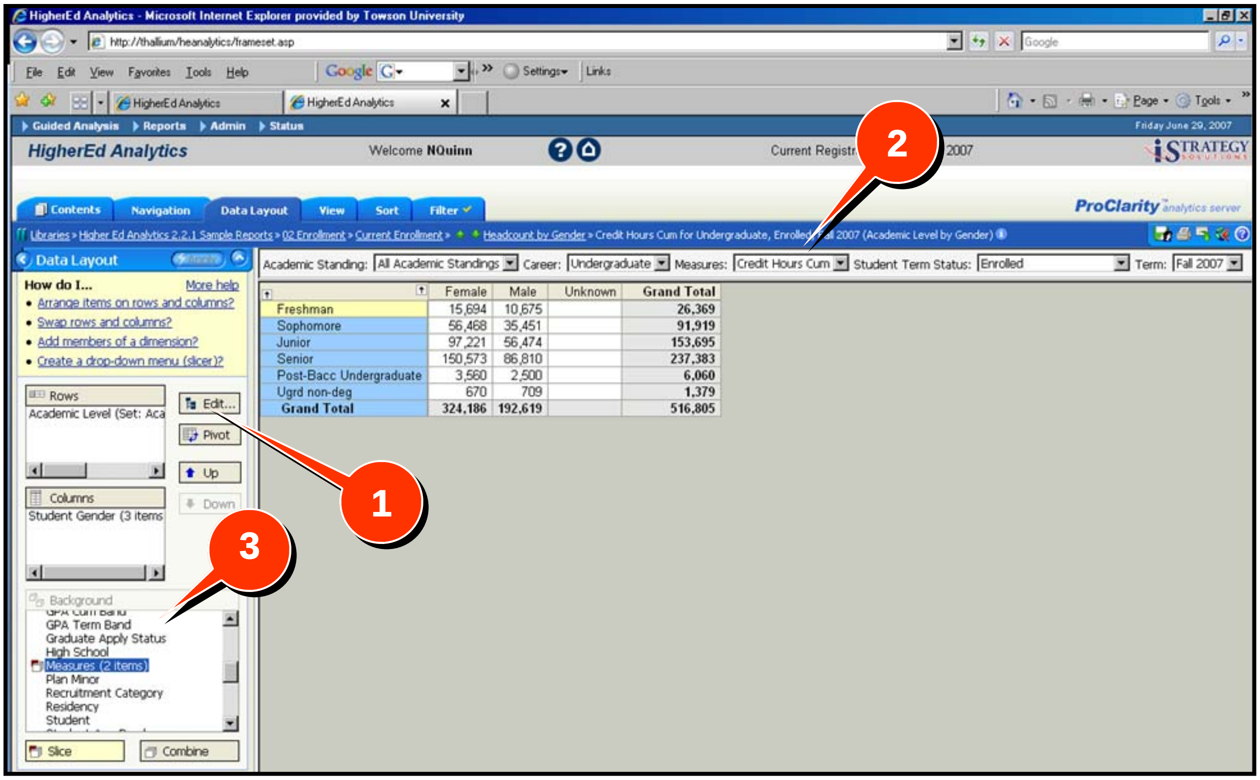
To remove a Slice, choose it from the **Background** area and click on **Edit**. Highlight and **Remove All** of the values in the **Show in view** items area. Select the **Default** value from the **Available items** list and **Add** it to the **Show in view** area.

Add Measures

From the **Background** area there is an object that starts with **Measures**, that contains all of the data areas of the report.

1. Click on the **Measures** object in the **Background** area and choose **Edit** (Figure 4, 1).
2. From the **Edit** screen add the Measures you want to the **Show in view** area.
3. The added Measure will appear in the drop down list (Figure 4, 2).
4. You can also move the Measures into the grid by moving them from the **Background** area to either the **Columns** or **Rows** area (Figure 4, 3).

Figure 4



Combine

An alternate to showing slices of data is to show the combined values, or aggregation, of selected dimensions. This feature allows you to get a sub-total of two dimensions from different areas.

1. Create a drop down menu slicer with more than one value.
2. Click the sliced item in the **Background** area, and the click the **Combine** button (Figure 4, 4).
3. Click on **Apply** (Figure 4, 5).
4. Your combined values will now appear in the grid and the drop-down menu (Slice) will disappear.