

## What is a Customized Dashboard/Report?

Dashboards are used to assist you in navigating to and running your reports. Most of Caltech’s *reports* developed in the data warehouse are actually an OBI *dashboard* with the report prompts in the top section and the resulting report in the bottom section. For the purposes of this Quick Guide we will refer to these dashboards as a *report*.

When you enter prompts on a report and then run the report, you have *customized* the report and you can save this customization for future use. In addition to prompts there are a few ways in which you can customize a report:

- Sorting the data in a column
- Excluding one or more columns from the report
- Moving columns, i.e., changing the order of the columns in the report

In the next two sections of this Quick Guide (*Prompts* and *Sorting, Excluding, and Moving Columns*) you will learn how to do these customizations. In the final section (*Saving and Applying Your Customizations*) are the steps to take in order to save and reuse your customizations.

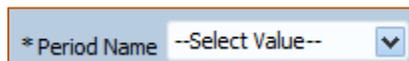
**NOTE:** Customizations may *only* be applied after you have run the report the first time upon opening it after logging in.

**TIP:** Save a default customization for the *Current Period* and a single PTA so it runs quickly. By doing this you are able to get to your list of *Saved Customizations* quickly without having to enter prompts. Name this default *ZZ Default* so it sorts to the bottom of your list.

## Prompts

Prompts help you filter on the data so you can see specific information.

1. When you first navigate to a report the prompts will be set to *--Select Value--*.
  - a. Required prompts will have an asterisk at the beginning of the prompt label, for example:



**TIP:** For reports used for monitoring accounts select *Current Period* or *Previous Period* for the Period Name.

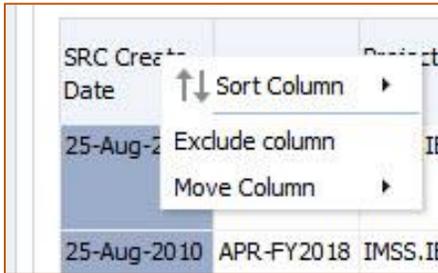
2. After selecting all the prompts that you need click on the **Apply** button to run the report.

**TIP:** Don’t enter more prompts than you need. For example, if you want to see all the PTAs associated with a single award only use the *Award #* prompt.

## Sorting, Excluding, and Moving Columns

Does the report have columns that you don't want? No problem! Are the columns not in the right order? No problem! Interested in a different sort order? No problem!

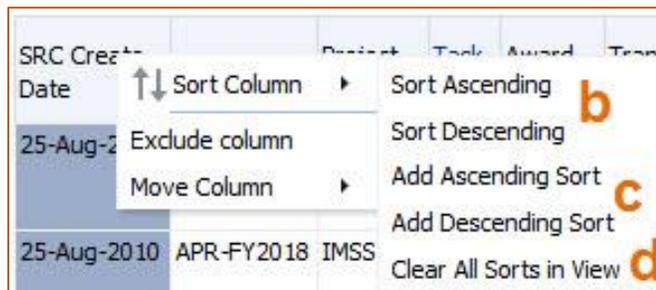
1. Run the report by applying the prompts.
2. Right clicking on a column header will bring up a menu with the modification choices.



3. There are several ways in which you can sort a column:

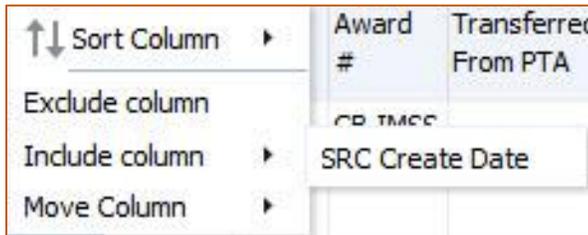
**NOTE:** Some columns have special sorts applied, e.g., the FY Period column will sort by date with most recent period first.

- a. *Ascending* sorts A-Z or 1-99 while *Descending* sorts Z-A or 99-1.
  - i. When you hover over a column header without right-clicking the sort icons (in the shape of triangles) will appear.
  - ii. The left triangle pointing up sorts *Ascending*
  - iii. The right triangle pointing down sorts *Descending*
- b. *Sort Ascending* and *Sort Descending*: Removes all existing sorts and sorts the column as selected.
- c. *Add Ascending/Descending Sort*: Adds a sort on a second (or third, etc.) after the initial *Sort Ascending/Descending*.
- d. *Clear All Sorts in View*: Removes all the sorts applied on the report.

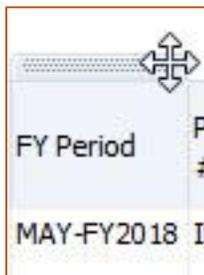


**TIP:** Be careful when applying sorts to multiple columns because both *Sort Ascending* and *Sort Descending* will remove all previously applied sorts.

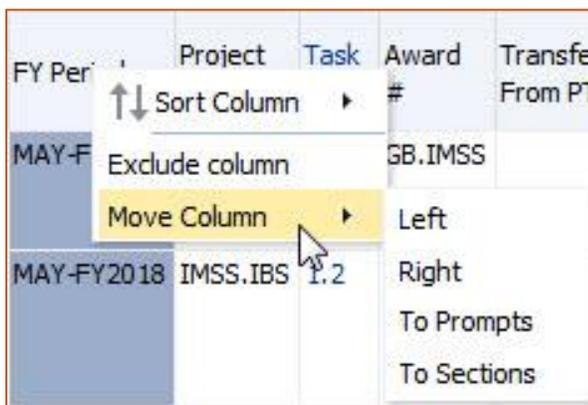
4. To remove a column from the report choose *Exclude column* from the menu.
  - a. Once you have removed a column a new option, *Include Column*, will appear.
  - b. Expanding the menu will show those columns that are available for adding back into the report.



5. You can rearrange columns in two different ways:
  - a. Hover over the column until the bar and the drag icon appear over the column. Click, hold, and drag.



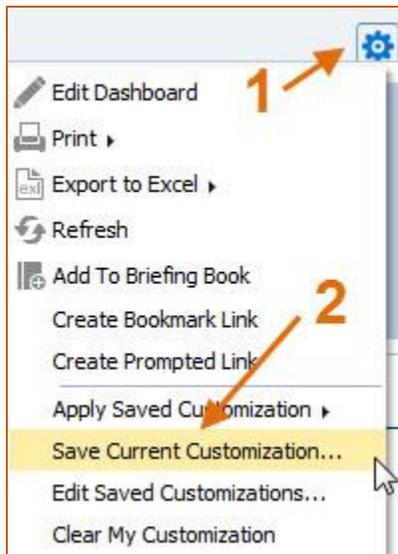
- b. Right click on the column for the menu, and select to where you want to move the column.



### Saving Your Customizations

You've designed your ideal report with just the right prompts, columns, and sorts. By saving this *customization* you can *apply* it for future use or even make it the default to run each time you go to the report.

1. After the report has run, click on the *Page Options* icon in the upper right-hand corner to activate the menu.
2. Select *Save Current Customization...* from the menu.



3. Enter the name of the customization in the **Name** field.
4. If you would like this customization to be the default each time you go to the report, then check the *Make this my default for this page* box.
5. Click on **OK** when you are done.

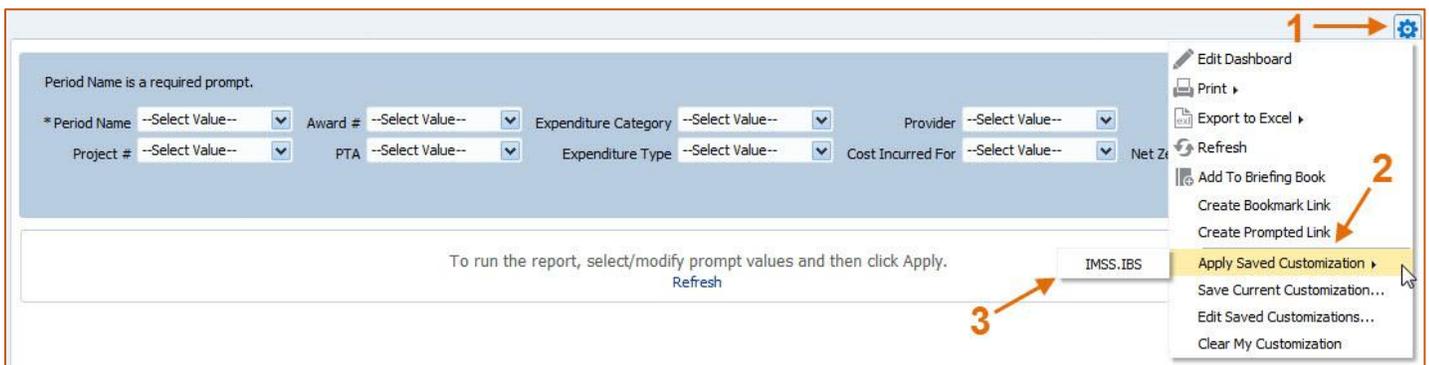


### Applying Your Customizations

After you have saved one or more customizations you can apply a customization to the report.

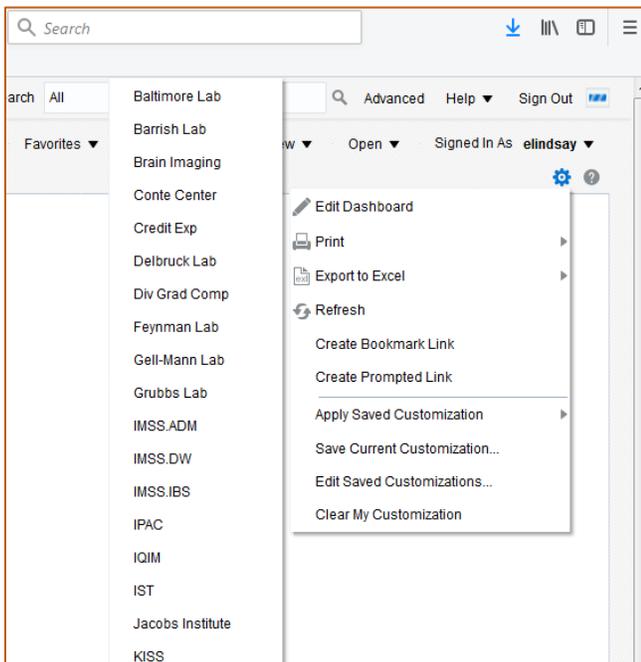
**NOTE:** Customizations can only be applied after the report has been run once upon opening and the yellow bar at the top is no longer showing.

1. Click on the *Page Options* icon in the upper right-hand corner to activate the menu.
2. Select *Apply Saved Customization*.
3. Select the customization that you wish to apply. The report will automatically begin to run upon selecting the customization.



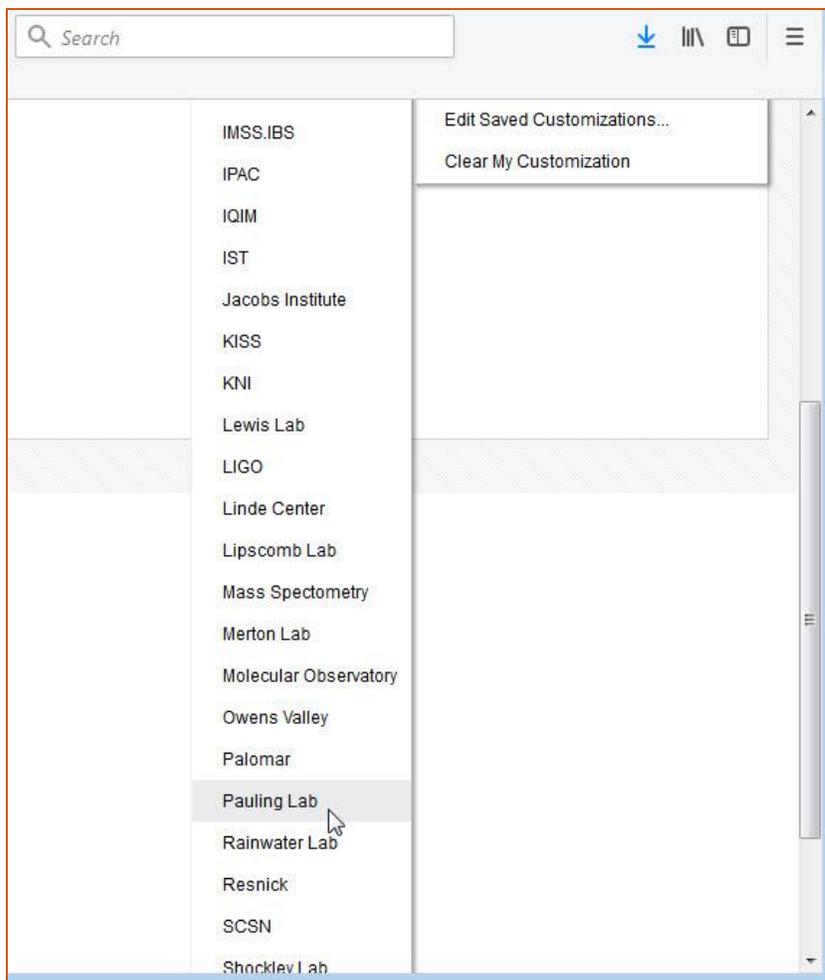
### When the List Gets Long

You've been working hard and have saved several versions of the report. The list of your saved customizations appears longer than what you can see on your screen:



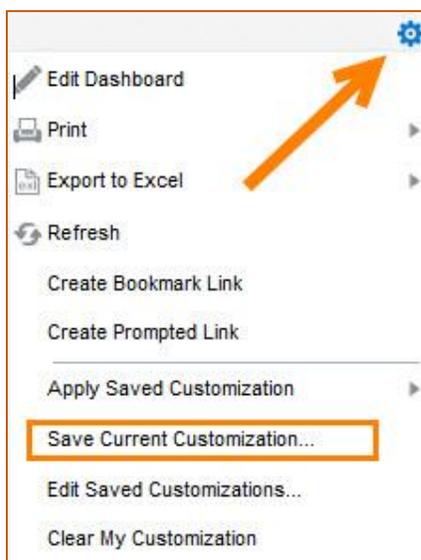
To see the full list:

1. View the list by hovering over *Apply Saved Customization*.
2. Move your cursor to the list and then scroll down with either your mouse scrolling wheel or use the down key on your keyboard.
  - a. No matter how long your list you will be able to scroll to the bottom even if it goes beyond the end of the report currently shown.

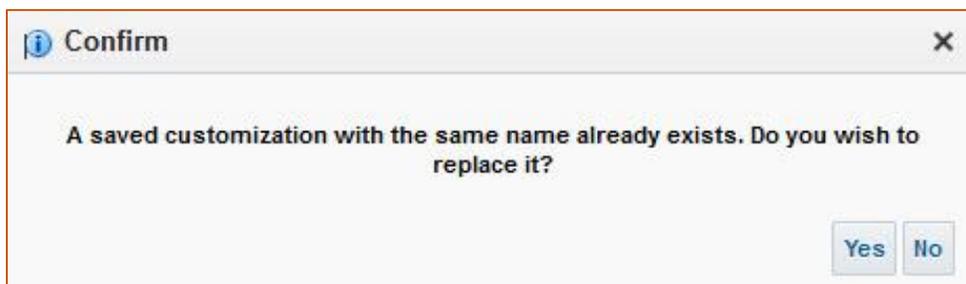


### Saving changes to a Saved Customization:

1. Run your default Saved Customization or apply your Saved Customization to a dashboard.
2. Make updates to your prompts, sorts, column order etc.
3. Click the Page Options wheel and select *Save Current Customization...*



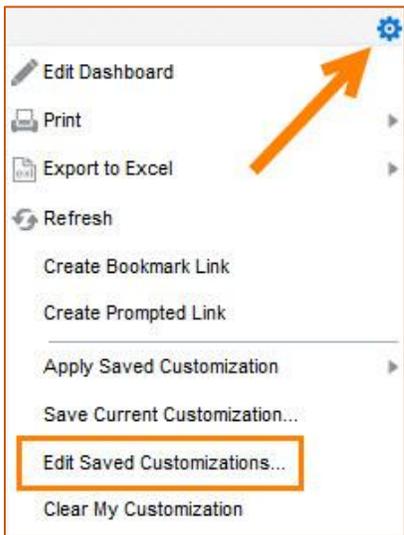
4. Type the exact same name as your current customization. You will receive the message *A saved customization with the same name already exists. Do you wish to replace it?* Select *Yes* and this will update the saved customization with your changes.



### Editing Saved Customizations

This window allows you to change the name of your saved customizations and update which customization is saved as your default.

1. Select the Page Options wheel and *Edit Saved Customizations...*



2. You can change the name of your Saved Customization or update which Customization is your default.

