TOWSON UNIVERSITY

iStrategy / Pro-Clarity

Reporting Basics

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=Shortcut =Advice =Caution

Accessing Pro-Clarity Reports

1. From your Web browser type depending on your role type in:
   For Reporters: http://thallium/pas/en/src/Proclarity.asp
   For Administrators: http://thallium/heanalytics/frameset.asp
2. Click on the **Reports** menu (Figure 1, 1).
3. In the Libraries section click on the **Higher Ed Analytics 2.2.1 Sample Reports** link (Figure 1, 2).
4. This will bring up a series of **Books** (Figure 1, 3).
5. When you click on a **Book** this will open a series of **Folders** (Figure 1, 4).

6.When you click on the **Folders** you will see the individual **Reports** (Figure 1, 5).

Summary

Pro-Clarity Reports

1. Accessing
2. Basic Report Tools
3. Basic Report Layout
4. Report Drilling
5. Hide or Show Only
6. Sort Tab
7. View Tab

Figure 1

Basic Report Tools

There are different tabs on the HigherEd Analytic Reports page: **Contents**, **Navigation**, **Data Layout**, **Views**, **Sort**, and **Filter** (Figure 1, 1). Other tools exist for the basic report layout which include: **Icons**, a "**How do I**" link for FAQ, a **Breadcrumb** trail and a **View Information** window.

Navigation Tab

The **Navigation** tab allows for an **Expand Mode**, **Drill Down** feature, and **Drill to Detail.**

Content Tab

The **Content** tab allows you to navigate to different reports, books, or libraries.

Data Layout Tab

The **Data Layout** tab controls the rows, columns and background of each report. This is an advanced feature and will be covered in the Advanced Report document.

View Tab

The **View** tab allows users to see a Grid, Chart or combination Grid/Chart Report.

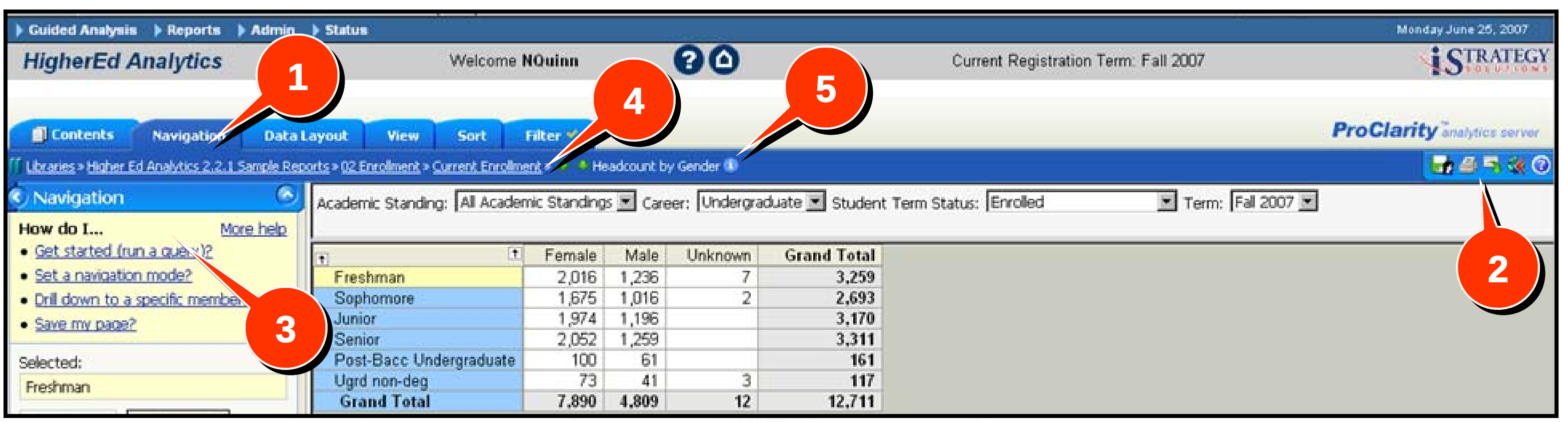
Sort

The **Sort** tab allows for sorting and ranking of the data based on values of data (not alphabetically).

Filter

The **Filter** tab allows you to suppress rows that don't have data by using the Hide Empty Rows feature. It has a ranking and selection of data feature that will be described in the Advanced report document.

Figure 1



Icons:

There are four icons at the top right of the page (Figure 1, 2) which allow you to do the following functions:

- **Save to My Views**: Any report that you build or is part of the library can be customized and saved to the My Views area.
- **Printing**: Any report can be printed out.
- **Export to Excel:** Parts of reports can be exported out to Excel.
- **Web Professional Tool**: This is an Administrative tool for Admins who need to publish reports.

- **Help**: There is searchable Help feature organized by content that includes a full glossary.

How do I…

Each tab has it's own "**How do I…**" section (Figure 1, 3) with the most frequently asked questions for that tab.

Breadcrumb Trail

As you navigate within Pro-Clarity a breadcrumb marks your location at the top of the page (Figure 1, 4). Use this tool for quick click navigation to get back to the original report or different versions of your manipulated reports.

View Information Window

The **View Information** icon found at the end of the Breadcrumb trail (Figure 1, 5) is a summary of the report you are currently viewing as you make refinements (Figure 2).

Figure 2

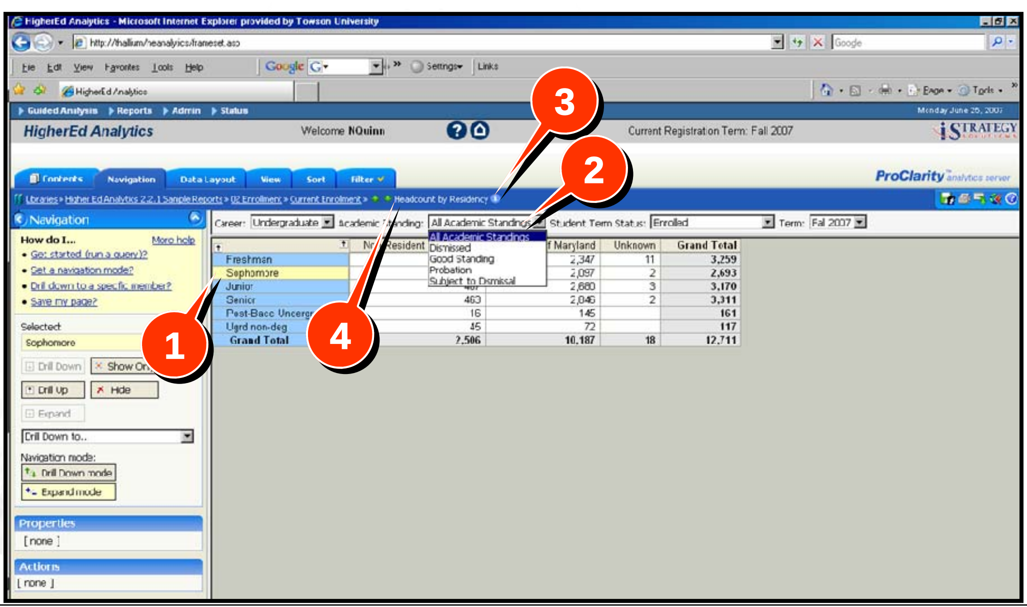
Basic Report Layout

Dimension options on the **Navigation** tab help to further define your report

- You can either click on the dimensions within the report itself (Figure 3, 1) or from the drop-down list of the menu items (Figure 3, 2).
- As you choose to refine your data the Information View (Figure 3, 3) will remind you of the report that is currently being defined and manipulated.
- To get back to the original non-refined report simply click on the area in the Breadcrumb trail with the original report name (Figure 3, 4).

Note: Changing one value in a drop down box doesn't reset the values in the other drop-down boxes.

Figure 3



Report Drilling

The three ways to drill for information on a report are: Drill up and down a hierarchy, Drill to another dimension and Drill to Detail.

Drill Up and Down a Hierarchy

A Hierarchy can be viewed as an organization chart with a parent child relationship. You can navigate up and down a hierarchy. There are two modes for this: **Expand/Collapse Mode** and **Drill Down Mode.**

- **Expand or Collapses Mode** (Figure 4, 1): uses the + (plus) and - (minus) sign to expand or collapse one level at a time starting with the parent and drilling down (Figure 4, 2) (Shows the children and related parents).
- **Drill Down or Drill Up Mode** (Figure 5, 1): uses the up or down arrow to drill on information and it will show only the children of the field you drill down on (Figure 5, 2).

Figure 4

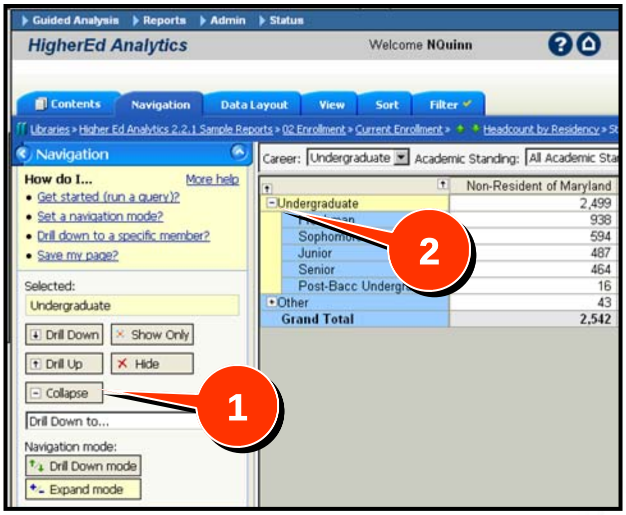
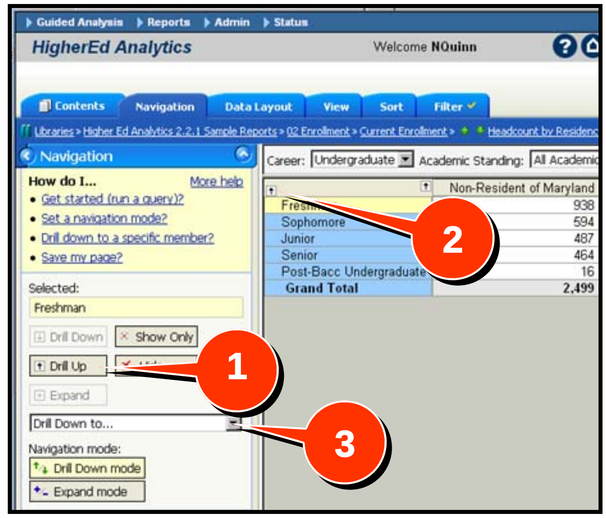


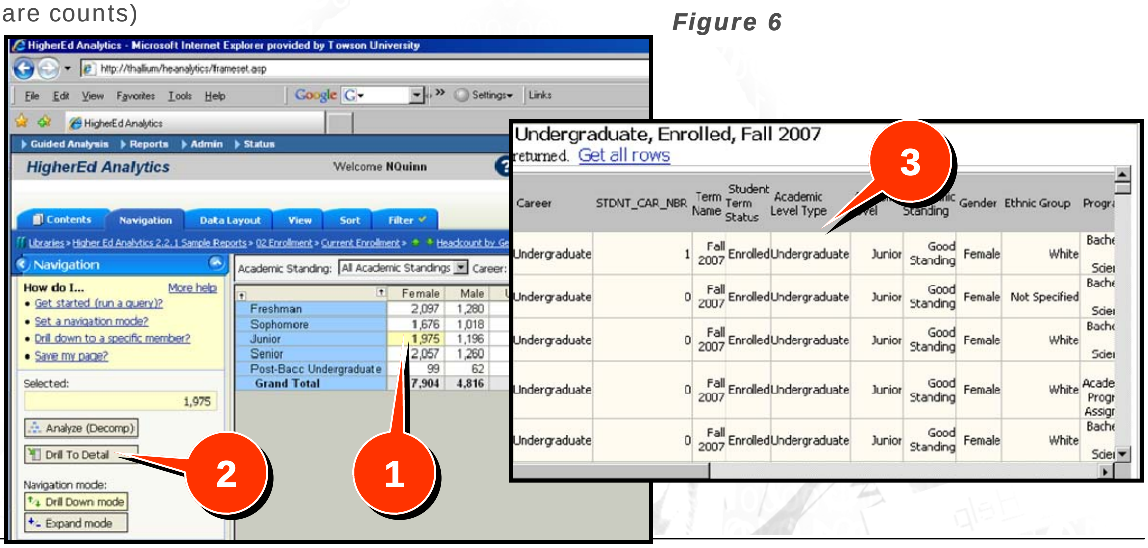
Figure 5



- **Drill To Another Dimensions**: Used to include additional information on a report. Uses the **Drill Down To** drop down to choose other dimensions and break outs (Figure 5, 3).
- **Drill To Detail**: Click on the specific field (Figure 6, 1) and choose the **Drill to Detail** link (Figure 6, 2), to get a worksheet of the underlying data for this field (Figure 6, 3).

You can only drill on measures that are not calculated fields in the system. (Only items that are counts)

Figure 6

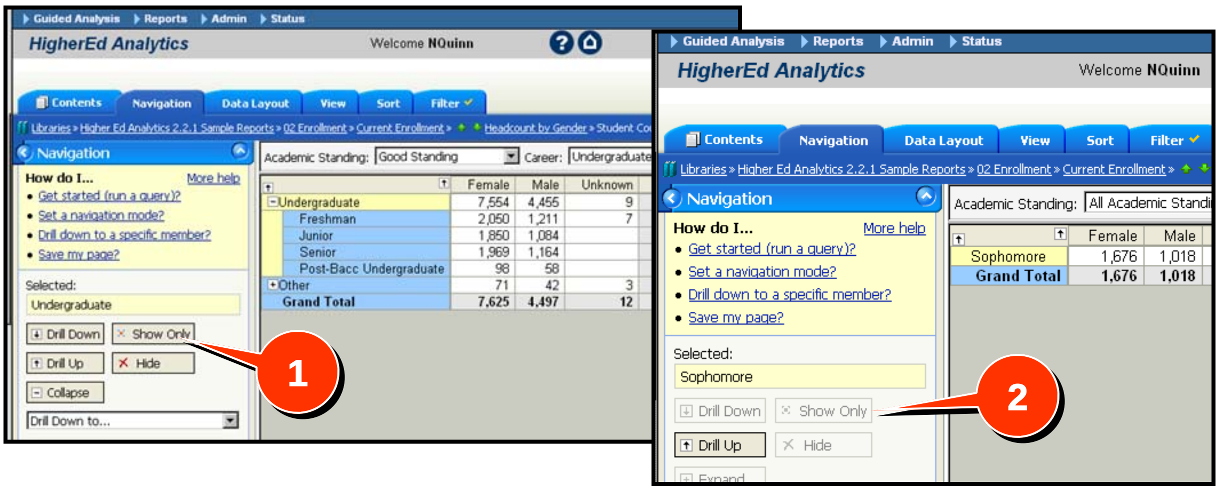


Hide or Show Only

- **Hide**: Select a dimension (In Figure 8 we selected the **Sophomore** dimension), and click the **Hide** button (Figure 8, 1) to hide it.
  Note: The Undergraduate total will still be the same, you are just hiding one of the fields that makes up the total.

- **Show Only**: Select a dimension (In Figure 8 we selected the **Sophomore** dimension), and click the **Show Only** button (Figure 8, 2) to show just that row of data.

Figure 8

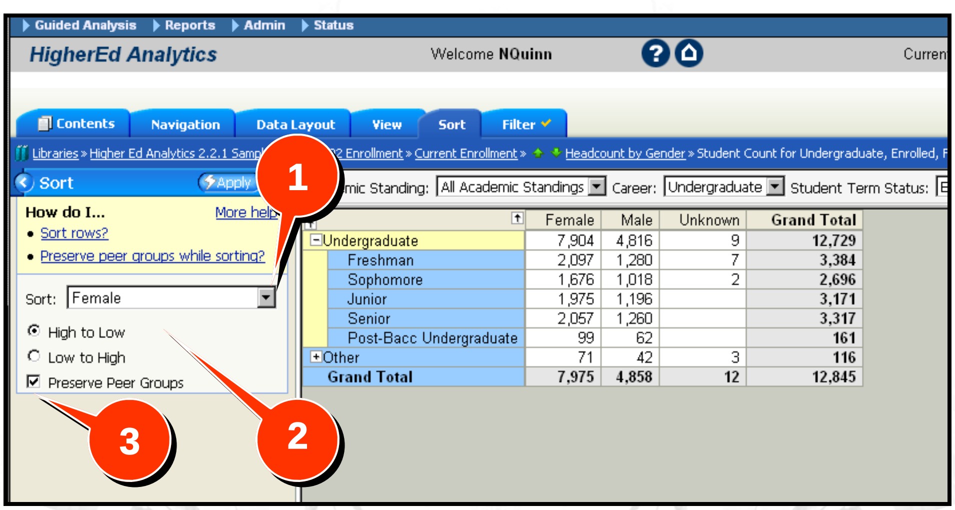


Sort Tab

The Sort tab allows the user to sort data based on the data contained in the report.

1. Use the **Sort** drop down (Figure 9, 1) to base your sort on the available data.
2. Choose to see the data from **High to Low** or **Low to High** (Figure 9, 2).
3. The **Preserve Peer Groups** (Figure 9, 3) should be checked to keep the hierarchy parent values at the top.

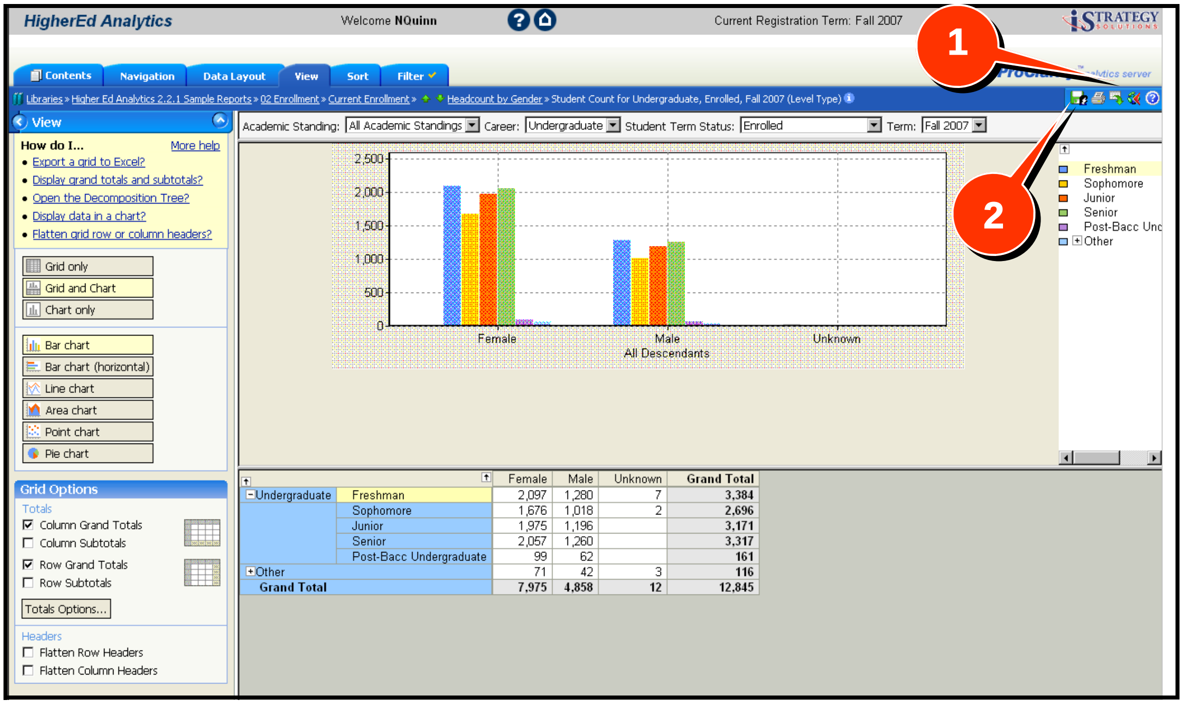
Figure 9



View Tab

The **View** Tab shows data as a **Grid Only**, a **Grid and Chart** or **Chart Only** (Figure 10).

Figure 10



Export to Excel

Use the **Export to Excel** icon (Figure 10, 1) to open up a **static** view of your data in Excel (this view won't have an interactive link back to your data).

My Views

Use the **Save to My Views** icon (Figure 10, 2) to save the report in you're **My Views** area found off the **Content** tab (Figure 11).

Figure 11