

***Insight:* Using Reports and Dashboards**



May 2013

Agenda

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Insight: Using Reports and Dashboards Overview

Insight: Using Reports and Dashboards provides an overview of *Insight*, the National Finance Center's business intelligence solution that provides integrated data and flexible analytics to drive strategic business decisions.

Insight: Using Reports and Dashboards Objectives

By the end of this course, participants will be able to:

- Describe the purpose of *Insight* as a reporting and analytics solution
- Describe how data, reports, and dashboards are structured in *Insight*
- Identify key features of *Insight's* basic navigation
- Demonstrate how to access, run, and export reports and dashboards

Session Expectations and Ground Rules



Sign the attendance sheet



Share your knowledge,
experience and ideas



Feel free to ask
questions



Use the “Parking Lot” to
revisit discussion topics



Be respectful of other
participants



Give helpful feedback



Keep us on schedule
with timely returns from
breaks



Turn off your cell phones
and refrain from checking
email

Introductions

Please introduce yourself, providing the following information:

- Name
- Organization or Agency
- Description of position
- Fun fact about yourself

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Insight Overview

Insight Overview

This chapter will review the purpose of *Insight* and how *Insight* provides users with advanced reporting and business intelligence capabilities.

Insight Overview Objectives

By the end of this chapter, you will be able to:

- Describe *Insight* and the value it provides for strategic reporting and decision making
- Identify the data sources available within *Insight*
- Describe *Insight* security and access

***Insight:* Business Intelligence Delivered**

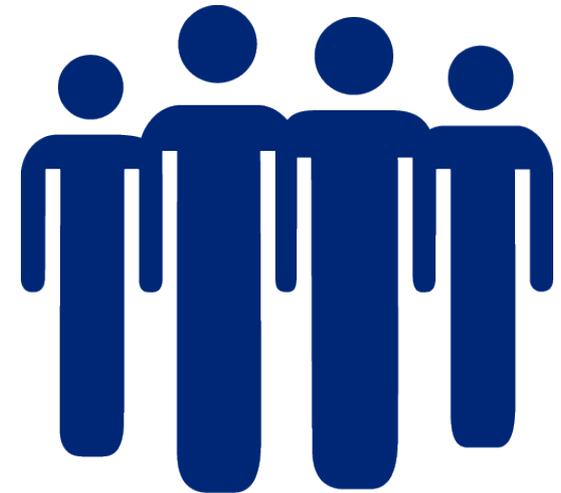
View an introduction of *Insight* at:

[https://www.nfc.usda.gov/Insight/images/Insight-
At_A_Glance.swf](https://www.nfc.usda.gov/Insight/images/Insight-At_A_Glance.swf)

Exercise 2.1: Reporting Discussion

Instructions: In groups of three, discuss the following questions and be prepared to share with the group.

- What is your role in running or creating reports?
- What reports do you run or create most often?
- Are there instances in which you would like to have several reports that you run in one place?
- What are some trends or reports that your managers would want to see over time?



Purpose of *Insight*

What is *Insight*?

Insight is an enterprise-wide data warehouse and reporting solution with advanced reporting and business intelligence capabilities.

How does *Insight* work?

Insight enables customers to make data-driven strategic decisions by providing a full range of functions from operational reporting to executive dashboards and predictive analytics.

- Integrated data warehouse allows users to see data in a consolidated view
- Common reports serve as templates for users to customize to specific needs
- Ad hoc reporting enables users to build reports tailored to unique requirements
- User-friendly functionality results in increased efficiency in report creation

What's in it for me?

Insight is a cutting-edge solution that is accurate, reliable, and agile. System functionality eases reporting whether a user is running an existing report, responding to ad hoc reporting requests, or using reports for strategic planning.

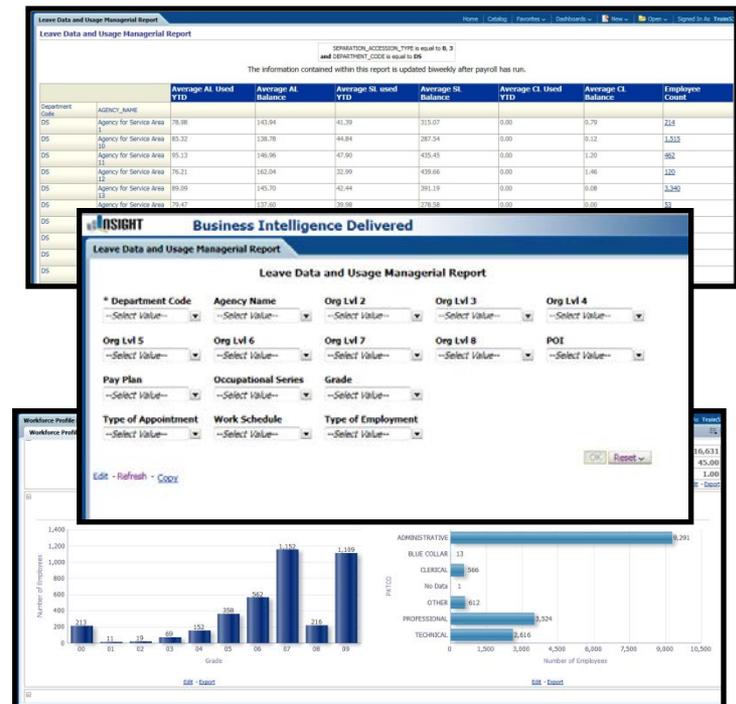
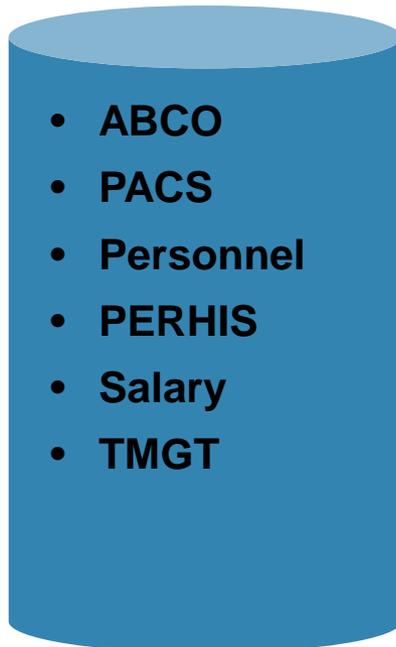
How *Insight* Works

Insight combines multiple data sources in one reporting application so users can view data in new ways and engage in strategic reporting.

Data Sources

Integrated Within *Insight*

User Created Reports



Insight's integrated data warehouse enables users to build reports and dashboards with data from the following sources:

Data Source	Description
Administrative Billings and Collections System (ABCO)	ABCO provides billings for administrative accounts receivable and provides internal accounting control and reporting.
Payroll Accounting System (PACS)	PACS provides biweekly net salary payroll data for salary payments and employee leave after the Pay Computation System (PAYE) runs. It also provides Time & Attendance data for an employee (Note: Equivalent to PAYTA in FOCUS).
Personnel	Personnel contains employee profile information and processed personnel actions such as transfer, promotion, accession, performance appraisals, etc. (Note: Equivalent to PAYPERS in FOCUS).
Personnel History (PERHIS)	PERHIS contains historical payroll and personnel information.
Salary	Salary provides the payroll actions processed each pay period (Note: Equivalent to PAYPERS in FOCUS).
Table Management (TMGT)	TMGT provides table records (reference data) containing selected data elements from the payroll/personnel, financial, and administrative systems.

Security in *Insight*

Insight security and access protocols provide tailored access to data based on Agency Security Officer (ASO) approved authorization. This influences:

Whose data you can see

- **Organization level:** Department, Agency; Available Organization levels 2-8
- **Personnel Office Indicator:** Department, Agency, POI



What data you can see

- **Sensitive Information:** e.g., SSN, Disability, ERI, etc.
- **Non-sensitive Information:** e.g., OCC Series, Hire Effective Date, etc.

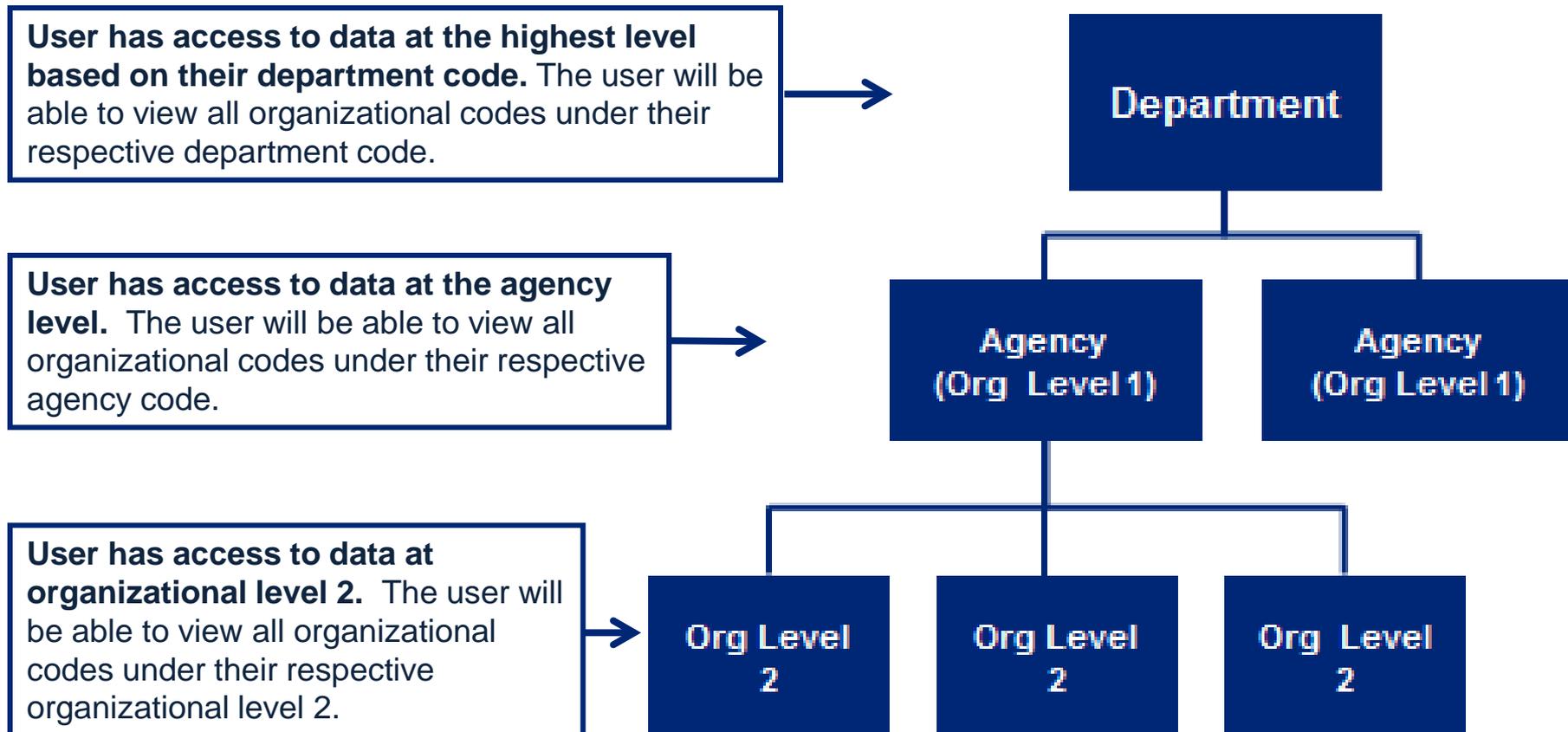


What you can do in *Insight*

- ***Insight* Consumer:** Run existing reports and dashboards, and edit dashboards
- ***Insight* Author:** Run existing reports and dashboards, edit and create new reports and dashboards using ad hoc functionality, manage permissions for saved folders

Security and Access: Org Level

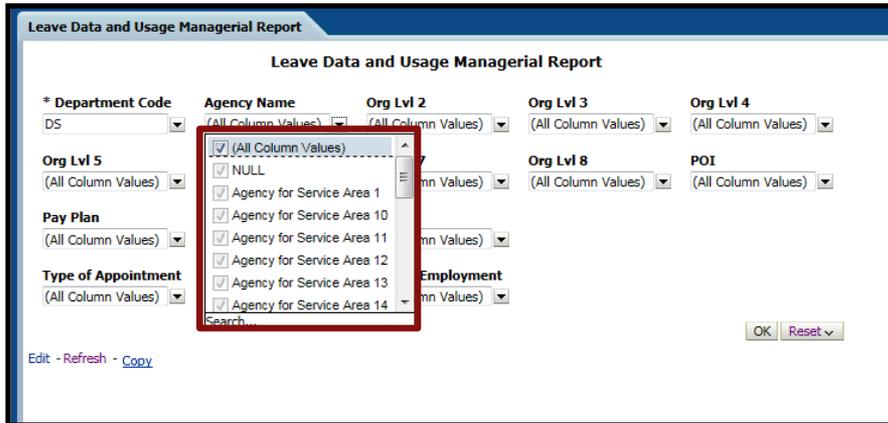
Insight tailors users' view of data based on the level of the organization (e.g., department, agency, etc.) they have access to.



Security and Access: Org Level (cont'd)

Access at the Department Level

Access at the Agency Level



Leave Data and Usage Managerial Report

* Department Code: DS

Agency Name: (All Column Values)

Org Lvl 2: (All Column Values)

Org Lvl 3: (All Column Values)

Org Lvl 4: (All Column Values)

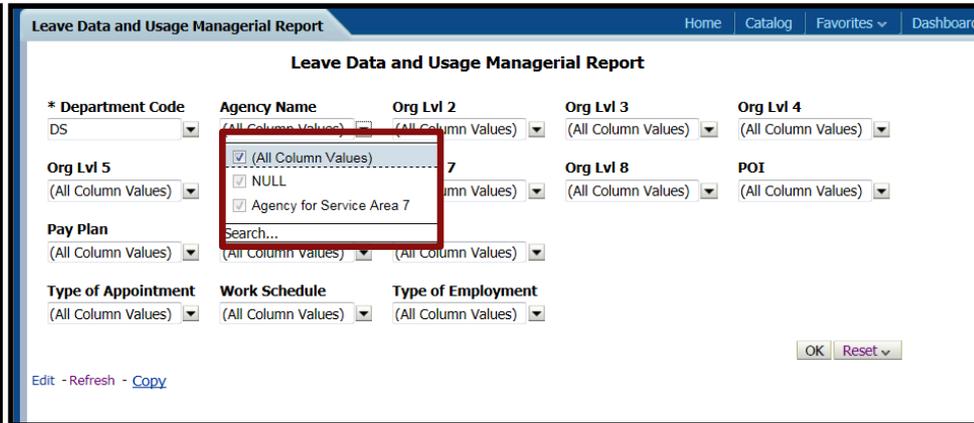
Org Lvl 5: (All Column Values)

Pay Plan: (All Column Values)

Type of Appointment: (All Column Values)

Agency Name dropdown options: (All Column Values), NULL, Agency for Service Area 1, Agency for Service Area 10, Agency for Service Area 11, Agency for Service Area 12, Agency for Service Area 13, Agency for Service Area 14

Buttons: OK, Reset



Leave Data and Usage Managerial Report

* Department Code: DS

Agency Name: (All Column Values)

Org Lvl 2: (All Column Values)

Org Lvl 3: (All Column Values)

Org Lvl 4: (All Column Values)

Org Lvl 5: (All Column Values)

Pay Plan: (All Column Values)

Type of Appointment: (All Column Values)

Work Schedule: (All Column Values)

Type of Employment: (All Column Values)

Agency Name dropdown options: (All Column Values), NULL, Agency for Service Area 7

Buttons: OK, Reset

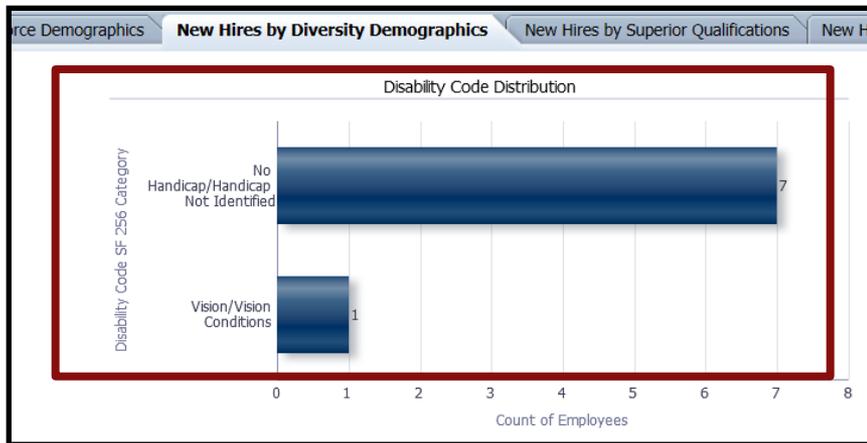
Report prompts provide users with all org levels within the department.

Report prompts provide limited org levels for a specific agency.

Security and Access: Sensitive Information

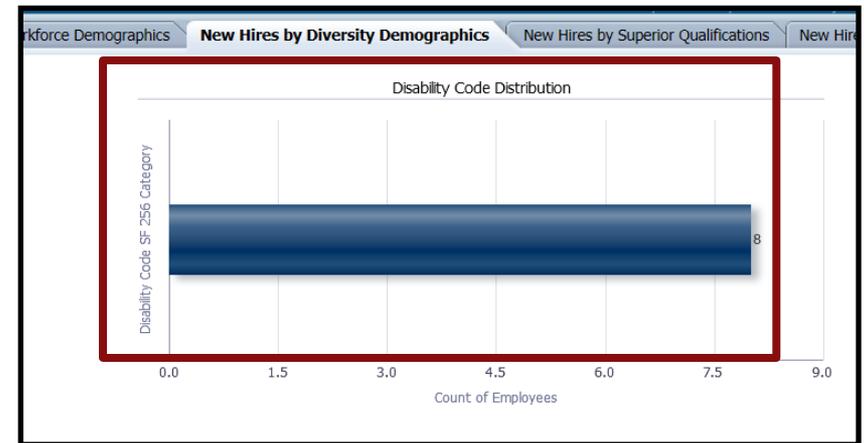
Users' tailored access to sensitive information impacts the view of common reports and dashboards and what data is visible in ad hoc.

Access to Sensitive Information: Common Report/Dashboard



Dashboard populates with sensitive information.

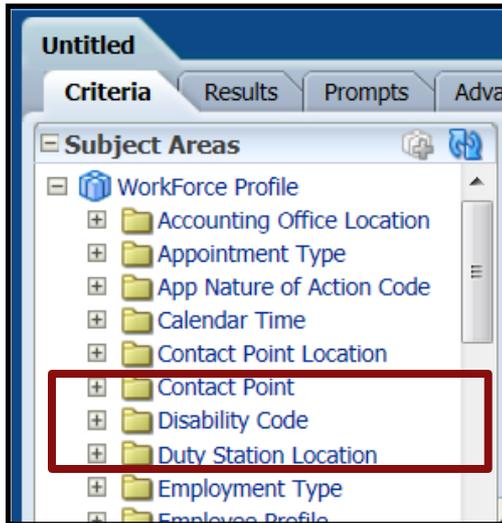
No Access to Sensitive Information: Common Report/Dashboard



Dashboard summarizes data to mask sensitive information.

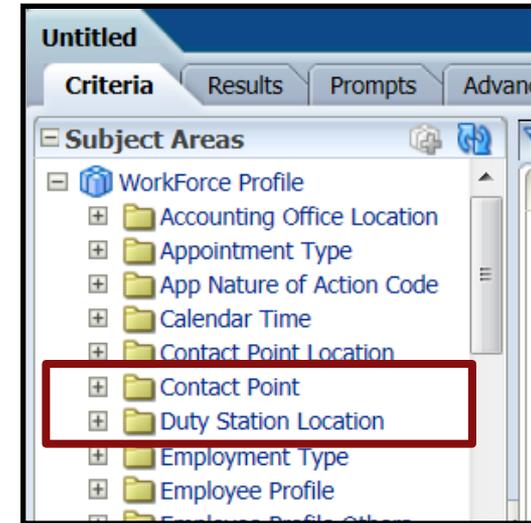
Security and Access: Sensitive Information (cont'd)

Access to Sensitive Information: Ad Hoc Environment



Users have access to sensitive information in the ad hoc environment.

No Access to Sensitive Information: Ad Hoc Environment



*Users **do not** have access to sensitive information in the ad hoc environment.*

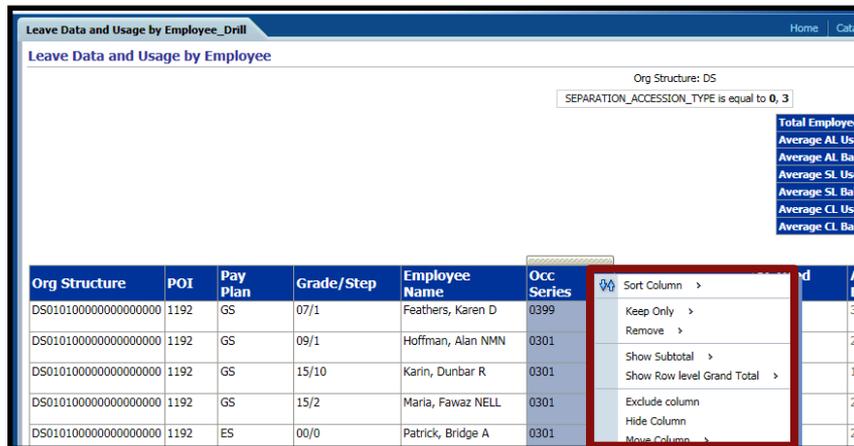
Security and Access: Role

The *Insight* Consumer and *Insight* Author roles tailor the actions a user can take in the application.

Actions	<i>Insight</i> Consumer	<i>Insight</i> Author
Access Common Reports	✓	✓
Access Common Dashboards	✓	✓
Edit Common Reports		✓
Edit Common Dashboards	✓	✓
Create Ad Hoc Reports		✓
Create Ad Hoc Dashboards		✓
Save to My Folders	✓	✓
Save to Shared Folders		✓

Security and Access: Role

Insight Consumer Role: Running Reports

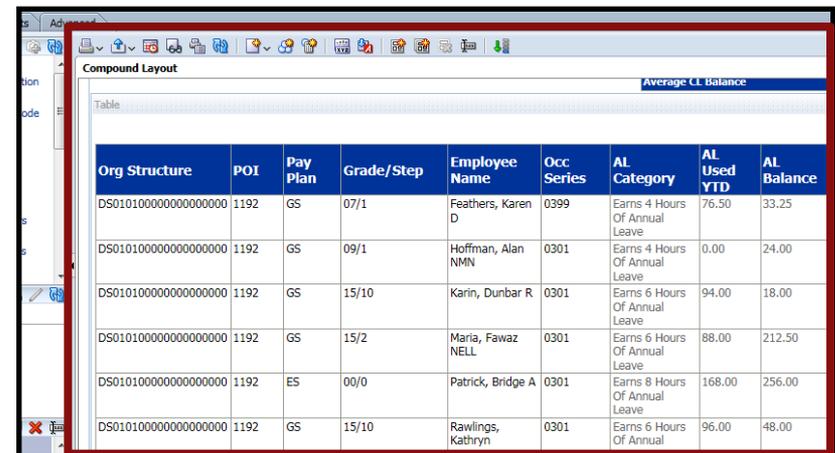


Org Structure: DS
SEPARATION_ACCESSION_TYPE is equal to 0, 3

Org Structure	POI	Pay Plan	Grade/Step	Employee Name	Occ Series	AL Used YTD	AL Balance
DS01010000000000000000	1192	GS	07/1	Feathers, Karen D	0399	76.50	33.25
DS01010000000000000000	1192	GS	09/1	Hoffman, Alan NMN	0301	0.00	24.00
DS01010000000000000000	1192	GS	15/10	Karin, Dunbar R	0301	94.00	18.00
DS01010000000000000000	1192	GS	15/2	Maria, Fawaz NELL	0301	88.00	212.50
DS01010000000000000000	1192	ES	00/0	Patrick, Bridge A	0301	168.00	256.00
DS01010000000000000000	1192	ES	00/0	Patrick, Bridge A	0301	96.00	48.00

Users can make minor changes to the appearance of a report.

Insight Author Role: Running Reports

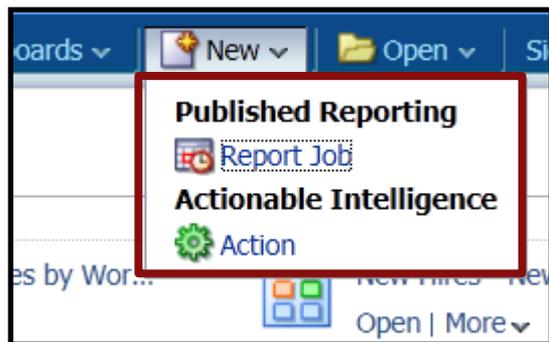


Org Structure	POI	Pay Plan	Grade/Step	Employee Name	Occ Series	AL Category	AL Used YTD	AL Balance
DS01010000000000000000	1192	GS	07/1	Feathers, Karen D	0399	Earns 4 Hours Of Annual Leave	76.50	33.25
DS01010000000000000000	1192	GS	09/1	Hoffman, Alan NMN	0301	Earns 4 Hours Of Annual Leave	0.00	24.00
DS01010000000000000000	1192	GS	15/10	Karin, Dunbar R	0301	Earns 6 Hours Of Annual Leave	94.00	18.00
DS01010000000000000000	1192	GS	15/2	Maria, Fawaz NELL	0301	Earns 6 Hours Of Annual Leave	88.00	212.50
DS01010000000000000000	1192	ES	00/0	Patrick, Bridge A	0301	Earns 8 Hours Of Annual Leave	168.00	256.00
DS01010000000000000000	1192	GS	15/10	Rawlings, Kathryn	0301	Earns 6 Hours Of Annual	96.00	48.00

Users have access to the ad hoc editing page to customize reports.

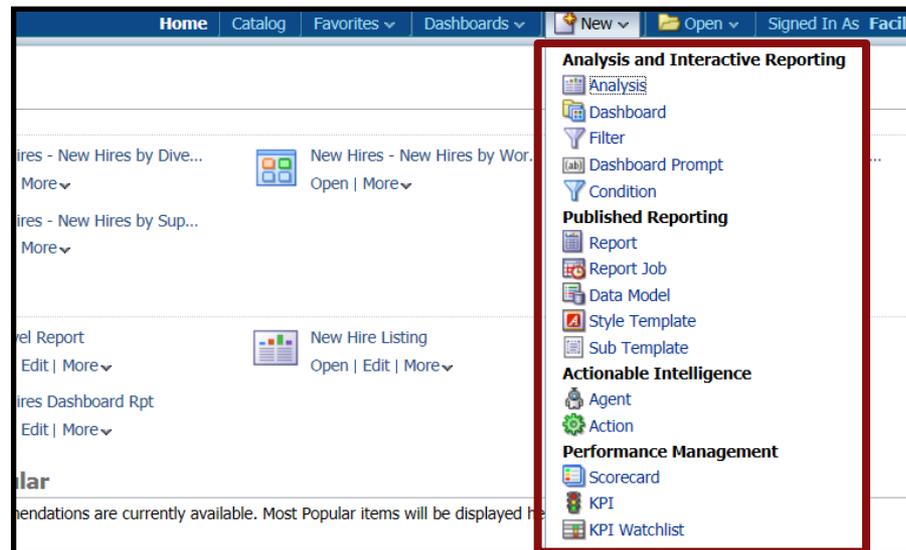
Security and Access: Role (cont'd)

Insight Consumer Role: Ad Hoc Environment



Users do not have access to the ad hoc environment to create new reports, filters, etc.

Insight Author Role: Ad Hoc Environment



Users have full access to the ad hoc environment to create ad hoc reports, dashboards, filters, prompts, etc.

Knowledge Check

1. What is one benefit of *Insight*?
 - a. Integrated data warehouse
 - b. Common reports to serve as a template
 - c. Ad hoc reporting capabilities
 - d. Increased efficiency in report creation
2. What is one data source that is currently available in *Insight*?
 - a. ABCO, PACS, Personnel, PERHIS, Salary, and TMGT
3. What are the three categories that define a user's security settings in *Insight*?
 - a. Whose data you can see (Org Level and POI)
 - b. What data you can see (Sensitive and Non-sensitive)
 - c. What you can do in *Insight* (Consumer and Author)



Insight Overview Review

Insight Overview Accomplishments

Having completed this chapter, you should now be able to:

- Describe *Insight* and the value it provides for strategic reporting and decision making
- Identify the data sources available within *Insight*
- Describe *Insight* security and access

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Understanding Data in *Insight* Overview

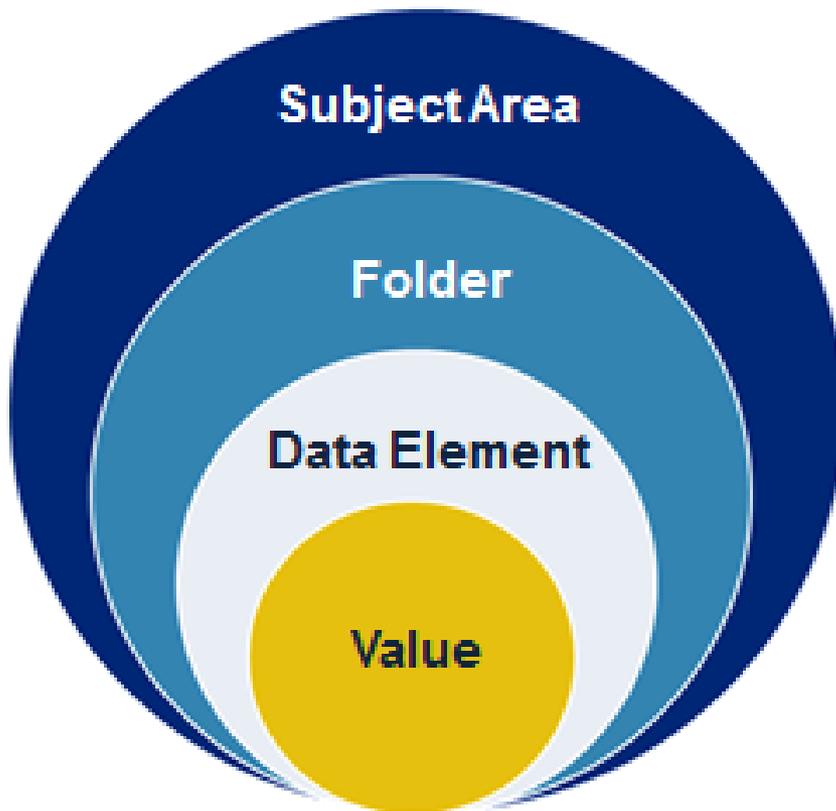
This chapter will review the way users interact with data in *Insight*, the frequency of data updates in the warehouse, and resources available to support understanding of data in *Insight*.

Understanding Data in *Insight* Objectives

By the end of this chapter, you will be able to:

- Describe how data elements are organized in *Insight*
- Describe the different types of data elements in *Insight*
- Describe the *Insight* data loading cycles
- Identify where users can access a detailed description of available data elements

Data is structured according to a hierarchy of information, from the broadest view to the most detailed view.



Subject Area

- The Subject Area is the broadest category of data.

Folder

- The Folder is a common theme by which data elements are structured in a Subject Area.
- Folders can appear within multiple Subject Areas.

Data Element

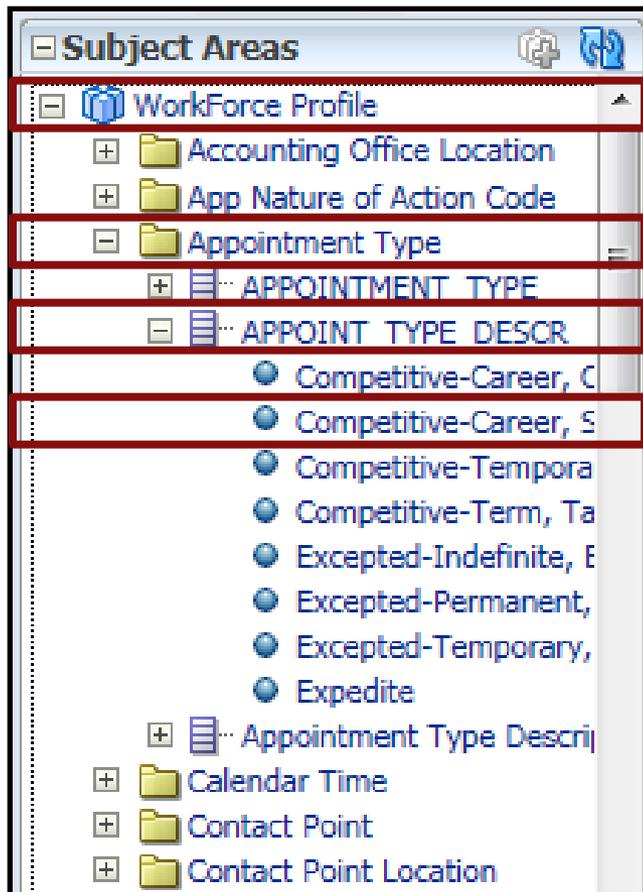
- The Data Element is the building block for reports.
- There are three different types of data elements visible within the ad hoc environment.

Value

- The Value is the individual piece of information reported for a data element.
- Values can change as data refreshes in *Insight*.

Data Structure (cont'd)

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



Subject Area: Workforce Profile

Folder: Appointment Type

Data Element: APPOINT_TYPE_DESCR

Value: Competitive-Career, SES Career

Types of Data

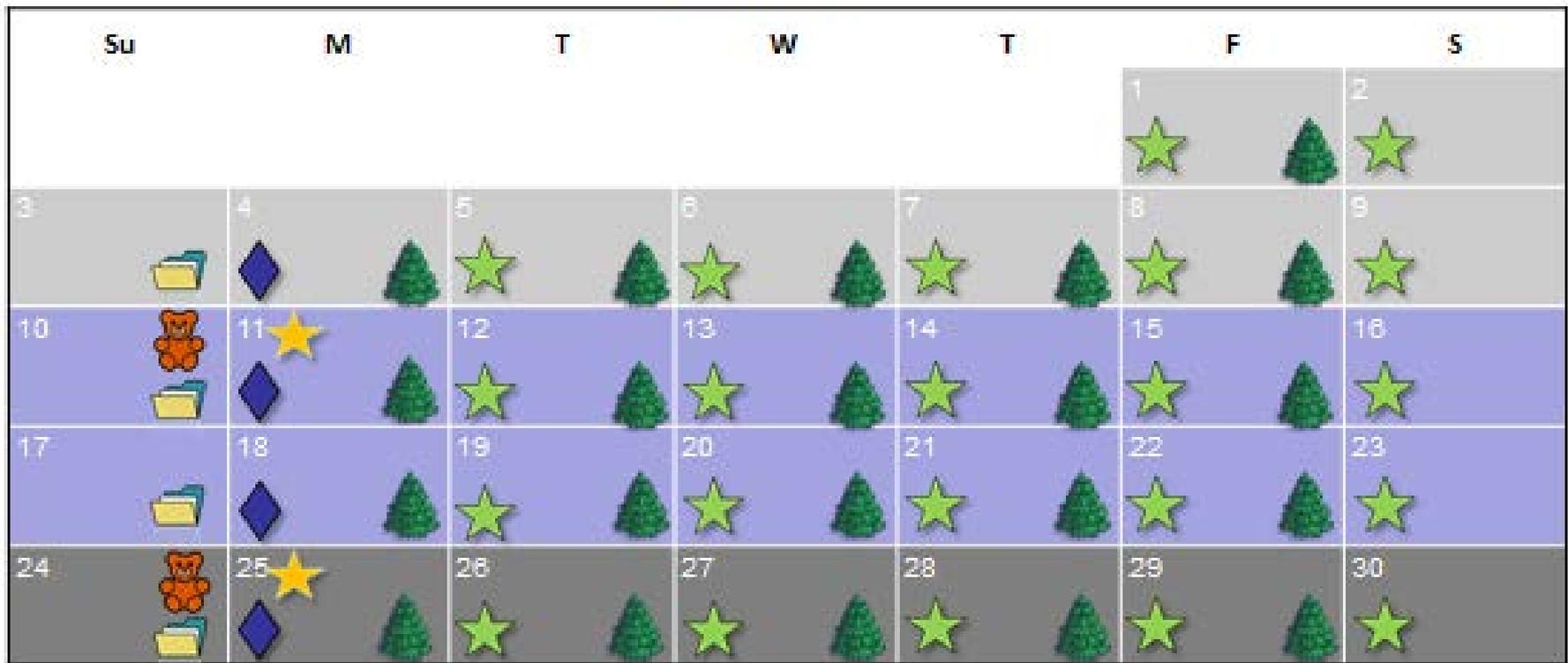
There are three types of data elements in *Insight* represented by unique icons.

Type	Description	Example	Icon
Measure	Represents numeric data values that can change based on the scenario and can be aggregated.	• Employee Count	
Hierarchy	Represents related values that allow a user to drill-down into more detailed levels of the data. <ul style="list-style-type: none"> • When users create a new report with a hierarchy data element, the report will yield a pivot table • Only one hierarchy can be used within a single report • Hierarchies should not be used as prompts 	• Location	
Attribute	Represents the largest set of data within <i>Insight</i> . There are three types of attribute data, including: <ul style="list-style-type: none"> • Time: Represents various dimensions of time • Source System: Represents data pulled from the mainframe system • Insight: Represents data created specifically for <i>Insight</i> not previously housed in other data sources 	<p><i>Time:</i></p> <ul style="list-style-type: none"> • Pay Period Number <p><i>Source System:</i></p> <ul style="list-style-type: none"> • Occ. Series <p><i>Insight:</i></p> <ul style="list-style-type: none"> • PATCO Code Description 	

Data Loading Cycle

Insight data updates align with traditional NFC PINE, ABCO, and BEAR updates.

March 2013

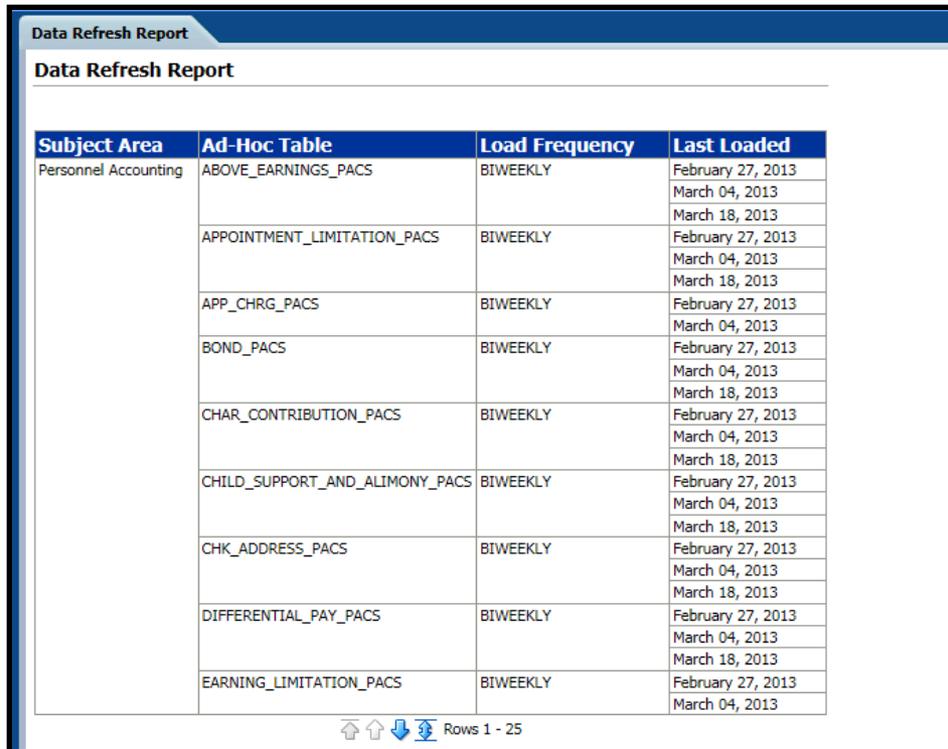


Pay Period 4 Pay Period 5 Pay Period 6

BEAR ABCO PINE *Insight* Biweekly Update *Insight* Weekly Update *Insight* Daily Update 30

Insight 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 report is structured by Subject Area.



The screenshot shows a web-based report titled "Data Refresh Report". It features a table with four columns: "Subject Area", "Ad-Hoc Table", "Load Frequency", and "Last Loaded". The "Subject Area" is "Personnel Accounting". The "Ad-Hoc Table" column lists various tables such as ABOVE_EARNINGS_PACS, APPOINTMENT_LIMITATION_PACS, APP_CHRG_PACS, BOND_PACS, CHAR_CONTRIBUTION_PACS, CHILD_SUPPORT_AND ALIMONY_PACS, CHK_ADDRESS_PACS, DIFFERENTIAL_PAY_PACS, and EARNING_LIMITATION_PACS. The "Load Frequency" for all tables is "BIWEEKLY". The "Last Loaded" column shows dates: February 27, 2013 and March 04, 2013, with some rows also showing March 18, 2013. At the bottom of the table, there are navigation icons and the text "Rows 1 - 25".

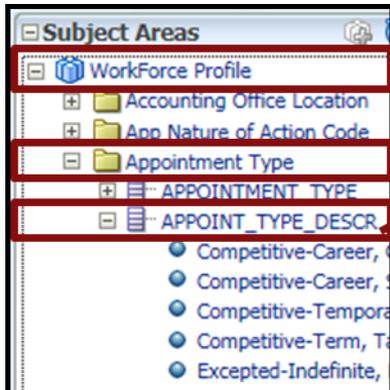
Subject Area	Ad-Hoc Table	Load Frequency	Last Loaded
Personnel Accounting	ABOVE_EARNINGS_PACS	BIWEEKLY	February 27, 2013
			March 04, 2013
			March 18, 2013
	APPOINTMENT_LIMITATION_PACS	BIWEEKLY	February 27, 2013
			March 04, 2013
			March 18, 2013
	APP_CHRG_PACS	BIWEEKLY	February 27, 2013
			March 04, 2013
	BOND_PACS	BIWEEKLY	February 27, 2013
			March 04, 2013
			March 18, 2013
	CHAR_CONTRIBUTION_PACS	BIWEEKLY	February 27, 2013
			March 04, 2013
			March 18, 2013
	CHILD_SUPPORT_AND ALIMONY_PACS	BIWEEKLY	February 27, 2013
			March 04, 2013
			March 18, 2013
	CHK_ADDRESS_PACS	BIWEEKLY	February 27, 2013
March 04, 2013			
March 18, 2013			
DIFFERENTIAL_PAY_PACS	BIWEEKLY	February 27, 2013	
		March 04, 2013	
		March 18, 2013	
EARNING_LIMITATION_PACS	BIWEEKLY	February 27, 2013	
		March 04, 2013	

The Data Refresh Report is located in the *Insight* System Reports folder within the Catalog Shared Folders.

Insight Data Dictionary

The *Insight* Data Dictionary outlines the data available within *Insight*. Use the *Insight* Data Dictionary as a reference to better understand:

- Data elements that comprise each Subject Area
- COBOL name, FOCUS name, and description for each data element
- Data source - either *Insight* or PPS
- Update frequency for each data element in the warehouse



Subject Areas

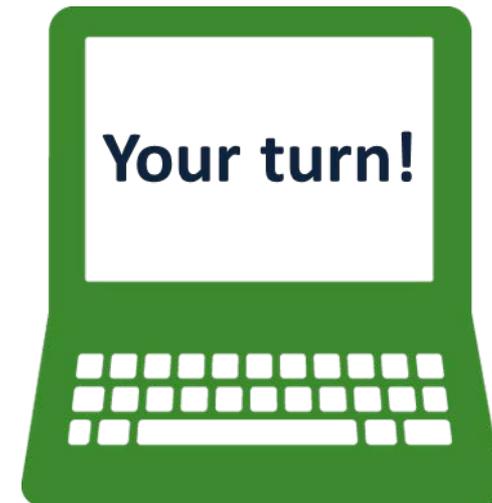
- WorkForce Profile
 - Accounting Office Location
 - App Nature of Action Code
 - Appointment Type
 - APPOINTMENT_TYPE
 - APPOINT_TYPE_DESCR
 - Competitive-Career, 4
 - Competitive-Career, 5
 - Competitive-Temporary
 - Competitive-Term, 1
 - Excepted-Indefinite,

National Finance Center - <i>Insight</i> Data Dictionary									
<i>Insight</i>			PPS Mapping			Description			
Subject Area	Folder	Data Element	COBOL Data Element	FOCUS Name	Alias	Description	Source (system)	Update Frequency in <i>Insight</i>	
Personnel Accounting System	Employee Salary	ACC_BREAK_SVC_IND	ACC-BREAK-SVC-IND	SVC_IND	C0118	Accession Break In Service Indicator A Code To Indicate If The Employee Has A Break In Service. The Codes Are: 0 = Not Applicable 1 = Separation/Accession Actions With No Break In	PPS-Salary	Bi-Weekly	
WorkForce Profile	Employee Salary	ACC_BREAK_SVC_IND	ACC-BREAK-SVC-IND	SVC_IND	C0118	Accession Break In Service Indicator A Code To Indicate If The Employee Has A Break In Service. The Codes Are: 0 = Not Applicable 1 = Separation/Accession Actions With No Break In	PPS-Salary	Bi-Weekly	
Personnel Accounting System	Employee Profile	ACCESSION_1ST_AUTH_CODE	ACCESSION-1ST-AUTH-CODE	ACC_1_ATH_CD	C5623	First 3 Digit Alphanumeric Code Assigned By Opm To Identify The Legal Authority For The Accession. Requested By Beth Alford 3/20/86	PPS-Personnel	Bi-Weekly	
Personnel History	Personnel Action	ACCESSION_1ST_AUTH_CODE	ACCESSION-1ST-AUTH-CODE	ACC_1_ATH_CD	C5623	First 3 Digit Alphanumeric Code Assigned By Opm To Identify The Legal Authority For The Accession. Requested By Beth Alford 3/20/86	PERHIS	Bi-Weekly	
WorkForce Profile	Employee Profile	ACCESSION_1ST_AUTH_CODE	ACCESSION-1ST-AUTH-CODE	ACC_1_ATH_CD	C5623	First 3 Digit Alphanumeric Code Assigned By Opm To Identify The Legal Authority For The Accession. Requested By Beth Alford 3/20/86	PPS-Personnel	Bi-Weekly	
Personnel Accounting System	Employee Profile	ACCESSION_2ND_AUTH_CODE	ACCESSION-2ND-AUTH-CODE	ACC_2_ATH_CD	C5624	Second 3 Digit Alphanumeric Code Assigned By Opm To Identify The Legal Authority For The Accession. Requested By Beth Alford 3/20/86	PPS-Personnel	Bi-Weekly	
Personnel History	Personnel Action	ACCESSION_2ND_AUTH_CODE	ACCESSION-2ND-AUTH-CODE	ACC_2_ATH_CD	C5624	Second 3 Digit Alphanumeric Code Assigned By Opm To Identify The Legal Authority For The Accession. Requested By Beth Alford 3/20/86	PERHIS	Bi-Weekly	

Exercise 3.1 and 3.2

Refer to the Participant Guide to complete the following exercises:

- **Exercise 3.1:** Data Structure
- **Exercise 3.2:** Types of Data



Understanding Data in *Insight* Accomplishments

Having completed this chapter, you are now able to:

- Describe how data elements are organized in *Insight*
- Describe the different types of data elements in *Insight*
- Describe the *Insight* data loading cycles
- Identify where users can access a detailed description of available data elements

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Understanding Reports and Dashboards in *Insight* Overview

This chapter will review the purpose of the Common Report Library and the value of common reports and dashboards in *Insight*.

Understanding Reports and Dashboards in *Insight* Objectives

By the end of this chapter, you will be able to:

- Describe the purpose of the Common Report Library
- Describe the types of common reports available within the Common Report Library
- Describe the value and utility of dashboards
- Identify the relationship between reports and dashboards

The Common Report Library is a set of frequently used, government-wide reports and dashboards that serve as templates for agencies to customize for their specific needs.

What the Common Report Library IS

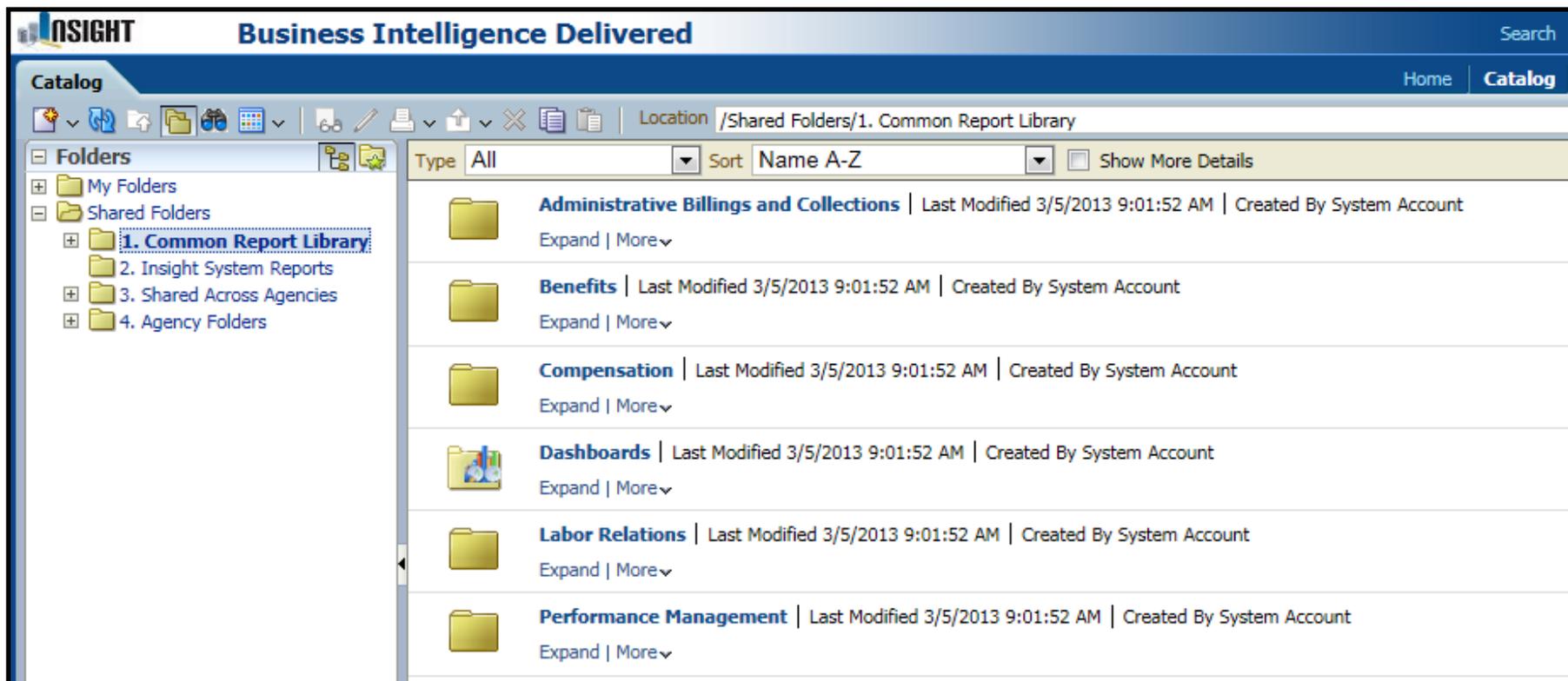
- A collection of frequently used, government-wide standard reports.
- Templates for users to customize based on their agency specific requirements.
- Combination of reports and dashboards.
- An example of the type of reporting users can conduct using the ad hoc environment.

What the Common Report Library IS NOT

- A comprehensive list of all reports agencies use.
- “Final” reports expected to fit every organization’s specific need.
- The only common reports and dashboards that will be available within *Insight*.

Common Report Library (cont'd)

The structure of the Common Report Library follows the Office of Personnel Management's (OPM) Business Reference Model (BRM) categories which outline each function in the HR life cycle. Each folder within the Common Report Library represents one of these functions.



The screenshot displays the INSIGHT Business Intelligence Catalog interface. The top navigation bar includes the INSIGHT logo, the text "Business Intelligence Delivered", and a search field. Below the navigation bar, the "Catalog" section is active, showing a breadcrumb path: "/Shared Folders/1. Common Report Library". The left sidebar shows a tree view of folders under "Shared Folders", with "1. Common Report Library" selected. The main content area displays a list of folders, each with a yellow folder icon, a title, and metadata (Last Modified and Created By). The folders listed are:

Type	Sort	Show More Details
All	Name A-Z	<input type="checkbox"/>
Administrative Billings and Collections	Last Modified 3/5/2013 9:01:52 AM	Created By System Account
Benefits	Last Modified 3/5/2013 9:01:52 AM	Created By System Account
Compensation	Last Modified 3/5/2013 9:01:52 AM	Created By System Account
Dashboards	Last Modified 3/5/2013 9:01:52 AM	Created By System Account
Labor Relations	Last Modified 3/5/2013 9:01:52 AM	Created By System Account
Performance Management	Last Modified 3/5/2013 9:01:52 AM	Created By System Account

Common Report Library (cont'd)

The Common Report Library contains both reports and dashboards, which are represented by different icons and serve different purposes in the reporting process.

Type	Description	Example	Icon
Report	<p>A report is a combination of information that answers a business question. Reports can include a table, text, graph, etc.</p> <p>There are two types of reports:</p> <ul style="list-style-type: none"> • Operational • Managerial 	<p><i>Operational</i></p> <ul style="list-style-type: none"> • Leave Data and Usage by Employee <p><i>Managerial</i></p> <ul style="list-style-type: none"> • Leave Data and Usage Managerial Report 	
Dashboard	<p>A dashboard presents a “snapshot” of data findings across multiple reports within a common theme or purpose.</p> <p>Dashboards provide management summaries, drill-down analysis, trend analysis, variance analysis, etc.</p>	<p><i>Dashboard</i></p> <ul style="list-style-type: none"> • New Hires Dashboard 	

Types of Reports in the Common Report Library

Operational reports are the most detailed reports and answer a business question with a simple table or graph.

Leave Data and Usage by Employee

SEPARATION_ACCESSION_TYPE is equal to 0, 3
and DEPARTMENT_CODE is equal to DS

Total Employee Headcount		33,213
Average AL Used YTD		83.03
Average AL Balance		149.13
Average SL Used YTD		39.14
Average SL Balance		408.79
Average CL Used YTD		0.00
Average CL Balance		4.92

Operational report contains a detailed table relating to a single topic.

Org Structure	POI	Employee Name	Pay Plan	Grade/Step	Occ Series	AL Category	AL Used YTD	AL Balance	SL Used YTD	SL Balance
DS010100000000000000	1192	Doherty, Kenneth	GS	07/9	0301	Earns 8 Hours Of Annual Leave	24.25	107.75	16.00	75.75
DS010100000000000000	1192	Doherty, Kenneth	GS	07/9	0301	Earns 8 Hours Of Annual Leave	111.75	116.00	50.25	83.75
DS010100000000000000	1192	Feathers, Karen D	GS	07/1	0399	Earns 4 Hours Of Annual Leave	118.25	7.50	80.50	48.25
DS010100000000000000	1192	Feathers, Karen D	GS	09/1	0343	Earns 4 Hours Of Annual Leave	14.50	1.00	12.50	43.75
DS010100000000000000	1192	Karin, Dunbar R	GS	15/10	0301	Earns 6 Hours Of Annual Leave	0.00	54.00	0.00	104.00
DS010100000000000000	1192	Karin, Dunbar R	GS	15/10	0301	Earns 6 Hours Of Annual Leave	98.00	42.00	0.00	96.00
DS010100000000000000	1192	Maria, Fawaz NELL	GS	15/2	0301	Earns 6 Hours Of Annual Leave	0.50	236.00	2.00	30.50
DS010100000000000000	1192	Maria, Fawaz NELL	GS	15/2	0301	Earns 6 Hours Of Annual Leave	104.00	224.50	240.00	24.50
DS010100000000000000	1192	Patrick, Bridge A	ES	00/0	0301	Earns 8 Hours Of Annual Leave	0.00	280.00	0.00	983.25
DS010100000000000000	1192	Patrick, Bridge A	ES	00/0	0301	Earns 8 Hours Of Annual Leave	192.00	264.00	118.00	975.25
DS010100000000000000	1192	Rawlings, Kathryn	GS	15/10	0301	Earns 6 Hours Of Annual Leave	80.00	-40.00	0.00	100.00
DS010100000000000000	1192	Rawlings, Kathryn	GS	15/10	0301	Earns 6 Hours Of Annual Leave	144.00	28.00	60.00	92.00
DS010100000000000000	1192	Robert, Frank B	GS	14/3	0341	Earns 6 Hours Of Annual Leave	0.00	243.00	4.00	363.25
DS010100000000000000	1192	Robert, Frank B	GS	14/3	0341	Earns 6 Hours Of Annual Leave	106.00	231.00	82.00	359.25

Types of Reports in the Common Report Library (cont'd)

Managerial reports provide a mid-level data detail. Drill-down functionality gives users a more detailed data view based on the selection, ideal for supervisors and managers.

Leave Data and Usage Managerial Report

Home Catalog Favorites Dashboards New Open Signed In As Train53

Leave Data and Usage Managerial Report

SEPARATION_ACCESSION_TYPE is equal to 0, 3
and DEPARTMENT_CODE is equal to DS

The information contained within this report is updated biweekly after payroll has run.

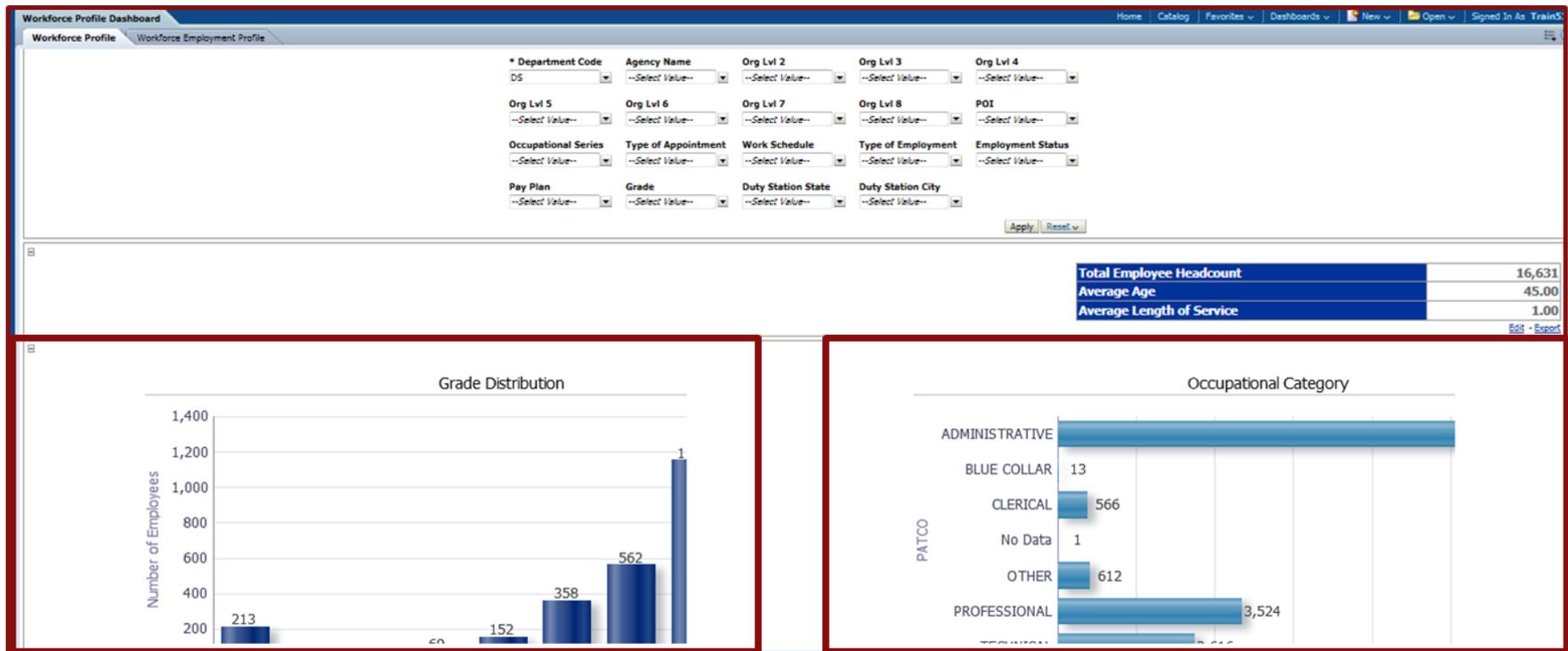
Department Code	AGENCY_NAME	Average AL Used YTD	Average AL Balance	Average SL used YTD	Average SL Balance	Average CL Used YTD	Average CL Balance	Employee Count
DS	Agency for Service Area 1	78.98	143.94	41.39	315.07	0.00	0.79	214
DS	Agency for Service Area 10	85.32	138.78	44.84	287.54	0.00	0.12	1,515
DS	Agency for Service Area 11	95.13	146.96	47.90	435.45	0.00	1.20	462
DS	Agency for Service Area 12	76.21	162.04	32.99			1.46	120
DS	Agency for Service Area 13	89.09	145.70	42.44			0.08	3,340
DS	Agency for Service Area 14	79.47	137.60	39.98			0.00	53
DS	Agency for Service Area 15	75.02	126.60	37.30	312.00	0.00	0.60	1,984
DS	Agency for Service Area 17	85.55	158.80	37.20	485.66	0.00	1.94	4,483
DS	Agency for Service Area 18	81.08	141.33	37.23	434.85	0.00	1.44	1,519
DS	Agency for Service Area 19	88.45	152.73	39.72	414.41	0.00	0.86	1,455

Action links provide access to a drill-down report.

Users can distinguish managerial reports from operational reports as the title will include “Managerial Report”.

Types of Reports in the Common Report Library (cont'd)

Dashboards provide the user with the “30,000 foot 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.

Comparing Reports and Dashboards

Reports and dashboards serve different purposes in the reporting process based on the depth or breadth of information the user needs to answer a business question.

New Hire Listing

DEPARTMENT_CODE is equal to DS
and "Personnel Action"."NAT_ACT_2ND_3_POS" like '953' or "Personnel Action"."NAT_ACT_2ND_3_POS

Provides a roster of new hires and employee characteristics.

Org Structure	POI	Employee Name	Pay Plan	Grade/Step	NOA Code	Legal Authority	2nd Legal Authority	Service Computation Date	Hire Effect Date
DS010100000000000000	1192	Jordan, Martha M	ES	00 / 0	INTERNATIONAL CHILD LABOR PR	Excepted-Limited (More Than 1			
DS010100000000000000	1192	Saporta Da Cunha, Mario J	ES	00 / 0	ASSOCIATE DEPUTY UNDER SECRETARY FOR I	Undefined	Competitive-Career, SES Career	0301	
DS010100000000000000	1192	Vitaly, Balan A	GS	03 / 1	CLERK	All Other Positions	Expedite	0303	
DS010100000000000000	1192	Vitaly, Balan A	GS	03 / 1					
DS010100000000000000	1192	Pensoneau-Conway, Sandra C	GS	11 / 1	INTERNATIONAL RELATIONS ANALYST	All Other Positions	Expedite	0131	
DS010100000000000000	1192	Harold, Kim E	GS	11 / 1	INTERNATIONAL RELATIONS ANALYST				07/25/04
DS010101030000000000	1192	Jiang, Yuanyuan S	GS	12 / 3	ECONOMIS				

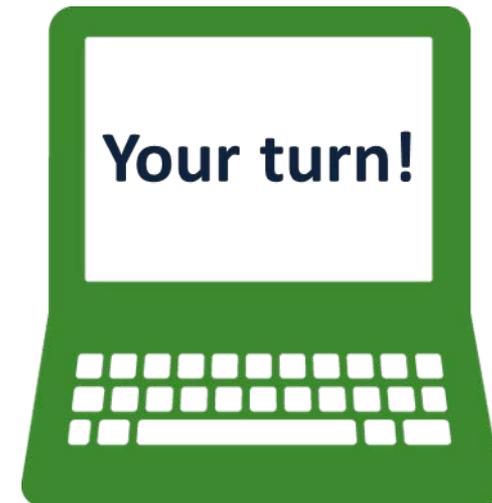
Provides a variety of summary views of new hire characteristics.



Exercise 4.1 and 4.2

Refer to the Participant Guide to complete the following exercises:

- **Exercise 4.1:** Common Report Library
- **Exercise 4.2:** Reports and Dashboards



Understanding Reports and Dashboards in *Insight* Review

Understanding Reports and Dashboards in *Insight* Accomplishments

Having completed this chapter, you are now able to:

- Describe the purpose of the Common Report Library
- Describe the types of common reports available within the Common Report Library
- Describe the purpose and value of dashboards
- Identify the relationship between reports and dashboards

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Basic Navigation

Basic Navigation Overview

Basic Navigation Overview

This chapter will review *Insight's* user friendly functionality, including basic navigation and accessing the Common Report Library.

Basic Navigation Objectives

By the end of this chapter, you will be able to:

- Describe *Insight* key terms
- Demonstrate *Insight* sign in and basic navigation
- Describe structure of *Insight* My Folders and Shared Folders

The *Insight* Participant Guide Appendix contains a glossary of key terms and icons that are helpful as users navigate *Insight*, including:

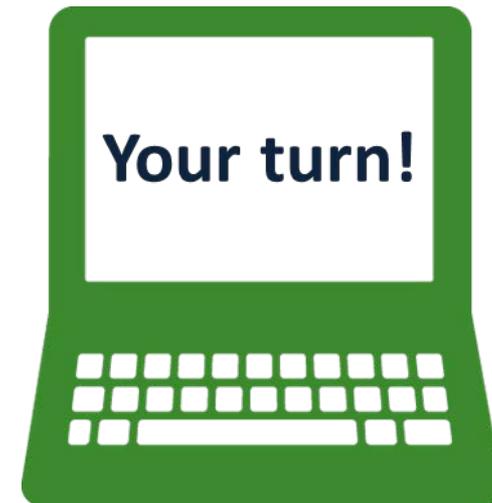
- **Analysis:** Another name for report in *Insight*, an analysis answers a inquiry or request against an organization's data.
- **Catalog:** Organization system that provides access to personal and shared folders, including the Common Report Library.
- **Dashboard:** A “snapshot” of data findings across multiple reports in a common theme or purpose.
- **My Folders:** Folders that contain the user's privately saved reports; these reports cannot be accessed by other users.
- **Prompt:** Mechanism that the user can actively manipulate to restrict the data at the time the report or dashboard runs.
- **Shared Folders:** Folders that allow the user to access the Common Report Library, *Insight* System Reports, Shared Across Agencies, agency specific folders, and other reports users have made available.

Demonstration in *Insight*

Exercise 5.1

Refer to the Participant Guide and sign in to *Insight* to complete the following exercise:

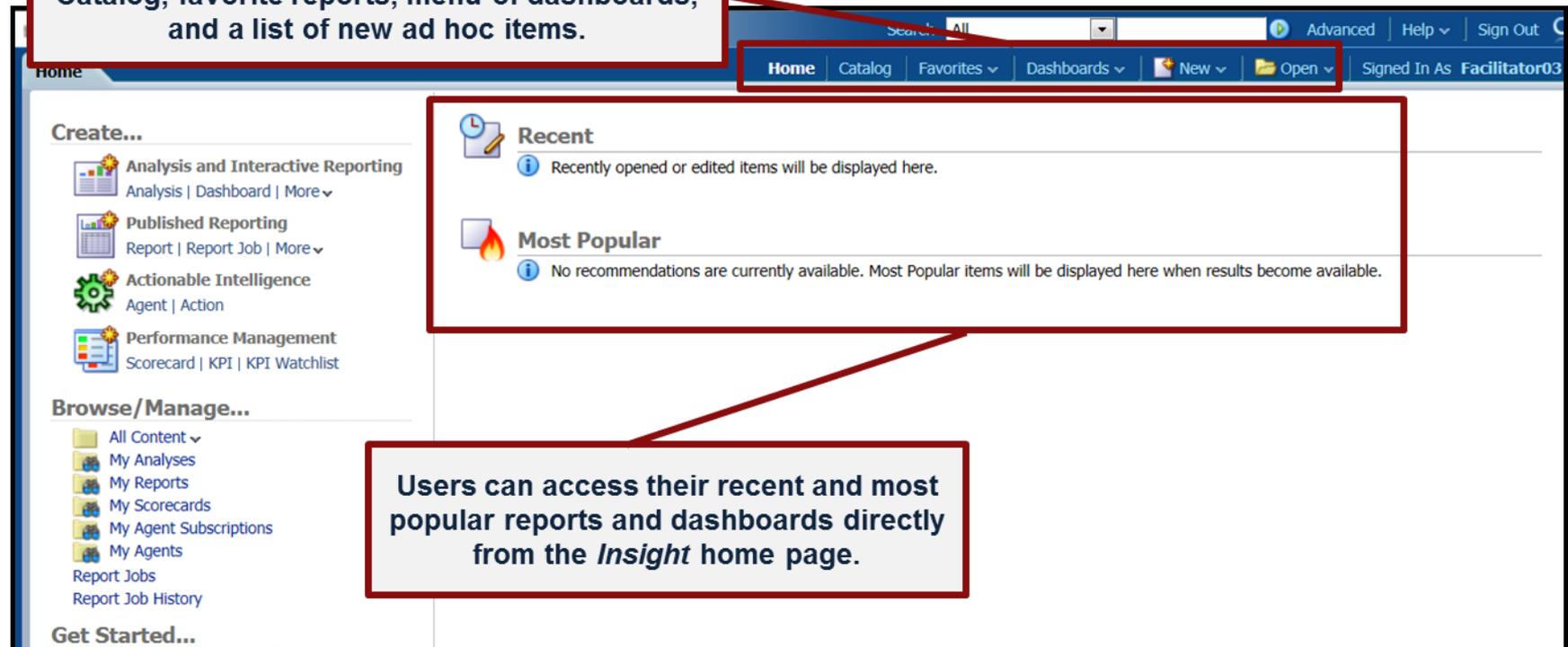
- **Exercise 5.1:** Add a Report to Favorites



Basic Navigation

The *Insight* home page provides quick navigation to access users' recent and most popular items, visit a Catalog of personal and shared folders, create new reports or dashboards, and more.

The top navigation bar provides access to the Catalog, favorite reports, menu of dashboards, and a list of new ad hoc items.

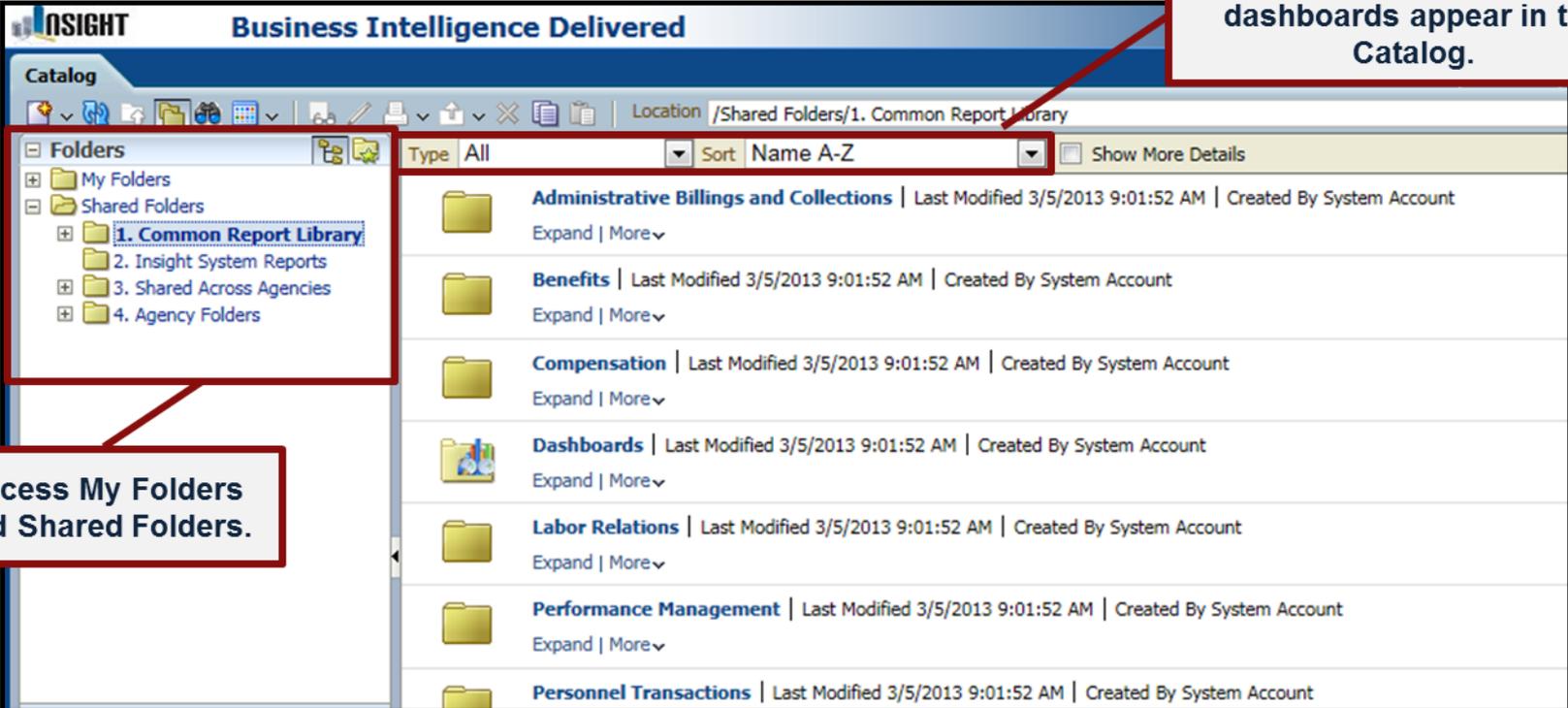


The screenshot shows the Insight home page interface. At the top, there is a search bar and navigation links for 'Advanced', 'Help', and 'Sign Out'. Below this is a navigation bar with 'Home', 'Catalog', 'Favorites', 'Dashboards', 'New', and 'Open'. The main content area is divided into sections: 'Create...' with options like 'Analysis and Interactive Reporting', 'Published Reporting', 'Actionable Intelligence', and 'Performance Management'; 'Browse/Manage...' with a list of folders like 'All Content', 'My Analyses', 'My Reports', etc.; and 'Get Started...'. Two callout boxes are present: one pointing to the top navigation bar and another pointing to the 'Recent' and 'Most Popular' sections.

Users can access their recent and most popular reports and dashboards directly from the *Insight* home page.

Catalog

The Catalog provides access to My Folders and Shared Folders containing a library of users' saved reports and dashboards, including those that are part of the Common Report Library.



Access My Folders and Shared Folders.

Manipulate how reports and dashboards appear in the Catalog.

Type	Sort	Show More Details
All	Name A-Z	<input type="checkbox"/>

Folder Name	Last Modified	Created By
Administrative Billings and Collections	3/5/2013 9:01:52 AM	System Account
Benefits	3/5/2013 9:01:52 AM	System Account
Compensation	3/5/2013 9:01:52 AM	System Account
Dashboards	3/5/2013 9:01:52 AM	System Account
Labor Relations	3/5/2013 9:01:52 AM	System Account
Performance Management	3/5/2013 9:01:52 AM	System Account
Personnel Transactions	3/5/2013 9:01:52 AM	System Account

Basic Navigation Review

Basic Navigation Accomplishments

Having completed this chapter, you are now able to:

- Describe *Insight* key terms
- Demonstrate *Insight* sign in and basic navigation
- Describe structure of *Insight* My Folders and Shared Folders

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Access Reports Overview

This chapter will review how users can access a report in the Catalog to run, export, print, and schedule.

Access Reports Objectives

By the end of this chapter, you will be able to:

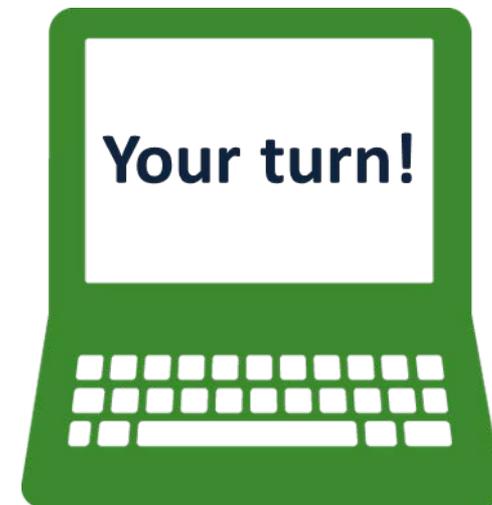
- Demonstrate how to run a report from the Common Report Library
- Demonstrate how to manipulate report appearance in run mode
- Demonstrate how to export and print a report
- Demonstrate how to schedule a report to run

Demonstration in *Insight*

Exercise 6.1 and 6.2

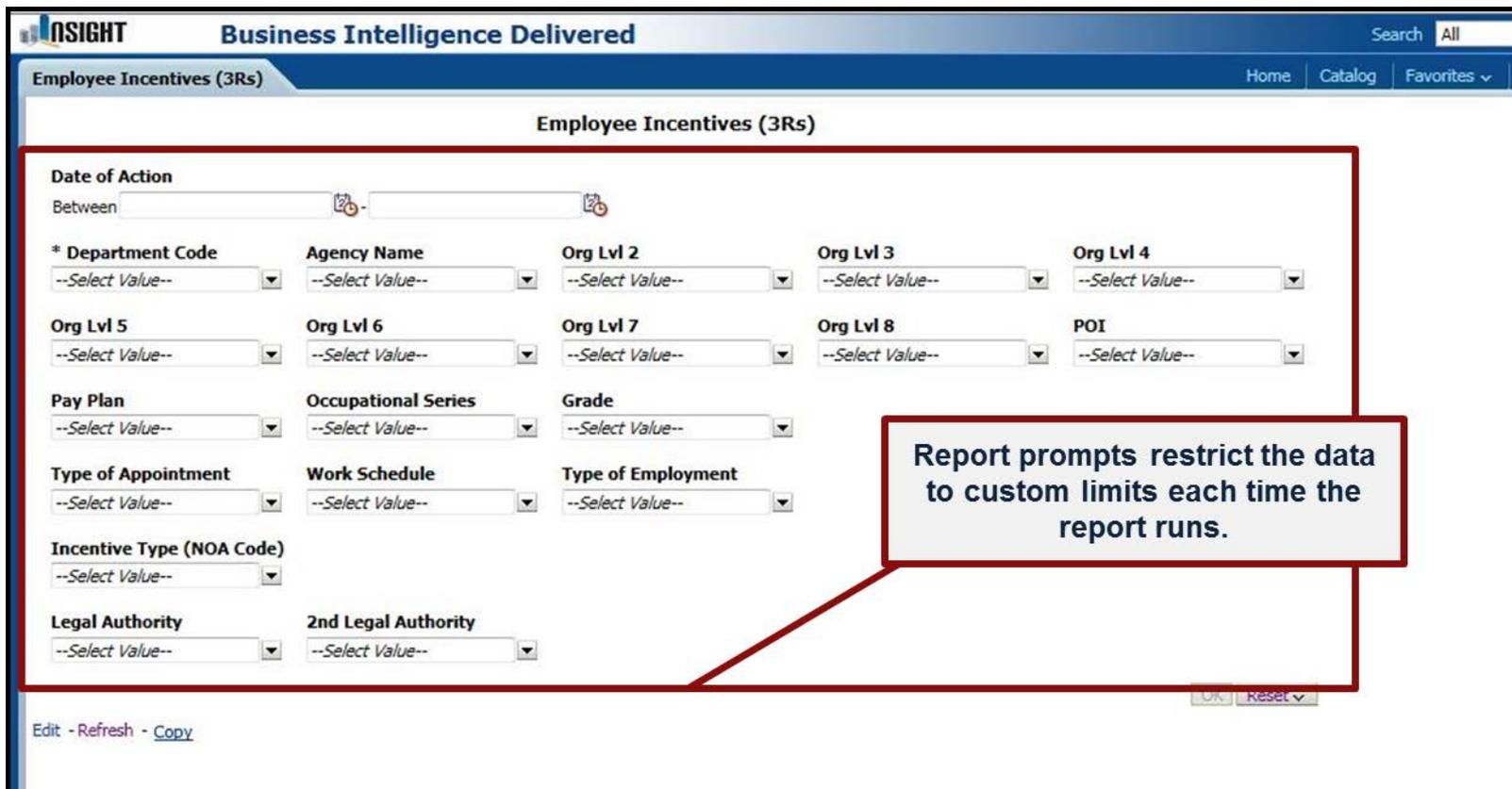
Refer to the Participant Guide and sign in to *Insight* to complete the following exercises:

- **Exercise 6.1:** Run and Export a Common Report
- **Exercise 6.2:** Run, Manipulate, and Export a Common Report



Run a Report

Users can choose from a number of reports within the Common Report Library to run. Report prompts will restrict the data to custom ranges as the report runs.



INSIGHT Business Intelligence Delivered Search All

Employee Incentives (3Rs) Home Catalog Favorites ▾

Employee Incentives (3Rs)

Date of Action
Between -

* Department Code Agency Name 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 2nd Legal Authority

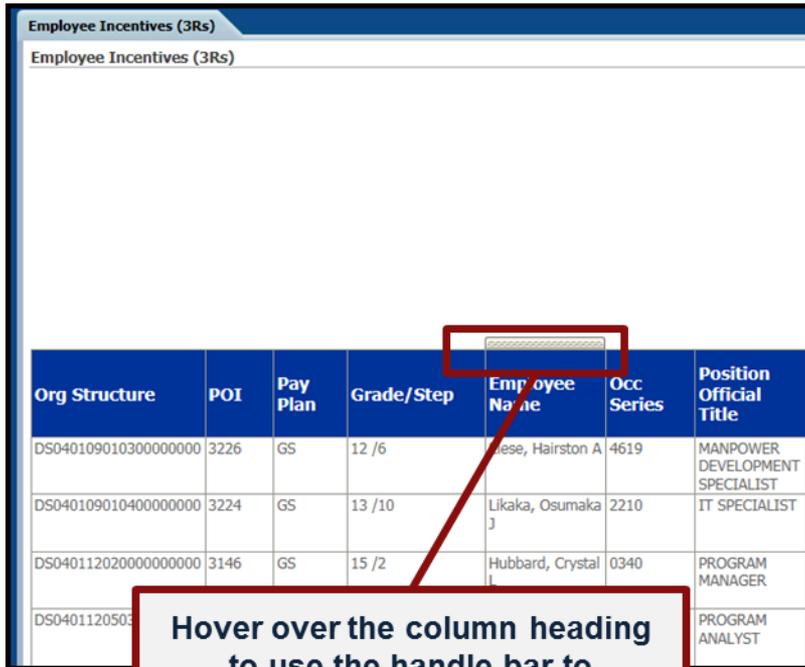
OK Reset ▾

Edit - Refresh - Copy

Report prompts restrict the data to custom limits each time the report runs.

Manipulate a Report

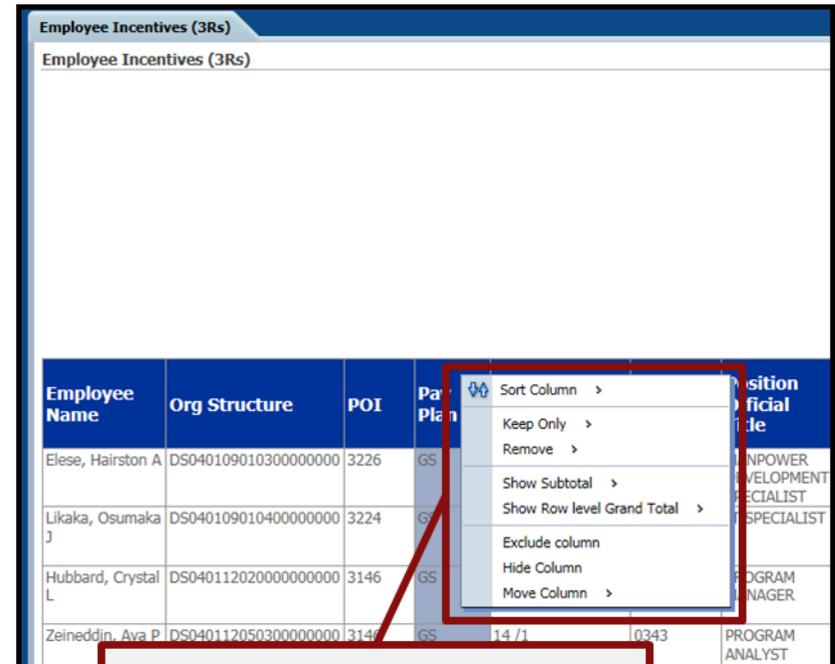
Once the report is run, users can make simple modifications to reports such as changing how the report is structured.



Employee Incentives (3Rs)

Org Structure	POI	Pay Plan	Grade/Step	Employee Name	Occ Series	Position Official Title
DS040109010300000000	3226	GS	12 /6	Elese, Hairston A	4619	MANPOWER DEVELOPMENT SPECIALIST
DS040109010400000000	3224	GS	13 /10	Likaka, Osumaka J	2210	IT SPECIALIST
DS040112020000000000	3146	GS	15 /2	Hubbard, Crystal L	0340	PROGRAM MANAGER
DS040112050300000000						PROGRAM ANALYST

Hover over the column heading to use the handle bar to manipulate report structure.



Employee Incentives (3Rs)

Employee Name	Org Structure	POI	Pay Plan	Grade/Step	Employee Name	Occ Series	Position Official Title
Elese, Hairston A	DS040109010300000000	3226	GS	12 /6	Elese, Hairston A	4619	MANPOWER DEVELOPMENT SPECIALIST
Likaka, Osumaka J	DS040109010400000000	3224	GS	13 /10	Likaka, Osumaka J	2210	IT SPECIALIST
Hubbard, Crystal L	DS040112020000000000	3146	GS	15 /2	Hubbard, Crystal L	0340	PROGRAM MANAGER
Zeineddin, Ava P	DS040112050300000000	3146	GS	14 /1		0343	PROGRAM ANALYST

Right-click on the column heading to view a menu of options to customize report.

Export/Print Reports

Insight provides a variety of options for users to export and/or print a report to simplify sharing of information.



Employee Incentives (3Rs)

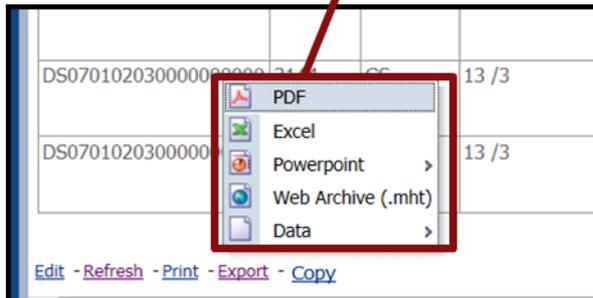
ID	Agency	Position	Salary	Name	...
DS070102030000000000	3144	GS	13 / 3	Martha, Muldoon	0110
DS070102030000000000	3144	GS	13 / 3	Martha, Muldoon	0110
DS070102030000000000	3144	GS	13 / 3	Martha, Muldoon	0110
DS070102030000000000	3144	GS	13 / 3	Martha, Muldoon	0110
DS070102030000000000	3144	GS	13 / 3	Martha, Muldoon	0110
DS070102030000000000	3144	GS	13 / 3	Martha, Muldoon	0110
DS070102030000000000	3144	GS	13 / 3	Martha, Muldoon	0110

Home Catalog Favorites Dashboards New Open

Edit - Refresh - Print - Export - Copy

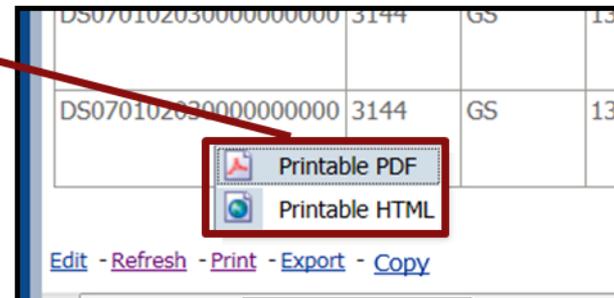
Click the Export and Print action links to choose from a menu of export and print options.

Rows 1 - 25



PDF
Excel
Powerpoint
Web Archive (.mht)
Data

Edit - Refresh - Print - Export - Copy



Printable PDF
Printable HTML

Edit - Refresh - Print - Export - Copy

Access Reports Review

Access Reports Accomplishments

Having completed this chapter, you are now able to:

- Demonstrate how to run a report from the Common Report Library
- Demonstrate how to manipulate report appearance in run mode
- Demonstrate how to export and print a report
- Demonstrate how to schedule a report to run

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Access Dashboards Overview

Access Dashboards Overview

This chapter will review how *Insight* users can run a dashboard to see the “30,000 foot view” of their data.

Access Dashboards Objectives

By the end of this chapter, you will be able to:

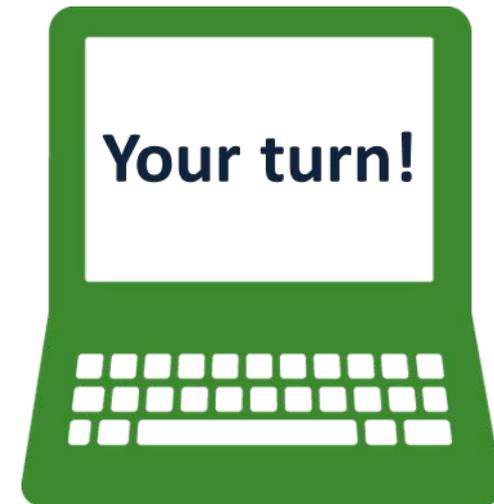
- Demonstrate how to access a dashboard
- Demonstrate how to drill-down within a dashboard
- Demonstrate how to export and print a dashboard

Demonstration in *Insight*

Exercise 7.1

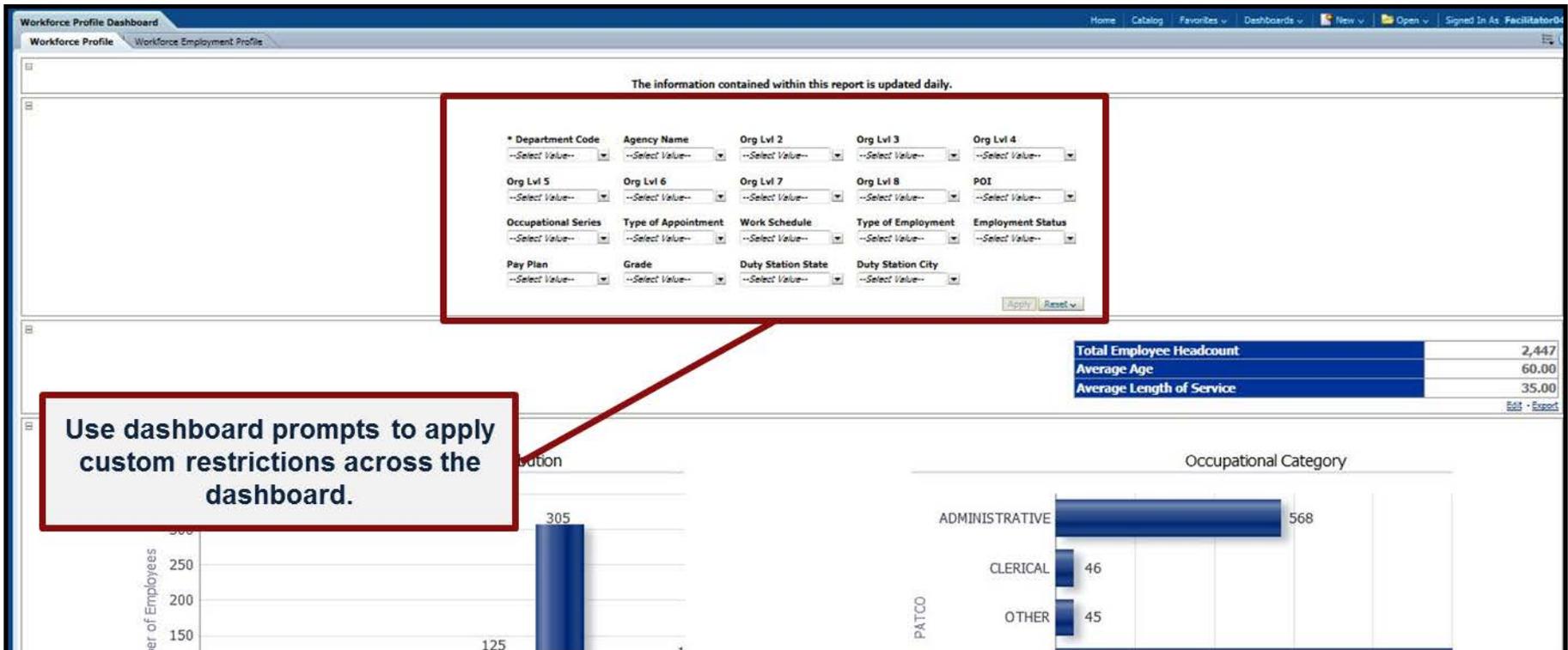
Refer to the Participant Guide and sign in to *Insight* to complete the following exercise:

- **Exercise 7.1:** Run, Drill-down, and Print a Common Dashboard



Run a Dashboard

Insight dashboards provide a summary view of data across a common theme or purpose. Dashboard prompts allow users to actively manipulate data to a defined data set.



The information contained within this report is updated daily.

*** Department Code** --Select Value--
Agency Name --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--
Occupational Series --Select Value--
Type of Appointment --Select Value--
Work Schedule --Select Value--
Type of Employment --Select Value--
Employment Status --Select Value--
Pay Plan --Select Value--
Grade --Select Value--
Duty Station State --Select Value--
Duty Station City --Select Value--

Apply Reset

Total Employee Headcount	2,447
Average Age	60.00
Average Length of Service	35.00

Number of Employees

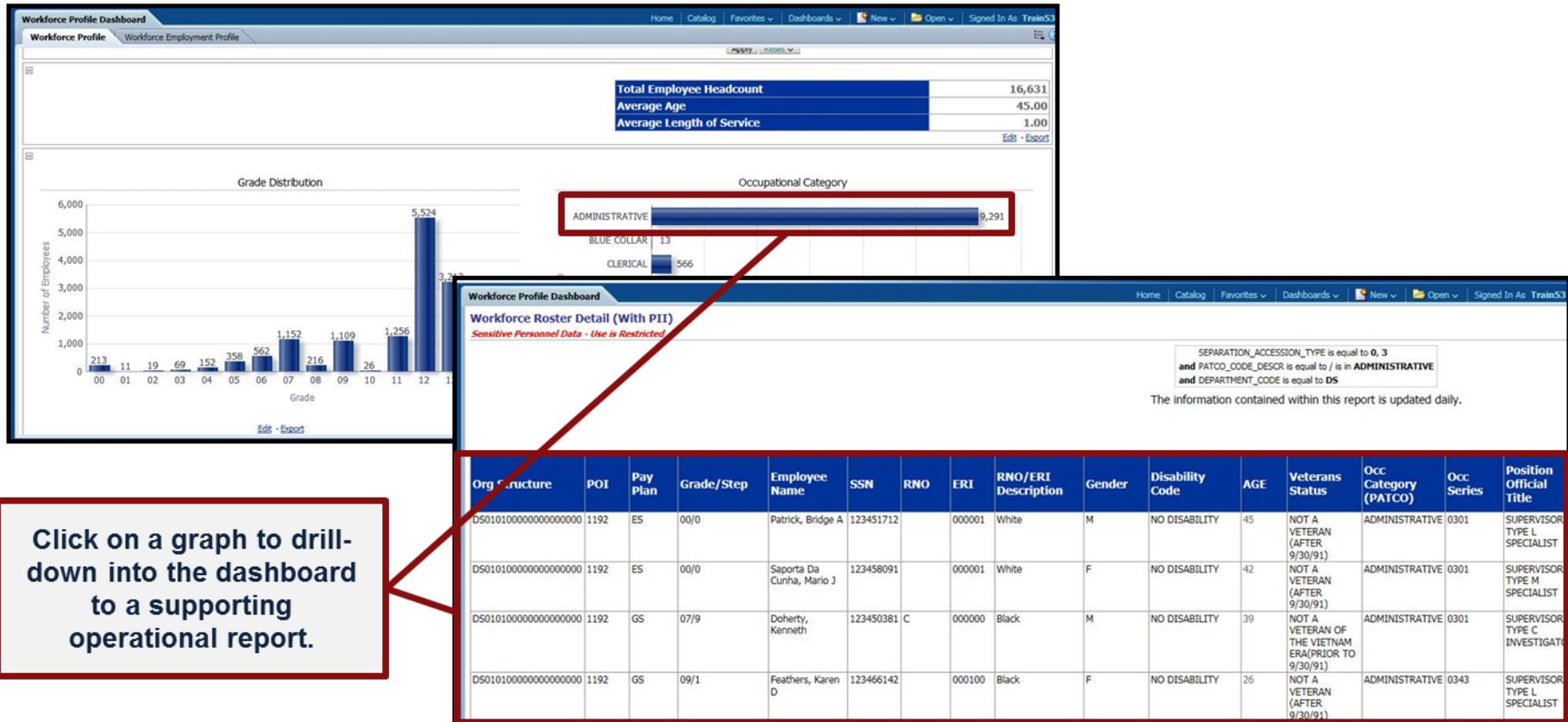
Occupational Category

ADMINISTRATIVE	568
CLERICAL	46
OTHER	45

Use dashboard prompts to apply custom restrictions across the dashboard.

Drill-Down in a Dashboard

Users can drill-down into a specific dashboard component to get a more detailed look at data.



Workforce Profile Dashboard

Home Catalog Favorites Dashboards New Open Signed In As Train53

Workforce Profile Workforce Employment Profile

Total Employee Headcount 16,631
Average Age 45.00
Average Length of Service 1.00
[Edit](#) [Export](#)

Grade Distribution

Occupational Category

ADMINISTRATIVE 9,291
BLUE COLLAR 13
CLERICAL 566

Workforce Profile Dashboard

Home Catalog Favorites Dashboards New Open Signed In As Train53

Workforce Roster Detail (With PII)
Sensitive Personnel Data - Use is Restricted

SEPARATION_ACCESSION_TYPE is equal to 0, 3
and PATCO_CODE_DESCR is equal to / is in ADMINISTRATIVE
and DEPARTMENT_CODE is equal to DS

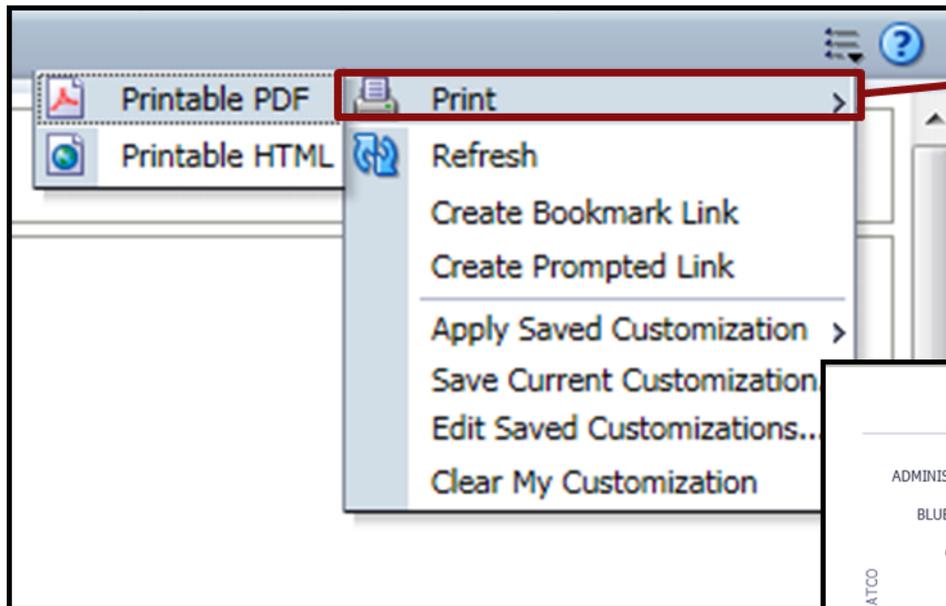
The information contained within this report is updated daily.

Org Structure	POI	Pay Plan	Grade/Step	Employee Name	SSN	RNO	ERI	RNO/ERI Description	Gender	Disability Code	AGE	Veterans Status	Occ Category (PATCO)	Occ Series	Position Official Title
DS010100000000000000	1192	ES	00/0	Patrick, Bridge A	123451712		000001	White	M	NO DISABILITY	45	NOT A VETERAN (AFTER 9/30/91)	ADMINISTRATIVE	0301	SUPERVISOR TYPE L SPECIALIST
DS010100000000000000	1192	ES	00/0	Saporta Da Cunha, Mario J	123458091		000001	White	F	NO DISABILITY	42	NOT A VETERAN (AFTER 9/30/91)	ADMINISTRATIVE	0301	SUPERVISOR TYPE M SPECIALIST
DS010100000000000000	1192	GS	07/9	Doherty, Kenneth	123450381	C	000000	Black	M	NO DISABILITY	39	NOT A VETERAN OF THE VIETNAM ERA (PRIOR TO 9/30/91)	ADMINISTRATIVE	0301	SUPERVISOR TYPE C INVESTIGAT
DS010100000000000000	1192	GS	09/1	Feathers, Karen D	123466142		000100	Black	F	NO DISABILITY	26	NOT A VETERAN (AFTER 9/30/91)	ADMINISTRATIVE	0343	SUPERVISOR TYPE L SPECIALIST

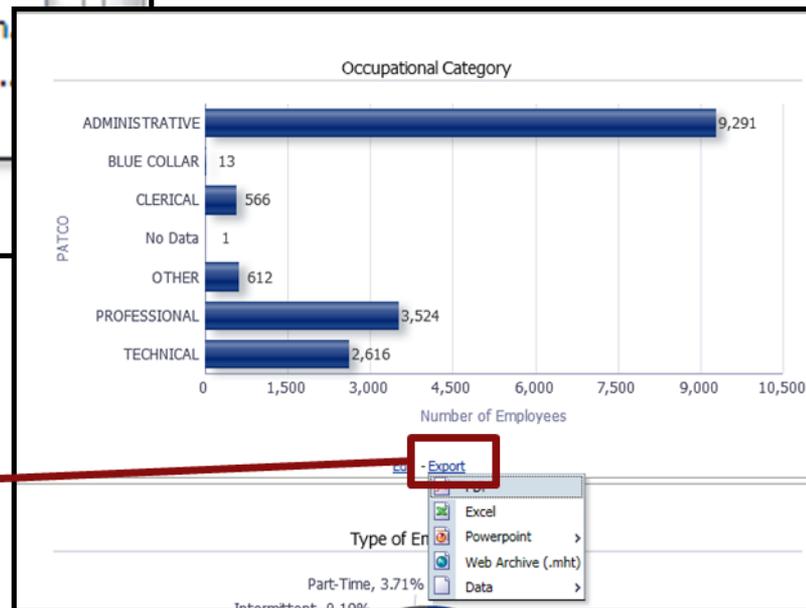
Click on a graph to drill-down into the dashboard to a supporting operational report.

Export/Print a Dashboard

Users can easily print a dashboard or export individual components of the dashboard to share results.



From the run view of a dashboard, users can choose to print to PDF or Printable HTML.



Users can export individual dashboard reports directly from the dashboard run view.

Access Dashboards Review

Access Dashboards Accomplishments

Having completed this chapter, you are now able to:

- Demonstrate how to access a dashboard
- Demonstrate how to drill-down within a dashboard
- Demonstrate how to export and print a dashboard

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Insight: Using Reports and Dashboards Training Objectives

Having completed this course participants are now able to:

- Describe the purpose of *Insight* as a reporting and analytics solution
- Describe how data, reports, and dashboards are structured in *Insight*
- Identify key features of *Insight's* basic navigation
- Demonstrate how to access, view and export reports and dashboards

Closing and Additional Resources

Questions

Are there any unanswered questions or concerns regarding today's training?

Provide Feedback

Please complete the training evaluation before you leave to allow for continuous improvement of the course.

Help

For additional resources please refer to the *Insight* website:

www.nfc.usda.gov/insight