Creating an Analysis

This guide will cover:

- How to create a basic analysis in the Catalyst Reporting Tool.
- How to customize a column using the column properties
- How to add basic filters
- How to view results

Step One
Hover over the New icon in the Global Header and select the Analysis option from the drop-down.

Step Two
Select a subject area from the Select Subject Area menu.

Subject Areas are essentially mini-databases from which an analysis can be created. These are modeled by CaRT Administrators based on business requirements.

Note: The Data Dictionary (accessible from the dashboards drop-down) may aide in locating the best subject area to use depending upon the type of data you wish to view.
Step Three

After selecting a Subject Area from the drop-down list, you will be directed to the Analysis Editor. The Subject Area appears in the left pane with multiple folders also referred to as tables. Expand the subject area by clicking on the plus button next to the folder. This will display available data and metrics that can be added to your analysis as columns.

The Analysis Editor contains three main tabs (depending upon access):

- **Criteria Tab** – used to select columns and add filters to an analysis
- **Results Tab** – used for viewing and modifying results based on the view of the analysis (table, graph, etc.)
- **Prompts Tab** – used to add prompts that will populate a filter with different values

Step Four

To select an item as a column, double-click or drag the item from the subject area to the "Selected Columns" section.
If you would like to customize the column such as changing the column heading or data format, hover over or click on the properties icon of a column and select the **Column Properties** option.

The Column Properties window contains multiple tabs including:

- **Style tab** – Allows for basic customization of the selected column's font, cell, border, and other formatting options.
- **Column Format** – Allows users to customize the column heading. Also allows users to update the value suppression options which will control how data is grouped together for matching value (e.g. students with the same last name).
- **Data Format** – Allows users to override the default data format for the selected column. This will users to change a date or currency setting as well as the number of decimal places that display.
- **Conditional Format** – Allows users to create a format for a cell if a set of conditions are met. For example, this could make a cell on the table red in the GPA column if student falls below a threshold or change colors if they meet the desired value.
- **Interaction** – Allows users to create advanced interactive reports by including "drill-down" options or action links.
Step Five

Apply any desired filters. This can be done by clicking on the properties icon of a desired selected column and select the Filter option.

OR

Click the Add Filter icon and select an available column or select More Columns... for more options within the selected Subject Area.

Expand the Operator dropdown in the New Filter prompt window to change how the filter will operate.

Expand the Value and select the desired value(s).

Note: The binoculars icon can be used to search for specific values.

Once the desired value(s) have been selected click the OK button. Repeat this step as necessary.
Based on the subject area and filters selected, the query in this screenshot will retrieve all students currently active in an academic program (e.g. Arts & Science Baccalaureate, UCBA Associate) with an Academic Plan of Chemistry - BS or Chemistry - AA.

Step Six

Once the desired columns have been selected and customized as well as all desired filters have been applied, click on the Results tab to view the results. The results will display within the compound layout with both a defaulted table and title view.
Views (ex: Title View, Table View) are based on the subject area columns and filters selected from the Criteria Tab and provide an image of how data will be displayed in real time. The Compound Layout is the parent holder for a customizable assortment of views from which you wish to comprise your Analysis. Each created view will its own formatting, editing and removal options.

**Icon Definitions**

- **Format Container** – Properties allow you to format or style the particular view in question.
- **Edit View** – Launches the edit mode of the view object selected for editing.
- **Remove View from Compound Layout** – Excludes the view from the Compound Layout, however, the view object still exists in the View Manager.

**Step Seven**
If you would like to edit a view's properties, click the **Edit** icon of the view. From there, click on the **View Properties** icon and customize any available properties. These options will differ based on the view.
When editing a view, be sure to click the **Done** button to return to the compound layout.

The **Revert** button will undo *ALL* changes made to the view.

**Step Eight**

To save the newly created analysis, click the save icon in the upper-right corner of the Analysis editor. Folders can be created within the **My Folders** parent folder or within the individual user's **Shared Side CaRT** folder titled with the user's username (6+2).

**IMPORTANT:** In order to share a saved analysis with another CaRT user, the analysis must be saved within the **Shared Side CaRT** folder.
Using the Catalog to Open or Edit a Saved Analysis

To open an analysis for the purpose of "running" the query, click the Catalog link located in the Global Header.

Navigate to the desired analysis or dashboard using the Folders pane located on the left side of the screen.

Once the desired analysis or dashboard has been found:

- Click the Open button to run the report and view real time data (based on the latest refresh cycle)
- Click the Edit button to open the analysis editor and make any necessary changes.
- Click the More button for additional options including (but not limited to):
  - Print
  - Export
  - Delete
  - Copy
  - Rename
  - Add to Favorites
You have now completed the steps for creating an analysis, customizing a column, adding basic filters, and viewing results.