Creating an Analysis

This guide will cover:

- How to create a basic analysis in the Catalyst Reporting Tool.

**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 from the **Select Subject Area** menu.

Subject Areas are the containers or domains of metadata from which analysis can be created. These are modeled by CaRT Administrators based on business requirements.

**Step Three**

After selecting a Subject Area from the drop-down list, you will be redirected to the Analysis Editor. The Subject Area appears in the left pane with multiple folders. Expand the subject area by clicking on the triangle next to the folder. This will display available elements that can be added to your analysis as columns.

The Analysis Editor is divided into four tabs:

- **Criteria Tab** – used to select columns and add filters to an analysis
- **Results Tab** – used for adding charts, graphs, etc. to an analysis
- **Prompts Tab** – used to add prompts that will populate a filter with different values
- **Advanced Tab** – provides administrative capabilities for an analysis
Step Four

To select an element as a column, double-click or drag the element from the subject area to the "Selected Columns" section.

Step Five

If you would like to customize the column such as changing the column heading or data format, hover over the properties icon of a column and select the Column Properties option.
Step Six

Once the desired columns have been selected and customized, click on the Results tab to view the results in the default table "view".

Step Seven

To add a new View or duplicate an existing one, click on one of these icons.

**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.

The **Compound Layout** is a logical representation of one or more Analysis objects (also known as Views). Views (ex: Title View, Table View) are containers of data or metadata representations usually based on the Subject Area criteria columns selected from the Criteria Tab. The Compound Layout is the parent container for a customizable assortment of Views from which you wish to comprise your Analysis.
**Step Eight**

If you would like to edit a view's properties, click the edit icon of the view. From there, click on the Table View Properties icon and customize any available properties.

![Table Properties dialog box](image)

**Step Nine**

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.

**IMPORTANT:** Be careful not to rename folders if you intend to share a report with another user within CaRT. Renaming a folder will cause the URL link to change and therefore will not be usable.