

## Working with Dashboards: Using Selection Steps

On some dashboard pages – most often on **Toolkit** and **Student** pages, but soon appearing on other dashboards - you will see a section at the bottom of particular analyses with a sentence that reads "Analysis contains no Selection Steps." This sentence is usually adjacent to the **Filters** view.

Selection steps are a type of filter that is applied to an analysis *after the results are generated*. On a dashboard page, you create the selection step and apply that post-analysis generation filter by right-clicking and choosing to either **Keep Only** or **Remove** rows of data directly or based on numeric values included in the rows.

Selection steps can go further and are more flexible than filters for users. They can also be applied to any column in the report. You're not limited to just those fields we've elected to use as prompts.

Selection steps can be used on nearly any dashboard. However, you'll only be able to see the steps you've applied when the **Selection Steps** view has been added to the analysis.

Let's look at an example. Here's the default view on the **Toolkit > Prog Fees and Diff Tuition > Prog Fees and Diff Tuition** dashboard (as of 1/13/2014):

Make your selections and click APPLY

Academic Year: 2014 | Term: --Select Value-- | Career: --Select Value-- | College: --Select Value-- | Plan Dept ID: --Select Value-- | Program: --Select Value-- | Program Dept ID: --Select Value-- | Person Name: --Select Value-- | Person ID: --Select Value-- | Residency: --Select Value-- | Apply | Reset

**Program Fees and Differential Tuition Revenue**  
Includes only program fees and differential tuition actually collected

Select a View: College Summary

Program Classification College Name	Fall 2013			Allocated Enrollment	Gross	Net
	Allocated Enrollment	Gross	Net			
Col Arch Plan & Landscape Arch	456.75	\$365,006	\$319,624	456.75	\$365,006	\$319,624
College of Agric and Life Sci	299.00	\$66,365	\$63,356	299.00	\$66,365	\$63,356
College of Education	1.00	\$375	\$375	1.00	\$375	\$375
College of Engineering	2,327.92	\$980,811	\$952,003	2,327.92	\$980,811	\$952,003
College of Fine Arts	999.00	\$304,991	\$279,082	999.00	\$304,991	\$279,082
College of Medicine - Tucson	702.00	\$11,003,833	\$10,145,007	702.00	\$11,003,833	\$10,145,007
College of Nursing	311.50	\$1,070,436	\$1,014,517	311.50	\$1,070,436	\$1,014,517
College of Pharmacy	354.75	\$2,356,730	\$2,292,146	354.75	\$2,356,730	\$2,292,146
College of Public Health	368.67	\$181,848	\$157,266	368.67	\$181,848	\$157,266
College of Social & Behav Sci	1,279.17	\$779,516	\$723,495	1,279.17	\$779,516	\$723,495
Eller College of Management	5,807.75	\$3,857,994	\$3,661,653	5,807.75	\$3,857,994	\$3,661,653
James E Rogers College of Law	426.50	\$2,707,673	\$2,114,809	426.50	\$2,707,673	\$2,114,809
Letters Arts & Sci Division	4.00	\$1,311	\$1,311	4.00	\$1,311	\$1,311
Science	1.00	\$750	\$750	1.00	\$750	\$750
<b>Grand Total</b>	<b>13,339.00</b>	<b>\$23,677,639</b>	<b>\$21,725,396</b>	<b>13,339.00</b>	<b>\$23,677,639</b>	<b>\$21,725,396</b>

Analysis contains no Selection Steps

Program Classification is not equal to / is not in Base, Undefined and Academic Year is equal to 2014

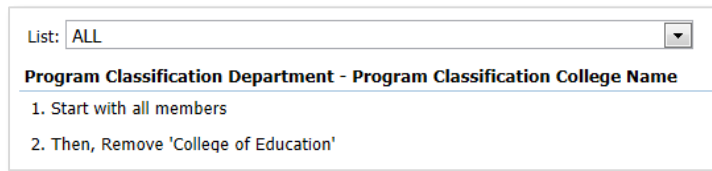
The prompt is included so you can see that the dashboard has just been filtered to the current Academic Year. Note the **Selection Steps** view immediately below the pivot table. The **Filters** view confirms the current filters.

### Creating a Simple Selection Step

Suppose you wish to remove one of the colleges. You could right-click on that college name in the **Program Classification College Name** column and elect to **Remove** that item, using this right-click menu:

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When you select the **Remove** option, the selected college will be removed. This action will appear in the **Selection Steps** view like this:



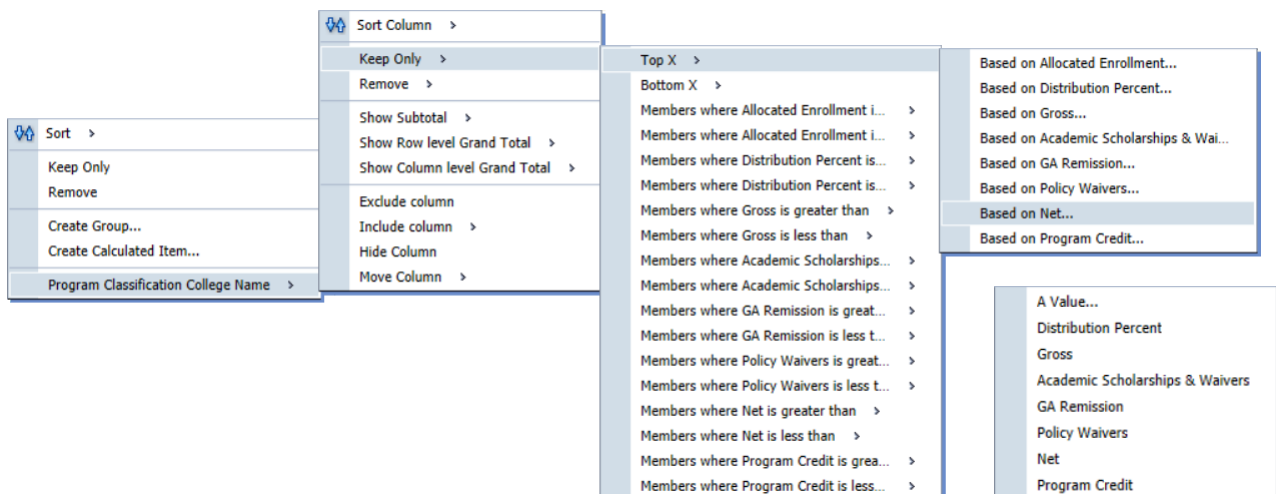
You could also have selected and removed multiple colleges with the help of the CTRL button on your keyboard.

Using the top-level **Keep Only** function would result in similar selection steps where you would retain only those item(s) you wished to retain.

If you think about it for a moment, you will realize that you could have accomplished the same results by using the prompts at the top of the dashboard page. With selection steps, however, you have the ability to see the data you're electing to keep or electing to remove before you filter it out. Then, when you're ready, you right-click and make your selections. You're not constrained to filtering on just those fields we've selected for prompts, either. You can set up selection steps on nearly any data column.

### Creating a More Powerful Selection Step

Selection steps can be much more powerful than that, however. It depends how you use them. Staying on that same dashboard page, you could right-click in the **Program Classification College Name** column and select **Program Classification College Name**, then either **Keep Only** or **Remove**. You would see this menu stack:



If you were to select something other than **Top X** or **Bottom X** from the third-level menu, you would see the alternate fourth-level menu depicted on the lower right.

For example, you can elect to **Keep Only** the **Top X** number of colleges **Based on** one of the dollars columns, such as the **Net** column. The system will prompt you for a number to fill in the "X." If you enter a "5," you will end up with the top five colleges at the university based on the net program fees and differential tuition they collected in academic year 2014.

The analysis now looks like this. Note the information in the **Selection Steps** view. Note, too, that the **Filters** view didn't change. You're creating selection steps, not filters.

Program Fees and Differential Tuition Revenue  
Includes only program fees and differential tuition actually collected

Select a View: College Summary

Program Classification College Name	Fall 2013			Allocated Enrollment	Gross	Net
	Allocated Enrollment	Gross	Net			
College of Medicine - Tucson	702.00	\$11,003,833	\$10,145,007	702.00	\$11,003,833	\$10,145,007
College of Nursing	311.50	\$1,070,436	\$1,014,517	311.50	\$1,070,436	\$1,014,517
College of Pharmacy	354.75	\$2,356,730	\$2,292,146	354.75	\$2,356,730	\$2,292,146
Eller College of Management	5,807.75	\$3,857,994	\$3,661,653	5,807.75	\$3,857,994	\$3,661,653
James E Rogers College of Law	426.50	\$2,707,673	\$2,114,809	426.50	\$2,707,673	\$2,114,809
<b>Grand Total</b>	<b>7,602.50</b>	<b>\$20,996,666</b>	<b>\$19,228,132</b>	<b>7,602.50</b>	<b>\$20,996,666</b>	<b>\$19,228,132</b>

List: ALL

Program Classification Department - Program Classification College Name

- Start with all members
- Then, Keep only members of "Program Classification Department","Program Classification College Name" for Top 5 based on "Fact OIRPS Revenue and Aid","Net Revenue"

Program Classification is not equal to / is not in Base, Undefined and Academic Year is equal to 2014

You can add as many selection steps as you wish to a particular dashboard analysis, continually limiting the data until you see just the values you need. The selection steps are applied in the order you create them, and the **Selection Steps** view will keep track of each step as you make it.

If you review the menu at the bottom of the previous page, you'll see that you have many, many options for using selection steps. You can keep or remove those items where one set of dollar values is greater than or less than some other set of dollar values, or where the dollar values in a particular column are greater than or less than some number you select.

In the example here, two selection steps were applied. In the first, we kept only those colleges where the Allocated Enrollment number was greater than 400. Then, from that subset of colleges, we further elected to keep only those colleges where Net revenue was greater than \$300,000.00.

Program Fees and Differential Tuition Revenue  
Includes only program fees and differential tuition actually collected

Select a View: College Summary

Program Classification College Name	Fall 2013			Allocated Enrollment	Gross	Net
	Allocated Enrollment	Gross	Net			
Col Arch Plan & Landscape Arch	456.75	\$365,006	\$319,624	456.75	\$365,006	\$319,624
College of Engineering	2,327.92	\$980,811	\$952,003	2,327.92	\$980,811	\$952,003
College of Medicine - Tucson	702.00	\$11,003,833	\$10,145,007	702.00	\$11,003,833	\$10,145,007
College of Social & Behav Sci	1,279.17	\$779,516	\$723,495	1,279.17	\$779,516	\$723,495
Eller College of Management	5,807.75	\$3,857,994	\$3,661,653	5,807.75	\$3,857,994	\$3,661,653
James E Rogers College of Law	426.50	\$2,707,673	\$2,114,809	426.50	\$2,707,673	\$2,114,809
<b>Grand Total</b>	<b>11,000.08</b>	<b>\$19,694,833</b>	<b>\$17,916,592</b>	<b>11,000.08</b>	<b>\$19,694,833</b>	<b>\$17,916,592</b>

List: ALL

Program Classification Department - Program Classification College Name

- Start with all members
- Then, Keep only members of "Program Classification Department","Program Classification College Name" where "CSW - Student Records - Differential Net Tuition Revenue","Fact OIRPS Revenue and Aid","Program Credit" is greater than 400
- Then, Keep only members of "Program Classification Department","Program Classification College Name" where "CSW - Student Records - Differential Net Tuition Revenue","Fact OIRPS Revenue and Aid","Net Revenue" is greater than 300000

Program Classification is not equal to / is not in Base, Undefined and Academic Year is equal to 2014

## Working with Dashboards: Using Selection Steps

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As mentioned above, selection steps can be very powerful and very revealing. They work in conjunction with – and after – any actual filters that have been applied to the dashboard.

### Saving Selection Steps

You can save selection steps by using the **Page Options** button in the upper-right corner of the dashboard. Just click that button and choose the **Save Current Customization** option. Remember that all of the changes you've made to the dashboard will be retained.

### Removing Selection Steps

Removing selection steps can be done in two ways.

1. Leave the dashboard page and come back (if you need to).
2. Click the **Page Options** button in the upper-right corner of the dashboard and select **Clear My Customization**.

Either method will clear any and all changes you've made to the dashboard, including specific filters, moving of columns, etc. You cannot remove just one selection step or customization.

Enjoy!