UITS
University Information Technology Services

UAccess Analytics

Next Steps: Creating Action Links

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About this Booklet

This UAccess Analytics booklet is designed to help you become familiar with creating action links. For more information, refer to the appropriate sections of the UAccess Analytics online Help documentation.

This booklet is generic by necessity, but will provide you with the information you need to construct and deconstruct View Selectors.

For information on workshops in which you can learn how to build basic analyses and dashboards, as well as other brown bag demonstrations, please go to the Workshops and Training Team website at http://workshops.arizona.edu.

Access to Analytics Data

Request for Individual access to UAccess Analytics can be submitted to **https://request.uaccess.arizona.edu**.

UAccess Community

The UAccess Community is an online networking resource available to everyone on campus who use UAccess systems.

If you have an official UA email address, you can request membership in the UAccess Community. Just go to http://community.uaccess.arizona.edu and click the Sign Up link in the upper right corner of the screen.

Once your membership is confirmed – usually within a few hours – you'll have access to valuable information about all of the various aspects of the UAccess systems. You'll want to join one or more of the groups within the Community, because that's where the value comes in.

There is a Welcome Center available through a link on the Home page, as well as a great set of frequently asked questions (FAQs) linked through the top menu. Be sure to browse through the different Forums, check out upcoming Events, and peruse the extensive Resources provided through the Community.

Take advantage of the opportunity and become a member of the UAccess Community now.

Prerequisites

You should be familiar with creating a basic analysis, probably having gone through the Basic Reports and Dashboards workshop at some point.

If you haven't actually created analyses of your own, you should certainly be familiar with the process.

At a minimum, you should have read and understand the contents of the **UAccess Analytics: Basic Reports and Dashboards** booklet. You can download a copy of that document from **UAccess Community > Resources > Analytics Resources**.

What is an Action Link?

An Action Link is a link you create in a report that will allow a viewer of that analysis to click a value which will then open or navigate to a related analysis.

Action Links can be used to open another analysis, a dashboard, or even a web page. In the example in this booklet, you will create an action link to navigate from a summary analysis to a related detail analysis.

Multiple action links can be created for any particular column or data value, allowing a user to navigate to one of several different analyses, dashboards, etc. When multiple links are created, the user will be presented with a menu listing those links.

Overview

There are just a few basic steps you need to accomplish to get your analysis working with action links. Of course, there are many intermediate steps, but it's helpful to start with a quick outline.

1. **Create the initial analysis** and determine what data column or values will allow the user to navigate to the other analysis.
2. **Create the second analysis** to which the user will navigate when they click the data column or value in the first analysis.
3. **Edit the initial analysis**, creating the action link from the specific data identified in step 1 to the analysis created in step 2.

Premise

You've Already Created Your Summary Analysis

You have created a very useful summary analysis showing the breakdown of employees in your college or department by ABOR Job Description, and have included both FTE Count and Headcount.

Employee/Faculty ABOR Summary

ABOR Job Description	FTE Count	Headcount
Administrative	9.80	10
Classified Staff	12.75	14
Graduate Assistant/Associate	3.50	7
Service Professional	38.35	39
Student Worker	1.13	4
Grand Total	**65.53**	**74**

Analysis contains no Selection Steps

College Id for Job Department is equal to AADV

You've also created a dashboard prompt and put the analysis and prompt on your shared dashboard page. They're working well.

You then realize it would be useful to also have a detail version of that analysis available for users. The detail version would show employee names, IDs, demographic information, et cetera.

Since most people only need to see the summary report, you don't necessarily want to put the detail analysis directly on the dashboard page. You do need to make it available somehow, though.

You decide to use an Action Link.

Determine Which Data Column to Use as an Action Link

Take a look at your summary analysis and determine how you wish your action links to work. Which data column should you use? Also, will you be passing any information from this analysis to the detail analysis as a filter? That's an option.

In this case, you'd like the user to be able to click on any one of the specific **ABOR Job Descriptions** or on that column heading. When they click a specific value, you'd like your detail report to open and have it filtered to the specific ABOR Job Description the user selected.

If the user clicks on the ABOR Job Description column heading, however, you'd like the detail analysis to open listing all of the employees in your department.

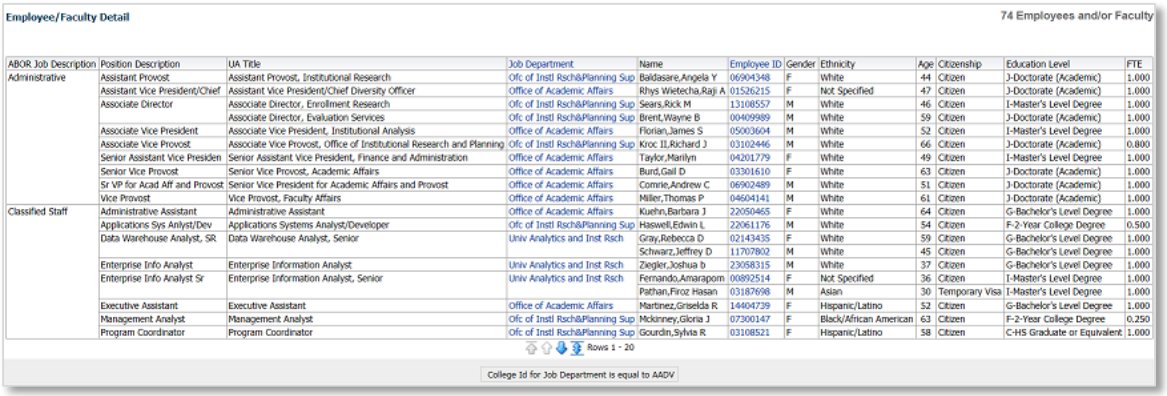
You can set up your analyses to do just that.

Create the Detail Analysis

Now you need to create your detail analysis, which is the analysis that will open when users click a link in the summary analysis.

Since this particular detail analysis uses the same subject area as the summary analysis, you might start with the summary analysis and use the **Save As** option to make a copy of the summary analysis. That way, you'll have a good starting point for the detail report. You'll have the same prompted filters and some of the same columns already in place, which can be useful.

Take your time and build the analysis as you need, putting all of the data columns in, getting your filters created properly to work on a dashboard page, and making it look the way you need it to look.



Employee/Faculty Detail — 74 Employees and/or Faculty

ABOR Job Description	Position Description	UA Title	Job Department	Name	Employee ID	Gender	Ethnicity	Age	Citizenship	Education Level	FTE
Administrative	Assistant Provost	Assistant Provost, Institutional Research	Ofc of Instl Rsch&Planning Sup	Baldasare,Angela Y	06904348	F	White	44	Citizen	J-Doctorate (Academic)	1.000
	Assistant Vice President/Chief	Assistant Vice President/Chief Diversity Officer	Office of Academic Affairs	Rhys Wietecha,Raji A	01526215	F	Not Specified	47	Citizen	J-Doctorate (Academic)	1.000
	Associate Director	Associate Director, Enrollment Research	Ofc of Instl Rsch&Planning Sup	Sears,Rick M	13108557	M	White	46	Citizen	I-Master's Level Degree	1.000
		Associate Director, Evaluation Services	Ofc of Instl Rsch&Planning Sup	Brent,Wayne B	00409989	M	White	59	Citizen	J-Doctorate (Academic)	1.000
	Associate Vice President	Associate Vice President, Institutional Analysis	Office of Academic Affairs	Florian,James S	05003604	M	White	52	Citizen	I-Master's Level Degree	1.000
	Associate Vice Provost	Associate Vice Provost, Office of Institutional Research and Planning	Ofc of Instl Rsch&Planning Sup	Kroc II,Richard J	03102446	M	White	66	Citizen	J-Doctorate (Academic)	0.800
	Senior Assistant Vice Presiden	Senior Assistant Vice President, Finance and Administration	Office of Academic Affairs	Taylor,Marilyn	04201779	F	White	49	Citizen	I-Master's Level Degree	1.000
	Senior Vice Provost	Senior Vice Provost, Academic Affairs	Office of Academic Affairs	Burd,Gail D	03301610	F	White	63	Citizen	J-Doctorate (Academic)	1.000
	Sr VP for Acad Aff and Provost	Senior Vice President for Academic Affairs and Provost	Office of Academic Affairs	Comrie,Andrew C	06902489	M	White	51	Citizen	J-Doctorate (Academic)	1.000
	Vice Provost	Vice Provost, Faculty Affairs	Office of Academic Affairs	Miller,Thomas P	04604141	M	White	61	Citizen	J-Doctorate (Academic)	1.000
Classified Staff	Administrative Assistant	Administrative Assistant	Office of Academic Affairs	Kuehn,Barbara J	22050465	F	White	64	Citizen	G-Bachelor's Level Degree	1.000
	Applications Sys Anlyst/Dev	Applications Systems Analyst/Developer	Ofc of Instl Rsch&Planning Sup	Haswell,Edwin L	22061176	M	White	54	Citizen	F-2-Year College Degree	0.500
	Data Warehouse Analyst, SR	Data Warehouse Analyst, Senior	Univ Analytics and Inst Rsch	Gray,Rebecca D	02143435	F	White	59	Citizen	G-Bachelor's Level Degree	1.000
				Schwarz,Jeffrey D	11707802	M	White	45	Citizen	G-Bachelor's Level Degree	1.000
	Enterprise Info Analyst	Enterprise Information Analyst	Univ Analytics and Inst Rsch	Ziegler,Joshua b	23058315	M	White	37	Citizen	G-Bachelor's Level Degree	1.000
	Enterprise Info Analyst Sr	Enterprise Information Analyst, Senior	Univ Analytics and Inst Rsch	Fernando,Amarapom	00892514	F	Not Specified	36	Citizen	I-Master's Level Degree	1.000
				Pathan,Firoz Hasan	03187698	M	Asian	30	Temporary Visa	I-Master's Level Degree	1.000
	Executive Assistant	Executive Assistant	Office of Academic Affairs	Martinez,Griselda R	14404739	F	Hispanic/Latino	52	Citizen	G-Bachelor's Level Degree	1.000
	Management Analyst	Management Analyst	Ofc of Instl Rsch&Planning Sup	Mckinney,Gloria J	07300147	F	Black/African American	63	Citizen	F-2-Year College Degree	0.250
	Program Coordinator	Program Coordinator	Ofc of Instl Rsch&Planning Sup	Gourdin,Sylvia R	03108521	F	Hispanic/Latino	58	Citizen	C-HS Graduate or Equivalent	1.000

Rows 1 - 20

College Id for Job Department is equal to AADV

There is one additional, specific thing you need to do to make this analysis work as described above. You want the detail analysis to be filtered to the value selected or clicked in the summary report.

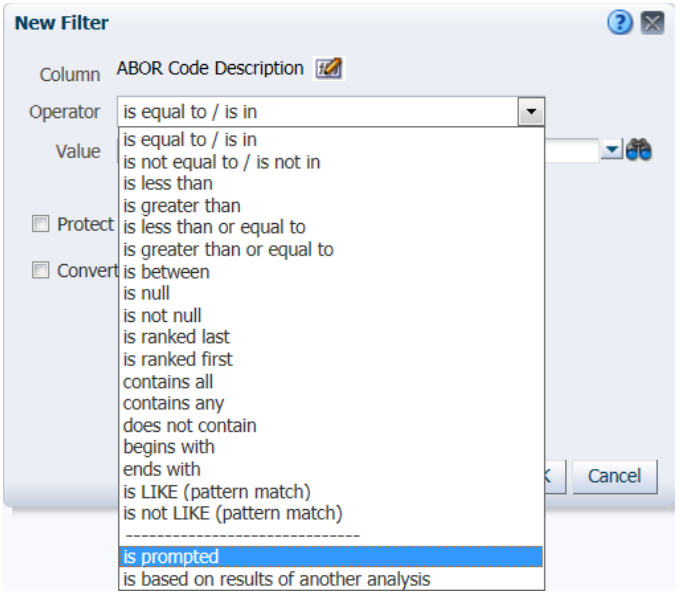
Setting Up the Detail Analysis to Accept a Filter from an Action Link

When you were thinking about how you wanted the action links to work, you wanted the user to be able to click on a value – in this case any of the individual ABOR Job Description values – which would open a second analysis that would provide a list of only those employees who actually had that particular job description.

That means that the value the user selects or clicks in the summary analysis needs to act as a filter for the detail analysis. If the user clicks the ABOR Job Description column heading, no filter value would be passed through. The user would see the list of all employees.

Procedure

1. **Edit** the detail analysis and navigate to the **Criteria** tab.
2. **Click** the **Options** button for the ABOR Job Description column and select **Filter**.
3. **Click** the drop down arrow for the **Operator** field.
4. **Select** the **is prompted** option. Click **OK**.



The "is prompted" option is what allows this detail analysis to pick up the selected value coming from the summary analysis.

You're not done yet, but you're making progress!

Save your detail analysis and make a note about the name of the file and the path to that analysis.

Creating the Action Links

Now that you've created both the summary and the detail analyses, you can create the action links. You do this in the summary analysis.

Procedure

1. **Open** the summary analysis.
2. On the **Criteria** tab, click the **Options** button for the **ABOR Job Description** data column.
3. Select **Column Properties** from the menu.
4. On the Column Properties screen, click the **Interaction** tab.

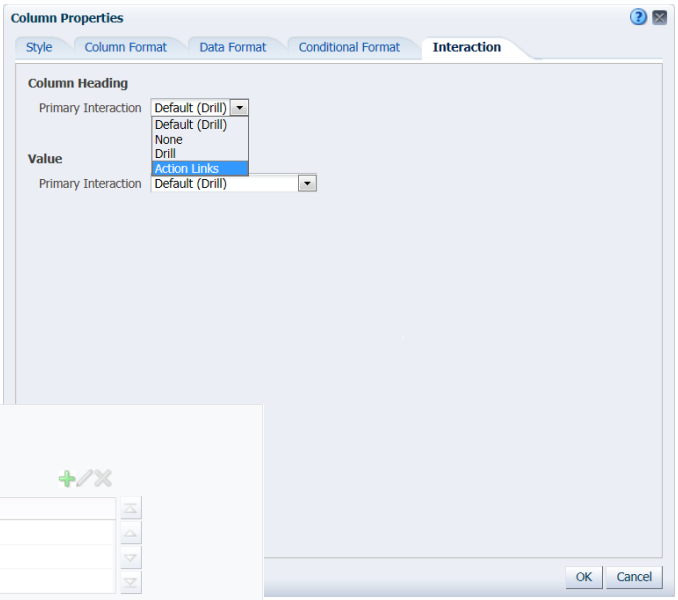
   You can create or set an action for the Column Heading, the Values, or both. In this case, you want to set an action for both.

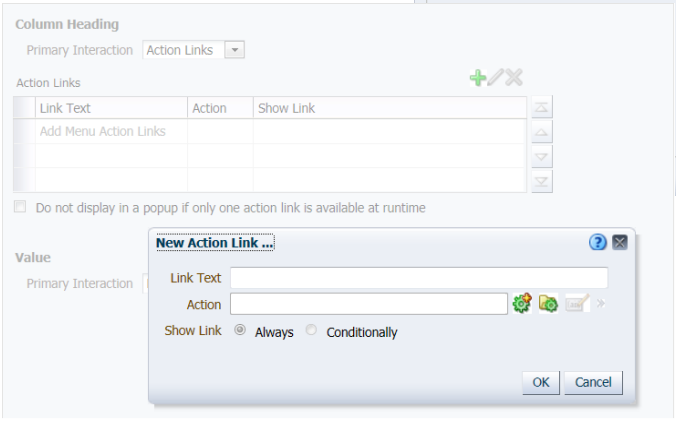
Creating the Action Link for the Column Heading

Procedure

1. Click the drop-down arrow for the **Column Heading: Primary Interaction** field.
2. Click the **Action Links** option.

   The screen changes to allow you to create and show your action links.

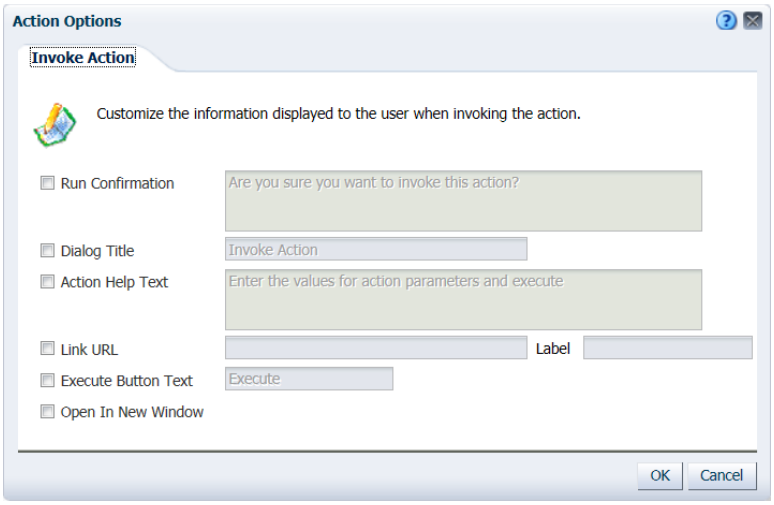




3. Click the green **Add Action Link** plus sign button (**+**) to begin creating your first action link.
4. Click the **Create New Action** button on the **New Action Link** screen. The button looks like a green gear with a gold plus sign on it.
5. Select **Navigate to BI Content** from the menu.
6. On the **Select BI Content for Action** screen, navigate to the location of your saved detail analysis and select that report. Click **OK**.

   The **Create New Action** screen changes, showing you the content you've selected. It also offers you an **Options** button.

7. Click the **Options** button.
8. You can probably ignore most of the options on this screen. The one that you might be interested in would be the bottom option that would open the detail analysis in a new window. Select that option if you wish. Click **OK** or **Cancel**, as appropriate.



9. Click **OK** on the **Create New Action** screen. The system will take you back to the **New Action Link** screen. You're nearly done with this action link.
10. You needn't make any changes on the **New Action Link** screen. Click **OK**.
11. The system returns you to the **Interaction** tab on the **Column Properties** screen.

    Repeat steps 1 – 11 to create another action link if you want the user to be able to navigate to an alternative analysis or dashboard.

    There is one option here that you should select if this is the only action link you're going to create for the Column Heading.

    Select the **Do not display in a popup if only one action link is available at runtime** option.

Creating the Action Link for the Column Values

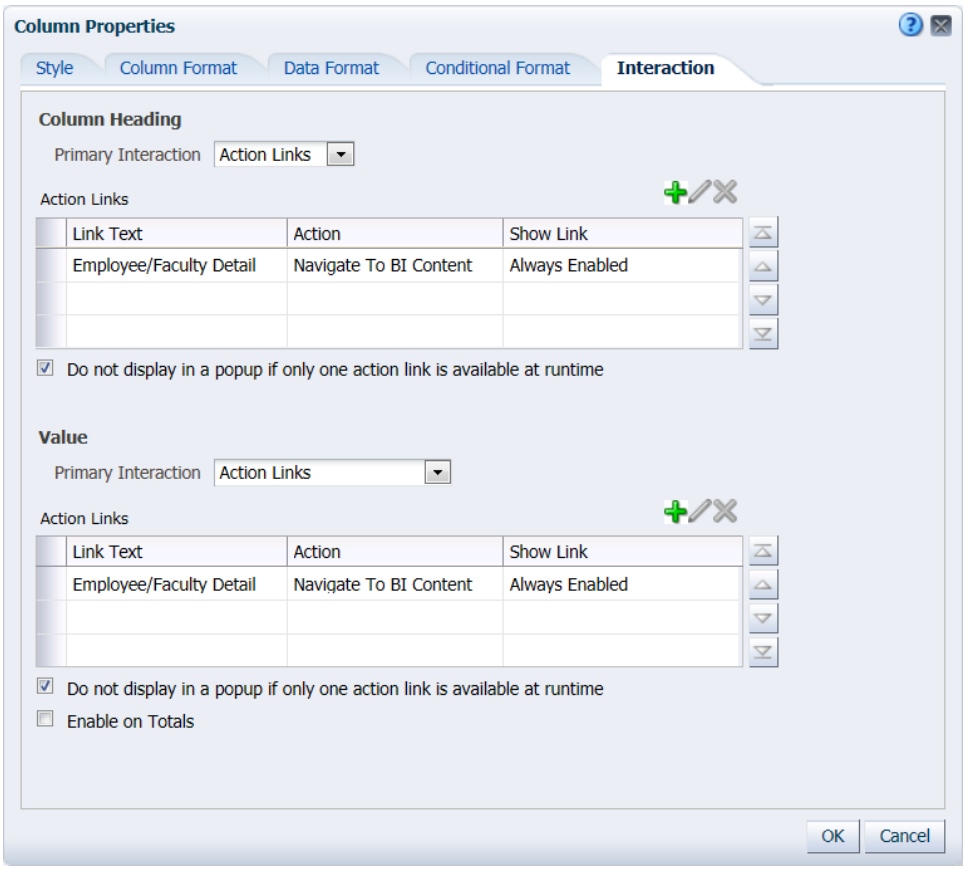
Creating the action link for the column values follows exactly the same procedure you followed for the Column Header.

Procedure

Repeat steps 1 – 11, as appropriate, from the section above.

Finishing Up

Here's what the **Interaction** tab of the **Column Properties** screen should look like when you're done creating the action links for both the **Column Heading** and **Value** sections.



Procedure

1. Click **OK** on the Column Properties screen.
2. Save the summary analysis.
3. If you haven't done so already, create a dashboard page for the summary analysis and any associated dashboard prompt.
4. Run the dashboard page and test the action links on the summary analysis.