

## Next Steps: Mashing Your Data into Analytics

Have you ever wanted to be able to use some of your own departmental data in conjunction with data that comes from UAccess Analytics? Have you wanted to do that without having to continually download data from Analytics, then trying to merge it with your own data in Excel?

With Oracle Business Intelligence 12c – or what we’ve been calling **Masher** – you can! Upload your data one time (and refresh it if it changes) and combine it – mash it! – with data from any single subject area. You can also use that uploaded data independent of any subject area.

### 1. Create your Mashable Data in a Spreadsheet

The first thing you must do is gather the data you wish to use and get it into a spreadsheet. We’ll assume you’re using Microsoft Excel. The data in the spreadsheet would typically be data that is not otherwise available in Analytics. With the exception of a single data column, don’t waste space and columns by replicating data you can already find in Analytics. Besides that note, there are just a couple of things you should keep in mind.

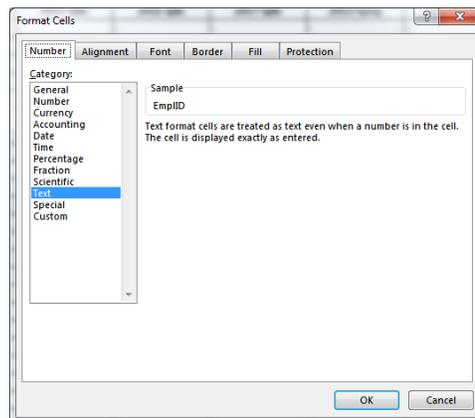
- a. One of the columns in the spreadsheet must contain data that will be used to match records with data coming from Analytics. If you’ve ever used Microsoft Access, this column would be the primary key. For example, if you’re going to mash department-collected employee data with data from an employee-based subject area, you might include Employee IDs. If you’re mashing financial data, you might include an account number column. Research data? Proposal or Grant IDs.

There’s no hard-and-fast rule as to what data you must match, but the data you wish to match must consist of unique values which can be matched with existing Analytics data. For example, creating a Last Name data column as a matching column wouldn’t necessarily be a good idea. How many Smiths are there? Use NetID or EmplID instead.

- b. Any numeric data that is not meant to be read as numbers but, rather, could be identified or thought of as numeric text must be formatted in Excel to be **Text** data before you try to import that data into Masher.

Examples of numeric text would include **Employee or Student IDs, Account Numbers, Object Codes**, etc.

Highlight the data column in Excel, right-click that column and select **Format Cells** from the menu. On the Format Cells screen, select the **Number** tab, then select **Text** from the **Category** field.



In the case of any specific numeric text value that is supposed to include one or more leading zeroes – things like employee IDs and account numbers – you’ll have to manually add those zeroes once you’ve changed the format of the data in that column to **Text**.

- c. You can have as many rows and columns of data as you wish.
- d. The spreadsheet must be saved with an **XLSX** (Microsoft Office Open XML Workbook) file extension.
- e. The Excel file must not exceed 50 MB in size.

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### 2. Generate a Password for Masher

You're able to use your regular NetID, but not your regular password, with Masher. You'll have to use a custom password for the Masher software. If you've already done this, you needn't do it a second time.

- a. In Analytics, go to the Masher dashboard at **Dashboards > UAccess Analytics > Masher**. Click the **Secondary Password Generator** link.
- b. Log in with your UA NetID.
- c. The system will open and show you a cryptic 16-characters-plus-dashes password.
- d. Click the little clipboard icon in the corner of the yellow password box to copy the password. You should also heed the recommendation that you save your new password in **Stache**, which is the UA's secure password storage site. That way you'll have access to your Masher password whenever you need it.
- e. Click the link to go to Stache, where you need to create a new entry.

### 3. Import your Spreadsheet Data into Masher

- a. In Analytics, click the **Masher** link on the Masher dashboard you opened in the steps above.
- b. Log in to Masher using your NetID and the password you created in step 2c. When Masher opens, you will be on the **Home** screen. Feel free to collapse the large Getting Started banner, if you wish.
- c. Note the Tip box on the home screen. Adding a file to Masher couldn't be easier. Open a **File Explorer** or **Finder** window on your computer, then locate your Excel spreadsheet file. Drag-and-drop your Excel spreadsheet onto the Home page in Masher. Your file will be automatically uploaded!

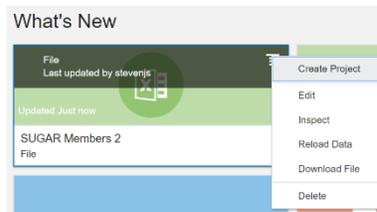
Tip: Create a new Data Set by simply dropping your file anywhere on this page

Without having to do anything more, your newly-created-and-uploaded data set is now available for use in Analytics as a stand-alone data set. You should be able to open Analytics and create a new analysis using just the data in that data set, if you wish.

### 4. Linking Your Data Set to an Analytics Subject Area

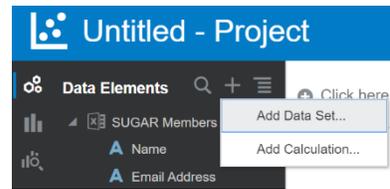
Typically, you would want to use your newly-uploaded data set in conjunction with an established subject area in Analytics. That was probably your motive all along. You just have to link your data set to that subject area.

- a. You should see a green tile in the **What's New** section of the Masher screen. That tile corresponds to the data set you just uploaded. Hover your mouse pointer over that tile and click the **Actions** menu in the upper right corner of the tile. Select **Create Project** from the menu. A new browser tab will open with an **Untitled-Project** started for you.



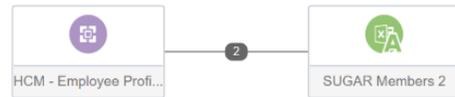
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- b. Click the **Add** (plus sign) button at the top of the black Data Elements pane. Select **Add Data Set** from the menu.
- c. On the **Add Data Set** screen, click the **Subject Areas** tab to access the list of all subject areas available to you in Analytics. Use the **Search** function to search for and select the subject area you wish to link to your new data set.



- d. Click the **Add to Project** button in the lower-right corner of the screen. The Add Data Set screen will eventually close and you'll have returned to the untitled project screen.

- e. Click the **Menu** button in the Data Elements pane and select **Data Diagram**. You should now see two tiles on your screen representing your data set (green icon) and the linked subject area (purple icon). A black line with a numbered "bubble" should link the two datasets. The number represents the number of data columns in your data set that are dynamically linked.



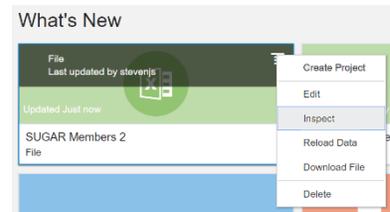
- f. Click the numbered bubble to show the connection that's been established between the two data sources. You can delete the matches or extend a dimension to add another match to the data. Click OK.

At this point, you have created the spreadsheet, uploaded it, and linked it to a subject area within Masher. Only one subject area can be linked to any uploaded data set in Masher.

5. Add Permissions to Your Data Set

Will you be creating an analysis for use on a shared dashboard page? Perhaps your department or college dashboard? If so, you'll need to add some permissions so that viewers of those dashboards can see your data.

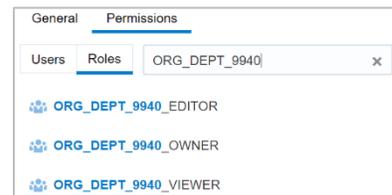
- a. Just as you did when you linked your data set to a subject area, hover your mouse pointer over the green tile for your data set. Click the **Actions** menu and select **Inspect**.



- b. On the **Data Set** screen, click the **Permissions** tab.

- c. Click the **Roles** option and, in the **Search** field, type **ORG\_COLLEGE** or **ORG\_DEPT**, as appropriate. At that point, the search becomes more problematic to describe in this document. You need to know your college code or your department number.

If you are searching for your department, you could continue that search string as **ORG\_DEPT\_9940**, for example. You'd see one, two, or three options for that department. You should select all of the options to make sure that all of your department employees can see the data, provided they've been granted access to the dashboard.

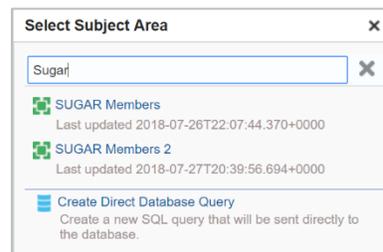


If you're unsure of your college or department code, you can check the **Security > Security > ORG Roles** dashboard in Analytics to see what organizations you belong to. Those might represent the groups you'd need to select

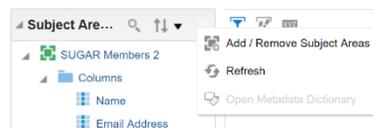
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6. Create Your Analysis in UAccess Analytics

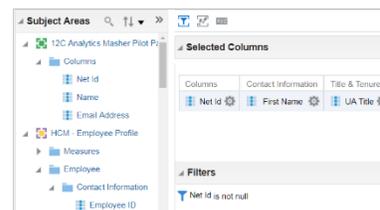
- a. In UAccess Analytics, click the **New** menu item on the global header, then select **Analysis**. Scroll all the way to the bottom of the Subject Area list or use the new **Search** function to find your newly-uploaded-and-available data set, identified with a green icon. If you use search, it may take a few moments for the system to locate your data set.
- b. Select the data set that you just uploaded. Analytics will take you to the normal analysis-building screen. You can create an analysis using just the uploaded data, or can create an analysis that will combine your data with Analytics data.
- c. If you wish to create a stand-alone analysis using just your data set, you can do so from here.



If you wish to mash your data with Analytics data, click the **Show More Buttons** button at the top of the Subject Areas pane, then select **Add/Remove Subject Areas**. The only subject area available to be linked is the subject area you identified within Masher. Select that subject area and click OK. Only one subject area can be linked to any uploaded data set in Masher.



- d. Create your analysis as usual. If you wish to limit the rows of data in your analysis to only those rows that match data in your uploaded spreadsheet, you *may* need to create an appropriate filter. In this case, I've added a filter for the Net Id data column, which came from my uploaded data. The filter is **Net Id is not null**. If you don't create this filter, or a similar filter, you may get all of the matching data from the entire subject area. In this situation, if the filter hadn't been added to the analysis, the results would list every employee first name in the HCM – Employee Profile subject area, with the matching titles, but would only show Net Ids from the uploaded data set. Adding the filter limits the data to just the number of rows you have in the uploaded data set.



7. Refreshing the Uploaded Data

From time to time, you may need to update the data in your original spreadsheet. At that point, you'll also need to refresh that same data in Masher so that the refreshed data is available in UAccess Analytics.

- a. In Analytics, click the **Masher** link on the Global Header in Analytics.
- b. Log in to **Masher**.
- c. Click the **Navigator** button in the upper left-hand corner of the Masher Home screen. It's above the "house" button.
- d. Click the **Data** option in the black pane on the left.



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- e. Locate the data set you need to reload. Hover your mouse pointer over that data set, then click the **Actions** button on the far right. Select **Reload Data** from the menu.
- f. Click **Select File**, then identify the file that contains the modified data. Masher will reload the data. You should get an indication from the system that the reload was successful, along with a count of the rows of data that were loaded. Click **OK**.
- g. Run your analysis in UAccess Analytics. You may need to click the Refresh button on the Compound Layout screen once or twice, but the refreshed data should be available to Analytics within a few moments.

