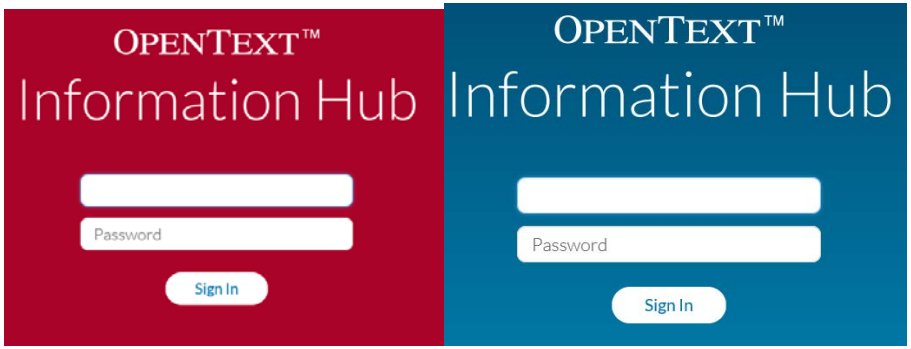
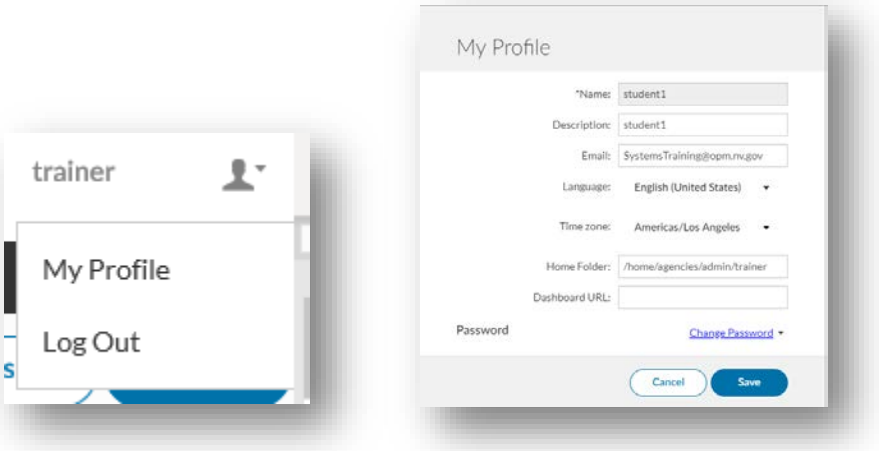
LOGGING IN



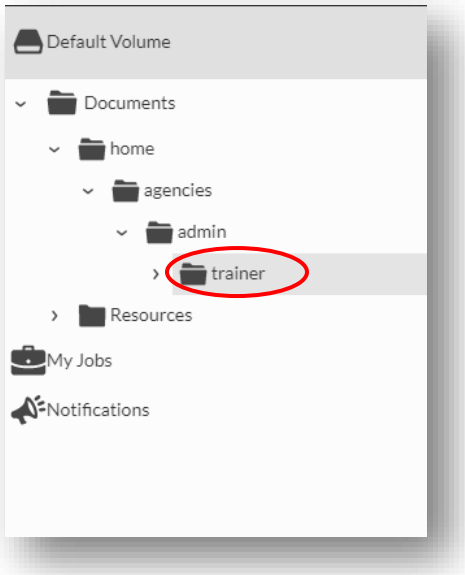
- Training Environment: http://hubcc1test.state.nv.us:8700/iportal/login.do
- At Your Agency: http://hub.state.nv.us:8700/iportal/login.do

MY PROFILE – Log Out, Update Email, Change Password



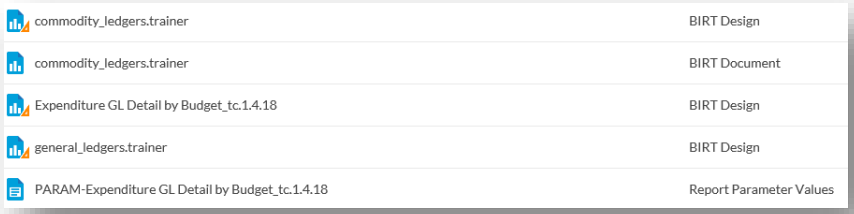
IHUB NOTES

LEFT MENU (Folder Screen) – Access Your Folder, View Scheduled Reports



- Your folder will be within the "agencies" folder and your agencies folder.
- "**My Jobs**" folder shows completed, running, pending & scheduled reports.

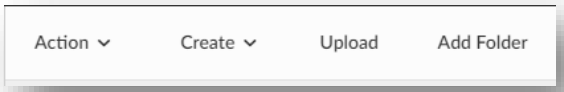
ITEMS IN FOLDER – Types of Reports, Navigating Tabs



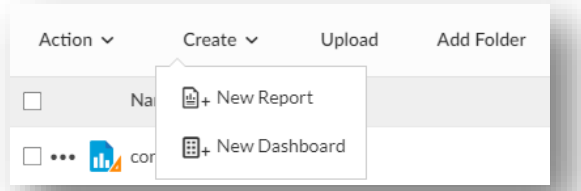
- **BIRT Design** = Master Report; **Report Parameter Values** = customized version of Master Report; **BIRT Document** = doesn't allow parameter changes, just runs by set parameters (opens in separate browser tab).

IHUB NOTES

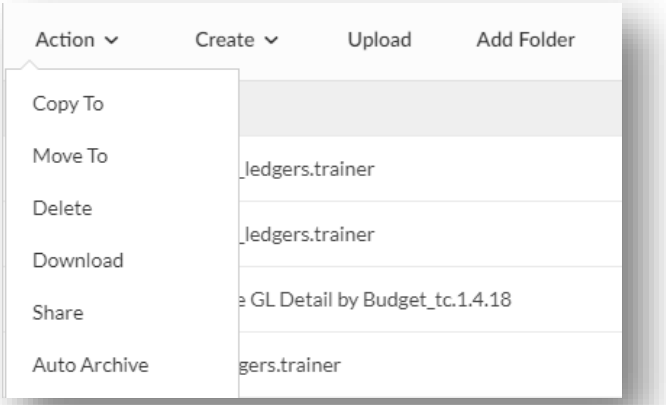
MAIN MENU



- **Add Folder** = within the folder you are in; **Upload** = only for SCO



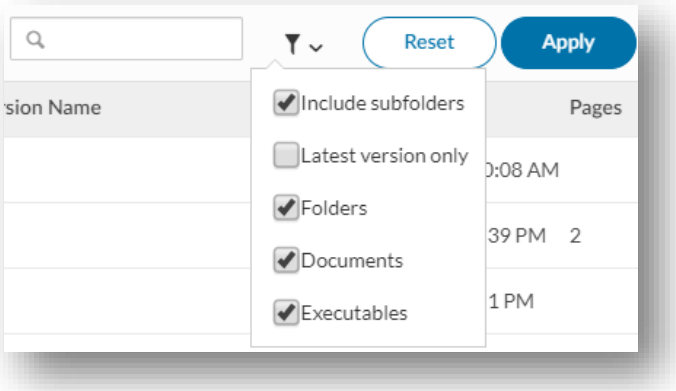
- **Create** (**New Report** & **New Dashboard**) = only for superusers



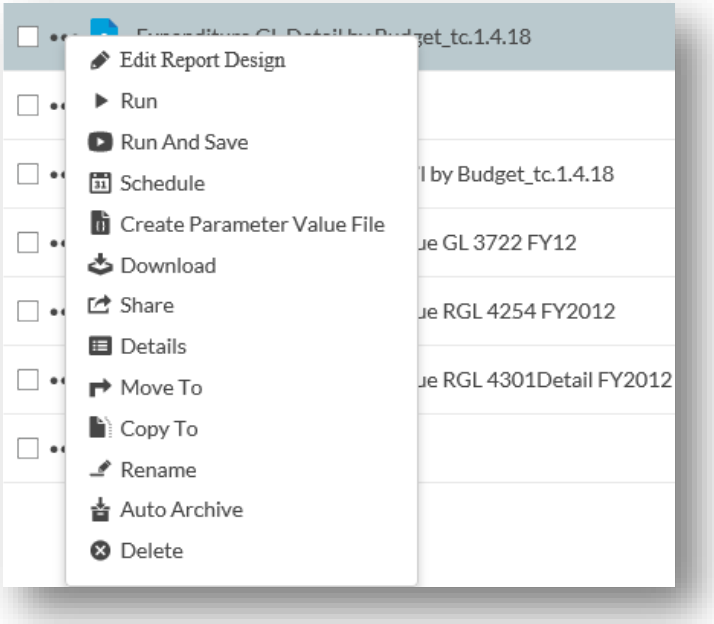
- **Copy To** keeps original in current folder; **Move To** removes it from current folder; **Delete** includes confirmation pop up; **Download** gives you "raw" BIRT Design document (not download data); **Share** can share with other iHub users directly; **Auto-archive** can auto delete by days/hours or date and can archive before deleting (doesn't include dependent files).

IHUB NOTES

SEARCH BOX AND FILTER ICON



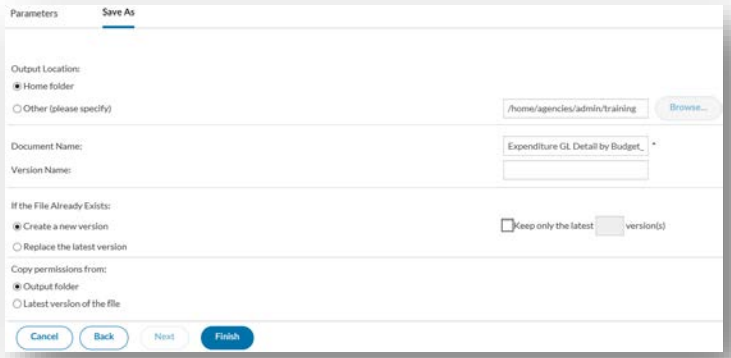
3 DOT MENU



- **Edit Report Design** = only for SCO/superusers; **Run** = same as clicking on report (opens report to parameter page)

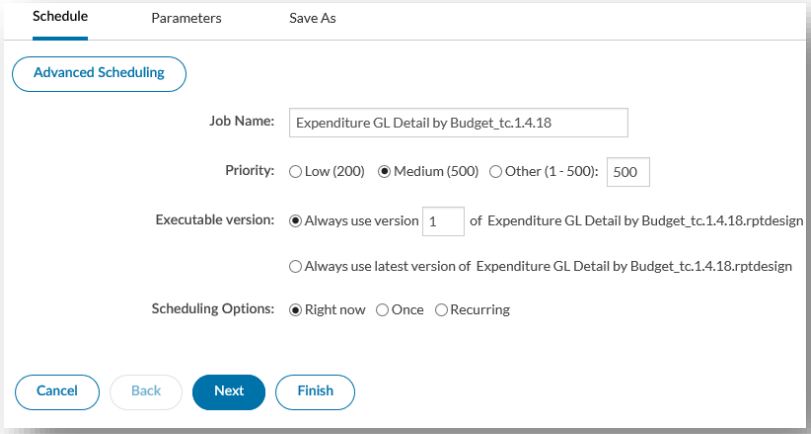
IHUB NOTES

3 DOT MENU: RUN AND SAVE



- Creates new version with parameters set. Changes it to BIRT Document with no parameters page (just runs when you open it). Allows you to save it in selected location and rename the file. Also runs the new report.

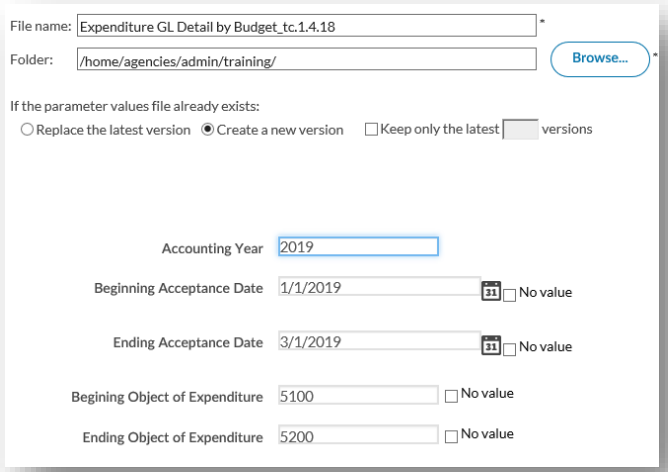
3 DOT MENU: SCHEDULE



- Schedule report right now, once, or reoccurring. Can rename scheduled file.
- Reoccur everyday, weekdays, specific day of week, 1st or last day of month
- Can set specific time to run and set a start and stop date.

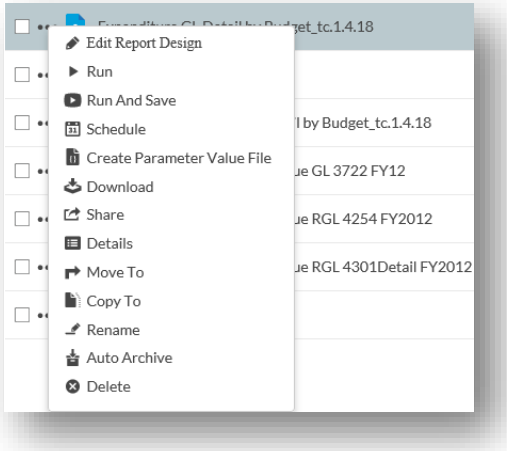
IHUB NOTES

3 DOT MENU: CREATE PARAMETER VALUE FILE



- Uses "master" BIRT Design to create variations of file with new parameters

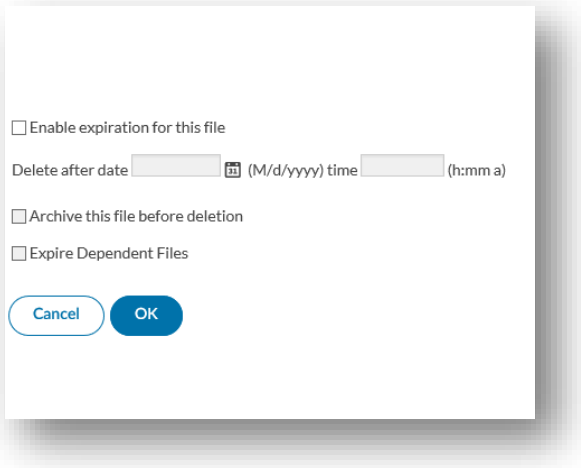
3 DOT MENU: DOWNLOAD/SHARE/DETAILS/MOVE TO/COPY TO/RENAME/ DELETE



- **Download** only downloads HTML; **Details** gives details on file
- **Share**, **Move To**, **Copy To, Delete** is same as what's on "Action" top menu (except you can change document name when moving or copying)

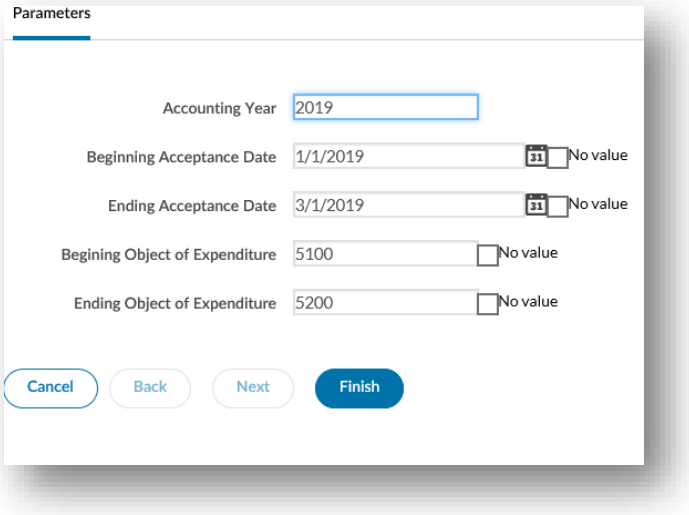
IHUB NOTES

3 DOT MENU: AUTO ARCHIVE



- Similar to Auto Archive on "Action" top menu but simpler and you can expire dependent files at the same time.

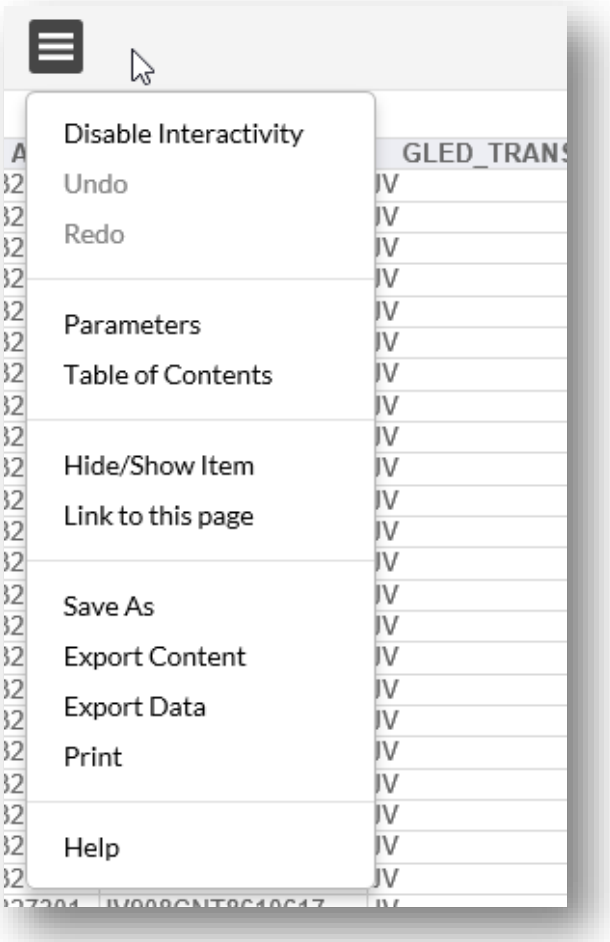
PARAMETERS



- Can use default dates/ranges, type in your own, or use "**No Value**" (to see all possible data - must select "**No Value**" on both beginning and end range).
- Bottom of report shows conditions that were built into report

IHUB NOTES

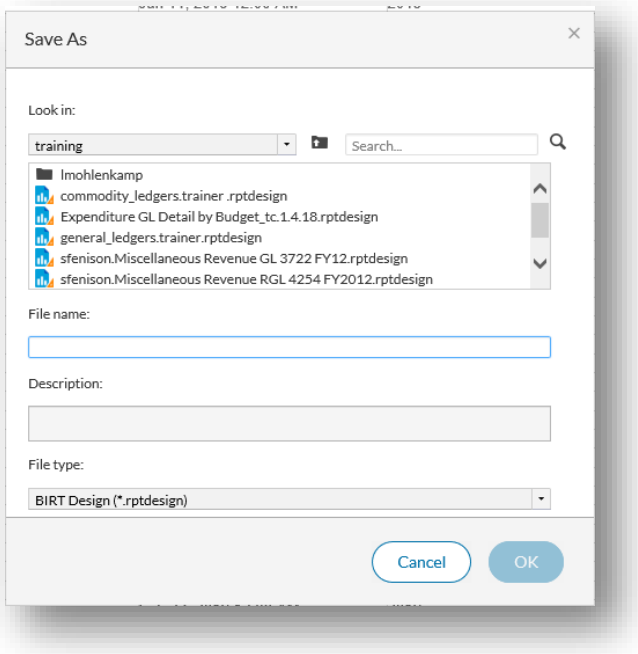
PANCAKE/HAMBURGER MENU



- **Disable Interactivity:** makes it so you can't sort or filter (makes flat file)
- **Parameters:** brings up parameters so you can change "on the fly"
- **Table to Contents:** can put "hooks" in long report – for superusers
- **Hide/Show Items:** can hide or show column headers and data (don't use this - better way to do it on column menu)
- **Link to this page:** can email or IM someone with link that takes them directly to this file where they land on parameter page to run report.
- **Print:** print to HTML or PDF. Select all pages or page range; actual or scale.
- **Help:** takes you to online general help library

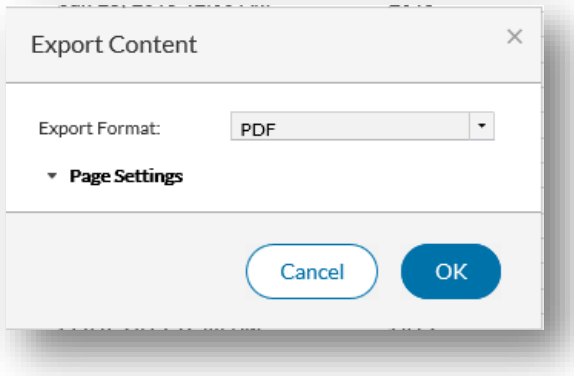
IHUB NOTES

PANCAKE/HAMBURGER MENU: SAVE AS



- With **Save As,** you can select what type of file it is: Design or Document

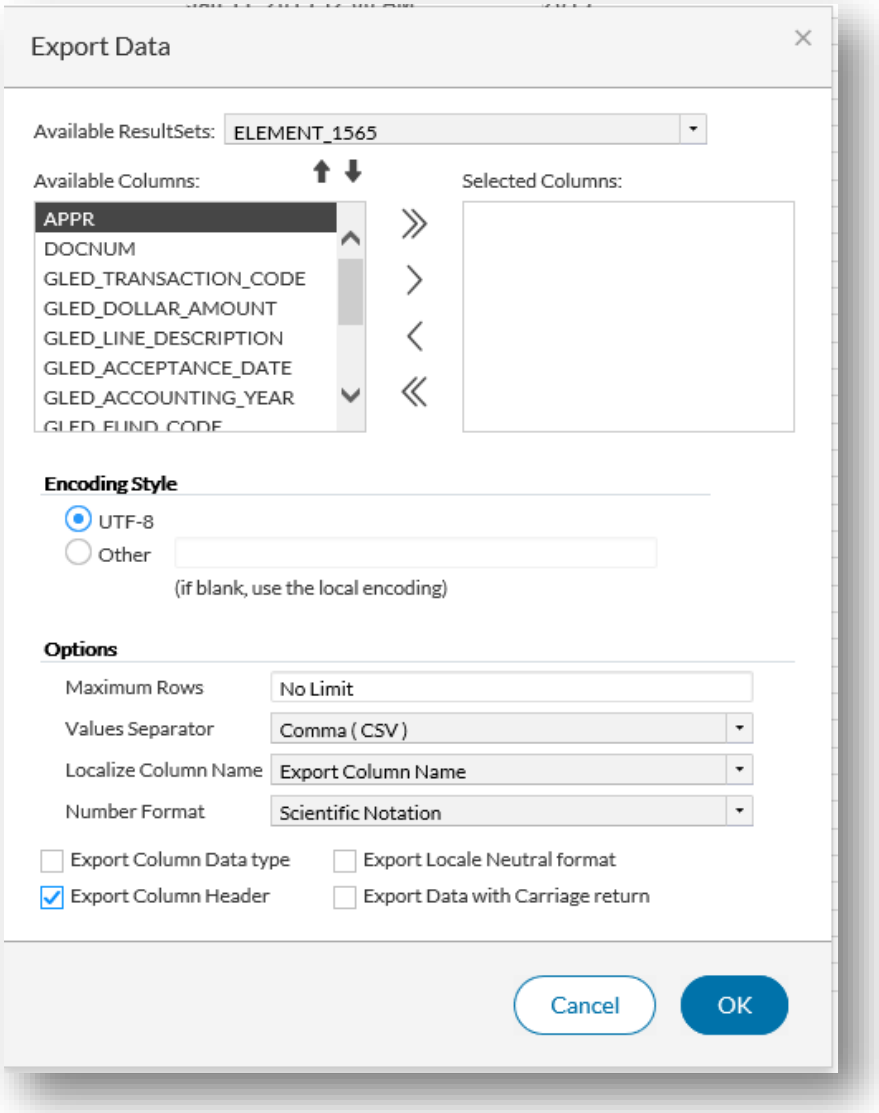
PANCAKE/HAMBURGER MENU: EXPORT CONTENT



- This is the option you use to export the full report to Excel, PDF, Word, PowerPoint, etc. Exporting to Excel includes aggregation formulas.

IHUB NOTES

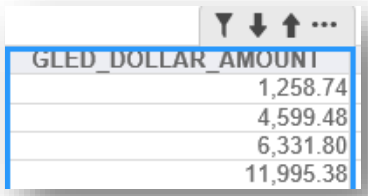
PANCAKE/HAMBURGER MENU: EXPORT DATA



- Allows you to export by columns (double arrow for all, single arrow for individual selected ones).
- Choice of CSV, PSV, TSV and SSV files to download to
- If exporting to use in Excel, it does not include formulas for aggregation

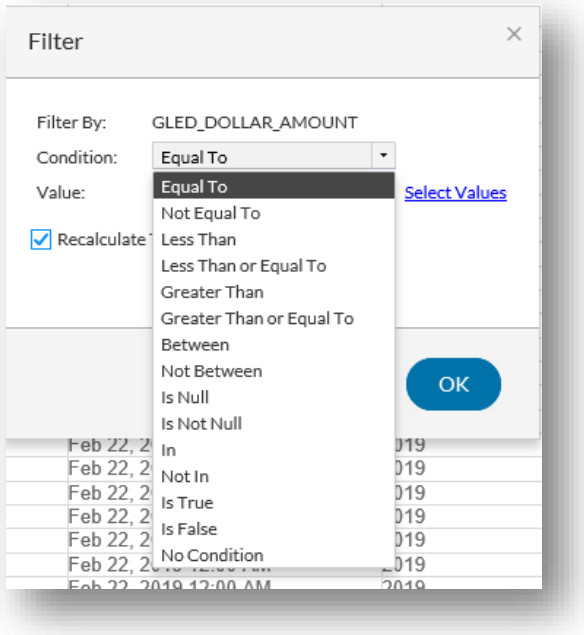
IHUB NOTES

COLUMN MENU



- Clicking on the column header will display the **Column menu** where you can sort and filter data, and hide or move columns.
- Down arrow & up arrow shortcut icons sort data high-to-low or low-to-high
- Filter shortcut icon takes you to filter options for that column data

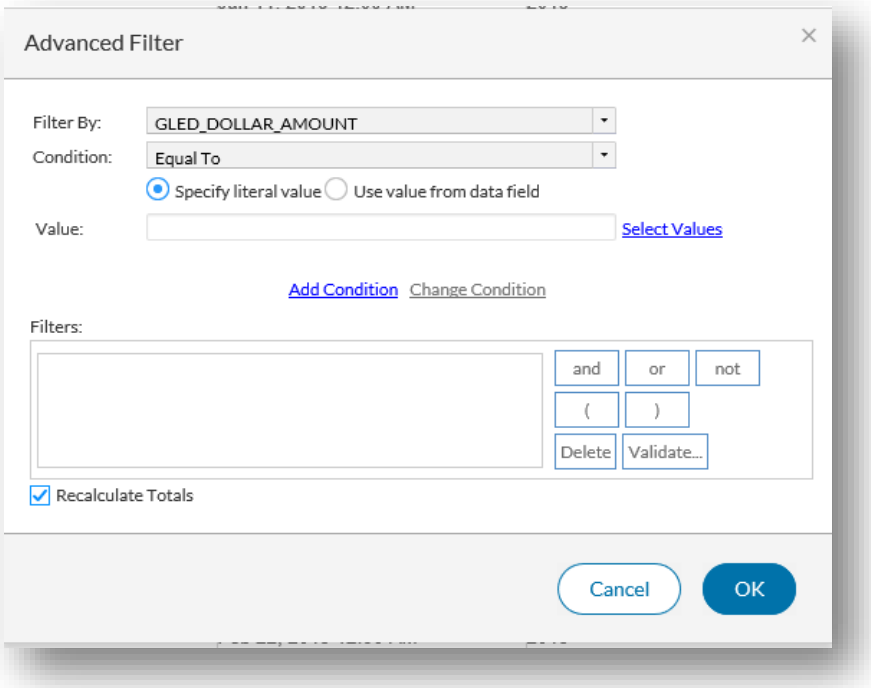
COLUMN MENU: FILTER ICON



- Value: can type in a value or select a value from data in that column
- Recalculate Totals: if you don't care about totals and have a long report, deselecting this can speed things up.

IHUB NOTES

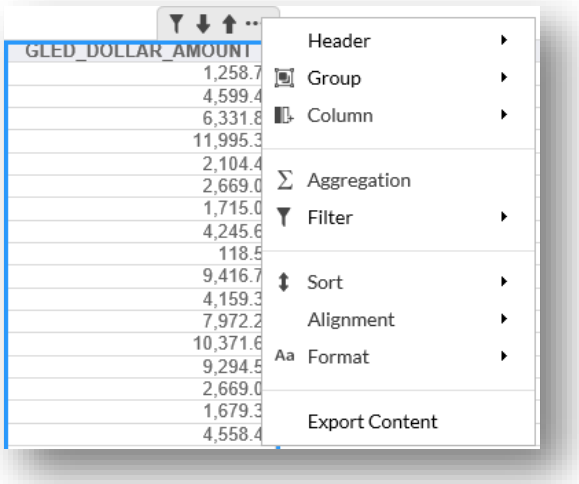
COLUMN MENU: FILTER ICON: ADVANCED FILTER



- If a filter is applied there is a checkmark next to the filter icon
- Can click on any column to see filters and remove them if needed
- **Clear filter** blue link removes filter
- **Advanced Filter** can add more conditions than just one using **and**, **or**, **not**
- **Add Condition** is selected to add second, third etc. conditions
- **Change Condition** is selected after highlighting existing condition, and changing the value (up top). This will update the condition to the new value
- Highlighting condition and selecting **Delete** removes the condition**.**

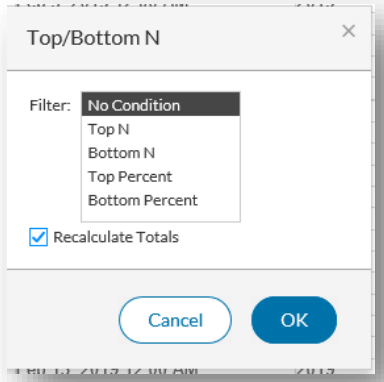
IHUB NOTES

COLUMN 3 DOT MENU



- **Export Content:** takes you to same export dialog box in pancake menu. If formatting has been applied on report it will export that too**.**

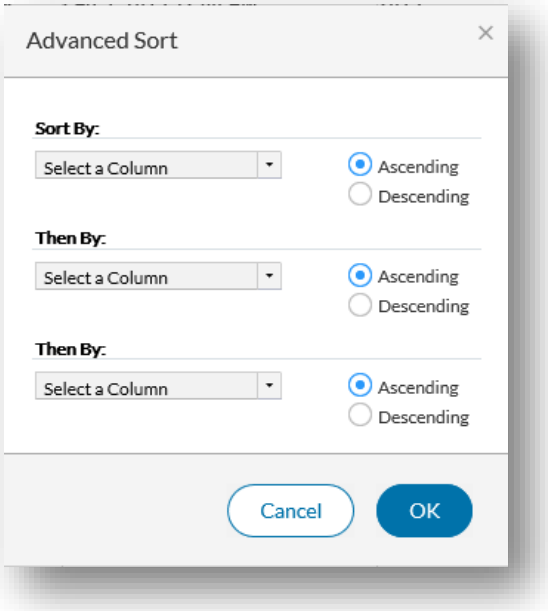
COLUMN 3 DOT MENU: FILTER: TOP/BOTTOM N



- **Filter** option is same as shortcut but also has "**Top/Bottom N**" (filter that gives top or bottom percent or amounts)

IHUB NOTES

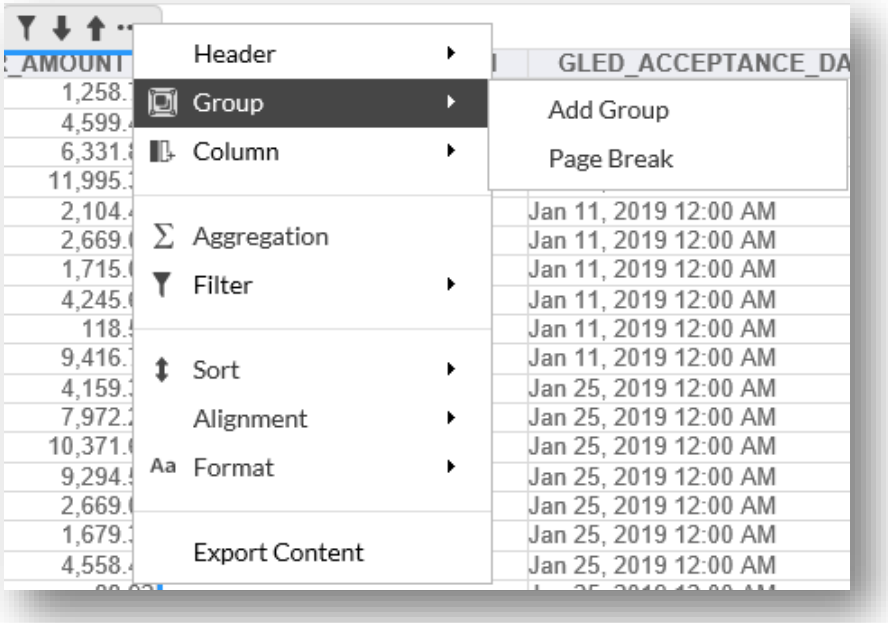
COLUMN 3 DOT MENU: SORT: ADVANCED SORT



- **Sort** (**Ascending** & **Descending**) is same as shortcut icons
- **Advanced Sort** can sort by up to 3 multiple columns ascending or descending
- Can click on any column's **"Advance Sort"** option to see assigned sorting and to remove them if needed.

IHUB NOTES

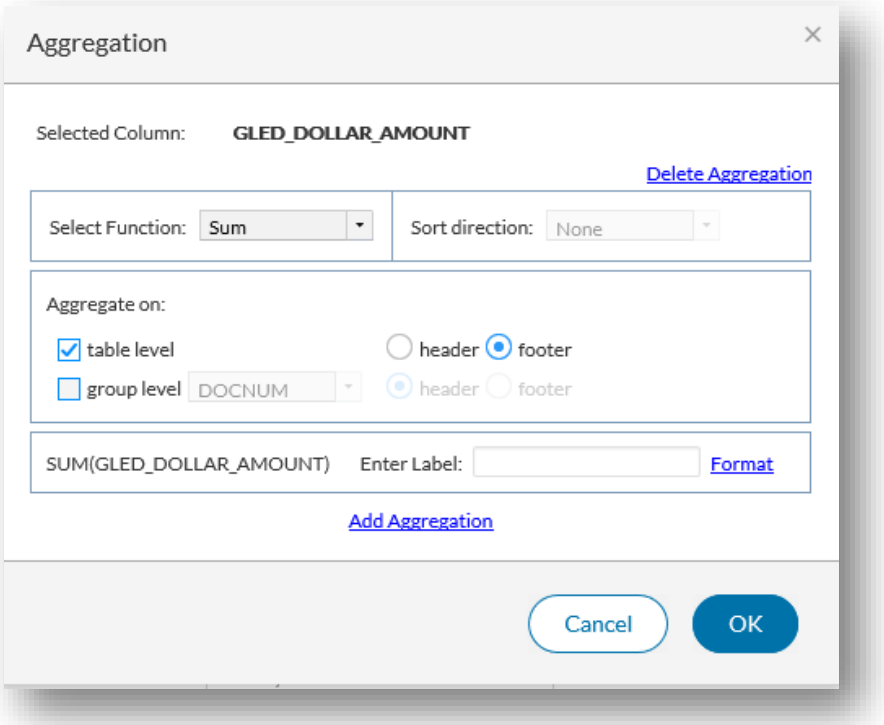
COLUMN 3 DOT MENU: GROUP



- Add Group: select column, select Group>Add Group and items in that column will be grouped together. Shifts selected column to the first column
- Hide/Show Detail: these options appear after items have been grouped. Hide removes all items under a grouping so you only see the grouped items without detail. Show returns the detail in the grouping
- Delete Inner Group: removes grouping but keeps column as first column
- Once grouped, the data within groups can be sorted using the Sort menu option. It will sort accordingly within those groups
- Page Break: gives a page break before or after groupings in that column. Choice of always after a group, always before a group, always except the first, and always except the last. These last two options remove extra blank pages. Select “None” to remove page breaks.
- Page Break (on non-grouped columns): allows you to do a page break after a specified amount of rows (ex: page break after every 10 rows)

IHUB NOTES

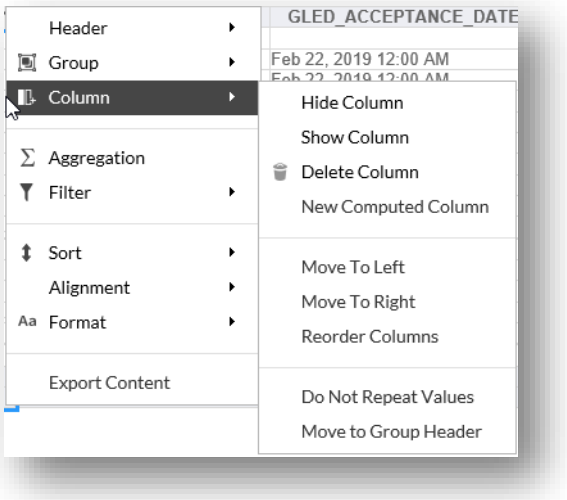
COLUMN 3 DOT MENU: AGGREGATION



- You can add aggregation in many ways including Sum, Count, Average, Median, Mode, Standard Deviation, Weighted Average, Min, Max and more
- Aggregate on: table level gives a grand total, group level gives total for your grouping
- Option to list aggregation as header or footer on table and/or group levels
- Enter Label: allows you to assign custom label for your aggregation
- Format: customize your font, font size, font color and background color for aggregation label.
- Add Aggregation: allows you to add another aggregation to a column that already has one. If you add an aggregation to a column that has a built-in one, it will replace the built-in aggregation
- Delete Aggregation: removes the aggregation

IHUB NOTES

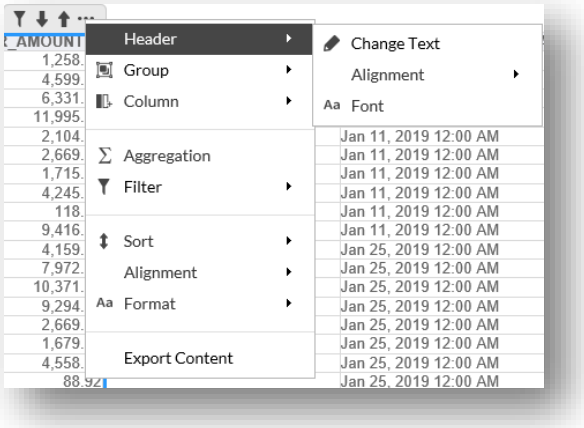
COLUMN 3 DOT MENU: COLUMN



- Can hide or show columns. To show, just click any column and select **Show Column** and it will appear in a list of any hidden columns where you can select it to show.
- **New Computed Column** places new column beside the one you've selected to compute data in your selected column based on chosen criteria (such as creating a running total, % of difference, between X and Y numbers etc.)
- **Reorder Columns**: allows you to place your column exactly where you want in the worksheet using an up/down arrow to place it.
- **Do Not Repeat Values**: removes repeating values so you can see the value change easier.

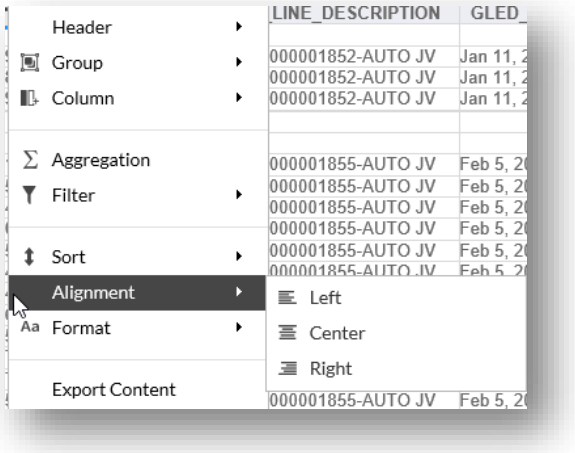
IHUB NOTES

COLUMN 3 DOT MENU: HEADER



- Option of change text (change column titles), alignment (right, left or center for just the column title), and font (font, size, color and background for just column title)

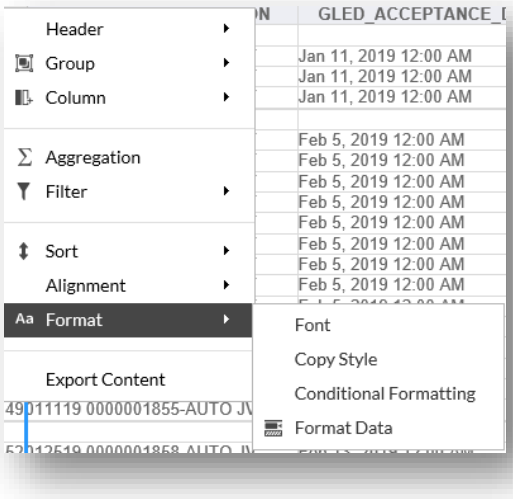
COLUMN 3 DOT MENU: ALIGNMENT



- Aligns both data and header: right, center, left

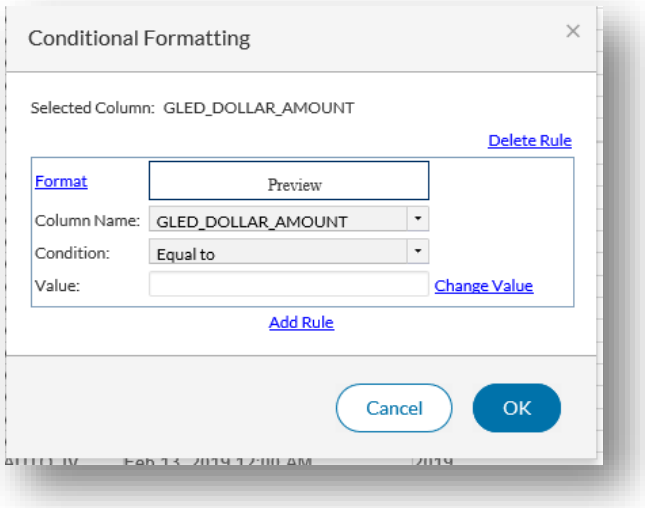
IHUB NOTES

COLUMN 3 DOT MENU: FORMAT



- Formats column or table data's font (font, size, color and background color),
- Copy Style: takes current column's formatting (both column title and data) and applies it to specific columns you select

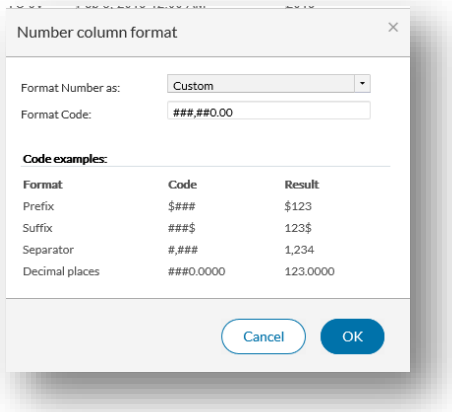
COLUMN 3 DOT MENU: FORMAT: CONDITIONAL FORMATTING



- Can highlight a specific number with background or font change

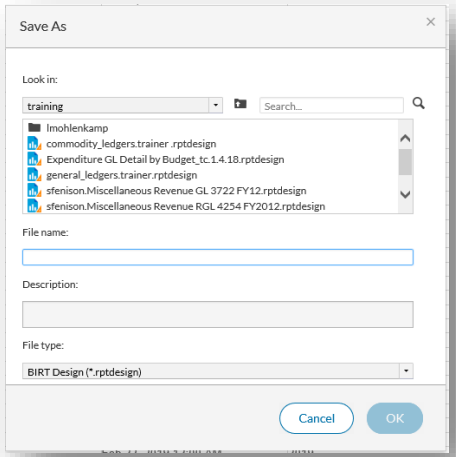
IHUB NOTES

COLUMN 3 DOT MENU: FORMAT: FORMAT DATA



- **Format Data** intuitively knows what type of format is possibly needed (ex. Number with decimal is likely currency, date may require date formatting)
- Here you can format currency with decimals, cents and dollar signs; dates with specific date/time structure, text with all upper or lowercase, etc.
- Copy Format: This shows with some columns and allows you to copy the formatting such as date, currency etc. and apply it to another column.

PANCAKE MENU: SAVE AS



IHUB NOTES