

# The Anatomy of the Dashboard

By now, you know that Compass Analytics offers you insight into any area of your business that you want to investigate using data generated by your Eagle system. In previous Compass modules, you learned how to navigate the screen, build queries and snapshots, and create custom Lookups. Today, we will take a closer look at each of the analytic view options—Queries, Pages, and Layouts—and discuss when each particular option should be used.

Let's open Compass and get started.

## Topics

- Query
- Page
- Layout

## Query

All Compass applications include Pages. When Compass is first opened, a single blank page is usually visible.

You learned in a previous module how to build a basic Query. Let's use that same information to run a simple analytic of Sales and Gross Margin by Department with a filter of This Year. This is important information that you want to check periodically, so let's save it.

As you can see, you have the option to save this view as a Page or Query. How you save the report depends on two things: "How much information do you want to save?" and "How do you want to access the data?" Your choices in accessing the data are through Compass or as exported reports through email.

If you are working with a single query, especially one that you may use repeatedly, you'll want to save the report as a Query.

A Query, which can be compared to an Excel worksheet, is the most frequently saved analytic view. The Query screen information is a single data set. In other words, all the data is viewed in a single work area. The benefit in saving a report as a Query is the ability to have Compass automatically run the analytics on a set schedule and export the resulting data through email. There are several options for exporting the data from a query, including Excel, Original PDF or a CSV File, just to mention a few. Although we will not be covering how to setup or schedule emailing Queries in this module, it is important for you to know that these options are available when you are deciding how to save a report.

## Page

A Page is a larger collection of information than a query. In fact, you can create multiple queries on any particular Page. This can be beneficial if you want to create a Company Dashboard of information to view.

To add additional queries into the current Page you'll need new work areas. Simply click on Page, then select where you want the work area to be placed. Let's place our New Work Area to the Right and Insert Analytics. Notice that the full Compass menu is available to run this new, completely different, analytic.

In our first work area, we ran Sales and Gross Margin by Department. Because we did not include Store in the first query, the results show all stores combined. To break this down, let's view the second work area with the same

Measures—Sales and Gross Margin. Instead of choosing ‘by Department’ as our Dimension, we’ll choose ‘by Store.’ We’ll also filter on This Year so we’re looking at current data.

You can build the new Query from scratch, but let me show you a quick trick for duplicating a Query. Simply click in the work area of the Query that you want to copy and drag into the work area in which you want the new Query to appear. This creates an exact copy of the original Query, as you can see when you look at the Measures and Dimensions.

Once the first query is duplicated, simply remove Measures and Dimensions you do not want and add those you do. In our example, we will remove Department and add Store. Let’s also change the view to Chart View. Finally, place both work areas in Dashboard View so you can have a quick dashboard of Company Sales for This Year by Department and by Store.

Now we come to the question of how to save this report again. Since we have two work areas this time, it’s important to save it as a Page. When saving a Page, all work areas or individual Queries on the Page are saved. There is no limit to the number of work areas that can be added to a single Page other than your ability to view everything on the Page. If we tried to save this Page as a Query, we would only be saving the single Query contained in the Save area and not the entire Page.

There is another major difference between a page and a query: A Page can only be emailed as a PDF (otherwise known as a Screenshot). You can’t export the data to Excel or as a CSV file as you can with a single query. So, only what you see on the screen can be emailed.

## Layout

You’ve seen how multiple queries can be combined to create a Page. Let’s expand our report once again and look at Layouts.

A Layout can be compared to an Excel Workbook with several Pages. Most Layouts are viewed in Compass because email options for a Layout are the same as a Page; a PDF or Screenshot only. This would not allow all pages to be emailed.

To create a Layout, simply add another Page to your worksheet by clicking Page and choosing Add New Default Page. You will now see a Page 2 tab. Notice that the analytics on page 2 were automatically inserted. [Carl, after looking at this again, should it say “the analytics on page 2 were automatically copied from page 1 and inserted?"] This is because we choose Add a New Default Page. If you don’t want analytics automatically included, select Add a New Blank Page instead.

Remember that we built two Queries both with Current Year Sales on Page 1. One Query was Sales and Gross Margin by Department in Table View and the other Query was Sales and Gross Margin by Store in Chart View.

On Page 2, we’ll use the same idea, only instead of Sales we will view Current Inventory with the same Dimensions. So from the Inventory Data Cube let’s show Inventory at Average Cost by Department and Refresh. We can now see our Current Inventory Value by Department for all Stores combined in this work area.

Just as we did on Page 1, let’s add another work area to the right by clicking Page, New Work Area and Right. Again, let’s copy the Measures and Dimensions from the first Query over to the New Work Area.

Remove Department, add Store, change to Chart View and press Refresh. Now you have Current Inventory by Department with all stores combined in Table View on the left, and Current Inventory by Store in Chart View on the right.

Let's place both Queries in Dashboard View to have a clean Dashboard of Current Inventory.

It's also helpful to rename the Page tabs so you know at a glance what information is stored on each page. To do this, just right-click on each Page Tab and choose to Rename the Page. In this case, we'll rename Page 1 as Sales and Page 2 as Inventory.

Our last step is to save these two Pages as a Layout. The Layout menu is the Compass Symbol. Click the Compass Symbol and choose Save Layout.

Remember, if you set up a layout with multiple pages but save it as a Page, you'll only be saving the Page that's open; the other Pages would be lost. Even worse, if you saved it as a Query, you would only be saving the single active Query. All the other Queries would be lost. So, if you have multiple pages, always save it as a Layout!

As you can see from the examples we've explored today, Compass offers a variety of view options for the reports you're building in Compass. You can build a single analytic and save it as a Query, or combine multiple queries on a single Page and save it as a Page. Finally, you can build queries on more than one Page and save it as a Layout.

I encourage you to watch the other Compass Training on Demand Modules to learn even more about the power of Compass.

Thank you.

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