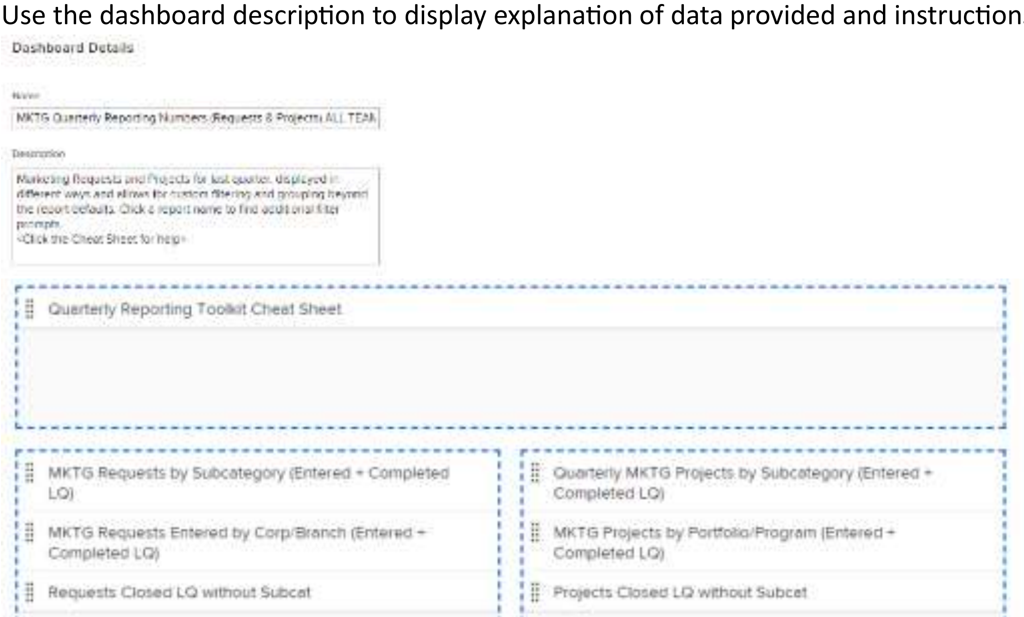
This Quarterly Reporting Toolkit consists of basic charts for requests and projects for Marketing teams along with a cheat sheet showing users how to pull data they need from the base set of reports.

Here are some tips on some ways to provide the most reporting options from one dashboard:

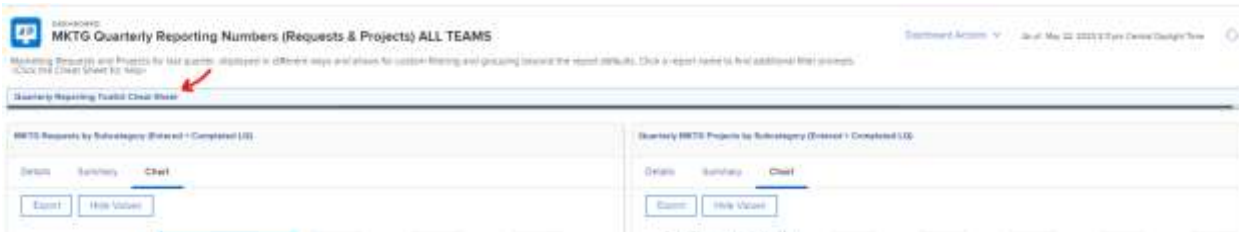
1. Since changing the custom groupings will not affect the chart views, I provided the same data grouped different ways and in different chart formats (pie, bar chart) for a quick view of the most common data groupings at a glance.

2. Entered AND completed last quarter are both included so users could choose which set of data they are interested in by using prompts

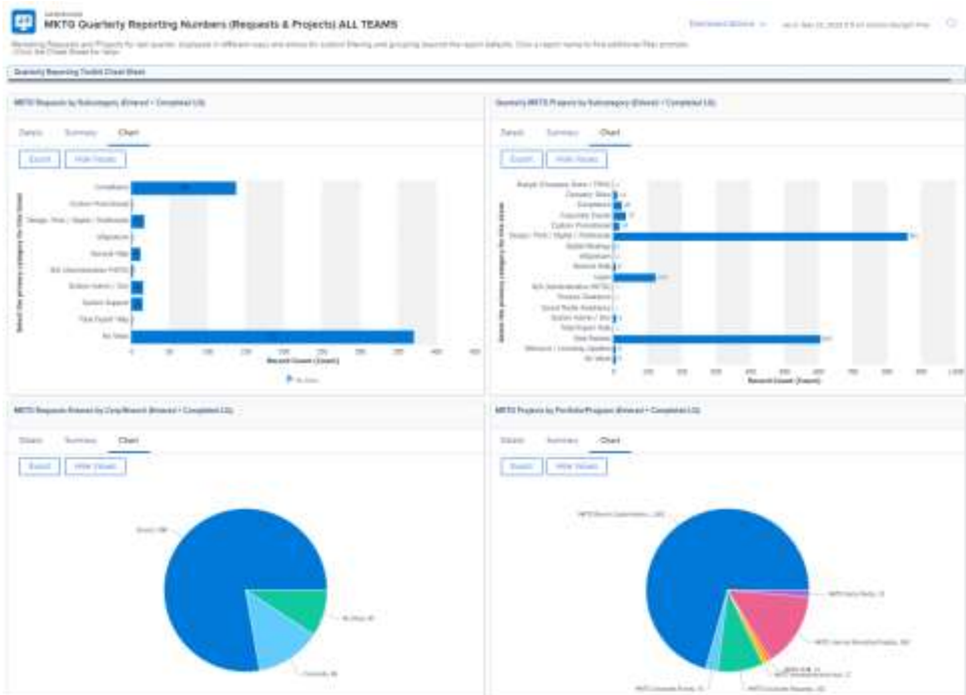
3. Use the dashboard description to display explanation of data provided and instructions for help.



4. Use an external link section to provide a quick link to the cheat sheet, which has been stored in Workfront:



<u>The base dashboard looks like this:</u>

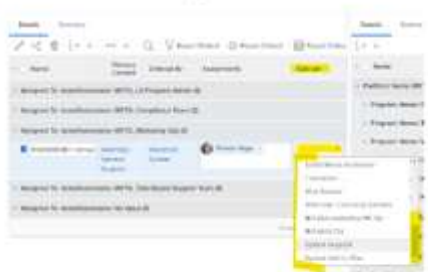


****Since some data is inaccurate due to users not filling in details, section has been provided them to correct their missing data if they want to get credit for the work. In our case, it is "subcat", which can filled in using inline editing from here.****

Does your count seem low? Feel like you are missing work?
Check the two reports at the bottom of this dashboard for items with missing sub-categories!
You must have permissions to edit the custom forms on these items to choose a sub-cat for them.

5. Closed Requests without Subcat
6. Closed Projects without Subcat

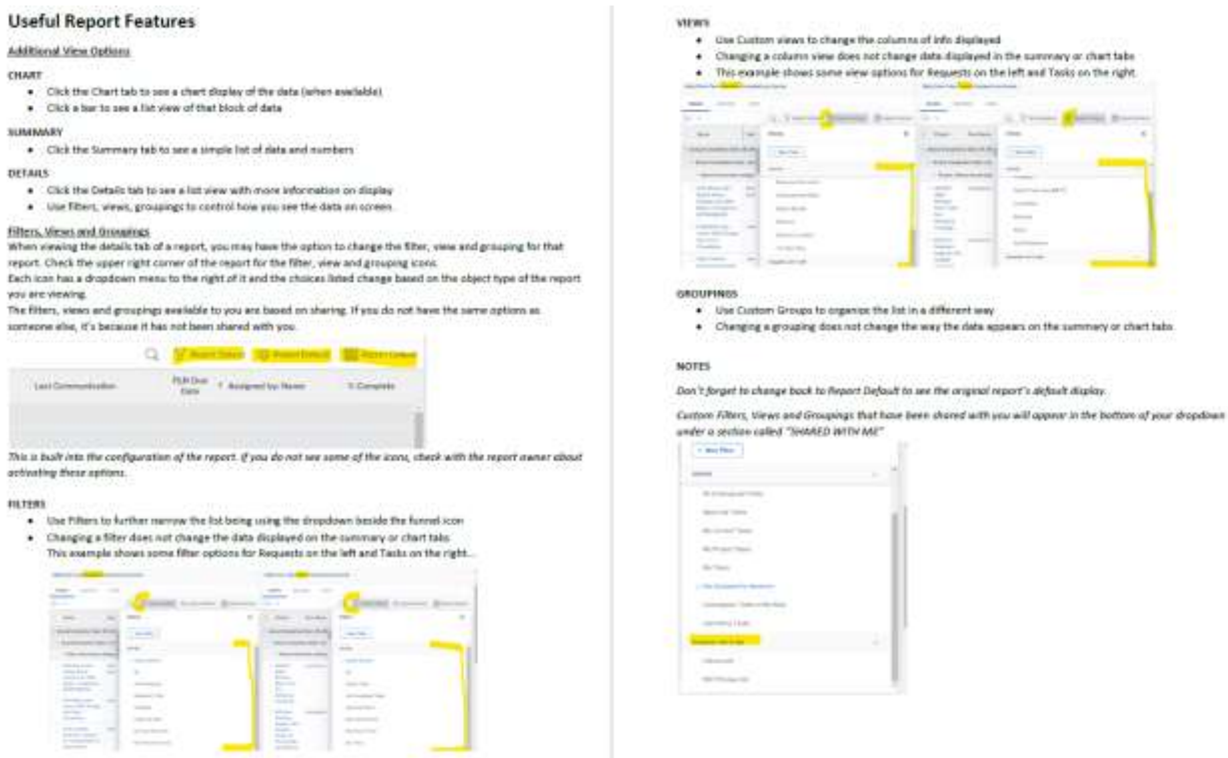
- Look for items assigned to or owned by your team and apply the appropriate sub-cat by clicking the dropdown on each line item and selecting the sub-cat.
- Click away or press Enter to apply the selection.
- Refresh the dashboard/reports for most current results.



5. Provide a section for tips related to using the "Useful Reporting Features":

- Switching between Chart, Summary and Detail tabs for different views of data
- Using custom filter, view and grouping dropdowns to change the data being displayed
- Export the data to various formats
- Click report names to access filter prompts

<u>EXAMPLE:</u>



Useful Report Features

Additional View Options

CHART

- Click the Chart tab to see a chart display of the data (when available)
- Click a bar to see a list view of that block of data

SUMMARY

- Click the Summary tab to see a simple list of data and numbers

DETAILS

- Click the Details tab to see a list view with more information on display
- Use Filters, views, groupings to control how you see the data on screen

Filters, Views and Groupings

When viewing the details tab of a report, you may have the option to change the filter, view and grouping for that report. Check the upper right corner of the report for the filter, view and grouping icons.
Each icon has a dropdown menu to the right of it and the choices listed change based on the object type of the report you are viewing.
The filters, views and groupings available to you are based on sharing. If you do not have the same options as someone else, it's because it has not been shared with you.

This is built into the configuration of the report. If you do not see some of the icons, check with the report owner about activating these options.

FILTERS

- Use Filters to further narrow the list being using the dropdown beside the funnel icon
- Changing a filter does not change the data displayed on the summary or chart tabs
  This example shows some filter options for Requests on the left and Tasks on the right.

VIEWS

- Use Custom views to change the columns of info displayed
- Changing a column view does not change data displayed in the summary or chart tabs
- This example shows some view options for Requests on the left and Tasks on the right

GROUPINGS

- Use Custom Groups to organize the list in a different way
- Changing a grouping does not change the way the data appears on the summary or chart tabs

NOTES

Don't forget to change back to Report Default to see the original report's default display.

Custom Filters, Views and Groupings that have been shared with you will appear in the bottom of your dropdown under a section called "SHARED WITH ME"