# Lab 1: Performance Tile

Performance tiles are a visualization of a single aggregation.   They can be customized in a variety of ways, including setting conditional values.

1. From the Catalog, navigate to the folder:
    /shared/2.0 - Finance/Reports/Training">/Shared Folders/2.0 - Finance/Reports/Training

2. Click the EDIT link under the "Training GF Expenditures" analysis. Then, click the SAVE AS icon in the upper right corner of the analysis and save with your initials as a prefix or suffix.

3. Click the Criteria Tab of your renamed analysis, and change the MBU to your own, or one you have department permission to see. Save your analysis

4. Click the Results tab and view your analysis. We are going to add a performance tile view at the top of this first page, between the title and the report.

5. From the Views pane, select the New View Icon, and choose Performance Tile.

6. In the Layout section, select the single aggregate measure you would like to display. For this exercise, select the "Percent of Budget Spent" measure.
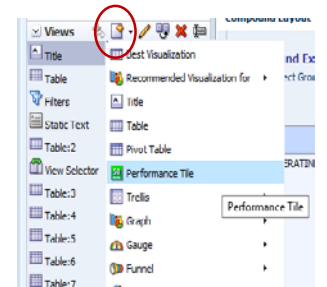
    - If you want to change the label, deselect the checkbox to use the measure's name, and enter a name you would like to use.

    - You can optionally enter a description that will display below the number

    - All of these elements can be customized to change the font size, color, etc.

7. In the Styles section, you have the option of a small/medium/large tile, as well as a format option.

8. If you would like to set conditional formatting, or customize the size of the tile beyond the 3 choices, you can do so by selecting the Performance Tile Properties button.
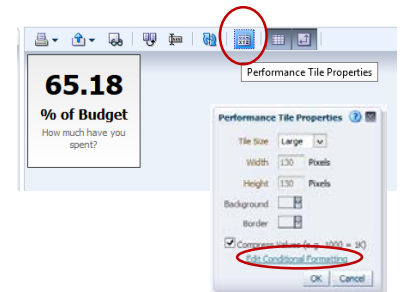
9. Click the DONE button when finished, to return to the main analysis. From the Views section, select your Performance Tile view and drag it to the area between the title and the analysis.

- Note: conditionally formatting the performance tile actually conditionally formats the column, and if you have that column displayed it will show the format as well. To prevent this, you can add the column twice in the criteria area, and name them differently to differentiate them. One can then be used for the Tile, while the other displays in the table view.
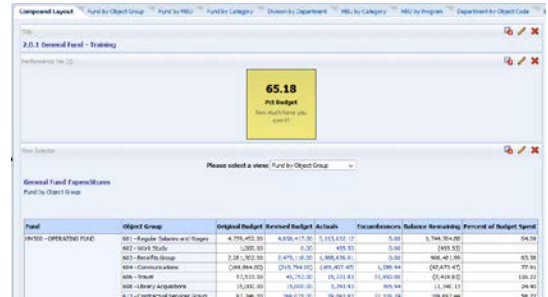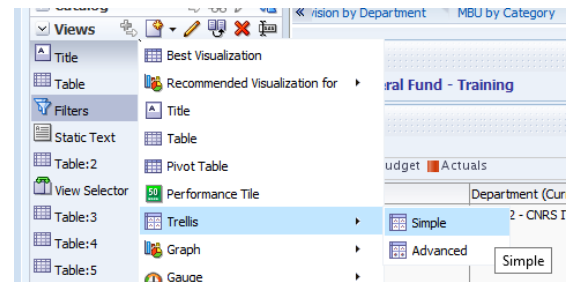
Lab 2: Simple Trellis

Trellises are a way to display high-density micro-charted data, where you can have data and graphics display in-line. There are two types:

- Simple Trellis – A simple trellis is a good way to display comparisons.
- Advanced Trellis – This view is how you can display sparklines / sparkareas which show a trend over time.

In this lab we are going to create a simple trellis, comparing Revised Budget to Actuals, and grouping by fund and department.

1. From the Views pane, select the New View Icon, and choose Trellis, Simple Trellis.
2. In the Layout view, exclude all fields EXCEPT Department.
3. In the Visualization area, remove all fields EXCEPT Revised Budget and Actuals.
4. Drag the Fund field from the Column Area to the Row area, so it displays to the left of Department
5. Expand the Accounting Period Folder, and drag Fiscal Year into the Column Area.

← Your Layout should look like this…
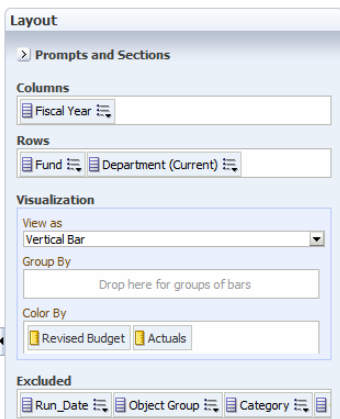
…and your trellis should look like this →
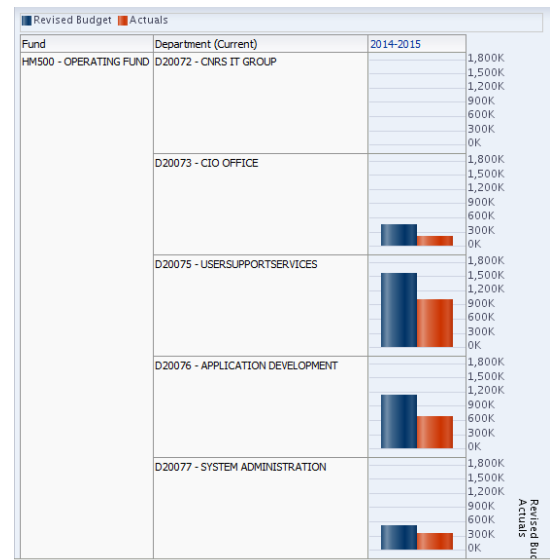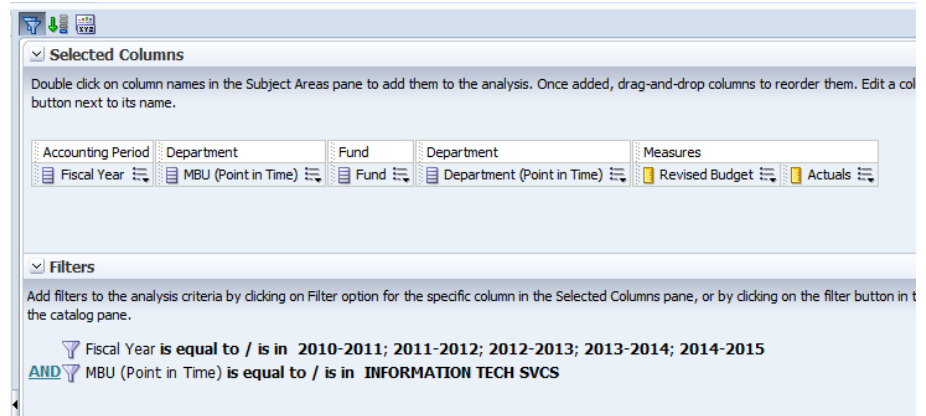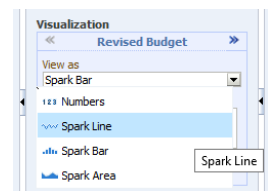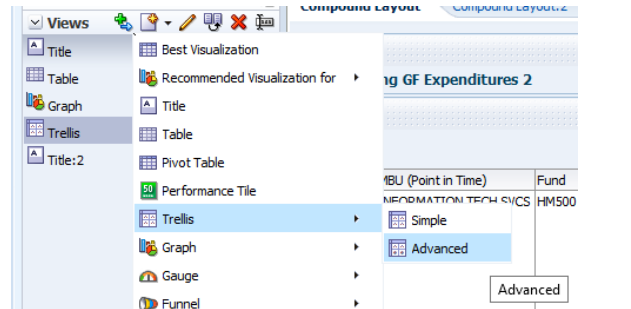
Lab 3: Advanced Trellis

Trellises are a way to display high-density micro-charted data, where you can have data and graphics display in-line. There are two types:

- Simple Trellis – A simple trellis is a good way to display comparisons.
- Advanced Trellis – This view is how you can display sparklines / sparkareas which show a trend over time.

In this lab we are going to create an advanced trellis, looking at measures over time for MBU, Fund and Department

1. Create a New Analysis from the Finance - General Ledger subject area, selecting the following columns. Set your filter to be the last 5 fiscal years, and select an MBU.

2. Edit the Column properties of the "Actuals" measure and change the label to read "Current Year Actuals"
3. From the Views pane, select the New View Icon, and choose Trellis, Advanced Trellis.
4. In the Layout Tab in the Visualization section, notice there are chevrons (>>) . These allow you to toggle from measure to measure to adjust what you want to see. For the Revised Budget, let's change the "view as" from a Spark Bar to a Spark Line.
5. Click the right chevron to scroll to the next measure. For Current Year Actuals, let's display the numbers.

Your trellis should look like this:

6. Notice that our Data Viewing property is set so our headers are fixed as we scroll down. This property also sets the width of the analysis, which we can adjust to remove the horizontal scroll bar. To remove the scroll bar, let's widen the analysis. Click on the Trellis Properties button to open the dialog box . In there, set the Maximum width to a size that accommodates your window and possibly removes the horizontal scroll bar depending on how many columns you have.

7. Remove the table from your compound layout and add the trellis. Save your work.