

HOW TO CREATE AN AD HOC VIEW (TABLE)

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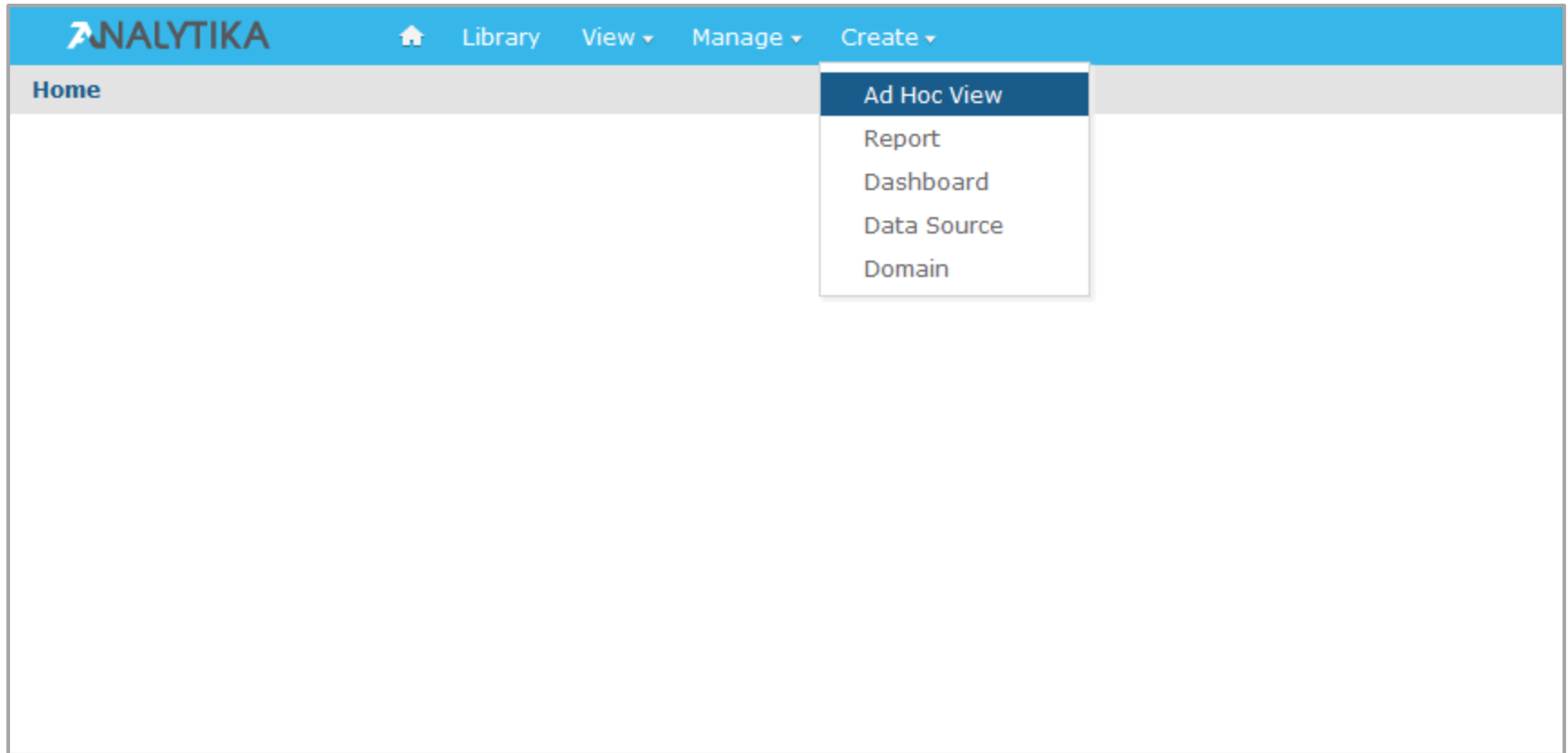


WHAT IS AN AD HOC VIEW

Lambda Analytika **Ad Hoc Views** provides the ability to create charts, lists (or tables), and crosstabs for your presentation and analysis of the data that resides in your Totara LMS. You can choose to present your analysis results in either tabular format or with one of the 30+ options for charts. Upon selection of a presentation style or analysis option you decide what information is in your charts, which fields are visible in your table, in what order and how the information is sorted and filtered. **Ad Hoc Views** are easy to export, can be saved for future use or used in dashboards.

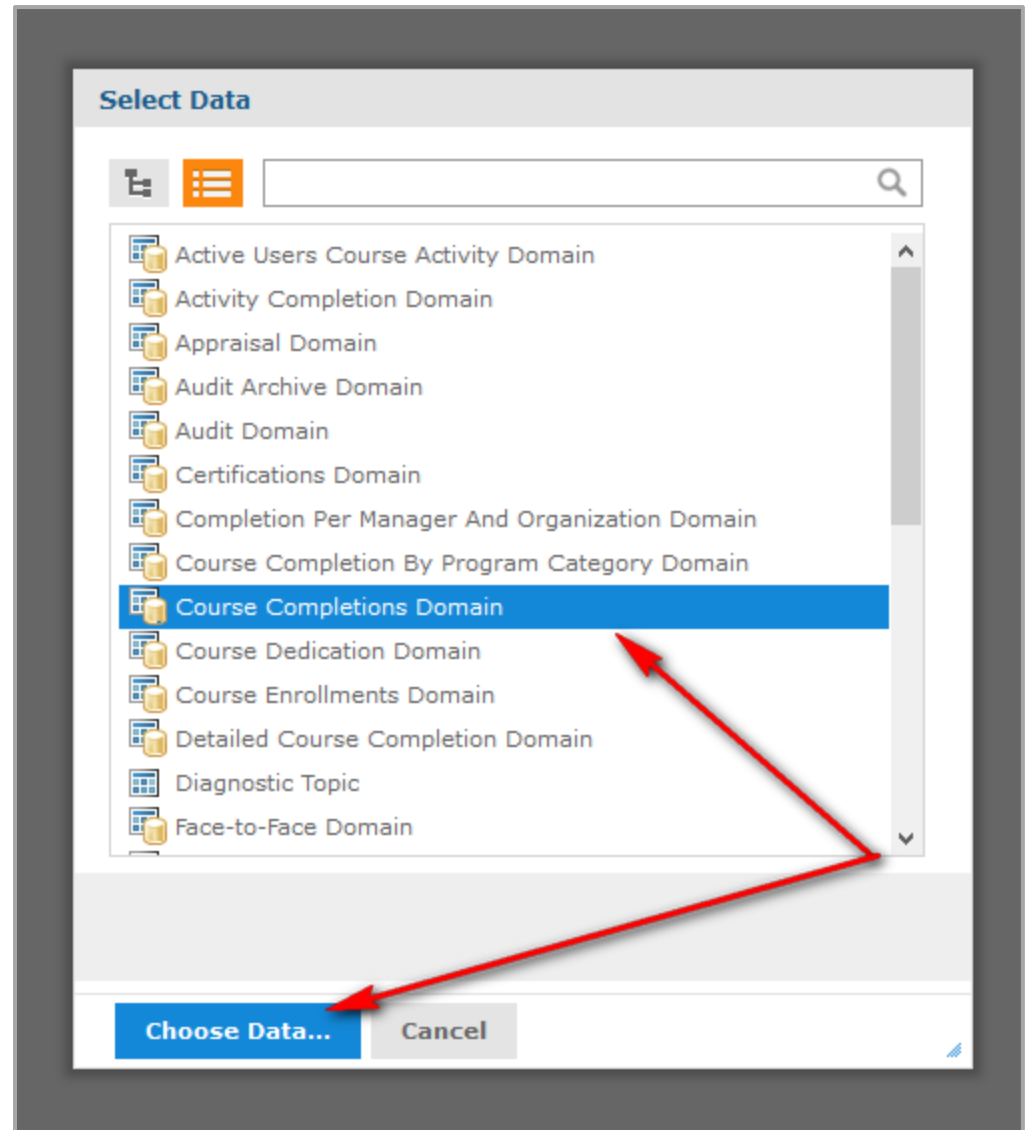
HOW TO CREATE AN AD HOC VIEW TABLE

1. From the Home screen, click on **Create** and select **Ad Hoc View**.



2. In the **Select Data** wizard select the **Course Completions Domain**.

Click **Choose Data...**

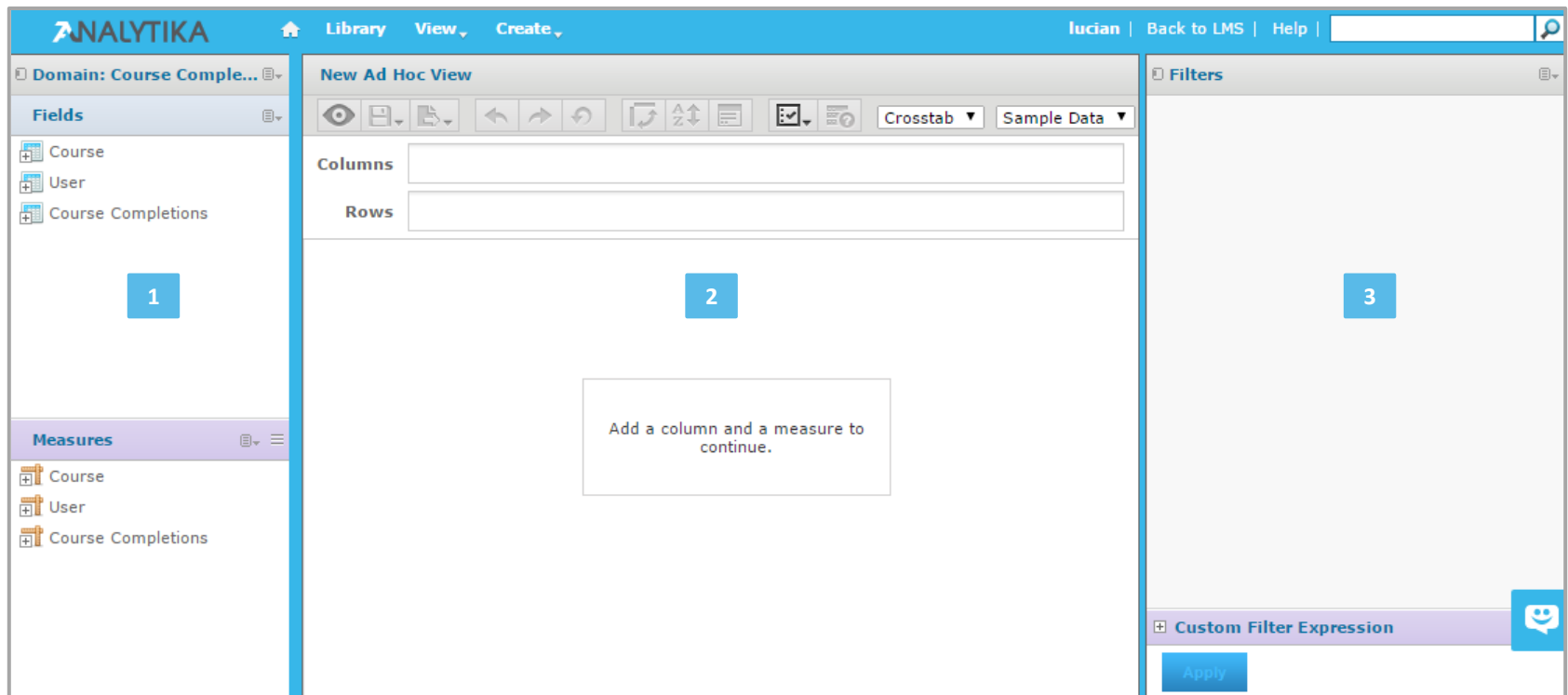


3. Move all items in the **Source** panel using the double arrows or drag and drop all items into the **Selected Fields** panel.

Click **OK** to launch the **Ad Hoc View Editor**.

The screenshot displays the ANALTIKA Data Chooser interface. At the top, there is a navigation bar with the ANALTIKA logo, a home icon, and menu items: Library, View, Manage, and Create. On the right side of the navigation bar, the user is identified as 'lambdaadmin' with links for 'Back to LMS' and 'Help'. Below the navigation bar is a header for 'Data Chooser'. The main content area is titled 'Choose Data' and includes a sub-header 'Choose Data' and a descriptive text: 'To move items in or out of selected fields, double-click them, drag them, or use the direction buttons.' On the left side, there is a vertical menu with options: Fields, Pre-filters, Display, and Save as Topic. The central area is divided into two panels: 'Source' and 'Selected Fields'. The 'Source' panel contains three items: 'Course', 'User', and 'Course Completions', each with a right-pointing arrow icon. A red box highlights these three items, and a red arrow points from the 'User' item towards the 'Selected Fields' panel. The 'Selected Fields' panel is currently empty. Between the two panels are four direction buttons: a single right arrow, a double right arrow, a double left arrow, and a single left arrow. At the bottom left of the interface, there are two buttons: 'OK' and 'Cancel'.

4. There are three panels in the Ad Hoc View Editor: **Domain Selection Panel**, **Ad Hoc View Panel**, and **Filters**.



5. Using the Ad Hoc View Editor, let's create a **Table** view. Select **Table** as the View Type in the View drop down.

Drag and drop the **Course Full Name and ID** and **Course Category** from the Course field into the Ad Hoc View Panel to create the first two columns in your table.

The screenshot shows the 'New Ad Hoc View' editor. On the left, a 'Fields' list includes 'Course' (with sub-fields: Short Name, Course, Sort Order, Course Full Name and ID, Short and Full Name, Course Start Date, Course Category, Course Category, Sort Order, Course Category Nam...) and 'User' (with sub-field: Course Completions). The 'Course Full Name and ID' and 'Course Category' fields are highlighted. The main panel shows a toolbar with a 'Table' dropdown menu open, displaying options: Table, Chart, and Crosstab. Below the toolbar, the 'Columns' section contains 'Course Full Name and ID' and 'Course Category'. The 'Groups' section is empty. The main view area displays a table with the following data:

Course Full Name and ID	Course Category
Company Orientation 6	Corporate
Contractor Training 53	Partner Courses
Exchange Samples 40	Miscellaneous
How to design and facilitate an online course 46	Miscellaneous
Learn with Moodle 38	Miscellaneous

- Repeat step 5 and create four more columns from the User field: **First Name**, **Last Name**, **Date Started**, and **Date Completed**.

You may now view all of the Courses and their Categories, the Users who completed them, as well as the dates when these users began and completed these courses.

Fields

- Course
- User
 - First Name
 - Last Name
 - Name
 - City
 - Country
 - Deleted
 - Confirmed
 - Suspended
 - User Name and ID
 - Position Assignment
- Course Completions
 - Date Enrolled
 - Date Started
 - Date Completed
 - Status

Columns

- Course Full Name and ID
- Course Category
- First Name
- Last Name
- Date Started
- Date Completed

Groups

Click to add a title

Course Full Name and ID	Course Category	First Name	Last Name	Date Started	Date Completed
Company Orientation 6	Corporate	Lucian	Dinu	Mar 9, 2015	May 20, 2015
Company Orientation 6	Corporate	Julia	Roberts	Nov 10, 2014	Jan 21, 2015
Company Orientation 6	Corporate	Casey	James	May 20, 2015	Feb 23, 2015
Company Orientation 6	Corporate	Carey	Lamb	Nov 10, 2014	Feb 11, 2015
Company Orientation 6	Corporate	Chris	Chelios		
Company Orientation 6	Corporate	Hanna	Smith	May 4, 2015	May 4, 2015
Company Orientation 6	Corporate	Rachel	Nichols		
Company Orientation 6	Corporate	Kaitlin	Jacobs		

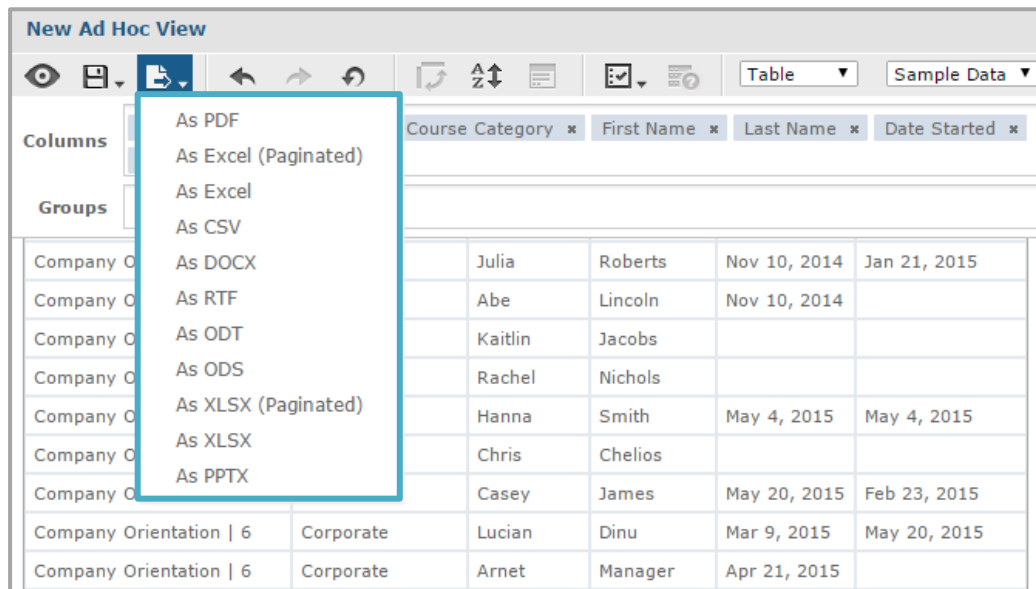
7. Let's change the name of the Course Full Name and ID column to further customize your table. Right click the column name and select **Edit Label**. Edit the column name and click **Submit**.

At this stage you may also change the Title of your Table. Simply click on the current Title and modify the text.

The screenshot displays the 'New Ad Hoc View' interface. On the left, a 'Fields' pane lists various data fields, with 'Date Started' and 'Date Completed' highlighted. The main area shows a table with the following columns: 'Course Full Name and ID', 'Course Category', 'First Name', 'Last Name', 'Date Started', and 'Date Completed'. A context menu is open over the 'Course Full Name and ID' column, with 'Edit Label' selected. An 'Edit Label' dialog box is open, showing the current label 'Course Full Name and ID' in a text field. A callout box points to the table title area with the text 'Click to add a title'.

Course Full Name and ID	Course Category	First Name	Last Name	Date Started	Date Completed
Company Orientation		Lucian	Dinu	Mar 9, 2015	May 20, 2015
Company Orientation		Julia	Roberts	Nov 10, 2014	Jan 21, 2015
Company Orientation		Casey	James	May 20, 2015	Feb 23, 2015
Company Orientation		Carey	Lamb		
Company Orientation		Chris	Helios		
Company Orientation		Lanna	Smith		
Company Orientation		Rachel	Nichols		
Company Orientation 6	Corporate	Kaitlin	Jacobs		

8. You may now export your table to PDF, Excel, Word, and PowerPoint. Click on the **Export** button and make your selection.



The screenshot shows a software interface titled "New Ad Hoc View". At the top, there is a toolbar with various icons, including a document icon with a downward arrow, which is highlighted. A dropdown menu is open from this icon, listing the following export options: "As PDF", "As Excel (Paginated)", "As Excel", "As CSV", "As DOCX", "As RTF", "As ODT", "As ODS", "As XLSX (Paginated)", "As XLSX", and "As PPTX". Below the menu, a table is visible with columns: "Course Category", "First Name", "Last Name", and "Date Started". The table contains several rows of data, including names like Julia Roberts, Abe Lincoln, Kaitlin Jacobs, Rachel Nichols, Hanna Smith, Chris Chelios, Casey James, Lucian Dinu, and Arnet Manager.

9. We can now add filters to our tables.

Right click on the **User ID** field and select **Create Filter**.

The screenshot shows the ANALYTIKA interface with a table titled "Course Completions". The table has columns for Course Full Name and ID, Course Category, User ID, First Name, Last Name, Date Started, and Date Completed. A context menu is open over the User ID column, with "Create Filter" highlighted. The left sidebar shows a list of fields and measures, including Course Category, User, and Course Completions.

Course Full Name and ID	Course Category	User ID	First Name	Last Name	Date Started	Date Completed
Company Orientation 6	Corporate	Carey Lamb	Carey	Lamb	10-Nov-2014	11-Feb-2015
Company Orientation 6	Corporate	Julia Roberts	Julia	Roberts	10-Nov-2014	21-Jan-2015
Company Orientation 6	Corporate	Abe Lincoln	Abe	Lincoln	10-Nov-2014	
Company Orientation 6	Corporate	Kaitlin Jacob	Kaitlin	Jacobs		
Company Orientation 6	Corporate	Rachel Nich	Rachel	Nichols		
Company Orientation 6	Corporate	Hanna Smith	Hanna	Smith	04-May-2015	04-May-2015
Company Orientation 6	Corporate	Chris Chelio	Chris	Chelios		
Company Orientation 6	Corporate	Casey Jame	Casey	James	20-May-2015	23-Feb-2015
Company Orientation 6	Corporate	Lucian Dinu 2427	Lucian	Dinu	09-Mar-2015	20-May-2015
Company Orientation 6	Corporate	Arnet Manager 2416	Arnet	Manager	21-Apr-2015	
Our Company Culture 25	Corporate	Carey Lamb 2253	Carey	Lamb	12-Nov-2014	12-Nov-2014
Our Company Culture 25	Corporate	Casey James 2410	Casey	James	23-Feb-2015	23-Feb-2015
Our Company Culture 25	Corporate	lambda admin 2	lambda	admin	04-May-2015	04-May-2015
Our Company Culture 25	Corporate	Jeremy H 2444	Jeremy	H	25-May-2015	25-May-2015
Public Speaking 28	Corporate	Casey James 2410	Casey	James	08-Jul-2014	24-Jul-2014

10. Let's apply a filter that will allow us to only display certain users in our table.

In the Filter panel, click on the drop down next to the filter title and select "is one of".

The screenshot shows a 'New Ad Hoc View' interface. The main table, titled 'Course Completions', has columns for 'Course Full Name and ID', 'Course Category', 'User ID', 'First Name', and 'Last Name'. The table contains 20 rows of data. To the right, the 'Filters' panel is open, showing a filter for 'A.User Name and ID' with the operator 'equals'. A dropdown menu is open, showing the option 'is one of' selected. Below the dropdown, a list of user IDs is displayed, with 'Abe Lincoln | 1805', 'Adil Pickle | 858', 'admin client | 3', 'Arnet Manager | 2416', 'Arnet Tkachuk | 2414', 'Bentley Coachs | 2436', 'Bernadette Peters | 2255', 'Cal Ripkin | 2424', 'Calvin Pitcaim | 2438', and 'Camron Neily | 2435' selected. The list also shows 'Available: 34' and 'Selected: 4' counts.

Course Full Name and ID	Course Category	User ID	First Name	Last Name
Company Orientation 6	Corporate	Carey Lamb 2253	Carey	Lamb
Company Orientation 6	Corporate	Julia Roberts 2428	Julia	Roberts
Company Orientation 6	Corporate	Abe Lincoln 1805	Abe	Lincoln
Company Orientation 6	Corporate	Kaitlin Jacobs 2422	Kaitlin	Jacobs
Company Orientation 6	Corporate	Rachel Nichols 2431	Rachel	Nichols
Company Orientation 6	Corporate	Hanna Smith 575	Hanna	Smith
Company Orientation 6	Corporate	Chris Chelios 2426	Chris	Chelios
Company Orientation 6	Corporate	Casey James 2410	Casey	James
Company Orientation 6	Corporate	Lucian Dinu 2427	Lucian	Dinu
Company Orientation 6	Corporate	Arnet Manager 2416	Arnet	Manager
Our Company Culture 25	Corporate	Carey Lamb 2253	Carey	Lamb
Our Company Culture 25	Corporate	Casey James 2410	Casey	James
Our Company Culture 25	Corporate	lambda admin 2	lambda	admin
Our Company Culture 25	Corporate	Jeremy H 2444	Jeremy	H
Public Speaking 28	Corporate	Casey James 2410	Casey	James

11. Click on the user id to select it and click on **Apply**.

Your table will now only display information for the selected user ids.

12. Click the **Save** button

Save your new **Ad Hoc View As...**

Provide a unique descriptive name and save to your private folders in Ad Hoc Components | Views

Click **Save**

The screenshot shows the 'New Ad Hoc View' interface. The top toolbar contains a 'Save' icon (a floppy disk) which is highlighted with a red box. A dropdown menu is open from this icon, showing three options: 'Save Ad Hoc View', 'Save Ad Hoc View As...' (highlighted in blue), and 'Save Ad Hoc View and Create Report'. A red arrow points to the 'Save Ad Hoc View As...' option. Below the menu, a table titled 'Course Completions' is visible, with columns for 'Course Full Name and ID', 'First Name', and 'Last Name'. The table contains several rows of data. In the foreground, a 'Save As' dialog box is open. It has a 'Data View Name (required):' field with the text 'Your Ad Hoc View' and a red arrow pointing to it. Below this is a 'Data view Description:' field. The dialog also shows a file explorer view with a tree structure: 'Demo Dev' > 'Ad Hoc Components' > 'Topics' > 'Views' (highlighted in blue). A red arrow points to the 'Views' folder. At the bottom of the dialog are 'Save' and 'Cancel' buttons.



If you have any questions do not hesitate to contact the

Lambda Solutions Customer Support Team at [+1.877.694.5289](tel:+18776945289)

or support@lambdasolutions.net and they will help you out.

