Accolade Charts and Reports Quick Reference

Navigating Accolade Charts and Reports

Reporting Options in Accolade

There are four methods that pull and filter Accolade data:

- Online Reporting
- Reporting in Excel with Accolade Office Extensions
- Reporting in Excel available for download
- SQL Queries including HTML reports

Creating Online Reports

1. From the Charts & Reports page, click **Add New** and select **Online Report** from the drop-down list.
2. Select a subject from the drop-down list to display available column options.
3. Drag and drop or double-click column names to select report columns to include in the report.
4. (*Optional*) Refine the report contents by sorting columns, adding filters, and aggregating data.
5. Click **OK** to return to the report setting and enter details to identify the report.
6. Toggle between and to display a preview of the report, or to edit report details.

To make the report available for all users or to use in configuration setup, you must have a Process Designer with All Reporting rights as an assigned owner who can make the report publicly available.

Accessing Online Reports

Reports on the Charts and Reports page are available for viewing and/or editing based on ownership and visibility rights.

Charts & Reports – reports displayed are considered private, you must be an owner and they are not available for configuration.

Shared Charts & Reports – reports displayed are considered public, and available for viewing or configuration based on access group rights.

Reports can also be attached to projects to display project-specific data. View a report on a project using the Reports page or a pod on a project layout.

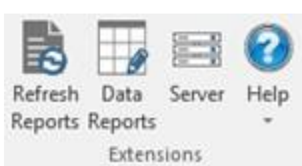
Identifying Report Types

Identify **Charts & Reports** report types by icon.

- MS Excel reports available for download.
- HTML reports defined using a selected query.
- Online reports created within Accolade.
- Charts created based on an Accolade online report.

Reporting in Accolade Office Extensions

Reports created in Excel using the Accolade Office Extensions add-in pull data from Accolade and allows you to analyze and report on data in a format that aligns with company needs.



Reports can be managed outside of Accolade or can be uploaded to Accolade for viewing from the **Charts & Reports** page or from within a project.

Refreshing Data in Excel Reports

When you open an Excel file on the **Charts & Reports** page, the file is automatically downloaded to your computer and refreshed with the most current data from Accolade.

If you are editing columns or modifying filters to explore alternate possibilities, you can manually refresh the data by clicking **Refresh Reports** in the Accolade menu in the Excel ribbon.

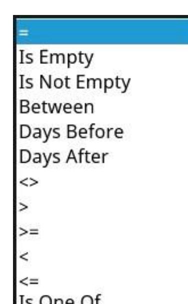
Creating Excel Reports using Accolade Office Extensions

1. From Accolade menu in the Excel ribbon, click **Data Reports**.
2. Ensure you are connected to the appropriate server and click **Add New**.
3. Select a subject and add columns as necessary
4. (*Optional*) Use the **Filters** tab and **Report Details** tab to add filters, rename the report, and place the report in the workbook.
5. Click **Done**.

Filtering Reports

Use filters to build reports that display according to the project viewed.

1. Drag and drop a column to the filters section.
2. For each filter select the applicable operator from the dropdown.
3. Chose the filter control and enter a value based on the selected control in the text box.



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Accolade Charts and Reports Quick Reference

Charting Report Data

Build charts based on Accolade online report data to visually represent all or a portion of data returned in the report.

Available chart types:

- Bar Chart
- Grouped Bar Chart
- Stacked Bar Chart
- Bubble Chart
- Line Chart by Columns Chart
- Pie Chart
- Radar Chart
- Line Chart Trends Chart

Viewing and Locating Charts

Charts can be viewed in several places:

- From the **Charts & Reports** page in either **My Reports** or **Shared Reports**
- On a project within a layout
- On a landing page or page created using global links

Anyone with All Reporting Rights can create a chart in Accolade. To view a chart however, a user must be either an owner of the chart or have one or more matching user roles as defined on the chart, and either Refresh Workbook Data or All Reporting rights assigned.

Creating Charts Based on Report Data

Only online reports created in Accolade can be used to create charts.

1. From the **Workspace** menu, select **Charts & Reports**.
2. Click the **Add New** and select Chart from drop-down. Select the chart type by clicking the appropriate icon in the left pane.
3. Enter the general settings to identify the report including the name, system name, roles, and owners.
4. In the **Report Source** field, select the online report containing the data the chart visually represents.
5. In the chart-specific fields, select the report columns that represent measurements plotted on the chart.
6. Enter display information like color theme, legend position, and opacity.
7. Click **Save**.

   If editing an existing chart, click to view the new chart.

Adding Charts to Project Pages

Create a layout containing a chart pod

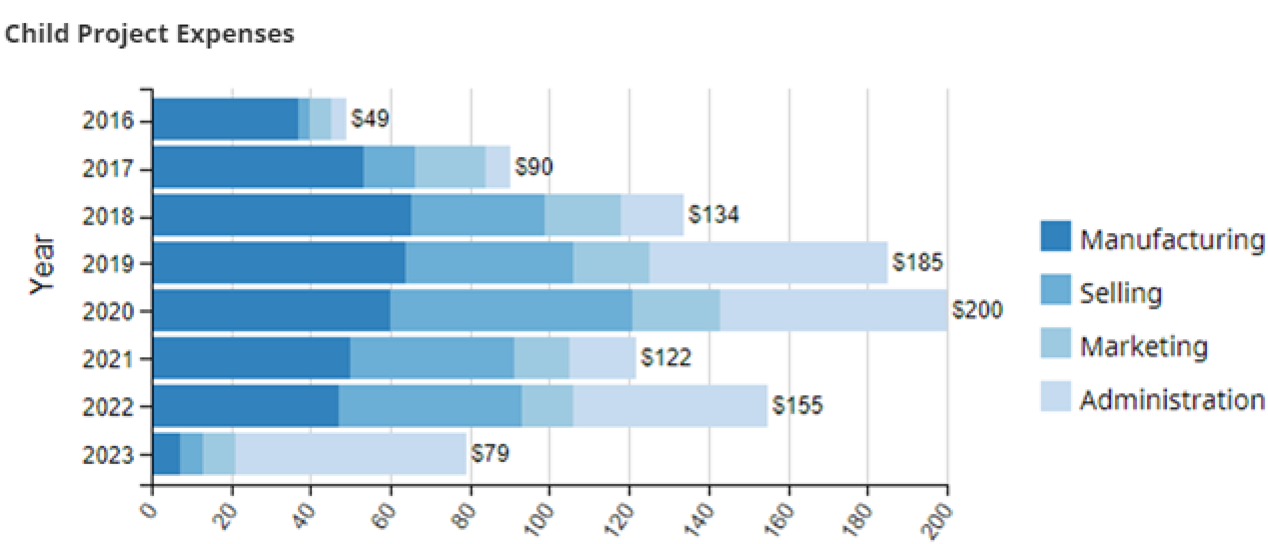
1. Create a new layout.
2. Click to add a pod to the layout.
3. Select the pod and select Chart in the **Type** section.
4. Select the chart to display in the **Content** section and further define the layout display. Resize the pod to fit the chart.
5. Click **Save.**

Associate the layout to the model

1. From the model editor of the selected process model (**Process > Models**), navigate to the **Visible Tabs** section.
2. Select the layout containing the chart from the **Layouts** section.
3. Click **Apply.**

Create a project based on the model

1. Create a project (**Project > Add New**).
2. View the layout as a project page in the project left navigation pane.



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