

ESR Business Intelligence

Saving Custom Columns

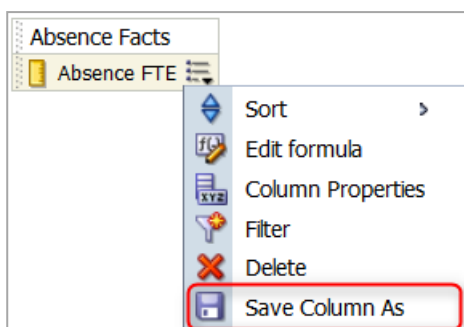
Introduction

This guide has been created to ensure users are aware of the Save Column As functionality available to ESR Business Intelligence (ESRBI) administrators.

Save Column As

Users are able to save custom columns as column objects in the Catalog, allowing them to be reused within other analyses based on the same subject area.

Users should enter their custom column formula using the Edit Formula option. When happy with the results of the formula, the Save Column As option is used to save the custom column as a column object within the Catalog:



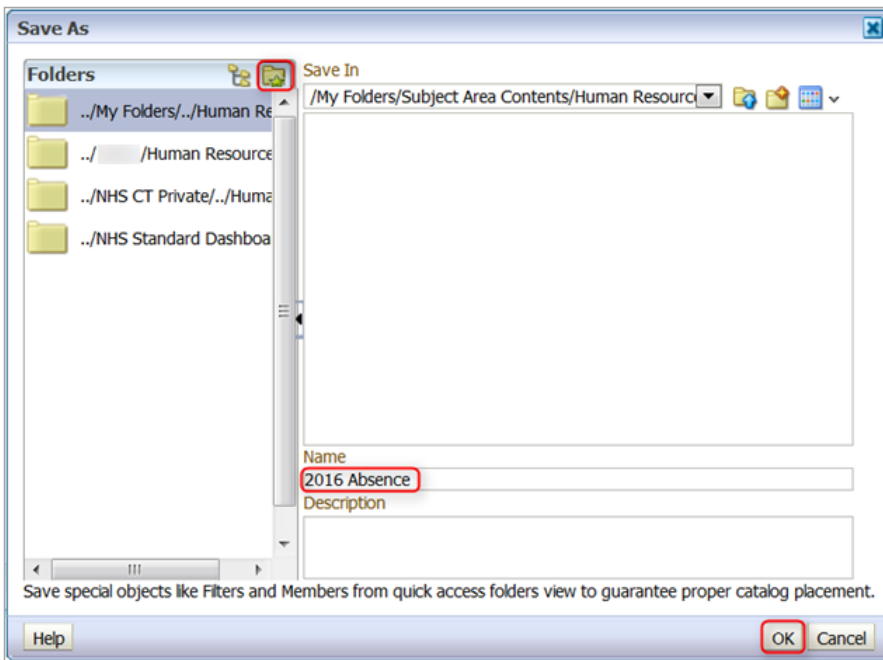
When the Save Column As icon is selected, a Save As box is displayed allowing users to choose the folder location in which to save the Column:

Saving in the Subject Area Contents Folder area



Electronic Staff Record



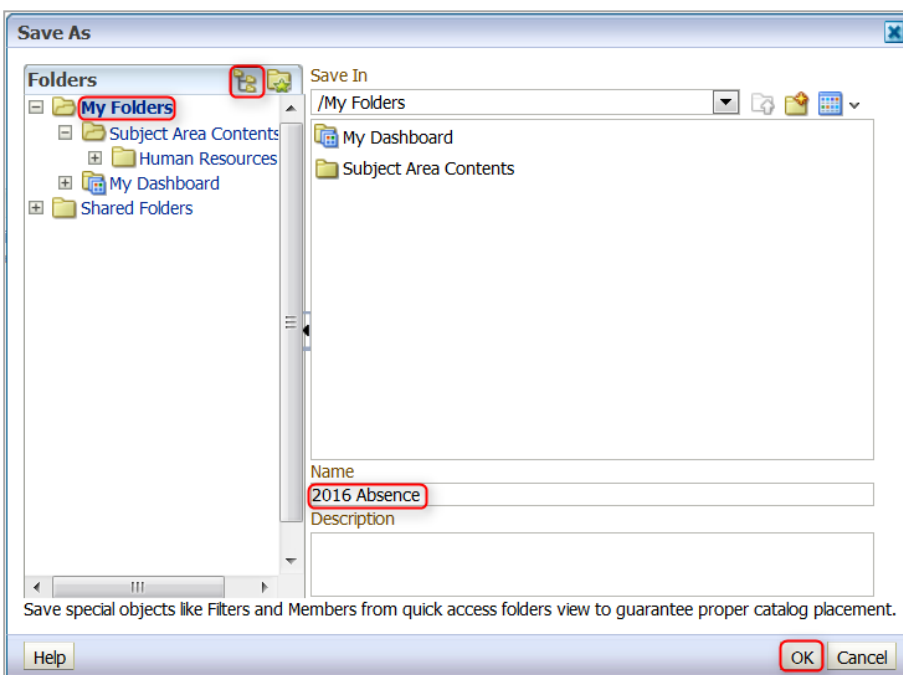


Selecting the highlighted gold-star folder icon enables users to quickly save the column in the Subject Area Contents Folder. Users are advised to save custom columns within the relevant subject area folder to ensure that they are easily available when creating an analysis using the same subject area.

Press OK and the column is saved.

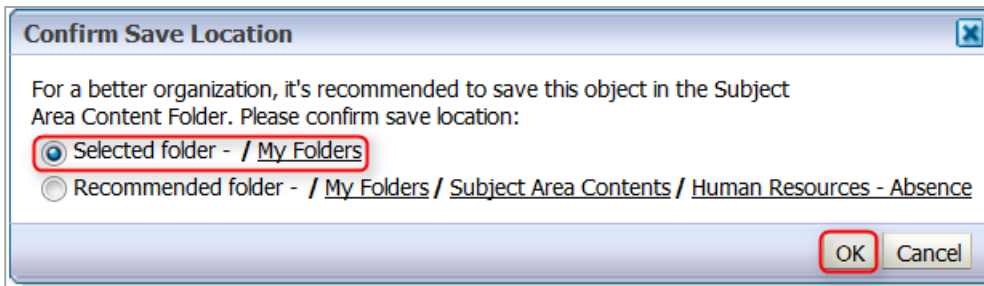
Navigation Path: Business Intelligence > New > Analysis > Custom Column Formula > Save Column As

Saving in the My Folders area



To save the column within the Catalog structure outside of the recommended Subject Area Contents folder, users should select the highlighted Folder Tree icon and save the column within the desired folder.

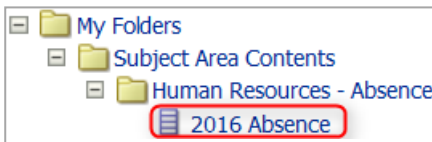
The Confirm Save Location window will be displayed asking users to confirm the saved location:



Navigation Path: Business Intelligence > New > Analysis > Custom Column Formula > Save Column As

Re-using the column saved in the Subject Area Contents Folder

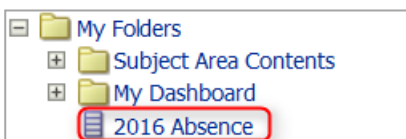
Users can use a saved column object within other analyses (based on the same subject area) by selecting it from within the "Subject Area Contents" sub-folder using the Catalog window within the Criteria Tab:



Navigation Path: Business Intelligence > New > Analysis > My Folders > Subject Area Contents > Human Resources – Absence (in this example) > 2016 Absence

Re-using the column saved in My Folders

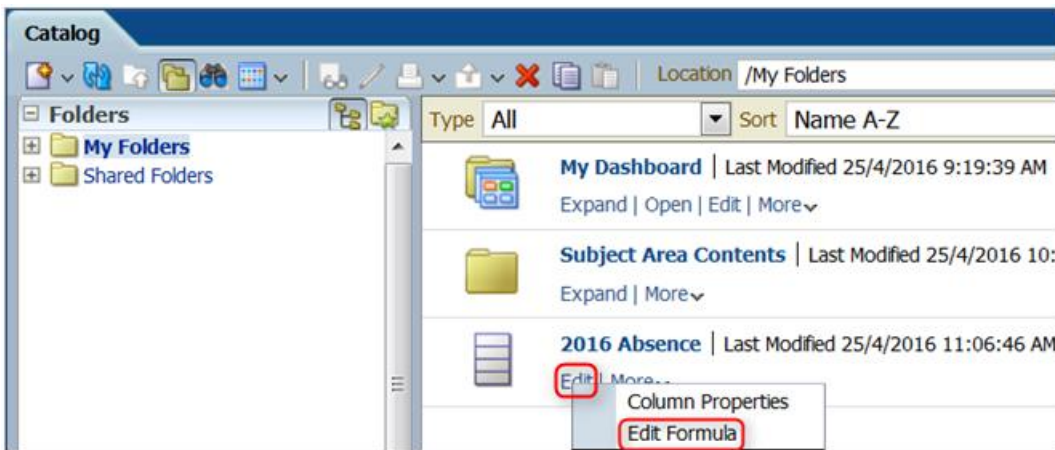
Users can use a saved column object within other analyses (based on the same subject area) by selecting it from within the "My Folders" sub-folder using the Catalog window within the Criteria Tab:



Navigation Path: Business Intelligence > New > Analysis > My Folders > 2016 Absence

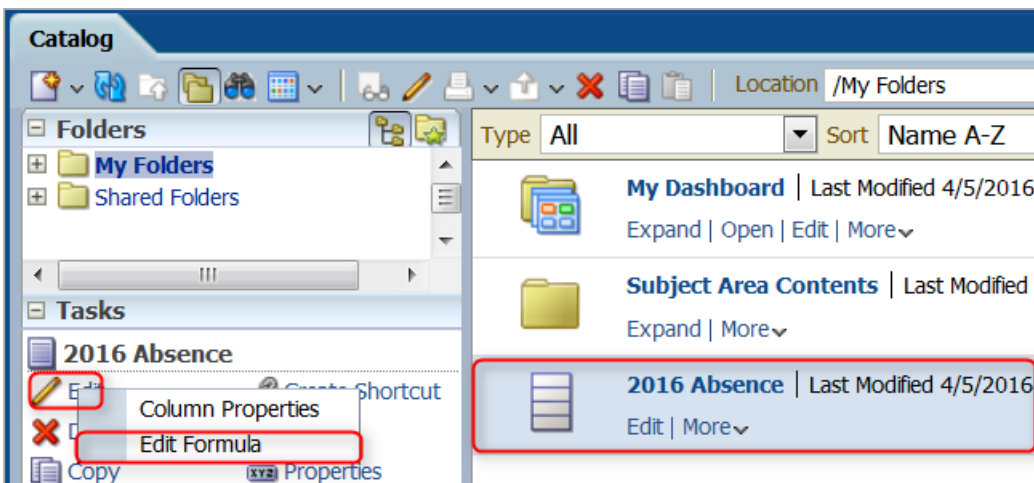
Please Note: Once your column is saved, the formula cannot be edited in the normal way. To be able to change it, users can access it via the Catalog pane or page:

Option 1:



Navigation Path: Business Intelligence > Catalog > Custom Column > Edit > Edit Formula

Option 2:



Navigation Path: Business Intelligence > Catalog > Custom Column > Edit > Edit Formula

It is also important to note that all the changes made in the Catalog will be applied to every analysis that uses the saved column. However, if a column is modified within a particular analysis, changes will be valid only for that analysis.

