The UW-Eau Claire data warehouse Interactive Reporting (IR) Workspace provides query frameworks to allow you to access information from MyBlugold CampS, Financials, and the HRS system. Data supplied through this system is generally current as of the previous evening or as specified by the query (some queries purposely use "frozen" data as of a particular date to allow data comparisons).

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Accessing the IR Workspace

Your UW-Eau Claire log-in is required to sign into the IR Workspace, and you must be granted access to particular queries. To request access, please see instructions in MyBlugold CampS Requesting Access.

*NOTE: If you are using a Mac, you will need to use Lab Anywhere (also called the Virtual Lab) to access the IR Workspace. Check out the LTS Help Documentation regarding how to use Virtual Lab Anywhere on a Mac or via web access. For further assistance, contact the LTS Help Desk at 715-836-5711 or helpdesk@uwec.edu.*

Once data warehouse permission is granted, the Interactive Reporting Workspace can
be accessed by any of the following methods.

- Copy and paste the following link into your Internet Explorer browser:
  https://bi2.fastar.wisconsin.edu/workspace/index.jsp.
- Use the link found at the top of the MyBlugold CampS main page:
- Access via the UW-Eau Claire home page:
  - Click **Faculty/Staff**.
  - Select **Data and report finder** from the sidebar on the left. The data warehouse SharePoint page will open.

No matter your method of access, you will be presented with the UW System Authentication Redirector. Click **University of Wisconsin-Eau Claire**, and click **Select**. Log in with your UW-Eau Claire username and password when prompted.

**Finding Desired Queries**

When first entering the **IR Workspace**, you will see the home page. On the home page, you will see various options, such as **Recently Opened** and **Favorites**. The best way to find the desired query is to use the Explore view.

1. Click **Explore** near the top of the screen to go to the folders and queries page.

   *NOTE: The directory tree includes folders primarily organized by subject.*

2. Double-click on the **EAU CLAIRE** folder (it is usually the default) on the list at the left, and then browse those folders as you would in Windows Explorer.

   *NOTE: The folders can be expanded or collapsed by double clicking on the folder*
3. Expand the folder containing the query you wish to process.

4. Double-clicking on a query's title automatically opens the query in the IR Workspace.

   HINT: You may also right-click on the title and click **Open As**, which gives you a choice of which client view you would like to use (as opposed to just opening in the default).

### Running Queries and Using the Results

Depending on how your defaults have been set up, you may have either of two views of the query. Follow the instructions for the version you are viewing.

- The HTML client is a web-based tool which shows the query in the same set of browser screens. It is generally the default tool.
- The Interactive Reporting Web Client shows the query in a separate browser screen with more options. It requires a plugin to be installed on your desktop.

To set the web client as your default tool, complete the following steps:

   a. From the **File** menu, select **Preferences**.
   b. Select **Interactive Reporting** from the left-hand side of the screen.
   c. Select **General** from the top right corner of the screen.
   d. Change the **Default Open Format** to **Interactive Reporting Web Client**.

### HTML Client

Note that many of the tools discussed in this section can be found on the HTML navigation bar shown below.
1. (Optional) Click **Notes** or **Home** in the section listing in the sidebar on the left. Some queries may have multiple options, and you may need to access each one separately. The *Notes* section will warn you about any special steps needed.

2. Click on your report in the sidebar on the left.

3. Click the **Refresh** button to refresh the data by running the query.

4. After clicking Refresh, the filter dialog box will display. Select your filtering criteria, repeating the following steps until all desired criteria are selected.
   a. When viewing the *Custom Values* tab, use the text box to enter your selection criteria one at a time.
      
      OR
      
      Click the **Show Values** tab and select the value(s) you want for the criteria. *NOTE: To select multiple values, hold down the CTRL key and wait for the screen to refresh before making another selection. Use the Shift key for contiguous selections.*

   b. Click **Set** to include the highlighted selections in your filter or **Ignore** to avoid limiting on this filter.
5. When the query completes, your data will appear on the screen. If there are multiple reports listed in the left sidebar, click on the report you want from the list.

<table>
<thead>
<tr>
<th>Instructor Name</th>
<th>Class</th>
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<tbody>
<tr>
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<td>009</td>
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<td>Sem Est Est</td>
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<td>ENGL 112</td>
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</tr>
</tbody>
</table>

6. Use the navigation bar to view and export your data. Hover over icons for tool tips.

7. Only one page of data is displayed at a time. Use the page up and page down arrows to move from page to page.
8. Do NOT use this save file locally icon.

9. You have a couple of exporting options: you may export your data to a PDF or export to Excel (.xls).

10. Click in the upper right-hand corner of the data window to close out of a query, or right click the open document on the document tab bar at the bottom of the screen.

Interactive Reporting Web Client

Many of the tools discussed in this section, can be found on the Web Client navigation bar shown below.

1. (Optional) Click on Notes or Home in the section listing in the sidebar on the left. Some queries may have multiple options, and you may need to access each one separately. The Notes section will warn you about any special steps needed.

2. Process from home. If no home section is available, click on the query or results you desire in the sidebar on the left.

3. Click the Process All option to process.

4. The filtering dialog box will display. Select your filtering criteria, repeating the following steps until all desired criteria are selected.
   a. Use the text box to enter your selection criteria one at a time.
   b. Enter your selection criteria or click on Show Values and select the value(s) you want for the criteria. To select multiple values, hold down the CTRL key.
and wait for the screen to refresh before making another selection. Use the
Shift key for contiguous selections.

**c.** Click **OK** to include the highlighted selections in your filter or **Ignore** to avoid limiting on this filter.

5. When the query completes, select the desired report.

   *NOTE: All of your data will display on the screen so you can scroll to see it (no need to use arrows to move between pages).*

6. To export the data go to the following path on the menu: **File > Export > Section...**

7. Change the **Save in** to point to your desired folder.

8. Change the **Save as type** to the desired type.

   *NOTE: To export to a PDF, select the **PDF** option. To export to Excel, select **CSV.***

9. Change **File name** to the desired name and **Save**.

9. Click in the upper right-hand corner of the data window to close out of the query.

**Change Your Query Interface**
The IR Workspace will normally display your query based on the default you have set up in your profile. You can change this for a particular query or as an ongoing default.

- Choose your query interface for an individual query by right-clicking on the query rather than double-clicking. Then select Open As and your desired format, HTML or Interactive Reporting Web Client.
- Change your default format by clicking File » Preferences... » Interactive Reporting » Select HTML or Interactive Reporting Web Client from the Default Open Format pull-down menu.

Help Resources

When logged into the IR Workspace, you will have access to help resources:

1. Click the Help icon to access help documents.
2. Eau Claire documents are published in the Eau Claire/_Help folder.
3. The data warehouse SharePoint site.

Logging Off

1. Click Log Off in the upper right-hand corner of the screen.
2. Close your browser window to complete the log off process.