

Navigation and Common Terms

Table of Contents:

- [Navigating a Site and Its Reports](#)
- [Basics of Reports](#)
- [Anatomy of a Report](#)

Navigating a Site and Its Reports

A Site's content is presented to you (based on your permissions) as a series of folders called **Projects**. Projects can be thought of as workspaces for content to be grouped. Typically this is done for each NocTel service reporting exists for. This means depending on your organization's subscriptions, you may see a NocTel Talk and/or a NocTel Flow reporting Project. Custom reporting will also generally be in its own Project.

Regardless of what the hierarchy and grouping scheme is, Projects are there to better organize and federate reporting access.

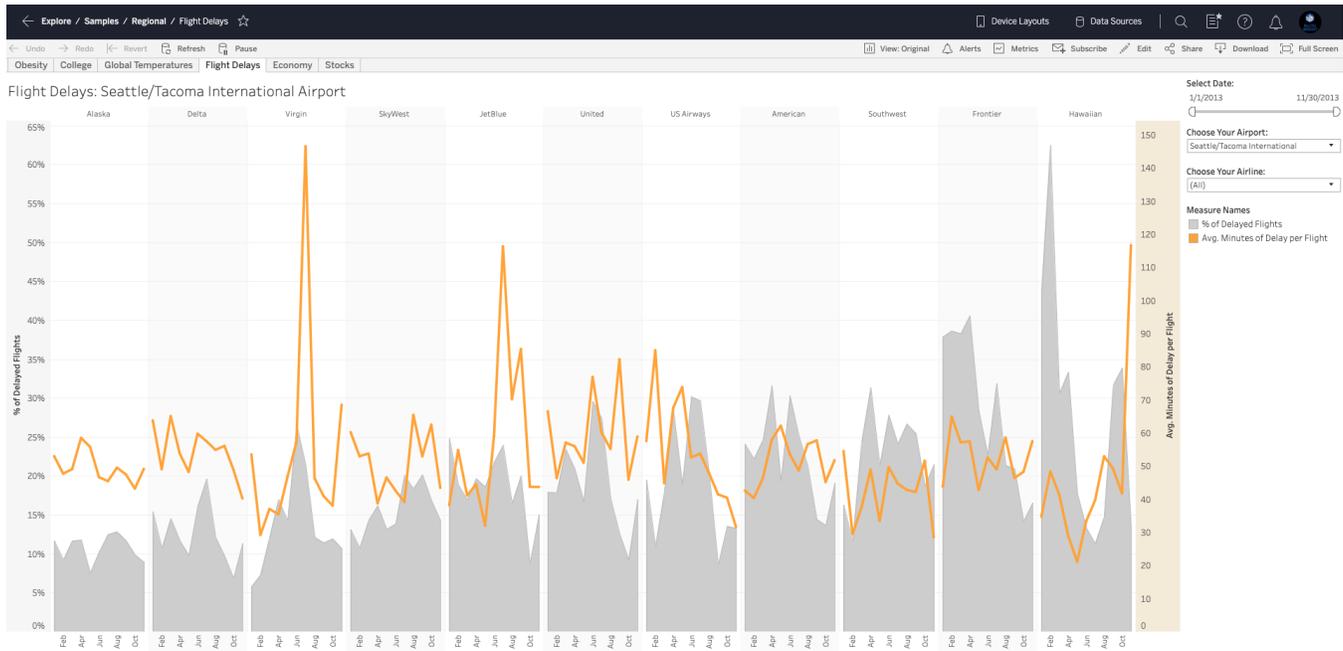
When you navigate into a Project, you will see several listed objects. These are **Reporting Workbooks** and contain reports that are published to NocTel Insight that share the same working set of data. Even though multiple Reporting Workbooks might use most of the same underlying data, there may be differences between each making it infeasible to simply publish a single Reporting Workbook.

Reporting Workbooks are, as you would expect, composed of **Reports**. You can think of a Reporting Workbook similarly to an Excel workbook.

Basics of Reports

When you navigate into a Reporting Workbook you will be presented with the reports you have permission to access. Reporting content - Projects, Reporting Workbooks, and Reports - may vary from user to user within the same organization.

From within a Reporting Workbook, selecting and opening a Report will open to a new view similar to this (as an example):

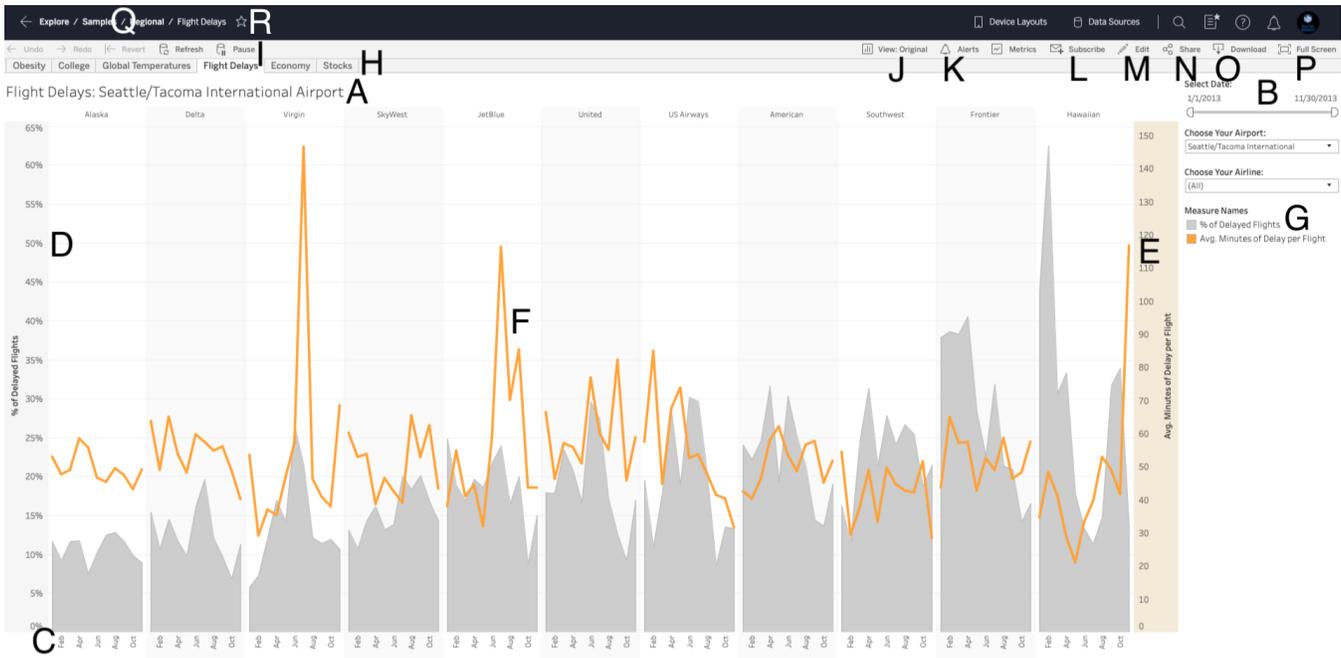


The **presentation** of a Report may vary based on the following:

- The values selected (or de-selected) in **Filters**
- Values set (or not set) in **Parameters**
- Granularity based on **Zoom Level** of date/timestamp fields

Anatomy of a Report

As a user this is where things become interesting. The presentation/rendering of Reports within NocTel Insight present many points of interaction. These various points of interest will be described here briefly and be in reference to the same example Report in the above section.



Report Title (A) designates the title of this report and its associated visualization. In most cases the report listed in Insight under the corresponding Workbook will be the same as what is displayed in the report itself. In most cases, a brief summary of the report and any pertinent information will be included under the Title. In some cases the title displayed here will update dynamically to reflect what is being reported on. When exporting, the displayed Title is not used - the Report name is used. From the example above, this would be "Flight Delays".

Filters and Parameters (B) live on the right-hand side of the report window. Filters and Parameters are discussed in greater length in a later section (see Understanding Filters and Understanding Parameters). Filters and Parameters are used to adjust what data is displayed and can also affect the *way* in which the data is grouped or evaluated. Changing values in both occur in *real-time*, though depending on the overall working size of the data set, it may take a few seconds to show you the results and adjustments. The presentation and type of Filter/Parameter will vary with each report.



Patience is a virtue! Insight can work with very large sets of data, but Filters and Parameters may require complete recalculation and grouping of the data to suit your needs. Avoid making additional changes to any Filters or Parameters while waiting for your most recent settings to be calculated and displayed.

If you change any Filter or Parameter values mid-calculation, Insight will abort the in-progress analysis and immediately try to start processing the data again with the newest values set in Filters and Parameters.

Rows/X-Axis (C) are generally synonymous with one another depending on the type of visualization used for the report. If the Rows/X-Axis include a **Date**, the level of granularity (zoom level) can be adjusted in or out depending on the native precision of the data. That is, a YYYY-MM-DD Date could be zoomed in/out between Day, Week, Month, Quarter, and Year; but not into by Hour or Minute because the Date format *doesn't have time precision*. The zoom level is adjusted by hovering over any Date or Time field and selecting the + to zoom *in* (e.g.: from Days to Hours) or - to zoom *out* (e.g.: from Days to Weeks).

Columns/Y-Axis (D) are generally synonymous with one another depending on the type of visualization used for the report. In most cases, the Y-Axis on graph charts will only contain a single rubric or measure; though it is possible but more uncommon in standard reporting to have dual axes (**E**). Displaying *separate axes* on the extreme ends of the visualization generally lead to confusion over interpretation. In most cases, dual axis visualizations will only display a single y-axis that's synchronized for both plots so the scale is balanced.

Report Data Pane (F) is where the reporting data/results are displayed depending on the type of visualization used. In most cases, you will be able to hover your cursor over individual data points and view that point's specific data or similar useful information relating to it. This behavior generally does not occur for *table format* reports as it makes for a redundant conveyance of data.

Visualization Legend (G) is displayed when there is a graphical chart used for the report. The legend will list the color association of plots on the chart. You can select a specific measure in the Legend to gray out all the other plots leaving only the selected plot fully visible. This is best used to verify or call out plots that are very small or nuanced on the full scale.

Workbook Tabs (H) are displayed when the Workbook the open report is associated with has multiple reports published within it. This functions nearly identically to switching Worksheets in Excel. The tabs displayed may vary between users depending on the individual user permissions to the reports within the corresponding Workbook. Reports from other Workbooks are **not** displayed here - you must close the current report and open a report found in a different Workbook.

Report Data Actions (I) are generally not going to be visible to the typical user unless they have access to a reporting sandbox. These actions can be used to request Insight fetches the most up to date available data from the respective backends and pulled into the report. These controls work in conjunction with the **Edit (M)** option, which allows for web authoring of reports.

Report View (J) is an immensely useful function which allows you to set Filters and Parameters to specific values as well as zoom level of Dates/Times along X- and Y-Axes, then save those selections for quick navigation back to those settings. This can be used to create a series of predefined Views to quickly jump between particular presentations of the report data without needing to manually adjust Filters, Parameters, and zoom level. Saved Views can also be set to be the default view of the report when you access it. They can also be made public (to the account) or shared with other users.

Alerts (K) allow for a *quantifiable* threshold to be defined on reports. When this threshold is met the user is emailed a notification as such. This allows for "set it and forget it" reporting that alerts you when something of defined relevance has occurred.

Subscriptions (L) are similar but distinctly different from Alerts in that a Subscription will send a summary email notification to the user (or valid users in the account) on a timed basis. The subscription email is sent on a scheduled basis and contains an **embedded image** of the report, *not the full raw data*. Subscriptions cannot send the raw data as it's possible that it may exceed the maximum allowed attachment size. It may also be flagged by your organization's spam filter or cause a false positive detection of webmail antivirus scans

The "Include Entire Workbook" option for subscription will cause the default View of all reports within the Workbook to be sent.

 **Only licensed NocTel Insight users** can be subscribed to reports. We do not recommend creating a NocTel Insight user whose associated email address to the username is a mailing group. While doing this will allow many users to receive subscription notices, it also creates a single point of management failure if a user that's part of the mailing group unsubscribes or otherwise modifies account settings in an undesired way.

Sharing (N) allows for a report as displayed to be shared as a webpage link or as a webpage embed in HTML. Please be aware that when sharing report webpage links that the recipient opening it must be able to login in to Insight on the same Account and also have sufficient permissions to view the report. Embed links likewise will not work unless your webpage or web app is authenticating to NocTel Insight. Without authenticating Insight will not allow the content to be loaded.

Download (O) when clicked/tapped will expose the options to save the report as displayed or the underlying raw data used to render the report as displayed. The options are:

- **Image** will download a screenshot of just the report as a png image file. The image will be named identically to the report name.
- **PDF** will download a screenshot of just the report as an image embedded in a pdf file. The pdf will be named identically to the report name.
- **Data** will open up in a new web browser window displaying a simple data table of the report's data regardless of its original presentation. This data can be saved as a flat text (txt) file.
- **Crosstab** will save the report data in Excel CSV format. CSV files *do not include column header formatting*.
- **Powerpoint** will save a screenshot of just the report as an image embedded in a Powerpoint file, which gives you a solid working point when building presentations around your data.

 Be aware that the contents of the contents of Excel (Crosstab) exports will be based on the current Zoom Level. For example, if the underlying raw data at the row level consists of exact timestamps, then setting the Zoom Level to By Day will aggregate all the individual rows into day groupings. You will not get the original raw data output of such an export.

Full Screen (P) when clicked/tapped will make the rest of the web browser and Insight interface disappear and enlarge the report visualization to occupy the entire screen.

Navigation Breadcrumbs (Q) are a convenient reminder of where at in the navigation of the Account and Project you are currently in as a frame of reference. Each subpath listed in the breadcrumbs can be clicked/tapped to jump back to that level of navigation rather than hitting Back or swiping to go back to the previous multiple times.

Favorite (R) marks the report when clicked/tapped. Clicking/tapping the star icon again after favoriting the report will unfavorite it. Favorites are exposed by hitting the Filter icon when navigating the Account's Projects and Workbooks by clicking/tapping "My Favorites".

The breadth and variety of reporting content is vast, and we cannot provide in-depth explanation of how to interpret each report here. Most reporting will follow a predictable scheme for consistency and will generally include a **Caption** giving a brief explanation of what the report is conveying and any limitations to avoid incorrect assumption.