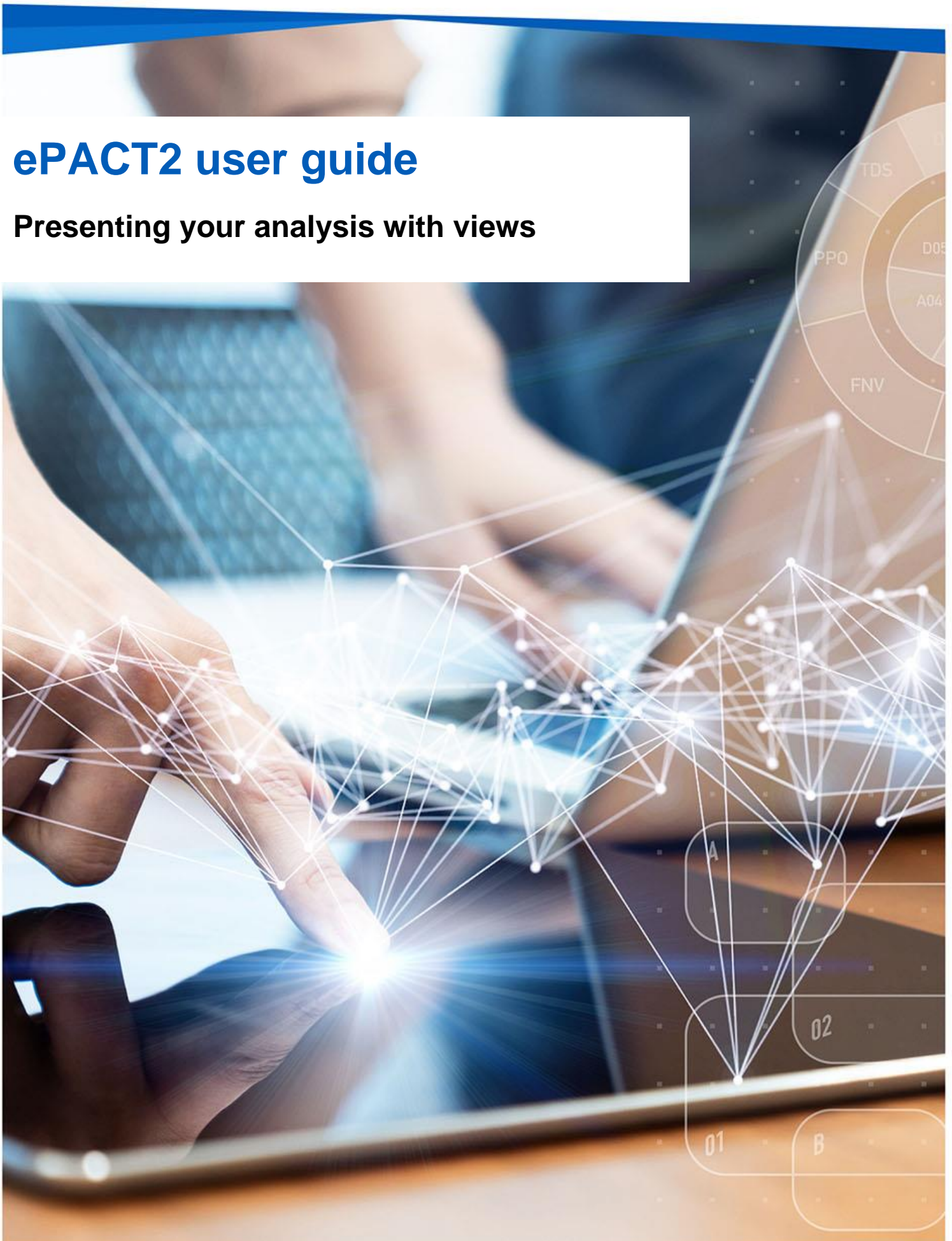


# ePACT2 user guide

Presenting your analysis with views



# Interactive Contents

Use this interactive contents list to jump straight to the content you want to see. Just click the titles below to go directly to that section:

## Contents

### [Adding New Views to analysis](#)

[Editing a View](#)

[Editing the Compound Layout](#)

### [Views Available](#)

[Title View](#)

[Table View](#)

[Pivot Table](#)

[Performance Tiles](#)

[Treemap](#)

[Heat Matrix](#)

[Trellis](#)

[Graph](#)

[Gauge](#)

[Funnel](#)

[Map](#)

[Filter](#)

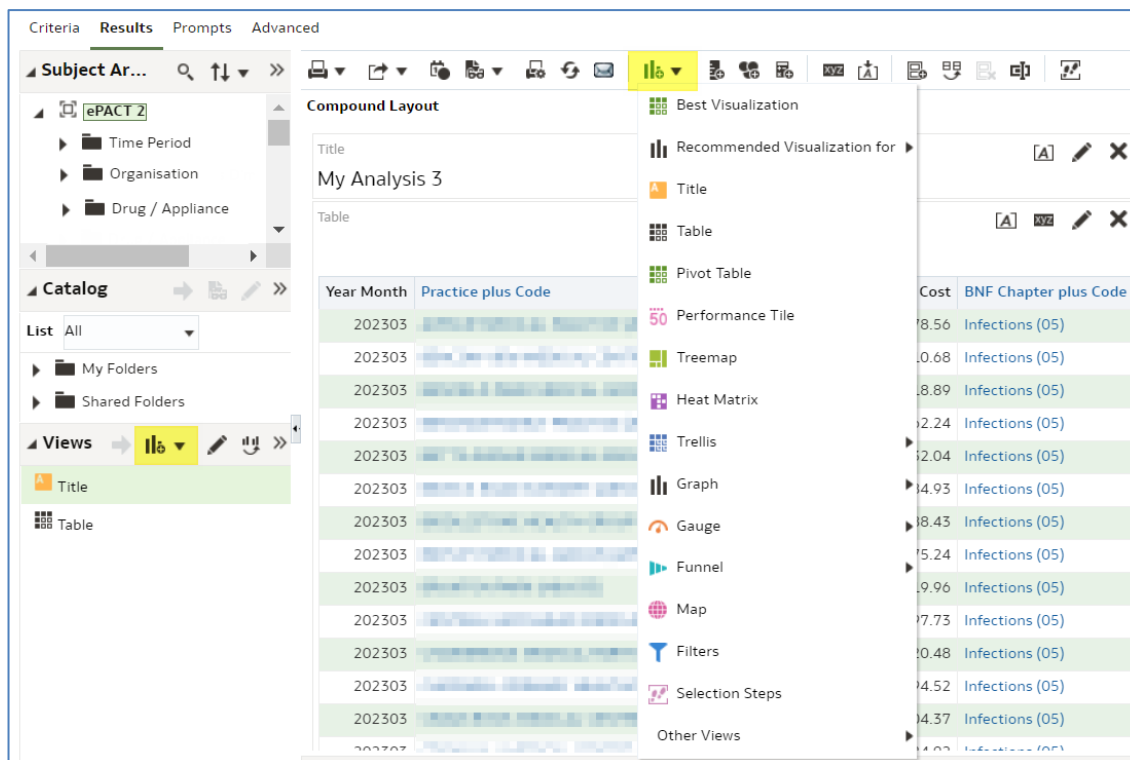
[Selection Steps](#)

[Other Views](#)

### [Getting more help](#)

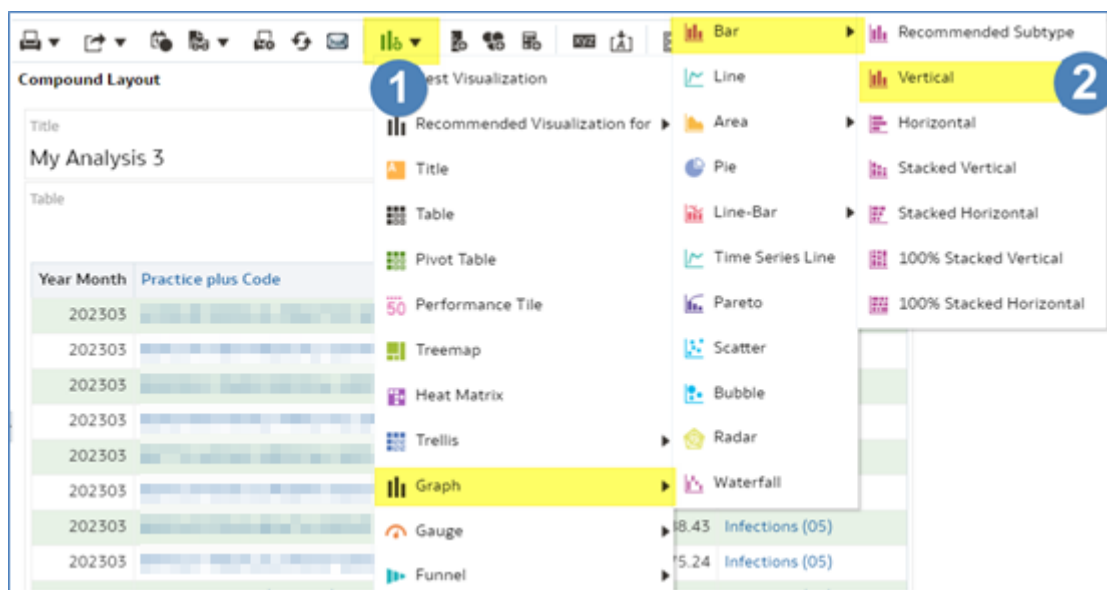
## Adding New Views to analysis

New views can be added from the New View menu, available on either the Views Pane, or the Compound Layout.

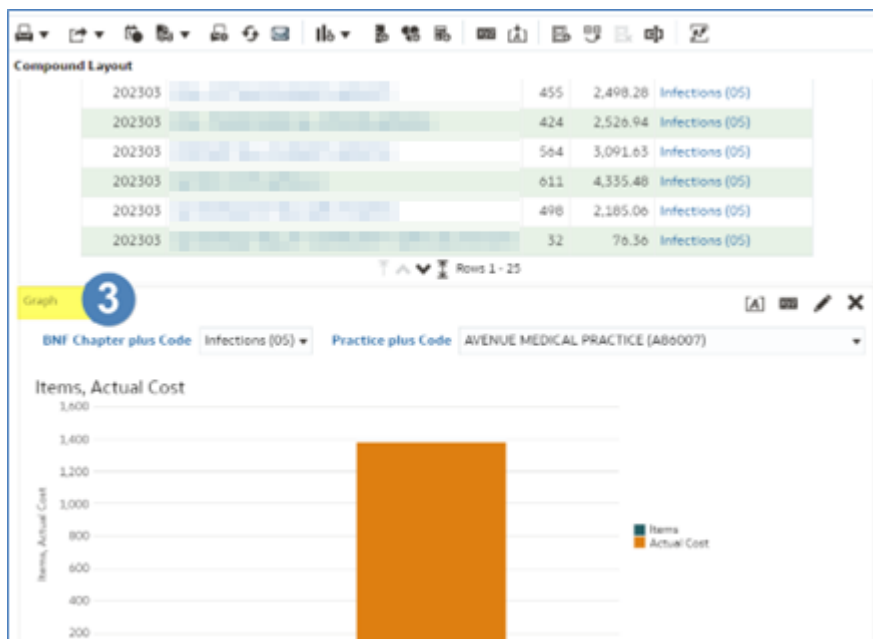


### Adding a view via the Compound Layout

1. Select the 'New View' icon from the task bar.
2. From the drop-down list select the view required; in this example we will select a vertical bar chart.



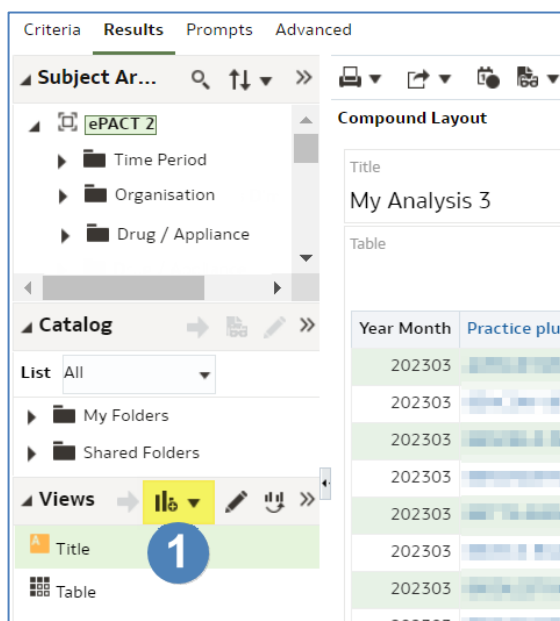
- The view selected will be added below any views already displayed within the compound layout.



If multiple views are created via the Compound Layout it may be necessary to scroll down within the Compound Layout to visualise the new view.

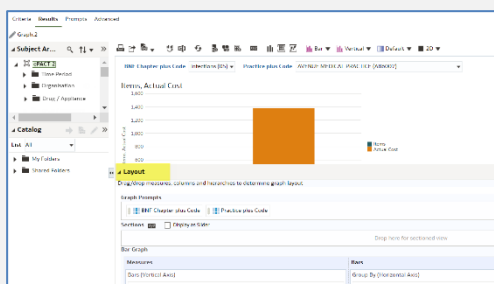
### Adding a view via the View Pane

- Select the 'New View' icon within the View Pane.
- From the drop-down list select the view required; in this example we will select a vertical bar chart.



When including a view using the 'View Pane' the view will be added to the 'View Pane' but will not be included within the Compound Layout.

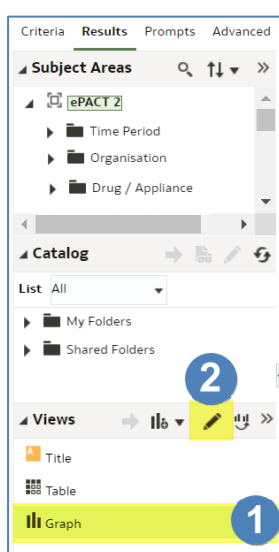
The View will open directly into the 'Layout' pane to allow the editing of the view.



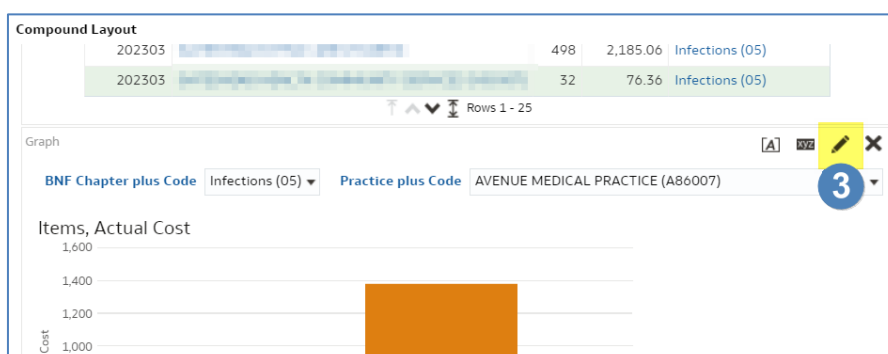
## Editing a View

Every View can be edited from the Views pane.

1. Select the View by clicking to highlight.
2. Click the Edit button to edit view.

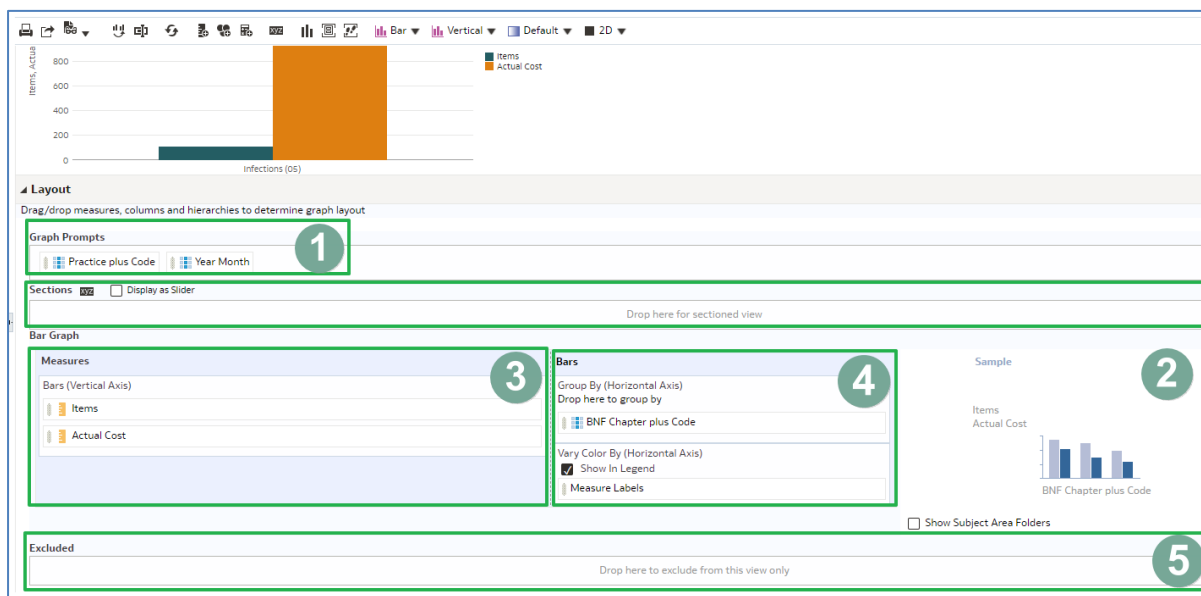


3. Views on display in the compound layout can also be edited through their own Edit button.



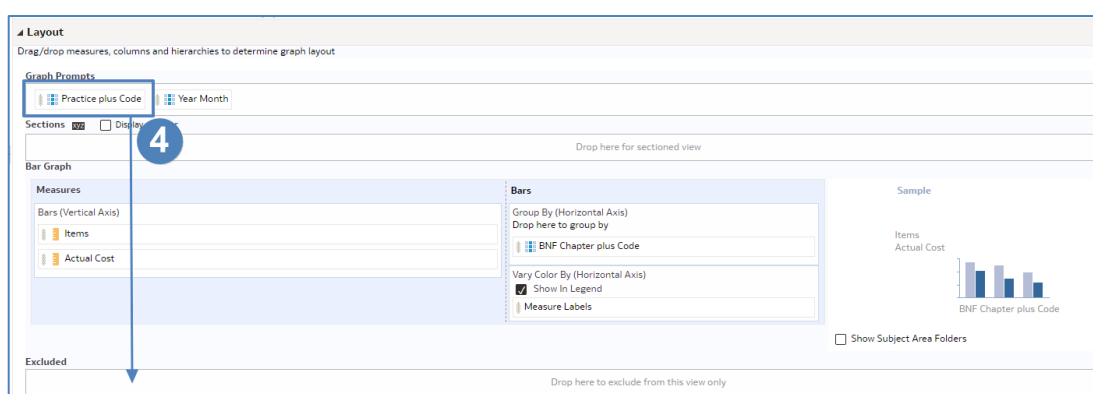


Selecting the 'Edit View' icon will then open the 'Layout' pane; depending on the view the 'Layout' pane may appear slightly differently.

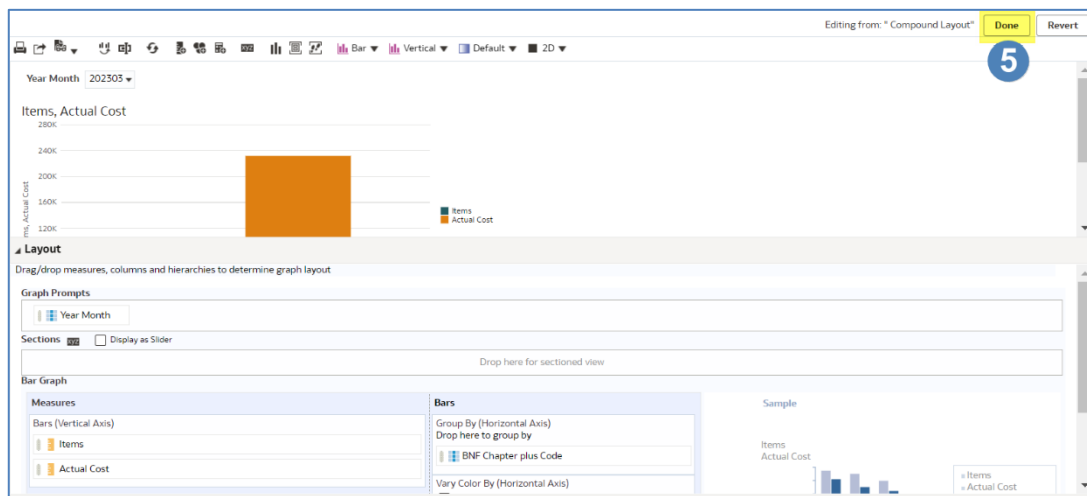


1. Graph Prompts	Creates a prompt based on the column included within the section to allow the user to select the value to display data for
2. Sections	Creates a separate view for each value in the column included in the section
3. Measures	Displays the measures that will be displayed based on the columns included in the section
4. Bars	Denotes how the measures included within the view will be grouped based on the columns included in the section
5. Excluded	Columns included in the section will not be included within the view

4. To move a column within the various sections, left click and drag the column required to the appropriate section.



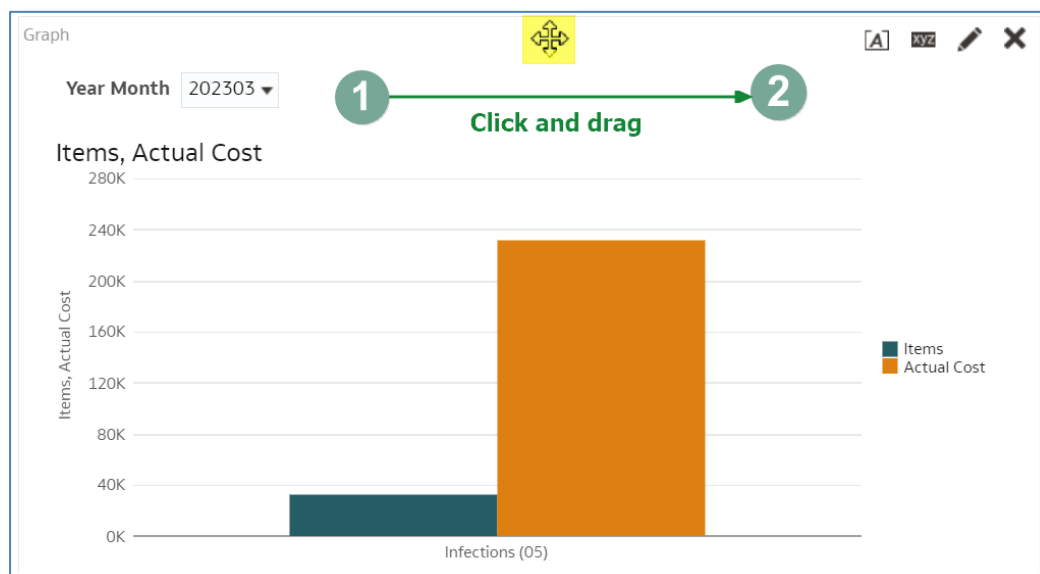
- Clicking 'Done' within the 'Layout' pane confirms any changes and returns back to the compound layout.



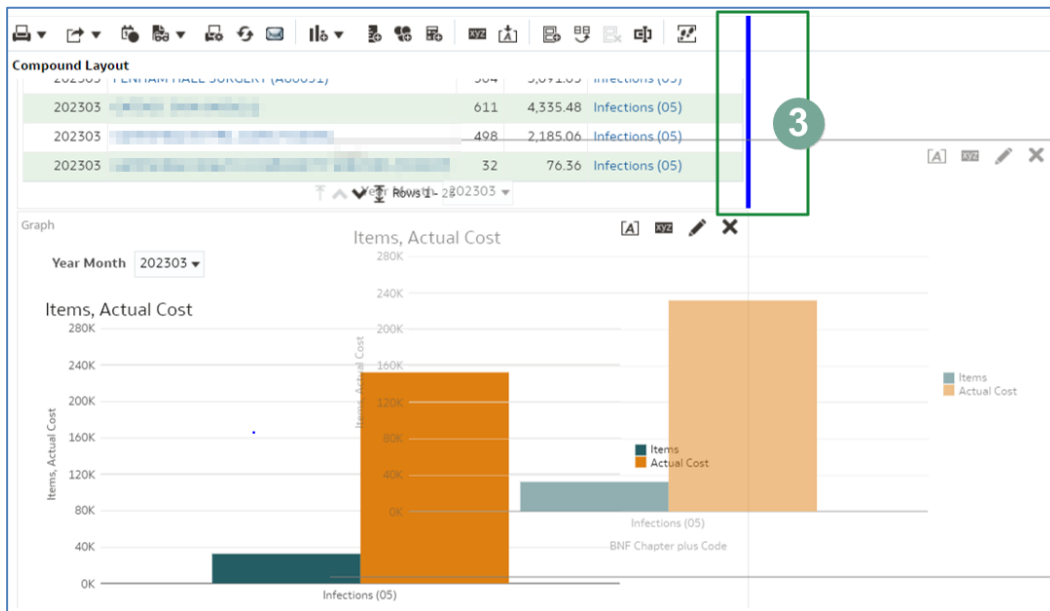
## Editing the Compound Layout

Views can be dragged and dropped around the compound layout. Views can then be positioned to best communicate information.

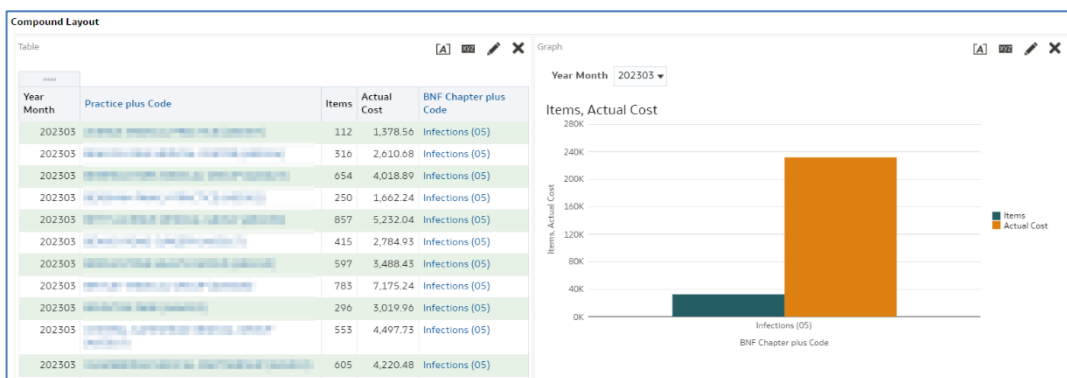
- Hover over the top of the view until the cursor appears as a 4-way arrow.
- Left click and drag the view to the position required within the compound layout.



3. A continuous blue bar will indicate the view will be placed to the side of all other views. You can also position the view above or below other views.
4. A shortened blue bar will indicate the view will be placed to the side of the selected view.



5. The view will now be positioned as required.





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## Views Available

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### Title View

Displays a title, a subtitle, a logo, a link to a custom online help page, and timestamps to the results.

### Table View

Display data organized by rows and columns. Tables provide a summary view of data and let you see different views of data by dragging and dropping rows and columns.

### Pivot Table

Pivot tables structure data like standard tables, but can display multiple levels of both row and column headings. Unlike regular tables, each data cell in a pivot table contains a unique value. They are ideal for displaying a large quantity of data, for browsing data hierarchically, and for trend analysis.

### Performance Tiles

Displays a single piece of aggregate data. Performance tiles use **colour**, labels, and limited styles to show status and use conditional formatting of the background colour or measure value to make the tile visually prominent. For example, if revenue isn't tracking to target, the revenue value may appear in red.

### Treemap

Treemaps organize hierarchical data by grouping the data into rectangles (known as tiles). Treemaps display tiles based on the size of one measure and the colour of the second measure.

By default, the first measure of the analysis in the Criteria tab is selected as the Size by measure, and the second measure is selected as the Colour by measure. If there is only one measure in the analysis, this measure is the default for both Size by and Colour by options. Additionally, the Style element defaults to Percentile Binning with "quartile" as the value for the number of bins.

### Heat Matrix

Displays two-dimensional depictions of data in which values are represented by a gradient of colours. Heat matrixes structure data similarly to pivot tables in that they are formed by grouping rows and columns.

## Trellis

A trellis view is a type of graph view that displays a grid of multiple graphs, one in each data cell.

A trellis view can be simple or advanced. A simple trellis displays a core inner graph multiplied across row sets and column sets, displaying many small multiples that are ideal for comparing and contrasting. An advanced trellis displays a grid of small spark graphs that are ideal for monitoring trends and spotting patterns in a data set

## Graph

Displays numeric information on a background, called the graph canvas. When precise values are needed, graphs should be supplemented with other data displays, such as tables.

Graph's Available:

- Bar
- Line
- Area
- Pie
- Line Bar
- Time Series Line
- Pareto
- Scatter
- Bubble
- Radar
- Waterfall

## Gauge

Displays a single data value on a background, called the gauge canvas. Due to its compact size, a gauge is often more effective than a graph for displaying a single data value.

A gauge view might consist of multiple gauges in a gauge set. For example, if you create a gauge view to show the sales data for the last twelve months, the gauge view consists of twelve gauges, one for each month. If you create one to show the total sales in the US, then the gauge view consists of one gauge. See Editing Gauge Views.

## Funnel

Displays results as a three-dimensional graph. Typically, funnel graphs represent data that changes over time. For example, funnel graphs are often used to represent the volume of sales over a quarter. In funnel graphs, the thresholds indicate a percentage of the target value, and colours provide visual information for each stage. You can click one of the coloured areas to drill down to more detailed information.

## Map

Displays results overlain on a map. Depending on the data, the results can be overlain on top of a map as formats such as images, colour fill areas, bar and pie graphs, and variably sized markers.

## Filter

Displays the filters in effect for an analysis. Filters, like selection steps, allow you to constrain an analysis to obtain results that answer a particular question. Filters are applied before the query is aggregated.

## Selection Steps

Displays the selection steps in effect for an analysis. Selection steps, like filters, allow you to obtain results that answer particular questions. Selection steps are applied after the query is aggregated.

## Other Views

- Column Selector
- View Selector
- Legend
- Narrative
- Ticker
- Static Text
- Logical SQL
- Create Segment
- Create Target List

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## Getting more help

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### **Additional training material and user guides**

The ePACT2 training team has developed several how to guides to help you get the best out of ePACT2. These can be found on our [ePACT2 user guides page](#)

### **Webinar sessions**

We offer a free webinar training service to all our users and you can book as many sessions as you need.

Our webinar sessions are booked as 1hour slots and we offer a number of different sessions covering a range of topics.

We also offer bespoke sessions which are delivered just to you or your invited colleagues. You can let us know if you have any specific topics or reports you'd like to cover or if you would prefer an introductory tour of the system.

Our experienced trainers deliver these sessions using MS Teams and you can take part wherever you are as long as you can get online.

You can find our more and book your webinar by going to our [ePACT2 training page](#)