Precision Campus Administrator Guide

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OVERVIEW

Precision Campus uses two environments:

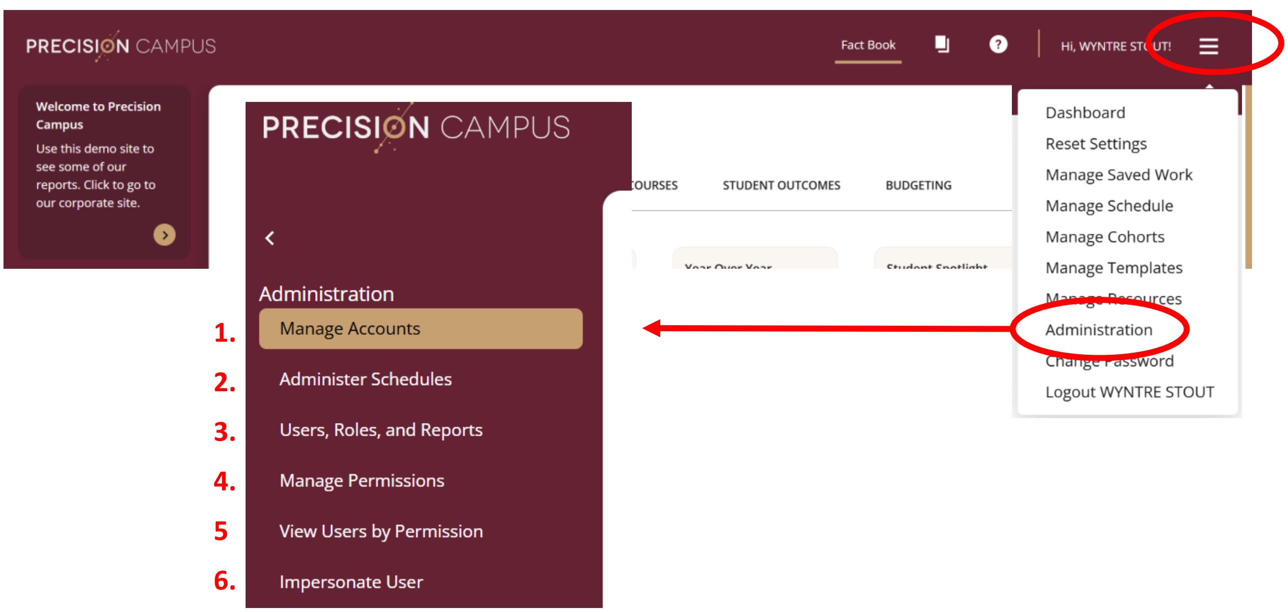
- **Prod**: production environment accessible to all users (URL prefix = data2)
- **Dev**: development environment for staging and administration (URL prefix = hep-data-web-development)

Some administration actions, primarily setting user access, take place from within the main Precision Campus development and production sites. All other administration actions are available within the Admin tool.

ADMINISTRATION FROM MAIN SITE

User Roles & Access, Schedules

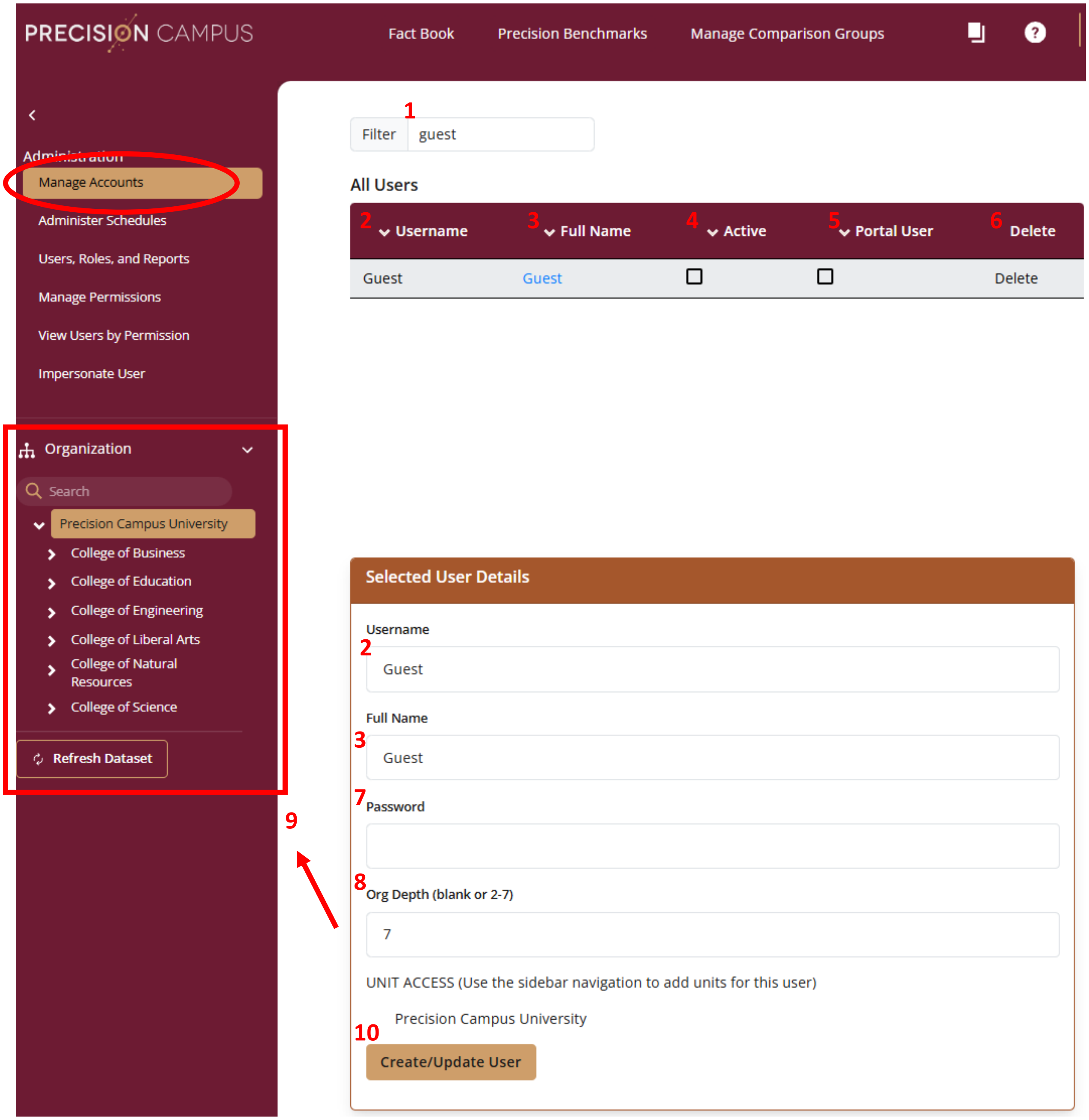
User access and permissions are configured in the Administration section of the development and production sites. Permissions are set separately for development and production.



1. **Manage Accounts** – manage user accounts, passwords, and organization access
2. **Administer Schedules** – manage scheduled distributions of reports
3. **Users, Roles, and Reports** – review access of individual reports by users and roles
4. **Manage Permissions** – adjust permissions for individual users
5. **View Users by Permission** – view users with access from each permission role
6. **Impersonate User** – test access for individual users

Manage Accounts

Use Manage Accounts to add local users, reset passwords for local accounts, edit user account information, manage organization access, etc.



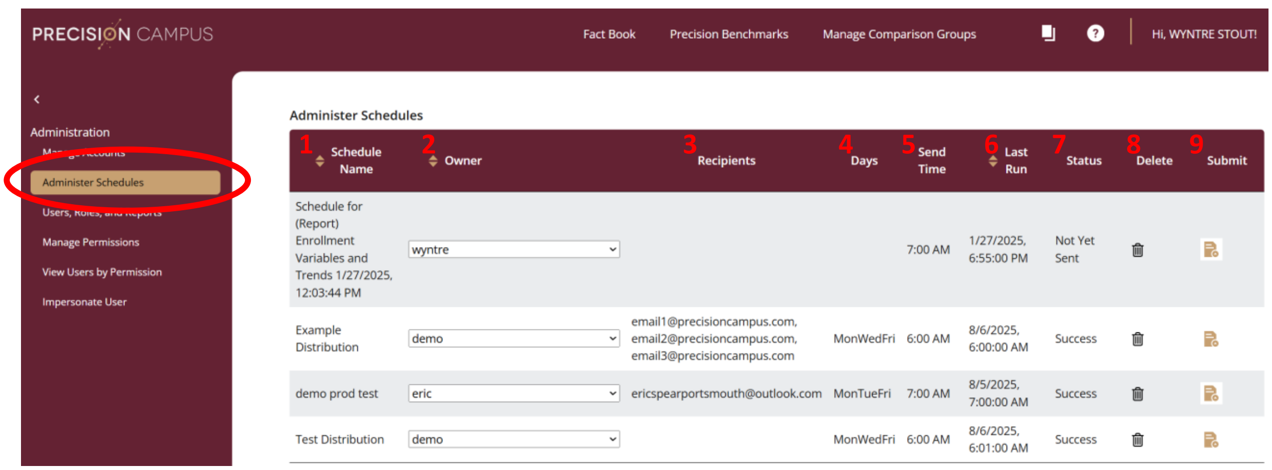
1. **Search** – start typing a user's name to locate their account; click Username to edit account information
2. **Username** – user's username
3. **Full name** –user's first and last name
4. **Active** – selected for active users; deselect to deactivate a user's account

5. **Portal User** – portal users use SSO to log in as long as no password is set for them
6. **Delete** – click to delete user's account
7. **Password** – enter a password to set/reset user's password
8. **Org Depth** – enter the maximum organization depth level accessible to the user, ranging from 2 to 7 (most granular, e.g., sections)
9. **Unit Access** – use Organization tree selections to limit user's access to specific units
10. **Create/Update User** – select to create a new user or update an existing user's information

See **Example Actions: Update a User's Local Access Credentials** for additional information.

Administer Schedules

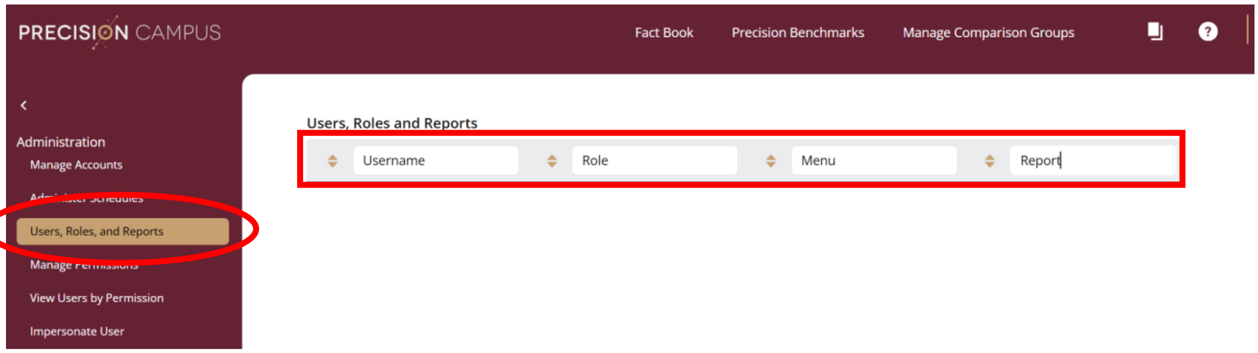
Review and manage distributions scheduled by other users in Administer Schedules, including reassigning owners, deleting, and running scheduled distributions.



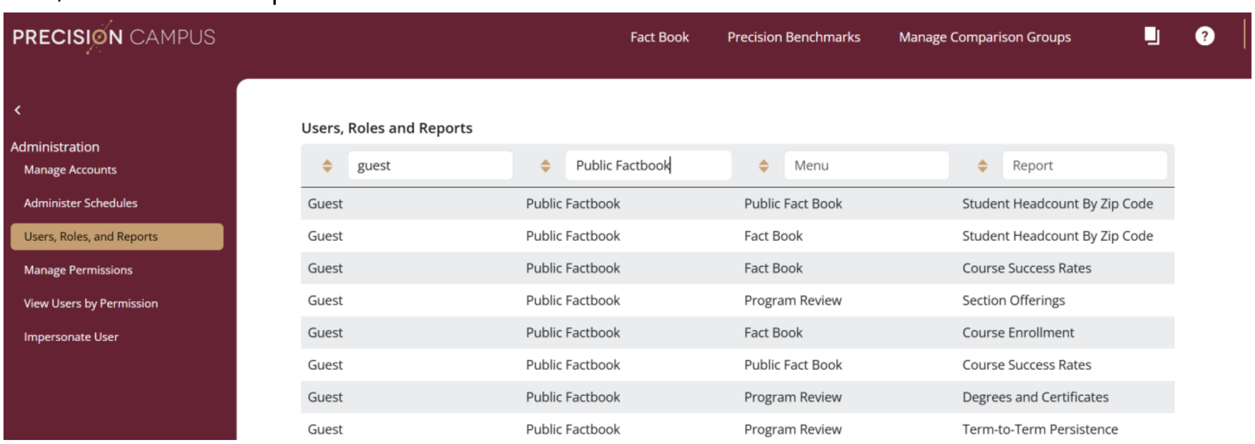
1. **Schedule Name** – name of scheduled distribution
2. **Owner** – user who owns the scheduled distribution; select drop-down to reassign to another user
3. **Recipients** – email addresses of recipients
4. **Days** – days of the week that the distribution goes out
5. **Send Time** – time of day the distribution goes out
6. **Last Run** – date/time that the distribution was last completed
7. **Status** – status of distribution (e.g., not yet sent, successfully sent)
8. **Delete** – select to delete distribution
9. **Submit** – select to run distribution

Users, Roles, and Reports

Use the Username, Role, Menu, and Report boxes at the top of this view to filter and review these attributes (e.g., see the reports visible in a role or menu, users who have access to a specific report, etc.).

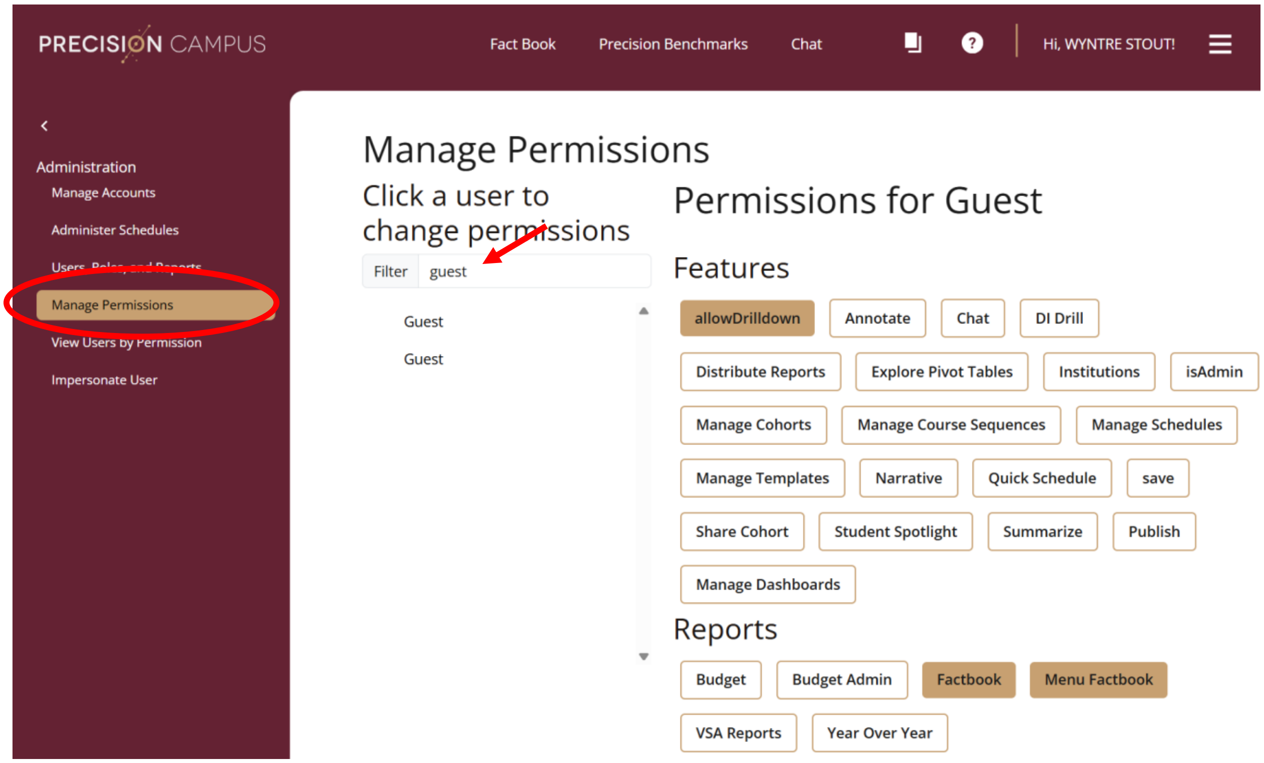


Pro tip: view reports. Filter to a specific user and role to see the reports available in that role, as in the example below.



Manage Permissions

Use Manage Permissions to manage the Feature and Report permissions for each user. To update permissions, start typing a user's name and select their name once it appears in the list below. Click any Feature or Report permission to enable (gold fill) or disable (white fill) it for the user.



In the example above, the allowDrilldown feature and the Factbook and Menu Factbook are enabled for the Guest user.

Features permissions descriptions (expands as additional features are developed):

- **AllowDrilldown** –access list of individual students within reports
- **Annotate** – comment on reports
- **Chat** – feature in development
- **DI Drill** – access lists of individual students within DI reports
- **Distribute Reports** – send reports to instructors filtered to data from their courses
- **Explore Pivot Tables** – add new columns to pivot reports
- **Institutions** – create peer groups for Precision Benchmarks
- **isAdmin** – admin privileges, including access to admin tool
- **Manage Cohorts** – create and manage student cohorts
- **Manage Course Sequences** – feature to be sunsetted
- **Manage Schedules** – schedule distribution of reports
- **Manage Templates** – create and manage program review templates

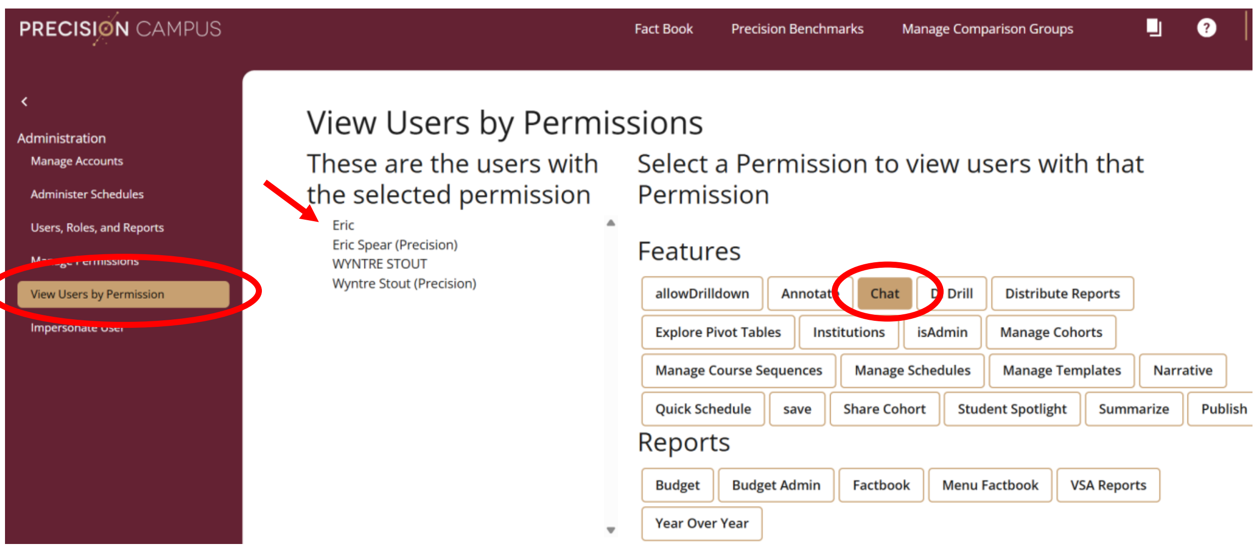
- **Narrative** – enter narrative info in templates (e.g., faculty completing program review)
- **Quick Schedule** – feature to be sunsetted
- **Save** – save reports and share with other users
- **Share Cohort** – share cohorts with other users
- **Student Spotlight** – access Student Spotlight with info for individual students
- **Summarize** – view narrative summary of report generated by AI
- **Publish** – publish reports to website to generate links to be embedded elsewhere
- **Manage Dashboards** – create, edit, and share dashboards

Report permissions depend on institution configuration.

Pro tip: default new user access. The permissions for the user "guest" are the default permissions assigned to any new users connecting through SSO.

View Users by Permission

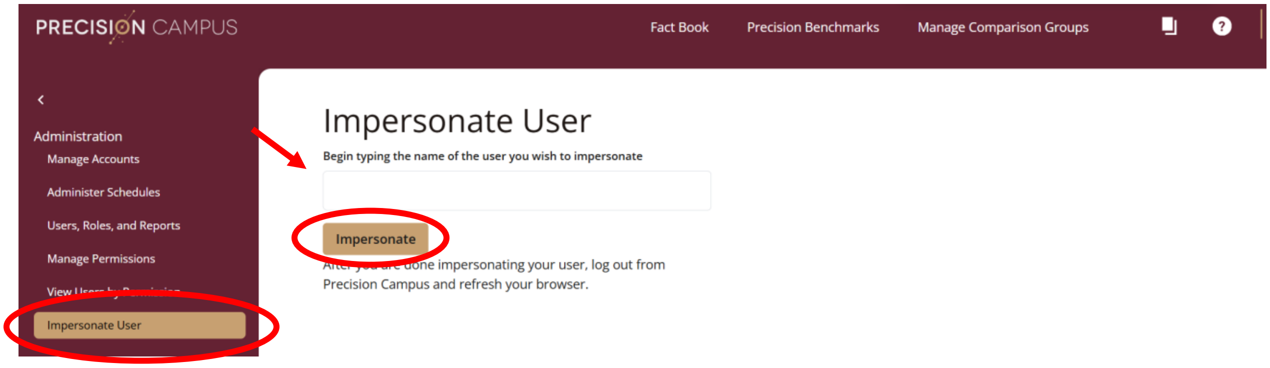
Use View Users by Permission to select a Feature or Reports permission and view the users who have that permission.



In the example above, user accounts for Eric and Wyntre are the only ones with access to the Chat feature.

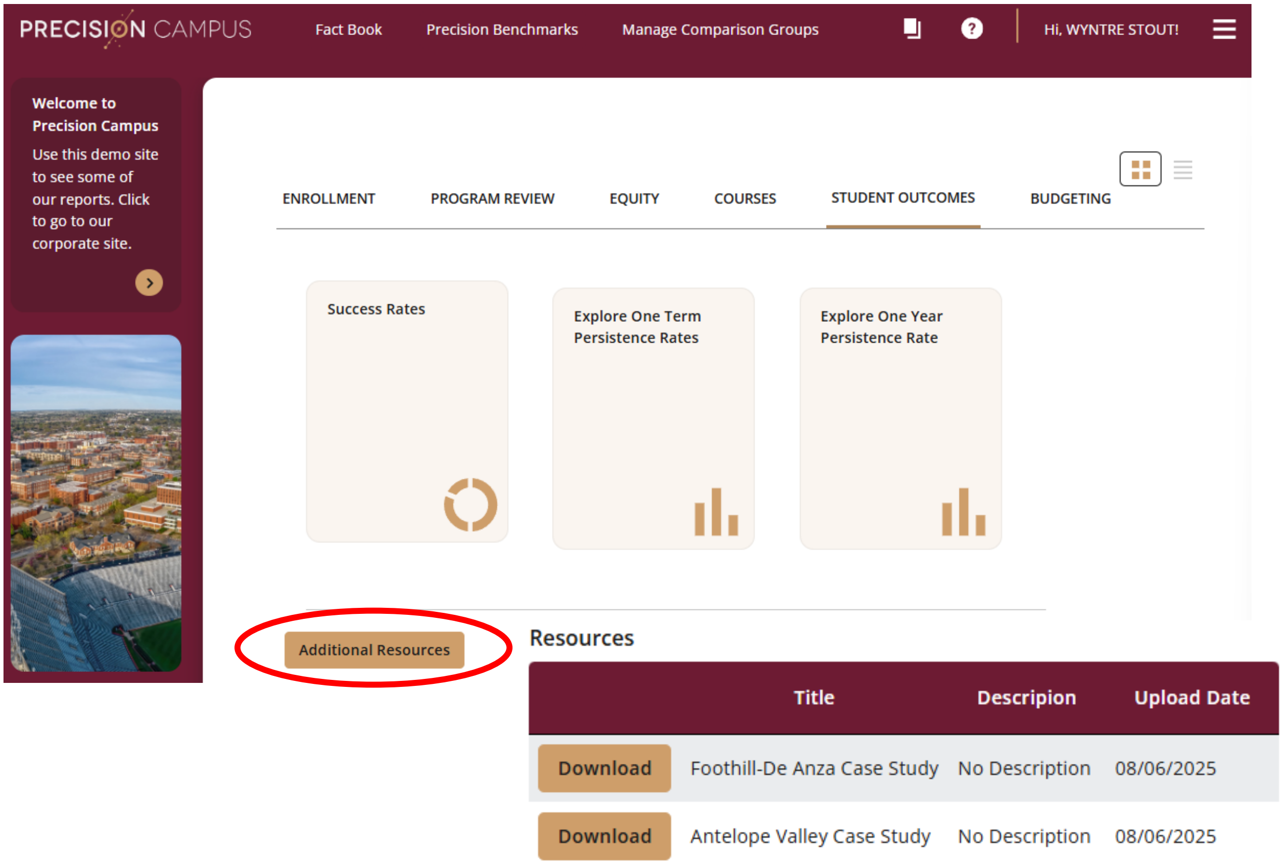
Impersonate User

Use Impersonate to view the site as it appears to a specific user, typically to confirm their access/permissions. To impersonate, enter a user's name and select **Impersonate**. To end impersonation, log out and refresh your browser.

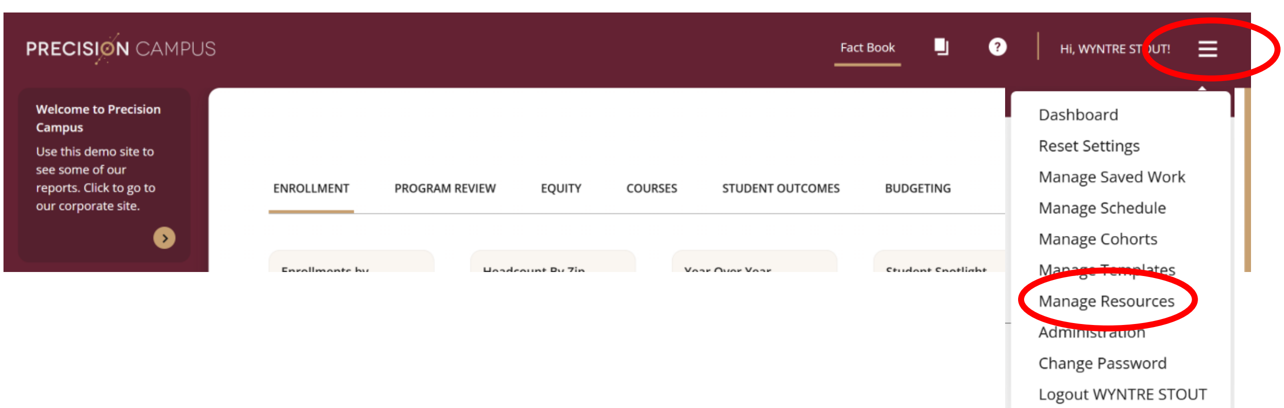


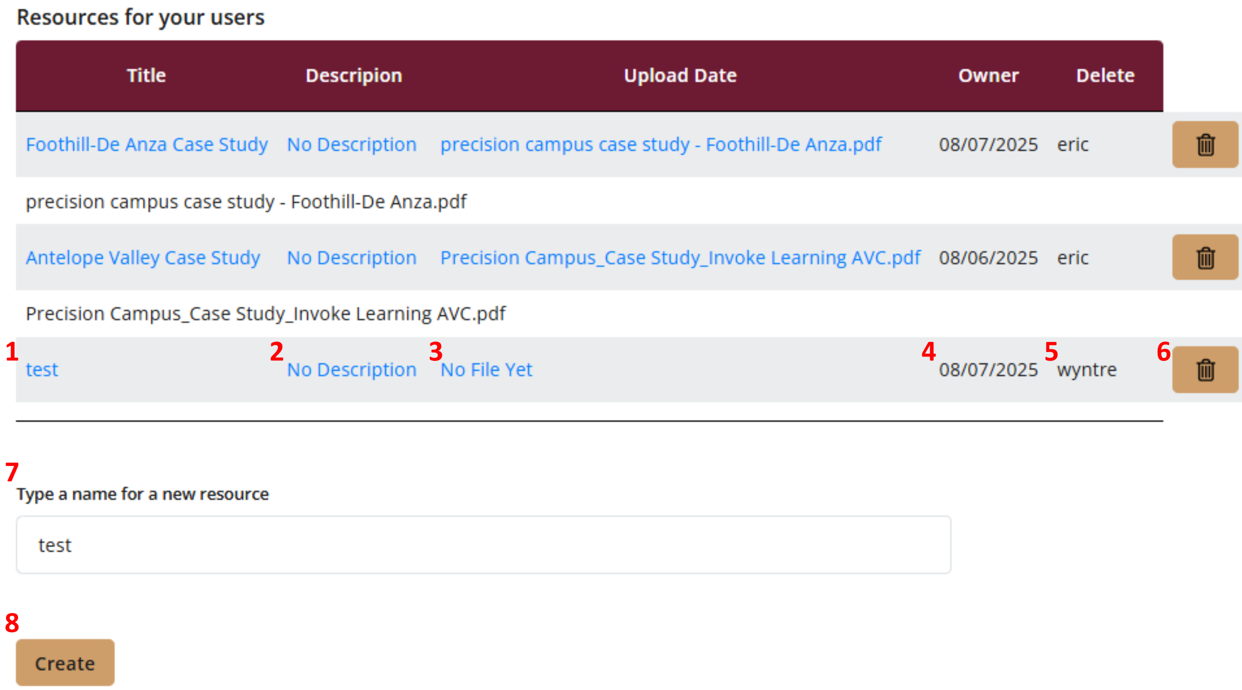
Manage Resources

Documents can be made available behind an **Additional Resources** button that appears at the bottom of menu pages. Formats accepted include PDF, Word/Excel, and text files.



To edit these documents, navigate to **Manage Resources** menu.





1. Document title
2. Document description
3. File name
4. Date added
5. Owner
6. Delete
7. Name for a new resource
8. **Create** button to add new resource

Click the blue text edit.

ADMIN TOOL

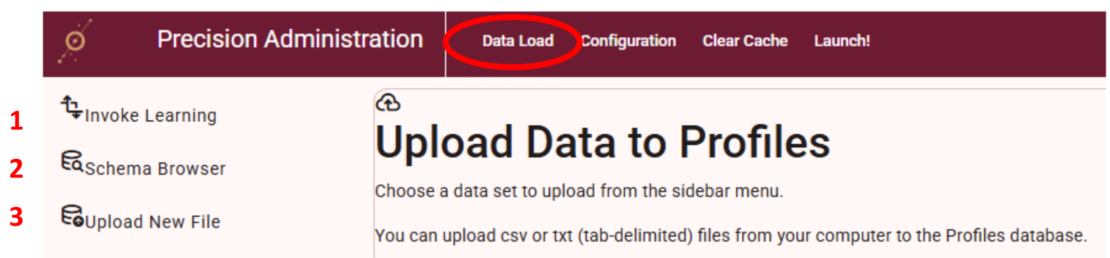
The majority of admin actions take place within the admin tool. To access the admin tool visit https://admin.precisioncampus.com/login and enter the following:

- Institution Database = schoolname _dev (no caps/spaces, name may be acronym)
- Local username and password (do not use SSO)
- Authenticator code from authenticator app on phone (for initial setup, scan QR code from app)

- **Data Load** – manually upload new data and review data tables/views
- **Configuration** – adjust settings for filters, reports, etc.
- **Clear Cache** – force cache to clear so any admin changes will become visible
- **Launch!** – opens a new window to view current site with any new changes

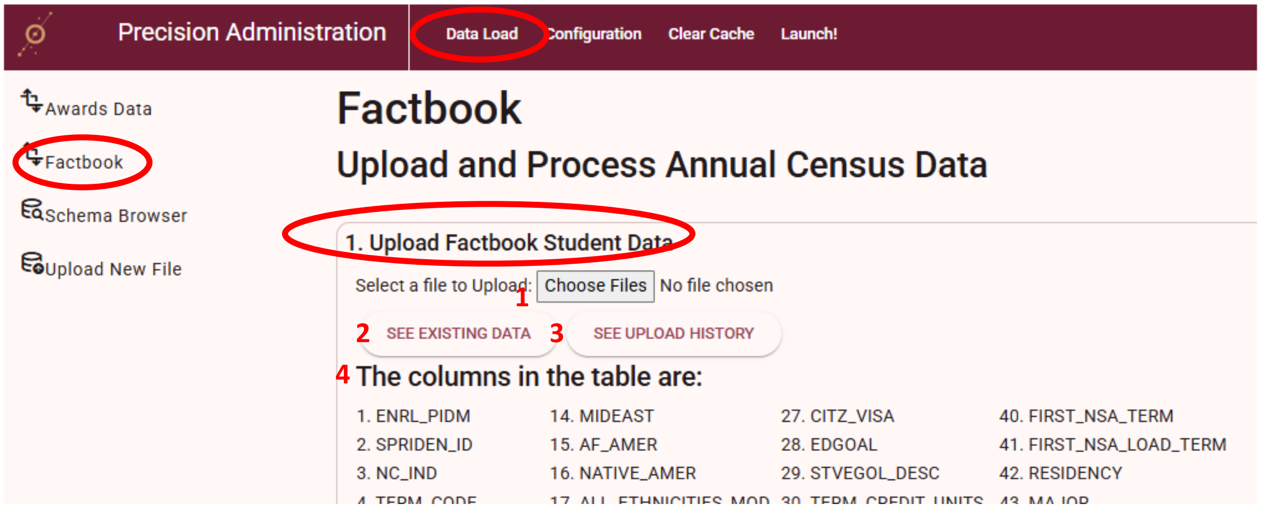
After changes are made and saved via pages in the **Data Load** or **Configuration** menus, select **Launch!** or select **Clear Cache** then refresh your browser to review the impact of the changes.

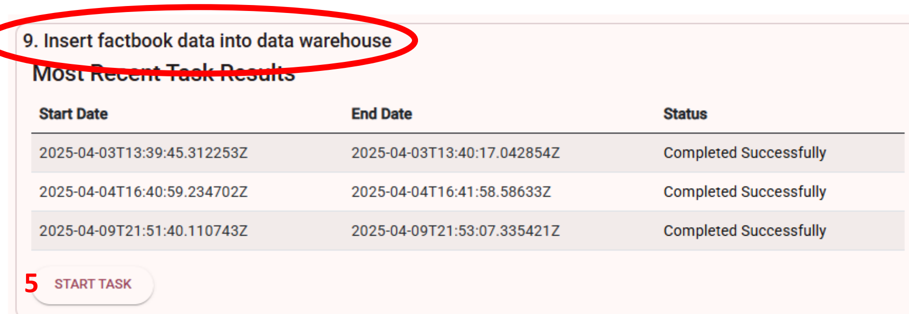
Data Load



1. **Various Data Loads** – depending on your institution's data, options to upload various data files will appear here
2. **Data Validation** – validation checks for uploaded data
3. **Schema Browser** – allows review of the data tables available in Precision Campus, including viewing the columns and a sample of data within each table
4. **Upload New File** – use this page to upload any csv file to Precision Campus that is outside of the routine data uploads submitted by your institution

Upload Data





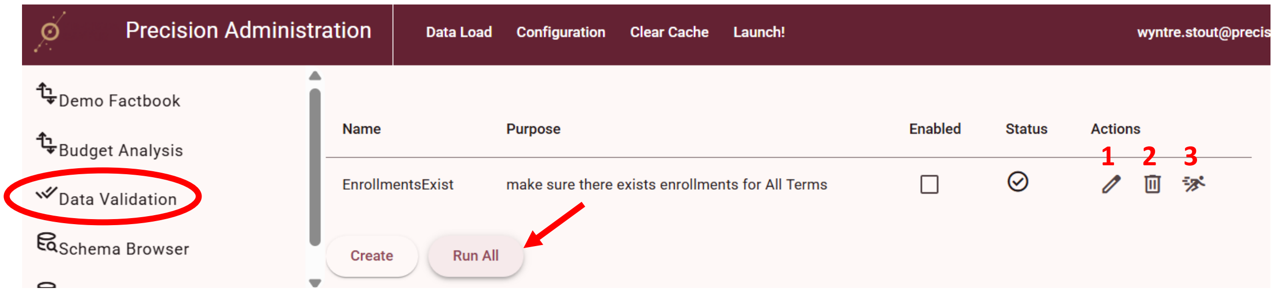
1. **Choose Files** – select flat file to upload (must be txt or csv format)
2. **See Existing Data** – preview data already in the data table
3. **See Upload History** – view status and timestamp of previous uploads
4. **The columns in the table are** – data files must include the columns as listed here (column name and order should match)
5. **Start Task for inserting data into data warehouse** – initiates the process to move uploaded data into the data warehouse

See **Example Actions: Uploading Data Files** for additional information.

NOTE: Data upload is dependent on **column order/number**, *not* column name. Columns in the data file to be uploaded must be in the same order as specified in the admin tool.

Data Validation

Data validation checks can be created to assist in identifying issues in uploaded data.

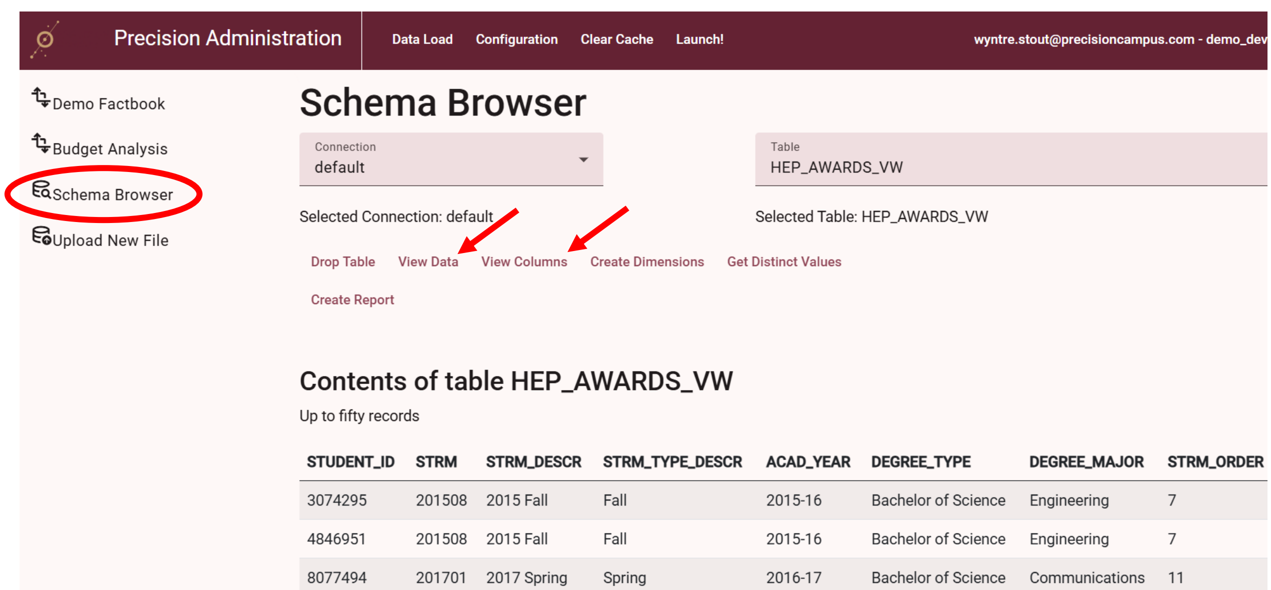


1. Edit using the pencil icon: edit/view underlying query and get query to show examples of validation problem
2. Delete using the trashcan icon
3. Run individual validation using the run icon or select **Run All** to run all data checks

Validation checks will show a check mark for pass, x for fail.

Schema Browser

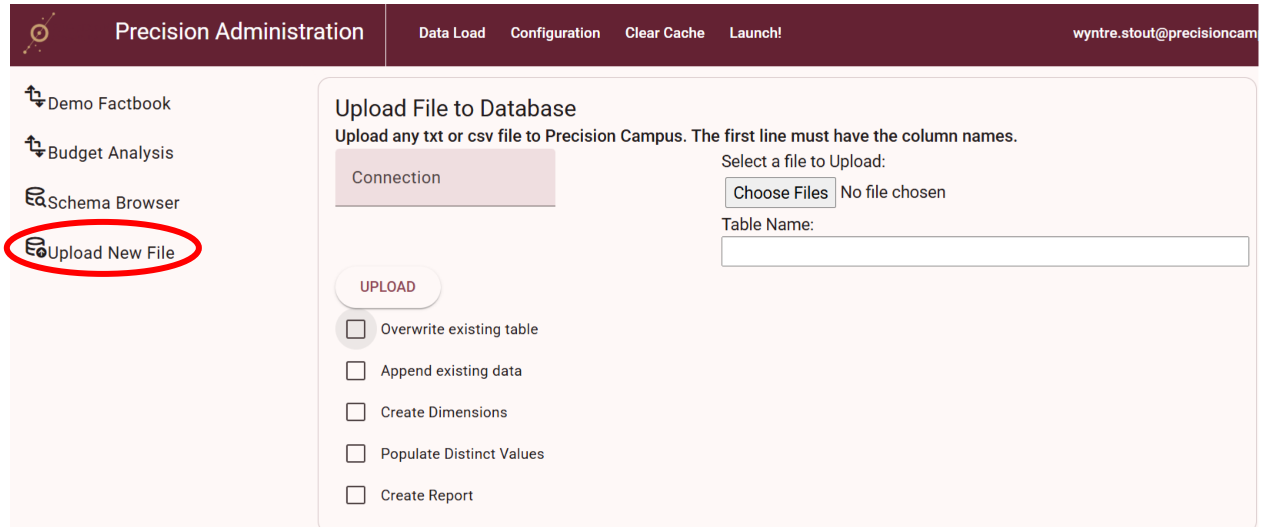
Use the schema browser to review data available in the Precision Campus views. Select **View Columns** to view the list of columns or **View Data** to view a sample of the data.



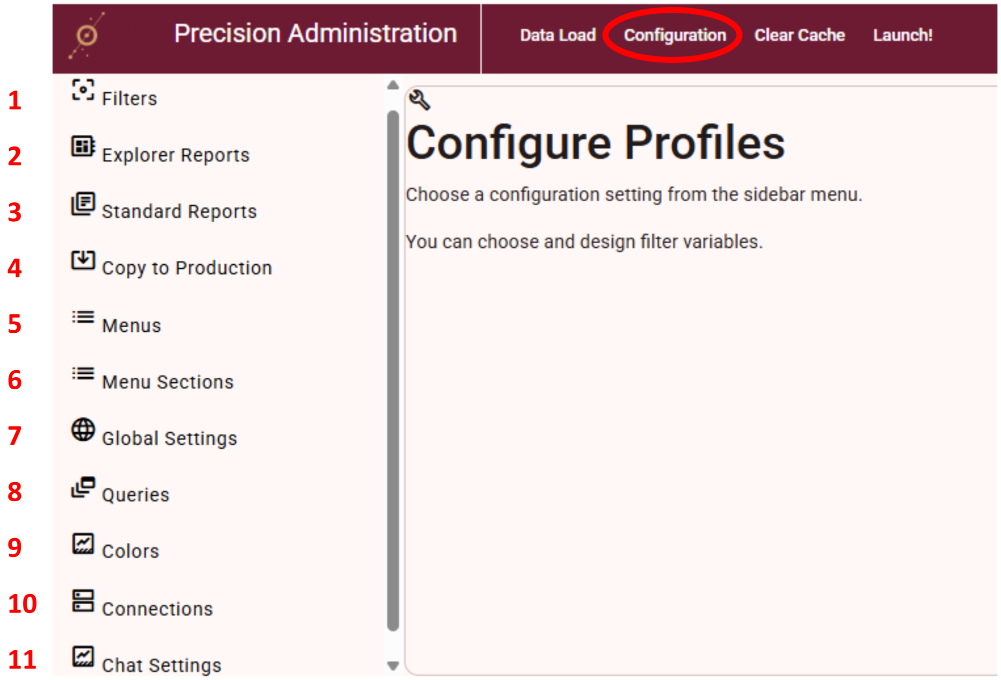
Pro tip: raw data. Tables with RAW_ prefix contain the raw data uploaded before any additional processing carried out by Precision in preparation for reporting.

Upload New File

Data files that are outside of the main data loads can be uploaded here for use in custom reports. Examples include survey data and strategic planning progress tracking.

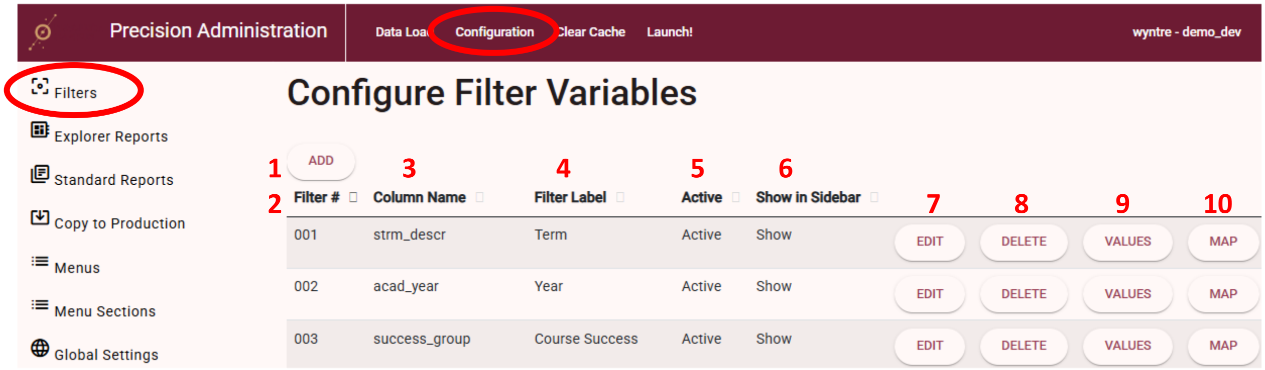


Configuration



1. **Filters** – create and configure the variables used as filters in reports
2. **Explorer Reports** – create and configure explorer reports which allow extensive interaction with report structure (URL suffix of "pivot?page=" and the report's number)
3. **Standard Reports** – create and configure standard reports which have a more fixed structure (URL suffix of "menuId=" with "M" and the report's number)
4. **Copy to Production** – move setting configuration of menus, reports, filters from dev to prod environment
5. **Menus** – create and configure menus, including adding and arranging reports within them
6. **Menu Sections** – create and configure new menu sections
7. **Global Settings** – adjust high-level settings that are exempt from copy to production
8. **Queries** – create and edit the data queries for standard reports
9. **Colors** – set custom color palettes for charts
10. **Connections** – provide connection settings for data warehouses accessible by Precision Campus
11. **Chat Settings** – feature coming soon, ignore for now

Filters



1. **Add** – create and configure a new filter variable (see below)
2. **Filter #** – unique number assigned to each filter
3. **Column Name** – name of the filter's column in the data source
4. **Filter Label** – label of the filter as displayed in reports
5. **Active** – designates active vs. inactive (not displayed) filters
6. **Show in Sidebar** – indicates whether filter appears in main list or behind the "More…" button in reports
7. **Edit** – configure existing filter variables (see below)
8. **Delete** – remove filter (cannot be undone)
9. **Values** – view, order, and refresh the dimension values for a filter
10. **Map** – view and select all the reports that a filter appears in as well as copy mappings from another variable

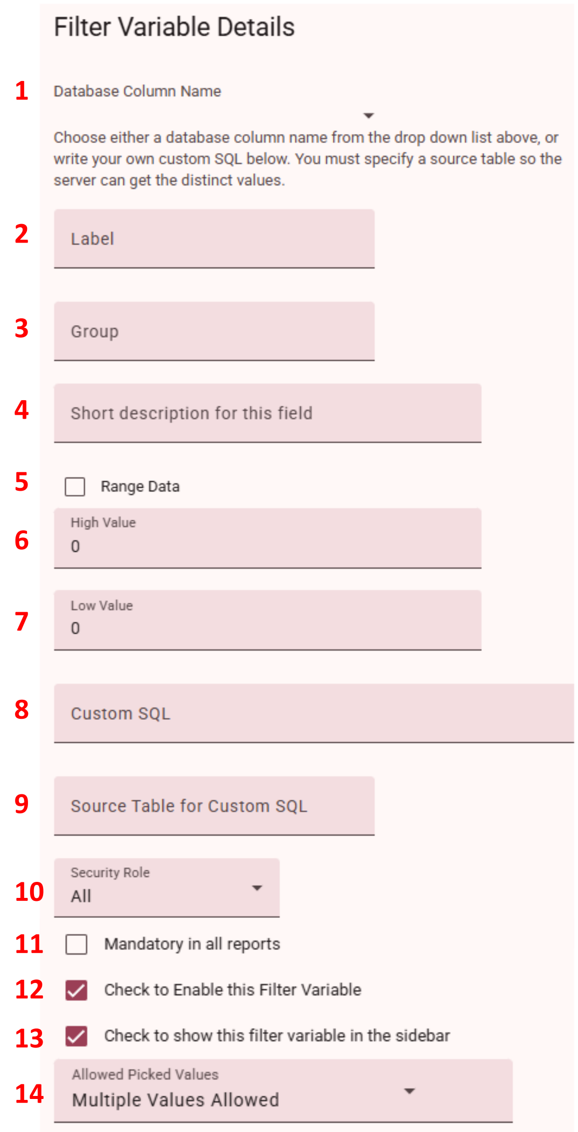
Pro tip: missing filter values. If a filter isn't showing an expected value in a report, it's likely because the filter's values need to be refreshed to bring in new values from the data (Configuration > Filters > Values > Refresh).

Pro tip: order of filter values. If the order of the values in a filter is off even though they are in the correct order in the Values view, force a reset of the order by moving one value up/down, selecting Close, then going back into Values to correct the order.

See **Example Actions: Change Display of Filters**, **Example Actions: Restricting Access to Filters**, **Example Actions: Change the Default Term Displayed in a Report**, and **Example Actions: Change the Default Number of Years Displayed in a Report** for additional information.

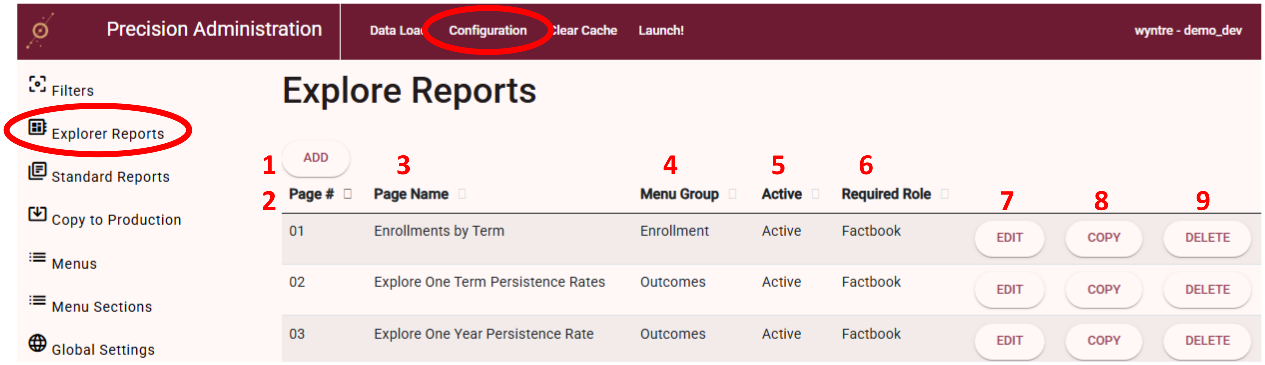
Configuring Variables

1. **Database Column Name** – name of the filter's column in the data source
2. **Label** – label of the filter as displayed in reports
3. **Group** – group header under which filter will appear in reports
4. **Description** – narrative describing filter variable
5. **Range Data** – enable slider for range of values
6. **High Value** – max value of slider
7. **Low Value** – min value of slider
8. **Custom SQL** – SQL for a derived filter
9. **Source Table for Custom SQL** – table referenced for custom SQL
10. **Security Role** – set required security role to view filter
11. **Mandatory in all reports** – no longer used, to be removed
12. **Enable filter** – make filter active
13. **Show filter in sidebar** – show filter in main list of reports; if not selected, filter will appear behind the "More…" button
14. **Allowed Picked Values** – designate whether multiple or single values are allowed



Explorer Reports

Explorer reports allow extensive interaction with report structure. From the main site, they can be identified by their URL suffix of "pivot?page=" and the report's number.

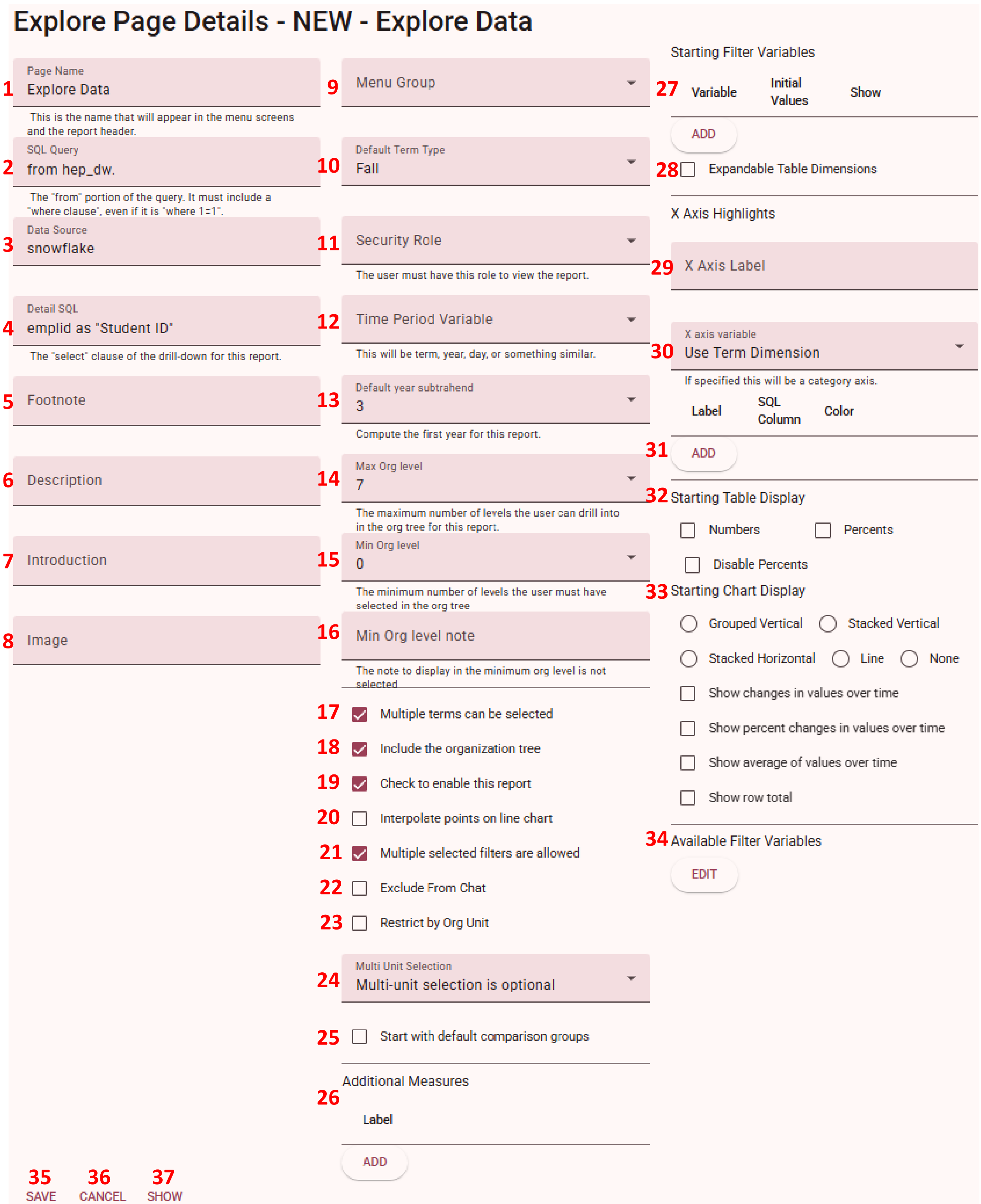


1. **Add** – create and configure a new report (see below)
2. **Page #** – unique number assigned to each report
3. **Page Name** – name of the report
4. **Menu Group** – menu group that report appears in
5. **Active** – designates active vs. inactive (not displayed) reports
6. **Required Role** – indicates the security role the report is assigned to
7. **Edit** – configure existing report (see below)
8. **Copy** – create a copy of the report
9. **Delete** – remove report (cannot be undone)

Pro tip: viewing reports. By default, reports are sorted by number. Click on Page Name, Menu Group, Active, or Required Role to sort reports by these attributes.

Pro tip: creating reports. Typically, it is easier to copy an existing report and edit it instead of creating a new report from scratch.

Configuring Explorer Reports



1. **Page Name** – name of the report
2. **SQL Query** – SQL from statement to identify data table/view for the report (must include a "where" clause even if it is "where 1=1"
3. **Data Source** – database (leave as default snowflake), or a named connection (defined in the **Connections** tab)
4. **Detail SQL** – SQL for data drill-down
5. **Footnote** –footnotes to appear at the bottom of the report
6. **Description –** short description of the report that shows up in the menu either as a tooltip in the card view or adjacent to the report name in the list view.
7. **Introduction** – introduction to appear at the top of the report
8. **Image –** set image for preview card displayed in menu
9. **Menu Group –** menu group that report appears in
10. **Default Term Type** – select term to be used (should align with x axis variable specified below; e.g., Fall when the report is by term, Year if the report is by year
11. **Security Role** – indicates the security role the report is assigned to
12. **Time Period Variable** – select term to be used (should align with x axis variable; e.g., Fall when the report is by term, Year if the report is by year)
13. **Default Year Subtrahend** – define the number of years included in the report relative to the **Most Recent Year** set in **Global Settings** (see Note below)
14. **Max Org Level –** set the deepest org tree levels accessible in report
15. **Min Org Level** – set the minimum org tree level required to view data in report
16. **Min Org level note** – note prompting users to select minimum org tree level
17. **Multiple terms can be selected** – select to allow multiple terms to be displayed
18. **Include the organization tree –** select to show org tree with report
19. **Enable this report** – select to enable report (report will not be visible on site if not selected)
20. **Interpolate points on line chart** – select to enable fill in gaps between data points in the line chart
21. **Multiple selected filters are allowed** – select to allow user to utilize multiple filters
22. **Exclude from Chat** – exclude report from AI Chat corpus
23. **Restrict by org unit** – select to only allow users to access units they are permitted to see
24. **Multi-Unit selection** – specify if selection of multiple units should always be enabled, optionally enabled, or disabled altogether
25. **Start with default comparison groups –** used for comparisons in benchmarking reports
26. **Additional Measures** – add, order, delete, and edit the report's measures
27. **Starting filter variables** – set variables to be highlighted or act as filter selections when the report opens (see NOTE below)

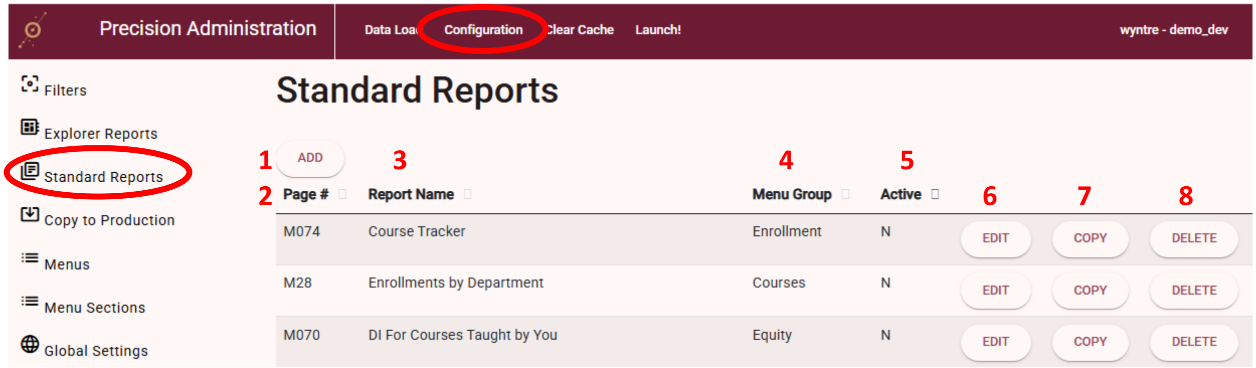
28. **Expandable Table Dimensions** – select to collapse all disaggregated values in table until the user selects them
29. **X Axis Label** – label displayed for X axis
30. **X Axis Variable** – define the variable used as the X axis
31. **Reference line** – add and configure vertical reference lines (e.g., term start, census date)
32. **Starting Table Display** – select the default values to be displayed in the table when the report opens
33. **Starting Chart Display** – specify the default chart to be displayed when the report opens
34. **Available filter variables** – select the filters that should appear for users to use to limit data displayed in the report
35. **Save** – save changes made and return to menu
36. **Cancel** – exit without saving changes
37. **Show** – show report with any changes in the main site

NOTE on default terms: Users can override default selections when interacting with the report filters. **Starting filter variables** supersede other default settings. Unless **Starting filter variables** are set, the **Default Year Subtrahend** will define the default number of years displayed in reference to the **Most Recent Year** set in **Global Settings**. A default year subtrahend of 1 would only display the Most Recent Year and a default year subtrahend of 5 would display data up to 5 years from the Most Recent Year. When new data are added and the Most Recent Year is changed, the default years displayed in reports will adjust accordingly.

See **Example Actions: Update a Report's Footnote** and **Change the Default Term Displayed in a Report** for additional information.

Standard Reports

Standard reports have a more fixed structure. From the main site, they can be identified by their URL suffix of “menuId=” with “M” and the report’s number.



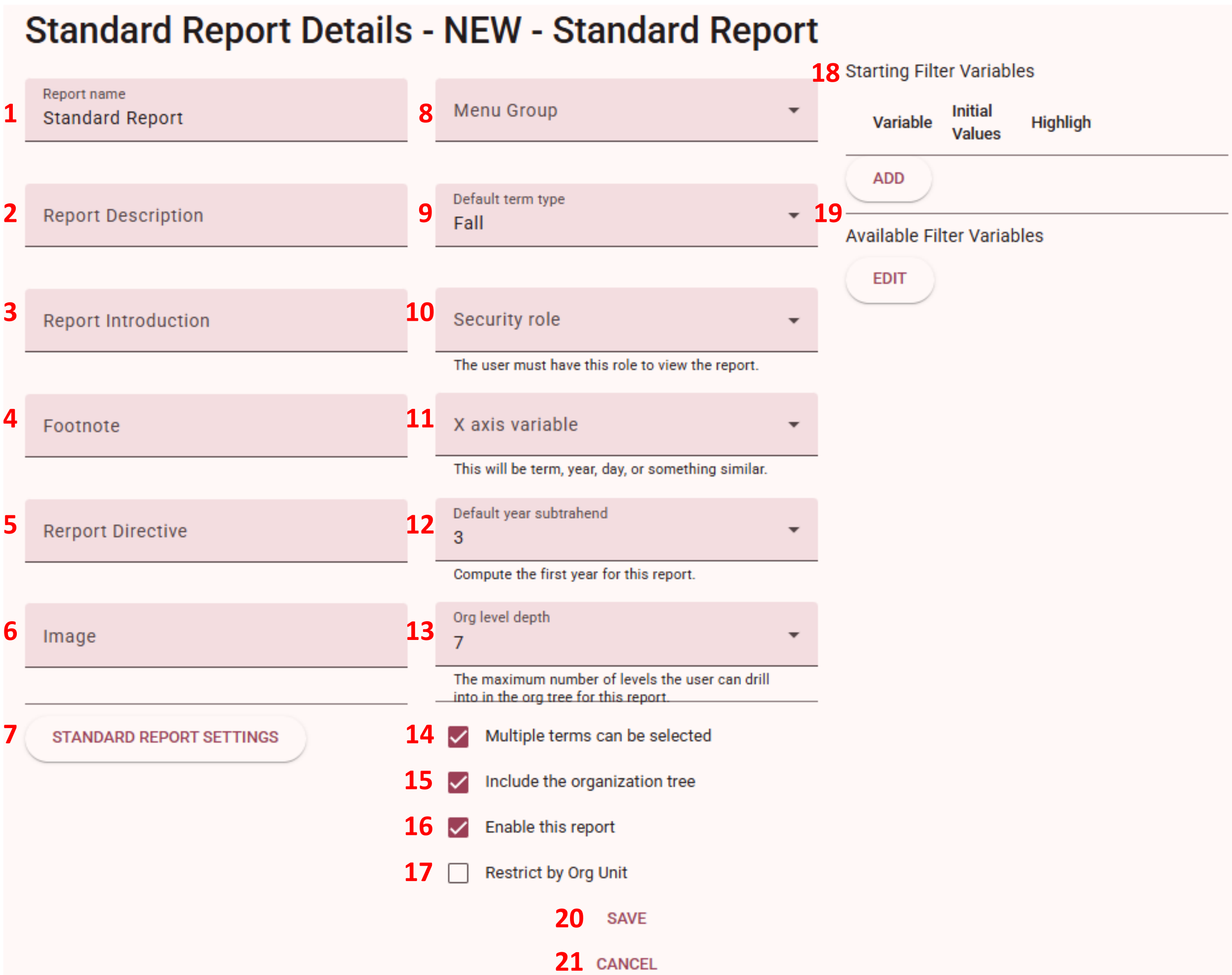
1. **Add** – create and configure a new report (see below)
2. **Page #** – unique number assigned to each report
3. **Report Name** – name of the report
4. **Menu Group** – menu group that report appears in
5. **Active** – designates active vs. inactive (not displayed) reports
6. **Edit** – configure existing report (see below)
7. **Copy** – create a copy of the report
8. **Delete** – remove report (cannot be undone)

Pro tip: viewing reports. By default, reports are sorted by number. Click on Page Name, Menu Group, or Active to sort reports by these attributes.

Pro tip: creating reports. Typically, it is easier to copy an existing report and edit it instead of creating a new report from scratch.

Configuring Standard Reports

The structure of standard reports is set using a report directive within the software and a data query that specifies the data to be used in the report. Additional settings can be configured here.



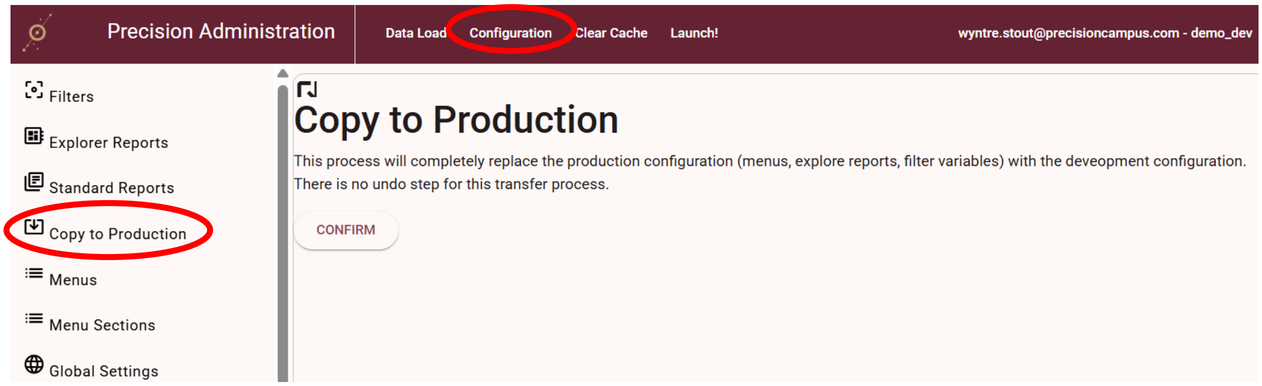
1. **Report Name** – name of the report
2. **Report Description** – short description of the report displayed in the menu (either as a tooltip in the card view or adjacent to the report name in the list view)
3. **Report Introduction** – introduction to appear at the top of the report
4. **Footnote** – footnotes to appear at the bottom of the report
5. **Report Directive** – name of query within the software that structures the report
6. **Image** – set image for preview card displayed in menu
7. **Report Settings** – the options in this menu depend on the report directive but usually include a place to specify the data query for the report
8. **Menu Group** – menu group that report appears in

9. **Default Term Type** – select term to be used (should align with x axis variable specified below; e.g., Fall when the report is by term, Year if the report is by year)
10. **Security Role** – indicates the security role the report is assigned to
11. **X Axis Variable** – define the variable used as the X axis
12. **Default Year Subtrahend** – defines the number of years included in the report relative to the current year (e.g., a subtrahend of 5 will display data available through 5 years from the current year)
13. **Org Level Depth** – set the max number of org tree levels that users can access
14. **Multiple terms can be selected** – select to allow multiple terms to be displayed
15. **Include the organization tree** – select to show org tree with report
16. **Enable this report** – select to enable report (report will not be visible on site if not selected)
17. **Restrict by org unit** – select to only allow users to access units they are permitted to see
18. **Starting filter variables** – set variables to be highlighted or act as filter selections when the report opens (note that users can override these selections when interacting with the report filters)
19. **Available filter variables** – select the filters that should appear for users to use to limit data displayed in the report
20. **Save** – save changes made and return to menu
21. **Cancel** – exit without saving changes

Pro tip: standard report directives. Often, the report directive has the same name as the data query but not always. If copying a standard report to use as a template for a new report, use the same report directive but create a new data query and specify it in the Report Settings menu.

Copy to Production

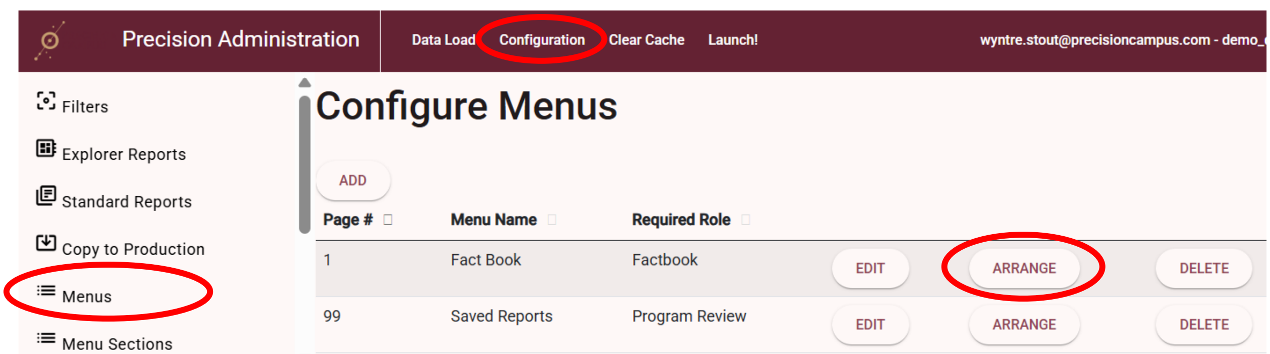
Use Copy to Production to move setting configuration of menus, reports, filters from dev to prod environment. Once run, this cannot be undone.



After clicking **Confirm**, a message will appear confirming transfer to production.

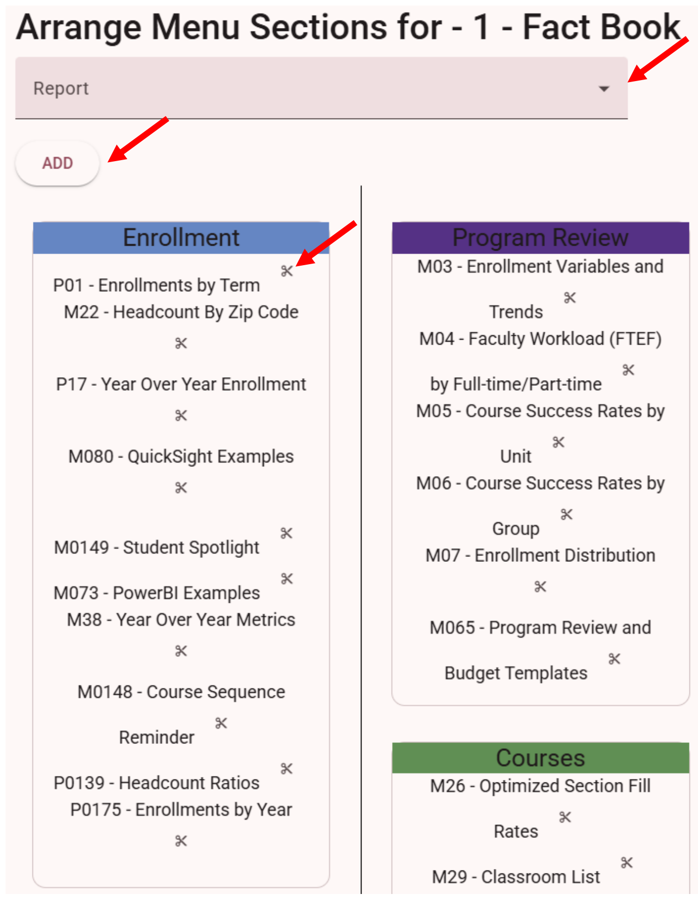
Menus

Configure menus and the reports that appear within them.



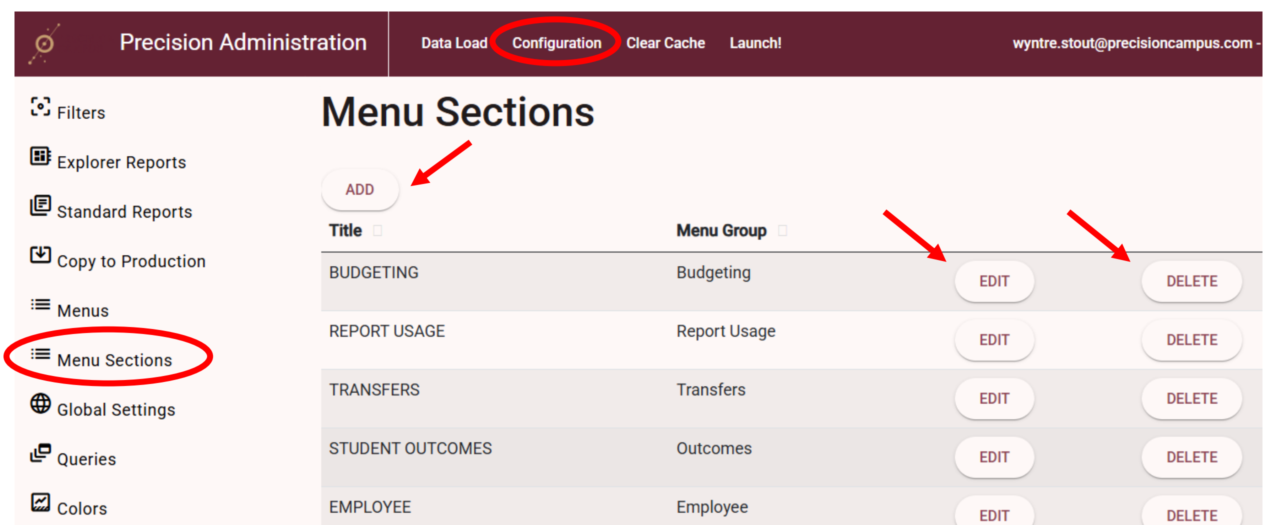
Configuring the reports within a menu:

- Select **Arrange** for the menu.
- Use the **Report** drop down to select a new report then click **Add** to add to a menu.
- Click and drag reports within a menu section to reorder them.
- Click the scissors icon to remove a report from a menu.



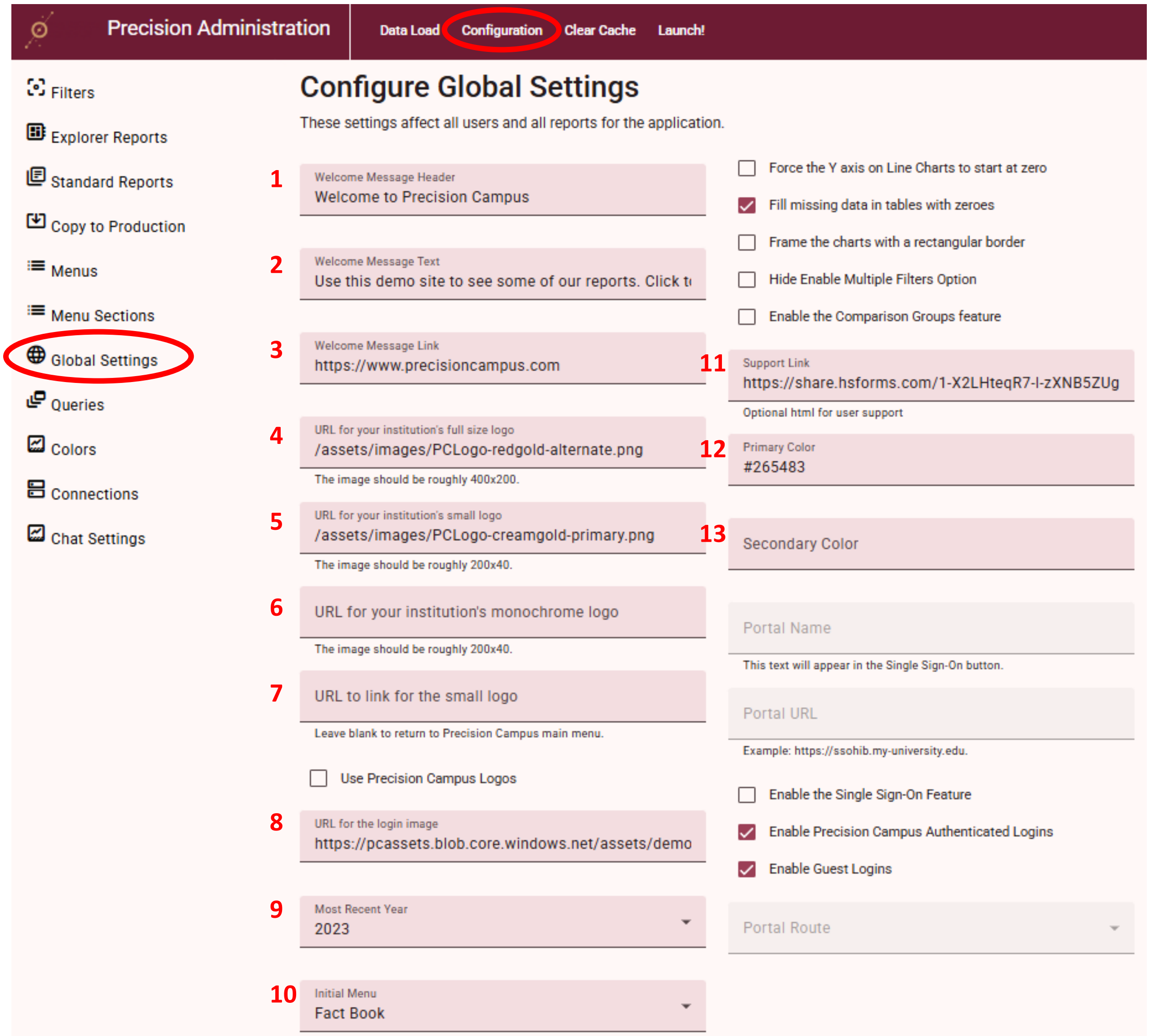
Menus Sections

Add, edit, and delete menu sections.



Global Settings

Global Settings are high-level settings that are **not copied to production** like most other configuration settings. To make changes to production, log into the prod instance in the admin tool (schoolname _prod). Most Global Settings are managed by Precision Campus staff. A few highlights are noted here.



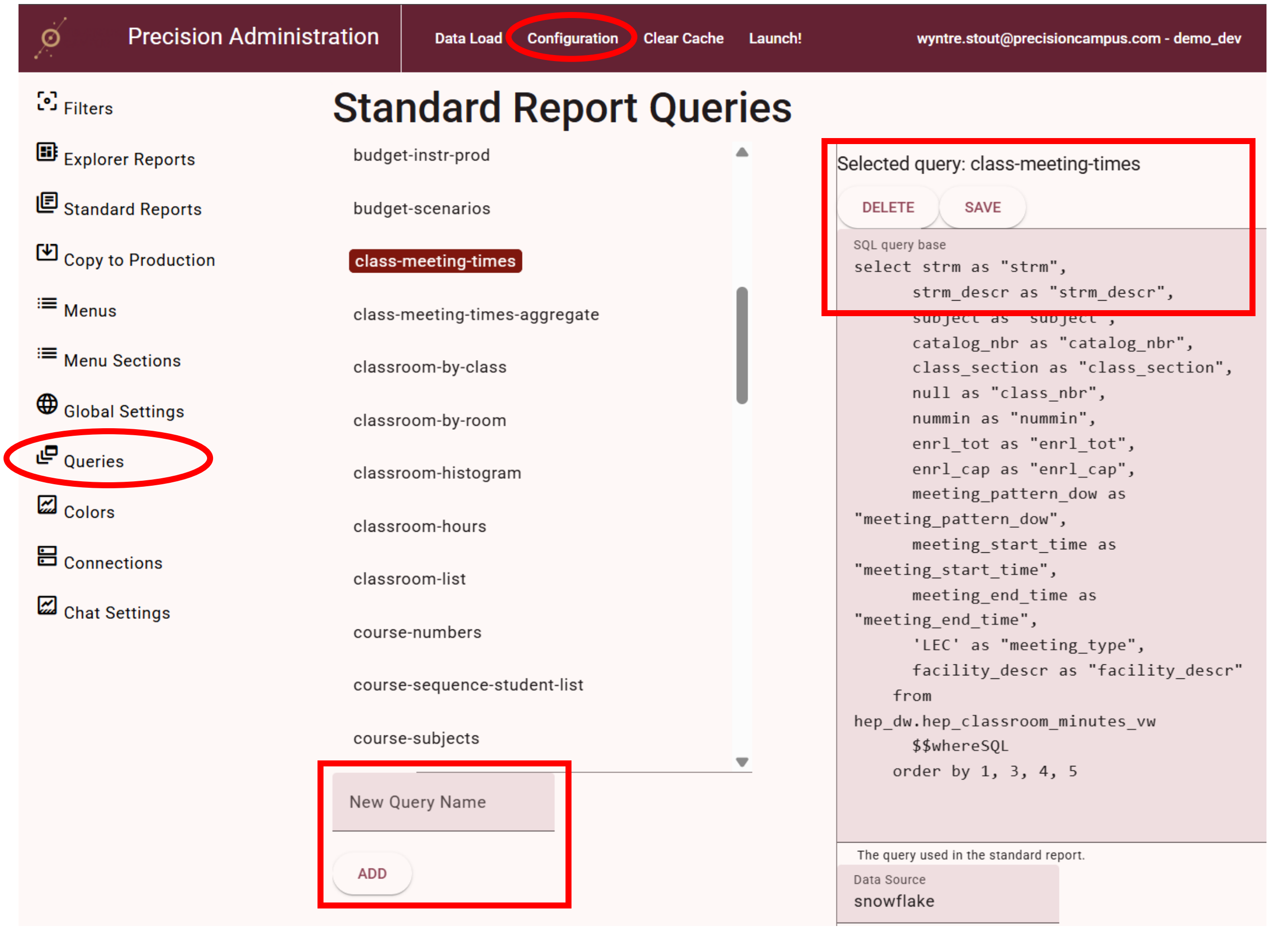
1. **Welcome Message Header** – header for welcome message at the top left of Precision
2. **Welcome Message Text** – text for welcome message
3. **Welcome Message Link** – link behind > button on welcome message
4. **URL for your institution's full size logo** – image of full size logo
5. **URL for your institution's small logo** – image of small log

6. **URL for your institution's monochrome logo** – image of monochrome logo
7. **URL for link for the small logo** – hyperlink for small logo, if desired
8. **URL for the login image** – image appearing on login page
9. **Most Recent Year** – most recent year of data currently available (see NOTE below)
10. **Initial Menu** – menu that initially displays upon logging into Precision
11. **Support Link** – link for users to request assistance
12. **Primary Color** – HEX code of secondary color (only applied in prod)
13. **Secondary Color** – HEX code of secondary color (only applied in prod)

NOTE: The **Most Recent Year** set in **Global Settings** is used as the reference point for the **Default Year Subtrahend**, the setting in report configuration that determines how many years of data are displayed in a report by default. A default year subtrahend of 1 would only display the Most Recent Year and a default year subtrahend of 5 would display data up to 5 years from the Most Recent Year. When new data are added and the Most Recent Year is changed, the default years displayed in reports will adjust accordingly.

Queries

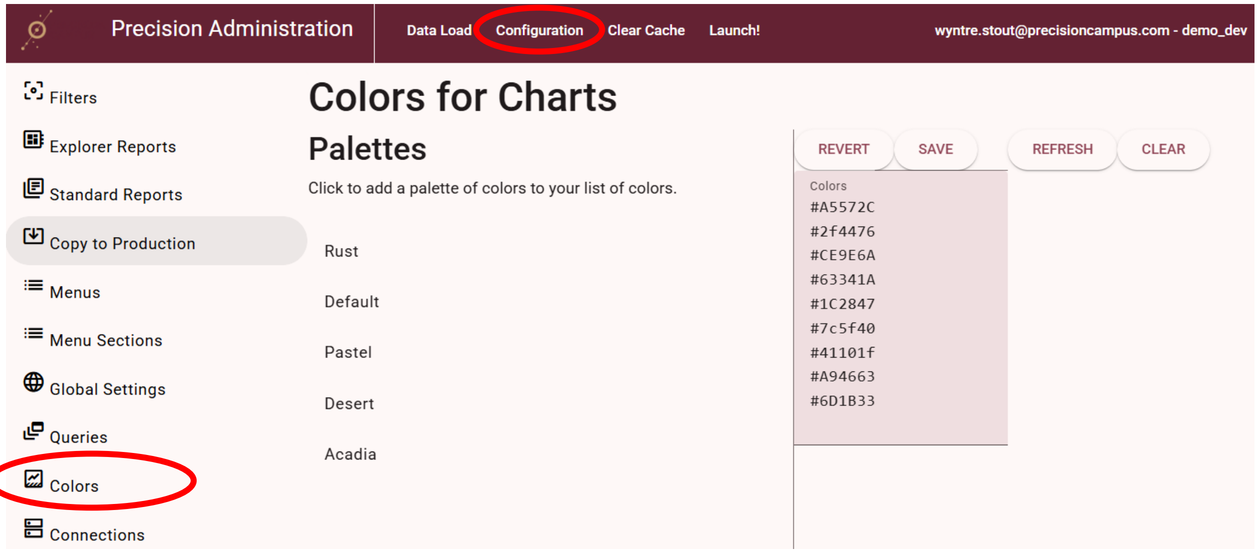
The data queries behind standard reports can be reviewed and edited here.



To edit an existing query, select the query from the list and make edits in the **SQL query base** box then select **Save**. To create a new query, enter its name in the New Query Name box and select **Add** then enter the query in the **SQL query base** box and select **Save**.

Colors

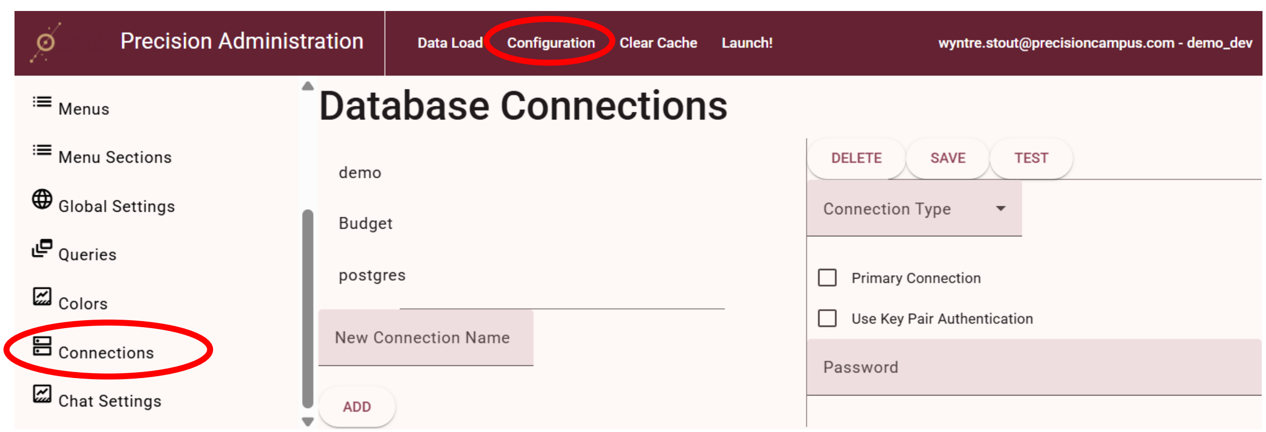
Configure colors palettes for charts in the Colors menu.



To create a custom color palette, replace the colors in the Default palette with the HEX code of the preferred colors then select **Save**.

Connections

Configure connections to the data warehouses accessible by Precision Campus. Contact Precision Campus for additional information.



Chat Settings

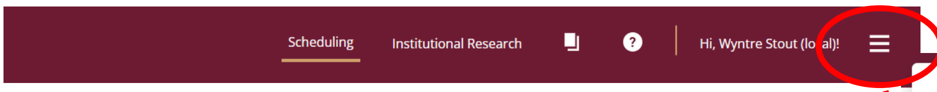
The Chat feature is in development. Contact Precision Campus for additional information.

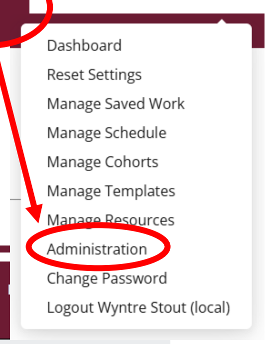
EXAMPLE ACTIONS: Step-by-Step Instructions

Update a User's Local Access Credentials

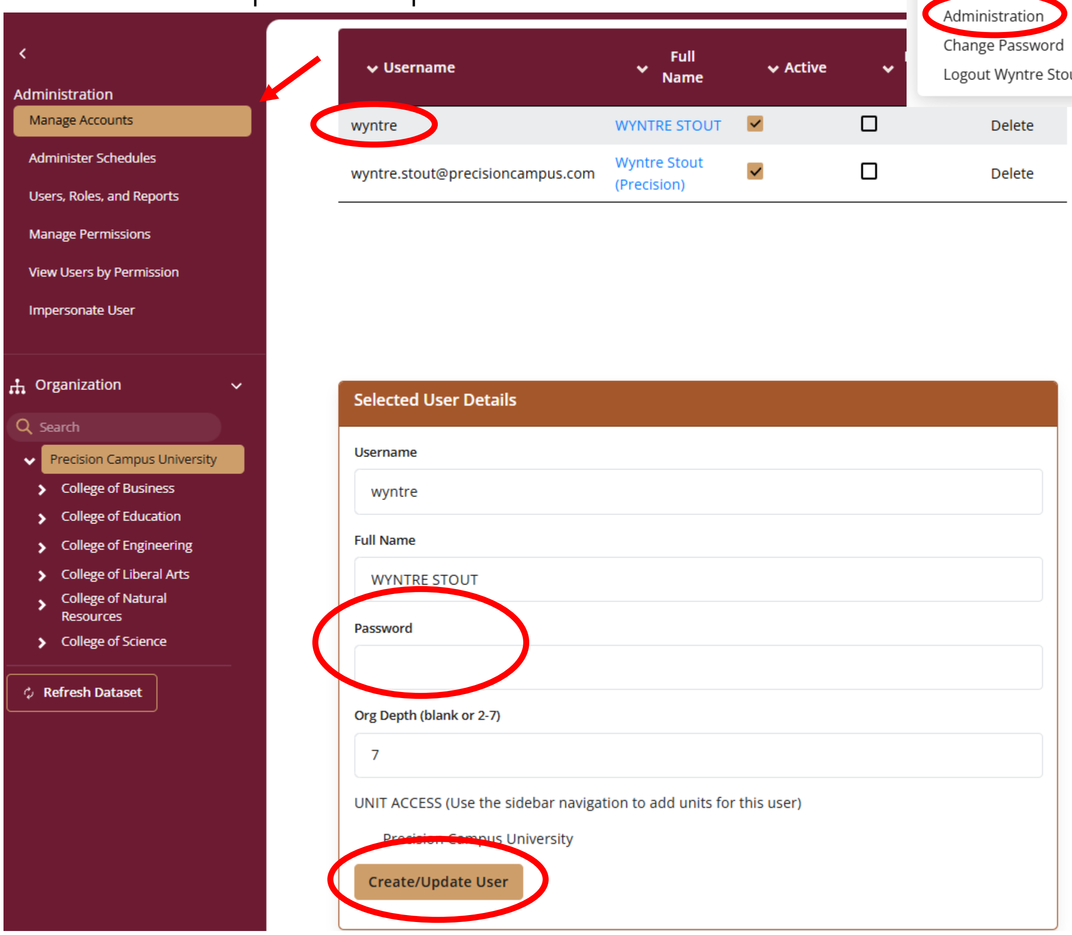
There are two types of users in Precision Campus. "Portal" users are maintained by the client college single sign on. "Local" users have usernames and passwords that are defined and maintained by the Precision Campus Administration page on the main development and production sites, as described below.

1. Navigate to Administration from dev or prod site





2. Under Manage Accounts, find and click user's name from the list of users and update their password

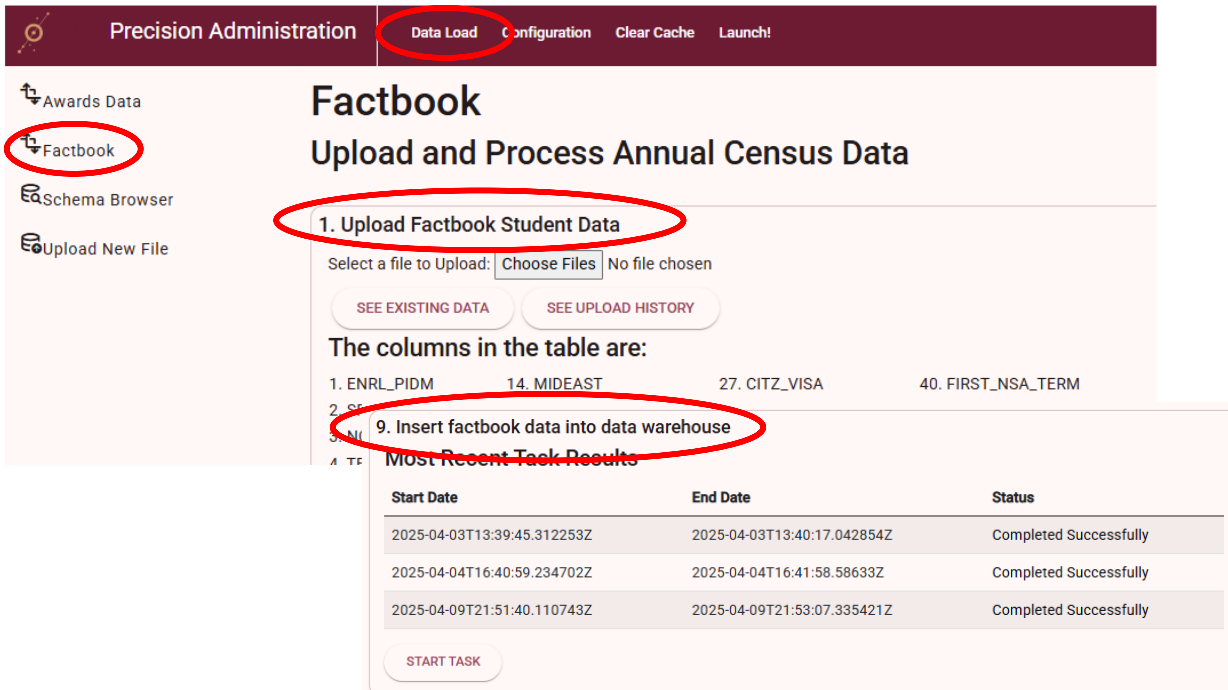


3. Click **Create/Update User**

Upload Data File

Data are uploaded in the Data Load menu in the admin tool for dev then moved to prod.

1. From **Data Load** menu, navigate to respective data load section and table.
2. Review the columns in the table to confirm the file matches or identify any changes.
3. Select **Choose File** to locate file and select **Upload** to load it.
4. Scroll to **Insert factbook data into data warehouse** and select **Start Task** to run.



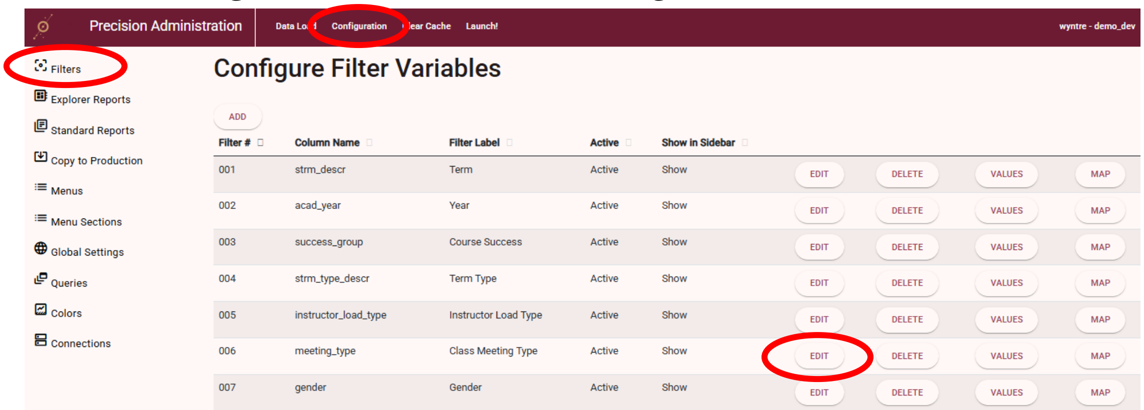
5. Select **Launch!** or **Clear Cache** and refresh browser to review new data on dev.
6. After confirming the newly uploaded data is reflected properly in the reports on dev, the data can be moved to production.
   a. If the table structures have not changed:
      i. Start the task **Push factbook data to production** (or a similar name).
      ii. One it is done, log into the admin portal for prod and run the **insert factbook data into data warehouse** step.
   b. If the table structures have changed: notify Precision Campus staff who will need to manage the movement of data to production.

NOTE: Data upload is dependent on **column order/number**, *not* column name. Columns in the data file to be uploaded must be in the same order as specified in the admin tool.

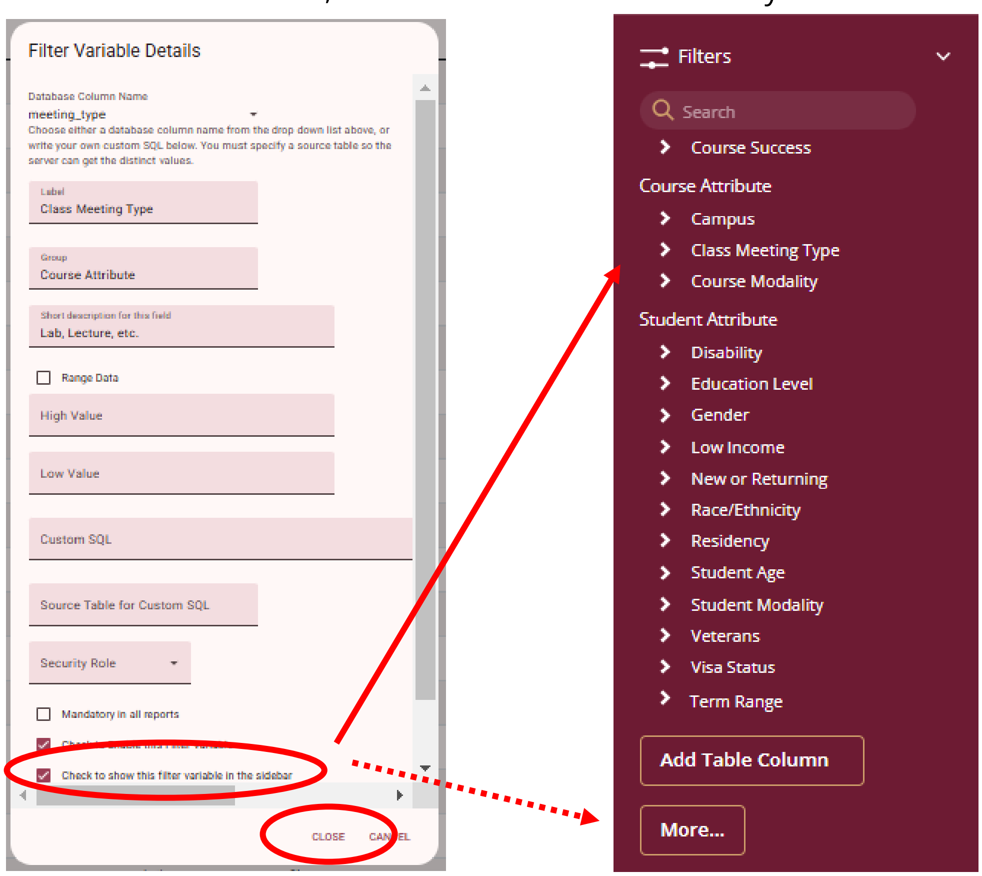
Change Display of Filters: Main List or Behind the “More…” Button

Adjustments to filters are completed in the admin tool for dev then moved to prod.

1. From **Configuration**, click **Filters** and navigate to filter’s record then select **Edit**.



2. Make selection for **Check to show this filter variable in the sidebar** and click **Close**:
   a. If selected, the filter will be included in the main list of filters displayed in reports
   b. If unselected, the filter will be hidden and only accessible under the “More…” list

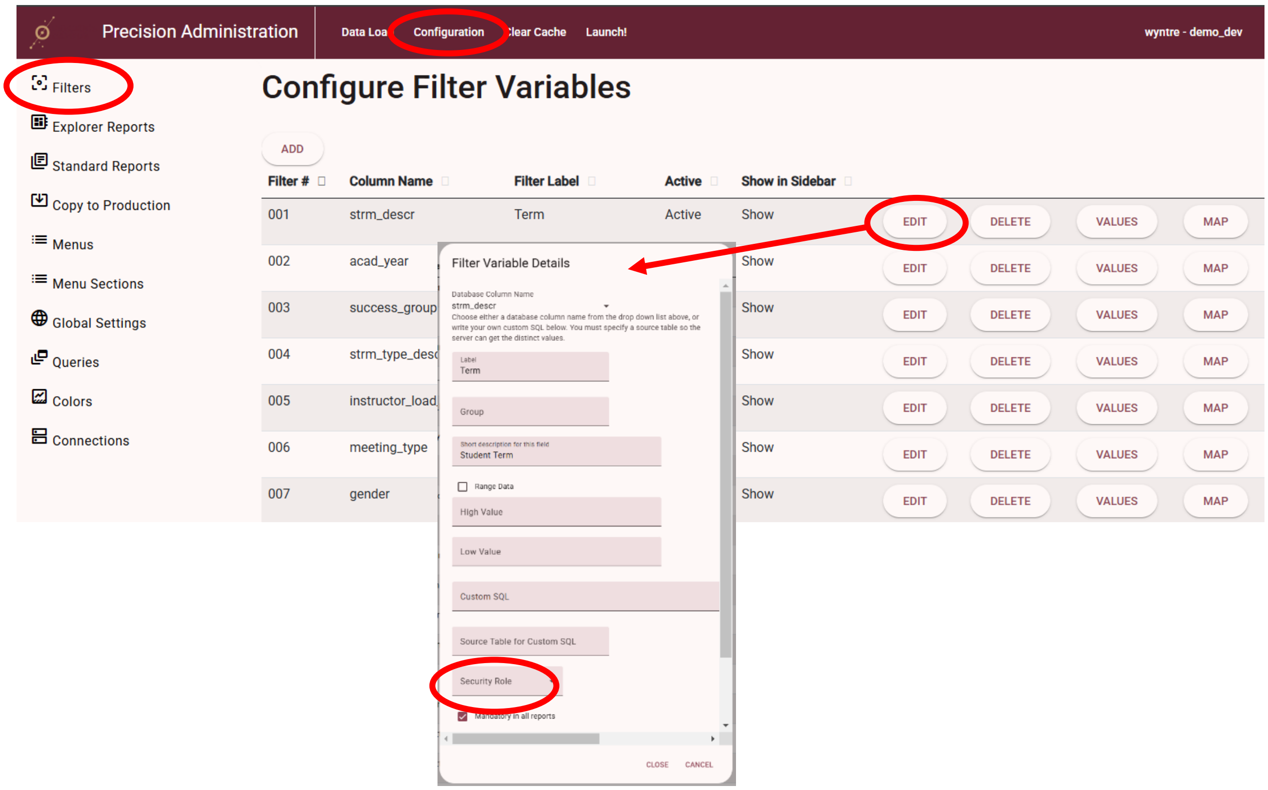


3. Review changes on dev then push to prod:
   a. Select **Launch!** or **Clear Cache** and refresh browser to review new data on dev.
   b. Once changes are confirmed, select **Copy to Production** to push them to prod.

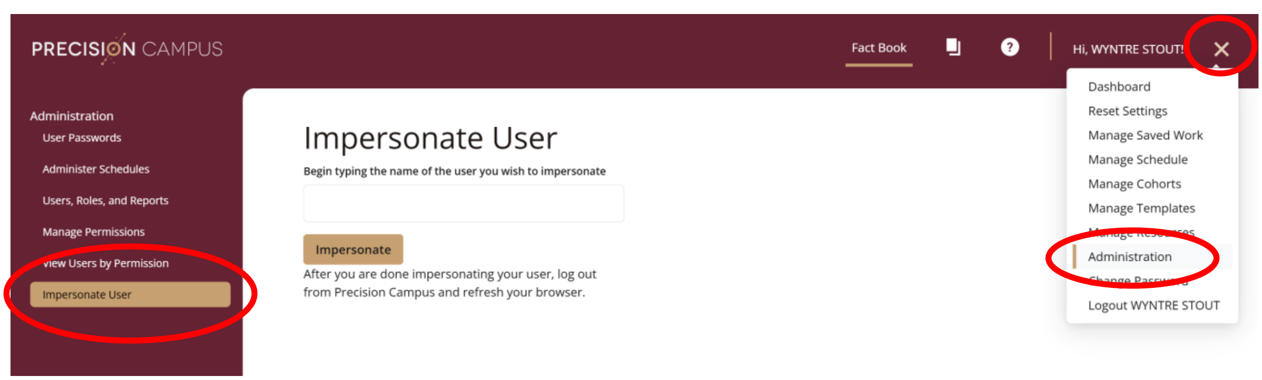
Restricting Access to Filters

Adjustments to filters are completed in the admin tool for dev then moved to prod.

1. From **Configuration**, click **Filters** and navigate to filter's record then select **Edit**.
2. Adjust **Security Role** to limit use by role (e.g., IR Only) then close out of Filter Variable Details window and select **Close**.



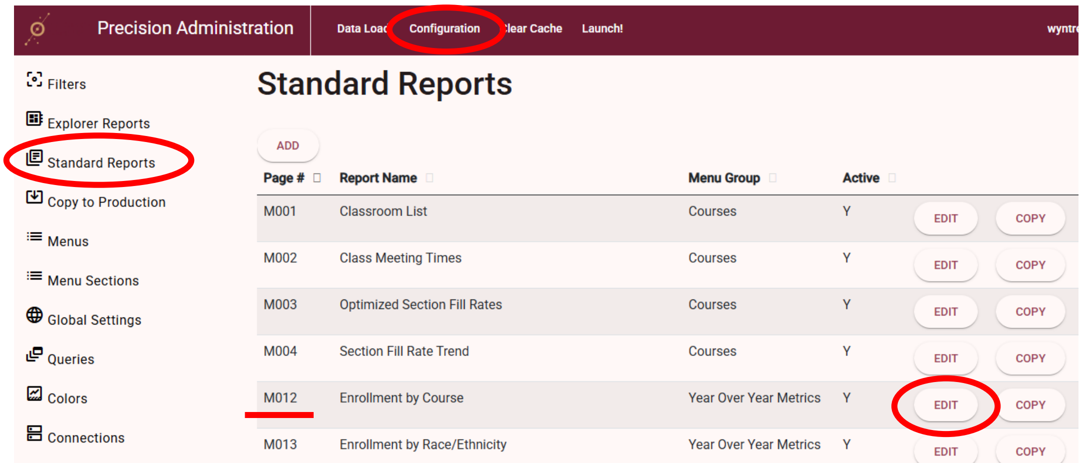
3. Confirm changes then push to prod
   a. Select **Launch!** or **Clear Cache** and refresh browser to review new data on dev.
   b. Impersonate users who should/should not have access to confirm restrictions:
      i. On dev site, select **Administration** from hamburger menu at top right.
      ii. Select **Impersonate User** from left side menu and type a user's name.
   c. Once changes are confirmed, select **Copy to Production** to push them to prod.



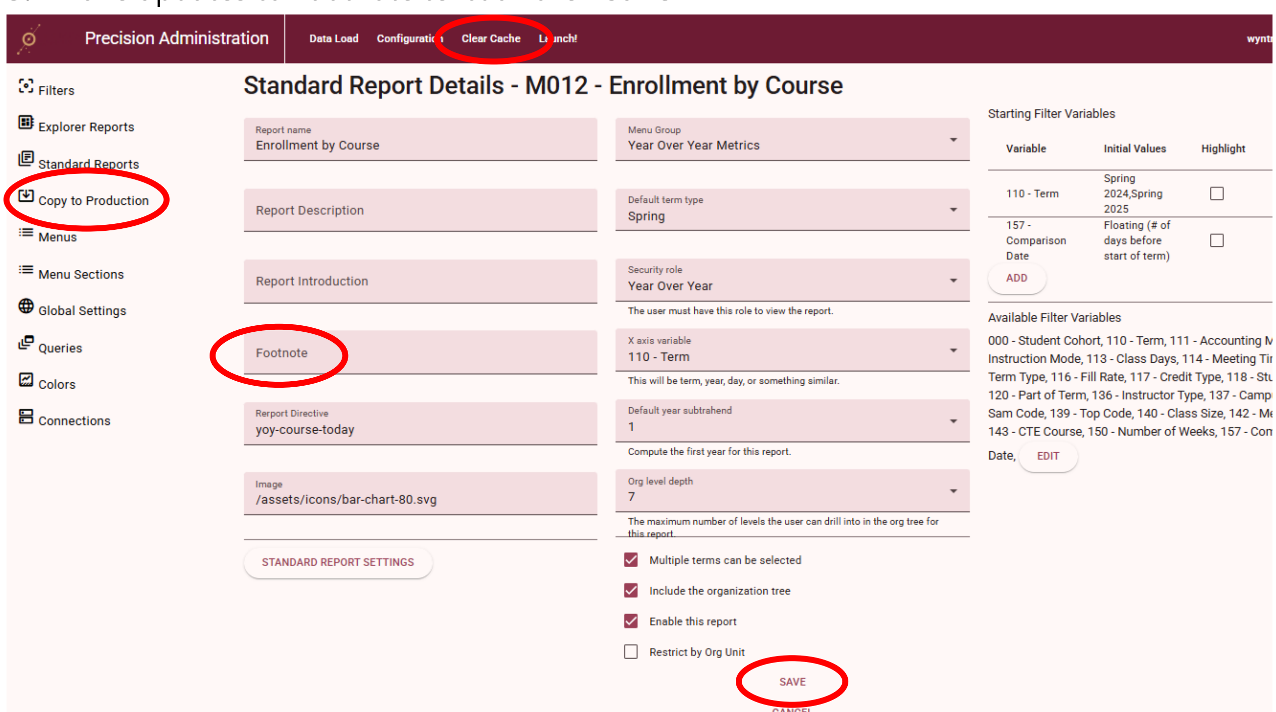
Update a Report's Footnote

Adjustments to reports are completed in the admin tool for dev then moved to prod.

1. Navigate to **Configuration** then select Explorer Reports OR Standard Reports, depending on the type of report to be adjusted
    a. Explorer Reports have a URL suffix of "pivot?page=" and the report's #
    b. Standard Reports have a URL suffix of "menuId=" with "M" and the report's #
2. Locate report then select **Edit**



3. Make updates to Footnote textbox then **Save**

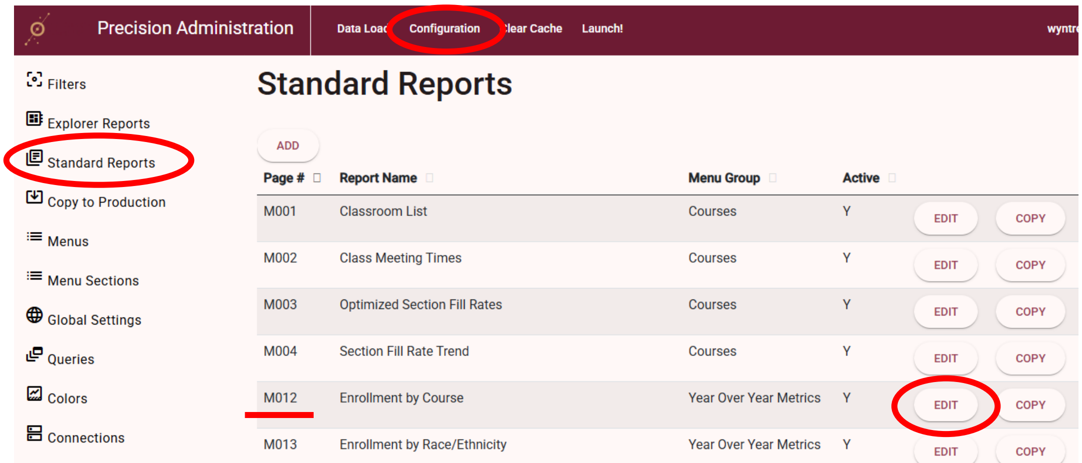


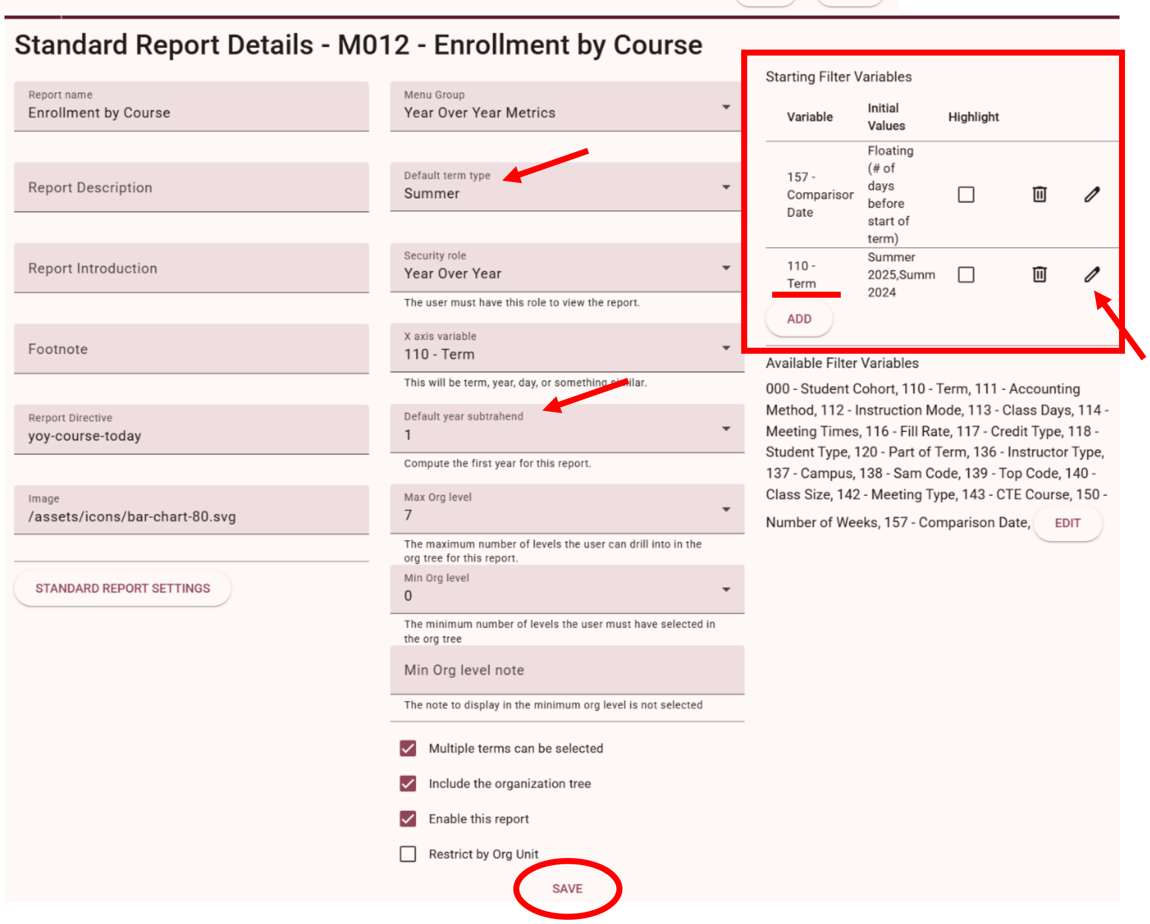
4. Review changes on dev then push to prod:
    a. Select **Launch!** or **Clear Cache** and refresh browser to review new data on dev.
    b. Once changes are confirmed, select **Copy to Production** to push them to prod.

Change the Default Terms Displayed in a Report

Adjustments to reports are completed in the admin tool for dev then moved to prod.

1. Navigate to **Configuration** then select Explorer Reports OR Standard Reports, depending on the type of report to be adjusted
   a. Explorer Reports have a URL suffix of “pivot?page=” and the report’s #
   b. Standard Reports have a URL suffix of “menuId=” with “M” and the report’s #
2. Locate report then select **Edit**





3. Adjust the default terms
    a. If default terms are set by **Starting Filter Variables**, select the pencil icon to edit selections for the starting term values
    b. To change the default term type in the absence of any starting filter variables, select the new term type from the **Default term type** dropdown
    c. To change the default number of years displayed in the absence of any starting filter variables, update the selection from the **Default year subtrahend**.
        i. Note that the **Default Year Subtrahend** is the number of years displayed in reference to the **Most Recent Year** set in **Global Settings**
        ii. When new data are added and the Most Recent Year is changed, the default years displayed in reports will adjust accordingly
4. **Save** changes
5. Review changes on dev then push to prod:
    a. Select **Launch!** or **Clear Cache** and refresh browser to review new data on dev.
    b. Once changes are confirmed, select **Copy to Production** to push them to prod.