

Sample Automated Report

For the Center for First-Generation Student Success, Crow Insight developed an automated reporting system that allowed users to create customizable reports.

HOW IT WORKS

In an Excel file, users specify the content and format for each page in a report. This file is uploaded into the application along with data files and any images included in the report. The application then translates the uploaded files into a downloadable PDF.

TEXT FORMATTING

Users write text in markdown, which is then translated into HTML and converted into a PDF. Using markdown, users can style text using markdown syntax, enabling them to **bold** or *italicize* text as they wish.

CHARTS

When viewing the accompanying dashboard, users can copy a chart settings dictionary. Users can specify what charts they want to include in the report by pasting this dictionary into the Excel file. During the report creation process, the uploaded data will be parsed and formatted according to the settings in the dictionary and a chart will be outputted and embedded in the report.

Look through the following pages to view a sample of the possible chart and page formats.

"In the report builder file, users can specify callout text to highlight quotes or concepts."

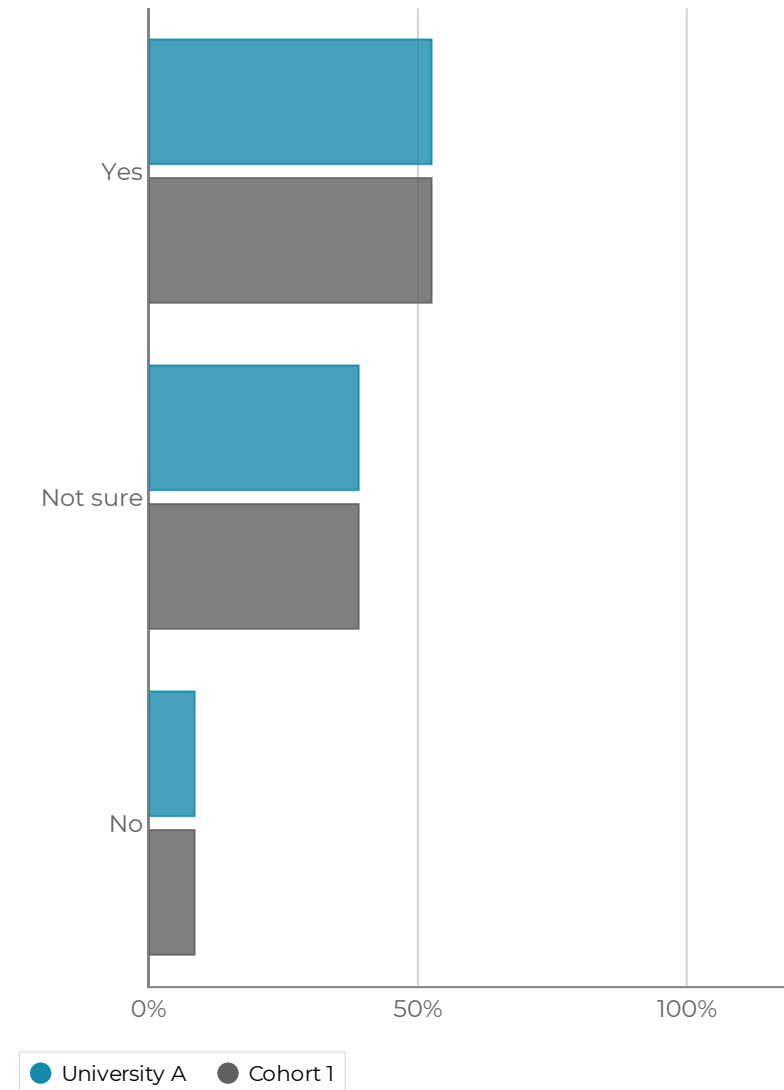
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List Formatting

Using markdown, users can style and control list formatting. A variety of possible list formats is displayed below.

- **Bullet Bolded Text.** Lorem ipsum dolor sit amet.
- Bullet with just body text
 - Indented Bullet.

Figure 1.1: Sample Bar Chart





Sample Page with Image

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Chart Customization

In the dashboard, users have access to a variety of features that allow them to customize a chart. Among these features are the ability to specify data marker colors, transpose chart axes, remove specific tick labels from display, add a legend, and specify data label formats.

Figure 1.2: Sample Horizontal Bar Chart

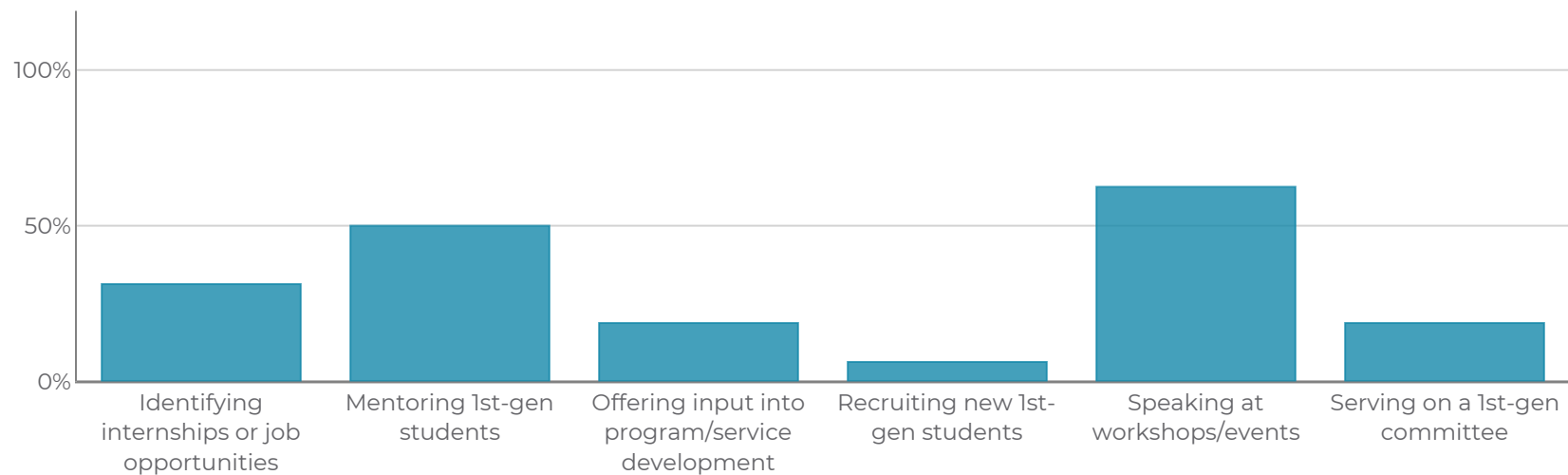
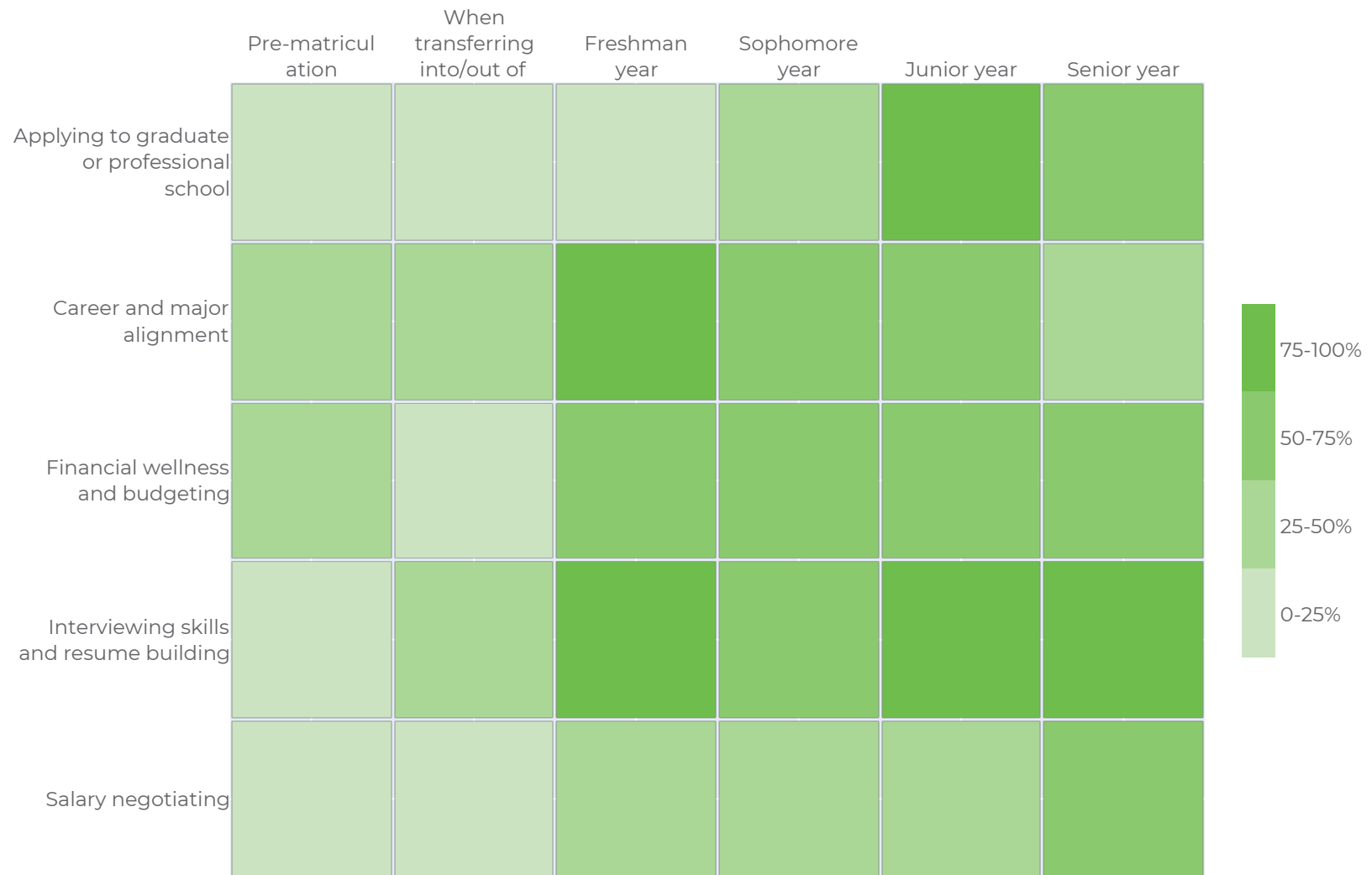


Figure 1.3: Full Page Chart (Sample Heat Map)



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Figure 1.4: Sample Stacked Bar Chart

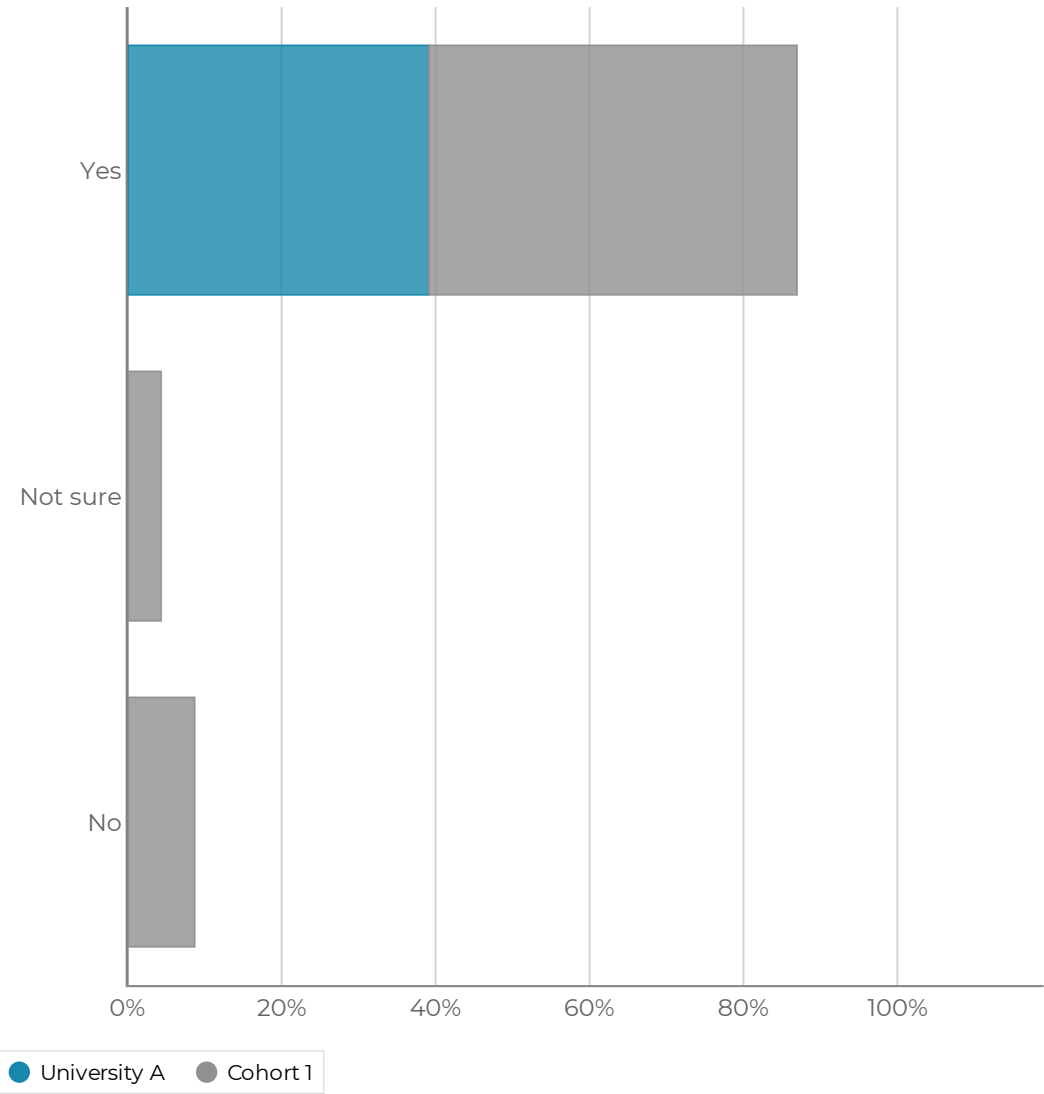
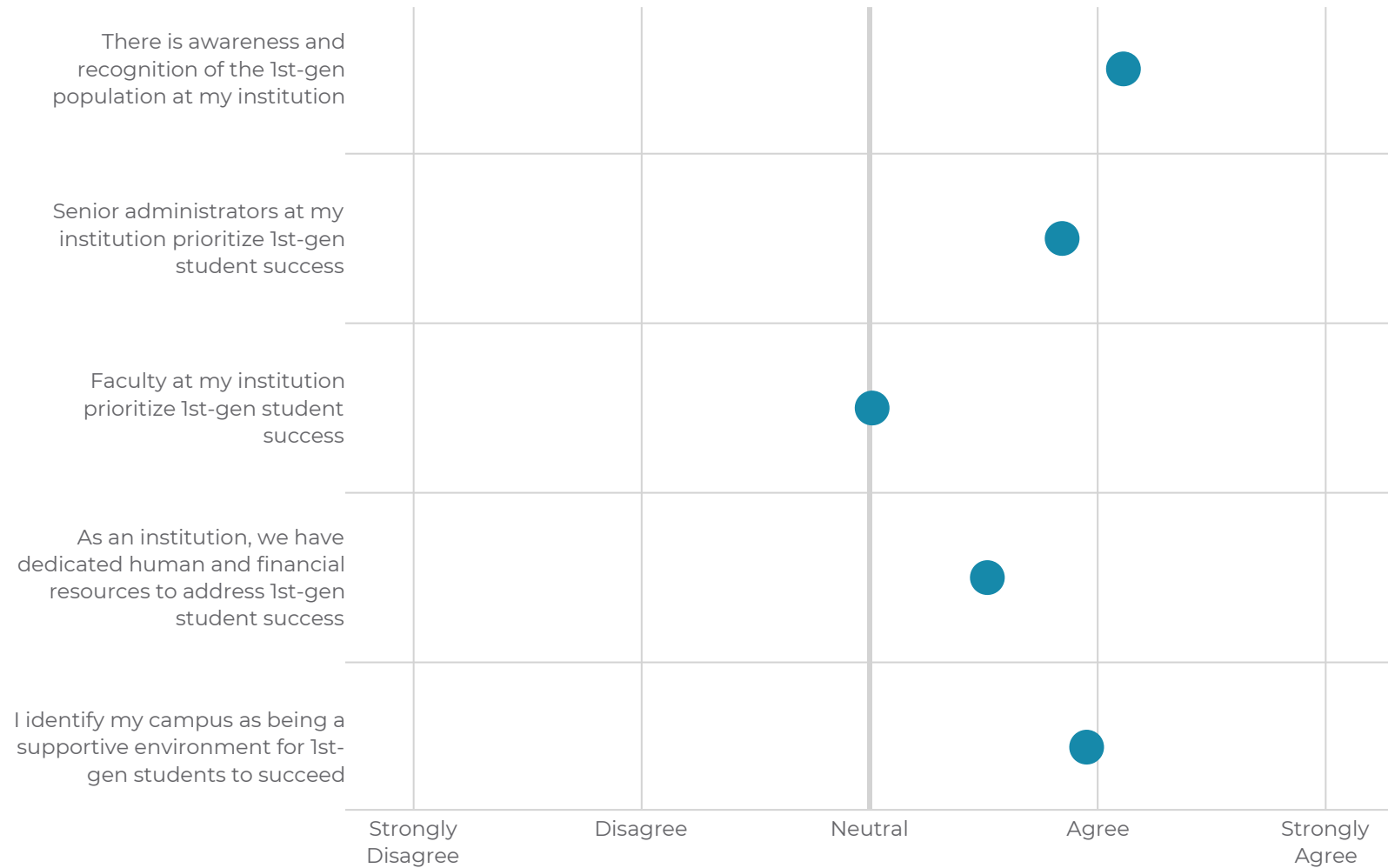


Figure 1.5: Full Page Chart (Sample Dot Plot)



Report Metadata

Created: 2020-12-23_12-29-01

Report Builder Inputs

- report_builder-ITRS_v01_CPB_portfolio.xlsx
- first_scholars_stock_banner.jpg

Data Inputs

- insights_tool_2020-12-04.xlsx
- metadata_2020-08-28.xlsx
- institutional_readiness_assessment_2020-12-04.xlsx
- question_grouping_input_2020-11-10.xlsx
- shorthand_2020-09-29.xlsx