

Creating a Report

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Overview

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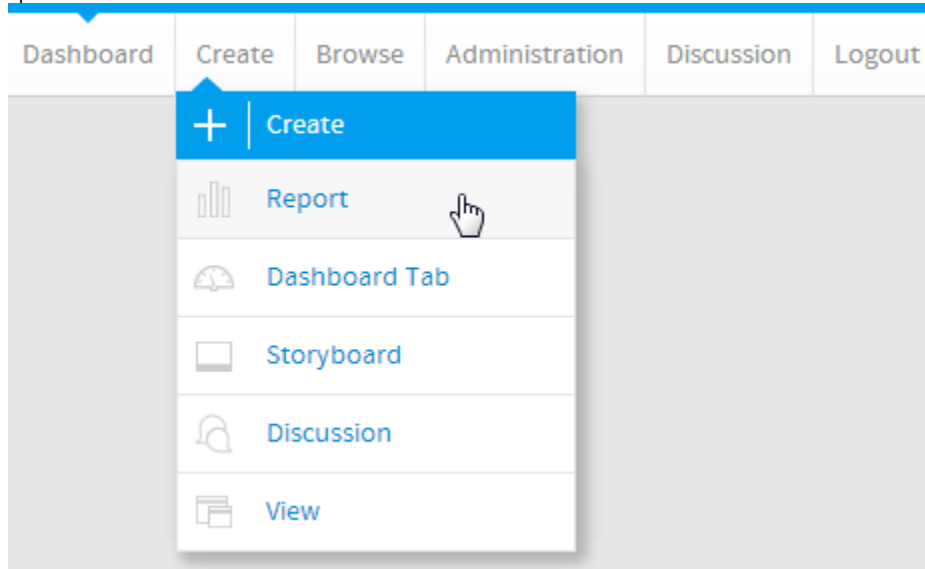
Having created our view we are now ready to create reports using the Report Writer. When creating a new report you will have begin with an initialisation step. The step is required for you to select the source system and the view you wish to access, as well as the type of builder you wish to use.

Create

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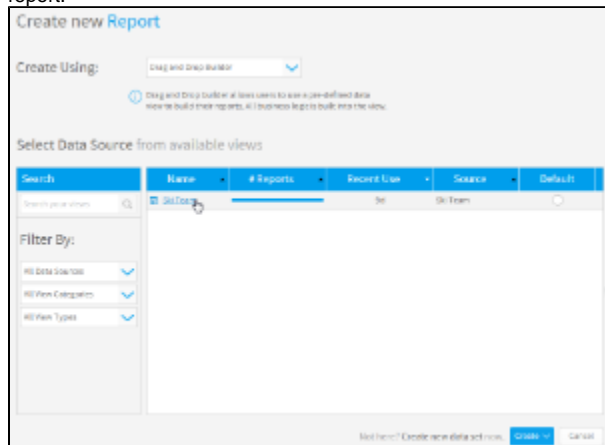
This section walks you through starting the report building process, including selecting the type of builder, and the view.

1. Click the **Create** link in the main navigation bar of the system, and select the **Report** option.



2. You will now be on the Report Initialisation page. Ensure the **Drag and Drop Builder** has been selected to use for report creation.

3. Click on the **Ski Team** view in order to use the fields defined within it for creating the report.

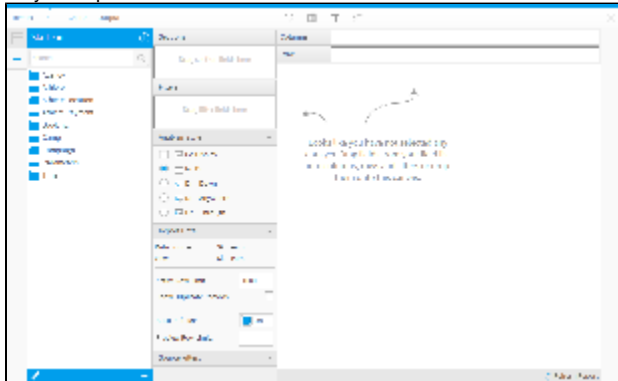


Data

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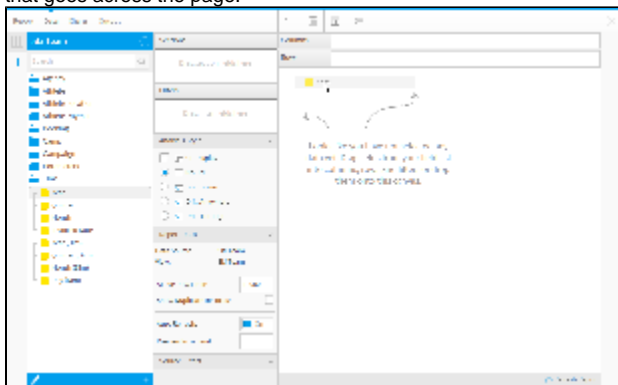
This will walk you through building a basic report

You will now be on the **Data** step of the builder, where you will define the fields used in your report, format them, and define any filters, sections and other advanced options for your report.

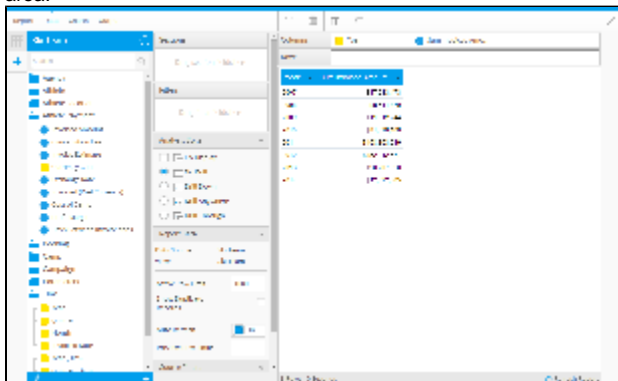


2. On the left you will see a list of folders, expand the **Time** folder in order to access time related fields.

3. Drag and drop the **Year** field into the preview area, as pictured here. You could also drag it directly into the Column or Rows list if you prefer. Dragging into the Columns list creates a Year column that goes down the page, where the Rows creates a Year row that goes across the page.

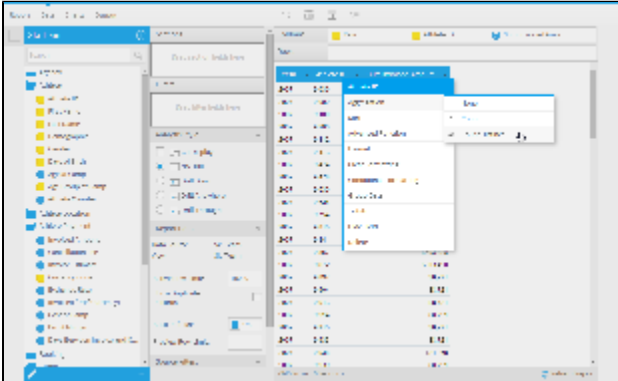


4. Expand the **Athlete Payment** category and drag the **Invoiced Amount** field next to the **Year** field in either the **Columns** or **Preview** area.



5. Expand the **Athlete** category and drag the **Athlete ID** field between the **Year** and **Sum Invoiced Amount** fields.

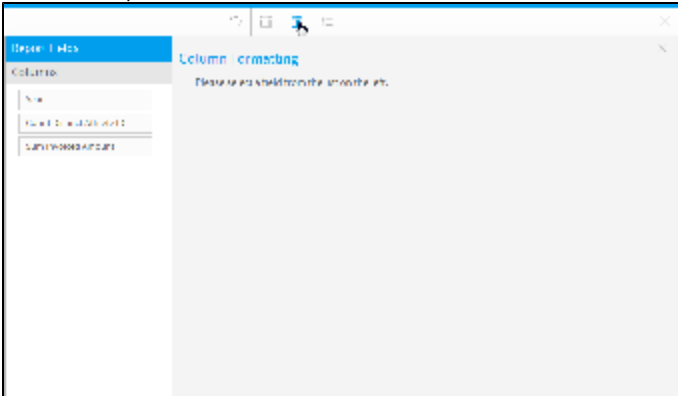
6. Click on the drop down menu on the Athlete ID field and set the **Aggregation to Count Distinct**.



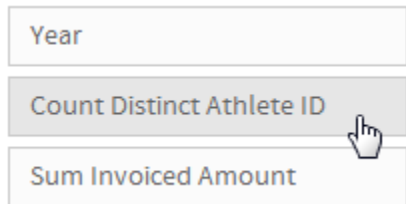
Your report should now look like the one pictured here.

| Year | Count Distinct Athlete ID | Sum Invoiced Amount |
|------|---------------------------|---------------------|
| 2007 | 127 | \$17,633,473 |
| 2008 | 138 | \$8,611,470 |
| 2009 | 421 | \$11,012,244 |
| 2010 | 483 | \$81,690,100 |
| 2011 | 589 | \$158,353,519 |
| 2012 | 608 | \$152,912,577 |
| 2013 | 529 | \$28,199,351 |
| 2014 | 50 | \$12,522,605 |

7. Click on the **Column Formatting** icon in the main Formatting bar in order to open the formatting menu. Here you can adjust the title and formatting options applied to each of the fields in the report.



8. Select the **Count Distinct Athlete ID** field to open its options.



9. Change the **Display** name of the field to **Athletes**.

Report Fields

Columns:

- Year
- Count Distinct Athlete ID
- Sum Invoiced Amount

Column Formatting - Count Distinct Athlete ID

Display

Display: Define the title of the column.

Format: Display the values as a decimal.

Decimal Places: Define the number of decimal places to be displayed.

Prefix: Define text to display before the field value.

Suffix: Define text to display before the field value.

Rounding: Define the rounding you wish to apply to the field.

Thousand Separator: Display thousand separators in the numeric value. ☐

Include Negatives: Display negative values with a minus sign. ☐

Show Field: Display the column in the table output. ☐

10. Select the **Sum Invoiced Amount** field and change the name to **Invoiced**.

Report Fields

Columns:

- Year
- Athletes
- Sum Invoiced Amount

Column Formatting - Sum Invoiced Amount

Display

Display: Define the title of the column.

Format: Display the values as a decimal.

Decimal Places: Define the number of decimal places to be displayed.

Prefix: Define text to display before the field value.

Suffix: Define text to display before the field value.

Rounding: Define the rounding you wish to apply to the field.

Thousand Separator: Display thousand separators in the numeric value. ☐

Include Negatives: Display negative values with a minus sign. ☐

Show Field: Display the column in the table output. ☐

11. Click the **X** button on the top-right corner of the Column Formatting menu to close it and apply changes.

Report Fields

Columns:

- Year
- Athletes
- Sum Invoiced Amount

Column Formatting - Sum Invoiced Amount

Display

Display: Define the title of the column.

Format: Display the values as a decimal.

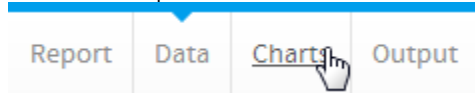
Your report should now look like the one pictured here.

| Year | Athletes | Invoiced |
|------|----------|---------------|
| 2007 | 127 | \$17,633,473 |
| 2008 | 138 | \$8,611,470 |
| 2009 | 421 | \$11,012,244 |
| 2010 | 483 | \$81,690,100 |
| 2011 | 589 | \$158,353,519 |
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Charts

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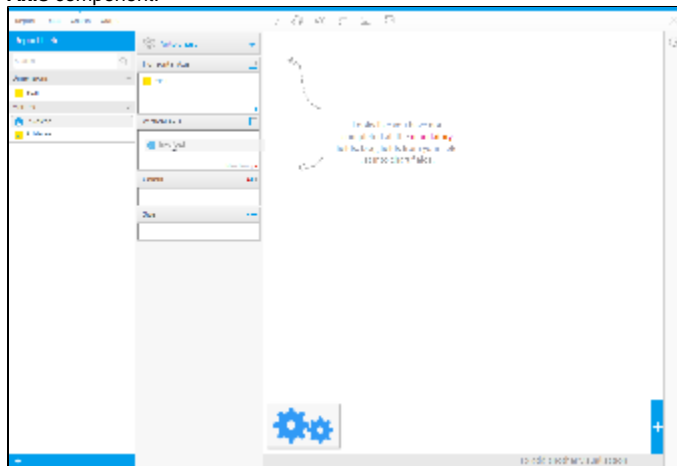
1. Click on the **Charts** link in the main navigation bar in order to progress to the Chart Builder step.



You will now have a list of fields on the left side of the builder that are available from the table you defined on the **Data** step.

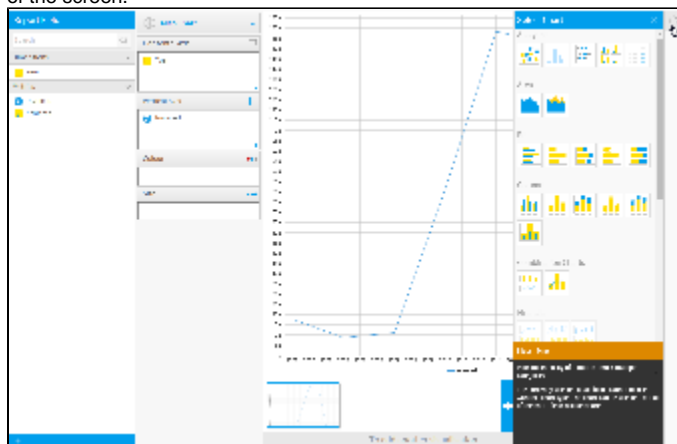
2. Drag the **Year** field into the **Horizontal Axis** component of the **Auto Chart** builder.

3. Drag the **Invoiced** field into the **Vertical Axis** component.



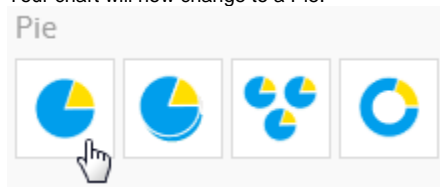
You will now have generated a line chart. In order to change the chart type manually, you will need to switch from the **Auto Chart** builder to a specific type.

4. Open the **Select Chart** panel on the right of the screen.



5. Locate the **Pie** section and choose a basic **Pie Chart**.

Your chart will now change to a Pie.

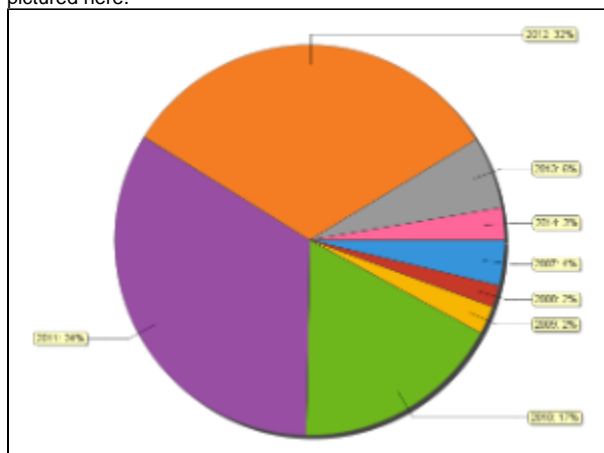


6. Click on the **Labels** formatting menu in the main navigation bar in order to enable some labelling.

7. Set **Labels** display to **On** and select the **Category** and **Percentage** options.

8. Click **X** to close the menu and apply your label settings.

Your chart should now look like the one pictured here.



Output

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1. Click on the **Output** link in the main navigation bar in order to progress to the Report Output step. Here you can apply formatting options and save the report.



2. Click on the **Report** link in the main navigation bar and select the **Save** option.

3. Define a **Name** and **Description** for the report, then provide **Category** and **Sub Category** options for storage.

4. Click on the **Activate** button to save your report and activate it for consumer use.

Report Data Charts Output

Report Settings

Yearly Invoice Breakdown

Description

Tutorial Periods

+ Add tags

Report Lifespan Public Private

All users with Category access will be able to view this report

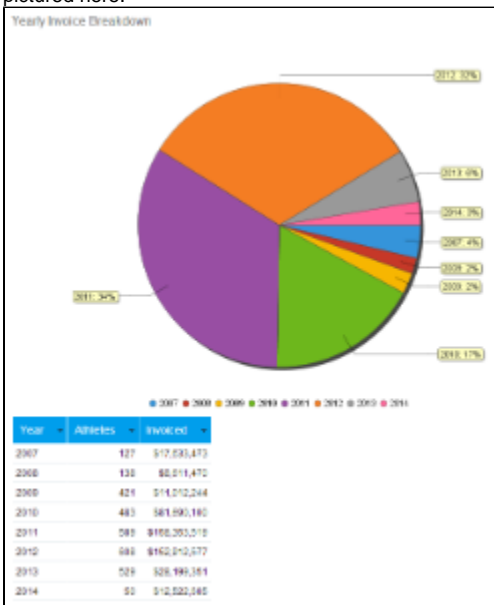
Display

Refresh

Distribution Security

Activate Draft Cancel

5. Your report should now look like the one pictured here.



Further Information

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For more information around the creation of Reports in Yellowfin see the [Report Builder](#) section of the wiki.

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