Drill Through Reports

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Overview

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Drill Through is the ability to click on a hyperlink and move from one report to another - typically to show more detail. Values related to the row you've clicked on will be passed in as parameters into the linked report to filter the data.

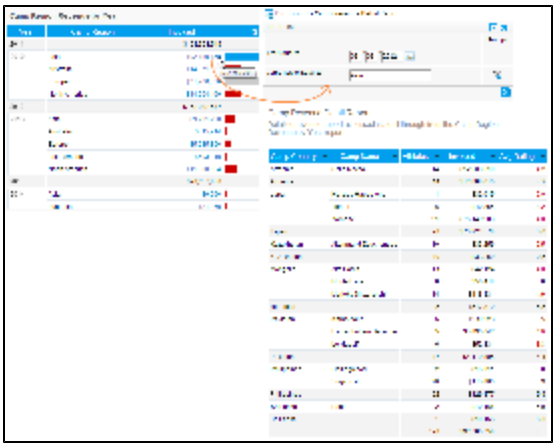
Drill Through links work on both table data and chart data.

> *See Drill Capability on Charts for more information.*

Drill Through Example

When a report has Drill Through enabled it will display fields with a hyperlink on them.

When the hyperlink is clicked a new report will open – generally with a greater level of detail. The 'Return to Report' link provides a way for the user to return to the parent report.



Tips on Creating Drill Through Reports

When creating related reports it is worth planning the reporting outcome that you are attempting to achieve.

1. **Plan Top Down** – determine which report will be your starting point. For example if you wish to deliver a report of sales by region you may want to drill into sales by sales person for a selected region.
2. **Build Bottom Up** – once you have determined all the reports that are needed for either drill through or co-display build the required reports from the bottom up. The last report you will write will be the report that you wish to be the entry point.

Note: If you wish to have a drill through report, the child must have at least one user prompt filter, and the same data must exist on the parent report. For example - the filter is based on Last Name, so you must have the Last Name field on your report.

Creating a Drill Through Report

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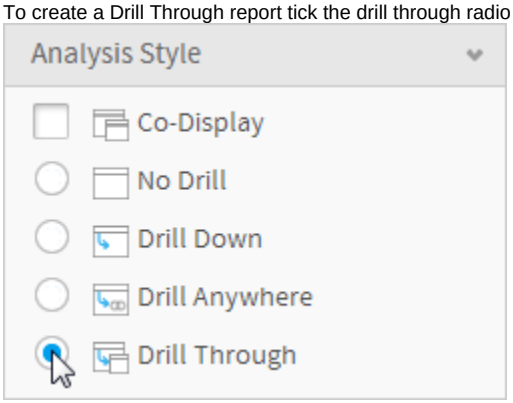
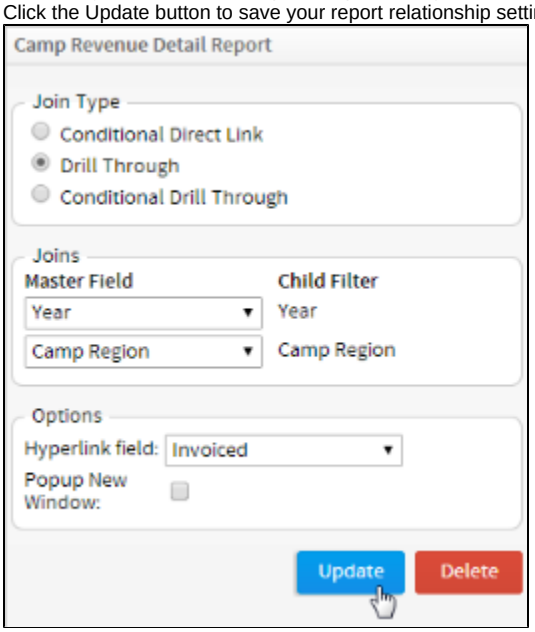
1. To create a Drill Through report tick the drill through radio button on the Report Options Analysis menu.



2. Progress to the Related Reports step of the Report Builder using the navigation buttons at the top of the page. You will now need to search for the child report you wish to add, using the left hand report list panel.
3. Drag your child report into the appropriate Related Reports area, in this case, the Drill Through box.
4. You will now need to complete the relationship setup in the right hand panel. Select the type of Drill Through report you wish to use, in this case, Drill Through.
5. In the Joins section you will have to link fields from the parent report to the child report. For the drill through to function, relevant fields must exist in the parent report that match the data required by the Child report filters.
   A master field contains the value to be passed through to the Child report filter. In a drill through report, it is expected that there must be at least one field from the parent report that provides a filter for the child report.
   If corresponding parent fields do not exist you will have to leave this page, return to the Report Data page and insert a new field onto the report to allow a link to occur.
   The fields that are displayed are those that are required by the child report as USER PROMPT FILTERS. Instead of a user filling out the prompt, Yellowfin will automatically pass these variables through when linking to the new report.
6. The Options area defines which field on your report will be the **hyperlink** that links the reports together. Only one field can have a hyperlink for each drill through report, so choose the field that is going to be most intuitive to the user of the report. The linked field may or may not be critical in terms of passing data from one report to another.
7. Choose if you want the new report to open in a lightbox as a popup or to stay inline and open the new report.
8. Click the Update button to save your report relationship settings.



Drill Through with Popup Reports

The default settings for a drill through report is to display them in-line. What this means is that a new window is not opened as you drill through your reports but rather the report is replaced with a new report.

If you do select to drill through to a popup a lightbox will open over the parent report. This is useful if you do not want your report users to leave the page that they are on when they initiate the drill to more detail. There are constraints on this, however:

1. No additional drill down or drill through is possible on the pop-up report.

2. No co-display reports are displayed. For example if you are drilling to a report with multiple related reports only the 'master' report will be displayed.
   So the reports that you wish to drill to will not have a high level of user interactivity.

Drill Through on Cross Tab Report

If you wish to enable Drill Through on a cross tab report you will have to ensure that both the column and row attributes are included in the drill through linked attributes.
For example if you have a cross tab that includes:

Sum Revenue	2001	2002
Australia	71,956	80,731
Austria	0	84,700

Then any drill through must include both the Country and the Year. This is because if you try and drill through on only one value eg. Country you will be selecting multiple records (2001 and 2002) which is confusing to the user.

Therefore, the drill to child needs to have both the Year and the Country included in the filter options. Now when the user clicks on a value that they wish to know more about Yellowfin is able to pass through the correct parameters – both Year and Country to a child report.

Conditional Drill Through

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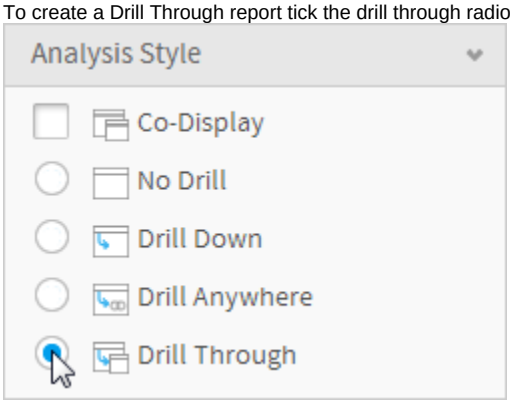
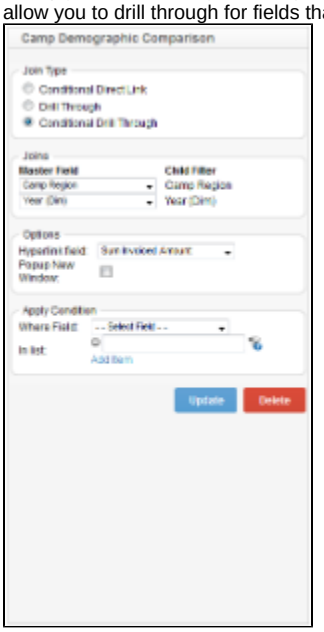
1. To create a Drill Through report tick the drill through radio button on the Report Options Analysis menu.
   

2. Progress to the Related Reports step of the Report Builder using the navigation buttons at the top of the page. You will now need to search for the child report you wish to add, using the left hand report list panel.
3. Drag your child report into the appropriate Related Reports area, in this case, the Drill Through box.
4. You will now need to complete the relationship setup in the right hand panel. Select the type of Drill Through report you wish to use, in this case, Conditional Drill Through.
5. In the Joins section you will have to link fields from the parent report to the child. For the drill through function, relevant fields must exist in the parent report that match the filters required by the child.
   A master field is a field that will pass through the required data to the child filter. In a drill through report it is expected that there must be at least one field from the parent report that provides a filter for the child.
   If Corresponding Parent Fields do not exist you will have to leave this page, return to the Report Data page and insert a new field onto the report to allow a link to occur.
   The fields that are displayed are those that are required by the child report as USER PROMPT FILTERS. Instead of a user filling out the prompt Yellowfin will automatically pass these variables through when linking to the new report.
   In the Options area, define which field on your report will be the hyperlink that links the reports together. Only one field can have a hyperlink per drill through, so choose the field that is going to be most intuitive for the user of the report. The linked field may or may not be critical in terms of passing data from one report to another.
6. Choose if you want the new report to open in a lightbox or to stay inline and open the new report.

7. Set up your condition by selecting a report field and providing an ‘equal to’ value. For example, WHERE Country IS EQUAL TO Australia, will allow you to drill through for fields that have a Country value of ‘Australia.



8. Click the Update button to save your report relationship settings.

Link To Report

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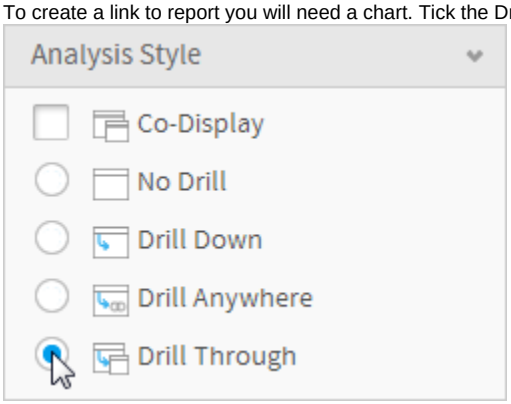
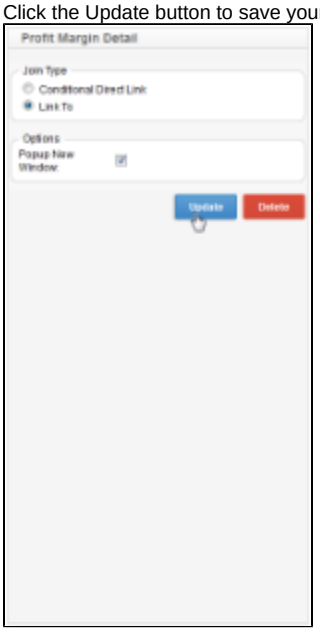
Link To reports allow you to link a chart to a much more detailed report, without the need for shared fields/filters. **Note:** the parent report MUST have a chart

1. To create a link to report you will need a chart. Tick the Drill Through radio button on the Report Options Analysis menu.



2. Progress to the Related Reports step of the Report Builder using the navigation buttons at the top of the page
3. You will now need to search for the child report you wish to add, using the left hand report list panel.
4. Drag your child report into the appropriate Related Reports area, in this case, the Drill Through box.
5. You will now need to complete the relationship setup in the right hand panel. Selection the type of Drill Through you wish to use – Link To.
6. You now have the option to set the linked report as lightbox, or a new page. You don’t have to set up any related or hyperlinked fields as the entire chart will link to this report, and there is no data/filter share between the two.

7. Click the Update button to save your report relationship settings.



Conditional Direct Link

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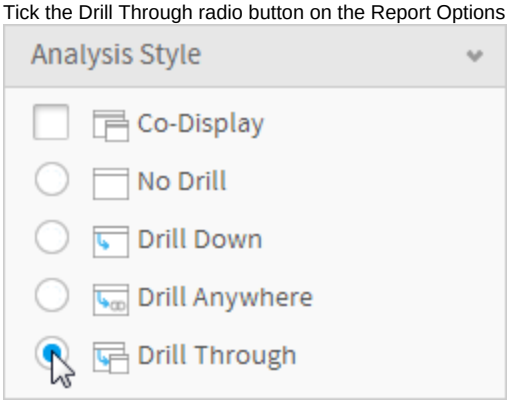
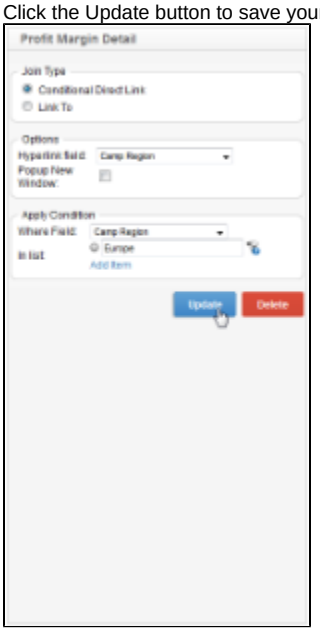
Conditional Direct Link reports allow you to link a report or chart to a much more detailed report, without the need for shared fields/filters, based on an applied condition.

1. Tick the Drill Through radio button on the Report Options Analysis menu.



2. Progress to the Related Reports step of the Report Builder using the navigation buttons at the top of the page. You will now need to search for the child report you wish to add, using the left hand report list panel.
3. Drag your child report into the appropriate Related Reports area, in this case, the Drill Through box.
4. In the Options area, define which field on your report will be the hyperlink that links the reports together. Only one field can have the hyperlink, so choose the field that is going to be most intuitive for the user of the report.
5. You now have to select which field to link with and set a condition for the drill through. When this condition matches the value of a field, the hyperlink will be active.

6. Click the Update button to save your report relationship settings.



Multi Drill Through

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