

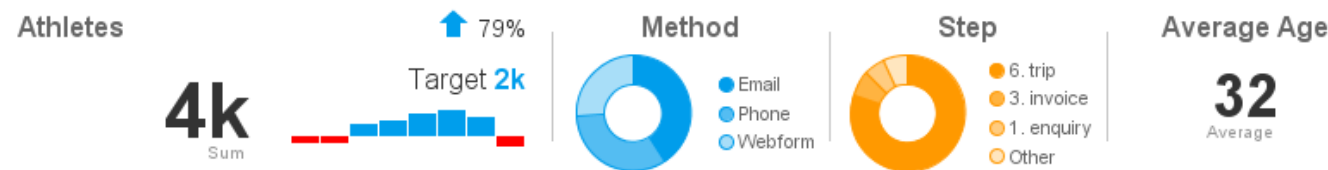
Report Summary

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Overview

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Report Summaries allow the user to build summary level KPI and chart displays into their report. This allows for a row of summary information to be displayed along with a very detailed report, providing to levels of analysis.



In order to create a Report Summary you will need to be on the Output step of the Report Builder, while it's in draft mode. From here you will find a Summary button on the main formatting toolbar.



Exceptions

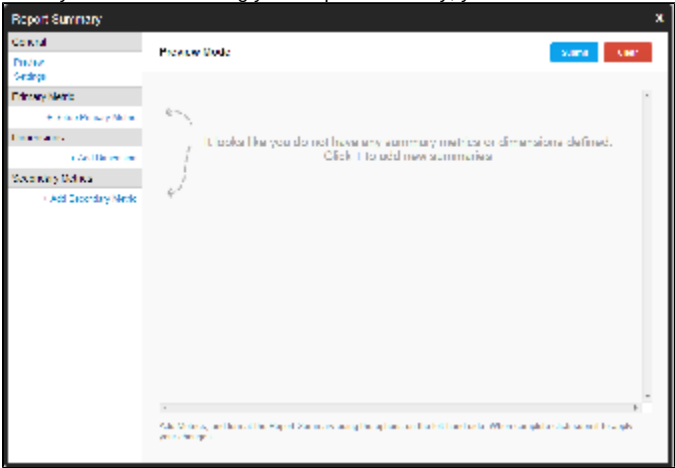
Report Summaries cannot be used in the following cases:

- Drill Down Reports (the summary will display before the report has been drilled into)
- Drill Anywhere Reports (the summary will display before the report has been drilled into)
- Section Reports
- KPI Reports
- Visible Series Selection Charts
- Time Series Charts with Date Sliders

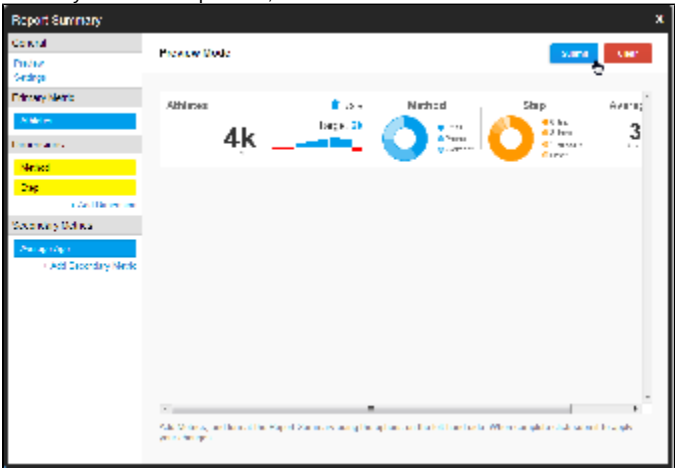
Preview

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When you first start building your Report Summary, you will be taken to the following lightbox:



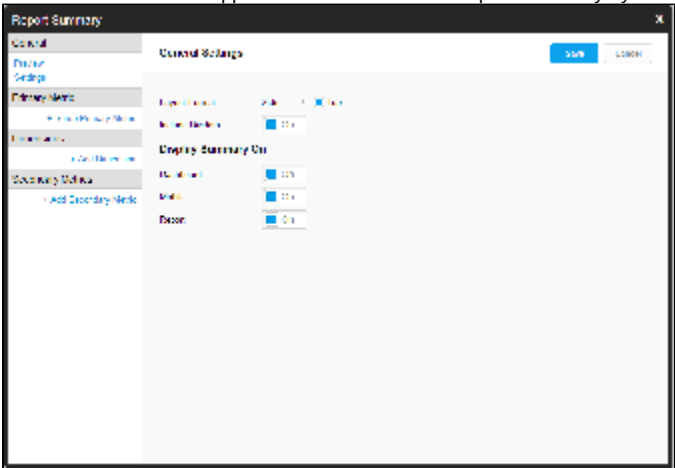
Here you are shown all the building options down the left of the page, with the preview pane on the right currently empty. As soon as you build summary content you will see a preview, as below.



Settings

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You can customise the appearance and use of the Report Summary by clicking on the **Settings** option on the left of the builder.



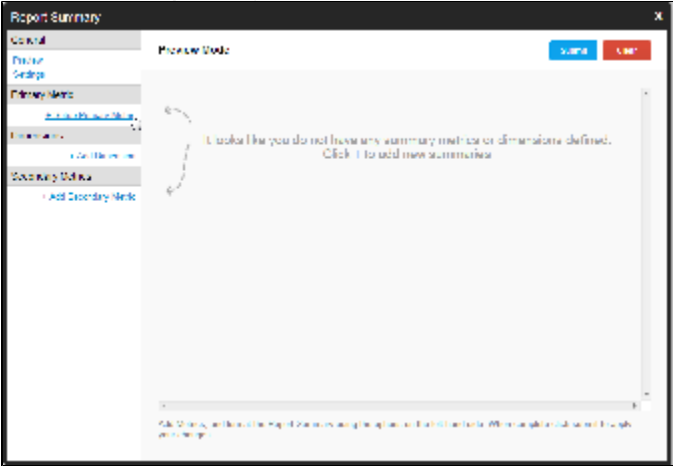
Setting	Options	Description
Layout Format	Side / Top	Display the summary either at the top or side of the chart. If the report is table only the display will always be 'top'.
Include Dividers	Off / On	Display dividers between each of the elements in the Report Summary (Primary Metric, Dimensions, Secondary Metrics).

Dashboard	Off / On	Make the Report Summary available for display on the Dashboard. You will still need to enable it when creating the Dashboard Tab.
Mobile	Off / On	Make the Report Summary available for display on mobile devices.
Report	Off / On	Make the Report Summary available for display on the Report Preview page (away from the dashboard).

Primary Metric

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The first thing you need to do, when creating your Report Summary, is define the Primary Metric of the report. This is the main measurement in the report.

1. Click on the **+ Setup Primary Metric** link on the left hand side of the builder.



2. Define the options used to build the summary display. Depending on the Target Type settings you select, you may not have all of the options listed here.

Option	Possible Values	Description
Display Title	Text Entry	Provide a label to be used in the Report Summary. This does not have to be the same as the Column Name.
Metric	Metric fields	Select the metric field you wish to assign as the Primary Metric.
Aggregation	% Change, Average, Change, Count, Count Distinct, Maximum, Minimum, Sum	Select the aggregation you wish to apply to the metric. The Summary is going to look at this figure as a whole, not split by any categories, so it's important to select the correct aggregation.
Target Type	None, Periodic, Total	If you wish to compare your Primary Metric value to that of a target or budget, define here.
Display Title	Text Entry	Provide a label to be used in the Report Summary for the target.
Date Field	Date field	If you have selected a Periodic Target you will need to select a date field to define the periods.
Set Target	Manual or Metric fields	Define the Target as a field, or a user defined value
Desired Variance	Above, Below, Range	Define where you want the variance to fall. For example, do you want your metric to be above the target?
Variance Display	None, Actual, Percentage	Select the display of the variance.
Sparkline	None, Actual, Variance	Select the display of the variance for each period.

Once populated, the builder will display a preview of the summary on the top right of the screen.

The screenshot shows the 'Report Summary' builder interface. On the left, there's a sidebar with sections: Overview, Primary Metric, Secondary Metrics, and Dimensions. The 'Primary Metric' section is active. The main area is titled 'Primary Metric Setup' and contains several dropdown menus: Metric (set to Address), Dimension (set to Address), Target (set to 5k), and a 'Define Target' section with dropdowns for Target Type (set to Target), Case Field (set to None), Case Target (set to Manual), and Case Value (set to 200). A 'Preview' button is visible. On the right, a preview of the report summary is shown, featuring a bar chart with a value of 4k and a target of 5k.

3. Click **Save** to keep your selections and continue building your Report Summary.

This screenshot is identical to the previous one, but the 'Save' button in the top right corner of the 'Primary Metric Setup' section is now highlighted in red, indicating it has been clicked. The rest of the interface remains the same.

Dimensions

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In order to provide categorical summaries you can define Dimensions for display in your Report Summary. These display a selected metric, split into categorical values by a dimension field, displayed on a donut chart.

1. Click on the **+ Add Dimensions** link on the left hand side of the builder.

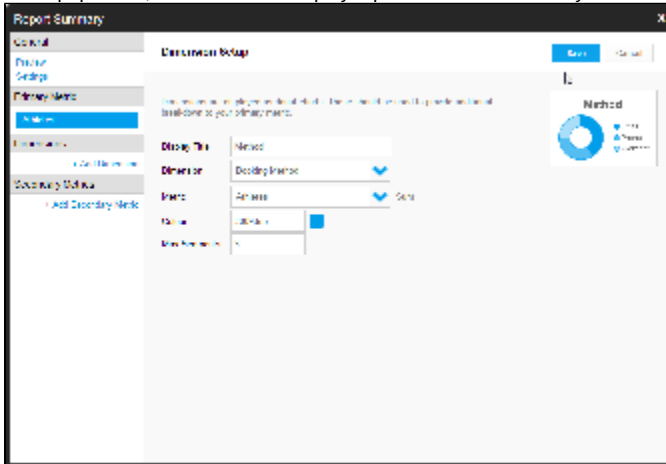
This screenshot shows the 'Report Summary' builder interface after clicking the '+ Add Dimensions' link. The 'Add Dimensions' link in the left sidebar is now highlighted in blue. The main area and the preview on the right remain the same as in the previous screenshots.

2. Define the options used to build the summary display.

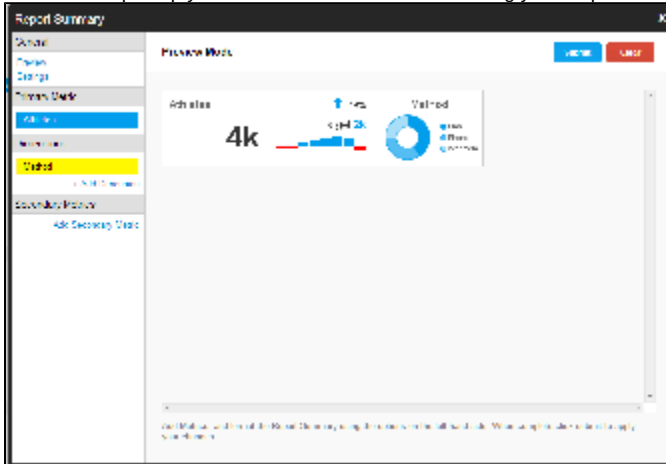
Option	Possible Values	Description
	Text Entry	Provide a label to be used in the Report Summary.

Display Title		
Dimension	Dimension field	Select a dimension field from the report to use as the categories in the donut.
Metric	Metric field	Select a metric field from the report to use as the size of the segments in the donut.
Colour	HEX code	Define a colour to use in the donut - shades of this one colour will be applied to segments.
Max Segments	Text Entry	Define the number of segments displayed in the donut before the 'other' segment. As this is a summary chart 1-3 are recommended, not larger.

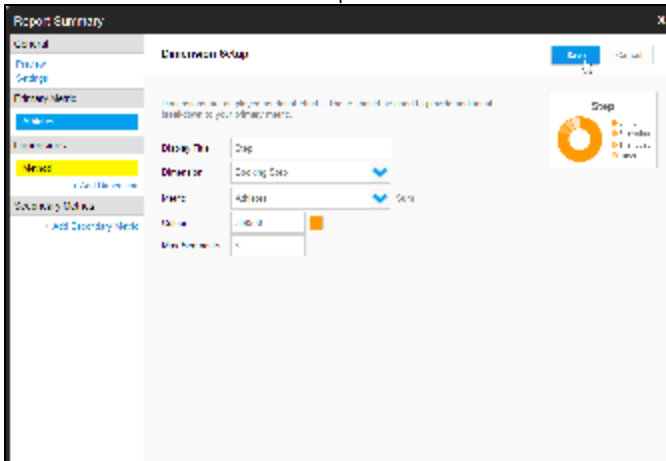
Once populated, the builder will display a preview of the summary on the top right of the screen.



- Click **Save** to keep your selections and continue building your Report Summary.



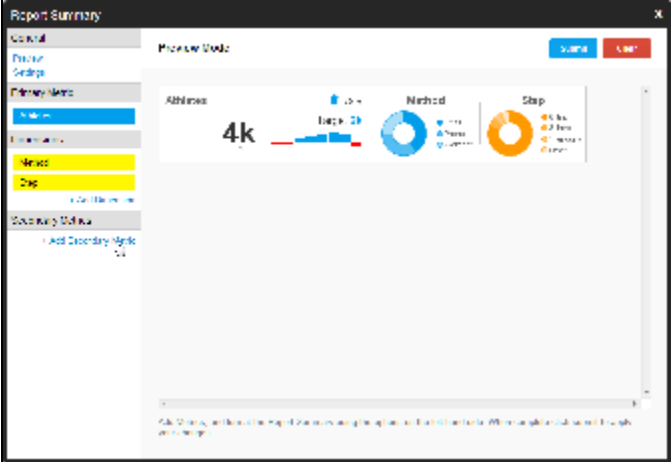
- You can add several dimensions if required.



Secondary Metric

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In order to provide additional metric information to the Report Summary you are able to define Secondary Metrics. These don't display as much information as the Primary Metric.

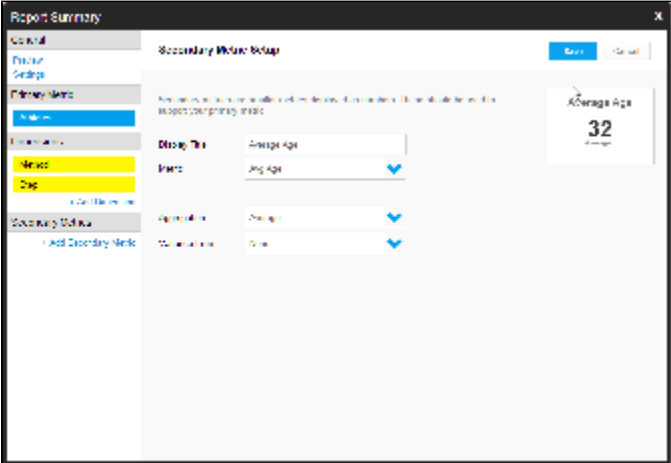
- 1. Click on the + Add Secondary Metric link on the left hand side of the builder



- 2. Define the options used to build the summary display.

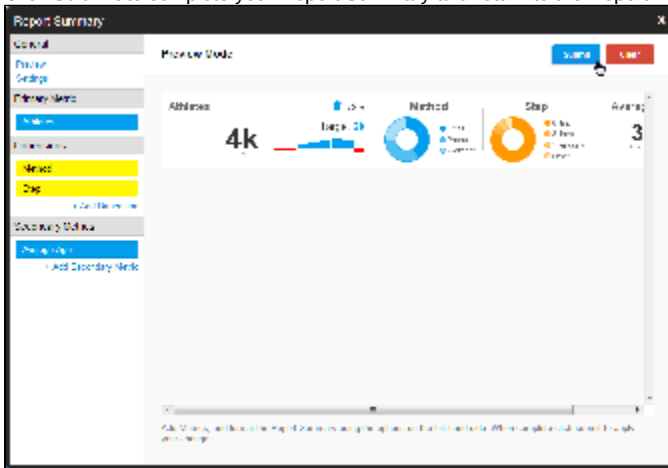
Option	Possible Values	Description
Display Title	Text Entry	Provide a label to be used in the Report Summary. This does not have to be the same as the Column Name.
Metric	Metric fields	Select the metric field you wish to assign as the Primary Metric.
Aggregation	% Change, Average, Change, Count, Count Distinct, Maximum, Minimum, Sum	Select the aggregation you wish to apply to the metric. The Summary is going to look at this figure as a whole, not split by any categories, so it's important to select the correct aggregation.
Variance From	None or Metric fields	Define the Target as a field, or don't use a target at all.
Desired Variance	Above, Below, Range	Define where you want the variance to fall if you've defined a target. For example, do you want your metric to be above the target?

Once populated, the builder will display a preview of the summary on the top right of the screen.



Click **Save** to keep your selections and continue building your Report Summary.

3. Click **Submit** to complete your Report Summary and return to the Report Preview page.



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