

Drill Down Reports

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Overview

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Yellowfin has drill down functionality available for its reports and charts. This provides you with the option to drill down logical hierarchies within your data, viewing data from different angles and levels.

Drill down allows you step down a logical hierarchy within your data by re-calculating your report each time you move down a hierarchy.

For example you may be looking at a sales report by region. To determine why one region is outperforming another you can click on the region to see the various countries performances within that region.

Each time you drill down the value that you selected becomes a filter for the next level down. You will not see all countries when drill down – just the countries for the region you selected.

Example

For example you may be able to drill from

Year > Month > Date.

When you click on the link to the report will refresh with detail updated.

Year ▾	Athletes ▾	Avg Age ▾	Invoiced ▾
2007	127	33	\$17,633,473
2008	138	29	\$8,611,470
2009	563	33	\$11,012,244
2010	630	31	\$81,690,100
2011	795	32	\$158,353,519
2012	848	33	\$152,912,577
2013	736	34	\$28,199,351
2014	50	24	\$12,522,605

For example if your report contained region and you clicked on Europe the refreshed report will display all countries within Europe.

Start > Year: 2013

Month ▾	Athletes ▾	Avg Age ▾	Invoiced ▾
January	152	31	\$10,944,609
February	53	29	\$1,622,819
March	30	26	\$293,740
April	13	50	\$272,993
May	20	44	\$395,144
June	26	40	\$279,145
July	31	40	\$265,457
August	28	43	\$191,626
September	49	33	\$487,506
October	75	38	\$945,045
November	160	32	\$7,434,379
December	99	31	\$5,066,889

Initial Setup

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When your administrator sets up your view they can define dimension hierarchies. These hierarchies are built to enable you to explore your data in a way that is appropriate for your business.

In the example above your administrator would have set the view up to build a time based hierarchy.

Year drills to > **Month** drills to > **Date**

Having done this Yellowfin re-calculates your report data as you move down the hierarchy. The common areas for which hierarchies are created include:

- **Geography** (Region, Country, State)
- **Date** (Year, Quarter, Month, Week, Date).
- **Organisation Structure** (Division, Line of Business, Cost Centre)
- **Customer** (Country of Origin, Region, City, Customer).
- **Product** (Category, Line, Product Code)

See [Drill Down Hierarchies](#) for more information.



Drilling is only enabled for dimension and date fields.

Using Drill Down

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Analysis Style

There are four **Analysis Styles**; **Drill Down**, **Drill Anywhere**, **Drill Through**, and **Co-Display**. The **Drill** styles cannot be used simultaneously used on a report as the user action looks similar and this could lead to confusion for a user that has not created the report.

To select the type of analysis you wish to apply click the **Drill Down** radio button on the **Analysis Style** panel of the **Data** step.

Analysis Style

☐

Co-Display

☐

No Drill

☒

Drill Down

☐

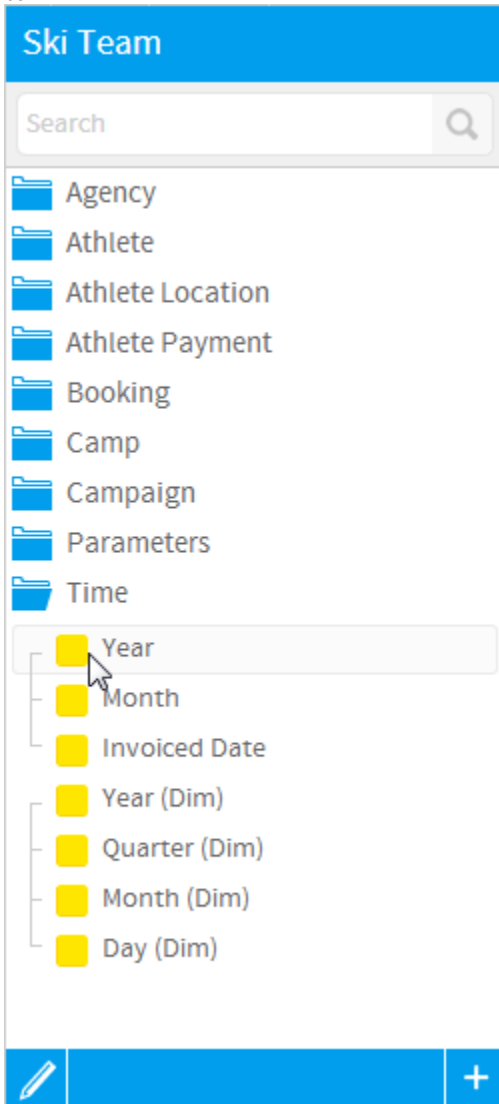
Drill Anywhere

☐

Drill Through

Add Drill Fields to your Report

1. Locate the fields that you wish to add to your report. All fields that are drill able will be identifiable by the line which joins them in the report field's box.



2. Select the level of the hierarchy that you wish to start your analysis from, generally this is the top level.
Note: you cannot add multiple fields from the same hierarchy onto a report – for example you cannot add Region and Country on the same report when using drill down – since you can drill from region to country.

Drill on Multiple Hierarchies

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You can add in data from multiple hierarchies to assist your report readers to drill down and across various hierarchies such as product and organisation hierarchies.

When adding in multiple hierarchies it is suggested to use a Crosstab report so that the data is presented in a way that is easier to read and understand.

In the example below you can drill down on either the **Year** or **Booking Method**.

Athletes	Year							
Media Category	2007	2008	2009	2010	2011	2012	2013	2014
Agent	0	14	40	33	42	66	27	0
Broadcast	0	0	60	87	78	76	51	4
HardCopy	56	42	266	152	316	329	249	18
Referral	1	6	41	45	32	63	44	3
WebView	70	76	156	313	327	314	365	25

Drilling Up

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When you run a report with drill down each time you drill into a level of detail the report is refreshed with new data. To drill up to the level you were previously at, for example from **Media** back to **Media Category**, use the breadcrumb located at the top of the table or chart.

[Start](#) > Media Category: HardCopy

Athletes	Year							
Media	2007	2008	2009	2010	2011	2012	2013	2014
DirectMail	1	0	84	26	83	77	119	9
MagazineAd	55	42	182	126	233	252	130	9

Reset Report

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If you have multiple drill down options or you have drilled down multiple levels of a hierarchy you can easily reset your report. This will display the data as it was before you began your drill down analysis.

To reset a report you can either click the **Reset Report** link located under the main navigation bar, or the **Start** link on the drill breadcrumb.

Report

Edit

Drill Down Sample

This report demonstrate's Drill Down functionality.

[Start](#) > Media Category: HardCopy

Athletes	Year							
Media	2007	2008	2009	2010	2011	2012	2013	2014
DirectMail	1	0	84	26	83	77	119	9
MagazineAd	55	42	182	126	233	252	130	9

Drilling on Charts

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Just as with tables you can also drill down on charts.

1. Place your cursor over the value you wish to drill on.
2. Click the area of the chart
3. The chart will be refreshed with new data.

Printing & Exporting Drill Results

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You can print or export data from your report as a PDF or CSV file whilst drilling down to maintain a copy of the results of your analysis. Whenever you print or export your report the data as displayed on the screen will be printed or exported.

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