

# Drag & Drop Builder

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## Overview

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The Drag and Drop Builder allows users to use a pre-defined data view to build their reports without having to worry about SQL. This is the default builder, so once you've started the New Report creation process, you won't have to select an advanced authoring option to proceed. From here you can start selecting the data set you wish to use for your report.

## Select View

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From here you will need to select a View on which to build your report. The main panel displays a list of available Views, while the search and advanced options above it allow you to filter the list. Once you have narrowed the View list down using the options outlined above, simply click on the desired View's name and you will proceed to the first step of the Report Building process, the [Data](#) page.

The screenshot shows a 'New Report' dialog box with a blue header and a close button. Below the header is a progress bar with two steps: 'Select View' (active, blue circle) and 'Analyse' (inactive, grey circle). To the right of the progress bar is a toggle switch for 'Advanced Authoring', which is currently turned off. The main content area is titled 'Select a view' and contains a search bar with a 'Less' button and a filter icon. Below the search bar are three dropdown menus: 'All Data Sources', 'All View Categories', and 'All View Types'. The main list displays a table of available views:

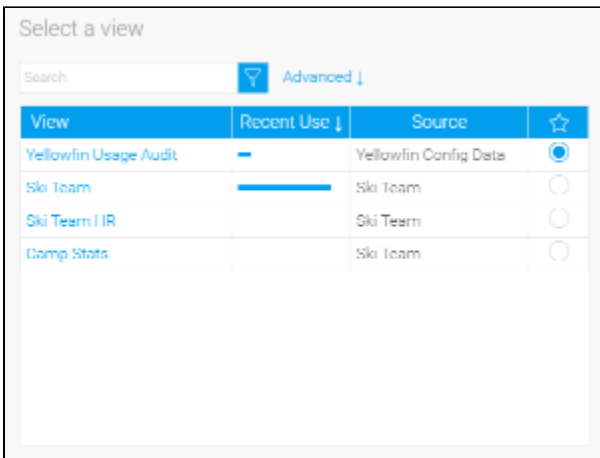
View	Recent Use ↓	Source	☆
Yellowfin Usage Audit	—	Yellowfin Config DB	<input checked="" type="radio"/>
Ski Team	—	Ski Team	<input type="radio"/>
Ski Team HR	—	Ski Team	<input type="radio"/>
Camp Stats	—	Ski Team	<input type="radio"/>

At the bottom of the dialog is a button labeled 'Not here? Create new' with a dropdown arrow.

## View List Functions

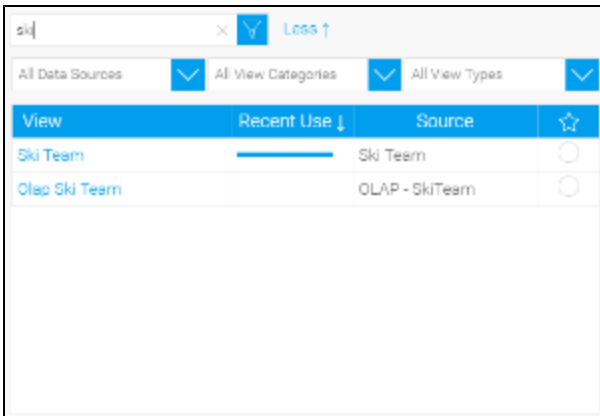
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When selecting the View you wish to base your report on, you have several tools available to you that help narrow down your options.



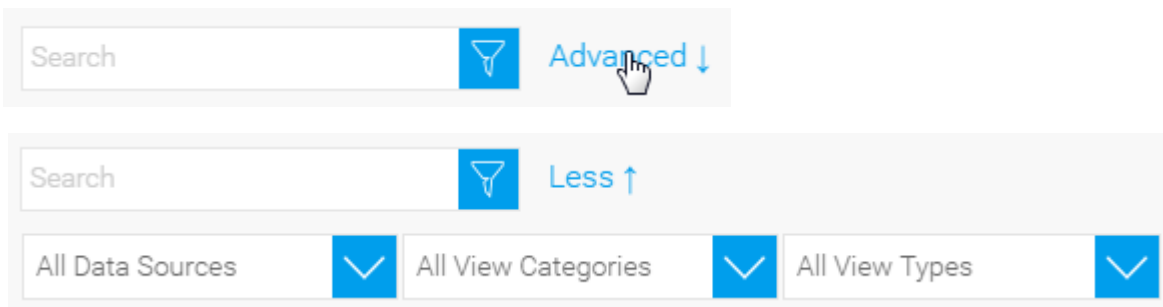
## Keyword Search

The search box allows you to restrict the list of views based on a keyword found in the view Name, Description, or Field.



## Advanced Filters

Clicking on the **Advanced** option next to the search box will display three filters which can be used to restrict the views listed:



1. **Data Sources** - this allows you to select an available data source connection, restricting the list of views to those based on this connection.
2. **View Categories** - this allows you to select an available view category, restricting the list of views to those stored within this category.
3. **View Types** - this allows you to select an available view type, restricting the list of views to those created using this type of builder.

## View Name

Hovering your mouse over the name of a view in the list will allow you to see a short description of the view. Clicking on the name will start the report creation process using that view.

View	Recent Use ↓	Source	☆
Yellowfin Usage Audit	—	Yellowfin Config Data	<input checked="" type="radio"/>
Ski Team	Ski Team	Ski Team	<input type="radio"/>
Ski Team H	This is a tutorial view for training and demo purposes. <a href="#">More Details</a>	Ski Team	<input type="radio"/>
Camp Stats		Ski Team	<input type="radio"/>

View Details

Hovering your mouse over the name of the view in the list will allow you to see a short description of the view, with the option to click on the **More Details** link.

View	Recent Use ↓	Source	☆
Yellowfin Usage Audit	—	Yellowfin Config Data	<input checked="" type="radio"/>
Ski Team	Ski Team	Ski Team	<input type="radio"/>
Ski Team H	This is a tutorial view for training and demo purposes. <a href="#">More Details</a>	Ski Team	<input type="radio"/>
Camp Stats		Ski Team	<input type="radio"/>

The **More Details** link displays the **View Information** lightbox, which contains a preview of all the fields available in the view, and their folders and descriptions.

View Information

×

Connection Details

Name:

Ski Team

Description:

Ski Team is the demonstration and tutorial database.

Type:

HSQLDB

View Details

Name:

Ski Team

Description:

This is a tutorial view for training and demo purposes.

View Fields

Agency

Agency Type

Agency Name

Data Type: Text

Description: Travel agency name.

Agency Region

Agency Country

Agency Demographic

Agency Geo Polygon

Agency Geo ISOCode

Athlete

Athlete ID

First Name

## Column Sorting

Clicking on the name of a column (View, Recent Use, and Source) will allow you to sort the view list by its contents, toggling ascending and descending order with each click.

View	Recent Use ↓	Source	☆
Yellowfin Usage Audit	—	Yellowfin Config Data	⦿
Ski Team	—————	Ski Team	○
Ski Team HR		Ski Team	○
Camp Stats		Ski Team	○

## Favourite

You can nominate one view as a favourite in the list, which ensures it always appears at the top of the list when you create a new report.

View	Recent Use ↓	Source	☆
Yellowfin Usage Audit	—	Yellowfin Config Data	<input checked="" type="radio"/>
Ski Team	————	Ski Team	<input type="radio"/>
Ski Team HR		Ski Team	<input type="radio"/>
Camp Stats		Ski Team	<input type="radio"/>


## Create Data Set

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The **Not here? Create new** button is available to help users add data to generate reports off if they don't already exist. If the user has the appropriate creation permissions, they have the option to create one or all of the following from this page if they can't find a suitable option for their report:

1. **New View** - this allows the user to create a new View for report building.
2. **New Source Connection** - this allows the user to create a new database connection. This could be to base a new View on, for use with a Freehand SQL report, or to create a writable source for CSV Import.
3. **Load CSV** - this allows the user to import the contents of a CSV file for use in report building.

New View
New Source Connection
Load CSV

Not here? Create new


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