Creating a Report

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Overview

Creating a Report#top

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

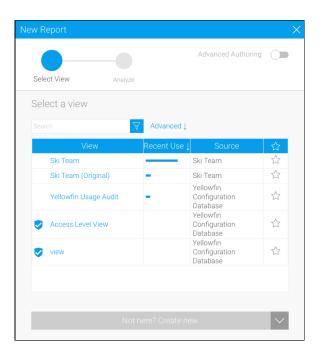
Creating a Report#top

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

1. Start the Report creation process by Left Side Nav Top Right Toolbar using one of these methods: (with Left Side Navigation enabled) • Left Side Nav - open the left side navigation panel, Dashboard Create Browse Administration click on Create, select the + Report option Report Ф Report d Report Report 5 Dashboard Tab • Top Right Button -KPI Dashboard View Dashboard Tab click on the create View Data Source button, select the Rep Data Source Storyboard Storyboard ort option. Storyboard Discussion Discussion Discussion Task View • Toolbar - click on the Create link in the Data Source toolbar, select the Report option. Task

You will now see the **New Report** lightb ox.

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



Data

Creating a Report#top

This will walk you through building a basic report.

1. 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.

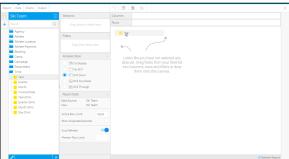
m		-		Columns	
ttt	Ski Team	0	Sections		
÷				Rows	
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			Report Data		
			Data Source: Ski Team View: Ski Team		
			Active Row Limit: 10000		
			Show Duplicate Records		
			Auto Refresh:		
			Preview Ross Limit:		
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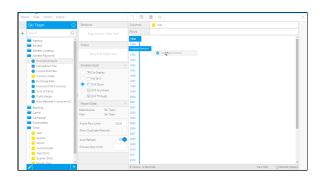
2. On the left you will see a list of folders, expand the **Time** folder in order to access time related fields.

3. Drag and drop the **Year** field into the preview area, as pictured here.

You could also drag it directly into the **C** olumn 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 categor y and drag the Invoiced Amount field next to the Year field in either the Colu mns or Preview area.





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5. Expand the Athlete category and drag the Athlete ID field between the Y ear and Sum Invoiced Amount fields.

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

t Data Charts Output		⊃ 8 B			
	Sections	Columns	Year 🗧 At	friete ID 🛛 📵 Sum Invoiced Amou.	
Search Q	Drag section fields here	Rows			
Agency			P Sum invoicest Amount	-	
Athlete	Filters	2009 9,000	Athlata ID	_	
Athlete ID		2009 9,092	Aggregation	None	
First Name		2009 9,100	Sort	# Count	
East Name	Analysis Style	2009 9,205	Format		
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Date of Birth	CE Co-Display	2029 9,474	Advanced Punction		
Age at Camp	🔿 🖂 No Dell	2022 9.478	Group Data		
Age Group at Camp	💌 🔄 Dnil Down	2000 9,630	Totals		
Athlete Counter	🔿 🔙 Drill Anywhere	2009 9,635	Add Filter		
Eroken Bone Group	🕘 🔄 Drill Through	2000 9.754			
Athlete Location	Report Data	2009 9,810	Hide Field		
Athlete Payment	Data Source: Ski Team	2000 9,841	Delete		
Invoiced Amount	View: Ski Team Active Row Limit: 10000 Show Duplicate Records:	2009 9,857	\$22.4		
Cancellation Fee Invoice Estimate		2009 9,872	\$503,4		
Ourrency Code		2029 9,897	\$9,7		
Eschange Rate		2009 9,904	90.7		
Involced (Pref Currency)	Auto Refresh:	2022 9,914	55.7		
 Cost of Camp 	-	2009 9,915	\$9.7		
Profit Margin	Preview Row Limit	2009 9,933	\$0.7	21	
Days Between Invoice and C		2009 9,938	\$24.9	Ke l	
Booking		2022 9.922	50.7	21	

Your report should now look like the on pictured here.

7. Click on the **Column Formatting** ico n in the main Formatting bar in order to open the formatting menu. Here, you can apply conditional formatting to the columns.

5	i ty 3=	
2016	50	\$12,522,605
2015	529	\$28,199,351
2014	608	\$152,912,577
2013	589	\$158,353,519
2012	483	\$81,690,100
2011	421	\$11,012,244
2010	138	\$8,611,470
2009	127	\$17,633,473

Year Vount Distinct Athlete ID Vound Sum Invoiced Amount

Columns	Column Formatting
Rows	

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

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	Column Formatting	×
Columns	42	
Year	Please select a field from the list on the left.	
Count Distinct Athlete ID	1	
Sum Invoiced Amount		
	<i>+1</i>	

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

	2 団 国 単	
Report Fields	Column Formatting - Athletes	
Columns	Display	
Year	Display	
Athletes	Display Athletes Athletes	
Sum Invoiced Amount	Format Numeric Numeric	\sim
	Decimal Places Define the number of decimal places to be displayed.	0
	Prefix Prefix Define text to display before the field value.	
	Suffix Define text to display after the field value.	
	Rounding Define the rounding you wish to apply to the field.	und Half Up 🔽
	Thousand Separator Display thousand separators in the numeric value.	-
	Bracket Negatives Display negative values without brackets.	0
	Show Field Display the column in the table output.	-
	Suppress Duplicates Display duplicate values in the table output.	0

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

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

	Column Formatting - Sum Invoiced Amount			
Columns	Display			
Year	Display	Invoiced		
Athletes	Define the title of the column.	invoiced		
Sum Invoiced Amount	Format Display the value as a decimal.	Numeric		~
	Decimal Places Define the number of decimal places to be displayed.		0	
	Prefix Define text to display before the field value.		S	
	Suffix Define text to display after the field value.			
	Rounding Define the rounding you wish to apply to the field.		Round Half Up	~
	Thousand Separator Display thousand separators in the numeric value.		•	
	Bracket Negatives Display negative values without brackets.			
	Show Field Display the column in the table output.		•	
	Suppress Duplicates			5
	Display duplicate values in the table output.			

Your report should now look like the one pictured here.

Year 👻	Athletes 💌	Invoiced 💌
2009	127	\$17,633,473
2010	138	\$8,611,470
2011	421	\$11,012,244
2012	483	\$81,690,100
2013	589	\$158,353,519
2014	608	\$152,912,577
2015	529	\$28,199,351
2016	50	\$12,522,605

Charts

Creating a Report#top

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 s tep.

 New Data

 Image: Data Server Server

Charts

Design

2. Drag the Year field into the Horizont al Axis component of the Auto Chart builder.

3. Drag the **Invoiced** field into the **Verti** cal 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.

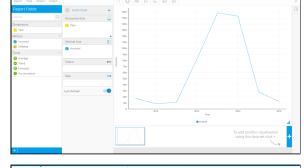
5. Locate the **Pie** section and choose a basic **Pie Chart**.

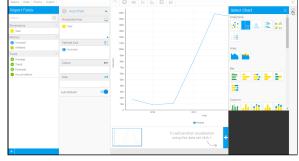
Your chart will now change to a Pie.

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

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

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



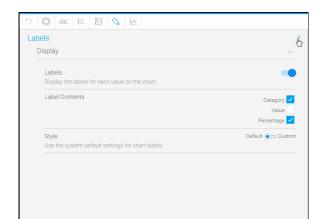




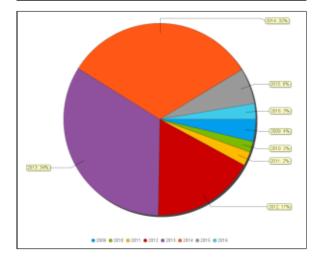
Report

Data





Your chart should now look like the one pictured here.



Design

Creating a Report#top

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

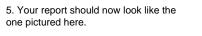
2. Click on the **Publish** link, or the **Repo rt** link in the main navigation bar and select the **Save** option.

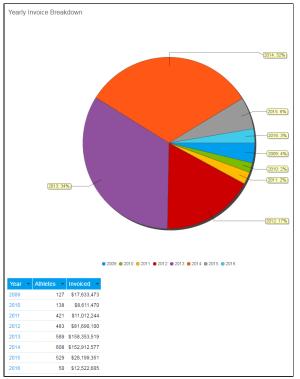
3. Define a Name and Description for the report, then provide Category and S ub Category options for storage.

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



Save R	eport				\times
Details	Distribution Settings	Settings	Refresh		
Yearl	y Invoice Breakdown				
Give t	his report a great descr	iption.			
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Further Information

Creating a Report#top

For more information around the creation of Reports in Yellowfin see the Reports Overview section of the wiki.

Creating a Report#top