

Creating a Report

- [Overview](#)
- [Create](#)
- [Data](#)
- [Charts](#)
- [Design](#)
- [Further Information](#)

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.

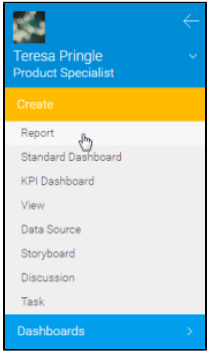
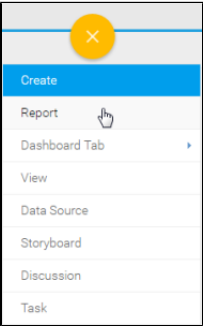
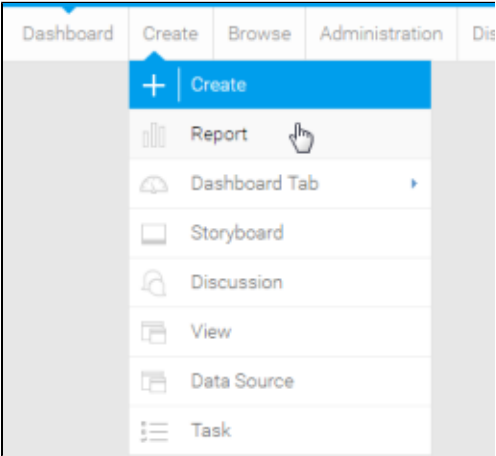
Create

Creating a Report#top

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

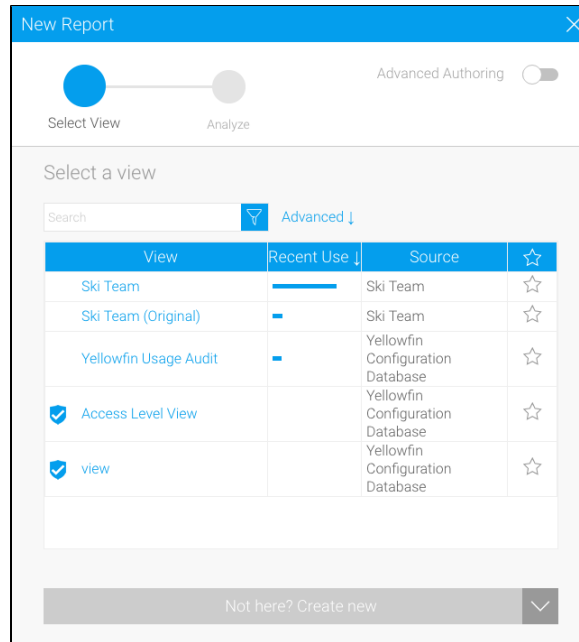
1. Start the **Report** creation process by using one of these methods:

- **Left Side Nav** - open the left side navigation panel, click on Create, select the Report option
- **Top Right Button** - click on the create button, select the Report option.
- **Toolbar** - click on the Create link in the toolbar, select the Report option.

Left Side Nav	Top Right (with Left Side Navigation enabled)	Toolbar
		

You will now see the **New Report** lightbox.

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

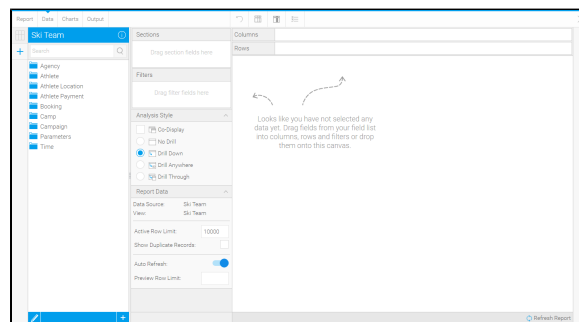


Data

Creating a Report#top

This will walk you through building a basic report.

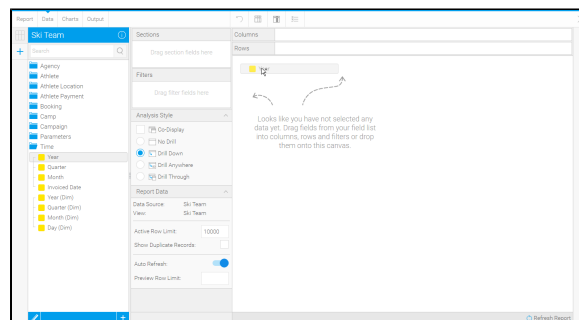
1. You will now be on the **Data** step of the builder, where you will define the fields used in your report, format them, and define any filters, sections and other advanced options for your report.



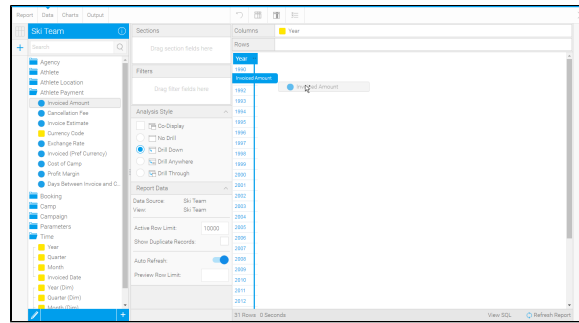
2. On the left you will see a list of folders, expand the **Time** folder in order to access time related fields.

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

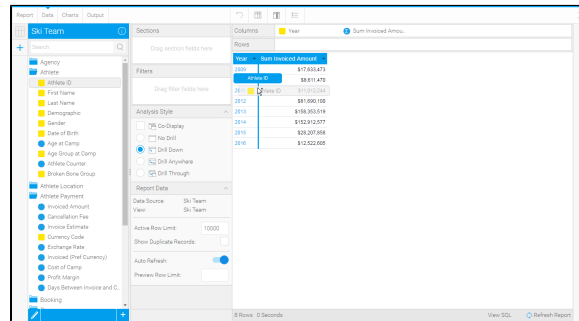
You could also drag it directly into the **C column** or **Rows** list if you prefer. Dragging into the Columns list creates a Year column that goes down the page, where the Rows creates a Year row that goes across the page.



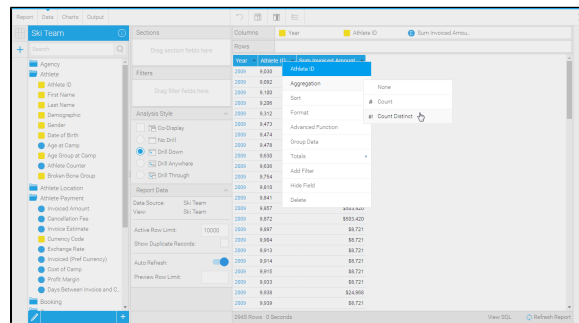
4. Expand the **Athlete Payment** category and drag the **Invoiced Amount** field next to the Year field in either the **Columns** or **Preview** area.



5. Expand the **Athlete** category and drag the **Athlete ID** field between the **Year** and **Sum Invoiced Amount** fields.



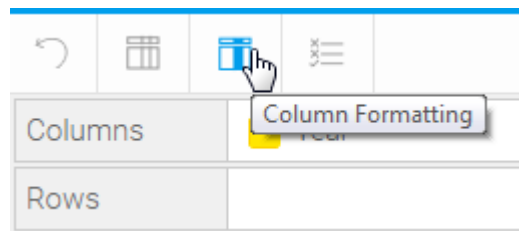
6. Click on the drop down menu on the **Athlete ID** field and set the **Aggregation** to **Count Distinct**.



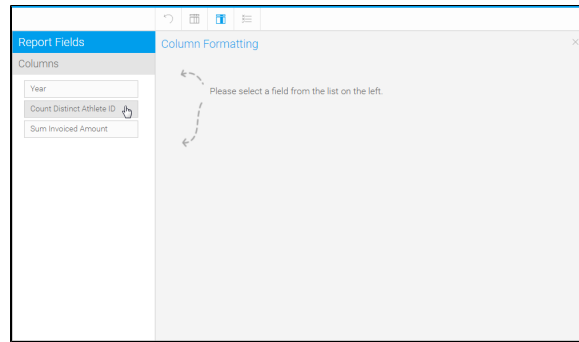
Your report should now look like the on pictured here.

Year	Count Distinct Athlete ID	Sum Invoiced Amount
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

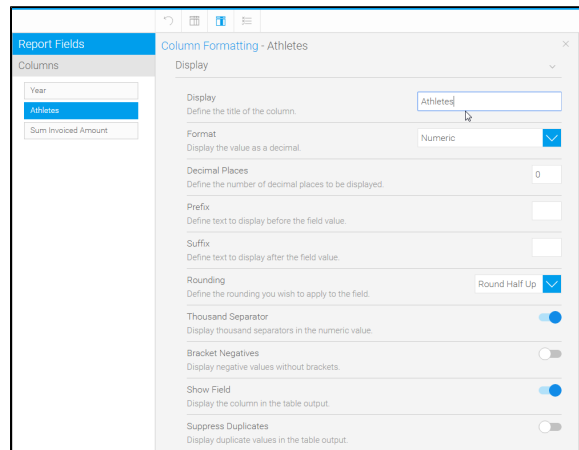
7. Click on the **Column Formatting** icon in the main Formatting bar in order to open the formatting menu. Here, you can apply **conditional formatting** to the columns.



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

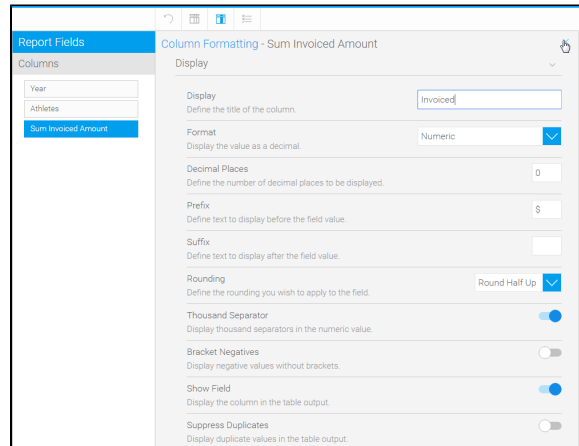


9. Change the **Display** name of the field to **Athletes**.



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

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



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
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2016	50	\$12,522,605

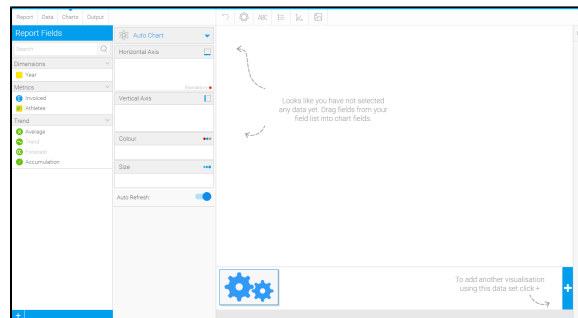
Charts

Creating a Report#top

1. Click on the **Charts** link in the main navigation bar in order to progress to the **Chart Builder** step.

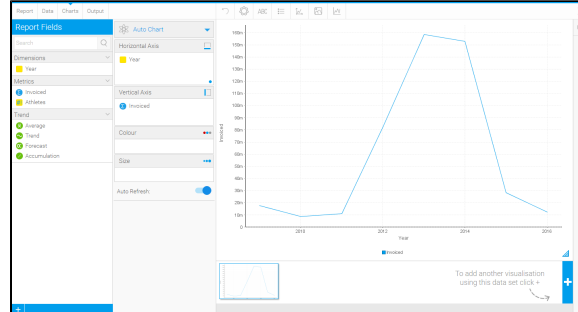


You will now have a list of fields on the left side of the builder that are available from the table you defined on the Data step.



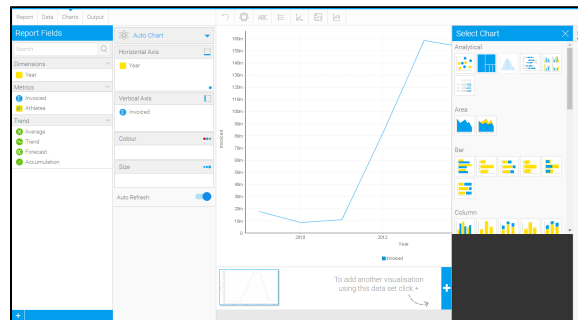
2. Drag the **Year** field into the **Horizontal Axis** component of the **Auto Chart** builder.

3. Drag the **Invoiced** field into the **Vertical Axis** component.



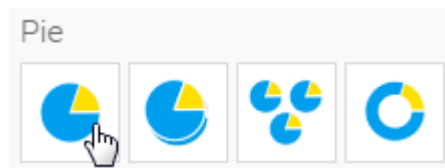
You will now have generated a line chart. In order to change the chart type manually, you will need to switch from the **Auto Chart** builder to a specific type.

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.

Labels

Display

Labels
Display the labels for each value on the chart.

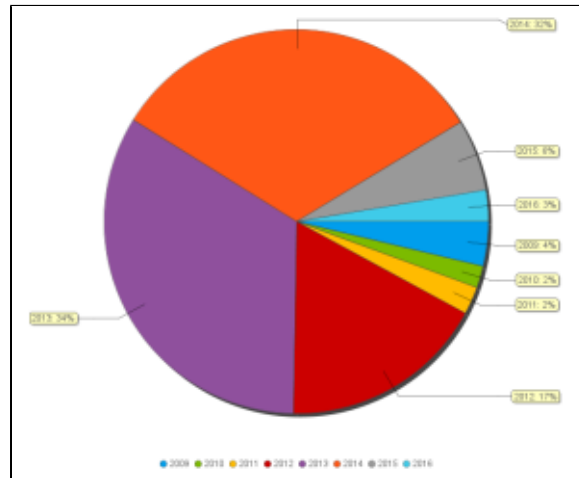
Label Contents

Category ☒
Value ☐
Percentage ☒

Style
Use the system default settings for chart labels.

Default ☒ Custom

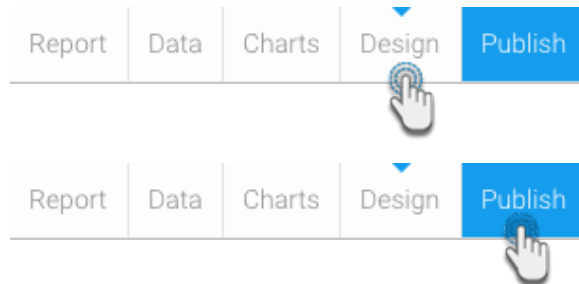
Your chart should now look like the one pictured here.



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 **Report** link in the main navigation bar and select the **Save** option.
3. Define a **Name** and **Description** for the report, then provide **Category** and **Sub Category** options for storage.
4. Click on the **Save** button to save your report and activate it for consumer use.



Save Report

Details

Distribution Settings

Settings

Refresh

Yearly Invoice Breakdown

Give this report a great description.

Tutorial

Athletes

+ Add tags

Report Access

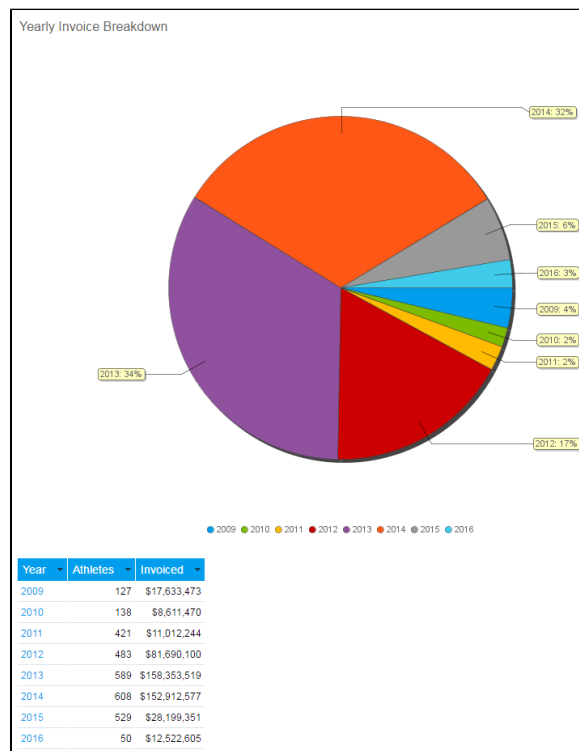
All users with Folder access will be able to view this report.

Public

Private

Save

5. Your report should now look like the one pictured here.



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