Report Builder

- Overview
- Report Builder Steps
  - Create
  - Data
  - Charts
  - Related Reports
  - Output

Overview

top
The drag and drop report builder assists you to create both simple and sophisticated analytical reports. The steps available through the builder are determined by some of the options you choose along the way, including:

- The type of builder you use
- The data source you build on
- The fields you use in the report, and the layout defined by them
- The filters and/or sections you add to the report
- The addition of Related Reports, Drill Functionality, and Sub Queries

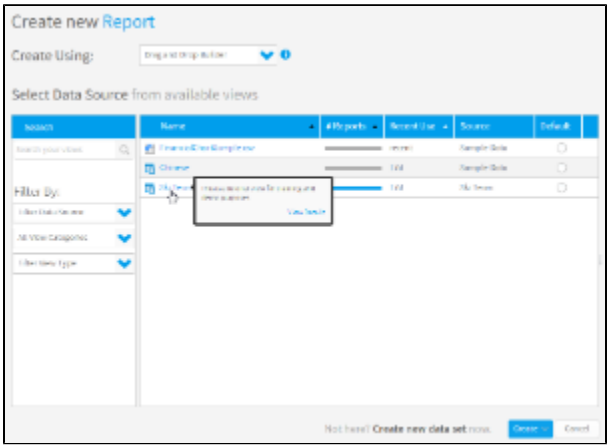
Report Builder Steps

top
Included in the report builder are a number of possible steps:

1. Create
2. Data
3. Charts
4. Related Reports
5. Output

Create

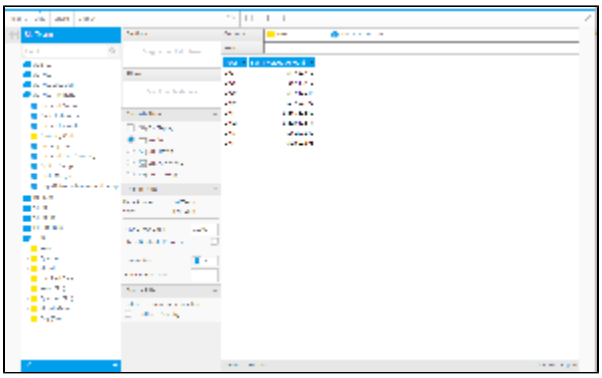
The first step in building any report is selecting the type of report you wish to run and the data source required. Your organisation may have many views and data sources so selecting the correct one is critical prior to building your report.



> *See Initialise Report for more information.*

Data

The report data section allows you to define the look and feel of your report, including the fields to be displayed, the filters to be used, and whether a chart or drill through should be displayed. Select the items from the view that you wish to include in your report and drag them into the appropriate section of the screen.

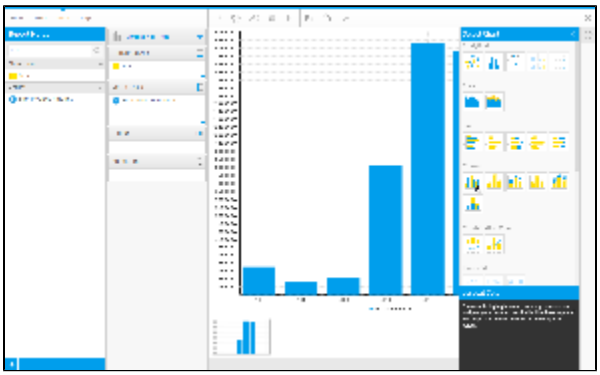


Note: depending on the builder you select, this option may be replaced with alternatives such as; CSV, SQL, Jasper, and BIRT.

> *See Report Data for more information.*

Charts

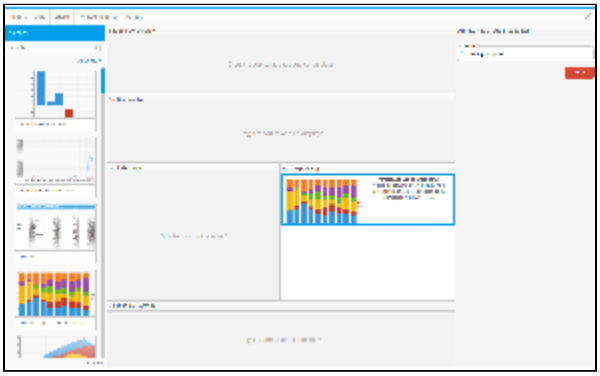
The Charts page allows you to build visualisations based on the table created in the Data step.



> *See Charts for more information.*

Related Reports

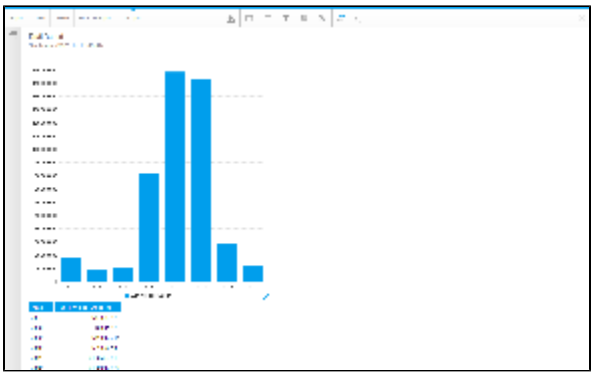
Create relationships between the draft report and other content using Drill Through and Co-Display reports.



> *See Related Reports for more information.*

Output

The Output page allows you to format the report, set up a multi-chart canvas, and other functions.



> *See **Output** for more information.*

top