

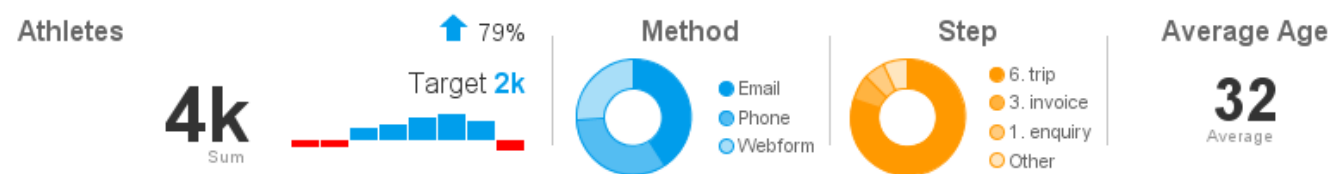
# Report Summary

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## Overview

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Report Summaries allow the user to build summary level KPI and chart displays into their report. This allows for a row of summary information to be displayed along with a very detailed report, providing to levels of analysis.



In order to create a Report Summary you will need to be on the Output step of the Report Builder, while it's in draft mode. From here you will find a Summary button on the main formatting toolbar.



## Exceptions

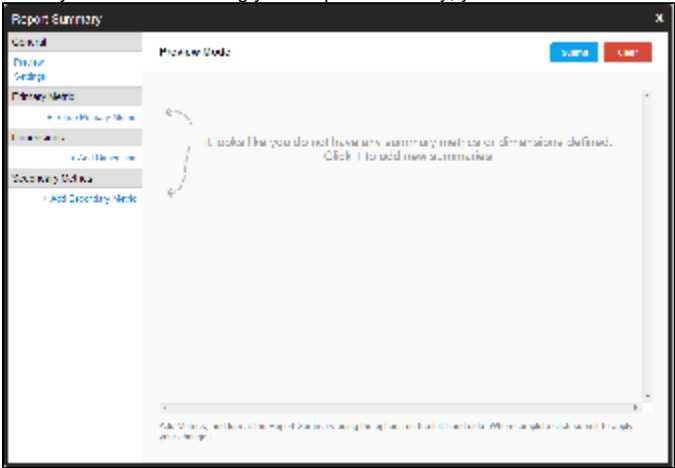
Report Summaries cannot be used in the following cases:

- Drill Down Reports (the summary will display before the report has been drilled into)
- Drill Anywhere Reports (the summary will display before the report has been drilled into)
- Section Reports
- KPI Reports
- Visible Series Selection Charts
- Time Series Charts with Date Sliders

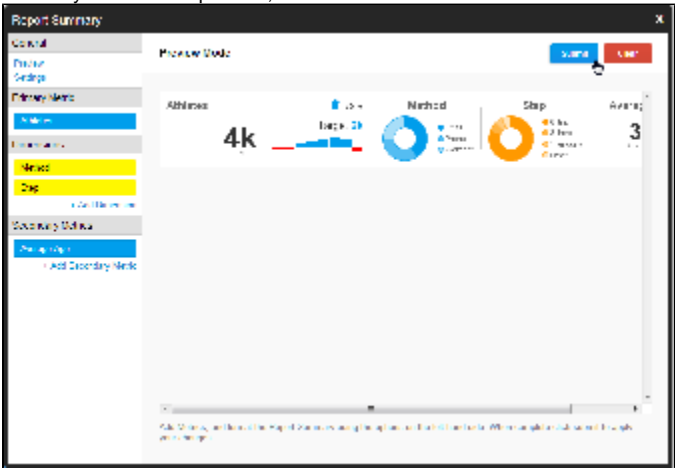
## Preview

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When you first start building your Report Summary, you will be taken to the following lightbox:



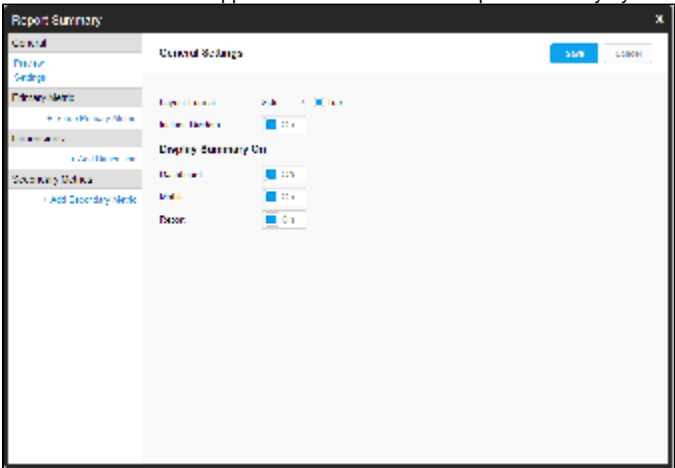
Here you are shown all the building options down the left of the page, with the preview pane on the right currently empty. As soon as you build summary content you will see a preview, as below.



Settings

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You can customise the appearance and use of the Report Summary by clicking on the **Settings** option on the left of the builder.



| Setting          | Options    | Description   |
|------------------|------------|---|
| Layout Format    | Side / Top | Display the summary either at the top or side of the chart. If the report is table only the display will always be 'top'. |
| Include Dividers | Off / On   | Display dividers between each of the elements in the Report Summary (Primary Metric, Dimensions, Secondary Metrics).      |
|                  |            |   |

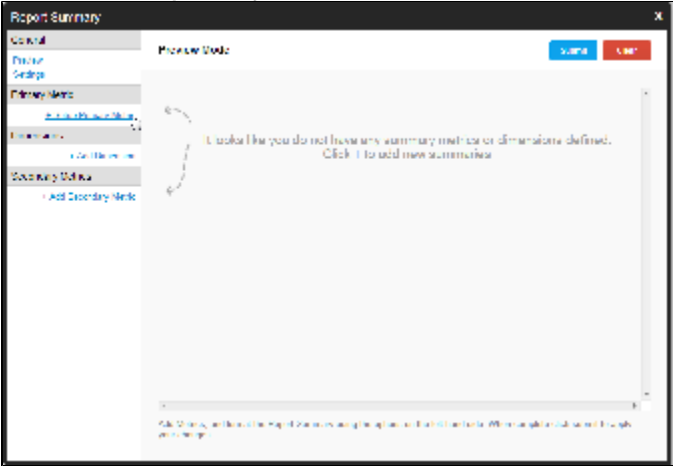
|                  |          |   |
|------------------|----------|---|
| <b>Dashboard</b> | Off / On | Make the Report Summary available for display on the Dashboard. You will still need to enable it when creating the Dashboard Tab. |
| <b>Mobile</b>    | Off / On | Make the Report Summary available for display on mobile devices.  |
| <b>Report</b>    | Off / On | Make the Report Summary available for display on the Report Preview page (away from the dashboard).                               |

## Primary Metric

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The first thing you need to do, when creating your Report Summary, is define the Primary Metric of the report. This is the main measurement in the report.

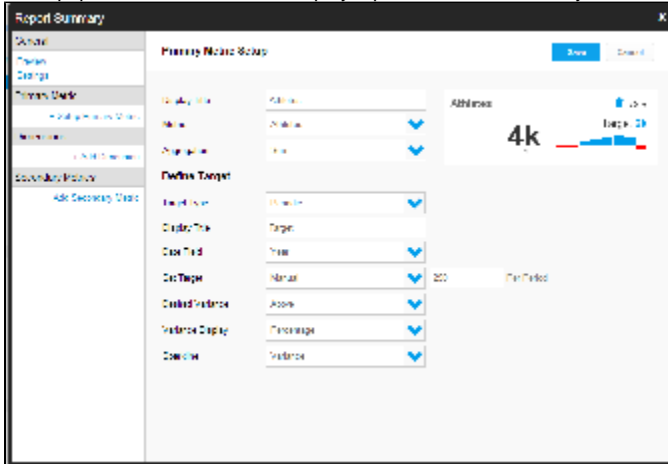
1. Click on the **+ Setup Primary Metric** link on the left hand side of the builder.



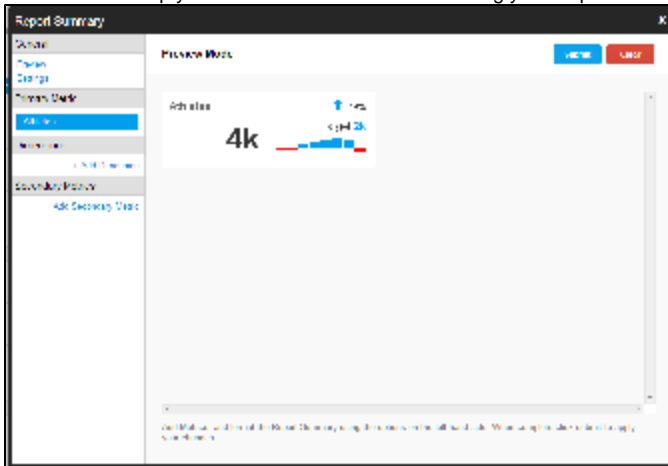
2. Define the options used to build the summary display. Depending on the Target Type settings you select, you may not have all of the options listed here.

| Option                  | Possible Values   | Description   |
|-------------------------|---|---|
| <b>Display Title</b>    | Text Entry  | Provide a label to be used in the Report Summary. This does not have to be the same as the Column Name.   |
| <b>Metric</b>           | Metric fields   | Select the metric field you wish to assign as the Primary Metric.   |
| <b>Aggregation</b>      | % Change, Average, Change, Count, Count Distinct, Maximum, Minimum, Sum | Select the aggregation you wish to apply to the metric. The Summary is going to look at this figure as a whole, not split by any categories, so it's important to select the correct aggregation. |
| <b>Target Type</b>      | None, Periodic, Total   | If you wish to compare your Primary Metric value to that of a target or budget, define here.  |
| <b>Display Title</b>    | Text Entry  | Provide a label to be used in the Report Summary for the target.  |
| <b>Date Field</b>       | Date field  | If you have selected a Periodic Target you will need to select a date field to define the periods.  |
| <b>Set Target</b>       | Manual or Metric fields   | Define the Target as a field, or a user defined value   |
| <b>Desired Variance</b> | Above, Below, Range   | Define where you want the variance to fall. For example, do you want your metric to be <b>above</b> the target?   |
| <b>Variance Display</b> | None, Actual, Percentage  | Select the display of the variance.   |
| <b>Sparkline</b>        | None, Actual, Variance  | Select the display of the variance for each period.   |

Once populated, the builder will display a preview of the summary on the top right of the screen.



- Click **Save** to keep your selections and continue building your Report Summary.

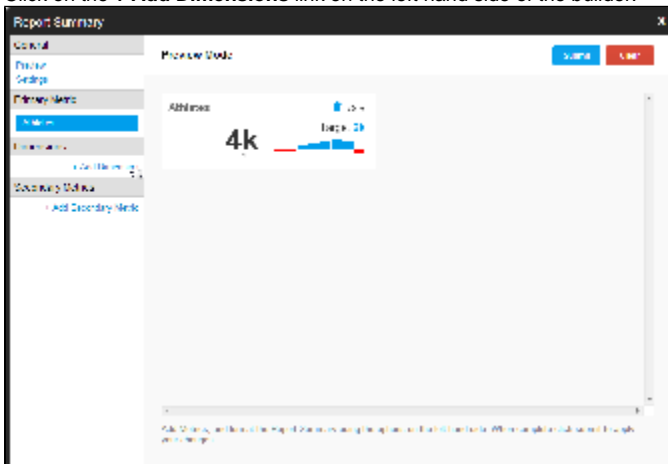


## Dimensions

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In order to provide categorical summaries you can define Dimensions for display in your Report Summary. These display a selected metric, split into categorical values by a dimension field, displayed on a donut chart.

- Click on the **+ Add Dimensions** link on the left hand side of the builder.

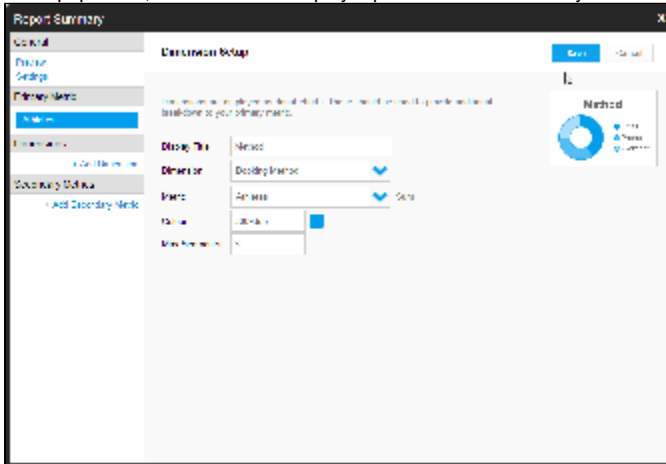


- Define the options used to build the summary display.

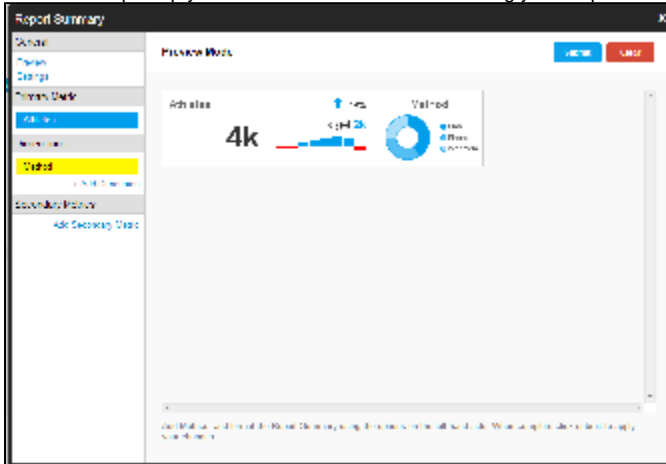
| Option | Possible Values | Description                                       |
|--------|-----------------|---|
|        | Text Entry      | Provide a label to be used in the Report Summary. |

|                      |                 |  |
|----------------------|-----------------|--|
| <b>Display Title</b> |                 |  |
| <b>Dimension</b>     | Dimension field | Select a dimension field from the report to use as the categories in the donut.  |
| <b>Metric</b>        | Metric field    | Select a metric field from the report to use as the size of the segments in the donut.   |
| <b>Colour</b>        | HEX code        | Define a colour to use in the donut - shades of this one colour will be applied to segments.   |
| <b>Max Segments</b>  | Text Entry      | Define the number of segments displayed in the donut before the 'other' segment. As this is a summary chart 1-3 are recommended, not larger. |

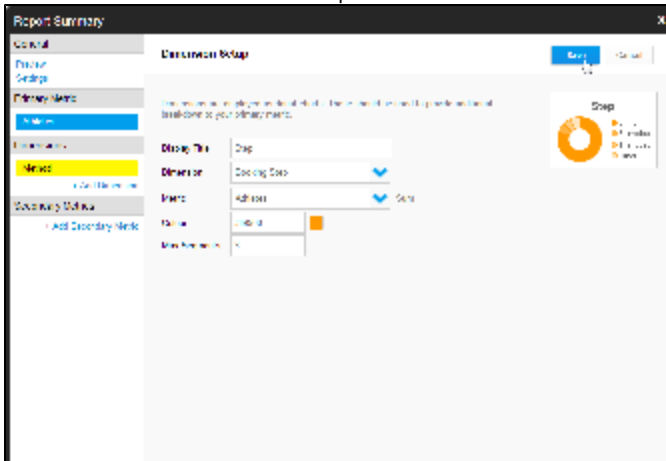
Once populated, the builder will display a preview of the summary on the top right of the screen.



- Click **Save** to keep your selections and continue building your Report Summary.



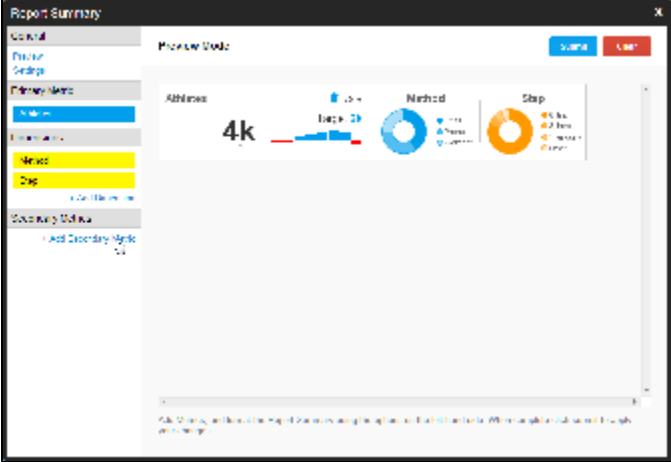
- You can add several dimensions if required.



# Secondary Metric

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In order to provide additional metric information to the Report Summary you are able to define Secondary Metrics. These don't display as much information as the Primary Metric.

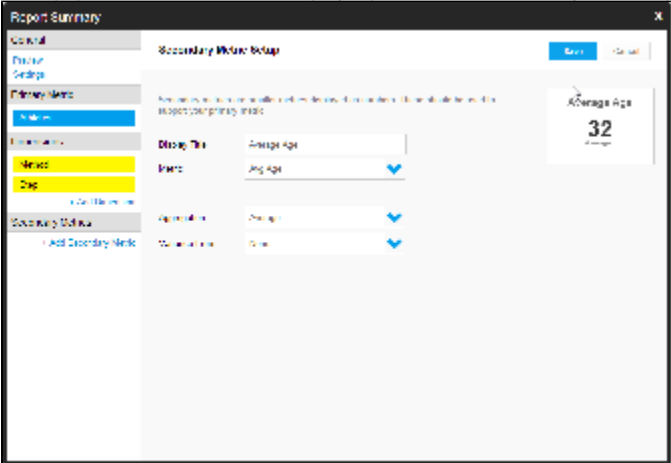
- 1. Click on the + Add Secondary Metric link on the left hand side of the builder



- 2. Define the options used to build the summary display.

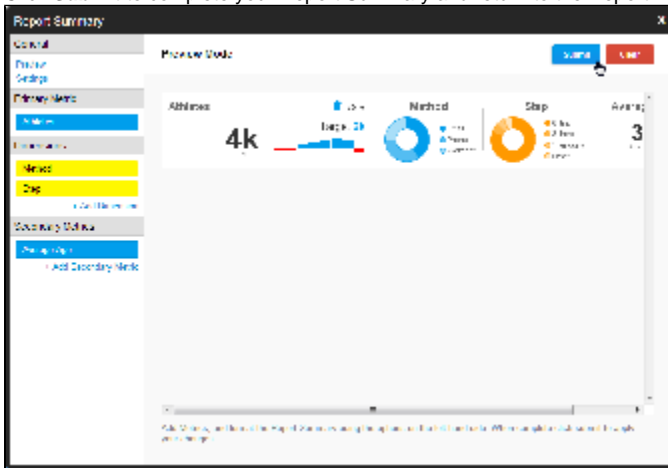
| Option           | Possible Values   | Description   |
|------------------|---|---|
| Display Title    | Text Entry  | Provide a label to be used in the Report Summary. This does not have to be the same as the Column Name.   |
| Metric           | Metric fields   | Select the metric field you wish to assign as the Primary Metric.   |
| Aggregation      | % Change, Average, Change, Count, Count Distinct, Maximum, Minimum, Sum | Select the aggregation you wish to apply to the metric. The Summary is going to look at this figure as a whole, not split by any categories, so it's important to select the correct aggregation. |
| Variance From    | None or Metric fields   | Define the Target as a field, or don't use a target at all.   |
| Desired Variance | Above, Below, Range   | Define where you want the variance to fall if you've defined a target. For example, do you want your metric to be <b>above</b> the target?  |

Once populated, the builder will display a preview of the summary on the top right of the screen.



Click **Save** to keep your selections and continue building your Report Summary.

3. Click **Submit** to complete your Report Summary and return to the Report Preview page.



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