Creating a Report

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Overview

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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

top

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

 Start the Report creation process by using one of these methods: 	Left Side Nav	Top Right (with Left Side Navigation	Toolbar				
 Left Side Nav - open the left side navigation panel, click on Create, select the Report option 	Create Create	Create Report	Dashboard	Create	Browse eate	Administration	Dis
 Top Right Button - click on the create button, select the Rep ort option. 	Report Standard Dashboard KPI Dashboard View Data Source Storyboard Discussion Task	Dashboard Tab View Data Source Storyboard Discussion			eport h ashboard Ta oryboard scussion	,	
 Toolbar - click on the Create link in the toolbar, select the Report option. 	Dashboarda >	Task			ew ata Source ask		

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

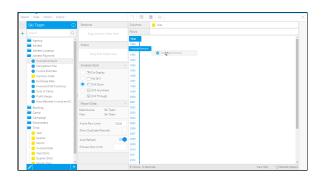
New Report			×
	Advance	d Authoring	
Select View Anal	yse		
Select a view			
	Advanced ↓		
View	Recent Use J Sour	ce	公
Ski Team	Ski Team		0
New Ski Team	This is a tutorial view for training	ng am	
Historical Records	and demo purposes.		
	More Det	ails	
N			\sim

Data

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.	april Sate Cave Guya Sate Cave Guya Sate Cave Guya Anno Cave Anno Cave Anno Cave Cav	Bectors Dag settles helds here Filter Dig Star felds here Dig Star felds here Dig Star felds here Dig Dag Dig	Colorent Reve	
2. On the left you will see a list of folders, expand the Time folder in order to access time related fields.	teent Date Charts Output Ski Team On Approv Annice Annice	Sections Drag section fields here Filters	County Res	C Refreah P
3. Drag and drop the Year field into the preview area, as pictured here.	Afflicte Payment. Booking Carrop Carropaign Pavameters Time Year	Analysis Style ^ CoChaplay CoChaplay Chill Down	Looks like you have not selected any data yet: fang felds from your field as the control the canves.	
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.	Marie Marie Vire (Dm) Aurier (Dm) Marie (Dm) Dry (Dm)	Construction C		© Refresh F

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**.

Agency 2			9.000	Athete D				
Athlete	Filters	2009			-			
Arhiete ID		2009	9,092	Aggregation		None		
First Name		2009	9,205	Sort		Count		
Last Name	Analysis Style		9,312	Format				
Demographic Gender		2009	9,473		81	Count Distinct		
Gender Date of Birth	CE Co-Display		9,473	Advanced Function				
Age at Camp	🔿 🖂 No Drill	2009	9,470	Group Data				
Age Group at Carro	Drill Down		9,630	Totals				
Athlete Counter	 Si Drill Anywhere 	2009	9.635					
Broken Bone Group	C R Drill Through		9,754	Add Filter				
Athlete Location	Report Data	2009	9,810	Hide Field				
Athlete Payment		2922	9,841	Delete				
 Invoiced Amount 	Data Source: Ski Team View: Ski Team	2009	9,857	200.00				
Cancellation Fee	V NVV. DKJ HEATT	2009	9,872	\$503,420				
Invoice Estimate	Active Row Limit: 10000	2009	9,897	\$9,721				
Currency Code	Show Duplicate Records:	2009	9,994	55,721				
 Exchange Rate 		2009	9,913	\$9,721				
 Involced (Pref Durrency) 	Auto Refresh:	2009	9,914	55,721				
Oost of Camp	Preview Row Limit	2009	9,915	\$9,721				
Profit Margin	PTENEW HOW LIFE	2009	9,933	50,721				
Days Between Invoice and C		2009	9,938	\$24,906				
Booking .		2009	9,929	50,721				
+				nda			View SQL	

Count Distinct Athlete ID V Sum Invoiced Amount

127

138

421

\$17,633,473

\$8,611,470

\$11,012,244

Your report should now look like the on pictured here.

Year

2009

2010

2011

7. Click on the **Column Formatting** ico n in the main Formatting bar in order to open the formatting menu. Here you can adjust the title and formatting options applied to each of the fields in the report. 2012 \$81,690,100 483 2013 589 \$158,353,519 2014 608 \$152,912,577 2015 529 \$28,199,351 2016 50 \$12,522,605 **__**[h_ Ħ \mathcal{L} žΞ Column Formatting Columns 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

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.

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**.

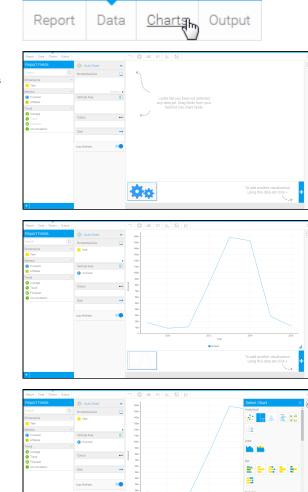
Pie

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.

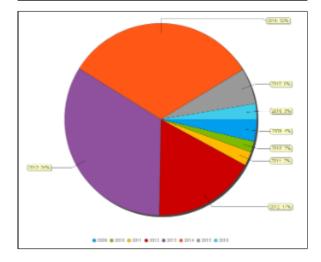
7. Set the Labels display to **On** and select the **Category** and **Percentage** options.

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



Labels Display			4
			~
Labels			
	labels for each val	le on the chart.	
Label Con	tents		Category 🗸
			Value
			Percentage 🗹
Style			Default 🔵 Custom
Use the sy	stem default setting	s for chart labels.	

Your chart should now look like the one pictured here.

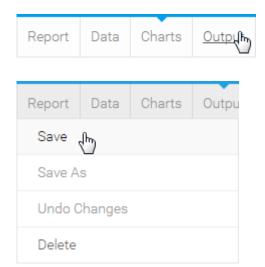


Output

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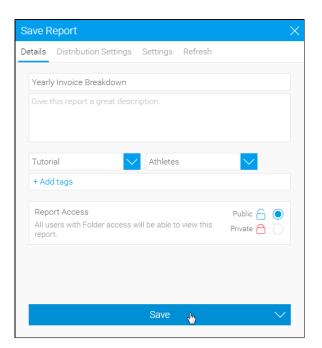
1. Click on the **Output** link in the main navigation bar in order to progress to the **Report Output** step. Here you can apply formatting options and save the report.

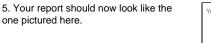
2. Click on the **Report** link in the main navigation bar and select the **Save** option.

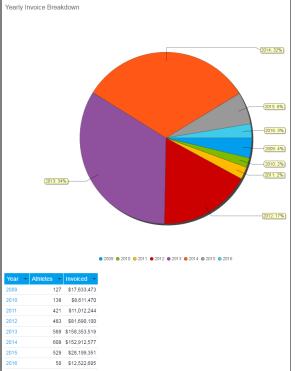


3. Define a **Name** and **Description** for the report, then provide **Category** and **S ub Category** options for storage.

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







Further Information

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

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