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

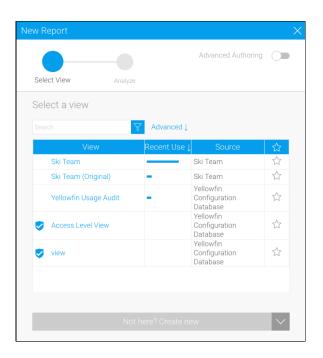
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This section walks you through starting the report building process, including selecting the type of builder, and the view.

 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.

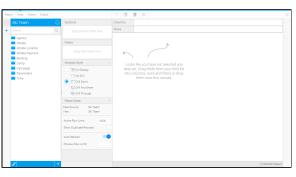


Data

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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.



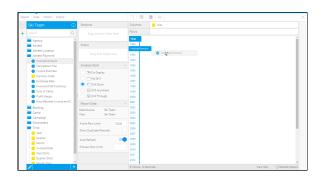
🚟 Ski Team	() Sections	Columns
	Q Drag section fields here	Rows
Apercy Africte Africte Africte Africte Downer Corro Corroson Feanters Time Oursel Oursel Oursel Martets Martets	Fiters Diag Ster Felds here Analysis Style This Consisty Dia Down	Looks lie yoo have not selected any because the selected any selections, cose and here or drop them onto this canvas.
 Invoiced Date Verr (Dm) Outre (Dm) Moth (Dm) Day (Dm) 	Record Data Record Data Data Source Ski Team Verce Ski Team Verce Ve	

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	
Erst Name		2009 9,100	Sort	# Count	
East Name	Analysis Style	2009 9,205	Format		
Demographic Gender		2000 9,473		# Count Distinct	
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	2009 9,857	\$22.4		
Cancellation Fee Invoice Estimate		2009 9,872	\$503,4		
Ourrency Code	Active Row Limit: 10000	2029 9,897	\$9,7		
Eschange Rate	Show Duplicate Records	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

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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**.

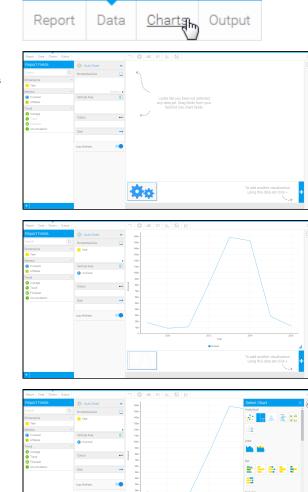
Pie

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.

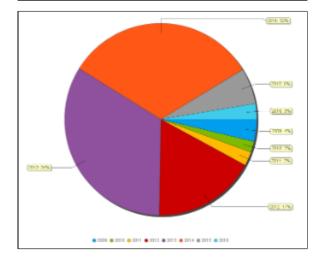
7. Set the Labels display to **On** and select the **Category** and **Percentage** options.

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.

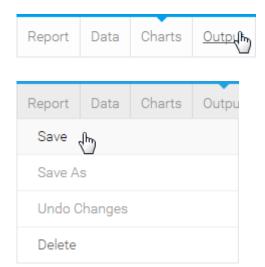


Output

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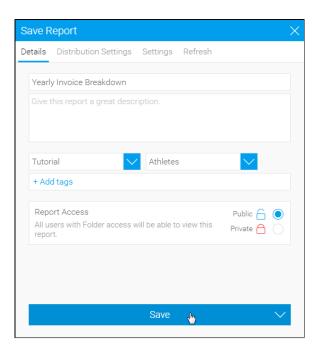
1. Click on the **Output** link in the main navigation bar in order to progress to the **Report Output** step. Here you can apply formatting options and save the report.

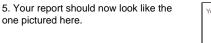
2. Click on the **Report** link in the main navigation bar and select the **Save** option.

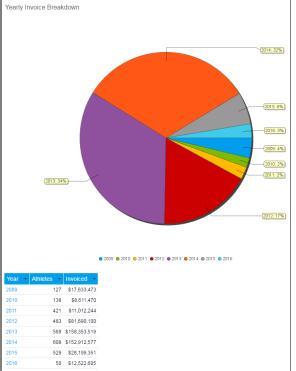


3. Define a **Name** and **Description** for the report, then provide **Category** and **S ub Category** options for storage.

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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