

Create Reports

How to create reports, add filters, modify the layout and save.

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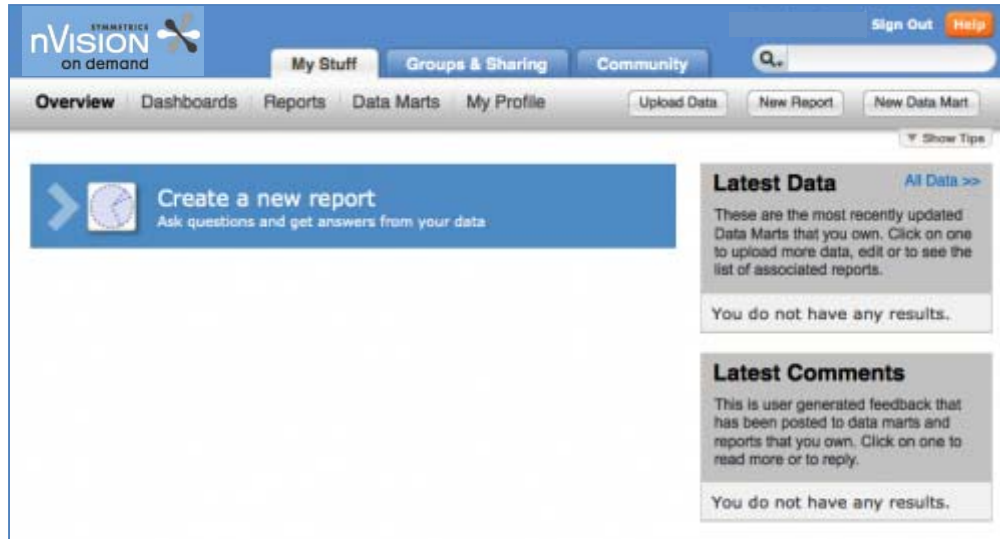
1. What is a Report?

Reports are how we get information from a Data Mart. You create a Report against your Data Mart and nVISION On Demand will return the answer in the form of a table or graph. Once you have the information that you want, you can save your Report and share it to a group.

Before you can create a Report, you need to have access to a Data Mart. You can create your own Data Mart using the Data Mart Designer or a QuickStart or have one shared to you by another nVISION On Demand user.

2. How do I launch a new Report?

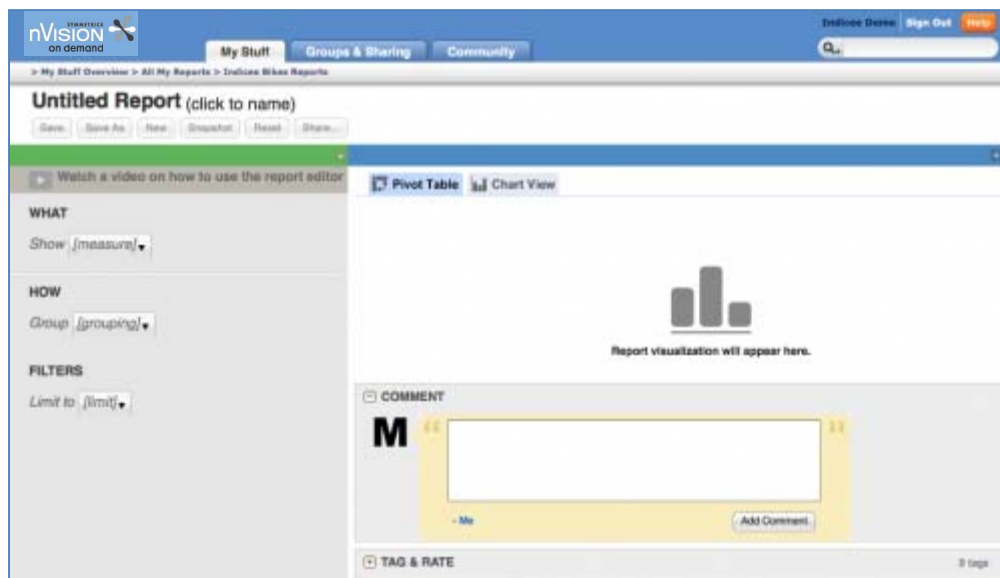
To launch the Report Editor, click on the **New Report** button. There is one on the Overview page. You can also find the **New Report** button the Reports page and on lots of other pages throughout nVISION On Demand.



Clicking on the **New Report** button will launch the Report Editor. If you have access to more than one Data Mart, you will be prompted to choose which Data Mart you want to use.

3. Report Editor 101

The left hand side of the screen, under the green bar, is where you define the numbers and organization of your Report. The results are displayed on the right under the blue bar. To create a Report, nVISION On Demand uses menus that contain simple English terms specific to your Data Mart. These menus are found under What, How and Filters labels.



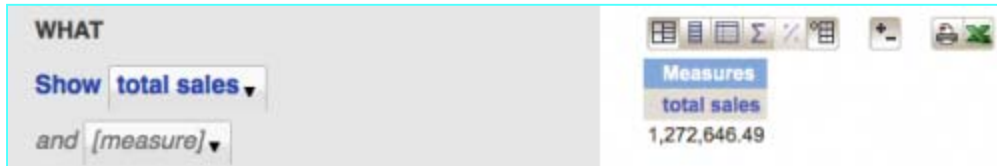
To bring up a menu of the available items:

- Under **What** Click on **[measure]** to see your numerical data
- Under **How** click on **[grouping]** to see your data categories or dimensions
- Under **Filters** click on **[limit]** to filter your data based on a specific time period or a value of a How item

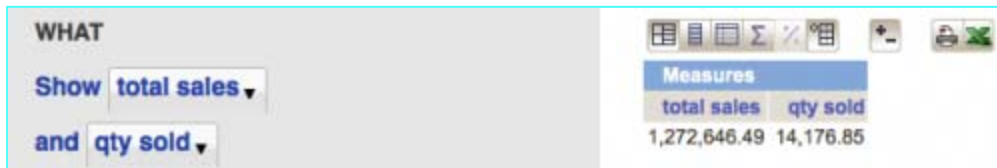
TIP: If you used the Data Mart Editor, you will notice that nVISION On Demand uses the headings from the Preview Data Mart procedure (see “Use Data Marts” Help document) step to populate the menus.

4. How do I add numerical data to the Report?

To add numerical data, you need to click on **[measure]** in the **What** section. nVISION On Demand will present a list of all the data items available in your Data Mart. Choose one and nVISION On Demand will display the result in the grid and add another **[measure]** so that you can add a second column of numerical data to the grid.



Repeat the process to add more columns. The order of the columns on the grid is determined by the order that the **What** items were added.



To delete a **What** column, click on the name of the item you wish to delete. nVISION On Demand will present the list of data items with the current one struck through, in this case ~~qty sold~~. Click on it and nVISION On Demand will remove this column from the grid. You can also replace a data column by clicking on a different item.



5. How do I organize the data in a Report?

The **How** section of the Report Editor lets you organize your data by grouping it by category. Click on **[grouping]** and nVISION On Demand will present a list of the available groupings from your Data Mart. The list will contain both time and non-time items. Choose one and nVISION On Demand will display

your chosen numerical data broken down by all the values in that category. If you select **department**, nVISION On Demand displays **total sales** broken down for each **department**. Select **Month** and nVISION On Demand will display total sales broken down by each month.

Item	Measures
department	total sales
+Accessories	63,342.32
+Bikes	840,931.61
+Clothing	79,791.04
+Helmets	33,412.95
+Parts	255,168.57

You can also add a second **grouping** by clicking on **[grouping]** and selecting a category. The example below shows sales for each department organized or grouped by store. The order of the groupings determines how nVISION On Demand organizes the grid. The first grouping is always closest to the data column. To swap department and store, delete department and add it back below store. nVISION On Demand updates the grid each time a change is made.

store name	Item	Measures
store name	department	total sales
Banff	+Accessories	22,925.85
	+Bikes	274,896.23
	+Clothing	35,591.37
	+Helmets	10,851.04
	+Parts	67,658.19
Nelson	+Accessories	26,782.80
	+Bikes	154,054.91
	+Clothing	7,739.46
	+Helmets	10,261.01
	+Parts	25,369.93

6. How do I filter the data in a Report?

Filters are used to limit a Report to a specific subset of the data. They are commonly used to show data for a specific time period. You can also apply a filter based on any other **How** category.

To start, click on **[limit]** and nVISION On Demand will present a list of the filter options available. The menu shows 3 types of filters: **relative dates**, **specific dates** and **How values**. To choose one, simply click on it.

Relative dates

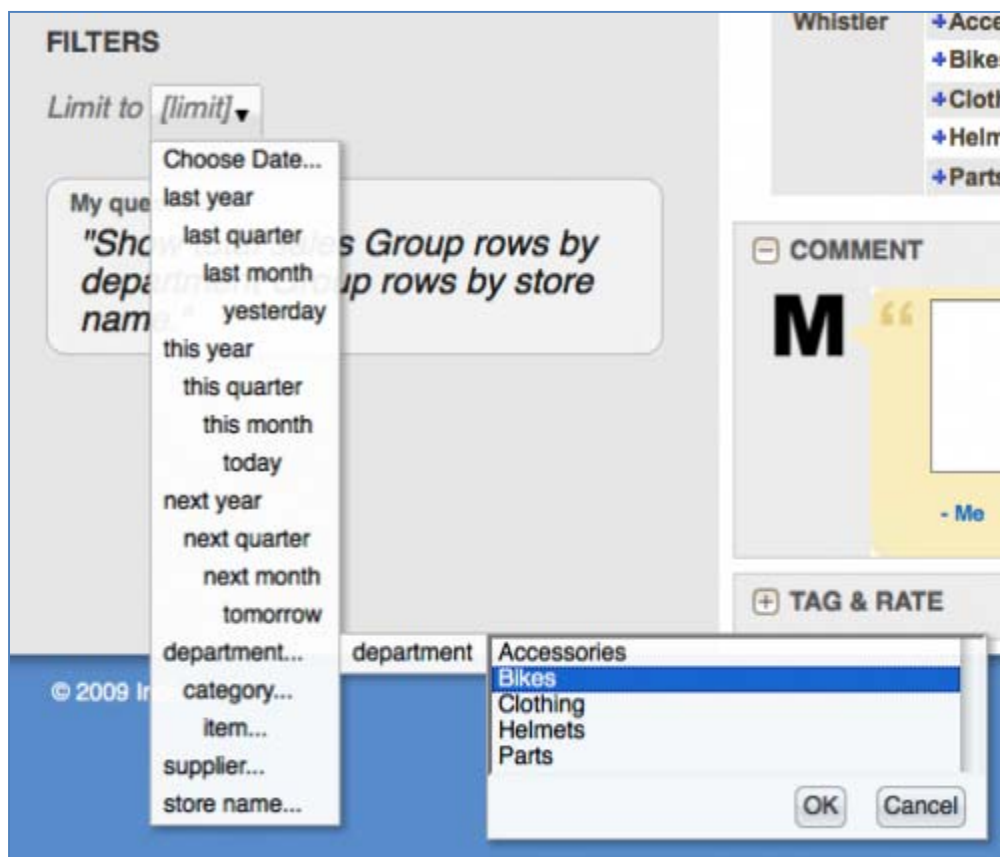
Last month, this year and yesterday are relative dates. When nVISION On Demand returns the result of a Report limited to this month, it determines the actual date for this month and applies this to the data. This means that your answer will be very different if you create your Report on May 31 versus June 1. These are the easiest filters to apply.

Specific dates

If you want to limit your Report to a specific period of time, or several different periods, you need to click on **Choose Date**. nVISION On Demand will then launch the date chooser, which lets you navigate through all the dates in your Data Mart and choose from a group of years to a single day. In the example here, the Data Mart has data from January to June 2009. I have chosen to create a filter that will only return data from February and March 2009.

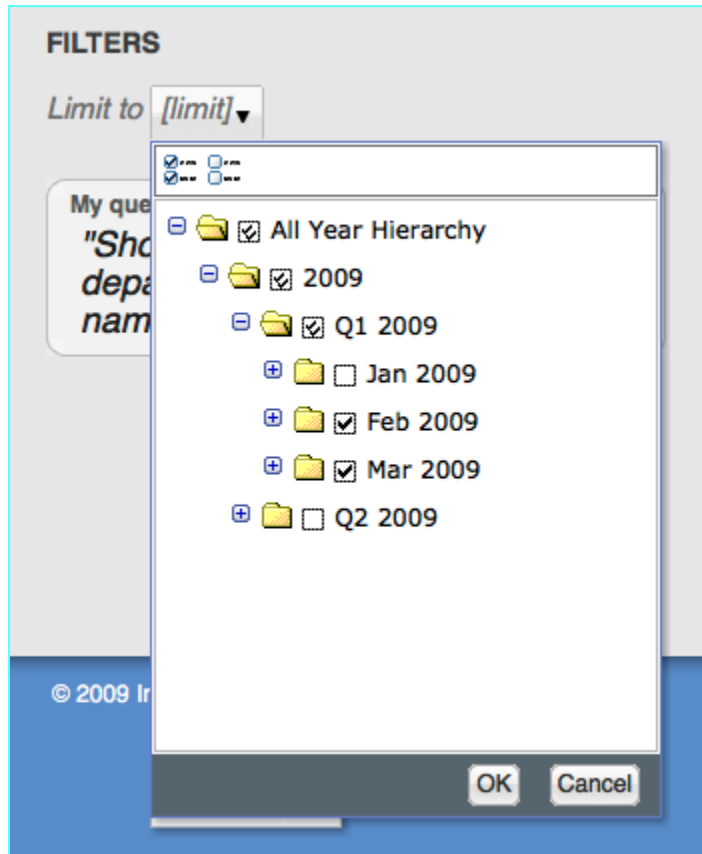
How filters

How filters let you filter on a set of values in a specific category. In this example I only want to see the sales for bikes. To do this I click on **[set filter]** beside department and then nVISION On Demand returns a list of all the different values for *department*. To choose more than one item use *shift-click* or *ctrl-click*.



Once you choose your filters, they are displayed in the filter section of the Report and can be easily changed. If you apply more than one filter, the results will be additive, which means the data in the Report must meet the conditions of all the filters.

The Report shows sales of bikes for February and March 2009.



7. Crosstabs - how do I show a How category across columns?

Everything on rows

When looking at data, it is much easier to see a pattern when scanning left to right across columns than up and down along rows. In our bike shop example, I would like to compare the sales for each department between the different stores. This is difficult to do since I have to skip a bunch of rows to compare the bike sales at each store. To make it easier to read, we group the stores across the columns rather than the rows.

HOW

Group rows by department [that]

Group rows by store name [that]

Group columns by

With Crosstab

To format as a crosstab, click on **rows by** and select **columns by**. nVISION On Demand will then reformat the grid with the chosen category displayed along the columns.

8. How do I display subtotals?

To add subtotals to the grid, click on the subtotal button located above the grid. nVISION On Demand will add a subtotal for each value in the category. In this example, the subtotals provide the total sales for each store.

		store name		
		Banff	Nelson	Whistler
Item	department	Measures	Measures	Measures
(All)		total sales	total sales	total sales
All Item	+Accessories	22,925.85	26,782.80	13,633.67
	+Bikes	274,896.23	154,054.91	411,980.47
	+Clothing	35,591.37	7,739.46	36,460.21
	+Helmets	10,851.04	10,261.01	12,300.90
	+Parts	67,658.19	25,369.93	162,140.45
	Item total	411,922.68	224,208.11	636,515.70

9. How do I display Percentage of Total values?

To add Percentage of Total values to the grid, you must first click on the subtotal button located above the grid, and then the percentage of total value button. nVISION On Demand will add a Percentage of Total value for each total in the category. In this example, the Percentage of Total values provide the relative sales for each store.

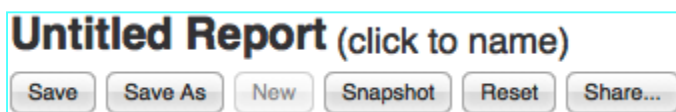
		store name					
		Banff		Nelson		Whistler	
Item (All)	department	Measures		Measures		Measures	
		total sales	total sales / total	total sales	total sales / total	total sales	total sales / total
All Item	+Accessories	22,925.85	5.57%	26,782.80	11.95%	13,633.67	2.14%
	+Bikes	274,896.23	66.73%	154,054.91	68.71%	411,980.47	64.72%
	+Clothing	35,591.37	8.64%	7,739.46	3.45%	36,460.21	5.73%
	+Helmets	10,851.04	2.63%	10,261.01	4.58%	12,300.90	1.93%
	+Parts	67,658.19	16.42%	25,369.93	11.32%	162,140.45	25.47%
	Item total	411,922.68	100.00%	224,208.11	100.00%	636,515.70	100.00%

10. How do I save a Report?

To save a Report, click on Untitled **Report (click to name)**, type a descriptive name in the box and then click the **Save** button. Once you save your Report the **Save** button will be grayed out. If you make another change to the Report, the **Save** button will become enabled.

Here is a quick list of what the other buttons do:

- **Save As** lets you save your Report with a new name without changing your original Report
- **New** clears the Report Editor, letting you create a new Reports
- **Snapshot** save an exact copy the grid. If new data is added to the Data Mart it will never change a saved snapshot
- **Reset** restores the Report to the last saved version
- **Share** allows you to choose a group to share your Report. Sharing is how you collaborate within nVISION On Demand









11. How to I sort the data in a Report?

You can sort the grid by any data column. To sort, click on the blue circle beside the name of the What item. Click once to sort in ascending order, click again to sort in descending order and click a third time to return to the original state.

Item (All)		store name		
		Banff	Nelson	Whistler
department		Measures	Measures	Measures
All Item	+Helmets	▲ total sales	▶ total sales	▶ total sales
	+Accessories	10,851.04	10,261.01	12,300.90
	+Clothing	22,925.85	26,782.80	13,633.67
	+Parts	35,591.37	7,739.46	36,460.21
	+Bikes	67,658.19	25,369.93	162,140.45
	Item total	274,896.23	154,054.91	411,980.47
		411,922.68	224,208.11	636,515.70

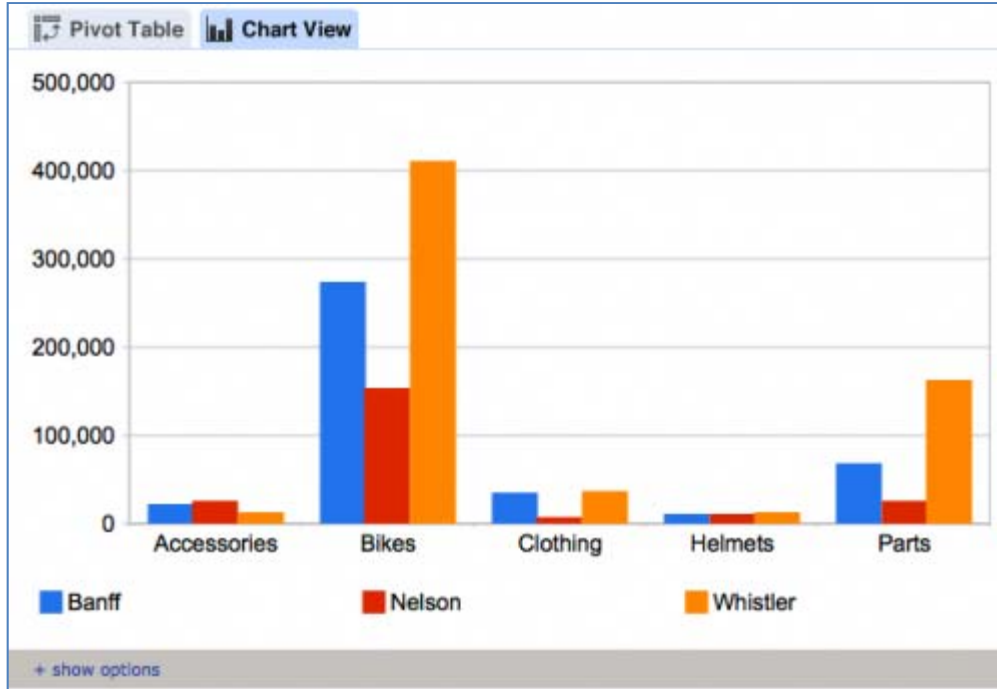
12. What do the buttons above the grid do?

With your answer displayed in the grid, you can use the button bar to customize the grid and interact with the data. Below is a brief description of what the buttons do:

-  Display or hide the complete drill down structure
-  Fill in the labels for all rows in the grid
-  Show the properties of each element
-  Suppress or don't show rows with value of zero or null
-  Turn drill down on or off. Used if you share a Report and don't want people to drill down
-  Export to PDF or Excel

13. Chart View

Clicking on the chart view tab on the top of the pivot table automatically displays a graph of your data. You can switch back and forth between the pivot table and the chart view and any changes to the table are immediately reflected in the chart.



You can also change the chart format and add a title or a legend by clicking on Show Options.

The next step is to **share** your Report. Find out how by reading the “Share” help document.