Data

Overview

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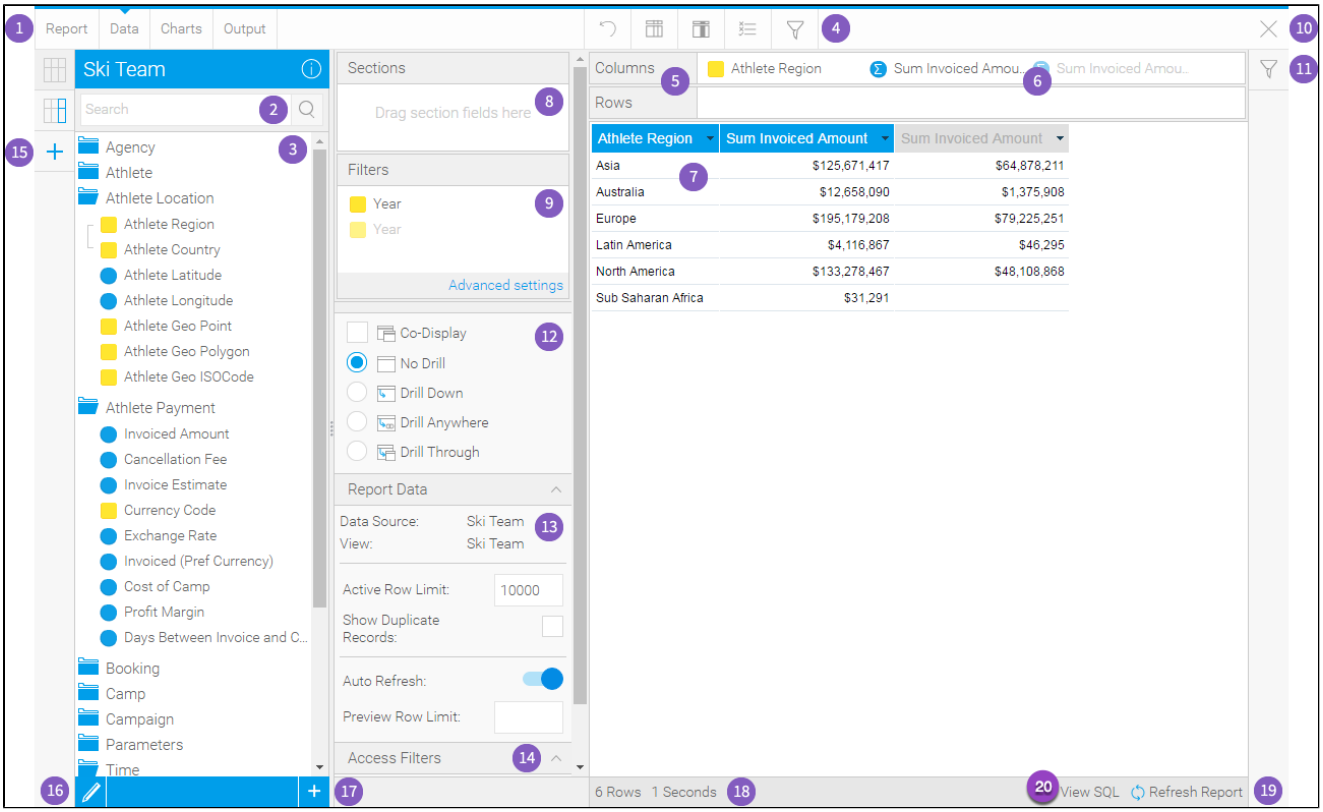
The Report Data page is where you build, edit and view the report data definitions used to generate Yellowfin reports. These definitions include both the queries you use to retrieve data for your document, and the data formatting.

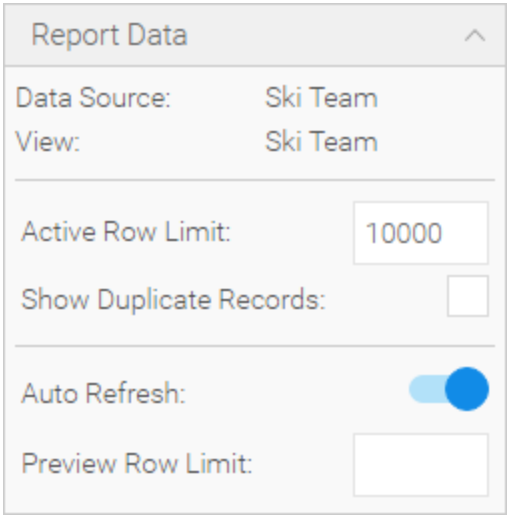


#	Function /Panel	Description
1.	**Navigation**	Access various builder steps by clicking on the links in the navigation bar. The **Report** link provides the user with save options throughout the building process, rather than waiting until the final step. See Report & Edit Menus for more information.
2.	**View Fields Search**	Search for fields to use in the report here, accessing all fields provided by the selected View in the previous **Create** step of the builder.
3.	**View Fields List**	Select fields to use in the report from the list provided by the selected View in the previous **Create** step of the builder. To add multiple fields at once, simply hold down Ctrl/Command or Shift while selecting fields.
4.	**Formatting Menus**	Access various formatting menus from this section of the navigation bar. This allows the user to apply formatting changes to the report and preview the output while still on the **Data** step, rather than having to toggle between it and the **Output** step. See Formatting for more information.
5.	**Table Body Fields**	Drag fields into the Columns and/or Rows lists to build the body of the report. Adding fields to both lists will create a cross tab report automatically. See Fields for more information.

6.	**Field Drop Down Menus**	Apply aggregations, formatting, advanced functions, totals, and other options to a field via its drop down menu. See Fields for more information.
7.	**Table Preview**	View a preview of the final report output. The user can also drag fields into this preview area, rather than adding them to the Columns or Rows list to add them to the table. Fields can also be reordered here by dragging the field headers into position. See Table Preview for more information.
8.	**Section Fields**	Select fields to be used as sections in the report, these will create splits in the table for each value of the section field(s). See Sections for more information.
9.	**Filter Fields**	Select fields to be used as filters in the report, values for these can either be defined during the report creation process, or left as user prompt. See Filters for more information.
10.	**Close Builder Button**	Leave the builder using this button.
11.	**Filter Panel**	Apply values to filters defined as user prompt here in order to restrict the results in the table preview. Values applied here are only used to adjust the preview, not the final report output. See Filter Preview for more information.
12.	**Analysis Style**	Enable Related Reports and Drill functionality through this panel. See Related Reports for more information.
13.	**Report Data**	View the Data Source and View name that the report is built on. The user can also limit the rows returned in the report, the preview, and switch the Auto Refresh off if they wish to build with dummy data, rather than continually querying the database after each field change. See Report Data for more information.
14.	**Access Filters**	If there are access filters applied to the View selected to build off, they will appear here to be enabled/disabled. If the user does not have the Access Filter role permission they will not see this section. See Access Filters for more information.
15.	**Sub Query Panel**	Create and switch between sub queries through this panel. If the user does not have the Sub Queries role permission they will not see these buttons. See Sub Queries for more information.
16.	**Edit View**	The user can access the view via this button in order to make changes required for the report creation. If the user does not have the appropriate Database Views role permissions they will not have access to this button.
17.	**Add Calculation**	The user can create calculated fields to use within the report. Depending on the user's role permissions they may be able to create Freehand SQL calculations as well as using the builder interface. See Calculations for more information.
18.	**Table Preview Info**	View the number of rows and time taken to return the table preview. See Table Preview for more information.
19.	**Refresh Report**	Refresh the data displayed in the table preview. See Table Preview for more information.
20.	**View SQL**	View the report's SQL compiled in the background. See View SQL for more information.

Report Data

The Report Data panel displays information related to the source of the report, and settings that can be applied to the rows and preview.



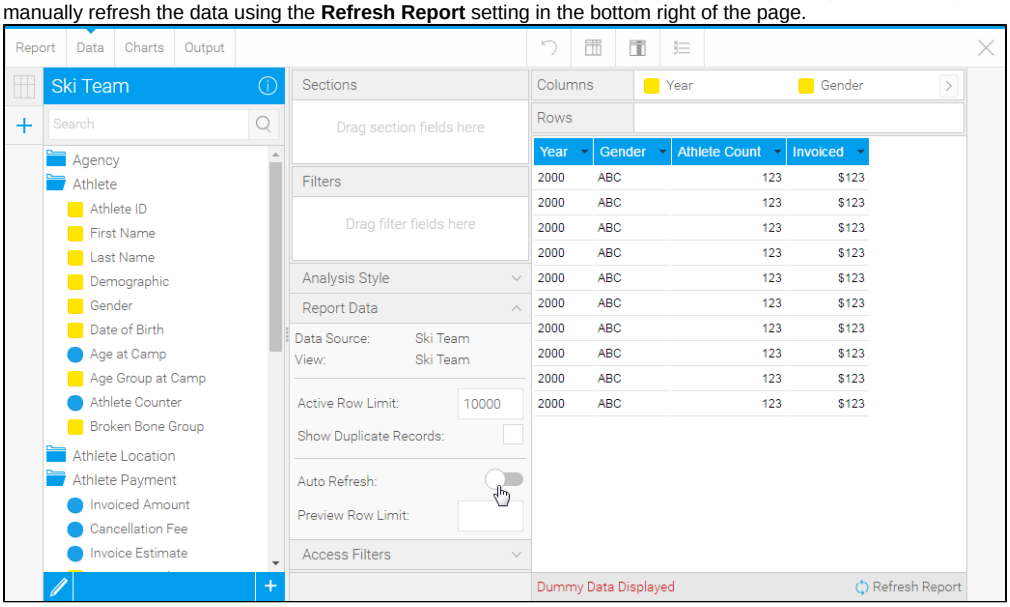
Option	Description
Data Source	Provides the name of the db connection used to create the report.
View	Provides the name of the view use to create the report.
Active Row Limit	Provides the user with the option to restrict the number of rows returned in the active report. This is inherited from the Source Connection, but can be restricted further at the report level. **Note:** this setting does not control the table preview on the data step, only the final output of the report.
Show Duplicate Records	This allows the user to remove the 'DISTINCT' clause from the SQL. This means that results that appear multiple times will display in the final report, rather than being removed, so there may be rows that are identical.
Auto Refresh	This allows the user to turn the Auto Refresh option **On** or **Off**. Auto Refresh controls the way the sample data in the Table Preview is generated. • **On:** each time a change is made to the report, such as a field being added to the Columns or Rows list, the database is queried. • **Off:** dummy data is used to display a preview of the table without querying the database. This should be used for reports that require a large number of fields to be added, or edits made, to help with performance. **Note:** this setting does not control the final output of the report, only table preview on the data step.
Preview Row Limit	This allows the user to define the number of rows displayed in the table preview. **Note:** this setting does not control the final output of the report, only table preview on the data and design step.

Table Preview

The Table Preview provides the user with a snapshot of what the report will look like, with a limited number of rows and the option to use dummy data.

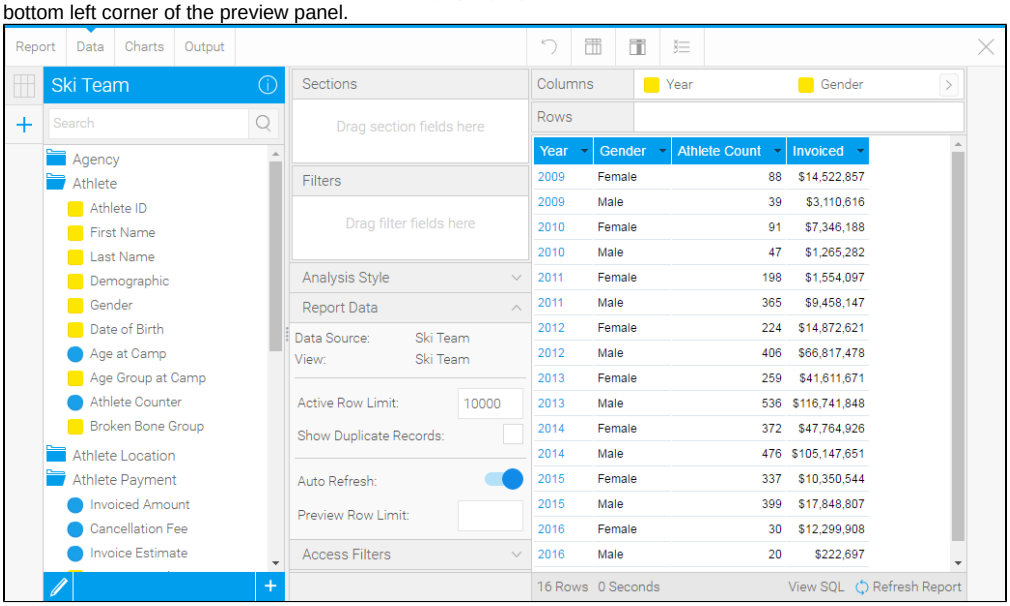
Dummy Data

You can see here that the system has generated mock data in order to populate the report to preview the layout and format. The user has the option to manually refresh the data using the **Refresh Report** setting in the bottom right of the page.



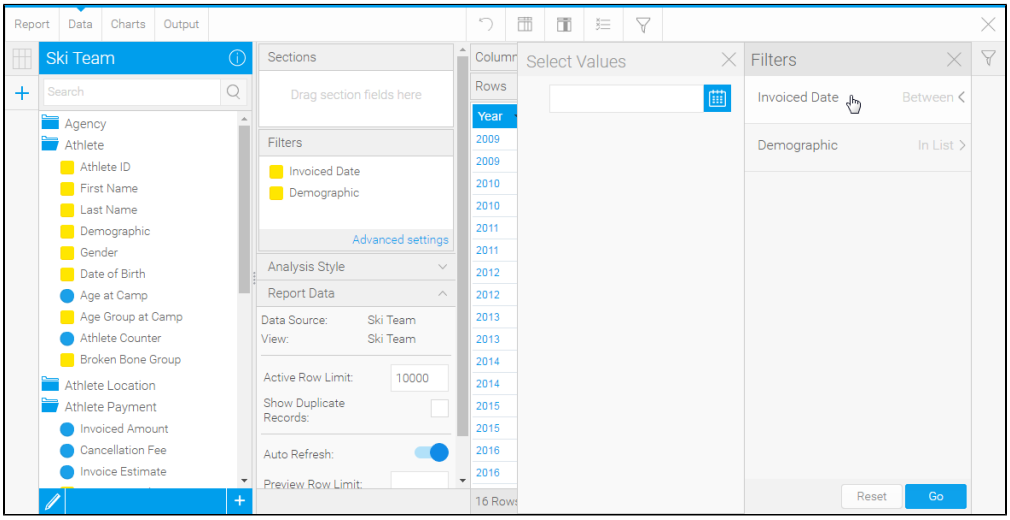
Real Data

You can see here that real data has been used by querying the database. The number of rows returned and the time the query too is displayed in the bottom left corner of the preview panel.



Filter Preview

Once fields have been added to the Filters list on the Data step you will see a filter panel on the right of the page become available. This works as filters do on the Dashboard and Report Output pages and is designed to allow users to preview how certain filter values may effect the table preview.

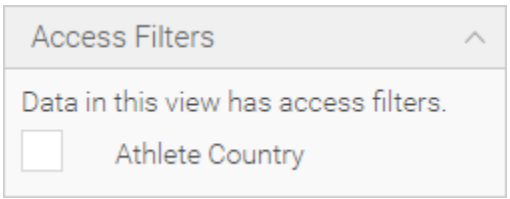


Note: this does not define filter settings or values for the active report output, only for the table preview on the data step of the builder.

Access Filters

If you wish to filter a report so that the result set displayed is specific for an individual user then a source filter will need to be applied. The data displayed is therefore personalized for the reader.

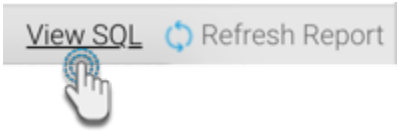
If there are Access Filters available in the report's view they will be available to enable/disable here. The user must have the required role permissions in order to see these settings as they are used for row level security.



> *See Restricting Data with Access Filters for more information.*

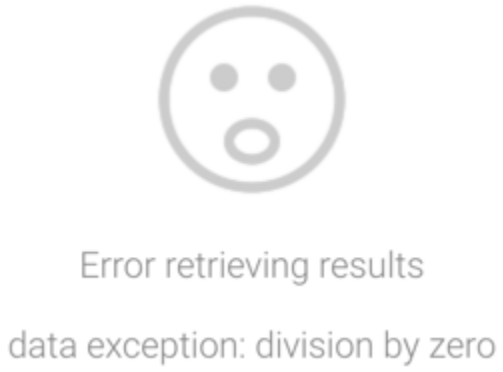
View SQL

As you build your report by adding data fields, the report's SQL will be compiled in the background. Click on the **View SQL** button in the bottom-right corner of the Report builder's Data page to view the SQL.



This will bring up the SQL Statement window that displays the SQL.

It is also possible to view the SQL even if the report has generated an error. For example, the error can be seen on the report's preview panel.



And easily traced in the SQL statement.

SQL Statement

Master Query

```
SELECT DISTINCT
   "DATELOOKUP"."YEARDATE" AS C1,
   SUM("ATHLETEFACT"."INVOICEDAMOUNT"),
   "ATHLETEFACT"."INVOICEDAMOUNT" / 0
FROM "ATHLETEFACT"
INNER JOIN "DATELOOKUP"
ON (
   "ATHLETEFACT"."INVOICEDDATE" = "DATELOOKUP"."DAYDATE"
)
GROUP BY
   "ATHLETEFACT"."INVOICEDAMOUNT" / 0,
   "DATELOOKUP"."YEARDATE"
```

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