

# BellaDati Training - Reports



# Agenda

- **Reports**
  - creating reports
  - searching reports, report filters
  - managing layout, layout controls
  - sharing and collaboration
  - working with variables
  - working with attachments
  - exporting reports and views
  - basic views controls
  - working with tables

# Agenda

- **Reports**
  - working with charts
  - working with KPI labels
  - working with GEO maps
  - working with custom content
  - selecting indicators, create new indicators
  - working with formulas

# Creating report

- **Report editor** role is required
- Each report is **based on single data set (original or joined)**
- **Can be created**
  - from data set overview
  - from main menu
  - as a copy of existing report
  - from a XML template



# Searching report, report filters

- **Full text search support**
- **From the reports menu or from quick search**
- **Search areas:**
  - Data sets (name, indicators, attributes)
  - Reports (name, tags, view names, indicators, attributes)
  - Dashboards (name, view names)
  - Indicators and attributes
- **Search by access rights**
- **Ordering support**
  - by name
  - by owner
  - by date created, by last changed date
- **Bulk changes – delete and share**
- **Saved filters support**

# Report composition

- **Report detail info panel** – name, tags, description, data set
- **Collapsible right side panel with main controls**
  - Edit, share, export
  - comments and attachments
  - variables and filters
  - history

BellaDati Folders Dashboards Reports Data sets Search...

1. Pharmacies Hong Kong - Sales and Planograms

Click to insert a description

planogram

Pharmacies Hong Kong

Created by Retail Sales on Nov 5, 2015 9:19:51 AM

Brand

Bayer

Robitussin

CENTRUM

District

Search...

10/10/2015 10/30/2015

Sales by District

Sales

Central and Western

Eastern

Description

Edit

All files

Beverages

1. Beverage - Mar...

2. Beverage - Con...

3. Beverage - Sal...

Inline maintenance

1. Inline Display...

2. Maintenance Phase

3. Retail Company

4. Best Buy Exten...

5. Best Buy Table...

Machine learning

1. Machine Learni...

2. Machine Learni...

3. Machine Learni...

Planograms

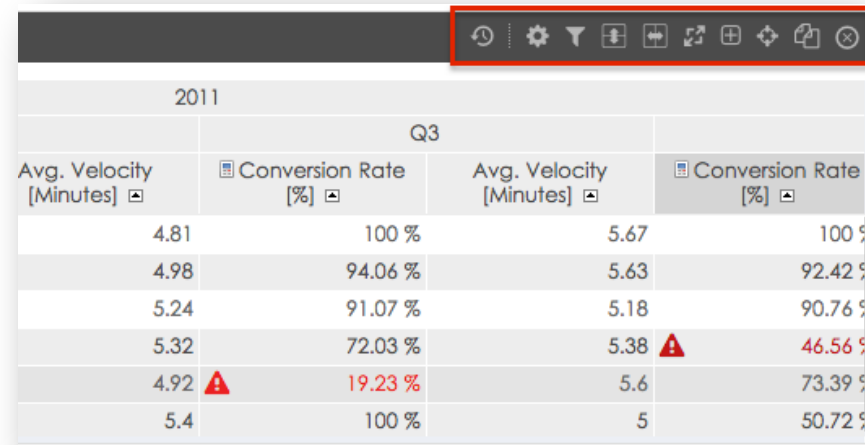
1. Pharmacies Hon...

Retail POS

1. Retail POS - L...

# Report layout

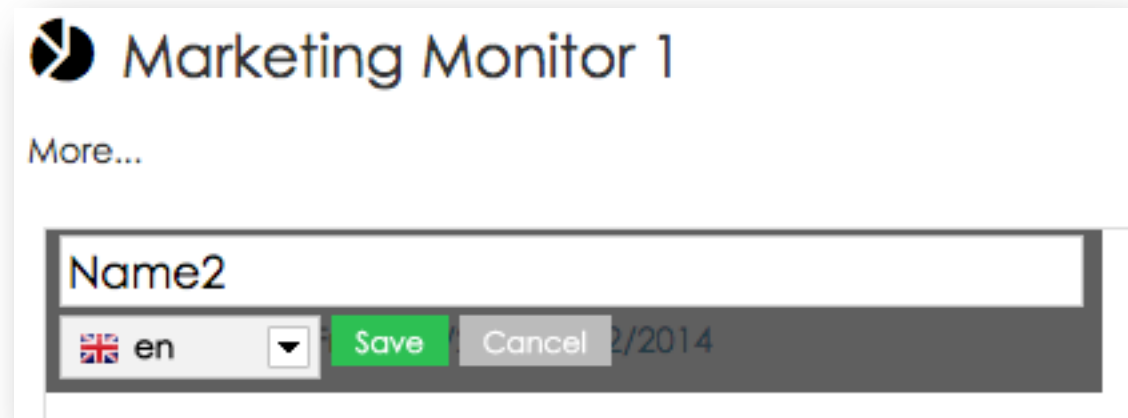
- Fully interactive and customizable
- Available in edit mode
- Possible operations:
  - Split horizontally and vertically
  - Enlarge to fit the whole row
  - Insert new row
  - Move the view
  - Clone view
  - Delete view
  - Reset layout



2011			
Q3			
Avg. Velocity [Minutes]	Conversion Rate [%]	Avg. Velocity [Minutes]	Conversion Rate [%]
4.81	100 %	5.67	100 %
4.98	94.06 %	5.63	92.42 %
5.24	91.07 %	5.18	90.76 %
5.32	72.03 %	5.38	46.56 %
4.92	19.23 %	5.6	73.39 %
5.4	100 %	5	50.72 %

# Report translation

- Translation support for report and view names
- Available in-line
- **Will be displayed according to user profile preference**

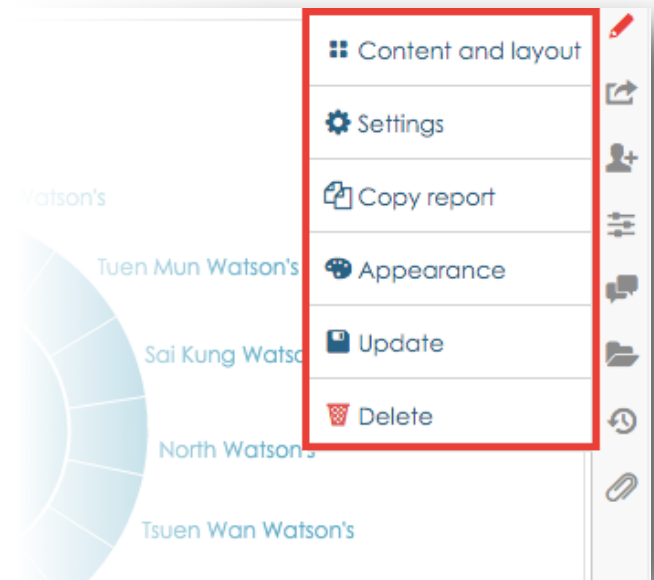


The screenshot shows a dialog box titled "Marketing Monitor 1" with a "More..." link. Below the link is a text input field containing "Name2". At the bottom of the dialog, there is a language selection dropdown showing a UK flag and "en", a green "Save" button, a grey "Cancel" button, and a date "2/2014".



# Copying & deleting report

- To make a copy of the report, you must have the report **editor** role
- Optional attachments and comments copy
- Deleting is allowed to report **owners** and **administrators**
- By deleting the report, all published views become unavailable



# Sharing report

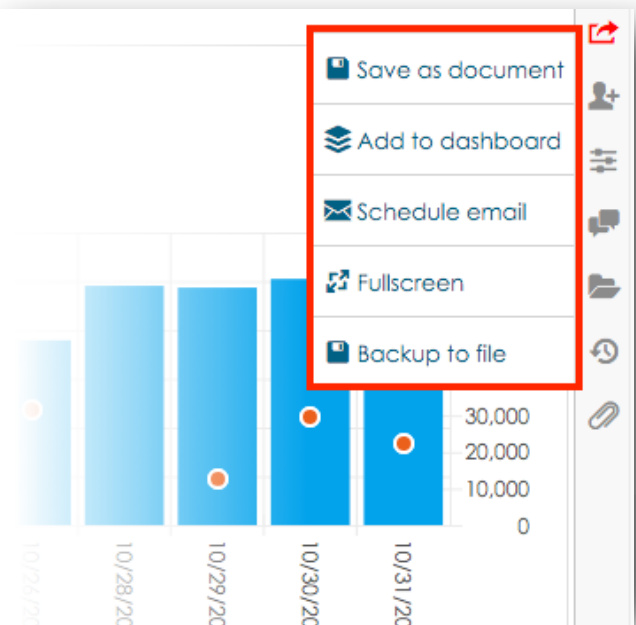
- **To the users with login only**
- **Read-only and read-write access mode**
- **Read-only allows (available actions are based on selected control type):**
  - changing filters and variables
  - changing date intervals
  - drill-down to the preset level
  - export and embed
  - making copies of the report
- **Read-write access allows:**
  - Everything except deleting the report

# Sharing report

- **Different control types for report viewers**
  - All controls
  - Limited controls
  - Minimal controls
- **Changes made by report viewers are stored only for one session**
- **Create report group to share set of reports**

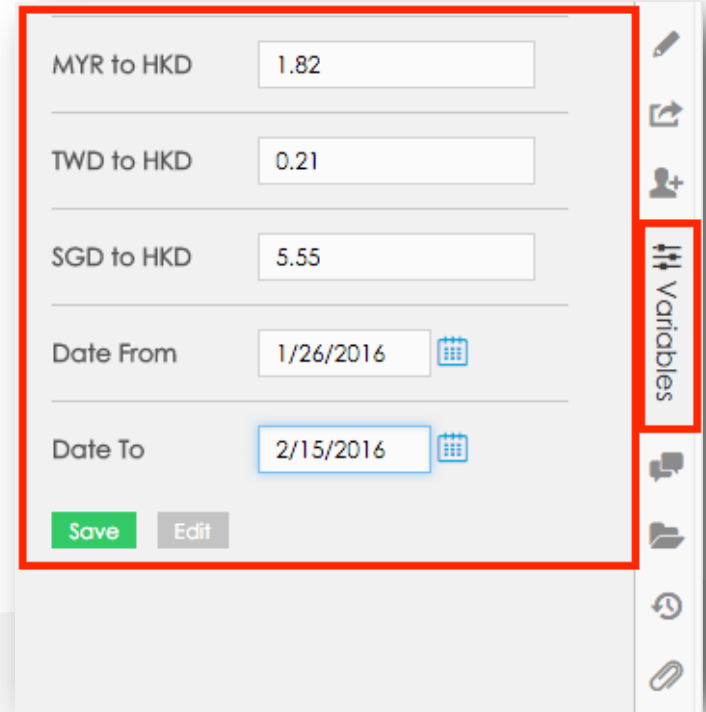
# Exporting report

- **Export to PDF, PPT and XLS**
- **Adding views to the dashboard**
- **Send as email**
  - On-time or periodically
    - day, week, month, specific day of week/month
  - To registered users only





# Report variables

- **Can be referenced from entire report**
  - indicator formulas
  - date/time interval definition
  - captions (view names, time entries names)
- **valid for the current session only**
- **passing through the URL address**



A screenshot of a report configuration interface. The interface is divided into two main sections: a main configuration area and a vertical sidebar on the right. The main configuration area is enclosed in a red border and contains the following fields:

MYR to HKD	<input type="text" value="1.82"/>
TWD to HKD	<input type="text" value="0.21"/>
SGD to HKD	<input type="text" value="5.55"/>
Date From	<input type="text" value="1/26/2016"/> 
Date To	<input type="text" value="2/15/2016"/> 

At the bottom of the main configuration area, there are two buttons: a green "Save" button and a grey "Edit" button.

The vertical sidebar on the right contains several icons. The "Variables" icon, which consists of a vertical double-headed arrow, is highlighted with a red box. Other icons include a pencil, a refresh symbol, a trash can, a printer, a magnifying glass, and a link icon.

# Editing Variables

- **Variable can be:**
  - Text, Number, Date, Filter
- **Setup includes:**
  - Type, Name, Description, Default value (persistent), Value

### Variables

Add new variable

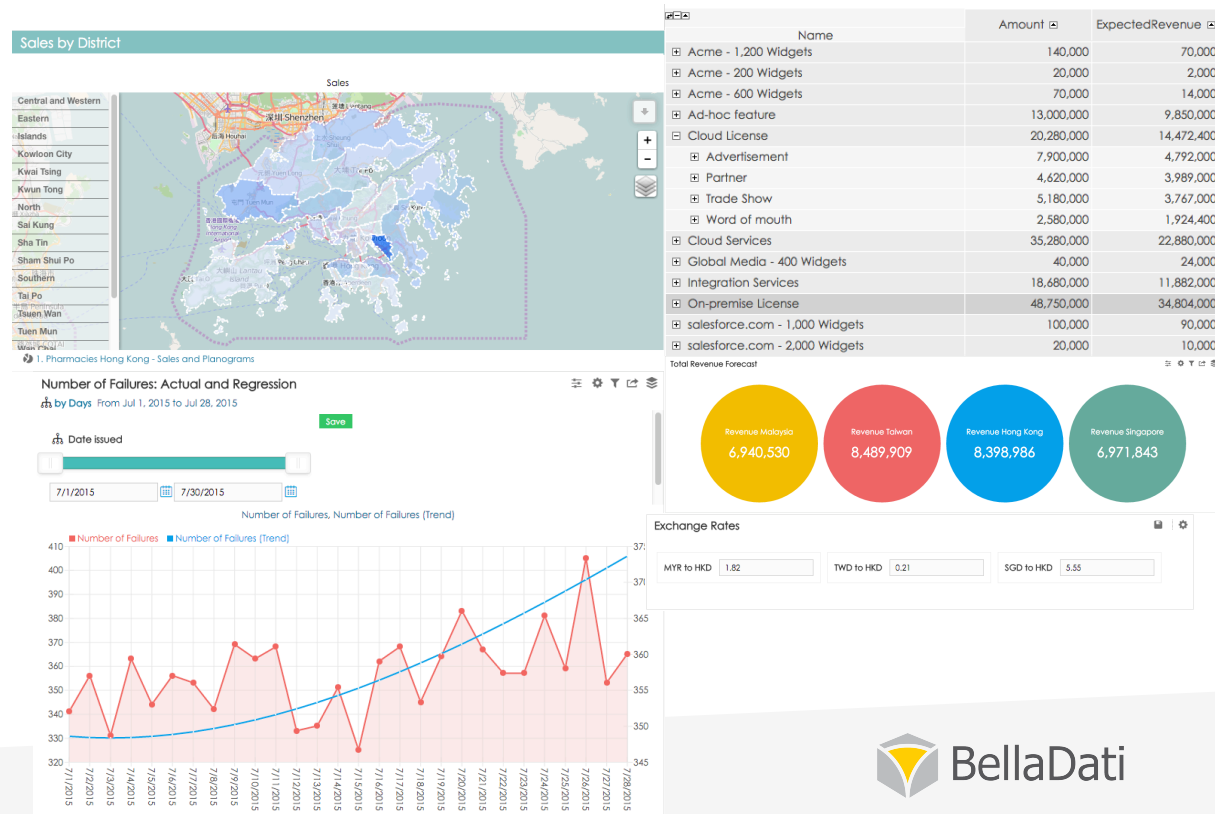
Of type  identified as

Defined variables and filters

123	MYRtoHKD	<input type="text" value="1.82"/>	<input type="button" value="edit"/> <input type="button" value="delete"/>
123	TWDtoHKD	<input type="text" value="0.21"/>	<input type="button" value="edit"/> <input type="button" value="delete"/>
123	SGDtoHKD	<input type="text" value="5.55"/>	<input type="button" value="edit"/> <input type="button" value="delete"/>
<input type="button" value="calendar"/>	dateFrom	<input type="text" value="Day"/> <input type="text" value="M/d/yyyy"/> <input type="button" value="calendar"/>	<input type="button" value="edit"/> <input type="button" value="delete"/>
<input type="button" value="calendar"/>	dateTo	<input type="text" value="Day"/> <input type="text" value="M/d/yyyy"/> <input type="button" value="calendar"/>	<input type="button" value="edit"/> <input type="button" value="delete"/>

# Report views

- Each report is composed of views
- View types include:
  - Tables
  - Charts
  - Maps
  - KPI labels
  - Custom content
  - Filters



# Creating views

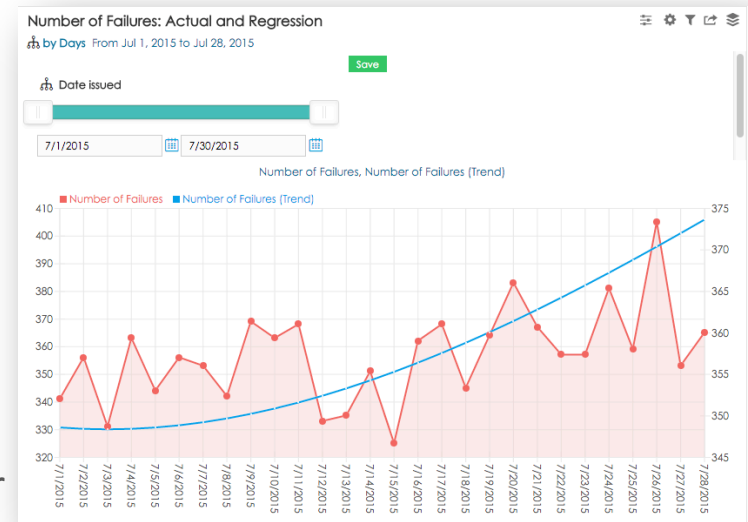
- Must be in **edit mode** in order to create view
- Select desired **view type**
- Navigate **wizard** to complete the task





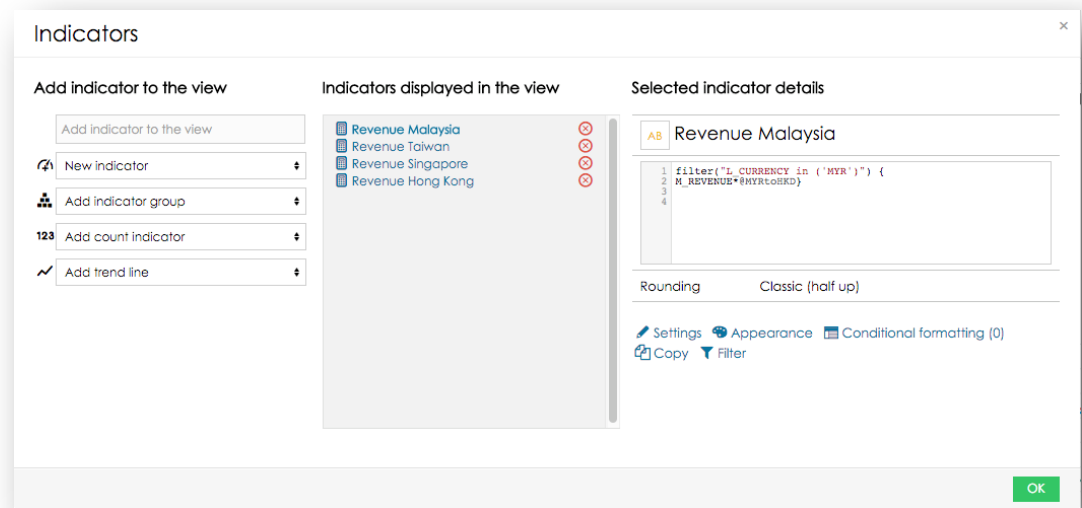
# Basic view controls

- In-line name editing
- Variables (custom filter components)
- View settings dialog (specific by view type)
- Quick operations – drill-down, indicators, appearance settings, associated views
- Save / revert function
- Filter conditions
- Export
  - PDF, PNG, XLS (tables only)
  - Embed as iFrame, create link
    - permissions are checked against the creator
    - many variables – hideHeader, hideLink, ...
- Publish to dashboard



# Displaying indicators

- Indicators represent values in views
- Select / create indicators
- Setup appearance / conditional formatting
- **Modify**
  - Unit
  - Format
  - Rounding
  - Aggregation
  - Formula
- **Duplicate indicator**



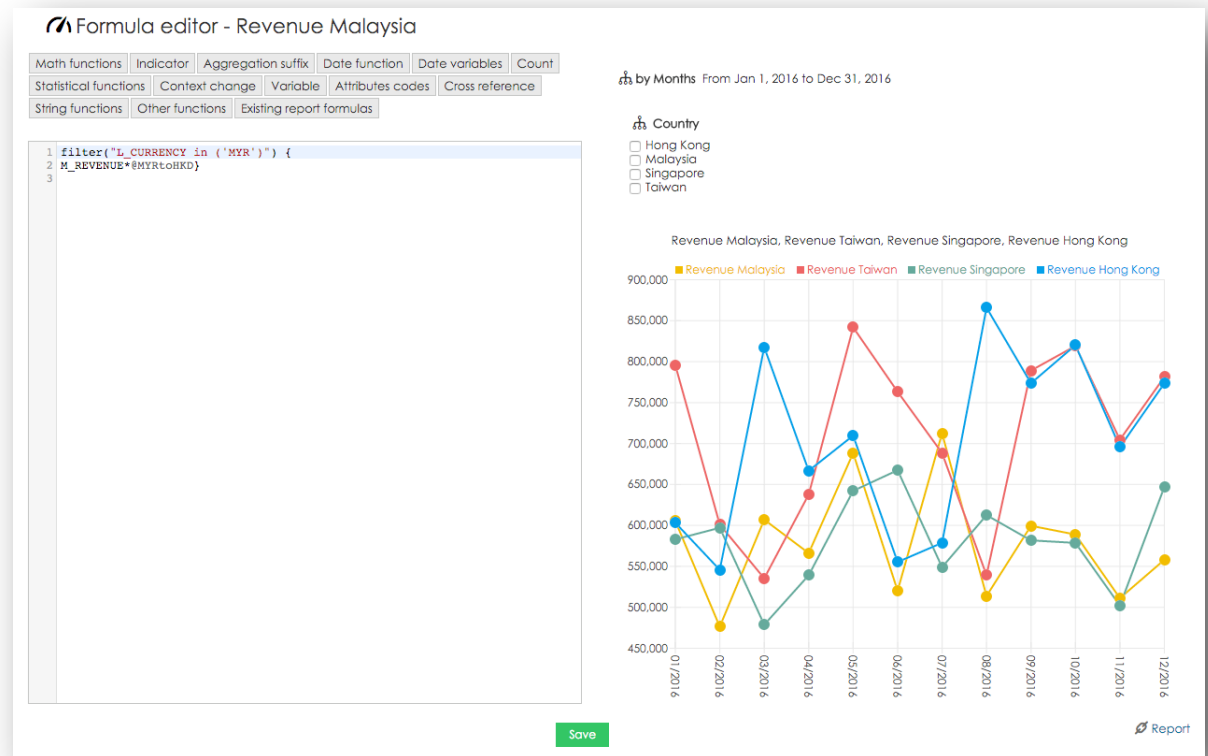
# Working with indicator formulas

- **Common formula use cases:**
  - Counting frequency
  - Frequencies by categories
  - Frequencies by categories and regions
  - Getting the latest available value
  - Average cumulated payments during financial year

The screenshot displays a software interface for creating formulas. At the top, there are two rows of buttons representing different function categories: Math functions, Indicator, Aggregation suffix, Date function, Time function, Date variables, Count, Statistical functions, Context change, Variable, Attributes codes, Cross reference, String functions, Other functions, and Existing report formulas. Below these buttons is a text input area where a formula is entered: "1 100 - M\_TOTAL\_PRICE@AVG". The number "1" is in a light blue highlighted cell, likely representing a row or column index.

# Working with indicator formulas

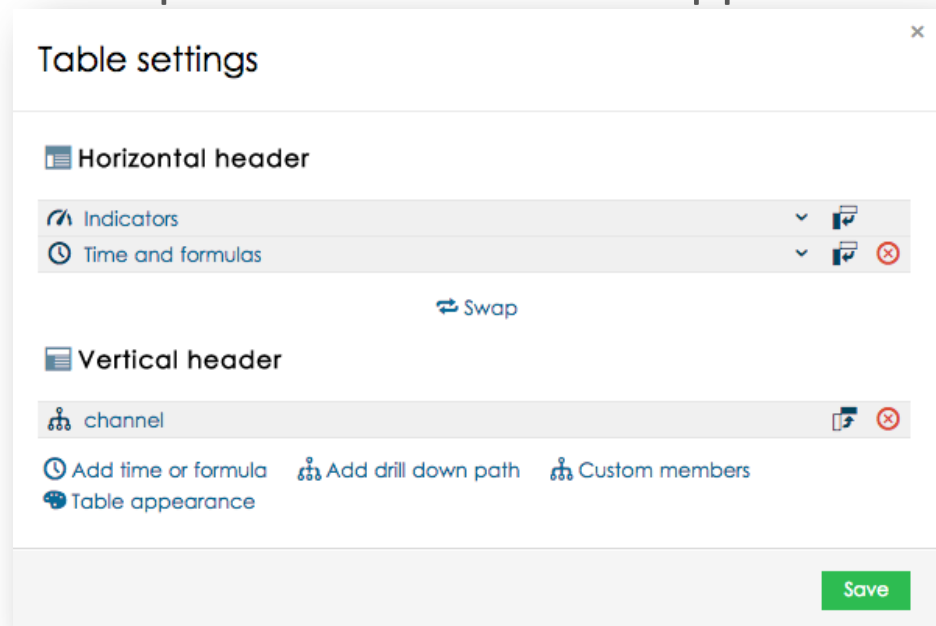
- Formula editor – formula debugging with instant results



# Working with tables

- **Table settings**

- Swap horizontal/vertical header, switch between horizontal/vertical, change order
- Add/remove time entries – multiple time entries are supported
- Add/remove drill-down
- Custom members
- Table appearance



# Working with tables

- **In-table operations:**
  - Sort results
  - Swap axis
  - Translation and appearance
  - Drill-down (add, remove, change position)
  - Comments
  - Quick chart
  - Source data

Weekly Flight CTR per Channel						
channel	13		14		15	
	affiliates	↑	0.36	↓	0.13 -63.33%	↑
crm	↑	0	↑	0	↑	0
direct	↑	0.16	↑	0.18 +12.85%	↓	0.17 -3.77%
distribution	↑	0.14	↑	0.17 +18.23%	↓	0.13 -23.84%
dist-synd	↑	0	↑	0	↑	0
organic	↑	0.19	↑	0.4 +111.43%	↓	0.19 -53.7%

# Filtering data

- Filter according attribute(s) / indicator(s)
- Apply conditions to multiple values
- Combine multiple conditions with AND / OR

### Filter settings

Attributes

+ Logical operation Click to build the filter

AND + Attribute filter

visit\_location\_country contains FR GB

Indicators

+ Logical operation Click to build the filter

AND + Indicator filter

total\_price row level greater than 10000

Close

# Displaying raw cell data

- Displays all records composing the cell
- Click on cell to open the dialog

Total Opportunities vs Sales

Month	SHOWROOM UPS
Dec 2013	287
Jan 2014	259
Feb 2014	237
Mar 2014	259
Apr 2014	
May 2014	
Jun 2014	
Jul 2014	208

Clicking on the cell for Mar 2014 (259) opens a dialog box with a data icon and an "Add comment" button.

Source data

Date	Date	DealerName	DealerName	DealerName id
1/01/2014	1/01/2014	GERMAIN BMW	GERMAIN BMW	12
1/01/2014	1/01/2014	GERMAIN BMW	GERMAIN BMW	12
1/01/2014	1/01/2014	GERMAIN BMW	GERMAIN BMW	12
1/01/2014	1/01/2014	GERMAIN BMW	GERMAIN BMW	12
1/01/2014	1/01/2014	GERMAIN BMW	GERMAIN BMW	12
1/01/2014	1/01/2014	GERMAIN BMW	GERMAIN BMW	12
1/01/2014	1/01/2014	GERMAIN BMW	GERMAIN BMW	12
1/01/2014	1/01/2014	GERMAIN BMW	GERMAIN BMW	12
1/01/2014	1/01/2014	GERMAIN BMW	GERMAIN BMW	12
1/01/2014	1/01/2014	GERMAIN BMW	GERMAIN BMW	12
1/01/2014	1/01/2014	GERMAIN BMW	GERMAIN BMW	12
1/01/2014	1/01/2014	GERMAIN BMW	GERMAIN BMW	12
1/01/2014	1/01/2014	GERMAIN BMW	GERMAIN BMW	12
1/01/2014	1/01/2014	GERMAIN BMW	GERMAIN BMW	12
1/01/2014	1/01/2014	GERMAIN BMW	GERMAIN BMW	12
1/01/2014	1/01/2014	GERMAIN BMW	GERMAIN BMW	12
1/01/2014	1/01/2014	GERMAIN BMW	GERMAIN BMW	12
1/01/2014	1/01/2014	GERMAIN BMW	GERMAIN BMW	12
1/01/2014	1/01/2014	GERMAIN BMW	GERMAIN BMW	12
1/01/2014	1/01/2014	GERMAIN BMW	GERMAIN BMW	12

Save as CSV Save as ZIP Records count: 14



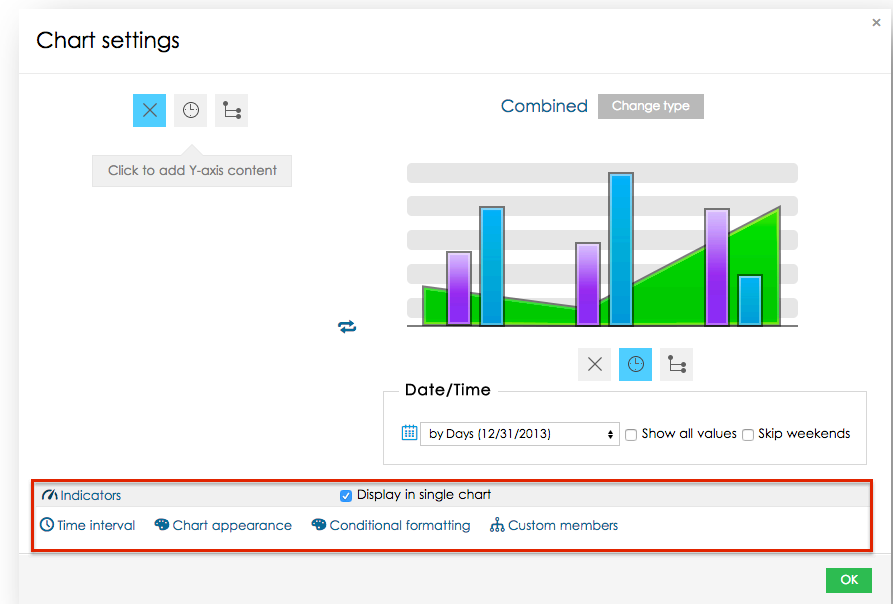
# Working with charts

- **Supported charts:**

- Pie chart
- Bar chart
- Stack bar chart
- Line chart
- Horizontal scatter chart
- Scatter chart
- Horizontal bar chart
- Horizontal stack bar chart
- Horizontal heat map
- Candle chart
- Thermometer
- Funnel
- Speedometer
- Combined chart
- Gantt chart
- Radial chart
- Tree map
- Bullet chart
- Horizontal bullet chart

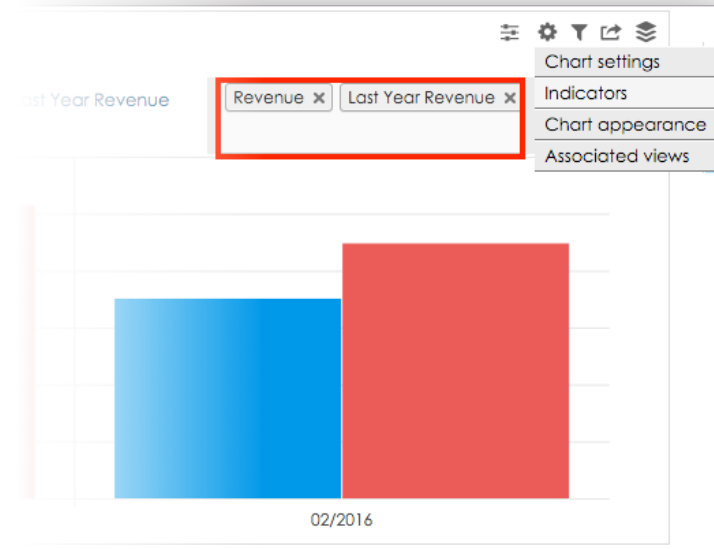
# Working with charts

- **Chart settings**
  - Drill down
  - Conditional formatting
  - Select indicators or create new
  - Date/time axis
  - Chart appearance
  - Change chart type
  - Set time interval



# Working with charts

- **In-chart operations:**
  - Sort results
  - **Quickly change indicators**
  - Drill-down
  - Translation and appearance
  - Display source data
  - Comments
  - Apply filter on associated views

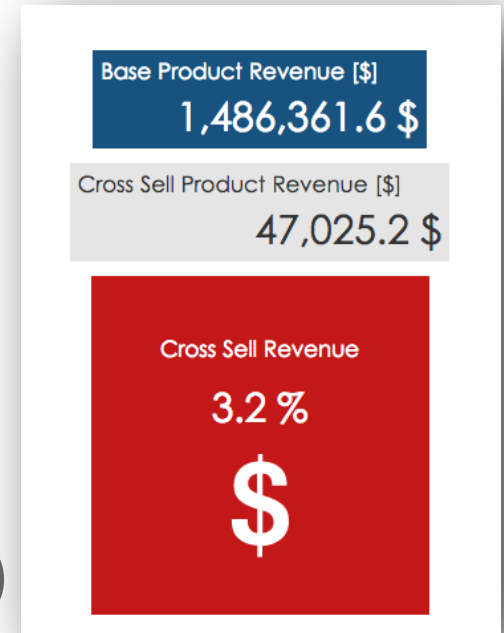


# Chart appearance

- **Chart appearance**
  - Specify Color theme and Title color
  - Separate to columns
  - Value range
  - Chart axis: Hide X axis, Hide Y axis
  - Members on horizontal axis
  - Group values
  - x/y axis label
  - Show values
  - Agenda positioning

# Working with KPI labels

- **KPI labels allow you to clearly monitor important indicator values**
- **KPI label settings**
  - Add to dashboard
  - Select indicators or create new
  - Setup conditional formatting
  - Move, clone and delete KPI label
  - Label appearance (size, color, shape symbol)



# Time interval

- Defines time period which will be displayed in the view
- Available in charts, tables and KPI labels
- Different interval types
- Specify date aggregation
- Specify time aggregation

Chart settings - Interval settings

**Date settings**

Date interval View displays values limited to the following interval:

Interval type  Relative  Absolute  Custom

Show interval as: Week

From: @From To: @To

Use last day of the interval

[Set according to data availability](#)

**Time settings**

Time interval View displays values from the following time interval:

Show interval as: Hour

Interval type  Relative  Absolute  Custom

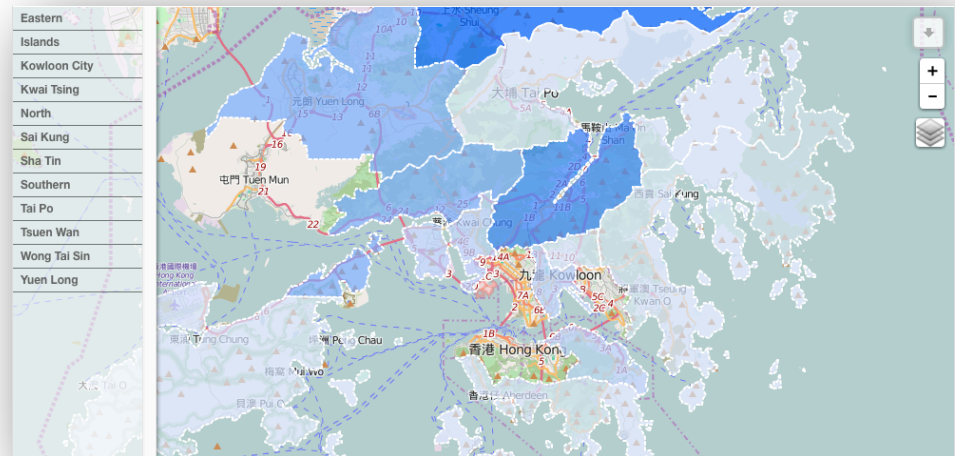
From: 13:00 To: 14:59

[Set according to data availability](#)

Back Save

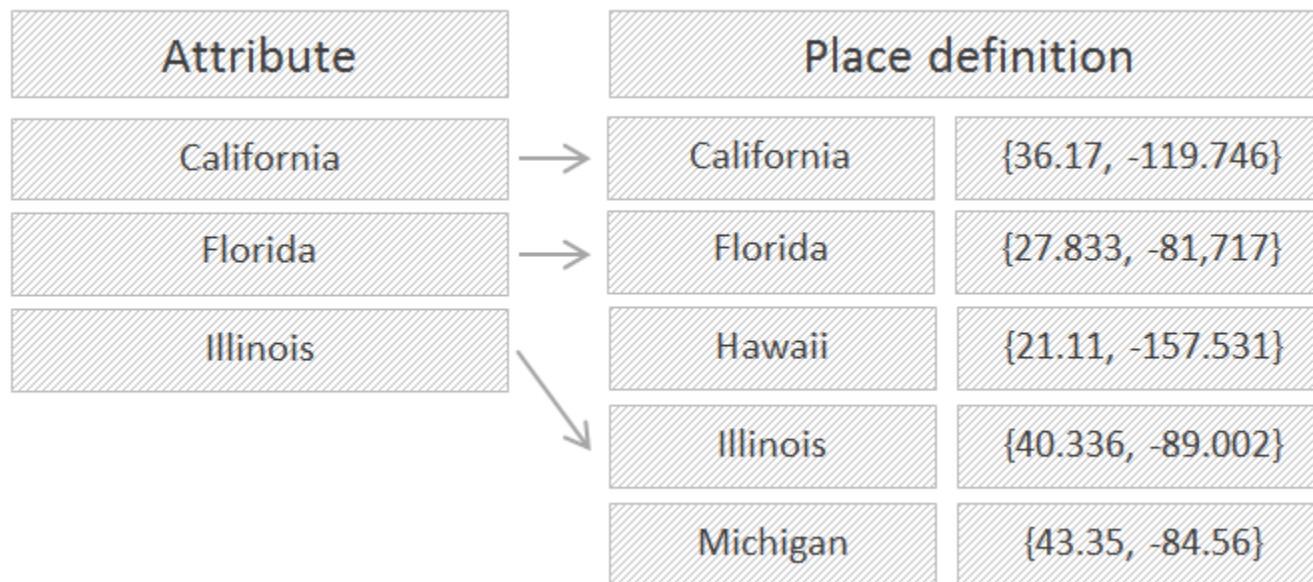
# Working with GEO maps

- GEO map allows to observe data on interactive map
- GEO map settings
  - Select indicator or create new
  - Setup drill-down settings (used drill down, places definition, map provider)
  - Add to dashboard
  - Define Date/time interval



# Place definition

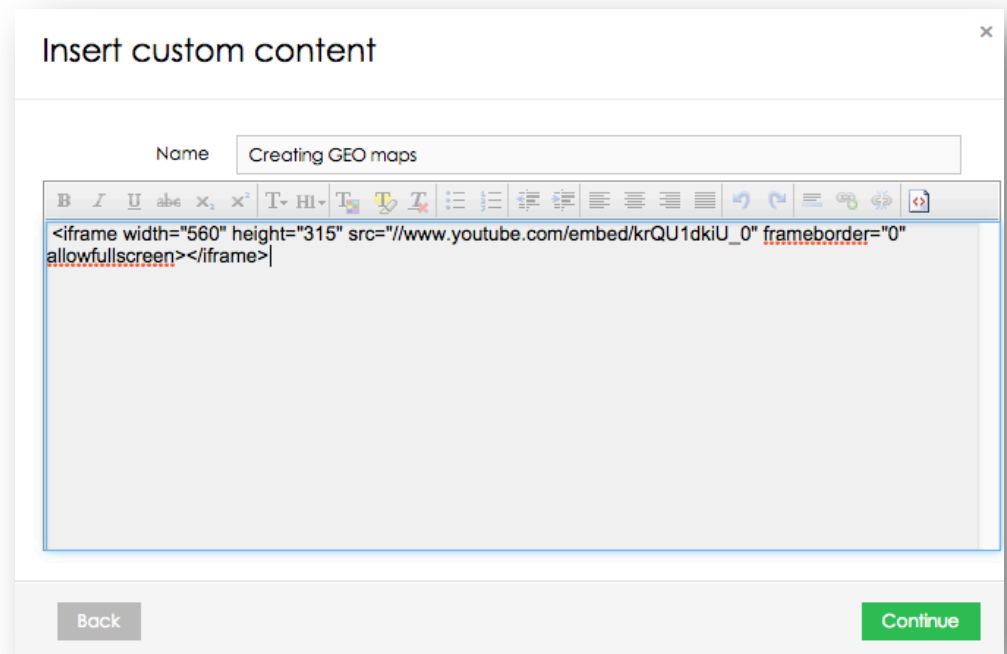
- Define the place definition
  - **attribute** maintains the indicator categorization
  - **place definition** keeps pairs of location identification and its





# Working with custom content

- Rich text editor available
- Switch to HTML mode to embed videos, pictures, etc.
- Display views from other reports using the iFrames



# Working with filter views

- Create custom component which allow you to filter report
- No need to open Filters and variables panel

The screenshot displays a 'Filter view' window with four filter components:

- Campaign name contains:** A list of campaign names including 'Conference London 2011', 'Conference London 2012', 'Email campaign - Resources', 'Partners Level A', 'Partners Level B', 'Referral campaign 3', and 'Referral campaign 4'.
- Stage Name contains:** A dropdown menu with a downward arrow.
- Date contains:** A date range selector with a green bar, showing dates '20/08/2012' and '22/08/2012' with calendar icons.
- Type contains:** A list of checkboxes for 'Existing Business' and 'New Business'.

# Applying variables in indicators

- Syntax to reference variable: @parameter
- Supported in autocomplete
- Can serve as basic planning and forecasting tool

'Amount (USD)' - Indicator setting

**Basic settings**

Amount (USD)  Minutes

\$ Rounding Classic (half up)  Replace empty values  Exclude from aggregation

Show help

**Advanced settings**

Math functions Indicator Aggregation suffix Date function Time function Date variables Count Statistical functions

Context change Variable Attributes codes Cross-reference String functions Other functions Existing report formulas

1 M\_AMOUNT \* @USDtoEUR

**Variables and filters**

USD/EUR Exchange Rate (USDtoEUR)

Date for time interval (from):

Date for time interval (to):

# Applying variables in date/time

- Syntax to reference variable: @parameter
- Need to select custom interval type

Chart settings - Interval settings

**Date settings**

Date attribute: L date

Date interval View displays values limited to the following interval:

Interval type:  Relative  Absolute  Custom

Show interval as: Month

From: @from To: @to

Use last day of the interval

Set according to data availability

**Time settings**

Time attribute: L time

Time interval View ignores time entries and aggregates data to day-level.

Back Save

**Variables and filters**

USD/EUR Exchange Rate (USDtoEUR): 1.3

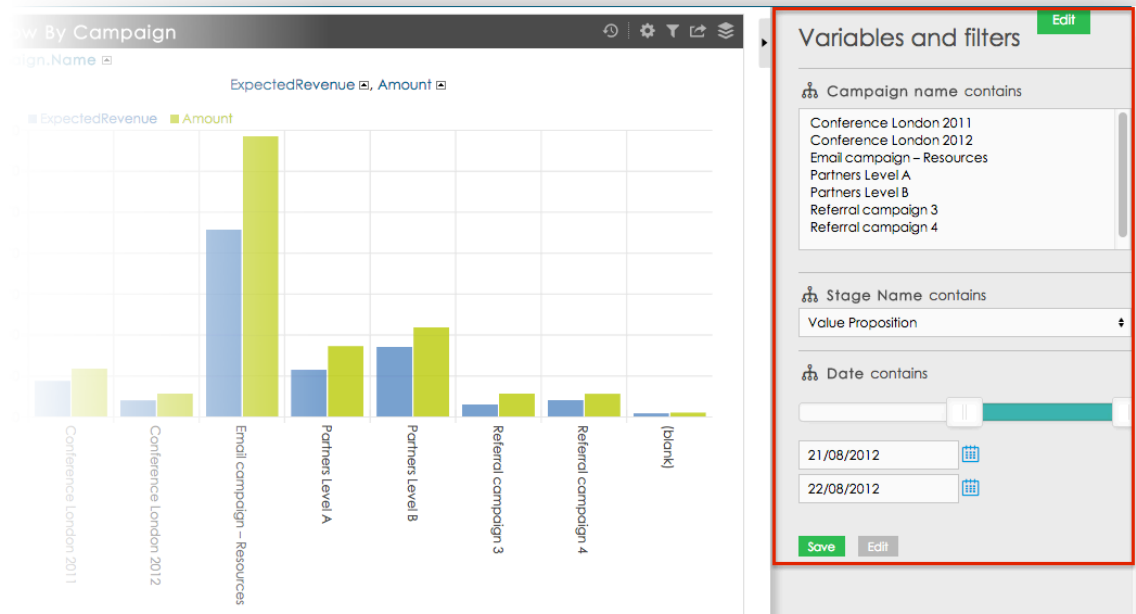
Date for time interval (from): 1/01/2015

Date for time interval (to): 31/01/2015

Save Edit

# Applying filters

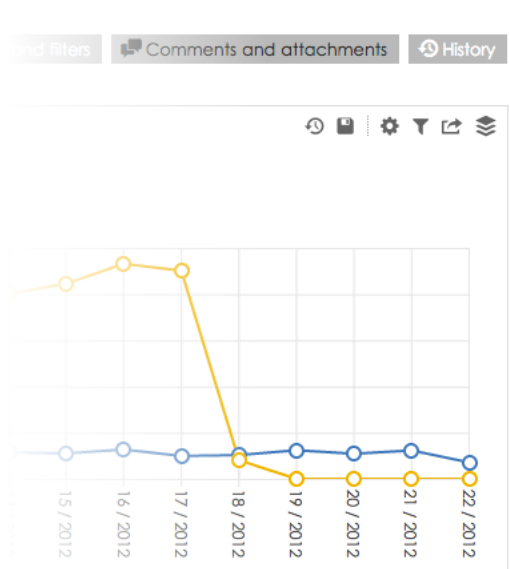
- Can be applied as global filters or apply to one view only
- Can be changed from variables panel
- Can be displayed as custom components (select, multiselect, check box , radio)
- Available or selected values



# Report comments, attachments

- Comments for the whole report
- Comments on numbers directly in tables and charts
- You can track the conversion on the dashboard

2011			
15	16	17	18
0.86 -31.86% ↑	1.7 +98.9% ↓	1.07 -37.1% ↑	2.76 +157.82%
0 ↑	0 ↑	0 ↑	0
2.28 -45.79% ↓	1.85 -18.6% ↑	2.11 +13.87% ↓	1.43 -32.21%
0.86 -75.13% ↑	2.05 -40.4% ↓	1.97 -36.55% ↑	3.24 +64.97%
0 ↑	0 ↑	0 ↑	0
0.91 -70.1% ↑	1.85 -18.6%	1.57 -5.06% ↑	1.9 +20.92%
		0 ↑	0
		0 ↑	0
		0.05 ↓	0 -100%
	8.32	6.78	9.34



### Attachments

Flight searches.pdf  
Add attachment

### Comments

[Add comment](#)

**Radek Micka2**  
What is the main reason of changes in flight searches?



BellaDati

# Q&A

