Elixir Ad-hoc Report

Release 3.0.0

Elixir Technology Pte Ltd

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Elixir Technology Pte Ltd

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Chapter 1
Introduction

Elixir Ad-hoc Report is a Web application that enables the designing and navigation of Business Intelligence reports. Ad-hoc Report provides several categories of bands for you to design tailor-made reports with numerous pieces of useful information, including tables, charts, cubes, images, date, time and user-input text. Ad-hoc Report features drag & drop editing without any requirement of writing code. You can easily create custom reports in a few clicks.

An Ad-hoc Report has two modes - the **Analysis** mode for editing and the **Report** mode for viewing. The modes can be easily changed to fit into different situations.

The two modes help you maintain user permissions according to your organization's access policies. Certain users might only be given viewing permissions and not editing permissions. Those users can view the reports in repost mode. For example, the default user called `test` has only viewing permissions.

You can easily structure your report into different sections by adding section breaks as required. This helps to organize the report cleanly and present the info in a clear and concise format to the user.

You can easily preview the report in real time, as you construct your report, by clicking the various bands.

Navigate to http://<host>:8080/elx/ to view the Elixir Ambience Web Console. Type the domain name (for example, "eno", "foxx", etc), user name and password to sign in.

The default domain is `eno`. The default user name is `admin`. The default password is `sa`.

Report Level Actions

This section describes the various report level actions.

Creating an Ad-hoc Report

Navigate to http://<host>:8080/elx/ to view the Elixir Ambience Web Console. Type the domain name (for example, "eno", "foxx", etc), user name and password to sign in. After signing into the Elixir Ambience Web Console, you can create an Ad-hoc Report by completing the following steps:

1. Navigate to the **Create** tab, click **Ad-hoc Report**, and click the universe (in the following screen shot, CARS is the universe that is present) in which to create the report.

Figure 1.1. Report Main Screen

2. Select a location in the repository from the drop-down list. Enter the file name for the report in the Filename field. Click **Create**. A blank Ad-hoc Report opens in the **Analysis** mode, ready for editing. Read on for more detailed information.

Filtering Information

To filter information in all bands to just the information you want to view:

1. Click the Filter icon (⬆).

2. Click the Add Filter icon (➕)

3. Select the columns to filter as shown:

Figure 1.2. Select Filter Columns

4. Enable the filters as desired. An example is as follows:

Figure 1.3. Enable Filters

To add more filters, click the Add Filter icon (➕).

To delete a filter, click the Delete Filter icon (🗑).

> **Note**
>
> You can only filter on dates and enumerated fields (nominals and ordinals). Database administrators who design the Universe, decide on which fields are enumerated and can be filtered.

Saving an Ad-hoc Report

To save your Ad-hoc Report, complete one of the following:

- Click the **Save** button. A message pops up, saying **"Save successful"**.

- Click the **Save As...** button. The `Save As` window opens, allowing you to select a location in the repository and enter the new file name.

Viewing an Ad-hoc Report

When you need to view your work-in-progress Ad-hoc Report, click the **Report** button. The output of the Ad-hoc Report displays in the browser.

Publishing an Ad-hoc Report

To publish an Ad-hoc Report, click the **Publish** button. The `Publish As` window opens, allowing you to select a location in the repository and enter the new file name. By default, the new file name will end with `-published.report` to distinguish it from the original editable report. If you launch the published report later by opening it from **Ambience Web Interface > Repository**, it displays as a read-only report in the browser.

After publishing your report, you can view it as many times as you want. Users only need to have view permisions to view the report.

> **Note**
>
> One Ad-hoc Report can have multiple published files. Even if the original editable report is deleted, the published reports will still exist and allow viewing, though there might be errors during record loading.

Deleting an Ad-hoc Report

Deleting an Ad-hoc Report is done from **Ambience Web Interface > Repository**. Locate the Ad-hoc Report file in the repository, click the file and click **Delete** from the right pane.

Band Level Actions

This section describes the various band level actions of an Ad-hoc Report. The following instructions apply to all categories of bands and the Section Break option.

Creating a Band

Complete the following steps to create a Band:

1. From the Ambience Web Interface, click **Repository**, to open an existing Ad-hoc Report, or create a new one. The report is opened in **Analysis** mode, ready for editing.

2. Click **Information Band / Table Band / Chart Band / Pivot Band / Section Break**. A blank Band is created.

3. You have the option to rename the Band by entering a new name in the text field below the Band title on the left pane.

Figure 1.4. Report Bands

Moving a Band

You have the option to move a Band to an upper or lower position in the band list. Click the **Move Up** ( ) or **Move Down** ( ) button on the Band according to your needs.

Deleting a Band

Complete the following steps to delete a Band:

1. Click the **Delete Band** ( ) button on the Band.

2. A message displays, asking **"Are you sure you want to delete this band?"** Click **Yes** to confirm deletion.

Chapter 2
Information Band

This chapter describes how to add the following elements to the left, centre or right side of an Information Band. Expand the **Left**, **Centre** or **Right** drop-down lists, and follow the instructions to add the elements you want.

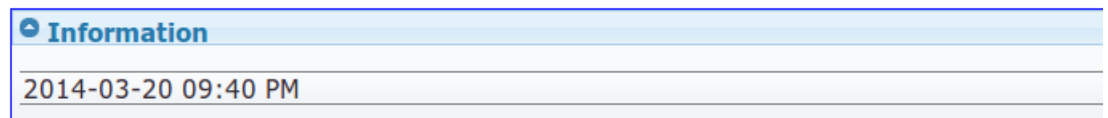**Figure 2.1. Report Elements for the Information Band**
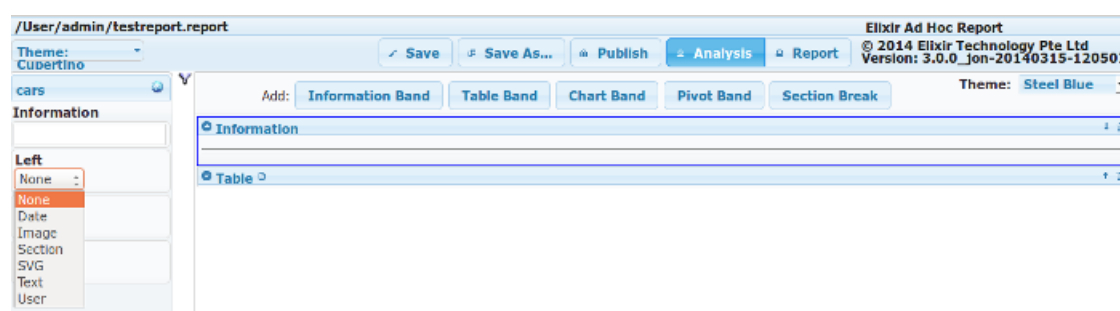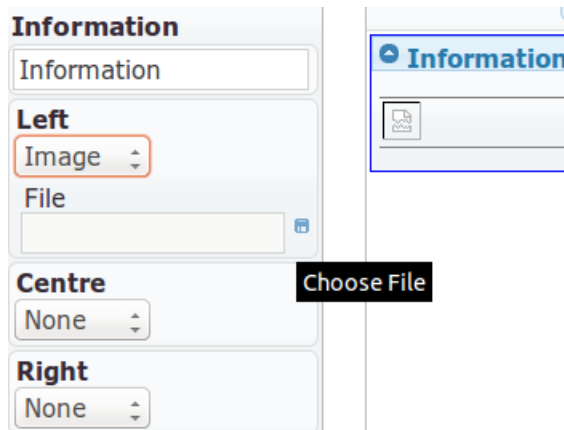

Adding a Date element

Figure 2.2. Date Element for the Information Band
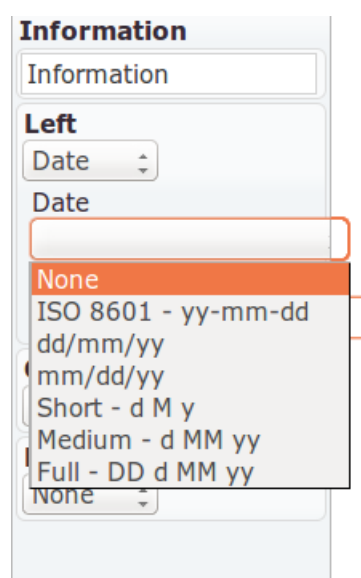
1. Select **Date** from a drop-down list as required.

2. Select a date format from the **Date** drop-down list.

3. Select a time format from the **Time** drop-down list.

4. Expand the corresponding band on the right pane to view the output.
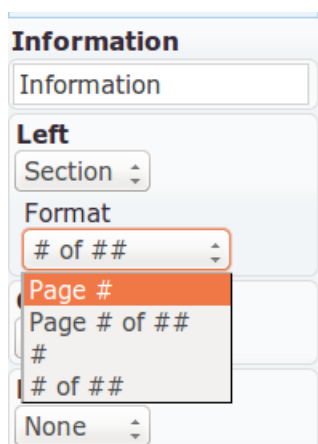
Figure 2.3. Date Output for the Information Band

Adding an Image element

Figure 2.4. Image Element for the Information Band

1. Select **Image** from a drop-down list as required.

2. Click the **Choose File** icon. The `Choose Image` window opens. Locate the image file (GIF, PNG or JPG format) from Repository.

3. Expand the corresponding band on the right pane to view the output.

Adding a Section element

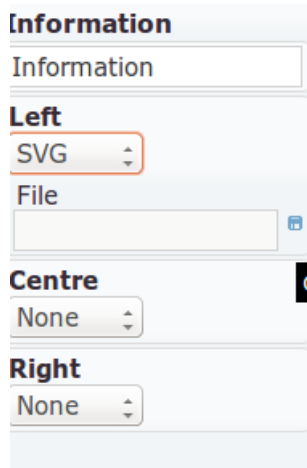The Section element allows you to organize your report into various HTML sections for clarity.

Figure 2.5. Section Element for the Information Band

1. Select **Section** from a drop-down list as required.

2. Select a page number format from the **Format** drop-down list.

3. Expand the corresponding band on the right pane to view the output.

Adding a SVG element
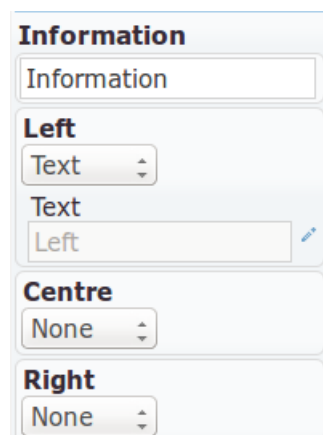
Figure 2.6. SVG Element for the Information Band

1. Select **SVG** from a drop-down list as required.

2. Click the **Choose File** icon. The `Choose SVG` window opens. Locate the SVG file from Repository.

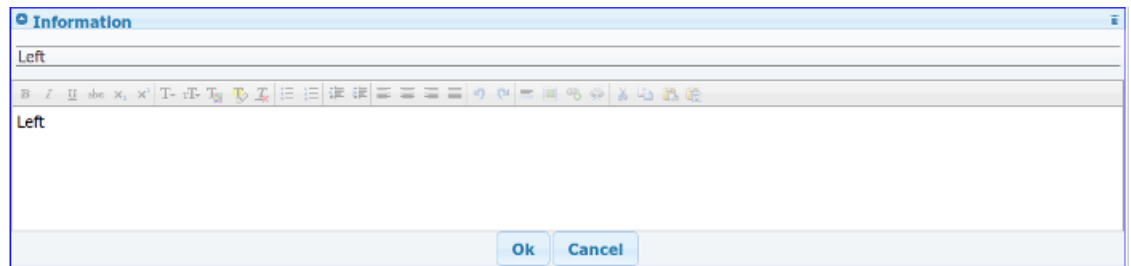3. Expand the corresponding band on the right pane to view the output.

Adding a Text element

**Figure 2.7. Text Element for the Information Band**

1. Select **Text** from a drop-down list as required.

2. Click the **Edit Text** icon. An embedded Text Editor opens on the right pane. Input your text and customize the format.

Figure 2.8. Text Element Editor for the Information Band

3. Expand the corresponding band on the right pane to view the output.

Adding User information

Figure 2.9. User Element for the Information Band
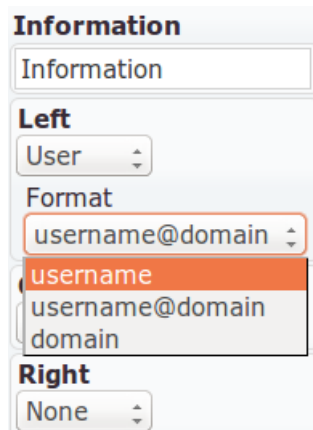
1. Select **User** from a drop-down list as required.

2. Select a user name or domain format from the **Format** drop-down list.

3. Expand the corresponding band on the right pane to view the output.

You also have the option to select **None** from a drop-down list. This will leave the specific area of the Information Band blank.

Chapter 3
Table Band

This chapter describes how to add Groups and Fields to a Table Band. After you finish designing the report, you can export a Table Band to Excel by clicking the `Export to Excel` icon: **Export Excel**.
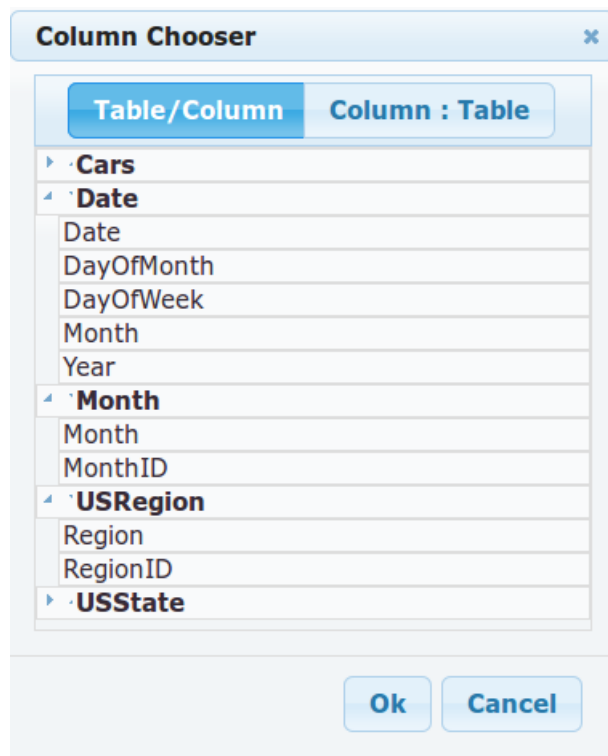
Figure 3.1. Export to Excel
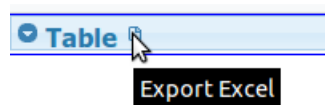
Perform the following actions to add elements to the Table Band.

Figure 3.2. Report Elements for the Table Band

Adding Groups

1. Click the **Add Column** icon (+) that is below **Groups**. The `Column Chooser` window opens.

Figure 3.3. Column Chooser for the Table Band

2. Select one or more columns from the window. Click **OK**.

3. Expand the corresponding band on the right pane to view the output. There will be embedded tables, and the upper column will contain the lower column, while the lowest column in **Groups** will contain the highest column in **Fields**.
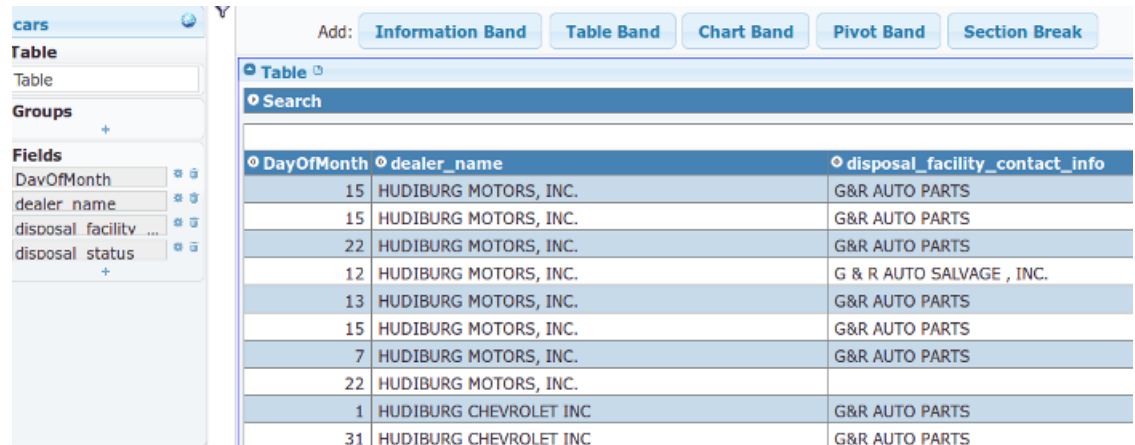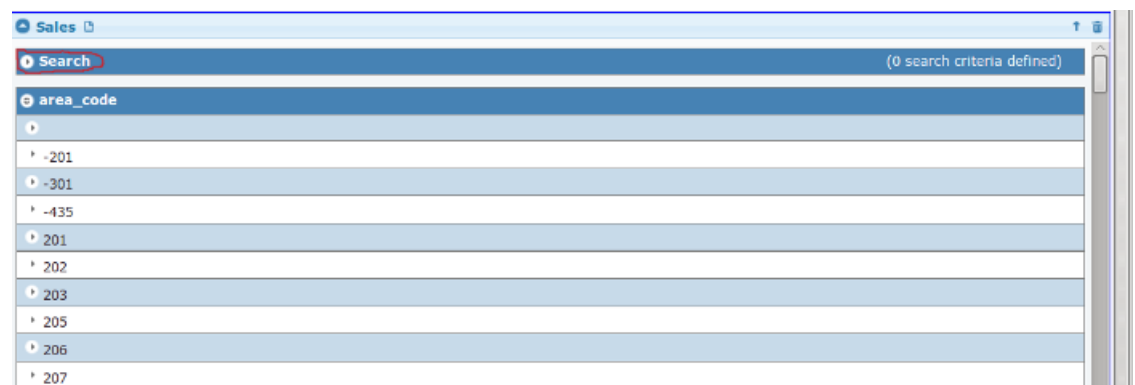
Figure 3.4. Group Output for the Table Band

Adding Fields

1. Click the `Add Column` icon ( ) that is below **Fields**. The `Column Chooser` window opens.

2. Select one or more columns from the window. Click **OK**.

3. Expand the corresponding band on the right pane to view the output. There will be embedded tables, and the upper column will contain the lower column, while the lowest column in **Groups** will contain the highest column in **Fields**.

Figure 3.5. Field Output for the Table Band

Searching Information

To search a report in a table band and filter information:

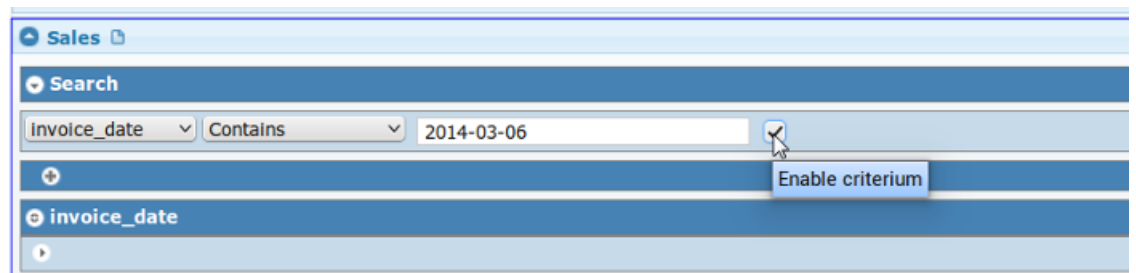1. Click Search, as shown:

Figure 3.6. Search Table Band

2. Click the `Add Criteria` icon .

3. Define the search criteria and enable it. An example is shown as follows:

Figure 3.7. Search Table Criteria

To add more search criteria, click the Add Criteria icon .

To delete a search criteria, click the Remove Criterium icon .

Chapter 4
Chart Band

This chapter describes adding a variety of charts to your report. Charts enhance the visual appeal of the reports and help the user discern the information easily. Each type of chart contains its own set of properties. Follow the instructions to get started with chart designing.

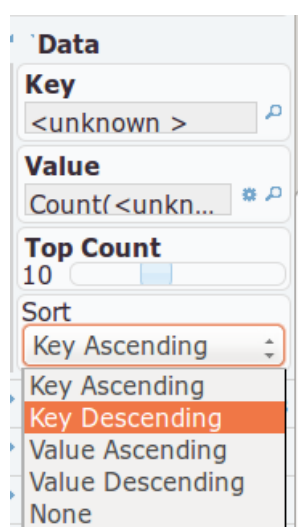**Figure 4.1. Report Elements for the Chart Band**
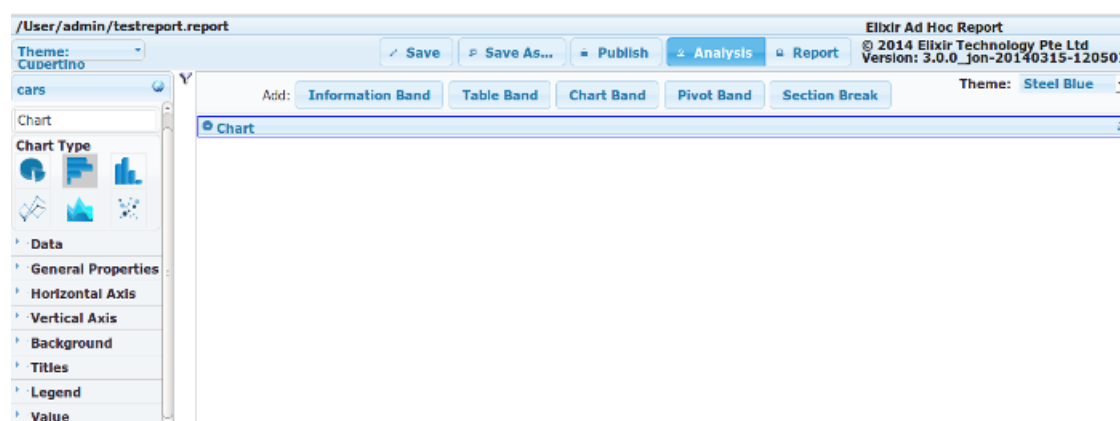

Common Properties

This section lists the properties that are common to all the chart types.

• Data:

Figure 4.2. Data Properties

• Key: Describes the fields used to group the data. Click the **Choose Column** icon (🔍). The `Column Chooser` window opens. Make your selection as required.

- Value: The values to be plotted on the chart. Click the **Choose Column** icon (🔎). The `Column Chooser` window opens. Make your selection as required.

  After adding a column, you have the option to edit it by clicking the **Edit Column** icon (⚙). Available operations include Average, Count, Count Distinct, Min, Max, Standard Deviation, Sum, and Variance.

  - Sort: Sorts the data before plotting. Available sorting options include Key Ascending, Key Descending, Value Ascending, Value Descending, and None.

- General Properties:

Figure 4.3. General Properties
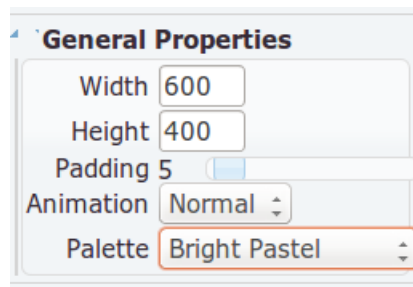
- Width: Width of the chart in pixels.

- Height: Height of the chart in pixels.

- Padding: Padding properties insert some separation between the item and the surrounding graphics. They can be used to tweak the charts to prevent certain items overlapping.

- Palette: Denotes the colour shades for the chart.

- Background: Lets you choose how to fill the background - either solid or gradient. Select the desired background colours from a wide range of colour options. You can also customize the border, by specifying border width, radius and colour.

Figure 4.4. Background Properties
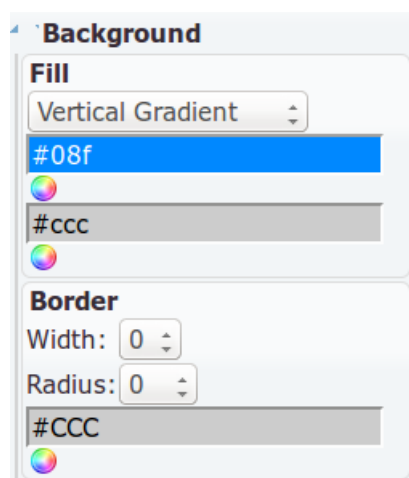
- Titles: Set the formats for titles and subtitles, including position, alignment, rotation, font and colour.
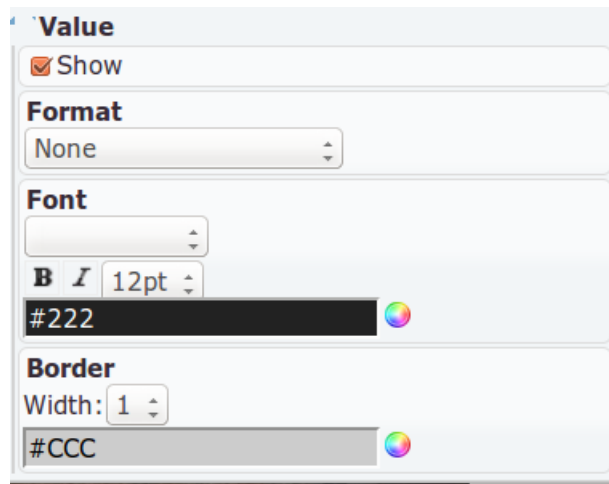
Figure 4.5. Title Properties

- Legend: Set the legend style, including position, alignment, font, colour, and fill pattern.

Figure 4.6. Legend Properties

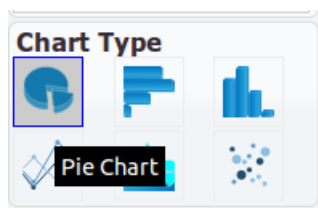- Value: Allows you to customize the display of values. Available options include whether to show or hide the Value, position, padding, font, colour, and border properties.

Figure 4.7. Value Properties

Pie Chart

Figure 4.8. Pie Chart

The properties are as described in the section called "Common Properties".

In addition, the following property is unique to Pie Charts:

Top Count: Indicates the number of largest values to plot. Drag the slider to set the top count.

Bar Chart

Figure 4.9. Bar Chart

- Data:

  The properties are as described in the section called "Common Properties".

  In addition, you can set the following Data properties for Bar Charts.

  - To add more columns, click the **Add Column** icon (the + sign), and select another column from the Column Chooser window. To delete an unwanted column, click the **Delete Column** (the Trash Bin sign) icon.

- Series: Indicates the order in which the data is to be sorted and displayed. The options are Ascending, Descending and None (which displays the data as-is without sorting it.)

- Invert Data: Selecting this option enables you to invert data (swap data) from **Key** and **Values**. The vertical axis and the chart output will also change.

- General Properties: The properties are as described in the section called "Common Properties". In addition, you can set the following General Properties for Bar Charts:

  - Horizontal Axis: Allows you to customize the appearance of the X-axis, labels and stripes.

    Figure 4.10. Horizontal Axis

  - Vertical Axis: Allows you to customize the appearance of the Y-axis, labels and stripes.

    Figure 4.11. Vertical Axis

- Background: The properties are as described in the section called "Common Properties".

- Titles: The properties are as described in the section called "Common Properties".

- Legend: The properties are as described in the section called "Common Properties".

- Value: The properties are as described in the section called "Common Properties".
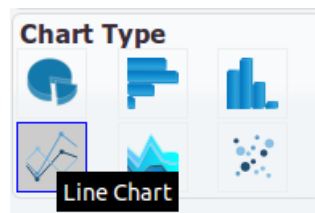
Column Chart

Figure 4.12. Column Chart

The properties are as described in the section called "Bar Chart".

Line Chart

Figure 4.13. Line Chart

The properties are as described in the section called "Bar Chart".

In addition, there are two Data properties that are specific to Line Charts.

- X Value: Click the **Choose Column** icon ( ). The Column Chooser window opens. Make your selection as required.

  The values from the selected column are plotted on the X-axis.

- Y Value: Click the **Choose Column** icon ( ). The Column Chooser window opens. Make your selection as required. After adding a column, you have the option to edit it by clicking the

  Edit Column icon ( ). Available operations include Average, Count, Count Distinct, Min, Max, Standard Deviation, Sum, and Variance.

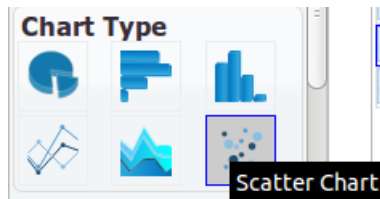 The values from the selected column are plotted on the Y-axis.

Area Chart

Figure 4.14. Area Chart
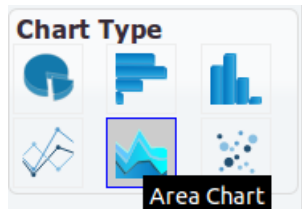
The properties are as described in the section called "Line Chart".

Scatter Chart

Figure 4.15. Scatter Chart


The properties are as described in the section called "Bar Chart".

In addition, there are two properties that are specific to Line Charts.

• R Value (Data Property): This sets the selected data column to be the scaled radius of the individual points (bubbles) of the chart .

• Bubble: Allows you to set the radius and the opacity level of the individual points (bubbles) of the chart.

Figure 4.16. Scatter Chart Bubble Properties
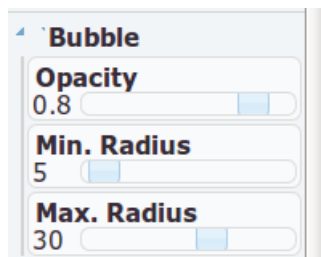
Chapter 5
Pivot Band

This chapter shows how to add a Cube to your report, which makes it convenient to visualize multi-dimensional data. Follow the instructions to customize your Cube by setting a few properties.

- Columns: Click the **Add Column** icon (+). The Column Chooser window opens. Make your selection as required. You have the option to add multiple columns, or delete the unwanted columns.

- Rows: Click the **Add Row** icon (+). The Column Chooser window opens. Make your selection as required. You have the option to add multiple columns, or delete the unwanted columns.

- Measures: Click the **Add Column** icon (+). The Column Chooser window opens. Make your selection as required. You have the option to add multiple columns, or delete the unwanted columns.

- Row Header: Available options include showing the row's root, totals, totals first and header labels, enforcing hierarchical levels, as well as naming the row's root label and total label.

- Column Header: Available options include showing the column's root, totals, totals first and header labels, enforcing hierarchical levels, as well as naming the column's root label and total label.

The following screenshot shows an example of a Pivot Report.

Figure 5.1. Example of a Pivot Report

		All	Northeast	Midwest	South	West
		Count[area_code]	Count[area_code]	Count[area_code]	Count[area_code]	Count[area_code]
	All	33831	6636	9331	11055	6809
	AK	58	0	0	0	58
	AL	377	0	0	377	0
	AR	279	0	0	279	0
	AZ	458	0	0	0	458
	CA	3827	0	0	0	3827
	CO	421	0	0	0	421
	CT	465	465	0	0	0
	DC	1	0	0	1	0
	DE	133	0	0	133	0
	FL	1704	0	0	1704	0
	GA	828	0	0	828	0
	HI	92	0	0	0	92
	IA	437	0	437	0	0

Chapter 6
Section Break

This chapter describes the simple step of adding a Section Break.

Adding section beaks allows you to organize your report into multiple HTML sections for clarity.

Click **Section Break**. You will see a new Section Break immediately showing in your report.

Chapter 7
# Report Walkthrough - Creating Your Report

This chapter walks you through creating an example report step-by-step. To create a report:

1. Login to the application.

   Navigate to **http://<host>:8080/elx/** to view the Elixir Ambience Web Console. Type the domain name (for example, "eno", "foxx", etc) and the appropriate user name and password to sign in.

2. Click **Create** - **Ad-hoc Report** and then click the relevant universe - in this example Cars as shown in Figure 7.1, "Create Ad-hoc Report":

   Figure 7.1. Create Ad-hoc Report
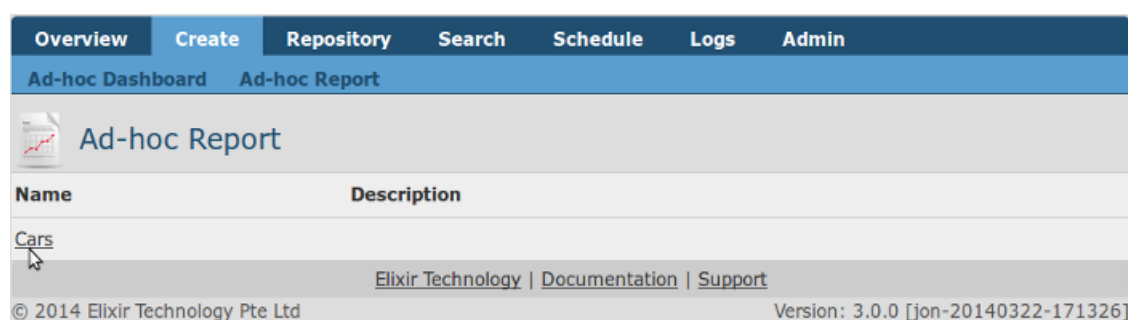
3. Select a location in the repository from the drop-down list, as shown in Figure 7.2, "Select Repository Location". Enter the file name and click **Create**.

Figure 7.2. Select Repository Location

4. The system creates a blank report, and opens it in a new browser tab as shown in Figure 7.3, "System Creates a Blank Report".

**Figure 7.3. System Creates a Blank Report**

5. Click the Information band and enter a title. Select the page number to be on the left, and the date and time to be on the right side of the page, as shown in Figure 7.4, "Setting up the Information Band".
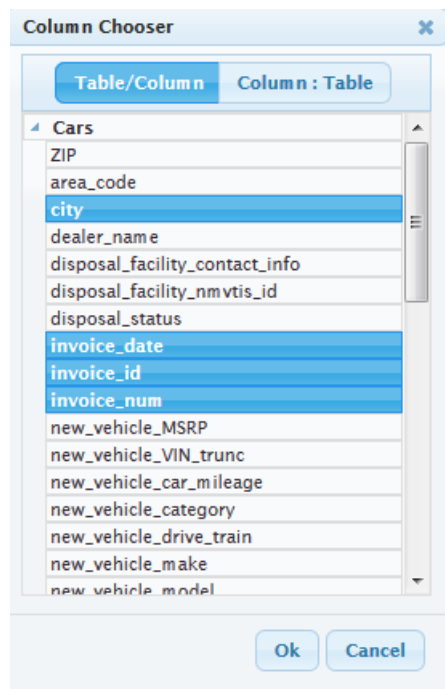
Figure 7.4. Setting up the Information Band

6. Click the Table Band and enter a title as shown in Figure 7.5, "Setting up the Table Title".
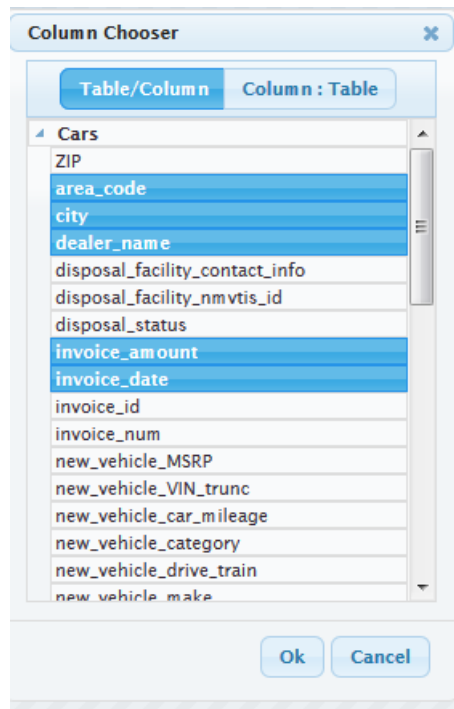
Figure 7.5. Setting up the Table Title
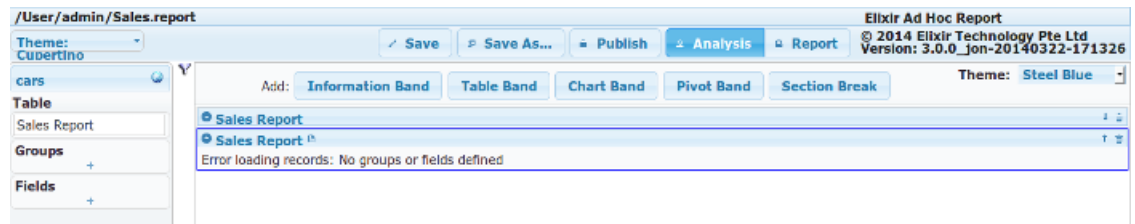
7. Click the Add Column icon (+ sign) under Groups and select the Groups for display, as shown in Figure 7.6, "Setting up Groups".

Figure 7.6. Setting up Groups

8. Click the Add Column icon (+ sign) under Fields and select the Fields for display, as shown in Figure 7.7, "Setting up Fields".

Figure 7.7. Setting up Fields

9.   Click **Report** on the main toolbar to preview your report, as shown in Figure 7.8, "Sample Report".

Figure 7.8. Sample Report