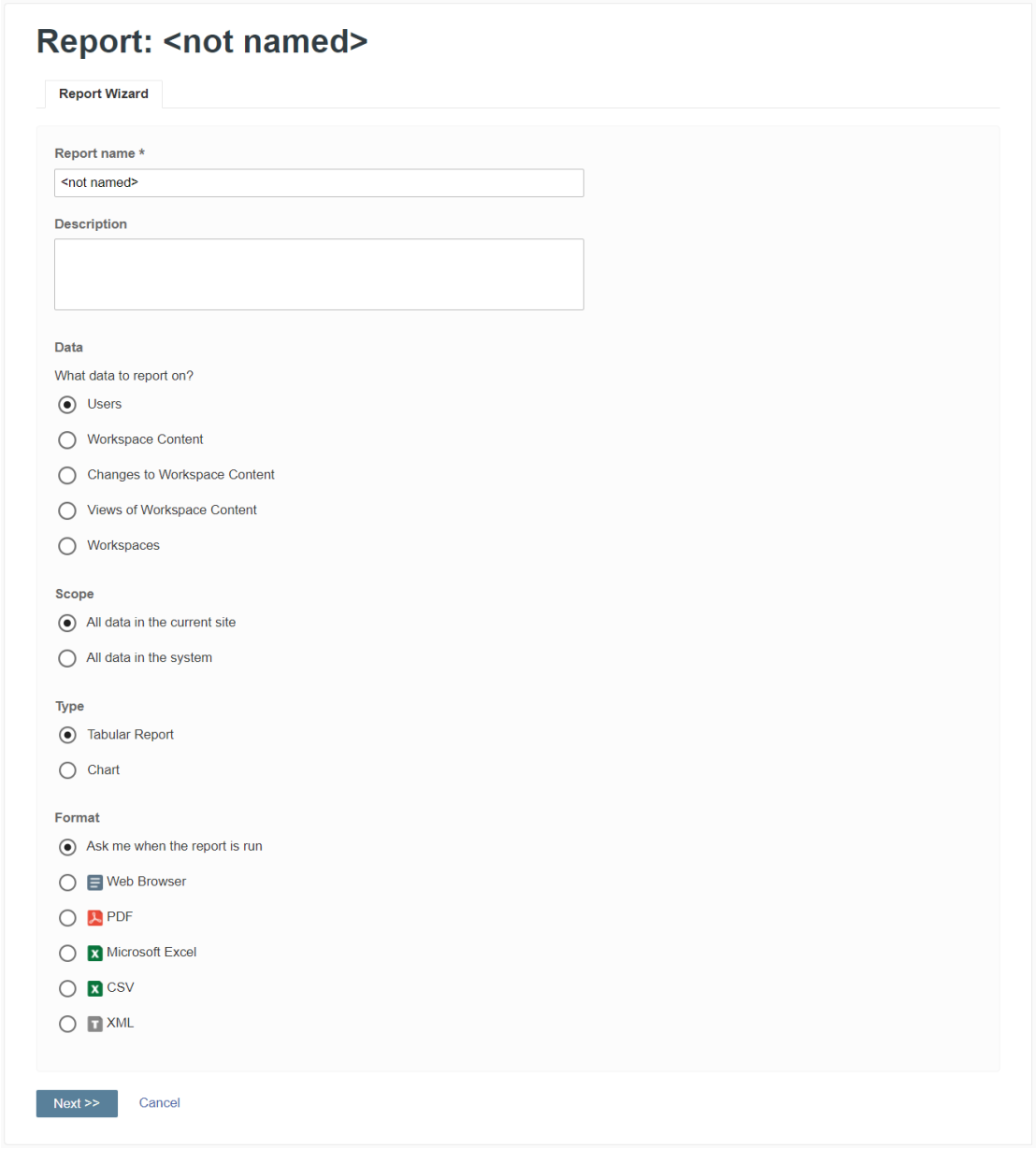
Creating a Report - Full Wizard Breakdown for Site Owners

Chris Holt - 2019-11-25 - Reports

Depending on whether you're a workspace manager or site owner all depends on how you create the initial report, see this KB article for full details

This KB article will help guide you through the report creation wizard breaking it down into each section.

After clicking "Create Report" you'll be presented with the "Report Wizard" as shown below.



Report Name: Name your report to help identify it.

Description: Add more details to help explain to other users what this report refers to.

Data: Full details on all the data types and attributes can be reviewed via this KB article.

Scope: You can run the report against all the data in the current site or all the data in the system.

Type: You can either choose to create a "tabular report or chart" report, see below for full details regarding both types...
Tabular - is the most basic type of report you can build, the output is organised in a multicolumn, multi-row format, with each column corresponding to a column in the DB table.
Chart - shows data from reports in the form of bars, pie, radar, lines or scatter.

Format: There are various formats of which you can generate the report, see below for full details regarding all types...
Web Browser - The results are shown via your web browser in a new window.
PDF - Download prompt appears/choose where to save the file, you'll require a PDF viewer in order to view the results.
Microsoft Excel - Download prompt appears/choose where to save the file, you'll require Microsoft Office or similar application in order to view the results.
CSV - Download prompt appears/choose where to save the file, you'll require Microsoft Office or similar application in order to view the results.
XML - Download prompt appears/choose where to save the file, you'll require Microsoft Office or similar application in order to view the results.

1. Provide your report with a **name** and select the **data type** required, click **next.**

> **Kahootz Tip:** The name field is mandatory and so it'll save as <not named> if you do not change it.

2. You'll now need to add the report data which are called "**attributes**" which defines what data/results the report will pull/show.
Click "**Add an Attribute**" and select from the drop-down menu what details you would like to report on, once done click **Next**.

4. You can **add a filter** if required, this helps to narrow down your results - click **next** when done.

5. You can sort by **data ordering** your results by a specific attribute, select the attribute name from the "sort by 1" drop-down menu.

6. Click **next** and you've now completed your report, click **Run Report** to show the results.

Additional Information
If the "format type" at the start was left as default "Ask me when the report is run" then you choose the type of report you require each time running the report.

If you require changing the report at any time, maybe you wish to add/remove attributes, rename the report or change the type of

type.
You'll notice there are tabs along the top of the report screen once you completed creating your report - shown above - see below for full details.

Summary	Homepage for running the report which also provides brief report information
General	An overview of the report details (Name, Data, Type, Scope & Format)
Attributes	Shows a list of the reports attributes which can also be edited if required
Sort	Choose the order that you want the data to appear in which can also be edited by changing the drop-downs
Filter	Shows any filters you have created to decide which entries are included or not within the report - drag & drop items to rearrange them
PDF	Set your formatting options for when you export to PDF
Options	Customize your display options within the report
Template	The report template is automatically created for you based on the attributes you choose for the report. You can customise the template, to have more control over the report's appearance, but if you add any new attributes to the report, you'll need to add them to the template manually.

Click here to navigate to top of page.

Related Content

- Report Attributes List for each Data Type to Report on (Full List)
- Creating a Report - Full Wizard Breakdown for Workspace Managers
- Creating a Report on Users & Teams
- Creating a Report - Total Workspace Items (Docs, Databases etc.)
- Creating a Report