Custom Reports

Create a Template and Run a Report Using a Saved Template

OVERVIEW

The template builder tool allows you to create a custom template that includes data tables and maps. You can preselect data elements to display in the table and map as desired, and also customize the Microsoft Excel output to add your own colors, fonts, and formatting.

This document will take you through the process of creating a custom template and using the saved template to run a report:

- Create a Custom Report Template
  (Optional: Edit a Table, Edit a Map, & Modify a Template)

- Edit a Template

- Run a Report Using a Saved Template

  Click an above topic to be taken directly to that section.

LOCATE TEMPLATE BUILDER

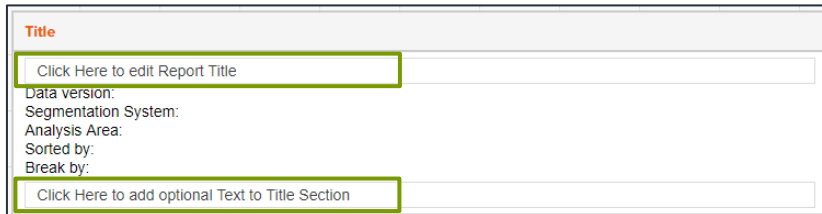1. From the homepage, click on Reports.

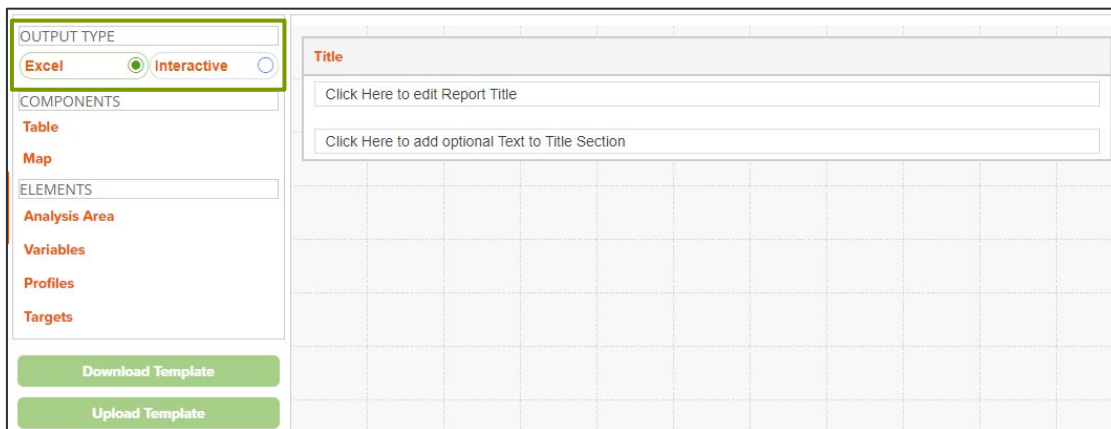2. Select Custom Reports ➡ Create New Template.

identify
deliver
optimize

CREATE A CUSTOM REPORT TEMPLATE

1. In the appropriate box, enter a report title.
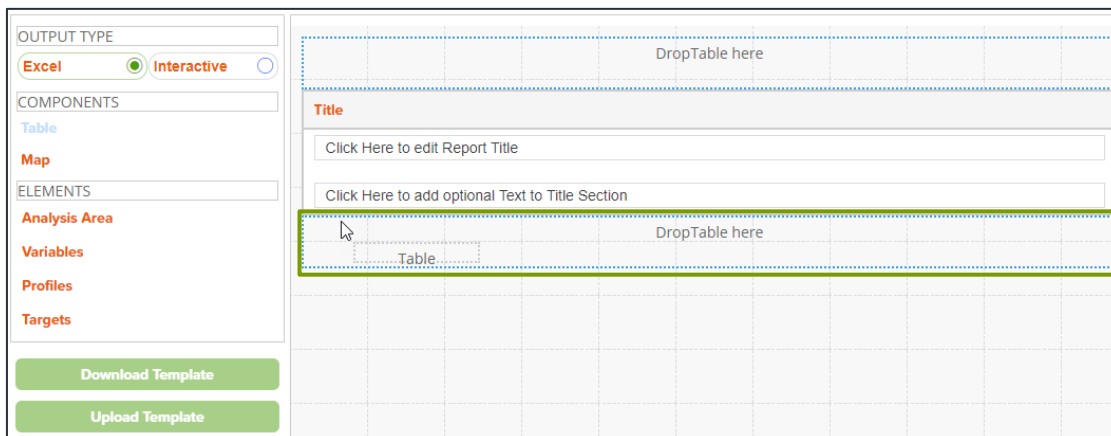   (Optional) A subtitle can also be included in your report.

2. Select an output type, Microsoft Excel or Interactive Output.
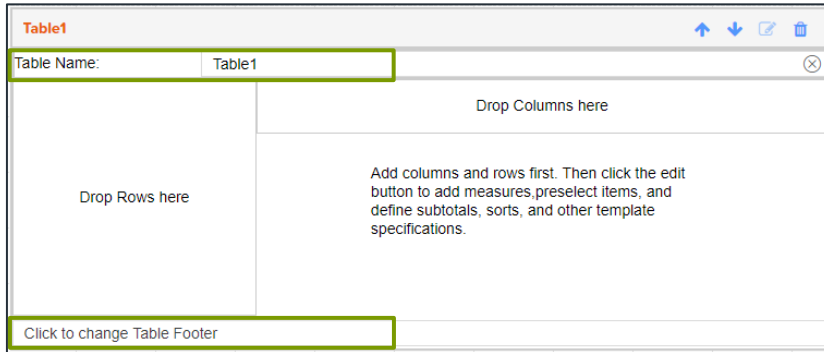   Note: Interactive output is currently available for templates with only one table.

3. To add a Table to the template, do the following:

   a. Drag and drop the Table component into the right pane.

b. Change the table name by typing new text in the Table1 box.
(Optional) A table footer can be added by typing new text in the Click to change Table Footer box.

c. Drag and drop any data element to add to the table as either a row or column.
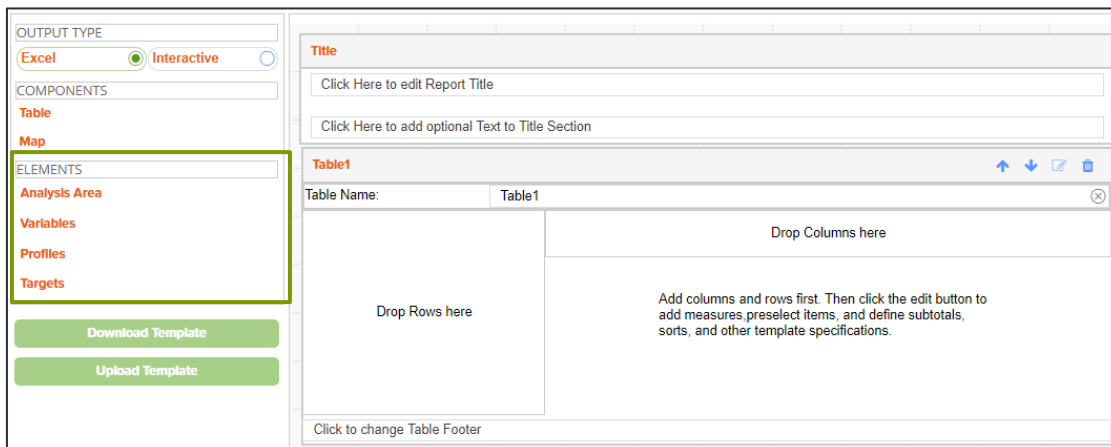
d. Click the edit icon to add pre-selections to your table. See Edit Table.

e. Repeat steps a-d to add additional tables to the template. Up to 10 components (tables and/or maps) can be added to a template.

4. To add a Map to the template, do the following:

a. Drag and drop the Map component into the right pane.

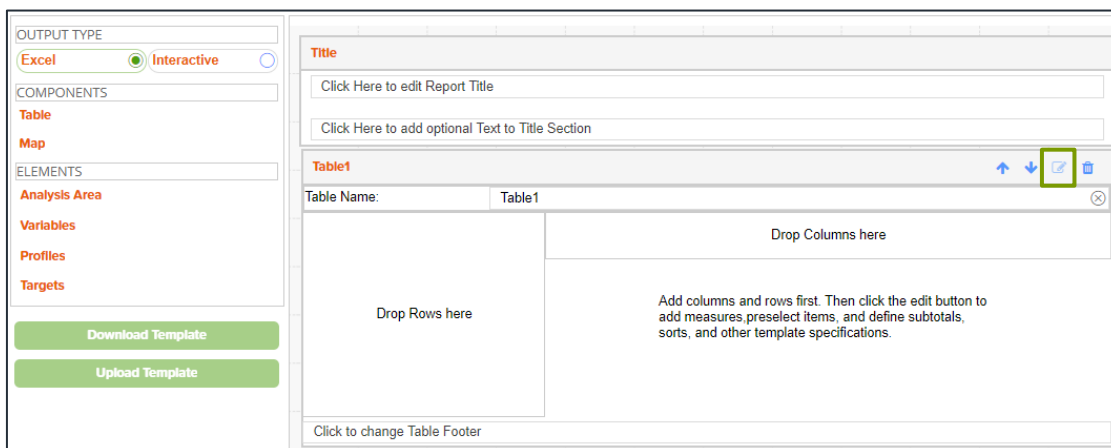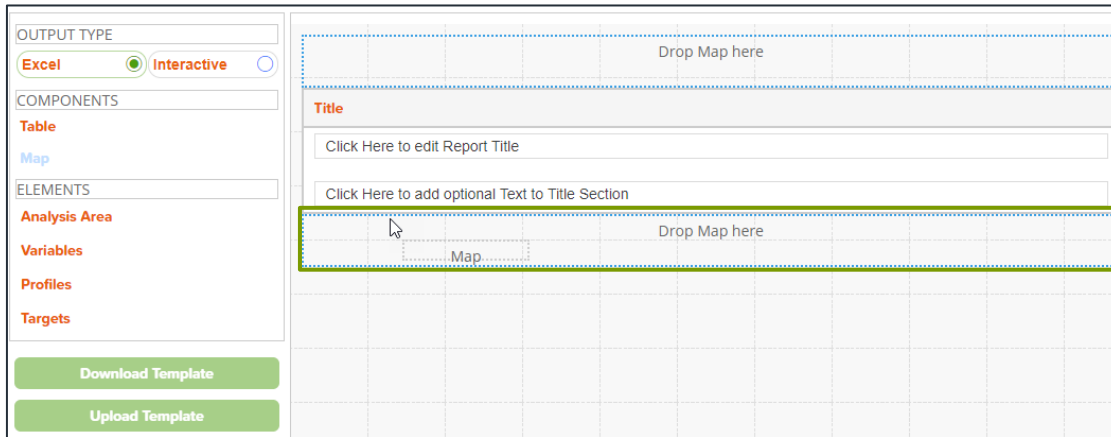b. Change the map name by typing new text in the Map1 box.
(Optional) A map header and/or footer can be added by typing new text in the Click to add/edit map header or Click to add/edit map footer box.
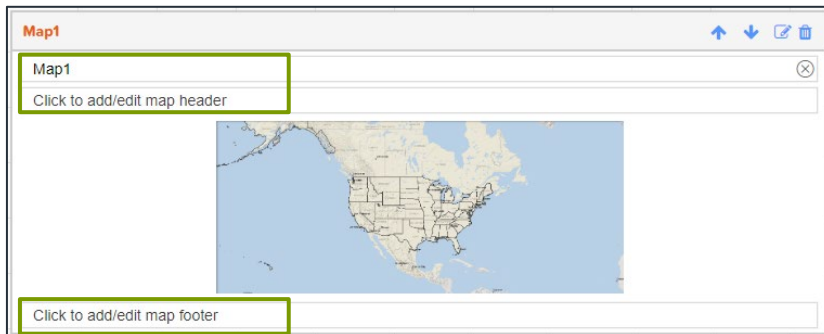

c. Click the edit icon to add pre-selections to your map. See Edit Map.

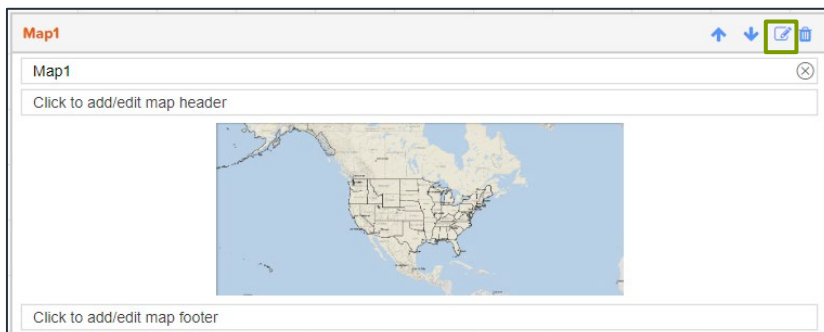d. Repeat steps a-c to add additional maps to the template. Up to 10 components (tables and/or maps) can be added to a template.

5. To modify the template, click Download Template. See Modify Template.
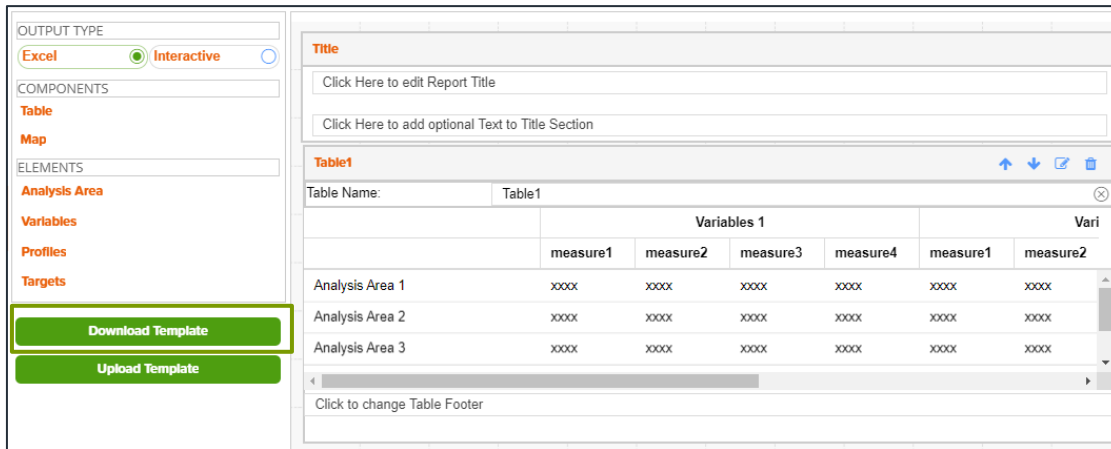
6. After verifying your selections, click Save.

EDIT A TABLE

Note: Any pre-selections made here will remain fixed on the report, and not able to be changed when you run a report using the saved template.
If you want the option to set the Analysis Areas, Profiles, Targets, Variables, etc. at run time, do not make any pre-selections on the corresponding tab.

To ensure system performance, report limitations have been implemented for tables included in custom reports. The limits can be viewed here.

1. Once a table has been added to your template, click the edit icon.
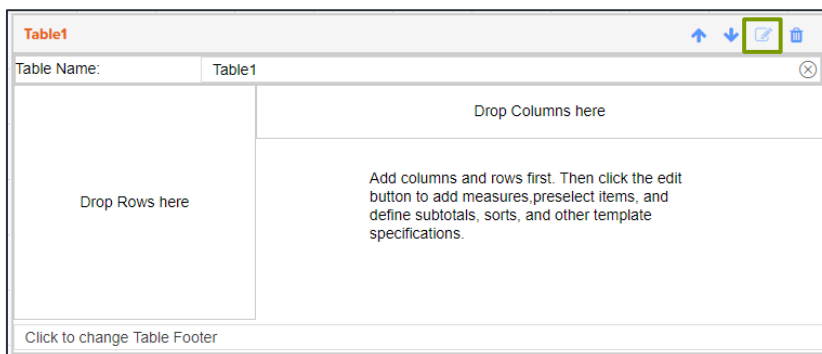
2. Table Tab - Edit the general details of the table:
   - Update the table name and table footer.
   - Specify the elements to be used as the table rows and columns.
   - Transpose the elements being used for the rows and columns.
   - (Optional) If Profiles or Targets are one of the selected table elements, you will be prompted to select a segmentation system.

3. Analysis Area Tab - Select the analysis areas you'd like included in the table:
   - (Optional) If you want to specify the maximum number of analysis areas to choose at report runtime, click to change the prompt to ON.
   Then, enter the maximum number of analysis areas for the table.

   - Navigate to and select the geographies or analysis areas to include in your table. Selected areas will appear in the selection pane on the right side of the screen.
   - Below Select a level of detail, click the option that best describes how you want to arrange your selected geographies or analysis areas in your table. The options are:
     - As Selected - Reports data for each analysis area (aggregate or component) in the selected order.
     - Component - Reports data for all the analysis area components you select (State, County, ZIP Code, etc.). If you select this option, you need to select a geography level to use as component and the method by which you want to include the geographies.
   - To append parent geographies to the table output, click the OFF button next to Include Parent Geographies to set it to ON. When the Parent Geography pop-up window appears, click the Name and/or Code check box next to the parent geography(ies) that you want appended.

Note: If the selected output type is interactive, and you select to include parent geographies during the template creation process, the Parent Geography feature in the interactive report output will not be available.
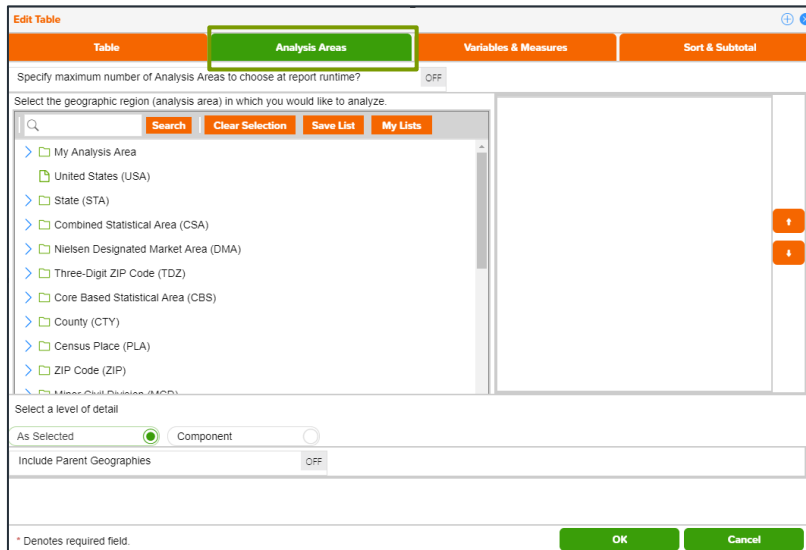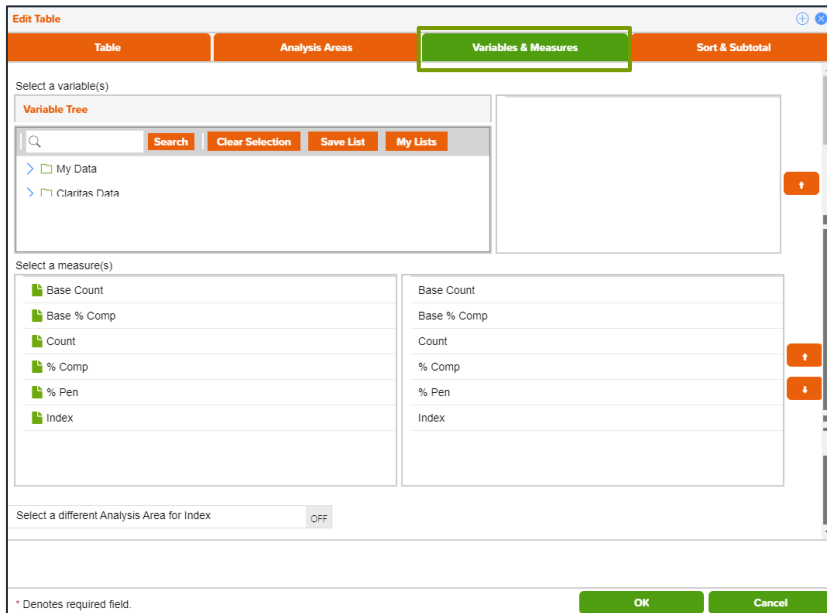

4. Select the variables and variable measures you'd like included in the table on the Variables & Measures Tab:

    Note: this tab will only be available if you have selected Variables as one of your table elements.

    - Navigate to and select the variable(s) that you'd like to include in your table.
      Selected variables will appear in the selection pane on the right side of the screen.

    - Select the variable measures that you'd like to include in your table.
      The default is set to include all measures.

    - (Optional) If you are creating an Analysis Area by Variables or Variables by Analysis Area table, specify how you would like the index calculated:
      - If you leave the Select a different Analysis Area for Index as OFF, the selected analysis areas will be the base for the index calculation.
      - If you set the Select a different Analysis Area for Index to ON, you will then be prompted to select the geography that you would like used for the index calculation.

Note: Setting this option to ON will allow you the ability to select a consistent geography for calculating index, regardless of the number of analysis areas selected.


5. Select the profile and profile measures you'd like included in the table on the Profiles & Measures Tab:

   Note: this tab will only be available if you have selected Profiles as one of your table elements.

   - Set the Use Consumption Profiles & Measures prompt from OFF to ON if you would like to use a consumption profile and view the consumption data as part of your table.

   - Navigate to and select the profile(s) that you'd like to include in your table.
     Selected profiles will appear in the selection pane on the right side of the screen.

   - Select the profile measures that you'd like to include in your table.
     The default is set to include all measures

   - (Optional) If you are creating an Analysis Area by Profiles table, specify how you would like the market potential index calculated:
     o If you leave the Analysis Area Index as OFF, the index will be calculated based on the total U.S.
     o If you set the Analysis Area Index to ON, the index will be calculated based on the extent of the selected analysis area(s).

   - (Optional) If you are creating a Profiles by Targets table, specify if you would like the data projected to an analysis area:
     o If you leave the Analysis Area Projection as OFF, the counts in the report will be left at the total profile level.

o   If you set the Analysis Area Projection to ON, the counts in the report will be projected to an analysis area that you will be prompted to select.
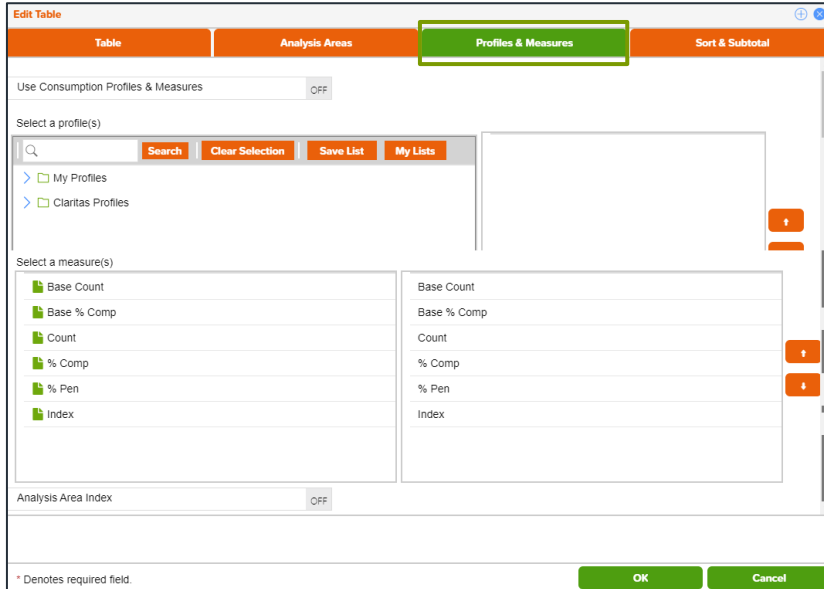
6. Select the targets you'd like included on the Targets Tab:
    This tab will be available if you have selected Targets as one of your table elements.

    ● Select the target group the desired targets belong to.
      The selected target group will appear in the selection pane on the right side of the screen.

    ● Navigate to and select the target(s) that you'd like to include in your table.
      Selected targets will appear in the selection pane on the right side of the screen.

- Below Select a level of detail, click the option that best describes how you want the target information displayed in your table. The options are:
    - Target - Displays each selected target as an individual set of columns in the report.
    - Segment - Displays only the target's segments in separate columns.
    - Target & Segment - Displays columns for each target and for each segment in the selected target.
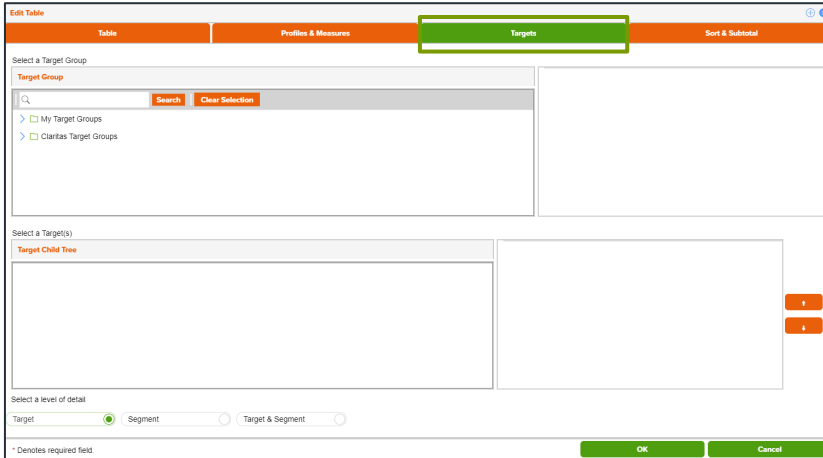
7. Set the sort and subtotal options on the Sort & Subtotal Tab:
    - Select a Sort Method. The options are:

SORT METHODS	
SORT METHOD	DEFINITION
None	No sort applied.
Row ID	Sorts data according to row ID.
Row Name	Sorts data according to name in alphabetical order.
Report Selection	Sorts data based on a specific variable and measure.
First Target/Segment	Sorts data based on your target or segment selections.

(Optional) If you select Row ID or Row Name as the sort method, you need to specify a Sort Direction.

(Optional) If you select Report Selection as the sort method, you need to specify a Sort Direction, Sort Variable, and Sort Method. You will also need to select a Subtotal Method. The options are:

REPORT SELECTION SUBTOTAL METHODS	
SUBTOTAL METHOD	**DEFINITION**
None	No subtotal applied.
N-Tile	Distributes the total number of records in an area into equal groups that are approximately equal, such as fourths or fifths.
	If you select this option, you will also need to specify the Number of Ranges, Subtotal Measure, and Color Scheme.
Equal Ranges	Groups areas (rows) based on the values of a specific variable – Each subtotal group will have an equal minimum/maximum range for the specified variable.
	If you select this option, you will also need to specify the Number of Ranges and Color Scheme.
Equal Records	Uses basic division to group the number of records (rows) equally – Each subtotal group will have an equal number of records.
	If you select this option, you will also need to specify the Number of Ranges and Color Scheme.
Analysis Areas	Groups the records by the selected analysis areas.
	If you select this option, you will also need to specify how to display and calculate data for any duplicate geographies.
Manual	Groups the areas (rows) based on the values of a specific variable – The minimum/maximum values for each subtotal group is set by the user.
	If you select this option, you will also need to specify the Number of Ranges, Color Scheme, and the minimum/maximum values for each subtotal.

(Optional) If you select First Target/Segment as the sort method, you need to specify a Sort Direction and Sort Measure. You will also need to select a Subtotal Method. The options are:

FIRST TARGET/SEGMENT SUBTOTAL METHODS	
SUBTOTAL METHOD	**DEFINITION**
Tops & Bottoms	Displays a specified number of top and bottom entries. If you select this option, you will also need to select the number of top/bottom records to display.
Tops	Displays a specified number of top entries. If you select this option, you will also need to select the number of top records to display.
Bottoms	Displays a specified number of bottom entries. If you select this option, you will also need to select the number of bottom records to display.

8. After verifying your selections, click OK.

EDIT A MAP

1. After adding a map to your template, click the edit icon.

2. Map Tab - Edit the general details of the map:
   - Update the map name, map header, and map footer.
   - Link the map to an existing table.


MODIFY A TEMPLATE

1. On the Custom Template Builder screen, click Download Template.

2. When the Microsoft Excel template downloads, open the template, and make any necessary changes. Updates that can be made include:
   - Modifying the font or color of the row headers
   - Inserting a company logo
   - Customizing the layout of the data by adding Excel formulas or additional worksheets with cell references

3. Save the template to your computer.

4. On the Custom Template Builder screen, click Upload Template.
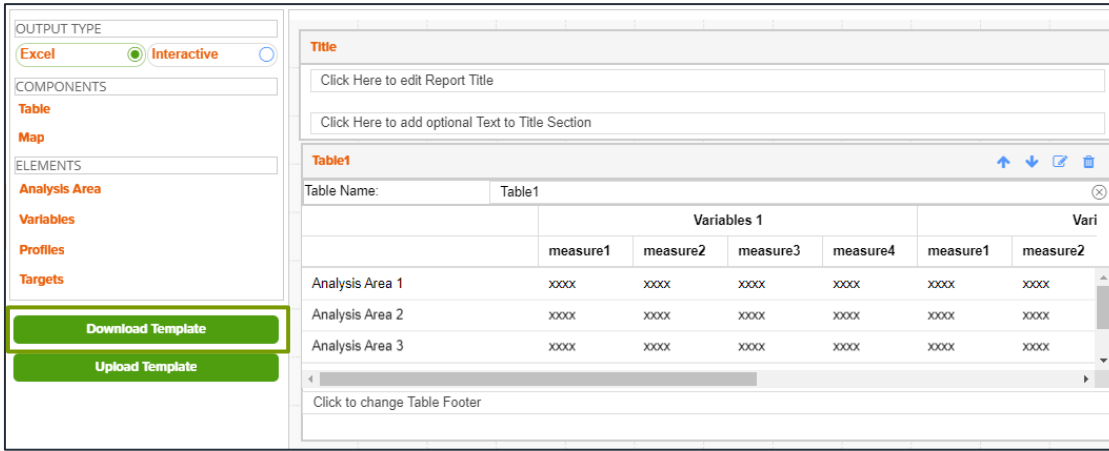
5. Navigate to and select the template.

6. Click Save.

Note: If you make any additional edits to the template once it has been modified, the modified changes will be available in backup tabs in the report template. If you would like your template to retain those modifications, you will need to download the template, reference the backup tabs, and make those modifications again. Once those changes have been made, you can delete the backup tabs.
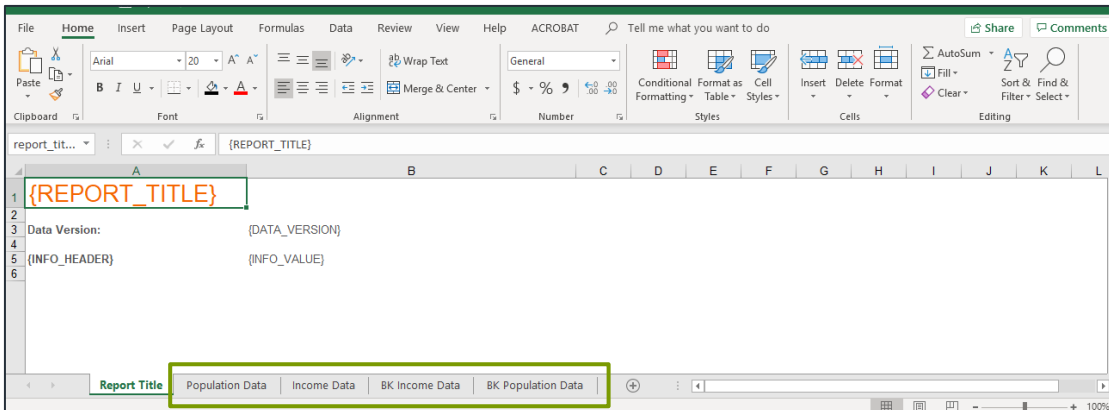
EDIT TEMPLATE

1. From the homepage, click on My Content.

2. Select Report Templates and locate the template you need to update.
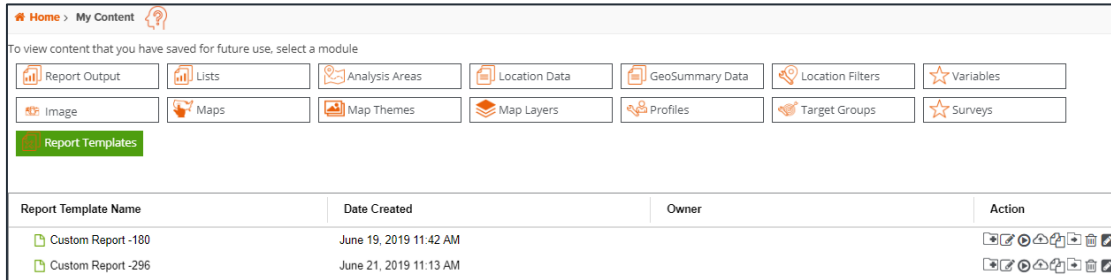
3. Click the edit template icon.

4. When the template loads on the Custom Template Builder screen, make any necessary changes.

5. After verifying your updates, click Save.

RUN A REPORT USING A SAVED TEMPLATE

There are two main approaches for how to create a custom report:

•   After clicking Save on the Custom Template Builder screen, a pop-up box will appear giving you several options. To create a report using your saved template, click Run a report using the template.
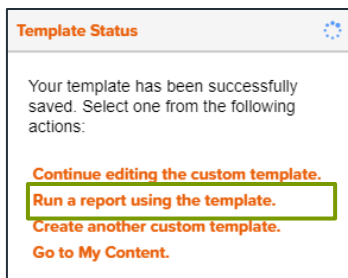
- Otherwise, go to Reports > Custom Reports and click the Run Report Using Existing Template tile. Then, select the desired previously saved template.
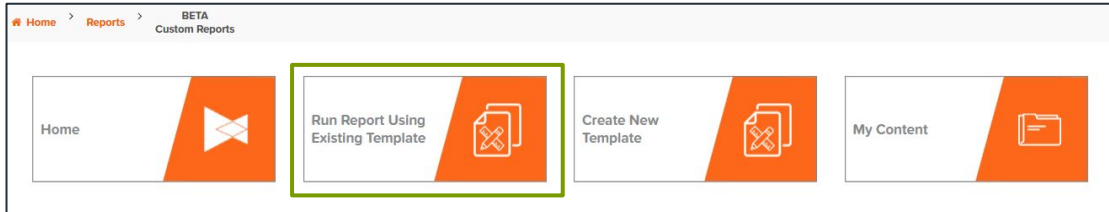
When the report prompts load, make the necessary selections, enter a report name, and click Submit.

Additional Considerations:

- At report run time, if you would like the profile and/or analysis area selections that you make to be carried over to all of your report sections change the Apply these selections to all sections prompt from OFF to ON.

- To ensure system performance, report limitations have been implemented for tables included in custom reports. The limits can be viewed here.