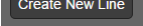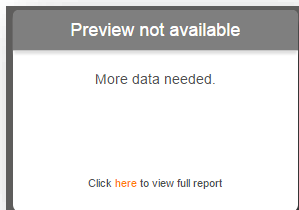# Creating a new line

(Temporary Instructions)

Once logged in, click on the [icon] lines button, or the Lines Option to go to the Line creation page.

To make a new line, click on the Create New Line located at the top right of the page and you should be directed to the New Line Preview Screen.

The New Line Preview Screen is where you begin making your reports.

You should be able to see the Preview Screen once you begin creating the line.

A preview of the line can only be seen once you have selected an x-axis, a y-axis, and at least one display field.

To start, click on the [icon] with the dialog box saying open here. This is the properties panel.

Under Properties tab, you will be provided a system generated Line Name. This is fully customizable and can be changed on the Line Name Field.

For now, what we can use is the tbl_sls_by_wk_2_Rimports Source Data Chunk.

The Active check box is an option to disable/enable the report. This feature has not been implemented yet.
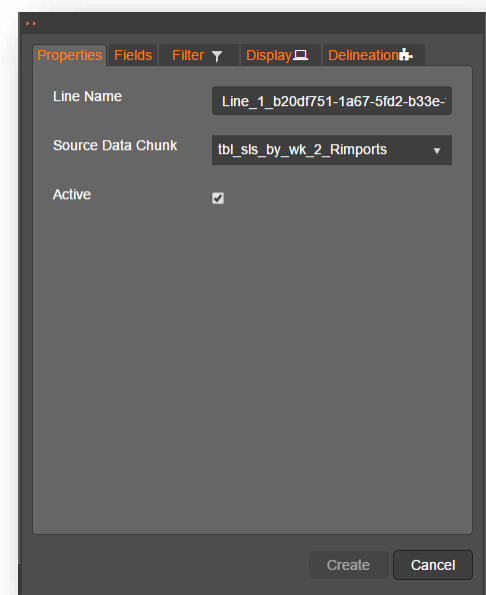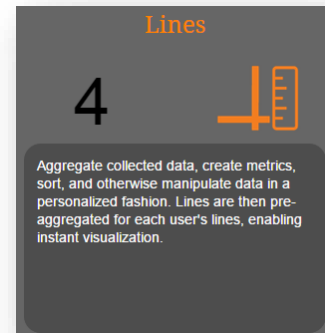
The Fields tab is where you decide what fields to include in your Line.

For each field, there are three buttons on each field:

- Filter ( )
- Display ( )
- Delineation ( )

The Filter is where you define filter for the fields you want to display: if it's equal to a value, more than a value, less than a value, etc.

The Display is where you customize the Name of the Display Field, if you need to display an aggregate or to simply format the value if it's an integer or currency.

The Delineation is where you determine if a field goes to X or Y axis.

NOTE: For now, the Date Comparison Settings can only be used for the WM Week field.

In concept, you can create a fully customizable report with your selected fields and axes.
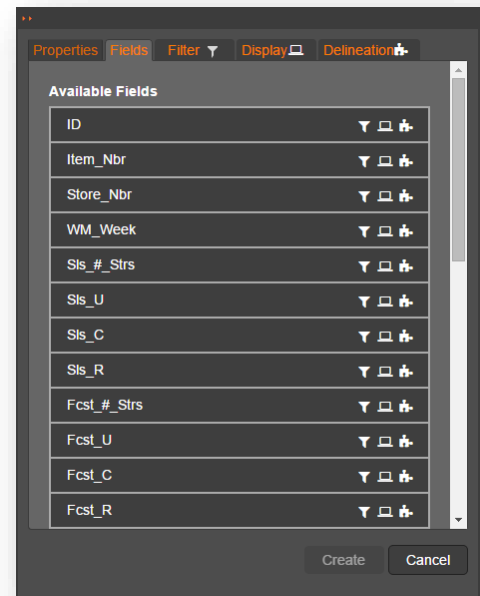
Application

To make a Year over Year report, first select on the Properties Panel Store Nbr, set tbl_sls_by_wk_2_Rimports as your Source Data Chunk and set it as your Y-axis under Delineation.

Make sure the check box for Year over Year is unchecked and click apply.

> *NOTE: The check box for Total is still not functional at this time. So it will show you a total regardless.*

Now select, WM_Week and under Filter tab, set it to be greater than 201401 (YYYYWW format).

> *NOTE: We recommend setting the filter to a closer date for faster processing.*
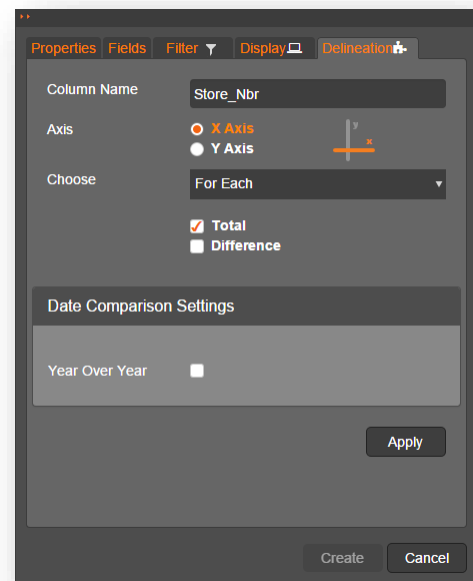
Go to Delineation, make WM_Week your X-axis.

Now put a check mark on the check box for Year over year and additional options should appear.

Under Data Chunk Date Mapping, select tmp_sls_by_wk_wks. This is the table we use to compare the dates.

Set Main Date field as WMartDt_Yr_ and set the Last Year Date Field as WMartDt_Yr_LY_ then click Apply.

NOTE: Once you click Apply on an item it should put you back under the Fields tab with an orange indicator on the icon at the right

Date Comparison Settings	
Year Over Year	☑
Data Chunk Date Mapping	tmp_sls_by_wk_wks
Main Date Field	WMartDt_Yr_
Last Year Date Field	WMartDt_Yr_LY_
	Apply

Now you can add the data fields.

All fields from Sls_U going down to OH_R can be added, except the ones with a Hash (#) in their name.

NOTE: The development team is still working on a fix to be able to include the said fields.

Once you start adding a field, through the tabs to determine any filters, display tab – if you want to set it as a sum, count, etc and format it as currency or integer and finally set it to Y-axis.

NOTE: At this time, we can only set one X-axis, which is mostly used for the WM_Week data field.

Once done with the first data field, it should already show you a preview of the report.

You can add more data fields and once done, click Create and your report should be processed and then displayed.

ID
Item_Nbr
Store_Nbr
WM_Week
Sls_#_Strs
Sls_U
Sls_C
Sls_R
Fcst_#_Strs
Fcst_U
Fcst_C
Fcst_R
MD_U
MD_S
G_Ship_U
G_Ship_C
G_Ship_R
N_Ship_U
Replen_#_Strs
In_Stk_#_Strs
AInv_#_Strs
OH_U
OH_C
OH_R