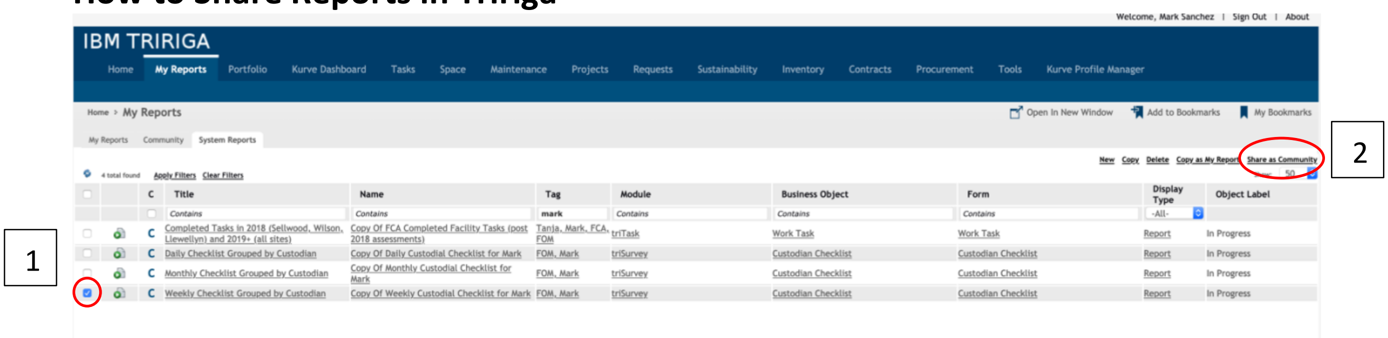
Starting a Report with Kurve

Objectives

- How to share reports in Tririga
- Accessing those reports in Kurve
- Creating a Report in Kurve
- Creating a Graph in Kurve
- Sharing Kurve Reports/Graphs in Tririga Portals

How to Share Reports in Tririga

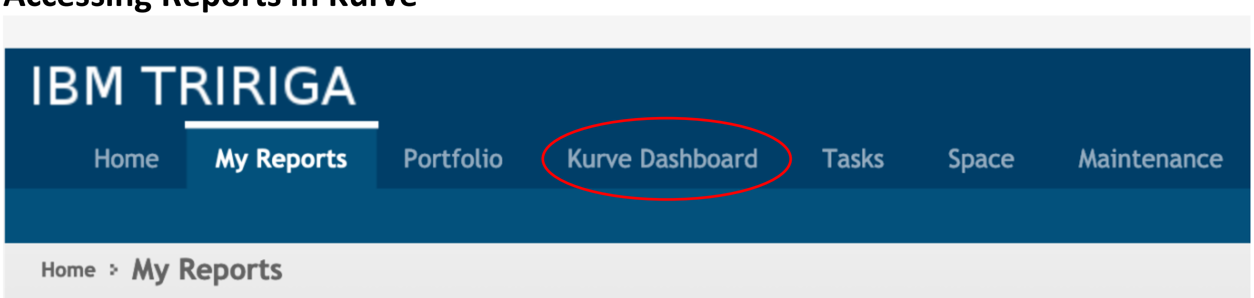


If you have reports you regularly access or use in Tririga and want to use them in Kurve you need to do a couple steps.

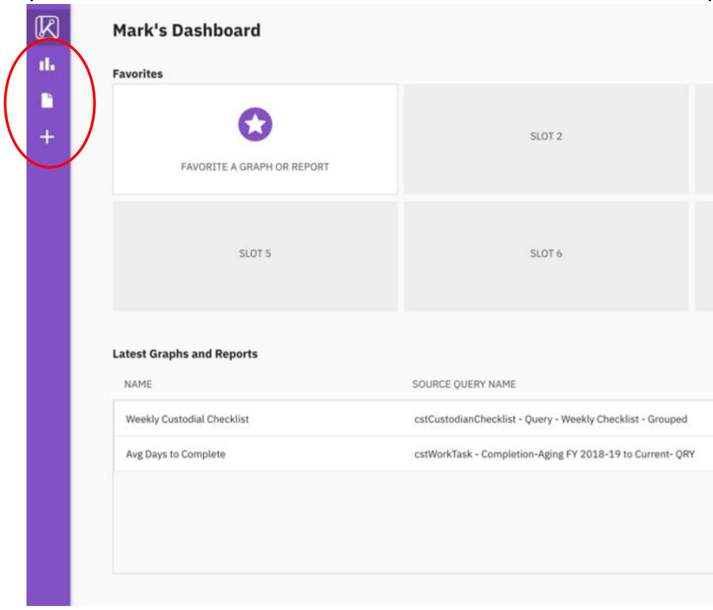
1. Check the box on the far left to select that report.
2. In the upper right area you will see “Share as Community”. If your report is selected, click on that link.

This will allow for a report to be used in Kurve. This step is necessary!

Accessing Reports in Kurve



Now, select the Kurve Dashboard tab along the top row and sign in to access Kurve. You will now see your Dashboard with Favorites and the shared Latest Graphs and Reports below.

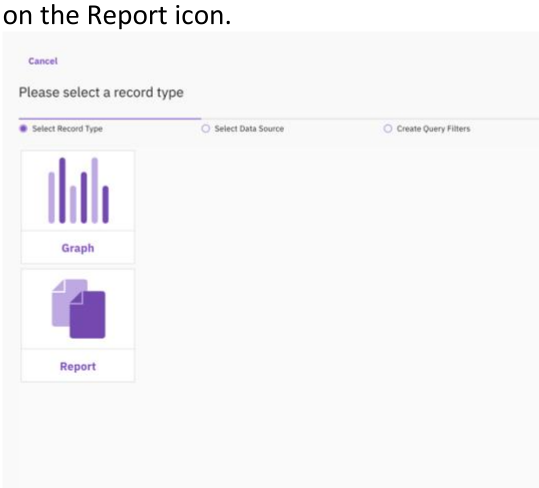


Now, depending on whether you want to create a Chart or a Report you can select one of the options in the toolbar to the left. If you click the bar graph icon, it will show you all charts you have created in Kurve. If you select the sheet of paper icon, it will show you all of the reports you have created in Kurve. Let's select the plus sign icon to create a new report:

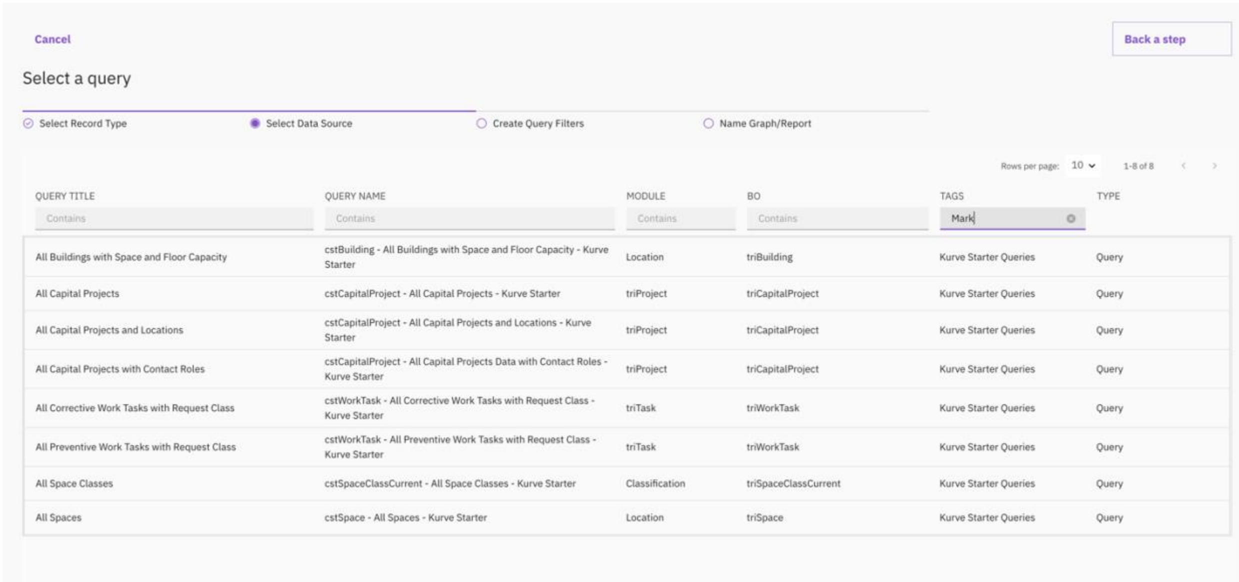
Creating a Report in Kurve

Now that your reports should be available in Kurve go ahead and select the report you'd like to manipulate in Kurve. For this example, I'll be selecting the Weekly Custodial Checklist by clicking on that name.

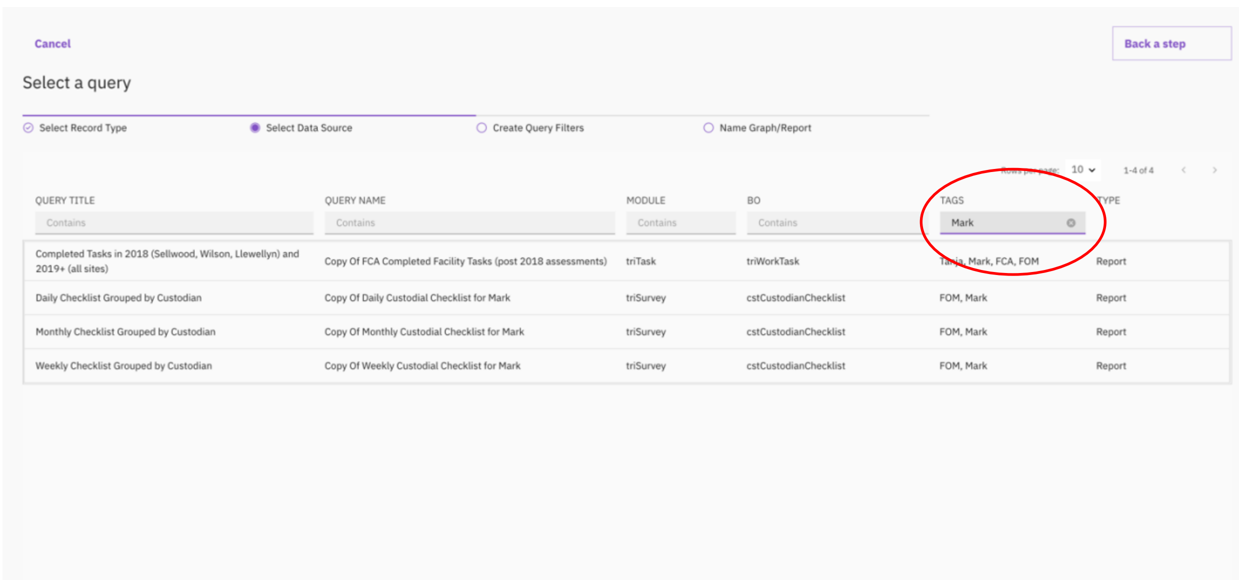
You will now go through the possible selections. For this example, we will be creating a Report so click on the Report icon.



Now, we need to select the Tririga report we want to use as our data source for this Report. I usually tag my reports in Tririga so they're easier to find. So, I go over to the Tags section and enter a tag I often use: my name.

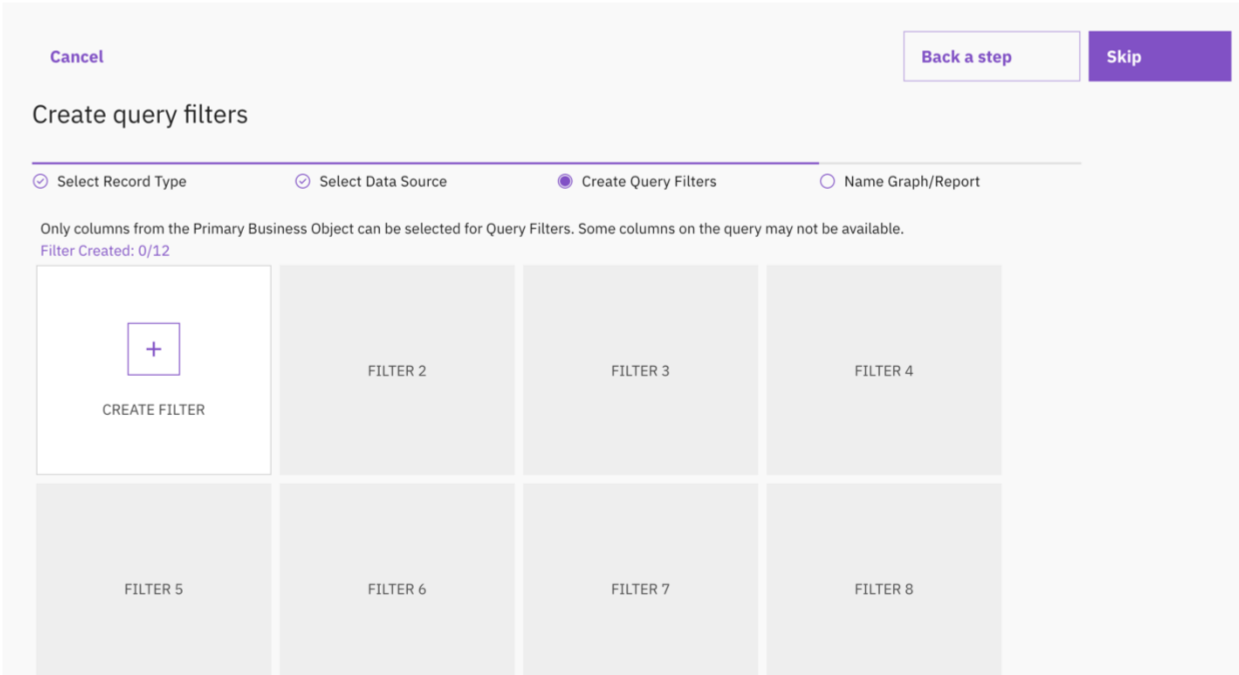


Click Enter on your keyboard and reports with those tags will appear.

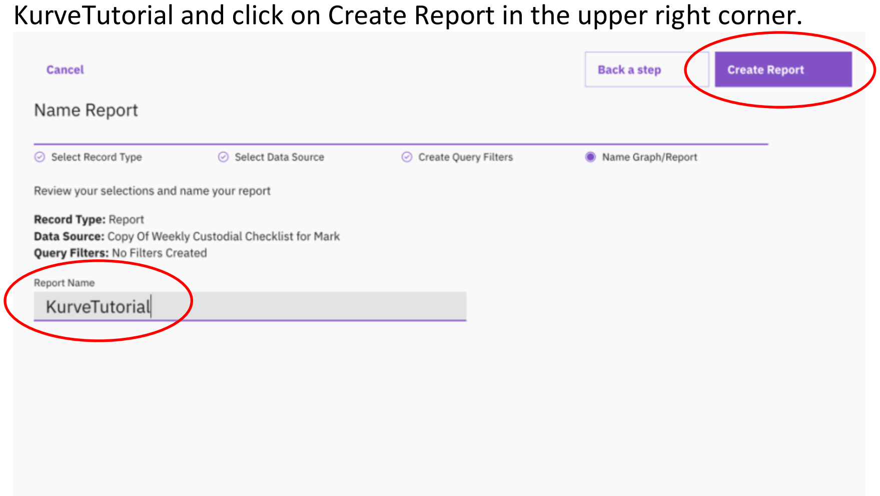


Now, select the Tririga report you want to use as your data source. In this case, I'll select the Weekly Checklist Grouped by Custodian.

Now, you should see the Create query filters screen. It's up to you if you want to set filters for your report here or you can do it on the actual report as needed. In this case I'll just do the filters as needed. Click Skip or Continue (depending on if you have filters on) in the upper right and continue.



Now, we will give our Kurve Report a name and finalize the Report. In this case, I will name my Report KurveTutorial and click on Create Report in the upper right corner.



You should now see your Kurve Report. If this is sufficient, you are done and have your report.

~~~~~~~~~~~~Advanced Features~~~~~~~~~~~~

I want to do a little more filtering and aggregation so that it fulfills my needs. I want to know how many times a month each user has submitted reports.
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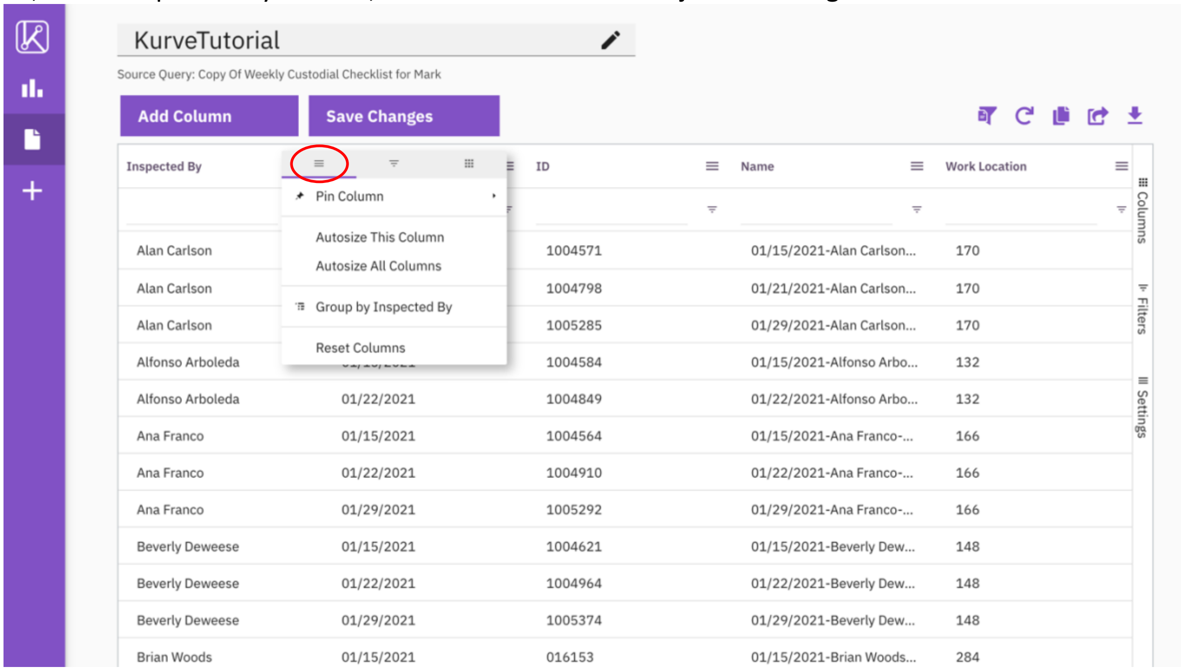
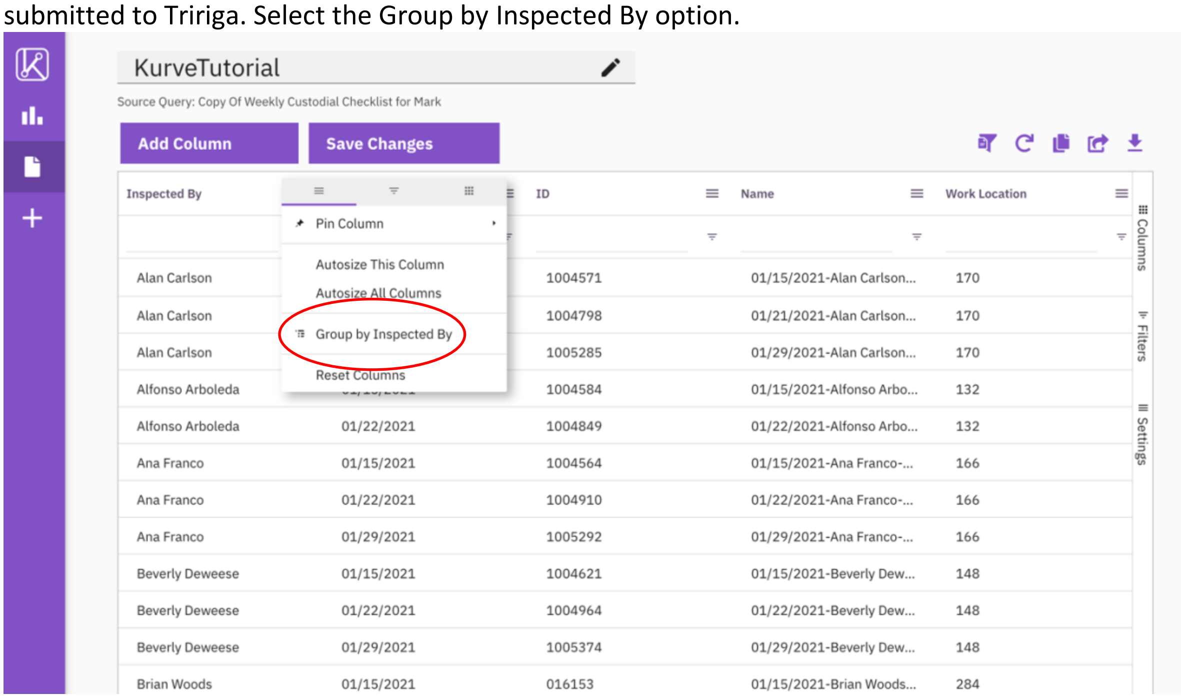
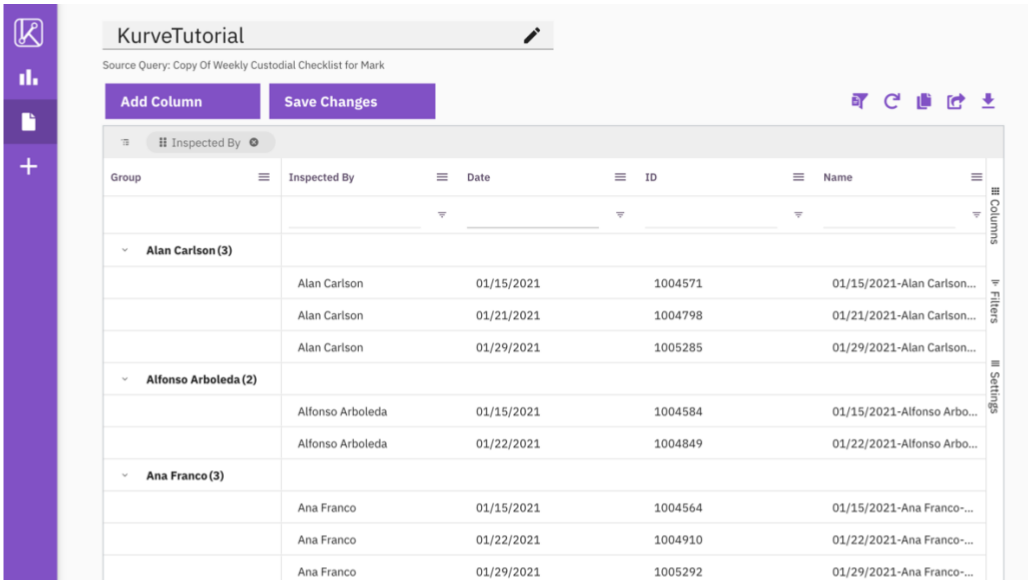
So, in the Inspected By column, select the three bar icon just to the right of the name of the column.



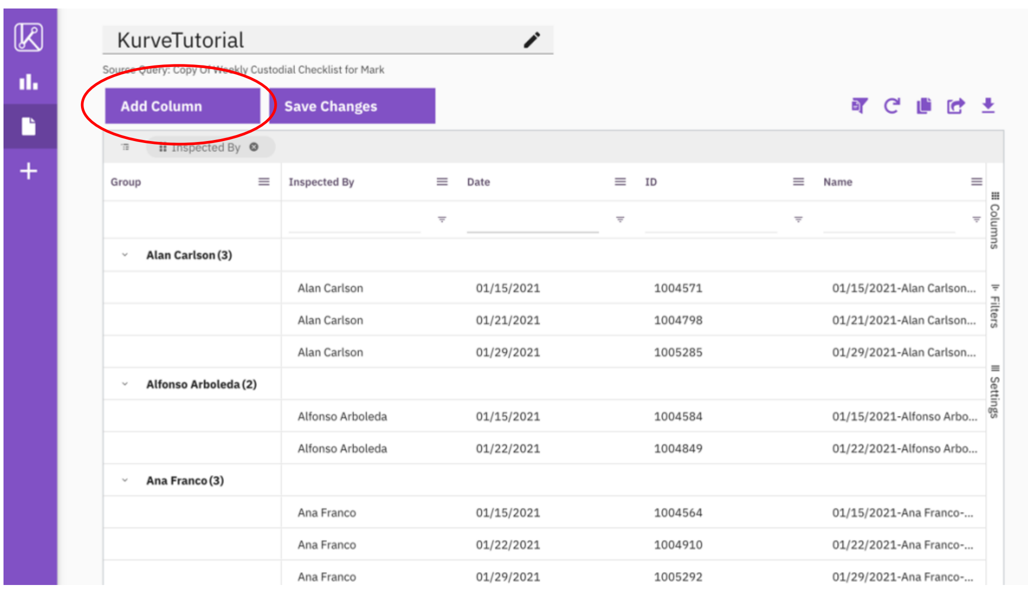
This will allow me to group the custodians by their name so we can count how many reports they've submitted to Tririga. Select the Group by Inspected By option.



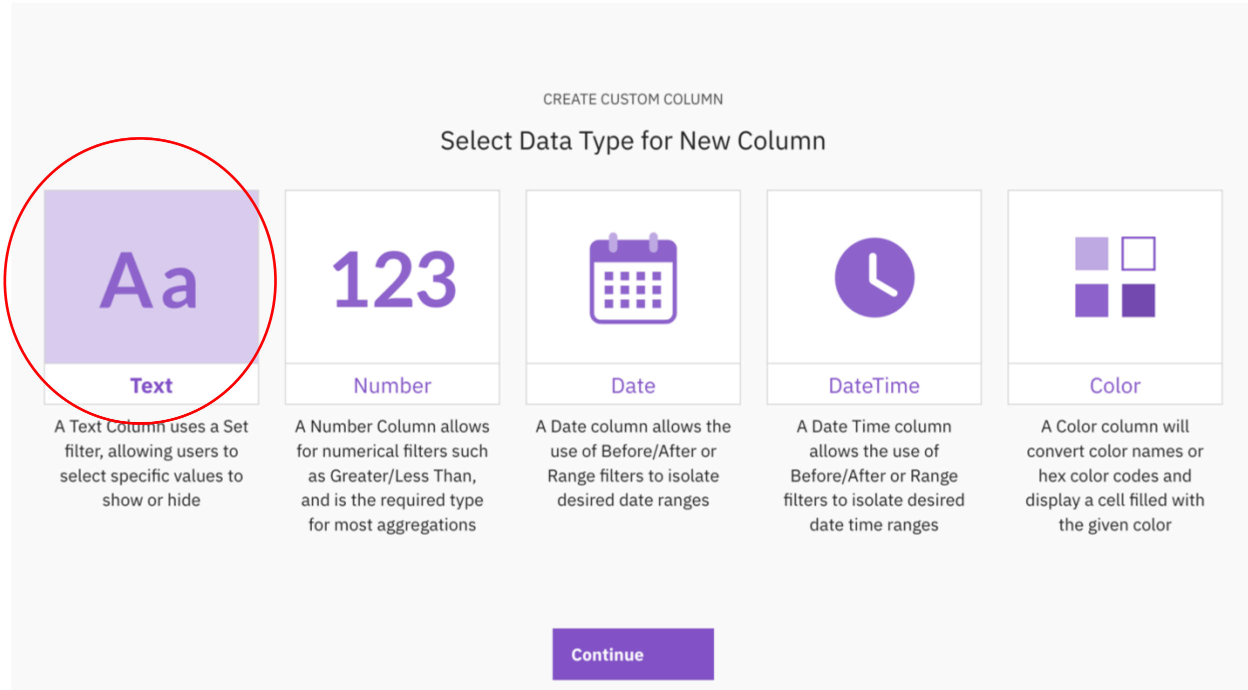
You should now see each individual grouped by their reports submitted. It also shows the number of reports they have submitted for the entire dataset. I want to know how many reports they have submitted each month.



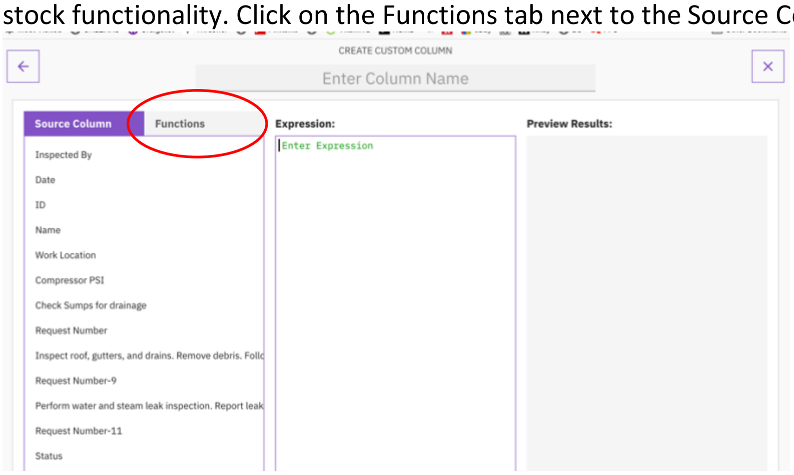
To have this ability, I will need to add a column. To do this, select the Add Column tab just below the name of your report.



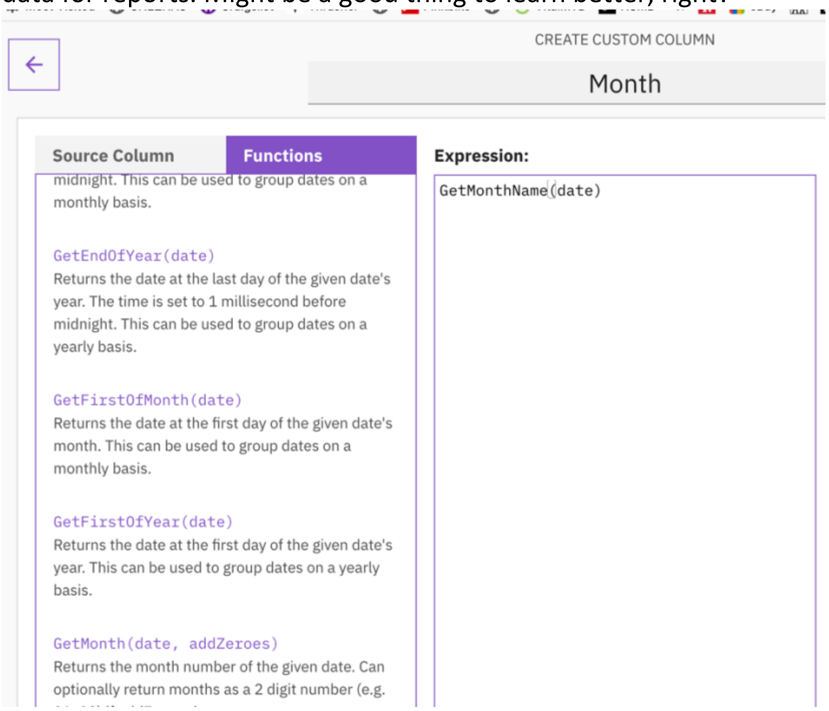
Now, you will see your options you have to add a column of data in your report. In this case, I'm wanting it to add the name of a month, so I will select Text on the left and then click the Continue tab at the bottom.



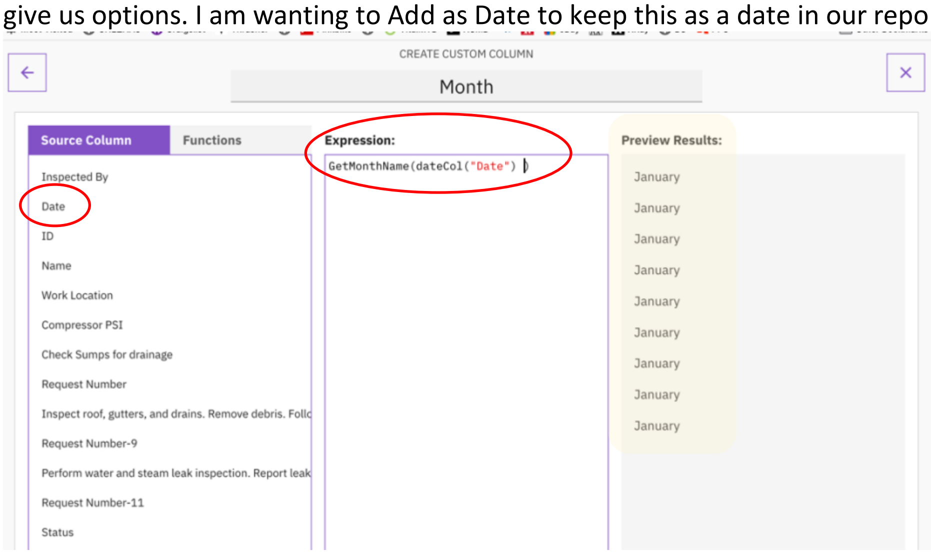
You're now going to create a custom column, so name it. Then, we have Source Columns if we want to choose those as our data sources as well as the option of using Functions to help us process our data sources in different ways (similar to an Excel function). Kurve uses JavaScript for its programming language. So, if you know JavaScript, you're ready to expand. If not, you're like me and have to use their stock functionality. Click on the Functions tab next to the Source Column tab.



For this, I want to use the GetMonthName function, so scroll down and select that one and you'll now see a function expressed in the Expression section. Functions are a powerful way of manipulating the data for reports. Might be a good thing to learn better, right?

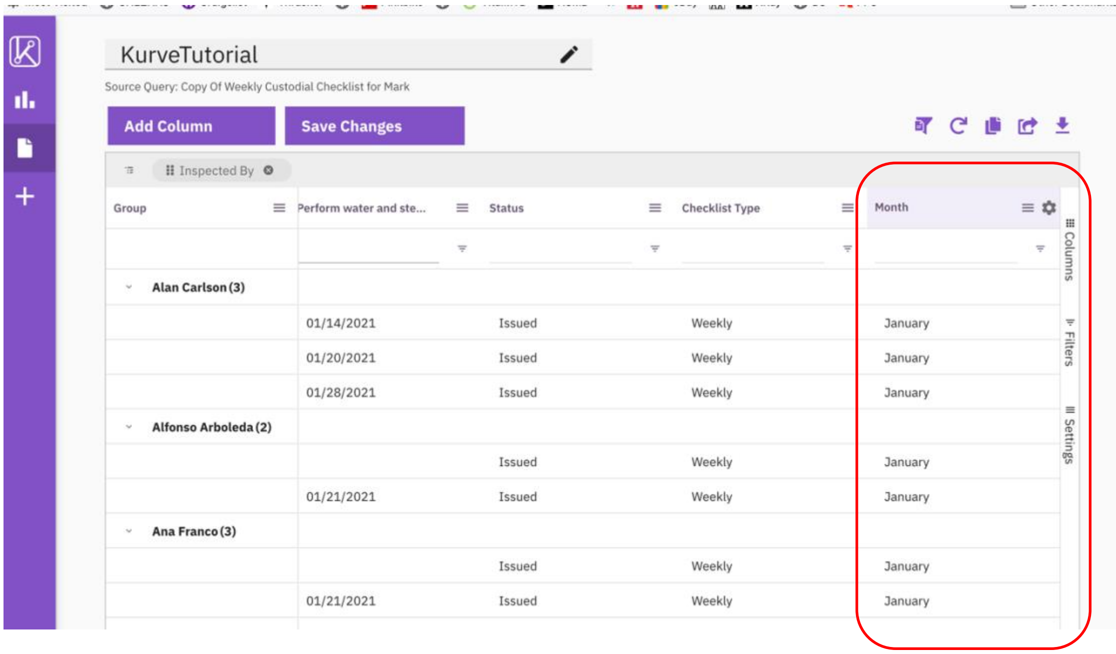


Different functions have different requirements. This function simply wants to know where the date field is so we will go and click back to the Source Column tab and select the word "date" in the Function where it says GetMonthName(date). Then, I can double click on the Date column in the Source Column area and it will replace the word "date" with the direction to our dates in the data. A popup is going to give us options. I am wanting to Add as Date to keep this as a date in our report.



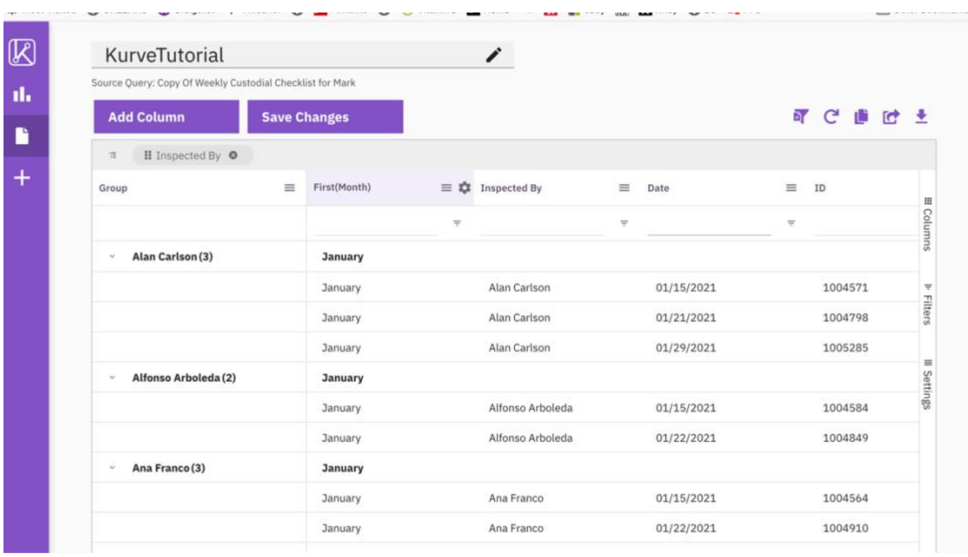
Now, this is an important step because it gives us a preview of how our function is working. In this case it's giving me the month name that I require so all is good here. Click on Create Column at the bottom of the page and it should make a new column for you in your report.

Now you should see this column "Month" if you scroll all the way to the right of the Report.

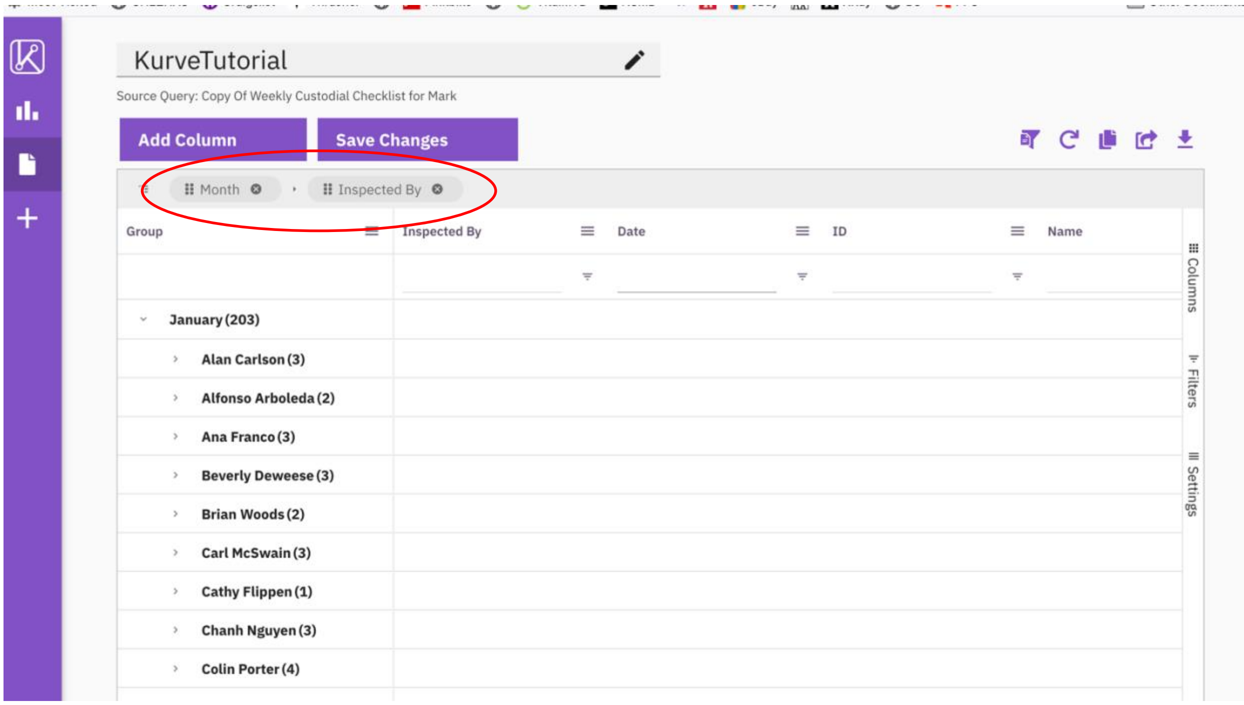


I will use this column now to group by the month so that I can see each month and who has submitted their reports (as well as how many submissions) each month. Let's click and hold next to the "Month" name and drag it far over to the left of the report but not in the Group section.

Now, we will do another aggregation of the data based on the month. So, click on the three bar icon and move your mouse over Value Aggregation and select the option First.



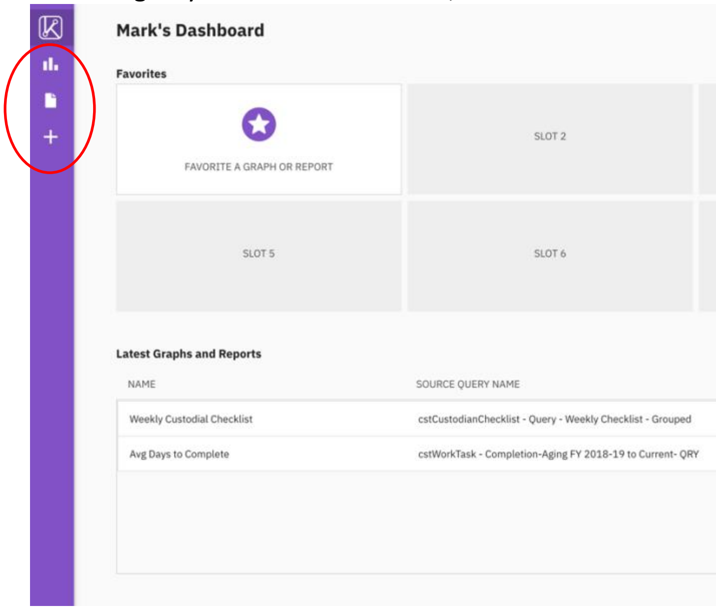
Now, I'd like for this to be tidied up all in on grouped column on the left so I'm going to click and hold on the First(Month) column and drag it in front of Inspected By in the grouping area.



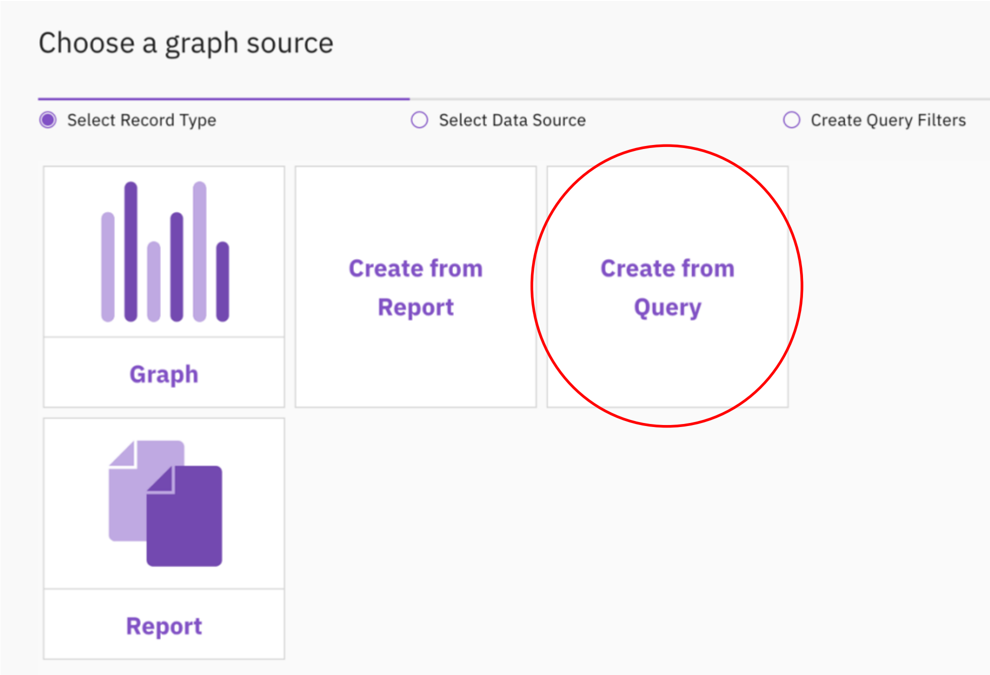
Now, I can see who has submitted their reports for the month of January and a count of how many reports they have submitted so far. Click Save Changes and you're done with your report! You can now easily access and reconfigure your report in your dashboard.

Creating a Graph in Kurve

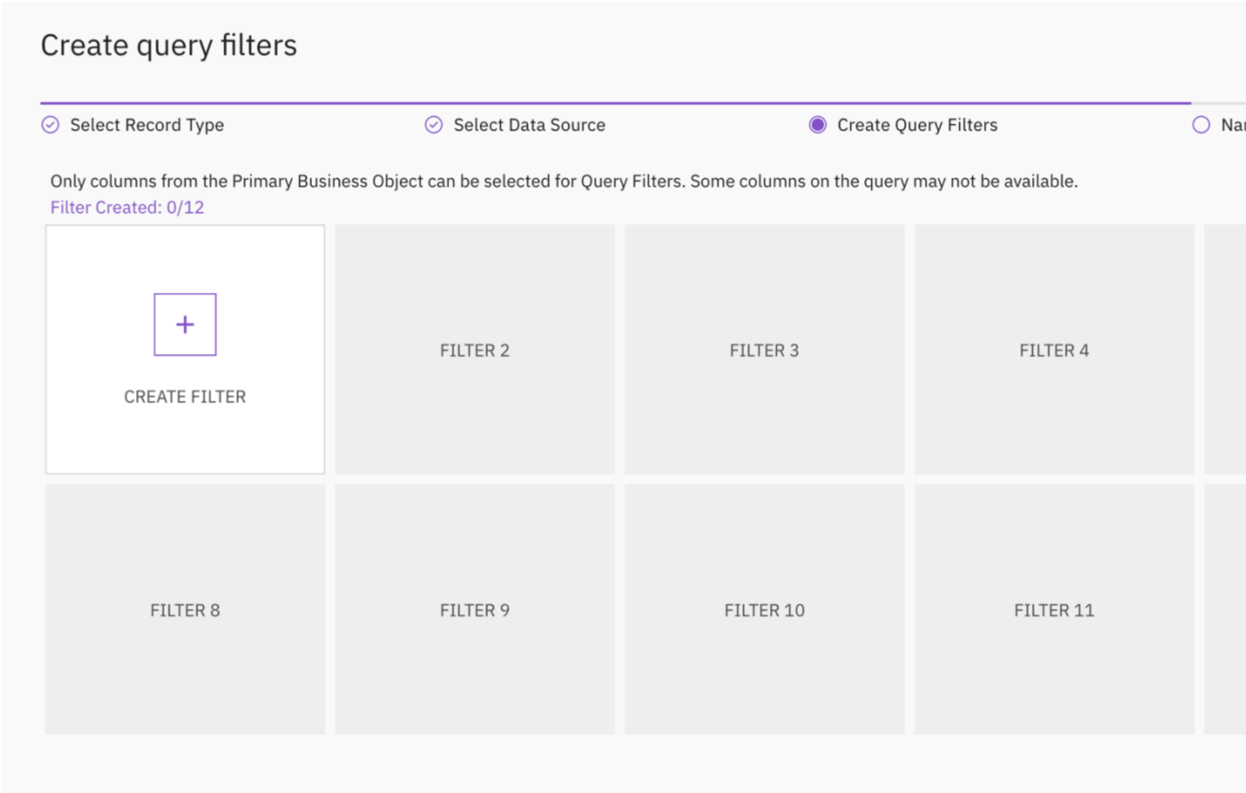
So, Reports are neat but they don't give us a visual representation of the data we house. If you want more of a graphical display, we can create a Graph using Kurve from one of our Tririga Reports. Returning to your Kurve dashboard, click on the + button and we can choose the Graph icon this time.



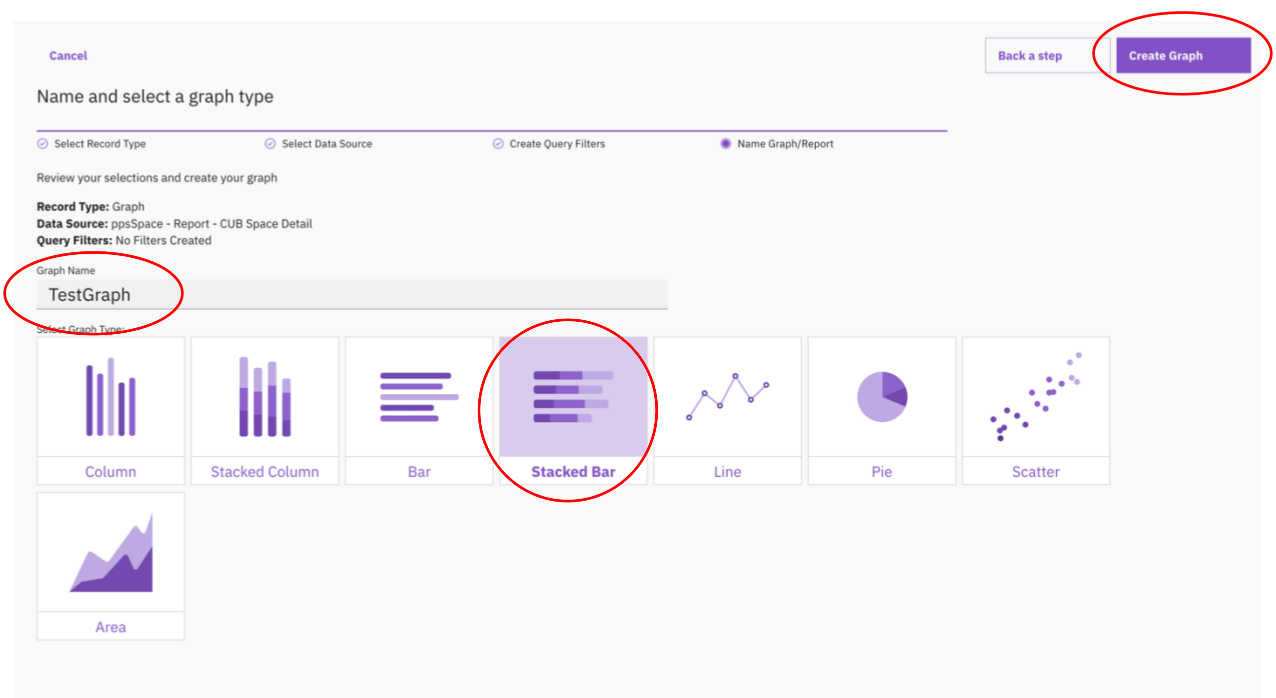
Let's create a graph using a Query that is shared in the Community Reports in Tririga.



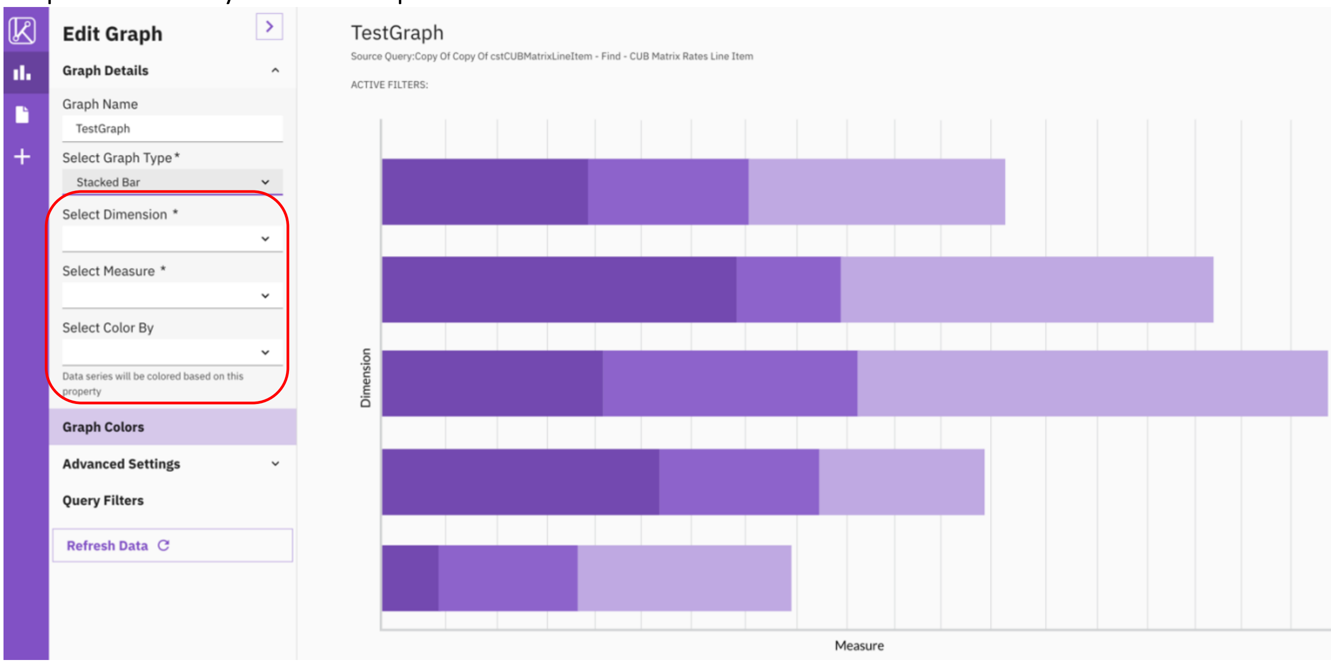
If you want to create a Query Filter in the next step, you can. Otherwise, click Skip and proceed to building the Graph.



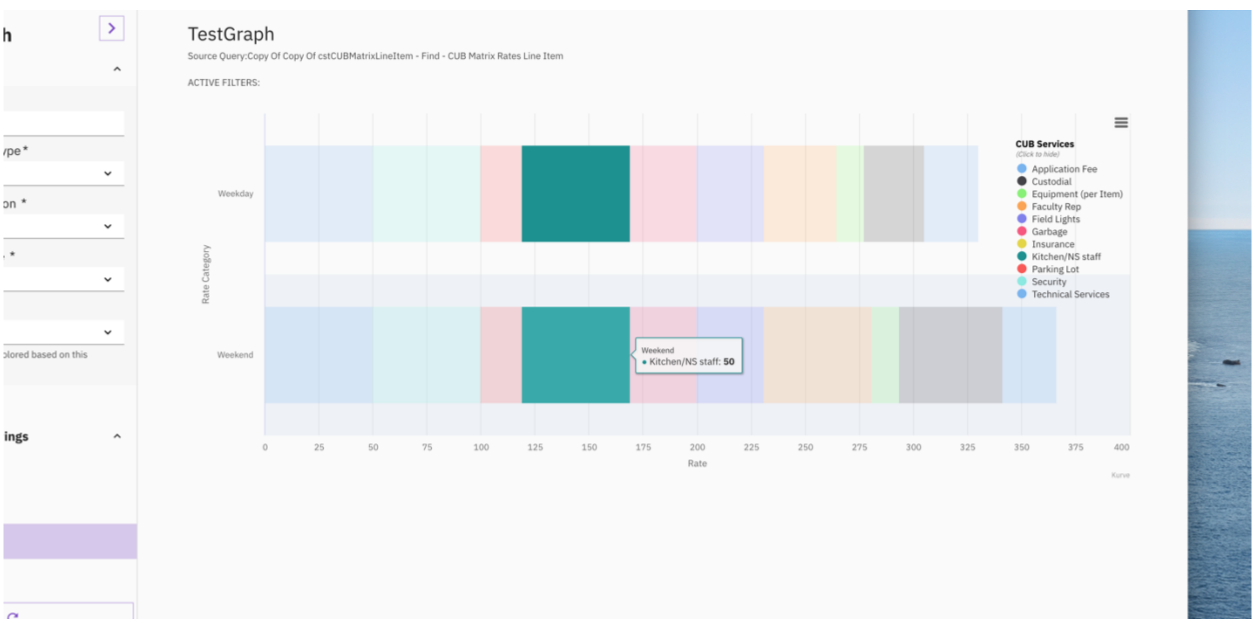
Now we get into the good stuff! Decide on the type of Graph you are wanting to represent with your data. Remember, what you choose as the Graph Name can't be changed later or you would have to recreate your Graph.



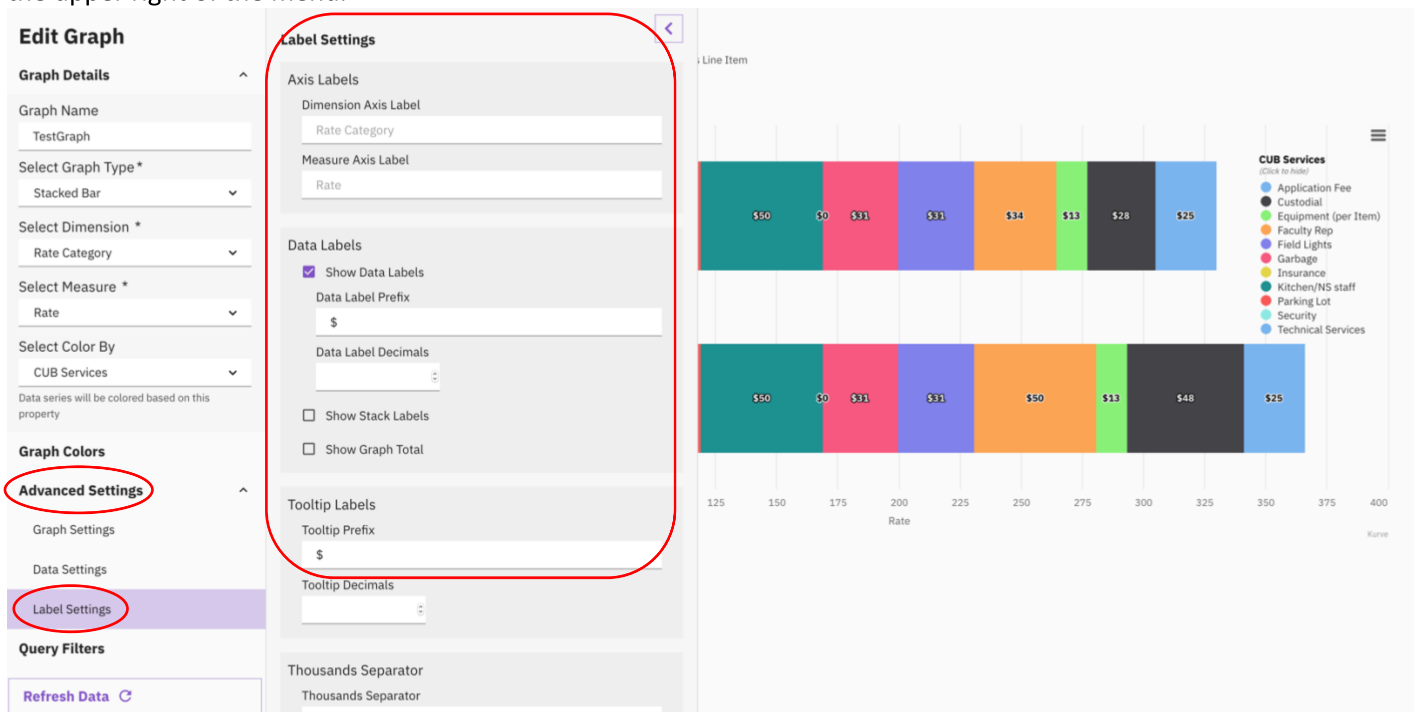
In this case, we will name our Graph ("TestGraph") and choose a Stacked Bar Type. Select the Create Graph button and you should be presented with this:



Now, you will have the options to personalize the Graph to display the data as you see fit. You can check your Dimensions, Measures, Colors and change the Graph colors, advanced settings and even your query filters. Feel free to play with all of them to achieve how your data is telling its story.
For this Graph, I will use 'Rate Category' as my Dimension, 'Rate' as my Measure and 'CUB Services' as my coloring for this Graph. At this point we have a working graph that breaks down the CUB Services by a Weekday/Weekend rate category. If you hover over one of the services you will see the specified rate. In this case, it's a Kitchen/NS staff rate on the weekend:



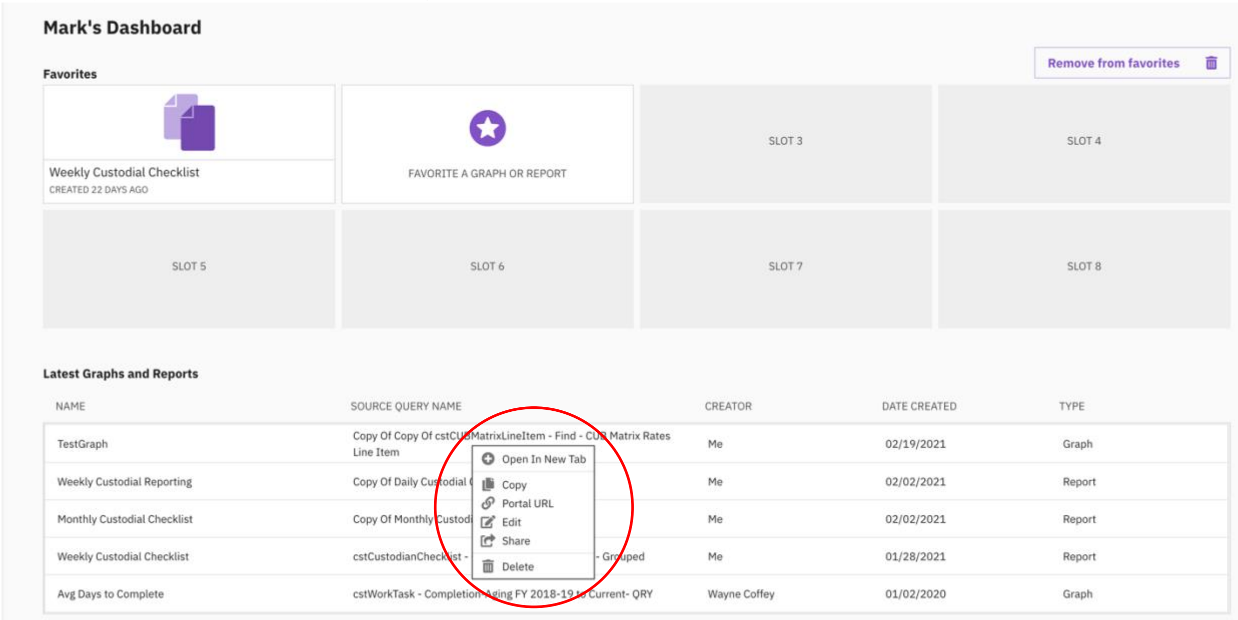
I'd like for the graph just to show the rates as labels though so I will go in and click on Advance Settings on the left. That will drop down an additional set of options. Click the Label Settings option and new menu will come up where you can set many different options for the labeling within the Graph. I will select Show Data Labels, add '$' in the Data Label Prefix option. In addition, I want to add '$' in the Tooltip Prefix to add a dollar sign when you hover over a section. Now, minimize the menu using the < in the upper right of the menu.



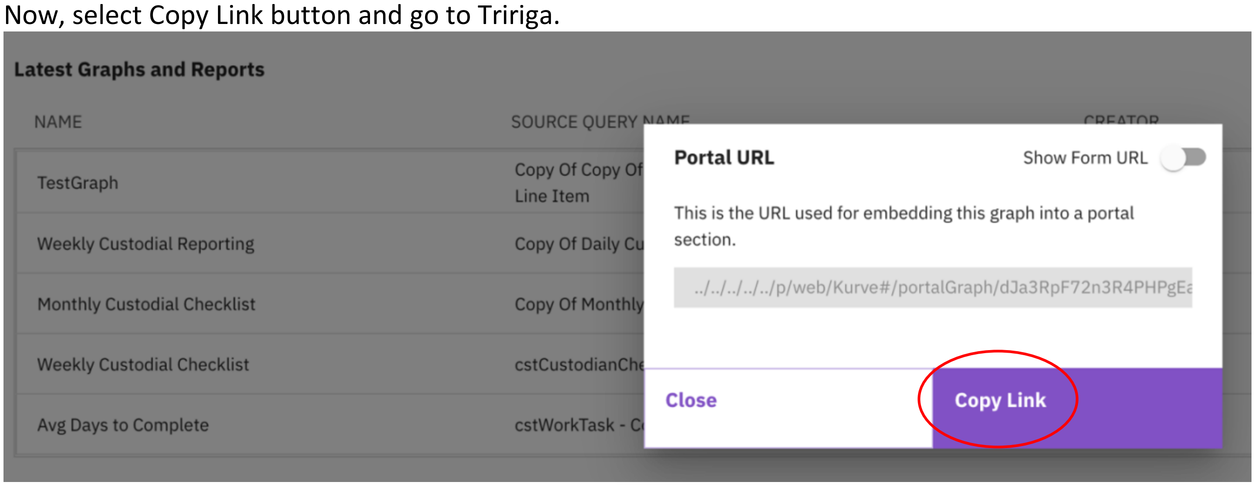
This is basically what I wanted the Graph to display, so I will click Save Changes in the lower left part of Kurve. That's a basic tutorial of how to get going with graphs in Kurve. Could you make something more dynamic in another program? Certainly. Could you share that in a Tririga portal? No. There is a lot you can do using this basic platform and it is a quick way to give easy to understand information on a front page for a Tririga user.

Sharing Kurve Reports/Graphs in Tririga Portals

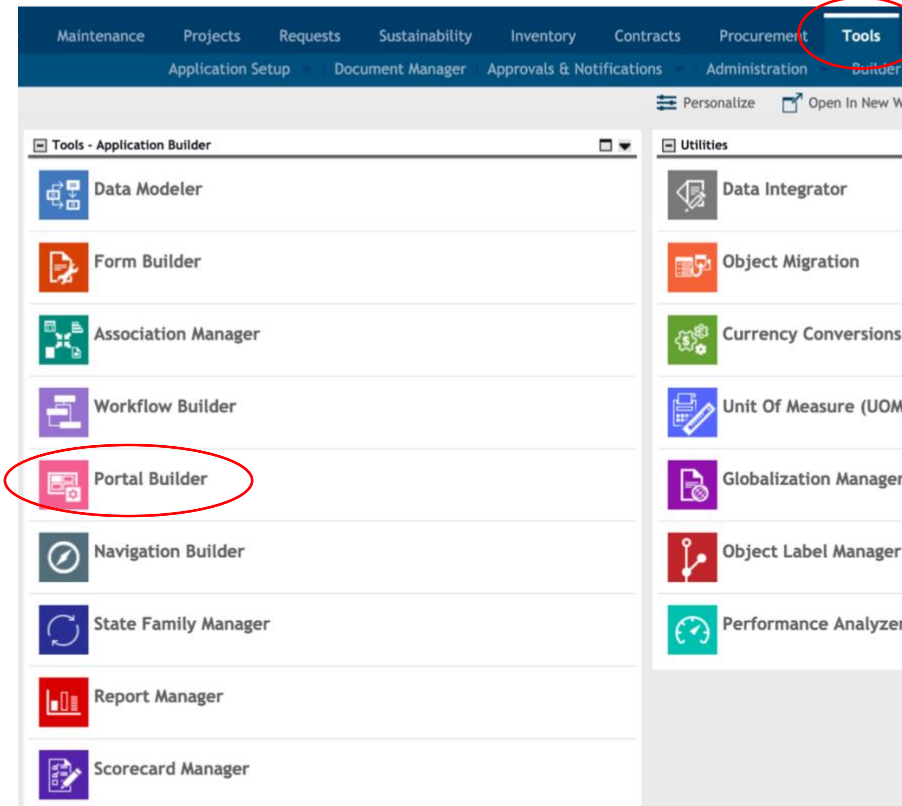
A nice aspect of the plug and play nature of Kurve and Tririga is that you can share these informatics either in a Portal or Form section of Tririga. In your Kurve Dashboard, if you right click on the Graph or Report you'd like to share, you will get a new menu.



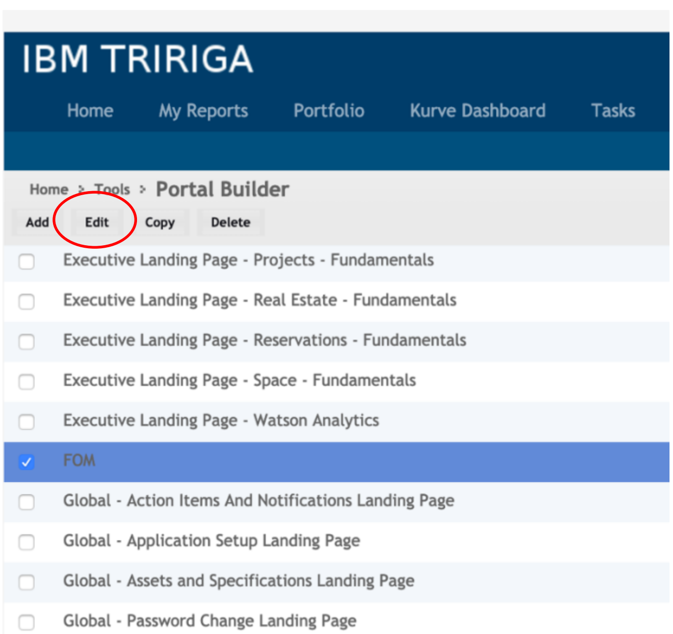
If you select the Portal URL option, it will provide you with a link you can copy and take over to Tririga. Now, select Copy Link button and go to Tririga.



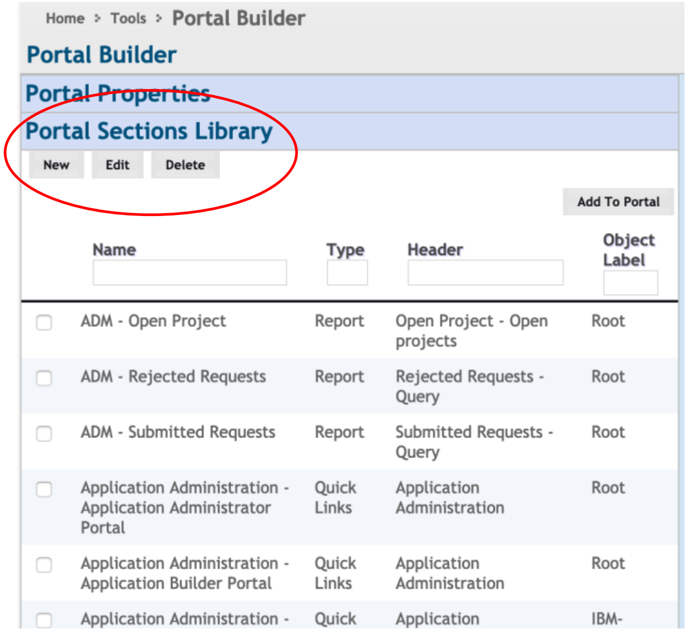
Go to the Tools tab and click on the Portal Builder.



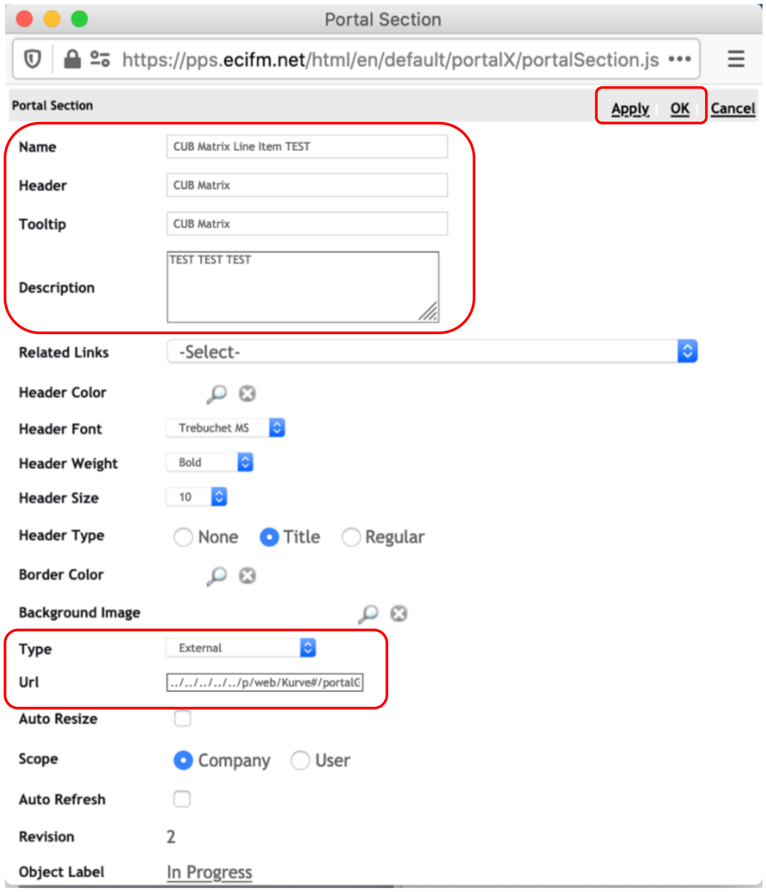
Find your Tririga portal by scrolling through the list or search in the search box. Check the checkbox and click the Edit button.



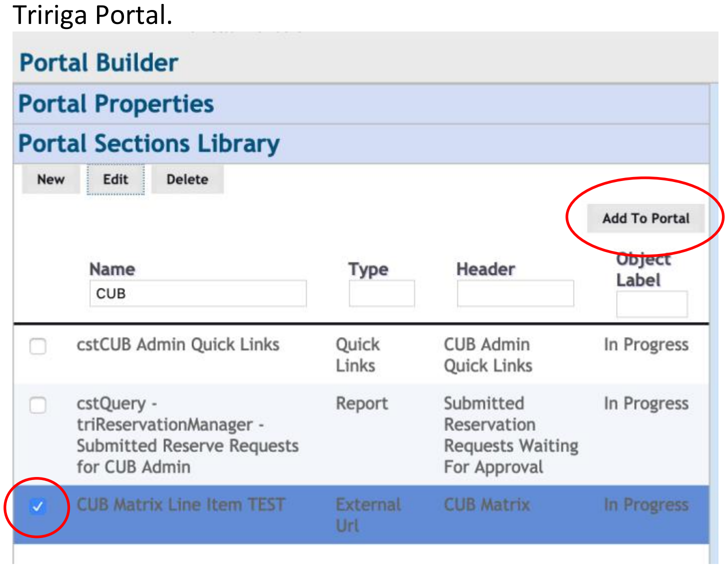
Click down on the Portal Sections Library to expand that section. We need to create a new Portal Section for the Graph or Report we are wanting to display. Click the New button.

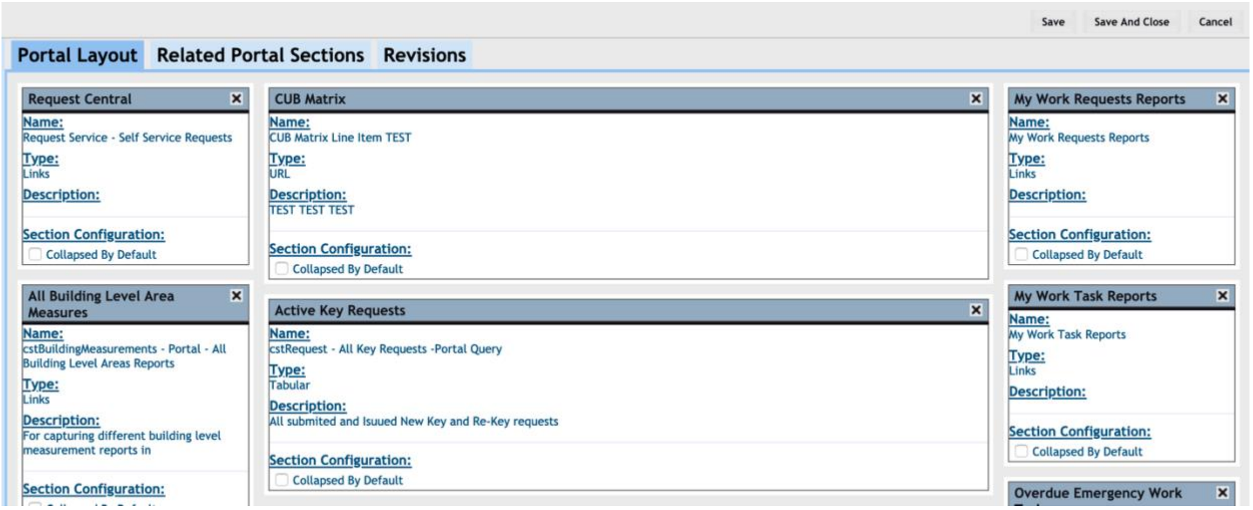


This screen will pop in a separate window. Fill in the appropriate sections and go down to the Type selection and choose the drop down list. Select “External” and then enter the URL we copied in Kurve. This will work for all of our needs for now as far as options. Select Apply and then OK.



You will now see your new Portal in the Portal Sections Library. Check the checkbox to the left of your Portal Section and click the Add To Portal button. This will add this Section into your Portal layout. On the right side of the screen you can adjust where you want the Kurve Graph to be displayed in the layout of the portal. Click Save and Close and go to that Portal and you should see your Graph displayed in the Tririga Portal.





Now your new Kurve Graph is displayed in your Tririga Portal and will update with any data updates. Good job!