ESRI Business Analyst Server 9.3.1

How to create a custom report in Business Analyst Server



Version 1.0

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Introduction

ESRI Business Analyst Server is a server-based business solution that integrates business logic with Geographic Information Systems (GIS). It allows users to perform analyses, create reports and publish business data and workflows across their organization.

It also allows users to bring in custom data to create custom reports. A custom Business Analyst Datasource (BDS) layer can be used with the ESRI Business Analyst suite of products as a data source for creating custom report templates.

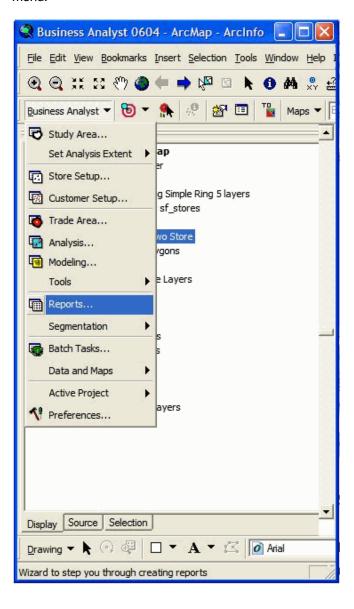
This document uses the CrimeBG.bds layer as a working example to illustrate the steps needed to create a custom report template in the Business Analyst Desktop and then to use the custom report template in the Business Analyst Server.

The creation of the CrimeBG.bds layer is described in detail in the "BAServer - How to Add Custom BDS Layer.doc" document. The CrimeBG.bds layer uses BGCRIMe.dbf file as a working example.

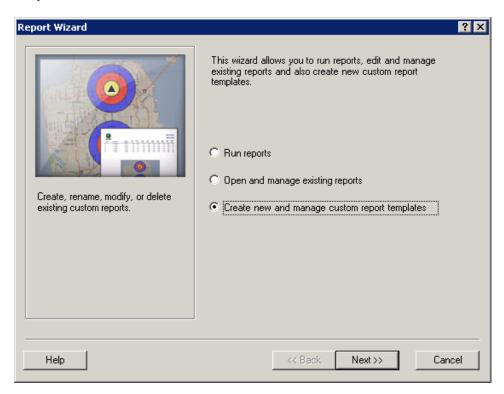
Creating a Custom Report Template Using Advanced Editor

Business Analyst allows you to create custom report templates using custom data or Business Analyst data. The Advanced Editor tool is used to create, update, and save custom report templates.

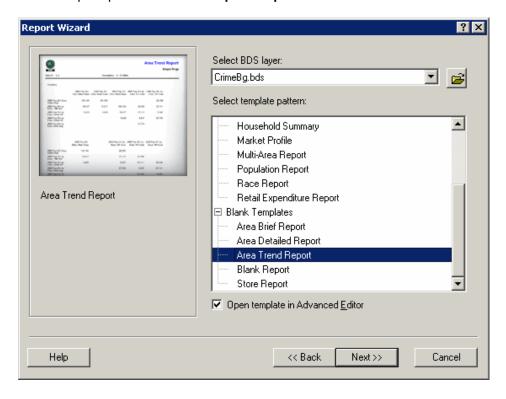
In ArcGIS Desktop, open ArcMap. Highlight and click **Reports** from the Business Analyst menu.



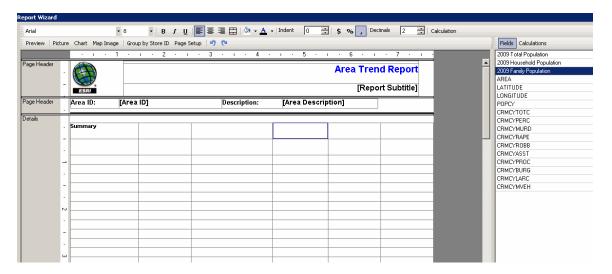
This starts the Report Wizard. Click the **Create new and manage custom report templates** radio button. Click Next.



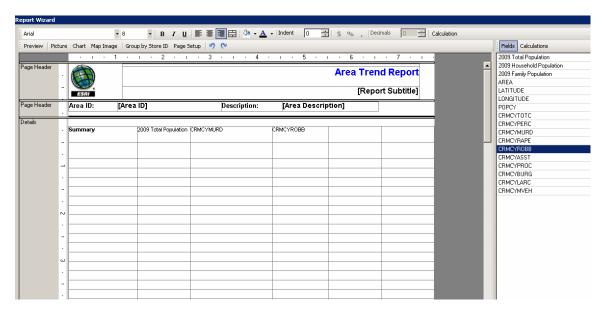
Next, select CrimeBg.bds layer from the map using the Select BDS layer drop-down list or browse the layer in the file system clicking Browse. Highlight Area Trend Report under Select template pattern. Check the **Open template in Advanced Editor**. Click Next.



The Advanced Editor opens. Here you can create your own report, select the fields in the report, choose a report header, name, report subtitle, details, report footer, page footer, etc.



Drag the 2009 Total Population, CRMCYMURD, CRMCYROBB fields from left side of the panel to the main report area.



Enter **Crime Risk** in the report header placeholder, titled Area Trend Report in the example shown above, and click Next.

Enter template name:

| Crime Risk|
| Enter template title (optional):

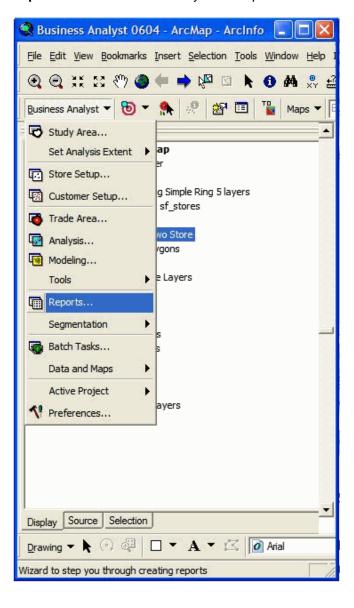
| Finalize your template. | Cancel |

Enter "Crime Risk" as the template name and click Finish.

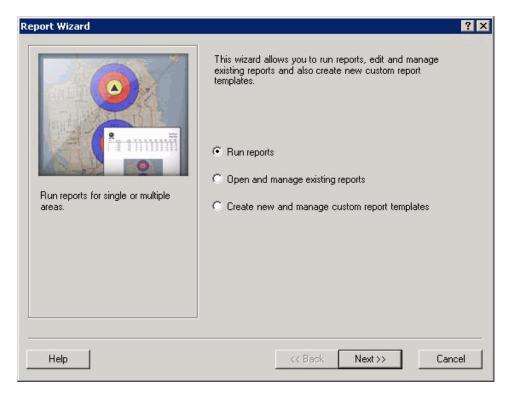
Running a Custom Report in Business Analyst Desktop

To run a custom report, you need to create a layer containing custom polygon geometries. For example, you can create a store layer using Business Analyst Desktop and then create a drive time polygon trade area of 1, 2, and 3 minutes around this store. As an example, name the drive time polygon trade area "Drive Time Polygon 1".

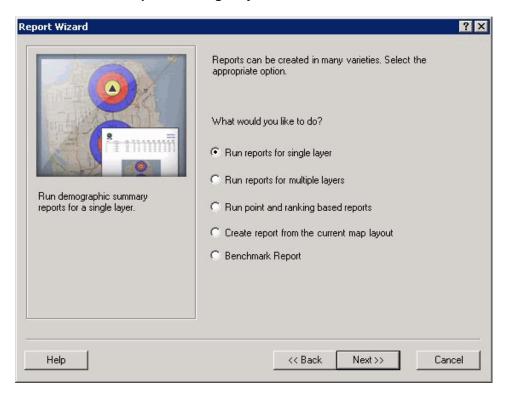
In ArcGIS Desktop, open ArcMap. Ensure that the "Drive Time Polygon 1" layer is added to the map. If not, add it to the map with File > Add Data. To create a report for this layer using the Crime Risk template that was created in the previous section, highlight and click **Reports** from the Business Analyst Desktop menu.



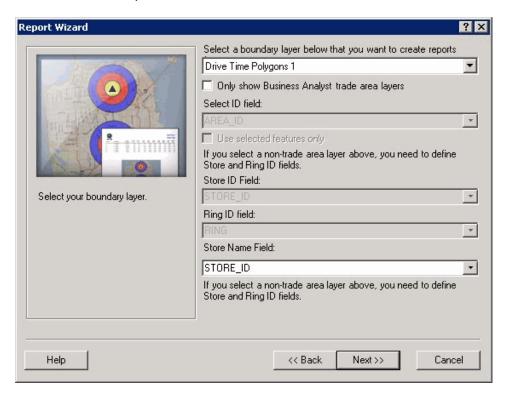
Select the Run reports radio button and click Next.



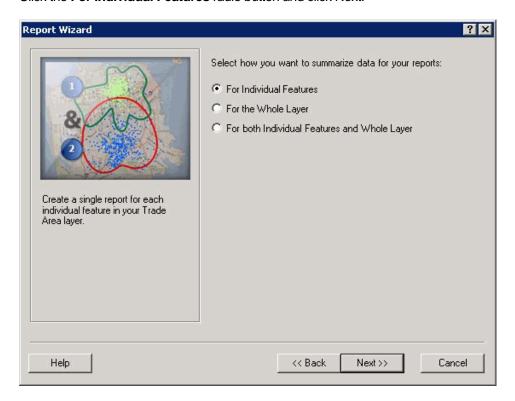
Next, click the Run Reports for single layer radio button and click Next.



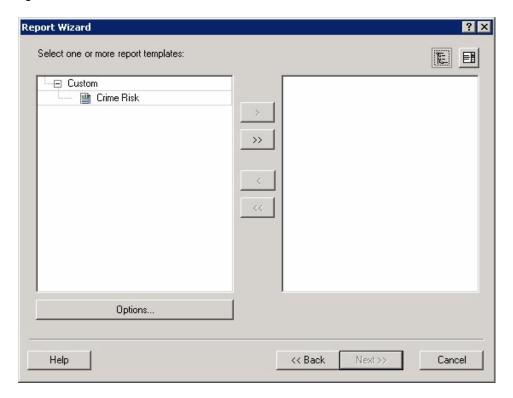
Select the "Drive Time Polygon 1" layer as a boundary layer. Select STORE_ID in the Store Name Field drop-down list and click Next.



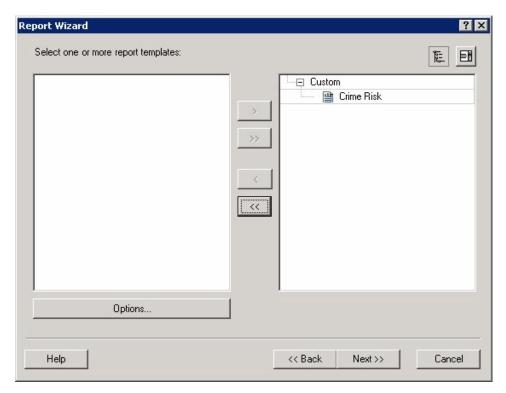
Click the For Individual Features radio button and click Next.



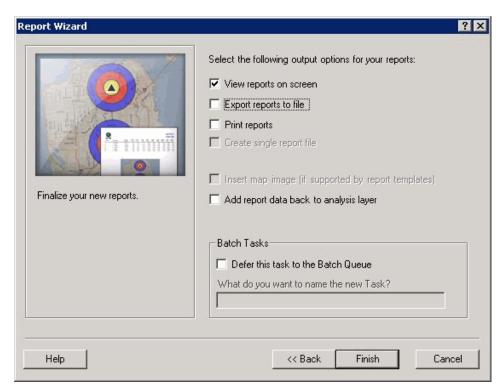
Next, highlight Crime Risk and click the single left arrow button to move the template to the right window.



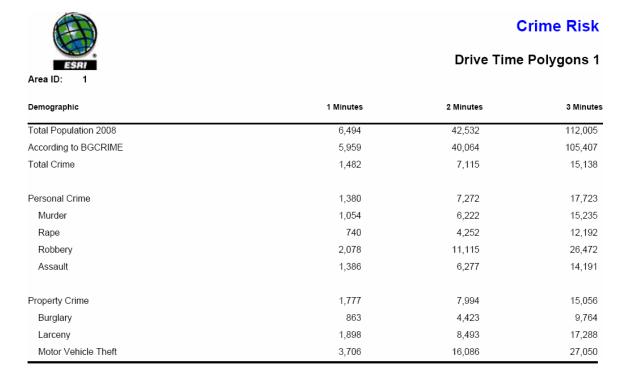
Click Next.



Click the View reports on screen check box and click Finish.



A report appears with the selected values from the "Drive Time Polygon 1" layer.

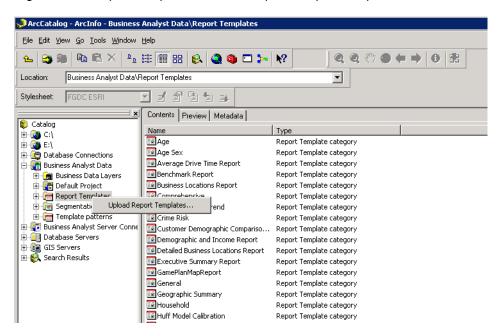


Uploading a Custom Report Template into Business Analyst Server

The Upload/Download Projects feature allows you to import a custom report template from Business Analyst Desktop to Business Analyst Server.

In ArcGIS Desktop, open ArcCatalog. Navigate to Business Analyst Data > Report Templates.

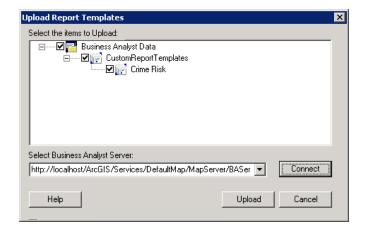
Right-click on Report Templates, then click Upload Report Templates.



Check the Crime Risk template and specify the URL to the Business Analyst Server instance in the Select Business Analyst Server drop-down list.

Click Connect. If security settings are enabled, you may need to enter your user name and password.

Click Upload.



Select the items to Upload:

Description:

Select the items to Upload:

Description:

Business Analyst Data
Description:

Business Analyst

Successful operation

Select Business A

http://localhost/4

Help

Upload Cancel

The Crime Risk template has been uploaded to your server location.

The uploaded report template is added to the list of all Business Analyst server report templates into the **Custom Reports** category. A custom report template can be later used in Summary Reports analyses.

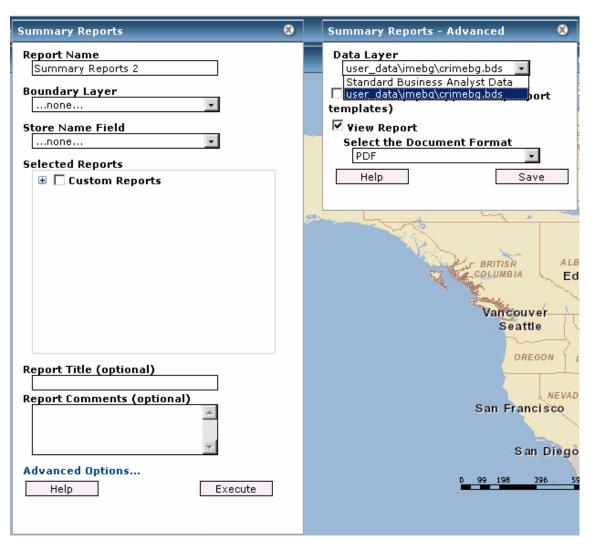
Creating Custom Reports in Business Analyst Server

Custom BDS layers together with custom report templates can be used for creating custom reports using Analysis Center web application.

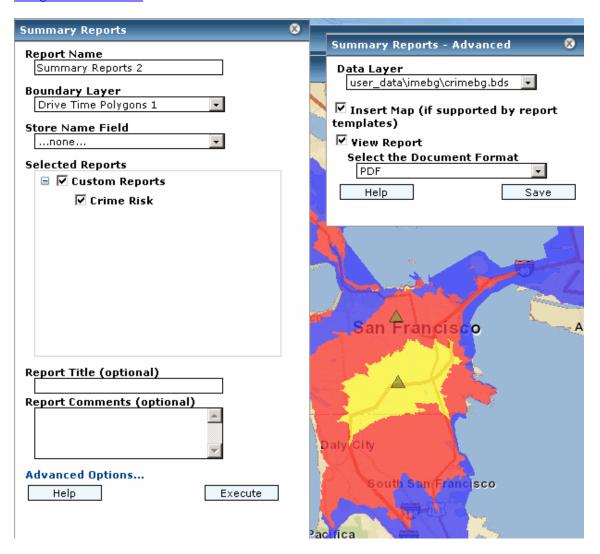
To create a business report using the custom BDS layer, follow these steps:

- 1. Click the Tasks pane to open.
- 2. Click the plus sign to expand Reports.
- 3. Click Summary Reports.
- 4. Enter the Report Name
- 5. Select a boundary layer. This can be a trade area you have previously created.
- 6. Optionally, select a Name Field
- 7. Click the Advanced Options
- 8. The Summary Reports Advanced dialog box appears.

Choose your custom BDS layer from the Data Layer, select crimebg.dbs as the Data Layer.



In the Summary Reports dialog box, click Custom Risk from the Summary Reports. Custom Risk is the custom report created in the <u>Creating a Custom Report Template</u> Using Advanced Editor.



Click Execute to generate the selected report using the custom BDS layer and custom report template that you uploaded. A report is generated using the custom BDS layer.



Crime Risk

Drive Time Polygons 1

Area			

Demographic	1 Minutes	2 Minutes	3 Minutes
Total Population 2008	6,494	42,532	112,005
According to BGCRIME	5,959	40,064	105,407
Total Crime	1,482	7,115	15,138
Personal Crime	1,380	7,272	17,723
Murder	1,054	6,222	15,235
Rape	740	4,252	12,192
Robbery	2,078	11,115	26,472
Assault	1,386	6,277	14,191
Property Crime	1,777	7,994	15,056
Burglary	863	4,423	9,764
Larceny	1,898	8,493	17,288
Motor Vehicle Theft	3,706	16,086	27,050