How to use the Statistic Summary builder tool

The statistic summary builder lets you create statistic summary templates, with full control over the statistics, charts, and terminology used. Templates can then be used to create summaries, with the ability to apply filters to all statistics in the summary.

The following topics will be covered in this guide:

- 1 – How to create a statistic summary template

- 2 – How to add a section to a template

- 3 – How to add a statistic to a template

- 4 – How to add automatic numbering to a template

- 5 – How to create a summary

- 6 – How to add filters to a summary

1 – How to create a statistic summary template

- Hover over **Intelligence** and select **Statistic Summaries (New)**

- Click on **Actions** and select the **Manage Templates**

- Click on the **Plus** icon +

- Enter a **Name** and **Description**

- Click **Submit**

You will be taken to the template configuration page. From here, you can add sections and statistics.
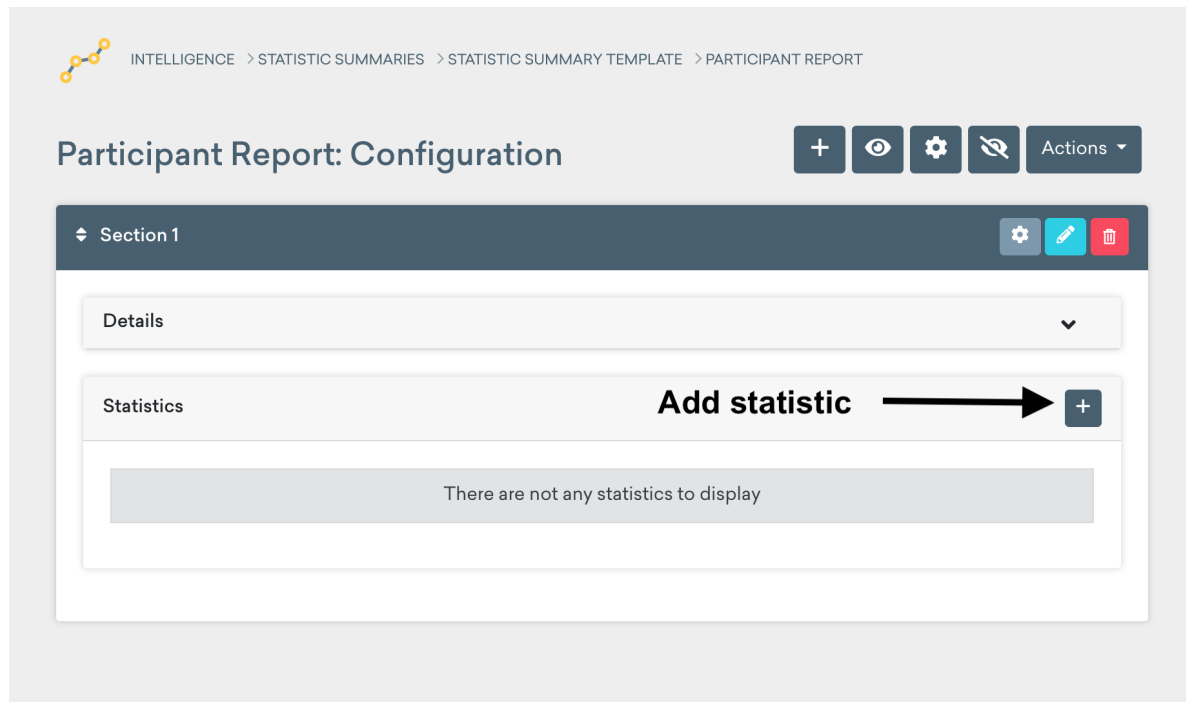
Views

2 – How to add a section to a template

- Click on **Actions** and select **Add Object**

- Under **Type** select **Section**

- Enter a **Title** for the section. Further information, such as a subtitle and description, can also be added

- Click **Save**

3 – How to add a statistic to a template

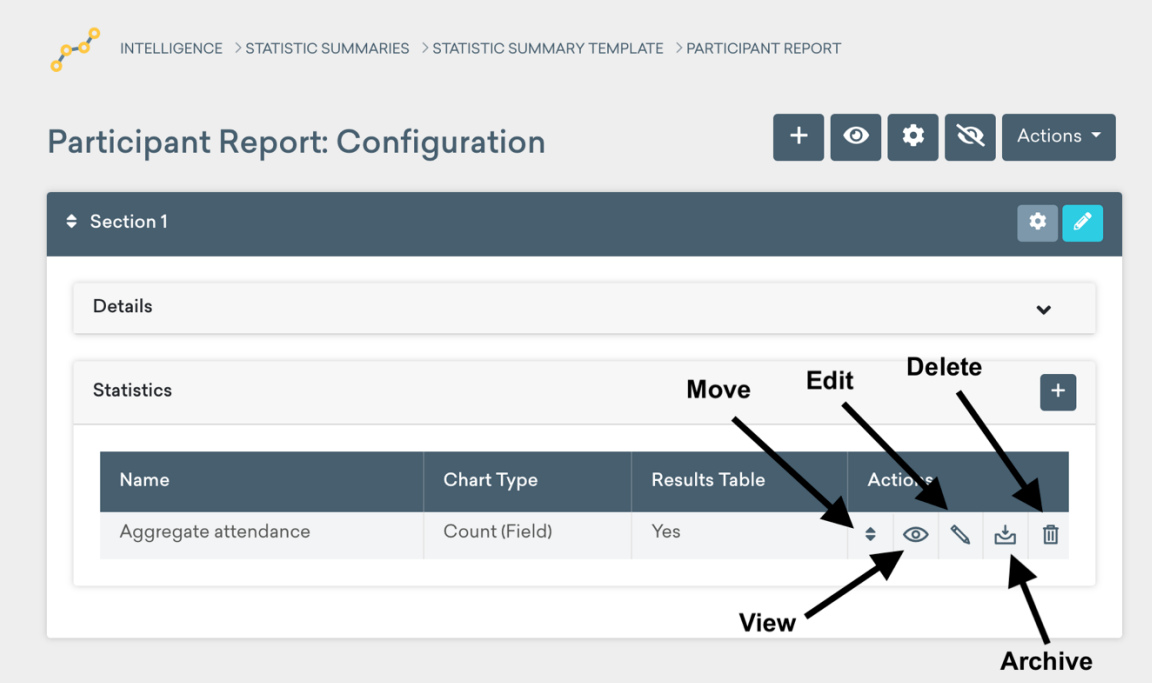- Click on the **Plus** icon within the relevant section

- Under **Select a Statistic**, choose the relevant statistic[*]

- Enter a **Name** for the statistic

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[*] For instruction on creating new statistics, see the 'How to Create a Statistic' guide at https://www.substance.net/intelligence-section/

- In the **Configuration** section, select the chart display for the statistic

- Click **Submit**

The statistic will be added to the template. Repeat the process for all statistics you wish to add. Various action buttons are available to interact with the statistic:

4 – How to add automatic numbering to a template

- Click on **Actions** and select **Global Numbering Configuration**

- In the **Sections** tab, you can apply numbering to the sections of your template. Three config fields will be displayed:

  - **Numbering Format** – select whether the format should be **Numeric** (1, 2, 3), **Alpha** (A, B, C) or **Roman Numerals** (I, II, III)

  - **Upper / Lower** – select whether the casing should be **Upper** (A, B, C / I, II, III) or **Lower** (a, b, c / i, ii, iii)

  - **Append Character** – select whether to append a **Period** (1. 2. 3.) or **Closed Bracket** (a) b) c)) to the numbering

- In the **Fields** tab, you can apply numbering to the statistics on your form. Five config fields will be displayed:

  - **Numbering Format** – select whether the format should be **Numeric** (1, 2, 3), **Alpha** (A, B, C) or **Roman Numerals** (I, II, III)

  - **Add section numbering to fields** – select whether the section numbering should also be applied to the statistics. For example, if the statistics belong to section **A**, all statistics would display the letter **A** at the beginning (e.g. A.1., A.2., A.3.).
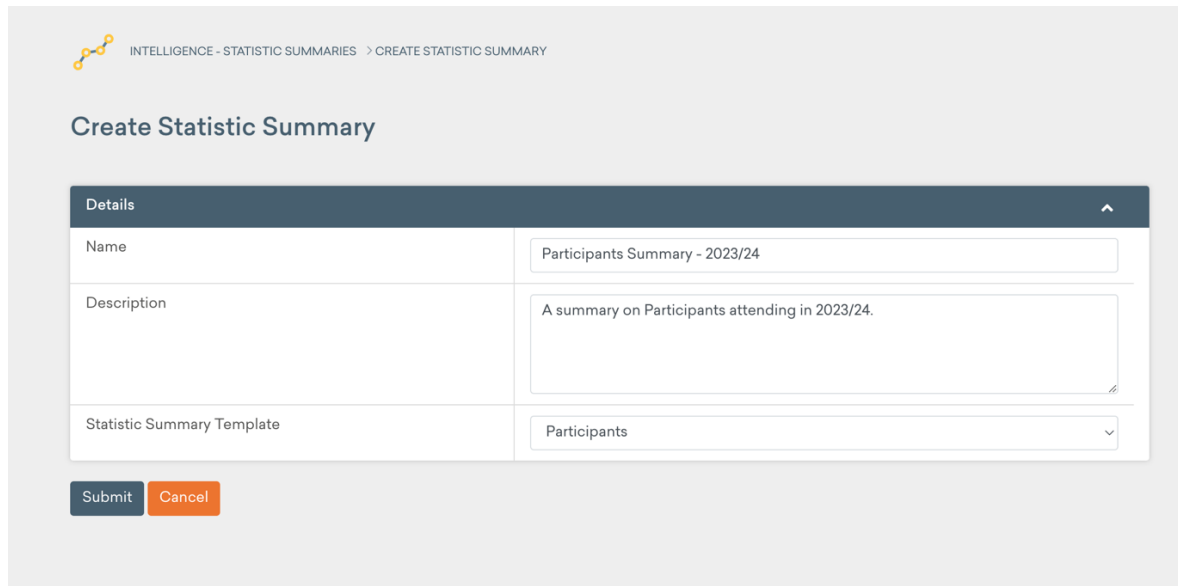
- o **Numbering convention** – select whether all statistics should be numbered **Consecutively** (Section A: 1, 2, 3, 4 / Section B: 5, 6, 7, 8) or **By Section** (Section A: 1, 2, 3, 4 / Section B: 1, 2, 3, 4)

- o **Upper / Lower** – select whether the casing should be **Upper** (A, B, C / I, II, III) or **Lower** (a, b, c / i, ii, iii)

- o **Append Character** – select whether to append a **Period** (1. 2. 3.) or **Closed Bracket** (a) b) c)) to the numbering

The selection that you choose under **Global Numbering Configuration** will be applied throughout the template. However, you can change the config for individual sections if you need to. Simply select the cog icon next to any section on the template.

5 – How to create a summary

- Hover over **Intelligence** and select **Statistic Summaries (New)**

- Click on the **Plus** icon [+]

- Enter a **Name** and **Description**

- Choose the **Statistic Summary Template** to base the summary on [see section 1 above]
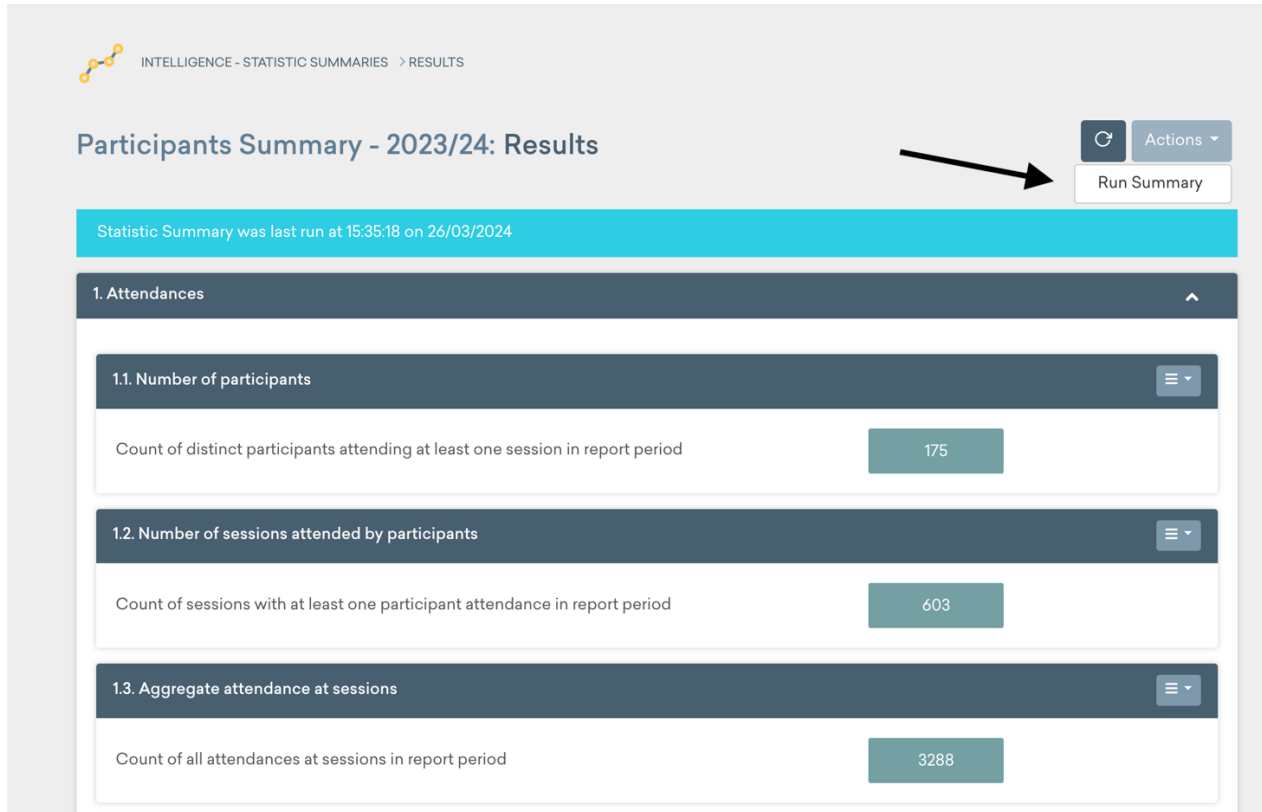
- Click **Submit**

![Views logo]

- Click **Actions – Run Summary** to generate the report

INTELLIGENCE - STATISTIC SUMMARIES > RESULTS

Participants Summary - 2023/24: Results

[Actions ▾]

Run Summary

Statistic Summary was last run at 15:35:18 on 26/03/2024

1. Attendances

1.1. Number of participants

Count of distinct participants attending at least one session in report period   175

1.2. Number of sessions attended by participants

Count of sessions with at least one participant attendance in report period   603

1.3. Aggregate attendance at sessions

Count of all attendances at sessions in report period   3288

Views

6 – How to add filters to a summary

- When viewing a summary [see section 5 above], click on **Filters** from the menu items on the left

- Click on the **Plus** icon, complete the form and click **Save**. Examples of filters that could be created are:

    o   Participants – Gender – is – Female

    o   Attendance – Attendance Date - is greater than – 01/01/2021

    o   Sessions – Activity – is one of – Football, Rugby, Tennis

    o   Venues – Venue Type – is not – Community Centre

- By default, the filter will be applied to all applicable statistics in the template. To change this, click on the **cog** icon, untick the statistics that you do not wish to include and click **Submit.**

- Repeat the process for any additional filters that you wish to add, then click **Results** on the left-hand side to run the summary with the filters applied