

# METRICS & REPORTS



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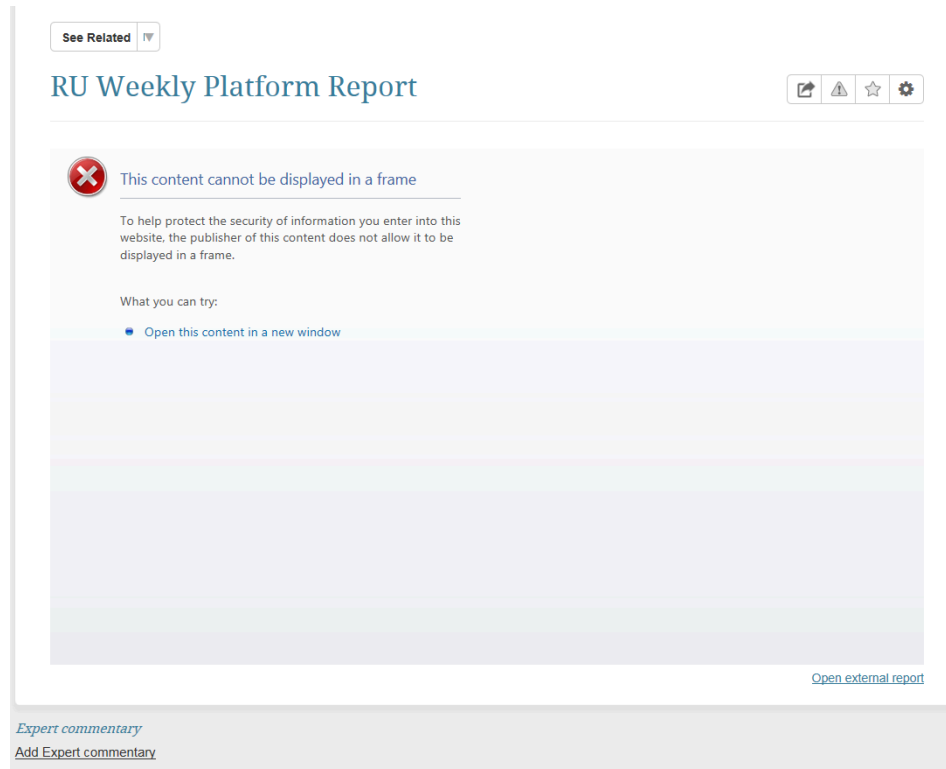
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# External Reports

# External Reports (Tableau) are opening in Metric Insights Viewer with the error: "This content cannot be displayed in a frame."

## Issue



We have noticed that we can't open external reports (Tableau) in viewer, following error appeared: "This content cannot be displayed in a frame. To help protect the security of information you enter into this website, the publisher of this content does not allow it to be displayed in a frame."

## Resolution

Issue may be caused by Clickjacking protection in Tableau Server, you can read about it here <http://kb.tableau.com/articles/knowledgebase/clickjacking-protection>. Disabling Clickjacking protection can fix the issue.

You need to follow Step 2 from article <http://kb.tableau.com/articles/issue/error-this-content-cannot-be-displayed-in-a-frame>:

1. On the computer running Tableau Server, open the command prompt as an administrator.
2. Navigate to the Tableau Server bin directory:

```
cd "C:\Program Files\Tableau\Tableau Server<version>\bin"
```

### 3. Run the following commands, in order:

```
tabadmin stop  
tabadmin set wgserver.clickjack_defense.enabled false  
tabadmin config  
tabadmin start
```

# How To Create a Change Report for Text Fields ~ Change in Order Status

This is an example of how to create a change report to show you only items that have changed from the last report. In this case a client's order goes from 'on time' to 'at risk.'

## Here is my Report of Orders with Status

Tuesday 05/03/2016

Data for: Tuesday 05/03/2016

Order Status SSL

Order Status SSL				
client	Status	Date	order number	
abc shoes	on time	2016-05-03 00:00:00	1234	
donut shop	on time	2016-05-03 00:00:00	9876	
a1 automotive	on time	2016-05-03 00:00:00	4343	

I have orders from three clients on 5/3. I want to know if any of them go from 'on time' to 'at risk'. This report 'keeps history' each day (also called a snapshot report).

## Creating the Change Report Setting - Key Value

Source Report **Order Status SSL**

Create Report when ☐ there are new items | ☐ items have been removed | ☒ **certain values have changed**

### Key Field

Key fields will uniquely identify rows in the snapshot data set, e.g. a customer ID would be an identifier from which you could create an Exception Report for a customer.

Select key fields	
Column	Type
<input checked="" type="checkbox"/> client	text
<input type="checkbox"/> Date	datetime
<input checked="" type="checkbox"/> order number	numeric
<input type="checkbox"/> Status	text

The 'client' and 'order number' fields identify unique values (customer orders). (This is creating the primary key for DB folks.)

## Filter Logic -- Choose what column to look for changes ( on time --> at risk)

### Filters

Specify filters to determine which changes to include in the Report.

Filters				+	🗑️
Report Instance	Column	Filter Type	Comparison Value		
current	Status	equals	at risk	⚙️	🗑️
prior	Status	equals	on time	⚙️	🗑️

Page 1 of 1

Displaying records 1 - 2 of 2

Select rows when **all** of the filters are satisfied

**+ Add filter**

You need two filters: one for the prior report's status column to equal 'on time', and the second filter to look at the current report's status column for 'at risk.'

Make sure 'Select rows when ALL of the filters are satisfied. This is the 'AND' condition for the filter. Otherwise it will be an 'OR' statement.

# Columns to Show on change Report

## Columns to fetch

Select the fields for your Report

Columns to fetch

<input type="checkbox"/>	Column Name	Type	Report instance	
<input checked="" type="checkbox"/>	client	text	current	
<input type="checkbox"/>	Date	datetime	current & prior	
<input checked="" type="checkbox"/>	order number	numeric	current	
<input checked="" type="checkbox"/>	Status	text	current & prior	

Run history

I only need to see the Client, Order number, and Status on my Change Report. I choose to only show the current and prior value for the 'status' column since I know the client and order number will be the same on both reports (they are my key fields!).

## Format Columns (Optional)

Report Columns

Column Name	Display Name	Currency?	Format	Description	Results?	Totals?	
current_client	current client				<input checked="" type="checkbox"/>		↑ ↓
current_status	current status				<input checked="" type="checkbox"/>		↑ ↓
prior_status	prior status				<input checked="" type="checkbox"/>		↑ ↓
current_order_number	current order number	<input type="checkbox"/>	1234567890		<input checked="" type="checkbox"/>	<input type="checkbox"/>	↑ ↓

+ Add formatted field

Include current Day ☐ yes | ☒ no

Preview

Saved

Update live Report

I change the format of the current order number so that the number doesn't have a comma in it (1,234 vs 1234).



# Load data into Change Report (Update live Report)

Data Collection

ate Report when

Identify rows in the s

Update Report History

Do you want to update historical instances of this Report?

☒ yes | ☐ no

Update Report Instances

☒ from specified date | ☐ within specified date range

Update all Report instances

Since 

2016-05-03

If you have made changes to this Report's definition since its live report was last updated, and you want those changes reflected for other historical instances of this report, select the "Yes" radio button above.

Update

 or cancel

+

have changed

create an Exce

I want to look for changes from 5/3 forward.

## Change Report Editor

The screenshot shows the 'Change Report Editor' interface. At the top, there's a dark header with a home icon, 'Report Alert', and 'Order Status SSL Changes Alert'. Below this is a tabbed interface with 'Definition', 'Content', and 'Subscriptions'. The 'Definition' tab is active. The main content area has four sections: 'Report Alert Name' with a text input 'Order Status SSL Changes Alert'; 'Snapshot Report' with 'Order Status SSL' and a link 'Edit Snapshot Report'; 'Change Report' with 'Order Status SSL Changes' and a link 'Edit Change Report'; and 'Alert Rule' with the text 'Send the Order Status SSL Changes report when it Contains at least 1 row' and a link 'Edit Alert Rule'.

Use the 'edit snapshot report' to go to the underlying report and the 'edit change report' to view/modify settings on this change report. You can also click this link and then click the 'View' button to see the report (otherwise you will get it via email on the next change).

## View Change Report

The screenshot shows the 'View Change Report' interface. At the top, there's a dark header with a home icon, 'Report Editor', 'Order Status SSL Changes', and user controls for 'New', 'Admin', 'Mike', and a help icon. Below this is a tabbed interface with 'Report Information', 'Data Collection', 'Report Content', 'Report Distribution', 'Associations', and 'Advanced'. The 'Report Information' tab is active. The main content area has a 'Source Report' dropdown set to 'Order Status SSL'. Below this are radio buttons for 'Create Report when': 'there are new items', 'Items have been removed', and 'certain values have changed' (which is selected). A red arrow points to the 'View' button in the top right corner. Below the radio buttons is a section titled 'Key Field' with a description: 'Key fields will uniquely identify rows in the snapshot data set, e.g. a customer ID would be an identifier from which you could create an Exception Report for a customer.'

# Changes

Wednesday 05/04/2016

Data for: Wednesday 05/04/2016

Order Status SSL Changes

Order Status SSL Changes

current client	current status	prior status	current order number
donut shop	at risk	on time	9876

Add Export Analysis

# How to Alert when a Tableau Extract Fails

## Create a view in Tableau to show Failures

Create a view in Tableau that pulls in data from Tableau's database.

Here are instructions on how to setup a connection to the database:

[https://onlinehelp.tableau.com/current/server/en-us/adminview\\_postgres\\_connect.htm](https://onlinehelp.tableau.com/current/server/en-us/adminview_postgres_connect.htm)

Once your connection is established, query the `_background_tasks` table. The column "finish\_code" will have 0 or 1. 1 means "fail."

Here is a sample query to use in a view:

```
SELECT title, subtitle, notes FROM _background_tasks WHERE finish_code = 1 AND job_name = 'Refresh Extracts'
```

This will provide you with all failed extract refreshes and why they failed. Take a look at the `_background_tasks` table to see what other information you can pull from it, including site, when it was created, when it finished, etc.

## Pull data into Metric Insights to trigger the Alert

Now that you have the information available to alert on, create an alert in Metric Insights. If your view doesn't have a time-series, you will need to have Metric Insights 'snapshot' the data-- add a date column when it is collected.

The alert rule would be against a 'fixed value' where the value is more than 0.