SQL Planner – BI & Reporting – Documentation / How-To

DOCUMENTATION

BI & Reporting — User Guide

Build live dashboards and reports from your SQL databases. This guide covers every feature, from your first chart to folders, permissions, sharing, scheduling and multi-server runs.

Concepts · Quick start · Connections · Widgets · Queries & parameters · Datasets · Filter & cross-filter · Pivot matrix · Settings · Folders & permissions · Sharing · Subscriptions · Run against a server · Templates · Usage · Viewing & export · Troubleshooting

01 Concepts

The building blocks, and how they fit together.

A **report** (or dashboard) is a canvas of **widgets**. Each widget runs one SQL **query** against a **connection** and draws the result — a chart, table, pivot or single number. **Parameters** filter the whole report at once; **folders** organize reports and control who can see them; **share links** and **subscriptions** deliver a report to people who never open the builder.

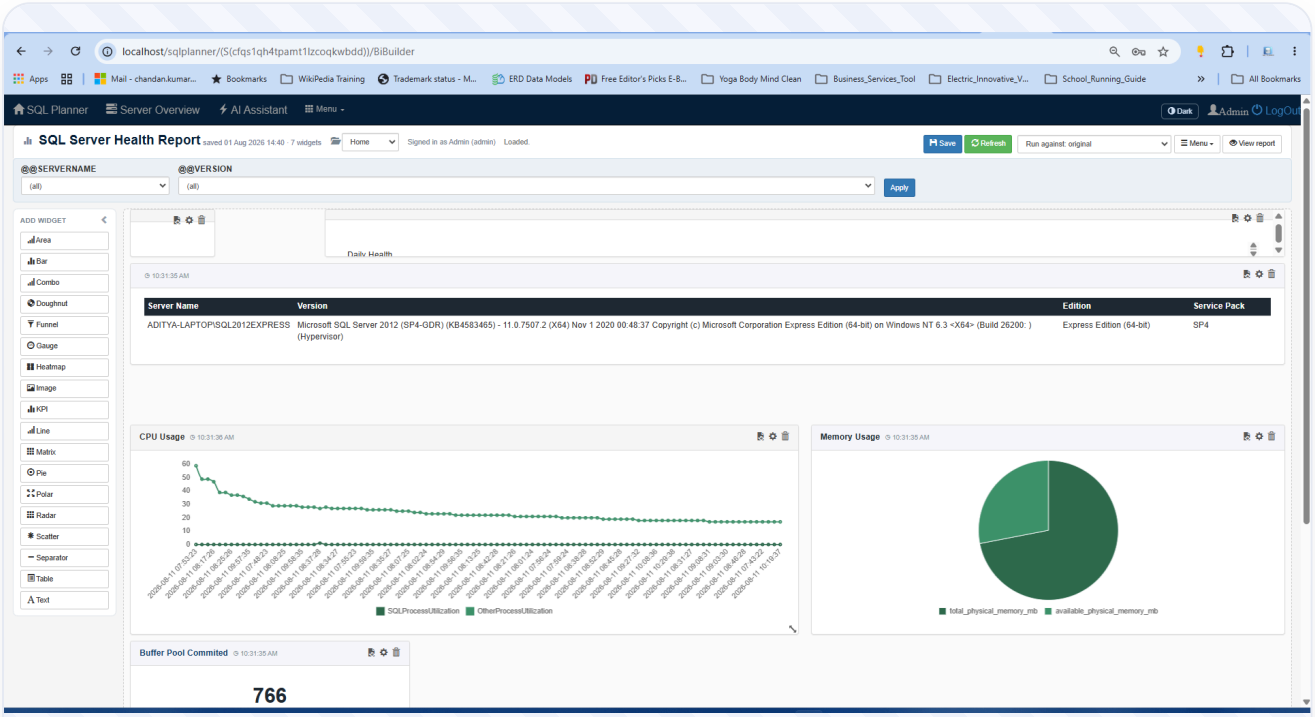
There are two screens: the **Builder**, where you design a report, and the **Viewer**, a clean read-only view for consuming it — with its own parameter bar, refresh, export and server switcher.

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02 Quick start — your first report

Blank canvas to a saved chart in a few minutes.

1. In the Builder, click a widget in the **Add widget** rail (start with **Bar** or **Table**). It appears on the canvas.
2. Click the widget's **gear** icon to open **Widget properties** on the right.
3. Pick a **Connection** and type your **SQL query**. Use **Expand** for a large editor.
4. Click **Run**, then choose the **Label column** (X axis / row labels) and one or more **Value columns** (the numbers), and press **Apply**.
5. Drag to position, drag edges to resize.
6. Click the title to rename the report, pick a **folder**, then **Save**.
7. Press **View report** to see the audience's view.



The builder: widget rail on the left, canvas in the middle, properties on the right.

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03 Connections

Where the data comes from.

A connection points at one database server. SQL Planner connects to **SQL Server, PostgreSQL, MySQL, MariaDB, Percona, Amazon Aurora (MySQL and PostgreSQL), Amazon Redshift and Oracle**. Open **Menu › Data › Connections** to add, edit or test them. Each widget chooses a connection in its properties, and its query runs against that

server. The same list powers the **Run against** switcher, so a report can be pointed at other servers later.

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04 Widgets & chart types

Pick the shape that fits the question.

TYPE	BEST FOR
Bar / Line / Area	Comparing or trending values across a category or time.
Pie / Doughnut / Polar / Radar	Parts of a whole, or multi-axis comparisons.
Scatter	The relationship between two numeric columns.
Table	Row-level detail with conditional formatting.
Matrix	Rows × columns of aggregated values — see section 8.
KPI	One big headline number.
Separator	A titled divider to group the canvas visually.

Switch a widget's type any time from the **Chart type** dropdown — the same query re-draws in the new shape.

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05 Queries & parameters

Plain SQL, with filters your viewers control.

Type SQL in the widget's **SQL query** box, or click **Expand** for a full-screen editor. Return the columns you want to plot, and reference a parameter with `@Name`:

```
SELECT Category, SUM(Amount) AS Total
FROM Sales
WHERE Region IN (@Region)      -- multi-value parameter
  AND OrderDate >= @FromDate    -- single-value parameter
GROUP BY Category
ORDER BY Total DESC;
```

> **Multi-value rule.** Always write `IN (@Name)`, never `= @Name`, for a multi-select parameter. The list is expanded to the right number of values automatically.

Defining parameters

Open **Data › Parameters**. Each parameter has a name (used as `@Name`), a type, and optionally a **lookup query** that fills its dropdown from the database. Turn on **Allow multiple** for a checkbox picker. Viewers change parameters and press **Apply**; every widget re-runs.

> **Editing SQL?** After using the Expand editor's **Use this SQL**, press **Run** or **Save** — saving now commits the open panel automatically, so your change is kept.

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06 Shared datasets

Write a query once, reuse it everywhere.

Open **Data › Datasets** to save a named query against a connection. In a widget's properties, switch **Data source** from *Inline SQL* to a dataset. Update the dataset once and every widget that uses it follows.

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07 Filter, sort & cross-filter

Shape the data after it's fetched — no SQL changes needed.

In a widget's properties, open **Filter / Sort / Top N** to keep matching rows, order the result, or show just the top N. Use the widget's **Settings** for calculated fields and conditional formatting.

Cross-filtering: click a bar, slice or point in one chart and the other widgets filter to that value. A chip shows the active cross-filter — clear it, or just **Refresh**, to reset.

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08 Pivot matrix

Turn flat rows into a rows-by-columns grid of aggregates.

Choose the **Matrix** type, then set the **Matrix layout**:

- **Row group(s)** — one or more columns down the left (nested grouping).
- **Column headers** — a column whose distinct values become the columns across the top; leave as *(none)* for a simple grouped total.
- **Value column** and **Aggregation** — Sum, Count, Average, Min or Max.

Example — rows `server_name`, columns `schedule_name`, value `duration`, aggregation Sum: servers down the side, schedules across the top, summed durations in the grid.

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09 Report settings

Appearance and limits for the whole report.

Open **Report › Settings** to set the subtitle, title alignment / size / color, a theme, header and footer text and rules, PDF orientation, and the **Maximum rows per widget**.

> **Maximum rows.** Each widget fetches up to this many rows when the report runs (default 5,000). Raise it for a report whose table needs more; higher values mean slower loads.

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10 Folders & permissions

Organize reports, and decide who can do what with them.

Open **Data › Folders & Permissions**. Reports live in folders (everything starts in **Home**). Move a report between folders from the title-bar picker, the row menu in **Open**, or the report browser.

Permissions (admins)

Click **Permissions** on a folder to open the user grid. For each user, tick any of:

RIGHT	GRANTS
View	See and open the reports in that folder.
Create	Make new reports in the folder (and move reports into it).
Write	Edit and save the reports in the folder.

RIGHT	GRANTS
Delete	Delete reports in the folder.

Changes save instantly. **Admins** always have full access; a report's **owner** always keeps full control of their own reports.

11 Sharing a report

A link anyone can open — no sign-in, no folder access needed.

Open **Report › Share** to create a link, optionally with an expiry or passcode. Anyone with the link sees a read-only view of that one report. Share links are independent of folders, so moving a report never breaks its links. Because a link is a deliberate "anyone with the link can view" grant, only people who can edit a report can create one. Review and revoke your links from the **Shared links** list on the report browser.

12 Email subscriptions

Send a report to inboxes on a schedule.

Open **Report › Subscribe** to schedule delivery — recipients, a format and a cadence. The report runs on schedule and is emailed out, so people get the numbers without opening the app.

13 Run against a server

One report, any server — ideal for health checks across environments.

Use the **Run against** dropdown on the title bar (and in the viewer). Pick a connection and every widget runs its same SQL against that server instead of its saved one. It's a temporary override — the saved report never changes — so you can point a "database health" report at each server in turn. Choose *original* to go back.

14 Copy a report as a template

Start from an existing report, or move one between servers.

Open **Data › Template** for three options:

- **Duplicate** — an instant copy of this report (widgets, parameters, layout) in the same folder.
- **Export as JSON** — copy the report's whole definition as text you can keep or paste elsewhere.
- **Import as new report** — paste an exported JSON to build a brand-new report from it, even on another instance.

Every duplicate or import creates fresh records — nothing overwrites the original. You need view rights to export or duplicate, and create rights in the target folder to import.

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15 Usage analytics

See what's being used, and by whom.

Open **Data › Usage** for the most-viewed reports and most active users over a period. Filter by a specific report or user, and click any row to drill in.

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16 Viewing & exporting

The read-only experience your audience gets.

The **Viewer** shows the report with its parameter bar, a **Refresh** button, the **Run against** switcher, and **Export** to Excel, CSV, PDF or PNG. Interactions like cross-filtering work here too. Press **View report** in the builder to open it.

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17 Tips & troubleshooting

IF…	THEN…
A table or matrix shows fewer values than the chart	Check the parameter is written as `IN (@Name)`, and clear any active cross-filter (Refresh resets it).
A table is capped at 5,000 rows	Raise **Maximum rows per widget** in **Report › Settings**.

IF…	THEN…
A SQL edit didn't stick	After **Use this SQL**, press **Run** or **Save** — Save commits the open panel automatically.
You can't see a report someone mentioned	Ask an admin for **View** on that report's folder, or request a share link.
A share link says "not valid"	It may have expired or been revoked — create a fresh one from **Share**.