

Tips & Tricks

A step by step guide to boost your BI skills

• TIP 1

• TIP 2

Value / Percentage Switching on a Grid or Chart Report Members as List Filter

TIP 1

Value / Percentage Switching on a Grid or Chart

When you want to be able to switch or display different values on a grid, or chart, like the base value AND also it's % value of the total, it can be done using several techniques in Discover, without the need for any complex coding or calculation.

In this example, we will use a sales metric, and find the % of total value for this metric. Starting report:

Sales by Occupation						
Occupation	Sales					
Clerical	4,087,305.60					
Management	4,112,783.64					
Manual	2,976,234.26					
Professional	6,522,371.50					
Skilled Manual	5,569,547.45					

Using the right click context menu, right click on the Sales header and choose % of total following the click path below. Notice all the different nocode calculations you can incorporate besides % of total.

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Sales by Occup	ation								
Occupation	Sales			í i					
Clerical	4,087,30	Swap	1						
Management	4,112,783	Add	•						
Manual	2,976,234	Dice	×						
Professional	6,522,37	Member Selection							
Skilled Manual	5,569,541								
	+	🗲 Quick Calc	•		Create Measure	×	fx Math Functions	×	
	P2	↓ Quick Sort	÷	E	Create List	×	Difference Functions	•	
	5	Quick Filter	×		Categorize	•	L Cumulative Functions	•	Cumulative Totals
	1	7 Pivot	1	@	Quick Parameter	1	L Statistical Functions	e I	Percent Of Maximum
		Actions		-			Advanced Functions	•	Percent Of Total
			1	1.3	QUICK KFI	-	∑ Aggregate	•	Rolling Average
	2	Start New Conversation				1		1	Pareto
		Conditional Formatting	×					-	

The newly created measure will be added on the grid:

Occupation	Sales	% Total Sales
Clerical	4,087,305.60	17.57%
Management	4,112,783.64	17.68%
Manual	2,976,234.26	12.79%
Professional	6,522,371.50	28.03%
Skilled Manual	5,569,547,45	23.94%



Using conditional

formatting, you can add % of total as an indicator, in the same cell as the sales metric

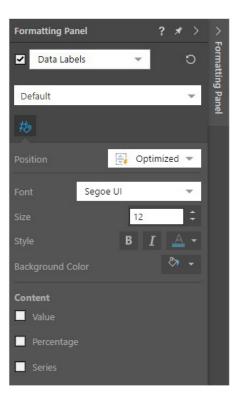
Occupation	Sales		Swap	•					
Clerical	4,087,305		-	1					
Management	4,112,783		Add	1					
Manual	2,976,234	11	Dice						
Professional	6,522,37	•	Member Selection	×					
Skilled Manual	5,569,547			-					
		±•	Quick Calc	1					
		²↓	Quick Sort						
		7	Quick Filter						
		0	Pivot						
		R	Actions	•					
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					1 <mark>2</mark> 3	Foreground Colors			
						Shapes	•		
					E	Data Bars	•		
					% _#	Values	÷	%	Percent Of Total
								%	Percent Of Maximum

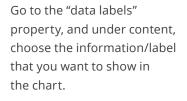
The % of total measure is then added as an indicator on the grid, in sales column

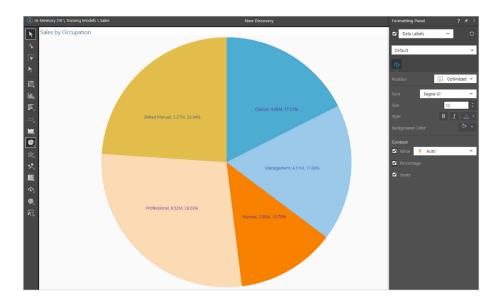
Drop	Zones	? <	(i) In-	Memory DB \ Trainin	g Models	\ Sales	
	Columns			Sales, % Total S	ales by	Occupation	
				Occupation	Sales		% Total Sales
	Values	×	+⊾	Clerical	17.6%	4,087,305.60	17.57%
			- E 🖓	Management	17.7%	4,112,783.64	17.68%
	Rows	:		Manual	12.8%	2,976,234.26	12.79%
				Professional	28.0%	6,522,371.50	28.03%
	Occupation	×	iII,	Skilled Manual	23.9%	5,569,547.45	23.94%
000	Values		litt <u>r</u>				
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	Sales	×					
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Using Formatting Panel with a pie chart. Start a brand new pie chart report. Open Formatting Panel from the right side of the canvas.







TIP 2

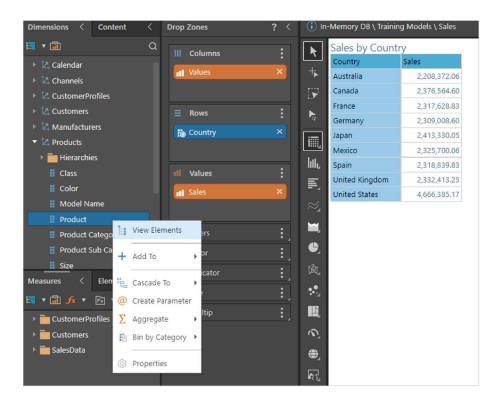
Report Members as List Filter

Did you know that you can use members/elements of a dimension that you can built a list out of, and then use as a filter within your Discover report? In this scenario, you want to be able to filter a sales report by country, using a list of specific products you are tracking.

Start with this report:

Sales by Country					
Country	Sales				
Australia	2,208,372.06				
Canada	2,376,564.60				
France	2,317,628.83				
Germany	2,309,008.60				
Japan	2,413,330.05				
Mexico	2,325,700.06				
Spain	2,318,839.83				
United Kingdom	2,332,413.25				
United States	4,666,385.17				

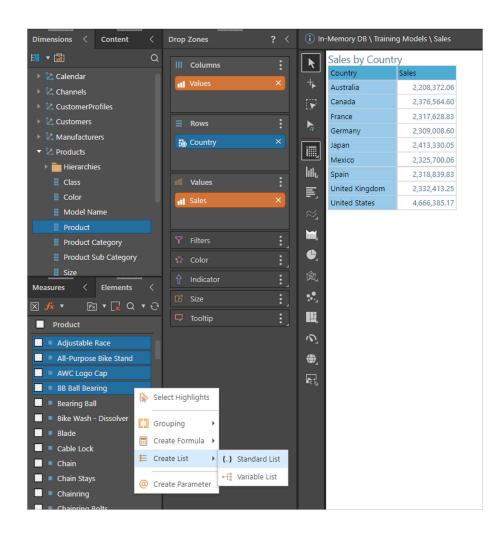
Find the dimension whose elements you want to use as a filter. Right click > View Elements



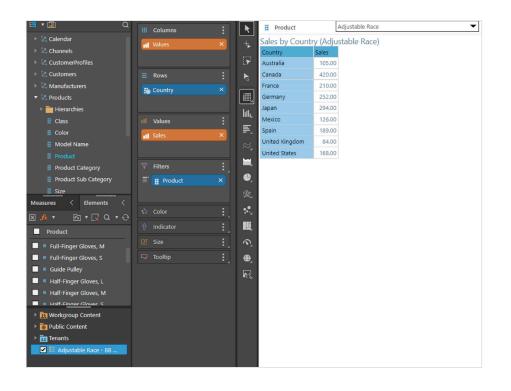
2

In the elements window, CTRL + CLICK to select the elements you want to use as a filter for the report > right click

> create list > standard list



It then creates a list which you can then use to filter the report. Simply select the checkbox, and see the list appear as a filter for the report.



Use list to filter report. From here, you can also modify the slicer settings to change the filter type (default is drop down)

(i) In-	Memory DB \ Trainin	g Models	\ Sales						
R	Product		WC Logo Cap 👻						
+	Sales by Countr	y (AW(Search X						
	Country	Sales	Adjustable Race						
E 🖌	Australia	10,34	All-Purpose Bike Stand						
N,	Canada	11,11	AWC Logo Cap						
	France	11,56	BB Ball Bearing						
i III.	Germany	6,52	9.25						
hilly	Japan	10,51	5.87						
	Mexico	14,05	3.18						
E,	Spain	10,81	5.81						
\approx	United Kingdom	10,19	2.51						
	United States	22,66	2.59						

Modify slicer settings

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k	Product	AWC Log	Cap 👻				Formatting Panel
	Sales by Countr	ry (AWC Logo	Cap)		10	3 Settings	tting
+	Country	Sales				Format	Pan
	Australia	10,347.24			-		<u>e</u>
N	Canada	11,112.16			×	Remove	
	France	11,565.06					1
×	Germany	6,529.25					
hili,	Japan	10,515.87					
	Mexico	14,053.18					
E,	Spain	10,815.81					
\sim	United Kingdom	10,192.51					
~_	United States	22,662.59					
≈ 1							
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