PYRAMID
ANALYTICS

Tips and Tricks

A step by step guide to boost your BI skills

TIP #1

Present – Scrollable Panel

A new scrollable panel layout container for dashboards has been added, allowing designers to build content that scrolls off the screen, side by side with fixed position content. The new layout option expands the ways content can be laid out and displayed to end-users. It allows designers to make better use of slide real estate by allowing content to scroll off-screen while still allowing other elements to remain statically positioned on screen.
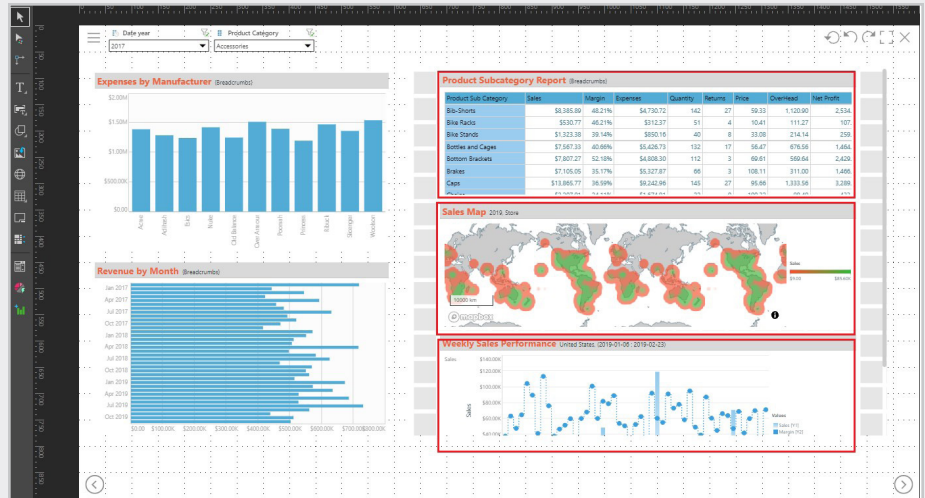
(1)   In the following slide we will add a scrollable panel with three reports
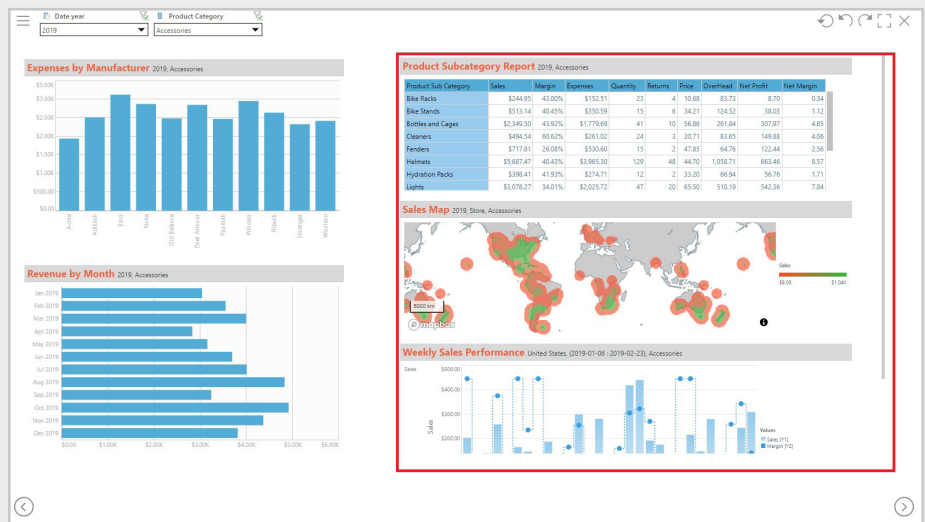
(2)   Add the scrollable panel, right to the existing content
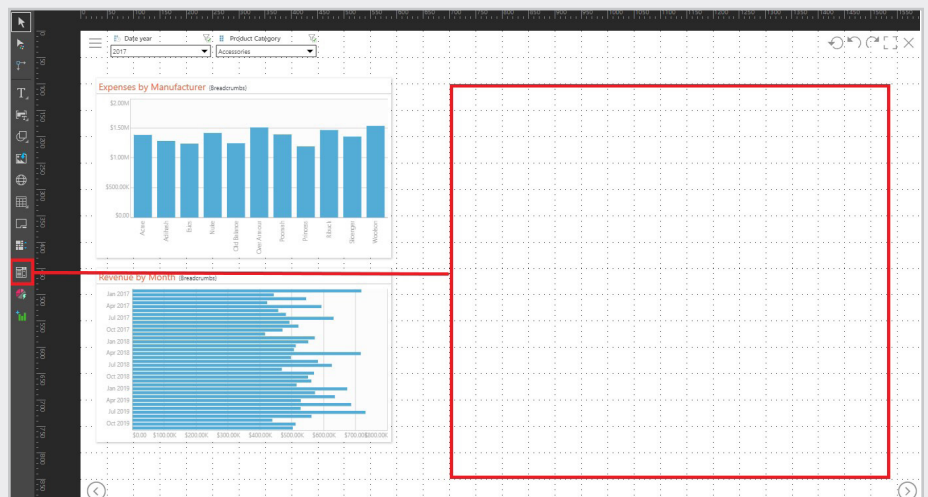
3 From the content explorer we will add a few reports within our scrollable panel (place report objects right on top of the scrollable panel)

4 Now, when we run the dashboard, we can see how we can scroll the reports inside the scrollable panel, without the scroll affecting the two other reports
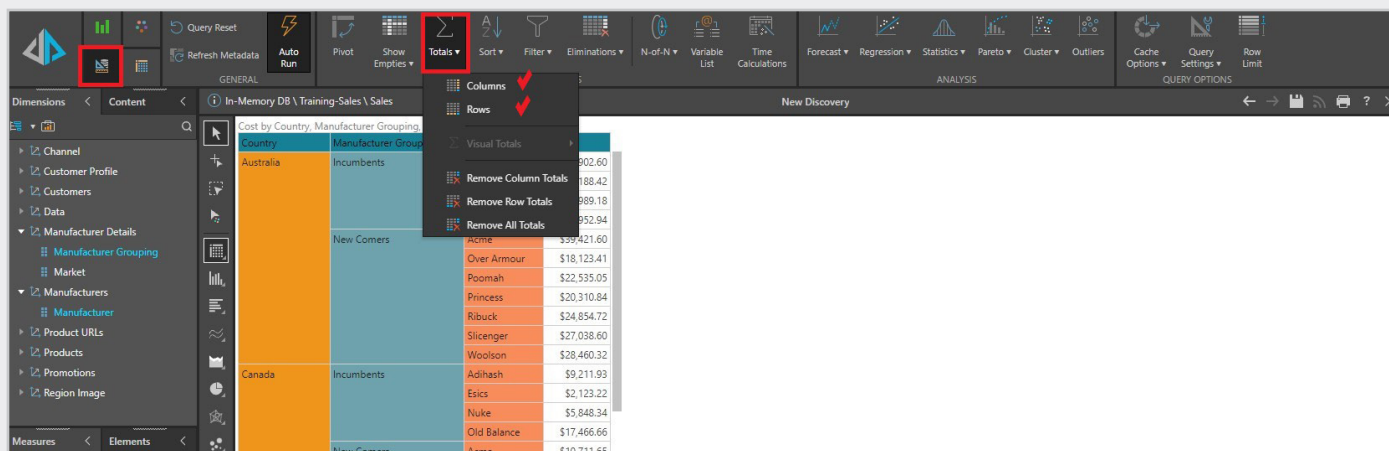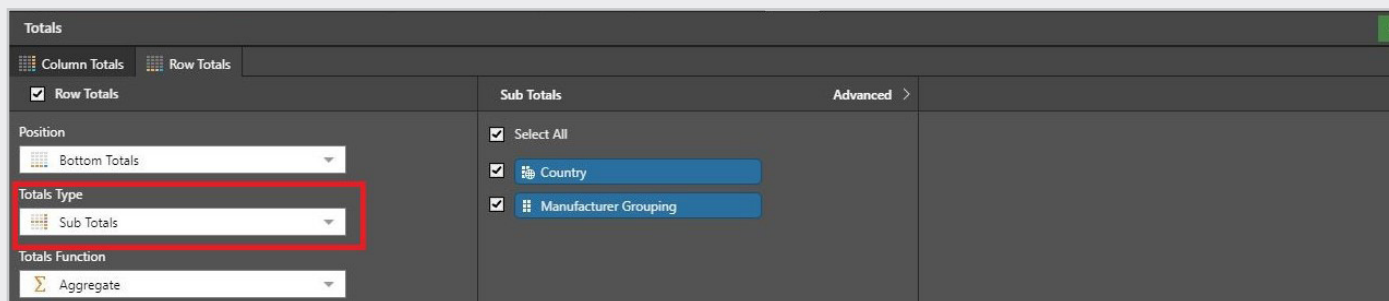
Customizable Sub-Totals

Users can now select or deselect which attributes will be used in Sub-Totals. The ability to hide and show specific Sub-Totals increases the usability of grids by removing unneeded graphical clutter.

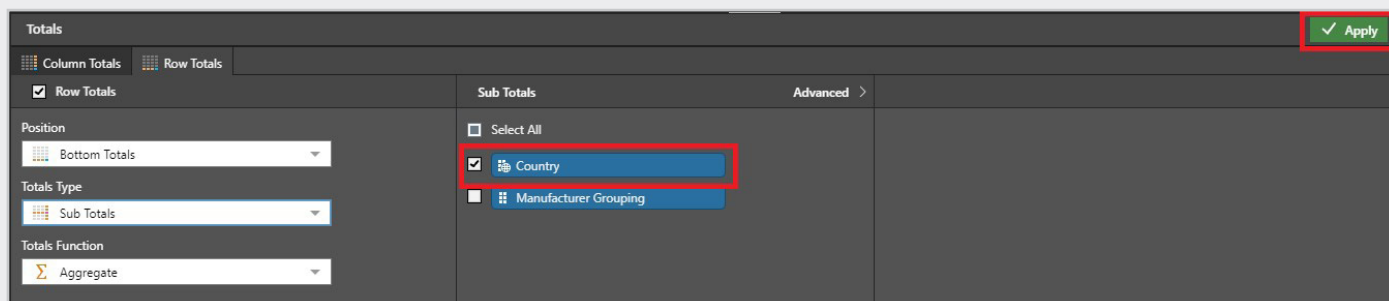**①** In Discover, in an existing grid report, go to the query menu, and select total. Pick either row or column for sub totals. For this example, pick Row totals

② In the Total's Wizard, you will be able to customize which hierarchy you can apply the subtotals. Under Totals Type, pick sub totals

③ Under Sub Totals, pick the hierarchy, in this case country, click Apply
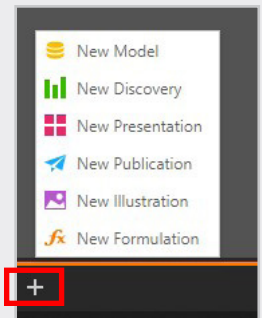
④ Now your customized sub-total shows in the grid for only the hierarchy you chose

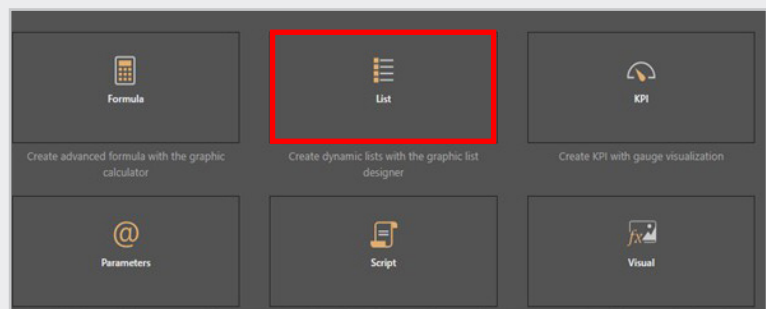| Country	Manufacturer Grouping	Manufacturer	All
Australia	Incumbents	Adihash	$53,902.60
		Esics	$34,188.42
		Nuke	$23,989.18
		Old Balance	$33,952.94
	New Comers	Acme	$39,421.60
		Over Armour	$18,123.41
		Poomah	$22,535.05
		Princess	$20,310.84
		Ribuck	$24,854.72
		Slicenger	$27,038.60
		Woolson	$28,460.32
	Australia Sub Totals		$326,777.68
Canada	Incumbents	Adihash	$9,211.93
		Esics	$2,123.22
		Nuke	$5,848.34
		Old Balance	$17,466.66
	New Comers	Acme	$10,711.65
		Over Armour	$9,804.41
		Poomah	$6,585.91
		Princess	$10,576.20
		Ribuck	$1,021.04

Create a Custom Sorted List for Use in Filtering

Have you ever noticed that when you are using a filter, the order in which elements contained within your filter are in alphabetical order? Have you ever had a need to use a field as a filter that contains numeric numbers or several elements but want to have them in a custom sorted order? If so, using custom sorted lists can help you in both cases.
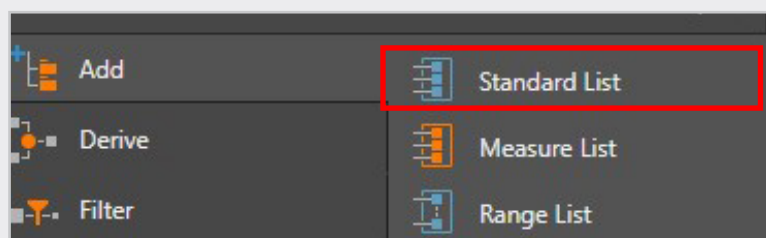
New Model
New Discovery
New Presentation
New Publication
New Illustration
New Formulation
+

① Click the + sign in Pyramid to bring up the Menu

② Click New Formulation and choose list

③ Choose the Data Source you want to use

Formula
Create advanced formula with the graphic calculator

List
Create dynamic lists with the graphic list designer

KPI
Create KPI with gauge visualization

Parameters

Script

Visual

④ Under Add, Choose Standard List

Add
Derive
Filter

Standard List
Measure List
Range List

(5) Drag Standard List into the Formulate Pane
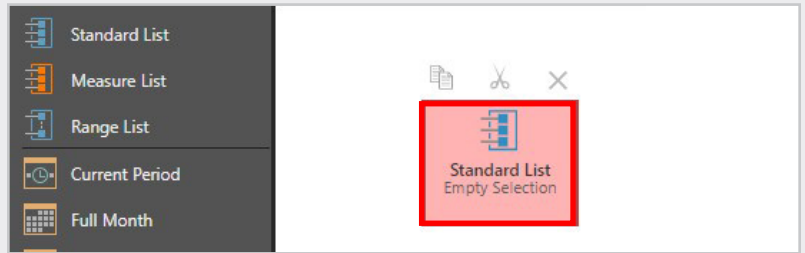
(6) Click Sort, Click on Order by Selection and Drag out to Formulate Pane

(7) Click on the Pink Highlighted Standard List and Select the members you want in your list and the elements to be included. Pay attention to the order in which you select the elements as this will be the order they show up in your custom list
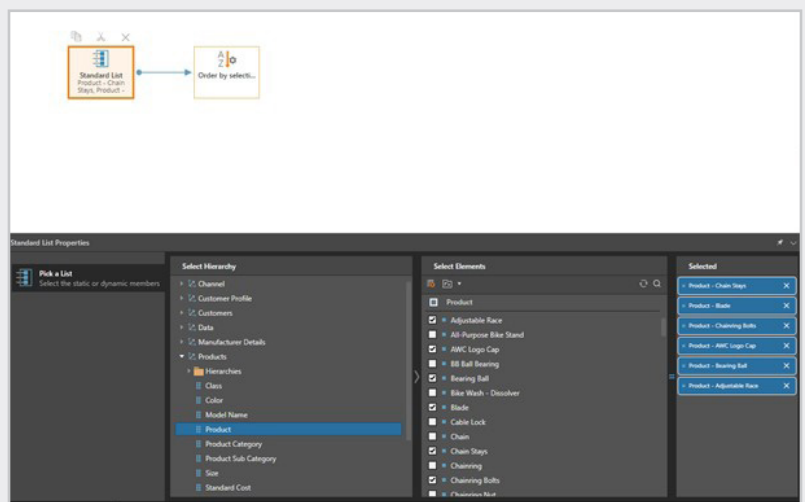
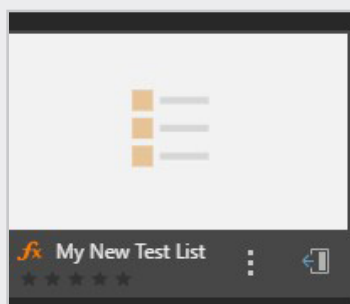(8) Click Save in upper right hand corner

(9) Name your list and choose where you would like it stored

(10) Go To Content Explorer and you will see your new list

You can now use the list as a filter in your Discover reports

Persisting Visualization Colors

Pyramid's "member color lock" feature ensures colors for the targeted items are persistent and do not change even if members are removed or slicing is performed.

1 In this sample dashboard, Australia appears in the Revenue column chart but has been removed from the Expenses column chart. For the chart on the right, the standard colors have been re-assigned, and we end up with the same countries having two different colors.

2 By simply selecting the member color lock button from the Design ribbon within Discover, the colors for the visuals are locked
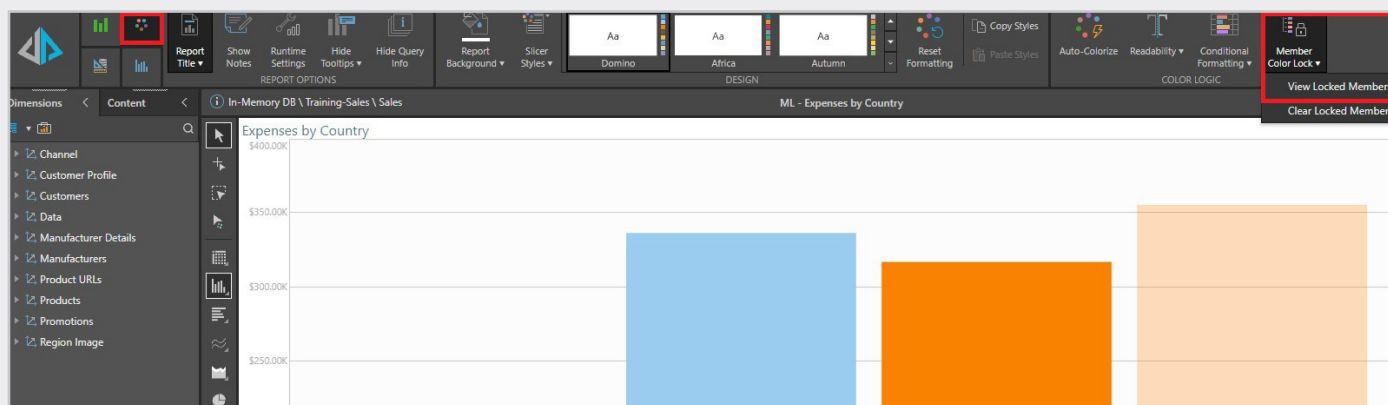
(3) After locking the colors, the same colors persist even after eliminating members

The use of specific colors helps users to immediately identify hierarchies, measures, and members in a visualization. After performing slicing or dicing, assigned colors can change, creating confusion.

Pyramid's one-click persistent color feature maintains the same color in all visualizations, providing users with consistent and intuitive visualizations.

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