pyramid

Tips & Tricks

A step by step guide to boost your BI skills

● **TIP 1**

Copy Content
(version 2020.26)

● **TIP 2**

Using Filters in
Present to Improve
Performance

TIP 1

Copy Content (version 2020.26)

Aside from the ability to export data from Discover, there is also an ability to be able to copy data from report to spreadsheet, to share either raw data or the visual that comes from Pyramid.

1 Start with a simple matrix report in Discover. To copy content, right click on the canvas, right outside of the grid.


2 To copy the raw data that drives the visual, select copy raw data
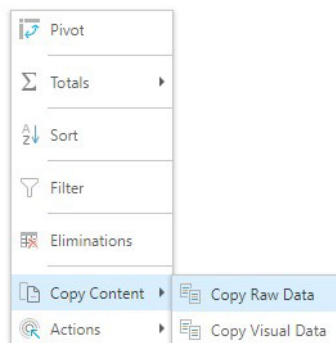
3 Copy this into a spreadsheet outside of Pyramid and you will get the raw data behind the visual

	Territory	Role	Count
1	Territory	Role	Count
2	NA	Alliances	951
3	Strategic Alliances	Alliances	1,305.00
4	DACH	BDR	1,624.00
5	NA	BDR	7,441.00
6	UK	BDR	16,086.00
7	NA	CS	761
8	UK	CS	5,324.00
9	NA	Marketing	193
10	UK	Marketing	16
11	NA	Operations	21
12	UK	Operations	229
13	MEA	Presales	787
14	NA	Presales	1,244.00
15	UK	Presales	464
16	DACH	Sales	206
17	IL	Sales	839
18	MEA	Sales	464
19	NA	Sales	11,481.00
20	UK	Sales	2,829.00
21			

4 If you want to copy the visual as seen in Discover, with the grid formatting/grouping, simply right click on the canvas > Copy Content > Copy Visual Data
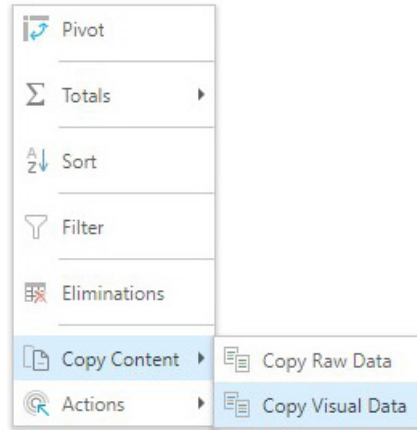
5 Copy into spreadsheet and you will get the same matrix grid structure as you see it in Discover.

| A	B	C	D	E	F	G
Count						
Role	DACH	IL	MEA	NA	Strategic Alliances	UK
Alliances				951	1,305.00	
BDR	1,624.00			7,441.00		16,086.00
CS				761		5,324.00
Marketing				193		16
Operations				21		229
Presales			787	1,244.00		464
Sales	206	839	464	11,481.00		2,829.00

Using Filters in Present to Improve Performance

There are times that we need to be able to provide a vast amount of data as a framework that multiple users, with different requirements, need to be able to use. We do this by making tons of data available within dashboards, and be able to filter the data so end-users can get exactly what they need with more flexibility using filters.

However, each time a filter is used, a query runs behind the scenes to filter the report—and when we're working with many filters, filtering a large dataset, this can yield less than optimal dashboard performance as it may require to run multiple queries at a time to get the final result set. To improve performance, we can resolve this by creating a separate page containing filters, that then runs the main dashboard page containing data, after filters have been picked.

1 Create a new present dashboard with 2 slides. Name them Filter Slide and Content Slide.

2 Turn off Navigation Options. This will ensure that filter selections are made first before running the dashboard. Go to the Content Master Page by clicking on "Content" within the slide panel. Within here, go to navigation options in the present ribbon at the top. Go to Navigation Options > None.
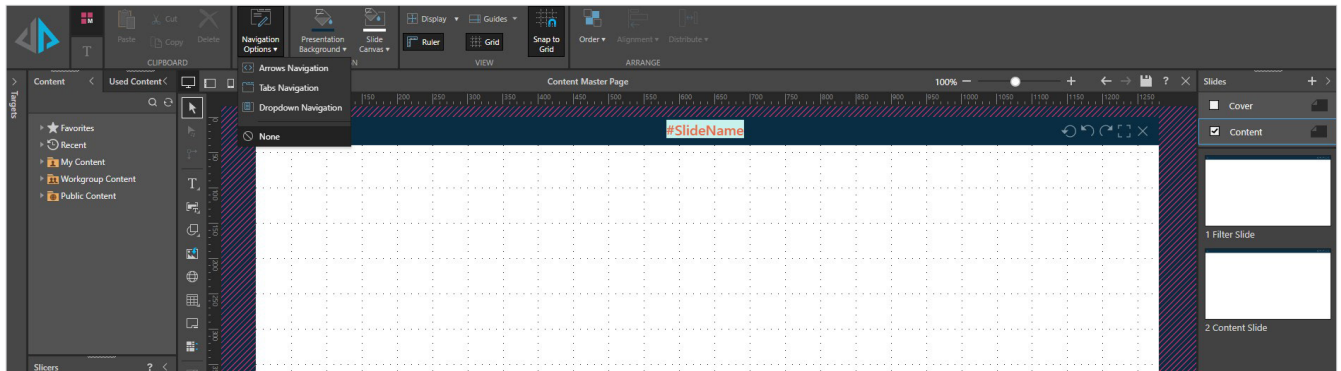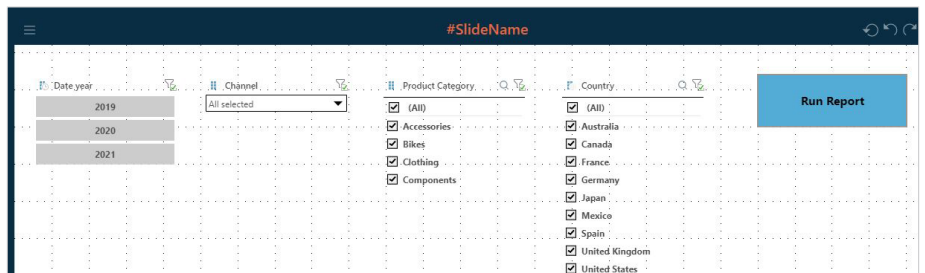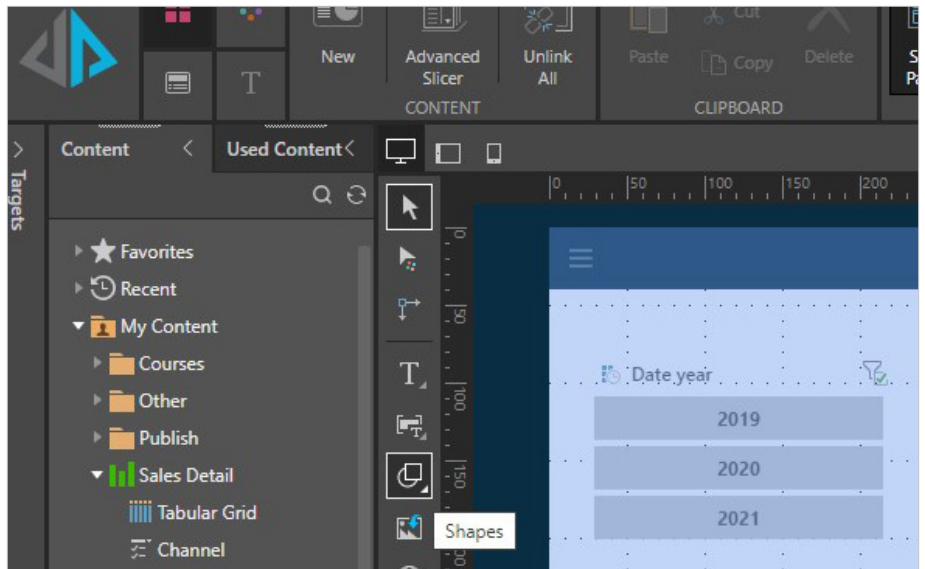

3 Build your Filter Slide. Add all the filters to the canvas by using either drag and drop from content panel or using "add slicer" from the canvas menu.
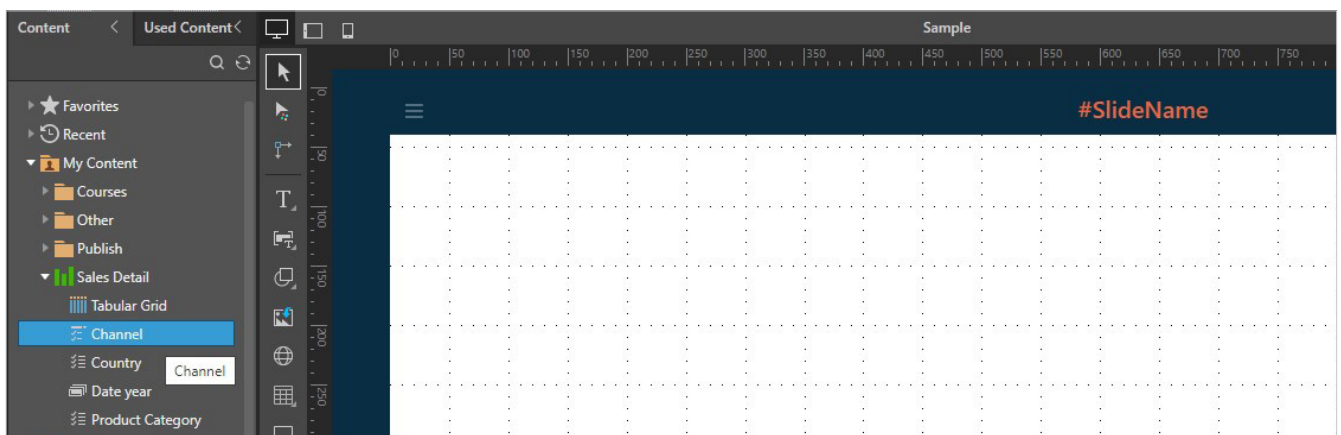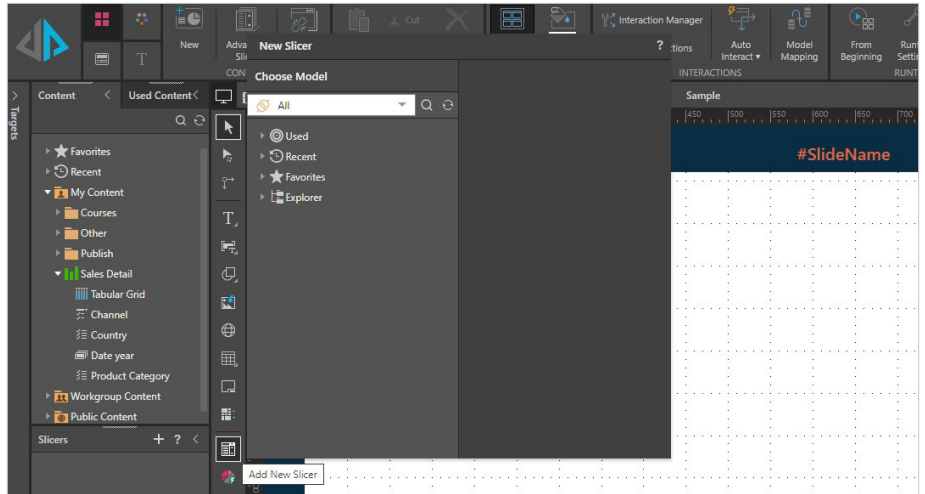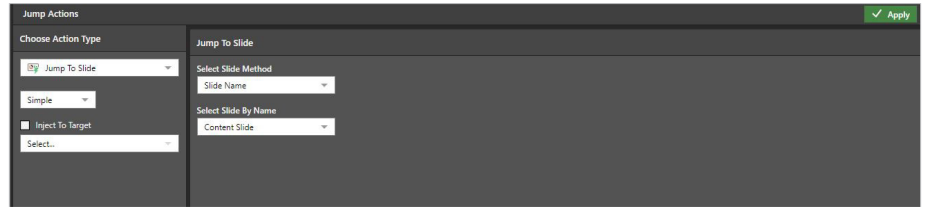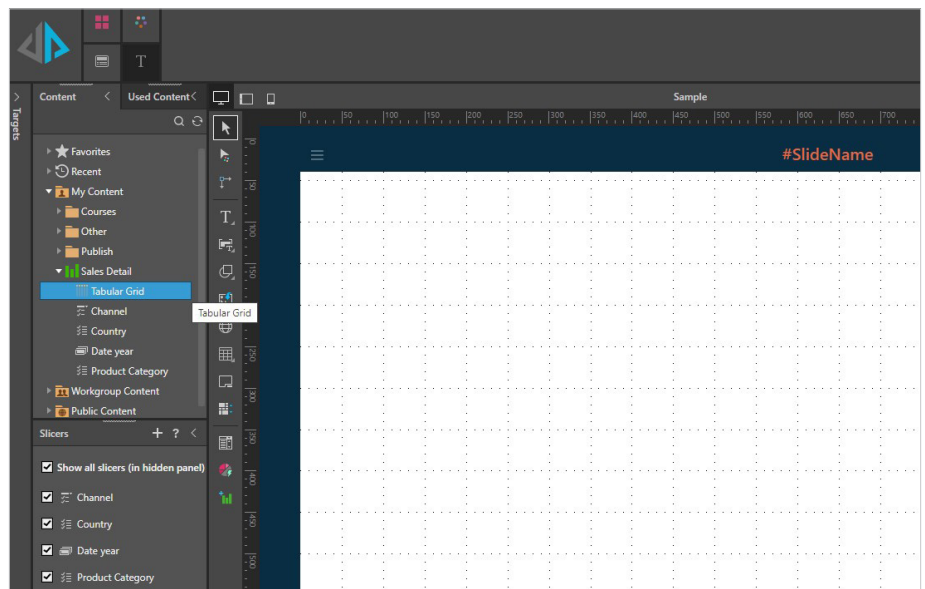
4 Create a button on the filters page that will open the Dashboard Detail Slide with the results after applying the filters. Do this by using the "shapes" button on the canvas and adding a text.

Add an action to the button, that when a user clicks, it then goes to the slide with the report details in the dashboard. Right click on button > Click Action, which shows the Jump Actions Panel below. Select Jump to Slide > Content Slide (created in step 1) > Apply
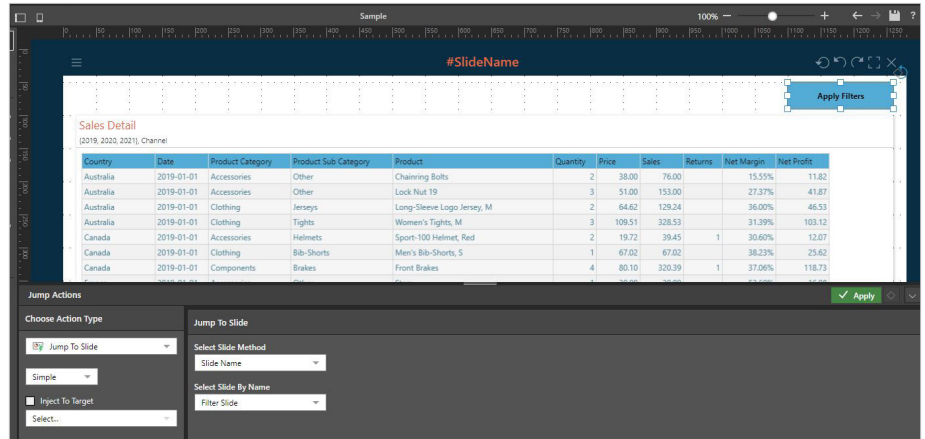

5 Add Discover object with your detail report in your Content Slide from the Content Panel.

6   Add "return to filter" button in Content Slide, that will point back to the Filters slide. Follow steps in step 4.

7   Add the interaction between slicers and report object in Content Slide. Go to Present Tab > Interaction Manager. Within Interaction Manger, select "hidden slicers" at the top right of the wizard. Define the interaction between slicers and the report object.
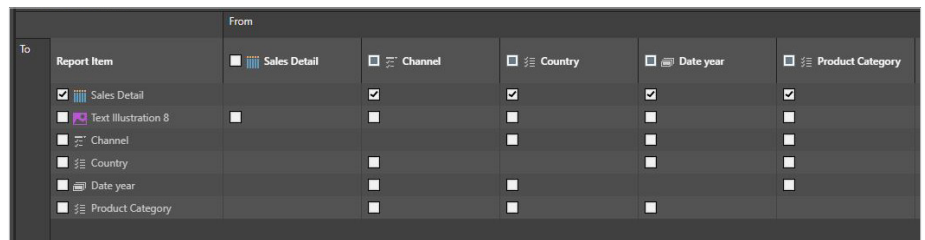
8   Run the dashboard starting with filters page. Choose your filters and click the "Run Report Button", which will then open the content slide with your report.