

# Tips & Tricks

A step by step guide to boost your BI skills

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TIP 1

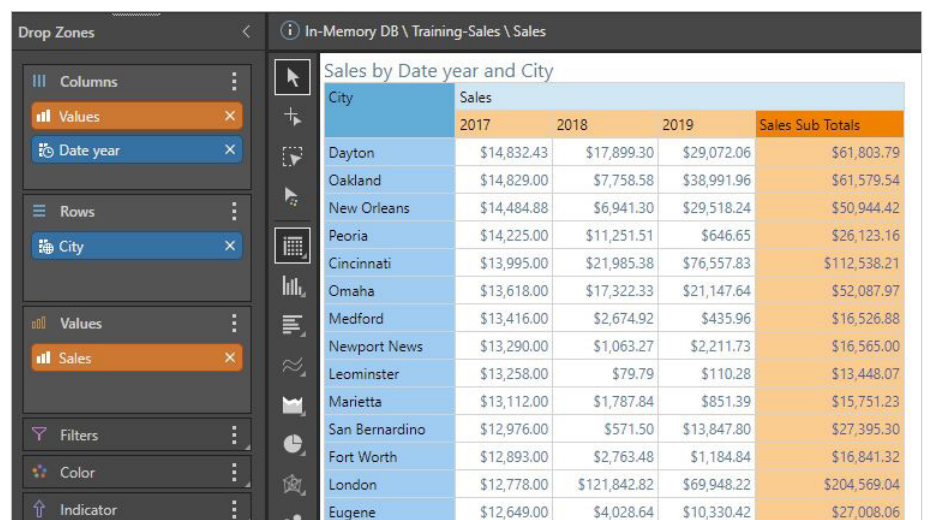
## Report Personalization

Pyramid lets users customize and personalize the labels of value metrics and hierarchies for a given data model. These customizations can be set for all sessions (present and future) or to a specific report without affecting other users; breaking the functionality of the underlying data model; or compromising the enterprise-wide governance and security features required by administrators.

By definition, self-service analytics is about letting users work creatively with data to produce their own data discoveries and visualizations and ultimately drive better decisions. The self-service component means changing queries, calculations, visualizations, and anything else needed to deliver useful information.

Example

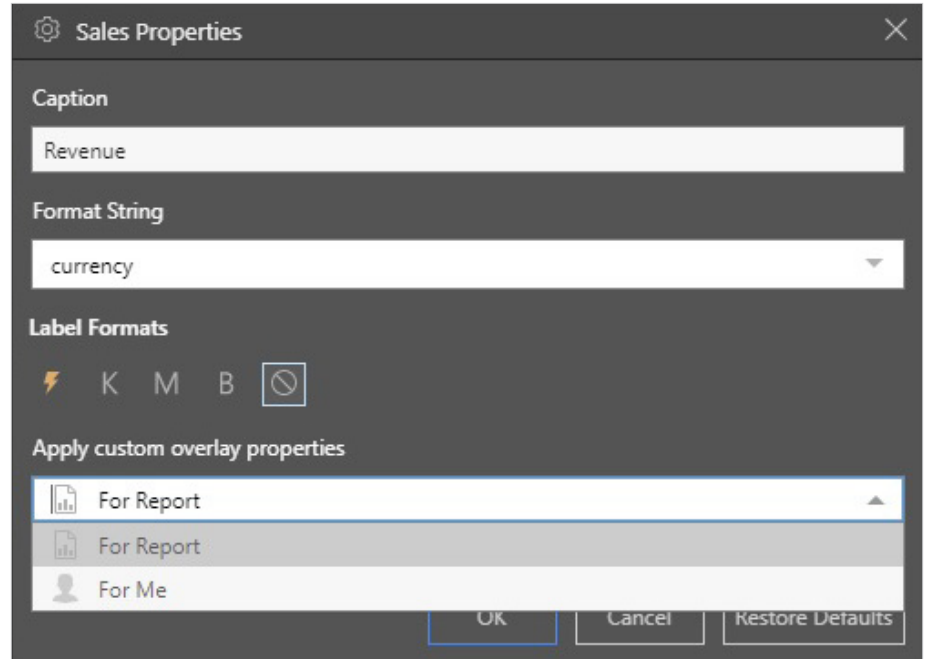
The user of this report wants to use the term "Revenue" instead of "Sales". In addition, the user wants to use the term "Branch" instead of "City" and wants to replace "dates year" with the title "Year". The amounts must be displayed in the thousands format (K), rounding to the closest thousand.



The screenshot shows a BI report interface. On the left is a configuration sidebar with sections: Columns (Values, Date year), Rows (City), Values (Sales), Filters, Color, and Indicator. The main area displays a table titled "Sales by Date year and City" with columns for City, 2017, 2018, 2019, and Sales Sub Totals. The data is as follows:

City	2017	2018	2019	Sales Sub Totals
Dayton	\$14,832.43	\$17,899.30	\$29,072.06	\$61,803.79
Oakland	\$14,829.00	\$7,758.58	\$38,991.96	\$61,579.54
New Orleans	\$14,484.88	\$6,941.30	\$29,518.24	\$50,944.42
Peoria	\$14,225.00	\$11,251.51	\$646.65	\$26,123.16
Cincinnati	\$13,995.00	\$21,985.38	\$76,557.83	\$112,538.21
Omaha	\$13,618.00	\$17,322.33	\$21,147.64	\$52,087.97
Medford	\$13,416.00	\$2,674.92	\$435.96	\$16,526.88
Newport News	\$13,290.00	\$1,063.27	\$2,211.73	\$16,565.00
Leominster	\$13,258.00	\$79.79	\$110.28	\$13,448.07
Marietta	\$13,112.00	\$1,787.84	\$851.39	\$15,751.23
San Bernardino	\$12,976.00	\$571.50	\$13,847.80	\$27,395.30
Fort Worth	\$12,893.00	\$2,763.48	\$1,184.84	\$16,841.32
London	\$12,778.00	\$121,842.82	\$69,948.22	\$204,569.04
Eugene	\$12,649.00	\$4,028.64	\$10,330.42	\$27,008.06

- By right clicking on the sales chip, the user can adjust the caption, the format string, and the label format. The user can also choose to apply these changes for this report only, for all of their subsequent reports, or for all roles that an administrator user has the security authorization to apply this for.



- After applying the changes, we can see how the captions have been adjusted on the chips, in the report, and even in the title of the report. The numbers have also been adjusted to display the "K" format. Any other user will not see these changes, as the user specified that these overlays will only be applied "For Me".

Pyramid has retained a single definition for this report, retaining governance and shareability, while providing the flexibility to customize the report per user.

City	2017	2018	2019	Revenue Sub Totals
Dayton	14,832.43	17,899.30	29,072.06	61,803.79
Oakland	14,829.00	7,758.58	38,991.96	61,579.54
New Orleans	14,484.88	6,941.30	29,518.24	50,944.42
Peoria	14,225.00	11,251.51	646.65	26,123.16
Cincinnati	13,995.00	21,985.38	76,557.83	112,538.21
Omaha	13,618.00	17,322.33	21,147.64	52,087.97
Medford	13,416.00	2,674.92	435.96	16,526.88
Newport News	13,290.00	1,063.27	2,211.73	16,565.00
Leominster	13,258.00	79.79	110.28	13,448.07
Marietta	13,112.00	1,787.84	851.39	15,751.23
San Bernardino	12,976.00	571.50	13,847.80	27,395.30
Fort Worth	12,893.00	2,763.48	1,184.84	16,841.32
London	12,778.00	121,842.82	69,948.22	204,569.04
Eugene	12,649.00	4,028.64	10,330.42	27,008.06
Parsippany	12,342.00	8,018.70	108.19	20,468.89
Dallas	12,290.96	31,960.74	34,005.37	78,257.06
Las Vegas	12,148.57	12,945.46	35,155.00	60,249.03
Aurora	11,874.00	3,171.41	44,074.89	59,120.30
Sylvania	11,846.00	3,909.40	9,249.85	25,005.25
Shawnee	11,745.00	22,968.40	2,093.59	36,806.99
Savannah	11,398.00	1,566.64	10,678.86	23,643.50

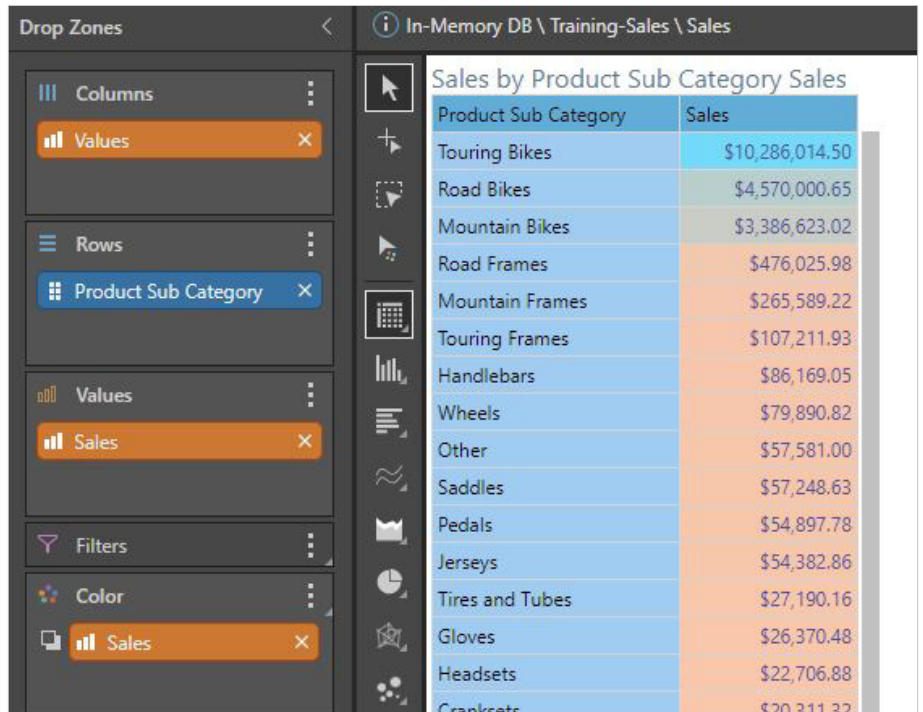
TIP 2

# Advanced Conditional Formatting

By default, when adding the color field to the drop zone Pyramid applies a linear continuous dual banded format to the values. If you have outliers in the data this may not produce the desired coloring result. To apply a non-linear format to the data apply this trick using an optional parameter and a formula to extend the conditional formatting capabilities.

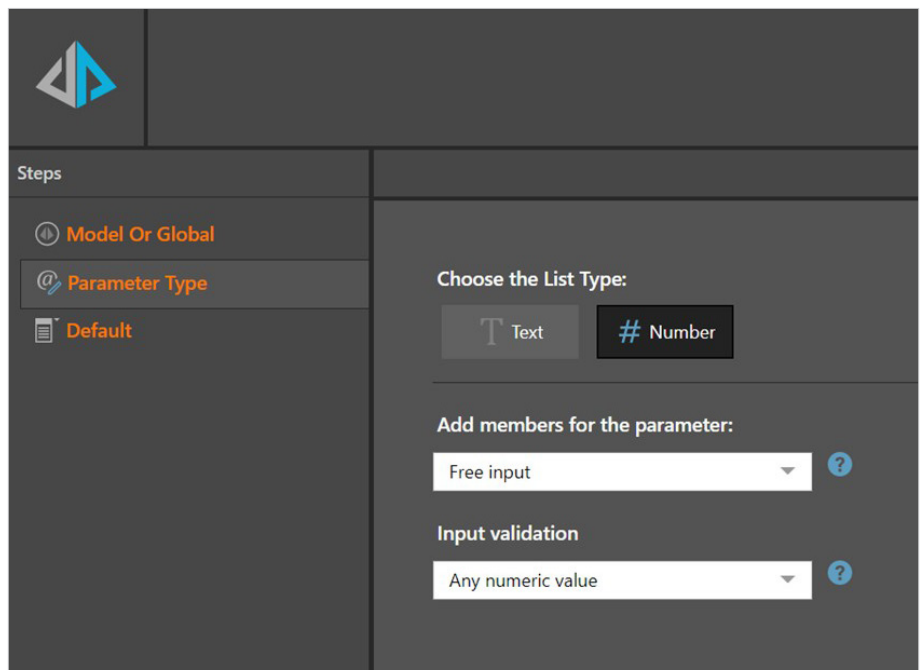
- 1 Open a grid report in Discover and add the value field to the color drop zone.

In the example right the dataset includes a number of outliers to the sales data and the conditional formatting is not evenly distributed through the records.



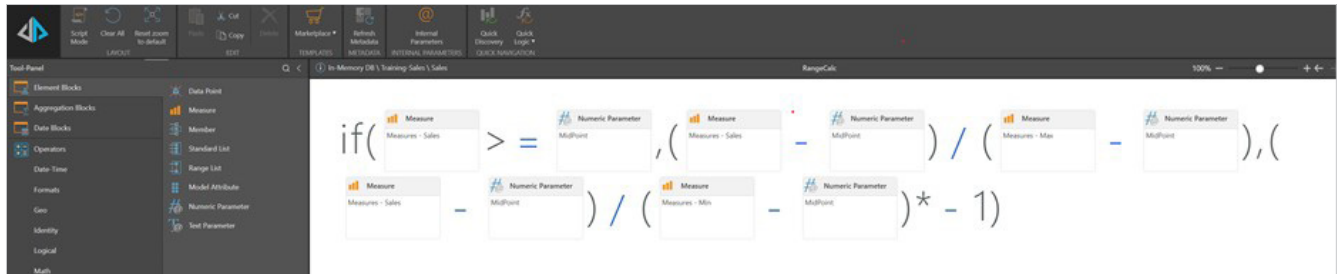
- 2 Create a global parameter. The parameter will be used to set the mid-point of the range for conditional formatting. Parameters are optional in this tip but will allow a user to adjust the midpoint on report execution. Alternatively, the median value could be used.

Set the parameter to a number and free input. Save the parameter.

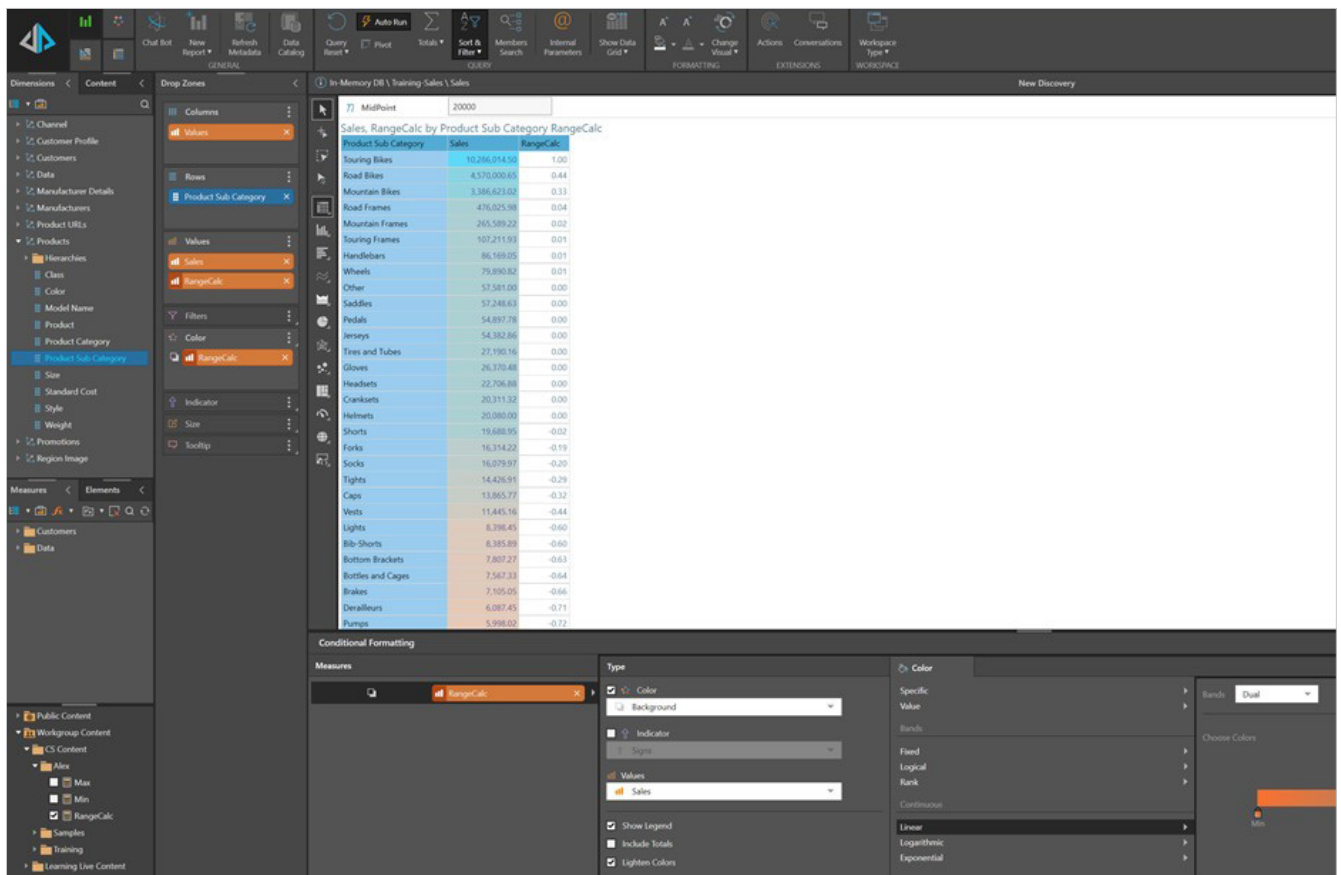


- 3 Create a formula(s) to define the range logic. A good tip is to have the formula evaluate to a number between -1 and +1. With the formula evaluating to 0 at the midpoint.

An example of this logic is shown below, where numbers greater than or equal to the midpoint are divided by the maximum measure value and values less than the midpoint are divided by the minimum value. Numbers less than the midpoint are multiplied by -1.



Return to the discover and switch the value in the color drop zone to the new formula created in the previous step. Including the formula in the discover can help to check values are calculating correctly but is not needed in the final version. In the example shown, changing the MidPoint parameter value will change the background color conditional formatting.



## Conversations

Conversations are a great way to stay within one workflow, on the Pyramid platform. As you view and analyze your data, whether within Discover or Present, you have the ability to directly communicate right where you are, with different end-users and group within the organization. The end-user or group being notified will then get a notification, either within their bulletin board, email inbox or both, of the conversations they've been tagged in.

### 1 Start with a Discover Report.

Channel	Country	Sales	Margin	Net Profit
Online	Australia	\$188,013.75	30.31%	35,266.00
	Canada	\$46,856.72	32.32%	9,555.69
	France	\$156,240.20	31.23%	33,733.88
	Germany	\$115,696.13	30.27%	21,581.09
	United Kingdom	\$149,278.64	32.63%	29,666.93
	United States	\$5,764,075.31	38.74%	1,183,467.39
Store	Australia	\$446,597.00	30.00%	86,814.28
	Canada	\$120,899.51	30.69%	25,579.94
	France	\$287,830.73	30.30%	58,904.21
	Germany	\$297,282.29	30.09%	63,727.41
	United Kingdom	\$313,410.58	31.65%	63,065.44
	United States	\$11,867,674.80	38.72%	2,412,754.26

### 2 To start a new conversation, right click on any data point within the report/grid, measure or hierarchy, and select start a new conversation, which will open the conversation dialog box, where you can write description, comments, and assign it to the end-user or group you want to receive the notification.

Channel	Country	Sales	Margin	Net Profit
Online	Australia	\$188,013.75	30.31%	35,266.00
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	Germany	\$115,696.13	30.27%	21,581.09
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	Germany	\$297,282.29	30.09%	63,727.41
	United Kingdom	\$313,410.58	31.65%	63,065.44
	United States	\$11,867,674.80	38.72%	2,412,754.26

Note that you can also take a snapshot of the Discover report and data behind it.

Sales, Margin, Net Profit by Channel, Country

Channel	Country	Sales	Margin	Net Profit
Online	Australia	\$188,013,751	20.21%	\$37,956,000
	Canada	\$44,000,000	15.00%	\$6,600,000
	France	\$15,000,000	15.00%	\$2,250,000
	Germany	\$15,000,000	15.00%	\$2,250,000
	United Kingdom	\$15,000,000	15.00%	\$2,250,000
	United States	\$5,700,000	15.00%	\$855,000
Store	Australia	\$44,000,000	15.00%	\$6,600,000
	Canada	\$15,000,000	15.00%	\$2,250,000
	France	\$28,000,000	15.00%	\$4,200,000
	Germany	\$28,000,000	15.00%	\$4,200,000
	United Kingdom	\$37,000,000	15.00%	\$5,550,000
	United States	\$11,800,000	15.00%	\$1,770,000

Angellie Admin  
2/20/2022, 12:22 PM

Subject:  
Comment For Sales

Description:  
Online Channel & Australia Sales Number

Comment:  
Can you research why these numbers seems a bit lower than what we projected last month?

Roles or Users:  
Alex Scott

Expiration Date:  
1 month

Email Participants  
 Report specific comment

Submit