

Tips and Tricks

A step by step guide to boost your BI skills

TIP #1 Add a Top 10 Filter to a Discover

TIP #2 Use Mini Map to Navigate Large Grids

TIP #3 Use this query to get a list of all objects used in Present and Publish

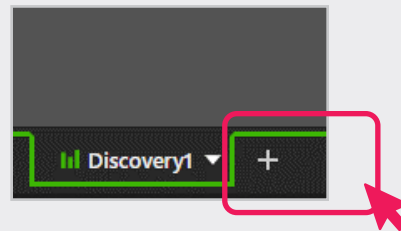
TIP #4 Add a Custom Visual from Marketplace

TIP #1

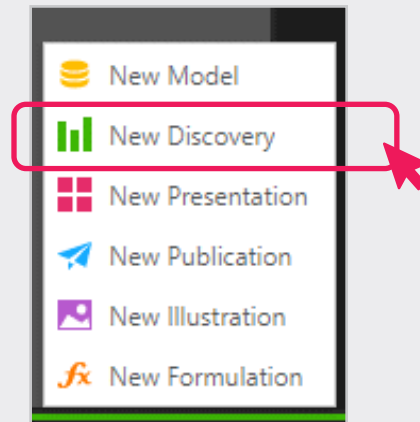
Add a Top 10 Filter to a Discover

In the following scenario we are going to use the sample demo data to create a new Discovery and only show the Top 10 Sub-Categories based on Net Profit.

- 1 Click + Button at the bottom of Pyramid

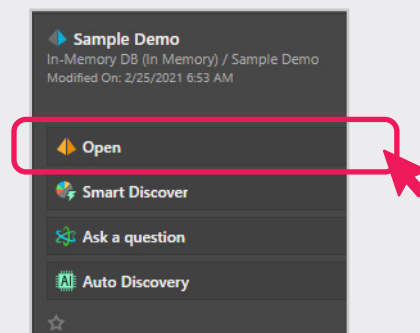


- 2 Click New Discovery



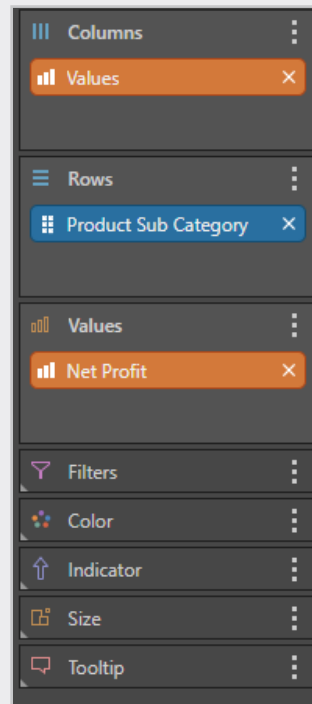
- 3 Choose your data set (For this example we are using the Sample Demo data set)

- 4 Click Open



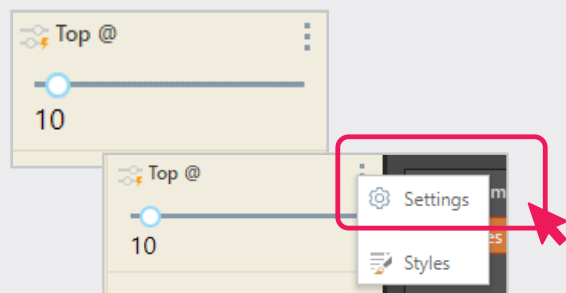
- 5 Add Dimensions and Measures to your Discover to build a visual representation of your data.

(For this example, we added Product SubCategory and Net Profit)



- 6 Drag Net Profit to Filters and choose Top Count (Note: A slider shows up in the upper right hand side of the canvas)

- 7 If you wish to change the slider to a text box for manually entry, Click on the 3 little dots to the right of the slide and Choose Settings

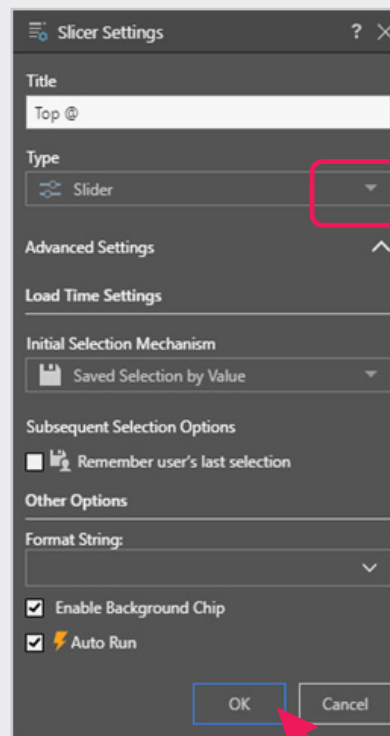
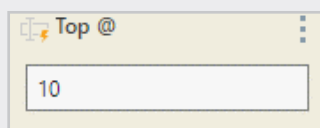


- 8 Click the drop down arrow next to Advanced Settings and the menu will expand. Your menu should look like the picture on the right:

- 9 Click the arrow under Type and choose Text Box

- 10 Click OK

- 11 You now have a Top 10 text box filter that you can manually adjust



TIP #2

Use Mini Map to Navigate Large Grids

When to Use: When you have a very large grid visualization in Discover. This will help you navigate the grid without having to use scrollbars to go to specific parts of the grid to view your data.

1 Click the Mini Map button from the Component ribbon (pink arrow). The mini map will appear on top of the grid.

2 To scroll to a section of the grid, either:

Move the mini map, by hovering over its title (blue arrow), and drag and drop the map on the location you want to scroll to or

Drag the gray highlight (green arrow) in the mini map to scroll to the corresponding location in the grid

The screenshot shows the Tableau interface with a large data grid titled "Sales, Returns by Promotion and Product". The grid has columns for Product, Sales, and various promotion types. A Mini Map is overlaid on the grid, showing a small-scale view of the entire grid. A pink arrow points to the Mini Map button in the ribbon. A blue arrow points to the Mini Map title. A green arrow points to the gray highlight in the Mini Map.

Product	Half-Price Pedal Sale	LL Road Frame Sale	Mountain Tire Sale	Mountain-100 Clearance Sale	Mountain-500 Silver Clearance Sale	No Discount	Road-650 Overstock	
Adjustable Race	126.00	63.00	210.00			126.00	168.00	315.00
All-Purpose Bike Stand	363.94		132.34			231.60	99.26	99.26
AWC Logo Cap	6,102.69	9,680.66	5,264.21	7,597.85		6,048.56	7,307.94	6,859.53
BB Ball Bearing		81.00	27.00			81.00	72.00	45.00
Bearing Ball		216.00			270.00	162.00	270.00	270.00
Bike Wash - Dissolver		81.65	20.41		163.29	81.64	183.70	204.12
Blade			7.00			7.00		14.00
Cable Lock			98.59		78.87		78.87	98.60
Chain			300.96			902.88	902.88	601.92
Chain Stays		110.00	242.00	176.00		154.00	66.00	22.00
Chaining	39.00	91.00	130.00	39.00		52.00	65.00	52.00
Chaining Bolts	380.00	342.00	114.00	76.00		114.00	266.00	304.00
Chaining Nut	36.00	99.00		18.00		27.00	54.00	18.00
Classic Vest, L	2,122.20	3,077.19	2,864.97	2,228.31		954.99	1,803.87	4,138.29
Classic Vest, M	781.68	781.68	749.11	618.83		390.84	1,074.81	651.40
Classic Vest, S	1,808.57	1,431.78	1,281.07	1,883.94		1,808.56	2,336.08	2,110.00
Cone-Shaped Race	402.84		322.26	161.13		563.96	241.70	201.41
Crown Race	728.00	208.00	364.00	624.00		468.00	156.00	
Cup-Shaped Race	443.12	281.98	281.98			120.85	161.13	80.57
Decal 1	47.00	47.00				188.00	376.00	376.00
Decal 2	420.00	210.00	700.00	630.00		210.00	490.00	630.00
Down Tube	70.00	385.00	105.00	175.00		70.00	175.00	70.00
External Lock Washer 1	281.98	40.28	443.11	120.85		40.28	120.85	120.85
External Lock Washer 2	182.00	182.00	156.00	78.00		130.00	130.00	78.00
External Lock Washer 3	201.42	40.28				523.68	80.57	443.11
External Lock Washer 4	281.98		281.98	80.57		161.13	120.85	201.42
External Lock Washer 5	147.00		63.00	189.00		105.00	105.00	21.00
External Lock Washer 6		176.00	88.00	440.00		352.00	132.00	176.00
External Lock Washer 7	336.00	288.00		192.00				336.00

TIP #3

Use this query to get a list of all objects used in Present and Publish

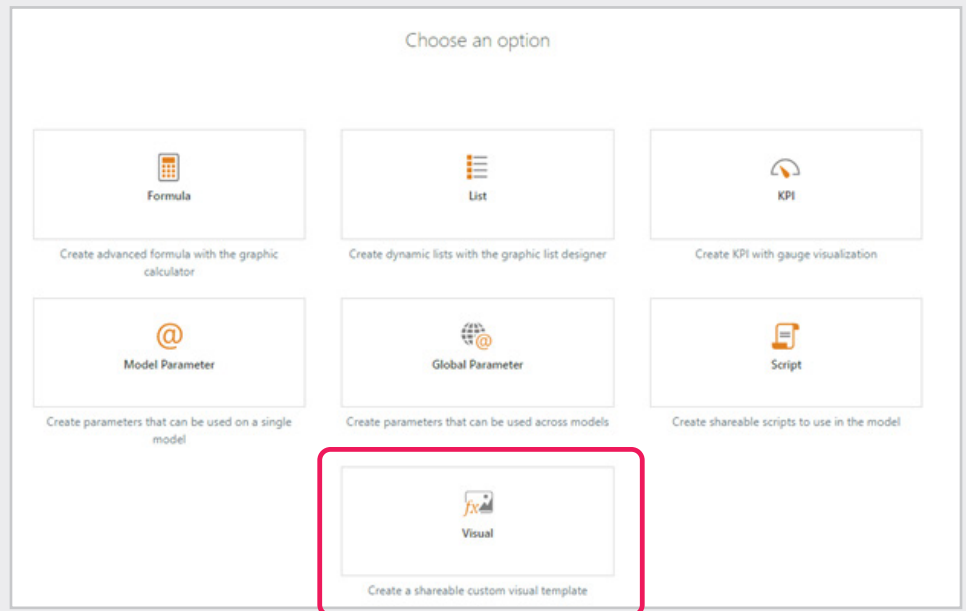
When to Use: To get a list of all Discover objects being used by Present and Publish objects (i.e. SQL version of Lineage).

```
SELECT DISTINCT
  pp.ContainerID
, pp.ContainerName
, pp.ContainerType
, i.id AS ContentID
, i.name AS ContentName
, CASE i.item_type WHEN 3 THEN 'Discover' ELSE 'Illustration' END AS ContentType
FROM (
  SELECT id AS ContainerID
  , name AS ContainerName
  , CASE WHEN (item_type = 4 AND sub_type = 2) THEN 'Presentation' ELSE 'Publication' END
AS ContainerType
  FROM content_tbl_item
  WHERE (item_type = 4 AND sub_type = 2)
  OR (item_type = 4 AND sub_type = 3)
) pp --Get List of Present and Publish Objects
INNER JOIN content_tbl_container_data cd ON pp.ContainerID = cd.container_id
INNER JOIN content_tbl_document d ON cd.id = d.container_data_id
INNER JOIN content_tbl_item_usages iu ON d.id = iu.parent_id
INNER JOIN content_tbl_item i ON iu.child_id = i.id
ORDER BY ContainerName, ContentName
```

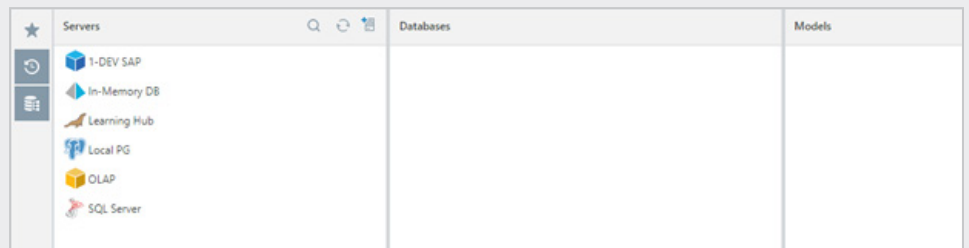
TIP #4

Add a Custom Visual from Marketplace

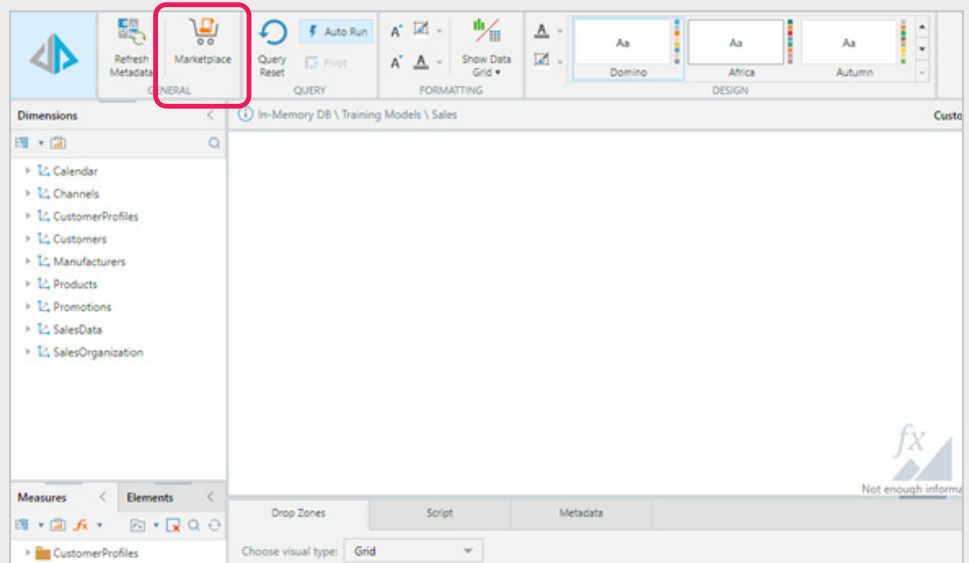
- 1 Open Formulate
- 2 Choose "Visual"



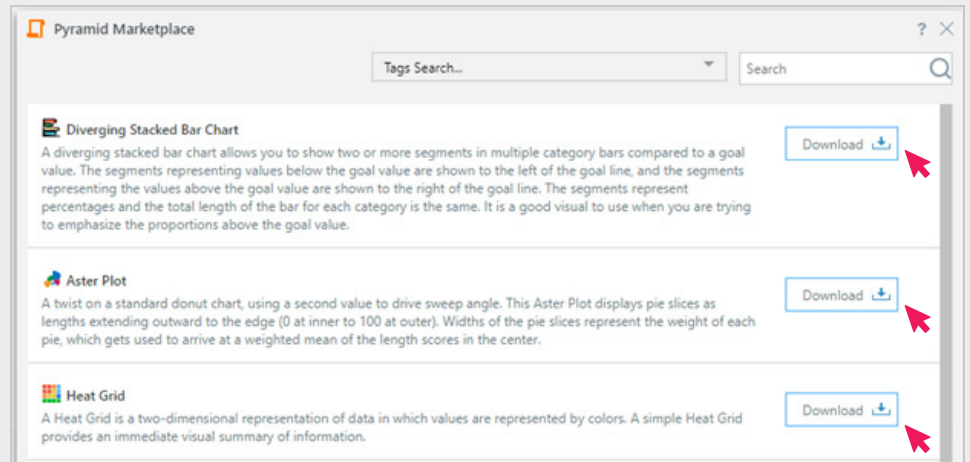
- 3 Choose data source you want to build custom visual on



- 4 Select Marketplace at the top ribbon/menu



- 5 Choose Visual to add from Marketplace and download



- 6 Start building your data discovery

For more info: <https://help.pyramidanalytics.com/Content/Root/MainClient/apps/Formulate/Custom%20Visualizations/Custom%20Visualizations.htm?Highlight=custom%20visual>