

Tips & Tricks

A step by step guide to boost your BI skills

- TIP 1

Mini Tab Layout

- TIP 2

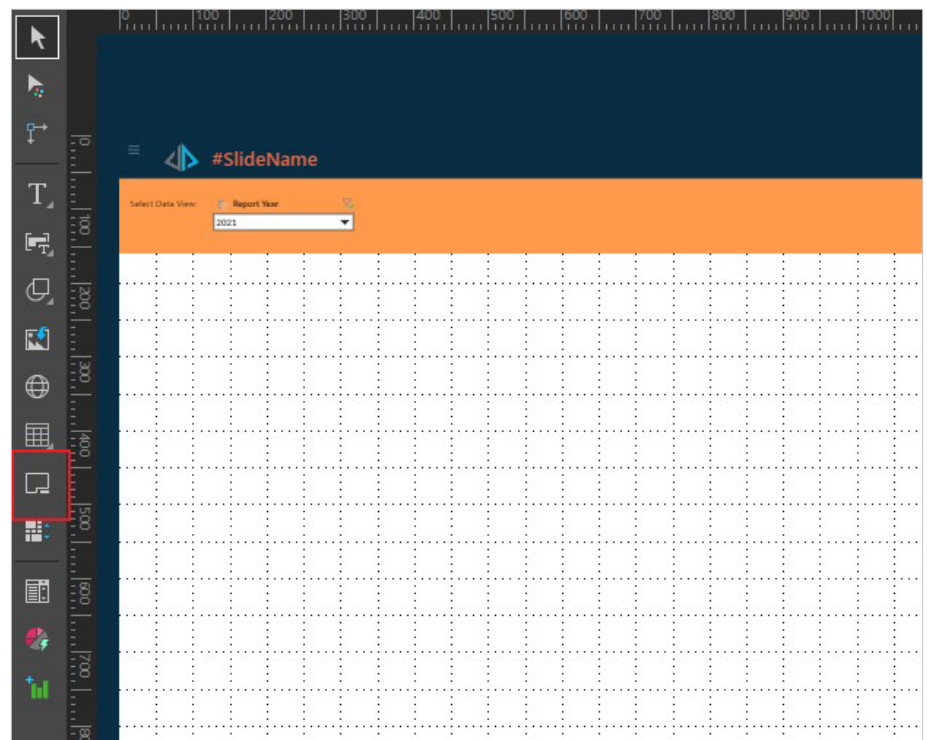
Quick KPI:
Period on Period

TIP 1

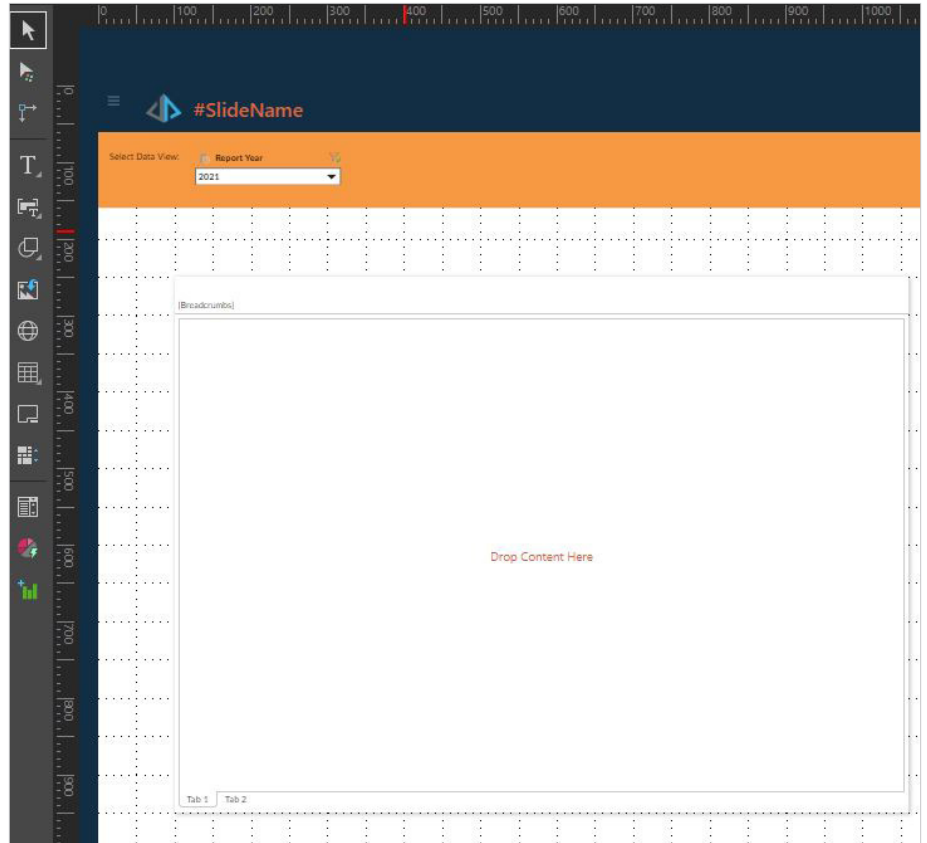
Mini Tab Layout

Mini-Tabs are a layout container that uses a tabbed container to display multiple visualizations and other assets in the same canvas, with the tabs allowing end-users to toggle from one content to another. The container features multiple tabs where a single asset can be added to each tab, and a single tab can be displayed at any one time.

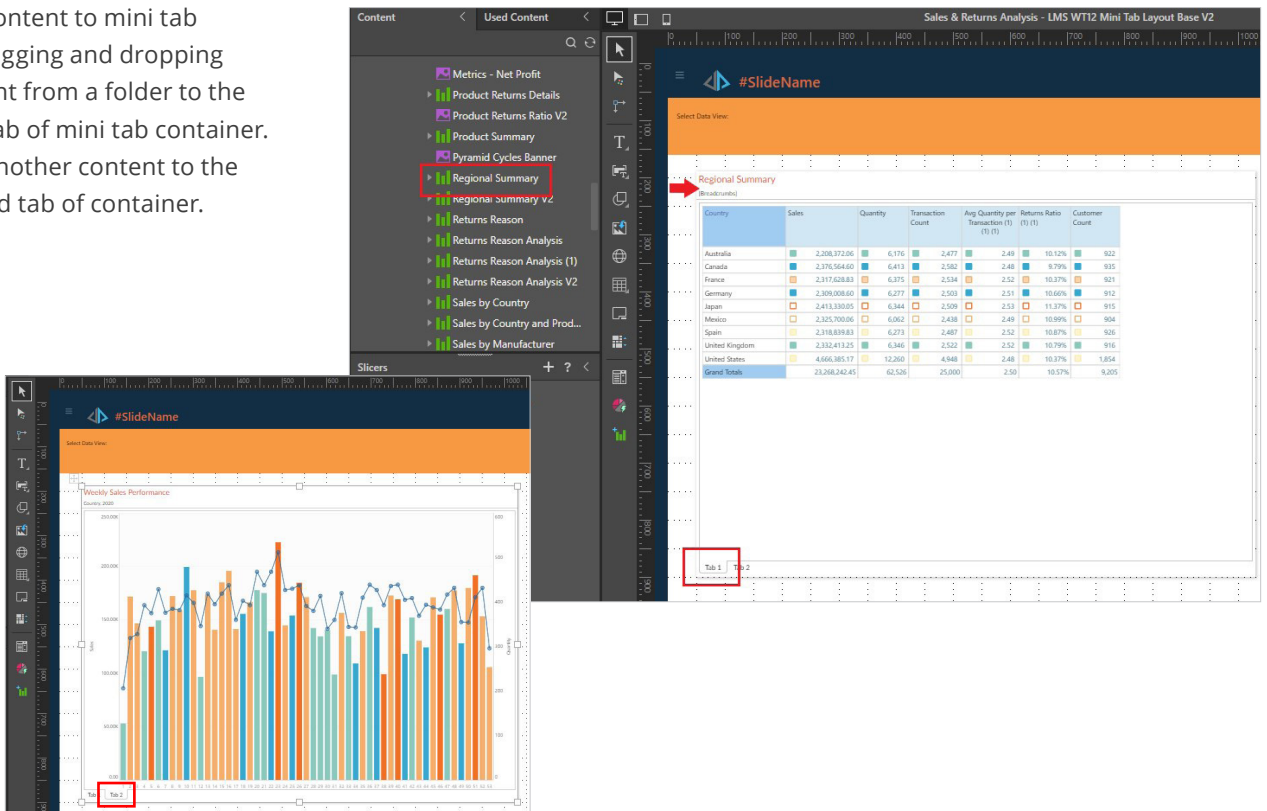
- 1 Start by creating a new presentation



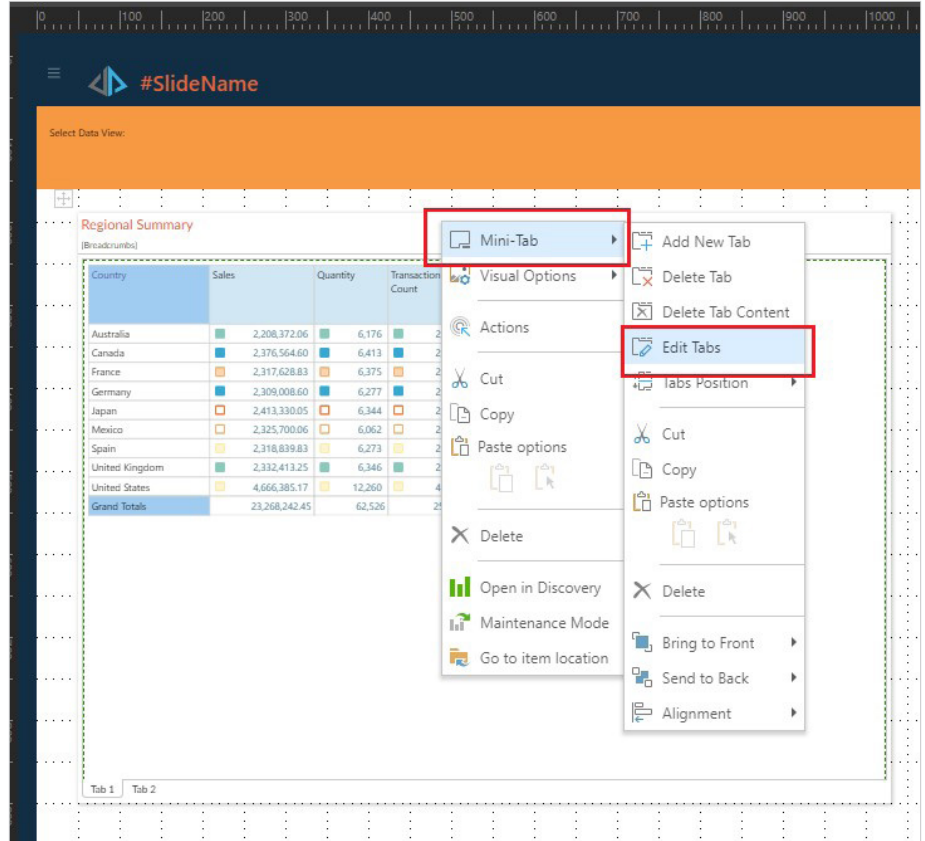
- Click 'Add Mini Tab' from the canvas menu to add a mini tab onto the canvas. Resize mini tab according to content you plan on adding.



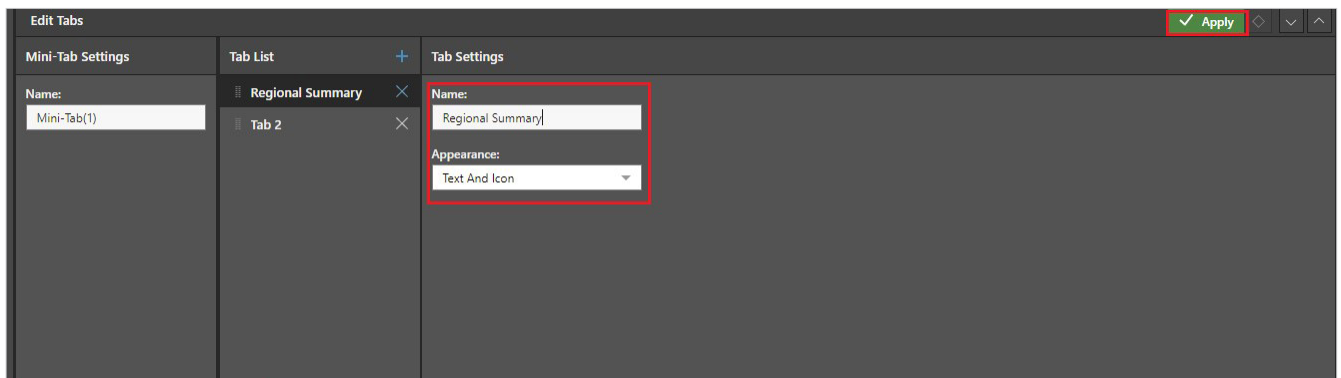
- Add content to mini tab by dragging and dropping content from a folder to the first tab of mini tab container. Add another content to the second tab of container.



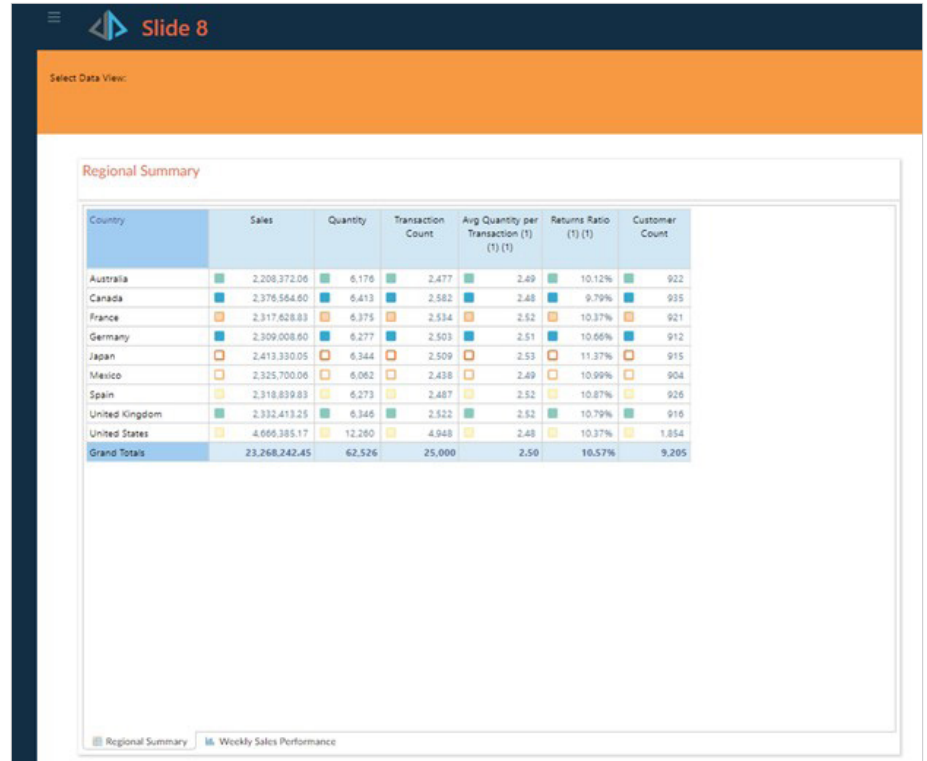
- 4 Rename each tab. Right click on the container > minitab > edit tab



- 5 Add the tab name and choose icon to represent the name of the tab. Choose Text and Icon which will show not only the name but the type of visualization on the tab name. Click apply.



- Run the presentation and now you can view multiple types of content in one mini tab container. Notice how the icon next to the tab name represents the visualization that is contained in the tab.



TIP 2

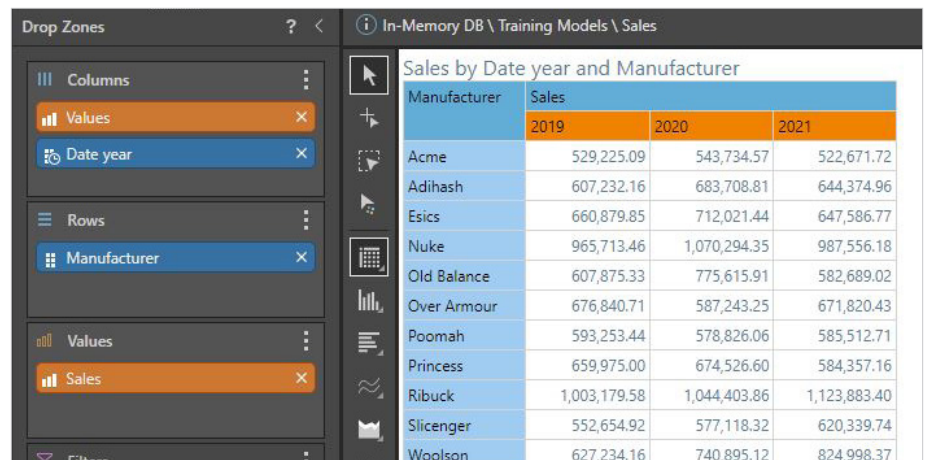
Quick KPI: Period on Period

Key Performance Indicators (KPIs) are a powerful tool that can be leveraged to identify the status of outcomes in the organization and its business goals. KPIs are composite calculations that be used to show the status of metric outcomes using up to 3 core metric values and banding:

- **actual** - a value that shows what is currently measured
- **target** - a value that measures what the goal metric should be
- **status** - a mathematical comparison between actual and target values (normally a ratio of some type)
- **banding** - a series of values to delineate between good and bad status metrics (which can then be used graphically)

In Pyramid, you can easily create KPI's using "Quick KPI" from a Discover report, and can be mainly accessed or triggered from a grid. These KPIs are going to be generated through the context of a query, with the available hierarchical selections.

- Start with a simple grid report

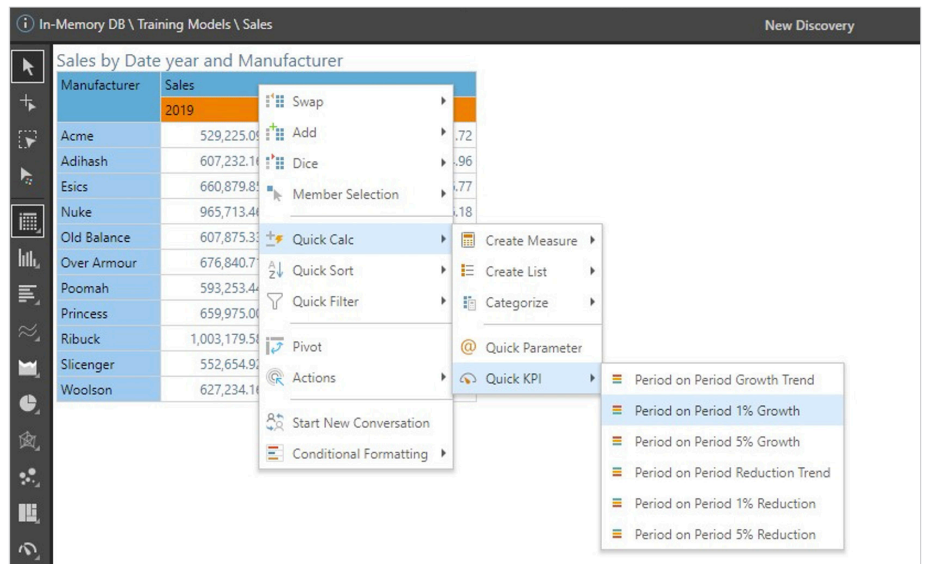


2 If you want to calculate the year over year growth of a specific metric (sales), it can be done using quick KPI.

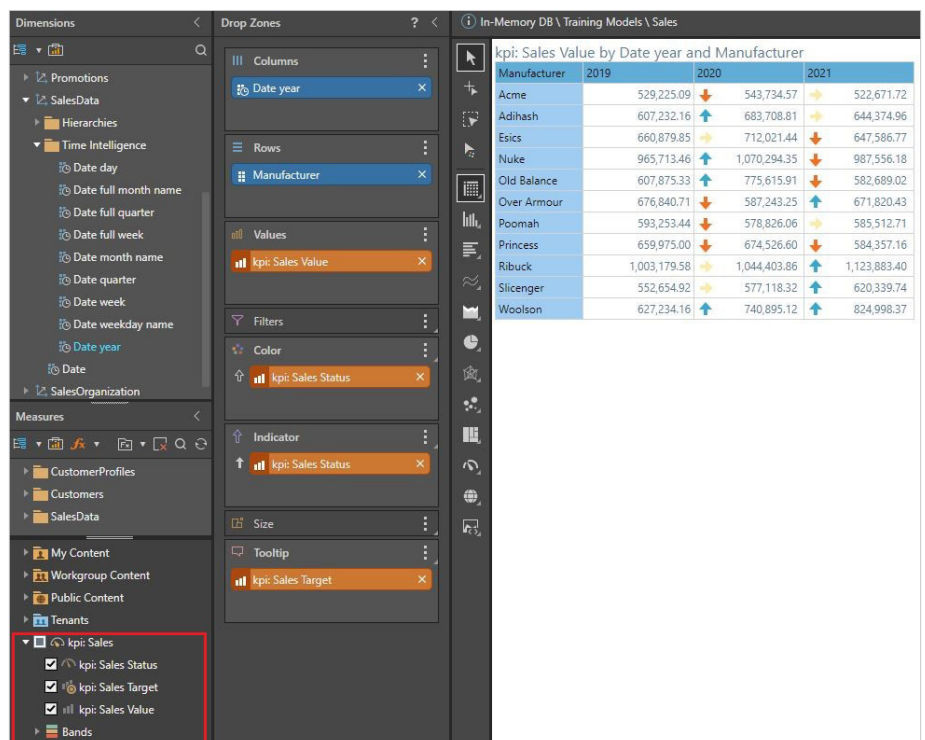
What are Period on Period KPIs?

These are KPIs created using time difference logic as well as cohorts - and then doing a simple 3-band ranking. The Period-on-Period KPIs only appear in the list if a date-time hierarchy is detected in the current query. Unlike the basic KPIs, the period on period math injected into the KPI formulation provides a layer of logic that is not easily matched with conditional formatting without building some formulas. This, with the auto-cohorting, offers a quick way to calculate whether figures for the given hierarchy are improving or degrading from one period to the next (as required), and banding the results compared to others in the cohort (evaluation set). For example, this builds a KPI for measuring which education groups are improving from one quarter the next, compared to other education groups in any given quarter.

To calculate, from your grid, right click on sales column > quick calc > quick KPI > Period on Period 1% Growth



The resulting KPI compares each manufacturer sales from one year to the next, showing a result of whether there is growth of more than 1%. The color of the indicators is driven by how well each manufacturer did compared to the other items in a given year - which is broken out into 3 bands. As such, this dynamic KPI, calculates both down the manufacturer sales and ACROSS the years.



3 Quick KPI is a great way to do sophisticated calculations on metrics using the context menu in Discover. However, if you want to further customize this KPI, you can open it in formulate which will give you more options to further define the calculations (targets, actual, bands etc).

Manufacturer	2019	2020	2021
Acme	529,225.09	543,734.57	522,671.72
Adihash	607,232.16	683,708.81	644,374.96
Esics	660,879.85	712,021.44	647,586.77
Nuke	965,713.46	1,070,294.35	987,556.18
Old Balance	607,875.33	775,615.91	582,689.02
Over Armour	676,840.71	587,243.25	671,820.43
Poomah	593,253.44	578,826.06	585,512.71
Princess	659,975.00	674,526.60	584,357.16
Ribuck	1,003,179.58	1,044,403.86	1,123,883.40
Slicenger	552,654.92	577,118.32	620,339.74
Woolson	627,234.16	740,895.12	824,998.37

Data Point
Date year - Previous Member, Measures - Sales

x 1.01

kpi: Sales
Folder:
Created: Angielie Admin (9/26/2022, 4:52:21 PM)