

Tips & Tricks

A step by step guide to boost your BI skills

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Value / Percentage Switching on a Grid or Chart

• TIP 2

Report Members as List Filter

TIP 1

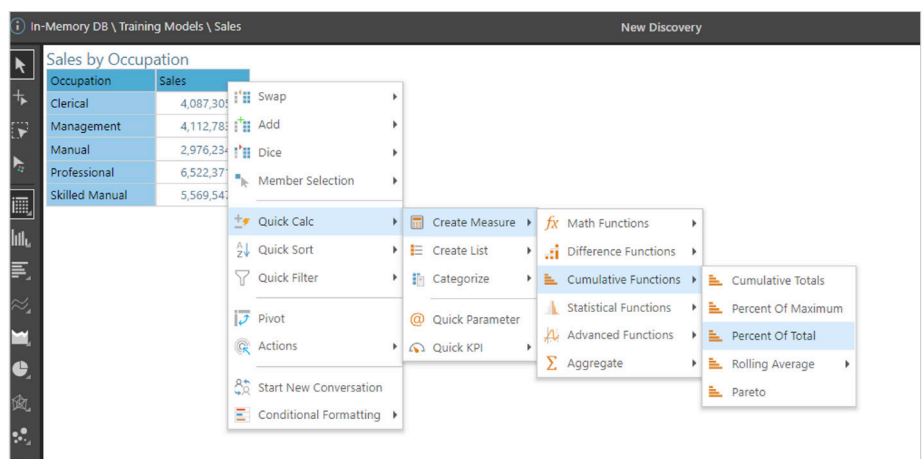
Value / Percentage Switching on a Grid or Chart

When you want to be able to switch or display different values on a grid, or chart, like the base value AND also it's % value of the total, it can be done using several techniques in Discover, without the need for any complex coding or calculation.

In this example, we will use a sales metric, and find the % of total value for this metric. Starting report:

Occupation	Sales
Clerical	4,087,305.60
Management	4,112,783.64
Manual	2,976,234.26
Professional	6,522,371.50
Skilled Manual	5,569,547.45

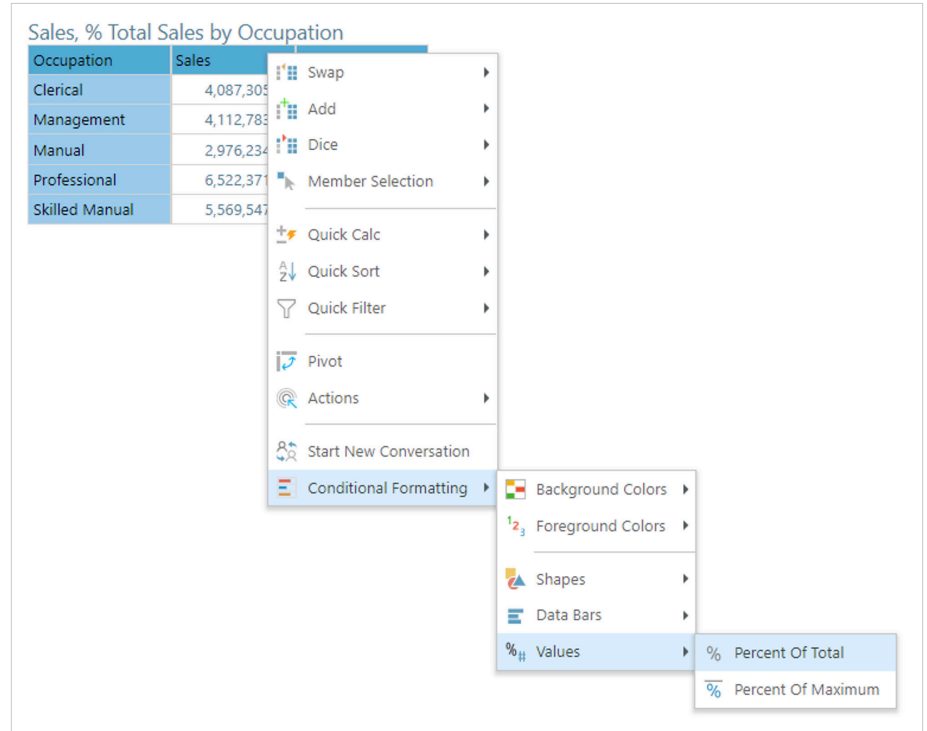
- Using the right click context menu, right click on the Sales header and choose % of total following the click path below. Notice all the different no-code calculations you can incorporate besides % of total.



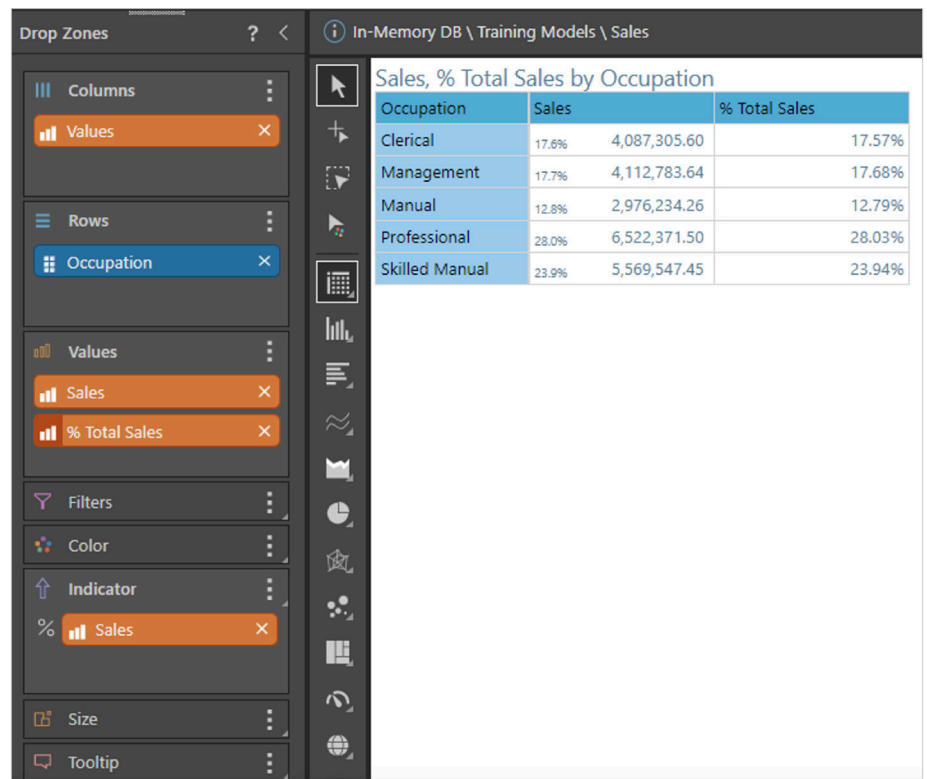
The newly created measure will be added on the grid:

Occupation	Sales	% Total Sales
Clerical	4,087,305.60	17.57%
Management	4,112,783.64	17.68%
Manual	2,976,234.26	12.79%
Professional	6,522,371.50	28.03%
Skilled Manual	5,569,547.45	23.94%

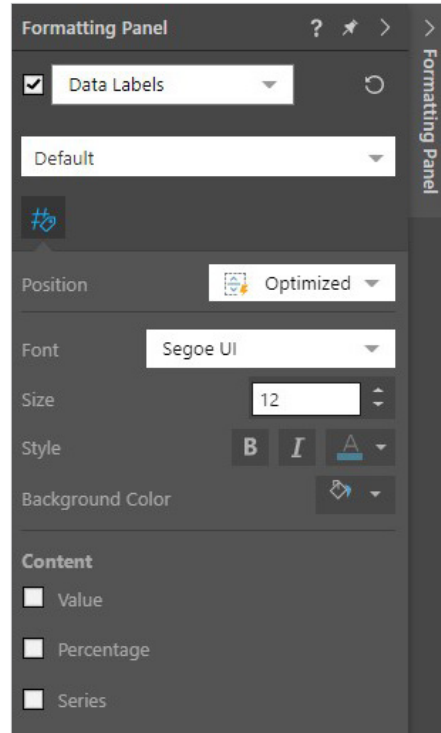
2 Using conditional formatting, you can add % of total as an indicator, in the same cell as the sales metric



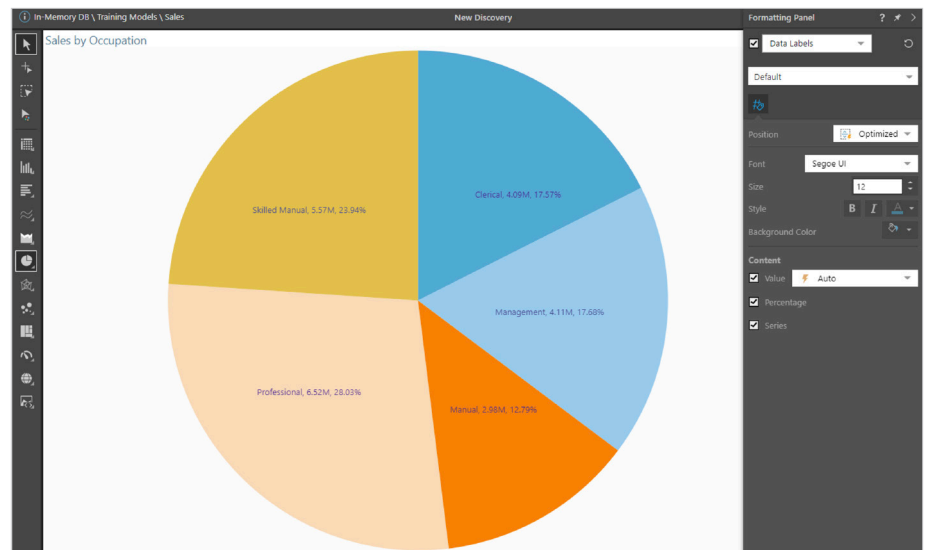
The % of total measure is then added as an indicator on the grid, in sales column



3 Using Formatting Panel with a pie chart. Start a brand new pie chart report. Open Formatting Panel from the right side of the canvas.



Go to the “data labels” property, and under content, choose the information/label that you want to show in the chart.



TIP 2

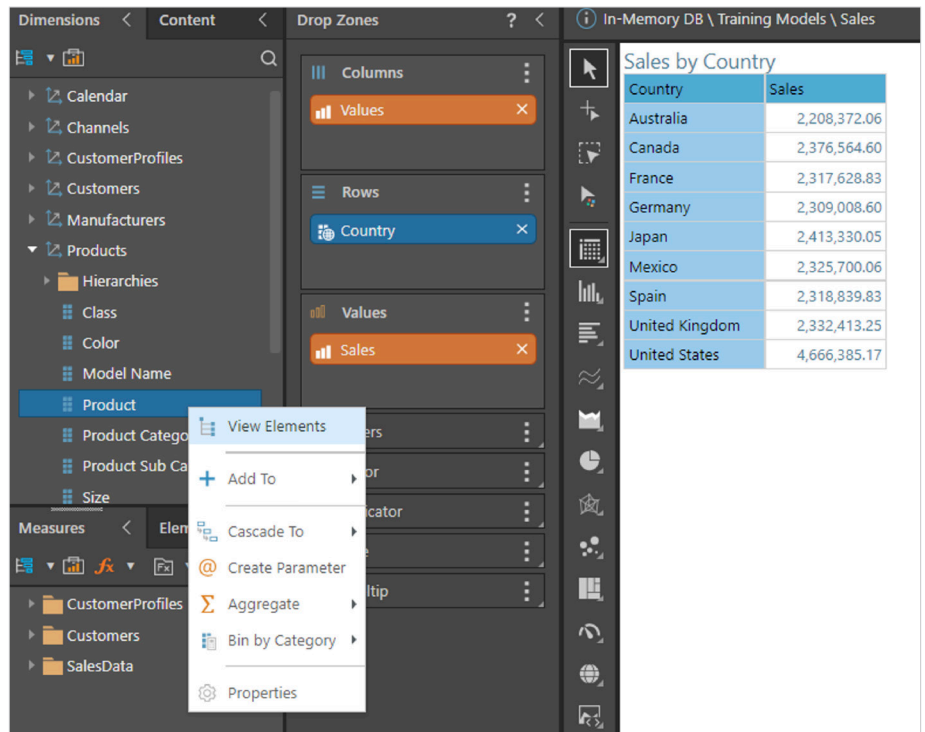
Report Members as List Filter

Did you know that you can use members/elements of a dimension that you can build a list out of, and then use as a filter within your Discover report? In this scenario, you want to be able to filter a sales report by country, using a list of specific products you are tracking.

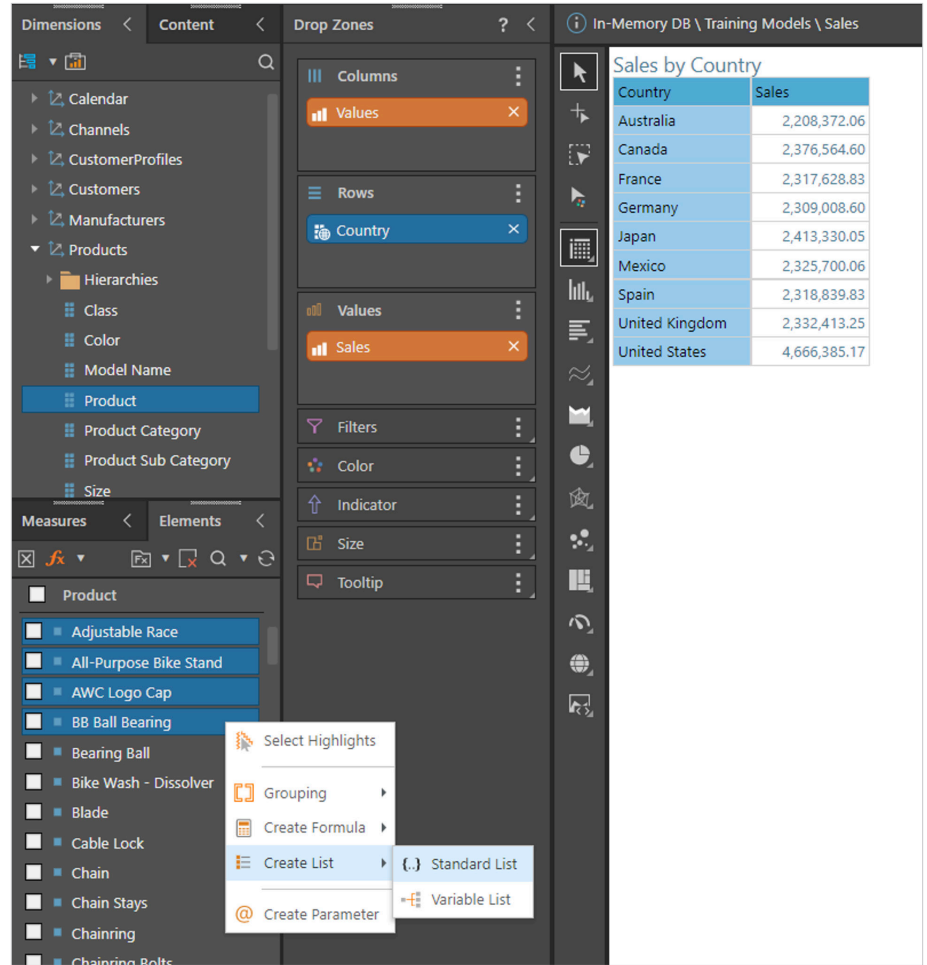
Start with this report:

Country	Sales
Australia	2,208,372.06
Canada	2,376,564.60
France	2,317,628.83
Germany	2,309,008.60
Japan	2,413,330.05
Mexico	2,325,700.06
Spain	2,318,839.83
United Kingdom	2,332,413.25
United States	4,666,385.17

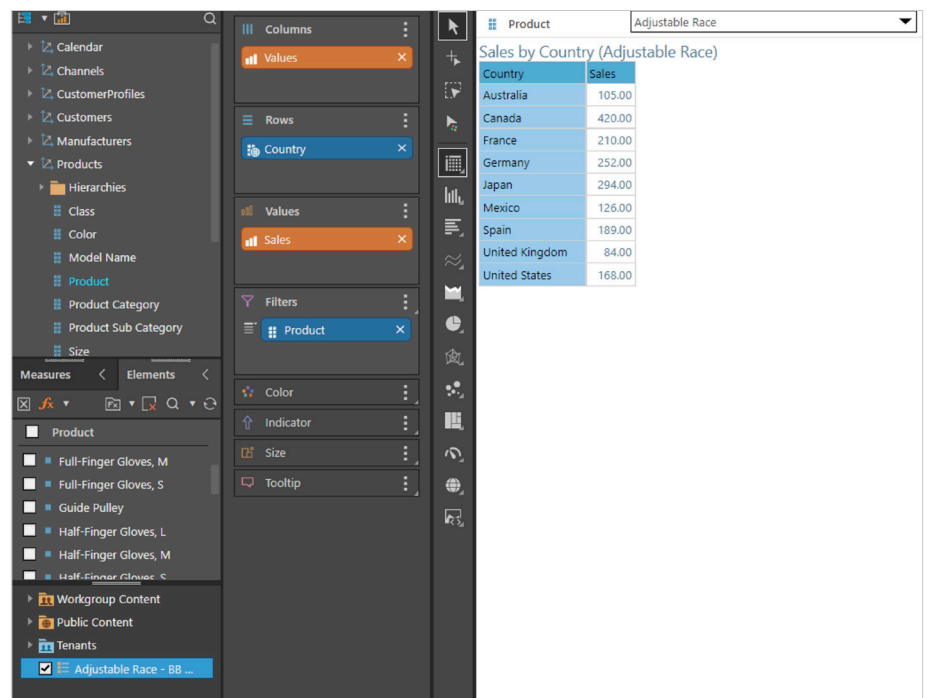
- 1 Find the dimension whose elements you want to use as a filter. Right click > View Elements



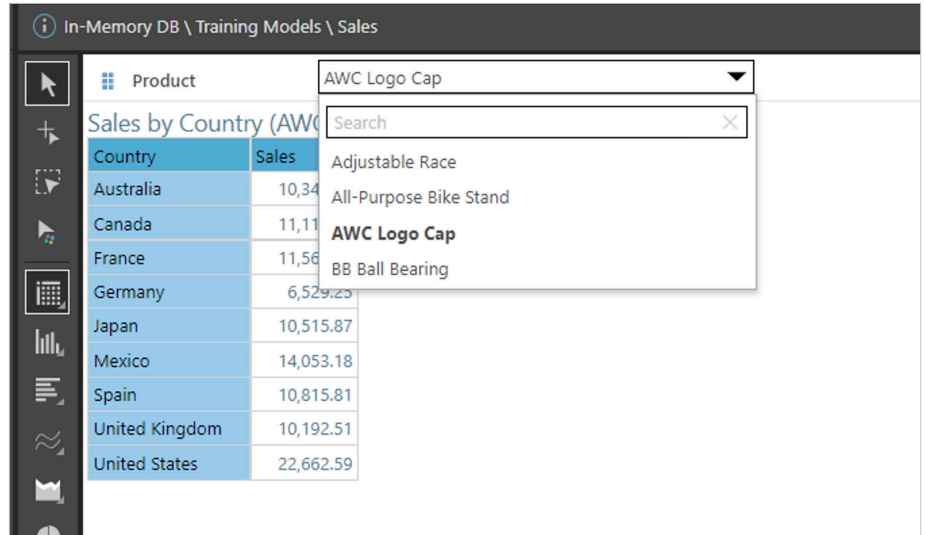
- In the elements window, CTRL + CLICK to select the elements you want to use as a filter for the report > right click > create list > standard list



- It then creates a list which you can then use to filter the report. Simply select the checkbox, and see the list appear as a filter for the report.



4 Use list to filter report. From here, you can also modify the slicer settings to change the filter type (default is drop down)



Modify slicer settings

