pyramid

Tips & Tricks

A step by step guide to boost your BI skills

● TIP 1

Matrix Table Layout

● TIP 2

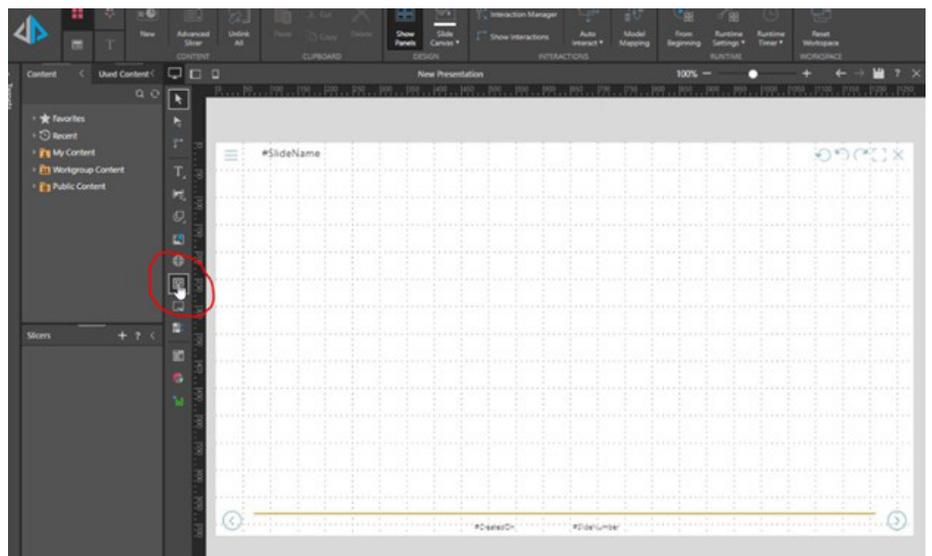**Automatic Column Handling**

TIP 1

Matrix Table Layout

A new Matrix Table Layout container for dashboards and publications has been added that will allow designers to arrange multiple visualizations and illustrations using a tabular structure with rows, columns, and associated formatting.
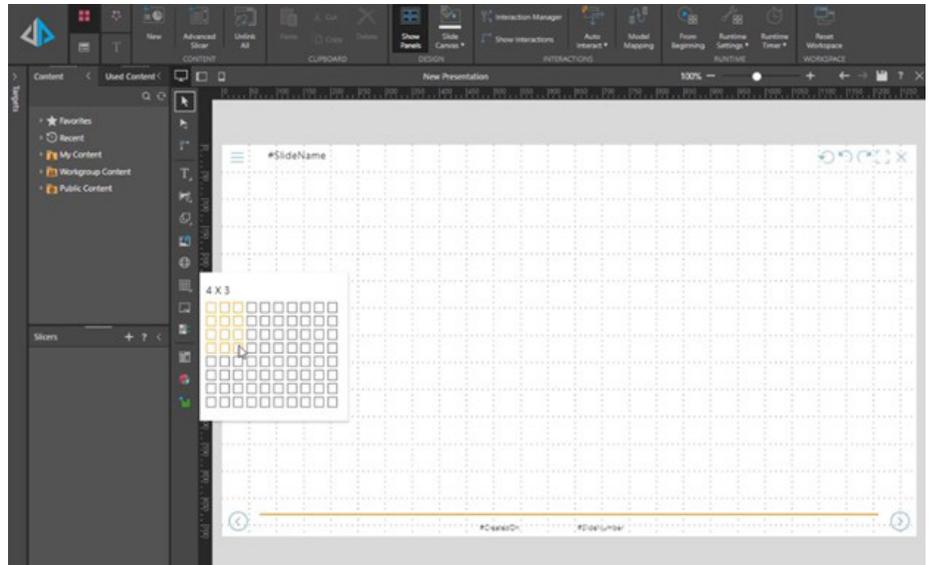
This new layout option expands the ways content can be laid out and displayed to end-users. It allows designers to build a tabular layout of different content elements, which are often used when building KPI scorecards.

1 Start by creating a new presentation

2 Click 'Add Matrix Table' from the canvas menu to add a default table of 3 columns and 3 rows
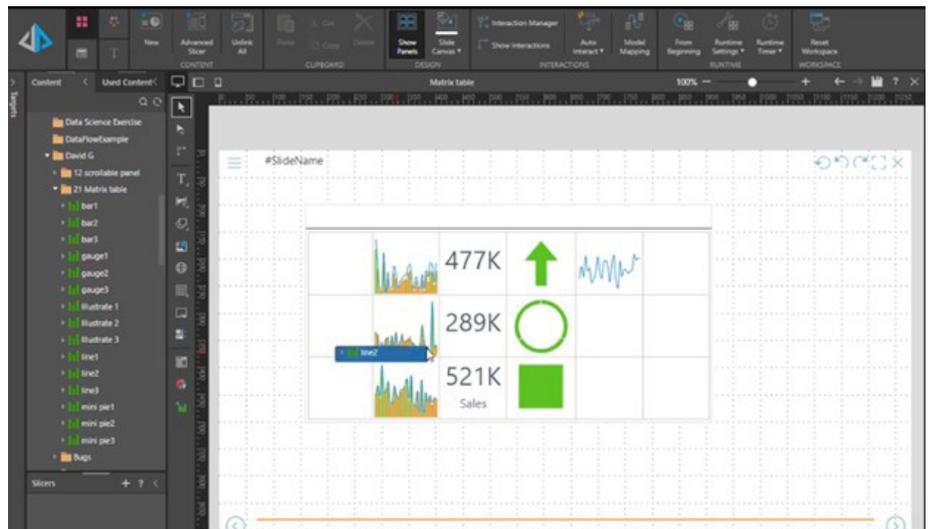
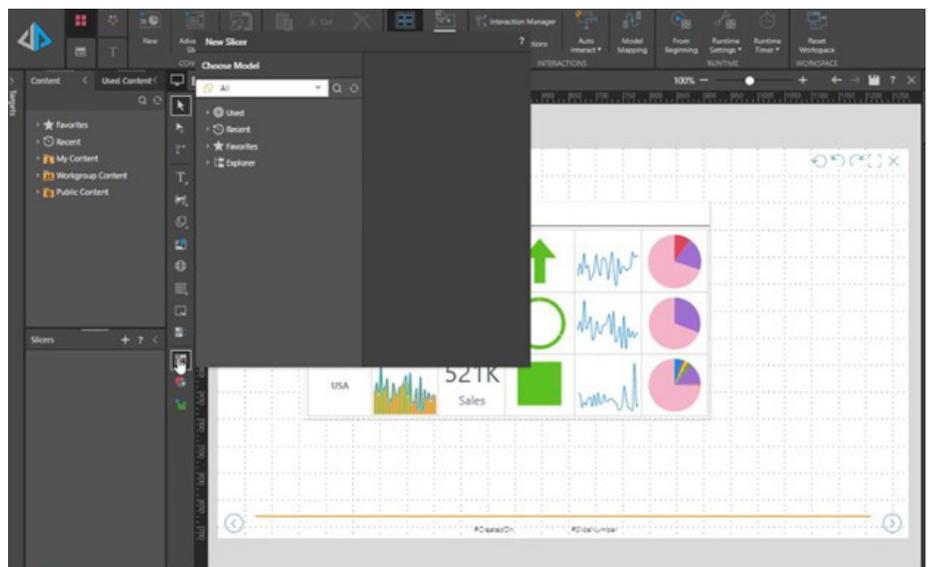Or you may right click the tool to specify the table size

3 Resize the column or row boarders by clicking and dragging the lines within the matrix

4 Begin to add your discover items/content you would like to include in the matrix

5 Add a slicer to the presentation by which you want to filter your dashboard with. Do this by clicking 'Add New Slicer" from the canvas menu. Define interaction between slicer and objects. Run the presentation.

Automatic Column Handling

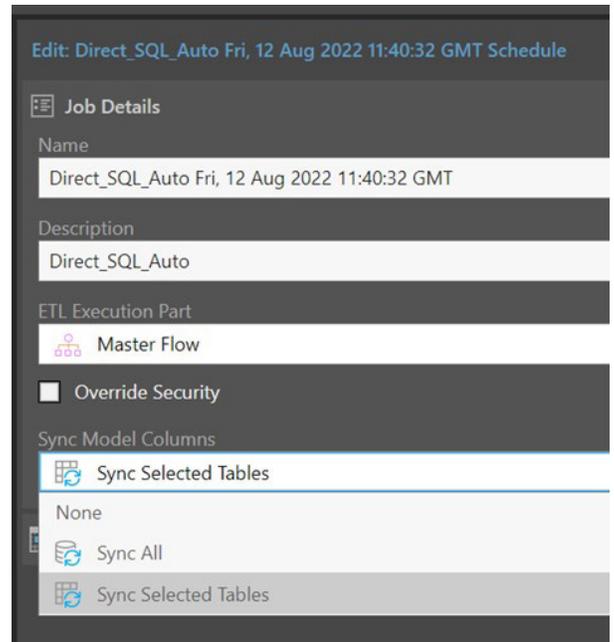***Available from Pyramid version 2020.25*

Automatic Column Handling allows users to update chosen tables in the semantic model each time the model is processed by automatically adding new columns to the semantic model added physically to the underlying tables. Similarly, columns that have been removed from the physical tables will also be removed from the semantic model. This is especially useful for Direct Query models that need to be kept in sync with changes in the underlying database tables.

1 The Automatic Column Handling feature is added in the same tab as the Models Schedules.

In the Job Details section, select SyncModelColumns. This is used to define the synchronization mode.
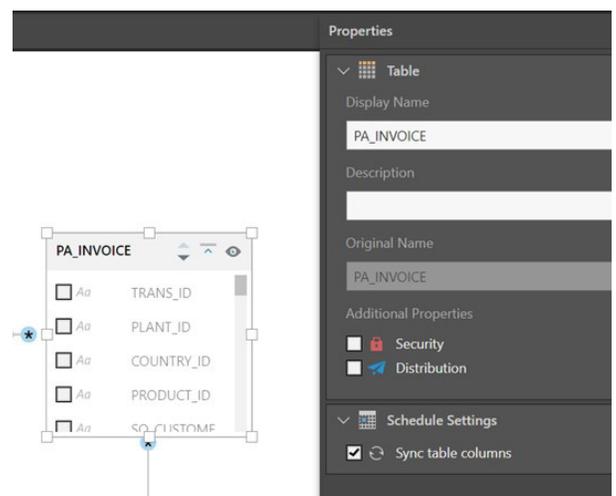
There are three options:

- **None** – No columns in the model are synced. This is the default value.

- **Sync All** – Sync all the tables in the model.

- **Sync Selected Tables** – Sync some, but not all, the tables available through the model

2 If the user selects **Sync Selected Tables**, they must select the tables that need to be synced. This is done directly in the model. Open the Model, then the Data Model tab, then the tables element.
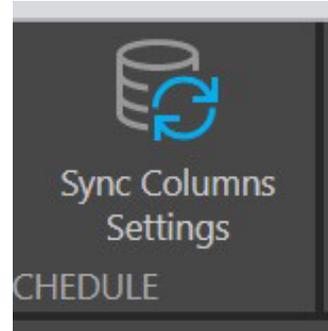
For each table that needs to be synced, click on the Table's heading area (clicking on a column name will open the column feature, which has different options). In the Properties section, select Sync table columns.
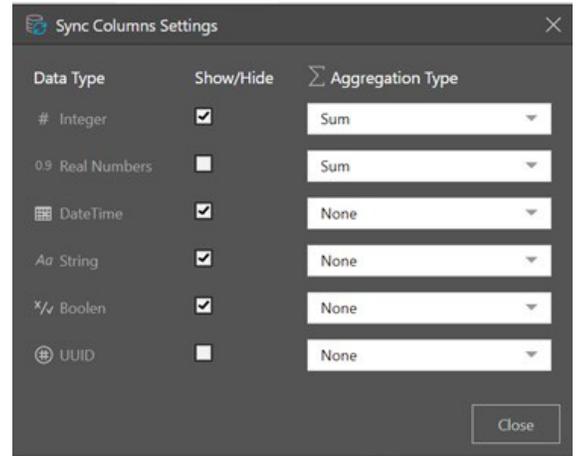
Sync Column Settings

This feature allows users to define how each data type in a model will be defined.

In this case, when refreshing the columns, the sync defines how the new columns will be displayed in the database.
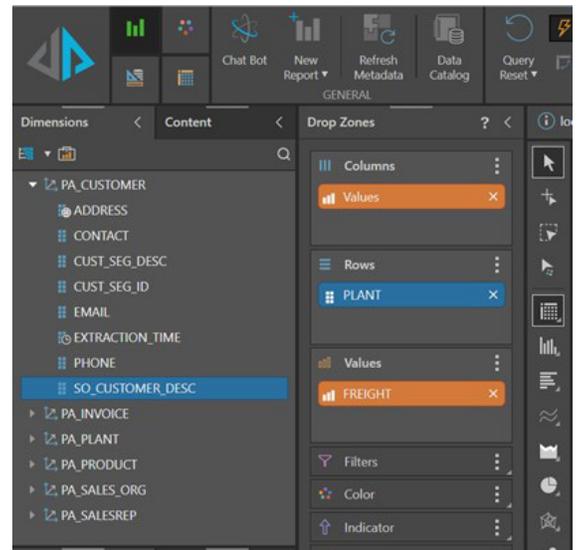

In the example on the right, if the new column is an Integer value, the column will be not displayed. If the column contains a Real value, it will be displayed, and any aggregate value for the column will display the column's sum.

It is possible to setup multiple different schedules for a Model. This could be utilized, for example, to run a model daily without column synchronization, then a different schedule running monthly that synchronizes the columns between the data source and model.
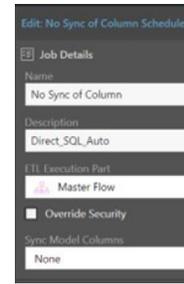

---

3 Example demonstrating usage of the feature. Discover in Pyramid using a direct query model, showing the PA_CUSTOMER table

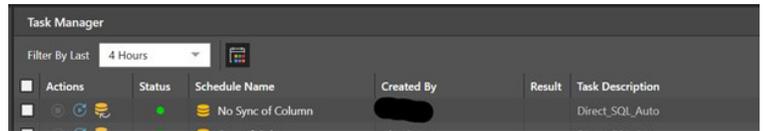A script is run on the database to update this table to include a First and Last name.

alter table [dbo].[PA_CUSTOMER] add FIRST_NAME varchar(255)
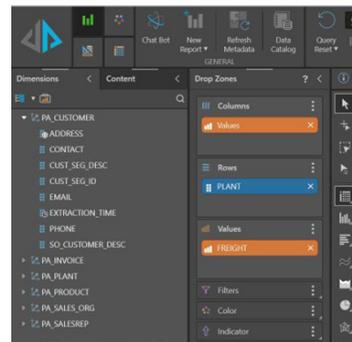
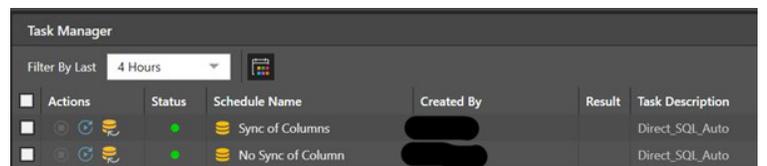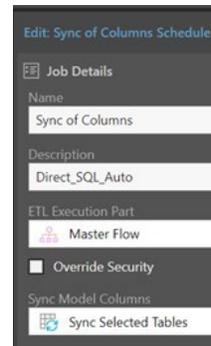alter table [dbo].[PA_CUSTOMER] add LAST_NAME varchar(255)

Schedule is run set to 'Sync Model Columns' = Non

In the discover object the user clicks on "Refresh Metadata". PA_CUSTOMER dimension remains unchanged

Schedule is run set to 'Sync Model Columns' = Sync Selected Tables

In the discover object the user clicks on "Refresh Metadata". PA_CUSTOMER dimension has been updated