

Tips and Tricks

A step by step guide to boost your BI skills

- TIP #1 Text Wrapping
- TIP #2 Copy "Styles" Between Discover Reports
- TIP #3 Quick KPI Wizard in Discover

TIP #1

Text Wrapping

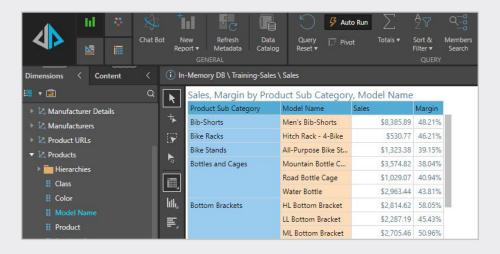
Word wrap has been added as a formatting option for all parts of the grid visualization. This option allows end users to include long text items in grid visualizations, extending the core use case for grids from purely analytical capabilities to listings and table-style reporting.

1 Open a grid report in Discover

By default, when you adjust the size of the column the column header wraps automatically, however when you decrease the column size for rows of data by default the data in the row is truncated.

In order to implement text wrapping go to the new formatting zone and select the rows option and then check the box to Wrap Text.

2) Component Menu > Format Visual



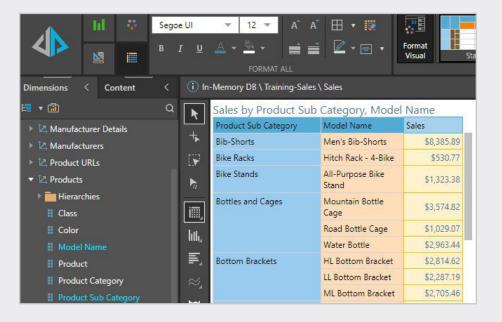
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(3) In Format Visual Menu, select rows, and check the box for "wrap text"

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The data now wraps automatically.



Copy "Styles" Between Discover Reports

This nifty capability allows end users to easily copy any format customization made in one visualization or report to another with a single click, dramatically reducing the time needed to replicate settings and designs.

 Open an existing Discover that you want to copy the formatting from, go to the "Design" context menu and select "Copy Styles"

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		Clothing	\$148,799.58					
		Components	\$1,107,647.79					

2 On the destination Discover report, go into the "Design" context menu and select "Paste Styles", this will apply the rich formatting from the previously copied Discover report.

> Note: This works for visualizations (charts etc..) as well, allowing to rapidly apply rich formatting "standards" to a newly created data visualization.

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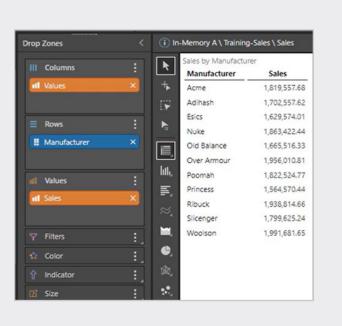
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(1)

Quick KPI Wizard in Discover

Open a report in Discover.

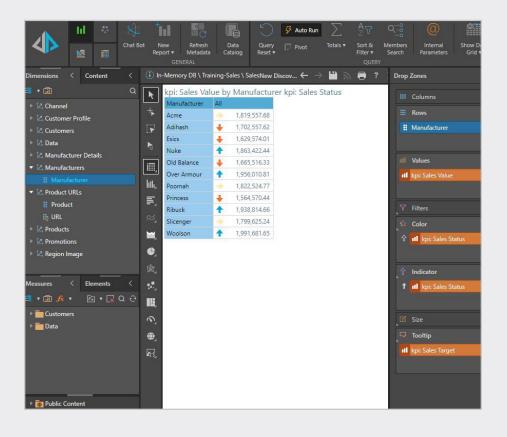
New Quick KPI Wizard that heuristically adds all the steps needed to build out full KPIs via menu or simple dialog. This new wizard makes the creation of powerful KPI logic quicker and easier through an AI driven engine which can implement an advanced logic for Pyramid users, with just a single click.



2 Right Click on the measure directly on the grid, and then > Quick Calc > Quick KPI > Basic.

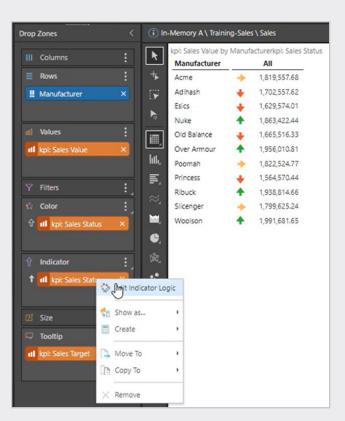
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3 This will result in an instant KPI with three different bands. The actual, target and status values are built automatically and inserted in the appropriate areas of the dropzones to get the KPI Bands.

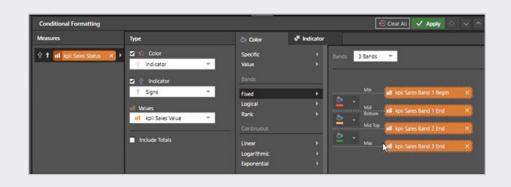




(4) Right Click on the orange chip in the "Indicator" section > "Edit Indicator Logic" to see the logic of each band that was assigned.



(5) The result of step 4 will trigger the Conditional Formatting page where we can see details about the Bands chosen automatically, and have the ability to modify the logic as desired.



(6) (Optional): Add additional element in the grid and the KPIs will automatically update.

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