pyramid

Tips & Tricks

A step by step guide to boost your BI skills

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Report
Personalization

• TIP 2

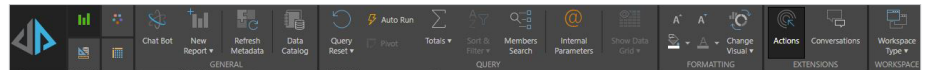Advanced List
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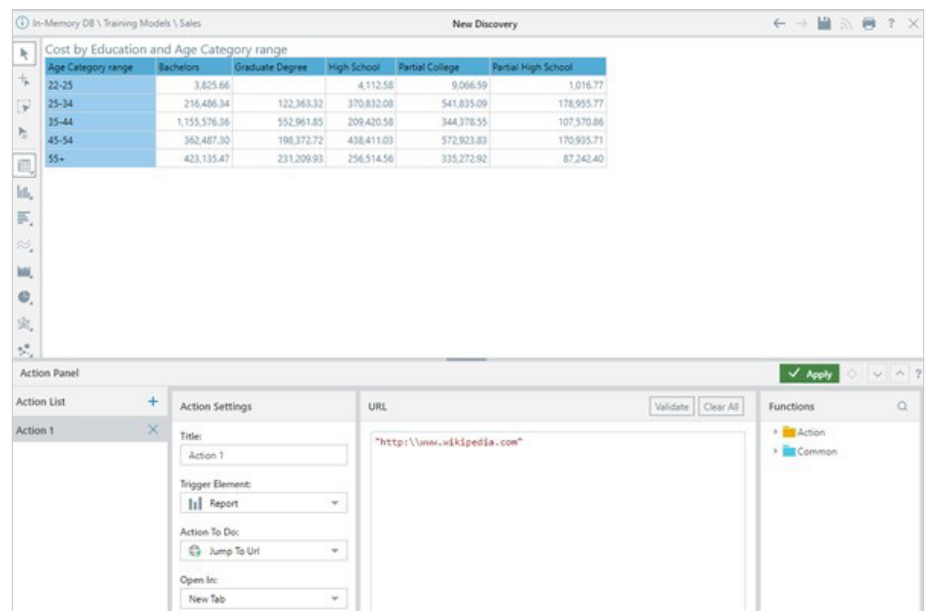---

TIP 1

Report Personalization

Actions are a convenient and effective means of extending the classic flow of analytics. Use the Actions wizard to configure specified actions that will be triggered when a user clicks somewhere on the visual. You can jump to report, a URL, or execute a JavaScript.

1 At the top of the Discover page, in the Report menu ribbon you will find the Actions button.

2 In the Actions Wizard, you can define actions to take place within a Discover report.

The beauty of this is that any discover whether used as a standalone or embedded can make use of this functionality. On top of that any discover that is used in a Present dashboard keeps these actions and more can be added on top from within the Present!
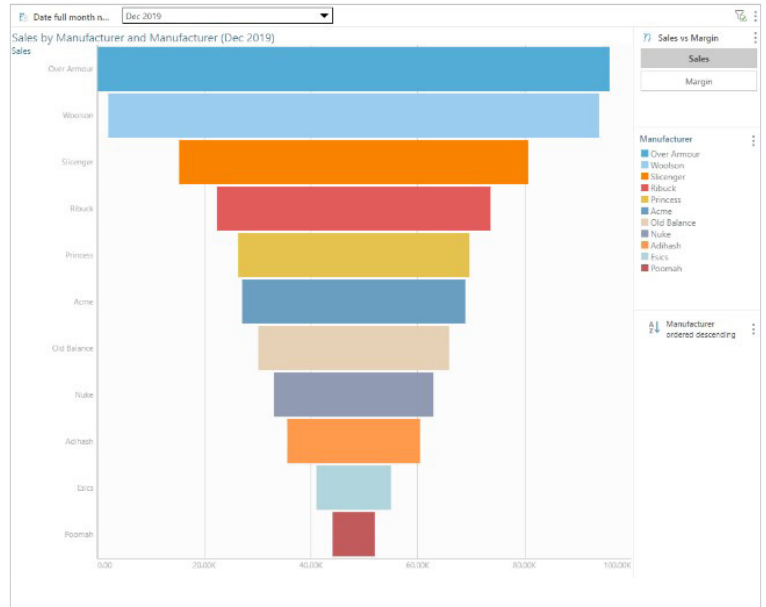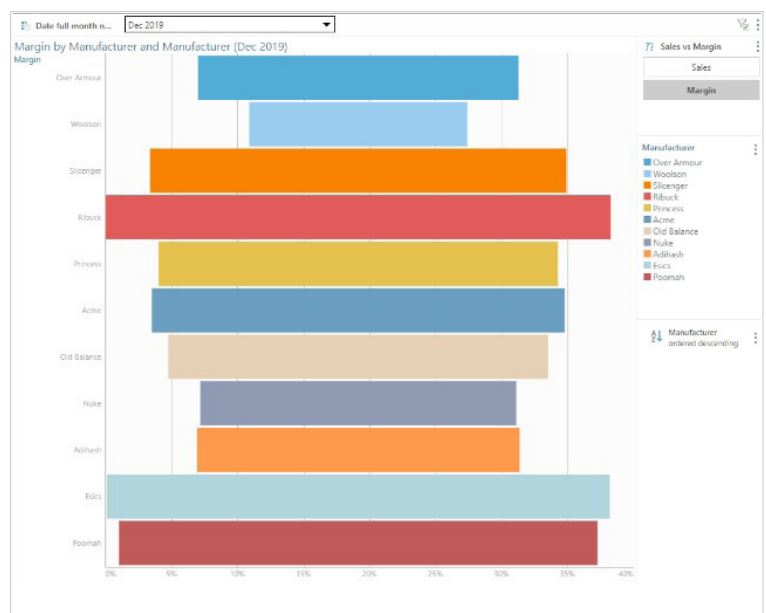
Advanced List Ordering When Using Switches

This tip works hand in hand with switches, however if you want to use this outside of switches then it's a great way to get consistent ordering on a defined set. In some cases your Discover report may need to jump between multiple measures displayed over the same visual. Often this needs to be ordered in some way, commonly descending based on the measure that is currently being used. If you have used a measure switch then you cannot natively order due to the fact that you cannot define the measure you are using until you run the visual.

1 In this example is a simple tornado chart looking at sales by manufacturer and used a switch to jump between different measures (sales or margin). Specifically it is in descending order and the Discover report has used Sales to create that ordering.
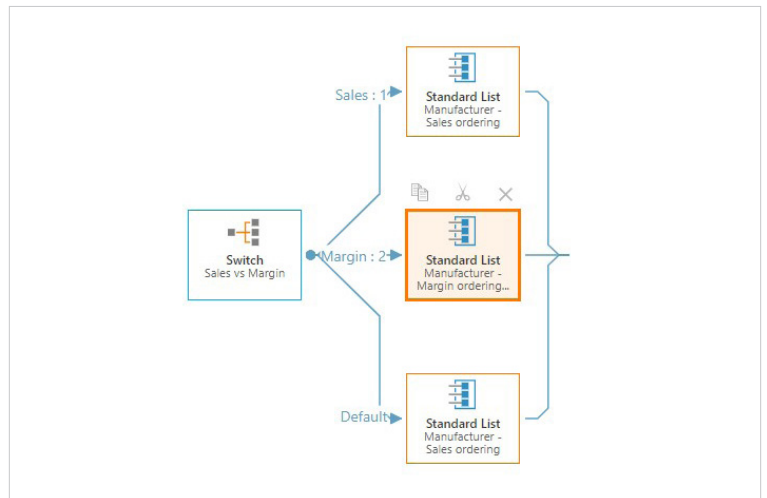

2 Now look what happens when switching the measure to margin—it has used the Sales ordering vs the margin measure which usually does not make sense.

3 To get around this, use an ordered list in formulate based on the dimension. Open formulate, choose list, and choose the dimension you want to order and order it using one of the sort options by one of the measures in your switch. Repeat as needed for all measures.

4 Lastly build a switch (found in formulate's list options) and use the same parameter used in your measure switch. Add your dimensional ordered lists to this switch.

5 Replace the dimension used in Discover with this new ordered switch list.

As you are using the same parameter to drive the switches, now they will power not only the value being visualised but the order of the dimensional members.

When you use your switches in discover then it will change not only the measure, but dimensional values too, though please remember to remove and ordering pre-defined on the dimension from your discover.

Here you can see the same screen shot as before but its ordered by the margin not the sales value.

Customizing Axis in a Chart

In some instances you will need to customize the axis in a chart. This can be very handy if you have a range of fixed values and allows you to be consistent in scaling a chart, for example.

1 In the component menu, click on Format Visual. This will bubble up the formatting panel for the visualization or selected object in the Discover report.

2 By selecting the formatting options you can select the settings and under the proportion drop down you can find the fixed size option. This will reveal the custom option in scale bounds where you can set the range you want to apply.