

# **Tips & Tricks**

## A step by step guide to boost your BI skills

## • TIP 1

### • TIP 2

Direct Query

Direct Query – Creating Custom Tables Initial Selection for Slicers

• TIP 3

### TIP 1

## **Direct Query**

Direct querying is powerful because it requires minimal setup and ensures that queries are built with the real-time data. As there is no data model output, there is no need to create any scheduling. Instead, whenever a user builds a query, Pyramid queries the actual data source, rather than data that was copied into Pyramid.

When setting up direct querying for a data source, additional nodes cannot be connected to a direct query data source node. Once you've selected this option you can continue directly to the Data Model part of the ETL, where you can construct the semantic data model.

Pyramid provides a list of built-in data sources and those that support direct query **here.** 

Add the data source to be queried directly to the model data flow. Select the server and database then click the box "Direct Query Data Source".

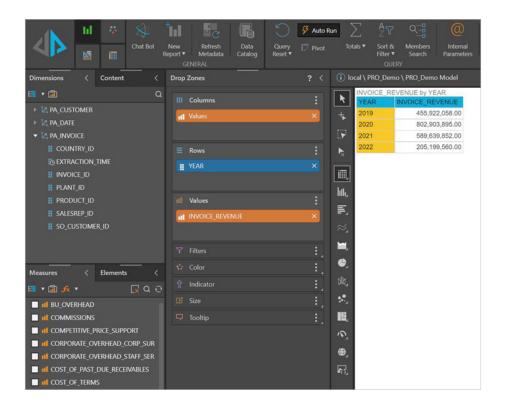
Next select the tables that will be available in the direct query. Note that the "Add Tables" button is greyed out with the direct query option.

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Once the tables have been selected click on the "Data Model" tab and give the model a name. Then select the tables elements to confirm the joins between the tables, similarly the columns and Hierarchies elements can be adjusted as per the standard model functionality.

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Process the model and the tables, and now the dimensions and measure included in the direct query are available in discover. The data is directly queried from the source database each time the discover is run.



#### TIP 2

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option.

## **Direct Query – Creating Custom Tables**

The functionality in the direct query of a data source can be extended to create custom tables from SQL script instead of selecting whole tables or views in the model data flow.

There are many use cases for this feature including migrating reports to Pyramid that where previously based on a complex SQL query bring the data together from several joined tables.

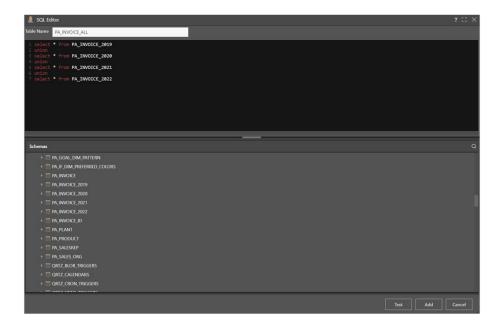
The example here is when a user would like to combine the results sets of 2 or more select statements in a union operation. Let's take the example that there are independent tables for invoices in each financial year. Table named PA\_Invoice\_2019 contains all the invoices for financial year 2019. There is an identically structured table with the invoices for 2020 etc.

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In the query window complete or paste in the SQL query. Then click on the "test" option and if it passes click "add". Note you must give the query a "Table Name" in the dialogue box before testing and saving.

Create a model as in Tip 1,

selecting the server and database then click the box "Direct Query Data Source". Navigate to the "Data Model" tab and the tables element. Click on the "Add a Query"



The new table formed from the custom query then becomes available in your data model. Note the custom query can be combined with whole tables selected in the "Data Flow" and it is possible to add multiple custom queries to the same model.

To edit or delete the query right click on the table name and select the corresponding option from the list.

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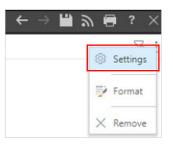
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Abner RihosekFreewheel228.004OnlineIshikariBertha ClaraeHL Bottom Bracket63.981OnlineLa RochelleBarry HammorWomen's Mountain Shorts, S126.933OnlineLaucestonArlyn McIlhargaHL Mountain Frame - Black, 38900.583OnlineLe MansFlorella MorgueSpokes128.004OnlineLos AngelesBeltran HastingsWomen's Mountain Shorts, S126.933OnlineMiddridTye MarlerLL Touring Frame - Yellow, 62391.232OnlineMiguel HidalgeKata GounyRoad-250 Black, 481,728.021OnlineRoubaixDeanna GoodhewML Road-Sext Assembly40.281OnlineStoreAngela BaumannLL Mountain Frame - Black, 42198.933StoreChâteaudunDiandra LukeschML Road Handlebars173.461StoreEdinburghMeris AdameFlat Washer 5161.134StoreLabegeMirella SleemanLL Fork307.643StoreReims		Earle	Snead	Short-Sleeve	Classic Jersey, M	468.81	4	Online	El Paso
Bertha ClaraeHL Bottom Bracket63.981OnlineLa RochelleBarry HammorWomen's Mountain Shorts, S126.933OnlineLauncestonArlyn McIlhargaHL Mountain Frame - Black, 38900.583OnlineLe MansFlorella MorgueSpokes128.004OnlineLos AngelesBeltran HastingsWomen's Mountain Shorts, S126.933OnlineMadridTye MarterLL Touring Frame - Yellow, 62391.232OnlineMiguel HidalgoKata GounyRoad-250 Black, 481,728.021OnlineStaten IslandDeanna GoodhewML Road Seat Assembly40.281OnlineStaten IslandAngela BaumannLL Mountain Frame - Black, 42198.933StoreChâtaaudunDiandra LukeschML Road Handlebars173.461StoreEdinburghMeris AdameFlat Washer 5161.134StoreLabegeMirella SleemanLL Fork307.643StoreReims		Tansy	Bescoby	Women's Mo	untain Shorts, L	237.72	3	Online	Hamburg
Barry HammorWomen's Mountain Shorts, S126.933OnlineLauncestonArlyn MclihargaHL Mountain Frame - Black, 38900.583OnlineLe MansFlorella MorgueSpokes128.004OnlineLos AngelesBeltran HastingsWomen's Mountain Shorts, S126.933OnlineMadridTye MarlerLL Touring Frame - Vellow, 62391.232OnlineMudairdKata GounyRoad-250 Black, 481,728.021OnlineStoten IslandDeanna GoodhewML Road Seat Assembly40.281OnlineStaten IslandAngela BaumannLL Mountain Frame - Black, 42198.933StoreChâteaudunDiandra LukeschML Road Handlebars173.461StoreEdinburghMeris AdameFlat Washer 5161.134StoreLabegeMirella SleemannLL Fork307.643StoreReims		Abne	r Rihosek	Freewheel		228.00	4	Online	Ishikari
Arlyn MclihargaHL Mountain Frame - Black, 38900.583OnlineLe MansFlorella MorgueSpokes128.004OnlineLos AngelesBeltran HastingsWomen's Mountain Shorts, S126.933OnlineMadridTye MarlerLL Touring Frame - Yellow, 62391.232OnlineMadridKata GounyRoad-250 Black, 481,728.021OnlineRoubaixDeanna GoodhewML Road Seat Assembly40.281OnlineStoreBerlinAngela BaumannLL Mountain Frame - Black, 42198.933StoreChâteaudunDiandra LukeschML Road Handlebars173.461StoreEdinburghMeris AdameFlat Washer 5161.134StoreLabegeMirella SleemanLL Fork307.643StoreReims		Berth	a Clarae	HL Bottom Br	racket	63.98	1	Online	La Rochelle
Florella MorgueSpokes128.004OnlineLos AngelesBeltran HastingsWomen's Mountain Shorts, S126.933OnlineMadridTye MarlerLL Touring Frame - Yellow, 62391.232OnlineMiguel HidalgoKata GounyRoad-250 Black, 481,728.021OnlineRoubaixDeanna GoodhewML Road Seat Assembly40.281OnlineStaten IslandNana MolloyMountain Bike Socks, L80.591StoreBerlinAngela BaumannLL Mountain Frame - Black, 42198.933StoreEdinburghDiandra LukeschM.Road Handlebars173.461StoreEdinburghMeris AdameFlat Washer 5161.134StoreLabegeMirella SleemanLL Fork307.643StoreReims		Barry	Hammor	Women's Mo	untain Shorts, S	126.93	3	Online	Launceston
Beltran Hastings         Women's Mountain Shorts, S         126.93         3         Online         Madrid           Tye Marter         LL Touring Frame - Yellow, 62         391.23         2         Online         Miguel Hidalgo           Kata Gouny         Road-250 Black, 48         1,728.02         1         Online         Roubaix           Deanna Goodhew         ML Road Seat Assembly         40.28         1         Online         Staten Island           Nana Molloy         Mountain Bike Socks, L         8059         1         Store         Berlin           Angela Baumann         LL Mountain Frame - Black, 42         198.93         Store         Châteaudun           Diandra Lukesch         MR. Road Handlebars         173.46         Store         Edinurgh           Meris Adame         Flat Washer 5         161.13         4         Store         Labege           Mirella Sleeman         LL Fork         307.64         3         Store         Reims		Arlyn	Mcllharga	HL Mountain	Frame - Black, 38	900.58	3	Online	Le Mans
Tye Marler     LL Touring Frame - Yellow, 62     391.23     2     Online     Miguel Hidalgo       Kata Gouny     Road-250 Black, 48     1,728.02     1     Online     Roubaix       Deanna Goodhew     ML Road Seat Assembly     40.28     1     Online     Staten Island       Nana Molloy     Mountain Bike Socks, L     80.59     1     Store     Berlin       Angela Baumann     LL Mountain Frame - Black, 42     198.93     3     Store     Châteaudun       Diandra Lukesch     ML Road Handlebars     173.46     1     Store     Edinburgh       Meris Adame     Flat Washer 5     161.13     4     Store     Labège       Mirella Sleeman     LL Fork     307.64     3     Store     Reims		Flore	lla Morgue	Spokes		128.00	4	Online	Los Angeles
Kata Gouny     Road-250 Black, 48     1,728.02     1     Online     Roubaix       Deanna Goodhew     ML Road Seat Assembly     40.28     1     Online     Staten Island       Nana Molloy     Mountain Bike Socks, L     80.59     1     Store     Berlin       Angela Baumann     LL Mountain Frame - Black, 42     198.93     3     Store     Châteaudun       Diandra Lukesch     ML Road Handlebars     173.46     1     Store     Edinburgh       Meris Adame     Flat Washer 5     161.13     4     Store     Labège       Mirella Sleeman     LL Fork     307.64     3     Store     Reims		Beltra	an Hastings	Women's Mo	untain Shorts, S	126.93	3	Online	Madrid
Deanna Goodhew         ML Road Seat Assembly         40.28         1         Online         Staten Island           Nana Molloy         Mountain Bike Socks, L         80.59         1         Store         Berlin           Angela Baumann         LL Mountain Frame - Black, 42         198.93         3         Store         Châteaudun           Diandra Lukesch         ML Road Handlebars         173.46         1         Store         Edinburgh           Meris Adame         Flat Washer 5         161.13         4         Store         Labège           Mirella Sleeman         LL Fork         307.64         3         Store         Reims		Tye N	Aarler	LL Touring Fr	ame - Yellow, 62	391.23	2	Online	Miguel Hidalgo
Nana Molloy         Mountain Bike Socks, L         80.59         1         Store         Berlin           Angela Baumann         LL Mountain Frame - Black, 42         198.93         3         Store         Châteaudun           Diandra Lukesch         ML Road Handlebars         173.46         1         Store         Edinburgh           Meris Adame         Flat Washer 5         161.13         4         Store         Labège           Mirella Sleeman         LL Fork         307.64         3         Store         Reims		Kata	Gouny	Road-250 Bla	ick, 48	1,728.02	1	Online	Roubaix
Angela Baumann     LL Mountain Frame - Black, 42     198,93     3     Store     Châteaudun       Diandra Lukesch     ML Road Handlebars     173,46     1     Store     Edinburgh       Meris Adame     Flat Washer 5     161,13     4     Store     Labège       Mirella Sleeman     LL Fork     307,64     3     Store     Reims		Dean	na Goodhew	ML Road Sea	t Assembly	40.28	1	Online	Staten Island
Diandra Lukesch ML Road Handlebars 173.46 1 Store Edinburgh Meris Adame Flat Washer 5 161.13 4 Store Labège Mirella Sleeman LL Fork 307.64 3 Store Reims		Nana	Molloy	Mountain Bik	e Socks, L	80.59	1	Store	Berlin
Meris Adame         Flat Washer 5         161.13         4         Store         Labège           Mirella Sleeman         LL Fork         307.64         3         Store         Reims		Ange	la Baumann	LL Mountain	Frame - Black, 42	198.93	3	Store	Châteaudun
Mirella Sleeman LL Fork 307.64 3 Store Reims		Diano	dra Lukesch	ML Road Har	dlebars	173.46	1	Store	Edinburgh
		Meris	s Adame	Flat Washer 5		161.13	4	Store	Labège
Dorothea Arckoll Guide Pulley 80.57 2 Store Tulsa		Mirel	la Sleeman	LL Fork		307.64	3	Store	Reims
		Doro	thea Arckoll	Guide Pulley		80.57	2	Store	Tulsa

The filter value will default to the value when the Discover object was last saved. Use the 'Initial Selection Mechanism' in Load Time option, to change the default filter value. Select the Filter Settings option to change the style and behaviour of the Filter.



Select Load Time > update Initial Selection Mechanism to = "Last Member" ('First Member' is an option as well).

Typically, Date attributes in a model are updated as new transaction data is appended to the model. This means additional elements are added to the Date attribute. In this example the 'last member' option will mean the Discover object will default to the latest date.

Slicer Settings	
Туре	Load Time Settings
Load Time	Initial Selection Mechanism
Slicer Elements Limit	Last Member
Search Type	🔲 🙀 Remember user's last selection
Other Options	Apply to slicer if cascaded
Non Empty Filter	

4 Click on Save and Close Discover Report.



Open Discover report and notice that Date within filter is the latest date available in the slicer.

🏷 Date	2021-12-30	•			
Sales, Quantity by Custom	er Name, Product, Channel, City (2021-	12-30)			
Customer Name	Product	Sales	Quantity	Channel	City
Rubina Saunders	LL Road Frame - Black, 44	436.97	2	Online	Carlsbad
Bernadene MacMeanma	Half-Finger Gloves, L	81.08	3	Online	East End
Gael Jansky	Short-Sleeve Classic Jersey, S	30.60	1	Online	El Aguacate
Tansy Lapish	LL Mountain Frame - Black, 44	1,256.12	4	Online	Ishigaki
Scot Yewman	HL Touring Frame - Blue, 54	283.12	2	Online	Jamaica
Yorker Albarez	Metal Sheet 3	210.00	3	Online	Kashima
Bradan Simak	LL Mountain Frame - Black, 40	695.19	4	Online	Kashiwazaki
Conny De Blasio	ML Road Frame-W - Yellow, 38	313.98	1	Online	Kinloch

