Self Service BI

DigDash Enterprise provides a table editor toolbar allowing to modify the tables and cross tables in real time: adding columns or total, modifying sorts, styles,...
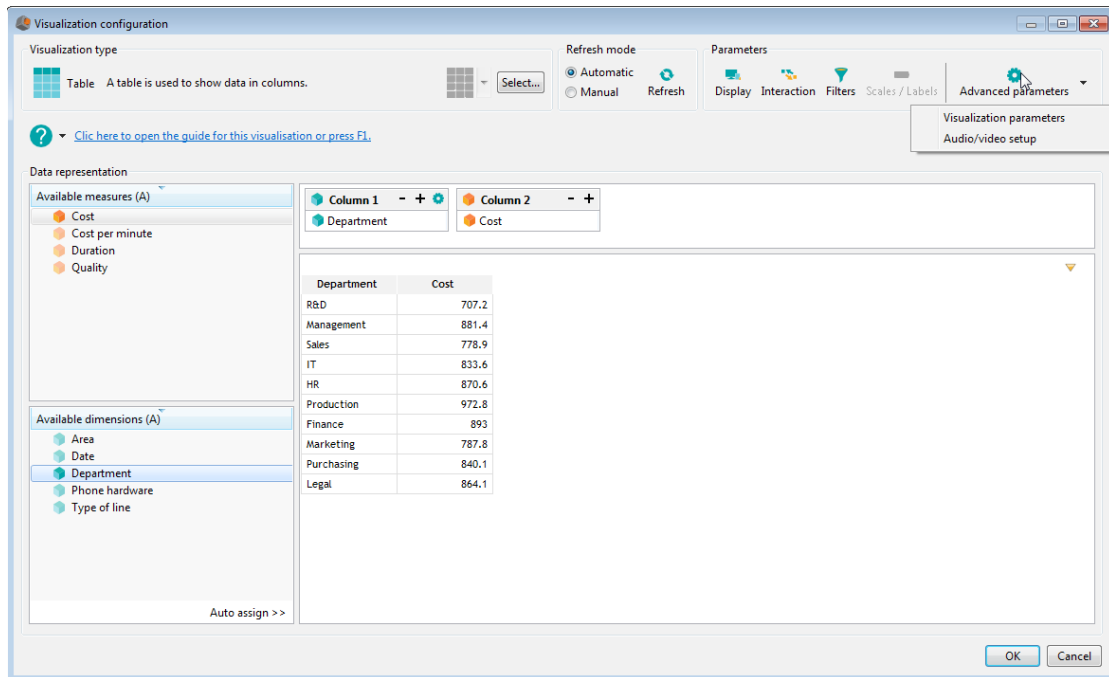Modifying table becomes easy for everyone as it doesn't require any changes in the information wallet configuration.
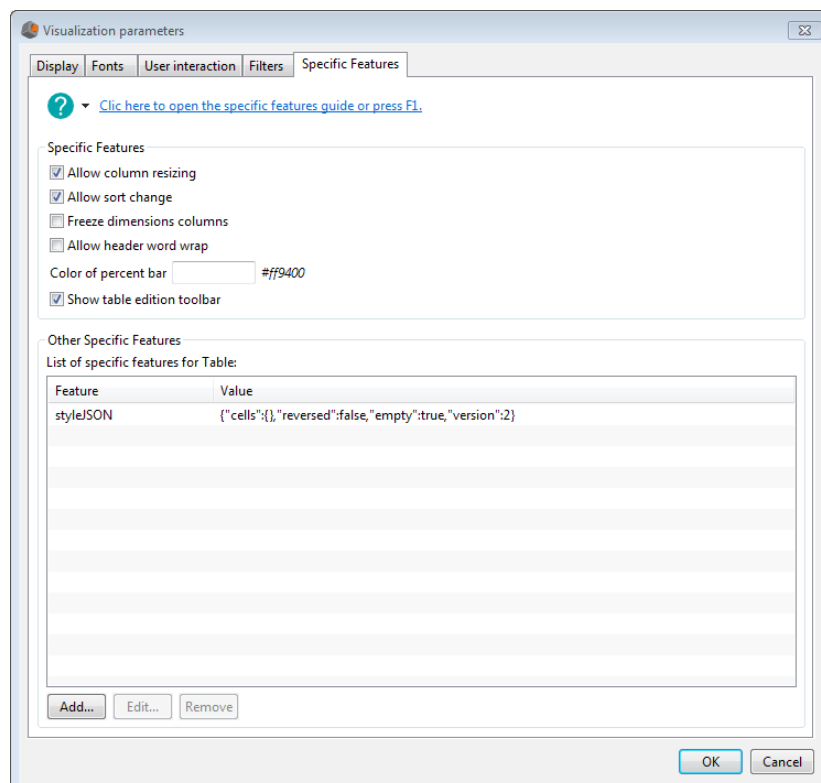
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I. SETTING UP SELF SERVICE BI

To use the "Self Service BI", open the **Visualization configuration** dialog box, then click **Advanced Parameters** and **Visualization Parameters**.

Open the **Specific Features** tab and check the **Table editor toolbar** box:

II. MODIFYING TABLE CONTENT

When viewing the table, the chart is displayed on the right and the table editor toolbar on the left:

Department	Cost
R&D	707.2
Management	881.4
Sales	778.9
IT	833.6
HR	870.6
Production	972.8
Finance	893
Marketing	787.8
Purchasing	840.1
Legal	864.1

The table editor toolbar shows the list of dimensions and measures available in the data model. It also provides a set of tools allowing to export or save your table. Dimensions having hierarchies or drill paths are followed by … Click the dimension to display available hierarchies:

II.1 Adding a column

Drag and drop the dimension or measure on the column header before which you want to insert the column.
If you want to add a hierarchy level of a dimension, click the dimension to select the appropriate level.

Note: if you try to drop an object (measure or dimension) on an unauthorized place, a no-entry sign will be displayed (for example, if you try to add a measure before a dimension).

You can also add a column using right click :

Right click the header of the column before or after the column you want to add and select **Insert Dimension (after** or **before)** or **Insert Measure (before** or **after)** then select the measure or dimension you want to add. If the dimension has hierarchies, the root level is automatically added (to add a hierarchy level, drag and drop it from the dimensions list on the left).
The **Insert a measure** menu is displayed only if you select a measure header or if you select the last dimension of the table (measures can only be added at the end of the table).
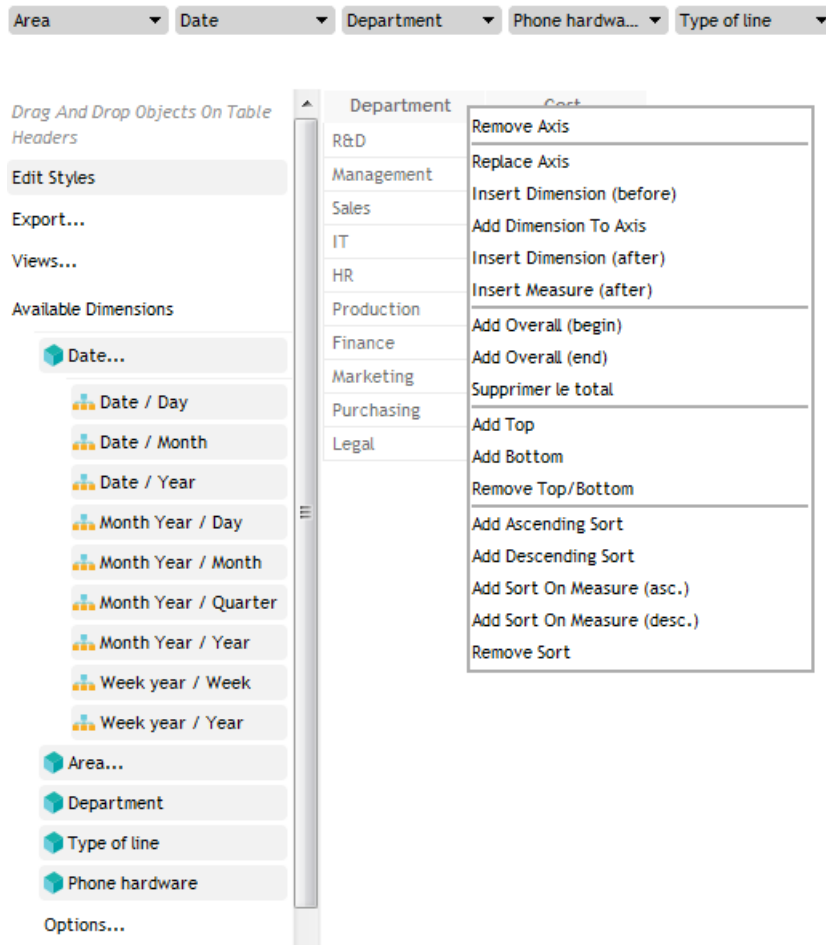
To add a dimension on the selected axis, select **Add dimension To axis**.
If you want to replace an axis, select **Replace Axis** then select the dimension.

II.2 Adding a formula:

To add a formula, drag and drop "Formula..." at the end of the measures list.
A dialog box shows up. Enter the name and the formula:
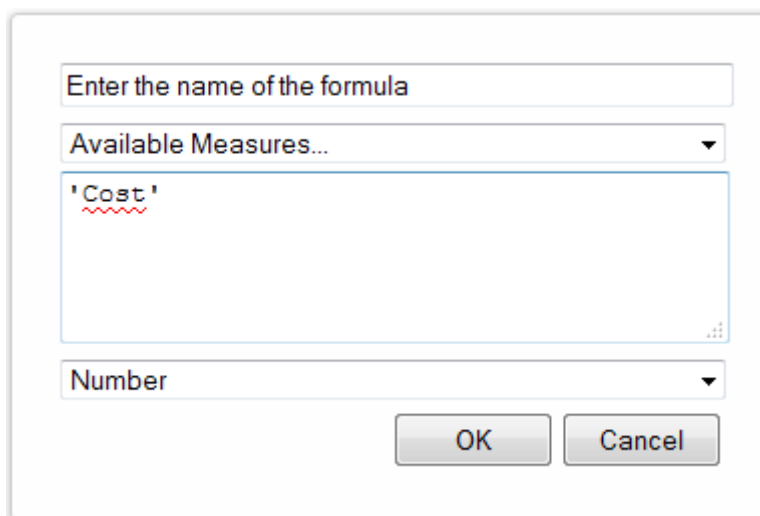
You can select measures from the **Available Measures...** drop-down list.
You can also select a format in the drop-down list at the bottom of the dialog box.

Click **OK** to add the new formula at the end of the table.

II.3   Adding a transformer

Transformers can be added on measures to display values for the previous year, previous month, previous week or the previous day.
To add a transformer, click **Options...** under Formula, then drag and drop the transformer on the appropriate measure.
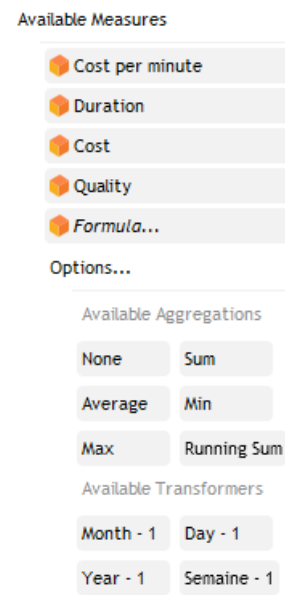
Enter the measure name and click **OK**. The measure is added to the right of the transformed measure.

II.4   Removing a column

Drag and drop the column header on the table toolbar.
You can also right click the column header and select **Remove Axis** or **Remove Measure**.
In case several dimensions are on the same axis, you can remove on of these dimensions by selecting **Remove Dimension**.

II.5 Modifying axes properties

II.5.1 Adding or removing a total

Right click the column header then select **Add Overall (begin)** or **Add Overall (end)**.
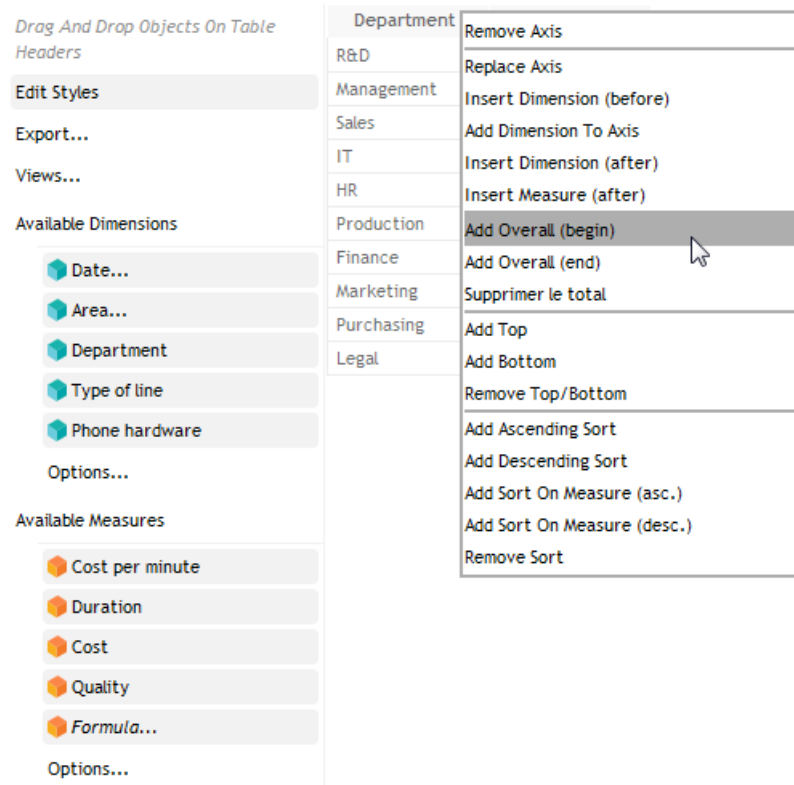
Adding overall values is also available from the dimensions options: click **Options...** below the dimensions list, then drag and drop **Total (begin)** or **Total (end)** on the dimension:

To remove a total, right click the dimension and select **Remove Total**.

II.5.2   Adding or removing a Top/Bottom

Right click the column header then select **Add Top** or **Add Bottom** then select the measure on which you want to apply the top or bottom. Finally, enter the number of values of your top/bottom.
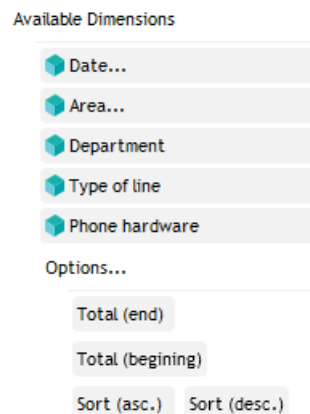To remove a Top/bottom select **Remove Top/Bottom/Range**.
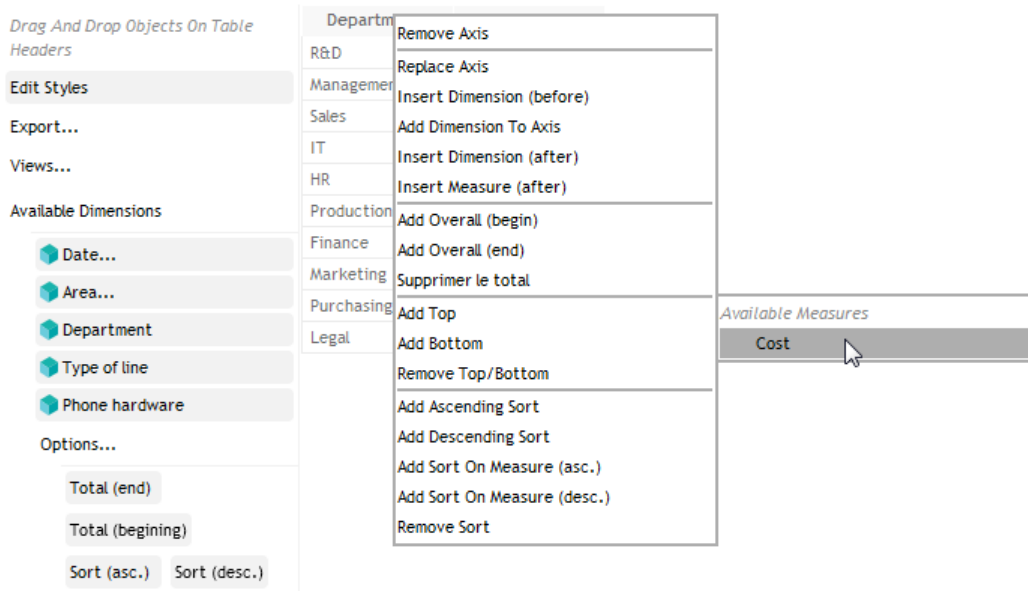
II.5.3   Selecting a range of values

To select a range of values for a measure on a specific dimension, right click the dimension header, then select **Add range**. The list of measures table is displayed.
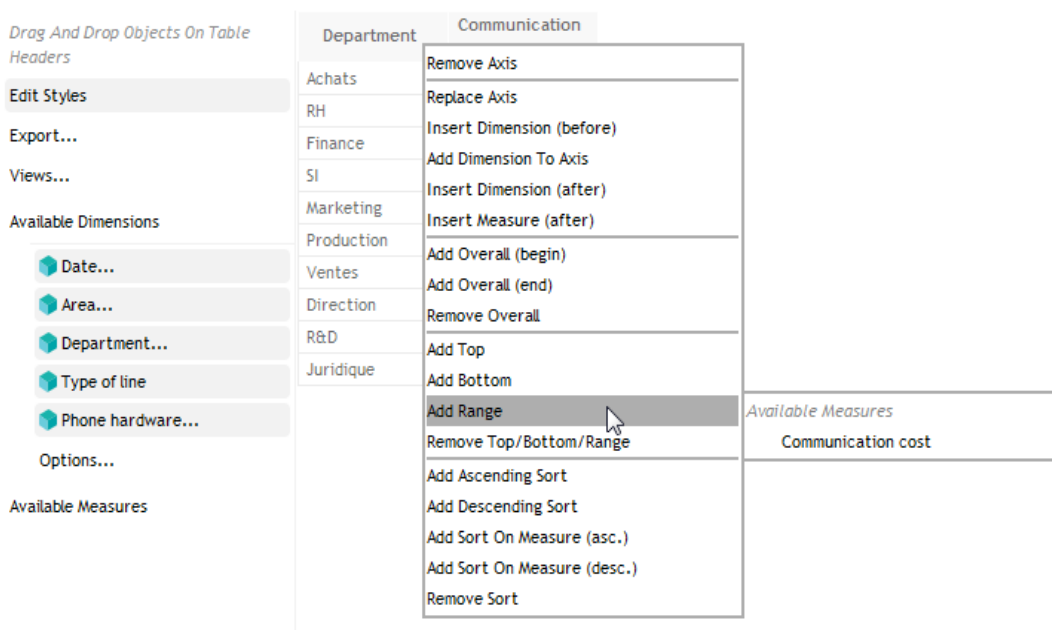
Select the measure to use then the range of values.

Department	Communication cost
Achats	808.8
RH	855.4
Finance	819.5
SI	708.6
Marketing	824.7
Production	865.6
Ventes	908.3
Direction	815.8
R&D	877.5
Juridique	883.7

Enter the minimal value:

820

Enter the maximal value:

880

OK   Cancel

Click **OK** to display the resulting table:

Department	Communication cost
RH	855.4
Marketing	824.7
Production	865.6
R&D	877.5

To remove a range of values, select **Remove Top/Bottom/Range**.

II.5.4   Adding or removing a sort

Right click the column header then select **Add Ascending Sort** or **Add Descending Sort**. If you want to add a measure sort, select **Add Sort on Measure (asc.)** or **Add Sort on Measure (desc.)** then select the measure.

Adding sort is also available in the dimensions options. Click **Options...** below the dimensions list then drag and drop **Sort (asc.)** or **Sort (desc.)** on the dimension.

Available Dimensions

- Date...
- Area...
- Department
- Type of line
- Phone hardware

Options...

Total (end)

Total (begining)

Sort (asc.)   Sort (desc.)
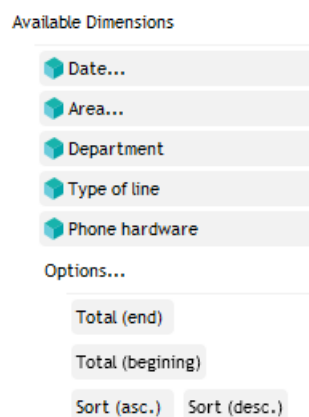
To remove a sort, right click the column header and select **Remove Sort**.

II.5.5 Modifying measure aggregation

Right click the measure header then select **Change aggregation** and choose one of the available functions: Sum, Average, Min, Max or Running Sum.
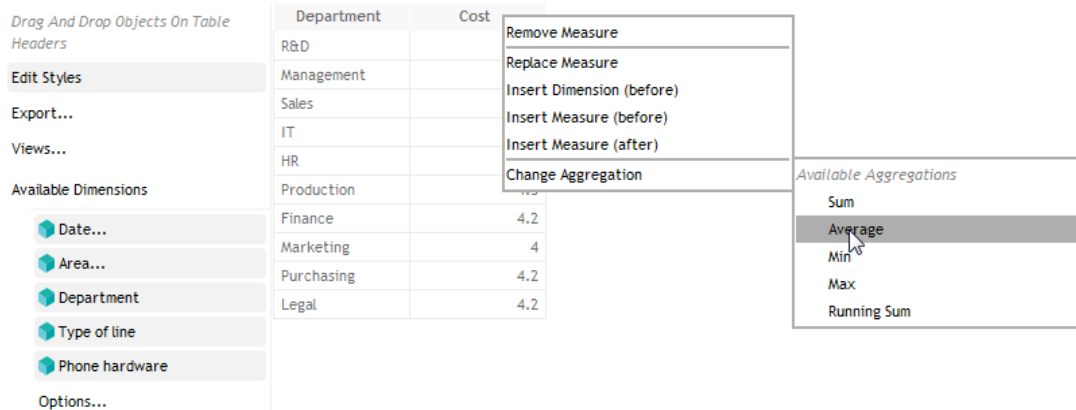
You can also change the aggregation by selecting it in the measures options. Click **Options...** below the measures list, then drag and drop the aggregation on the measure header.
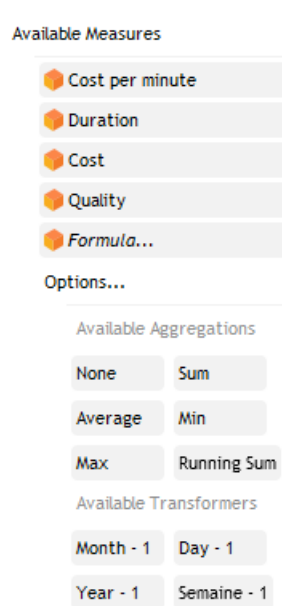
II.5.6 Modifying column format

Right click the measure or continuous dimension header (date dimension for example), then select **Change format** and select the desired format.

III. MODIFYING TABLE STYLES

To modify the tables styles, click **Edit Styles** at the top of the toolbar, then click the column header to modify the column style.

Note: click **Edit styles** again to switch back the the table edition.

➢ To modify a row, column or cell style: select the cell, right click and choose the element you want to modify (cell, row or column) then the modification type: background, cell or border.

➢ You can also:

→ Hide a row or a column: select row or column, then select **Hide row** or **Hide column**.

→ Change the text of a cell: select cell, then **Text** and enter the text. The text can include variable like ${Filter Dim} where Dim is the filtered dimension. At display, the variable is replaced by the filter value on the "Dim" dimension.

→ Insert a row: select **Insert Row**, then indicate whether the row must be placed before or after the current row. Enter values of each row cell.

Drag And Drop Objects On Table Headers

Edit Styles

Export...

Views...

Available Dimensions

- 🔷 Date...
- 🔷 Area...
- 🔷 Department
- 🔷 Type of line
- 🔷 Phone hardware

Options...

Available Measures

- 🔶 Cost per minute
- 🔶 Duration
- 🔶 Cost
- 🔶 Quality
- 🔶 *Formula...*

Options...

Department	Cost
R&D	
Mana	
Sales	
IT	
HR	
Produ	
Finance	4.2
Marketing	4
Purchasing	4.2
Legal	4.2

Table
Row (row_0)
Column (Department)
Cell (row_0,Department)
Insert row
Reset all table styles
Reset all added lines

Background
   Background Color...

Text
   Text Color...
   Text Align...
   Font...

Border
   Top Border...
   Bottom Border...
   Left Border...
   Right Border...

Options
   Hide row
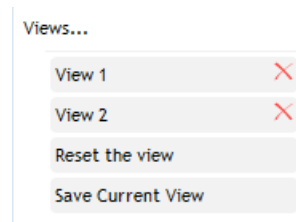   Row Height...
   CSS...
   Reset styles

IV. SAVE A TABLE

IV.1 Save a view

To save the current view of your table, click **Views...** then **Save Current View**. Enter the view name, then click **OK**.
The view is saved in the flow. To display a view, click on its name.
To remove a view, click the red cross besides the view name.

IV.2 Export a table

To export a table, click **Export...** then select the export type: PDF, PPT, XLS, CSV or flow. If you export your table as a flow, this one is added to the user or role wallet (same wallet as the flow you modify).

IV.3 Reset the view

To display the initial table again, click **Views...** then **Reset the view**