ESR Business Intelligence

Tables, Pivot Tables and Graphs

Introduction

The results of an analysis can be displayed in three primary ways, as a Table, a Pivot Table, or a Graph. These three views allow a user to display the results in different ways depending on the type of information to be displayed and highlighted. This guide will highlight the core features within Tables, Pivot Tables and Graphs, enabling the user to create and customise each to his/her requirements.

Adding a Table

A table is normally the default view to display the results of an analysis when navigating to the results tab. To view the results of an analysis as a table:

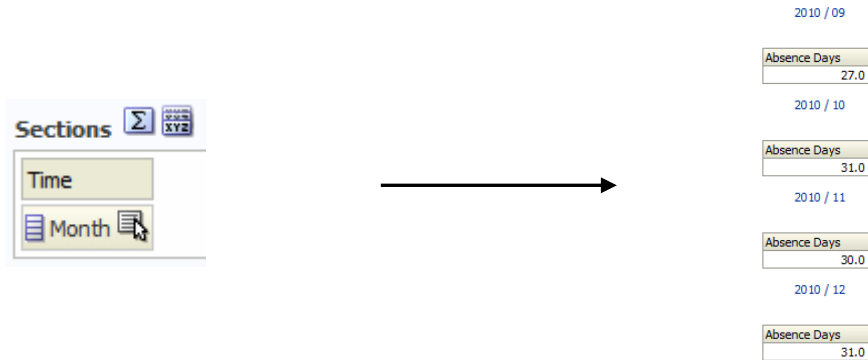| Step	Screen	Description
1	Time Absence Facts Month Absence Days	Select the required columns in the Criteria tab
2	Criteria Results	Click on the 'Results' tab
3	Compound Layout — Title / Table — Month / Absence Days: 2010 / 09 → 27.0, 2010 / 10 → 31.0, 2010 / 11 → 30.0, 2010 / 12 → 31.0	The results of the analysis will be displayed in the Compound Layout. Two views will be shown, a Title view and a Table view.

The table can then be customised to display the results as required. Click on the ✏ icon to open the table in edit view. Within the Layout area, drag and drop functionality allows the columns to be moved around or excluded from the table to display the results as desired.

Electronic Staff Record

In this example the month column has been moved into the 'Sections' area resulting in each month being displayed as a separate section in the table.


To change the format of each column within the table:

Step No.	Screen	Description
1		Click the icon within the column and select either Format Headings or Format Values depending on the area of the graph to be modified
2		Use the Edit Format window to change the format of the Heading/Values as required
3	Editing from: "Compound Layout" Done Revert	Click 'Done' from the upper right corner options
4		The results will now be shown in the Compound window of the results tab. In this example the Headings have been set to **Bold**.

Adding Totals

Within the 'edit view' of a table, the option is available to add a Grand Total to table. Click on the ∑ icon and select 'After' or 'Before' to add a Grand Total row to the table.
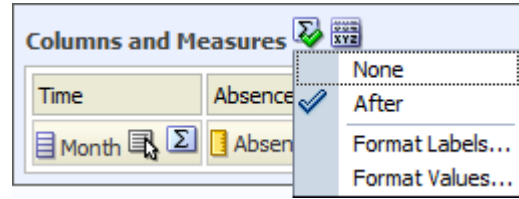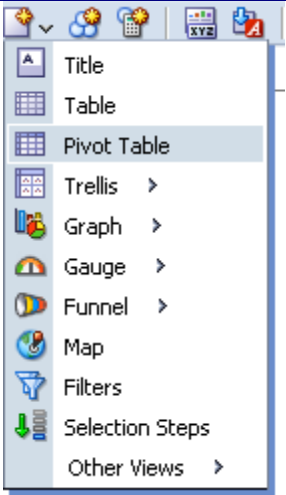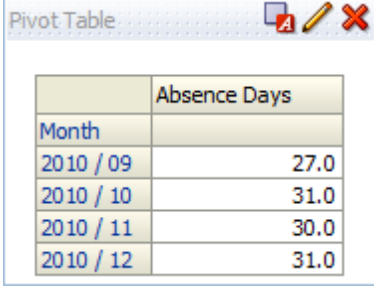
Sorting

To sort a column within a table from the compound view, right click on the column name, select 'Sort Column' and choose the sort type required.
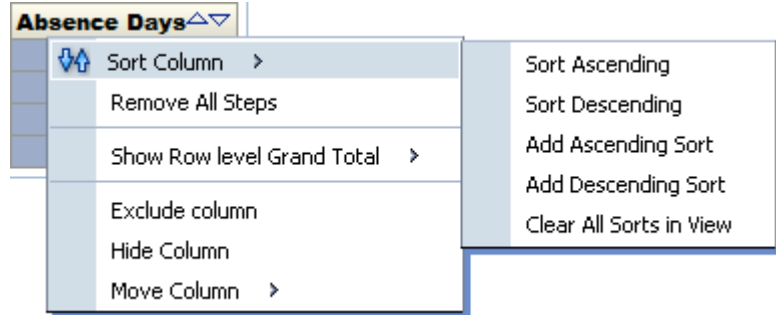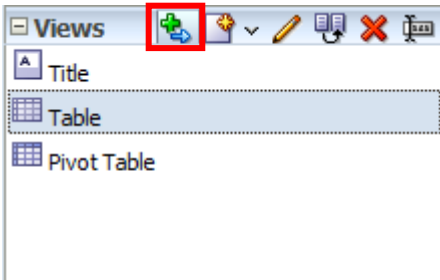
Pivot Tables

A Pivot Table in ESR BI is similar to a standard Table in that these both allow drag and drop functionality either in the compound view or edit view, sorting, drilling and conditional formatting. To add a Pivot Table to the results of an analysis:

| Step	Screen	Description
1		Click the icon within the top toolbar and select Pivot Table.
2		A Pivot Table is then added to the compound view of the results. You should see it is similar to a standard table

To remove (but not delete) any view (Table, Pivot Table, Graph etc) from the compound layout, click the ✖ icon in the upper right corner of the view and it will be moved to the

'Views' window in the lower left corner of the screen. In the example below a Pivot Table has been added and the Table view removed from the Compound Layout. To add a view back to the compound layout, click the ![icon] icon and the view will re-appear in the compound layout.

The primary difference between tables and pivot tables is that within the edit view of a pivot table, Rows are available as a drop target as well as Columns and Measures, whereas in a Table edit view Columns and Measures are in the same drop target and Rows is not available. Being able to drag and drop columns into Rows, Columns and Measures enables greater flexibility when displaying data.

Example Edit View of a Pivot Table:
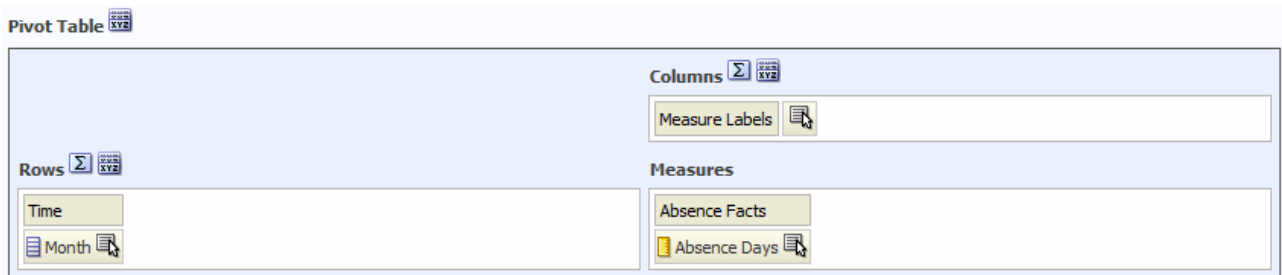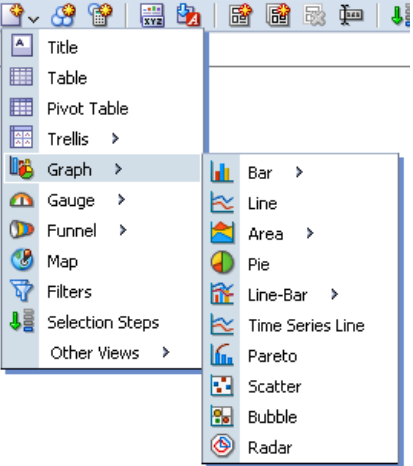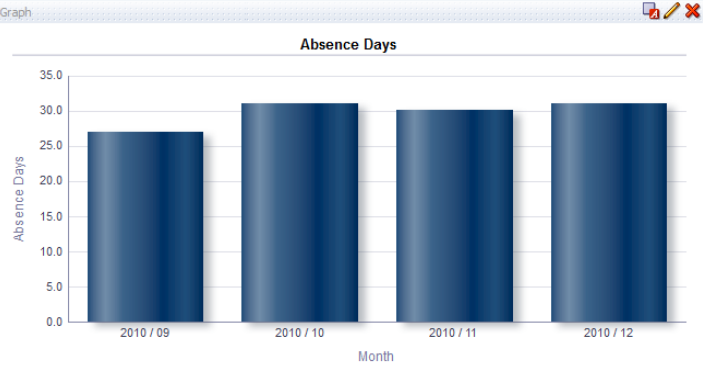
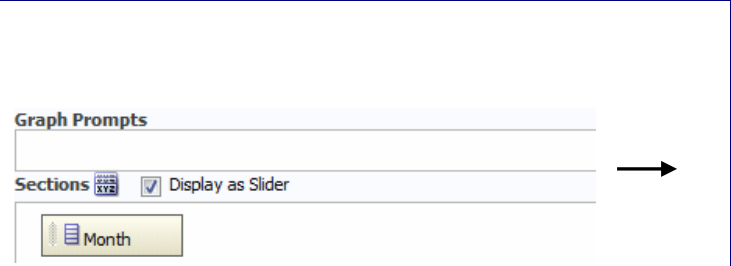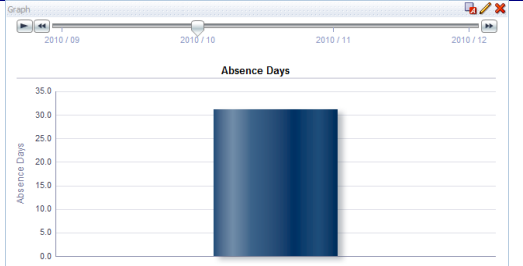

Example Edit View of a Table:

Also, the ability to turn off column names is not available within a table whereas it is within a pivot table.

Graphs
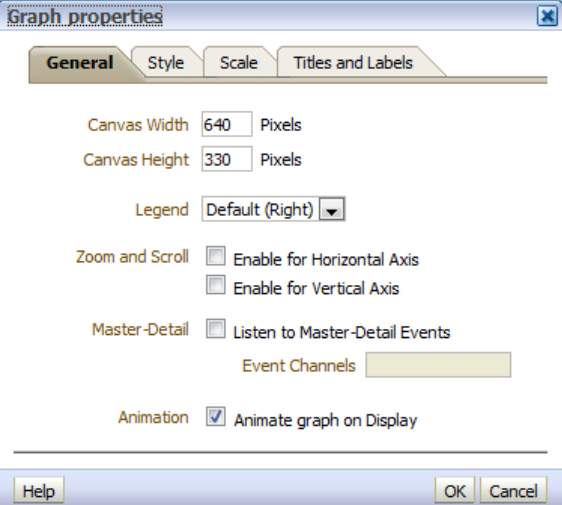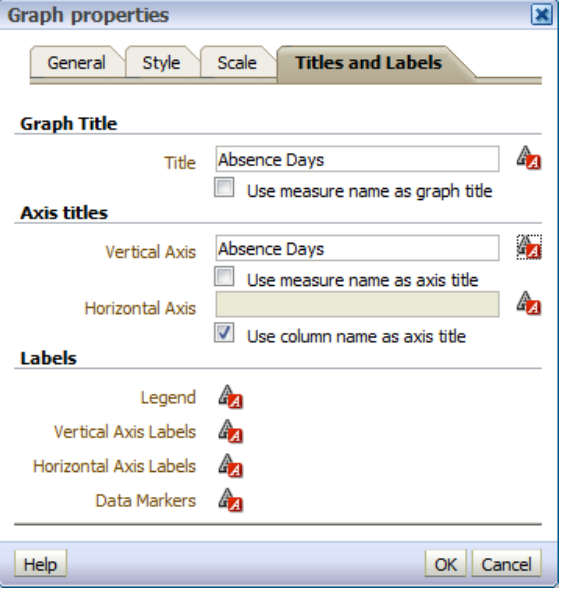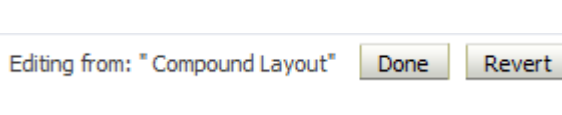Graphs can be used for various types of analysing and displaying data. To add a graph to an analysis:

Step	Screen	Description
1	Title Table Pivot Table Trellis › Graph › Bar › Gauge › Line Funnel › Area › Map Pie Filters Line-Bar › Selection Steps Time Series Line Other Views › Pareto Scatter Bubble Radar	Click the icon within the top toolbar and select Graph. Then select the type of graph to be added to the compound view
2	Graph — Absence Days bar chart (Month: 2010 / 09, 2010 / 10, 2010 / 11, 2010 / 12)	A Graph is then added to the compound view of the results.

Click on the icon to enter the Edit View of the graph. The layout window is similar to a Table layout except the drop targets are now Measures and Bars (or similar depending on the graph type). In the example below the month dimension has been moved to the sections drop target and 'Display as Slider' has been enabled. This has resulted in the graph now reflecting the month that has been selected on the slider above.

| Edit View	Compound View
Graph Prompts **Sections** ☑ Display as Slider Month	Graph — Slider (2010 / 09, 2010 / 10, 2010 / 11, 2010 / 12) Absence Days bar chart

To edit the properties of the graph:

Step No.	Screen	Description
1		Click the [icon] icon within the top toolbar to open the Graph properties window.
2		Select 'Title and Labels' tab to alter the titles as required. Un-tick the 'use measure name as graph title' and enter the required text. The format of the titles can also be changed by clicking on the [icon] icon
3		Click 'Done' in the upper right corner to return to the compound layout view.

Titles

Whenever a new view (a table or graph etc) is added to the results of an analysis, a 'Title' view is also added. To edit this click on the ✏️ icon and change the parameters as required. In this example the title caption has been set to 'Absence Totals' and a subtitle added. To change the format of titles, click on the 🅰️ icon. A preview is