

Tips & Tricks




Simple and Quick Tips & Tricks for getting the most out of nVISION On Demand

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1. Sorting — sounds easy... and it is!

People don't find this right away. If you are looking for the highest value or smallest quantity, sorting may be just what you are looking for. Once you've created your report, you are given the ability to sort by any measure you add to the report. Just click on the little blue button in the header of each column and your report will re-order itself. No more "Expand the selection" message because you haven't selected the right data.


Click once for Ascending, a second time for Descending and a third to set it back to default.

Salesperson	Measures	Salesperson	Measures	Salesperson	Measures
Salesperson	 Sales	Salesperson	 Sales	Salesperson	 Sales
Aaron Bright	483,605.75	Carl Hillar	13,910.38	Rachel Doyle	1,692,250.95
Carl Hillar	13,910.38	Linda Beasley	175,498.94	Judy Lennon	588,373.67
Carol Ollens	488,885.85	Edward Leighton	257,550.75	Carol Ollens	488,885.85
Dale Russell	377,478.28	Dale Russell	377,478.28	Aaron Bright	483,605.75
Edward Leighton	257,550.75	Aaron Bright	483,605.75	Dale Russell	377,478.28
Judy Lennon	588,373.67	Carol Ollens	488,885.85	Edward Leighton	257,550.75
Linda Beasley	175,498.94	Judy Lennon	588,373.67	Linda Beasley	175,498.94
Rachel Doyle	1,692,250.95	Rachel Doyle	1,692,250.95	Carl Hillar	13,910.38

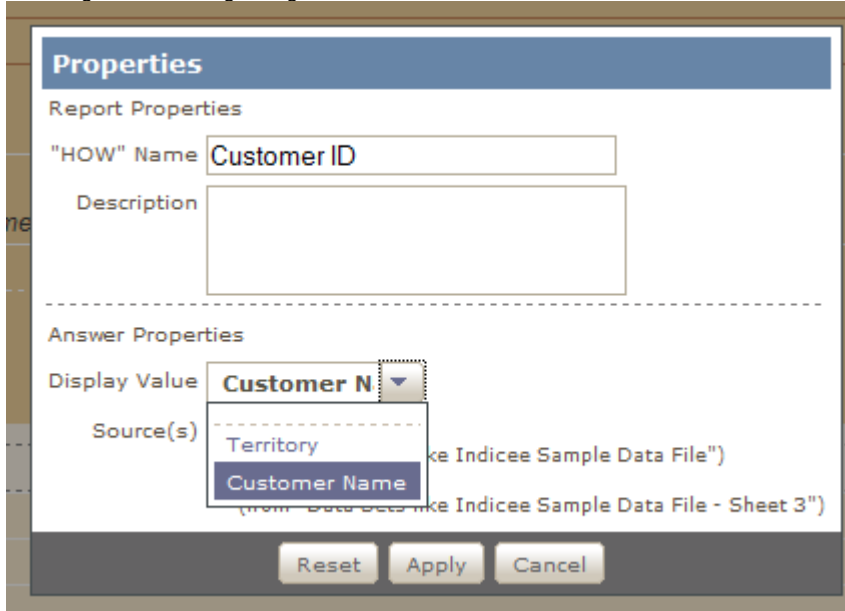
2. Displaying a value other than your ID column

OK, so you've created your data mart, and you've got your data organized just how you want it, but you don't want your Customer ID, Salesperson ID or any ID as your display value — you want to display the customer name, salesperson name, etc. To display the customer name, just edit the data mart and change the display value to any of the properties listed under the Customer ID.

Go to edit data mart. In the Preview Data Mart, click the "i" button for the ID field you want to change the display value for.

City	
Customer ID	
Territory	
Customer Name	
Salesperson	

You will get the following dialog box:

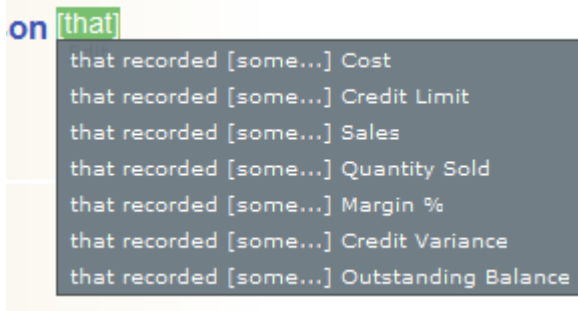


Now, you can click the “Display Value” drop down and choose Customer Name. The values that are listed here are all properties of the level you’ve chosen.

3. Creating a Top N Report

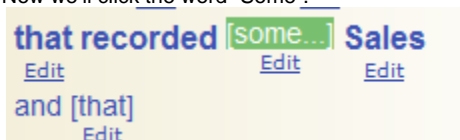
One of the most common things people ask to do is to filter for the top performers (or bottom for that matter). This is traditionally called a Top N Report. Doing this with Indicee is very simple, and can lead to some powerful reports.

In this example, we are only interested in the top 5 sales people. To do this, we will use the built-in selection tool in the report editor. Just click the word “that” in the How section of your report

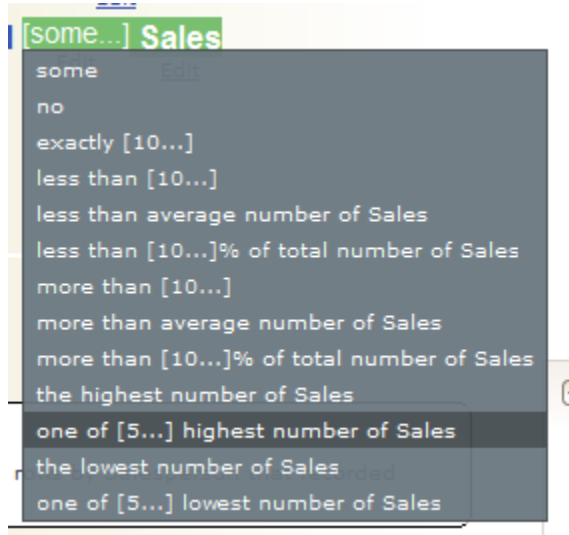


We are now presented with options for each of the measures available. Here we are using “Sales”.

Now we'll click the word “Some”.



Here we will use "One of [5..] highest number of Sales", but we could also choose the lowest, creating a "Bottom N" Report.



Once we have selected this, we can change the number 5 to any number we wish. Our report will now show only the top 5 salespersons by sales.