

Data Element Tutorial

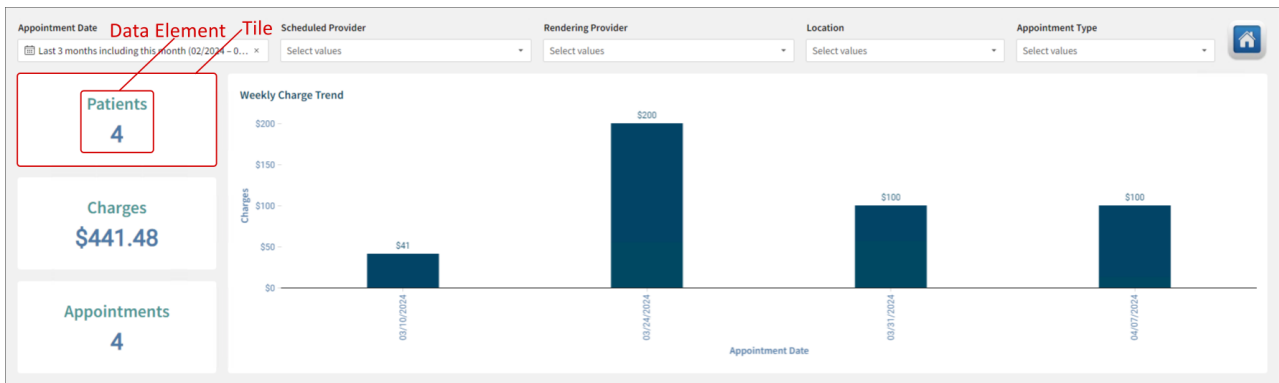
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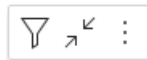
Data Element Tutorial





Path: Tools > Reporting

Data elements are the data visualizations contained in the tiles. They can be KPIs, Charts, or tables.



Hover your mouse over a data element to interact with it. The following options are available at the top right:



- **Filters**  : Applies filters to the element's data source. The icon shows a suffix  that indicates the number of filters or controls affecting the element.
- **Maximize element**  : Displays the element full settings, including its type, data source, format, and marks.
- **Menu**  :
 - **Export**: Downloads the element or its data.
 - **Refresh data**: Checks for changes from the data source and updates the information accordingly.

Note: Keep in mind that all changes performed on the reports or dashboards from OP do not alter the base reports or dashboards. Data elements revert to their original status by clicking the **Reset** button at the bottom right or by navigating back to the report or dashboard from the **Practice Analytics** home.

Drill Down

Follow these steps to drill down through data:



1. Right click one of the following parts of a chart:
 - A bar from a bar chart.
 - An area from an area chart.
 - A point from a line chart.
 - A segment from a pie or doughnut chart.
2. Select **Drill down**. You can also double click on the part of the chart.
3. Select a column to drill down.

Follow these steps to return to the previous level of data:


1. Right click on any part of the chart.
2. Select **Drill up**.
3. Click the first option, the name of the original column.





Manage Bookmarks

Follow these steps to manage bookmarks on a report or dashboard:

1. Interact with a Data Element in any of the following ways:
 - Apply a filter.
 - Drill down.
 - Reorder table columns.
 - Hide or delete table columns.
2. Click the **Bookmark**  button.
3. Click **Save as New Bookmark**.
4. Enter the bookmark name.
5. Indicate whether the report or dashboard must load this bookmark by default by checking the **Always view bookmark by default on opening the document** box.
6. The **Bookmark**  button changes to a green color to indicate that there is at least one bookmark.

Additional actions

After adding at least one bookmark, you can perform the following actions by clicking the **Bookmark**  button:

- **Clear bookmark:** Select **Clear Bookmark** to delete the bookmark.
- **Update bookmark:** Click **Update with current changes** after making an additional interaction with a data element to apply the latest changes to the existing bookmark.
- **Save new bookmark:** Click **Save as new bookmark** and enter the name of the new bookmark to save the current state of data elements.
- **Manage bookmarks:** Click Manage bookmarks to show the bookmark panel to the right. This panel allows you to perform the following actions:
 - Click the **Explorations** Tab to view and navigate to the interactions you performed on the data elements.
 - Click a bookmark from the list under **PERSONAL BOOKMARKS** to load it.
 - Click the **Ellipsis**  next to the Bookmark and select **Set as default** to make the bookmark load by default.
 - Click the **Ellipsis**  next to the Bookmark and select **Remove as default view** to clear the default behavior.
 - Click the **Ellipsis**  next to the Bookmark and select **Edit Name** to change the rename the bookmark.
 - Click the **Ellipsis**  next to the Bookmark and select **Delete** to clear the bookmark.