

# HOW TO ADD A SORT

## **METHOD I:** Computed Sort

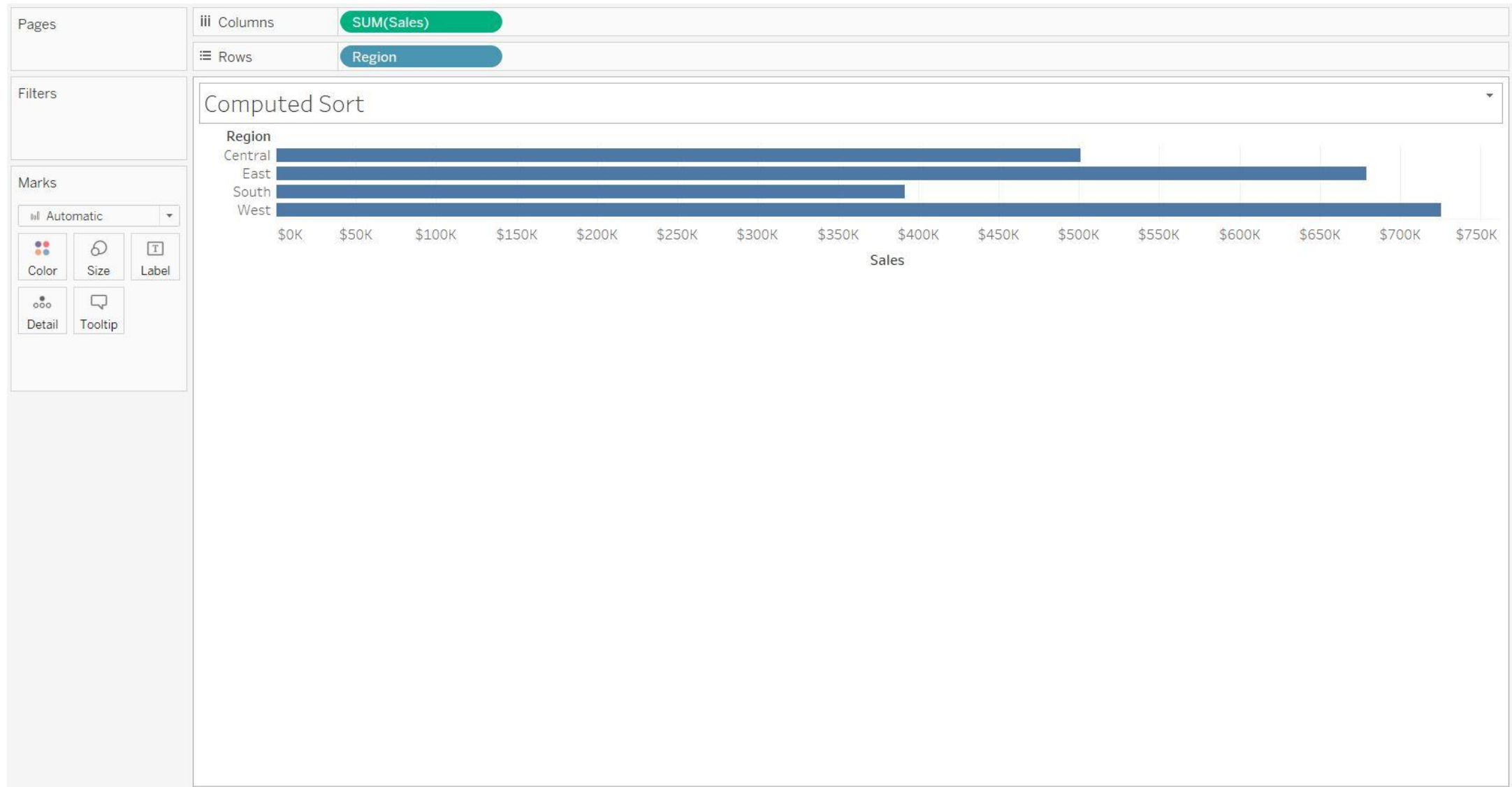
Sort order will change based on the changes in the underlying data

## **METHOD II:** Manual Sort

The manually sorted members will retain their position and the sort order will not change based on the changes in the underlying data

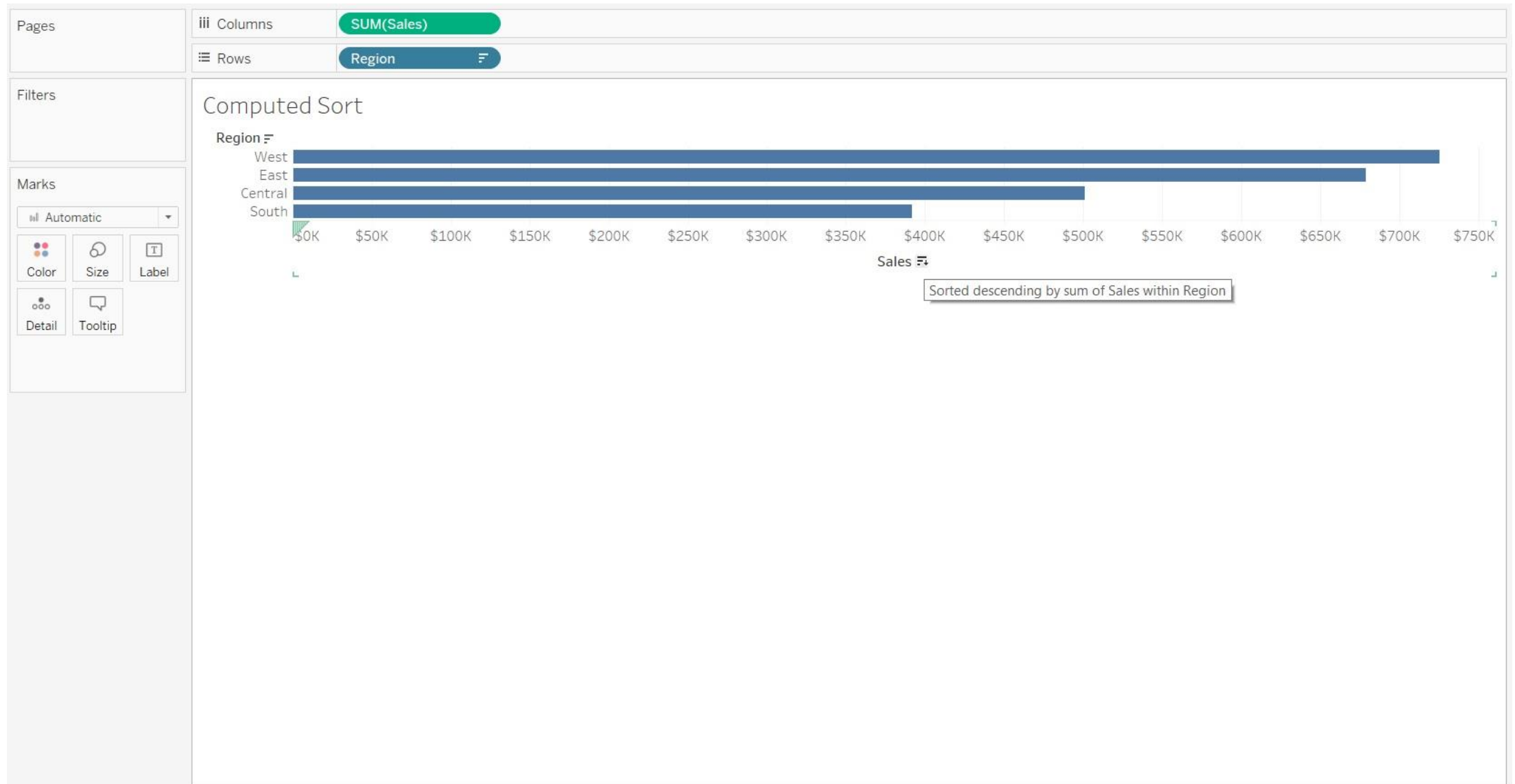
# METHOD I - COMPUTED SORT

**STEP 1:** Assume that we have a Bar Chart view of Sales Vs Region



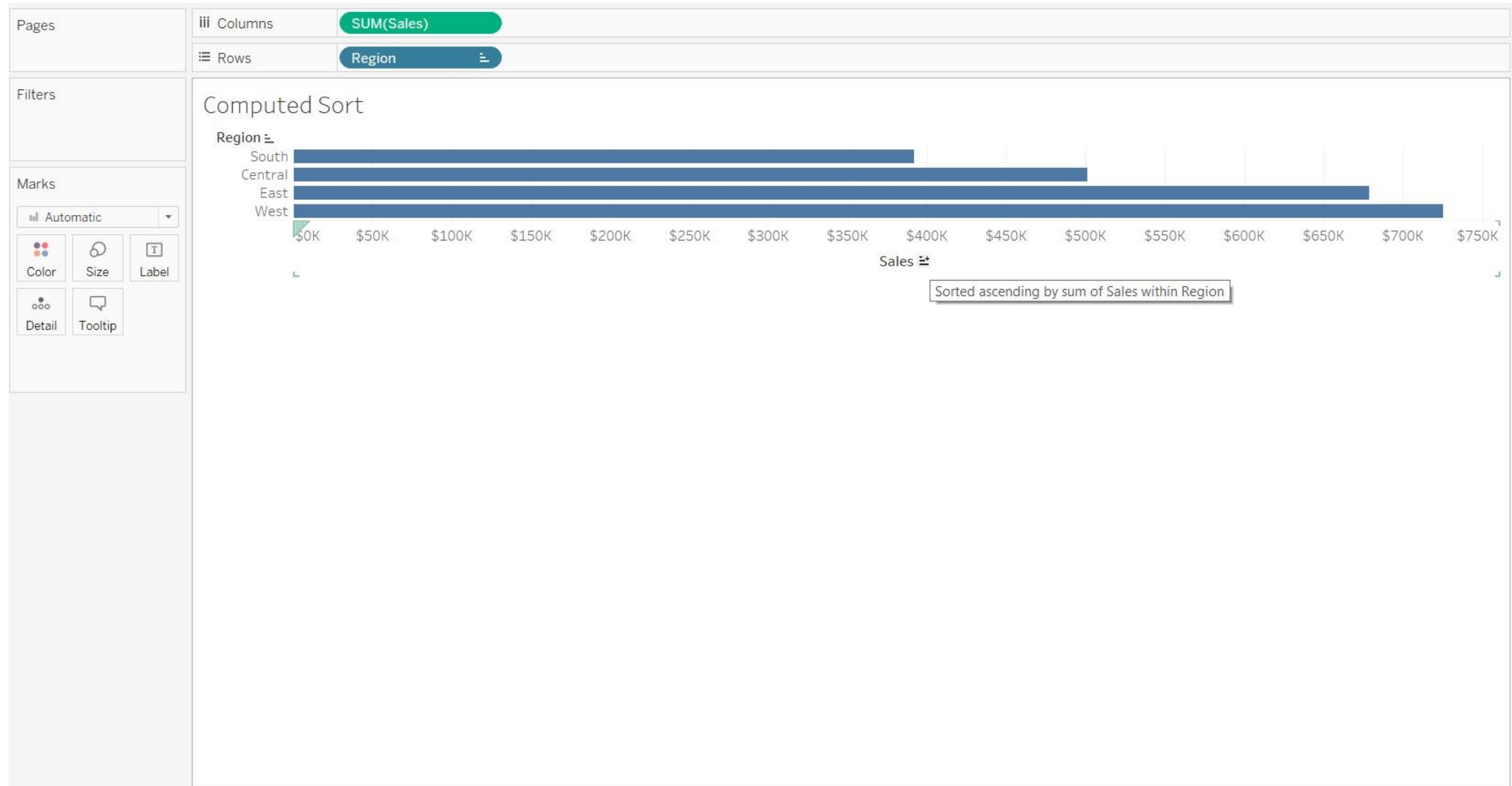
# METHOD I - COMPUTED SORT

**STEP 2:** One click will sort the Sales in descending order



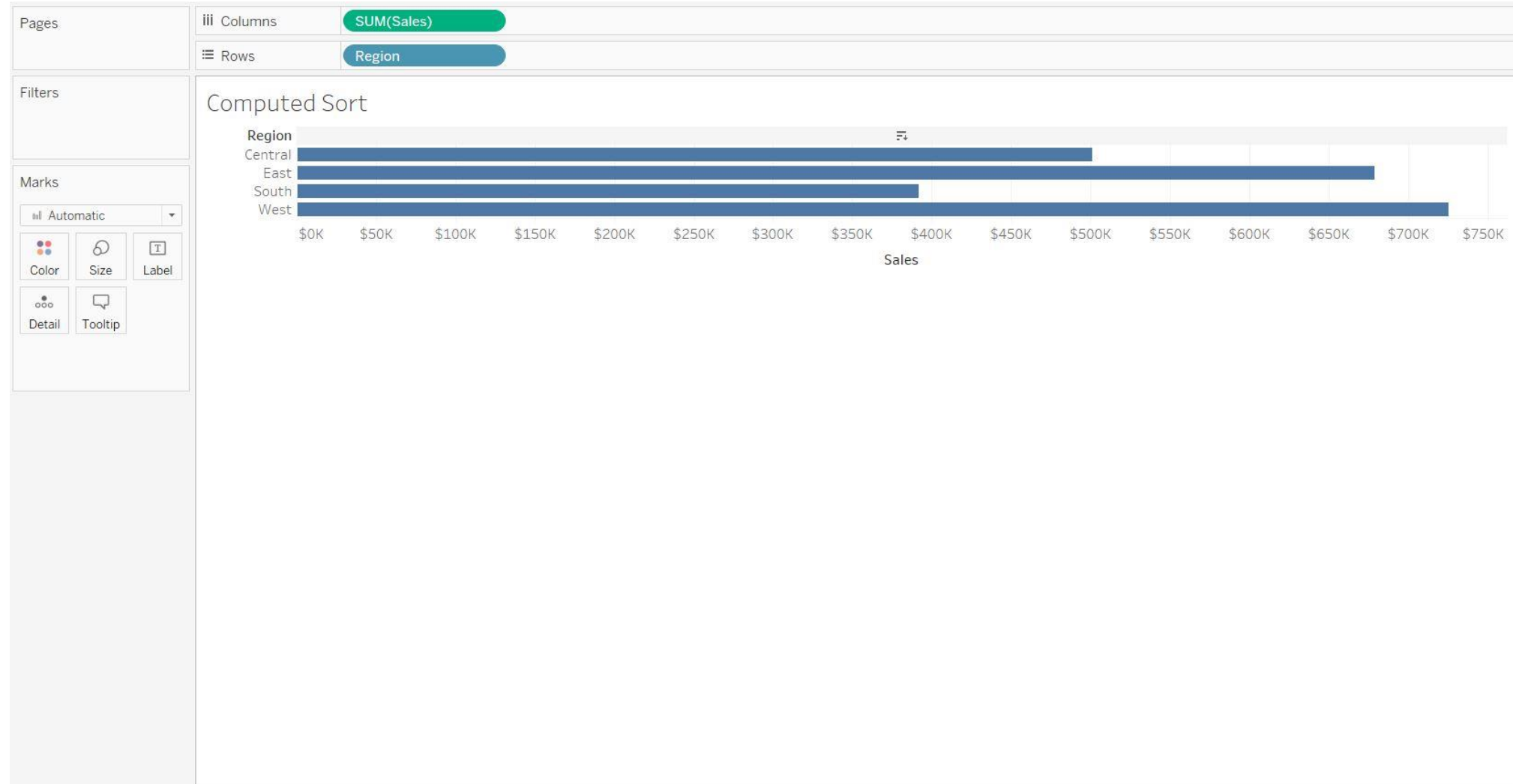
# METHOD I - COMPUTED SORT

**STEP 3:** Another click will sort the Sales in ascending order



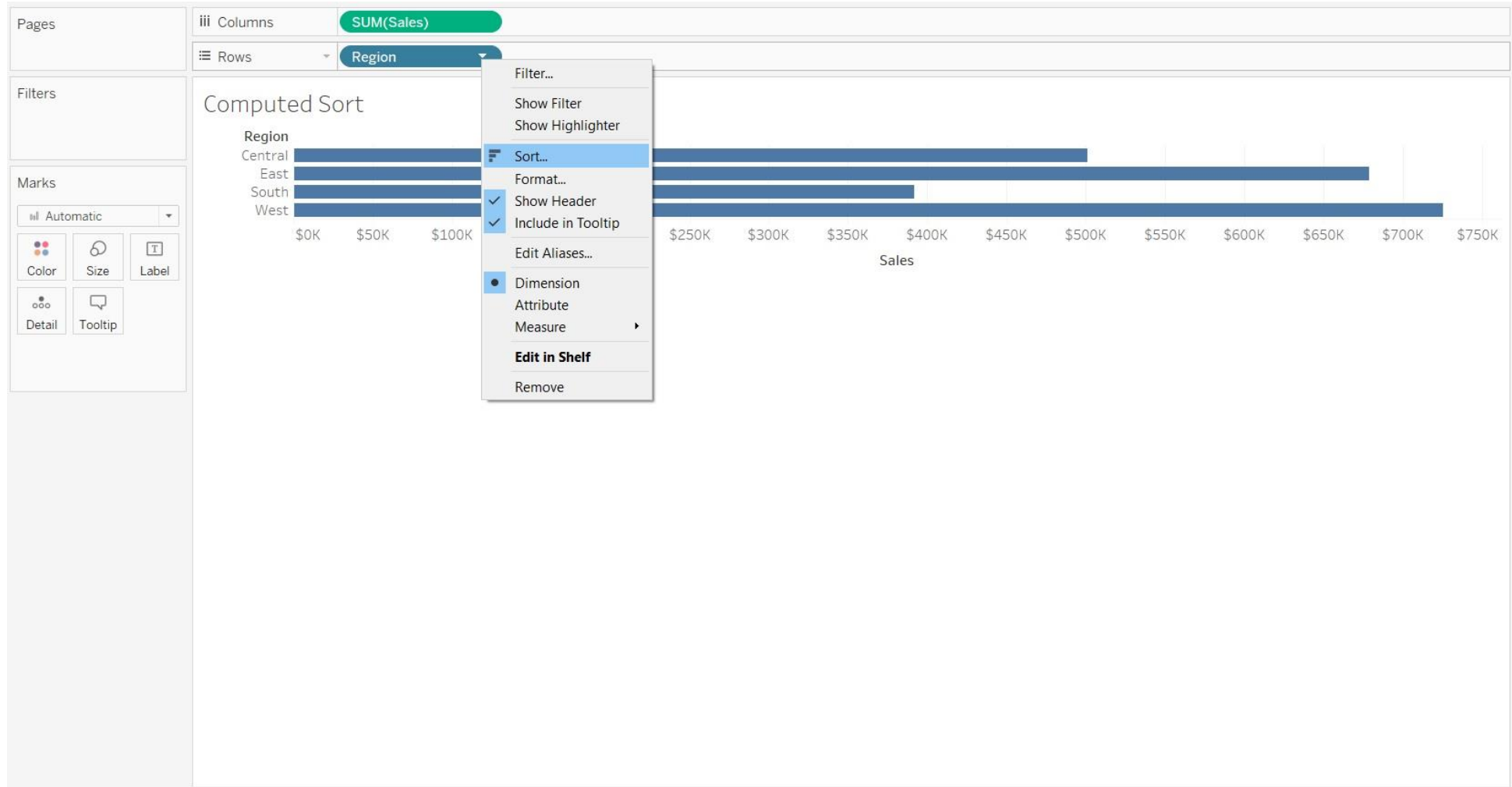
# METHOD I - COMPUTED SORT

## STEP 4: Another click will clear the sort



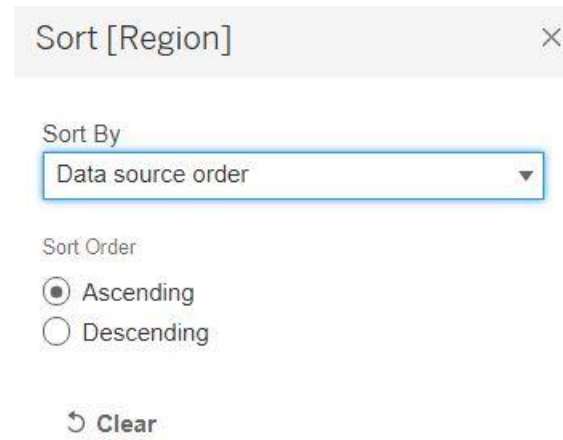
# METHOD I - COMPUTED SORT

**STEP 5:** Another method to sort is to right-click the dimension pill **Region** and select the **Sort**



# METHOD I - COMPUTED SORT

**STEP 6: Sort[Region]** dialog box is seen



Sort [Region] ×

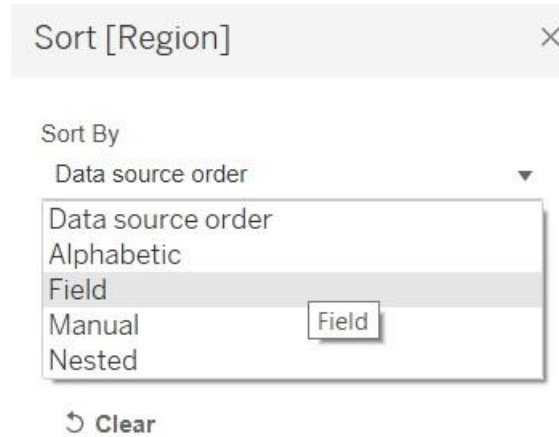
Sort By  
Data source order ▼

Sort Order  
☒ Ascending  
☐ Descending

↻ Clear

# METHOD I - COMPUTED SORT

**STEP 7:** Select the option in the **Sort By** drop-down e.g.: **Field**



The image shows a software interface for sorting data. At the top is a header bar labeled "Sort [Region]" with a close button (X) on the right. Below this is a "Sort By" section. It features a dropdown menu currently showing "Data source order". The dropdown is open, revealing a list of options: "Data source order", "Alphabetic", "Field", "Manual", and "Nested". The "Field" option is highlighted with a grey background. A small tooltip box with the text "Field" is positioned over the "Field" option. At the bottom of the "Sort By" section is a "Clear" button with a circular arrow icon.



# METHOD I - COMPUTED SORT

**STEP 8:** Select the required **Sort Order** e.g.: **Descending**

Sort [Region] ×

Sort By  
Field ▼

Sort Order  
☒ Ascending  
☐ Descending

Field Name  
Sales ▼

Aggregation  
Sum ▼

↺ Clear

Sort [Region] ×

Sort By  
Field ▼

Sort Order  
☐ Ascending  
☒ Descending

Field Name  
Sales ▼

Aggregation  
Sum ▼

↺ Clear

# METHOD I - COMPUTED SORT

**STEP 9:** Select the required Field Name e.g.: **Sales**

The image shows a 'Sort [Region]' dialog box with a close button (X) in the top right corner. It contains three sections: 'Sort By' with a dropdown menu set to 'Field'; 'Sort Order' with two radio buttons, 'Ascending' and 'Descending', where 'Descending' is selected; and 'Field Name' with a dropdown menu set to 'Sales'. The 'Field Name' dropdown is open, displaying a list of field names: 'Search', 'Discount', 'Order Date', 'Order ID', 'Orders', 'Postal Code', 'Product ID', 'Product Name', 'Profit', 'Quantity', 'Region', 'Row ID', and 'Sales'. The 'Sales' option at the bottom of the list is highlighted with a grey background.

# METHOD I - COMPUTED SORT

**STEP 10:** Select the required **Aggregation** e.g.: **Sum**

The image shows a 'Sort [Region]' dialog box with the following settings:

- Sort By:** Field
- Sort Order:** Descending (selected)
- Field Name:** Sales
- Aggregation:** Sum (selected from the dropdown menu)

The 'Aggregation' dropdown menu is open, showing the following options: Sum, Average, Median, Count, Count (Distinct), Minimum, Maximum, Percentile, Std. Dev, Std. Dev (Pop.), Variance, and Variance (Pop.). The 'Sum' option is highlighted, and a small 'Sum' label is visible next to it.

## METHOD I - COMPUTED SORT

**STEP 11:** If required we can sort by another measure that is not present in the view e.g.: **Profit**  
Close the dialog box

Sort [Region] ×

Sort By

Nested ▼

Sort Order

☐ Ascending

☒ Descending

Field Name

Profit ▼

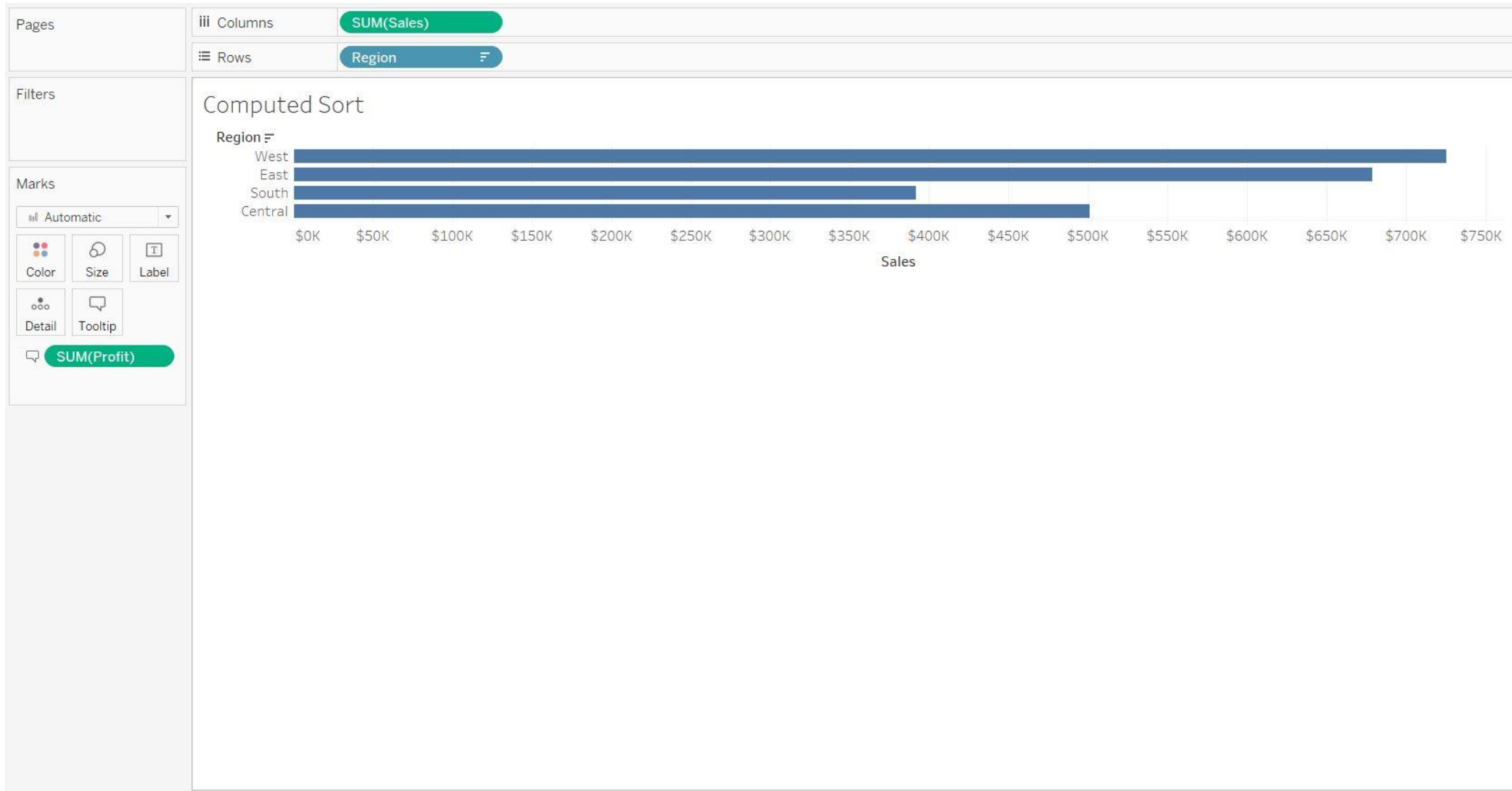
Aggregation

Sum ▼

↺ Clear

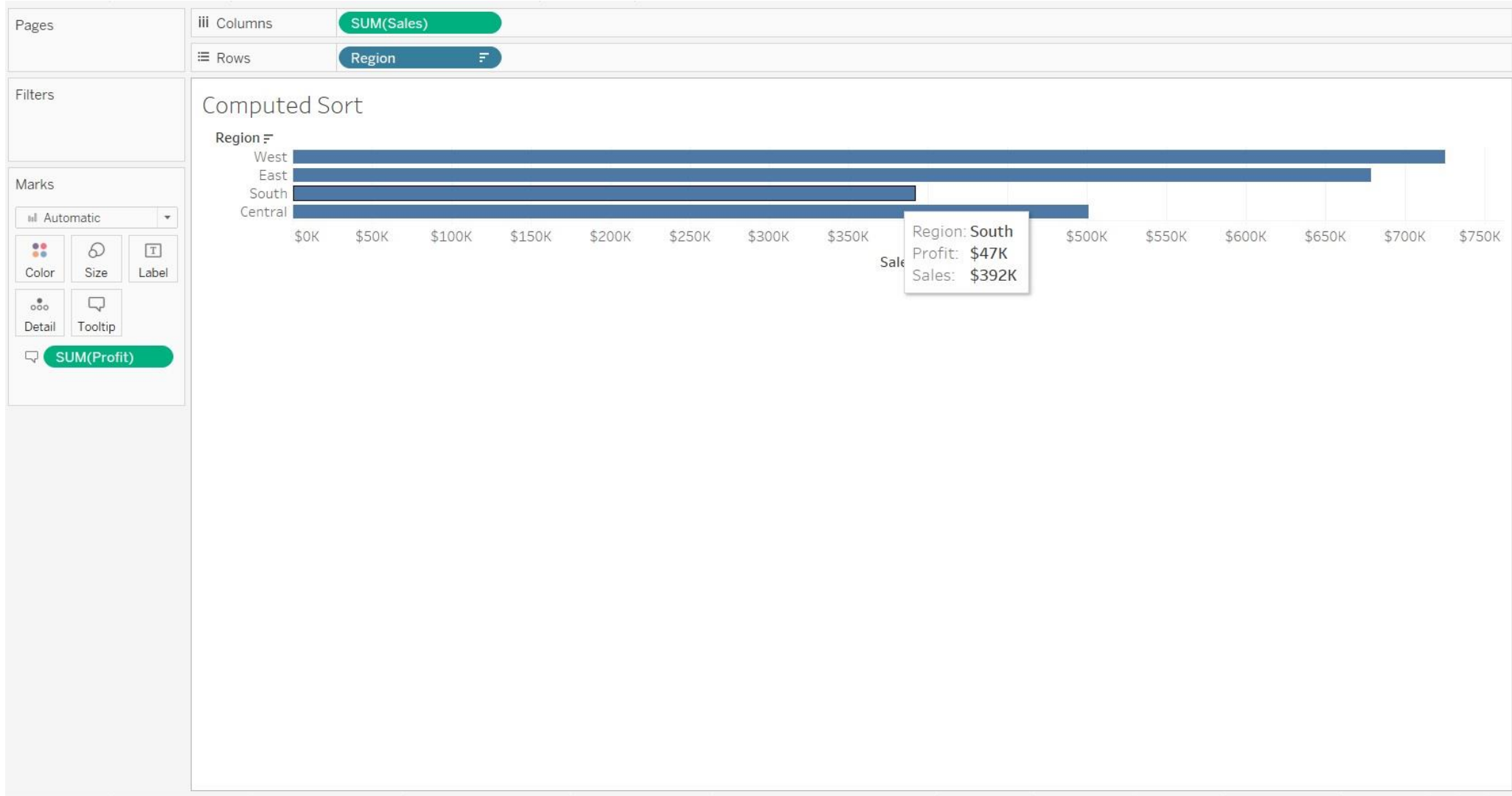
# METHOD I - COMPUTED SORT

## STEP 12: Drag the **Profits** to the **Tooltip** of **Marks** card



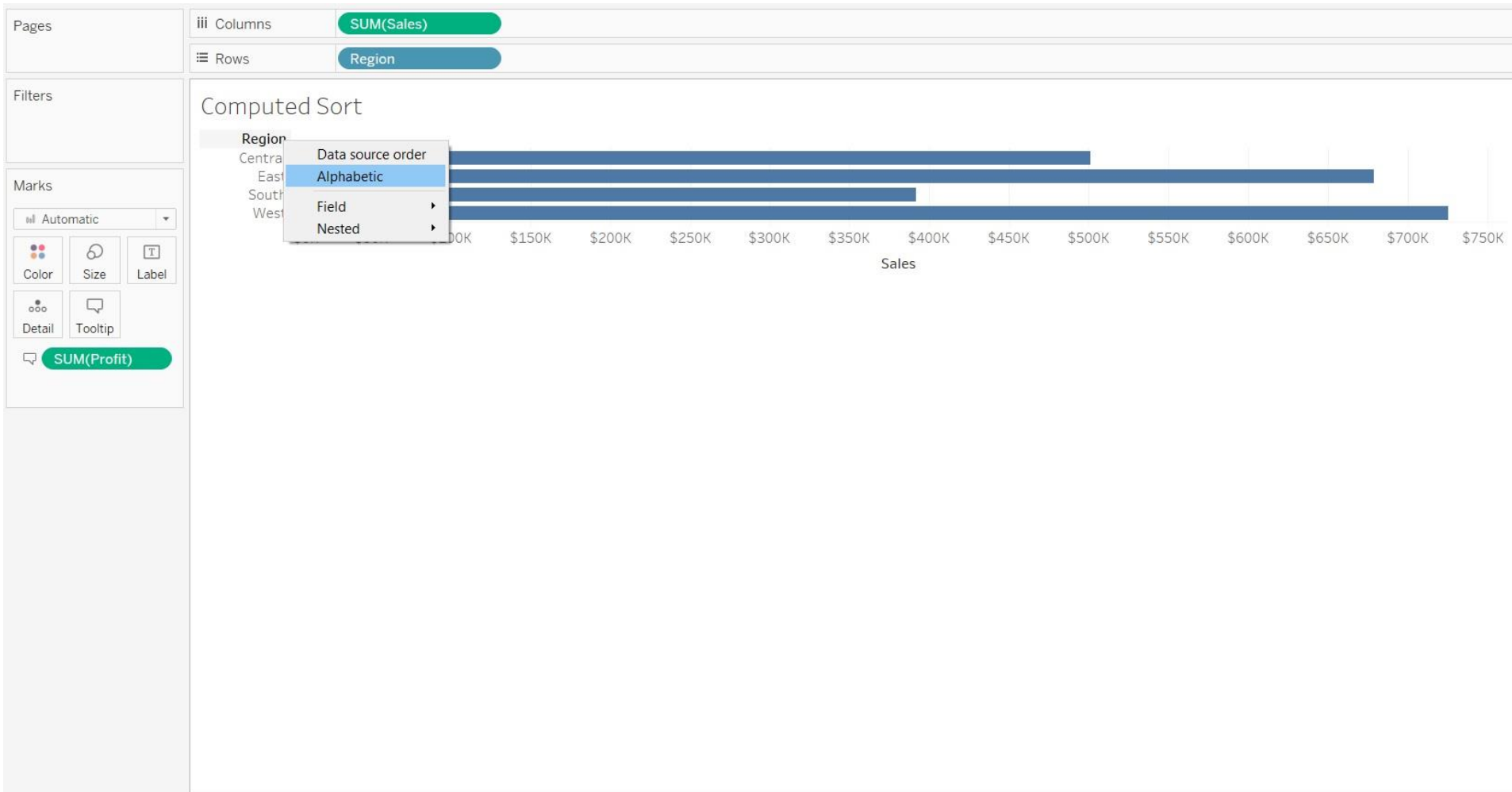
# METHOD I - COMPUTED SORT

**STEP 13:** This is the sorted by Profit view with South having greater Profit than Central Region



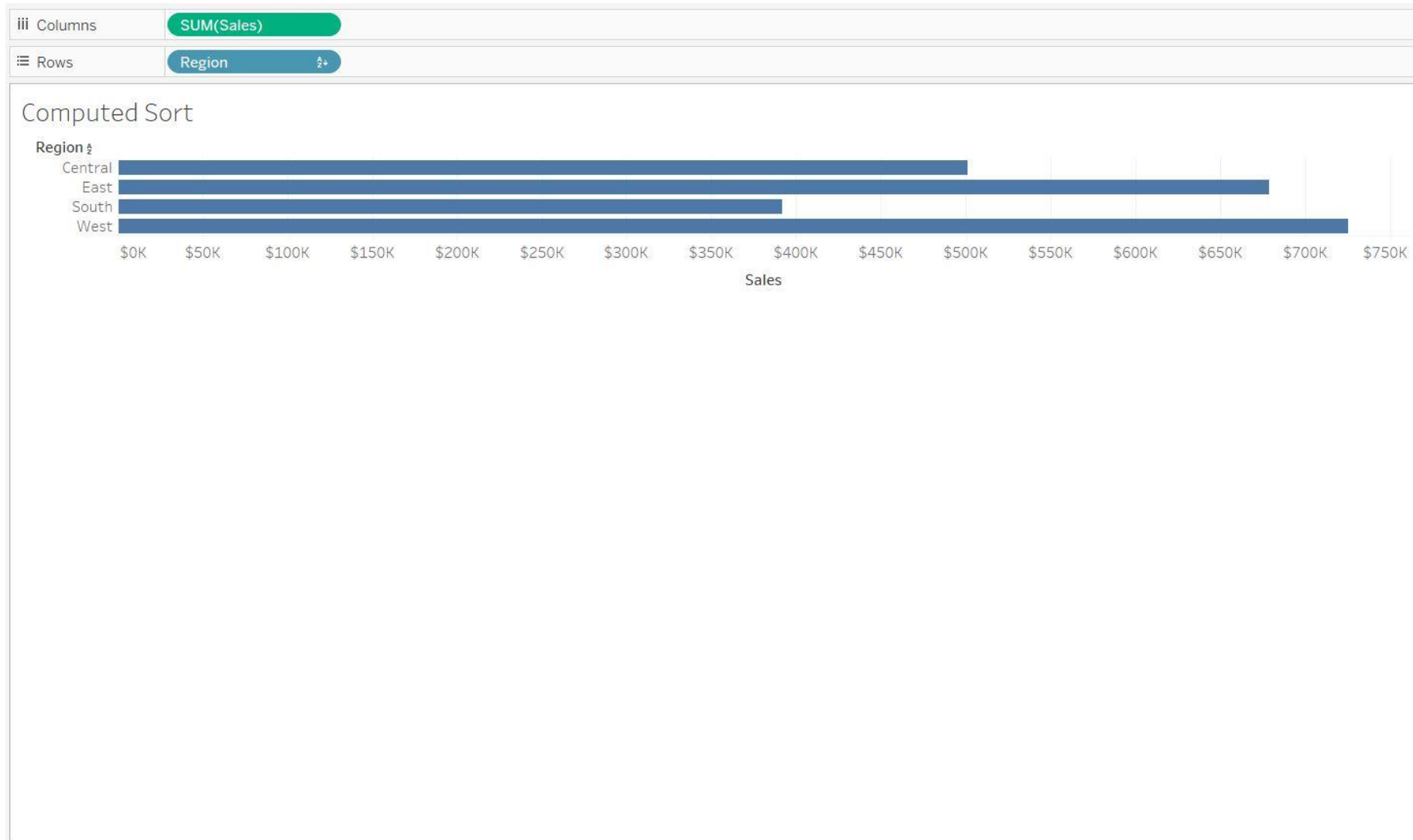
# METHOD I - COMPUTED SORT

**STEP 14:** If required we can sort the Labels by Alphabetical order  
Click on **Region** and select **Alphabetic**



# METHOD I - COMPUTED SORT

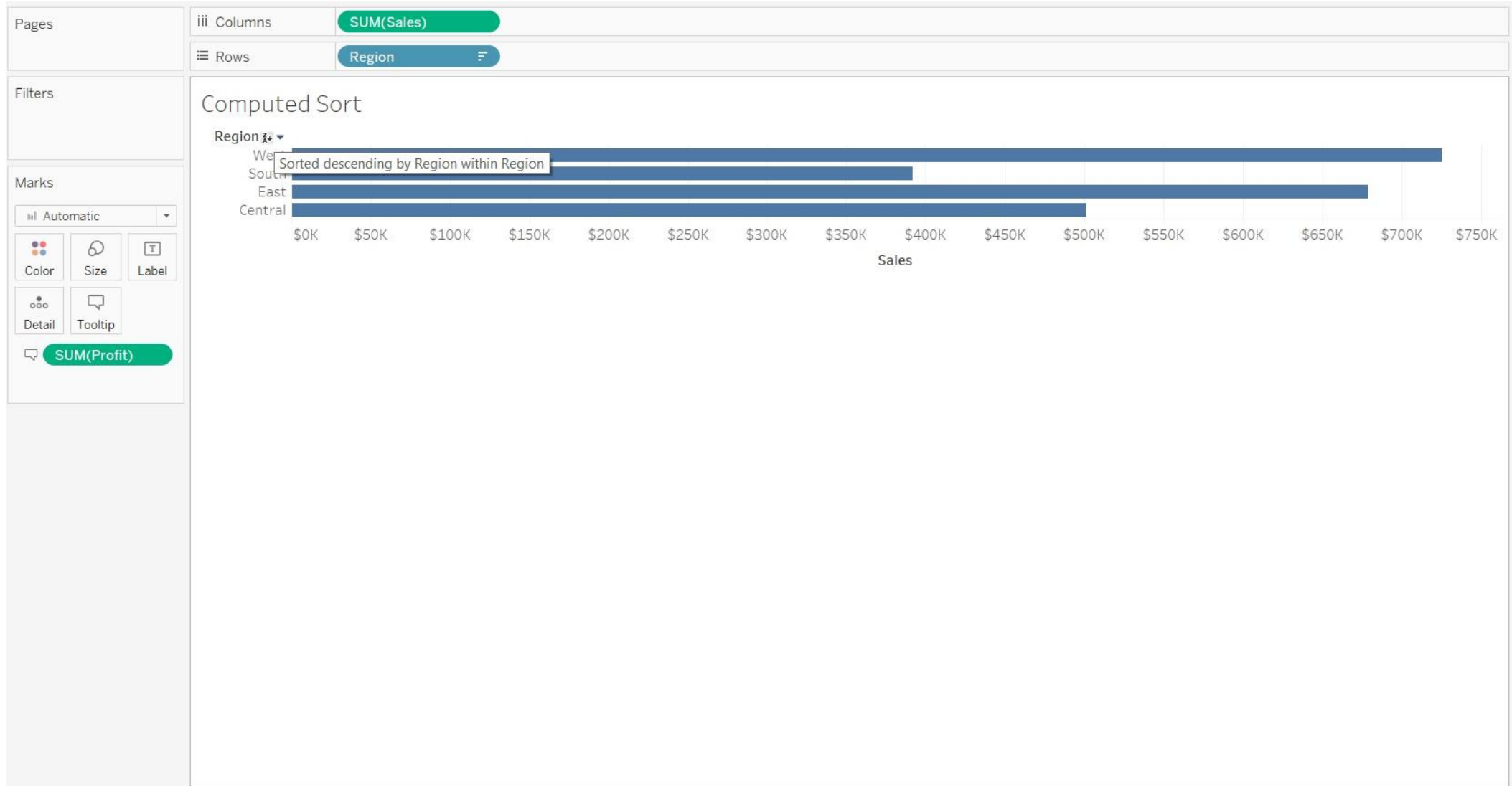
**STEP 15:** The AZ icon is now visible next to Region.  
The default sort will be from A to Z





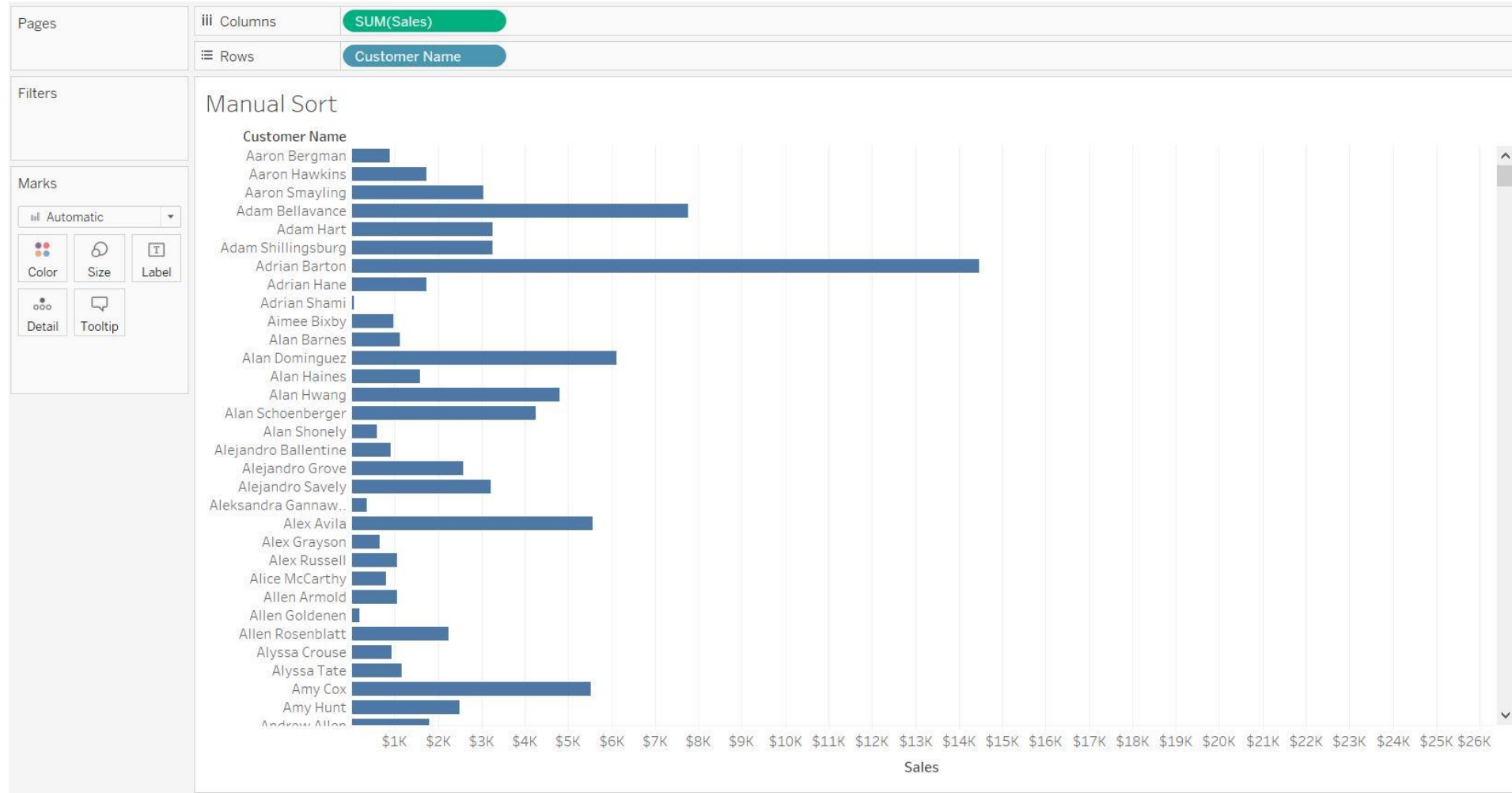
# METHOD I - COMPUTED SORT

**STEP 16:** Click on AZ icon and now the alphabetic sorting will be from Z to A



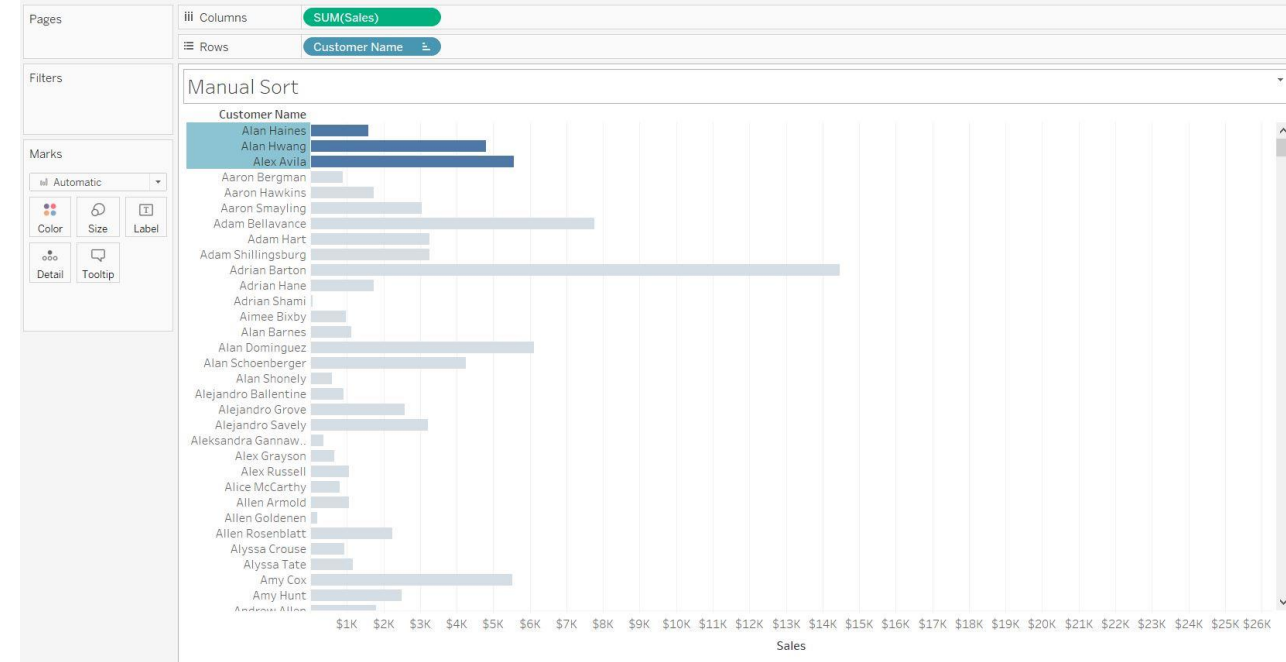
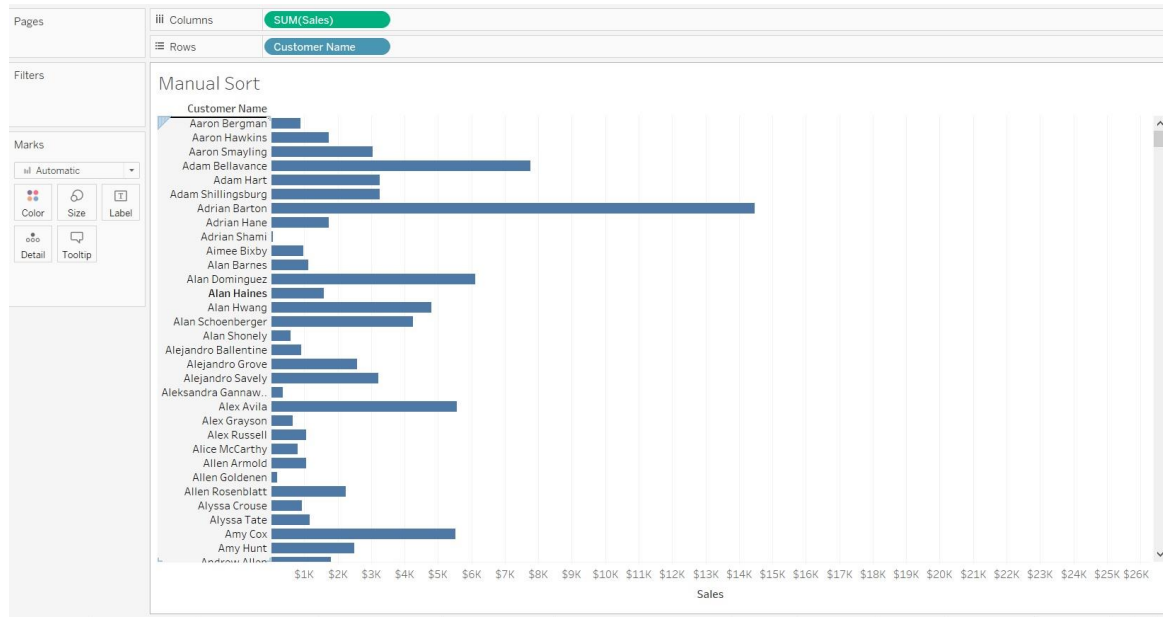
# METHOD II - MANUAL SORT

**STEP 1:** Assume that we have a Bar Chart view of Sales Vs Customer Name



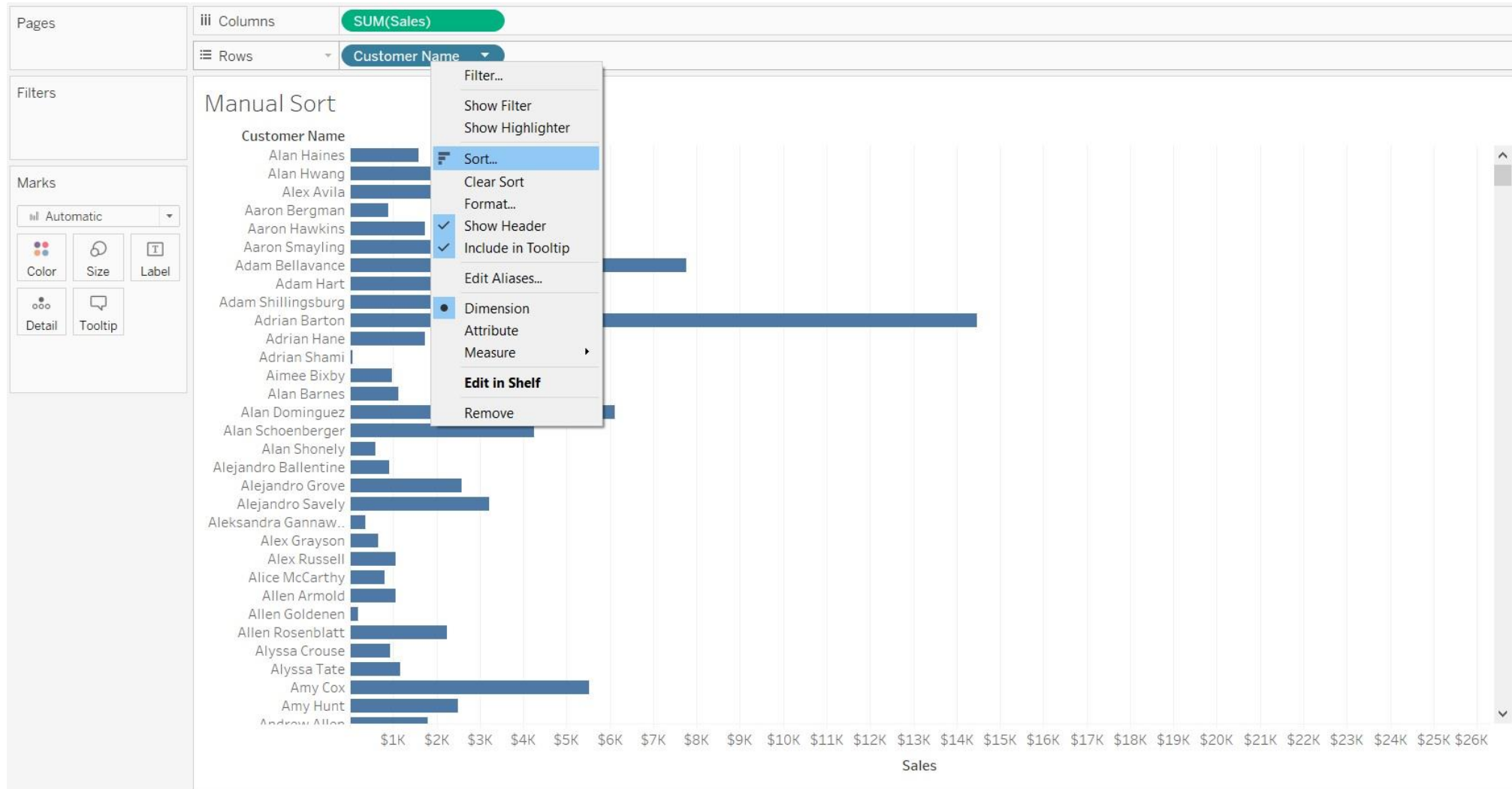
# METHOD II - MANUAL SORT

**STEP 2:** Consider we want to separately track the Sales performance of certain customers  
Drag and drop the required Customer Names to top of view



# METHOD II - MANUAL SORT

**STEP 3:** To confirm the Manual sort right-click the **Customer Name** pill and select **Sort**



## METHOD II - MANUAL SORT

**STEP 4: Sort[Customer Name]** dialog box will appear.  
Confirm that the **Sort By** is **Manual**

Sort [Customer Name] ×

Sort By

Manual ▼

Alan Haines

Alan Hwang

Alex Avila

Aaron Bergman

Aaron Hawkins

Aaron Smayling

Adam Bellavance

Adam Hart

Adam Shillingsburg

Adrian Barton

Adrian Hane

↺ Clear