

Birst Pronto: Relate Data to Other Data in Pronto

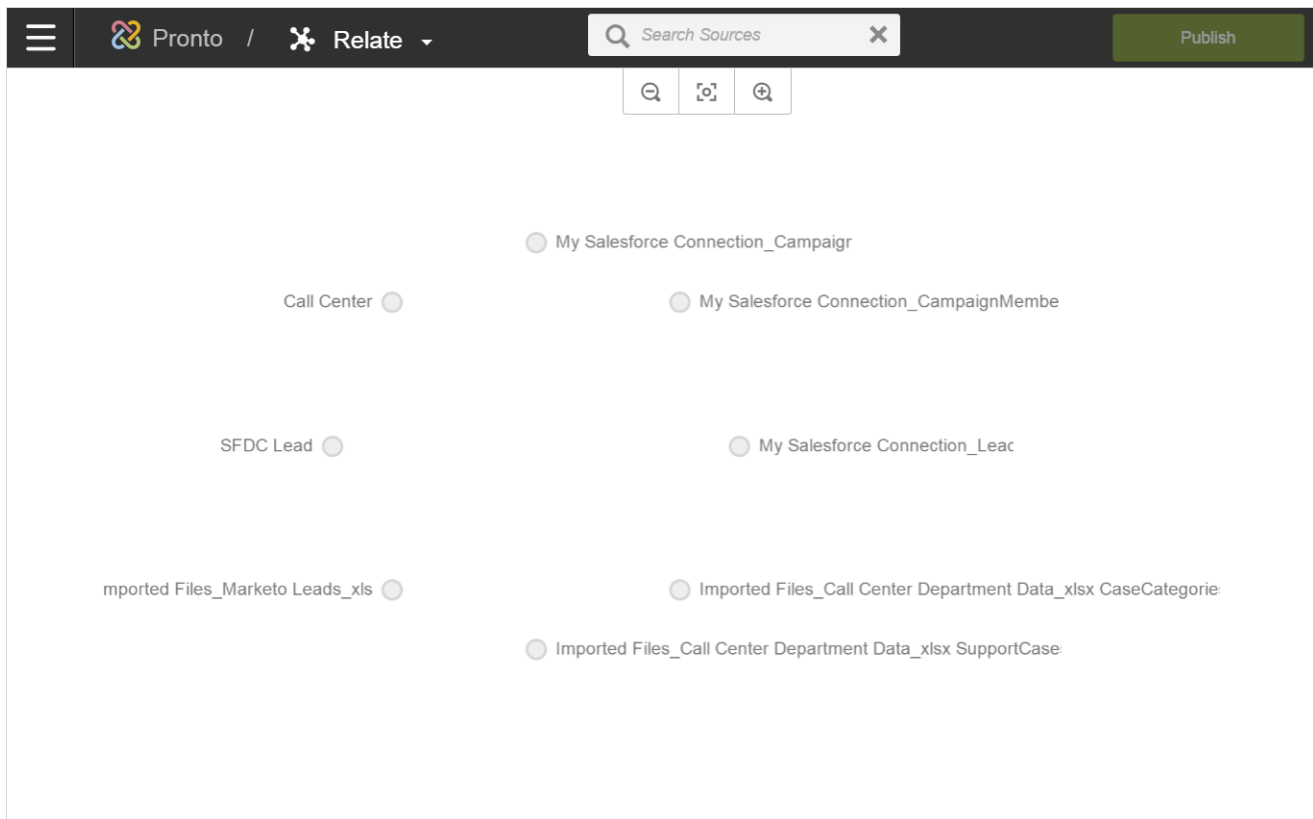
Posted by [Dee Elling](#) Jan 28, 2017

Welcome to this installment of Birst Pronto overviews. In this discussion, I'll show you the Pronto Relate page and how it lets you set up relationships between the various data sources you have imported and set up in Pronto. If you are familiar with database joins and know about attributes and measures, the Relate page handles all of those.

Use the Relate page when you know that the report you want to make needs to show data from multiple sources, and for one of many reasons it doesn't make sense to merge the tables together.

Using the Relate page is optional... if your data is already set up the way you need it for reports, you can go straight to Visualizer after you've uploaded the raw sources and extracted them in the Connect page, or after you've created prepared sources and published them in the Prepare page.

When you go to the Relate page for the first time, you see all of the data sources, both raw and prepared, arranged in a circle.



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Tip: If Pronto detects that there are changes that haven't yet been published (saved), you get a message prompting you to Publish before using the Relate page.

What relationships do you want to create between the different sources, and what columns can help to define the relationship?

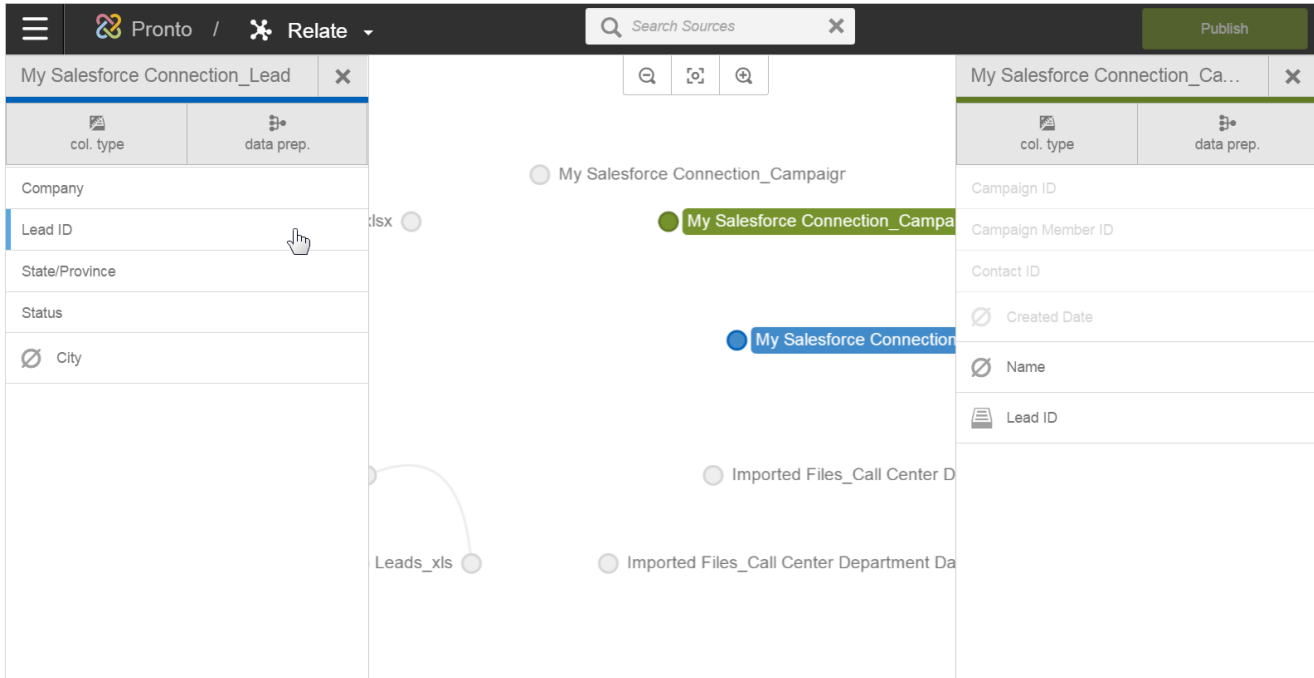
For example, if you want a report that shows what leads came from what marketing campaigns, you create a relationship between the CampaignMember and Lead tables. The column that they have in common is the Lead ID column.

In this example, you select the Connection_Lead table, and the CampaignMember table. Pronto shows the columns from each on the sidebars.

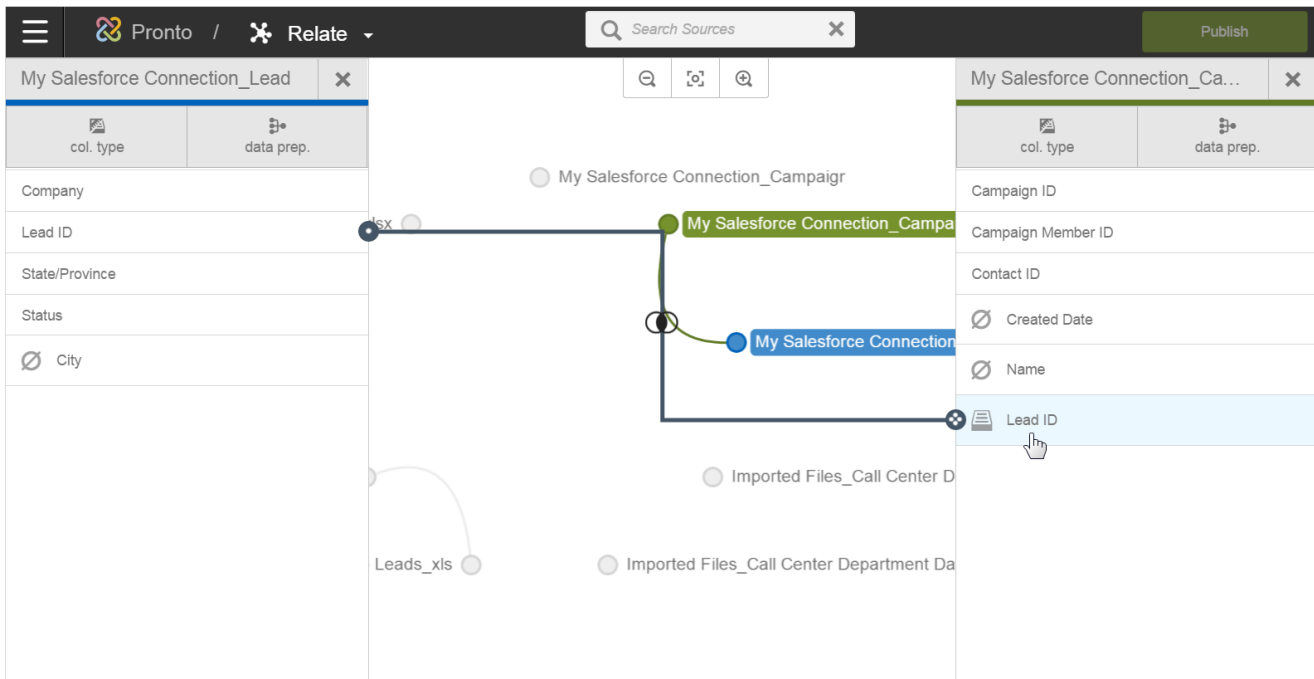
The screenshot shows the 'Relate' interface in Birst Pronto. The central workspace displays a relationship diagram with nodes for 'My Salesforce Connection_Lead', 'My Salesforce Connection_CampaignMember', 'Leads_xls', and 'Imported Files_Call Center Department Data'. A relationship line connects 'My Salesforce Connection_Lead' and 'My Salesforce Connection_CampaignMember'. The left sidebar shows the columns for 'My Salesforce Connection_Lead': Company, Lead ID, State/Province, Status, and City. The right sidebar shows the columns for 'My Salesforce Connection_CampaignMember': Campaign ID, Campaign Member ID, Contact ID, Created Date, Name, and Lead ID. The 'Lead ID' column in the right sidebar is highlighted, indicating it is the selected join column.

Then you tell Pronto what to use for the join. Select a column from the left; it should be a column that has unique values in every cell, such as an ID column. Pronto grays out the columns on the right that are not going to match, and leaves the ones that may match, based on an automatic analysis of the data.

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In this case the Lead ID in the CampaignMember table is the best match. When you click it, Pronto creates the relationship (join) and shows it to you.



Using the Recommendation Method

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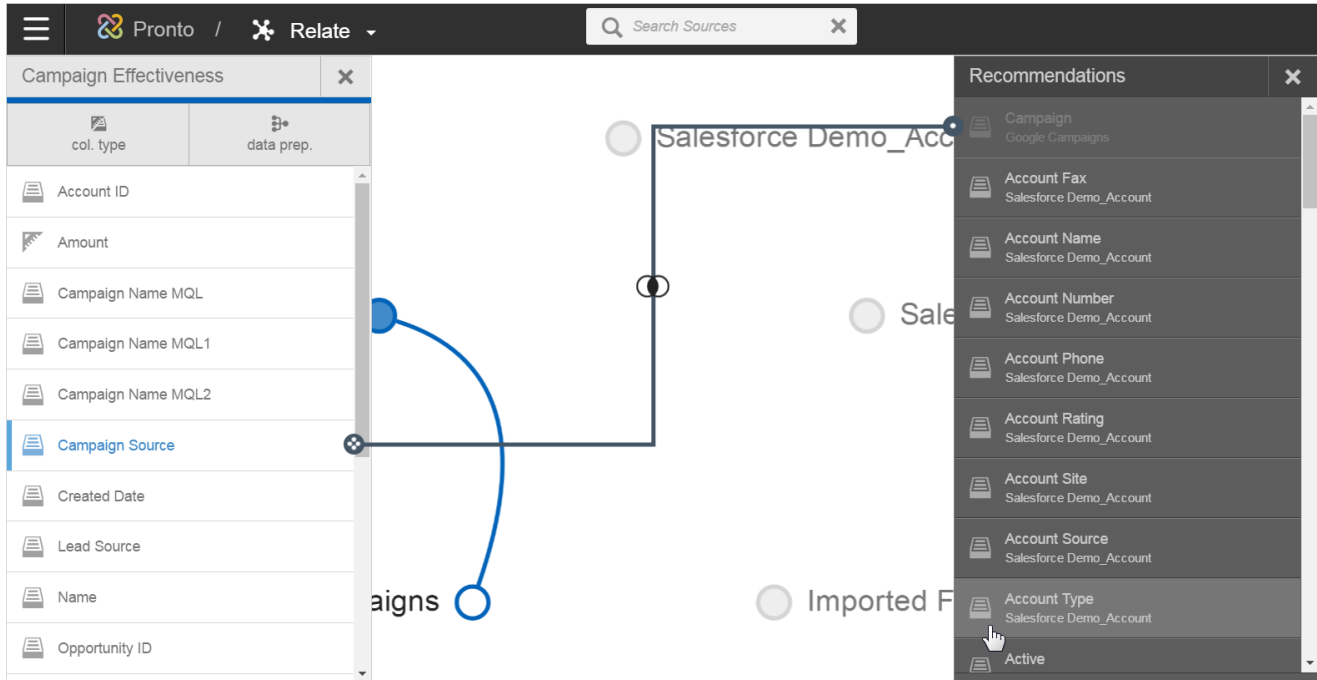
If you already know what columns relate to each other from different tables, you can pick them out yourself. Pronto will also make suggestions of possible column relationships.

When you click on a column on the left, Pronto gives suggestions for possible joins on the right. These suggestions are based on data types and not on the actual data in the columns, however if you select one that really doesn't match, Pronto warns you and you can delete it.

The screenshot shows the 'Relate' interface in Birst Pronto. On the left, a table named 'Campaign Effectiveness' is open, displaying a list of columns: Account ID, Amount, Campaign Name MQL (highlighted with a mouse cursor), Campaign Name MQL1, Campaign Name MQL2, Campaign Source, Created Date, Lead Source, Name, and Opportunity ID. The 'col. type' and 'data prep.' tabs are visible at the top of the table. In the center, a diagram shows a blue circle labeled 'Campaign Effectiveness' connected to a grey circle labeled 'Imported Files_Marketing'. On the right, a 'Recommendations' panel lists various columns from the 'Salesforce Demo_Account' table, including Account Fax, Account Name, Account Number, Account Phone, Account Rating, Account Site, Account Source, Account Type, Active, and Billing Address. A search bar at the top right of the interface is labeled 'Search Sources'.

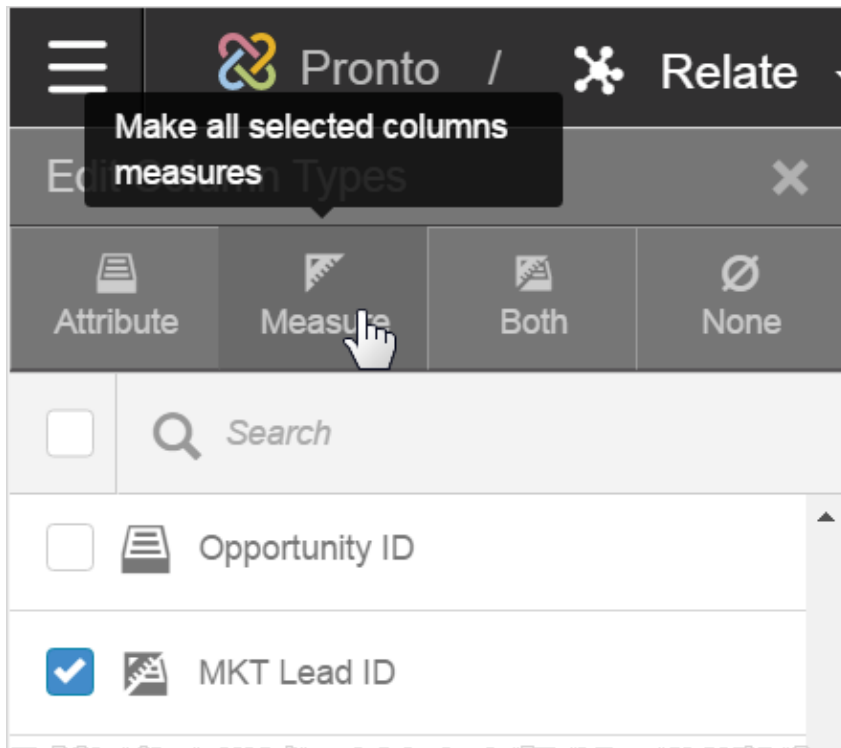
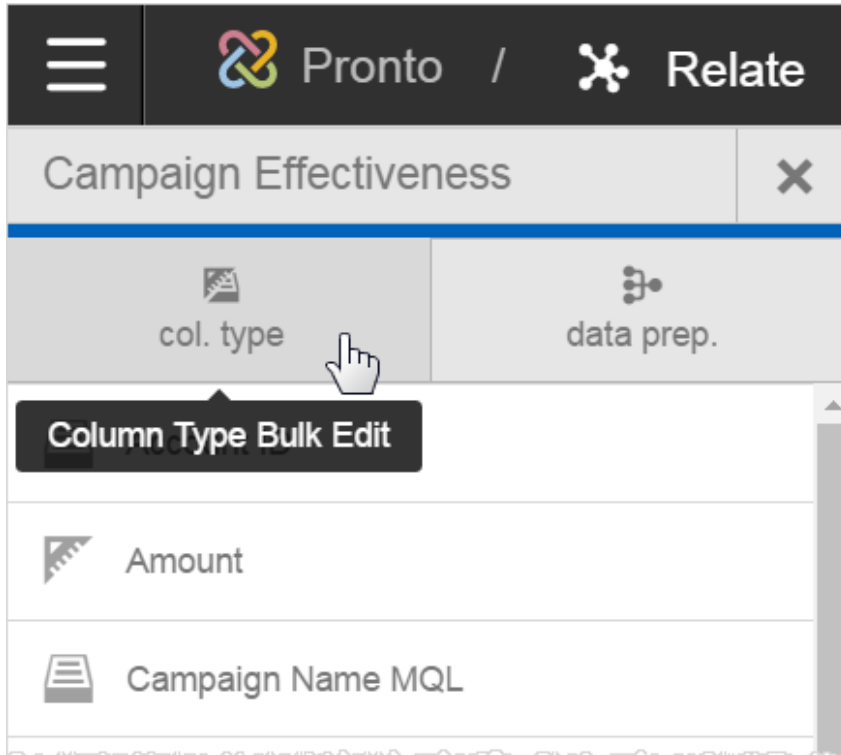
To make a join, drag the join line from a column on the left to the corresponding one on the right.

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Changing Column Types

For advanced users, note that you can change a column from an attribute to a measure or vice versa, or make one of each.



When you are done in Relate, click the Main menu to go to Visualizer and create reports.

