

Explore Data

Instantly drill into your dashboards to uncover the data behind every metric — filter, visualize, and export insights with ease.

Overview

The Explore Data feature in PersivX allows users to drill down into dashboard datasets, visualize records, and export insights instantly. It bridges the gap between dashboards and raw data by providing both tabular and visual exploration modes.

Open Explore Mode

From any dashboard widget, click “Explore Data” to open the detailed data view. This launches a modal that displays all underlying records filtered by the dashboard context.

PERSIVX v1.3.7

Harsh Jain (302.20 MB)

PERSIVX

Instance Management

Home

All Reports

Contact Group

Edit or create a new report

IMPORT REPORTCREATE A NEW REPORT

Report Name	Primary data source	Last Updated By	Last Updated On	
Search	Search	Search	Search	Search
DEMO - Marketing Expense Report	unpivoted_marketing_expense WORKSPACE	Sanket	2025-10-28 11:48:05 Hrs	⌵⌵⌵
Demo2	Sales_demo_2 WORKSPACE	Harsh Jain	2025-10-28 11:25:45 Hrs	⌵⌵⌵

PERSIVX Gulab PO

Harsh Jain

Order Status

Quality

Semi Quality

Aging (Qty Pending)

0 - 20

18.37k

20 - 30

1.93k

Purchase Orders

PARTY	Qty Ordered	Qty Delivered	Qty Pending	Broker
Search	Search	Search	Search	Search
AALIDHARA	4.98k	1.02k	3.96k	PRADEEP JAIN
AP CREATION (ASHWIN)	600.00	476.00	124.00	AASHISH GADIYA
BABOSA	3.36k	0.00	3.36k	PRADEEP JAIN

Explore Data

Print

Export

Create Subscription

Focus Mode

Data for Visualization

This view shows the underlying dataset for the AP Amount Considered report, displaying key fields like Company, MSME Type, Category, Vendor No., and Original Amount.

Features:

- Multi-cell selection: Select multiple rows or cells to focus on specific data segments.
- Instant summary: View Sum, Average, Min, Max, and Median for selected values in the footer.
- Data insights: See Distinct Values, Null Values, and Uniqueness % for quick data checks.

Explore Data (AP Amount Considered) ✕

ⓘ Filters, if any, applied on the dashboard are applied on the below data as well

Data for visualization Visualize

Download Excel

Download CSV

	A	B	C	D	E	F	G	H	I
	Company	MSME Type	Category	MSME No.	Gen. Bus. Posting Group	Vendor No	Vendor Name	Responsible Person	Original Amount
1	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-11.
2	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-58.
3	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-59.
4	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-59.
5	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-87.4
6	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-58.
7	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-11.
8	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-295.
9	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-295.
10	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-58.
11	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-11.
12	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-11.
13	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-11.
14	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-58.
15	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-8.
16	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-9.
17	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-11.
18	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-50.

Rows2661 Columns 29

Selected: 22.00

Distinct Values: 2.00

Null Values: 0.00 (0.00%)

Uniqueness %: 9.09%

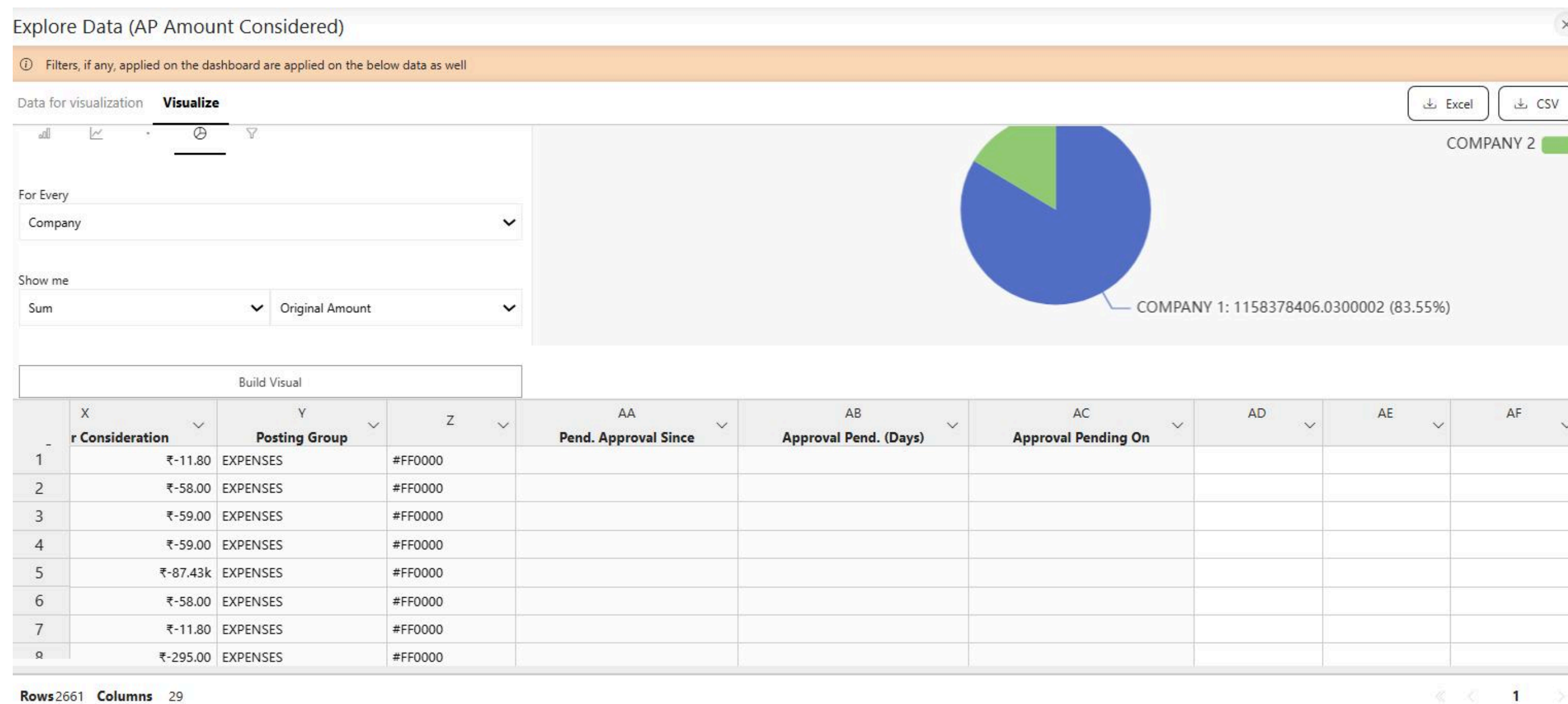


Switch to Visualize Mode

Click the “Visualize” tab to see summarized or aggregated results.

You can choose:

- For Every: Field to group by (e.g., Company, Category).
- Show Me: Metrics to display (e.g., Average, Sum, Count).

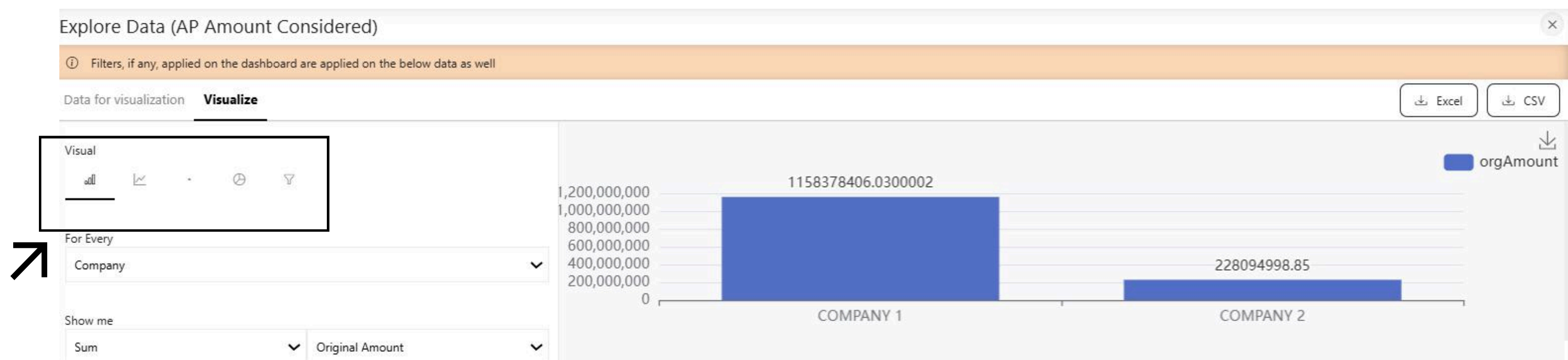


Switch to Visualize Mode

The Visualize tab in Explore Data allows you to transform raw tables into interactive visual charts.

You can quickly switch between multiple visualization types to better understand your data:

- 📊 Bar Chart – Compare numeric values (e.g., Sum of Amount by Company).
- 📈 Line Chart – View data trends or performance over time.
- 🥧 Pie Chart – See category-wise proportions at a glance.



Filter and Sort Options

Each column in the data grid includes built-in filter and sorting controls for quick analysis.

Features:

- Filter data: Apply filters using conditions like Equals, Contains, Starts With, etc., to narrow down the dataset.
- Sort values: Instantly sort records in ascending or descending order.
- Column-level control: Every field (e.g., Company, Vendor, or Posting Group) can be filtered independently.

Explore Data (AP Amount Considered)

Filters, if any, applied on the dashboard are applied on the below data as well

Data for visualization Visualize

Excel CSV

	A	B	C	D	E	F	G	H	I
	Company	MSME Type	Category	MSME No.	Gen. Bus. Posting Group	Vendor No	Vendor Name	Responsible Person	Original Amount
1	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-11.
2	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-58.
3	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-59.
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5	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-87.4
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8	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-295.
9	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-295.
10	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-58.
11	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-11.
12	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-11.
13	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-11.
14	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-58.
15	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-8.
16	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-9.
17	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-11.
18	COMPANY 1		NON MSME		DOMESTIC	V00005	Name V00005	RP0	₹-11.

Rows 2661 Columns 29

Selected: 2,663.00 Distinct Values: 2.00 # Null Values: 4.00 (0.15%) Uniqueness %: 0.08%



Apply Functions in Data View

The Explore Data grid supports direct formula input, enabling users to perform quick calculations without exporting to Excel.

Features:

- Formula bar: Type “=” to access a list of 400+ supported functions — including math, logic, text, and lookup formulas.
- Dynamic results: Calculations update instantly as data changes or filters are applied.
- Excel-like experience: Functions such as SUM, AVERAGE, FILTER, VLOOKUP, and more work directly within the PersivX interface.

Explore Data (AP Amount Considered)

① Filters, if any, applied on the dashboard are applied on the below data as well

Data for visualization Visualize

	X	Y	Z	AA	AB	AC	AD	AE	AF
	r Consideration	Posting Group		Pend. Approval Since	Approval Pend. (Days)	Approval Pending On			
1	₹-11.80	EXPENSES	#FF0000						
2	₹-58.00	EXPENSES	#FF0000						
3	₹-59.00	EXPENSES	#FF0000						
4	₹-59.00	EXPENSES	#FF0000						
5	₹-87.43k	EXPENSES	#FF0000						
6	₹-58.00	EXPENSES	#FF0000						
7	₹-11.80	EXPENSES	#FF0000						
8	₹-295.00	EXPENSES	#FF0000						
9	₹-295.00	EXPENSES	#FF0000						
10	₹-58.00	EXPENSES	#FF0000						
11	₹-11.80	EXPENSES	#FF0000						
12	₹-11.80	EXPENSES	#FF0000						
13	₹-11.80	EXPENSES	#FF0000						
14	₹-58.00	EXPENSES	#FF0000						
15	₹-8.02	EXPENSES	#FF0000						
16	₹-9.91	EXPENSES	#FF0000						
17	₹-11.80	EXPENSES	#FF0000						
18	₹-58.00	EXPENSES	#FF0000						

Rows 2661 Columns 29



Export Data

After exploring, export your results in preferred formats:

- Excel (.xlsx)
- CSV (.csv)

These downloads include the applied filters and visible columns for accuracy.

Explore Data (Sales Summary (all values in Cr))

Filters, if any, applied on the dashboard are applied on the below data as well

Data for visualization

Visualize

	A	B	C	D	E	F	G
	company	Sales Amount	group	Sales Category			
1	SOLEX	0.00	MTD (up to 28-10-2025)	EPC			
2	SOLEX	2.18	MTD (up to 28-10-2025)	MODULE			
3	SOLEX	1.03	MTD (up to 28-10-2025)	OTHER			
4	GREEN	0.02	MTD (up to 28-10-2025)	EPC			
5	SOLEX	6.96	YTD (up to 28-10-2025)	EPC			
6	SOLEX	7.29	YTD (up to 28-10-2025)	OTHER			
7	SOLEX	361.92	YTD (up to 28-10-2025)	MODULE			
8	GREEN	35.75	YTD (up to 28-10-2025)	EPC			
9	SOLEX	0.00	QTD (up to 28-10-2025)	EPC			
10	SOLEX	2.18	QTD (up to 28-10-2025)	MODULE			
11	SOLEX	1.03	QTD (up to 28-10-2025)	OTHER			
12	GREEN	0.02	QTD (up to 28-10-2025)	EPC			
13							
14							
15							

↓ Excel

↓ CSV

Rows 12 Columns 4