

Alibaba Cloud Quick BI

Best Practices

Issue: 20190401

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Generic conventions

Table -1: Style conventions

Style	Description	Example
	This warning information indicates a situation that will cause major system changes, faults, physical injuries, and other adverse results.	 Danger: Resetting will result in the loss of user configuration data.
	This warning information indicates a situation that may cause major system changes, faults, physical injuries, and other adverse results.	 Warning: Restarting will cause business interruption. About 10 minutes are required to restore business.
	This indicates warning information, supplementary instructions, and other content that the user must understand.	 Notice: Take the necessary precautions to save exported data containing sensitive information.
	This indicates supplemental instructions, best practices, tips, and other content that is good to know for the user.	 Note: You can use Ctrl + A to select all files.
>	Multi-level menu cascade.	Settings > Network > Set network type
Bold	It is used for buttons, menus, page names, and other UI elements.	Click OK.
Courier font	It is used for commands.	Run the <code>cd / d C :/ windows</code> command to enter the Windows system folder.
<i>Italics</i>	It is used for parameters and variables.	<code>bae log list --instanceid Instance_ID</code>
[] or [a b]	It indicates that it is an optional value, and only one item can be selected.	<code>ipconfig [-all -t]</code>

Style	Description	Example
<code>{}</code> or <code>{a b}</code>	It indicates that it is a required value, and only one item can be selected.	<code>swich {stand slave}</code>

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1 Common practices

1.1 Create a dashboard with a cross-chart reference

When you create a dashboard, you may have a requirement like that. For example, when you click an area of a chart, you want the corresponding fields of other correlated charts to change along with this area.

This section describes how to create a dashboard with a cross-chart reference. Take a sample dataset provided in our data model as an example. This dashboard consists of two charts, divided into two parts the upper half and lower half respectively. In the upper half, a pie chart contains the profit data for each region. In the lower half, a table contains the sales and profit data of cities in each region.

Prepare sample datasets

Create a dataset by using a CSV file. For more information, see [Upload local files](#).

Rename this dataset demo sales dataset.

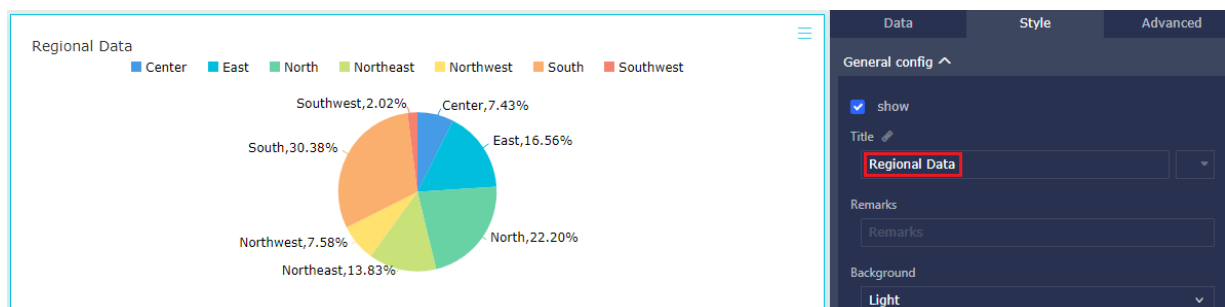
Create a pie chart that contains profit data of each region

Create a dashboard and then click the pie chart icon in the configuration area of this dashboard. You can configure the dataset of this pie chart as follows.

- Select Sales data demo dataset as the dataset of this pie chart.
- Select the area field as a dataset dimension.
- Select the profit_amt field as a metric.

Click the Update button.

On the Style tab, set the title of the pie chart to Regional Data. The result is shown in the following figure.



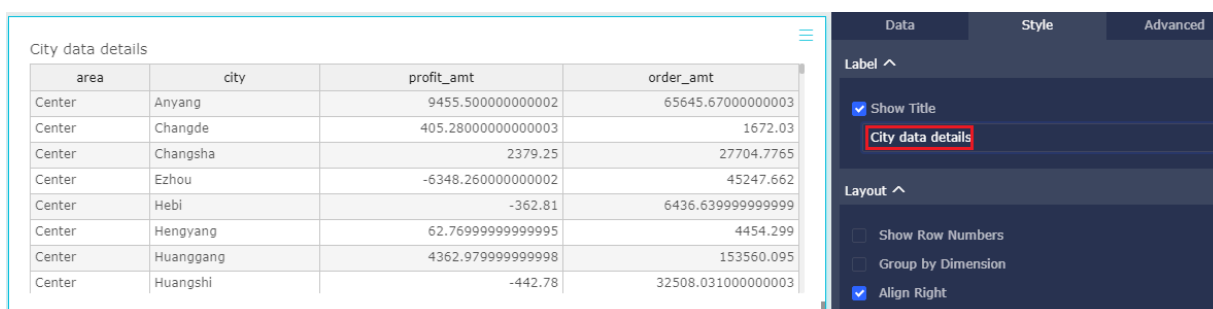
Create a table that contains sales and profit details of cities in each region

In the configuration area of this dashboard, click the table icon and then drag it to the lower half of the dashboard. You can configure data attributes of this table as follows.

- Select Sales data demo dataset as a dataset of this table.
- Select the area field and the city field as data dimensions.
- Select the profit_amt field and the order_amt field as metrics.

On the Style tab of the table, set the title of this table to City data details.

Click the Update button. The result is shown as follows.



The screenshot shows a table titled "City data details" with the following data:

area	city	profit_amt	order_amt
Center	Anyang	9455.500000000002	65645.670000000003
Center	Changde	405.28000000000003	1672.03
Center	Changsha	2379.25	27704.7765
Center	Ezhou	-6348.260000000002	45247.662
Center	Hebi	-362.81	6436.639999999999
Center	Hengyang	62.76999999999995	4454.299
Center	Huanggang	4362.979999999998	153560.095
Center	Huangshi	-442.78	32508.031000000003

To the right of the table is a configuration panel with three tabs: Data, Style, and Advanced. The Style tab is selected. Under the "Label" section, the "Show Title" checkbox is checked, and the title "City data details" is entered in the text field. Under the "Layout" section, the "Align Right" checkbox is checked.

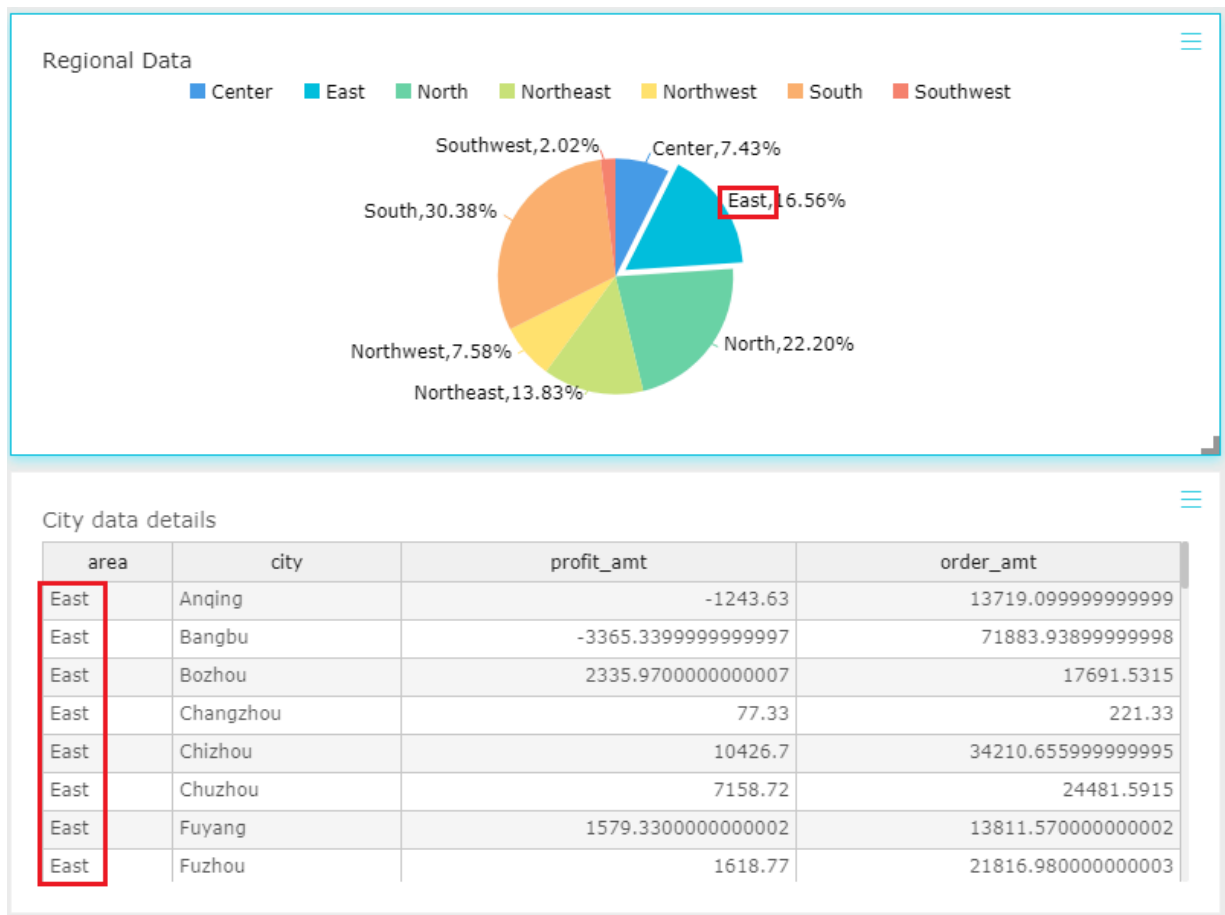
Configure a cross-chart reference on the pie chart

Click Advanced tab on pie chart. Join the pie chart with the table.

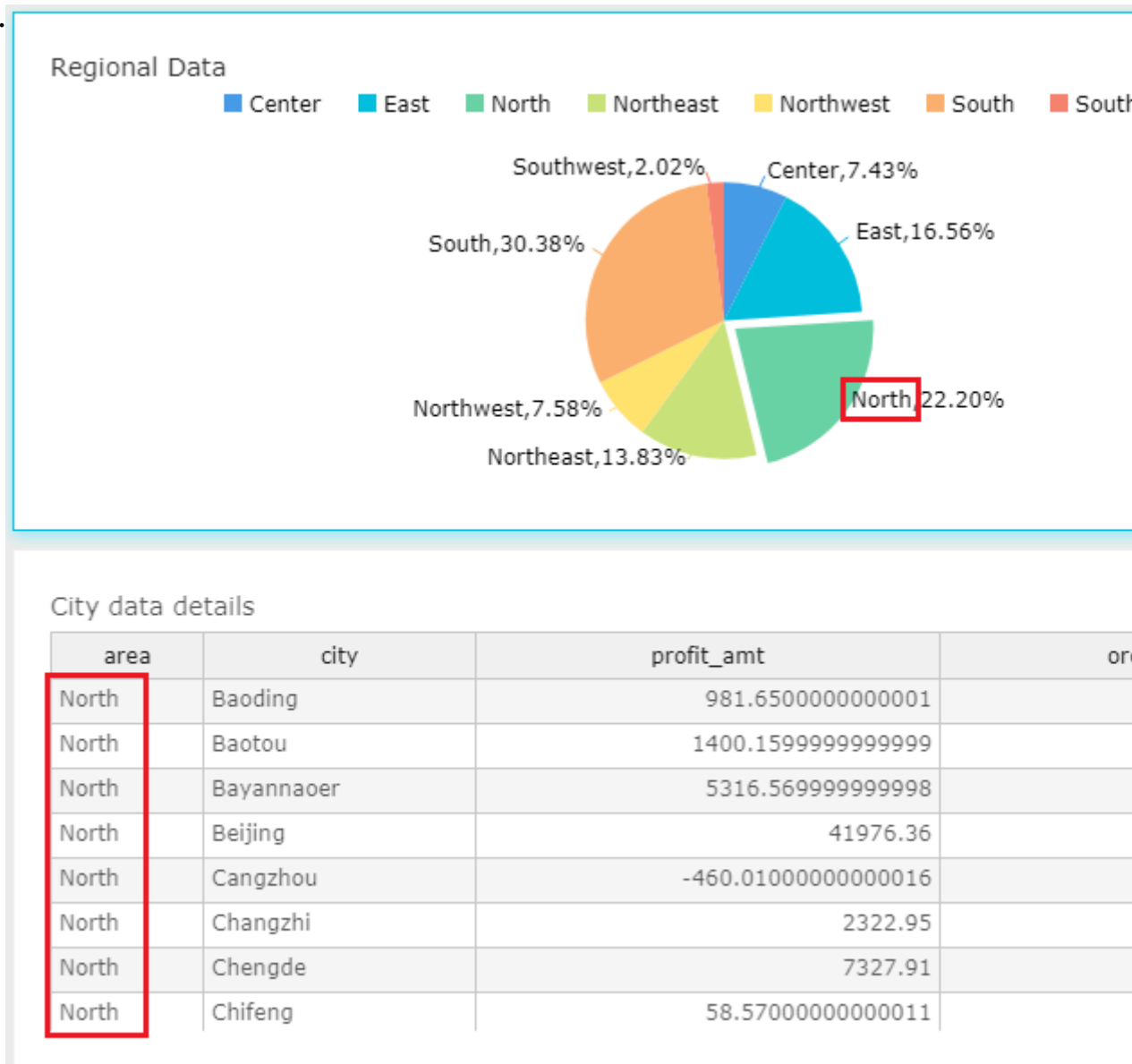
Preview correlations

Click the Preview button to view how the correlation works.

Click the East region on the pie chart, the data is shown as follows.

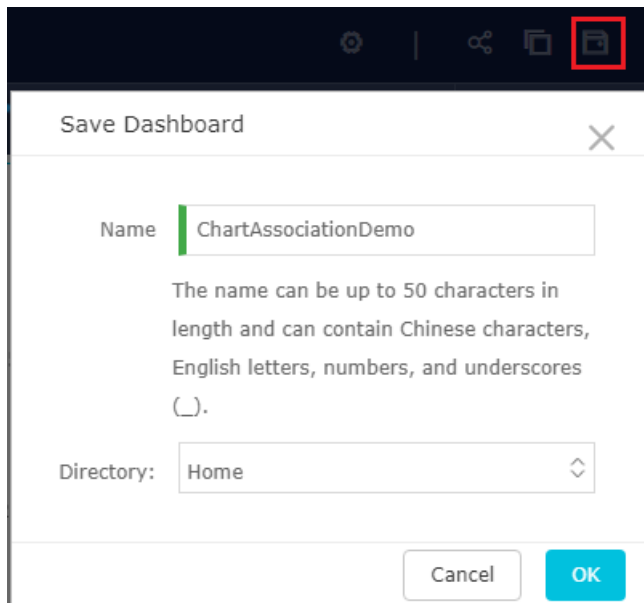


Click the North region on the pie chart, the data is shown as follows.



Save the dashboard

Save this dashboard after you complete the previous steps.



Publish the dashboard

If no sensitive data exists in a dashboard, you can publish this dashboard on the Internet.

You can publish the dashboard as shown in the following figure.

Make Public

Security Level: Public


Owner: aliyun

* Expires:

Regenerate URL: ☒

URL: <https://bi-ap-southeast-1.console.aliyun.com/instancecloud/instancecloud/ps.html?regionId=572bc73-1206-4635-834b-af5e66612508&accessToken=33825873299524ee157340479764e69>

Copy to Clipboard

Warning

When you make a work publicly available, any user can use this URL to access your dashboard. Please take proper precautions.

Close

Make Public

Make Private

1.2 Use the filter bar to search for data by date

The filter bar allows you to search for data by date. You can set the date range to search for required data.

Context

The following example uses `company_sales_record` as its dataset.

Create a data set

Procedure

1. Log on to the Quick BI console.
2. Click **Workspace > Data sources** on the left side pane to go to the data source management page.

3. Click Create Data Sources, and select a data source.

For more information about how to create a data source, see [Create a cloud data source](#), [Create a data source under self-built databases](#), and [Upload local files](#).

4. Click the Create Dataset icon. For information about how to create a dataset, see [Create a dataset](#).

Create a dashboard

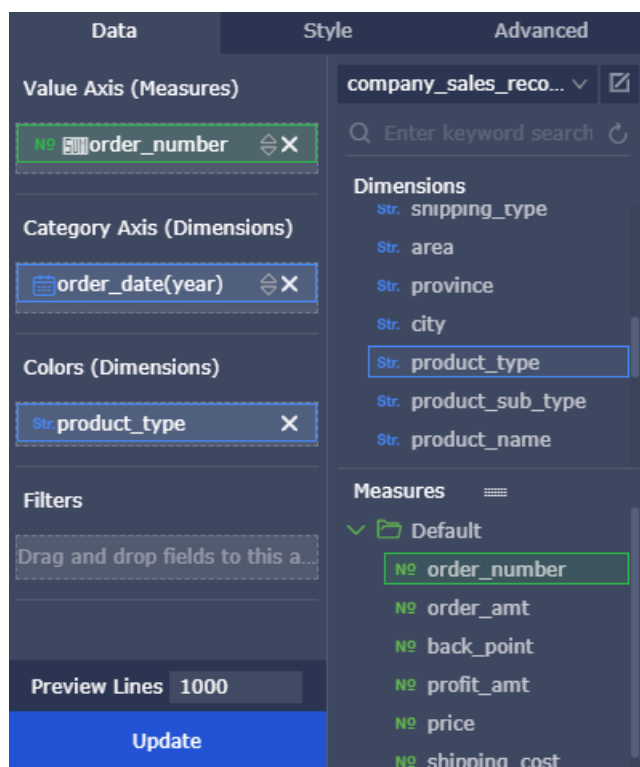
Procedure

1. Click Dashboard to go to the dashboard management page.
2. Click the dataset to switch to company_sales_record dataset.
3. Select a chart type, such as a bar chart.
4. Select a field, as shown in the following figure.



Note:

Data must contain date fields in order to be searched by date.

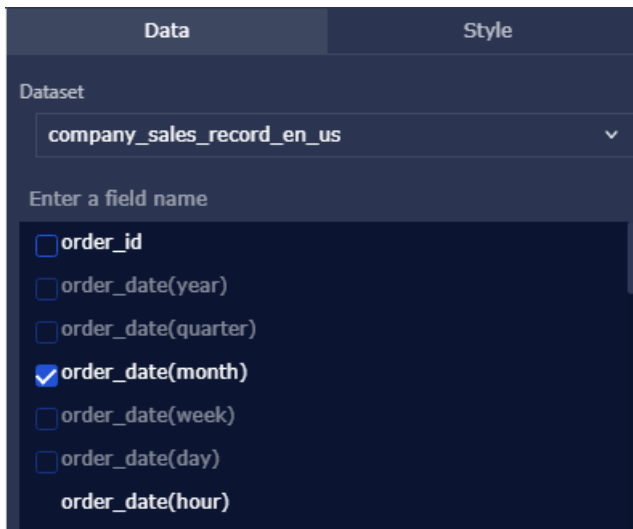


5. Click Update. The system automatically draws the chart.

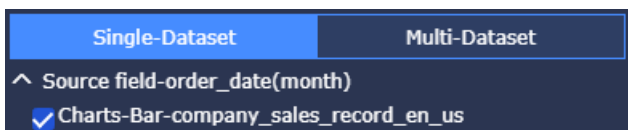
Search for data by date

Procedure

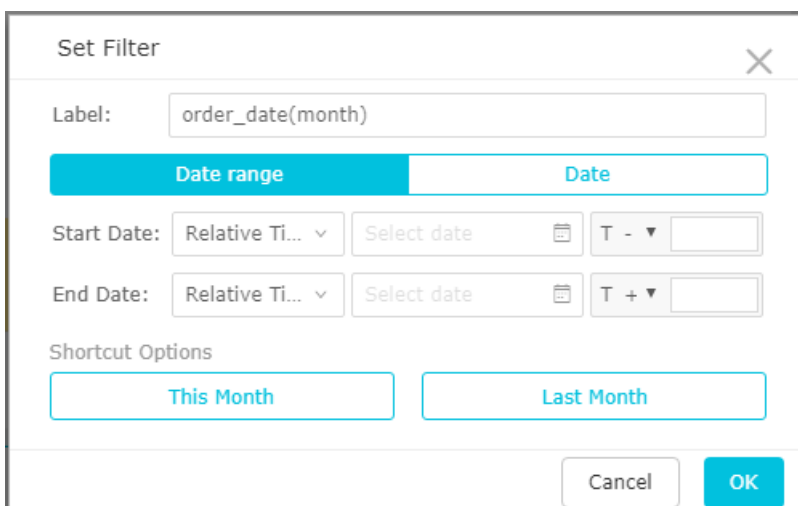
1. Double-click the Filter bar icon.
2. Select `company_sales_record` as the source dataset.
3. Select `report_date(month)` as the field to be searched for.



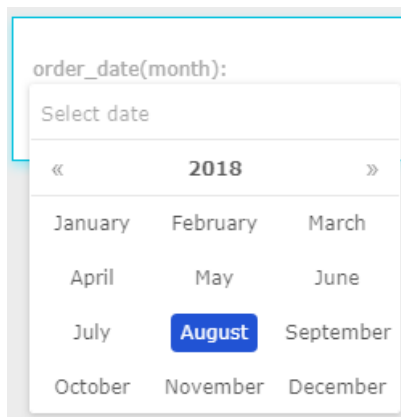
4. Click Single-Dataset, and select Bar as the associated chart, as shown in the following figure.



5. In the search box, click the field name to open the field filter menu, as shown in the following figure.



6. Select Date range and set the start and end dates in the search box, as shown in the following figure.



7. Click Search. The system updates the chart based on the specified conditions.

1.3 Create a report where different data is available to different people

For example, if a sales team serves customers across the country, they must be able to track sales data for more than 30 provinces and their cities and county regions for any time period. As the business continuously grows and scales, the team views an ever-increasing amount of sales data. With such a large amount of data, it will greatly improve efficiency and avoid data leaks if only the sales data of a region that a person is responsible for is available to them.

Row-level permissions of Quick BI make different data of a report be available to different people. This section describes the feature by taking the `company_sales_record` dataset as an example. For more information about how to create a dataset, see [Create a dataset](#).



Note:

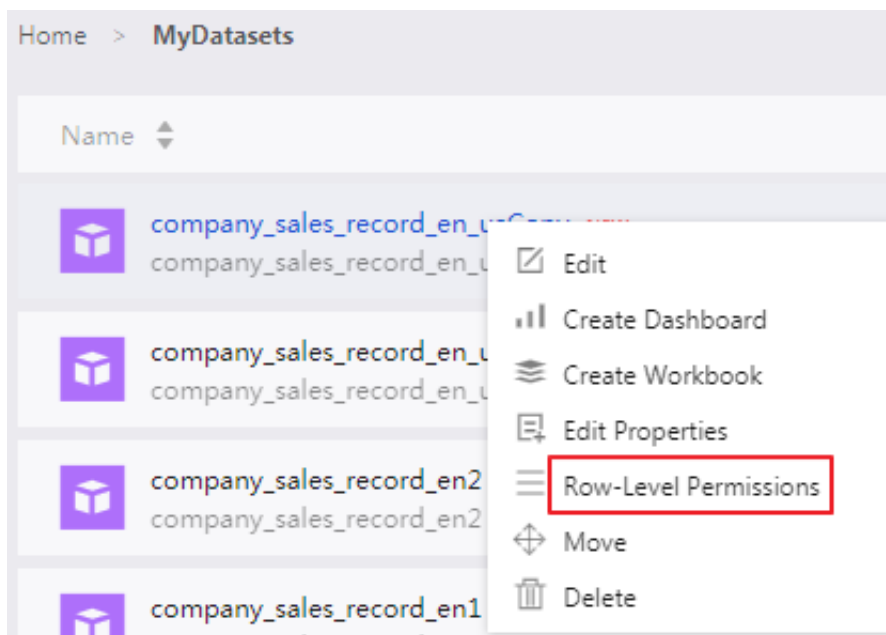
Currently, row-level permissions are only available in Quick BI Pro and Quick BI Enterprise Standard. If you want to activate Quick BI Pro or Quick BI Enterprise Standard, see [Quick BI purchase, upgrade, and renew](#).

Configure row-level permissions

You can configure the row-level permissions of a dataset in the workspace.

You must configure the row-level permissions of a dataset when it is used to create a dashboard. If the dataset does not exist in a workspace, you must add this dataset to the workspace.

1. Log on to the Quick BI console.
2. Click the Workspace tab, and select a workspace.
3. Click Dataset to enter the dataset management page of this workspace.
4. Select the required dataset. Click the ellipsis icon or right-click this dataset, and select Row-Level Permissions as shown in the following figure.



5. Select the Enable Row-Level Access Control check box, and select User / User Group Authorization.

6. Click the drop-down arrow and select a field such as area, as shown in the following figure.

Row-Level Access to Dataset company_sales_record_en_... ✕

☒ Enable Row-Level Access Control

Field area ⌵

Group

User

Search by keyword 🔍

marketing

finance

sales

市场部

销售

市场部

市场部

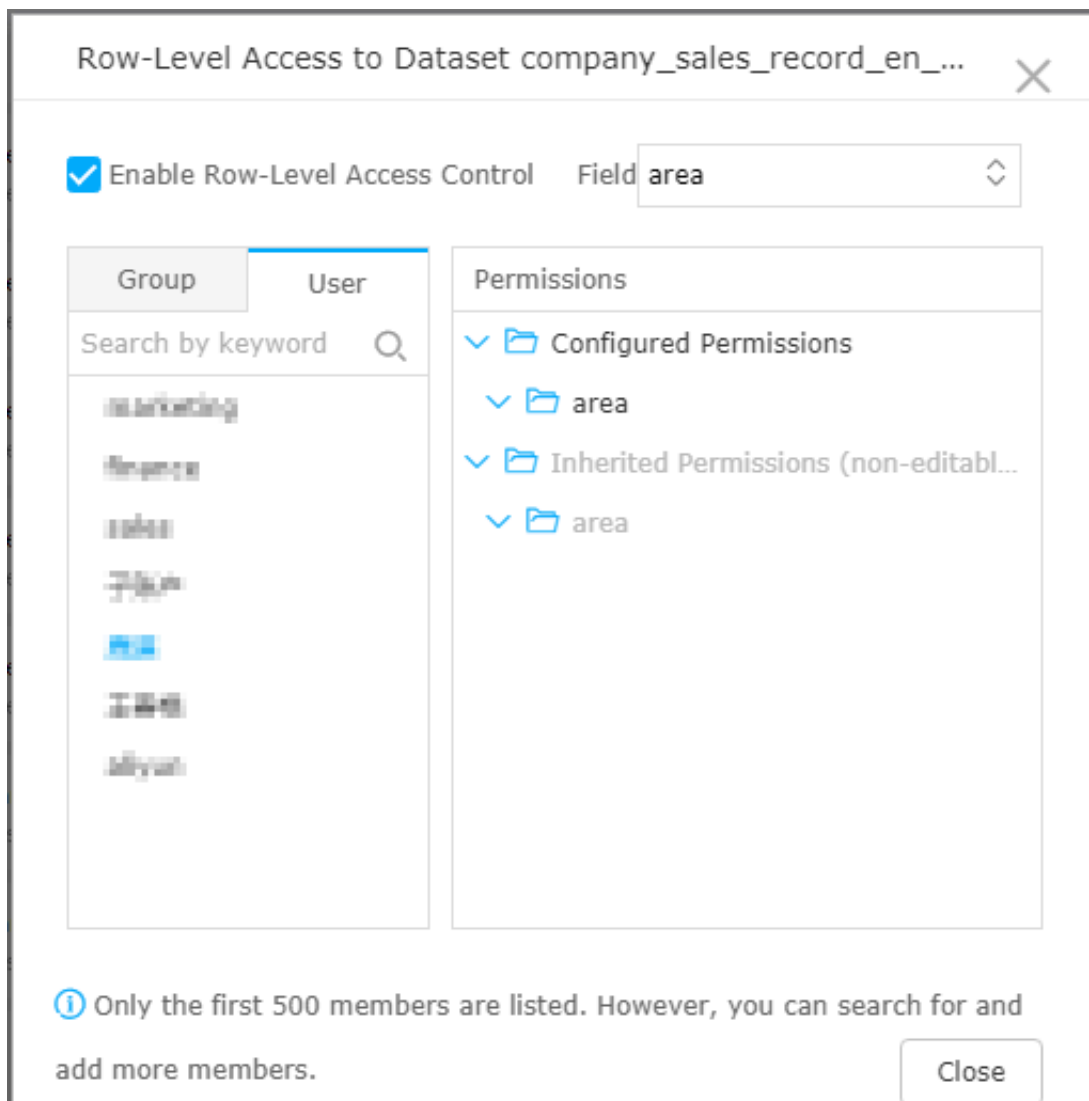
Permissions

ℹ Only the first 500 members are listed. However, you can search for and add more members.

Close

7. Select a member in the list.

After you select a member, the field automatically appears in the Permissions area as shown in the following figure.



8. Click area to expand all information contained in the field.

9. Select an area such as the selected region, and then click Add.

After you add a member, this member can only view the sales data of Northeast China.



Note:

When you configure row-level permissions for a field of a dataset, you must configure the permissions for each member to access the dataset field. If you do not configure permissions for a member to view the data, all requests to access the configured data by the member will return no data.

10. Click Close to complete the configuration.

Verify row-level permissions

1. Click Personal workspace.
2. Click Dashboard to enter the dashboard management page.
3. Locate a dashboard, click the Share icon next to this dashboard.
4. Enter the account name of the person with whom you want to share the dashboard, and select an expiration date.



Note:

Row-level permissions must be granted to the account of the person with whom you want to share the dashboard. Otherwise, you cannot check whether the permissions for the account work on the dashboard.

5. Click Save to share the report.

If row-level permissions are granted to the person with whom you want to share the dashboard, the person will be able to view the data they are authorized for, and only the data they are authorized for.

1.4 Implement multi-dataset association

The dashboard supports both single-dataset associations and multi-dataset associations to help you associate multiple charts.

Context

The dashboard supports both single-dataset associations and multi-dataset associations to help you associate multiple charts.

Multi-dataset association can associate data from different datasets. Make sure that the values of data members of association items are consistent. Otherwise, the association is invalid.

The following examples use the multi-dataset association function with the example of `company_sales_record_en_us` and `company_sales_record`, queries report content from different datasets.

Create a dataset

Procedure

1. Log on to the Quick BI console.
2. Click Workspace > Data sources to go to the data source management page.
3. Click Create Data Sources, and select a data source.

For more information about how to create a data source, see [Create a cloud data source](#), [Create a data source under self-built database](#), and [Upload local files](#).

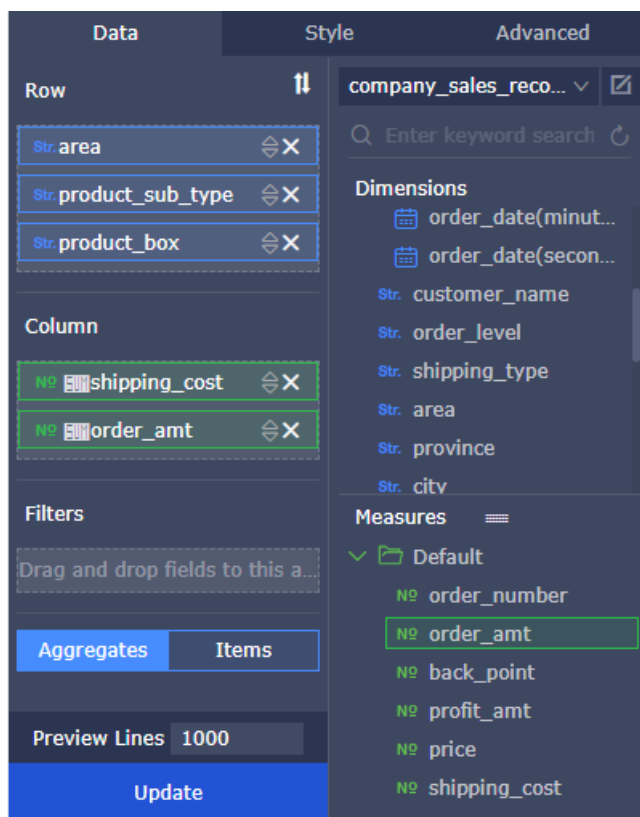
4. Click Create Dataset to create a dataset.

For more information about how to create a dataset, see [Create a dataset](#).

Create a dashboard

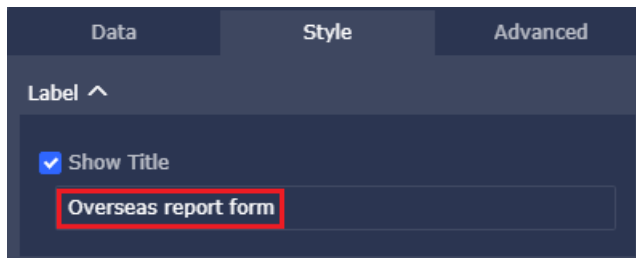
Procedure

1. Click Dashboard to go to the dashboard management page.
2. Click the dataset switch icon to select the company_sales_record_en_us dataset.
3. Select a chart type, for example, Table.
4. Select a field, as shown in the following figure.

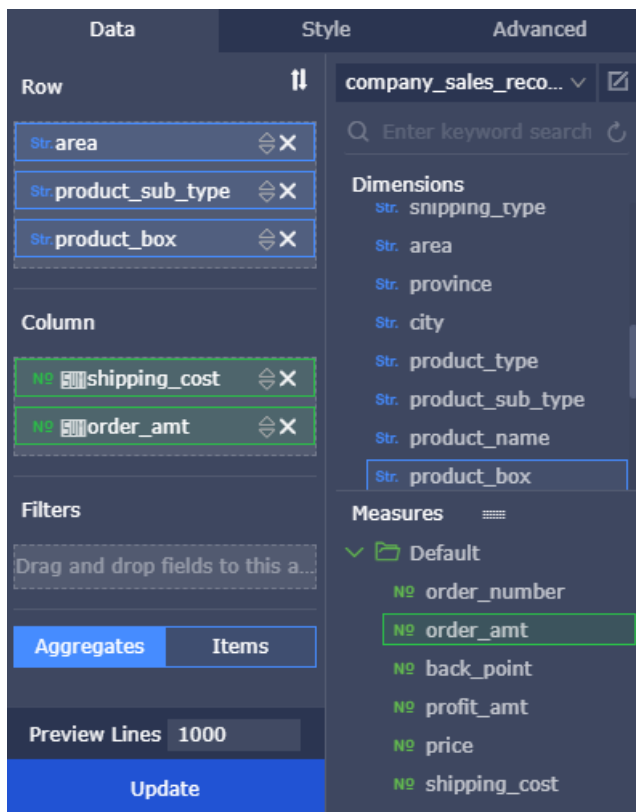


5. Click Update.

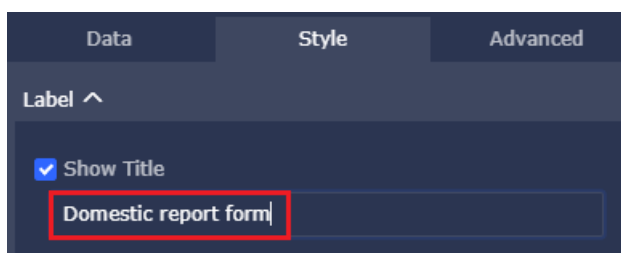
6. Click the Style tab, and rename the chart as Overseas report form, as shown in the following figure.



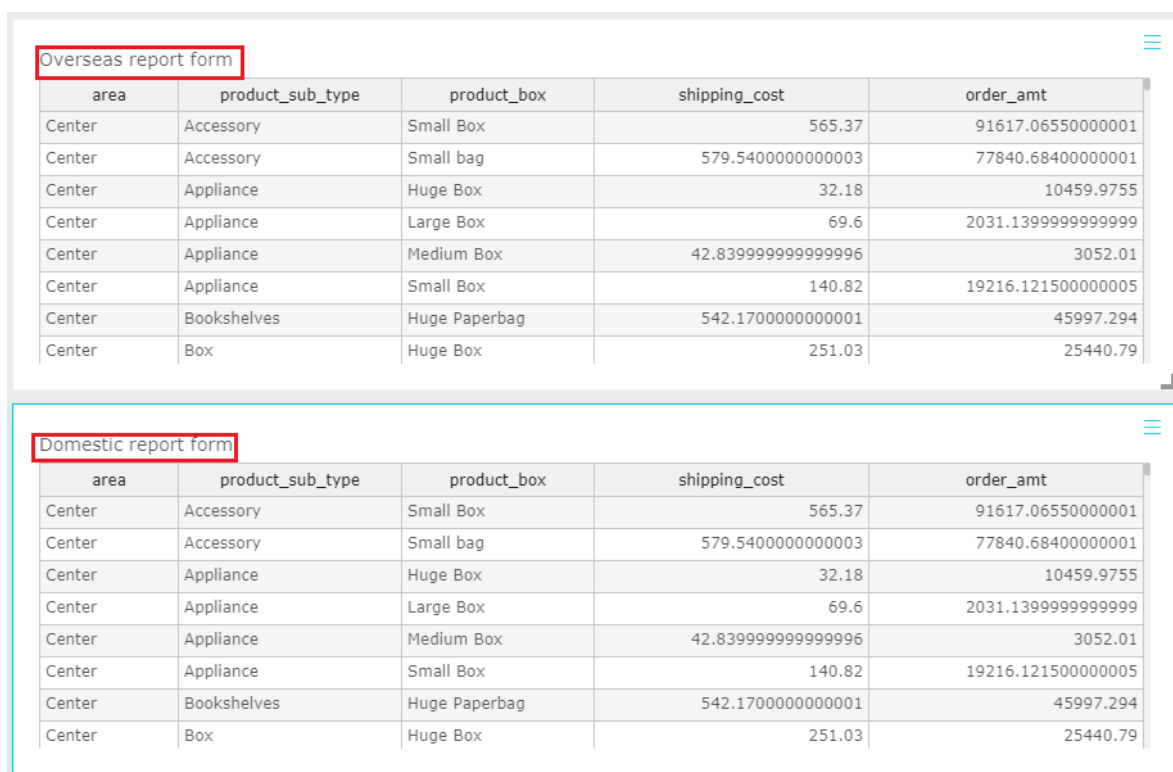
7. Click the dataset to switch to the company_sales_record dataset.
8. Select a data chart, for example, Table.
9. Select the required field, as shown in the following figure.



10. Click Update. The system automatically draws the chart.
11. Click Style, and rename the chart as Domestic report form.



12. Click Save to save the dashboard, as shown in the following figure.



Overseas report form

area	product_sub_type	product_box	shipping_cost	order_amt
Center	Accessory	Small Box	565.37	91617.06550000001
Center	Accessory	Small bag	579.5400000000003	77840.68400000001
Center	Appliance	Huge Box	32.18	10459.9755
Center	Appliance	Large Box	69.6	2031.1399999999999
Center	Appliance	Medium Box	42.839999999999996	3052.01
Center	Appliance	Small Box	140.82	19216.121500000005
Center	Bookshelves	Huge Paperbag	542.1700000000001	45997.294
Center	Box	Huge Box	251.03	25440.79

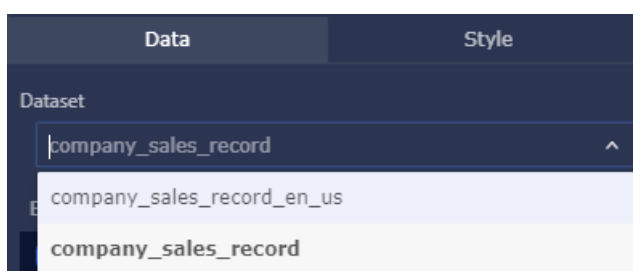
Domestic report form

area	product_sub_type	product_box	shipping_cost	order_amt
Center	Accessory	Small Box	565.37	91617.06550000001
Center	Accessory	Small bag	579.5400000000003	77840.68400000001
Center	Appliance	Huge Box	32.18	10459.9755
Center	Appliance	Large Box	69.6	2031.1399999999999
Center	Appliance	Medium Box	42.839999999999996	3052.01
Center	Appliance	Small Box	140.82	19216.121500000005
Center	Bookshelves	Huge Paperbag	542.1700000000001	45997.294
Center	Box	Huge Box	251.03	25440.79

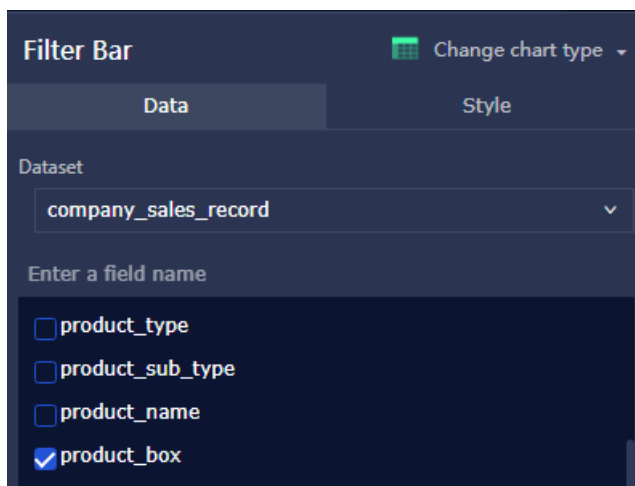
Implement multi-dataset association

Procedure

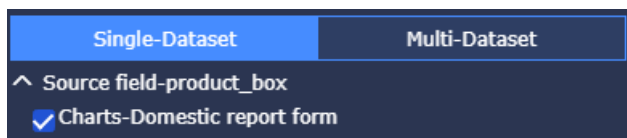
1. Click the Filter Bar control and drag the control to the top of the dashboard.
2. On the data tab, select a dataset that needs to function, for example, maid, as shown in the following figure.



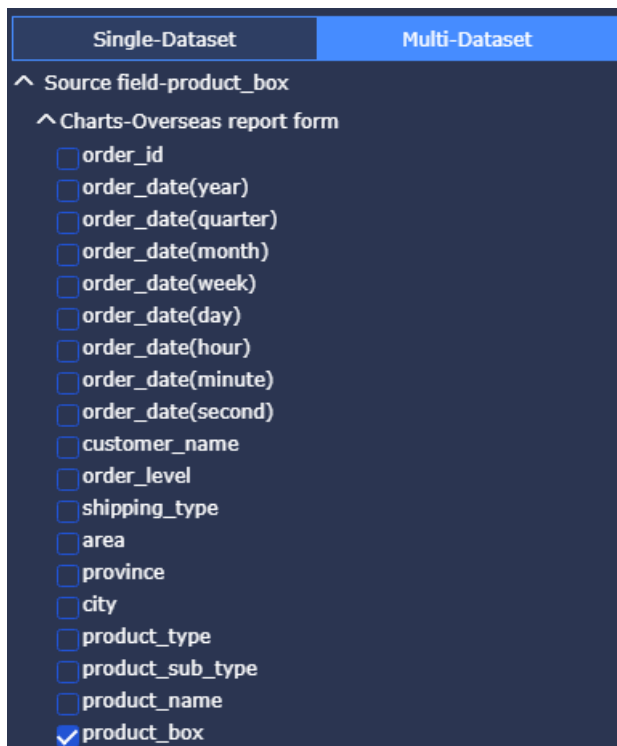
3. Select a required field, for example, product_box.



4. Click Single-Dataset, and select the domestic report form.

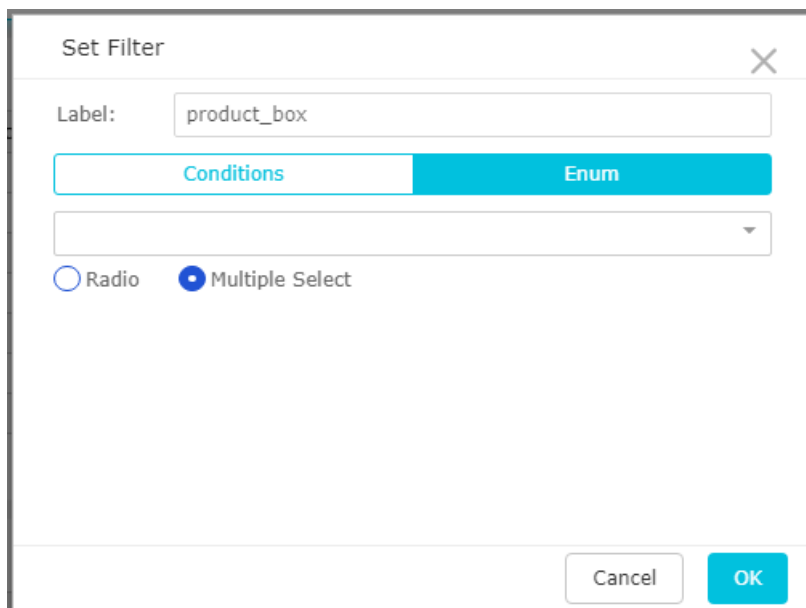


5. Click Multi-Dataset, and click the drop-down arrow next to the overseas report form to open the field list.
6. Select the field you selected on the Data page (product_box).



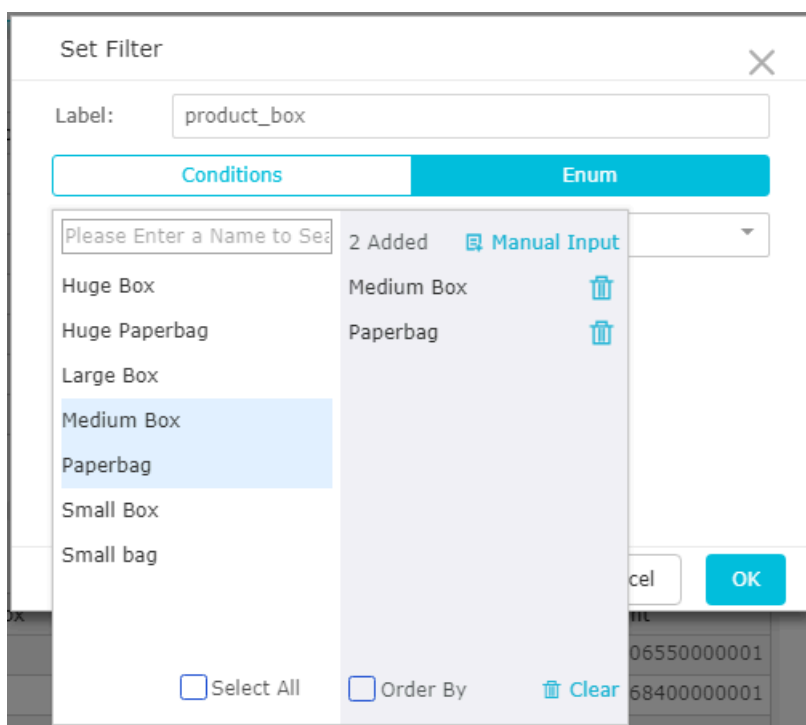
7. In the control, click Product box area to open the field filter menu.

8. Select Enum as the field filtering condition, and then select Radio or Multiple Select, as shown in the following figure.



The 'Set Filter' dialog box is shown. The 'Label' field contains 'product_box'. The 'Conditions' tab is selected, and the 'Enum' option is chosen from the dropdown menu. The 'Radio' option is selected under the 'Multiple Select' section. The 'Cancel' and 'OK' buttons are at the bottom right.

9. Click the drop-down arrow of the product box, and select the item to be filtered.



The 'Set Filter' dialog box is shown. The 'Label' field contains 'product_box'. The 'Conditions' tab is selected, and the 'Enum' option is chosen from the dropdown menu. The 'Radio' option is selected under the 'Multiple Select' section. The 'Cancel' and 'OK' buttons are at the bottom right. A list of items is displayed below the 'Enum' dropdown, including 'Huge Box', 'Huge Paperbag', 'Large Box', 'Medium Box', 'Paperbag', 'Small Box', and 'Small bag'. The 'Medium Box' and 'Paperbag' items are highlighted. The 'Manual Input' button is also visible.

10. Click Search, and the control performs the query on both the domestic and overseas report forms.

product_box: Medium Box, Paperbag Search

Overseas report form

area	product_sub_type	product_box	shipping_cost	order_amt
Center	Appliance	Medium Box	42.839999999999996	3052.01
Center	Box	Medium Box	6.5	96.01
Center	Chair	Medium Box	69.15	14113.851999999999
Center	Decorator	Medium Box	129.57	26082.379500000003
Center	Decorator	Paperbag	62.21	9524.93
Center	Machines	Medium Box	205.73000000000002	48607.869999999995
Center	Paper	Paperbag	312.92999999999995	55140.079500000001
Center	Pen	Paperbag	218.44000000000003	23750.8855

Domestic report form

area	product_sub_type	product_box	shipping_cost	order_amt
Center	Appliance	Medium Box	42.839999999999996	3052.01
Center	Box	Medium Box	6.5	96.01
Center	Chair	Medium Box	69.15	14113.851999999999
Center	Decorator	Medium Box	129.57	26082.379500000003
Center	Decorator	Paperbag	62.21	9524.93
Center	Machines	Medium Box	205.73000000000002	48607.869999999995
Center	Paper	Paperbag	312.92999999999995	55140.079500000001
Center	Pen	Paperbag	218.44000000000003	23750.8855

1.5 Use the Filter Bar to search for data

The Filter Bar allows you to search for data. You can set the data range to search for data you need.

Context

Example: Search for provinces and cities where the order amount is between 2,500 and 4,500.

The following example uses company_sales_record as its dataset.

Create a dataset

Procedure

1. Log on to the Quick BI console.
2. Click Workspace > Data sources to go to the data source management page.

3. Click Create Data Sources, and select a data source.

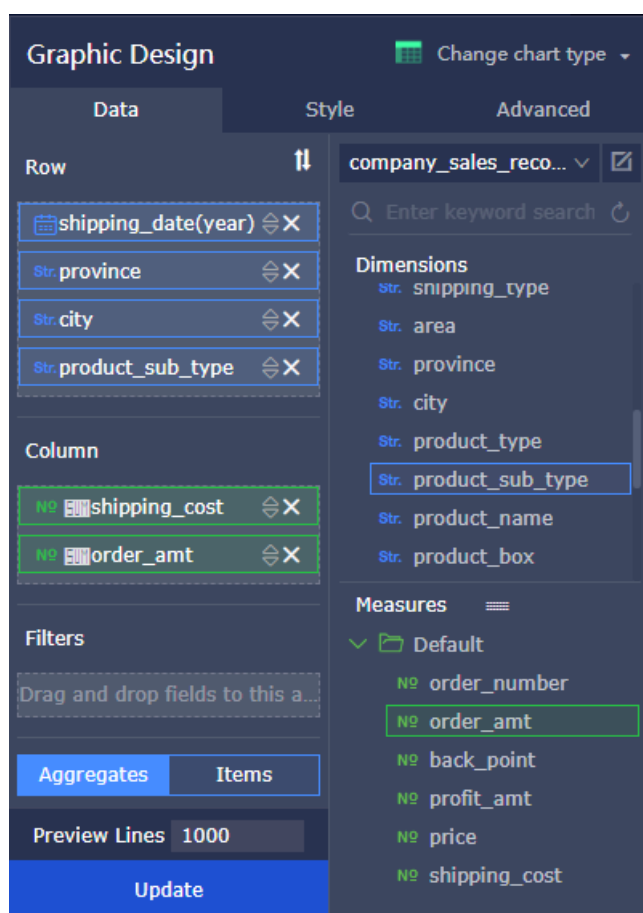
For more information about how to create a data source, see [Create a cloud data source](#), [Create a Data Source from External Database](#), and [Upload Local Files](#).

4. Click Create Dataset to create a dataset.

Create a dashboard

Procedure

1. Click Dashboard to go to the dashboard management page.
2. Click the dataset to switch to the company_sales_record dataset.
3. Select a chart type, for example, Table.
4. Select a field, as shown in the following figure.



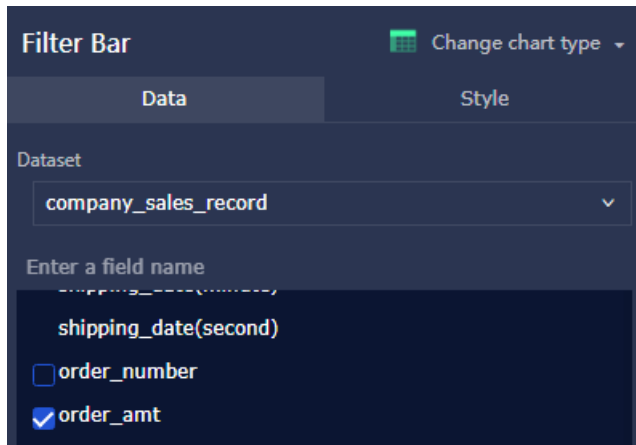
5. Click Update, and the system automatically draws a chart.

Search for data

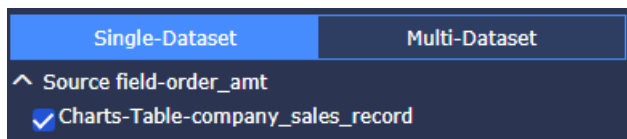
Procedure

1. Click Filter Bar.

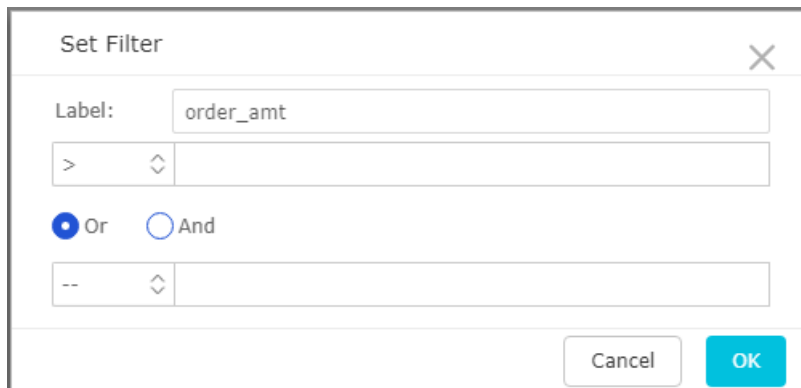
2. Select company_sales_record as the source dataset.
3. Select order amount as the search field, as shown in the following figure.



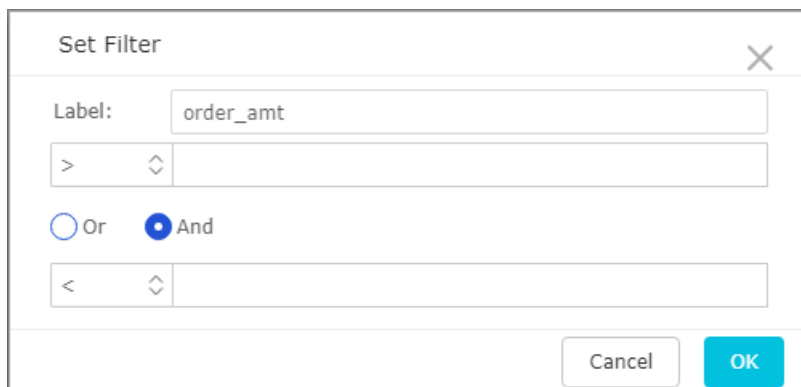
4. Click Single-Dataset, and select the table as the associated chart, as shown in the following figure.



5. In the query box, click the field name to open the field filtering menu.



6. Set the search range for the numeric values, as shown in the following figure.



7. Enter a range to search for the amount between these two numbers, as shown in the following figure.

The screenshot shows a search filter control for the field 'order_amt'. It features two input boxes: the first contains '>' and '2500', and the second contains '<' and '4500'. A blue 'Search' button is located to the right of the inputs. Above the inputs are icons for settings (gear) and deletion (trash). A hamburger menu icon is in the top right corner.

8. Click Search and the chart associated with the control is updated automatically.

The numbers of order amount between 2,500 and 4,500 in the table are shown in the following figure.

Table-company_sales_record

shipping_date(year)	province	city	product_sub_type	shipping_cost	order_amt
2013	Anhui	Bozhou	Box	29.3	2,990.6
2013	Anhui	Bozhou	Telephone	5.9	4,008.7
2013	Anhui	Huaibei	Telephone	5.3	2,860.9
2013	Anhui	Liuan	Pen	13.1	3,517.8
2013	Anhui	Suzhou	Telephone	94.6	3,734.0
2013	Anhui	Tongling	Decorator	28.1	3,313.9
2013	Gansu	Lanzhou	Table	29.2	3,905.8
2013	Guangdong	Chaozhou	Chair	30.0	3,041.3

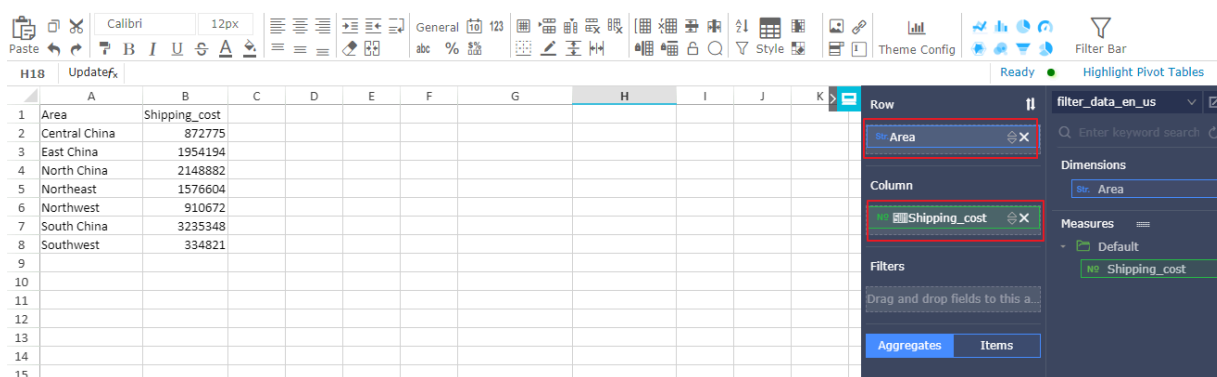
1.6 Use filters in a workbook

You can use Filter, Filter Bar, Filters to filter data. You can set filter conditions as required to obtain the required results.

Scenario: Compare shipping costs for East China, South China, and North China. This example is based on the company_sales_record dataset.

Prepare a workbook

You can create the following workbook based on the company_sales_record dataset and name it Shipping costs. For more information basic workbook operations, see [Workbook overview](#) and [Create a workbook](#).



Filter

The filter is a feature of a workbook. You can use a filter to filter data of a workbook.

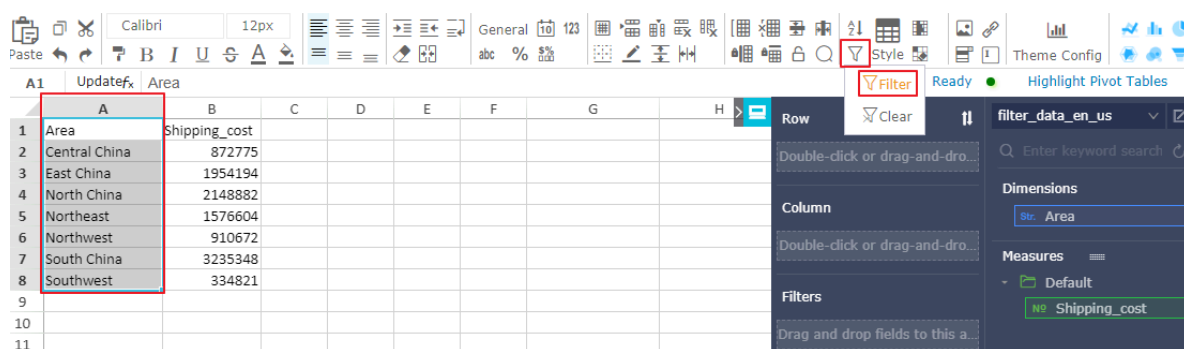
1. In the Shipping costs workbook, select the area column or all of the data contained in the column.



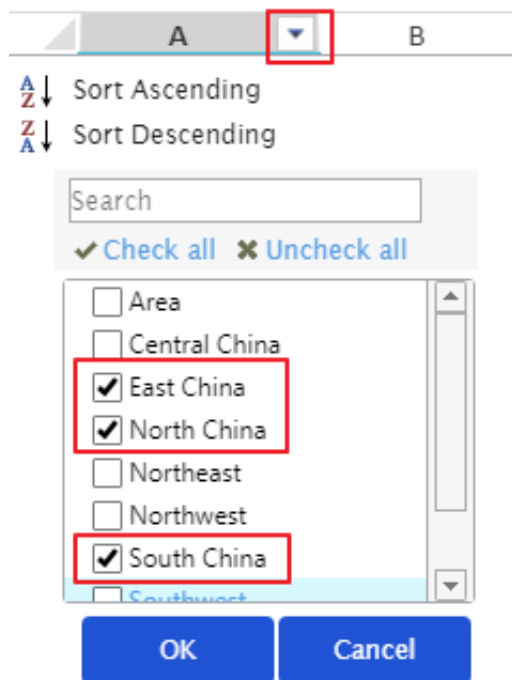
Note:

You must select the area column or all of the data contained in the column to ensure a successful filter.

2. Click the Filter icon, select Filter as shown in the following figure.



- Click the drop-down arrow for the area column, select East, South, and North, and click OK as shown in the following figure.



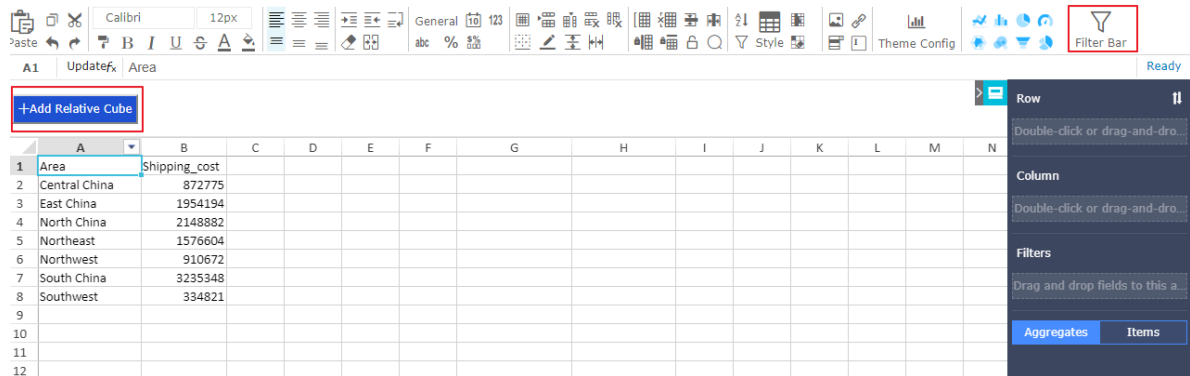
The filter results are shown in the following figure.

	A	B
3	East China	1954194
4	North China	2148882
7	South China	3235348

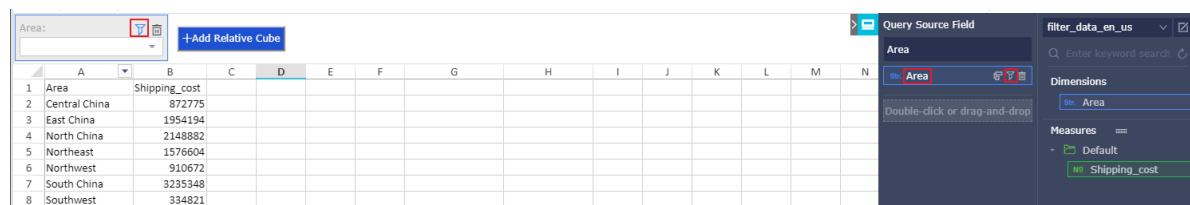
Filter bar

You can use Filter Bar to filter target data.

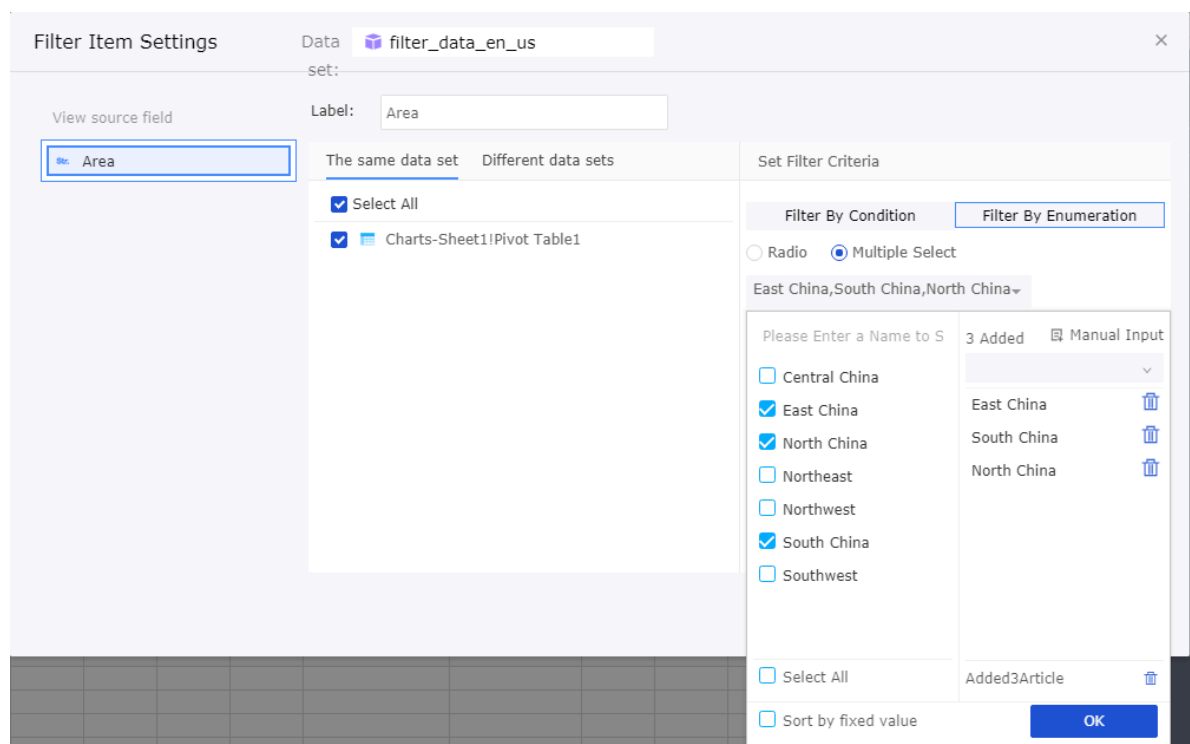
1. In the Shopping costs workbook, click Filter Bar and +Add Correlated Datasets as shown in the following figure.



2. Double click the area field or drag this field to the Filter Fields area and click the Set Filter icon as shown in the following figure.



3. In the Set Filter dialog box, configure the options as shown in the following figure and choose OK > OK.



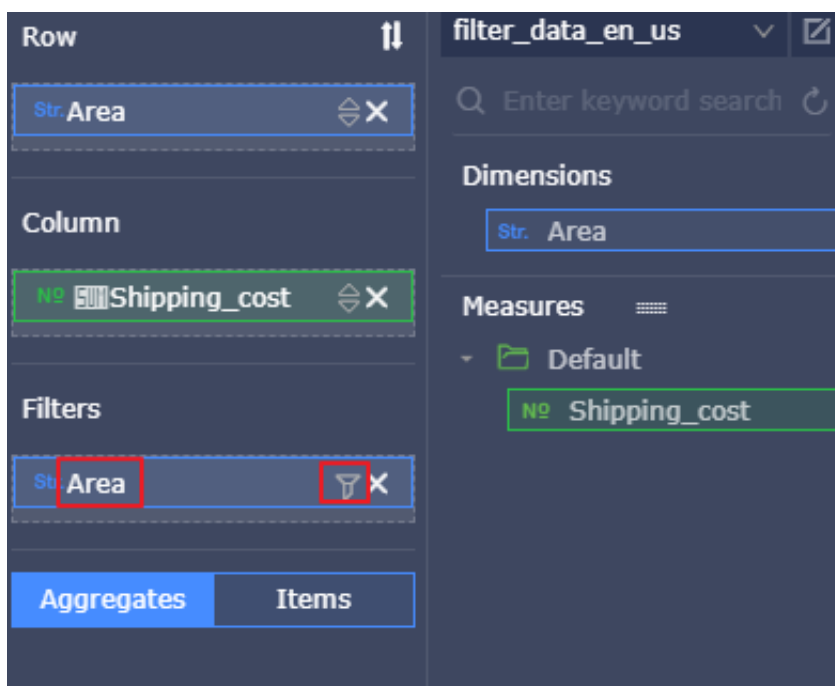
4. Click Search to obtain the results as shown in the following figure.

Area:	Area:	+Add Relative Column	Search
East China,South China...	East China,North China...		
A	B	C	D
1 Area	Shipping_cost		
2 East China	1954194		
3 South China	3225348		
4 North China	2148882		

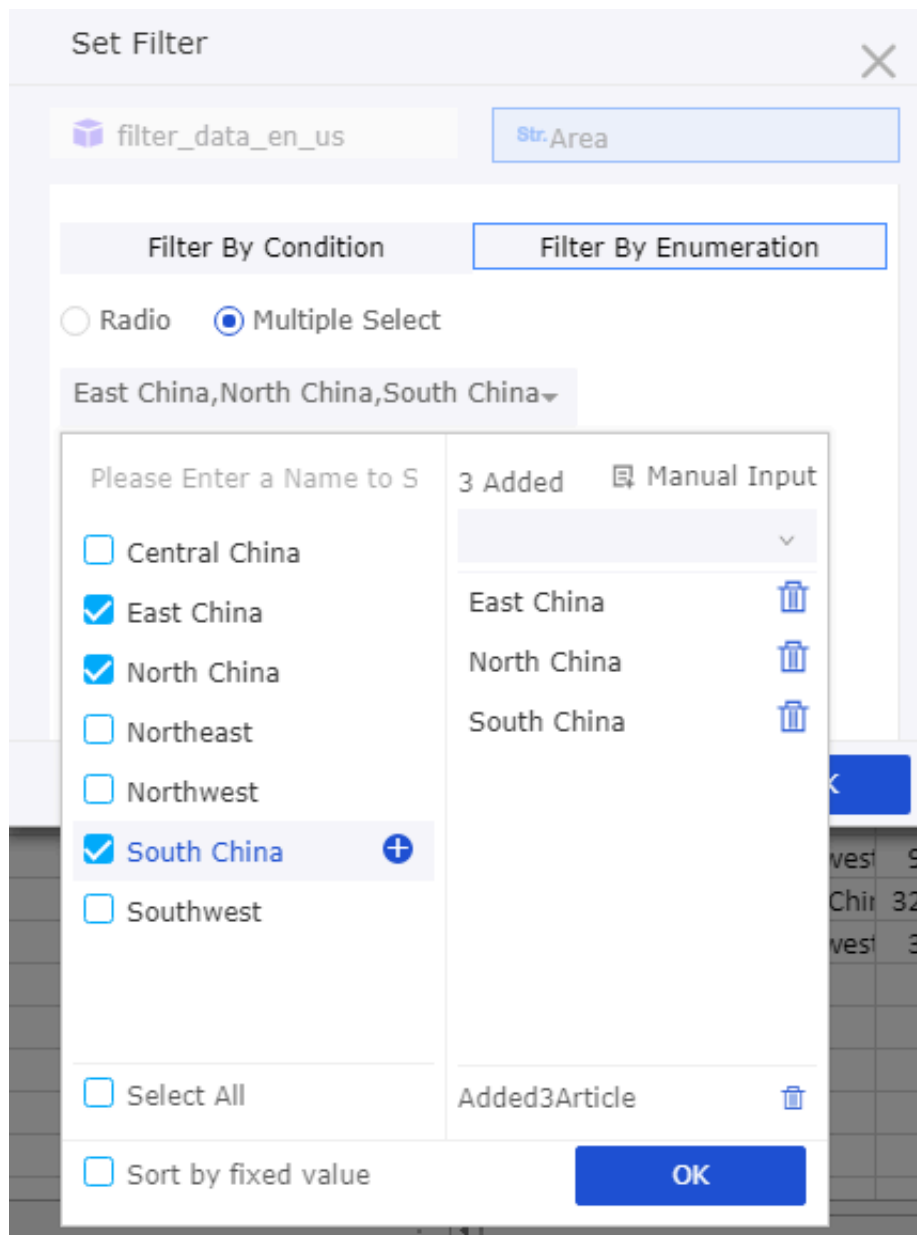
Filters

When you create a workbook, you can use the Filters feature to filter data.

1. When you create a workbook, drag the area field to the Filters area and click the Set Filter icon as shown in the following figure.



2. In the Set Filter dialog box, configure the options as shown in the following figure and choose OK > OK.



3. Click Update. The filter results are shown in the following figure.

	A	B	C	D	E
1	Area	Shipping_cost			
2	East China	1954194			
3	North China	2148882			
4	South China	3235348			
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					

1.7 Use Filter Bar to filter data by a date range

You can use the Filter Bar widget to filter data by a date range. You can obtain target data that falls within a specified range of dates. This example is based on the `company_sales_record` dataset.

Create a dataset

1. Log on to the Quick BI console.
2. Click Workspace > Datasets to enter the Datasets page.
3. Click Create Data Sources to select a data source.



Note:

For more information about how to create a data source, see [Create a cloud data source](#), [Create a data source from an external database](#), and [Upload local files](#).

4. Click the Create Dataset icon to [Create a dataset](#).

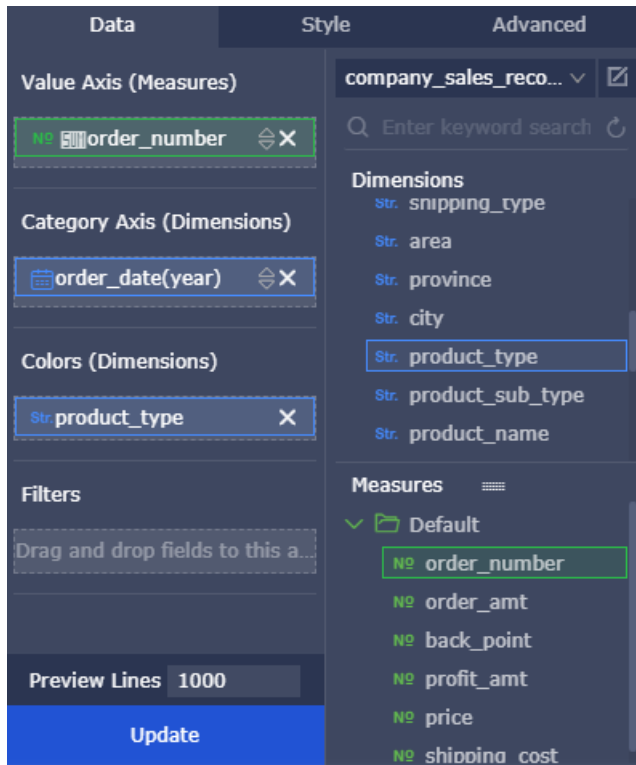
Create a dashboard

1. Click Dashboards to enter the Dashboards page.
2. On the Data tab, select the `company_sales_record` dataset.
3. Select a chart such as Pie.
4. Select a field as shown in the following figure.



Note:

If you want to filter a dataset by date, the dataset must include at least one field of the Date type.



5. Click Update to update the chart.

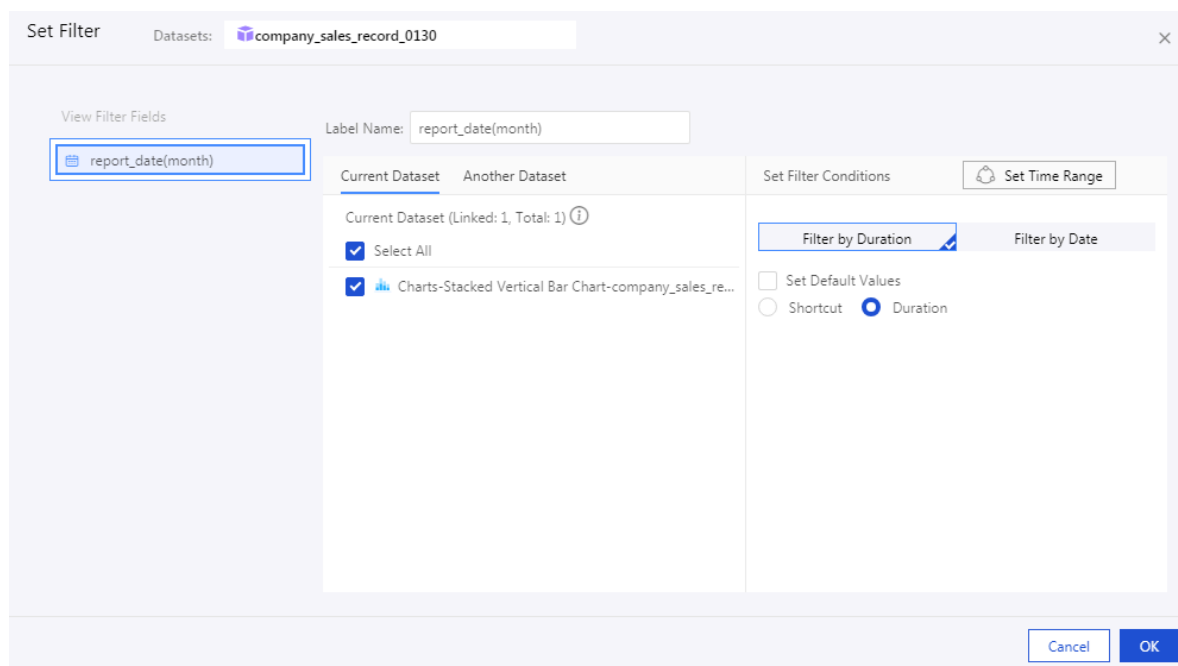
Filter data by a date range

1. Click the Filter Bar icon.
2. Select company_sales_record as the dataset.
3. Select the report_date(month) field as a filter field as shown in the following figure.



4. Click the Set Filter icon.

5. In the Set Filter dialog box, select Single-Dataset and select Charts-Bar as a correlated chart. You can configure the options in the Set Filter dialog box. as shown in the following figure.



6. Click OK to complete the filter configuration.
7. Click Search to update the chart based on the specified filter conditions.

1.8 Use filters in a dashboard

In a dashboard, you can use filters to filter data to refine the results for a report. You can obtain the required data that meets the specified filter conditions.

Scenario: Compare shipping costs for East China, South China, and North China based on the company_sales_record dataset.

Create a dataset

1. Log on to the Quick BI console.
2. Choose Workspace > Data Source to enter the Data Sources page.
3. Click Create Data Sources to select a data source.



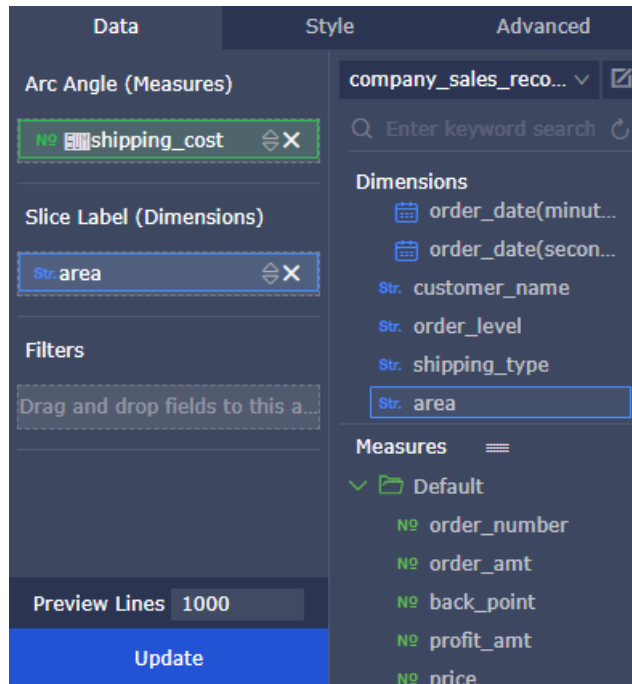
Note:

For more information about how to create a data source, see [Create a cloud data source](#), [Create a data source from an external database](#), and [Upload local files](#).

4. Click the Create Dataset icon to [create a dataset](#).

Create a dashboard

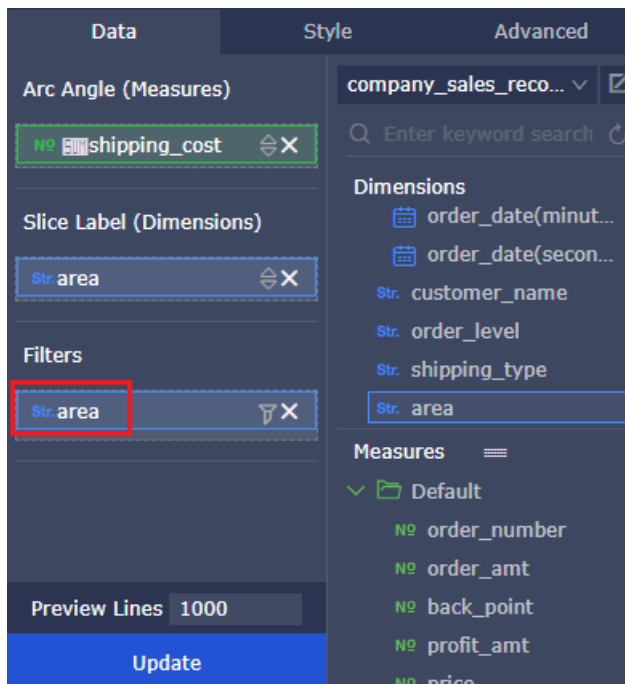
1. Click Dashboards to enter the Dashboards page.
2. Click the Switch dataset icon, and select the company_sales_record dataset.
3. Select a chart such as a pie chart.
4. Select a field as shown in the following figure.



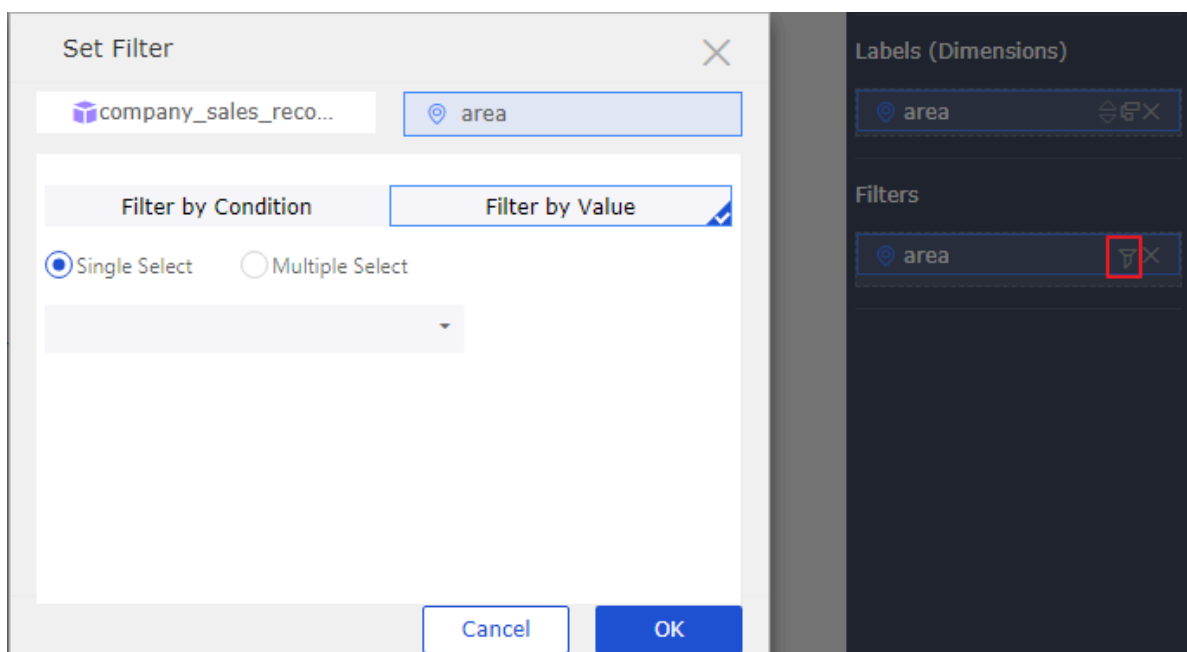
5. Click Update. A chart is generated automatically.

Filter data

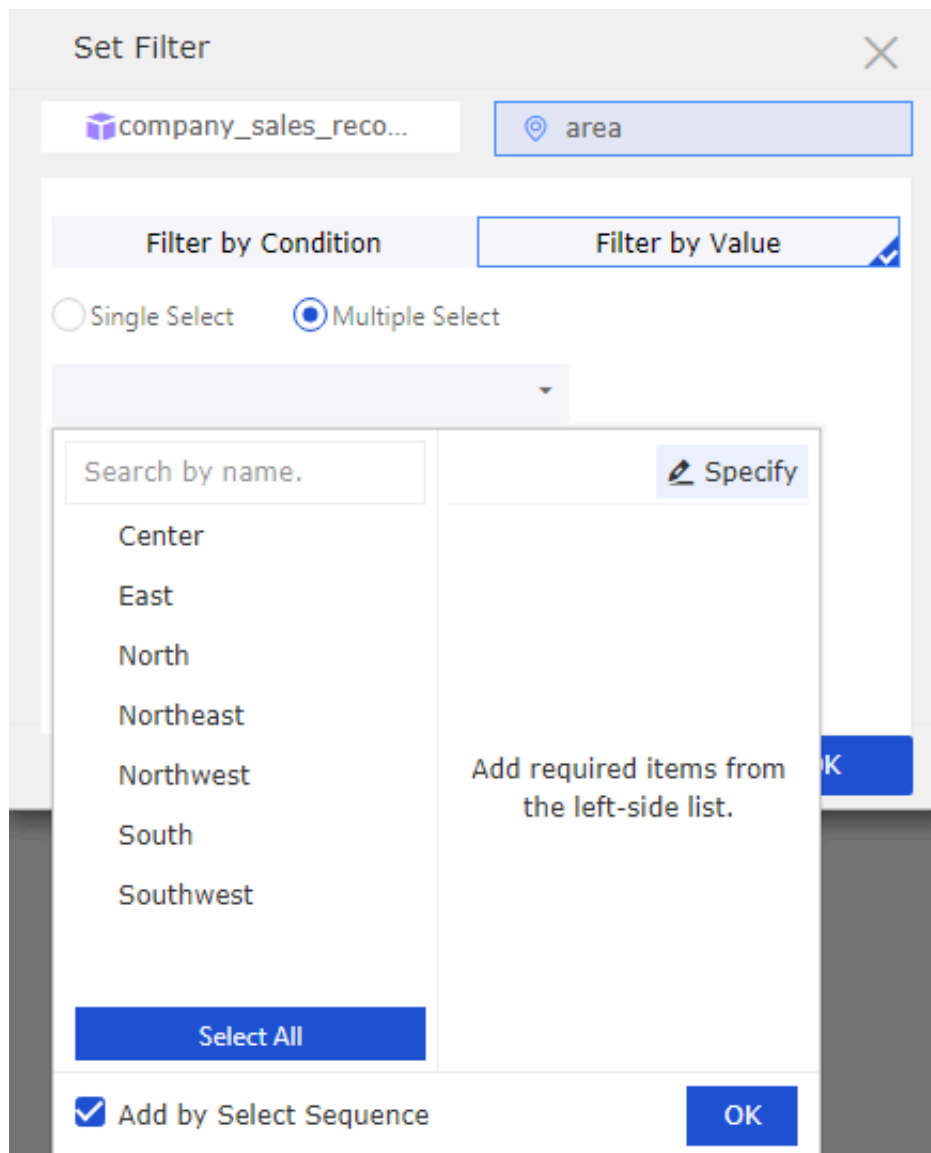
1. Drag the area field to the Filters area as shown in the following figure.



2. Click Filters icon to set filter conditions as shown in the following figure.

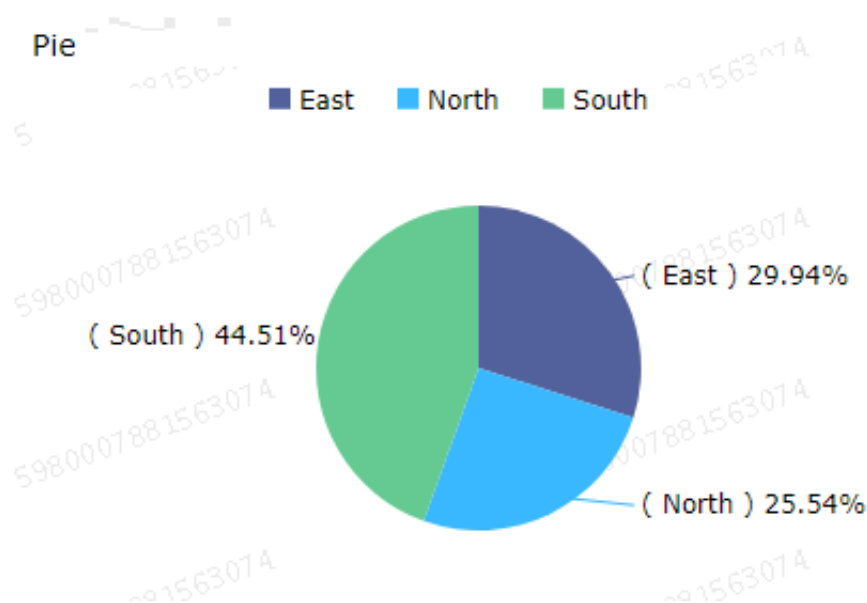


3. Choose Enum > Multiple Select and click the drop-down arrow to list all options as shown in the following figure.



4. Select East, North, and South and click OK.

- Click Update to update the chart. The chart shows only the comparison results of shipping costs for East China, North China, and South China as shown in the following figure.



1.9 Associate multiple datasets with a dashboard

When you configure a cross-chart reference, you can associate a single dataset or multiple datasets with available charts in a dashboard. When you want to compare data from multiple datasets, you must select an associated field from each dataset. Some values of these selected fields must be the same. Otherwise, you cannot compare multiple datasets. This example is based on the `company_sales_record_en_us` and `company_sales_record` datasets.

Create a dataset

- Log on to the Quick BI console.
- Choose Workspace > Datasets to enter the Datasets page.
- Click Create Data Sources to select a data source.



Note:

For more information about how to create a data source, see [Create a cloud data source](#), [Create a data source from an external database](#), and [Upload local files](#).

- Click the Create Dataset icon to [Create a dataset](#).

Create a dashboard

- Click Dashboards to enter the Dashboards page.

2. On the Data tab, select the company_sales_record_en_us dataset.
3. Select a chart such as table.
4. Select the required fields.
5. Click Update to update the chart.
6. Click the Style tab, rename the chart to Overseas report as shown in the following figure.
7. On the Data tab, select the company_sales_record dataset.
8. Select a chart and fields, such as table.
9. Click Update to update the chart.
10. Click the Style tab, rename the chart Domestic report.
11. Click Save to save the dashboard.

Associate multiple datasets with a dashboard

1. Click the Filter Bar control, and drag the control at the top of the dashboard.
2. On the data tab, select a dataset, such as company_sales_record.
3. Select a field to be filtered such as product_box.
4. Click the Set Filter icon.
5. In the Set Filter dialog box, click the Single-Dataset tab and select Domestic report.
6. Click the Multi-Dataset tab, and click the drop-down arrow of Overseas report to view the field list.
7. Select the product_box field.
8. In the Set Filter area, click Filter by Enumeration and select Radio or Multiple Select.
9. Click the drop-down arrow of product_box, select the values to be filtered, and click OK.
10. Click Search to obtain the query results from both the Overseas report chart and the Domestic report chart.

1.10 Use Filter Bar to filter data by a number range

You can use the Filter Bar widget to filter data by a number range. You specify a range to filter data based on your requirements.

Scenario: Filter the company_sales_record dataset by provinces and cities with values between 2,500 and 4,500.

Create a dataset

1. Log on to the Quick BI console.
2. Click Workspace > Datasets to enter the Datasets page.
3. Click Create Data Sources to select a data source.



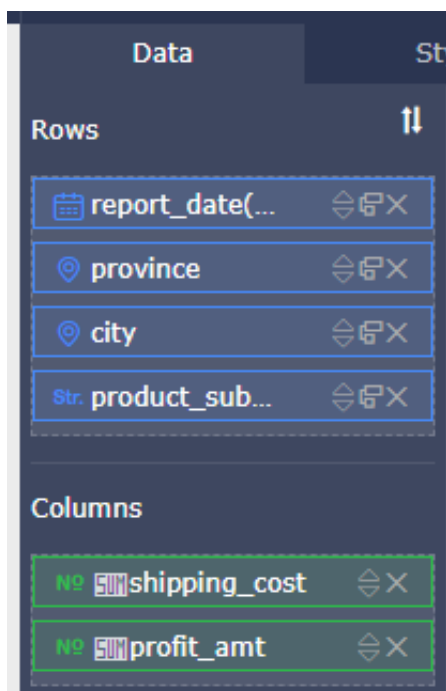
Note:

For more information about how to create a data source, see [Create a cloud data source](#), [Create a data source from an external database](#), and [Upload local files](#).

4. Click the Create Dataset icon to [create a dataset](#).

Create a dashboard

1. Click Dashboards to enter the Dashboards page.
2. On the Data tab, select the company_sales_record dataset.
3. Select a chart such as Table.
4. Select a field as the following figure shows.

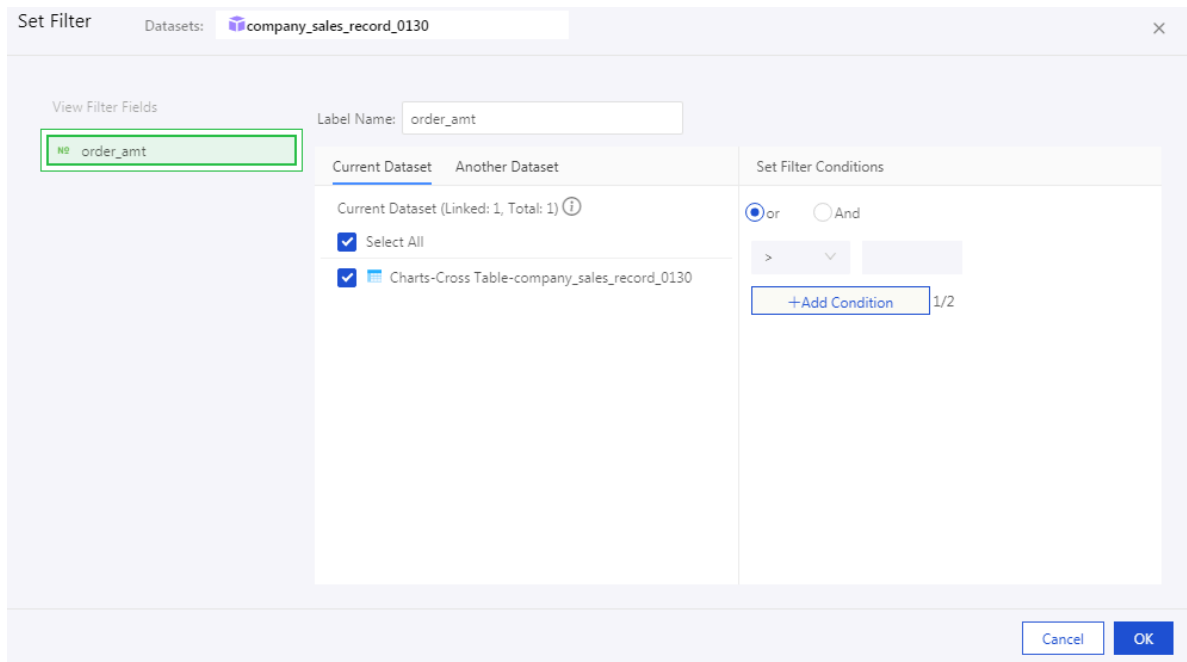


5. Click Update to automatically generate the chart.

Filter data by a number range

1. Click the Filter Bar icon.
2. Select the company_sales_record dataset as a dataset and order_amt as a filter field.
3. Click the Set Filter icon.

4. In the Set Filter dialog box, click the Single-Dataset tab, and select the table as the associated chart as shown in the following figure.



5. In the Filter Bar widget, set a number range.
6. Enter two numbers for this filter range, which is greater than 2,500 and less than 4,500 as shown in the following figure.



7. Click the Search button to automatically update the associated charts. You can obtain the results whose order amount ranges from 2,500 to 4,500 as shown in the following figure.

shipping_date(year)	province	city	product_sub_type	shipping_cost	order_amt
2013	Anhui	Bozhou	Box	29.3	2,990.6
2013	Anhui	Bozhou	Telephone	5.9	4,008.7
2013	Anhui	HuaiBei	Telephone	5.3	2,860.9
2013	Anhui	Liuan	Pen	13.1	3,517.8
2013	Anhui	Suzhou	Telephone	94.6	3,734.0
2013	Anhui	Tongling	Decorator	28.1	3,313.9
2013	Gansu	Lanzhou	Table	29.2	3,905.8
2013	Guangdong	Chaozhou	Chair	30.0	3,041.3