Alibaba Cloud

Quick BI Data analysis

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Document conventions

| Style | Description | Example |
|--------------|--|--|
| A Danger | A danger notice 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. |
| O Warning | A warning notice 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 restart an instance. |
| C) Notice | A caution notice indicates warning information, supplementary instructions, and other content that the user must understand. | Notice: If the weight is set to 0, the server no longer receives new requests. |
| ⑦ Note | A note indicates supplemental instructions, best practices, tips, and other content. | Onte: You can use Ctrl + A to select all files. |
| > | Closing angle brackets are used to indicate a multi-level menu cascade. | Click Settings> Network> Set network type. |
| Bold | Bold formatting is used for buttons , menus, page names, and other UI elements. | Click OK. |
| Courier font | Courier font is used for commands | Run the cd /d C:/window command to enter the Windows system folder. |
| Italic | Italic formatting is used for parameters and variables. | bae log listinstanceid Instance_ID |
| [] or [a b] | This format is used for an optional value, where only one item can be selected. | ipconfig [-all -t] |
| {} or {a b} | This format is used for a required value, where only one item can be selected. | switch {active stand} |

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1.Data analysis overview

Data analysis is the last mile of data-assisted decision-making. It is used to visualize data and explore data value. An appropriate data display mode can help analysts improve their analysis efficiency.

- Dashboards: provides nearly 40 types of charts and allows you to easily perform operations on the charts. If you subscribe to Quick BI Enterprise Standard, you can configure metrics in group workspaces to monitor exceptions. Dashboards are suitable for all users who require visualized data analysis.
- Workbooks: provides more than 400 EXCEL functions. You can use the workbooks feature to analyze various types of EXCEL reports. Workbooks are suitable for users who are familiar with EXCEL operations.

Onte The workbooks feature is supported in group workspaces of Quick BI Pro and Quick BI Enterprise Standard.

• **BI portals**: provides a set of menus used for thematic analysis. A BI portal incorporates analysis data of a specified topic so that users can quickly locate the required analysis data.

Data analysis flowchart

- Create a dashboard
- Manage dashboards
- Workbooks
- BI port als

2.Create dashboards

2.1. Dashboard overview

This topic describes the basic concepts of a dashboard, including the chart types, scenarios, and chart elements.

For more information about the basic operations on a dashboard, see Dashboard basic operations.

For more information about creating charts, see Create a chart.

The dashboard provides a flexible tile view to show the interaction between data. It visualizes data and supports filtering and querying a variety of data types. It displays data in various ways and highlights the keyword segments in the data.

In terms of data visualization, the dashboard guides you through dragging or double-clicking a field to display data explicitly. In terms of data analysis, the dashboard utilizes user-friendly notifications to improve user interaction.

Data visualization performance has improved significantly. On the editing page of the dashboard, you can filter dynamic data.

Chart types and scenarios

You need to use the corresponding charts to display different types of data. Quick BI currently supports 35 types of charts, including line charts, vertical bar charts, bubble maps, and funnel charts.

| Analysis type | Description | Scenarios | Applicable charts |
|---------------|---|--|--|
| Comparison | Compares the differences between values, or compares the measures based on the dimensions. | Compares the sales/income differences between different countries or regions. | Vertical bar chart, combination chart, horizontal bar chart, radar chart, funnel chart, cross table, pivot table, polar diagram, tornado-leaned funnel chart, and word cloud. |
| Proportion | Displays the percentage of a portion of the whole, or the proportion of a certain value compared to the whole. | Displays the sales of the salesperson who has the greatest percentage of total sales. | Pie chart, funnel chart, gauge, and treemap. |
| Relationship | Displays the relationship between values, or between measures. | You can view the relationship between two measures and learn the influence the first measure has on the second measure. | Scatter chart, treemap, kanban, hierarchy chart, flow analysis chart, and progress bar. |

The following table describes the analysis types and scenarios for each chart.

| Analysis type | Description | Scenarios | Applicable charts |
|----------------|---|---|--|
| Trend | Displays data trends (especially trends based on the date such as the year/month/day), or the progress of a data indicator and other possible patterns. | You can view trends in sales or revenue for a product over a period of time. | Line chart and area chart. |
| Geographic map | Displays the relevant data and distribution range for a country or region on the map. The datasets used must include geographic data. | You can view the income for each region in a country. | Bubble map, colored map, and LBS bubble map. |

The elements of a chart

Each chart has three tabs, which are Data, Style, and Advanced, as shown in the following figure.



- Settings in the Data tab determine the data shown on the chart.
- Settings in the Style tab determine the appearance of the chart and the details to be displayed.

• Settings in the Advanced tab determine whether the data and multiple charts can be linked, and dynamically display the interaction and comparison of the data as needed.

The charts provided by Quick BI present distinct perspectives and data elements for different visualization scenarios. Take the geographic chart as an example. A core data element is latitude. Otherwise, the map cannot display data.

The following table describes the elements of each chart.

| Chart Type | Elements | Chart Configuration |
|---------------------------------|------------------------------|---|
| Line chart | Category axis and value axis | The category axis must have at least one dimension. The value axis must have at least one measure. |
| Area chart | Category axis and value axis | The category axis must have at least one dimension. The value axis must have at least one measure. |
| Stacked area chart | Category axis and value axis | The category axis must have at least one dimension. The value axis must have at least one measure. |
| 100% stacked area chart | Category axis and value axis | The category axis must have at least one dimension. The value axis must have at least one measure. |
| Vertical bar chart | Category axis and value axis | The category axis must have at least one dimension. The value axis must have at least one measure. |
| Stacked vertical bar chart | Category axis and value axis | The category axis must have at least one dimension. The value axis must have at least one measure. |
| 100% stacked vertical bar chart | Category axis and value axis | The category axis must have at least one dimension. The value axis must have at least one measure. |
| Circular bar | Category axis and value axis | The category axis must have at least one dimension. The value axis must have at least one measure. |
| Combination chart | Category axis and value axis | The category axis must have at least one dimension. The value axis must have at least one measure. |

| Chart Type | Elements | Chart Configuration |
|--------------------------------------|--|---|
| Horizontal bar chart | Category axis and value axis | The category axis must have at least one dimension. The value axis must have at least one measure. |
| Stacked horizontal bar chart | Category axis and value axis | The category axis must have at least one dimension. The value axis must have at least one measure. |
| 100% stacked horizontal bar chart | Category axis and value axis | The category axis must have at least one dimension. The value axis must have at least one measure. |
| Pie chart | Labels and central angle | The label contains only one dimension, and the value of the dimension must be less than or equal to 12. The central angle has only one measure. |
| Bubble map | Location and the bubble size | The location contains only one dimension, which is the geographic dimension. The bubble size element can have 1-5 measures. |
| Colored map | Location and colorscale | The location contains only one dimension, which is the geographic dimension. The colorscale element can have 1-5 measures. |
| Geo bubble map | Location and the bubble size | The location contains only one dimension, which is the geographic dimension. The bubble size element can have 1-5 measures. |
| Geo map | Location and colorscale | The location has only one dimension, which is geographic data. The color saturation has only one measure. |
| LBS bubble map | Geographical area and LBS bubble size | The geographical area has only one dimension, which is the latitude. The LBS bubble size element can have at least one and at most five measures. |

| Chart Type | Elements | Chart Configuration |
|---------------------|---|--|
| LBS heat map | Location and LBS heat metric | The geographical area has only one dimension, which is the latitude. The LBS bubble size element can have at least one and at most five measures. |
| LBS flying line map | Geo location (from), Geo location (to), and routes (measures). | You can select a maximum of two dimensions for the geo locations. You can select a minimum of one and a maximum of five measures for the routes. |
| Cross table | Row and column | The row has unlimited dimensions. The column has unlimited measures. |
| Gauge | Indicator angle and tooltip | The indicator angle has only one measure. |
| Radar chart | Radius label and radius | You can select a minimum of one and a maximum of two dimensions for the labels. You can select a minimum of one measure for the lengths. |
| Scatter chart | Colors, X-axis, and Y-axis | You can select a minimum and maximum of one dimension for the color legend. The number of the dimension's values is up to 1,000. You can select a minimum of one and a maximum of three measures for the x-axis. You can select a minimum and maximum of one dimension for the y-axis. |
| Bubble chart | X-axis, Y-axis, and bubble size | The X-axis has only one dimension. The Y-axis has only one measure. The bubble size has only one measure. |
| Funnel chart | Tier labels and tier area | The tier labels element has only one dimension. The tier area element has only one measure. |
| Kanban | Labels and metrics | You can select a maximum of one dimension for the labels. You can select a minimum of one and a maximum of 10 measures for the metrics. |

| Chart Type | Elements | Chart Configuration |
|-----------------------------|---|---|
| Treemap | Rectangle label and rectangle size | The rectangle size element has only one dimension, with a value less than or equal to 12. The rectangle size element has only one measure. |
| Polar diagram | Slice label and arc radius | The slice label element has only one dimension, with a value greater than or equal to three and less than or equal to 12. The arc radius element has only one measure. |
| Word cloud | Word size and word | The word size element has only one dimension. The word element has only one measure. |
| Tornado-leaned funnel chart | Comparison and contrast indicator | The comparison element has only one dimension. The contrast indicator has at least one measure. |
| Hierarchy chart | Node label and node metric | The node label has at least two dimensions. The node metric has at least one dimension. |
| Flow analysis | Previous Page, Current Page, and Next Page. Previous Page PV, Previous Page UV, Current PV, Current UV, Next Page PV, Next Page UV, Conversion Rate, and Bounce Rate | Each data element has only one dimension and one measure. |
| Progress bar | Progress Indicator | The progress indicator has a minimum of one and a maximum of five measures. |
| Pivot chart | Row and value | The row has unlimited dimensions. The value has unlimited measures. |

2.2. Dashboard basic operations 2.2.1. Basic dashboard operations

This topic describes how to go to the Dashboards page and perform basic dashboard operations.

For more information about dashboards, see Dashboard overview.

To learn how to create charts, see Create a dashboard.

Go to the Dashboards page

Quick BI Quick BI Pro

- 1. Log on to the Quick BI console.
- 2. Click **Workspace > Dashboards** to go to the Dashboards page.
- 3. Click Create Dashboard > Standard to go to the dashboard editing page.

Quick BI Professional edition

- 1. Log on to the Quick BI console.
- 2. Click **Workspace > Dashboards** to go to the Dashboards page.
- 3. Hover your mouse cursor over **Create Dashboard** button and select a display mode. Click the display mode, as shown in the following figure.

| Dashboards | All Items | My Items | Q A total of 0 files | + Create Dashboard | + Create Folder |
|------------|-----------|------------|---|--------------------|-----------------|
| | | | | Standard | |
| | | | | Fullscreen | |
| | | | | | |
| | | No dat | a available , get started to fetch quic | dy ! | |
| | | Create Das | shboard Create Fullscreen D | ashboard | |

For more information about how to create standard dashboards, see Standard dashboards.

For more information about how to create full-screen dashboards, see Full-screen dashboards.

Areas of a dashboard

You can perform basic dashboard operations in the following three areas.

- Dataset selection area
- Dashboard configuration area
- Dashboard display area

Dataset selection area

In the dataset selection area, you can switch from an existing dataset to another dataset. Based on the preset data types, the fields of the new dataset are displayed in the dimension list and the measure list. You can select dimension and measure fields based on the data elements in the chart.

Dashboard configuration area

In the dashboard configuration area, you can select a chart type, and edit the title, layout, and legend pattern of the chart. In Advanced Settings, you can relate multiple charts and display analysis results from multiple perspectives. You can filter data using Filters. You can also insert a filter bar to search any key metric in a chart.

Dashboard display area

In the dashboard display area, you can drag and drop a chart to change its position as you like. You can also change the chart type based on your needs. For example, you can change a column chart to a geo bubble map. The system will display the missing or error elements based on the basic components of different charts. The dashboard provides a guide feature to help you learn how to create a dashboard.

2.2.2. Create a dashboard

This topic describes how to create a dashboard.

Quick BI Pro

- 1. Log on to the Quick BI console.
- 2. Click the **Workspace** tab. In the left-side navigation pane, click **Dashboards**.
- 3. On the Dashboards page, choose Create Dashboard > Standard.

Quick BI Enterprise Standard

- 1. Log on to the Quick BI console.
- 2. Click the **Workspace** tab. In the left-side navigation pane, click **Dashboards**.
- 3. On the Dashboards page, click Create Dashboard and select the display mode for the dashboard.
 - Standard: For more information, see Standard dashboards.
 - Full Screen: For more information, see Full-screen dashboards.



2.2.3. Standard mode

All Quick BI editions support the standard dashboard type. We recommend that you select the standard mode when you create a dashboard. This topic describes the operations that you can perform in standard mode.

In standard mode, you can perform the following operations in the dashboard display section:

- Change the position of a chart.
- View the data of a chart.
- Delete a chart.
- Change the type of a chart.
- Add a dashboard to favorites.

• Configure global variables.

♥ Notice

- In Quick BI Basic, you cannot configure global variables.
- In Quick BI Pro and Quick BI Enterprise Standard, you can configure global variables only in group workspaces.

If it is the first time that you use a Quick BI dashboard, a wizard appears in the display area to guide you through the dashboard features. You can follow the instructions in the wizard to create a dashboard.

More operations

You can click the **More** icon in the upper-right corner of a chart to perform the following operations:

- Move To: Move the chart to a tab container.
- View Data: View the data of the chart.
- Export to Excel: Export the data of the chart to an XLS or XLSX file.
- Export to Image: .Export the data of the chart in an image.
- View SQL Statements: View the SQL statements of the chart.
- Copy: Copy the chart.
- Full Screen: Display the chart in a full screen. In full-screen mode, you can click **Exit Full Screen** to exit.
- Delete: Delete the chart.



Change the type of a chart

You can change the type of a chart in the dashboard display section.

The following example describes how to change a pie chart to a radar chart.

- 1. Select the required pie chart in the dashboard display section.
- In the upper-right corner of the page, click Change Chart Type.
 Click the Radar Chart icon.

| Graphic Design | 🚷 Change chart type 🔸 |
|--|---|
| Radar TreeMap | |
| | 'd-1 |
| Word Cloud | |
| Conversion Path | |
| | |
| Radar | 1 at most two dimension and the |
| dimension of the dimens to 3, and less than or equ metric. | 1, at most two-dimension, and the ion value must be greater than or equal ial to 12; branch length the shao qu 1 to display analysis obtained a number |

3. The pie chart changes to a radar chart.



If the fields of the current chart do not match those of the target chart, the chart type cannot be changed. You must manually adjust fields before you change the chart type.

The system provides instructions for you to adjust fields based on the current and target chart types. Follow the instructions to add appropriate dimensions or measures to the correct fields.

Add a dashboard to favorites

Click the Micro at the top of the display area of the dashboard.

Configure page settings

Click the sicon. On the Page Settings tab, specify whether to show the watermark and whether the dashboard can be downloaded.

| Page Settings |
|---|
| Basic Settings ^ |
| Show Watermark Allow Download Hide Header on Mobile Phone |
| Theme Design |
| Official Template • • |
| Skin Liqht Dark Theme Color Business Classic |
| Cascading Conditions ^ |
| Cascade Configuration Items |

Configure global variables

After you create a dashboard and click **Save**, you can configure global variables. Global variables are used in the Hyperlink feature. For more information, see Drilling, filter interaction, and hyperlink.

| | | | ê 🙆 🗟 | |
|------------------|-------|--------------------------------------|-------|----|
| 0 e 🔻 🔄 🖬 🗄 | ₩ 9-4 | | | |
| Global Variables | | | | × |
| Global Variables | 0 | | | |
| Enter a name. | | | | |
| | | | | |
| | | | | |
| | | | • | |
| | | Enter a name for the required field. | | |
| | | | | |
| | | | | |
| | | | | |
| | | | Cance | ОК |

Make a dashboard public

1. Click the 🛃 icon. The Make Public pane appears.

| Make Pub | lic |
|-----------------|--|
| Security Leve | el: Public |
| Owne | n |
| Expiration Date | e: 🗐 |
| Generate UR | L: 🔽 |
| | make a work publicly available, any user can use this URL to access . Use caution when performing this operation. |

- 2. Specify Expiration Date.
- 3. Select Generate URL as required.
- 4. Click Make Public.

2.2.4. Full-screen mode

On the Workspace page, move your pointer over **Create Dashboard** and select **Full Screen**. In full-screen mode, you can perform the following operations in the display area of a dashboard.

| ≔ | oards | All Items My It | ems Al | Il Status 💛 Name | ✓ Q Total Files: 3 | + Create Dashboard | + 0 | ireate Fo | older |
|----------------|-------------|-----------------|------------|---------------------|--------------------|--------------------|-----|-----------|-------|
| <u>x</u> | • | | Publish St | itatus Created By 👙 | ; Modified By/At | Standard | | Acti | tions |
| BI Portals | V313 | | - | | | Full Screen | | E | Ē |
| Dashboards | 352 • | | | | | Standard | e e | L of | |
| 📚 Workbooks | 352 0 | | | | | Standard | 26 | | |
| Datasets | .1 Untitled | _area 👁 | 1000 | | | Standard | e e | ¢ | 1 |
| ↔ Data Sources | 11 Dashboa | ardTest O | | | and Statements | Standard | e e | c¢ | : |

- Adjust chart positions.
- Add a subscreen.
- View chart data.
- Delete a chart.
- Change chart types.
- Configure page settings.

Note The full-screen mode is available only in workspaces of Quick BI Enterprise Standard. Personal workspaces only support the standard mode.

Adjust chart positions

In full-screen mode, a chart will be scaled to its maximum extent in the display area of a dashboard. If multiple charts exist in a dashboard, click the arrow cross and hold down the left button, and drag charts to change the arrangement, as shown in the following figure.



Add a subscreen



1. Click the plus sign (+) in the lower-right corner, as shown in the following figure.

- 2. Add a chart to the subscreen.
- 3. Click the Switch Subscreen icon to switch between subscreens, as shown in the following figure.



4. Click the **Delete** icon to delete a subscreen, as shown in the following figure.



View chart data

- 1. Select a chart.
- 2. Click the More icon in the upper-right corner of the chart.
- 3. Select View Data, as shown in the following figure.



Delete a chart

- 1. Select a chart.
- 2. Click the More icon in the upper-right corner of the chart.

3. Select **Delete**, as shown in the following figure.



Change chart types

- 1. Select a chart.
- 2. In the Graphic Design area, click Change Chart Type.
- 3. Select the target chart type.

If the chart type fails to change, the fields of the current chart do not match those of the target chart. You must manually adjust fields before you change the chart type.

The system provides instructions to help you adjust fields based on the current and target chart types. To change the chart type, follow the instructions to adjust the dimensions and measures.

Configure page settings

Click of to configure page settings, such as page scale.

| 🗿 端 🗖 🛛 Edit | Preview Save Save and Publish |
|----------------------|-------------------------------------|
| | Page Settings |
| | Page Scale 💿 AutoFit 🔵 16:9 🔵 4:3 |
| | Skin 💿 Light 🔵 Dark |
| pany_sales mber | Theme OBusiness OClassic (Original) |
| | Update Data 🔵 |
| 509 ⁶⁰²⁰⁰ | 5 Minutes 15 Minutes 30 Minutes |
| | Carousel |
| 100 cm 22 00 cm | 3 Minutes 5 Minutes 10 Minutes |

2.2.5. Switch datasets

In the dataset selection area, you can select or switch datasets, and search for datasets by dimension and measure fields.

- 1. Click the Dataset Switch icon.
- 2. In the drop-down list, select or search for the datasets that need to be analyzed, such as company_sales_record.



If you cannot find the required dataset from the drop-down list, go back to the dataset management page and ensure that the dataset has been successfully created.

For more information about how to create datasets, see Create a dataset Create datasets.

2.2.6. Search for the dimensions field and the measures field

After you have selected the datasets, the system automatically separates fields into the dimension and measure areas.

You can enter a keyword in the search bar, and click the search icon. The system automatically searches for the fields that contain the keyword.

- 1. For example, enter a keyword called product in the search bar.
- 2. The fields that contain the keyword automatically appear in the list, as shown in the following figure.



2.2.7. Configure a chart

You can select a chart from the dashboard display section and configure it in the configuration section.

Before you configure a chart, make sure that you have selected a dataset and have edited dimensions and measures as required.

For more information, see Edit dimensions and measures.

1. Click a chart icon. The chart indicated by the icon appears in the dashboard display section.

If you want to switch to another chart type, click **Change Chart Type** in the upper-right corner of the **Graphic Design** pane and select the required chart.

- 2. On the Data tab, select the required measures and dimensions.
 - Move the pointer over a dimension field. The More, Drill Down, and Delete icons appear.



 More: You can click the More icon to sort the values of the dimension. Four options are supported: Unsort, Ascend, Descend, and Custom. Custom sorting is applicable only to non-DATE-type dimensions.

Onte If the number of dimension values exceeds 200, custom sorting is not supported.

- Drill Down: You can click the Drill Down icon to perform drilldown analysis. For more information, see Drilling, filter interaction, and hyperlink.
- Delete: You can click the Delete icon to delete the dimension.
- Move the pointer over a measure field. The More and Delete icons appear.



• More: You can click the More icon to perform the following operations on the measure.



Note The Cumulative function in Advanced Calculation is available only when the dimension is of the DATE type and at the day granularity. If the Advanced Calculation function is enabled for a measure, the Comparison function is unavailable. If the Comparison function is enabled for a measure, the Advanced Calculation function is unavailable.

Note the following items when you enable the Comparison function:

If dimensions include only one DATE field, configure the comparison granularity for measures to the granularity of this field.



- If dimensions include multiple DATE fields, configure the comparison granularity to the smallest granularity of these fields by choosing Comparison > Custom. When Data
 Settings is set to Percentage Difference, you can select a calculation formula in Advanced Settings. The selected formula takes effect only when the value of the previous period is less than 0. The following values are provided:
 - Value 1 and the default value: (Value of Current Period/Value of Previous Period 1) × 100%
 - Value 2: (1 Value of Current Period/Value of Previous Period) × 100%
 - Value 3 that indicates no calculation: Display As -
- If dimensions do not include DATE fields, select a DATE field from an associated query control. Then, choose More > Comparison > Custom next to a measure, and set the comparison granularity to the granularity of the selected date field.

Note If the associated query control has more than one DATE field and the comparison function is enabled for more than one measure, the comparison function takes effect only for the first measure.

If no date field is included in the dimension fields, choose Comparison > Custom, retain the preceding configurations, and set Comparison Type to Dynamic Comparison.

| Comparison Setting | gs (]) | × |
|--------------------|------------------------------|----|
| Comparison Date | report_date(day) | ~ |
| Comparison Type | Compare (Day to Day) | |
| | Compare (of Last Week) | |
| | Ocompare (of Last Year) | |
| Data Settings | Specific Value Difference | |
| | • Percentage Difference | |
| | Advanced Settings \gtrless | |
| | Cancel | OK |

When **Data Settings** is set to **Percentage Difference**, you can select a calculation formula in Advanced Settings. The selected formula takes effect only when the value of the previous period is less than 0. The following values are provided:

- Value 1 and the default value: (Value of Current Period/Value of Previous Period 1) × 100%
- Value 2: (1 Value of Current Period/Value of Previous Period) × 100%
- Value 3 that indicates no calculation: Display As -

When **Comparison Type** is set to **Dynamic Comparison**, the comparison value is dynamically calculated based on the specified date range. Examples:

- If the specified date is January 10, 2020, the date used for comparison is January 9, 2020.
- If the specified date range is January 1, 2020 to January 10, 2020, the date range used for comparison is from December 22, 2019 to December 31, 2019.

You can click View SQL Statements to view the settings of dynamic comparison.

If the associated query control has more than one DATE field and the comparison function is enabled for more than one measure, the comparison function takes effect only for the first measure.

? Note If the comparison result cannot be obtained, a hyphen (-) is displayed.

- Sort: Supported options include Unsort, Ascend, and Descend.
- Delete: You can click the Delete icon to delete the measure.
- 3. Select a dimension and drag it to the Color Legend (Dim.) field.

The selected dimension appears in the specified color in a chart. If you cannot drag a dimension or measure, an error occurs. You can follow the on-screen tips to add or remove dimensions and measures.

Take **product_type** as an example.

i. Drag product_type to the Color Legend (Dim.) area, and then click Update.



- ii. Click the Style tab and configure colors in the Series Settings section.
- 4. Click the **Style** tab, configure parameters in the Basic Information, Chart Type, Axes, Functionality, and Series Settings sections.
- 5. On the **Advanced** tab, click **Auto Refresh**. You can select the time interval for automatic data refresh. You can also associate the current chart with other charts for interaction analysis. Before you enable interaction analysis, make sure that at least two charts are available in the display area of the dashboard.

2.2.8. Filter field data

When you work with a large dataset, you can use the filter feature to filter specific types of data from the dataset.

You can filter data of the STRING, NUMERIC, or DATE type.

Filter data of the STRING type

This example demonstrates how to filter municipalities from values of the province field.

- 1. Drag **province** to the **Filters** field.
- 2. Click the Filter icon. In the Set Filter dialog box, configure a filter condition.
- 3. Click the Filter by Condition tab or the Filter by Value tab as required. In this example, click the Filter by Value tab.

| Set Filter | × |
|--------------------------------|-------------------------------|
| <pre>@company_sales_reco</pre> | str. province |
| Filter by Condition | Filter by Value |
| Single Select Multiple | Select |
| | • |
| Search by name. | Added Items: 0 🖉 Specify |
| Anhui | |
| Beijing | |
| Fujian 🕂 | |
| Gansu | |
| Guangdong | Add required items from the K |
| Guangxi | len-side list. |
| Guizhou | |
| Hainan | |
| Select All | |
| Add by Select Sequence | ок |

4. Select Multiple Select, enter city names or select city names from the drop-down list, as shown in the following figure.

| Search by name. | Added Items: 2 | 🙎 Specify |
|-----------------------------|----------------|-----------|
| Anhui | Beijing | |
| Beijing | Fujian | |
| 💙 Fujian | | |
| Gansu | | |
| Guangdong | | |
| Guangxi | | |
| Guizhou | | |
| Hainan | | |
| Select All | Added Items: 2 | 団 |
| Add by Select Sequence | | ОК |

- 5. Click OK.
- 6. Click Update. The chart is updated based on the filter settings.

Filter data of the NUMERIC type

You can specify a value range in the filter. For example, you can specify an order quantity range of 50,000 to 100,000. The chart displays data based on your specified range.

The following example demonstrates how to filter data within a specified profit range.

- 1. Drag profit_amt to the Filters field.
- 2. Click the Filter icon.

3. In the Set Filter dialog box, configure a filter condition. For example, you can select Greater Than, Less Than, or Equal To and set the condition, as shown in the following figure.

| Set F | ilter | | | \times |
|-------|----------|----------|----------------|----------|
| Cor | npany_sa | es_reco | № 🕮 profit_amt | |
| or | and | | | |
| > | \sim | 50000 | or | |
| < | \sim | 60000 | | |
| + | | tion 2/2 | | |
| | | | Cancel | ок |

- 4. Click OK.
- 5. Click Update. The chart is updated based on the filter settings.

Filter data of the DATE type

You can use the filter feature to filter data that is generated within a specified time range. The following example demonstrates how to filter the order amount data of all regions from year 2013 to year 2015.

Onte The filter condition that you specified can be accurate to second.

The order_date (year) is used in this example.

- 1. Drag order_date (year) to the Filters field. Click the Filter icon.
- 2. In the Set Filter dialog box, click the Filter by Duration tab, select **Absolute Time** for Start At and End At, and then select 2013 and 2015 in the drop-down lists.



- 3. Click OK.
- 4. Click Update. The chart is updated based on the filter settings.

2.2.9. Configure the comparison feature

This topic describes how to configure the comparison feature for a measure.

Prerequisites

- A dashboard is created. For more information, see Create a dashboard.
- A dataset is selected and the types of dimensions and measures are edited as required. For more information, see Edit dimensions and measures.
- A query control is added. For more information, see Create a query control.

Context

- If Advanced Calculation is configured for a measure, Comparison is unavailable.
- If Comparison is configured for a measure, Advanced Calculation is unavailable.

One DATE field in dimensions

If dimensions contain only one DATE field, set the granularity for the comparison feature to the granularity of this field.

The following example demonstrates how to configure the comparison feature for a measure. A cross table is used in this example.

1. On the dashboard edit page, add a cross table and configure it, as shown in the following figure. In this example, the DATE field order_date(month) is added to the Rows field.

| Order profit details | | Rows | company_sales_record |
|----------------------|--------------|----------------------------|-----------------------|
| report_date(month) | order_number | Rows | |
| - | 48168 | report_date(month) | |
| 201301 | 5699 | | 3 ensions |
| 201302 | 4121 | Columns | Str. order_id |
| 201303 | 4258 | we order_number(SUM) | 👻 report_date |
| 201304 | 4649 | | iii report_date(year) |
| 201305 | 4692 | Filters | 🛗 report_date(mont |
| 201306 | 4338 | | report_date(week |
| 201307 | 5142 | Drag and drop fields here. | Measures 💻 |
| 201308 | 4880 | | 👻 🗁 Default |
| | | Aggregates Items | Nº order_number |

- 2. Move the pointer over the required measure in the Columns field and click the icon next to the measure.
- 3. Choose **Comparison > Compare (Month to Month)**. The following table describes the mapping between DATE field types and options under Comparison.

| DATE field type | Sample field | Option under Comparison |
|-----------------|------------------|--|
| Year | order_date(year) | Compare (Year to Year) Custom None |

| DATE field type | Sample field | Option under Comparison |
|-------------------------|---|---|
| Quarter | order_date(quarter) | Compare (Quarter to Quarter) Compare (of Last Year) Custom None |
| Month | order_date(month) | Compare (Month to Month) Compare (of Last Year) Custom None |
| Day | order_date(day) | Compare (Day to Day) Compare (of Last Week) Compare (of Last Month) Compare (of Last Year) Custom None |
| Hour, minute, or second | order_date(hour), order_date(minute), or order_date(second) | The comparison feature is not supported. |
| YYYY/MM/DD HH:mm:ss | order_date(ymdhms) | CustomNone |

4. Add a query control and configure it, as shown in the following figure.

| Tips: No query conditions. | Set Query Conditions | | | | | View Operation | ons Guide» 🛛 🗙 |
|----------------------------|-------------------------|-----------|-----------------------------------|-----------------------|---------------|---|----------------|
| | Query Condition | + | Associated ChartsQ Total 1 Charts | Smart Field () | Query Condit | ion Configuration | Require |
| | query date 2 © | . : | Select All | Clear Selected Fields | Basic Config | uration | ~ |
| | | | Grder profit det company_sal | 📋 report_date(mon 🗸 | Display Mod | Select Date | |
| | | | | | Time Granul | Year-Month | |
| | | | | | Specify | a time range | |
| | | | | | 🖒 Specif | a time range Unconfigured | |
| | | | | | Filter Method | SingleMonth MonthInterval | |
| | | | | | Interval Type | ○ Start At ○ End At | rval |
| | | | | | | Shortcut Range | |
| | | | | | Set Defa | ult Filter Value | |
| | | | | | | | |
| | | | | | | | |
| | | | | | | | |
| | Conditional Cascade Con | figuratio | n | | | Cancel | ок 4 |

5. In the query control, specify a time range and click Query.

| uery date | | Data |
|----------------------|---------------------------------------|--------------------------|
| | - 2015-08 🛱 | Query Rows |
| | | i report_date(month) |
| Order profit details | | : • 1 |
| report_date(month) | order_number_Compare (Month to Month) |) Columns |
| 201305 | 0.92 | 92% order_number(SUM-Com |
| 201306 | -7.54 | |
| 201307 | 18.53 | Filters |
| 201308 | -5.10 | |
| 201309 | -1.54 | 54% |
| 201310 | -11.76 | 76% |
| 201311 | -2.48 | 18% |
| 201312 | 7.38 | 38% |
| 201401 | -3.09 | 09% |

Multiple DATE fields in dimensions

If dimensions contain multiple DATE fields, the field with the smallest granularity is used to configure the comparison feature.

The following example demonstrates how to configure the comparison feature for a measure. A cross table is used in this example.

1. On the dashboard edit page, add a cross table and configure it, as shown in the following figure. In this example, DATE fields order_date(day) and order_date(month) are added to the Rows column.

| Ordor profit dotailo | | | Data | Style Advance |
|--|------------------|--------------|----------------------------|----------------------|
| Order profit details report_date(month) | report_date(day) | order number | Rows | company_sales_record |
| 201301 | 20130106 | 303 | report_date(month) | Q Search by keyword. |
| 201301 | 20130107 | 142 | report_date(day) | Dimensions |
| 201301 | 20130108 | 67 | ł | 3 str. order_id |
| 201301 | 20130109 | 218 | Columns | report_date |
| 201301 | 20130110 | 364 | | report_date(yea |
| 201301 | 20130111 | 179 | Nº order_number(SUM) | report_date(mon |
| 201301 | 20130112 | 239 | | iii report_date(wee |
| 201301 | 20130113 | 83 | Filters | Measures = |
| 201301 | 20130114 | 238 | Drag and drop fields here. | - 🗁 Default |
| 201301 | 20130115 | 177 | Aggregates Items | Nº order_number |
| 201301 | 20130116 | 278 | | № order_amt |
| 201301 | 20130117 | 281 | Records Displayed 1000 | Nº back_point |

- 2. Move the pointer over the required measure in the Columns field and click the icon next to the measure.
- 3. Choose **Comparison > Custom**.
- 4. In the **Comparison Settings** dialog box, configure the parameters listed in the following table.

| Parameter | Valid value | Description |
|-----------------|--|---|
| Comparison Date | order_date(day) | If dimensions contain multiple DATE fields, the field with the smallest granularity is used and cannot be modified. In this example, the value is order_date(day) |
| Comparison Type | Compare (Day to Day) Compare (of Last Week) Compare (of Last Month) Compare (of Last Year) | The valid values of Comparison Type vary based on the setting of Comparison Date. In this example, set the value to Compare (Day to Day). |
| Data Settings | Specific Value Difference Percentage Difference | If you set the value to Percentage Difference , you must click Advanced Settings and select a formula. |
| Formula | (Value of Current Period/Value of Previous Period - 1) × 100% (default value) 1 - (Value of Current Period/Value of Previous Period) × 100% Displayed As - | The formula takes effect only if Data Settings is set to Percentage Difference and the value of the previous period is less than 0. |

- 5. Click OK.
- 6. Add a query control and configure it, as shown in the following figure.

| 🗐 🚺 🖻 🗎 🖂 🦗 🖶 🗯 🔍 🖷 | 🤞 🖷 🙆 🤹 | Ţ. |) 🖬 🛲 🧹 🖂 📾 🕀 | | | |
|--------------------------------|----------------------|------------|-----------------------------------|------------------------|---|----------|
| Tips: No query conditions. + 2 | Set Query Conditions | | | | View Operations O | Buide> × |
| | Query Condition | + | Associated ChartsQ Total 1 Charts | Smart Field ① | Query Condition Configuration | Required |
| | Query Date | ⊚ ! | Select All | Clear Selected Fields | Basic Configuration | \vee |
| | | | Cross Table-co company_sal | 💼 report_date(day) 🗸 4 | Display Mod Select Date | |
| | | | | | Time Granul Year-Month-Date | |
| | | | | | Specify a time range | |
| | | | | | Specify a time range Unconfigured | |
| | | | | | Filter Method SingleSun SunInterval | |
| | | | | | Interval Type O Start At O End At Time Interval Shortcut Range | |
| | | | | | Set Default Filter Value | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | Conditional Cascade | Configural | tion | | Cancel | ок 5 |

7. In the query control, specify a time range and click **Query**.

| 2013-01-01 | - 2013-02-01 | Query | Rows |
|----------------------|------------------|-----------------------------------|---------------------------|
| | | | report_date(month) |
| Order profit details | | | 🚞 report_date(day) |
| report_date(month) | report_date(day) | order_number_Compare (Day to Day) | ti |
| 201301 | 20130101 | - | Columns |
| 201301 | 20130102 | 14.63% | NO order number/CLINA Com |
| 201301 | 20130103 | 23.40% | ve order_number(SUM-Comp |
| 201301 | 20130104 | -64.37% | |
| 201301 | 20130105 | 574.19% | Filters |
| 201301 | 20130106 | -27.51% | |
| 201301 | 20130107 | -53.14% | |
| 201301 | 20130108 | -52.82% | |

No DATE field in dimensions (year-to-year comparison)

If dimensions do not contain DATE fields and you want to configure the comparison feature for the chart, select a DATE field in a query control that is associated with the chart. Then, set Comparison Date to a field with the same granularity as this DATE field in the **Comparison Settings** dialog box.

The following example demonstrates how to configure year-to-year comparison for a measure. A cross table is used in this example.

1. On the dashboard edit page, add a cross table and configure it, as shown in the following figure.

| | | | Data | Style Advanced |
|----------------------|--------------|--------|---------------------------------|-----------------------------------|
| Order profit details | | | | |
| product_box | order_number | | Rows | company_sales_record |
| 中型箱子 | | 11993 | Str. product_box | |
| 大型箱子 | | 15577 | | 3 ensions |
| 小型包裹 | | 32130 | Columns | product_spo |
| 小型箱子 | | 145828 | | Str. product_sub_type |
| 巨型木箱 | | 23199 | <pre>NO order_number(SUM)</pre> | Str. product_name |
| 巨型纸箱 | | 18257 | | Str. product_box |
| 打包纸袋 | | 44812 | Filters | shipping_date |
| | | | Drag and drop fields he | ere. Measures - |
| | | | | - 🗁 Default |
| | | - | Aggregates Iten | ns № order_number |
| | | | | Nº order_amt |
| | | | Records Displayed 1000 | № back_point |

- 2. Move the pointer over the required measure in the Columns field and click the icon next to the measure.
- 3. Choose **Comparison > Custom**.
- 4. In the **Comparison Settings** dialog box, configure the parameters listed in the following table.

| Parameter | Valid value | Description |
|-----------------|------------------|--|
| Comparison Date | order_date(year) | Configure this parameter as required. In this example, set the value to order_date(year). |
| Parameter | Valid value | Description | | |
|-----------------|--|--|--|--|
| Comparison Type | Compare (Day to Day) Compare (of Last Week) Compare (of Last Month) Compare (of Last Year) Dynamic Comparison | The valid values of Comparison Type vary based on the setting of Comparison Date . In this example, set the value to Compare (Year to Year) . | | |
| Data Settings | Specific Value Difference Percentage Difference | If you set the value to Percentage Difference , you must click Advanced Settings and select a formula. In this example, set the value to Percentage Difference . | | |
| Formula | (Value of Current Period/Value of Previous Period - 1) × 100% (default value) 1 - (Value of Current Period/Value of Previous Period) × 100% Displayed As - | The formula takes effect only if Data Settings is set to Percentage Difference and the value of the previous period is less than 0. | | |

- 5. Click OK.
- 6. Add a query control and configure it, as shown in the following figure.

| 🔤 🚺 🖻 🗎 🖸 🚜 🖶 🛣 🌑 🖷 | | | | | |
|--------------------------------|---------------------------------|-----------------------------------|-------------------------|---|----------------|
| O Tips: No query conditions. + | Set Query Conditions | | | View Operations G | Suide> $	imes$ |
| | Query Condition + | Associated ChartsQ Total 1 Charts | Smart Field (1) | Query Condition Configuration | Required |
| | 🗒 Query Date 💿 🗄 | Select All | Clear Selected Fields | Basic Configuration | ~ |
| | | Cross Table-co company_sal | 🖻 report_date(year) 🗸 4 | Display Mod Select Date | |
| | | | | Time Granul Year | |
| | | | | Specify a time range | |
| | | | | Specify a time range Unconfigured | |
| | | | | Filter Method O SingleYear YearInterval | |
| | | | | Interval Type O Start At O End At O Time Interval | |
| | | | | Set Default Filter Value | |
| | | | | | |
| | | | | | |
| | | | | | |
| | Conditional Cascade Configurati | on | | Cancel | ок 5 |

7. In the query control, specify a time range and click Query.

| Query Date | | | Data |
|-----------------|-------------------------------------|--------|-------------------------|
| 2013 🛱 - 2015 🛱 | | Query | Data Source Type: |
| Cross Table | | | Rows |
| product_box | order_number_Compare (Year to Year) | | Str. product_box |
| Huge Box | | 47.20% | |
| Huge Paperbag | | 44.91% | Columns |
| Large Box | | 48.81% | Nº order_number(SUM-Com |
| Medium Box | | 46.99% | |
| Paperbag | | 50.55% | Filters |
| Small Box | | 41.81% | Fillers |
| Small bag | | 49.53% | |

If the query conditions in a query control contain multiple DATE fields and the comparison feature is configured for multiple measures, the comparison feature takes effect only for the first measure.

| 2013 🗂 - | 2015 | Q | Data Source Type: |
|---------------|-------------------------------------|-------------------------------------|------------------------|
| ross Table | | | Rows |
| product_box | order_number_Compare (Year to Year) | profit_amt_Compare (Month to Month) | Str. product_box |
| Huge Box | 47.20% | | - 11 |
| Huge Paperbag | 44.91% | | - Columns |
| Large Box | 48.81% | | - order_number(SUM-Com |
| Medium Box | 46.99% | | - |
| Paperbag | 50.55% | | Profit_amt(SUM-Compare |
| Small Box | 41.81% | | |
| Small bag | 49.53% | | - Filters |

? Note If the comparison result cannot be calculated, a hyphen (-) is displayed.

No DATE field in dimensions (dynamic comparison)

If dimensions do not contain DATE fields, you must select a DATE field in the **Comparison Settings** dialog box to configure the comparison feature, which is similar to <u>Multiple DATE fields in dimensions</u>.

You can also select **Dynamic Comparison**. The following example demonstrates how to configure dynamic comparison. A cross table is used in this example.

1. On the dashboard edit page, add a cross table and configure it, as shown in the following figure.

| 1 | | Data | Style Advanced |
|---------------|--------------------|------------------------|----------------------|
| Cross Table | | | |
| product_box | profit_amt | Data Source Type: | Sealaset 👘 |
| Huge Box | 43016.41999999999 | Rows | company_sales_record |
| Huge Paperbag | 360.89999999997553 | rtuws | |
| Large Box | 49832.8799999998 | Str. product_box | Q Search by keyword. |
| Medium Box | 7502.9899999999 | t | 3 ensions |
| Paperbag | 25393.86999999966 | Columns | area_Hierarchy |
| Small Box | 180186.1899999997 | Nº profit_amt(SUM) | 🗝 🦁 👳 |
| Small bag | 12559.02999999997 | pron_ann(comy | 📄 💿 province |
| | | | |
| | | Filters | Measures = |
| | | Aggregates Items | - 🗁 Default |
| | | | Nº order_number |
| | | Records Displayed 1000 | Nº order_amt |

- 2. Move the pointer over the required measure in the Columns field and click the icon next to the measure.
- 3. Choose **Comparison > Custom**.
- 4. In the **Comparison Settings** dialog box, configure the parameters listed in the following table.

| Parameter | Valid value | Description |
|-----------------|--|--|
| Comparison Date | order_date(day) | Configure the parameter as required. In this example, set the value to order_date(day) . |
| Comparison Type | Compare (Day to Day) Compare (of Last Week) Compare (of Last Month) Compare (of Last Year) Dynamic Comparison | The valid values of Comparison Type vary based on the setting of Comparison Date . In this example, set the value to Dynamic Comparison. |
| Data Settings | Specific Value Difference Percentage Difference | If you set the value to Percentage Difference , you must click Advanced Settings and select a formula. In this example, set the value to Percentage Difference . |
| Formula | (Value of Current Period/Value of Previous Period - 1) × 100% (default value) 1 - (Value of Current Period/Value of Previous Period) × 100% Displayed As - | The formula takes effect only if Data Settings is set to Percentage Difference and the value of the previous period is less than 0. |

- 5. Click OK.
- 6. Add a query control and configure it, as shown in the following figure.

| 🗐 🚺 🖉 🔚 🖪 🚜 🌵 🐔 💌 👼 | * • • • • • | | | | |
|--------------------------------|---------------------------------|-----------------------------------|------------------------|--|----------|
| Tips: No query conditions. + 2 | Set Query Conditions | | | View Operations Gu | uide> × |
| | Query Condition + | Associated ChartsQ Total 2 Charts | Smart Field () | Query Condition Configuration | Required |
| | II Qurey Date | 3 Select All | Clear Selected Fields | Basic Configuration | ~ |
| | | 🗹 🔝 Cross Table 🛛 mysql | 🖹 report_date(day) 🗸 4 | Display Mod Select Date | |
| | | Cross Table company_sal | | Time Granul Year-Month-Date | |
| | | | | Specify a time range | |
| | | | | Filter Method SingleSun SunInterval | |
| | | | | Interval Type O Start At O End At Time Interval | |
| | | | | Shortcut Range | |
| | | | | Set Default Filter Value | |
| | | | | | |
| | | | | | |
| | Conditional Cascade Configurati | on | | Cancel | ок 5 |

7. In the query control, specify a time range and click **Query**.

| urey Date | | | Data |
|-----------------------------|-----------------------------|----------|---------------------------|
| 2010-06-01 🛱 - 2010-06-03 🛱 | | Query | Data Source Type: |
| Cross Table | | | Rows |
| product_box | profit_amt_compare(dynamic) | | Str. product_box |
| Huge Box | | -96.73% | ti |
| Huge Paperbag | | -98.09% | Columns |
| Large Box | | 465.28% | Nº profit_amt(SUM-Dynami |
| Medium Box | | - | |
| Paperbag | | 964.79% | Filters |
| Small Box | | -100.67% | |
| | | | Drag and drop fields here |

- 8. View SQL statements. If **Comparison Type** is set to **Dynamic Comparison**, the comparison results are dynamically calculated based on the specified time range. For example:
 - If the specified date is January 10, 2020, the date for comparison is January 9, 2020.
 - If the specified time range is January 1, 2020 to January 10, 2020, the time range for comparison is December 22, 2019 to December 31, 2019.
 - i. Click the icon in the upper-right corner of the cross table.
 - ii. Select View SQL Statements.You can view the time ranges for comparison.

| SQL | × |
|--|---|
| SELECT | _ |
| | D |
| COMPANY_T_1"product_box" AS A_PRODUCT_2_, | |
| SUM(COMPANY_T_1"profit_amt") AS A_PROFIT_3_ FROM | |
| "public"."company_sales_record" AS_COMPANY_T_1_ | |
| WHERE | |
| COMPANY_T_1"report_date" >= TO_TIMESTAMP('2010-06-01 00:00', 'yyyy-MM-dd hh24:mi:ss') | |
| AND COMPANY_T 1"report_date" <= TO_TIMESTAMP('2010-06-03 23:59:59', 'yyyy-MM-dd hh24:mi:ss') | |
| GROUP BY | |
| COMPANY T_1"product_box" | |
| LIMIT | |
| 20000 OFFSET 0 | |
| SELECT | |
| COMPANY_T_1"product_box" AS A_PRODUCT_2_, | |
| SUM(COMPANY_T_1"profit_amt") AS A_PROFIT_3_ | |
| FROM | |
| "public"."company_sales_record" AS COMPANY_T_1_ | |
| WHERE | |
| COMPANY_T_1"report_date" >= TO_TIMESTAMP('2010-05-29 00:00:00', 'yyyy-MM-dd hh24:mi:ss') | |
| AND COMPANY_T_1"report_date" <= T0_TIMESTAMP('2010-05-31 23:59:59', 'yyyy-MM-dd hh24:mi:ss') | |
| GROUP BY | |
| COMPANY_T_1"product_box" | |
| LIMIT | |
| 20000 OFFSET 0 | |

2.2.10. Sort data

In the **Data** tab, you can sort the data based on the selected measures and dimensions. The chart displays the data trend based on the sorted result.

Procedure

1. Select order_number, click the triangle icon next to the field, as shown in the following figure.

The upward triangle indicates ascending order, and the downward triangle indicates descending order.



2. Click Update.

2.2.11. Theme design

You can use the theme design feature to change the template, skin, and theme color for a dashboard.

Prerequisites

You have logged on to the Quick BI console and opened the dashboard edit page. For more information, see Create a dashboard.

Procedure

- 1. Click the on in the top navigation bar.
- 2. In the Basic Settings section of the Page Settings page, configure Official Template, Skin, and Theme Color under Theme Design.

| Parameter | Description | | | |
|-------------------|--|--|--|--|
| | The official template is selected by default. You can change it to a custom template. | | | |
| Official Template | Note After you change the theme, the custom settings of the original theme cannot be restored. We recommend that you save a copy of a theme before you change it. | | | |
| Skin | The options are provided: Light and Dark. If you select Light, the background color of the dashboard is white. The default value is Light. If you select Dark, the background color of the dashboard is black. | | | |
| | The options are provided: Business and Classic. | | | |
| Theme Color | Note After you change the theme color, the custom settings of the original theme cannot be restored. We recommend that you save a copy of a theme before you change it. | | | |
| | | | | |

2.3. Create charts 2.3.1. Create a dashboard

This topic describes how to create a chart.

See Dashboard overview and Dashboard basic operations before reading this topic. You must create and edit a dataset before creating a chart. For example, you must switch the dimension field type to Location.

For more information about how to create and edit a dataset, see Create a dataset.

For more information about how to switch the dimension type, see Change the dimension type.

Line charts

Line charts display the trends of data at equal intervals or over time.

Area charts

Similar to a line chart, an area chart displays the data trend and proportions.

Stacked area charts

A stacked area chart is an extension of an area chart. The values of each measure are displayed on top of each other. A stacked area chart displays the data trend and proportions.

100% stacked area charts

A 100% stacked area chart is a stacked area chart that shows percentages rather than absolute numbers.

Vertical bar charts

Vertical bar charts display the differences between data of different categories and the trends of data.

Stacked vertical bar charts

Each bar in a stacked vertical bar chart represents a whole, and segments in the bar represent different parts or categories of that whole.

100% stacked vertical bar charts

Each segment in a bar shows percentages rather than absolute numbers. Each bar in the chart represents a whole, and segments in the bar represent different parts or categories of that whole.

Circular bars

A circular bar chart displays the differences between data of different categories and the trends of data.

Combination charts

A combination chart can display data of different magnitudes by using dual Y-axis.

Horizontal bar charts

> Document Version: 20210117

Similar to a vertical bar chart, a horizontal bar chart displays the differences between data of different categories.

Stacked horizontal bar charts

Splits each entry to display the data size of each entry of the same type. Each bar in a chart represents a whole, and segments in the bar represent different parts or categories of that whole.

100% stacked horizontal bar charts

Each segment in a bar shows percentages rather than absolute numbers. Each bar in a chart represents a whole, and segments in the bar represent different parts or categories of that whole.

Pie charts

Pie chart display the size and proportion of each data category.

Bubble maps

Bubble maps display the size and distribution scope of metrics by region or country.

Colored maps

Colored maps show the size and distribution of data by using shades of color.

LBS bubble maps

LBS bubble maps use bubbles on a map to reflect the data size.

LBS heat maps

LBS heat maps use different colors to show the data values and ranges.

LBS flying line maps

LBS flying line maps use dynamic flying lines on a map to reflect the data size between two or more locations. It also shows data indicators and the distribution of data for a country or region.

Cross tables

Cross tables show the aggregated value of a field in the table, including the sum, average, count, maximum, and minimum.

Gauges

Gauge show the range of a specific indicator.

Radar charts

Radar charts show analyzed numbers or ratios.

Scatter charts

Scatter chart show the correlation and distribution of data.

Bubble charts

A bubble chart displays the data distribution and aggregation information by placing proportionally sized bubbles in corresponding locations.

Funnel charts

Funnel chart show values across multiple stages in a process.

Kanbans

Kanbans show the data changes in each stage.

Treemaps

Treemap display hierarchical data as a set of nested rectangles.

Polar diagrams

Polar diagrams compare multiple data values.

Word clouds

Word cloud can be used in user profiles and user labels.

Tornado-leaned funnel charts

Butterfly chart compare two objects under different indicators or analyzes a process that has complicated steps.

Hierarchy charts

Hierarchy charts analyze an organizational structure.

Flow analysis charts

Flow analysis chart illustrate the conversion rate of a webpage by comparing page views (PVs) and the number of unique visitors (UVs).

Progress bars

Similar to a gauge, a progress bar shows the progress of completing a task.

Pivot tables

Similar to a cross table, a pivot table shows the aggregated value of a field in the table, including the sum, average, count, maximum, and minimum.

2.3.2. Line charts

This topic introduces line charts, including an overview and an application example. It also describes how to configure the style of a line chart and how to delete a line chart.

Prerequisites

- A dashboard is created. For more information, see Dashboard overview and Create a dashboard.
- A dataset is created and edited based on your business requirements. For more information, see Create a dataset.

Overview

Line charts present data trends by using broken lines. The charts can show data that continuously changes over time. Line charts are best suited to show data trends at regular intervals. Line charts can also be used to analyze the interactions among multiple groups of data that change over time. For example, you can use a line chart to analyze the sales volume of a specific product and related products and forecast future sales.

A line chart consists of a category axis and a value axis. The category axis is the horizontal axis. You can specify only dimensions, such as date, province, and product type, for the category axis. The value axis is the vertical axis. You can specify only measures, such as a performance indicator or order quantity for the value axis.

Quick BI has configured the mapping between dimensions and the category axis, as well as measures and the value axis in dashboards. You only need to select fields from the Dimensions and Measures lists. The fields are automatically added to the Value Axis (Mea.) and Category Axis (Dim.) fields.

Notice You must specify at least one dimension for the category axis and at least one measure for the value axis. You can specify only one dimension for the color legend if required. The color legend is applicable only when the value axis has one measure.

Application example

The following example describes how to use a line chart to display order quantities and unit prices of multiple products. The *company_sales_record* dataset is used in the example.

- 1. Log on to the Quick BI console.
- 2. Click the **Workspace** tab. In the left-side navigation pane, click **Datasets**.
- 3. On the **Datasets** page, find the *company_sales_record* dataset and click the in icon in the Actions column.

Onte If you are using Quick BI Enterprise Standard, select Standard or Full Screen as the dashboard type. In this example, Standard is selected.

4. Click the 📈 icon. A line chart appears in the display section of the dashboard.

| ब् न 🖉 | i C | 🖂 | ¢ ŵ | * | • | | * | Ę | Ô | ê, | - |
|--------------------|------|-------|-------------|----------------|---------|---------------|----------|---|-----|----|---|
| Line Chart | | | | | | | | | | | : |
| | | | | - Order | quant | ity | | | | | |
| 500 | | | | | | | | | 0 | | |
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| D 300 | | No do | ta found i | a the au | rant al | ort | | | | | |
| 9D 25 | 0 | NU Ud | ta loullu l | n ne cui | rent ci | Idil. | | | | | |
| | 0118 | 0124 | 0130 Tra | 020 ansport | | 0211 (day) | 0217 | | 217 | | |
| | | | | | | | | | | | |
| | | | | | | | | | | | |

- 5. Select required dimensions and measures.
 - In the **Dimensions** list, find product_type and add it to the **Category Axis (Dim.)** field.
 - In the Measures list, find order_number and price, and add them to the Value Axis (Mea.) field.



6. Click **Update**. The chart is updated.



 On the Style tab, configure the parameters in the Basic Information, Chart Type, Axes, Functionality, and Series Settings sections. For more information, see Configure the parameters on the Style tab.

| Data | Style | Advanced |
|-----------------------------|-------|----------|
| Basic Information ${	imes}$ | | |
| Chart Type 🗸 | | |
| Axes 🗸 | | |
| Functionality ~ | | |
| Series Settings 🗸 | | |

8. On the **Advanced** tab, configure the parameters in the Advanced Settings and Metric Analysis sections.

| Data | Style | Adv | vanced |
|---|------------|-----|--------|
| Advanced Settings | | | |
| Auto Refresh | | | |
| Hyperlink Metric Analysis 🔨 | | | |
| Auxiliary Line Trendline Fluctuation Analys | sis (Beta) | | |

| Section | Parameter | Description |
|-------------------|--------------------|---|
| Advanced Settings | Auto Refresh | You can select this option and set the refresh interval. If you set this parameter to 5 Minutes, the system refreshes the chart every 5 minutes. |
| | Filter Interaction | After you associate multiple charts by using this feature, if you click an area or field in a chart, associated charts in the same dashboard change as expected. For more information, see Configure the filter interaction feature. |
| | Hyperlink | After you configure a hyperlink for a field in a chart and click the field, the linked report is displayed. You can select Parameter or External Link for this feature. If you select Parameter, you must configure global variables. For more information, see Configure the hyperlink feature. |
| | | |

| Section | Parameter | Description |
|-----------------|----------------------|--|
| Metric Analysis | Auxiliary Line | You can use this feature to view the difference between the value of a measure and the value indicated by the auxiliary line. The value shown by an auxiliary line is a fixed or aggregate value. Supported aggregate functions include AVG, MAX, MIN, and Median. For more information, see Auxiliary line. |
| | Trendline | A trendline displays the trend of the current data. Supported trendline types include Intelligent, Linear, Logarithmic, Exponential, Polynomial, and Power. For more information, see Metric analysis. |
| | Fluctuation Analysis | Fluctuation analysis uses machine learning algorithms to analyze the impact of dimensions on measures. You can view the contributions of dimensions to measure fluctuation and specific changes. |
| | | Onte Fluctuation Analysis is in Beta testing. |

9. Click **Save** in the upper-right corner of the page. In the Save Dashboard dialog box, specify the name and save path for the dashboard and click OK.

Configure the parameters on the Style tab

• In the Basic Information section, configure Show Title and Description, Show Link, and Chart Type.

| Parameter | Description |
|----------------------------|--|
| Show Title and Description | Title: You can customize the title of a chart. We recommend that you name the chart in the format of <i>Chart type-Chart name</i>. Image: You can set the font color of the title. Description: You can enter a description for the title. |
| Show Link | If you want users to be redirected to a report or an external page, select Show Link and specify Link Text and Link Address. |
| Chart Type | The following options are supported: line chart, area chart, stacked area chart, and 100% stacked area chart. |

• In the **Chart Type** section, configure the chart style.

| Parameter | Description |
|-------------|--|
| Show Labels | The following options are supported: Smart Display and Full Display. |

| Parameter | Description | |
|-------------|--|--|
| Line style | The following options are supported: Smooth and Straight. | |
| Show Legend | The following display modes are supported. Show Legend The following display modes are supported. | |
| Dual Y-Axis | Specifies whether to show two Y axes in the line chart. ⑦ Note If you select this option, Right Y-Axis appears in the Axes section. ✓ Dual Y-Axis Axes X-Axis Left Y-Axis Right Y-Axis | |

• In the Axes section, configure the axis style.

| Tab | Parameter | Description |
|--------|---------------------|--|
| | Axis Title | The title of the x-axis. |
| | Unit | The unit of the x-axis. |
| X-Axis | Show Title and Unit | Specifies whether to show the title and unit of the x-axis. |
| | Show Axis | Specifies whether to show the x-axis. If you select this option, configure the width and color of the axis. |
| | Gridlines | Specifies whether to show gridlines on the x-axis. If you select this option, configure the width and color of the gridlines. |
| | Show Scale | Specifies whether to show scales on the x-axis. |
| | Axis Title | The title of the left y-axis. |
| | | 1 |

| Tab | Parameter | Description |
|-------------|-----------------------|--|
| | Unit | The unit of the left y-axis. |
| | | Maximum and minimum values of the left y-axis. |
| | Minimum and Maximum | Note If you select Default , the maximum and minimum values are automatically displayed. If you clear Default , you must manually configure the maximum and minimum values. |
| Left Y-Axis | Show Title and Unit | Specifies whether to show the title and unit of the left y-axis. |
| | Show Axis | Specifies whether to show the left y-axis. If you select this option, configure the width and color of the left y-axis. |
| | Y-axis Label Settings | The display format of the axis label. The following options are supported: AutoFit , Custom , and Manual . |
| | Show Value | Specifies whether to show values on the left y-axis. |
| | Gridlines | Specifies whether to show gridlines on the left y-axis. If you select this option, configure the width and color of the gridlines. |
| | Show Scale | Specifies whether to show scales on the left y-axis. |

Note If you select Dual Y-Axis in the Chart Type section, the Right Y-Axis tab appears. For information about how to configure the parameters on this tab, see the description of the Left Y-Axis.

• In the Functionality section, specify whether to show the scroll bar.



• In the Series Settings section, configure the parameters described in the following table.

| Parameter | Description |
|----------------------|---|
| Series Name | Select a measure that has been added to the Value Axis (Mea.) field. |
| Alias | The alias of the measure displayed in a line chart. |
| Axes | The following options are supported: Default, Primary Axis, and Secondary Axis. |
| Show Labels | Specifies whether to show labels. If you select this option, configure the label color. |
| Label Shape | Specifies the label shape. The following options are supported: Circle, Hollow Circle, Diamond, and Hollow Diamond. |
| Show Boundary Values | Specifies whether to show the maximum and minimum values of the current measure. If you select this option, configure the background color of the maximum and minimum values and the line style of the measure. |
| Data Display Format | The display format of numbers. The following options are supported: AutoFit, Custom, and Manual. |

The following figure shows an updated line chart.



For information about the parameters on the Style tab, see Configure a chart.

Delete a chart

To delete a chart, perform the following steps:

- 1. Click the icon in the upper-right corner of the chart.
- 2. Select Delete.

2.3.3. Area charts

This topic introduces area charts, including an overview and an application example. This topic also describes how to configure the style of an area chart and how to delete an area chart.

Prerequisites

- A dashboard is created. For more information, see Dashboard overview and Create a dashboard.
- A dataset is created and edited based on your business requirements. For more information, see Create a dataset.

Overview

Similar to a line chart, an area chart displays the data trend and proportions within a specific period of time.

An area chart consists of a category axis and a value axis. The category axis is the horizontal axis and represents a dimension, such as date, province, or product type. The value axis is the vertical axis and represents a measure, such as a performance indicator or order quantity.

The system automatically matches dimensions with the category axis and measures with the value category. Follow the instructions to add fields.

Notice You must specify at least one dimension for the category axis and at least one measure for the value axis. You can specify only one dimension for the color legend. The color legend is applicable only when the value axis has one measure.

Application example

The following example demonstrates how to visualize the number of orders of different product types in different provinces. The *company_sales_record* dataset is used in the example.

- 1. Log on to the Quick BI console.
- 2. Click the Workspace tab. In the left-side navigation pane, click Datasets.
- 3. On the **Datasets** page, find the *company_sales_record* dataset and click the in icon in the Actions column.

? Note If you are using Quick BI Enterprise Standard, select Standard or Full Screen as the dashboard type. In this example, Standard is selected.

- 4. Click the 🔀 icon. An area chart appears in the display area of the dashboard.
- 5. Select required dimensions and measures.
 - In the Dimensions list, find province and add it to the Category Axis (Dim.) field.
 - In the Dimensions list, find product_type and add it to the Color Legend (Dim.) field.

? Note The color legend is applicable only when the value axis has one measure.

• In the Measures list, find order_number and add it to the Value Axis (Mea.) field.

Dat a analysis • Create dashboards



6. Click Update.

7. Click the **Style** tab and configure the basic information, chart type, axes, functionality, and series settings of the chart.For more information, see **Configure parameters on the Style tab**.

| Data | Style | Advanced |
|----------------------------------|-------|----------|
| Basic Information \vee | | |
| Chart Type 🗸 | | |
| Axes 🗸 | | |
| Functionality ~ | | |
| Series Settings \smallsetminus | | |

8. Click the Advanced tab, configure advanced settings and metric analysis.

| Section | Parameter | Description |
|----------|--------------------|--|
| Advanced | Auto Refresh | You can select this option and set the refresh interval. If you set this parameter to 5 Minutes, the system refreshes the chart every 5 minutes. |
| | Filter Interaction | After you configure filter interaction, if you click an area or a field in a chart, other charts that are related to the chart in the same dashboard change accordingly. For more information, see Configure the filter interaction feature. |
| | Hyperlink | After you configure the hyperlink and click a field in a chart on the dashboard, a report that shows information about this field is displayed. You can select Parameter or External Link for this feature. If you select Parameter, you must configure global variables. For more information, see Configure the hyperlink feature. |
| | | |

| Section | Parameter | Description | |
|-----------------|----------------------|--|--|
| | Auxiliary Lines | You can use this feature to view the difference between the value of a measure and the value indicated by the auxiliary line. The value shown by an auxiliary line is a fixed or aggregate value. Supported aggregate functions include AVG, MAX, MIN, and Median. For more information, see Auxiliary line. | |
| | Trendline | A trendline displays the trend of current data. Supported trendline types include Intelligent, Linear, Logarithmic, Exponential, Polynomial, and Power. For more information, see Metric analysis. | |
| Metric Analysis | | Note Stacked and 100% stacked area charts do not support this feature. | |
| | Fluctuation Analysis | Fluctuation analysis uses machine learning algorithms to analyze the impact of dimensions on measures. You can view the contribution of the dimension to measure fluctuation and the specific changes. | |
| | | Note Fluctuation Analysis is in Beta testing. Stacked and 100% stacked area charts do not support this feature. | |
| | | | |

9. Click **Save** in the upper-right corner. In the Save Dashboard dialog box, specify the name and save directory for the dashboard and click OK.

Configure parameters on the Style tab

• In the Basic Information section, configure Show Title and Description, Show Link, Custom Background, and Chart Type.

Dark Color is selected as the background color in this example.

? Note

- If you want users to be redirected to a report or an external page, select **Show Link** and specify Link Text and Link Address.
- You can configure the chart type, such as line chart, stacked area chart, and 100% stacked area chart.
- In the Chart Type section, configure Show Labels, Show Legend, Dual Y-Axis, Stacked and 100% Stacked.

100% Stacked is selected in this example.

Onte You can select Show Labels to show all measure labels. Labels support Smart Display and Full Display modes. Assume that a chart involves many dimension values and the scroll bar is not shown in the chart. In Smart Display mode, some labels are displayed. In Full Display mode, all labels are displayed.

• In the Axes section, configure Axis Title and Unit.

In this example, **province** is used as the title of the x-axis.

- In the Functionality section, set Show Scroll Bar.
- In the Series Settings section, configure Alias and Data Display Format for a measure. In this example, the data color of the Office field is set to orange.

Click Update. The following figure shows an updated area chart.



Onte For more information about the parameters on the Style tab, see Configure a chart.

Delete a chart

Click the **More Actions** icon in the upper-right corner of a chart and select **Delete** from the dropdown list to delete the chart.

2.3.4. Vertical bar charts

This topic introduces vertical bar charts, including an overview and an application example. It also describes how to configure the style of a vertical bar chart and how to delete a vertical bar chart.

Prerequisites

- A dashboard is created. For more information, see Dashboard overview and Create a dashboard.
- A dataset is created and edited based on your business requirements. For more information, see Create a dataset.

Overview

A vertical bar chart can be used to visualize data changes over a period of time or comparisons among discrete categories. For example, you can use a vertical bar chart to show the traffic volume at a crossing over different periods of time.

Similar to a line chart, a vertical bar chart consists of a category axis and a value axis.

Notice You can specify at least one dimension for the category axis, such as province or product type. You can specify at least one measure for the value axis, such as order quantity or profit. You can specify only one dimension for the color legend. The color legend is applicable only when the value axis has one measure.

Application example

The following example describes how to use a vertical bar chart to compare the shipping costs of different products in different provinces of East China. The *company_sales_record* dataset is used in the example.

- 1. Log on to the Quick BI console.
- 2. Click the **Workspace** tab. In the left-side navigation pane, click **Datasets**.
- 3. On the **Datasets** page, find the *company_sales_record* dataset and click the in icon in the Actions column.

(?) Note If you are using Quick BI Enterprise Standard, select Standard or Full Screen as the dashboard type. In this example, Standard is selected.

4. On the dashboard edit page, click the **m** icon. A vertical bar chart appears in the display section of the dashboard.

| ā t 2 | | R | * | <u></u> | " | | * | i 🧑 | • | |
|----------------|---------|----------|----------|------------|---------------|-----------|----------|------------|---|--|
| Vertical Bar (| Chart-c | ompany | _sales_ | record | | | | | | |
| | | | Furnitur | e product | s ∎ Te | | y produc | ts | | |
| | 8W | | | | ы. | | | | | |
| number | 6W | | | | | | | | | |
| | 4W | | No dat | a found in | the curre | nt chart. | | | | |
| The order | 2W | | d. | | | | 1. | | | |
| H- | | 1 | н. | | | | | | | |
| | No | ortheast | East | | North Area | | West | Southwest | | |
| | | | | | | | | | | |

5. On the **Data** tab in the **Graphic Design** section, configure the vertical bar chart.

- i. Select required dimensions and measures.
 - In the Dimensions list, find province and add it to the Category Axis (Dim.) field.
 - In the Dimensions list, find product_type and add it to the Color Legend (Dim.) field.
 - In the Dimensions list, find area and add it to the Filters field.
 - In the Measures list, find shipping_cost and add it to the Value Axis (Mea.) field.

| Data | Sty |
|----------------------|-----|
| Value Axis (Mea.) | |
| Nº order_number(SUM) | |
| Category Axis (Dim.) | |
| Str. province | |
| Color Legend (Dim.) | 1/1 |
| Str. product_type | |

? Note

- Make sure that you have converted the data type of the province and area dimensions from String to Geo. For information about how to change the data type of a dimension, see Edit a GEO dimension.
- The color legend is applicable only when the value axis has one measure.

ii. Configure a filter. In this example, select **Filter by Value** and **Multiple Select**, and then select **East** from the drop-down list.

| Set Filter | × |
|-------------------------|--|
| company_sales_reco | sir. area |
| | |
| Filter by Condition | Filter by Value 🛛 🟑 |
| Single Select OMultiple | Select |
| | Ŧ |
| Search by name. | Added Items: 0 🖉 Specify |
| Center | |
| East | |
| North | |
| Northeast | |
| Northwest | Add required items from the K left-side list. |
| South | ieit-side list. |
| Southwest | |
| | |
| Select All | |
| Add by Select Sequence | OK |

iii. Click OK.

6. Click **Update**. The chart is updated.



 On the Style tab, configure the parameters in the Basic Information, Chart Type, Axes, Functionality, and Series Settings sections. For more information, see Configure the parameters on the Style tab.

| Data | Style | Advanced |
|--------------------------|-------|----------|
| Basic Information \vee | | |
| Chart Type 🗸 | | |
| Axes 🗸 | | |
| Functionality 🗸 | | |
| Series Settings 🗸 | | |

8. On the **Advanced** tab, configure the parameters in the Advanced Settings and Metric Analysis sections.



| Section | Parameter | Description |
|-------------------|--------------------|--|
| | Auto Refresh | You can select this option and set the refresh interval. If you set this parameter to 5 Minutes, the system refreshes the chart every 5 minutes. |
| Advanced Settings | Filter Interaction | After you associate multiple charts by using this feature, if you click an area or field in a chart, associated charts in the same dashboard change as expected. For more information, see Configure the filter interaction feature. |
| | Hyperlink | Vertical bar charts do not support this feature. |
| | Auxiliary Line | You can use this feature to view the difference between the value of a measure and the value indicated by the auxiliary line. The value shown by an auxiliary line is a fixed or aggregate value. Supported aggregate functions include AVG, MAX, MIN, and Median. For more information, see Auxiliary line. |

| Section | Parameter | Description |
|-----------------|----------------------|--|
| Metric Analysis | Trendline | A trendline displays the trend of current data. Supported trendline types include Intelligent, Linear, Logarithmic, Exponential, Polynomial, and Power. |
| | Fluctuation Analysis | Fluctuation analysis uses machine learning algorithms to analyze the impact of dimensions on measures. You can view the contributions of dimensions to measure fluctuation and specific changes. |
| | | Onte Fluctuation Analysis is in Beta testing. |

9. Click **Save** in the upper-right corner of the page. In the Save Dashboard dialog box, specify the name and save path for the dashboard, and click OK.

Configure the parameters on the Style tab

• In the **Basic Information** section, configure the parameters described in the following table.

| Parameter | Description |
|----------------------------|--|
| Show Title and Description | Title: You can customize the title of a chart. We recommend that you name the chart in the format of <i>Chart type-Chart name</i>. Image: You can set the font color of the title. Description: You can enter a description for the title. |
| Show Link | If you want users to be redirected to a report or an external page, select Show Link and specify Link Text and Link Address. |
| Chart Type | The following chart types are supported: vertical bar chart, stacked vertical bar chart, and 100% stacked vertical bar chart. |

• In the **Chart Type** section, configure the chart style.

| Parameter | Description |
|-------------|---|
| Show Labels | The following options are supported: Smart Display and Full Display. |
| Show Legend | The following five display modes are supported. Show Legend The following five display modes are supported. |



• In the Axes section, configure the axis style.

| Tab | Parameter | Description | | |
|-----------|---------------------|---|--|--|
| | Axis Title | The title of the x-axis. | | |
| | Unit | The unit of the x-axis. | | |
| | Show Title and Unit | Specifies whether to show the title and unit of the x-axis. | | |
| X-Axis | Show Axis | Specifies whether to show the x-axis. If you select this option, configure the width and color of the x-axis. | | |
| | Show Value | Specifies whether to show the label on the axis. | | |
| Gridlines | Gridlines | Specifies whether to show gridlines on the x-axis. If you select this option, configure the width and color of the gridlines. | | |
| | Show Scale | Specifies whether to show scales on the x-axis. | | |
| | Axis Title | The title of the left y-axis. | | |
| | Unit | The unit of the left y-axis. | | |
| | | Maximum and minimum values of the left y-axis. | | |
| | Minimum and Maximum | Note If you select Default , the maximum and minimum values are automatically displayed. If you clear Default , you must manually configure | | |
| | | the maximum and minimum values. | | |
| | | | | |

| Tab | Parameter | Description |
|-------------|-----------------------------------|---|
| Left Y-Axis | Auto Magnify Value Differences | Specifies whether to magnify the value differences on the left y-axis. Note If you select this option, the maximum and minimum values of the axis use the actual maximum and minimum values. |
| | Show Title and Unit | Specifies whether to show the title and unit of the left y-axis. |
| | Show Axis | Specifies whether to show the left y-axis. If you select this option, configure the width and color of the left y-axis. |
| | Y-axis Label Settings | The display format of the labels on the left y-axis. The following options are supported: AutoFit , Custom , and Manual . |
| | Show Value | Specifies whether to show labels on the left-y axis. |
| | Gridlines | Specifies whether to show gridlines on the left y-axis. If you select this option, configure the width and color of the gridlines. |
| | Show Scale | Specifies whether to show scales on the left y-axis. |

Note If you select Dual Y-Axis in the Chart Type section, the Right Y-Axis tab appears. For information about how to configure the parameters on this tab, see the description of the Left Y-Axis.

• In the Functionality section, specify whether to show the scroll bar.



• In the Series Settings section, configure the following parameter for a measure.

| Parameter | Description |
|----------------------|--|
| Series Name | Select a measure that you have added to the Value Axis (Mea.) field. |
| Alias | The measure alias that is displayed on the chart. |
| Axes | The following options are supported: Default, Primary Axis, and Secondary Axis. |
| Show Labels | Specifies whether to show labels. If you select this option, you can configure the label color. |
| Show Boundary Values | If this option is selected, the maximum and minimum values in the vertical bar chart are highlighted in a specified color. |
| Data Display Format | The display format of numbers. The following options are supported: AutoFit, Custom, and Manual. |

The following figure shows the updated vertical bar chart.



Onte For information about the parameters on the Style tab, see Configure a chart.

Delete a chart

To delete a chart, perform the following steps:

- 1. Click the icon in the upper-right corner of the chart.
- 2. Select Delete.

2.3.5. Horizontal bar charts

This topic introduces horizontal bar charts, including an overview and an application example. This topic also describes how to configure the style of a horizontal bar chart and how to delete a horizontal bar chart.

Prerequisites

- A dashboard is created. For more information, see Dashboard overview and Create a dashboard.
- A dataset is created and edited based on your business requirements. For more information, see Create a dataset.

Overview

- A horizontal bar chart shows the comparison between categories and data changes over a period of time. For example, you can use a horizontal bar chart to show the working progress of employees in a project group.
- Similar to a line chart, a horizontal bar chart consists of a category axis and a value axis.

Note You must specify at least one dimension for the category axis, such as province and product type. You must specify at least one measure for the value axis, such as order quantity and profit. You can specify only one dimension for the color legend.

Sample horizontal bar chart

The following example demonstrates how to use a horizontal bar chart to compare the shipping costs of different products in different cities.

- 1. Log on to the Quick BI console.
- 2. Click the Workspace tab. In the left-side navigation pane, click Datasets.
- 3. On the **Datasets** page, find the *company_sales_record* dataset and click the in icon in the Actions column.

? Note If you are using Quick BI Enterprise Standard, select Standard or Full Screen as the dashboard type. In this example, Standard is selected.

4. Click the 🧮 icon. A horizontal bar chart appears in the display section of the dashboard.

| Horizontal E | Bar Chart-con | npany_sales | atia prd | | | |
|--------------|---------------|-------------|-------------|---------------|---------|--|
| | | ■ The or | mber1 | The order | number2 | |
| | Northeast | | | | | |
| | East | | | - | | |
| Area | Central | No data | n the c | urrent chart. | | |
| | South | | | | | |
| | | | | | | |

- 5. On the **Data** tab, select the required measures and dimensions.
 - i. Select dimensions and measures and set the filter as required.
 - In the Dimensions list, find city and add it to the Category Axis (Dim.) field.
 - In the **Dimensions** list, find product_type and add it to the **Color Legend (Dim.)** field.
 - In the Dimensions list, find city and add it to the Filters field.
 - In the Measures list, find shipping_cost and add it to the Value Axis (Mea.) field.

? Note

- Make sure that you have converted the data type of city from String to Geo. For information about how to convert the data type of a dimension, see Edit a GEO dimension.
- The color legend is applicable only when the value axis has one measure.

ii. Configure a filter.

In this example, select **Filter by Value** and **Multiple Select**. Click the downward arrow. In the drop-down list that appears, select **Beijing**, **Shanghai**, and **Tianjin**, and click **OK**.

| Set Filter | × |
|-----------------------------------|---------------------------------------|
| company_sales_reco | ◎ city |
| Filter by Condition | Filter by Value 🖌 |
| Single Select OMultiple | Select |
| Beijing?,Shanghai,Tianjin? | · |
| tianjin | Added Items: 3 🖉 Specify |
| ✓ Tianjin? | Beijing? Shanghai Tianjin? K |
| Select All Add by Select Sequence | Added Items: 3 The OK |

iii. In the Set Filter dialog box, click OK.

6. Click **Update**. The chart is updated.

| Ι. | lorizontal D | or Chart | compony | | ord | | | | Data | S |
|----|---------------|----------|---------|--------|----------------------|-------|-----|-----|-----------------------|-----|
| | lorizontal Ba | | | niture | | nique | | | Data Source Type: | |
| | | | | | | | | | Value Axis (Mea.) | |
| | Beijing? | | | | | | | | Nº shipping_cost(SUM) | |
| | | | | | | | | | Category Axis (Dim.) | |
| - | dity | | | | | | | | 🔋 city | |
| | | | | | | | | | Color Legend (Dim.) | 1/1 |
| | Tianjin? | | | | | | | | Str. product_type | |
| | | 0 | 50 | 100 | 150 shinning cost | 200 | 250 | 300 | Filters | |
| | | | | | shipping_cost | | | | © city | |

- On the Style tab, configure the parameters in the Basic Information, Chart Type, Axes, Functionality, and Series Settings sections. For more information, see Configure the parameters on the Style tab.
- 8. On the Advanced tab, configure the parameters in the Advanced Settings and Metric Analysis

sections.



| Section | Parameter | Description |
|-------------------|--------------------|--|
| | Auto Refresh | You can select this option and set the refresh interval. If you set this parameter to 5 Minutes, the system refreshes the chart every 5 minutes. |
| Advanced Settings | Filter Interaction | After you associate multiple charts by using this feature, if you click an area or field in a chart, associated charts in the same dashboard change as expected. For more information, see Configure the filter interaction feature. |
| | Hyperlink | After you configure a hyperlink for a field in a chart and click the field, the linked report is displayed. You can select Parameter or External Link for this feature. If you select Parameter, you must configure global variables. For more information, see Configure the hyperlink feature. |
| Metric Analysis | Auxiliary Line | You can use this feature to view the difference between the value of a measure and the value indicated by the auxiliary line. The value shown by an auxiliary line is a fixed or aggregate value. Supported aggregate functions include AVG, MAX, MIN, and Median. For more information, see Auxiliary line. |
| | Trendline | A trendline displays the trend of current data. Supported trendline types include Intelligent, Linear, Logarithmic, Exponential, Polynomial, and Power. For more information, see Metric analysis. |

9. Click **Save** in the upper-right corner of the page. In the Save Dashboard dialog box, specify the name and save path for the dashboard, and click OK.

Configure the parameters on the Style tab

• In the Basic Information section, configure Show Title and Description, Show Link, and Chart Type.

? Note

- If you want users to be redirected to a report or an external page, select **Show Link** and specify Link Text and Link Address.
- In the Basic Information section, you can change the chart type to a stacked horizontal bar chart or a 100% stacked horizontal bar chart.
- In the Chart Type section, configure Show Labels, Alignment, Show Legend, Dual Y-Axis, Stacked, and 100% Stacked.

Stacked is selected in the example.

• In the Axes section, configure Axis Title and Unit.

In this example, Show Scale is selected on the Bottom Axis tab.

- In the Functionality section, configure Show Scroll Bar.
- In the Series Settings section, configure Alias, Style, and Data Display Format for the measure.

Click Update. The chart is updated, as shown in the following figure.

| Stripe Chart Test | | | | | ≡ |
|-------------------|------|----------------------|-----------|---------------|---------|
| IW 80 -te sue | 1.57 | Furniture 📕 Office 📕 | Technique | | 1048 |
| Beijing | | - 0 ¹⁰⁰ | | | |
| Shanghai | | | | | |
| Shenzhen | | | | | 1048 |
| Zhongqing | | | | | |
| 0 | 400 | 800 | 1200 | 1600 | 2000 |
| Falled To . | | shippin | g_cost | | 177A g. |
| t@allyun.com | | -r@aliyun.com | | t @aliyun com | |

Onte For more information about the parameters on the Style tab, see Configure a chart.

Delete a chart

To delete a chart, perform the following steps:

- 1. Click the icon in the upper-right corner of the chart.
- 2. Select Delete.

2.3.6. Waterfall chart

This topic describes a waterfall chart, including its overview, application example, and configuration style as well as how to delete a waterfall chart.

Prerequisites

- You have logged on to the Quick BI console.
- You are familiar with operations on dashboards. For more information, see Dashboard overview and

Basic dashboard operations.

• For information about how to create a dataset, see Create a dataset.

Overview

A waterfall chart reflects the data changes and data at different time periods or under the impact of different factors. It uses a combination of absolute and relative values and is suitable for business analysis and financial analysis.

Notice For a waterfall chart, you must specify at least one dimension for the category axis such as province and product type and at most one measure for the value axis such as order quantity and profit.

Application example of a waterfall chart

The following scenario uses the *company_sales_record* dataset to compare the shipping costs for different products in different provinces of East China.

- 1. In the left-side navigation pane of the Workspace page, click **Datasets** to go to the Datasets page.
- 2. Find the *company_sales_record* dataset, and click the int icon in the Actions column corresponding to the dataset.

Note If you use Quick BI Enterprise Standard, you need to choose Standard or Full Screen as the dashboard type. The following example uses Standard as the dashboard type.

3. Click the Vertical Bar Chart icon and then click the **mathematical** icon. A waterfall chart appears in the display

area of the dashboard.



4. In the Dimensions list, find and add the area field to the Filters area.

You need to filter data of East China by using the area filter, as shown in the following figure.



5. Click the 🕎 icon. In the Set Filter dialog box, select Filter by Value for Filter by Condition, as

shown in the following figure.

| Set Filter | | \times |
|--------------------------------|-------------------------------|----------|
| <pre>@company_sales_reco</pre> | str. area | |
| | | |
| Filter by Condition | Filter by Value | |
| Single Select OMultiple | Select | |
| | | |
| Search by name. | Added Items: 0 🖉 Specify | |
| Center | | |
| East | | |
| North | | |
| Northeast | | |
| Northwest | Add required items from the K | |
| South | leit-side list. | |
| Southwest | | |
| | | |
| Select All | | |
| Add by Select Sequence | ок | |

- 6. Select East and click OK.
- 7. Find and add the province field to Category Axis (Dim.). In the Measures list, find and add the shipping_cost field to Value Axis (Mea.).
- 8. Click **Update**. The system updates the chart.
- 9. On the **Style** tab, configure Basic Information, Parameter Settings, Chart Type, Axes, and Series Settings.
- 10. Click **Save** to save the dashboard.

Configure settings on the Style tab

• In the **Basic Information** section, set Show Title and Description, Show Link, and Custom background.

Onte If you want to redirect to a report or an external page, select Show Link and specify Link Text and Link Address.

- In the **Parameter Settings** section, set Show Initial Value, Show Cumulative Value, and Show Initial Value/Cumulative Value Labels.
- In the Chart Type section, set Show Labels, Show Legend, and Color Settings.

In this example, **Show Labels** is selected and the legend is displayed on the top.

Note If multiple measures are specified for the chart, all measure labels are displayed after you select Show Labels. Labels can be displayed in either Smart Display or Full Display mode. Assume that a chart involves many dimension values and the scroll bar is not shown in the chart. In Smart Display mode, only partial labels are displayed. In Full Display mode, all labels are displayed.

• In the Axes section, set Axis Title and Unit.

In this example, **Show Scale** is selected on the X-Axis tab.

• In the Series Settings section, set Display Name and Number Formatting for a measure.

In this example, the default data display format AutoFit is used.

Click Update. The following figure shows the updated chart.



Delete a chart

Perform the following steps to delete a chart:

- 1. Click the icon in the upper-right corner of a chart.
- 2. Select Delete.

2.3.7. Combination chart

This topic describes a combination chart, including its overview, application example, and configuration style, as well as how to delete a combination chart.

Prerequisites

- You have logged on to the Quick BI console.
- You are familiar with operations on dashboards. For more information, see Dashboard overview and Basic dashboard operations.
- For information about how to create a dataset, see Create a dataset.

Overview
A combination chart displays data of different magnitudes by using dual y-axis. A combination chart can display multiple chart types, such as line chart, vertical bar chart, and area chart in stacked or 100% stacked mode. For example, you can use a combination chart to display the change trends of different projects.

A combination chart consists of a category axis, a primary value axis, and a secondary value axis.

Notice You can specify at least one dimension for the category axis, such as the order_date(year). You can specify at least one measure each for the primary and secondary value axes, such as order price or profit. You can specify only one dimension for the color legend. The legend is applicable only when one measure is specified for the primary or secondary value axis.

Application example: compare the order price and profits of multiple years

The following example uses the *company_sales_record* dataset to describe the application of a combination chart.

- 1. In the left-side navigation pane of the Workspace page, click **Datasets**.
- 2. On the Datasets page that appears, find the *company_sales_record* dataset and click in the Actions column.

? Note If you are using Quick BI Enterprise Standard, choose Standard or Full Screen as the dashboard type. The following example uses Standard as the dashboard type.

3. Click **K**. A combination chart appears in the display area of the dashboard.

4. In the Dimensions list, find and add order_date(year) to the Category Axis (Dim.) field. In the Measures list, find and add order_amt to the Primary Measures field and profit_amt to the Secondary Measures field.

? Note You can click chart type icon for the primary or secondary value axis to switch the chart type, such as vertical bar chart, line chart, or area chart.



You can click the stacked icon to change the stacked mode.

| Data Source Type: | | Datasel |
|-----------------------|----------|-----------|
| Primary Measures | Standard | compan |
| Nº LI order_amt(SUM) | Standar | d |
| | Stack | æd |
| Secondary Measures | 1009 | 6 Stacked |
| Nº 11 order_number(SL | JM) | - # t |

- 5. Click **Update**. The chart is updated.
- 6. Click the **Style** tab and configure the basic information, chart type, axes, functionality, and series settings of the chart.
- 7. Click **Save** in the upper-right corner. In the Save Dashboard dialog box that appears, enter a name for the dashboard and click OK.

Parameters on the Style tab

• In the **Basic Information** section, specify Show Title and Description, Show Link, and Custom Background.

Onte If you want to redirect to a report or an external page, select Show Link and specify Link Text and Link Address.

• In the Chart Type section, specify Show Labels, Direction, and Show Legend.

(?) Note You can select Show Labels to show all measure labels. Labels support Smart Display and Full Display modes. Assume that a chart involves many dimension values and the scroll bar is not shown in the chart. In Smart Display mode, some labels are displayed. In Full Display mode, all labels are displayed.

- In the Axes section, specify Axis Title and Unit. In this example, Show Scale is selected for the x-axis.
- In the Functionality section, configure whether to show the scroll bar.
- In the Series Settings section, specify Alias, Show Boundary Values, and Data Display Format.

② Note For more information about parameters on the Style tab, see Configure a chart.

Delete a chart

Perform the following steps to delete a chart:

- 1. Click the icon in the upper-right corner of a chart.
- 2. Select Delete.

2.3.8. Pie chart

This topic introduces pie charts, including an overview and an application example. This topic also describes how to configure the style of a pie chart and how to delete a pie chart.

Prerequisites

- You have logged on to the Quick BI console.
- You are familiar with dashboards. For more information, see Dashboard overview and Basic dashboard operations.
- A dataset is created and edited based on your business requirements. For more information, see Create a dataset.

Overview

A pie chart shows a series of data with different colors or patterns. If a pie chart has more than 12 slices, the colors of the slices are repeated. A pie chart is used to show the ratio of multiple values in proportion to their total amount, for example, the ratio of the income tax to the total personal income, or the ratio of the sales volume of a car brand to the total sales volume.

A pie chart consists of slices. The slice labels are determined by a dimension, such as area or product_type. The slice angles are determined by a measure, such as order quantity or profit.

? Note You can specify only one dimension for slice labels and only one measure for slice angles.

Sample pie chart

Scenario: Compare the shipping costs of different regions. The following example uses the *company_sales_record* dataset to describe the application of a pie chart.

- 1. In the left-side navigation pane of the Workspace page, click **Datasets**.
- 2. On the Datasets page that appears, find the *company_sales_record* dataset, and click the 📊 icon

in the Actions column. If you are using **Quick BI Enterprise Standard**, select **Standard** or **Full Screen** as the dashboard type. In this example, **Standard** is selected.

- 3. Click the 🦲 icon. A pie chart appears in the display area of the dashboard.
- 4. Click the **Data** tab and select the required dimensions and measure.
 - In the Dimensions list, find and add area to the Labels (Dim.) field.
 - In the Measures list, find and add shipping_cost to the Central Angle (Mea.) field.
 - If you want to display a large volume of data in the pie chart, you can specify the Filters field to

display specific types of data. For example, you can use the Filters field to specify an order quantity range from 50,000 to 100,000. The pie chart then displays only the cities whose order quantities are within this specific range.

| Central Angle (Mea.) | 1/1 |
|------------------------|-----|
| NO _ shipping_cost(SUM | A) |
| Labels (Dim.) | 1/1 |
| 💿 area | |
| Filters | |
| NO shipping_cost(SUM) | |

- 5. Click **Update**. The chart is updated.
- 6. Click the **Style** tab, and configure parameters in the Basic Information, Chart Type, and Series Settings sections.
- 7. Click the Advanced tab, and configure Auto Refresh, Filter Interaction Hyperlink for the pie chart.
- 8. Click **Save** in the upper-right corner. In the Save Dashboard dialog box that appears, enter a name for the dashboard and click OK.

Configure parameters on the Style tab

• In the Basic Information section, configure Show Title and Description, Show Link, and Visual Style.

| Parameter | Description |
|----------------------------|--|
| Show Title and Description | Title: You can customize the title of the pie chart. We recommend that you name the chart in the format of <i>Chart type-Chart name</i>. Image: You can set the font color of the title. Description: You can enter a description for the title. |
| Show Link | If you want the user to be redirected to a report or an external page, select Show Link and specify Link Text and Link Address. |
| Visual Style | The supported visual styles are Pie and Ring. |

• In the Chart Type section, configure the following parameters for the pie chart: Show label, Radius ratio, Merge Data into Others Category, and Show Legend.

| Parameter | Description |
|--------------|---|
| Show label | The supported labels are Dimension , measure , and percentage . You can select one or more labels at the same time. |
| Radius ratio | You can set the radius ratio of the pie chart. |

| Parameter | Description |
|------------------------------------|--|
| Merge Data into Others Category | If you select this option and specify the number of slices that you want to retain, the pie chart displays other slices as one part named "other." $\left[\begin{array}{c} \hline \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ \\ $ |
| Show Legend | The following figure shows the supported legend positions. |

• In the Series Settings section:

• Set **Display Name** for the measure.



• If **Number Formatting** is set to **Customer**, you can specify the display mode for the measure. The supported display modes are Number and Percentage. You can also set the Decimal parameter.

Note Number Formatting is set to AutoFit by default.

Delete the pie chart

To delete the pie chart, follow these steps:

- 1. Click the icon in the upper-right corner of the chart.
- 2. Select Delete.

2.3.9. Cross tables

This topic introduces cross tables, including an overview and an application example. This topic also describes how to configure the style of a cross table and how to delete a cross table.

Prerequisites

- A dashboard is created. For more information, see Dashboard overview and Create a dashboard.
- A dataset is created and edited based on your business requirements. For more information, see Create a dataset.

Overview

A cross table displays aggregates and sub-aggregates of columns and group columns. Aggregates include sums, averages, maximums, and minimums.

A cross table consists of rows and columns. Rows are horizontal and determined by dimensions such as province and product type. Columns are vertical and determined by measures such as order quantity and profit.

Precautions

Dimensions and measures are unlimited for each cross table.

Application example of a cross table

The following example compare the package designs, shipping costs, order quantities, and profits of different products in different provinces. The company_sales_record dataset is used in the example.

- 1. Log on to the Quick BI console.
- 2. Click the Workspace tab. In the left-side navigation pane, click Datasets.
- 3. On the **Datasets** page, find the *company_sales_record* dataset, and click the in icon in the Actions column.

? Note If you are using Quick BI Enterprise Standard, select Standard or Full Screen as the dashboard type. In this example, Standard is selected.

4. Click the 📊 icon.

A cross table appears in the display area of the dashboard.

| oss Table-company_sales_rec | cord_en | | | |
|-----------------------------|--------------------------|------------------------------------|---|---------------|
| Type of shipping | Order quantity | Order amount | | Profit margin |
| Big card | 813,414,343,213,414,343 | 345,345,134,299.5 | + | -120.2 |
| Big card | 212 014 343 213 414 343 | 134,313,373.3 | + | -433.3 |
| Big card | 21. No data found in the | e current chart. 134,893,134,942.4 | + | -634.9 |
| Big card | 513,414,343,213,414,343 | 678,567,434,692.3 | + | -7,373.1 |
| Big card | 663,414,343,213,414,343 | 456,313,456,435,445.3 | + | -377.9 |
| Big card | 213,414,343,213,414,343 | 135,567,678,888,134,039.6 | + | -394.7 |

5. On the Data tab, select dimensions and measures.

In the Dimensions list, find **province**, **product_type**, and **product_box** and add them to the Rows field in sequence. In the Measures list, find **order_number**, **shipping_cost**, and **profit_amt** and add them to the Columns field in sequence, as shown in the following figure.

(?) Note Make sure that you have converted the data type of the province dimension from String to Geo. For information about how to change the data type of a dimension, see Edit a GEO dimension.



6. Click **Update**. The chart is updated.

| province | product_type | product_box | order_number | shipping_cost | profit_amt ^ | Rows |
|-----------|--------------|-------------|--------------|--------------------|--------------------|----------------------------------|
| Gansu | Furniture | Large?Box | 104 | 154 | -821.52 | Str. province |
| Gansu | Furniture | Small?bag | 108 | 75.22999999999999 | 368.62 | Str. product_type |
| Gansu | Office | Medium?Box | 23 | 6.27 | -37.27 | Str. product_box |
| Gansu | Office | Paperbag | 350 | 82.4700000000001 | 81.640000000001 | |
| Gansu | Office | Small?Box | 320 | 178.17999999999999 | 1858.370000000003 | Columns |
| Gansu | Technique | Medium?Box | 21 | 19.02 | 5263.8 | , |
| Gansu | Technique | Small?Box | 303 | 232.18 | -279.9899999999999 | <pre>/** order_number(SUM)</pre> |
| Guangdong | Furniture | Huge?Box | 142 | 164.87 | -1107.850000000000 | Nº shipping_cost(SUM) |

7. On the **Style** tab, configure the chart title, layout, format, and rules.



8. On the Advanced tab, configure the auto refresh interval, filter interaction, and hyperlink.

| Data | Style | Advanced |
|---|-----------------|---|
| Advanced Settings ^ | | |
| Auto Refresh 5 Filter Interaction Hyperlink | Minutes | |
| Section | Parameter | Description |
| Advanced Settings | Auto Refresh | You can select this option and set the refresh interval. If you set this parameter to 5 Minutes, the system refreshes the chart every 5 minutes. |
| | Filter Interact | After you configure filter interaction, when you click an area or field in a chart on the dashboard, other charts that are associated with this chart on the dashboard are changed accordingly. For more information, see Configure the filter interaction feature. |
| | Hyperlink | After you configure the hyperlink, if you click a field in a chart on the dashboard, a report that shows information about this field is displayed. You can select Parameter or External Link for this feature. If you select Parameter, configure global variables. For more information, see Configure the hyperlink feature. |

9. Click **Save** in the upper-right corner. In the Save Dashboard dialog box, enter a name for the dashboard, specify a save path, and then click OK.

Configure parameters on the Style tab

• In the Basic Information section, configure whether to show the title and link.

| cross Table | | | | | Document C > | Data Style Adva |
|-------------|--------------|---------------|--------------|--------------------|----------------|---|
| province | product_type | product_box | order_number | shipping_cost | profit_amt | Basic Information A |
| Anhui | Furniture | Huge?Box | 48 | 48.8 | 379 | |
| Anhui | Furniture | Huge?Paperbag | 45 | 89.3 | -30: | Show Title and Description Title |
| Anhui | Furniture | Paperbag | 96 | 8.76 | 9! | |
| Anhui | Office | Medium?Box | 185 | 54.19999999999999 | 80.929999999 | Cross Table |
| Anhui | Office | Paperbag | 241 | 73.11999999999989 | 719.230000000 | - |
| Anhui | Office | Small?Box | 733 | 289.68999999999977 | 262.7199999999 | Description |
| Anhui | Technique | Large?Box | 27 | 26.47999999999999 | 60. | |
| Anhui | Technique | Medium?Box | 25 | 13.99 | 66 | Enter a description |
| Anhui | Technique | Small?Box | 244 | 56.41000000000004 | 2296.749999999 | Show Link |
| Anhui | Technique | Small?bag | 11 | 2.96 | -4 | |
| Beijing | Furniture | Huge?Box | 4 | 30 | -2: " | Link Text Document Cei |
| < | | | | | >) N | Link Address https://www.alibabacloud.com |

? Note If you want users to be redirected to a report or an external page, select Show Link and specify Link Text and Link Address.

• In the **Display Settings** section, you can configure the table theme, choose whether to show row numbers and whether to merge duplicate cells, configure freezing rules, and set pagination.

| | province | product_type | product_box | order_number | shipping_cost | profit_ ^ | Basic Information V |
|----|----------|--------------|---------------|--------------|--------------------|-----------|---------------------------------------|
| 1 | Anhui | Furniture | Huge?Box | 48 | 48.8 | | Display Settings ^ |
| 2 | Anhui | Furniture | Huge?Paperbag | 45 | 89.3 | | |
| 3 | Anhui | Furniture | Paperbag | 96 | 8.76 | | 🔽 Custom Table Theme |
| 4 | Anhui | Office | Medium?Box | 185 | 54.19999999999999 | 80.929 | Default Simple (No Header) Simple |
| 5 | Anhui | Office | Paperbag | 241 | 73.11999999999989 | 719.230 | Show Row Numbers |
| б | Anhui | Office | Small?Box | 733 | 289.68999999999977 | 262.7199 | Merge Same Cells |
| 7 | Anhui | Technique | Large?Box | 27 | 26.47999999999999 | | ✓ Freeze |
| 8 | Anhui | Technique | Medium?Box | 25 | 13.99 | | Auto (Table Head) |
| 9 | Anhui | Technique | Small?Box | 244 | 56.41000000000004 | 2296.749 | Columns From First Column to 0 and |
| 10 | Anhui | Technique | Small?bag | 11 | 2.96 | | Last Column to 0 |
| 11 | Beijing | Furniture | Huge?Box | 4 | 30 | ~ | |
| _ | | | | | | 3 | Wrap Text |
| | | | | | | | Pagination 20 V Records Per Page |

? Note Pagination is unavailable if you select Merge Same Cells.

• In the Functionality Settings section, configure Conditional Formatting and specify the columns you want to display. The conditional format can be set to Icon or Data Bar.

lcon

i. Select a field and set Format to Icon.

| Conditional Form | natting | |
|------------------|--------------|------------|
| Series | profit_amt | * ~ |
| Format | | |
| 🔽 Icon 💠 | 🗌 Data Bar 🗲 | |

ii. Click Icon, click the drop-down arrow, and then select an icon type.



iii. Specify values that you want to highlight, click the drop-down arrows next to the Font Color and Fill Color icons, and then specify the font and background for the values.



Use the **profit_amt** column as an example. The following rules are set for different data values. The updated table is shown in the following figure:

| | province | product_type | product_box | order_number | shipping_cost | profit_amt |
|---|----------|--------------|---------------|--------------|---------------------|--------------------|
| L | Anhui | Furniture | Huge?Box | 48 | 48.8 | û 3799.59 |
| | Anhui | Furniture | Huge?Paperbag | 45 | 89.3 | -3033.57 |
| 3 | Anhui | Furniture | Paperbag | 96 | 8.76 | € 956.73 |
| ļ | Anhui | Office | Medium?Box | 185 | 54.19999999999999 | 80.929999999999 |
| 5 | Anhui | Office | Paperbag | 241 | 73.119999999999989 | ⇒ 719.230000000001 |
| 5 | Anhui | Office | Small?Box | 733 | 289.689999999999977 | 262.71999999999999 |
| 7 | Anhui | Technique | Large?Box | 27 | 26.47999999999999 | 6027.01 |
| 3 | Anhui | Technique | Medium?Box | 25 | 13.99 | ➡ 667.33 |
| Э | Anhui | Technique | Small?Box | 244 | 56.41000000000004 | 2296.7499999999999 |
| D | Anhui | Technique | Small?bag | 11 | 2.96 | -27.66 |
| 1 | Beijing | Furniture | Huge?Box | 4 | 30 | -224.35 |
| 2 | Beijing | Furniture | Huge?Paperbag | 42 | 173.93 | -1115.96 |

- If a data value is greater than 1000, the cell of the value is highlighted in green and a green upward arrow appears next to the value.
- If a data value falls on or between 500 and 1000, the cell of the value is highlighted in blue and an orange horizontal line appears next to the value.
- If a data value is less than 500, the cell of the value is highlighted in yellow and a red downward arrow appears next to the value.

Data bar

- i. Select a field and set Format to Data Bar.
- ii. Set the upper limit, lower limit, and fill color.

⑦ Note Upper and lower limits can be configured automatically or manually.

| | | | | | | | Data | Style | Advanced |
|-------|----------|--------------|---------------|--------------|--------------------|-----------------------|-------------------------|--------------|----------|
| cross | Table | | | | | Document C > | Basic Information ~ | | |
| | province | product_type | product_box | order_number | shipping_cost | profit_amt | | | |
| 1 | Anhui | Furniture | Huge?Box | 48 | 48.8 | 3799.59 | Display Settings \sim | | |
| 2 | Anhui | Furniture | Huge?Paperbag | 45 | 89.3 | -3033.57 | Functionality Setting | 1 | |
| 3 | Anhui | Furniture | Paperbag | 96 | 8.76 | 956. <mark>7</mark> 3 | Punctionality Setting | p s ~ | |
| 4 | Anhui | Office | Medium?Box | 185 | 54.1999999999999 | 80.929999999999 | Conditional Forma | ttina | |
| 5 | Anhui | Office | Paperbag | 241 | 73.1199999999989 | 719.230000000000 | | | |
| 6 | Anhui | Office | Small?Box | 733 | 289.68999999999977 | 262.719999999999997 | Series | profit_amt | F |
| 7 | Anhui | Technique | Large?Box | 27 | 26.4799999999999 | 6027.01 | Format | | |
| 8 | Anhui | Technique | Medium?Box | 25 | 13.99 | 667.33 | lcon 💠 | 🗸 Data Bar 🗲 | |
| 9 | Anhui | Technique | Small?Box | 244 | 56.41000000000004 | 2296.7499999999995 | | | |
| 10 | Anhui | Technique | Small?bag | 11 | 2.96 | -27.66 | Upper Limit | | 1000 |
| 11 | Beijing | Furniture | Huge?Box | 4 | 30 | -224.35 | Lower Limit | Auto | 500 |
| 12 | Beijing | Furniture | Huge?Paperbag | 42 | 173.93 | -1115.96 | Lower Limit | | 500 |

Sort columns

You can sort columns or group columns. When you group columns, set the group names as shown in the following figure.

| Sort | Sort Columns | | | |) | × | | |
|-------|--------------|------------|------------|----|-----------|-----|--|-----------|
| | | | | | | | | |
| | str. pro | ovince | | | | | | |
| 1 | str.pro | oduct_type | : | | | | | |
| I | str. pro | oduct_box | | | | | | |
| | Orde | r_Numbe | r | | | | | |
| 1 | NENS | hipping_c | ost | | |] | | |
| | NE | order_num | ber | | |] | | |
| 1 | ■ profit_amt | | | | | | | |
| | | | | | | | | |
| | | Cano | el | | Save | | | |
| Cross | s Table | | | | | | | |
| | pr | rovince | product_ty | pe | product_t | xoo | | shipping_ |

| Cross | Table | | | | | Document C. | |
|-------|----------|----------------------|---------------|----------------------------------|----------------------------|------------------------|------------|
| | province | product_type | product boy | Order_ | Order_Number | | |
| | | province product_typ | | rovince product_type product_box | | order_number | profit_amt |
| 1 | Anhui | Furniture | Huge?Box | 48.8 | 48 | 3799.59 | |
| 2 | Anhui | Furniture | Huge?Paperbag | 89.3 | 45 | -3033.57 | |
| 3 | Anhui | Furniture | Paperbag | 8.76 | 96 | 956.73 | |
| 4 | Anhui | Office | Medium?Box | 54.19999999999999 | 185 | 80.929999999999 | |
| 5 | Anhui | Office | Paperbag | 73.119999999999989 | 241 | 719.230000000001 | |
| 6 | Anhui | Office | Small?Box | 289.68999999999977 | 733 | 262.719999999999997 | |
| 7 | Anhui | Technique | Large?Box | 26.47999999999999 | 27 | 6027.01 | |
| 8 | Anhui | Technique | Medium?Box | 13.99 | 25 | 667.33 | |
| 9 | Anhui | Technique | Small?Box | 56.41000000000004 | 244 | 2296.7499999999995 | |
| 10 | Anhui | Technique | Small?bag | 2.96 | 11 | -27.66 | |
| 265 | Total | | | 20566.549999999992192 | 157.4090909090909090909091 | 318852.279999999840481 | |

Show totals

After you select Show Totals, you can configure aggregates, sub-aggregates, and aggregate functions such as SUM, AVG, and MAX. You can also create an expression on which to perform the aggregation as shown in the following figure.

ONOTE Before you configure sub-aggregates, select Merge Same Cells in the Display Settings section.

| ✓ Custom Table Theme |
|---|
| 💿 Default 🔷 Simple (No Header) 🔷 Simple |
| 🔽 Show Row Numbers |
| 🔽 Merge Same Cells |
| ✓ Freeze |
| Auto (Table Head) |
| Columns From First Column to 0 and From |
| Last Column to 0 |
| □ Wrap Text |
| Pagination 20 Records Per Page |
| |
| Functionality Settings A |
| |
| Conditional Formatting |
| Series order_number 🗲 🗡 |
| Format |
| 🗌 Icon 💠 🔽 Data Bar 🚝 |
| Upper Limit 🛛 🚽 Auto |
| Lower Limit 🛛 🚽 Auto |
| |
| Color Pos 🔳 💌 Neg 📕 💌 |
| Color Pos Veg Version Sort Columns Previous Operation |
| |
| Sort Columns Previous Operation 🖻 🖉 |
| Sort Columns Previous Operation 🖻 🖉 |

• In the Series Settings section, set field names, alignment mode, and number format.

Delete a chart

Click the **More Actions** icon in the upper-right corner of a chart and select **Delete** from the dropdown list to delete the chart.

Create a data download task

- 1. Click the icon in the upper-right corner of a chart.
- 2. Select Create Download. The Download Tasks dialog box appears.

You can check Start Time, Status, and Actions of tasks.

(?) Note Status includes Running, Successful, and Error. If an error occurs, handle it as prompted.

Data download task

- 1. Click the icon in the upper-right corner of the chart.
- 2. Select Create Download. The Download Tasks dialog box appears.
 - Check Start Time, Status, and Actions of tasks.
 - \circ Click the 🛃 icon in the Actions column to obtain the historical data download tasks.

Onte The number of entries for offline downloads and previews cannot exceed one million.

2.3.10. Pivot table

This topic describes a pivot table, including its overview, application example, and configuration style as well as how to delete a pivot table.

? Note Pivot tables are available only in Quick BI Enterprise Standard.

Prerequisites

- You have logged on to the Quick BI console.
- You are familiar with operations on dashboards. For more information, see Dashboard overview and Basic dashboard operations.
- For information about how to create a dataset, see Create a dataset.

Overview

A pivot table can be used to display the aggregates of variables and allows you to drill into data in a tree structure. One variable defines the values in the header row while the other variable defines the values in the header column. Aggregation methods include SUM, AVG, COUNT, MAX, and MIN.

Similar to a Cross tables, a pivot table consists of rows and columns. Rows are horizontal and determined by dimensions such as province and product type. Columns are vertical and determined by measures such as order quantity and profit.

Notice For each pivot table, the numbers of dimensions and measures are unlimited.

Application example

Scenario: Compare multiple types of products with different package designs, order quantities, and order prices across multiple provinces. The following example uses the *company_sales_record* dataset to describe the application of a pivot table.

1. In the left-side navigation pane of the Workspace page, click **Datasets**.

2. In the Datasets page that appears, find the *company_sales_record* dataset and click in the Actions column.

Note If you are using **Quick BI Enterprise Standard**, choose **Standard** or **Full Screen** as the dashboard type. The following example uses **Standard** as the dashboard type.

- 3. On the dashboard edit page, click
- . A pivot table appears in the display area of the dashboard.



4. Click the Data tab and select dimensions and measures for the pivot table.

In the Dimensions list, find and add province, product_type, and product_box to the Rows (Dim.) field, and find and add order_number and order_amt to the Values (Mea.) field, as shown in the following figure.

Note Ensure that you have converted the dimension type of province from String to Geo. For information about how to convert the dimension type, see Change field types.



- 5. Click **Update**. The chart is updated.
- 6. Click the **Style** tab to configure the basic information, display settings, and functionality settings of the chart.



7. Click the plus sign (+) next to the value to drill into the data in a tree structure.

For example, when you click the plus sign (+) next to **Shanghai**, data about product types and product boxes is displayed in a tree structure.

| Pivot Table-company_sales_record_en_0514 | | |
|--|--------------|--------------------|
| province | order_number | order_amt |
| + Ningxia | 718 | 75378.7579999991 |
| + Qinghai | 44 | 648.749499999999 |
| + Shandong | 794 | 46805.2839999997 |
| - Shanghai | 269 | 13457.018 |
| + Furniture | 103 | 9449.278 |
| + Office | 120 | 3672.23 |
| - Technique | 46 | 335.51 |
| Small?bag | 46 | 335.51 |
| + Shanxi | 2155 | 119845.1570000002 |
| + Sichuan | 170 | 5584.483999999995 |
| + Tianiin | 963 | 56280.231499999994 |

8. Click **Save** in the upper-right corner. In the Save Dashboard dialog box that appears, enter a name for the dashboard and click OK.

Parameters on the Style tab

• In the Basic Information section, set Show Title and Description and Show Link.

? Note If you want to redirect to a report or an external page, select Show Link and specify Link Text and Link Address.

• In the Display Settings section, set Show Row Numbers, Freeze, and Wrap Text.

In this example, Show Row Numbers is selected.

• In the Functionality Settings section, configure conditional formatting and whether to show totals. For more information, see Functionality settings.

In this example, conditional formatting is enabled and Show Totals is selected.

• In the Series Settings section, specify Name, Description, Align, and Number Formatting.

The updated chart is shown as follows.

| Pivot ' | Table | maliyun com | malivin con |
|---------|------------|--------------|--------------------|
| | province | order_number | order_amt |
| 19 | Ningxia | 4752 | 343454.94699999987 |
| 20 | 🖬 Qinghai | 542 | 40510.3850000001 |
| 21 | Shandong | 3640 | 270684.1460000007 |
| 22 | 🖶 Shanghai | 1030 | 61532.68900000006 |
| 23 | Shanxi | 17312 | 1185756.103500001 |
| 24 | Sichuan | 2554 | 192281.8115000001 |
| 25 | 🖬 Tianjin | 5571 | 367681.9585000001 |
| 26 | Xicang | Soliyun Con | 36392.48450000006 |

Delete a chart

Perform the following steps to delete a chart:

- 1. Click the icon in the upper-right corner of a chart.
- 2. Select Delete.

2.3.11. Colored maps

This topic describes colored maps, including an overview and an application example. This topic also describes how to configure the style of a colored map and how to delete a colored map.

Prerequisites

- A dashboard is created. For more information, see Dashboard overview and Create a dashboard.
- A dataset is created and edited based on your business requirements. For more information, see Create a dataset.

Overview

Similar to a bubble map, a colored map displays data in a single hue with different saturation levels.

A colored map consists of colorscales and geographic locations. Geographic locations are determined by a dimension, such as province. Colorscales are determined by measures, such as order price and profit.

♥ Notice

You can specify only one dimension for geographic locations. The dimension type must be Geo. You can specify one to five measures for colorscales.

Application example

The following example demonstrates how to use a colored map to compare the shipping costs, order prices, and profits in different regions. The *company_sales_record* dataset is used in the example.

- 1. Log on to the Quick BI console.
- 2. Click the Workspace tab. In the left-side navigation pane, click Datasets.
- 3. On the **Datasets** page, find the *company_sales_record* dataset and click the in icon in the Actions column.

? Note If you are using Quick BI Enterprise Standard, select Standard or Full Screen as the dashboard type. In this example, Standard is selected.

4. Click the 📷 icon. A colored map appears in the display section of the dashboard.



- 5. On the Data tab, select the required dimension and measures.
 - In the Dimensions list, find area and add it to the Geo Location (Dim.) field.
 - In the Measures list, find order_amt, profit_amt, and shipping_cost, and add them to the Colorscale (Mea.) field.

Note Make sure that you have converted the data type of the area field from String to Geo. For information about how to convert the data type of a dimension, see Edit a GEO dimension.

- 6. Click **Update**. The chart is updated.
- 7. On the **Style** tab, configure the title, display style, color, display range, and series settings of the colored map.
- 8. On the **Advanced** tab, configure the parameters described in the following table.

| Section | Parameter | Description |
|-------------------|--------------------|--|
| | Auto Refresh | You can select this option and set the refresh interval. If you set this parameter to 5 Minutes, the system refreshes the chart every 5 minutes. |
| | Filter Interaction | After you associate multiple charts by using this feature, if you click an area or field in a chart, associated charts in the same dashboard change as expected. For more information, see Configure the filter interaction feature. |
| Advanced Settings | | |

| Section | Parameter | Description |
|---------|-----------|---|
| | Hyperlink | After you configure a hyperlink for a field in a chart and click the field, the linked report is displayed. You can select Parameter or External Link for this feature. If you select Parameter, you must configure global variables. For more information, see Configure the hyperlink feature. |

9. Click **Save** in the upper-right corner of the page. In the Save Dashboard dialog box, specify the name and save path for the dashboard, and click OK.

Configure the parameters on the Style tab

• In the **Basic Information** section, configure Show Title and Description, Show Link, and Style Template.

Note If you want users to be redirected to a report or an external page, select **Show Link** and specify Link Text and Link Address.

You can set Style Template to configure the map color. Three templates are provided.

In the Chart Style section, configure Display Place Names, Map Color, and Legend Configuration.
 Display Place Names: You can select Smart or All. If a large number of place names exist, we

| Smart display mode |
|--------------------|
| All display mode |

recommended that you select Smart.

- Map Color: You can configure the color range, transparency, and colors for maximum and minimum values.
- Legend Configuration: You can select Ranking or Distribution.

| Colored Map-company_sales_record_en_0514 | ÷ | Smart All |
|--|---|--|
| shipping_cost 299 - 1.34K 1.34K - 2.38K 2.38K - 3.42K 3.42K - 4.46K | | Map Color Coloring Range Min ♥ Auto Interval Max ♥ Auto 299.17999999 5 V 5505.2599999 |
| • 4.46K-5.51K | | Hierarchical data 👷 Auto 👷 optimization Color 🚽 🛶 🗸 Color V Transparency 🛖 80 % |
| a fut a fait of the second sec | | Legend Configuration |
| | + | Functionality A |

• In the Functionality section, configure Statistics Settings, which includes Display Range and Display Content.

| Functionality A | | | | | |
|---------------------|-------------|--------------|--|--|--|
| Statistics settings | 3 | | | | |
| Display | Country map | V | | | |
| range | | | | | |
| Display | China | \checkmark | | | |
| content | | | | | |

? Note If you select Country Map for Display Range, six countries appear in the Display Content drop-down list: China, Singapore, Germany, Mexico, Japan, and United States.

• In the Series Settings section, configure Display Name and Number Formatting for a measure.



Delete a chart

To delete a chart, perform the following steps:

- 1. Click the icon in the upper-right corner of the chart.
- 2. Select Delete.

2.3.12. Bubble maps

This topic introduces bubble maps, including an overview and an application example. This topic also describes how to configure the style of a bubble map and how to delete a bubble map.

Prerequisites

- A dashboard is created. For more information, see Dashboard overview and Create a dashboard.
- A dataset is created and edited based on your business requirements. For more information, see Create a dataset.

Overview

A bubble map uses a map profile as its background and shows the distribution of data metrics in a country or region by using bubbles of different sizes. For example, you can use a bubble map to display tourist arrivals of different destinations or the average incomes in different regions.

A bubble map consists of geographic locations and bubbles of different sizes.

- Geographic locations are determined by a dimension, such as province.
- The bubble size is determined by a measure, such as the shipping cost or order quantity.

✓ Notice

Application example

The following example describes how to use a bubble map to compare the order quantities and profits in different provinces. The *company_sales_record* dataset is used in the example.

- 1. Log on to the Quick BI console.
- 2. Click the Workspace tab. In the left-side navigation pane, click Datasets.
- 3. On the **Datasets** page, find the *company_sales_record* dataset and click the int icon in the Actions column.

? Note If you are using Quick BI Enterprise Standard, select Standard or Full Screen as the dashboard type. In this example, Standard is selected.

4. On the dashboard edit page, click the 📷 icon.



5. Click the Data tab and select the required measures and dimension.



- In the Dimensions list, find province and add it to the Geo Location (Dim.) field.
- In the Measures list, find order_number and add it to the Bubble Size (Mea.) field.
- In the Measures list, find profit_amt and add it to the Bubble Color/Measures field.

Once Make sure that you have converted the data type of the province dimension from String to Geo. For information about how to change the data type of a dimension, see Change field types.

- 6. Click **Update**. The chart is updated.
- 7. On the **Style** tab, configure the title and display style of the bubble chart, the bubble size and color, the display range, and the series settings.

For more information, see Configure parameters on the Style tab.

8. On the Advanced tab, configure the following parameters.

| Section | Parameter | Description |
|-------------------|--------------------|---|
| | Auto Refresh | If you select this option, the system refreshes the chart at the specified interval. For example, if you select this option and select 5Minutes from the drop-down list, the system refreshes the chart every 5 minutes. |
| Advanced Settings | Filter Interaction | After you configure filter interaction, if you click an area or field in a chart, charts that are associated with this chart in the same dashboard accordingly change. For more information, see Configure the filter interaction feature. |
| | Hyperlink | After you configure the hyperlink, if you click a field in a chart on the dashboard, a report that shows information about this field is displayed. You can select Parameter and External Link for this feature. Global parameters are used if you select Parameter. For more information, see Configure the hyperlink feature . |

9. Click **Save** in the upper-right corner. In the Save Dashboard dialog box, enter a name for the dashboard, specify the save path, and then click OK.

Configure parameters on the Style tab

• In the Basic Information section, configure Show Title and Description, Show Link, and Style Template.

(?) Note If you want users to be redirected to a report or an external page, select Show Link and specify Link Text and Link Address. If you click a field in the chart, you are redirected to the linked report or an external link.

You can set **Style Template** to configure the map color. Three templates are provided.

- In the Chart Style section, configure Display Place Names, Map Configuration, Shape, Bubble Color, Bubble Size, and Legend Configuration.
 - Display Place Names: You can select **Smart** or **All**. We recommend that you select Smart if a large number of place names exists.
 - Under Map Configuration, you can configure Color, **Transparency** and **Border**.

• Supported bubble shapes are shown in the following figure.



- You can configure Color, Transparency, and colors for maximum and minimum values.
- Bubble Size: You can specify the bubble size.
- You can select **Ranking** or **Distribution** for Legend Configuration.
- In the Functionality section, configure Statistics Settings, which includes Display Range and Display Content.



(?) Note If you select Country Map for Display Range, six countries appear in the Display Content drop-down list: China, Singapore, Germany, Mexico, Japan, and United States.

• In the Series Settings section, configure Alias and Data Display Format for a measure.



Delete a chart

Click the **More Actions** icon in the upper-right corner of a chart and select **Delete** from the dropdown list to delete the chart.

2.3.13. Gauge

This topic introduces gauges, including an overview and an application example. This topic also describes how to configure the style of a gauge and how to delete a gauge.

Prerequisites

• You have logged on to the Quick BI console.

- You are familiar with dashboards. For more information, see Dashboard overview and Basic dashboard operations.
- A dataset is created and edited based on your business requirements. For more information, see Create a dataset.

Overview

Similar to a dashboard on a car, a gauge shows the value range of a specific metric. You can view the progress of a current task or determine whether a metric exceeds its value range in a gauge. For example, you can use a gauge to obtain the inventory status of a commodity, so you can replenish the inventory in a timely manner.

The pointer angle of a gauge is determined by a measure, such as the discount or profit.

Notice You can specify only one measure for the pointer angle.

Application example

Scenario: Display the order price. The following example uses the *company_sales_record* dataset to describe the application of a gauge.

- 1. In the left-side navigation pane of the Workspace page, click Datasets.
- 2. On the Datasets page that appears, find the *company_sales_record* dataset, and click the int icon in the Actions column.

? Note If you are using Quick BI Enterprise Standard, select Standard or Full Screen as the dashboard type. In this example, Standard is selected.

- 3. Click the 👩 icon. A gauge appears in the display area of the dashboard.
- 4. Click the Data tab and select the required measure.

In the Measures list, find and add order_amt to the Pointer Angle (Mea.) field.



- 5. Click **Update**. The chart is updated.
- 6. Click the **Style** tab and configure parameters in the Basic Information, Functionality, Style Settings, and Series Settings sections.
- 7. Click **Save** in the upper-right corner. In the Save Dashboard dialog box that appears, enter a name for the dashboard and click OK.

Configure parameters on the Style tab

• In the **Basic Information** section, specify Show Title and Description, Show Link, and Visual Style. Quick BI supports three styles: Standard, Sector, and Scale.

Once If you want the user to be redirected to a report or an external page, select Show Link and specify Link Text and Link Address.



• In the Functionality section, specify the minimum and maximum values for the metric in the gauge. You can specify fixed or dynamic minimum and maximum values. The dynamic values are calculated by using aggregate functions.



• In the **Style Settings** section, specify the label display mode and ranges for the gauge. You can configure the number of ranges, step for defining ranges, and range colors in the Display Ranges area.



• In the Series Settings section, specify Display Name, Description, and Number Formatting for the measure.



Delete a chart

Perform the following steps to delete a chart:

- 1. Click the icon in the upper-right corner of a chart.
- 2. Select Delete.

2.3.14. Radar charts

This topic describes the overview, examples, and deletion of a radar chart.

Make sure that you have read Dashboard overview and Dashboard basic operations before reading this topic. For more information about how to create a dataset, see Create a dataset.

Overview

Radar charts display numbers and ratios obtained from data analysis. You can view the changing trends of indicators by using radar charts. For example, sales of all areas are represented by numbers and ratios in radar charts.

A radar chart is based on labels and lengths. Labels are based on dimensions such as product types. Lengths are based on measures such as shipping costs.

Notes

You can select a minimum of one and a maximum of two dimensions for the labels of a radar chart. The number of dimension values must be greater than or equal to three and less than or equal to 12. You need to select a minimum of one dimension for the length.

Samples



Examples

The following example uses the company_sales_record dataset.

- 1. Log on to the Quick BI console.
- 2. Click Datasets to go to the Datasets page.
- 3. Select the company_sales_record dataset and click the **Create Dashboard** icon in the Actions column.

Onte If you use Quick BI Enterprise Standard, you need to select Standard or Full Screen as the dashboard display mode. The following example uses Standard.

- 4. Click the Radar Chart icon and an empty chart appears on the dashboard.
- 5. On the Data tab page, select dimensions and measures.

In the Dimensions list, locate the **area** field and add it to Labels (Dimensions). In the Measures list, locate the **order_number** and **order_amt** fields and add them sequentially to Length (Measures).

Note Make sure that you have converted the dimension type of the area field from String to Geo.



6. Click **Update** and the chart is updated.

7. On the Style tab page, you can configure the title name, layout, and legend.



8. Click **Save** to save the dashboard.

Configure the style

• In the Basic Information section, you can configure the title name, hyperlink, and background color. This example uses **Domestic data** as the title name and uses **Dark** as the background color.

? Note For jumping to a report or an external page, select Show Hyperlink and enter a name and an address.

- In the Layout section, you can configure the legend position and whether to show tooltips, areas, and labels.
- In the Series Settings section, you can configure aliases for dimensions, data formats, and numbers of decimal places. This example uses red as the line color for the **order_number** field.

Click Update and the chart is updated as shown in the following figure.



Delete a chart

Click the **More Actions** icon in the upper-right corner of a chart and select **Delete** from the dropdown list to delete the chart.

2.3.15. Facet scatter chart

This topic describes a facet scatter chart, including its overview, application example, and configuration style, as well as how to delete a facet scatter chart.

Prerequisites

- You have logged on to the Quick BI console.
- You are familiar with operations on dashboards. For more information, see Dashboard overview and Basic dashboard operations.
- If you want to edit a dataset or create a dataset, see Create a dataset.

Overview

A facet scatter chart shows data correlation and distribution.

A facet scatter chart consists of one or more x-axes and a y-axis. You can specify a maximum of three measures for the x-axes, only one measure for the y-axis, and only one dimension, such as product type, for the color legend.

Notice The Dimensions list can have a maximum of 1,000 values.

Application example

Scenario: Compare the unit prices and order quantities of different products. The following example uses the *company_sales_record* dataset to describe the application of a facet scatter chart.

- 1. In the left-side navigation pane of the Workspace page, click Datasets.
- 2. On the Datasets page that appears, find the *company_sales_record* dataset, and click in the

Actions column.

? Note If you are using Quick BI Enterprise Standard, choose Standard or Full Screen as the dashboard type. The following example uses Standard as the dashboard type.

- 3. Click . A facet scatter chart appears in the display area of the dashboard.
- 4. Click the Data tab and select the required dimensions and measures.

| Data Source Type: | Dataset |
|----------------------------|--|
| Y Axis (Mea.) 1 / 1 | company_sales_record ~ |
| X Axis (Mea.) 1 / 3 | Dimensions report_uate(quarte report_date(month report_date(week) |
| Color Legend (Dim.) 1 / 1 | report_date(day) Str. customer_name Str. order_level |
| Filters | str. shipping_type str. product_type str. product_sub_type |
| Drag and drop fields here. | str. product_name str. product_box |
| | Measures = |

- 5. Click Update. The chart is updated.
- 6. Click the **style** tab and configure the basic information, design, and layout of the chart.
- 7. Click **Save** in the upper-right corner. In the Save Dashboard dialog box that appears, enter a name for the dashboard and click OK.

Parameters on the Style tab

• In the **Basic Information** section, specify Show Title and Description, Show Link, and Custom Background.

? Note If you want to redirect to a report or an external page, select Show Link and specify Link Text and Link Address.

• In the **Design** section, you can select Axis Title to display axis titles.

In this example, Axis Title is selected.

• In the Layout section, specify Show Legend and Show Tooltip.

Delete a chart

Perform the following steps to delete a chart:

- 1. Click the icon in the upper-right corner of a chart.
- 2. Select Delete.

2.3.16. Bubble chart

This topic introduces bubble charts, including an overview and an application example. This topic also describes how to configure the style of a bubble chart and how to delete a bubble chart.

Prerequisites

- You have logged on to the Quick BI console.
- A dashboard is created. For more information, see Dashboard overview.
- A dataset is created and edited based on your business requirements. For more information, see Create a dataset.

Overview

A bubble chart is similar to a scatter chart. The only difference is that the bubble chart allows you to specify a measure to indicate the bubble size.

A bubble chart consists of an x-axis, a y-axis, a category, bubble colors, and bubble sizes. The x-axis is determined by a dimension or measure. The y-axis is determined by a measure. The category is determined by a dimension. Bubble colors are determined by a dimension or measure. Bubble sizes are determined by a measure.

✓ Notice

- You can specify only one dimension or measure for the x-axis and only one measure for the y-axis.
- You can specify the same dimension or measure for bubble colors as that for the x-axis, y-axis, or category.
- You can specify the same measure for sizes as that for the x-axis or y-axis.

Application example

Scenario: Compare the unit prices and order quantities of different products in different regions. The following example uses the *company_sales_record* dataset to describe the application of a bubble chart.

- 1. In the left-side navigation pane of the Workspace page, click Datasets.
- 2. On the Datasets page that appears, find the *company_sales_record* dataset, and click the int in the Actions column.

? Note If you are using Quick BI Enterprise Standard, select Standard or Full Screen as the dashboard type. In this example, Standard is selected.

3. Click the 💽 icon. A bubble chart appears in the display area of the dashboard.



4. Click the **Data** tab, select the required dimensions and measures, and add them to the relevant fields.



- 5. Click **Update**. The chart is updated.
- 6. Click the **Style** tab and configure parameters in the Basic Information, Chart Style, Axes, Functionality, and Series Settings sections.

| Graphic Design | 喿 Cl | nange Chart Type 🔻 |
|--|-------|--------------------|
| Data | Style | Advanced |
| Basic Information $$ | | |
| Chart Type 🗸 | | |
| Axes 🗸 | | |
| Functionality \vee | | |
| Series Settings ${\scriptstyle 	imes}$ | | |

7. Click the **Advanced** tab and configure parameters in the **Advanced Settings** and **Metric Analysis** sections. You can configure the trendline and cluster analysis only if a measure is specified for the x-axis. For more information, see Drilling, filter interaction, and hyperlink and Metric analysis.

| Graphic Design | | Ch | ange Chart Type • |
|-----------------------|------------|----|-------------------|
| Data | Style | | Advanced |
| Advanced Settings ^ | | | |
| Auto Refresh | | | |
| No Refresh | | | ~ |
| Filter Interaction | | | |
| Hyperlink | | | |
| Metric Analysis \land | | | |
| Gridlines | | | |
| Trendline | | | |
| Anomaly Detection | (Beta) 📕 👻 | | |
| Clustering (Beta) | | | |

Onte After Clustering is selected on the Advanced tab, the value of the Color (Dim. or Mea.) field becomes Clustering, and similar measure values are displayed as a cluster.

8. Click **Save** in the upper-right corner. In the Save Dashboard dialog box that appears, enter a name for the dashboard and click OK.

Configure parameters on the Style tab

• In the **Basic Information** section, configure Show Title and Description, Show Link, and Custom Background.

Once If you want the user to be redirected to a report or an external page, select Show Link and specify Link Text and Link Address.

• In the Chart Type section, specify Show Labels, Show Legend, Data Point Color, and Bubble Size.



⑦ Note The Data Point Color field is available only when the Color (Dim. or Mea.) field is specified. If the Color (Dim. or Mea.) field is set to a dimension, you can select a hue for the dimension or specify a color for each value of the dimension. If the Color (Dim. or Mea.) field is set to a measure, you must specify the value range and the number of intervals, and then specify a color for each interval.

| Chart Type \land | |
|----------------------------|-----------------------------|
| ✓ Show Labels | |
| 🔵 Smart Display 🛛 🗿 Full D | Display |
| Show Legend | |
| | |
| | |
| Data Point Color | |
| Coloring Range | |
| Min 🔽 Auto Interv | 'al Max <mark>v</mark> Auto |
| 747225.9465 none | ✓ 5673792.36750 |
| | |
| • | |
| | |
| Color | • |
| Data Point Size | |
| | |
| | |

• In the Axes section, configure the basic information about the x-axis and the y-axis.

| Axes 🔿 | | | |
|-------------|-----------------------------|-------------|------------------------|
| | X-Axis | Left Y-, | Axis |
| Axis Title | order_number | | |
| Unit | | | |
| | | | 🖌 Default |
| | | | <mark> D</mark> efault |
| 🗌 Auto Ma | gnify Value Differer | ices | |
| 🛃 Show Ti | tle and Unit | | |
| Show A | | × • | |
| Y-axis Labe | el Settings oFit Custome | er 🔿 Manual | |
| AutoFi | t (English) 🗸 🗸 | | |
| V Show Va | | | |
| Gridline: | | | |
| Show Se | ale v 1px | | |

• In the Functionality section, enable the four-quadrant feature.

| Functionality ^ | |
|--|-------------------------------|
| V Enable Four Quadrants | • • |
| Quadrant Name | |
| Upper Right Quadra | ant Large X and Y Values |
| Upper Left Quadrar | It Small X and Large Y |
| Lower Left Quadrar | t Small X and Y Values |
| Lower Right Quadra | ant Large X and Small Y |
| Quadrant Axis | |
| •••••• | 1px ∨ ■▼ |
| Axis Value | |
| Center in Char Custom | t Average Value |
| X-Axis | |
| Y-Axis | Enter the value on the y-axis |
| \sim | |

- (?) Note This feature can be enabled only when measures are specified for the x and y axes.
- In the Series Settings section, specify Display Name and Number Formatting for each measure. If Number Formatting is set to Customer, specify the data format (Number of Percentage) and set Decimal.

| | Southwest Nor | thwest • Center | North Northeast Office | • East • Sou | |
|---|--|----------------------------------|--|------------------------|--------|
| 6K 5K 4K 3X 2 2K 1K 0 | Office Office imiture Technique | Office Technique Technique | Office Technique ^F urniture | Furniture Technique | Office |
| 0 | 4K | 8K | 12K | 16K | 20K |
| - | | | price | | - |

Click Update. The following figure shows the updated bubble chart.

Delete a chart

Perform the following steps to delete a chart:

- 1. Click the icon in the upper-right corner of a chart.
- 2. Select Delete.

2.3.17. Scatter chart

This topic introduces scatter charts, including an overview and an application example. This topic also describes how to configure the style of a scatter chart and how to delete a scatter chart.

Prerequisites

- You are familiar with operations on dashboards. For more information, see Dashboard overview and Basic dashboard operations.
- A dataset is created and edited based on your business requirements. For more information, see Create a dataset.

Overview

Scatter charts show data correlation and distribution. A scatter chart takes one variable as the x-axis and the other variable as the y-axis, and represents the general trend of the dependent variable (y) that changes in respect to the independent variable (x). Scatter charts can also show data distribution from category and color.

A scatter chart consists of a y-axis, an x-axis, a category, and colors. The y-axis is determined by a measure. The x-axis is determined by a dimension or measure. The category is determined by a dimension. Colors are determined by a dimension or measure.

♥ Notice

- You can specify only one dimension or measure for the y-axis, x-axis, category, and colors.
- You can specify the same dimension or measure for colors as that for the x-axis, y-axis, or category.

Application example

Scenario: Compare the unit prices and order quantities of different products in different regions. The following example uses the *company_sales_record* dataset to describe the application of a scatter chart.

- 1. Log on to the Quick BI console.
- 2. Click the Workspace tab. In the left-side navigation pane, click Datasets.
- 3. On the **Datasets** page that appears, find the *company_sales_record* dataset and click the **an** icon in the Actions column.

? Note If you are using Quick BI Enterprise Standard, select Standard or Full Screen as the dashboard type. In this example, Standard is selected.

- 4. Click the ficon. A scatter chart appears in the display area of the dashboard.
- 5. Click the Data tab and select the required measures and dimensions.
| Data Source Type: | | |
|---------------------------|-----|----------------------------------|
| r axis (Mea.) | 1/1 | testMysqllxt 🗸 🛛 |
| Nº price(SUM) | | |
| K axis (Dim. or Mea.) | 1/1 | Dimensions • 🗁 area Hierarchy |
| Nº order_number(SUM) | | erea |
| | | o province |
| Category (Dim.) | 1/1 | © city str. order_id |
| ∣ ⊗ area | | ✓ ♣ report_date |
| Color (Dim. or Mea.) 🛈 | 1/1 | <pre>report_date(year)</pre> |
| ⊚ area | | i report_date(month) |
| | | report_date(week) |
| -ilters | | <pre>report_date(day)</pre> |
| Drag and drop fields here | | report_date(minute) |
| | | Measures 📟 |
| | | ✓ Default Nº order_number |
| | | Nº order_amt |

- 6. Click **Update**. The chart is updated.
- 7. Click the **Style** tab, and configure parameters in the Basic Information, Chart Type, Axes, Functionality, and Series Settings sections.



8. Click the Advanced tab, and configure parameters in the Advanced Settings and Metric Analysis sections. The Trendline and Clustering functions are available only when a measure is specified for the x-axis.

| Gra | phic Design | | R | Change Chart Type 🕶 |
|-------|--------------------------|-------|---|---------------------|
| | Data | Style | | Advanced |
| Adva | nced Settings ^ | | | |
| Aut | o Refresh | | | |
| | No Refresh | | | ~ |
| Filte | er Interaction | | | / |
| Нур | erlink | | | / |
| Metri | c Analysis 🔨 | | | |
| Gric | llines | | | / |
| Trei | ndline | | | / |
| | Anomaly Detection (Beta) | | | |
| | Clustering (Beta) | | | |

For more information, see Drilling, filter interaction, and hyperlink and Metric analysis.

Note After the Clustering function is enabled, the value of the Color field changes to Clustering, and data points with similar x values and y values are displayed in a cluster.

9. Click **Save** in the upper-right corner. In the Save Dashboard dialog box that appears, enter a name for the dashboard and click OK.

Configure parameters on the Style tab

• In the **Basic Information** section, configure Show Title and Description, Show Link, and Custom Background.

Note If you want the user to be redirected to a report or an external page, select **Show** Link and specify Link Text and Link Address.

• In the Chart Type section, configure Show Labels, Show Legend, and Data Point Color.

| Chart Type 🔿 |
|------------------|
| Show Labels |
| Show Legend |
| Data Point Color |
| Color Business - |
| Data Point Size |

? Note The colors of data points vary based on the data type of the Color field. If the Color field is not specified, the Data Point Color field does not appear. When the Color field is set to a dimension, you can select a color palette or specify a color for each field. When the Color field is set to a measure, you must specify the value range of the measure and the number of intervals, and then specify colors for the intervals.

• In the Axes section, configure basic information about the x-axis and y-axis.

| Axes < | | | |
|-------------|----------------------|-------------|---------|
| | | | |
| | X-Axis | Left Y-# | xis |
| | | | |
| Axis Title | order_number | | |
| Unit | | | |
| | | | Default |
| | | | Default |
| 🗌 Auto Ma | gnify Value Differer | ices | |
| 🔽 Show Ti | tle and Unit | | |
| 🛃 Show A | dis | | |
| - | — ~ 1px | v • | |
| Y-axis Labe | el Settings | | |
| 🔾 🔾 | oFit 🔵 Custome | er 🔵 Manual | |
| AutoFi | t (English) 🛛 🗸 | | |
| 🛃 Show Va | alue | | |
| Gridline: | 3 | | |
| | — ~ 1px | × • | |
| Show S | cale | | |

• In the Functionality section, enable the four-quadrant function as required.

| Z Enable Four Quadrants 🛈 | | |
|-----------------------------------|----------------------|--|
| Quadrant Name | | |
| Upper Right Quadrant | Large X and Y Values | |
| Upper Left Quadrant | Small X and Large Y | |
| Lower Left Quadrant | Small X and Y Values | |
| Lower Right Quadrant | Large X and Small Y | |
| Quadrant Axis | | |
| | | |
| ••••• 1p | x × | |
| Axis Value | × | |
| | × | |
| Axis Value Center in Chart Custom | | |

Onte This function can be enabled only when measures are specified for the x-axis and y-axis.

• In the Series Settings section, configure Display Name and Number Formatting for each measure. When Number Formatting is set to Customer, configure the data format (Number or Percentage) and the number of decimal places.

The following figure shows an updated scatter chart.



Delete a chart

Perform the following steps to delete a chart:

- 1. Click the icon in the upper-right corner of a chart.
- 2. Select Delete.

2.3.18. Decomposition trees

Decomposition trees visualize the percentage of each part to the total in multiple dimensions. You can use a decomposition tree to split the values of a measure into multiple groups based on dimensions and view the data in each dimension. The data in each dimension is automatically sorted. This topic introduces decomposition trees, including an overview and an application example. This topic also describes how to configure the style of a decomposition tree and how to delete a decomposition tree.

Prerequisites

- A dashboard is created. For more information, see Dashboard overview and Create a dashboard.
- A dataset is created and edited based on your business requirements. For more information, see Create a dataset.

Overview

Decomposition trees can be used in many scenarios, such as channel analysis and contribution analysis. You can use a decomposition tree to analyze a measure and identify the key factors that affect the measure.

A decomposition tree consists of an analysis object and splitting bases. The analysis object is determined by a measure, such as the sales volume or order quantity. Splitting bases are determined by dimensions, such as area, province, city, and product name.

Notice You can specify only one measure for the analysis object. You can specify one to five dimensions for the splitting bases.

A decomposition tree can visualize data in up to 5 columns and 50 rows.

Application example

The following example describes how to use a decomposition tree. The *company_sales_record* dataset is used in the example.

- 1. Log on to the Quick BI console.
- 2. Click the Workspace tab. In the left-side navigation pane, click Datasets.
- 3. On the **Datasets** page, find the *company_sales_record* dataset and click the mi icon in the Actions

column.

? Note If you are using Quick BI Enterprise Standard, select Standard or Full Screen as the dashboard type. In this example, Standard is selected.

4. On the dashboard edit page, click the 🔤 icon.

A decomposition tree appears in the dashboard display section.

| Decomposition Tree-company_sales_record | : |
|--|---|
| Money 90,356 Money 234,333 Money 234,333 Money 32,356 Money 32,356 Money 32,356 Money -7,3,435 Money 122,356 Money 122,356 Money 122,356 Money 122,356 Money -1,345 | Money 134,333 Money 122,356 Money -1,345 |

- 5. On the Data tab, select the required measure and dimensions.
 - In the Dimensions list, find area, province, and product_type, and add them to the **Decomposition Basis (Dim.)** field.
 - In the Measures list, find order_amt and add it to the Analysis Object (Mea.) field.



Once Make sure that you have converted the data type of area and province from String to Geo. For information about how to change the data type of a dimension, see Change field types.

- 6. Click **Update**. The chart is updated.
- 7. Specify the dimensions to split the values of the measure.
 - i. In the decomposition tree, click the 💿 icon next to the measure.

| order_amt | High Contribution Low Contribution |
|-----------|------------------------------------|
| O 30.3M | area |
| | province |
| | product_type |

- ii. Select a split method.
 - Custom splitting: The options for custom splitting are dimensions that you added to the Decomposition Basis (Dim.) field. You can determine the dimension by which you want to split data first based on your business requirements. In this example, the values of the measure are split by area, province, and product_type in sequence.

The following figure shows custom splitting.

| Decomposition Tree-company_ | sales_record | |
|-----------------------------|-------------------|---|
| | area | 0 |
| | ~ | |
| | South 817K | 0 |
| | East 520K | 0 |
| order_amt 2.98M | Northeast 500K | • |
| | Center 490K | • |
| | \sim | |

• Smart splitting: The supported options are **High Contribution** and **Low Contribution**. They are artificial intelligence (AI) options. Data is split based on the selected option.



The following figure shows smart splitting.

(?) Note If you use smart splitting and save the dashboard, the splitting path, for example, product_type > province, is also saved. After you close the dashboard and open it again, the splitting path of the decomposition tree is still product_type > province. You can continue to edit the decomposition tree as required.

iii. Change a dimension.

In this example, change **province** used for smart splitting to **product_type** used for custom splitting.

a. Click the 💿 icon next to province.



b. Move the pointer over the plus sign next to the required area and select product_type.



If you want to hide a dimension, click the 🌞 icon next to its parent node. If you want to show

the dimension, click the 🍬 icon again.

- 8. On the **Style** tab, configure the style of the decomposition tree. For more information, see Configure the parameters on the Style tab.
- 9. On the Advanced tab, configure the parameters in the Advanced Settings section.

| Advanced Settings | | |
|-----------------------------------|--------------------|--|
| Auto Refresh 5 Filter Interaction | Minutes 🗸 | / |
| Section | Parameter | Description |
| | Auto Refresh | You can select this option and set the refresh interval. If you set this parameter to 5 Minutes, the system refreshes the chart every 5 minutes. |
| Advanced Settings | Filter Interaction | After you associate multiple charts by using this feature, if you click an area or field in a chart, associated charts in the same dashboard change as expected. For more information, see Configure the filter interaction feature. |

10. Click **Save** in the upper-right corner of the page. In the Save Dashboard dialog box, specify the name and save path for the dashboard, and click OK.

Configure the parameters on the Style tab

• In the Basic Information section, configure Show Title and Description and Show Link.

| Parameter | Description |
|----------------------------|--|
| Show Title and Description | Title: You can customize the title of a chart. We recommend that you name the chart in the format of <i>Chart type-Chart name</i>. Image: You can set the font color of the title. Description: You can enter a description for the title. |
| Show Link | If you want users to be redirected to a report or an external page, select Show Link and specify Link Text and Link Address. |

• In the Chart Type section, configure the style of the decomposition tree.



| Parameter | Description |
|-----------------|---|
| Color Logic | Specifies colors for the values of the measure that you added to the Analysis Object (Mea.) field. Positive Color: the color of positive values for the measure. Negative color: the color of negative values for the measure. |
| Splitting Logic | Specifies the method of using ring charts to show the percentages of different values. Supported options include Parent, Root, and Max. Parent: A node that has child nodes is a parent node. If you select this option, the ring chart of a node shows the percentage calculated based on the value of its parent node. |
| | • Root : A node that does not have a parent node is a root node. If you select this option, the ring chart of a node shows the percentage calculated based on the value of the root node. In this example, the root node is order_amt. |
| | • Max : The node that is ranked first in each column is a max node. If you select this option, the ring chart of a node shows the percentage calculated based on the value of its max node. |

• In the Functionality section, determine whether to select Enable AI Splitting based on your business requirements.

If you select Enable AI Splitting, **Absolute Analysis** is also selected. The following figure shows the decomposition tree after you select Enable AI Splitting.



Onte After Absolute Analysis is selected, absolute values are analyzed.

- In this example, the values of **order_amt** are split by province (Yunnan, Tibet, and Guizhou) and product_type (Technique, Furniture, and Office).
- If you select **High Contribution**, the values are split by **product_type**. You can identify the type of product with the largest order quantity. In this example, technical products have the largest order quantity.
- If you select Low Contribution, the values are split by province. You can identify the province with the smallest order quantity. In this example, Guangdong has the smallest order quantity.

• In the Series Settings section, configure the parameters described in the following table.

| Parameter | Description |
|-------------------|---|
| Series | Select a dimension that you added to the Decomposition Basis (Dim.) field or the measure that you added to the Analysis Object (Mea.) field. In this example, select order_amt . |
| Display Name | The name of the selected measure or dimension displayed in the decomposition tree. |
| Number Formatting | The display format of numbers. The following options are supported: Adaptive, Custom, and Manual Input. In this example: Select Custom. Select % Show Percentage. Set Decimal Place to 2. Select Use Thousands Separator. |

The following figure shows an updated decomposition tree.



Delete a chart

To delete a chart, perform the following steps:

- 1. Click the icon in the upper-right corner of the chart.
- 2. Select Delete.

2.3.19. Funnel chart

This topic introduces funnel charts, including an overview and an application example. This topic also describes how to configure the style of a funnel chart and how to delete a funnel chart.

funnel chart chart making on a dashboard

Prerequisites

- You have logged on to the Quick BI console.
- You are familiar with operations on dashboards. For more information, see Dashboard overview and Basic dashboard operations.
- A dataset is created and edited based on your business requirements. For more information, see Create a dataset.

Overview

A funnel chart is best suited to analyze standard, long-term, multi-stage business processes. It allows you to compare business data from different stages and identify issues. You can also use a funnel chart to show the conversion rate at each stage of a business process, for example, the percentage of visitors that become paying customers for a shopping website.

A funnel chart consists of funnel layering and tier areas. Funnel layering is determined by a dimension, such as area. Tier areas are determined by a measure, such as order price.

Notice You must specify one dimension for funnel layering and one measure for tier areas. Otherwise, you do not need to specify any dimension for funnel layering but must specify one to ten measures for tier areas.

Application example

Scenario: Compare the order prices of multiple regions or compare the order prices, profits, and shipping costs of multiple regions. The following example uses the *company_sales_record* dataset to describe the application of a funnel chart.

- 1. In the left-side navigation pane of the Workspace page, click **Datasets**.
- 2. On the Datasets page that appears, find the *company_sales_record* dataset, and click the at icon in the Actions column.

? Note If you are using Quick BI Enterprise Standard, select Standard or Full Screen as the dashboard type. In this example, Standard is selected.

- 3. Click the right icon. A funnel chart appears in the display area of the dashboard.
- 4. Click the Data tab and select the required dimension and measures.
 - If you want to compare order prices of different regions, find area in the Dimensions list and add

it to the Funnel layering / dimension field, then find **order_amt** in the Measures list and add it to the Tier Area (Mea.) field.



 If you want to compare order prices, profits, and shipping costs of different regions, find order_amt, profit_amt, and shipping_cost in the Measures list and add them to the Tier Area (Mea.) field in sequence.

| Tier Area (Mea.) | 3/10 |
|-----------------------------|-------|
| Nº order_amt(SUM) | |
| № profit_amt(SUM) | |
| Nº shipping_cost(SUM) | |
| Funnel layering / dimension | 0/1 |
| Double-click or drag-and-dr | op to |

- 5. Click **Update**. The chart is updated.
- 6. Click the **Style** tab and configure parameters in the Basic Information, Chart Type, and Series Settings sections.
- 7. Click **Save** in the upper-right corner. In the Save Dashboard dialog box that appears, enter a name for the dashboard and click OK.

Configure parameters on the Style tab

• In the Basic Information section, configure Show Title and Description, Show Link, and Visual Style.

(?) Note If you want the user to be redirected to a report or an external page, select Show Link and specify Link Text and Link Address.

You can set Visual Style to Standard or Conversion Analysis.



• Chart Type

• If Visual Style is set to Standard, you can configure the following parameters in the Chart Type section: Shape, Display Category Labels, Display Data Labels, Conversion Rate Calculation Method, Funnel Color, Data Label Display, Display Mode, Bottom Style, and Show Legend.

| Funnel Chart | | : | Chart Type 🔿 |
|---------------|--|---|--|
| | ■ order_number ■ profit_amt ■ shipping_cost | | Shape |
| order_number | profit_amt value 319K Percentage of pr 0.01% | | |
| profit_amt | Percentage of prime 0.01% | | Trapezoid Rectangle |
| | | | Left of Chart Right of Chart |
| shipping_cost | 6.45% | | 🗸 Display Data Labels |
| | I | | Conversion Rate Measure Value Both |
| | | | Conversion Rate Calculation Method |
| | | | Percentage Out of Upper Stage Percentage Out of Top Stage |
| | | | Funnel Color |
| | | | Color Business |
| | | | Data Label Display |
| | | | 🗿 Smart Display 🔷 Full Display |
| | | | Display Mode |
| | | | Real Smooth |
| | | | Bottom Style |
| | | | Flat Triangle Tip |
| | | | Show Legend |
| | | | |

? Note The conversion rate is calculated by using the following formulas:

- Conversion rate from the upper adjacent layer = Measure value at the current layer/Measure value at the upper adjacent layer × 100%
- Conversion rate from the first layer = Measure value at the current layer/Measure value at the first layer × 100%

Quick BI

• If Visual Style is set to Conversion Analysis, you can specify Shape, Funnel Color, and Data Label Display in the Chart Type section.



• In the Series Settings section, specify Display Name and Number Formatting for each measure.



The following figure shows an updated funnel chart.



Delete a chart

Click the **More Actions** icon in the upper-right corner of a chart and select **Delete** from the dropdown list to delete the chart.

2.3.20. Kanbans

This topic introduces kanbans, including an overview and an application example. This topic also describes how to configure the style of a kanban and how to delete a kanban.

Prerequisites

- A dashboard is created. For more information, see Dashboard overview and Create a dashboard.
- A dataset is created and edited based on your business requirements. For more information, see Create a dataset.

Overview

A kanban provides an overview of data such as sales performance. Kanbans allow you to rapidly respond to sales status and management situations. Kanbans help you identify and troubleshoot issues.

A kanban consists of metrics and labels. Labels are determined by a dimension, such as area. Metrics are determined by measures, such as order quantity and order price.

Notice You can specify only one dimension for labels and one to ten measures for metrics.

Application example

The following example describes how to use a kanban. The *company_sales_record* dataset is used in the example.

- 1. Log on to the Quick BI console.
- 2. Click the Workspace tab. In the left-side navigation pane, click Datasets.
- 3. On the **Datasets** page, find the *company_sales_record* dataset and click the in icon in the Actions column.

(?) Note If you are using Quick BI Enterprise Standard, select Standard or Full Screen as the dashboard type. In this example, Standard is selected.

4. On the dashboard edit page, click the 🔤 icon.

A kanban appears in the dashboard display section.



- 5. On the Data tab, select the required dimension and measures.
 - In the Dimensions list, find province and add it to the Labels (Dim.) field.
 - In the Measures list, find order_number, order_amt, shipping_cost, and profit_amt, and add them to the Metrics (Mea.) field.

| Metrics (Mea.) | 4 / 10 |
|-----------------------|--------|
| No order_number(SUM) | |
| No order_amt(SUM) | |
| *** profit_amt(SUM) | |
| ** shipping_cost(SUM) | |
| Labels (Dim.) | 1/1 |
| Str. province | |

Note Make sure that you have converted the data type of the province dimension from String to Geo. For information about how to change the data type of a dimension, see Edit a GEO dimension.

The first measure under **Metrics (Mea.)** is the primary metric. You can drag and drop the measures under **Metrics (Mea.)** to change the primary metric.

6. Click **Update**. The chart is updated.

| | | E | Data | S |
|-------------------------------------|-------------------------------------|-------------------------------------|-----------------------|------|
| Anhui order_number | Beijing order_number | Fujian order_number | Metrics (Mea.) | 4/10 |
| 1.66K | 1.16K | 603 | Nº order_number(SUM) | |
| order_amt 93.2K profit_amt 11.7K | order_amt 85.3K profit_amt 18.1K | order_amt 57.5K profit_amt 12.9K | Nº order_amt(SUM) | |
| shipping_cost 664 | shipping_cost 599 | shipping_cost 219 | № profit_amt(SUM) | |
| Gansu order_number | Guangdong order_number | Guangxi order_number | Nº shipping_cost(SUM) | |
| 1.25K | 5.82K | 2.71K | Labels (Dim.) | 1/1 |
| order_amt 89.5K profit_amt 6.49K | order_amt 443K profit_amt 57.2K | order_amt 176K profit_amt 17.3K | Str. province | |
| shipping_cost 777 | shipping_cost 2.79K | shipping_cost 1.35K | | |

- 7. On the **Style** tab, configure the style of the chart. For more information, see **Configure** parameters on the Style tab.
- 8. On the Advanced tab, configure parameters in the Advanced Settings section.

| Data | Style | Advanced | |
|--------------------|-----------------|---------------|---|
| dvanced Settings A | | | |
| Auto Refresh 5 | | ✓ | |
| Filter Interaction | | / | |
| Hyperlink | | / | |
| Section | Parameter | D | escription |
| | Auto Refresh | in | ou can select this option and set the refresh terval. If you set this parameter to 5 Minutes, le system refreshes the chart every 5 minutes |
| | Filter Interact | ai tion as | ter you configure filter interaction, if you clic a area or field in a chart, charts that are sociated with this chart in the same dashboa cordingly change. For more information, see onfigure the filter interaction feature. |
| Advanced Settings | | | |

| Section | Parameter | Description |
|---------|-----------|--|
| | Hyperlink | After you configure the hyperlink, if you click a field in a chart on the dashboard, a report that shows information about this field is displayed. You can select Parameter or External Link for this feature. If you select Parameter, you must configure global variables. For more information, see Configure the hyperlink feature. |

9. Click **Save** in the upper-right corner. In the Save Dashboard dialog box, enter a name for the dashboard, specify the save path, and then click OK.

Configure parameters on the Style tab

• In the Basic Information section, configure Show Title and Description, Show Link, and Custom Background.

| Parameter | Description |
|----------------------------|---|
| Show Title and Description | Title: You can customize the chart title. We recommend that you name the chart in the format of <i>Chart type-Chart name</i>. Image: You can set the font color of the title. Description: You can enter a description for the title. |
| Show Link | If you want users to be redirected to a report or an external page, select Show Link and specify Link Text and Link Address. |
| Custom Background | Light color and dark color are supported. The light color is used by default. |

• In the Indicator Settings section, set the metric block style.

| order_number 1.16K order_amt 85.3K | order_number 603 | order_number | Basic Information V |
|---|--|---|--|
| | 603 | | |
| order_amt 85.3K | | 1.25K | Indicator Settings ~ |
| | order_amt 57.5K | order_amt 89.5K | |
| profit_amt 18.1K shipping cost 599 | profit_amt 12.9K shipping cost 219 | profit_amt 6.49K shipping cost 777 | Maximum Indicators Fact Days |
| | | | Maximum Indicators Each Row 4 |
| order_number | order_number | order_number | ☐ Hide Dimensions |
| 2.71K | 406 | 2.34K | Hide Primary Measure Name |
| order_amt 176K | order_amt 7.82K | order_amt 198K | Font Color for Primary Indicator Value |
| | | | Indicator Block Alignment |
| | | | |
| order_number | order_number | order_number | |
| 1.68K | 2.35K | 3.4K | |
| order_amt 128K | order_amt 186K | order_amt 255K | Indicator Alignment |
| profit_amt 11.4K | profit_amt 14.8K | profit_amt 16.9K | 💿 🚽 Align Left 🕥 🚽 Center |
| | | | |
| | Description | | |
| ors Each | The maximum num | ber of metrics that o | can be displayed in each row. |
| | Guangxi order_number 2.71K order_amt 176K profit_amt 17.3K shipping_cost 1.35K Heilongjiang order_number 1.68K order_amt 128K profit_amt 11.4K | Guangxi order_number 2.71K order_amt 176K profit_amt 17.3K shipping_cost 1.35K Heilongjiang order_number 1.68K order_amt 128K profit_amt 128K profit_amt 128K profit_amt 186K profit_amt 186K profit_amt 186K profit_amt 186K profit_amt 186K | Guargxi order_number Guizhou order_number Hainan order_number 2.71K Order_number 406 order_number 406 order_number 2.34K order_number 0rder_number theilongjiang order_number 0rder_number 1.03K heilongjiang order_number 1.68K order_number 0rder_amt 128K order_amt 16.9K |

| Parameter | Description | |
|---|--|--|
| Hide Dimensions | Specifies whether to show dimensions on the kanban. | |
| Hide Primary Measure Name | Specifies whether to show the name of the primary metric on the kanban. | |
| | The font color for the primary metric. | |
| Font Color for Primary Indicator Value | Note The first measure under Metrics (Mea.) is the primary metric. All other measures are secondary metrics. | |
| Main Font Size | The font for the primary metric. | |
| Sub-Font Size | The font for secondary metrics. | |
| Indicator Block Alignment | The supported positions of the metric blocks. | |
| Indicator Alignment | Supported alignment modes include left alignment and center alignment. | |

• In the Functionality Settings section, configure conditional formatting.



| Parameter | Description |
|-------------------------------|--|
| Series | You can select any measure that has been added to the Metrics (Mea.) field. |
| Enable conditional formatting | Specify tag icons, ranges, and font colors. |

• In the Series Settings section, specify Display Name, Description, Prefix and Suffix for Data Value, and Number Formatting for a measure.

Parameter

Description

| Parameter | Description |
|-------------------------------------|---|
| Series | You can select any measure that has been added to the Metrics (Mea.) field. |
| Display Name | The measure name that is displayed on the kanban. |
| Description | The description of the display name. |
| Prefix and Suffix for Data Value | The prefix and suffix of the metric values. |
| Number Formatting | The display format of numbers. The following options are supported: AutoFit, Custom, and Manual. In this example, Custom is selected, Number is selected, and Decimal is set to 2. |

Delete a chart

Click the **More Actions** icon in the upper-right corner of a chart and select **Delete** from the dropdown list to delete the chart.

2.3.21. Trend indicator charts

This topic introduces trend indicator charts, including an overview and an application example. This topic also describes how to configure the style of a trend indicator chart and how to delete a trend indicator chart.

Prerequisites

- A dashboard is created. For more information, see Dashboard overview and Create a dashboard.
- A dataset is created and edited based on your business requirements. For more information, see Create a dataset.

Overview

A trend indicator chart displays multiple indicators and their changes over a period of time. By default, the latest data record of each indicator is displayed.

Notice You can specify only one date dimension for Date (Dimensions) and must specify at least one measure for Indicator (Measures).

Application example

The following example describes how to use a trend indicator chart. The *company_sales_record* dataset is used in the example.

- 1. Log on to the Quick BI console.
- 2. Click the Workspace tab. In the left-side navigation pane, click Datasets.
- 3. On the **Datasets** page, find the *company_sales_record* dataset and click the in icon in the Actions

column.

? Note If you are using Quick BI Enterprise Standard, select Standard or Full Screen as the dashboard type. In this example, Standard is selected.

4. Click the 🔤 icon. A trend indicator chart appears in the display section of the dashboard.



- 5. On the Data tab, select the required dimension and measures.
 - In the Dimensions list, find report_date(day) and add it to the Date (Dimensions) field.
 - In the Measures list, find order_number, order_amt, shipping_cost, and profit_amt, and add them to the **Indicator (Measures)** field.

| Indicator (Measures) |
|--------------------------|
| Nº order_number(SUM) |
| Nº order_amt(SUM) |
| Nº shipping_cost(SUM) |
| № profit_amt(SUM) |
| |
| Date (Dimensions) (1 / 1 |
| i report_date(day) |

6. Click **Update**. The chart is updated.



- 7. On the **Style** tab, configure the parameters on the Basic Information, Chart Settings, Indicator Settings, Functionality Settings, and Series Settings sections.
- 8. On the **Advanced** tab, configure the parameters in the Advanced Settings and Metric Analysis sections.

Select the measures from the **Select Secondary Indicator** drop-down list, and set the comparison method, displayed content, and symbol theme.



| Section | Parameter | Description |
|-------------------|--------------------|--|
| | Auto Refresh | You can select this option and set the refresh interval. If you set this parameter to 5 Minutes, the system refreshes the chart every 5 minutes. |
| | Filter Interaction | After you associate multiple charts by using this feature, if you click an area or field in a chart, associated charts in the same dashboard change as expected. For more information, see Configure the filter interaction feature. |
| | | |
| | | |
| Advanced Settings | | |

| Section | Parameter | Description | |
|-----------------|--------------------------------|--|--|
| | Display Secondary Indicator | If you select this option, you can select the display mode of the secondary indicator. Filter Interaction Display Secondary Indicator Select Secondary Indicator order_number/order_amt/ Compare Method2/2 Compare (Day to Day) Compare (of Last Week) Compare (of Last Month) Compare (of Last Year) Show Percent Variance Variance Select Symbol Theme Theme Theme | |
| Metric Analysis | Fluctuation Analysis | Fluctuation analysis uses machine learning algorithms to analyze the impact of dimensions on measures. You can view the contribution of dimensions to measure fluctuation and specific changes. For more information. | |

9. Click **Save** in the upper-right corner of the page. In the Save Dashboard dialog box, specify the name and save path for the dashboard, and click OK.

Configure the parameters on the Style tab

• In the Basic Information section, configure Title, Description, and Show Link.

| Parameter | Description |
|----------------------------|--|
| Show Title and Description | Title: You can customize the title of a chart. We recommend that you name the chart in the format of <i>Chart type-Chart name</i>. Image: You can set the font color of the title. Description: You can enter a description for the title. |
| Show Link | If you want users to be redirected to a report or an external page, select Show Link and specify Link Text and Link Address. |

• In the Chart Settings section, select Show Trend by Date and specify the chart type as required.

| Parameter | Description | | |
|-----------------------------------|--|--|--|
| Show Trend by Date | After you select this option, you can select Overall Trend or Detailed Trend . | | |
| Date Duration | The default value is 30 days. | | |
| Select Preview Mode | Two options are supported: Single Choice and Multiple Choice. Single Choice: The trend of only one measure is displayed in the chart. Multiple Choice: The trends of multiple measures are displayed in the chart. | | |
| | ⑦ Note This parameter appears only after you select Overall Trend. | | |
| Layout for Multiple Indicators | Two options are supported: Displayed in One Line and Displayed in Multiple Lines . When you select Displayed in One Line, a slide bar appears for you to view all indicators in one row. When you select Displayed in Multiple Lines, indicators are displayed in multiple rows. | | |
| | Note This parameter appears only after you select Overall Trend . | | |
| | Two options are supported: Bottom and Right. | | |
| Detailed Trend Position | Note This parameter appears only after you select Detailed Trend . | | |
| | | | |

• In the Indicator Settings section, set Maximum Indicators Each Row.

| naximum number of indicators that can be displayed in each s example, Maximum Indicators Each Row is set to 4. |
|--|
| ont color for the primary indicator. |
| Note In the Indicator (Measures) field, the first basure is the primary indicator. The rest indicators are condary indicators. |
| |

| Parameter | Description | | | |
|---------------------------|---|--|--|--|
| Indicator Block Alignment | The following figure shows the positions of primary and secondary indicators in indicator blocks. | | | |
| Indicator Alignment | Two options are supported: Align Left and Center. | | | |

• In the **Functionality Settings** section, enable an indicator filter and configure conditional formatting as required.

After you select **Enable Indicator Filter**, an indicator filter icon is displayed in the upper-right corner of the chart. You can click the icon and select the indicators that you want to display.



i. Select the required measure from the Series drop-down list, select **Enable Conditional Formatting**, and then select an icon theme from the **Mark Icon** drop-down list.



- ii. Specify the rules for marking data, the icon style, and font color.
- In the Series Settings section, configure Display Name, Description, Prefix and Suffix for Indicator, and Data Display Format for a measure.

| Parameter | Description | |
|------------------------------------|--|--|
| Series Name | Select a measure that you added to the Indicator (Measures) field. | |
| Display Name | The measure name that is displayed on the trend indicator chart. | |
| Description | The description of the displayed name. | |
| Prefix and Suffix for Indicator | The prefix and suffix of indicator values. | |
| Data Display Format | The display format of numbers. The following options are supported: AutoFit, Custom, and Manual. | |

Y order number order amt shipping cost profit amt 330 6334 150 -1904Compar... -21.80% 🔶 Compar... -83.22% 🔶 Compar... -32.43% 🔶 Compar... -122.71% 🔶 Compar... 200.00% 🛧 Compar... -37.93% 🖊 Compar... 17.19% 🛧 Compar... 9.05% 🔶 order_number - shipping_cost profit_amt 2万 1万 -1万 -2万 20121204 20121207 20121228 20121201 20121210 20121213 20121216 20121219 20121222 20121225

The following figure shows an updated trend indicator chart.

Delete a chart

To delete a chart, perform the following steps:

- 1. Click the icon in the upper-right corner of the chart.
- 2. Select Delete.

2.3.22. Treemap

This topic describes a treemap, including its overview, application example, and configuration style as well as how to delete a treemap.

Prerequisites

- You have logged on to the Quick BI console.
- You are familiar with operations on dashboards. For more information, see Dashboard overview and Basic dashboard operations.
- For information about how to create a dataset, see Create a dataset.

Overview

A treemap can be used to compare the proportions of metric values of objects.

It displays rectangle labels in different sizes based on a measure. Rectangle labels are determined by a dimension, such as packaging. The size of each rectangle label is determined by a measure, such as shipping cost.

Notice You can specify only one dimension for rectangle labels and only one measure for the rectangle size. The dimension has a maximum of 12 values.

Application example

Scenario: Compare the order quantities of different products. The following example uses the *company_sales_record* dataset to describe the application of a treemap.

- 1. In the left-side navigation pane of the Workspace page, click **Datasets**.
- 2. On the Datasets page that appears, find the *company_sales_record* dataset and click in the Actions column.

? Note If you are using Quick BI Enterprise Standard, choose Standard or Full Screen as the dashboard type. The following example uses Standard as the dashboard type.

3. Click 🔜. A treemap appears in the display area of the dashboard.



4. Click the Data tab and select the required measures and dimension.

In the Dimensions list, find and add product_type to the Labels (Dim.) field. In the Measures list, find and add order_number to the Size (Mea.) field, as shown in the following figure.



- 5. Click **Update**. The chart is updated.
- 6. Click the Style tab and change the basic information and series settings of the chart.
- 7. Click **Save** in the upper-right corner. In the Save Dashboard dialog box that appears, enter a name for the dashboard and click OK.

Configure parameters on the Style tab

• In the Basic Information section, set Show Title and Description and Show Link.

Onte If you want to redirect to a report or an external page, select Show Link and specify Link Text and Link Address.

• In the Series Settings section, specify Number Formatting.

Click Update. The following figure shows the updated chart.

| | | D | ata | Style | Advanced |
|-------------------------|---|------------|------------------------------|------------|----------|
| Treemap | ÷ | Basic Info | rmation \vee | | |
| Furniture | | Series Set | tings ^ | | |
| Office | | Series | order_nu | ımber | |
| Office 22,669.00 | | Numb | er Formatting) AutoFit (| | nual |
| | | | Number | Percentage | |
| | | De | ecimal 2 | | |
| | | ~ | Thousand s | eparator | |

Delete a chart

Perform the following steps to delete a chart:

- 1. Click the icon in the upper-right corner of a chart.
- 2. Select Delete.

2.3.23. Polar diagrams

This topic describes the overview, examples, and deletion of a polar diagram.

Make sure that you have read Dashboard overview and Dashboard basic operations before this topic. For more information about how to create a dataset, see Create a dataset.

Overview

A polar diagram compares multiple data values. It is used for comparing enumerated data, such as data based on multiple regions.

Similar to a pie chart, a polar diagram consists of slices. Labels of slices are determined by the dimension, such as the area and product type. Arc radiuses are determined by the measure, such as order numbers and order amounts.

Samples



Notes

You can select a maximum of one dimension for labels. The minimum number of dimension values is three. The maximum number of dimension values is 12. You can select a maximum of one measure for arc radiuses.

Examples

The following example uses the company_sales_record dataset.

- 1. Log on to the Quick BI console.
- 2. Click Datasets to go to the Datasets page.
- 3. Select the company_sales_record dataset and click Create Dashboard.

Onte If you use Quick BI Enterprise Standard, you need to select Standard or Full Screen as the dashboard display mode. The following example uses Standard.

- 4. Click the Polar Diagram icon and an empty chart appears on the dashboard.
- 5. On the Data tab page, select a dimension and a measure.

In the Dimensions list, locate the **area** field and add it to the Label (Dimensions) section. In the Measures list, locate the **order_number** field and add it to the Arc Radius (Measures) section, as shown in the following figure.

Note Make sure that you have converted the dimension type from String to Geo for the area dimension. For more information, see Change the dimension type.



- 6. Click **Update** and the chart is updated.
- 7. On the **Style** tab page, you can configure the title, layout, legend, measures, and series settings.

| Data | Style | Advanced |
|------------------------|-------|----------|
| Basic Settings \vee | | |
| Layout 🗸 | | |
| Measures ~ | | |
| Series Settings \vee | | |

8. Click **Save** to save the dashboard.

Configure the style

• In the Basic Information section, you can configure the title name, title color, description, hyperlink, and background color. This example uses **Dark** as the background color.

Onte For jumping to a report or an external page, select Show Hyperlink and enter a name and an address.

- In the Layout section, you can configure the legend position, whether to show tooltips, label style, leaders, and radiuses. The example uses **Name**, **Value** (**Percentage**) as the label style and uses **Right** as the legend position.
- In the Measures section, you can configure the data format and the number of decimal places. This example uses 2 as the number of decimal places.
- In the Series Setting section, you can configure aliases for the dimensions and slice colors.

Click Update and the chart is shown as follows.



Delete a chart

Click the **More Actions** icon in the upper-right corner of a chart and select **Delete** from the dropdown list to delete the chart.

2.3.24. Word cloud

This topic introduces word clouds, including an overview and an application example. This topic also describes how to configure the style of a word cloud and how to delete a word cloud.

word cloud dashboard charts

Prerequisites

- You have logged on to the Quick BI console.
- You are familiar with dashboards. For more information, see Dashboard overview and Basic dashboard operations.
- A dataset is created and edited based on your business requirements. For more information, see Create a dataset.

Overview

A word cloud visualizes the frequency of words. It is best suited to create user personas and tags.

A word cloud consists of words of different sizes. Words are determined by a dimension, such as customer name or product name. Word sizes are determined by a measure, such as profit or unit price.

Notice You can specify only one dimension for words and only one measure for word sizes.

Application example

The following example uses the *company_sales_record* dataset to describe the application of a word cloud.

- 1. In the left-side navigation pane of the Workspace page, click **Datasets**.
- 2. On the Datasets page that appears, find the *company_sales_record* dataset, and click the 📊 icon

in the Actions column. If you are using **Quick BI Enterprise Standard**, select **Standard** or **Full Screen** as the dashboard type. In this example, **Standard** is selected.

- 3. Click the display area of the dashboard.
- 4. Click the Data tab and select the required dimension and measure.
 - In the dimensions list, find and add city to the Word (Dim.) field.
 - In the measures list, find and add order_number to the Word Size (Mea.) field.
 - If you want to display a large volume of data in the word cloud, you can specify the Filters field to display specific types of data. For example, you can use the Filters field to specify an order cost range from 10,000 to 50,000. The word cloud then displays only orders whose costs are within this specific range.



- 5. Click **Update**. The chart is updated.
- 6. Click the **Style** tab, and change the chart name, font color, and word cloud shape, and specify whether to show the link.

| Basic Information A |
|--|
| ✓ Show Title and Description |
| Title |
| Word Cloud-company_sales_record_en_0514 |
| • |
| Description |
| Enter a description |
| Show Link |
| Link Text Hyperlink O |
| Link Address https://bi-ap-southeast-1.data.aliy |
| Style Settings A |
| Word Cloud Shape |
| |
| Rectangle Ellipse Triangle Heart |
| Display Text Vertically |
| Series Settings < |
| Series order_number v |
| Display Name order_number |
| Number Formatting |
| • AutoFit Customer Manual |
| AutoFit (English) 🗸 |

7. Click the Advanced tab, and configure Auto Refresh and Filter Interaction.

| | Data | Style | Advanced |
|-------|-----------------|-------|----------|
| Adva | nced Settings ^ | | |
| Aut | o Refresh | | |
| | No Refresh | | ~ |
| Filte | er Interaction | | |

8. Click **Save** in the upper-right corner. In the Save Dashboard dialog box that appears, enter a name for the dashboard and click OK.

Configure parameters on the Style tab

• In the Basic Information section, configure Show Title and Description and Show Link.

| Parameter | Description |
|----------------------------|---|
| Show Title and Description | Title: You can customize the title of the word cloud. We recommend that you name the chart in the format of <i>Chart type-C hart name</i>. You can set the font color of the title. Description: You can enter a description for the title. |
| Show Link | If you want the user to be redirected to a report or an external page, select Show Link and specify Link Text and Link Address. |

• In the Style Settings section, configure Word Cloud Shape and Display Text Vertically.

| Parameter | Description |
|-------------------------|---|
| Word Cloud Shape | The supported word cloud shapes include: Rectangle Ellipse Triangle Heart |
| Display Text Vertically | The text in the word cloud is displayed horizontally by default. After you select this option, the text is displayed vertically. |

• In the Series Settings section:

• Change the display name of each measure.

| Word Cloud-company_sales_record_en : | | Basic Information \vee |
|--|--|---|
| Linfen : Yingkou Beihai Yanan H Ki Xiangyang Suzhou Yanyang Shanghai Liaoyang Ki Yingkou Beihai Yanan H Ki Yingkou Jingzhou Yanyang Shuangyashan Z Tianjin Sansha Lasa Y Jiayuguan Yangjiang Quzhou Pingdingshan Y Chengzhou Rojijing Angel Pingdingshan Y Cheng Pingdingshan | | Style Settings ∽ Series Settings ∧ |
| Hegang and Jieyang Zhengzhou Bejjing Haikou Siping San and San | | Series a order_number V |
| Hegang is to young Entrigence Del Jing Haikou Siping 2 2 3 5 0 5 1 Panjin S Wuhu Taiyuan E Sayannaoer S S S S S S S S S S S S S S S S S S S | | Display Name order_number Number Formatting |
| | | AutoFit Customer Manual |
| | | AutoFit (English) 🗸 |
If Number Formatting is set to Customer, you can specify the display mode of each measure. The supported display modes are Number and Percentage. You can also set the Decimal parameter.

Onte Number Formatting is set to AutoFit by default.

Delete the word cloud

To delete the word cloud, follow these steps:

- 1. Click the 👔 icon in the upper-right corner of the word cloud.
- 2. Select Delete.

2.3.25. Butterfly chart

This topic introduces butterfly charts, including an overview and an application example. This topic also describes how to configure the style of a butterfly chart and how to delete a butterfly chart.

butterfly chart chart making on a dashboard

Prerequisites

- You have logged on to the Quick BI console.
- You are familiar with dashboards. For more information, see Dashboard overview and Basic dashboard operations.
- A dataset is created and edited based on your business requirements. For more information, see Create a dataset.

Overview

A butterfly chart is the combination of a comparison chart and a funnel chart. A comparison chart is used to compare metrics of two different objects, such as the income and education level differences between residents in two cities. A funnel chart shows the conversion rate at each stage of a business process, such as the percentage of visitors that become paying customers for a shopping website. Funnel charts are ideal for business process analysis.

A butterfly chart combines the features of a comparison chart and a funnel chart. If you want to compare the migration rate, employment rate, and commercial housing transactions between Beijing and Shanghai cities, and a conversion relationship exists between these metrics. You can use a butterfly chart to show the values of the metrics for the two cities and also the conversion rates between the metrics.

If no conversion relationship exists, the butterfly chart functions as a comparison chart. If a conversion relationship exists between the metrics but only one comparison object is defined, the chart functions as a funnel chart.

A butterfly chart consists of comparison objects and metrics. The objects that are compared are determined by a dimension, such as area or product type. Metrics are determined by measures, such as order quantity and order price.

Notice You can specify only one dimension for comparison objects and up to ten measures for tier areas.

Application example

Scenario: Compare the order quantities, profits, and shipping costs of different types of products. The following example uses the *company_sales_record* dataset to describe the application of a butterfly chart.

- 1. In the left-side navigation pane of the Workspace page, click Datasets.
- 2. On the Datasets page that appears, find the *company_sales_record* dataset, and click the at icon in the Actions column.

(?) Note If you are using Quick BI Enterprise Standard, select Standard or Full Screen as the dashboard type. In this example, Standard is selected.

- 3. Click the 🐺 icon. A butterfly chart appears in the display area of the dashboard.
- 4. Click the Data tab and select the required dimension and measures. In the Dimensions list, find and add product_type to the Comparison Metrics (Dim.) field. In the Measures list, find and add order_number, profit_amt, and shipping cost to the Tier Area (Mea.) field.



- 5. Click **Update**. The chart is updated.
- 6. Click the **Style** tab and configure parameters in the Basic Information, Visual Style, and Series Settings sections.
- 7. Click **Save** in the upper-right corner. In the Save Dashboard dialog box that appears, enter a name for the dashboard and click OK.

Configure parameters on the Style tab

• In the Basic Information section, configure Show Title and Description, Show Link, and Visual Style.

Once If you want the user to be redirected to a report or an external page, select Show Link and specify Link Text and Link Address.

Butterfly charts have two visual styles: standard and conversion analysis.



- In the Chart Type section, configure the following parameters:
 - When Visual Style is set to Standard, you can configure the following parameters in the Chart Type section: Shape, Display Measure Names, Display Data Labels, Conversion Rate Calculation Method, Funnel Color, Data Label Display, Display Mode, Bottom Style, and Show Legend.

| | | | | Udld | oiyie |
|----------------------------|---------------------------|-------------------|--|--------------------|--|
| Butterfly Chart (Standard) | | | | Chart Type \land | |
| Butterfly Chart (Standard) | | L and L | | Shape | |
| order_number | 100 | % 100% | | | |
| | | | | Trapezoid Re | ectangle |
| profit_amt | 510.22 | % 313.51% | | 🔽 Display Measure | e Names |
| | | | | 🔘 Left of Chai | rt 🔵 Right of Chart |
| shipping_cost | 6.03 | % 38.52% | | 🛃 Display Data La | bels |
| | ■ order_number ■ profit_ | amt shipping_cost | | Conversion Both | Rate OMeasure Value |
| | | | | Conversion Rate Ca | alculation Method |
| | | | | | e Out of Upper Stage e Out of Top Stage |
| | | | | Funnel Color | |
| | | | | Color | Business |
| | | | | Data Label Display | |
| | | | | 💿 Smart Displ | lay 💦 Full Display |
| | | | | Display Mode | |
| | | | | 🔘 Real 🗌 | Smooth |
| | | | | Bottom Style | |
| | | | | 💿 Flat 🗌 | Triangle Tip |
| | | | | Show Legend | |
| | | | | | |

? Note The conversion rate is calculated by using the following formulas:

- Conversion rate from the upper adjacent layer = Measure value at the current layer/Measure value at the upper adjacent layer × 100%
- Conversion rate from the first layer = Measure value at the current layer/Measure value at the first layer × 100%

• When Visual Style is set to Conversion Analysis, you can configure Shape, Funnel Color, and Data Label Display in the Chart Type section.

| Butterfly Char (Conversion Ar | nalysis) | Basic Information $$ |
|-------------------------------|-----------------|---------------------------------------|
| order_number | | order number |
| 164K | | 60.6K Shape |
| profit_amt | 510.22% 313.51% | profit_amt III 🗐 |
| 838K | | 190K Horizontal Vertical |
| | 6.03% 38.52% | Funnel Color |
| shipping_cost 50.5K | | shipping_cost 73.2K Color Business |
| | | Data Label Display |
| | | 🔘 Smart Display 🔷 Full Disp |

• In the Series Settings section, specify Display Name and Number Formatting for each measure.



Click Update. The following figure shows an updated butterfly chart.

| | 100 Mar = | and the second sec | |
|---------------|-----------|--|--------------|
| order_number | | | order_numbe |
| 164,255.00 | | | 60,615.0 |
| | 510.22% | 313.51% | |
| profit_amt | | | profit_am |
| 338K | | | 190 |
| | 6.03% | 38.52% | |
| shipping_cost | | | shipping_cos |
| 50.5K | | | 73.2 |

Click the \equiv icon next to a dimension value to switch to another dimension value.

Delete a chart

Click the **More Actions** icon in the upper-right corner of a chart and select **Delete** from the dropdown list to delete the chart.

2.3.26. Hierarchy charts

> Document Version: 20210117

This topic describes how to create a hierarchy chart. We recommend that you read Dashboard overview and Basic dashboard operations before you create a hierarchy chart. You also can edit or create a dataset. For more information, see Create a dataset.

Overview

A hierarchy chart uses the tree structure to display and organize hierarchical data. It is an implementation of the enumeration method. For example, when you view the revenues of the prefecture-level cities within a province, the relationships between the province and prefecture-level cities can be displayed in parent-child structures. Hierarchy charts are used to analyze organizational structures, such as the staff structure of a company or the department structure of a hospital.

A hierarchy chart consists of node metrics and node labels. Each node label is determined by data dimensions, such as the area and product type. Each node metric is determined by data measures, such as the order quantity and order amount.

Example of a hierarchy chart



Precautions

At least two dimensions must be set for node labels. These two dimensions must have a parent-child relationship. At least one measure must be set for the node metric.

Scenario: Compare the order quantities of different products across provinces and areas

The following scenario is based on the company_sales_record dataset.

- 1. Log on to the Quick BI console.
- 2. On the homepage, click the Workspace tab. In the left-side navigation pane, enter a group workspace name in the text box, or click the triangle next to the text box and select a group workspace from the drop-down list. Click **Datasets** to go to the All Items tab.
- 3. Click the **Create Dashboard** icon in the Actions column corresponding to the company_sales_record dataset.

Onte If you are using Quick BI Enterprise Standard, you must select Standard or Full Screen. The following scenario uses Standard as an example.

4. In the toolbar, click the Hierarchy Chart icon. The blank hierarchy chart is automatically displayed in

the display section.

5. Click the Data tab and select the required measures and dimensions.

In the Dimensions section, double-click **area**, **province**, and **product type**, or drag and drop them to the Node Labels (Dimensions) section in order. This order determines their hierarchical relationships in the chart. In the Measures section, double-click **order number**, or drag and drop it to the Node Metrics (Measures) section, as shown in the following figure.

Note Make sure you have changed the data type of the province field value from String to Geo.

| Data | Sty |
|--------------------|-------------|
| Node Metric (Measu | res) |
| Nº 페 order_numbe | r ⊜X |
| Node Label (Dimens | |
| Node Laber (Dimens | ions) |
| o area | ions) ⊜× |
| | |

- 6. Click **Update**. The system automatically updates the chart.
- 7. On the **Style** tab, you can set Show Title, Layout, and Design.
 - Hierarchy charts support three layouts. You can select the expansion mode (root nodes are merged by default) and display mode of parent and child nodes as needed.



• In the Design section, you can manually enter the number of hierarchy levels displayed in the chart. You can select a primary path from the corresponding drop down list. The primary path is displayed in a different color from other paths. You can load the filter bar to the chart so that you can edit the chart in the preview mode or on the dashboard, as shown in the following figure.

| Design ^ | |
|------------------------|---|
| Levels All Items 2 | |
| Primary Path | |
| None | ~ |
| Sort | |
| | ~ |
| Highlight Primary Path | |
| Highlight Bounce Path | |
| Show Filter Bar | |

8. Click Save to save the dashboard.

Delete a chart

Move the pointer over the upper-right corner of the window. Click the More icon that appears and choose **More Actions > Delete** to delete the current chart.

2.3.27. Flow analysis chart

This topic describes a flow analysis chart, including its overview, application example, and configuration style as well as how to delete a flow analysis chart.

Prerequisites

- You have logged on to the Quick BI console.
- You are familiar with operations on dashboards. For more information, see Dashboard overview and Basic dashboard operations.
- For information about how to create a dataset, see Create a dataset.

Overview

A flow analysis chart illustrates the conversion rate of a web page by comparing the source, center, and goal traffic for a web page.

A flow analysis chart supports these three-level dimensions, center nodes, node types, and node names. The measures of a flow analysis chart include node metrics.

- You can specify only one dimension for the center node, node name, and node type, respectively. The dimension fields must be hierarchical. You must set the node type field to **source**, **center**, or **goal**. The three dimension values correspond to the source traffic node, the center traffic node, and the traffic goal node. You can specify only one measure for each node metric. The source traffic data is the metric of the center node with its node type set to source. The traffic goal data is the metric of the center node type set to goal. The conversion rate of a web page equals the ratio of the metric value of the source traffic data to the metric value of the center node.
- For more information about the examples of a flow analysis chart, see Flow Analysis-demo table.

(?) Note Data for node types other than source, center, and goal are filtered out. When the node name is left blank: If the node type is source, the value of the node name is unknown source. If the node type is goal, the value of the node name is unknown goal.

Application example of a flow analysis chart

Quick BI

The following example uses the *page_source_target_state* dataset to describe the application of a flow analysis chart.

- 1. In the left-side navigation pane of the Workspace page, click **Datasets** to go to the Datasets page.
- 2. Find the *page_source_target_state* dataset and click the int icon in the Actions column

corresponding to the dataset.

(?) Note If you use Quick BI Standard, you need to select Standard or Full Screen in the dialog box that appears in the dashboard display mode. The following example uses Standard as the display mode.

3. Click the **iss** icon. A flow analysis chart appears in the display area of the dashboard.



4. On the Data tab page, select the required measures and dimensions.

In the Dimensions list, find and add center node, node type, and node name to the corresponding fields. In the Measures list, find and add node metrics to the corresponding fields. The following figure shows an example.

- 5. Click Update. The system updates the chart.
- 6. On the **Style** tab page, set Show Title and Layout.

| Graphic Design | 💽 Change Chart Type 🕶 | | |
|------------------------|-----------------------|----------|--|
| Data | Style | Advanced | |
| Basic Information ee | | | |
| Series Settings ee | | | |

7. Click **Save** to save the dashboard.

Configure settings on the Style tab

1. In the Basic Information section, configure Title, Description, Show Link, and Custom background.

? Note

- This example uses Dark as the background.
- If you want to redirect to a report or an external page, select Show Link and specify Link Text and Link Address.
- 2. In the Series Settings section, set Alias and Data Display Format for a measure.

Delete a chart

Perform the following steps to delete a chart:

1. Click the icon in the upper-right corner of a chart.

2. Select Delete.

2.3.28. LBS heat maps

This topic describes the overview, examples, and deletion of an LBS heat map.

Onte LBS heat maps only apply to Quick BI Enterprise Standard.

Make sure that you have read Dashboard overview and Dashboard basic operations before reading this topic. For more information about how to create a dataset, see Create a dataset.

Overview

Similar to a colored map, an LBS heat map represents the size and distribution of data by using different shades of location dots.

An LBS heat map is based on geographic locations and heat intensity. Geographic locations are determined by Geo type dimensions such as the province. Heat intensity is determined by measures such as the order amount and profit amount.

Samples



Notes

You can only select one dimension for the geographical locations and the dimension type must be Geo. You can select a minimum of one and a maximum of five measures for the heat intensity.

For more information, see Detailed information for regions.

Examples

The following example uses the company_sales_record dataset.

- 1. Log on to the Quick BI console.
- 2. Click Datasets to go to the Datasets page.
- 3. Select the company_sales_record dataset and click the Create Dashboard icon.

Onte If you use Quick BI Enterprise Standard, you need to select Standard or Full Screen as the dashboard display mode. The following example uses the Standard display mode.

- 4. Click the LBS Heat Map icon and an empty chart appears.
- 5. On the **Data** tab page, select a dimension and measures.

On the Dimensions list, locate the **province** field and add it to the Geo Location section. On the Measures list, locate the **order_number** and **shipping cost** fields and add them to the Heat Intensity (Measures) section respectively.

? Note Make sure that you have converted the dimension type from String to Geo for the province dimension. For more information, see Change the dimension type.

- 6. Click **Update** and the chart is updated.
- 7. On the **Style** tab page, you can configure the title, layout, and measures' aliases.

| Data | Style | Advanced |
|-----------------------------|-------|----------|
| General config 🗸 | | |
| Layout 🗸 | | |
| Series setting \checkmark | | |

8. Click Save to save the dashboard.

Configure the style

• In the Basic Information section, you can configure the title, hyperlink, and background color. This example uses Dark as the background color.

Note To configure a hyperlink used to jump to a report or an external page, select Show Hyperlink and enter a name and address.

- In the Layout section, you can configure the legend position, base map, zoom setting, and map center. This example uses Google Map as the base map.
- In the Series Settings section, you can configure measures' aliases and legend colors.

Click Update and the chart is updated.

LBS Heat Map-company_sales_record_en_0423



Delete a chart

In the upper-right corner of the chart, choose More Actions > Delete to delete the chart.

2.3.29. LBS bubble maps

This topic describes the overview, examples, and deletion of an LBS bubble map.

? Note LBS bubble maps only apply to Quick BI Enterprise Standard.

Make sure that you have read Dashboard overview and Dashboard basic operations before reading this topic. For more information about how to create a dataset, see Create a dataset.

Overview

Similar to a bubble map, an LBS bubble map is a map that uses the sizes of bubbles distributed across the map to reflect data. It provides multiple base maps for you to choose from, such as AMAP, Google Maps, and GeoQ. LBS bubble maps allow you to understand the distribution and values of metrics across countries and regions in an easy and visual way. For example, LBS bubble maps can display the passenger numbers across tourist attractions or the per capita incomes across regions.

An LBS bubble map is based on bubble sizes and geographical locations. Geographical locations are determined by Geo type dimensions such as the province. Bubble sizes are determined by measures such as the shipping cost and order number.

Samples



Notes

You can only select one dimension for the geographical locations and the dimension type must be Geo. For example, the area, province, and city fields. You can select a minimum of one and a maximum of five measures for bubble sizes.

For more information, see Detailed information for regions.

Examples

The following example uses the company_sales_record dataset.

- 1. Log on to the Quick BI console.
- 2. Click Datasets to go to the Datasets page.
- 3. Select the company_sales_record dataset and click Create Dashboard.

Once If you use Quick BI Enterprise Standard, you need to select Standard or Full Screen as the dashboard display mode. The following example uses the Standard display mode.

- 4. Click the LBS Bubble Map icon and an empty chart appears.
- 5. On the Data tab page, select dimensions and measures.

On the Dimensions list, locate the **province** field to the Geo Location section. On the Measures list, locate the **order_amt** and **profit_amt** fields and add them to the Bubble Size (Measures) section respectively.





- 6. Click **Update** and the chart is updated.
- 7. On the **Style** tab page, you can configure the title, layout, and data display formats.

| Data | Style | Advanced |
|-----------------------------|-------|----------|
| General config 🗸 | | |
| Layout 🗸 | | |
| Series setting \checkmark | | |

8. Click **Save** to save the dashboard.

In the upper-right corner of the chart, choose **More Actions > Delete** to delete the chart.

Configure the style

• In the Basic Information section, you can configure the title, hyperlink, and background color. This example uses Dark as the background color.

Note To configure a hyperlink used to jump to a report or an external page, select Show
 Hyperlink and enter a name and address.

- In the Layout section, you can configure the legend position, base map, zoom settings, and map center. This example uses Google Map as the base map.
- In the Series Settings section, you can configure the measures' aliases, data display formats, and numbers of decimal places.

Click Update and the chart is updated.

LBS Bubble Map-company_sales_record_en_0423



Delete a chart

In the upper-right corner of the chart, choose More Actions > Delete to delete the chart.

2.3.30. LBS flying line maps

This topic describes the overview, examples, and deletion of an LBS flying line map.

Only Quick BI Enterprise Standard supports LBS flying line maps.

Make sure that you have read Dashboard overview and Dashboard basic operations before reading this topic. For more information about how to create a dataset, see Create a dataset.

An LBS flying line map is a map that uses flying lines to display the relations between data across two or more locations.

An LBS flying line map consists of geographic locations and routes. Geographic locations are based on dimensions such as the province. Color scales are based on measures such as the order amount and order number.

Overview

An LBS flying line map is a map that uses flying lines to display the relations between data across two or more locations.

An LBS flying line map consists of geographic locations and routes. Geographic locations are based on dimensions such as the province. Color scales are based on measures such as the order amount and order number.

Samples

> Document Version: 20210117

LBS Flying Line Map-company_sales_record_en_0423



Notes

You can only select one dimension for each geographic location and the dimensions must be Geo type fields such as the area, province, and city. You can select a maximum of one measure for the routes.

For more information, see Detailed information for regions.

Examples

The following example uses the company_sales_record dataset.

- 1. Log on to the Quick BI console.
- 2. Click Datasets to go to the Datasets page.
- 3. Select the company_sales_record dataset and click Create Dashboard.

Onte If you use Quick BI Enterprise Standard, you need to select Standard or Full Screen as the dashboard display mode. The following example uses the Standard display mode.

- 4. Click the LBS Flying Line Map icon and an empty chart appears on the dashboard.
- 5. On the **Data** tab page, select dimensions and a measure.

On the Dimensions list, locate the **area** field and add it to the Geo Location (From) section. Locate the **province** field and add it to the Geo Location (To) section. On the Measures list, locate the **shipping_cost** field and add it to the Routes (Measures) section as shown in the following figure.

Note Make sure that you have converted the dimension type from String to Geo for the province and area fields. For more information, see Change the dimension type.



- 6. Click **Update** and the chart is updated.
- 7. On the **Style** tab page, you can configure the title, layout, and series setting as shown in the following figure.

| Data | Style | Advanced |
|-----------------------------|-------|----------|
| General config 🗸 | | |
| Layout 🗸 | | |
| Series setting \checkmark | | |

8. Click Save to save the dashboard.

In the upper-right corner of the chart, choose **More Actions > Delete** to delete the chart.

Configure the style

- In the Basic Information section, you can configure the title, hyperlink, and background color. This example uses Dark as the background color.
- In the Layout section, you can configure the legend position, base map, zoom settings, and map center. This example uses Google Map as the base map.

? Note You can adjust the flying speed by moving the Flying Time slider. The bigger the slider value, the lower the flying speed.

• In the Series Setting section, you can configure the measure's alias and line color.

Click Update and the chart is updated.

LBS Flying Line Map-company_sales_record_en_0423



Delete a chart

In the upper-right corner of the chart, choose More Actions > Delete to delete the chart.

2.3.31. Progress bar

This topic introduces progress bars, including an overview and an application example. This topic also describes how to configure the style of a progress bar and how to delete a progress bar.

Prerequisites

- You have logged on to the Quick BI console.
- You are familiar with dashboards. For more information, see Dashboard overview and Basic dashboard operations.
- A dataset is created and edited based on your business requirements. For more information, see Create a dataset.

Overview

A progress bar displays the progress of a task.

A progress bar consists of multiple progress pointers. Pointers are determined by measures, such as order quantity.

♥ Notice

- You can specify up to five measures for the pointers.
- Before you use a progress bar, you must specify target values in the **Functionality** section on the **Style** tab.

Application example

Scenario: Use a progress bar to display the order quantity. The following example uses the *company_sales_record* dataset to describe the application of a progress bar.

- 1. In the left-side navigation pane of the Workspace page, click **Datasets**.
- 2. On the Datasets page that appears, find the *company_sales_record* dataset, and click the at icon in the Actions column.

? Note If you are using Quick BI Enterprise Standard, select Standard or Full Screen as the dashboard type. In this example, Standard is selected.

- 3. Click the **m** icon. A progress bar appears in the display area of the dashboard.
- 4. Click the **Data** tab and select the required measures.

In the Measures list, find and add order_number to the Pointer (Mea.) field.

| Data Source Type: | |
|--------------------------|-------|
| Pointer (Mea.) | 1/5 |
| NO order_number(SUM |) |
| Filters | |
| Double-click or drad-and | d-dro |

- 5. Click **Update**. The chart is updated.
- 6. Click the **Style** tab and configure parameters in the Basic Information, Functionality, Style Settings, and Series Settings sections.
- 7. Click **Save** in the upper-right corner. In the Save Dashboard dialog box that appears, enter a name for the dashboard and click OK.

Configure parameters on the Style tab

• In the **Basic Information** section, configure Show Title and Description, Show Link, and Visual Style. Quick BI supports three styles: Bar, Ring, Liquid Fill.



• In the Functionality section, set target values. You can specify fixed or dynamic target values. The dynamic values are calculated by using aggregate functions.

| Progress Bar-company_sales_record_en_0514 | | Basic Information V | - Cigilo | AMANUNCCA |
|---|--------------------|---------------------------------|----------------|--------------|
| | | Functionality < | | |
| order_number 58.07% | profit_amt 100.00% | Set Target Value Indicator | Target Type | Target Value |
| | | order_number | Fixed Value $$ | 71556 |
| shipping cost | | profit_amt | Dynamic v | orofit_amt ∨ |
| 22.71% | | | | Sum 🗸 |
| | | shipping_cost | Fixed Value $$ | 90566.549999 |
| | | Decimal Places 2 | | |
| | | Style Settings \smallsetminus | | |
| | | Series Settings 🗸 | | |

• In the Style Settings section, specify the number of progress bars displayed in each row, the display mode of the current or target value, and colors for the progress bars.

| | | | | Udld | Style | Auvanceu |
|-----------------------------------|----------------|---------------------------------|---------|----------------------|-------------------------|-----------|
| Progress Bar-company_sales_re | cord_en_0514 | | | Basic Information | | |
| | | | | Functionality \sim | | |
| order_number | 58.07 % | profit_amt | 100.00% | Style Settings < | | |
| Actual Value 41.6K / Target 71.6K | 58.07 % | Actual Value 319K / Target 319K | 100.00% | | ues Each Row $2 	imes$ | |
| shipping_cost | | | | Current/Target La | bel Value Display | |
| shipping_cost | 22.71% | | | C Label Valu | ie Only 💿 Label Na | ime+Value |
| Actual Value 20.6K / Target 90.6K | | | | Current Value | Display Name Actual | Value |
| | | | | Target Value- | Display Name Target | |
| | | | | Color | Business | |
| | | | | | ieldColor tem system | usiness 🗸 |
| | | | | | order_number | |
| | | | | Series ord | profit_amt | |
| | | | | | shipping_cost | custom 📃 |

• In the Series Settings section, specify Display Name, Description, and Number Formatting for each measure.

| Progress Bar-company_sales_record_en_0514 | | 1 | Basic Information V |
|---|---|---------|--|
| order_number () test 58.07% Actual Value 41,556.00 / Target 71,556.00 | profit_amt Actual Value 319K / Target 319K | 100.00% | Functionality ~ Style Settings ~ Series Settings ^ |
| shipping_cost 22.71 % Actual Value 20.6K / Target 90.6K | | | Series order_number |
| | | | Number Percentage Decimal 2 Y Thousand separator |

Delete the progress bar

Follow these steps to delete a progress bar:

- 1. Click the icon in the upper-right corner of the progress bar.
- 2. Select Delete.

2.3.32. Sankey diagram

This topic describes a Sankey diagram, including its overview, application example, configuration style as well as how to delete a Sankey diagram.

Prerequisites

- You have logged on to the Quick BI console.
- You are familiar with operations on dashboards. For more information, see Dashboard overview and Basic dashboard operations.
- For information about how to create a dataset, see Create a dataset.

Overview

A Sankey diagram is a flow diagram in which the branch width is proportional to the flow rate. It shows the data flow between two groups of values. It is ideal for visualization analysis of energy, material composition, and finance data.

♥ Notice

- For a Sankey diagram, you can specify two to five dimensions for the node category (dimension) axis, such as province and product type. Whereas, you can specify up to one measure for the value axis, such as order quantity.
- Sankey diagrams do not support advanced filter interaction.

Application example of a Sankey diagram

This example uses the *company_sales_record* dataset to describe the flow of order quantities and order levels of different products in different regions.

- 1. In the left-side navigation pane of the Workspace page, click **Datasets** to go to the Datasets page.
- 2. Find the *company_sales_record* dataset, and click the int icon in the Actions column corresponding to the dataset.

Onte If you use Quick BI Enterprise Standard, you need to choose Standard or Full Screen as the dashboard type. The following example uses Standard as the dashboard type.

- 3. Click the 💋 icon. A Sankey diagram appears in the display area of the dashboard.
- 4. In the Dimensions list, find and add the area and order_level fields to Node Type (Dimensions).
- 5. In the Measures list, find and add the order_number field to Node Height (Measures).



- 6. Click **Update**. The system updates the chart.
- 7. On the **Style** tab, configure basic information, chart type, and series settings.
- 8. Click **Save** to save the dashboard.

Configure settings on the Style tab

• In the **Basic Information** section, configure the title, whether to show the link, and background color.

This example uses Light Color (Default) as the background color.

? Note If you want to redirect to a report or an external page, select Show Link and specify Link Text and Link Address.

• In the Chart Type section, set Show Labels and Line Style.



• In the Series Settings section, set Alias and Data Display Format for the measure.

In this example, the default data display format AutoFit is used.

Click Update. The following figure shows an updated chart.

| Sankey Diagram-company_sales_record_new | |
|---|--------------------|
| East China 38.9K | High_level 46.1K |
| | Low_level 45.6K |
| North China 42.1K North East 32.1K | |
| North East 32.1K | Middle_level 83.8K |
| South China 64.2% | Other 43.4K |
| | |
| area | order_level |

Delete a chart

Perform the following steps to delete a chart:

1. Click the icon in the upper-right corner of the chart.

2. Select Delete.

2.3.33. Ranking board

This topic describes a ranking board, including its overview, application example, and configuration style as well as how to delete a ranking board.

Prerequisites

- You have logged on to the Quick BI console.
- You are familiar with operations on dashboards. For more information, see Dashboard overview and Basic dashboard operations.
- For information about how to create a dataset, see Create a dataset.

Overview

A ranking board shows the ranking of the Top N objects in descending order of a specific measure. It objectively reflects the strength of objects of the same category.

🗘 Notice

- By default, the data of 20 rows can be previewed, and a maximum of 50 rows can be displayed.
- For a ranking board, you can specify only one category axis (dimension) such as region or product type and only one measure such as order quantity or profit.

Application example of a ranking board

The following example uses the *company_sales_record* dataset to compare the order quantities in different regions.

- 1. In the left-side navigation pane of the Workspace page, click **Datasets** to go to the Datasets page.
- 2. Find the *company_sales_record* dataset, and click the in icon in the Actions column corresponding to the dataset.

Onte If you use Quick BI Enterprise Standard, you need to choose Standard or Full Screen as the dashboard type. The following example uses Standard as the dashboard type.

- 3. Click the 🔚 icon. A ranking board appears in the display area of the dashboard.
- 4. In the Dimensions list, find and add the area field to Category (Dimensions).



- 5. In the Measures list, find and add the **order_number** field to Indicator (Measures).
- 6. Click **Update**. The system updates the chart.
- 7. On the **Style** tab, configure basic information, chart type, and series settings.
- 8. Click **Save** to save the dashboard.

Configure settings on the Style tab

• In the Basic information section, configure the title, color, and whether to show the link.

(?) Note If you want to redirect to a report or an external page, select Show Link and specify Link Text and Link Address.

- In the **Style Settings** section, set Show Column Name, Theme for Top 3 Items, Data Display Format, Value Alignment, and Bar Color.
- In the Functionality Settings section, set conditional formatting.



- i. Select **Enable conditional formatting**, and select icon themes from the drop-down list of **Tag icon**.
- ii. You can specify the rules for data that you want to mark out, the icon style, and font color.
- In the Series Settings section, set the measure alias, alignment, and data display format.

Click Update. The following figure shows an updated figure.



Delete a chart

Perform the following steps to delete a chart:

- 1. Click the 🚦 icon in the upper-right corner of the chart.
- 2. Select Delete.

2.3.34. Ticker board

This topic describes a ticker board, including its overview, application example, and configuration style as well as how to delete a ticker board.

Prerequisites

- You have logged on to the Quick BI console.
- You are familiar with operations on dashboards. For more information, see Dashboard overview and Basic dashboard operations.
- For information about how to create a dataset, see Create a dataset.

Overview

A ticker board displays core KPI data and allows you to customize style settings such as the background color.

Notice A ticker board can only display indicators (measures).

Application example of a ticker board

The following example uses the *company_sales_record* dataset to describe how to use a ticker board.

- 1. In the left-side navigation pane of the Workspace page, click Datasets.
- 2. Find the *company_sales_record* dataset, and click the int icon in the Actions column corresponding to the dataset.

Onte If you use Quick BI Enterprise Standard, you need to choose Standard or Full Screen as the dashboard type. The following example uses Standard as the dashboard type.

- 3. Click the **1** icon. A ticker board appears in the display area of the dashboard.
- 4. In the Measures list, find and add the *order_number* field to Indicator (Measures).



- 5. Click **Update**. The system updates the chart.
- 6. On the **Style** tab, configure basic information, chart type, functionality, and series settings.
- 7. Click **Save** to save the dashboard.

Configure settings on the Style tab

• In the **Basic Information** section, set Show Title and Description, Show Link, and Custom background.

Custom background offers three options for the background: Light Color (Default), Dark Color, Color Palette, and Image URL.



? Note

- If you want to redirect to a report or an external page, select **Show Link** and specify Link Text and Link Address.
- Six color templates are available for you to choose.
- In the Style Settings section, set Font Color for Primary Indicator Value and Indicator Alignment.



• In the Functionality Settings section, set conditional formatting.

| Functionality Se | ttings ^ | | | |
|------------------|----------------|----------|--------|------------|
| Series 🔹 o | rder_number | | | ~ |
| V Enable | conditional fo | rmatting | | |
| Tag ic | • • | • | | |
| | ∨ when | | 200000 | <u>A</u> - |
| <u>ب</u> | ∨ when< | | 100000 | A |
| • | ∨ when< | | | A |

- i. Select **Enable conditional formatting**, and select icon themes from the drop-down list of Tag icon.
- ii. You can specify the rules for data that you want to mark out, the icon style, and font color.
- In the Series Settings section, set the measure alias, prefix, suffix, and data display format.



Click Update. The following figure shows an updated chart.



Delete a chart

Perform the following steps to delete a chart:

1. Click the icon in the upper-right corner of a chart.

2. Select Delete.

2.4. Visualization analysis2.4.1. Drilling, filter interaction, and hyperlink

Quick BI supports drilling, filter interaction, and hyperlinks for multi-dimensional data analysis. This topic provides the scenarios and instructions about these features.

Overview

- Drilling: When you click an area or a field on a dashboard, the dimension level changes and the analysis granularity also changes.
- Filter interaction: When you click an area or a field in a chart on a dashboard, the associated charts on the dashboards display data of the area or field.
- Hyperlink: When you click a field in a chart on a dashboard, you are redirected to the linked report. You can use global parameters or URLs for redirection.

? Note

- Quick BI Basic does not support global parameters. We recommend that you use URLs in this edition.
- When you use global parameters for redirection in Quick BI Pro and Quick BI Enterprise Standard, you can be redirected from a cross table in a personal workspace to a report in a group workspace, but cannot be redirected to other reports in the personal workspace.
- Redirection by using global parameters applies to only group workspaces. For more information about group workspaces, see **Concepts**.

Scenarios

The following example describes how to perform filter interactions among charts, drill through a hierarchy to change the granularity of data analysis, and redirect to the Order information pages by using URLs in Quick BI.

The company_sales_record dataset is used in this example. You can use the CSV file sample sales data to create a dataset.

Procedure:

- 1. Edit the dataset
- 2. Create dashboards
- 3. Configure the drilling feature
- 4. Configure the filter interaction feature
- 5. Configure the hyperlink feature

Edit the dataset

Before you use the *company_sales_record* dataset, make sure that the **area**, **province**, and **city** dimensions have been converted to the Geo type and have been added to the same hierarchy.



- 1. Log on to the Quick BI console.
- 2. Click the **Workspace** tab. In the left-side navigation pane, click **Datasets**.
- 3. On the **Datasets** page, click the *company_sales_record* dataset.
- 4. Edit the dataset.

i. (Optional)Change field names.Find the field for which you want to change the name, click the icon next to the field, and then click **Edit**. The following table lists fields in the dataset.

| Field | Data Type | Description |
|------------------|-----------|---|
| order_id | varchar | The ID of the order |
| report_date | datetime | The date on which the order was generated |
| customer_name | varchar | The name of the customer |
| order_level | varchar | The level of an order |
| order_number | double | The number of orders |
| order_amt | double | The amount of an order |
| back_point | double | The discount |
| shipping_type | varchar | The transportation method |
| profit_amt | double | The profit amount |
| price | double | The unit price |
| shipping_cost | double | The cost of transportation |
| area | varchar | The area |
| province | varchar | The province |
| city | varchar | The city |
| product_type | varchar | The type of the product |
| product_sub_type | varchar | The subtype of the product |
| product_name | varchar | The name of the product |
| product_box | varchar | The packaging of the product |
| shipping_date | datetime | The date of transportation |

ii. Create a hierarchy.In the Dimensions list, find area, click the

\$

icon next to the field, and then select **Create Hierarchy**. In the Create Hierarchy dialog box, set Level Name and click **OK**.

iii. Move **province** and **city** to the new hierarchy *area_hierarchy*. In the Dimensions list, click the

icon next to **province** and **city**, choose **Move To > area_hierarchy**, and then click **Save**.

- iv. Convert the fields to the Geo type.
 - Click the

ŝ

icon next to area, and choose Change Dimension Type > Geo > Region.

Click the

\$

icon next to province, and choose Change Dimension Type > Geo >
State/Province/Municipality.

Click the

ŵ

icon next to city, and choose Change Dimension Type > Geo > City.

v. Click Save.

Create dashboards

You must create two dashboards. The following example demonstrates how to create a dashboard named **Company_market _data**.

- 1. Click the **Workspace** tab. In the left-side navigation pane, click **Dashboards**.
- 2. On the Dashboards page, choose Create Dashboard > Standard.You can also choose Create Dashboard > Full Screen as required.
- 3. On the **Data** tab, select the *company_sales_record* dataset and name the dashboard **Company_market_data**.



- 4. Create a pie chart and name it Regional order proportion analysis.
 - i. Click the 🚺 icon. A pie chart appears in the display area of the dashboard.
 - ii. On the **Data** tab, select the required dimension and measure.
 - In the Dimensions list, find area and add it to the Labels (Dim.) field.
 - In the Measures list, find order_number and add it to the Central Angle (Mea.) field.
 - iii. Click Update.

iv. On the Style tab, change the title to Regional order proportion analysis.



5. Create a colored map and name it Regional sales.



6. Create a cross table and name it **Order information**.

| area | product_type | customer_name | order_level | product_box | order_number | |
|--------|--------------|---------------|-------------|---------------|--------------|--------------------|
| Center | Technique | Butt | Others | Small?bag | 33 | o area |
| Center | Technique | Cardy | L1 | Small?Box | 66 | Str. product_type |
| Center | Technique | Clark | L3 | Small?Box | 17 | Str. customer_name |
| Center | Technique | Collins | L1 | Large?Box | 91 | Str. order_level |
| Center | Technique | Collins | L1 | Small?bag | 77 | Str. product box |
| East | Furniture | Ali | L1 | Small?bag | 7 | |
| East | Furniture | Ali | L3 | Huge?Paperbag | 49 | Columns |
| East | Furniture | Barker | L1 | Huge?Box | 18 | Columns |



The following figure shows the newly created dashboard **Company market data**.

Follow the preceding steps to create another dashboard named Order_profit_details.

Create a dashboard and name it **Order_profit_details**. Create a cross table in the dashboard and name it **Order profit details**, as shown in the following figure.

| area | product_type | customer_name | shipping_type | product_box | order_number | order_amt | price | shi | Rows |
|-------|--------------|---------------|---------------|---------------|--------------|--------------------|-------------------|--------|----------------------|
| enter | Furniture | Bishop | Train | Small?Box | 27 | 216.95 | 8.09 | | ø area |
| enter | Furniture | Bishop | Truck | Huge?Paperbag | 33 | 6170.02 | 179.29 | | Str. product_type |
| enter | Furniture | Blake | Truck | Huge?Box | 37 | 12612.66 | 350.99 | | Str. customer_name |
| enter | Furniture | Blake | Truck | Huge?Paperbag | 55 | 7757.91 | 271.4699999999999 | 6 | Str. shipping_type |
| enter | Furniture | Butt | Train | Small?Box | 163 | 17044.089999999999 | 764.1700000000001 | | |
| enter | Furniture | Butt | Train | Small?bag | 35 | 192.21 | 5.47 | | Str. product_box |
| enter | Furniture | Cardy | Train | Large?Box | 96 | 3660.56999999999 | 80.32 | | |
| enter | Furniture | Cardy | Train | Medium?Box | 74 | 4952.01 | 109.71 | 1. | Columns |
| enter | Furniture | Cardy | Truck | Huge?Paperbag | 96 | 13003.64 | 279.28 | | ** order_number(SUM) |
| enter | Furniture | Clark | Train | Medium?Box | 83 | 3301.8975 | 193.31 | | Nº order amt(SUM) |
| enter | Furniture | Clark | Train | Small?Box | 63 | 844.67 | 26.92 | | |
| enter | Furniture | Clark | Train | Small?bag | 56 | 1209.57 | 61.43 | 27.3 🗸 | Nº price(SUM) |

Configure the drilling feature

You must manually configure the drilling feature. The following example demonstrates how to configure the drilling feature. A pie chart is used in this example.

1. On the **Data** tab, click the **Drill Down** icon next to **area**.



- 2. Set the drilling level. In this example, the drilling hierarchy is area > province > city. You can also perform the following operations:
 - Add a drilling dimension. Drag a dimension to the **Drilling (Dim.)** field and adjust its level.
 - Change the level of a field for drilling. Under the **Drilling (Dim.)** field, drag a field and move it to the required level.
 - Delete a dimension field: Under the **Drilling (Dim.)** field, find the field that you want to delete and click the **Delete** icon.

? Note You can enable drilling for a maximum of three dimensions in a cross table. You can enable drilling for only one dimension for other types of charts. You can set a maximum of six levels in a hierarchy for drilling.

3. Click **Update**. The drilling icon appears on the left of the chart title, as shown in the following figure.

Quick BI



Configure the filter interaction feature

1. On the Advanced tab, click the Edit icon next to Filter Interaction.



- 2. In the Filter Interaction dialog box, select area for chart association. You can associate the pie chart with charts that are created based on the same dataset or a different dataset.
 - If you want to associate the pie chart with a chart that is created based on the same dataset as the pie chart, select the colored map **Regional sales** and the cross table **Order information** on the **Current Dataset** tab, and click **OK**.

| Select a field used for interaction. Iniked Charts Current Dataset Another Dataset area Image: Current Dataset (Linked: 2, Total: 2) Image: Current Dataset (Linked: 2, Total: 2) Image: Current Dataset (Linked: 2, Total: 2) | Filter Interaction Selected:Regic | onal order proportio | Datasets: 🗊 compan | y_sales_record_en | | × |
|--|-----------------------------------|--------------------------------------|--------------------|-------------------|-------|---|
| Regional sales Crder information | | Current Dataset (Linke Select All | | | ation | |
| Cancel OK | | | | | | |

- If you want to associate the pie chart with a chart that is created based on a dataset different from the pie chart, select the colored map **Regional sales** on the **Current Dataset** tab and the cross table **Order information** on the **Another Dataset** tab, select **area**, and then click **OK**.
- 3. In the pie chart **Regional order proportion analysis**, click the **East** slice. The cross table **Order information** and the colored map **Regional sales** show the sales details in the **East** region. When you move the pointer over the chart, the detailed interaction information appears in the upperright corner.

| Regional sales | | | | | 🕈 🖉 Regional order prop | ortion analysis | |
|--|--|--|----------------------------|---|-------------------------------|-----------------|--------------------------|
| order_number • 269 - 876 • 876 - 1.48K • 1.48K - 2.09K • 2.09K - 2.7K • 2.7K - 3.3K | | | | | Northwest 7.21% - N 14.22% | umber 7.85K | - South 26.159 |
| | | | | - | Percent | age 18.90% | East 18.909 |
| | | | | + * - | Center 15.8 | 7% | |
| Order information area | | customer name | order level | | | | |
| area | product_type Furniture | customer_name | order_level | | Center 15.8 | 7% | 7 |
| area East | product_type | | | produ | | | |
| area East East | product_type Furniture | Ali | L1 | produ Small?bag | | | 7 |
| area East East East | product_type Furniture Furniture | Ali Ali | L1 L3 | produ Small?bag Huge?Paperbag | | | 7 49 |
| area East East East East | product_type Furniture Furniture Furniture | Ali Ali Barker | L1 L3 L1 | produ Small7bag Huge?Paperbag Huge?Box | | | 7 49 18 |
| area East East East East East | product_type Furniture Furniture Furniture Furniture Furniture | Ali Ali Barker Barker | L1 L3 L1 L1 | produ Small?bag Huge?Paperbag Huge?Box Large?Box | | | 7 49 18 88 |
| | product_type Furniture Furniture Furniture Furniture Furniture | Ali Ali Barker Barker Barker | L1 L3 L1 L1 L3 | produ Small?bag Huge?Paperbag Huge?Box Large?Box Huge?Paperbag | | | 7 49 18 88 4 |

Configure the hyperlink feature

When you click **Office** in the cross table **Order information**, you are redirected to the dashboard **Order profit details** and all the orders with product_type set to **Office** appears.

1. Configure global variables

? Note The following example illustrates redirection by using global parameters. You must configure global parameters in advance.

i. In the dashboard Order profit details, click the Global Variables icon.



ii. In the **Global Variables** dialog box, configure global variables as shown in the following figure and click **OK**.

| Global Variables | | | × |
|---|--|--|---|
| Global Variables product_type Image: Constraint of the second seco | Linked Charts Select All Order profit details | Select a filter field. Select a filter field. | ~ |
| | | Cancel | к |

- 2. Configure the hyperlink feature. Hyperlink can be set to **Parameter** or **External link**. In this example, **Parameter** is selected.
 - i. In the dashboard **Company market data**, select the cross table **Order information** and click the **Advanced** tab in the **Graphic Design** area.
 - ii. Click the Edit icon next to Hyperlink.

| Data | Style | | Adv | anced |
|--------------------|-------|--|-----|-------|
| Advanced Settings | | | | |
| | | | | |
| Auto Refresh | | | | |
| Filter Interaction | | | | |
| Hyperlink | | | | |
| | | | | |
iii. In the **Hyperlink** dialog box, perform the configurations as shown in the following figure and click **OK**.

| Hyperlink _{Selected} : Order profit deta | ils 🏮 com | pany_sales_record | | | | View Operation | on Guide | × |
|---|----------------|-------------------------------|---------------|------------------|---------------------|---------------------|-----------|-----|
| Select a field used for interaction. | Hyperlink | Parameter | Externa | I Link | | | | |
| 💀 product_type 🗸 🖻 | Current Report | | | | Linked Report | | | |
| | | | \sim | 200 | 100 | | \sim | |
| | Dashbo 🗸 | | \sim | 3 0 € | Dashbo \lor | Company_market_data | \sim | |
| | | | | | | Set Global | Variables | i - |
| | | Effective Fields | | I | Linked Global Varia | ables | 0 | |
| | Linked $$ | product_type | \sim | Э⊖€ | No global varial | oles are available. | Ý | |
| | Open in Cur | rrent Window 💿 Op | en in New Wir | ndow | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | | | |
| | | | | | | Cancel | ОК | |

After the configuration, the values in the **product_type** column of the cross table **Order information** appear as hyperlinks.

- iv. Check the hyperlink.Click Office in the cross table Order information, you will be redirected to the dashboard Order profit details and all the orders with product_type set to Office appear.
- 3. If Hyperlink is set to **External Link**, you can be redirected to a specified URL or to a user system by configuring related parameters.
 - i. Select the cross table **Order information** and click the **Advanced** tab in the **Graphic Design** pane.
 - ii. Click the Edit icon next to Hyperlink.

| Data | Style | Ad | vanced |
|--------------------|-------|----|--------|
| Advanced Settings | | | |
| | | | |
| Auto Refresh | | | |
| Filter Interaction | | | |
| Hyperlink | | | |

iii. In the **Hyperlink** dialog box, select a field that you want add the hyperlink, select **External** Link, enter a URL, and then click OK.

(?) Note You can enter the URL in the text box. You can also add dimension fields in the Add Dimensions list to the URL by double-clicking them.

iv. Click the hyperlinked field. You are redirected to the URL or user system.

2.4.2. Metric analysis

This topic describes three analysis methods: auxiliary line, trendline, and fluctuation analysis.

Background information

The following table lists charts that support these analysis methods.

| Chart type | Auxiliary line | Trendline | Fluctuation analysis |
|--------------------------------------|----------------|--------------|----------------------|
| Line chart | \checkmark | \checkmark | \checkmark |
| Area chart | \checkmark | \checkmark | \checkmark |
| Stacked area chart | \checkmark | × | × |
| 100% stacked area chart | 1 | × | × |
| Vertical bar chart | \checkmark | \checkmark | \checkmark |
| Stacked vertical bar chart | 1 | × | × |
| 100% stacked vertical bar chart | 1 | × | × |
| Horizontal bar chart | \checkmark | \checkmark | × |
| Stacked horizontal bar chart | 1 | × | × |
| 100% stacked horizontal bar chart | 1 | × | × |
| Combination chart | \checkmark | \checkmark | \checkmark |
| Trend indicator | × | × | \checkmark |
| Scatter chart | \checkmark | × | × |
| Bubble chart | \checkmark | × | × |

Prerequisites

A dashboard is created. For more information, see Dashboard overview and Create a dashboard.

Auxiliary line

You can add an auxiliary line to view the difference between the value of a measure and the value indicated by the auxiliary line. The value indicated by an auxiliary line can be a fixed or aggregate value. Supported aggregate functions include AVG, MAX, MIN, and Median.

1. Click the Workspace tab. In the left-side navigation pane, click Dashboards. On the Dashboards

page, find the required dashboard and click the \underline{m} icon.

- 2. On the dashboard edit page, click the required chart.
- 3. On the Advanced tab of the Graphic Design pane, click the price icon next to Auxiliary Line in the

Metric Analysis section.

4. In the **Auxiliary Line** dialog box, click Add Auxiliary Line. Select a value type for the auxiliary line that you want to create.

| Auxiliary Line | × | |
|---|----------|---|
| + Add Auxiliary Line | | |
| Auxiliary line 1 Fixed Va V Primary Axis V 1000 | • | |
| Auxiliary line 2 Aggregate profit_amt Average | • | |
| a | Incel OK | 1 |

5. Click OK. The following figure shows a sample auxiliary line.



Fluctuation analysis

The fluctuation analysis feature uses machine learning algorithms to analyze the causes of the fluctuations of key metrics. You can specify the dimensions or measures to analyze the fluctuation causes.

- 1. Click the **Workspace** tab. In the left-side navigation pane, click **Dashboards**. On the Dashboards page, find the required dashboard and click the *i* icon.
- 2. On the dashboard edit page, click the required chart.
- 3. On the Advanced tab of the Graphic Design pane, click the picture icon next to Fluctuation Analysis in the Metric Analysis section.

Note The charts that meet both of the following conditions support fluctuation analysis:

- A time dimension (except hour, minute, and second) is selected for the category axis.
- At least one measure uses the aggregate method SUM, COUNT, or COUNT DISTINCT.
- 4. In the Fluctuation Analysis Settings dialog box, configure Compare Objects and Analysis Dimension, and click OK.

| Fluctuation Analysis Settings | × | Data | Advanced |
|--|---|----------------------------|----------|
| r decention r mail y as becamps | | Advanced Settings \wedge | |
| Measures That Can Be order_amt, profit_amt | | Auto Refresh 5 | |
| Analyzed ① Compare Objects Compare (Quarter t × | | Filter Interaction | |
| | | Hyperlink | |
| Analysis Dimension 3/5 order_level 🔏 area 🕵 product_type 💉 🗸 | | Metric Analysis \wedge | |
| | | Auxiliary Line | |
| Cancel | | Trendline | |
| | | | |

5. Click a time point in the chart and then click Fluctuation Analysis.



6. In the Fluctuation Analysis dialog box, select a measure to view the key factors that affect the measure.

| ✤ Fluctuation Analysis 2014Q4 | Measures That Can Be Analyzed order_amt \checkmark X |
|--|---|
| 2014Q4, order_amt: 103.16M; Compare with2014Q3 (ord | der_amt: 865.62K) , Change166.03K, 19.2%。 |
| Key Influencing Factors areais Change contribution toorder_amtis83.1%, order order_levelis Change contribution toorder_amtis59.3% product_typeis Change contribution toorder_amti product_typeis Change contribution toorder_amtis areais Change contribution toorder_amtis36.7%, order | 6, order_amt: 252.81K; Change98.42K, 63.7%; is52.6%, order_amt: 424.36K; Change87.32K, 25.9%; is51.3%, order_amt: 282.97K; Change85.14K, 43.0%; |
| It Reverse Influencing Factors areais Change contribution toorder_amtis -40.5%, or areais Change contribution toorder_amtis -26.8%, or order_levelis Change contribution toorder_amtis -6.76 product_typeis Change contribution toorder_amti | der_amt: 245.57K; Change-44.53K, -15.4%; |
| 🌣 Change contribution of a dimension = Change in the dimen | nsion/Total change OK |
| Note On the contribution rate of a dimensional dimensionada dimensionada dimensionada dimensionada dimen | ension – Change of the measure to be analyzed |

- Change contribution rate of a dimension = Change of the measure to be analy caused by the dimension/Total change of the measure to be analyzed
- The change contribution rate of a measure indicates how much the measure affects the measure to be analyzed. A great value indicates a great impact.

2.5. Query control

2.5.1. Overview of the filter bar widget

You can use the filter bar widget to query the charts in a dashboard and display the required data.

The filter bar widget allows you to query date, text, and numeric data. Follow these steps to use the filter bar widget:

- 1. Create a query widget in a dashboard. For more information, see Create a query control.
- 2. Configure the filter condition based on the type of fields that you want to query. For more information, see Query data based on a date field, Query data based on a text field, and Query data based on a numeric field.

2.5.2. Create a query control

You can use a query control to query data of one or more charts. On a dashboard, you can create multiple query controls. However, you can pin only one query control to the top.

Prerequisites

A dashboard is created. For more information, see Create a dashboard.

Create a query control

- 1. Log on to the Quick BI console.
- 2. Click the Workspace tab. In the left-side navigation pane, click Datasets.
- 3. On the **Datasets** page, find the *company_sales_record* dataset and click the in icon in the Actions column.

? Note If you are using Quick BI Enterprise Standard, select Standard or Full Screen as the dashboard type. In this example, Standard is selected.

- 4. Click the 📆 icon.
- 5. Click the **New Filter** icon in the middle of the query control or in the upper-right corner of the query control.

| | | + 1211 |
|----------------------------|---|---------|
| O Tips: No query currently | + | Inquire |
| | | |

6. In the Set Query Conditions dialog box, configure the following parameters:

i. Query condition

When you click the + icon next to Query Condition to add a query condition, the default

name of the query condition is **Unnamed**. You can enter a name for the new query condition.



? Note

- After you enter a name for the query condition and move your pointer to anywhere else, the name immediately takes effect.
- You can click the o icon to hide the query condition. After a query condition is

hidden, it is no longer displayed on the dashboard. However, the configuration is retained.

• You can click the : icon to rename or delete a query condition.

ii. Associated charts and fields

Select the charts and fields to be associated with the query control. You can select Smart Field Selection. This feature automatically selects associated fields in the charts that are created based on the same dataset as the current chart. If the number of available charts is excessively large, select the check boxes before the charts that you want to associate.

| Related charts and | | V Field smart 🗊 |
|------------------------------|-------------------|----------------------|
| f <mark>⊠</mark> d§elect all | Q 1 charts | Clear selected field |
| 🗹 🛃 Line Chart | company_s | 🖹 shipping_date(🗸 |

Fields of different data types, for example, a DATE field and a NUMERIC field, cannot be associated with the query control at the same time.



iii. Query condition configuration

Parameters in the Query Condition Configuration pane vary with the type of the associated field. The following figure shows parameters for a year-granularity time field. For more information, see Display mode configurations.

| Query condit | ion configuration | Make required |
|--------------|--|---------------|
| Basic config | uration | \vee |
| Display typ | Date selection | \sim |
| Time granul | year | \sim |
| Screening | filter range e filter rangeNot configured singleyear yearInterval default values manually | |
| Exact time | \checkmark | |
| 2020 | ti i | |
| | | |
| | Cancel | ОК |

iv. Cascading Conditions

For more information, see Configure conditional cascade.

Configure parameters on the Style page

After a query condition is configured, you can set the display style of the query control on the Style page.

1. In the **Basic Settings** section, configure Show Title, Pinto Top, Hide Query Button, and Control Type.



2. In the **Control Style** section, configure Control Height, Layout, and Show Field Label.

| - | | + 🖉 🗄 📗 | | Style |
|-------------|------|---------------|--------------------|------------------|
| Query contr | ol | | | Style |
| query year | 2020 | Ċ, | Basic Settings 🖂 | |
| query level | | ©盲 Inquire | Control style 🔿 | |
| | | | Control height | |
| | | | Adaptive height | ◯ Set manually ① |
| | | | Content typography | |
| | | | = = | |
| | | | Show field labels | |
| | | | = | |

3. In the **Field style** section, specify the value style and filter width for each field. For DATE and NUMERIC fields, you can specify only the filter width. For TEXT fields, you can also set the value style to Drop-Down or Tile.

| Query contr | ol | | Style |
|-------------|-------------------|---------|--------------------------------|
| query year | 2020 | | Basic Settings 🗁 |
| query level | Please select (si | Inquire | Control style ~ |
| | | | Field style 🔨 |
| | | | |
| | | | Field label style Filter width |
| | | | query ye 🔽 1.0 |
| | | | query lev drop down 🗆 1.0 |
| | | | drop |
| | | | Tile |

Display mode configurations

The following sections describe the settings of **Display Mode**.

• Select Date

After you associate a DATE field with a query control, Display Mode is set to Select Date by default, and Time Granularity is set based on the DATE field. Multiple time granularities are supported, including Year, Year-Quarter, Year-Month, Year-Week, Year-Month-Day, and YYYYMMDD HH:MM:SS.

If you select Specify a time range, you can specify **Start At** and **End At**. You can start a query without specifying the two parameters.

| Query Conditi | on Configuration | Required |
|---------------|---|----------|
| Basic Configu | ration | \vee |
| Display Mod | Select Date | \sim |
| Time Granul | Year | \sim |
| | time range a time range Unconfigured | |
| Filter Method | 🔾 SingleYear 💿 YearInterval | |
| Interval Type | ○ Start At ○ End At | |
| Set Defa | ult Filter Value | |

• Value Input Box

If the associated field is a measure, Display Mode is set to Value Input Box by default. You can set Aggregation Method, which has a default value SUM. You can modify the parameter value to No Aggregation or another aggregation method. In this example, the parameter is set to AVG.

(?) Note If an aggregation method is used in a query control, the query control cannot be used to query detailed data. You can set Condition to Single Condition, Or Condition, or And Condition. If you want users to preview a report by using a fixed condition, for example, the Equal To condition, select Lock Filter Condition.

| Associated ChartsQ | Total 1 Charts | Smart Field () | Query Condition Configuration | Required |
|---------------------------|----------------|-----------------------|--|--------------------|
| Select All | | Clear Selected Fields | Basic Configuration | \vee |
| 🗹 ൽ Line Chart | company_sal | № order_number | Display Mod Value Input Box | \sim |
| | | | Aggregat SUM | \sim |
| | | | Condition Or Condition Or Condition | And Condition |
| | | | Set Default Value | |
| | | | = (Equal To) V Numeric | |
| | | | Lock Filter Condition (You cannot change the cond preview page after this function is enabled.) | lition type on the |

• Text Input Box (Former "By Condition")

Similar to Value Input Box, Text Input Box provides three conditions for you to choose: Single Condition, Or Condition, or And Condition. However, text input boxes are suitable for dimensions, and support condition types such as Exact Match, Include, and Exclude.

| Associated ChartsQ To | | Smart Field 🛈 | Query Condition Configuration | Required |
|----------------------------|-------------|------------------------|---|----------|
| Select All | | Clear Selected Fields | Basic Configuration | ~ |
| 🗹 ւ L ine Chart | company_sal | Str product_sub_type 🗸 | Display Mod Text Input Box (Former "By Condition") | \sim |
| | | | Condition Single Condition Or Condition And Co | ondition |
| | | | r Exact Match V Character or Value | |
| | | | Exact Match V Character or Value | |
| | | | Lock Filter Condition (You cannot change the condition type preview page after this function is enabled.) | on the |

• Drop-Down List (Former "By Value")

You can select enumerated values from a drop-down list. In this version, the available enumerated values come from auto-parsing, a single dataset, or manual input.

• Auto Parsing

Auto parsing returns all values of the fields that are used for chart association. The fields are order_level and product_type. The available enumerated value include all values of the fields, as shown in the following figure. You can set Query Method to Single or Multiple.

| Associated ChartsQ Total 2 Charts | Smart Field 🛈 | Query Condition Configuration | Required |
|-----------------------------------|-----------------------|--|------------|
| Select All | Clear Selected Fields | Basic Configuration | \vee |
| Pie Chart-com company_sal | Str order_level | Display Mod Drop-Down List (Former "By Value") | \sim |
| Vertical Bar Ch company_sal | Str product_type | Source Auto Parsing Single Dataset Ma Query Method Single Multiple | nual Input |
| | | Set Default Filter Value Select (single selecti | |

• Single Dataset

If you set Source to Single Dataset, you can select any dataset in the current workspace and then configure query fields.

? Note In this version, query fields can be different from display names. After you select a query field, Quick BI automatically fills in a display name the same as the query field. If they are different, you only need to modify the display name.

| Associated ChartsQ Total 2 Charts | Smart Field (i) | Query Condition Configuration | Required |
|-----------------------------------|-----------------------|--|--------------|
| Select All | Clear Selected Fields | Basic Configuration | \checkmark |
| Z 🕓 Pie Chart-com company_sal | Str order_level | Display Mod Drop-Down List (Former "By Value") | \sim |
| 🗹 바 Vertical Bar Ch company_sal | Str product_type | Source O Auto Parsing Single Dataset O Ma | anual Input |
| | | company_sales_record | \sim |
| | | Query Str customer_name | |
| | | Display Str customer_name 🗸 (| D |
| | | Query Method | |
| | | ✓ Set Default Filter Value ① | |
| | | Select (single selecti V | |

• Manual Input

When Source is set to Manual Input, query fields can be different from display names. For example, when you enter IDs in the Query Value section, person names are displayed in the Display Name section.

| Associated ChartsQ Total 2 Charts | Smart Field 🗊 | Query Condition Configuration | Required |
|-----------------------------------|-----------------------|---|------------|
| Select All | Clear Selected Fields | Basic Configuration | ~ |
| Pie Chart-com company_sal | Str order_level | Display Mod Drop-Down List (Former "By Value") | \sim |
| Vertical Bar Ch company_sal | Str product_type | Source Auto Parsing Single Dataset Manual Input Configured | nual Input |
| | | Query Method Single Multiple Set Default Filter Value | |
| | | Zhang San 🗸 🗸 | |

The following figure shows the Manual Input dialog box.

| Manual Input Quick Input: Copy two columns from the data table. | | | | | | |
|---|--|--|--|--|--|--|
| * Query Value | Display Name | | | | | |
| 1 2 3 4 | Zhang San Li Si Wang Wu Cheng Liu | | | | | |
| 4 rows added f Clear | 4 rows added Clear | | | | | |
| | Cancel OK | | | | | |

• Tree

The tree display mode is similar to the cascading display mode in previous versions. It implements the control relationships between fields in a dataset. You must select a dataset before you use the tree display mode. You can set Display Form to Tree-shaped or Tiled.

If you select Shortcut Association, the associated charts and fields in the current dataset are automatically added to the sub-levels of the tree structure. For example, the sub-level of the tree structure is province. After you select Shortcut Association, charts that are created based on the same dataset company_qbi_testdata are selected and the associated field that corresponds to province is also selected. If you want this function to take effect on charts that are created based on different datasets, select the charts and associated fields.

| | _ | | | | |
|-------------------------------|-----------------------------------|---------------------------------|-----------------|------------------------------|---------------------------------------|
| Associated ChartsQ Total 2 Ch | harts Smart Field (| D Display Mod | Tree | | \sim |
| Select All | Clear Selected Field | s Select Da | company_s | sales_record | \checkmark |
| 🗹 🕓 Pie Chart-com comp | oany_sal Str area 🗸 | Tree Stru | | | |
| Vertical Bar Ch comp | oany_sal Str area | Str area | | Str area | Query Condition- Associated |
| | | Str pro | ovince | Str province | Associated Charts |
| | | د Str | city | Str city | Associated |
| | | Preview name fie | | value field (left) displa | y Ø Structure Configuration |
| | | Set Defa | n | | |
| Set Query Conditions | | | | V | iew Operations Guide> X |
| | Associated ChartsQ Total 3 Charts | Smart Field 🗊 | Query Condition | 1 Configuration | Required |
| Str province | | Clear Selected Fields avince | | The selected field is at the | |

2.5.3. Query data based on a date field

This topic describes how to use a query control to query data based on a date field.

Prerequisites

- A dashboard is created.
- A query control is created on the dashboard. For more information, see Create a query control.

Query the orders within a specific month

1. Select the created dashboard. It contains the following chart and query control.

| Tips: No query currently + Inquire | Data St |
|--|----------------------------|
| | Data Source Type: |
| Line Chart | Value Axis (Mea.) |
| - order_number | NO order_number(SUM) |
| 5K 4K 3K 2K | Category Axis (Dim.) |
| 0 Z00907 - Z | |
| shipping_date(month) | Color Legend (Dim.) 0 / 1 |
| Martin Ma | Drag and drop fields here. |

- 2. Click the New filter icon in the query control. In the Query condition setting dialog box that appears, configure the following parameters:
 - i. Set the query condition name to **Monthly query**.
 - ii. Select Line Chart and the order_date(month) field to associate with the query control.

| Query condition setting | | | | | View O | peration Guide> X |
|-------------------------|---|--------------------|-------------------------|--|--|-------------------|
| Query conditions | + | Related charts and | | Field smart 🗊 | Query condition configuration | Make required |
| | ▼ | Related charts and | Q 1 charts company_S | Field smart () Clear selected field report_date(m) ~ | Query condition configuration Basic configuration Display typ Date selection Time granul years Set time filter range Set time filter range Screening singlemonth interval typ Start at Ends at Fast range Set default filter value | ✓ ✓ ✓ |
| | | | | | Cancel | ОК |

? Note Quick BI selects a time granularity in the right-side Query condition configuration pane based on the date granularity of the associated field. In this example, the field is on a month granularity, so Year-month is selected for Time granularity in the right-side pane.

- iii. Specify the display type, time granularity, filter range, filter method, and interval type.
 - In the Set time filter range section, you can specify the time range within which the data can be queried. After the configuration is complete, the time range that you specified in the query control must be within this range.

| Set default filter value | | | | | | |
|--------------------------|---------|------------|-----------|--|--|--|
| 2020-01 | | 2020-05 | | | | |
| Start at | | Ends at | | | | |
| Exact time | \sim | Exact time | \vee | | | |
| 2020-01 | <u></u> | 2020-05 | \exists | | | |

You can set Screening mode to singlemonth or monthinterval and set a default value. In this example, monthinterval is selected and Interval type is set to Time interval.



? Note

- If you select Make required, the system starts data query only after all fields in this query condition are specified.
- If Screening mode is set to monthInterval, you can set Interval type to Start at, Ends at, Time interval, or Fast range.

Fast range is available only for the month and day granularities and allows you to select a time range in the Quick range drop-down list, which is convenient.

| Set time filter range | |
|---|--|
| Set time filter rangeNot configured | |
| Screening 🔿 singlemonth 💿 monthInterval | |
| Interval typ 🔘 Start at 👋 Ends at 🔿 Time interval | |
| Fast range | |
| 28 Customized | |
| this month gured in | |
| Set defa 🗌 last month | |
| ✓ Last 3 months | |
| Last 6 months | |
| Last 12 months | |
| | |

After Quick range is set, you can select a preconfigured range or click **customize** on the dashboard. If you select **customize**, you can manually specify a time range.

| * Month | | | | | | 0 ā | |
|----------------------------|-------------|----------|-------------|------------|--|--|---------------------|
| Last 3 | months | \sim | 2020-03 | — - | 2020-05 | | Inquire |
| custor | mize | | | | | | |
| Last 3 | 3 months | | | | | | |
| Last 6 | o months | | | | - order_number | | |
| Last 1 | 2 months | | | | | | |
| eq Mnu 3K 2K 1K 0 | | | | | | | |
| | 200910-???它 | 200901-4 | 坡 200902-中级 | 200903-中级 | 200904-中级 200905-中级 | ž 200906-中级 200907-中级 | 200908-中级 200909-中级 |
| | | | | | shipping_date(month) | | |
| | m | \sim | m | | ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~ | ~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~ | mm |
| | | | | | | | |

- 3. Click OK.
- 4. In the query control, specify the time range that you want to query and click **Inquire**. The chart to which the query control applies is updated.



2.5.4. Query data based on a text field

This topic describes how to use a query control to query data based on a text field.

Prerequisites

- A dashboard is created.
- A query control is created on the dashboard. For more information, see Create a query control.

Procedure

1. Select the created dashboard. It contains the following chart and query control.



- 2. Click the New filter icon in the query control. In the Query condition setting dialog box that appears, configure the following parameters:
 - i. Set the query condition name to Order query.
 - ii. Select Line chart and the order_level field to associate with the query control.
 - iii. Set Display type to one of the following values:
 - Drop-down list (formally enumerated filter)

When Display type is set to **Drop-down list (formally enumerated filter)**, you can set Option value source to **Automatic parsing**, **Single data set**, or **Enter manually**. Option value source indicates the source of available values of the query condition field.

- When Option value source is set to Automatic parsing, the values of the query field are automatically parsed. Up to 1,000 values can be displayed.
- When Option value source is set to Single data set, you can select a dataset in the workspace of the current dashboard. We recommend that you select the dataset of the associated chart. The relationships between the associated field, Query Value Field, and Query name field are as follows:

| Query condition setting | J | | | | | View Operation | Guide> | \times |
|-------------------------|-----|------------------------------|-------------------|----------------------|-------------------------------------|--|-----------|----------|
| Query conditions | + | Related charts and | | 🔽 Field smart 🕧 | Query cond | ition configuration | Make | require |
| II Order query | © : | f <mark>⊠</mark> d§elect all | Q 1 charts | Clear selected field | Basic config | guration | | \sim |
| | | 🗹 鍫 Line Chart | company_s | Str order_level | Display typ | Drop-down list (formerly enumerated fi | lter) | \sim |
| | | | | | Option value source Automa | tic parsing) Single data set) Er | nter manu | ually |
| | | | | | | company_sales_record_copySQLServ | er | \vee |
| | | | | | | Query Value Field | | |
| | | | | | | Query name field Str order_level ~ | () | |
| | | | | | inquiry mode | Single choice Multiple choice | | |
| | | | | | Set filte | r defaults 🕧 | | |
| | | | | | | Cancel | ОК | |

- The associated field is the field you want to associate with the query control in the chart.
- Query Value Field is the field in the source dataset that is used to match the associated field.
- Query name field is the field in the source dataset that is used to filter data. This field is
 displayed in the query control.
- Query name field is the same as Query Value Field by default. After you specify Query Value Field, Query name field is automatically set. If the two values are inconsistent, you must manually specify the same value for the two fields.

■ When Option value source is set to Enter manually, click the 🖉 manual input icon. In the

manual input dialog box that appears, specify Query value and show name.

? Note

- If it is the first time that you manually enter the values and Query value and show name are consistent, you only need to specify Query value. After you click OK, show name is automatically set.
- If it is the first time that you manually enter the values and Query value and show name are inconsistent, you must manually specify both values.
- If it is not the first time you manually enter the values, you must manually enter the new query value and the show name. If you enter only the query value, the following error message is displayed.

| | Quick filling: Copy two columns directly from the data table for filling |
|---------------|--|
| manual input | Quick filling: Copy two columns directly from t |
| * Query value | show name |

Text input box (formally conditional filter)

When Display type is set to **Text input box (formally conditional filter)**, Conditional form can be set to **Single condition**, **Or condition**, or **And condition**. In this example, Conditional form is set to **Or condition**.

| Query condition setting | I | | | | View Operation Guide> × |
|-------------------------|-----|------------------------------|---------------------|----------------------|--|
| Query conditions | + | Related charts and | | 🗹 Field smart 🗊 | Query condition configuration |
| II Order query | ⊚ ! | f <mark>⊠d</mark> §elect all | Q , 1 charts | Clear selected field | Basic configuration V |
| | | 🗹 📈 Line Chart | company_s | Str order_level 🗸 | Display typ $~~$ Text input box (formerly conditional filter) $~~\vee~$ |
| | | | | | Conditional form Single condition • Or condition • And condition Set default value <u>or</u> Contain <u>v</u> Middle <u>or</u> Contain <u>v</u> High Contain <u>v</u> Contain <u>v</u> Starts with <u>v</u> High Condition type after opening) |
| | | | | | Cancel |

Tree drop

When Display type is set to **Tree drop** (formally cascading query), fields from both the current dataset and another dataset can be selected. Display form can be set to **Tree display** or **Tiled display**. Follow these steps to configure Tree display:

a. Select a dataset and click **Start configuration**.

b. In the **Tree structure design** dialog box, specify Query Value Field and Display name field for each level.

? Note

- The value of Display name field is the same as that of Query Value Field by default. If the values are inconsistent, you must manually specify the same value for the two fields.
- Up to four levels are supported.
- c. Click OK.

After the configuration is complete, you can view the query levels in the left-side navigation pane of the **Query condition setting** dialog box. You can click the **matrix** icon to show or hide

query levels and click the opicon to hide this filter in the query control, but the

configurations are retained.

| Query condition setting | | | | | View Ope | ation Guide> | × Inquire | Basic |
|-------------------------|------------------------------|-------------------|------------------------------------|-----------------------------|------------------------------|-------------------------------------|-----------------|-------|
| Query conditions + | | | - | pipping typ | nee drop | | inquire | Basic |
| | Related charts and | | Field smart () | Select data | | | | |
| II Order query 🔚 🕲 🗄 | f <mark>⊠d</mark> ⊛elect all | Q 1 charts | Clear selected field | set | company_sales_record_copySQ | LServer V | | |
| Str area | 🗹 鍫 Line Chart | company_s | Strorder_level ~ | Tree structure design | | | | |
| | | | | Str orde | r_level Str order_level | Associated with query conditions | | |
| | | | | ó Strar | ea Str area | Association | | |
| | | | | Su al | Su died | chart | 200909-中级 | |
| | | | | Str | product_type Str product_typ | e Association | | Con |
| | | | | | | chart | | |
| | | | | | | ∕2Structure configuration | | |
| | | | | Display form: | Tree structure design | | | |
| | | | | Set def | Query Value Field | Display nam | | |
| | | | | | Query Value Field | Display na | ame field 🕕 | |
| | | | | | Leveltwo Str area | ✓ Str area | | |
| | | | | | Query Value Field | Display | name field 🕕 | |
| | | | | | Levelthree Str product_type | Str p | roduct_type 🗸 🛈 | |
| | | | | | Add hierard | hy 3/4 | | |
| | | | | | | | Cancel | v |
| | | | | | | | Cancel | ĸ |

Onte Quick association is enabled by default. This feature automatically selects associated charts and fields in the same dataset for sub-levels of a tree structure. Click Association chart in the tree structure or the sub-level name in the left-side navigation pane to associate the sub-level with charts and fields in another dataset.

| Query condition setting | | | | | | View O | peration Guide> × |
|-------------------------|---|-------------------------|-------------------------------------|------------------------------------|------------------|--------------------|--|
| Query conditions + | Related charts and | | V Field smart 🗊 | Query cond | ition configurat | tion | Make required |
| Str product_type | f <mark>⊠d</mark> §elect all ☑ ☆ Line Chart | Q 1 charts company_s | Clear selected field Strorder_level | Basic config Display typ | Tree drop | | v |
| | | | | set Tree structure design | | ales_record_copy\$ | SQLServer V |
| | | | | Str orde | | Str order_level | Associated with query conditions Association |
| | | | | Str | product_type | Str product_t | chart type Association chart |

For example, after you click Association chart next to the second level **area**, associated fields of **Line chart 1** and **Line Chart 2** that are created based on the same dataset are automatically selected. However, the associated field of **Vertical car chart** that is created based on another dataset must be manually entered.

- 3. Click OK.
- 4. In the query control, click **Inquire**. The chart to which the query control applies is updated. The following figure shows the query results when Display type is set to **Tree drop**.



2.5.5. Query data based on a numeric field

This topic describes how to use a query control to query data based on a numeric field.

Prerequisites

- A dashboard that contains numeric fields is created.
- A query control is created on the dashboard. For more information, see Create a query control.

Procedure

1. Select the created dashboard. It contains the following chart and query control.



- 2. Click the New filter icon in the query control. In the **Query condition setting** dialog box that appears, configure the following parameters:
 - i. Set the query condition name to Order quantity query.
 - ii. Select Line chart and the order_number field to associate with the query control.
 - iii. When the field type is numeric, set Aggregation method and Conditional form as required. Display type is automatically set to Numerical input box. Supported aggregation methods include multiple aggregate functions, variance, and standard deviation. Supported conditional forms include Single condition, Or condition or And condition. In the following example, Aggregation method is set to Summation and Conditional form is set to And condition.

| Query condition setting | | | | | | | View Operation Gu | iide> × |
|-------------------------|------|--------------------|--------------------------------------|--|---|----------------------------------|--------------------------------------|---------------|
| Query conditions | + | Related charts and | | 🔽 Field smart 🗊 | Query cond | ition configuration | | Make required |
| # query order number | © :: | fids∳elect all | Q 2 charts company_S company_S | Clear selected field № order_number ✓ | Aggregation method Conditional form Single • Set def And Lock th | Numerical input box Summation | dition () And cond 10000 15000 | |
| | | | | | | | Cancel | ОК |

? Note

• If you select Single condition for Conditional form, you can configure only one filter condition.

| Con form | ditional | |
|-------------|---|---|
| • | Single condition Or condition And condition | |
| | Set default value | |
| | = (Equal to) | |
| | = (Equal to) ion (the preview page cannot switch th | е |
| con | ! = (Not equal) | |
| | > (Greater than) | |
| | > = (Greater than | |
| | <(Less than) Cancel OK | |
| - | <= (Less than | |

If you select Lock the filter condition, you cannot change the filter type on the preview page.

| forr | ditional Single condition O Cr condition O And condition | |
|----------|---|--|
| v | Set default value | |
| | = (Equal to) Value | |
| \sim | Lock the filter condition (the preview page cannot switch the | |
| con | lition type after opening) ery order number | |
| con | lition type after opening) | |

- 3. Click OK.
- 4. In the query control, specify the time range that you want to query and click **Inquire**. The chart to which the query control applies is updated.



2.5.6. Configure conditional cascade

You can associate two query controls. For example, if query control A and query control B are associated, when you select an area in query control A, the province list of query control B displays only the provinces in this area. You can also associate multiple conditions in a query control. This topic describes how to configure conditional cascade to associate query controls.

Prerequisites

- A dashboard is created.
- Two query controls are created on the dashboard, with Display Mode set to Drop-Down List (Former "By Value") and Source set to Single Dataset. For more information, see Query data based on a text field.

Context

When you configure conditional cascade, note the following limits:

• Upper-level fields can control the display of lower-level fields. However, lower-level fields do not affect upper-level fields. Conditions at the same level can affect each other.

(?) Note Assume that query fields specified in query control A are area and product_type, and those specified in query control B are province and product_sub_type. If the two controls are associated, when you select an area in query control A, the provinces in the area are selected in query control B. This indicates that fields in query control A are upper-level fields and those in query control B are lower-level fields. All fields in query control A affects query control B. For example, If you select furniture for product_type in query control A, values such as bookshelf and table are displayed for product_sub_type in query control B. However, fields in query control B do not affect query control A.

- Cascading configuration is not supported on mobile terminals.
- You can configure up to five conditions for cascading.
- Conditional cascade is supported only by query controls that have text fields and with Display Mode set to **Drop-Down List (Former "By Value")** and Source set to **Single Dataset**.

• Different query controls may have the same fields. You can modify the value of **Control Name** for easy identification.



Open a cascade condition configuration dialog box

- 1. Log on to the Quick BI console.
- 2. Click the **Workspace** tab. In the left-side navigation pane, click **Dashboards**.
- 3. Click the required dashboard.

Onte Conditional cascade is supported only by query controls that have text fields and with Display Mode set to Drop-Down List (Former "By Value") and Source set to Single Dataset.

4. Click the 🜌 icon next to Cascading Conditions.

| Page Settings |
|-----------------------------|
| Basic Settings ^ |
| |
| Show Watermark |
| ✓ Allow Download |
| Hide Header on Mobile Phone |
| |
| Theme Design |
| |
| Official Template • |
| Skin |
| |
| Light Dark |
| Theme Color |
| |
| |
| Business Classic |
| |
| Cascading Conditions ^ |
| Cascade Configuration Items |

| Set Query Conditions | | | View | ∕ Operations Guide> X |
|--------------------------------|--|-----------------------|-------------------------------|-----------------------|
| Query Condition + | Associated ChartsQ Total 5 Charts | Smart Field () | Query Condition Configuration | Required |
| Unnamed | Select All | Clear Selected Fields | | |
| | - Contract - Second and | | | |
| | 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 | | | |
| | A second data in the second sec | | | |
| | Contraction and an experimental | | | |
| | the second second second | | | |
| | | | | association first. |
| | | | | |
| | | | | |
| | | | | |
| Conditional Cascade Configurat | ion | | Cance | el OK |

You can also click **Conditional Cascade Configuration** in the **Set Query Conditions** dialog box.

The **Conditional Cascade Configuration** dialog box appears.

| Conditional Cascade Configuration (Cascade configurations are dashboard-level query conditions.) | | | | | |
|---|----------------------------------|--|--|--|--|
| Cascade Configuration Items Cascade Condition 1 ····· Cascade Condition 2 ···· Cascade Condition 3 ···· Cascade Condition 4 ···· Cascade Condition 5 | + Add Cascade Configuration Item | | | | |
| Cascade Configuration Items | (1/5) Conditions Added 📋 | | | | |
| Select the conditions | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| 1. Conditions at the same level can be cascaded. Upper-layer conditions can be cascaded with the lower-layer conditions. However, lower-layer conditions cannot be cascaded with the upper-layer conditions. 2. Cascade configurations do not take effect on mobile devices. | Cancel Confirm and Return | | | | |

Configure conditional cascade

Assume that query fields specified in query control A are area and product_type, and those specified in query control B are province and product_sub-type. After the area and province fields are associated, when you select an area in query control A, the province list of query control B displays only the provinces in this area.

1. In the Cascade Configuration Items section, select area and then click the 🕂 icon.



- 2. Perform the following configurations:
 - i. The drop-down list may contain multiple province fields, select the one in query control B.

| Cascade Configuration Items | |
|------------------------------|-------------------------------------|
| area(Query Control) 🗸 🗸 | Select the conditions |
| You do not need to config () | Q Enter a keyword |
| | Query Control |
| | Product type province Query (|
| | province |
| | product_sub_type |

ii. Select an associated field.

? Note The associated field refers to a field in a dataset. The field is associated with the area field in query control. In this example, the area field in query control A is an upper-level field and the province field in query control B is a lower-level field, and the area field selected is associated with the area field in query control A.

| Cascade Configuration Items | |
|------------------------------|-------------------------------|
| area(Query Control) 🗸 | province(Query Control) 🗸 🗸 |
| You do not need to config () | Select an associated field. 🔨 |
| | Q Enter a keyword |
| | Str customer_name |
| | Str order_level |
| | Str shipping_type |
| | Str area |

3. (Optional)If you want to configure multiple cascade conditions for query controls A and B, click Add Cascade Configuration Item and repeat steps 1 and 2.

| rea | Product_type | | | | |
|------------------------|------------------|----------|-------------|--------------|-------|
| East V | Furniture V | | | | Query |
| | | | | | |
| Cross Table-company_sa | ales_record_en | | | | |
| area | | province | order_level | order_number | |
| East | Shanghai | | L2 | | 7 |
| | | | | | |
| | | | | | |
| | | | | | |
| rovince | product_sub_type | | | | |
| Shanghai V | Table V | | | | Quer |
| | | | | | |

4. After the configuration is completed, click **Confirm and Return**. If you select **Northwest** for **area** in query control A and select **province** in query control B, only provinces in northwest China are listed in query control B.

| ar | ea Northwest | \sim |
|----|----------------------------|--------|
| | | A = |
| pr | ovince Select (single s | 2 ē |
| ſ | Q Search by r | |
| | Gansu | |
| | Ningxia | |
| | Qinghai | |
| | Shanxi | |
| | Xinjiang | |

Modify the conditional cascade configuration.

You can perform the following operations:

• Rename a cascade configuration item.

When you add a cascade configuration item, the default name is **Cascade Configuration Items**. You can click it to rename the item.



• Delete a cascade configuration item.

Click the **Delete** icon in the upper-right corner of a cascade condition to delete the condition. Click the **Delete** icon in the upper-right corner of the cascade configuration item to delete the cascade configuration item.

| Cascade Configuration Items | + Add Cascade Configuration Item |
|---|----------------------------------|
| Cascade Condition 1 Cascade Condition 2 Cascade Condition 3 Cascade Condition 4 Cascade Condition 5 | |
| Cascade Configuration Items | (2/5) Conditions Added |
| area(Query Control) V You do not need to config ① | |

2.6. Common widgets

The presentation area of a dashboard supports the following widget types. You can double-click or drag a widget to add it to the presentation area of a dashboard.

• Standard mode

- Filter bar
- Text area
- IFrame
- TAB
- Image
- Full-screen mode
 - Text area
 - IFrame
 - Image

2.6.1.

1.

| | | Query | Data | |
|--|---|---------------------------|----------------------------------|------------------------|
| | | adory - | Filter Fields | company_sale |
| rder_number > V | | | order_number | Q Search by Dimensions |
| der_amt > V | | | order_amt © | |
| Set Filter _{Dataset:} \$\$company_4 | sales_record_e | | | |
| View Filter Fields | Label Name: product_type | Enter a filt | ter. (Enter a value for data fil | ltering.) |
| str. product_type | Current Dataset Another Dataset | Set Filter Cor | nditions 🖒 Set | Value Range |
| | Current Dataset (Linked: 0, Total: 1) ① Select All Enter a keyword. | Filter by Single Selec | | ilter by Value |
| | □ ACharts-Line Chart-company_sales_record | | × | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

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- 2.
- 3.
- 1.
- 2.
- 3.
- 5.
- 4.





2.

| | Data | |
|-----------|---------------|-----|
| province: | Filter Fields | |
| Query | province | |
| | province | 600 |

? Note 3.

| Note | |
|------|--|
| 0 | |
| 0 | |
| | |



| View Filter Fields | Label Name: province | Enter a filter. (Enter a value for data filtering.) |
|--------------------|---|--|
| str. province | Current Dataset Another Dataset | Set Filter Conditions You can only filter by specified v |
| • sn. city | Current Dataset (Linked: 0, Total: 2) ① | Display Mode: 📄 Tree 💽 III Tile |
| o 🐲 product_type | Select All Enter a keyword. Charts-Cross Table-company_sales_record | Single Select |
| | □ ^{de} Charts-Line Chart-company_sales_record | Cascading data loading |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | Cancel OK |

? Note

| province : Shanghai | | product_type : Jiao> Furniture | ~ | Query |
|------------------------|------------|-----------------------------------|-------------|--|
| Line Cha | art | -order_number | - order_amt | : O Ranghai, Henan / Anyang, Hebi, Jiaozuo / Furniture |
| 12K 10K 8K 6K | | | | Fumure |
| 4K 2K 0 | Henan-Anya | ng-Furnit | | Henan-Jiaozuo-Furnit |
| ? No | te | | | |

| Se | et Filter _{Dataset:} Scompany_s | sales_record_e | | | | | | | | | × |
|----------------|--|--|-------------------------------|-----------------|---|---|---------------------------------------|-----|---|----|----------|
| V E | fiew Filter Fields report_date(day) shipping_date(month) | Label Name: shipping_date(mo Current Dataset Another Da Current Dataset (Linked: 0, To Select All Enter a keywo Arthur Charts-Line Chart-corr | ataset tal: 1) (j) ord. | s_record | | Enter a filter. Set Filter Condit Filter by D Set Default V Shortcut Time Range | ions Duration alues Duration | Set | Itering.) Time Range Iter by Date | | |
| 1. 2. 3. | Set Filter Dutaset: @company_sales,re | ecord | | | | | × | | Cancel | Oł | c |
| | shipping_datelyear) | el Name: shipping_date(year) Current Dataset Current Dataset (Linked: 1, Totak 2) Select All Enter a keyword. Control Cross Table-company_sales_reco Charts-Line Chart-company_sales_recor | | Set Filter Cond | C End At: Relative 1 Select a G The • ic Query Vears | Set Time Range | | | | | |
| 4. | ? Note | | | | | Cancel | OK | | | | |
| 5. | | | | | | | | | | | |

| Set Filter _{Dataset} : @company_ | sales_record_e | | × |
|---|---|-----------------------|-------------------|
| Str. order_level | Current Dataset Another Dataset | Set Filter Conditions | 🖒 Set Value Range |
| | Current Dataset (Linked: 0, Total: 1) ① Select All | Filter by Condition | Filter by Value 🖌 |
| | □ ✓ Charts-Line Chart-company_sales_record_en_testL | Single Select Multip | v v |
| | | | Cancel OK |
| 1. 2. | | | |

3.

| View Filter Fields | Label Name: product_box | | |
|--------------------|---|--------------------------------|------------------------|
| ᆇ product_box | Current Dataset Another Dataset | Set Filter Conditions | 🔕 Set Value Range |
| | Current Dataset (Linked: 1, Total: 1) () | Set Value Range | |
| | Select All | Search by name. | Added Items: 4 🖉 Speci |
| | Charts-Line Chart-company_sales_record_en_testL | Huge Box | Medium Box |
| | | Huge Paperbag | Large Box |
| | | Large Box | Small bag |
| | | Medium Box | Small Box |
| | | Paperbag | |
| | | Small Box | |
| | | Small bag | |
| | | Select All | Added Items: 4 |

| | Label Name: product_box | | | |
|---|--|-------------------------------|--|--|
| 🗪 product_box | Current Dataset Another Dataset | Set Filter Conditions | 🖒 Set Value Range | |
| | Current Dataset (Linked: 1, Total: 1) ① | Filter by Condition | Filter by Value | |
| | Select All Charts-Line Chart-company_sales_record_en_testL | Single Select Mult | tiple Select II bag,Small * | |
| | | Search by name. | Added Items: 4 🖉 Specify Medium Box | |
| | | Large Box | Large Box | |
| | | ✓ Small bag | Small bag | |
| | | Small Box | Small Box | |
| | | | | |
| | | Select All | Added Items: 4 💼 | |
| | | Add by Select Sequent | се ОК | |
| | | | | |
| Set Filter _{Dataset:} | €company_sales_record_e | | | |
| Set Filter Dataset: View Filter Fields | | | | |
| | ©company_sales_record_e Label Name: order_amt Current Dataset Another Dataset | S | et Filter Conditions | |
| View Filter Fields | Label Name: order_amt | Si | | |
| View Filter Fields | Label Name: order_amt Current Dataset Another Dataset | | | |
| View Filter Fields | Label Name: order_amt Current Dataset Another Dataset Current Dataset (Linked: 0, Total: 1) ① | ۲ | Or And | |
| View Filter Fields | Label Name: order_amt Current Dataset Another Dataset Current Dataset (Linked: 0, Total: 1) ① Select All | ۲ | | |
| View Filter Fields | Label Name: order_amt Current Dataset Another Dataset Current Dataset (Linked: 0, Total: 1) ① Select All | ۲ | Or And | |
| View Filter Fields | Label Name: order_amt Current Dataset Another Dataset Current Dataset (Linked: 0, Total: 1) ① Select All | ۲ | Or And | |
| View Filter Fields | Label Name: order_amt Current Dataset Another Dataset Current Dataset (Linked: 0, Total: 1) ① Select All | ۲ | Or And | |
| View Filter Fields | Label Name: order_amt Current Dataset Another Dataset Current Dataset (Linked: 0, Total: 1) ① Select All | ۲ | Or And | |
| View Filter Fields | Label Name: order_amt Current Dataset Another Dataset Current Dataset (Linked: 0, Total: 1) ① Select All | ۲ | Or And | |
| View Filter Fields | Label Name: order_amt Current Dataset Another Dataset Current Dataset (Linked: 0, Total: 1) ① Select All | ۲ | Or And | |

3.

2.6.2. Compound query control

This topic describes how to use a compound query control. It uses nested OR and AND relationships to implement compound query of charts in the same dataset.

> Document Version: 20210117
Prerequisites

The dashboard edit page is displayed.

Procedure

1. Click the Compound Query Control icon.



- 2. Perform the following operations on the **Data** tab:
 - Select a dataset from the Dataset drop-down list.
 - Click the 🗾 icon to go to the dataset edit page. You can edit dimensions and measures.
- 3. Click Configure Selector to add fields you want to query.

| Compound Query Control | |
|---------------------------|----------|
| Data | Style |
| Dataset | |
| company_sales_record_utf8 | |
| Configure | Selector |

- 4. On the **Style** tab, you can perform the following configuration:
 - Basic Settings: You can set Show Title, Widget Name, and Hide Query Button.



• Style of Controls: You can set Height of Controls and Show Label Name.



• Style of Field: You can set Selector Width.



5. Click **Configure Selector**. In the Configure Selector dialog box that appears, select a chart for filter interaction.

? Note Compound Query Control supports only filter interaction of charts from the same dataset. Cascade filtering is not supported.

| Configure Selector Datase | t 🗊 company_sales_re | | | | | | | × |
|-------------------------------|----------------------------------|-----------------|----------------------------------|-----------|------------|------------------------|-------------------|---------|
| Select Linked Chart | | | | | | | | |
| Current Dataset Select All | | | | | | Q Enter a tal | ble name | |
| Set Filter Conditions | | | | | | | | |
| Filtering Field | order_level | Field Name | order_level | Filter By | Conditions | ✓ Default ¹ | Value Default C V | / Value |
| And \lor – Filtering Field | area | Field Name | area | Filter By | Conditions | ∨ Default | Value Default C N | / Value |
| + Add Filterin | g Condition + Add Relation | onship | | | | | | |
| < | | | | | | | | > |
| Tips: The compound query cor | ntrol is only available to compu | ter clients and | is not displayed on Mobile clien | ts. | | | | |
| | | | | | | | Cancel | ОК |

- 6. In the **Configure Selector** dialog box, select filter fields.
 - i. Click Add Filtering Condition to add a filter condition under this level.
 - Search for or select a field for filtering, change Field Name, specify Filter By, and set Default Value.
 - If you want to delete a filter condition, click the Delete icon next to the filter condition.

ii. Click Add Relationship to add a relationship node to the inner layer of this level.



 Click the node of the first outer layer relationship and select a relationship type to replace the current relationship.

| Set Filter Conditions | | |
|-----------------------|---------------------------|--------------------|
| Filtering Field | order_level | Field Name order_I |
| Filtering Field | area | Field Name area |
| And 内面 And Or | + Add Filtering Condition | + Add Relationship |
| Or + Add Filterin | ng Condition + Add Re | lationship |

- If the relationship of the outer layer is And, the default relationship of the next layer is Or. If the relationship of the outer layer is Or, the default relationship of the next layer is And. The relationship types of the inner layer and its outer layer are opposite. They can be And-Or, Or-And, And-Or-And, or Or-And-Or.
- You can click the Delete icon to delete all filter fields and relationships for a node.



? Note You can add a maximum of three layers of relationship nodes for each link.

7. Click **OK** to complete the compound query configuration.

Example

• Filter by string

Data of the string type can be filtered in three methods: Enum - Single Choice, Enum - Multiple Choice, and Conditions.

- i. Click the Compound Query Control icon. On the Data tab, select a dataset.
- ii. Click **Configure Selector**. In the Configure Selector dialog box that appears, select a chart for filter interaction.
- iii. In the Set Filter Conditions section, set filter conditions.
 - Click Add Filtering Condition, set Filtering Field to area, Field Name to area, Filter By to Enum
 Single Choice, and Default Value to North.
 - Click Add Filtering Condition, set Filtering Field to order_level, Field Name to order_level, Filter By to Conditions, and Default Value to Matches, L1.

| Set Filter Conditions | | | | | | | | | | |
|------------------------|-------------|------------|-------------|-----------|----------------------|--------|---------------|-----------|-----|---|
| Filtering Field | area | Field Name | area | Filter By | Enum - Single Choice | \vee | Default Value | Northeast | | |
| And∨ — Filtering Field | order_level | Field Name | order_level | Filter By | Conditions | \sim | Default Value | Matches | ∨L1 | 1 |

- iv. Click OK.
- v. Click **Query** in the display area of the compound query control. All the charts that are filtered by the control are updated.

| | area | Cross Table-company | _sales_record_e | en_us | | |
|----|------------------|---------------------|-----------------|-------------|--------------|--------------------|
| | Northeast \lor | order_date(year) | area | order_level | order_number | order_amt |
| nd | order_level | 2013 | Center | L1 | 1417 | 102872.55899999996 |
| | Matches V L1 | 2013 | Center | L2 | 1478 | 93612.61599999997 |
| | | 2013 | Center | L3 | 1915 | 150849.037 |
| | Query | 2013 | Center | Others | 1184 | 44397.3075000001 |
| | | 2013 | East | L1 | 2939 | 234849.9260000006 |

Filter by data

- i. Click the Compound Query Control icon. On the Data tab, select a dataset.
- ii. Click **Configure Selector**. In the Configure Selector dialog box that appears, select a chart for filter interaction.
- iii. In the Set Filter Conditions section, set filter conditions.
 - Click Add Filtering Condition, set Filtering Field to order_number, Field Name to order_numb er, and Default Value to Greater Than, 30.
 - Click Add Filtering Condition, set Filtering Field to order_amt, Field Name to order_amt, and Default Value to Greater Than, 10000.

| And∨ — Filtering Field | order_number | Field Name | order_number | Default Value | Greate | ✓ |
|------------------------|-----------------------------|------------|--------------|---------------|--------|----------|
| Filtering Field | order_amt | Field Name | order_amt | Default Value | Greate | ∨ _10000 |
| + Add Filter | ing Condition + Add Relatio | nship | | | | |

iv. Click OK.

v. Click **Query** in the display area of the compound query control. All the charts that are filtered by the control are updated.

| | order_number | © 1 | Cross Table-comp | any_sales_record_en_ | us | |
|-----|----------------|-----|------------------|----------------------|--------------|--------------------|
| | Greate V 30 | | area | order_level | order_number | order_amt |
| And | order_amt | | Center | L1 | 197 | 67971.98 |
| | Greate V 10000 | | Center | L2 | 241 | 74472.7600000001 |
| | | | Center | L3 | 435 | 158767.9400000003 |
| | Query | | Center | Others | 201 | 61053.009999999995 |
| | | | East | L1 | 352 | 159485.04 |

(?) Note Only values of numeric fields can be filtered. The data is displayed based on the aggregate method selected for measures in a chart. Assume that the aggregate method of the order_number field in a cross table is sum. If you use the compound query control to filter data in which the number of orders is greater than 30, the cross table displays all data in which the number of orders is greater than 30 and the aggregate method is sum.

• Filter by date

Data of the date type can be filtered by using Shortcut or Filter By Date.

- i. Click the Compound Query Control icon. On the Data tab, select a dataset.
- ii. Click **Configure Selector**. In the Configure Selector dialog box that appears, select a chart for filter interaction.
- iii. Click Add Filtering Condition to set filter conditions.

(?) Note If you filter data of a certain period of time, you need to add a date filter field first, and set **Default Value** to Greater Than or Greater than or Equal To. Then, add the same date filter field, and set **Default Value** to Less than or Equal To or Less Than.

- Click Add Filtering Condition, set Filtering Field to report_date(year), Field Name to date, and Default Value to Greater Than, 2010.
- Click Add Filtering Condition, set Filtering Field to report_date(year), Field Name to date, and Default Value to Less than or Equal To, 2011.

| Set Filter Co | onditions | | | | | | | | | |
|---------------|-----------------|----------------------------|------------|------|-----------|----------------|--------|---------------|-----------------------|--------|
| | Filtering Field | report_date(year) | Field Name | date | Filter By | Filter by Date | \sim | Default Value | Greater Than | ~ |
| And∨ | Filtering Field | report_date(year) | Field Name | date | Filter By | Filter by Date | \sim | Default Value | Less than or Equal To | \sim |
| | + Add Filterin | ng Condition + Add Relatio | nship | | | | | | | |
| ? N | lote | | | | | | | | | |

- iv. Click OK.
- v. Click **Query** in the display area of the compound query control. All the charts that are filtered by the widget are updated.

| | date | | | Cross Table-company | _sales_record_en_ | us | | |
|-----|-------------|------|-----------------|---------------------|-------------------|--------------|--------------|--------------------|
| | Greater 🗸 🗸 | 2010 | | report_date(year) | area | order_level | order_number | order_amt |
| And | date | | | - | Central China | High_level | 3964 | 234428.0815000006 |
| | Less tha V | 2011 | (****) (***) | - | Central China | Low_level | 4305 | 279333.03649999993 |
| | | | | - | Central China | Middle_level | 6609 | 456098.126 |
| | Qu | Jery | | - | Central China | Other | 3544 | 197347 239 |
| | | | | | | | | > |

2.6.3. Text area

You can use a text area to enter text. For example, you can use this to create the report title.

- 1. Click the Text Area icon, and a text area appears in the dashboard display area.
- 2. Enter text, as shown in the following figure.



2.6.4. IFrame

You can use iFrames to insert required web pages to filter web data and browse web pages related to the current data in real time.

- 1. Click the IFrame icon, and an iFrame appears in the dashboard display area.
- 2. In the URL input box, enter the URL.

? Note You must use an https URL.

2.6.5.

| 1 | • |
|---|---|
| 2 | |

| Label ^ | | |
|-------------|--------------|---------|
| | Add Tab Page | |
| Tab 1 | | ¢⊗i≣ |
| Title | | |
| Tab 1 | | |
| Description | | |
| | | |
| Tab 2 | | 1 ั ♥ 🗊 |
| Title | | |
| Tab 2 | | |
| Description | | |
| | | |

3.





| Move To | | × |
|-------------|---------------|----|
| Container : | TabTest | ~ |
| Tab : | Select a tab. | ^ |
| | Tab 1 | |
| | Tab 2 | |
| | Cancel | OK |

5.

2.6.6. Image

- 1. Click the Image icon, and an image appears in the dashboard display area.
- 2. Enter the URL of the image.
- 3. Configure the style of the image, as shown in the following figure.

| Image | | | | | | | | | |
|-------|-------------------|--|--|--|--|--|--|--|--|
| | Style | | | | | | | | |
| URL | URL | | | | | | | | |
| | RL I | | | | | | | | |
| Ima | ge Display | | | | | | | | |
| | Select an option. | | | | | | | | |
| Нур | AutoFit | | | | | | | | |
| En | Tile | | | | | | | | |
| | Center | | | | | | | | |
| | Fill | | | | | | | | |
| | Stretch | | | | | | | | |

3.Manage dashboards

3.1. View, share, and transfer a dashboard, make it public, add it to favorites, and configure its security level

This topic describes how to view, share, and transfer a dashboard, make it public, add it to favorites, and configure its security level.

View a dashboard

- 1. Log on to the Quick BI console.
- 2. Click the Workspace tab. In the left-side navigation pane, click Dashboards.
- 3. On the **Dashboards** page, find the dashboard that you want to view and click the fee icon.
- 4. On the page that appears, you can perform the following operations:

>> 🗹 Edit 🛛 🖾 Export to Image 📄 Export to PDF

- Edit : click Edit to go to the chart edit page.
- Export to Image: Click Export to Image to export the chart data as an image.
- Export to PDF: click export to PDF to export the chart data in a PDF file.

Share a dashboard

- 1. Click **Workspace** in the top navigation bar. In the left-side navigation pane, click **Dashboards**.
- 2. On the Dashboards page, select a dashboard that you want to share with others and click the sicon in the Actions column.
- 3. Set Scope, Permission Type, and Expiration Date, as shown in the following figure.

| Share | |
|---------------------|--|
| Name : | gauge |
| * Scope : | All Users 💿 User Groups 🕓 Users |
| * Share With: | × |
| * Permission Type: | ○ View and Export ○ View Only |
| * Expiration Date : | Duration V Date |
| Note: | Three authorization levels coexist, and a user only requires |
| | one permission. |

- ? Note
 - In Quick BI Pro and Quick BI Enterprise Standard, you can share dashboards with specific user groups, specific users, or all users. In Quick BI Basic, you must specify individual users with whom to share dashboards.
 - A report can be downloaded only if **Allow Download** is selected and Permission Type is set to **View and Export**.
- 4. Click **Save** to share the dashboard.

Make a dashboard public

- 1. Click the **Workspace** tab. In the left-side navigation pane, click **Dashboards**.
- 2. On the Dashboards page, right-click the dashboard that you want to make public and select Make **Public**. You can also click the **public** icon in the Actions column and select Make Public.
- 3. In the Make Public pane, set Expiration Date and select Generate URL.

| Make Publ | ic | | | | | | |
|---|--|--|--|--|--|--|--|
| Security Level: | Public | | | | | | |
| Owner: | 1.000000000000000000000000000000000000 | | | | | | |
| Expiration Date: | 2020-10-21 | | | | | | |
| Generate URL: | | | | | | | |
| URL: | http://daily- oxs4.yunbi.biz.aliyun.test/token3rd/dashboard/view/pc.htm? p ad02c773bb7d&accessToken= 18ea Copy URL | | | | | | |
| Warning When you make a work publicly available, any user can use this URL to access your work. Use caution when performing this operation. | | | | | | | |

4. Click Make Public to make the dashboard public.

Rename a dashboard, transfer it to another user, or configure its security level

- 1. Click the **Workspace** tab. In the left-side navigation pane, click **Dashboards**.
- 2. On the Dashboards page, right-click the dashboard that you want to edit and select **Edit Properties**. You can also click the **a** icon in the Actions column.
- In the Edit Properties pane, you can rename the dashboard, transfer it to another user in the workspace, or change its security level. If the security level is set to Protected (Allow Other Workspace Members to Edit), other members in the workspace can edit the workbook. These members can use the lock function to prevent their changes from being overwritten by other users.

| Edit Propert | ies | |
|-----------------|---|----|
| * Name: | 运会费Text | |
| Owner: | 9094112100130210 | ×. |
| Description: | | |
| Security Level: | Private (Allow Only Workspace Owner to Edit) Protected (Allow Other Workspace Members to Edit) | |
| | | |

Note The dashboard transfer and security level setting functions are available only in Quick BI Pro and Quick BI Enterprise Standard workspaces.

Add a dashboard to favorites

- 1. Click the **Workspace** tab. In the left-side navigation pane, click **Dashboards**. You can use the following methods to add a dashboard to favorites:
 - On the Dashboards page, click the 🗼 icon next to the dashboard name.

| ndard 🧕 | Vou have added 222222222 | to favorites. Guide Subscriptions | | ¢. | ଷ 🛱 🃀 |
|------------------------------|--------------------------|--------------------------------------|--|--------------------|-----------------|
| ashboards All Items M | ly Items | Name 🗸 Q Tot | tal Files: 11 | + Create Dashboard | + Create Folder |
| Name 🜲 | | Created By 🜲 | Modified By/At | Туре | Actions |
| 国际化1.1.2 | | 500/112100152210 | 5094112100153210 1/10/2019, 22:35:10 | - | e ô |
| ★ <mark>.11</mark> 明示图Text ○ | | 5094112100153210 | 5094112100153210 4/22/2019, 11:16:39 | Standard | 12 II ~ I |

• On the dashboard edit page, click the 🐨 icon next to the dashboard name.



? Note You can click the Add to Favorites icon again to remove a dashboard from your favorites.

3.2. Save, save and publish, restore, unpublish, and republish a dashboard

This topic describes how to save, save and publish, restore, unpublish, and republish a dashboard. These features allow users to view only published dashboards. All modifications made by developers are invisible to users until they are published.

Prerequisites

You have logged on to the Quick BI console and created a dashboard. For more information, see Basic dashboard operations.

Context

Dashboards are published automatically after they are saved. If developers save modifications to the dashboards, users may view the intermediate versions that are generated. To improve user experience, the save feature is separated from the publish feature, and the unpublish and republish features are added.

Save a dashboard

The save feature saves only the current operation. New dashboards are not published after you save them. To publish a new dashboard, use the save and publish feature. If you want to update a published dashboard, republish it.

Save and publish a dashboard

The save and publish feature saves the current operation and publishes the dashboard. This feature is available only for dashboards that are not published.

Restore a dashboard

After you save your modifications to a published dashboard but have not yet published the modifications, you can use the **restore** feature to restore the dashboards to the latest version.

- 1. Select a published dashboard.
- 2. Modify the dashboard and save the modifications. The dashboard is in the **Saved But Not Published** state.
- 3. On the dashboard edit page, click the 🚦 icon and select **Restore**.



4. In the message that appears, click **OK**.

Unpublish a dashboard

You can unpublish a dashboard. Unpublished dashboards are invisible to users.

1. On the dashboard edit page, click the 🚦 icon and select **Unpublish**.

| Edit | | Preview | Save To Be Updated | |
|-------------|--------|-------------------|--------------------|-----------------------------|
| Save As | | Graphic Design | 🖬 Cha | nge Chart Type - |
| Make Public | | Data | Style | Advanced |
| Unpublish | 100155 | Data Source Type: | Dataset | |

2. In the message that appears, click OK.

Republish a dashboard

After you update a published dashboard, you can republish it to make the updates take effect. If "To Be Updated" is displayed for a dashboard and the dashboard is in the **Saved But Not Published** state, you can republish it



4.Create workbooks 4.1. Overview

Workbooks are available only in workspaces of Quick BI Pro and Quick BI Enterprise Standard. You cannot create workbooks in personal workspaces. You can add charts and query controls in workbooks only in Quick BI Enterprise Standard.

Workbook edit page

A workbook edit page consists of three sections:

- Dataset selection section
- Workbook configuration section
- Workbook display section

| < | \$ | 100 | | | * | | | | | | | | ê | <u>ዮ</u> « | | | Edit | P | review Save | Republish |
|-----|---------------|------------|----------------------|-----------|------|-------|-------------|------------|-------------|--------------|--------------|---|---|------------|-------|---|-----------------|----|----------------------------|--------------------------------|
| ile | Edit | Insert | Format | Data N | View | | | | | | | | | | | | | | | |
| | с р гр | 6 - 5 | ⊉ & ∣ | General – | | > ∣ c | Calibri 👘 1 | 4 - | | <u>€ A</u> - | <u>v</u> - 1 | | | Ξ- +- | ∃ r | | 88 I <u>1</u> 9 | | 🛷 🛛 山 Insert Chart | Q. Query Control 🔺 🛛 🔦 |
| | | | | | | | O Tine | u Ne guer | conditions | - | | | | | | | | R | ows | company_sales_rec \vee |
| | | | | | | | U nps | . No query | contaitions | · T | | | | | | Q | иегу | • | . customer_name | Q Search by keyword. |
| | Fx | | | | | | | | | | | | | | | | | s | ·· order_level | Dimensions |
| 4 | A | В | С | D | E | F | G | Н | 1 | J | K | L | M | N | 0 | Р | Q | | 1 | Str. customer_name |
| | 亩 pme | r_order_le | veorder_am | | t | | | | | | | | | | | | | C | olumns 3 | Str. order_level |
| | Ali | L1 | 64220.00 | | | | | | | | | | | | | | | - | | str. shipping_type |
| | Ali Ali | L2 | 124980.3 100947.5 | | | | | | | | | | | | | | | | <pre>order_amt(SUM)</pre> | o area |
| | Ali | 0thers | 130839.0 | | | | | | | | | | | | | | | N | <pre>back_point(SUM)</pre> | Str. province |
| | Barker | L1 | 68301.81 | | | | | | | | | | | | | | | | | str. city |
| | Barker | L2 | 251294.4 | | | | 2 | | | | | | | | | | | Fi | lters | Measures |
| | Barker | L3 | 58796.42 | 1.930000 | | | | | | | | | | | | | | | | - 🗁 Default |
| | Barker | Others | 108815.8 | | | | | | | | | | | | | | | | | |
| | | L1 | 64253.66 | | | | | | | | | | | | | | | | Aggregates Items | № order_number |
| | Barrett | L2 | 72273.86 | 2.51 | | | | | | | | | | | | | | | Aggregates tems | Nº order_amt |
| | | | | | | | | | | | | | | | | | | Re | ecords Displayed 1000 | Nº back_point |
| - | ≡ She | eet1 🗸 | | | | | | | | | | | | | | | | | Update | ∾ profit_amt <u>∾ price</u> |

- The workbook configuration section is marked as 1. In this section, you can select the chart that you want to create on the workbook, export and edit the workbook, configure the data format and style of the workbook, and add a query control.
- The workbook display section is marked as 2. In this section, you can display data in specified cells in a specified chart and reprocess data by using cell references.
- The dataset selection section is marked as 3. In this section, you can switch the current dataset to another. The fields of a dataset are displayed in the Dimensions and Measures lists based on the data types preconfigured in the system. You can select dimensions and measures based on the chart type.

4.2. Basic workbook operations

4.2.1. Create a workbook

This topic describes how to create a workbook based on a dataset.

Background information

If you want to perform complex operations on fields, such as **converting dimensions to measures**, **converting measures to dimensions**, **creating calculated measures**, and **creating hierarchies**, you must go to the dataset edit page.

For information about how to create a dataset, see Create a dataset.

After a dataset schema is changed, you must reload the workbook to view the new dataset schema. You can create workbooks only in group workspaces of Quick BI Pro and Quick BI Enterprise Standard.

Procedure

- 1. Log on to the Quick BI console.
- 2. Click the **Workspace** tab. In the left-side navigation pane, click **Workbooks**.
- 3. On the Workbooks page, click Create Workbook.
- 4. On the workbook edit page, click the 🂽 icon.

| 네 Insert Chart More Q Query Control 🗸 📢 | | | | | | | | |
|---|-----------------------|--|--|--|--|--|--|--|
| Rows | company_sales_rec 🔻 🛛 | | | | | | | |
| Double-click or drag-and-dr | Q Search by keyword. | | | | | | | |
| ti | Dimensions | | | | | | | |
| Columns | • | | | | | | | |
| Double-click or drag-and-dr | | | | | | | | |
| Filters | | | | | | | | |
| | Measures == | | | | | | | |
| Aggregates Items | | | | | | | | |
| Records Displayed 1000 | A CONTRACTOR | | | | | | | |
| Update | | | | | | | | |

5. Select a dataset. Add required fields in the Dimensions and Measures lists to the **Rows** and **Columns** fields.



6. Click Update.

The fields are displayed in the workbook display section.

| | وب لے | 6 - 9 | ¢ 🖉 | General – | | 0.> C | alibri 🕆 1 | 4 → B I <u>∪</u> S <u>A</u> → | │ <u>▲</u> ~ ⊟ ~ ⊞ ~ 53 │ Ξ |
|---|----------|-----------|------------|------------|---|-------|------------|---|-----------------------------|
| 1 | Fx | | | | | | | Rows | company_sales_rec ∨ |
| | А | В | С | D | E | F | G | | |
| 1 | customer | order_lev | /eorder_am | back_point | t | | | Str. customer_name | Q Search by keyword. |
| 2 | Ali | L1 | 64220.00 | 1.850000 | | | | Str. order level | Dimensions |
| 3 | Ali | L2 | 124980.3 | 2.460000 | | | | | |
| 4 | Ali | L3 | 100947.5 | 3.400000 | | | | ti | |
| 5 | Ali | Others | 130839.0 | 2.840000 | | | | Columns | str. order_level |
| 5 | Barker | L1 | 68301.81 | 1.350000 | | | | | str. shipping_type |
| 7 | Barker | L2 | 251294.4 | 4.660000 | | | | Nº order_amt(SUM) | 💿 area |
| 3 | Barker | L3 | 58796.42 | 1.930000 | | | | Nº back_point(SUM) | |
| Э | Barker | Others | 108815.8 | 1.690000 | | | | | Measures == |
| 0 | Barrett | L1 | 64253.66 | 1.710000 | | | | The second se | |
| 1 | Barrett | L2 | 72273.86 | 2.51 | | | | Aggregates Items | № back_point |
| | | | | | | | | Records Displayed 1000 | № profit_amt |
| | | | | | | | | | Nº price |

Note If you want to exchange rows and columns, you can click the icon, and then click Update.

7. Click Save.

Note If it is the first time that you save the workbook, the **Save Workbook** dialog box appears. You must configure the following parameters in the dialog box.

| Parameter | Description |
|-----------|---|
| Name | The name of the workbook. |
| Save To | The location where you want to save the workbook. |

8. Click OK.

4.2.2. Configure a workbook

You can configure a workbook in the workbook configuration section.

Prerequisites

You have logged on to the Quick BI console and created a workbook. For more information, see Create a workbook.

File

After you edit a workbook, you can click File and then click Export to export the workbook.

Edit

You can perform the following edit operations:

• Undo

- Restore
- Copy
- Cut
- Paste
- Format Painter
- Clear Format
- Indent
- Unindent

Insert

You can perform the following insert operations:

- Insert rows or columns to a workbook.
 - Insert rows above
 - Insert rows below
 - Insert columns to the left
 - Insert columns to the right
- Insert a dataset to a workbook.
- Insert a chart to a workbook.

You can insert the following types of charts: line chart, vertical bar chart, pie chart, gauge, radar chart, scatter chart, funnel chart, and polar diagram. For more information, see Insert a chart.

• Insert an image to a workbook.

The supported image formats include PNG, JPG, and GIF.

• Insert a function to a workbook.

For more information, see Workbook functions.

- Insert a hyperlink to a workbook.
- Insert remarks to a workbook.
- Insert a drop-down list box to a workbook.

For more information, see Add a drop-down list box.

Format

| ltem | Description |
|--|--|
| Data Format | Set the data format. The options include General, Date, Number, Text, Percentage, and Custom. |
| Font and Font Size | Set the font and font size. |
| Bold, Italic, Underline and Strikethrough | Configure the text style. |
| Horizontal Align, Vertical Align, Wrap Text, Merge Cells, Set Row Height, Set Column Width, Adaptive Row Height, and Adaptive Column Width | Configure the cell style. |

| ltem | Description |
|------------------------|---|
| Conditional Formatting | Add rules to filter data results. For more information, see Conditional Formatting. |

Data

You can perform the following operations on the data in a workbook:

- Sort
- Filter
- Search Data
- Group and Ungroup

View

You can perform the following operations on the data in a workbook:

- Show or hide gridlines
- Hide selected rows or columns
- Unhide
- Freeze to the current row or column
- Cancel freeze

Toolbar

You can perform the following operations on the data in a workbook.

| Operation | Description |
|--------------|---|
| 6 | Paste data with custom formatting. |
| P | Copy all of the formatting from one object and apply it to another one. |
| < | Clear the formatting. |
| <0 0> | Decrease or increase decimal places. |
| <u>A</u> | Specify the font color. |
| <u>&</u> | Specify the fill color for cells. |
| | Specify whether to show cell borders and the border color. |
| | Specify the theme color of the workbook. |

| Operation | Description |
|---------------------|-------------------------------------|
| <u>2</u> | Search for data. |
| Hand Theme Settings | Specify the theme style of a table. |
| Query Control | Add a query control |

Sheet settings

You can perform the following operations on a sheet in a workbook:

- Rename the sheet.
- Delete the sheet.
- Set the border color.
- Hide the sheet.

Conditional Formatting

You can click **Conditional Formatting** in the toolbar and add rules to filter the data results, such as highlighting the data within a specified range, setting an icon for specified data, and adding a data bar.

| С | Conditional Formatting × | | | | | | | | | |
|---|--------------------------|----------|--------|-----------|-----------------|---------|--|--|--|--|
| D | ata Area | | | | | | | | | |
| | Range | Workshee | et1 O6 | : 06 | | ▦ | | | | |
| S | elect a f | ormat | | 靣 Clear (| Conditional For | matting | | | | |
| | 🔽 Hi | ghlight | |] lcon | 🗌 Data B | ar | | | | |
| | Numer | ic Equal | ſo ∨ | | | | | | | |
| | Text C. | 🔺 | | | | | | | | |
| | Cell | ð | | | | | | | | |

Add a drop-down list box

- 1. In the toolbar on the workbook edit page, click Insert and select Drop-Down List.
- 2. In the Drop-Down List Settings dialog box, add a label for the data item.

| Drop-Down List Settings × | | | | | | | |
|---------------------------|--|---|--|--|--|--|--|
| | | | | | | | |
| * Label: | Separate multiple values with commas (,). | | | | | | |
| Values: | Separate multiple values with commas (,), such a | 5 | | | | | |
| | Cancel OK | | | | | | |

ONOTE Separate multiple labels with commas (,).

3. Click OK.

| • | 1 |
|--------|---|
| L1 | I |
| L2 | |
| L3 | |
| Others | |

? Note If the message This operation is not allowed because it may affect the data of nearby datasets. appears, copy the data to another area in the workbook and then repeat the operations.

Insert a chart

You can insert charts to a workbook based on the data in the workbook. You can insert the following types of charts: line chart, vertical bar chart, pie chart, gauge, radar chart, scatter chart, funnel chart, and polar diagram.

1. In the toolbar of the workbook edit page, click **Insert** and select Charts, and then select a chart type.

In this example, Pie Chart is selected.

| Insert Chart More |
|---------------------|
| Line Chart |
| ~ |
| Vertical Bar Chart |
| dh |
| Pie Chart |
| |
| Gauge |
| <u>()</u> |
| Radar Chart |
| |
| Scatter Chart |
| |
| Funnel Chart |
| |

2. In the Select Area dialog box, specify the data range for creating the chart.

| Select | Area | | | | \times |
|-----------|------|--|--------|----|----------|
| Sheet1!\$ | B\$4 | | | | |
| Ō | | | Cancel | ОК | |
| 2009 | 7841 | | | | |
| 2010 | 8349 | | | | |
| 2011 | 8025 | | | | |
| 2012 | 7840 | | | | |

3. Click OK. A pie chart appears in the workbook.



Click the chart and configure the chart style in the **Chart Design** section on the right side. For more information, see Create a dashboard.

4.2.3. Add a query control

This topic describes how to add a query control to filter your data. This feature is available only in Quick BI Enterprise Standard.

Prerequisites

A workbook is created. For more information, see Create a workbook.

Context

A workbook can have only one query control. You can configure multiple filter conditions in the query control.

Procedure

- 1. Log on to the Quick BI console.
- 2. Click the Workspace tab. In the left-side navigation pane, click Workbooks.
- 3. On the **Workbooks** page, click the workbook to go to the workbook edit page. You can also click the **Edit** icon in the **Actions** column.
- 4. On the workbook edit page, click Query Control in the toolbar.

| File Edit | Insert Format Data View | | | | | | | | | |
|-----------|-------------------------|---------------------|-----------------|-------------------------------|------------------|-------|---|------------------------------|-------------------|---|
| ا «ا ا | 🖻 - 🖻 🖉 🛛 General - 🔍 | 0 0> Calibri - 14 - | B: I U 4 | S <u>A</u> - <u>&</u> - | ⊞ × ⊞ × 83 Ξ × | | | 🖾 🛷 More | Q Query Control 🔶 | • |
| | | | | _ | | | | Rows | testlxt001 | ~ |
| | | 🧿 Tips: No qu | ery conditions. | + | | Query | Θ | Double-click or drag-and-dro | | 5 |

- 5. In the workbook display section, click the + icon.
- 6. In the Set Query Conditions dialog box, configure query conditions.

For more information, see Create a query control.

| Query Condition Associated ChartsQ Total 1 Charts If order_level Select All Clear Selected Fields Basic Configuration Display Mo Display Mo Source Auto Parsing Very Storder_level Source Auto Parsing Storder_level Set Default Filter Value Storder_level | Set Query Conditior | ıs | | | View Opera | tions Guide> X |
|--|---------------------|----|------------|-----------------------|---|----------------|
| | Query Condition | + | Select All | Clear Selected Fields | Query Condition Configuration Basic Configuration Display Mo Drop-Down List (Former "By V Source Auto Parsing Single Dataset Max Query Method Single Multiple | Require |
| | | | | | Set Deradut Finter Value | |

7. Click OK.

Quick BI

| order_level | 2 亩 |
|-------------------------|--------|
| | \sim |
| Q Search by name | - |
| L1 | |
| L2 | |
| L3 | ć |
| Others | 0 |

Result

Select L2 for order_level and click Query. The following figure shows the query result.

| orde | er_level | | | | | | | | | | | | |
|------|------------------|-------|--------|----------|------------|---|---|---|---|---|---|---|-------|
| L2 | 2 | | | \sim | | | | | | | | | Query |
| C6 | F _x 4 | 1720. | 35099 | 999998 | | | | | | | | | |
| | A | I | В | С | D | E | F | G | Н | I | J | К | L |
| 1 | customer | orde | r_leve | order_am | back_point | | | | | | | | |
| 2 | Ali | L2 | | 124980.3 | 2.460000 | | | | | | | | |
| 3 | Barker | L2 | | 251294.4 | 4.660000 | | | | | | | | |
| 4 | Barrett | L2 | | 72273.86 | 2.510000 | | | | | | | | |
| 5 | Beirne | L2 | | 94876.11 | 1.290000 | | | | | | | | |
| 6 | Bishop | L2 | | 41720.35 | 2.170000 | | | | | | | | |
| 7 | Blake | L2 | | 70048.66 | 1.920000 | | | | | | | | |
| 8 | Butt | L2 | | 137263.1 | 2.950000 | | | | | | | | |
| 9 | Cardy | L2 | | 51924.51 | 1.870000 | | | | | | | | |
| 10 | Clark | L2 | | 30389.58 | 1.430000 | | | | | | | | |

4.3. Search for, move, and delete a workbook

This topic describes how to search for, move, and delete a workbook.

Search for a workbook

- 1. Log on to the Quick BI console.
- 2. Click the **Workspace** tab. In the left-side navigation pane, click **Workbooks**.
- 3. On the **Workbooks** page, enter the keywords or the creator of the workbook that you want to search for in the search box, and click the **search** icon.

You can specify **Publish Status** to narrow the search range.

| Workbooks All Items My Items | Name A Q Total Files: 3 | + Create Workbook | + Create Folder |
|------------------------------|-------------------------|---------------------|-----------------|
| Name 🗘 | Name ed By 🌲 | Modified By/At | Actions |
| * 😸 Umblied 👳 | Created By | | |
| * | | 1/10/2019, 22:35:49 | |

Move a workbook

1. On the **Workbooks** page, find the workbook that you want to move, click the **i** icon in the **Actions** column, and then select **Move To**.

You can also right-click the row of the workbook and select Move To.

2. In the Move To pane, select the destination directory and click Save.



Delete a workbook

1. On the **Workbooks** page, find the workbook that you want to delete, click the i icon in the **Actions** column, and then select **Delete**.

You can also right-click the row of the workbook and select **Delete**.

2. In the dialog box that appears, click **OK**.

| ? | Are you sure that you want t Workbook? | to delete this | | |
|---|---|----------------|----|--|
| | | Cancel | OK | |

Note If you want to delete a workbook that is in the **Published** status, you must unpublish it first.

4.4. Save, save and publish, restore, unpublish, and republish a workbook

This topic describes how to save, save and publish, restore, unpublish, and republish a workbook. These features allow users to view only published workbooks. All changes made by developers are invisible to users until they are published.

Prerequisites

You have logged on to the Quick BI console and created a workbook. For more information, see Create a workbook.

Context

Workbooks are automatically published after they are saved. Users may view intermediate versions that are generated as developers save changes to the workbooks. To improve user experience, the save feature is separated from the publish feature, and the unpublish and republish features are added.

Save a workbook

You can save only the current operation by using the save feature.

- After you create a workbook and save it, the workbook is not published. You can use the **save and publish** feature to publish a newly created workbook.
- After you modify a published workbook, you can use the **republish** feature to republish the workbook.

Save and publish a workbook

You can use this feature to save the current operation and publish the workbook. This feature is available only for workbooks that are not published.

Restore a workbook

If you save your modifications to a published workbook but have not published the modifications, you can use the restore feature to restore the workbook to the latest published version.

Onte This feature is supported only by published workbooks.

For example, an employee publishes a workbook and the manager gives some comments. However, after the employee makes modifications based on the comments of the manager, the manager prefers the previous version. In this case, the employee needs to restore the workbook to the previously published version. To restore a workbook, perform the following operations:

1. On the workbook edit page, click the 🚦 icon in the top menu bar and select **Restore**.



2. In the message that appears, click **OK**.

Unpublish a workbook

You can unpublish a workbook. After the workbook is unpublished, it is invisible to users.

1. On the workbook edit page, click the **s** icon and select **Unpublish**.



2. In the message that appears, click OK.

Republish a workbook

After you update a published workbook, you can republish it to make the updates available for users. You can republish a workbook if "To Be Updated" is displayed and the state of the workbook is **Saved But Not Published**.



4.5. Share a workbook, make it public, transfer it, rename it, change its security level, or add it to favorites

You can collaborate with others to prepare a workbook. After the workbook is prepared, you can share it with others, make it public, transfer it to another user, rename it, change its security level, or add it to favorites.

Share a workbook

Only workbooks whose Publish Status is Published can be shared with others.

- 1. Log on to the Quick BI console.
- 2. Click **Workspace** in the top navigation bar. In the left-side navigation pane, click **Workbooks**.
- 3. On the **Workbooks** page, find the workbook that you want to share with others and click the equipment icon in the **Actions** column.

You can also right-click the row of the workbook and select **Share**.

4. In the Share pane, configure Scope, Permission Type, and Expiration Date.

| Share | |
|---------------------|--|
| Name : | |
| * Scope : | O All Users O User Groups O Users |
| * Permission Type: | ○ View and export ○ View only |
| * Expiration Date : | Duration V Date |
| Note: | Three authorization levels coexist, and a user only requires |
| | one permission. |
| | |

⑦ Note Set Scope to All Users, User Groups, or Users as required.

5. Click Save.

Make a workbook public

Only workbooks whose Publish Status is Published can be made public.

1. On the **Workbooks** page, find the workbook that you want to make public, click the i icon in the **Actions** column, and then select **Make Public**.

You can also right-click the row of the workbook and select Make Public.

2. In the Make Public pane, set Expiration Date and select Generate URL.

| Make Publ | ic | | |
|------------------|-----------------------|--|----------------------------------|
| Security Level: | Public | | |
| Owner | | | |
| Expiration Date: | 2020-10-20 | | |
| Generate URL: | | | |
| URL | http:/ id=16 | - | v.htm? |
| | 4fc9a 6f0 Copy URL | | ef3759 |
| | | y available, any user ca erforming this operati | an use this URL to access on. |
| | | | |
| Clos | se | Make Public | Make Private |

3. Click Make Public.

Transfer a workbook, rename a workbook, and change its security level

1. On the **Workbooks** page, find the required workbook and click the **a** icon in the **Actions** column.

You can also right-click the row of the workbook and select Edit Properties.

2. In the Edit Properties pane, change the name, owner, description, and security level of the workbook.

If you select **Protected (Allow Other Workspace Members to Edit)** for Security Level, you must lock the workbook before you edit it.

| Edit Propert | ies | |
|-----------------|---|--|
| * Name: | 未命名 | |
| Owner: | · · · · · · · · · · · · · · · · · · · | |
| Description: | | |
| Security Level: | Private (Allow Only Workspace Owner to Edit) Protected (Allow Other Workspace Members to Edit) | |
| | Cancel Save | |

Add a workbook to favorites

You can use any of the following methods to add a workbook to favorites:

• On the Workbooks page, click the Add to Favorites icon next to the workbook name.

| Q | | My Items | workspace | You Guide | have added | i to fa | |
|-----------|-----------|----------|-----------|--------------|------------|---------|--------|
| Workbooks | All Items | My Items | | | All Status | ⊻ Na | me ∨Q⊺ |
| Name 💂 | | | | | | | |
| | | | | | | | |
| * 📚 🚥 • | | | | | | | |

• On the workbook edit page, click the Add to Favorites icon next to the workbook name.

Note You can click the Add to Favorites icon again to remove the workbook from your favorites.

4.6. Manage workbook folders

On the workbooks page, you can create, rename, and delete a workbook folder.

Create a workbook folder

- 1. Log on to the Quick BI console.
- 2. Click Workspace in the top navigation bar. In the left-side navigation pane, click Workbooks.
- 3. On the Workbooks page, click Create Folder.

| := | Workbooks All Items My Items | Name V Q Total Files: 1 | + Create Workbook | + Create Folder |
|--------------------------|------------------------------|-------------------------|-------------------|-----------------|
| ₩ ~ ~ | Name 🛊 | Created By 🚖 | Modified By/At | Actions |
| BI Portals | V313 | 10000000000 | 0.000 | E ti |
| Dashboards Workbooks | * 😆 WorkBookTest • | | | |

4. In the Create Folder dialog box, enter a workbook name and click OK.

Rename a workbook folder

1. On the **Workbooks** page, find the folder that you want to rename and click the 📑 icon in the **Actions** column.

You can also right-click the row of the folder and select Rename.

2. In the Rename dialog box, enter a new name for the folder and click OK.

| := | Workbooks All Items My It | Rename | × | ✓ Q Total Files: 1 | + Create Workbook | + Create Folder |
|---------------------------|---------------------------|--------------|----|--------------------|---|-----------------|
| //// 0919_workspace 🛛 🗢 – | Name 븆 | | | Created By 🖨 | | |
| BI Portals | VII3 | * Name: V313 | | 5954012100150218 | 9894112100150218 1/00/2022 2244612 | |
| Workbooks | * 😸 WorldonkText = | Cancel | ОК | 5954012100150218 | 9894112108153218 12/17/2818, 36/3842 | |

Delete a workbook folder

 On the Workbooks page, find the folder that you want to delete and click the micron in the Actions column.

You can also right-click the row of the folder and select **Delete**.

2. In the message that appears, click OK.

| := | Workbooks All Items My | | ✓ Q Total Files: 1 | + Create Workbook | + Create Folder |
|--------------------------|------------------------|---|-------------------------|-------------------|-----------------|
| ⑧ 0919_workspace ♀ ▼ | Name 🖨 | O Are you sure that you want to delete this folder? | Created By 🜲 | | |
| BI Portals | in an | Cancel OK | 5 | | |
| Dashboards Workbooks | * 📚 Manifaction v | | 50000.00100000000000000 | | |

4.7. Workbook functions

Database functions

DAVERAGE: returns the average of selected database entries.

DCOUNT: counts the cells that contain numbers in a database.

DCOUNTA: counts non-blank cells in a dat abase.

DGET: extracts a single record that matches the specified criteria from a database.

DMAX: returns the maximum value from selected database entries.

DMIN: returns the minimum value from selected database entries.

DPRODUCT: multiplies the values in a field for records that match the specified criteria in a database.

DST DEV: estimates the standard deviation based on a sample of selected database entries.

DST DEVP: calculates the standard deviation based on the entire population of selected database entries.

DSUM: adds the numbers in a field for records that match the specified criteria in a database.

DVAR: estimates variance based on a sample of selected database entries.

DVARP: calculates variance based on the entire population of selected database entries.

GET PIVOT DATA: returns data stored in a pivot table.

Date and time functions

DATE: returns a date.

DATEDIF: calculates the number of days, months, or years between two dates.

DATEVALUE: converts a date in text format to a serial number.

DAY: returns the day of a date. The day is given as an integer ranging from 1 to 31.

DAYS360: returns the number of days between two dates based on a 360-day year (twelve 30-day months), which is used in some accounting calculations. You can use this function to compute payments if your accounting system is based on twelve 30-day months.

EDATE: returns a date that is a specified number of months before or after the specified start date. You can use this function to calculate maturity dates or due dates that fall on the same day of a month as the date of issue. EOMONT H: returns the last day of a month that is a specified number of months before or after the specified start date. You can use this function to calculate maturity dates or due dates that fall on the last day of a month.

HOUR: returns the hour of a time value. The hour is given as an integer ranging from 0 (12:00 A.M.) to 23 (11:00 P.M.).

MINUTE: returns the minutes of a time value. The minute is given as an integer ranging from 0 to 59.

MONT H: returns the month of a date. The month is given as an integer ranging from 1 (January) to 12 (December).

NET WORKDAYS: returns the number of working days between the specified start date and end date. Working days exclude weekends and any specified holidays. You can use this function to calculate employee benefits that accrue based on the number of working days during a specific period.

NETWORKDAYS.INTL: returns the number of working days between two dates.

NOW: returns the current date and time. If the cell format is general before you enter this function, it changes to time for the result of this function.

SECOND: returns the seconds of a time value. The second is given as an integer ranging from 0 (zero) to 59.

TIME: returns the decimal for a time. If the cell format is general before you enter this function, it changes to time for the result of this function.

TIMEVALUE: returns the decimal of a time represented by a text string. The decimal is a value ranging from 0 (zero) to 0.999999999, which represents a time from 0:00:00 (12:00:00 A.M.) to 23:59:59 (11:59:59 P.M.).

TODAY: returns the current date. If the cell format is general before you enter this function, it changes to date for the result of this function.

WEEKDAY: returns the day of the week corresponding to a date. The day is given as an integer ranging from 1 (Sunday) to 7 (Saturday) by default.

WEEKNUM: returns an integer that represents the week number of a specific date in a year.

WORKDAY: returns a date that is a specified number of working days before or after the specified start date. Working days exclude weekends and any specified holidays. You can use this function to exclude weekends or holidays when you calculate invoice due dates, expected delivery time, or the number of working days.

WORKDAY.INTL: returns a date before or after a specified number of working days, where weekends can be customized.

YEAR: returns the year corresponding to a date. The year is returned as an integer ranging from 1900 to 9999.

YEARFRAC: calculates the fraction of a year represented by the number of days between the specified start date and end date. You can use this function to identify the proportion of benefits or obligations during a specific period to those in a whole year.

Engineering functions

BESSELI: returns the modified Bessel function In(x).

BESSELJ: returns the Bessel function Jn(x).

BESSELK: returns the modified Bessel function Kn(x).

BESSELY: returns the Bessel function Yn(x). BIN2DEC: converts a binary number to decimal. BIN2HEX: converts a binary number to hexadecimal. BIN2OCT: converts a binary number to octal. COMPLEX: converts real and imaginary coefficients to a complex number. CONVERT: converts a number from one measurement system to another. DEC2BIN: converts a decimal number to binary. DEC2HEX: converts a decimal number to hexadecimal. DEC2OCT: converts a decimal number to octal. DELTA: tests whether two values are equal. ERF: returns the error function. ERF.PRECISE: returns the error function. ERFC: returns the complementary error function. ERFC.PRECISE: returns the complementary ERF function integrated between x and infinity. GESTEP: tests whether a number is greater than a threshold value. HEX2BIN: converts a hexadecimal number to binary. HEX2DEC: converts a hexadecimal number to decimal. HEX2OCT: converts a hexadecimal number to octal. IMABS: returns the absolute value (modulus) of a complex number. IMAGINARY: returns the imaginary coefficient of a complex number. IMARGUMENT: returns the argument theta, which is an angle expressed in radians. IMCONJUGATE: returns the complex conjugate of a complex number. IMCOS: returns the cosine of a complex number. IMDIV: returns the quotient of two complex numbers. IMEXP: returns the exponential of a complex number. IMLN: returns the natural logarithm of a complex number. IMLOG10: returns the base-10 logarithm of a complex number. IMLOG2: returns the base-2 logarithm of a complex number. IMPOWER: returns a complex number raised to an integer power. IMPRODUCT: returns the product of 1 to 255 complex numbers. IMREAL: returns the real coefficient of a complex number. IMSIN: returns the sine of a complex number. IMSQRT: returns the square root of a complex number. IMSUB: returns the difference between two complex numbers. IMSUM: returns the sum of complex numbers.

OCT2BIN: converts an octal number to binary.

OCT 2DEC: converts an octal number to decimal.

OCT 2HEX: converts an octal number to hexadecimal.

Financial functions

ACCRINT: returns the accrued interest for a security that pays periodic interest.

ACCRINTM: returns the accrued interest for a security that pays interest at maturity.

AMORDEGRC: uses a depreciation coefficient to return the depreciation for each accounting period.

AMORLINC: returns the depreciation for each accounting period.

COUPDAYBS: returns the number of days from the beginning of the current coupon period to the settlement date.

COUPDAYS: returns the number of days in the coupon period that contains the settlement date.

COUPDAYSNC: returns the number of days from the settlement date to the next coupon date.

COUPNCD: returns the next coupon date after the settlement date.

COUPNUM: returns the number of coupons payable between the settlement date and maturity date.

COUPPCD: returns the previous coupon date before the settlement date.

CUMIPMT: returns the cumulative interest paid between two periods.

CUMPRINC: returns the cumulative principal paid on a loan between two periods.

DB: uses the fixed-declining balance method to return the depreciation of an asset for a specified period.

DDB: uses the double-declining balance method or some other specified methods to return the depreciation of an asset for a specified period.

DISC: returns the discount rate for a security.

DOLLARDE: converts a dollar price, expressed as a fraction, to a dollar price, expressed as a decimal.

DOLLARFR: converts a dollar price, expressed as a decimal, to a dollar price, expressed as a fraction.

DURATION: returns the annual duration of a security with periodic interest payments.

EFFECT: returns the effective annual interest rate.

FV: returns the future value of an investment.

FVSCHEDULE: returns the future value of an initial principal after applying a series of compound interest rates.

INTRATE: returns the interest rate for a fully invested security.

IPMT: returns the interest payment for an investment for a given period.

IRR: returns the internal rate of return for a series of cash flows.

ISPMT: calculates the interest paid during a specific period of an investment.

MDURATION: returns the Macauley modified duration for a security with an assumed face value of USD 100.

MIRR: returns the internal rate of return where positive and negative cash flows are financed at different rates.

NOMINAL: returns the annual nominal interest rate.

NPER: returns the number of periods for an investment.

NPV: returns the net present value of an investment based on a series of periodic cash flows and a discount rate.

ODDFPRICE: returns the price per USD 100 face value of a security with an odd first period.

ODDFYIELD: returns the yield of a security with an odd first period.

ODDLPRICE: returns the price per USD 100 face value of a security with an odd last period.

ODDLYIELD: returns the yield of a security with an odd last period.

PMT: returns the periodic payment for an annuity.

PPMT: returns the payment on the principal for an investment for a given period.

PRICE: returns the price per USD 100 face value of a security that pays periodic interest.

PRICEDISC: returns the price per USD 100 face value of a discounted security.

PRICEMAT: returns the price per USD 100 face value of a security that pays interest at maturity.

PV: returns the present value of an investment.

RATE: returns the interest rate per period of an annuity.

RECEIVED: returns the amount received at maturity for a fully invested security.

SLN: returns the straight-line depreciation of an asset for one period.

SYD: returns the sum-of-years' digits depreciation of an asset for a specified period.

TBILLEQ: returns the bond-equivalent yield for a Treasury bill.

TBILLPRICE: returns the price per USD 100 face value for a Treasury bill.

TBILLYIELD: returns the yield for a Treasury bill.

VDB: uses a declining balance method to return the depreciation of an asset for a specified or partial period.

XIRR: returns the internal rate of return for a schedule of cash flows, which is not necessarily periodic.

XNPV: returns the net present value for a schedule of cash flows, which is not necessarily periodic.

YIELD: returns the yield on a security that pays periodic interest.

YIELDDISC: returns the annual yield for a discounted security, such as a Treasury bill.

YIELDMAT: returns the annual yield of a security that pays interest at maturity.

Information functions

CELL: returns information about the format, location, or content of a cell. ERROR.TYPE: returns a number corresponding to an error type. INFO: returns information about the current operating environment. ISBLANK: returns TRUE if the value is blank. ISERR: returns TRUE if the value is any error value except #N/A. ISERROR: returns TRUE if the value is any error value. ISEVEN: returns TRUE if the number is even. ISLOGICAL: returns TRUE if the value is a logical value. ISNA: returns TRUE if the value is the error value #N/A. ISNONTEXT: returns TRUE if the value is not text. ISNUMBER: returns TRUE if the value is a number. ISODD: returns TRUE if the number is odd. ISREF: returns TRUE if the value is a reference. ISTEXT: returns TRUE if the value is text. N: returns a value converted to a number. NA: returns the error value #N/A. TYPE: returns a number indicating the data type of a value. FORMULATEXT: returns a formula as a string.

Logical functions

AND: returns TRUE if all of its arguments are TRUE.
FALSE: returns the logical value FALSE.
IF: specifies a logical test to perform.
IFERROR: returns a value that you specify if a formula evaluates to an error.
NOT: reverses the logic of its argument.
OR: returns TRUE if any argument is TRUE.
TRUE: returns the logical value TRUE.

Lookup and reference functions

ADDRESS: returns a reference as text to a single cell in a worksheet.

AREAS: returns the number of areas in a reference.

CHOOSE: chooses a value from a list of values.

AGGREGATE: returns an aggregate in a list or database.

COLUMN: returns the column number of a reference.

COLUMNS: returns the number of columns in a reference.

HLOOKUP: searches for a value in the top row of an array and returns the value of a cell in the same column.

HYPERLINK: creates a shortcut that jumps to another location or opens a document stored on a network server, an intranet, or the Internet.

INDEX (Array): uses an index to choose a value from an array.

INDEX (Reference): uses an index to choose a value from a reference.

INDIRECT: returns a reference indicated by a text value.

LOOKUP (Array): searches for values in an array.

LOOKUP (Vector): searches for values in a vector.

MATCH: searches for values in a reference or array.

OFFSET: returns a reference offset from a given reference.

ROW: returns the row number of a reference.

ROWS: returns the number of rows in a reference.

TRANSPOSE: returns the transpose of an array.

VLOOKUP: searches for a value in the first column of an array and returns the value of a cell in the same row.

Math and trigonometry functions

ABS: returns the absolute value of a number.

ACOS: returns the arccosine of a number.

ACOSH: returns the inverse hyperbolic cosine of a number.

AGGREGATE: returns an aggregate in a list or database.

ASIN: returns the arcsine of a number.

ASINH: returns the inverse hyperbolic sine of a number.

ATAN: returns the arctangent of a number.

ATAN2: returns the arctangent from x- and y-coordinates.

ATANH: returns the inverse hyperbolic tangent of a number.

CEILING: rounds a number to the nearest integer or to the nearest multiple of significance.

CEILING.PRECISE: returns a number that is rounded up to the nearest integer or to the nearest multiple of significance.

COMBIN: returns the number of combinations for a given number of objects.

COS: returns the cosine of a number.

COSH: returns the hyperbolic cosine of a number.

DEGREES: converts radians to degrees.

EVEN: rounds a number up to the nearest even integer.

EXP: returns e raised to the power of a given number.

FACT: returns the factorial of a number.

FACT DOUBLE: returns the double factorial of a number.

FLOOR: rounds a number down, towards zero, to the nearest multiple of significance.

FLOOR.PRECISE: returns a number that is rounded down to the nearest integer or to the nearest multiple of significance.

GCD: returns the greatest common divisor.

INT: rounds a number down to the nearest integer.

ISO.CEILING: returns a number that is rounded up to the nearest integer or to the nearest multiple of significance.

LCM: returns the least common multiple.

LN: returns the natural logarithm of a number. LOG: returns the logarithm of a number to a specified base. LOG10: returns the base-10 logarithm of a number. MDET ERM: returns the matrix determinant of an array. MINVERSE: returns the matrix inverse of an array. MMULT: returns the matrix product of two arrays. MOD: returns the remainder from division. MROUND: returns a number rounded to the desired multiple. MULT INOMIAL: returns the multinomial of a set of numbers. ODD: rounds a number up to the nearest odd integer. PI: returns the value of pi. POWER: returns the result of a number raised to a power. PRODUCT: multiplies its arguments. QUOTIENT: returns the integer portion of a division. RADIANS: converts degrees to radians. RAND: returns a random number between 0 and 1. RANDBET WEEN: returns a random number between specified numbers. ROMAN: converts an Arabic numeral to Roman in text format. ROUND: rounds a number to a specified number of digits. ROUNDDOWN: rounds a number down, towards zero. ROUNDUP: rounds a number up, away from zero. SERIESSUM: returns the sum of a power series based on the formula. SIGN: returns the sign of a number. SIN: returns the sine of the given angle. SINH: returns the hyperbolic sine of a number. SQRT: returns a positive square root. SQRTPI: returns the square root of a number multiplied by pi. SUBTOTAL: returns a subtotal in a list or database. SUM: adds its arguments. SUMIF: adds the cells specified by the given criteria. SUMIFS: adds the cells that meet multiple criteria in a range. SUMPRODUCT: returns the sum of the products of corresponding array components. SUMSQ: returns the sum of the squares of arguments. SUMX2MY2: returns the sum of the difference of squares of corresponding values in two arrays. SUMX2PY2: returns the sum of the sum of squares of corresponding values in two arrays.
SUMXMY2: returns the sum of squares of differences of corresponding values in two arrays.

TAN: returns the tangent of a number.

TANH: returns the hyperbolic tangent of a number.

TRUNC: truncates a number to an integer.

Statistical functions

AVEDEV: returns the average of the absolute deviations of data points from their mean.

AVERAGE: returns the average of its arguments.

AVERAGEA: returns the average of its arguments, including numbers, text, and logical values.

AVERAGEIF: returns the average (arithmetic mean) of all cells that meet the given criteria in a range.

AVERAGEIFS: returns the average (arithmetic mean) of all cells that meet multiple criteria.

BETA.DIST: returns the beta cumulative distribution function.

BETA.INV: returns the inverse of the cumulative distribution function for a specified beta distribution.

BETADIST: returns the beta cumulative distribution function.

BETAINV: returns the inverse of the cumulative distribution function for a specified beta distribution.

BINOM.DIST: returns the individual term binomial distribution probability.

BINOM.INV: returns the smallest value for which the cumulative binomial distribution is less than or equal to a criterion value.

BINOMDIST: returns the individual term binomial distribution probability.

CHIDIST: returns the one-tailed probability of the chi-squared distribution.

CHIINV: returns the inverse of the one-tailed probability of the chi-squared distribution.

CHISQ.DIST: returns the chi-squared distribution.

CHISQ.DIST.RT: returns the right-tailed probability of the chi-squared distribution.

CHISQ.INV: returns the inverse of the left-tailed probability of the chi-squared distribution.

CHISQ.INV.RT: returns the inverse of the one-tailed probability of the chi-squared distribution.

CHISQ.TEST: returns the test for independence.

CHITEST: returns the test for independence.

CONFIDENCE: returns the confidence interval for a population mean.

CONFIDENCE.NORM: uses a normal distribution to return the confidence interval for a population mean.

CONFIDENCE.T: uses a Student's t distribution to return the confidence interval for a population mean.

CORREL: returns the correlation coefficient between two datasets.

COUNT: counts how many numbers are in the list of arguments.

COUNTA: counts how many values are in the list of arguments.

COUNT BLANK: counts the number of blank cells within a range.

COUNTIF: counts the number of cells that meet the given criteria within a range.

COUNTIFS: counts the number of cells that meet multiple criteria within a range.

COVAR: returns covariance, which is the average of the products of paired deviations.

COVARIANCE.P: returns covariance, which is the average of the products of deviations for each data point pair in two datasets.

COVARIANCE.S: returns the sample covariance, which is the average of the products of deviations for each data point pair in two datasets.

CRIT BINOM: returns the smallest value for which the cumulative binomial distribution is greater than or equal to a criterion value.

DEVSQ: returns the sum of squares of deviations.

EXPON.DIST: returns the exponential distribution.

EXPONDIST: returns the exponential distribution.

F.DIST: returns the F probability distribution.

F.DIST.RT: returns the F probability distribution.

F.INV: returns the inverse of the F probability distribution.

F.INV.RT: returns the inverse of the F probability distribution.

F.TEST: returns the result of an F-test.

FDIST: returns the F probability distribution.

FINV: returns the inverse of the F probability distribution.

FISHER: returns the Fisher transformation.

FISHERINV: returns the inverse of the Fisher transformation.

FORECAST: returns a value along a linear trend.

FREQUENCY: returns a frequency distribution as a vertical array.

FTEST: returns the result of an F-test.

GAMMA.DIST: returns the gamma distribution.

GAMMA.INV: returns the inverse of the gamma cumulative distribution.

GAMMADIST: returns the gamma distribution.

GAMMAINV: returns the inverse of the gamma cumulative distribution.

GAMMALN: returns the natural logarithm of the gamma function, $\Gamma(x)$.

GAMMALN.PRECISE: returns the natural logarithm of the gamma function, $\Gamma(x)$.

GEOMEAN: returns the geometric mean.

GROWTH: returns the y-values for a series of new x-values along an exponential trend.

HARMEAN: returns the harmonic mean.

HYPGEOM.DIST: returns the hypergeometric distribution.

HYPGEOMDIST: returns the hypergeometric distribution.

INTERCEPT: returns the intercept of the linear regression line.

KURT: returns the kurtosis of a dataset.

LARGE: returns the k-th largest value in a dataset.

LINEST: returns the parameters of a linear trend.

LOGEST: returns the parameters of an exponential trend.

LOGINV: returns the inverse of the lognormal cumulative distribution.

LOGNORM.DIST: returns the lognormal distribution of x.

LOGNORM.INV: returns the inverse of the lognormal cumulative distribution function of x.

LOGNORMDIST: returns the cumulative lognormal distribution.

MAX: returns the maximum value in a list of arguments.

MAXA: returns the maximum value in a list of arguments, including numbers, text, and logical values.

MEDIAN: returns the median of the given numbers.

MIN: returns the minimum value in a list of arguments.

MINA: returns the smallest value in a list of arguments, including numbers, text, and logical values.

MODE: returns the most common value in a dataset.

MODE.MULT : returns a vertical array of the most frequently occurring or repetitive values in an array or range of data.

MODE.SNGL: returns the most frequently occurring or repetitive value in an array or range of data.

NEGBINOM.DIST: returns the negative binomial distribution.

NEGBINOMDIST: returns the negative binomial distribution.

NORM.DIST: returns the normal distribution for the specified mean and standard deviation.

NORM.INV: returns the inverse of the normal cumulative distribution for the specified mean and standard deviation.

NORM.S.DIST: returns the standard normal cumulative distribution.

NORM.S.INV: returns the inverse of the standard normal cumulative distribution.

NORMDIST: returns the normal cumulative distribution.

NORMINV: returns the inverse of the normal cumulative distribution.

NORMSDIST: returns the standard normal cumulative distribution.

NORMSINV: returns the inverse of the standard normal cumulative distribution.

PEARSON: returns the Pearson product moment correlation coefficient.

PERCENTILE: returns the k-th percentile of values for a set of data.

PERCENTILE.EXC: returns the k-th percentile of values for a set of data, where k is in the range of 0 to 1, exclusive.

PERCENTILE.INC: returns the k-th percentile of values in a range.

PERCENT RANK: returns the rank of a value in a dataset as a percentage of the dataset.

PERCENT RANK.EXC: returns the rank of a value in a dataset as a percentage (in the range of 0 to 1, exclusive) of the dataset.

PERCENT RANK.INC: returns the rank of a value in a dataset as a percentage (in the range of 0 to 1, inclusive) of the dataset.

PERMUT: returns the number of permutations for a given number of objects.

POISSON: returns the Poisson distribution.

POISSON.DIST: returns the Poisson distribution.

PROB: returns the probability that values in a range are between two limits.

QUARTILE: returns the quartile of a dataset.

QUARTILE.EXC: returns the quartile of a dataset, based on percentile values in the range of 0 to 1, exclusive.

QUARTILE.INC: returns the quartile of a dataset, based on percentile values in the range of 0 to 1, inclusive.

RANK: returns the rank of a number in a list of numbers. The rank of a number is its size relative to other values in a list.

RANK.AVG: returns the rank of a number in a list of numbers. The rank of a number is its size relative to other values in a list.

RANK.EQ: returns the rank of a number in a list of numbers. The rank of a number is its size relative to other values in a list.

RSQ: returns the square of the Pearson product moment correlation coefficient.

SKEW: returns the skewness of a distribution.

SLOPE: returns the slope of the linear regression line.

SMALL: returns the k-th smallest value in a dataset.

STANDARDIZE: returns a normalized value.

STDEV: estimates the standard deviation based on a sample.

STDEV.P: calculates the standard deviation based on the entire population.

STDEV.S: estimates the standard deviation based on a sample.

STDEVA: estimates the standard deviation based on a sample, including numbers, text, and logical values.

STDEVP: calculates the standard deviation based on the entire population.

STDEVPA: calculates the standard deviation based on the entire population, including numbers, text, and logical values.

STEYX: returns the standard error of the predicted y-value for each x in the regression.

T.DIST: returns the Student's t-distribution.

T.DIST. 2T: returns the two-tailed Student's t-distribution.

T.DIST.RT: returns the right-tailed Student's t-distribution.

T.INV: returns the left-tailed inverse of the Student's t-distribution.

T.INV. 2T: returns the two-tailed inverse of the Student's t-distribution.

T.TEST: returns the probability associated with a Student's t-test.

TDIST: returns the Student's t-distribution.

TINV: returns the inverse of the Student's t-distribution.

TREND: returns the y-values of a specified array along a linear trend.

TRIMMEAN: returns the mean of the interior of a dataset.

TTEST: returns the probability associated with a Student's t-test.

VAR: estimates variance based on a sample.

VAR.P: calculates variance based on the entire population.

VAR.S: estimates variance based on a sample.

VARA: estimates variance based on a sample, including numbers, text, and logical values.

VARP: calculates variance based on the entire population.

VARPA: calculates variance based on the entire population, including numbers, text, and logical values.

WEIBULL: returns the Weibull distribution.

WEIBULL.DIST: returns the Weibull distribution.

Z.TEST: returns the one-tailed probability-value of a z-test.

ZTEST: returns the one-tailed probability-value of a z-test.

Text functions

CHAR: returns the character specified by a code number. CLEAN: removes all non-printable characters from text. CODE: returns a numeric code for the first character in a text string. CONCATENATE: joins several text items into one text item. DOLLAR: uses the \$ (dollar) currency format to convert a number to text. EXACT: checks whether two text values are identical. FIND: finds one text value within another (case-sensitive). FIXED: formats a number as text with a fixed number of decimal places. LEFT: returns the leftmost characters from a text value. LEN: returns the number of characters in a text string. LOWER: converts text to lowercase. MID: returns a specific number of characters from a text string starting at the position that you specify. PROPER: capitalizes the first letter in each word of a text value. REPLACE: replaces characters within text. REPT: repeats text a given number of times. RIGHT: returns the right most characters from a text value. SEARCH: finds one text value within another (case-insensitive). SUBSTITUTE: substitutes new text for old text in a text string. T: converts its arguments to text. TEXT: formats a number and converts it to text. TRIM: removes spaces from text. UPPER: converts text to uppercase. VALUE: converts a text argument to a number.

5.BI portals

5.1. BI portal overview

A BI portal, referred to as a data product, is a set of dashboards, workbooks, data reporting modules, downloads, and external links organized in menus with various levels. You can use a BI portal to perform complex topic-based data analysis with navigation menus.

5.2. Create a BI portal

This topic describes how to create a BI portal.

Procedure

- 1. Log on to the Quick BI console, and select a workspace.
- 2. In the left-side navigation pane, select **BI Portals**.
- 3. Click Create BI Portal.

| := | BI Portals All Items My Items | Name V Q. Total Files 1 + Create BI Portal |
|--------------------|-------------------------------|--|
| 🕼 DefaultWorks 🗇 - | Name 💂 | Created By 💠 Modified By/At Actions |
| BI Portals | * 🖵 Untitled • | 5094112100153210 1/10/2019, 23:57:24 ⊠ ℝ ∝¢ ⊨ |
| Dashboards | | |
| Se Workbooks | | |
| Datasets | | |
| ♦ Data Sources | | |

4. On the BI portal edit page, set the parameters, and then click Save.

5.3. Configure a BI portal

This topic describes how to set the title, upload the logo, and edit the footer for a BI portal on the portal settings page.

Prerequisites

A BI portal is created. For more information, see Create a BI portal.

Procedure

- 1. Log on to the Quick BI console and select a workspace.
- 2. In the left-side navigation pane, click **BI Portals**.
- 3. On the BI Portals page, click the name of a BI portal.
- 4. Click the 👩 icon in the top navigation bar and configure the BI portal.

Dat a analysis BI port als

| Site Config | | | | × |
|-------------|---------------------------|-----------------|---------|--------|
| Normal C | onfig | | | |
| Title | Quick BI | Portals | | |
| Layout | | | | |
| | | | | |
| Left An | id Top | Left | То | p |
| Theme | | | | |
| | • | • | | |
| dark | light cus | tom | | |
| LOGO | | | Preview | Upload |
| | Size recom within 100k | mended: 60 ‹ | *60~180 | *60, |
| Alias | https://bi-a | p-southeast | | |
| | 1.data.aliyu | un.com/prod | luct/ | |
| | | .htm | 🗗 Cop | y Link |
| Advanced | l configurati | on | | |
| Show | Subtitle | | | |
| | | | | |
| 🛃 Show | Footer | | | |
| Pow | vered by Qu | iick BI | | |
| Show | Menu Crun | nbs 🛈 | | |
| Cache | e Menu 🛈 | | | |

| Configuration category | Parameter | Description |
|------------------------|-----------|---|
| | Title | Customize the title of the BI portal. |
| | Layout | Select Left And Top, Left, or Top. |
| | Theme | Select Dark, Light, or Custom. |
| | LOGO | Click Upload to upload a logo image file. |
| | | · |
| | | |
| Normal Config | | |

| Configuration category | Parameter | Description |
|------------------------|------------------|---|
| | Alias | Enter a value in the text box under Alias. The value is embedded in the portal link. For example, if you enter 1, the alias is http://daily.yunbi.biz.aliyun.tes t/product/1.htm. |
| | | Alias https://bi-ap-southeast- 1.data.aliyun.com/product/ 1 .htm O Copy Link |
| | Show Subtitle | After you select this option, add a subtitle for the portal. |
| | Show Footer | After you select this option, customize the footer, which is displayed at the bottom of the content page. |
| Advanced configuration | Show Menu Crumbs | After you select this option, the menu levels are displayed at the top of the content page. |
| | Cache Menu | After you select this option and open multiple menus at the same time, reloading is not required when you switch between menus. |

5. Click the Save icon.

5.4. Configure menus

You can add or delete menus, modify menu levels, and specify the menu names.

Prerequisites

A BI portal is created. For more information, see Create a BI portal.

Procedure

- 1. Log on to the Quick BI console and select a workspace.
- 2. In the left-side navigation pane, click **BI Port als**.
- 3. On the BI Portals page, click a BI portal name.
- 4. In the left-side navigation pane, click a menu name. Configure parameters on the **Menu Config** and **Content settings** tabs in the right-side part of the page.



| Tab | Parameter | Description |
|-------------|-------------------|--|
| | Add main menu | Add a level-1 menu. Image: Note You can also drag and drop a menu to adjust its level. |
| Menu Config | | Hides a menu. If a parent menu is hidden, its child menus are also hidden. If you want to show a menu after it is hidden, click the icon again. |
| | ÷ | Adds a level-2 or lower menu. |
| | A | Set a menu as the home page. When you open a BI portal, this home page appears. |
| | | Deletes a menu. |
| | Menu display name | Specifies the name of a menu. |

| Parameter | Description |
|-------------------|---|
| Show menu icon | Sets the icon of a menu. |
| Menu can fold | Specifies whether a menu can be folded. |
| | Specifies the default state of a menu. |
| Default folding | Note This option can be selected only if Menu can fold is selected. |
| Set to empty node | If this option is selected, you cannot set the menu content. |
| Content settings | The following content types are supported: • Dashboard • Excel • Data reporting • Downloads • External link View mode: The options are Open in current page and Open in a new window. • Note This field cannot be configured if Set to empty node is selected. |
| | Show menu icon Menu can fold Default folding Set to empty node |

5. Click **Save** in the upper-right corner of the page.

5.5. Share, rename, and transfer a BI portal and change its security level

You can share your BI portals with other users. You can also edit the properties of a BI portal. Specifically, you can rename the BI portal, transfer it to another user, or change its security level.

Prerequisites

A BI portal is created. For more information, see Create a BI portal.

Share a BI portal

- 1. Log on to the Quick BI console and select a workspace.
- 2. In the left-side navigation pane, click **BI Port als**.
- 3. On the BI Portals page, find the BI portal that you want to share with other users, and click **Share** in the Actions column.
- 4. In the Share side pane that appears, set the expiration date and select the users with whom you want to share the BI portal.

| Share | | | | | |
|---------------------|--------------|------------|------------------|------------|---------------|
| Name : | Untitled | | | | |
| * Expiration Date : | Duration | ~ | | | |
| * Scope : | All Users | 0 | User Groups | 🕕 User | 'S |
| Note: | Three author | ization le | evels coexist, a | and a user | only requires |
| | one permissi | on. | | | |

5. Click Save.

- ... -

Rename a BI portal, transfer it to another user, or change its security level

- 1. Log on to the Quick BI console and select a workspace.
- 2. In the left-side navigation pane, click **BI Portals**.
- 3. On the BI Portals page, find the target BI portal, and click Edit Properties in the Actions column.
- 4. In the Edit Properties side pane that appears, rename the BI portal, transfer it to another user in the workspace, or change its security level. If the security level is set to Protected (Allow Other Workspace Members to Edit), the lock mechanism is triggered when multiple users attempt to edit the BI portal at the same time.

| Edit Propert | les |
|-----------------|---|
| * Name: | Untitled |
| Owner: | 5641121015320 ···································· |
| Description: | Enter a description. |
| Security Level: | Private (Allow Only Workspace Owner to Edit) Protected (Allow Other Workspace Members to Edit) |

5.6. BI portal menu permissions

Workspace administrators can manage permissions to view BI portal menus.

- 1. Log on to the Quick BI console.
- 2. Select the target workspace. For information about how to create a workspace, see Create a workspace.
- 3. In the left-side navigation pane, click **BI Portals**.
- 4. On the BI Portals page that appears, select the target portal and click **More** in the Actions column, or right-click the target portal and select **Manage Menu Permissions**, as shown in the following figure.

| Name \$ | | |
|----------------|---------------------------|--|
| * 📃 352 👁 | | |
| * 🖵 Untitled © | 🛛 Edit | |
| | 🗐 Edit Properties | |
| | ୍ଦି Share | |
| | Delete | |
| | о́Мападе Menu Permissions | |

5. In the **Manage Menu Permissions** dialog box that appears, select the target menu, specify whether the menu is available only to authorized users, and select the users or user groups that you want to authorize. The configuration takes effect immediately.

| Profit Menu authority management | | \times |
|--|--|----------|
| Menu selection | Permission settings | |
| Search by keyword Q | Only authorized to be visible : O Yes No | |
| ✓ Menu permissions | User group User | |
| ∨ Level 1 Menu | ▶□ 所有成長 | |
| ✓ Level 2 Menu | 0123_pte0[046] | |
| profits | □ 約約4 | |
| | 一 进行改变 | |
| | ind. | |
| | 01002_play_05/440 | |
| | 第回4号本編 | |
| | | |
| | | |
| ① Click to select the to-authorize menu. | | |
| | Cancel | ОК |
| | | |

- ⑦ Note The meanings of values of Available Only to Authorized Users are as follows:
 - Yes: Only authorized users and user groups can access this menu.
 - $\circ~$ No: All users and user groups can access this menu.

For information about how to create a user group, see Create a user group.

6. Click Close to complete configuring the menu permissions.