# Alibaba Cloud

Quick BI Best Practices

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C-J Alibaba Cloud

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### **Document conventions**

Style	Description	Example
<u>↑</u> 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.
? Note	A note indicates supplemental instructions, best practices, tips, and other content.	Note: 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 <b>OK</b> .
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.Create a report where different data is available to different people

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

Row-level permissions of Quick BI make different data of a report be available to different people. This section describes the feature by taking the company\_sales\_record dataset as an example. For more information about how to create a dataset, see Create a dataset.

**?** Note Currently, row-level permissions are only available in Quick BI Pro and Quick BI Enterprise Standard. If you want to activate Quick BI Pro or Quick BI Enterprise Standard, see Quick BI purchase, upgrade, and renew.

#### Configure row-level permissions

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

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

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

Home >	MyDatasets	
Name	*	
Ũ	company_sales_record_en_u company_sales_record_en_u	🗹 Edit
Ũ	company_sales_record_en_u company_sales_record_en_u	<ul> <li>II Create Dashboard</li> <li>Screate Workbook</li> <li>Edit Properties</li> </ul>
Ũ	company_sales_record_en2 company_sales_record_en2	Row-Level Permissions
	company_sales_record_en1	🗇 Delete

- 5. Select the Enable Row-Level Access Control check box, and select User / User Group Authorization.
- 6. Click the drop-down arrow and select a field such as area, as shown in the following figure.

	Row-Level	Access to Dat	aset company_sales_record_en	X
	<mark> Enable Rov</mark>	w-Level Access	Control Field <mark>area</mark>	\$
	Group	User	Permissions	
	Search by ke	eyword Q		
	marketing			
	finance			
	sales			
	学校中			
	the l			
	2.810			
	aliyun			
(	Only the firs	st 500 members	s are listed. However, you can search	for and
а	dd more men	nbers.		Close

7. Select a member in the list.

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

Row-Level Access to Dat	aset company_sales_record_en 🗙
Carable Row-Level Access	Control Field area
Group User	Permissions
Search by keyword Q	✓  ☐ Configured Permissions
marketing	🗸 🗁 area
finance	➤ Inherited Permissions (non-editabl
sales	🗸 🗁 area
7%A	
<b>85</b>	
194	
aliyat	
U Only the first 500 members	are listed. However, you can search for and
add more members.	Close

- 8. Click area to expand all information contained in the field.
- 9. Select an area such as the selected region, and then click Add.

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

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

10. Click **Close** to complete the configuration.

#### Verify row-level permissions

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

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

5. Click Save to share the report.

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

## 2.Use filters in a workbook

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

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

#### Prepare a workbook

You can create the following workbook based on the company\_sales\_record dataset and name it **Shipping costs**. For more information basic workbook operations, see <u>Overview</u> and <u>Create a workbook</u>.

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Paste	🛉 🕐 쿠 B	I U S A	<u> è</u> =	= =	1 🗄	abc %	s% 🔛 🗡	<u></u> ∰ ≜	1 🖷 A 🔾	∑ Style		🗌 Theme Config (	b 🔍 🔻 🖠	Filter Bar
H1	8 Update <sub>fx</sub>												Ready	Highlight Pivot Tables
	A	В	С	D	E	F	G	н	1	J	К > 🗖	Pow	ti	filter data en us 🗸 🕅
1	Area	Shipping_cost										1.0W	••	
2	Central China	872775										str.Area	⇔x	Q Enter keyword search 🖒
3	East China	1954194										Į		
4	North China	2148882												Dimensions
5	Northeast	1576604										Column		str. Area
6	Northwest	910672										in final t		
7	South China	3235348										M2 ElliShipping_cos	st ⇒×	Measures 📖
8	Southwest	334821										L		- 🗁 Default
9												Filters		Nº Shipping cost
10												,		empping_coot
11												Drag and drop fields		
12														
13												Aggregator	Itome	
14												Ayyreyates	Items	
15														

#### Filter

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

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

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

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

Paste	Calibri	12p IUSA	×	= =		Genera abc %		▲ 毘 岐 (田 ½	∎ <b>∄</b> n ≣ 6 Q	21 📰 🖩	в Г Т	<mark>Jıll</mark> heme Config	-⊻ dı ⊛ @	•
A	L Update <del>f</del> x Al	rea								Filter Ready	٠	Highlight Piv	ot Table	s
	А	В	С	D	E	F	G	н > 🗖	Pow	Clear t	filte	er data en us	~	
1	Area	Shipping_cost							ROW	A clear		_uuuu_cn_uu		
2	Central China	872775							Double-clie	ck or drag-and-dro				்
3	East China	1954194							L					
4	North China	2148882									Dir	mensions		
5	Northeast	1576604							Column			Str. Area		
6	Northwest	910672							Double-clip					
7	South China	3235348							L		i Me	asures 📖		
8	Southwest	334821										🗁 Default		
9									Filters			Nº Shipping	cost	
10									Drag and c					
11										nob lielos to filis a.				

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



The filter results are shown in the following figure.

	A 🏹	В
3	East China	1954194
4	North China	2148882
7	South China	3235348

#### Filter bar

You can use Filter Barto filter target data.

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

Paste	□ X ⊂ • <b>↑                                   </b>	Ilibri 12p BIUSA	×		→= =+ =↓ ◆ 69	General abc %	10 123	≡ /≅ 	ii 罠 眼 王 ₩	[Ⅲ ½Ⅲ ●Ⅲ ●Ⅲ	<b>∄ ⊪</b> 6 Q	2↓ ↓ Style		P I Ther	l <b>ılıl</b> me Config	<u>≁</u> dı ⊛ @	© Ø ▼ \$	Filter Bar	
A	1 Update <sub>fx</sub>	Area																Read	Y
+4	Add Relative Cu	be														> 🗖	Row	1	1
-	А	▼ B	с	D	E	F		G	Н		1	J	К	L	М	N			
1	Area	Shipping_cost				-		-						-			~ 1		
2	Central China	872775															Column		
3	East China	1954194																ck or drag-and-dro	
4	North China	2148882																	
5	Northeast	1576604																	
6	Northwest	910672															Filters		
7	South China	3235348																	
8	Southwest	334821																	
9																			
10																	Aggrega	tes Items	
11																			
12																			

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

Area	a:		l Relative	Cube										> 🗖	Query Source Field	filter_data_en_us 🛛 🗸 🗹
			i reduire	cube											Area	
	A	▼ B	С	D	E	F	G	Н	1	J	K	L	M	N	Str. Area 🕫 🖓 前	<u>.</u>
1	Area	Shipping_cost														Dimensions
2	Central China	872775													Double dick or drag and drag	Str. Area
3	East China	1954194													Double-click of drag-and-drop	
4	North China	2148882														Measures ===
5	Northeast	1576604														- 🗁 Default
6	Northwest	910672														Nº Shipping_cost
7	South China	3235348														
8	Southwest	334821														

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

Filter Item Settings	Data 📦 filter_data_en_us		×					
View source field	Label: Area							
🐭 Area	The same data set Different data sets	Set Filter Criteria						
	Select All	Filter By Condition	Filter By Enumeration					
	Charts-Sheet1!Pivot Table1	Radio 💿 Multiple Select						
		East China,South China,Nort	th China <del></del>					
		Please Enter a Name to S	3 Added 🛛 🕮 Manual Input					
		Central China	~					
		🛃 East China	East China 🔟					
		🗹 North China	South China 👖					
		Northeast	North China 🔟					
		Northwest						
		🗹 South China						
		Southwest						
		Select All	Added3Article 💼					
		Sort by fixed value	ок					

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

ea: ast China,South Cl	Area: hina,• East C	hina,North	China,*	+Add Relative	Cube															[	Search
A	• B	С	D	E	F	G	н	1	J	К	L	M	N	0	р	Q	R	S	т		
Area	Shipping_cost																				
East China	1954194																				
South China	3235348																				
North China	2148882																				

#### Filters

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

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



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

Set Filter				$\times$
🗊 filter_data_en_us	Str. Are	ea		
Filter By Condition	Filte	er By Enum	eration	
Radio 💿 Multiple Select				
East China,North China,Sout	h China <del>√</del>			
Please Enter a Name to S	3 Added	🗐 Manua	l Input	
Central China			~	
🗹 East China	East Chin	ia	Ū	
🗸 North China	North Ch	ina	Ū	
Northeast	South Ch	ina	Ū	
Northwest			¢	
🔽 South China 🛛 🕀			ve	est 9
Southwest			Cł	nir 32 est 3
Select All	Added3Ar	ticle	Ū	
Sort by fixed value		ОК		

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

Area	:		下 前 Area	:		+Add	Relative Ci	Row 1	filter_data_en_us 🗸 🗹
Eas	t China,Sou	uth Chir	ia,▼ Eas	t China,Nor	th China,▼			Str. Area 😂 🗙	
	A	•	В	С	D		E		
1	Area		Shipping_cos	st					measures
2	East China		19541	94				Column	🝷 🗁 Default
3	North Chin	na	21488	32				Nº En Shinning cost ≙X	Nº Shipping_cost
4	South Chin	na	32353	48					
5									
6								Filters	
7									
8								Str.Area 🍸 🗙	
9									
10								Anaronatos Items	
11									
12									
13									
14									
15								Preview Lines 1000	
16									
-	- F	Sheet	1 🕀			:	4	Update	

# 3.How do I use a query control to query data based on a date field?

You can use a query control to query data based on a date field. The following example uses the company\_sales\_record dataset to describe how to use a query control to query data based on a date field.

#### Create a dataset

- 1. Log on to the Quick BI console.
- 2. Click the **Workspace** tab. On the Workspace page that appears, click **Data Sources** in the left-side navigation pane.
- 3. On the Data Sources page that appears, click **Create Data Source** in the upper-right corner. In the Add Data Source dialog box that appears, select a data source.
- 4. Click the **Create Dataset** icon in the Actions column that corresponds to the data source. For more information, see **Create a dataset**.

#### Create a dashboard

- 1. On the Datasets page, find the target dataset, and click the **Create Dashboard** icon in the Actions column. In the dialog box that appears, specify the dashboard type and click OK.
- 2. On the dashboard edit page that appears, click the Edit Dataset icon and select the **company\_sales\_record** dataset.
- 3. Create the following chart and save the dashboard.



#### Query data of a date range

- 1. Click the **Query control** icon.
- 2. Click the New filter icon in the query control.
- 3. In the **Query condition setting** dialog box that appears, specify the query condition name, associated charts and fields, and the query condition. For more information, see **Query data based** on a date field.
- 4. Click **OK** to complete the configurations.

5. 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.



## 4.Use filters in a dashboard

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

Scenario: Compare shipping costs for East China, South China, and North China based on the company\_sales\_record dataset.

#### Create a dataset

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

#### Create a dashboard

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



5. Click Update. A chart is generated automatically.

#### Filter data

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

Data	Sty	le Advanced
Arc Angle (Measures	)	company_sales_reco $\vee$
Nº <b>m</b> shipping_cost	: <b>\\$X</b>	Q Enter keyword search 🖒
Slice Label (Dimensi Str.area	ons) ⊜×	Dimensions
Filters		<sup>Str.</sup> order_level <sup>Str.</sup> shipping_type
Str.area	₽×	Str. area
		Measures 📖
		💛 🗁 Default
		Nº order_number
		№ order_amt
Preview Lines 1000	D	№ back_point
Update		Nº profit_amt Nº price

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

Set Filter		$\times$	Labels (Dimensi	ons)
<pre>fcompany_sales_reco</pre>	⊚ area		💿 area	
Filter by Condition	Filter by Value		Filters	
Single Select     Multiple Select	ect		💿 area	
	•			
	Cancel	ок		

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

Set Filter	×
<pre>fcompany_sales_reco</pre>	💿 area
Filter by Condition Single Select Multiple	Filter by Value
Search by name.	Specify
Center East North	
Northeast	Add required items from K
South	the left-side list.
Select All	
Add by Select Sequence	ОК

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



# 5.Associate multiple datasets with a dashboard

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

#### Create a dataset

- 1. Log on to the Quick BI console.
- 2. Choose **Workspace > Datasets** to enter the Datasets page.
- 3. Click Create Data Sources to select a data source.
- 4. Click the Create Dataset icon to Create a dataset.

#### Create a dashboard

- 1. Click Dashboards to enter the Dashboards page.
- 2. On the Data tab, select the company\_sales\_record\_en\_us dataset.
- 3. Select a chart such as table.
- 4. Select the required fields.
- 5. Click **Update** to update the chart.
- 6. Click the Style tab, rename the chart to Overseas report.
- 7. On the Data tab, select the company\_sales\_record dataset.
- 8. Select a chart and fields, such as table.
- 9. Click **Update** to update the chart.
- 10. Click the Style tab, rename the chart Domestic report.
- 11. Click **Save** to save the dashboard.

#### Associate multiple datasets with a dashboard

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

report chart.

# 6.How do I use a query control to query data based on a numeric field?

You can use a query control to query data based on a numeric field.

Scenario: Query provinces and cities with whose profits are within the range from USD 2,500 to USD 4,500. In this example, the company\_sales\_record dataset is used.

#### Create a dataset

- 1. Log on to the Quick BI console.
- 2. Click the **Workspace** tab. On the Workspace page that appears, click **Data Sources** in the left-side navigation pane.
- 3. On the Data Sources page that appears, click **Create Data Source** in the upper-right corner. In the Add Data Source dialog box that appears, select a data source.
- 4. Click the **Create Dataset** icon in the Actions column that corresponds to the data source. For more information, see **Create a dataset**.

#### Create a dashboard

- 1. On the Datasets page, find the target dataset, and click the **Create Dashboard** icon in the Actions column. In the dialog box that appears, specify the dashboard type and click OK.
- 2. On the dashboard edit page that appears, click the Edit Dataset icon and select the company\_sales\_record dataset.
- 3. Create the following cross table.

<b>T</b> 1 1		0544				
oss lable-company_s	ales_record_er	n_0514			:	Data Source Type:
report_date(year)	province	city	product_sub_type	shipping_cost	order_amt	
09	Jiangsu	82	G2r	40	2408	Rows
09	Jiangsu	100	第四, 四子, 何	3	93	
09	Jiangsu	10.0	たび開発品	20	1124	report_date(year)
09	Jiangsu	10.0	810128	10	1036	province
09	Jiangsu	524	2752880+	14	158	© city
09	Jiangsu	25/1	0.81854	4	1284	Str. product_sub_type
09	Jianosu	500	10%	10	346 ~	+1
						Columns
						<pre>shipping_cost(SUM)</pre>
						Nº order_amt(SUM)

#### Query numeric data

- 1. Click the Query control icon.
- 2. Click the **New filter** icon in the query control.
- 3. In the **Query condition setting** dialog box that appears, specify the query condition name, associated charts and fields, and the query condition. For more information, see **Query data based** on a numeric field.
- 4. Click **OK** to complete the configurations.

5. In the query control, specify the value range that you want to query and click **Inquire**. The chart to which the query control applies is updated.

	O TI	ps: No query currently	Query condition setting					View Operation Gu	de> ×
			Query conditions	+ ;	Related charts and	Field smart 👔	Query condition co	onfiguration	Make require
ross Table-company_sales_reco	ord_en_0514		II Profit_amt	© : 1	Odgelect all Q, 2 charts	Clear selected field	Basic configuratio	n	$\vee$
report_date(year) provi	nce city 憲宣	product_sub_type 信时			□ 📈 Line Chart company_s		Display typ Nun	nerical input box	
009 Jiangsu	南京	前刀,尺子,锯			Cross Table company s	Nº profit amt	Aggregation		
109 Jiangsu	南京	办公装饰品 安田电路					method Sum	mation	
009 Jiangsu	· 用示 盐城	夹子及其配件					Conditional form		
09 Jiangsu	苏州	电脑配件					<ul> <li>Single condition</li> </ul>	on 🔿 Or condition 💿 And cond	ion
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