ALIBABA CLOUD

Alibaba Cloud

Quick BI

Best Practices

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Alibaba Cloud

Legal disclaimer

Document conventions

Style	Description	Example
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.
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.
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 **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 list --instanceid` *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.

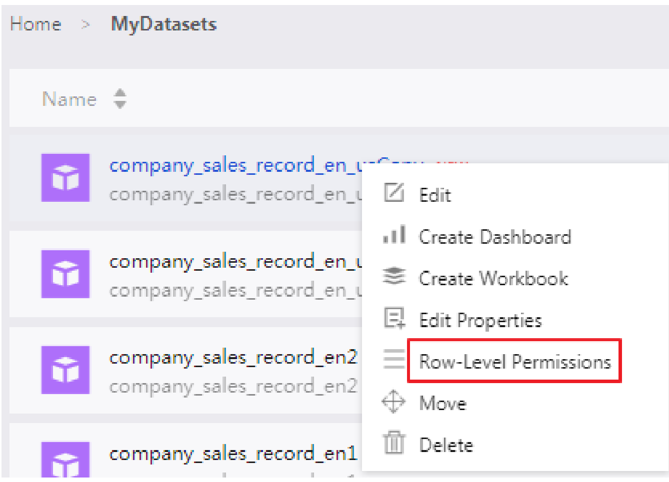
Note Currently, row-level permissions are only available in Quick BI Pro and Quick BI Enterprise Standard. If you want to activate Quick BI Pro or Quick BI Enterprise Standard, see Quick BI purchase, upgrade, and renew.

Configure row-level permissions

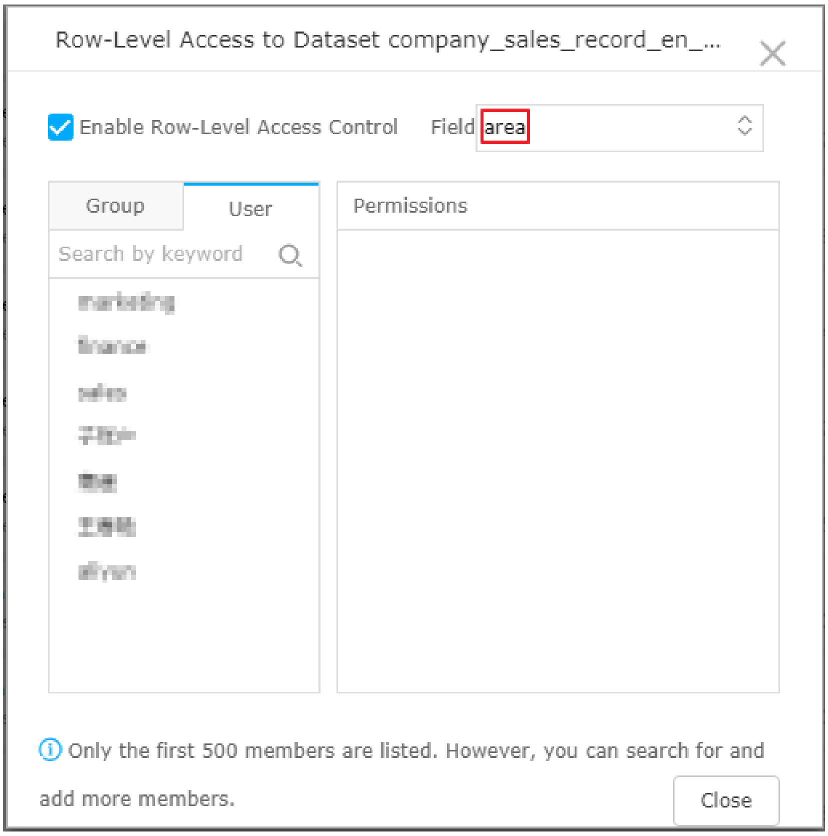
You can configure the row-level permissions of a dataset in the workspace.

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.

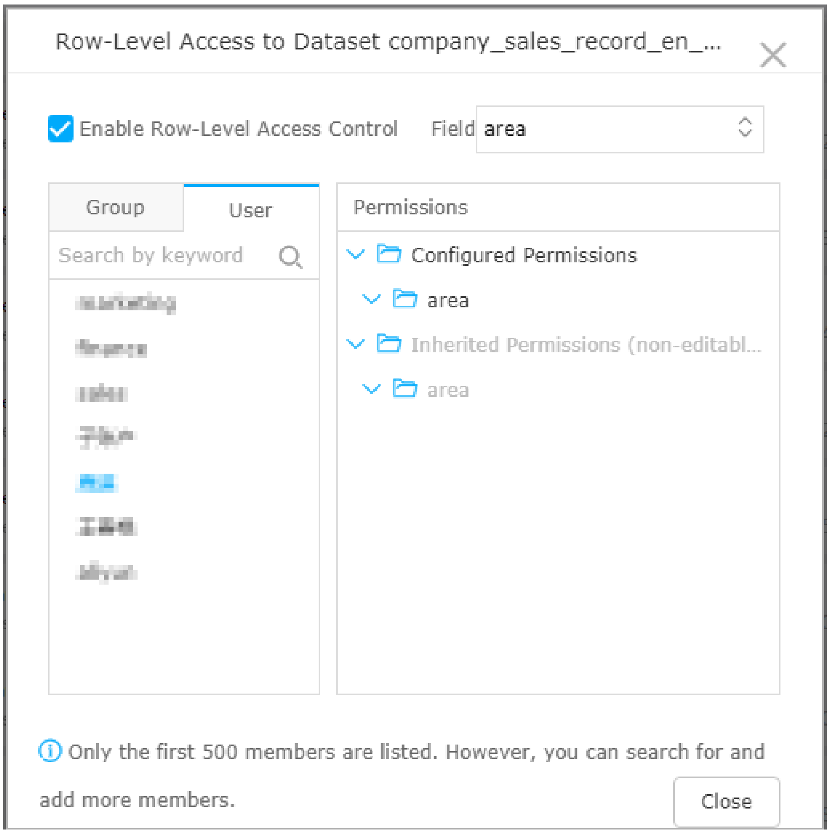


5. Select the **Enable Row-Level Access Control** check box, and select **User / User Group Authorization**.
6. Click the drop-down arrow and select a field such as area, as shown in the following figure.



7. Select a member in the list.

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



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

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

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

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

Verify row-level permissions

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

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

5. Click **Save** to share the report.

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

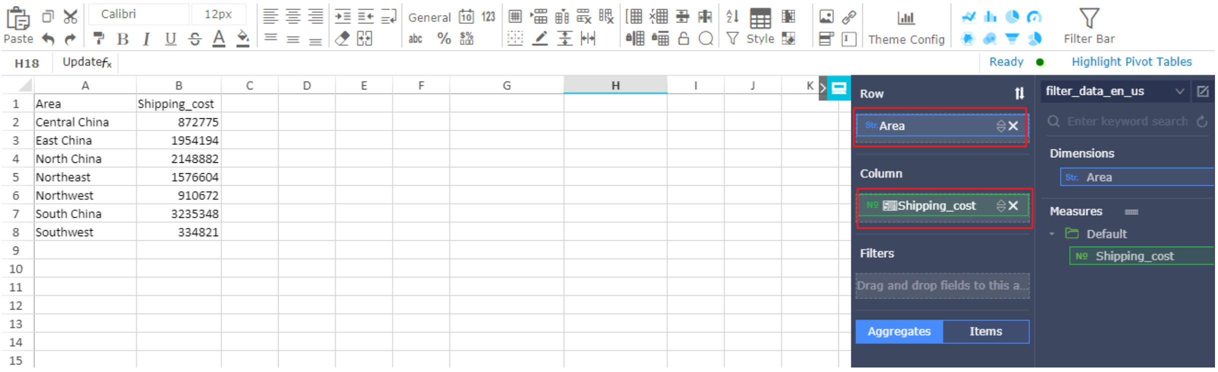
2.Use filters in a workbook

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 Overview and Create a workbook.



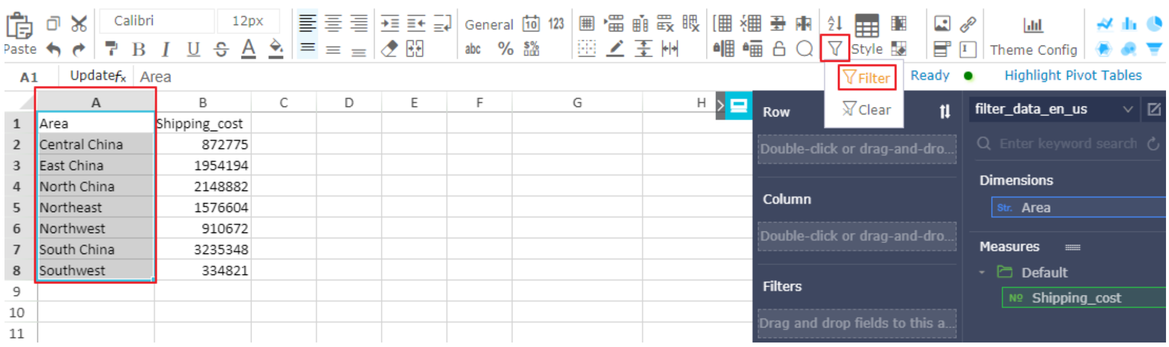
Filter

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

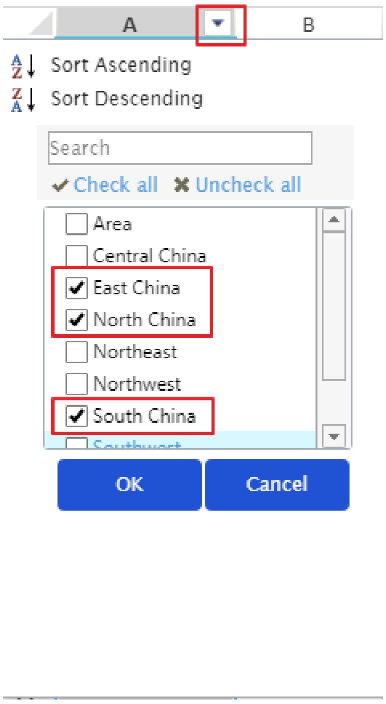
1. In the **Shipping costs** workbook, select the **area** column or all of the data contained in the column.

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

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

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



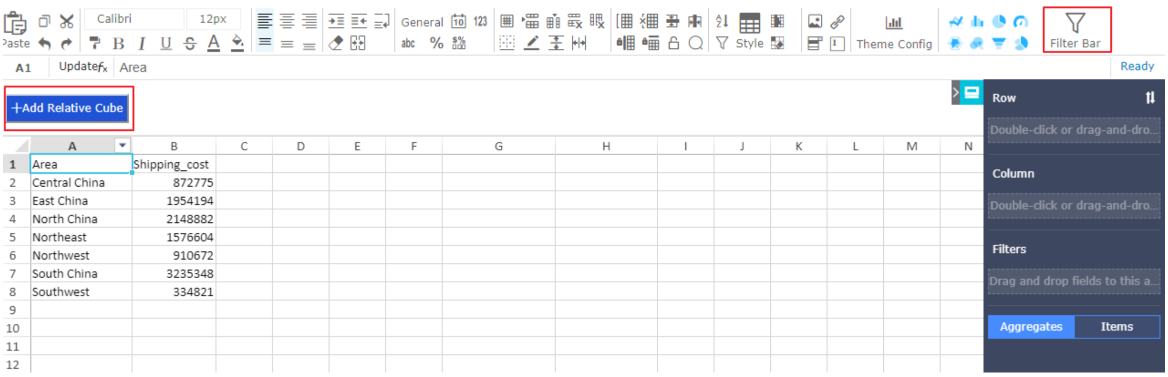
The filter results are shown in the following figure.

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

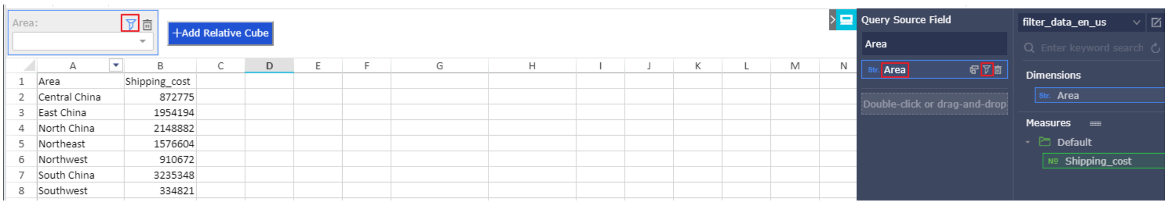
Filter bar

You can use Filter Bar to filter target data.

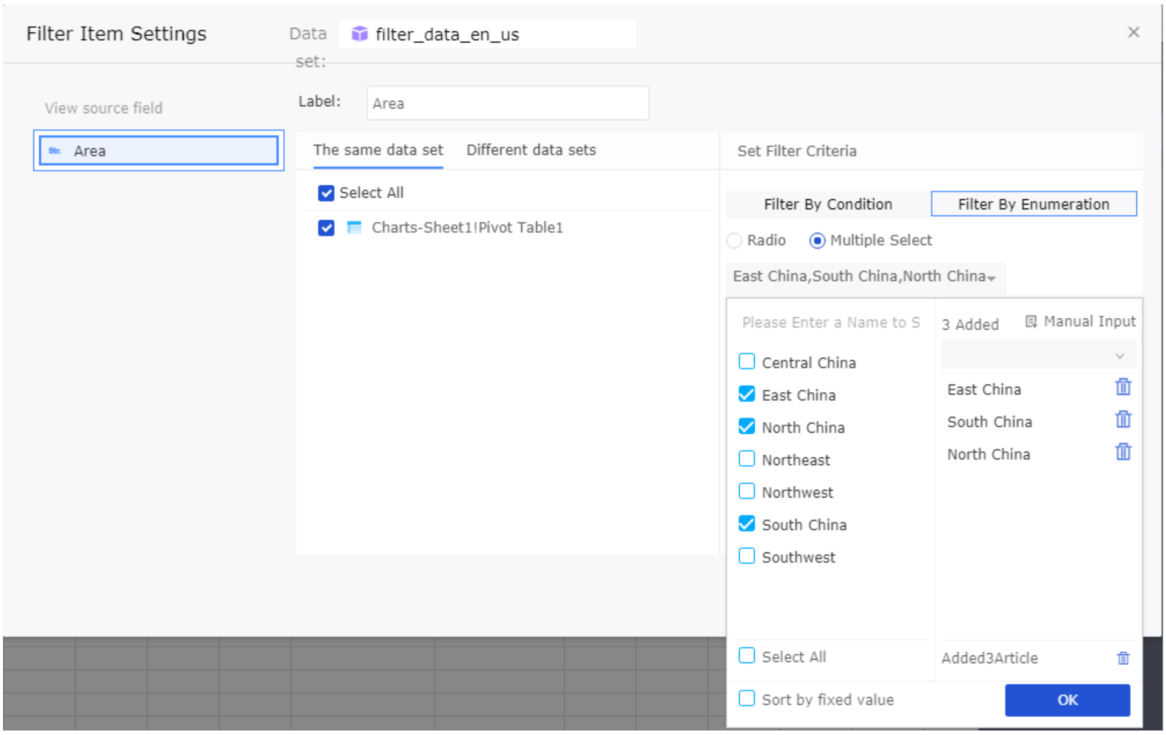
1. In the **Shopping costs** workbook, click **Filter Bar** and **+Add Correlated Datasets** as shown in the following figure.



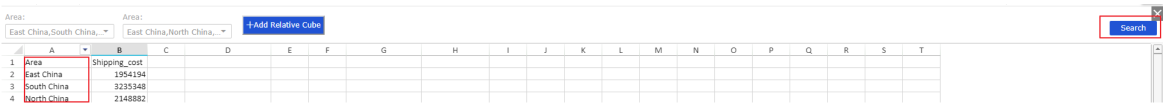
2. Double click the **area** field or drag this field to the **Filter Fields** area and click the **Set Filter** icon as shown in the following figure.



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



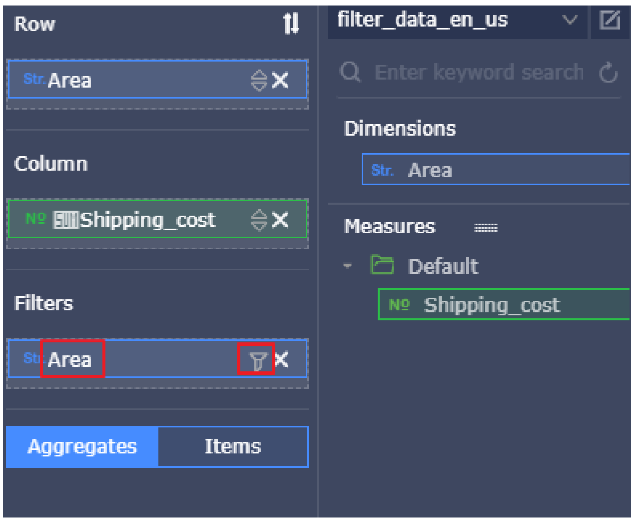
4. Click **Search** to obtain the results as shown in the following figure.



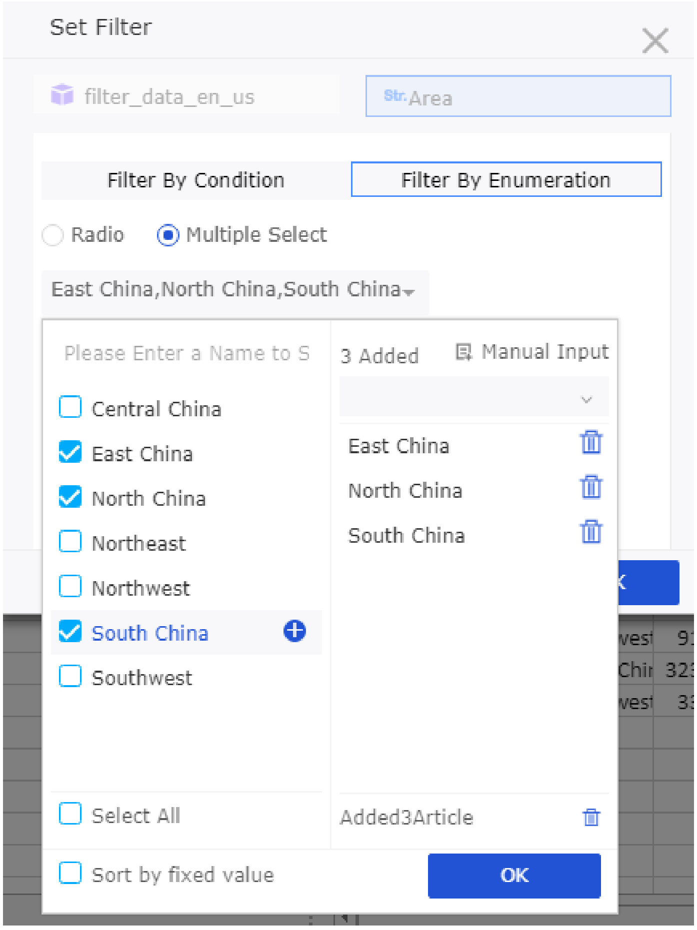
Filters

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

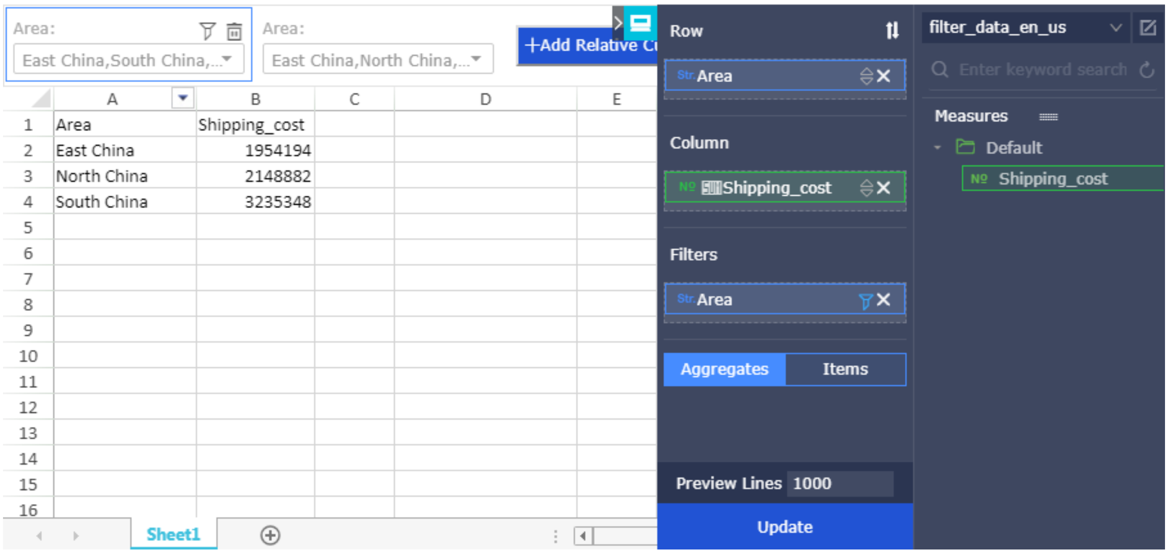
1. When you create a workbook, drag the **area** field to the **Filters** area and click the Set Filter icon as shown in the following figure.



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



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



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

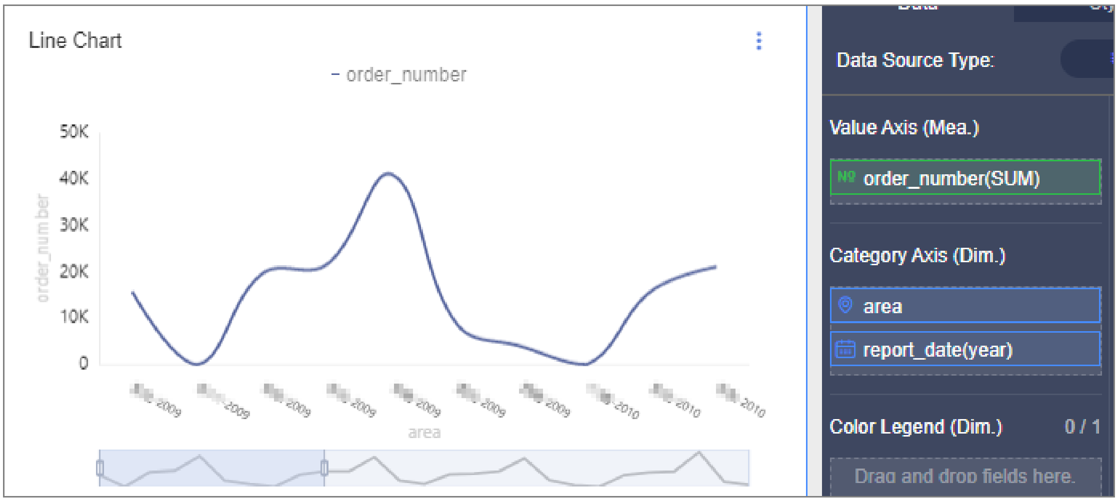
You can use a query control to query data based on a date field. The following example uses the company_sales_record dataset to describe how to use a query control to query data based on a date field.

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

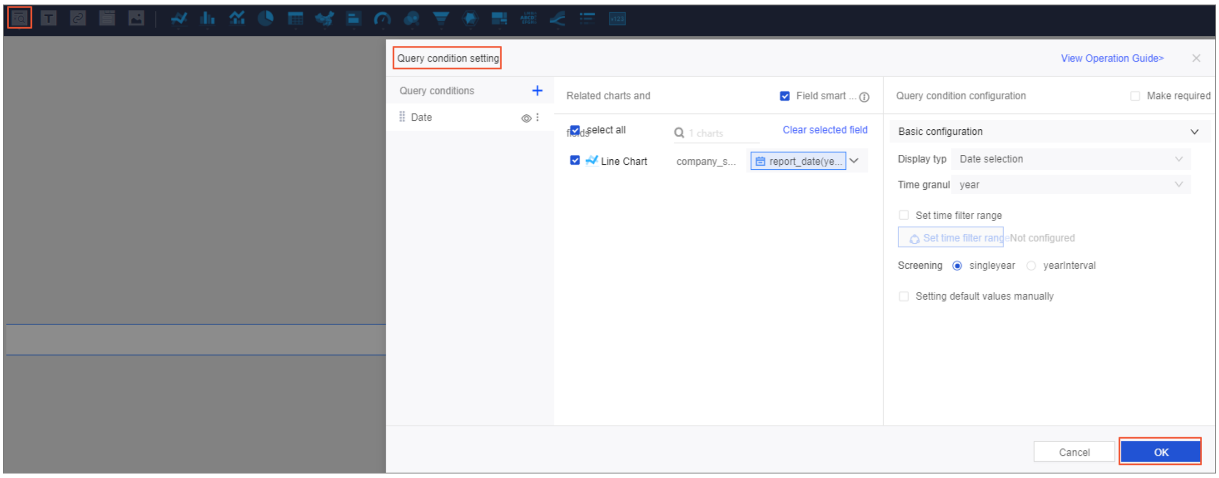
1. On the Datasets page, find the target dataset, and click the **Create Dashboard** icon in the Actions column. In the dialog box that appears, specify the dashboard type and click OK.
2. On the dashboard edit page that appears, click the Edit Dataset icon and select the **company_sales_record** dataset.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

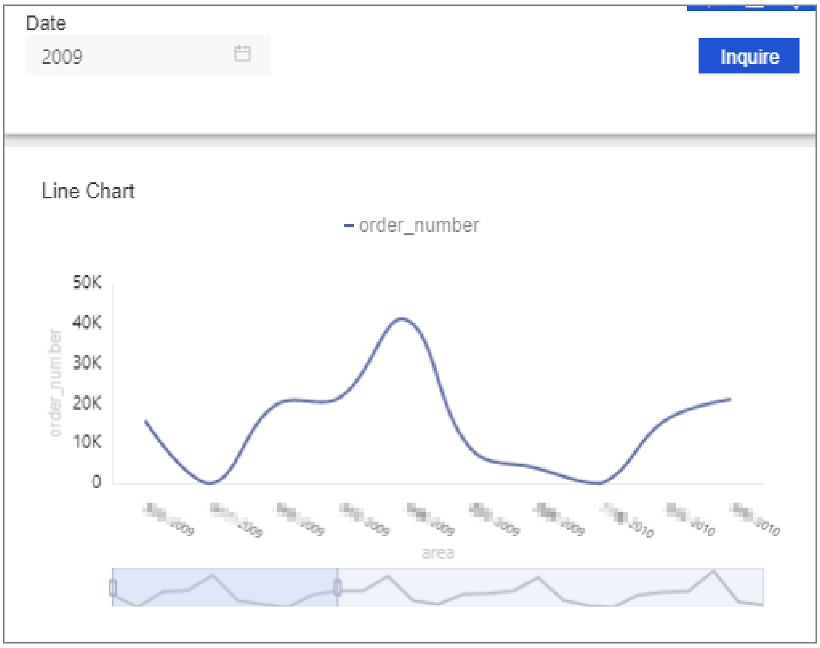


Query data of a date range

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.

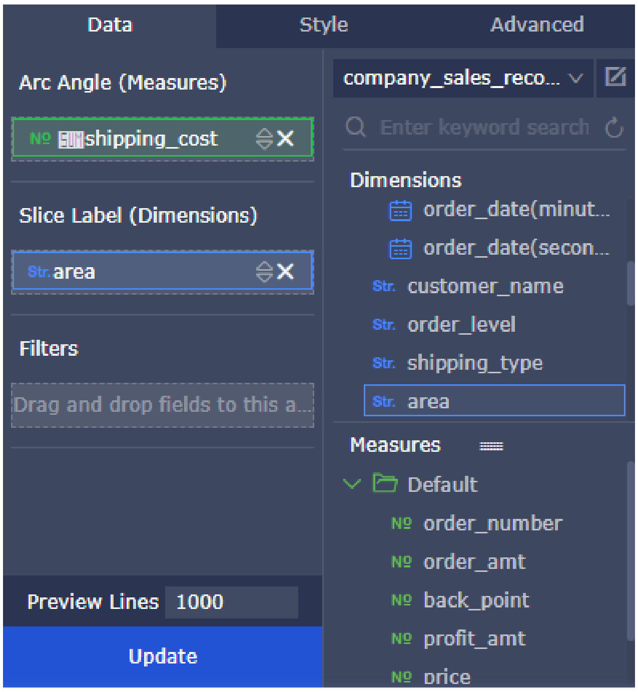
Scenario: Compare shipping costs for East China, South China, and North China based on the company_sales_record dataset.

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

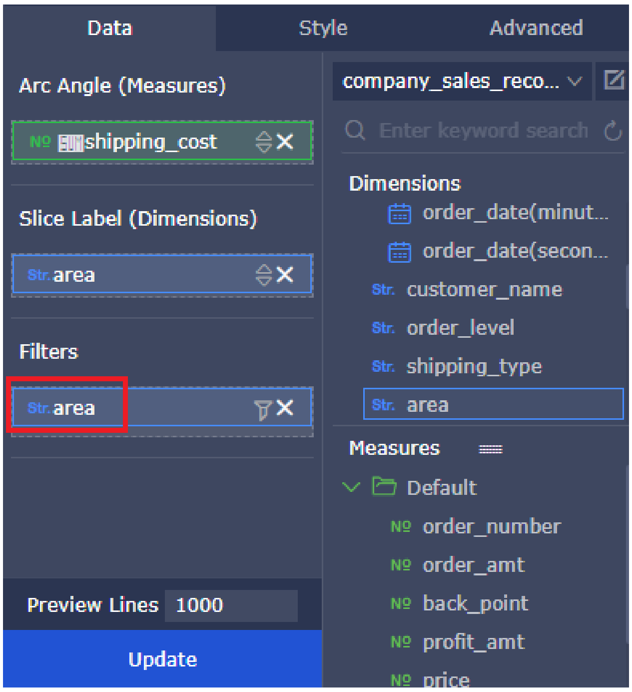
1. Click **Dashboards** to enter the Dashboards page.
2. Click the Switch dataset icon, and select the **company_sales_record** dataset.
3. Select a chart such as a pie chart.
4. Select a field as shown in the following figure.



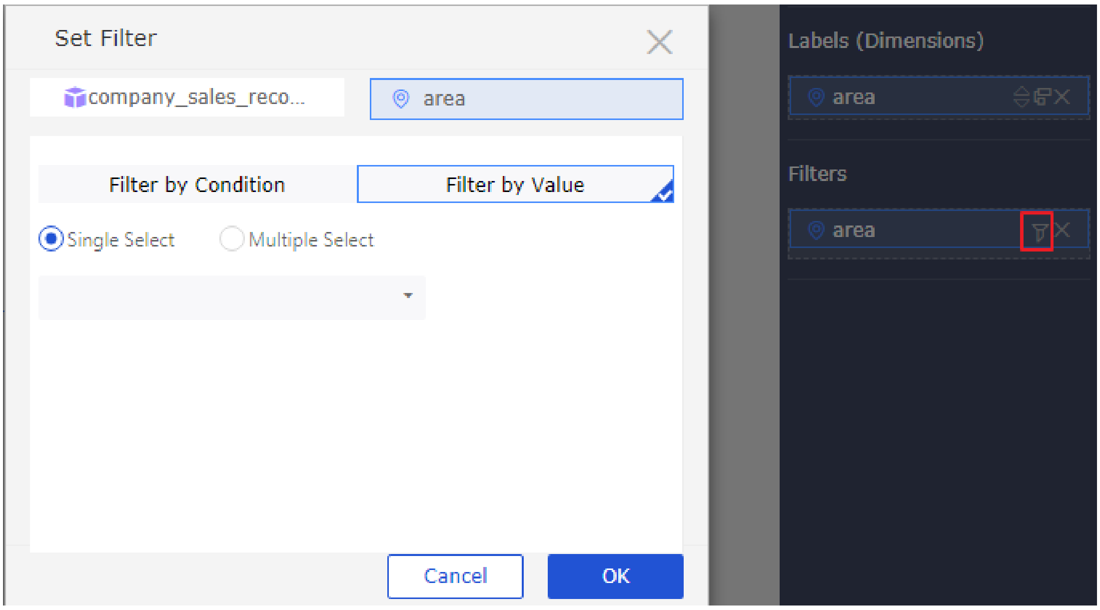
5. Click **Update**. A chart is generated automatically.

Filter data

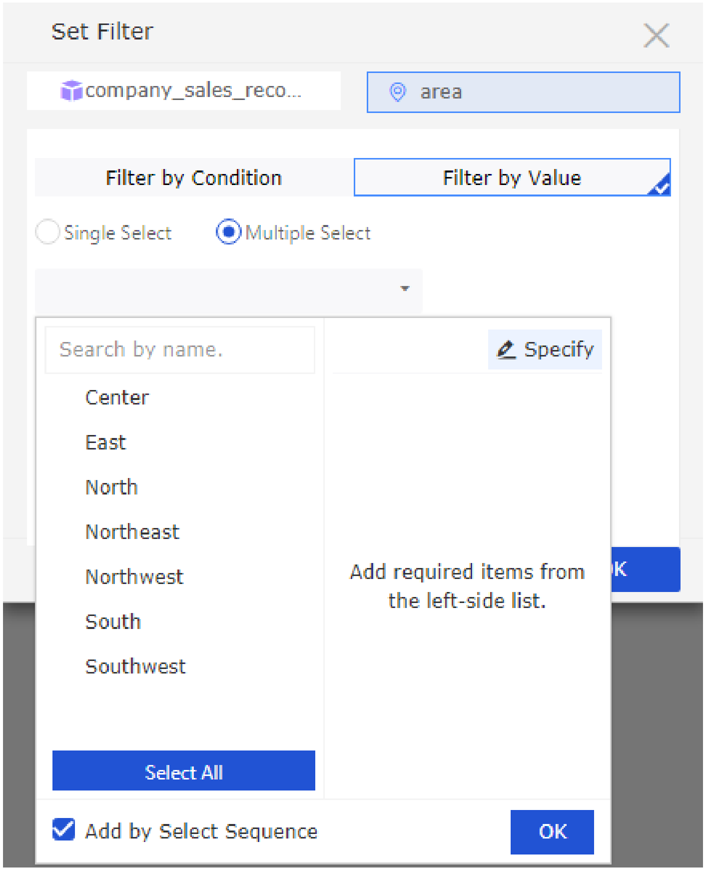
1. Drag the **area** field to the **Filters** area as shown in the following figure.



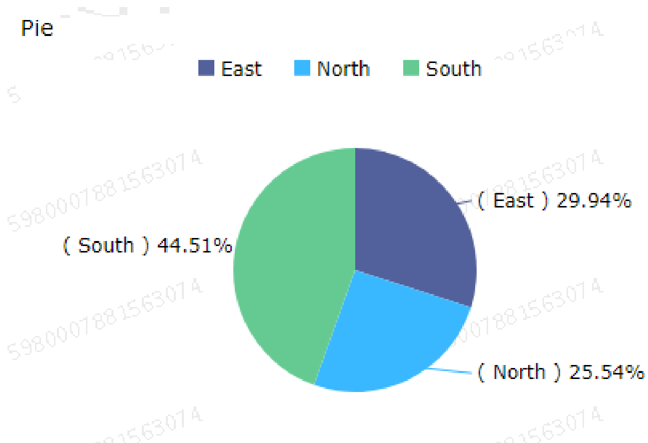
2. Click **Filters** icon to set filter conditions as shown in the following figure.



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



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

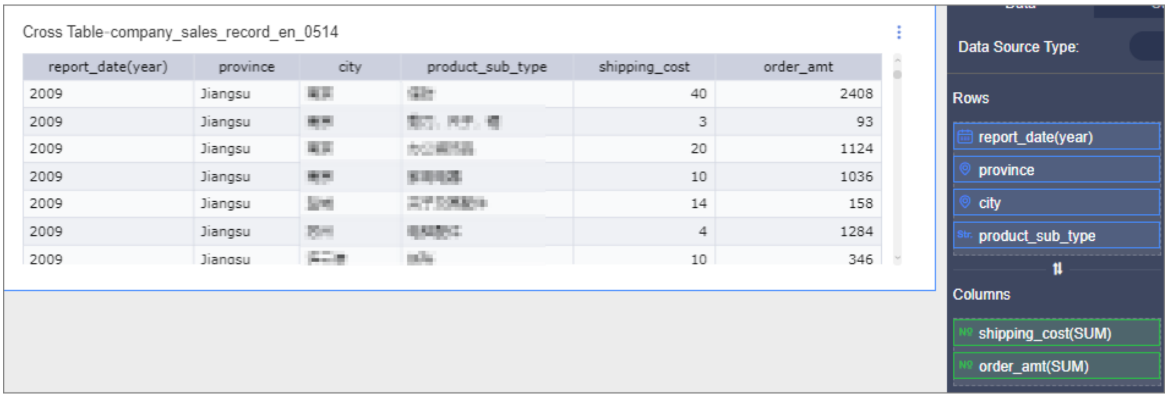
Scenario: Query provinces and cities with whose profits are within the range from USD 2,500 to USD 4,500. In this example, the company_sales_record dataset is used.

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.



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.