

Tips and Tricks

A step by step guide to boost your BI skills

TIP #1 Filter by Value

TIP #2 Adding Cascading Filters to a Discover

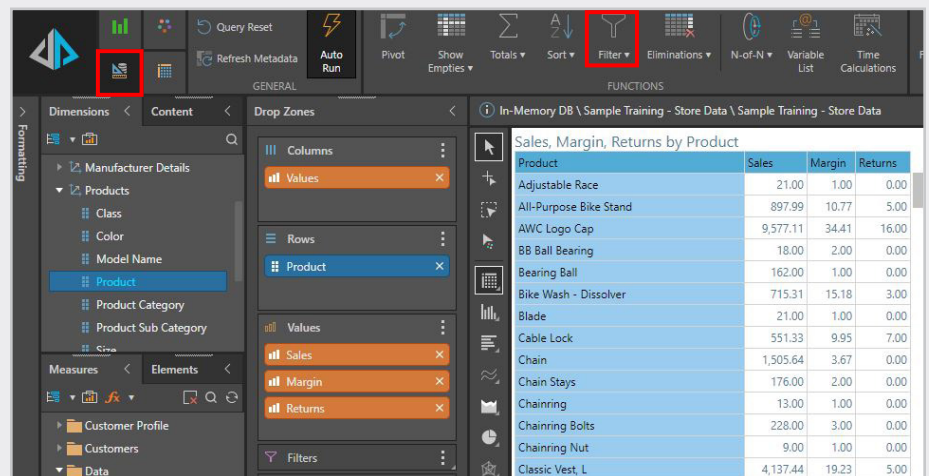
TIP #3 Creating Aggregate Measure with a Right Mouse Click

TIP #1

Filter by Value

This will allow end users to filter the results of a report by a specific value based on a data item.

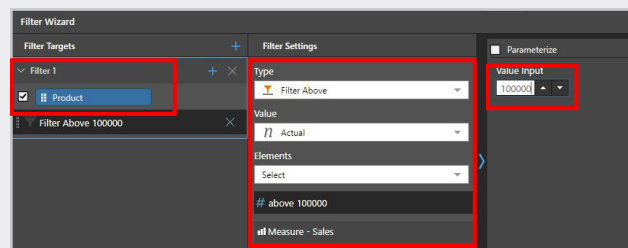
- 1 Open a report in Discover. To filter, go to the Query ribbon > Filter > Filter to open the filter wizard



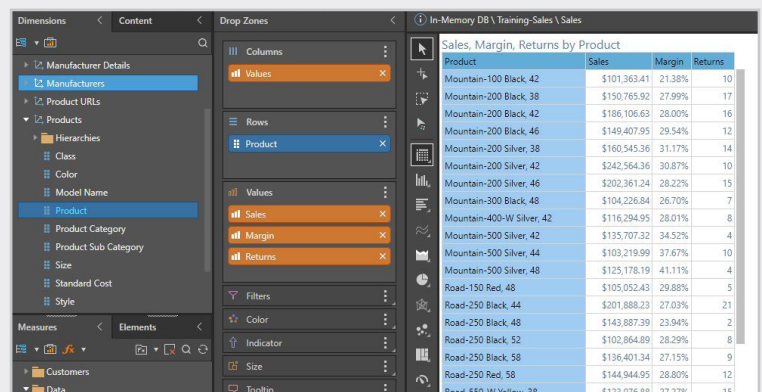
The screenshot shows the QlikView interface with the 'Filter' ribbon selected. The 'Filter' button is highlighted with a red box. Below the ribbon, the 'Drop Zones' pane shows 'Product' in the Rows zone and 'Sales', 'Margin', and 'Returns' in the Values zone. The main view displays a pivot table titled 'Sales, Margin, Returns by Product'.

Product	Sales	Margin	Returns
Adjustable Race	21.00	1.00	0.00
All-Purpose Bike Stand	897.99	10.77	5.00
AWC Logo Cap	9,577.11	34.41	16.00
BB Ball Bearing	18.00	2.00	0.00
Bearing Ball	162.00	1.00	0.00
Bike Wash - Dissolver	715.31	15.18	3.00
Blade	21.00	1.00	0.00
Cable Lock	551.33	9.95	7.00
Chain	1,505.64	3.67	0.00
Chain Stays	176.00	2.00	0.00
Chainring	13.00	1.00	0.00
Chainring Bolts	228.00	3.00	0.00
Chainring Nut	9.00	1.00	0.00
Classic Vest, L	4,137.44	19.23	5.00

- 2 Set the parameters in the filter wizard: filter by a specific item, filter type, enter value input, and the measure to base it on and click apply. For this example, it will filter the result set with products that only have over \$100,000 in sales.



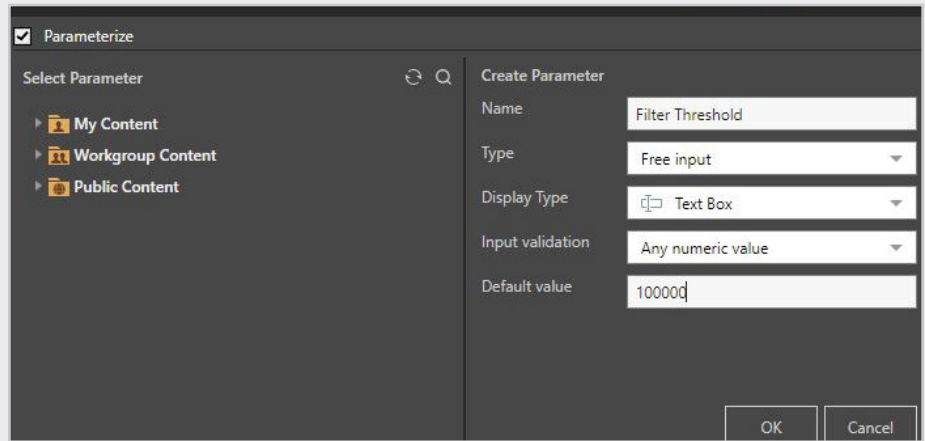
The screenshot shows the 'Filter Wizard' dialog box. The 'Filter Targets' section has 'Product' selected. The 'Filter Settings' section has 'Type' set to 'Filter Above', 'Value' set to 'Actual', and 'Elements' set to 'Select'. The 'Parameterize' section has 'Value Input' set to '100000'.



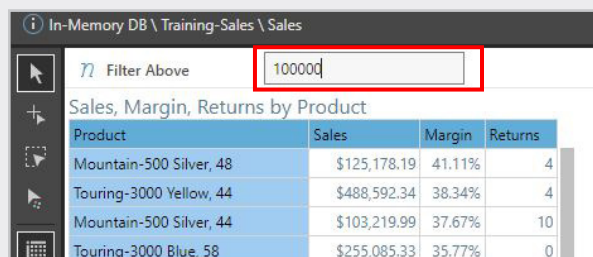
The screenshot shows the QlikView interface with the 'Filter' wizard applied. The pivot table is filtered to show only products with sales over \$100,000.

Product	Sales	Margin	Returns
Mountain-100 Black, 42	\$101,363.41	21.38%	10
Mountain-200 Black, 38	\$150,765.92	27.99%	17
Mountain-200 Black, 42	\$186,106.63	28.00%	16
Mountain-200 Black, 46	\$149,407.95	29.54%	12
Mountain-200 Silver, 38	\$160,545.36	31.17%	14
Mountain-200 Silver, 42	\$242,564.36	30.87%	10
Mountain-200 Silver, 46	\$202,361.24	28.22%	15
Mountain-300 Black, 48	\$104,226.84	26.70%	7
Mountain-400-W Silver, 42	\$116,294.95	28.01%	8
Mountain-500 Silver, 42	\$135,707.32	34.52%	4
Mountain-500 Silver, 44	\$103,219.99	37.67%	10
Mountain-500 Silver, 48	\$125,178.19	41.11%	4
Road-150 Red, 48	\$105,052.43	29.88%	5
Road-250 Black, 44	\$201,888.23	27.03%	21
Road-250 Black, 48	\$143,887.39	23.94%	2
Road-250 Black, 52	\$102,864.89	28.29%	8
Road-250 Black, 58	\$136,401.34	27.15%	9
Road-250 Red, 58	\$144,944.95	28.80%	12
Road-550-W Yellow, 38	\$123,076.88	27.27%	15

- 3 Additionally, you can use a parameter which will allow end users of the report to set the threshold they want to use at run time. To do this, go back to the filter wizard and select “parameterize” > “create a parameter” > and define the parameter > “apply”



- 4 In the report, the end user will be able to type in the value they want to filter the results by.

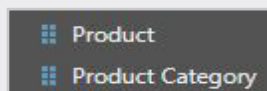


TIP #2

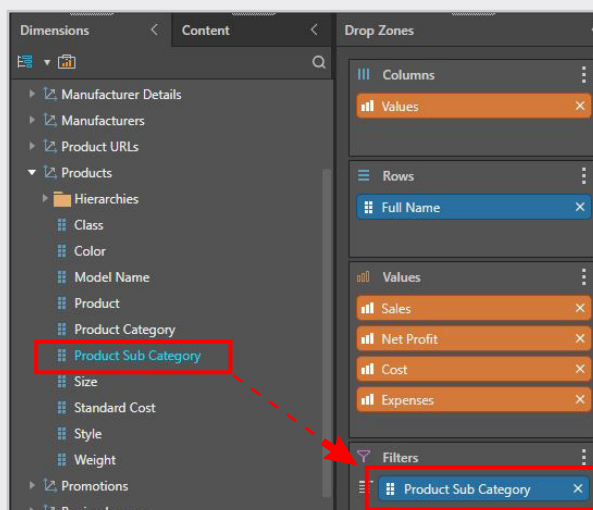
Adding Cascading Filters to a Discover

In the following scenario we are going to add a cascading filter to a Discover. Product Category and Product Sub Category dimensions will be used.

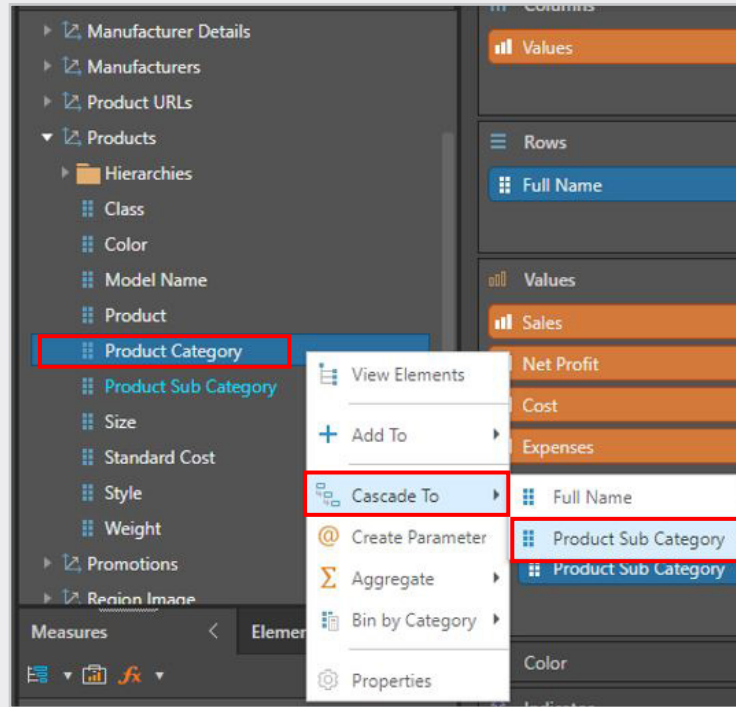
- 1 Locate two dimensions:



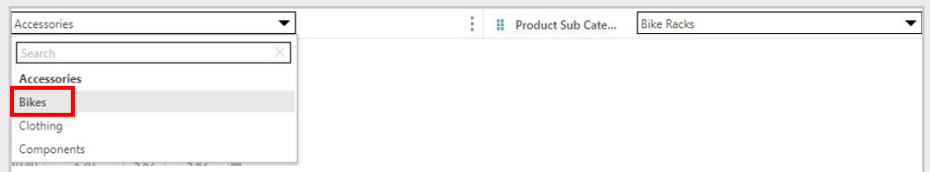
- 2 Drag the second dimension of interest **Product Sub Category** (based on Hierarchy) in the Filter dropdown area.



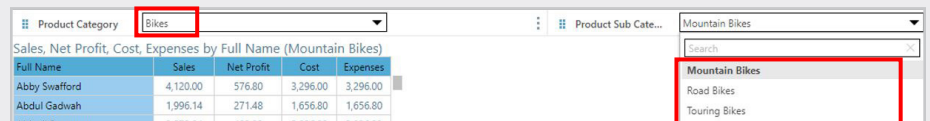
- 3 Right Click on the first Dimension of interest (**Product Category**) in the dimension panel > Cascade to > and select “**Product Sub Category**” (second dimension of interest).



- 4 Two slicers now available in the top section of the discover object (Product Category and Product Sub Category).



- 5 Once we select a value in the first Slicer (example: **Bikes**), only values related to bikes will show up on the second slicer. This limits the number of values that show up on the second slicer dropdown menu, and makes it easier to drill down to the desired information.

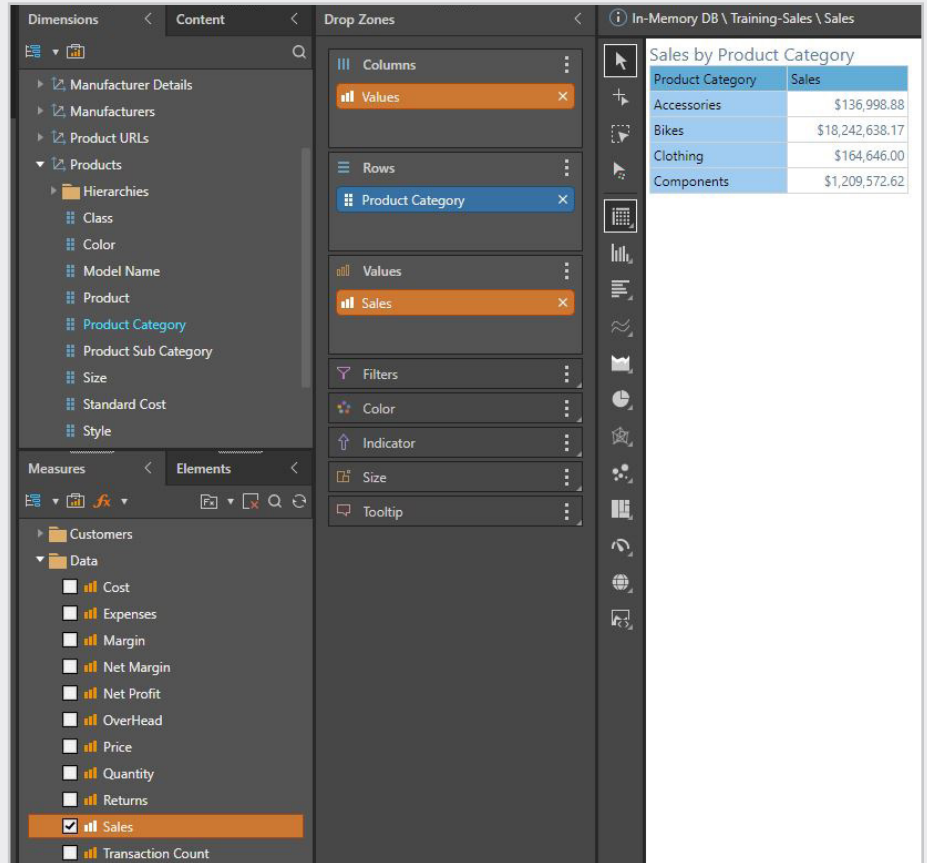


TIP #3

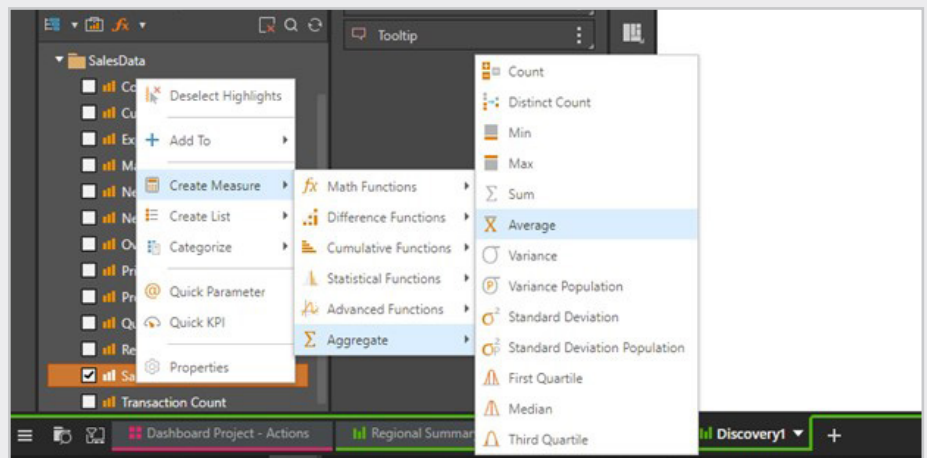
Creating Aggregate Measure with a Right Mouse Click

This is useful if you want to create aggregate measures within Discover, that is currently not included in the Model. In this example, average sales will be derived from sales measure in the model.

- 1 Connect to the sample bikes data source in Discover
- 2 Double click on Sales in the Measure Panel to add to grid
- 3 Double Click on Product Category in Dimension panel to add to grid



- 4 Right click on Sales and select Create Measure > Aggregate > Average



- 5 Notice that Average Sales shows up in your Measures panel and you can now add it to your report

The screenshot displays a BI tool interface with the following components:

- Dimensions Panel:** Shows a tree view of dimensions including Calendar, Channels, CustomerProfiles, Customers, Manufacturers, Products, Hierarchies (Class, Color, Model Name, Product, Product Category, Product Sub Category, Size), and Measures.
- Measures Panel:** Shows a list of measures under 'SalesData', including Cost, Customer Count, Expenses, Margin, Net Margin, Net Profit, and Average Sales (checked).
- Drop Zones Panel:** Shows the report structure with 'Product Category' in the Rows zone, and 'Sales' and 'Average Sales' in the Values zone.
- Report View:** Displays a table titled 'Sales, Average Sales by Product Category' with the following data:

Product Category	Sales	Average Sales
Accessories	744,253.31	100.30
Bikes	17,936,410.59	4,808.69
Clothing	1,359,751.44	183.45
Components	3,227,827.11	501.37