
Before you begin: Log in to your Education sandbox

You have a shared sandbox environment to learn about, use, and experiment with MicroStrategy Web.

- 1 In your browser, navigate to **education.microstrategy.com/MicroStrategy/servlet/mstrWeb**.
- 2 Log in to the sandbox with your **MicroStrategy Account** credentials.
- 3 The MicroStrategy Landing page opens. Click the **MicroStrategy Tutorial** project.
- 4 Click **Go to MicroStrategy Web**.

The Shared Reports folder of the MicroStrategy Tutorial project opens.

In the sandbox environment, you cannot save items in the Shared Reports folder.

Exercise: Create a conditional metric to use the report filter and the metric filter

By default, a conditional metric ignores any related attributes in the report filter. The Northwest Revenue metric that you created in *Exercise: Create a Northwest Revenue conditional metric*, always calculates the Northwest revenue values for the attributes on its report (such as the different categories).

However, you want to see the metric values for the specific call centers selected in a report filter. Adjust the conditional metric so that it uses both its metric filter and the report filter. In this exercise, you create a Northwest conditional metric that uses both the report filter and the metric filter in its calculations. You then compare the different ways that a conditional metric interacts with a report filter.

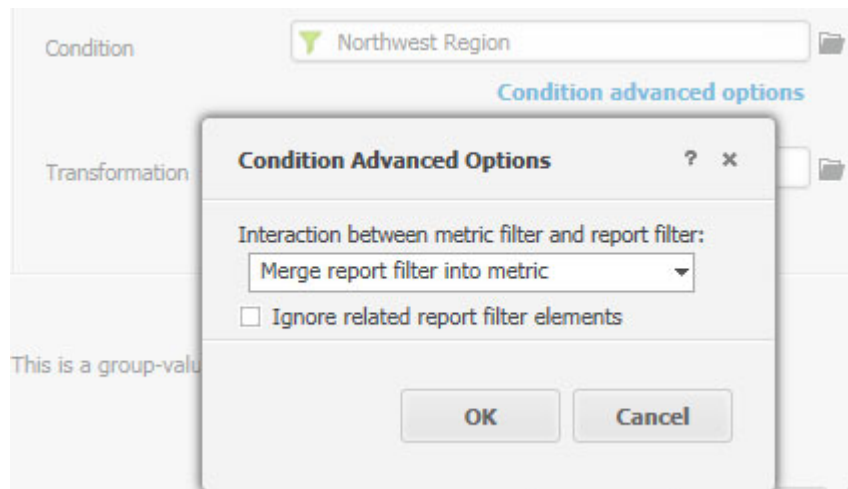
Prerequisites

This exercise builds on the Northwest Revenue conditional metric and the report created in *Exercise: Create a Northwest Revenue conditional metric*. Complete that exercise before starting this exercise.

Create a conditional metric to use the report filter and the metric filter

- 1 Access your Education sandbox. For a reminder on how to do this, see *Exercise: Access your Education sandbox*.
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- 2 On the My Reports folder page, copy the **Northwest Revenue** metric, naming it **Northwest Revenue Filtered**. Add the following **Description**:
Filtered by both the report filter and the metric filter
 - 3 Click the **Northwest Revenue Filtered** metric to edit it.
 - 4 Click **Condition Advanced Options**.
 - 5 In the Condition Advanced Options window, clear the **Ignore Related Report Filter Elements** check box.



- 6 Click **OK**.
- 7 **Save** the metric.

Filter the report and add the new metric

- 1 Open the **Northwest Revenue** report.
Add the filtered conditional metric
 - 2 Add the **Northwest Revenue Filtered** metric, saved in the My Personal Objects\My Reports folder.
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Unfiltered conditional metric report

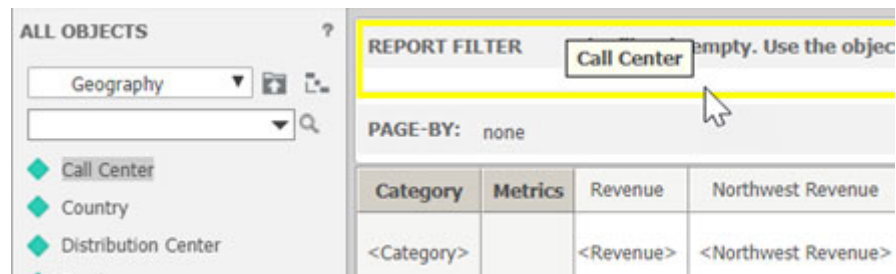
REPORT DETAILS			
Report Filter: Empty Filter			
Category	Revenue	Northwest Revenue	Northwest Revenue Filtered
Books	\$2,640,094	\$129,175	\$129,175
Electronics	\$24,391,303	\$1,234,850	\$1,234,850
Movies	\$4,098,943	\$200,894	\$200,894
Music	\$3,893,367	\$196,269	\$196,269

Q: The two Northwest Revenue metrics calculate the same values. Why?

A: The difference between the two metrics is how each interact with the report filter. Since the report is not yet filtered, the metrics calculate the same results.

Create the report filter

- 3 Click the **Design** icon  to edit the report.
- 4 In the All Objects pane, click **Attributes** and then the **Geography** folder.
- 5 Drag **Call Center** from the All Objects pane to the Report Filter pane.



Call Center is related to Region, the attribute used in the conditional metrics, because both attributes belong to the Geography hierarchy.

- 6 Click **Select**.
- 7 In the list of **Available** objects, double-click **San Francisco**, **San Diego**, and **Salt Lake City** to add them to the Selected list.
- 8 Click **Apply**.

Run the report

- 9 Click the **Run Report** icon .
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The report resembles the following:

Filtered conditional metric report

REPORT DETAILS			
Report Filter: {Call Center} = San Francisco, San Diego, Salt Lake City			
Category	Revenue	Northwest Revenue	Northwest Revenue Filtered
Books	\$355,532	\$129,175	\$74,735
Electronics	\$3,277,329	\$1,234,850	\$715,269
Movies	\$552,413	\$200,894	\$116,542
Music	\$530,305	\$196,269	\$114,901

Because the two metrics deal with the report filter differently, their values calculate differently now that the report contains a filter.

- The Northwest Revenue metric uses the default setting to ignore related attributes in the report filter. The conditional metric always calculates according to the metric's filter, regardless of the report filter. In this case, the metric calculation includes San Francisco and Seattle, even though Seattle is not included on the report. The resulting values are the same as before the report filter was added. To verify this, refer to the *Unfiltered conditional metric report*.
- When related attributes in the report filter are not ignored, as in the Northwest Revenue Filtered metric, both the report filter and the metric filter are used to calculate the metric's values. In this case, the metric calculation includes only San Francisco.

Save the report

10 From the **Report Home** menu, select **Save As**.

11 From the **Save In** drop-down list, select **My Reports**.

12 Name the report **Filtered Northwest Revenue**, and click **OK**.

13 Click **Run Newly Saved Report**.

If you select Return to Original Report instead, you return to the Northwest Revenue report, with your changes. You do not want to save your changes to that report name.

14 **Close** the report.
