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: Compare the revenue from individual sales promotions to non-promotional revenue

Continuing with the scenario from the previous exercise, *Exercise: Compare promotional and non-promotional revenue using conditional derived metrics,* you want to compare the revenue for each sales promotion separately to the non-promotional revenue. You can then identify which promotions are the most successful.

You could create separate derived metrics for each sale, but you also want to continue to view all promotional revenue (both sales promotions). Create a filter so that you can select the seasonal sale or special sale.

This exercise builds on the Regional Revenue Analysis dossier, with its conditional derived metrics, created in *Exercise: Compare promotional and non-promotional revenue using conditional derived metrics*. Complete that exercise before starting this exercise.

Filter the dossier by promotion type

1 Access your Education sandbox. For a reminder on how to do this, see *Exercise: Access your Education sandbox*.

2 Open the **Regional Revenue Analysis** dossier, saved in the My Reports folder.

3 Display the revenue values so that it is easier to see any changes. On the Format panel, click **Visualization Options** ￼. Enable **Data Labels**.

Now you can clearly see, in the bar graph, that the promotional revenue for Central is $1,011,561, while non-promotional revenue is $4,017,805.
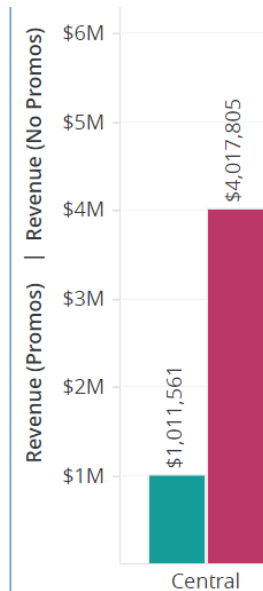
4   Drag the **Promotion Type** from the Datasets panel to the Filter panel.
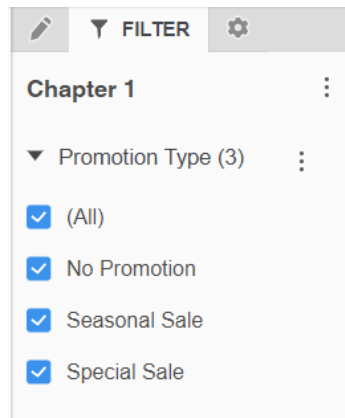
5   In the Filter panel, hover your cursor over Seasonal Sale and click **only**.

None of the revenue values change; they still calculate the combined revenue from both the seasonal sale and the special sale. Why?

By default, a conditional metric ignores any related attributes in the dossier filters.

- Related attributes are attributes in the same hierarchy as the attribute in the metric's filter. In this example, the same attribute is used in the filter on the Filter panel and in the conditional metric. If you place Promotion on the Filter panel, it is also ignored because it is in the same hierarchy (Promotions) as Promotion Type. If you place Call Center on the Filter

panel, the derived metrics calculate the promotional revenue for the selected call center; they are not in the same hierarchy as Promotion Type.

- The Revenue (Promos) metric always calculates the promotional revenue values for the attributes on the visualization (such as the different regions).

Ignoring related attributes in dossier filters ensures that the conditional metric always calculates according to the metric's filter, regardless of the filter selections. This process works for the Revenue (No Promos) metric because you always want it to calculate the non-promotional revenue, as a comparison to the promotional values. For the Revenue (Promos) metric, you want the metric's filter to interact with the dossier filters. Change how the metric's filter interacts with the dossier's filters.

Update the Revenue (Promos) metric to interact with the dossier's filters

1 In the Datasets panel, right-click **Revenue (Promos)** and select **Edit**.

2 In the Metric Editor, clear the **Ignore Attribute Filters from the Same Hierarchy** check box.

3 Click **Save**.

The promotional revenue for Central is reduced to $936,182, the amount for Seasonal Sales only, as compared to the total promotional revenue of $1,011,561. Non-promotional revenue remains at $4,017,805.
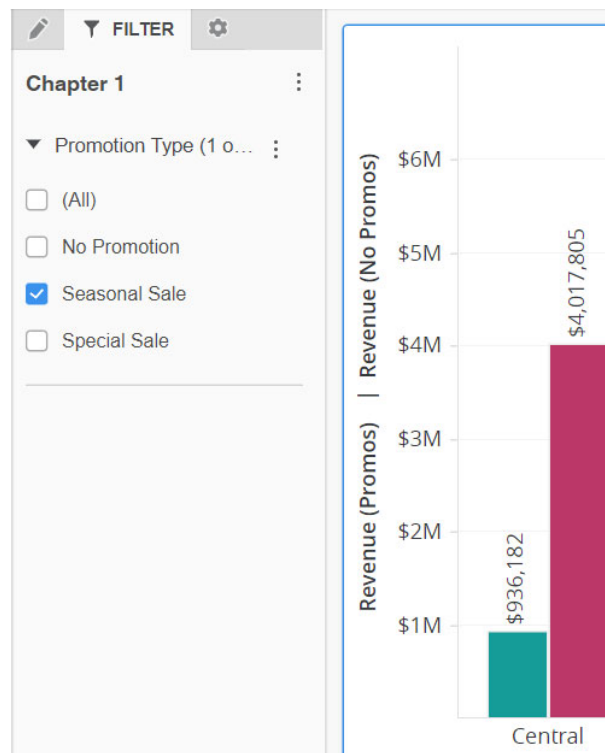
4 In the Filter panel, click **(All)** to display values for both promotions.

The promotional revenue for Central returns to $1,011,561.

Q: Which promotion is the most successful?

A: The Seasonal Sale promotion earns more revenue than the Special Sale promotion.

5 **Save** the dossier as **Regional Revenue Analysis - Filtered for Sales Promos** in the My Reports folder.

6 **Close** the dossier.

A conditional metric's filter setting applies to filters on the Filter panel, stand-alone filters, and designer filters.