

Creating Query Sets

Alchemer Dashboard is currently waitlist only. [Visit this page](#) to learn more about Dashboard or join the waitlist!

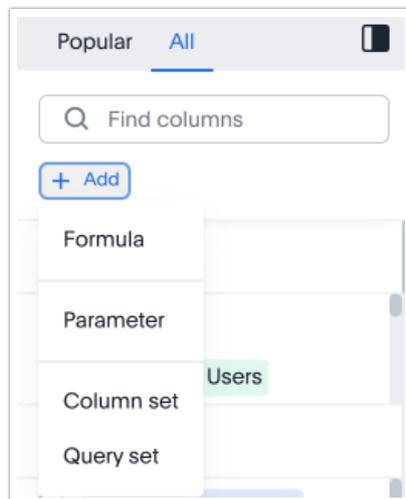
You can create sets, which can be used to classify values in a list that you can then reuse across multiple analyses. Chart, formulas and parameters are generally available only when in use in an chart, and must be remade if you navigate away from the chart without saving. Sets are reusable across many charts with a single point of definition. A set is built from a Worksheet however it does not belong to the Worksheet. When a set is initially created it is only available to the creator. When a set is used in a Chart or Dashboard, and this Chart or Dashboard is shared with specific users or groups of users, the set is then available for use as a community object.

To create a query set, first define the business question you wish to chart.

For example, you may want to create a set to show the first sale date per customer.

To create a column showcasing this defined list of values, follow these steps:

1. Navigate to the New Chart page by clicking the New Chart button.
2. Click **Add** and select **Query set**.



3. Select a column from the left side bar, or type a column name into the search bar.

Q Customer Code Amount sort by Amount descending fxRank

| Customer Code | Total Amount ↓ | fxRank |
|---------------|----------------|--------|
| THEBI | 393.7K | 1 |
| ANTON | 393.41K | 2 |
| BOTTM | 384.44K | 3 |
| LETSS | 372.94K | 4 |
| RICSU | 372.39K | 5 |
| SPECD | 370.91K | 6 |
| GODOS | 366.58K | 7 |
| LACOR | 353.25K | 8 |
| OLDWO | 347.25K | 9 |
| TORTU | 344.64K | 10 |
| KOENE | 337.57K | 11 |
| GOURL | 336.16K | 12 |
| LEHMS | 336.13K | 13 |
| HUNGC | 327.39K | 14 |
| REGGC | 323.31K | 15 |
| DUMON | 318.55K | 16 |
| GALED | 318.42K | 17 |

Showing 01 of 01 rows

4. Click Next.

5. In the Select name and description window, complete the following fields:

- Set name: Name your query set something meaningful.
- Set description: Describe what this query set represents.

Query set

Add set details

Set name and description

Set name

Set description

Cancel Back Next

6. Click **Next**.

7. Under **Select a base column**, select a **Base column**. Select the column you are using as the base of your list of values.

It is important that for each base column value there is only a single return column value. If this is not true, then the query generation will result in a many-to-many join. This may be desired. This should be reviewed as this will likely lead to incorrect values as result of overcounting.

8. Select either **Conditions**, **Bins** or **Column** under **Define groups for included query values**.

- **Conditions** allow you to create groups using operators.
- **Bins** allow you to create groups based on bins of specified sizes for aggregate results.
- **Column** allows you to select a column with output groups. Each row in the base column will be assigned to an output group based on its value from this column.

9. Enter your desired values for the conditions, bins or column.

- For conditions, you can choose to add multiple conditions by clicking **Add condition**.

Multiple conditions can be combined with so that all conditions should be true or alternatively only a single condition as true.

- For conditions, you can choose to add multiple groups by clicking **Add group**.

If multiple group conditions return true for an anchor column value then the order of the groups takes precedence. That is for each value only one condition will return true.

- For conditions, you can choose to show remaining values as either **Individual values** or as a **Group**. If you choose to group the remaining values, you can enter a name for the group. For example, you could create a query set that list each customer, their sales dollar amount and then add a formula that ranks the amount in descending order. You could then add groups to define Gold, Silver, Bronze levels where Gold is Ranked 1-10, Silver 11-50 and Bronze everyone else.

The screenshot shows a query builder interface. At the top, 'Base column' is set to 'Customer Code'. Below this, the section 'Define groups for included query values' is active. It contains two radio buttons: 'Conditions' (selected) and 'Column'. There are two group definitions:

- Gold:** Condition: fxRank Less than or equal to (s) 10. Includes a 'Remove group' link.
- Silver:** Condition: fxRank Between 11 50. Includes a 'Remove group' link.

Below the groups, there is a '+ Add group' button. At the bottom, the 'Show remaining values as' section has two radio buttons: 'Individual values' and 'Group' (selected). A text input field contains the name 'Bronze'.

10. Under **Define groups for excluded query values**, select either **Hide excluded values** or **Group excluded values**. If you group excluded values, you can give the group a custom name.

11. Click **Save**.

Limitations

- It is not possible to un-share a set.
- Sets are only shared with View permissions.

