

Filter Values

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Overview

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There are different options available when it comes to filter values. As a report writer you can choose to set:

1. **User Prompt** which allows the report reader to define the filter value to match when they run the report.
2. **Defined Value** which sets the value during the report creation process so the report is always restricted to the same result subset.
3. **Pre-Defined Period** which uses a date range on the report, which is always the same calculation, but dynamic by being relative to the report run date. This option is only available for date or timestamp fields.

User Prompt

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The default value for filters added to the Data step is **User Prompt**. If this setting is not changed, the user that runs the report will be prompted to provide filter values at the time of running the report. This is useful when the audience for a report is broad, meaning that each user may be interested in a different subset of results.

There are three methods for defining User Prompt filter values, and these depend on the formatting applied to the filter. bq. See [Filter Formatting](#) for more information.

1. **Manual Entry** - this allows the user to manually type the required value(s).
2. **List Selection** - this allows the user to select value(s) from a list provided. This list may either be provided by an [Org Ref Code](#) or [Cached Filters](#).
3. **Prompt Selection** - this allows the user to prompt the database for values and select from a list returned.

Manual Entry

Filters that require users to define values through manual entry can include single values, ranges, and lists.

The screenshot shows a 'Filter List' window with a title bar containing a maximize icon and a close 'X' icon. The window is divided into two main sections. The left section lists filter criteria: 'Gender Equal to', 'Demographic In List', 'Involved Date Between', and 'Average(Age at Camp) Between'. The right section, labeled 'Prompt', shows the input methods for each filter. For 'Gender Equal to', there is a single text input field. For 'Demographic In List', there are three stacked text input fields, each preceded by an 'x' icon, and an 'Add Item' button below them. For 'Involved Date Between', there are two date pickers (calendars) separated by an 'And' label. For 'Average(Age at Camp) Between', there are two stacked text input fields separated by an 'And' label. A blue arrow button is located at the bottom right of the window.

List Selection

The report writer can set filter value lists to be cached, meaning the system does not have to go back to the source database to retrieve a list of values each time the user runs the report. These lists can also be generated through the use of [Org Ref Code](#). Both types are defined through [Filter Formatting](#).

The screenshot shows a 'Filter List' dialog box with the following fields and values:

- Gender Equal to:** A dropdown menu with 'Female' selected.
- Demographic In List:** A list box containing 'Adventure', 'Culture', 'Family', 'Luxury', and 'Relaxation'. Below the list is a 'Select: All | None' link.
- Invoice Date Between:** Two date pickers with values '02/07/2013' and '23/01/2014', separated by an 'And' operator.
- Average(Age at Camp) Between:** A range slider with a minimum value of 1 and a maximum value of 100.
- At the bottom left is a 'Refresh Cached Filters' button with a circular arrow icon.
- At the bottom right is a blue arrow button.

Prompt Selection

In order to select from a list of values, where a list has not been cached, the user will have to prompt the database for a list.

1. Click on the prompt filter icon to the right of the filter

This screenshot shows the 'Filter List' dialog box with the 'Prompt' icon (a small blue icon with a speech bubble) highlighted next to the 'Demographic In List' field. A tooltip that says 'Prompt for filter values' is visible over the icon. The 'Add Item' button is also visible below the list box.

2. Select the required values from the displayed list

The screenshot shows a 'Demographic' selection dialog box. It features a search bar at the top, followed by a 'Sort Descending' link. Below this is a list of demographic categories with checkboxes:

- ☐ Adventure
- ☒ Culture
- ☒ Family
- ☐ Luxury
- ☐ Relaxation
- ☐ Sport

At the bottom, there is a 'Select: All | None' link and two buttons: 'Submit' and 'Cancel'.

Defined Value

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In order to define values for filters, you will need to:

1. Open the Filter Settings on the Data step and click on **Define Value**

And	Gender	Equal to	Define Value	
And	Demographic	In List	Define Value	
And	Invoiced Date	Between	Define Value	
And	Average(Age at Camp)	Between	Define Value	

2. You will now have multiple options, depending on what type of field you are using. Select an option that is **not** User Prompt

Select Filter Value

Please choose the filter value for this field below, or choose "User Prompt" to allow the user to select their own value:

☒ User Prompt
☐ Invoiced Date Between
☐ Pre-defined Period

Submit Cancel

3. Define the value(s) to be used and save

Select Filter Value

Please choose the filter value for this field below, or choose "User Prompt" to allow the user to select their own value:

☐ User Prompt
☒ Invoiced Date Between
☐ Pre-defined Period

Start Date: / /
☐ Current Date + Days

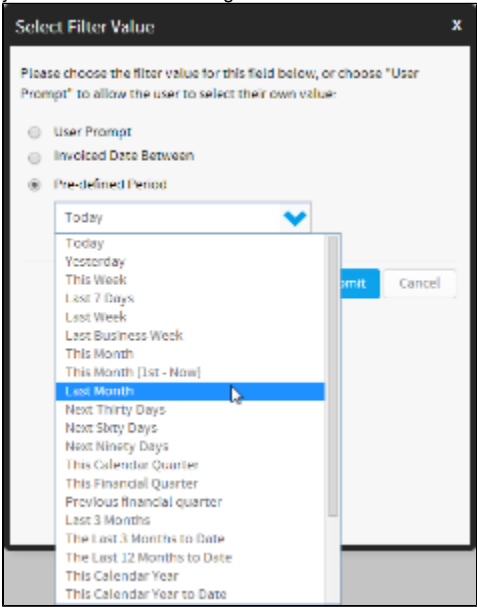
End Date: / /
☐ Current Date + Days

Submit Cancel

Pre-Defined Period

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When using date field an advanced filter option becomes available, which provides you with a list of date/range calculations to select from. Simply define a value (as outlined above) and select the **Pre-defined Period** option. When using date field an advanced filter option becomes available, which provides you with a list of date/range calculations to select from. Simply define a value (as outlined above) and select the **Pre-defined Period** option.



See [Date Filter Periods](#) for more information.