

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 'Filters' panel with four filter rows. Each row has a field name, a comparison operator, and input fields. The first row is for 'Gender' with the operator 'Equal to' and a single text input field. The second row is for 'Demographic' with the operator 'In List', a multiplier 'x', and a text input field with a search icon. The third row is for 'Invoiced Date' with the operator 'Between', two date input fields, and a calendar icon. The fourth row is for 'Average Age a...' with the operator 'Between', a 'Min' input field, and a 'Max' input field. At the bottom are 'Reset' and 'Go' buttons.

Field	Operator	Input Fields
Gender	Equal to	Single text input
Demographic	In List	Text input with search icon, preceded by a multiplier 'x'
Invoiced Date	Between	Two date input fields with a calendar icon
Average Age a...	Between	Min and Max text input fields

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](#).

Filters

Gender Equal to
Female

Demographic In List
Adventure
Relaxation
Family
Culture
Luxury

Invoiced Date Between
25/04/2009
13/09/2015

Average Age a... Between
1 100

Reset Go

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

Demographic In List

×

○

2. Select the required values from the displayed list

Search Filter Values

Demographic In List

Adventure
Culture
☒ Family
Luxury
Relaxation
☒ Sport

Submit

3. You will now see your list populated with your selected values

The screenshot shows a filter interface with the title 'Demographic' and a link 'In List'. Below the title, there are two input fields, each with a blue 'x' icon to its left. The first field contains the text 'Family' and the second field contains the text 'Sport'. Below these fields is a search bar with a magnifying glass icon.

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

The screenshot shows the 'Filter Settings' interface. On the left, there are four filter rows, each starting with 'And' and a blue dropdown arrow. The filters are: 'Gender' (yellow square icon), 'Demographic' (yellow square icon), 'Invoiced Date' (yellow square icon), and 'Average Age at Camp' (blue percentage icon). To the right of each filter name is a comparison operator (Equal to, In List, Between, Between) and a blue dropdown arrow. Further right is a 'Define Value' link and a funnel icon. A mouse cursor is hovering over the 'Define Value' link for the 'Invoiced Date' filter.

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

The screenshot shows a dialog box titled 'Select Filter Value' with a close button (X) in the top right corner. The dialog box has a blue header bar. Below the header, the text 'Invoiced Date Between' is displayed. There are three radio button options: 'User Prompt' (selected), 'Defined Value', and 'Pre-defined Period'. Below these options is a blue information icon (i) and a text box that says 'Allow users to specify the filter value(s) when running the report.' At the bottom of the dialog box is a blue 'Submit' button.

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

The screenshot shows a dialog box titled "Select Filter Value" with a close button (X) in the top right corner. The main heading is "Invoiced Date" followed by the word "Between" in blue. There are three radio button options: "User Prompt", "Defined Value" (which is selected), and "Pre-defined Period". Below the "Defined Value" option, there are two "Dynamic Date" sections. Each section has a toggle switch that is currently turned off. Each section contains a text input field with the placeholder "dd/mm/yyyy" and a calendar icon to its right. A mouse cursor is hovering over the second "Dynamic Date" toggle switch. At the bottom of the dialog is a blue "Submit" button.

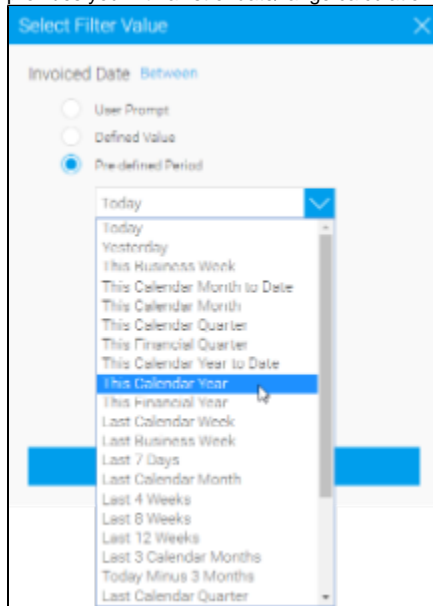
4. Alternatively, define dynamic values (relative to the date the report is run) and submit

The screenshot shows the same "Select Filter Value" dialog box. The "Defined Value" radio button is selected. The "Dynamic Date" toggle switches are now turned on. Each "Dynamic Date" section has a "Current Date" label, a plus sign, a dropdown menu (showing a downward arrow), a text input field, the word "Days", and another dropdown menu (showing a downward arrow). A mouse cursor is hovering over the first "Defined Value" radio button. At the bottom is a blue "Submit" button.

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.

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