

Filters

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Overview

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Report filters allow you to limit the amount of data that is returned, to the specific subset you require.

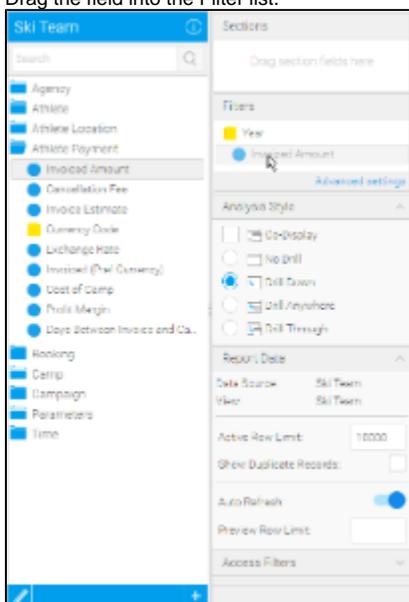
You may decide that you don't want to include all the data in a document. Applying conditions or filters to queries allows you to include only the data you need. The following illustrations show how a condition or filter works.

Without Filter	With Booking Method Filter																																																																							
This table lists each step of the booking process for all Booking Methods.	This table has been filtered to only show steps of the booking process wh																																																																							
<table border="1"> <thead> <tr> <th>Booking Method</th> <th>Booking Step</th> <th>Athletes</th> </tr> </thead> <tbody> <tr><td>Email</td><td>1. Enquiry</td><td>85</td></tr> <tr><td>Email</td><td>2. Contract</td><td>48</td></tr> <tr><td>Email</td><td>3. Invoice</td><td>113</td></tr> <tr><td>Email</td><td>4. Payment</td><td>47</td></tr> <tr><td>Email</td><td>5. Receipt</td><td>19</td></tr> <tr><td>Email</td><td>6. Trip</td><td>1271</td></tr> <tr><td>Phone</td><td>1. Enquiry</td><td>58</td></tr> <tr><td>Phone</td><td>2. Contract</td><td>19</td></tr> <tr><td>Phone</td><td>3. Invoice</td><td>70</td></tr> <tr><td>Phone</td><td>4. Payment</td><td>34</td></tr> <tr><td>Phone</td><td>5. Receipt</td><td>17</td></tr> <tr><td>Phone</td><td>6. Trip</td><td>1112</td></tr> <tr><td>Web Site</td><td>1. Enquiry</td><td>55</td></tr> <tr><td>Web Site</td><td>2. Contract</td><td>19</td></tr> <tr><td>Web Site</td><td>3. Invoice</td><td>80</td></tr> <tr><td>Web Site</td><td>4. Payment</td><td>30</td></tr> <tr><td>Web Site</td><td>5. Receipt</td><td>21</td></tr> <tr><td>Web Site</td><td>6. Trip</td><td>789</td></tr> </tbody> </table>	Booking Method	Booking Step	Athletes	Email	1. Enquiry	85	Email	2. Contract	48	Email	3. Invoice	113	Email	4. Payment	47	Email	5. Receipt	19	Email	6. Trip	1271	Phone	1. Enquiry	58	Phone	2. Contract	19	Phone	3. Invoice	70	Phone	4. Payment	34	Phone	5. Receipt	17	Phone	6. Trip	1112	Web Site	1. Enquiry	55	Web Site	2. Contract	19	Web Site	3. Invoice	80	Web Site	4. Payment	30	Web Site	5. Receipt	21	Web Site	6. Trip	789	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Filters Booking Method Email</p> <p>Booking Meth... Equal to</p> <p>Email ▼</p> <p style="text-align: right;">Reset Go</p> </div> <div style="margin-top: 10px;"> <p>Draft Report Ski Team, 17/10/2016 1</p> <table border="1"> <thead> <tr> <th>Booking Method</th> <th>E</th> </tr> </thead> <tbody> <tr><td>Email</td><td>1.</td></tr> <tr><td>Email</td><td>2.</td></tr> <tr><td>Email</td><td>3.</td></tr> <tr><td>Email</td><td>4.</td></tr> <tr><td>Email</td><td>5.</td></tr> <tr><td>Email</td><td>6.</td></tr> </tbody> </table> </div>	Booking Method	E	Email	1.	Email	2.	Email	3.	Email	4.	Email	5.	Email	6.
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Adding Filters

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1. Locate the field you wish to use as a filter either by;
 - a. Keyword Search at the top of the View Fields List
 - b. Opening the field category it's located in
2. Select the field by clicking on it. If you have multiple fields to add hold down the Ctrl/Command or Shift keys while selecting the fields.
3. Drag the field into the Filter list.



You will now be able to preview your filter by using the panel on the right of the Data step page. Continue adding fields as required. Once you have all the filters you required you will need to define the logic and conditions to be used with them, values, and formatting. See [Filter Settings](#) and [Filter Formatting](#) for more information.

Aggregate Filters

Fields can have aggregations applied in order to filter on values such as the sum of received amount. For example if you filter on received amount you will be filtering on each record, filtering on the aggregate value would filter on the total for the sum of the region.

Aggregate filters are applied through the field drop down list once it's added to the filters list on the Data step.

Filters	Table Column	Table Value
Year	Email	1. Enquiry 85
Sum Invoiced Amount	Email	2. Contract 48
	Email	3. Invoice 113
		4. Payment 47
		Receipt 19

Aggregation	Value
None	
Sum	(Between)
Average	(User Prompt)
Min	
Max	
Count	
Count Distinct	

Filter Types

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View Defined Calculated Field

View defined filters are created to assist users adding filters or conditions to their reports. These filters are especially useful in instances where:

1. A filter is regularly used by report writers, such as Location, Business Unit, or Date Range
2. There are particular complex filter conditions or calculations that could be defined once at the view, rather than once per report

View defined filters are indicated by the  icon in the Fields List of the Report Builder Data step. To include a view defined filter in your report, select it from your field list and drag it into the Filters list. You will not be able to edit the contents of the filter through the report builder as they are defined at the view level.

See [Calculated Filters](#) for more information.

View Defined Filter Group

View defined filter groups are created to provide the user with common sets of filters when building reports. These filters are formatted and defined at the view to save the user time rebuilding sets and their possible relationships for each use in a report.

View defined filter groups are indicated by the  icon in the Fields List of the Report Builder Data step. To include a filter group in your report, select it from your field list and drag it into the Filters list. You will not be able to edit the contents of the filter set through the report builder as they are defined at the view level.

See [Filter Groups](#) for more information.

Report Defined Filter

Report defined filters are fields added to the Filter list of the Report Builder Data step by the report writer. The writer then defines the conditions and values for the filter, not allowing the report user to provide values.

User Defined Filter

User defined filters are fields added to the Filter list of the Report Builder Data step by the report writer. The writer then defines the conditions and formatting of the filter, but leaves the values set to User Prompt. This means that the report user will provide values for the filters when they run the report.

See [User Prompt](#) for more information.

Parameter

Parameters are a special type of field, defined in the view, added to the Filter list of the Report Data step by the report writer. Parameters are indicated by the  icon in the Fields List of the Report Builder Data step. The parameter should then be referenced by other filters or calculated fields. Parameter settings are defined at the view and cannot be modified in the report builder.

Parameters are designed to prompt the user for a value, much like [User Defined Filters](#) mentioned above, then pass the value to other components of the report.

See [Parameters](#) for more information.

Source Filter

Source Filters are defined at the Data Source connection level and then applied to views for use on reports. These are filters designed to restrict results in a report based on the user viewing it. For example, A sales person from Australia would see the Business Sales Report filtered by Australia, where a sales manager for Australia & New Zealand would see the report filtered to see Australia and New Zealand sales records.

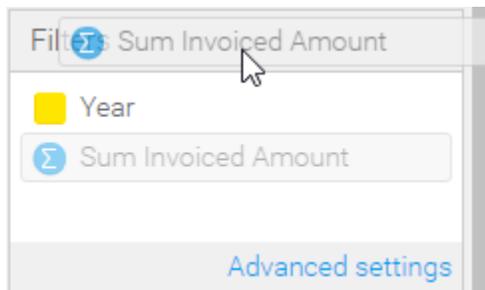
Source Filters can be disabled/enabled in the Report Builder by advanced report writers who have the appropriate role permission enabled, otherwise the filters are designed to be applied, but not seen by standard writers and users.

See [Restricting Data with Access Filters](#) for more information.

Removing Filters

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Select the field in the Filters list and drag it to an area of the page that cannot contain a field (as pictured)



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