

# 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

This table lists each step of the booking process for all Booking Methods.

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

With Booking Method Filter

This table has been filtered to only show steps of the booking process wh

Filters

Booking Meth... Equal to

Email

ResetGo

Booking Method Email

Draft Report

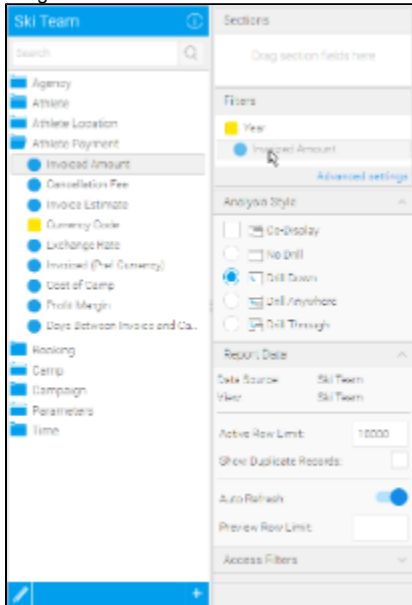
Ski Team, 17/10/2016 1

Booking Method	E
Email	1
Email	2
Email	3
Email	4
Email	5
Email	6

## 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.

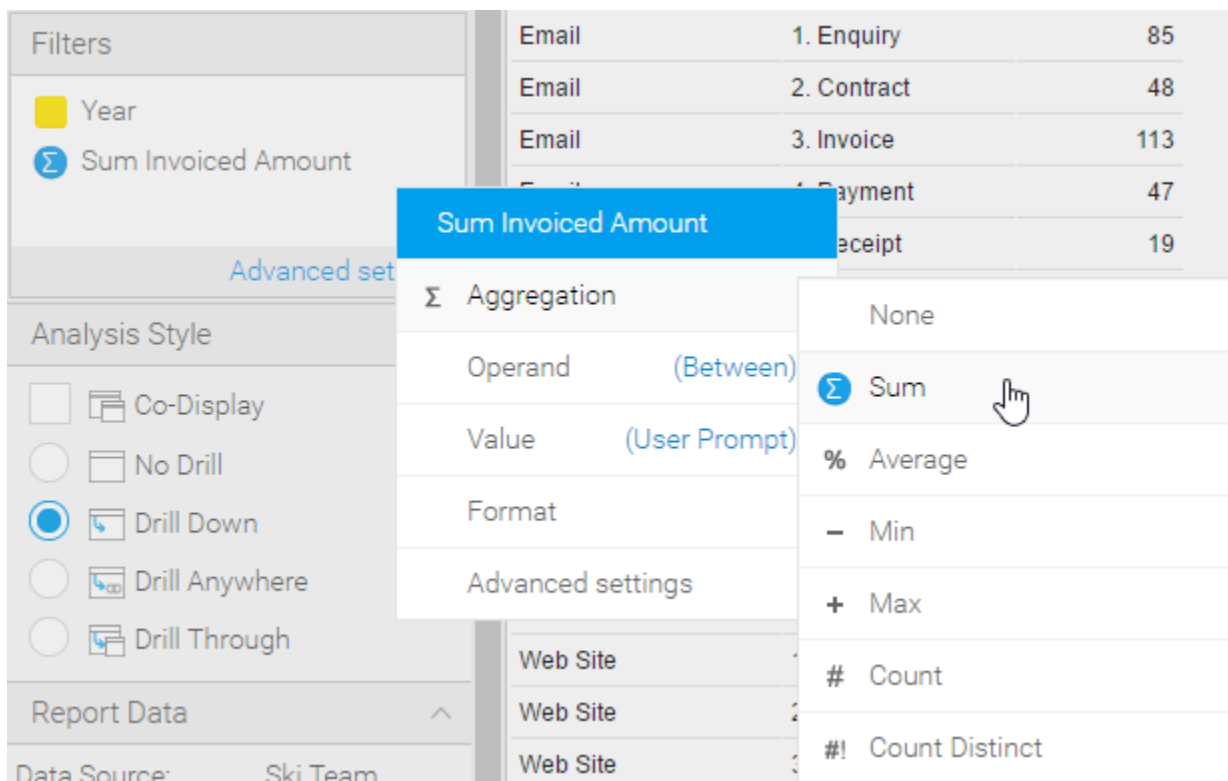


You will now be able to preview your filter by using the panel on the right of the Data step page. Continue adding fields as required. Once you have all the filters you required you will need to define the logic and conditions to be used with them, values, and formatting. See [Filter Settings](#) and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




## 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.

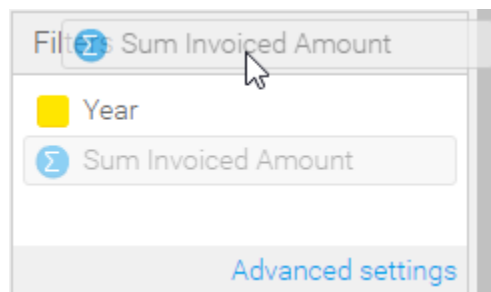
Source Filters can be disabled/enabled in the Report Builder by advanced report writers who have the appropriate role permission enabled, otherwise the filters are designed to be applied, but not seen by standard writers and users.

See [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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