

Filter Values

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Overview

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

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. 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 a [reference code](#) or [cached filters](#).
3. Prompt Selection - this allows the user to prompt the database for values and select from a list returned.

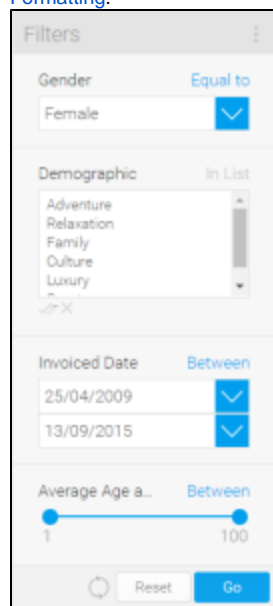
Manual Entry

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 with a search icon. The second row is for 'Demographic' with the operator 'In List', a list icon (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.

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 [reference codes](#). Both types are defined through [Filter Formatting](#).



The screenshot shows a 'Filters' panel with the following settings:

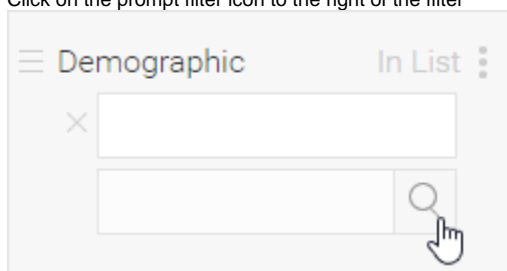
- Gender:** Set to 'Female' with an 'Equal to' operator.
- Demographic:** Set to 'In List' with a dropdown menu showing 'Adventure', 'Relaxation', 'Family', 'Culture', and 'Luxury'.
- Invoiced Date:** Set to 'Between' with dates '25/04/2009' and '13/09/2015'.
- Average Age a...:** Set to 'Between' with a slider range from 1 to 100.

At the bottom, there are 'Reset' and 'Go' buttons.

Prompt Selection

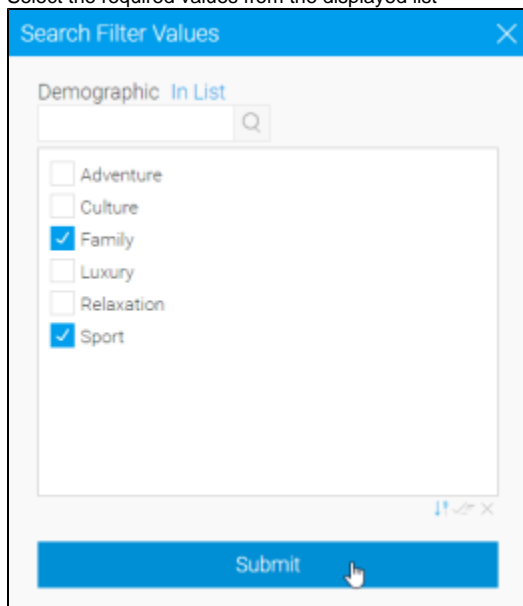
In order to select from a list of values, where a list has not been cached, the user will have to prompt the database for a list.

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



This screenshot shows the 'Demographic' filter set to 'In List'. A hand icon is pointing to a small circular prompt icon located to the right of the filter's value input field.

2. Select the required values from the displayed list



The screenshot shows a 'Search Filter Values' dialog box for the 'Demographic' filter. It contains a search bar and a list of values with checkboxes:

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

At the bottom, there is a 'Submit' button.

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

The screenshot shows a filter interface for the 'Demographic' field. It has a title 'Demographic' and a subtitle 'In List'. Below the title, there are two input fields, each with a blue 'x' icon to its left. The first input field contains the text 'Family', and the second input field contains the text 'Sport'. Below these input 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. It has a table with four rows, each representing a filter rule. The first column contains the word 'And' followed by a blue dropdown arrow. The second column contains the field name: 'Gender', 'Demographic', 'Invoiced Date', and 'Average Age at Camp'. The third column contains the operator: 'Equal to', 'In List', 'Between', and 'Between'. The fourth column contains a blue dropdown arrow. The fifth column contains the text 'Define Value'. The sixth column contains a funnel icon. A mouse cursor is hovering over the 'Define Value' text in the 'Invoiced Date' row.

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'. It has a blue header bar with a close button (X). Below the header, it says 'Invoiced Date Between'. There are three radio buttons: 'User Prompt' (selected), 'Defined Value', and 'Pre-defined Period'. Below the radio buttons is an 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

Select Filter Value

Invoiced Date Between

☐ User Prompt

☒ Defined Value

Dynamic Date ☐

dd/mm/yyyy

And

Dynamic Date ☐

dd/mm/yyyy

☐ Pre-defined Period

Submit

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

Select Filter Value

Invoiced Date Between

☐ User Prompt

☒ Defined Value

Dynamic Date ☒

Current Date + Days

And

Dynamic Date ☒

Current Date + Days

☐ Pre-defined Period

Submit

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.

The screenshot shows a dialog box titled "Select Filter Value" with a close button (X) in the top right corner. Inside the dialog, the text "Invoiced Date" is followed by the word "Between" in blue. Below this, there are three radio button options: "User Prompt", "Defined Value", and "Pre-defined Period". The "Pre-defined Period" option is selected, indicated by a blue dot. Below the radio buttons is a list box containing various date and time periods. The list starts with "Today" and ends with "Last Calendar Quarter". The "This Calendar Year" option is highlighted with a blue background and a mouse cursor is pointing at it. The list box has a scroll bar on the right side.

Filter Value
Today
Yesterday
This Business Week
This Calendar Month to Date
This Calendar Month
This Calendar Quarter
This Financial Quarter
This Calendar Year to Date
This Calendar Year
This Financial Year
Last Calendar Week
Last Business Week
Last 7 Days
Last Calendar Month
Last 4 Weeks
Last 8 Weeks
Last 12 Weeks
Last 3 Calendar Months
Today Minus 3 Months
Last Calendar Quarter

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

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