Present Filters

Overview

Filters enable reports on your presentations to be filtered by a set of values. For example, a region filter will allow you to consume region-specific data on the same presentation. Yellowfin allows the use of single filters, as well as filter groups.

For filters to work on your presentation, you must add reports with **user-prompt filters**. These filters can be used via the left side navigation filter panel to anywhere on the presentation slide.

Filter widgets

Filters are added to the presentation through a filter widget. Access the filter widget by clicking on the Filters button on the left side of the presentation.

The following types of filter widgets are available:

- **Vertical Filter List:** Displays the filter on your presentation in a vertically aligned layout.
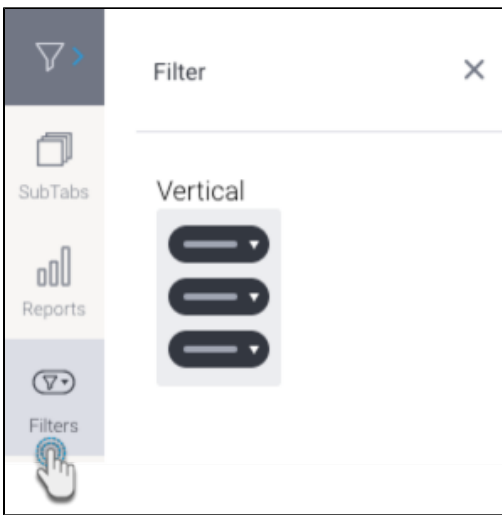
Left side navigation filters

Filters can also be added to presentations without the use of a widget by using the left side navigation filters. This provides users with an alternate style of displaying filters in a slide out panel, rather than permanently displaying them on the presentation.

Click on the top **filter** button on the left to access a list of filters to be added directly to the presentation.


Note that to see this left side navigation filter button, the **Left Filters** toggle in a presentation properties panel should be enabled.

Filter panel

You can add a single filter or filter groups to a filter panel through the filter widget. (See tutorial on how to add below). Once added, filters will display in the panel available for presentation builders and end users to use on the presentation.

The diagram and table below provide a basic understanding of a filter panel.
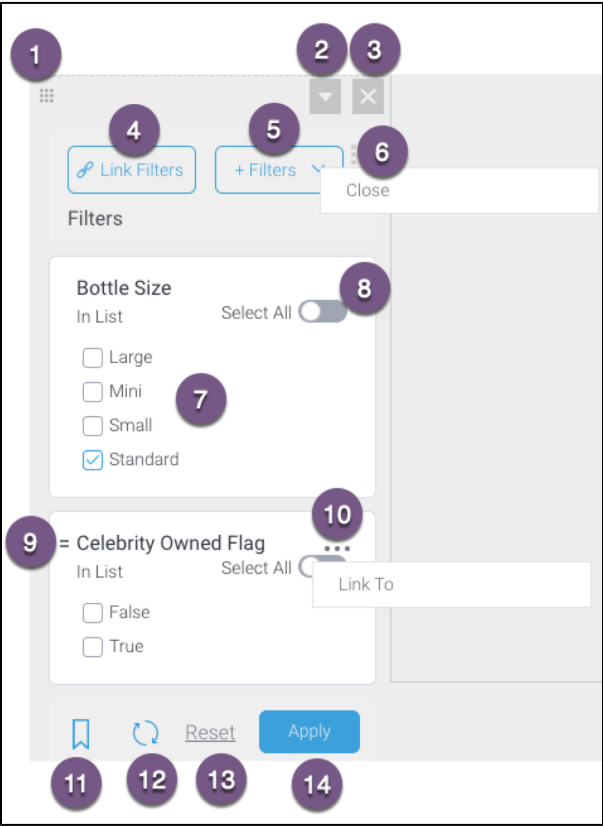
| Number	Feature	Description
1	Drag filter panel	Click and drag this icon to move the filter panel to another location.
2	Filter properties panel	This button brings up the filter properties panel. Learn more.
3	Remove filter panel	Click on this button to delete the filter panel.
4	Link Filters	This button allows you to open set up for manually linking all or multiple filters. (A separate option is available to link individual filters.) Learn more.

| 5	+ Filters	This button allows you to add user prompt report filters to the filter panel. Options include adding individual filters, or a filter group. Learn more.
6	Menu option	Click on this menu option to perform actions on this filter panel. Option includes: • **Close:** this option allows you to collapse the filter panel, maximising the amount of room allocated to the display of your report. The filters can always be accessed again by clicking on the left side navigation filter button.
7	Filter	The filter(s) added to this panel. Select a filter value or 'all' using the toggle (see below).
8	Select all	Enables users to select all filter options in a list filter. This appears only if you have a list.
9	Re-order filter	Use the icon to drag and move a filter above or below another.
10	Individual filter menu	Brings up a menu for the selected filter. Option includes: • **Link To:** allows you to manually link an individual filter to other reports on the presentation.
11	Present filter bookmarks	Allows you to bookmark a filtered presentations, or apply a saved bookmark. Learn more.
12	Refresh cached filters	Clicking this button refreshes the cached filter values, but it does not re-run the report (see **Apply** below). Note that this button will only appear if your filter contains cached values.
13	Reset filter	Removes selected filter values to reset filters to their default values or no selection.
14	Apply	Allows you to apply selected filter values.
Note: Features **11**, **12**, **13**, and **14** together make up the filter control. These always appear at the end of a filter panel, for the use of presentation users.		

How to use a Filter Widget

This tutorial shows how to add filters to a presentation using a Filter Widget. Before you begin, add reports that contain user prompt filters to your presentation.

1. Click on the **Filters** icon on your presentation builder to bring up the Filter Widget list.
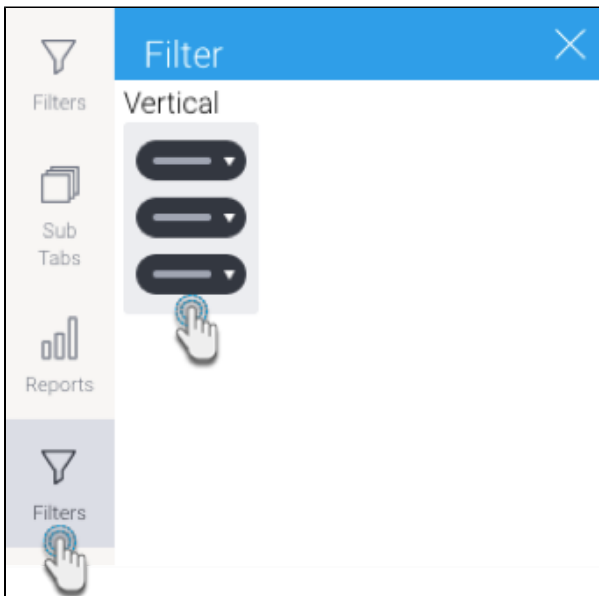
2. Then drag a Filter Widget onto the presentation at the exact location you would like to display the filter.
3. A filter panel will appear on the location it was dropped. (Side note: click here for an overview of this filter panel).
4. Add report filters to this panel by clicking on the **+ Filters** button.
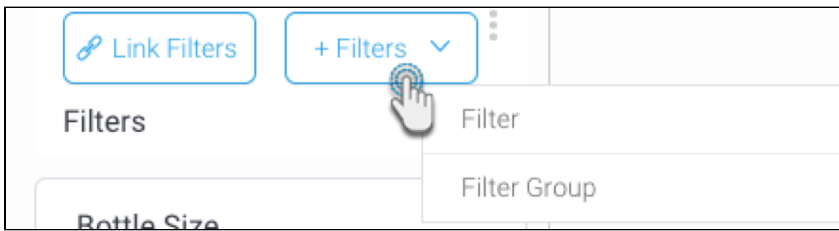
5. Choose Filter to add individual filters (you can add multiple as well), or Filter Group to add a filter group. (In our example, we will choose Filter.)
6. A pop up displaying available report filters will appear. This allows you to choose which filters to add from any of the reports.
   Note: If none of the reports contain any filters, then the following notification will appear on this popup. Click on the **Add a report** link to open the Reports tab on the left side.
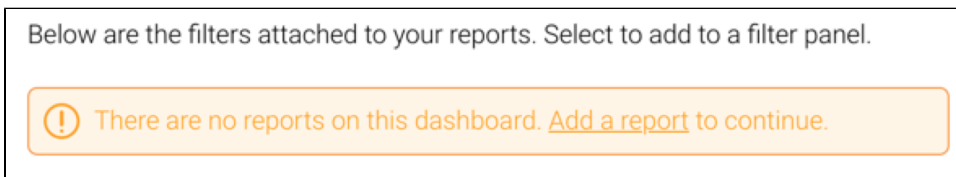
7. Click on one or more filter checkboxes to select those that you want to add. Alternatively, enable the **Select All** toggle to select all the filters on this pop up. You can undo this selection by choosing the **Clear All**.
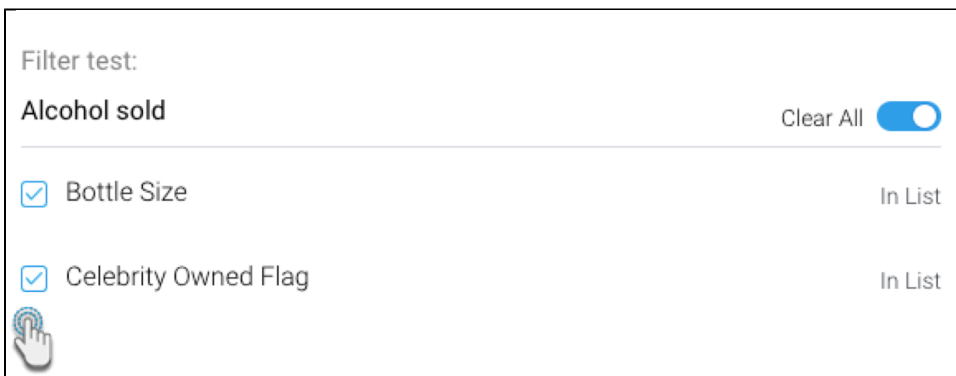
8. Click the **Save** button at the bottom of the pop-up to add the filters.

9. The filters will then appear in the filter panel on the presentation, as shown in the example below.

Add filter default values

You can set default values for your presentation filters. refer to this section.

Change filter entry display

Filter entries or values will appear on presentations with the display style applied on them in the report. However, the entry display type of certain filters can be changed in the Present builder, without having to change it in the report first. Entry styles can be changed to checkboxes, lists, pop-ups, drop downs or radio buttons, depending on the filter type.

This is possible if the report filter meets all of the following criteria:

- The filter is formatted to display its values in the form of a list. Ensure that the *Value Entry Method* of the filter is selected as *'Value List Selection'* in the report.
- The filter is *not* a date filter with predefined or cached values.

How to change:

1. Add the filters using the Filter Widget.

2. Click on the ellipses ● ● ● button on an individual filter to bring up its menu, and select the **Entry Style** option.
3. Choose the new entry style from the list of options.
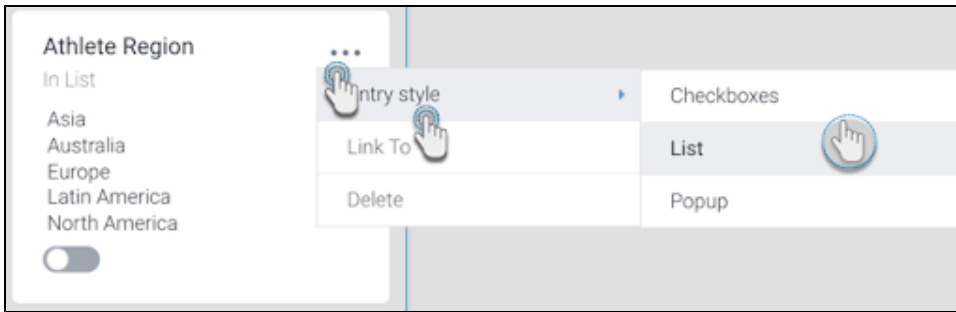
4. The filter entries will be instantly updated.

Filter properties

The filter properties panel lets you configure the following settings.

Property name	Description
Name	Name of the filter. This can be edited as well. This name appears in Code Mode, making it easy to edit the filter code.
Horizontal	Enable this to display your filter in a horizontal alignment. By default filters are vertically aligned.
Hide reset link	Allows you to hide the filter reset option.
Hide display name	Allows you to hide the filter display name.
Display name	Display name of the filter, that appears on the filter panel. This can be edited.
Hide control panel	Allows you to hide control buttons on a filter panel for the end user. These include bookmark, reset, and apply buttons. Present end users will not be able to use these filter features.
Auto run filters	Enable this toggle to automatically run reports when filter values are selected or changed, without using the 'Apply' button. *Note:* Administrators can also set a time delay, where the reports are run after a specified time once values are selected. This is

	done through the Content Settings > Report Settings > Builder Setting > Filter Run Delay setting.
Apply button location	Allows you to specify the location of the filter control panel, including the 'Apply' button. You can choose to display the button and controls at the top or bottom of the filter panel, or in both locations.
Actions	
Click Event	Select an event that will trigger when the selected widget is clicked. Event options include: • **None:** Use this if you do not wish the widget to trigger an event. • **Next sub tab:** Navigates the user to the next tab within the same presentation. • **Previous sub tab:** Navigates the user to the previous tab within the same presentation. • **Reset filters:** Allows users to clear filter selections, or in case default values are set, then reset filters to their default values. • **Reset presentation:** Refreshes the presentation by clearing any user interactivity performed on it, as well as removing all applied filters. • **Go to report:** Navigates users to a specified report. This report can be specified by providing its report UUID. • **Go to sub tab:** Navigates to any sub tab in the same presentation, where the sub tab is specified by its order number. For example to jump to the forth sub tab, enter 4 in the sub tab # field. Note that the sub tab order starts from number 1. • **Go to URL:** Navigates to an external link or page using the specified URL. You can also choose to open the new link in a new tab or window or in the current window. (See the below URL and Target settings for more information.)
Report ID	If navigating to a report using the 'Go to report' click event, provide the UUID of the report.
Sub Tab #	If navigating to a sub tab using the 'Go to sub tab' click event, enter the order number of the sub tab.
URL	If navigating to an external page using the 'Go to URL' click event, provide the full URL of the page.
Target	If navigating to an external page using the 'Go to URL' click event, specify the page target. Options include: • **New Tab/Window:** Opens the URL page in a new tab or window, depending on your browser's settings. Note: The default for most browsers is a window, however users can use computer shorts (Ctrl in Windows, and Cmd in Mac) to open in a new tab instead. • **Current Window:** Open the page in the current window. • **Parent Frame:** If Yellowfin is embedded as an iFrame, the new page will open (that is, its contents will appear) in the parent frame. Note that the parent frame is the one within which the Yellowfin frame is embedded. • **Current Frame:** If Yellowfin is embedded as an iFrame, the contents of the URL page will open in the current frame. Note that the current frame is the one which embeds Yellowfin.

Related topics