

# Dashboard Filters

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## Overview

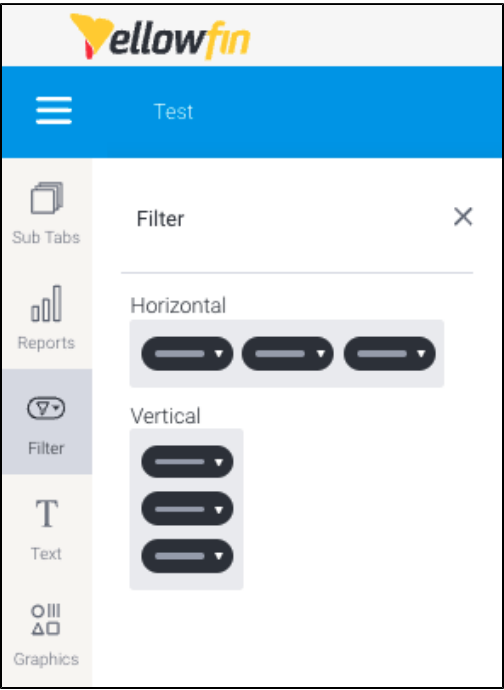
Filters enable reports on your dashboards to be filtered by a set of values. For example, a region filter will allow you to consume region-specific data on the same dashboard. Yellowfin allows the use of single filters, as well as filter groups. Note that filter groups cannot be used with horizontal filter widgets.

For filters to work on your dashboard, you must add reports with **user-prompt filters**. These filters can be used via the left side navigation filter panel. However, filter widgets can also be used to add filters to the global content containers, or anywhere on the dashboard canvas.

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## Filter widgets

Filters are added to the dashboard with a filter widget. Access the filter widget by clicking on the **Filters button** on the left side of the dashboard.



The following types of filter widgets are available:

- **Horizontal Filter List:** Displays the filter on your dashboard in a horizontally aligned layout.
- **Vertical Filter List:** Displays the filter on your dashboard in a vertically aligned layout.

The table below highlights the compatibility of each filter widget with filter types and dashboard layout options.

Feature compatibility	Horizontal filter list widget	Vertical filter list widget
Single filters	Yes	Yes
Filter groups	No	Yes
Canvas dashboard layout	Yes	Yes

Static dashboard layout	No	Yes
Global	No	Yes

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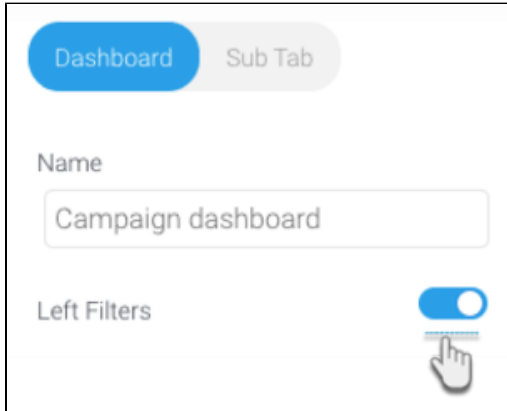
## Left side navigation filters

Filters can also be added to dashboards 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 dashboard.

To add a left side navigation filter, click on the top **filter** button on the left side of the screen to access a list of filters to be added directly to the dashboard.

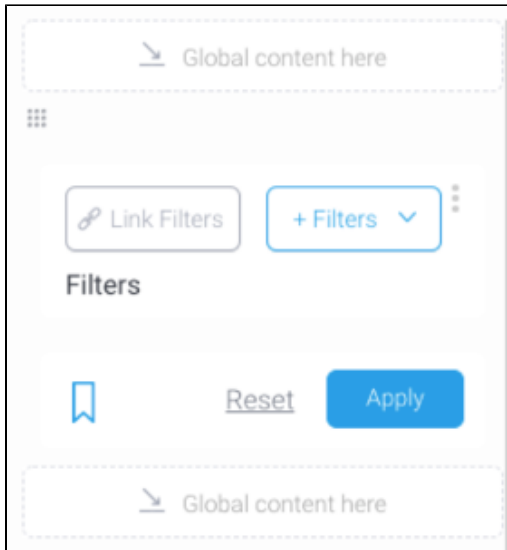


Note that to see this left side navigation filter button, the **Left Filters** toggle in a dashboard properties panel must be enabled.



## Global Filters

Vertical filter list widgets can be added to the left or right side content containers (i.e. on either side of the dashboard canvas or layout tab), or into the canvas tab (i.e. the middle section).



Those added to the side content containers can be considered 'global filters', as they will be visible for all sub tabs. However, you can also choose to add filters to the side containers without making them appear globally by turning off their respective **Global** settings.

Name

Vertical Filter List

Height

-1

Global

Filter widgets added to the canvas (i.e the middle section) will only be visible for that sub tab.

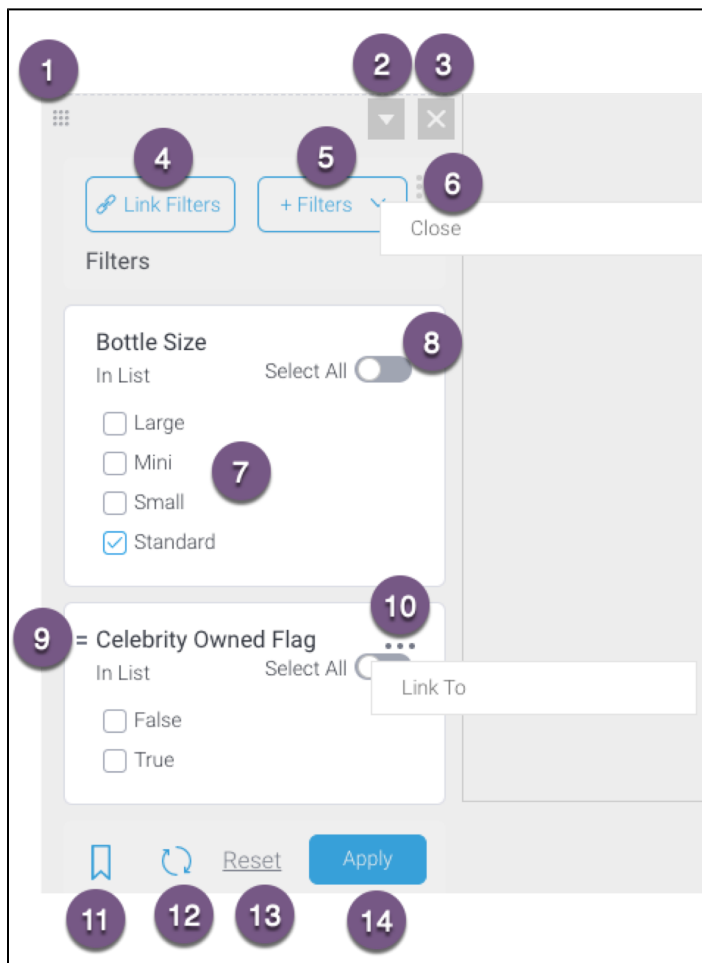
**Note:** this does not affect actual filter functionality, all linked filters in a dashboard will still work globally regardless of which sub tab or side content container they are in, meaning that linked reports will get updated according to a filter selection.

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## 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 [here](#)). Once added, filters will display in the panel available for dashboard builders and end users to use on the dashboard.

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. <a href="#">Learn more.</a>
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.) <a href="#">Learn more.</a>
5	+ Filters	This button allows you to add user prompt report filters to the filter panel. Options include adding <a href="#">individual filters</a> , or a <a href="#">filter group</a> . <a href="#">Learn more.</a>
6	Menu option	Click on this menu option to perform actions on this filter panel. Option includes: <ul style="list-style-type: none"> <li>• <b>Close:</b> 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.</li> </ul>
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: <ul style="list-style-type: none"> <li>• <b>Entry Style:</b> Specify how the filter entry values will be displayed for the user to select them. <a href="#">Learn more.</a></li> <li>• <b>Link To:</b> allows you to manually link an individual filter to other reports on the dashboard.</li> <li>• <b>Delete:</b> Delete the filter.</li> </ul>
11	Dashboard filter bookmarks	Allows you to bookmark a filtered dashboards, or apply a saved bookmark. <a href="#">Learn more.</a>
12	Refresh cached filters	Clicking this button refreshes the cached filter values, but it does not re-run the report (see <b>Apply</b> 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.



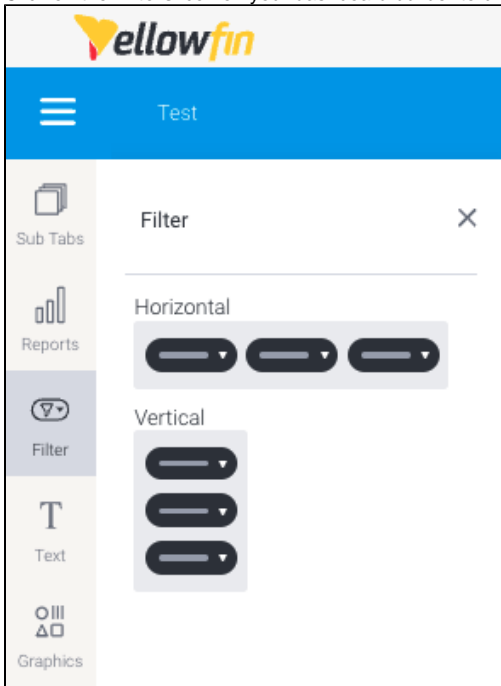
Features 11, 12, 13, and 14 together make up the filter control. These appear at the end of a filter panel by default, to be used by dashboard users.

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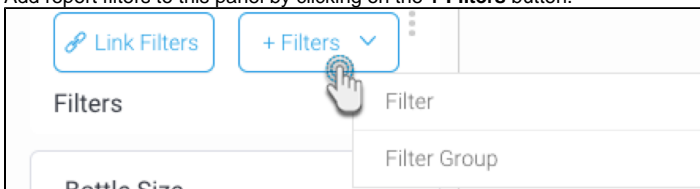
## How to use a Filter Widget

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

1. Click on the **Filters** icon on your dashboard builder to bring up the Filter Widget list.



2. Then drag a Filter Widget onto the dashboard at the exact location you would like to display the filter. This includes anywhere on the dashboard canvas, or within any of the global content containers (essential for global filter lists).
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:** The filters in this popup are categorized, first according to the dashboard sub tab, and then reports within the tab.

**Note 2:** 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.

Below are the filters attached to your reports. Select to add to a filter panel.

⚠ There are no reports on this dashboard. [Add a report](#) to continue.

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**.


Filter test:

Alcohol sold Clear All ☒

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☒ Bottle Size In List

☒ Celebrity Owned Flag In List



8. Click the **Save** button at the bottom of the pop-up to add the filters.

Cancel Save

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

Link Filters + Filters ⋮

Filters

**Bottle Size**

In List Select All ☐

☐ Large

☐ Mini

☒ Small



☐ Standard

**Celebrity Owned Flag**

In List Select All ☐

☐ False

☐ True

  [Reset](#) Apply

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## Add filter default values

You can set default values for your dashboard filters. refer to [this section](#).

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## Change filter entry display

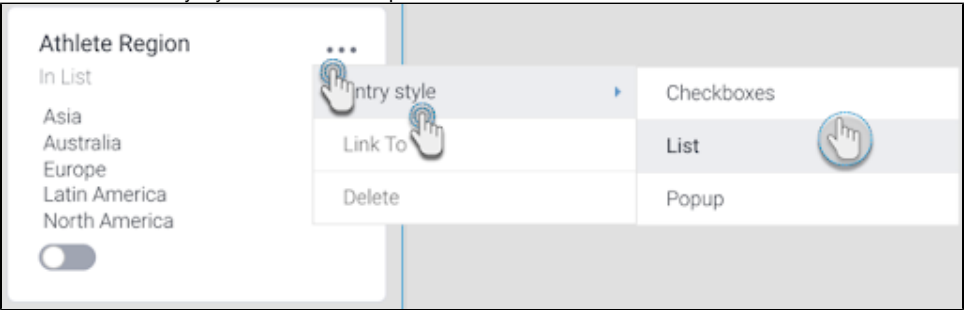
Filter entries or values will appear on dashboards with the display style applied on them in the report. However, the entry display type of certain filters can be changed in the Dashboard builder, without having to change it in the report first. Entry styles can be changed to checkboxes, lists, pop-ups,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

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## Filter properties

The filter properties panel lets you configure the following settings.

Widget Properties

Name

Vertical Filter List

Horizontal

Hide Reset Link

Hide Display Name

Display Name

Hide Control Panel

Auto run filters

Apply Button Location

Bottom

Size & Location

Background Formatting

Actions

Property name	Description
Name	Name of the filter. This can be edited. This name appears in the dashboard code mode, making it easy to edit the filter code.
Auto height	Automatically adjusts the height of a filter widget according to the items in it. Turn off to manually define the filter height in a text box. This option is only available if a filter widget is added to a static container. Note that the widget heights can also be changed by manually dragging the widget border, in which case this option will get switched off.  Note that this option is not available for horizontal filter list widgets.
Height	Height of the filter in pixels. This is available if the <i>Auto Height</i> option is turned off.  Note that this option is not available for horizontal filter list widgets.



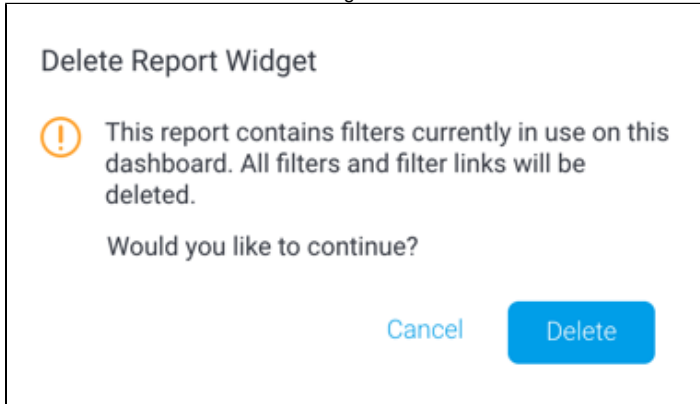
<b>Global</b>	<p>Enable this toggle to make your filter lists globally available. Global filters are present for all sub tabs in the dashboard. So if disabled, this filter will only be available for a specific sub tab.</p> <p>Note that this option only works for <b>vertical filter list widgets</b> positioned on the left or right global content containers, not filters added to a dashboard content area.</p>
<b>Hide reset link</b>	Allows you to hide the filter reset option.
<b>Hide display name</b>	Allows you to hide the filter display name.
<b>Display name</b>	Display name of the filter that appears on the filter panel. This can be edited.
<b>Hide control panel</b>	Allows you to hide control buttons on a filter panel for the end user. These include bookmark, reset, and apply buttons. Dashboard users will not be able to use these filter features.
<b>Auto run filters</b>	<p>Enable this toggle to automatically run reports when filter values are selected or changed, without using the 'Apply' button. 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 &gt; Report Settings &gt; Builder Setting &gt; Filter Run Delay setting.</p>
<b>List Size</b>	Allows you to set the number of values displayed in the list before scrolling is required. If a list contains fewer values than this number, the list size will shrink to fit accordingly.
<b>Apply button location</b>	<p>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.</p> <p>Note that this option is not available for horizontal filter list widgets.</p>
<b>Size &amp; Location</b>	
<b>X</b>	Specify the x coordinates of the top left corner of the filter widget, in order to position it exactly on your dashboard canvas.
<b>Y</b>	Specify the y coordinates of the top left corner of the filter widget, in order to position it exactly on your dashboard canvas.
<b>Width</b>	Specify the width of the filter widget, in pixels, in order to resize it exactly.
<b>Height</b>	<p>Specify the height of the filter widget, in pixels, in order to resize it exactly.</p> <p>Note that this option is not available for horizontal filter list widgets.</p>
<b>Corners</b>	This option allows you to define the roundness of your filter widget border corners. Tip: For maximum circular edges, enter half the value of the widget height. For example, if the height is 400 pixels, then set the edge value to 200 pixels. Moreover, any value greater than 200 for the edge, will have no further effect in this example.
<b>Rotation</b>	<p>Specify the amount you wish to rotate your widget clockwise, in degrees. To rotate anti-clockwise, specify a negative value.</p> <p>Note that this option is not available for horizontal filter list widgets.</p>
<b>Aspect ratio</b>	<p>Enable this toggle to maintain the aspect ratio. This means the widget maintains its shape, but its size can be increased or decreased.</p> <p>If this is disabled, the widget can be stretched out of shape either vertically or horizontally.</p>
<b>Lock widget</b>	Enable this toggle to lock the filter widget in its location. This stops you from moving or resizing the widget. This holds true even when selecting multiple widgets on the canvas.
<b>Background formatting</b>	
<b>Background color</b>	Allows you to specify a background color for the filter widget.
<b>Opacity</b>	Allows you to specify the transparency of the background color on the widget.
<b>Customize padding</b>	This option allows you to define a custom padding or buffer around the filter widget, in pixels. This includes padding for each side to the widget. If disabled, you can still define an overall padding size.
<b>Padding top</b>	When custom padding is enabled, this allows you to define padding to be added to the top of the widget.
<b>Padding bottom</b>	When custom padding is enabled, this allows you to define padding to be added to the bottom of the widget.
<b>Padding right</b>	When custom padding is enabled, this allows you to define padding to be added to the right of the widget.

<b>Padding left</b>	When custom padding is enabled, this allows you to define padding to be added to the left of the widget.
<b>Padding</b>	This allows you to define an overall padding size for the filter widget. This size, defined in pixels will be constant on each side of the widget. To add different sized padding on any of the sides, enable the Customize Padding option.
<b>Border width</b>	This allows you to specify the thickness of the widget border.  Note: to make the widget border visible, you must define values for all three border properties.
<b>Border style</b>	This allows you to select a style for the widget border. Options include: dashed, solid, dotted, groove, and more.
<b>Border color</b>	This allows you to specify the color of the widget border.
<b>Spread X</b>	This option shifts the position of the shadow blur along the X axis, in pixels.
<b>Spread Y</b>	This option shifts the position of the shadow blur along the Y axis, in pixels.
<b>Shadow blur</b>	This option allows you to define the sharpness of the shadow. The smaller the value, the sharper and more defined the shadow will be. For a blurry or softer shadow, provide a bigger value.
<b>Shadow color</b>	This option allows you to set a color for the shadow.
<b>Actions</b>	
<b>Click Event</b>	<p>Select an event that will trigger when the selected widget is clicked. Event options include:</p> <ul style="list-style-type: none"> <li>• <b>None:</b> Use this if you do not wish the widget to trigger an event.</li> <li>• <b>Ask a Question:</b> Click to display the Guided NLQ Ask a Question window. You can also define the default view for this action.</li> <li>• <b>Go to Report:</b> Navigates users to a specified report. This report can be specified by providing its report UUID.</li> <li>• <b>Go to URL:</b> 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.)</li> <li>• <b>Go to Sub Tab:</b> Navigates to any sub tab in the same dashboard, 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.</li> <li>• <b>Next Sub Tab:</b> Navigates the user to the next tab within the same dashboard.</li> <li>• <b>Previous Sub Tab:</b> Navigates the user to the previous tab within the same dashboard.</li> <li>• <b>Reset Filters:</b> Allows users to clear filter selections, or in case default values are set, then reset filters to their default values.</li> <li>• <b>Reset Dashboard:</b> Refreshes the dashboard by clearing any user interactivity performed on it, as well as removing all applied filters.</li> </ul>
<b>Report ID</b>	If navigating to a report using the 'Go to report' click event, provide the UUID of the report.
<b>Sub Tab #</b>	If navigating to a sub tab using the 'Go to sub tab' click event, enter the order number of the sub tab.
<b>URL</b>	If navigating to an external page using the 'Go to URL' click event, provide the full URL of the page.
<b>Target</b>	<p>If navigating to an external page using the 'Go to URL' click event, specify the page target. Options include:</p> <ul style="list-style-type: none"> <li>• <b>New Tab/Window:</b> 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.</li> <li>• <b>Current Window:</b> Open the page in the current window.</li> <li>• <b>Parent Frame:</b> 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.</li> <li>• <b>Current Frame:</b> 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.</li> </ul>

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## Deleting filter reports

Filters added to the dashboard are created from a report. If that report is deleted, all of its filters and filter links will also be deleted from the dashboard. However users will be shown a warning to alert them to this.



Click **Delete** if you would like to continue to delete the report.

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## Related topics

- [Filter groups](#)
- [Filter linking](#)
- [Dashboard filter bookmarks](#)
- [Default filter values](#)

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