

Filter Formatting

- [Overview](#)
- [General Settings](#)
- [Filter Settings](#)
 - [Dates](#)
 - [Dimensions](#)
 - [Metrics](#)

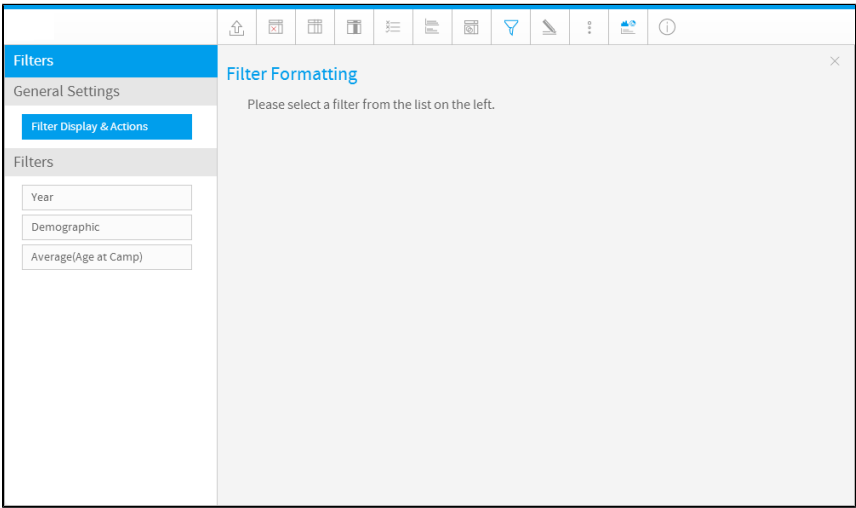
Overview

[top](#)

The Filter format tab contains a number of sections that you can use to format your filters.



Each of these sections is described below.



General Settings

[top](#)

The main formatting options for report filters are displayed below.

Filters

General Settings

Filter Display & Actions

Filters

Year

Demographic

Average(Age at Camp)

Filter Formatting

Format

Actions

Filter Refresh

Option	Description
Filter Display	Select the location for User Prompt filters to be displayed on the Report page.
Apply Link Location	Select the location for the apply button or link to be displayed. This is positioned within the Filter Display (defined above).
Apply Style	Use a button to apply selected filter values.
Filter Width	Select the length for User Prompt filter values display, allowing you to accommodate longer values.
Display Filter Values	Allows you to display a legend of filter values applied to the report.

Option	Description
Autorun Report on Load	Apply default and remembered filter values and run the report on first load.
Remember Filter Values	Remember filter values previously applied to this report and load on next viewing.
Drill Filters	Minimise display of filters applied to the report as part of the Drill Through process.
Minimise Filter Section	Minimise the filter display on first load of the report.
Filter Date Reference	Apply pre-defined date periods relative to the current date.

This option is only available if one or more filters have been set to use Cached Values.

Option	Description
Refresh	There are two available refresh options available for cached filters: Manual: allow users to manually refresh cached filter values. This should be used if values don't change regularly. Scheduled: schedule automatic cached filter values refresh. This should be used if values change often.

If the refresh setting is defined as **Scheduled** then the following scheduling options will become available. This schedule will apply to **all** cached filters on this report.

Refresh

Schedule automatic cached filter values refresh. This should be used if values change often.

Manual ☐ Scheduled ☒

Schedule

Weekly

Saturday

Australia

Sydney (+10:0...

5 pm

:30

Less ↑

Note: When refreshing cached filters in a multi-tenancy set up, note that if this is initiated from the default organization or through a scheduled task, then the filters in all the organizations will be refreshed. But if done from a specific client organization, then only the filters of that organization will be refreshed.

Filter Settings

[top](#)

Dates

Filters

General Settings

Filter Display & Actions

Filters

Invoiced Date

Agency Region

Sum Invoiced Amount

Filter Formatting

Display

Entry style

Value Entry Method

The user will select values for the filter from a pre-defined list.

Manual User Entry

Value List Selection

Value List Setup

Create a list of values by caching the current contents of the field in the database.

Pre-defined Periods

Cached Values

Cached Values On Demand

Custom Query

Custom Query Cached On Demand

List Display Type

Define how the user will select values for this filter.

Drop Down

Popup

Pre-filter by Aggregated Metrics

Cache the filter values, including any aggregated metric filters that may be applied to the report. This will ensure the HAVING clause is applied during the caching process.

987 values cached.

Refresh Now

Sort

Sort the list of values in ascending order.

Ascending

Descending

Default Value

Select the value(s) to be selected when the report is first loaded.

-- Omit --

-- Omit --

The display options for dates are the same as those for dimensions and metrics, with the exception of Period Traversal.

Option	Description
Description	Define the title of the filter.
Display Filter in Legend	Show or hide this filter from the filter legend list.
Filter Requirement	There are two available options: Allow Omit: allow the user to leave this filter blank. Mandatory: force the user to provide a value for this filter in order to run the report.
Display Dependent On	Select a filter for this filter to be dependent on. This will mean that the selected filter will have to have a value selected before the dependent filter displays. Note: this option will only be displayed if you have another filter that had cached values. See Cached Dependent Filters for more information.
Remember User Selection	Remember values applied to this filter for future use.

Period Traversal	Allows you to provide the user with a method of stepping through periods before and after that selected in the filter. For example, the user filters the report on Year = 2009. If the interval is 1 Year and the interval bounds are 5 Back and 5 Forward then the user will initially see data for 2009. Each time they either move back or forward it will be 1 year, and they will be restricted to 5 years in either direction.
Option	Description
Value Entry Method	Define the way the user should provide values for the filter. There are two available options: • Manual User Entry: allows the user to either type in dates into the entry fields, or use the calendar picker. • Value List Selection: allows you to cache values or provide a list of pre-defined date ranges for the user to select from.
Allow Prompt	This option is only available for the Manual User Entry option and allows users to prompt the database for a list of values to select from at the time of viewing the report.
Value List Setup	Define which method of providing a list of values you will use. There are three options: • Pre-defined Periods: Use a list of pre-defined date ranges for the user to select from. See Date Filter Periods for more information. • Cached Values: Create a list of values by caching the current contents of the field in the database. • Cached values on demand: Create a list of values by loading the contents of the field each time the report is loaded. • Custom Query: Create a list of values by caching the current contents of the field in the database using a custom SQL query. • Custom query cached on demand: Create a list of values by caching the current contents of the field using the custom SQL query each time the report is loaded.
List Display Type	Choose if cached values should be displayed in a dropdown or a popup.
Pre-filter by Aggregated Metrics	This setting filters the cached values with the result of any filtered metric fields in the report, provided the metric field filter is not user prompted. For example, you can use this setting to further filter the unique values of this field to be cached, by adding an age (metric) field with a defined filter of greater than 50. The values cached for this dimension field will only include unique content where the age field is > 50.
Sort	Define the sort order for the list of values as ascending or descending.
Default Value	(Optional). Define the default value(s) to be used for the filter when the report is initially loaded.

If the Value List Setup option is set to **Custom Query** or **Custom Query Cached on Demand**, then the following options will become available. Use this to write a custom SQL query.

Data Source:
Default

Your query should return a single column containing the options to be displayed for this filter.

Test Query

Dimensions

When using a dimension as a filter you will have dimension specific options available in the Display and Entry Style filter menus. These options will allow you to define various settings, such as filter caching, custom descriptions and list length (if using an In List operator). These options may differ from the ones available when using a metric or a date.

Filters

General Settings

Filter Display & Actions

Filters

Invoiced Date

Agency Region

Sum Invoiced Amount

Filter Formatting

Display

Entry style

Value Entry Method

The user will select values for the filter from a pre-defined list.

Manual User Entry

Value List Selection

Value List Setup

Create a list of values by caching the current contents of the field in the database.

Cached Values

Cached Values On Demand

Custom Query

Custom Query Cached On Demand

List Display Type

Define how the user will select values for this filter.

List

Checkboxes

Popup

Pre-filter by Aggregated Metrics

Cache the filter values, including any aggregated metric filters that may be applied to the report. This will ensure the HAVING clause is applied during the caching process.

4 values cached.

Refresh Now

Sort

Sort the list of values in ascending order.

Ascending

Descending

Default Value

Select the value(s) to be selected when the report is first loaded.

Asia

Australia

Europe

North America

Option	Description
Description	Define the title of the filter.
Display Filter in Legend	Show or hide this filter from the filter legend list.
Filter Requirement	There are two available options: Allow Omit: allow the user to leave this filter blank. Mandatory: force the user to provide a value for this filter in order to run the report.
Display Dependent On	Select a filter for this filter to be dependent on. This will mean that the selected filter will have to have a value selected before the dependent filter displays. Note: this option will only be displayed if you have another filter that had cached values. See Cached Dependent Filters for more information.
Remember User Selection	Remember values applied to this filter for future use.
Display Style	When a filter has a reference code applied to it additional display options become available: Text: display the descriptive text assigned to each reference code value. Image & Text: display the text and image assigned to each reference code value. Colour & Text: display the text and colour assigned to each reference code value.
List Size	Define the number of values displayed in the list before scrolling is required.
Option	Description
Value Entry Method	Define the way the user should provide values for the filter. There are two available options: Manual User Entry: allows the user to type in values the entry fields. Value List Selection: provides a list of pre-defined dimension values for the user to select from.
Allow Prompt	This option is only available for the Manual User Entry option and allows users to prompt the database for a list of values to select from at the time of viewing the report. Note: it is recommended that the user prompt option be disabled if your data set has too many variables, as it may take some time for the values to be returned.

CSV Entry	This option is only available for the Manual User Entry option and allows users to enter values for the filter with the use of a .csv file.
Value List Setup	Define which method of providing a list of values you will use. There are three options: • Reference Codes: create a list of values for the user to select from based on the Org Ref Code applied to the filter. See Reference Code Use for more information. • Cached Values: create a list of values by caching the current contents of the field in the database. • Cached values on demand: Create a list of values by loading the contents of the field each time the report is loaded. • Custom Query: create a list of values by caching the current contents of the field in the database using a custom SQL query. • Custom query cached on demand: Create a list of values by caching the current contents of the field using the custom SQL query each time the report is loaded.
List Display Type	Choose if cached values should be displayed in a list, checkboxes, or a popup.
Pre-filter by Aggregated Metrics	This setting filters the cached values with the result of any filtered metric fields in the report, provided the metric field filter is not user prompted. For example, you can use this setting to further filter the unique values of this field to be cached, by adding an age (metric) field with a defined filter of greater than 50. The values cached for this dimension field will only include unique content where the age field is > 50.
Sort	Define the sort order for the list of values as ascending or descending.
Default Value	Define the default value(s) to be used for the filter when the report is initially loaded. (Optional).

If the Value List Setup option is set to **Custom Query** or the following options will become available.

Data Source:
Default

Your query should return a single column containing the options to be displayed for this filter.

Test Query

Metrics

Metric filters options only permit you to change the formatting options and set default values. There is no prompt option for metrics.

Filters
General Settings
Filter Display & Actions
Filters
Invoiced Date
Agency Region
Sum Invoiced Amount

Filter Formatting

Display
Entry style
Value Entry Method
Manual User Entry
Slider
Value List Setup
Manual
Custom Query
Min
1
Max
100
Default Value
1

Option	Description
Description	Define the title of the filter.
Display Filter in Legend	Show or hide this filter from the filter legend list.
Filter Requirement	There are two available options: • Allow Omit: allow the user to leave this filter blank. • Mandatory: force the user to provide a value for this filter in order to run the report.
Display Dependent On	Select a filter for this filter to be dependent on. This will mean that the selected filter will have to have a value selected before the dependent filter displays. Note: this option will only be displayed if you have another filter that had cached values. See Cached Dependent Filters for more information.
Remember User Selection	Remember values applied to this filter for future use.
Option	Description
Value Entry Method	Define the way the user should provide values for the filter. There are two available options: • Manual User Entry: allows the user to type in the metric values. • Slider: allow the user to select values using a numeric slider. • Range: the user will provide a low and high value.
Value List Setup	Define which method of providing a list of values you will use. There are two options: • Manual: the user will manually type values for this filter. • Custom Query: create a list of values by caching the current contents of the field in the database using a custom SQL query.
Min	Define the minimum value the user can select for this filter.
Interval	Define the increments the value increases by.
Max	Define the maximum value the user can select for this value.
Colour	Select the colour for the entry style.
Default Value	(Optional.) Define the default value(s) to be used for the filter when the report is initially loaded.

If the Value List Setup option is set to **Custom Query** the following options will become available.

Data Source:
Default

Your query must return a single row with two columns, containing the minimum and maximum values.

Test Query

