Filter Groups

Overview

This allows the user to define sets of filters and cached dependency hierarchies. These are designed to prevent repetition in the creation of common filter groups, and allow for a single cached value set, rather than values stored per report.

Setup

1. Add the Filter Group calculated field into a category in the Available Fields panel
   a. While the Filter Group panel is open, provide a new Business Name for your Filter Group that will allow Report Writers to easily identify the group for use.
2. Add the Fields Required as Filters to your Group by Dragging them directly below the Filter Group field. Be sure to arrange the fields in a logical top-down order, so that any dependencies display in an easy to follow manner.
3. You should format your filters as you go:
   a. Provide a new Business Name and Description if necessary
   b. Navigate to the Filter Properties tab, defining the Operator and Value Entry options for the filter
   c. Set up any dependency options that may be required if using Cached Values

   > See *Cached Dependent Filters* for more information

   d. Save your filter
4. If you have any filters that will be using Cached Values you should open the Filter Group field and navigate to the Cache Scheduling tab and define a refresh schedule to be used for your group
5. Activate your Filter Group field so that it is ready for use