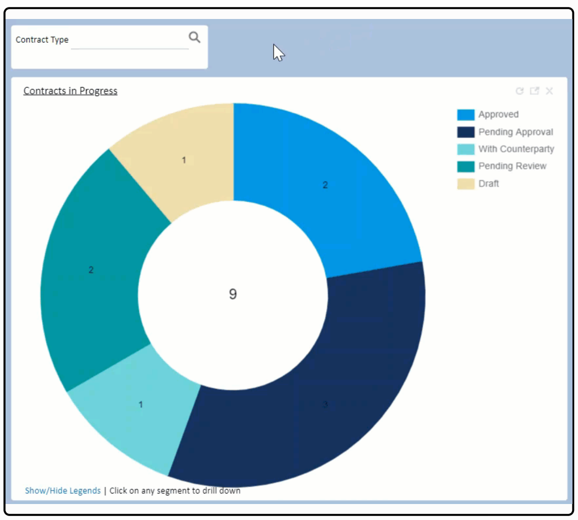
Dashboard Filters

Filters can be added as a widget on the Dashboard, which allow you to refine the data shown in each widget using search criteria. Each filter type works by defining a set of fields to filter the widget, along with additional search criteria. The filter setup allows you to choose all relevant fields in the current widget selection for the filter type. For example, a Time-based filter has access to all time fields in the available widgets, such as End Date, Start Date, and Hire Date.

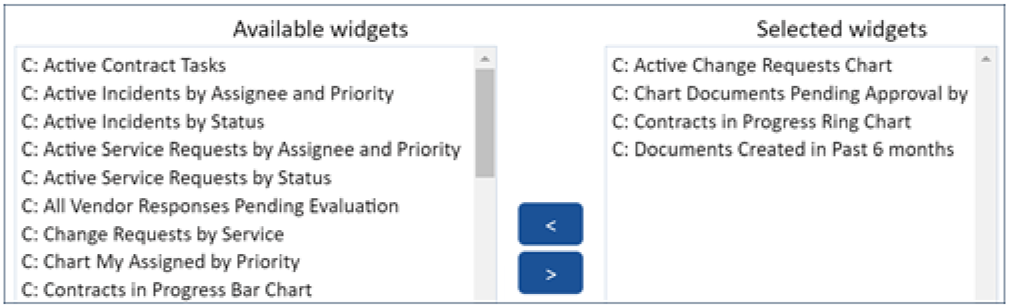
Creating Dashboard Filters

Filters are created on the Filters tab of the Dashboard wizard. When a filter is applied to the dashboard, it removes all records that do not have the value in one of the fields specified in the filter, for all widgets that use the filter fields.

> **Example**
>
> This dashboard has a filter for Contract Type, which limits the data in the widgets to only records that match the selected type. Clicking into the Chart widget opens a table view with the filter applied.
>
> 
>
>
> Dashboard filters

Each widget has its own setting to control whether filters are applied to its data. To review or adjust the Apply Dashboard Filters setting, edit the widget and go to the Options tab. With this setting enabled, when you select a filter value, the widget refreshes and applies the filter to the data already displayed in the dashboard, much like refining the results of a search.

The fields available for selection in each filter are based on the tables used in the widgets that are currently in the layout. If you do not see a widget field in the filter list, make sure that the widget is included in the Selected widgets list.



Selected widgets list

Filter Types

The following filter types are supported:

Time

Time filters operate on time-related fields in the tables used in the widgets on the layout. For example, you could create a Time filter that uses the Date Created field to find records that were created this week, this month, or this year.

To create a Time filter:

1. From the Dashboard wizard, go to the Filters tab and click New.
2. Name the filter and select the Time Based filter type.
3. Select the filter field in each source table.
4. For the filter options, select the time values that the filter can use, such as This Week, This Month, and so on. These values will appear in the widget as a drop-down list.
5. Choose the order of the time values in the drop-down list.
6. Select whether to use custom or default look and feel styles.
7. Click Finish.
8. In the Dashboard wizard, go to the Layout tab and add the filter to the dashboard.

User

User filters operate on Person-related fields in the tables used in the widgets on the layout. The filter uses a lookup to the People table, where you select a record that filters the widget fields based on the value contained in the source field.

> **Example**
>
> A User filter might use the Full Name field in the People table as its source field. And for each widget, the filter might use the Created By fields in the Change Requests and Support Cases tables. You could then use the lookup on the filter to select a record from the People table, and the filter would find records in which the value in the Full Name field matches the value in the Created By fields for each widget. If you had added a saved search to find only records where the full name is yours, you could filter the records you see on the People table to include only your own user record.

To create a User filter:

1. From the Dashboard wizard, go to the Filters tab and click New.
2. Name the filter and select the User Based filter type.
3. Select the source field in the People table.
4. For each table, choose the fields you want to filter in the widgets.
5. Select a view to display when the user uses the lookup on the filter.
6. Optionally, select a saved search to filter the records in the People table.
7. Select whether to use custom or default look and feel styles.
8. Click Finish.
9. In the Dashboard wizard, go to the Layout tab and add the filter to the dashboard.

Team

Team filters operate on Team-related fields in the tables used in the widgets on the layout. The filter uses a lookup to the Teams table and operates on the Team Name field.

> **Example**
>
> A Team filter might use the Assigned Team fields in the Tasks and Service Requests tables for each widget. You could then use the lookup on the filter to select a record from the Teams table, finding only records assigned to the Support team, or any other team, for each widget.

To create a Team filter:

1. From the Dashboard wizard, go to the Filters tab and click New.
2. Name the filter and select the Team Based filter type.
3. For each table, choose the fields you want to filter in the widgets.
4. Select a view to display when the user clicks the look-up icon in the filter.
5. Optionally, select a saved search to filter the records in the Teams table.
6. Select whether to use custom or default look and feel styles.
7. Click Finish.
8. In the Dashboard wizard, go to the Layout tab and add the filter to the dashboard.

Linked Source Field

Linked Source Field filters use linked fields from a source table used in one of the widgets on the dashboard layout, which are used to filter the related values in the widget fields. The filter uses a lookup on the linked source table, where you select a record containing the linked source field.

> **Example**
>
> A Linked Source Field filter might use the Projects table as the linked source table and the Project Name field as the linked source field, which are linked to from the Tasks table. For each widget, the filter might use the Project Name linked field in the Tasks table. You could then use the lookup on the filter to select a record from the Projects table, and the filter would find records in which the linked Project Name source field in the Projects table matches the linked Project Name field in the Tasks table.

To create a Linked Field filter:

1. From the Dashboard wizard, go to the Filters tab and click New.
2. Name the filter and select the Linked Source Field filter type.
3. Select a source table that contains linked fields from the widgets on the dashboard layout.
4. Select a source field from the source table for the filter to use.
5. For each table, choose the fields to filter in the widgets.
6. Select a view to display when the user uses the look-up icon in the filter.
7. Optionally, select a saved search to filter the records in the linked source table.
8. Select whether to use custom or default look and feel styles.
9. Click Finish.
10. In the Dashboard wizard, go to the Layout tab and add the filter to the dashboard.

Filter Appearance

Each filter can use the default style or a custom one. The styles affect the area outside of the selection look-up or drop-down list.