Filtering Data in Web Intelligence Reports

Three levels of filtering data with WEBI

**Query Filters:**

- Query filters are applied when the WEBI report is created by defining them the data source for the WEBI report. These filters are used to ensure that the data presented in WEBI is uniform and only contains data that is relevant to the topic of the report.
- Query filters are not visible to the business user nor can they be modified by them. The report definition including any filters that have been applied in the query will be disclosed in the report description document.
- Query filters are applied to the report before data is fetched from its data source

**Prompts:**

- Prompts are defined when the WEBI report is created and are part of the data source definition.
- Prompts can be defined as either mandatory or optional and are used to enforce the security policy and to limit the initial data that is retrieved and stored within the webi report data structure.
- Prompts are applied before data is fetched from its data source
- Business users can use available prompts to reduce the amount of data that is stored within the webi report data structure.

**Report Filters:**

- Report filters can be defined during report creation or by the business user as needed.
- Report filters are applied after the data is fetched from the data source and effectively hide data.
- Filters hide data that is visible in reports, charts, tables and graphs but the data is still available within the webi report structure. Once a report filter is removed no addition data refreshes are needed.
The filter bar allows for the addition of multiple single value report filters on a report.

1. Click on **Filter Bar**. This adds another sub menu at the bottom of the basic menu bar.
2. Click on the key icon on the new filter bar to add a filter.
3. Click on **Other** to see the list of available data elements.

4. Click on the **data element** you’d like to filter on (we are using **Job** in this example)

5. The **Job data element** is now added to the filter bar as an item that can be used for filtering. Additional data elements can be added by repeating the same sequence.
6. Use the drop down box and select the data values you would like to filter on to apply the filter.

7. Once the filter has been applied the rows of data not contained in the filter are hidden from view.
8. Filters can only be applied to data that is contained within the webi report structure. Ensure that the data element is displayed in the report layout before adding it to the filter bar, otherwise the filter will be empty and no values can be selected. A filter can be removed from the bar by clicking on the drop down and clicking remove.
Filters in Design Mode

Filter from menu in design mode

Filters in design mode are more flexible and powerful.

Filter from Context menu

Filter on a selected column can be created from the context menu as you see in the picture below.
Input Controls

- Input controls provide a convenient, easily-accessible method for filtering and analyzing report data.
- When you select values in the input control, you filter the values in the associated report elements by the values you selected.
- You can use input controls to analyze different scenarios by changing the value of variables.
- Input controls are report-specific.
- They are grouped on the Input Controls tab on the Side Panel.
- You can use input controls on hierarchical data. E.g., Org Unit.
You can add an input control in the Analysis tab, select the Filters sub-tab, and then from the Input Controls dropdown list, select Define Control. Alternatively, choose New from Input Controls side panel.

Select a characteristic dimension or a measure on which the filtering will be done and choose Next. Only the report elements selected in the report will be available for the selection.
In the next screen, Control Types available for selection are:

- Simple Selection – Entry Field, Combo Box, Radio Button and List Box
- Multiple Selection Controls – Check Box, List Box

When a key figure measure is selected for selection control, the control types available for selection are:

- Simple Selection – Spinner, Single slider
- Multiple Selection Controls – Double slider

Input controls can be associated with the report elements such as page or section headers, body or footers.
Click on Finish after leaving the default selection untouched.

Input controls are report-specific. They are grouped on the Input Controls tab on the Side Panel. You can open the side panel Input control to view, in case the side panel is closed or you are in some other panel.

Selection of one or more values in the input control selection and pressing ok will result in applying the filter criteria to the result in the report.

You can also have multiple input controls within a report.