Add Filters to a Report

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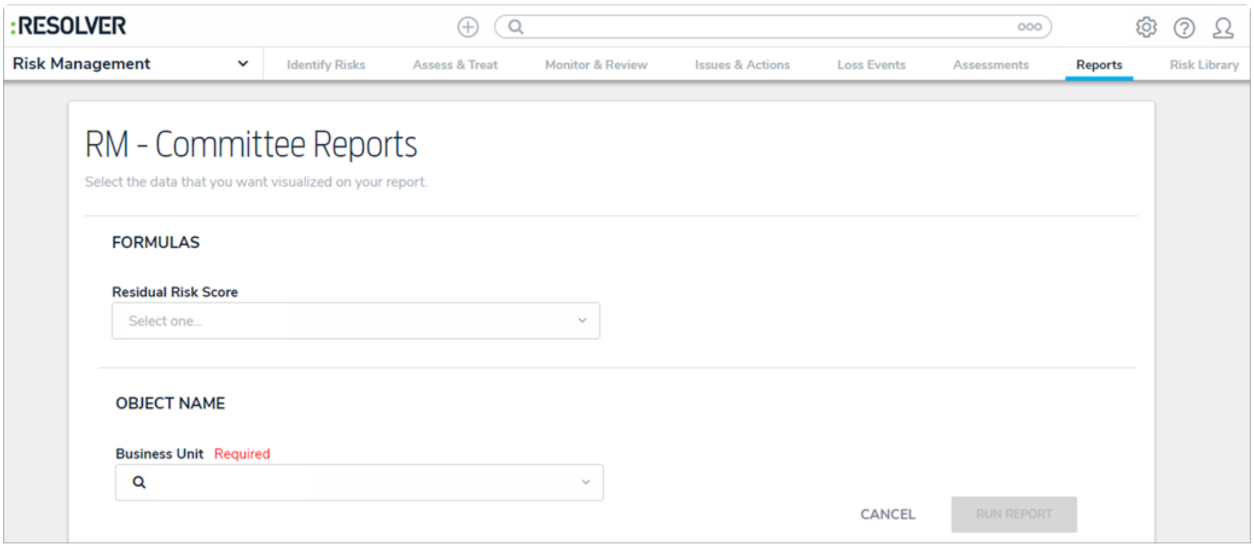
A data visualization **filter** is an optional feature that allows end-users viewing a report to narrow down which data is displayed by applying one or more filters selected by an administrator. The filter options an administrator can make available to end-users are determined by the object types selected in the report's data definition(s). If an admin marks a filter as **Required**, users must select a value for that filter on the **Filters** page before loading the report, otherwise, users have the option to apply filters after the report has loaded. For more information, see the View a Report article.

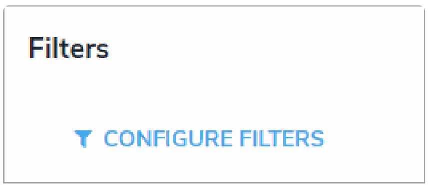
> The **Filters** feature is not available on data grids.



A required filter on the Filters screen.

To add filters to a report:

1. In the **Filters** section, click **Configure Filters**.



The Filters section.

2. From the **Configure Filters** palette, select one or more of the following filter options:
    - **State**: Filters the report data by the objects' current workflow state.
    - **Role**: Filters report data by users or user groups in explicit roles that have been granted direct access to objects from the report's data definition.

    > A report element's data series determines if the **Roles** filter can be applied. In other words, if the role hasn't been added to the object types in the data series selected for a table, chart, heat map, or repeatable form, that role filter cannot be selected.

    - **Date & Time:** Filters the report data using date ranges from a Date & Time field. If it's configured to collect the time and date, it's filtered based on the current user's time zone. See the Time Zones on Reports article for more information.
    - **Select List:** Filters the report data by select list fields.
    - **Formula:** Filters the report data by formula label. Note: If you are displaying a formula on a table, the formula(s) won't auto-calculate based on non-formula filters.
    - **Relationship:** Displays report data from a selected relationship object type and any related reference object type. For example, selecting the Risk 1 object type as a filter will also display all the Control objects that Risk 1 appears on through a relationship.
    - **Object Type:** Displays report data from a selected object type.
3. **Optional:** Click the icon beside **Enable Filtering by Report Date** to allow users to view historical data based on a selected date. See the Point in Time Reporting article for more details.
4. **Optional**: Select the **Required** checkbox beside a filter. If the **Required** checkbox is selected for any filter, users must select a value for that filter before loading the report. Note that the **Report Date** (point in time reporting) filter cannot be marked as required.

A required filter.

5. Click the icon when finished.