

Adding a Chart Filter

Last Modified on 08/20/2024 1:22 pm EDT

Our new Dashboard feature is available upon request for the initial launch phase. Please contact your Customer Success Manager if you'd like to schedule implementation with our Services team.

Overview

The Filters feature allows users to add internal Filters to the Chart's data values. These Filters are part of the Chart and will be retained in all instances of the Chart across the entire application. Furthermore, they are not visible outside the edit mode and can't be used for interaction.

User Account Requirements

The user account you use to log into Resolver must have Administrator permission to use the Dashboard Builder.

Related Information/Setup

To add styles to your Chart, please see the link below:

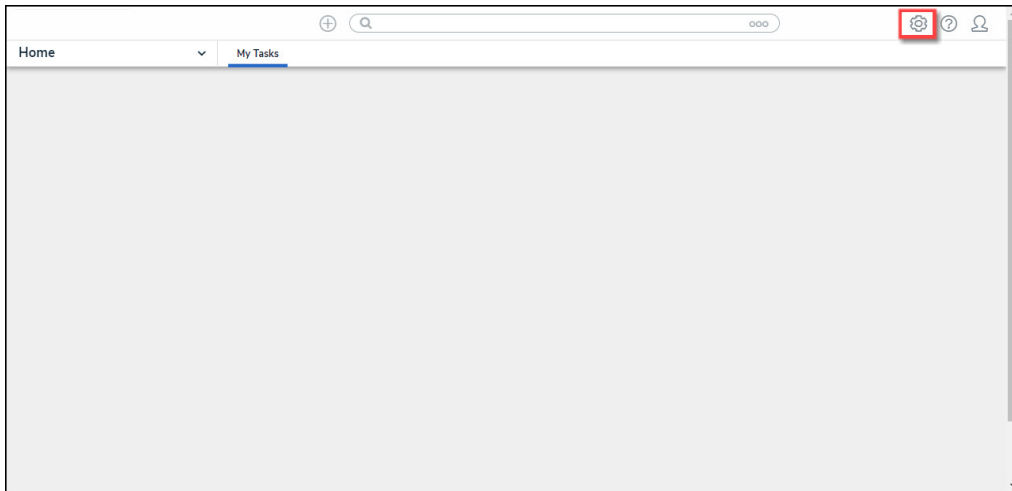
- [Adding Styles to a Chart](#)

Please see the corresponding articles below for Information on Adding a Chart Type not covered by these instructions.

- [Adding a Chart to a Dashboard](#)
- [Adding a Multi-Series Chart to a Dashboard](#)
- [Adding a Combo Chart to a Dashboard](#)
- [Adding a Table to a Dashboard](#)
- [Adding a Crosstab to a Dashboard](#)
- [Adding a Heatmap to a Dashboard](#)
- [Adding a Map to a Dashboard](#)
- [Adding a Box and Whiskers Chart to a Dashboard](#)

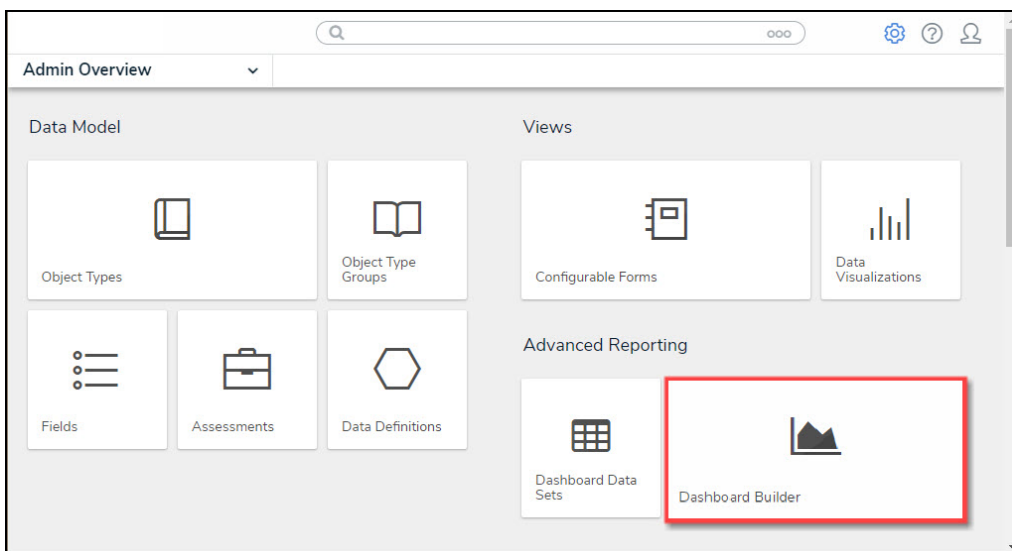
Navigation

1. From the **Home** screen, click the **System** icon.



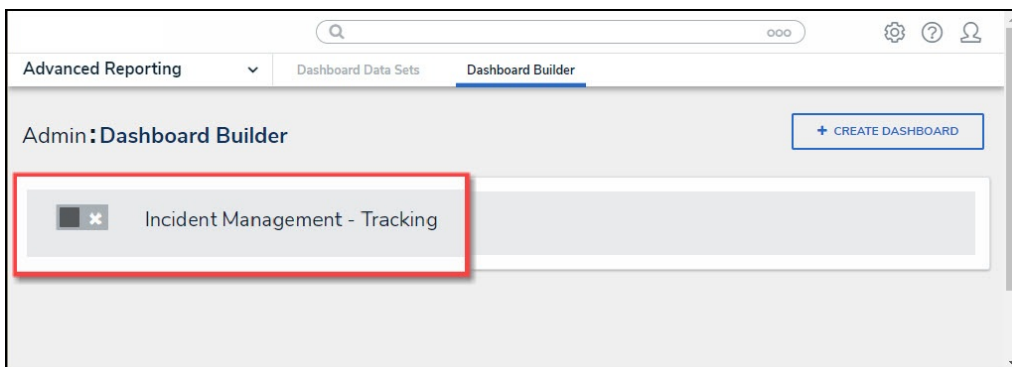
System Icon

2. From the **Admin Overview** screen, click the **Dashboard Builder** tile under the **Advanced Reporting** section.



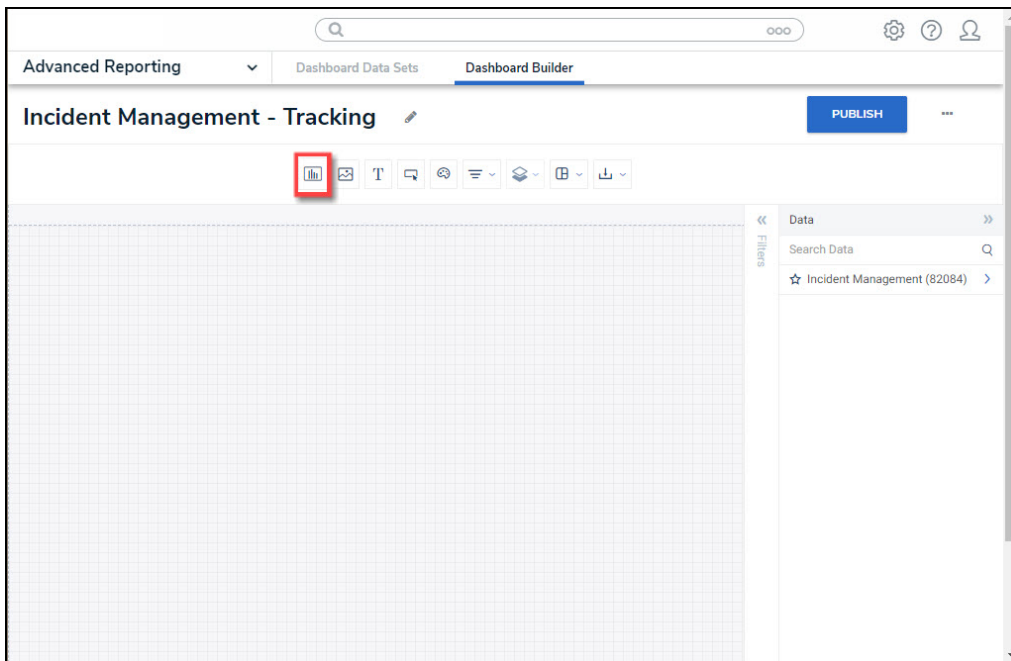
Dashboard Data Sets Tile

3. From the **Dashboard Builder** screen, click a **Dashboard Name**.



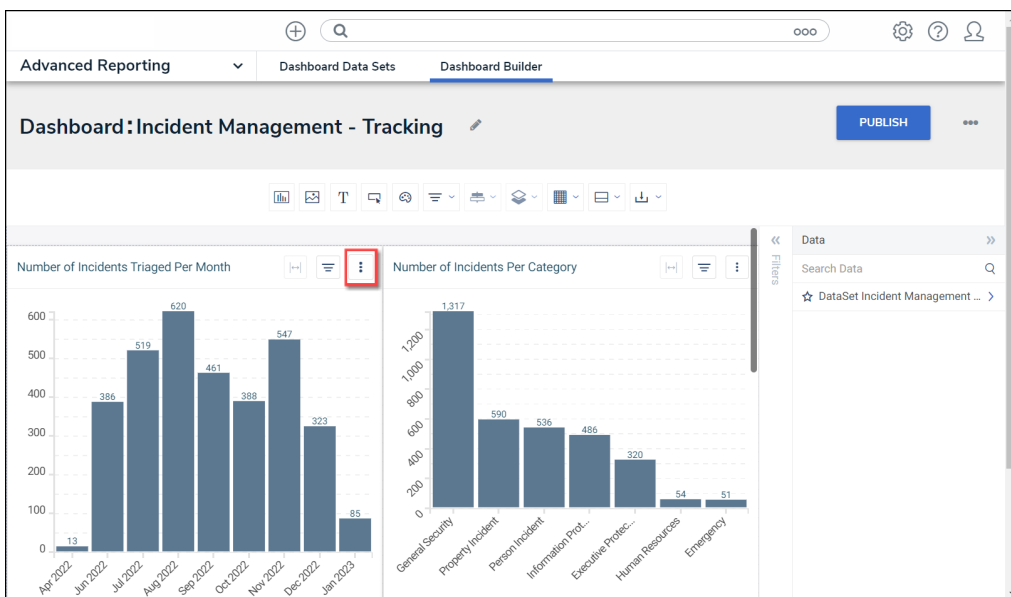
Dashboard Name

- From the **Dashboard** screen, to access the **Chart** screen, click on the **Add Chart** button.



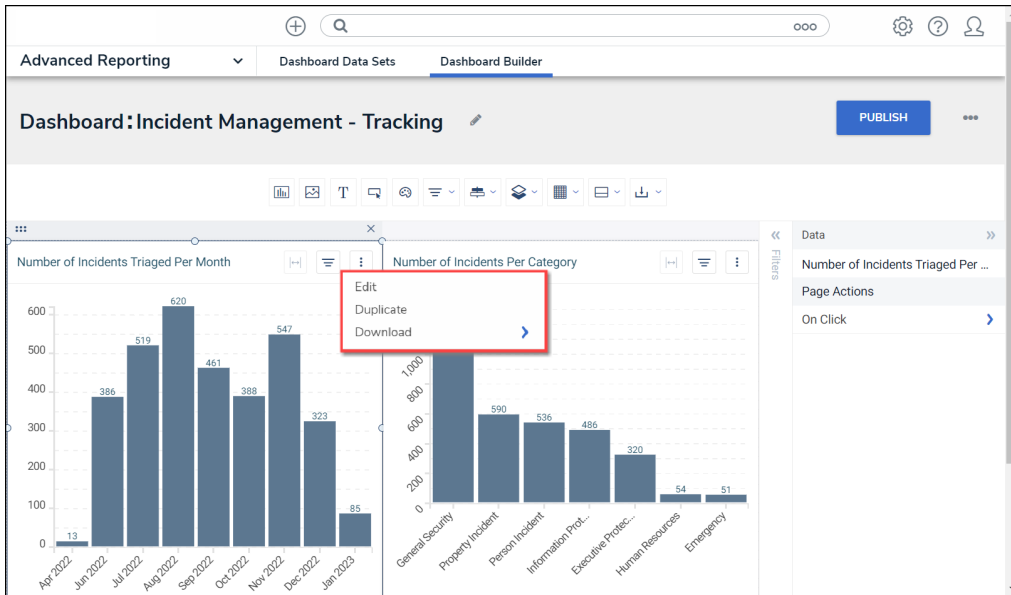
Add Chart Button

- Or click the **More Options** icon on an existing **Chart View**.



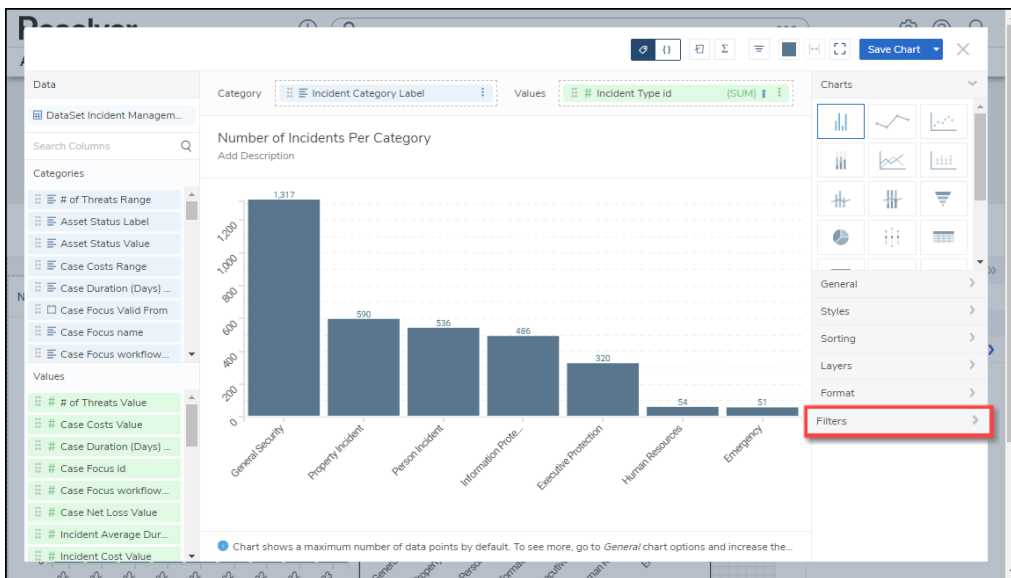
More Options Icon

- Click the **Edit** option from the **More Options** dropdown menu.



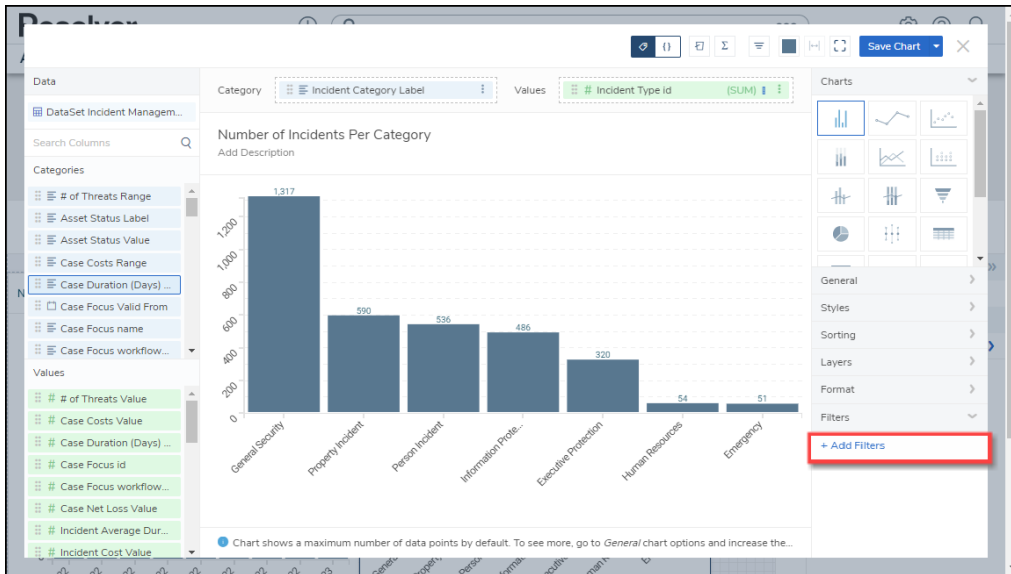
Edit Option

7. From the **Chart** screen, click the **Filters** panel from the **Configuration** panel.



Filters Panel

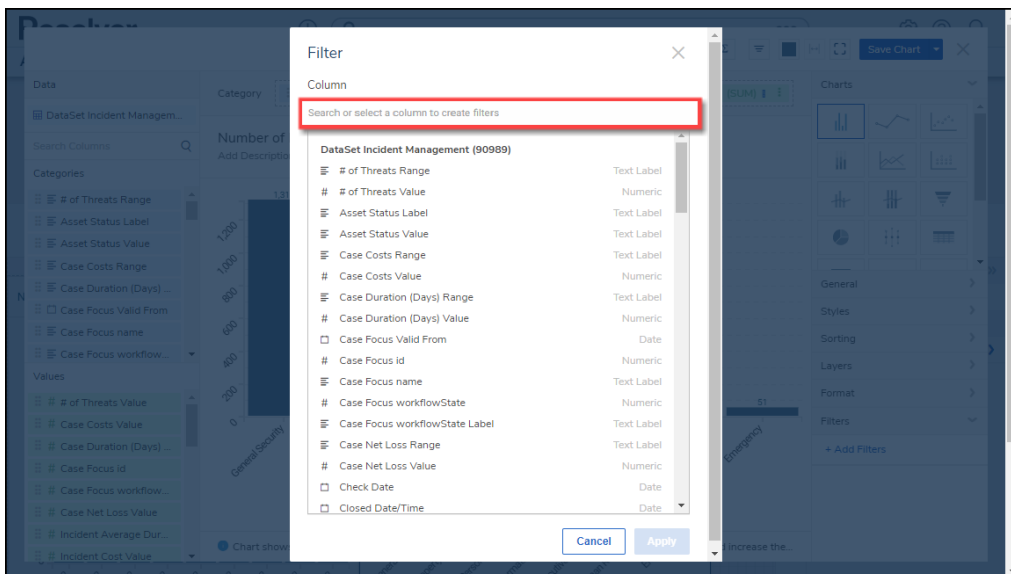
8. Click the **+Add Filters** link.



+ Add Filters Link

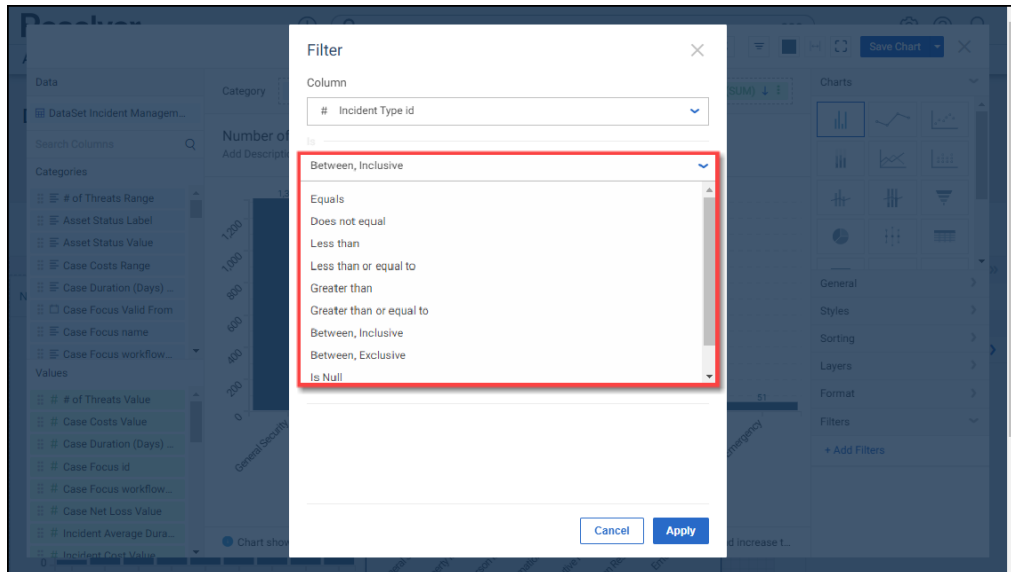
Adding a Chart Filter

1. From the **Filter** screen, enter a **Column** name in the **Column** field to narrow the search results.



Filter Screen

2. Click the **Column** you want to use to Filter the Chart.
3. Pick a **Condition** from the **Is** dropdown menu. Conditions on the **Is** dropdown menu will vary depending on if the selected Column has a Numeric, Date, or Text Label value.



Is Dropdown Menu

Numeric:

- **Equals:** The Equals Condition is met if a value(s) on the Chart equals the Value in the **Value** field.
- **Does not equal:** The Does not equal Condition is met, if a value(s) on the Chart does not equal the Value in the **Value** field.
- **Less than:** The Less than Condition is met If a value(s) on the Chart is less than the Value in the **Value** field.
- **Greater than:** The Greater than Condition is met, if a value(s) on the Chart is greater than the Value in the **Value** field.
- **Less than or equal to:** The Less than or equal to Condition is met if a value(s) on the Chart is less than or equal to the Value in the **Value** field.
- **Greater than or equal to:** The Greater than or equal to Condition is met if a value(s) on the Chart is greater than or equal to the Value in the **Value** field.
- **Between, inclusive:** The Between, inclusive Condition is met if a value(s) on the Chart is within the value range, including the edge values (e.g., 0 - 500, will include the edge values 0 and 500). An extra **Value** field is added when using Between, Inclusive, which allows users to create a value range by entering a numerical value in each **Value** field. The first **Value** field is the min value in the range.
- **Between, exclusive:** The Between, exclusive Condition is met if a value(s) on the Chart is within the value range, excluding the edge values (e.g., 0 - 500, will exclude the edge values 0 and 500). An extra **Value** field is added when using Between, Exclusive, which allows users to create a value range by entering a numerical value in each **Value** field. The first **Value** field is the min value in the range.
- **Is null:** The Is null Condition is met if a value(s) on the Chart equals null (0), the Condition is met. The **Value** field is removed and is not used when **Is Null** is selected.

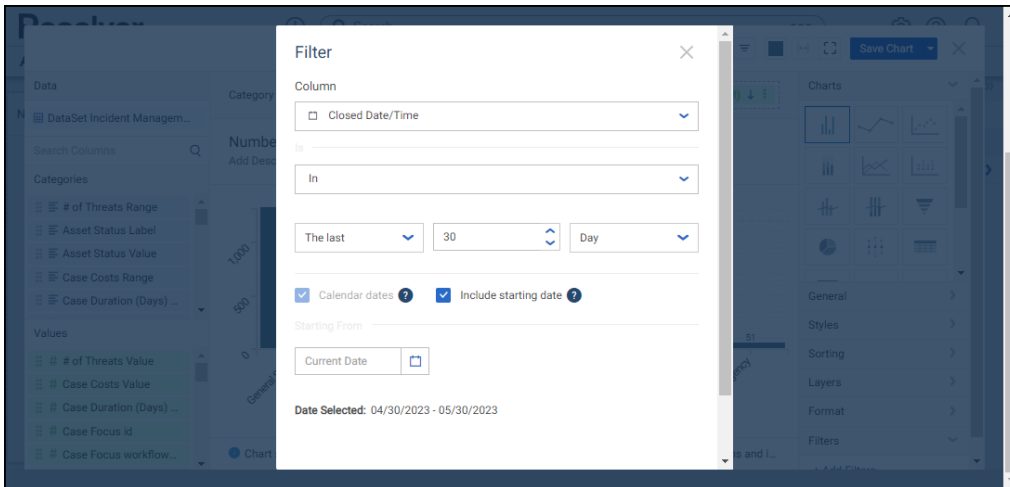
- **Is not null:** The Is not null Condition is met if a value(s) on the Chart does not equal null (0), the Condition is met. The **Value** field is removed and is not used when **Is Not Null** is selected.

Date:

- **In:** The In Condition is met if a date value(s) on the Chart is within the date Condition.
 - **Operator:** Select a date Operator from the dropdown menu.
 - **This:** Selecting the **This** operator allows users to specify the length of time, creating a Date range starting today (e.g., Day, Year, Quarter, Month, Week).
 - **Date Length:** Select the Date Length to apply to the operator from the dropdown menu (e.g., Day, Year, Quarter, Month, Week).
 - **The last:** Selecting **The last** operator allows users to create a date range based on the last specified period by specifying the amount of time within the date range (e.g., The last 30 Days).
 - **Value:** Enter the length of time in the **Value** field.
 - **Date Length:** Select the **Date Length** from the dropdown menu (e.g., Day, Year, Quarter, Month, Week). The **Calendar date** checkbox is locked if you select Days as a Date Length.
 - **The next:** Selecting **The next** operator allows users to create a date range based on the next specified period by specifying the amount of time within the date range (e.g., The next 30 Days).
 - **Value:** Enter the length of time in the **Value** field.
 - **Date Length:** Select the **Date Length** from the dropdown menu (e.g., Day, Year, Quarter, Month, Week). The **Calendar date** checkbox is locked if you select Days as a Date Length.
 - **Calendar Dates:**
 - **Enable:** Uses a calendar-based approach to calculating filter date ranges. A calendar-based approach considers the start and end date of the selected date range.
 - **Disable:** Uses a rolling date range calculation which allows the start and end date to move depending on today's date (e.g., for the last two years, if today's date is 2/8/2021, the filter range will be 2/8/2019 through 2/8/2021 today and change to 2/9/2019 to 2/9/2021 tomorrow).
 - **Include Starting Date:** Includes (enabled) or excludes (disabled) the starting date in the range.
 - **Current Date:** Enter the number of days in the **Date** field. The **Date** field determines the number of days included within the Condition range (e.g., The Last

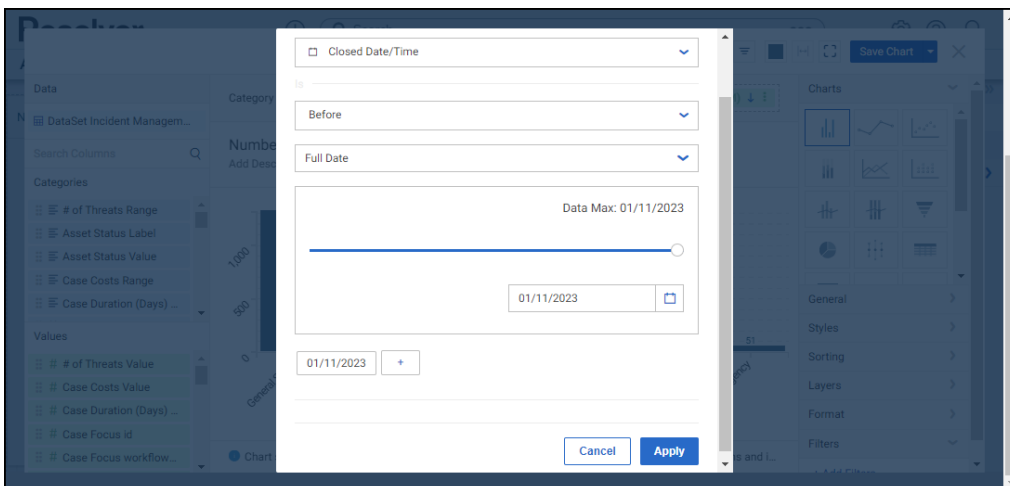
30 days, if 30 is entered in the **Date** field and **The Last** is selected from the **Operator** dropdown menu).

- **Date Selected:** This will indicate the start and end dates included in the date range.



In Date Option

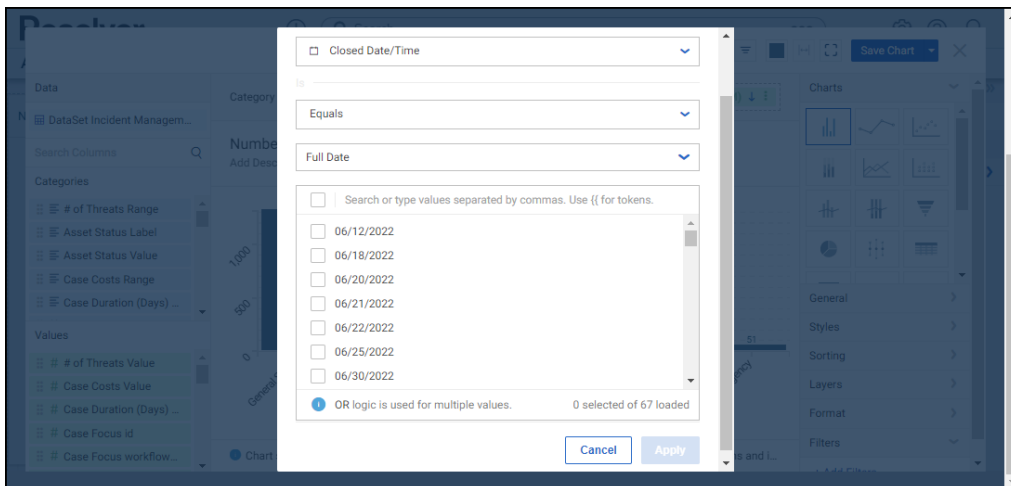
- **Before:** The Before Condition is met if a value(s) on the Chart is within the date range before the specified date (e.g., before 01/01/2023).
 - **Date Length:** Select the **Date Length** from the dropdown menu (e.g., Year, Quarter, Month, Week).
 - **Date:** Select a Date from the **Calendar** pop-up or use the slide bar to select a Date to indicate the end date of the Condition range.



Before Option

- **Before or on:** The Before or on Condition is met if a value(s) on the Chart is within the date range before or on the specified date (e.g., before or on 01/01/2023).
 - **Date Length:** Select the **Date Length** from the dropdown menu (e.g., Year, Quarter, Month, Week).

- **Date:** Select a Date from the **Calendar** pop-up or use the slide bar to select a Date to indicate the end date of the Condition range.
- **After:** The After Condition is met if a value(s) on the Chart is within the date range after the specified date (e.g., after 01/01/2023).
 - **Date Length:** Select the **Date Length** from the dropdown menu (e.g., Year, Quarter, Month, Week).
 - **Date:** Select a Date from the **Calendar** pop-up or use the slide bar to select a Date to indicate the beginning date of the Condition range.
- **After or on:** The After or on Condition is met if a value(s) on the Chart is within the date range after or on the specified date (e.g., after or on 01/01/2023).
 - **Date Length:** Select the **Date Length** from the dropdown menu (e.g., Day, Year, Quarter, Month, Week). The **Calendar date** checkbox is locked if you select Days as a Date Length.
 - **Date:** Select a Date from the **Calendar** pop-up or use the slide bar to select a Date to indicate the beginning date of the Condition range.
- **Equals:** The Equals Condition is met if a value(s) on the Chart equals the date(s) selected (e.g., equals 01/01/2023).
 - **Search or type values separated by commas:** Search the Data for comma-delimited date values (separated with commas).
 - **Dates:** Select a Date(s) from the generated date list by clicking the checkbox next to the Date. When selecting multiple dates, the OR value is used.

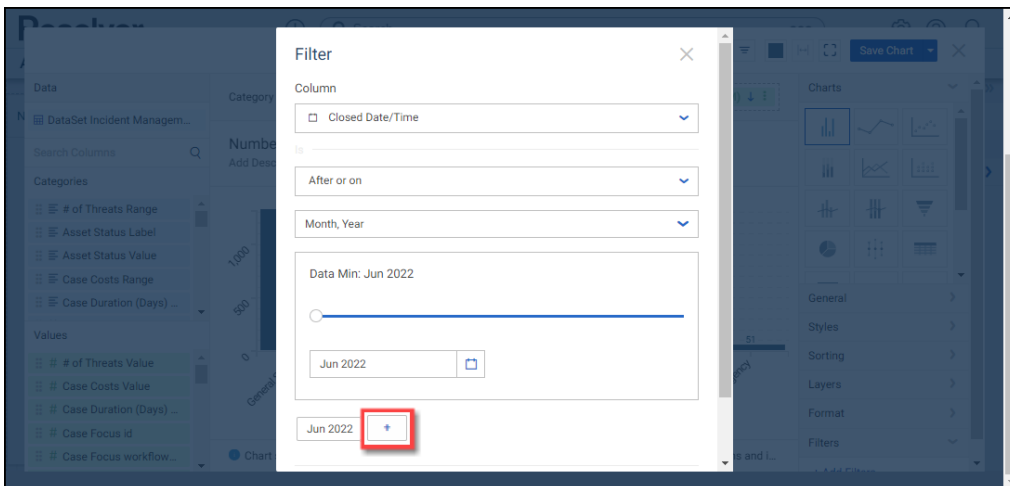


Equals Option

- **Does not equal:** The Does not equal Condition is met if a value(s) on the Chart does not equal the date(s) selected (does not equal, on 01/01/2023).
 - **Search or type values separated by commas:** Search the Data for comma-delimited date values (separated with commas).
 - **Dates:** Select a Date(s) from the generated date list by clicking the checkbox next

to the Date. When selecting multiple dates, the OR value is used.

- **Between, inclusive:** The Between, inclusive Condition is met if a value(s) on the Chart is within the value range, including the edge values, the Condition is met (e.g., 0 - 500, will include the edge values 0 and 500). An extra **Value** field is added when using Between, Inclusive, which allows users to create a value range by entering a numerical value in each **Value** field. The first **Value** field is the min value in the range.
- **Between, exclusive:** The Between, exclusive Condition is met if a value(s) on the Chart is within the value range, excluding the edge values (e.g., 0 - 500, will exclude the edge values 0 and 500). An extra **Value** field is added when using Between, Exclusive, which allows users to create a value range by entering a numerical value in each **Value** field. The first **Value** field is the min value in the range.
- **Is null:** The Is null Condition is met if a value(s) on the Chart equals null (empty). The **Value** field is removed and is not used when **Is Null** is selected.
- **Is not null:** The is not null Condition is met if a value(s) on the Chart does not equal null (empty). The **Value** field is removed and is not used when **Is Not Null** is selected.
- **Date Selected:** When using the In operator, the system will automatically set the Start Date to today's date and extend the ranges end date according to the In operator (e.g., Week, Month, etc.).
- **Add New Value:** A user can add date values by selecting the plus (+) button. The **Add New Value** button does not appear for every **Date** option.

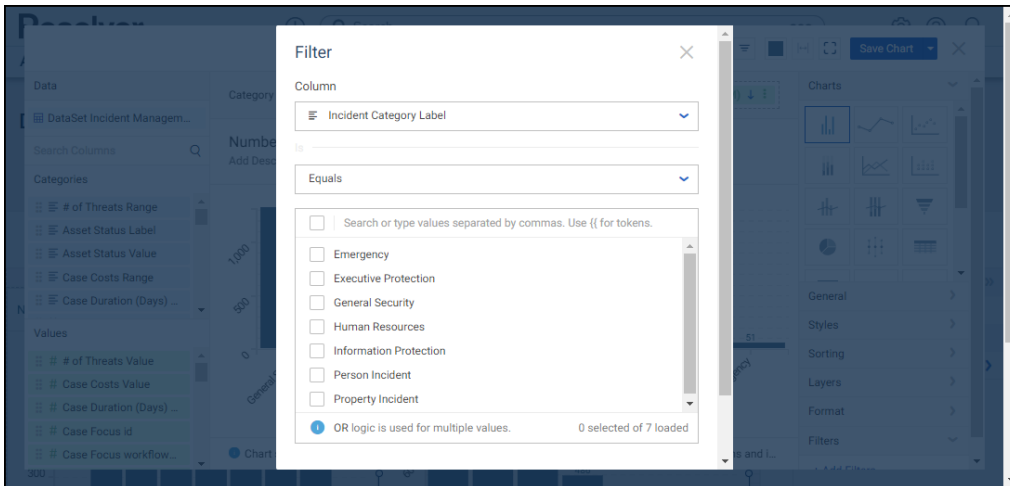


Add New Value Button

Text Label:

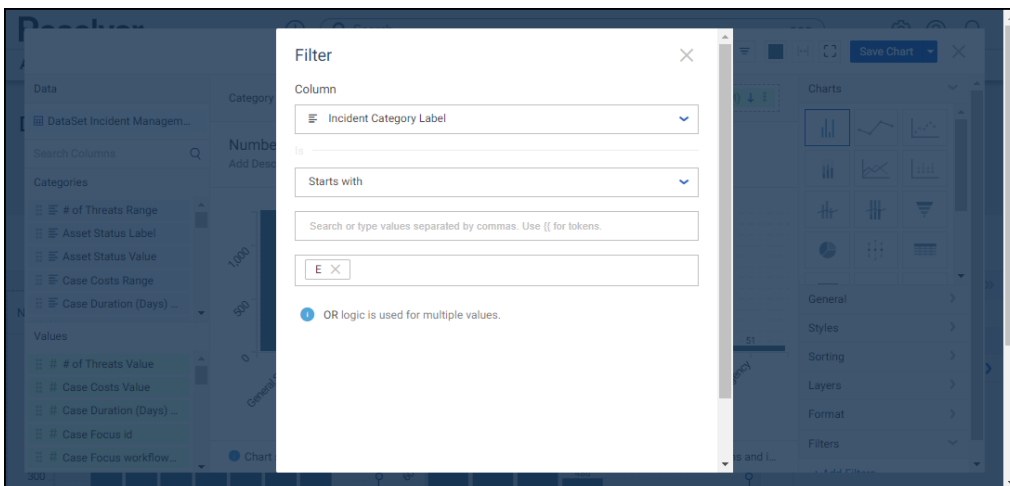
- **Equals:** The Equals Condition is met if a value(s) on the Chart equals the Text Value(s) selected (e.g., equals Person Incident).
 - **Search or type values separated by commas:** Search the Data for comma-delimited Text Values (separated with commas).
 - **Text:** Select Text Values from the generated list by clicking the checkbox next to the

Text Value. When selecting multiple Text Values, the OR value is used.



Equals Option

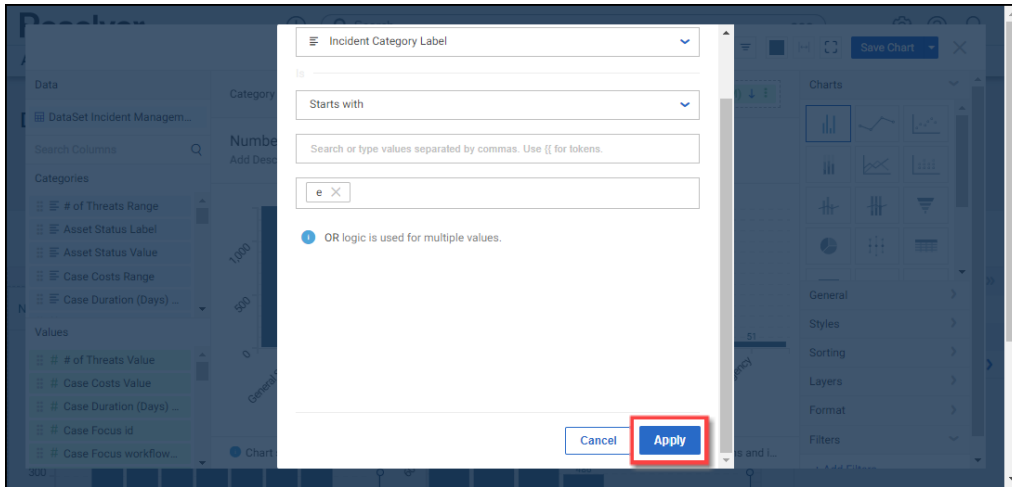
- **Does not equal:** The Does not equal Condition is met if a value(s) on the Chart does not equal the Text Value(s) selected (e.g., equals Person Incident).
 - **Search or type values separated by commas:** Search the Data for comma-delimited Text Values (separated with commas).
 - **Text:** Select Text Values from the generated list by clicking the checkbox next to the Text Value. When selecting multiple Text Values, the OR value is used.
- **Starts with:** If a value(s) on the Chart starts with the Text Value entered, the Condition is met (e.g., starts with "e" = Emergency).
 - **Text Value:** Enter the first few starting text characters in the Text Value(s) you want to include in the Chart and press **Enter** to add the text value to the **Selected Text Value** field.
 - **Selected Text Value:** The Selected Text Value field displays all the text values to include within the Chart.



Starts With Option

- **Does not start with:** The Does not start with Condition is met if a value(s) on the Chart does not start with the Text Value entered (e.g., does not start with "e" = Personal Injury, etc.).
 - **Text Value:** Enter the first few starting text characters in the Text Value(s) you do not want to include in the Chart and press **Enter** to add the text value to the **Selected Text Value** field.
 - **Selected Text Value:** The Selected Text Value field displays all the text values to excluded from the Chart.
- **Contains:** The Contains Condition is met if a value(s) on the Chart does contain the Text Value entered (e.g., contains "e" = Personal Injury, etc.).
 - **Text Value:** Enter text characters in the Text Value(s) you want to include in the Chart and press **Enter** to add the text value to the **Selected Text Value** field.
 - **Selected Text Value:** The Selected Text Value field displays all the text values to include from the Chart.
- **Does not contain:** The Does not contain Condition is met if a value(s) on the Chart does not contain the Text Value entered (e.g., does not contain "e" = Injury, etc.).
 - **Text Value:** Enter the text characters in the Text Value(s) you do not want to include in the Chart and press **Enter** to add the text value to the **Selected Text Value** field.
 - **Selected Text Value:** The Selected Text Value field displays all the text values to excluded from the Chart.
- **Ends with:** The Ends with Condition is met if a value(s) on the Chart does end with the Text Value entered (e.g., ends with "y" = Personal Injury, etc.).
 - **Text Value:** Enter the text characters in the Text Value(s) you want to include in the Chart and press **Enter** to add the text value to the **Selected Text Value** field.
 - **Selected Text Value:** The Selected Text Value field displays all the text values to include from the Chart.
- **Does not end with:** The Does not end with Condition is met if a value(s) on the Chart does not end with the Text Value entered (e.g., does not end with "e" = Personal Injury, etc.).
 - **Text Value:** Enter the first few starting text characters in the Text Value(s) you do not want to include in the Chart and press **Enter** to add the text value to the **Selected Text Value** field.
 - **Selected Text Value:** The Selected Text Value field displays all the text values to excluded from the Chart.
- **Is null:** The Is null Condition is met if a value(s) on the Chart equals null (empty). The **Value** field is removed and is not used when **Is Null** is selected.
- **Is not null:** The Is not null Condition is met if a value(s) on the Chart does not equal null (empty). The **Value** field is removed and is not used when **Is Not Null** is selected.

- When you have created your filter condition, click the **Apply** button to apply the condition to the Chart.



Apply Button