Dashboard Filters

As dashboards are created and shared, the users have the ability to filter the dashboard to visualize the data they need.

To access the filter fields, click on the left arrow located in the middle right located on the left side of the dashboard.

Available Filters

Below is a listing of the most common dashboard filters:
NOTE: *This listing does not include ALL the available options.*

- Date
- Inspection Type
- Segment
- Sub Category
- Incident Details
- Contractor
- Project Details
- Region (Hierarchy)
- Category
- Observation Details
- Inspection Details
- Work Hours
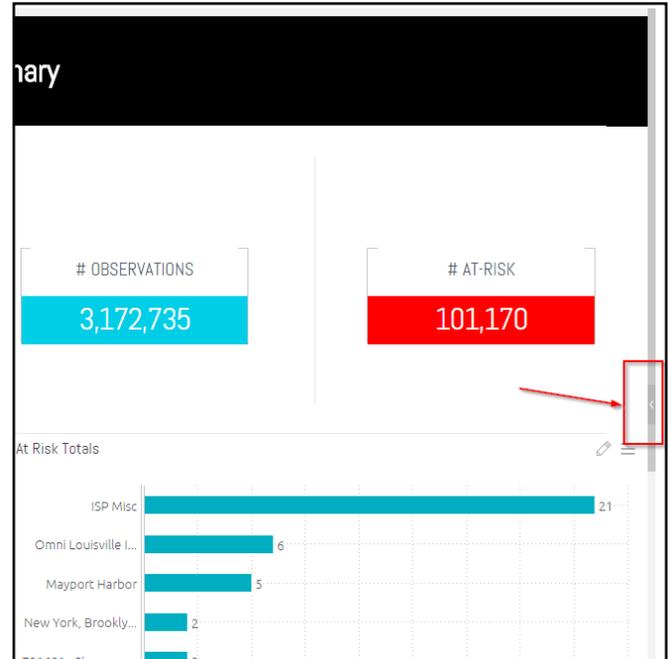
Adding Filters

To add filters to the dashboard click on the **+Add** button. You will then see a new window that allows you to select the filter you need.
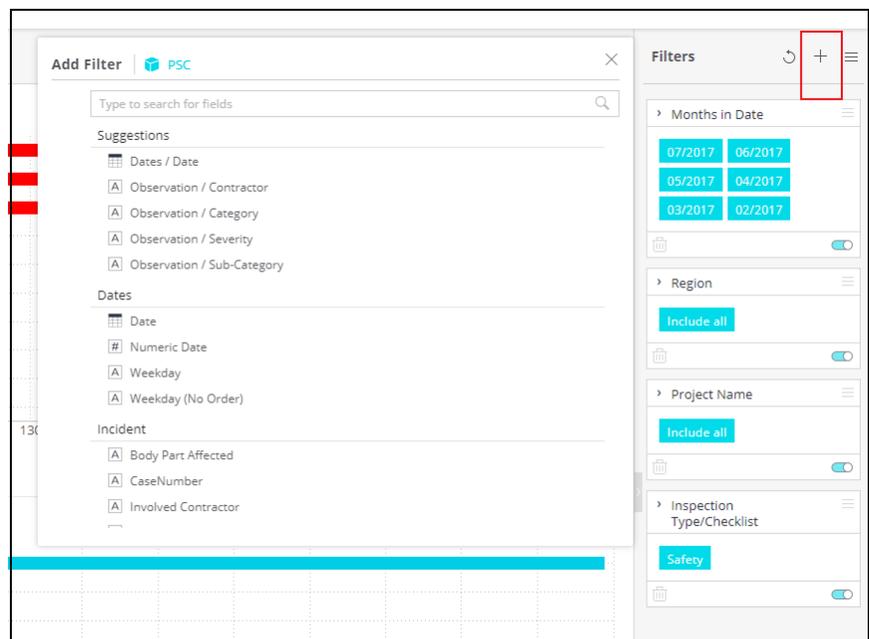
As you add filters, you will see a toggle at the bottom of the filter window. This tells the system to automatically update the dashboard. This feature is defaulted to ON.

	Prepared/Responsible Grace Herrera	Document No.- PSC-17:005	Rev. - C	Page 1 of 3

Adding Filters Continued

You can search the filters by using your mouse to scroll up and down OR you can type in the filter name.

Filtering by project/location hierarchy (region), as shown in the corresponding screenshots, is a good example.

Once you select the filter type the system will provide a listing of available options for that filter. You may use your mouse to search using the scroll bar OR you can type in the "name/label" of your value and select it by clicking in the box on the left of the value. Click the "**OK**" button to apply the filter to your dashboard.
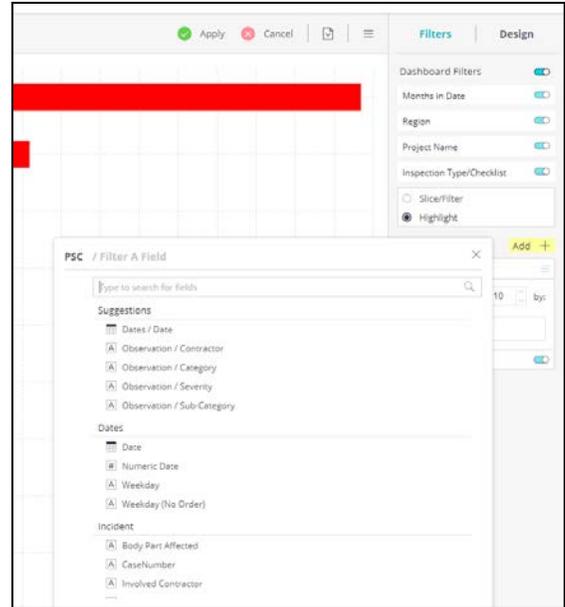
Editing Filters

Filters can be edited and/or turned "OFF" for a specific period.

Editing a filter – Hover your mouse over the filter label (Example: Months in Date). You will see a pencil icon. When you click on the pencil icon a window will appear. This window allows you to "view" your current selection as well as provide a listing of all filter options for that filer type.
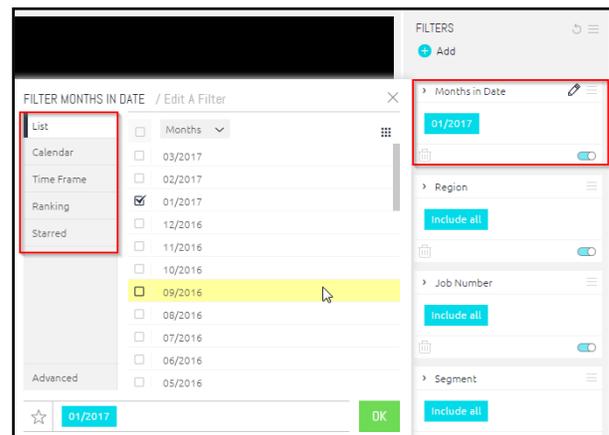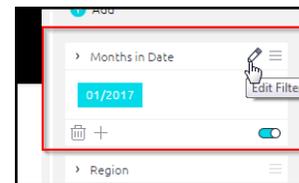
Editing Filters Continued

You can select a different filter value or you can change the type of filter value. For example, Months in Date can be updated to Quarters in Date, as illustrated in the example.

Turning a filter "OFF" – To turn a filter "OFF" use the toggle button on the lower left hand of the individual filter box. This option allows you to temporarily "remove" a filter from a dashboard without deleting it completely.

TIP: When the data doesn't look right, make sure you check the filters.
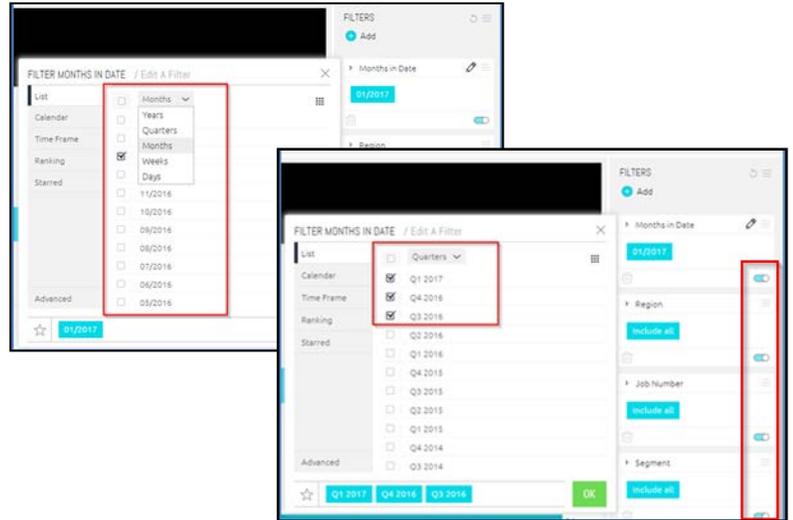
Setting Default Filters

Once you have added all the filters to the dashboard you have the ability to set default filters. Setting default settings will save the filters to the current dashboard. It does NOT save for all dashboards.

Click on the stacked menu icon on the right hand side of filters section and select Set as My Default Filters.

You may add and edit filters as needed and restore your default filters by clicking on the refresh icon located next to the stacked menu icon.
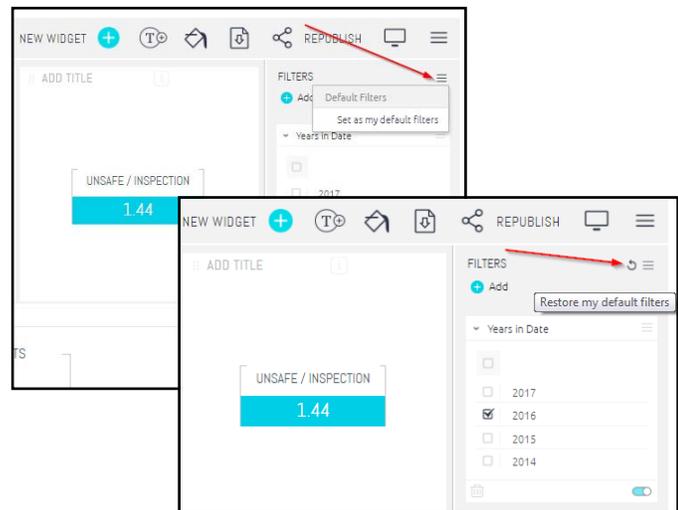
Deleting Filters

To delete a filter you simply click on the Trash Can icon. This will delete the filter permanently. If this is done in error, simply click on the +Add and follow the instructions on adding a filter.

	Prepared/Responsible Grace Herrera	Document No.- PSC-17:005	Rev. - C	Page 3 of 3