

Filter data using custom date filters

This document explains how to filter data on a dashboard using custom date filters such as: the current week, month or year, the last 7 days. We will leverage the filter tables (link) and show how to link them to a dashboard.

STEP-BY-STEP GUIDE

- Copy the two tables containing the date filters (please follow the procedure described in [this document](#)). The *FilterTable* contains the different filters with the corresponding start and end date.

DateFilters (Primary)
6 rows
2 cols

FilterTable
6 rows
4 cols

FilterTable: 1-6, 6 record(s)

term	type	StartDateTime	EndDateTime
Week	week	2021-07-04 00:00:00	2021-07-11 23:59:59
Working Week	workingweek	2021-07-04 00:00:00	2021-07-11 23:59:59
Month	month	2021-07-01 00:00:00	2021-07-11 23:59:59
Working Month	workingmonth	2021-06-01 00:00:00	2021-06-30 23:59:59
Year	year	2021-01-01 00:00:00	2021-07-11 23:59:59
Working year	workingyear	2020-01-01 00:00:00	2020-12-31 23:59:59

- Create a parameter to store the user's filter choice.
 - Click on *Object* -> *Variable*
 - Provide a name : in our case *Filter type*
 - Set its type as *String*
 - Select *Query* as *Selection List* and bind it to the column *type* of the *FilterTable*. This will allow to get the different filters as items of the dropdown list.

- Create a mirror of the *FilterTable* and filter it using the variable so that we only take the row where the column *type* is equal to the *Filter type* parameter.

Query6 Condition

Conditions **MV Update**

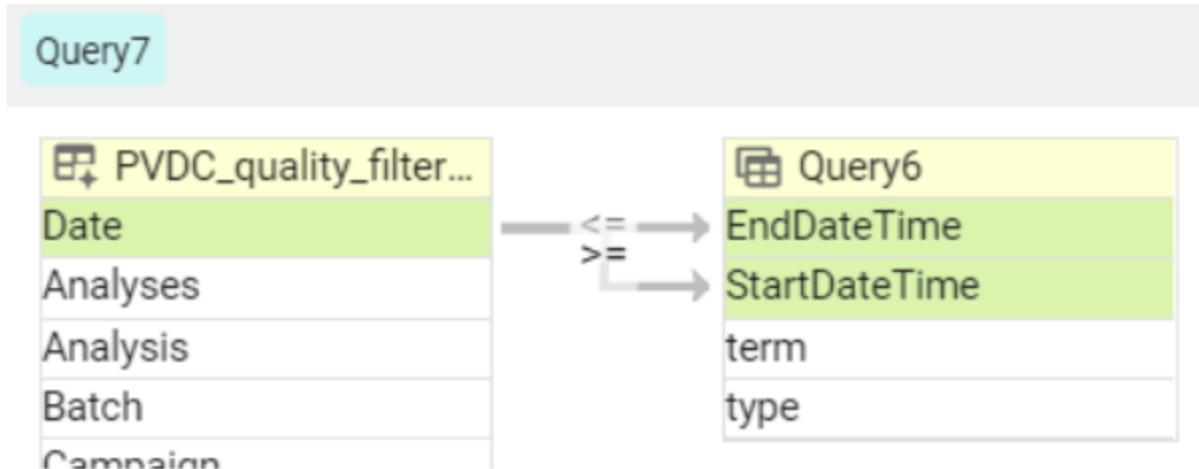
☐ Advanced Conditions

[FilterTable.type][is][equal to][\$(\$Filter type)]

meter.

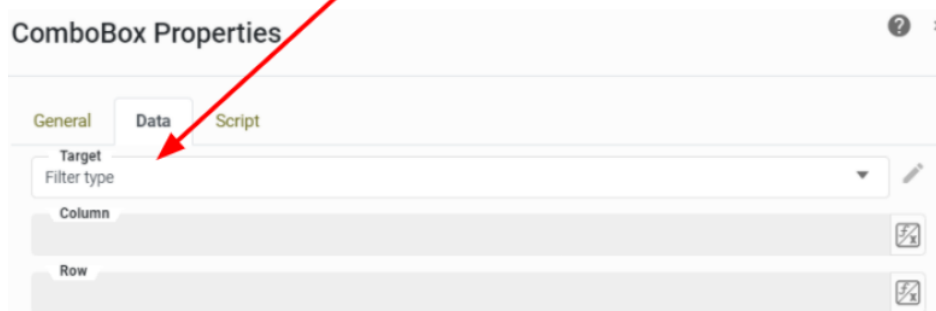
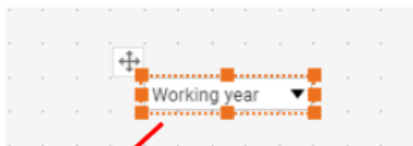
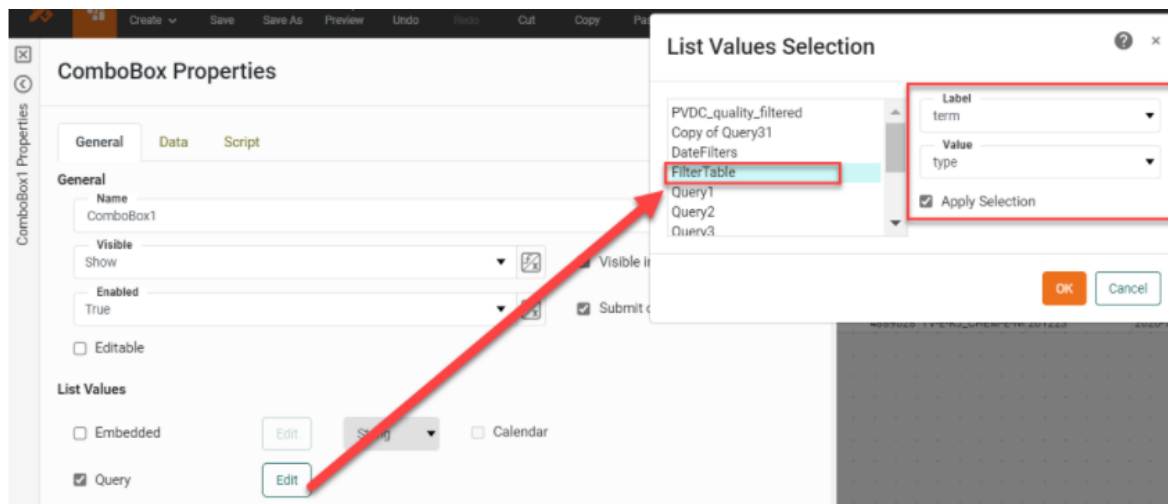
- Join this table with the one containing your data. If you have a *Date* field a possible join can be as follows

Date >= StartDateTime and Date <= EndDateTime



Create a dashboard linked to this worksheet

- Create a dashboard linked with the data worksheet you have just created
- Create a combo box to allow the user to select a custom filter
 - Select *Query* as *List Values*. Select the *FilterTable* table, set the label with the column *term* and value with the column *type*
 - In the *Data* tab set the *target* property to the variable *filter type*, this will allow to update the parameter value every time the user changes the selection and so update the queried table



- Create some charts based on the filtered table and you should see that data changes accordingly to the filter selection.

