

Apply Filters in BS

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Document Purpose 1.

The purpose of this document is to guide users on how to define and use the filter functionality in a Business Story. It is recommended that users follow the step by step process given below.

Pre-requisites 2.

- Browser that supports HTML5 0
- Operating System: Windows 7
- Basic understanding of the BizViz Server
- Permission to access and use Data Center Module
- Basic understanding of how to access, create, and modify Data Stores under the Data Center module of the BDB Platform.
- Basic understanding of the Business Story workflow.

Apply Filters: Step-by-Step Process 3.

Users can apply filter to a view or the entire business story.

3.1. View Specific Filter

- i) Click 'Filter' on the Story Designer.
 ii) A filter panel opens with the list of filter values.
- iii) Click on a filter value to display a list containing all the sub-filter values.
- iv) Select a sub-filter value by check marking the box.
- v) Click 'Apply'.

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vi) The selected filter values will be applied to the concerned view.



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Note:

- a. Users need to click '**Apply**' button while enabling or eliminating the view specific filter values to reflect the same in the view.
- b. Users can insert, modify, or remove a view specific filter via 'Analyse' option.
- c. Users can add a filter based on the 'Measures' values.
 - i) Open the Filter panel on the Design New page.
 - ii) All the selected dimensions and measures will be listed.
 - iii) Select a measure as a filter value.
 - iv) Select a condition from the drop-down menu.
 - v) Click 'Apply'.
 - vi) The selected filter value will be applied to the view.



3.2. Global Filter

- i) Click 'Global Filter'
- on the Story Board.
- ii) A filter panel opens with the list of filter values.
- iii) Click on a filter value to display a list containing all the sub-filter values.

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- Use a check mark in the check box to select a sub-filter value. iv) V)
 - Click 'Apply'.

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vi) The global filter will be applied to all the concerned views on a Storyboard.

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Note:

- Global filter can be applied only to those views on the story board where the filter values are used a. as dimensions.
- b. Global filter when applied to various views on a story board, subdues the view specific filter values.
- c. Users can insert views created via different data stores on one Story Board. By default, the Global filter panel will display all the obtainable filter values across the data stores.
- d. Users can filter data based on the 'Measures' values.
 - Click the 'Global Filter' icon **Y** i)
 - The Filter panel will be opened on the Story Board. ii)
 - iii) Select a measure as a filter value.
 - iv) Select a condition from the drop-down menu.
 - v) Click 'Apply'.



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vi) The selected filter value will be applied to the view.

Signing Out 4.

The following steps describe how to sign out from the BizViz Platform:

- Click the '**User**' icon **P** on the Platform home page. A menu appears with the logged in user details. i)
- ii)
- iii) Click 'Sign Out'
- iv) Users will be successfully logged out from the BizViz Platform.

Note: By Clicking the 'Sign Out' option users will be redirected to the 'Login' page of the BizViz platform.