



How to Guide

Apply Filters in BS

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1. Document Purpose

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.


2. Pre-requisites

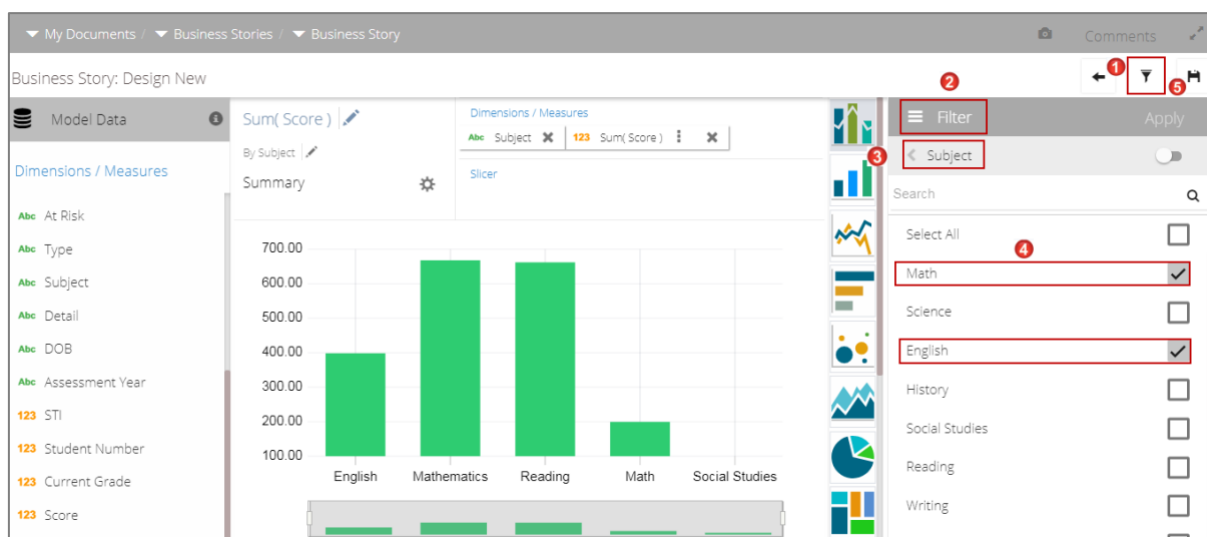
- Browser that supports HTML5
- Operating System: Windows 7
- Basic understanding of the BizViz Server
- Permission to access and use Data Center Module
- Basic understanding of how to access, create, and modify Data Stores under the Data Center module of the BDB Platform.
- Basic understanding of the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

3. Apply Filters: Step-by-Step Process

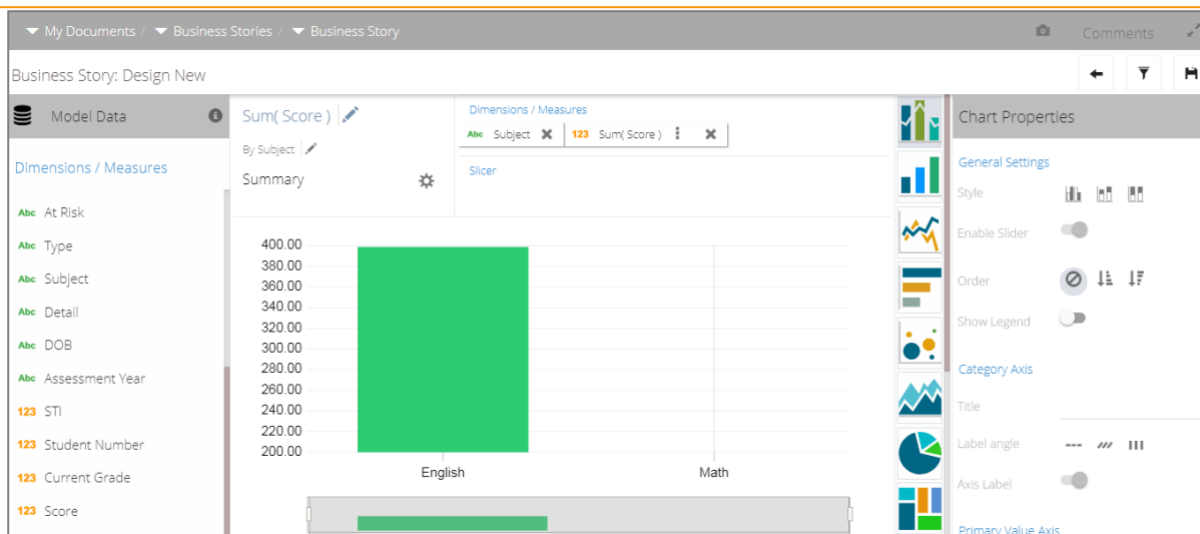
Users can apply filter to a view or the entire business story.

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'.

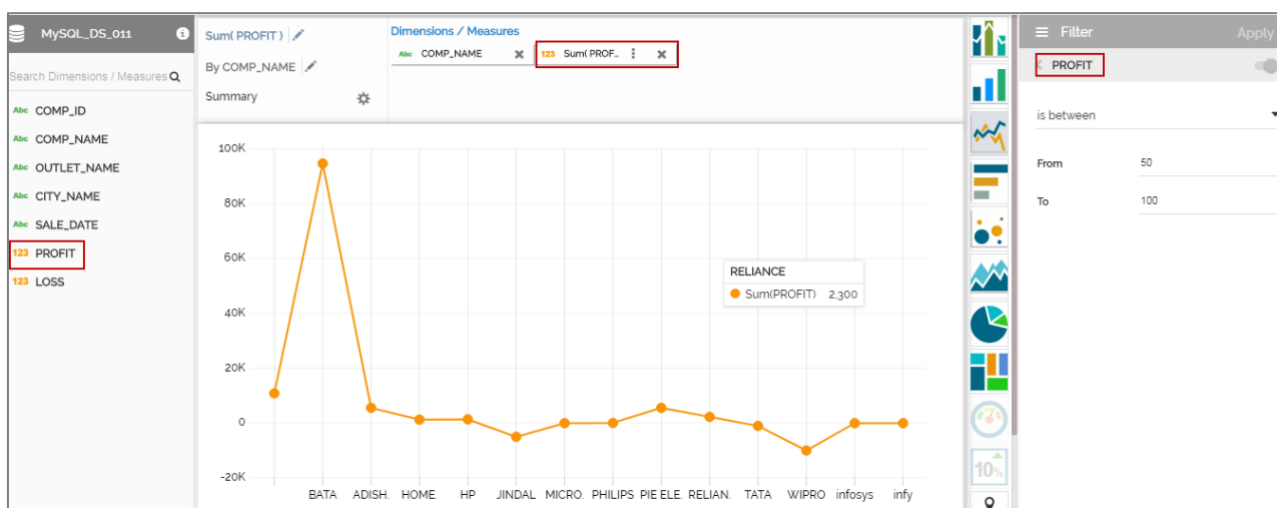


- vi) The selected filter values will be applied to the concerned view.




Note:

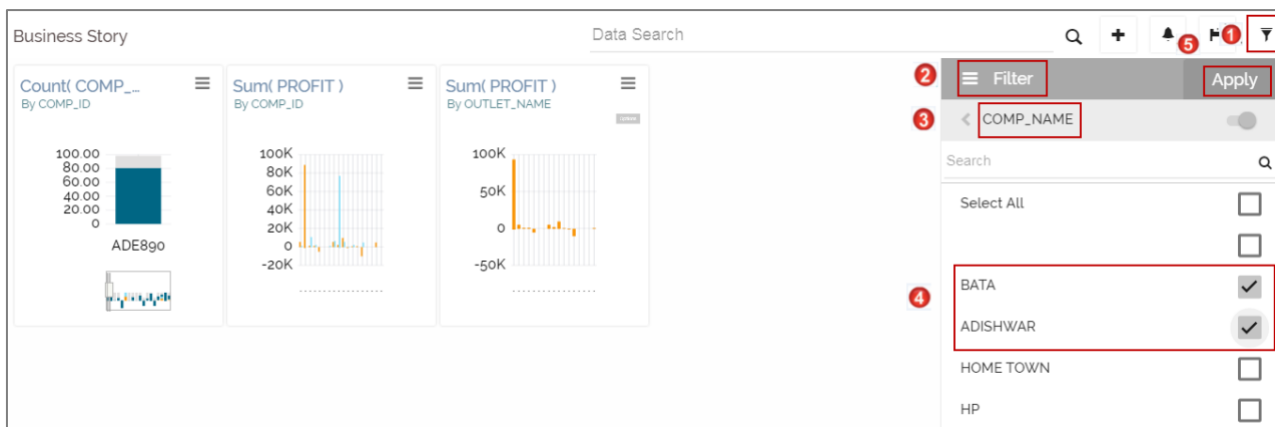
- a. Users need to click ‘Apply’ button while enabling or eliminating the view specific filter values to reflect the same in the view.
- b. Users can insert, modify, or remove a view specific filter via ‘Analyse’ option.
- c. Users can add a filter based on the ‘Measures’ values.
 - i) Open the Filter 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.



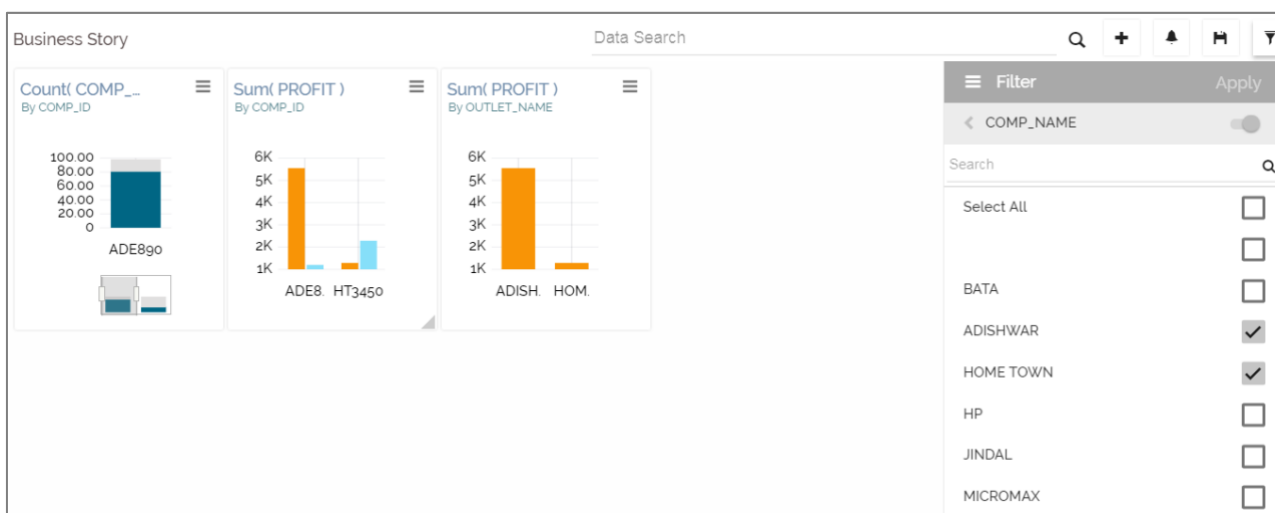
3.2. Global Filter

- 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.

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

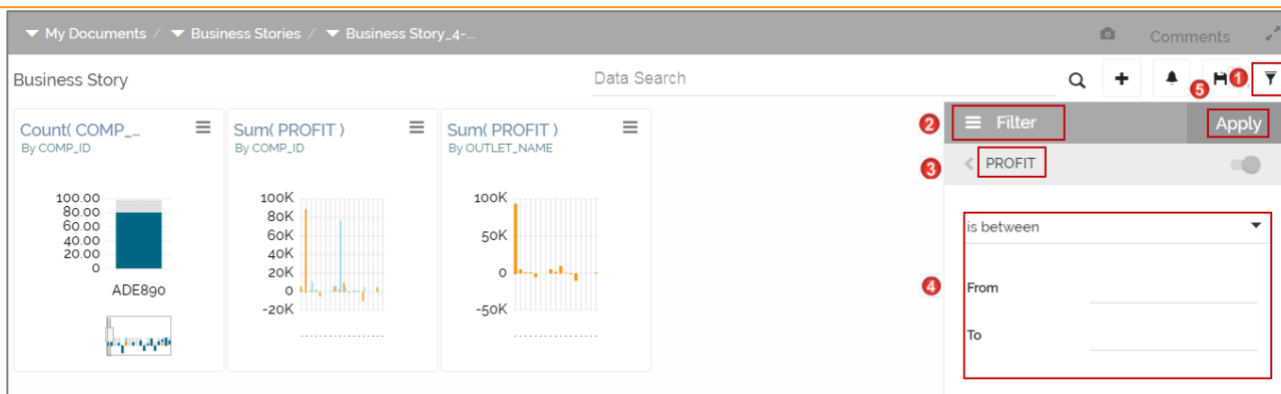


- vi) The global filter will be applied to all the concerned views on a Storyboard.



Note:


- a. Global filter can be applied only to those views on the story board where the filter values are used 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.
 - i) Click the 'Global Filter' icon
 - ii) The Filter panel will be opened on the Story Board.
 - 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.

4. Signing Out

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

- i) Click the 'User' icon  on the Platform home page.
- ii) A menu appears with the logged in user details.
- 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.