



Filter Sets

Help Documentation

Filter Sets

Site administrators as well as general users can use filter sets to view only the data they want to see in reports. Filter sets are created with a combination of website directories or single pages to limit the report data, allowing users to quickly flip between subsets of data when viewing reports.

For example, suppose your company sells furniture. In the reports you want to view the data associated with all bedroom furniture, except for a specific product ID for a nightstand that is being discontinued. The URL for the bedroom furniture page of the website might be `/furniture/bedroom.aspx`. To narrow down the reports to only bedroom furniture you would enter this directory in the Included Items field. Then, to exclude the discontinued nightstand, enter `/furniture/bedroom/nightstands/elegant_collection/detail.aspx?prodid=3` into the Excluded Items field.

To access this section, click the Settings icon. Then expand the My Settings folder and click Filter Sets in the navigation pane. A list of the existing filter sets will load in the content pane if any have already been created.

Adding a Filter Set

To create a new filter set, click New in the content pane toolbar. The following options will be available:

- Filter Name - The name of the filter set.
- Included Items (one per line) - Type the items you want added to the filter, one per line. Any text field in reports that contain any item in this list will be kept in the report and its values will remain in the summary line. Note: Filters are NOT case sensitive.
- Excluded Items (one per line) - Type the items you want excluded from the filter, one per line. Any text field in reports that contain any item in this list will be excluded from the report and its values will be removed from the summary line. Note: Filters are NOT case sensitive.
- Mark as default filter set - Check this box to automatically apply this filter set to reports upon loading. Note: If left unchecked, you will need to manually apply the filter to each report and click Generate Report to view the report with the selected filter.