



## Filter Data in Reports

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- [Overview, on page 1](#)
- [Types of Filters, on page 1](#)
- [Configure a Date Range Filter, on page 2](#)
- [Configure a Value List or Collection Filter, on page 2](#)
- [Configure Advanced Filters, on page 3](#)

### Overview

Report filters in the Unified Intelligence Center are used to present selective data. Use the Filter page to both define and restrict the data that will populate the report.

There are two ways to view the Filter page.

- Before the report is generated—In the **Reports** section, right-click the report and click **Run**. Do this to refine the default filter values before generating the report.
- After the report is generated—In the Report Viewer, click the **Filter** button of the generated report. Do this to refine the filter values for a generated report.

### Types of Filters

For Live Data reports, the following filters are available:

- Basic Filters—You can configure the collection and value list filters.
- Advanced Filters—You can filter the data for all the fields that are available in the report based on a predefined criteria.



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**Attention**

For Historical reports, Basic Filters and Advanced Filters tabs are not available. The date range, collection and value list filter settings are available in a single window.

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## Configure a Date Range Filter

Two filters are available for date range:

- Relative date range—You can select from the predefined options.
- Absolute date range—You can set the from and to date and time.

**Note**

If you set the local time zone in the user profile, then the set time zone is considered. If you do not set the local time zone, then the Unified CCX data source time zone is considered.

**Attention**

Date range filters are not available for Live Data reports.

### Procedure

**Step 1**

If you want to set a relative date range:

- a) Click **Relative Date Range**.
- b) Choose an option from the **Relative Date Range** drop-down list.

Available options—Today, Yesterday, This Week, Last Week, This Month, Last Month, Year to Date, or Last Year.

- c) Set the From and To time.

**Step 2**

If you want to set an absolute date range:

- a) Click **Absolute Date Range**.
- b) Click the calendar icon and set the **From** and **To** dates.
- c) Set the **From** and **To** time.

## Configure a Value List or Collection Filter

Use the **Basic Filters** tab to configure the date range filter value lists or collections. A collection is a preconfigured group of values.

Figure 1: Collection Filter

### Procedure

- Step 1** Click a report to view the **Filter** page.
- Step 2** Choose the collection or values from the **Choose Collection** or **Choose Value List** field.

**Tip** Search for a value or collection using the **Search** field.

**Note** Do not set multiple filter parameters; set any one filter parameter.

The items in the collection or value list appear in the Available list.

- Step 3** Select an item from the Available list and move it to the Selected list.
- Step 4** You can repeat the search and add to the list of selected items. You can also select multiple collections or values.
- Step 5** Click **Run**.

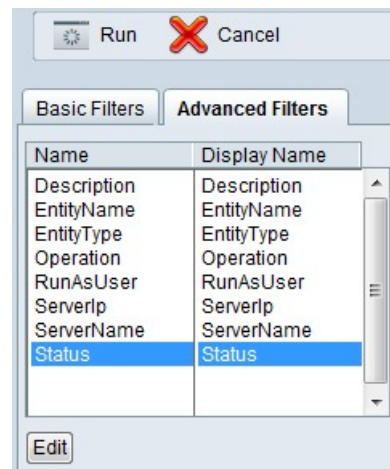
## Configure Advanced Filters

You can use the **Advanced Filters** tab to filter any field in the report. Based on the field type (date, numeric or string), different operators are available. For example, you can filter calls in queue for greater than 2 minutes or on all agents in the hold state to filter out the less important information.

**Note**

- You can use advanced filters in reports based on SQL Query only.
- Advanced filters can be used to filter a plain text or a decimal field based on field type.

Figure 2: Advanced Filters

**Procedure**

**Step 1** Generate a report and then click **Filter** to view the **Filter** page. To view the Advanced Filters, select the **Advanced Filters** tab.

**Step 2** Select a field.

**Step 3** Click **Edit** to indicate any value or a filtered value.

**Step 4** Select **Filter according to the following criteria**.

Filter criteria depend on the field type (Date, Decimal, Value List, String, or Boolean).

- For **Date**, click **Edit** to specify any value or to filter by selecting either Relative Date Range or Absolute Date Range. For both Relative and Absolute date ranges, you can indicate a specific time period and certain days of the week.
- For **Decimal**, click **Edit** to specify any value or to select an Operator from Equal To, Not Equal To, Less Than, Less Than or Equal To, or Greater Than and then entering a value; for example, Operator = Greater Than and Value = 16.5.
- For **String**, click **Edit** to specify any value or to filter by selecting an Operator from Equal To, Not Equal To, or Matches Pattern and then enter a value for the string; for example, Operator = Matches Pattern and Value = Team Green.

If you select Pattern as the Operator, you must specify an SQL pattern to match the string field. The system appends the wild card character % automatically to the beginning and end of the string. You can also use any SQL wild card pattern in between the string.

- For **Boolean**, click **Edit** to specify any value or to filter by selecting an Operator and then selecting True or False.

- If the advanced filter field is a **Value List**, click **Edit** to specify any value or to filter by moving one, all, or some items in the list to the Selected column.

**Step 5** Using the **Operator** drop-down list, select the criteria.

**Note** If you select **Matches the pattern** operator, you can use any Microsoft SQL wildcard pattern to filter the data. The wildcard character **%** is added to the beginning and end of every string that is used to filter the data.

**Step 6** In the **Value** field, enter a value against which the data in the field will be filtered.

**Step 7** Click **Run**.

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