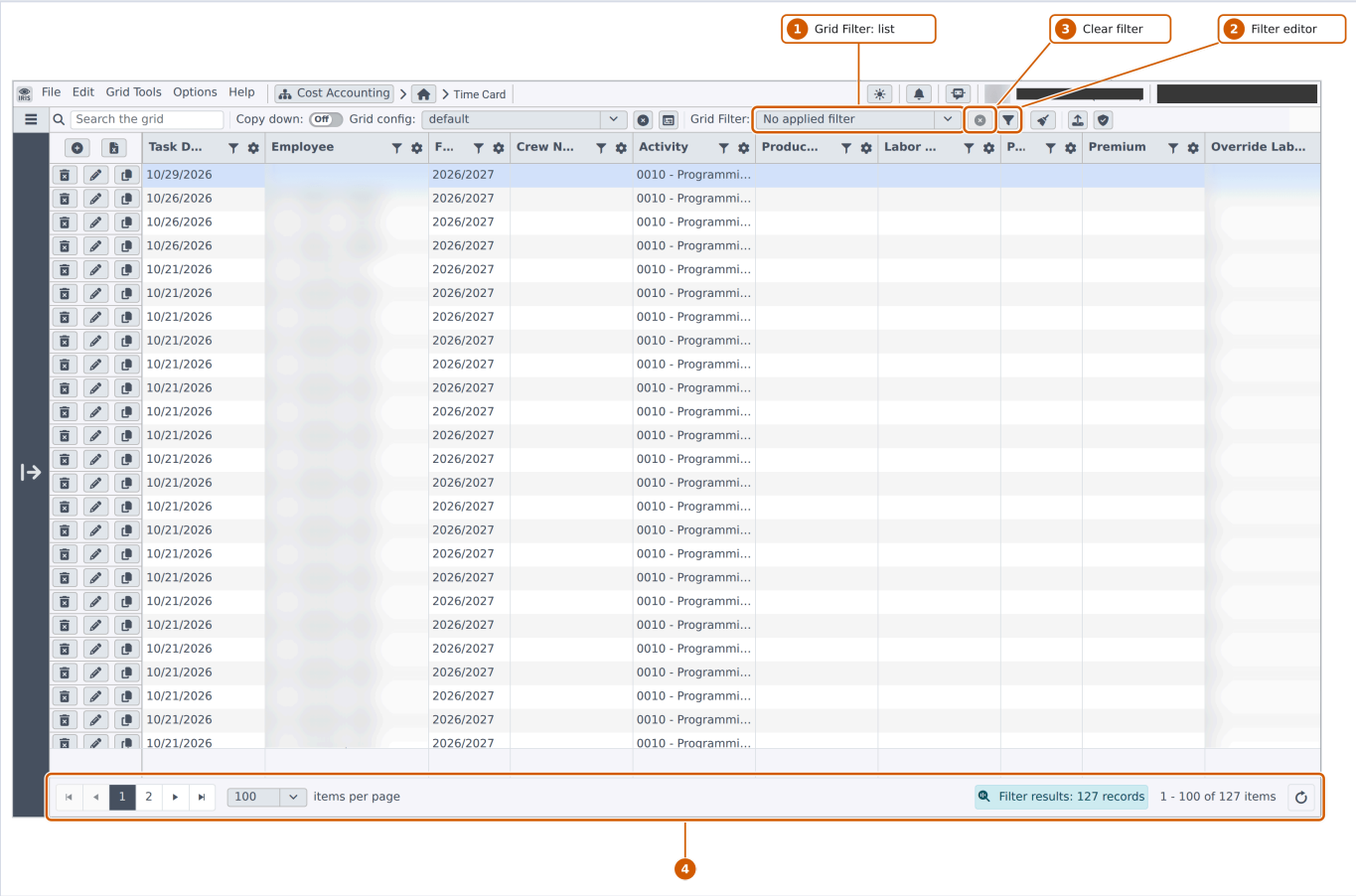
Grid filters

Overview

You can narrow a grid to the records you need in three ways:

- Choose a saved filter from the **Grid Filter** list on the grid toolbar.
- Filter on one column from its column header.
- Build a multi-condition filter in the filter editor window, check it and apply it.

The examples on this page use the Time Card grid. The grid toolbar has the **Grid Filter** list, the **Filter editor** button, and the **Clear filter** button. The pager shows **Filter results** with the number of records the current filter returned.



Filter controls on the grid toolbar and the filter result count in the pager.

1. **Grid Filter list**
2. **Filter editor**
3. **Clear filter**
4. **Filter results count**

Before you begin

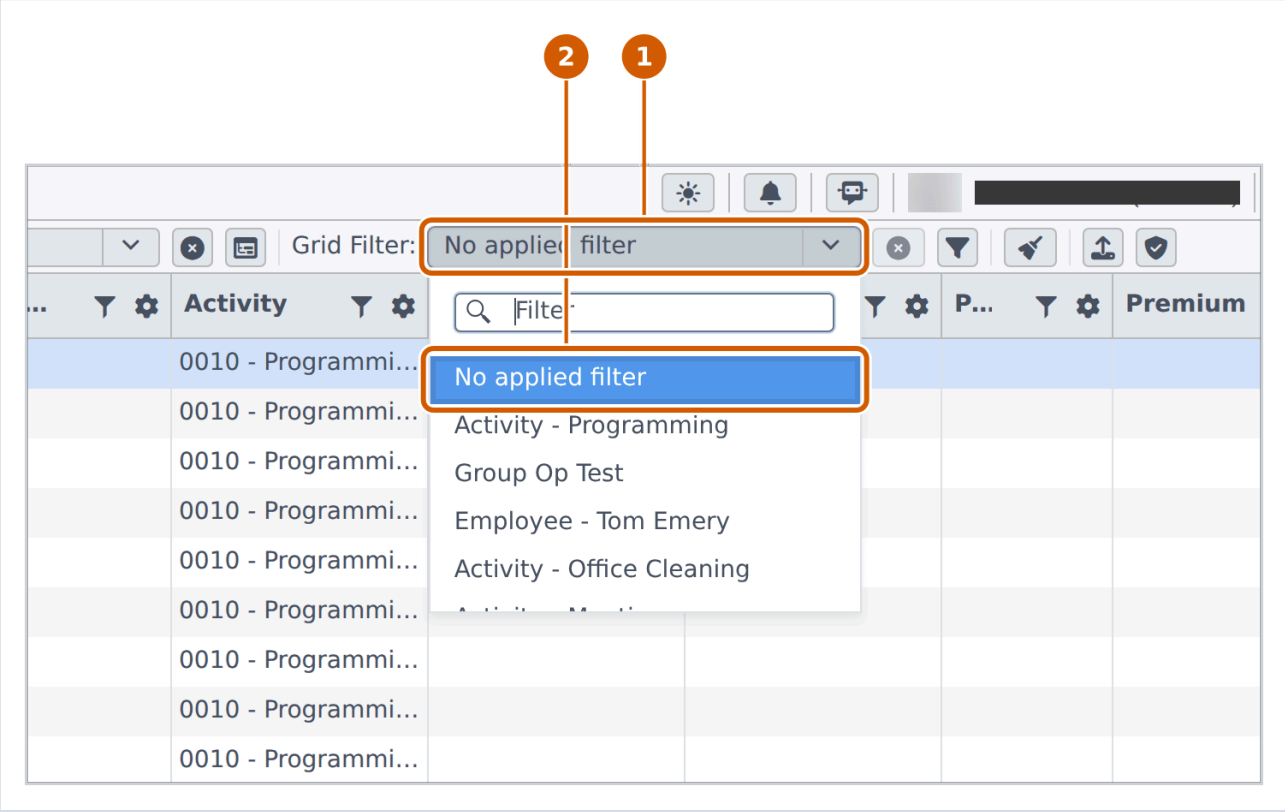
- Sign in to IRIS10.
- Know the shared data grid: columns, paging, search and sorting. See Data grid overview and basics.

Procedure

Apply a saved filter

1. On the grid toolbar, next to **Grid Filter**, click the filter list.

   The list opens with a **Filter** search box at the top, **No applied filter** as the first item, then your saved filters.



The Grid Filter: list, with a search box, No applied filter and your saved filters.

   1. **Filter search box**
   2. **No applied filter and saved filters**

2. (Optional) Type part of a filter name in the **Filter** box.

   The list shortens.

3. Click the name of the filter you want.

   The grid reloads with the filter applied. IRIS10 remembers this choice and applies the same filter the next time you open this screen.

Clear the applied filter

1. On the grid toolbar, click **Clear filter** (tooltip "Click to clear applied grid filter").

   The grid removes the filter, and the screen no longer opens with your previously chosen saved filter.

   > **Note:** On Time Card, **Clear filter** can be greyed out and unavailable.

   To clear the filter from the list instead, use steps 2 and 3.
2. Open the **Grid Filter:** list.

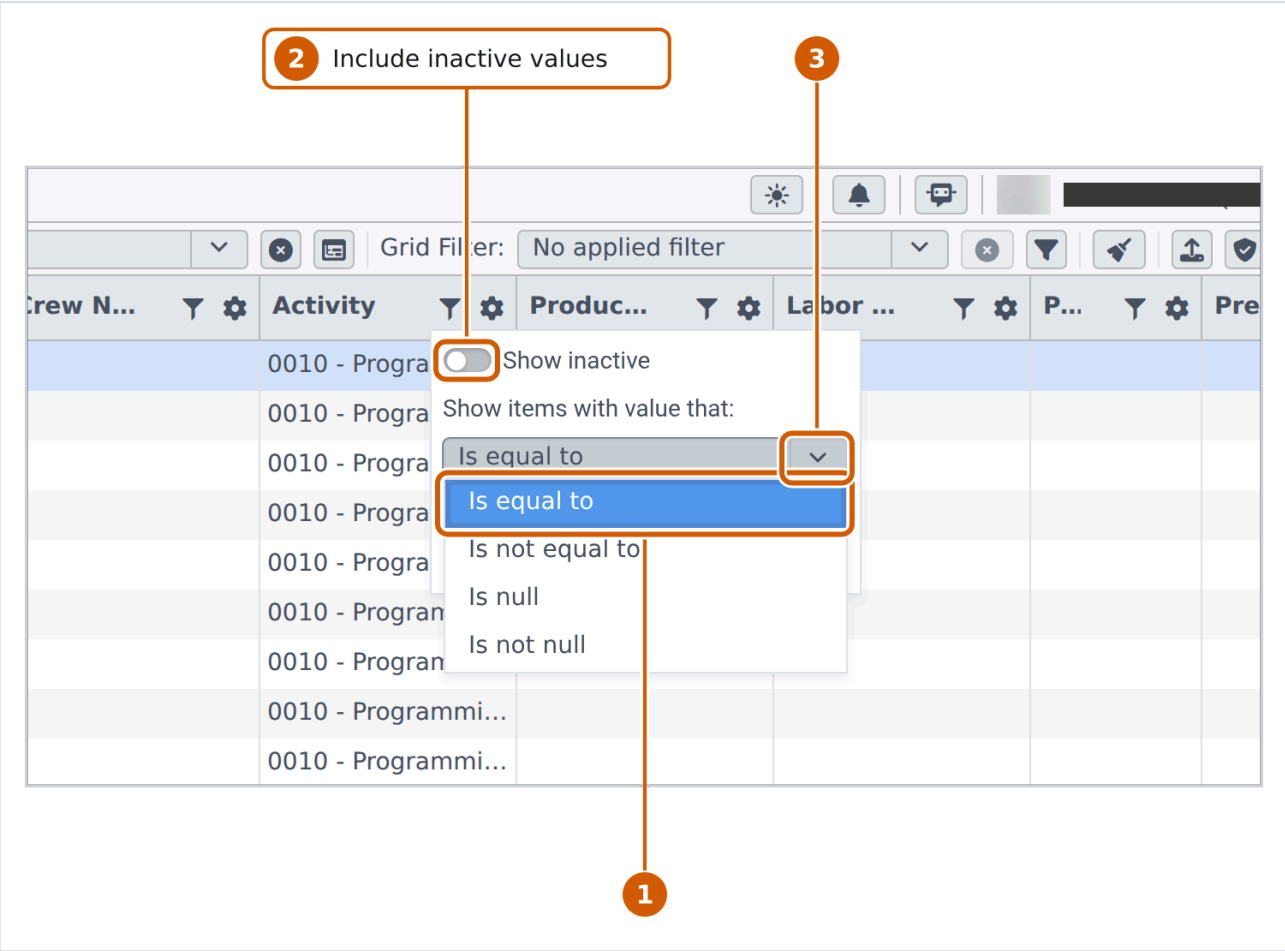
   The list opens.
3. Click **No applied filter**.

   The grid clears the filter.

Filter on one column from its header

1. In the column header, click the filter icon for the column you want to filter (for example, **Activity**).

   A filter menu opens with the text "Show items with value that", an operator list, a value list, and **Filter**, and **Clear** buttons.



Column filter menu for Activity with the operator list open.

1. **Operators**
2. **Include inactive values**
3. **Filter and Clear**

2. Open the **Operator** list.

   The list shows the operators for the column.

3. Choose an operator, such as **Is equal to**, **Is not equal to**, **Is null**, or **Is not null**.

   The menu selects the operator. The operators offered depend on the column. The **Activity** column offers **Is equal to**, **Is not equal to**, **Is null**, and **Is not null**.

4. To include inactive values in the value list, turn on the switch with tooltip "Include inactive values in this list."

   The value list includes inactive values. The switch is off by default.

5. Choose the value to filter on.
6. Click **Filter**.

   The grid shows only rows matching the condition.

7. To remove the column filter, open the menu again.

   The filter menu opens.

8. Click **Clear**.

The column filter is removed.

Build and apply a filter in the filter editor

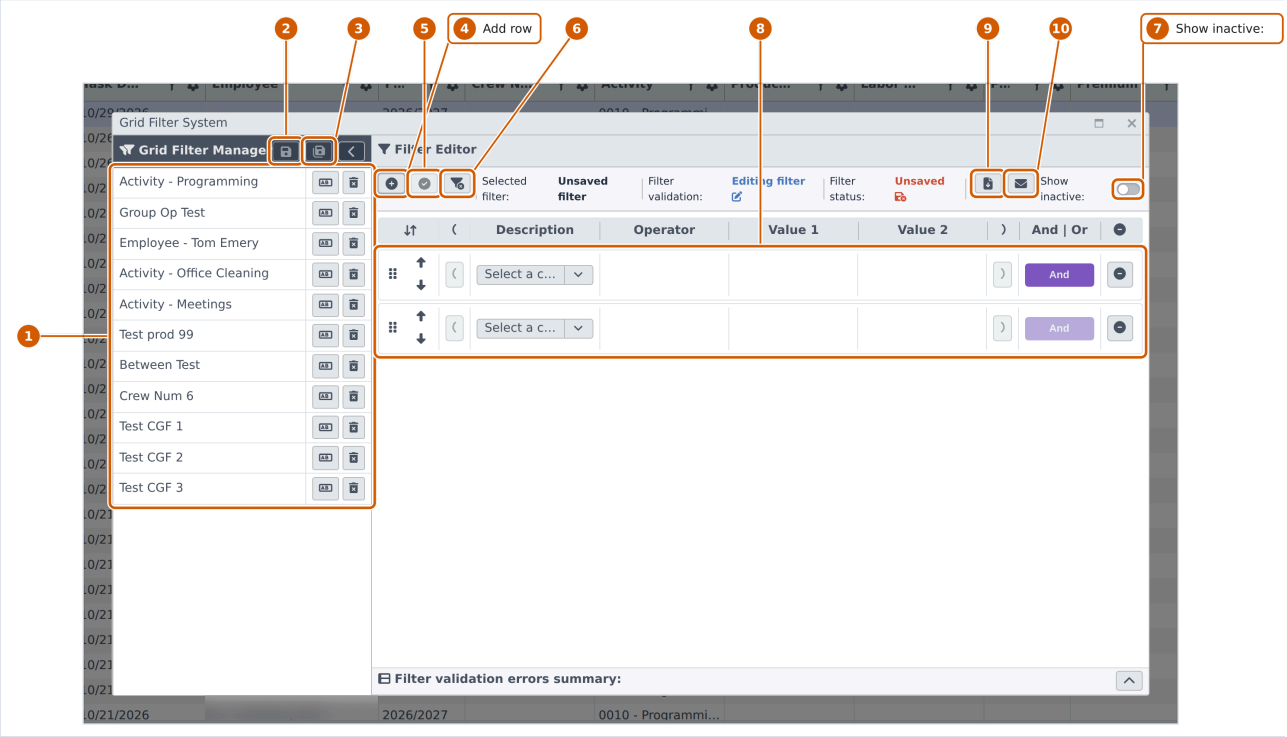
1. On the grid toolbar, click **Filter editor** (tooltip "Click to open grid filter editor").

   A window opens with your saved filters listed on the left and the **Filter editor** on the right.
2. If the screen has a child grid, under **Target grid**, click **Parent** or **Child** to choose which grid you are filtering.

   > **Note: Target grid:** appears only on screens with a child grid.

3. Click the add row button (tooltip "Click to add a filter row").

   A new condition row appears showing "Select a column..." An empty editor shows "Filter empty. Add a row to get started."



The filter editor window: your saved filters on the left, a new condition row in the editor on the right.

1. **Your saved filters**
2. **Save**
3. **Save As**
4. **Add row**
5. **Apply**
6. **Clear**
7. **Show inactive**
8. **Condition row**
9. **Export**
10. **Email to IRIS support**

4. In the **Description** column of the row, select the grid column to filter on.
5. In the **Operator** column, choose the comparison.
6. Enter **Value 1**.

   When you apply the filter, the grid ignores a row that has an operator but no value (other than `IS NULL` or `IS NOT NULL`).
7. For a **Between** comparison, enter **Value 2**.

   When you apply the filter, the grid ignores a **Between** row that is missing a value.
8. To include inactive values in the value lists, turn on **Show inactive:**.

   Inactive values appear in the editor's value lists. The switch is off by default.
9. To add another condition, click the add row button again.

   A new condition row appears.
10. In the **And | Or** column of the earlier row, choose **And** or **Or**.

    If you leave **And | Or** blank, IRIS10 uses And.
11. To group conditions, set an open parenthesis on the first row of the group.
12. Set a close parenthesis on the last row of the group.

    Every open parenthesis needs a matching close parenthesis. Otherwise, validation reports the groups as unbalanced.
13. To remove a condition, click the delete button at the end of its row.

    The editor removes the row.
14. Check the **Filter validation:** indicator and the validation results panel.

    The panel shows "Good news. No filter validation errors found" when the filter is valid. An OR-grouping warning still lets the filter apply. You must fix an unbalanced-group error first.
15. Click the apply button (tooltip "Click to apply the current filter.").

    The grid shows only matching rows. The pager shows the count after **Filter results:**. If you apply an empty filter, the grid clears its filter.
16. To start over, click the clear button (tooltip "Click to clear the current filter").

    The editor clears its filter.

Save a new filter

1. Build the filter in the **Filter editor** as described in "Build and apply a filter in the filter editor."
2. Click **Save As** (tooltip "Click to save a copy of the current filter").

   A window asks you to "Enter the name of your filter."
3. Type a name.
4. Confirm the name.

   The filter appears in your saved filter list.

   > **Note:** The name cannot be blank, cannot be `Default` in any letter case, and must differ from your other filter names on this screen, ignoring letter case.

Change a saved filter

1. In the filter editor window, click the saved filter in the left-hand list.

   Its conditions load into the **Filter editor** and **Selected filter:** shows its name. The list contains only filters you created for this screen.
2. Change the conditions.
3. Click **Save** (tooltip "Click to save the current filter").

   IRIS10 replaces the saved filter's conditions with the ones now in the editor.

Rename a saved filter

1. In the filter editor window, click the rename button on the filter's row in the list.

   If the filter has unsaved edits, the prompt "Save current edited filter?" appears with **Save** and **Cancel**.
2. Type the new name.
3. Confirm the name.

   A blank name shows "Filter name must not be empty."

Delete a saved filter

1. In the filter editor window, click the delete button on the filter's row in the list.

   IRIS10 removes the filter and all its conditions. If this screen was set to open with that filter, it no longer does.

Export or send a filter to IRIS support

1. In the filter editor window, click the export button.

   IRIS10 downloads the current filter as a file.
2. Alternatively, click the email button (tooltip "Click to email the filter to IRIS support").

   IRIS10 sends the filter to IRIS support.

Reference

Grid toolbar filter controls

CONTROL	WHAT IT DOES
Grid Filter: list	Shows saved filters for this screen. Includes a **Filter** search box and **No applied filter** as the first item.
Filter editor	Opens the filter editor window (tooltip "Click to open grid filter editor").
Clear filter	Clears the applied grid filter (tooltip "Click to clear applied grid filter").
Filter results: (in pager)	Shows how many records the current filter returned.

Filter editor buttons and indicators

CONTROL (TOOLTIP)	PURPOSE
Save ("Click to save the current filter")	Saves changes to the selected saved filter.
Save As ("Click to save a copy of the current filter")	Saves the current filter under a new name.
Hide filter manager ("Click to hide filter manager")	Hides the saved filter list.
Rename / Delete (per saved filter)	Renames or deletes that saved filter.
Add row ("Click to add a filter row")	Adds a condition row.
Apply ("Click to apply the current filter")	Applies the editor's filter to the grid.
Clear ("Click to clear the current filter")	Clears the editor's filter.
Export	Downloads the current filter as a file.
Email ("Click to email the filter to IRIS support")	Sends the filter to IRIS support.
Show inactive: ("Include inactive values in the filter value lists.")	Adds inactive values to the value lists
Target grid: Parent / **Child**	Chooses which grid to filter; shown only on screens with a child grid.
Selected filter / **Filter validation** / **Filter status**	Show the loaded filter, validation result and status.

Filter editor row columns

COLUMN	USE
Open parenthesis	Starts a group of conditions.
Description	Grid column to filter on ("Select a column...").
Operator	Comparison to use.
Value 1	Value to compare against.
Value 2	Second value, used by **Between**.
Close parenthesis	Ends a group of conditions.
And \Or	How this row joins the next row; blank means **And**.
Delete	Removes the row.

Which filter a screen opens with (highest first)

ORDER	SOURCE
1	A screen link you followed. Applies to that visit only and does not change your saved filter.
2	The filter already in use when you return to a screen during your session.
3	The saved filter you last chose from the **Grid Filter:** list.
4	The screen's built-in default filter, if it has one.

ORDER	SOURCE
5	No filter

Built-in screen default filters

DEFAULT FILTER	APPLIES TO	SHOWS
Active + Active Road	Screens with both an Active and an Active Road column	Active records on active roads
Active	Screens with an Active column	Active records
Last 2 Years	Transaction screens with a task date; inventory transaction screens on inventory date	Records from the last two years (keeps large screens fast)
Unposted	Inventory Transfer	Transfers not yet posted
Not Posted to Timecard	Fuel Import Stage	Fuel records not yet posted to time cards
Active Road / Active Location / Active Employee	Screens with those columns	Active roads, locations or employees
Active Equipment	Edit Last PM list	Active equipment
Open Payments	Payment screens	Payments that are not complete, canceled or deleted

Filter messages

MESSAGE	MEANING / WHAT TO DO
`Filter empty. Add a row to get started.`	The editor has no rows; click the add row button.
`Good news. No filter validation errors found.`	The filter is valid.
`One or more group operators are unbalanced. Please correct them to validate the filter.`	Match every open parenthesis with a close parenthesis.
`Filter name must not be empty.`	Type a name before saving.
`Can not create a user filter with the name "Default".`	Choose a different name.
`No Custom Filters Available` / `You have no saved custom filters. Begin by creating a custom filter.`	You have no saved filters for this screen yet.
`Filter cleared and applied.`	An empty filter was applied, so the grid is unfiltered.
`The screen link filter was not applied. The link has expired. Open it again from the screen that made it.`	Go back to the original screen and open the link again.

MESSAGE	MEANING / WHAT TO DO
`The screen link has no filter.` / `The screen link has more than 10 rows.` / `The screen link name is longer than 60 characters.` / `The screen link has a group that it does not close.`	The link was rejected; the screen opens without that filter.
`You do not have access to Copy Grid Configurations.`	Ask your administrator for access to copy filters to other users.
`Source and destination user must be different.` / `Destination user is not a member of this tenant.`	Pick a different destination user when copying filters.
`These filters were copied under a new name, because the destination user already had that name or because the name is reserved: ...`	The listed copied filters were renamed for the destination user.

Screen link limits

A Screen link is a link from another screen that opens this grid with a filter already applied, for that visit only.

RULE	LIMIT
Rows	Up to 10
Name	Up to 60 characters; default name `Screen link`
Operators	`=`, `<>`, `>`, `>=`, `<`, `<=`, `Between`, `Contains`, `Not Contains`, `Starts With`, `Ends With`, `Not Starts With`, `Not Ends With`, `IS NULL`, `IS NOT NULL`
Values	Cannot contain `"`, `[`, `]`, `(`, `)` or `;`; dates as `MM/dd/yyyy` or `yyyy-MM-dd`; `Between` needs Value 2; `IS NULL` takes no value
Grouping	At most one parenthesis per row; groups must be closed

Tips and notes

> **Important:** Clicking **Clear filter** also stops the screen from reopening with your chosen saved filter. Choose a saved filter again to make it your screen's filter.

> **Note:** Saved filters are personal. Each user's list shows only the filters that user created for that screen, and filters are kept separate for each organisation you sign in to.

> **Note:** Saved filters are separate from grid configurations. Saving a filter does not save column layout, and choosing a grid configuration does not change your filter. See Grid configurations.

> **Tip:** A filter you saved earlier takes priority over the screen's built-in default.

> **Tip:** Rows with an operator but no value (except `IS NULL` / `IS NOT NULL`) and **Between** rows missing a value are skipped without a warning. If your results look too broad, check that every row has its values.

> **Note:** A warning about OR grouping does not block the filter; it still applies. Check that the results are what you expect.

> **Note:** IRIS10 sets built-in screen defaults from the screen's columns. You cannot rename, delete, or modify them.

> **Note:** Following a screen link applies its filter for that visit only; your saved filter for the screen does not change.

> **Tip:** If IRIS support asks for your filter, use the email button in the filter editor, or export the filter as a file.

Related topics

- Data grid overview and basics
- Grid configurations
- Grid viewing and editing