

# Quick Filter for Portal Views

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## 1 Functionality

**Quick Filter for Portal Views** is a fast to use, as-you-type filtering for each column of QPR Portal views. In addition to text filtering, there is also date filtering available where start and end dates can be defined and rows outside that range of days are filtered out.

Quick filtering is easier to use than building portal views using the Views Designer, so quick filter is suitable for ad-hoc use cases. Unlike portal views, quick filters cannot be saved.

## 2 Compatibility

Compatible with QPR 2017.1.

## 3 Installation

Edit the two directory variables (if necessary) inside **install.bat** to point to your QPR installation folders. The defaults are:

```
set QPR_PDATA=C:\ProgramData\QPR Software\QPR 2017\2017.1\  
set QPR_INETPUB=C:\inetpub\wwwroot\qpr2017-1\
```

Right-click on **install.bat** and select "Run as administrator" to start the installation.

Alternatively, you can also do the installation manually by following these steps (the files you will need are all located under the **install\_data** folder):

1. Apply patch **WAS.patch** to **C:\ProgramData\QPR Software\QPR 201X\201X.1\Servers\Templates\WAS\**.
2. Copy **quickfilter.tpl** to **C:\ProgramData\QPR Software\QPR 201X\201X.1\Servers\Templates\WAS\Common\**.
3. Apply patch **inetpub.patch** to **C:\inetpub\wwwroot\qpr201X-1\qprsoftware\**.
4. Copy the images in the images folder to **C:\inetpub\wwwroot\qpr201X-1\qprsoftware\portal\images\**.

After you've run install.bat (or patched/copied the files manually):

1. Configure the settings inside **quickfilter.tpl**.
2. You may need to increase number of items in a page in Portal views, because Quick filter is not able to get data from other pages. Search the current limit from Portal templates to find the place to make changes.
3. Clear QPR Portal template cache and web browser's cache.

## 4 Configuration

Configuration is done inside **quickfilter.tpl**, which also includes descriptions of the configurable variables. Some of the key settings include:

- **DATE\_FIELDS:** An array of fields which have a date filter. Other fields have text filter. Name of the field is a technical attribute name. Usually the name is the visible field name where there are spaces removed. Define all characters of the field name as lower case.
- **BLACKLIST\_FIELDS:** An array of fields which should not have any filter.
- **I18N\_SETTINGS.dateFormat:** Used date formatting in the portal. Following link describes how the date format is defined: <http://api.jqueryui.com/datepicker/> (see utility function formatDate).
- Also other **jQuery Datepicker** (which implements the calendar view) settings can be changed. The previous link contains all available settings.

## 5 Usage

- Click **Add filter** button to use filtering for a column, and type filtering text
  - o For text filters, the dialog will close automatically after the input field loses focus. The date filter dialog needs to be closed manually by clicking either the "Close" link or the filter icon.
- Preconfigured fields have the date filtering where there are start date and end date
- Multiple filters can be used at the same time
- Filtering is not preserved when the table is reloaded from server (e.g. in sorting)

## 6 Further development

- **drilldown:** in hierarchy views, all rows below the matching row in the hierarchy remain visible, although they are not matching.
- **level filtering:** in hierarchy views, the filtering is applied only for a certain level in the hierarchy. Rows in all other levels are always considered "matching" in the filtering logic.

## 7 Example

Element	Scorecard	Value	Filter
Number of customer complaints	Asia Sales Office	Q3 / 2017 0.12 %	Yellow circle, down arrow
Customer loyalty	Asia Sales Office	2017 6.80 pts.	Yellow circle, down arrow
Logistics Costs / Sales	Asia Sales Office	Q3 / 2017 21.90 %	Green circle, up arrow