How do I apply filters to a dashboard?

1. Overview

Filters let you narrow the data shown on a dashboard without changing the widgets themselves. You can filter by any field available in your data source — for example, by date, region, status, or user. Filters apply across all widgets on the dashboard at once, so every chart and table updates together.

2. When to Use

- You want to see data for a specific date range
- You want to view results for a particular region, team, or user
- You want to compare data by filtering on different values
- You want to set default filters so learners see relevant data when they open the dashboard

3. Concepts

Global Filter Bar – The filter strip at the top of a dashboard. Any filter you select here applies to all widgets on the dashboard at once.

Filter Field – A column from your data source that you can filter on, such as Region, Status, or Submission Date.

Applicable Values – The list of actual values available for a filter field. Only values that exist in your data are shown, so you always pick from real options.

Date Presets – Quick date range options such as Today, Yesterday, Last 7 Days, Last 30 Days, and Custom Range. These save time when filtering by date.

Per-Widget Filter – A filter set on an individual widget during widget configuration. It applies only to that widget, not the entire dashboard.

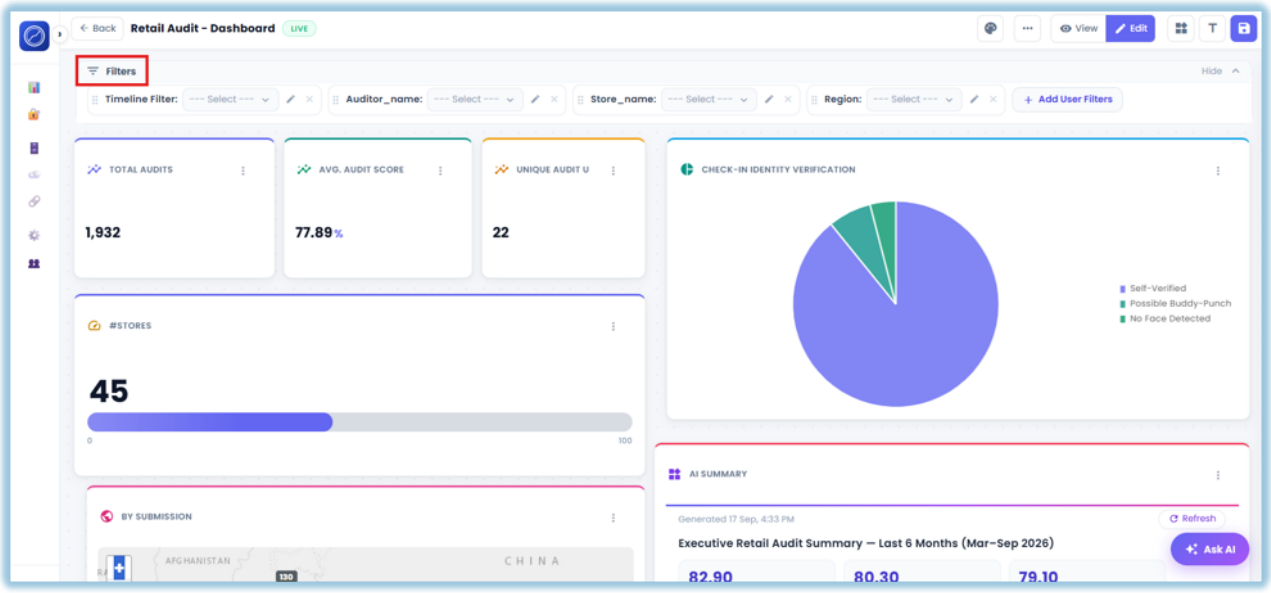
Filter Default – A pre-selected filter value that the admin sets for learners. When a learner opens the dashboard, this value is already applied.

4. Set Up Guide

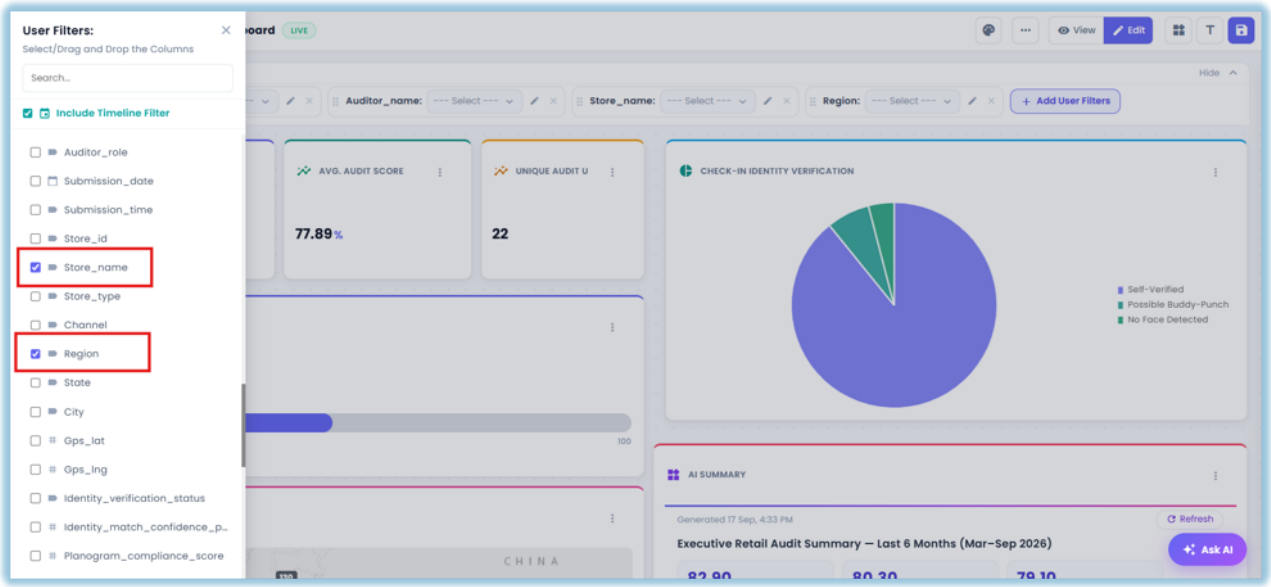
Open Vantage from the Vantage Dashboard widget on the Home Page and open the dashboard you want to filter.

Apply a Global Filter

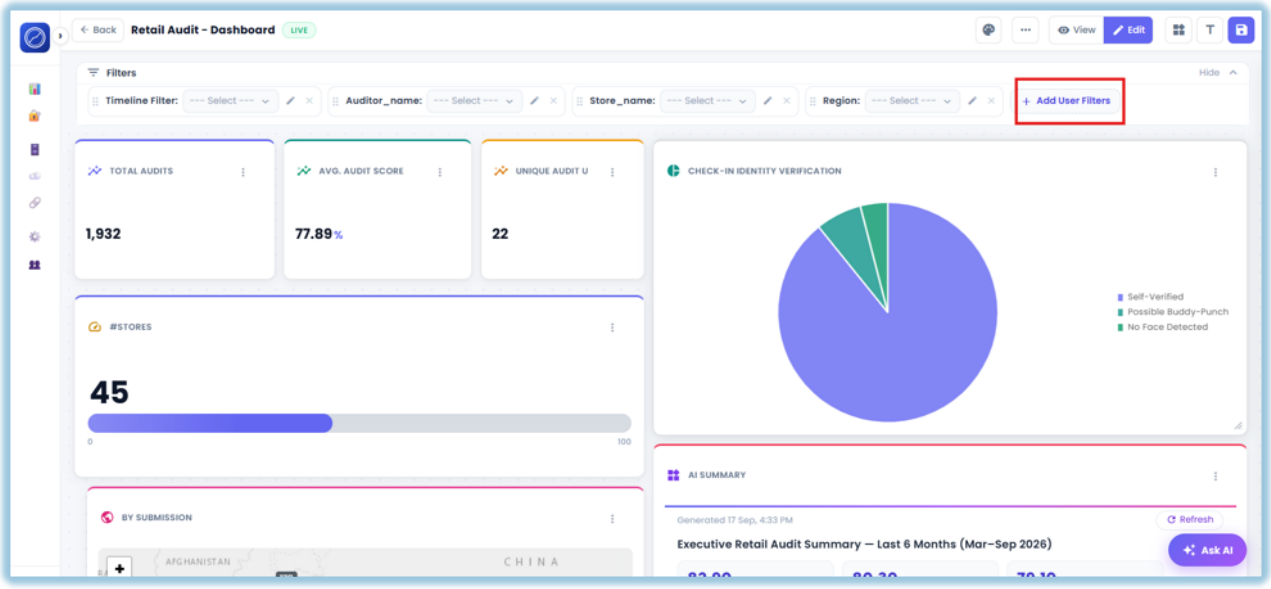
1. Click on the filter bar at the top of the dashboard



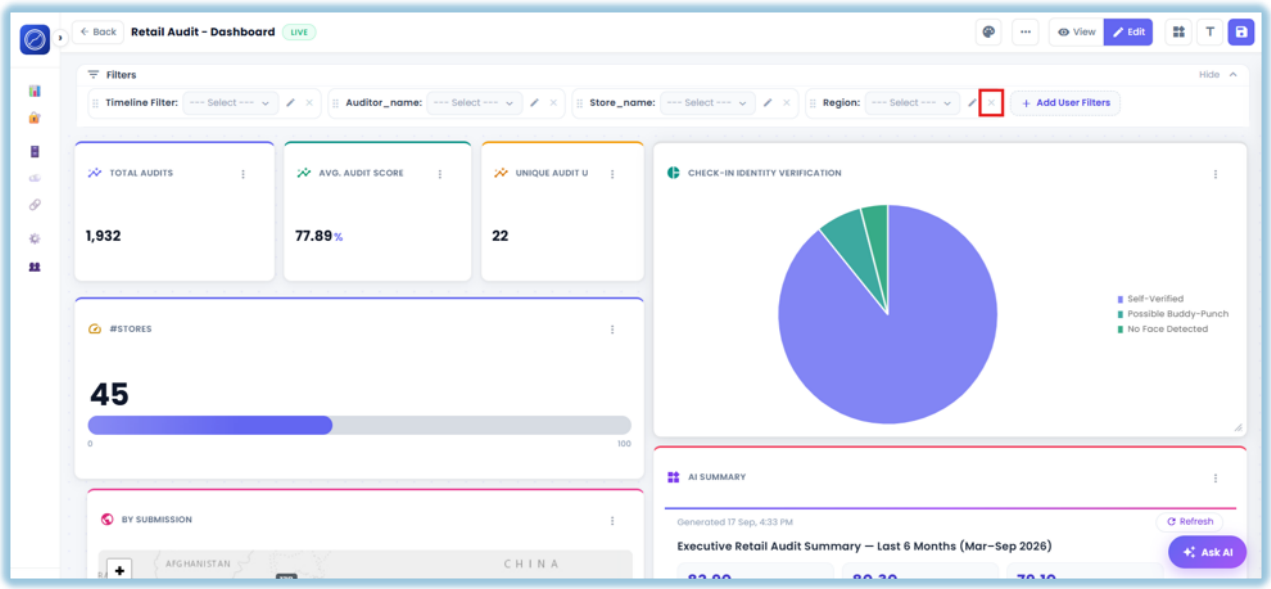
2. Select the field you want to filter by (for example, Region or Status)
3. Choose one or more values from the list of applicable values
4. The filter is applied immediately — all widgets on the dashboard update to show only the matching data



5. To add more filters, repeat the steps for another field

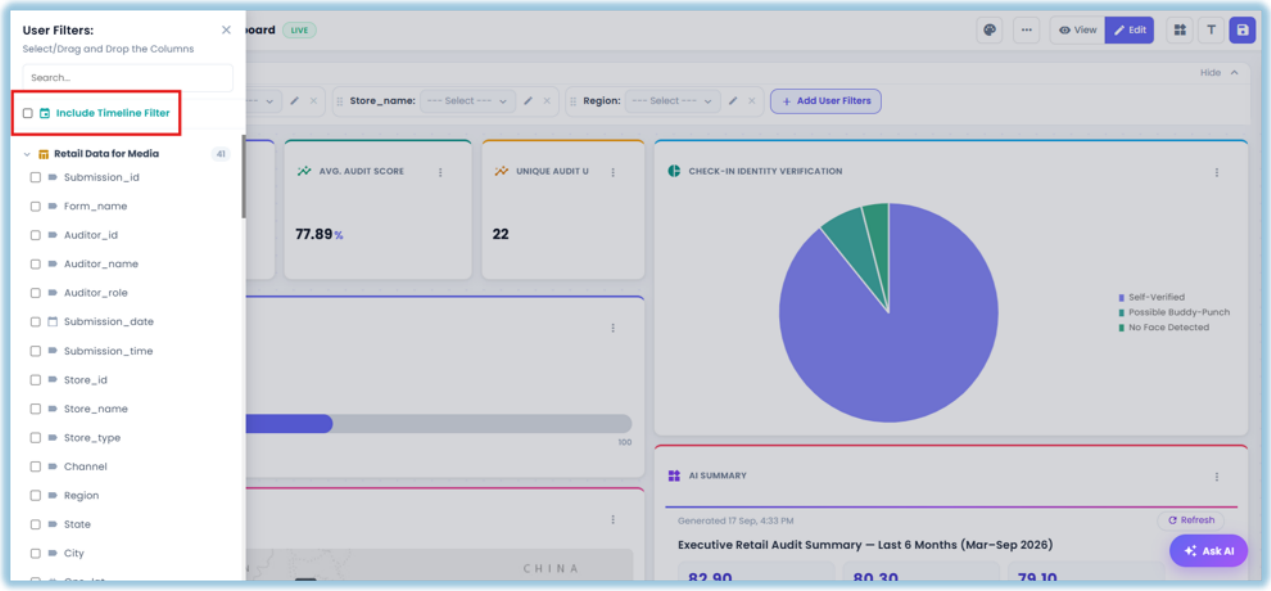


6. To clear a filter, click the X on the filter chip

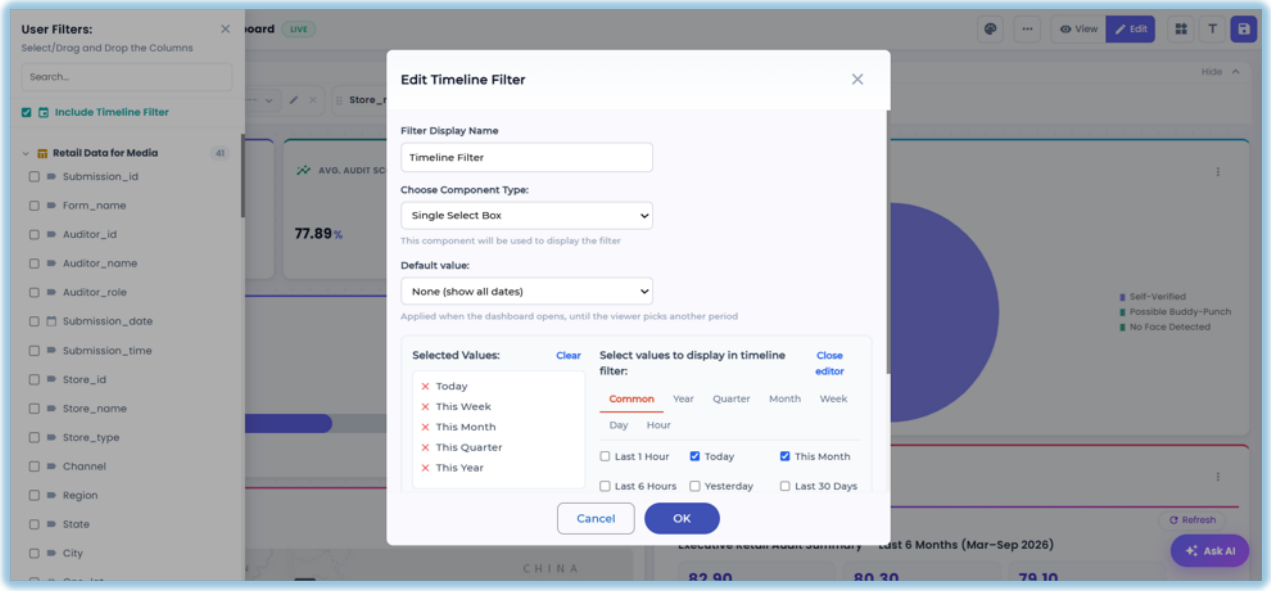


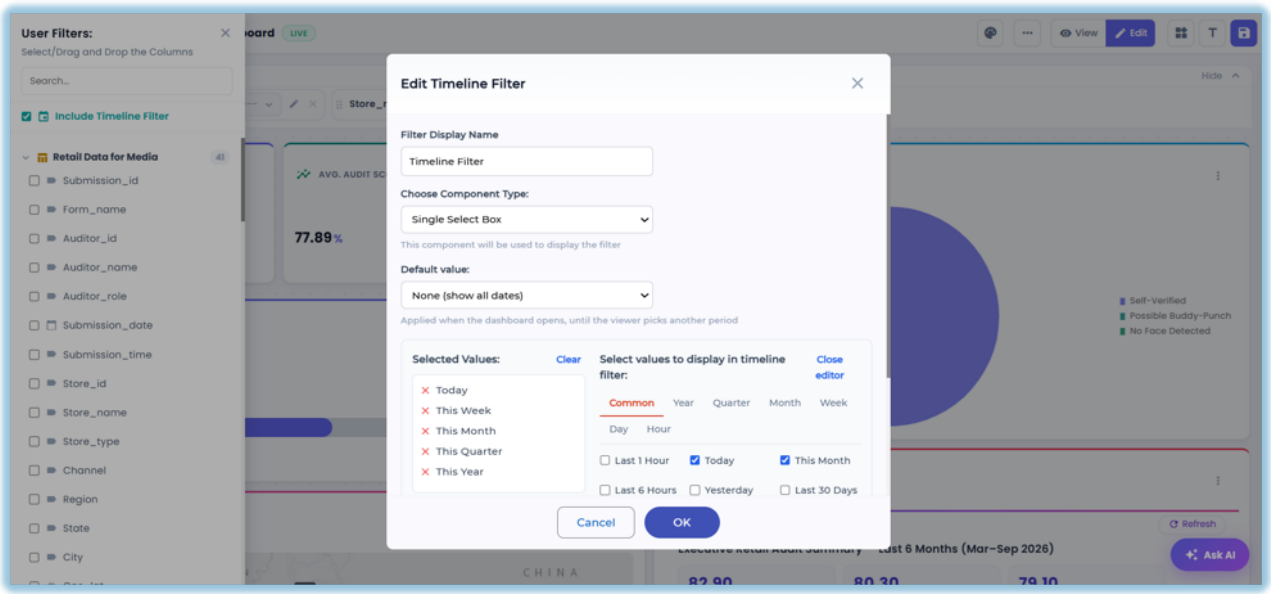
Apply a Timeline Filter

1. Click on the date Timeline feild in the filter bar

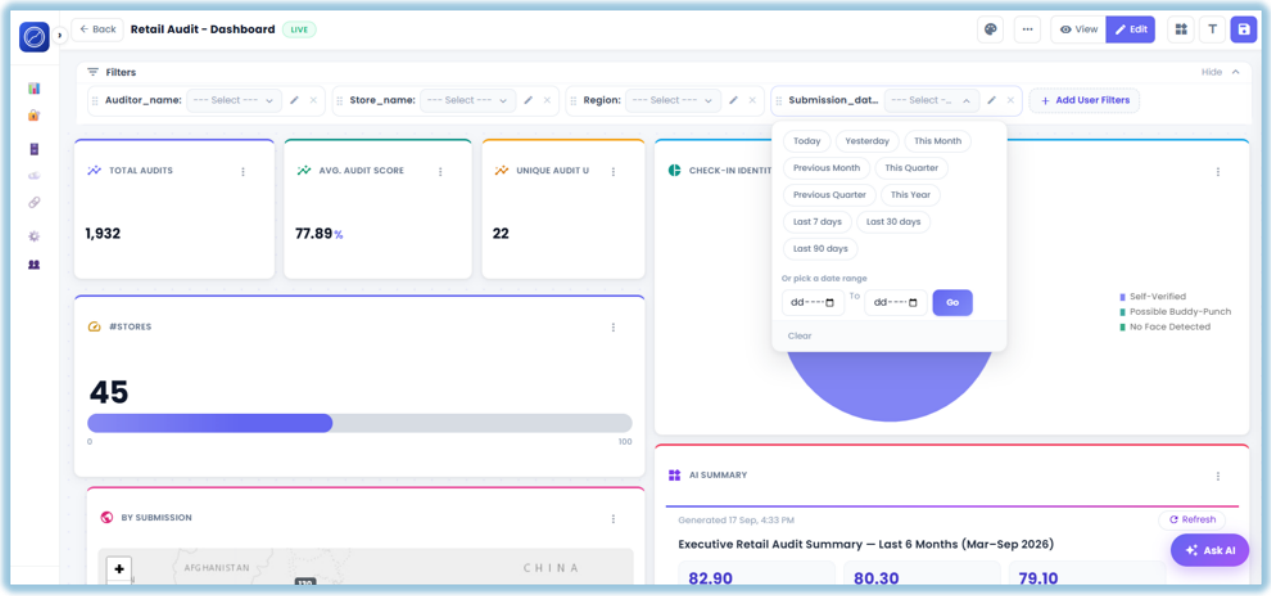


2. Choose a preset such as Today, Yesterday, Last 7 Days, or Last 30 Days





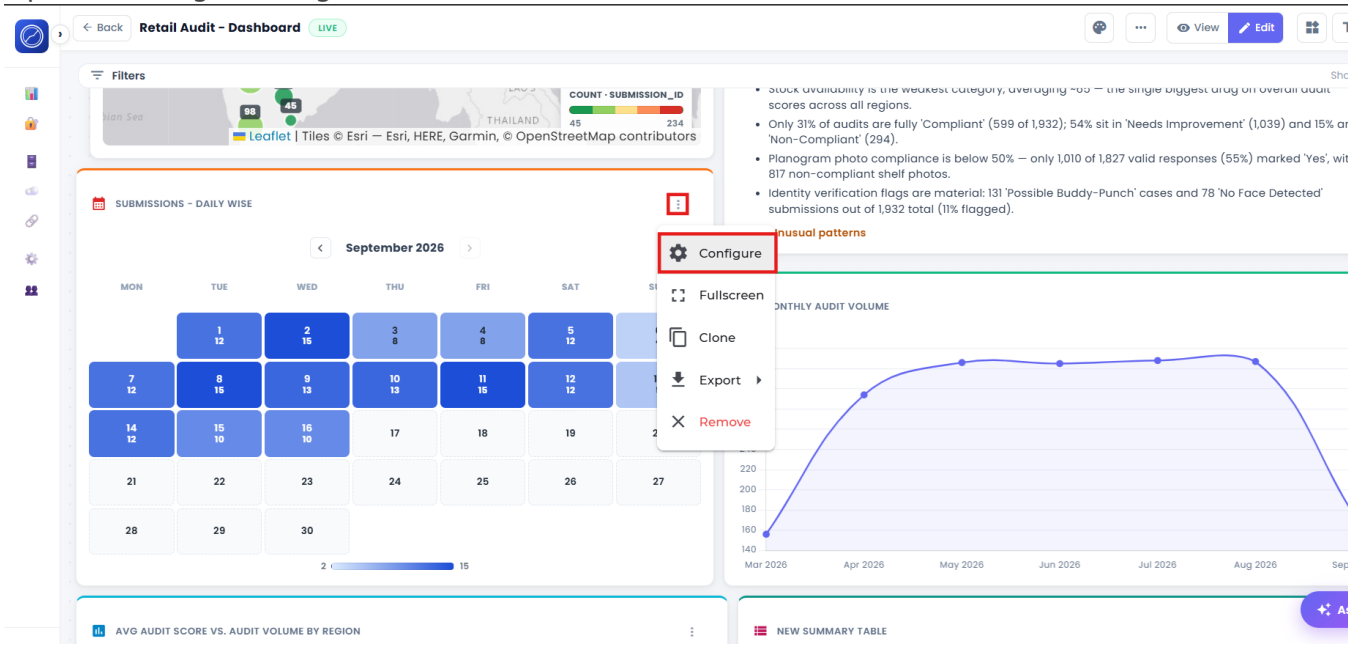
3. Or select Custom Range and pick a start and end date



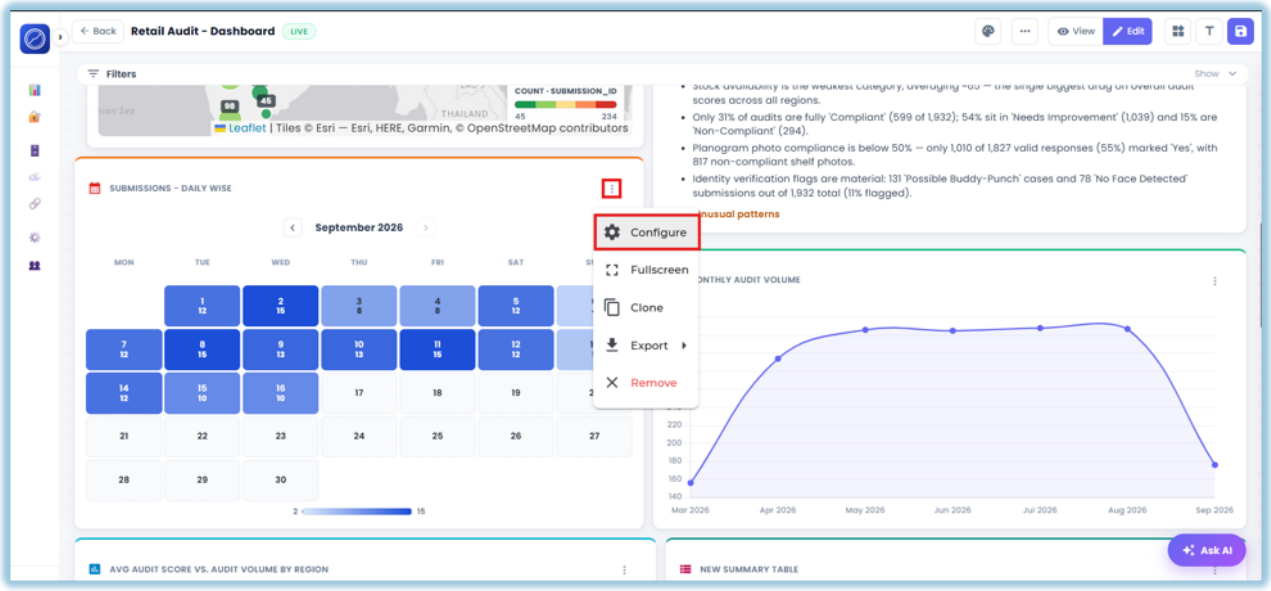
4. All widgets update to show data for the selected date range

Set a Per-Widget Filter

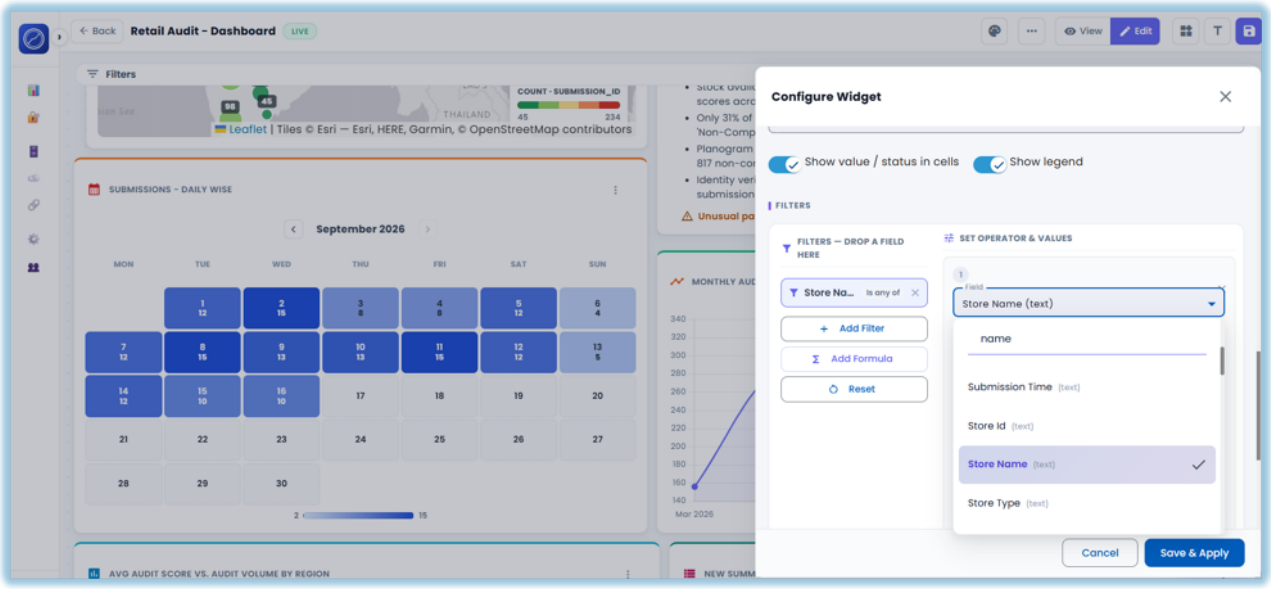
1. Open the widget configuration



2. Go to the Filters section



3. Select the field and values you want to filter on



4. This filter applies only to that widget, not to the rest of the dashboard
5. Save the widget configuration

5. User View

Learners who access a shared dashboard can use the global filter bar to narrow the data they see. They can select values from the available filter fields and use date presets.

What learners see: The global filter bar at the top of the dashboard with available filter fields Only applicable values for each field (values that exist in their data) Date presets such as Today, Yesterday, Last 7 Days, and Last 30 Days Filter chips showing which filters are currently active If the admin has set filter defaults, those values are pre-selected when the learner opens the dashboard

6. Best Practices

Use date presets for quick filtering instead of picking dates manually each time Set filter defaults for learners so they see the most relevant data on first open Use global filters when you want all widgets to reflect the same criteria Use per-widget filters only when a specific widget needs a different scope from the rest Clear unused filters to avoid seeing empty or unexpected results

7. Related Links

How do I create a dashboard? How do I add a widget to a dashboard? How do I arrange and resize widgets?

FAQs

Do filters change the actual data?
No. Filters only change what is displayed on the dashboard. Your data remains unchanged.

Can I apply multiple filters at the same time?
Yes. You can select values across multiple fields. All filters are applied together, so the dashboard shows only the data that matches all selected filters.

Do learners see the same filters I set?
Learners see the global filter bar and can choose their own values. If you set filter defaults, those values are pre-selected for learners when they first open the dashboard.

What is the difference between a global filter and a per-widget filter?
A global filter applies to all widgets on the dashboard. A per-widget filter applies only to the widget it is configured on.

8. Version Notes

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