Infoview Training 5E - Advanced Concepts: Adding Filters

NOVEMBER 2025

Introduction

Intro

This Infoview Training 5E advanced concepts module provides an overview of adding filters.

It is provided by the Minnesota Department of Health WIC Program.

Date

Today is now November 20, 2025.

Purpose

The following is for anyone who has filtered their report output after exporting it to Excel.

This module will show how to use input controls to filter our report outputs so that we can work more efficiently and use Infoview more effectively.

Input controls

Adding input controls and dimensions

Identify dimension

We're starting exactly where we left off in the last module.

We can also add our own input controls.

It's a scary name for a simple concept.

Input controls allow us to further filter our report output once we've refreshed or run the query.

For instance, what if we wanted to filter by language?

Our first step is to identify the dimension used for language in this tab.

Click the first data row in the Language column.

Filter bar

Our dimension, as shown in the formula bar, is CERTMCADescriptionLANG.

This is going to be our filter.

As we learned in previous modules, input controls are found on the filter bar.

Click the Show filter bar icon.

Manage filters

To add an input control, we click the blue Manage filters icon.

Hover over the icon then click it.

<no audio> Hover over the blue icon in the filter bar then click it.

New input control

And select New Input Control.

New control

Since we are currently working in the Certs & MCAs tab, the input control will automatically be applied to that output.

Per the message, we must first choose what we want to filter by.

We find our options in the Object dropdown.

Go ahead and click it.

<no audio> Click the Object dropdown.

Find dimension

We're looking for our dimension: CERTMCADescriptionLANG.

Click below the scroll bar until it displays in the dropdown and then select it.

<no audio> Find dimension: CERTMCADescriptionLANG. Click below the scroll bar until it displays in the dropdown then select it.

Select dimension

<no audio> Find dimension: CERTMCADescriptionLANG. Click below the scroll bar until it displays in the dropdown then select it.

Current target

Current target

Notice that we now have the option of making this a document filter, which means it impacts both tabs.

We can apply our filter to multiple tabs as long as the dimensions are from the same queries.

Curren target 1

However, we know that this report uses dimensions from different queries for the NE Contacts and Certs & MCAs tabs.

So, for **this** report, if we wanted to filter both tabs, we would need to identify the language dimension used in the NE Contacts tab and create another input control specifically for that tab.

Input control properties

Name filter

Infoview automatically inserts the dimension we selected into the Name field, but the name displays in the filter bar, so let's rename it Language.

Double-click into the Name field to highlight the current name…

Rename filter

…and type: Language.

Description

We can enter a description.

For instance, if we are filtering by clinic ID, maybe we want to specify that the Clinic ID is where the participant currently belongs, where benefits were issued, where they were certified, etc.

Although the name, language, is descriptive enough let's still add a description to see where it displays once we save our filter.

Click into the Description text box.

Description 1

Let's add: Preferred language spoken by household.

Type the description as shown.

Properties

The Input Control Properties allows us to choose what kind of filter we want to use.

Go ahead and click the Type dropdown.

Filter type

The types we can choose from are based on what works with our dimension.

For instance, if we were to filter on…

<no audio – slide transition> Slide transitions to New Control modal for Age dimension.

Filter type 1

…an age column, we would have a few more types that can be used with a number.

The following is an overview of our filter types.

<no audio – slide transition> Slide transitions to topic slide.

Multi-list

Multi-List allows us to select one or more options (or checkboxes) in the input control's list.

These are the operators and how they allow us to filter.

For Multi-List, In List is the most common operator.

Click the button when ready to continue.

<no audio> Operators: In List, Not in List.

<no audio> How they filter: include selected, exclude selected.

List

List allows us to select one option in the input control.

Equal is the most common operator.

Click the button when ready to continue.

<no audio> Operators: Equal, Not Equal, Greater Than, Greater Than or Equal to, Less Than, Less Than or Equal to.

<no audio> How they filter: include selected one, exclude selected one, include all in list after selected one, include selected one and all after, include all in list before selected one, include selected one and all before.

Spinner

Spinners can be used with numbers, like age, and allow us to filter based on a key value that displays on the right next to the plus sign.

The operators impact the key value and those that provide a number range would be most commonly used.

The minimum and maximum values are optional and set limits for this key value.

Both the Increment, which defaults to 1, and the default value are required.

The default value must be equal to or fall between the min and max if set.

The input control's plus and minus change the key value.

Click the button when ready to continue.

<no audio> Operators: Equal, Not Equal, Greater Than, Greater Than or Equal to, Less Than, Less Than or Equal to.

<no audio> How they filter: include only the key value, include all but key value, include all with higher value than key value, include key value and all that are higher, include all with lower value than key value, include key value and all that are lower.

Slider

The slider is similar to the spinner and can also be used with numbers.

It allows filtering based on a key value.

Again, the operators impact the key value that displays in the textbox under the slider.

Operators that provide a number range would be most commonly used.

The minimum and maximum values are required for sliders, and again, set limits for the key value.

Increment and default values are required, and the default value must be equal to or fall between the set min and max.

Clicking and dragging the circle changes the key value.

Click the button when ready to continue.

<no audio> Operators: Equal, Not Equal, Greater Than, Greater Than or Equal to, Less Than, Less Than or Equal to.

<no audio> How they filter: include only the key value, include all but key value, include all with higher value than key value, include key value and all that are higher, include all with lower value than key value, include key value and all that are lower.

How to use?

So, how would we use spinners or sliders?

Well, let's say we have a report that includes women, children, and infants in the output, and we want to be able to filter infants and children but only up to 24 months old.

We would set our type to slider, operator to greater than or equal to, our min and max to 0 and 24 respectively, and the default value to 0.

If we move the slider to 13 in the input control, we are including all participants 13 months and older, and we can never filter anyone older than 24 months from the output.

Click the button to continue.

Double slider

The double slider is another filter for numbers.

It allows filtering based on **two** key values, a minimum and maximum.

It has only two operators and “between" is typically used.

The minimum and maximum values, increment, and default min/max values are all required, and we would usually set the mins and maxes to match.

Clicking and dragging the left circle changes the minimum and clicking and dragging the right circle changes the maximum.

Click the button when ready to continue.

<no audio> Operators: Between, Not Between.

<no audio> How they filter: include key values and all greater than min and less than max; include all less than min and greater than max (do not include key values).

Entry field

The entry field can be used with pretty much any dimension, including numbers, dates, and text.

It is not case-sensitive, and all operators are available.

Click the button to continue.

Calendar

The last filter is Calendar, which can be used with dates, and again has all available operators.

Click the button to continue.

Summary

As we can see, there are a lot of different ways we can filter for the same thing and there is a lot of flexibility with how we use input controls.

Click the button to continue.

Save input control

OK. Back to creating our input control.

We are going to stick with Multi-List as our type and In List as our operator.

There is more functionality, but we can explore that on our own.

Go ahead and click the OK button.

Editing input controls

New input

The dot now displays on our filter icon, a button with our name “language” displays on our filter bar, and an active input control is added to the filter panel, which has an edit icon.

Before we continue, we should note that we can add as many filters as we want to our reports.

Edit input

That said, go ahead and hover over the Active Input Control button (notice the description) and its pencil icon then click edit.

<no audio> Hover over the Active Input Control button and pencil icon then click the edit icon.

Edit input 1

We can edit anything, including changing it completely by selecting another object.

Go ahead and just cancel.

<no audio> Click the cancel button.

Delete input

We can easily delete an input control by clicking the x icon on the button.

Go ahead and delete it.

<no audio> Click the delete icon on the input control button.

Undo delete

There is no confirmation message. It’s just gone.

Of course, that is what undo is for.

Click the undo icon.

Hover input

This time hover over the input control button then click it.

<no audio> Hover of the input control button on the filter bar then click it.

Settings

Click the wheel icon.

<no audio> Click the wheel (settings) icon.

Advanced settings

Take a gander then hover over and click Advanced settings at the bottom.

Edit input 1

Just another method to open the edit modal.

One last thing to mention.

Variables

Variables

Report developers also use variables, and they are found at the bottom of the list.

Variables 1

Variables are usually formulas packaged into either a dimension or measure.

And we can select variables to filter on.

<Transition slide>

<no audio> Slide transitions to report with Age column.

Convert formula

However, we can’t filter on a formula.

But what if we wanted to filter on Age in this report?

We can convert the formula to a variable simply by clicking the fx plus icon in the formula bar.

Hover over the icon then click it.

<no audio> Hover over the fx+ icon in the formula bar then click it.

Create variable

All we have to do is name our variable.

We usually use capital V underscore and then something appropriately descriptive.

Type: V_Age

Save variable

And click OK.

<no audio> Click the OK button.

New dimension

Our formula is now a variable, and a selectable dimension we can filter by.

New input control

If we create a new input control, at the bottom of our Objects list, is our new Age variable.

Summary

This concludes our review of advanced concepts in Infoview 4.3.

<Transition slide>

<no audio> Slide transitions to blank topic slide.

End slide

Thank you for taking the time to review this Infoview advanced concepts training module provided by the Minnesota Department of Health WIC Program.