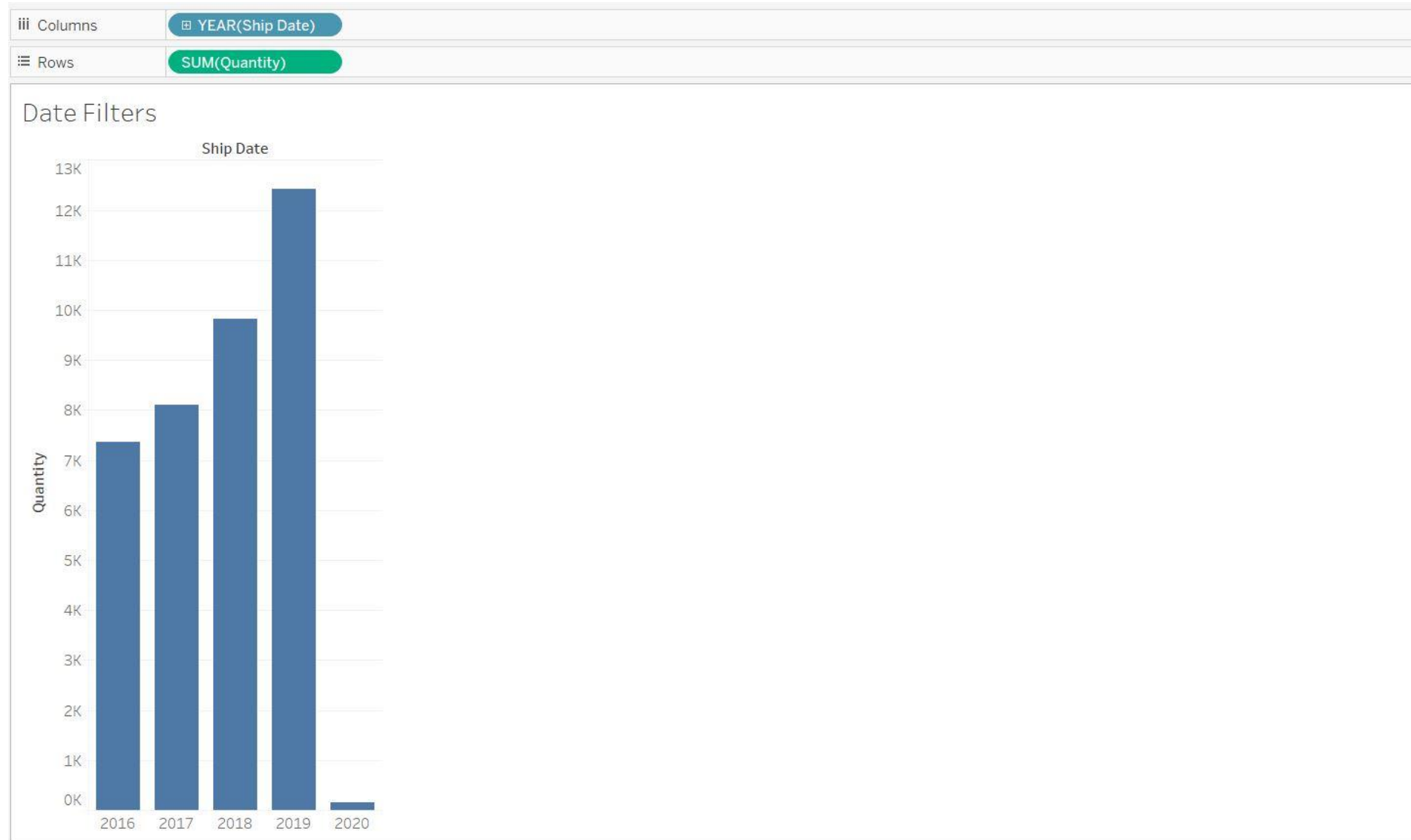


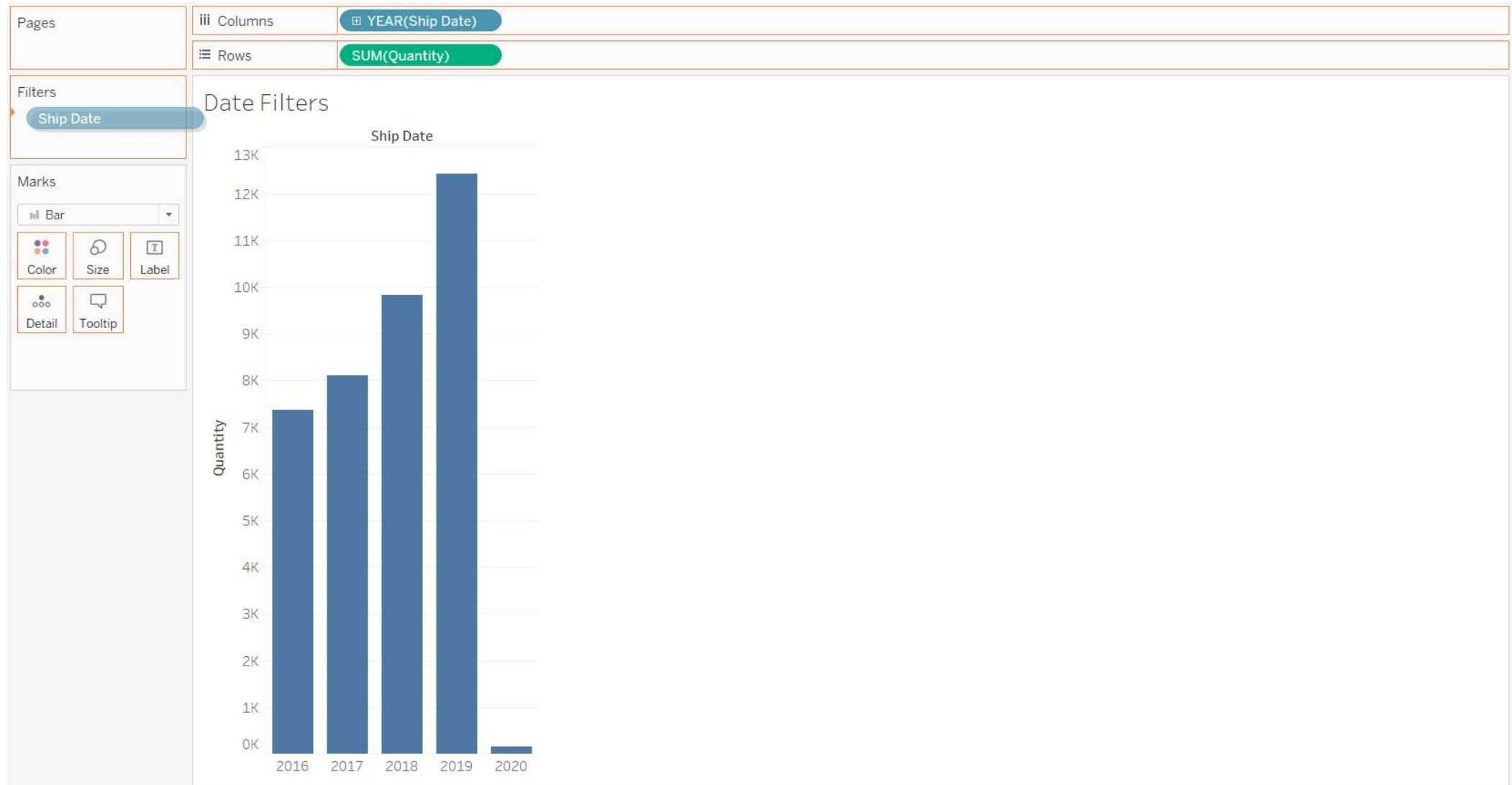
# HOW TO ADD A DATE FILTER

**STEP 1:** Assume that we have a Bar Chart view of Quantity Vs Ship Date



# HOW TO ADD A DATE FILTER

## STEP 2: Drag and drop the **Ship Date** to the Filters shelf



# HOW TO ADD A DATE FILTER

**STEP 3:** Filter **Field [Ship Date]** dialog box will appear  
Ensure that **Relative Date** option is selected  
Click **Next**

Filter Field [Ship Date] X

How do you want to filter on [Ship Date]?

- ☒ Relative Date
- ☐ Range of Dates
  - # Years
  - # Quarters
  - # Months
  - # Days
  - # Week numbers
  - # Weekdays
  - # Month / Year
  - # Month / Day / Year
- ☐ Individual Dates
  - # Count
  - # Count (Distinct)
  - ☐ Minimum
  - ☐ Maximum
- ☐ Attribute

Next > Cancel

# HOW TO ADD A DATE FILTER

**STEP 4: Filter [Ship Date]** dialog box will appear  
Click **Relative dates**

Filter [Ship Date] ✕

**Relative dates** Range of dates Starting date Ending date Special

Relative dates 27-08-2021 to 27-08-2021

Years Quarters Months Weeks **Days**

☐ Yesterday ☐ Last 3 days  
☒ Today ☐ Next 3 days  
☐ Tomorrow


☐ Anchor relative to Today ☐ Include null values


Reset OK Cancel Apply


# HOW TO ADD A DATE FILTER


**STEP 5:** There are many options to choose from under **Relative dates** section  
For e.g., Click **Years**


Filter [Ship Date] ×

 Relative dates

 Range of dates

 Starting date

 Ending date

 Special

Relative dates 27-08-2021 to 27-08-2021

Years

Quarters

Months

Weeks

Days

☐ Yesterday

☐ Last  days

☒ Today

☐ Next  days

☐ Tomorrow

☐ Anchor relative to

☐ Include null values

Reset

OK

Cancel

Apply

# HOW TO ADD A DATE FILTER

**STEP 6:** Select **Last** and use the up and down option to select the required years e.g.: **5**  
Click **OK**

Filter [Ship Date] X

Relative dates Range of dates Starting date Ending date Special

Relative dates 01-01-2021 to 31-12-2021

Years Quarters Months Weeks Days

☐ Previous year ☐ Last 3 years

☒ This year ☐ Next 3 years

☐ Next year ☐ Year to date

☐ Anchor relative to Today ☐ Include null values

Reset OK Cancel Apply

Filter [Ship Date] X

Relative dates Range of dates Starting date Ending date Special

Relative dates 01-01-2017 to 31-12-2021

Years Quarters Months Weeks Days

☐ Previous year ☒ Last 5 years

☐ This year ☐ Next 3 years

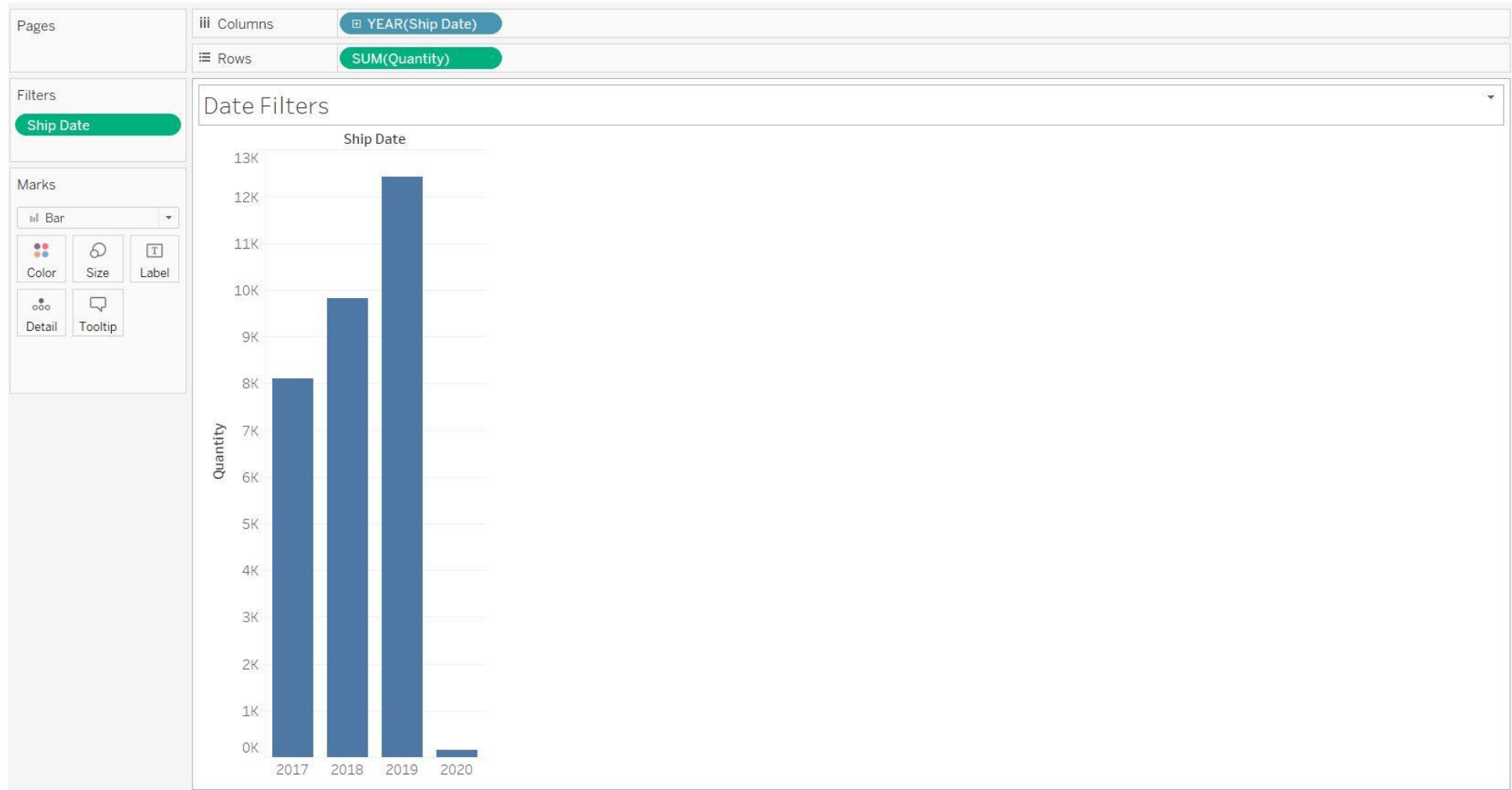
☐ Next year ☐ Year to date

☐ Anchor relative to Today ☐ Include null values

Reset OK Cancel Apply

# HOW TO ADD A DATE FILTER

**STEP 7:** The view is updated based on the Date Filter settings



# HOW TO ADD A DATE FILTER

## STEP 8: Right-click **Ship Date** and select **Edit Filter**





# HOW TO ADD A DATE FILTER

**STEP 9:** Filter [Ship Date] dialog box will appear

Filter [Ship Date] ✕

Relative dates Range of dates Starting date Ending date Special

Relative dates 01-01-2017 to 31-12-2021

Years Quarters Months Weeks Days

☐ Previous year ☒ Last 5 years

☐ This year ☐ Next 3 years

☐ Next year ☐ Year to date

☐ Anchor relative to Today ☐ Include null values

Reset OK Cancel Apply

# HOW TO ADD A DATE FILTER

**STEP 10:** If required we can change the Anchor to relative date

The default Anchor date will be Today (i.e., date the workbook is being accessed)

Click the **Anchor relative to** option and enter the required date  
e.g.: 28-08-2019

Click **OK**

Filter [Ship Date] X

Relative dates Range of dates Starting date Ending date Special

Relative dates 01-01-2015 to 31-12-2019

Years Quarters Months Weeks Days

☐ Previous year ☒ Last 5 years

☐ Anchor year ☐ Next 3 years

☐ Next year ☐ Year to anchor

☒ Anchor relative to 28-08-2019 ☐ Include null values

Reset OK Cancel Apply

< August 2019 >

S	M	T	W	T	F	S
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Today: 28-08-2021

Filter [Ship Date] X

Relative dates Range of dates Starting date Ending date Special

Relative dates 01-01-2015 to 31-12-2019

Years Quarters Months Weeks Days

☐ Previous year ☒ Last 5 years

☐ Anchor year ☐ Next 3 years

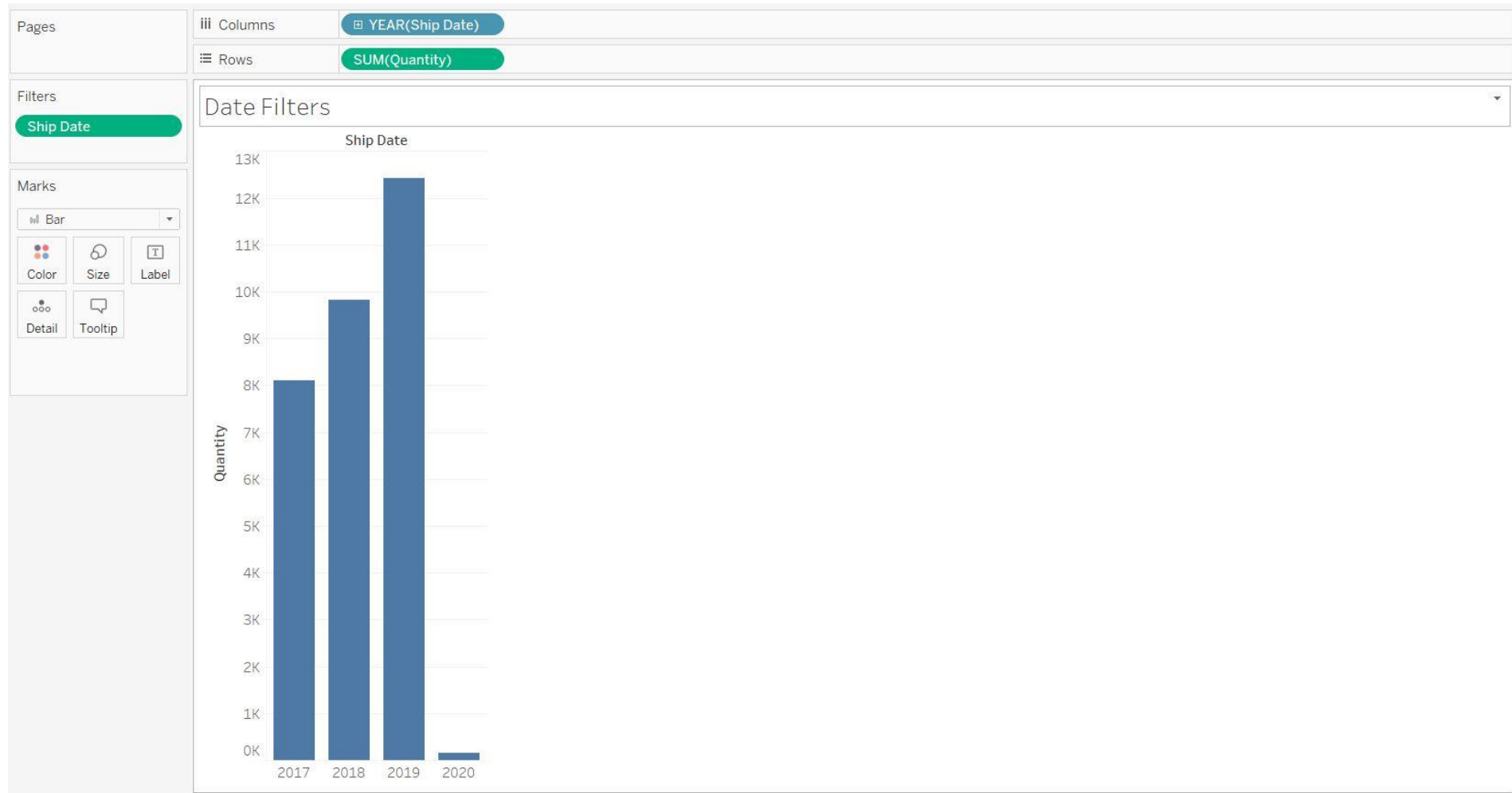
☐ Next year ☐ Year to anchor

☒ Anchor relative to 28-08-2019 ☐ Include null values

Reset OK Cancel Apply

# HOW TO ADD A DATE FILTER

**STEP 11:** The view is updated based on the new Date Filter settings i.e., we see all 5 years in the data source from 2019



# HOW TO ADD A DATE FILTER

## STEP 12: Right-click **Ship Date** in the Filters shelf and select **Show Filter**



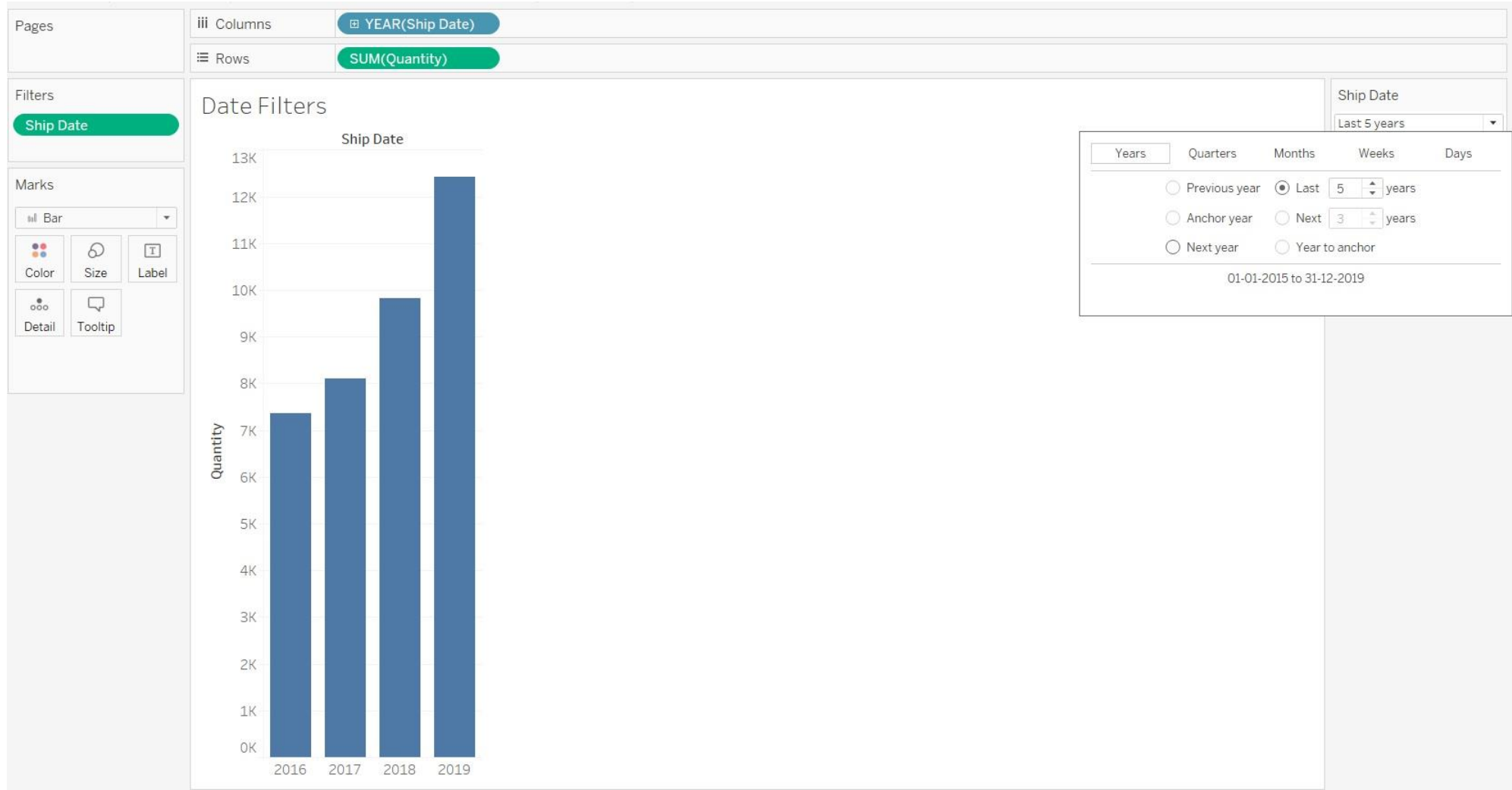
# HOW TO ADD A DATE FILTER

**STEP 13:** Ship Date Filter must be visible on Top Right side of the view



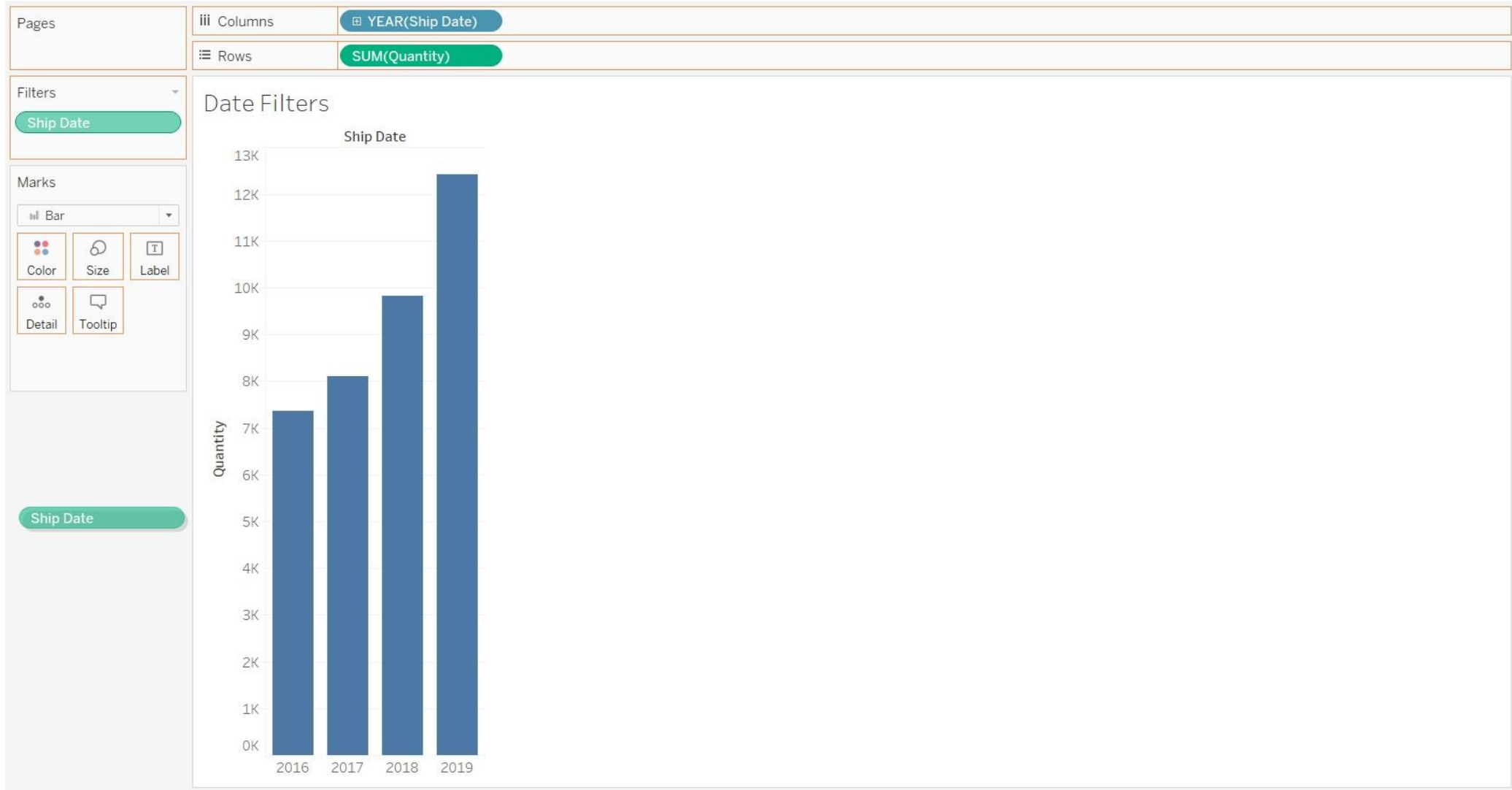
# HOW TO ADD A DATE FILTER

**STEP 14:** If required we can edit the filter options by clicking on the drop-down of the filter



# HOW TO ADD A DATE FILTER

## STEP 15: Remove the **Ship Date** from the Filters shelf



# HOW TO ADD A DATE FILTER

## STEP 16: Drag and drop the **Ship Date** to the Filters shelf





# HOW TO ADD A DATE FILTER

**STEP 17:** Select the required discrete date part e.g.: **Months**  
Click **Next**

Filter Field [Ship Date] ×

How do you want to filter on [Ship Date]?

<input type="checkbox"/>	Relative Date
<input checked="" type="checkbox"/>	<b>Range of Dates</b>
<input checked="" type="checkbox"/>	Years
<input checked="" type="checkbox"/>	Quarters
<input checked="" type="checkbox"/>	<b>Months</b>
<input checked="" type="checkbox"/>	Days
<input checked="" type="checkbox"/>	Week numbers
<input checked="" type="checkbox"/>	Weekdays
<input checked="" type="checkbox"/>	Month / Year
<input checked="" type="checkbox"/>	Month / Day / Year
<input type="checkbox"/>	Individual Dates
<input checked="" type="checkbox"/>	Count
<input checked="" type="checkbox"/>	Count (Distinct)
<input type="checkbox"/>	Minimum
<input type="checkbox"/>	Maximum
<input type="checkbox"/>	Attribute

# HOW TO ADD A DATE FILTER

**STEP 18:** Select the required months e.g.: April, May and June  
Click **OK**

Filter [Month of Ship Date] X

General Condition Top

☒ Select from list ☐ Custom value list ☐ Use all

Enter search text

☐ January  
☐ February  
☐ March  
☒ April  
☒ May  
☒ June  
☐ July  
☐ August  
☐ September  
☐ October  
☐ November

All None ☐ Exclude

Summary

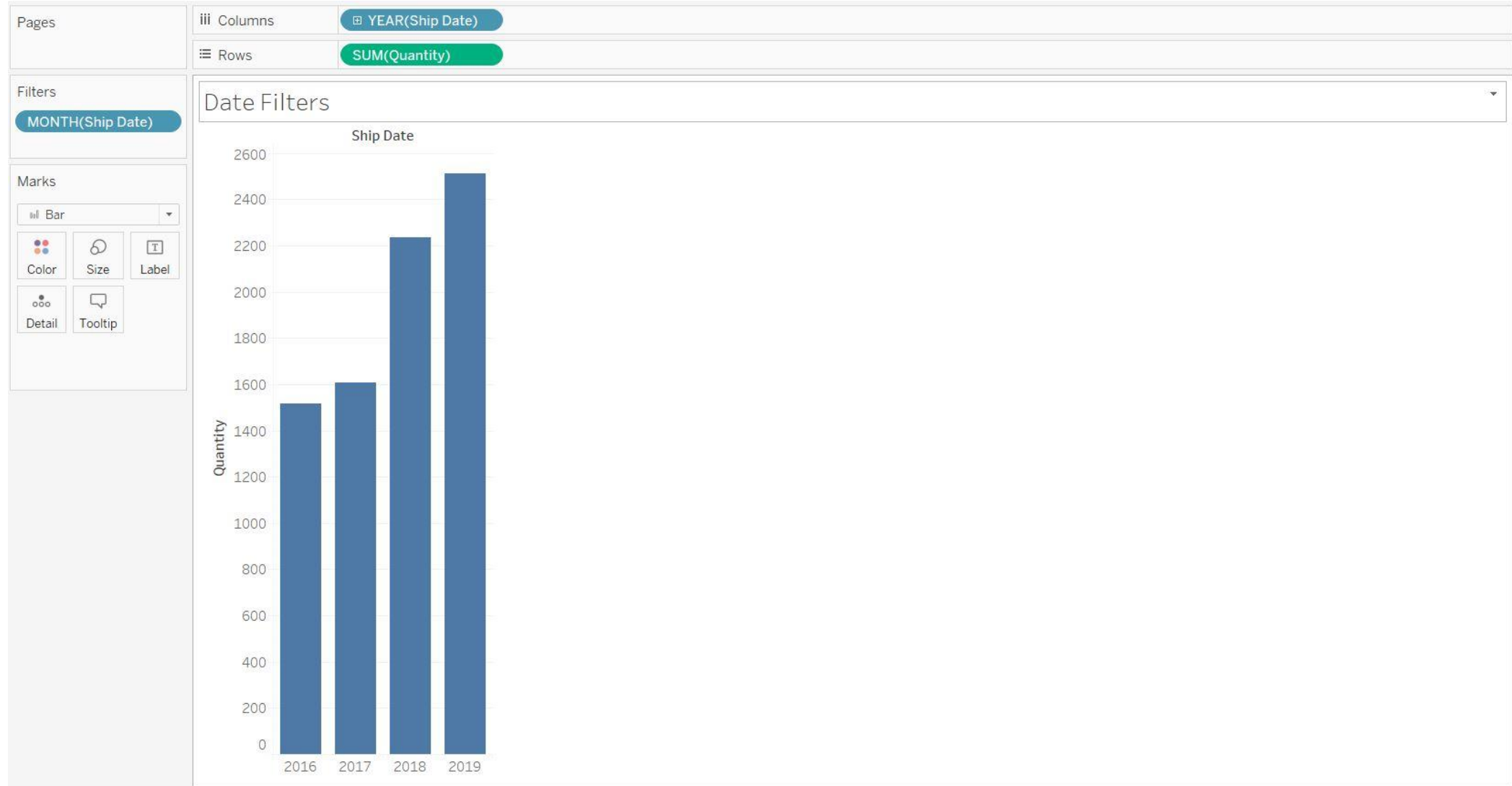
Field: [Month of Ship Date]  
Selection: Selected 3 of 12 values  
Wildcard: All  
Condition: None  
Limit: None

☐ Filter to latest date value when workbook is opened

Reset OK Cancel Apply

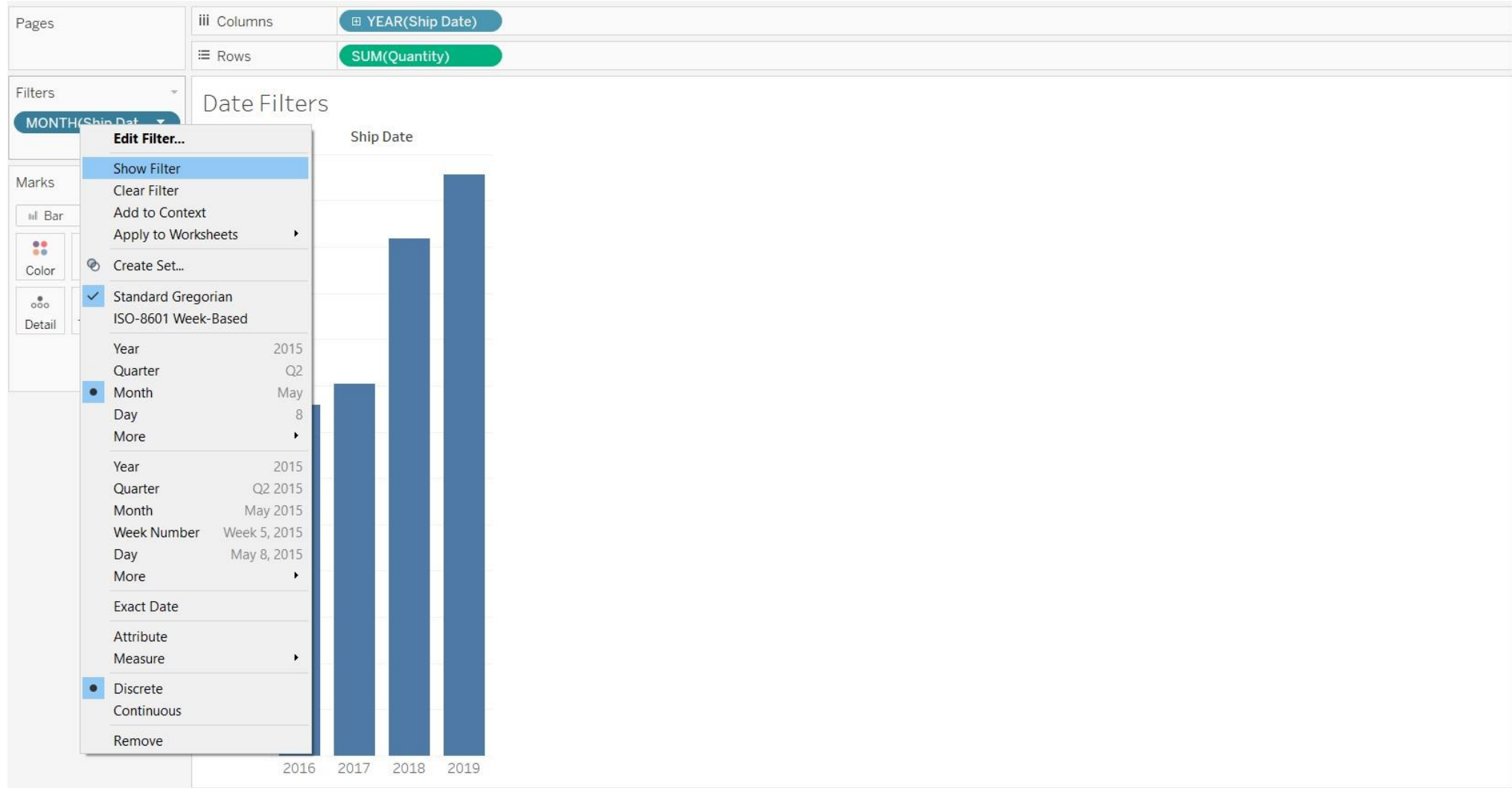
# HOW TO ADD A DATE FILTER

**STEP 19:** The view is updated based on the new Date Filter settings



# HOW TO ADD A DATE FILTER

**STEP 20:** Right-click **MONTH(Ship Date)** in the Filters shelf and select **Show Filter**



# HOW TO ADD A DATE FILTER

**STEP 21: MONTH(Ship Date)** Filter must be visible on Top Right side of the view

