


UI Component: Filters

Status	CPB-2289 - Administer Filters ( Op en)
Components	Resource Planner Cloud

User story

Nadia (Dispatcher) wants to see all technicians which are older than 21 and can speak Spanish.
Example: *Filter a list of human resources => show only resources which are older then 21 and have the skill "Spanish".*

Definitions

Definition: Filter

A filter is a group of conditions logically combined with AND and OR to limit the result set of a list.

Definition: Condition

A condition contains: a property, an operator, and one to many values.

Views

The filter component contains four views.

View: Filter List

The *Filter List* shows a list of available filters. If this view is shown, no filter is applied to the result set.

Possible actions:

- Select an existing filter (=> load view: Filter Detail)
- Create a new filter (=>load empty view: Filter Detail)

View: Choose Detail

The *Filter Detail* shows the filter's name, the applied conditions and how the conditions are logically applied.

Possible actions:

- Change filter name (=>inline edit name)
- Add condition (=> load view: Choose Attribute)
- Edit condition (=> load view: Assign Condition)
- Delete condition (=> delete condition)
- Clone this filter (=> create new condition and add currently available conditions)

View: Choose Attribute

The *Choose Attribute* shows a selection of attributes which can also be searched.

Possible actions:

- Select an attribute (=>load view: Assign Condition)
- Search attributes (properties) (=> filter attributes list according to query)
- Close view (=> load view: Filter Detail)

View: Assign Condition

The *Assign Condition* lets the user edit the condition.

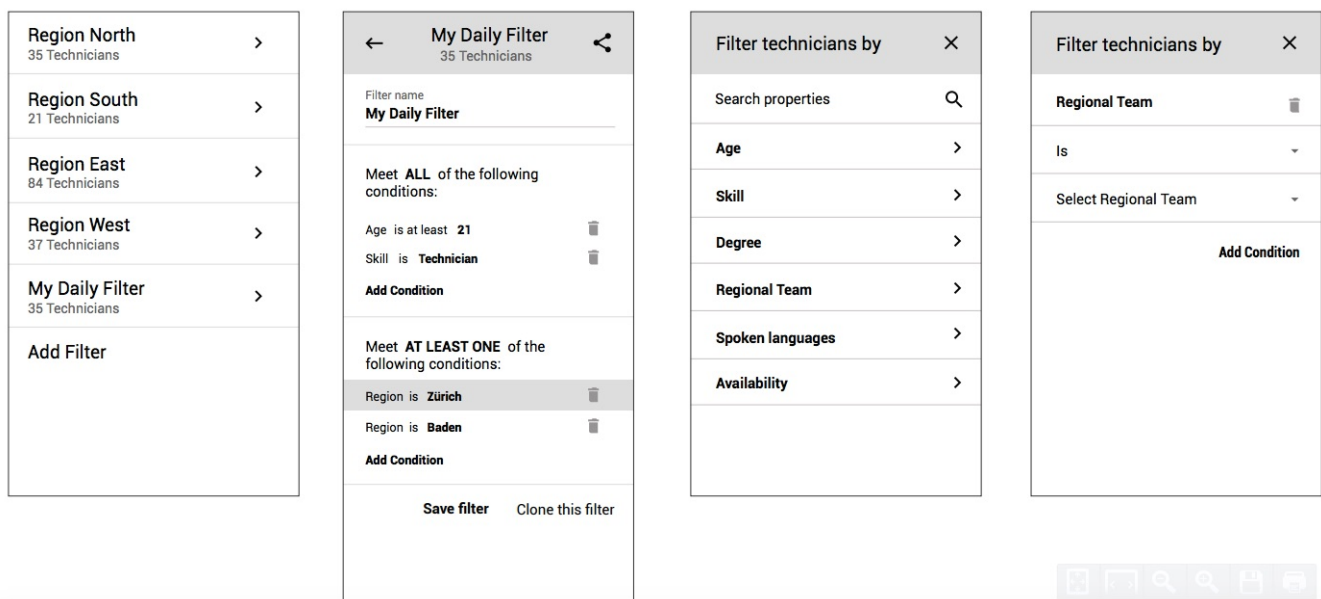
Possible actions:

- Close view (=> load view: Filter Detail)
- Select operator (=> show single selection drop down menu with available condition specific operators)
- Select values (=> show single or multiple selection drop down menu according to condition specific operators)
- Save condition (=> load view: Filter Detail)

Acceptance criteria

- The option to create filters will be available for all new screens
- On the planning screen there will be 2 places to create filters
 - One for the resources above
 - One for the objects to plan (service calls) on the lower part
- Based on the information from where (planning screen, service call screen, business partner screen) the user calls the filter menu we know, which object to filter
- The user is able to define a name of the new filter
- The user is able to define several filter conditions with 2 options
 - Meet all of the following conditions
 - All of those conditions will be combined with AND
 - Meet at least one of the following conditions
 - All of those conditions will be combined with OR (and added to the all conditions in parentheses with AND, e.g. all1 AND all2 AND (one1 OR one2)
- The available fields and operators for each object are defined here [02 Filters](#)

GUI



Sample of the filter usability (hubspot like)

[filterSampleHubspot.tv](#)

Sample of meet all and meet at least one (zendesk like)

[filterSampleZendesk.tv](#)

Open Points

- Not all fields, which have to be available for the filters are confirmed yet
- Not all fields, which have to be available even exist yet
- Not all operators for the fields are confirmed yet (most probably "Contains one of the following" will also be available for other fields)
- Later on you should be able to share filters
- Storage of the filter should be in the cloud because we might want to be able to use it via mobile later on.