# Lab: Filters

Estimated time: 30 minutes

In this lab, you will:

1. Explore default filter queries.
2. Create a starred filter.
3. Explore and create quick filters.
4. Explore existing board filters.
5. Create a board.

> *Note: These instructions assume that you have projects from the previous labs. If you have other projects, you can modify the queries to make them work for your projects.*

## 1: Explore default filter queries.

1. Click on the **Filters** tab. You may need to click the Jira icon in the upper left to see it.

2. Click on each of the tabs/filters to view and execute each query. In JQL search, view the JQL and explore any fields and/or functions that you are not familiar with. Notice that some of the queries can not be displayed with basic search, because the user interface elements don't support the query.

> *Congratulations, you have explored the default filter queries.*

## 2: Create a starred filter.

1. In basic or JQL search, create and execute a query that searches for all issues with a `statusCategory` of `In Progress` that are assigned to the `currentUser()``. (If the search returns no issues, you may want to move an issue to the `In Progress `or` Review `column in` projectA` and assign yourself to the issue.)

   > *Using "statusCategory" in this query instead of "status" has the advantage of including issues in any column where the work is in progress, such as the Review column that you created in the earlier lab. There are only three statusCategories: To Do, In Progress and Done, so this is a very flexible query if teams add columns/statuses to the boards.*

2. Click the **Save as** link to save the query as a filter. Name the filter `My in progress`. After you create the filter, it should show under the **Starred** category in the sidebar. You may need to refresh your browser to see it.

3. In **Filters** click the **View all filters** tab. This tab is at the bottom of the sidebar. You should see your `My in progress` filter in the list of filters.

4. Click on the more (...) icon to the right of your new filter and select **Edit**. View and change any of the metadata details if you would like.

5. Execute the filter by clicking on it. Change the query slightly (for example, swap the order of the fields) and re-save the filter.

6. Experiment with creating other filters.

> *Congratulations, you have created and edited a starred filter.*

## 3: Explore and create quick filters.

1. View your `projectA` company-managed kanban board.
2. Enter some text in the text search box below the board name to show only issues containing that text.
3. Clear the search text and click on your user icon at the top to view only your issues.
4. Click on your user icon to clear the user filter and use the **quick filters** to the right of the user icons to change the issues viewed on the board.
5. Navigate to board settings and view the quick filters for the board (under the **Quick Filters** tab).
6. Add a quick filter named `Stale Issues` that displays non-done issues that have not been updated in the last day. (Hint: `updated < -1d AND statusCategory != Done`). It is a good practice to test your JQL in advanced/JQL search before placing it in a user interface element that expects JQL.
7. Verify that your quick filter is working by navigating back to the board and clicking on `Stale Issues`. You may need to change the query and/or issues' status to see results.
8. Experiment with creating other quick filters.
9. (Optional) View your `projectAteam` team-managed board. You can filter by entering text or clicking on a user's icon. Quick filters (and the features in the rest of this lab) are currently not available for team-managed projects.

> *Congratulations, you have explored and created quick filters.*

## 4: Explore existing board filters.

1. Navigate to the kanban board for `projectA`.
2. In the board's settings, navigate to the **General** tab.
3. Under the **Filter** heading, view the name of the filter used as the board's filter. View the associated **Filter Query**, also under the **Filter** heading.
4. Click **Edit Filter Query**. You will be brought to **Filters** with the board's filter executed. These are the issues that appear on the board.
5. Under **Filters**, scroll down and click **View all filters**. Notice that the board's filter is a standard filter. Also notice that it is not starred. This is because board filters are usually not useful as standalone queries.

> *Congratulations, you have explored existing board filters.*

## 5: Create a board.

1. Create a board's filter using the steps below. This board will be used to show all issues that are in `projectA` or `projectB`.
   - Navigate to **View all filters**.
   - Copy the board's filter for `projectA` by selecting its More icon (...) and selecting **Copy filter**. Name the filter `Projects A and B`. We will use this filter as a starting point for our new

board's filter.
  - Using JQL search, modify and save the query so that it meets the requirements described above. Reuse the `ORDER BY` clause from the board filter for `projectA`. Hint: Here is a query that would work: `project in (projectA, projectB) ORDER BY Rank ASC`.

2. Create a board in your profile:

   - From your `projectA` project, click the **board** dropdown under the project name in the sidebar.
   - Click **Create board**.
   - Click **Create a Kanban board**. (Notice that you could create a new board with sample data. This will create a new project in your account. This is good for looking at reports with more realistic data than what we have seen in this course.)
   - In **Create a board**, select **Board from an existing Saved Filter**. Click **Next**.
   - In **Name this board**, name the board `Projects A and B` and select your `Projects A and B` saved filter. Set the location to your profile (under **Personal**).
   - Click **Create board**. You should see your new board. You can also find the board using the **VIEW ALL** link that you saw when creating the board.

3. View the board's settings and verify that the filter that you created above is being used as the board's filter.

4. Configure the board's columns.

   - Click the **Columns** tab in the board's settings. Notice that the columns of the board are the same names as the three statusCategory values (To Do, In Progress, Done). The statuses in each column are arranged by statusCategory.
   - Notice that multiple statuses are included in a single board column. If you would like, you could create a Review column on the board and move the Review status to that column. You could also do this for other statuses.

5. View your new board and verify that it looks and behaves as expected. You should see issues from both of your projects.

6. Verify that your board is accessible in your profile. Click your user icon and select **Your boards** or **Personal boards**.

7. Change the board's location to the `projectA` project. You can change this under the **General** tab for the board's settings (under **Location**). Verify that `projectA` now has two boards. Use the board switcher dropdown in the upper left to switch between boards.

8. Move your new board back to your user profile.

> *Congratulations, you have created a board containing issues that span multiple projects and completed this lab.*