Business Requirements Document (BRD)

Feature Name: Session-Based Filter Retention

Application: ApWorks

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# 1. Purpose

ApWorks provides multiple screens where users can search for data using filter criteria. Currently, users must reselect filters each time they revisit a screen, leading to inefficiency and redundant effort. This BRD proposes a simplified session-based mechanism that automatically retains a user's filter selections within a session, enhancing usability without saving search criteria.

# 2. Scope

This feature applies to all screens in ApWorks that support filters or search capabilities including System Setup UIs (i.e. user group management, Group Rules, Vendors, Taxes etc) , gadgets and reports. The retained filter state will be session-specific and user-specific, with no cross-session persistence.

Please note that this feature is applicable on Search Text boxes as well where user type in value to search data in grid i.e. on Invoice Management Document.  
  
This document is applicable to all UIs in ApWork which have search/ filter options. The only UIs where we don’t have filters are “Company” and Invoice Main UI. Rest of all UIs will have this feature enabled.

We need to discuss the “no filter” option on dashboard in session with US team.

* This feature will also apply to sorting preferences. The system will retain not only the selected search or filter parameters but also the last applied sorting order (e.g., column and sort direction) on each screen. When the user returns to a screen during the same session, both the filter criteria and the sorting configuration will be automatically restored.

# 3. Functional Requirements

* - The system will automatically retain the user's last selected filters on each screen during an active session.
* - When the user navigates away and returns to the same screen within the same session, the previously applied filters will be restored automatically.
* - Filter state will persist across tabs or subtabs on the same screen, provided they are part of the same session.
* - The feature supports consistent behavior across multiple browser tabs, as long as they share the same session (not incognito or isolated).
* - Filter selections will reset when the session ends due to logout, timeout, or browser closure.
* - No manual save/load actions will be available or required.
* - There will be no UI elements to indicate filter state restoration; the feature operates transparently.
* No database change required.

# 4. Non-Functional Requirements

* - Applicable to all users with access to filter-enabled screens.
* - Filter state will be stored on the client side for the duration of the session.
* - No server-side persistence or database storage is involved.
* - Session timeout behavior will follow existing ApWorks session management rules.

# 5. UI Behavior

* - No additional buttons or user actions are required.
* - Previously selected filters will be automatically restored when a user returns to a screen during the same session.
* - No visual indication will be shown to confirm that filters have been restored.

# 6. Permissions

All users with access to filter-enabled screens will automatically benefit from this feature. No additional permissions are required.

# 7. Technical Notes

* - Filter state should be retained using client-side mechanisms, such as session storage or in-memory objects based on the frontend framework.
* - No server calls are needed for storing or retrieving session filter state.
* - Behavior must be consistent across tabs that share the same session context.

# 8. Risks and Mitigation

# 9. Out of Scope

* - Saving filters to the database.
* - Allowing users to name or manage multiple saved search criteria.
* - Setting default filters.
* - Exporting, importing, or sharing filters.

# 10. Appendix

* - Example: If a user applies filters on the 'Vendor Invoices' screen, navigates to another module, and then returns to 'Vendor Invoices' within the same session, the previously applied filters will be restored.
* - If the user logs out or the session times out, the filters will be cleared and the screen will reset to its default state.
* - This behavior also applies if the user opens another tab in the same browser session (non-incognito).
* - If the user opens the application in a new browser window or incognito mode, filter state will not be retained.

# 8. Risks and Mitigation

|  |  |
| --- | --- |
| Risk | Mitigation |
| User expects filter state to persist across sessions | Clarify in documentation or training that the feature is session-based only. |
| Unexpected browser closures lead to lost state | Educate users that filters will be lost after session timeout or logout. |
| Opening in a new session (e.g., incognito) resets filters | Clarify that filter retention only applies within the same session context. |

# 8. Open Questions:

1) We need to discuss the “no filter” option on dashboard in session with US team.

Answer: [Asim Jamil]As per the discussion with the US team, the system **should not retain the selected value** in the **date range dropdown** (used to filter data by week ranges such as 9 weeks, 24 weeks, etc.) **unless the user has entered a value in the search text field**.

This approach ensures that filters are only persisted when the user is performing a targeted search, reducing unnecessary default filtering in future sessions.

#### **Example:**

* ✅ If a user selects **"24 weeks"** in the date dropdown **and** types **"ABC Media"** into the search field → both filters will be retained in the next session.
* ❌ If a user selects **"9 weeks"** but **leaves the search field empty** → the date filter will **not** be saved for the next session.

Furthermore, a visual indicator should be added to show when results are loaded based on a saved search, helping users distinguish filtered views from the default.

Suggestion: Show a small info banner or tag with text like:

“Showing results from your last search”  
 Include a quick “Clear” option to reset filters.

We can discuss and address this indicator when we have the feature ready.

2) Do we need to keep separate session for each company?

[Asim Jamil]: same session across company.

**Subject:** Review Points in Tuesday Meeting

Points:

* Remove Toast message and highlight field where filter is being retained.
* Dashboard:
  + No need to retain full view mode,
  + User will land on dashboard in normal dashboard view even there is no filter applied on any gadget, system will switch the gadget view to full view mode when user change the searched text.
* Invoice View:
  + Keep the following fields in first column on the UI and in the same order mentioned below.
    - Net Amount
    - Tax Amount (Rename Tax Total to Tax Amount)
    - Invoice Total.