Organize Ad hoc filters using folders

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Path: Reporting > Ad Hoc Reporting > Filter Designer

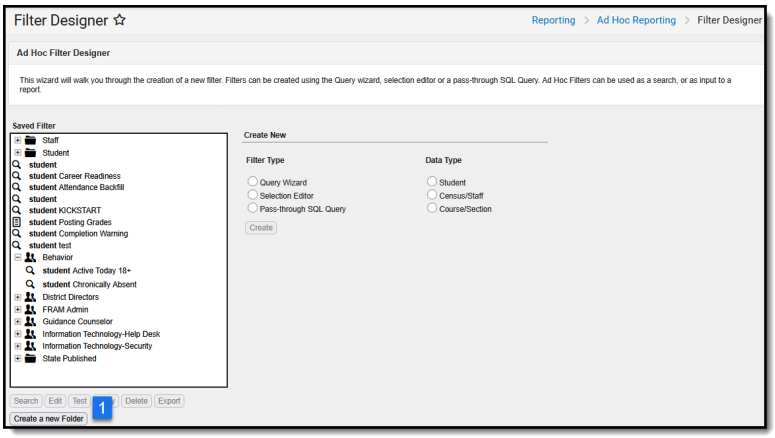
Folders help organize and manage Ad hoc filters within the Filter Designer. You can create folders and subfolders, save filters to folders, and move existing filters between folders to keep related filters grouped together. This guide explains how to organize Ad hoc filters using folders.

Before you start

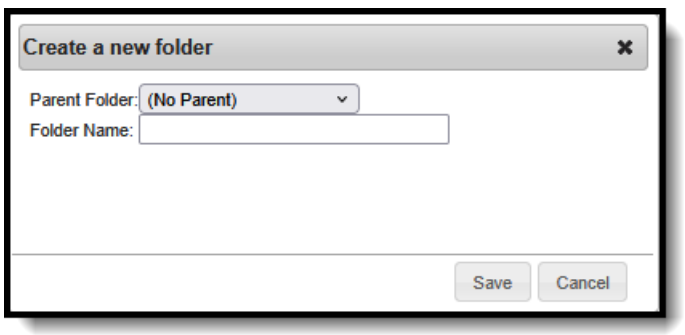
- Folders are available within the Filter Designer tool.
- Folders can be organized in a hierarchy, allowing you to create subfolders within parent folders.
- Filters can be saved to folders associated with a User Account.
- Set appropriate tool rights for Filter Designer.

Create a folder

Create folders to organize related Ad hoc filters.



1. Select **Create a New Folder** (1).
2. Determine whether the folder should be a top-level folder or a subfolder:



   - To create a top-level folder, leave **Parent Folder** set to **(No Parent)**.
   - To create a subfolder, select an existing folder from the **Parent Folder** list. Indentation in the list indicates the folder hierarchy.

3. Enter a **Folder Name**.
4. Select **Save**.

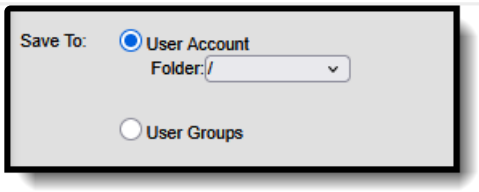
Impact

The folder appears in the **Saved Filters** area and is available for storing Ad hoc filters. If a parent folder was selected, the new folder is created within that folder.

Save a filter to a folder

Save a new or edited filter directly to a folder.

1. Create a new filter or select an existing filter and click Edit.



Use these options to choose the location where an ad hoc filter is saved and shared

2. In the **Save To** area, select **User Account**.
3. Select the desired folder from the **Folder** field.
4. Click **Save**.

Impact

The filter is stored in the selected folder and is accessible from that location in the **Saved Filters** list.

Move a filter to a different folder

Move existing filters to another folder for better organization.

1. Locate the filter in the **Saved Filters** area.
2. Click and hold the filter.
3. Drag the filter to the desired folder.
4. Select **OK** when prompted to confirm the move.

Impact

The filter is moved to the selected folder. Filters can be moved into, out of, or between folders as needed.

What's next

- Create additional folders and subfolders to organize filters by department, report type, or

business process.

- Copy a filter before making significant changes to preserve the original version. Copied filters are named *Copy of [Original Filter Name]*.
- Edit existing filters to update fields, operators, or reporting requirements.
- Test saved filters to verify results before using them in reports or exports

Troubleshooting

- If a folder does not appear in the **Parent Folder** list, verify it has already been created and saved.
- If a filter is not visible in the expected location, verify it was saved to the correct folder or moved successfully.
- If a saved filter displays in red, it contains deprecated fields and should be updated before use.