# Linked Dashboard Filters

When you create and share a Dashboard, your users may want to filter the visualizations on the Dashboard, to only see data that is relevant to their role. The head of customer experience in the North America region may only want to see the data on customers in North America, in a Dashboard that represents global customer data. However, the Dashboard may be built on multiple Datasets: Sales and NPS, for example. To create one filter that filters both visualizations built on the Sales Worksheet, and the visualizations built on the NPS Worksheet, you can link the Worksheet columns, at the Dashboard level.

To filter Dashboards based on one Worksheet, see Dashboard filters.

## Configure linked filters

To configure linked Dashboard filters, follow these steps. Note that you can link the Worksheet columns at the Dashboard level ***without*** actually filtering the Dashboard. This is useful if you would like your users to be able to choose their own filters for the Dashboard.

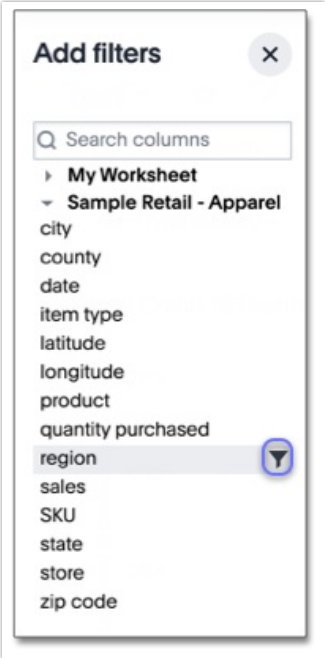
> When you create linked Dashboard filters, you link Worksheet columns at the Dashboard level. You do not globally link the Worksheet columns. You must create linked filters separately, for each Dashboard.

1. Navigate to the Dashboard you would like to filter, or create a new dashboard.

2. Select the **Edit** button at the upper right of the Dashboard. If this button is grayed out, you do not have edit privileges for the Dashboard. To resolve this, contact your administrator or the creator of the Dashboard.

3. In the top menu bar, select **Add filter**. If you already created the filter you would like to link, select it in the filters bar below the Dashboard name, and proceed to step 5.

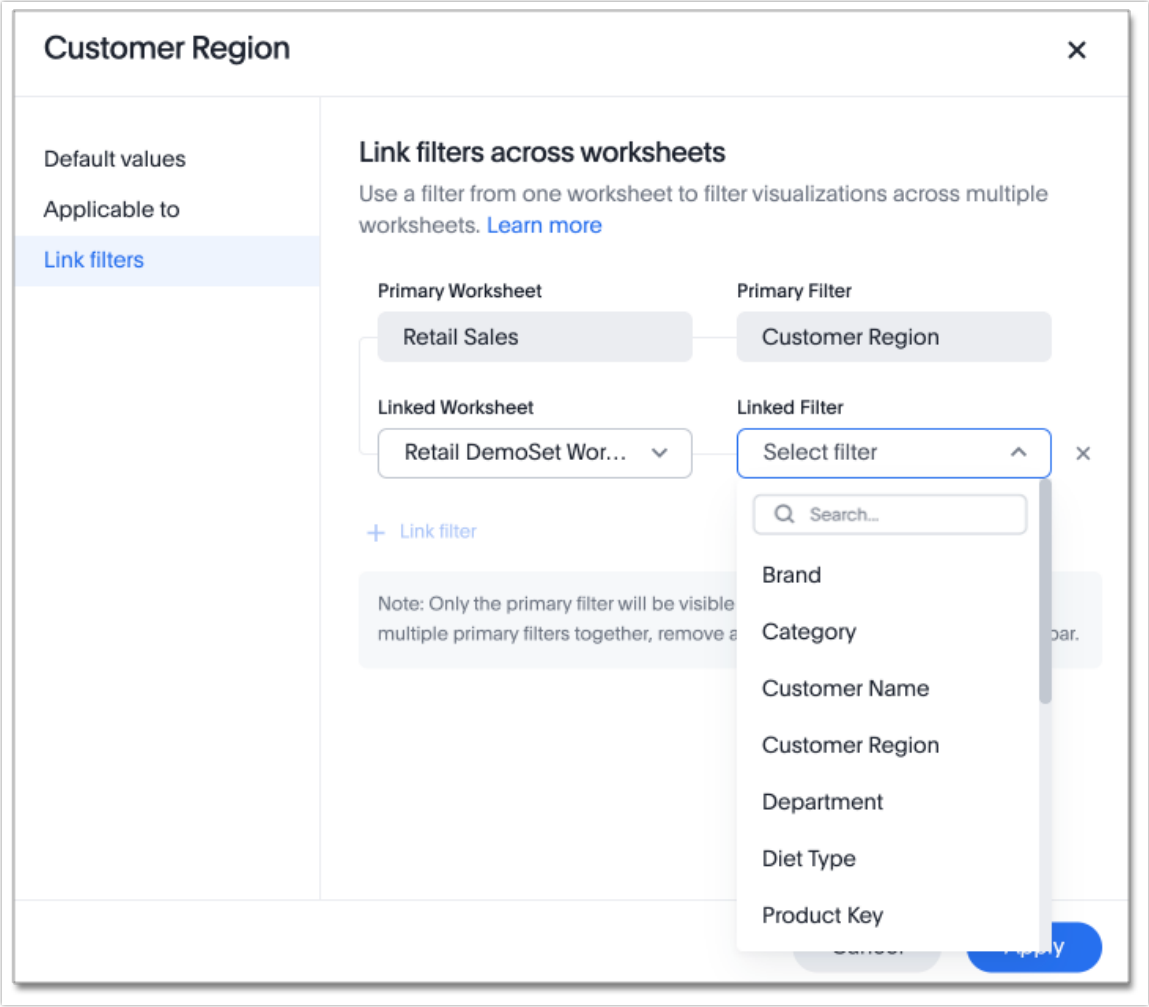
4. In the **Add filters** side panel, select the **Filter** icon next to the column you would like to filter on. In this example, we will create a linked **Customer Region** filter.




5. The Filters modal appears. Select **Link filters** from the left side navigation bar.

6. The **Primary Worksheet** and **Primary filter** text boxes contain the Worksheet and column that the Dashboard is already filtering on. To link the **Customer region** filter across Datasets, we must specify the **Linked Worksheet** and **Linked filter**. Select the **Linked Worksheet** dropdown menu, and choose the Worksheet that contains the column you would like to filter on. In this case, the Dashboard only uses one other Worksheet: **Retail DemoSet Worksheet**.

7. After you click the **Linked Worksheet**, you can select the column to filter on. Use the search box in the dropdown menu to find the column you need. In this case, we are filtering on **Customer region**.




8. To link another Worksheet's **Customer region** column to this filter, select **+ Link filter**. In this case, the Dashboard only uses two Datasets, so the **+ Link filter** option is unavailable.

9. To specify visualizations or tabs to apply the filter to, select **Applicable to** in the left side menu. You can select or deselect entire tabs, or only choose certain visualizations. You can specify which visualizations or tabs a filter should apply to, even if it is not a multi-Worksheet linked filter.

10. To create a linked filter without actually filtering the Dashboard, select **Apply** after you link the columns, instead of specifying values to include or exclude.

11. Optionally, select **Default values**, and specify values to include or exclude.

12. Select **Apply**.

## Limitations of linked filters

- Alchemer Dashboard expects the Worksheet columns you link to have the same column values. You can only use the values of the Primary Filter to filter the Dashboard visualizations, so if the value names are different in the Linked Filter, you are unable to filter visualizations

based on the Linked Worksheet.

For example, in the configuration example, *Retail Sales* is the Primary Worksheet, and the **Customer Region** column from that Worksheet is the Primary Filter. One of the customer regions in *Retail Sales* might be **North America**, but the name of that customer in the Linked Worksheet, *Retail DemoSet Worksheet*, might be **NA**. If you filter based on **North America**, Alchemer Dashboard filters only the visualizations based on the Primary Worksheet.

- You can't link a column to multiple columns in the same worksheet.
- The filters you create can only be linked to the same data types; you can't link a DATE column to a DATETIME column.

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