Customization Bug

This document describes a known problem with saved customizations.
FDW customizations can steadfastly override your filters, even after you explicitly define a filter to be different.
This document describes the problem, how to address it, and a list of some examples.
It also has some information about the "Reset Filters" button, customizations, and how to fix an existing customization that has this problem.

Description of the Problem

FDW may not apply report filter definitions. Even after you click the "Apply Filters" button.
It occurs when using applied customizations, and includes default customizations that are applied automatically when you start a dashboard.
The customization can override what we explicitly tell the report to do. It can create a situation where we tell the report to do one thing, but it does something different for no apparent reason.

This problem is related to customizations, but I still recommend that we use customizations.
Customizations are the biggest strength of FDW. This bug occurs infrequently, not every time we use a customization.
I feel that the usefulness of customizations is greater than the risk of this bug.
See the section below [Customizations that Contain this Bug can be Fixed](#)

The extent that this problem is tied to customizations is demonstrated by the example below:
1. Apply a saved customization
2. Modify some filters.
3. Click "Apply Filters" - the report **fails** to use the filters
4. Click "Reset Filters"
5. Manually re-enter all filters
6. Click "Apply Filters" - the report **works**
7. Re-Apply the initial saved customization
8. Click "Apply Filters" - the report **fails**
9. Click "Reset Filters"
10. Manually re-enter all filters
11. Click "Apply Filters" - the report **works**

The insidious feature of this bug is that it will give no indication that it is happening.
Users must know that this bug exists and proactively check reports to look for signs of a problem.

We should not expect this FDW problem to be resolved in the near future. While the Chancellor's Office acknowledges the problem, they have not committed to addressing it as of this date.

How to Address the Problem

The solution is:
1. Abandon the customization
2. Click the "[Reset Filters](#)" button.
3. Manually re-enter everything.
4. Click the "Apply Filters" button.

You may replace Step 2 with the "Clear My Customization" command. The steps to get to "Clear My Customization" are illustrated in the [Customization](#) section below.

Examples of the Problem

Here are some examples of the problem:

- A report had a department specified in the department filter. However, FDW did not apply that filter in the report results.
  The original report (that did not recognize the filter) was generated using a customization.
  The fix was to click the "Reset Filters" button and then manually re-enter all filters. No customization was applied.
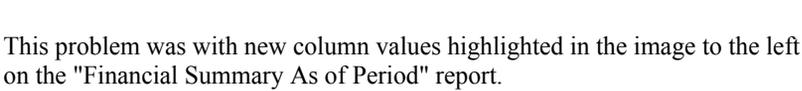
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  This problem was with new column values highlighted in the image to the left
  on the "Financial Summary As of Period" report.
  (These new column values were delivered in August of 2017.)

  The report was run with the customization defined as the dashboard default.
  So, although no customization was explicitly requested, the dashboard default was applied.
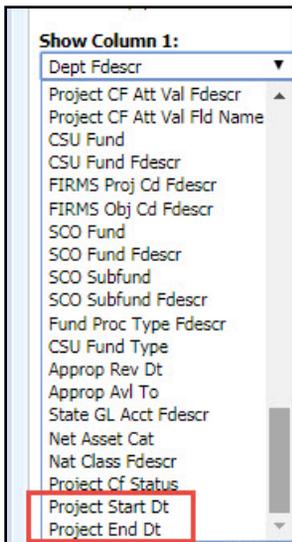
The new column values were not available in the drop-down list as they should have been.

We clicked "Reset Filters" and manually re-entered all filters.
Then, the new column values appeared in the drop-down list - issue fixed.

The "Reset Filters" Button

The "Reset Filters" button will clear out any filter values, and is on most FDW reports. It can provide a reset that is almost equal to logging out of FDW and shutting down your browser and then starting all over, but with less impact. It is located at the bottom of the "Report Filters" section next to the "Apply Filters" button.

Here is the "Reset Filters" button on the Financial Summary As of Period report:
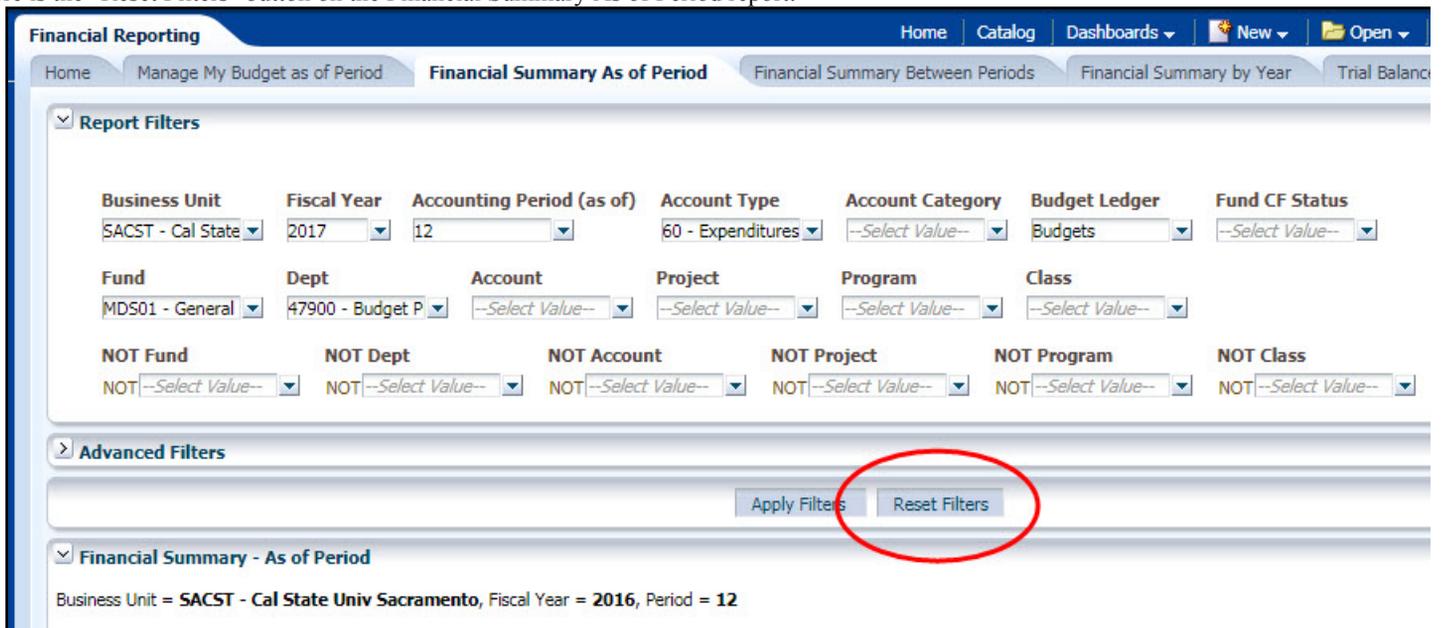
Customizations

Customizations are managed by:
1. Left-Clicking on the three lines (also called the "hamburger") at the top-right of the window.
2. Then, the customization functions are revealed.
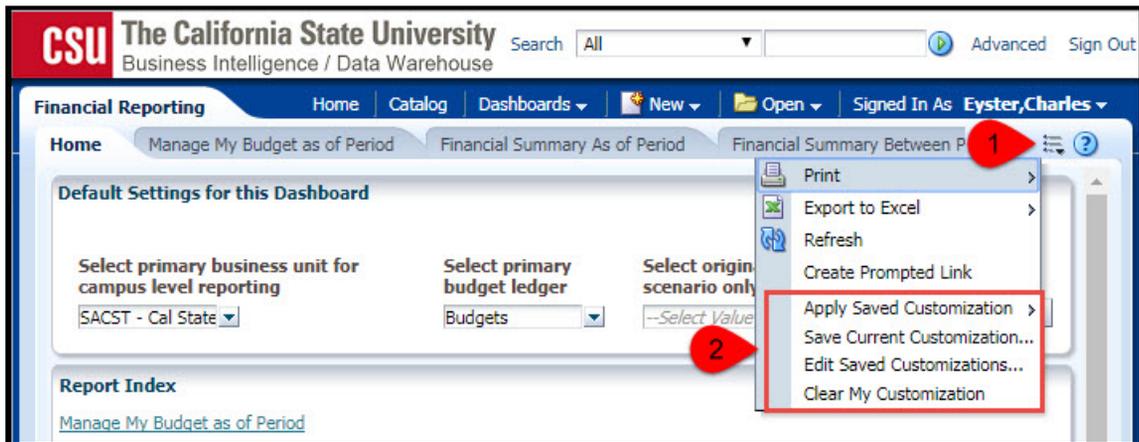
Customizations that Contain this Bug can be Fixed

If you have a customization that you want, but it causes this bug, it can be fixed/replaced. Do not give up on it!
This is what you can do:

1. Run your customization (even though it has a problem).
2. Make a screen-shot of the report. Make sure to include the description of the report filters at the bottom of the report.
3. Click "Reset Filters".
4. Manually re-enter all filters, column settings, etc. Use the screen-shot taken in Step 2 as a guide.
   Do **not** apply any customization.
5. Click "Apply Filters".
6. Test and verify your report.
7. Save this report as a new customization.
8. Delete the old customization that has the problem.

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