

## How to Add a Query Filter

Query filters limit the data retrieved from the data source and returned to the document. They allow you to retrieve only the data that you need to answer a specific business question and minimize the quantity of data returned to the document to optimize performance. There are two ways of creating query filters.

- Quick Filter Quick Filters allow you to quickly define the values that you want to retrieve for a specific result object without launching the Filter Editor. By default, Quick Filters use the Equal to operator if you select a single value or the In List operator if you select multiple values.
- **Custom Filter** You create custom query filters to limit document data to information corresponding to a specific business question or the business information needs of a specific group of users. Usually they would involve more than one object and launch the **Filter Editor**.

Filtering procedures are very similar in HTML and Applet modes so we will not differentiate here. You must however be in **Design** mode to create and edit the query filters.

Step-by-Step Instructions:	HINTS
Open the <b>Web Intelligence</b> document and report and switch to <b>Design</b> mode.	If your <b>Preferences</b> list <b>Applet</b> , you can be in <b>Design</b> or <b>Data</b> mode to edit.
Click either <b>Edit Data Provider</b> icon and the <b>Query Panel</b> displays.	One icon is located in the Document toolbar and the other is found under the Data Access tab > Data Providers subtab.
<ul> <li><u>QUICK FILTER:</u></li> <li>Highlight the <b>Object</b> that you want filtered and then click on the <b>Add Quick Filter</b> icon.</li> </ul>	<ul> <li>The Add Quick Filter box displays</li> <li>See Figures 1 &amp; 2.</li> <li>NOTE: If you click on an object and the Quick Filter icon remains greyed out, it is because that particular object does NOT have a list of values defined. You will have to use a Custom Filter.</li> </ul>
<ul> <li>Select the required value(s) and click OK.</li> </ul>	<ul> <li>By default, Quick Filter uses the Equal to operator if you select a single value or the In List operator if you select multiple values.</li> <li>The new query filter is added to the Query Filters pane. (Figure 3)</li> </ul>
<ul> <li>CUSTOM FILTER:</li> <li>Drag and drop the Object that you want filtered to the Query</li> </ul>	See Figure 4.



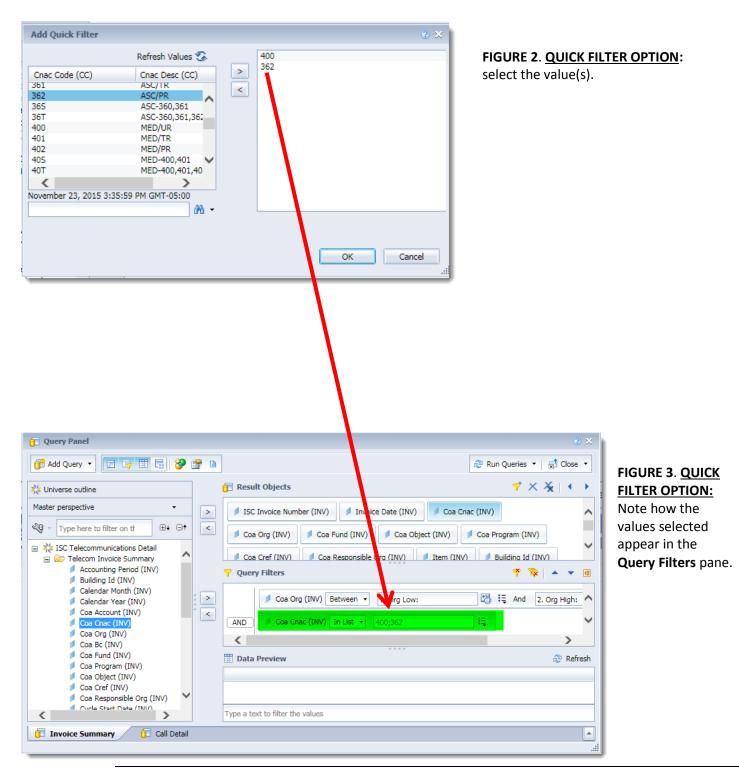
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Filters pane.	
<ul> <li>Click the arrow next to the default operator (In List) and select a query operator from the list.</li> </ul>	It makes most sense to use this option when your operator is NOT In List or Equal to, which are the defaults in Quick Filters! (Figure 5)
<ul> <li>Click the arrow next to the query filter to Define Filter Type.</li> </ul>	<ul> <li>Filter types include Constant, Value(s) from list, Prompt, Object from this query, and Result from another query. (Figure 6)</li> <li>Note that if you select Prompt, another small icon appears and you can set the properties of the prompt. Likewise, other selections offer the chance at further customization.</li> </ul>

#### FIGURE 1. QUICK FILTER OPTION: Select the appropriate Object and then click the Add Quick Filter icon.

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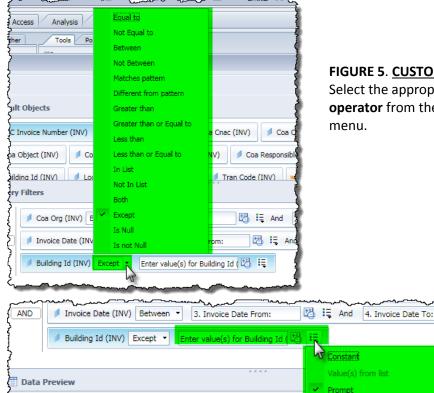




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III Data Preview 🕅 😂 Refr	esh

FIGURE 4. CUSTOM FILTER: Select the appropriate **Object** and drag it to the Query Filter pane directly.



### FIGURE 5. CUSTOM FILTER:

Object from this query Result from another

Select the appropriate operator from the drop-down

**FIGURE 6. CUSTOM FILTER:** 

Select the appropriate filter type from the drop-down menu.