

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 Web Intelligence document and report and switch to Design mode.	If your Preferences list Applet , you can be in Design or Data mode to edit.
Click either Edit Data Provider icon and the Query Panel displays.	One icon is located in the Document toolbar and the other is found under the Data Access tab > Data Providers subtab.
 <u>QUICK FILTER:</u> Highlight the Object that you want filtered and then click on the Add Quick Filter icon. 	 The Add Quick Filter box displays See Figures 1 & 2. 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.
 Select the required value(s) and click OK. 	 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. The new query filter is added to the Query Filters pane. (Figure 3)
 CUSTOM FILTER: Drag and drop the Object that you want filtered to the Query 	See Figure 4.



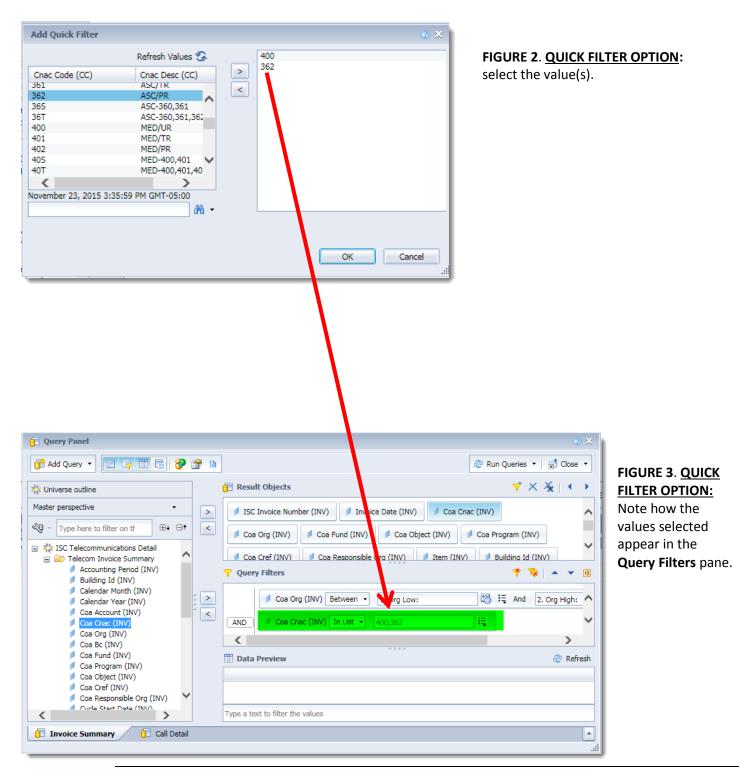
How to Add a Query Filter

Filters pane.	
 Click the arrow next to the default operator (In List) and select a query operator from the list. 	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)
 Click the arrow next to the query filter to Define Filter Type. 	 Filter types include Constant, Value(s) from list, Prompt, Object from this query, and Result from another query. (Figure 6) 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.

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

🔁 Query Panel		2 ×
🔂 Add Query 🔹 🖬 🐺	📰 🖫 🛞 😁 🖻	S Close
🔆 Universe outline		%
	S ISC Invoice Number (IBD)	dd Quick Filter
ISC Billing Detail ISC Billing Detail	Coa Fund (IBD) Coa Object (IBD) Coa Program (IBD) Coa Cref (IBD)	~
Accounting	Y Query Filters Y 🖗	· · ·
Calendar Mc Calendar Ye Coa Accoun	OR Coa Org (IBD) Between 🔹 1. Enter ORG Iow: 🔀 🗄 And 2. Enter O	
COA PC (IPC	AND ▲ AND ▲ AND ▲ ACcounting Period (IBD) Equal to ▼ Enter Accounting Period (whet IB)	2. Enter ORG
Coa Object	Service Id (IBD) Not Equal to BACKITUP	
Coa Cref (IE Coa Respon Cycle End D		
Cycle Start Desc1 (IBD)	<	>
Desc2 (IBD) Desc3 (IBD)	Data Preview	🔁 Refresh
Desc4 (IBD) Fiscal Month		
<	Type a text to filter the values	
15CBill		







How to Add a Query Filter

🖥 Result Objects 🦞 🗙 🙀 📢	•
JISC Invoice Number (INV) Invoice Date (INV) Coa Cnac (INV) Coa Org (INV)	^
Coa Object (INV) Coa Program (INV) Coa Cref (INV) Coa Responsible Org (INV)	
Building Id (INV) Location (INV) Desc1 (INV) Tran Code (INV) SUM Transaction Amount (INV)	
Cycle : tart Date (INV) Cycle End Date (INV) Fiscal Year (INV) Fiscal Month Seq (INV)	
Accourting Period (INV) Start Bill Date (INV) Stop Bill Date (INV)	~
Y Query Fiters Y 🔯 🔺 💌	
Coa Org (INV) Between 👻 1. Org Low: 🔀 🗮 And 2. Org High: 🔀 🗮	
AND VInvoice Date (INV) Between - 3. Invoice Date From: 🖄 🗄 And 4. Invoice Date To: 🖄 🗮	
Building Id (INV) In List Type a constant	
III Data Preview 🕅 😂 Refr	esh

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

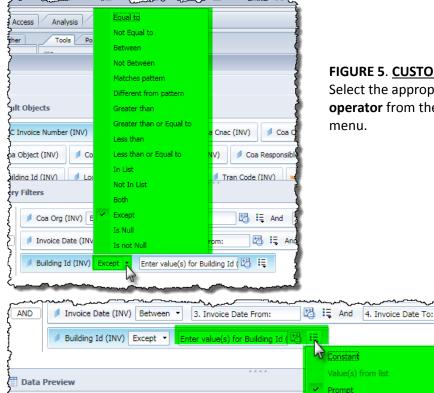


FIGURE 5. CUSTOM FILTER:

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.