**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:

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<th>Step</th>
<th>Instructions</th>
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<td>1.</td>
<td>Open the Web Intelligence document and report and switch to Design mode.</td>
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<tr>
<td>2.</td>
<td>Click either Edit Data Provider icon and the Query Panel displays.</td>
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### HINTS

- If your Preferences list Applet, you can be in Design or Data mode to edit.
- One icon is located in the Document toolbar and the other is found under the Data Access tab > Data Providers subtab.

#### QUICK FILTER:

- Highlight the Object that you want filtered and then click on the Add Quick Filter icon.
- Select the required value(s) and click OK.
- 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.
- 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.
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<table>
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<tr>
<th>Filters pane.</th>
<th>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)</th>
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<tr>
<td>• Click the arrow next to the default operator (In List) and select a query operator from the list.</td>
<td>• Filter types include Constant, Value(s) from list, Prompt, Object from this query, and Result from another query. (Figure 6)</td>
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<td>• Click the arrow next to the query filter to Define Filter Type.</td>
<td>• 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.</td>
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You can learn how to do increasingly complicated query filters by reading the FAQ section on queries.

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**FIGURE 1. QUICK FILTER OPTION:** Select the appropriate **Object** and then click the **Add Quick Filter** icon.
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FIGURE 2. QUICK FILTER OPTION: select the value(s).

FIGURE 3. QUICK FILTER OPTION: Note how the values selected appear in the Query Filters pane.
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**FIGURE 4. CUSTOM FILTER:** Select the appropriate Object and drag it to the Query Filter pane directly.

**FIGURE 5. CUSTOM FILTER:** Select the appropriate operator from the drop-down menu.

**FIGURE 6. CUSTOM FILTER:** Select the appropriate filter type from the drop-down menu.