



PeopleSoft Data Dictionary EPM: Advanced Filter

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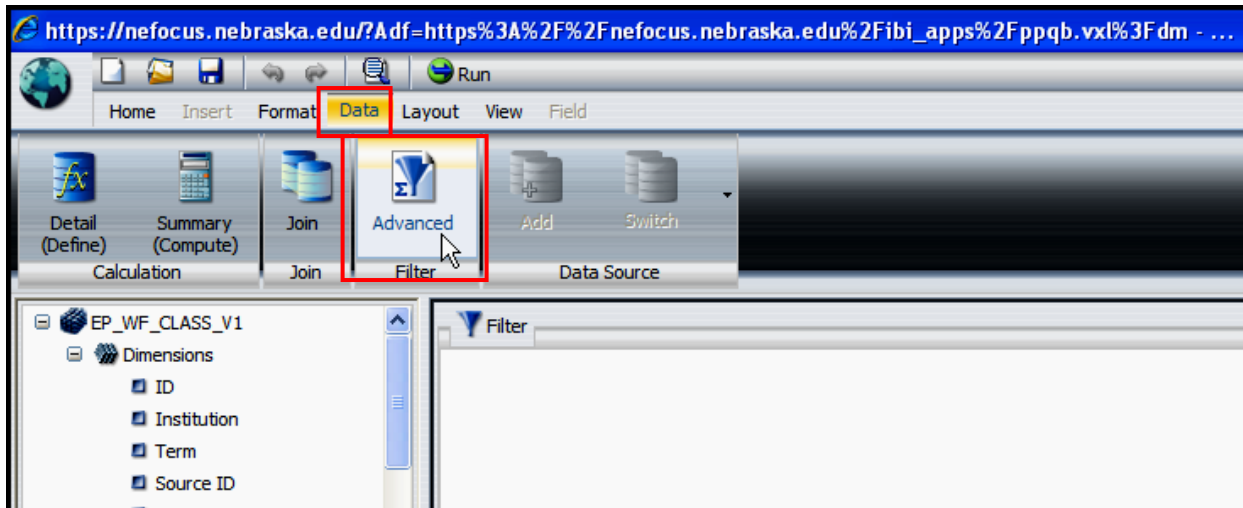
EPM Query Instructions – Advanced Filter

Advanced Filter:

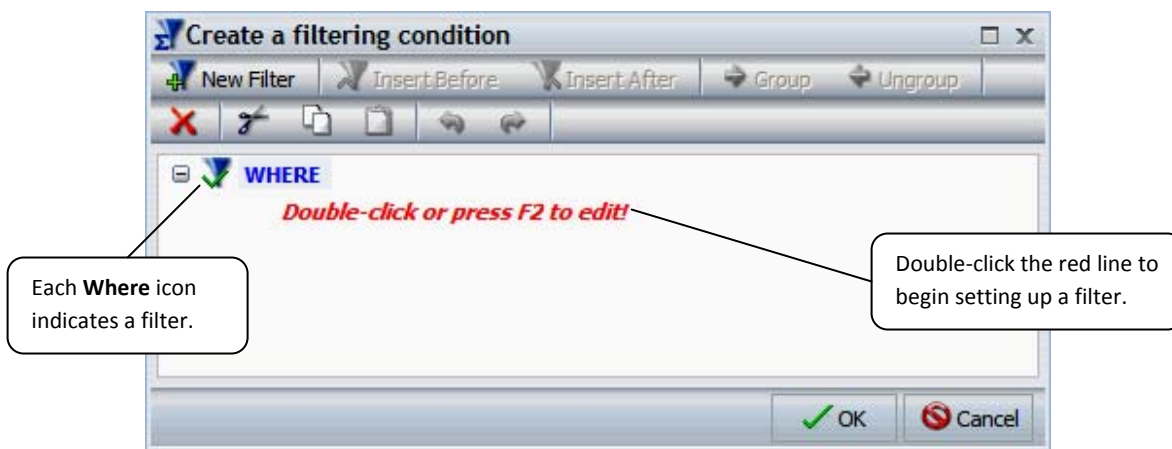
When it comes to setting and selecting a filter for your query, there are two types: Simple Filter, and Advanced Filter. This document will highlight the key points of utilizing the **Advanced Filter** tool. (For information on the Simple Filter, see the “Simple Filter” document.) To begin setting up a new Advanced Filter, you must first launch the Advanced Filter tool.

Launch the Advanced Filter Tool:

To launch the Advanced Filter tool, click on **Data** in the control panel and select the **Advanced** icon.



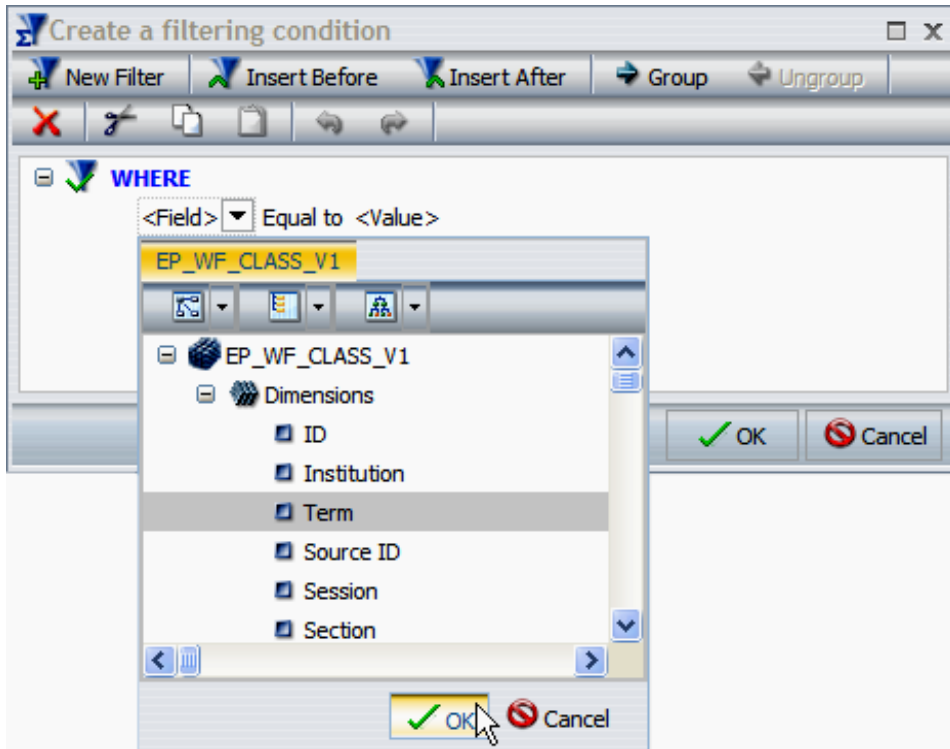
The Advanced Filter tool will initially look something like this:



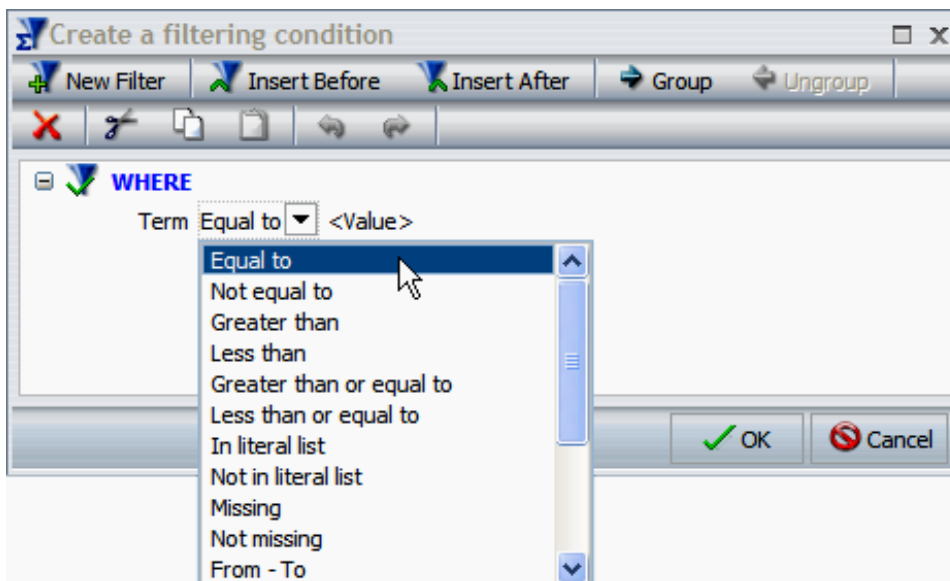
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Setting up an Advanced Filter:

An Advanced Filter is essentially a collection of all Filters within the query, each with three main components: the Field, the Operand, and the Value(s). Double-clicking on the red line will open up a selection screen for you to choose the field you want to filter.



Then by clicking on the **Equal to** drop-down box, you can select or confirm your operand.



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You can select values by clicking **<Value>**, which will open up a screen that functions similarly to the Simple Filter tool. In this example, Term codes are being added as values to be filtered for.

The screenshot shows the 'Create a filtering condition' dialog box. The 'WHERE' section is set to 'Term Equal to <Value>'. A dropdown menu is open, showing 'Constant' selected, with 'Parameter' and 'Field' as other options. The 'Value' field contains '1115'. A 'Get Values' button is circled in red. The right side of the dialog shows a list of values: '1108' and '1111'. The 'OK' button is highlighted with a green checkmark.

There are 3 types of value options: **Constant, Parameter, and Field.** This example is using **Constant**.

1. Type each value one-at-a-time in this box.

Don't use "Get Values".

2. To set each value, you must click the arrow button.

3. You must click **OK** to confirm your values.

After clicking **OK**, this example would look like this in the Advanced Filter tool:

The screenshot shows the 'Create a filtering condition' dialog box after clicking 'OK'. The 'WHERE' section is set to 'Term Equal to 1108;1111;1115'. The dialog box is annotated with three boxes: 'Field' pointing to 'Term', 'Operand' pointing to 'Equal to', and 'Values' pointing to '1108;1111;1115'. The 'OK' button is highlighted with a green checkmark.

Field

Operand

Values

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Value Type Options:

There are three types of value options to select from when determining your Advanced Filter values:

1. Constant:

As seen in the previous example, **Constant** allows you to hard-code in a value. In other words, the filter will always use the value(s) you entered unless you go in and change them. You are able to type in each value in the box on the left, and to set, click the right arrow button near the center of the screen. Because it draws from the database and takes much time to process, it is suggested that you not use the “Get Values” function.

2. Parameter:

Parameter is similar to the Prompt function (Seen in “Simple Filter”) where you can set the filter to ask the user to determine the values each time the query is run. Below, there are three options: **Simple**, **Static**, and **Dynamic**. Like with Prompt, **Simple** will allow a dashboard user to type in a value, **Static** will force the user to choose between values you set, and **Dynamic** will draw from the database and is not the preferred setting.

The Field name of the field you chose to filter.

Type in text you want user to see when prompted.

Click OK to set.

For a **Static** Parameter, you can create a list of values for the user to choose from. Check this box to allow a user to select multiple values.

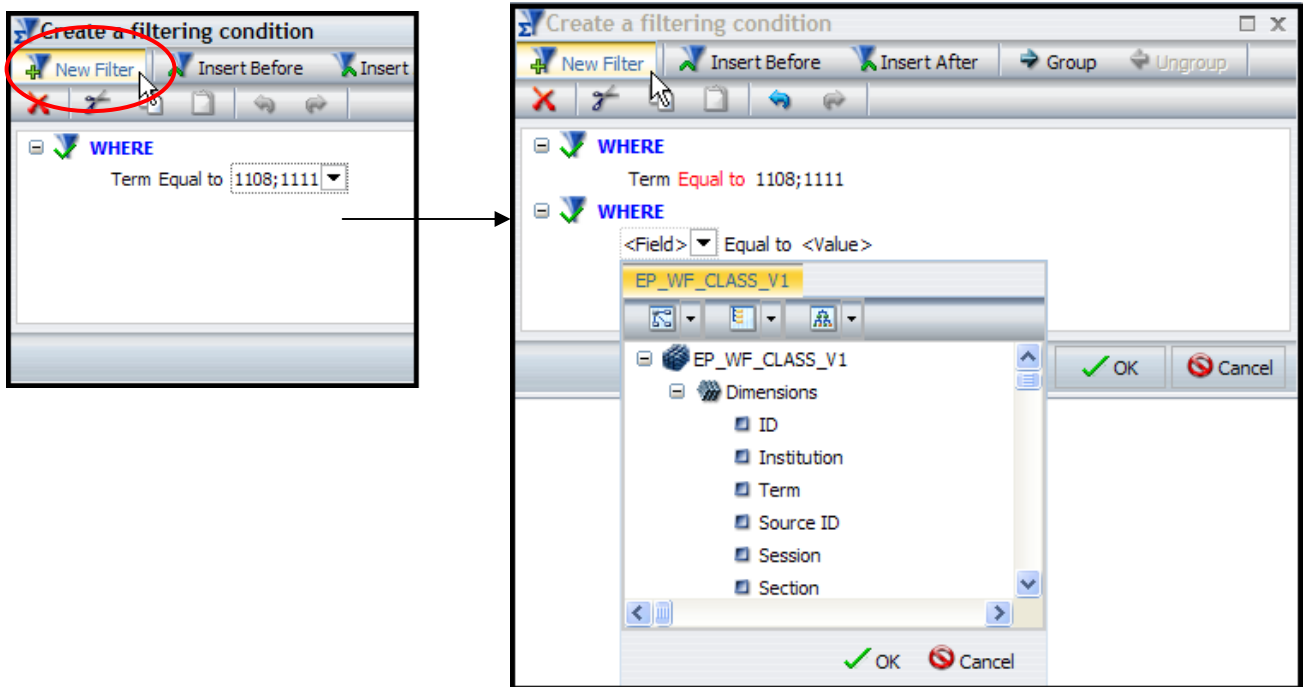
3. Field:

The **Field** value type allows you to compare one field to another. This may not be a desired function for many queries, so this document will not detail this function any further.

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Adding Filters:

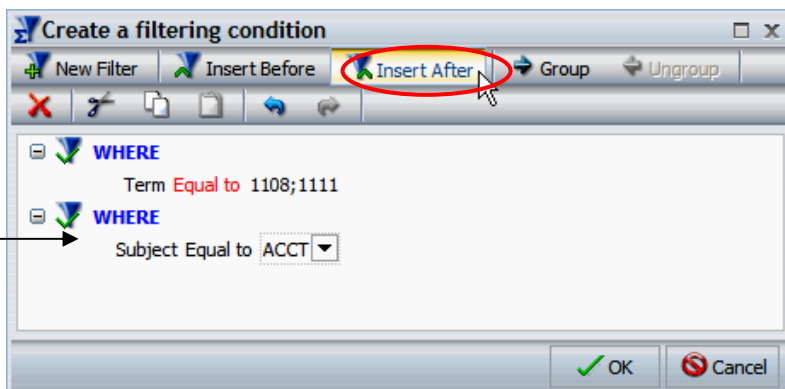
Many queries require several filters in order to accurately report the specific data the user wants. The helpful thing about an Advanced Filter is that it allows the user to view and manipulate all filters on one pane. In order to add another filter using the Advanced Filter tool, simply click the **New Filter** icon and a new filter will appear ready for you to select a field, operand, and value(s).



Grouping Filter Elements:

Up to this point, the Advanced Filter has had much the same functionality of a Simple Filter. However, where a Simple Filter is limited to one function at a time, an Advanced Filter allows the user to connect and group filter elements to indicate how they should interact. This ability lets you build much more complex filters when you need more specific data. *The following example illustrates a filter that will report all rows of data for the courses ACCT 201, ACCT 202, Econ 211, and ECON 212 for the Terms: Fall 2010 & Spring 2011.*

*For this example, we've selected "Subject" for the field, leave "Equal to" for the operand, and choose "ACCT" for the value for the first section of the 2nd filter. To add more lines to this filter, click on the last line and choose **Insert After** from the menu.*

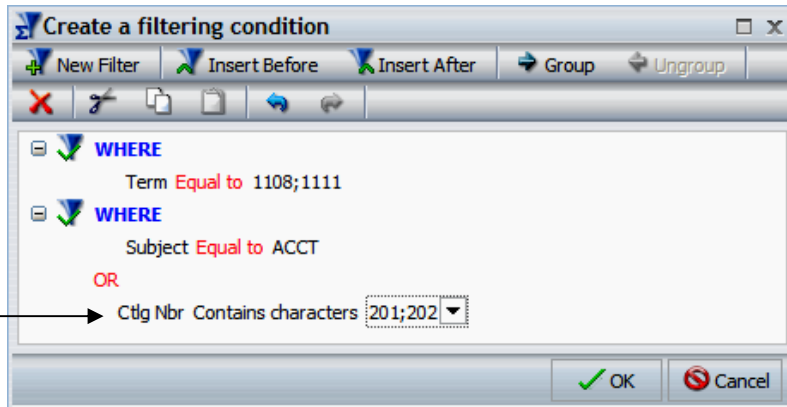


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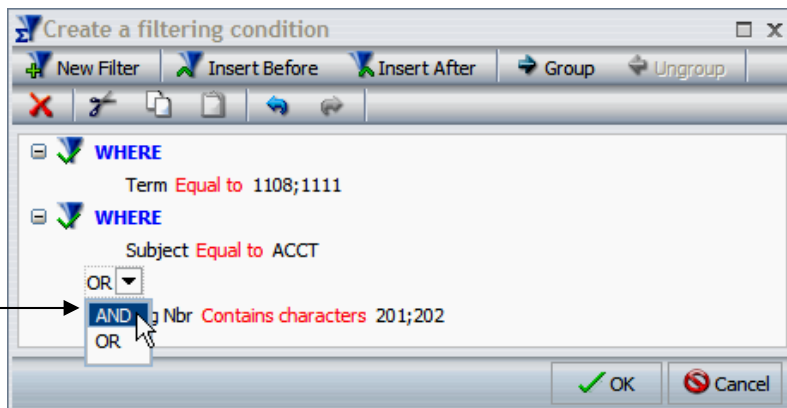
Insert Tools:

To add additional elements to a filter, select either **Insert Before** (which will insert the new element *before* a selected filter), or **Insert After** (which will insert the new element *after* a selected filter).

For this example, we've chosen "Ctlg Nbr" for the field, changed the operand to "Contains characters", and added "201" and "202" as values to this new section of the filter.



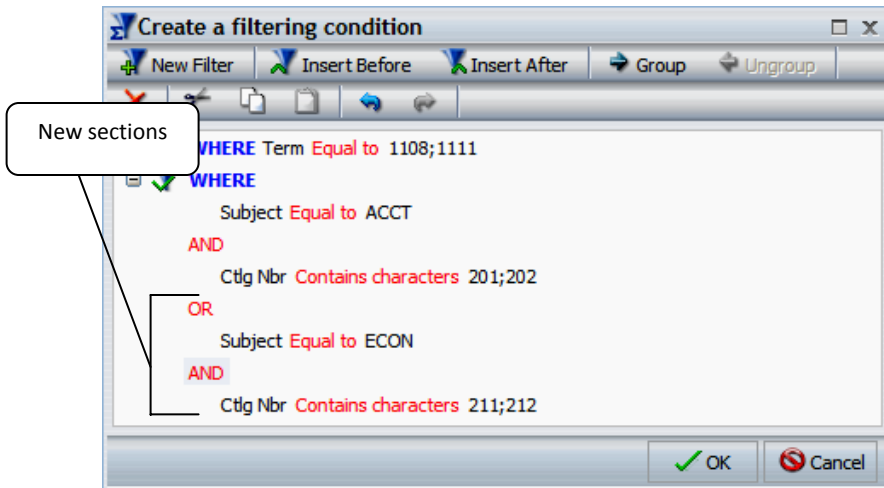
The Insert tools will initially add the function "OR" between the new and the existing sections as seen in the above example. You can change "OR" to "AND" if you want this new section to eventually be grouped with the previous one by simply double-clicking on "OR" and selecting "AND" from the drop-down box.



To continue adding to this filter, click on a section of the filter to select it, and again use the Insert tools to insert a new section either before or after the selected section).

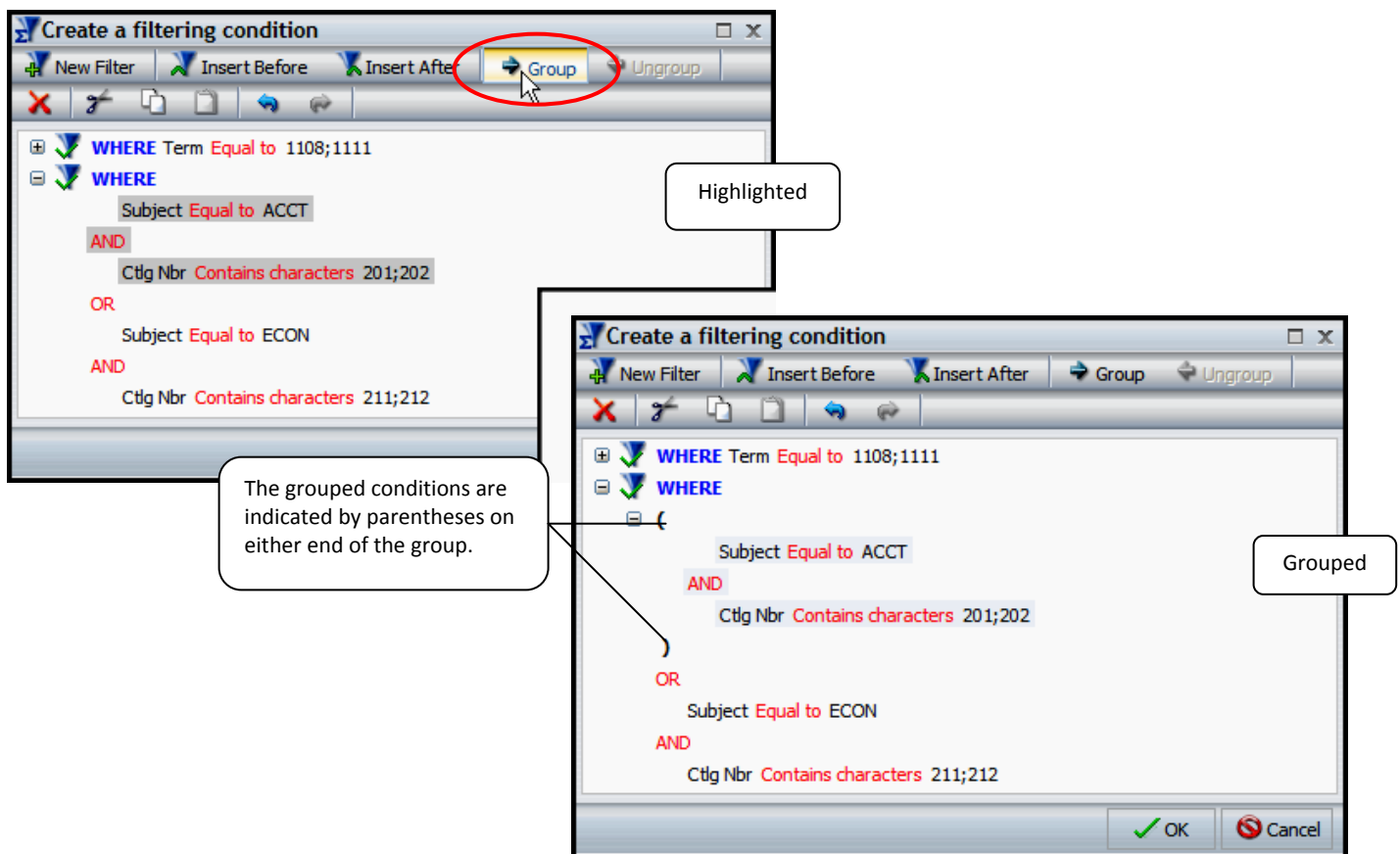
For this example, we've used **Insert After** to add two more sections; one with "Subject" as the field, "Equal to" as the operand, and "ECON" as the value. We have chosen to leave the "OR". An additional section was inserted after this one with "Ctlg Number" as the field, "Contains characters" as the operand, and "211" and "212" as the values. We changed the "OR" to "AND" for this second addition as can be seen on the example below.

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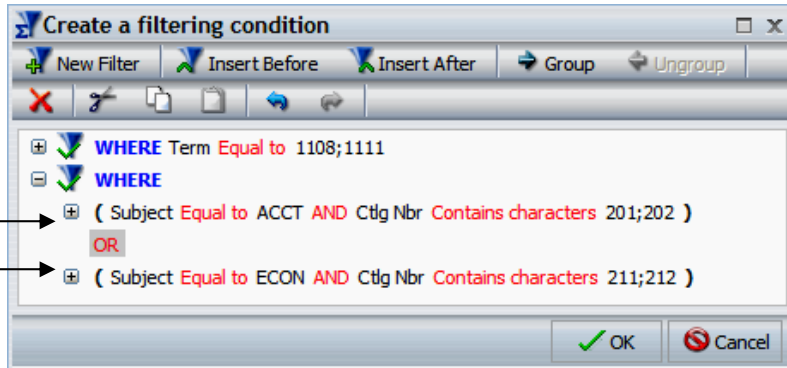
Grouping Tool:

Grouping is used in an Advanced Filter to help identify where comparisons should be included. Grouping lines of a filter together will connect each line within the group so that the filter will process the data as one set of specific filter instructions. This ensures that the data is filtered correctly to provide the report you want. To group lines, highlight the lines you want to group (those with “AND” in between them) by holding shift and clicking the up and down arrow keys on your keyboard. After the lines have been highlighted, select **Group** from the menu bar.



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It may be a good idea to reduce the grouped sections to one line for easier readability. This can be done by clicking on the  icons next to each group. This will result in the following:



Additional Information:

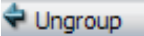
Here is some additional information about the Advanced Filter tool.

Copy and Paste:

Sometimes it may be helpful to be able to copy and paste groups or lines of a filter if, for instance, you need several comparisons with only a minor change in each line. You can copy one line and paste it repeatedly and change the minor detail on each line to save time.

This is done using the  (copy) and  (paste) icons on the menu bar.

Ungroup:

If you've made a grouping mistake, or decide you want to change how your filter lines are grouped, highlight the group you want to change and select the  icon from the menu bar.

Re-Open Advanced Filters:

Once you click **OK** on the Advanced Filter tool, your design pane may look something like this:

