



PeopleSoft Data Dictionary EPM: Simple Filter

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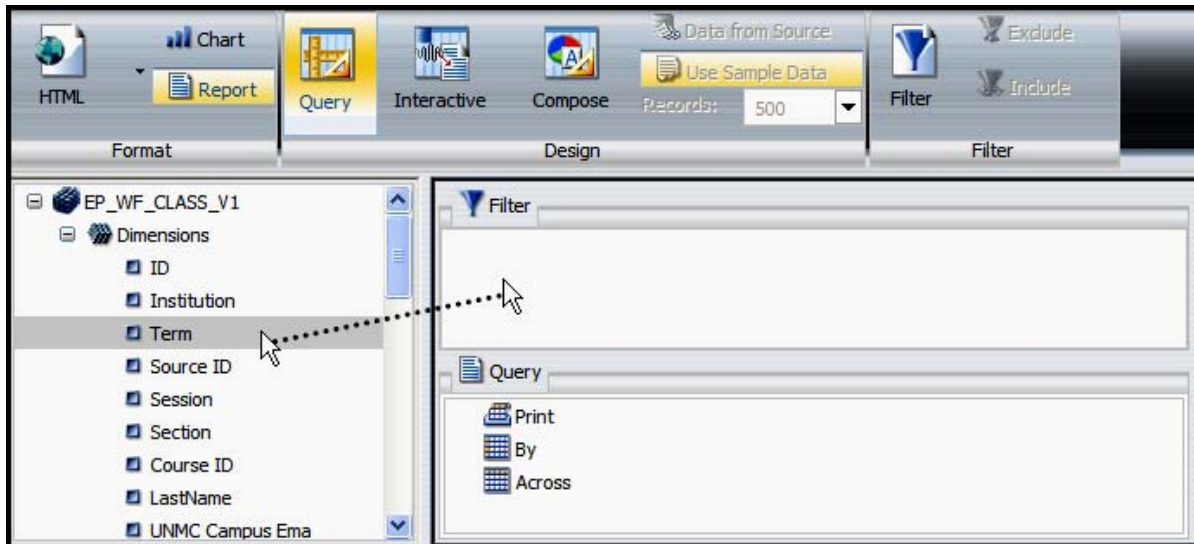
EPM Query Instructions – Simple Filter

Simple 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 **Simple Filter** tool. (For information on the Advanced Filter, see the “Advanced Filter” document.) To filter a field, you must first select it in the Data Pane (or field listing). Once you’ve selected a field to filter, there are four ways to launch the filter tool.

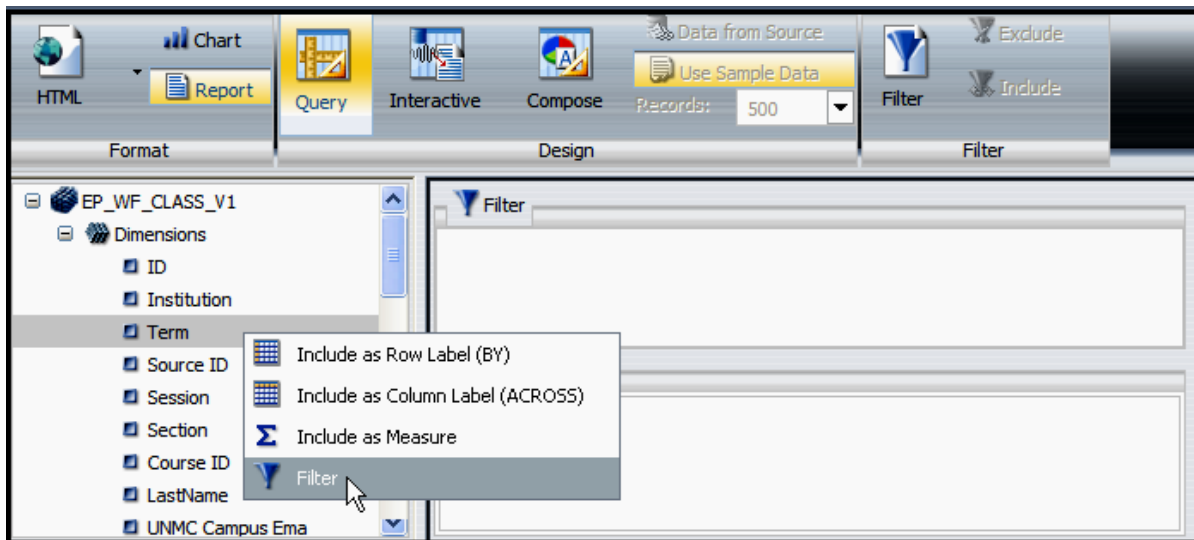
Launch the Filter Tool (Four options):

- A. Click and drag the field to the Filter Pane.



Or

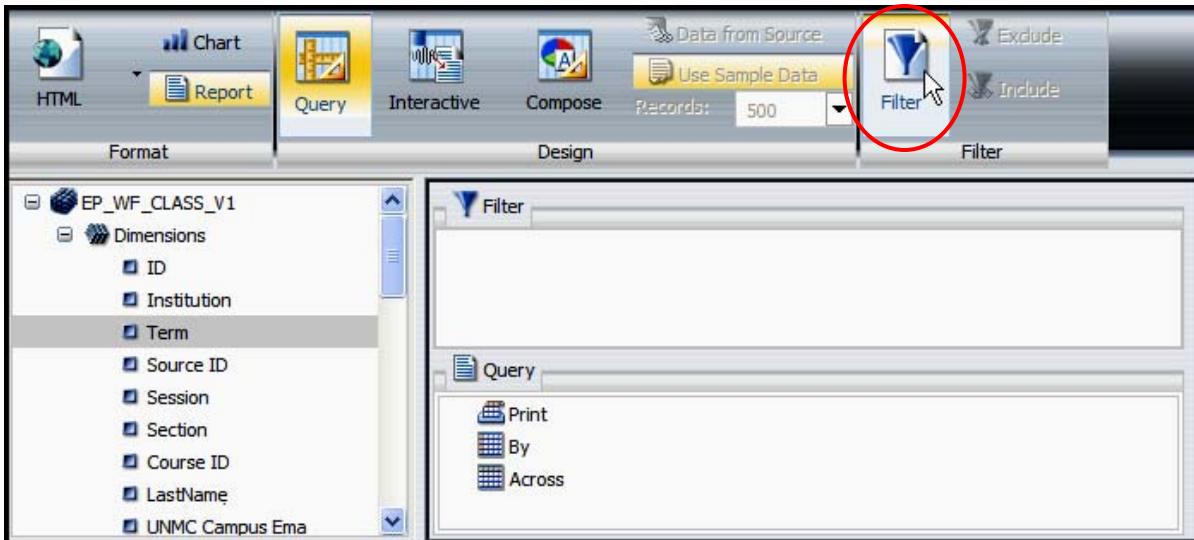
- B. Right-click on the field and select **Filter**.



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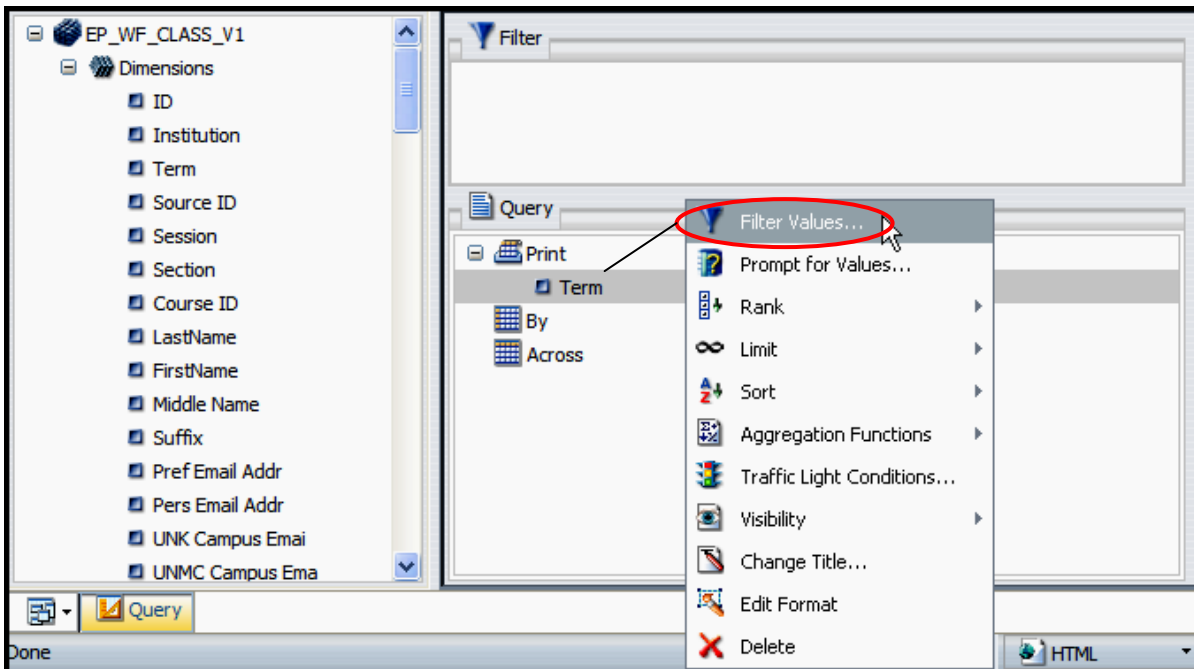
Or

C. Select the field, then click the **Filter** icon in the Control Panel near the top of the screen.



Or

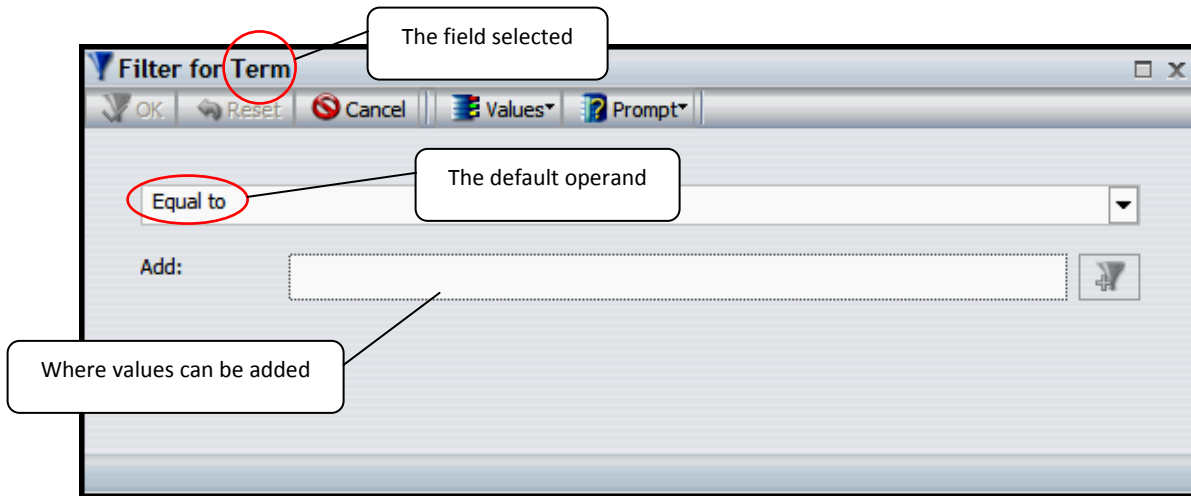
D. If your field is in the Query Design Pane, select it, right-click and choose **Filter Values**.



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Setting up a Simple Filter:

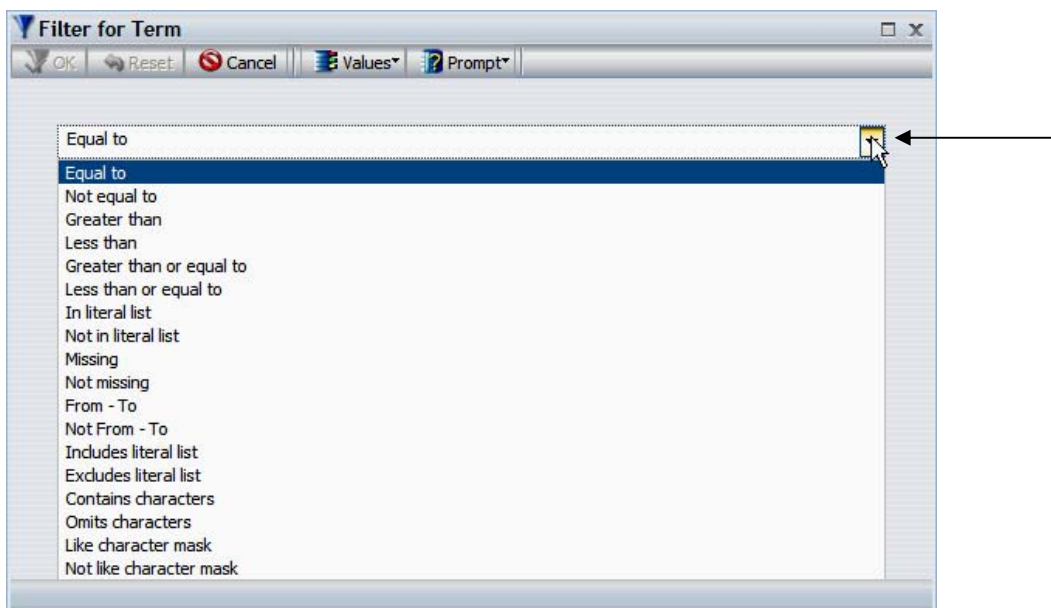
After you've selected a field to filter and launched the **Filter** tool, there are two additional filter components to consider: the Operand, and the Value(s). The values specify what to be filtered for, and the operand will determine how the values will be filtered. The default operand is "Equal to", which can be seen in the drop-down box of the filter tool. Values can be inserted in the box next to the word "Add:".



NOTE: It is important to select your operand before adding values, because when the operand is changed, the values will disappear and need to be re-entered.

Choosing an Operand:

There are numerous operands to choose from in the drop-down box. Simply click the down arrow to open the box and select an operand.

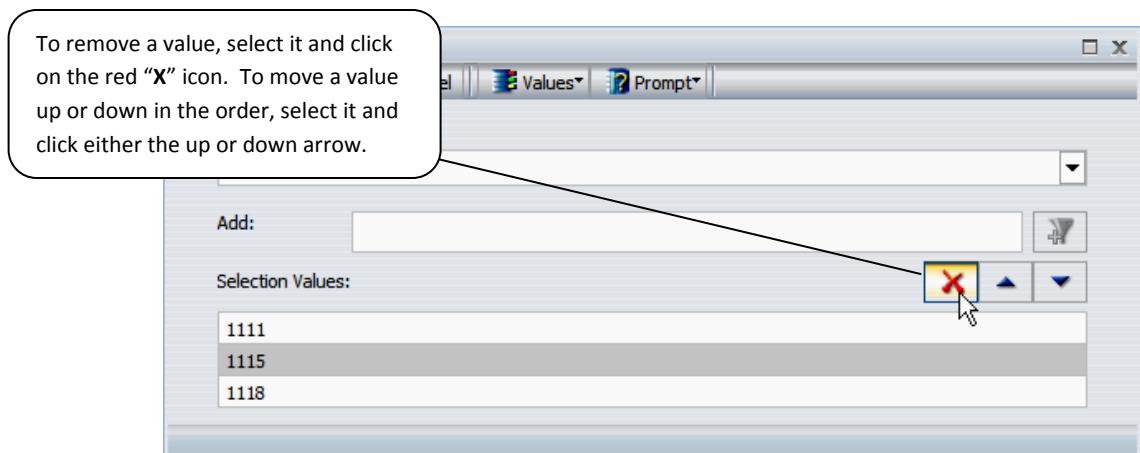
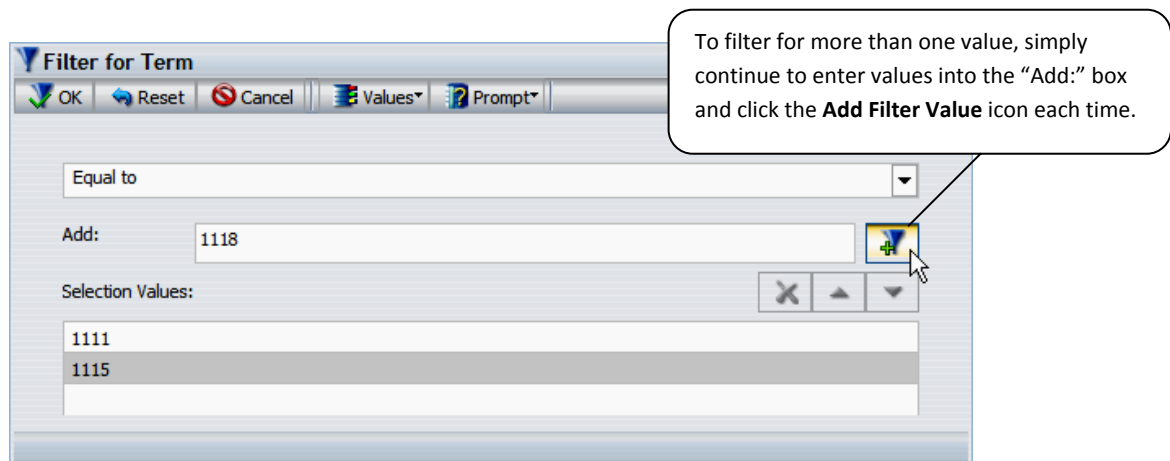
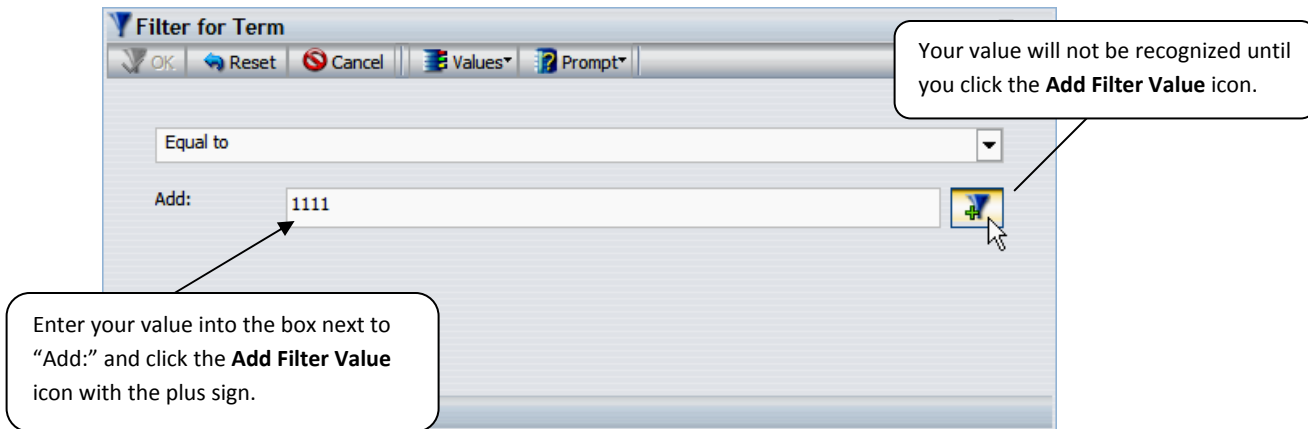


NOTE: **Equal to** is a commonly used operand. Others that are common include: **From – To**, and **Contains Characters**, both of which will be illustrated on pg. 5.

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Adding Values:

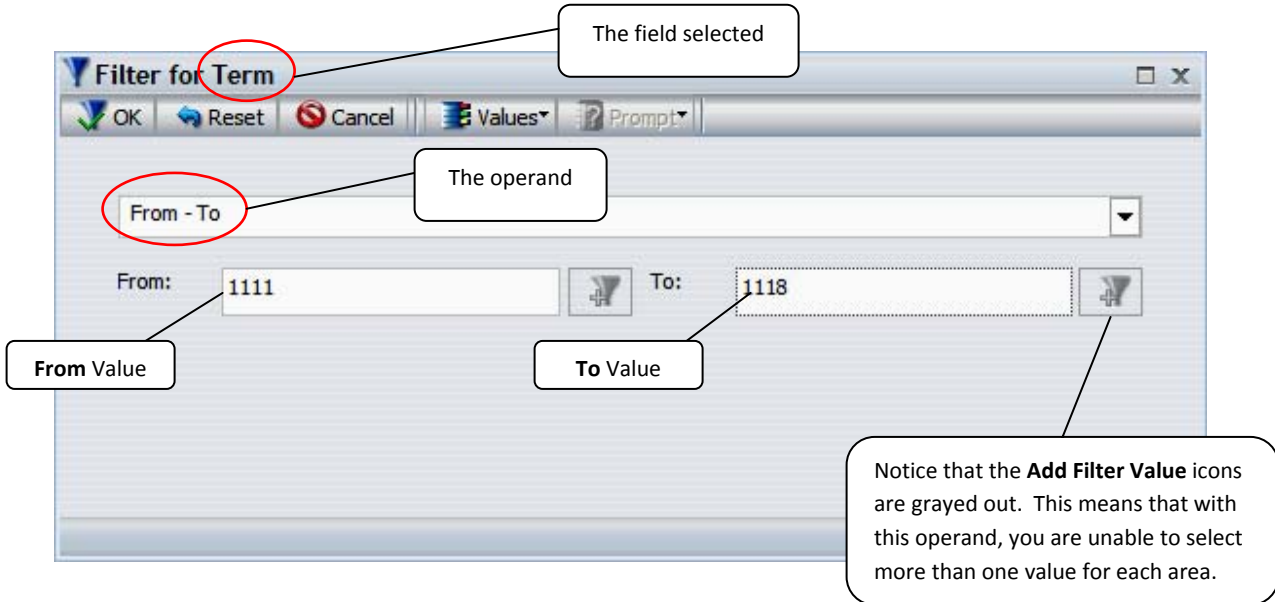
After an operand has been selected, it is important to include values so the filter can know what data to either include or exclude. Values need to be specific to the field that you have chosen to filter. For instance, with this example, “Term” has been chosen as the field so appropriate values would be term codes such as 1111, 1115, 1118, etc. Refer to the following illustrations for instructions on how to add a value or values:



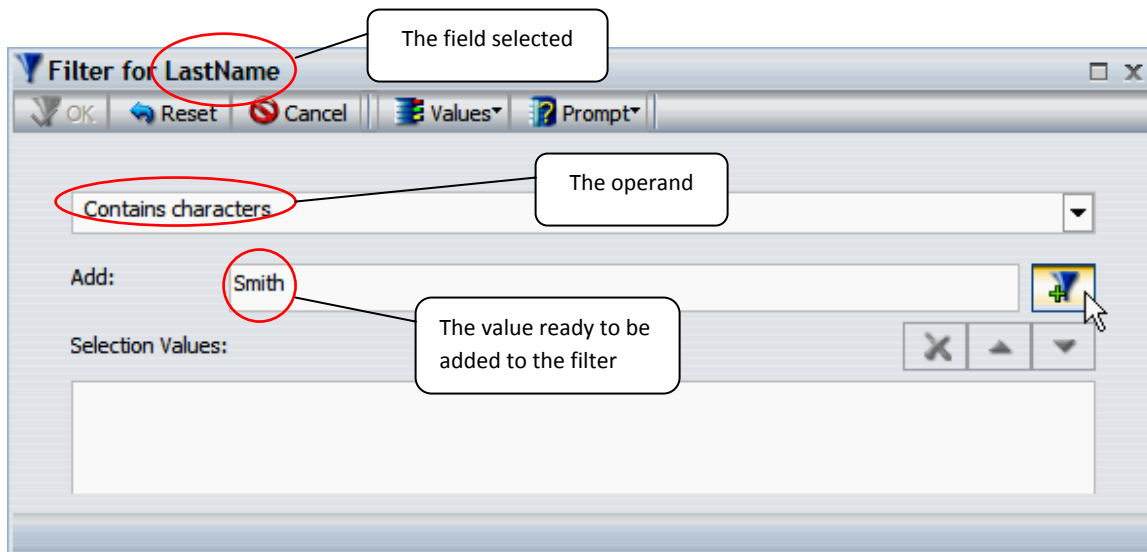
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Example Filters:

A common filter that does not use **Equal to** may instead include the operand **From – To**. For this filter, **Term** is used as the selected field, and this example will use values “1111” and “1118” to illustrate a filter intended to include data **From:** the Spring term of 2011 **To:** the Fall term of 2011.






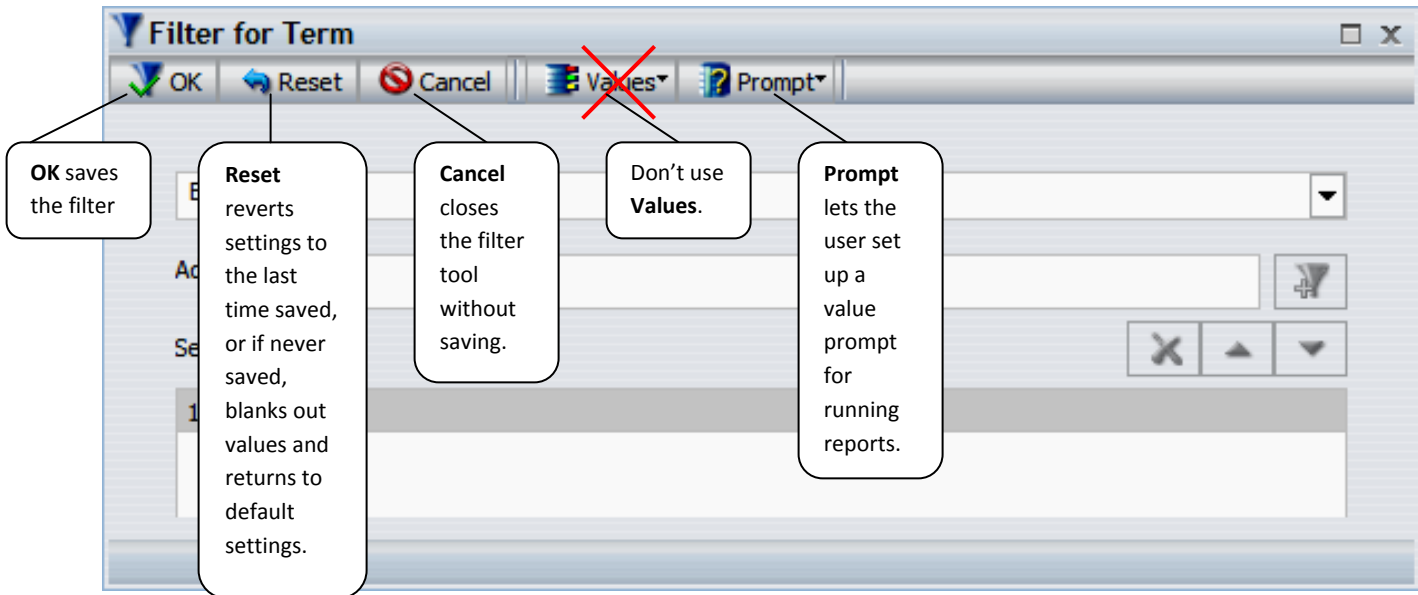
Another common filter might use the operand **Contains Characters**. This operand will include all data that contains the characters that are indicated as values for this filter. In this case, **LastName** might be a good field to select, and this example will use the name value “Smith” to illustrate a filter intended to include only data associated with the name Smith, retrieving last names such as ‘Smith-Jones’ or ‘Anderson-Smith’.



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Filter Tool Functions:

In addition to the icons used for adding , removing , and ordering  values, the filter tool also contains other helpful functions to assist in setting a simple filter:

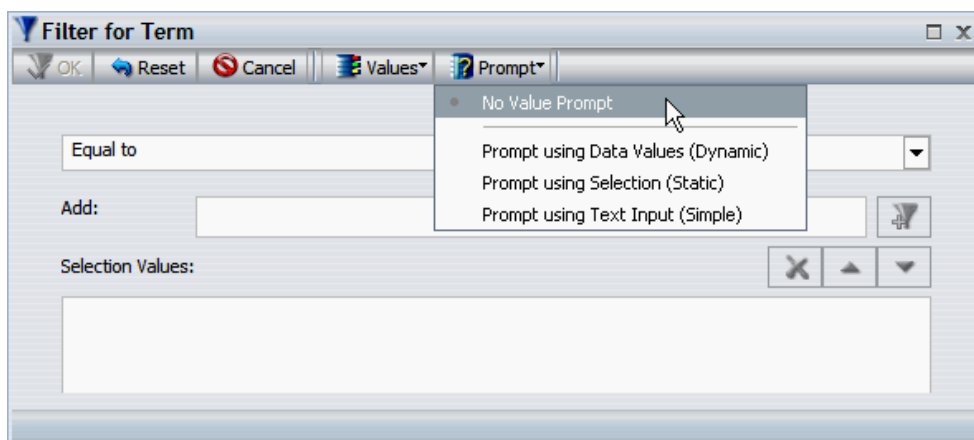


Prompt:

While some of the other filter tool functions are relatively straight-forward, the **Prompt** function may require some additional explanation. The Prompt function allows you to set the filter to prompt you or anyone running your query any time values are required to run the query. The dashboard user must indicate the values they wish to filter every time, thus allowing you to keep the query and filter mostly static in InfoAssist. As a default setting, the Prompt function is set to "No Value Prompt". In order to set the filter to prompt a value, there are three options:

- Prompt using Data Values (Dynamic)
- Prompt using Selection (Static)
- Prompt using Text Input (Simple)

To change the prompt settings, click on the **Prompt** icon and select the Prompt setting you desire.



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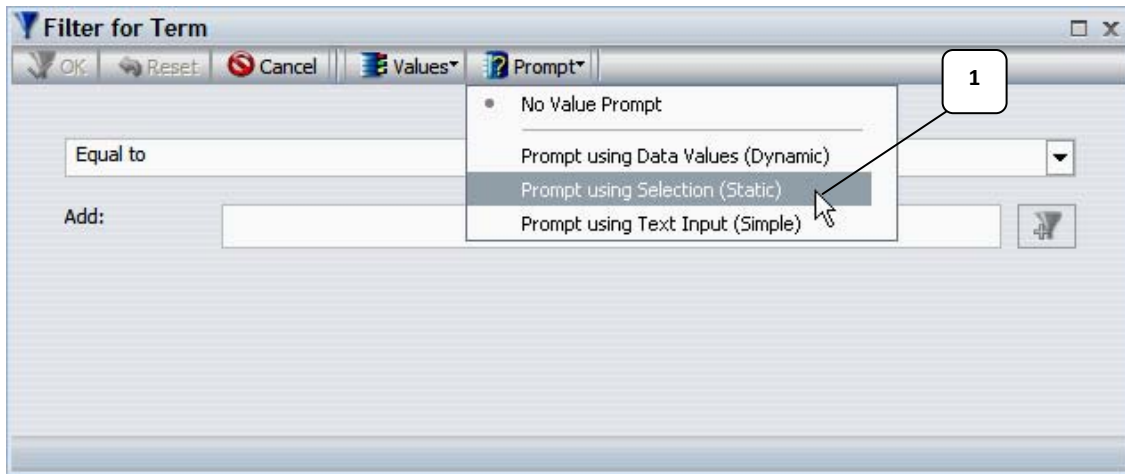
Prompt using Data Values (Dynamic):

Due to the fact that this setting draws from the data base to pull all of the available values, it can take a significant amount of time to utilize, therefore it is not the suggested setting and will not be discussed in detail.

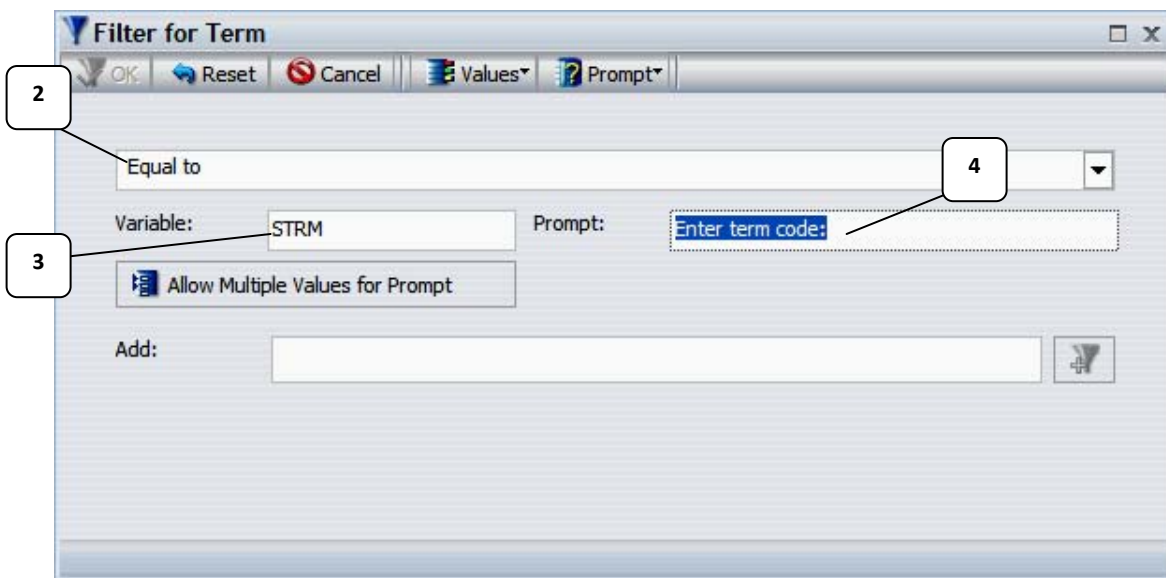
Prompt using Selection (Static):

This feature allows you to specify and limit the values in the prompt to those that you identify when setting up the prompt. Essentially, you can establish your own list of possible values for the dashboard user to select from when running this query with this filter. To set up your list of values, do the following:

1. Select 'Prompt using Selection (Static)' from the Prompt menu.

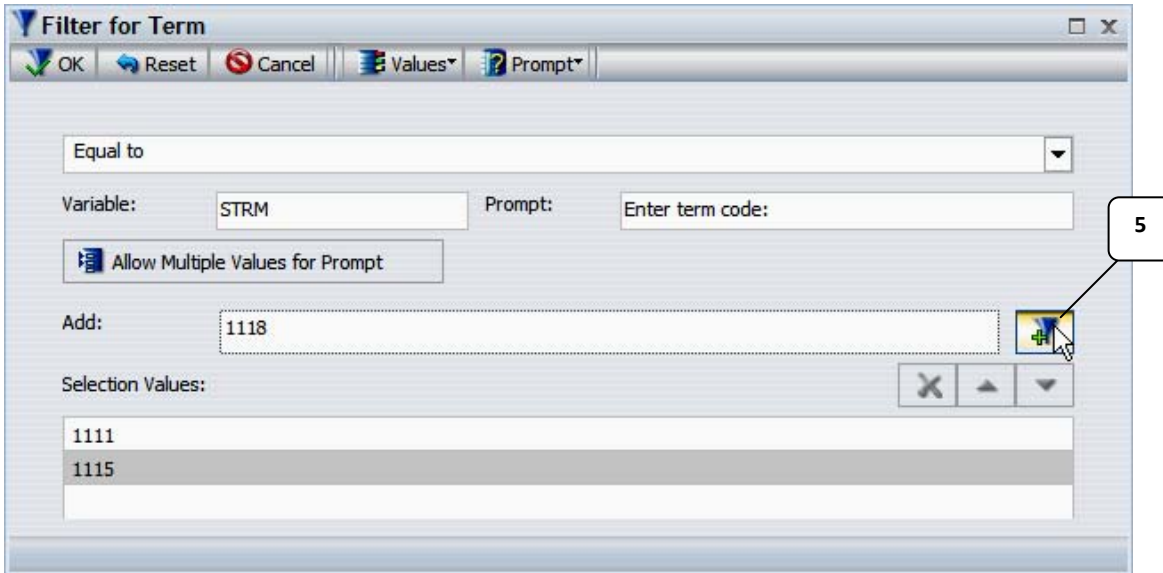


2. Set or confirm your operand.
3. Note that "Variable" is the field name of the field you have chosen for your filter.
4. Type in the message you want the user to see when prompted.

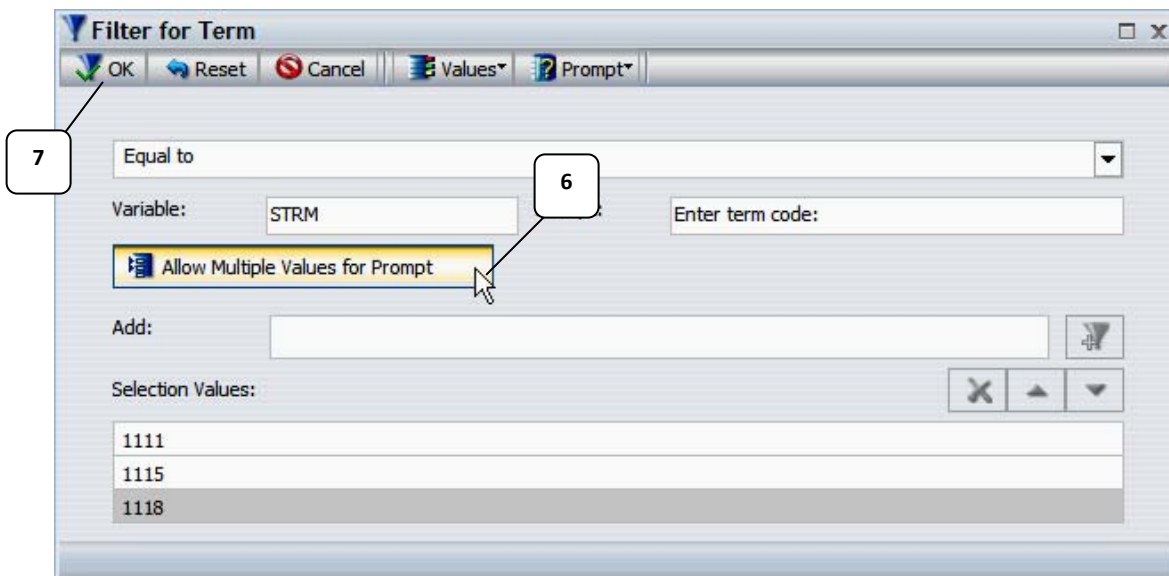


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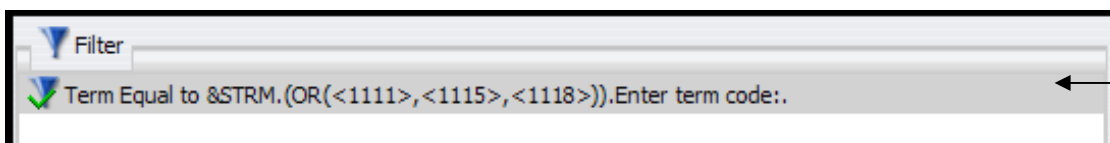
5. Add values one at a time (as seen on pg.4).




6. To allow the user to select multiple values for their report, click the “Allow Multiple Values for Prompt” button.
7. When all the values are entered, click the OK icon to save.

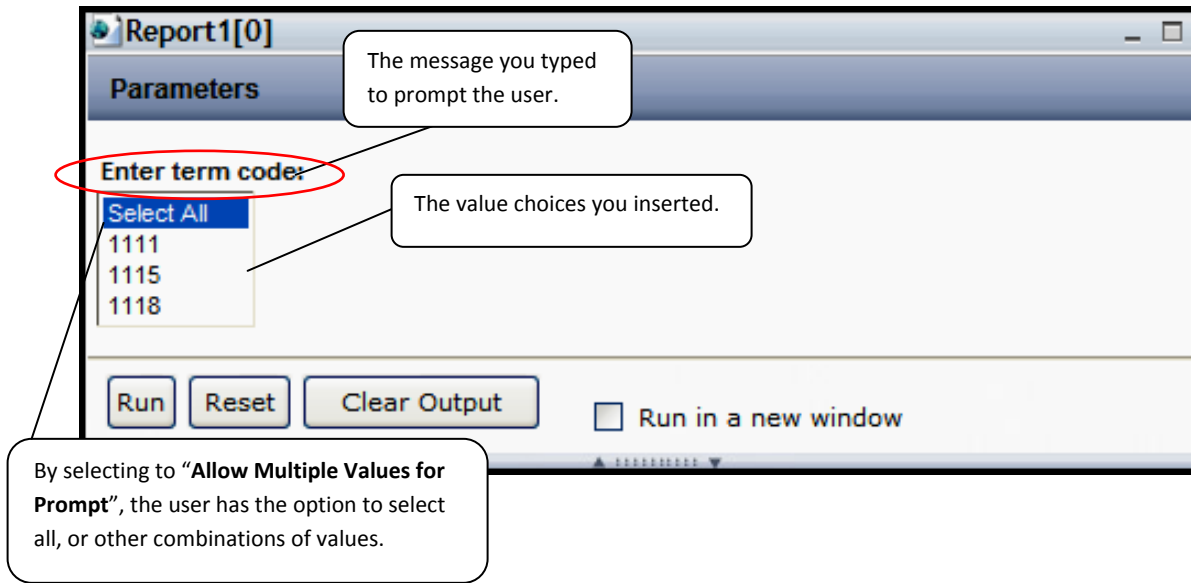


After saving this filter prompt, your Filter Pane will be populated with something like the following:



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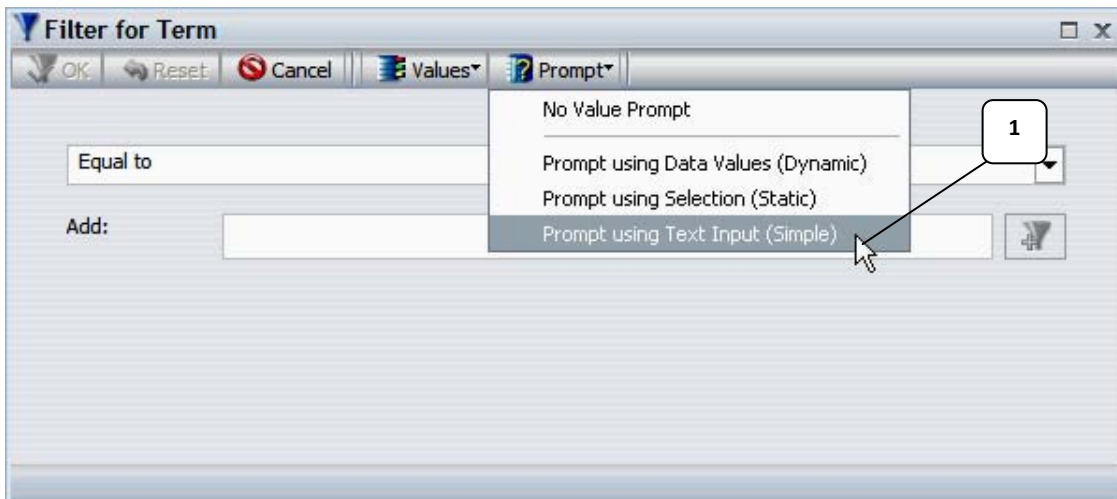
If you click  from the Quick Access Toolbar at the top of your InfoAssist browser, you will see a preview of what the dashboard user will see before running a query with this example Simple Filter.



Prompt using Text Input (Simple):

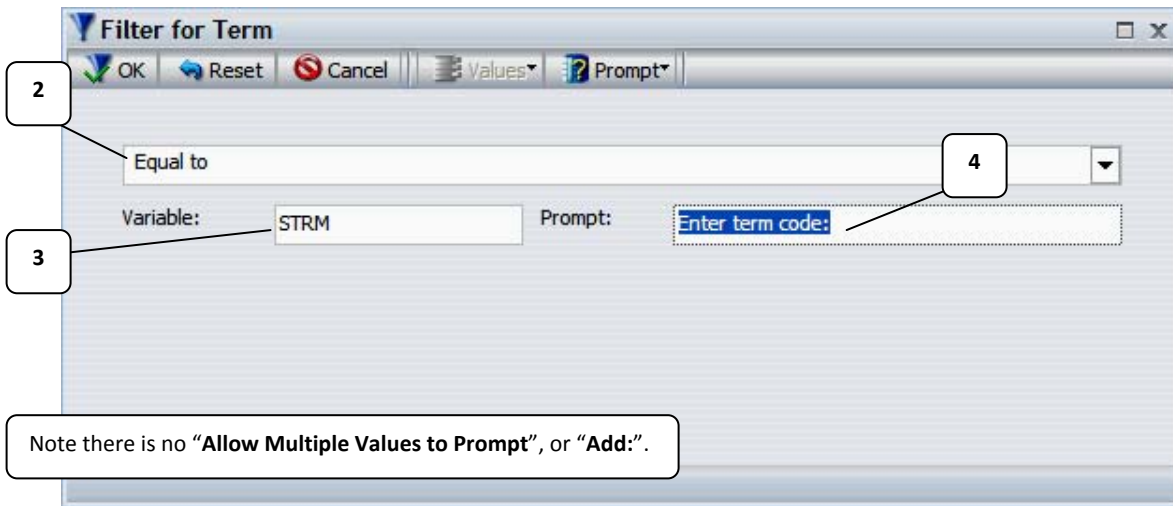
This feature allows you to prompt a dashboard user to type in a value each time before running this query with this filter. To set up your Prompt using Text Input (Simple), do the following:

1. Select 'Prompt using Text Input (Simple)' from the Prompt menu.

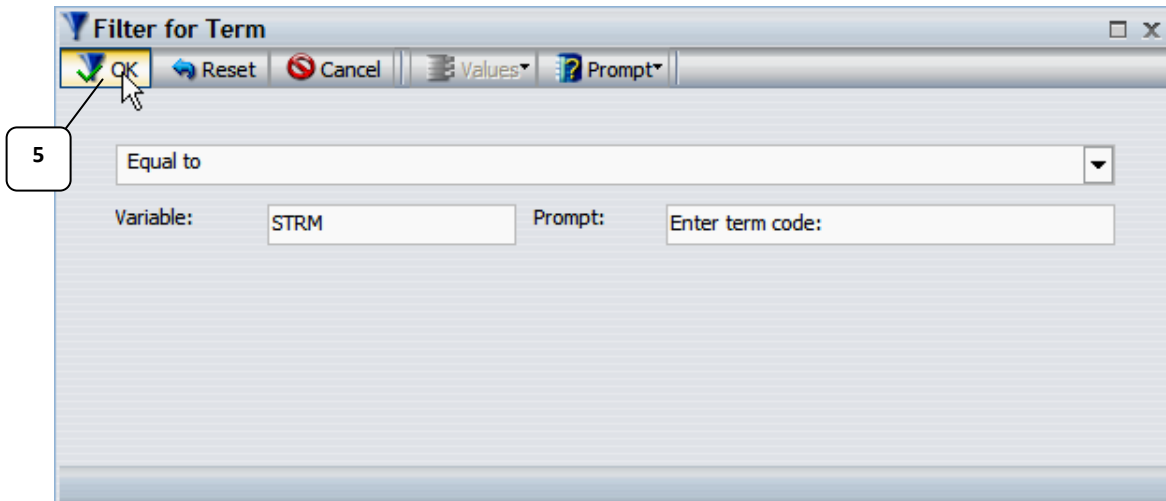


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2. Set or confirm your operand.
3. Note that “Variable” is the field name of the field you have chosen for your filter.
4. Type in the message you want the user to see when prompted.




5. When the prompt message is entered, click the OK icon to save.

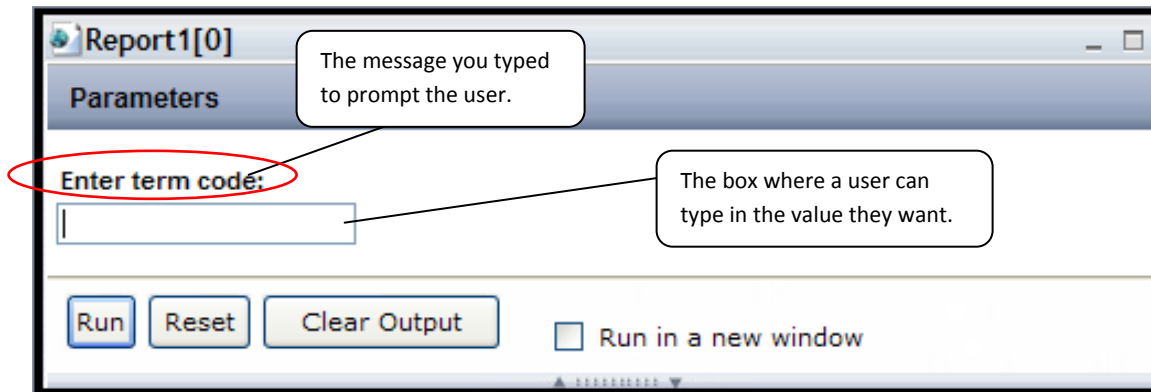


After saving this filter prompt, your Filter Pane will be populated with something like the following:



EPM Query Instructions – Simple Filter

If you click  from the Quick Access Toolbar at the top of your InfoAssist browser, you will see a preview of what the dashboard user will see before running a query with this example Simple Filter.



Filter Option List:

After a filter has been set up and saved, it can be: Opened (as a **Simple Filter** or an **Advanced Filter**), Deleted, or Excluded/Included. In order to reach these options, right-click on the filter in your Filter Pane.

