Report Filtering In WebIntelligence™ 4

Michael Ward
Senior Partner
Trademarks & Copyrights

The Business Objects logo, Business Miner, Business Query, and WebIntelligence are registered trademarks of SAP/Business Objects S.A. The Business Objects tagline, Broadcast Agent, Business Objects, Personal Trainer, Rapid Deployment Templates, and Set Analyzer are trademarks of Business Objects S.A. All screen shots from Business Objects software products are copyrighted by SAP/Business Objects, S.A., all rights reserved.

Microsoft, Windows, Windows NT, Windows 7, Access, Microsoft Windows VBA, the Visual Basic Logo, and other names of Microsoft products referenced herein are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Oracle is a registered trademark of Oracle Corporation. All other names of Oracle products referenced herein are trademarks or registered trademarks of Oracle Corporation.

All other product and company names mentioned herein are the trademarks of their respective owners. CTTS is not an authorized partner of Business Objects S.A.
Agenda

◊ Query Filters
◊ Quick Filters
◊ Local Report Filter Window
◊ Editing Local Filters
◊ Filtering On Headings
◊ Local Report Filter Summary Template
◊ Input Controls (Gadgets)
Adding Query Filters

♦ Filters

◇ Restrict amount of Data Retrieved from Database
◇ Predefined, Simple and Complex
◇ More than 1 can be used in Single Query
◇ “Global” Filter
Adding Query Filters

♦ Predefined Filters
  ◆ Cannot be Changed
  ◆ Created by Designer
  ◆ More than 1 can be used in Single Query
Adding Predefined Query Filters

1. Drag and Drop or Double-Click to Add Filter

2. Click Run query
Adding Predefined Query Filters

3. Filtered Results Displayed

4. Click Data Access

5. Click Edit
Removing Query Filters

1. Select Filter to Remove

2. Select Remove button or Drag filter to Universe Outline window
Simple Query Filters

♦ Created by Users
♦ Made up of 3 parts
  ◇ Objects
  ◇ Operators
  ◇ Operands
Simple Query Filters

♦ Object
  ◊ Dimension, Detail, or Measure (ie: Column of Data)

♦ Operator
  ◊ Describes Relationship Between Object and Operand

♦ Operand
  ◊ Element that is Compared to the Object

Example: Year Equal to ‘2012’
(Object) (Operator) (Operand)
Adding Simple Query Filters

1. Left-Mouse Click on Dimension or Detail Object in Result Objects Pane

2. Click the Yellow Filter Button

3. Press CTRL or Shift and Single or Multi-Select Values from List of values

4. Click > button to Select Values

5. Click OK
Adding Simple Query Filters

6. Accept Default InList or Select Different Operator

7. Click Run query
Adding Simple Query Filters

8. Results Displayed

![Screenshot of report with data]

<table>
<thead>
<tr>
<th>Year</th>
<th>Quarter</th>
<th>State</th>
<th>Store name</th>
<th>Sales revenue</th>
<th>Quantity sold</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>Q1</td>
<td>California</td>
<td>e-Fashion Lo</td>
<td>$421,390</td>
<td>2,453</td>
</tr>
<tr>
<td>2008</td>
<td>Q1</td>
<td>California</td>
<td>e-Fashion Sa</td>
<td>$308,356</td>
<td>1,864</td>
</tr>
<tr>
<td>2008</td>
<td>Q1</td>
<td>Florida</td>
<td>e-Fashion Mi</td>
<td>$203,882</td>
<td>1,210</td>
</tr>
<tr>
<td>2008</td>
<td>Q1</td>
<td>Illinois</td>
<td>e-Fashion Ch</td>
<td>$255,658</td>
<td>1,537</td>
</tr>
<tr>
<td>2008</td>
<td>Q2</td>
<td>California</td>
<td>e-Fashion Lo</td>
<td>$423,807</td>
<td>2,423</td>
</tr>
<tr>
<td>2008</td>
<td>Q2</td>
<td>California</td>
<td>e-Fashion Sa</td>
<td>$365,531</td>
<td>2,048</td>
</tr>
<tr>
<td>2008</td>
<td>Q2</td>
<td>Florida</td>
<td>e-Fashion Mi</td>
<td>$221,469</td>
<td>1,243</td>
</tr>
<tr>
<td>2008</td>
<td>Q2</td>
<td>Illinois</td>
<td>e-Fashion Ch</td>
<td>$364,724</td>
<td>2,065</td>
</tr>
<tr>
<td>2008</td>
<td>Q3</td>
<td>California</td>
<td>e-Fashion Lo</td>
<td>$432,215</td>
<td>2,897</td>
</tr>
<tr>
<td>2008</td>
<td>Q3</td>
<td>California</td>
<td>e-Fashion Sa</td>
<td>$343,652</td>
<td>2,237</td>
</tr>
</tbody>
</table>
Simple Query Filters

♦ Operators

- Equal to
- Not Equal to
- Greater than
- Greater than or Equal to
- Less than
- Less than or Equal to
- Between
- Not Between
- In list
- Not in list
- Is null
- Is not null
- Matches pattern
- Different from pattern
- Both
- Except
Operators

♦ Single-value Operators
  ◇ Equal to
  ◇ Not Equal to
  ◇ Greater than
  ◇ Greater than or equal to
  ◇ Less than
  ◇ Less than or equal to
  ◇ Except
      ♦ Equivalent to Minus in Combined Queries

Example: Year Equal to ‘2012’
Operators

♦ Multiple-value Operators

♦ Between

Example: Year Between ‘2008’ and ‘2012’

♦ Not between

Example: Year Not Between ‘2009’ and ‘2011’

♦ Both

♦ Equivalent to Intersect in Combined Queries

Example: Invoice Month Both ‘3,6’
Operators

♦ Multiple-value Operators
  ◊ In list
    ♦ By Default, Maximum of 99 Values
  ◊ Not in list

*Example:* Year In list ‘2011,2012

*In Other Terms:* Year Equal to ‘2011’
  or
  Year Equal to ‘2012’
Operators

♦ Null Operators

◊ Is null
  ♦ Empty Column

◊ Is not null
  ♦ Not Empty Column

Example: Name of manager Is null

Does Not RequireOperand
Operators

♦ Matches pattern/Different from pattern

♦ Wildcards Used

_ = Any Single Character
%
(= Any Number of Characters
(including none)
Operators

♦ Pattern Matching & Wildcards

_ = Any Single Character

Example: Category Matches pattern ‘S_irts’
Returns: Skirts and Shirts Categories
Operators

♦ Pattern Matching & Wildcards

% = Any Number of Characters (including none)

♦ Starts with…

*Example:* Line Matches pattern ‘City%’
*Returns:* City Skirts and City Trousers Lines

♦ Ends with…

*Example:* Line Matches pattern ‘%Trousers’
*Returns:* Trousers and City Trousers Lines
Operators

♦ Pattern Matching & Wildcards

% = Any Number of Characters (including none)

♦ Contains

Example: Line Matches pattern ‘%Shirt%’

Returns: Shirt Waist and Sweat-T-Shirts
Operators

♦ Pattern Matching & Wildcards
  ◇ Must Use “Matches pattern” or “Different from pattern” Operator
  ◇ Good for Finding Lists with Similar Values
  ◇ Depends on Database
  ◇ Will Cause Queries to run longer
Operands

♦ Constant
  ◦ Typed in Values
  ◦ Multiple Values Use Separator (See Regional Settings)

♦ Value(s) from list
  ◦ Select Values from Object’s List of Values (If Applicable)
  ◦ Use Control Key to Select Multiple (Depends on Operator Chosen)
Operands

♦ Prompt
- Can Type Value or Choose from List of Values
- Can Choose One or Many Values from List
  - Depends on Operator
- Typed in Values
- Multiple Values Use Separator (See Regional Settings)

♦ Object
- Compare Value of Object with Value from Another Object
Operands

♦ Result from Another query

◊ Similar to Subquery, except could be based on values from separate data provider
Applying Reporting Functions

- Ranking
- Breaking
- Outlining
- Sorting
- Filtering
- Calculations
1. Select Column to Apply Quick Filter

2. Select Filter Button
Report Filtering

3. Select Values to Filter
3. Move Selected Values
5. Change Operators if Necessary
6. Click OK
7. Filter Applied
Report Filtering

1. With Nothing Selected in the report, Click On Filter
Report Filtering

3. Select at what Level to Apply filter

4. Click Add filter
Report Filtering

5. Select Object(s) to base filter upon

6. Click OK

7. Select Operator

8. Select Values

9. Click OK
Report Filtering

10. To add additional Filters Select Filter / Add Filter

Filter Applied
Functions

♦ Breaking

♦ Ranking

♦ Sorting

♦ Filtering
Filtering on Headings

1. Click On a Header Value

2. Select Filter

3. Select Add Filter
Filtering on Headings

4. Select Values to Display

5. Select > to Select Values

6. Select OK
Filtering on Headings

Only Filtered Data is Displayed

Report 1

<table>
<thead>
<tr>
<th></th>
<th>2011</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accessories</td>
<td>$2,025,533</td>
<td>$669,834</td>
<td>$1,113,768</td>
<td>$1,113,929</td>
</tr>
<tr>
<td>City Trousers</td>
<td>$59,827</td>
<td>$12,731</td>
<td>$31,988</td>
<td>$31,988</td>
</tr>
<tr>
<td>Leather</td>
<td>$35,941</td>
<td>$11,872</td>
<td>$22,986</td>
<td>$22,986</td>
</tr>
<tr>
<td>Outerwear</td>
<td>$311,455</td>
<td>$2,341</td>
<td>$160,505</td>
<td>$160,505</td>
</tr>
<tr>
<td>Sweaters</td>
<td>$282,895</td>
<td>$582,614</td>
<td>$156,164</td>
<td>$155,318</td>
</tr>
</tbody>
</table>
Filtering

1. Select Filtered Object

2. Select Filter / Edit Filter
Filtering on Headings

♦ Edit Filter

1. Click OK

2. Revise Values to Display

3. Change Operator If Desired

4. Move New Values to Selected Values Window

5. Click OK
Filtering on Headings

♦ Remove Filter

1. Select Object where Filter has been applied

2. Select Filter / Remove Filter
Input Controls

♦ Creation of filters on Dimension, Detail or Measures using gadgets such as slider bars, Combo boxes, etc
♦ Can be applied at the block or section level
♦ Can be applied to all block styles
♦ Can be applied at the same time as Drill filters or other simple/complex filters
Input Controls

1. Optional – Select object to Apply Input Control

2. Select Controls

3. Select Define Control
Report Filtering in WebIntelligence™ 4

Input Controls

3. Select the Object to Base the Input Control Gadget on

5. Select a Single Value or Multi Value Input Control

4. Select Next

6. Set the Properties for the Control

7. Select Next
Input Controls

8. Apply the Input control to the Report Element (By Block or Report)

9. Select Finish

10. Select All Values or a Specific Value(s)

11. Note Changes to block as Input Control Changes

12. Click New to add another Input Control
Input Controls

13. Select Object assign Input Control to

15. Select Control Type

14. Select Next

16. Set Control Properties

17. Select Next
Input Controls

18. Select at what level to Apply Control

19. Select Finish
Input Controls

20. Move the Slider to Desired Values

21. Note changes to the report

Note: Input Controls Used at the same time act as an AND statement between the filters
Input Controls

To Edit Input Controls

1. Place Mouse over header of Input Control

2. Select Edit Button

3. Make changes to Properties or Dependencies

4. Select OK

Note: Dependencies changes allow what part of the report the Input Control is assigned to

Note: Click on header to Close the Input Control
Agenda

- Query Filters
- Quick Filters
- Local Report Filter Window
- Editing Local Filters
- Filtering On Headings
- Local Report Filter Summary Template
- Input Controls (Gadgets)
Contact Information:

Michael Ward
Senior Partner
Creative Technology & Training Solutions, LLC
56132 Parkview
Shelby Township, MI 48316

(586) 677-8300  Office
(586) 677-8301  Fax
(586) 484-5523  Cell

www.cttsbi.com
MichaelWard@cttsbi.com
Thank you for participating.

Please provide feedback on this session by completing a short survey via the event mobile application.

SESSION CODE: 1101

Learn more year-round at www.asug.com