The purpose of this job aid is to explain how to filter data in Web Intelligence Reports in the Integrated HR-Payroll System.

Filtering Data

There are three levels of filtering data with WEB Intelligence Reports

Query Filters:

- Query filters are applied when the WEBI report is created by defining the data source for the WEBI report. These filters are used to ensure that the data presented in WEBI is uniform and only contains data that is relevant to the topic of the report.
- Query filters are not visible to the business user, nor can the business user modify them. The report definition including any filters that have been applied in the query will be disclosed in the report description document.
- Query filters are applied to the report before data is fetched from its data source.

Prompts:

- Prompts are defined when the WEBI report is created and are part of the data source definition.
- Prompts can be defined as either mandatory or optional and are used to enforce the security policy and to limit the initial data that is retrieved and stored within the WEBI report data structure.
- Prompts are applied before data is fetched from its data source.
- Business users can use available prompts to reduce the amount of data that is stored within the WEBI report data structure.

Report Filters:

- Report filters can be defined during report creation or by the business user as needed.
- Report filters are applied after the data is fetched from the data source and effectively hide data.
- Filters hide data that is visible in reports, charts, tables, and graphs but the data is still available within the WEBI report structure. Once a report filter is removed, no additional data refreshes are needed.
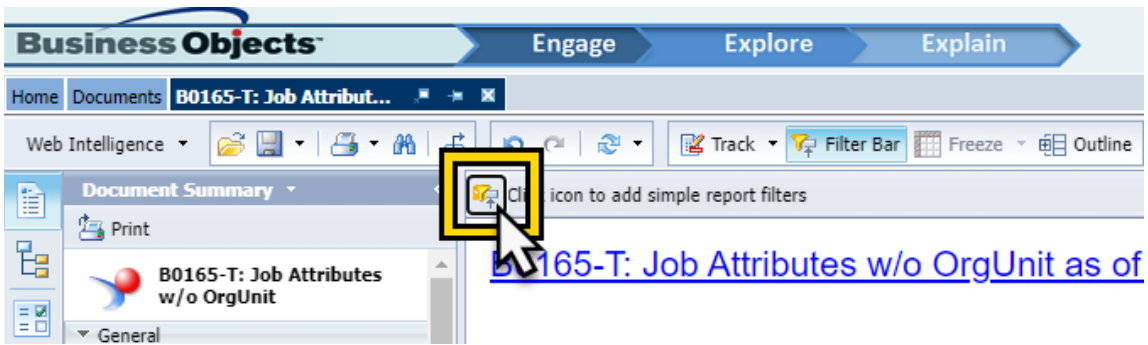
Report Filters

Using the Filter Bar in Reading Mode

The filter bar allows for the addition of multiple single value report filters on a report.
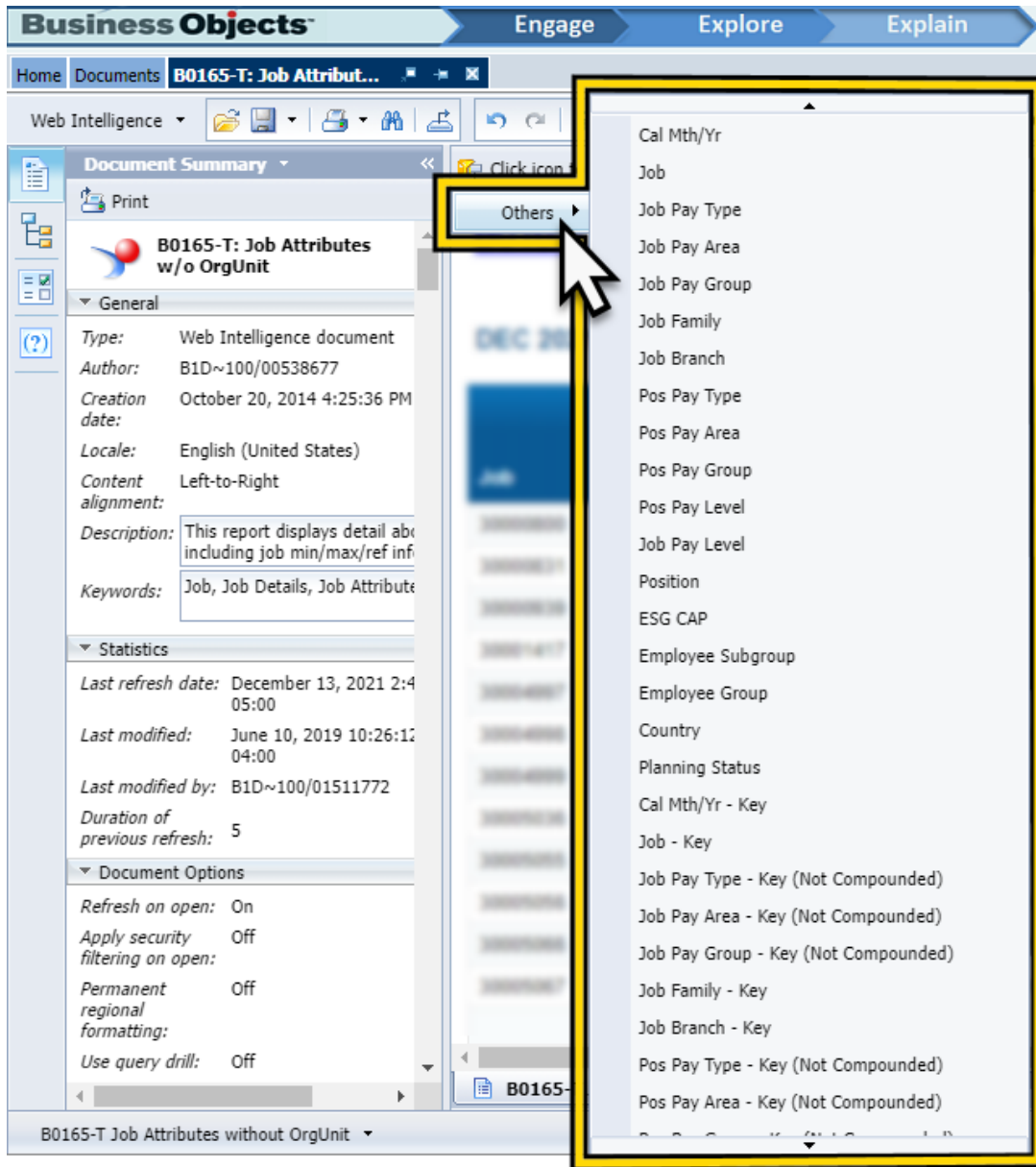
1. Click on **Filter Bar**. This adds another sub menu at the bottom of the basic menu bar.
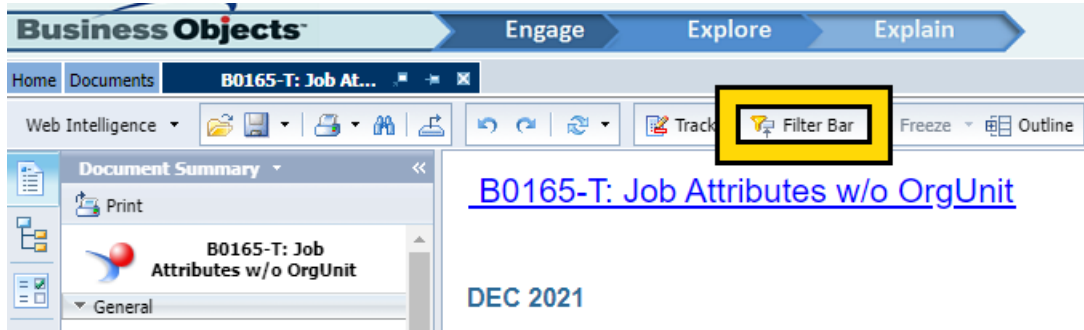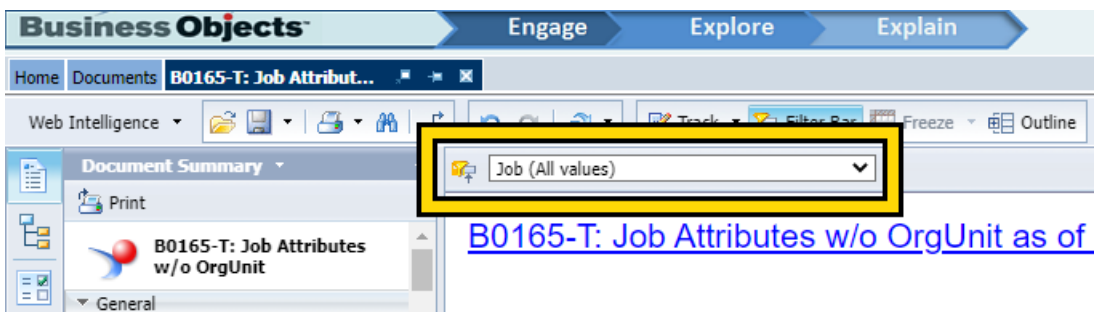

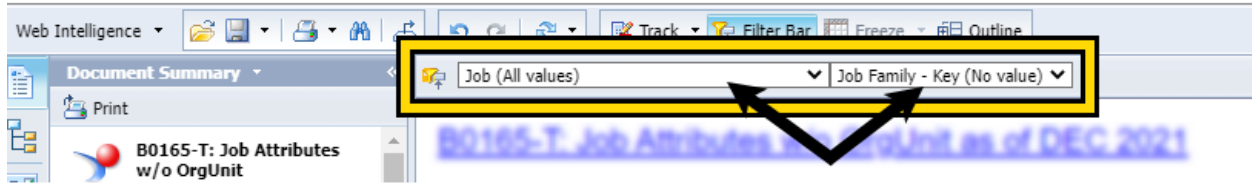2. Click on the key icon on the new filter bar to add a filter.

3. Click on Other to see the list of available data elements.

4. Click on the **data element** to filter (we are using **Job** in this example).

5. The Job data element is now added to the filter bar as an item that can be used for filtering. Additional data elements can be added by repeating the same sequence.

6. Use the drop-down box and select the data values to filter to apply the filter.
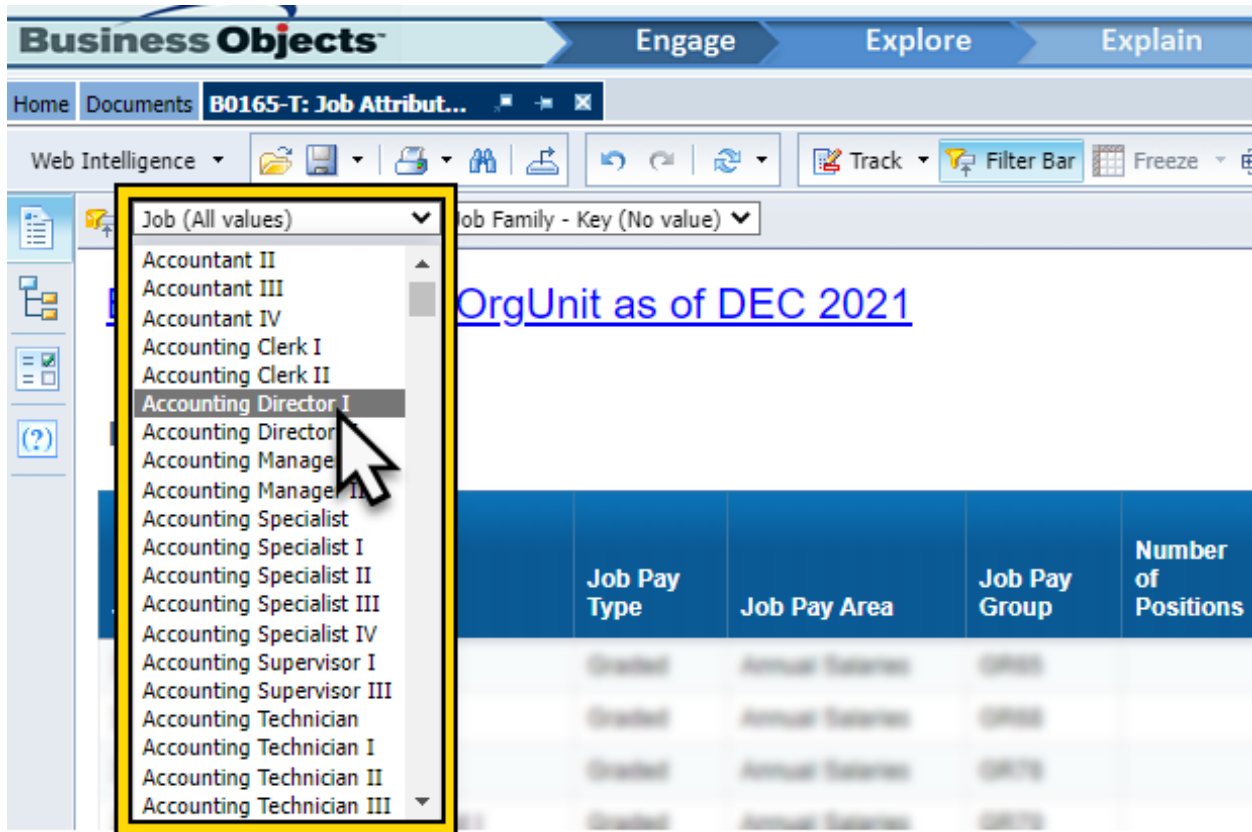
7. Once the filter has been applied, the rows of data not contained in the filter are hidden from view.

8. Filters can be applied only to data that is contained within the WEBI report structure. Ensure that the data element is displayed in the report layout before adding it to the filter bar, otherwise the filter will be empty, and no values can be selected. A filter can be removed from the bar by clicking on the drop down and clicking remove.

Filters in Design Mode

Filters applied in design mode are more flexible and powerful than in reading mode.
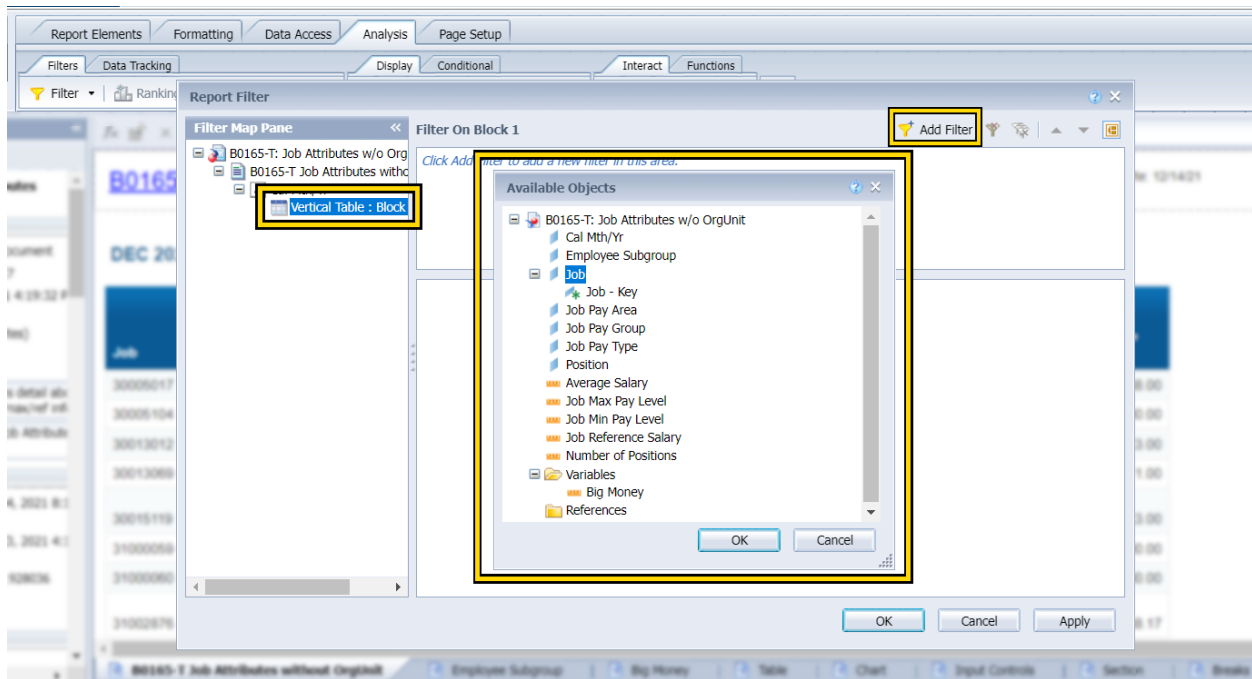
Filters applied from the tool bar in design mode

1. Change the WEB Intelligence Report to Design mode.

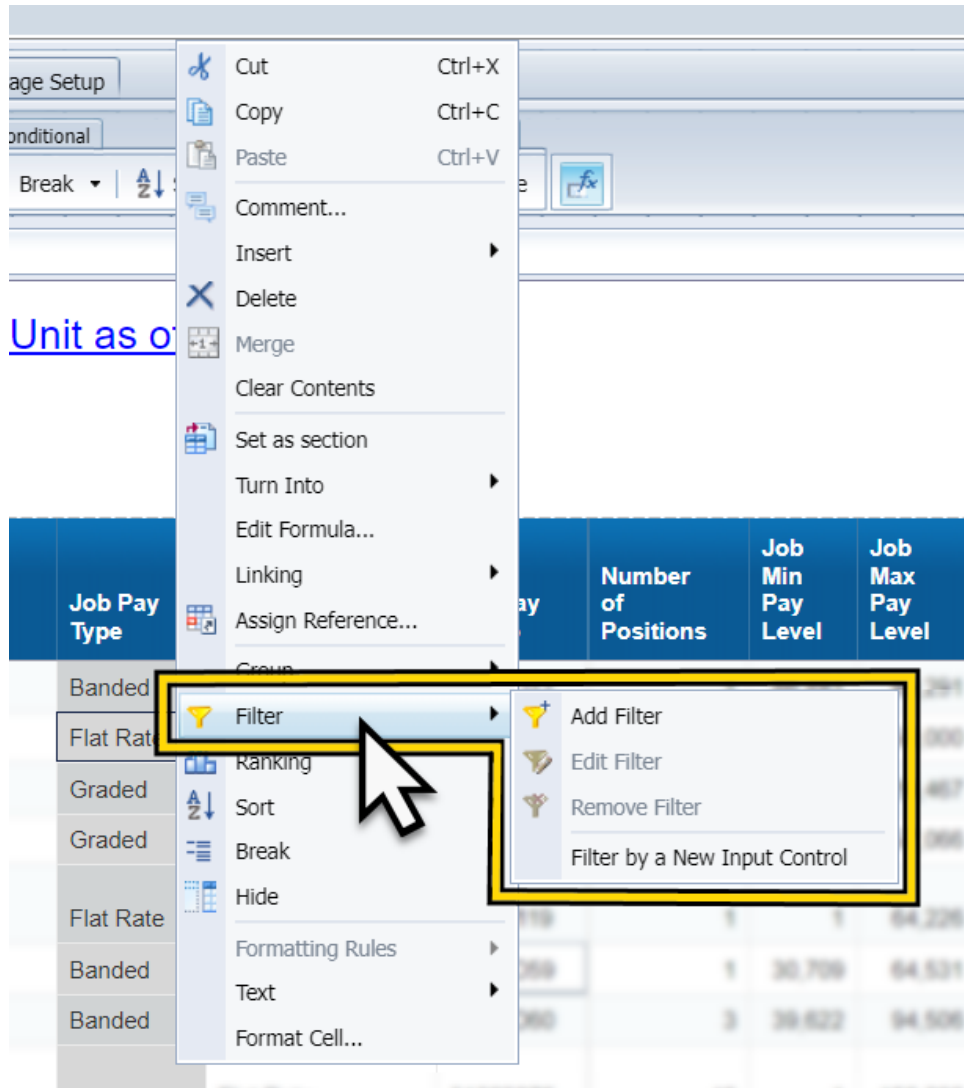2. Select the Analysis Report menu tab and then the filter tab.
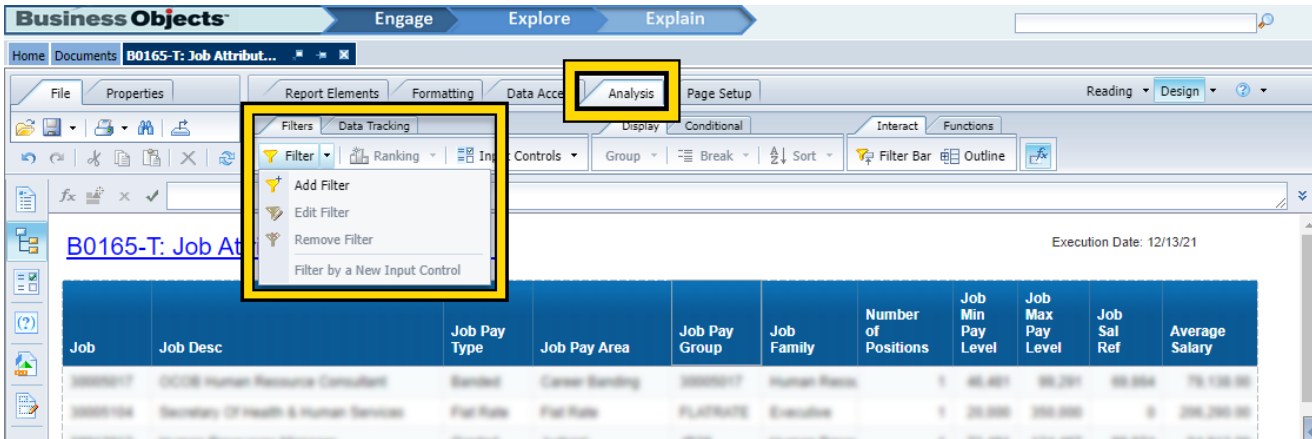
3. Click the Filter Icon and then left click Add Filter.

Filter from Context menu

1. Click the left mouse button in the data cell of desired filter column.

2. Click the right mouse button in the desired filter column and locate the Filter icon half way down the context menu.


3. Click Add Filter to apply a new filter to the report.

Input Controls

- Input controls provide a convenient, easily accessible method for filtering and analyzing report data.
- When you select values in the input control, you filter the values in the associated report elements by the values you selected.
- You can use input controls to analyze different scenarios by changing the value of variables.
- Input controls are report specific.
- They are grouped on the Input Controls tab on the Side Panel.

- You can use input controls on hierarchical data, e.g., Org Unit.
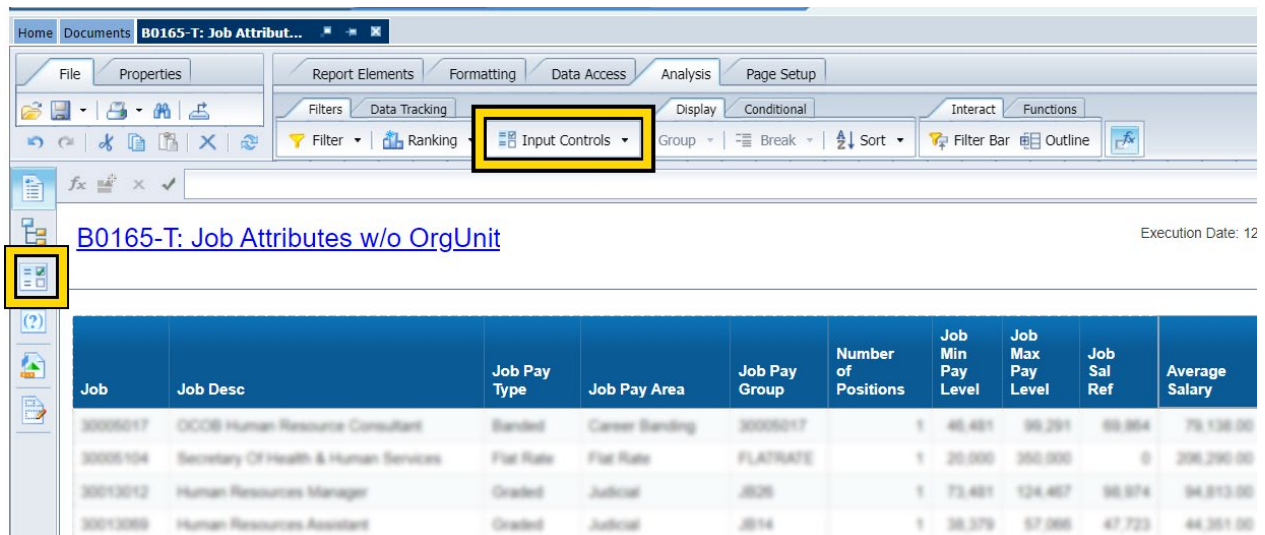
Add an input control in the Analysis tab:

1. In design mode, select the Analysis tab from the tool bar

2. Select the Filters sub-tab

3. From the Input Controls dropdown list, select Define Control. Alternatively, choose New from Input Controls side panel.
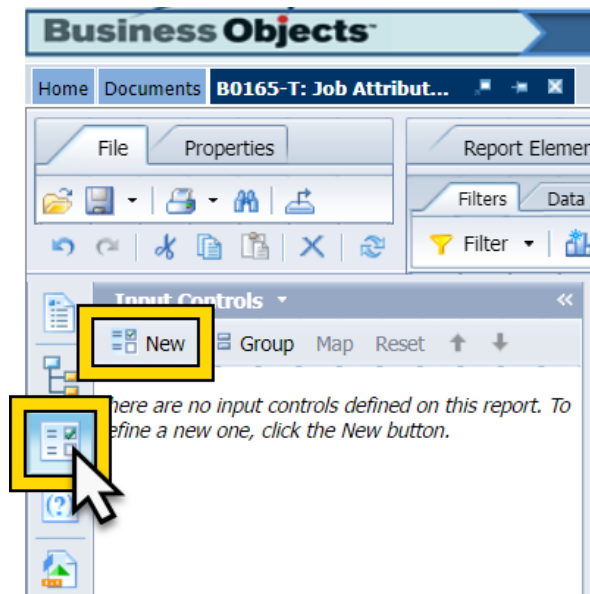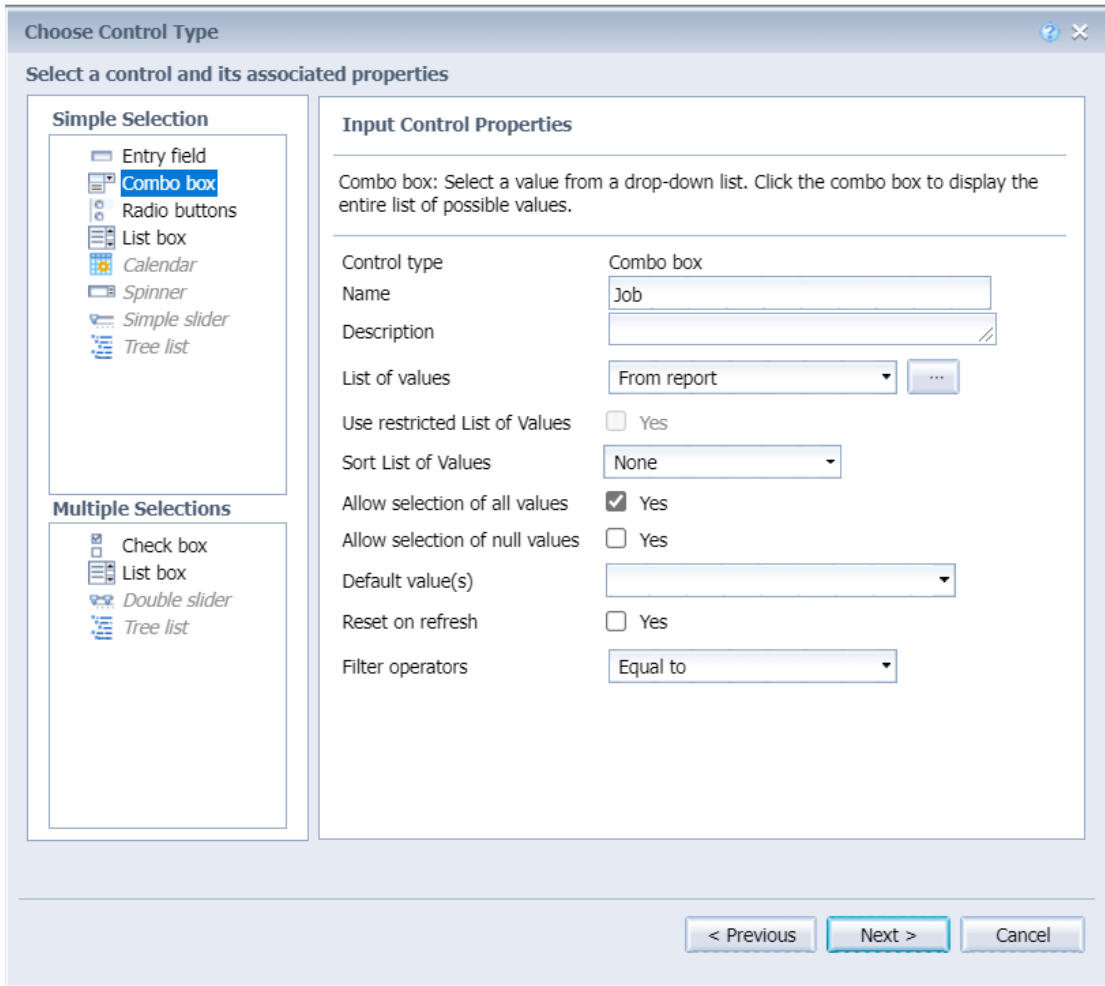
4. Select a characteristic dimension or a measure on which the filtering will be done and choose Next. Only the report elements selected in the report will be available for the selection.
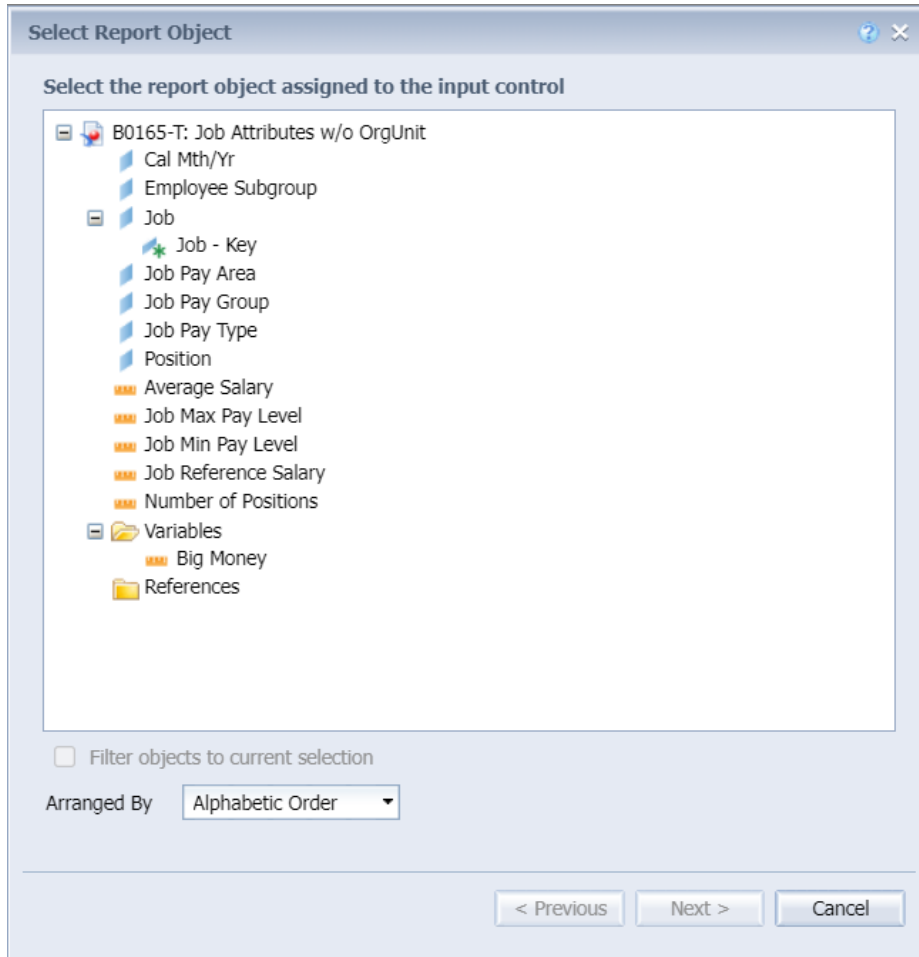
5. On the next screen, Control Types available for selection are:

- Simple Selection – Entry Field, Combo Box, Radio Button, and List Box

- Multiple Selection Controls – Check Box, List Box

When a key figure measure is selected for selection control, the control types available for selection are:

- Simple Selection – Spinner, Single slider

- Multiple Selection Controls – Double slider

6. Input controls can be associated with the report elements such as page or section headers, body, or footers.
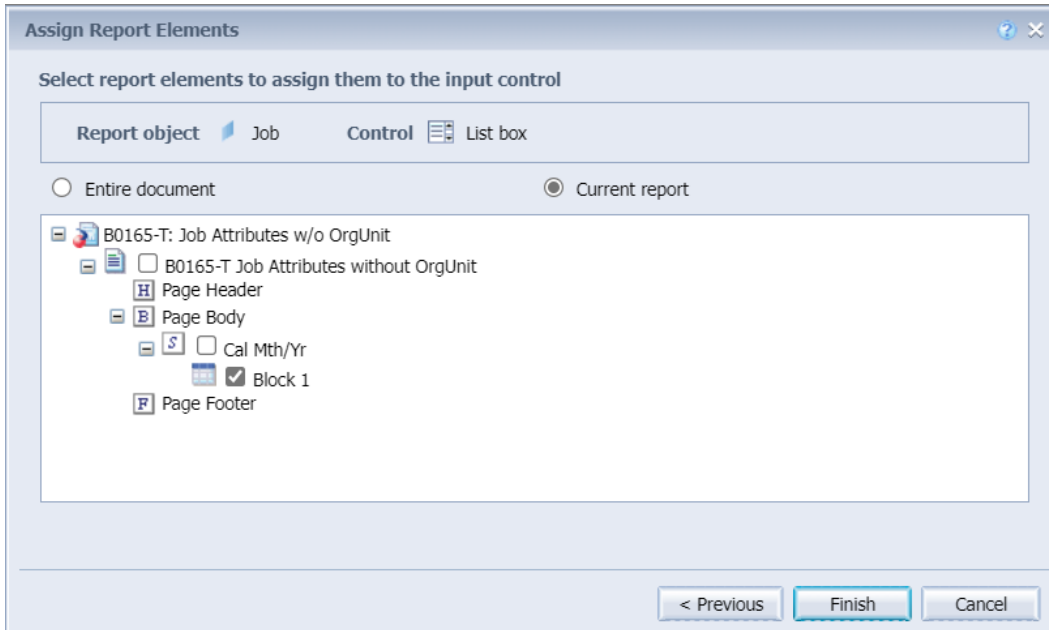
7. Click on Finish after leaving the default selection untouched.

- Input controls are report specific. They are grouped on the Input Controls tab on the Side Panel. You can open the side panel Input control to view in case the side panel is closed, or you are in some other panel.
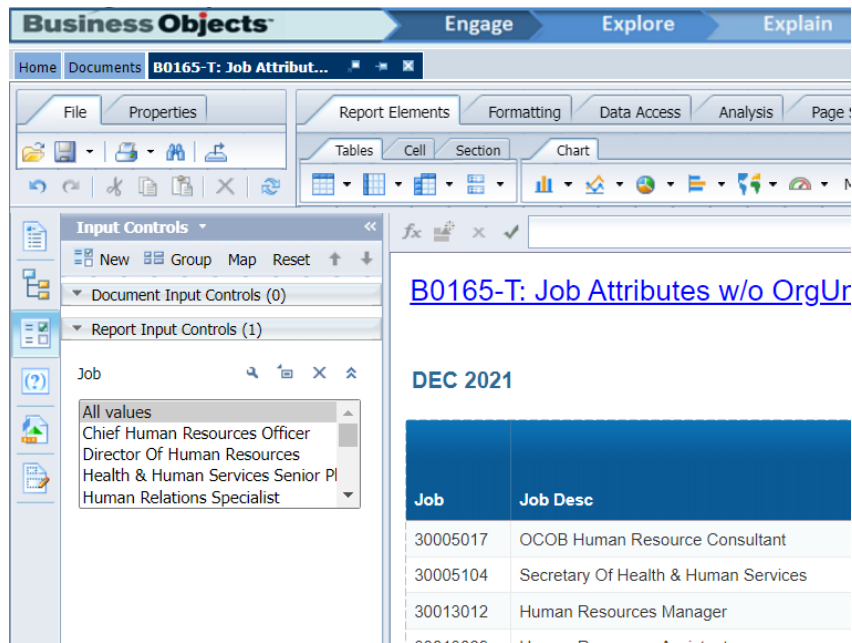
Selection of one or more values in the input control selection and pressing ok will result in applying the filter criteria to the result in the report.

Multiple input controls can be applied within a report.

Change Record

- 2/4/21 – Updated format, assigned reference number, and made accessible – C. Ennis
- 12/15/21 – Updated screenshots, added alt text, and updated instructions to active voice L.-Lee