Creating Filters and Table Prompts

This guide will cover:

- How to add a basic filter to an analysis
- How to create a table prompt for an added filter

Adding Filters to an Analysis

Step One

Hover over the Open icon in the Global Header and locate the analysis you wish to add a filter for. Or use the Catalog to locate the analysis and click the Edit button.
Step Two

Navigate to the Criteria Tab of the Analysis Editor.

Step Three

To add a filter, click on the properties icon of a desired selected column and select the Filter option.

OR

Click the Add Filter icon and select an available column or select More Columns... for more options within the selected Subject Area. The More Columns allows you filter on items that are not displaying within a view of the analysis (e.g. the Table view).

Expand the Operator dropdown in the New Filter prompt window to change how the filter will operate.

Expand the Value and select the desired value(s). Values can be typed in this field; however, they must match exactly in order for the filter to work properly.

Note: The binoculars icon can be used to search for specific values.
Once the desired value(s) have been selected click the OK button. Repeat this step as necessary.

Note: Filters can be edited by hovering over the filter located within the Filters section after it has been added.

Based on the subject area and filters selected, the query in this screenshot will retrieve all students currently active in a program (e.g. Arts & Science Baccalaureate, UCBA Associate) that has an Academic Plan of Chemistry-BS or Chemistry AA.
Step Five

Click the **Results** tab, to view the results of the analysis.
Creating a Table Prompt

Users will have the ability to create an optional table prompt which will allow a viewer to toggle between values within an identified column. For example, the query used in this document queries all students with an active academic plan of Chemistry – BS or Chemistry – AA. A user may want to separate the two majors without creating a separate table.

Step One

To create a table prompt, be sure you are on the Results tab then click the Edit View icon for the Table view.

Step Two

Locate the desired column you wish to create the prompt for and drag it into the Table Prompts area of the Layout pane. It is not necessary for this column to have any filters associated with it.
**Step Three**

Click the **Done** button to close the table view editor then click the **Save** icon to completely save your changes.

Use the **Preview** icon to see how your results will display or navigate back to the Catalog and use the **Open** button to run the report. With the newly added table prompt, you will be able to toggle between the values available in the selected column.

You have now completed the steps for adding a basic filter and creating a table prompt.