

# Fast•Class File

Client Data System

## Volume 42: Filtering for the Half

One way of searching for contacts that will reach a specific age in the next six months is to create a dynamic report with two filters: one filter to find all contacts of a specific age and a dated filter to find all contacts with a birthday in the next six months. Both sets of criteria can be combined in one filter, however, separating the criteria into two separate filters allows for greater flexibility should the same criteria be needed for future data mining.

To build a filter that will search for all contacts of a specific age –

- Select **View** in the main menu.
- Select **Filters**.
- Perform an open search to open the **Filter Summary**.
- In the **Filter** summary, click the **Add** button.
- In the **Table Names** window, select **Contact Information**.

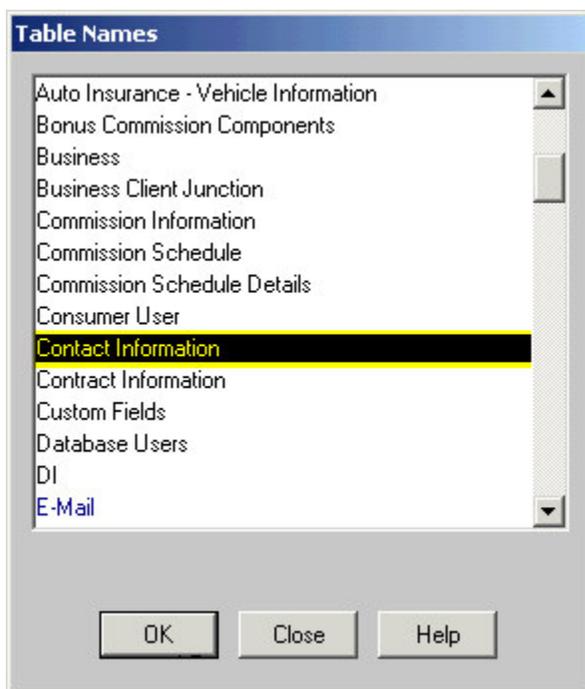


Figure 1: The Table Names window (Contact Information selected).

- In the **Filter Criteria** window, select the **Age** column in the **Column Name** drop down, enter the desired age (**64** in this example) in the **Value** field, and select the **Equal** option in the **Operation** section.
- Click the **Add** button.

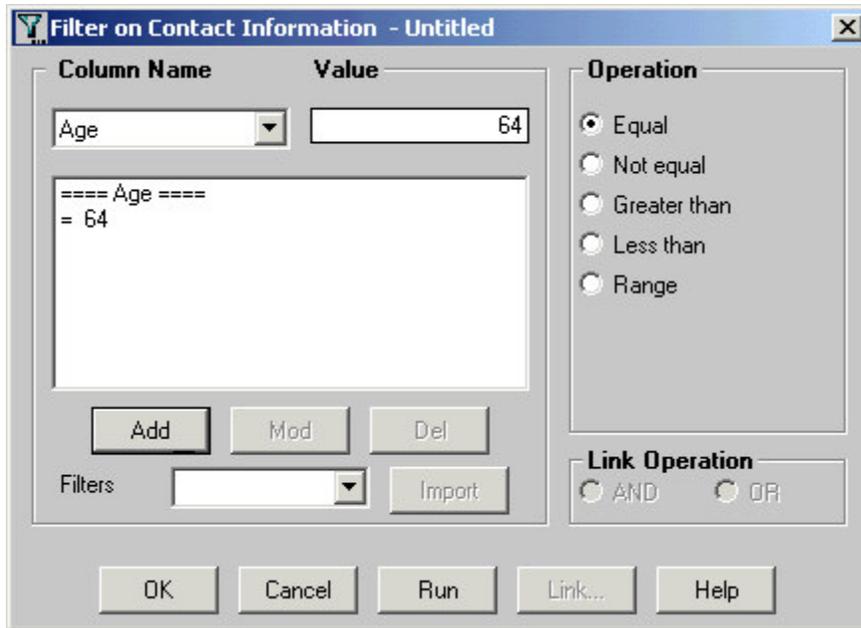


Figure 2: The Filter Criteria window (Criteria added).

- To test the filter, click the **Run** button.
- Click **OK**.
- Give the filter a name. Add a description if necessary.

To build a filter that will search for all contacts with a birthday in the next six months –

- Select **View** in the main menu.
- Select **Filters**.
- Perform an open search to open the **Filter** Summary.
- In the **Filter** summary, click the **Add** button.
- In the **Table Names** window, select **Contact Information**.
- In the **Filter Criteria** window, select the **Birth Date** column in the **Column Name** drop down.
- Click the **Add** button.
- Select **Day Operations** in the **Date / Day Operations** section of the **Date Filter Operations Selection** window.
- Enter **180** in the **Days** field (to approximate six months), select the **Next Days** option, and select the **Ignore Year** option. If the **Ignore Year** option is not selected, the filter will not search for the anniversary of birthdates, but the actual birthdates. Select the **Ignore Year** option to ensure that the filter will search for birthdays as opposed to birthdates.

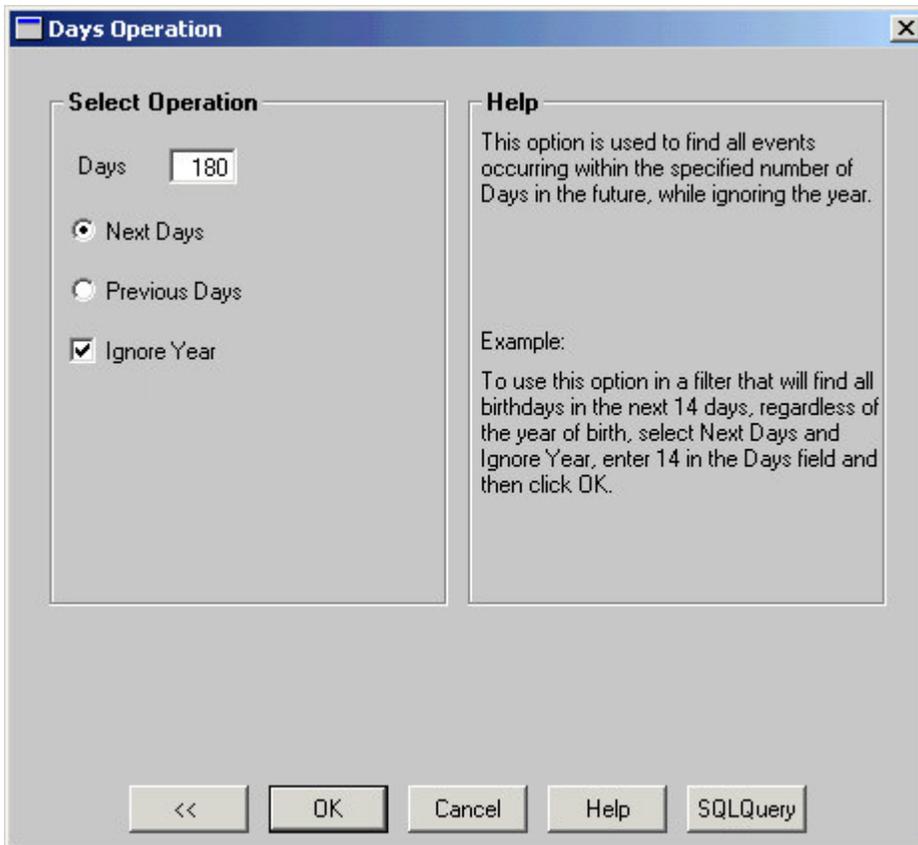


Figure 3: The Days Operation screen (criteria added).

- Click **OK**.
- To test the filter, click the **Run** button.

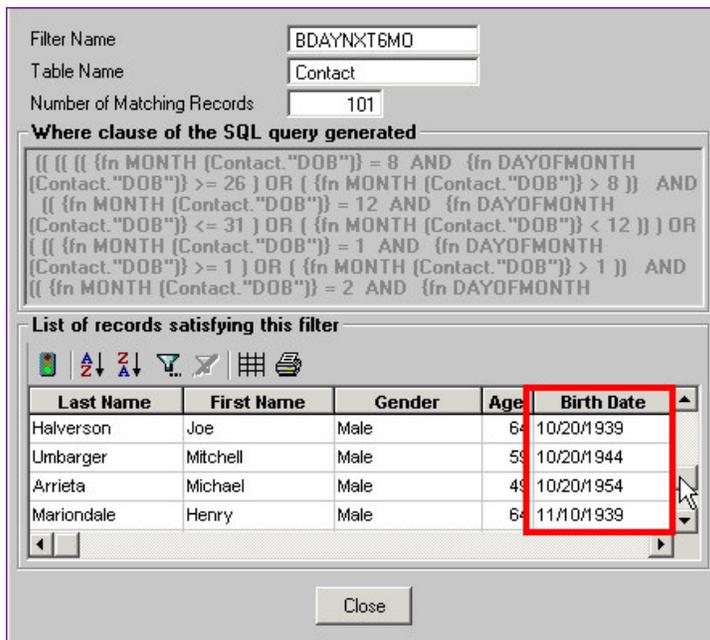


Figure 4: The Filter Criteria test window (data for birthdays in next six months).

- Click **OK**.
- Give the filter a name. Add a description if necessary.

To add filters to a dynamic report to find all contacts who will turn 65 in the next six months –

- Select **Reports** in the main menu.
- Select **Dynamic Reports**.
- Perform an open search to open the **Reports** summary.
- Click the **Add** button.
- Select the **Contact Information** table in the **Select Primary Table** window.

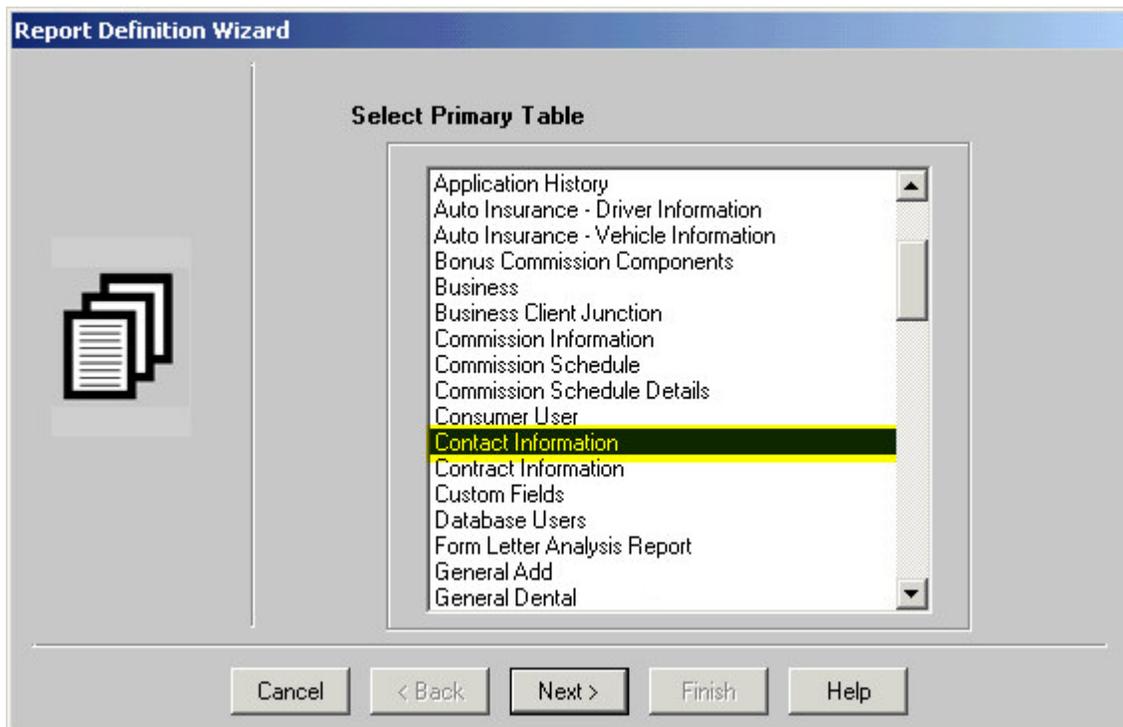


Figure 5: The Select Primary Table window (Contact Information selected).

- Select columns for display in the report in the **Report Column Definition** window.

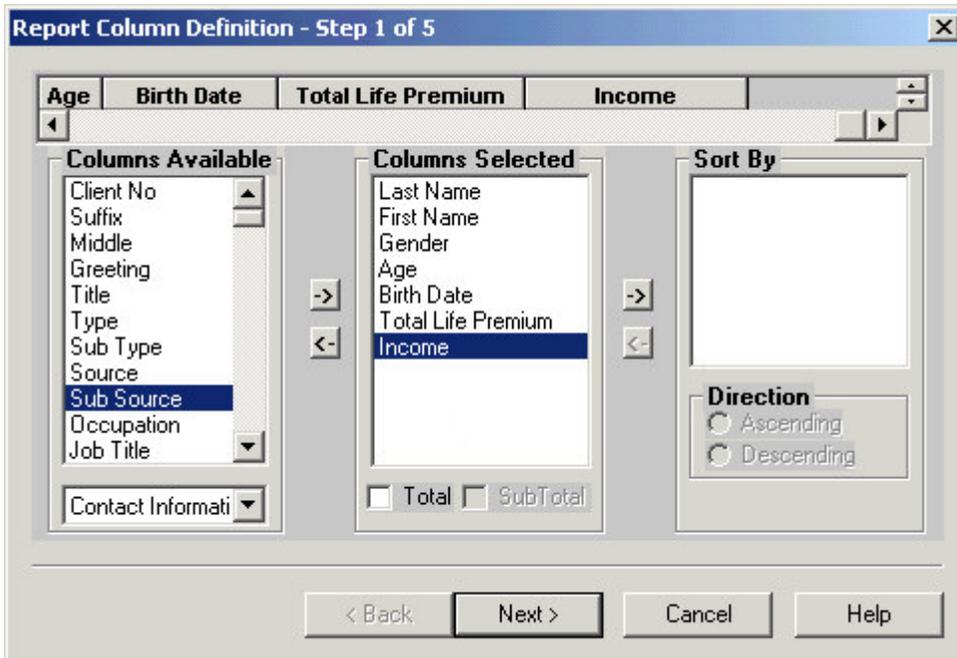


Figure 6: The Report Column Definition window

Columns can be added to the **Columns Selected** section by selecting the column in the **Columns Available** section, then clicking the **Arrow** button pointing toward the **Columns Selected** section, or by double-clicking the entry in the **Columns Available** section. Columns can be moved out of the **Columns Selected** section in the same fashion.

- Use the **Filter** drop down fields in the **Selection Criteria** window to add the filters to the dynamic report.

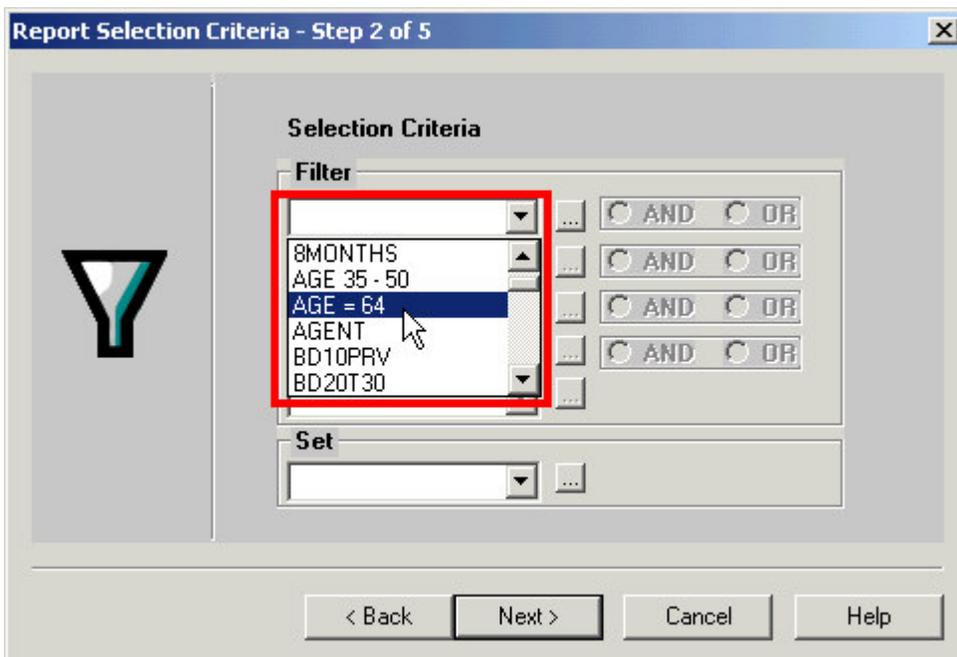
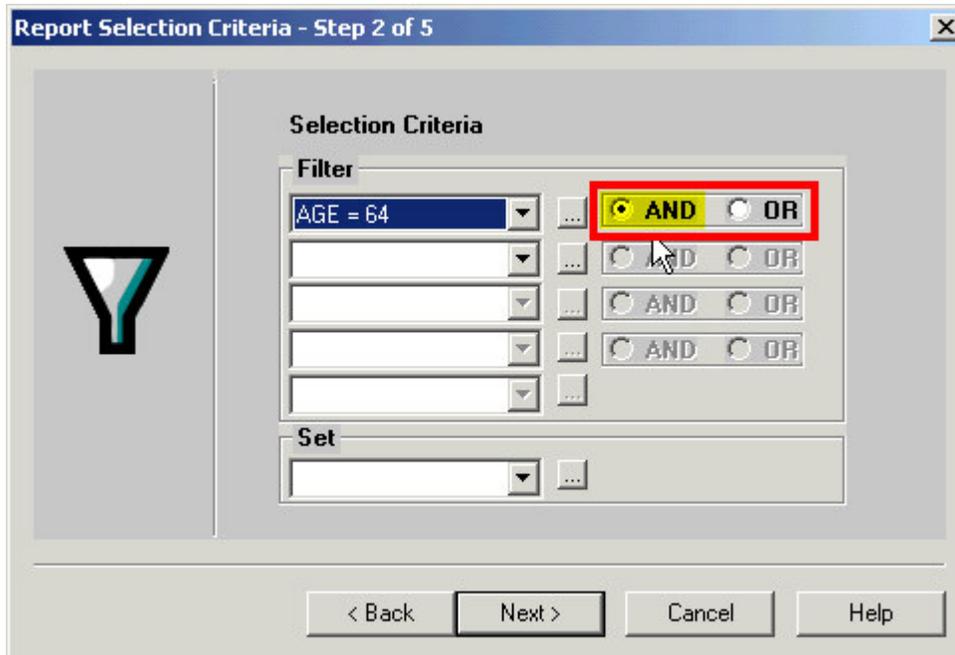


Figure 7: The Selection Criteria window (Filter drop down active).

Filter availability in the **Filter** drop down fields will be determined by primary table selection in the **Select Primary Table** window. For example, if the **Contact Information** table is selected as the primary table in the **Select Primary Table** window, filters built on the **Contact Information** table will be available in the Filter drop down fields of the **Selection Criteria** screen.



**Figure 8: The Selection Criteria window (And and Or operators active – And operator selected).**

When a filter is selected in a **Filter** drop down, the filter operators become active. The filter operators refer to the next filter added (if applicable). Selecting the **And** operator will ensure that report results include records that meet criteria for the filter with the operator and the following filter. Selecting the **Or** operator will ensure that report results include records that meet the criteria of the filter with operator or the criteria of the following filter.

- Apply settings as needed in the **Select Output Type** and **Spreadsheet Output Settings** windows.
- Give the report a name in the **Report Package Description** window.

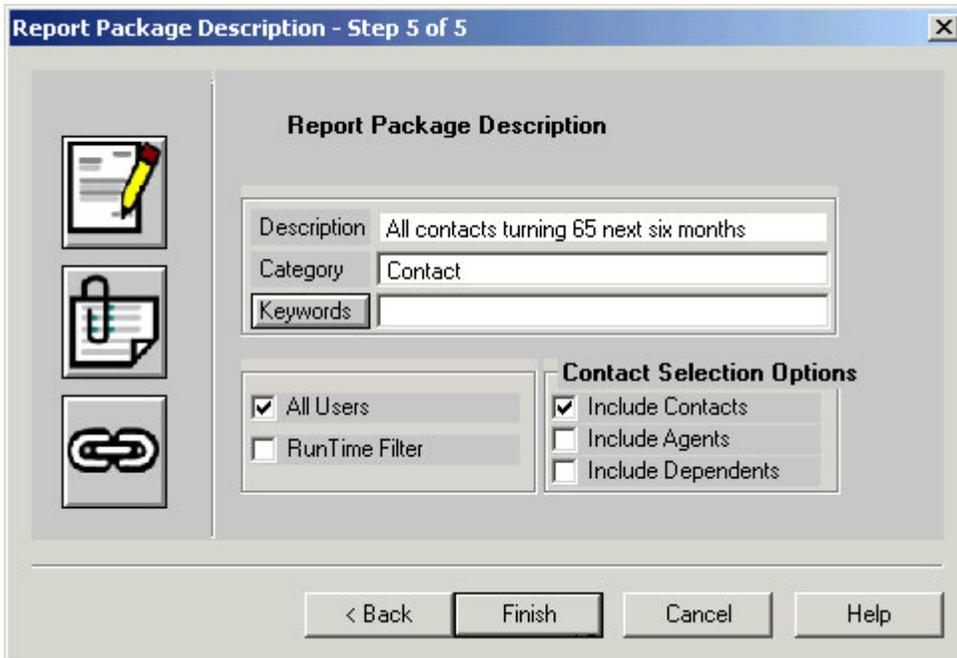


Figure 9: The Report Package Description window.

- Click **Finish**.
- The new report will be automatically highlighted in the **Report** summary screen.
- With the report highlighted, click the **Run** button.

	Last Name	First Name	Gender	Age	Birth Date
<input checked="" type="checkbox"/>	Bartelo	Frank	Male	64	01/15/1940
<input type="checkbox"/>	Halverson	Joe	Male	64	10/20/1939
<input type="checkbox"/>	Hasnain	Amir	Male	64	02/11/1940
<input type="checkbox"/>	Mariondale	Henry	Male	64	11/10/1939
<input type="checkbox"/>	Meresman	Michael	Male	64	02/01/1940
<input type="checkbox"/>	Mineo	David	Male	64	11/28/1939
<input type="checkbox"/>	Nelson	Yolanda	Female	64	09/10/1939
<input type="checkbox"/>	Nimersheim	Gene	Male	64	08/30/1939
<input type="checkbox"/>	vVolton	Peter	Male	64	01/02/1940
<input type="checkbox"/>	Drake	Frank	Male	64	01/12/1940
<input type="checkbox"/>	Polster	Karen	Female	64	12/25/1939
<input type="checkbox"/>					

Figure 10: Results of a dynamic report displaying all contacts who will turn 65 years old in the next six months.