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Fast•Class File

Client Data System

Volume 86: Dynamic Report Overview: Filters

Filter Creation

There are three pieces of information that you will need in order to build a filter:

- The **location** of the data
- The **data** to be filtered on
- The **relationship** of the data to the filter

Location = Column

The location of the data refers to the field that data is stored in. When creating a filter, the location will be referred to as the **Column**, since data in CDS is stored in Tables and Columns. Some examples include the **Type** or **DOB** fields of contact records.

Data = Value

The data will be filtered on is the actual data in the field. The data is referred to as the **Value** when creating a filter. **Prospect** is an example of a **Value** that could be entered in the **Type** field.

Relationship = Operation

The relationship of the filter to the data will define how the filter operates. Thus, the relationship is referred to as the filter **Operation**. An example of filter operation is **Equal To**.

Creating a Filter

- Click on **View** in the main menu bar.
- Click on **Filters** in the **View** menu.
- Perform an open search to open the **Filter List** summary.
- Click the **Add** button in the **Filter List** summary.
- Select the **Table** where the **Column**, which will be included in the filter, is located.

Note: As you work in CDS, you will become more familiar with Table and Column relationships.

- After selecting the table click **OK**.
- CDS will open a **New Filter** window.

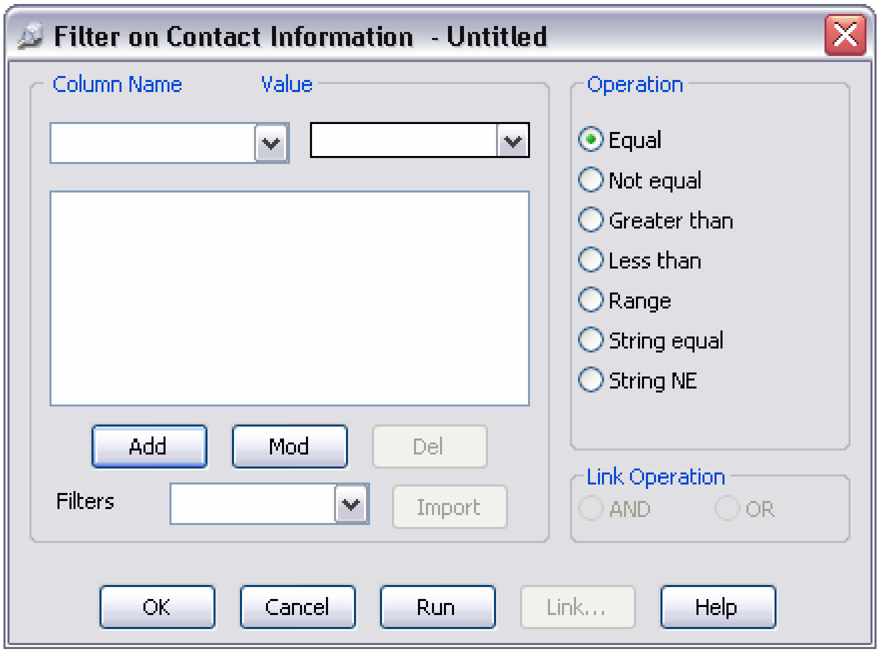

Figure 1: New Filter window.

- Use the **Column Name** field to select the column.
- Define the value in the **Value** field.
- Select the operator in the **Operation** section.
- Click the **Add** button to add the filter criteria to the filter.
- To test the filter, click the **Run** button. You will be prompted to give the filter a name and description.
- After testing the filter, click **Close**.
- Click **OK** to confirm the Filter name.
- The new Filter will be saved in the Filter list summary and can be used in filtered searches, to define set membership, or in data mining as part of a Dynamic Report.