



How to use Advanced Report Filtering (QRG)

1. Advanced Report Filtering

You can filter reports to show specific groups of data using single and multi-level filters together with both AND and OR operands.

- Each level can be
 - Either AND or/and OR
 - AND means that all conditions must be true
 - OR means that any condition can be true
 - Contain either single or grouped rules
- Single rule permits
 - Selection of a field
 - Selection of an operator
 - Operators are based on the type of field selected as outlined in the table below.
 - Entering of a value (or values) for that operator
- Group rules permit
 - Fully nested 'levels' so can be exactly as defined for above.
- Operators

	Date	Dropdown	Text	Number
Between	X			X
Not Between	X			X
Equal	X	X	X	X
Not Equal	X	X	X	X
Less	X			X
Less or Equal	X			X
Greater	X			X
Greater or Equal	X			X
Begins With			X	
Ends With			X	
Contains			X	



Example 1 - to filter for an organisation with NHS in the title AND based in North Central or North East London the filter below would be applied.

The screenshot shows a 'Set filters' window with a blue header. Below the header, there are two main filter groups connected by an 'AND' operator. The first group has a dropdown for 'Name' with the operator 'contains' and the value 'NHS'. The second group is connected by an 'OR' operator and contains two sub-groups: one with 'Region' equal to 'North Central London' and another with 'Region' equal to 'North East London'. Each filter rule has a '+ Add rule' button, an 'Add group' button, and a 'Delete' button.

Example 2 – Filter for an ISA with

- a. Title starting with Yellow AND
- b. Either
 - i. Started last year OR
 - ii. Started this year AND is in North Central London

The screenshot shows a 'Set filters' window with a blue header. Below the header, there are three main filter groups. The first group has a dropdown for 'Title' with the operator 'begins with' and the value 'Yellow'. The second group is connected by an 'AND' operator and contains a 'Start Date' filter with the operator 'between' and dates '01/01/2017' and '31/12/2017'. The third group is connected by an 'OR' operator and contains two sub-groups: one with 'Start Date' greater or equal to '01/01/2018' and another with 'Host Org Region' equal to 'North Central London'. Each filter rule has a '+ Add rule' button, an 'Add group' button, and a 'Delete' button.