

## Filtering - Tips

**Objective:** Make use of filters for isolating and displaying records of your choice.

**Overview:** Most “listing” frames contain a FILTER area at the top of the frame. The filter area is composed of 5 items:

The screenshot shows the CME Web Tracker interface. At the top, there's a navigation bar with tabs: General, Speaker, Credits, Registered, Listing (selected), and Reports. Below the navigation bar, there's a status bar showing '22,502 People' and '12,059 Filtered' (circled in red). To the right of the status bar, it says 'Last Name' Sort and '710 Pages'. Below the status bar, there's a filter area with a dropdown menu showing 'Filter By: Test Filter'. Below the dropdown is an input field containing '{Title}MD'. To the right of the input field are three icons: a binoculars icon labeled 'Find Filter', a trash can icon labeled 'Clear Filter', and a checkmark icon labeled 'Set Filter'. Below the filter area is a table with columns: Peo, CME ID, First Name, Last Name, Title, Gender, and Affiliation. Red arrows point from text labels to these elements: 'Filter By' points to the dropdown, 'Filter Input Field' points to the input field, 'Find Filter' points to the binoculars icon, 'Clear Filter' points to the trash can icon, and 'Set Filter' points to the checkmark icon.

1. “Filter By:”
  - a. Displays the name of the active filter
  - b. When clicked, presents a popup to select field(s) to filter by
2. Filter Input Field
  - a. Input area displays field and criteria when a field below is double-clicked
  - b. Input area displays field when a field is selected from popup
  - c. Input area is a location to manually build filters by typing in fields and criteria
3. “Find Filter” binoculars icon
  - a. When clicked, presents a popup to display existing filters
  - b. Add and Delete filters from the popup accessible through the “Find Filter” binoculars
4. “Clear Filter” icon
  - a. Clears the Filter Input Field of all content, resulting in display of all records.
  - b. Cannot clear any filters with name beginning with an asterisk (\*)
5. “Set Filter” icon
  - a. Activates a filter
  - b. Limits view to only filtered records

**Note:** Tab bar displays the number of items filtered. Export to spreadsheet respects the boundaries of a filtered view in the listing frame. Reports can be printed by filtered view.

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**Defining a filter:** There are 4 different ways to define a filter:

1. Click twice on an example that meets your filter criteria in the listing frame below.
  - a. Locate a record that meets your filter criteria
  - b. Click twice on the actual data to specify field and value
  - c. Filter criteria will be displayed in Filter Input Field and filter will be set, resulting in a listing view of only the records that meet the filter criteria.
  
2. Select field(s) from the "Filter By" popup
  - a. Click "Filter By"
  - b. Popup will be presented
  - c. Double Click on field to select
  - d. Field will be displayed in Filter Input Field
  - e. Type in your criteria
  - f. Click "Set Filter" icon to set the filter, resulting in a listing view of only the records that meet the filter criteria.
  
3. Select a filter from the "Find Filter" popup
  - a. Click "Find Filter" binoculars
  - b. Double Click on desired filter
  - c. Filter contents will be displayed in Filter Input Field and filter will be automatically set, resulting in a listing view of only the records that meet the filter criteria.
  
4. Type field(s) and criteria in the Filter Input Field
  - a. Type the name of the field, surrounded by French braces { }
  - b. Type the criteria after the name of the field
  - c. Click "Set Filter" icon to set the filter, resulting in a listing view of only the records that meet the filter criteria.

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**General Filtering Rules:** Following are some basic rules to follow when defining a filter. Keep in mind that if your filter is not syntactically correct, an error will be displayed

**QUOTES** - Use quotes to surround any criteria that has a space within. (i.e. "Your Health"). Quotes must also be used when your criteria contains punctuation. Quotes cannot be used with wildcards and must be used only with literal text. (i.e. "MD, FACP") The use of quotes assures you that records meeting your specific criteria will be viewed.

**CASE SENSITIVITY** – All filters are case sensitive unless you are using "wildcards" in your definition.

**NARROW FILTER** – A "narrow" filter would use exact spelling, letter case and quotes to view specific records.

**BROAD FILTER** – A "broad" filter would use wildcard operators and disregard specifics in order to view records that would approximately meet your criteria.

**OPERATORS** – An operator is a symbol that establishes criteria. (i.e. < or >). Operators can only be used on fields that would respect the functionality of the operator. (see operators below).

**WILDCARDS** – Although wildcards can be used to broaden your view of records, the .. operator can only be used at the end of a word.

**CHANGING OR DELETING RECORDS** – You can use the filtering functionality to isolate records that you wish to change or delete. If changing or deleting records globally, plan ahead in order to assure that you will obtain the expected results. In any case, if the results are in question, be sure you have a current backup in place prior to making the change.

**SPACES** – Spaces are not necessary between the field and the criteria, but can be used.

**EQUAL TO** – Typing criteria after a field is the same as using "equal to" or = when defining criteria for fields that apply. However, if you intend to ASSIGN a value to a field, you must use =.

**Note:** Feel free to share your filter plan, prior to setting the filter, with a member of the CME Web Tracker SE Support Team, if the expected results are in question.

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**Operator, as defined by Webster:** "Something and especially a symbol that denotes or performs a mathematical or logical operation"

**Operators available to define your filters:** The following operators can be used when defining filters:

**Wildcard Operator** - A "wildcard" operator can apply when defining a filter. The .. specifies any group of characters that are unknown.

Example: {Affiliation}You..

Specifies an affiliation that is spelled Y-o-u with unspecified letters after the You.

The "." wildcard operator is used for a broad filter, with the expectation that the results will contain any records that contain the first letters in the field specified.

**Note:** The "." wildcard operator cannot be used within quotes

The "." wildcard operator is not allowed in numeric or date fields in filters. Furthermore, this operator is allowed after the filter condition, but not before it. For example, you can type "MD.." to filter for all values that contain the letters "MD" (either upper or lowercase) followed by any other letters. This filter returns the values "MD", "MD, FACP", "MD, PhD" and so on. Using the "." wildcard is the only way to define a case-insensitive filter.

**NOT** - can be used to exclude records that are NOT something

**{Field}not Example1,not Example2,not Example3**

Or

**{Field}not Example1,not Example2{Field 2}not Example1**

**{Title}not MD..,not DO..**

Will result in viewing all people who do not have these titles

**{Title}not MD..{Affiliation}not You..**

Will result in viewing all people who do not have a title beginning with MD and who are not affiliated with a hospital called Your Hospital (or anything that begins with YOU)

**{Title}not MD..{Affiliation}You..**

Will result in viewing all people who do not have a title beginning with MD and who are affiliated with a hospital called Your Hospital (or anything that begins with YOU)

## Filtering - Tips

### Operators (Continued)

**OR** - can be used to include records that meet multiple criteria

**{Field}Example1 or Example2 or Example3**

**{Title}MD.. or DO..**

Will result in viewing all people who have either of these titles

**{Title}MD.. or DO..{Affiliation}You.. or My..**

Will result in viewing all people who have a title beginning with MD or DO and are affiliated with a hospital called Your Hospital (or anything that begins with YOU) OR a Hospital called My Hospital (or anything that begins with My)

**{State}TX or MN or WA or NY or VA or GA or FL**

Will result in viewing all people who have a state of Texas, Minnesota, Washington, New York, Virginia, Georgia or Florida

**Comma** - functions as the AND operator for top-level conditions such as >200, <300.

However, in a filter, the **AND** operator must be used instead of a comma to express more complicated conditions such as (>100 AND <200) OR (>300 AND <500). The general rule is that you must use **AND** when the condition is within parentheses.

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### Operators (Continued)

**Comparison Operators** - A "comparison" operator when filtering is used to target records that meet the criteria of being "greater than", "less than" or "equal to" a particular item. This can be useful with isolating records that fall after a date or between two dates.

#### > greater than

is typically used to isolate records after a certain date or greater than a certain number. For instance, if you want to view all events that took place after 1/1/2006, you would type:

{Event Date}>1/1/2006

Note that the group filtered will not include the 1/1/2006 date specified, but dates AFTER that.

#### >=greater than or equal to

If you choose to include the date specified, you would type:

{Event Date}>=1/1/2006

#### < less than

is typically used to isolate records before a certain date or less than a certain number. For instance, if you want to run a view all events that took place before 1/1/2006, you would type:

{Event Date}<1/1/2006

The result would be that all events that took place before this date would be viewed in the listing frame.

Note that the group filtered will not include the 1/1/2006 date specified, but dates BEFORE that date.

#### <=less than or equal to

If you choose to include the date specified, you would type:

{Event Date}<=1/1/2000

#### >=greater than or equal to

If you choose to include the date specified, you would type:

{Event Date}>=1/1/2006

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## Operators (Continued)

**Special Operators** - A "special" operator when filtering is used to target for special cases.

### **Today**

is typically used to test for records that contain today's date.

#### **{Event Date}Today**

Will result in viewing events that take place today.

#### **{Event Date}<Today**

Will result in viewing events that take place before today.

#### **{Event Date}>Today**

Will result in viewing events that take place after today.

### **Blank**

is typically used to test for records that have a blank field value

#### **{Event Date}Blank**

Will result in viewing events that have a blank event date

#### **{State}Blank**

Will result in viewing people who have a blank state field value

#### **{State}not Blank**

Will result in viewing people who do NOT have a blank state field value

### **| (Pipe)**

is only used to specify a filter action which follows the | symbol

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**Filter Actions:** A “Filter Action” is used to specify an action to take that will change your data. Since filter actions will actually change data, you will want to proceed to use with caution.

**Note:** A | character must be used to specify a filter action to the field values preceding the | character. A function will follow the | character.

**FILTER ACTIONS WILL RESULT IN THE LOSS OF DATA IN THE FIELD SPECIFIED, OR THE LOSS OF AN ENTIRE GROUP OF RECORDS. IT IS HIGHLY RECOMMENDED TO TEST THE FILTER CRITERIA BY VIEWING FIRST, BEFORE ADDING A FILTER ACTION TO THE FILTER.**

**Example:** **{Field}criteria | {field}=function**

Will result in an action taking place on the field values in the group of records specified by the criteria. Used by Upper(), Lower(), Caps(), Blank(), Today()

Or

**{Field}criteria | function**

Will result in an action taking place on the field values in the group of records specified by the criteria. Used by Delete()

Or

**{Field}criteria | {Field}=value**

Will result in changing the value of the field after the | character, based on the criteria for the records to change.

Or

**{Field}criteria | {Field1}={Field2}**

Will result in changing the value of field1 after the | character, TO THE VALUE of field2 after the pipe character, based on the criteria for the records to change.

**Equals (=) –** Change a field value to another value. Use = to specify a value or to utilize certain functions.

**{Affiliation}"Your Health" | {Affiliation}=My Health**

Will result in changing the value “Your Health” in the Affiliation Field, to “My Health”

**{Department}blank | {Department}={Division}**

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Will result in changing the value of all department fields which are blank, to the value of the division field in each record.

### Filter Action Functions

**Lower()** – Change the field value to all lower case letters

**{Status}Active | {Status}=Lower()**

Will result in changing all records with status fields that contain the value Active to active.

**Upper()** – Change the field value to all upper case letters

**{State}not blank | {State}=Upper()**

Will result in changing all state fields that contain data to upper case letters.

**Caps()** – Change the field value to “Title Case”  
(upper case first letter, lower case remaining letters)

**{Affiliation}you.. | {Affiliation}=Caps()**

Will result in changing all affiliation fields that contain a value beginning with you to initial cap formatting. (Example: your hospital would be changed to Your Hospital)

**Blank()** – Change the field value to blank()

**{Affiliation}You.. | {Affiliation}=blank()**

Will result in changing all affiliation fields that contain a value beginning with You to a blank value.

**Today()** – Change the field value to today()

**{Event Date}blank | {Event Date}=Today()**

Will result in changing all events with a blank date field to Today's date.

**Delete()** – Delete the records specified

**{Event Name}blank | delete()**

Will result in DELETING ALL RECORDS that have a blank event name. **THIS RESULTS IN THE LOSS OF ALL OF THE RECORDS THAT CONTAIN THE SPECIFIED CRITERIA**

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