

MicroStrategy Quick Guide: Creating Filters

FILTERS

Filters are conditions that the data must meet in order to be included in the report result set. You can specify filters based on attributes or metrics, as well as other objects within the report.

FILTER TYPES

- **Attribute Qualifications** – these filters restrict data related to attributes on a report.
 - **Attribute form qualification** – filter based on attribute forms
 - **Attribute element list qualification** – filter based on attribute elements
 - **Attribute-to-attribute qualification** – filter by comparing two attributes
- **Set Qualifications** – these filters restrict data related to the value, rank, or percentage of a metric, by comparing two metric values, or based on the relationships between the attributes on the report
 - **Metric set qualification** – filter based on metric value or rank
 - **Metric-to-metric qualification** – filter by comparing the values of two metrics
- **Shortcut Qualifications** – these filters restrict data related to existing report results or to an existing filter
 - **Shortcut-to-a-report qualification** – filter based on the results of an existing report
 - **Shortcut-to-a-filter qualification** – filter based on an existing filter

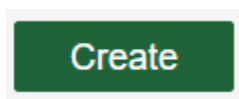
CREATE A FILTER

Standalone

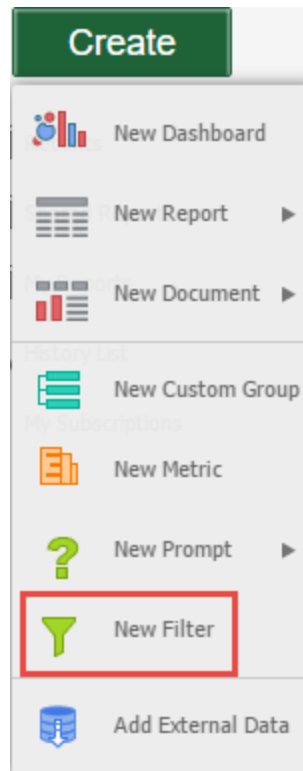
As a Power User, you can create standalone filters to be used on multiple reports.

Note: To create a prompted filter, follow the instructions in the quick guide titled Creating Prompts.

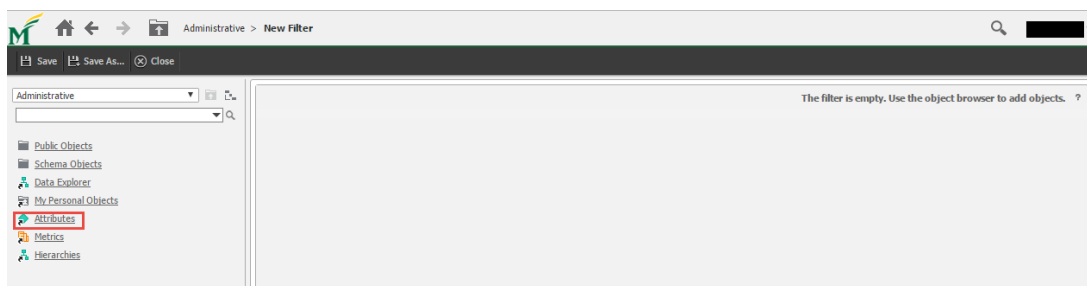
1. Navigate to the home screen in MicroStrategy.
2. Click on Create



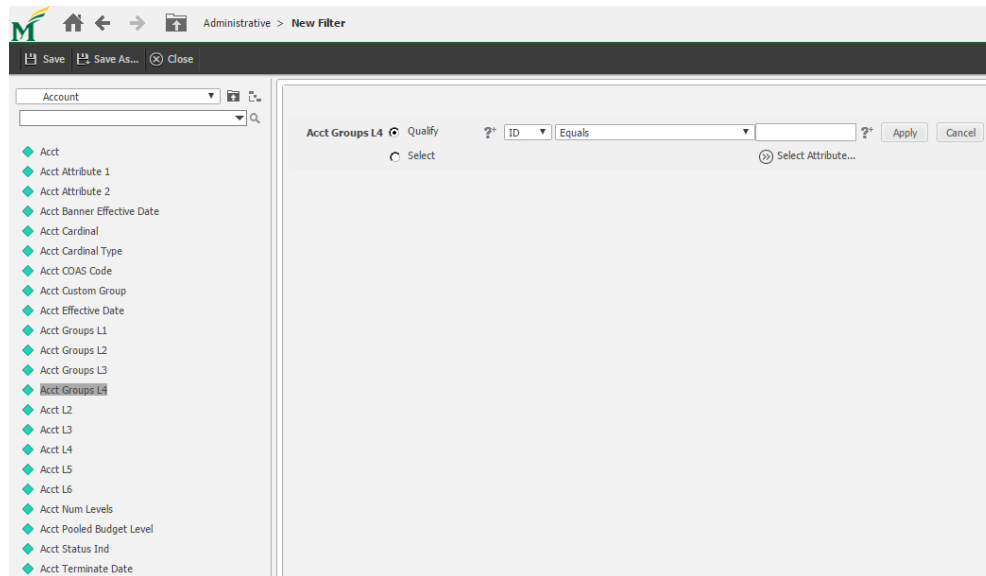
3. Click on New Filter



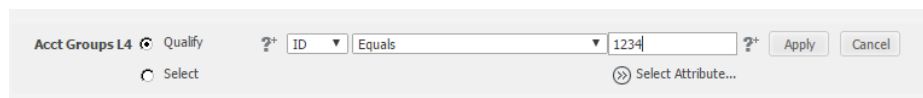
4. Follow the appropriate instructions based on the type of filter that you want to create. One or many filter types, or “qualifications”, can make up a single filter.
 - a. Attribute Qualification
 - i. Navigate to the attribute that you want to use for the filter



1. Drag the attribute from the folder navigation on the left side of the screen and drop it in the open area on the right side of the screen

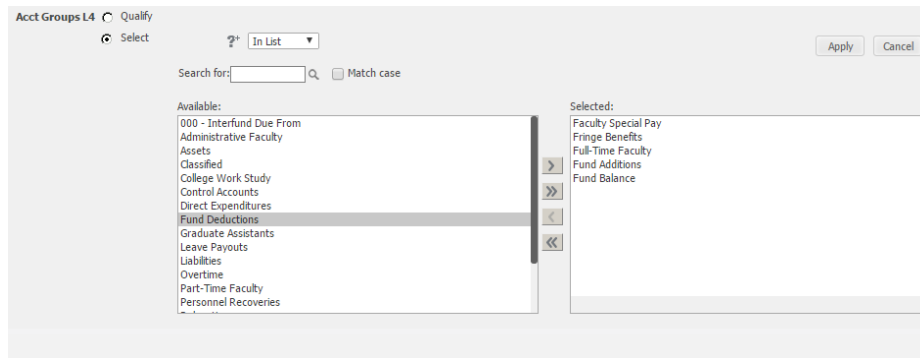


2. Click Apply, Save, name the Filter, OK
- ii. Follow these instructions to create an attribute form qualification
 1. Click the radio button next to “Qualify”
 2. Select the attribute form that you want to use to filter the data from the drop down menu (e.g. ID, DESC, SORT)
 3. Select the operator to use for the qualification from the drop down menu (e.g. Equals, Does not equal, Like, Contains)
 4. Type in the value to use to filter the data
 5. Click Apply to add the attribute form qualification to the filter

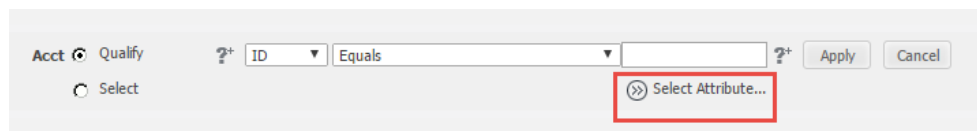


6. Click Save, name the filter, OK
- iii. Follow these instructions to create an attribute element list qualification
 1. Click the radio button next to “Select”
 2. Select the operator to use (“In List” or “Not In List”)
 3. Select attribute elements in the Available box and move them to the Selected box to filter the data

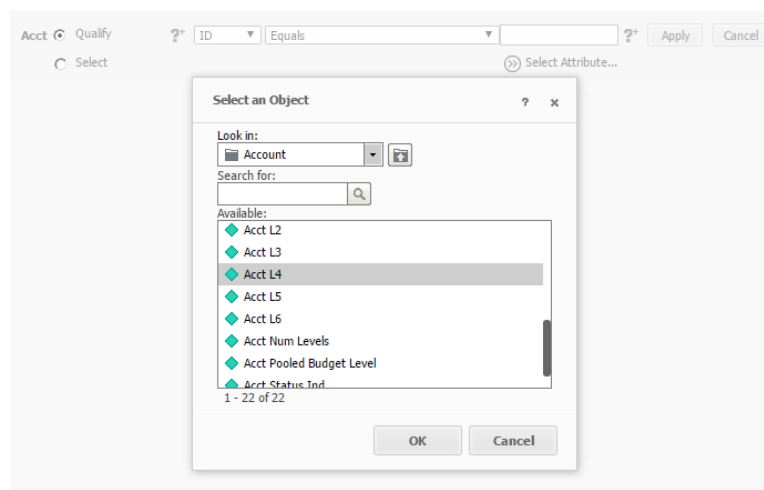
4. Click Apply to add the element list qualification to the filter



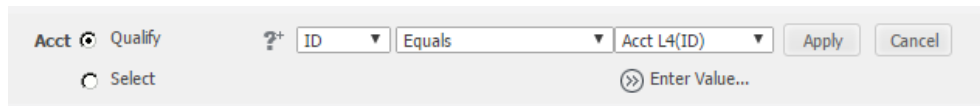
5. Click Save, name the filter, OK
- iv. Follow these instructions to create an attribute-to-attribute qualification
 1. Click the radio button next to "Qualify"
 2. Select the attribute form that you want to use to filter the data from the drop down menu (e.g. ID, DESC)
 3. Select the operator to use for the qualification from the drop down menu (e.g. Equals, Does not equal, Like, Contains)
 4. Click the button next to "Select Attribute..."



5. Navigate to the attribute that you want to use as the second attribute in the comparison to filter the data
6. Select the attribute and click "OK"



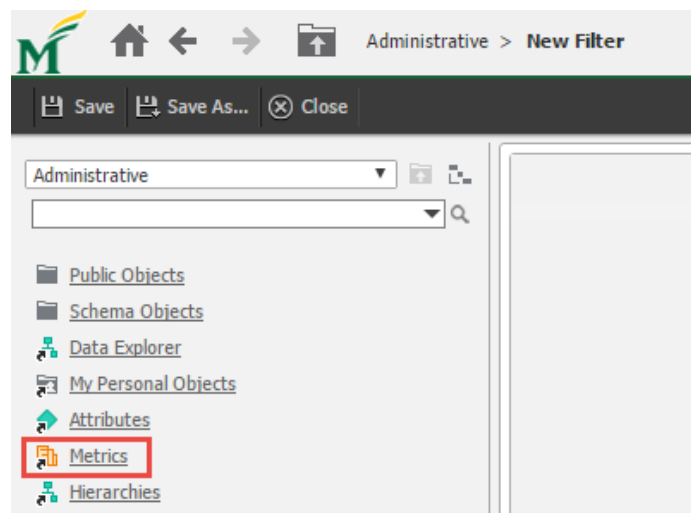
7. Click Apply to add the attribute-to-attribute qualification to the filter



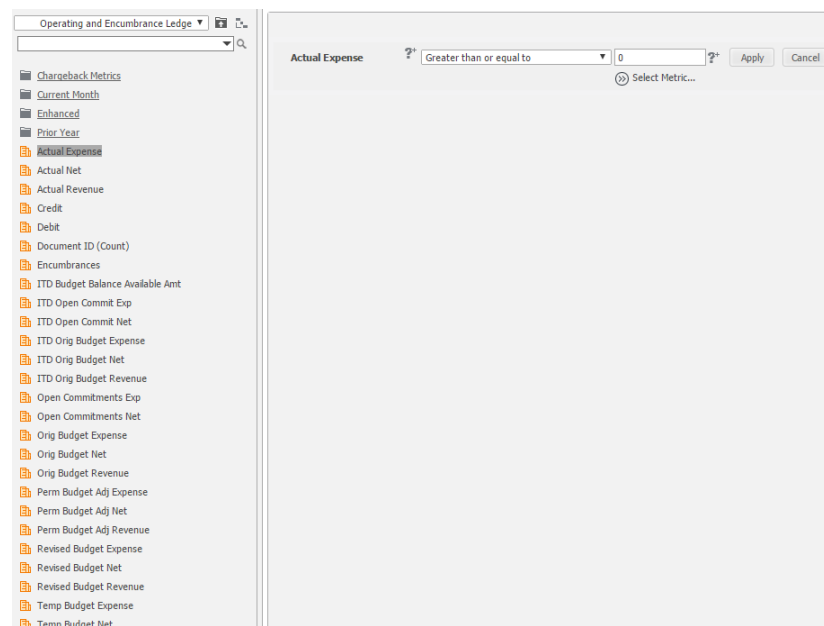
Acct ☒ Qualify ☐ Select ?+ ID ▾ Equals ▾ Acct L4(ID) ▾ Apply Cancel

Enter Value...

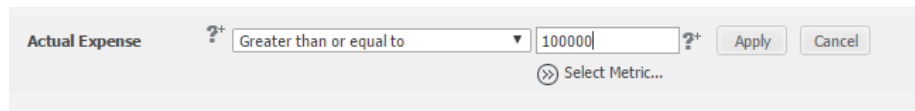
8. Click Save, name the filter, OK
- b. Set Qualification (metric filter)
 - i. Navigate to the metric that you want to use for the filter



- ii. Drag the metric from the folder navigation on the left side of the screen and drop it in the open area on the right side of the screen



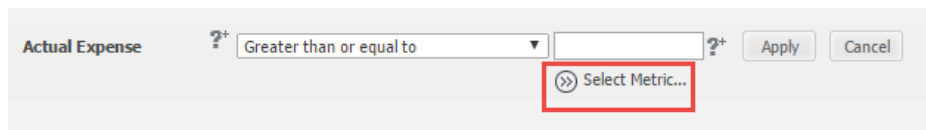
- iii. Click Save, name the filter, OK
- iv. Follow these instructions to create a metric set qualification
 1. Select the operator to use for the qualification from the drop down menu (e.g. Equals, Does not equal, Greater than, Less than)
 2. Type in the value to use to filter the data
 3. Click Apply to add the metric set qualification to the filter



Actual Expense ?+ Greater than or equal to 100000 ?+ Apply Cancel

» Select Metric...

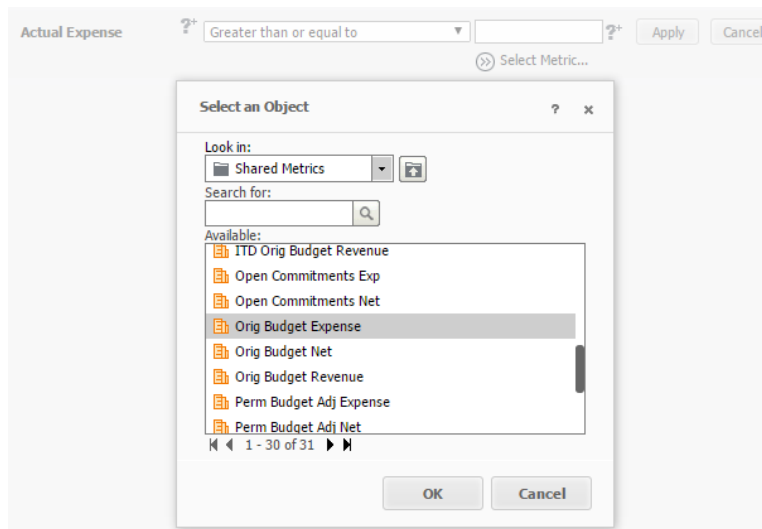
4. Click Save, name the filter, OK
- v. Follow these instructions to create a metric-to-metric qualification
 1. Select the operator to use for the qualification from the drop down menu (e.g. Equals, Does not equal, Greater than, Less than)
 2. Click the button next to "Select Metric..."



Actual Expense ?+ Greater than or equal to ?+ Apply Cancel

» Select Metric...

3. Navigate to the metric that you want to use as the second metric in the comparison to filter the data



Actual Expense ?+ Greater than or equal to ?+ Apply Cancel

» Select Metric...

Select an Object ? x

Look in: Shared Metrics

Search for:

Available:

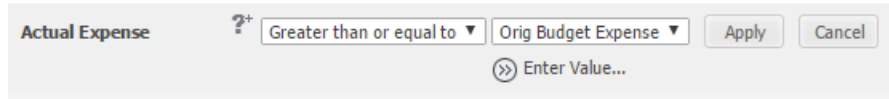
- ITD Orig Budget Revenue
- Open Commitments Exp
- Open Commitments Net
- Orig Budget Expense
- Orig Budget Net
- Orig Budget Revenue
- Perm Budget Adj Expense
- Perm Budget Adj Net

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OK Cancel

4. Select the metric and click "OK"

5. Click Apply to add the metric-to-metric qualification to the filter

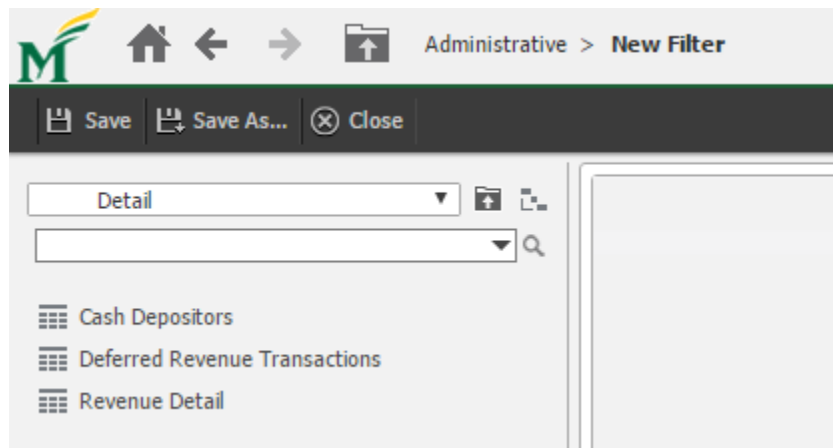


6. Click Save, name the filter, OK

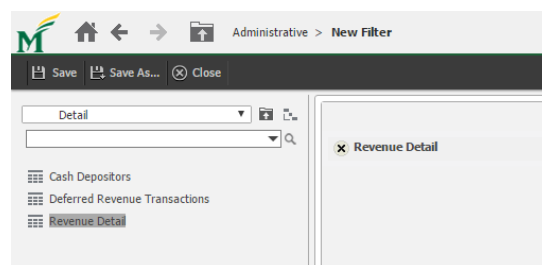
c. Shortcut (report) Qualification

i. Shortcut-to-a-report qualification

1. Navigate to the existing report that you want to use to filter data



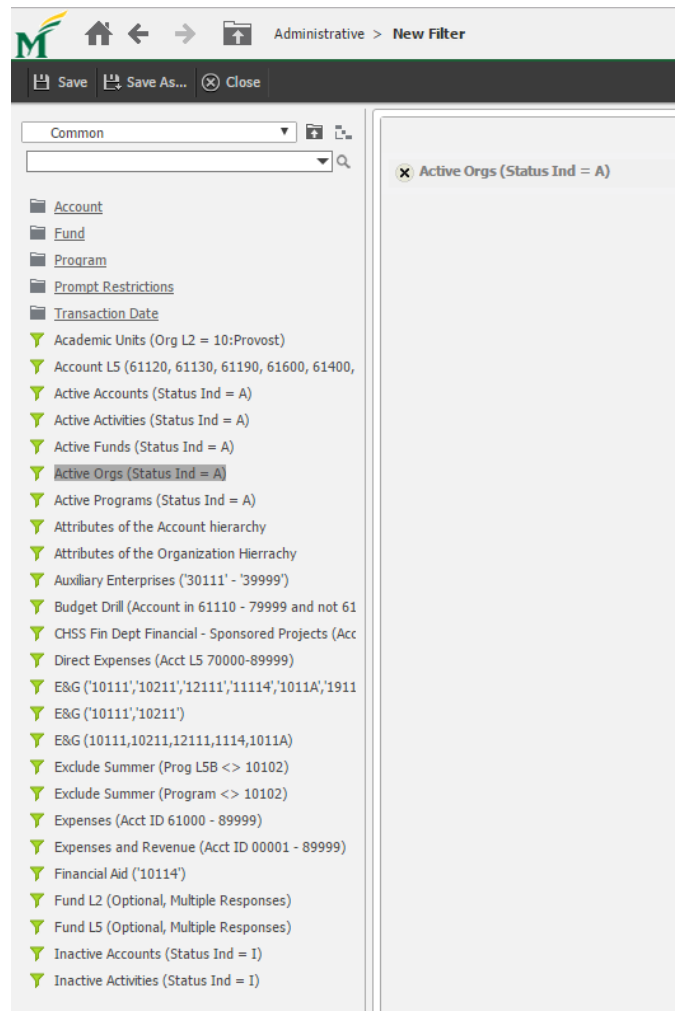
2. Drag the report from the folder navigation on the left side of the screen and drop it in the open area on the right side of the screen



3. Click Save, name the filter, OK

ii. Shortcut-to-a-filter qualification

1. Navigate to the existing filter that you want to reuse
2. Drag the filter from the folder navigation on the left side of the screen and drop it in the open area on the right side of the screen



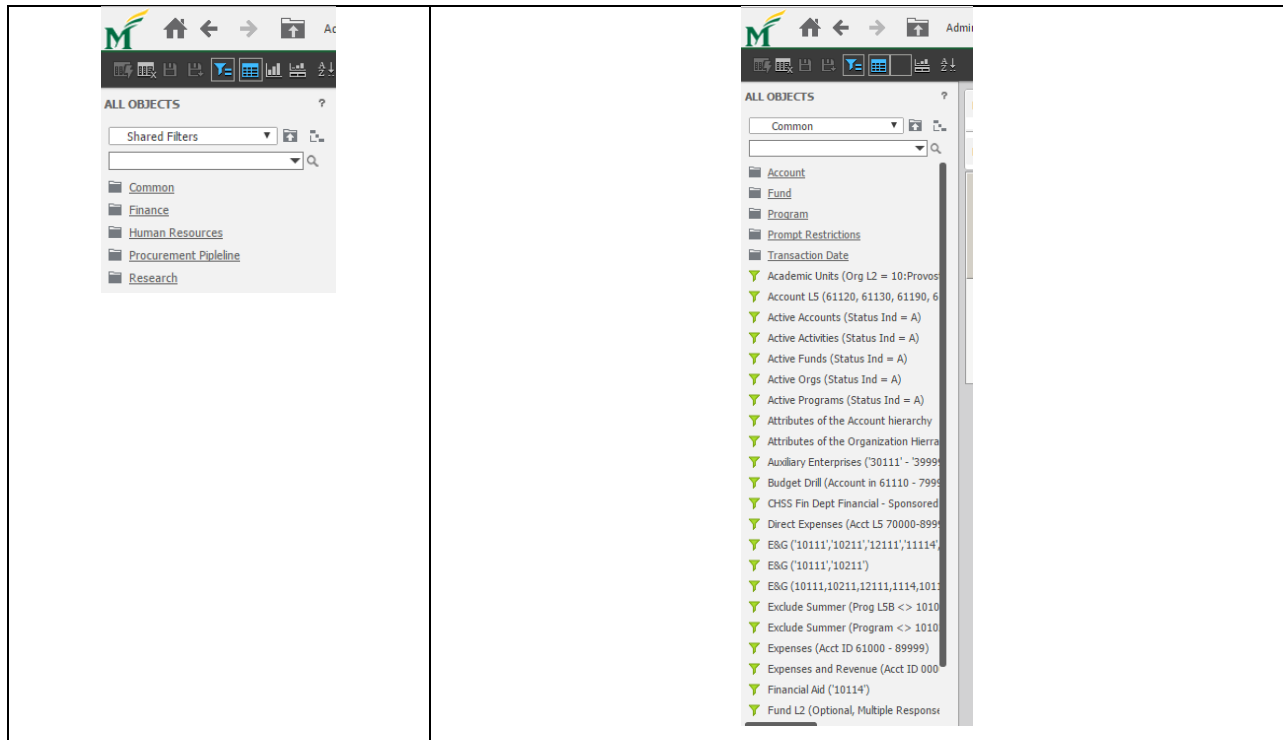
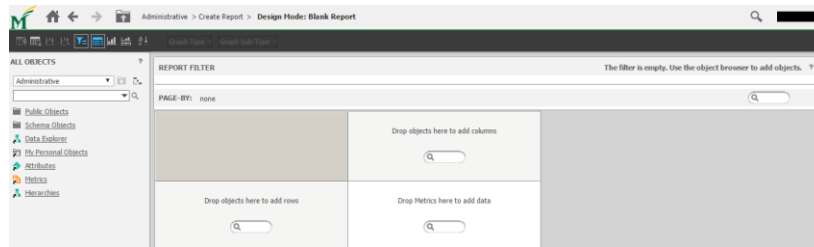
5. Click Save, name the filter, OK

Reusing existing filters within a Report

When you're creating or modifying a report, you can use the standalone filters that you or others have created as part of the report definition. Navigate to the folder containing the filter object, drag the filter object and drop it in the Report Filter open area.

Shared Filters are found in:

Public Objects → Shared Filters



You can also create filters on the fly within a report. **Filters created this way will be local to the report and cannot be reused.**

1. Open a report in design view (or create a new blank report)
2. Using the object browser on the left side of the screen, navigate to the object that you want to use to create your filter (e.g. if you want to filter using Fiscal Year, navigate to the folder containing the Fiscal Year attribute)
3. Drag the object and drop in the Report Filter open area



4. Follow the same procedure as if you were creating a standalone filter.