

Table Conditions

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Overview

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Table conditions permit you to limit the data returned from a specific table. For example you may wish to limit your query of a sales table to specific Product transactions rather than allowing a user to query all data in the table.

Condition Builder

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INTERNATIONALBANKRATE Conditions

Condition List

➔()

➜()

And ▼

☐ BASECODE

Equal to

AUD

☐ OFFSETCODE

Equal to

USD

1

New

6

Delete

Move Up

Move Down

Condition Logic

BASECODE Equal to 'AUD' and OFFSETCODE Equal to 'USD'

7

Save & Close

1. The item that has been selected on the report data page for filtering. E.g. Cost.
2. The Operator drop down lets you select what type of filter to be used. For example if the date is greater than 0
3. The Value entered for the condition
4. The brackets allow for greater complexity in data filtering by using AND and OR with the where clause operator.
5. The where clause operator allows the user to set multiple filters using AND or OR. For example filter all People where AGE is Greater than 50 or Gender = Female.
6. The move up and down buttons allows the user to build complex bracketing filters. The level of a statement within the bracket will affect the overall filter statement and impact upon the data returned in the query.
7. The condition logic display allows a user to read a summary of the filter that they have defined. Click the refresh link to update the logic if conditions have changed in the form.

When defining a filter initially set the operator drop down to the desired value. The options within the drop down will vary based upon the type of field that the filter is to be applied to.

Possible values for the operator include:

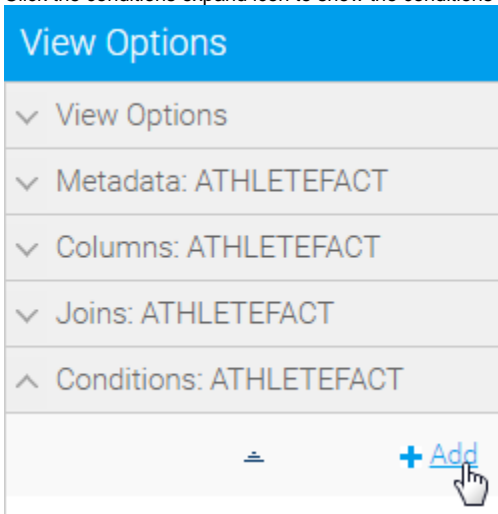
Operator	Description
Equal to	Equal to a single alphanumeric or string value

Greater than	Greater than a single alphanumeric or string value
Greater than or equal to	Greater than or equal to a single alphanumeric or string value
Less than	Less than a single alphanumeric or string value
Less than or equal to	Less than or equal to a single alphanumeric or string value
Different from	Not equal to or different from a single alphanumeric or string value
Between	Between variable 1 and variable 2 these will need to be legitimate parameters such as date, age etc.
Not Between	Not between variable 1 and variable 2 these will need to be legitimate parameters such as date, age etc.
In List	One or more alphanumeric or string values
Not In List	Two or more alphanumeric or string values
Is Null	Record contains no value for selected attribute. No Parameter can be set
Is Not Null	Record contains a value for selected attribute. No Parameter can be set
Like	Records that contain the same letter or letters.
Starts With	String starts with letter or letters
Ends With	String end with letter or letters

Create New Basic Condition

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1. Select the table you wish to apply a condition to and click the properties link. This will open the table properties in the View Option Panel.
2. Click the conditions expand icon to show the conditions and click the **add** link. This will open the conditions popup.



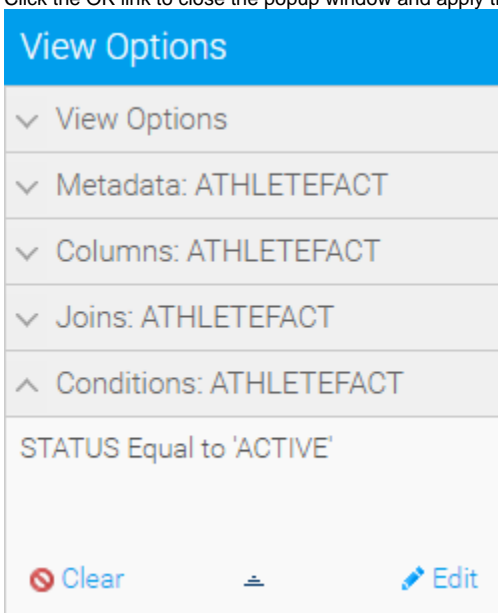
3. Click New to create a condition, select the column you wish to place a condition on. Select the operator and enter a value. Click **Add** to add the condition into the list.

Condition List

No Conditions found.

☐ Dynamic
 STATUS
 Equal to
 ACTIVE
 Add

- Continue to add conditions in this manner – use the AND OR operators and bracketing to create complex conditions. Click the OK link to close the popup window and apply the changes to the conditions section of the table properties.

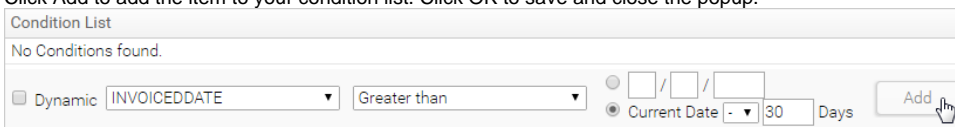


Current Date Conditions

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Often it is useful to limit the result set in a view by a data condition. For example to only return the last 90 days data. This can be achieved through a Current Date condition on a view table.

- On the condition popup select the date that you wish to filter on. Based on selecting a date the current date option will be displayed.
- Select the + - for setting the condition and the number of days which are relevant.
- Click Add to add the item to your condition list. Click OK to save and close the popup.



Dynamic Conditions

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A dynamic condition is a condition that is applied based on a user's preference. For example a user may want to view currency data in their preferred currency. If you have a currency conversion table you will be able to create a calculated field based on a preferred currency.

Dynamic conditions can be used in a variety of ways such as converting metric into empirical measures, converting currencies or converting product descriptions into preferred languages.

How they Work

The dynamic condition works by allowing you to join your data to a translation table e.g. Currency. This table will have multiple values for each currency of interest – so normally you would create multiple records if the join had been applied by with no condition.

A dynamic condition is then applied to ensure that for each user only one possible currency is used. This privatises the data based on the currency selection in the user profile.

Create a Dynamic Condition

To create a dynamic condition you will need to do the following.

- Begin creating a condition as outlined earlier

2. Tick the Dynamic option when creating a condition, you will now notice different options available:

Condition List

No Conditions found.

☒ Dynamic OFFSETCODE -- Dynamic Filter Code -- Default -- Add

[Create Dynamic Filter Code](#)

3. You will need to create a set of codes for each possible value to be used, much the same way you would create an [Org Ref Code](#), by clicking on the **Create Dynamic Filter Code** link.

Condition List

No Conditions found.

☒ Dynamic OFFSETCODE -- Dynamic Filter Code -- Default -- Add

[Create Dynamic Filter Code](#)

4. You will now need to create a record for each unique code available, in this example, we create a record for each possible currency we have data for. The first value should be the Code, or the value found in the database table. The second value should be a Description, which is what users will see when they can select their preferred option. The third value can be used to provide a custom sort order, sometimes used to ensure the most commonly selected values are listed at the top to save time.

INTERNATIONALBANKRATE Conditions

Dynamic Filter Code Details

Name: Currency

Dynamic Filter Code

Code:	Name:	Sort Order:
AUD	Australian Dollar	

Add

Cancel Save and Close

5. This is what your list of codes will look like complete. Click **Save & Close** to complete.

INTERNATIONALBANKRATE Conditions

Dynamic Filter Code Details

Name: Currency

Dynamic Filter Code

	Code:	Name:	Sort Order:
<input type="checkbox"/>	AUD	Australian Dollar	0
<input type="checkbox"/>	CAD	Canadian Dollar	0
<input type="checkbox"/>	EUR	Euro	0
<input type="checkbox"/>	JPY	Japanese Yen	0
<input type="checkbox"/>	USD	United States Dollar	0

Buttons: Add, Edit, Delete, Cancel, Save and Close

6. You will now need to select your code from the Dynamic Filter Codes list, and select a default value from the list (this is used as the default if the user has not selected a preferred value in their profile). Save.

Condition List

No Conditions found.

☒ Dynamic OFFSETCODE Currency -- Default -- Add

Edit Dynamic Filter Code

Australian Dollar

Save & Close

7. Your condition will now display like the one shown here

View Options

View Options

Metadata: INTERNATIONALBAN..

Columns: INTERNATIONALBAN...

Joins: INTERNATIONALBANKR...

Conditions: INTERNATIONALBA...

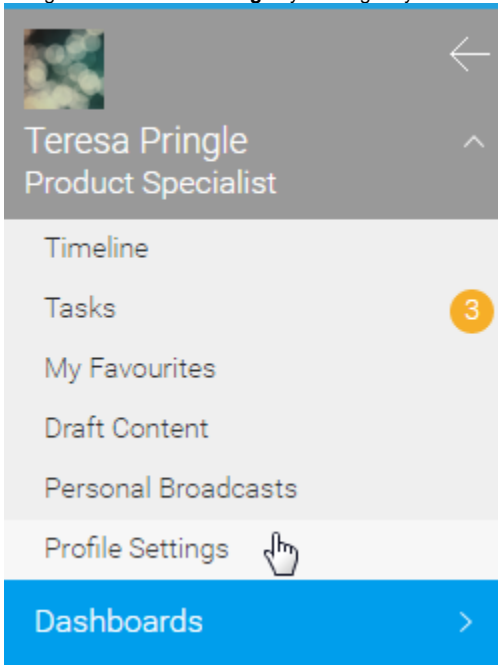
OFFSETCODE Dynamic (Cur...

Clear Edit

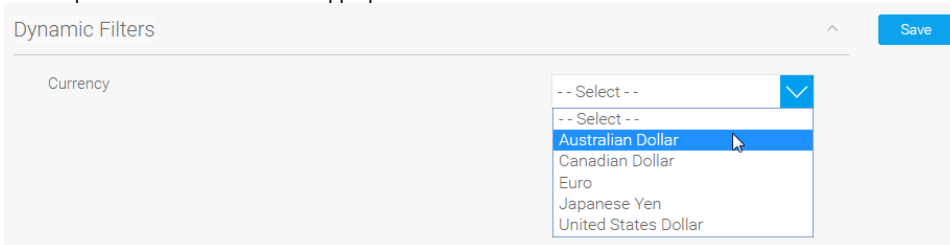
Defining a User's Value for a Dynamic Condition

Once a Dynamic Condition has been created, a user will be able to select which value they wish to use for it:

1. Navigate to the **User Settings** by clicking on your **User Name** in the main navigation bar, and select **Settings**



2. You will now have any available **Dynamic Conditions**. The example here has Currency (the name of our Dynamic Filter Code) and a drop down list with possible values. Select the appropriate value for the user.



3. **Save.**

Clear Conditions

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To remove or clear the conditions from a table select the table properties and click the Clear link. This will remove all the conditions associated for that table.

View Options

View Options

Metadata: INTERNATIONALBAN..

Columns: INTERNATIONALBAN...

Joins: INTERNATIONALBANKR...

Conditions: INTERNATIONALBA...

OFFSETCODE Dynamic (Cur...

Clear

Edit

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