7.11.1 Filter Dialog

Filter dialog is used to configure filtering expression for a custom report. Streamline is able to build very powerful filtering expressions. You can filter by any column of the **All items** report and use several options in one filtering statement. You can build compound expressions having up to twelve filtering statements.

You can create custom reports on the **Inventory planning**, **Inter-store optimization**, **Distribution center**, or **Report** tab. Depending on the tab, the set of columns used in filtering expressions differs.

To open the **Filter** dialog:

- 1. Go to one of the mentioned tabs.
- 2. Click the **New filter** button found on the left of the **All items** tab (see figure below).

		▼ + New filter	All items											
	0) Search	🗘 🌣 Settings 🏾	🖫 In transition	📰 Export table 🔻 🖥 Ex	port parameters	Import parameters	 F Planned orders 	Containers	and group	Show co	olumns 🖕		
Start		Item category	Item category 2	Item code	Description	Location	Supplier	Group)	On hand	d Days of supply	To ship	To receive	Lead time, l
~		item category	lory Item category 2	Item code	Description	Location	Supplier	ID	Min cost	On hand		to ship	i lo receive	days
Demand	1	Pharmacies	Pharmacies	05-T48	Cold & Flu Tablets [s	WH-001	56892-P			11,180	32	0	0	
Î	2	Pharmacies	Pharmacies	05-T48	Cold & Flu Tablets [s	WH-002	56892-P			11,180	32	0	0	30
Inventory	3	Pharmacies	Pharmacies	05-T48	Cold & Flu Tablets [s	WH-003	56892-P			17,641	44	0	0	60
	4	Consumer g	Furniture	1866-MB	Desk [linear trend m	WH-001	125689			5,920	36	0	0	30
E Reports	5	Consumer g	Furniture	1866-MB	Desk [linear trend m	WH-002	125689			5,920	36	0	0	30
1	6	Consumer g	Furniture	1866-MB	Desk [linear trend m	WH-003	125689			17,722	108	0	0	60
Dashboard	7	Fashion	Clothing Sum	004652 Blue	Swimwear [seasonal	WH-001	5612457			11,358	32	0	0	30
Bushbourd	8	Fashion	Clothina Sum	004652 Blue	Swimwear [seasonal	WH-002	5612457			11.358	32	0	0	30

Description of the Dialog

Filter				_		×
Filter nam	ie					
	~	~ =	~		~ ×	^
AND	~	~ =	~		~ ×	~
			Clear	ОК	Cance	ł

• The **Text field** at the top of the dialog is used to name the filter/report. This name will be displayed in the title of the newly created tab (see figure below).

		T+ New filter	All items M	Ianufacture P	lan ×								
	0), Search	🔋 🌣 Settings	s 🛛 🗛 Edit	ilter 🔻	💀 In transition 🛛 🔠 Expo	ort table 🔻 🖺 Ex	port	parameters 🛛 🖥 Imp	ort parameters 🔻 🍹	Planned orders	5	Contain
Start						Description	Leveling		Gundling	Group)	0	
~		Item category	Item catego	ory 2 Item code		Description	Location		Supplier	ID	Min cost	On h	of
Demand	1	Pharmacies	Pharmacies	Filter	•	Cold & Elu Tablats (c	WU 001		56000 D			11 10	×
$\mathbf{\widehat{v}}$	2	Pharmacies	Pharmacies		`	1					_		
Inventory	3	Pharmacies	Pharmacies	Manufactu	ire Plan								4
	4	Consumer g	Furniture		∼ Or	der type	/ =	\sim	Manufacture		×	× X	î
Reports	5	Consumer g	Furniture	AND	~								5
	6	Consumer g	Furniture	AND	~		/ =	~				×	þ
<u> 111</u>	7	Fashion	Clothing Sur	AND	\sim	\ \	/ =	\sim				×	2
Dashboard	8	Fashion	Clothing Sur										2
	9	Fashion	Clothing Sur	AND	~	\ \	/ =	\sim			· · · · · · · · · · · · · · · · · · ·	\times	
		Fashion	Clothing Sur		~		/ =	\sim			· · · · · · · · · · · · · · · · · · ·	×	
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	-		_	AND	\sim	~	/ =	\sim			×	×	P
		Fashion	Clothing Sur		~		/ =					×	~
	13	Fashion	Clothing Wi	AND	~					Clear	ОК	Canc	P
	14	Fashion	Clothing Wi							Cicui	0.4	Cunc	5

- Lines of controls below the **Text field** is used to build a filtering expression.
- The **Clear** button clears the filtering expression.

Filtering expression

A filter or filtering expression is built from elementary statements and structural operators. For example:

(A OR B) AND C.

Here:

- A, B, and C elementary statements that can be false or true;
- logical operators OR and AND, and brackets "(", ")" structural operators that build the structure of the expression.

By-turn, elementary statements follow the syntax:

<column name><relational operator><value>.

The figure below shows the mentioned parts in the **Filter** dialog.

Filter			— D	×
Test filter				
Elementary statement		✓ Finished	~ ×	^
structural operator			ue	
OR ~	Supplier 🗸 =	~ 1125	~ ×	
0 AND 0 V Cate	egory 2 🗸 =	 Consumer goods,Food 	/Beverages 🗸 🗙	
AND	\sim On hand \sim >	√ 300.00	÷ ×	
AND ~	~ =	~	~ X	
AND ~	~ =	~	~ ×	•
		Clear	OK Canc	el

Structural operators

Streamline filters implement three structural operators. Two of them are logical operators **AND**, **OR** and the third one – a brackets operator () **AND** ().

Each line below the *Filter name* field is used to build an elementary statement. The **X** button at the end of each line clears the corresponding condition.

Let's consider examples.

AND Operator

The filter shown in the figure below is equivalent to the expression:

Item code = 11 AND Item code = 22 AND Item code = 33

Filter			— 🗆 X
Test filter			
	✓ Item code ✓ =	~ 11	× × ^
AND	\checkmark Item code \checkmark =	~ 22	~ X
AND	∨ Item code ∨ =	~ 33	~ × 、
		Clear	OK Cancel

OR Operator

OR operator is always applied after **AND** operator. Consider an example shown in the figure below.

Filter							×
Test	filter						
	\sim	Item code	~ =	~ 11		~ X	î
	AND ~	/ Item code	~ =	~ 22		~ X	
OR	∨ Ite	m code 🛛 🗸	=	√ 33		~ X	
	AND ~	/ Item code	~ =	~ 44		~ X	~
				Clear	ОК	Cance	

The equivalent statement is:

Item code = 11 AND Item code = 22 OR Item code = 33 AND Item code = 44

As you see, Streamline groups statements that will be applied first using indents. Intends here are equivalent to brackets. So, this filter can be also written as:

(Item code = 11 AND Item code = 22) OR (Item code = 33 AND Item code = 44)

'() AND ()' Operator

This is a brackets operator that is used to control the application order of AND and OR operators. For

example, in order to write the following expression:

(Item code = 11 OR Item code = 22) AND Item code = 33,

Filter				—		×
Test filter						_
	∨ Item code	~ =	× 11		~ X	^
OR	∨ Item code	~ =	√ 22		~ X	
() AND ()	∨ Item code	~ =	~ 33		~ X	
			Clear	OK	Cance	si i

you should build the filter represented in the figure below.

However, the brackets operator can be applied only at one level. It means that nested brackets are not supported currently. For example, you can't build filtering criteria for the following expression:

((A OR B) AND D) OR E.

Elementary statements

An elementary statement in Streamline has the following syntax:

<column name><relational operator><value>.

For example:

Item type = Material.

You can use any column of the **All items** report in each elementary statement. Streamline automatically loads and shows all the available values for the selected column of which you can select the required (see figure below).

Filter			— 🗆 X
Filter nan	ne		
	✓ Item type	e ~ =	✓ ✓ × ^
AND	~	~ =	Intermediate Material
			Clear OK Cancel

Depending on the column type (string or numeric) set of Streamline relational operators differs (see table below).

Column type	Operators	Description
	=	Equals to
	¥	Doesn't equal to
String	NULL	ls empty
Sung	≠NULL	ls not empty
	Contains	The column value contains the given phrase
	Doesn't contain	The column value does not contain the given phrase
	=	Equals to
	≠	Doesn't equal to
	<	Less than
Numeric	≤	Equal or less than
Numeric	>	More than
	≥	Equal or more than
	NULL	ls empty
	≠NULL	Is not empty

For string columns, you can give several values in a statement using comma ",". This will be treated as a logical operator OR. For instance:

Item type = Finished,Intermediate.

If a value contains a comma, use quotation marks "" to wrap the value. For example:

Description = Arm Boom,"Muesli box, 500 g".

Next: In Transition Details Dialog

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Last update: 2022/09/01 15:38

