

Crystal Reports 9.0

Filtering Data (Lesson 4)

Lesson 4

Introduction

Filtering is a way of honing in on the information you want and only seeing that information.

Open the Crystal Report titled *Training.rpt*.

Process Summary

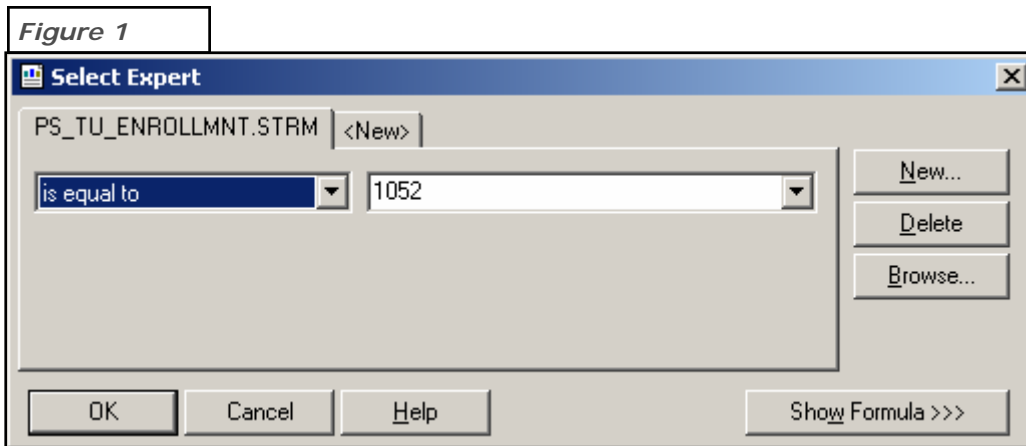
Introduction

Filtering Data

1. Record Level
2. Group Level

Filtering Data

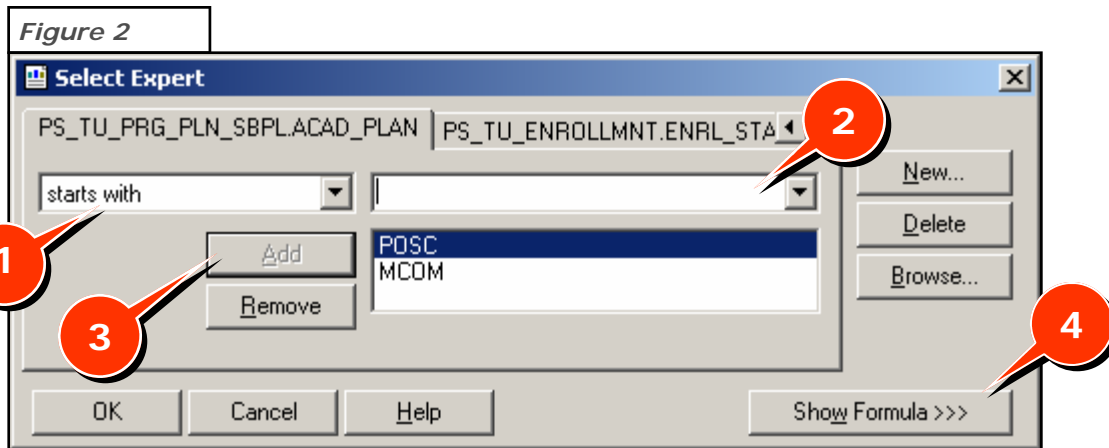
When the *Training.rpt* report was created using the Wizard, we added filters for the term, academic career, and enrollment status. Let's now add a filter via Record Selection from the menu. Click on **Report > Select Expert**. By default, if you have a field highlighted in your report, it will be selected here. If the selected field is not the one you want to include in the filter, click **Delete**.



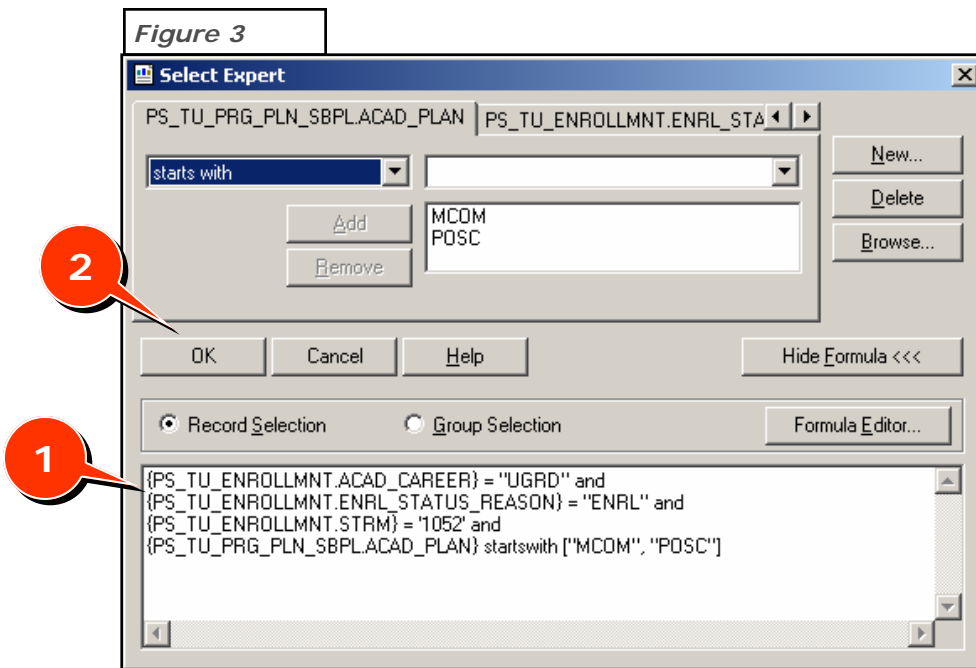
To add a filter, click **New** (Figure 1, 1). Locate and select the field ACAD_PLAN from the PS_TU_PRG_PLN_SBPL table or from the "Report Fields" section and click **OK**. For this filter we could select each individual plan, by using "is one of" from the drop-down box and clicking the arrow in the blank drop-down box, or we can use "starts with" and select the beginning of the plan.

For example, we could select "is one of" and type in or select and add all the MCOM plans (MCOM, MCOM-BS, MCOM-BA) and all the POSC plans (POSC, POSC-BS, POSC-BA), or we could choose "starts with" and type in or select MCOM and type in or select POSC.

Choose “starts with” (Figure 2, 1) and type MCOM (Fig 2, 2) and click **Add** (Fig 2, 3). Type POSC and click **Add**.



Then click on **Show Formula>>>** (Fig 2, 4). The window will expand, showing the formula (Fig 3, 1) that was created using the Select Expert. This can be edited manually, if you have a need to do so.



★ NOTE: The field names are always preceded by the table name, followed by a period and surrounded by curly brackets.

Click **OK** (Fig 3, 2).

⚡ This formula can also be edited by going to **Record > Selection Formulas > Record**.

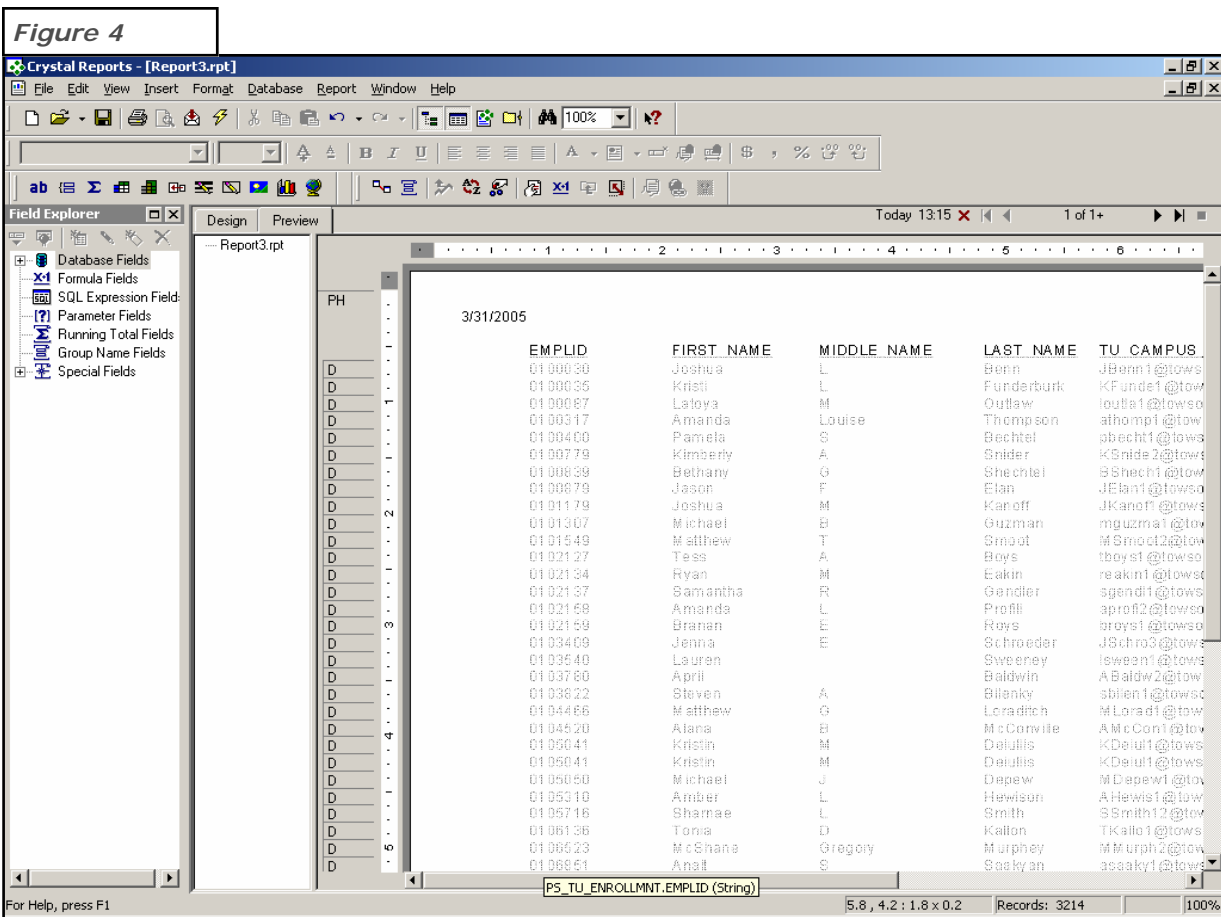
Now when we refresh the report, we will see all students from term 1064, having academic plans of MCOM, POSC or both.

Filtering at the Group Level

Filters can also be applied at the group level. To explain the difference, record selections process on the first pass (based on each row of data); group selections process on the second pass (based on a “group”).

An example of how this would be used is for a report, grouped on EMPLID, listing only those students who have completed 12 credits of History courses. Insert a summary field that counts (summarizes on) the number of credits and place it in the group footer. Then a create a Boolean condition in the **Report > Selection Formulas** section where the summary field is greater than or equal to 12.

After filtering the data, the number of records returned in the report has been considerably reduced.



Save the report (*Training.rpt*).

[Go to Lesson 5 - Creating a Parameter Field.](#)