



FAQ - How Do I Use the Filters in QDMS?

Question

How do I use the filters to search for things in QDMS?

Answer

A Filter is a method of selecting data to be displayed either on the screen or in a report.



A filter button is present on most toolbars throughout QDMS and is also available when generating standard reports.

Clicking on the **Filter** button will bring up the Simple Filter.

Simple Filters

The Simple Filter allows you to easily set up your selection criteria.

The structure of this filter is always **FIELD + COMPARISON + VALUE**, where FIELD is a field name or column heading, and COMPARISON is how the field is to be compared to the VALUE (e.g. *begins with, equal to, greater than, contains* etc.).

Some examples of Filters are shown below:

Field	Comparison	Value
REV	Equal to	1

In the above example, the filter expression is **REV equal to 1** where REV is the FIELD NAME, equal to is the COMPARISON and 1 is the VALUE. With this filter active on a report on the Master Document Register, documents would only appear on the report if their Revision is 1.

Another example is:

Field	Comparison	Value
TITLE	Contains	Steel

This filter, if applied to a Master Document Register report, will display only documents whose Title field contains the word STEEL (use the **Ignore case** check box to ensure uppercase/lowercase characters make no difference). If you selected *equal to* instead of *contains* as the comparison, the title field of the document would have to contain only the word STEEL and no other characters to be selected.

Multi-lined Simple Filters

The Simple Filter screen can be used to set up a multi-lined filter to apply more complex selection criteria. Up to five expression lines can be defined.

The **And/Or** buttons at the end of each line control how the previous expression line should be joined together with the next expression line.



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For example:

Field	Comparison	Value	And/Or
TITLE	Contains	Steel	And
DOCUMENTNO	Begins with	S	

This filter expression has two lines: TITLE contains STEEL And DOCUMENTNO begins with S. As the **And** option has been used to join line 2 to line 1, both expressions must be true for a document to be selected. If **Or** had been used to join the two lines then either expression could be true for a document to have it selected. Consider the following documents:

Document	Title
D1234	STEELWORK SHEET 1
S3452	STRUCTURAL DRAWING 1
R3256	STRUCTURAL DRAWING 2
S1212	STEELWORK SHEET 2

With the above filtering example and **And** as the join selection, only document S1212 will be selected since this is the only document that has a document number that begins with the letter S **And** for which the Title contains the word Steel. With **Or** as the join selection, all but document R3256 would be selected.

Saving Filters

It is possible to save filters for re-use later. To save a filter, first setup the required filter and then click the **Save** button at the bottom of the filter screen. Enter a title for the saved filter and any remarks when prompted. To load the filter at any time, activate the filter screen and then click the **Load** button. Select the required filter from the list.

Advanced Filters

Advanced Filters are a means by which more complex filter criteria can be applied to a screen view or report than those options available with a simple filter. A simple filter operates only on the current or primary table being viewed or reported on. An Advanced filter enables filtering information contained in tables that are linked to the primary table.

For example, using an Advanced filter is it possible to print a list of documents transmitted based on a field value in the Master document register. In this example the primary table is the Transmittal History and the linked table is the Master Document Register.

Contact QA Software for more information on the syntax to use when the need to use an Advanced filter arises.

Further information on issue

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