

## *Filtering Reports in Millennium*

When applied to reporting, the term “filtering” means the ability to select subsets of data for the purposes of reporting. For example, suppose you want to run a Payroll Register for Department 100 only. This would be described as “filtering” the report.

With the release of Millennium 3.0 version 96, M3 now has the ability to add filtering to the reports. The purpose of this document is to explain how to add filtering statements to the reports in order to run the report with only the data that you want to see.

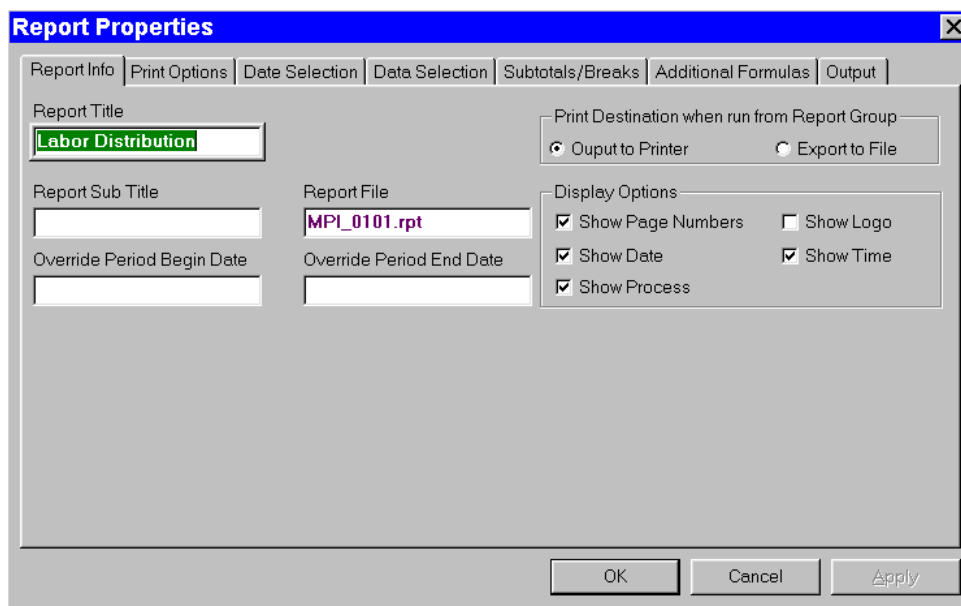
**Caution:** The process of filtering can only be done to reports written in Crystal. However, 99% of the reports in M3 were written in Crystal. To determine which reports are written in Crystal, the Report ID begins with MPI, for example the Payroll Summary Report is Report ID MPI\_0301.

There are two basic methods of accessing the reports in M3. The filtering methods are slightly different for each method:

(1) Reports accessed from the Company Maintenance>Reporting>Every Payroll tab:

(a) Highlight the report that you want to filter

(b) Right Click on the report and select “Properties” – You will be presented with the following window:



(c) Click on “Data Selection” and you will have the following window:

The screenshot shows the 'Report Properties' dialog box with the 'Data Selection' tab selected. The 'Data To Include On Report' section has two range selection options, Range 1 and Range 2, each with 'From' and 'Thru' dropdown menus. The 'Companies' section has three radio buttons: 'Current Company' (selected), 'All Companies', and 'Company Set'. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

This window has drop down selection fields – Range, From, Thru.

The screenshot shows the 'Report Properties' dialog box with the 'Data Selection' tab selected. The 'Data To Include On Report' section has 'Range 1' set to 'Emp Id' and 'From' set to '1710'. A list of employee records is displayed, with '1710 Molina, Lucia' highlighted in green. The 'Companies' section has three radio buttons: 'Current Company' (selected), 'All Companies', and 'Company Set'. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

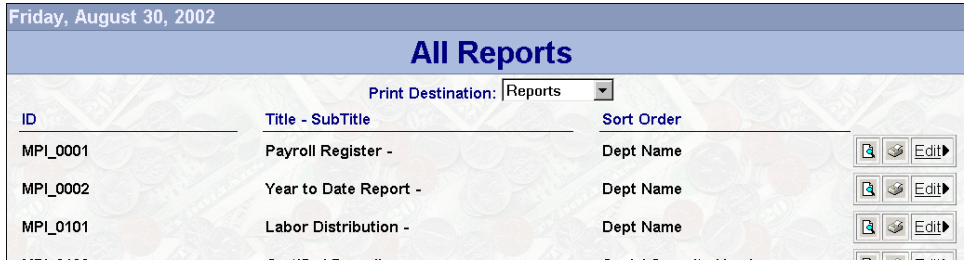
Emp Id	Name
1710	Molina, Lucia
1987	Burns, Maria Fe
32574	Enojo, Bernard
32579	Valdez, Rene
32587	Aguilar, Julio
39856	Castillo, Teresita

At this point, you could choose the Range, From and Thru fields. If you had a second set of filters, you would click on the small box at the left choosing “and” or “or” and enter a second set of filters.

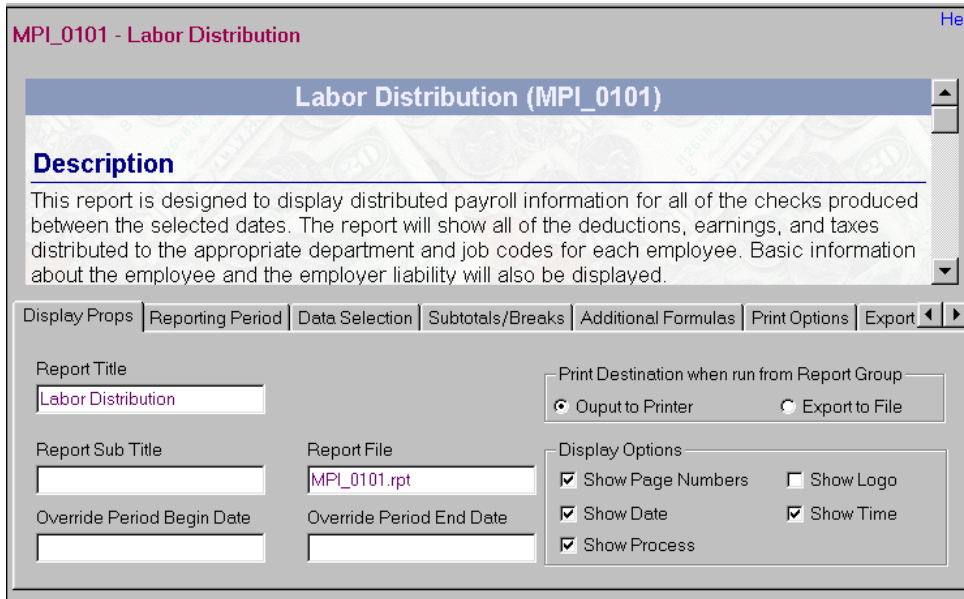
(d) After choosing your filters, click on “OK” to save the data. Then run the report as usual.

(2) Reports chosen from the left-side tree:

(a) By selecting this route to the reports, you will first see this window:



(b) Highlight the report you want and click on "Edit" – you will see this window:



This window is almost the same as the first method, but there is an additional "Description" area that describes the features of the report.

(c) Again, select the "Data Selection" tab and you will have the same selection window as the first method:

