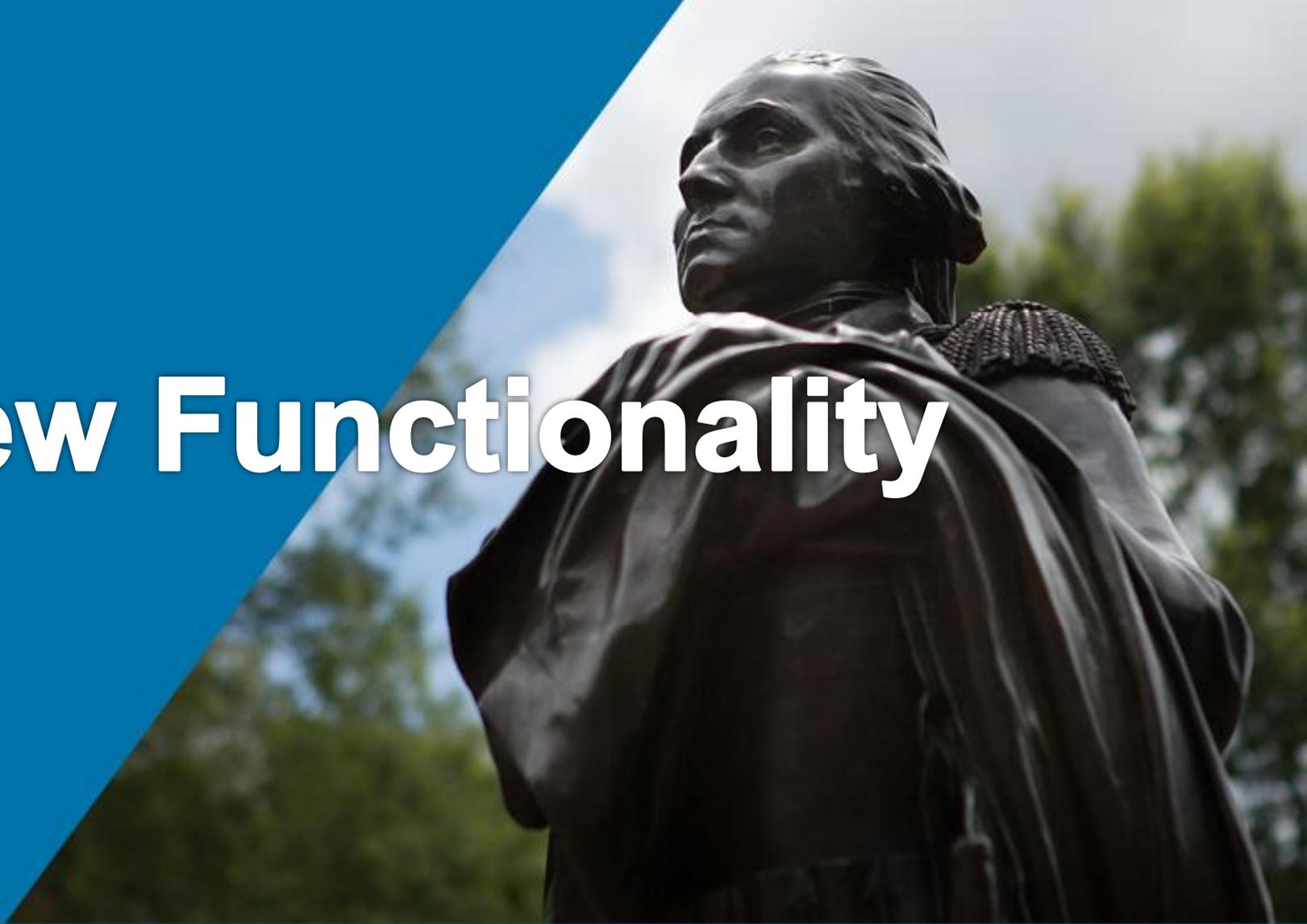


Dataview Functionality



Agenda

- Dataview Column Options
- The Refine feature
- Filtering Options
- Starts With, Not Starts With
- In, Not In
- *Like, Not Like*

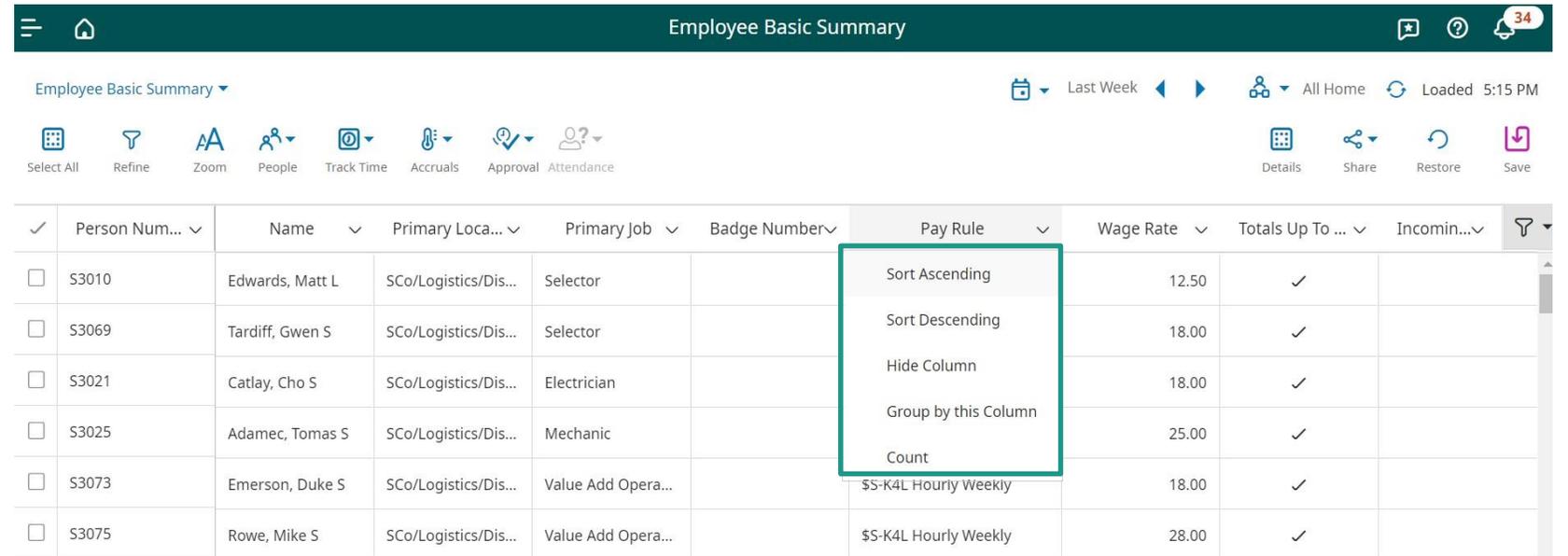


Dataviews

Column drop-down Options

Certain changes can be applied directly to the columns in a Dataview.
Options differ by data type.

- Sort records
- Group by text values
- Add calculations
- Hide columns
- Rearrange columns

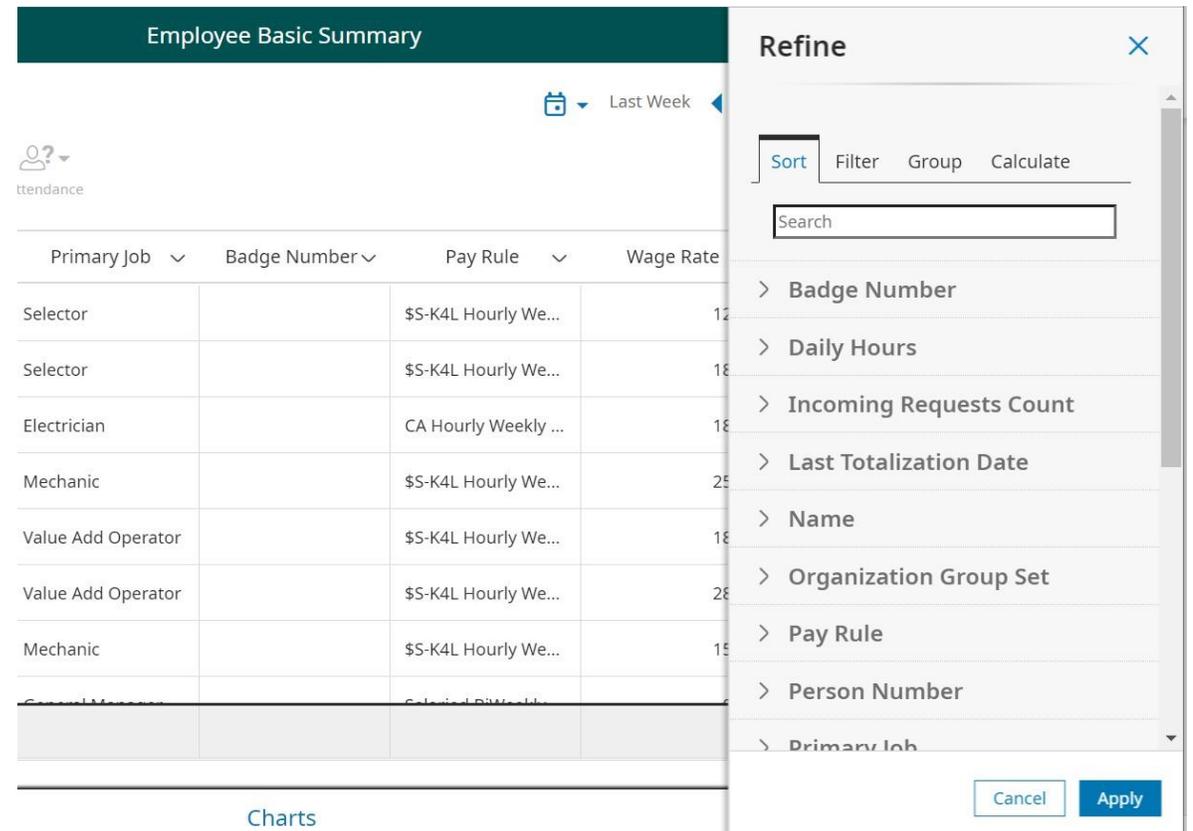
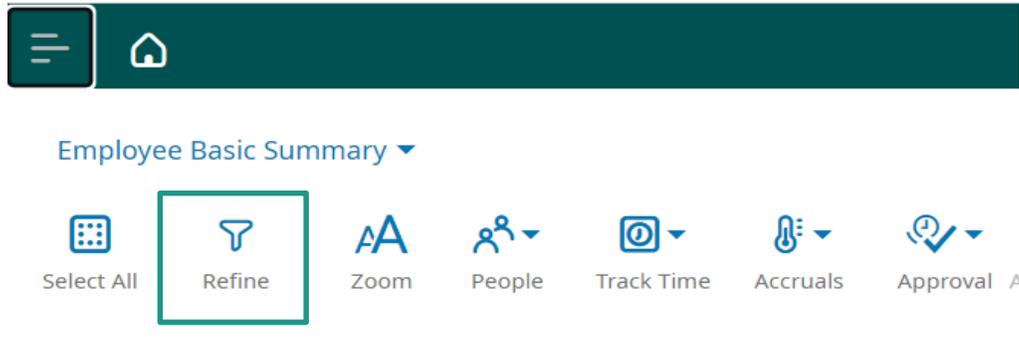


The screenshot shows a data view titled "Employee Basic Summary". The table has columns: Person Num..., Name, Primary Loca..., Primary Job, Badge Number, Pay Rule, Wage Rate, Totals Up To..., and Incomin... The "Pay Rule" column dropdown menu is open, showing options: Sort Ascending, Sort Descending, Hide Column, Group by this Column, and Count. The table data is as follows:

Person Num...	Name	Primary Loca...	Primary Job	Badge Number	Pay Rule	Wage Rate	Totals Up To ...	Incomin...
S3010	Edwards, Matt L.	SCo/Logistics/Dis...	Selector			12.50	✓	
S3069	Tardiff, Gwen S	SCo/Logistics/Dis...	Selector			18.00	✓	
S3021	Catlay, Cho S	SCo/Logistics/Dis...	Electrician			18.00	✓	
S3025	Adamec, Tomas S	SCo/Logistics/Dis...	Mechanic			25.00	✓	
S3073	Emerson, Duke S	SCo/Logistics/Dis...	Value Add Opera...		\$S-K4L Hourly Weekly	18.00	✓	
S3075	Rowe, Mike S	SCo/Logistics/Dis...	Value Add Opera...		\$S-K4L Hourly Weekly	28.00	✓	

Dataviews

Accessing the Refine Feature



Use the Refine icon in the top left corner of the Dataview to open the Refine panel on the right side of the form.

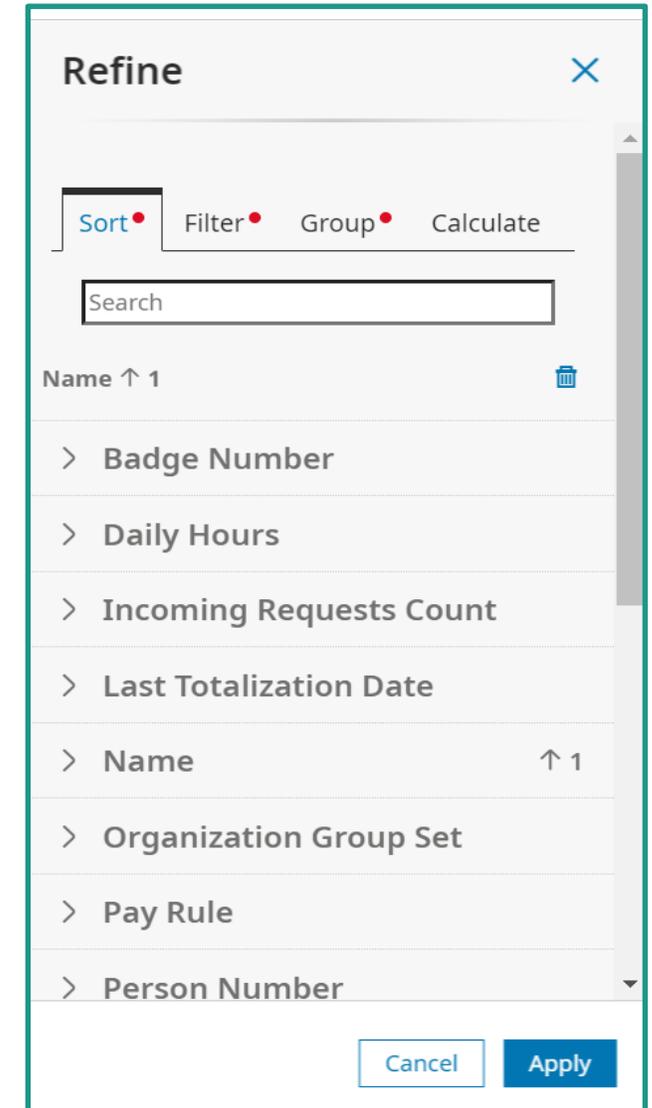
Refine Feature

The Sort Tab

We can always use the sort options available in each column's drop-down menu.

Additionally, once the Refine feature is open, one or more sort options may be added based on the columns available in the Dataview.

In this screen, the data is sorted by Name.



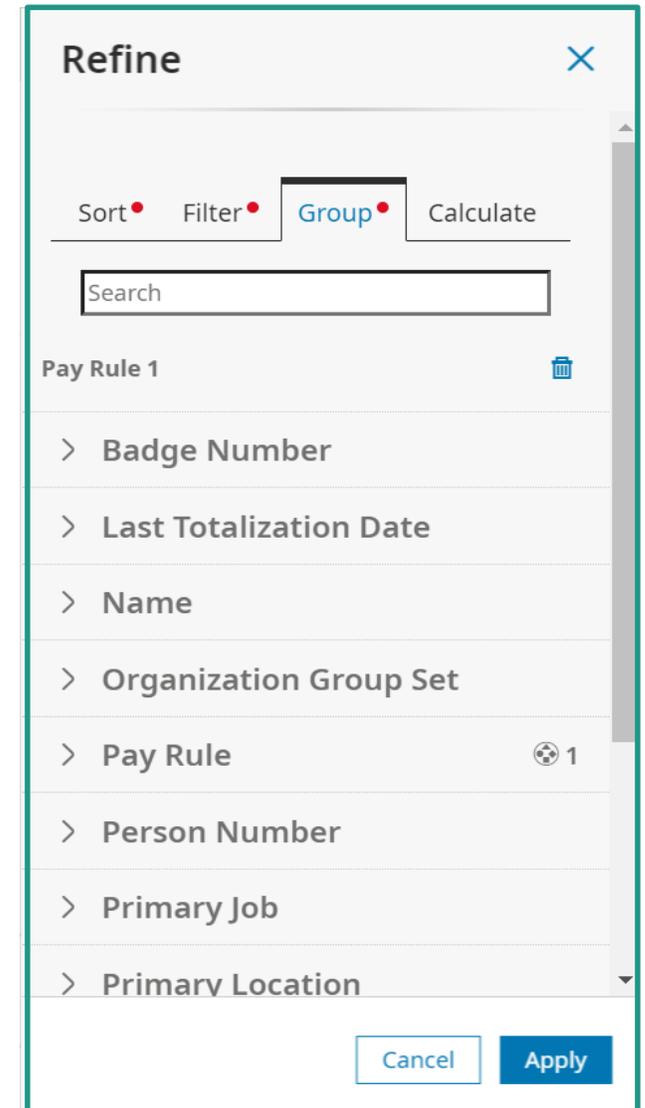
Refine Feature

The Group Tab

Grouping is most often applied directly to the Dataview columns.

Additionally, once the Refine feature is open, one or more groups may be added to control the organization of data on the Dataview.

In this screen, the records are grouped by Pay Rule.



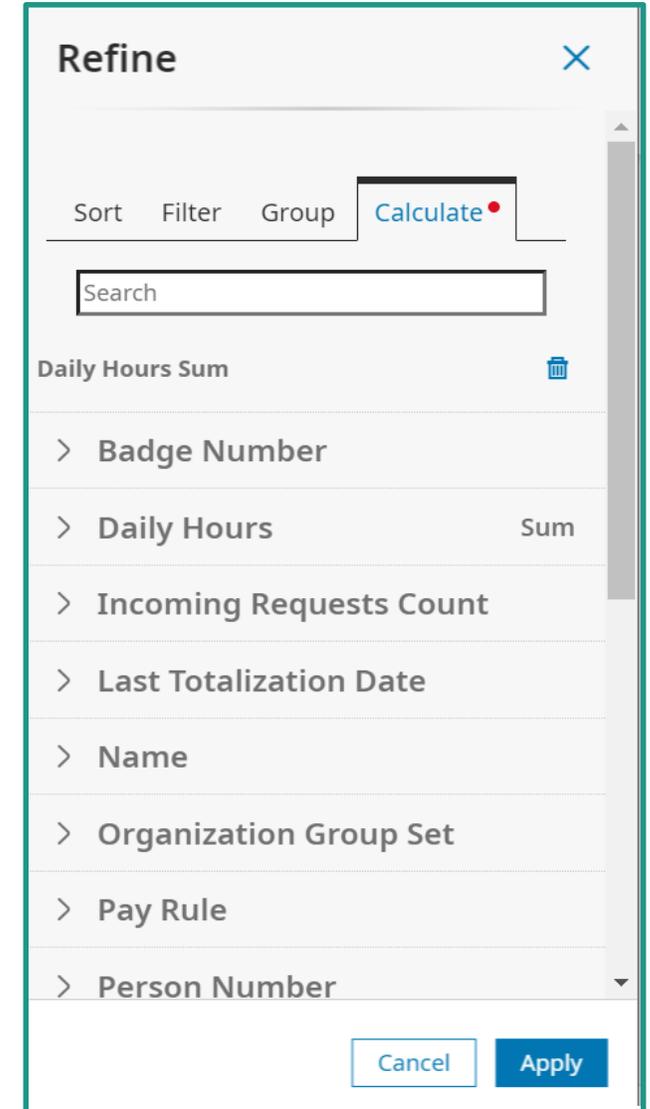
Refine Feature

The Calculate Tab

Calculations or summaries are typically added directly to the Dataview columns.

If preferred, once the Refine feature is open, use the settings to apply summaries to one or more columns.

In this screen, the data is totaled \ summed by Daily Hours.



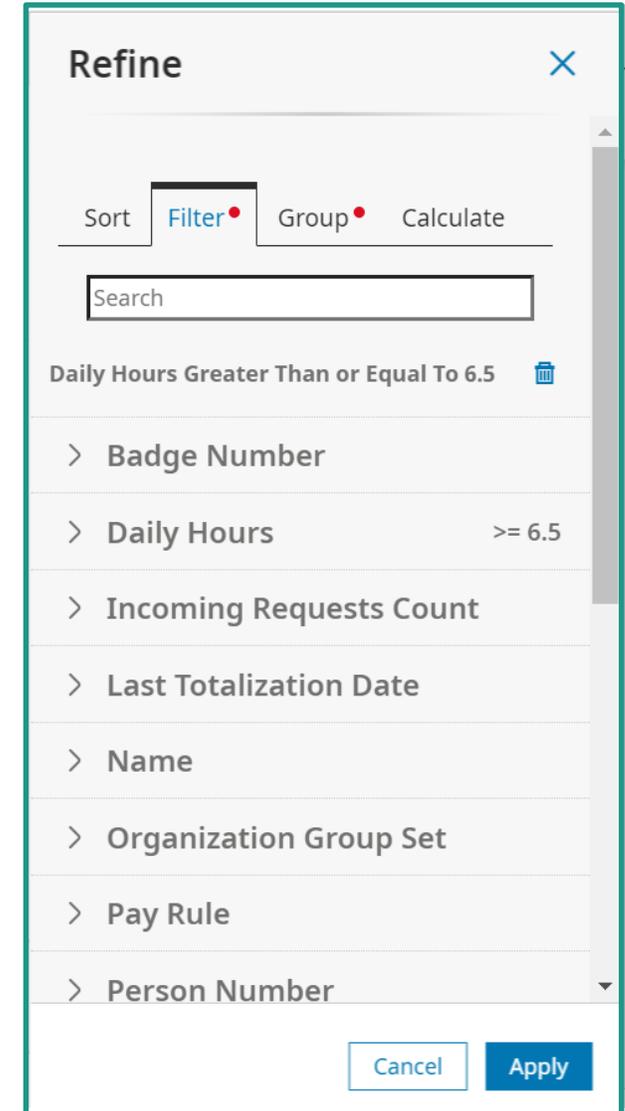
Refine Feature

The Filter Tab

While filters are not available in the drop-down menus for the columns, they can be added using the Refine feature.

There's also a Filter row that once enabled, displays filter options over every column.

In this screen, the Dataview is filtered to only display records where the Daily Hours are ≥ 6.5 .



Dataview Filters

Numeric \ Date \ Date-Time

=	Equal To, includes records matching the value
!=	Not Equal To, excludes records matching the value
> , <	Greater than the value , Less than the value
>=, <=	Greater than or equal to..., Less than or equal to the value
Is Null	Blank, unpopulated value
Is Not Null	Not a blank value
Between	Between one value and another (use semi-colon ';')
Is Not Between	Not between one value and another (use semi-colon ';')

Dataview Filters

Text aka String \ Character

These filter options work the same as the same named numeric filters.

=	Equal To, includes records matching the value
!=	Not Equal To, excludes records matching the value
Is Null	Blank, unpopulated value
Is Not Null	Not a blank value
Between	Between one value and another (use semi-colon ‘;’)
Is Not Between	Not between one value and another (use semi-colon ‘;’)

Dataview Filters

Text-specific Filters

Starts With

Includes records where the value begins with the string / characters entered

Not Starts With

Excludes records where the value begins with the string / characters entered

In

Includes records matching one or more full value

Not In

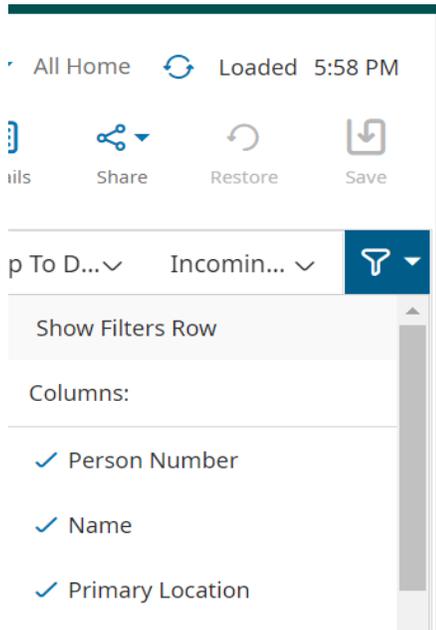
Excludes records matching one or more full value

Custom

Used to provide REGEX filters to include/exclude records

Dataview Filters

The Filter Row



On the far-right side of the column headers, there's a blue funnel icon. Select the icon and choose **Show Filters Row**.

	Person Number	Name	Primary Locati...	Primary Job	Badge Number	Pay Rule	Wage Rate
	Starts With	Starts With	Starts With	Starts With	Starts With	Starts With	=
<input type="checkbox"/>	S3010	Edwards, Matt L	<No Filter> Starts With	Selector		\$S-K4L Hourly We...	12.50
<input type="checkbox"/>	S3069	Tardiff, Gwen S	Not Starts With	Selector		\$S-K4L Hourly We...	18.00
<input type="checkbox"/>	S3021	Catlay, Cho S	Custom	Electrician		CA Hourly Weekly ...	18.00
<input type="checkbox"/>	S3025	Adamec, Tomas S	In	Mechanic		\$S-K4L Hourly We...	25.00

Starts With Filter

Filtering by Job Position

Scenario: We need to return student employees not in a FWS position. In our Dataview, employee groups can be identified by the Pay Rule and ECLS. Non-FWS student positions are a 'W1' ECLS.

Using **Start With**, we can provide the first part of the value "W1" to return employees assigned non-FWS position.

Not Starts With would return records that did not start with "".

Filters are not case-sensitive.

Pay Rule	ECLS
Starts With	Starts With
	W1
TP21 NO LUNCH	W1

In / Not In Filter

Filtering by Position Description

Scenario: We need to return employees assigned to the Job Positions of **PT**, **Electrician** and **Lead**.

The **In** Filter requires fully spelled out values. For multiple values, use a semi-colon (;) as the separator.

Not In would return employees not assigned to the PT, Electrician and Lead positions.

Primary Loc... ▾	Primary Job ↑ ▾	Badge Num... ▾
Starts With ▾	In ▾	Starts With ▾
	Lead;PT;Electrician	
SCo/Logistics/Di...	Electrician	
SCo/Logistics/Di...	Lead	
SCo/Logistics/Di...	PT	

Custom Filters

Scenario: Filter by Job Position

We need to return records where the Job Position contains the word Operator, Forklift Operator, Reach Truck Operator, Turret Truck Operator, Value Add Operator.

We can't use **Starts With** since the first word or two differ.

We could use **In** as long as we type out the names in full and use the semi-colon.

What if we had 500 different Operator positions? If only we had a LIKE filter!!

Custom Filters

Using a Custom Filter

There's no LIKE filter available in the Expressions filter.

Instead, there's a set of characters that function like a wildcard **.***

If we use a Custom filter and apply **.*Operator**, let's see what happens.

Primary Loc... ▾	Primary Job ↑ ▾	Badge Num... ▾
Starts With ▾	Custom ▾	Starts With ▾
	.*Operator	
SCo/Logistics/Di...	Forklift Operator	
SCo/Logistics/Di...	Forklift Operator	
SCo/Logistics/Di...	Forklift Operator	
SCo/Logistics/Di...	Reach Truck Operator	
SCo/Logistics/Di...	Turret Truck Operator	

Custom Filters

Using a Custom Filter

Examples using .* filter against the Job Position Description:

- PT.* Returns the **PT** and the **PT w Cert** jobs
- .*truck.* Returns jobs with truck in the title: Turret **Truck** Operator, Reach **Truck** Operator
- .*an.* Returns jobs that contain 'an', General **Man**ager, Electrician**an**, Materials **Hand**ler
- .*an Returns jobs with 'an' at the end: Electrician**an**
- r.*r Returns jobs that start and end with 'r': **Re**ach Truck Operator, **Re**ceiver

Custom Filters

Using a Custom Filter

Examples using .* filter against Pay Rule Description:

- N.*** Returns any Pay Rule that starts with the letter N
- N.*30.*** Returns Pay Rule that starts with 'N' and has '30' in the middle: **NE11 30MIN LUNCH**, **NE12 30MIN LUNCH**
- .*30.*** Returns any Pay Rule with '30' in it: **NE11 30MIN LUNCH**, **TP11 30MIN LUNCH**

Pay Rule	
Custom	
N.*30.*	
NE11 30MIN LUNCH	

Custom Filters

Reserved Characters

Characters that may need to be “escaped” so they can be taken literally. Please note this is not a comprehensive list.

- Brackets: `[]`
- Parentheses: `()`
- Curly braces: `{}`
- Operators: `*`, `+`, `?`, `|`
- Anchors: `^`, `$`
- Others: `.`, `\`
- In order to use a literal `^` at the start or a literal `$` at the end of a regex, the character must be escaped.
- Some flavors only use `^` and `$` as metacharacters when they are at the start or end of the regex respectively. In those flavors, no additional escaping is necessary. It's usually just best to escape them anyway.

Custom Filters

Not Like ((?!Value).)*

To exclude records that contain “Operator”, use a Custom filter that displays the following:

((?!Operator).)*

Primary Loc... ▾	Primary Job ▾	Badge Num... ▾
Starts With ▾	Custom ▾	Starts With ▾
	((?!Operator).)*	
SCo/Logistics/D...	Lead	
SCo/Logistics/D...	Selector	
SCo/Logistics/D...	Selector	
SCo/Logistics/D...	Mechanic	

Custom Filters

Not Like variation

(?!Value).*

This variation simply excludes records that START with that value, in this case 'm'.

Mechanics have been excluded, but other entries that contain the letter 'm' are still displayed.

Note "General Manager" still included.

In this case, you may as well use NOT STARTS WITH.

Primary Loc... ▾	Primary Job  ▾	Badge Num... ▾
Starts With ▾	Custom ▾	Starts With ▾
	(?!m).*	
SCo/Logistics/Di...	Electrician	
SCo/Logistics/Di...	Electrician	
SCo/Logistics/Di...	Lead	
SCo/Logistics/Di...	Selector	
SCo/Logistics/Di...	General Manager	
SCo/Logistics/Di...	Lead	

Key Takeaways!

Text Filters

- **Starts With \ Not Starts With**
Requires you know the first part of the string.
- **In \ Not In**
Requires you know the entire string and enter it. Multiple values, use ‘;’.
- **Like**
Expression using the .* as a wildcard that stands in for one or more unknown values; either at the start of the value, in the middle or at the end.
- **Not Like**
Expression that uses this format to exclude records: ((?!Value).)*