When to use Additional Criteria?

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In DAS 6.0 there is a new indicator for Additional Criteria. When Additional Criteria are active there is a filter (funnel icon) visible on the ‘run’ bar next to the Design menu.

What is it for? When would I use it? Why don’t I see you use it often? Wow, we have been getting a lot of questions about the Additional Criteria feature! Especially from the more technical folks looking for things they can do in the system. Additional Criteria is pretty close to what its name says – the ability to apply additional or more advanced filter criteria to your report. To locate the Additional Criteria form you go to Design, Additional Criteria. Note you can use either the ‘green triangle Design’ or the menu drop down for Design.

When do you need to use Additional Criteria? In its simplest explanation it is when you need OR logic included in your filtering criteria.

Let’s start with regular filtering - When you put in filters in your DAS report you are setting what is called AND logic. You want Company = 1 AND Business Unit = 30 AND Order Date = 11/12/2012 AND Order Type = S1 with whichever filters you include. By filling in filter boxes you are asking the system to find records that meet all of the criteria you have designated.

Now for Additional Criteria - If you wanted orders that met your criteria but that were EITHER in Company 1 OR in Business Unit 30 then you would need to set that up in Additional Criteria. You would fill in the Order Date and Order Type in the filter boxes since all records must meet those two pieces of criteria. Then you would put the Company and Business Unit criteria in Additional Criteria with an OR in between the definition of the two filters. It would read like this –

Company = 1
Or
Business Unit = 30

Another good way to look at the “or” is the financial quick reports the additional criteria is automatically set to eliminate zeroes. What that statement says from the Quick Report is that if any of the columns listed (which are all the net posting columns and the beginning balance) are not zero then you will get the column. Or, in other words, if all of those are zero then exclude the row.

Now back to that question, Why don’t I see you use it often? The reason we don’t use the Additional Criteria often is that most standard reports don’t use OR logic in their filtering. Also we can have multiple ranges in DAS for a single column and that is a frequent request which can be handled in the standard filter box. An example would be for Object Account, including from 1000 to 1999 and 3000 to 3999. This scenario would be written as: >=1000:<=1999;>=3000:<=3999
And in closing one quick caution… the Additional Criteria are not seen in the filter boxes of the columns included. The only way to see the criteria used in the section is to view it in View, Design Notes or by checking the Additional Criteria window. Please remember to Ask A Trainer if you need help with one of these complex scenarios.