Filtering Tips and Tricks

This job aid will define the various fields on the Member Selector pop-up screen and their functions. It will show you how to select a variable from the Member Selector pop-up, and search a member selector (variable) list by Key and by Text.

Overview of the Member Selector pop-up screen

If you do not know the value to enter for a variable, you may search for it using the Display Member Selector button. Clicking that button brings you to the Member Selector pop-up screen.

Search Field
- Case sensitive.
- Accepts portions of search term(s), i.e., word(s) or number(s).
- Replace spaces with wildcards (asterisks, *) and begin and end with asterisks

Display Drop-Down
- Lists the display (and search) options.
- Recommended: Use Key: Medium Description (if available) for employee names, vendor names, or longer text fields.

Member Display
- Shows the currently selected Display option for the list

Member List
- Click to select one member.

Find Members Binoculars Button
- Click to launch search.

Find Members Binoculars Drop-Down
- Toggle between Key or Text searches.
- Matching Key- or Text-type searches with the data in the Search field will improve the search outcomes.

Return to Member List
- Clears the Search field and displays the original member list again.
- Refreshes the data back to the list before search terms were entered.
- Display and Find Members choices do not switch back to first view however.

Show Selected
- Shows the checked or selected members in one list.
- Useful when you are filtering or selecting multiple items and cannot remember what has been chosen.

Hierarchy Drop-Down
- Only applicable for those characteristics with hierarchies.

OK Button
- Click this to apply your single, selected item to the Variable (prompt) screen.
Individual selection

If you do not know the value to enter for a particular variable, you may search for it by clicking the Display Member Selector button on the Prompt screen.

Click the value to select it and click OK to apply that value to your Prompt screen.

NOTE: To add more individual variables to the Prompt screen, click the plus sign to add another row, and repeat the process above.
Searching by Key

Click the Display Member Selector button. In the text field, type in a portion of the number. Click the Find Members binoculars drop-down and make sure Key is selected. Then click the Find Members binoculars button.

Use the Find Members binoculars drop-down to make sure Key is selected.

Select the option you want to include as a variable by clicking it. Click the OK button to apply the variable.
Searching by Text

If you do not know the value to type in for a particular variable, you may search for it by clicking the Display Member Selector button.

1. Type a key word(s) or portion of a key word(s) in the Search field.
2. Click the Find Members binoculars drop-down and select Text.
3. Click the Find Members binoculars button to launch the search of the key word(s).

4. From the search results, click the one selection you want.
5. Click the OK button to apply the data to the Prompt screen.
Using the Display drop-down to help distinguish data

To further distinguish between the three text entries labeled “SOM Cell Bio Cell Bi,” use the Display drop-down and select Key: Medium Description.
The search now shows more detailed Org Unit names if they are available.