

## Purpose:

To inform the end user about how to properly filter static & dynamic views in D365F&O for more efficient lookup & improved metric tracking

## Revision History:

Revision	Prepared By:	Description of Change	Effective Date
A	Thomas Siegrist	Documented Standard Terminology & Procedure	01/13/2023

## Process(es) required to be completed prior to starting this Work Instruction:

- Review System Terminology ([D705-D365-System Terminology](#))
- Review Basic Navigation in the System ([D706-D365-Navigation Overview](#))
- Review Updating and Adjusting Columns ([D708-D365-Updating and Adjusting Columns](#))
- Review Saved Views ([D704-D365-Saved Views](#))

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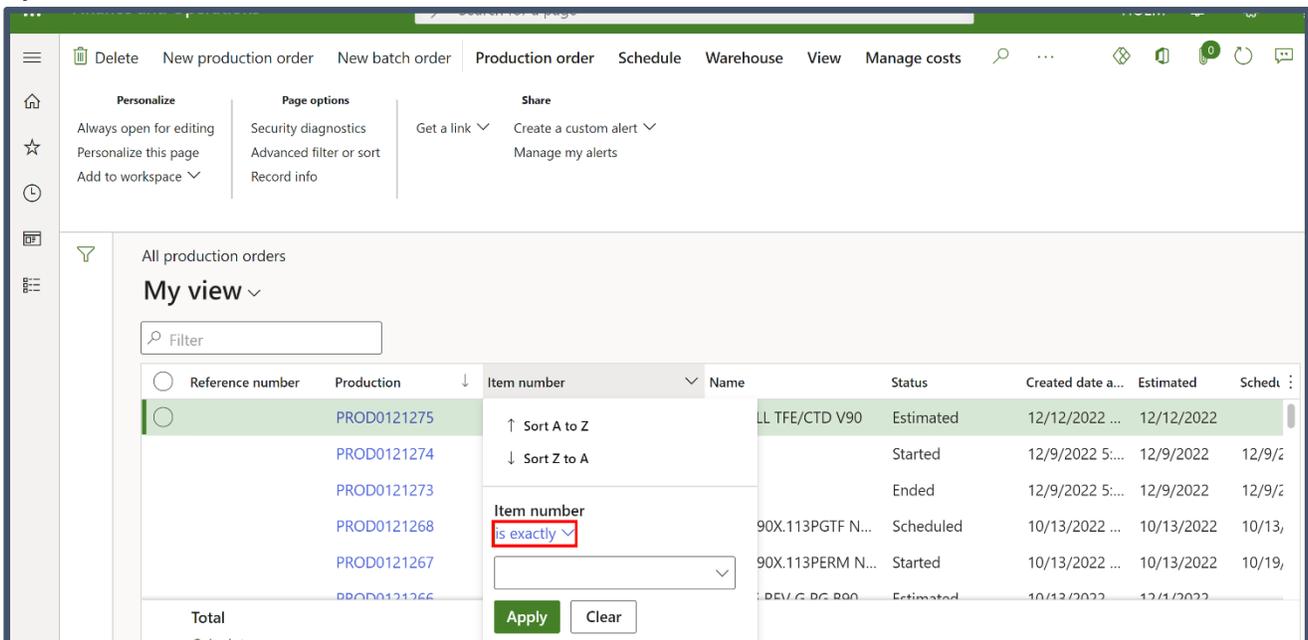
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## Procedure:

### Reviewing Filter Criteria Options:

**Where is the filter criteria dropdown located:** If any column header is selected, the filter criteria is displayed in the blue text under the column header name (see screenshot below)



The screenshot shows the Microsoft Dynamics 365 interface for production orders. A table is displayed with columns: Reference number, Production, Item number, Name, Status, Created date a..., Estimated, and Sched. The 'Item number' column header is selected, and a blue dropdown menu is open below it. The dropdown menu contains the following options: '↑ Sort A to Z', '↓ Sort Z to A', and 'Item number is exactly' (highlighted with a red box). Below the dropdown menu are 'Apply' and 'Clear' buttons. The table data includes rows for production orders with various item numbers and statuses.

**NOTE:** Filter criteria is important for properly filtering in/out data within a view.

## Filtering Criteria Options Available:

Option #1 – General Fields	Option #2 – Date & Time Fields	Option #3 – Quantity Fields
Is exactly Is not Contains Does not contain Begins with Is one of After Before Matches	Is exactly Is not After Before Between Matches	Is equal to Not equal to Greater than or equal Less than or equal Between Matches

## Filtering Criteria use cases:

Option #1 – General Fields	Use Case
Is exactly	Displays a single record that matches the specific text applied
Is not	Displays all records that are not specified
Contains	Include all records that have the specified sequence/series of text
Does not contain	Show all records that DO NOT have the specified sequence/series of text
Begins with	Show all record that being with the specified sequence/series of text
Is one of	Behaves identical to “ <i>is exactly</i> ” but allows multiple records to be entered
After	Unsure of use case – not recommended for use
Before	Unsure of use case – not recommended for use
Matches	Used for dynamic filtering – pair with the appropriate syntax

Option #2 – Date & Time Fields	Use Case
Is exactly	Displays a single record that matches the specific date applied
Is not	Displays all records that are not the specified date
After	Displays all records after a specified date
Before	Displays all records before a specified date
Between	Displays all records between specified dates
Matches	Used for dynamic filtering – pair with the appropriate syntax

Option #3 – Quantity Fields	Use Case
Is equal to	Displays all records that are equal to the specified number
Not equal to	Displays all records that are not equal to the specified number
After	Displays all records after a specified date
Before	Displays all records before a specified date
Between	Displays all records between specified dates
Matches	Used for dynamic filtering – pair with the appropriate syntax

## Building Static Reports:

1.) Navigate to the menu that a report needs to be built for

**Example:** All Production Orders

**NOTE:** For photo example of navigation – refer to the link "[D706-D365-Navigation Overview](#)"

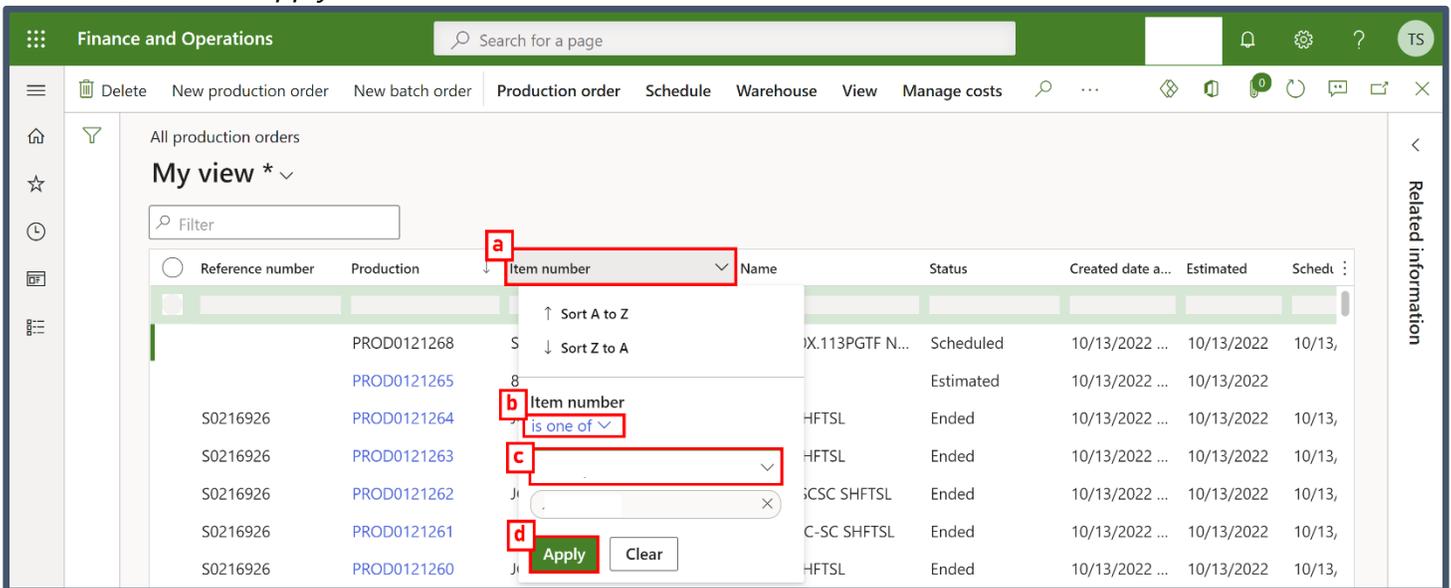
2.) Insert, move, hide, rename, etc. column headers to format the view

**NOTE:** For assistance with this functionality – refer to the link "[D708-D365-Updating and Adjusting Columns](#)"

3.) Insert the appropriate data into the column header filters with the appropriate filter criteria

**NOTE:** Multiple column headers can be filtered

- a) Select the specific column header needing filtered
- b) Set the appropriate filter criteria
- c) Type/Paste the value/text
- d) Select "Apply"



The screenshot shows the SAP Finance and Operations interface. The main area displays a table of production orders. The 'Item number' column header is selected, and a dropdown menu is open, showing filter options like 'Sort A to Z', 'Sort Z to A', and 'Is one of'. A red box labeled 'a' highlights the 'Item number' header. Another red box labeled 'b' highlights the 'Is one of' filter option. A third red box labeled 'c' highlights the input field where a value is being entered. A fourth red box labeled 'd' highlights the 'Apply' button at the bottom of the dropdown menu.

Reference number	Production	Item number	Name	Status	Created date a...	Estimated	Sched :
	PROD0121268	S	X.113PGTF N...	Scheduled	10/13/2022 ...	10/13/2022	10/13,
	PROD0121265	8		Estimated	10/13/2022 ...	10/13/2022	
S0216926	PROD0121264	J	HFTSL	Ended	10/13/2022 ...	10/13/2022	10/13,
S0216926	PROD0121263	J	HFTSL	Ended	10/13/2022 ...	10/13/2022	10/13,
S0216926	PROD0121262	J	CSC SHFTSL	Ended	10/13/2022 ...	10/13/2022	10/13,
S0216926	PROD0121261	J	C-SC SHFTSL	Ended	10/13/2022 ...	10/13/2022	10/13,
S0216926	PROD0121260	J	HFTSL	Ended	10/13/2022 ...	10/13/2022	10/13,

**IMPORTANT:** Don't forget to save your view!

**NOTE:** For assistance with this functionality – refer to the link "[D704-D365-Saved Views](#)"

## Building Dynamic Reports:

**Important:** Dynamic reports are configured the same way static reports are configured except for one or two fields set with the below syntax

**Purpose:** To create a report that updates/displays information based on a set range

**Example:** View all sales order lines expected to ship this upcoming week and/or Past due based on today's date

### 1.) Navigate to the menu that a report needs to be built for

**Example:** Open Sales Order Lines

**NOTE:** For photo example of navigation – refer to the link "[D706-D365-Navigation Overview](#)"

### 2.) Insert, move, hide, rename, etc. column headers to format the view

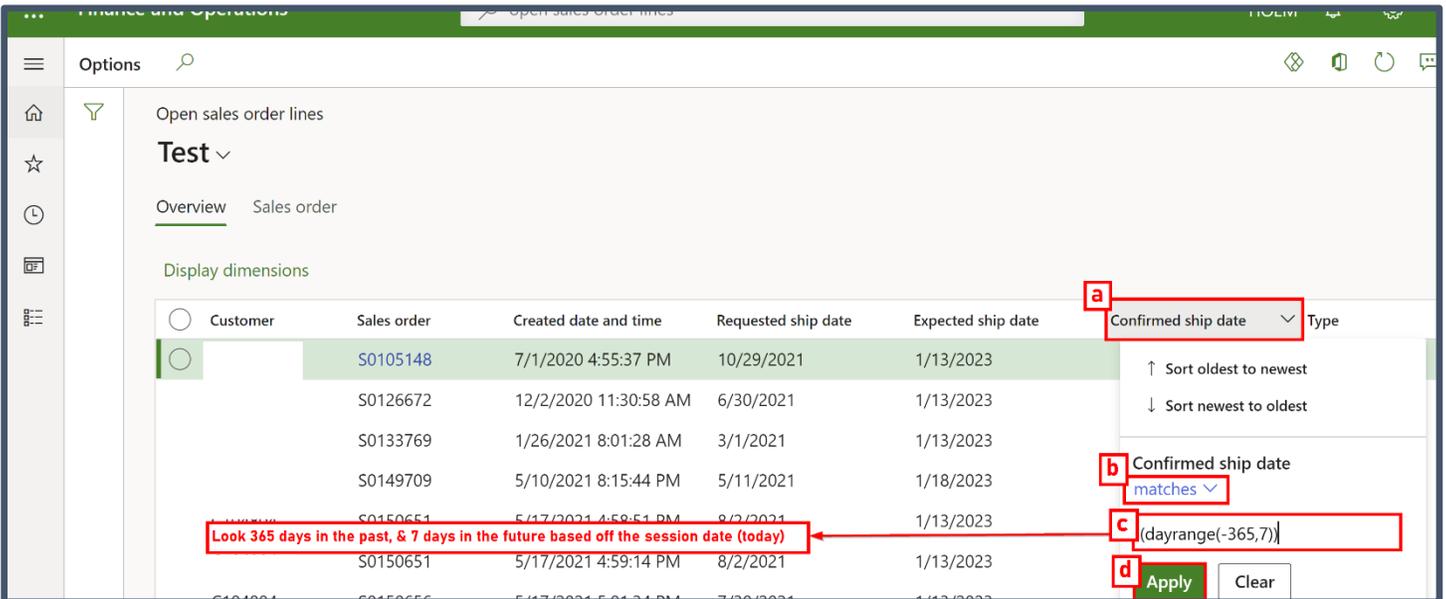
**NOTE:** For assistance with this functionality – refer to the link "[D708-D365-Updating and Adjusting Columns](#)"

### 3.) Insert the appropriate syntax into the column header filters with the "Matches" filter criteria

- Select the specific column header needing filtered
- Set the appropriate filter criteria
- Enter the appropriate filter syntax

**NOTE:** A link to Microsoft's syntax filter options is at the bottom of the page

- Select "Apply"



The screenshot shows the Dynamics 365 interface for 'Open sales order lines'. A table displays columns: Customer, Sales order, Created date and time, Requested ship date, Expected ship date, Confirmed ship date, and Type. A filter is applied to the 'Confirmed ship date' column with the criteria '(dayrange(-365,7))'. A red box labeled 'a' highlights the 'Confirmed ship date' column header. A red box labeled 'b' highlights the 'Confirmed ship date matches' dropdown menu. A red box labeled 'c' highlights the filter criteria '(dayrange(-365,7))'. A red box labeled 'd' highlights the 'Apply' button. A red arrow points from a note box to the filter criteria. The note box contains the text: 'Look 365 days in the past, & 7 days in the future based off the session date (today)'.

## RECOMMENDED BOOKMARK FOR FUTURE USE:

<https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/get-started/advanced-filtering-query-options>

**IMPORTANT:** Don't forget to save your view!

**NOTE:** For assistance with this functionality – refer to the link "[D704-D365-Saved Views](#)"

## Column Header & Footer Tools:

### Column Header Options:

**Freeze Column** – Provides visibility to frozen fields when scrolling

**NOTE:** When freezing a column, the column/data will be snapped to far left of the grid

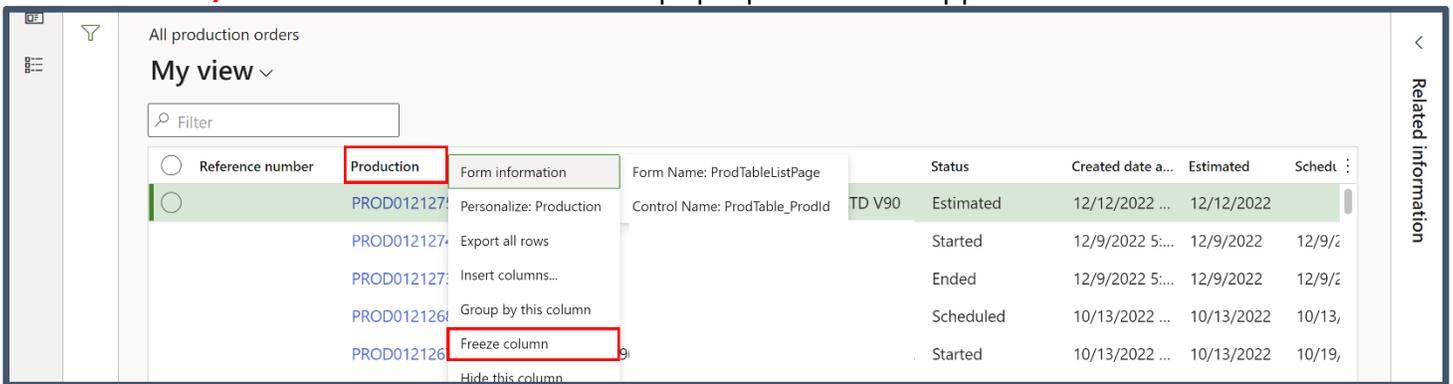
### How to Freeze a column:

1.) Navigate to the menu that needs a column frozen

2.) Freeze a column

a) Right-click (*on the mouse*) the column that needs frozen

b) Select "Freeze Column" in the pop-up menu that appears

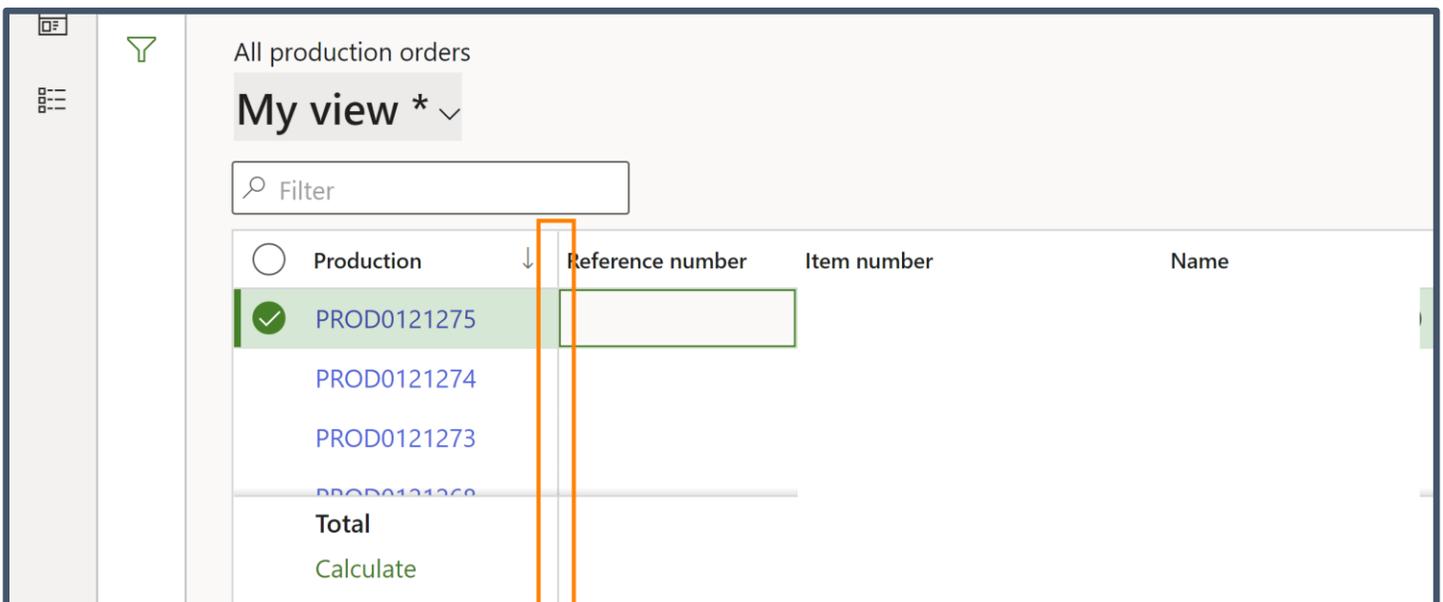


The screenshot shows a table titled "All production orders" with a view selector "My view". A context menu is open over the "Production" column header. The menu items are: "Personalize: Production", "Export all rows", "Insert columns...", "Group by this column", "Freeze column", and "Hide this column". The "Freeze column" option is highlighted with a red box. The table data includes columns for Reference number, Production, Form information, Status, Created date, Estimated, and Sched.

### **Example of Frozen Field:**

**IMPORTANT:** To unfreeze a column, perform the exact steps above.

**NOTE:** A gray bar appears to separate the frozen columns from the rest of the grid



The screenshot shows the same table as before, but now the "Production" column is frozen. A vertical gray bar is visible between the "Production" and "Reference number" columns. The "Production" column header has a checkmark icon, and the first row of data has a checkmark in the "Production" column. The table data includes columns for Production, Reference number, Item number, and Name.

**\* Proceed to the next page to review "group by" column header functionality\***

## Column Header Options continued...

**Group By Column** – Organizes information within the system for quick analysis/viewing

**NOTE:** Multiple columns can be grouped in a report, this will create a hierarchy of grouping

### How to Group a column:

1.) Navigate to the menu that needs a column frozen

2.) Group by a column

a) Right-click (on the mouse) the column that needs grouped

b) Select "Group by this column" in the pop-up menu that appears

**IMPORTANT:** To Collapse/Expand all grouped data, select the "⋮" in the column header

## Footer Options:

How to add the footer to the grid

1.) Navigate to the menu that needs a footer added to the report

**Example:** All Production Orders

2.) Insert a column into the grid

a) Select the "⋮" on the far-right side of the column headers OR right-click the column header

b) Select "Show Footer"

**IMPORTANT:** Select "Calculate" on the bottom left to calculate the footer sums

**IMPORTANT:** Select the "+" sign in the footer too add that columns footer sum