

Filtering Queries Made Easy



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Running a query can produce robust, and sometimes overwhelming, results. Filtering query results can help reduce unnecessary data and provide a more organized list that prioritizes the data you need. In this week's Tech Tip, we'll show you how to filter a query - saving you time and improving your search results.

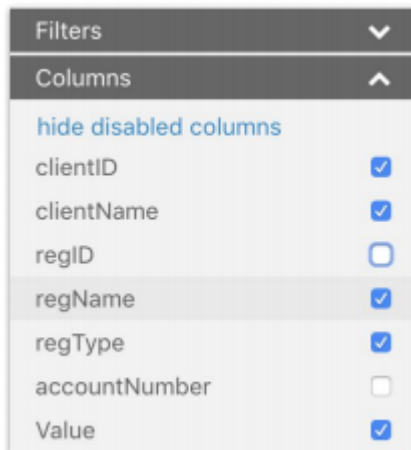
How to filter a query:

Each query is made up of columns designed to pull in specific sets of information. In the header field, you will see the name of the data in each column. Below the column header is an open text field, which can be used to help you filter down to a specific item within a query.

For example, if there is a specific Household ID within a query that you are looking for, simply type in the ID (1) in the Household ID column (as long as the column is available in the query) and all households that do not contain that ID will be removed from the list.

| Home > Query > Holdings Report | | | | |
|--------------------------------|-------------|-------|----------------------|------------------------|
| clientID ▾ | clientName | regID | regName | regType |
| 77 | | | | |
| 77 | Troy Aikman | 157 | Troy Aikman | Individual Retireme... |
| 77 | Troy Aikman | 163 | Susan Aikman | Individual Retireme... |
| 77 | Troy Aikman | 166 | Troy & Susan Aikm... | JTWROS |
| 77 | Troy Aikman | 157 | Troy Aikman | Individual Retireme... |
| 77 | Troy Aikman | 157 | Troy Aikman | Individual Retireme... |

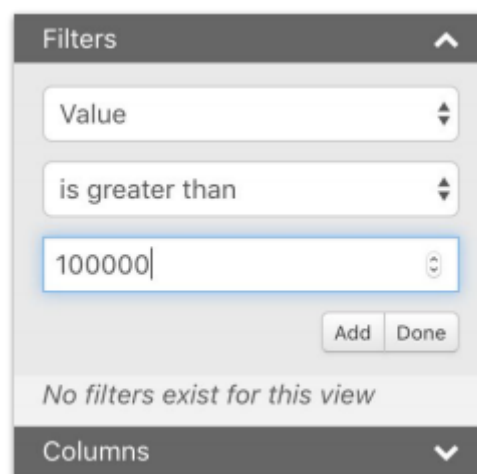
If there are columns within a query that are not needed, those can also be filtered out. To disable a column from showing, simply select the Columns drop-down on the right side of the screen and uncheck any columns that are not needed. Note: The order of the columns can be adjusted by dragging and dropping them into the desired location.



How to add a filter:

Remember, filters can be added to queries to remove certain pieces of information. Similar to creating filters for dynamic groups in the Grouping Manager app, a filter can be applied to a query to have information hidden when reviewing the query.

For example, a filter can be applied so that only registrations with a value greater than 100,000 will show when reviewing the query. The only restriction for applying a filter is that the column must be present in the query to be able to filter by that specific level of information.



Make queries work for you:

The Query app is an amazing tool that can be utilized to provide large amounts of data to empower every firm to run their business effectively. Use the ability to filter queries to focus on the data that matters most to you.

If you have any questions or need additional help, email the Reporting team at reporting@orionadvisor.com.

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