Navigate360: Understanding Condition & Logic Filters in V3

A table of contents explaining V3 conditions and logics.

Data Filters

- Filter conditions in V3 Reports have three parts:
  - **Field** – a data filter that holds one type of information (EX: The *Care Unit field* stores the name of a Care Unit)
  - **Condition** – a logical operator used to determine the results when combined with the *Field* and *Value*
  - **Value** – the specific information in the field that the user is trying to find, or eliminate, from the report results

Filter Logic

- Filter Logic options determine how criteria is interpreted. By default, Navigate360 reports will match all filters, but a user has the ability to edit the logic

Option	Description
Match all Filters (AND)	Use the *Match all Filters* option to create a logical condition that requires all specified criteria to be true for a record to be included in the report results. **AND** logic will narrow results. This is the system's default logic filter.
Match any Filters (OR)	Use the *Match any Filters* option to a logical operator that connects multiple decisions, where at least one condition must be true for a record to be included in the report results. **OR** logic broadens results.
Advanced (AND/OR)	Use the *Advanced* option to create more complex filter logic when creating a report by nesting filters. This allows use of both **AND** and **OR** filters in a single filter logic. (EX: Filter 1 **AND** (Filter 2 **OR** Filter 3)

Conditions for Data Fields

- The following table explains each Condition that appears when a user selects a Field and the values that appear when selected:

Condition Name	Description	Value Examples w/ Condition
Date Range	The action was taken within the selected date range by the user, including *Start* and *End Dates*	*Start Date* and *End Date* with a dropdown calendar
Last	Results created/adjusted/deleted refer to the previous X full days, *excluding* the current day	1 day, 5 days, 7 days, 14 days, 30 days, 1 calendar week, 2 calendar weeks, 90 days, 1 year
Next	Results created/adjusted/deleted refer to the upcoming X full days, *excluding* the current day	1 day, 5 days, 7 days, 14 days, 30 days, 1 calendar week, 2 calendar weeks, 90 days, 1 year

Navigate360: Understanding Condition & Logic Filters in V3

A table of contents explaining V3 conditions and logics.

Current	Results created/adjusted/deleted during the ongoing period	Day, Week, Month, Year
Since	Results created/adjusted/deleted refer to a starting point in time and all data from that point forward, *including* the current date	Date field (MM/DD/YYYY)
Before	Results created/adjusted/deleted before a certain date, not including the specified date	Date field (MM/DD/YYYY)
After	Results created/adjusted/deleted after a certain date, not including the specified date	Date field (MM/DD/YYYY)
Is Empty	Indicates there is no data in the field selected	N/A; choosing this condition means no values appear
Is Not Empty	Indicates the field has data and will often be used to pull up all data in a report	N/A; choosing this condition means no values appear

Conditions for Fields with a List of Values

- A *Field* with a list of *Values* is any field where data is limited to a list of values (EX: *Categories*, *Classification*, *Tags*, etc.)
- The table below explains each *Condition* that appears when the user selects a *Field* with a list of *Values* for a filter and what results populate based on the condition:

Condition	Description
Contains Any	If this condition is selected, if records match **ANY** of the values selected from the dropdown, it will appear in the search results
Does Not Contain Any	If this condition is selected, only records that match **NONE** of the values selected will appear in the search results
Contains All	If this condition is selected, if a record matches **ALL** of the values selected from the dropdown, it will appear in the search results
Does Not Contain All	If this condition is selected, if a record does *not* match **ALL** of the values selected from the dropdown, it will appear in the search results
Is Empty	Indicates there is no data in the field selected
Is Not Empty	Indicates the field has data and will often be used to pull all data in a report if used as the condition in the only filter

Continue to next page…

Navigate360: Understanding Condition & Logic Filters in V3

A table of contents explaining V3 conditions and logics.

Conditions for Free Text Fields

- A free text *Field* is any field where the data is entered and cannot be standardized into a list (EX: *First Name*, *Last Name*, *Email*, *Creator ID,* etc.)
- The table below explains each Condition that appears when the user selects a free text field for a filter:

Condition	Description
Contains	The condition is applied to text fields or collections of data to find elements that contain a specified substring, value, or element (EX: Using *Contains* to find "Smith" will generate any name with Smith in it)
Is	Only items that exactly match the given value or combination of values will be included in the report. Items with slight variations or partial matches will be excluded.
Is Not	Only records that do not equal the string entered in the *Value* field will display in the search results
Is Empty	Indicates there is no data in the field selected
Is Not Empty	Indicates the field has data and will often be used to pull all data in a report if used as the condition in the only filter
Starts With	Only records that start with the string entered in the *Value* field display in the results
Ends With	Only records that end with the string entered in the *Value* field display in the results
From	Only records after the value is entered will be returned in the results
To	Only records up to the value entered will be returned in the results
Between	Only records between the two values entered will be returned in the results (EX: the filter *Credits Earned* + *Between* + *Low: 12* and *High: 15* returns students who have earned between 12 and 15 credit hours)
Any	Enter a list of comma-separated or space-separated works, and only get results if the field matches *any* of the words
None	Enter a list of comma-separated or space-separated works, and only get results if the field matches *none* of the words

Navigate360: Understanding Condition & Logic Filters in V3

A table of contents explaining V3 conditions and logics.

Conditions for Yes/No Fields

- A *Yes/No field* is any field where the information stored in the field is simply Yes or No, or true/false (EX: *Has Attachment?*, *Has Scheduled Appointment*, *Completed Study Hall Requirement*, etc.)
    - **NOTE:** If a Yes/No field is applied, typically users are trying to find students who still need outreach
- The table below explains each Condition that appears when the user selects a *Yes/No field* for a filter. The values that appear for the *Is/Is Not* conditions will be Yes or No (True or False):

Condition	Description
Is	Used to affirmatively choose the value
Is Not	Used to select what the value is not
Is Empty	Indicates there is no data in the field selected
Is Not Empty	Indicates the field has data and will often be used to pull data in a report if used as the condition for a single filter