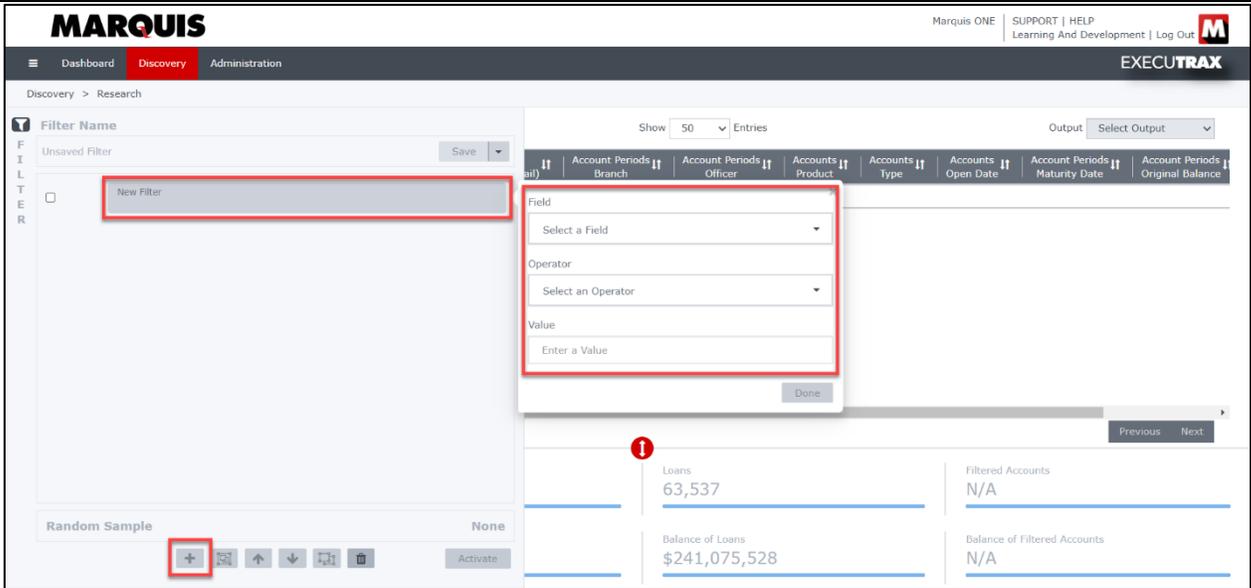
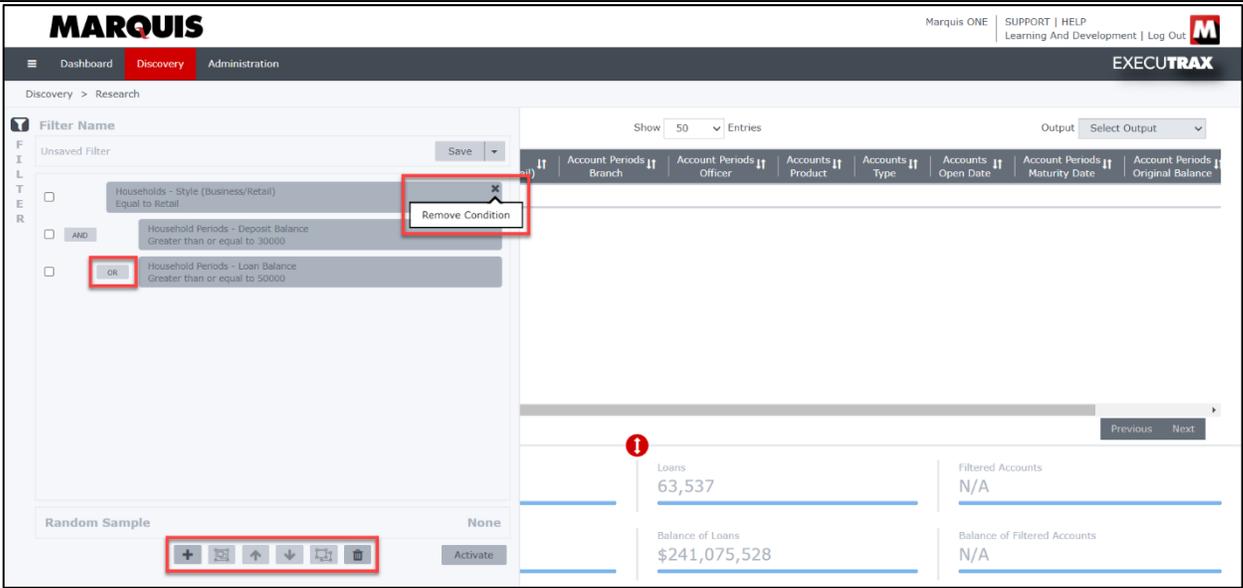


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MNET201	Business Insights 3 Step Filtering Overview
	The following procedures will guide through creating filters using the 3 Step filter method available in the Discovery tool within Business Insights.
Order of Steps	Tasks
Step 1	Log into Business Insights
Step 2	Click on Discovery from the main menu
Step 3	Click Research
Step 4	The filter window should be extended. If it isn't, click the Filter  icon to extend it
Step 5	Click on the  located in the bottom left hand side of the page to add a new condition box
Step 6	Click on the empty condition box and a three-step box will appear containing: Field, Operator and Value
Step 7	Select a Field
7.1	Click the drop-down arrow in the Field box
7.2	Click on a field to select it
Note: A search function can be applied for the Field. Simply begin typing in the box and any fields that contain the entered set of characters will display below in the available list.	
Step 8	Select an Operator
8.1	Click the drop-down arrow in the Operator box
8.2	Click on an operator to select it
Step 9	Select the Value(s)
9.1	Type in the Value or click the drop-down arrow to select a lookup value if the field contains any lookup values available
9.2	If more than one value is desired, click the plus symbol within the Value box
Note: Typing in the box will apply the search function to make it easier to locate specific values.	
Step 10	Click Done once all selections are made
	
Step 11	To add more filter conditions, click on the  and another condition box will appear
11.1	The default connector is AND

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11.2	To switch it to “OR”, click on the connector to toggle between connector options									
11.3	Follow steps 8 – 11 for building the filter condition									
Step 12	To group 2 or more “OR” statements, place a check mark in the boxes to the left of the filter condition boxes									
12.1	Click the “ Group Conditions ” button  , located directly to the right of the plus symbol.									
Note: The Group Conditions is used when needing to combine more than one OR condition to apply as a single application. For example, if we are looking to find records that are Retail and have either \$30,000 in Deposits OR \$50,000 in Loans, we would want to group the deposit and loan conditions in order to apply the Retail condition to both.										
Step 13	To ungroup conditions, place a check mark in the boxes to the left of each filter condition box that has been grouped									
13.1	Click the “ Ungroup Conditions ” button  , located directly to the left of the trash can symbol.									
Step 14	To remove a filter condition, click the “X” in the upper right hand corner of the condition box									
	 <p>The screenshot shows the MARQUIS Discovery interface. The 'Filter Name' window is open, showing two filter conditions: 'Households - Style (Business/Retail) Equal to Retail' and 'Household Periods - Deposit Balance Greater than or equal to 30000'. The 'OR' connector is selected between them. A red box highlights the 'Remove Condition' button on the first filter condition. Another red box highlights the 'OR' connector. A third red box highlights the 'Activate' button at the bottom of the filter window. The main interface shows a list of filter conditions and a summary table with the following data:</p> <table border="1"> <thead> <tr> <th>Filter Name</th> <th>Loans</th> <th>Filtered Accounts</th> </tr> </thead> <tbody> <tr> <td>Households - Style (Business/Retail) Equal to Retail</td> <td>63,537</td> <td>N/A</td> </tr> <tr> <td>Household Periods - Deposit Balance Greater than or equal to 30000</td> <td>Balance of Loans \$241,075,528</td> <td>Balance of Filtered Accounts N/A</td> </tr> </tbody> </table>	Filter Name	Loans	Filtered Accounts	Households - Style (Business/Retail) Equal to Retail	63,537	N/A	Household Periods - Deposit Balance Greater than or equal to 30000	Balance of Loans \$241,075,528	Balance of Filtered Accounts N/A
Filter Name	Loans	Filtered Accounts								
Households - Style (Business/Retail) Equal to Retail	63,537	N/A								
Household Periods - Deposit Balance Greater than or equal to 30000	Balance of Loans \$241,075,528	Balance of Filtered Accounts N/A								
Step 15	To apply the filter just built, click the Activate button on the bottom right hand side of the filter box									
15.1	The filter window should slide away, displaying those records that match the filter criteria just activated									
15.2	If the Filter window doesn't slide out of view, click the Filter icon to toggle it out of the way to view the qualified records									
Step 16	To remove ALL filter condition boxes within the window, click the  button at the bottom of the filter window									