Creating Filters for Profiles and Scorecards
Using Informatica Analyst
Abstract

You can add, edit, or delete filters in a profile. A filter determines the rows that the profile reads at run time. The profile does not process rows that do not meet the filter criteria. When you create a filter for a profile or scorecard, the profile or scorecard runs on the filtered data. This article describes how to create filters for a profile and apply the filters in the scorecard that you create from the profile results.

Supported Versions

- Data Quality 10.0

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Overview

You can create multiple filters for a profile but only one filter can be active at a time. You can select and apply the filter to the profile to make the filter an active filter. When you run the profile, the profile uses the active filter to filter the data, and runs the profile on the filtered data. The summary view displays the profile results for the filtered data.

When you run a profile with an active filter and create a scorecard on the profile results, the following process takes place:

1. The scorecard inherits all the filters.
2. By default, the active filter in the profile is assigned to all the metrics in the scorecard.

Therefore, to run the scorecard based on any other filter in the profile, you can edit the scorecard and apply the filter. You can assign different filters to different metrics as required.

The following sections explain how to create multiple filters for a profile, generate a scorecard where the active filter is assigned to the metrics by default, and how to apply a different filter to the scorecard.

Business Example

You are a data analyst for a retail organization that has three stores located in San Francisco, Austin, and Seattle. As part of a business requirement, you perform data analysis across all the data sources on a monthly basis. You want to view the sales and the data quality scores for all the stores and individual stores in December 2015. This example focuses on the sales and the data quality scores for all the stores and the San Francisco store.

To fulfill the business requirement, you perform the following tasks:

1. Create and run a profile on the order table, filtering December 2015 sales from the San Francisco store.
2. Edit and run the profile, filtering December 2015 sales for all the stores.
3. Generate a scorecard that inherits the active filter to view the scores for all the stores in December 2015.
4. Apply a different filter to the scorecard to view the scores for the San Francisco store in December 2015.
To view the sales for the San Francisco store in December 2015, you can filter the data based on the columns Store_Name, Order_Month, and Order_Year in the Order_Table. To view the sales across all the stores in December 2015, you can filter the data based on Order_Month and Order_Year in the Order_Table.

Creating a Filter to View the Sales for a Store

You can add filters to a profile when you create or edit the profile. The profile runs on the filtered data of the active filter. The summary view displays the results for the filtered data. You can create a filter to view the sales for the San Francisco store in December 2015.

1. In the Discovery workspace in Informatica Analyst, click New > Profile in the header area.
   The New Profile wizard appears.
2. Select Single source to create a column profile. Click Next.
3. In the Specify General Properties, enter the name of the profile as OrderByMonth, and select a location to save the profile.
4. Click Next.
   The Select Source screen appears.
5. In the Select Source screen, choose the data object as Order_Table.
6. Click Next.
   The Specify Settings screen appears.
7. In the Specify Settings screen, click Next.
   The Specify Rules and Filters screen appears.
   The following image shows the Specify Rules and Filters screen in the New Profile wizard:

8. In the Specify Rules and Filters screen, click Actions > Create Filter in the filter pane.
   The following image shows the Create Filter option in the Actions menu:
9. In the **New Filter** dialog box, select **Simple** filter.

10. To create a filter, enter the following details:
   - **Name.** Enter ByMonth as the filter name.
   - Optionally, enter a description for the filter.
   - Enter the filter criteria for the ByMonth filter as:
     - Store_Name = San Francisco
     - Order_Month = Dec
     - Order_Year = 2015

The following image shows the **New Filter** dialog box:

11. Click **OK.**
12. In the **Specify Rules and Filters** screen, click **Save and Run** to save and run the profile.

The following image shows the profile results for the filtered data in summary view:

![Profile Results](image)

**Creating a Filter to View the Sales Across All the Stores**

You can create a filter for the OrderByMonth profile to filter data for all the stores for December 2015. The profile runs on the filtered data. The summary view displays the profile results for all the stores sales.

1. In the **Library** workspace, click the **OrderByMonth** profile to open the profile.
   
   The profile results for the profile with the active filter ByMonth appears in the summary view.
2. In the summary view, click **Actions > Edit Profile**.
   
   The **OrderByMonth** profile wizard appears.
3. Click **Specify Rules and Filters**.
   
   The **Specify Rules and Filters** screen appears.
4. In the **Specify Rules and Filters** screen, click **Actions > Create Filter** in the filter pane.
5. In the **New Filter** dialog box, select **Simple** filter.
6. To create a filter to view the sales for all the stores in December 2015, enter the following details:
   
   - **Name.** Enter **ByMonthAllStores** as the filter name.
   - Optionally, enter a description for the filter.
   - Enter the filter criteria for the **ByMonthAllStores** filter as:
     - Order_Month = Dec
     - Order_Year = 2015
7. Click **OK**.
8. In the **Specify Rules and Filters** screen, select the **ByMonthAllStores** filter in the Filter pane.
   
   The following image shows the active filter in the Filter pane.
9. Click **Save and Run** to save and run the profile.  
   The summary view displays the profile results for all the stores in December 2015.

### Creating a Scorecard for a Profile with an Active Filter

When you create a scorecard from the profile results for a profile with an active filter, the scorecard inherits the filter. The scorecard runs on the filtered data of the active filter.

1. In the **Library** workspace, click the **OrderByMonth** profile to open the profile.  
   The profile results for the profile with the active filter ByMonthAllStores appears in summary view.

2. In the summary view, click **Actions > Add to Scorecard**.  
   The **Add to Scorecard** dialog box appears.

3. In the **Add to Scorecard** dialog box, select **New Scorecard**. Click **Next**.  
   The **Step 2 of 7** screen appears.

4. In the **Step 2 of 7** screen, enter the name of the scorecard as **ViewByMonth**, and select a location to save the scorecard. Click **Next**.  
   The **Step 3 of 7** screen appears.

5. In the **Step 3 of 7** screen, select all the columns. Click **Next**.  
   The following image shows the **Step 4 of 7** screen with the metrics and the active filter in the profile that the scorecard inherits:

   ![Add to Scorecard: Step 4 of 7](image)

6. In the **Step 4 of 7** screen, click **Next**.

7. In the **Step 5 of 7** screen, select the metrics, values, metric thresholds, and cost of invalid data as required. Click **Next**.

8. In the **Step 6 of 7** screen, click **Next**.
9. In the Step 7 of 7 screen, click Save & Run.

   The scorecard results for the profile with the ByMonthAllStores filter appears.

### Applying a Filter to the Scorecard

When you create a scorecard on a profile with an active filter, the scorecard inherits all the filters. By default, the active filter is assigned to the metrics. To view the scorecard for a different filter in the profile, you can edit the scorecard, apply the filter, and run the scorecard.

1. In the Scorecard workspace, click the ViewByMonth scorecard to open the scorecard.
   
   The scorecard results appear.

2. Click Actions > Edit > Scorecard Filters.
   
   The following image shows the Scorecard Filters option in the Actions menu.

   The Edit Scorecard dialog box appears.

3. In the Edit Scorecard dialog box, select a metric in the Metric Filters pane, and click Manage Filters.
   
   The following image shows the Manage Filters option to apply the scorecard filters:
The Edit Filter dialog box appears.

4. In the Edit Filter dialog box, select the ByMonth filter, and select the Apply selected filter to all metrics option.

The following image shows the Edit Filter dialog box:

![Edit Filter dialog box image]
5. Click **OK**. The **Edit Scorecard** wizard appears.

6. Click **Save & Run** to save and run the scorecard.
   
The scorecard results for the filter **ByMonth** appears.

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