

Programming -- Sorting & Filtering Your Reports

WorkCenter offers you the ability to quickly sort, filter and program existing reports or create new reports from the existing standard reports.

This video will give you steps in filtering, sorting and programming your reports. For this example, we will again work with the “All Loans” report. Open this report by double clicking on the report name.

Step #1: Programming by selecting the appropriate columns you wish displayed in your report: Click on the “View Visible Columns Icon” at the top left corner of your report. This icon looks like 5 small lines stacked on top of each other. Your report columns are displayed when you check the box next to the name in the drop down menu. If you do not wish to display a specific column, uncheck the box.

Step #2: Sorting the Report by a specific column heading: You will now want to sort this report by a particular column order. You do that with a single mouse click on your desired column heading. If you again click on the heading, you will notice the report is sorted in reverse order. For our example, we want this report to load sorted by the “Borrower Name” column.

Step #3: Filtering your report for desired data content: WorkCenter will allow you to filter your database report using the “Filter Data Icon” which looks like a “Flood Light” and can be located at the bottom of your report. You have the option to filter by one or multiple criteria when designing your specific reports.

1. After clicking on the filter data icon, you will notice a screen view appear. You will see a button asking you to press this to add a new condition. Once this is done, a second line will appear with a default line setting.

For this report, we have decided to filter the all loans report by Interest rates greater than 6% and loan type to be equal to Conventional loans.

All you need to do is to click on the first line name and select “Interest Rate”, move to the second item and select “Great Than” and then type “6.0” in the third box. This will represent your first filtering of all loans greater than 6.0%

Click on the box to add a new condition and repeat the same process. This time you will want to select “LoanType” “Equals” “Conventional”.

If you wish additional conditions, simple repeat the process. Once you have the desired filtering, click the box “Apply” and then “OK”.

Step #4: You can now arrange your columns and add footers or totals to this report as explained in the other flash videos pertaining to Reports. When you have the desired report, save the report with a right mouse click on any line item in the report and select “Save Report As.....” Name the report an appropriate name.

These reports are real time reports. The next time you sync loans into your database that meet the criteria established in the report, the loan will automatically be added to the report.