

## Filter Based on a List of Values from Excel

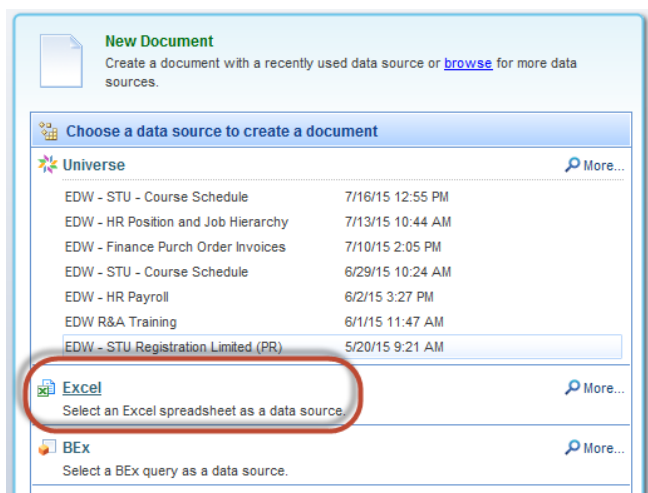
Follow these steps if you have a list of values (for example, UINs) in an Excel spreadsheet, and you would like to use this list as a query filter.

### *Step 1: Prepare the Excel Spreadsheet*

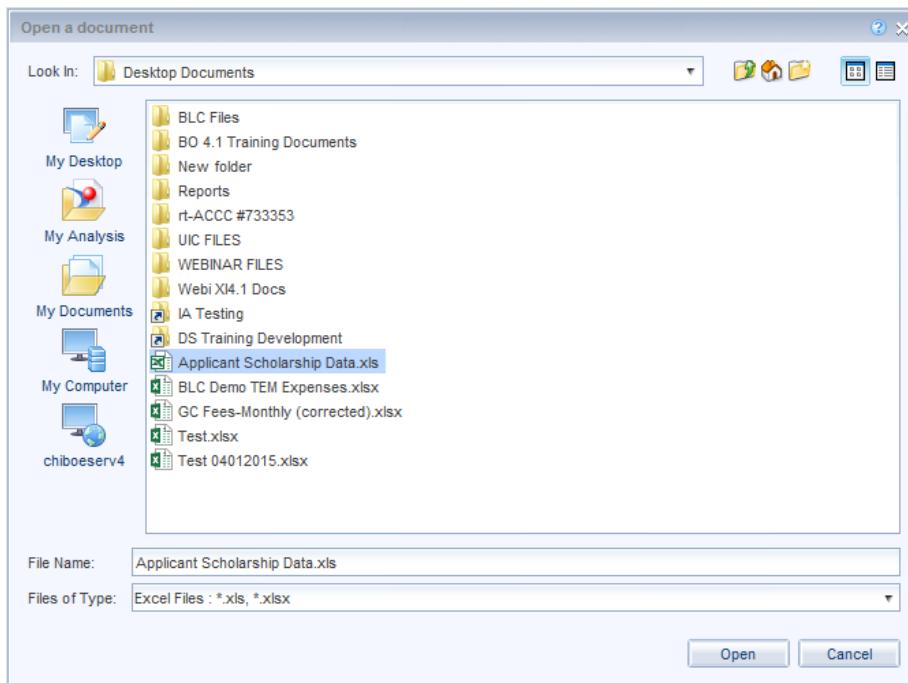
- If your Excel list contains more than 1000 rows, you will need to break this list up into individual list of 1000 rows or less. See [If you have more than 1000 rows in the excel spreadsheet](#) at the end of this document.
- If your Excel spreadsheet contains UINs, format the cells as text in Excel prior to creating your query.

### *Step 2: Create first query using the Excel Document as the data source.*

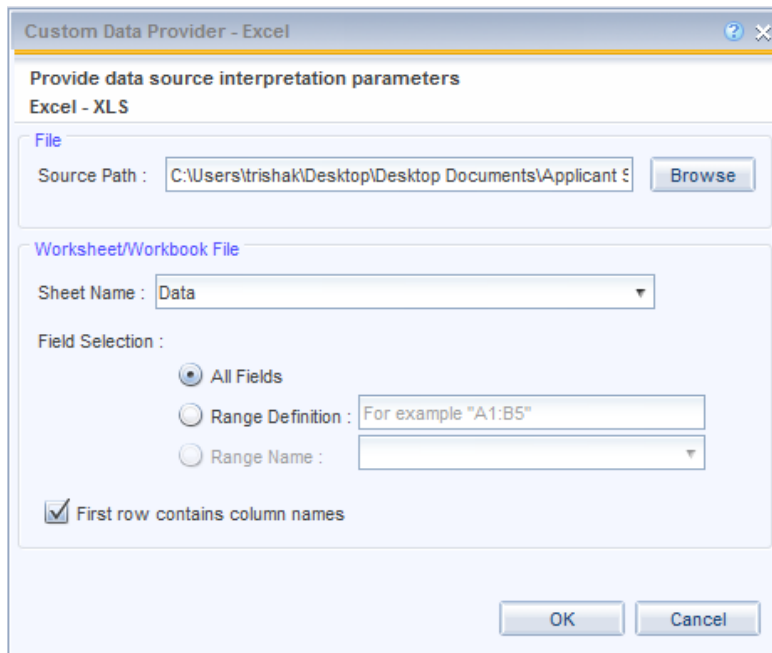
1. In Web Intelligence Rich Client, select **Excel** from the New Document Data Source list.



2. Browse your computer to locate the desired Excel Spreadsheet.



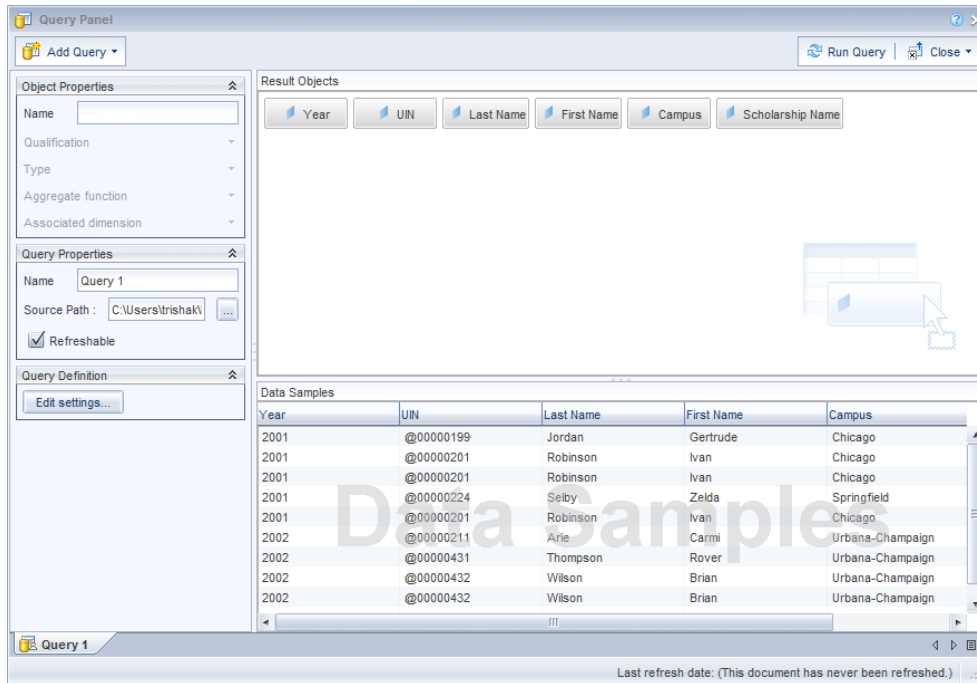
3. Select the document and click **Open**.



4. If necessary, select the desired worksheet from the **Sheet Name** drop-down list. The default will be the first sheet in the Excel Workbook.




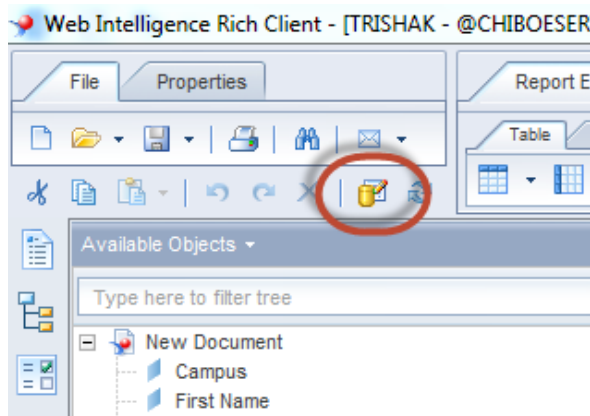
- Click **OK**
- The **Query Window** is displayed showing the objects created from your Excel list.



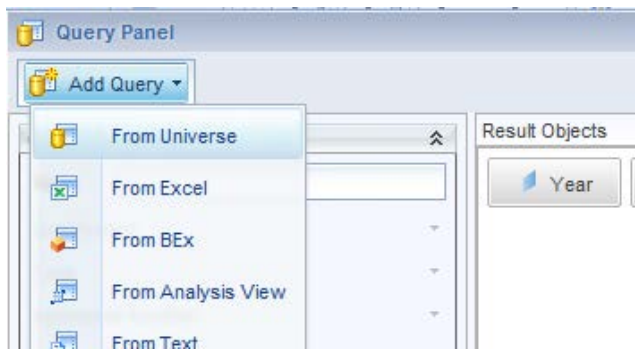
- Click **Run Query** to run your first query.

### Step 3: Create Second Query

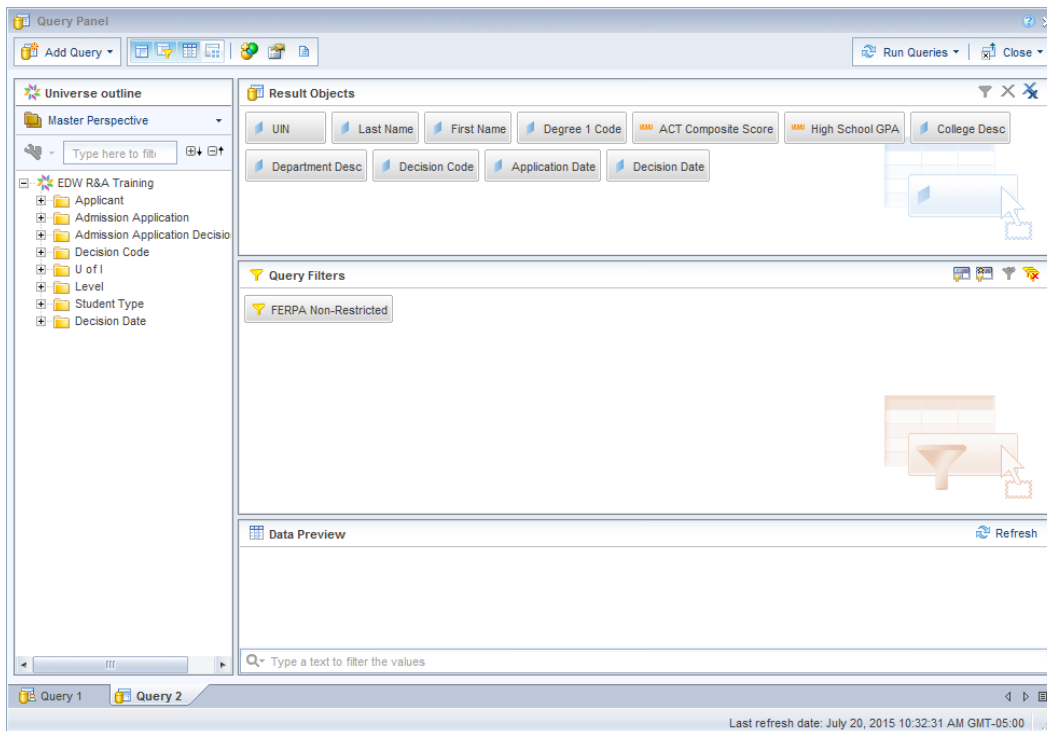
- From the report manager window, click the  **Edit Data Provider** button



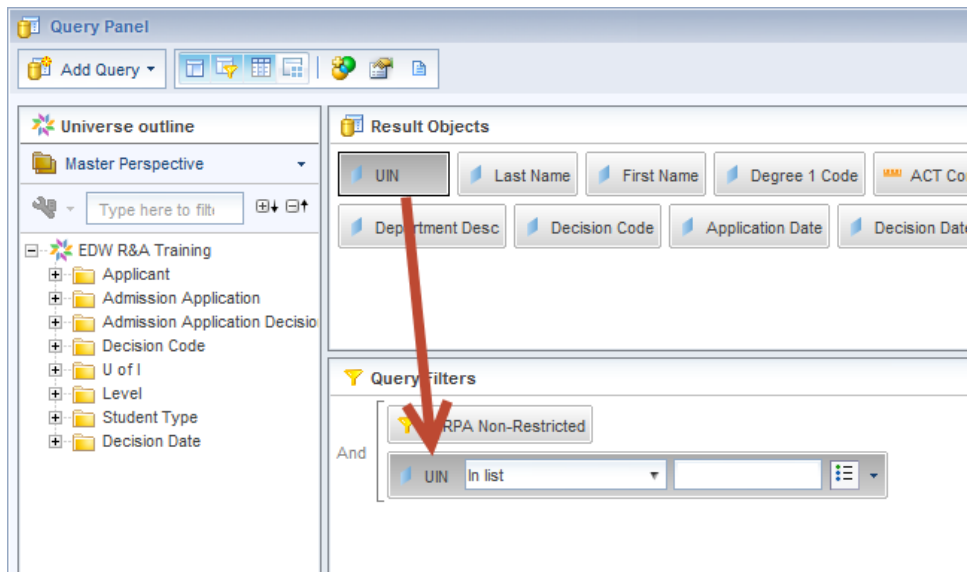
- From the Edit Query window, select the **Add Query** drop-down menu, then select **From Universe**




3. Select the Universe from the Universe window.
4. Add **Results Objects** and any **Query Filters** needed for this query



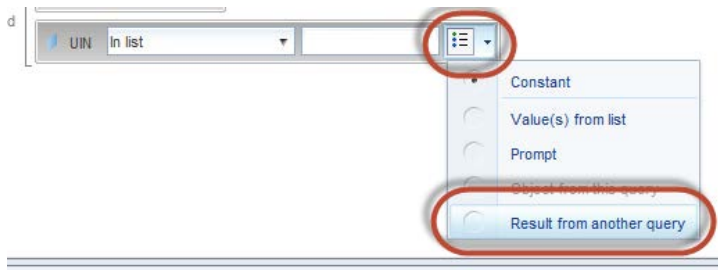
5. Drag the **UIN** object into the Query Filters panel



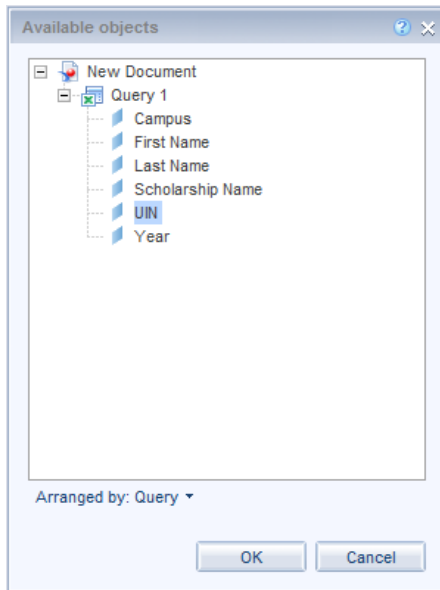
6. Leave the operator as the default **In List**.

7. Click the Operand Menu Button 

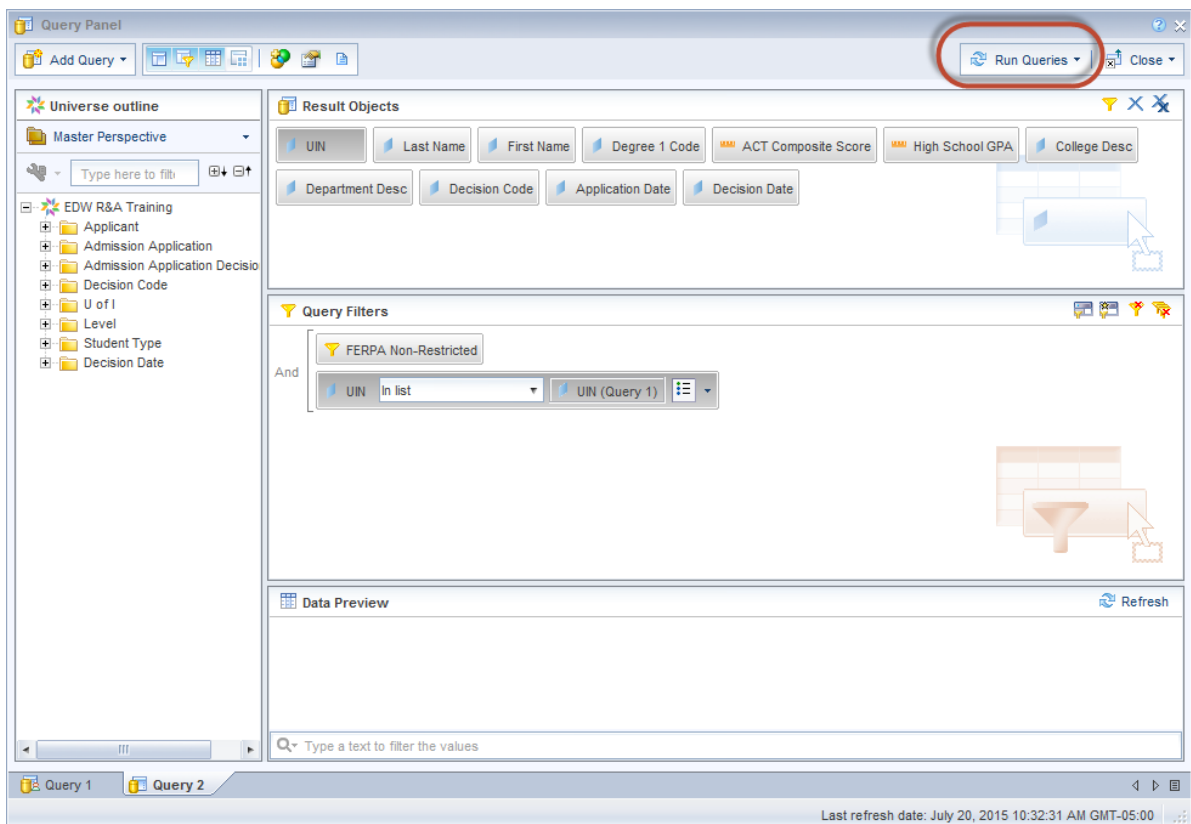
8. Select **Results from Another Query**



9. Select the **UIN** object from Query 1 (from STEP 1 above) and click **OK**



10. Click **Run Queries** button.



When your Report is generated, you will see two tables of data in your report. The first table is generated from the Excel query. The second table is generated from your second query from the universe:

Report 1

Table from Excel Query						Table from Universe Query			
Year	UIN	Last Name	First Name	Campus	Scholarship I	UIN	Last Name	First Name	Degree
2001	@00000199	Jordan	Gertrude	Chicago	ABC Scholars	@00000193	Aikman	Andrew	BS
2001	@00000201	Robinson	Ivan	Chicago	ABC Scholars	@00000193	Aikman	Andrew	BS
2001	@00000224	Selby	Zelda	Springfield	ABC Scholars	@00000193	Aikman	Andrew	BS
2001	@00000966	Gomez	Selena	Chicago	ABC Scholars	@00000193	Aikman	Andrew	BS
2001	@00000967	Allen	Karen	Urbana-Char	XYZ Scholars	@00000193	Aikman	Andrew	NONE
2001	@00000968	Davis	Sammy	Urbana-Char	XYZ Scholars	@00000195	Farve	Cynthia	BS
2002	@00000193	Aikman	Andrew	Chicago	PDQ Scholar	@00000195	Farve	Cynthia	BS
2002	@00000195	Farve	Cynthia	Chicago	PDQ Scholar	@00000199	Jordan	Gertrude	ADV
2002	@00000211	Arie	Carmi	Urbana-Char	XYZ Scholars	@00000199	Jordan	Gertrude	ADV
2002	@00000431	Thompson	Rover	Urbana-Char	XYZ Scholars	@00000199	Jordan	Gertrude	DDS
2002	@00000432	Wilson	Brian	Urbana-Char	XYZ Scholars	@00000201	Robinson	Ivan	BA
2002	@00000435	Green	Mark	Urbana-Char	XYZ Scholars	@00000201	Robinson	Ivan	BA
2002	@00000446	Ball	Lucille	Urbana-Char	XYZ Scholars	@00000201	Robinson	Ivan	BS
2002	@00000539	Brand	Kevin	Urbana-Char	XYZ Scholars	@00000201	Robinson	Ivan	BS
2002	@00000541	Chitwood	Joey	Urbana-Char	ABC Scholars	@00000211	Arie	Carmi	MS

*To Remove the Table from Excel Query:*

1. Click on the table border.

## Report 1

Year	UIN	Last Name	First Name
2001	@00000199	Jordan	Gertrude
2001	@00000201	Robinson	Ivan
2001	@00000224	Selby	Zelda

2. Click the **Delete** button on your keyboard.

Now only the data from your second query will be displayed.

*If you have more than 1000 rows in the excel spreadsheet:*

1. Divide up the excel list into individual worksheets with no more than 1000 rows in each sheet.
2. Add a query for each spreadsheet (following the above steps).
3. Repeat the steps in **Step 2** to create a filter on the UIN from each Excel query.
4. Nest the filters together (drag and drop one on top of the other)
5. Click the “and” operator to change to an “OR” operator.

