## **Introduction**

Filtering data is one of the most common techniques users rely on when examining report data. Applying a filter enables you to focus on any subset of data within a report. Data filtering in SAC is accomplished in one of three ways:

- Explicitly selecting data to be included in the display (inclusion).
- Explicitly excluding data from the display (exclusion).
- A combination of the two.

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## Inclusive and exclusive filter types

- An <u>inclusive filter</u> is one in which one or more values are specified. The result is a display of only those records that match the value or values specified.
- An <u>exclusive filter</u>, on the other hand results in selection of all records except those that match the value or values specified.

A filter can be applied in one of two ways:

- Via the Filter panel.
- By clicking directly on values to be filtered.

# Filter method: apply a filter via the Filter panel

A filter panel containing these elements is displayed:

Click on the **Filter** icon  $\boxed{1}$  in the toolbar.

- A. A count of active filters in the report.
- B. The *add filter* icon  $\boxed{\mathbb{M}}$ .

Click the *add filter* icon  $\boxed{1}$  to display a list of report Dimensions. The display contains three elements:

- C. The report name.
- D. A search line.
- E. A list of Dimensions.

Find the Dimension to be filtered by scrolling through the list or use the search line to narrow the list to those items containing whatever search string is entered (refer to Using Search to find a Dimension below).

Note that the list (E) shows <u>all</u> Dimensions in the report, including those that are not currently displayed. It's possible, in other words, to apply a filter to a Dimension that is not visible.



# Using Search to find a Dimension

Here's an example demonstrating how you might use the search line to restrict the list.<sup>1</sup> In this case, "fund" has been entered in Search and the resulting list displays only those Dimensions whose labels contain that text string.

# Filtering a non-date Dimension

Notice that some Dimensions (like **Funded Program Type** in the image on the right) have a ">" following the label. Others, like **Funded Program**, do not. The presence of the ">" indicates that this Dimension can be filtered "by Member" or "by Condition." If the angled bracket is absent, the Dimension can be filtered only "by Member."

## Filter by Member

This option is described in the Filter by Member section below.

## Filter by Condition

Filtering by condition enables the creation of filters that are <u>in relation to</u> values specified rather than by selecting specific values.

This can be explained via an example. In this case, the *Filter by Condition* option (A) has been selected for **Funded Program Type**.

<sup>1</sup> Using Search is not required. A Dimension can be found simply by scrolling through the	list.
Last updated 3/28/25	

Data Source	
Transaction Detail	Ø
fund 🛞	Q
Fund	Eunded Program
Fund Type	- and - rogium
Funded Program	
Funded Program Type	> Filter by Member
Funds Center	Filter by Condition.
Add Time Filters	a the second of

Data Source	
Transaction Detail	Ø
fund	<u>ه</u>
Fund	
Fund Type	
Funded Program	
Funded Program Type	>
Funds Center	

#### How to filter report data



## SAP Analytics Cloud Help

#### **SAP Analytics Cloud Help**

#### How to filter report data

A Set Conditions pop-up is displayed for this Dimension. The Condition is established by selecting from a list of relational operators (**B**) and specifying a value (**C**). For example, you might choose all values *Between* 00 and 06 or *Less Than* 50.

Note that more than one Condition can be specified, so a complex filter can be created.

		Set Conditions for Funded Program Type	4
Conditions			(
✓ Condit	ion 1		1
Include	Greater Than 🛽 🗸	Select a value	1
	Comparison		-
	Greater Than		1
Restriction	Greater Than or Equal To		
	Less Than or Equal To		_
	Less Than		1
	Between		1

## Filtering a date Dimension

When filtering a calendar date, the options presented are *Filter by Member* and *Filter by Range*. The former is described in the Filter by Member section below. Selecting *Filter by Range* provides the opportunity to apply a filter <u>relative</u> to a particular date. Here's an example of how you could filter **Posting Date**.

Set	Date Range for Pos	ting Date		
Type  Dynamic O Fixed				
2025				2026
Current Date				
System Date	$\sim$			
✓ Range 1 : 2025 - 2025				
Range Type 👩 Granularity 🌈	Look Back	Current Time Interv	al Look Ahead	
Standard V Year	~ 0	Year (2025)	0	
Include Range up to Current Time Interval		5		
+ Add a New Range				

After selecting *Filter by Range*, a pop-up like this is displayed.

Each of the numbered items in this image is described below.

#### Dynamic selection

- 1. Type
  - A. Dynamic Filtering: filters adjust automatically as the underlying data changes. This type of filter is useful when you need your analysis to reflect real-time data changes without manual updates.
  - B. Fixed Filtering: fixed filters, on the other hand, are based on a specific set of data at the time the filter is applied. This type of filter is useful when you need a consistent view of data over time, without it being affected by new data entries.

#### 2. Current Date

Choose System Date to specify time relative to today's date (the system date) or specify a date you choose via the drop-down. Here's an example of a custom date you might create:

Select Create Current Date Input Control

Current Date	
System Date	$\sim$
System Date	
+ Create Current Date Input Control	

In this case, granularity is by day (2) and the custom date has been set to Jan 1, 2025 (3). The name assigned to this custom date is "Start of the year" (1).

Current Date Input Control						
Name Start of the year						
Current Date Type	Granularity (i)	Date				
Custom Current Date / Time Interval	V Day 2	✓ Jan 1, 2025	3 🟥			

Here's the result when the **OK** button is pressed:

Set Date Range for Posting Date					
Туре					
Oynamic O Fixed					
2025				2026	
Current Date		Granularity	Date	1	
Start of the year	~	Day	Jan 1, 2025		
				J	
a hand a second a se	M .	a bu	and a sub-second state	and the second	

The date(s) you select using any of the other parameters will be relative to your custom "Start of the year" date.

#### 3. Range Type

When using a dynamic filter, the Range Type can be set to either Standard or Offset. These options allow you to tailor your data analysis to fixed periods or dynamically updating periods, depending on your needs. Here's the distinction between the two:

**Standard**: uses fixed start and end dates that do not change dynamically. For example, if you set a standard range from January 1, 2024, to December 31, 2024, the filter will always apply to this specific date range, regardless of the current date. This can be useful when you need to analyze data within a specific, unchanging period.

**Offset**: uses a relative time frame based on the specified Current Date. The start and end dates are defined by an offset from that date. For example, if you set an offset range of the last 3 months, the filter will always apply to the most recent 3 months prior to the Current Date. This Range Type is useful for creating dynamic, rolling time periods that automatically update as time progresses.

✓ Range 1 : Oct, 2024 - Jan, 2025						×	
	Range Type		Granularity	Look Back	Offset Time Interval	Look Ahead	
	Offset	$\sim$	Month 🗸	3	Month (Jan, 2025)	0	
Г	Offset Direction		Offset Granularity	Offset Amount			
L	Look Back	$\sim$	Year 🗸	0			

Notice that when Offset is selected, a new row showing Offset Direction is displayed. This could potentially be useful for adding a Look Ahead as well as a Look Back selection, e.g., three months back and two months ahead. However, because most of the data stored in the Business Warehouse indicates activities that occurred in the past (posting revenues or expenses, e.g.), this secondary specification may provide little or no value.

Note: Look Back or Look Ahead can also be used with the Standard Range Type.

Note, too, that the current period specified by Granularity will be included with the Look Back/Ahead on the timeline. In this case, the current month as well as the prior three months will be displayed.



#### 4. Granularity

The Granularity option enables you to specify the level of detail at which the filter should be applied. You can choose to filter data by year, quarter, month, or even day, depending on the data's structure and your analysis needs.

#### 5. Look Back/Ahead

Look Back and Look Ahead are used to define time-based filters that adjust dynamically based on the current (system) date or a custom date. These parameters help in creating dynamic, time-based views of your data that automatically update as time progresses, ensuring that your analysis remains relevant and up-to-date. An example is provided in the previous section describing **Range Type**.

### **Fixed selection**

Consider this example using **Fixed**. In this case, a granularity of Month is specified. The months to be included can be selected using the Date/Year drop-downs (**B**) or by repositioning the grab points (**A**) on the timeline.



#### SAP Analytics Cloud Help

## Filter by Member

*Filter by Member* can be selected explicitly, in cases where an option is available, as with **Funded Program Type**, or implicitly, by selecting a Dimension that doesn't present an option for filter type (i.e., no ">" is visible).

For example, suppose *Filter by Member* is selected for Funded Program Type (A).

Select one or more values from the resulting display (click the checkbox to select) and press the **OK** button (not shown) to activate the filter.

		Set Filters for Funded Program Type	
Sea	arch Q		Settings
Avai	lable Members		Member Selections
	ID	Description	
	All Members	All Members	
	00	General Fund	
	09	Designated General Funds	
	20	Endowment Principal	
	25	Sol dal	It a proper that the second

The next step is dependent upon whether you will create an inclusive or exclusive filter.



#### How to filter report data

## Apply an inclusive filter

If this is to be an <u>inclusive</u> filter, press the **OK** button to select all records that match the value(s) specified in the *Member Selections* panel.

## Apply an exclusive filter

To create an <u>exclusive</u> filter, click the **Settings** button in the *Member Selections* area.

		Set Filters for Funded Program Type		
Sea	arch Q		$\rightarrow$	Settings
Avai	lable Members		Member Selections	Ľ
	ID	Description		
	All Members	All Members		
	00	General Fund		
	09	Designated General Funds		
	20	Endowment Principal	4	
	25	ndourne of dakting and the second	and a property of the second	And the second

Then check the Exclude selected members checkbox.

	Settings
Member Display	
Available Members:	0
Default	$\sim$
Member Labels:	
ID & Description &	$\sim$
Member Selection	
Selection Mode:	0
 Dynamic Selection	$\sim$
Input Control Configuration	
Exclude selected members	
Selection Type:	
Multiple Selection	$\sim$

Click **OK** to activate the exclusive filter.

## View active filter(s)

Active filters applied via the Filter panel can be viewed using either of these methods:

1. If the panel is closed, the Filter icon in the Menu bar shows a count of active filters.



If the panel is open, a list of the filtered Dimensions and the type of filter is displayed. For example, here are the results you might see if either an inclusive or exclusive filter has been applied to Funded Program Type:

Inclusive filter appli	ed	Exclusive filter applied
Filters	×	Filters 🗙



In both cases we learned only that a filter was applied to **Funded Program Type**. To view the filter value(s) specified, consider this example shown in the image on the right. We see that filters have been applied to both **Funded Program** and **GL/Commitment Item**. To see which values were selected for **GL/Commitment Item**, click the **>**.

	Filters		×
~	Applied to All Pages (2)	(i)	$\overline{V}_{+}$
۲	Funded Program FUNDED_PROGRAM_NR		>
۲	GL/Commitment item	;	>

The list of filter values is displayed. In this case, three GL's were specified.

< @	GL/Commitment item	×
🗸 All		
🔽 FA	CULTY FULL TIME	
✓ FA	CULTY PART TIME	
V PC	OST DOC EXEMPT	

#### How to filter report data

## Remove filter(s) - all values

To remove <u>all</u> filter values for a Dimension:

- 1. In the Filter panel, hover your cursor over the Dimension to display an X.
- 2. Click the X that appears.

## Remove filter(s) - selected values

To remove only selected values (not all) from a Dimension:

- A. Click the > associated with that Dimension (as shown above)
- B. Click to uncheck whichever values will be removed.
- C. Select Apply Selections to save changes to the filter.



Filte	rs	*	Ø	×
~	Applied to All Pages (2)	(j)		₽,
۲	Fiscal Period/Year (All)		×	>
۲	GL/Commitment item (All)			>

CL/Commitment item	×
All	
B 🖸 FACULTY FULL TIME	
FACULTY PART TIME	
POST DOC EXEMPT	
and the state of the	-
Show Inactive Values	
C Apply Selections	

# Changing the display properties of a Dimension

To find a Dimension value you want to filter, it may sometimes be necessary to first change the display characteristics of that Dimension. Look at the values listed for **Funded Program** in the image on the right. Only the text description for each is shown. You might need to view the ID (the numeric portion of the Dimension) in order to find the account you seek. It's possible to change the Dimension's display properties to show the field by ID or description or both.

To add ID to **Funded Program** in this example:

- A. Click the Settings button.
- B. Click the drop-down to expose ID and Description.
- C. Select the **ID** checkbox in the *Member Labels* list.

		Set Filters for Funded Program	
Sea	arch C	k> Sett	tings
Avai	lable Members	Member Selections	Ľ
	Description		
	All Members	^	
	Bology Revoluted		
	Naya Research Acct		
	and a short		
184	and and	and the second sec	

Set Filters	for Funded Program
Search Q	Setting
Available Members	Member Display
Description	
All Marthers	Available Members:
Bology Revoluted	Default 🗸
Nage Research Acct	Member Labels:
TEMPLER SU Arbeits	Description @
HENDRAME STU-ANDR	Description (&
BIOLDEY MEDIA CENTER	
BLECTRON MICROSCOPE	Description
MMS RECEIPT	
CAS Talker Start Up	Selection Mode:
I wanter and a second and a second	لاجريبية المعورين مستعاسات المستعاني المواري

The Settings button is available only when applying a filter using the Filter panel.

It's now possible to select **Funded Program** by account number. Once items have been selected, press **OK** (not shown) to activate the filter.

		Set Filters for Funded Progra	m		
Se	arch Q				Settin
Ava	ilable Members			Member Display	
	ID	Description			
	All Members	All Marribers	÷.	Available Members:	0
	TRBU/909000058	Bology Rechtlich		Default	$\sim$
	TRBU/909000067	Nage Research Acct		Member Labels:	
	TRBU/909000070	TEMPLER SIL Arbeits		Description 6	1000
	TRBU/909000072	PRODUCES DOLLARD		(C) Description (C)	~
	TRBU/9090010591	BOLDO WEDA CENTER		ID ID	
	TRBU/9090010593	ELECTRON INCROSCOPE		Description	
	IRBU/9090010594	many many first and service			

## Filter method: apply a filter directly via right-click

Once you run a report, you can apply a filter to a <u>single value</u> of a Dimension by right-clicking on that value. For example, right-click on **GL/Commitment Item** 511900.

Important! Right click on the value, not the column header.

Measure	s >	FY 2014 Budget Per.	01-04	>
GL/Commitment item				
420030 RECEIPTS AND CREDITS			-	
537100 OTHER EXP RECVRY			-	
500230 Overbase Comp Prof			-	
511900 POST & MAIL SVC 500210 Prof Staff FT	8	Filter Member	5	
513000 REPRDCTN & PRTG	Y	Filter B	-	
510010 SUPPLIES	×	Exclude Member 🤤	-	
579999 TRSF OUT OPERATING	fx	Add client calculation	> >	
500249 Uncomm Sal, Prof St	20	Hide row	c	
Totals		Table Functions	0	
479999 TRANSFER IN - OPERAT	-	Table Functions	Guerr	

Three filter options are displayed:

**Filter Member (A)**: results in all instances of this Dimension being selected throughout the report.

**Filter (B)**: the filter is applied based on the value selected plus any values in columns to the left of the one selected. In other words, the filter specified is a combination of values including the one selected.

Exclude Member (C): short-cut method of excluding a value in a list.

Note: if you exclude one value and then attempt to exclude a second value, the first one will reappear because the filter is being <u>replaced</u> rather than <u>appended</u>.

	Aeasures	>	FY 2014 Budget Per.	01-0	4 >
GL/Commitment item					
420030 RECEIPTS AND C	REDITS				-
537100 OTHER EXP RECV	/RY				-
500230 Overbase Comp P	rof				-
511900 POST & MAIL SVC			Filter Mamber		-
500210 Prof Staff FT		ν	Filler Member		C
513000 REPRDCTN & PR	rg 🐂	8	Filter B		-
510010 SUPPLIES		×	Exclude Member		_
579999 TRSF OUT OPERA	TING	fx	Add client calculation	>	0
500249 Uncomm Sal, Prot	St	2	Hide row		c
Totals			Table Functions		0
479999 TRANSFER IN - O	PERAT				o

## Example of filtering via Filter Member

In this case, the GL **CNTR SRVC** is selected by rightclicking on it. *Filter Member* is then selected.

The result shows all instances of this GL throughout the report.

[	500250 Admin Supp St 515511 CNTR SRVC - C 515560 CNTR SVCS-F6	COMPUTER	07/07/2023 07/14/2023 07/21/2023 09/22/2023 07/01/2023 Filter Member		
[	515511 CNTR SRVC - C		07/14/2023 07/21/2023 09/22/2023 07/01/2023 Filter Member		
[	515511 CNTR SRVC - 0		07/21/2023 09/22/2023 07/01/2023 Filter Member		
[	515511 CNTR SRVC - C 515560 CNTR SVCS-F4		09/22/2023 07/01/2023 Filter Member		
[	515511 CNTR SRVC - C		07/01/2023 Filter Member		
	515560 CNTR SVCS-FA	8	Filter Member		
	515560 CNTR SVCS-FA				
			Filter	Filter Member	1000
		×	Exclude Memb	er en	a
and and a				ulation >	-
	- added - Antonial				
Commitmo	nt itam	Posting D	into Toxt		D
Commune		Posting D			-
DOTE CIVITE 3	RVC - COMPUTER	07/01/202	3	A CONTRACTOR OF CONTRACTOR	
					No
5511 CNTR 9	RVC - COMPUTER	07/01/202	3	And the second second second	Not
5511 CNTR 5	RVC - COMPUTER	08/18/202	3	spolic bries recent	N
		08/21/202	3	Chapter Sci Print Ca	N
		08/28/202	3	Comparison of the Company's Company's Company's Company's Company's Company's Company's Company's Company's Com	Inv
511 CNTR S	RVC - COMPUTER	07/01/202	3	Page 1010001, 2000	1
		07/06/202	3	Part State of Long	Inv
5511 CNTR 9	RVC - COMPUTER	07/10/202	3	Automatical Automatical Property and	N
			Same of	and an a loss in the second second	6
		07/24/202	3	summer families of the local division of the	No
		08/21/202	3	and some lower, the survey of the	Inv
	Commitme i511 CNTR S i511 CNTR S i511 CNTR S i511 CNTR S i511 CNTR S	Commitment item i511 CNTR SRVC - COMPUTER i511 CNTR SRVC - COMPUTER i511 CNTR SRVC - COMPUTER i511 CNTR SRVC - COMPUTER i511 CNTR SRVC - COMPUTER	Commitment item         Posting D           i511 CNTR SRVC - COMPUTER         07/01/202           i511 CNTR SRVC - COMPUTER         07/01/202           i511 CNTR SRVC - COMPUTER         08/18/202           i511 CNTR SRVC - COMPUTER         08/18/202           i511 CNTR SRVC - COMPUTER         08/18/202           i511 CNTR SRVC - COMPUTER         07/01/202           i511 CNTR SRVC - COMPUTER         07/01/202	Commitment item         Posting Date         Text           i511 CNTR SRVC - COMPUTER         07/01/2023         08/18/2023           i511 CNTR SRVC - COMPUTER         08/18/2023         08/18/2023           i511 CNTR SRVC - COMPUTER         08/18/2023         08/18/2023           i511 CNTR SRVC - COMPUTER         07/01/2023         08/28/2023           i511 CNTR SRVC - COMPUTER         07/01/2023         07/01/2023           i511 CNTR SRVC - COMPUTER         07/01/2023         07/01/2023	Excluse Memoer           Commitment item         Posting Date         Text           i511 CNTR SRVC - COMPUTER         07/01/2023         07/01/2023           i511 CNTR SRVC - COMPUTER         07/01/2023         08/18/2023           i511 CNTR SRVC - COMPUTER         08/18/2023         08/22/2023           i511 CNTR SRVC - COMPUTER         07/01/2023         07/01/2023           i511 CNTR SRVC - COMPUTER         07/01/2023         07/01/2023

## Example of filtering via Filter

As previously mentioned, the filter is applied based on the value selected plus any values in columns to the left of the one selected. Consider these different results if you right-click separately on each of the numbered values and select *Filter*:



	Records Selected					
Right -	Funds	Funded	GL	Posting Date		
click	Center	Program				
Scenario						
1	One Funds	One Funded	One GL	All dates		
	Center (FC)	Program (FP)		associated with GL		
2	One FC	One FP	All GLs	All dates		
			associated with	associated with FP		
			FP			
3	One FC	All FPs	All GL's	All dates		
		associated	associated with	associated with FC		
		with FC	FC			

## Example of applying an exclusive filter

To remove all instances of *Payroll Posting* from the **Document Type** column, right-click on any one of the rows containing this value and select *Exclude Member*.

The result: all values for **Document Type** except the excluded value are visible.

## View active filter(s)

To view filters applied via the right-click method:

1. Click the ellipsis (three dots) in the upper right corner of the analysis grid. Note: it may be necessary to click a cell in the analysis area to display the ellipsis.

Funds Center	Funded Program	GL/Commitment item	Posting Date	Text	Document type	R.	SC / PR #	Do
processing the last	con measure	500250 Admin Supp Staff FT	07/07/2023	W1-27-2023-20230707	Payroll Posting	1		
	analyzed a	500250 Admin Supp Staff FT	07/07/2023	W1-27-2023-20230707	Payroll Posting	4	8-	
	0000012000	500250 Admin Supp Staff FT	07/07/2023	W1-27-2023-20230707	Payroll Posting	2	ч.,	
	Management of	500250 Admin Supp Staff FT	07/07/2023	W1-27-2023-20230707	Payroll Posting	22	4-	
	100000-0100	500250 Admin Supp Staff FT	07/07/2023	W1-27-2023-20230707	Payroll Posting	22		8
	FUNDED_PROGRAM_NR	500250 Admin Supp Staff FT	07/07/2023	W1-27-2023-20230707	Payroll Posting	24	<i>H</i> -	
						22	8-	(e)
						22	4-	
						1	- H -	14

BOSTON UNIVERSITY Variable Screen I Filter () 2.6			2		Export Data	
Funds Center	Funded Program	GL/Commig	Document type	FI doc.number	FSR/ISR Number	Ve
	-	500250 Adr	Payroll Pr	r Member	-	
		- 5	Payroll P	f		
		1	Payroll P	Payroll P X Exclude Member		•
		- 5	Payroll P /x Add	client calculation	DN >	sber
		- 21	Payroll Pi Payroll Pi R Hide	e row		
		- S -	Payroll P III Tab	e Functions	>	

## Remove filter(s)

- 1. Follow instructions for *View active filter(s)* above.
- 2. Click the **X** adjacent to any of the listed Dimensions to remove one or all of them.

