

## 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

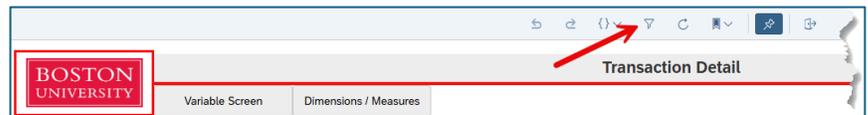
- An inclusive filter is one in which one or more values are specified. The result is a display of only those records that match the value or values specified.
- An exclusive filter, on the other hand results in selection of all records except those that match the value or values specified.

A filter can be applied in one of two ways:

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

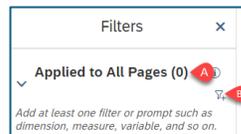
## Filter method: apply a filter via the Filter panel

Click on the **Filter** icon  in the toolbar.



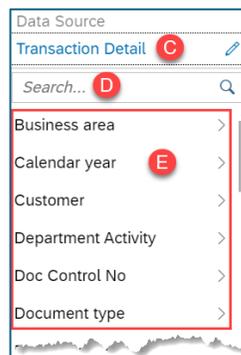
A filter panel containing these elements is displayed:

- A count of active filters in the report.
- The *add filter* icon .



Click the *add filter* icon  to display a list of report Dimensions. The display contains three elements:

- The report name.
- A search line.
- A list of Dimensions.

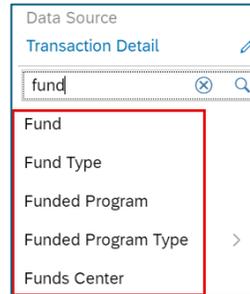


Find the Dimension to be filtered by scrolling through the list or use the search line to narrow the list to those items containing whatever search string is entered (refer to Using Search to find a Dimension below).

 Note that the list (E) shows all 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.

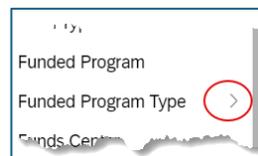
## Using Search to find a Dimension

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."



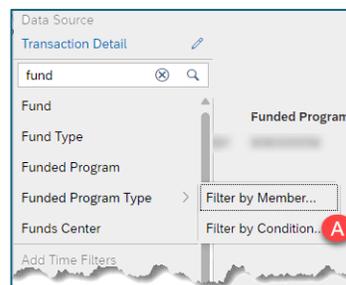
## Filter by Member

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

## Filter by Condition

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

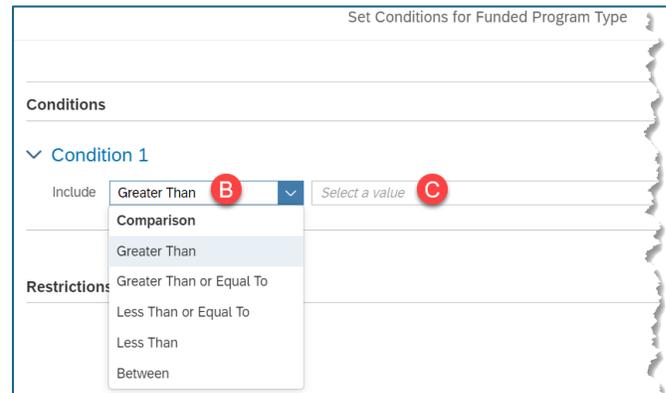
This can be explained via an example. In this case, the *Filter by Condition* option (A) has been selected for **Funded Program Type**.



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

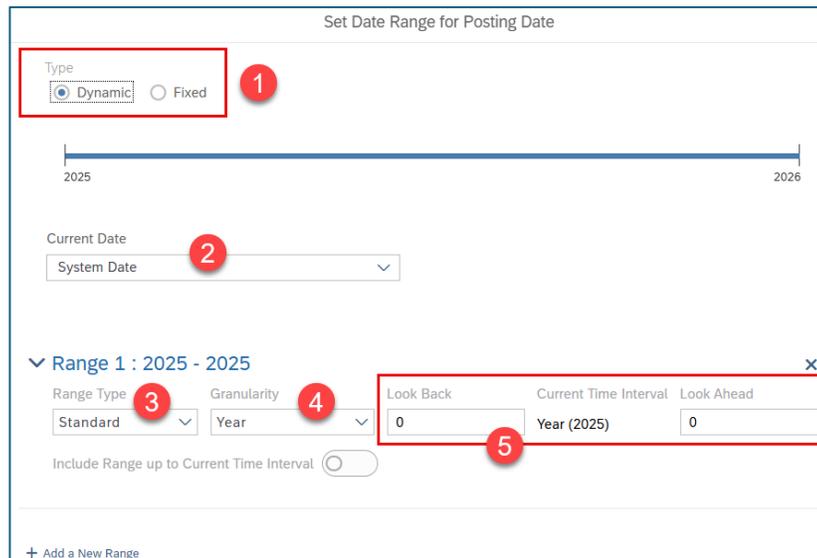
A *Set Conditions* pop-up is displayed for this Dimension. The Condition is established by selecting from a list of relational operators (B) and specifying a value (C). For example, you might choose all values *Between* 00 and 06 or *Less Than* 50.

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



## 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 relative to a particular date. Here's an example of how you could filter **Posting Date**.



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*

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).

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

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.

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.

Set Date Range for Posting Date

Type  
 Dynamic  Fixed

2024 2025 2026

Current Date  
System Date

∨ Range 1 : Oct, 2024 - Jan, 2025 ×

Range Type Granularity Look Back Current Time Interval Look Ahead  
Standard Month 3 Month (Jan, 2025) 0

#### 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.

Set Date Range for Posting Date

Type  
 Dynamic  Fixed

**A** 2014 2015 **A**

▼ Range 1 : Jan, 2014 - Dec, 2014 ×

Granularity  
Month

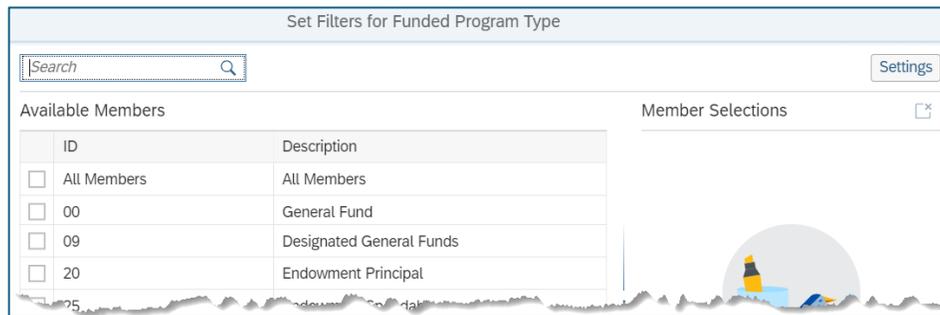
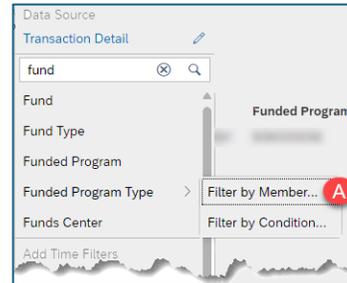
**B** 2014 Jan **B** 2014 Dec

## 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.



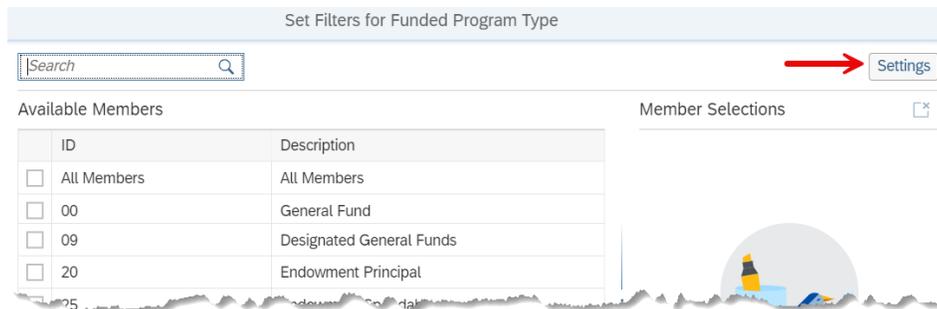
**i** The next step is dependent upon whether you will create an inclusive or exclusive filter.

## Apply an inclusive filter

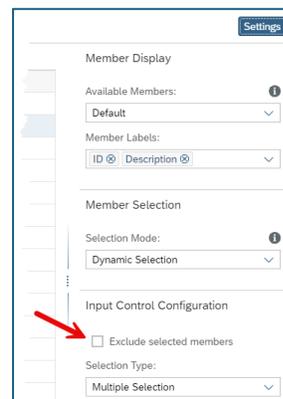
If this is to be an inclusive filter, press the **OK** button to select all records that match the value(s) specified in the *Member Selections* panel.

## Apply an exclusive filter

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



Then check the *Exclude selected members* checkbox.



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

## View active filter(s)

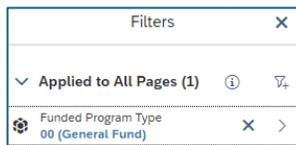
Active filters applied via the Filter panel can be viewed using either of these methods:

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

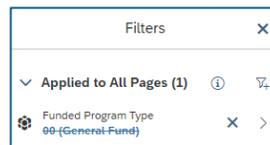


2. If the panel is open, a list of the filtered Dimensions and the type of filter is displayed. For example, here are the results you might see if either an inclusive or exclusive filter has been applied to **Funded Program Type**:

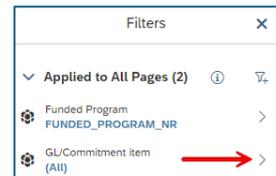
Inclusive filter applied



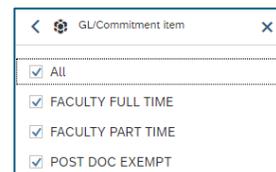
Exclusive filter applied



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 >.



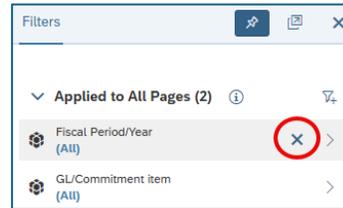
The list of filter values is displayed. In this case, three GL's were specified.



## Remove filter(s) – all values

To remove all filter values for a Dimension:

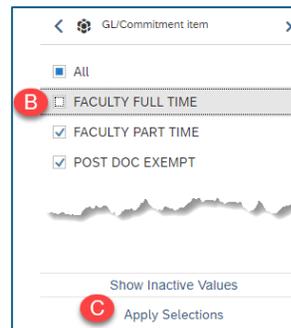
1. In the Filter panel, hover your cursor over the Dimension to display an **X**.
2. Click the **X** that appears.



## Remove filter(s) – selected values

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

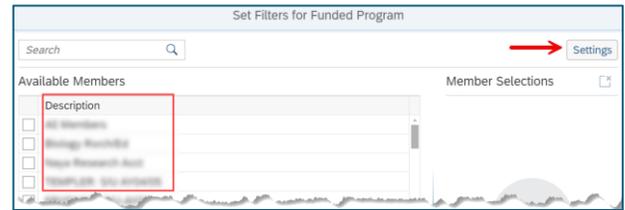
- A. Click the > associated with that Dimension (as shown above)
- B. Click to uncheck whichever values will be removed.
- C. Select *Apply Selections* to save changes to the filter.



**i** Remember to click Apply Selection!

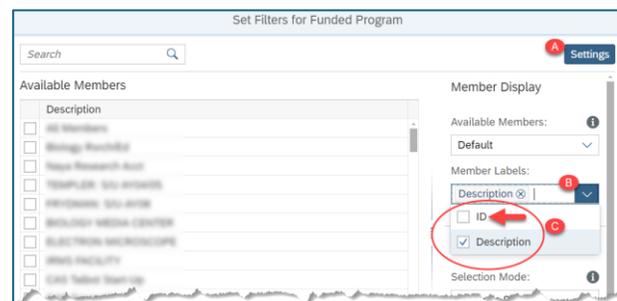
## Changing the display properties of a Dimension

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.



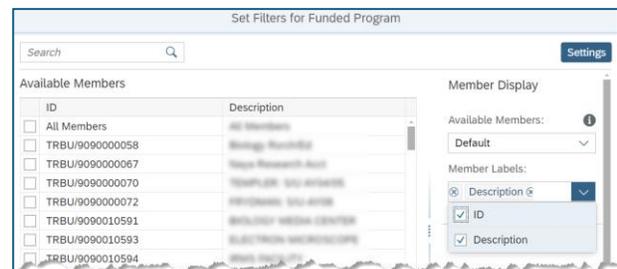
To add ID to **Funded Program** in this example:

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



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

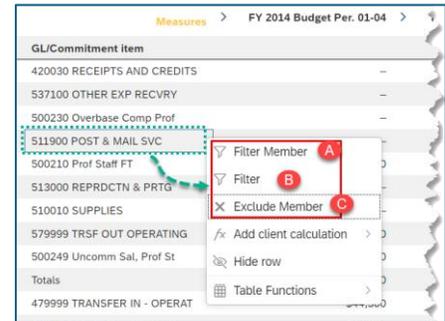
It's now possible to select **Funded Program** by account number. Once items have been selected, press **OK** (not shown) to activate the filter.



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

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

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

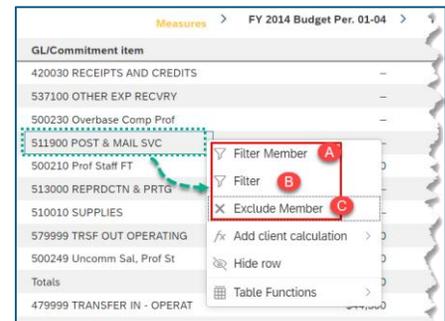


Three filter options are displayed:

**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.



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

### Example of filtering via Filter Member

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

Funds Center	Funded Program	GL/Commitment item	Posting Date	Text
		500250 Admin Supp Staff FT	07/07/2023	
			07/14/2023	
			07/21/2023	
			08/22/2023	
		515511 CNTR SRVC - COMPUTER	07/01/2023	
		515560 CNTR SVCS-FAC MNCT		

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

Funded Program	GL/Commitment item	Posting Date	Text
	515511 CNTR SRVC - COMPUTER	07/01/2023	
	515511 CNTR SRVC - COMPUTER	07/01/2023	
	515511 CNTR SRVC - COMPUTER	08/18/2023	
		08/21/2023	
		08/28/2023	
	515511 CNTR SRVC - COMPUTER	07/01/2023	
		07/06/2023	
FUNDED_PROGRAM_NR	515511 CNTR SRVC - COMPUTER	07/10/2023	
		07/24/2023	
		08/21/2023	

## Example of filtering via Filter

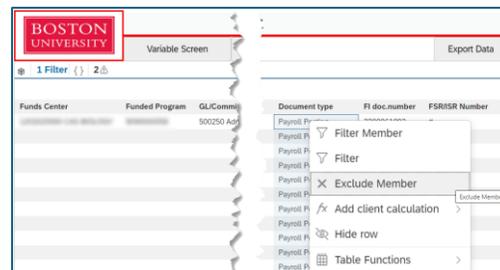
As previously mentioned, the filter is applied based on the value selected plus any values in columns to the left of the one selected. Consider these different results if you right-click separately on each of the numbered values and select *Filter*:

Funds Center	Funded Program	GL/Commitment item	Posting Date
3	2	1	07/07/2023
			07/14/2023
			07/21/2023
			09/22/2023
		515511 CNTR SRVC - COMPUTER	07/01/2023

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

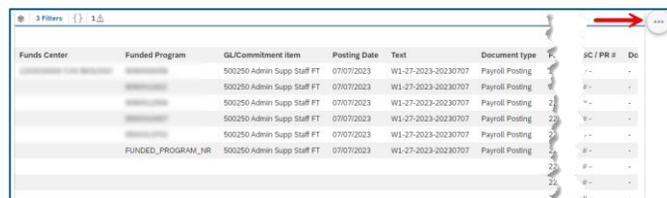


The result: all values for **Document Type** except the excluded value are visible.

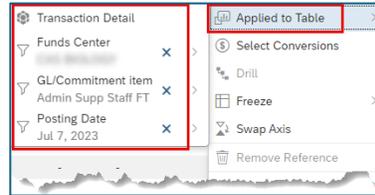
## View active filter(s)

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.



2. Hover over *Applied to Table* to view all filtered Dimensions.



## 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.

