

Introduction

Process and Trigger

Setting a filter in a Business Warehouse (BW) report allows a user to focus on a subset of the data returned in the initial report display. Report filters can be applied or removed in several ways. This document describes multiple methods commonly used for each.

Prerequisites

None

Menu Path

None

Transaction

None

Tips and Tricks

- Instructions calling for a mouse right-click can be executed on a Macintosh computer with a onebutton mouse by holding down the CTRL key while clicking.
- Data can be filtered by *including* specified values, *excluding* values, or a combination of both.

Reports

None



Procedure

Data filtering in BW is accomplished by explicitly selecting data to be included in the display (inclusion), explicitly excluding data from the display (exclusion), or some combination of the two. Inclusion is the default action when creating a filter. However, toggling from inclusion to exclusion is a simple process, as <u>Example 2</u> demonstrates.

Example of inclusion	Example of exclusion
The report will be filtered to show only Commitment Items 500010 and 500020. include icon ■ indicates that the filter wil only entries <i>equal</i> to the specified values	The report will be filtered to show all Commitment Items except 500010 and 500020. The exclude icon indicates that the filter will select only entries <i>not</i> <i>equal</i> to the specified values.
Selections	Selections
🗌 Select All 📒 📕	🗌 Select All 🔟 📒
Type Description	Type Description
500010 FACULTY FULL TIME	500010 FACULTY FULL TIME
500020 FACULTY PART TIME	500020 FACULTY PART TIME

The following examples demonstrate multiple methods of filtering report data. In the examples, the filter object is **Commitment Item** in a Funds Management report. However, these methods can be applied to any characteristic in a BW report.

Click on the link below to navigate to the desired step in the Work Instruction.

Step Name	Description
Example 1: filter by column	Filter data in a column by operating on the column header.
	Remove filter by operating on the column header.
Example 2: filter by exclusion	Filter data by excluding specific values.
	Remove filter via technique described in Example 1 or 3.
Example 3: filter using the Filter panel	Filter data in a column using the Filter button.
	Remove filter via the Filter button.
Example 4: filter a single value using direct selection	Filter data in a column by clicking directly on a particular item.
	Remove filter via technique described in Example 1 or 3.
Example 5: filter a single value by dragging it out of a column	Filter data in a column by clicking on an item and dragging it out of the report.
	Remove filter via technique described in Example 1 or 3.



Example 1: filter by column

Business case: we want to filter report data to show only Commitment Items related to supplies.

Commitment	itom		
401220	Back	*	
401220	Filter		Select Filter Value
410010	Change Drilldown		Remove Filter Valu
479999	Hierarchy		Variable Screen
499999	Broadcast and Export	=	ERATING
500010	Save View		
500020	Personalize Web Application		
500050	Properties		INSTRUCTION AND RESE
500070	Calculations and Translations	-	INSTRUCTION AND RESE
500100	Documents	÷	
500210	۰ III ۲		

- 1. Right-click on **Commitment Item** column header to display the context menu.
- 2. Release the mouse button and slide the cursor down to **Filter**.
- 3. Click on **Select Filter Value** to open a selection window.
- 4. In the window that appears, select one or more Commitment Items to be filtered by clicking on each item. In the example below, three Supplies Commitment Items are selected.

11				Selection	5
laximum Records: 1000 Refresh				Select A	JI 🔲 📕
Select All			_	Туре	Description
Commitment item: Key (Partially Compounded)	Commitment item: Long Text± [†]	Commit.item cat.: Key± [†]			
8					
500735	HONORARIA	3			
500740	HONORARIA - US CITIZEN	3			
509004	EMPLOYEE REIMBURSEMENT	3			
510010	SUPPLIES	3			
510020	CONSUMABLE SUPPLIES - COFFEE/WATER SERVI	3	Add 🕨		
510030	CONSUMABLE SUPPLIES - OFFICE	3	Remove		
510040	CONSUMABLE SUPPLIES - RESEARCH LABORATOR	3			
510100	NON-CAPITAL/MINOR EQUIPMENT	3			
511200	FOOD EXPENSE	3			
511500	TELECOM EQUIPMENT & USAGE - LANDLINE	3			
511510	TELECOM EQUIPMENT & USAGE - MOBILE DEVIC	3			
511800	EQUIPMENT RENTAL/LEASE	3	X		
) [- -) Id)I			
ter a value for:					

Select one or more items by clicking the gray button to the left of the item (click the button again to de-select an item). Alternatively, use the **Select All** check box to select all items displayed in list.

- 5. Click the **Add** button to copy the highlighted items to the Selections column.
- 6. Click the **OK** button to activate the filter.



Result: the report displays only selected items:

		Recurring FY - 2012≟ [†] Budget	Non-Recurring FY - 2012 ± [†] Budget	Current FY - 2012≟ [†] Budget	Actual - Period ≞ [†] 006/2012	A* 01	ied ≞ [⊤]
Commitment item \mathbb{I}^{\forall}					s		s
510020	CONSUMABLE SUPPLIES - COFFEE/WATER SERVI					1	8.79)
510030	CONSUMABLE SUPPLIES - OFFICE						3.61)
510040	CONSUMABLE SUPPLIES - RESEARCH LABORATOR				5,856.20	•	3.71)
Result					5,856.20		8.11)

Remove filter value via column method

Commitment	Bark	Þ	
510020	Filter	Þ	Select Filter Value
510030	Change Drilldown	Þ	Remove Filter Value
510040	Hierarchy	۲	Variable Screen
Result	Broadcast and Export	۲	
	Save View		
	Personalize Web Application	۲	
	Properties	•	
	Documents	•	
	Sort Commitment item	۲	

- 1. Right-click on Commitment Item column header to display the context menu
- 2. Release the mouse button and slide the cursor down to **Filter**.
- 3. Click on Remove Filter Value.

Example 2: filter by exlusion

Business case: we want to filter report data to show all Commitment Items *except* consumable supplies.

	Sele	ection	s
	∨ Se	elect A	
		Туре	Description
		=	510020 CONS SUPPL-CFF/WTR
ley⊾∓		-	510030 CONS SUPPL-OFFICE
		=	510040 CONS SUPPL-RES LAB
Add P			
Remove			
		<u>.</u>	manul

- 1. Follow instruction steps 1-5 in Example 1.
- 2. Click the **Select All** check box in the Selections column to select the items to be excluded.
- 3. Click the red Exclude button.





- 4. The exclusion icon \blacksquare indicates that the filter will be set to select all Commitment Items not equal to 510020, 510030, or 510040.
- 5. Click the **OK** button to activate the filter.

Example 3: filter using the Filter panel

Unrestricted Budget to Actual - year to date								
Variable Screen Open Save As Unever A Table Info Print Version Export to Microsoft Excel Export to PDF Filter Settings								
 Columns Budget and Actual structure 								
 Rows 								
 Funds Center 	Funds Center 17	Funded Program =	Commitment item #					

1. Click the Filter button to display the Filter Panel, which contains all report characteristics and their current filter settings.

		Unrestricted Budget to Actual - year to date										
	[Variable Screen 0	pen Save As	Draptay As Table	•	Info	Print Version Export	to Microso	oft Excel Export to PDF F	ilter Sett	ings	
ſ		To adjust filter area,	drag characteri	stics from navigatio	n area into filter a	rea						
		Amount type:	Show All Value	5 💌	Authorization gro	up: [Show All Values 💌		Budget and Actual structure:	Show All	Values	•
		Budgeting Process:	Show All Value	5 🔻	Chart of account	ts: [0010 Trustees of Bos	•	Cmmts/actuals trans.:	Show All	Values	
		Commitment item:	Show All Value	s 🔻	Commt/Actual D)etail: [Show All Values 💌		Company code:	TRBU Tr	ustees of Bos 💌	
lter		Fiscal Period/Year:	Show All Value	s 🔻	Fiscal year:	[Show All Values 💌		Fiscal Year Variant:	V6 .		
		FM area:	Trustees of B	oston U 💌	Functional area:	[Show All Values 💌		Fund:	Show All	Values 💌	
		Funded Program:	Show All Value	5 🔻	Funded Program	Тур: [Show All Values 💌		Funds Center:	1202020	000 CAS BIOLO	
		Grant:	Show All Value	5 🔻	Int Budg Process	s: [Show All Values 💌		Stat. key figures:	Show All	Values	
		Value type in FM:	Show All Value	5 🔻								
l		Close Display All	Filter Values									
		Columns										
		 Budget and Ac 	tual structure									
		▼ Rows										
		 Funds Center 		Funds Center 47	Fun	ded Pro	gram Ŧ		Commitment its	em⊥ ^y		

The Filter Panel shows the filter status of all characteristics in a report. "Show All Values" indicates that a characteristic is not being filtered. Anything other than "Show All Values" indicates the characteristic is being filtered. In the example above, Commitment Item is unfiltered. Funds Center, on the other hand, is being filtered to show a specific department.

Unrestricted Budget to Actual - year to date							
Variable Screen Open Save As Display As Tat							
To adjust filter area, drag characteristics from navigatio							
Amount type:	Show All Values 💌						
Budgeting Process:	Show All Values 💌						
Commitment item:	Show All Values 💌						
Fiscal Period/Year:	Show All Values						
FM area:	Edit						
Funded Program:	Show All Values						

- 1. To filter, click the drop-down button to the right of **Commitment Item**. Slide the cursor down and click on **Edit**.
- 2. In the window that appears (example below), click on one or more **Commitment Items** to select them for filtering.

		•						
AII -						Selections	;	
Max	imum Records: 1000 Refresh					Select A	I 🔲 📕	
S	elect All					Type	Description	
	Commitment item: Key (Partially Compounded)	Commitment item: Long Text = "	Commit.item cat.: Key ±*					
7		-						
	401220	LABORATORY FEE	2					
	410010	GIFT REVENUE	2					
	479999	TRANSFER IN - OPERATING	2					
	499999	TRANSFER IN - NON OPERATING	2					
	500010	FACULTY FULL TIME	3		Add 🕨			
	500020	FACULTY PART TIME	3		Remove			
	500050	EXTRA COMPENSATION INSTRUCTION AND RESEA	3					
	500070	EXTRA COMPENSATION INSTRUCTION AND RESEA	3					
	500100	POST DOC EXEMPT	3					
	500210	EXEMPT FULL TIME	3					
	500220	EXEMPT PART TIME	3	-				
	500230	EXTRA COMPENSATION EXEMPT - OVERBASE	3					
•								

- Click the Add button to copy the selected items to the Selections column.
- 4. Click the **OK** button to activate the filter.

Unrestricted Budget to Actual - year to date								
Variable Screen Open Save As Display As Table								
To adjust filter area, drag characteristics from navigation area into								
Amount type:	Show All Values 💌	Author						
Budgeting Process:	Show All Values 💌	Chart						
Commitment item:	500010 FACULTY FULL 💌	Commt/A						
Fiscal Period/Year:	Show All Values 💌	Fiscal						
FM area:	Trustees of Boston U 💌	Function						
Funded Program:	Show All Values 💌	Fund						
Grant:	Show All Values 💌	Int Budg						
Value type in FM:	Show All Values 💌							
Close Display All Filter Values								

Result: Filter Panel shows selected filter values now in effect.

5. Click the **Close** button to hide the filter panel when filter selection is complete.

Remove filter value via the filter panel



- 1. Display the filter panel (click the **Filter** button if panel is not visible).
- 2. Click the drop-down button to the right of the item for which the filter is to be removed.
- 3. Select Clear.
- 4. Click the **Close** button to hide the filter panel when filter selection is complete.



Example 4: filter a single value using direct selection

Commitment item≞ [∓]			:	S S	
510020	CONSUMABLE SUPPLIES - COFFI	EE/WATER SERVI			
510030	CONSUMABLE SUPPLIES - OFFIC	NF Back	•		
510040	CONSUMABLE SUPPLIES - RESE	Goto	•		
500010	FACULTY FULL TIME	Filter	÷	Keep Filter Value	
500020	FACULTY PART TIME	Change Drilldown	÷	Keep Filter Value or	Axis
500210	EXEMPT FULL TIME	Hierarchy	•	Filter and Drill Down	By
500220	EXEMPT PART TIME	Broadcast and Exp	ort 🕨	Select Filter Value	
Result		Save View Personalize Web A	pplication •	Remove Filter Value Variable Screen	
		Properties	•		
		Calculations and Tr	anslations 🕨		
		Documents	•		
		Sort Commitment ite	em 🕨 🕨		

- 1. Right-click directly on item to be filtered to display the context menu. In this example, *Consumable Supplies – Office*, was selected
- 2. Release the mouse button and slide the cursor down to Filter.
- 3. Click Keep Filter Value on Axis.

W Keep Filter Value on Axis filters on the selected value while keeping the item visible in the report. By contrast, Keep Filter Value filters on the selected value but the item is not displayed.

Removing a filter set using direct selection

Commitment item≟ [∓] 510030 CONSUMABLE SUPP		•		1.	Right click on the filtered item to
Result	Goto				display the context menu.
	Filter Change Drilldown	•	Keep Filter Value Keep Filter Value on Axis	2.	Release the mouse button and slide the cursor down to Filter .
	Hierarchy Broadcast and Export Save View Personalize Web Application		Filter and Drill Down By ► Select Filter Value Remove Filter Value	3.	Click Remove Filter Value.
	Properties Calculations and Translations Documents Sort Commitment item	* * * *			

Example 5: filter a single value by dragging it out of a column

This method involves excluding items by dragging them out of the report.

Business case: remove "Faculty Other" from the list of **Commitment Items** related to faculty salary in the example below.



		Recurring FY - 2012≟ [≑] Budget	Non-Recurring FY - 2012 ≞ [≆] Budget	Current FY - 2012≞∛ Budget
Commitment item $\mathbb{A}^{\mathbb{T}}$		S		S
500010	FACULTY FULL TIME	58,786.00		58,786.00
500020	FACULTY PART TIME	0.00		0.00
500030	FACULTY OTHER	79,467.00		79,467.00
Result		138 253 00		138 253 00

- Position the cursor on either the key (50030) or the text description (Faculty Other). Click and drag the item out of the report.
- 2. When the cursor shape changes to an **X**, release the mouse button.

Dragging an item out of a report is equivalent to excluding the item from the report. By contrast, the other filter methods described in this document (except Example 2) have selected items for inclusion.

Results and Next Steps

Use one of the filtering techniques described in this document to limit displayed BW report data so you can focus on the data of most interest to you.