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 one-button 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

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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 Example 2 demonstrates.

Example of inclusion	Example of exclusion
The report will be filtered to show only Commitment Items 500010 and 500020. The include icon ▬ indicates that the filter will select only entries *equal* 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 *not equal* to the specified values.

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.
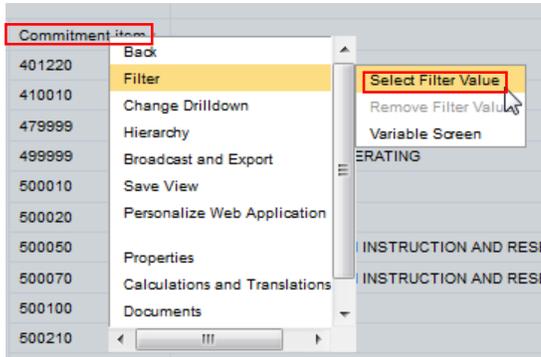
1. Right-click on **Commitment Item** column header to display the context menu.

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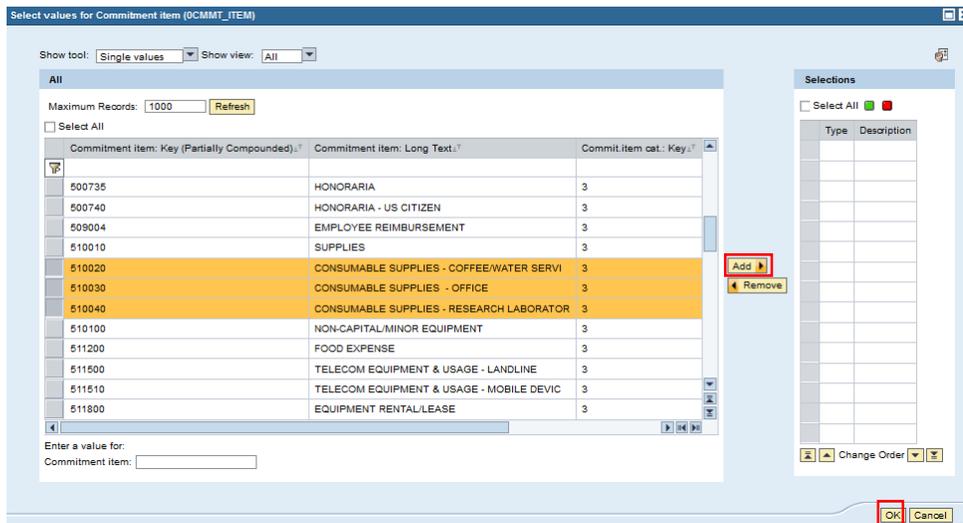
Select one or more items by clicking the gray button to the left of the item (click the button again to de-select an item). Alternatively, use the **Select All** check box to select all items displayed in list.

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	ed
Commitment item					$	$
510020	CONSUMABLE SUPPLIES - COFFEE/WATER SERVI					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
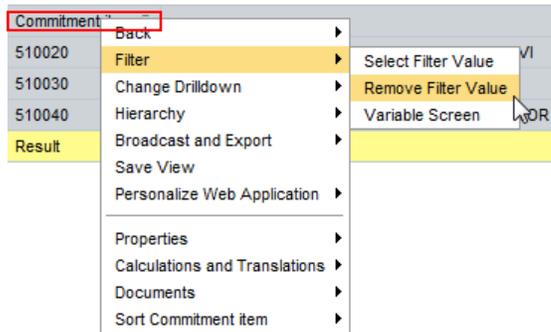
1. Right-click on Commitment Item column header to display the context menu

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.
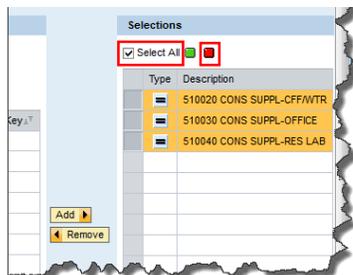
1. Follow instruction steps 1-5 in Example 1.

2. Click the **Select All** check box in the Selections column to select the items to be excluded.

3. Click the red Exclude button.
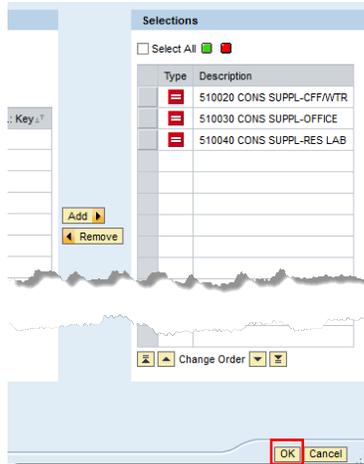
4. The exclusion icon ▬ indicates that the filter will be set to select all Commitment Items *not equal* to 510020, 510030, or 510040.

5. Click the **OK** button to activate the filter.

Example 3: filter using the Filter panel
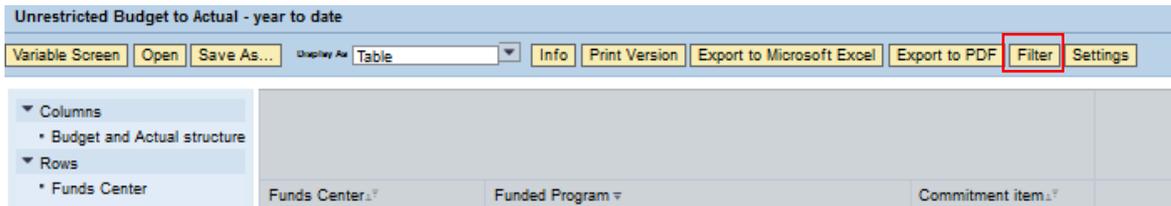
1. Click the **Filter** button to display the Filter Panel, which contains all report characteristics and their current filter settings.
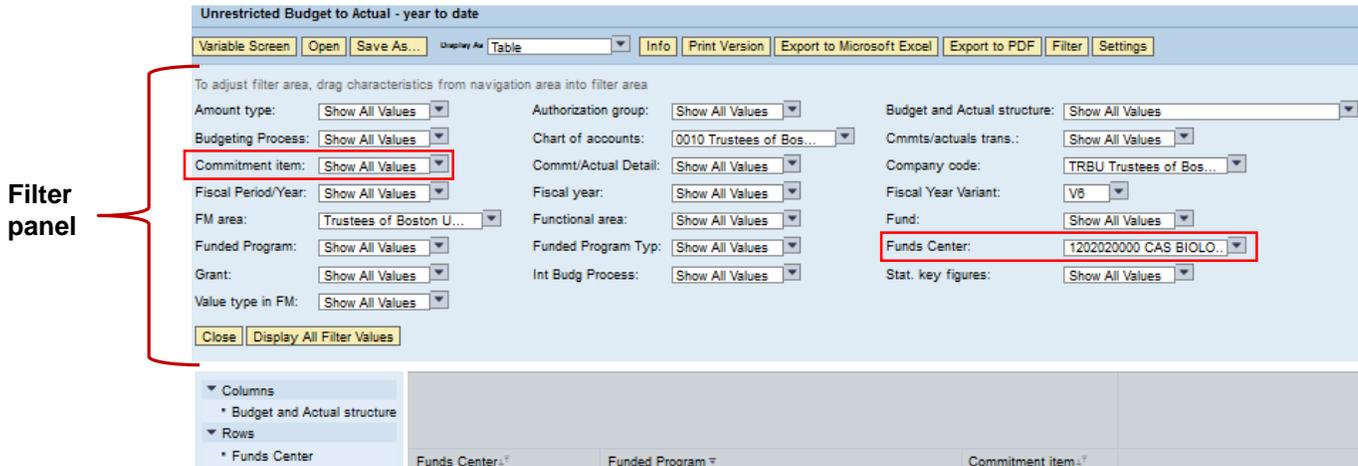
The Filter Panel shows the filter status of all characteristics in a report. "Show All Values" indicates that a characteristic is not being filtered. Anything other than "Show All Values" indicates the characteristic is being filtered. In the example above, **Commitment Item** is unfiltered. **Funds Center**, on the other hand, is being filtered to show a specific department.

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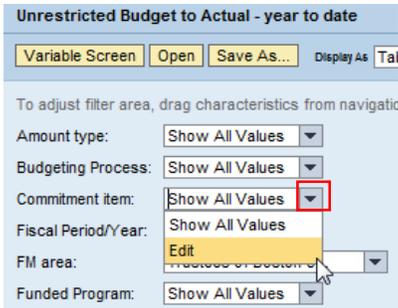
1. To filter, click the drop-down button ▼ to the right of **Commitment Item**. Slide the cursor down and click on **Edit**.

2. In the window that appears (example below), click on one or more **Commitment Items** to select them for filtering.
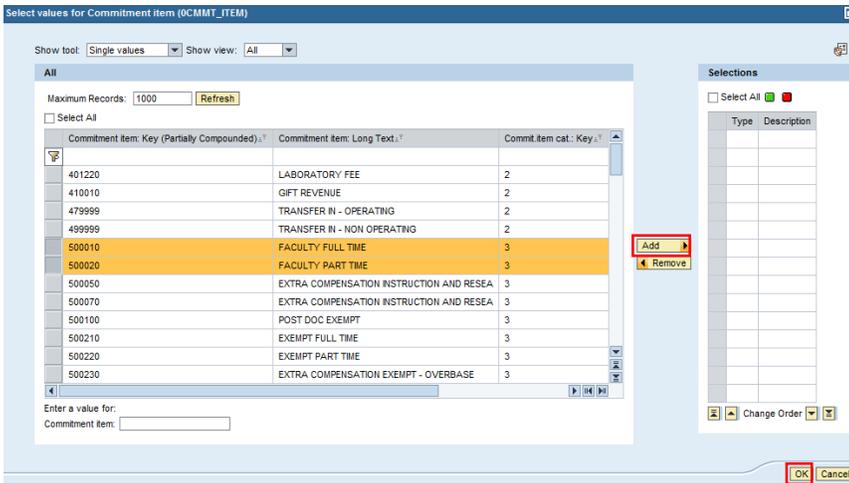
3. Click the **Add** button to copy the selected items to the Selections column.

4. Click the **OK** button to activate the filter.
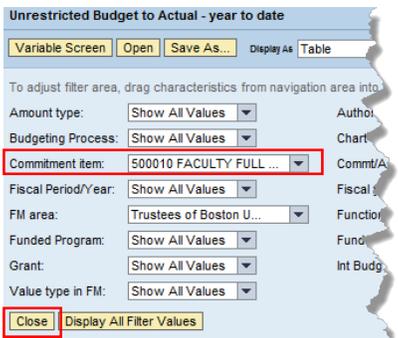
Result: Filter Panel shows selected filter values now in effect.

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

Remove filter value via the filter panel
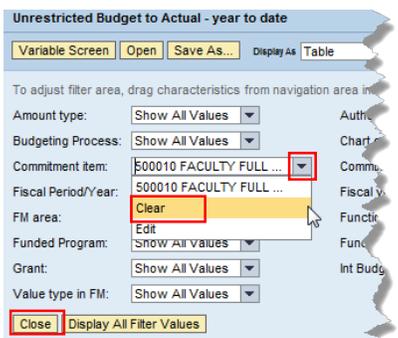
1. Display the filter panel (click the **Filter** button if panel is not visible).

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

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.

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

1. Right click on the filtered item to display the context menu.

2. Release the mouse button and slide the cursor down to **Filter**.

3. Click **Remove Filter Value**.

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.

Commitment item ⊥⊤		Recurring FY - 2012 ⊥⊤ Budget	Non-Recurring FY - 2012 ⊥⊤ Budget	Current FY - 2012 ⊥⊤ Budget
		$		$
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

1. 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.