

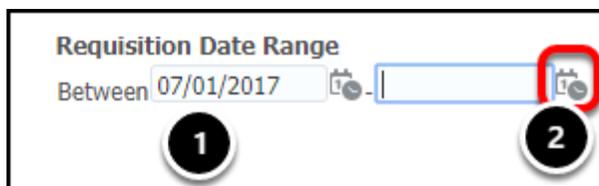
# Working with Filters

This article covers how to use the various types of filters available in the CSUF Data Warehouse.

## Using the Calendar Filter

The calendar filter allows you to filter by a single date or a range of dates.

### 1. You can type in a date or click on the calendar icon to select a date.



1. Enter the date in the following format: mm/dd/yyyy (e.g., 07/01/2017).
2. Or click on the calendar icon for the calendar view.

## 2. Select the date from the calendar view and then click OK.

The screenshot shows a 'Select Date and Time' dialog box. At the top, there are navigation arrows, a month dropdown set to 'June', and a year dropdown set to '2018'. Below this is a calendar grid for June 2018. The days of the week are listed as SUN, MON, TUE, WED, THU, FRI, SAT. The dates are arranged in rows. The date '30' is circled in red. Below the calendar, there are time selection controls: a dropdown for the hour (set to '12'), a dropdown for the minute (set to '00'), and a dropdown for the second (set to '00'). There are also AM/PM radio buttons, with 'AM' selected. At the bottom, there is a text field showing '(GMT) Greenwich Mean Time : Dublin, Edinl' and two buttons: 'OK' (circled in red) and 'Cancel'.

## 3. Click Apply to apply your filter or add additional filter criteria.

The screenshot shows a filter configuration form. At the top, there is a section titled 'Requisition Date Range' with a 'Between' label and two date pickers: '07/01/2017' and '06/30/2018 12:'. Below this are several dropdown menus: 'Requisition #' (set to '--Select Value--'), 'REQ\_STATUS' (set to '--Select Value--'), 'Division' (set to '--Select Value--'), 'Sub-Division' (set to '--Select Value--'), 'Sub-Division/College' (set to '--Select Value--'), and 'Department/College' (set to '--Select Value--'). At the bottom right, there are two buttons: 'Apply' (circled in red) and 'Reset' (with a dropdown arrow).

## Selecting from Drop-Down Menus

The drop-down menus allow you to select from a list of values.

## 1. Click on a drop-down menu to view the available criteria.

Fiscal Year: 2018  
Accounting Period: 1

Fund: --Select Value--  
Account: --Select Value--  
Program: --Select Value--  
Class: --Select Value--  
Project: --Select Value--

Division: --Select Value--  
Sub-Division/College: --Select Value--  
Master Department: --Select Value--  
**Department: --Select Value--**

## 2. Select the value(s) that you wish to use.

**1** Department: --Select Value--

- 10001 - A&R Info Technology
- 10002 - Academic Advisement Center
- 10003 - Academic Senate
- 10004 - Accounting
- 10005 - Accounting & Financial Rpting

More/Search...

**2** Fiscal Year: 2018

- 2018
- 2017
- 2016
- 2015

Search...

1. Some menus will allow you to choose more than one option. Place a checkmark next to each value you want to use.
2. Some drop-down menus will only allow you to select a single option.

## 3. Click Apply to apply your filter or add additional filter criteria.

Fiscal Year: 2018  
Accounting Period: 1

Fund: --Select Value--  
Account: --Select Value--  
Program: --Select Value--  
Class: --Select Value--  
Project: --Select Value--

Division: --Select Value--  
Sub-Division/College: --Select Value--  
Master Department: --Select Value--  
Department: 10002 - Academic Advisement Center;10003 - A

**Apply** Reset

# Using More/Search to Find Values

The More/Search option allows you to search for values as well as easily select one or more values to include or exclude from your report.

## 1. Click on a drop-down menu.

The screenshot shows a filter selection interface with the following fields:

- Fiscal Year:** 2018
- Accounting Period:** 1
- Fund:** --Select Value--
- Account:** --Select Value-- (highlighted with a red box)
- Program:** --Select Value--
- Class:** --Select Value--
- Project:** --Select Value--
- Division:** --Select Value--
- Sub-Division/College:** --Select Value--
- Master Department:** --Select Value--
- Department:** --Select Value--

## 2. Click the More/Search option at the bottom.

💡 Depending on how many values are available, this option may be called either "More/Search" or just "Search."

The screenshot shows the 'Account' dropdown menu expanded, displaying a list of account options with checkboxes:

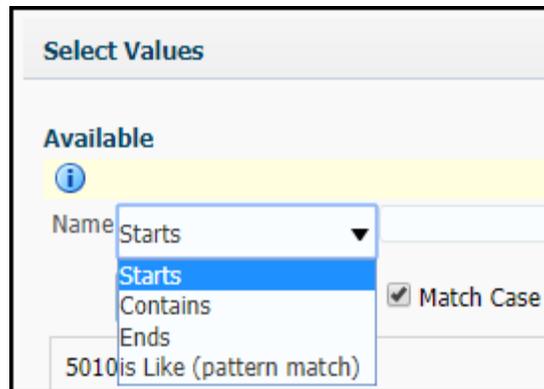
- 501001 - Tuition Fee - Fall
- 501002 - Non-Resident Tuition Fee-Fall
- 501004 - Application Fee - Curr Yr Fall
- 501005 - INACT Stud Hlth Svcs Fee-Fall
- 501102 - INACT Instr Reltd Act Fee-Fall

At the bottom of the dropdown menu, the text "More/Search..." is highlighted with a red box.

## Searching for Values

Searching for values allows you to quickly find and add the values you want to your report.

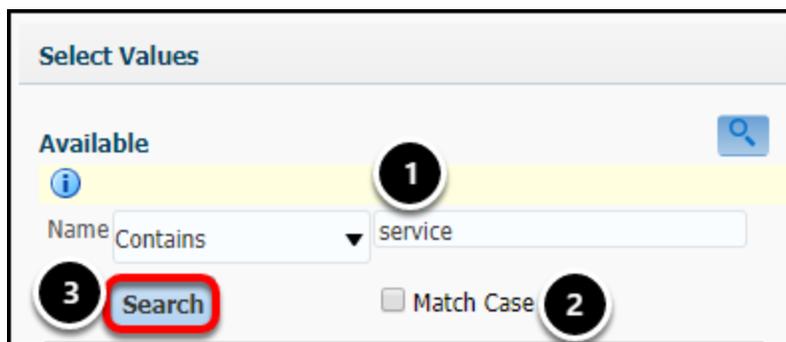
### 1. To search for a value, first choose the type of search you wish to use.



Available search types are:

- Starts
- Contains
- Ends
- is LIKE (pattern match)

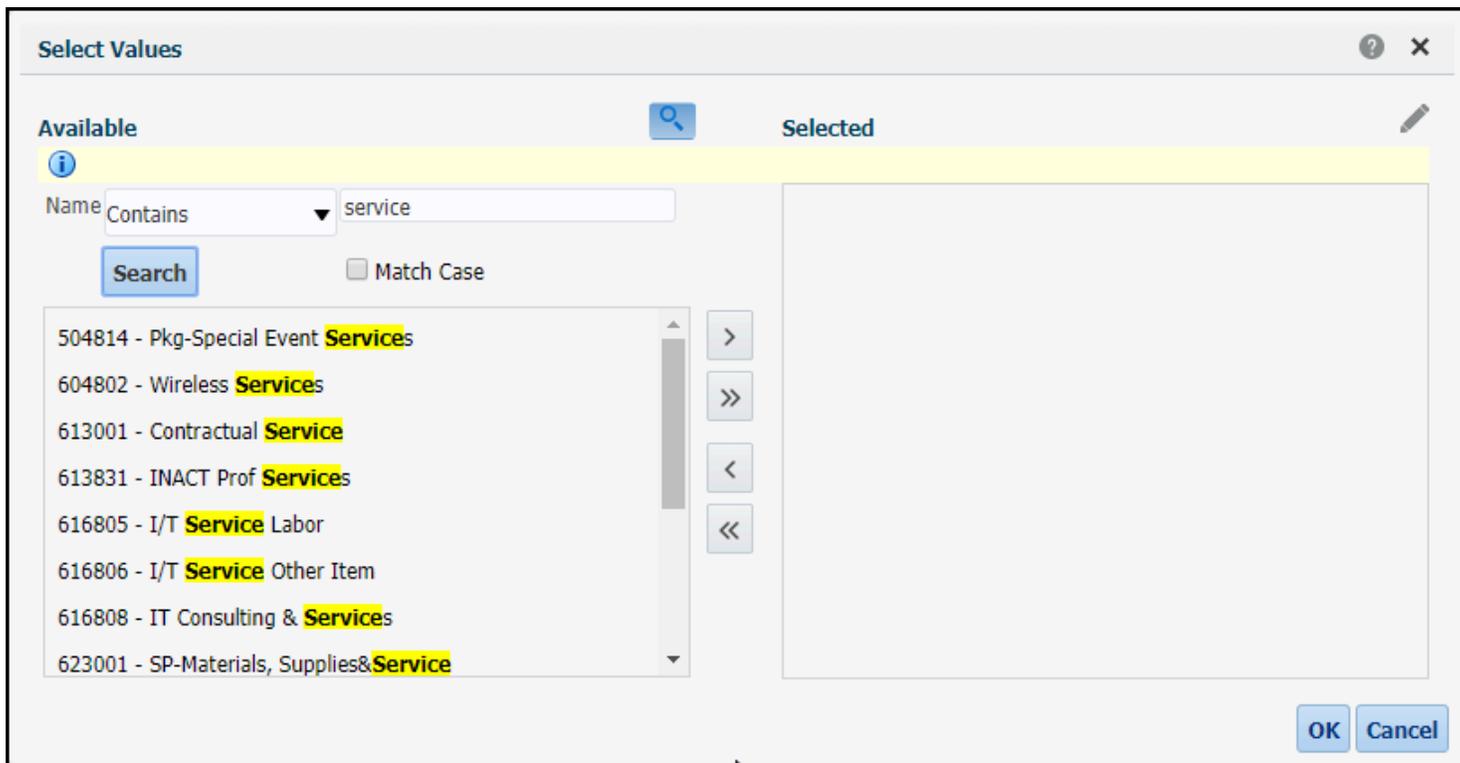
### 2. Enter your search criteria and click Search.



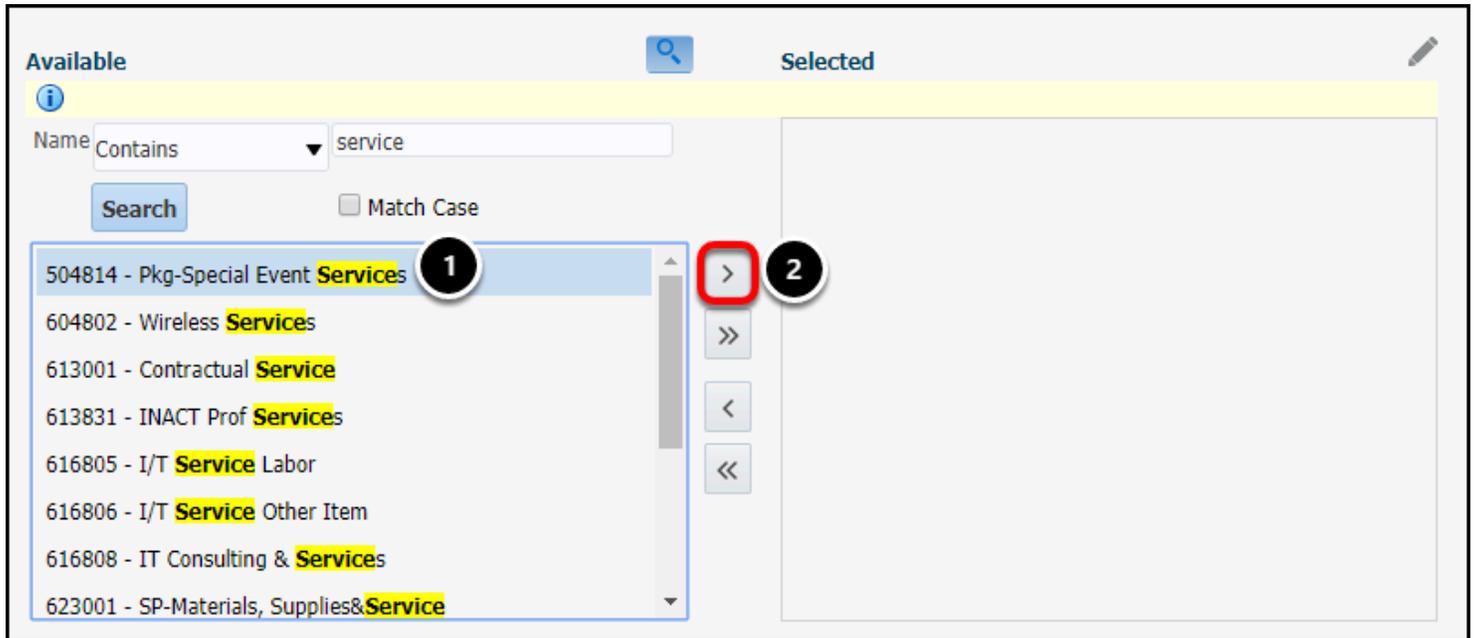
1. Enter your search criteria.
2. Note the Match Case flag. If you aren't sure of the case of the name of the value, you may want to uncheck this box. (i.e., if you enter "supplies" and the value is "General Supplies" then the system will not find a match if this box is checked.)

3. Click **Search**.

### 3. A list of search results appears.

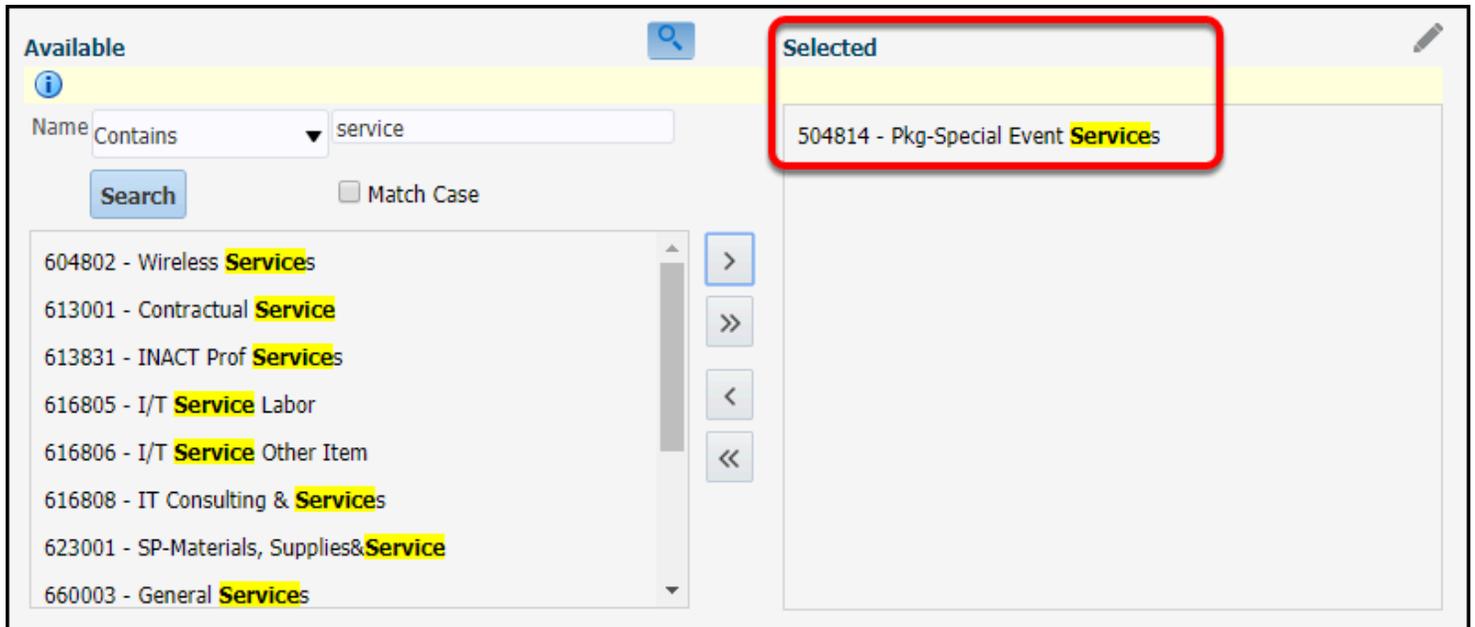


### 3.1. To select a single value, click on the value and then click on the Move arrow icon.



1. Click on a value on the left.
2. Click on the right arrow (Move) button.

### 3.2. The value now appears in the Selected section.

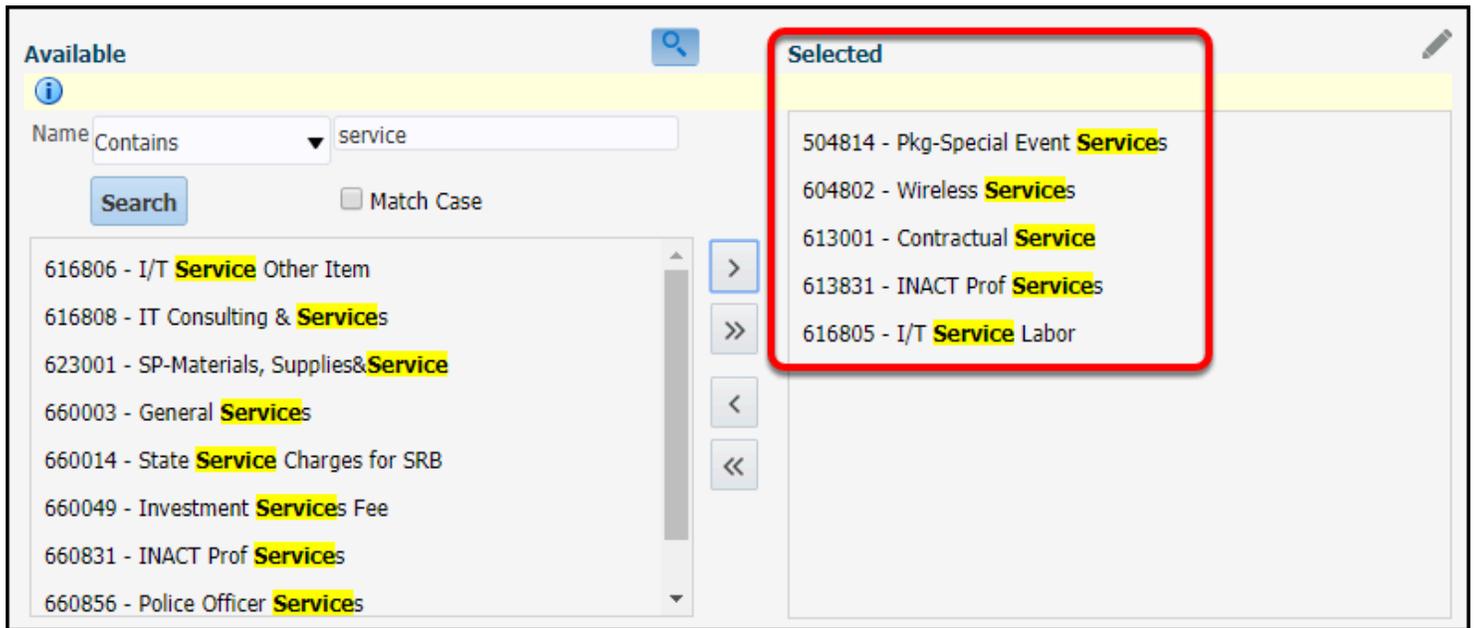


**3.3. To select multiple consecutive values, hold down the Shift key as you click on the first value in the range. Continue to hold the Shift key as you click on the last value in the range. Then click on the Move arrow icon.**

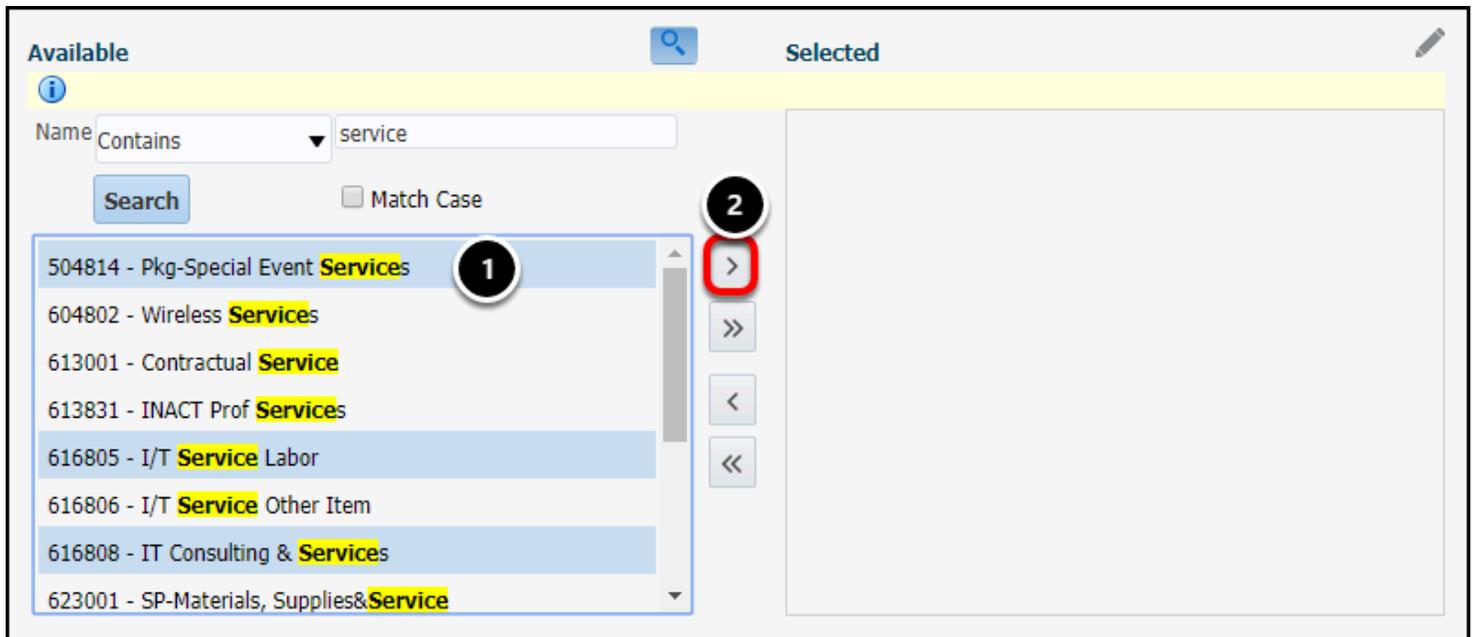


1. Hold down the Shift key as you select the first value in the range and continue holding down Shift as you click on the last value in the range.
2. Click on the right arrow (Move) button.

### 3.4. The values now appear in the Selected section.



### 3.5. To select non-consecutive values, hold down the CTRL key (or the Command key if you are a Mac user) as you click on the first value. Continue to hold down the CTRL or Command key as you select each subsequent value. Then click on the Move arrow icon.

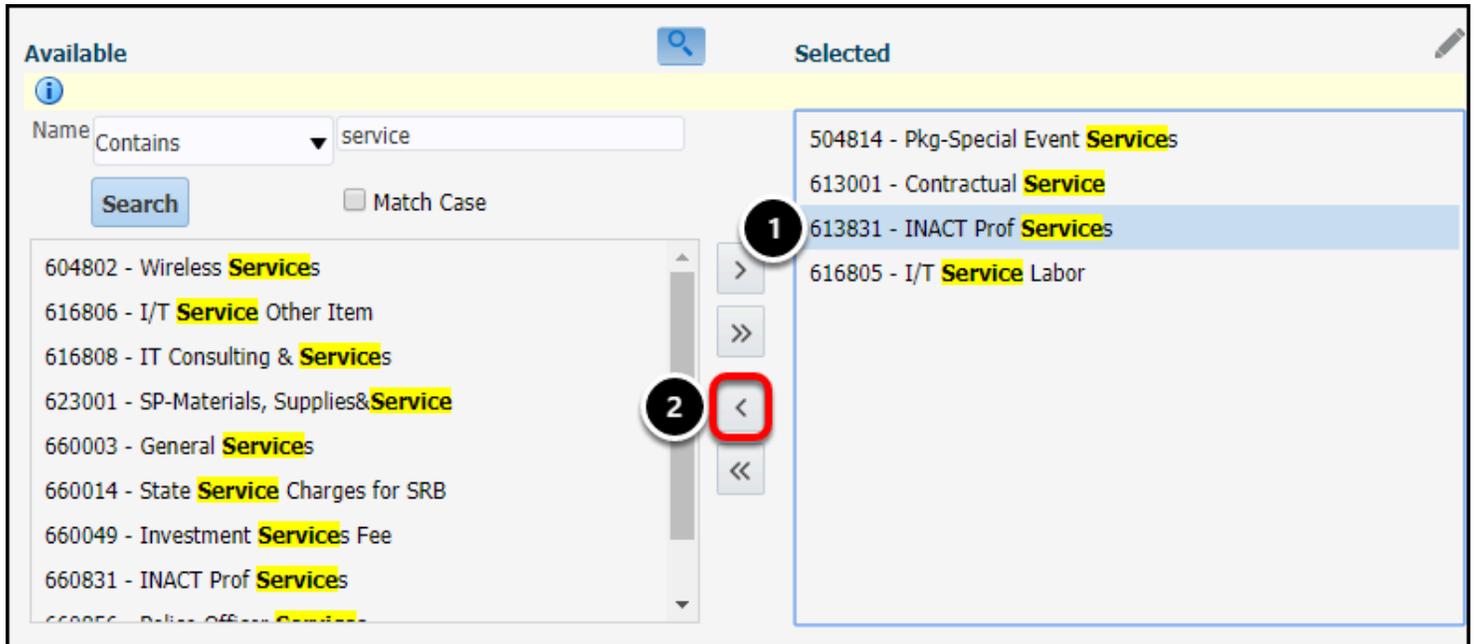


1. Hold down the CTRL (or Command) key as you select the first value and continue holding down CTRL/Command as you click as you select each subsequent value.
2. Click on the right arrow (Move) button.

### 3.6. The values now appear in the Selected section.

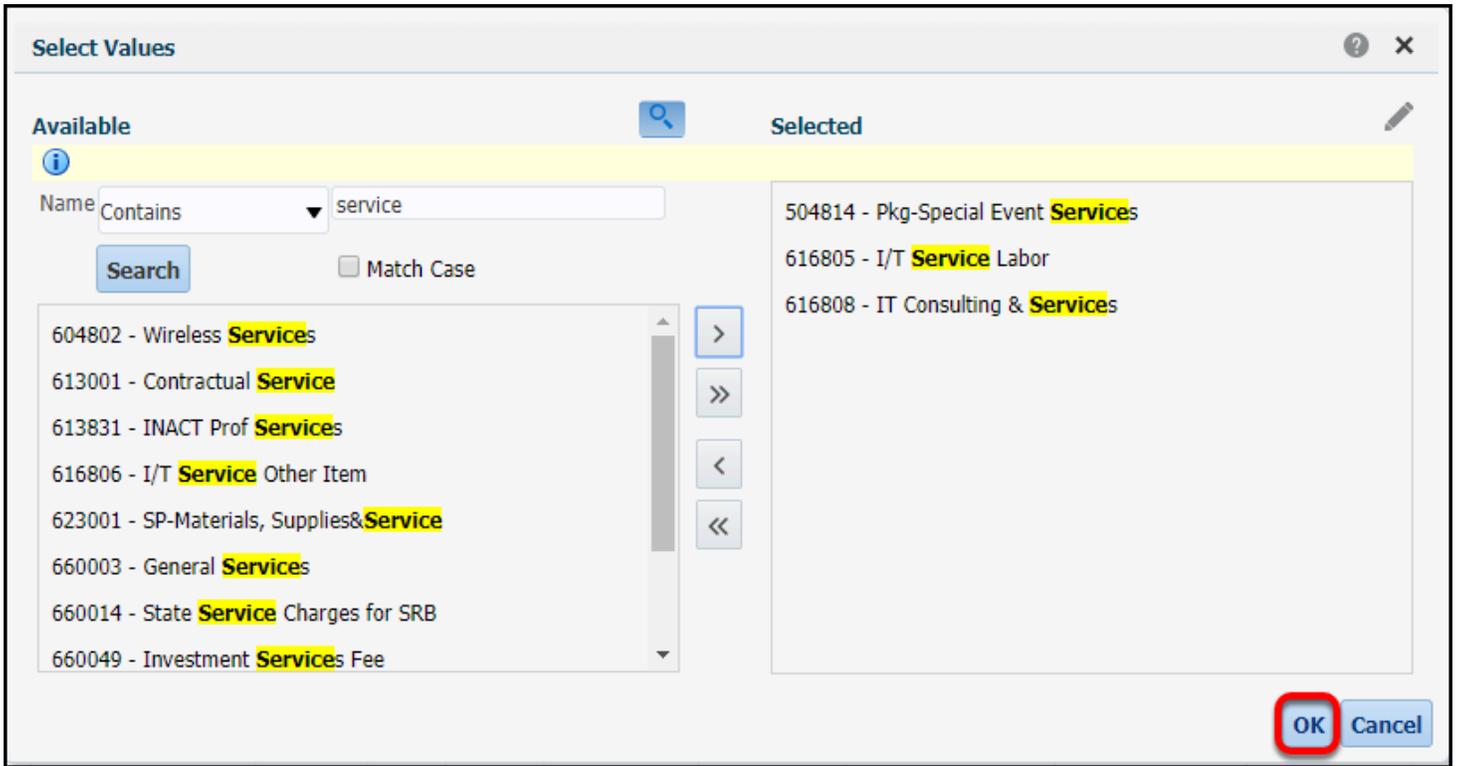
The screenshot displays a software interface with two main panels: 'Available' and 'Selected'. The 'Available' panel on the left contains a search bar with the text 'service' and a 'Search' button. Below the search bar is a list of items, each with a numerical ID and a description. The 'Selected' panel on the right, highlighted with a red border, contains three items that have been moved from the 'Available' list. The items in the 'Selected' panel are: '504814 - Pkg-Special Event Services', '616805 - I/T Service Labor', and '616808 - IT Consulting & Services'. The 'Available' list includes items such as '604802 - Wireless Services', '613001 - Contractual Service', '613831 - INACT Prof Services', '616806 - I/T Service Other Item', '623001 - SP-Materials, Supplies & Service', '660003 - General Services', '660014 - State Service Charges for SRB', and '660049 - Investment Services Fee'. Navigation arrows are visible between the two panels.

**4. To remove one or more values, select the value(s) on the right. Then click on the Remove arrow button.**



1. Click on a value on the left or you can use the Shift or CTRL/Command keys to select consecutive or non-consecutive values.
2. Click on the left arrow (Remove) button.

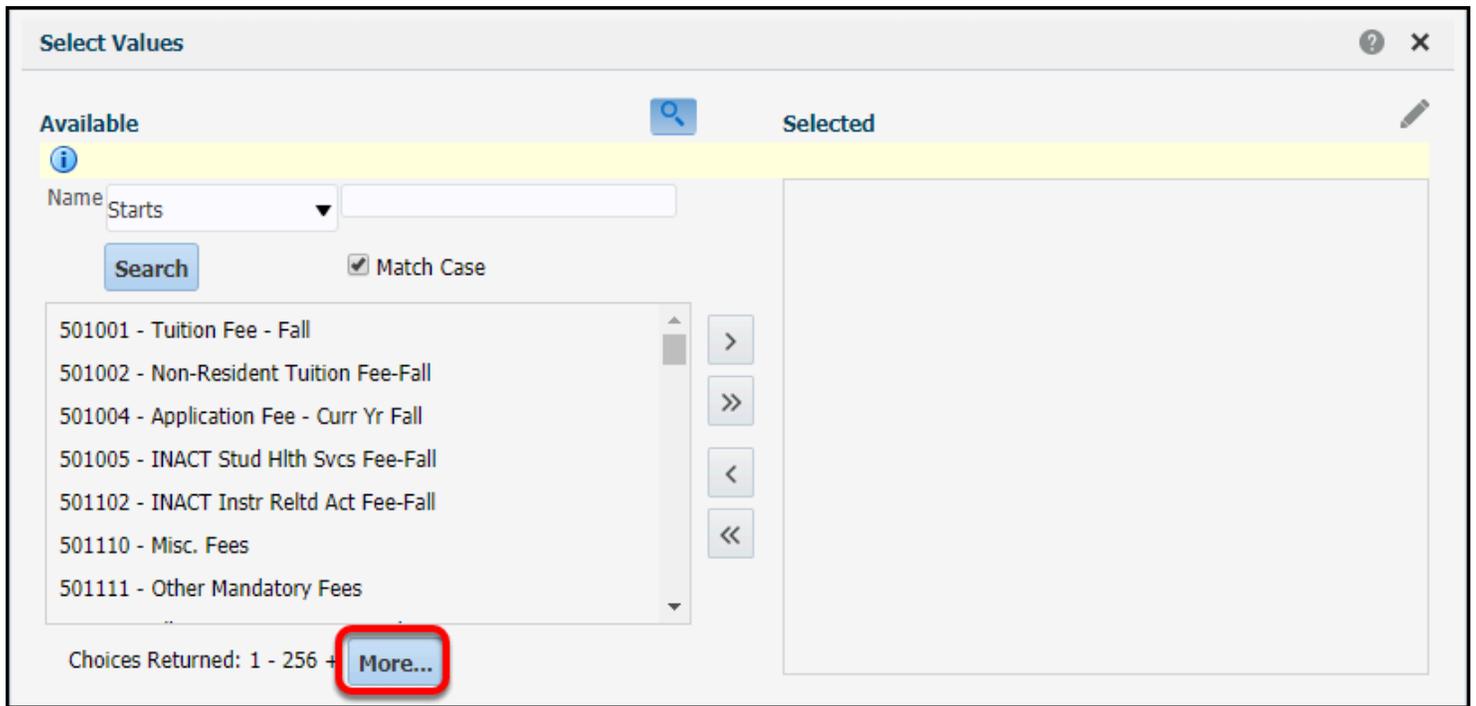
**5. Once all of the values you want on your report appear in the Selected column, click OK.**



## Select All/Remove All Values

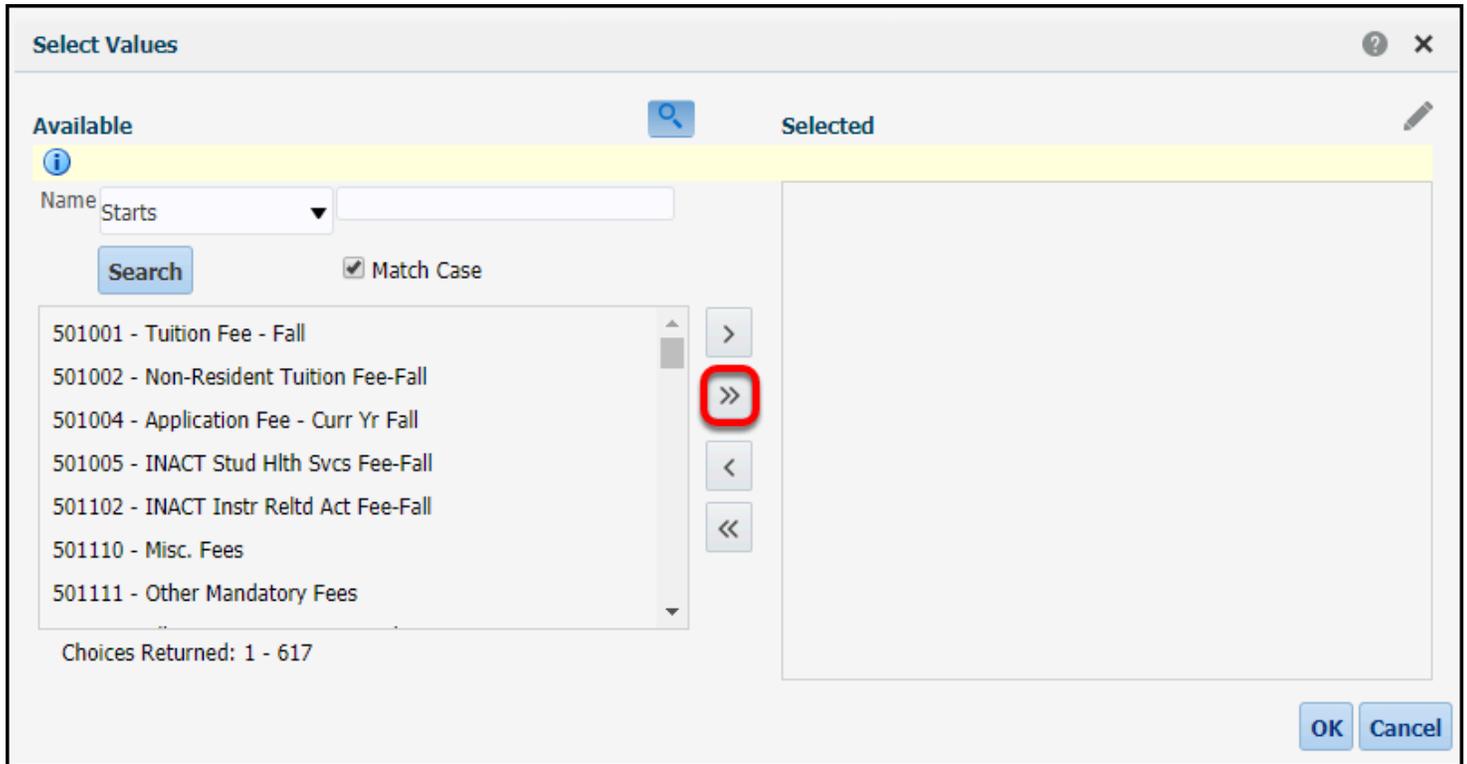
**1. To Move All values, click on the More button until it disappears in order to view all available values.**

**!** Note that there are some fields in the CSUF Data Warehouse that have thousands of available values.



Before selecting all values, you will want to ensure that all the available values are showing. In the example above, you can see that the system is only showing the first 256 values and that more are available.

## 1.1. Then click the Move All arrow button to move all values to the Selected column.



Once the More button disappears, you can now move all of the values to the Selected column.

## 2. To Remove All values, click on the Remove All arrow button.

The screenshot shows a 'Select Values' dialog box with two main panes: 'Available' and 'Selected'. The 'Available' pane has a search bar with 'Starts' in the dropdown, a 'Search' button, and a 'Match Case' checkbox. The 'Selected' pane contains a list of fee items. Between the panes are navigation buttons: '>', '>>', '<', and '<<'. The '<<' button is circled in red. At the bottom right are 'OK' and 'Cancel' buttons. The text 'Choices Returned: 1 - 617' is visible at the bottom left of the dialog.

Available	Selected
Name: Starts <input type="button" value="Search"/> <input checked="" type="checkbox"/> Match Case	501001 - Tuition Fee - Fall 501002 - Non-Resident Tuition Fee-Fall 501004 - Application Fee - Curr Yr Fall 501005 - INACT Stud Hlth Svcs Fee-Fall 501102 - INACT Instr Reltd Act Fee-Fall 501110 - Misc. Fees 501111 - Other Mandatory Fees 501112 - All Categ 4 Fees in CSU Fd 485 501400 - Allow for Dbtfl Higher Edn Fee 501801 - Tuition Fee - Spring 501802 - Tuition Fee - Summer

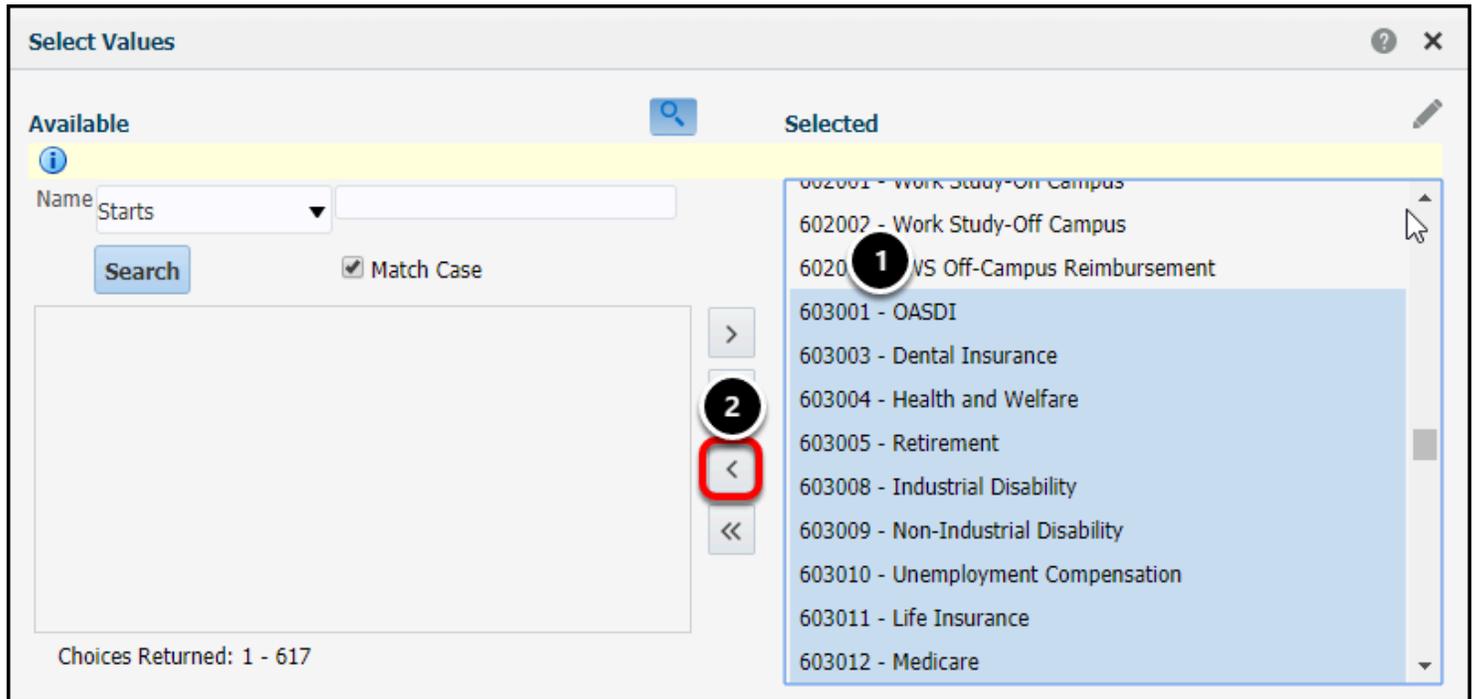
## 2.1. The Selected column is now empty.

The screenshot shows a 'Select Values' dialog box with two columns: 'Available' and 'Selected'. The 'Available' column contains a list of items, and the 'Selected' column is empty. The 'Available' column has a search bar with the text 'Starts' and a 'Search' button. Below the search bar is a list of items with a scroll bar and navigation buttons. The 'Selected' column is empty and has a pencil icon in the top right corner.

Available	Selected
<p>501001 - Tuition Fee - Fall</p> <p>501002 - Non-Resident Tuition Fee-Fall</p> <p>501004 - Application Fee - Curr Yr Fall</p> <p>501005 - INACT Stud Hlth Svcs Fee-Fall</p> <p>501102 - INACT Instr Reltd Act Fee-Fall</p> <p>501110 - Misc. Fees</p> <p>501111 - Other Mandatory Fees</p> <p>Choices Returned: 1 - 617</p>	

## Removing Values from the Selected Column

1. To remove one or more values from the Selected column, click on the value or values that you want to remove.



1. Select one or more values in the Selected column. You can use the Shift or Ctrl/Command key to select multiple values.
2. Click on the left arrow (Remove) button.

## 2. The values that you remove now appear in the Available column.

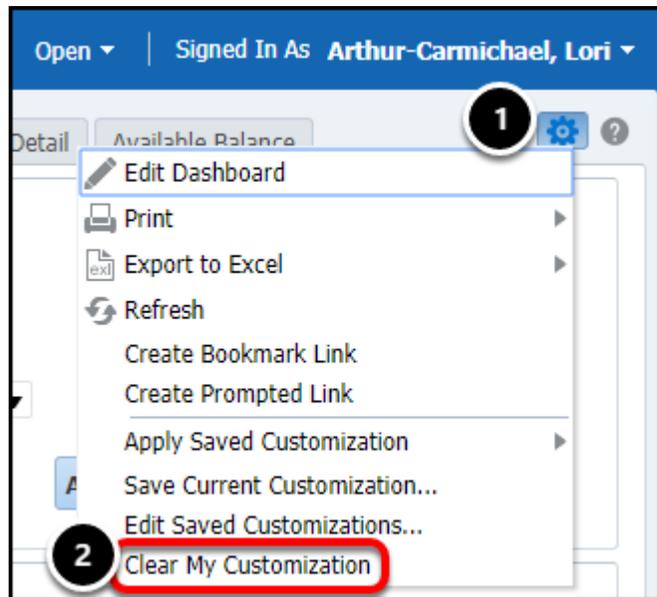
The screenshot shows a 'Select Values' dialog box with two columns: 'Available' and 'Selected'. The 'Available' column contains a list of account codes, with a red box highlighting the first seven items: 603001 - OASDI, 603003 - Dental Insurance, 603004 - Health and Welfare, 603005 - Retirement, 603008 - Industrial Disability, 603009 - Non-Industrial Disability, and 603010 - Unemployment Compensation. The 'Selected' column contains a list of account codes: 602001 - Work Study-On Campus, 602002 - Work Study-Off Campus, 602011 - FWS Off-Campus Reimbursement, 604001 - Telephone Usage, 604002 - Computer Networks, 604090 - Other Communications, 604801 - INACT Telephone Exchange, 604802 - Wireless Services, 605001 - Electricity, 605002 - Natural Gas, 605004 - Water, and 605005 - Sewage (PP Use Only). The dialog box also features a search bar with a dropdown menu set to 'Starts', a 'Search' button, and a 'Match Case' checkbox. The 'Available' column has a search icon and a list of account codes. The 'Selected' column has a list of account codes and a search icon. The dialog box is titled 'Select Values' and has a close button in the top right corner.

This type of selection allows you to exclude (or include) only specific values. In the example above, this filter will exclude all of the benefits account codes but include all other account codes (if there are transactions for them).

## Clearing Your Filters

If you want to return to the default values for the page/report that you are viewing, you can clear your customizations or reset your filters.

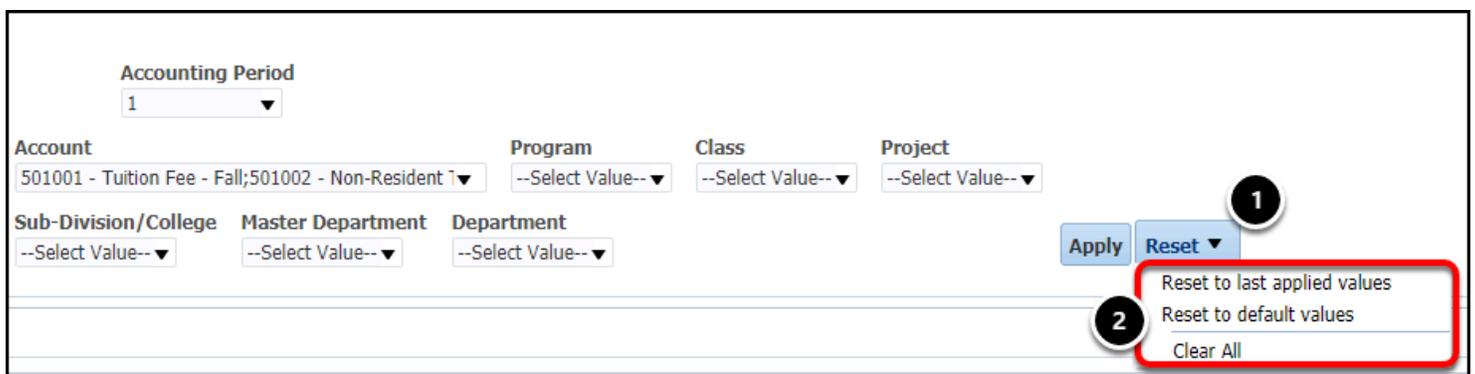
# 1. Click on Page Options at the top right of the page. Then select Clear My Customization.



1. Select the Page Options gear icon under your name at the top right of the screen.
2. Then select **Clear My Customization**.

## 1.1. All of your filter criteria are removed and your results are returned to the default for that Page/report.

## 2. Or you can click Reset and then choose an option.



1. Click the **Reset** button.
2. Select an option:

- **Reset to last applied values:** removes any changes to the filters that you have made since the last time you hit the Apply button.
- **Reset to default values:** resets the report to the default filters for the report.
- **Clear All:** NOT RECOMMENDED. When you choose this option, all filters are cleared out and you may not be able to run the report again until you enter values in one or more fields.

## 2.1. Depending on the option you choose, you may have to click Apply for the settings to be applied.

## Saving Your Filters

[View the article on Saving Your Customizations & Filters](#) to find out more about saving your filters for future use.

## Need More Help?

For technical assistance with the Data Warehouse, please contact the IT Help Desk at [helpdesk@fullerton.edu](mailto:helpdesk@fullerton.edu) or 657-278-7777.

For questions about getting access to the Data Warehouse or how to use the reports, please contact IT Training at [ittraining@fullerton.edu](mailto:ittraining@fullerton.edu) or 657-278-5647.