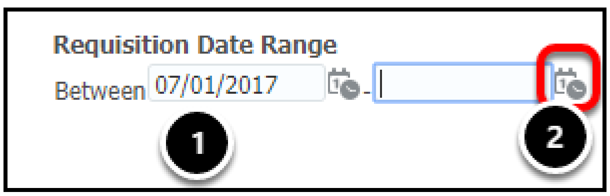
Working with Filters

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

Using the Calendar Filter

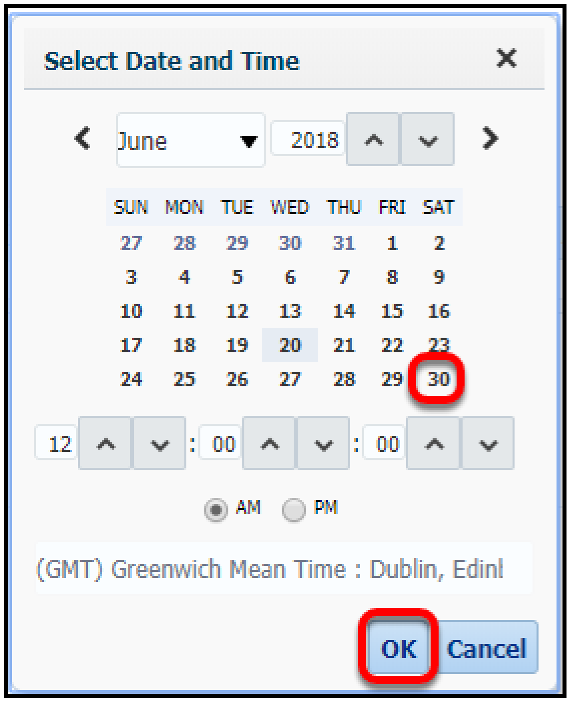
The calendar filter allows you to filter by a single date or a range of dates.

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

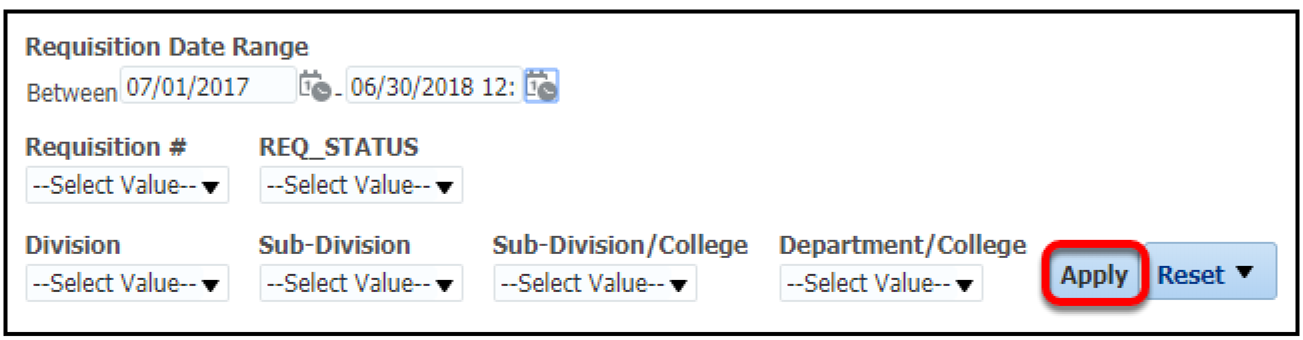


1. Enter the date in the following format: mm/dd/yyyy (e.g., 07/01/2017).
2. Or click on the calendar icon for the calendar view.

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



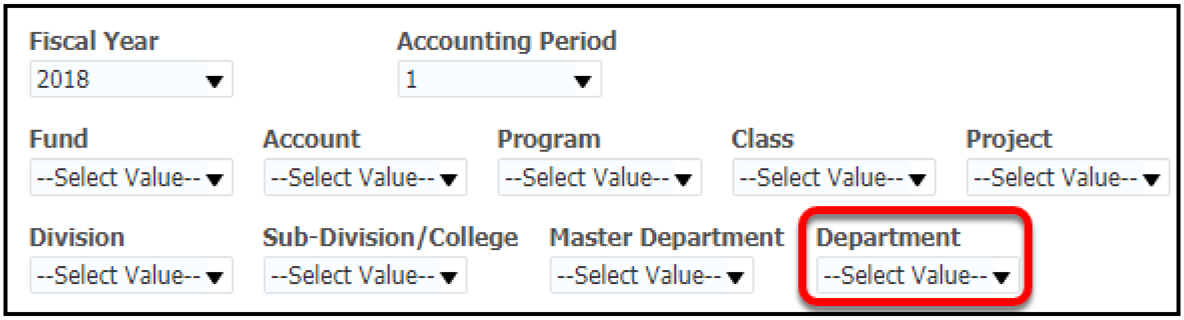
3. Click Apply to apply your filter or add additional filter criteria.



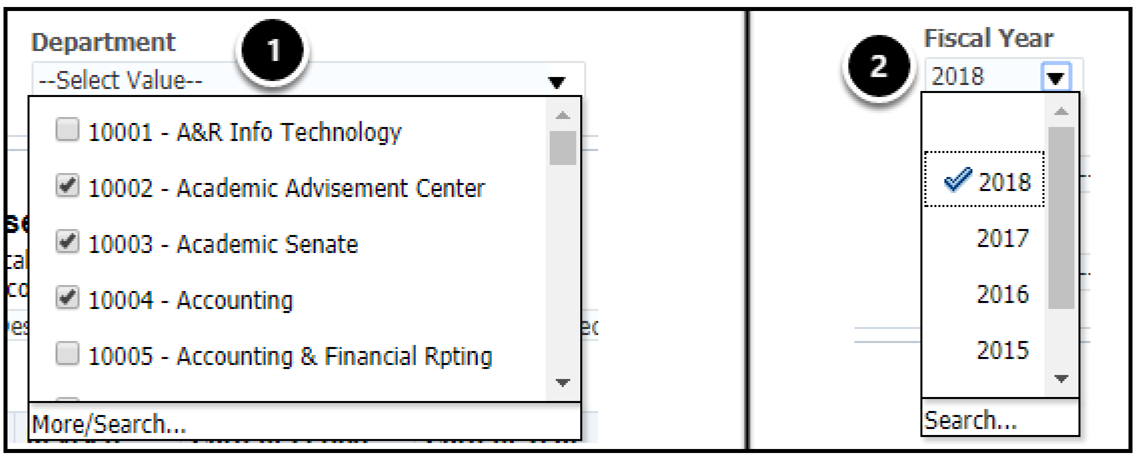
Selecting from Drop-Down Menus

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.

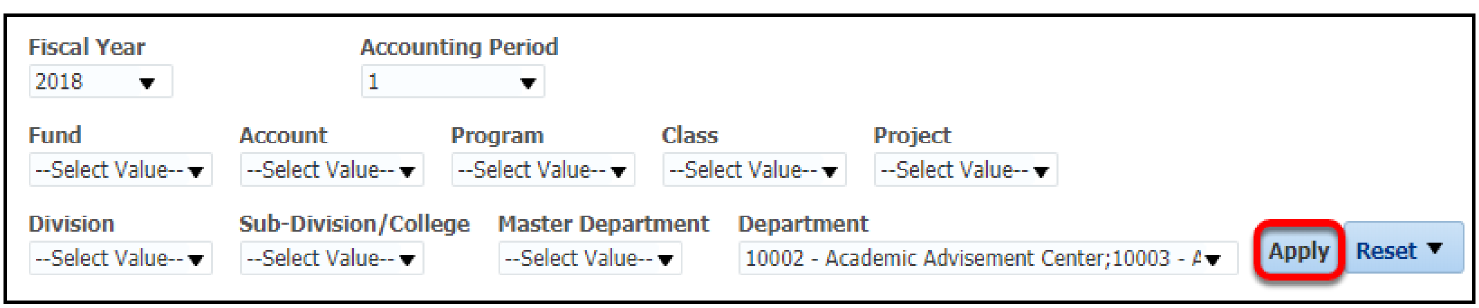


2. Select the value(s) that you wish to use.



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.

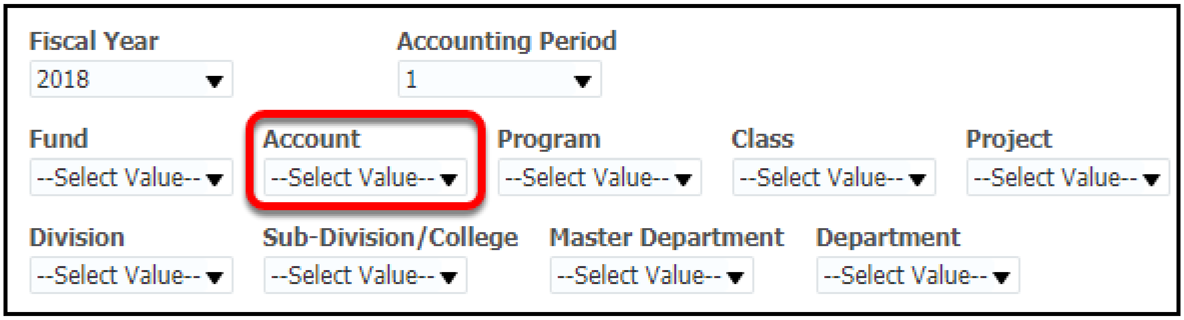
3. Click Apply to apply your filter or add additional filter criteria.



Using More/Search to Find Values

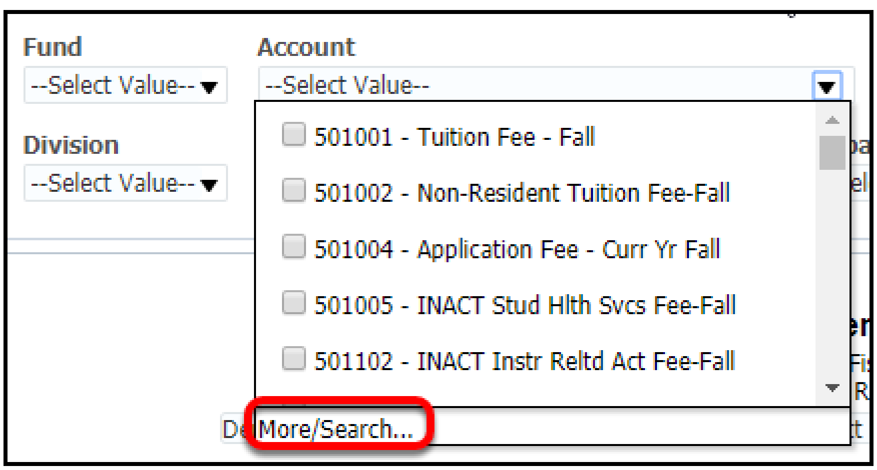
The More/Search option allows you to search for values as well as easily select one or more values to include or exclude from your report.

1. Click on a drop-down menu.



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

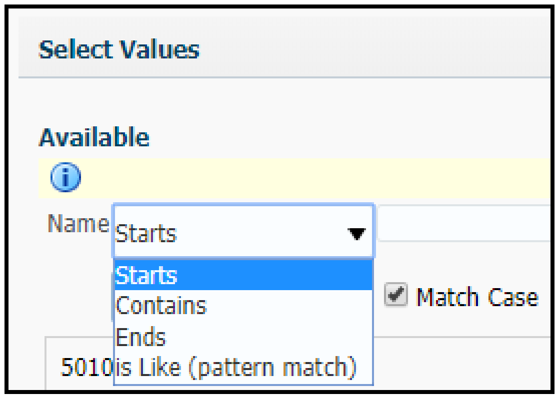
Depending on how many values are available, this option may be called either “More/Search” or just “Search.”



Searching for Values

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

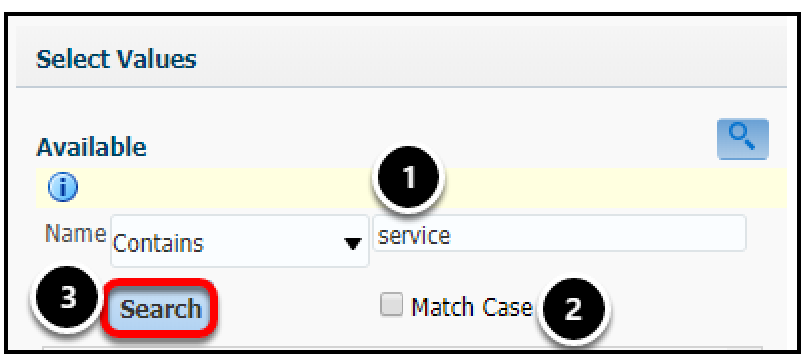
1. To search for a value, first choose the type of search you wish to use.



Available search types are:

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

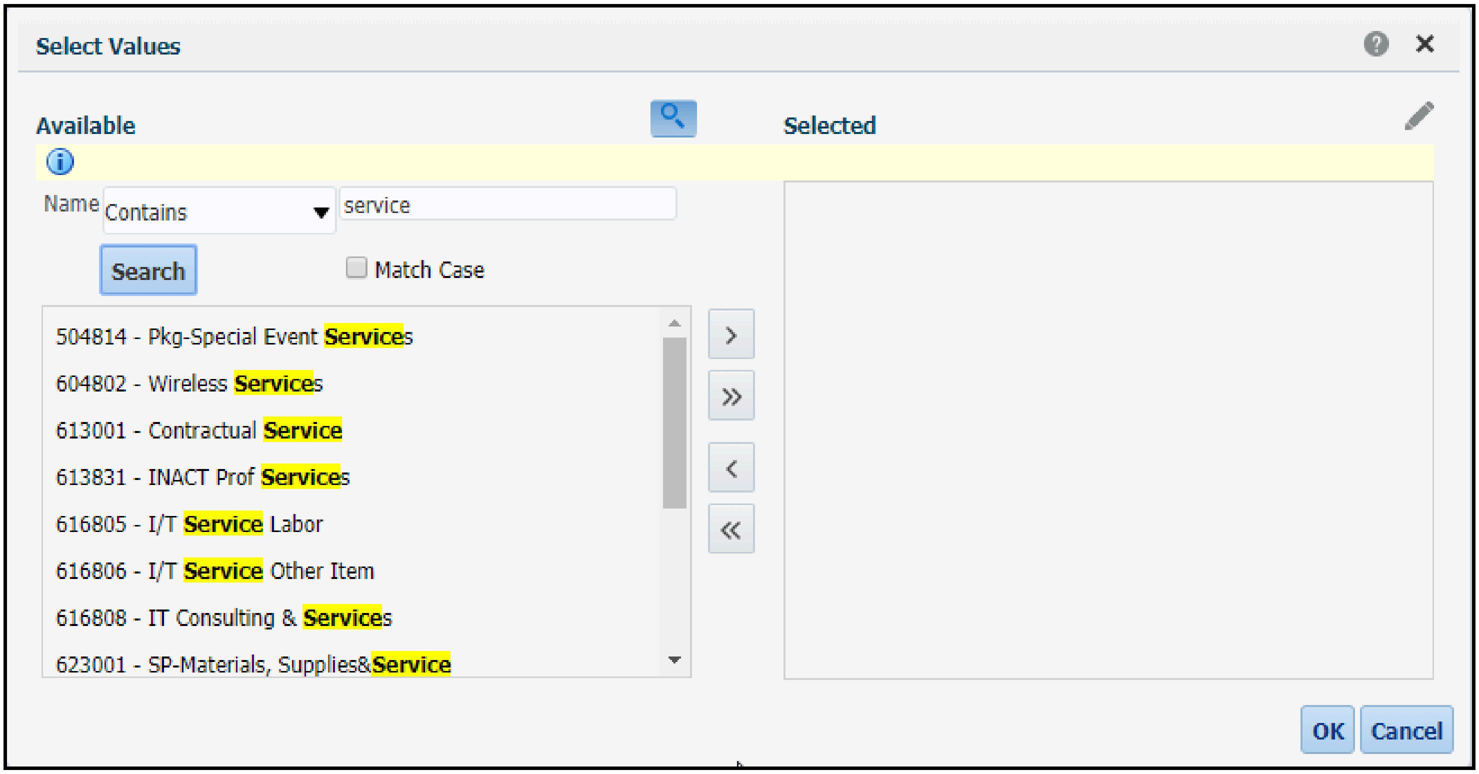
2. Enter your search criteria and click Search.



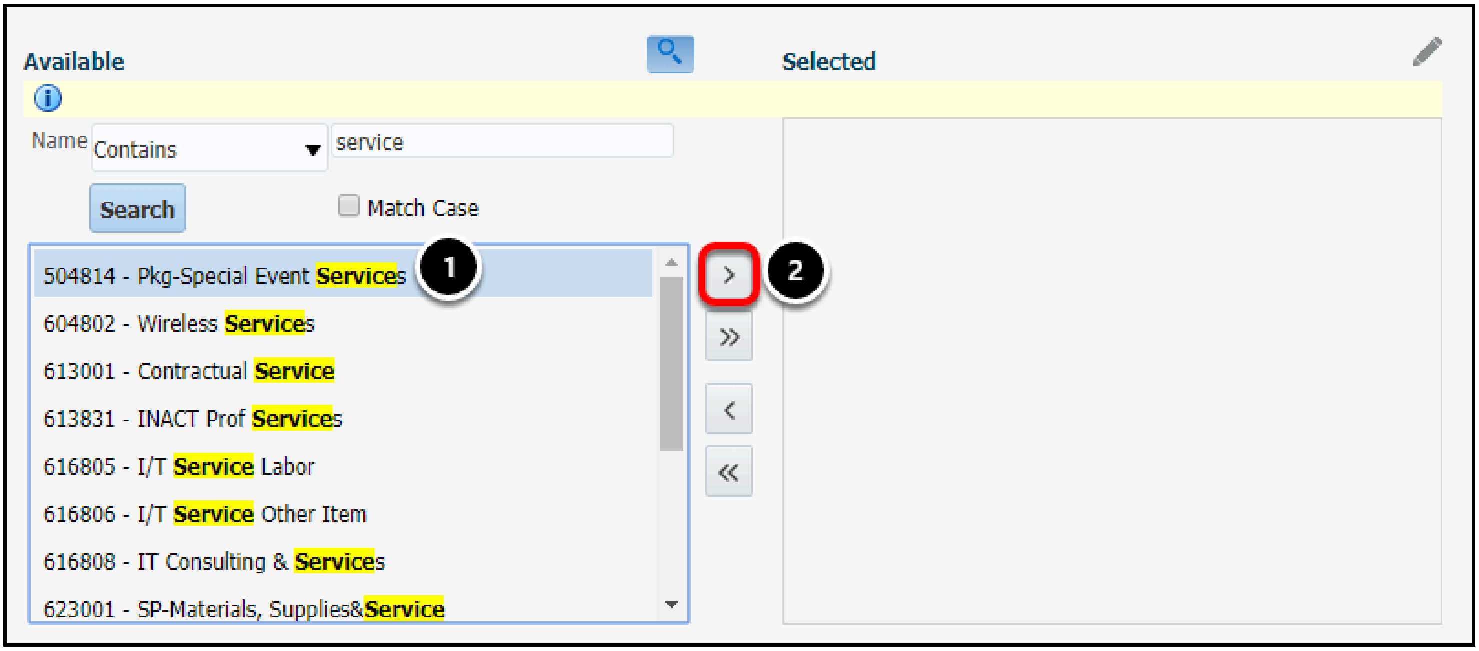
1. Enter your search criteria.
2. Note the Match Case flag. If you aren't sure of the case of the name of the value, you may want to uncheck this box. (i.e., if you enter “supplies” and the value is “General Supplies” then the system will not find a match if this box is checked.)

3. Click **Search**.

3. A list of search results appears.

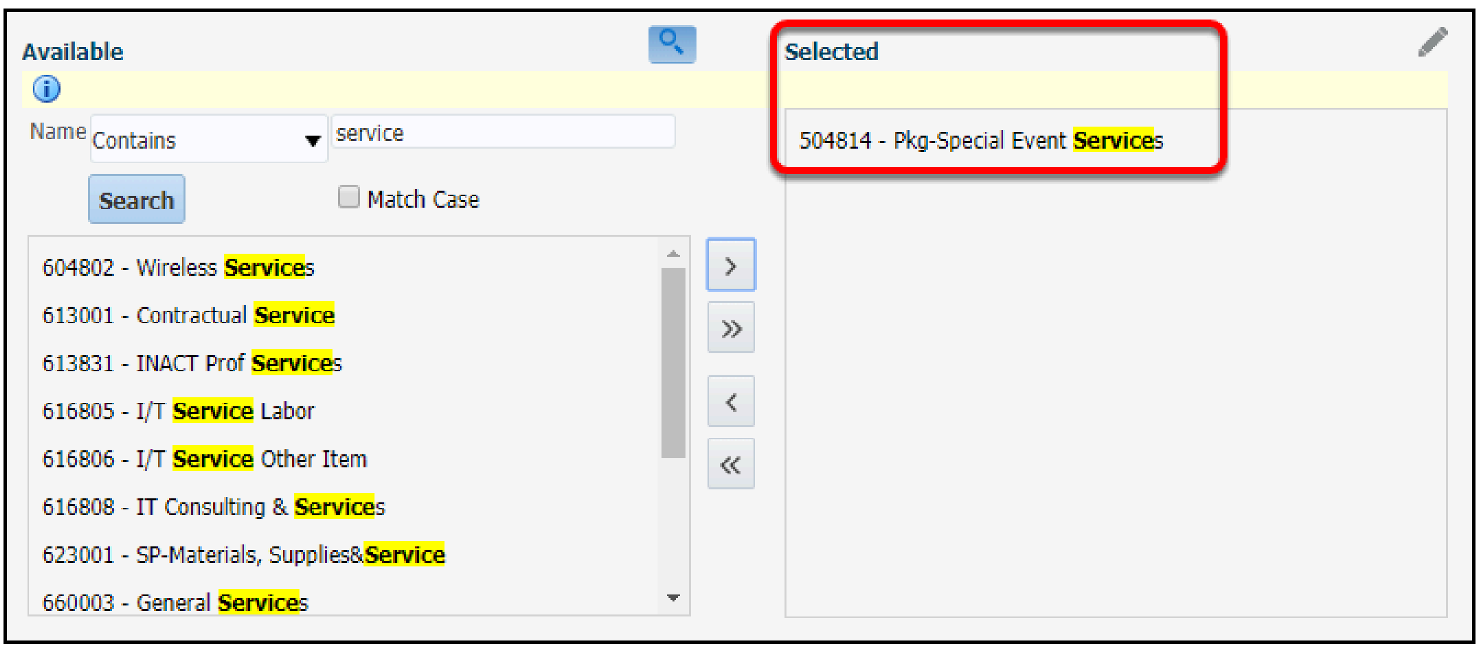


3.1. To select a single value, click on the value and then click on the Move arrow icon.

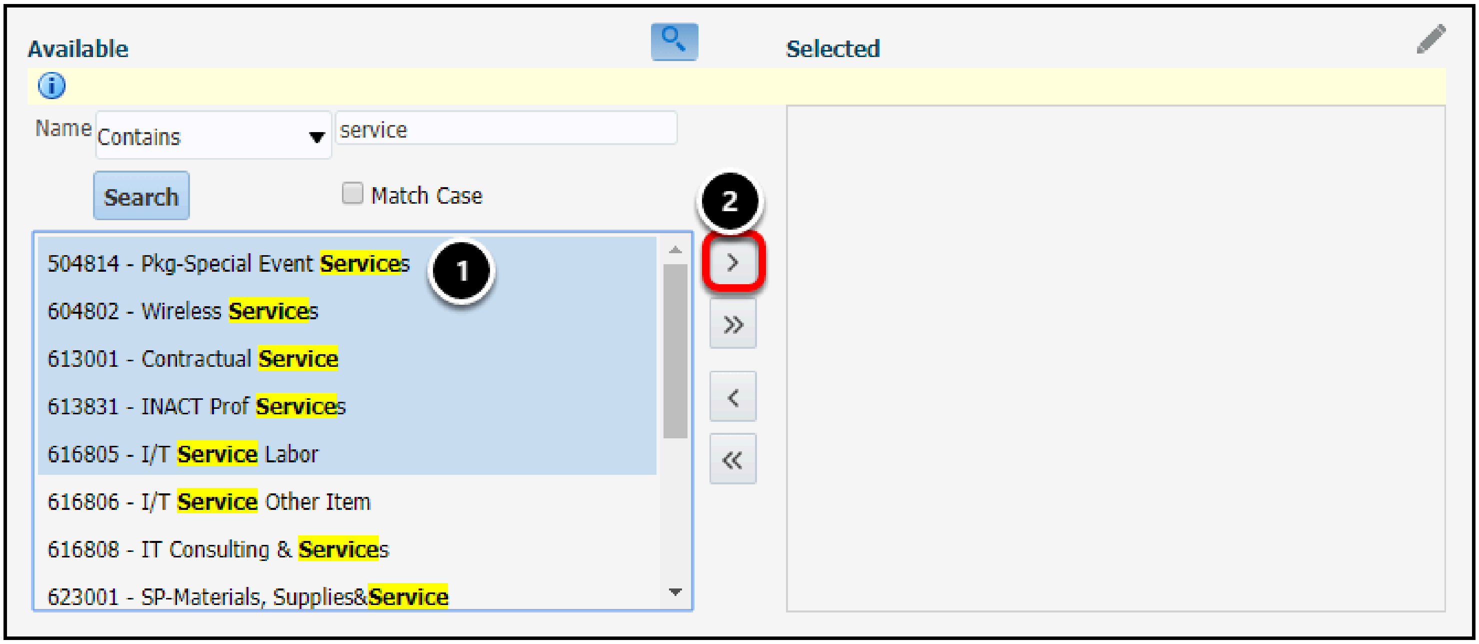


1. Click on a value on the left.
2. Click on the right arrow (Move) button.

3.2. The value now appears in the Selected section.

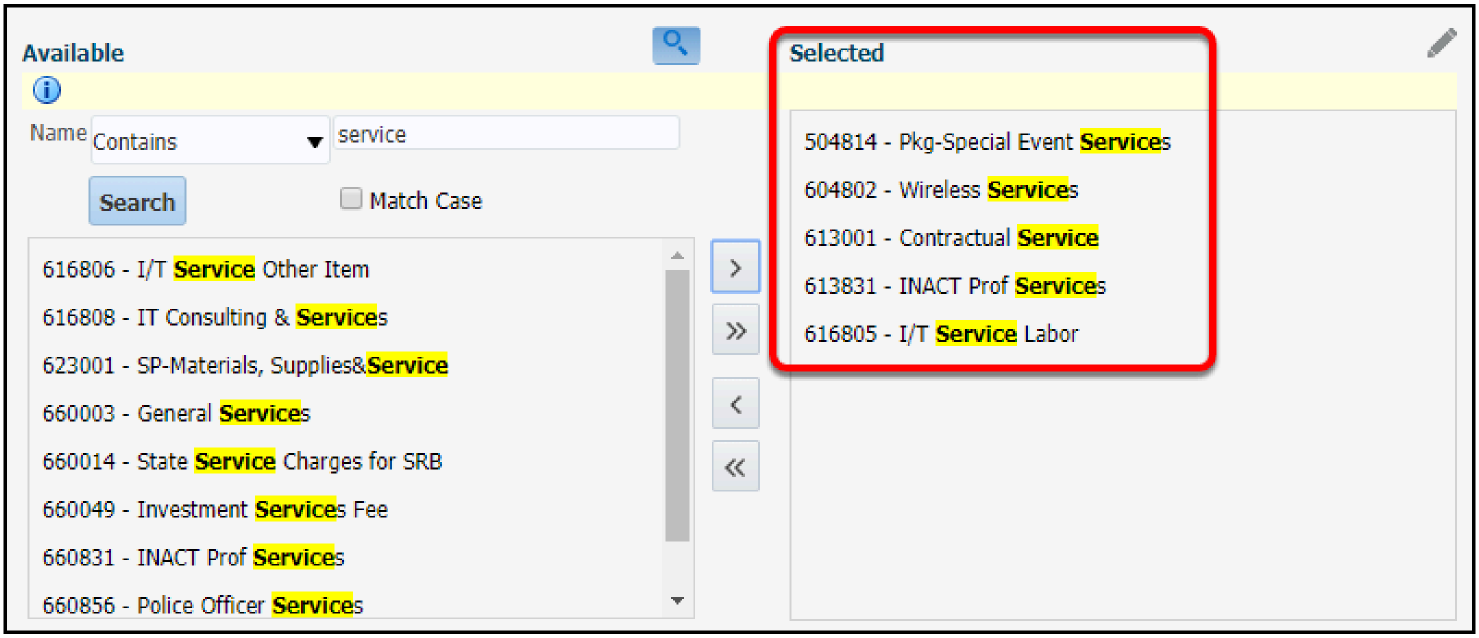


3.3. To select multiple consecutive values, hold down the Shift key as you click on the first value in the range. Continue to hold the Shift key as you click on the last value in the range. Then click on the Move arrow icon.

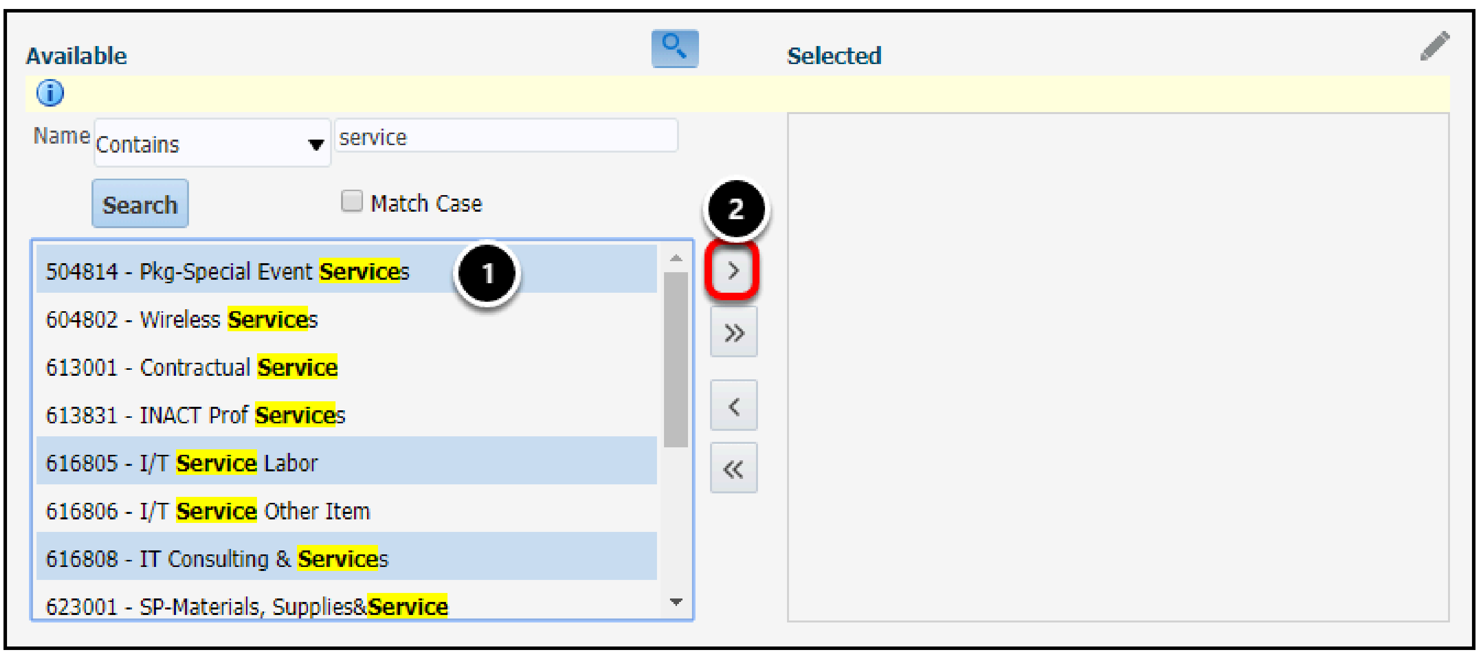


1. Hold down the Shift key as you select the first value in the range and continue holding down Shift as you click on the last value in the range.
2. Click on the right arrow (Move) button.

3.4. The values now appear in the Selected section.

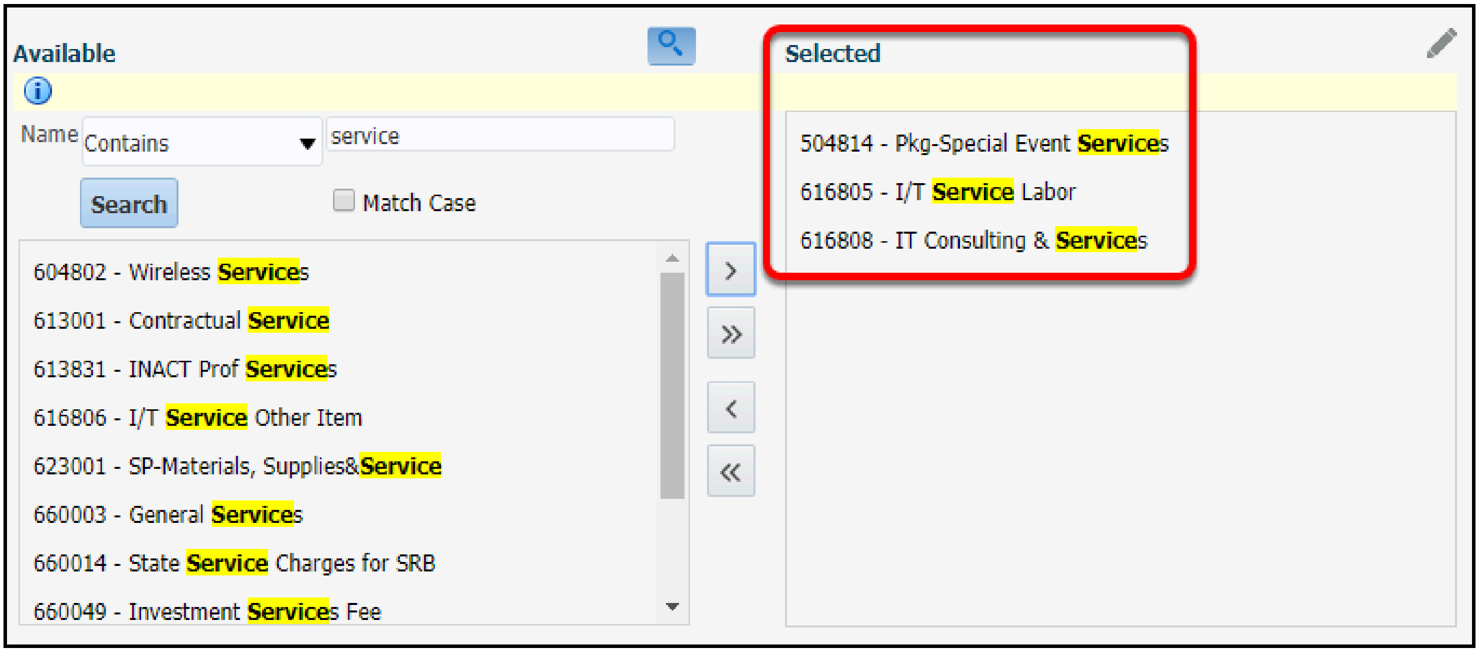


3.5. To select non-consecutive values, hold down the CTRL key (or the Command key if you are a Mac user) as you click on the first value. Continue to hold down the CTRL or Command key as you select each subsequent value. Then click on the Move arrow icon.

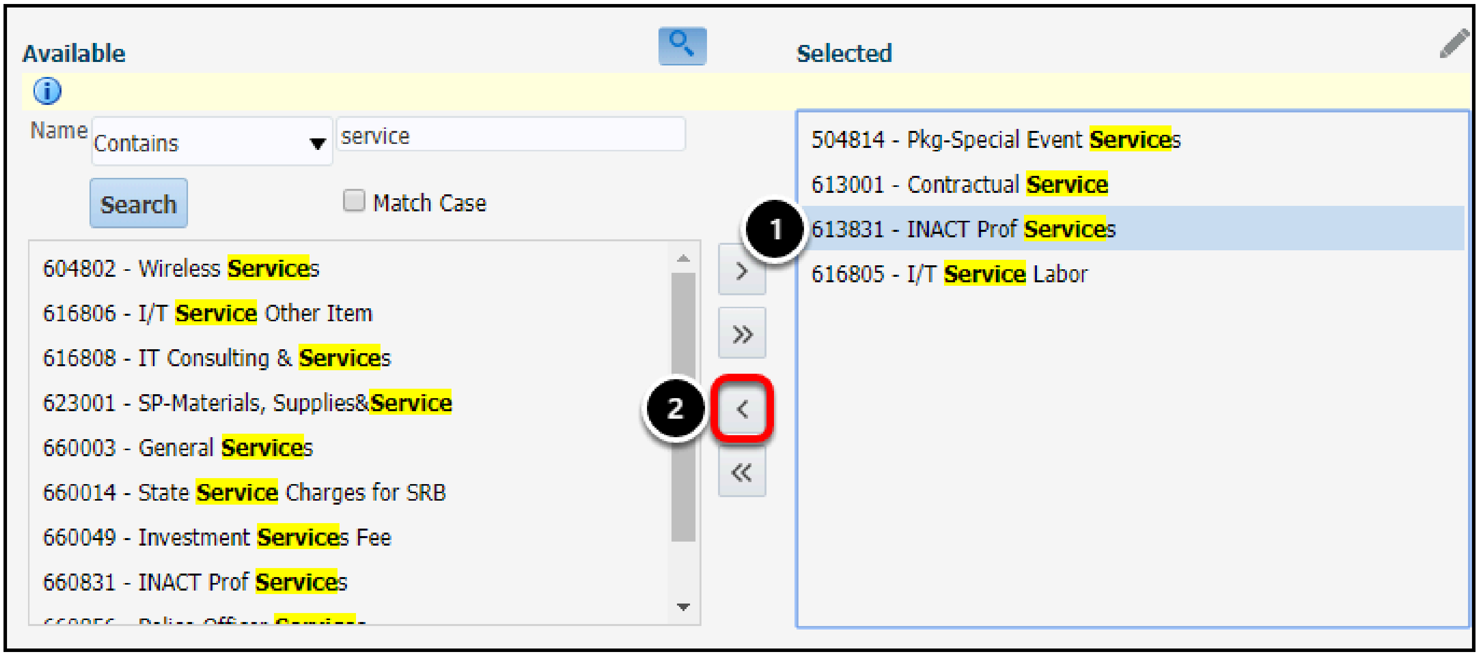


1. Hold down the CTRL (or Command) key as you select the first value and continue holding down CTRL/Command as you click as you select each subsequent value.
2. Click on the right arrow (Move) button.

3.6. The values now appear in the Selected section.

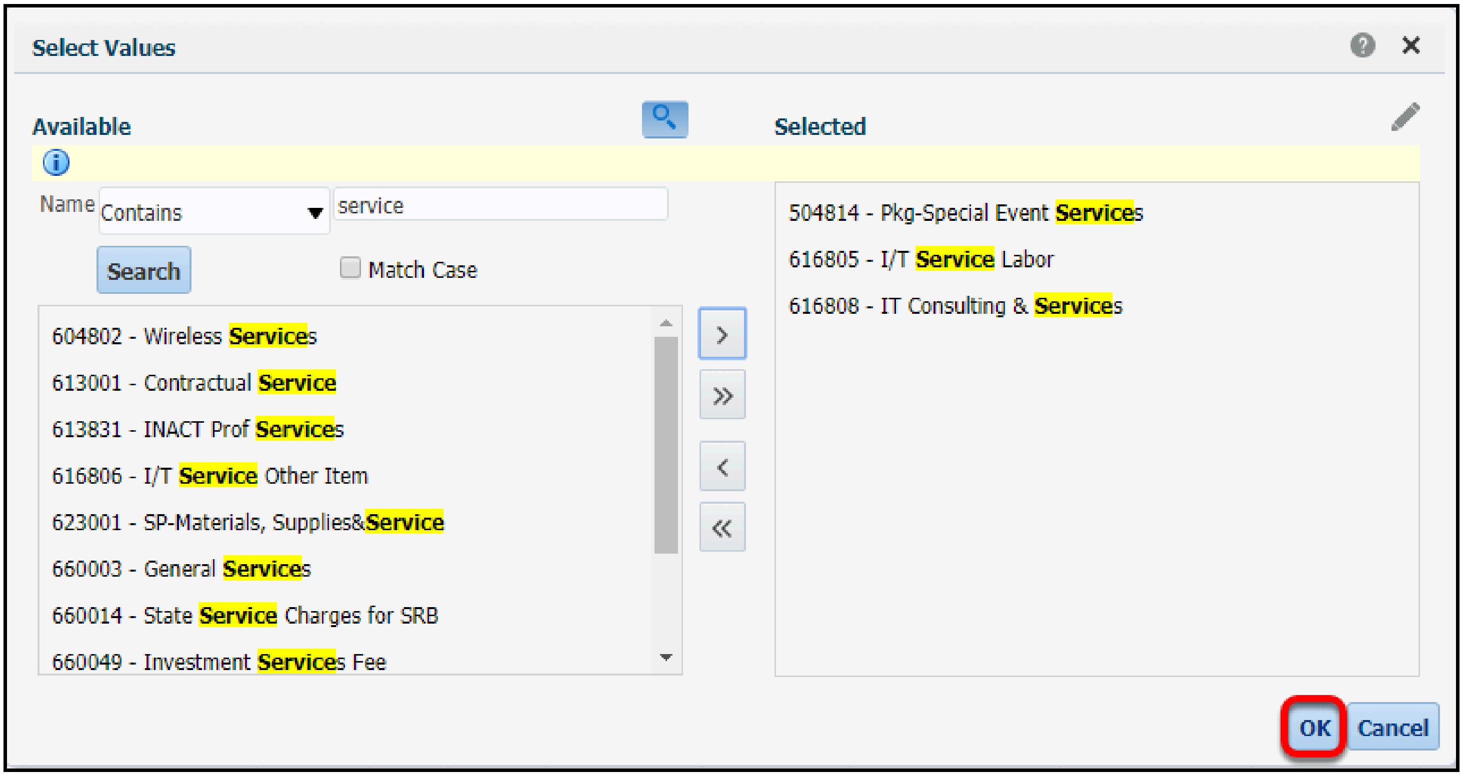


4. To remove one or more values, select the value(s) on the right. Then click on the Remove arrow button.



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.

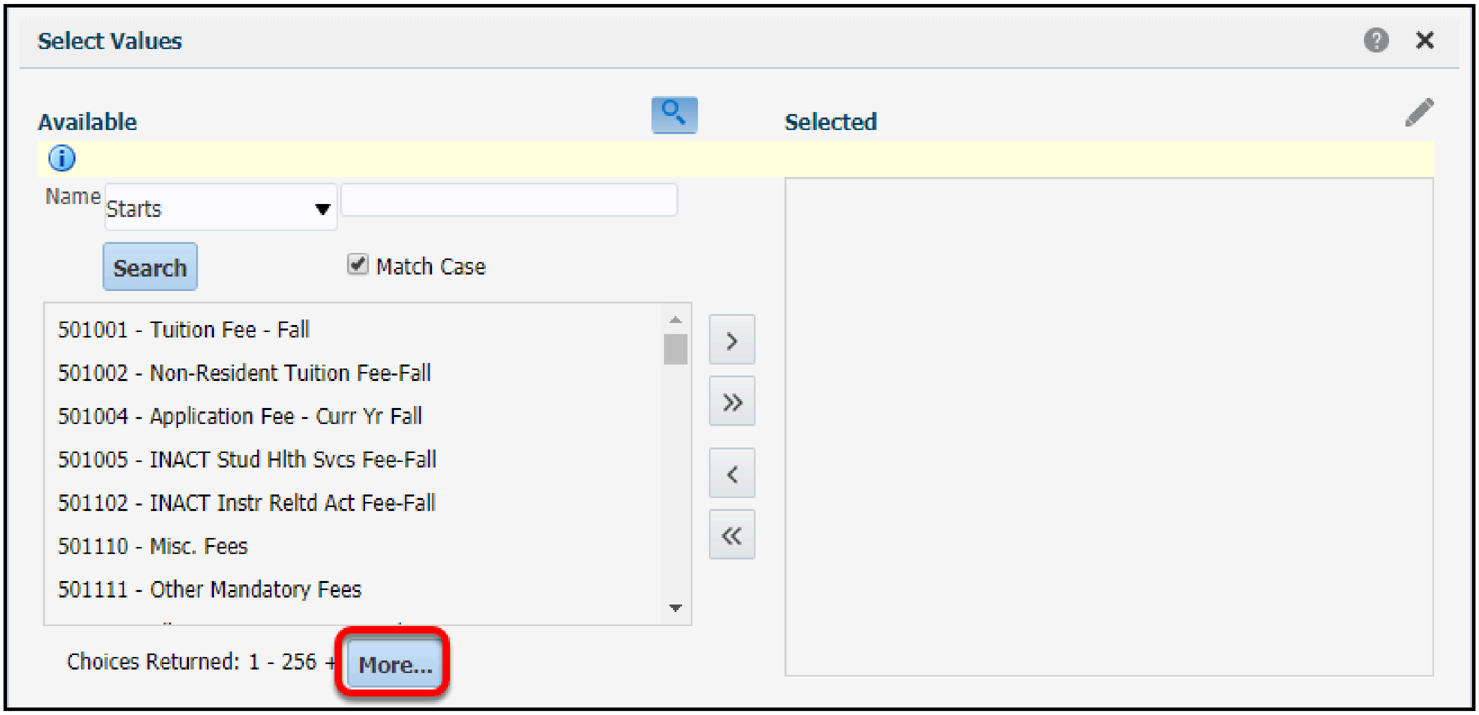
5. Once all of the values you want on your report appear in the Selected column, click OK.



Select All/Remove All Values

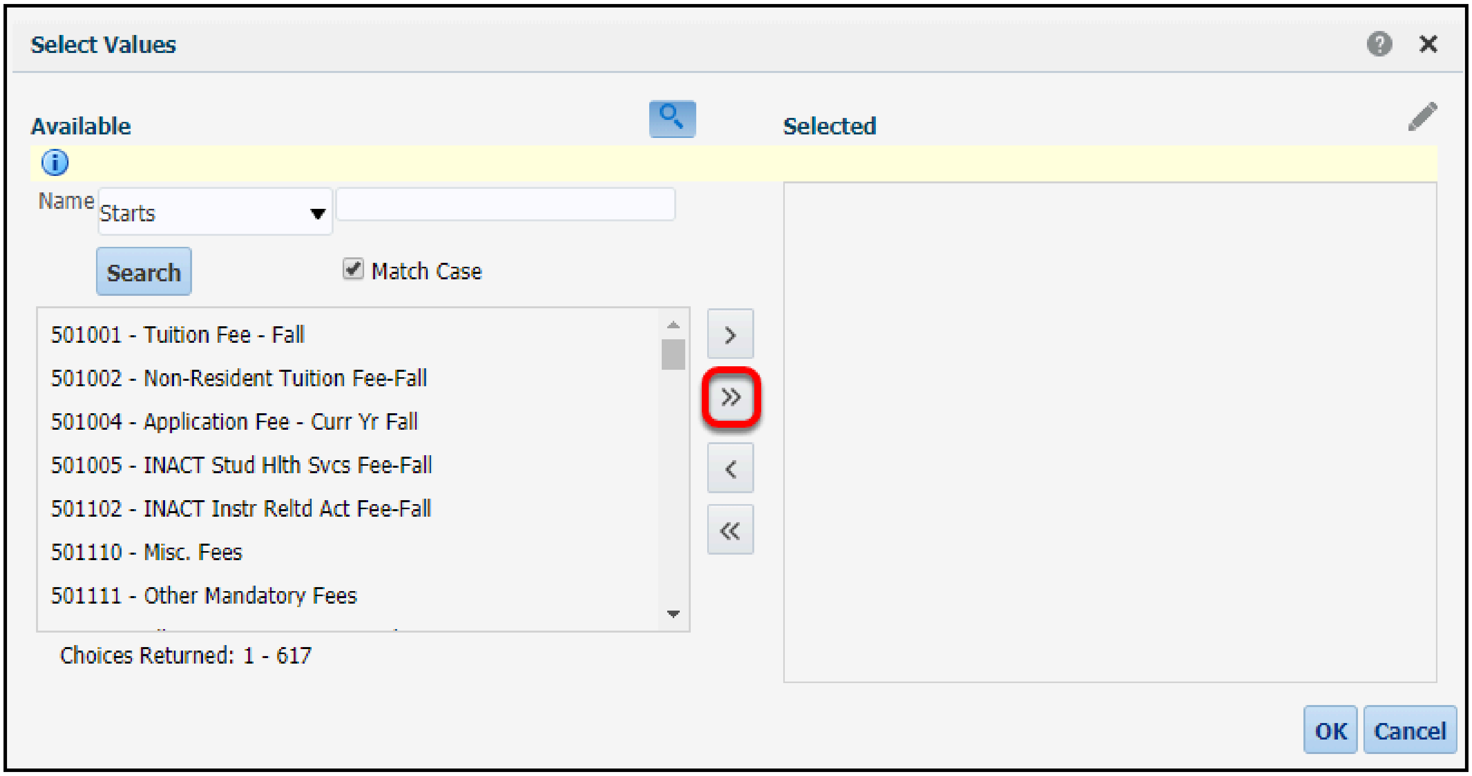
1. To Move All values, click on the More button until it disappears in order to view all available values.

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



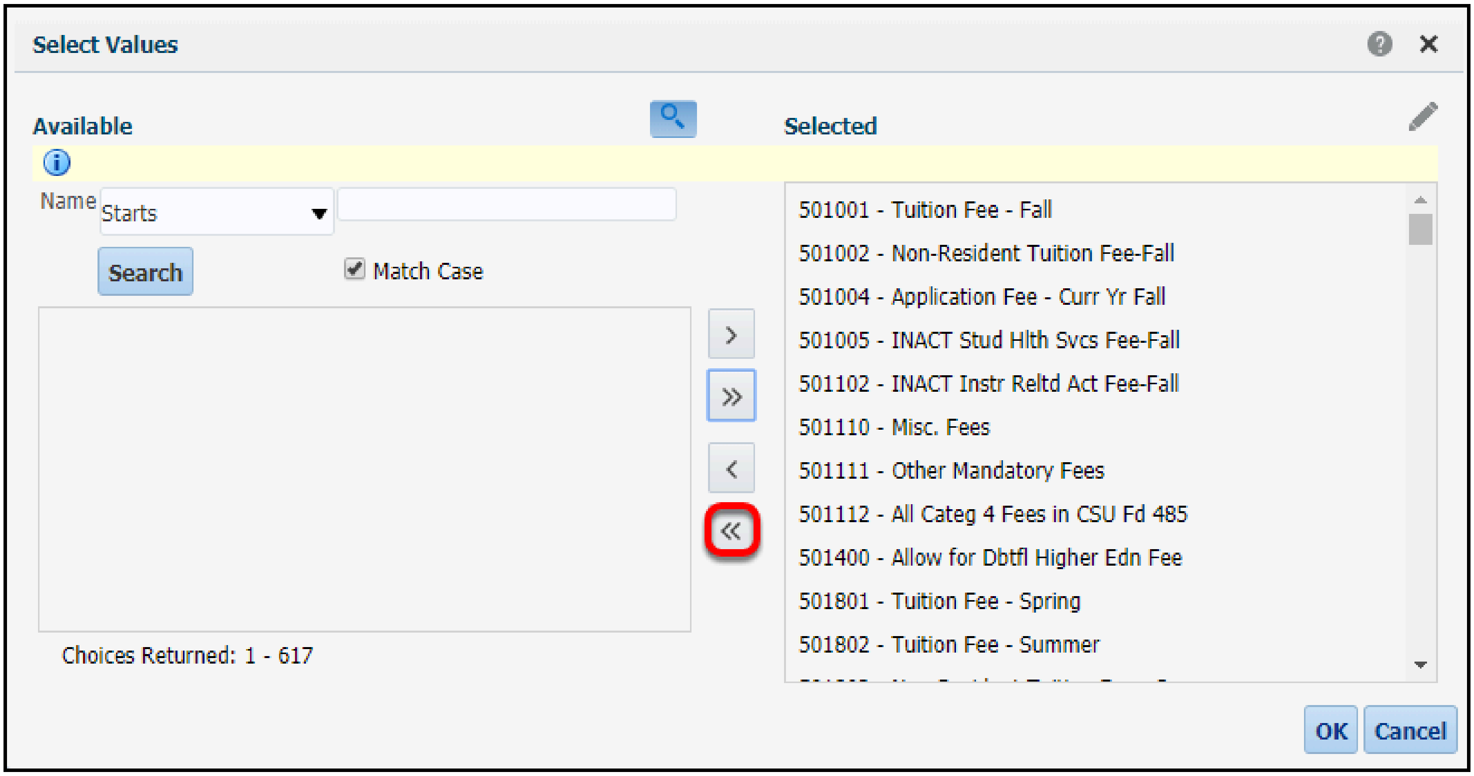
Before selecting all values, you will want to ensure that all the available values are showing. In the example above, you can see that the system is only showing the first 256 values and that more are available.

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

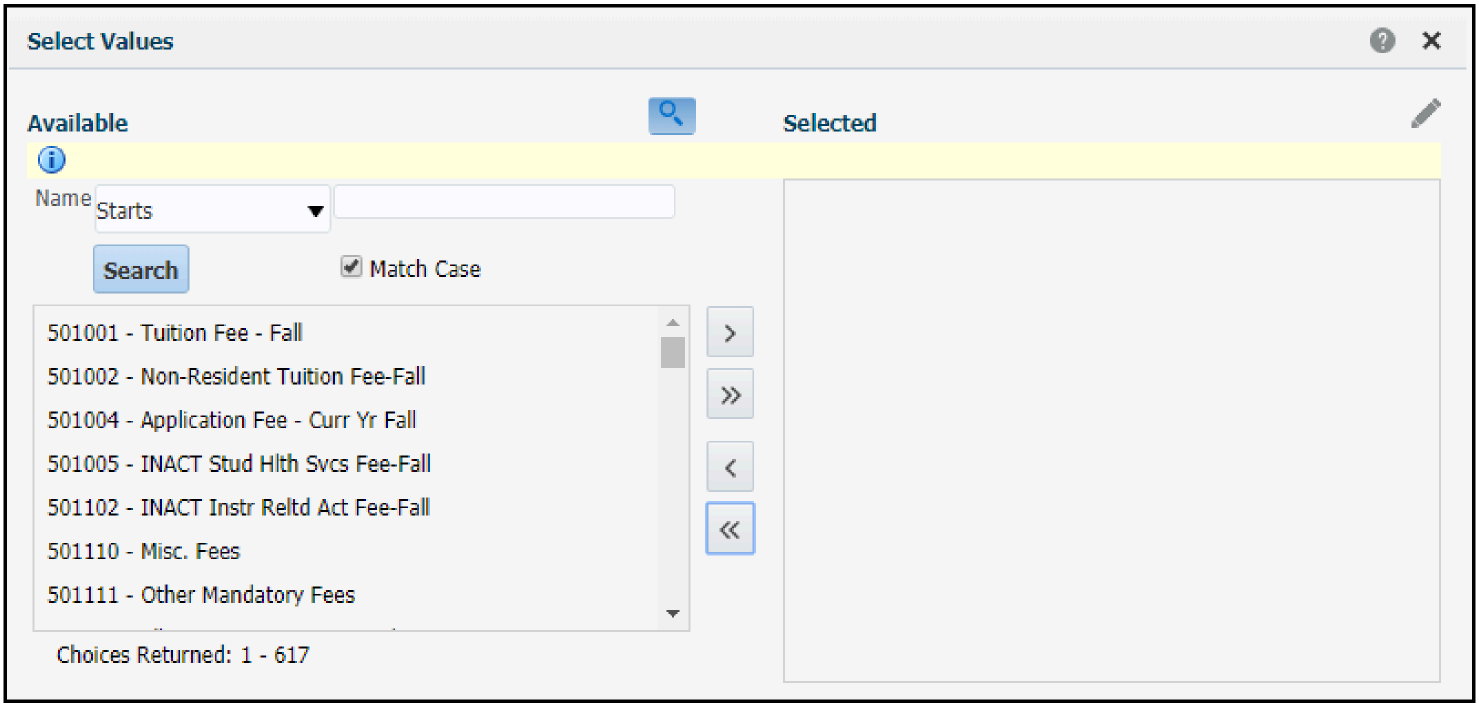


Once the More button disappears, you can now move all of the values to the Selected column.

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

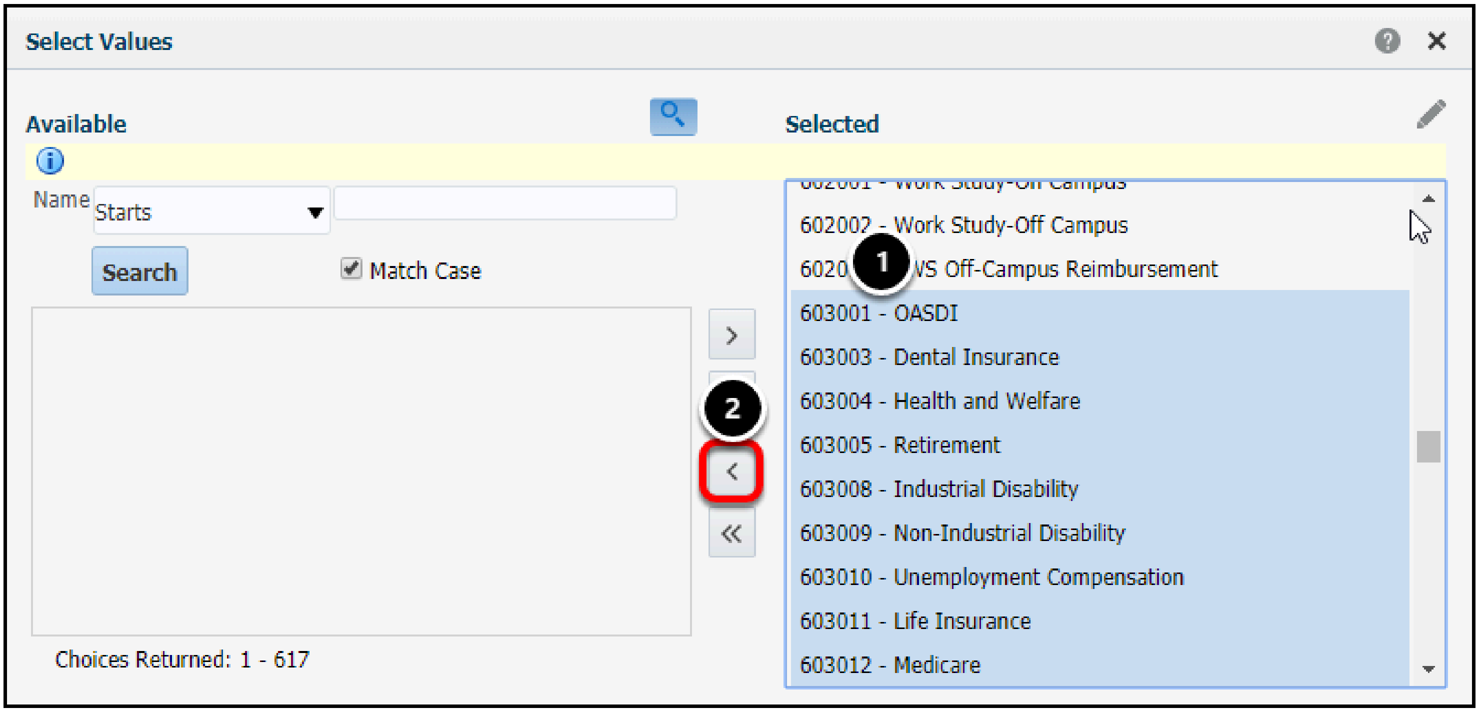


2.1. The Selected column is now empty.



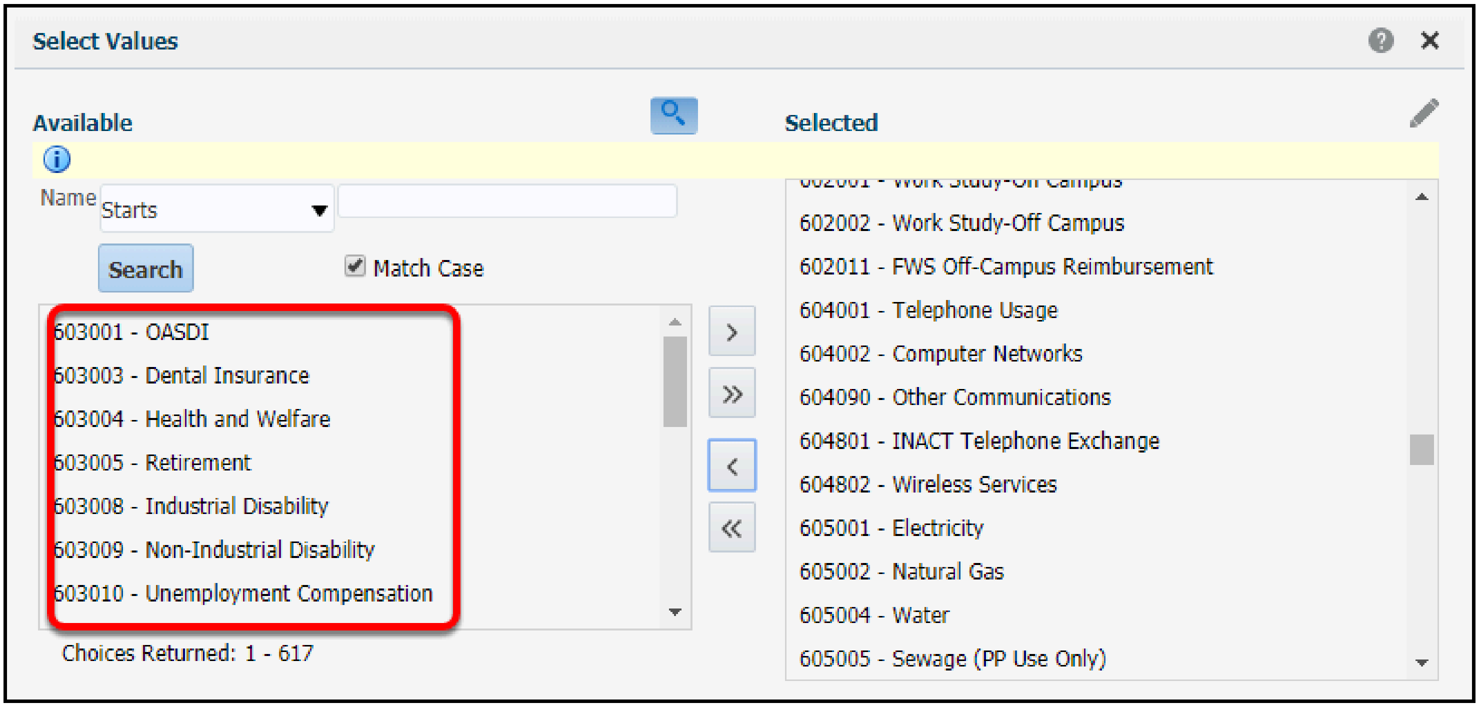
Removing Values from the Selected Column

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.

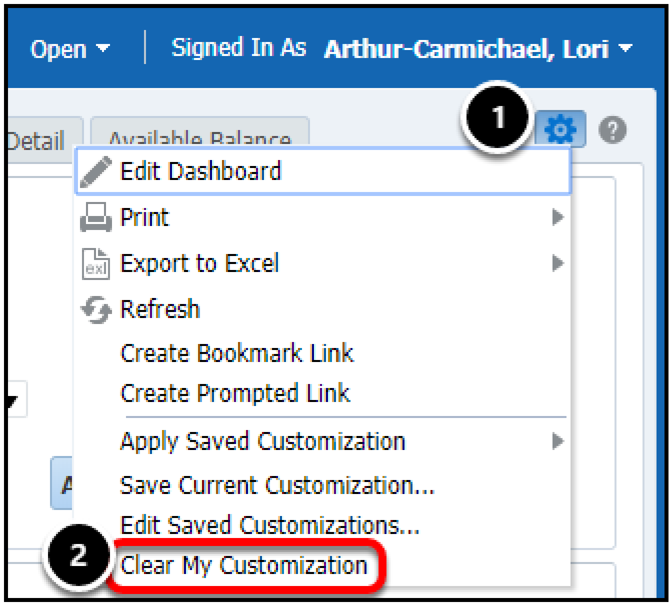


This type of selection allows you to exclude (or include) only specific values. In the example above, this filter will exclude all of the benefits account codes but include all other account codes (if there are transactions for them).

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.

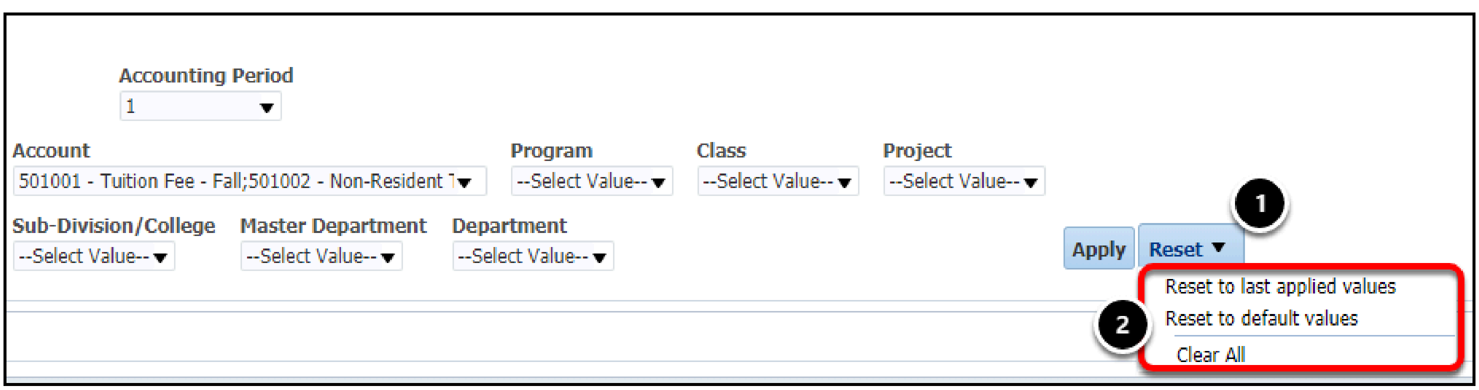
1. Click on Page Options at the top right of the page. Then select Clear My Customization.



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 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 or 657-278-5647.