

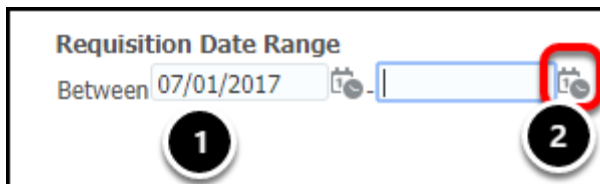
Working with Filters

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.

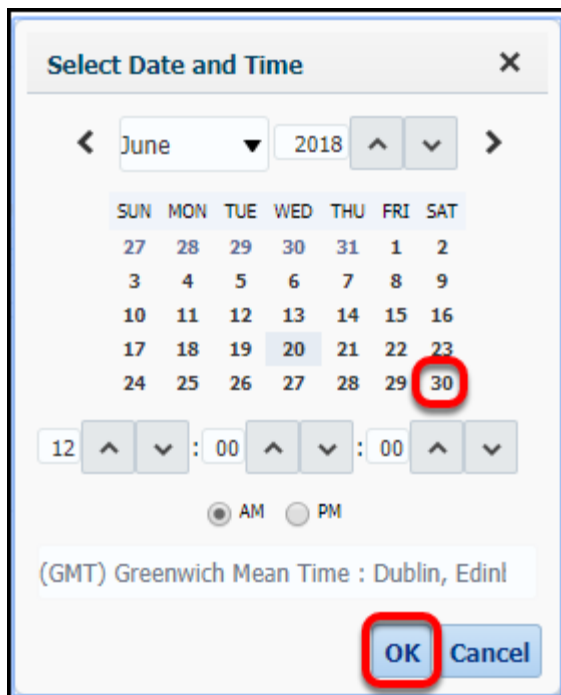
1. You can type in a date or click on the calendar icon to select a date.



The screenshot shows a filter interface titled "Requisition Date Range". It includes a "Between" label, a text input field containing "07/01/2017", and a calendar icon. A red circle highlights the calendar icon, and a blue circle highlights the text input field. Below the input field is a circular button with the number "1", and below the calendar icon is a circular button with the number "2".

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.



Select Date and Time [X]

< June 2018 >

SUN	MON	TUE	WED	THU	FRI	SAT
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

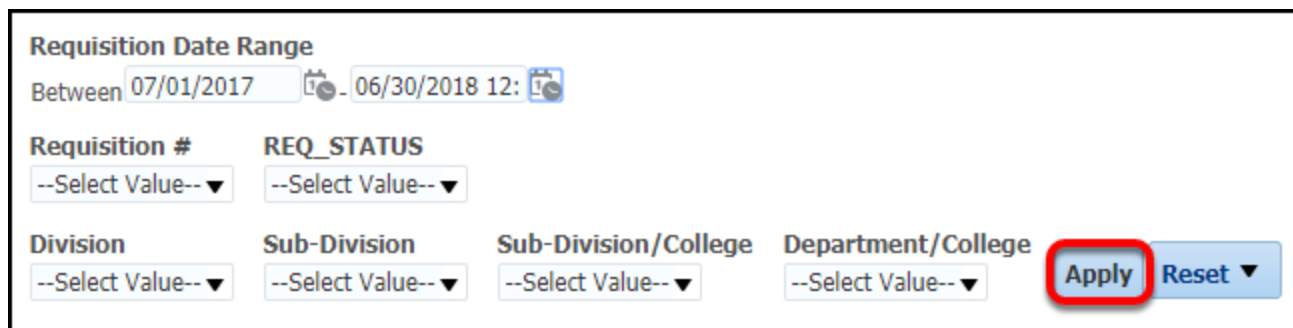
12 : 00 : 00

☒ AM ☐ PM

(GMT) Greenwich Mean Time : Dublin, Edinl

OK Cancel

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



Requisition Date Range

Between 07/01/2017 - 06/30/2018 12:

Requisition # --Select Value-- ▼ **REQ_STATUS** --Select Value-- ▼

Division --Select Value-- ▼ **Sub-Division** --Select Value-- ▼ **Sub-Division/College** --Select Value-- ▼ **Department/College** --Select Value-- ▼

Apply Reset ▼

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.

The screenshot shows a filter interface with the following fields:

- 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-- (highlighted with a red box)

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

The left screenshot shows the 'Department' menu open with the following options:

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

The right screenshot shows the 'Fiscal Year' menu open with the following options:

- ☒ 2018
- ☐ 2017
- ☐ 2016
- ☐ 2015

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.

The screenshot shows the filter interface with the following fields:

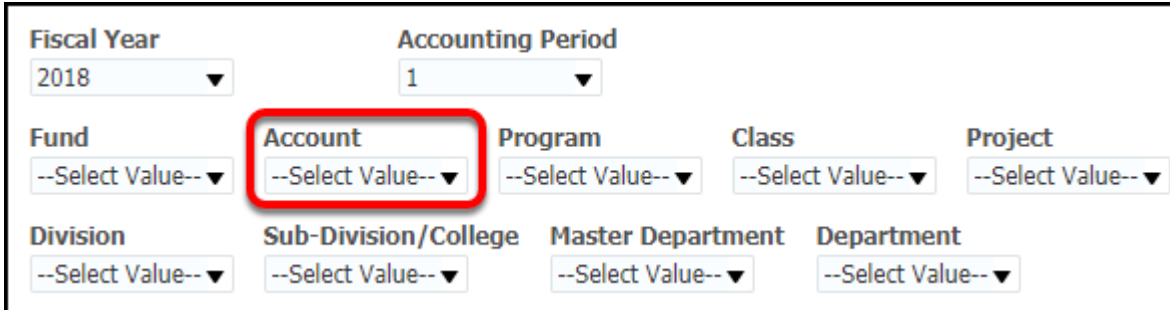
- Fiscal Year:** 2018
- Accounting Period:** 1
- Fund:** --Select Value--
- Account:** --Select Value--
- Program:** --Select Value--
- Class:** --Select Value--
- Project:** --Select Value--
- Division:** --Select Value--
- Sub-Division/College:** --Select Value--
- Master Department:** --Select Value--
- Department:** 10002 - Academic Advisement Center;10003 - A

The **Apply** button is highlighted with a red box.

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.

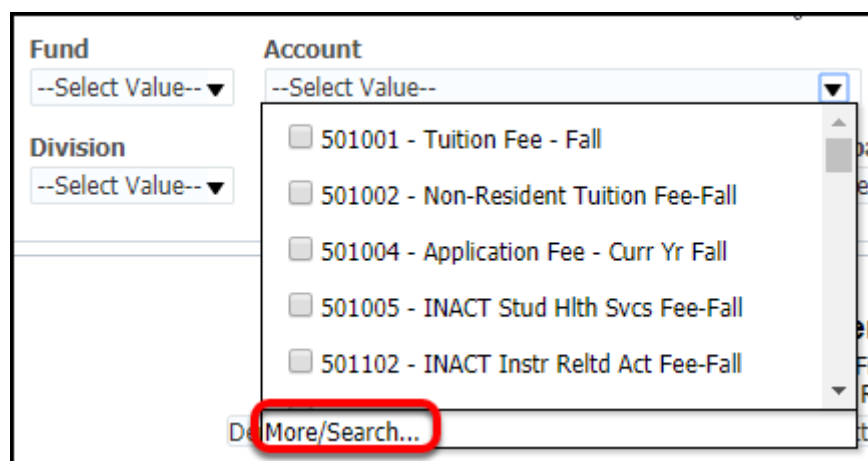
1. Click on a drop-down menu.



A screenshot of a web application's filter selection interface. It features several dropdown menus for filtering data. The 'Account' dropdown menu is highlighted with a red rectangle. The other dropdowns include 'Fiscal Year' (set to 2018), 'Accounting Period' (set to 1), 'Fund', 'Program', 'Class', 'Project', 'Division', 'Sub-Division/College', 'Master Department', and 'Department'. All dropdowns currently show '--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."

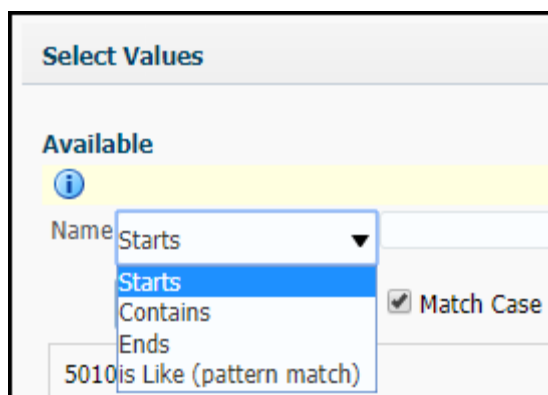


A screenshot showing the 'Account' dropdown menu open. The menu displays a list of fee categories, each with a checkbox: '501001 - Tuition Fee - Fall', '501002 - Non-Resident Tuition Fee-Fall', '501004 - Application Fee - Curr Yr Fall', '501005 - INACT Stud Hlth Svcs Fee-Fall', and '501102 - INACT Instr Reltd Act Fee-Fall'. At the bottom of the dropdown list, the 'More/Search...' button is highlighted with a red rectangle. Other filter dropdowns like 'Fund' and 'Division' are visible in the background.

Searching for Values

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

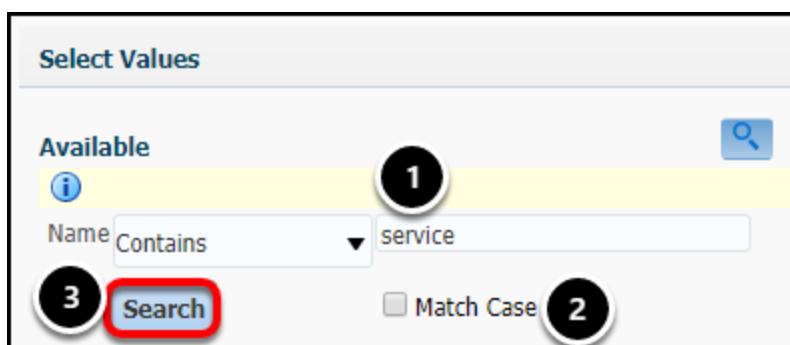
1. To search for a value, first choose the type of search you wish to use.



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.)

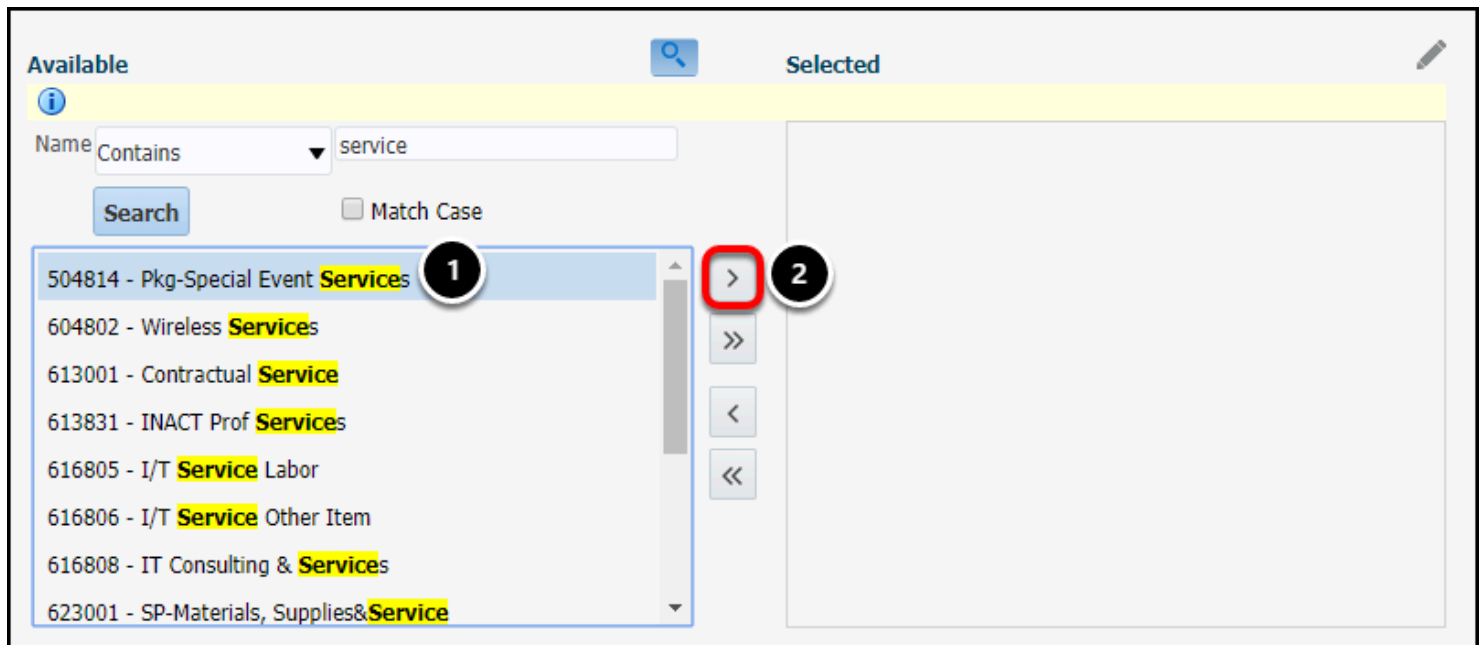
3. Click **Search**.

3. A list of search results appears.

The screenshot shows a 'Select Values' dialog box with a search interface. The 'Available' list on the left contains several items with the word 'Service' or 'Services' highlighted in yellow. The 'Selected' list on the right is currently empty. Navigation buttons between the lists are visible. The search criteria are set to 'Name Contains service'.

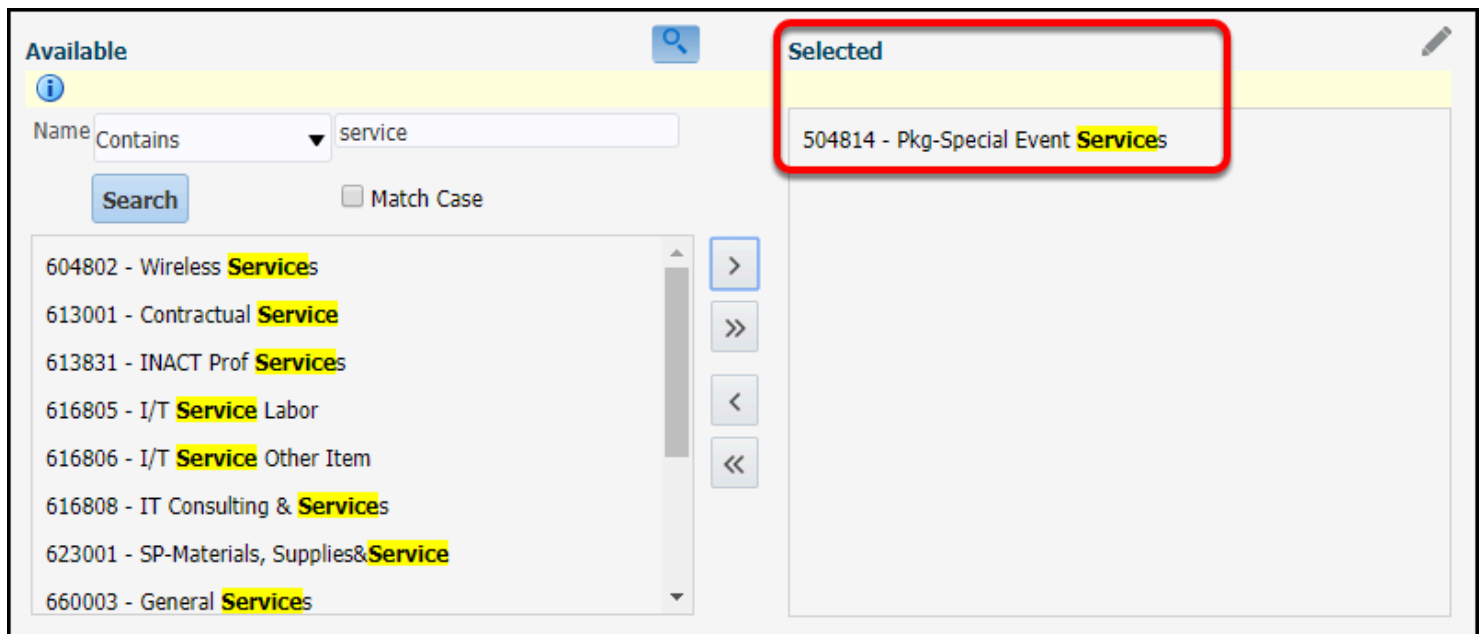
Available	Selected
504814 - Pkg-Special Event Services	
604802 - Wireless Services	
613001 - Contractual Service	
613831 - INACT Prof Services	
616805 - I/T Service Labor	
616806 - I/T Service Other Item	
616808 - IT Consulting & Services	
623001 - SP-Materials, Supplies& Service	

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

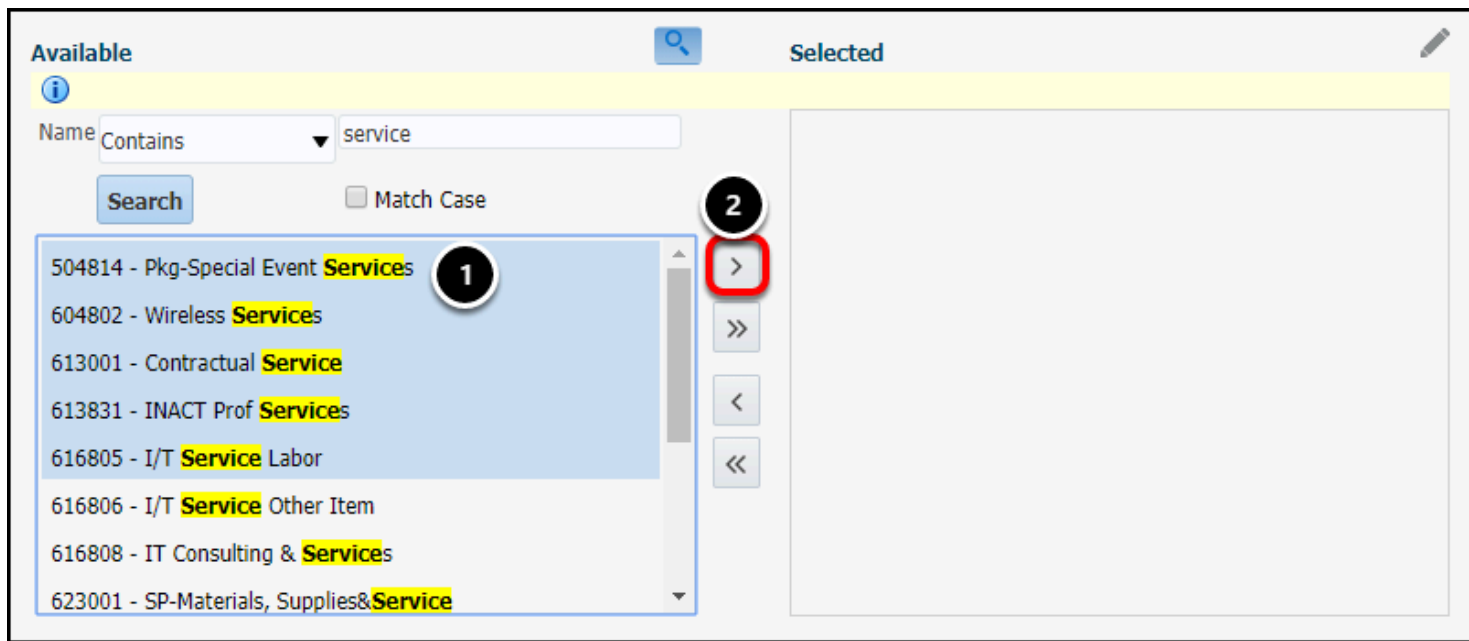


1. Click on a value on the left.
2. Click on the right arrow (Move) button.

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.

Available

Name: Contains service

Search Match Case

- 616806 - I/T Service Other Item
- 616808 - IT Consulting & Services
- 623001 - SP-Materials, Supplies&Service
- 660003 - General Services
- 660014 - State Service Charges for SRB
- 660049 - Investment Services Fee
- 660831 - INACT Prof Services
- 660856 - Police Officer Services

Selected

- 504814 - Pkg-Special Event Services
- 604802 - Wireless Services
- 613001 - Contractual Service
- 613831 - INACT Prof Services
- 616805 - I/T Service Labor

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.

Available

Name: Contains service

Search Match Case

- 504814 - Pkg-Special Event Services
- 604802 - Wireless Services
- 613001 - Contractual Service
- 613831 - INACT Prof Services
- 616805 - I/T Service Labor
- 616806 - I/T Service Other Item
- 616808 - IT Consulting & Services
- 623001 - SP-Materials, Supplies&Service

Selected

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 shows a software interface with two main sections: 'Available' and 'Selected'. The 'Available' section has a search bar with the text 'service' and a 'Search' button. Below the search bar is a list of items, each with a number and a description. The 'Selected' section is highlighted with a red box and contains three items that have been moved from the 'Available' section.

Available	Selected
604802 - Wireless Services	504814 - Pkg-Special Event Services
613001 - Contractual Service	616805 - I/T Service Labor
613831 - INACT Prof Services	616808 - IT Consulting & Services
616806 - I/T Service Other Item	
623001 - SP-Materials, Supplies& Service	
660003 - General Services	
660014 - State Service Charges for SRB	
660049 - Investment Services Fee	

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

The screenshot shows a software interface with two main panels: 'Available' on the left and 'Selected' on the right. At the top of the 'Available' panel, there is a search bar with a dropdown menu set to 'Contains' and a text input field containing 'service'. Below the search bar is a 'Search' button and a 'Match Case' checkbox. The 'Available' list contains several items, each with a number and a description, such as '604802 - Wireless Services' and '616806 - I/T Service Other Item'. The 'Selected' panel shows a list of items that have been moved from the 'Available' list, including '504814 - Pkg-Special Event Services', '613001 - Contractual Service', '613831 - INACT Prof Services' (which is highlighted with a blue background), and '616805 - I/T Service Labor'. Between the two panels are four arrow buttons: a single right arrow (>), a double right arrow (>>), a single left arrow (<), and a double left arrow (<<). A red square highlights the single left arrow button, and a black circle with the number '1' highlights the selected item in the 'Selected' list. A black circle with the number '2' highlights the single left 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 Values

Available

Name Contains service

☐ Match Case

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

660049 - Investment **Services** Fee

Selected

504814 - Pkg-Special Event **Services**

616805 - I/T **Service** Labor

616808 - IT Consulting & **Services**

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.

Select Values

Available **Selected**

Name: Starts

☒ 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

Choices Returned: 1 - 256 + **More...**

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.

Select Values

Available **Selected**

Name: Starts

☒ 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

Choices Returned: 1 - 617

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.

Select Values

Available

Name

Starts

Search

Match Case

>

>>

<

<<

Choices Returned: 1 - 617

Selected

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

OK

Cancel

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.

The screenshot shows a 'Select Values' dialog box with two main sections: 'Available' on the left and 'Selected' on the right. The 'Available' section has a search bar with 'Name' and 'Starts' dropdowns, a 'Search' button, and a 'Match Case' checkbox. The 'Selected' section displays a list of values, including '602001 - Work Study-On Campus', '602002 - Work Study-Off Campus', '602003 - WS Off-Campus Reimbursement', '603001 - OASDI', '603003 - Dental Insurance', '603004 - Health and Welfare', '603005 - Retirement', '603008 - Industrial Disability', '603009 - Non-Industrial Disability', '603010 - Unemployment Compensation', '603011 - Life Insurance', and '603012 - Medicare'. A red circle highlights the left arrow button (Remove) between the columns. A black circle with the number '1' is placed over the '602003 - WS Off-Campus Reimbursement' value in the 'Selected' column. A black circle with the number '2' is placed over the left arrow button. The 'Choices Returned: 1 - 617' text is visible at the bottom left.

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.

Select Values

Available **Selected**

Name Starts ☒ Match Case

603001 - OASDI
603003 - Dental Insurance
603004 - Health and Welfare
603005 - Retirement
603008 - Industrial Disability
603009 - Non-Industrial Disability
603010 - Unemployment Compensation

Choices Returned: 1 - 617

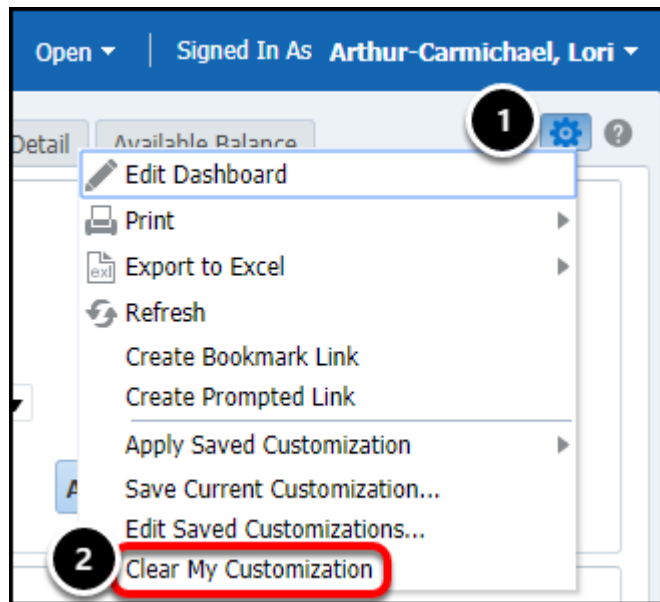
602001 - Work Study-On Campus
602002 - Work Study-Off Campus
602011 - FWS Off-Campus Reimbursement
604001 - Telephone Usage
604002 - Computer Networks
604090 - Other Communications
604801 - INACT Telephone Exchange
604802 - Wireless Services
605001 - Electricity
605002 - Natural Gas
605004 - Water
605005 - Sewage (PP Use Only)

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.

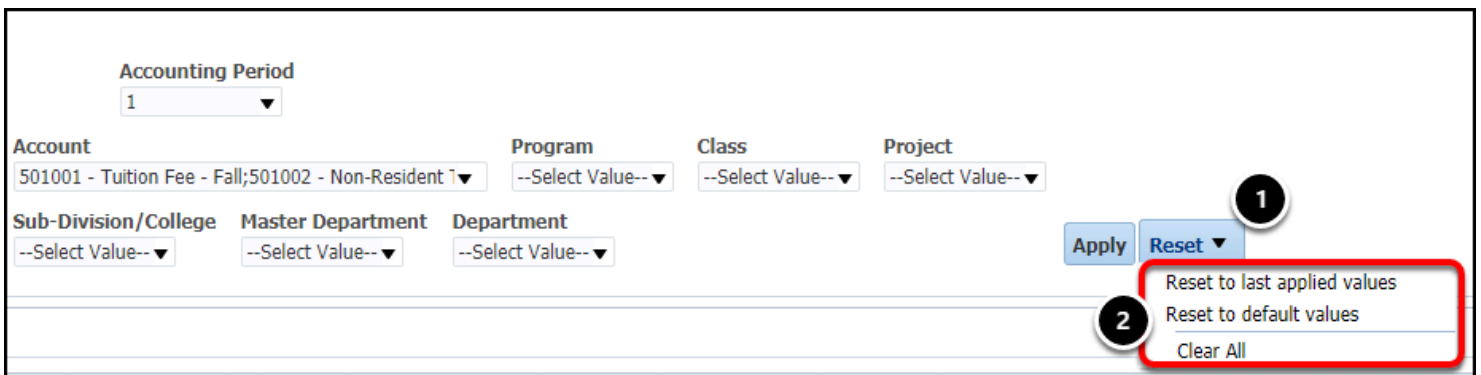
1. Click on **Page Options** at the top right of the page. Then select **Clear My Customization**.



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.