Using Additional Data Filters

Additional filter buttons allow you to work with a designated subset of loaded data.

Using a filter basically “re-loads” the data based on the filter chosen and allows you to apply planning functions like the Inflate function to a subset of the data versus ALL loaded data for a BFR Code or Package.

A few examples are as follows:

- Fund Filter = available in all layouts, this filter allows you to “re-load” or filter the data from an entire BFR Code/Package with many fund codes/cost object to one single fund without exiting a layout. Then a function like Inflate will only apply to that Fund.

- PSA Quick Filters and PSA Filter = available in the Budget Development Position layouts, these filters allow you to “re-load” the data for an entire BFR code/Package based on positions. PSA Quick Filter narrows data from all the positions to just positions for Biweekly, Staff, or Faculty. The PSA Filter button allows you to filter to more specific Personnel Sub-areas, like Faculty, Regular Rank or Faculty, Tenured.

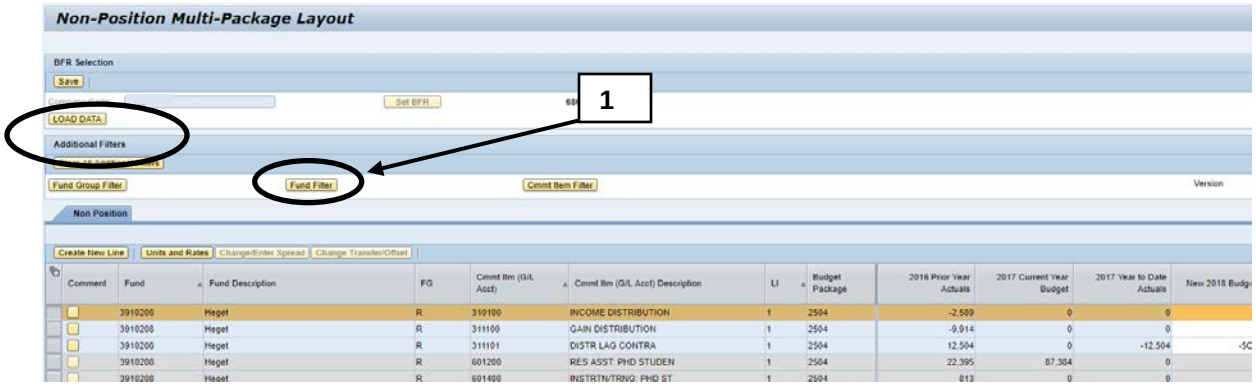
While the Additional Filter buttons vary by the type of layout there are different choices for Budget Development Position and Non-Position layouts, the basic steps to use the buttons are the same.

Refer to the specific guides for Budget Development, Budget Modifications and Projections for the additional filters available in those respective layouts. The general steps are outlined in this section of the guide.

Additional Filters (cont.)

General Steps

Note: The Fund Filter is the example used for general steps as that filter is available across layouts.

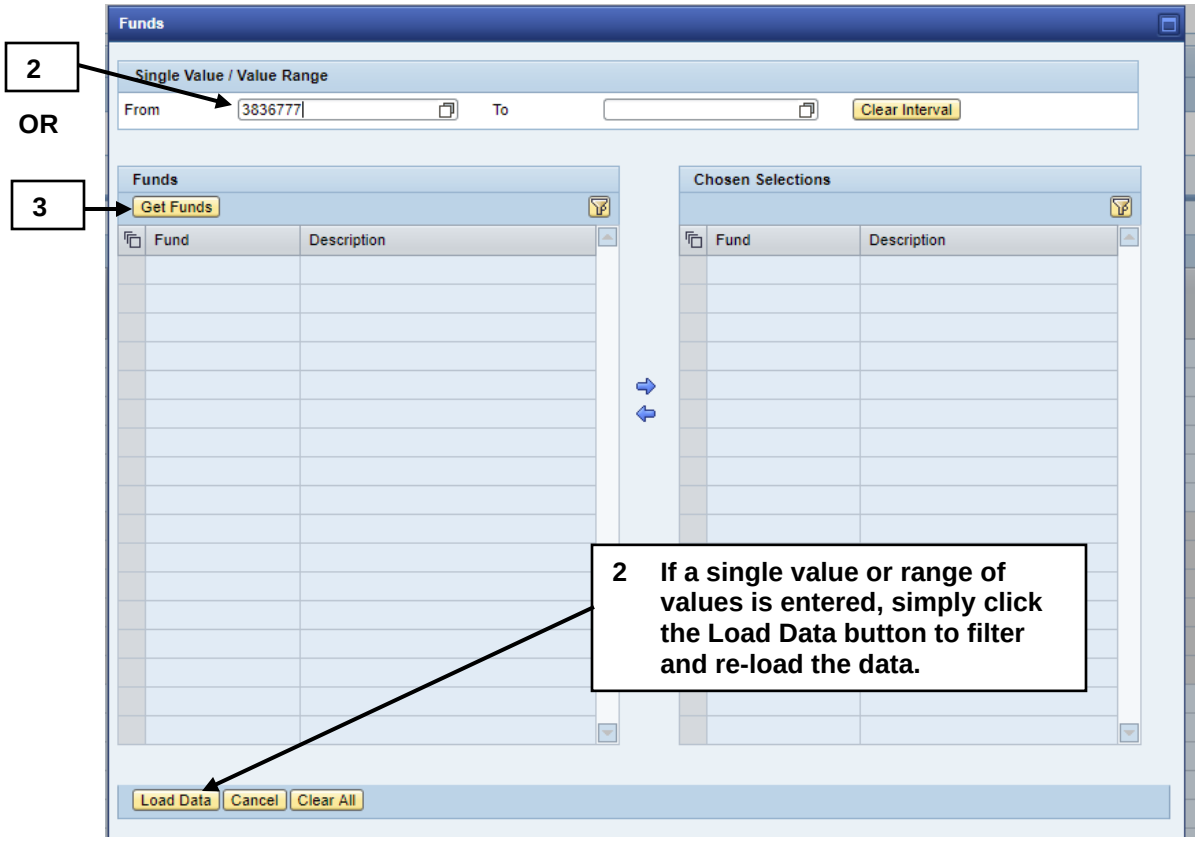


1. To filter and re-load data, click on one of the filter buttons under **Additional Filters** per the options available on each type of layout:

Filter Type	Use
The following filters are available on ALL layouts: Budget Modifications, Projections, Budget Development: Non-Position & Position	
Fund	Filters data by a specific 7 digit fund (cost object) or multiple funds
Fund Group	Filters data by fund group or multiple groups (example U = Unrestricted, A = Allocated, R = Restricted)
Commitment Item (G/L Account)	Filters data by a specific 6 digit G/L Account, multiple G/L Accounts, or G/L Account Groups
The following filters are available on Budget Development: Position Only	
Provisions	Available on Funded view, filters data to lines with funding of Provisions (supplements, etc.) that are indicated with X in Provision column.
PSA Quick Filters	Check boxes allow quick filter of funded or owned data from ALL employees to Personnel Sub-areas of Faculty, Staff, and/or Biweekly
PSA Filter - Funded or Owned	Filters data to a specific Personnel Sub-area like Faculty Regular Rank, Faculty Tenured, etc. (available on Funded and Owned view)
Position Filter Funded or Owned	Filters data to a specific Position (available on Funded and Owned view)

Additional Filters (cont.)

In the resulting window (title varies by filter; Funds in this example):

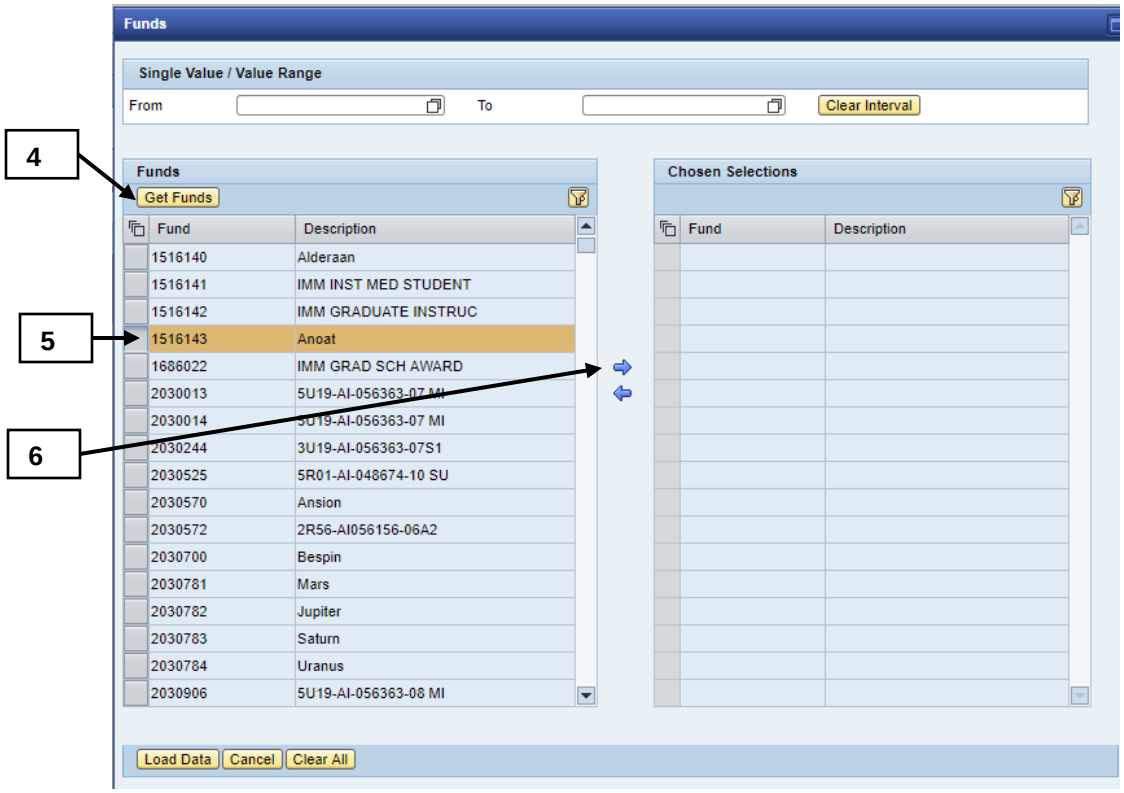


2. Enter a single value or range of values if known (a **7 digit Fund/**cost object in this example) and click on the **Load Data** button.

   <u>OR</u>

3. To view a list of all the values (Funds/cost object in this example) included in all loaded data, use the **Get (name varies) button** (the **Get Fund** button is used in this example**)** and follow the next steps.

Additional Filters (cont.)

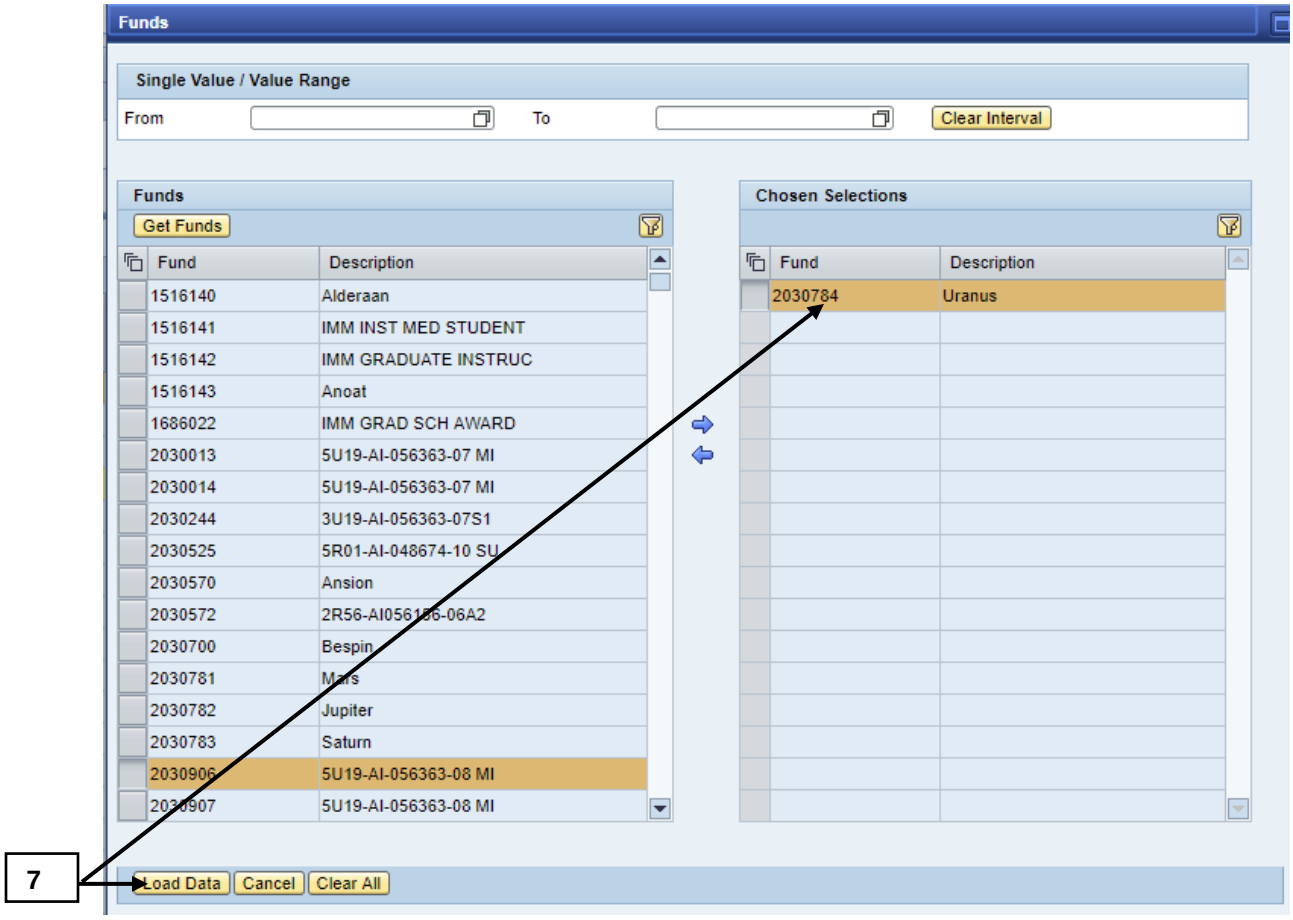


4. Once the **Get Funds** (or other) button is used, **review the populated data on the left side of the window** for all the selected values available for the loaded data (Funds/cost objects in this example).

5. **Select one or more values from the left side** by clicking on the box to the left of the value and highlighting that row in gold.

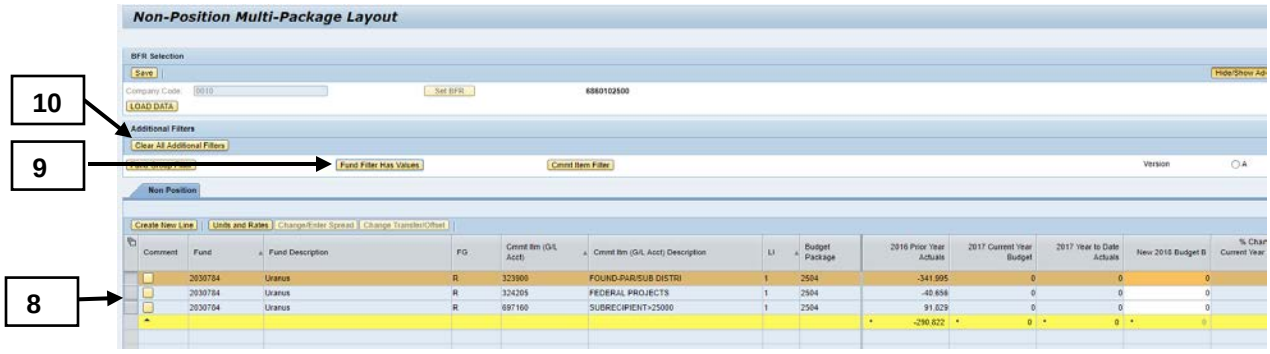
6. Once one or more items are selected, click on the **Add** button **to move to the right side** under *Chosen Selections*.

Additional Filters (cont.)



7. Once data is listed under Chosen Selections, click the **Load Data** button to re-load the data from all data selected to the filtered data chosen.

Additional Filters (cont.)



8. Review the filtered data that is now loaded in the layout for just the values selected.

   Note: Remember that functions like Inflate will apply ONLY to the re-loaded filtered data at this point.

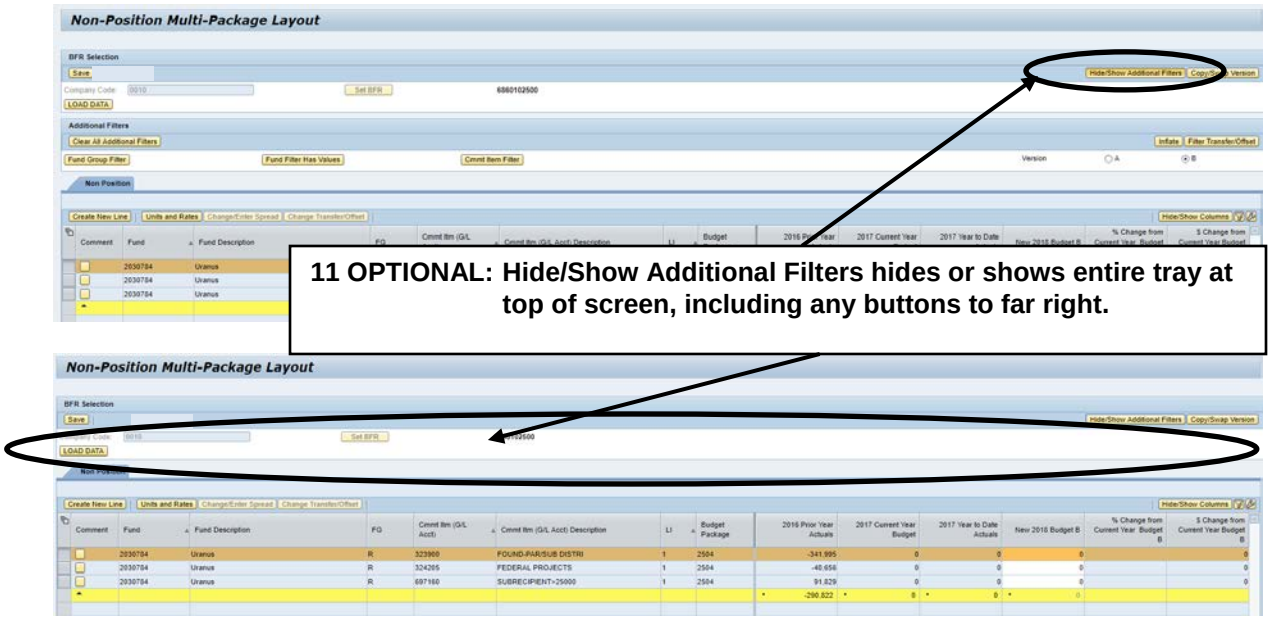
9. Notice the button now displays as **Fund Filter Has Values** to indicate that you used this additional filter and there are filtered values (name of button varies by filter).

10. To clear the filters, use one of these options:

    - **Clear All Additional Filters** to remove filters and re-load ALL data as needed.
    - If multiple filters are used and you do not wish to clear all filters, simply repeat the steps above and remove any values for a specific filter and Load Data to reset one filter.

      Note: Once filters are removed, any action taken to "Loaded Data" will overwrite actions while data was filtered.

Additional Filters (cont.)



11. OPTIONAL: If you are not using the Additional Filters, use the **Hide/Show Additional Filters** button to hide the entire Additional Filters tray from view and show the tray again when needed.

Note: All functions within that tray will not be displayed, including for example, not only the Additional Filter buttons to the left and middle of the tray, but Transfers/Offsets Filter and Inflate buttons on the right for Non-Position. Open the tray again to see those options as needed. It is recommended that you keep Additional Filters displayed.