Filter Button Functions Including Drag and Drop

Overview of Filter Button Functions

1. Before using the Filter button, the query embedded in the workbook **MUST be refreshed first** in order to use the functionality (see Opening a Workbook in this guide for more on refreshing workbooks with single and multiple embedded queries).

2. Click on the Filter button located above the query results to display a list of all available characteristics in the left margin of the results.

   *Note:* **Older BEx 3.5 workbooks upgraded / saved in BEx 7.0 will still have the characteristics for filtering listed at the top in the first section of the results versus using a Filter button.**

3. Review the following points about the functions available when using the Filter button:
   - The characteristics in the left margin may be used to filter and drill-down OR add a drill down using the right click (Context Menu) on the characteristic.
   - In addition, you may simply double click on the characteristic to easily add the drill down for that characteristic (filter is not available via double clicking).

   Bullet Points Continued Next Page
Filter Button and Drag and Drop (cont.)

- The characteristics in the left margin may also be used to click and drag the characteristic into the body of the results to add a drilldown, as another option.

- In addition, you may click and drag the column heading to change the drill-down from “down” the report to “across the report or perform “swap with” functions as well.

- Some of these same filter and drill down options are also available via the right click (Context Menu) within the query results as outlined in previous chapters of this guide - choose the method you prefer to achieve the desired results.

4. To filter or add a drill down using the characteristics on the left, right mouse click on the characteristic and select the filter or drill down options from the resulting Context Menu – see the next examples in this guide.

Note: For older BEx 3.5 workbooks upgraded / saved to BEx 7.0, right mouse click right on a characteristic listed at the top to use the Context Menu.
5. Also, as an alternative to other methods, use the characteristics listed to “drag and drop” the characteristic into the query results in order to filter, swap with, or add / remove a drill-down and note the following:

- The above example shows that you can click on the characteristic Commitment Item and drag that value over to the column heading of Duke Cost Object, drop the value on top, and perform the swap function to swap the entire view from one by Duke Cost Object to one by Commitment Item.

- There are some drawbacks and nuances when using drag and drop functions, especially in more complex queries/workbooks where scrolling is needed, so use at your own discretion.

6. Refer to the next topics in this section of the guide for specific examples of both using the right click (Context Menu) on a characteristic and for dragging and dropping characteristics into the results.
Filter Button and Drag and Drop (cont.)

Filter by BFR Code/Org. Unit from a Higher Level of Hierarchy via the Filter Button

Note: This example is done from the Duke Cost Object view shown as a straight list with no hierarchy, but may also be done if the hierarchy is active. Use the Filter function to select multiple lower level BFR Code / Org. Units as desired.

1. Right click once on Link to Fund Center in the Filter section to display a drop-down list.

2. Select the option Select Filter Value... from the resulting pop-up window.
3. Click the **More>>** button to expand the pop-up window to view the Chosen Selections section.

4. Select the value or values as follows:
   - **Double Click directly on a value** to select.
   - Use the **Ctrl** key and click other codes to select **multiple** codes as desired.
   - Use the **Shift** key and click the **beginning and ending of a range** to select a range of codes.
5. Once values are selected, click on the Add button to display the selected values under the Chosen Selection section (right)

6. Click the OK button to complete the selection process and apply the filter to the query result.

7. Review the filtered query results and note that the BFR Codes / Org. Units selected for the Link to Fund Center filter are displayed in the Filter section to the left of the results.

    Note: To undo this action, right click once on the column header, on any cell with an actual value, or on the characteristic in the left pane. Select Back One Navigation Step. Another option is to right click in the Filter section on the Link to Fund Center text or on the filter values and select Remove Filter.
Filter Button and Drag and Drop (cont.)

Display Balances by Period Across the Report via the Filter Button

Note: This example is done from the Duke Cost Object view shown as a straight list with no hierarchy. Use the Drilldown According to function by Columns to add the drill-down using the Filter section to the right of results to provide additional detail, such as to display balances with the drill-down across the posting periods.

1. Click on the Filter button to display the Filter pane on the left.
2. Right click once on Posting period in the Filter Section to display a drop-down list.

Revised: 8/18/2017 10:16 AM
3. Select the option from the resulting pop-up window per this path: Add Drilldown According to Posting period in Columns (or Drilldown According to Posting Period in Rows if preferred).

4. Review the results and note the following:

- The Actual Amounts for each Duke Cost Object are now drilled down to show the balances for each Period across the next columns with the period listed in each column heading (or if “down” was chosen, the balances by period are in the rows).

- There are no totals displayed as default on this view, but totals may be added back per the next summarized steps.

   **Note:** Remember to use the Save button to save this view as an existing or new workbook for future use.

   **Note:** To undo this action, right click once on the column header, on any cell with an actual value, or on the characteristic in the left pane. Select Back One Navigation Step. Another option is to right click in the Filter section on the Link to Fund Center text or on the filter values and select Remove Filter.
5. **OPTIONAL:** To add back the total (results) rows if not displayed:
   - **Right click** once on the column heading for the characteristic (i.e., Posting Period like #, 1, etc.) to display a drop-down list.
   - Click on **Properties**… to display the Properties for Characteristic Posting period window.

6. In the **Results Rows** drop-down list, click on **Always Display**.
7. Click the **OK** button.
8. Review the results and note the following:

- The **Overall Result** row has been added to total the posting period columns across the query results for each Duke Cost Object row.

- There may also be a total added for each column at the bottom of the report to total each posting period down the report for all Duke Cost Objects.

- The **position of the results (Total) rows can be changed** (see previous chapter of the guide).

*Note:* Remember to use the **Save** button to save this view as an existing or new workbook for future use.
Using Drag and Drop to Perform the Swap Function via the Filter Button

Note: This example is done from the Duke Cost Object view of the Fund Trial Balance. If preferred, the Swap function may also be performed using the right click (Context Menu) within the query results versus using the Filter button and resulting left pane.

1. To swap the results displayed from a Duke Cost Object view (first column) to a Commitment Item (G/L Account) view per this example:
   - Click on the Commitment Item in the left pane and hold down the mouse click.
   - Drag the Commitment Item characteristic on top of / into the first column header (Duke Cost Object in this example) or on top of a value within the column.
   - Once the mouse cursor is over top of the desired location, let go of the mouse to “drop” the item being dragged onto the header / value desired (in this example dropping on the column header of Duke Cost Object).
2. Review the results showing the entire view of the query results is now swapped (in this example from a view by Duke Cost Object to a view by Commitment Item for the selected criteria).

   Note: Remember to use the **Save** button to save this view as an existing or new workbook for future use.

   Note: To undo this action, use **right click** once on the column header, on any cell with an actual value, or in the left Filter pane. Select **Back One Navigation Step**. Another option is to **drag and drop** the Duke Cost Object characteristic under the Filter section back on top of the Commitment Item column heading.
Filter Button and Drag and Drop (cont.)

Using Drag and Drop to Add a Drill Down via the Filter Button

1. To add drill-down to the results, like the drill down by Period for an Actual Amount column (using Fund Trial Balance as the basis for this example):
   - Click on the Period characteristic in the left pane and hold down the mouse click.
   - Drag the Period characteristic on top of a value in the Actual Amount (a **black small arrow** icon will appear in the body of the results to indicate if drill-down will be “down rows” or “across columns” – the black arrow is not displayed in example above).
   - Once the mouse cursor is over top of the desired location, let go of the mouse to “drop” the item being dragged onto the header / value desired (in this example dropping on the column header of Duke Cost Object).
2. Review the results and note the following:

- The Actual Amounts for each Duke Cost Object are **now drilled down to show the balances for each Period across the next columns** with the period listed in each column heading (or if “down” was chosen, the balances by period are in the rows).

- There are no totals displayed as default on this view, but totals may be added back per the next summarized steps.

**Note:** Remember to use the **Save** button to save this view as an existing or new workbook for future use.

**Note:** To undo this action, **right click** once on the column header, on any cell with an actual value, or in the left Filter pane. Select **Back One Navigation Step**. Another option is to use the **drag and drop** to remove the drill down by Periods from the results.
3. **OPTIONAL:** To add back the total (results) rows if not displayed:

   - **Right click** once on the column heading for the characteristic (i.e., Posting Period like #, 1, etc.) to display a drop-down list.
   - **Click on Properties…** to display the Properties for Characteristic Posting period window.

4. In the **Results Rows** drop-down list, click on **Always Display**.

5. Click the **OK** button.
6. Review the results and note the following:

- The **Overall Result** row has been added to total the posting period columns across the query results for each Duke Cost Object row.

- There may also be a total added for each column at the bottom of the report to total each posting period down the report for all Duke Cost Objects.

- The **position of the results (Total) rows can be changed** (see previous chapter of the guide).

*Note:* Remember to use the **Save** button to save this view as an existing or new workbook for future use.
Disable the Drag and Drop Function of the Filter Button if Preferred

Note: Given that there are nuances/drawbacks with dragging and dropping characteristics into complex workbooks AND the filter, swap with, and drill-down options are also available using the right click Context Menu, if you do not wish to use the new Drag and Drop function you may disable the function.

1. Click on the **BEx Design Toolbox: Workbook Settings** icon (last icon top toolbar)
2. Click in the check box to uncheck the option for **Allow Drag and Drop**.
3. Click **OK** to close.
4. Click on the **BEx Design Toolbox: Exit Design Mode** (first button top toolbar) to return to the results screen (for more on Design Mode, see next chapter of this guide).