The CSUF Data Warehouse allows you to filter data in order to find more specific information. There are two types of filters: calendar and drop down menu/search.

**Contents**

- Calendar Filter .................................................................................................................................................. 1
- Drop-Down Menu/Search Filter ........................................................................................................................ 3  
  - Selecting from Drop-Down Menu ............................................................................................................ 3  
  - Searching for Values ............................................................................................................................... 3  
- Clearing Your Filters ....................................................................................................................................... 11  
  - Clear My Customization ........................................................................................................................ 11  
  - Reset ................................................................................................................................................. 12

<table>
<thead>
<tr>
<th>Processing Steps</th>
<th>Screen Shots</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Calendar Filter</strong></td>
<td><img src="https://example.com/requisition_date_range.png" alt="" /></td>
</tr>
<tr>
<td>The calendar filter allows you to filter by a single date or a range of dates.</td>
<td></td>
</tr>
<tr>
<td><strong>Step 1:</strong> Type in a date in the following format: mm/dd/yyyy (i.e. 09/05/2010).</td>
<td></td>
</tr>
<tr>
<td>Or click on the calendar icon (📅) on the left to view the calendar.</td>
<td></td>
</tr>
</tbody>
</table>
## Processing Steps

| Step 2: | Select the starting date of your date range.  
Then click **OK**. |
| Screen Shots | ![Select Date and Time](image1.png) |

| Step 3: | Click on the calendar icon ( ) on the right. |
| Screen Shots | ![Requisition Date Range](image2.png) |

| Step 4: | Select the ending date of your date range. Then click **OK**.  
This date can be the same as your starting date if you want to search only one specific date. |
| Screen Shots | ![Select Date and Time](image3.png) |

<p>| Step 5: | Click <strong>Apply</strong> to apply your filter or add additional filter criteria. |
| Screen Shots | <img src="image4.png" alt="Requisition Date Range" /> |</p>
<table>
<thead>
<tr>
<th>Processing Steps</th>
<th>Screen Shots</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Drop-Down Menu/Search Filter</strong></td>
<td><img src="image" alt="Department/College" /></td>
</tr>
<tr>
<td>The drop-down menu/search filter allows you to select from</td>
<td><strong>Step 1:</strong> Click on the drop-down menu.</td>
</tr>
<tr>
<td>a drop-down list of values and/or search for values.</td>
<td></td>
</tr>
<tr>
<td><strong>Selecting from Drop-Down Menu</strong></td>
<td><img src="image" alt="Department/College" /></td>
</tr>
<tr>
<td><strong>Step 1:</strong> Click on the drop-down menu.</td>
<td><strong>Step 2:</strong> Select the value that you wish to use.</td>
</tr>
<tr>
<td></td>
<td>You can select multiple values by placing a checkmark next to each value you</td>
</tr>
<tr>
<td></td>
<td>want to select.</td>
</tr>
<tr>
<td></td>
<td><strong>Step 3:</strong> Click <strong>Apply</strong> to apply your filter or add additional filter</td>
</tr>
<tr>
<td></td>
<td>criteria.</td>
</tr>
<tr>
<td><strong>Searching for Values</strong></td>
<td><img src="image" alt="Account" /></td>
</tr>
<tr>
<td><strong>Step 1:</strong> Click on the drop-down menu.</td>
<td><img src="image" alt="Account" /></td>
</tr>
<tr>
<td>Processing Steps</td>
<td>Screen Shots</td>
</tr>
<tr>
<td>------------------</td>
<td>--------------</td>
</tr>
</tbody>
</table>
| **Step 2:**     | ![Image](image1.png)  
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.”* |

| **Step 3:**     | ![Image](image2.png)  
You now have several options for searching and selecting values.  
You can use the search function to search for one or more values to add those to your criteria.  
You can have the system show you all available values, browse the list, and add those values to your criteria as you browse.  
View the instructions below to see how to do both of these and the pros/cons of each. |
## Searching for Values
Searching for values allows you to quickly find and add the values you want to your report.

**Step 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)

**Step 2:**
Enter your search criteria and click **Search**.

⚠️ 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 Services” and the value is “Supplies and services” then the system will not find a match if this box is checked.)

**Step 3:**
A list of search results appears.
### Selecting a Single Value

**Step 1:**
To select a single value from the list on the left, click on it.

**Step 2:**
Then click on the Move arrow icon ( ) to move it to the Selected column.

**Step 3:**
The value now appears in the Selected column.

Click **OK** if you are done setting up this filter.
### Processing Steps

<table>
<thead>
<tr>
<th><strong>Selecting Multiple Consecutive Values</strong></th>
<th><strong>Screen Shots</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1:</strong> Select a range of consecutive values by holding 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.</td>
<td><img src="image1" alt="Select Values Screen Shot" /></td>
</tr>
<tr>
<td><strong>Step 2:</strong> Then click on the Move arrow icon ( ), to move the selected values to the Selected column.</td>
<td><img src="image2" alt="Select Values Screen Shot" /></td>
</tr>
<tr>
<td><strong>Step 3:</strong> The values now appear in the Selected column. Click OK if you are done setting up this filter.</td>
<td><img src="image3" alt="Select Values Screen Shot" /></td>
</tr>
</tbody>
</table>

Last Revised: 07/21/14
### Selecting Multiple Non-Consecutive Values

**Step 1:** Select multiple values that are not consecutive by holding 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.

**Step 2:** Then click on the Move arrow icon (移到) to move the selected values to the Selected column.

**Step 3:** The values now appear in the Selected column.

Click OK if you are done setting up this filter.
## Selecting All Available Values

### Step 1:
Before selecting all values, you will want to ensure that all the available values are showing. In the example on the right, you can see that there are more available choices.

Click **More** to show more choices.

You may have to click **More** several times to get all available choices.

### Step 2:
Once the More button no longer appears, all available choices should be showing.

Click the Move All arrow button (**) to move all available values to the Selected column.

### Step 3:
The values now appear in the Selected column.

Click **OK** if you are done setting up this filter.
### Removing Values from Selected Column

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

You can use the Shift or Ctrl/Command key to select multiple values.

**Step 2:**
Once your values are selected, click on the Remove arrow icon ().

**Step 3:**
The values that you remove now appear in the Available column.

Click OK if you are done setting up this filter.
### Processing Steps

<table>
<thead>
<tr>
<th>Removing All Values from Selected Column</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1:</strong> To remove all values from the Selected column, click the Remove All arrow icon ( ).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Screen Shots</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Select Values Window" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2: The Selected column is now empty.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click <strong>OK</strong> if you are done setting up this filter.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Clearing Your Filters</th>
</tr>
</thead>
<tbody>
<tr>
<td>There are two options to clear all of your filters: clear your customization and the reset button.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Clear My Customization</th>
</tr>
</thead>
<tbody>
<tr>
<td>This option automatically removes your filters/customizations and applies the default settings for the report.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 1: To clear out your current filter criteria, click the Page Options icon ( ).</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Page Options Icon" /></td>
</tr>
</tbody>
</table>
# Processing Steps

## Step 2:
Select **Clear My Customization**.

---

## Step 3:
All of your filter criteria is automatically removed and your results are returned to the default for that Page.

---

## Reset
Reset allows you to go back to the last settings you applied or to the default settings for the report. However, you must click Apply for these changes to take effect.

---

## Step 1:
Click **Reset**.
### Processing Steps

#### Step 2:
Choose the type of reset you wish to perform:
- **Reset to last applied values**: resets to the last filter that you applied.
- **Reset to default values**: resets to the default settings for the report.
- **Clear all**: clears all filters on the report.

#### Screen Shots

<table>
<thead>
<tr>
<th>Reset</th>
<th>Reset to last applied values</th>
<th>Reset to default values</th>
<th>Clear All</th>
</tr>
</thead>
</table>

### Screen Shots

**Step 3:**
Click **Apply** to apply the changes.

The filters will have altered to show you what filters will be applied when you click **Apply**.