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In a BDM Hyperion document the Filter dialog box is used in three sections.
1. Query
2. Results
3. Table

1. In the **Query section** you are filtering the data from the warehouse.
   - Warehouse $\rightarrow$ Results
2. In the **Results section** you are filtering the data you have retrieved from the warehouse.
   - Warehouse $\rightarrow$ Results$\rightarrow$Reports, Pivots, Charts
3. In the **Table section** you are filtering data from the Results section.

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**Filter Dialog Box**

The example below outlines the structure of the Filter box.

![Filter Box Structure Diagram](image)

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**Figure 1: Filter Box structure**
Tip: The Edit field is displayed only if you are entering a custom value.

Filter Controls

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Name</td>
</tr>
<tr>
<td>2</td>
<td>Include Nulls</td>
</tr>
<tr>
<td>3</td>
<td>Not</td>
</tr>
<tr>
<td>4</td>
<td>Show Values</td>
</tr>
<tr>
<td>5</td>
<td>Custom Values</td>
</tr>
<tr>
<td>6</td>
<td>Select All</td>
</tr>
<tr>
<td>7</td>
<td>Transfer</td>
</tr>
<tr>
<td>8</td>
<td>Operator</td>
</tr>
<tr>
<td>9</td>
<td>Ignore</td>
</tr>
<tr>
<td>10</td>
<td>Custom Values Edit Field</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Advanced or Options</td>
</tr>
<tr>
<td>12</td>
<td>Values Field</td>
</tr>
<tr>
<td></td>
<td>Custom SQL</td>
</tr>
</tbody>
</table>

Table 1: Filter Control Values

Filter Operators & Values

8 Operator | Allows you to select a comparison operator for the filter expression.

Hint: Hyperion is case sensitive and you must be aware of how fields are formatted. An improper filter could return “0 of 0 Rows” in the Results section.
<table>
<thead>
<tr>
<th>Symbol &amp; Operator</th>
<th>Meaning</th>
<th>Type of Value</th>
<th>Example</th>
</tr>
</thead>
</table>
| = Equal           | Equals the specified value(s). | Multiple | Enter: 50, 75, 80
|                   |         |               | Returns values equal to 50, 75, 80 |
| <> Not Equal      | Does not equal the specified value(s). | Multiple | Enter: 50, 70
|                   |         |               | Returns values not equal to 50 or 70 |
| < Less Than       | Less than the specified value(s). | One     | Enter: 100
|                   |         |               | Returns all values less than 100 |
| <= Less or Equal  | Equal to or less than the specified value(s). | One     | Enter: 100
|                   |         |               | Returns all values less than or equal to 100 |
| > Greater Than    | Is greater than the specified value(s). | One     | Enter: 200
|                   |         |               | Returns all values greater than 200 |
| >= Greater or Equal | Is equal to or greater than the specified value(s) | One | Enter: 180
|                   |         |               | Returns all values greater than or equal to 180 |
| Begins With       | Begins with the specified value(s) up to and including the end value | Multiple (non-numeric) | Enter: WIN
|                   |         |               | Returns all values that begin with “WIN” |
| Contains          | Contains the specified value(s) regardless of location. | Multiple (non-numeric) | Enter: Thro
|                   |         |               | Returns all strings that contain “Thro” |
| Ends With         | Ends with the specified value(s). | Multiple (non-numeric) | Enter: ed
|                   |         |               | Returns all strings that end with “ed” |
| Like (% wildcard) | Placement of % (wildcard) determines the value(s) | Multiple (non-numeric) | %trin returns any record with trin at the end,
|                   |         |               | %are% returns any record with are anywhere in the word,
|                   |         |               | Da% returns any record with Da at the beginning |
| Between           | Retrieves records where the value of the filtered item lies between and equals the specified values | Two numeric values | Enter: 15, 80
|                   |         |               | Return all values between 15 and 80
|                   |         |               | Retrieves only records where the value of the limited items lies between and is equal to the specified values; works with dates |
| Is Null           | Has no value; for example a field in which no data has been entered. | No value supplied | Returns all null records, where no data value has been entered and therefore has no value (a "space" is a value) |
| Not (with operator) | Negates the operator it precedes, reversing the results of the limiting operation. | Value optional | |
Query, Results & Table Filters

Query section *filters data from the warehouse.*

When opening a BDM Hyperion document, you are presented with filter boxes. You must select (highlight) your choice in the filter box. Even if it is the only choice in the filter box! The following filter boxes are examples of what you will be presented with.

![Figure 4: Unit Description Filter](image)

![Figure 5: Dept Description Filter](image)

![Figure 6: Fiscal Year Filter](image)

![Figure 7: Load Date (1) Filter](image)

![Figure 8: Account Num Filter](image)

![Figure 9: Load Date (2) Filter](image)
The following table shows which BDM documents use which Filter boxes and the figure number associated with the limit boxes.

<table>
<thead>
<tr>
<th>Budget DataMart Document</th>
<th>Filter Boxes</th>
<th>In order of appearance</th>
</tr>
</thead>
<tbody>
<tr>
<td>PS Encumbrance Expense Summary Fund Balance Perm/Onetime Budget Revenue Summary</td>
<td>Unit Description Department Description Fiscal Year Load Date (1)</td>
<td>Figure 4 Figure 5 Figure 6 Figure 7</td>
</tr>
<tr>
<td>FYxx FB &amp; WComp Filled Position</td>
<td>Unit Description Department Description</td>
<td>Figure 4 Figure 5</td>
</tr>
<tr>
<td>Open Commitments</td>
<td>Unit Description Department Description Account Num Fiscal Year SL Subcode Load Date (1)</td>
<td>Figure 4 Figure 5 Figure 6 Figure 7</td>
</tr>
<tr>
<td>Perm/Onetime Transaction</td>
<td>Fiscal Year Account Num Load Date (1)</td>
<td>Figure 6 Figure 8 Figure 7</td>
</tr>
<tr>
<td>All Year to Date reports</td>
<td>Fiscal Year Account Num Load Date (2) SL Subcode</td>
<td>Figure 6 Figure 8 Figure 9 Figure 10</td>
</tr>
<tr>
<td>3 Yr Actuals &amp; Perm… 5 Yr Actual Expenses…</td>
<td>Account Num</td>
<td>Figure 8</td>
</tr>
<tr>
<td>Monthly Expense/Revenues</td>
<td>Load Date Fiscal Year Account Num Proc Month Name SL Subcode</td>
<td>Figure 9 Figure 6 Figure 8 Figure 11 Figure 10</td>
</tr>
</tbody>
</table>

Table 3: Report & Filters

Figure 10: SL Subcode Filter
Figure 11: Proc Month Name Filter
Local Filters are Results & Table filters

Local filters are useful for managing and analyzing your information. If you do not need all information retrieved by the query, you can use a local filter to exclude data from view.

- Local filters are useful for temporary or hypothetical situations.
- Local filters can always be modified or removed.
- Removing the local filter(s) returns the original data retrieved by the query.
- Local Filters are applied to the data elements that are found on the Query Request line.

**Results section filters data retrieved from warehouse.**

**Table section filters data from the Results section.**

The filter is applied to a column of data in the Results and or Table section. Since the Report, Pivot and Chart sections use the Results or Table section data, filters created in these sections are also reflected in the Report, Pivot and Chart sections.

### Setting a Local Filter

**Example:** Using the BDM Expense Summary document you want

- Only Project Accounts
- Wages
- Fringe Benefits
- Workers Comp

1. Go to Results section
2. There are two data elements that can be used to filter data to reflect just Project account information
   a. Value operator will be Equal for both options
   b. Filter on **Yr End Proc** (P)
   or
   c. Filter on **Fiscal/Project** (Fiscal)
   d. Place the cursor anywhere inside the column
   e. Double click to open the Filter box
   f. Click Show Values
   g. Select the value
   h. Click OK
3. There is one data element that can be used to filter for Fringe Benefits and Workers Comp
   a. Value operator will be Equal
b. Filter on SI Subcode Desc

c. Place the cursor anywhere inside the column
d. Double click to open the Filter box
e. Click Show Values
f. Select each values (multiple values - select one hold down Ctrl and select all others)
g. Click OK

Tip: To turn on/off the filter status bar, Click on Filters(×)

| Filter | Fiscal/Project | SI Subcode Desc | Filters(×) Sort(×) Data Layout |

Tip: You can apply only one operator value per filter

Change and Remove a Local Filter

Change

➢ To open the Filter box
  o In the Filter status bar double click on the element name to open the filter box
  or
  o In the Filter status bar select the element, right click, from the shortcut menu select Filter…
  or
  o Place the cursor anywhere inside the column and double click to open the Filter box
➢ Make your changes

Remove

➢ In the Filter status bar select the element, right click, from the shortcut menu select Remove
  Or
➢ In the Filter status bar select the element, click the Delete key on your keyboard
### Using Show Values

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>Shows all associated values from the database or dataset.</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You must be aware of what you are asking for when using the Show Values in the Query, Results or Table sections. The Show Values feature provides a list of values derived from the content of the warehouse, Results or Table section. Show Values retrieve every unique value available.

#### Query section
- Show all the values for the data element in warehouse that you have access to
- For example:
  - you are using the YTD expense document
  - and when you are presented with the Account Filter box you choose Show Values
  - you ask to have all the data returned to you for every account you have access to **YIKES!**

#### Results and Table section
- Show all values for the data element in the Results or Table section that have been returned from the warehouse
- For example:
  - you are using the YTD expense document
  - the Query section filter boxes are completed as followings:
    - Fiscal Year = 10
    - Account Num = 123456
    - Load Date (2) >= 07/01/09
    - SL Subcode *begins with* and all are selected
  - the document processes and data is returned to the Results section
  - filtering on the subcode element
  - selecting show values in the Filter box only shows the values in the Results section
Using Custom Values

A Custom Values list can be used to set a filter and are created by or supplied to you. A good reason to use custom values is when a data item very rarely changes.

**Transfer and Advanced / Options**

Using the Transfer and Advanced / Options provides for the use of a custom list of values to be added and selected from.

The following are two examples:

1. **Transfer** - a custom list is created from values in the warehouse
2. **Advanced / Options** - a custom list is create as a .txt file with values

**Example 1: Transfer**

This allows you to add selected from the warehouse then place values to the custom list.

![Custom Values Transfer button](image)

![Edit field for Custom Values](image)
- Using the Expense Summary document
- Using a local limit (Results) on Account Num
- **Show Values**
- **Select** the values you want
- **Transfer** those values as your filter
Example 2: Advanced / Options

| Advanced or Options | Display options to read values from a separate file or database, and to create a subquery |

Tip: When opening a Filter from the Results section, the Advanced is displayed as Options.

Figure 3: Query Filter dialog box
Figure 4: Local Filter dialog box

You will not have to type each one of the account numbers into the limit box.
You will need to create and maintain the text (.txt) file listing the account numbers.

Creating the text (.txt) file

For this example the txt file name is “Psych accts.txt”.

Creating a txt file can be done in the following ways:
1. Open Notepad and enter account numbers in a column
2. Open the Expense Summary document
   a. Export the Results to Excel
   b. Remove all columns but the “Account Num” column
   c. Remove the first row with the “Account Num” title
   d. Save as text (.txt) file
For Hyperion Analysis users only.
3. Create a Table or Pivot report with account numbers
   a. Export as text (.txt) file

- Using the Expense Summary document
- Using a local limit (Results) on Account Num
- Select the Options button
- Under Loaded Values Settings, select the Load From File option
Select the txt file you create (Psych acct.txt)
Selected the Open button.

You return to the filter box, Select the **Show Values** (Note that “Load From File” is also selected)
- Select all or any of the accounts to be filtered

- Select the OK to complete the filtering process

**Ignore**

<table>
<thead>
<tr>
<th>Ignore</th>
<th>Disables the filter when the query is processed</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td></td>
</tr>
</tbody>
</table>

Temporarily suspends a filter without deleting it from the Query, Results or Table section.