FILTER FUNCTIONALITY

Each report, in the Endowment Reporting application, includes a Filter Options page. Filters, on this page, give users the ability to choose which data is included or excluded in the report. Filter choices are dependent on the data contained in the report (e.g. fiscal year; program code; Raiser's Edge ID, Chart 1 or 2, etc.).

Display All Report Data

To display all information in a report, click the fiscal year/period drop down arrow; and choose the appropriate fiscal year/period. To generate your report, click the execute button in the bottom right corner of the filter options screen.



Display Specific Report Data

Filters containing functionality that provide users the ability to add or exclude data displayed in a report and are illustrated below:

• At the bottom of each filter, there are two radio buttons. The '=' radio button indicates data to be included in the report; '<>' indicates data not to be included in the report.



The magnifying glass is used to search all the data within a specific field (e.g. all endowment program codes) and choose which endowment program codes should be included or excluded from the report.

1. Click the magnifying glass:



 Select the data you are wanting to include or exclude from the report and click the Add button. Notice, the radio button below is selected to exclude these codes from the report. There program codes E0001 and E0002 will be excluded from the report.

| 1332 record(s) found Search | E0002 |
|---|---------------------------|
| VALUE TEXT | E0001 |
| THEOLIGAT | 20001 |
| E0000 E0000 Endowment investment pool | |
| E0001 E0001 1975 Vikes Men's Soccer Championship Award | |
| E0002 E0002 50th Anniversary Humanities SCH | |
| E0003 E0003 50th Anniversary SCIE Sholarship | |
| Select record(s) then press Add Add | $\bigcirc = \bigcirc < >$ |
| | |

HINT: Use the %, wild card, to search for specific words. (e.g. %Chair% will return all endowment program code names that contain the word 'Chair'.

| Search for: 11 record(s) found | %Chair% | | |
|-----------------------------------|------------------|---------------|---|
| | | Search | h |
| VALUE TEXT | | | - |
| E0147 E0147 Chair in | Environmental L | aw and Policy | |
| E0148 E0148 Chair Ec | onomic Relation | s with China | 1 |
| E0149 E0149 Chair in | Itl Commercial I | .aw | |
| E0150 E0150 Chair in Change | Marine Ecosyste | ms & Global | • |
| Select record(s) then | press Add | Add | |

3. When you have finished applying your filter options , click the green Execute Report button at the bottom right of the filter options screen to generate your report.