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 dependant 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.
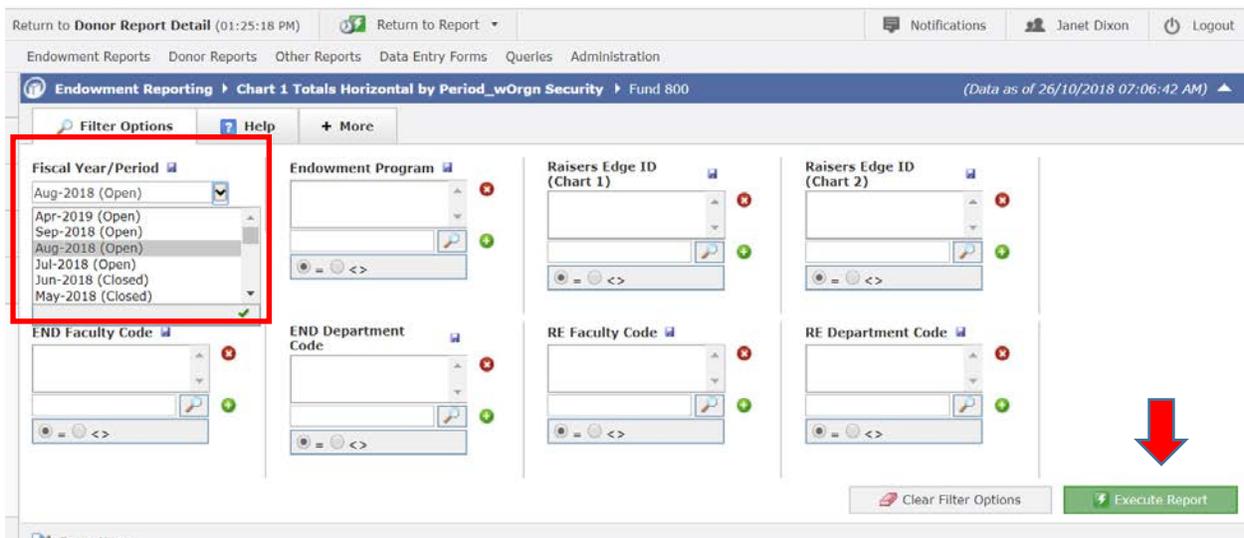
Display Specific Report Data

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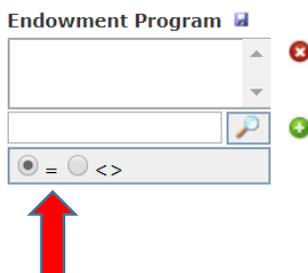
The magnifying glass is used to search all the data within a specific field (e.g. all endowment program codes) and choose which endowment program codes should be included or excluded from the report.

1.   Click the magnifying glass:
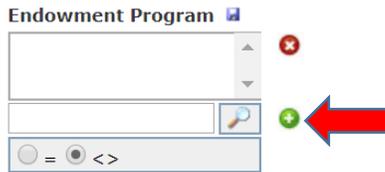
2.   Select the data you are wanting to include or exclude from the report and click the Add button. Notice, the radio button below is selected to exclude these codes from the report. There program codes E0001 and E0002 will be excluded from the report.
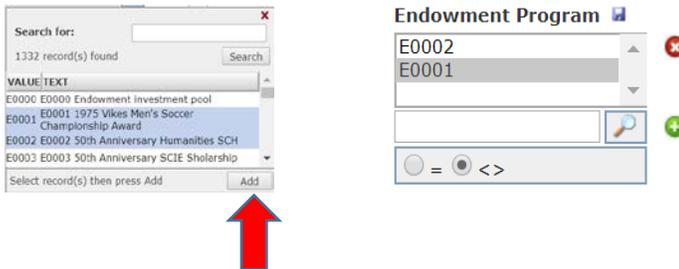
HINT: Use the %, wild card, to search for specific words. (e.g. %Chair% will return all endowment program code names that contain the word 'Chair'.
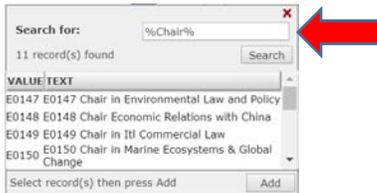
3.   When you have finished applying your filter options , click the green Execute Report button at the bottom right of the filter options screen to generate your report.