

## Using the Filter Menu

The **Filter Menu** allows users to select items you want to populate in your report. The filters are presented in drop-down menus, with some containing checkbox functionality. Choices you make on the **Filter Menu** will be used across all the report tabs. Refer to the [Scenarios job aid](#) to test out several scenarios for using filters and pulling data into the report tabs.

**NOTE:** The **Filter Menu** will not bring in any filters you selected on other My-UI-Financials pages or from the last time you logged in and used the **Financial Summary Trends** page, nor will any of the filters you select on the **Trends** page carry over into the rest of My-UI-Financials. The **Filter Menu** does not save any pre-set options for your specific unit, department, CFOPs, etc. Each time you use this tool, you must re-select the filters you wish to use. If you navigate away from the Trends page, even if you stay within My-UI-Financials, you must start from a blank **Filter Menu** when you return.

The **Filter Menu** contains the following options:

- **Chart:** This is a required field. Use this option to select Chart of Accounts (COA) code.
- **College:** Use this option to select two-character College code.
- **School:** Use this option to select three-character School code.
- **Department:** Use this option to select three-digit Department code or three-digit Org code.
- **Sub-Org:** Use this option to select from six-digit Sub-Org code. Do not use this filter for the three-digit Org code. You can search for a specific Org code by typing the first few numbers of the code directly into the filter field, and a list of possible options will populate in the Organization drop-down menu from which you can select your option. When looking at Grants, Self-Supporting, Service Plans, or Agency Funds, leave the default filter set to *All*, since the General Ledger balances for these will be excluded and the balances shown will not be accurate.
- **CFOP:** Use this option to select from a list of CFOPs; General Ledger entries will be represented by Chart-Fund-Department breakdowns. When looking at Grants, Self-Supporting, Service Plans, or Agency Funds, leave the default filter set to *All*, since the General Ledger balances for these will be excluded and the balances shown will not be accurate.
- **Type of Funds:** Use this option to select from types of funds, such as State, Institutional, Self-Supporting, Gift/Endowment, etc.
- **Fund Type:** Use this option to select from [fund types](#) listed by the two-character Level 2 fund code, such as 1A, 2D, 3Q, etc.
- **PI:** Use this option to select name of the Principal Investigator on the grant associated with the selected fund CFOP.
- **Grant:** Use this option to select from a list of grant names and codes associated with the grant CFOP.
- **Fiscal Year:** This is a required field. Use this option to select from current and past four fiscal years. When looking at previous fiscal years, remember that you are looking at a

snapshot of the data at year end close, not based on the date you accessed the data here, which means that it may still show encumbrances that have since been resolved.

- **Fiscal Period:** This is a required field. Use this option to select one or more specific fiscal periods; includes individual fiscal periods 1 through 14, *plus Lapsed Period Adjustment* (used to convert State Funds to Planning & Budgeting logic); do not uncheck the *GL & ENC - Keep Selected* option, as this applies General Ledger and Encumbrance balances to totals. The budget is connected to the fiscal period, therefore, if you look at a single fiscal period, it will only reflect the budget income during that single period, not the budget for that period or the fiscal year. For example, if your budget funds are disbursed into your account in August, you will only see them if you select August as the fiscal period.

**NOTE:** Selecting a particular fiscal period gives you the information only for that period, not information up to that period. For example, selecting Period 5 will provide information only for the month of November; it will not provide information for all months up through November. This provides flexibility so you can easily pinpoint data from a specific month, but also requires you to individually select all months you wish to see in your report.

## How Filters Work

### Filters relate to other filters and have a cascading effect

Filters are related to one another and selections made at one filter level will determine what options are available in other filter categories. For example, what you select in the **Chart** field determines the options available in the **College, School, Department fields**, etc. This cascading effect works even if you begin your selection with a lower-level filter like **School** or **Department**. The selection you make here will populate information in higher-level filters that you skipped, and will determine what is available in all the lower-level filter categories. It is a recommended best practice to always make a selection in the **Chart** field to start your filtering process. For each filter selected, the page needs time load in order to update the contents of the rest of the filters.

### Selecting filters

Use the **Filter Menu** to select the specific choices for items you want to populate in your report. Each filter category present a drop-down menu of possible selections. Some filter categories list selections without checkboxes, and some use checkboxes as the selection mechanism. All filters have a default option selected or checked (see below). To choose options besides the default setting, you may first need to deselect the default option for each filter category, then select the individual option(s) you want for your report.

The filters will start loading immediately as you select or deselect them. When you are finished making your selections, click back on the filter field to hide the filter drop-down menu. Selections made on the **Filter Menu** carry over across all the report tabs, except for the **Graphs** tabs, where you may need to re-select **Fiscal Year** and **Fiscal Period**. Again, for each filter selected, the page will need time load information.

### Default filter states

The default filter setting for most filters is *All*, except for **Fiscal Year**, where the default setting is *None*. The *All* default setting will pull information from the entire University of Illinois System. It is recommended to make selections on multiple filters to obtain the information you want.

### Clearing selected filters

To clear all the filters you selected, click on the **Revert** icon on the **Toolbar**. This removes all filters applied and takes you back to the default filter state.

To clear selections within a specific filter category, simply click the red "x" on the filter icon above the filter field name (this icon may only be viewable with as you move your mouse over the filter name). You will only be able to use this method to clear filters where you have made actual selections, not on filters that you skipped over or that were left at the default setting.



### Skipping filters

On the **Filter Menu**, you can skip over higher-level filters and go directly to a specific lower-level filter, and your selection will load information to all the filters, as described in the cascading filters section. For example, you can directly select an option under **School** or **Department**, and the filters will begin to load from that selection. However, it is a recommended best practice to always make a selection in the **Chart** field to start your filtering process.

### Display of selected filters

After applying your filters, a summary of the selected filters displays in a box under the title at the top of the report tab viewing window. This allows you to keep track of the active filters in your report. This display may not show the full list of filters selected if you chose multiple filters in any category. For example, if you selected 10 CFOPs, the display for the **CFOP** label would list the first three CFOPs, then show "and 7 more."

### Filtering Takes Time

Due to the large amount of data that can be aggregated with this tool, it takes time for the reports to load after you make each filter selection. Allow time for the page to populate the data after each filter selection and when clicking on different report tabs.

Refer to the [Scenarios job aid](#) to test out several scenarios for using filters and pulling data into the report tabs.