**Filter by Members**

Filter and Drill-Down on a Member Displayed in the Results Such as to Filter to a Single Cost Object or Lower Level BFR Code

*Note:* This example is done from the Fund Trial Balance query where the view shown is by Duke Cost Object as a straight list with no hierarchy, but may be done in any view or for any Member displayed in the crosstab of the results.

![Excel Screen Shot](image)

**Note:** As a reminder, workbooks must be refreshed after opening before options are available.

1. To drill-down to a single member, simply **double click** on a cell containing the text or key for that single value (in this example the first Duke Cost Object column contains the text name of the cost object and the second column contains the key number of the seven-digit cost object, and either cell can be used).

   *Note:* This is the recommended method to filter, as using other methods to filter like the **Filter** button on the Analysis toolbar or the **Context Menu right click** may cause Excel to stop responding if there are large number of members included in the results. See the **Troubleshooting** section of the guide for more details.
2. **Scroll up** to review the filtered results as the cursor stays in the Excel workbook at the cell that you selected.

3. If desired, add a drilldown using the Design Panel to drag and drop a member directly into the Rows section or directly into the crosstab results (see the Analyzing and Formatting: Drag & Drop to Add or Remove Drill-Down section of the guide).

4. Review the filtered results of the added drill-down and continue to analyze and format the results for the filtered data.
Filter by Members (cont.)

Filter and Drill-Down on a Member Not Displayed in the Results Such as to Filter by One or More Fund Groups

Note: This example is done from the Fund Trial Balance query where the view shown is by Duke Cost Object with no hierarchy. The Fund Group is an available member under Data Source in the Design Panel Analysis tab, but not originally displayed in the query results. Similar steps may be used to filter on other members as needed.

1. If desired, add the drill-down for the member to be filtered by using the Design Panel Analysis tab to drag and drop the member directly into the crosstab results or into the Rows section (for example to display the Fund Groups in the rows before filtering to specific Fund Groups groups).

Note: The steps for filtering may vary slightly depending on whether you add the drill-down before filtering or not (see the Analyzing and Formatting: Drag & Drop to Add or Remove Drill-Down section of the guide).
Filter by Members (cont.)

2. If the member to be filtered was added to the rows, such as Fund Group in this example, right-click on that column heading or anywhere within an active cell within the added rows and select the Filter by Member… option.

   Note: If the rows are added, such as Fund Group in this example, you may also simply double-click directly on a value in a row, such as A (Allocated Funds) and the results will filter and drill-down to that selected member.

3. If the member to be filtered was NOT added to the rows, right-click directly on the member listed under the Data Source section in the Design Panel Analysis tab and select the Filter by Member… option.

   Note: The Filter by Member… option is also available by using the Context Menu right-click on the member under the Data Source section, but you will lose the added drill-down to the rows and have to add that back to the results (for example the Fund Group column listing the fund groups in the rows will be removed).
4. In the resulting Filter by Member… window (name varies by member), click on the check box beside Select All to uncheck which deselects all the other values listed.

*Note:* If you know the value(s), for example Fund Group A for Allocated Funds, use the Find Members search at the top of the window. Entering an A in the search field will yield the one value match for Allocated Funds. If you do not know the values, then using the steps to uncheck and find the values is the better option.
5. Scroll to find the members to be used for the filter and **click in the check box or boxes** to select one or more members for the filter (in this example the filter is for A - Allocated Funds).

**Note:** As a reminder, if you know the values, for example A for Allocated Funds, use the Find Members search at the top of the window. **Entering an A in the search field will yield the one value match for Allocated Funds.**

6. Click **OK** to apply the filter by a member.
7. Review the filtered results and note the following about this example:

- The results show just Cost Objects that belong to the **A – Allocated Fund Group**.

- Since the drill-down for Fund Group was already added to the rows of the results before filtering, the Rows section within the Design Panel shows the Fund Group listed AND a Filter Symbol icon now displays beside Fund Group member to indicate there is a filter in place.

- Your results may vary depending on how you filtered and you may need to add drill-downs or continue to analyze and format the data in other ways.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Duke CostObject</strong></td>
<td><strong>Cost Object</strong></td>
<td><strong>Fund Group</strong></td>
<td>Actual Amount</td>
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<td></td>
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<td>MEDICAL EVACUATION AND SECURITY POLICY</td>
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</tr>
</tbody>
</table>

In this example, the drill-down was added for Fund Group earlier and now a Filter symbol indicates the results are filtered by Fund Group as well.
Filter by Members (cont.)

Copy and Paste Values from the Clipboard into Filter by Members

Note: When filtering by members, buttons are available in the lower left of the Filter by Member window to populate the values by either copying and pasting from a clipboard or importing values from an existing file. This may be helpful when selecting many values. This feature is also available when selecting prompts for a query and choosing the Add Lines Using Filter by Member option.

1. First, be sure to copy the values into the clipboard as follows:
   - List the values into individual cells of an Excel spreadsheet sequentially in a column as shown in the example above (in this example the values of A and R were listed for Allocated and Restricted Fund Groups).
   - Highlight and copy the values into the clipboard (CTRL + C).

2. Access the Filter by Member window using the Context Menu right click on either the column heading (if that member is displayed in the crosstab) or within the Design Panel Analysis tab as previously outlined in this section of the guide.
Filter by Members (cont.)

3. On the Filter by Member window, click on the Paste from Clipboard button.

4. Review the values now selected for the Filter by Member (in this example, A and R Fund Groups are the only two values selected)

5. Click OK to filter the results.
Filter by Members (cont.)

Import and Paste Values from a File into Filter by Members

Note: When filtering by members, buttons are available in the lower left of the Filter by Member window to populate the values by either copying and pasting from a clipboard or importing values from an existing file. This may be helpful when selecting many values. This feature is also available when selecting prompts for a query and choosing the Add Lines Using Filter by Member option.

1. First, be sure to create an Excel file with the values to be imported as follows:
   - The first value MUST be entered in the first cell (Cell A1).
   - Enter other values in the cells directly below (Cell A2, A3, etc.; in this example the Fund Groups of A, R, and E are listed for Allocated, Restricted, and Endowments).
   - Reminder, if entering cost objects there are no dashes in the value
   - Use the default format of General in the cells (do not change).
   - Save the file as a Text Tab Delimited file and exit Excel before importing.
2. Access the Filter by Member window using the Context Menu right-click on either the column heading (if that member is displayed in the crosstab) or within the Design Panel Analysis tab as previously outlined in this section of the guide.

3. On the Filter by Member window, click on the Paste from File button.

4. In the resulting Open window, select the .txt file to be imported and click Open.
5. Review the values now selected for the Filter by Member (in this example, A, R, and E Fund Groups are the only values selected)

6. Click **OK** to filter the results.
Filter by Members (cont.)

Insert a Filter for Quick Data Filtering

Note: In addition to the many methods to filter and drill-down, the Analysis Design tab on the toolbar provides a Filter button that allows you to insert fields to do simple and quick filtering of data.

1. Click into an Excel cell outside of the crosstab results where the filter should be inserted.

2. Ensure the Analysis Design tab is selected on the top toolbar.

3. Click on the Drop-down for the Filter button and select the desired filter option (Fund Group in this example).

Note: This button will NOT be activated or available until an Excel cell outside of the crosstab results has been selected for the insertion of the filter.
4. In the resulting filter that has been inserted, use the cell outlined in green to add values for the filter as follows:
   • Click on the Funnel icon beside the cell outlined in green.
   • Deselect the checkbox for Select All to uncheck all selections.
   • Click in one or more checkboxes to select values for the filter criteria (Allocated Funds is selected in this example).
   • Click OK to apply the filter.

5. Review the results that are now filtered as selected, add more quick filters, or change filter values using the inserted filter(s).

   Note: All tables on the current sheet that contain the dimension (like Fund Group) will be filtered. If all tables should not be filtered, use the Components tab in the Analysis Design Panel to define the tables for the filter.