

The new eReports allows you to filter your reports directly in the tool. Follow these steps to take advantage of the new **Basic Filter** feature:

1. First, ensure you select **New Version** from the **Report Version** dropdown, add in your report parameters, then click **Fetch Report**.

2. *Optional:* Once your report opens, you may wish to select the **Raw data view** option. This may not be available for all reports.

Fiscal Year	Date	Account Description	Transaction Description	Source	Journal / PO / Voucher ID	Journal Ref / Invoice #	PO Reference	Vendor / Reference	Budget Amount	Transaction Amount
Reverse Accounts										
033000	ICR Sal-Wages									
2023	05/20/2022	ICR Sal-Wages		BU	BU100833802	BU3024		BU3024	61,488.00	-
2023	04/28/2023	Tb KimK upgrade project		ULC	0000847881			771130	-	(287.02)
Total - 033000 - ICR Sal-Wages									61,488.00	(287.02)

3. **Enable Interactivity** by opening the **Main Menu** (hamburger icon located in the top-left of your screen).
4. Click **Enable Interactivity**.

Manager	Fiscal Year	Account Type	Account	Account Description	Date	Transaction Line Description	Source
	2022	Expense	486600	Equip Computer-Under \$20,000	04/11/2022	1x laptop SR666160	ULC
	2022	Expense	486600	Equip Computer-Under \$20,000	04/11/2022	1x dock SR666160	ULC
	2022	Expense	240100	Ben Ft Support Staff Yaaa	02/24/2022	Tb MileyC payment	ULC
	2022	Expense	140100	Sal Ft Support Staff Yaaa	02/24/2022	Tb MileyC payment	ULC
	2022	Expense	455000	Computer Software-License Fee	04/28/2022	INC673314 SEP	ULC
	2022	Expense	455000	Computer Software-License Fee	04/28/2022	INC673318 Res Grad	ULC
	2022	Expense	455000	Computer Software-License Fee	04/28/2022	License Fee	ULC
	2022	Expense	455000	Computer Software-License Fee	04/28/2022	License Fee	ULC
	2022	Expense	455000	Computer Software-License Fee	04/28/2022	SMS x1	ULC
	2022	Expense	455000	Computer Software-License Fee	04/28/2022	INC629644 Science x2	ULC
	2022	Expense	455000	Computer Software-License Fee	04/28/2022	INC615201 HR x7	ULC
	2023	Expense	140000	Sal Ft Support Staff-CPM	05/20/2022	Sal Ft Support Staff-CPM	BU

- Once interactivity is turned on, select the column you want to filter, and click the **Filter icon** (funnel).

TRANSACTION DETAILS REPORT

Fund Code	Cost Centre	Account Description	Date	Transaction Line Description	Source	Vendor / Reference	Budget Amount	Transaction Amount
200	230087	Equip Computer-Under \$20,000	04/11/2022	1x laptop SR666160	ULC	DallP96643	-	1,371.42
200	230087	Equip Computer-Under \$20,000	04/11/2022	1x dock SR666160	ULC	DallP96643	-	135.62
200	230642	Ben Ft Support Staff Yusa	02/24/2022	Tfr MileY C payment	ULC	771130	-	(1,378.07)
200	230642	Sal Ft Support Staff Yusa	02/24/2022	Tfr MileY C payment	ULC	771130	-	(4,445.38)
200	230087	Computer Software-License Fee	04/28/2022	INC673314 SEP	ULC	PowerBI	-	(21.96)
200	230087	Computer Software-License Fee	04/28/2022	INC673318 Ras Grad	ULC	PowerBI	-	(21.96)
200	230087	Computer Software-License Fee	04/28/2022	License Fee	ULC	PowerBI	-	(21.96)
200	230087	Computer Software-License Fee	04/28/2022	License Fee	ULC	PowerBI	-	(21.96)
200	230087	Computer Software-License Fee	04/28/2022	SMS x1	ULC	PowerBI	-	(21.96)
200	230087	Computer Software-License Fee	04/28/2022	INC629644 Science x2	ULC	PowerBI	-	(43.92)
200	230087	Computer Software-License Fee	04/28/2022	INC613201 HR.x7	ULC	PowerBI	-	(153.72)
200	230087	Sal Ft Support Staff-CPM	05/20/2022	Sal Ft Support Staff-CPM	BU	BU3024	(142,262.30)	-

This will open the basic filter window, which is comprised of several fields:

Filter

a Budget Amount

b Condition: Equal to

c Value: Select values f

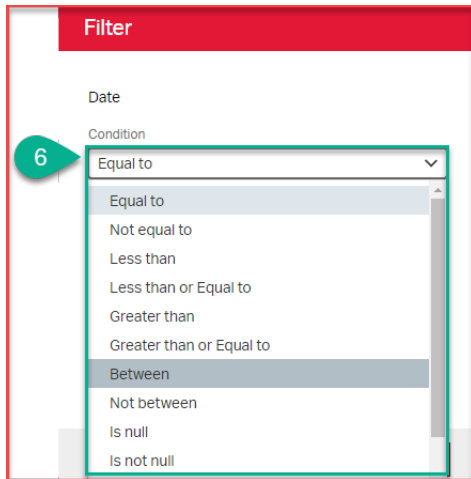
d Advanced Filter | Clear Filter g

Recalculate Totals

e Cancel | Apply h

	Element	Description
a	Column Title	The title of the column you're setting the filter for. In this case, "Budget Amount."
b	Condition	The condition dropdown allows you to choose the type of condition you'd like to apply to the column. There are 15 condition options, which are described in the Condition Descriptions table below.
c	Value	This is an input field where you specify the exact value or values you'd like to filter by. Depending on the condition selected, you might input a single value or multiple values.
d	Advanced Filter	Opens a more detailed filtering window.
e	Cancel	Closes the filtering window without applying any changes to your report.
f	Select Values	A selection modal which provides exact option(s) based on the content in your report.
g	Clear Filter	Removes any filter(s) on the current column.
h	Apply	Applies a filter based on the conditions and values selected.

6. Select your desired filter condition from the **Condition** dropdown. There are 15 conditions you can use to filter your reports. See the table below for descriptions. For our example, we are going to choose **Between**.



Condition Descriptions

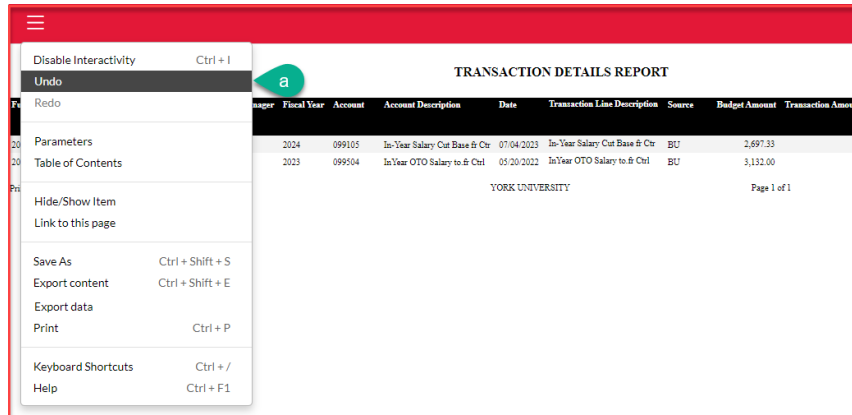
	Condition	Description
1	Equal to	This condition filters the records by checking if a field's value matches a specified value exactly.
2	Not equal to	This condition allows for filtering records where the value of a field does not match a specified value. It's the direct opposite of 'equal to' and is used for excluding specific values.
3	Less than	This filter condition selects records where the value of a certain field is less than a specified value. It's used to identify records that fall below a certain numerical or date threshold.
4	Less than or Equal to	This condition works for identifying records where a field's value is either less than or exactly equal to a specified value. It's useful when you're considering a maximum limit that includes the boundary value.
5	Greater than	This filter condition applies to records with a value greater than a specified point. It's often used to filter results that exceed a specific minimum numerical or date value.
6	Greater than or Equal to	This condition is for selecting records with a field's value that is either greater than or exactly equal to a specified value. It is beneficial when considering a minimum limit inclusive of the boundary value.
7	Between	This filter is used when you need records that have values within a specified lower and upper boundary. It's particularly useful for identifying records falling within a certain numerical range or date period.
8	Not between	This condition is the opposite of 'between' and is used to exclude records that fall within a certain range of values. It helps in narrowing down results by omitting a specific segment of records.

9	Is null	This condition filters for records where the specified field holds no data or is empty. It's used to find records that are missing information in certain fields.
10	Is not null	This filter condition identifies records where specific fields are not empty. It's useful for ensuring that the records you retrieve have data in certain fields.
11	Like	This filter identifies records using the wildcard characters (%). It searches for partial matching. For example, if we're looking for entries containing the word " quarterly ," we use the Like condition and input " %quarterly% " to capture all applicable instances. These conditions are case-sensitive.
12	Not Like	This filter identifies records using the wildcard character: %. It searches for records that do not partially match the wildcard phrase. For example, if we're looking for records that don't contain the word " quarterly ," we use the Not Like condition and input " %quarterly% " to capture all applicable instances. These conditions are case-sensitive.
13	In	This condition selects records where the value of a field is among a list of specified values. It's useful when you're looking for any of several specific values.
14	Not in	This is used to filter records so that you only retrieve those where the value of a certain field is not within a list of specified values. It helps exclude multiple specific values from your results.
15	No Condition	This implies no specific filtering condition is being applied to the records. It's typically used when you want a complete set of records returned without any filtering constraints.

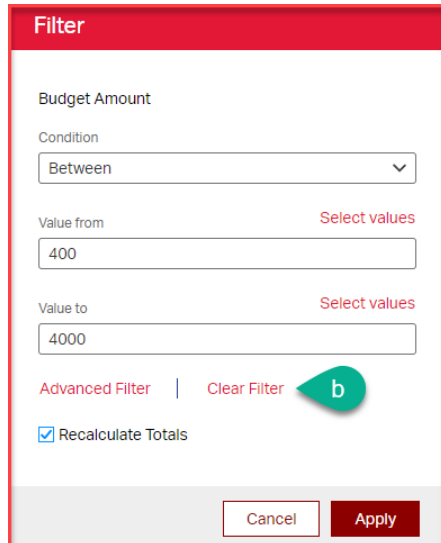
- The **Between** option requires us to input a value into the **Value from** and **Value to** fields. For this example, we will input 400 and 4000, respectively. This will search for all records that have a budget amount between those values.

- Click **Apply** to apply the filter.

9. You may want to remove a filter once you've applied it. There are two easy ways to do this:
 - a. Click **Undo** from the **Main Menu**.



- b. Reopen the filter and select the **Clear Filter** option, then click **Apply**.



Check out the following video for an in-depth tutorial on Filtering Reports with the New eReports:

