Filtering (Concepts):

The purpose of filtering is to simplify the selection of accounts. The complexity of Account Selection is dramatically simplified by Department Selection and/or Fundtype Selection and turning filtering on.

If department filtering is on, then the only accounts that are available in Account Selection are those from department level choices. The subtitle under "Departments for Report" (e.g., "--- Dept Level 2 (Filter On) ---") specifies the current department level and the current status of department filtering. It is important to remember that a department level choice represent all the departments within the it for purposes of the report. For example, if the current department level is Dept Level 2 and "Sch Medicine" has been added to the Departments for Reports selection box, then the department level choices consist of all departments within the School of Medicine.

If fundtype filtering is on, then the only accounts that are available in Account Selection are those from fundtype choices. The subtitle under "Fundtypes for Report" (e.g., "--- Fundtype (Filter On) ---") specifies the current fundtype level and the current status of fundtype filtering. It is important to remember that a fundtype choice represents all the fundtypes within the it for purposes of the report. For example, if the current fundtypes level is Fundtype and "03-Contracts and Grants" has been added to the Fundtypes for Reports selection box, then the fundtype choices consist of all Contracts and Grants fundtypes.

Filtering is automatically off by default so that all accounts are initially available. When changes are made to departments or fundtype selections, any corresponding filters that were previously applied are automatically turned off. This is done to ensure that all accounts are available while the user is making changes.

The relationship between departments and accounts is 1-to-many. Thus, if you know the account number then you know the corresponding department. Likewise, the relationship between fundtypes and accounts is 1-to-many. Thus, if you know the account number then you know the corresponding fundtype. As a result, department filtering and fundtype filter are only used for Account Selection and have no affect on the report once accounts have been added to the Accounts for Report selection box.

Accounts that have been explicitly added to the Accounts for Report selection box by the user determine the report regardless of the current department level choices and the current fundtype choices. Once again, the purpose of filtering is to simplify the selection of accounts not to restrict account choices. The advantage of this approach is that filtering can be used repeatedly to easily find accounts and add them to the Accounts for Report selection box without having to include previous department level choices and fundtype choices in the search. Results for accounts in the report are not affected by department level choices and are not affected by fundtype choices.

Department filtering also is used for the purpose of Fundtype Selection. If department filtering is on, then the only fundtypes that are available in Fundtype Selection are those from department level choices. In contrast to accounts, the relationship between departments and fundtypes is many-to-many. Thus, if you know the fundtype then you don't know the corresponding department. As a result, department filtering does have an affect on the report once fundtypes have been added to the Fundtypes for Report selection box. Nevertheless, results for fundtype in the report are based upon department level choices. Hence, if a fundtype has been added to the Fundtypes for Report selection box prior to applying a department filter, there may be no results for that fundtype.

Fundtype filtering also is used for the purpose of clarifying Field Selection for fundtype specific fields. The only fields that are available in Field Selection and Fields for Report are those from fundtype choices. If you use the default "All Available" in the "Fundtypes for Report" selection box, then the fields in the report are not based upon fundtype choices.