

Filtering Reports

Description

Filters are a powerful tool for creating numerous variations of any available report. If filters are not properly set for a report, the report will return unnecessary or unhelpful data. For this reason, it is important to use report filter options for most EnergyCAP reports.

This topic will...

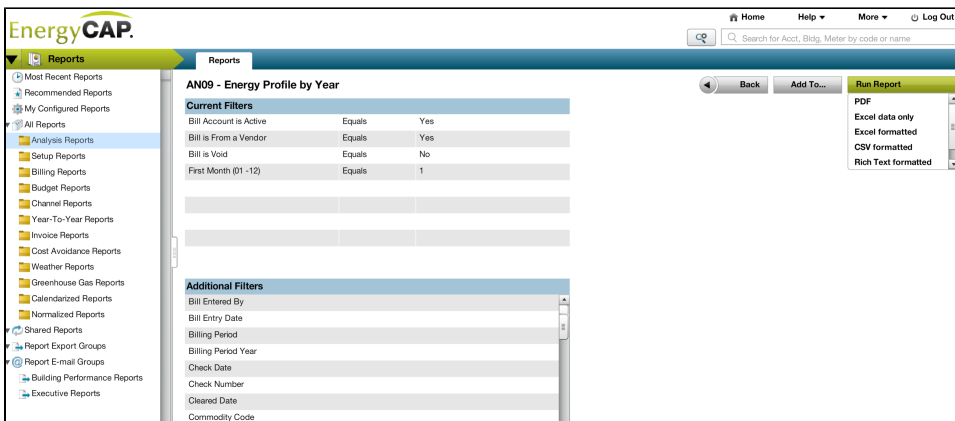
- describe the process for filtering reports.
- explain the purpose of the green filters.
- explain all operators.

Prerequisites

- ALL roles have the ability to create, modify and delete report filters.

Step-by-Step

1. Select **Reports** from the Main Menu. A list of all reports divided into folders by category will appear on the left.
2. Select the folder for the desired report category. All available reports for the selected category will appear on the right.
3. Select/highlight the desired report from the list. A report sample image will appear on the right, along with a report description.
4. After reviewing the report image/description, click **Continue**. A list of Current Filters and Additional Filters will appear.
 - **Current Filters** are filters that are currently set to be applied for this report.
 - **Additional Filters** are other available filters that can be added to this report.
5. Make all necessary filter changes.
 - To remove a **Current Filter** from the report, click to highlight the filter name from the **Current Filters** list and then click **Clear**. The filter will be removed.
 - To add an **Additional Filter** to the report, click to highlight the filter name from the **Additional Filters** list. Filter settings for that filter will be displayed. Enter/update all filter information and **Save**. The filter will be added to the **Current Filters** list.
6. Repeat Step 5, adding and removing filters as necessary, until the filter configuration is satisfactory.
7. Click **"Run Report"**. The format options for export are:
 - PDF
 - Excel data only
 - CSV formatted
 - Rich Text formatted
 - Word formatted



The reports run in Excel, CSV, and Word formats will be saved as files in the respective format. Those in PDF format will appear in a new tab in your web browser.

Rules & Restrictions

- Your EnergyCAP administrator has the ability to restrict user access to all data, or just a subset of data based on a Topmost node in the Buildings & Meters and/or Account hierarchies. Topmost means that the user has access to items directly under that node in the hierarchy, but cannot access anything else. This topmost permission also applies to the user's reports, regardless of the filters selected.
- Report filters are saved for the specific user only. They will not be applied to reports created by other users.
- When adding filters, the filter settings value field can either be selected from a dropdown list of acceptable values OR entered as text to return all possible matches. This is determined by the Administrator under **Global Settings**.
- Shared Reports and Email reports have a different set of rules for saving filters. Refer to the help topic pages in these areas for more information.

Additional Information

Q: What are the filters highlighted by the green font color?

A: The green font is user to distinctly mark the filters that are recommended for that report by EnergyCAP. These filters are recommended for two reasons: Either it was determined that the report will provide more meaningful data if the recommended filters are used OR two filters are mutually exclusive and one is suggested. i.e. Topmost Place Name vs. Topmost Place Code.

Q: What is an Operator?

A: An Operator is a parameter that helps define a filter. The following operators are used:

Equals	Only data matching the input filter Value will be included in the report.
Not Equals	Only data not matching the input filter Value will be included in the report.
Less than	Only data with a value less than the input filter Value will be included in the report.
Between	Only data between the input filter Values will be included in the report.
One of	Only data matching the selected input filter Value(s) will be included in the report. Click to select from available values. Shift-Click to select a range.
Greater than	Only data greater than the input filter Value will be included in the report.
Less than equal	Only data less than or equal to the input filter Value will be included in the report.
Greater than equal	Only data greater than or equal to the input filter Value will be included in the report.
Like	Only data including the the input filter Value will be included in the report.
Not like	Only data not including the input filter Value will be included in the report.
Not one of	Only data not matching the selected input filter Value(s) will be included in the report. Click to select from available values. Shift-Click to select a range.
Not Between	Only data not between the input filter Values will be included in the report.

Q: Is there a filter I can use to see only our internal bills? We use EnergyCAP for our campus chargebacks.

A: The "**Bill is From a Vendor**" filter is a ubiquitous filter in EnergyCAP reports. Although the default setting for this filter is "Yes" (including all bills from your external vendors), you can change this filter to "No" (or remove it) to view chargeback bills you are generating internally:

BL08 - Gaps Between Existing Bills

Current Filters		
Allowable Gap Days	Equals	1
Bill Account is Active	Equals	Yes
Bill is From a Vendor	Equals	No
Bill is Void	Equals	No