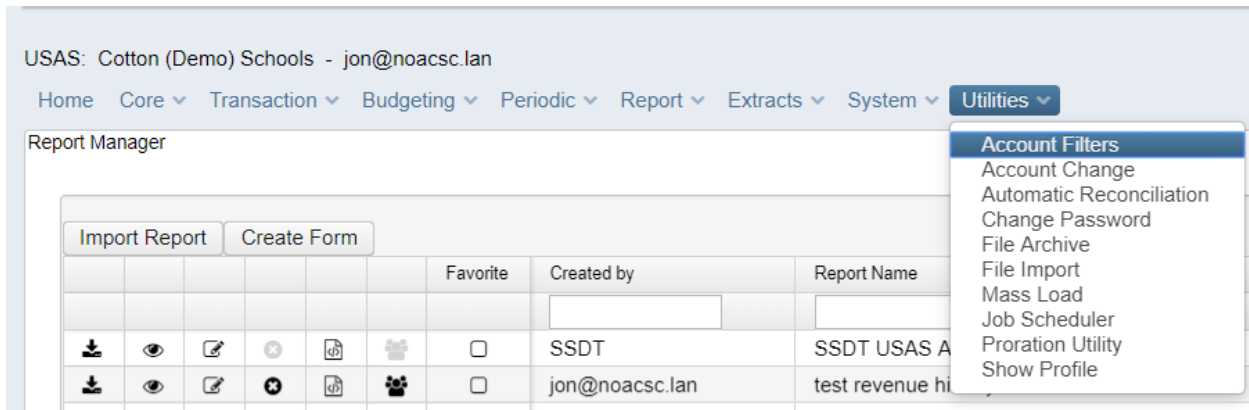


Account Filter Guide

Account filters let you run reports for specific sets of account codes and can be used to limit what certain users can do with specific accounts. This is only available for USAS.

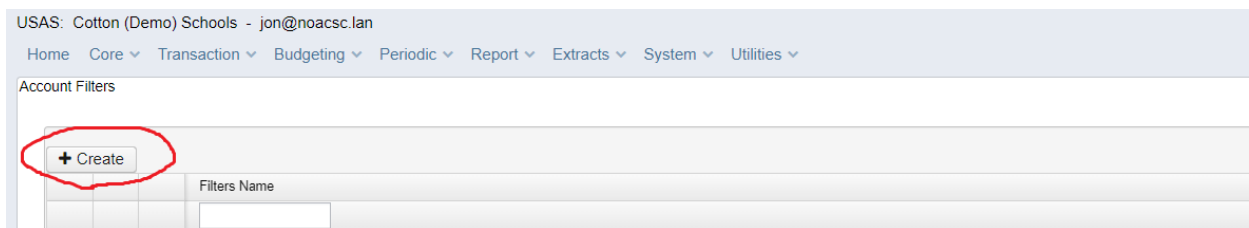
How to create a filter:

Account filters are located under the Utilities tab.



Here you can view and edit all created account filters and create new ones.

Click Create to make a new filter.



Creating a filter Guidelines:

- **TI Codes:**
 - A TI code must be used for each filter. The TI codes represent the following:
 - 00 – Cash Account
 - 01 – Appropriation Account
 - 02 – Budget Account
 - 03 – Revenue Account
- **Wildcard:**
 - In Classic, the asterisk “*” was used for a wildcard. In Redesign, it is the percent symbol “%”.
 - You don’t have to apply the wild card for every digit. For example, you could filter reports starting with object codes starting with 1 in the following different ways:

- **Access Letters:**

- The Access letters stand for the following. If you only want to filter codes for reports, use the read access. The other accesses deal with users creating/editing existing accounts:

- C – CREATE
- R – READ
- U – UPDATE
- D – DELETE
- P – PREENCUMBRANCE
- E – ENCUMBRANCE

- **Filter between a range of numbers**

- You can filter between a range of number by entering a starting range number, followed by two periods (“..”), and an ending range number.
- For Example, the following will filter fund 006 with object codes between 100 and 599. You could also enter two wildcard symbols after the 1 and 5 but it is not necessary.

Account Filters

	Delete		TI	Fund	Func	Receipt	Object	SCC	Subject	OPU	IL	Job	Access
1			02	006			1..5						C R U D

- **Applying Account Filters:**

- There are two ways to use account filters. Assign a filter to a user or apply it to a report using the filter property.
 - Assign to User: Under System-> Users, Select/Create a user and select a filter in the Filters drop down menu:

Example: How to assign a filter to a user

The screenshot shows a 'User' configuration window with the following fields and options:

- Username: aarontillman
- Name: Aaron Tillman
- Title: (empty)
- Email: aarontillman@example.net
- Assigned Roles: ADMINISTRATOR, EMIS_SIF, Findet Access, SYSMAN_USER, USAS_MANAGEF, USAS_REQ
- Filters: EXAMPLE (highlighted with a red circle)
- Created Date: (calendar icon)
- Requisition Prefixes: (empty)
- Restrict Requisitions:
- Balance Checking:
 - Allow Negative Appropriation:
 - Allow Negative Budget:
 - Warn on Negative Amounts:
- Controls:
 - Account Expiration: (calendar icon)
 - Password Expiration: (calendar icon)
 - Enabled:
 - Locked:
 - External Authentication:
- Status:
 - Last Login: (calendar icon)
 - Account Expired:
 - Password Expired:

In the background, a navigation menu is visible with 'System' and 'Utilities' dropdowns. The 'System' dropdown is open, showing options like Configuration, Custom Field Definitions, DBA, Modules, Monitor, Remap Budgets, Roles, Rules, and Users.

- This will limit what the user can create and edit.
- **NOTE: A user will still be able to run reports for all accounts. To apply a filter to reports, follow the next set of instructions.**
- To apply a filter to a report, the filter property must be added in the Configure Filters tab of the Custom Report Creator. To see how to do this, look at page 4 and 5 of the Custom Report Creator Guide at: <http://www.noacsc.org/wp-content/uploads/2019/02/Custom-Report-Creator-Guide.pdf>
- When generating a report, enter the account filter name into the filter parameter. **Note: the parameter must be spelled exactly the same with the same capitalization as listed in the Account Filters.**

Example: How to enter a filter into a report

Generate Report + x

Budget Summary Sorted by OPU and Full Account Code

Save and Recall Most Recent

Format: PDF (download)

Page Size: Letter

Orientation: Landscape

Name: Budsum

Summary Report

Show Report Options

Query Parameters

Include Full Account Code (i.e. 001-1110-511-0000-000000-001-00-000)

Include Fund (use % for wildcard)

Include Function (use % for wildcard)

Include Object (use % for wildcard)

Include SCC (use % for wildcard)

Include Subject (use % for wildcard)

Include OPU (use % for wildcard)

Include IL (use % for wildcard)

Include Job (use % for wildcard)

Active only? (true/false)

Filter Name