Data Miner: Techniques
Contents

Date Range Filters ................................................................. 1
Find Subtotals Using Section Prompts .................................. 2
Grouping Data with Prompts .................................................. 4
Keeping or Removing Rows ..................................................... 5
List Filters ............................................................................. 6
Pattern Match (Wildcard - %) Filters ..................................... 7
Printing Your Results ............................................................ 9
Saving, Applying, and Editing Customizations ....................... 10
Getting Results for Multiple DAs ............................................ 12
Sorting Your Results to Locate Data ...................................... 14
Hiding, Excluding, and Retrieving a Hidden Column ............... 15
Date Range Filters

Date range filters limit the records to a specific date range.

Example

You want to review records in the AP Expenditure Detail dashboard for August 2013. Enter a beginning and end date in the *GL Date (+) Between* fields by typing directly into the field or by choosing a date from the calendar.

- **Entering directly into the field:**
  - Use numeric data only
  - Any format below is correct:
    - mm/dd/yyyy
    - m/d/yyyy
    - m/d/yy

- **Choosing from the calendar:**
  - Access the calendar by clicking the calendar/clock icon just to the right of the beginning or end date user input fields.
  - The default is the current date.
  - Choose a date by clicking on it.
  - Change the month by clicking its arrow.
  - Change the year by clicking its up/down arrow.

Results

Results contain only the records falling within the date range chosen.

<table>
<thead>
<tr>
<th>GL Date</th>
<th>Supplier Name</th>
<th>Distribution Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/28/2018</td>
<td>STAPLES BUSINESS ADVANTAGE</td>
<td>$4.26</td>
</tr>
<tr>
<td>8/24/2018</td>
<td>STAPLES BUSINESS ADVANTAGE</td>
<td>$20.25</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$191.94</td>
</tr>
</tbody>
</table>
Find Subtotals Using Section Prompts

Find subtotals based on any criteria by using Section Prompts on dashboards that include a total (except YTD Budget Status and Grants EBSR). You are able to find subtotals in the following dashboards:

- Grants Expenditure Detail
- AP Expenditure Detail
- Account Analysis
- LD to GL Encumbrance
- LD to GL Transfer

Situation:

Find subtotals for multiple Departmental Activities (DAs)

1. Complete the filters. Type or paste multiple DAs directly into the DA(s) filter using semicolons to separate each DA (For example, 310880391;310880368;310880365). For other ways to enter DAs, see “Searching by Multiple DAs.” Click Apply.

2. Make sure the criteria you would like to find subtotals for is a column header. In this case, we first need to make the DA available by including the Departmental Activity column in the results.

   To include the column, right-click on a column header, hover the mouse pointer over Include Column, and then click Departmental Activity.

3. Move the Departmental Activity column to a Section Prompt using one of the following two methods.

   a. Drag and Drop: Hover the mouse pointer over the Departmental Activity column header until a 4 sided arrow appears over a bar (called a “grab bar”). Click on the grab bar and, without releasing the mouse, move the column upwards until a thin blue line appears called Sections. Release the mouse.
b. **Menu Options:** Right-click in the *Departmental Activity* column header, hover the mouse pointer over *Move Column*, and click *To Sections*.

![Image showing menu options]

4. After you create the section prompt, scroll down the page to see the subtotal for each DA. The subtotals replace the grand total.

You can also find subtotals by Fund, PI Name, Expenditure Category or any other criteria. As with DA, move the column for which you would like to find subtotals to a Section Prompt. Remember to start with a fresh analysis or remove the DA section prompt first!

![Image showing subtotal calculation]

**To remove a section prompt:**

1. Hover the mouse pointer just to the left of any of the now-separated DAs. Click on the grab bar, and without releasing the mouse, move the DA over the table.

![Image showing section prompt removal]

2. Release the mouse when you see a thin blue line to place the Departmental Activity column back into the table.

For more information on creating Section Prompts, see the next page, “Grouping Data with Prompts.”
Grouping Data with Prompts

Prompts enable you to organize the appearance of the data according to your own criteria.

- **Section Prompt** – All records are visible but separated on the screen.
- **Table Prompt** - A drop-down arrow allows one category of record to be selected and viewed.

**Situation:**

You have run the *EBO Trial Balance PTD* dashboard for a Fund associated with numerous Departmental Activities (DA). Now you would like to group the records by DA.

**Section Prompt using the “grab bar”**

1. Hover your mouse over the DA column until you see a grab bar and a four-pronged arrow.
2. Click the grab bar and, without releasing the mouse, move the column upwards.
3. A thin blue line appears called *Sections*. Release the mouse to create a Section Prompt.

The screen refreshes to show the data grouped by DAs.

**Table Prompt using a Menu**

1. Right-click in the *DA* column header and hover the mouse over *Move Column*.
2. From the expanded menu, choose *To Prompts*.

Records are visible for just one DA at a time. Click the drop-down arrow to display the records for another DA.

**Note:** Both methods – the “grab bar” and the menu - work for both Section and Table Prompts.
Keeping or Removing Rows

Use the content of a cell to keep the records you need or remove the records you don’t need.

Situation:

You want to see only Office Depot purchases. After running the EBO AP Expenditure Detail dashboard, an expenditure record shows Office Depot in the Description column.

To view all records containing Office Depot in the Description column, use Keep Only.

1. Locate a cell containing Office Depot in the Description column.
2. Right-click within the cell containing Office Depot to bring up a menu.
3. From the menu, choose Keep Only.
4. The screen will refresh. The only records now shown are those with Office Depot in the Description column.

Situation:

You don’t want to see any Office Depot purchases. After running the EBO AP Expenditure Detail dashboard, an expenditure record shows Office Depot in the Description column.

1. Locate a cell containing Office Depot in the Description column.
2. Right-click within the cell containing Office Depot.
3. From the menu, choose Remove.
4. The screen will refresh. All records containing Office Depot in the Description column have been removed from the screen.
List Filters

Select one or multiple values from a pre-populated list to limit the records retrieved, such as limiting a list of expenditures to those that occurred during a specified fiscal year.

Selecting a single entry from a drop-down list

In the EBO AP Expenditure Detail dashboard, you want to retrieve expenditures that occurred in just one fiscal year, 2014.

• Click the drop-down arrow to access the list of Fiscal Year choices.
• Click only the year 2014.

Results

The only records retrieved are for expenditures that occurred in FY 2014.

Selecting multiple entries from a drop-down list with checkboxes

In the EBO Suppliers dashboard, you want to retrieve records of all suppliers that are classified as either EMPLOYEE or IN (Individual).

• Click the drop-down arrow to access the list of Supplier Type choices.
• Check one or more boxes in the list:
  • Check the box to the left of EMPLOYEE.
  • Check the box to the left of IN.

Results

The only records retrieved are for suppliers classified as Employee or IN.
Pattern Match (Wildcard - %) Filters

Pattern match filters allow you to search by the full value or a part of the value. When you don’t know the exact name or account number to enter in a filter box, you can use a wildcard symbol, the percent sign (%), as a replacement for the missing characters. The records you retrieve will vary depending on the placement of the wildcard symbol as Data Miner matches the pattern you entered. See the examples below for details.

**Name Example**

- When the percent sign *follows* the name, records will be retrieved for entries that *begin* with the characters entered.
  - Entering Office% retrieves any supplier beginning with Office.

- When the percent sign *precedes* the name, records will be retrieved for entries that *end* with the characters entered.
  - Entering Office% retrieves any supplier ending with Office.

- When two percent sign *surround* the name, records will be retrieved for entries that *contain* the characters entered, regardless of the placement of the name.
  - Entering %Office% retrieves any supplier containing Office.

Examples:

- Office of Governor
  - Officemax Inc

- Conway Law Office
  - Pittsburgh Panthers Ticket Office
  - Texas General Land Office

- Office Depot
  - Box Office
  - Law Offices of Barbara Lynn Utt
  - Government Finance Officers
Number Example

- When the percent sign follows numbers, records will be retrieved for entries that begin with the numbers entered.
  - Entering 14% retrieves any DA beginning with 14.

- When the percent sign precedes numbers, records will be retrieved for numbers that end with the numbers entered.
  - Entering %14 retrieves any DA ending with 14.

- When two percent signs surround numbers, records will be retrieved for numbers that contain the numbers entered.
  - Entering %14% retrieves any DA containing 14.
Printing Your Results

Data Miner results can be sent to a PDF or HTML format and then printed.

1. To print your results, click the **Page Options** menu (upper right corner) and then the **Print** link.

   OR

   Click the Print link in the bottom left portion of the screen.

2. The Print expandable menu displays two options.
   - The **Printable PDF** option exports the results that are currently displayed on the screen to a PDF.
   - The **Printable HTML** option exports the results that are currently displayed on the screen to an HTML window.

When you see the blue arrows at the bottom of the screen, additional records meet the criteria you entered in the filters, but they are not yet displayed on the screen. If you wish to print all results, first retrieve all results by clicking the blue double arrow at the bottom of the screen. Then click the **Print** link.

If you click the Print link without first retrieving all the results by clicking the blue double arrow, only the results viewable on the screen will print.

**Note:**

- Results printed from the Page Options Menu contain the name of the dashboard and filter values; results printed from the bottom left link do not contain these details.
Saving, Applying, and Editing Customizations

Data Miner allows you to customize the layout of your reports and then save the customized layout and filter values for later use.

Saving a Customization for Later Use

1. Within a dashboard, click a tab to open a report. Enter the desired filters, click **OK**, and then **Apply**. Customize the results as desired (e.g., keeping or removing specific values, moving columns to prompts or sections, adding or hiding columns).
2. Click the **Page Options** hamburger menu in the upper right corner, under your name.
3. Click **Save Current Customization**.
4. Enter a name for your customization and click **OK**. Both the filters and layout will be saved.

Opening (and Revising) a Saved Customization

1. Within a dashboard, click a tab to open a report, but do not enter any filters.
2. Click the **Page Options** hamburger menu in the upper right corner, under your name.
3. Hover over **Apply Saved Customization**.
4. An expanded menu displays all saved customizations for that dashboard. Choose the desired customization from the list.
5. The screen displays the results according to the customization’s filters and layouts.

Revising the Customization:

1. After steps 1-5 above, enter new filters or change the layout.
2. From the **Page Options** hambruger menu, click **Save Current Customization**.
3. Enter the current name of the saved customization, and then click **OK**.
4. A message will pop up asking if you wish to replace the current saved customization. Click **Yes**.
Deleting a Saved Customization

1. Within a dashboard, click a tab to open a report.
2. Click the Page Options hamburger menu in the upper right corner, under your name.
3. Click **Edit Saved Customization**.
4. Click the radio button of the customization you wish to delete.
5. Click the red X.
6. Click **OK**.

“Un-Defaulting” a Customization

Setting your saved customizations to “default” will cause the report to automatically run every time you open the report. This can cause problems when filters are added or changed. Therefore, we do not recommend checking “Make this my default for this page” when saving a customization. Follow the steps below to remove the default from a customization.

1. Open the report with the saved customization.
2. Click the Page Options hamburger menu in the upper right corner, under your name.
3. Click **Edit Saved Customization**.
4. Under the My Default column, click the radio button next to No Personal Customizations.
5. Click **OK**.

Changing filters for a default customization

If you want to change the information you put in the filters for a default customization, you must first stop the report from populating. When you see Searching… To cancel, click here, click on here. Data Miner will stop searching and display Request Canceled. Then you can change the filters and click **Apply**.
Getting Results for Multiple DAs

Some reports have a DA drop-down list filter that allows you to search for multiple, non-contiguous DAs. With the flexibility of the DA filter and the More/Search option, it's easy to get only the data you need. Below are the four methods to search for multiple DAs

Option One

Enter multiple Departmental Activities directly into the field, separated by a semi-colon.

Option Two

1. Click the drop-down link in the Select Value field.
2. Check the boxes of the multiple DAs.
Option Three
1. Click the drop-down link in the **Select Value** field.
2. Click **More/Search**.
3. If necessary, change the criteria from **Start** to **Contains, Ends, or is Like**.
4. Enter a portion of the DA in the **Search** field.
5. Click **Search**.
6. Click a DA and then click the arrow to move the DA to the **Selected** portion of the screen.
7. Click **OK**.

Option Four
1. Copy the values in an external application (e.g., Excel).
2. Click the drop-down link in the DA **Select Value** field.
3. Click **More/Search**.
4. Click the pencil icon in the **Selected** portion of the screen.
5. In the **Edit** screen, press Control + V to paste the values.
6. Click **OK**.
Sorting Your Results to Locate Data

Sorting your results enables you to locate a specific record, as shown in the examples below.

**Sorting with an Icon - ** Ascending (A-Z or lowest number to highest number)

**Situation:**
You have run the *EBO AP Expenditure Detail* dashboard to locate a credit for $423.00. Instead of visually searching row by row for the credit, sort the *Amount* column from lowest to highest.

Credits will be at the very top of the list of records because they appear as negative numbers in MAP. Debits appear as positive numbers in MAP, so they will appear after negative numbers.

**Technique:**
Hover your mouse in the *Distribution Amount* column header and then click the Ascending triangle.

**Results:**
The screen refreshes with the lowest numbers (credits) at the top of the list.

<table>
<thead>
<tr>
<th>Description</th>
<th>Distribution Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>OFFICE DEPOT #411</td>
<td>($423.00)</td>
</tr>
<tr>
<td>D J WALL-ST-JOURNAL</td>
<td>($69.27)</td>
</tr>
<tr>
<td>OFFICE DEPOT #1079</td>
<td>$3.20</td>
</tr>
<tr>
<td>OFFICE DEPOT #5910</td>
<td>$3.49</td>
</tr>
<tr>
<td>OFFICE DEPOT #1170</td>
<td>$15.12</td>
</tr>
<tr>
<td>D J WALL-ST-JOURNAL</td>
<td>$21.59</td>
</tr>
</tbody>
</table>

**Sorting with a Menu - ** Descending (Z-A or highest number to lowest number)

**Situation:**
You have run the EBO AP Expenditure Detail dashboard to locate a payment to the Xerox Corporation. Sort the *Supplier* column from highest to lowest (Z-A) to bring the record of the Xerox payment to the top of the list.

**Technique:**
1. Right-click in the Supplier column header.
2. Choose *Sort Column* from the menu.
3. From the expanded menu, choose *Sort Descending*.

**Results:**
The screen refreshes with the Xerox payment at the top of the list.

- Note: Both the icon and menu techniques work for both ascending and descending sorts.
Hiding, Excluding, and Retrieving a Hidden Column

- You can remove entire columns that you do not need.
- You can retrieve columns that were previously excluded, or were never on the display.

Excluding a Column

1. After retrieving your results, right-click within the heading of the column you want to remove.
2. Click Exclude column.
3. The column will no longer be displayed in the report.

Including a Column

1. Right-click within a column that will be immediately to the left of the column you are including.
2. Click Include column.
3. From the expanded menu, choose the column you want to include.

Hiding a Column

1. Right-click within a column that you want to permanently remove from the results.
2. Click Hide column.
3. The column will no longer be displayed in the report, and will not be displayed in the list of columns if you try to bring it back with Include column. To retrieve a hidden column, you will need to click Reset > Reset to Default Values.