

OHIO CHECKBOOK – ERIE COUNTY

HOW TO FILTER SPECIFIC INFORMATION

FILTERS Menu

ADD NEW FILTER drop-down menu to select corresponding filter

The screenshot shows the 'Filters' panel on the left side of the application. It includes a 'Checkbook' button, a 'FILTERED BY' section with 'Filters', 'Columns', and 'Aggregates', and a 'Visualizations' button. The 'Filters' panel has a 'Clear' button, a 'SEARCH ACROSS ALL DATA' search bar, and an 'Add New Filter' dropdown menu. A red box highlights the 'Add New Filter' dropdown, and a red arrow points from it to a list of filterable fields on the right. The list of fields includes: Amount (\$), Check Number, Department Code, Department Description, Expense Account, Expense Account Category, Expense Account Codes, Expense Account Description, Fiscal Year, Fund Code, Fund Description, Period, Program Code, Program Description, Transaction Date, Transaction Id, Transaction Line, Vendor City, Vendor Name, Vendor Number, Vendor State, and Vendor Zip.

Once the FILTER is selected, you can choose how the information is filtered by clicking on the blue header to select one of the options. Depending on the filter chosen, the drop-down menu options will differ.

The image shows two side-by-side screenshots of the filter options. The left screenshot shows the 'AMOUNT (\$) IS EQUAL TO' filter with a dropdown menu that includes options: equal to, not, at least, at most, blank, and not blank. The right screenshot shows the 'EXPENSE ACCOUNT DESCRIPTION IS EQUAL TO' filter with a dropdown menu that includes options: contains, equal to, not, blank, and not blank. A red box highlights the 'EXPENSE ACCOUNT DESCRIPTION IS EQUAL TO' filter, and a red arrow points from it to the 'contains' option in the dropdown menu.

Clicking the Reset button on the top of the page will return the page to the default view.

The screenshot shows the top navigation bar with a 'Back' button, a 'Reset' button (highlighted with a red box), and a search bar with the text 'Search in table'.

COLUMNS Menu

The Columns menu on the left allows you to choose the information you want displayed in the bottom table and how the information is sorted.



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Checkbook

FILTERED BY

All

Filters

Columns

Aggregates

Visualizations

Columns

Sort A-Z

Amount (\$)

✓

Check Number

Department Code

Department Description

✓

Expense Account

Expense Account Category

Expense Account Codes

Expense Account Description

✓

Fiscal Year

Fund Code

Fund Description

Period

2013

Program Code

Program Description

Transaction Date

✓

Transaction Id

Transaction Line

Vendor City

Vendor Name

✓

Vendor Number

Vendor State

Vendor Zip

Sort A-Z

Sort Z-A

Sort by order of the report

Clicking the Reset button on the top of the page will return the page to the default view.

Back

Reset

Search in table

AGGREGATES Menu

The Aggregates menu on the left allows you to sort groupings of like items. First, choose which type (amount, check number, department code, etc.), then choose how to sort (A-Z, Z-A, 0-9, 9-0) and what information you want shown (total items, total count, average, minimum, maximum, etc.). The information below the *Recalculate* button will update with the information selected from the drop-down options.



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Checkbook

FILTERED BY All

Filters

Columns

Aggregates

Visualizations

Aggregates

Amount (\$)

Check Number

Department Code

Department Description

Expense Account

Expense Account Category

Expense Account Codes

Expense Account Description

Fiscal Year

Fund Code

Fund Description

Period

Program Code

Program Description

Transaction Date

Transaction Id

Transaction Line

Vendor City

Vendor Name

Vendor Number

Vendor State

Vendor Zip

Amount (\$)

Sort 9-0

Show Count

Recalculate

100 to 1 k	79288
10 to 100	71375
1 k to 10 k	31855
1 to 10	10533
10 k to 100 k	6349
100 k to 1 M	1078
0 to 1	405
1 M to 10 M	75

Show Count

Show Total

Show Avg

Show Min

Show Max

This information will update once the menu options are selected.

Example shown: There are 79,288 items in the \$100 - \$1,000 range. Seventy-five items in the \$1M - \$10M range.