

OHIO CHECKBOOK – ERIE COUNTY

HOW TO FILTER SPECIFIC INFORMATION

There is a search bar located at the top of the OpenGov page. This allows you to search for any text (words and dollar amounts) in the tables. If you are searching for a specific vendor or dollar amount, this is the easiest way to search.



On the left-hand side of the page, there are menu options to further filter information.

FILTERS Menu

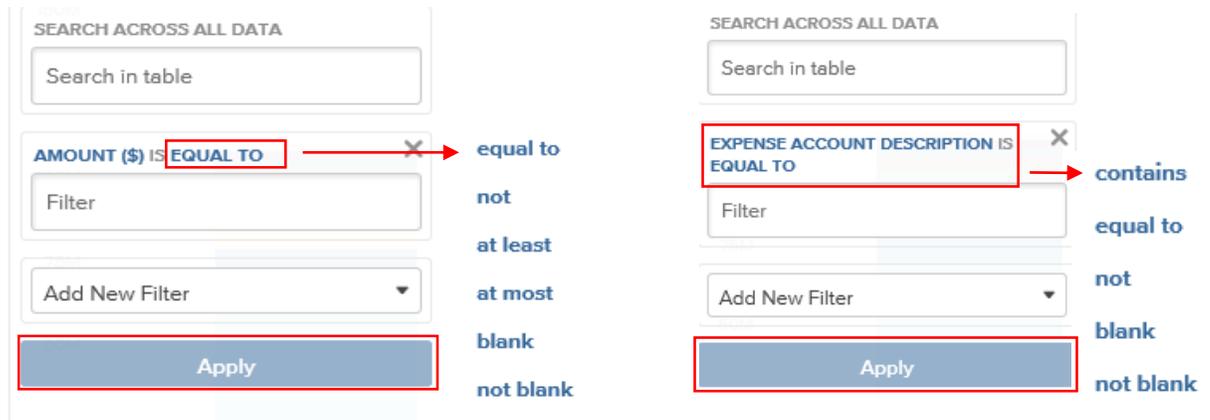
ADD NEW FILTER drop-down menu to select corresponding filter

A screenshot of the 'Filters' menu and the list of filterable fields. On the left, the 'Filters' menu is open, showing options like 'Checkbook', 'Visualizations', and 'Filters'. The 'Filters' option is highlighted with a red box. In the center, the 'Filters' panel is visible, showing a search bar and an 'Add New Filter' dropdown menu, also highlighted with a red box. On the right, a list of filterable fields is shown, including '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'. A red arrow points from the 'Add New Filter' dropdown menu to the list of filterable fields.

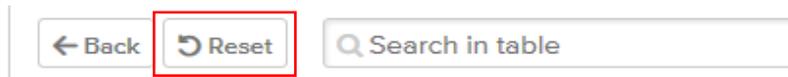
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Once the FILTER is selected, you can choose how the information is filtered by clicking on the **blue header** to select one of the options. Depending on the filter chosen, the drop-down menu options will differ. Input the search criteria that you wish to search for in the Filter box and click Apply.

The filtered information will appear in the table and will be reflected in the graph on top of the page.

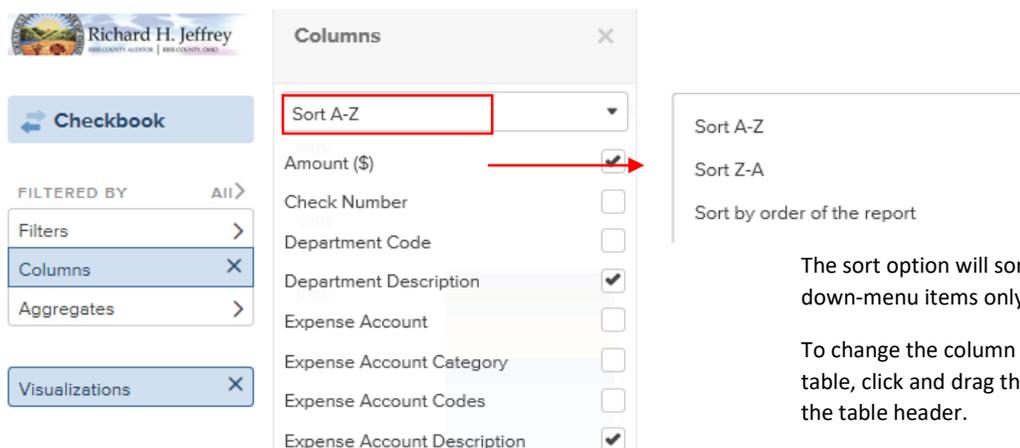


Clicking the Reset button on the top of the page will return the page to the default view.



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. Items that are check-marked are already displayed in the table.

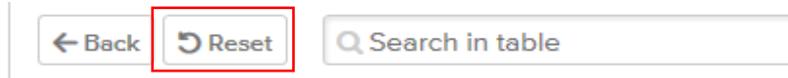


The sort option will sort the drop-down-menu items only.

To change the column order in the table, click and drag the item along the table header.

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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.

The screenshot shows the 'Aggregates' menu in the Ohio Checkbook application. On the left is a sidebar with navigation options: 'Checkbook', 'FILTERED BY' (with 'All' selected), 'Filters', 'Columns', 'Aggregates' (highlighted), and 'Visualizations'. The main area is titled 'Aggregates' and contains a list of filterable fields: 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. To the right of these fields are three dropdown menus: 'Amount (\$)', 'Sort 9-0', and 'Show Count'. Below these is a 'Recalculate' button. A table displays the results of the aggregation, with a red box highlighting the '100 to 1 k' row. To the right of the table are buttons for 'Show Count', 'Show Total', 'Show Avg', 'Show Min', and 'Show Max'. A red arrow points from the 'Show Count' button to the '79288' value in the table. Another red arrow points from the table to a text box explaining that the information updates based on menu selections. A third red arrow points from the table to another text box providing an example: 'Example shown: There are 79,288 items in the \$100 - \$1,000 range. Seventy-five items in the \$1M - \$10M range.' A final red arrow points from the table to a text box explaining that the bottom box will populate with all the corresponding information (Department Description, Vendor Name, etc.) if a different category is chosen.

Amount Range	Count
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

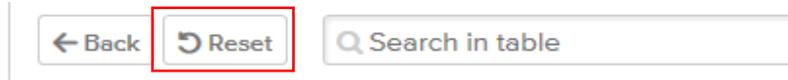
This information will update once the menu options are selected.

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

If a different category is chosen to sort, the bottom box will populate with all the corresponding information (Department Description will display all the department names, Vendor Name will display all the vendor names, etc).

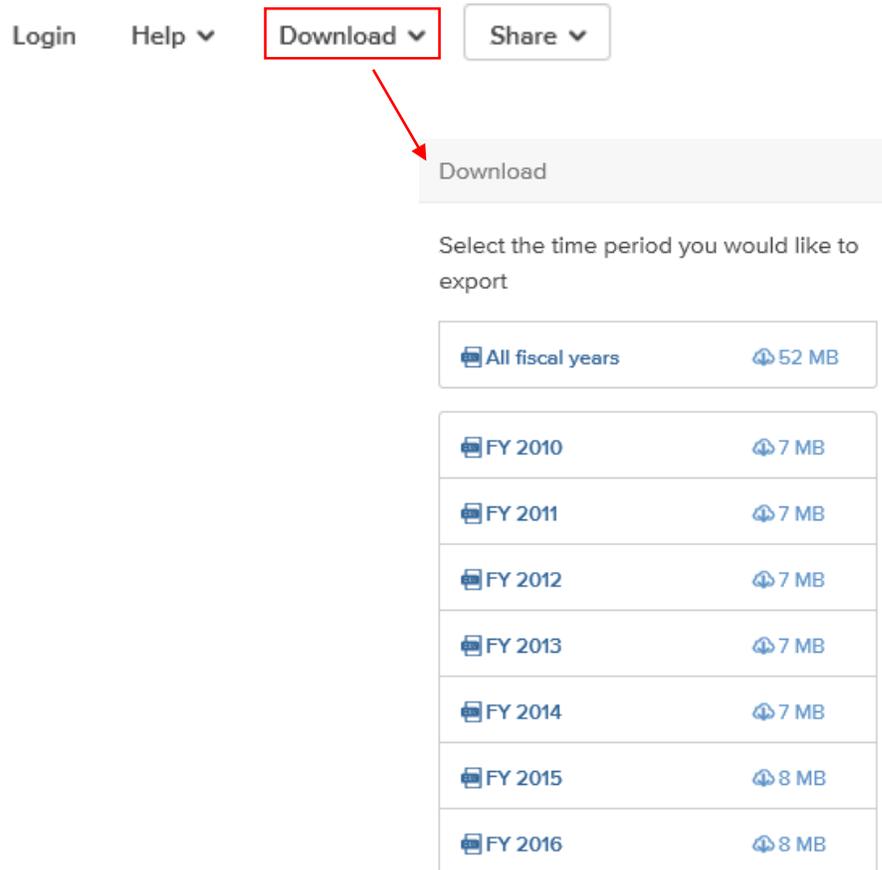
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HOW TO DOWNLOAD INFORMATION

In the upper right-hand corner of the Erie County Checkbook page, there is a *Download* drop-down menu.



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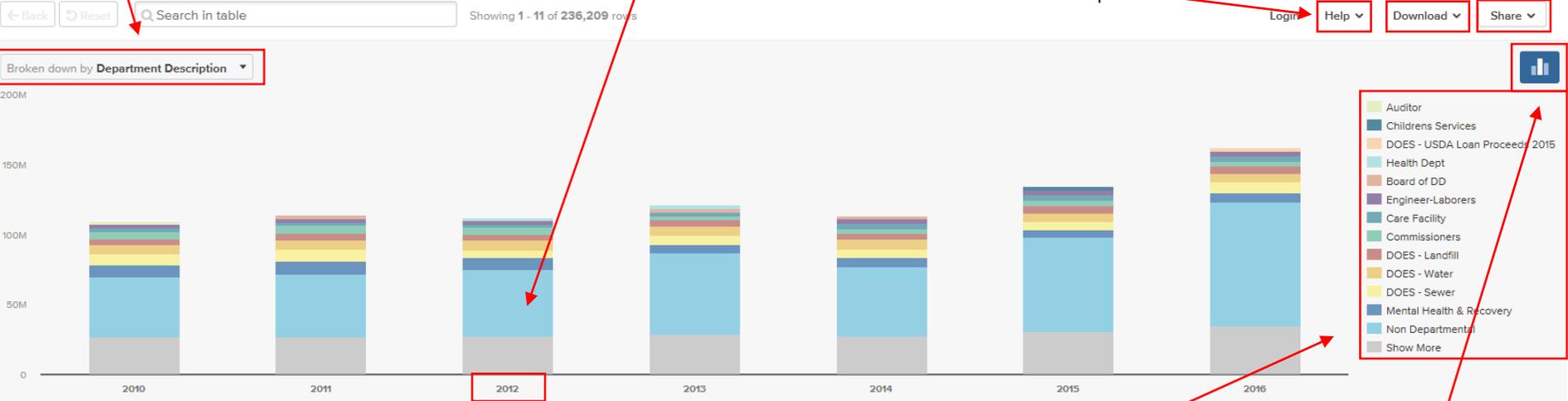
This drop-down menu allows you to select how the information is sorted. The menu allows you to select any column header from the bottom graph.

Hovering over a segment on the graph will display the department name, dollar amount spent during corresponding time and the percentage of funds spent by the department during that time.

Share menu allows the user to share a link to their search results via social media and email.

Download menu allows the user to export data (by year) to an Excel file.

Help menu can provide additional tips.



By clicking on one of the years, it will filter items from that year only. The graph will then display the information for each month of the specified year.

The department legend can also be used to select an individual department. Once a department is selected, the graph and bottom grid will display only items paid by the corresponding department.

This button allows you to change the type of the graph: horizontal stacked chart, treemap, pie chart and bar graph.

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Clicking on any header drop-down button will allow you to filter that header's information.

Clicking on any one cell (regardless of column) will give you the option to search by that same cell (Non Departmental will search for all items Non Departmental, Prudential Insurance will display all items with Prudential Insurance, etc).

Choosing a \$ amount to filter allows you three options: at most x amount, equal to x amount and at least x amount.

Transaction Date	Vendor Name	Department Description	Expense Account Description	Amount (\$)
12/31/2015	OAK HOUSE	Mental Health & Recovery	MHRB-Gen Oper-Psychological&Counsel	2,585.99
12/29/2015	US DEPT OF EDUCATION	Non Departmental	Court Costs	187.84
12/29/2015	US DEPT OF EDUCATION	Non Departmental	Court Costs	214.47
12/29/2015	CAMPBELL MUNICIPAL COURT	Non Departmental	Court Costs	254.05

The columns can be arranged in any order. Simply, click and drag to where you want the column to be relocated.

Clicking anywhere in the table will give you the option of searching data in the corresponding column. *View Check Details* is also an option, regardless of where you click the cursor. If selected, it will generate a reproduction of the check. All the information regarding the payment will be summarized in the check details screen.