Sharing Filters

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Sharing filters is an easy process in PCS. Once the custom filter is created, clicking on it in the dashboard will offer the user the possibility of sharing it:

Clicking on the "Share" button a new pop up window shows up offering a dropdown list of company users to choose from. The custom filter can be shared with more than one user.

Please notice that the filters already in the system (My unresolved, all, other should react, etc.) cannot be edited, shared or deleted. However the user can hide them in the Personal Settings area.

Once the user has shared the custom filter it is automatically available to the shared recipients at the bottom of the filters area (similar to the image above). Criteria is also available to show how the filter has been created.

However, the user recipients won't see the buttons to edit, share or delete the filter and therefore cannot perform any action on them. Of course, as the user creator they can hide in their Personal Settings this new filter. They can also drag it up and down in the filter column like any other filter.

The user that created the filter can change at any time the criteria, the name of the filter, the sharing party list or directly delete the filter. Any of this actions is synchronized for the rest of the users.

For example, in the above figure, if the filter user creator decides to further filter out the results for only the international train 49120, the two dossiers under that criteria will show up only for all the users that have access to the filter.

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