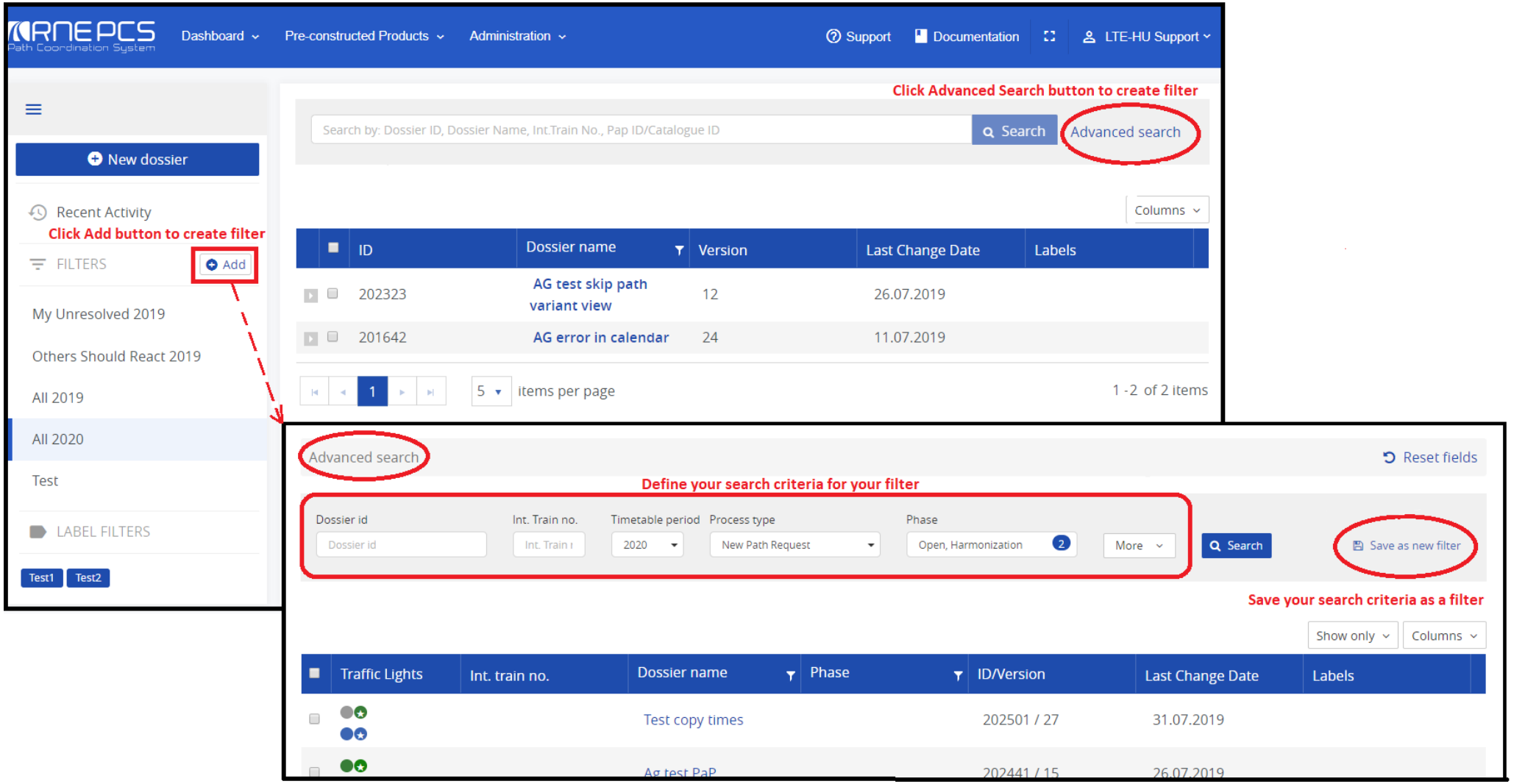
Filters

Content

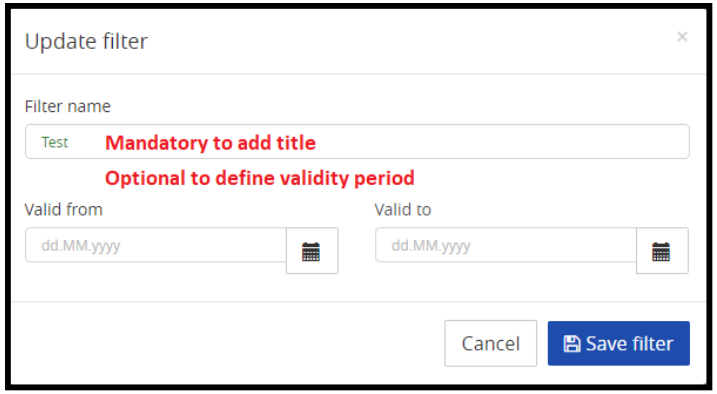
Filters are excellent storing functionality in the system. It allows users to organize dossiers according to specified criteria. So we can say that the filters are pre-defined and saved search criteria. Some of the filters are built-in to the dashboard by default such as "Recent activity", My Unresolved 2019" and "Others should react", and so on.

There are two ways to create filters: use the add button at the FILTER section in the menu or go to "advanced search" and save the search criteria as a new filter.

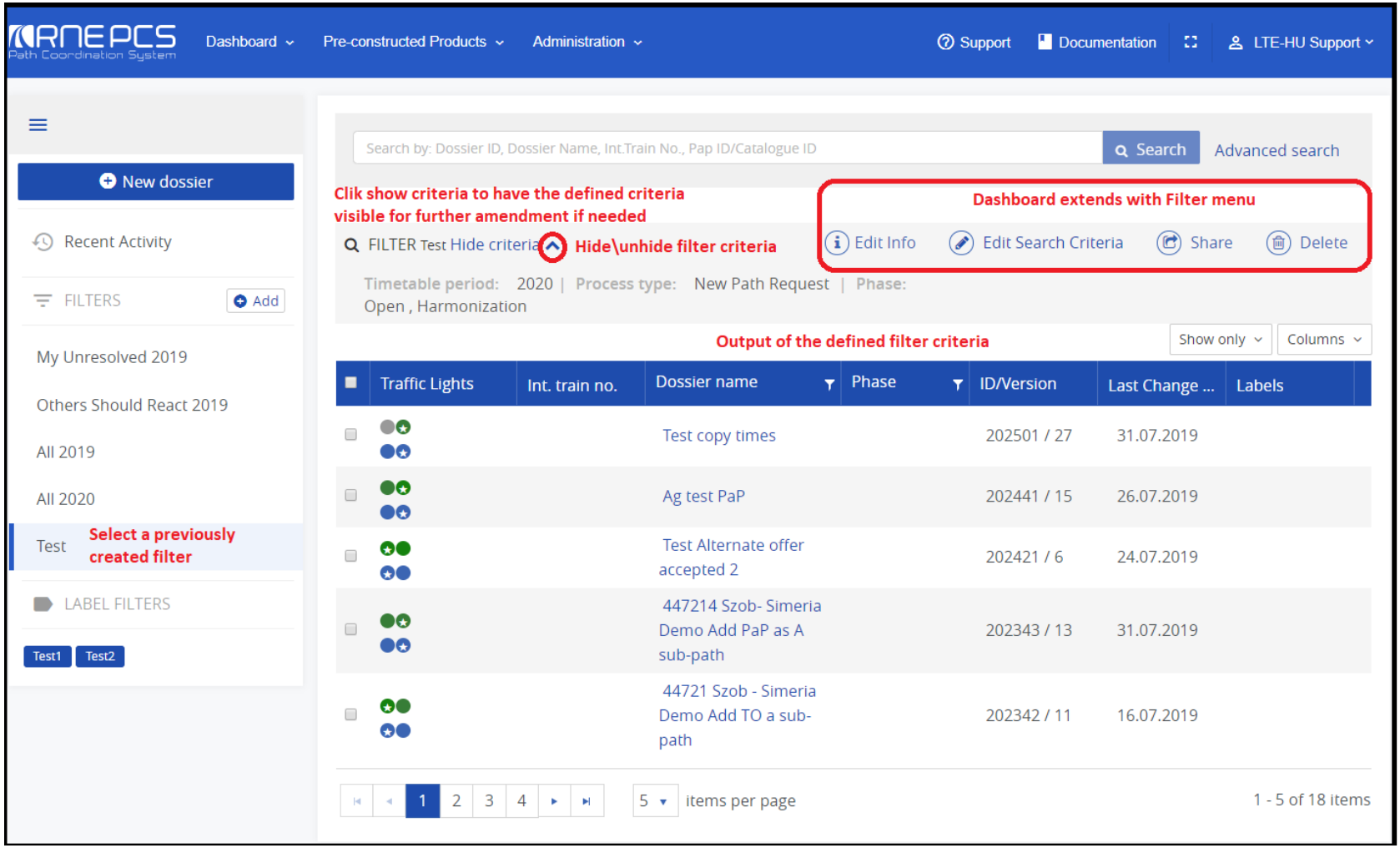


To get more information on how the search functionality works, please visit **Search and advanced search**" documentation.

When using the "Add" button at the Filter section, it opens the advanced search window. After defining the search criteria save the output as a new filter. Then the "Update filter" wizard window opens where we need to enter the title of your filter and or determine the validity period for the filter if necessary, and finally save our action.



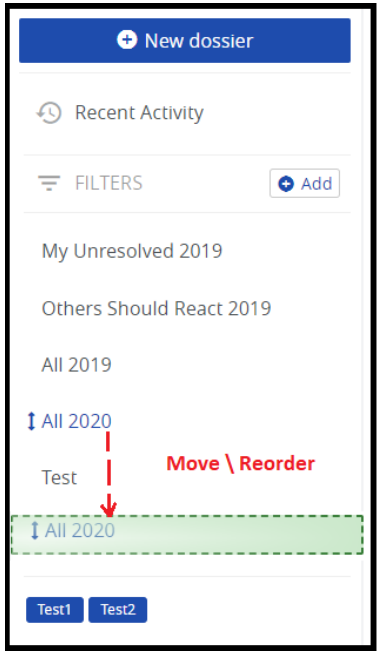
It appears on the dashboard between the built-in filters in the menu. If no validity period is set, the filter will be always visible. However, if we want to make the filter visible only for a certain period it must be defined and the filter will become visible on the dashboard only during the defined days. Later, If you don't know or don't remember what are the search criteria of the filter, you can click on the "Show criteria" link and the system will show how the criteria were set.



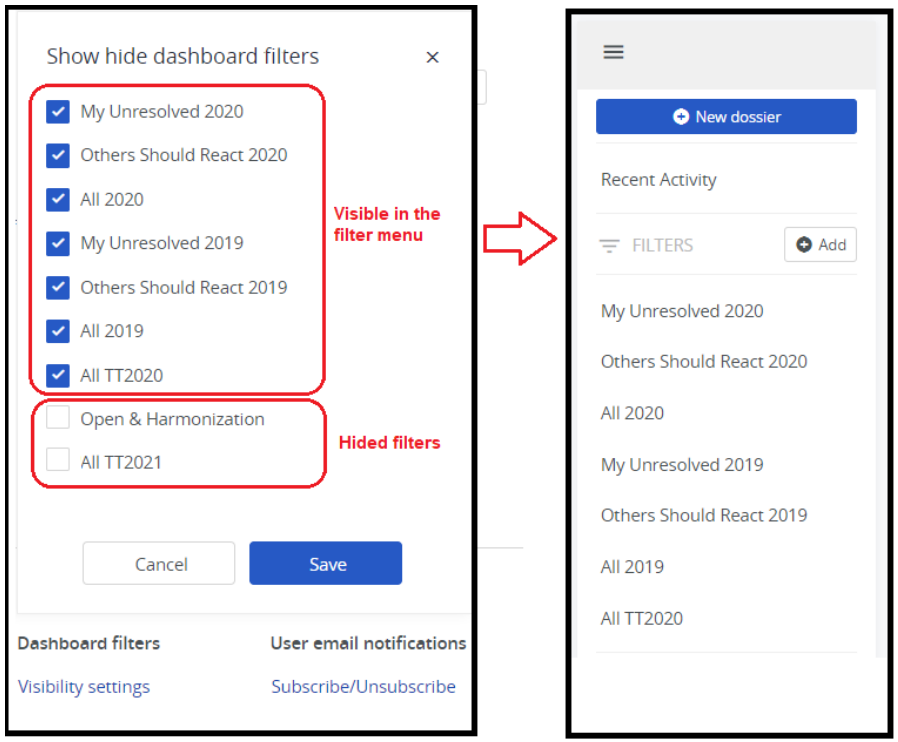
When creating own personal filters it brings bigger freedom for the users than the default ones: they can be modified, shared and deleted. To access these activities the pre-condition is to have a filter created. Select a previously created filter and after the dashboard extends with a filter menu where we can customize and manage our filter in several ways:

- **Edit info:** change the title and or the validity period
- **Edit search criteria:** resetting the previously defined criteria and adding new criteria to our filter
- **Share:** share our filter with colleagues within the company or group of a colleague
- **Delete:** delete our filter. Note: if a filter has been shared by someone then unable to modify the filter because we are not the creator (owner) of the filer!

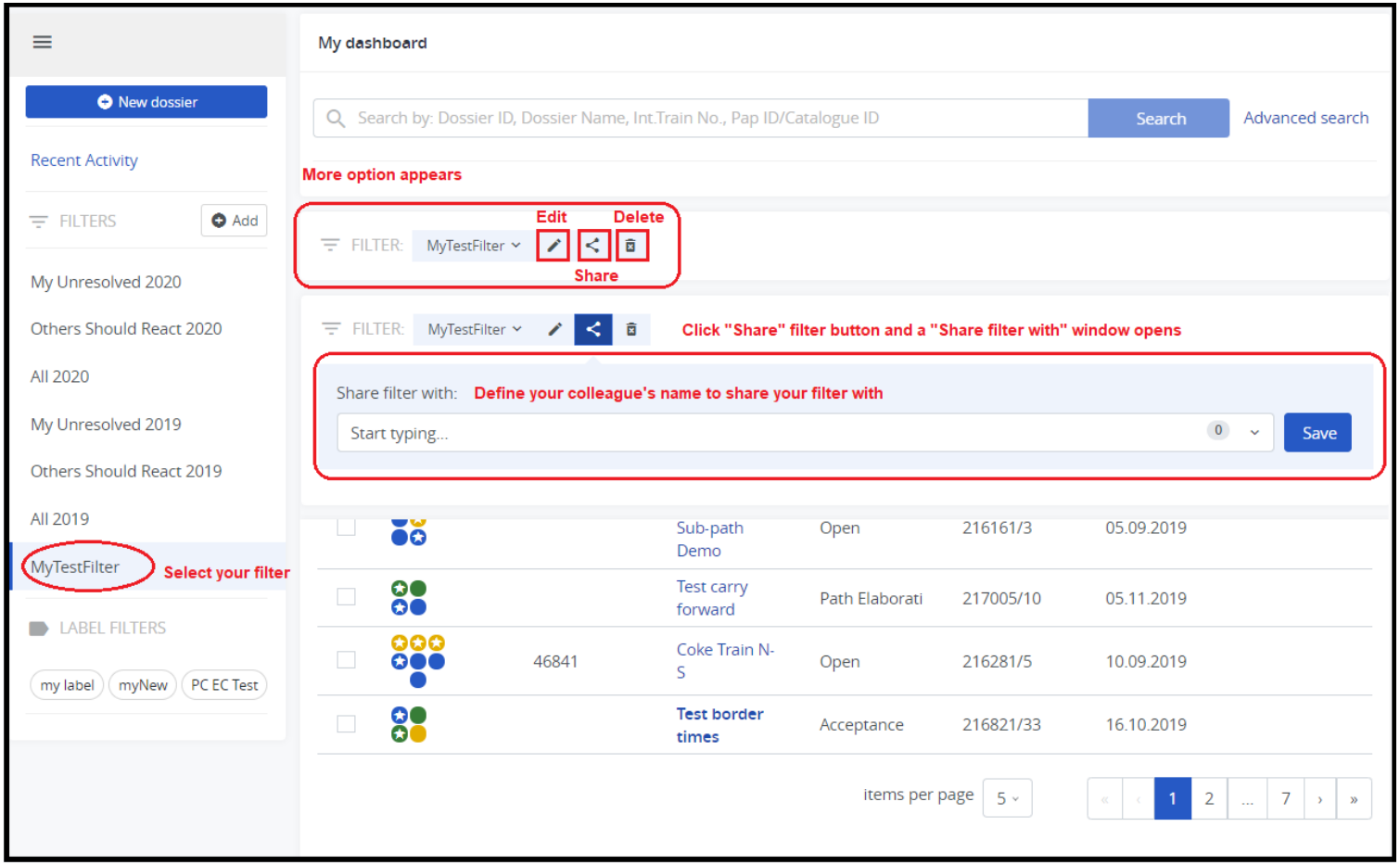
It is possible to reorder them using its drag & drop function.



Please note that default filters cannot be deleted, although they can be hidden. In this way, they will not show up on your dashboard just go to "**settings** - **personal settings**" and change their visibility settings by ticking or unticking its checkbox.



PCS gives flexibility to the users and personal created filters can be shared with your colleagues within the agency. To share your own filter you need to select one and after the sharing option will be visible.



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