

## Filters

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Filters are important for storing pre-defined search criteria. Some of them are already by default in the system such as My Unresolved, Others should react, and so on.

To create a new filter there are two possibilities: use the add filter option that will lead you to the advanced search, or go directly to advanced search. There, the search criteria can be saved as a filter.

On the Advanced search page we can define our criteria (for further details please check the video called "search").

After the criteria is set, click on the button "save as new filter".

A pop up window asking for the name of the filter will show up. The filter will be saved in the dashboard.

Below the name there is also the possibility of establishing a validity period for the filter. These fields are optional. 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.

After you created the filter is created we will find it in the dashboard with the rest of the filters.

Clicking on the filter will give us a result based on its search criteria. If you don't know or don't remember what are the search criteria of the filter you can click on "Show criteria" link and the system will show how the criteria was conformed.

The customized filters give a bigger freedom than the default ones: They can be edited, shared and deleted.

Choosing the edit option, the system will lead you again to the advanced settings area, where the search criteria and update of the filter can be performed.

Please note that default filters cannot be deleted, although they can be hidden. In this way they will not show up in your dashboard.

If you created a filter that you find useful for other users of your agency, you have the possibility to share the filter with them. Just select the filter and click on the share button. In the pop up window you can select the users or teams that you would like to share the filter with. Of course it is also possible to remove employees from the sharing list.

Filters can be managed in several ways. They can be reordered using its drag & drop function.

It is also possible to hide a filter: just go to personal settings and change their visibility settings.

After hiding one or more filters we can see the changes on the dashboard.

Finally, going back to the personal settings, it is possible to change the Default Dashboard View. For example choosing the user defined filter we have created. Clicking in the upper logo will take us to the new default view. Every time that we login into the system this will be our default view.

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