Managing Employee Filters

- Filters are shared across tabs; for example, an **Employee Filter** created in **Individual Hours** can also be used in the **Request Manager**
- To use the search function, input text (including numbers, where applicable) into the **Search** field and press **Enter** on the keyboard; to clear the search, press the small red 'X' to the right of the **Search** field
- When selecting filter criteria, using the **Search** box locates all matching rows (e.g. typing 'Mar' in the **Employee ID** search would include employees 'Mary Smith', 'Mark Wilson', 'Robert Dumar', etc.)
- Multiple filters may be used within a single rule (e.g. an **Employee Filter** that filters based on **Job Code** and **Employee ID**)

Employee Filters (filter visible employees)

Create a new filter

1. Navigate to a tab that uses employee filters, such as **Individual Hours**, **Group Hours**, or **Request Manager**
2. Click **Employee Filter**
3. Click a filter type, such as **Job Code**, **Employee ID**, etc.
    a. **Employee ID** filters enable selection or exclusion of specific employees (e.g. only view Mary Smith and Mark Wilson, or exclude Robert Dumar)
    b. **Job Code** filters enable selection or exclusion based on type of position (e.g. *TCHR ART ELEM*, *MAINTENANCE I*, *TECH SVCS SPECIALIST*, etc.)
4. Select **Include** to create a filter to *only* show the indicated type of records, or **exclude** to *block* the indicated type of records from showing
5. Click **Select**
    a. Click **Deselect All** to clear the existing selection
    b. Click the checkbox next to records to include in the filter – use the **Search** box in the upper-right corner to quickly locate individual records
    c. Once all items have been selected, press **Filter**
6. To add additional criteria to the filter, repeat steps **3** through **5**
7. To save the filter, press **Save As**
    a. Input a name for the filter in the **Name** field
    b. Click the **Default** box to cause this filter to automatically run *on the screen it was created on* (e.g. a default filter on the **Individual Hours** does not also automatically run on the **Request Manager**)
    c. Press **Save**
8. Click **Filter** to apply the filter

Load a saved filter (user must have previously saved a custom filter, via **Create a new filter** above)

1. Navigate to a tab that uses employee filters, such as **Individual Hours**, **Group Hours**, or **Request Manager**
2. Click **Employee Filter**
3. Press **Load**
4. Select a filter
5. Press **Filter**

Modify an existing filter (user must have loaded a saved filter, or be working within a default filter)

1. Click **Employee Filter**
2. Click a filter type, such as **Job Code**, **Employee ID**, etc.
3. Click **Select**
    a. Click the empty checkbox next to records to add to the filter – use the **Search** box in the upper-right corner to quickly locate individual records
    b. Click the checked-off checkbox next to records to remove from the filter
    c. Once all items have been selected, press **Filter**
4. Press **Save As**
    a. Click the filter to replace/update, or input a name in the **Name** field to save as a new filter
    b. Click the **Default** box to cause this filter to automatically run *on the screen it was created on* (e.g. a default filter on the **Individual Hours** does not also automatically run on the **Request Manager**)

c. Press **Save**
d. If this filter is replacing an existing filter, a message indicating that the previous filter will be overwritten appears – click **Ok**

5. Click **Filter** to apply the filter

Remove an applied filter (an active filter must be in place; **Employee Filter** will be highlighted blue)

1. Click **Employee Filter**
2. Click **Reset All**
3. Click **Filter**