Managing Filters

- Saved employee filters are shared across tabs; for example, an **Employee Filter** created in **Individual Hours** can also be used in the **Request Manager** (other filters, such as Job Code filters, cannot be saved)
- 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 employees who meet specific criteria)

- Employee filters have the option to apply as a **Default**. The **Default** box indicates that the filter will *always* apply on the selected screen – only use this if this filter is intended to always be active.

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*)
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. 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. Press **Save**

   c. When replacing an existing filter, a message indicating that the prior filter will be overwritten appears – click **Ok**
5. Click **Filter** to apply the filter

Clear current filter
1. Click **Employee Filter**
2. Click **Reset All**
3. Click **Filter**

Job Code Filter (filter segments by job code)
- This function filters *segments* by job code, so that only hours logged in the selected job code(s) will appear
- Job code filters are only usable in **Individual Hours** and **Group Hours**
- Use this function with job codes *3 – Missing Hours* and *310 – Sick Leave* to help locate employees who are short hours
- In order to find *employees* who have one (or more) of the specified job codes, use an **Employee Filter** instead

1. Click **Job Code Filter**
2. Click **Enable Selection**
3. Select one (or more) job codes
4. Click **Filter**
5. The data will now be filtered so that only segments with the specific job code(s) is/are visible
6. To cancel this filter, click **Job Code Filter**, and then click **Disable**

Cost Code Filter (filter segments by cost code)
- This function allows schools to locate substitutes who worked at their cost center
- For best results, ensure that no other filters are applied
- This function also allows searching for other cost codes, such as PLACE site coverage

1. Click **Cost Code Filter**
2. In the **Filter by** field, change the selection from **Cost Code Rule** to **Cost Code Group**
3. Use the search field to locate the desired school site and click on that site
4. Click **Filter**
5. The data will now be filtered so that only segments with the specific cost code is visible
6. To cancel this filter, click **Cost Code Filter**, and then click **Disable**

Exception Filter (filter segments by specific exception)
- This function allows users to locate segments with specific exceptions (e.g. 'Manager Approval', 'Missed Punch', etc.)
- This function allows managers to easily locate segments that still require action for payroll processing
- Exception filters can be used alongside other filters, such as **Employee Filters**, to find more specific data

1. Click **Exception Filter**
2. Select one (or more) exception to filter by
   a. Alternatively, select **Required for close week** to show all segments that must have action taken for payroll processing
3. Click **Filter**
4. The data will now be filtered so that only segments meeting the selected exception criteria will be displayed
5. To cancel this filter, click **Exception Filter**
   a. Click **Restore default**
   b. Click **Filter** to re-apply the default exception filter