

# Managing\_custom\_data\_table\_view\_filters\_Content\_v1

## Add a filter to a custom data table view

To add filters to a custom data table view:

1. Select your custom data table view, and click on the edit this data table view button.



2. Click the **Add a Filter to this View** link to add a filter to this custom data table view.

### Data Table View Applicant

**Name** Applicant

**Data** Animals

**Table**

**Sort by** Animals: Name

**Sort Order** Ascending

**Fields** Applicant, Name, Status, Species, Sex, Last Updated

[Add or Remove Fields from this View](#)

**Filters** No filters.

[Add a Filter to this View](#)

**Shared** No

DeleteEdit

Done

3. Make a selection in the **Fields** drop-down menu.
4. Select equals or not equal in the **Operation** drop-down menu.
5. Select **Criteria**.

6. Click **Save Filter**.

**Add a Filter for Custom Report**

Field \* Submitted Forms: Assigned To

Operation \* Equals


Criteria "Peters, Michelle"

When filtering strings you can use multiple values (example: "this", "that") and all records that match any of the criteria will be displayed.

You can also use the following special values:

"rg:today" is today's date for comparisons  
"rg:contactID" is your personal Contact ID


Cancel Save View Filter ☐ Add Another

 The example above is what it would look like to create a custom filter for all submitted forms assigned to a specific volunteer.

This custom view is now available to quickly select in the data table as Views: Assigned to Michelle






**Submitted Online Forms**

« [Online Forms](#)

 Submit a Form

**Current View: Assigned to Michelle**

Actions... Views: Assigned to Michelle

	<u>Form ID</u>	<u>Form</u>
    	<a href="#">276821</a>	<a href="#">Adoption Application</a>

## Edit a data table view filter

You can edit a filter to change the operation, criteria, or even the field itself.

Edit icon: 

to edit a data table view filter:

1. Click the **Edit this filter** icon next to the filter you want to modify.
2. Select the Field from the **Fields** drop-down menu.
3. Select the Operation in the **Operation** drop-down menu.
4. Enter or select the **Criteria** status.
5. Click **Save View Filter**.

## Remove a filter from a data table view

To remove a filter from a view click the **Delete this filter** button next to the filter you want to remove.

Delete icon: 