


Managing custom data table view filters

Filters are one of the primary features of data tables. By using filters, you can quickly find the data you are looking for. Filters specify the criteria to use when deciding which rows of data to display in a data table. For example, you might add a filter to an **Animals** data table view so only animals with a status of Available are displayed, or animals that were adopted in a certain date range.



Where do I find it?

You can add and remove filters on a custom data table view by selecting the custom data table view in the **Views** drop down, clicking the **Edit this data table view button** , and then looking in the **Filters** section.

On this page:

- [Add a filter to a custom data table view](#)
- [Edit a data table view filter](#)
- [Remove a filter from a data table view](#)

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 Animals: Name

by

Sort Ascending

Order

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](#) 



<input type="checkbox"/> All	Form ID	Form
<input type="checkbox"/>    	276821	Adoption Application

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: 

Popular Questions

Topics:

- [views](#)

No questions found.

Have a question about this topic?