

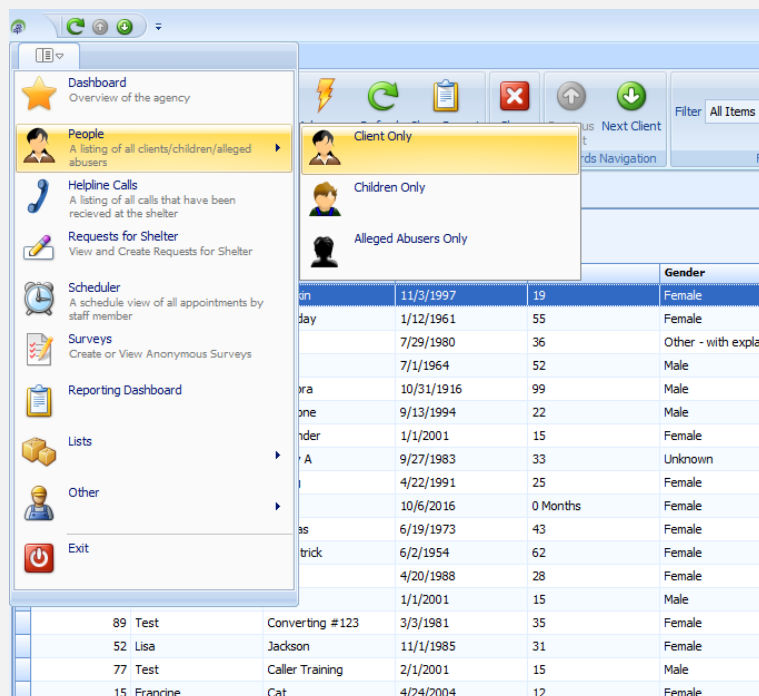
How to Create Simple Filters in List Views

List views show complete lists of different objects in the software that can be sorted and filtered to display more specific information.

This guide will explain how to apply filters to list views.

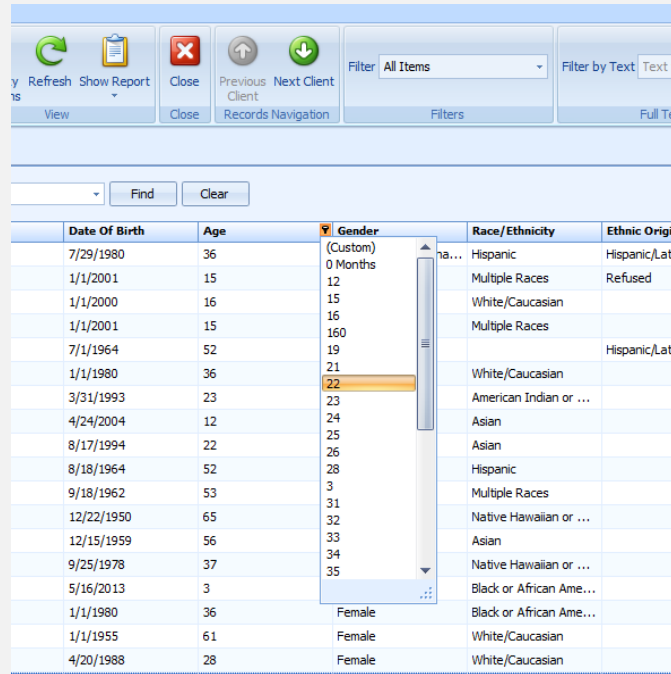
*Please note that the terminology may vary between implementations. One agency may call Services Activity Session, while another may call them Client Services.

- 1) To start, click on the Navigation Button in the top left corner to access the available lists. To view a list of clients, hover over People and select Client Only.

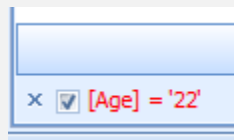


Name	Date of Birth	Age	Gender	
an	11/3/1997	19	Female	
Day	1/12/1961	55	Female	
	7/29/1980	36	Other - with explan	
	7/1/1964	52	Male	
ra	10/31/1916	99	Male	
one	9/13/1994	22	Male	
nder	1/1/2001	15	Female	
A	9/27/1983	33	Unknown	
	4/22/1991	25	Female	
	10/6/2016	0 Months	Female	
as	6/19/1973	43	Female	
trick	6/2/1954	62	Female	
	4/20/1988	28	Female	
	1/1/2001	15	Male	
89 Test	Converting #123	3/3/1981	35	Female
52 Lisa	Jackson	11/1/1985	31	Female
77 Test	Caller Training	2/1/2001	15	Male
15 Francine	Cat	4/24/2004	12	Female

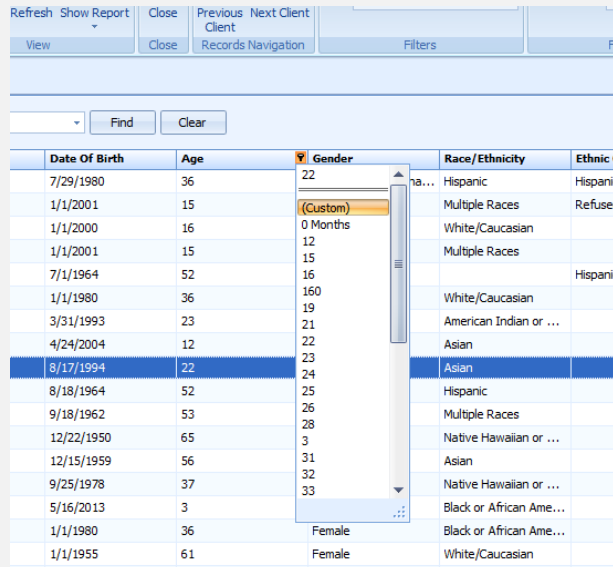
- 2) Apply a simple filter by highlighting a column, then clicking on the symbol on the right side of the column heading.
- 3) Clicking the filter symbol will bring a list of all the values available for filtering. Choosing a value from the list will filter the entire list for entries with the chosen value.



- 4) Click the checkbox or the x in the bottom left corner to remove or deselect the filter.



- 5) Apply custom filters like “less than” or “greater than” by choosing (Custom) in the filter drop down selection.



The screenshot shows a data table with columns: Date Of Birth, Age, Gender, Race/Ethnicity, and Ethnic C. A dropdown menu is open over the Gender column, showing options: 22, (Custom), 0 Months, 12, 15, 16, 160, 19, 21, 22, 23, 24, 25, 26, 28, 3, 31, 32, 33, Female, and Female. The row with Date Of Birth 8/17/1994 and Age 22 is highlighted in blue.

Date Of Birth	Age	Gender	Race/Ethnicity	Ethnic C
7/29/1980	36	22	Hispanic	Hispanic
1/1/2001	15	(Custom)	Multiple Races	Refused
1/1/2000	16	0 Months	White/Caucasian	
1/1/2001	15	12	Multiple Races	
7/1/1964	52	15		Hispanic
1/1/1980	36	16	White/Caucasian	
3/31/1993	23	160	American Indian or ...	
4/24/2004	12	19	Asian	
8/17/1994	22	21	Asian	
8/18/1964	52	22	Hispanic	
9/18/1962	53	23	Multiple Races	
12/22/1950	65	24	Native Hawaiian or ...	
12/15/1959	56	25	Asian	
9/25/1978	37	26	Native Hawaiian or ...	
5/16/2013	3	28	Black or African Ame...	
1/1/1980	36	3	Black or African Ame...	
1/1/1955	61	31	White/Caucasian	

- 6) Choosing (Custom) will open the Custom AutoFilter window. Select the type of filter you would like to apply and the values the filter will apply to, then click OK.

