Contents

# Quick Reference Guide – Creating Filters for searches

This document will explain how to use the filters to create custom searches. Filters can be created from Tickets, Poles/Assets, and Steps. The steps to create filters are identical regardless of where it is being created from. This document has examples starting from each menu item, however the functionality is the same for all of them.

Creating Search Filters from Tickets

- Click on Tickets. This will load the Tickets of Interest list, which includes tickets the user has access to in the system that have been <u>updated within the last 30 days</u> up to 5000 at a time.
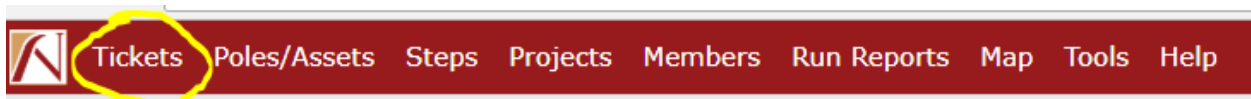

To use the system filters available to all users, click the down arrow next to the Search icon.
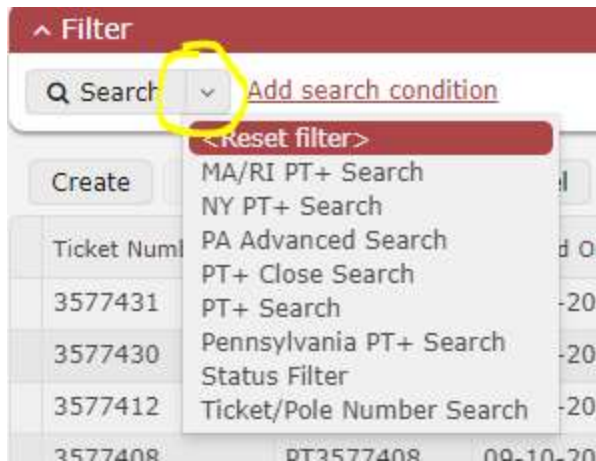
These will look familiar as some were queries in the old system.

- To search by Ticket Number or Pole Number, click the Ticket/Pole Number Search.
- To search by Ticket Status, click the Status Filter

Custom Searches can be created and saved with or without values. To start creating a custom filter, the filter must be reset. Click the down arrow next to Search and select Reset Filter.
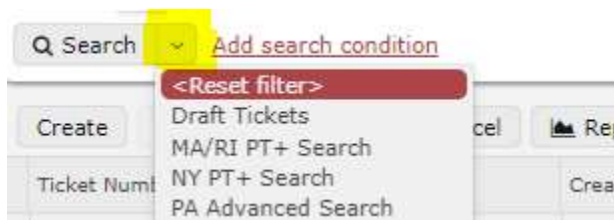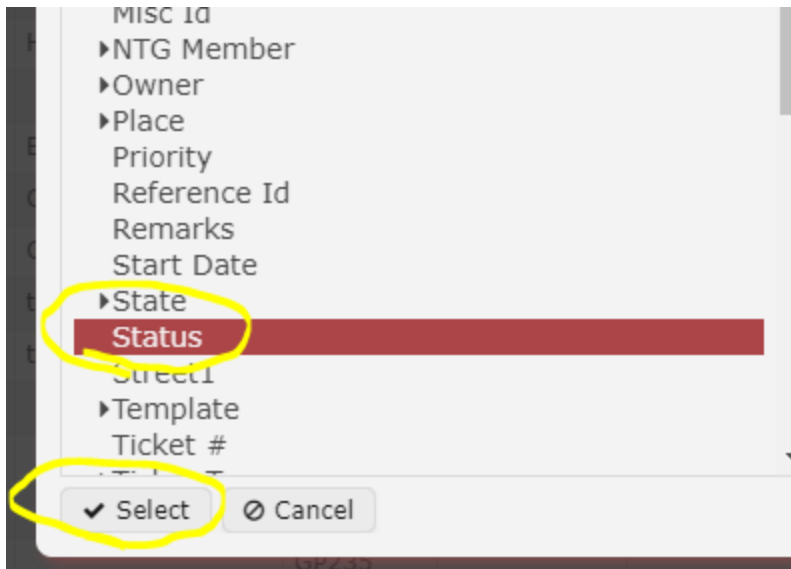

In the example below, this filter is created to show all open tickets, where member code UPC and UPC2 are the pole owners and the tickets were created this year.
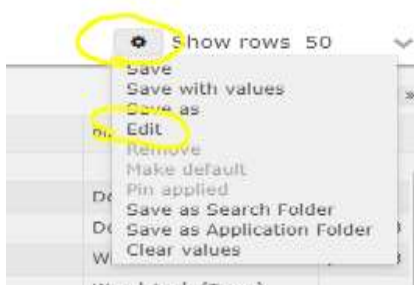
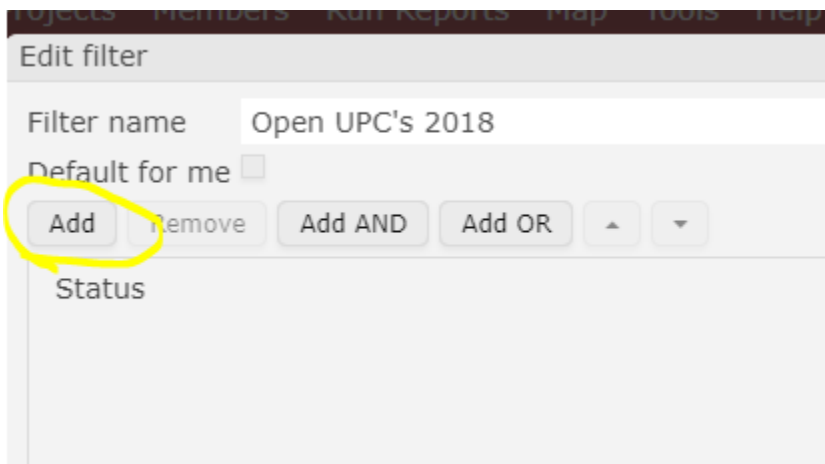- Click Add Search Condition
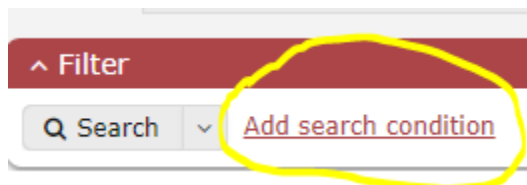
- First, select Status

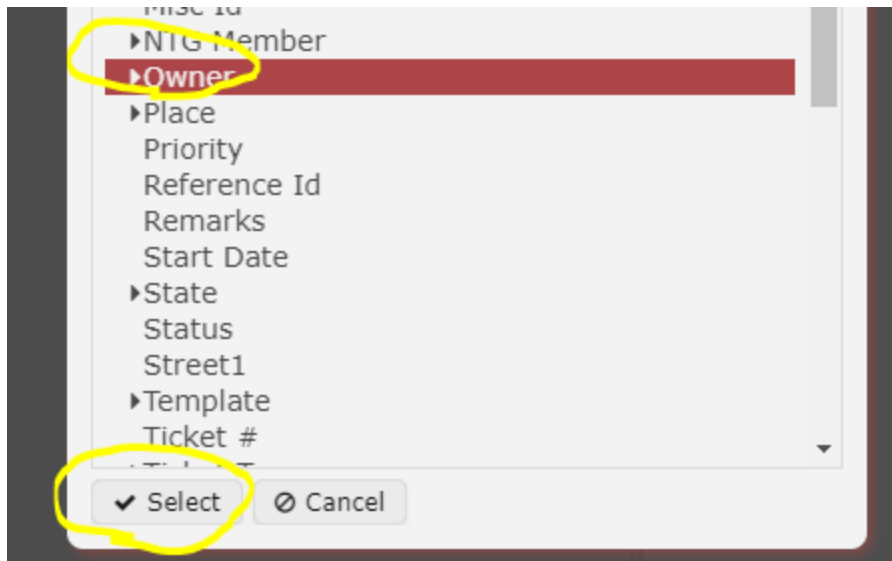Status will be added to the top above the Search icon.

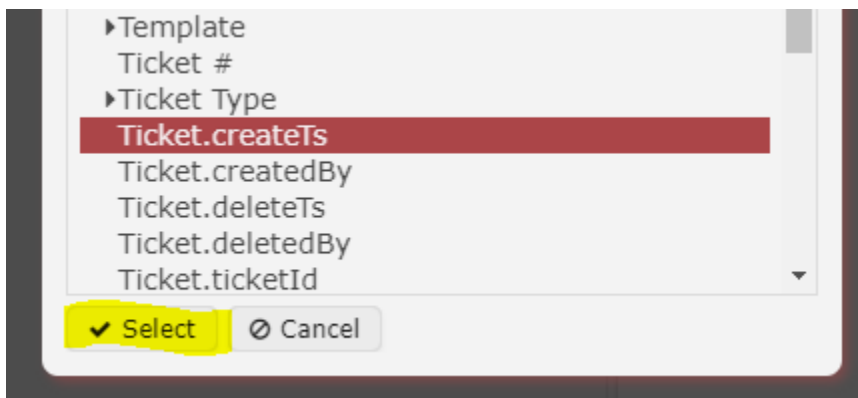- Click the action wheel icon to the right next to Show rows and select edit.

- The Edit Filter box will appear where the filter can be named, and additional filters added.
- Click Add to add another Filter

- Highlight Owner, the click Select

- Click Add again and select Ticket.createTs (for created on date)

The filter looks like the below. (3 fields have been added) Status, Owner, and Created On

- Click Ok.

- Update the parameters to include the values needed.


The highlighted operands can be changed as needed. To include more than one ticket status, the equal would need to be changed to 'in'.

Ticket. CreateTS was changed to include the dates >= (greater than or equal to) since this example was to include tickets created so far in 2018)

- Click the Search icon to see the results from this filter.

The filter can be saved with or without the values.

- Click back on the action wheel next to Show rows.
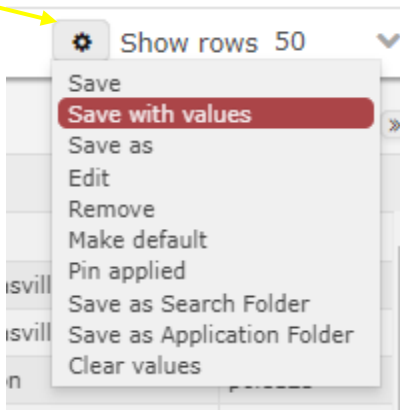
- If Save with values is selected, the filter will always show Status of open, owners of UPC and UPC2, and a created on date of 01-01-2018 or greater when selected.
- If Save is selected, the filter will show the parameters of Status, Owner, and Create on but with no values so they can be selected as needed.
- Once saved, this filter will show in the Ticket list each time the Search box is clicked from Tickets.
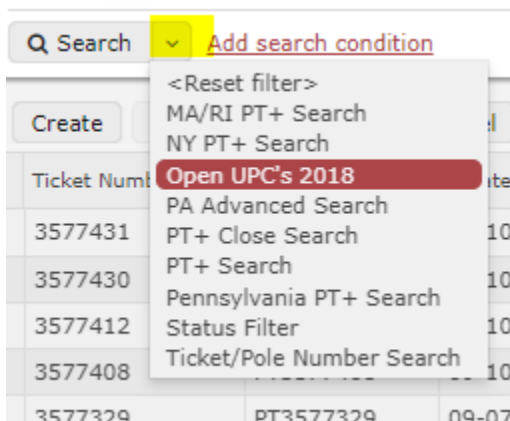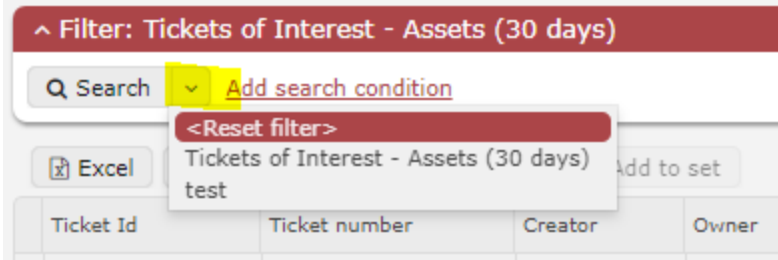

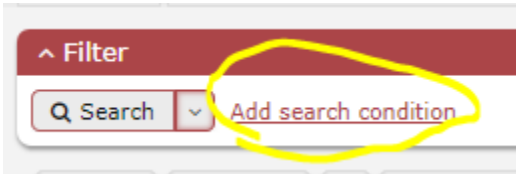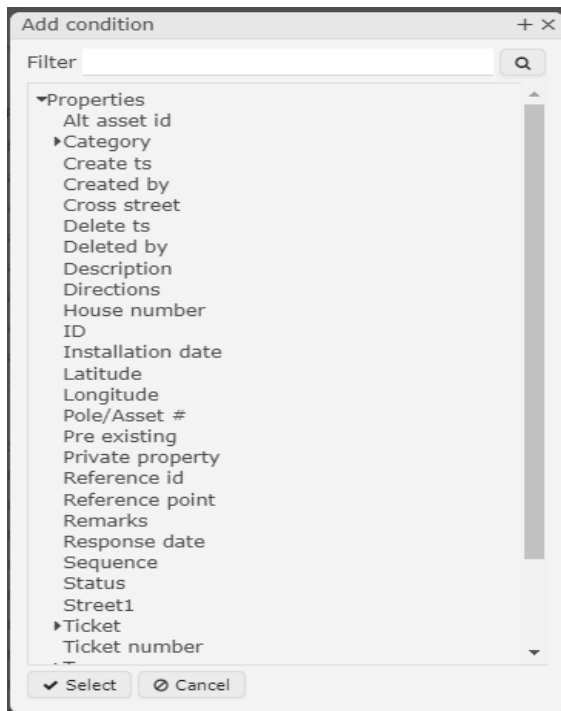## Creating Custom Search Filters from Poles/Assets

- Click on Poles/Assets
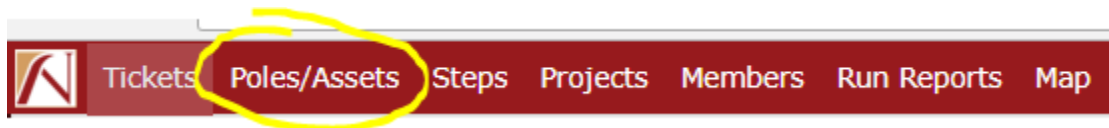
- Clear the current filter by clicking the down arrow next to search and click Reset Filter.

- Click Add Search Condition to begin building a filter.
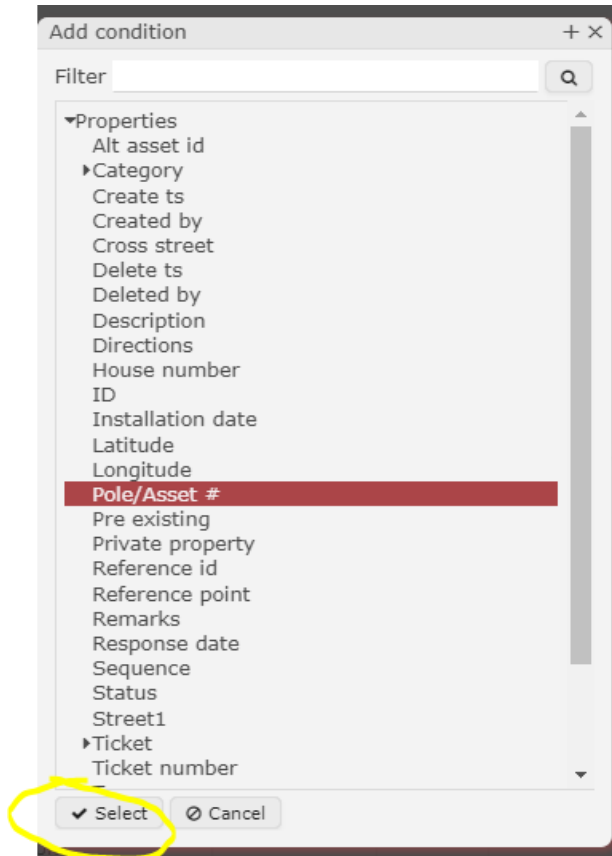

The list displays all available fields that can be added to the search.

In this example, the filter is being created to show tickets that have a pole number of pole123, created by member code UPC2. Substitute other fields as needed.
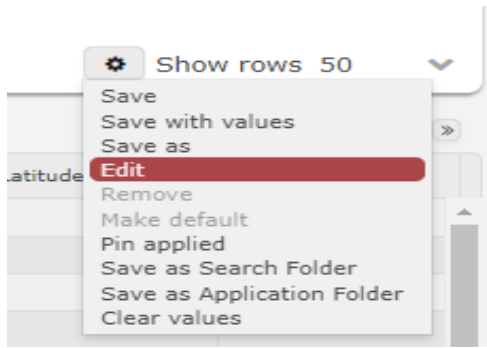
- Highlight Pole/Asset# and click Select

This field will be added above the Search box. Click the gear icon located to the right next to Show rows. (You can also start building from this point)
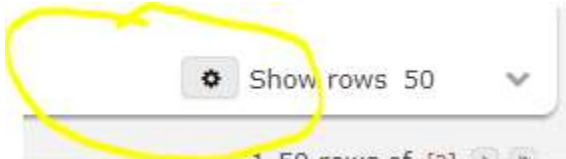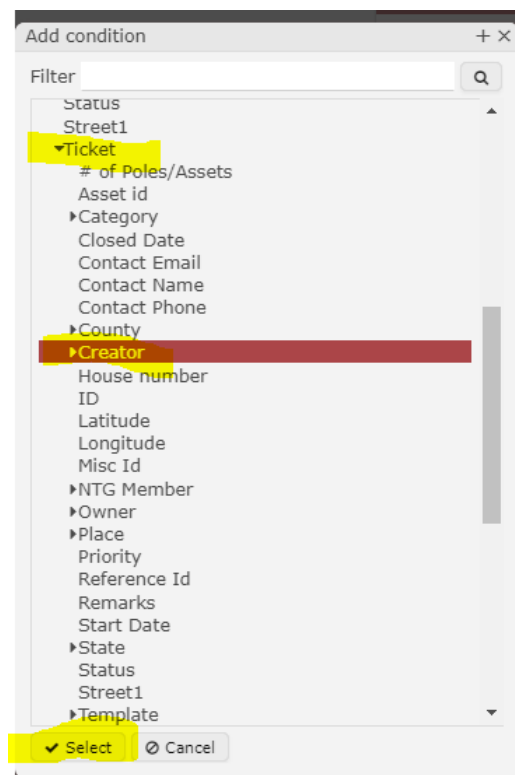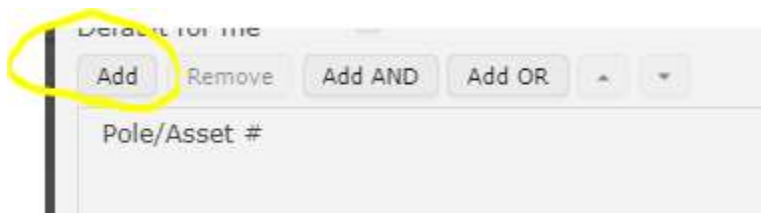

- Click Edit

This will open the Edit Filter Box. The Filter can be given a name and more fields added to the search.

Click Add to add the Creator member code.

- Higlight Creator and click Select.

- Click OK if finished building the search or continue adding additional fields.

The Filters will be displayed above the Search.

Filters can be saved with or without values.
- To save without values, click the gear icon and select Save As.
- To save with values, enter the values and click the gear icon, but choose Save with values.

Creating Search Filters from Steps

- Click on Steps.
- Clear the current filter by clicking the down arrow next to Search and select Reset Filter.
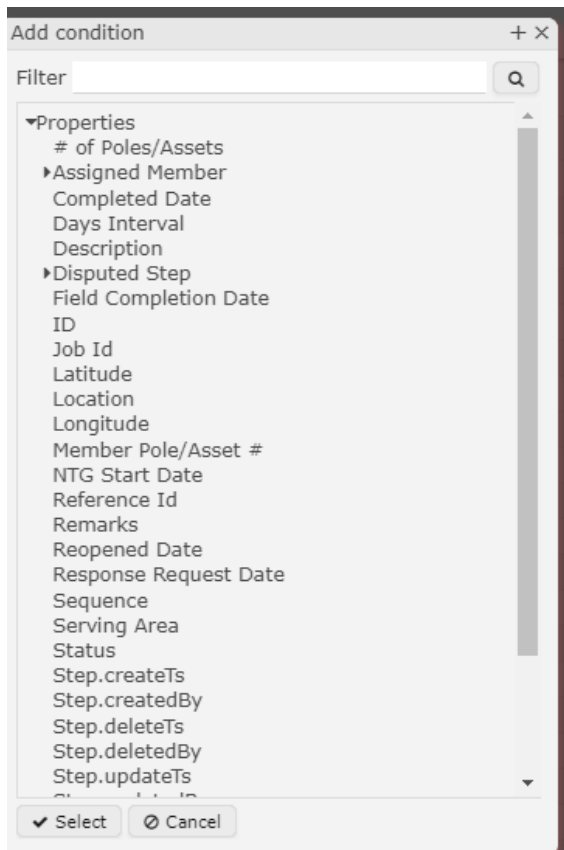
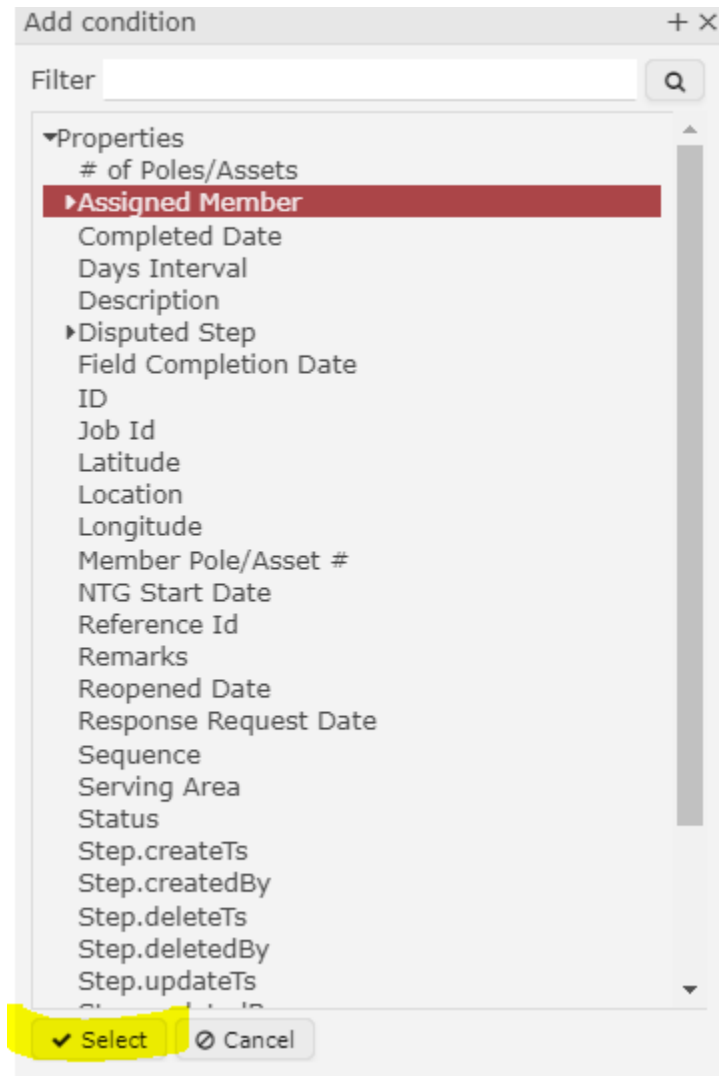- Click Add Search Condition to begin creating the filter.
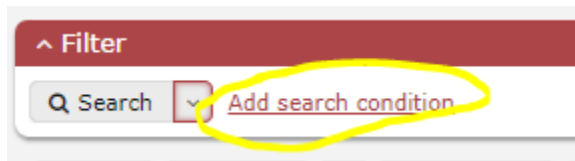
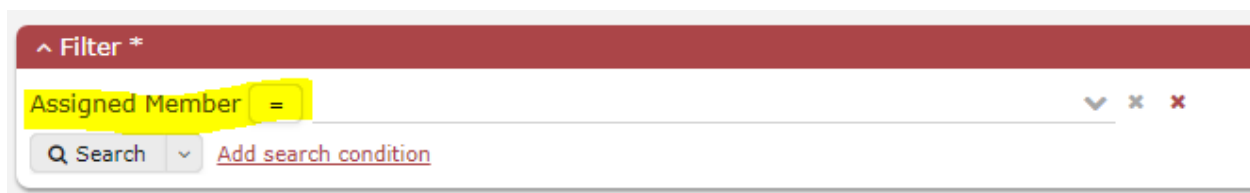Fields available for step are shown in the box:

In this example, the filter will be built to show all steps completed by member code UPC and UPC2. The completed date range will be for the month of August 2018.
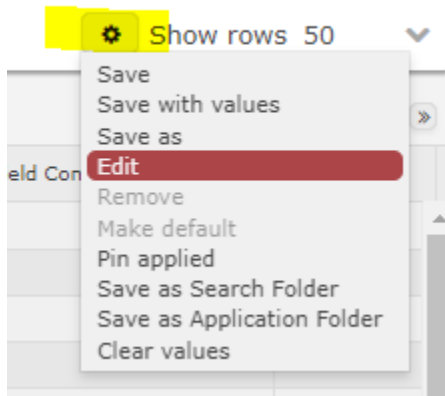
- First, select Assigned Member and click Select.

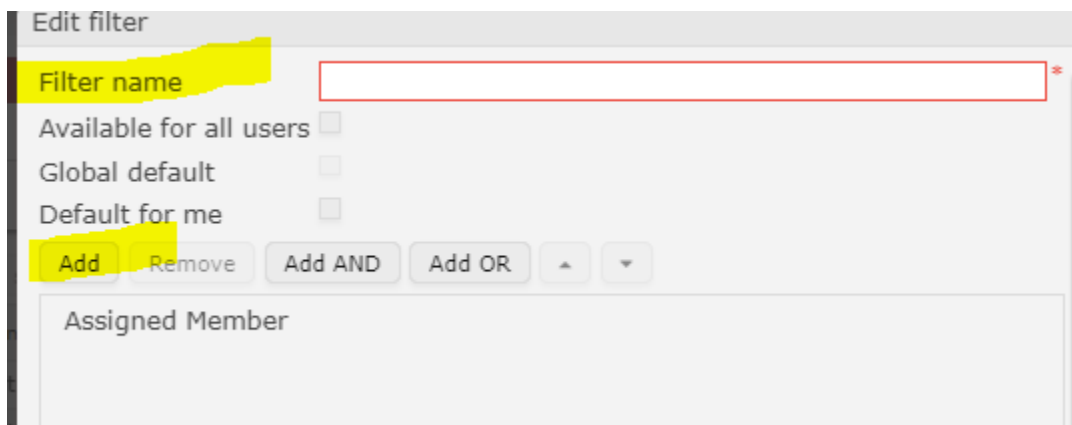Assigned Member field will appear above the Search icon.

- Click the gear icon to the right located next to Show rows and select Edit.
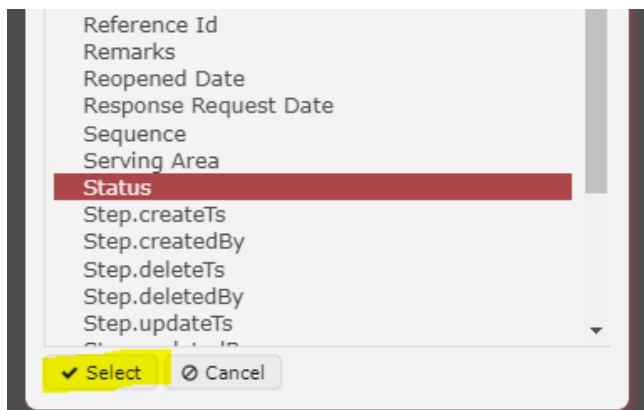

This will pull up the Edit Filter box. A name can be given to the filter and additional fields added.

- To continue building the filter, click the Add icon.

- For this example status is need so select the status field and click Select
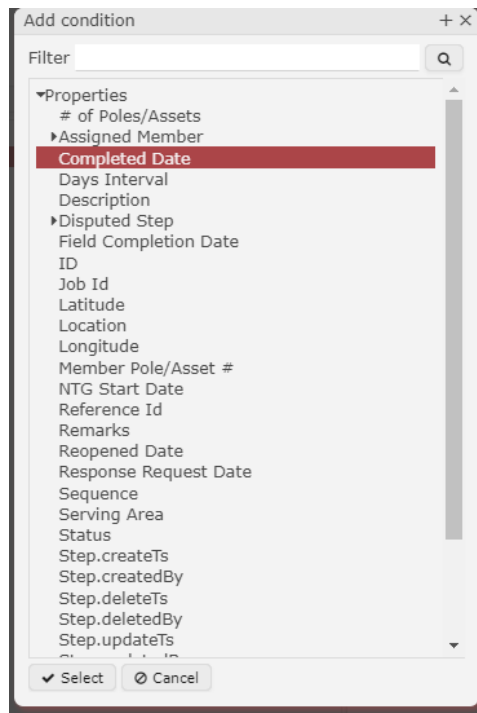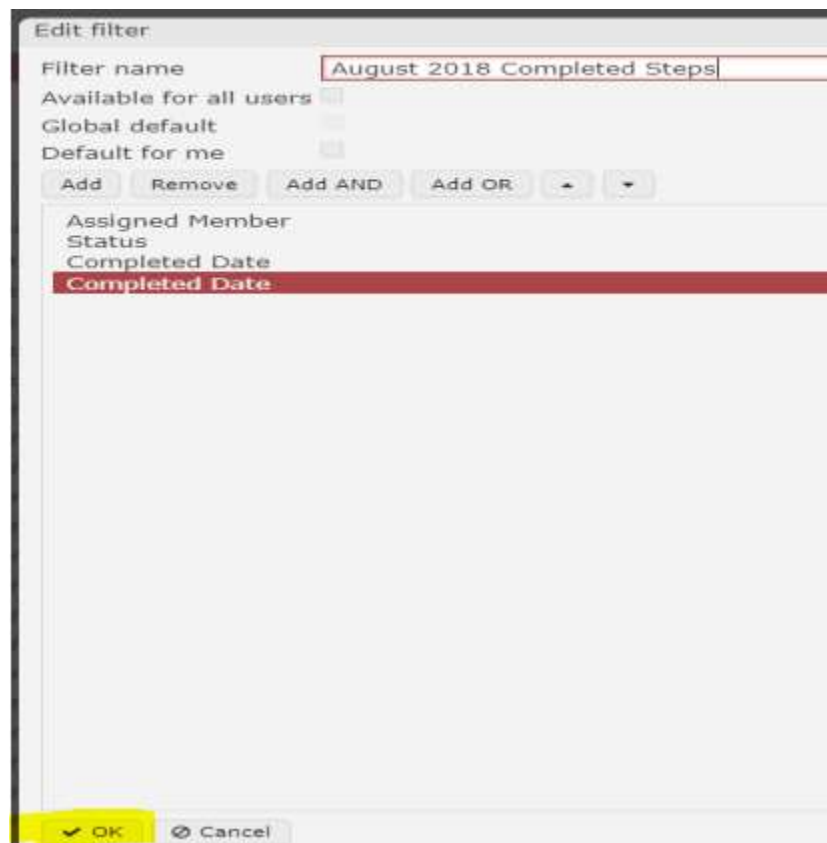
- Click the Add icon again.

In this example, the completed date is needed so click Completed date and then Select.

In this example, the completed date needed is a date range for all of August, so another Completed Date field is needed.

- Click the Add icon again.
- Select Completed Date again and click Select.

- Once the filter is completed, click OK

The fields are displayed above the Search:

- If only one member code is needed for Assigned member, enter it here:

If more than one member code is needed, click the equal sign and change to 'in'

- Click the three dots to bring up the Member selector

- Select the codes and click OK

listEditorPopup.caption   + ×

UPC2 ✖
UPC ✖

✔ OK   ⊘ Cancel
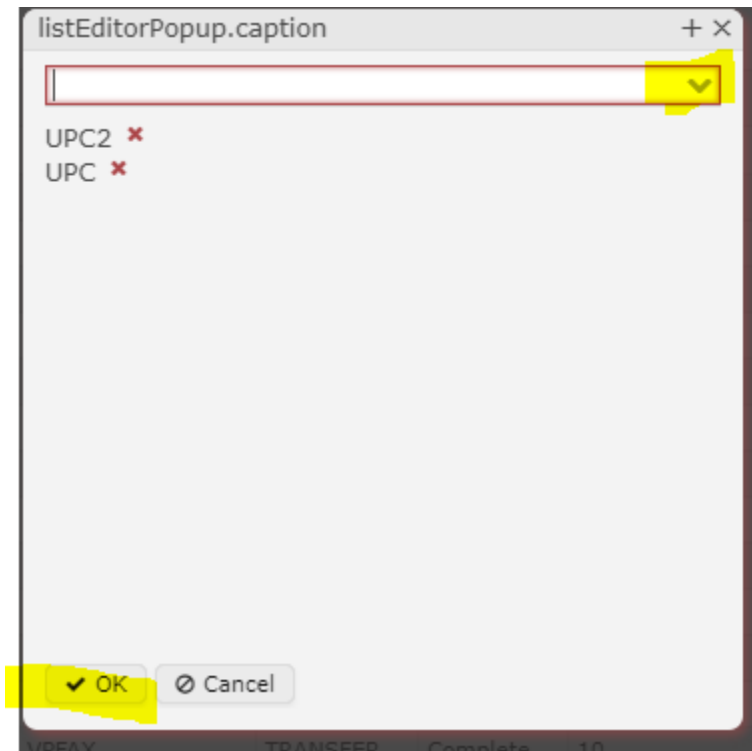
- Click the down arrow next to Status and select Complete

⋯ ✖   ✖ Status [=] [

Pending
NTG
Complete
Canceled
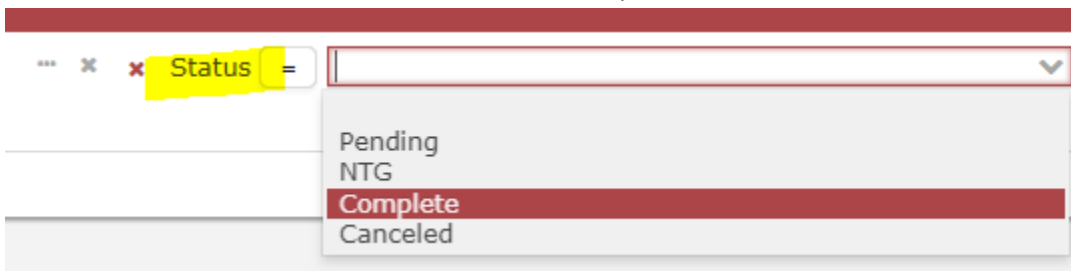
Since the date range for this example is from 8/1/2018 to 8/31/2018, the First date should be changed to >= (greater than or equal to) and the second date should be changed to <= (less than or equal to). Click the equal (=) sign to change it.

⋮ Completed Date [>=] 08-01-2018 📅 ✖

First completed date:

Completed Date [<=] 08-31-2018 📅 ✖

Second completed date:

The Filter is now completed.

- Click Search to see the results.

The option to save with or without values is available.
- To save without values, click the gear icon and select Save As.
- To save with values, enter the values and click the gear icon, but choose Save with values.

When clicking on Steps, the filer will be available in the Search drop down.