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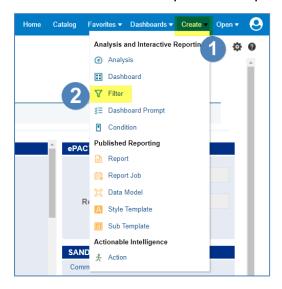
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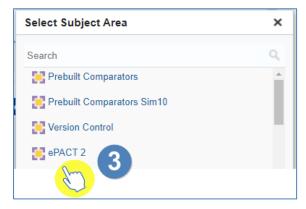
# **Creating a Saved Filter using an external list**

### **Creating a Saved Filter**

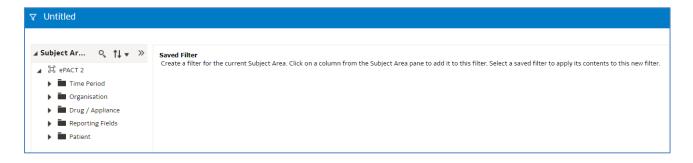
- 1. From the 'Landing Page' select 'Create'.
- 2. Select 'Filter' from the drop-down list presented.



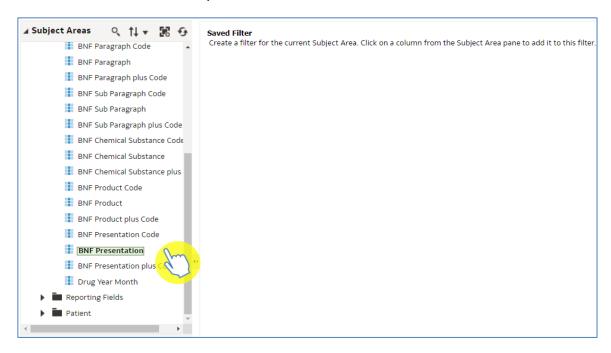
3. Select the 'ePACT2' subject area.



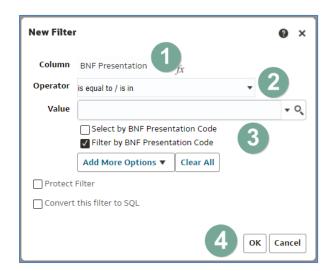
4. The 'Saved Filter' pane will open.



5. Expand the subject area to locate the column you wish to create the filter on and double click the column required.



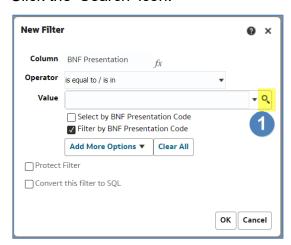
6. The 'New Filter' pane will be displayed.



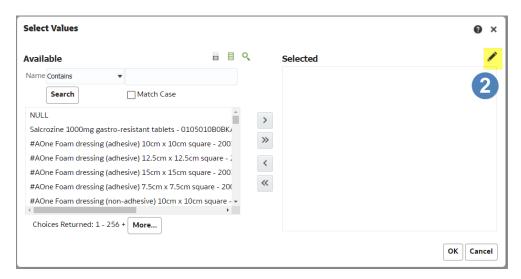
1) Column	Indicates the column you are applying a filter to
2) Operator	This is the condition applied to the filter
3) Value	This is where you select the value you want to filter the column on
4) OK	Select OK to apply the filter to your analysis

### Including values from the external list

1. Click the 'Search' icon.



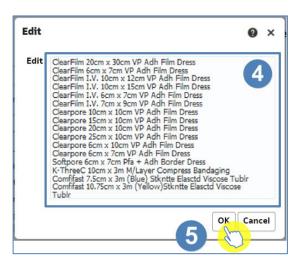
2. Within the 'Select Values' pane select the pencil icon in the upper right-hand corner.



3. The 'Edit' pane will be displayed.



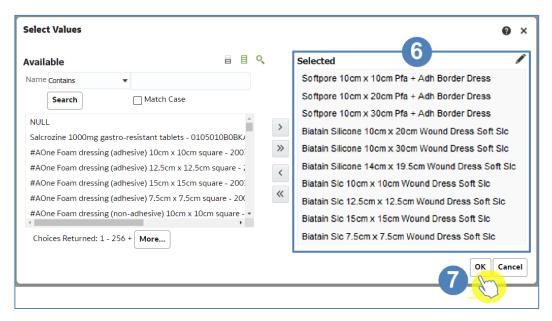
- 4. Paste the list of values from the external list into the 'Edit' pane.
- 5. Select 'OK' to confirm.



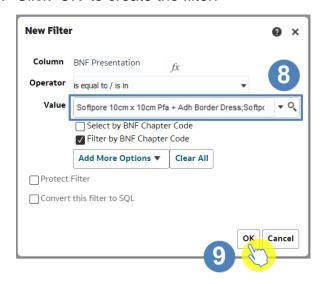


The number of entries which can be included in a 'values' section is limited to 9,999.

- 6. The values selected will be displayed within the 'Selected' area of the 'Select Values' pane.
- 7. Select 'OK'.



- 8. The selected values will now appear within the 'Value' section.
- 9. Click 'OK' to create the filter.



10. The filter will be created including the values selected.



### Saving a Filter

1. To save your filter you can select the 'Save or 'Save As' icon available in the top right-hand corner of your saved filter pane.



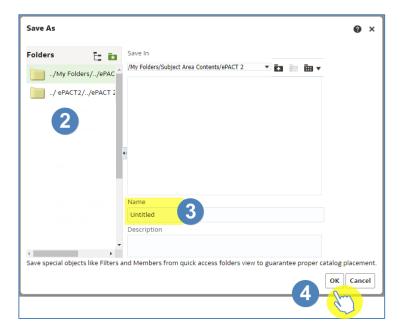


Save – Saves the filter, overwriting any current version.



Save As – Will save the filter as a separate new filter.

- 2. When you select save, the system will then give you the option to choose the folder you want your filter saved in.
- 3. Name the filter, the default name will show as 'Untitled'.
- 4. Click 'OK' to save the filter.



5. A 'Saved' icon will momentarily appear next to the 'Save' and 'Save As' icons



## **Getting more help**



#### Additional training material and user guides

The ePACT2 training team has developed several how to guides to help you get the best out of ePACT2. These can be found on our <u>ePACT2 user guides page</u>

#### Webinar sessions

We offer a free webinar training service to all our users and you can book as many sessions as you need.

Our webinar sessions are booked as 1hour slots and we offer a number of different sessions covering a range of topics.

We also offer bespoke sessions which are delivered just to you or your invited colleagues. You can let us know if you have any specific topics or reports you'd like to cover or if you would prefer an introductory tour of the system.

Our experienced trainers deliver these sessions using MS Teams and you can take part wherever you are as long as you can get online.

You can find our more and book your webinar by going to our <a href="mailto:ePACT2 training page">ePACT2 training page</a>