Create basic filter activities

Activity 1 - All projects in the Marketing portfolio

In this activity you will create a project filter named "All projects in the Marketing portfolio" in the Legacy filter experience. This will show you all the projects in the portfolio named "Marketing Portfolio" regardless of their status.

Step-by-step instructions are included below.

Answer to Activity 1

1. Navigate to the Projects area from the Main Menu. This shows you a list of projects.

2. Click the **Filter** menu and select Legacy Filters.

3. Select **New Filter**.

4. Name your filter "All projects in the Marketing portfolio."

5. Click **Add Filter Rule**.

6. In the Start typing field name field, type "portfolio name". Then select Name under the Portfolio field source.

7. Leave the Equal operator as it is.

8. Type "marketing" in the Start typing name field.

9. Select Marketing Portfolio assuming you have a portfolio of that name you want to filter on. If not simply use the type ahead feature to find the portfolio you want.

10. Click **Save Filter**.

Activity 2 - Projects I own closing this month

In this activity, you will create a project filter named "Projects I own closing this month" in the Legacy filter experience. If you're keeping an eye on a lot of projects, this filter can help you zoom in on the ones that are planned to close soon.

Step-by-step instructions are included below.

Answer to Activity 2

1. Navigate to the Projects area from the Main Menu. This shows you a list of projects.

2. Click the **Filter** menu and select Legacy Filters.

3. Select **New Filter**.

4. Name your filter "Projects I own closing this month."

5. Click **Add Filter Rule**.

6. In the Start typing field name field, type "owner". Then select Owner ID under the Project field source.

7. Leave the Equal operator as it is.

8. Type "$$" in the Start typing name field.

9. Select $$USER.ID. This is the wildcard for the logged-in user.

10. Click Add Filter Rule again.

11. In the Start typing field name field, start typing "Is Complete". Then select Is Complete under the Project field source.

12. Leave the Equal operator as it is.

13. Select "False."

14. Click Add Filter Rule again.

15. In the Start typing field name field type "planned", then select Planned Completion Date under the Project field source.

16. Change the Equal operator to This Month.

17. Click **Save Filter**.