**TA/RA Application Tracker - Filter System Tutorial**

This document summarizes the tutorial explaining how the filter system works in the TA/RA Application Tracker. Below is a detailed step-by-step guide on how to access, use, and manage filters within the application list interface.

**Accessing the Application List and Filters**

To access the TA/RA Application List:

* Navigate to the left-hand panel.
* Click on **‘TA Ora Application Track’**.

At the top of the list, right across from the title **‘TA Ora Application Tracker’**, you'll see a row of icons. Look for the one that looks like a **funnel,** this is the filter tool. Click on this icon to open the filters panel.

**Using the Filters Panel**

Inside the filter panel, you can refine your search using several filter criteria. For example:

* Want a TA with **4+ years** of experience? Select that.
* Looking for someone who can work **20 hours full-time**? Check that too.
* Need prior experience at **GMU**? Set that filter as well.

You can combine multiple filters to narrow down your candidate list. Once you have your filtered list, you can click on a candidate’s name to view their application documents and decide whether to proceed with an interview.

**Clearing Filters**

All active filters will appear in a bar. To **remove a filter**, simply click the **‘X’** icon next to it in the filter bar.

**Filtering Specific Columns**

In addition to the main filters panel, you can filter individual columns directly:

* For example, to find someone named **Michael**:
  + Click the column header (e.g., “First Name”).
  + Select **‘Filter By’**.
  + A panel will appear with all available values in that column.
  + Type or select “Michael”, and click **Apply**.

This lets you do more targeted filtering beyond what’s available in the main panel.

**Pinning Columns to the Filters Panel**

We’ve pre-added common filter options professors usually need. But you can also **customize the panel** by adding more:

* Click the column you want to pin.
* Go to **Column Settings**.
* Click **‘Pin to filters panel’**.

Now that column becomes available in the filter sidebar.  
To **remove** it:

* Click the three dots next to the filter name in the panel.
* Select **‘Remove’**.

**How Filter Options are Generated**

Filters reflect what users input in the form. Here’s how it works:

* If a user types something **unique**, that becomes a new filter value.
* If a field uses **choice options** (e.g., Yes/No), only those defined values show up in the filters.

To keep the filters clean and consistent, we limit free-text entry in forms and use dropdowns or selection controls wherever possible.

**Example: TA Experience Filter**

The TA Experience field, for example, had set options like:

* None
* 1
* 2
* 3
* 4+

Only those values will appear in the filters. If no user selects “4+”, it won’t show up as a filter option at all.

**Summary**

To recap:

* Use the **funnel icon** to access main filters.
* Filter individual columns for specific values.
* Add or remove filters in the panel using **Column Settings**.
* Limit user inputs in forms to maintain a clean and usable filtering system.

This setup ensures the SharePoint-based application tracker remains user-friendly, organized, and efficient for reviewing TA/RA applications.