

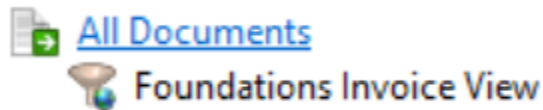
## Creating Private Filter

To create a private filter, enter the Preceptive Content Explorer by selecting the documents button from the client.

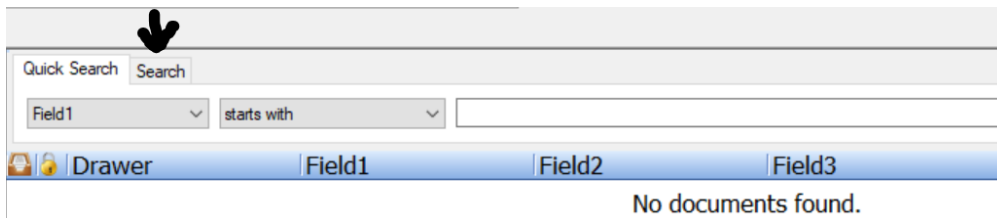


Within the Preceptive Content Explorer, select the view we want to add a filter in.

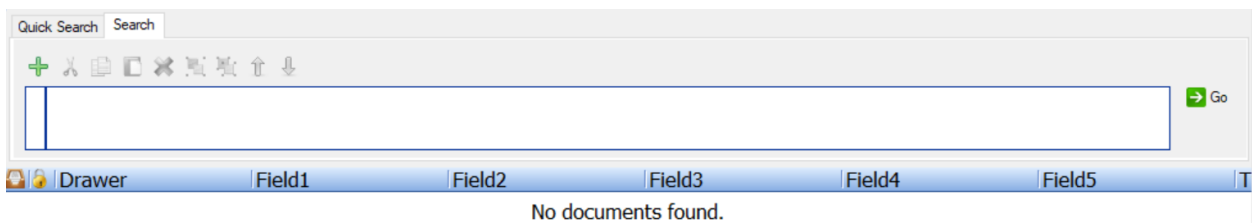
- In your case, select the view “All Documents”.



After selecting the view, go the search bar shown below and select the “Search” button.



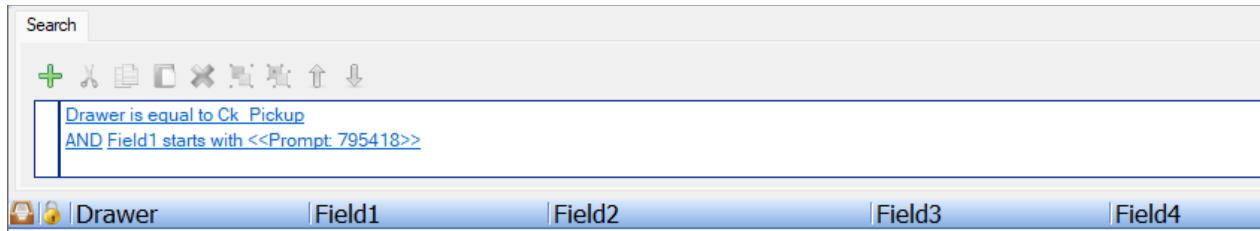
The search bar should now look like the following image:



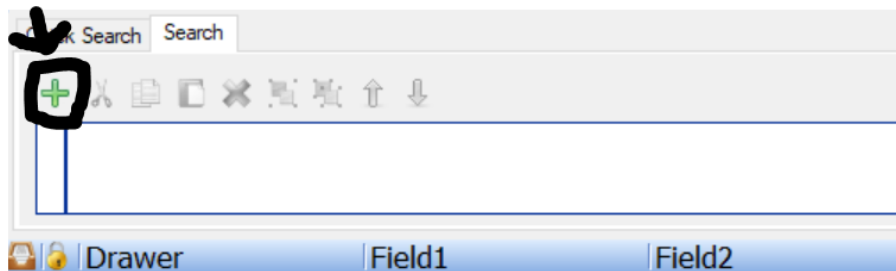
The filter you want to make should have certain search conditions, we'll want to select those conditions.

As an example, the filter we'll create will have the following search conditions:

1. Drawer is equal to "Ck\_Pickup"
2. Field1 starts with a given number



To add the first conditional, select the green plus sign button:



No docum

The following window should appear:

Add Condition

×

Constrain by: Document key

Type: Normal

Field: Drawer

Operator: is equal to

Value: AA Grievances

OK

Cancel

Since we want to only find documents within the “Ck\_Pickup” drawer, just select the value drop-down and pick the “Ck\_Pickup” from the list.

Add Condition

Constrain by: Document key

Type: Normal

Field: Drawer

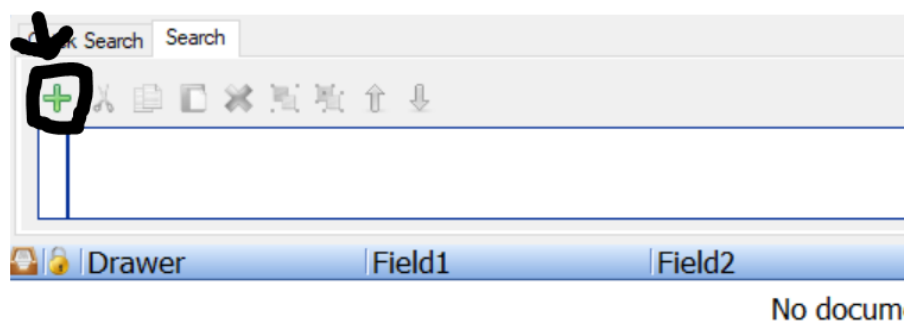
Operator: is equal to

Value: Ck\_Pickup

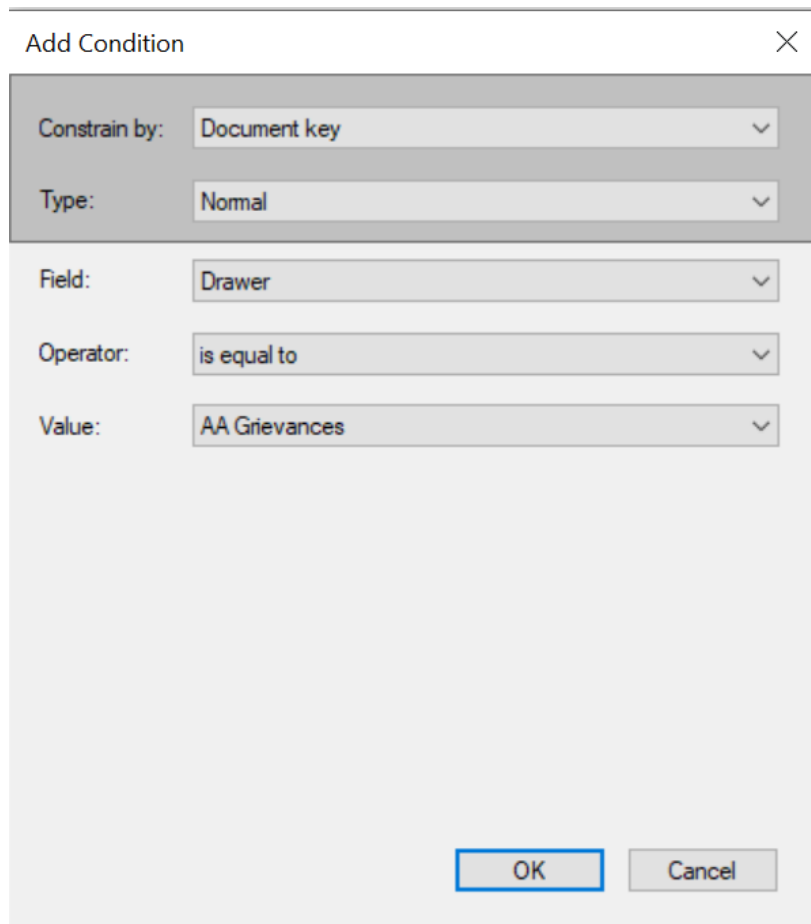
OK Cancel

Click “OK” to save our conditional.

To add the second conditional, select the green plus sign button again:



The same window we had before should open again:

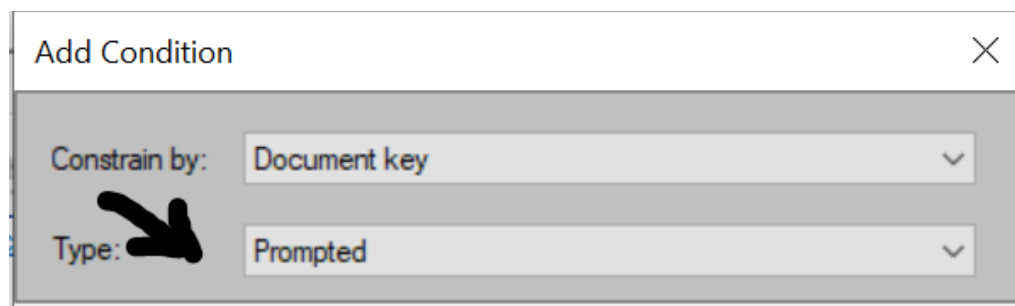


The 'Add Condition' dialog box is shown with the following settings:

- Constrain by: Document key
- Type: Normal
- Field: Drawer
- Operator: is equal to
- Value: AA Grievances

Buttons: OK, Cancel

Since we want a pop-up to give the value that we are searching for, change the type to “Prompted”:



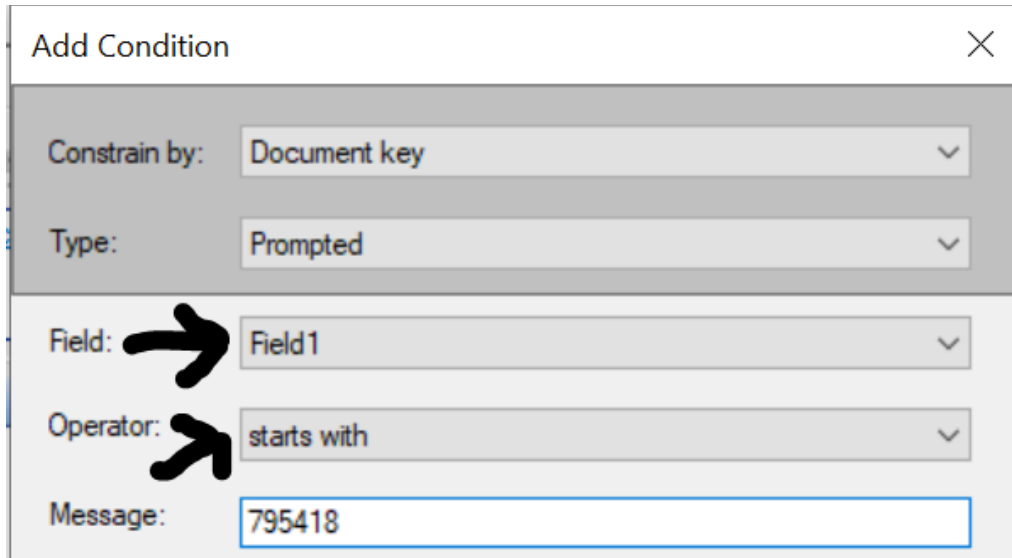
The 'Add Condition' dialog box is shown with the following settings:

- Constrain by: Document key
- Type: Prompted

A hand icon is pointing to the 'Type' dropdown menu.

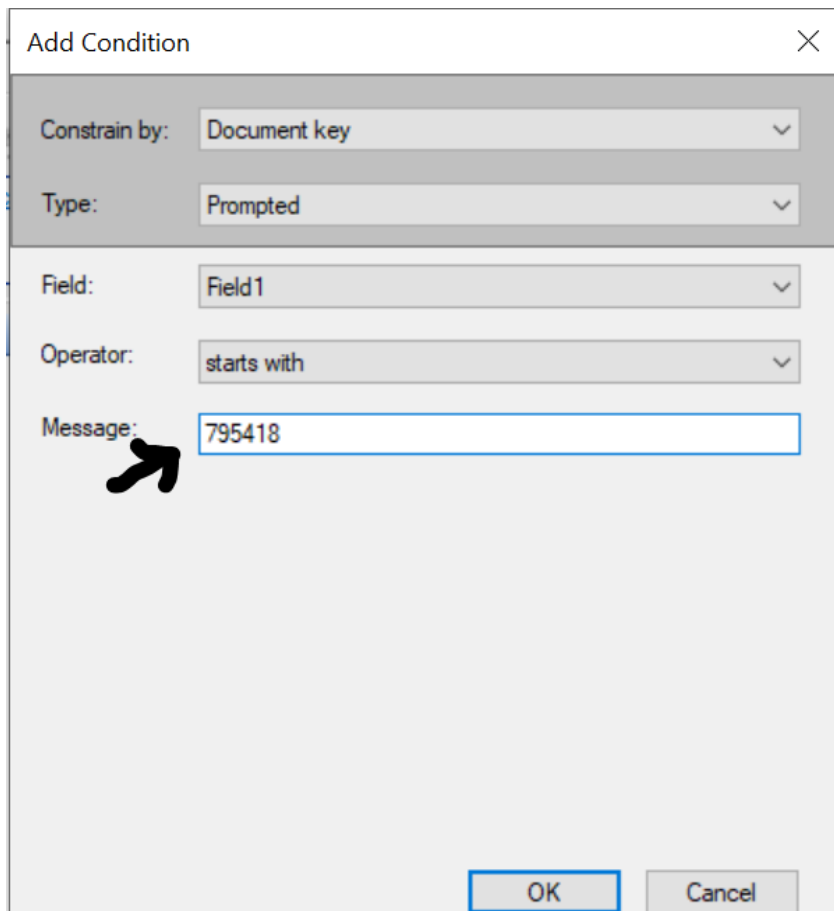
- Setting the type to prompted means we’ll be prompted to give a value to search by

To search based on the start of Field 1, change Field to “Field 1” and Operator to “starts with”:



The screenshot shows the 'Add Condition' dialog box. It has a title bar with a close button (X). The dialog contains several fields: 'Constrain by:' with a dropdown menu showing 'Document key'; 'Type:' with a dropdown menu showing 'Prompted'; 'Field:' with a dropdown menu showing 'Field1', which is pointed to by a large black arrow; 'Operator:' with a dropdown menu showing 'starts with', also pointed to by a large black arrow; and 'Message:' with a text input field containing '795418'.

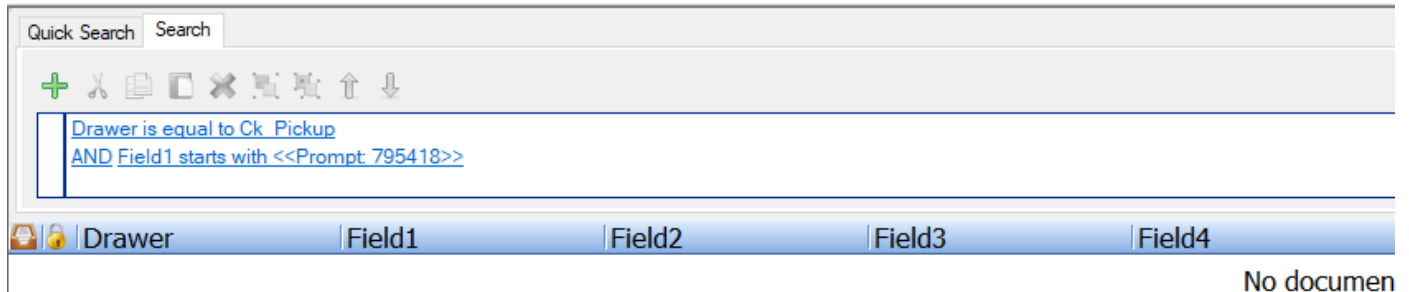
Finally, to match the message of the prompt, type “795418”. The popup will show that message.



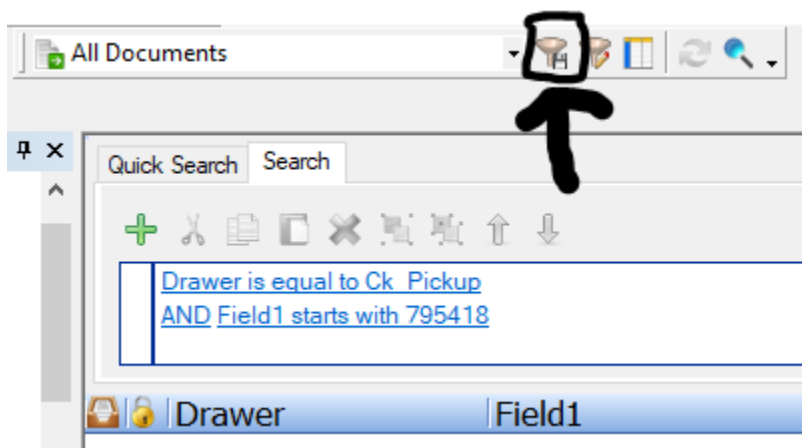
This screenshot shows the same 'Add Condition' dialog box. In this view, a large black arrow points to the 'Message:' text input field, which contains the value '795418'. The 'Field:' dropdown is set to 'Field1' and the 'Operator:' dropdown is set to 'starts with'. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

Click “OK” on the window, and the second condition will be saved.

Now our search bar should look like the following:



Finally, since we want to save these conditions as a new filter, click on the “Save Private Filter” button



This button will open a window asking for the name and description of the filter. Just change the name to “Ck\_Lookup”.

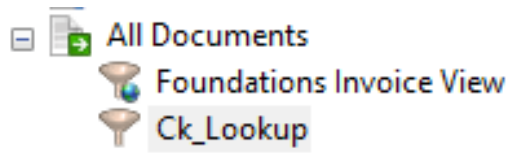
Save Filter

Name: Ck\_Lookup

Description:

OK Cancel

Click “OK” on the window and the filter has been created.



Click on the filter, and the search conditions will apply.

If you selected a prompt value, a popup should appear for you to perform your search.

