

How to Create and Apply Filters

Users have the ability to filter information on many of the grids in Topaz Elements. These grids are in the My Dashboard area and in certain questions on the Animal Protocol and Animal Order forms that utilize grids.

1. Navigate to an appropriate Grid screen which allows filters and Click  in the upper right to open the Filter Panel.

2. Click  icon to Create a New Filter.

3. If you wish to save the filter for future use, type a name for it in the Name: text box.

4. Select the field you wish to filter on from the drop-down list and then Click the green plus sign  to add these conditions to the filter. Check NOT and type in a value in the text box or click on the green circle plus icon , if you want to include a condition which does not meet the selected criteria.

5. Select from the following filter options by choosing the icon:

-  Apply Filter to Grid to obtain results
-  Add Additional Conditions to the Filter
-  Delete Filter
-  Remove Filter Conditions
-  Save Filter

6. Select the item(s) you wish to view, print a report for, or export by clicking on the check box to the left of the items in the grid.

7. Select from the following:

-  Print Report from drop-down list
-  Print results to a PDF file
-  Export results to an Excel file

8. To apply an existing saved filter, select its name in the Filter: dropdown and then repeats steps 6 and 7 above.

