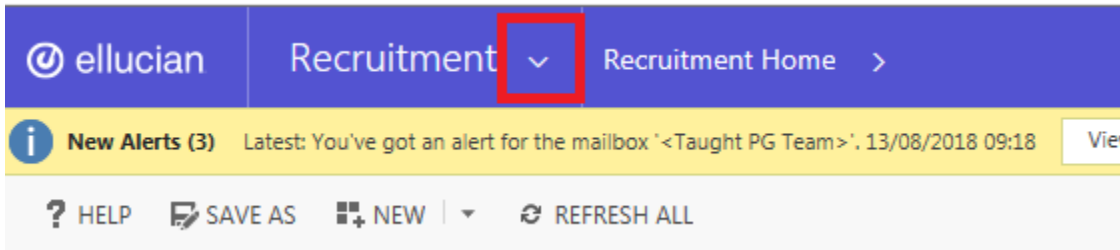


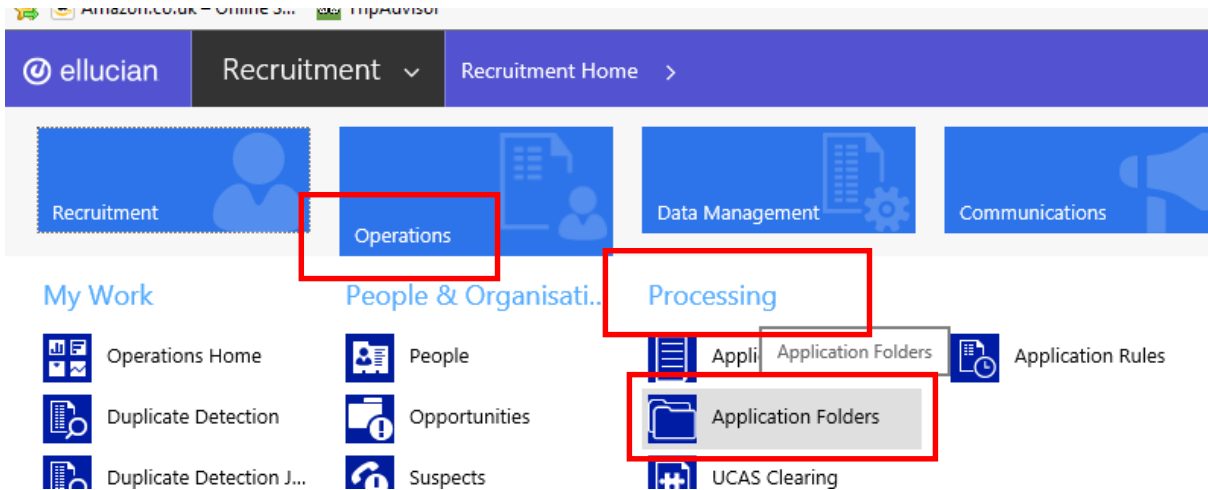
# How to View (and save) filters on CRM Recruit

can be customized as you wish

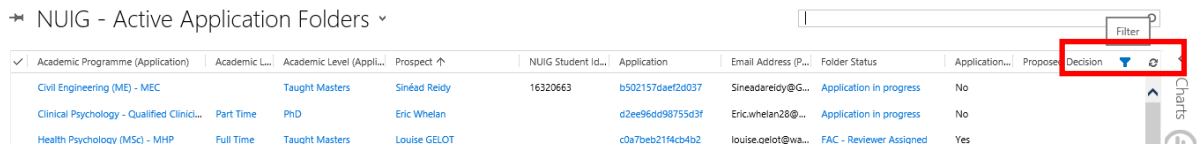
1. Select the arrow next to Recruitment



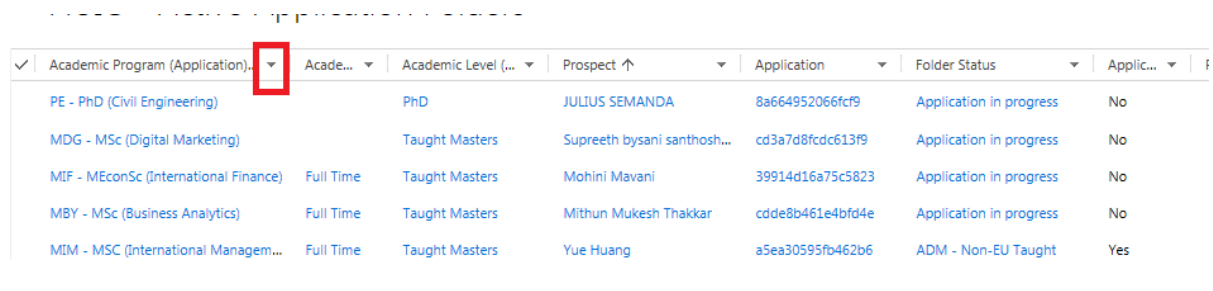
2. Select Operations, Processing and Application Folders



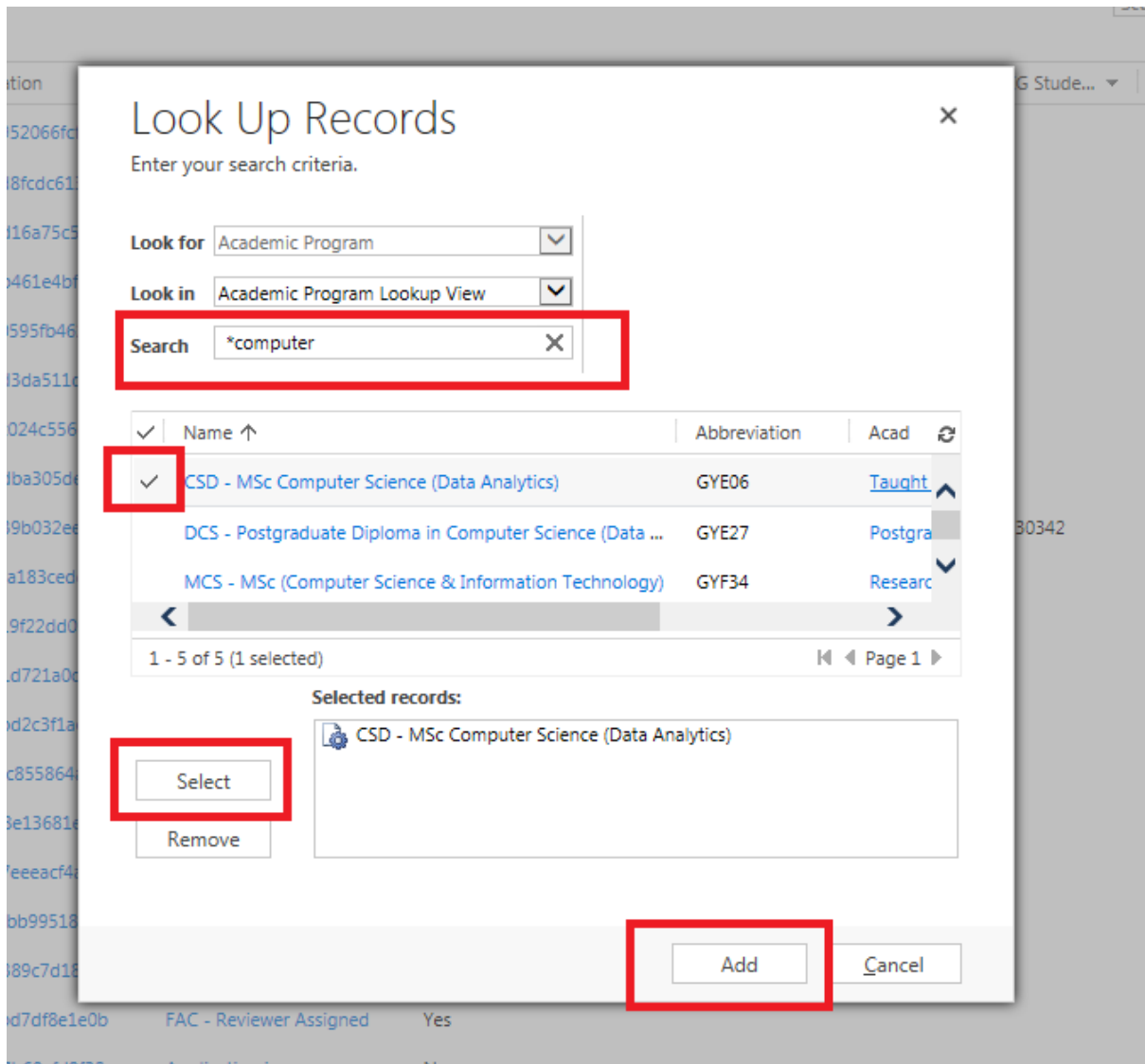
3. At the far right of the screen there is a triangle shape, this is the filter, click on the filter



4. Filter by course/completed etc
5. Example: Select the arrow next to Application Programme. A drop down will appear
6. Select 'filter by specific academic programme'



7. In the search put in \* and type the course. Try only using one word. Hit enter. Scroll and select your course. **DO NOT** click the blue as this will bring up another screen.
8. Place a check mark.
9. Select (important step)
10. Add
  - \*\*\*\* note you are now viewing **all status** applications\*\*\*\*



11. Proceed to then filter by Application **Completed**. Select Yes as these would be of more interest

Application	Folder Status	Application	Proposed Decision	De
8505011bbd267b9e	Application in progress	No		
4174325c001d5675	ADM - Other Choice	Yes		
21f1d3974a78b37b	FAC - Reviewer Assigned	Yes		
ce424c138bbc96d0	Decision Released	Yes	Declined by Program...	
33ee3ab0161737c7	Application in progress	No		
f1c3389b4dc8929	Application in progress	No		

12. Go on to filter by Proposed Decision and Select the ones of interest. Examples below of ones you might want to add. You can view the accepted offers / and offers you have issued that haven't been accepted.

**Look Up Records**

Enter your search criteria.

**Look for** Application Status Type

**Look in** Application Status Type Lookup View

**Search** Search for records

Name	Abbreviation
Firm Offer	FO
Pay Deposit - Post Conditional	
Waitlisted	W

1 - 11 of 11 (7 selected) Page 1

**Selected records:**

- Accepted Offer
- Accepted Offer - Conditional
- Accepted Offer - Firm
- Accepted Offer (Conditions Met)
- Conditional Offer
- Firm Offer
- Pay Deposit - Post Conditional

Select Remove Add Cancel

13. You can save this as a personal view, so you will be able to go directly to this filtered list easily. Go back to the tab (pictured below) and find the Save Filters as New View, this may be at the top or bottom.

✦ NUIG - Active Application Folders

Academic Program (Application)...	Acade...	Academic Level (...)	Prospect	Application	Folder Status	Applic...	Proposed Decisi...	Decision Status	NUIG Stud...	Cre
CSD - MSc Computer Science (Data...	Full Time	Taught Masters	Tanvi Ravindra Shirke	4174325C001d5675	ADM - Other Choice	Yes			19230930	19/
CSD - MSc Computer Science (Data...	Full Time	Taught Masters	Reenu Muthu	21f1d3974e78b37b	FAC - Reviewer Assigned	Yes			19230931	18/

Waitlisted Application Folders

**My Views**

- Computer Science - Need Decisions
- International Accounting
- International Apps Not Owned
- Owned by Me

Create Personal View

Save Filters as New View

Save Filters to Current View

14. This will then allow you to save this as a personal view. Name it as you wish. Ex. Accepted Offers, etc.

## Save as new View

The view is stored in the list of saved views.

Name \*

NUIG - Active Application Folders

Description

Save Cancel

This view will now always be available to you. It will continually update on its own.

To view this when you login follow steps 1, 2, 3, and 10. The view you have just created will be available in the drop down.

This view can also be opened in Excel available in Excel Template on the top of the screen