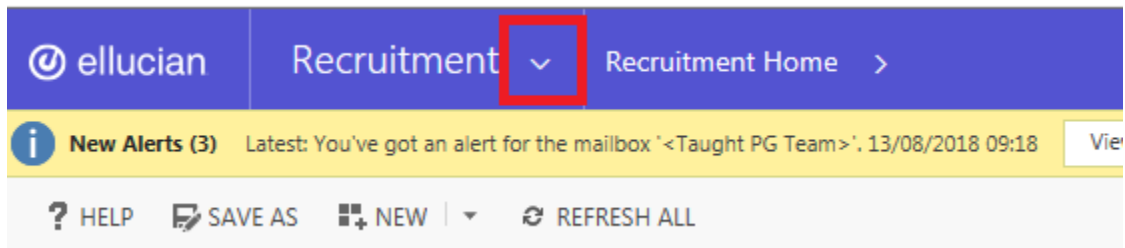
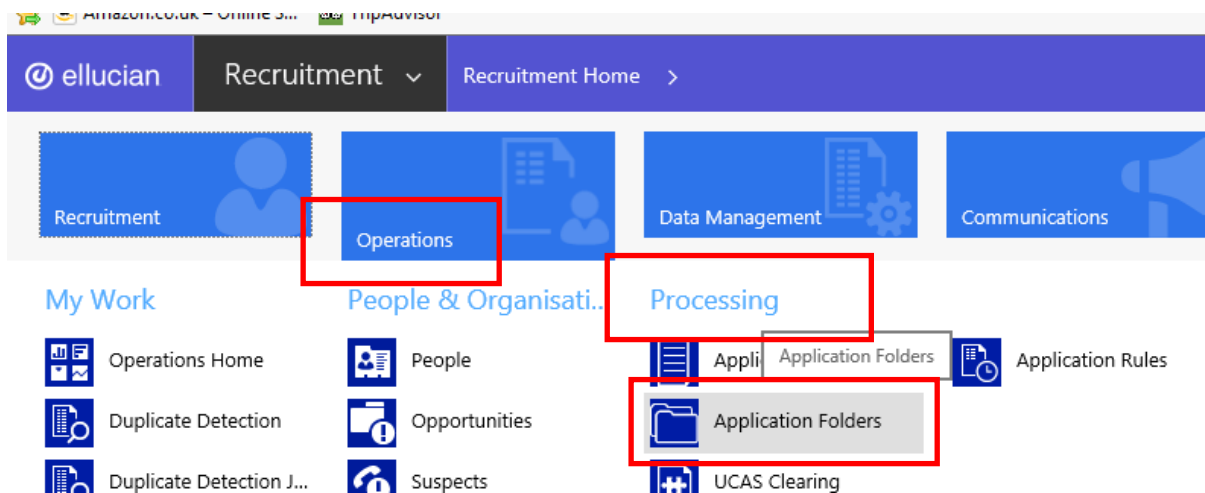


How to View (and save) filters on CRM Recruit can be customized as you wish

1. Select the arrow next to Recruitment



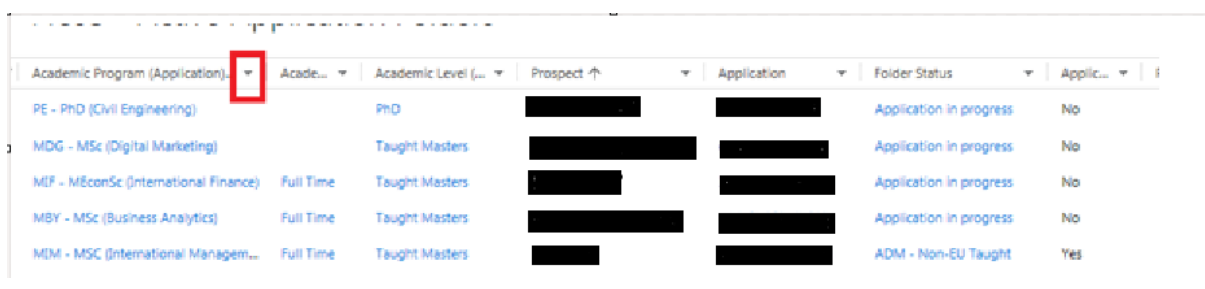
2. Select Operations, Processing and Application Folders



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****

The screenshot shows a 'Look Up Records' dialog box. At the top, it says 'Enter your search criteria.' Below this are three fields: 'Look for' (set to 'Academic Program'), 'Look in' (set to 'Academic Program Lookup View'), and 'Search' (containing '*computer'). The search results are displayed in a table with columns: Name, Abbreviation, and Acad. The first result, 'CSD - MSc Computer Science (Data Analytics)', is selected with a checkmark in the first column. Below the table, there is a 'Selected records:' section with a 'Select' button and a 'Remove' button. At the bottom right, there is an 'Add' button and a 'Cancel' button. Red boxes highlight the 'Search' field, the selected record, the 'Select' button, and the 'Add' button.

✓	Name ↑	Abbreviation	Acad
✓	CSD - MSc Computer Science (Data Analytics)	GYE06	Taught
	DCS - Postgraduate Diploma in Computer Science (Data ...)	GYE27	Postgra
	MCS - MSc (Computer Science & Information Technology)	GYF34	Research

1 - 5 of 5 (1 selected) Page 1

Selected records:

CSD - MSc Computer Science (Data Analytics)

Select Remove Add Cancel

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

interest

Application	Folder Status	Applic...	Proposed Decisi...	De
██████████	Application in progress	No		
██████████	ADM - Other Choice	Yes		
██████████	FAC - Reviewer Assigned	Yes		
██████████	Decision Released	Yes	Declined by Program...	
██████████	Application in progress	No		
██████████	Application in progress	No		

- 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

Look in

Search

✓	Name ↑	Abbreviation	
✓	Firm Offer	FO	▲
✓	Pay Deposit - Post Conditional		
	Waitlisted	W	▼

1 - 11 of 11 (7 selected) Page 1

Selected records:

Select

Remove

Accepted Offer

Accepted Offer - Conditional

Accepted Offer - Firm

Accepted Offer (Conditions Met)

Conditional Offer

Firm Offer

Pay Deposit - Post Conditional

AddCancel

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.

The screenshot shows a web application interface. At the top, there is a tab labeled "★ NUIG - Active Application Folders" with a dropdown arrow. Below the tab is a table with columns: Academic Program (Application)..., Acade..., Academic Level (...), Prospect ↑, Application, Folder Status, Applic..., Proposed Decisi..., Decision Status, NUIG Stude..., and Crei. The table contains two rows of data. Below the table, a dropdown menu is open, showing a list of views: 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 (highlighted with a red box), and Save Filters to Current View. A "Start" button is visible at the bottom left of the dropdown menu.

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.

The screenshot shows a form titled "Save as new View" with a close button (X) in the top right corner. The form has two main input fields: "Name *" and "Description". The "Name *" field is highlighted with a red box and contains the text "NUIG - Active Application Folders". Below the "Name *" field is the "Description" field. At the bottom of the form, there are two buttons: "Save" and "Cancel". The "Save" button is highlighted with a red box.

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