

LSAC Unite

Updated June 6, 2024

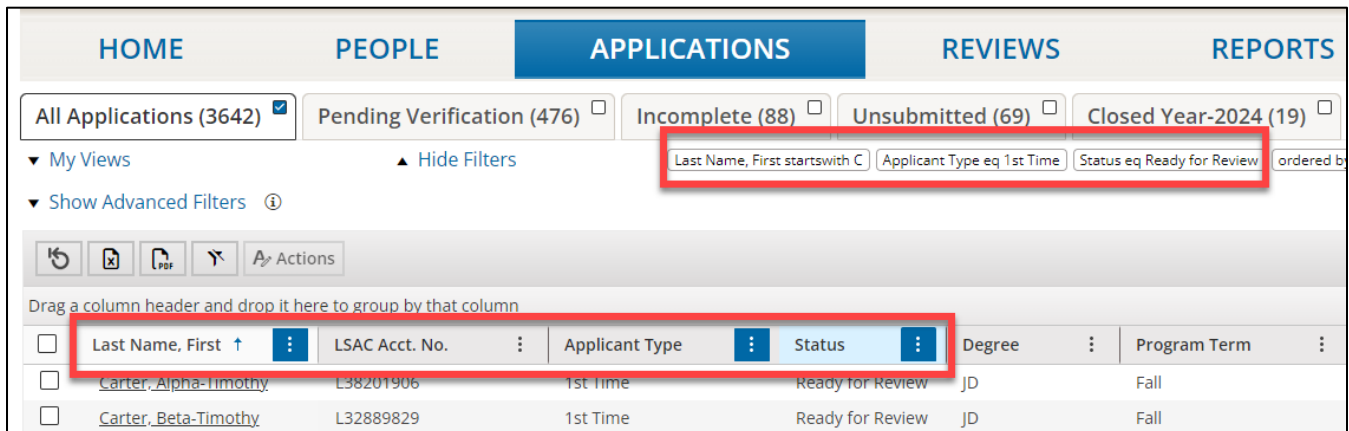
Using Advanced Filters

Grids and Views are powerful tools in Unite: filtering, sorting, showing and hiding columns all work to bring forward information you need. Saving Views allows you to return to a grid that you have organized and see information updated in real time. With Advanced Filters, you can create grids and views with even more nuance and flexibility. Advanced Filters are available on every grid except for the Recents grid in the PEOPLE area and Unsubmitted grid in the APPLICATIONS area.

Benefits of Advanced Filters

When using standard filters on multiple columns in grids, the filters work together in a cumulative way, effectively with an “and” operator between each column field. For example, a grid with the last name column filtered to show people whose last names start with the letter C, the applicant type column filtered to show first time applicants, and the application status filtered to show applications with a status of ready for review, will show people who meet all these criteria combined:

- whose last names start with C, and
- whose applicant type is First Time, and
- whose application status is Ready for Review.



The screenshot shows the 'APPLICATIONS' tab in the LSAC Unite interface. At the top, there are navigation tabs: HOME, PEOPLE, APPLICATIONS (selected), REVIEWS, and REPORTS. Below the tabs, there are filter buttons: 'All Applications (3642)', 'Pending Verification (476)', 'Incomplete (88)', 'Unsubmitted (69)', and 'Closed Year-2024 (19)'. A 'My Views' section shows a view named 'Last Name, First startswith C | Applicant Type eq 1st Time | Status eq Ready for Review | ordered by'. Below this, there are icons for refresh, delete, print, and actions. A table below shows the filtered results:

	Last Name, First ↑	LSAC Acct. No.	Applicant Type	Status	Degree	Program Term
<input type="checkbox"/>	Carter, Alpha-Timothy	L38201906	1st Time	Ready for Review	JD	Fall
<input type="checkbox"/>	Carter, Beta-Timothy	L32889829	1st Time	Ready for Review	JD	Fall

In contrast, with Advanced Filters it is possible to show people who meet different sets of criteria on the same grid. For example, we may want to see people who have either an undergraduate degree from a school or a graduate degree from the same school. With standard filters it would be necessary to build two separate grids and views: one to show those with undergraduate degrees from the school of interest, and one to show those with graduate degrees from the school of interest.

The screenshot shows a web interface for managing applications. At the top, there are several filter buttons: 'All Applications (3642)', 'Pending Verification (476)', 'Incomplete (88)', 'Unsubmitted (69)', and 'Closed Year-2024 (19)'. Below these is a 'Search Criteria' button. The main area is titled 'My Views' and includes a 'Hide Filters' button and a sorting option 'ordered by Last Name, First asc'. A 'Hide Advanced Filters' button is also present. A red box highlights the 'Advanced Filters' configuration area, which includes an 'And/Or' selector, 'Add Expression', and 'Add Group' buttons. Two filter expressions are visible: 'Graduate School Includes NEWTOWN UNIVE...' and 'Undergraduate School Includes NEWTOWN UNIVE...'. A red arrow points from this configuration area to a preview window on the right titled 'ADVANCED FILTERS', which displays the resulting logic: 'Graduate School Includes "NEWTOWN UNIVERSITY" OR Undergraduate School Includes "NEWTOWN UNIVERSITY"'. Below the filter configuration is a table with columns: 'Last Name, First', 'LSAC Acct. No.', 'Undergraduate School', 'Graduate School', 'Applicant Type', 'Degree', and 'Program Term'. The table contains two rows of data: one for 'Benatoar, Pat' and one for 'Dean, James'.

	Last Name, First ↑	LSAC Acct. No.	Undergraduate School	Graduate School	Applicant Type	Degree	Program Term
<input type="checkbox"/>	Benatoar, Pat	L39234552	NEWTOWN UNIVERSITY	THE UNIVERSITY OF TEXA...	1st Time	JD	Fall
<input type="checkbox"/>	Dean, James	L39234757	BOISE STATE UNIVERSITY	NEWTOWN UNIVERSITY	1st Time	JD	Fall

Elements of Advanced Filters


Advanced Filters are made up of Expressions and Groups. An Expression is one criterion for the results in the grid; a Group is made up of multiple expressions and represents a set of criteria for the results in the grid. Expressions are made up of three dropdown menus:


1. The first dropdown contains field names which correspond to the active columns (fields) in the grid.
2. The second dropdown displays the various operator options which are determined by the type of field chosen. Examples of operators are “greater than or equal to” for a date or number, “starts with” for a name, or “include” for a status or applicant type.
3. The third dropdown offers a value field, where you can select or enter in a value. Some fields will have default values (note: at this time, there are no multiselect options. You must select each item individually or use the grid filters).

Relationships between Groups or Expressions are controlled by choosing an “AND” or “OR” operator above the Group or Expression lines. There is no system limit to the number of advanced filter Groups or Expressions you can use; the only limit is what is practical to show the desired results in the grid.

Creating and Applying Advanced Filters

1. In Unite, select the area (**PEOPLE, APPLICATIONS, or REVIEWS**) and the grid within the area that you want use.
2. Organize the grid to show the columns you will use for filtering.

- a. On any column header, click the ellipsis. 

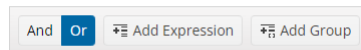
- b. Select Columns from the grid menu. 

- c. In the column chooser, select the check box for each column you want to show; deselect the check box for any column you do not want to show.

- d. Select Save. 

3. Select Show Advanced Filters.

4. Select “Add Group.”



5. Select “Add Expression.”

6. The Operator value is set to “And” by default. Select “Or” to control the relationship between the criteria.

7. In the first drop down menu of the Expression line, select the field to filter. Note that the field must show on the grid to use it for filtering.

8. In the second drop down menu of the Expression line, select the appropriate operator. The options here will vary depending on the type of field you are filtering.

9. In the third drop down menu of the Expression line, select the value for the information you are filtering. The options here will vary depending on the field values.

10. Repeat steps 4 through 9 as necessary to create a new Group of Expressions and/or add Expressions to add filtering to other fields.
11. If it is necessary to remove an Expression row, select the “X” button for the row. To remove an entire Group, select the “X” button on the Group’s mini toolbar.
12. Notice that as Expressions and Groups are selected, the resulting filter text is updated on the page to illustrate the impact of each selection.

ADVANCED FILTERS

(Graduate School *Includes* "**NEWTOWN UNIVERSITY**" OR Undergraduate School *Includes* "**NEWTOWN UNIVERSITY**")

13. If it is necessary to start over, all constructed filters can be removed by selecting the “Clear” button.

14. To apply the filters, select “Filter.”

15. Once the grid is filtered to show the information you want, it is possible to create a view in the standard way.

- a. Select My Views.
- b. Select Create New View.
- c. In the View Name text box, enter a name for the view.
- d. Select Share View if this view is one that colleagues in the Admissions office will use.
- e. Select Save.