

# How to Filter Items

The Narrow Choices panel, located on the left side many list-based screens and dashboards, allows you to find items based on specific values/qualities.

The screenshot displays a software interface with a top navigation bar containing 'User Home', 'Inbox', 'Work Area', 'Metrics', and 'More'. Below this is a secondary navigation bar with 'ALL STUDIES', 'Inbox', 'ALL COUNTRIES', and 'ALL SITES'. The main content area is divided into two sections: a 'NARROW CHOICES' panel on the left and a list of items on the right.

The 'NARROW CHOICES' panel is titled 'NARROW CHOICES' and contains several filter categories, each with a count of items:

- Task Owners:** 0 of 2
  - My Tasks 18
  - Group Tasks 42
- Task Type:** 0 of 1
  - QC 60
- Due Date:** 0 of 3
  - Before Today 53
  - None 8
  - Custom
  - Start Date:
  - End Date:
- Task Due Date:** 0 of 1
  - None 60
- Process Type**
- IP Green Light**
- Document Language**
- Category**
- Organization**
- Task Creation Date**
- Task Acquisition Date**
- Document Type**
- Level**
- Milestone**
- Document Date**
- Receipt Date**

The main list area shows '60 ITEMS FOUND' and a message 'Use filters on the left to further narrow results.' The list contains several items, each with a document icon, a title, and metadata:

- QC: Committee Member Financial Disclosure Form - 23-Jul-2018**  
Ref Model ID: 01.03.05 Doc Type ID: 100.28  
1245.94  
Task Creation Date: 27-Jul-2018 2:57:50 PM  
Task Acquisition Date: 07-Nov-2018 12:36:09 PM  
Task Owner: Ned Norris
- QC: Edit Check Programming (Paper) - 01-May-2018**  
Ref Model ID: 10.03.03 Doc Type ID: 110.09  
1245.94  
Due Date: 05-Mar-2018  
Task Creation Date: 25-May-2018 5:09:28 AM  
Task Acquisition Date: 25-May-2018 5:11:12 AM  
Task Owner: Ned Norris
- QC: Re-labeling Documentation (Site Level) - 06-Feb-2014(+3 more)**  
Ref Model ID: 06.01.07 Doc Type ID: 106.12  
M10-984 / ARGENTINA / 1003  
Due Date: 26-Nov-2014  
Task Creation Date: 12-Mar-2018 8:27:29 AM  
Task Acquisition Date:  
Task Owner: TMF QC Role
- QC: Final Trial Close Out Monitoring Report - 01-Mar-2018**  
Ref Model ID: 05.04.08 Doc Type ID: 105.44  
M10-984 / ARGENTINA / 1003  
Due Date: 12-Dec-2016  
Task Creation Date: 06-Mar-2018 8:20:07 AM  
Task Acquisition Date: 06-Nov-2018 1:43:02 PM  
Task Owner: Ned Norris
- QC: Coordinating Investigator Documentation - 04-Nov-2015(+1 more)**  
Ref Model ID: 05.02.20 Doc Type ID: 105.52  
156-12-809-01 / UNITED STATES  
Due Date:  
Task Creation Date: 22-Feb-2018 9:45:18 AM  
Task Acquisition Date: 06-Nov-2018 1:44:05 PM  
Task Owner: Ned Norris
- QC: Informed Consent Form (Site Level) - 01-Oct-2013**

Values in the Narrow Choices panel are organized by category. The categories and values displayed depend on the view being accessed. For example, the Narrow Choices panel in the Inbox view contains a category for Task Due Date that is not relevant or available in the Narrow Choices panel in other views. The number next to each value in the Narrow Choices panel indicates the number of items in the list to which that value applies.

If a category contains more than five values, a [View All](#) link is shown underneath the fifth value in the category. Clicking this link either displays the rest of the values or opens a separate window from which you can view all possible values in

the category.

If you want to hide the Narrow Choices panel to get a larger view of the items list, click the Show/Hide Filters button at the top right of the panel (i.e., the arrow enclosed by a circle).

## **Define a Filter**

To filter down the displayed items, expand a category and select the check box next to a value in the Narrow Choices panel. This will add a filter value above the list in the Filter Summary bar and will automatically update the list to include only those that apply. You can select as many check boxes as you like to apply multiple filter values. When multiple check boxes are selected, only items that meet all criteria are displayed.

To remove a single value from a filter, either deselect the box next to the value in the Narrow Choices panel or select the X next to the value in the Filter Summary bar. All filter values can be cleared by clicking the trash can icon in the Filter Summary bar or by clicking the Actions menu icon at the top of the Narrow Choices panel and selecting “Clear Filters.”

## **Saving a Filter**

You can [save](#) a filter that you commonly use so that you can easily apply the criteria later. Click the link to learn more.