samegoal

Form Filtering on List Pages

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Related:

- August 2, 2024: Deadlines Filter
- March 10, 2023: Building Filtering on List Pages
- December 16, 2022: Student Filtering on List Pages

Users can now visit any list page within SameGoal (i.e. Caseload, All, Students Documents Pages, and Users Documents Pages) and filter on form types using the Form Filter dropdown. This feature will allow for quicker selection of documents when doing case management.

By default all form types are selected as all form types are shown when the list page is first entered. To use the form filter dropdown:

1. Visit the desired list page (i.e. Caseload, All, Students Documents Pages, and Users Documents Pages).
2. Click the **Form Filter** dropdown menu in the blue bar.
3. Click the **Clear** link.
4. Scroll through the available form types or type the name of the desired form type in the **Search** bar. Note: As you type all possible form types that match your typing will appear.
5. Click the checkbox next to the form type you would like to view. Repeat steps 4 and 5 until all desired form types have been selected.
6. Click **OK**.
7. Only the selected form types will now be visible. To go back to the default view of all form types, visit the **Form Filter** dropdown menu > click the **Select all** link > click **OK**.