

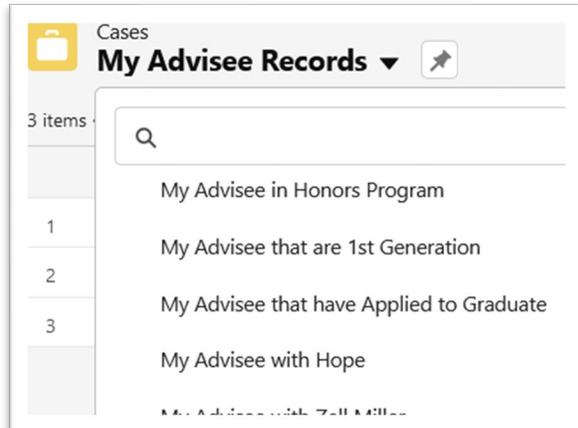


Customize a Case List View

This help document is a companion to Use Case List Views to focus advising on smaller populations of your advisees

Scenario: You have located a Case List view but you would like to narrow the multiple majors that you service and would like to save that new view for quick reference.

Select a list to customize:



Clone the list:

Clone List View

* List Name
RW My Advisee Records

* List API Name ⓘ
RW_My_Advisee_Records

Who sees this list view?

Only I can see this list view

All users can see this list view ⓘ

Share list view with groups of users ⓘ

Give your new List View a meaningful name. I have added my initials to the front of the list view so that I will know this is just for me.

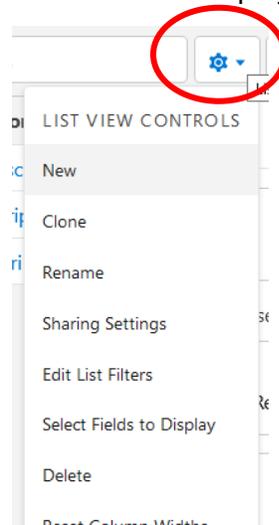
Select who can see your new case list view.
At this time please use "Only I can see this list view."

Cancel Save

- Give your cloned List View a name.
- Make sure only you can see the list view - "Only I can see this list view.". Selecting the other settings may allow the list to be viewed by groups outside of Undergraduate Advising.
- Click Save

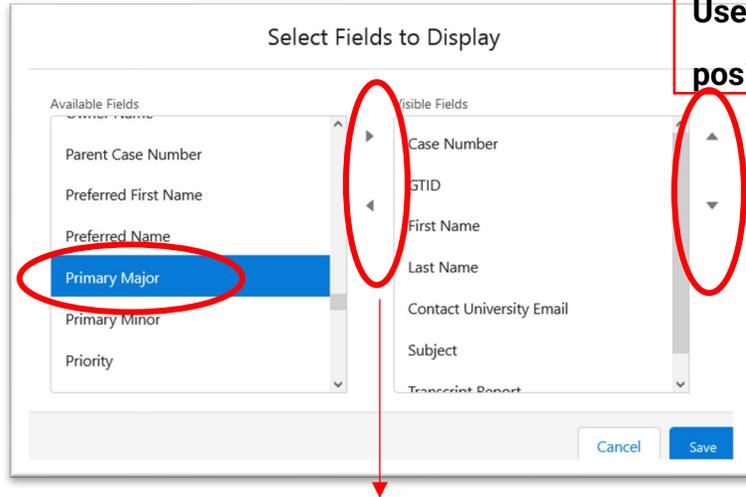
When you save the cloned list view the filters will automatically be displayed but we need to see the Primary Major column first.

Click the Setting cog and then "Select Fields to Display".





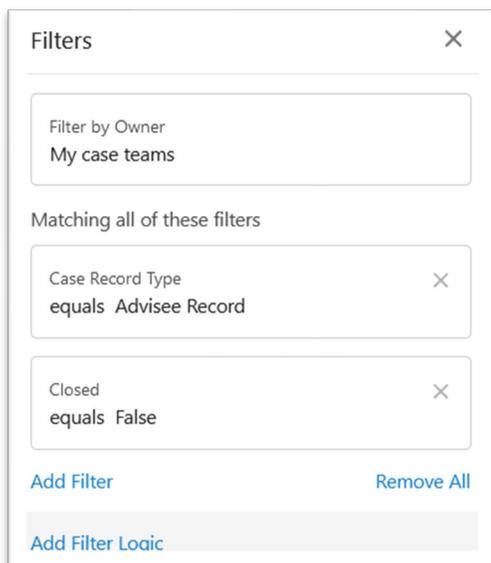
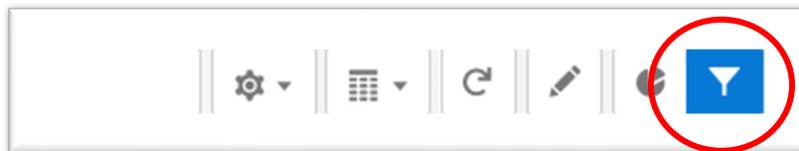
Select the field to add



Use arrows to position the fields.

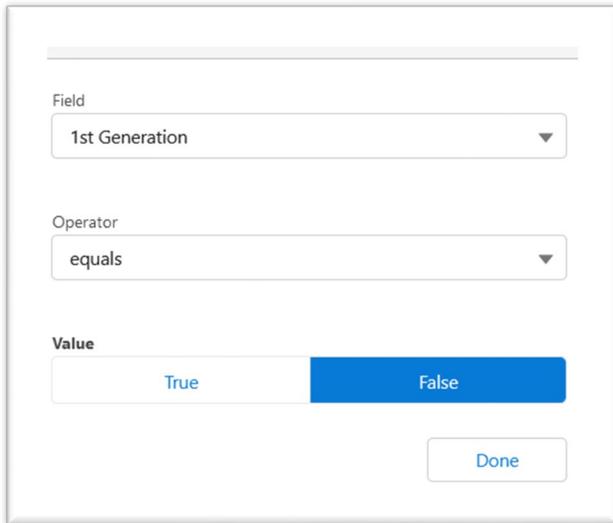
Use the Arrows to add or remove a field.

Click on Show Filters button.



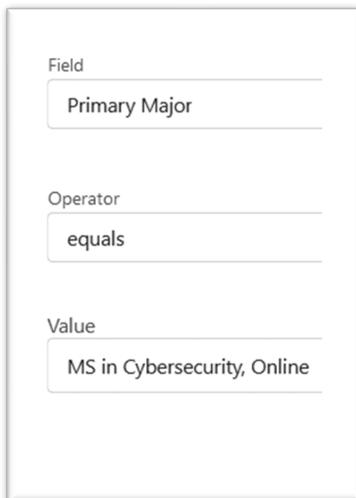
Click Add Filter

For our example I will select Primary Major from the Field drop down here:



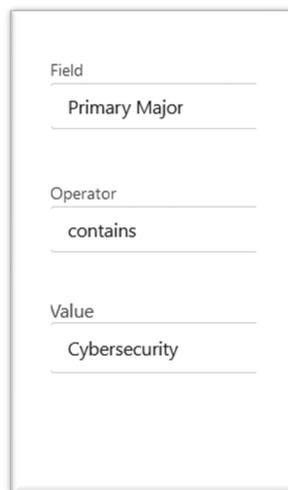
A screenshot of a filter configuration dialog box. It contains three sections: 'Field' with a dropdown menu showing '1st Generation', 'Operator' with a dropdown menu showing 'equals', and 'Value' with two radio buttons, 'True' and 'False', where 'False' is selected. A 'Done' button is located at the bottom right.

With Primary Major selected – enter the exact major name with the Operator set to equals OR use the Operator contains and use a key word for the major.



A screenshot of a filter configuration dialog box. The 'Field' dropdown shows 'Primary Major', the 'Operator' dropdown shows 'equals', and the 'Value' text input contains 'MS in Cybersecurity, Online'.

OR



A screenshot of a filter configuration dialog box. The 'Field' dropdown shows 'Primary Major', the 'Operator' dropdown shows 'contains', and the 'Value' text input contains 'Cybersecurity'.

Remember you are editing your own case view. Feel free to use any of the available fields and operators. Another example would be to use the Credits Earned Field with

the Greater or Equal Operator to get a list of students that have passed a milestone based on Credits Earned.