

NEOGOV

Insight Enterprise

Filtering Training Guide

Insight Enterprise

Filters allow Insight users to specify criteria and receive a listing of applicants who meet the specified criteria. Criteria used for filtering can consist of basic filter criteria from the standard application questions; agency-wide questions, job specific supplemental questions, application received date, online/paper application, notification preference, or score.

Some examples of how filters that you might want to create include:

- Applicants who are considered transfer candidates
- Applicants who meet minimum qualifications
- Applicants who are willing to work nights and weekends
- Applicants who are willing to work at a specific facility or geographical region
- Applicants who speak Spanish
- Applicants who applied during a specified time frame
- Applicants who are veterans
- Applicants who received above a certain percentage on a written exam

Filters:

How Do Evaluation Step Filters Work?

Filters for evaluation steps and eligible lists allow users to specify criteria and receive a listing of applicants within the evaluation step or on the eligible list who meet the specified criteria. Filtering goes beyond search elements of basic application information, Agency-Wide Question responses and Job-Specific Supplemental Question responses. To add to this list, filters can be created using Applicant Master Profile and Applicant Step data.

Filters on evaluation steps and eligible lists can be saved and used again with the exam plan from which they were created. In addition, these filters can be shared with other users within any exam plans they are applicable to.

Filters are divided up into two major categories: Evaluation Step Filters and Eligible List Filters.

A. Evaluation Step Filters

Evaluation Step Filters are those filters you use to search for candidates while they are within your Exam Plan's Evaluation Steps. These filters can be as simple or complex as you need and can span across multiple search elements.

Search elements for Evaluation Step Filters include:

- Applicant Master Profile
- Application
- Agency-Wide Questions
- [Job-Specific] Supplemental Questions
- Applicant Step

Insight Enterprise

Add and Apply Evaluation Step Filter

You have one of two paths to add an Evaluation Step Filter:

Option 1: from the **View Applicants by Step** page (while you're working with the candidate records),

Candidate	Person ID	Master Profile	Disposition	SME	Email Notify	Source	Received	Notices	Audit Trail
<input type="checkbox"/> Applicant_Alex	5353588	View	● Pass		<input type="checkbox"/>	Paper	09/15/16 01:48 PM	N/A	View
<input type="checkbox"/> Applicant_Kim	5353705	View	● Pass		<input type="checkbox"/>	Online	09/26/16 09:22 AM	N/A	View
<input type="checkbox"/> Cruz_Nelson	5378119	View	● Pass		<input type="checkbox"/>	Paper	05/12/17 09:14 AM	N/A	View
<input type="checkbox"/> Derting_William	5369807	View	● Pass		<input type="checkbox"/>	Paper	09/15/16 03:51 PM	N/A	View
<input type="checkbox"/> Jones_Jason	5354104	View	● Pass		<input type="checkbox"/>	Paper	09/15/16 01:49 PM	N/A	View
<input type="checkbox"/> Oderman_Wayne	5313079	View	● Pass		<input type="checkbox"/>	Online	09/15/16 02:08 PM	N/A	View
<input type="checkbox"/> Robertson_Mary	5369808	View	● Pass		<input type="checkbox"/>	Paper	09/15/16 03:52 PM	N/A	View
<input type="checkbox"/> Rogers_Samantha	5369809	View	● Pass		<input type="checkbox"/>	Paper	09/15/16 03:54 PM	N/A	View
<input type="checkbox"/> Splith_Jordan	5353509	View	● Pass		<input type="checkbox"/>	Paper	09/15/16 01:54 PM	N/A	View
<input type="checkbox"/> Wilson_Jennifer	5369922	View	● Pass		<input type="checkbox"/>	Online	09/26/16 09:28 AM	N/A	View
<input type="checkbox"/> Wilson_Russell	5354132	View	● Pass		<input type="checkbox"/>	Paper	09/15/16 03:49 PM	N/A	View
<input type="checkbox"/> Young_Allison	5369921	View	● Pass		<input type="checkbox"/>	Paper	09/26/16 09:18 AM	N/A	View

12 Records Found Page: 1 of 1

== Select Action == → == Select Candidate(s) == Go

- == Select Action ==
- Email Notify
- Mail Merge & Mailing Labels
- Advance to Next Step
- Place on Priority List
- Change Disposition
- SME Review
- Archive
- Unarchive
- Advanced Filter ←
- Print Applications
- Bulk Application Update
- Go To: Minimum Qualifications Review
- Go To: Multiple Choice Written Exam

OR from the **Exam Plan Detail** page (the main page for your Exam Plan record).

Advanced Filters [Add Evaluation Step Filter](#) [Add Eligible List Filter](#)

Title	Created By	Filter Type	Action
(85% or above on written) OR (72% or above on written and a CFM certification)	Evan Oderman	Evaluation Step Filter	View Edit Delete Share
Minimum Qualifications	Evan Oderman	Evaluation Step Filter	View Edit Delete Un-share
Seattle and nights and weekends	Evan Oderman	Eligible List Filter	View Edit Delete Share
Transfer Candidates	Evan Oderman	Evaluation Step Filter	View Edit Delete Share

Both paths lead to the final outcome of creating a new Evaluation Step Filter.

Insight Enterprise

When you create an Evaluation Step filter from the View Applicants by Step page, you're likely in the midst of working with the candidate records and need to perform some type of search function.

1. From the Exam Plan Detail page, click 'View Applicants by Step' and expand an Evaluation Step that contains application records that require some type of filtering.
2. From the Select Action drop-down field, select 'Advanced Filter'.
3. From the Select Candidate(s) drop-down field, select the applicable candidate value base your filter upon (e.g., 'All').
4. Click 'Go'.
5. Click 'Add Filter'.
6. Input a descriptive name into the Name field.
7. Select whether or not you wish to share your filter. (Remember, sharing your filter allows other users to view and apply (but not edit) your filters within other exam plans that they are applicable to.)
 - a. Note: You'll likely return back and select Share Filter once you have determined that your filter is properly constructed.
8. Input your first search criteria in the condition line:
 - **Object:** This is from where the data will be pulled. Select Agency Wide Questions, Applicant Master Profile, Applicant Steps, Application, or Supplemental Questions.
 - **Field:** Select the field on which you're basing your search condition. You will see applicable fields depending on which '**Object**' you have selected.
 - **Operator:** Select the function that yield the records that you're expecting to see.
 - Quick tips: For exact matches, select 'Equal'. For less exact matches, use the Contains operator (e.g., the Work Type field contains Full Time and/or Part Time values), or the Begins with operator (County of Residence begins with "Atlantic County").
 - Operator options are as follows:
 - Begins with – Where values that start with a specific string of text are found in result
 - Contains (IN) – Where any value selected is found in result
 - Contains All – Where all values selected are found in result
 - Does Not Contain (Not IN) – Where value specified is not included in result
 - Equal (=) – Where result is an exact match
 - Equal Field (=) - *Not in use at this time*
 - Not Equal (<>) - Where value is not found in result
 - Not Equal Field (<>) – *Not in use at this time*
 - **Value:** Input the field value for which you're basing your search.
9. If your filter only contains one search condition, you're free to click 'Save'; however, if you would like to refine your search, add additional condition lines by click 'Add Condition'.
10. Notice that your subsequent condition lines are connected with AND/OR logic; change these values to best match your filter statement.

11. If your filter is advanced and requires combining AND and OR condition lines, then click 'Add Group'.
12. Once you have completed your entire filter statement, click 'Save'.
13. Upon saving you're returned back to the page allowing you to apply, or execute your Evaluation Step filter; click 'Apply'.
14. Your Evaluation Step will display, THIS STEP IS FILTERED.

After your application records are filtered, you're free to carry on with other tasks, e.g., change Disposition values, send notices, etc.

Insight Enterprise

The following are a few Evaluation Step Filter examples.

Filter Example 1 – Applicants who are current employees **AND** are currently in the Maintenance Worker 2 job class.

Name:

Share Filter:

[Add Group](#)

Delete	Object	Field	Operator	Value
Add Condition				
<input type="checkbox"/>	Applicant Master Profile	Current Employee	Equal (=)	Yes
<input type="checkbox"/>	AND	Supplemental Questions	If you are a current Desert Coun	Equal (=)

Filter Example 2 - Applicants who meet the following minimum qualifications: An Associate's degree and at least two years of building maintenance and repair work experience **OR** A high school diploma or equivalent and a Certified Facilities Manager (CFM) certification.

[Back To Exam Plan](#)

Name:

Share Filter:

[Add Group](#)

Delete	Object	Field	Operator	Value	
Add Condition					
<input type="checkbox"/>	Supplemental Questions	What is your highest level of ed	Contains (IN)	Select Associate's degree Bachelor's degree High school diploma or GED Master's degree	
<input type="checkbox"/>	AND	Supplemental Questions	How many years of professional	Contains (IN)	Select 3 or more years experience At least 1 year but less than 2 years At least 2 year but less than 3 years Less than 1 year experience
--OR--					
Add Condition					
<input type="checkbox"/>	Supplemental Questions	Do you currently hold a Certific	Equal (=)	Yes	
<input type="checkbox"/>	AND	Supplemental Questions	What is your highest level of ed	Does Not Contain (NOT IN)	Bachelor's degree High school diploma or GED Master's degree Some college Some high school

Insight Enterprise

Filter Example 3 - Applicants who scored an 85% or above on the written exam **OR** scored a 72% or above on the written exam **AND** hold a Certified Facilities Manager (CFM) certification

Name: (85% or above on written) OR (72% or above on written and a CFM certification)

Share Filter:

[Add Group](#)

Delete	Object	Field	Operator	Value
<input type="checkbox"/>	Applicant Steps	Step Percentage Score	Greater Than (>)	84
--OR--				
<input type="checkbox"/>	Applicant Steps	Step Percentage Score	Greater Than (>)	71
<input type="checkbox"/>	AND	Supplemental Questions	Do you currently hold a Certificac	Equal (=) Yes

Option 2: The second path that can be taken to create an Evaluation Step filter is from a directly from the Exam Plan Detail page. When you create an Evaluation Step filter from the Exam Plan Detail page, you're "planning ahead," creating a filter that will be used at a later time. The act of applying or executing the filter can only be done from the View Applicant by Step page.

- From the Exam Plan Detail page, Advanced Filters section, click 'Add Evaluation Step Filter'. You can also share or un-share your filters from this section.

[Advanced Filters](#) [Add Evaluation Step Filter](#) [Add Eligible List Filter](#)

Title	Created By	Filter Type	Action
(85% or above on written) OR (72% or above on written and a CFM certification)	Evan Oderman	Evaluation Step Filter	View Edit Delete Share
Minimum Qualifications	Evan Oderman	Evaluation Step Filter	View Edit Delete Un-share
Seattle and nights and weekends	Evan Oderman	Eligible List Filter	View Edit Delete Share
Transfer Candidates	Evan Oderman	Evaluation Step Filter	View Edit Delete Share

- From here to the point of saving your Evaluation Step filter, it is the same process as described in Option 1 above.
- You can preview filters from this page by clicking the 'View' link.

[Advanced Filters](#) [Add Evaluation Step Filter](#) [Add Eligible List Filter](#)

Title	Created By	Filter Type	Action
(85% or above on written) OR (72% or above on written and a CFM certification)	Evan Oderman	Evaluation Step Filter	View Edit Delete Share
Minimum Qualifications	Evan Oderman	Evaluation Step Filter	View Edit Delete Un-share

Eligible List Filters

Once some candidates move through all of your Evaluation Steps and on to the Eligible List, Eligible List Filters can then be utilized. Because Evaluation Step Filters and Eligible List filters share the same setup tool, the process to create these two types of filters is exactly the same. Like Evaluation Step Filters, Eligible List Filters can be as simple or complex as you need and can span across multiple search elements.

Search elements for Eligible List Filters include:

- Applicant Master Profile
- Application
- Agency-Wide Questions
- [Job-Specific] Supplemental Questions

Add and Apply an Eligible List Filter

Once again, you have one of two paths to add an Eligible List Filter: from the Eligible Candidates page (while you're working with the candidate records), or from the Exam Plan Detail page (the main page for your Exam Plan record). Both paths lead to the final outcome of creating a new Eligible List Filter.

Option 1:

1. From the Exam Plan Detail page, Eligible Lists section, click 'View Candidates' for an eligible list containing candidate records that require some type of filtering.
2. From the Select Action drop-down field, select 'Advanced Filter'
3. From the Select Candidate(s) drop-down field, select the applicable candidate value base your filter upon (e.g., All Candidates).
4. From here to the point of saving your Eligible List filter, it is the same process!
5. Upon saving you're returned back to the page allowing you to apply, or execute your Eligible List filter; click 'Apply'.
6. Your Eligible Candidates page will display, Filter returned X records.

After your candidate records are filtered, you're free to carry on with other tasks, e.g., reactive candidates, apply preference points, send notices, etc.

Option 2:

The second path that can be taken to create an Eligible List filter is from a directly from the Exam Plan Detail page.

- From the Exam Plan Detail page, Advanced Filters section, click 'Add Eligible List Filter'.
- From here to the point of saving your Eligible List filter it is the same process!
- Note that you can only apply your saved Eligible List filter from the Eligible Candidates page.

Insight Enterprise

The following is an example of an Eligible List Filter.

Filter Example 4 - Applicants who are willing to work in Seattle **AND** are willing to work nights and weekends.

Name:

Share Filter:

[Add Group](#)

Delete		Object	Field	Operator	Value
<input type="checkbox"/>		Supplemental Questions ▼	This recruitment is being used to ▼	Equal (=) ▼	Seattle ▼
<input type="checkbox"/>	AND ▼	Application ▼	Shift Type ▼	Contains All ▼	Evening Night Rotating Weekends On Call (as needed) ▼

Once you have saved your Eligible List filters, they display under the Advanced Filters section on the Exam Plan Detail page. The Filter Type column will indicate whether it is an Evaluation Step Filter or Eligible List Filter.

[Advanced Filters](#) [Add Evaluation Step Filter](#) [Add Eligible List Filter](#)

Title	Created By	Filter Type	Action
(85% or above on written) OR (72% or above on written and a CFM certification)	Evan Oderman	Evaluation Step Filter	View Edit Delete Share
Minimum Qualifications	Evan Oderman	Evaluation Step Filter	View Edit Delete Un-share
Seattle and nights and weekends	Evan Oderman	Eligible List Filter	View Edit Delete Share
Transfer Candidates	Evan Oderman	Evaluation Step Filter	View Edit Delete Share