# How Do I Create & Manage Filters

A Filter can be used to assign flexible replay permissions by filtering a user's search results. You can apply single or multiple filters as needed and a filter can allow or deny access to recorded communications that match one or more search criteria.

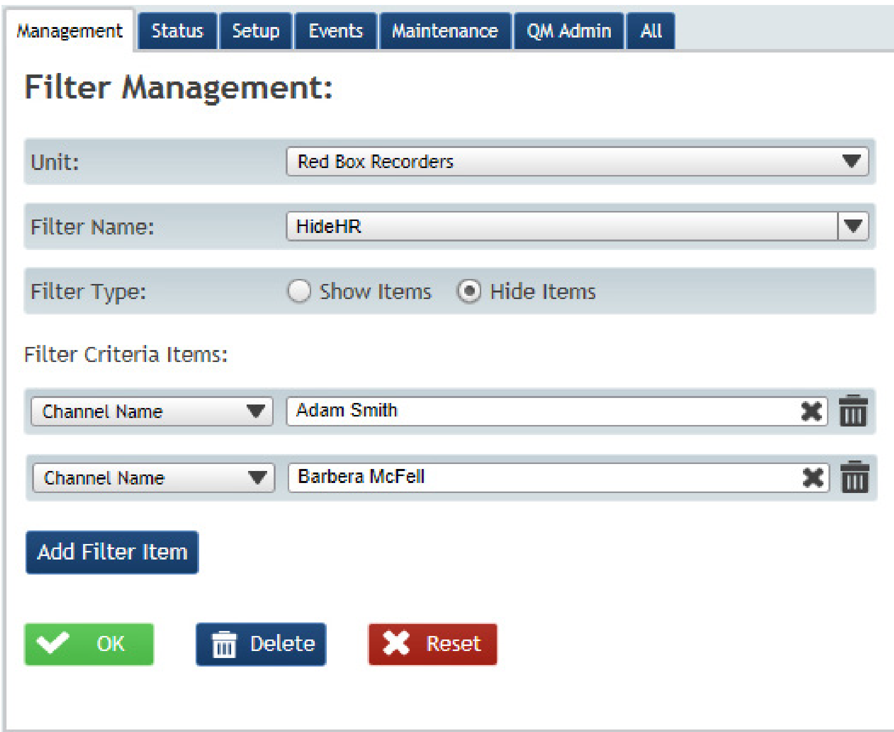
Note that filters do **not** apply to Quantify Live Acquire permissions.

## Create a Filter

**To create a filter:**

1. Login to Quantify with an administrator account (System Configuration permissions).
2. Go to **Configuration** > **Management** > **Filter Management**.
3. Select your **Filter Type** — click **Show Items** or **Hide Items** (that is, show or hide items in search results).
4. Add your filter criteria — click **Add Filter Item**, select a database field and enter the data to match. You can also use the "**%**" wildcard character to broaden your criteria and ensure a match.
5. Click **Add Filter Item** to add further criteria — see "Multiple Criteria, Multiple Filters" on page 3.
6. In the **Filter Name** field, type a name for your filter.
7. When you're done, click **Ok** to create your filter.

- In the sample filter shown in the screenshot below, this filter will **hide all** recorded communications **to/from** "Adam Smith" **and to/from** "Barbera McFell".



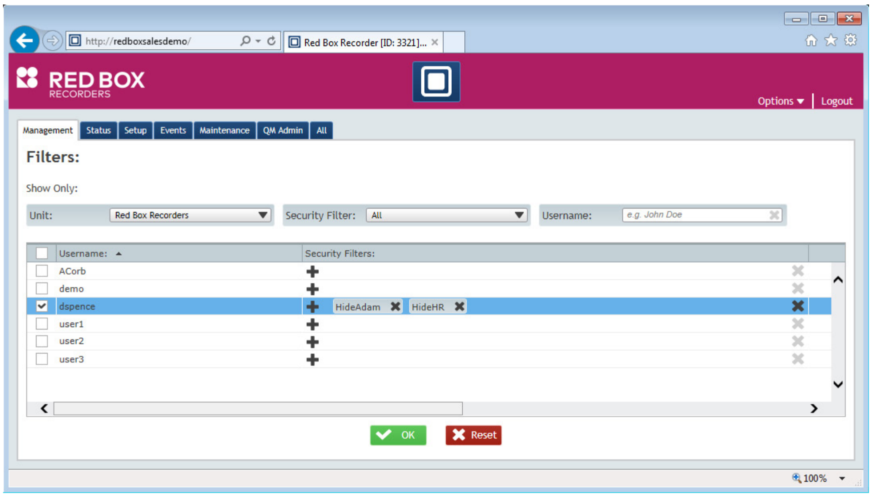

Your Red Box system may look different to the one used in this document.

## Apply/Remove Filters

Once you've created filters, you need to apply them to your Quantify users in order to assign the appropriate replay permissions, as described below. Also, see "Multiple Criteria, Multiple Filters" and "Assign Replay Permissions" on page 3 for more detailed information.

**To apply filters:**

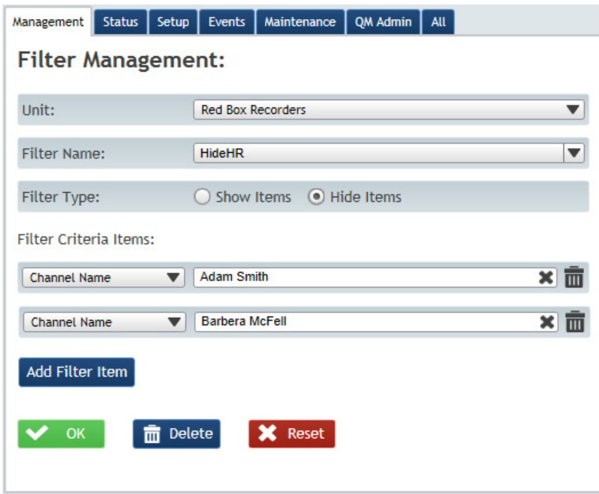
1. Go to **Configuration** > **Management** > **Filters**.
2. To apply/remove filters to/from Quantify users, click the **+** and **✕** icons. You can apply single or multiple filters to each user as needed.
3. When you're done, click the **Ok** button to apply your changes.




## Review, Edit or Delete a Filter

**To review, edit or delete a filter:**

1. Go to **Configuration** > **Management** > **Filter Management**.
2. Select the filter to review/edit using the **Filter Name** drop-down menu:
   - To add criteria, click the **Add Filter Item** button.
   - To remove criteria, click the 🗑 **Remove** icon next to the filter criteria.
   - To edit criteria, just edit the filter criteria field and data as needed.
   - To delete the entire filter, click the main 🗑 **Delete** button.
3. When you're done, click the **Ok** button to save your changes.



## Multiple Criteria, Multiple Filters

As stated previously, you can use multiple criteria within individual filters, and you can apply multiple filters to user accounts. When using multiple criteria and multiple filters, consider the following:

- **Multiple Criteria**
  - Multiple filter criteria are applied as a logical **OR**. That is, any recorded communication that matches **any** of the defined criteria is regarded as a match.
- **Multiple Filters**
  - Multiple filters of the same type (show/hide) are applied as a logical **OR**. That is, any recorded communication that matches **any** of the applied filters is regarded as a match.
- **Allow (Show)/Deny(Hide) Replay**
  - To allow replay, you must allow access on **all** applied filters.
  - To deny replay, you only need to deny access on **one** applied filter.

## Assign Replay Permissions

Refer to the *Replay Permissions Quick Question Topic* for more detailed information. The following description provides a brief overview.

Assigning replay permissions defines what recorded communications a user has access to. The three main replay permission methods/types are:

- **Direct** (**All**, **None**, **Specific Field**): Assign via user account settings. Applies to Search & Replay and Monitoring (Live Acquire).
- **Specific Group**: Assign via user account settings. Applies to Search & Replay and Monitoring (Live Acquire).
- **Filters**: Assign via **Configuration** > **Management** > **Filters** (see "Apply/Remove Filters" on page 2). Applies to Search & Replay only.

Choose your method(s) carefully, apply consistently, and try to avoid conflicts. When assigning replay permissions, remember the two main rules:

- To allow replay, you must allow access on **all** applied permission types.
- To deny replay, you only need to deny access on **one** applied permission type.

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