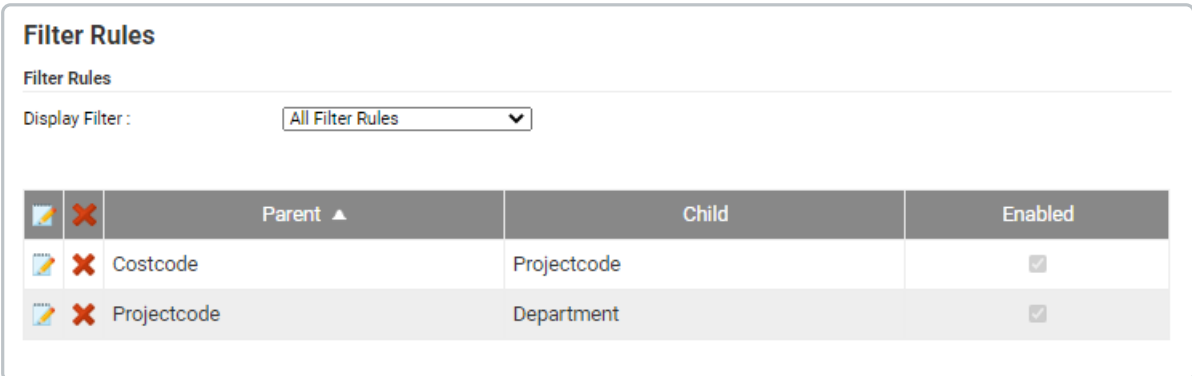# Manage Filter Rules

Permissions

You will require an Access Role with the following permissions:

- Tailoring

Filter rules allow administrators to set parameters which can determine specific criteria shown when a claimant is adding their expense. For example, if a particular cost code is associated with specific project code(s), a filter rule can be set to ensure that when the cost code is selected, only the associated project code(s) will appear in the drop-down list. This feature includes the ability to add filters for Cost Codes, Departments, Addresses, Project Codes and expense Reasons.
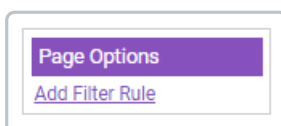
1. Navigate from the **Home** page to **Administrative Settings | Tailoring | Filter Rules**.

2. Ensure that the **Display Filter** drop-down list is set to **All Filter Rules**.

> **Note:** If the parent/child filter rule you need already exists on the list, you cannot add a duplicate but you can edit the existing one.

3. To edit an existing filter rule, click the 📝 icon, or to add a new rule, from the 'Page Options' menu, select **Add Filter Rule**.

4. Choose the **Parent** from the drop-down list. The parent is the primary filter that will determine what sub-filter(s) are available for the claimant to select.

5. Select the **Child** from the drop-down list. It is possible to have more than one child filter associated with each parent.

6. Click the ➕ icon to set your choice and expand the **Filter Rule Value Selection** fields. These field headings will change to match the parent and child that you have selected above.

7. In the first field, type at least 3 letters or numbers of the parent selection. If typed correctly, a list of possible matches will appear allowing you to select the one you want.

8. In the second field, enter the name of the child selection.

9. Click the ➕ icon. The values you selected will be displayed in the Filter Rule Values box.

Add/Edit Filter Rule

Filter Rule

Parent [Department ▾] ❓ Child [Costcode ▾] ❓ ✚

Filter Rule Value Selection

Departments: [ABC123 ▾] Costcodes: [CC1 ▾] ✚

Filter Rule Values

⊟ ✖ ABC123
   ✖ CC1

[save] [cancel]

10. If you want to add additional child filters to this parent, go back to the **Filter Rule Value Selection** section and search for the additional child filter you require.

Add/Edit Filter Rule

Filter Rule

Parent   Department   ⌄   ❓   Child   Costcode   ⌄   ❓   ➕

Filter Rule Value Selection

Departments: ABC123   ⌄   Costcodes: CC2   ⌄   ➕

Filter Rule Values

ABC123
    ✖ CC1
    ✖ CC2

save   cancel

11. To complete the creation of your Filter Rules, click **Save**.