Filtering the CT ILL Policy

Excel’s ‘Auto-Filter’ function helps limit the information visible on a spreadsheet. This feature is available in the CT ILL Policy.

On the policy, notice the little grey boxes in the corners of each of the cells in the top row. Those boxes are for filtering.

For example, say you have a request for a new book...you’d want to limit the policy to show only libraries that lend new books.

You can click the filter for the “Books - New” column and the filter dialogue box will appear.
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In the filter box, you want to select those libraries that say “Yes” (and “Reciprocal” if your library lends new books).

Tip: “Reciprocal” means that the library will lend to you only if your library lends those materials too. In this example, we’ll say that your library also lends new books, so you want to filter the list to both ‘Yes’ and ‘Reciprocal.’

To set the filter, un-check “No” and “Blanks” so that only “New” and “Reciprocal” are checked.

Then click OK.
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The resulting list contains only libraries that will lend new books, i.e. that said Yes or Reciprocal to “Books – New” in the policy.

**Tip:** In the lower left hand corner of the policy, you can see how many libraries lend new books – it’s 86 of 179 (those numbers may change as the policy gets updated).
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You can filter more than one column.

For example, say you want to limit the list further to libraries whose preferred contact is e-mail. You can filter the “Preferred Contact Method” column to “E-mail”.

You can click the filter box, uncheck everything except E-mail, and click OK.

Tip: The “Select All” check box is a toggle...click it and it will check all, click it again, and it will uncheck all. I clicked Select All to uncheck everything, then I checked only “E-mail.”
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Now the list contains only libraries that lend new books and whose preferred contact method is e-mail.

You see that there are currently 75 of 179 that fit this description (those numbers may change as the policy gets updated).

You can use any of the libraries on the resulting list as a potential lender and send them a request for the item.

I can now search the catalogs of these libraries, find the item I need, populate an e-mail message, and send the request to the library.
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When you are done, don’t forget to ‘un-filter’ the list, so that the entire list becomes visible.

To un-filter a column:
- click the filter
- click the “Clear Filter From…” line
- click OK.

You need to clear the filter for each column that you filtered. Once you do that, the full list will be visible.

Note:
- This button means the filter is off in the column.
- This button, with the little funnel, means the filter is on in the column.
Filtering the CT ILL Policy

Some ideas for using filtering in the CT ILL Policy (use as many as apply):

- **Filter by format of items** (columns F – S)
  This will depend on what you are trying to request.

- **Filter by preferred contact method** (column B)
  For example: filter for e-mail if you prefer to send the request by e-mail or FAX if you prefer to send a request by fax

- **Filter by network** (column D)
  For example, if your library is part of a network, you may want to filter your network partners out of the policy, so that the resulting list contains only libraries that are outside of your network.

- **Filter multiple columns**