

# Applying Permanent Filters

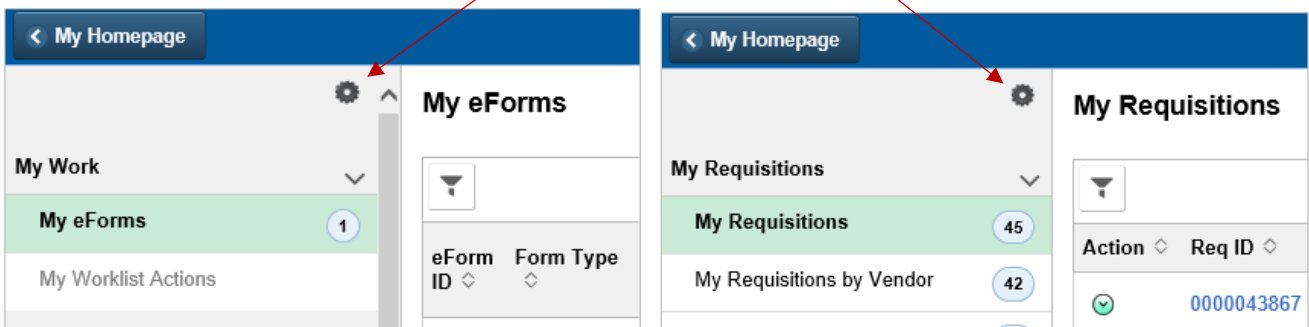
## Introduction

Permanent Filters can be used in both the eProcurement and eForms WorkCenters. By applying a permanent filter you will be limited to the forms or requisitions that you see in your worklists. This type of filter will remain until you modify your filter options.

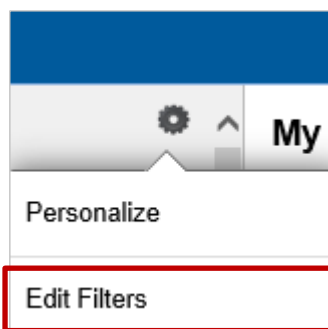
## Procedure

### Filter Permanently

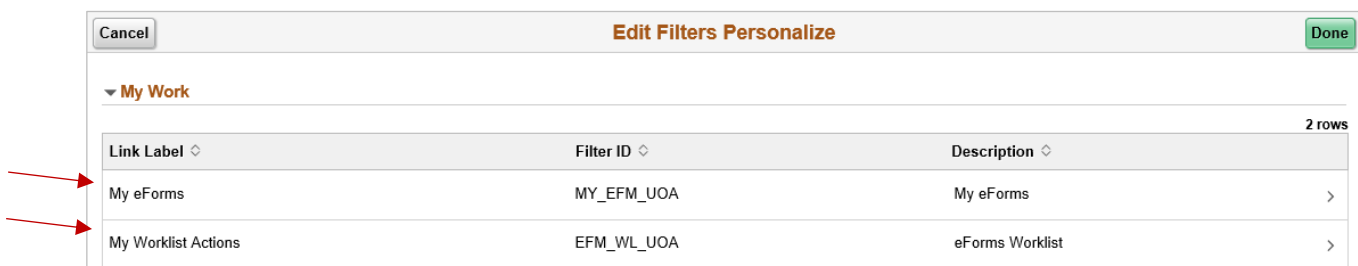
1. Click the Permanent **filter** icon



2. Select **Edit Filters**. If you click Personalize you may receive a message saying that you are not authorized to access this component. If you do, click OK



3. Click on the line of the requisition or eForm options that you want to apply the permanent filter to



- A Configure Filter Values or Refine Filter Criteria window will appear. Follow the eForm or requisition examples

### eForm Example

A **Configure Filter Values** window will appear. In the field you want to permanently filter your eForms by click the **v** arrow for the drop-down menu. You can refine your eForms by more than 1 filter option. These fields are case sensitive.

**For example:** If you only want to view Debt Write-off forms, select **=** or **contains** from the drop-down menu and select **Debt Write-off** from the drop-down menu

- Click **Done**. The eForm line you selected will be filtered according to your filter requirements

**Note:** You can remove the filter by following the same process, but instead of adding a criteria, you remove it and click Done.

### Requisition Example

A **Refine Filter Criteria** window will appear. In the field you want to permanently filter your requisitions by click the **v** arrow for the drop-down menu. You can refine your requisitions by more than 1 filter option. These fields are case sensitive.

**For example:** If you only want to view requisitions with the status of Pending Approval, select **=** from the drop-down menu and select **Pending Approval** from the drop-down menu

6. Click **Done**. The requisition line you selected will be filtered according to your filter requirements

**Note:** You can remove the filter by following the same process, but instead of adding a criteria, you remove it and click Done.

## Contact Us

For further support or questions, please contact the Finance and Procurement Support Team.  
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