Sorting and Applying Temporary Filters

Introduction

Sorting and applying Temporary Filters can be used in both the eProcurement and eForms WorkCentres. Sorting leaves all of the requisitions and eforms in your list but sorts them either numerically or alphabetically. Applying a Temporary filter limits the requisitions and eforms you see in your list based on your filtering choices. This type of filter will remain until you leave the page.

Procedure

Sort

1. Click on the sorting ◇ arrows for the field you would like to sort

My Requisitions

45 rows

Action ◇	Req ID ◇	Req Name ◇	Req Date ◇	Total Amount ◇	Status ◇	Purchase Order ◇	Receipt(s) ◇	Invoice(s) ◇	Total Payments (inc GST) ◇
⊙	0000043867	Paper	25/05/2017	24.75	Received	0000330315	0000404464		
⊙	0000043866	0000043866	25/05/2017	24.75	Approved				
⊙	0000028819	0000028819	21/09/2016	8.80	Complete				
⊙	0000025454	0000025454	17/08/2016	157.88	Complete	0000311907	0000385860	01-323090	166.6

2. The system will sort the columns either numerically or alphabetically.

Requisition Example: if you sort by Req Name, the requisitions are sorted from the lowest to highest numerical value and then alphabetically from A to Z.

The sort function changes look. So if you decide you want to sort from Z to A, click the ▲

Action ◇	Req ID ◇	Req Name ▲	Req Date ◇	Total Amount ◇	Status ◇	Purchase Order ◇	Receipt(s) ◇	Invoice(s) ◇	Total Payments (inc GST) ◇
⊙	0000025454	0000025454	17/08/2016	157.88	Complete	0000311907	0000385860	01-323090	166.6

eForm Example: if you sort by Invoice, the forms are sorted from the lowest to highest numerical value. The sort function changes look. So if you decide you want to sort from highest to lowest, click the ▲

| eForm ID ◇	Form Type ◇	Form Status ◇	Requestor Name ◇	Original Date ◇	Invoice ▲	Dept ◇	Invoice Date ◇	Due Date ◇	Customer Name / Account Holder ◇	Invoice Amount ◇	Item Balance ◇
118	WRITE_OFF	Pending	Pelle,Morena	28/05/2017	CART045072	806	20/03/2017	01/04/2017	Easton,Laura Somerville	110.000	110

Filter Temporarily

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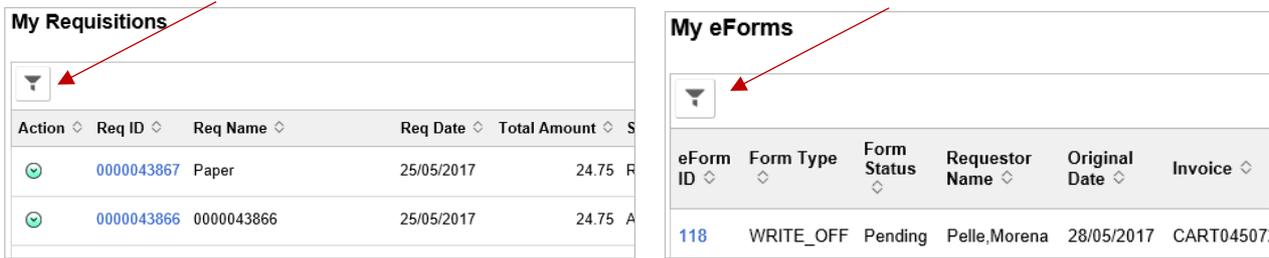
2. A **Refine Filter Criteria** window will appear. In the field you want to filter your requisitions by click the **v** arrow for the drop-down menu. You can filter more than 1 criteria. These fields are case sensitive.

Requisition examples:

- If you know the requisition was named 'software for snagit', you could search by the **Requisition Name** field. Select **contains** from the drop-down menu and type in **snagit**. Click **Done**
- If you created a requisition last week, you could search by Requisition Date. Select 'between' from the drop down menu. An additional field will appear. Select the dates for the start and end of last week
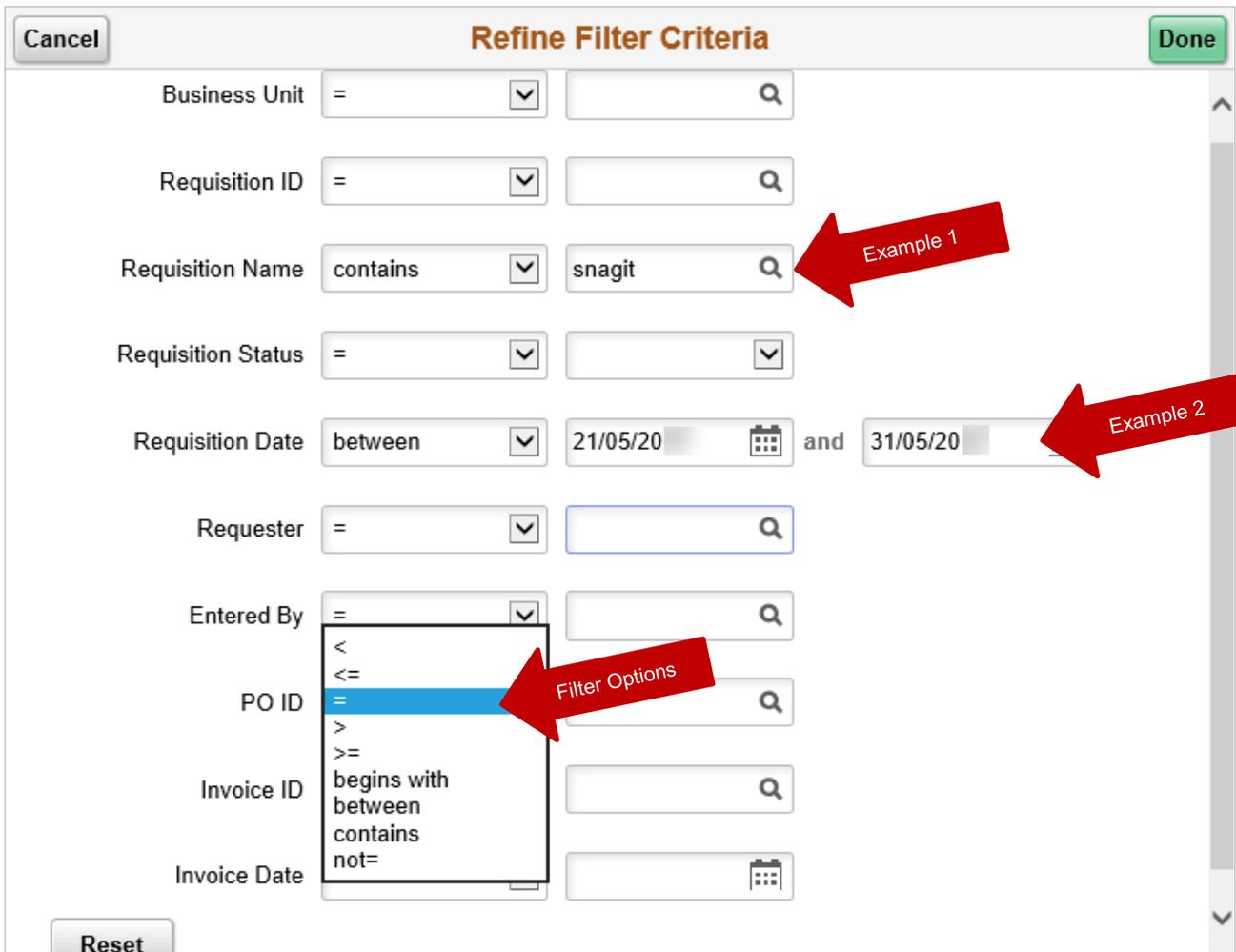
eForm examples:

- If you want to search for eForms that have the status of Pending, you could search by Workflow Form Status. Select **=** from the drop-down menu in addition to **P-Pending** from the next field. Click **Done**

- If you created an eForm last week, you could search by **Original Date**. Select **between** from the drop down menu. An additional field will appear. Select the dates for the start and end of last week. Click **Done**

3. Click **Done**. Your requisitions or eforms will be filtered according to your filter requirements

Note: If you receive the following message, click on the filter icon and modify your search
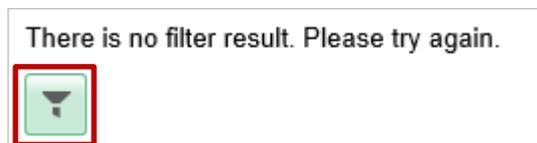
Contact Us

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