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.

   ![Requisition Example](image)
   
   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.

   ![Requisition Example](image)

   **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 Example](image)
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

There is no filter result. Please try again.

Contact Us

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