

Sorting and Filtering

System components with lists allow you to sort and filter the list to make it easier to find specific rows. You can create advanced sorts and filters that search on multiple criteria. You can save these settings and reuse them any time you visit the component. In addition, your system administrator might have created agency filters that you share with other users.

If filters have been saved for a component, the system displays a drop-down list to the right of the Quick Find search box. The list contains all of the agency and user-saved filters and sorts for this component and an **Advanced** link. If no filters exist for the component, an **Advanced** link is displayed instead.

To use a saved filter or sort on the component list, click the down arrow and choose the filter or sort you want to use.

Using the Quick Find Search Box

A Quick Find search box is standard on each component that contains a list. It searches all rows in the list for a string of text and then displays only rows with fields containing that string. Follow these steps to use the Quick Find search box:

1. Click in the Quick Find search box for a list that you want to filter.



2. Type the string of characters you want to match or use as a delimiter. The Quick Find filter is not case-sensitive.

After you type at least three characters and wait a moment, the system refreshes the list and displays the rows that contain the string of characters you entered. This creates a temporary filter.



Example shown will return all Contracts beginning with 140.

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3. If you want to remove a row from the list of search results, select **Exclude from Search Results** on the **Actions** menu for that row.

The row is removed from the list of search results. You can exclude additional rows as needed.

On this page: [Contract-Global Progress Overview](#) [Contract Vendor Assets](#) [Daily Work Report Overview](#)

PROJECT CONSTRUCTION INSPECTOR ROLE

Contract-Global Progress Overview

140 System Default Showing 50 of 231 0 changed

Contract	Description	Prime ID	Prime Name	Actions
140001	GRADING, BITUMINOUS SURFACING, LIGHTING, ROUNDA	0000192910	LANDWEHR CONSTRUCTION INC	
140002	GRADING, BITUMINOUS SURFACING, RWIS, AND BRIDGE	0000192907	NORTHSTAR MATERIALS INC dba/ KNIFE RIVER MATERIAL	Open
140004	BICYCLE TRAIL SIGNING.	0000272305	SAFETY SIGNS INC	Exclude from Search Results
140005	ELECTRIC LIGHTING AND BRIDGES 69101, 69102 AND 691	0000318690	PCI ROADS LLC	Open
140006	GRADING, BITUMINOUS SURFACING, APPROACHES, AND	0000203175	MINNOWA CONSTRUCTION I	Tasks
140007	GRADING, BITUMINOUS SURFACE, AND BRIDGE #35003 &	0000197854	ROBERT R SCHROEDER CO	Add EOM Trucking
140008	LANDSCAPING	0000215370	SNORTUMS NURSERIES INC	Add Subcontracts
140009	GRADING, BITUMINOUS MILL, BONDED CONCRETE OVER	0000193884	CS MCCROSSAN CONSTRU	Views
140010	GRADING, BITUMINOUS MILL, OVERLAY, & SURFACING, #	0000207897	CENTRAL SPECIALTIES INC	Approved DBE Commitments
140011	GRADING AND BITUMINOUS SURFACING	0000192910	LANDWEHR CONSTRUCTION	Attachments
140012	LANDSCAPING	0000210424	HOFFMAN & MCNAMARA CO	Attachments
140013	GRADING, BITUMINOUS SURFACING, REVISE SIGNAL SYE	0000197854	ROBERT R SCHROEDER CO	Contract Administration

4. You can adjust the filter by replacing the text in the search box, or you can clear the filter by clicking the eraser icon on the right side of the search box.



Using Advanced Filters and Sorts

Every system component that contains a Quick Find search box provides an **Advanced** filter link that allows you to create and save custom sorts and filters that search on multiple criteria. The advanced filter on grid lists also allows you to change the order in which columns are listed.

You can save sorts and filters permanently for reuse any time you visit the component. Sorts and filters are associated only with the component on which they are built.

When you click the **Advanced** link most components, the system displays the Advanced Filter overlay with three sections titled *Filters*, *Sort*, and *Apply Settings*. On grid lists, the Advanced Filter overlay also contains a fourth section for setting *Column Order*.

Filters

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The screenshot shows a software interface with a navigation bar at the top containing 'Home', 'Recent', and 'My Pages' dropdowns, and 'Actions', 'Help', and 'Log off' buttons. Below the navigation bar, there are breadcrumb links: 'On this page: Contract-Global Progress Overview > Contract Vendor Assets > Daily Work Report Overview'. The main heading is 'PROJECT CONSTRUCTION INSPECTOR ROLE'. A blue bar contains a dropdown menu for 'Contract-Global Progress Overview'. Below this is a search bar with the text 'Type search criteria or press Enter' and a 'System Default' dropdown menu. A red circle highlights the 'System Default' dropdown. Below the search bar, there are two more blue bars: one for 'Contract Vendor Assets' and one for 'Daily Work Report Overview'. A 'Save' button is visible on the right of the 'Daily Work Report Overview' bar. Below the search bar, there is a text input field with 'System Default' and a dropdown arrow. A list of options is shown below the input field: 'parallel test', '130197', 'System Default', and 'Advanced'. The 'Advanced' option is highlighted with a red circle.

Follow these steps to create a filter:

1. Click the down arrow in the field below the Filters header to display a list of all the columns in the component (including hidden columns). Select the column you want to filter.

The system displays a list of operators appropriate for the chosen column and a field for entering the value you want to match (depending on the column you are filtering, this may be a text box, a check box, or a tool for selecting a date).

2. Click the down arrow and select the operator you want to use to narrow your filter.

Depending on the column, operators can include:

Contains	Is Blank
Does Not Contain	Is Not Blank
Begins with	Is On
Is Equal To (=)	Is Not On
Is Not Equal To	Is Earlier Than
Greater Than (>)	Is Earlier Than or On
Less Than (<)	Is Later Than
Greater Than or Equal To (>=)	Is Later Than or On
Less Than or Equal To (<=)	Is Later Than
	Within Past ___ Days

3. Enter the value you are trying to match or want to use as a delimiter (if a text box, the filter is not case-sensitive).

4. You can create multiple clauses in your filter. To add a second clause, select **And** or **Or** to join the first clause with the second. Then enter column, operator, and value as in

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steps 1-3. When multiple filter clauses are joined using the **And** or **Or** operators, the system follows the standard order of operations where **And** has precedence over **Or**.

To remove a clause from the filter, click the **X** to the right of the clause.

Sort

Follow these steps to create a sort:

1. Click the drop-down list to select a field on which to sort.
2. The list will sort on the field in ascending order by default; if you want to sort in a descending order, select the **Sort descending** check box for that criterion.
3. You can add more than one sorting criterion by selecting a second field. For example, you can have the Contract Progress Overview component sorted first by **Contract ID**, then by **Prime Contractor Vendor ID**.

To remove a criterion from the sort, click the **X** to the right of the criterion.

Apply Settings

If you do not want to save your settings and only want to apply them right now, click the **Apply without saving** link. The system returns you to the list and immediately sorts or filters the selected component.

If you want to save your settings, follow these steps:

1. In the **Save as** text box, type the name by which you want to save the filter or sort. The name must be different from any other filter or sort saved by you for this component.
2. If you want the filter or sort to be used as the default for this component, select the check box labeled **Make this the default setting**.
3. Click the **Save and Apply** button.

In instance shown below, the filter is now named the SP number.

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Editing System Default Delete this setting

Filters

Contract ID Contains 140151

Or Select field to filter by

Sort

Sort descending

Select field to sort by

Apply Settings

Save as 1206-54 or Apply without saving

Make this the default setting.

Save and Apply

The results of above filter will show as below:

Contract-Global Progress Overview

Q 140151 1206-54 Searching...

1206-54
System Default
Advanced

Contract Vendor Assets

Modifying Saved Settings

You can modify the filter and sort settings that you save. You cannot modify agency filters. To modify settings, open the **Advanced Filter** overlay and select the filter or sort you want to modify. Change information in columns, operators, and values as needed.

Deleting Saved Settings

To delete saved filter and sort settings, open the Advanced Filter overlay and select the filter or sort you want to delete in the **Editing** field. Click the **Delete this setting** link.

Editing 1206-54 Delete this setting

Filters

Contract ID Contains 140151

Or Select field to filter by

Sort

Sort descending

Select field to sort by

Apply Settings

Save as 1206-54 or Apply without saving

Make this the default setting.

Save and Apply