



QUICK REFERENCE GUIDE:

Sort and Filter Using the Advanced Filter

Background:

Next to almost every search field there is the option to use the Advanced Filter. This filtered view can be used once or saved for future use. The Advanced Filter can also be used to change the way the information is sorting. If desired you can use both the filter and the sort function.

Roles:

All Roles

Navigation:

To create an advanced filter:

1. Navigate to a screen with a Quick Search field
2. Click the **Advanced** link in the field next to the search box

Enter search criteria above to see results or [Advanced](#)

3. Under **Filters** select the parameters by which you want the information to filter (there is the option to sort by **Visible Columns** that you will see displayed on the screen you are filtering as well as **Hidden Columns**, which are not displayed, but are still possible to use for filtering)
4. Choose a clause from the dropdown you want to use to filter (Contains, Less Than, Greater Than, Is Blank, etc.)
5. Enter text, numbers or both into the following field or choose from the available dropdown

6. If you want to add additional clauses use **Or** or **And**, repeating steps 3-4.
7. If you want to use this filter once, click the **Apply without saving** button to the right of the Save as row.
8. If you want to use this filter in the future, enter a name for your filter in the field after **Save as** and click the **Save and Apply** button at the bottom of the filter window

To create an advanced sort:

1. Navigate to a screen with a Quick Search field
2. Click the Arrow in the field next to the search box and click **Advanced**
3. Under **Sort** select the parameters by which you want the information to filter (there is the option to sort by **Visible Columns** that you will see displayed on the screen you are sorting as well as **Hidden Columns**, which are not displayed, but are still possible to use for sorting)
4. Click the **Sort descending** box to sort Z-A or greatest-least.
5. Continue to add as many additional ways of sorting the displayed information as you want
6. If you want to use this Sort once, click the **Apply without saving** button to the right of the Save as row. If you want to use this Sort in the future, enter a name for your sort in the field after Save as and click the **Save and Apply** button at the bottom of the filter window

To delete a saved advanced filter or sort:

1. Select **Advanced** in the dropdown
2. Ensure the filter or sort you want to delete is populated after Editing
3. Click the **Delete this setting** button

If you need further assistance please contact your [Module Admin](#)