



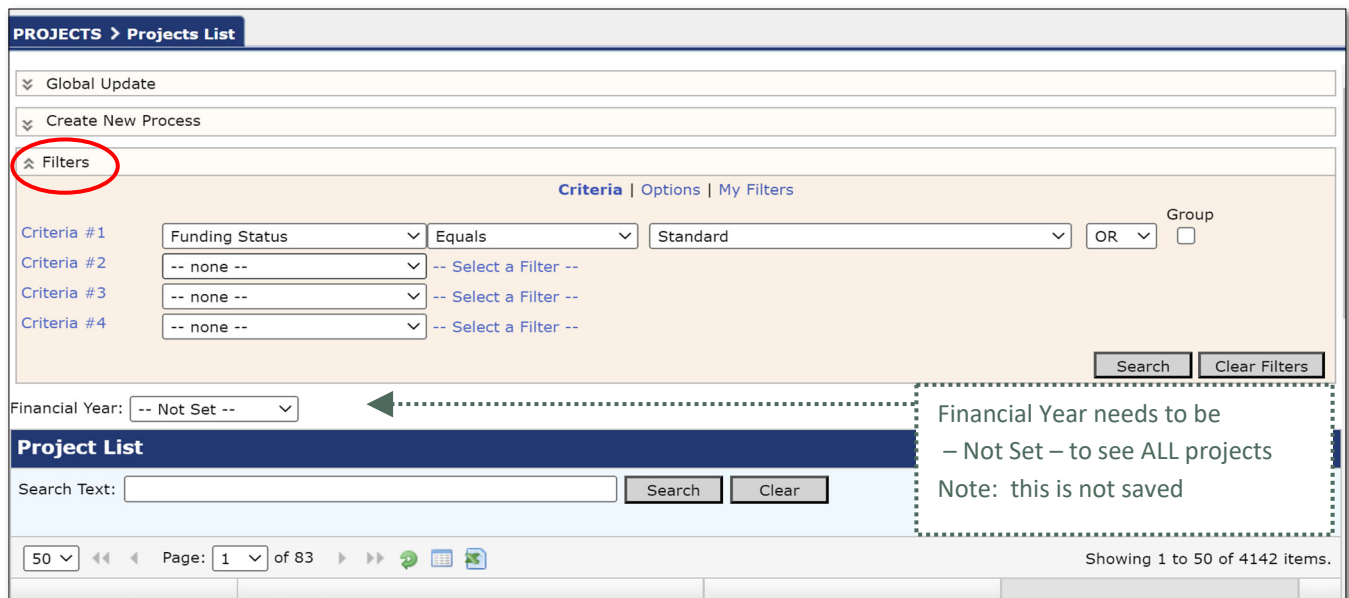
Setting up a Filter for Contract & Project Lists

Filters are very useful and can be setup on the Project List and Contracts List Screen.

To create a Project filter you must be in the Projects List and for a Contract filter you must be in the Contracts List.

In the Side Menu – select **Projects > Projects List** and click on the Filters arrows

This double upwards arrow  toggles the filter window on & off

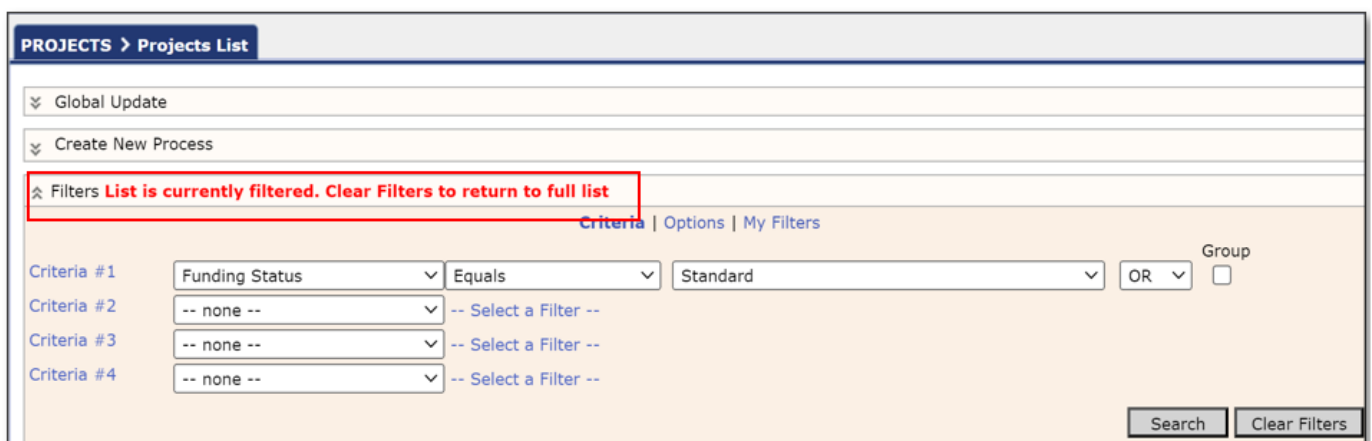


The screenshot shows the 'PROJECTS > Projects List' interface. The 'Filters' menu item is circled in red. Below the filters, a callout box points to the 'Financial Year' dropdown, stating: 'Financial Year needs to be - Not Set - to see ALL projects. Note: this is not saved'.

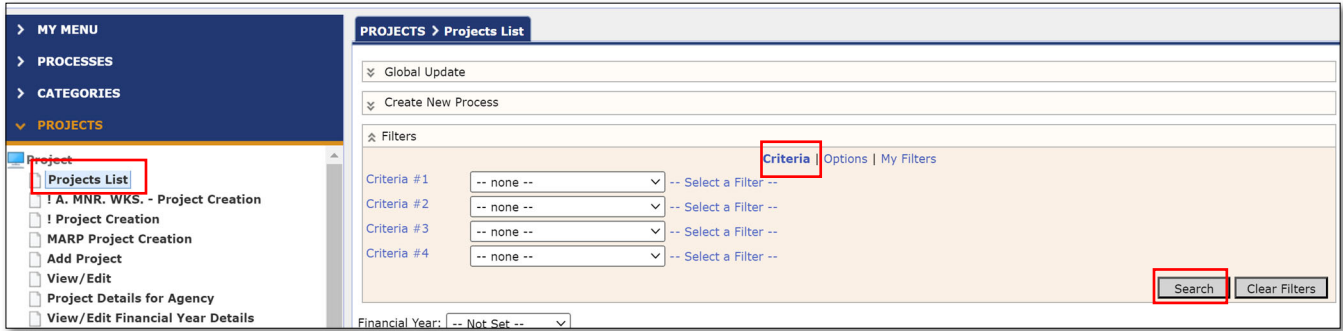
NOTE: The **Project list** screen will be set as a default with this filter until you select the **Clear Filters** button. This will be the case even if you log out and back in again.

If you cannot find a Project or Contract at some stage, remember to clear your filters.

When a filter is active you will see the following note in red stating the fact.



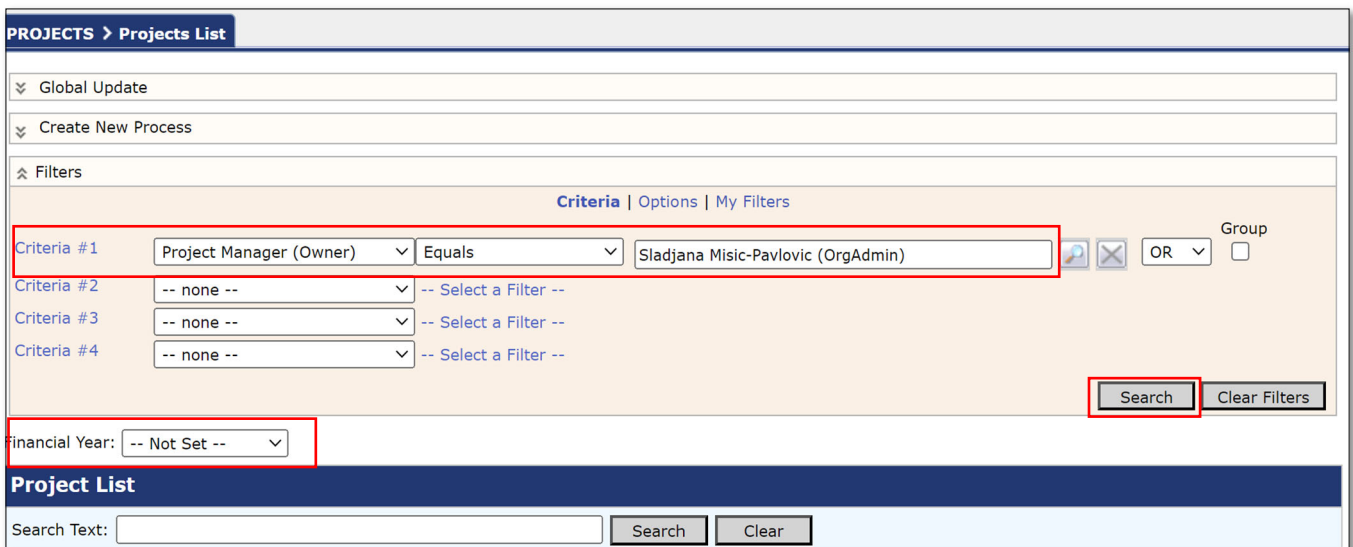
The screenshot shows the 'PROJECTS > Projects List' interface with a red warning message: 'Filters List is currently filtered. Clear Filters to return to full list'.



On the **Criteria** tab, set the criteria #1 as **Project Manager (Security Access), Equals** then **Find Your Name** – search & select.

Click on the **Search** button to find the relevant Projects.

NOTE: Make sure the **Financial Year** field is **Not Set**.



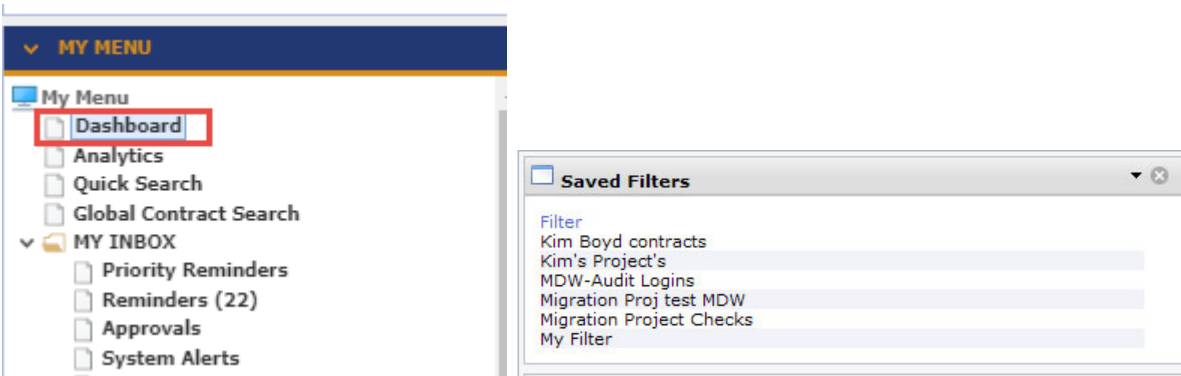
To **SAVE** this filter for future use:

Click on the **My Filters** tab.

In the **Filter Name** field, enter in a relevant name. **Eg:** My Projects, My Contracts etc.

This will appear in the **Saved Filters Widget** on the **Dashboard** screen.

You may save a filter for another PM if you are covering for them whilst they are on leave.



PROJECTS > Projects List

Global Update

Create New Process

Filters

Criteria | Options | **My Filters**

Select Filter:

To save the current filter criteria simply enter the name you wish to call your filter set in the text box below, and click on the save button.

Filter Name: Save for all users

Financial Year:

Project List

To access a saved filter from this screen you can use the load button. On the **My Filters** tab, on the **Select Filter** field, use the **dropdown down arrow** to see what filters are available. Select the one you want, click **LOAD**, then click **SEARCH**.

PROJECTS > Projects List

Global Update

Create New Process

Filters

Criteria | Options | **My Filters**

Select Filter:

To save the current filter criteria simply enter the name you wish to call your filter set in the text box below, and click on the save button.

Filter Name: Save for all users

Financial Year:

You can now view your projects.
Select/Highlight a Project to see further details.

PROJECTS > Projects List

Global Update

Create New Process

Filters **List is currently filtered. Clear Filters to return to full list**

Criteria | Options | My Filters

Criteria #1 Group

Criteria #2

Criteria #3

Criteria #4

Financial Year:

Project List

Search Text:

50 Page: 1 of 83 Showing 1 to 50 of 4142 items.

Project Number	Project Title	Status	Project Manager (Owner)
15386	DPIRD (QWA) - Lease Incentive (Billable Project 15385)	Proposed	
15402	collie Ski resort school	Proposed	
14880	Spring Hill Primary School - Early Childhood - New 3 room ECE Building - WA Recovery	Active	Adam Dabrowski
14882	Yale Primary School - New Early Childhood Buildings - New 3 room PP/K building - WA Recovery	Active	Adam Dabrowski
14918	Leeming Senior High School - Refurbishments - WA Recovery	Active	Adam Dabrowski