Advance Filters and Sort

AASHTOWare Project Civil Rights & Labor™ Quick Reference Guide

Additional Quick Reference Guides and Computer Based Training files are available from the ODOT AASHTOWare webpage.

Key to Action Buttons

Actions — Global Actions menu (top of the screen)

Component Actions menu (on headings)

Row Actions menu (on rows)

Roles:

All agency roles will have access to their corresponding reports.

Background:

- o Advanced filters allow you to create and save custom sorts and filters that search multiple criteria.
- o The advanced filter on worksheets also allows you to change the order in which columns are listed.
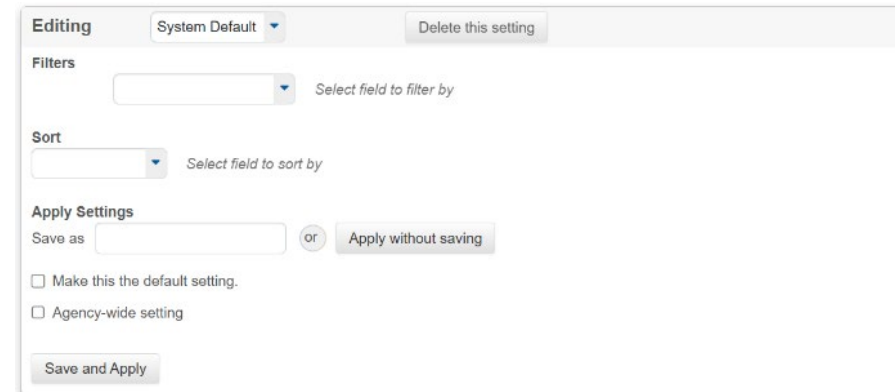
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Advanced Filter Option

When you select the **Advanced Filter** option on most components, the system displays the Advanced Filter overlay with three sections titled: Filters, Sort, and Apply Settings.

Follow these steps to create an advanced filter.

1. Click the down arrow in the field below the Filters header and select the field you want to use for the filter.

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

Depending on the field selected, operators can include:

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

- o Is Later Than or On
- o Within Past ___ Days

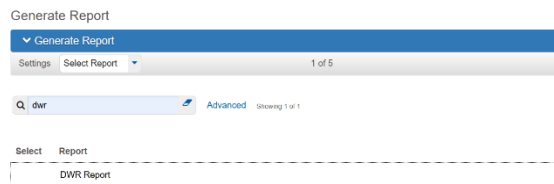3. Enter the value you are trying to match or want to use as a filter.

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 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**.

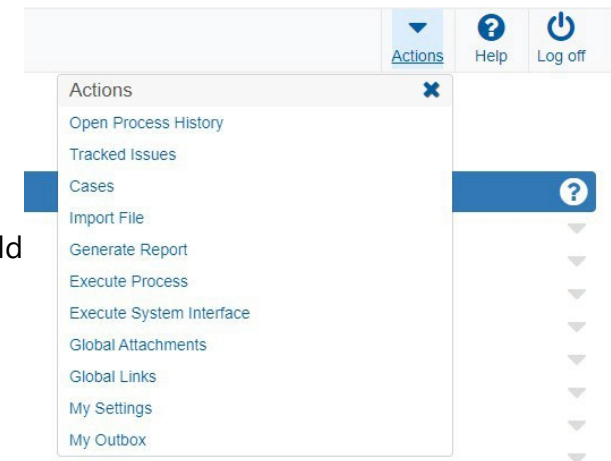4. To remove a clause from the filter, click **Delete** to the right of the clause.

Frequently Used Filters:

Advanced Filter to View DWR Status

1. Click the **Global Actions Menu** in the upper right corner of the screen and select **Generate Report**.

2. Using the search field, enter the report you want to run or simply press enter in the search field to see all the available reports.

3. Select the DWR report.

4. In the search field, enter the contract number you want to look at. Press Enter to display available information.

5. If you are reviewing DWRs but want to only look at a certain status (e.g., Draft, Pending Approval, Approved), you can set up an Advanced filter to assist you.

6. Select the data you want to run the report on. Under the contract name, use the drop-down menu to select Advanced.

7. Now select DWR Status, Contains, Pending Approval or other statuses you want to search. To keep the filter for future use, add a name under Apply Settings. (This example used Pending Approval.) Then select Save and Apply. To apply without saving, select Apply without saving.

8. Here is an example of what the filter will look like once applied.

9. Now select the DWRs you want to have on your report for review and press **Execute.**

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 select 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.
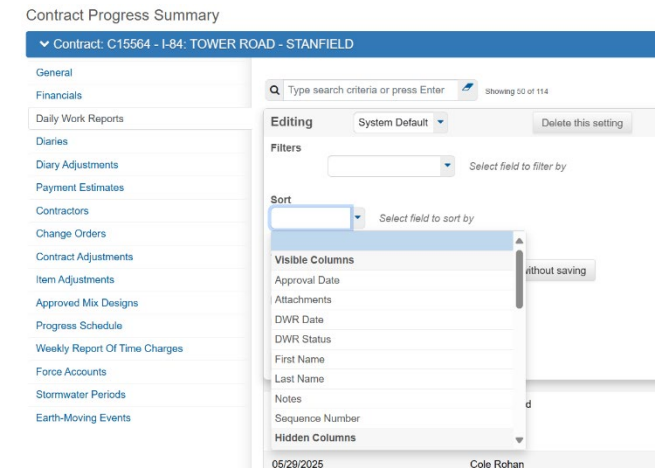
6. If you want to use this Sort once, click the Apply Without Saving button to the right of the Save As row. If you want to use this Sort in the future, enter a name for your sort in the field after **Save As** and click the **Save and Apply** button at the bottom of the filter window.

Delete an Advanced Filter and 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.