

**Quick Start Guide: Action List Filter**

**Summary:** The KFS Action List has a filter feature to select Action List items you may wish to view. This is useful if you have a large Action List and need to find a particular document, or view a specific type of document. The ‘exclude’ feature filters out document types you don’t need to view.

|  |  |  |
| --- | --- | --- |
| Steps | **What you need to do** | **How to do it** |
| 1 | Access KFS via ZOTPortal | 1. Use your UCInetID and password to log in to <https://portal.uci.edu/> 2. Press the **Faculty and Staff** tab and then select the **KFS** tab |
| 2 | Access Action List | 1. From the **KFS Tools** portlet, select **Action List** |
| 3 | Open the Action List filter to select a document type | 1. Select the **filter** button to open the Action List Filter      1. In **Document Type**, select the  , the magnifying glass icon, to find a document |
| 4 | Search for Document Type to select in filter | 1. Enter the Document abbreviated name in the **Name** field    1. For example, enter **PCDO** for Procurement Card Transaction Document (PALCard) 2. Press the **search** button |
| 5 | Filter the Document Type | 1. Select **return value** next to the Document Type you wish to filter |
| 6 | Complete the filter setup in the action list | 1. If you want to view only the document type selected, skip Step 6.2 2. If you want to see all documents*,* **except** the one selected, check the **Exclude** indicator checkbox    1. Selecting the **Exclude** checkbox will exclude all documents of this type from view in the Action List.    2. Not selecting the checkbox will show only that document type in the Action List 3. Select the **filter** button to be taken back to the Action List |
| Optional | C:\Users\mplee\AppData\Local\Temp\SNAGHTML3778cf5.PNGRemove filters from Action List | 1. From the Action List, select the **clear filter** button to remove all filters and view all documents in your Action List |