

Search Filters

Purpose:

Filters are a powerful feature in RMS that allow you to quickly find records. The filtered search feature also lets you apply search criteria for frequently used queries. You can apply a single filter to a search, or use multiple filters to further refine your search.

As with other functionality in RMS, role permissions determine what you can search for in RMS.

Below are a few filtered search examples by role. Any one of the filters could be combined with each other.

Researcher/Team Member/Designate

- Pre-award>RMS#>contains>xyz (e.g., last three numbers)
- Team Members>last name>contains><name>
- Pre-award>Type of Application>Equals>xyz type (e.g., Grant Full Application)
- Pre-award>Created on>equals>date
- Pre-award>Updated on>equals>date
- Pre-award>Status>equals>xyz status (e.g., In Preparation, Submitted for Approval, For Intake by Research Services)
- Pre-award>Status>does not equal>xyz status (e.g., In Preparation, Submitted for Approval, For Intake by Research Services)
- Approvals>Status>equals>type (e.g., Submitted for Approval, For Intake by Research Services, etc.)

Grants Assistant/Grants Officer

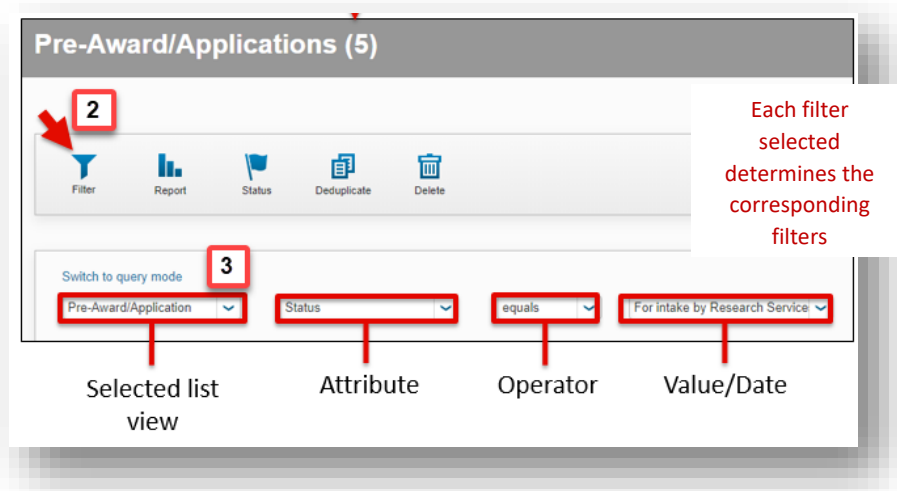
- Funding Opportunities>program deadline>equals>date
- Funding Opportunity>status>equals>type
- Funding Agency>type of agency>equals>type
- Funding Agency> acronym>contains>(e.g. NSERC, SSHRC)
- Agency>status>equals>(type)
- Agency>record source> equals>(RMS/PeopleSoft)
- Agency>PeopleSoft Agency ID>is not empty or is empty
- Principal Investigator>last name or first name>contains>(enter name)

Audience:

All roles.


CONDUCT SINGLE FILTER SEARCH

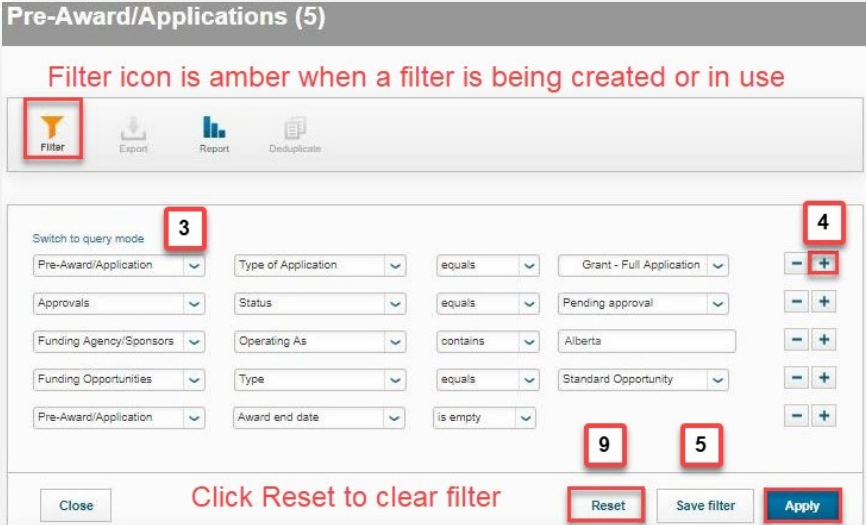
1. Select from the left pane menu options **Award Management>Pre-Award/Applications**.
2. Click the **Filter** icon in the right pane. **Switch to query mode** section displays.
3. Select the search parameters (e.g., list view, attribute, operator, and value/date).



4. Click **Apply**. The list displays based on the search parameters.

CONDUCT AND SAVE A MULTI-FILTERED SEARCH

1. Select from the left pane menu options **Award Management>Pre-Award/Applications**.
2. Click the **Filter** icon in the right pane. *See Figure 65: Search Parameters in the previous section.* Switch to query mode section displays.
3. Select the search parameters (e.g., list view, attribute, operator, and value/date) for the first filter.
4. Click the **Add Filter**  icon to add each additional filter.
5. Click **Save Filter**.
6. Enter a name into the **Filter Name** field.



Pre-Award/Applications (5)

Filter icon is amber when a filter is being created or in use

Filter Export Report DeDuplicate

Switch to query mode **3**

Pre-Award/Application	Type of Application	equals	Grant - Full Application	4
Approvals	Status	equals	Pending approval	
Funding Agency/Sponsors	Operating As	contains	Alberta	
Funding Opportunities	Type	equals	Standard Opportunity	
Pre-Award/Application	Award end date	is empty		

9 **5**

Close Click Reset to clear filter Reset Save filter Apply

7. Click **Save Filter**. The list displays based on the filters. The filter icon changes from blue to amber to indicate the list is filtered.

 **NOTE:** The list remains filtered until you click the **Reset** button.



LOAD A SAVED FILTER

Once a filter is saved, it can be quickly reloaded for future searches.

1. Click the **Restore Filter**.
2. Select the filter you want to use from the **Filter name** dropdown list.
3. Click **Load Filter**.

