

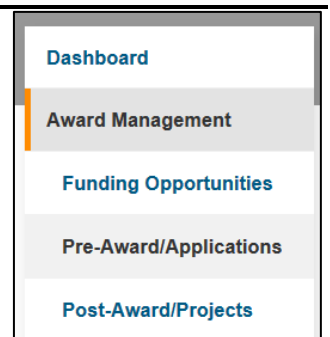
**Purpose:** Filters are a powerful feature in RMS that allow you to quickly find records. The filtered search feature also lets you apply search criteria for frequently used queries. You can apply a single filter to a search, or use multiple filters to further refine your search. As with other functionality in RMS, role permissions determine what you can search for in RMS.

**Audience:** All roles.

**To conduct a single filter search:**

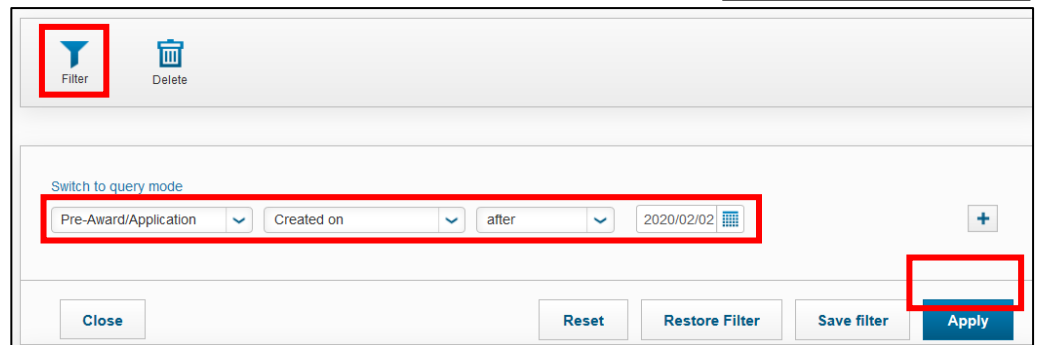
**Step 1:**

Select from the left pane menu options **Award Management>Pre-Award/Applications**.



**Step 2:**

Click the **Filter** icon.



**Step 3:**

Select the search parameters (e.g., list view, attribute, operator, and value/date).

**Step 4:**

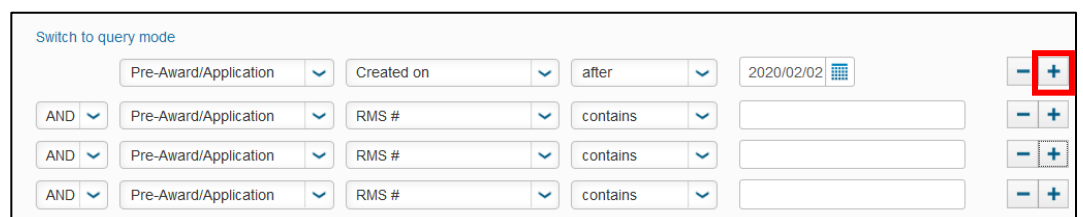
Click **Apply**. The list displays based on the search parameters. The filter icon changes from blue to amber to indicate the list is filtered.

**To conduct a multi-filter search:**

**Step 1:**

With the filter page open, select one row of search parameters, as shown above. Then click the blue plus icon to the right of the parameters.

Each row allows you to add an additional search parameter that combines with other filters.



**Step 2:**

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



**To save a filtered search:**

**Step 1:**

Add your filter parameters and then click **Save filter**.

Switch to query mode

	Pre-Award/Application	Created on	after	2020/02/02	-	+
AND	Principal Investigator/Supe	First name	contains	Joe	-	+
AND	Pre-Award/Application	Full Project Title	contains	Cancer	-	+

Buttons: Close, Reset, Restore Filter, **Save filter**, Apply

**Step 2:**

Enter a name into the **Filter Name** field.

**Step 3:**

Click **Save Filter**. 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.**

**To restore a saved search:**

**Step 1:**

With the filter page open, click **Restore Filter**.

Buttons: Reset, **Restore Filter**, Save filter, Apply

**Step 2:**

Select the filter you want to use from the **Filter name** dropdown list.

**Step 3:**

Click **Load Filter**.

Restore filter settings

Filter name

Submitted for Approvals

Buttons: Cancel, Delete filter, **Load filter**