AD16 Managing Public Search Masks (Reports)

I. Purpose:

This procedure allows RMS Administrator to create, modify, or delete a customized Search Mask (or filter) for PUBLIC use that might be frequently needed: for example, a search of active policies or a search of closed contract deliverables delivered within a certain date range.

II. Who this is for:

Only RMS Administrators can manage public Search Masks.

III. Prerequisites

The user of this procedure may also wish to review the two procedures for general users: How-to #V11, Creating a Private Search Mask, and #V12, Deleting a Private Search Mask.

IV. Definitions

In this procedure, "mask", "filter" and "reports" are used interchangeably. These refer to the search page that enables the user to select values to search.

V. Specific Details

A.   Create a Public Search Mask (this is mostly the same as How-to #V11).
1.   In Browser tab, select Concept of interest in Inbox to display a related Search Window.
2.   Enter desired filter data.
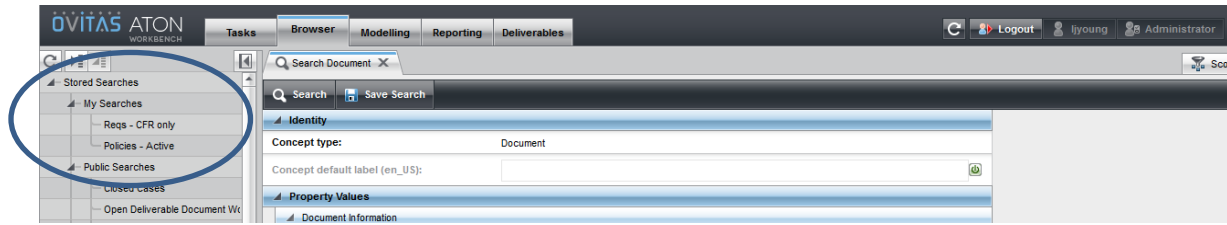3.   Then select "Save Search".
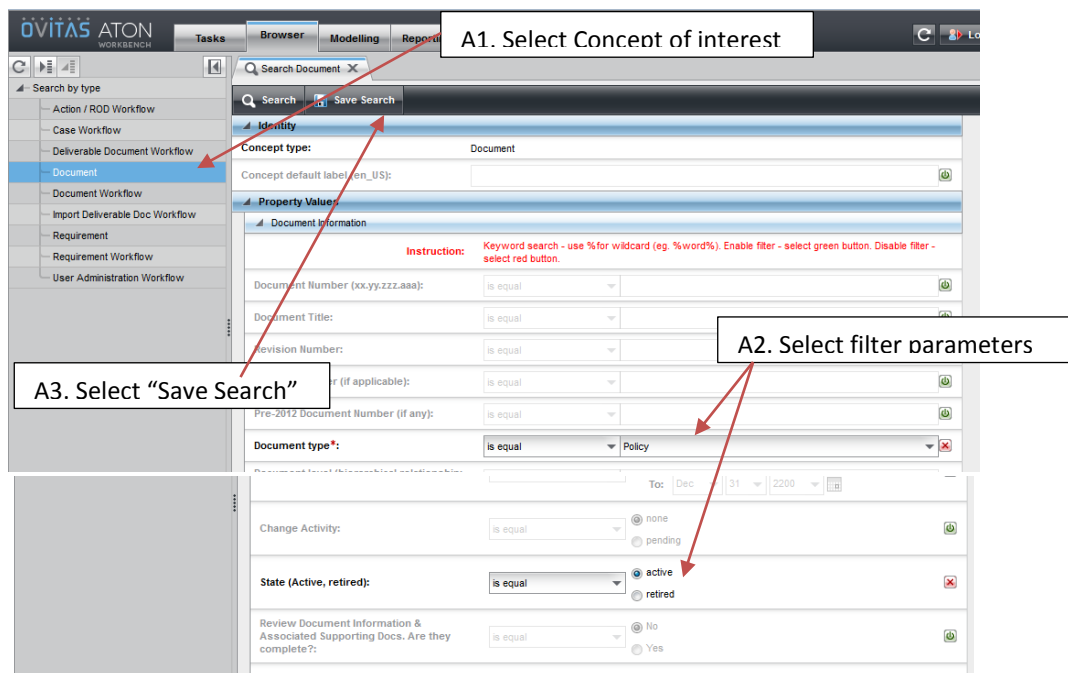
4. Result is a "Save Search" window, which has more options than shown in How-to #V11. Name the Mask (filter). This is for general users, so be sure to select a name that is helpful to users.
5. Set "Autorun"
   - "Autorun" = "yes" means that when the Mask is selected, it will automatically generate the desired List.
   - "Autorun" = "no" will result in a display of the named Search Mask with the saved field values, and then you have to hit "Search" to generate the List.
6. Set "Privacy". This is different from #V11. The Administrator can:
   - Create her own private masks (Private) OR
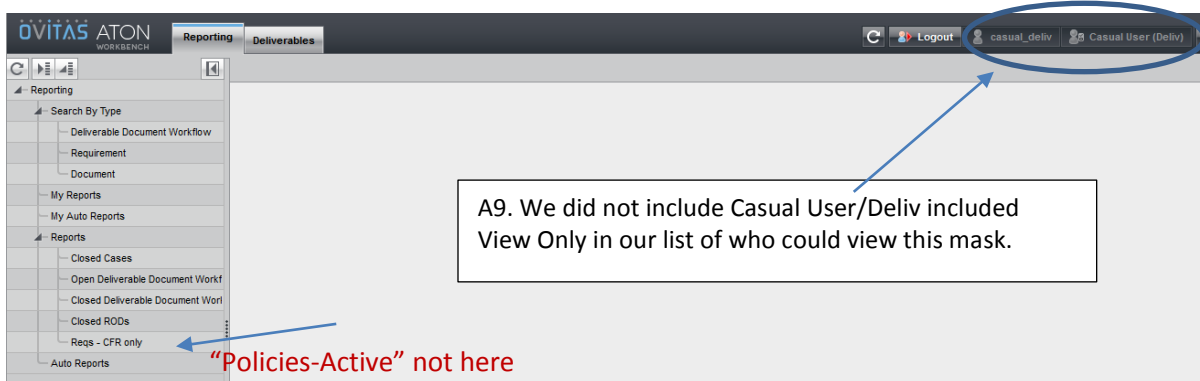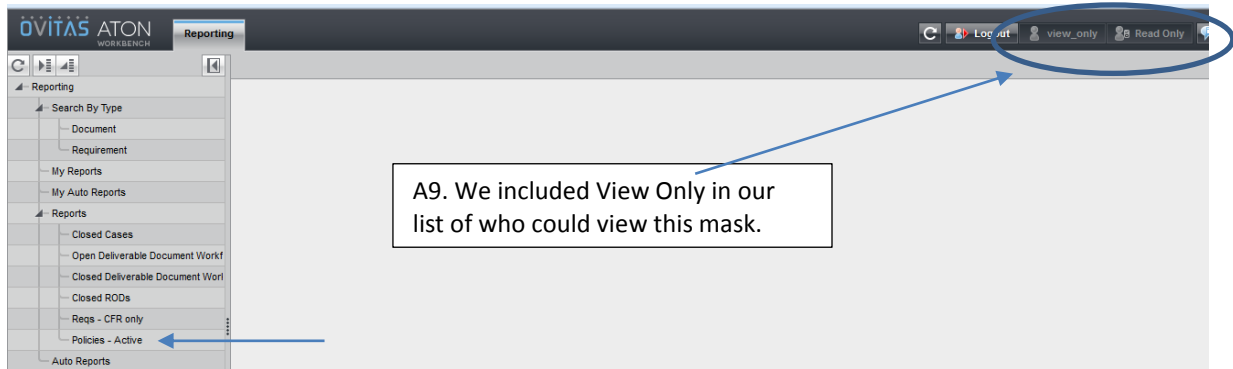   - Create masks for general use (Public)
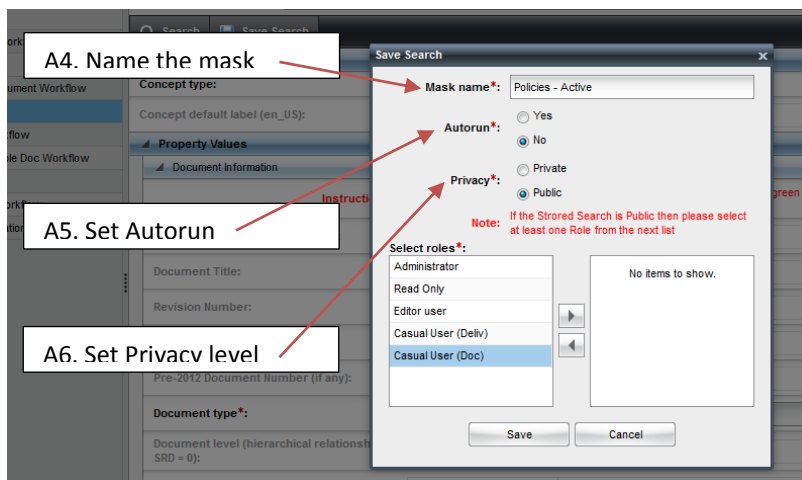
7. If Public mask, then must select the roles that will be allowed to view the mask. This is different from #V11. Select the roles by highlighting the chosen role and using the arrows to move to the right box. Then hit Save.
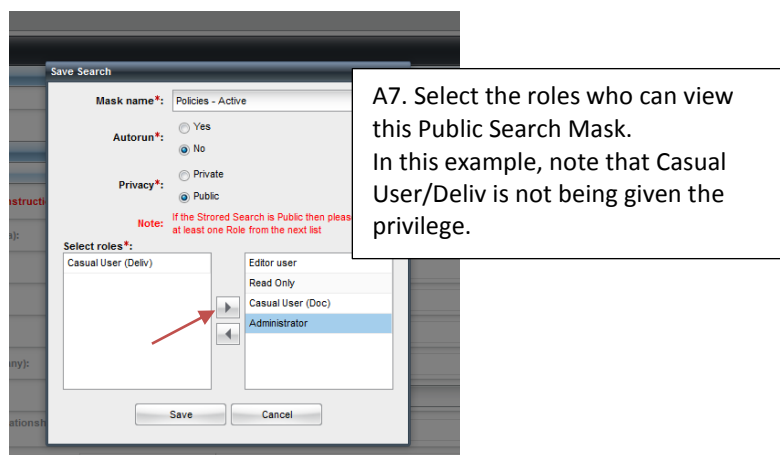
8. When "Save" is hit, then the screen returns with the new mask added to the list.


9. Verify that only the selected user roles can see the "Policies-Active" mask.

A9. We included View Only in our list of who could view this mask.

A9. We did not include Casual User/Deliv included View Only in our list of who could view this mask.

"Policies-Active" not here

B. Managing <u>Public</u> Search Masks.
1. This procedure shows how to change the Search Mask viewing properties, including deleting it.
2. In Browser or Reporting tab, <u>double click</u> "Stored Search" or "Reports" in the left pane. The "My Searches" window appears.
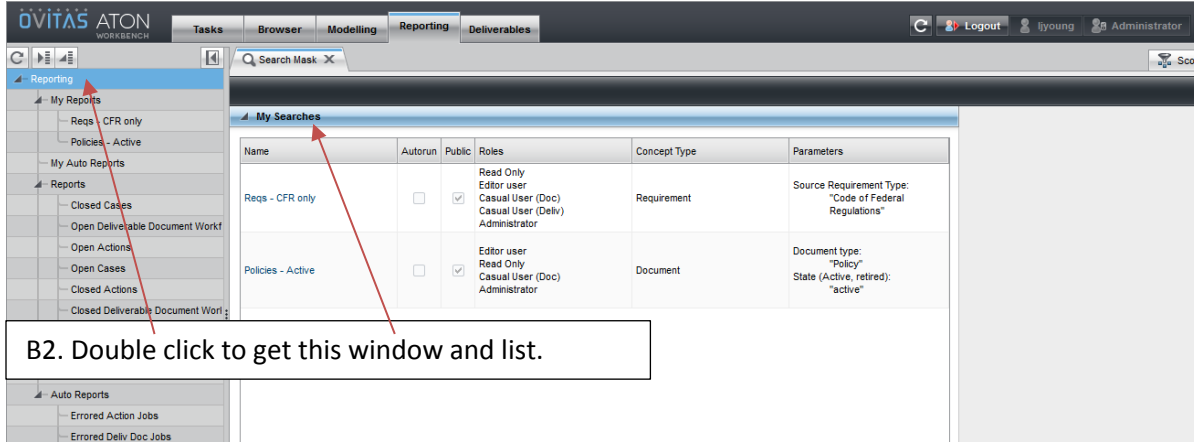
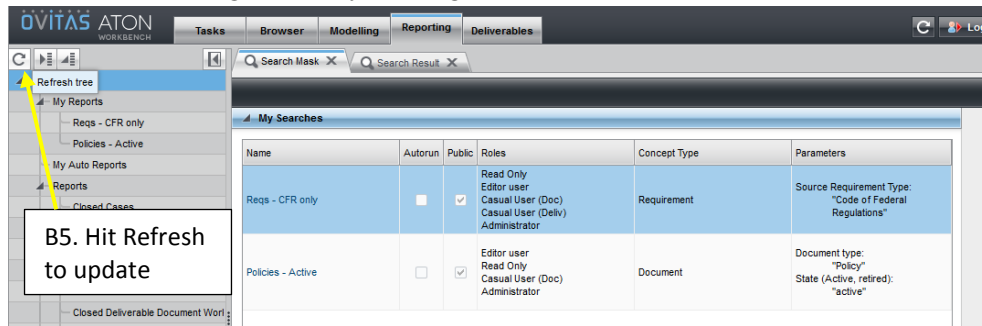B2. Double click to get this window and list.

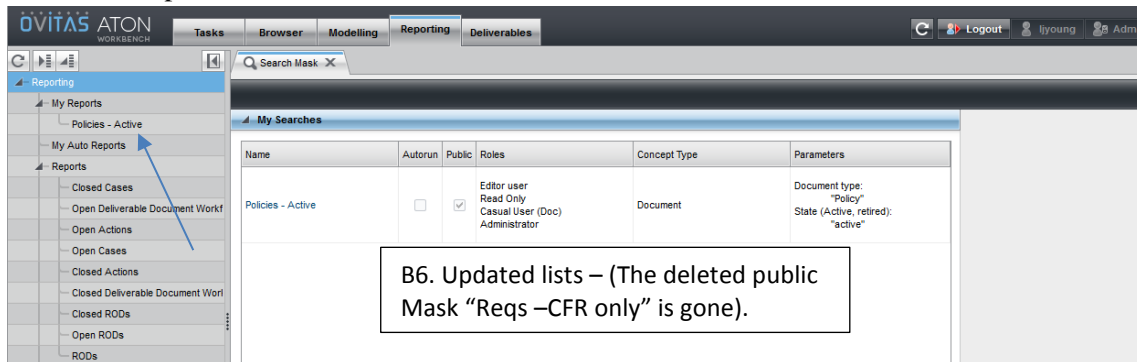3. Select the Search Mask to be edited, by clicking the name. The Edit window appears.
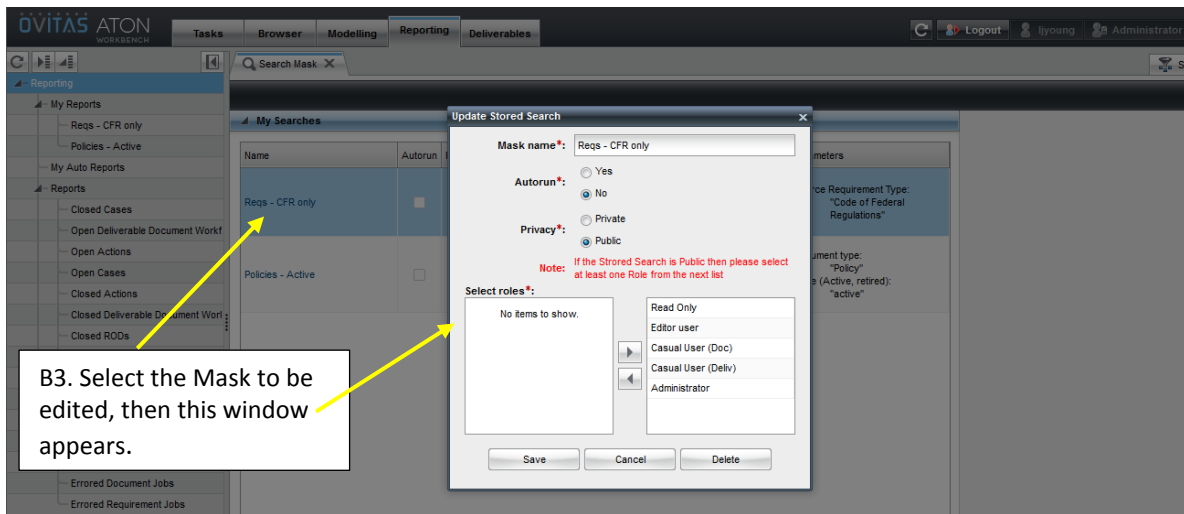
B3. Select the Mask to be edited, then this window appears.

4. Edit as desired.
- Can change to Private (Then hit "save")
- Can remove roles from the viewing/user list. (Then hit "save")
- Can let this "Autorun" (Then hit "save")
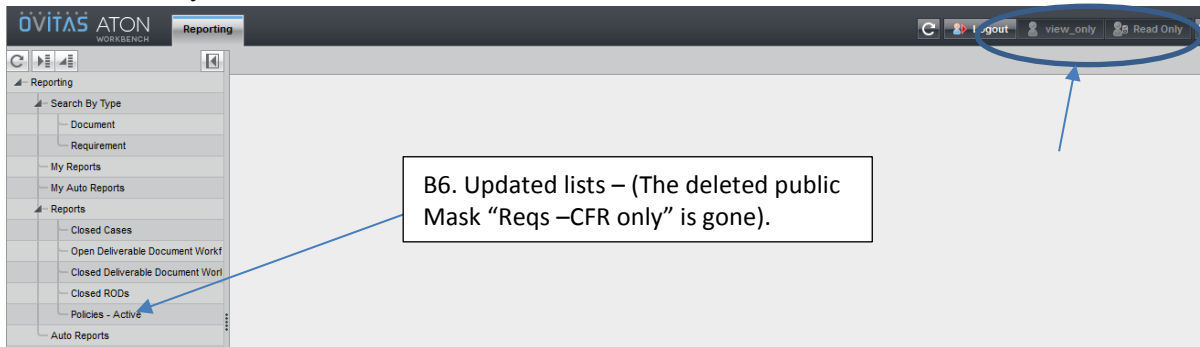- Can delete the mask (Just hit "Delete")

5. For this Example, we are going to Delete the "Reqs-CFR only" mask. The following screen results – the listings are not yet changed!!! Hit "Refresh"

B5. Hit Refresh to update

6. The updated information looks like this. Done!

B6. Updated lists – (The deleted public Mask "Reqs –CFR only" is gone).

7. Verify another user role.

B6. Updated lists – (The deleted public Mask "Reqs –CFR only" is gone).

VI. Revision History

Revision	Date	Who	Description
0	12/26/2014	L.J. Young	Initial