

## **V03 Introduction to Search: Screen Layout, Search Mask/Filter**

### **I. Purpose:**

This document explains the RMS screen layout for searching the RMS database.

### **II. Who this is for:**

General users of the RMS.

### **III. Prerequisites**

The user of this procedure should know how to log into the RMS database, and have some general knowledge of its screen layout (see How-to #V02). The user should review the Cheatsheet for General Users (#V00) and the RMS definitions to use and search the RMS (#V01).

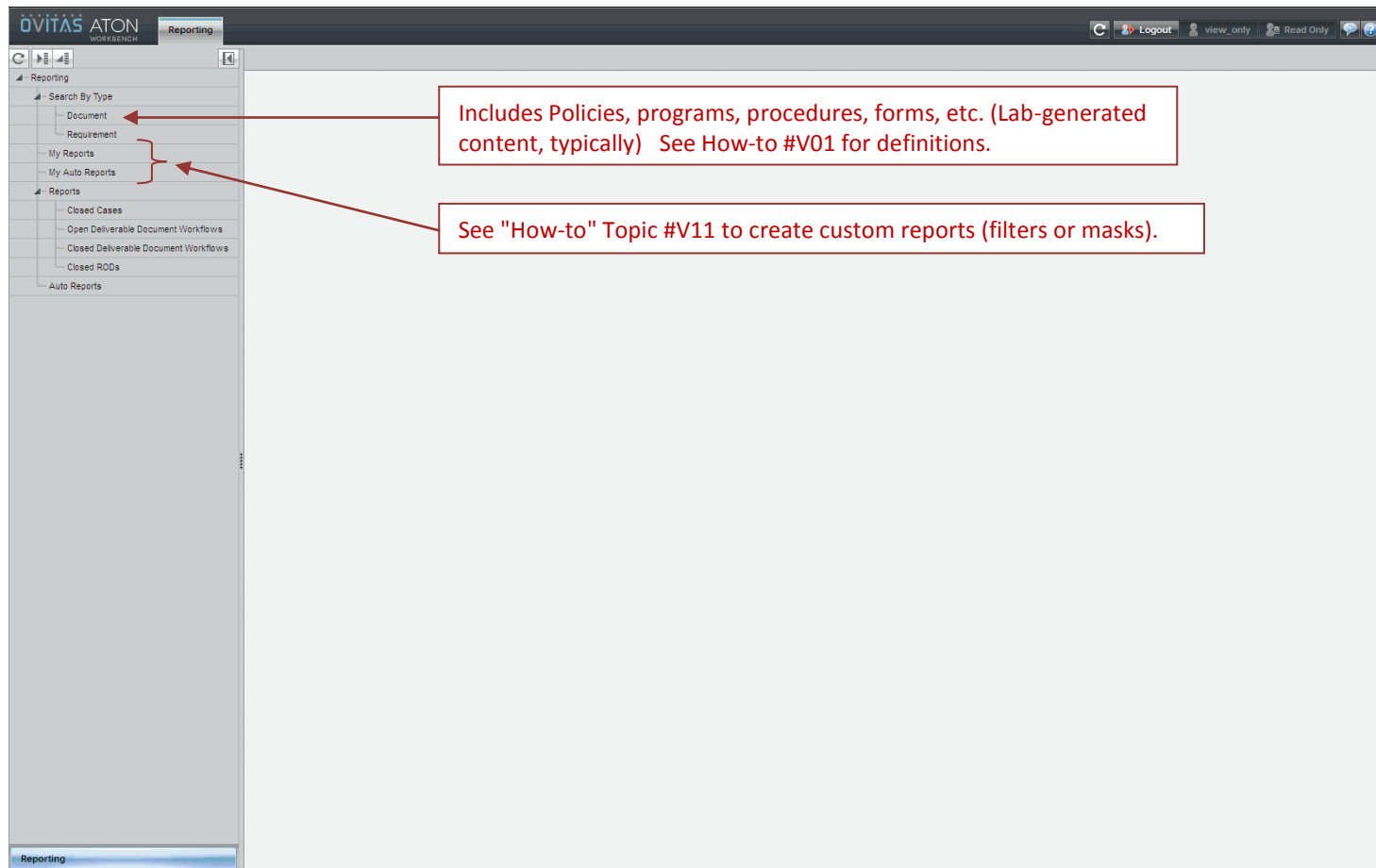
### **IV. Definitions**

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**

(following pages)

After LDAP Log-in, Read-Only Users will see this screen with the Inbox Panel populated as shown. Select (click) the Concept of interest.



[Example] Select "Document" in the Inbox (1) to obtain the Search Mask shown (2).

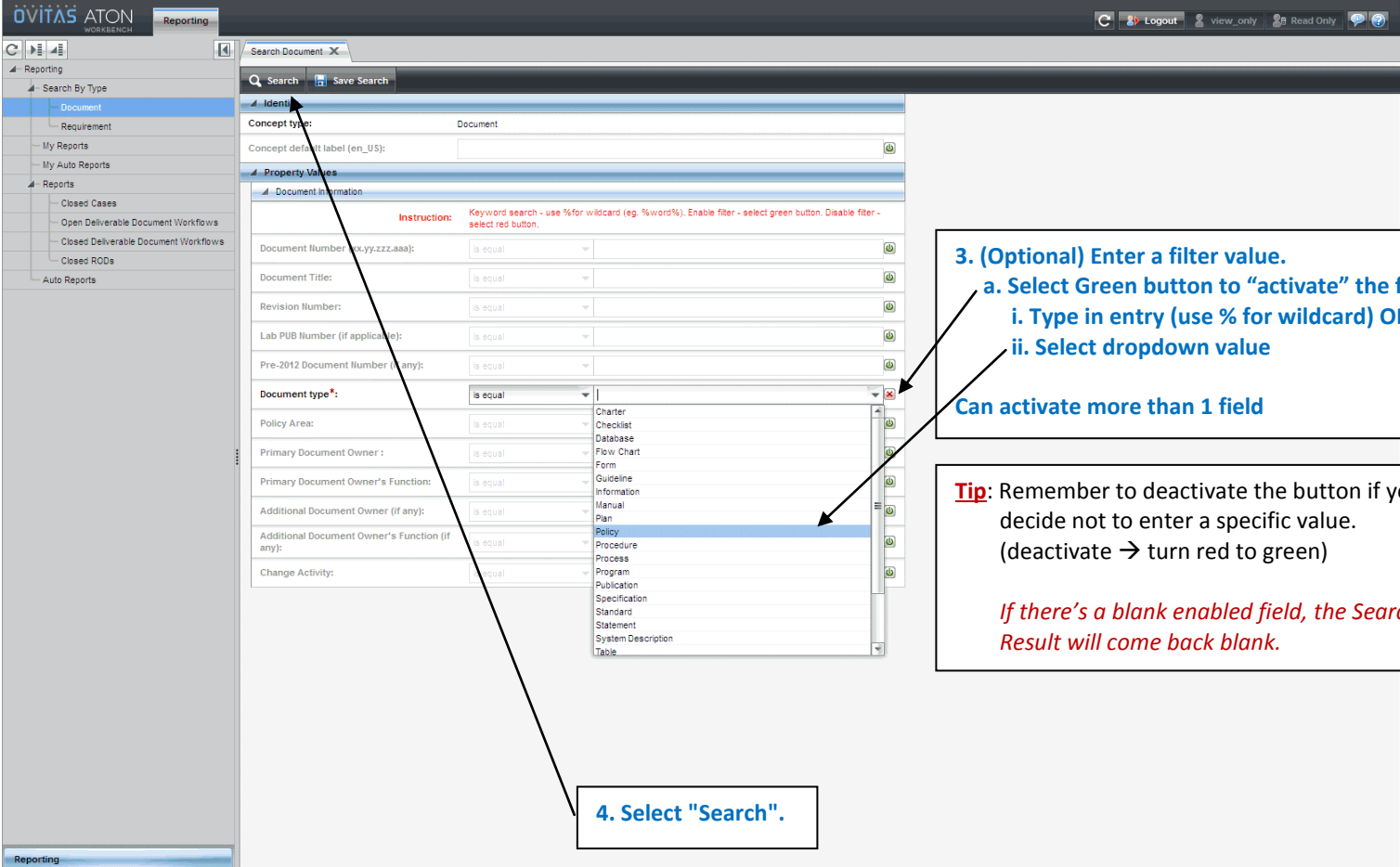
**1. Select.**

**2. Search Mask Panel for the Type appears.**

**3. (Optional) Enter a filter value.**  
 a. Select Green button to "activate" the field.  
 i. Type in entry (use % for wildcard) OR  
 ii. Select dropdown value  
 [See next page of this "How-to" for an example.]

**4. Select Search.**  
**[Warning: If no filter value is entered, the result will be all the concepts of this type found in the system - the total number could be very large!!!]**

[Example of dropdown list]



The screenshot shows the OvitAs ATON WORKBENCH Reporting interface. The 'Search Document' window is open, displaying a search form with various filters. The 'Document type' dropdown menu is open, showing a list of document types including Charter, Checklist, Database, Flow Chart, Form, Guideline, Information, Manual, Plan, Policy, Procedure, Process, Program, Publication, Specification, Standard, Statement, System Description, and Table. The 'Policy' option is highlighted. The interface includes a sidebar with navigation options like 'Search By Type', 'My Reports', and 'Reports'. The top bar shows 'Logout', 'view\_only', and 'Read Only' buttons.

**3. (Optional) Enter a filter value.**  
a. Select Green button to “activate” the field.  
i. Type in entry (use % for wildcard) OR  
ii. Select dropdown value  
Can activate more than 1 field

**Tip:** Remember to deactivate the button if you decide not to enter a specific value.  
(deactivate → turn red to green)  
*If there's a blank enabled field, the Search Result will come back blank.*

**4. Select "Search".**

## V03 Introduction to Search

After hitting "Search" button, after 5 to 20 seconds the Search Result list should appear. If no list (blank) appears, you have either over-constrained the search, or most likely, left an enabled field blank (de-activate or disable by turning green button to red).

**Note: "Label" is a concatenation of several Concept properties. This is intended to help User find the item of interest, without having to scroll left/right to search across columns.**

**(103 policies were found)**

**Filtered list of Docs results**

May wish to sort columns or rows, or expand window height to see more. (See "How-to" Topic V02 on adjusting screen views.)

Label	Version	Instruction	Document Number	Document Title	Revision Number	Lab RUB Number (i)	Pre-2012 Document	Document type	Policy Area	Primary Document	Primary Document	Additional Document	Additional Document
Policy/Accounts Receivable I	RELEASED 3.0		11.01.015.000	Accounts Receivable	1			Policy	Accounting	009534	OCFO - Controller		
Policy/Relocation or Change-	RELEASED 7.0		02.04.004.000	Relocation or Chan	1			Policy	Recruitment	005482	HR		
Policy/Reduction In Force Pol	RELEASED 5.0		02.12.004.000	Reduction In Force	3			Policy	Separation from En	005402	HR		
Policy/Quality Assurance Pol	RELEASED 2.0		04.03.001.000	Quality Assurance				Policy	Quality Assurance	017772	OIA/OCA		
Policy/Bridge Funding Policy/I	RELEASED 3.0		11.02.001.000	Bridge Funding Pol	1			Policy	Budget	023830	OCFO - Budget		
Policy/Signature Authority for	RELEASED 3.0		11.07.005.000	Signature Authority	1			Policy	Financial General F	023011	OCFO - Controller		
Policy/Work for Others (WFO)	RELEASED 3.0		11.01.007.000	Work for Others (V	1			Policy	Accounting	009534	OCFO - Controller		

Selecting specific Doc yields the details shown below.

**1. Select item (click).**

Label	Version	Document Number	Document Title
Policy/Document Management Policy//10.06.001.000/3	RELEASED 2.0	10.06.001.000	Document Management Policy
Policy/Early Problem Resolution//02.11.001.000/1	RELEASED 4.0	02.11.001.000	Early Problem Resolution

**2. Yields this display of details, including associations.**

**Identity**

Concept default label (en\_US): 20120809\_pol\_DocMgmt

Concept Smart label (en\_US): Policy/Document Management Policy//10.06.001.000/3

Concept Version Set: 20120809\_pol\_DocMgmt

Concept Type: Document

**Version Information**

**Property Values**

**Document Information**

Document Number (xx.yy.zzz.aaa): 10.06.001.000

Document Title: Document Management Policy

Document type: Policy

Document level (hierarchical relationship; SRD = 0): 3

Policy Area: Document Management

Latest Publication Date: 2011-08-01

Effective Date: 2011-08-01

Next Review Date: 2014-08-01

Primary Document Owner \*: Young, Lydia J

Primary Document Owner's Function: OIA/OCA

Document Approver: Hatayama, Howard K

State (Active, retired): active

Link to Document, Feedback, Policy Approval: <https://commons.lbl.gov/display/rpm2/Document+Management+Policy>

**Associations**

**Document to Document (Related Documents)** [Show Related Document\(s\)](#)

Related Document: Form/Non-Policy Document Approvals Form//10.06.001.204/6

Related Document: Template/Procedure, Program, System, Process Template//10.06.001.201/6

Related Document: Procedure/Storing, Retrieving, Archiving Institutional Documents Procedure//10.06.001.103/5

Related Document: Guideline/Style Guide for Institutional Documents//10.06.001.901/6

Related Document: Process/Managing Institutional Documents Process//10.06.001.001/4

Related Document: Form/Policy Template & Information Form//10.06.001.202/6

Related Document: Procedure/Developing, Reviewing, Approving, Institutional non-Policy Documents Procedure//10.06.001.101/5

Related Document: Procedure/Updating the RPM//10.06.001.104/5

Related Document: Form/Policy Approvals Form//10.06.001.203/6

Related Document: Procedure/Developing, Reviewing, Approving, Institutional Policy Documents Procedure//10.06.001.102/5

**Document to Document (Related Documents)** [Show Document\(s\)](#)

Document: Program/LBNL Operations and Quality Management Program (OQMP)//1

Document: Policy/Organizational Self-Assessment Policy//04.02.002.000/3

Document: Policy/Requirements Management Policy//04.04.001.000/2

Document: Policy/Quality Assurance Policy//04.03.001.000/2

**Requirement to Supporting Document (Supporting Docs)** [Show Requirement\(s\)](#)

Requirement: L76/DEAR 970.5203-1/Management Controls//0

**Resources**

**These docs are "children" of this policy (supporting)**

**These docs are "parents" of this policy (driving)**

See "How-to" topic #V04 to learn how to follow the trail of associations from this searched item.

## **VI. Other Related “How-to’s for the RMS**

- V00 – Cheatsheet for General Users
- V01 – Definitions to Help Use and Search the RMS *[VERY USEFUL!]*
- V02 – Basic Screen Orientation
- V03A – Searching the RMS (video and text)
- V04 – Following Associated Thread from Searched Item
- V05 – Generating a Report
- V06 – Exporting Data
- V11 – Creating a Private Search Mask
- V99 – Beginners RMS Do-It-Yourself Training Script

## **VII. Revision History**

Revision	Date	Who	Description
0	10/5/2012	L.J. Young	Initial
0.1	12/14/2014	L.J. Young	Formalize formatting, update cross--references