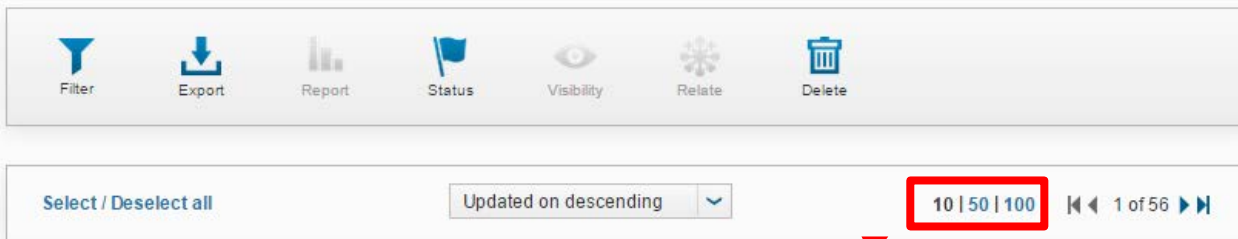


How to change the List view and use the Filter function in ResearchPAD

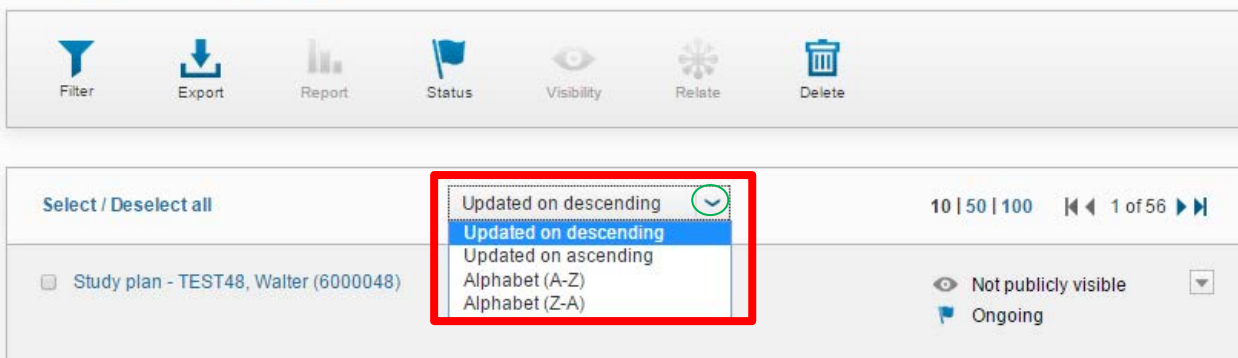
1. To change the number and order of student records you see within a list.

Study Plans (557)



- i. Click on 50 or 100 to see more records on one page. *CTRL+F* can then be used to search for a name on each page.

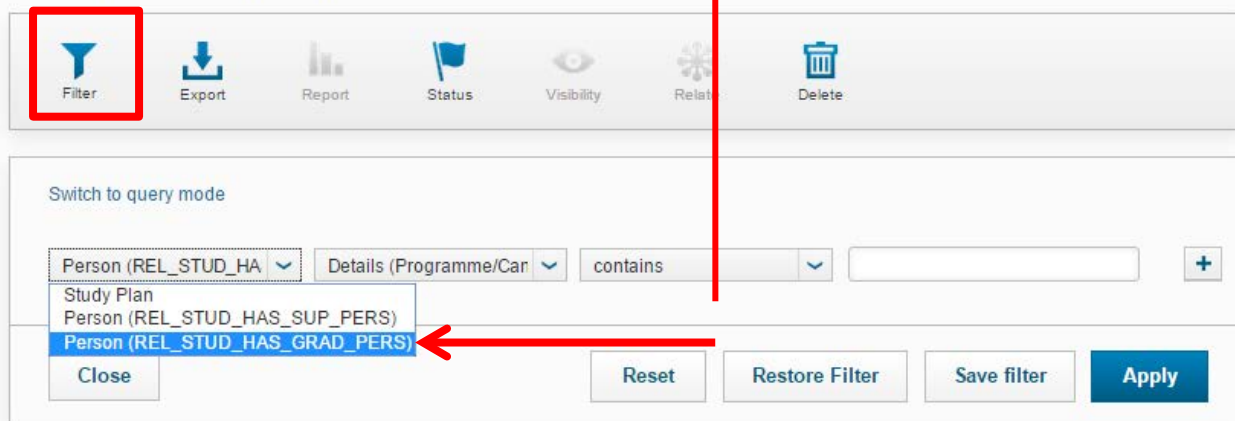
Study Plans (557)



- ii. The default in which students records appear is **Updated on descending**. To change the order click on the down arrow and change the view.

2. To use the **Filter function** to search for an individual record:
 - i. To Find a Study Plan – Select *Study Plan* from the drop down list – start by clicking the **Milestones menu** and selecting Study Plans.
 - ii. Select Filter and select the '*Person (REL_STUD_HAS_GRAD_PERS)*'

Study Plans (557)



Filter Export Report Status Visibility Relate Delete

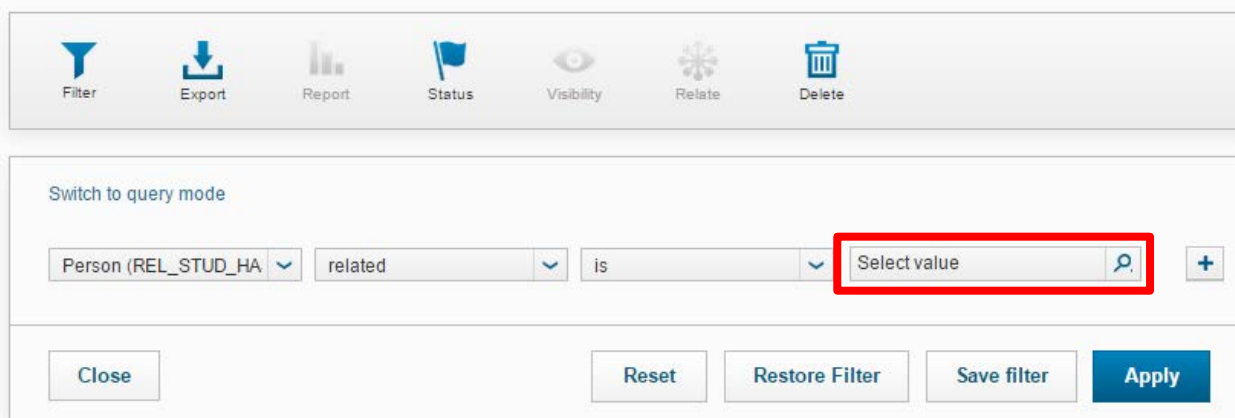
Switch to query mode

Person (REL_STUD_HA) Details (Programme/Car) contains

Study Plan
Person (REL_STUD_HAS_SUP_PERS)
Person (REL_STUD_HAS_GRAD_PERS)

Close Reset Restore Filter Save filter Apply

Study Plans (557)



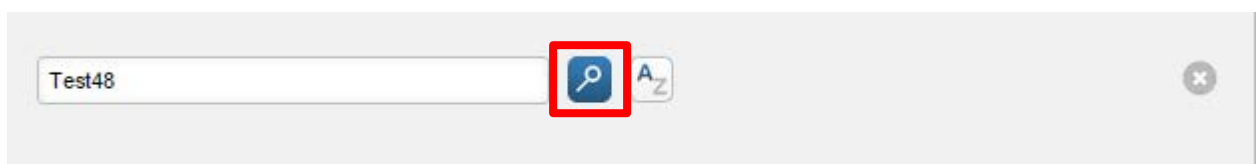
Filter Export Report Status Visibility Relate Delete

Switch to query mode

Person (REL_STUD_HA) related is Select value

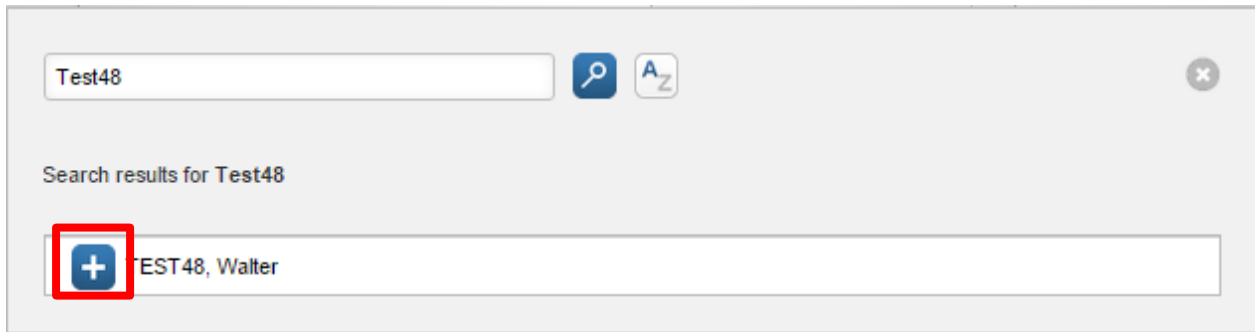
Close Reset Restore Filter Save filter Apply

- iii. Click in *Select value*
- iv. Type the surname into the pop up box and select the search function to find that record



Test48

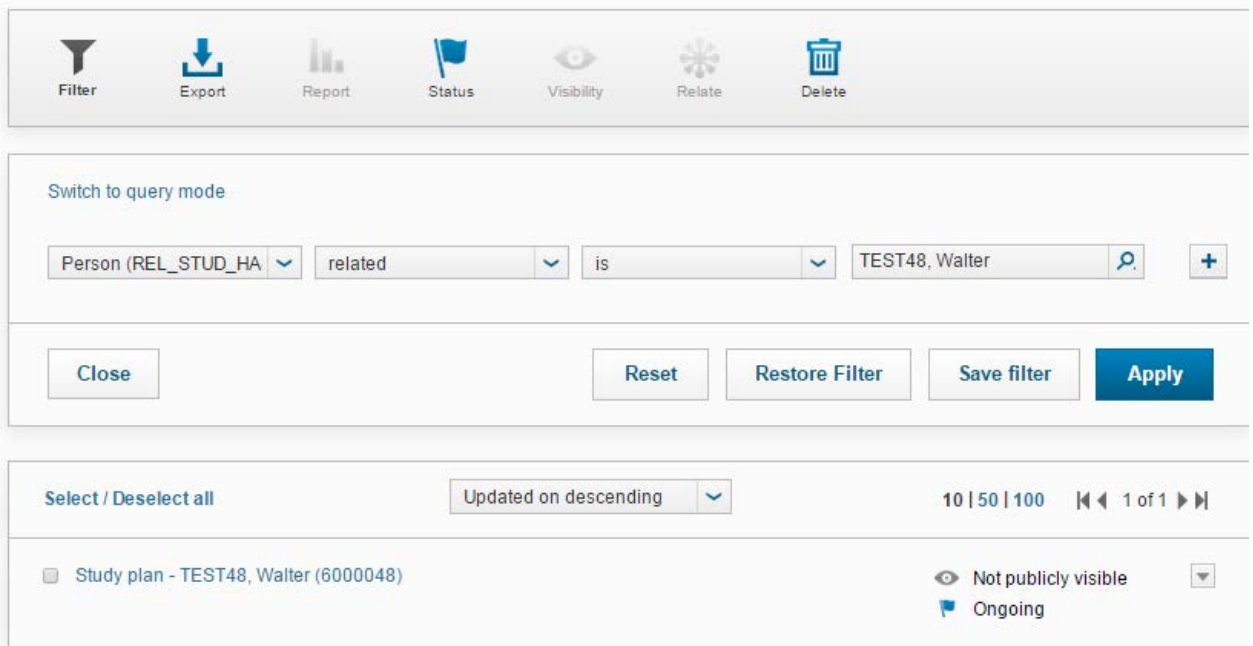
- v. Click the +button against the right name from the drop down list to add the name to the search criteria:



- vi. Click on apply and the Study Plan matching your search criteria will appear.



Study Plans (1)



The screenshot shows the 'Study Plans (1)' interface. At the top, there is a toolbar with icons for Filter, Export, Report, Status, Visibility, Relate, and Delete. Below the toolbar, there is a section titled 'Switch to query mode' with a query builder. The query builder contains the following criteria: 'Person (REL_STUD_HA)' (dropdown), 'related' (dropdown), 'is' (dropdown), and 'TEST48, Walter' (text input). Below the query builder, there is a filter control bar with buttons: 'Close', 'Reset', 'Restore Filter', 'Save filter', and 'Apply'. At the bottom, there is a table with one row: 'Study plan - TEST48, Walter (6000048)'. The table has a 'Select / Deselect all' button, a 'Updated on descending' dropdown, and a '10 | 50 | 100' dropdown. The table row has a checkbox, a visibility icon, and a status icon.

2. For other milestones, (e.g. **Probationary Reviews etc.**), select *Probationary Review* from the Milestones menu, Select Filter and select '*Study Plan (REL_STUD_HAS_INIT)*' from the drop down list

Key for other milestones select:

- | | |
|------------------------|---------------|
| 1. Re-Enrolment Review | = AMON |
| 2. Major Review | = TFER |
| 3. Intention to Submit | = ITEN |
| 4. Declaration | = DECL |
| 5. Viva | = VIVA |
| 6. Conferment | = CFER |

and follow Step 2 above

The Contents list displayed on the home screen of the old version of the system is not available in the new version. However, the total number of items for each milestone can still be accessed by clicking on the relevant item from the '**Milestones**' menu. Filters have been set up so that you can list all those within the various categories such as **Draft, Further Information, For Approval, Approved & Completed.**

It is important to note that the '**Things to Do**' list automatically applies a filter to the data content, restricting the list of items to those in the relevant statuses (e.g. draft). This filter remains in place throughout the entire login session, unless it is explicitly cleared by the user. Consequently, returning to the Milestones list after viewing all the items in the 'Things to Do' list will result in no changes to the data displayed. To clear the filter so that all data is displayed, click on the 'Filter' button and then on 'Reset', as shown below.

Click Filter

Probationary Reviews (2022)

Switch to filter mode ?

```
<?xml version="1.0" encoding="UTF-8"?>
<filter for="initialReview" xmlns="http://converis/ns/filterengine">
  <and>
    <and>
      <or>
        <attribute operator="notset" argument="" name="commDDREEndorOLD"/>
        <attribute operator="equals" argument="" name="commDDREEndorOLD"/>
      </or>
    </and>
  </and>
</filter>
```

Close Then click Reset Reset Restore Filter Save filter Apply

Why Do the Filter Screens Look Different?

The new version has two filter modes:

- Filter mode – this is the same as the filter in the old version.
- Query mode – this allows technical users to configure more complex filters.

Most users will only ever use **Filter mode**, although the system will sometimes offer **Query mode** as the default (see above). If this happens, click on [Switch to query mode](#) to return to the more familiar filter mode. See below:

Switch to query mode ?

Probationary Review _Status_process equals Draft +

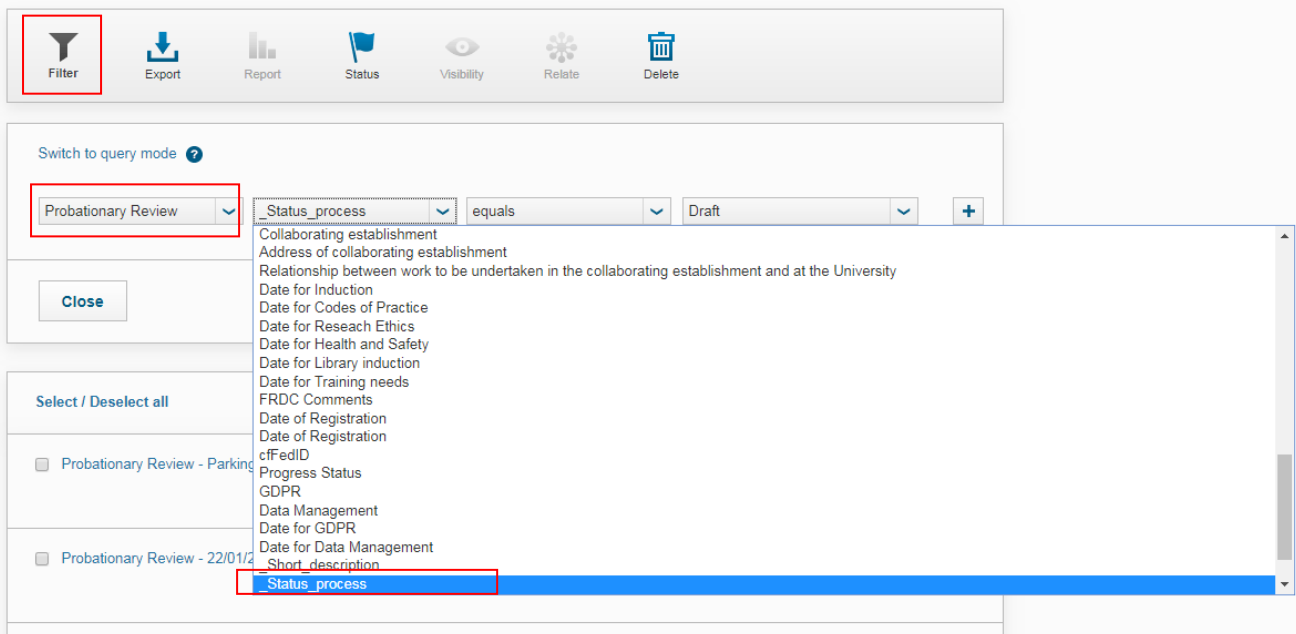
Close Reset Restore Filter Save filter Apply

How to select the desired filter (e.g. approved)

Defined Filters have been created for each Status (Draft, Further Information, For Approval, Approved and completed). To select the appropriate filter criteria:

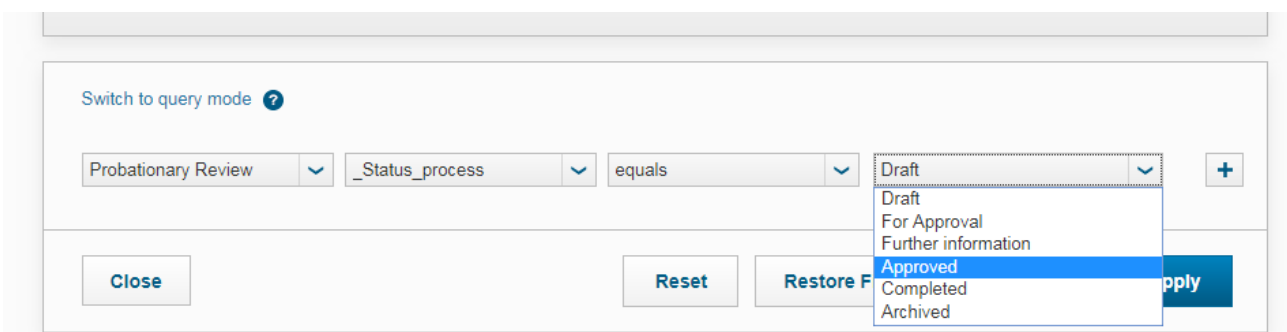
1 click **Filter** → Select **Probationary Review** → Select **_Status_process**

Probationary Reviews (2022)



The screenshot shows the ResearchPAD interface for 'Probationary Reviews (2022)'. At the top, there is a toolbar with icons for Filter, Export, Report, Status, Visibility, Relate, and Delete. The 'Filter' icon is highlighted with a red box. Below the toolbar, there is a section for 'Switch to query mode'. The first dropdown menu is set to 'Probationary Review' and is highlighted with a red box. The second dropdown menu is set to '_Status_process' and is also highlighted with a red box. A list of filter criteria is displayed, including 'Collaborating establishment', 'Address of collaborating establishment', 'Relationship between work to be undertaken in the collaborating establishment and at the University', 'Date for Induction', 'Date for Codes of Practice', 'Date for Research Ethics', 'Date for Health and Safety', 'Date for Library induction', 'Date for Training needs', 'FRDC Comments', 'Date of Registration', 'Date of Registration', 'cFedID', 'Progress Status', 'GDPR', 'Data Management', 'Date for GDPR', 'Date for Data Management', 'Short_description', and '_Status_process'. The '_Status_process' filter is highlighted with a blue background and a red box.

2 To select the appropriate Status, click on the down arrow and select the from the dropdown menu



The screenshot shows the ResearchPAD interface for 'Probationary Reviews (2022)'. The dropdown menu for '_Status_process' is open, and the 'Approved' option is selected and highlighted with a blue background. The dropdown menu also includes options for 'Draft', 'For Approval', 'Further information', 'Completed', and 'Archived'. The 'Apply' button is visible at the bottom right of the interface.

3 Click **apply**



The screenshot shows the ResearchPAD interface for 'Probationary Reviews (2022)'. The 'Apply' button is highlighted with a red box. Other buttons visible include 'Close', 'Reset', 'Restore Filter', and 'Save filter'.