General Settings and Navigation

This guide shows staff how to navigate Research Master and customise their views to suit their individual requirements.

Guidelines and rules

Customisation of screens is specific to each user and will be saved/retrieved for each log on. This is in ADDITION to views available based on your access level and user role.
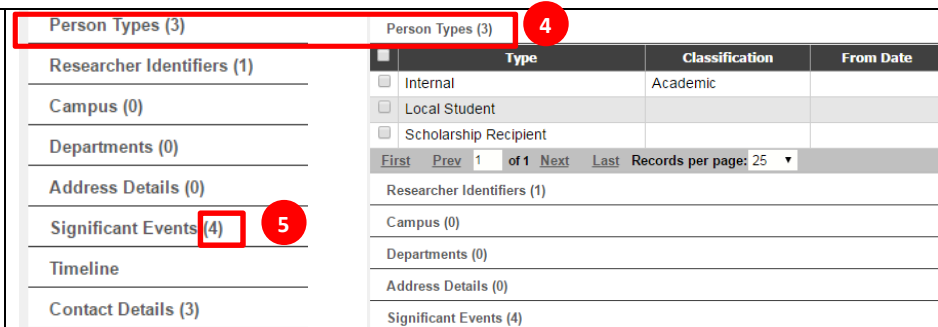
Selecting records to view

1. When presented with a list of records (either a full list of all records or the result of a search for specific data) hover your mouse over **ANY** part of the line the record occupies, and click to open the record. (The selected record will be highlighted for confirmation)

2. If you need to select multiple records, use the tick box to the left of the record. You will then be able to manipulate several records at once. (Delete, export etc)

3. Clicking on any column heading will order records based on that field in ascending order (A to Z or lowest to highest numerically)

   Clicking the same column heading a second time will reorder the records based on that field in descending order (Z to A, or highest to lowest numerically)

Person Code	Preferred Full Name	Staff ID	Current?	Middle Name	Student ID	Person Type	First Name
0000012345	Lucy Pearce		☑			Not Specified	Lucy
0000015000	Amy Isaksson	0000015000	☑		0000015000	Internal	Amy
0000015003	Gay Gorrie	0000015003	☑			Internal	Gay
0000015009	Sir Ken Kumar	0000015009	☑			Internal	Ken
0000015010	Ms Laura Ladson		☑		0000015010	Internal	Laura
0000015015	The Hon Percy Pearce		☑			External	Percy
0000015016	Dr Tracey Tonge	0000015016	☑	Susan		Internal	Tracey
0000015018	Stan Storer	ST0015018	☑		s1234567	Internal	Stan
0000015021	Prof Beatrice Belmont	0000015021	☑			Internal	Beatrice
0000015024	Mr Ari Abbott	1000015024	☑		0000015024	Internal	Ari
0000015030	Prof Madge MacIntyre		☑			External	Madge
0000015033	Rev Ray Reynolds	0000015033	☑			Not Specified	Ray
0000015036	A/Prof Colin Chang	0000015036	☑			Internal	Colin

Personnel (259)   Add   Delete   Export

Navigating your screen

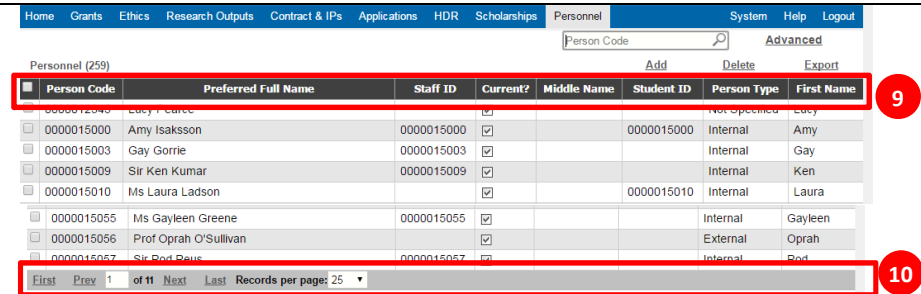|	
4. When you open a screen with information, it may have multiple sections. To open a section, click on the **section title** to expand. 5. The number in brackets at the end of the **section title** tells you how many records are currently saved in this section • If there are not records in the section (indicated by "**(0)**", click on **Add** to create a new record or view available fields)	Person Types (3) ... Person Types (3) ④ Researcher Identifiers (1) — Type / Classification / From Date Campus (0) — Internal / Academic Departments (0) — Local Student Address Details (0) — Scholarship Recipient Significant Events (4) ⑤ Timeline Contact Details (3) First Prev 1 of 1 Next Last Records per page: 25 ▼ Researcher Identifiers (1) Campus (0) Departments (0) Address Details (0) Significant Events (4)

6. At the top of each screen (just below the menu) is a "Cog" icon. Hoveryour mouse over this icon to expand. Click on the section title to go straight to this section and expand the selection
 	
7. This is a quick navigation to each section on the page. As above, it also give you (in brackets) the number of records in each section
 	
• Other available commands are:
 	
    EXPAND all sections
 	
    COLLAPSE all sections
 	
    Create a new record
 	
    Navigate to **previous** available record
 	
    Navigate to **next** available record
	⑥ ⚙ Personnel (3/259)
	
	Save Layout
	
	Person Types (3) ⑦
	Researcher Identifiers (1)
	Campus (0)
	Departments (0)
	Address Details (0)
	Significant Events (4)

Searching for records - Direct

8. When you open a module, you will be presented with **ALL** available records 9. Use the column headings to reorder the records (see dot point number 3) 10. Use the page navigation icons at the bottom to search through all records	

Searching for records - Basic

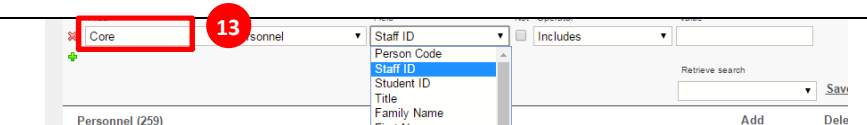|	
11. At the top of the screen, there will be a search box that defaults to the most popular search for that screen. Simply enter the code specified and hit enter or the search icon 	 • *Please Note: In the above example, it will **ONLY** perform a Basic Search on the **Person Code***

Searching for records - Advanced

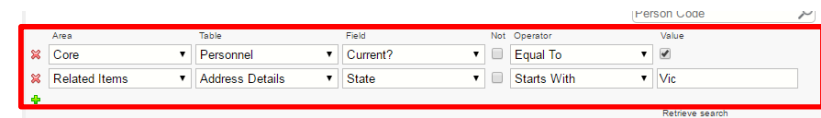|	
12. Click on the **Advanced** search next to the Basic search field	
13. Using **CORE** as the b, you can search on any field within the main table Changing this field will allow you to search on some fields within the sub-forms used on the page. For Example, within the Personnel module, you can change the area to "Related Items" to search on the postcode within the Address sub-form	

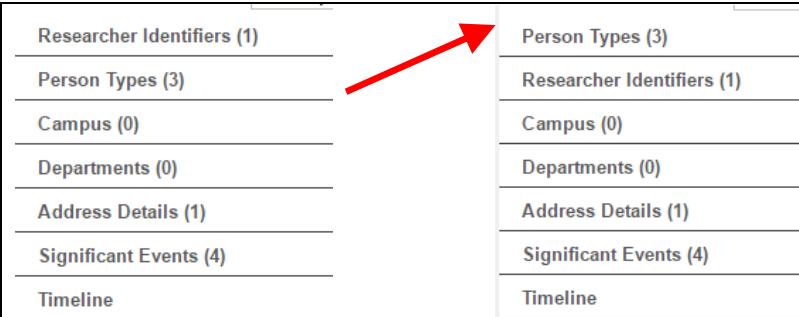|		
14.	By clicking on the Additional criteria icon, you can "stack" your search to get a more detailed result ➕ The attached sample will search for all CURRENT Personnel who have an address in the State of Victoria (By utilising the "starts with" identifier, we get entries from Vic, Vict, Victoria)	
15.	You can save this set of search criteria to reuse at a future time by naming it in the **Retrieve Search** section and hitting **Save**	

Customising your screens

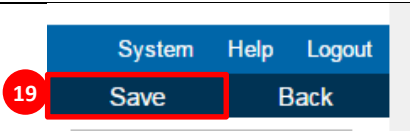|	
16.	By clicking on the section heading of each screen, you can drag and drop it to whatever position you prefer • This will also re-order the sections when you use the Cog icon

17. As outlined above (Point 4), you can expand and collapse sections as required

18. Once you have the layout of your screen that is most productive for you, you can save the layout so it becomes the default each time you open the screen. Just open the "**Cog**" icon and click on **Save Layout.**

   This layout is specific to the user who saves it and relates to the order of sections within the screen and which sections are expanded/collapsed

Saving a record

19. After making your changes, navigate to the top of the screen and click on the word **SAVE**.

   If you make changes and attempt to leave a screen without saving, the system will prompt you and confirm if you wish to save the record or not.