

Locating Your Content, Summary Screens & Filtering

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Locating your content

If you are a personal user, you can jump directly to your content by clicking on the category on your [personal user overview screen](#). Alternatively:

- Click on the downward arrow next to  along the top (or  for those with editor rights) and then choose the desired content type.
- Or click on  along the top instead (only leads to applications, awards, projects, ethical reviews and milestones).

Summary screens

When you create a new record, it is added to the summary screen for that content type. You can change how these summaries are presented and even filter these screens to narrow what is displayed.

Summary screens contain different information depending on the content type. *Applications* content is used for this user guide, but the basic principles remain the same for all.

Layout

In the upper right-hand side of the summary screen is a series of icons, each of which changes the summary screen layout: Views    

The  **list view** gives you links at the bottom of the page to export the summary.

In the  **table view**, you can drag columns into your preferred order or hide them by clicking on  and unticking the columns you do not want to display.

Filtering your summary screens

If your content is not visible, you may have a filter applied so check the menu on the left-hand side e.g. the *Editable* filter only shows content you can still edit.



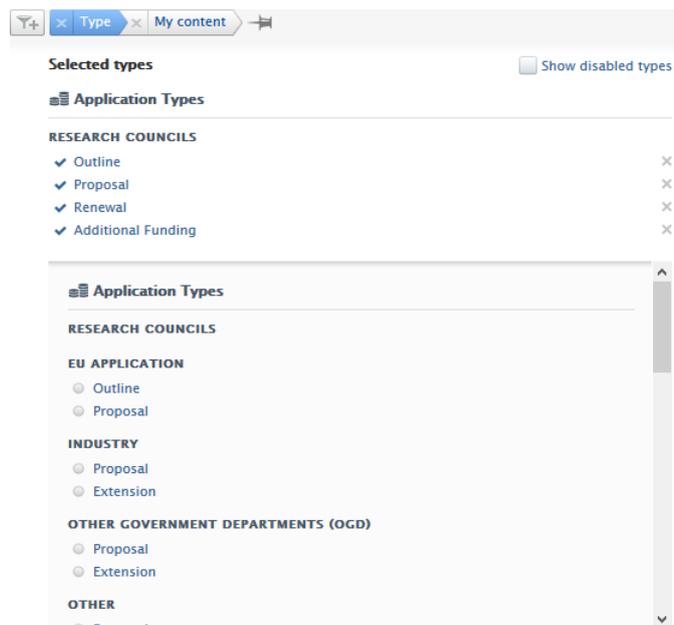
| Applications | |
|-----------------------|---|
| Editable | 0 |
| My applications | 1 |
| Awaiting pre-approval | 0 |
| Ongoing | 1 |
| Awarded | 0 |
| Unsuccessful | 0 |
| Aborted | 0 |

The number in the bubble indicates how many records are in each filter.

Some filters are system-defined but you can add your own filters to your summary screen, allowing you to focus on records that meet certain criteria for your needs. Only you can view the filters you create.

This example describes how to filter your applications on just external funding types, although the principles remain the same for any filter you apply.

- Click  above the summary area and select *Type* from the drop-down list.
- Your variable appears next to the filter button and you can select application types from a list.
- As you select them, they appear above the list with a tick next to them.
- You can deselect them by clicking them again.
- Add more filters as required.
- Once you are happy with your filtered summary, click , name the filter, and save.

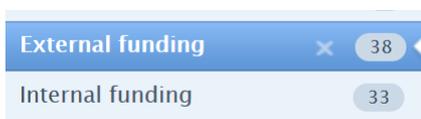


The screenshot shows the 'Selected types' section with a 'Show disabled types' checkbox. Under 'Application Types', there are three categories: 'RESEARCH COUNCILS' (with 'Outline', 'Proposal', 'Renewal', and 'Additional Funding' selected), 'EU APPLICATION' (with 'Outline' and 'Proposal' available), 'INDUSTRY' (with 'Proposal' and 'Extension' available), 'OTHER GOVERNMENT DEPARTMENTS (OGD)' (with 'Proposal' and 'Extension' available), and 'OTHER' (with 'Proposal' available).



The dialog shows a filter named 'External funding' with a 'Save' button. The filter is currently applied to the 'Type' filter.

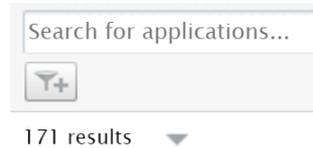
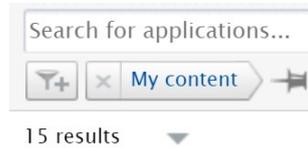
- Your filter is now available under Applications on the left-hand side:



| | |
|------------------|----|
| External funding | 38 |
| Internal funding | 33 |

My content

 is applied by default. Removing this filter will display all applications in the system (depending on the [content visibility settings](#)), although you will only see a limited amount of metadata relating to others' content unless you have a Pure user role that grants you access to the full details.



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