

**TIP:** Words in italics are included in *RADR Quick Guide: Glossary*.

### General Navigation

Every web page within RADR contains consistent navigation enabling you to perform certain functions regardless of where you are in the application.

**PLEASE NOTE:** Using any of the functions detailed below will **NOT SAVE** any data that has been entered.

1. Clicking on a tab will quickly navigate you to that RADR function.
2. As you go to *Search Results*, or another area within RADR, *Breadcrumbs* will be added just below the tabs. Clicking on the name of a web page within the *Breadcrumbs* will return you to that web page.
3. Clicking on *Logout All* will close the window, take you out of RADR, *AND* log you out of access.caltech.
4. Clicking on *Exit* will close the window and take you out of RADR.
5. Clicking on *Help* will navigate you to the search results for documents in the *Help* Repository.
6. Clicking on *Home* will return you to *Search*.



### Tabs

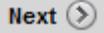
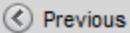
Tabs are a navigation aid providing access to the primary functions of RADR. The available Tabs are dependent on the *Role(s)* you have been given in RADR. If you do not think you have the proper *Role(s)*, please contact your organization’s grantor of RADR Roles. Tabs include:

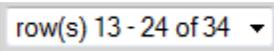
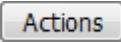
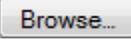
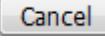
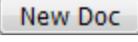
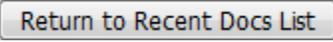
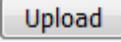
- **Search:** The Search function doubles as the Home screen for RADR. Search is where it all starts when you are looking for documents.
- **Upload:** The Upload function is available to those users who have the ability to upload documents to at least one *Repository*.
- **Mass Upload:** A small subset of *Upload Types* also have the ability to utilize a template containing the metadata in order to upload many documents all together at the same time.
- **Recent Docs:** This tab will appear only if you have previously uploaded a document or modified the metadata of a document. *Recent Docs* is a list, in chronological order (newest dates first), of these documents.

- **Fix Broken Links:** On occasion the *Primary Link* of a document will change in the source system (e.g., the Funding Source Award Number for an Oracle Award). This function enables you to quickly fix the broken link.
- **Define Users:** The granting of RADR roles is distributed out to the user community. If you have a role with the ability to grant roles to other users this function enables you to do this.
- **My RADR Access:** Lists your individual access within RADR.
- **Setup:** This function is only available to IMSS staff. RADR’s design enables modification to search and upload screens, user roles, document groups and types, and primary and derived links.

### Icons and Buttons

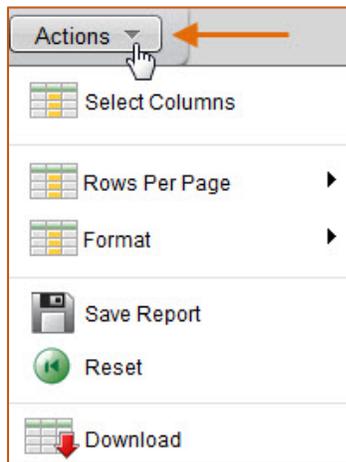
Icons and buttons are used throughout RADR to assist you as you navigate through the functionality.

Icon/Button	Usage
	Navigation to view the <i>metadata</i> associated with the document. If you have a role that allows using the <i>Upload Type</i> used for the document then you will be able to modify the metadata associated with the document.  If you do not have access to the Upload Type, then you can only view the metadata.
	Indicates that the document has been flagged as <i>Confidential</i> .
	Deletes an item in a list, for example, a user’s RADR Role.
	Select the item(s) on which an action will be performed, for example deleting a <i>Primary Link</i> .
	Assists in choosing a date or date range. Date range searches utilize the <i>Document Date</i> .
	Opens a search pop-up window. To select a search result, click on the link of the item that you would like to select.
	Navigates to the next set of records in a list that is longer than the form will show.
	Navigates to the previous set of records in a list that is longer than the form will show.

	<p>Indicates what portion of the returned set is currently being shown and the total number of records (rows) in the set. This is a drop down list that enables you to jump further ahead into the set of records.</p>
	<p>Indicates that the field has an associated drop down list.</p>
	<p>Activates the APEX actions available for the list.</p>
	<p>Enables the user to add another primary link to a document.</p>
	<p>Saves any changes/modifications you have made to a document's metadata.</p>
	<p>Opens a window to allow you to navigate to the document that you are intending to upload.</p>
	<p> Cancels the function and returns you to the previous screen.</p>
	<p>Creates a new record, e.g., adding a new user to RADR.</p>
	<p>Deletes the document.</p>
	<p>Combined with checking of the box, deletes primary link(s) associated with a document.</p>
	<p>Navigates to the Upload Type screen.</p>
	<p>Clears all search criteria previously entered.</p>
	<p>Navigates to the user's list of Recent Docs that they have uploaded and/or updated.</p>
	<p>Initiates a search for documents based on the search criteria entered.</p>
	<p>Uploads the document and saves the <i>metadata</i> associated with the document. Also derives the search terms and security based on the <i>Primary Link(s)</i>.</p>

### APEX Actions

RADR was developed using Oracle APEX. This tool includes a group of functions called Actions. Actions are available when a list of items is shown to the user. With these Actions you can remove/add columns, change the order in which the columns appear, change the sort, format the data in a column, and save different versions of the list.



**PLEASE NOTE:** The *Reset* option will return the list to the default settings.

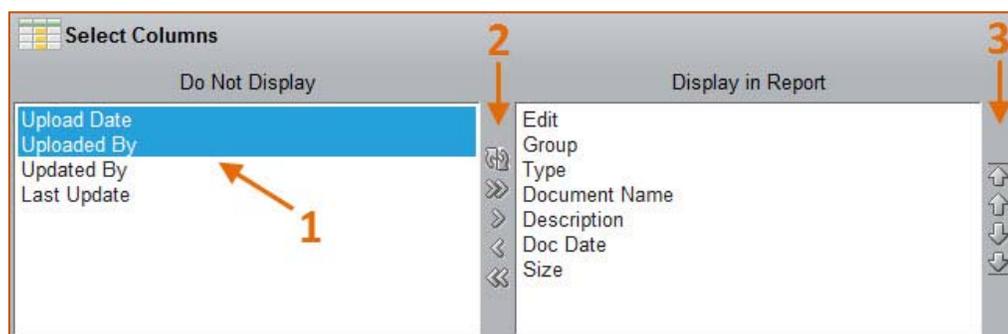
### Select Columns: Removing and Reordering Columns

The Select Columns option enables you to choose and reorder the columns that you want to display in your report. Choosing Select Columns opens a window in which you can:

1. Select the columns(s) you would like to display or not display.

*Tip:* Use the **Ctrl** key to select more than one column at a time.

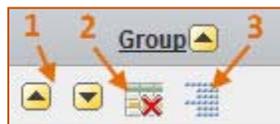
2. Use the arrows between the two columns to move the selections from *Do Not Display* to *Display* and back.
3. Use the up and down arrows on the right to change the order of the columns.



### Actions on Columns

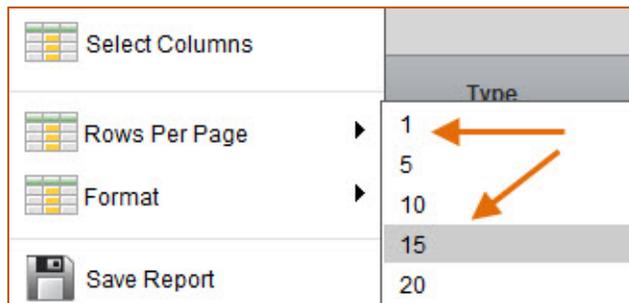
You can further fine-tune your list by clicking on the Column Header.

1. Clicking on Sort icon on the left will sort the column in ascending (e.g., A-Z) order and clicking on the Sort icon on the right will sort the column in descending (e.g., Z-A) order.
2. Clicking on the Hide Column icon will remove the column from the list. There are, however, certain fields in which this option is not available, e.g., Document Name.
3. Clicking on the Control Break icon will provide a section break at each change in value, which may be useful with the Document Group.



### Rows Per Page

The Rows Per Page option enables you to determine how many rows are displayed on a page.



### Format

The Format option enables you to apply a custom sort on one or more columns and place a control break on a column.

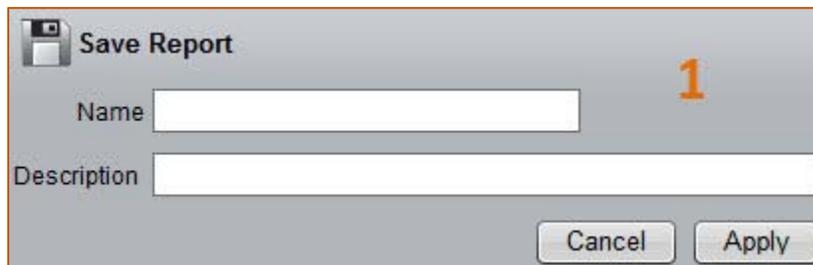
1. Sort opens enables you to select the columns on which you want to sort, and the order in which the sorting occurs.
2. Control Break enables you to select the column(s) on which you want to have a break at each change of value.



## Save Report

Save report enables you to save all of the formatting that you have just completed so you can reuse it in the future.

1. Name the report and click on the Apply button.



2. After you have saved the report a list of Reports will become available from which to choose the appropriate report.
3. If you no longer need a report format, save it by clicking on the Delete Report icon.

