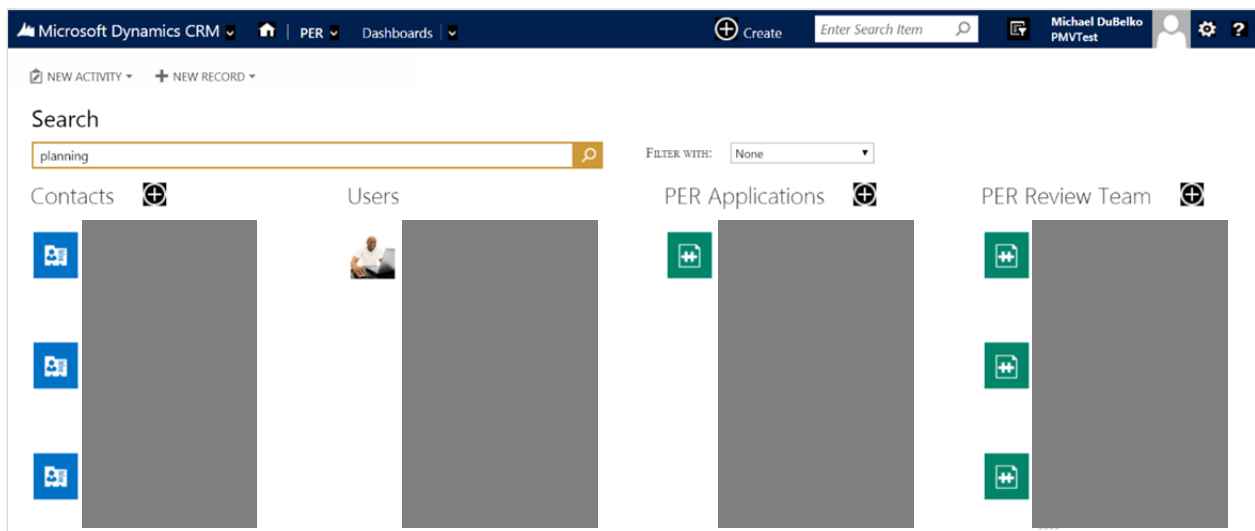


### 2.1.3 Opening an Application's or Review Team's Record by Searching

The fastest way to open to an application's or Review Team's record is to search for it using the *Global Search*. You can search by:

- Project Title
- PER reference number
- Contacts assigned to the record
- VFPA Project Description
- Project Lead comments
- Tenant name
- Existing tenant

When you submit a search, the *Search* page will display search results in lists categorized by record type.



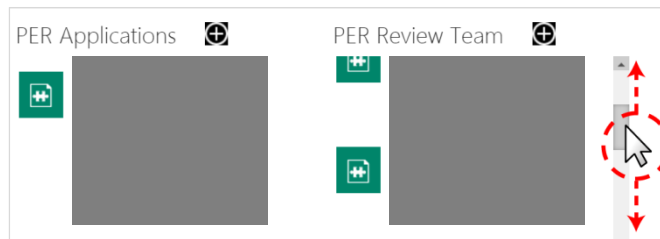
Search results in the *Search* page.

**To open a record by searching:**

1. Click inside the **Global Search** field in the Navigation bar.



2. Type your search term(s) and hit **Enter**. You will be taken to the *Search* page, which will display the search results in category lists.
3. Hover over the appropriate category list (*PER Applications* or *PER Review Team*) and scroll to browse the results.



4. Select a record from the list.

e-PER will take you to the selected application's or review team's record.

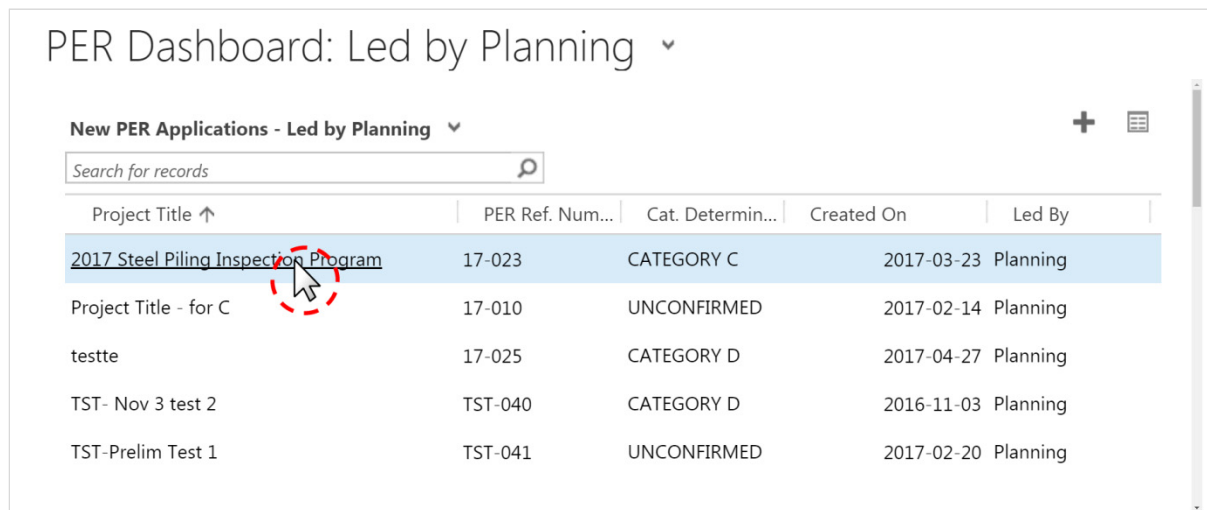
### 2.1.4 Opening an Application's or Review Team's Record from a Dashboard

Dashboards are the best place to browse records, as they display multiple Views.

Before you begin, you must open a Dashboard (see *2.1.2 Opening a Dashboard*).

#### To open an application's or Review Team's record from a Dashboard:

1. Open a Dashboard (see *2.1.2 Opening a Dashboard*) and browse to a View.
2. From the View, select an application or Review Team's record by clicking its *Project Title*.



PER Dashboard: Led by Planning

New PER Applications - Led by Planning

Search for records

Project Title ↑	PER Ref. Num...	Cat. Determin...	Created On	Led By
<u>2017 Steel Piling Inspection Program</u>	17-023	CATEGORY C	2017-03-23	Planning
Project Title - for C	17-010	UNCONFIRMED	2017-02-14	Planning
testte	17-025	CATEGORY D	2017-04-27	Planning
TST- Nov 3 test 2	TST-040	CATEGORY D	2016-11-03	Planning
TST-Prelim Test 1	TST-041	UNCONFIRMED	2017-02-20	Planning

e-PER will take you to the selected application's or Review Team's record.

### 2.1.5 Browsing Views in a Dashboard

The default Dashboards contain views for *New*, *Active* and *Closed* applications. You can further sort a View by some of its fields.

Views display a limited number of PER applications at a time. You can open it in a new browser window to display more applications.

Before you begin, you must enter Dashboards Mode (see 2.1.2 *Opening a Dashboard*).

#### Sorting a View by a Field

You can sort a View by some, but not all of its fields. The common sortable fields are:

- Project Title
- PER Reference number
- Category Determination
- Created On Date

#### To sort a View by a field:

1. In a View, click the column title of the field you wish to sort.

Project Title ↑	PER Ref. Number	Cat. Determination	Created On	Led By

The View will re-sort based on the chosen field. An up arrow ↑ or down arrow ↓ will appear to the right of the column title to indicate that the View is sorted in ascending or descending order.

2. If you wish to reverse the list direction (for example, from *Newest to Oldest* to *Oldest to Newest*), click the column title cell again. The list will reverse direction, and the arrow will also reverse direction.

You can now browse and select a record from the sorted View.

#### Opening a View from a Dashboard

If you need to see more results in a View than what a Dashboard displays, you can open it in a new browser window.

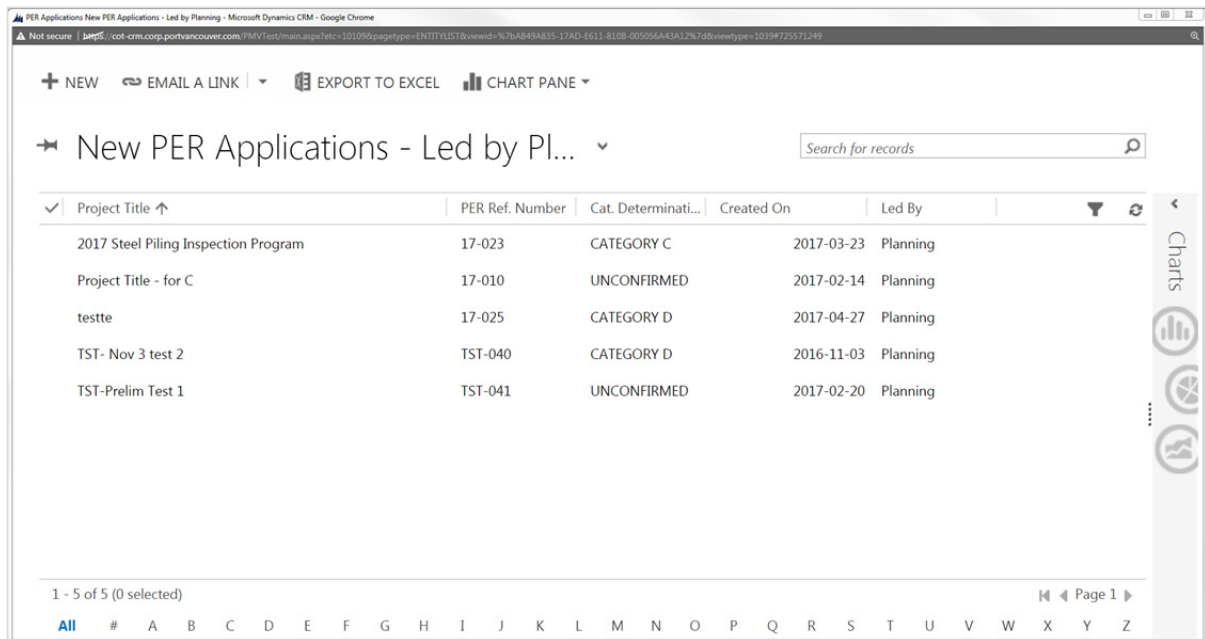
Before you begin, you must open a Dashboard.

## To open a View from a Dashboard:

1. Click the **See Records button** (  ) at the top-right of a View.

New PER Applications - Led by Planning				
Search for records				
Project Title ↑	PER Ref. Num...	Cat. Determin...	Created On	Led By
Project Title - for C	17-010	UNCONFIRMED	2017-02-14	Planning
testte	17-025	CATEGORY D	2017-04-27	Planning
TST- Nov 3 test 2	TST-040	CATEGORY D	2016-11-03	Planning
TST-Prelim Test 1	TST-041	UNCONFIRMED	2017-02-20	Planning

A new window containing the View in full will open.



Project Title ↑	PER Ref. Number	Cat. Determinati...	Created On	Led By
2017 Steel Piling Inspection Program	17-023	CATEGORY C	2017-03-23	Planning
Project Title - for C	17-010	UNCONFIRMED	2017-02-14	Planning
testte	17-025	CATEGORY D	2017-04-27	Planning
TST- Nov 3 test 2	TST-040	CATEGORY D	2016-11-03	Planning
TST-Prelim Test 1	TST-041	UNCONFIRMED	2017-02-20	Planning

2. To make the View even bigger, you can maximize the window by clicking the **Maximize** button at the top-right of your web browser window.



You can now browse, sort and select records from the View.