Work Instruction
Using the search and lookup functions

Overview

This Work Instruction provides guidance on how to use the search and lookup functions in the RSHQ Portal. We will demonstrate this process using the incident 'Cases' module. This process is the same throughout the Portal.

Note: **Bold** words in the text refer to field, link, and button names within the Portal.

Prerequisites

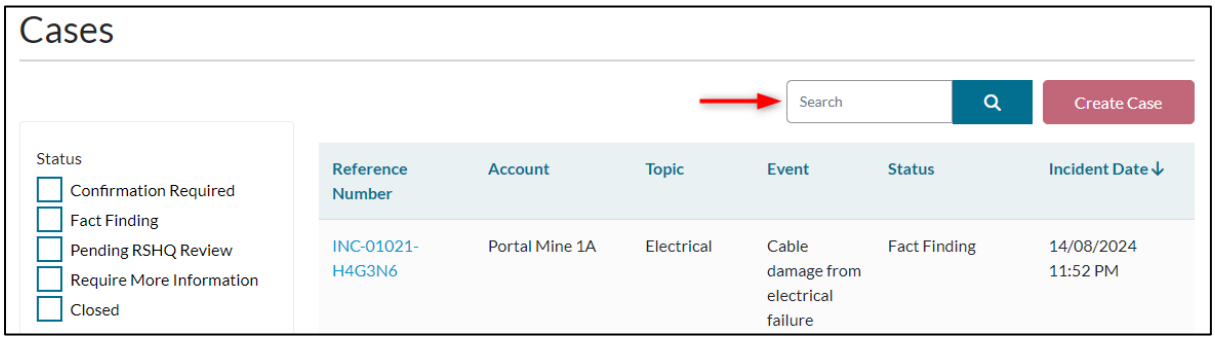
When conducting a search, it is recommended that you use the wild card (*) at the beginning and end of the string of letters. This looks for the letter string in a sentence.

Procedure

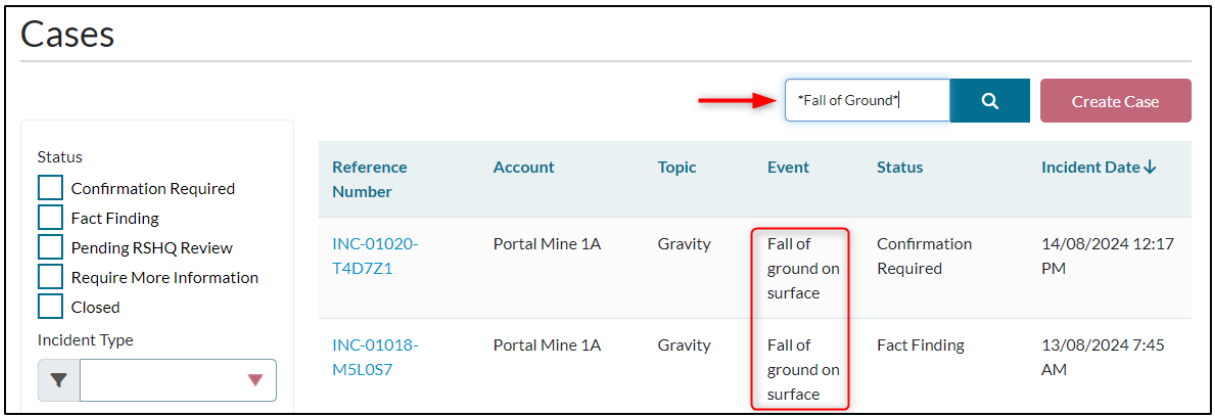
In this example, we have accessed an incident record.

1. Using the search function

   A search field appears next to the **Create Case** button.



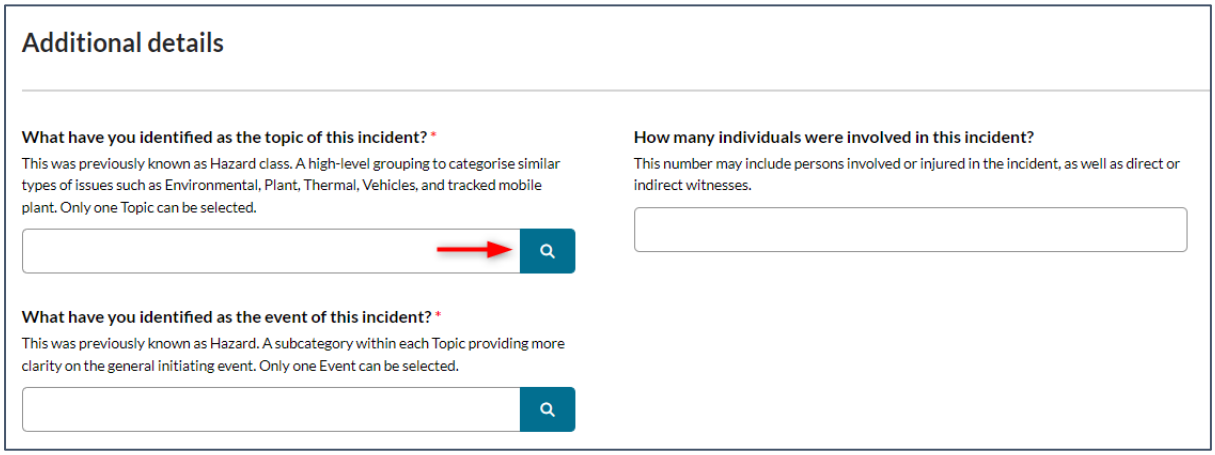
- As an example, using the * wildcard, type *Fall of Ground* into the search field and hit enter. All cases with an event type of **Fall of Ground** will be returned.



2. Using the lookup function

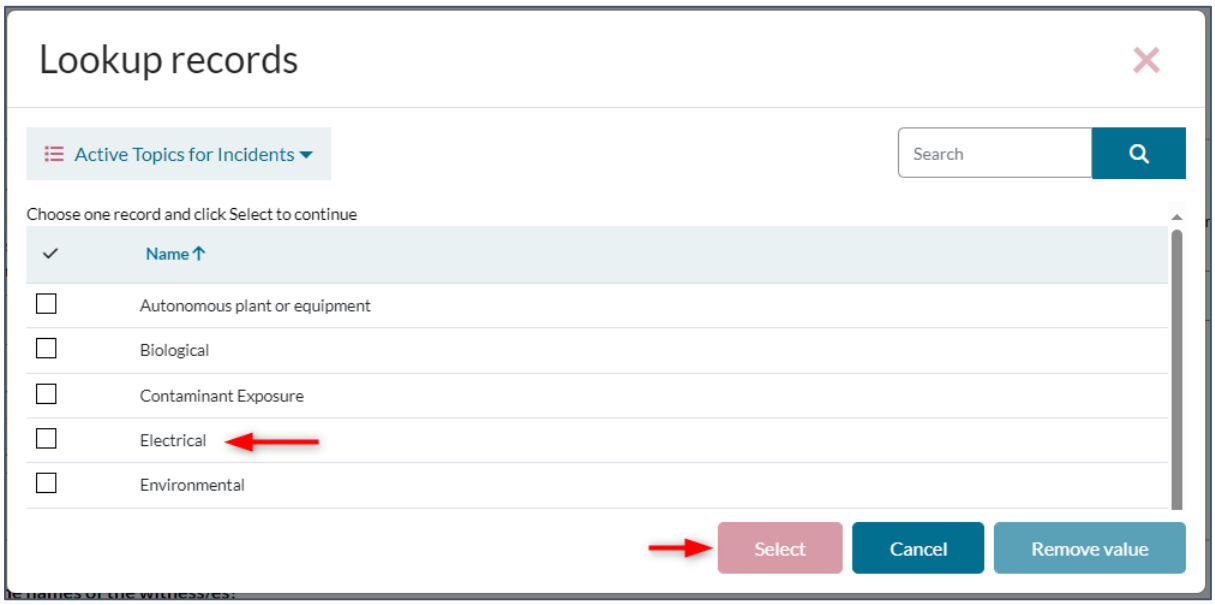
   Using the first lookup function method we will complete the **Topic** and **Event** fields at the incident **Notification** stage.

   - Click on **Create Case**.
   - Scroll down to the **Topic** and **Event** field.
   - Click on the **Topic lookup** icon to bring up the list of topics.



Option 1:

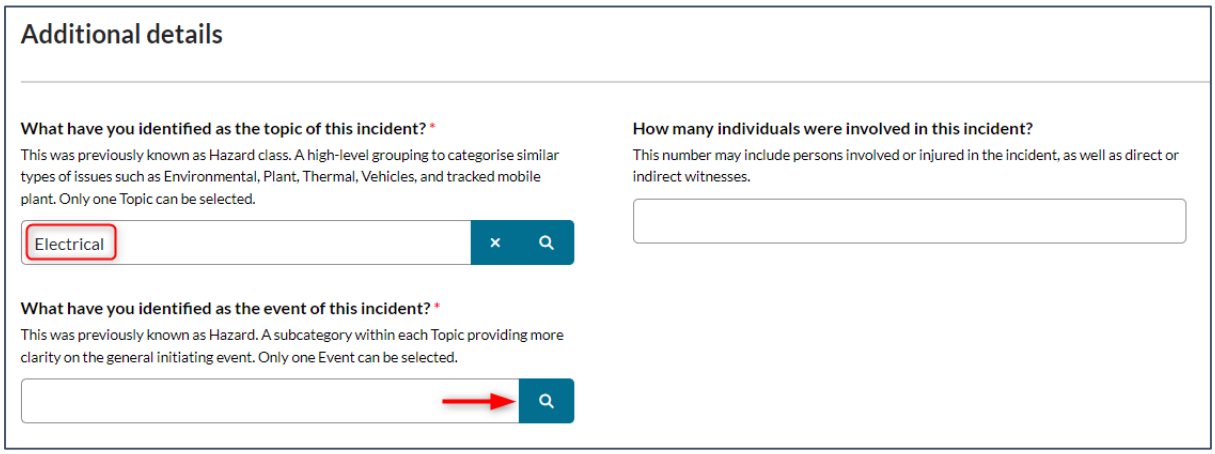
- Scroll through the list to locate your selection.
- Select the topic **Electrical** and click on the **Select** button.



Option 2:

- Using the * wildcard, type *Electrical* into the search field and hit enter to return the topic **Electrical**.
- Select the checkbox beside **Electrical** and click on the **Select** button.

- The **Topic** field will now show the topic **Electrical**.
- Click on the **Event** lookup icon.



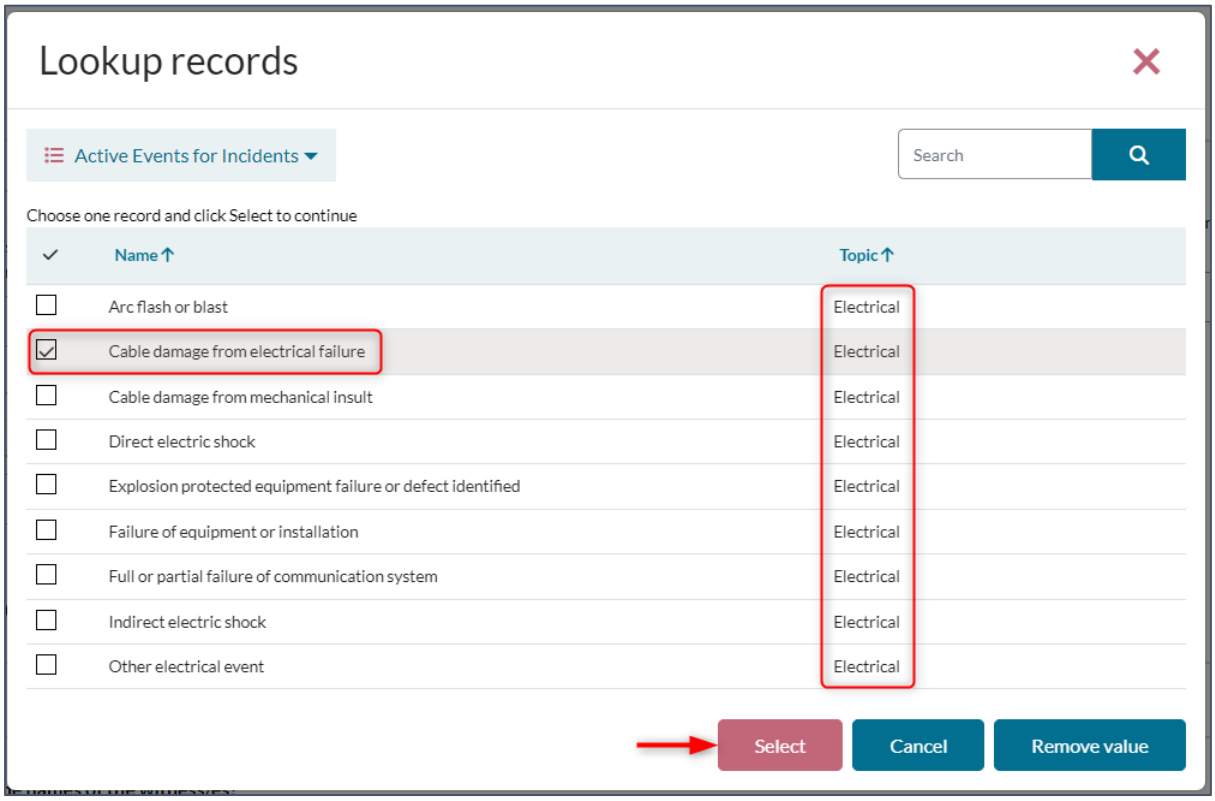
A list of events associated with the topic **Electrical** is now available for selection.

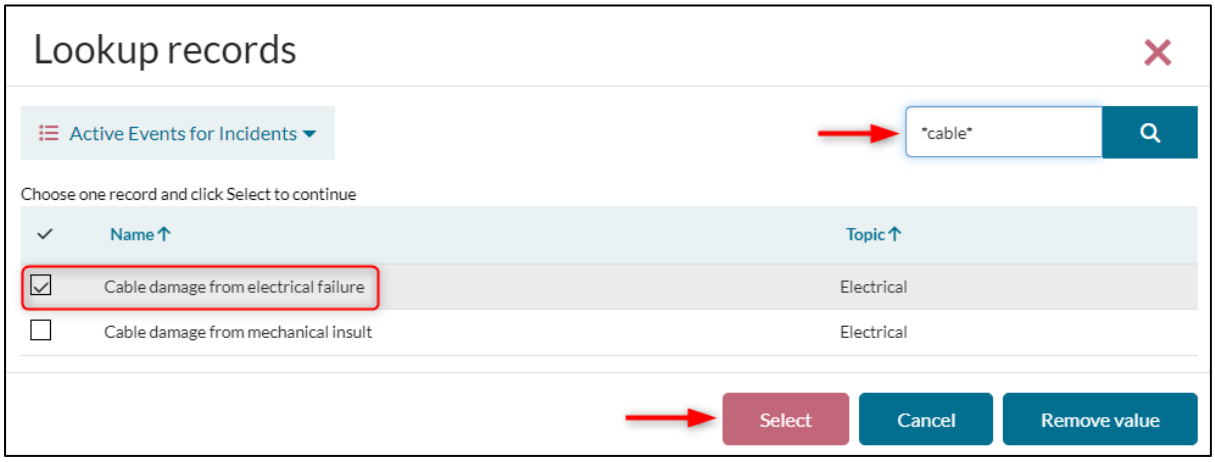
3. Searching for an **Event** based on **Topic** selection

   Values for selection are often dependent on your previous selections.

Option 1:

- Locate the event **Cable damage from Electrical failure**.
- Select the checkbox beside the event and click on the **Select** button.



Option 2:

- Use the wildcard search.