

Job Aid: Searching

Purpose

The purpose of the Searching job aid is to guide you through the step-by-step process of performing simple and advanced searches for multiple record types within the Talent Management System.

In this Job Aid, you will learn how to:

- Define Search Basics
- Create/Delete Search Filters
- Add/Remove Criterion from Search Filter
- Select from a List
- Save Your Individual Search
- Adjust the Display of Search Results
- Sort Search Results

Task A. Define Search Basics

On each search page, you will most likely see the following terms in the drop-down menu associated with most entities.

- **Exact:** If you know the precise ID of the record, select Exact from the drop-down menu and click Search.
- **Any:** Using the precise ID or description of the record, enter one or more criterion separated by a comma and click Search. For example, if searching for all user records containing the first name John or Jane, enter the exact first names separated by a comma, select Any from the drop-down menu, and click Search.
- **Starts With:** If you know the first part of an ID or description, select Starts With from the drop-down menu and type the first few letters or numbers of the record. The matching records display.
- **Contains:** If you know any part of the record, select Contains from the drop-down menu to display the matching records.
- **Is Empty:** Some entities contain the term Is Empty in the drop-down menu. This selection returns all records where the specified field is empty. For example, if searching for all users without a job position, select Is Empty from the drop-down menu for the job position criteria and click Search.

You can also choose whether or not you want your search to be case sensitive by using the Case Sensitive Search option. The Yes button is selected by default which means that the system search is case sensitive. A non-case-sensitive search may take a little longer.

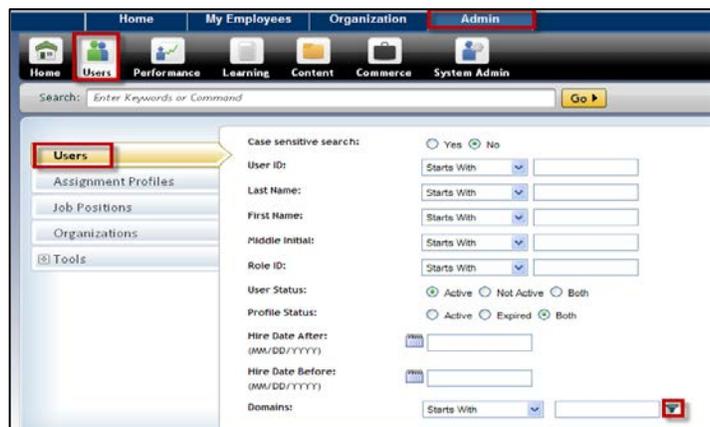
- **Search All Locales** radio buttons have been added to all search pages where data has been localized. When enabled, the search will include all locales in the keyword search; when disabled, only the admin's active locale will be searched.
- **Commonly Used Search Icons:**
 - **Calendar** picker is associated with the date field. Use it to select and populate the corresponding date field.
 - **Create Filter** button is used to find and select a corresponding entity to include in your search filter.
 - **Clear Filter** button is used to clear the content of your corresponding search filter.
 - **Select from List** button is used to find and select a corresponding entity to include in your search criteria.
 - **Clear List** button is used to clear the list of filters of selected entities in your search filter.
 - **Search** button is used to select from a list or find and select the corresponding entity using a filter.

Task B. Create/Delete Search Filters

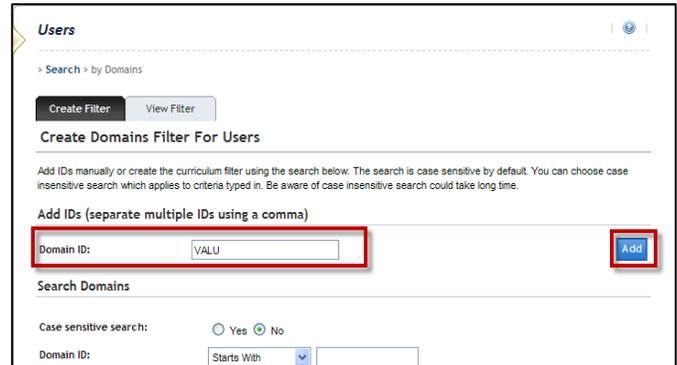
The search filter determines the contents of your result by listing only entities that satisfy all the criteria specified by your filter. For example, you may want to view only users that have a particular Domain listed. You need to specify the Domain in a filter and apply that filter to search criteria to see only those users that relate to the selected Domain.

Note: Verify that the **Admin** tab is selected.

1. Navigate to **Users > Users**.
2. To create the filter, click the **Create Filter** icon for Domain.



- Under **Add IDs**, enter the job position **Domain ID** or search for it by entering criteria.
- Click **Add**. The **View Domain Results** screen appears.



Users

> Search > by Domains

Create Filter View Filter

Create Domains Filter For Users

Add IDs manually or create the curriculum filter using the search below. The search is case sensitive by default. You can choose case insensitive search which applies to criteria typed in. Be aware of case insensitive search could take long time.

Add IDs (separate multiple IDs using a comma)

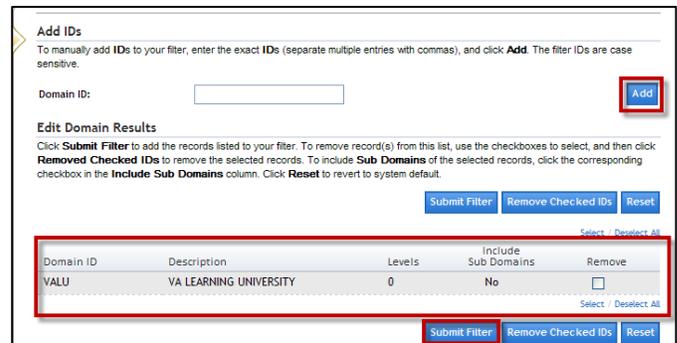
Domain ID: Add

Search Domains

Case sensitive search: Yes No

Domain ID: Starts With

- Click **Submit Filter**. You are returned to the filter screen to view the filter just created. Confirm your selection(s) are correct.



Add IDs

To manually add IDs to your filter, enter the exact IDs (separate multiple entries with commas), and click **Add**. The filter IDs are case sensitive.

Domain ID: Add

Edit Domain Results

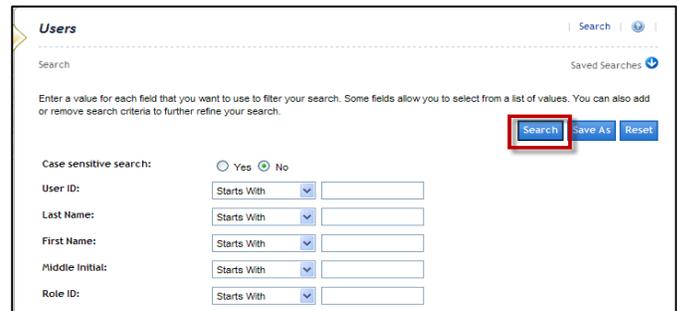
Click **Submit Filter** to add the records listed to your filter. To remove record(s) from this list, use the checkboxes to select, and then click **Removed Checked IDs** to remove the selected records. To include **Sub Domains** of the selected records, click the corresponding checkbox in the **Include Sub Domains** column. Click **Reset** to revert to system default.

Submit Filter Remove Checked IDs Reset

Domain ID	Description	Levels	Include Sub Domains	Remove
VALU	VA LEARNING UNIVERSITY	0	No	<input type="checkbox"/>

Submit Filter Remove Checked IDs Reset

- Click **Search**. The users with the specified Doman ID display.



Users

Search Saved Searches

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Search Save As Reset

Case sensitive search: Yes No

User ID: Starts With

Last Name: Starts With

First Name: Starts With

Middle Initial: Starts With

Role ID: Starts With

Task C. Add/Remove Criterion from Search Filter

Each entity in the Talent Management System has multiple attributes and you may find that some of the attributes are more useful than others in conducting searches. TMS gives you the choice to determine the attributes of the entity that you would like to use as criteria for your search. Let's now search for all users within a specific organization.

Note: Verify that the **Admin** tab is selected.

1. Navigate to **Users > Users**.
2. Click the **arrow** next to **Add/Remove Criteria**. The **Search Criteria** window displays.

The screenshot shows the TMS Admin interface. The top navigation bar includes 'Home', 'My Employees', 'Organization', and 'Admin' (selected). Below the navigation bar, there are tabs for 'Home', 'Users', 'Performance', 'Learning', 'Content', 'Commerce', and 'System Admin'. The 'Users' tab is active. A search bar is present with the text 'Enter Keywords or Command'. On the left, a sidebar menu shows 'Users', 'Assignment Profiles', 'Job Positions', 'Organizations', and 'Tools'. The main content area displays search filters for 'Users', including fields for Last Name, First Name, Middle Initial, Role ID, User Status, Profile Status, Hire Date After, Hire Date Before, and Domains. The 'Add/Remove Criteria' button is highlighted with a red box.

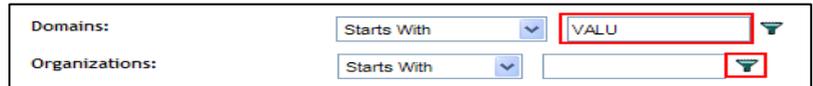
3. Click the **criteria** checkboxes to add to or remove from the Search screen.
4. Click **Submit Query**. The new criteria appear for those that you added and are removed for those you removed on the Search screen.

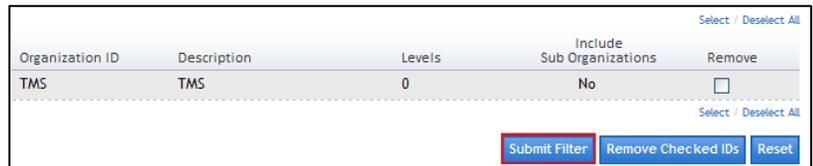
The screenshot shows the 'Search Criteria' dialog box. The title bar 'Search Criteria' is highlighted with a red box. The dialog contains a list of criteria with checkboxes: Last Name, First Name, Middle Initial, Role ID, User Status, Profile Status, Hire Date After, Employee Statuses, Employee Types, Job Locations, Job Positions, Alternate Job Positions, Assignment Profiles, Competency Profiles, Curricula, Person ID, Employee Number, Business Line, Sub Account Code, NTLOGON, Occupational Category, Exclude from EHRI, and Cost Center. The 'Submit Query' button is highlighted with a red box.

Task D. Select from a List

The Talent Management System has a number of reference lists that you can select from without creating and submitting a filter. Review the list, and check the objects you want to use in your search filter. Let's continue to use our example of searching for users. We now want to search for users within the EHS organization who have an employee status of part-time.

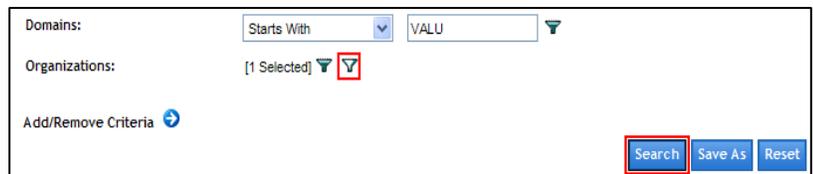
1. In the **Domains** textbox, type **VALU** on the Add/Remove Criteria screen.
2. Next to the **Organizations** field, click the **Filter** icon.
3. Type **TMS** in the **Organization ID** text box.
4. Click **Add**. The selection has been added to the search filter. Review the filter for accuracy.
5. Click **Submit Filter** to continue.





Organization ID	Description	Levels	Include Sub Organizations	Remove
TMS	TMS	0	No	<input type="checkbox"/>

6. Now that a criterion is selected, click **Search** to view results.
Note: To clear the list of selected entities, click the **Clear List** icon.



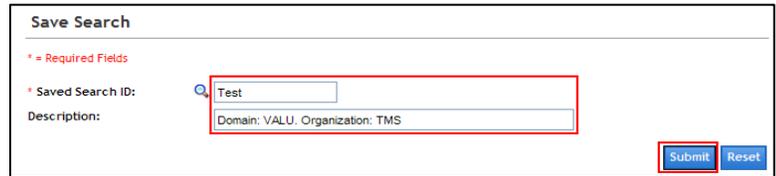
Task E. Save Your Individual Search

You can save a search filter and reuse the criteria specified in the search later. The search filter is individual-based and available only to your login. Continuing with the Screen from Task D Step 6:

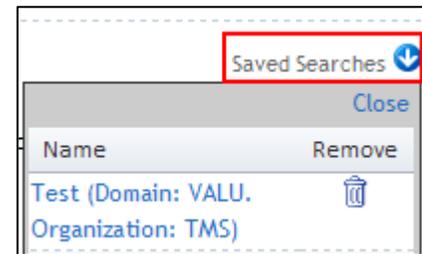
1. Click **Save As** once the search criteria have been defined. The system prompts you for an ID for your saved search and a brief description of the search.



2. Enter an ID in the **Saved Search ID** text box.
3. Enter an intuitive description in the **Description** text box.
4. Click **Submit**.



5. Next time you want to use this exact search, click the **Saved Searches** icon on the search page and select the search name you wish to conduct.
Note: If you select a saved search, the search ID and description appear at the top of the page.

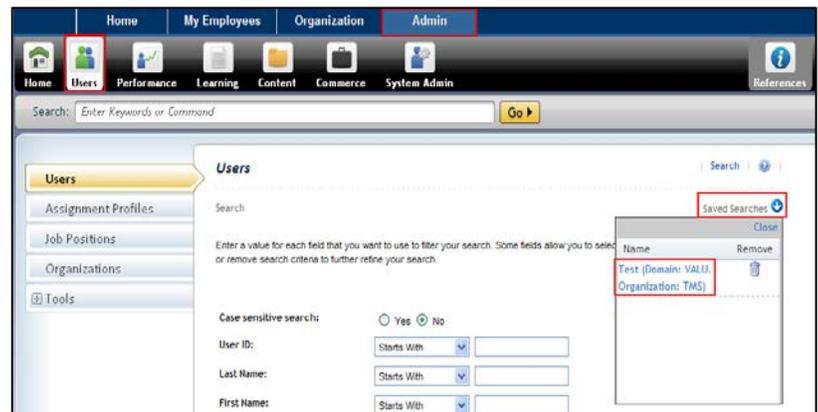


Task F. Adjust the Display of Search Results

Your search result is the set of related entities that fit the search criteria you specified. You may, however, choose to review the results by specific fields not based on all of the attributes of the search result.

Note: Verify that the **Admin** tab is selected.

1. Navigate to **Users > Users**.
2. Click the **Saved Searches** icon.
3. Click **Search**.
4. Click the **Field Chooser** icon above the search results list to determine which attributes of the listed entities that you want and in which column.





- Select the attribute that you want to display. In this example, enter 5 for the Organization ID field to appear in the fifth column.
- Click **Submit**.
Note: The column number is sequential (i.e. 1, 2, 3,).

1	User ID	<input type="checkbox"/>	Active	<input type="checkbox"/>	Terminated
2	Emp Type	<input type="checkbox"/>	Address	<input type="checkbox"/>	Email Address
3	Domain ID	<input type="checkbox"/>	City	<input type="checkbox"/>	Has Access
4	User Name	<input type="checkbox"/>	State / Province	<input type="checkbox"/>	Locked
	<input type="checkbox"/> Emp Status	<input type="checkbox"/>	Postal Code	<input type="checkbox"/>	Region ID
	<input type="checkbox"/> Job Location	<input type="checkbox"/>	Country	<input type="checkbox"/>	Role ID
	<input type="checkbox"/> Job Position	<input type="checkbox"/>	Supervisor	<input type="checkbox"/>	Profile Status
5	Organization ID	<input type="checkbox"/>	Hire Date	<input type="checkbox"/>	Station ID

Submit

- View the new fields added to the search results.

User ID	Emp Type	Domain ID	User Name	Organization ID	Notify
DAI_USER_02		VALU	USER_02, DAI	TMS	<input type="checkbox"/>
DAI_USER_03		VALU	USER_02, DAI	TMS	<input type="checkbox"/>

Task G. Sort Search Results

Talent Profile: Accessing

Once you have the results you are looking for, you can sort it based on key columns in your list (except the Description column/field). Continue with the same screen from Task F Step 7.

- To sort the list by an entity, simply find the column and click the header: an **up** arrow head indicates ascending order, A > Z; and a **down** arrow head indicates descending order, Z > A.

User ID	Emp Type	Domain ID	User Name	Organization ID	Notify
DAI_USER_02		VALU	USER_02, DAI	TMS	<input type="checkbox"/>
DAI_USER_03		VALU	USER_02, DAI	TMS	<input type="checkbox"/>