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.

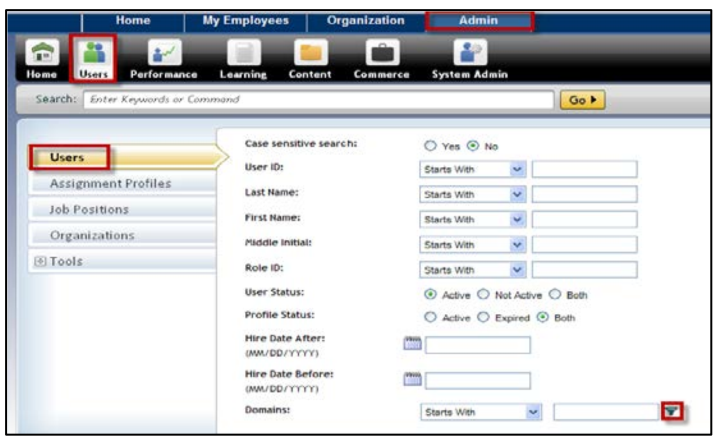
- **Commonly Used Search Icons:**
  - **Calendar** picker is associated with the date field. Use it to select and populate the corresponding date field.
  - **Create Filter** button is used to find and select a corresponding entity to include in your search filter.
  - **Clear Filter** button is used 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

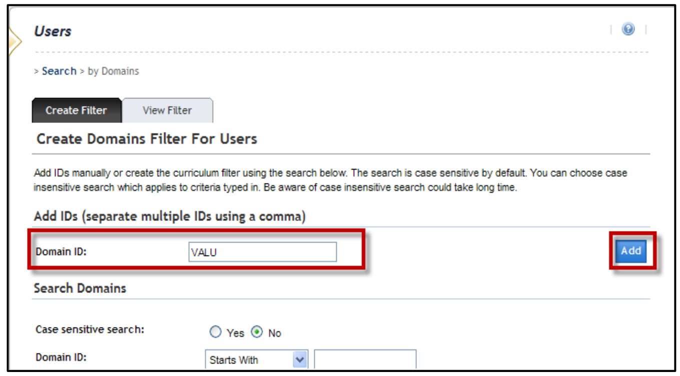
The search filter determines the contents of your result by listing only entities that satisfy all the criteria specified by your filter. For example, you may want to view only users that have a particular Domain listed. You need to specify the Domain in a filter and apply that filter to search criteria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

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

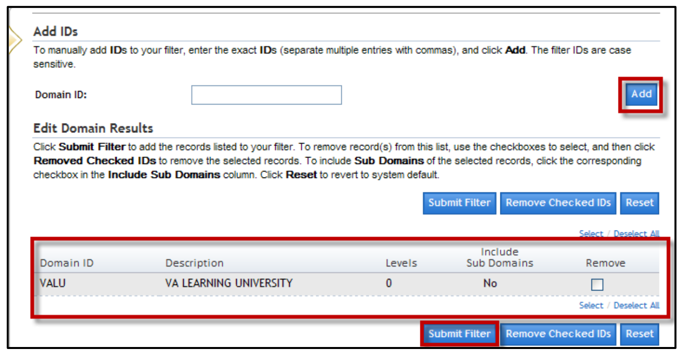
1. Navigate to **Users > Users**.
2. To create the filter, click the **Create Filter** icon for Domain.



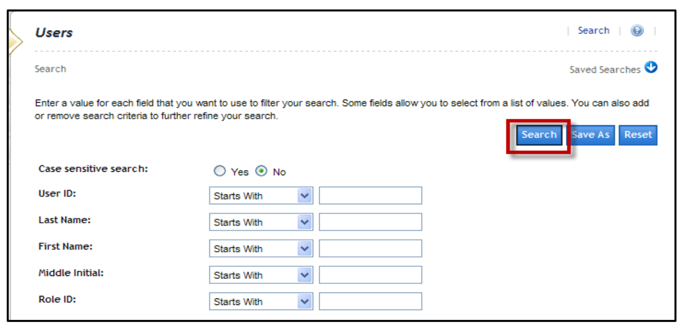
3. Under **Add IDs,** enter the job position **Domain ID** or search for it by entering criteria.
4. Click **Add**. The **View Domain Results** screen appears.



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



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

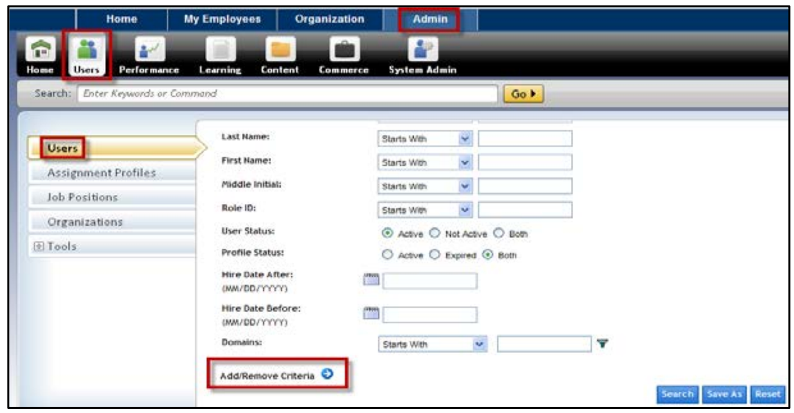


Task C. Add/Remove Criterion from Search Filter

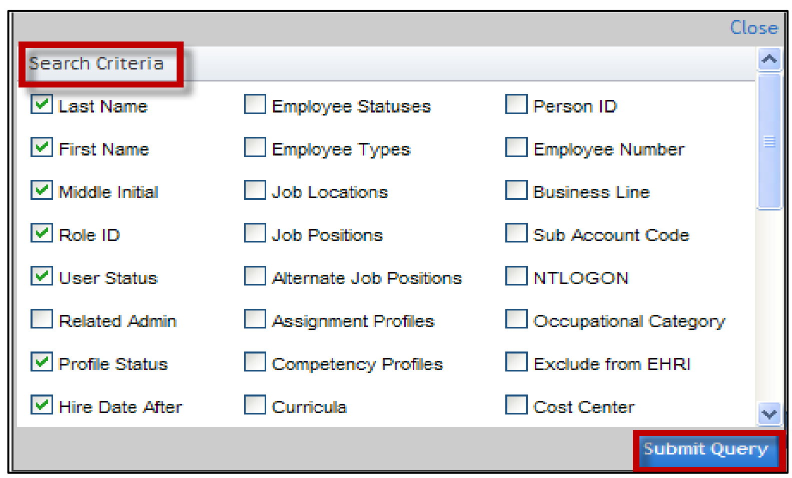
Each entity in the Talent Management System has multiple attributes and you may find that some of the attributes are more useful than others in conducting searches. TMS gives you the choice to determine the attributes of the entity that you would like to use as criteria for your search. Let's now search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



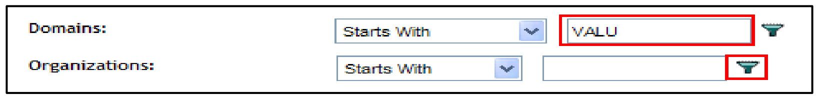
3. Click the **criteria** checkboxes to add to or remove from the Search screen.
4. Click **Submit Query**. The new criteria appear for those that you added and are removed for those you removed on the Search screen.



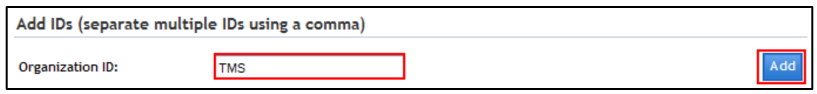
Task D. Select from a List

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.

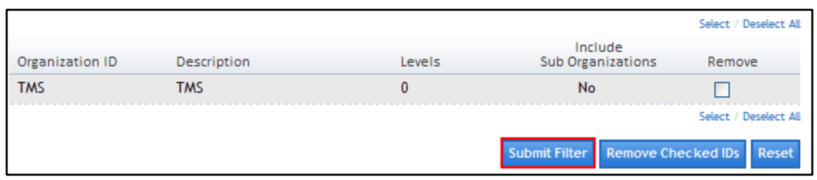
1. In the **Domains** textbox, type **VALU** on the Add/Remove Criteria screen.
2. Next to the **Organizations** field, click the **Filter** icon.



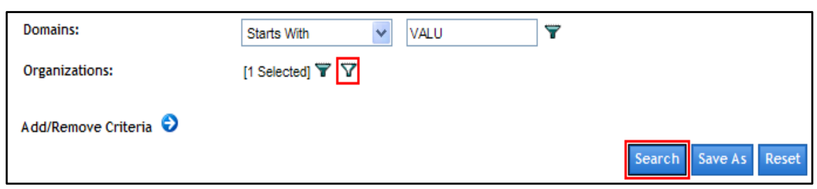
3. Type **TMS** in the **Organization ID** text box.
4. Click **Add**. The selection has been added to the search filter. Review the filter for accuracy.



5. Click **Submit Filter** to continue.



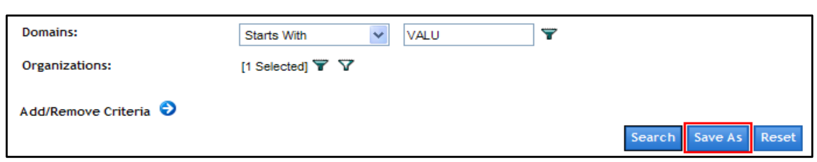
6. Now that a criterion is selected, click **Search** to view results.
   Note: To clear the list of selected entities, click the **Clear List i**con.



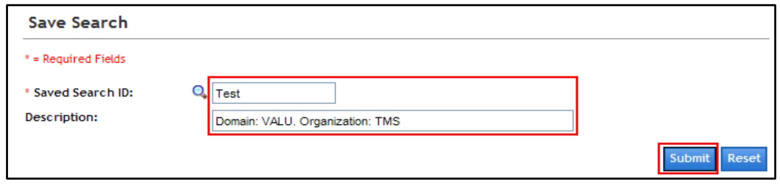
Task E. Save Your Individual Search

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:

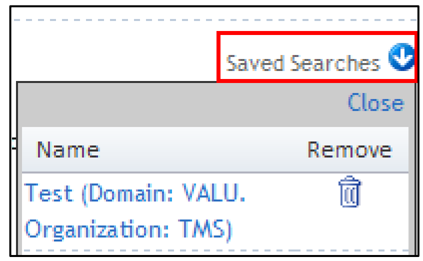
1. Click **Save As** once the search criteria have been defined. The system prompts you for an ID for your saved search and a brief description of the search.



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.

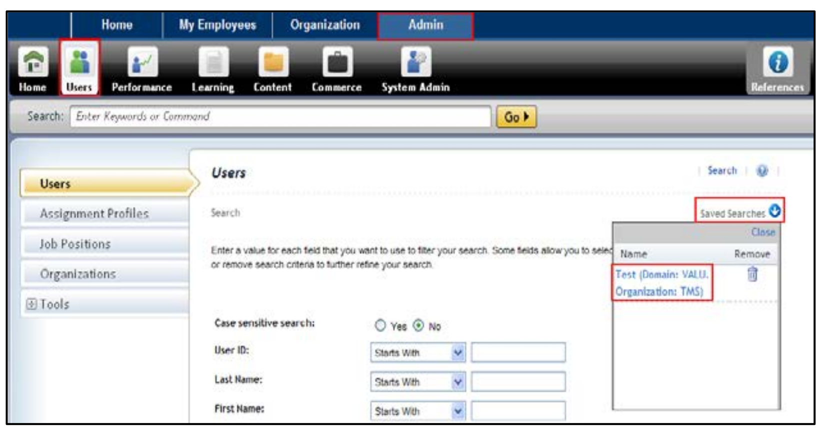


Task F. Adjust the Display of Search Results

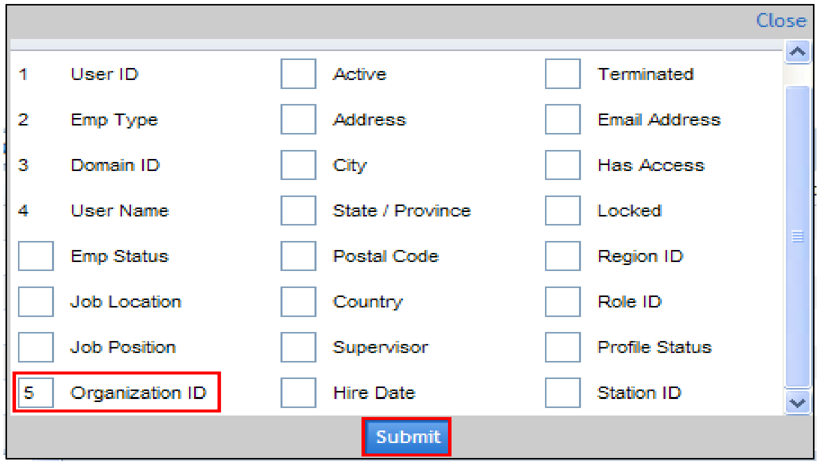
Your search result is the set of related entities that fit the search criteria you specified. You may, however, choose to review the results by specific fields not based on all of the attributes of the search result.

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

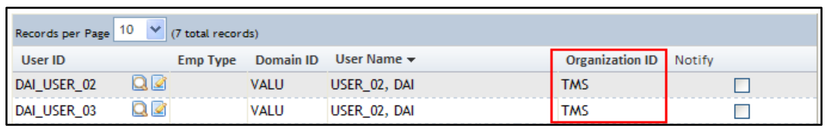
1. Navigate to **Users > Users**.
2. Click the **Saved Searches** icon.
3. Click **Search.**
4. Click the **Field Chooser** icon above the search results list to determine which attributes of the listed entities that you want and in which column.



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



7. View the new fields added to the search results.



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.

1. 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.