

Job Aid: Searching

Description

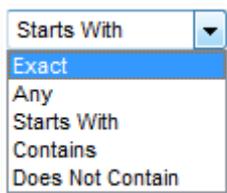
The purpose of this job aid is to guide administrators through the step-by-step process of performing simple and advanced searches for multiple record types within Talent Management System.

Tasks

- A. Search Basics
- B. Create/Delete Search Filter
- C. Add/Remove Criterion from Search Filter
- D. Select from a List
- E. Save Your Individual Search
- F. Adjust Display of Search Results
- G. Sort Search Results
- H. Downloading Search Results

Task A. 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**.

First Name:	<input type="text" value="Any"/>	<input type="text" value="Jane, John"/>
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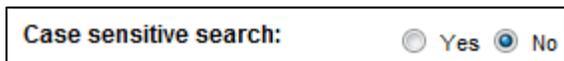
Starts With: If you know the first part of an ID or description, select **Starts With** from the drop-down menu and type the first few letters or numbers of the record. The matching records display.

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 will 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 an employee type, select **Is Empty** from the drop-down menu for the employee types 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

Icon	Description
	The Calendar picker is associated with the date field. Use it to select and populate the corresponding date field.
	Click the Create Filter button to find and select a corresponding entity to include in your search filter.
	Click the Clear Filter button to clear the content of your corresponding search filter.

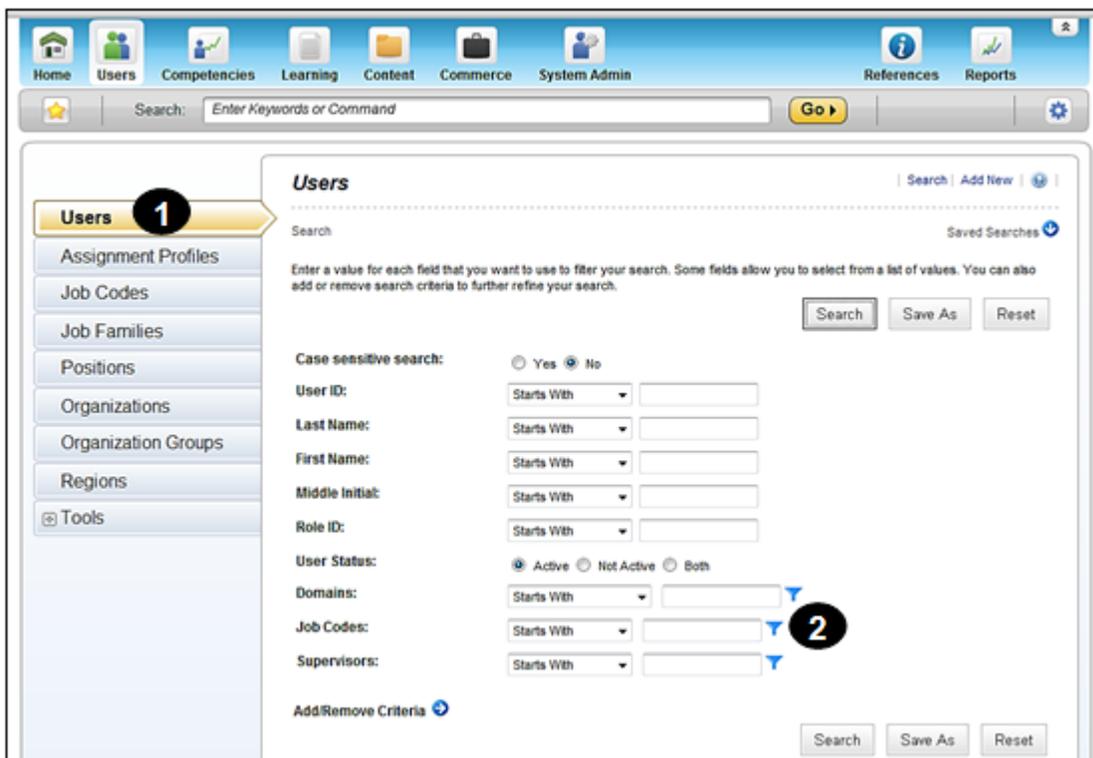


-  Click the **Select from List** button to find and select a corresponding entity to include in your search criteria.
-  Click the **Clear List** button to clear the list of filters of selected entities in your search filter.
-  Click the **Search** button to select from a list or find and select the 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 list only users that have a particular job code assigned. You need to specify the job code in a filter and apply that filter to search criteria to see only those users that relate to the selected job code.

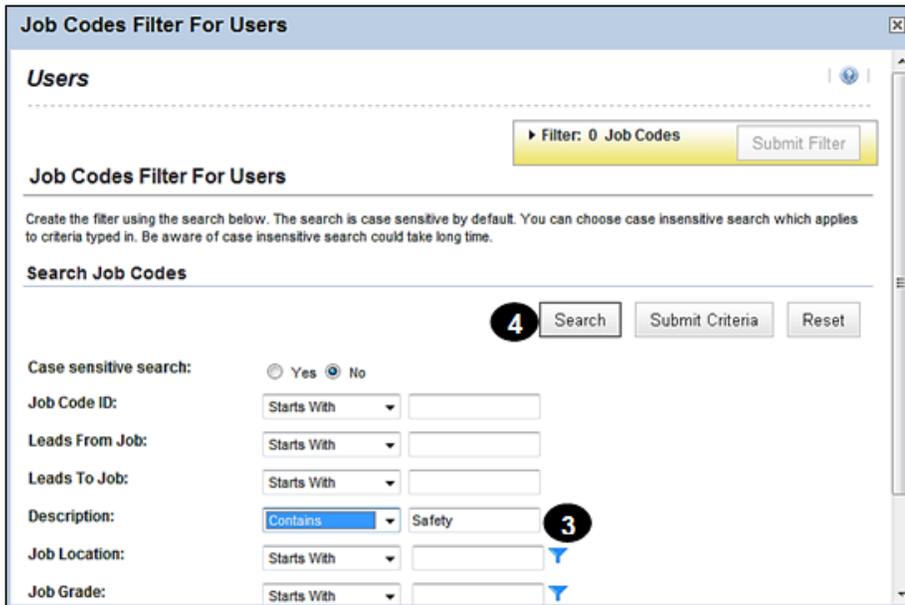
1. Navigate to **Users > Users**.
2. To create the filter, click the **Create Filter** icon () for Job Codes.



3. If you don't know the Job Code ID exactly, search for it by entering criteria. In this example, let's search for Job Codes that contain the word *Safety* in the description.

4. Click **Search**.

Note: The yellow box at the top right indicates how many job codes have been added to this filter. Currently there are zero.



Job Codes Filter For Users

Users

Filter: 0 Job Codes Submit Filter

Job Codes Filter For Users

Create the 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.

Search Job Codes

4 Search Submit Criteria Reset

Case sensitive search: Yes No

Job Code ID: Starts With []

Leads From Job: Starts With []

Leads To Job: Starts With []

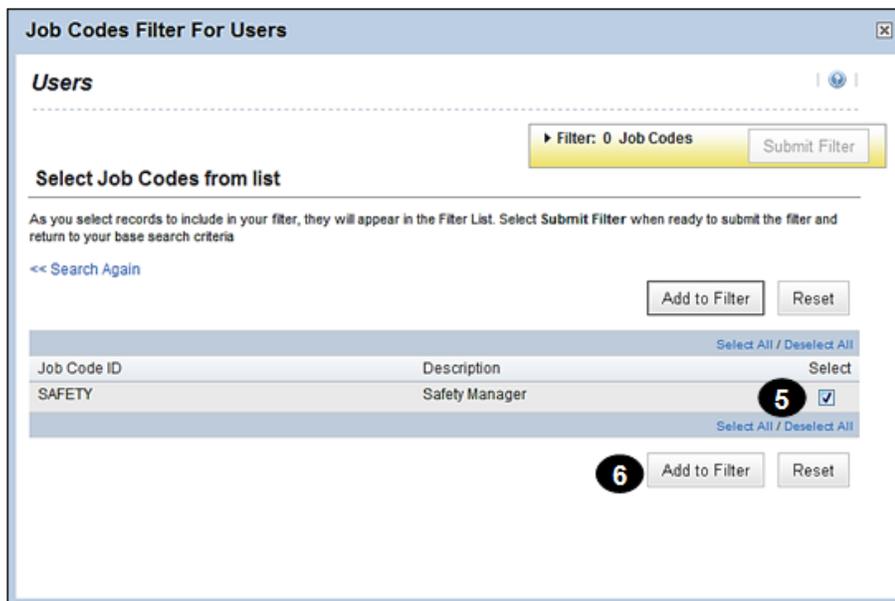
Description: Contains Safety 3

Job Location: Starts With []

Job Grade: Starts With []

5. Select one or more job code checkboxes.

6. Click **Add to Filter**.



Job Codes Filter For Users

Users

Filter: 0 Job Codes Submit Filter

Select Job Codes from list

As you select records to include in your filter, they will appear in the Filter List. Select **Submit Filter** when ready to submit the filter and return to your base search criteria

<< Search Again

Add to Filter Reset

Job Code ID	Description	Select
SAFETY	Safety Manager	5 <input checked="" type="checkbox"/>

Select All / Deselect All

6 Add to Filter Reset

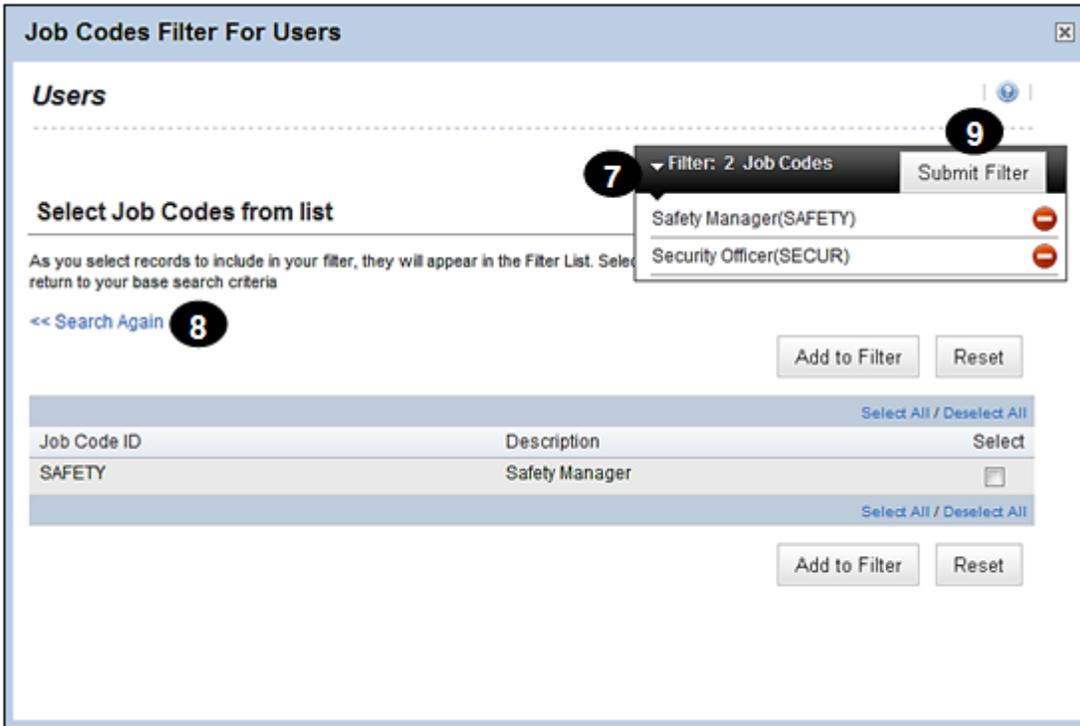
The yellow filter box on the top right now shows two job codes added to the filter.

7. Click the arrow (▾) to expand/contract the list of job codes added to the filter.

8. Click **Search Again** to add additional job codes to the filter.

or

9. Click **Submit Filter**.



Job Codes Filter For Users

Users

Filter: 2 Job Codes **9** Submit Filter **7**

Select Job Codes from list

As you select records to include in your filter, they will appear in the Filter List. Select return to your base search criteria

<< Search Again **8**

Add to Filter Reset

Job Code ID	Description	Select
SAFETY	Safety Manager	<input type="checkbox"/>

Select All / Deselect All

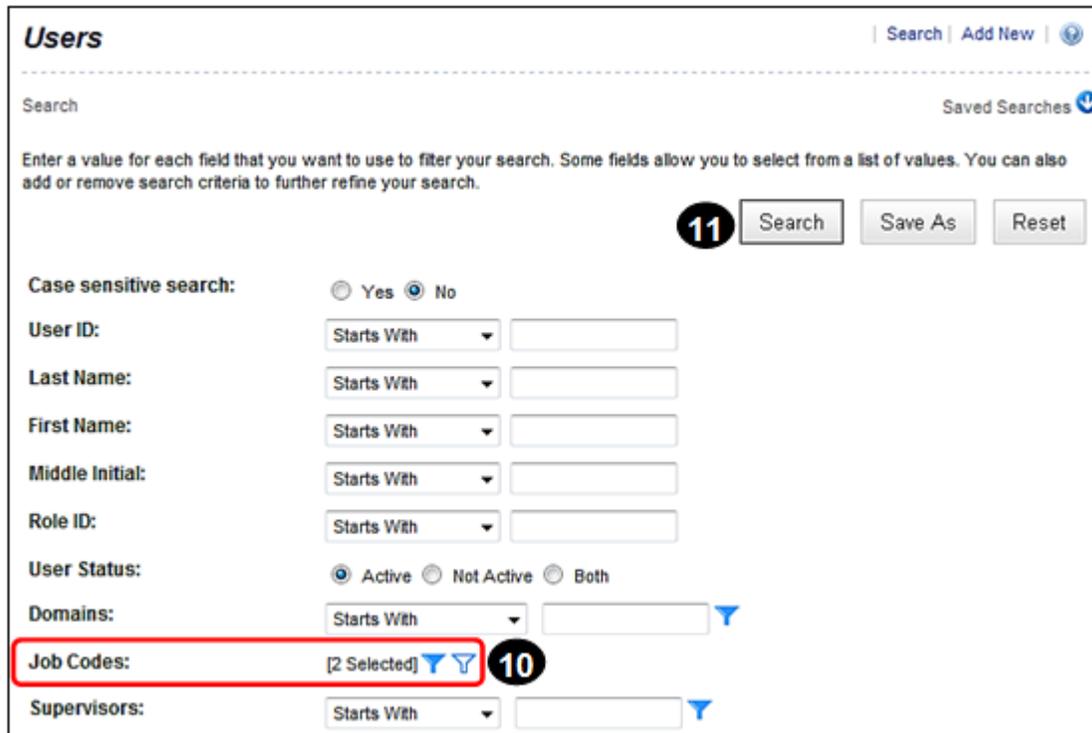
Add to Filter Reset

If you submit the filter, you are returned to your original search screen.

In this example you now see that the job code attribute has two (2) criteria selected for this filter.

10. You can modify this filter by clicking the **Filter by Criteria** icon (⌵), or you can clear the filter by clicking the **Clear Filter** icon (⌵).

11. Click **Search** to view results.



Users | Search | Add New | 

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.

11 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

User Status: Active Not Active Both

Domains: Starts With 

Job Codes: [2 Selected]   **10**

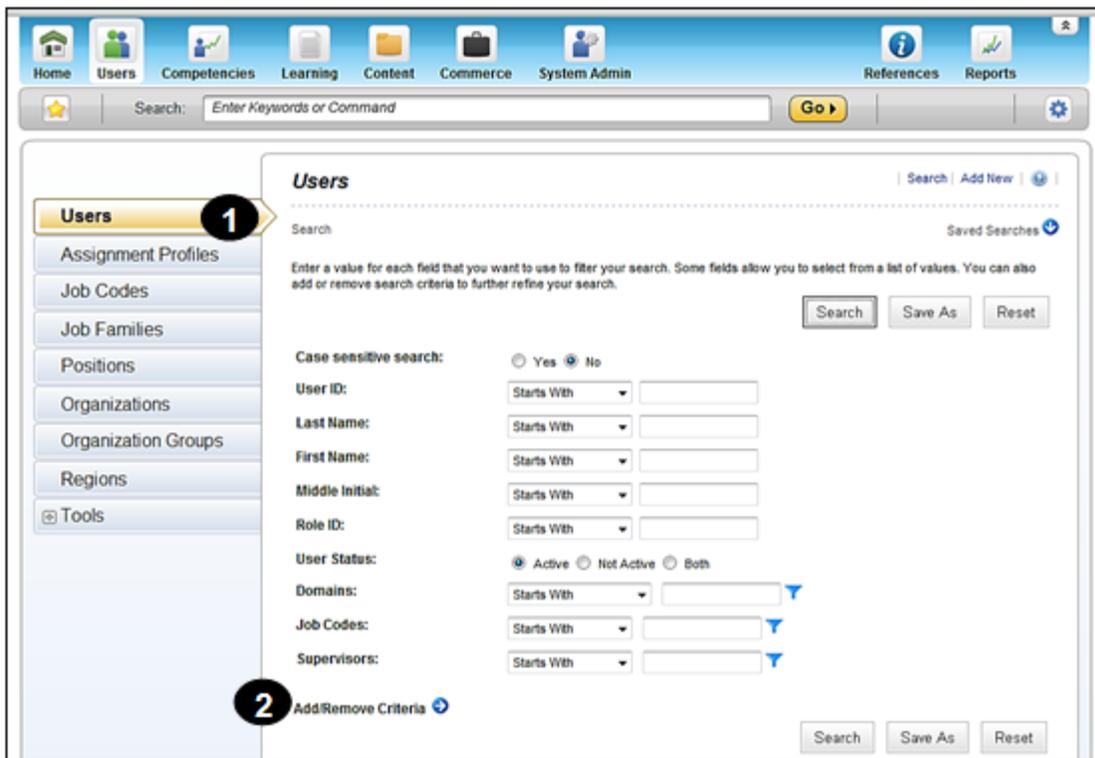
Supervisors: Starts With 

Add/Remove Criterion from Search Filter

Each entity in Talent Management System has multiple attributes and you may find that some of the attributes are more useful than others in conducting searches. Talent Management System 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.

1. Navigate to **Users > Users**.
2. Click the **Add/Remove Criteria** icon (↔).



The screenshot displays the Talent Management System interface. At the top, there is a navigation bar with icons for Home, Users, Competencies, Learning, Content, Commerce, System Admin, References, and Reports. Below this is a search bar with the placeholder text "Enter Keywords or Command" and a "Go" button. The main content area is titled "Users" and includes a search section with a "Search" button, a "Save As" button, and a "Reset" button. The search criteria are listed as follows:

- 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 []
- User Status: Active Not Active Both
- Domains: Starts With []
- Job Codes: Starts With []
- Supervisors: Starts With []

At the bottom of the search filters, there is a circled "2" pointing to the "Add/Remove Criteria" icon (↔).

3. Select the criteria check box(es) to add to the search screen. Note: The options that appear on your screen may differ from this screen shot.

4. Click **Select**.

The new criteria appear on the search screen.

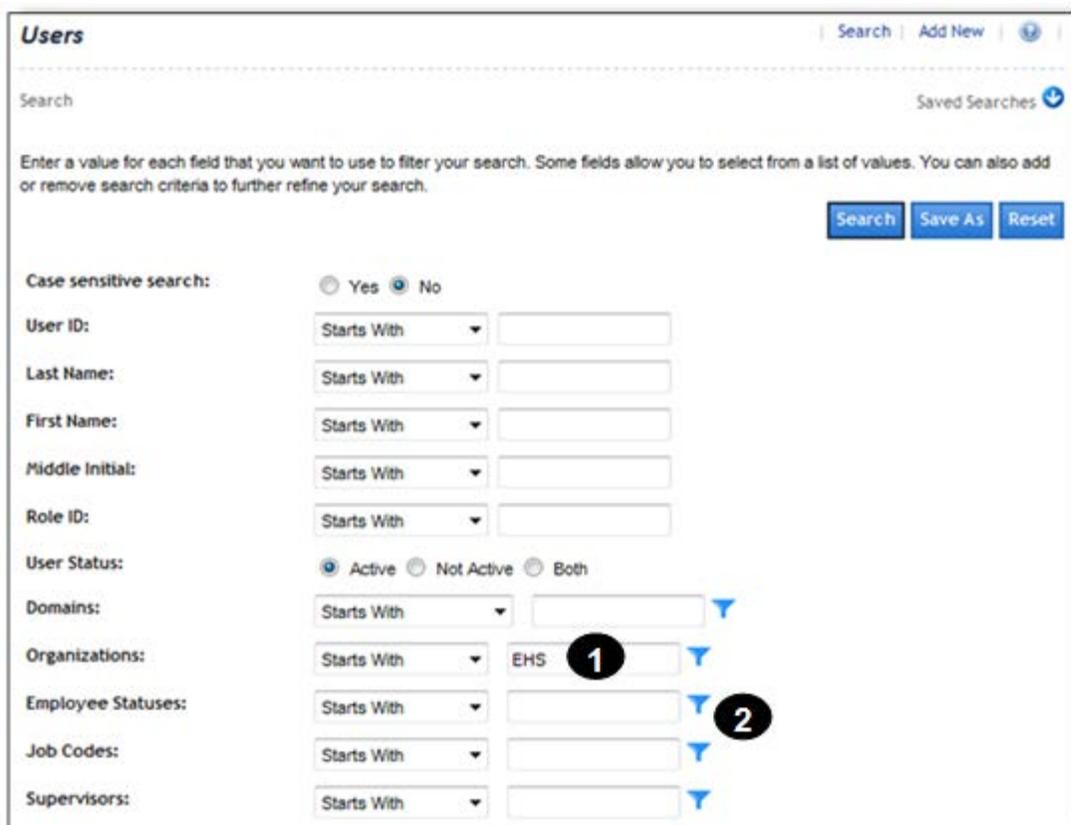
Task C. Select from a List

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 (for example) who have an employee status of part-time.

1. In the Organizations textbox, type the name of the organization on which you wish to search. In this example we are using **EHS**.
2. Next to the Employee Statuses field, click the **Filter** icon (▼).

Note: If either of the above criteria are not listed, use the Add/Remove Criteria button.



Users | Search | Add New | 

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

User Status: Active Not Active Both

Domains: Starts With 

Organizations: Starts With **1** 

Employee Statuses: Starts With  **2**

Job Codes: Starts With 

Supervisors: Starts With 

You see a list from which you can select one or more objects to populate the related field.

Note: The yellow box at the top right indicates how many job codes have been added to this filter. Currently there are zero.

3. Select the checkbox(es) for the record(s) to be selected.
4. Click Add to Filter.

Users

Filter: 0 Employee Status Submit Filter

Select Employee Status from list

As you select records to include in your filter, they will appear in the Filter List. Select Submit Filter when ready to submit the filter and return to your base search criteria

<< Search Again

Add to Filter Reset

Employee Status ID	Description	Select
ACT	Active	<input type="checkbox"/>
FT	Full Time	<input type="checkbox"/>
LEAVE	Temporary Leave	<input type="checkbox"/>
PT	Part Time	<input checked="" type="checkbox"/>
RET	Retired	<input type="checkbox"/>
TEMP	Temporary	<input type="checkbox"/>

Records per Page: 25 (6 total records) Select All / Deselect All

The yellow filter box on the top right now shows the added criteria to the filter.

5. Click the arrow (▾) to expand/contract the list of criteria added to the filter.
 6. Click Search Again to add additional job codes to the filter.
- or
7. Click Submit Filter.

Users

Filter: 1 Employee Status Submit Filter

Part Time(PT)

Select Employee Status from list

As you select records to include in your filter, they will appear in the Filter List. Select Submit Filter when ready to submit the filter and return to your base search criteria

<< Search Again

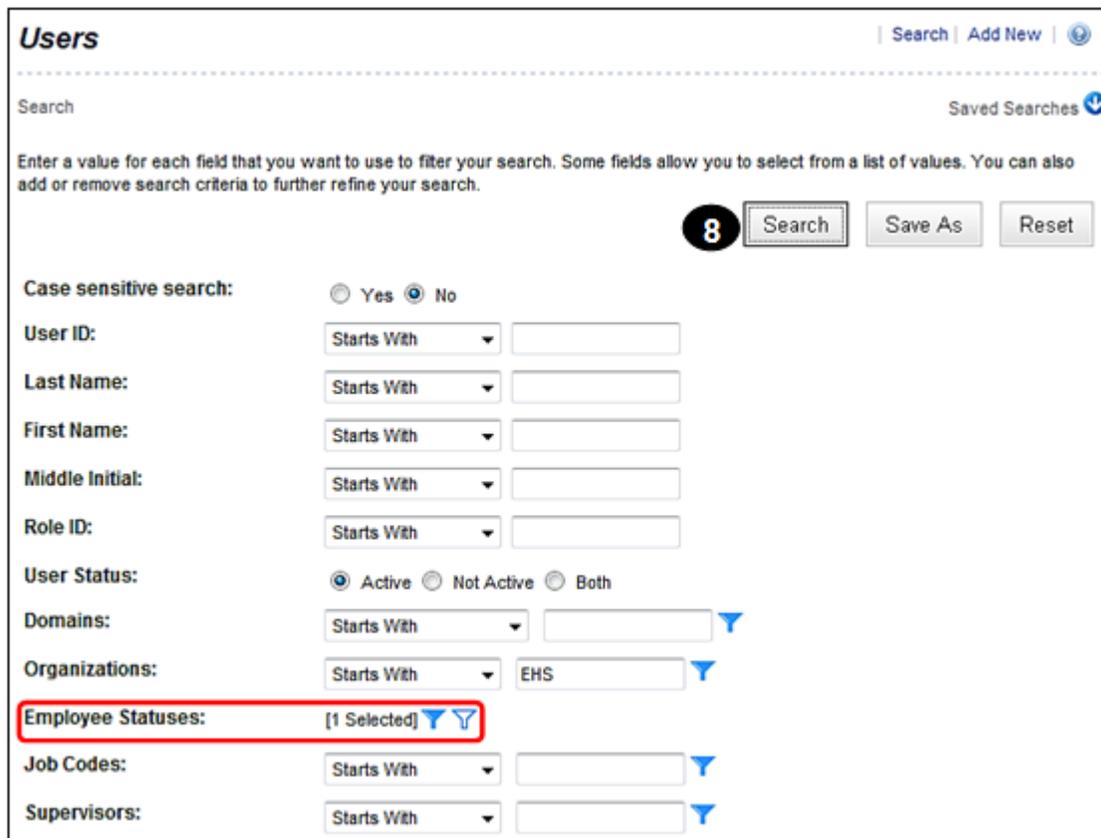
Add to Filter Reset

Employee Status ID	Description	Select
ACT	Active	<input type="checkbox"/>
FT	Full Time	<input type="checkbox"/>
LEAVE	Temporary Leave	<input type="checkbox"/>
PT	Part Time	<input checked="" type="checkbox"/>
RET	Retired	<input type="checkbox"/>
TEMP	Temporary	<input type="checkbox"/>

Records per Page: 25 (6 total records) Select All / Deselect All

8. Now that a criterion is selected, click **Search** to view results.

Note: To clear the list of selected entities, click the Clear List icon (🗑).



Users | Search | Add New | 

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.

8 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

User Status: Active Not Active Both

Domains: Starts With 

Organizations: Starts With EHS 

Employee Statuses: [1 Selected]  

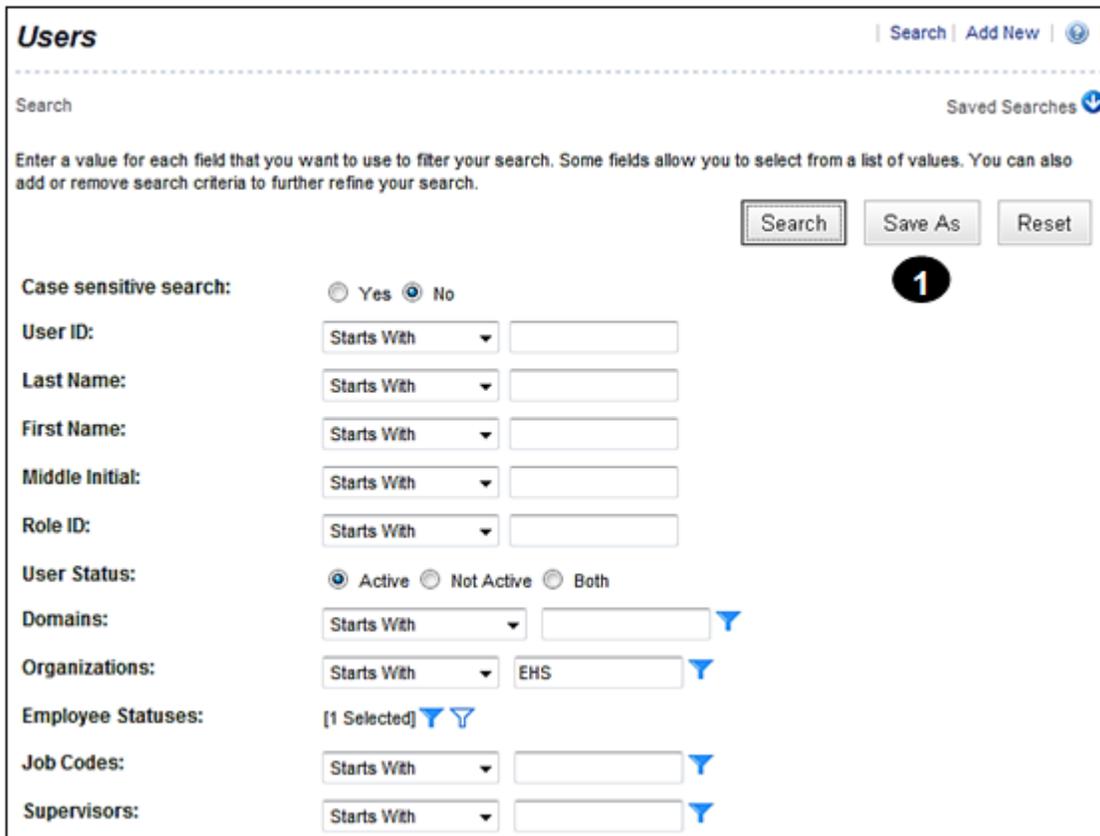
Job Codes: Starts With 

Supervisors: Starts With 

Task D. 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.

1. Click **Save As** once the search criteria have been defined.



Users | Search | Add New | 

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.

Case sensitive search: Yes No **1**

User ID: Starts With

Last Name: Starts With

First Name: Starts With

Middle Initial: Starts With

Role ID: Starts With

User Status: Active Not Active Both

Domains: Starts With 

Organizations: Starts With 

Employee Statuses: [1 Selected]  

Job Codes: Starts With 

Supervisors: Starts With 

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 textbox.
3. Enter an intuitive description in the Description textbox.
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.

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.

1. 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.

Field Chooser
1

[Download Search Results](#)

[Select All / Deselect All](#)

Records per Page
25
(13 total records)

	User ID	User Name ▲	Notify
☆	DAPWATSON	Watson, Damian P	<input type="checkbox"/>
☆	CRWTRAINHAM	Trainham, Crista W	<input type="checkbox"/>
☆	CHSMITH	Smith, Christopher	<input type="checkbox"/>
☆	CODSMITH	Smith, Conor D	<input type="checkbox"/>
☆	CLVROSSIN	Rossin, Claire V	<input type="checkbox"/>
☆	CHROGERS	Rogers, Christopher	<input type="checkbox"/>
☆	DAMLANGFORD	Langford, David M	<input type="checkbox"/>
☆	CHAJ	J, Cherie A	<input type="checkbox"/>
☆	DAAHYE	Hye, David A	<input type="checkbox"/>
☆	DAJHENDRICKS	Hendricks, Darren J	<input type="checkbox"/>
☆	COPHANNIGAN	Hannigan, Connor P	<input type="checkbox"/>
☆	COLBRUCATO	Brucato, Courtney L	<input type="checkbox"/>
☆	DAEBESSOM	Bessom, David E	<input type="checkbox"/>

Records per Page
25
(13 total records)

2. Select the attribute that you want to display. In this example, let's show the job location in the third column and the organization ID field in the fourth column.

3. Click **Submit**.

Close

<input type="checkbox"/>	User Name	<input type="checkbox"/>	City	<input type="checkbox"/>	Locked
<input type="checkbox"/>	Emp Status	<input type="checkbox"/>	State / Province	<input type="checkbox"/>	Region ID
<input type="checkbox"/>	Emp Type	<input type="checkbox"/>	Postal Code	<input type="checkbox"/>	Role ID
<input checked="" type="checkbox"/>	Job Location	<input type="checkbox"/>	Country	<input type="checkbox"/>	Profile Status
<input type="checkbox"/>	Job Code	<input type="checkbox"/>	Supervisor	<input type="checkbox"/>	Position ID
<input type="checkbox"/>	Domain ID	<input type="checkbox"/>	Hire Date	<input type="checkbox"/>	Is Full-Time
<input checked="" type="checkbox"/>	Organization ID	<input type="checkbox"/>	Terminated	<input type="checkbox"/>	Native Deeplink User
<input type="checkbox"/>	Active	<input type="checkbox"/>	Email Address	<input type="checkbox"/>	Regular/Temp

3 Submit

4. The new fields are added to the search results columns.

Note: The column number is sequential (i.e., 1, 2, 3, 4).

Field Chooser Download Search Results

Send Notification

Select All / Deselect All

Records per Page: 25 (13 total records)

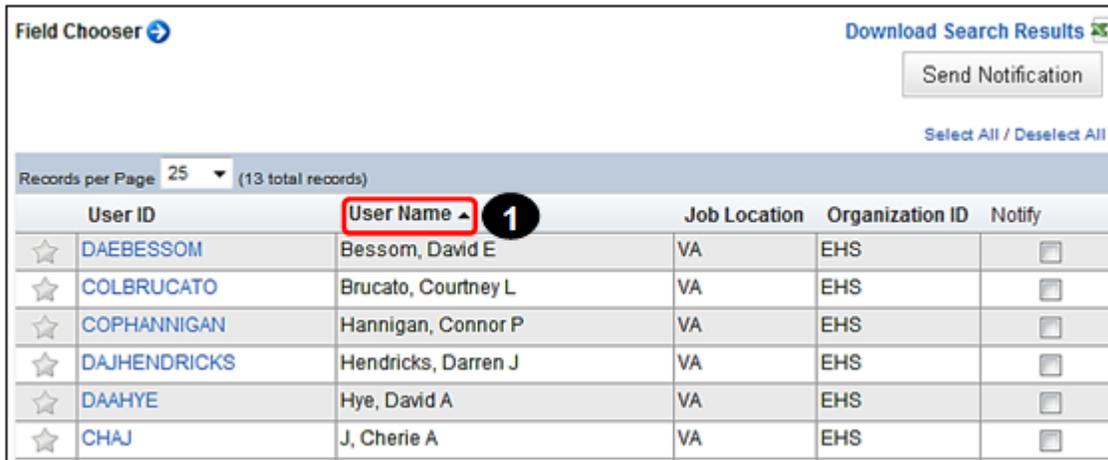
4

User ID	User Name	Job Location	Organization ID	Notify
DAEBESSOM	Bessom, David E	VA	EHS	<input type="checkbox"/>
COLBRUCATO	Brucato, Courtney L	VA	EHS	<input type="checkbox"/>
COPHANNIGAN	Hannigan, Connor P	VA	EHS	<input type="checkbox"/>
DAJHENDRICKS	Hendricks, Darren J	VA	EHS	<input type="checkbox"/>
DAAHYE	Hye, David A	VA	EHS	<input type="checkbox"/>
CHAJ	J, Cherie A	VA	EHS	<input type="checkbox"/>

Sort Search Results

Once you have the results you are looking for, you can sort it based on key columns on your list (except the Description column/field).

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.



Field Chooser  Download Search Results 

[Select All / Deselect All](#)

Records per Page: 25 (13 total records)

	User ID	User Name ▲ 1	Job Location	Organization ID	Notify
☆	DAEBESSOM	Bessom, David E	VA	EHS	<input type="checkbox"/>
☆	COLBRUCATO	Brucato, Courtney L	VA	EHS	<input type="checkbox"/>
☆	COPHANNIGAN	Hannigan, Connor P	VA	EHS	<input type="checkbox"/>
☆	DAJHENDRICKS	Hendricks, Darren J	VA	EHS	<input type="checkbox"/>
☆	DAAHYE	Hye, David A	VA	EHS	<input type="checkbox"/>
☆	CHAJ	J, Cherie A	VA	EHS	<input type="checkbox"/>

Task E. Downloading Search Results

Once you have the results you are looking for, you can export the data returned in your search query to a CSV file. The file will contain fields that are not currently displayed on the screen with the Field Chooser.

1. To download the search results, click **Download Search Results**.

Depending on the amount of results in your search, it may take a few seconds to generate the CSV file.



Field Chooser  1 **Download Search Results** 

[Select All / Deselect All](#)

Records per Page: 25 (13 total records)

	User ID	User Name ▲	Job Location	Organization ID	Notify
☆	DAEBESSOM	Bessom, David E	VA	EHS	<input type="checkbox"/>
☆	COLBRUCATO	Brucato, Courtney L	VA	EHS	<input type="checkbox"/>
☆	COPHANNIGAN	Hannigan, Connor P	VA	EHS	<input type="checkbox"/>
☆	DAJHENDRICKS	Hendricks, Darren J	VA	EHS	<input type="checkbox"/>
☆	DAAHYE	Hye, David A	VA	EHS	<input type="checkbox"/>
☆	CHAJ	J, Cherie A	VA	EHS	<input type="checkbox"/>

2. When prompted, select **Open** or **Save**.

