


Search/Match

Purpose: Before entering a new person (e.g. Patron) or organization record (e.g. Third Party Contract), use the **Search/Match** feature to determine if that record already exists.

Step	Action																				
1.	<p>Navigate to the Search/Match page. Select Main Menu > Campus Community > Personal Information > Search/Match.</p> <p>Result: The Search/Match page displays.</p> <p>Favorites : Main Menu > Campus Community > Personal Information > Search/Match</p> <p>Search/Match</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value</p> <p>Maximum number of rows to return (up to 300): 300</p> <p>Search Type: =</p> <p>Search Parameter: begins with</p> <p>Ad Hoc Search <input type="checkbox"/></p> <p>Description: begins with</p> <p>Search Clear Basic Search Save Search Criteria</p>																				
2.	<p>Click the Search button.</p> <p>Result: The <i>Search Results</i> page displays.</p>																				
3.	<p>Select CS_Ext Org Traditional Results or CS_Person Traditional from the <i>Search Results</i>.</p> <p>Search Results</p> <p>View All First 1-4 of 4 Last</p> <table border="1"> <thead> <tr> <th>Search Type</th> <th>Search Parameter</th> <th>Ad Hoc Search</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Org</td> <td>PSCS_ORG_TRADNL</td> <td>N</td> <td>CS_Ext Org Traditional Results</td> </tr> <tr> <td>Person</td> <td>PSCS_ADHOC</td> <td>Y</td> <td>CS_Person Adhoc Search</td> </tr> <tr> <td>Person</td> <td>PSCS_FA</td> <td>N</td> <td>Financial Aid Search/Match</td> </tr> <tr> <td>Person</td> <td>PSCS_TRADITIONAL</td> <td>N</td> <td>CS_Person Traditional</td> </tr> </tbody> </table> <p>Result: The <i>Search Criteria</i> page displays</p>	Search Type	Search Parameter	Ad Hoc Search	Description	Org	PSCS_ORG_TRADNL	N	CS_Ext Org Traditional Results	Person	PSCS_ADHOC	Y	CS_Person Adhoc Search	Person	PSCS_FA	N	Financial Aid Search/Match	Person	PSCS_TRADITIONAL	N	CS_Person Traditional
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4.	<p>Enter appropriate criteria on the <i>Search Criteria</i> page.</p> <p>Search Criteria</p> <p>Search Type: Person <input type="checkbox"/> Ad Hoc Search</p> <p>Search Parameter: PSCS_TRADITIONAL CS_Person_Traditional</p> <p>Search Result Rule</p> <p>Search Result Code: PSCS_TRAD_MASI CS_Pers Traditional Result Mask <input type="button" value="User Default"/> <input type="button" value="Search"/> <input type="button" value="Clear All"/> <input type="button" value="Carry ID Reset"/></p> <p>Search Criteria</p> <table border="1"> <thead> <tr> <th>Search Fields</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Address Line 1</td> <td><input type="text"/></td> </tr> <tr> <td>City</td> <td><input type="text"/></td> </tr> <tr> <td>First Name Search</td> <td><input type="text"/></td> </tr> <tr> <td>Last Name Search</td> <td><input type="text"/></td> </tr> <tr> <td>Date of Birth</td> <td><input type="text"/></td> </tr> <tr> <td>Gender</td> <td><input type="text"/></td> </tr> <tr> <td>National Id</td> <td><input type="text"/></td> </tr> </tbody> </table> <div style="border: 2px solid red; padding: 5px; margin: 10px 0;"> <p>Important! Ensure you TAB to exit each field as you enter criteria, otherwise the search buttons will not activate.</p> </div> <p>Note: When you enter criteria on the <i>Search Criteria</i> page, the <i>Search Criteria</i> section displays each of the search fields associated with the search parameter that you selected (In this case, Name Only and Name, Gender display).</p> <p>Search by Order Number</p> <table border="1"> <thead> <tr> <th>Search Order</th> <th>Description</th> <th></th> </tr> </thead> <tbody> <tr> <td>10</td> <td>Name,Addr,City,Bday,Gender,SSN</td> <td><input type="button" value="Selective Search"/></td> </tr> <tr> <td>20</td> <td>SSN Only</td> <td><input type="button" value="Selective Search"/></td> </tr> <tr> <td>25</td> <td>SSN- Last 4 Digits only</td> <td><input type="button" value="Selective Search"/></td> </tr> <tr> <td>30</td> <td>Name,Bday,Gender</td> <td><input type="button" value="Selective Search"/></td> </tr> <tr> <td>40</td> <td>Name,Gender</td> <td><input type="button" value="Selective Search"/></td> </tr> <tr> <td>50</td> <td>Name Only</td> <td><input type="button" value="Selective Search"/></td> </tr> </tbody> </table>	Search Fields	Value	Address Line 1	<input type="text"/>	City	<input type="text"/>	First Name Search	<input type="text"/>	Last Name Search	<input type="text"/>	Date of Birth	<input type="text"/>	Gender	<input type="text"/>	National Id	<input type="text"/>	Search Order	Description		10	Name,Addr,City,Bday,Gender,SSN	<input type="button" value="Selective Search"/>	20	SSN Only	<input type="button" value="Selective Search"/>	25	SSN- Last 4 Digits only	<input type="button" value="Selective Search"/>	30	Name,Bday,Gender	<input type="button" value="Selective Search"/>	40	Name,Gender	<input type="button" value="Selective Search"/>	50	Name Only	<input type="button" value="Selective Search"/>
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5.	<p>Click the Search button (at the top) or click any of the active search by order number Selective Search buttons (at the bottom of the page).</p> <p>Result: The search executes and the results display on the <i>Search Results</i> page.</p> <p>Search Results</p> <p>Search Type: Person <input type="checkbox"/> Ad Hoc Search</p> <p>Search Parameter: PSCS_TRADITIONAL CS_Person_Traditional</p> <p>Result Code: PSCS_TRAD_MASK CS_Pers Traditional Result Mask</p> <p>▼ Search Results Summary Return to Search Criteria</p> <p>Number of ID's Found: 1</p> <p>Search Order Number: 50 Name Only</p> <table border="1" data-bbox="362 814 1417 961"> <thead> <tr> <th colspan="8">Search Results</th> </tr> <tr> <th colspan="2">Results</th> <th colspan="2">Results2</th> <th colspan="2">Additional Information</th> <th colspan="2">[...]</th> </tr> <tr> <th></th> <th></th> <th>Empl ID</th> <th>Name Type</th> <th>Name Effective Date</th> <th>First Name</th> <th>Middle Name</th> <th>Last Name</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Carry ID</td> <td>Detail</td> <td>0799508</td> <td>PRI</td> <td>06/04/2010</td> <td>Luke</td> <td>Skywalker</td> </tr> </tbody> </table> <p>Note: If no results display, you may create a new application.</p>	Search Results								Results		Results2		Additional Information		[...]				Empl ID	Name Type	Name Effective Date	First Name	Middle Name	Last Name	1	Carry ID	Detail	0799508	PRI	06/04/2010	Luke	Skywalker
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6.	<p>Review the list of results on the <i>Search Results</i> page</p> <ul style="list-style-type: none"> • The Number of ID's Found field displays the number of IDs that met the search criteria. This number may be smaller than the number of rows returned in the <i>Search Results</i> grid because the grid might include the same ID multiple times. • The Search Order Number field indicates the search order number at which results were found and indicates how precise the search was—the lower the number, the more restrictive the search and the greater the chance of having found duplicate IDs. 																																
7.	<p>Click the Additional Information tab.</p> <ul style="list-style-type: none"> • Click the <u>Person Organizational Summary</u> link to access the <i>Person Organizational Summary</i> page where you can review the record's status. • Click the <u>Relations With Institution</u> link to access the <i>Campus Solutions Relations With Institution Detail</i> page to view relationships and further clarify whether this is the individual for whom you are searching. 																																
8.	<p>To return to the <i>Results</i> page, click the Results tab.</p>																																
9.	<p>View the details of any record returned in the search by clicking the <u>Detail</u> link After viewing the personal information, click the Close button. </p>																																
10.	<p>Once you determine which is the appropriate record, click the Carry ID button to allow the system to carry the ID forward as you access additional pages.</p>																																