

Job Aid: Searching

Course: Introduction to Plateau Learning Administration

Prerequisite

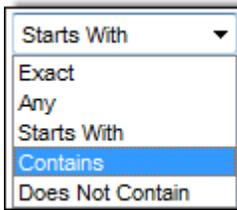
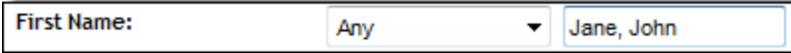
- Introduction to Plateau Learning Administration

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 Plateau Learning.

Tasks

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

Task A. Search Basics	
<p>On each search page, you will most likely see the following terms in the drop-down menu associated with most entities.</p>	
<p>Exact: If you know the precise ID of the record, select Exact from the drop-down menu and click Search.</p>	
<p>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.</p>	
<p>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.</p>	

	<p>Contains: If you know any part of the record, select Contains from the drop-down menu to display the matching records.</p>
	<p>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 a job position, select Is Empty from the drop-down menu for the job positions criteria and click Search.</p> <div data-bbox="381 506 1230 562" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> Job Positions: Is Empty  </div>
<p>You can also choose whether or not you want your search to be case sensitive by using the <i>Case Sensitive Search</i> 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.</p>	<div data-bbox="889 646 1401 709" style="border: 1px solid black; padding: 5px;"> Case sensitive search: <input type="radio"/> Yes <input checked="" type="radio"/> No </div>
<p>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.</p>	<div data-bbox="911 905 1437 974" style="border: 1px solid black; padding: 5px;"> Search All Locales: <input type="radio"/> Yes <input checked="" type="radio"/> No </div>

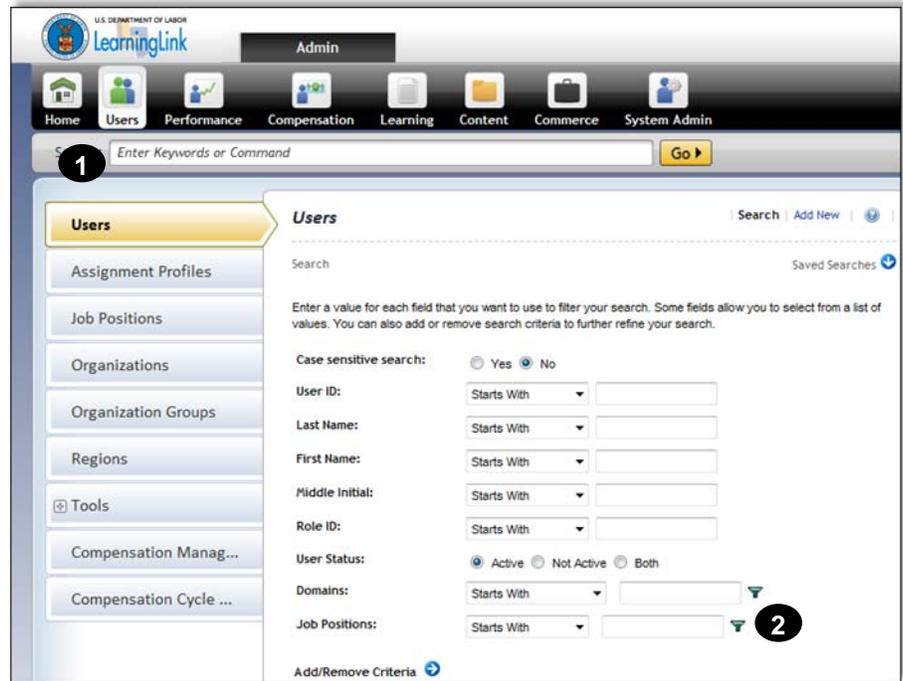
Commonly Used Search Icons

Icon	Description
	The Calendar picker is associated with the date field. Use it to select and populate the corresponding date field.
	Select the Create Filter button to find and select a corresponding entity to include in your search filter.
	Select the Clear Filter button to clear the content of your corresponding search filter.
	Select the Select from List button to find and select a corresponding entity to include in your search criteria.
	Select the Clear List button to clear the list of filters of selected entities in your search filter.
	Select 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 position assigned. You need to specify the job position in a filter and apply that filter to search criteria to see only those users that relate to the selected job position.

- 1 Navigate to Users > Users.
- 2 To create the filter, select the Create Filter icon (🔍) for job positions.

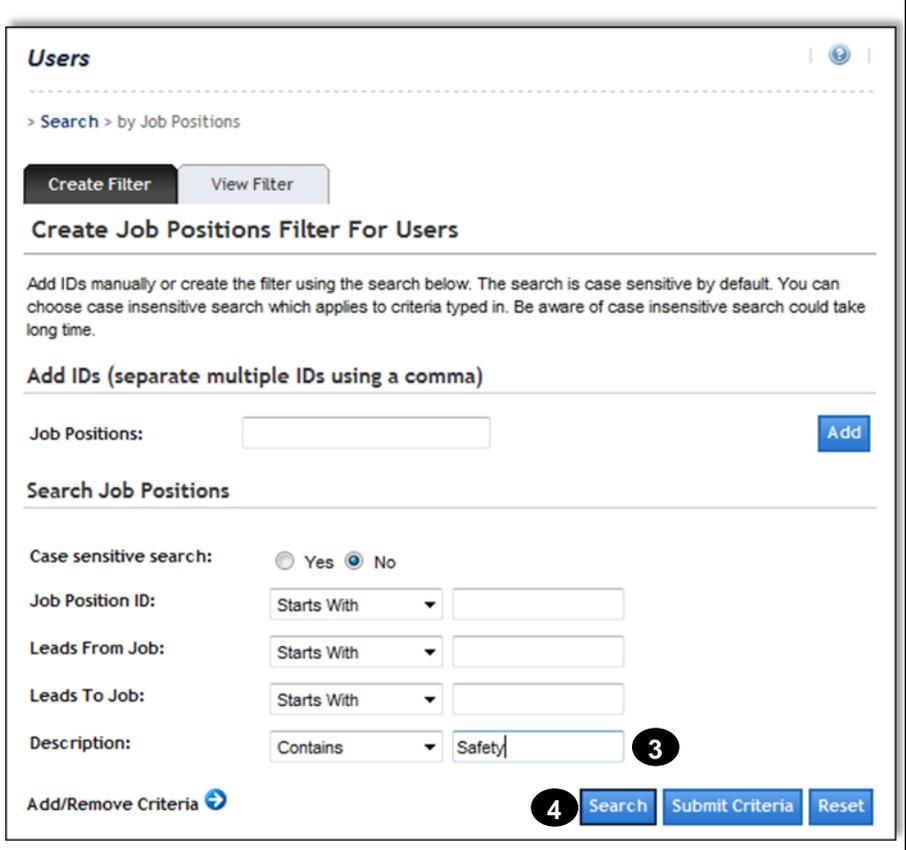


The screenshot shows the LearningLink Admin interface. At the top, there is a navigation bar with icons for Home, Users, Performance, Compensation, Learning, Content, Commerce, and System Admin. Below this is a search bar with the text "Enter Keywords or Command" and a "Go" button. The main content area is titled "Users" and contains a search form. The form includes a "Case sensitive search:" section with radio buttons for "Yes" and "No". Below this are several fields for "User ID:", "Last Name:", "First Name:", "Middle Initial:", and "Role ID:", each with a "Starts With" dropdown menu and an input field. There is also a "User Status:" section with radio buttons for "Active", "Not Active", and "Both". At the bottom, there are "Domains:" and "Job Positions:" fields, each with a "Starts With" dropdown menu and an input field. A "Create Filter" icon (🔍) is visible next to the "Job Positions:" field, which is highlighted with a red circle and the number 2. A red circle with the number 1 is placed over the search bar.

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

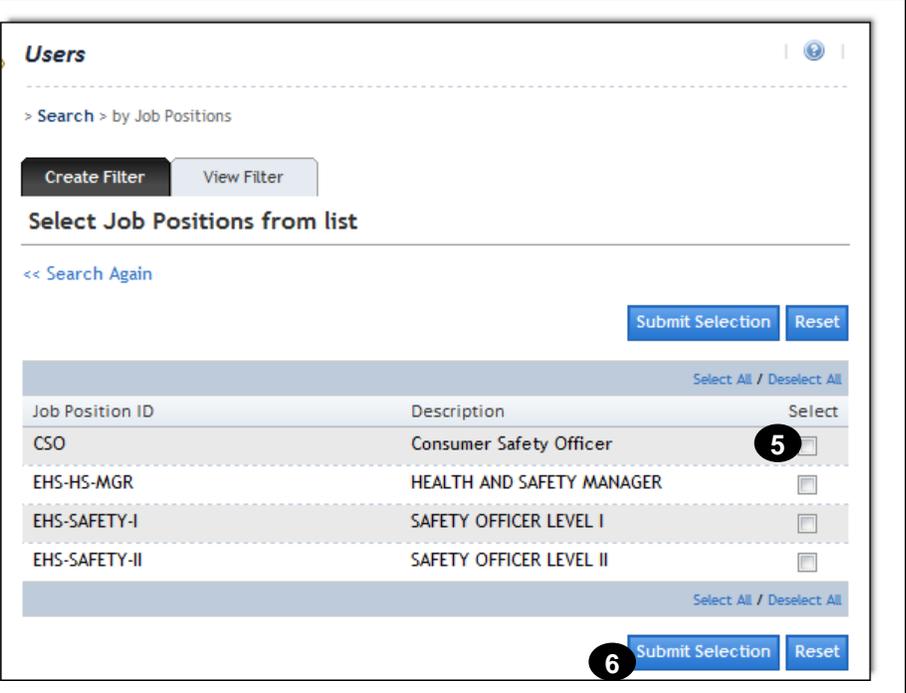
4 Select **Search**.

Note: Breadcrumbs appear in the top left corner indicating where you are in the search process.



5 Select one or more job position checkboxes.

6 Select **Submit Selection**.

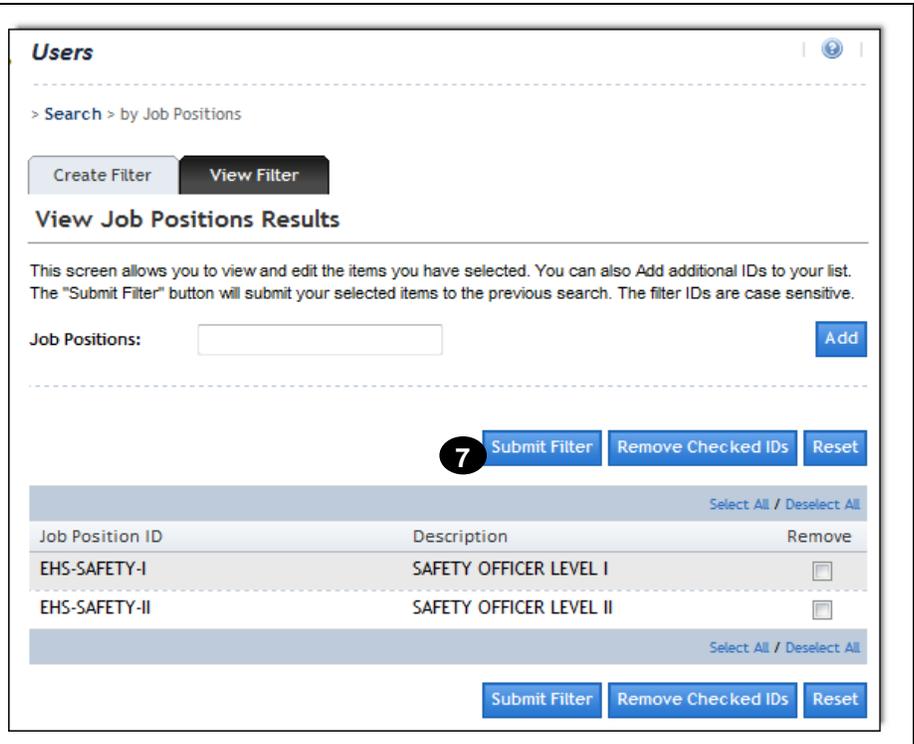


Job Position ID	Description	Select
CSO	Consumer Safety Officer	<input checked="" type="checkbox"/>
EHS-HS-MGR	HEALTH AND SAFETY MANAGER	<input type="checkbox"/>
EHS-SAFETY-I	SAFETY OFFICER LEVEL I	<input type="checkbox"/>
EHS-SAFETY-II	SAFETY OFFICER LEVEL II	<input type="checkbox"/>

You are returned to the filter screen to view the filter just created.

Confirm your selection(s) are correct.

7 Select **Submit Filter**.



Users

> Search > by Job Positions

Create Filter View Filter

View Job Positions Results

This screen allows you to view and edit the items you have selected. You can also Add additional IDs to your list. The "Submit Filter" button will submit your selected items to the previous search. The filter IDs are case sensitive.

Job Positions: Add

Submit Filter Remove Checked IDs Reset

Job Position ID	Description	Remove
EHS-SAFETY-I	SAFETY OFFICER LEVEL I	<input type="checkbox"/>
EHS-SAFETY-II	SAFETY OFFICER LEVEL II	<input type="checkbox"/>

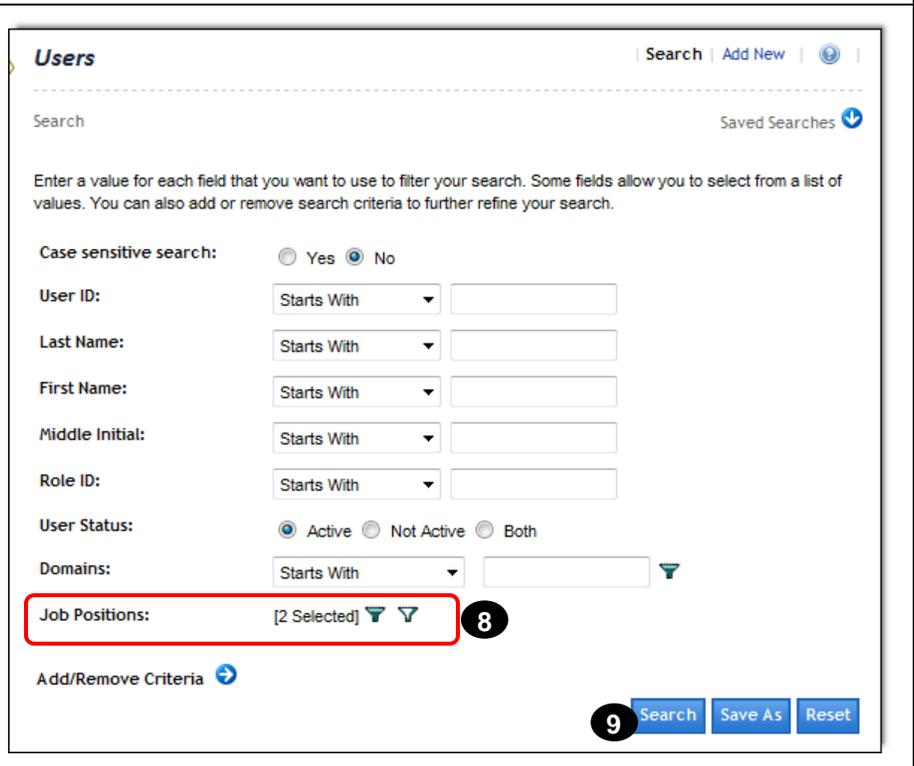
Submit Filter Remove Checked IDs Reset

Once you have submitted your filter, you are returned to your original search screen.

8 You now see that the job position attribute has two (2) criteria selected for this filter.

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

9 Select **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.

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 Positions: [2 Selected] ⌵ ⌵ **8**

Add/Remove Criteria

9 Search Save As Reset

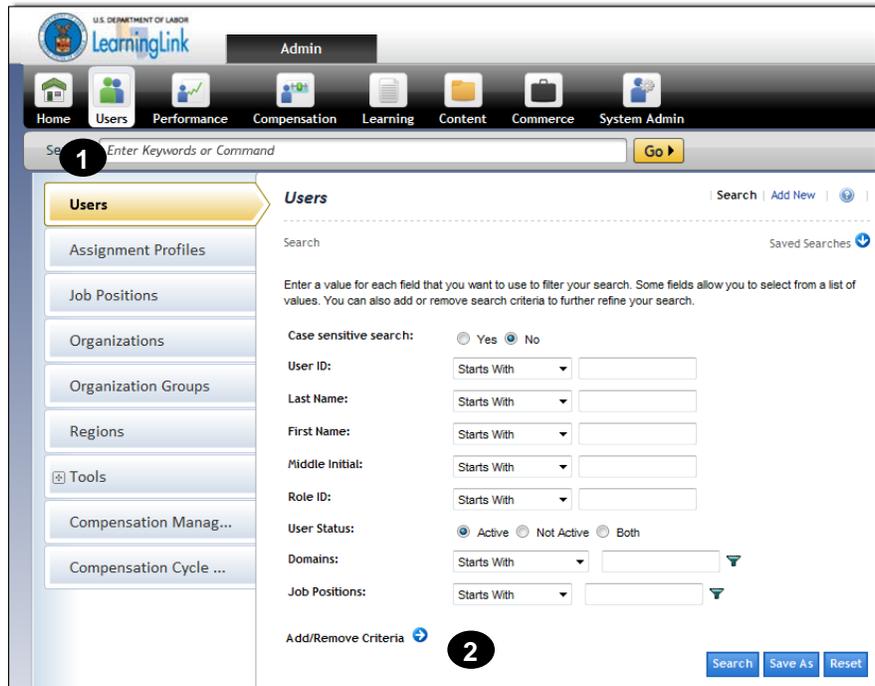
Task C. Add/Remove Criterion from Search Filter

Each entity in Plateau Learning has multiple attributes and you may find that some of the

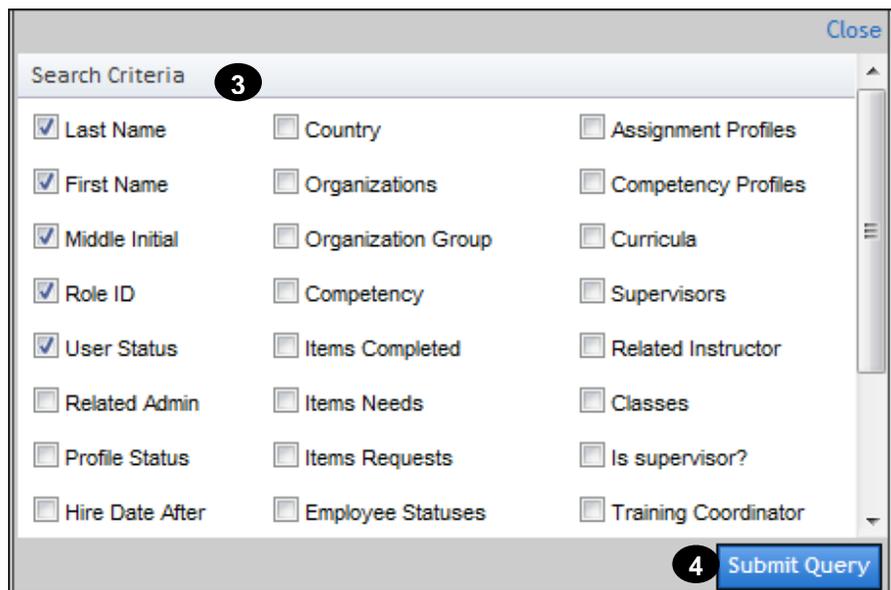
attributes are more useful than others in conducting searches. Plateau Learning gives you the choice to determine the attributes of the entity that you would like to use as criteria for your search.

Let's now search for all users within a specific organization.

- 1 Navigate to Users > Users.
- 2 Select the **Add/Remove Criteria** icon (➔).



- 3 Select the criteria check boxes to add to the search screen.
- 4 Select **Submit Query**.



The new criteria appear on the search screen.

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:

Last Name:

First Name:

Middle Initial:

Role ID:

User Status: Active Not Active Both

Domains: 

Country: 

Job Positions: 

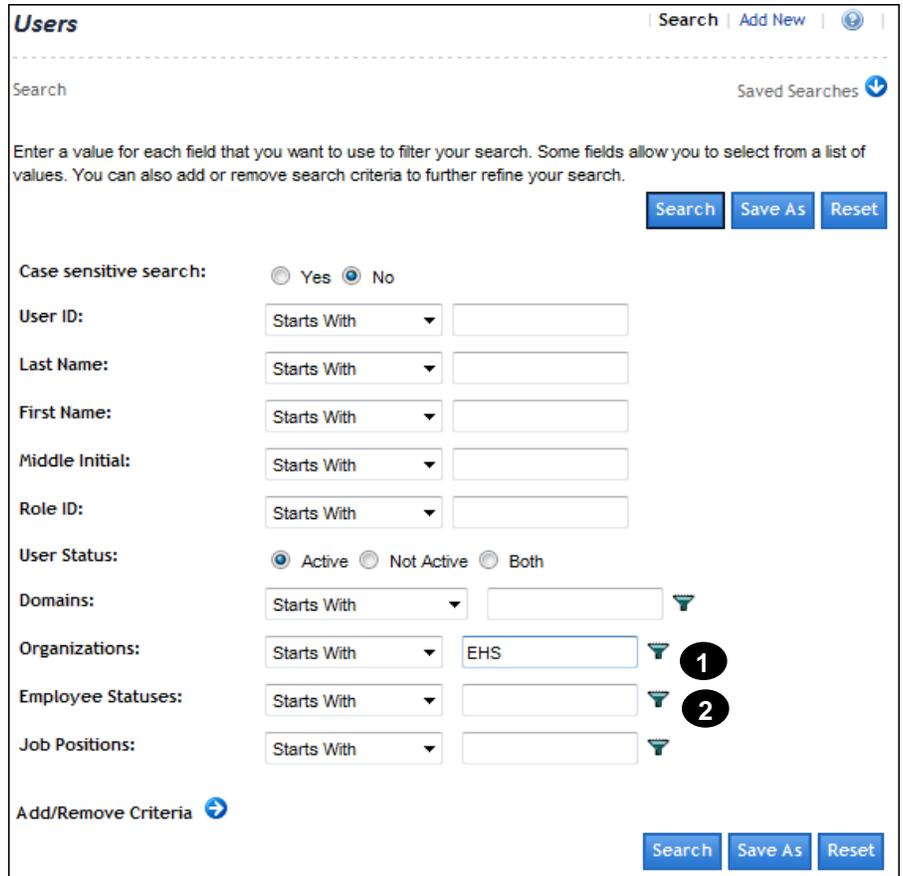
Add/Remove Criteria 

[Search](#) [Save As](#) [Reset](#)

Task D. Select from a List

Plateau Learning 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 Organizations textbox, type EHS.
- 2 Next to the Employee Statuses field, select the Filter icon (🔍).



The screenshot shows the 'Users' search page. At the top right, there are links for 'Search', 'Add New', and a help icon. Below this is a 'Search' section with a 'Saved Searches' dropdown. A note states: '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.' There are 'Search', 'Save As', and 'Reset' buttons. The search criteria are as follows:

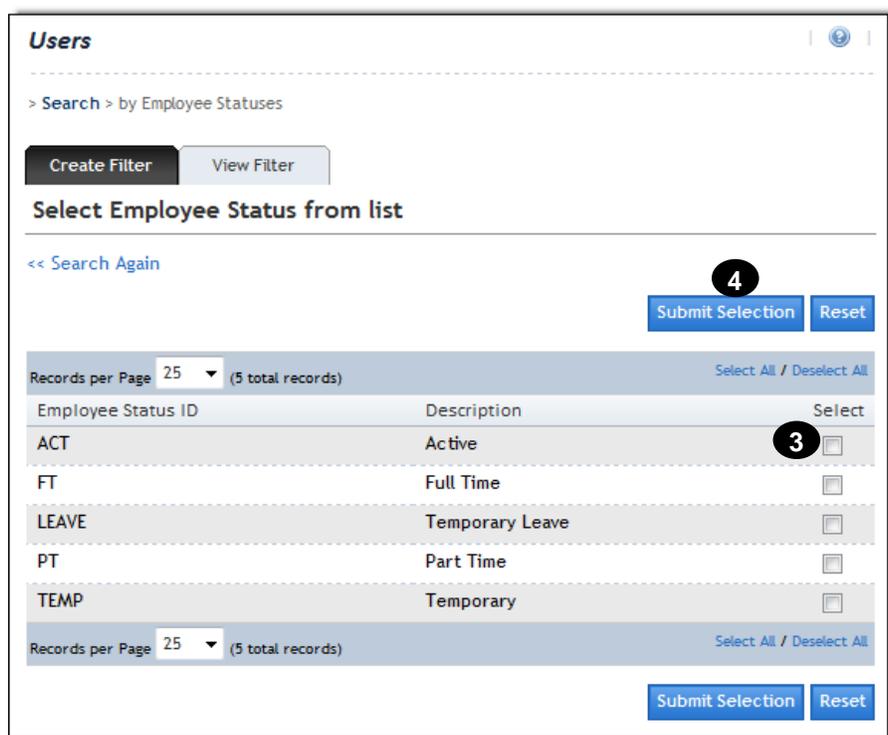
- Case sensitive search: Yes No
- User ID: Starts With []
- Last Name: Starts With []
- First Name: Starts With []
- Middle Initial: Starts With []
- Role ID: Starts With []
- User Status: Active Not Active Both
- Domains: Starts With [] 🔍
- Organizations: Starts With [EHS] 🔍 **1**
- Employee Statuses: Starts With [] 🔍 **2**
- Job Positions: Starts With [] 🔍

At the bottom left, there is an 'Add/Remove Criteria' link with a plus icon. At the bottom right, there are 'Search', 'Save As', and 'Reset' buttons.

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

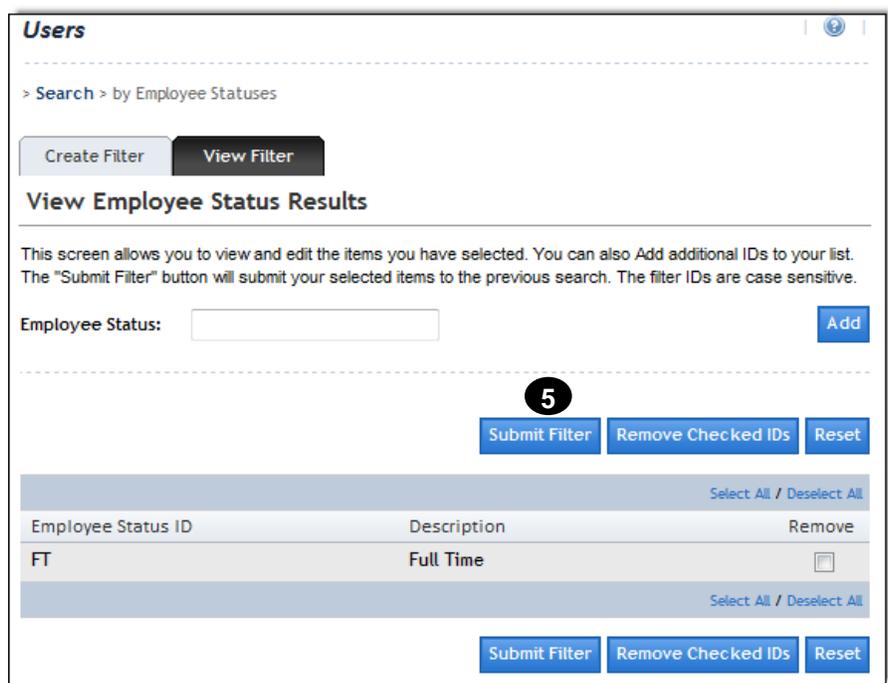
3 Select the checkbox(es) for the record(s) to be selected.

4 Select Submit Selection.



The selection has been added to the search filter. Review the filter for accuracy.

5 Select Submit Filter to continue.



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

Users Search | Add New | Help

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 [] Filter

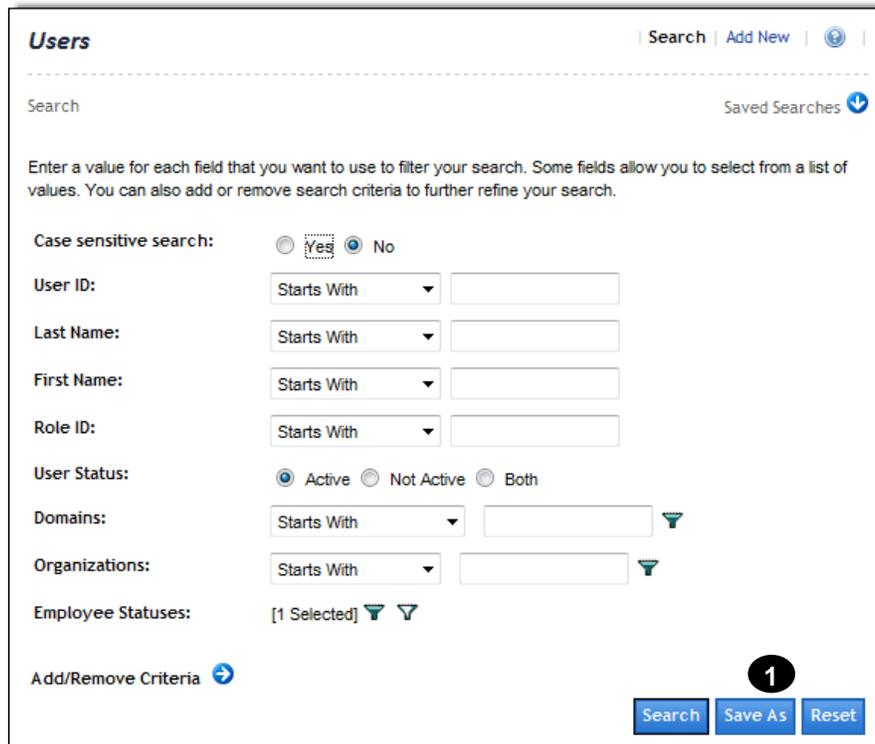
Organizations: Starts With [] Filter

Employee Statuses: [1 Selected] Filter Filter

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.

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

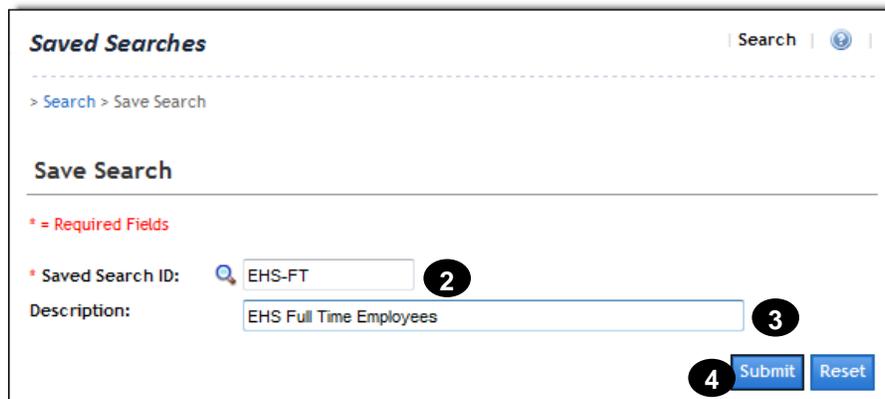


The system prompts you for an ID for your saved search and a brief description of the search.

2 Enter an ID in the Saved Search ID textbox.

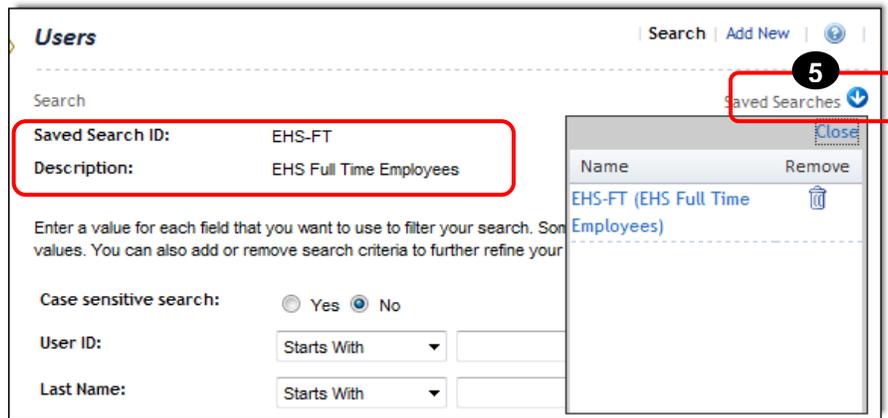
3 Enter an intuitive description in the Description textbox.

4 Select **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.

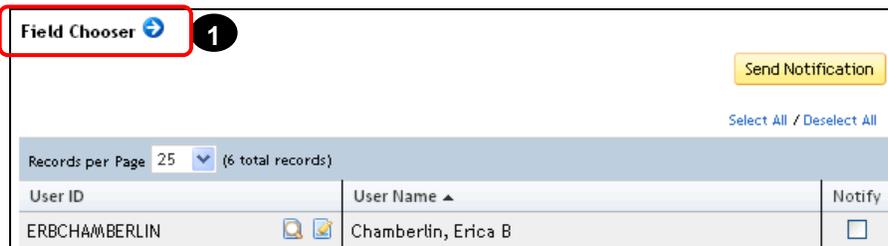
Note: If you select a saved search, the search ID and description appear at the top of the page.



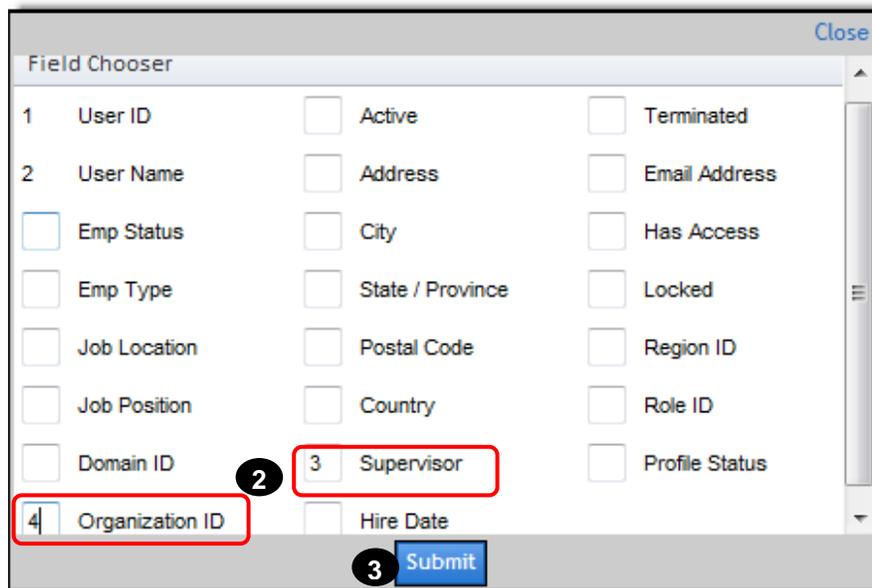
Task F. Adjust the Display of Search Results

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.

1 Select the **Field Chooser** icon (🔍) above the search results list to determine which attributes of the listed entities that you want and in which column.



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



3 Select **Submit**.

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

View the new fields added to the search results.

Field Chooser  Download Search Results 

[Send Notification](#)

[Select All / Deselect All](#)

Records per Page 25 Page: 1 2 3 4 5 «Previous Next» (2,968 total records) Page 1 of 119. [Go](#)

User ID	User Name ▲	Supervisor	Organization ID	Notify
LYEABEL	  Abel, Lyndsey E		AUTO	<input type="checkbox"/>
WESABER	  Aber, Wendy S	JAAFALTUM	HR	<input type="checkbox"/>
TOCABERTS	  Aberts, Todd C	VINGREGORY	AIR	<input type="checkbox"/>
ROABIMOURCHED	  Abimourched, Rola	EMEGROGG	RAIL	<input type="checkbox"/>
MINABRAMS	  Abrams, Michelle N	JAAFALTUM	RAIL	<input type="checkbox"/>

Task G. 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 select 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 

[Send Notification](#)

[Select All / Deselect All](#)

Records per Page 25 Page: 1 2 3 4 5 «Previous Next» (3,071 total records) Page 1 of 123. [Go](#)

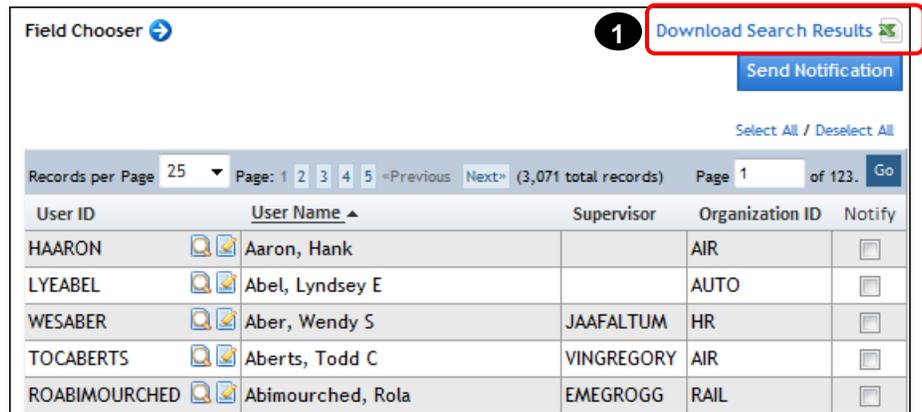
User ID	User Name ▲	Supervisor	Organization ID	Notify
HAARON	  Aaron, Hank		AIR	<input type="checkbox"/>
LYEABEL	  Abel, Lyndsey E		AUTO	<input type="checkbox"/>
WESABER	  Aber, Wendy S	JAAFALTUM	HR	<input type="checkbox"/>
TOCABERTS	  Aberts, Todd C	VINGREGORY	AIR	<input type="checkbox"/>
ROABIMOURCHED	  Abimourched, Rola	EMEGROGG	RAIL	<input type="checkbox"/>

Task H. 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, select **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 

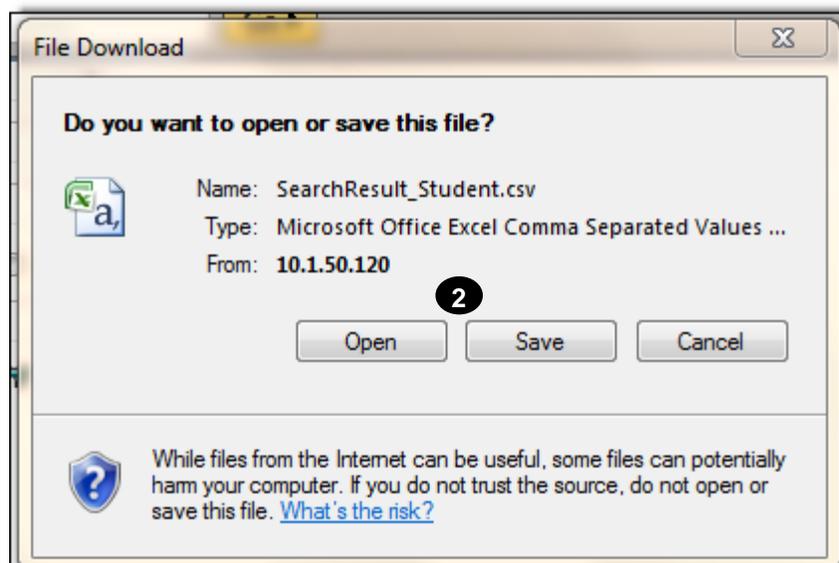
Send Notification

Select All / Deselect All

Records per Page 25 Page: 1 2 3 4 5 «Previous Next» (3,071 total records) Page 1 of 123. Go

User ID	User Name	Supervisor	Organization ID	Notify
HAARON	Aaron, Hank		AIR	<input type="checkbox"/>
LYEABEL	Abel, Lyndsey E		AUTO	<input type="checkbox"/>
WESABER	Aber, Wendy S	JAAFALTUM	HR	<input type="checkbox"/>
TOCABERTS	Aberts, Todd C	VINGREGORY	AIR	<input type="checkbox"/>
ROABIMOURCHED	Abimourched, Rola	EMEGROGG	RAIL	<input type="checkbox"/>

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



File Download

Do you want to open or save this file?

 Name: SearchResult_Student.csv
Type: Microsoft Office Excel Comma Separated Values ...
From: 10.1.50.120

2 Open Save Cancel

 While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

Notes