

Search/Match is the tool that can assist in associating the student with their correct emplid (identification number). Search/Match is particularly useful for any staff who:

- Add/Update a Person
- Create/Update a Prospective Student
- Use Application Entry

Search/Match can be accessed from a number of components in PeopleSoft:

Campus Community > Personal Information > Search/Match

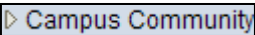
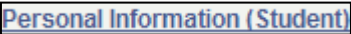

Campus Community > Personal Information (Student) > Search/Match

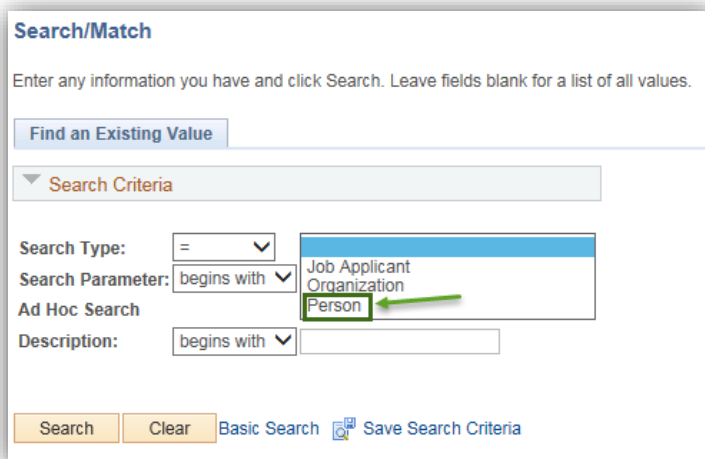
Student Admissions > Application Entry > Search/Match

This job aid will include instructions on how to:

- Complete a Basic Search and Save Search Criteria (Basic Search)
- Complete Ad Hoc Search and Save Search Criteria (Ad Hoc Search)
- Using Saved Search Criteria
- Save it as a Favorite to be used frequently
- Delete/Edit a favorite Search/Match

Complete a Basic Search

1. Click the **Campus Community** link.

2. Click the **Personal Information (Student)** link.

3. Click the **Search/Match** link.

4. From Search/Match, click the Search type and select **Person**.



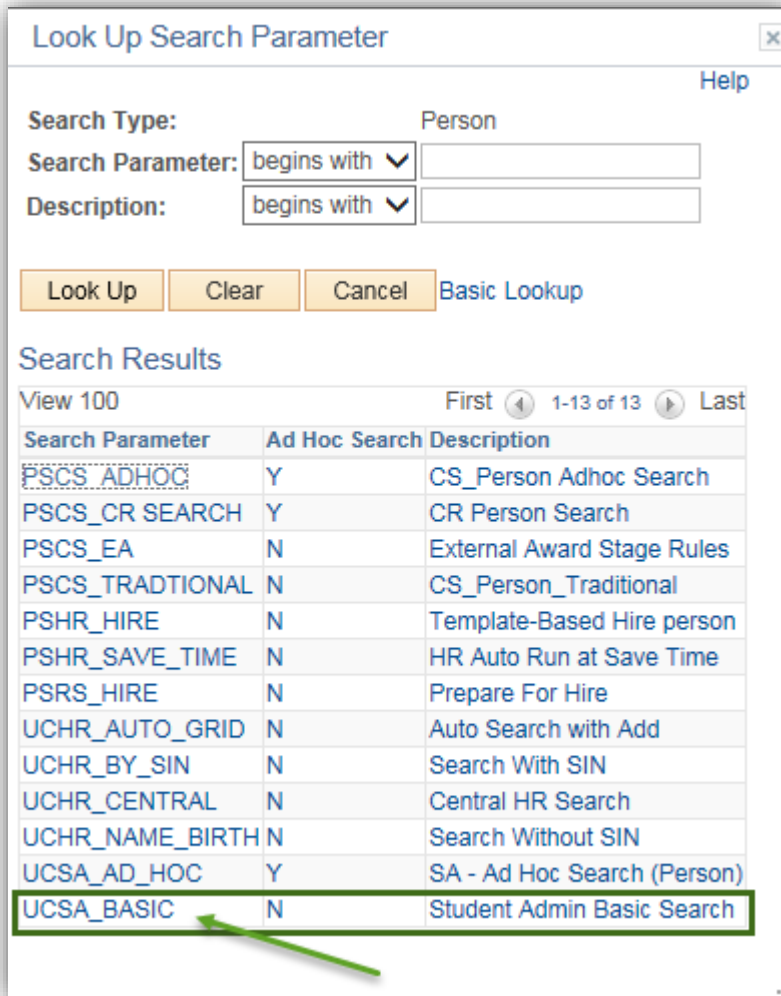
The screenshot shows the 'Search/Match' interface. At the top, there is a 'Find an Existing Value' button. Below it is a 'Search Criteria' dropdown menu. The 'Search Type' dropdown is set to '=', and the 'Search Parameter' dropdown is set to 'begins with'. A dropdown menu is open for the 'Search Parameter', showing three options: 'Job Applicant', 'Organization', and 'Person'. A green arrow points to the 'Person' option. Below the dropdowns are 'Ad Hoc Search' and 'Description' fields. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

Search Match

Create, Save & Delete

SA – Student Administration Basics

5. Click the Search Parameter **Look Up**. The two search parameters used for Student Administration search match are:
- UCSA_AD_HOC: SA - Ad Hoc Search (Person)
 - UCSA_BASIC: Student Admin Basic Search.
- Select **UCSA_BASIC Student Admin Basic Search**.



Look Up Search Parameter

Search Type: Person

Search Parameter: begins with

Description: begins with

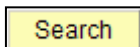
Look Up Clear Cancel Basic Lookup

Search Results

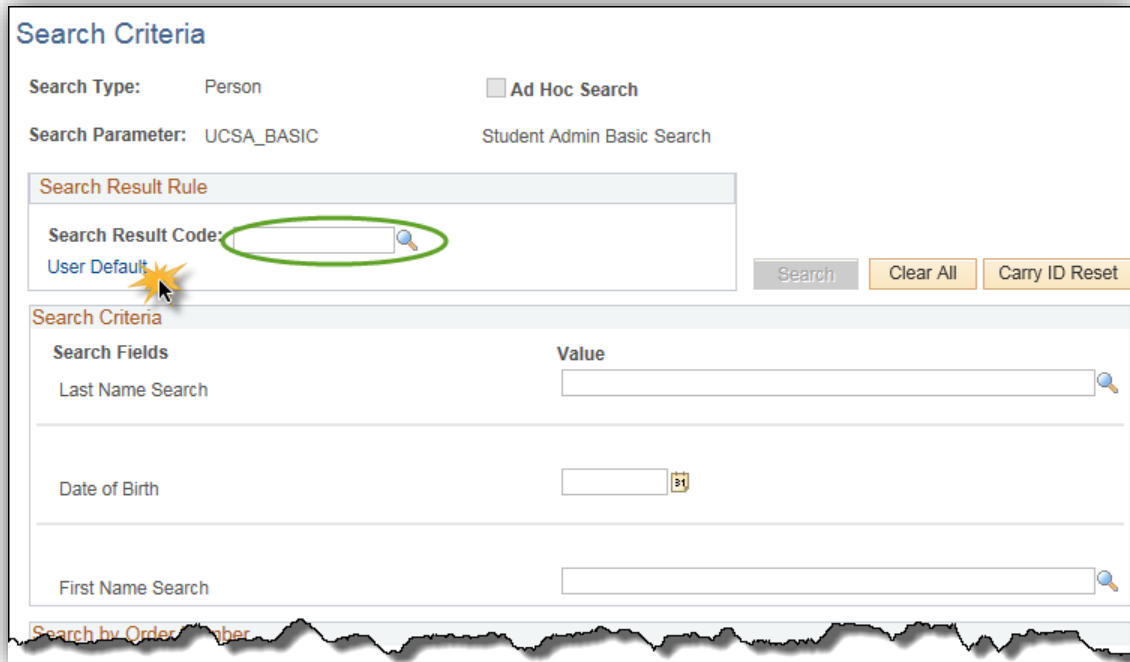
View 100 First 1-13 of 13 Last

Search Parameter	Ad Hoc Search	Description
PSCS_ADHOC	Y	CS_Person Adhoc Search
PSCS_CR SEARCH	Y	CR Person Search
PSCS_EA	N	External Award Stage Rules
PSCS_TRADITIONAL	N	CS_Person_Traditional
PSHR_HIRE	N	Template-Based Hire person
PSHR_SAVE_TIME	N	HR Auto Run at Save Time
PSRS_HIRE	N	Prepare For Hire
UCHR_AUTO_GRID	N	Auto Search with Add
UCHR_BY_SIN	N	Search With SIN
UCHR_CENTRAL	N	Central HR Search
UCHR_NAME_BIRTH	N	Search Without SIN
UCSA_AD_HOC	Y	SA - Ad Hoc Search (Person)
UCSA_BASIC	N	Student Admin Basic Search

6. Click the **Search** button.



7. The first time using Search/Match a Search Result Code must be entered. Click the **User Default** link.





Search Criteria

Search Type: Person Ad Hoc Search




Search Parameter: UCSA_BASIC Student Admin Basic Search

Search Result Rule

Search Result Code: 

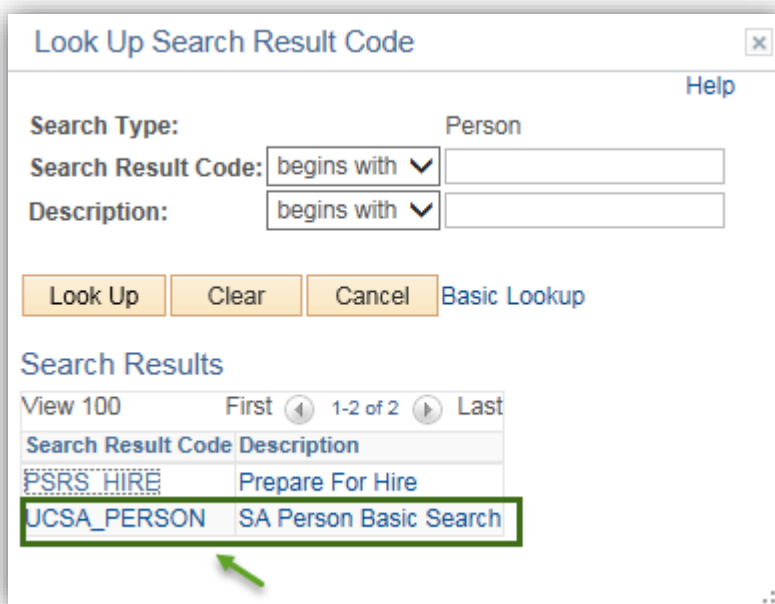
[User Default](#) 

Search Criteria

Search Fields	Value
Last Name Search	<input type="text"/> 
Date of Birth	<input type="text"/> 
First Name Search	<input type="text"/> 

[Search by Order Number](#)

8. From the Search Results, select **UCSA_PERSON SA Person Basic Search**. **Note:** You will only have to set this once.



Look Up Search Result Code Help



Search Type: Person

Search Result Code: begins with


Description: begins with

[Basic Lookup](#)

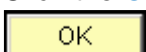
Search Results

View 100 First  1-2 of 2  Last

Search Result Code	Description
PSRS_HIRE	Prepare For Hire
UCSA_PERSON	SA Person Basic Search



9. Click the **OK** button.

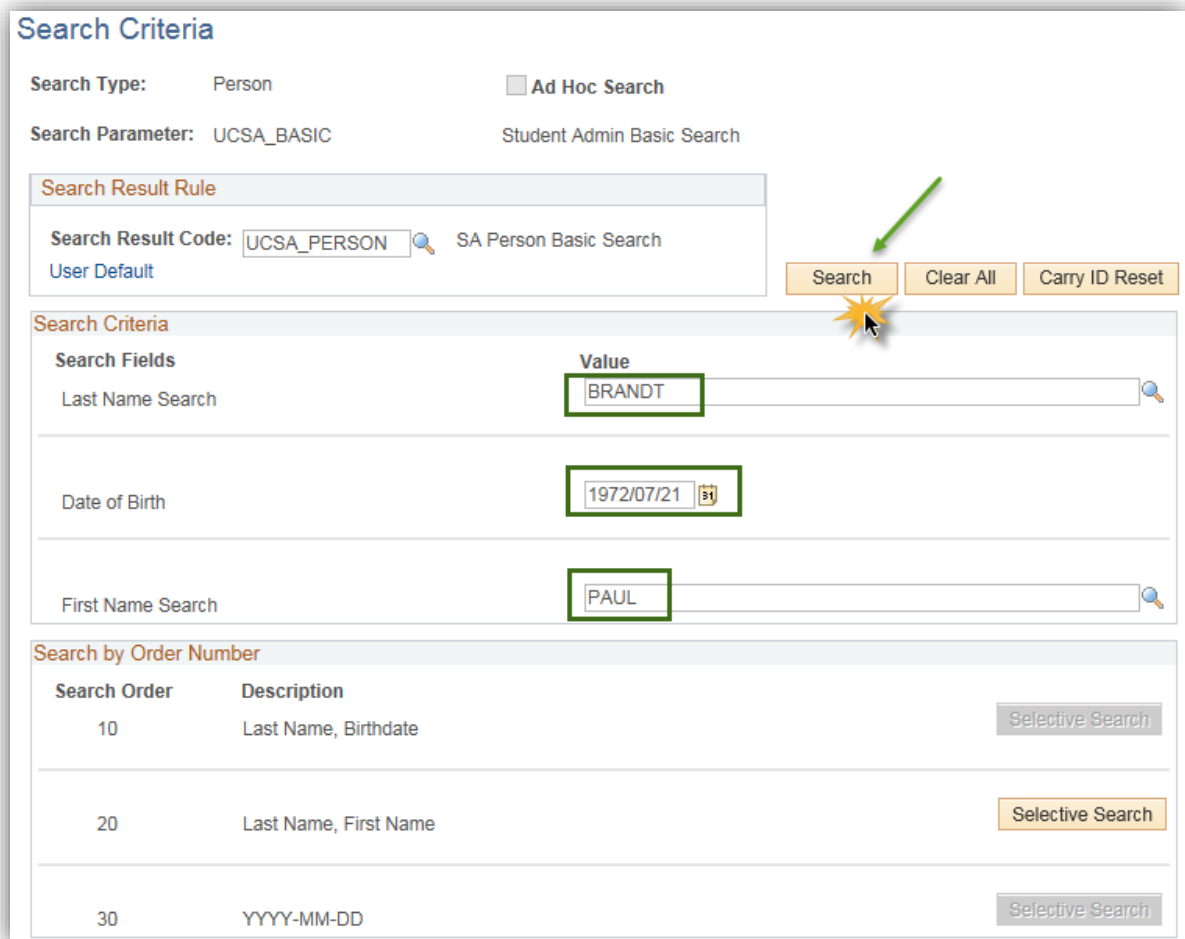
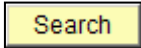


Search Match

Create, Save & Delete

SA – Student Administration Basics

10. Complete the Last Name and First Name fields in the Search Criteria, then press **Search**. Enter the birth date if available. Click the **Search** button.



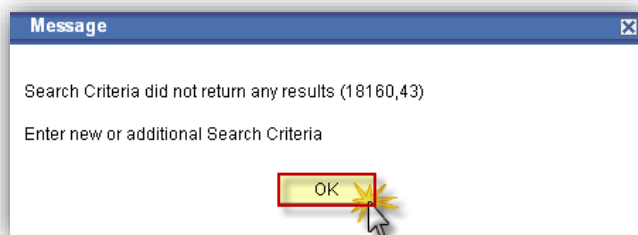
The screenshot shows the 'Search Criteria' form with the following fields and values:

- Search Type:** Person
- Search Parameter:** UCSA_BASIC
- Search Result Code:** UCSA_PERSON
- Search Fields:**
 - Last Name Search: BRANDT
 - Date of Birth: 1972/07/21
 - First Name Search: PAUL

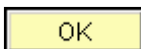
Buttons: Search, Clear All, Carry ID Reset

Search Order	Description	Action
10	Last Name, Birthdate	Selective Search
20	Last Name, First Name	Selective Search
30	YYYY-MM-DD	Selective Search

11. This message will appear if the search is unsuccessful based on the criteria entered.




Click the **OK** button.



- When the Search Results Summary lists the results, click **View All**. For easier view, sort the fields alphabetically by clicking on the column header (e.g. Last Name).



Number of ID's Found: 34
Search Order Number: 30 YYYY-MM-DD

Search Results Personalize | Find | **View All** |  First 1-20 of 64 Last

Results	Results2	Additional Information	Empl ID	Student Career	Date of Birth	Last Name	First Name	Middle Name
1	Carry ID		00209956	UGRD	1972/07/21	Kmech	William	Osman
2	Carry ID		00209956	UGRD	1972/07/21	Kmech	William	Osman
3	Carry ID		00209956	GRAD	1972/07/21	Kmech	William	Osman
4	Carry ID		00209956	GRAD	1972/07/21	Kmech	William	Osman
5	Carry ID		00218617	GRAD	1972/07/21	POURFARAJ	Andrey	Cowell
6	Carry ID		00218617	GRAD	1972/07/21	POURFARAJ	Andrey	Cowell
7	Carry ID		00218658	GRAD	1972/07/21	POURFARAJ	Charles	M

Saving a Basic Search in Save Search Criteria

If this type of search is used frequently it is recommended to save it in the Save Search Criteria. The following steps explain how to save a **Basic Search** in **Save Search Criteria**.

- From the Search Menu click the **Search Type** list and click the **Person** list item.

- Click the **Look Up** button.

- A list of Search Parameters will appear. Scroll down to **Student Admin Basic Search (UCSA_BASIC)**.

Click the **Student Admin Basic Search** link.

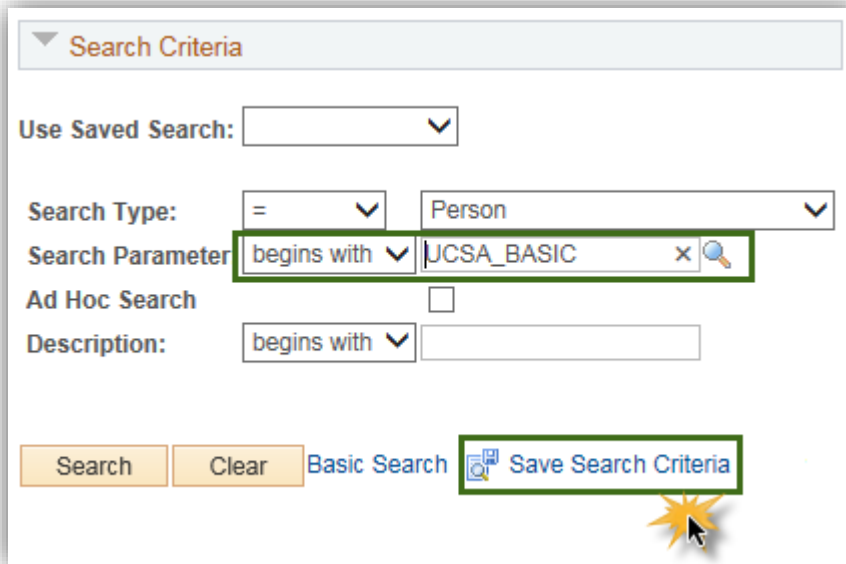


Search Match

Create, Save & Delete

SA – Student Administration Basics

4. Save the Search Parameter for Basic Search to be used in future. Click the [Save Search Criteria](#) link.



Search Criteria

Use Saved Search:

Search Type: = Person

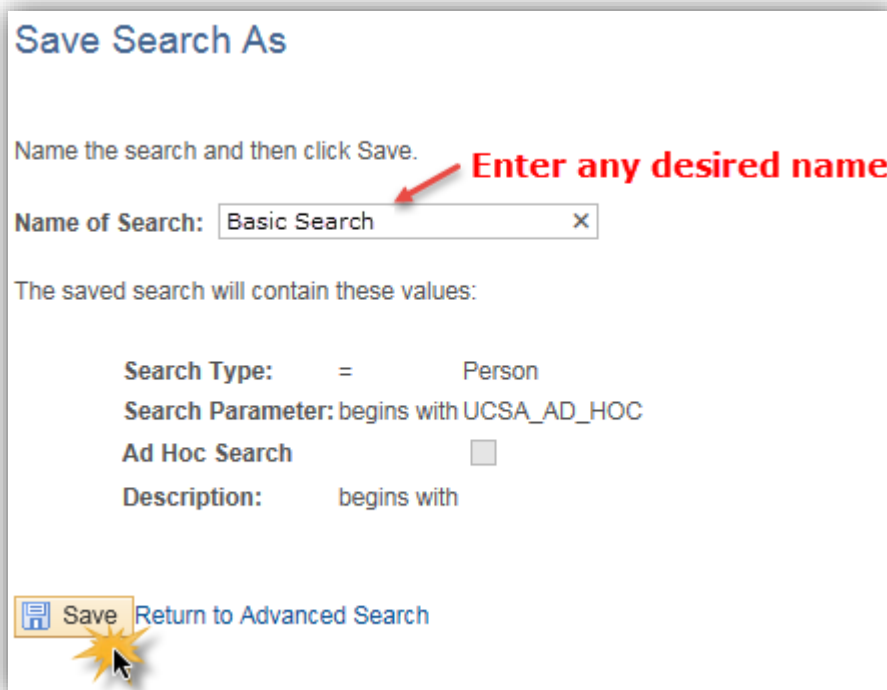
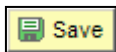
Search Parameter: begins with UCSA_BASIC

Ad Hoc Search

Description: begins with

Search Clear Basic Search **Save Search Criteria**

5. The [Save Search As](#) menu will appear. Enter a definitive name for the Name of Search (eg. Basic Your Name). Click the [Save](#) button.



Save Search As

Name the search and then click Save. **Enter any desired name**

Name of Search: Basic Search

The saved search will contain these values:

Search Type: = Person

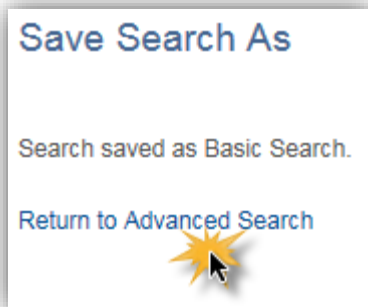
Search Parameter: begins with UCSA_AD_HOC

Ad Hoc Search

Description: begins with

Save Return to Advanced Search

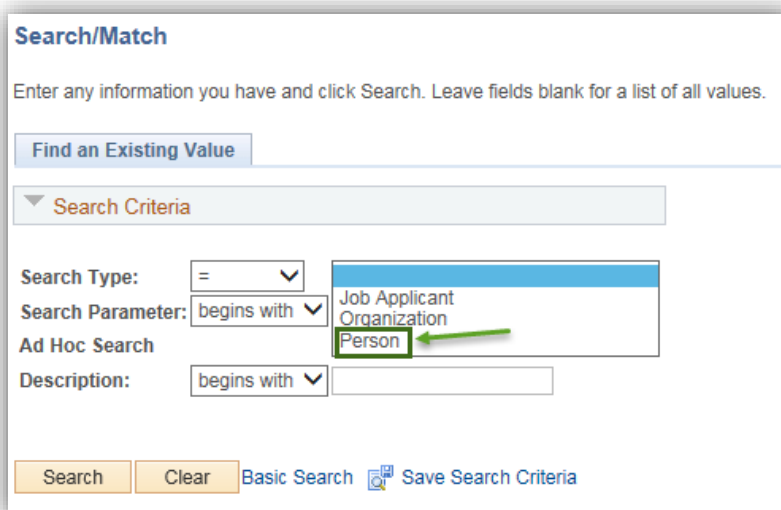
- A confirmation will indicate the name of the Saved Search (e.g. Basic Your Name).
Click the [Return to Advanced Search](#) link.
[Return to Advanced Search](#)



Complete an Ad Hoc Search

The next steps explain using the Ad Hoc Search. Ad Hoc Searches offer more flexibility with Search/Match. More options (operands) are available with Ad Hoc search match (e.g. name contains, etc.)

- Click the [Campus Community](#) link.
[Campus Community](#)
- Click the [Personal Information \(Student\)](#) link.
[Personal Information \(Student\)](#)
- Click the [Search/Match](#) link.
[Search/Match](#)
- From Search/Match, click the [Search type](#) and select [Person](#).

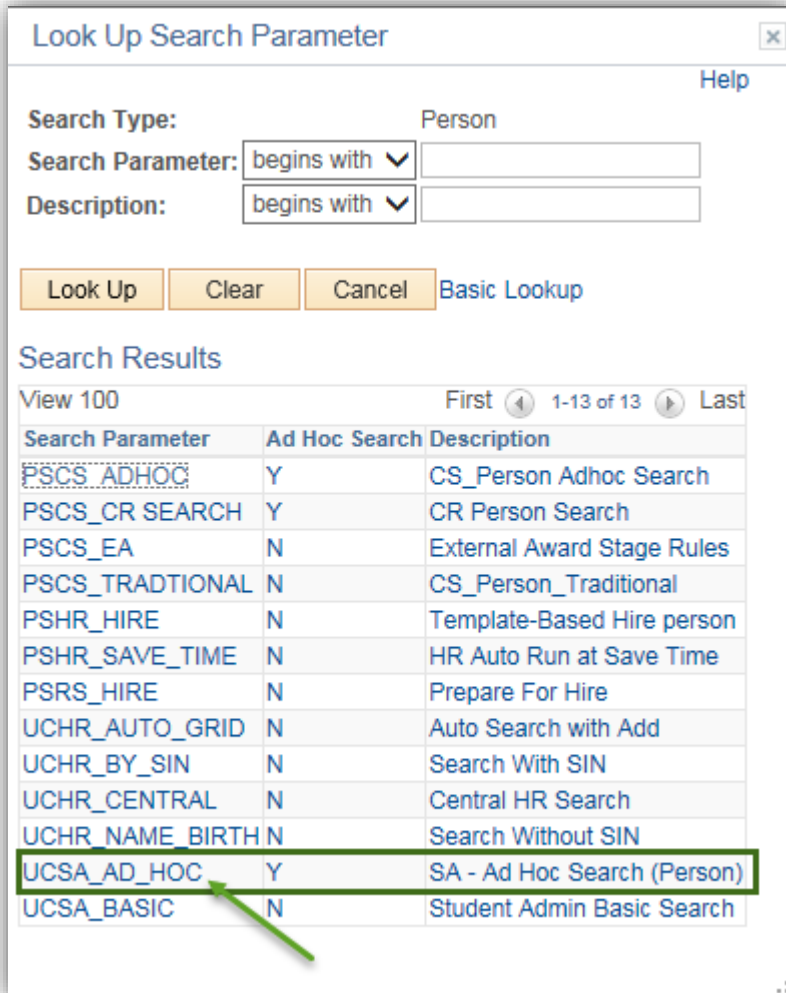


Search Match

Create, Save & Delete

SA – Student Administration Basics

- Click the Search Parameter **Look Up** and select **UCSA_AD_HOC: SA - Ad Hoc Search (Person)**.



Look Up Search Parameter

Search Type: Person

Search Parameter: begins with

Description: begins with

Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1-13 of 13 Last

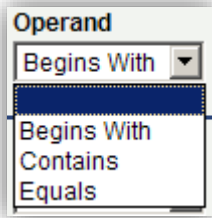
Search Parameter	Ad Hoc Search	Description
PSCS_ADHOC	Y	CS_Person Adhoc Search
PSCS_CR_SEARCH	Y	CR Person Search
PSCS_EA	N	External Award Stage Rules
PSCS_TRADITIONAL	N	CS_Person_Traditional
PSHR_HIRE	N	Template-Based Hire person
PSHR_SAVE_TIME	N	HR Auto Run at Save Time
PSRS_HIRE	N	Prepare For Hire
UCHR_AUTO_GRID	N	Auto Search with Add
UCHR_BY_SIN	N	Search With SIN
UCHR_CENTRAL	N	Central HR Search
UCHR_NAME_BIRTH	N	Search Without SIN
UCSA_AD_HOC	Y	SA - Ad Hoc Search (Person)
UCSA_BASIC	N	Student Admin Basic Search

- Click the **Search** button.

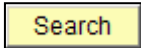
Search

7. Operands offer additional flexibility when using Search/Match. Operands allow 3 types of searches:
- Begins With allows an alphabetical search based on the first letter
 - Contains allows searches for any combination of letters within a name
 - Equals searches for an exact name match

To view the Operands, click the **Operand list drop down**.



8. To allow for a broader search it is recommended that you use part of the name rather than the entire name and the operand **Contains**. If more search criteria was available the other fields could also be used. Enter the Alberta Student Number (ASN) if available, in External System ID. If possible, use the operand **Equals** to include the birthdate to narrow the search results. Click the **Search** button to view the Search Results containing the selection criteria.



Search Criteria

Search Type: Person Ad Hoc Search

Search Parameter: UCSA_AD_HOC SA - Ad Hoc Search (Person)

Search Result Rule

Search Result Code: UCSA_PERSON SA Person Basic Search

User Default

[Return to Search Results](#)

Search Fields	Operand	Value
Last Name Search	Contains	MORRIS
First Name Search	Begins With	T
Middle Name	Begins With	
Date of Birth	Equals	1991/06/12
External System Id	Begins With	

Search Match

Create, Save & Delete

SA – Student Administration Basics



- Important:** By entering the birthdate it can refine the search/match significantly. Carry ID will enable the EmplID (student ID) to autopopulate the EmplID if continuing to work with this student on other components/pages in PeopleSoft.

Search Results

Search Type: Person Ad Hoc Search

Search Parameter: UCSA_AD_HOC SA - Ad Hoc Search (Person)

Result Code: UCSA_PERSON SA Person Basic Search

Search Results Summary [Return to Search Criteria](#)

Number of ID's Found: 1

Search Order Number: 10 SA - Person AD HOC Search

Search Results Personalize | Find | View 20 | First 1 of 1 Last

Results	Results2	Additional Information	Empl ID	Student Career	Date of Birth	Last Name	First Name	Middle Name
1	Carry ID		10120048	UGRD	1991/06/12	Morris	Tara	Brooks

- The **Results2 tab** will display the External System ID if applicable. For this example the Alberta Student Number is listed.

Search Results Personalize | Find | View 20 | First 1 of 1 Last

Results **Results2** Additional Information

Results	Results2	Additional Information	Empl ID	Name Type	External System ID	Name Effective Date	Emplid Type	Alternate ID
1	Carry ID		10120048	PRI	ASN564444	2012/09/25	Student	

Alberta Student Number

Saving an Ad Hoc Search in Save Search Criteria

The next steps explain how to save an Ad Hoc Search in Save Search Criteria.

- From the Search menu:
Click the **Search Type** list.

- Click the **Person** list item.

3. Click the **Look Up** button.

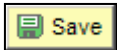


4. Click the **SA - Ad Hoc Search (Person)** link.

[SA - Ad Hoc Search \(Person\)](#)

5. Click the **Save Search Criteria** link.

6. The Save Search As menu will appear. Enter a definitive name for the Name of Search (e.g. Ad Hoc Your Name). Click the **Save** button.



7. A confirmation will appear indicating the name of the Saved Search (e.g. Ad Hoc Your Name). Click the **Return to Advanced Search** link.

[Return to Advanced Search](#)

Using Save Search Criteria: Basic Search or Ad Hoc Search

The next steps explain how to use **Save Search Criteria**.

1. To view any **Saved Search Criteria** click on the drop down and select the appropriate saved search criteria.

Click the **Basic (Your Name)** or the **Ad Hoc Search** list item.

[Basic \(Your Name\)](#)

2. Select which search you wish to use (Basic or Ad Hoc) and press enter to navigate to the Search Criteria fields. Depending on which Search is selected the corresponding Search Criteria menu display.

Delete Saved Search Criteria

The next steps explain how to delete **Saved Search Criteria**.

1. From the **Search/Match** page, the **Delete Saved Search** link will appear if there is Save Search Criteria.

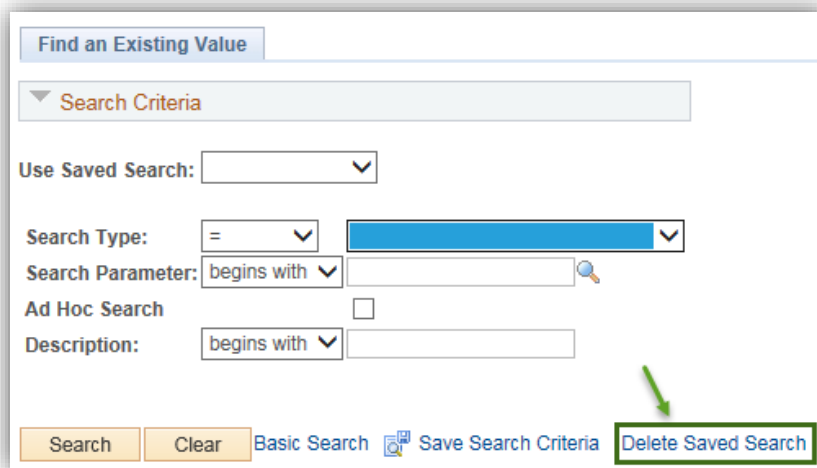
Click the **Delete Saved Search** button.

[Delete Saved Search](#)

Search Match

Create, Save & Delete

SA – Student Administration Basics



Find an Existing Value

Search Criteria

Use Saved Search:

Search Type: =

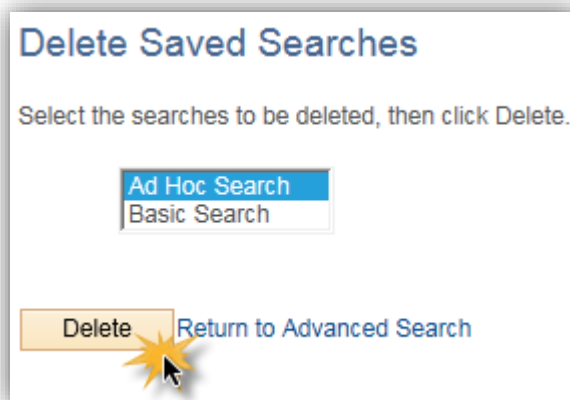
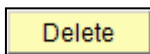
Search Parameter: begins with

Ad Hoc Search

Description: begins with

Search Clear Basic Search Save Search Criteria **Delete Saved Search**

2. A list of **Saved Search Criteria** will appear. Select the appropriate search for deletion. **Note:** the delete action is immediate. Click the **Delete** button.



Delete Saved Searches

Select the searches to be deleted, then click Delete.

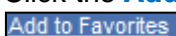
Ad Hoc Search
Basic Search

Delete Return to Advanced Search

Add to Favorites.

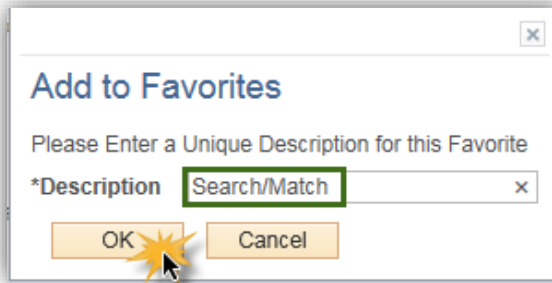
It is recommended that if Search/Match is used frequently, it should be Added to Favorites. The next steps will demonstrate how to add a component to the favorites.

1. Click the **Add to Favorites** link in the menu bar.



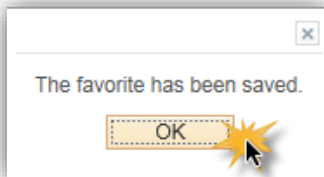
2. An Add to Favorites prompt will appear. A default description will appear to which you can modify if desired. Click the **OK** button.

OK



3. A confirmation window indicates the favorite has been saved. Click **OK**.

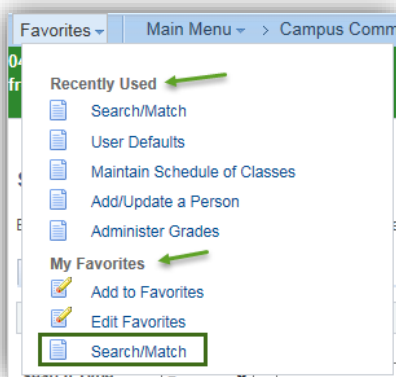
OK



4. To view a list of Favorites, click Favorites in the menu bar. Click the **Favorites** button.


Favorites

5. The Favorites menu will display a list of Favorites as well as a list of Recently Used navigation. Save time by clicking on Favorites and selecting the desired favorite.



Tip: Save any frequently used component in PeopleSoft to your favorites.

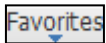
The Favorite Search/Match will appear in the menu with the description you created (eg. Your Name)

 Search/Match Your Name

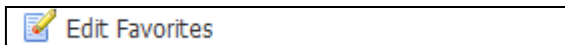
Editing Favorites Menu

The next steps explain how to remove an item from the **Favorites Menu**. **Tip:** You can modify the sequence (order) of the items saved on the Favorites Menu by changing the sequence number.

1. Click the **Favorites** button in the menu bar.

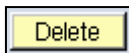


2. Click the **Edit Favorites** menu.

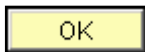


3. Any Favorites will be listed here.

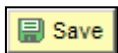
Click the **Delete row** button.



4. Click the **OK** button.



5. Click the **Save** button.



For the corresponding online learning, consult the Student and Enrolment Services, Student Administration (PeopleSoft Campus Solutions) training website.

End of Procedure.