

Search Standards



In PeopleSoft, there are several different ways that you can search for a record. To assist general users in finding the correct records, and to help data entry staff avoid entry of duplicate records, please follow these guidelines:

- Whenever possible, search for a person or organization by using their **ID number**. This will guarantee that you pull up the correct record.
- When **searching by name**, sometimes less is more. Try entering just a few letters of the first and last name and review the results list. This will allow you to locate the person even if you have the wrong spelling of the name, or if the name is incorrect or incomplete in PeopleSoft.
- Search Dialog boxes only search on the Primary Name. Use a **Global Search** to search all name types.
- Remember that people may use **nicknames** or more than one name. Try possible nicknames, maiden names, and married names. Again, remember that you are more likely to find a “tricky” name if you enter fewer letters.
- **Social Security number** (or National ID -- NID) is entered on many people in the system and should be a unique identifier (like their ID number), but keep in mind that not every record has a social security number. If you have the correct social security number and you don't get a result, try using a different search option.
- Use **wildcard searches** when you know only part of the information. This feature is available on many of the search panel fields. To do a wildcard search, use the percent symbol (%). For example, %bio% or T%. In most cases, number field (such as ID or Social Security Number) searches will find the numbers you enter if they are included in the full number (for example, %34% would pull up 123-34-9888). On name fields, wildcards will only search from the beginning of a name (for example, %ELS% only finds names starting with ELS).
- If you do a lot of searches during the day, it might be helpful to keep a window open with the search panel (you can open multiple windows with the “**Go-New Window**” navigation). You can also add the search panel to your **Favorites**.
- Before searching, **collect as much information as possible** to assist you in your search. For example, ask for an address or social security number to verify against, or ask alumni for a class year. If you have a letter or application in front of you, check to see if there is address information that might be helpful.
- When in a data entry panel, use **CTRL-F4** to pull up a search dialog box.

For more information, see Search Box options on the following pages.

If you have questions about this information, or if you have some of your own suggestions that you can share, please e-mail datatds@brynmawr.edu. Thank you!

Search Standards

SEARCH/MATCH (Global Search)

Go – Build Community – Maintain People Data – Inquire – Search/Match

Or access via the Search/Match button (the green flashlight) from various panels.

- Hit the eraser button to clear your search criteria.
- Hit the funnel button to execute the search.

Global Search will look for all name types.

Carry ID	Details	ID	Name Type	Eff Date	First Name	Last Name	National ID	Bir
35		0252410	Preferred	01/01/1901	Margery	Brown	030662853	08/
36		0252410	Primary	01/01/1901	Margery	Brown	030662853	08/
37		0017323	AV College	01/01/1901	Margot	Brown	560985625	09/
38		0025148	AV College	01/01/1901	Maria	Brown	162409729	11/
39		0025148	Preferred	01/01/1901	Maria	Brown	162409729	11/
40		0025148	Primary	01/01/1901	Maria	Brown	162409729	11/
41		0009431	AV College	01/01/1901	Marian	Brown		
42		0015523	AV College	01/01/1901	Marian	Brown	015386747	12/
43		0824094	Preferred	01/01/1901	Marian Careen	Brown		

SEARCH/MATCH RESULT

View the results. Scroll to the right to see all of the information. Depending on what is available, the following information is displayed for each matching record:

- ID
- Name Type
- Eff Date
- First Name
- Last Name
- National ID (Social Security Number)
- Birthdate
- Gender
- Current Relation*
- Campus ID (BMC does not use)

*The Current Relation columns indicate any current relationship the person has with BMC. Current relationship types are:

- L Alumni
- A Student Applicant
- E Employee
- F Financial Aid
- P Prospect
- S Student
- I Student Financials

- If you need to check a specific person's record, click the DETAILS (magnifying glass) button and it will take you to Bio/Demo Data.
- When you verify that you have the right person, click the CARRY ID button.

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Update/Display All -- Bio/Demo Data

EmpID: +

Campus ID:

National ID:

Last Name:

First Name:

ID	Name
0909902	Smith, Margaret
1099129	Smith, Margaret A.
1120031	Smith, Margaret A.
1130797	Smith, Margaret A.
0485101	Smith, Margareta E.
0022277	Smith, Margaret Becker
0008381	Smith, Margaret Cary
0737092	Smith, Margaret Cecilia
1012017	Smith, Margaret I.
0937919	Smith, Margaret K.
1090801	Smith, Margaret L.
0067634	Smith, Margaret M.
0221053	Smith, Margaret M.

Buttons: OK, Cancel, Search, Detail, Use Query, New Query

SEARCH DIALOG BOX

When you hit update/display or update/display all (the blue checkmark and check plus), a search dialog box appears.

For people searches, the following fields are present in all search box panels:

- EmplID
- National ID
- Campus ID
- Last Name
- First Name

Different or additional fields may be present depending on the type of data being retrieved.

When you enter data in the ID field or any of the other search box fields and select OK, the system searches for that record. PeopleSoft lists all of the rows with that data in the columns at the bottom of the panel.

If there are multiple people returned, scroll to the right to see additional information such as gender, birthdate, and social security number.

Search Dialog only searches on Primary Name.

Maintain People Data - Use A-K - Bio/Demo Data

File Edit View Go Favorites Use A-K Use L-Z Inquire Process Report Help

Bio/ Demo Data Addresses

ID: 0909902 Status: Non Employee Original Hire Date:

Effective Date: 01/01/1901

Name: Smith, Margaret Initials: Prefix:

Home Address Mailing Address

Country: USA United States

Buttons: Edit Mailing Address

SA76TST Bio/ Demo Data Update/Disple

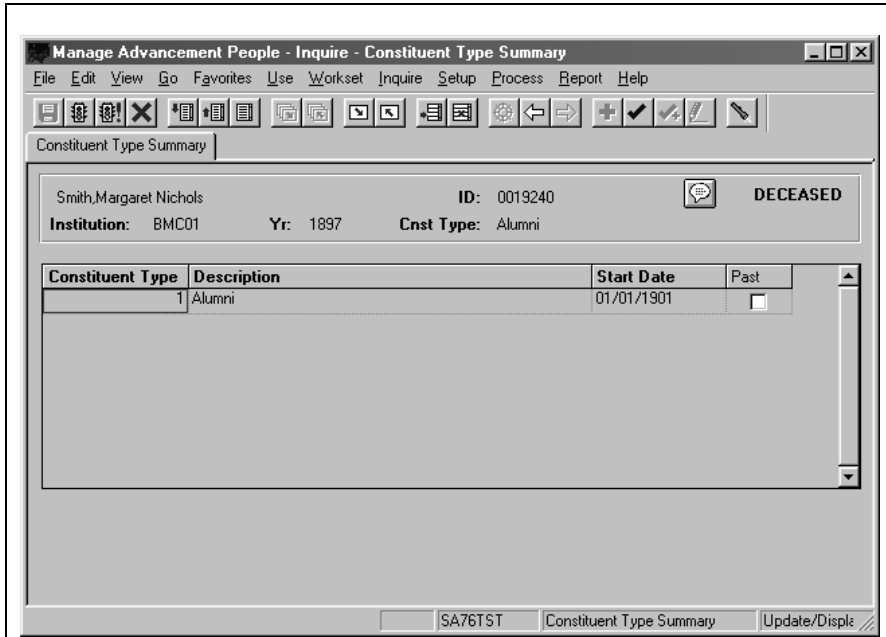
DETAIL INFORMATION – Example 1 (from a search dialog panel)

For more detailed information about your search results:

- Highlight the person on the list that you want to review.
- Click the “Detail” button on the right hand side of the panel.
- You will be able to view more detailed results (in this example, you would see address information, if available).
- You can use your Next in List, Previous in List, and List buttons to check the different people that were retrieved in your search.

**If it still is not clear that you are looking at the right person, conduct a global search to verify!

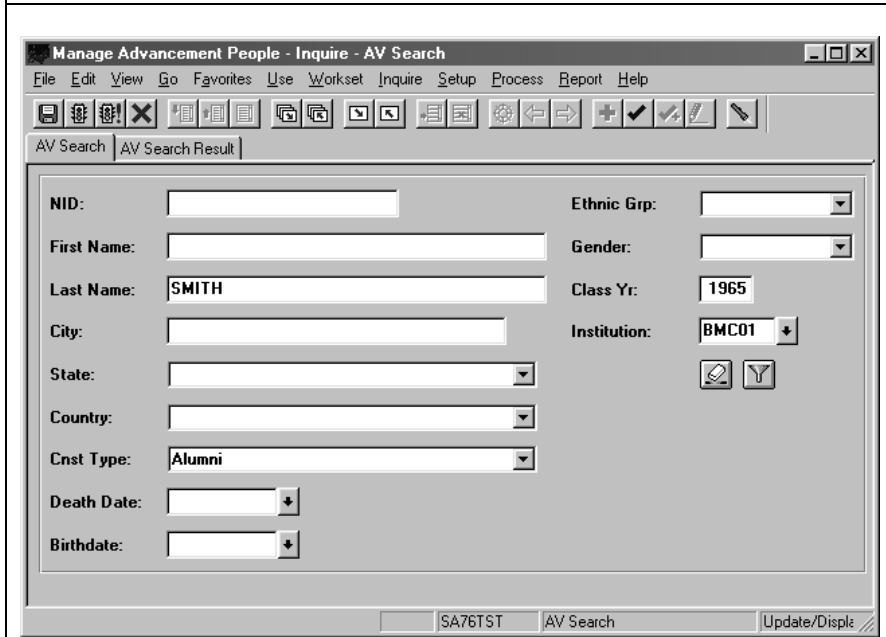
Search Standards



DETAIL INFORMATION – Example 2

In this example, the search box was requested in Manage Advancement People – Inquire – Constituent Type Summary.

- When a person is selected and “Detail” is clicked, it displays the constituent type summary.
- **Remember, different search dialog boxes will display different “detail” information.**
- The Next in List, Previous in List, and List buttons can be used to review other results.



ADVANCEMENT SEARCH

Go – Manage Advancement – Manage Advancement People – Inquire – AV Search

- Enter name information. **Constituent Type** (Cnst Type) and **Class Year** are also particularly helpful to guarantee that you find the right person.
- Hit the eraser button to clear your search criteria.
- Hit the funnel button to execute the search.

Review the AV Search Results.