



Advanced Searches

Advanced Searches

Advanced searches are a custom search using multiple contract record field inputs or variables. Users can build complex searches using multiple filters of different types and Boolean expressions.

For example, you can create a search that will show you only Internship agreements (contract type) that are Active (status) in your department (contract department) and were executed in the past year, and save the search to access it in the future.

Access the Advanced Search Feature

- **Hover** your cursor over the down arrow next to the Search magnifying glass on the table toolbar so the Search menu appears
- Select **“New”** to open the Search Wizard

The screenshot shows a search interface with a search bar containing '-TEXT-' and a 'Go' button. Below the search bar are buttons for 'Show All', 'Refine', 'String', 'Context', 'Active Only', and 'More Options'. Below this is a table of contracts with columns: Edit, ID, Contract Type, Status, Contract Title, Contracting Party, Renewal Type, and Cont Start. A toolbar above the table includes 'New', 'Actions', 'Views', and 'Search'. A red box highlights the search magnifying glass icon, which has opened a dropdown menu with options: Collapse Search Options, Help, New ... (highlighted), Edit ..., Manage ..., Show All, Active Contract expiring withi..., ALL Active Department Contract..., ALL Contract Amendments, Contracts with an in progress ..., Drafts, My Contracts, My Drafts, Test, and Unit Contract Summary by Date.

Edit	ID	Contract Type	Status	Contract Title	Contracting Party	Renewal Type	Cont Start
	2024	Service	Active	Testing Renewal Reminder Email - Manual	Whatcom Stables	Manual Renewal	03/0
	2023	Service	Active	Testing Renewal Reminder Email - Automatic	Pozie by Natalie	Automatic Renewal	06/0
	2021	Internships	Draft	Rehab Counseling Internship	PeaceHealth St. Joseph Medical Center	Manual Renewal	09/0
	2016	Internships	Submitted for Review	Affiliation agreement with Star Trek Infirmary	Star Trek	Automatic Renewal	08/0
	2015	Service	Draft	Test Contract	Bellingham Tennis Club	None	08/1
	2014	Contract for WWU...	Submitted for Review	Private Jet Service	NetJets	Manual Renewal	08/0
	2013	Service	Pending Approval	Consultant and Surveying Services for Radiation Safety	Thomas W Clynes	Automatic Renewal	08/02/2018 08/29/2019

Setting up the Search

- The first tab, **General**, contains the search options and filters.
 - Available filters:
 - **Simple:** Provides the same search capability as the Quick Search finding specific field values
 - **Time:** Search on period of elapsed time relative to a specific field
 - **Calendar:** Searches using specified calendar periods (minute, hour, day, week, month, quarter, year) to measure time
 - Example: “Contract End Date” → “Less Than” → “Next 2” → “Months”
 - **Advanced:** Use to measure field value changes within a certain period of time
 - Example: “Status” → in the “last 1 week” → changed from “Submitted

for Signature” to “Signed” or “Active”

- **Related Table:** incorporate an existing saved search from another table using linked fields
 - Example: “Approvals needed” → “contains” → records that match the saved search: “My Pending Approvals”
 - **Run-time:** Build a complex search with the flexibility of entering a variable at the time of running the search
 - Example: “Contract Type” → “equals” → “Internships” and “Status” → “equals” → “Active” and “Submitter Department Title” → “equals” → “Dept Communication Science Disorders (CSD)” and “Contracting Party City” → “equals” → [User enters data at run-time]
 - In this example, the constant search variable uses the Simple filters to search across all active internship contracts for potential internship sites for Dept Communication Science Disorders (CSD), while the city is entered upon running the search
 - **Duplicate:** Add this filter to show records that have more than one record fulfilling the criteria (used to identify duplicate records that can be deleted)
 - **First/Last:** Add this filter to show the first or last N records whose selected fields have a unique combination of values
 - Example: Searching for the last N revenue contracts
- Click the green filter button to make the search bar appear
 - Filters can be used in combination
 - To delete a filter criteria, click the trash can icon on the right side of the row
 - Boolean expressions and parenthesis can be used to group complex criteria

The screenshot shows the 'Add Filters' interface with the following elements:

- Navigation tabs: Simple, Time, Calendar, Advanced, Related Table, Run-Time, Duplicate, First/Last. The 'Simple' tab is selected.
- Buttons: Clear Filters (top right), Next, Finish, Cancel (bottom).
- Filter rows:
 - Row 1: () dropdown, Status, equals, =, Value, Active, now checkbox, trash icon.
 - Row 2: or dropdown, Status, equals, =, Value, Active Pending Pmt Method Confirmation, now checkbox, trash icon.
 - Row 3: or dropdown, Status, equals, =, Value, Amended, now checkbox, trash icon.
 - Row 4: and dropdown, () dropdown, Contract End Date, is greater than, >, next, Month, now checkbox, trash icon. Subtext: Using KB time [16:23] User time [16:23].
 - Row 5: and dropdown, Contract End Date, is less than or equals, <=, next 2, Month, now checkbox, trash icon. Subtext: Using KB time [16:23] User time [16:23].
- Red boxes highlight the opening parenthesis dropdowns in the first, third, and fourth rows, and the closing parenthesis dropdown in the third row.

- Click “Next” to move on to the next tab
- The second tab, **Sorting**, dictates how the results will be displayed
 - Select up to five fields to sort the results
 - Sorting is applied in the order selected (first sort, second sort, third sort)
 - Use the drop down menu to select the field

- Choose to display in “**Ascending**” or “**Descending**” order
 - For example: first sort by contract end date in ascending order (starting from the first of the month), then sort by Submitter name in ascending order (alphabetically)
- If you **do not want to save** the search, it can now run by clicking the “**Finish**” button
- Otherwise, click “**Next**” to save or see additional options
- On the third tab, Options, you can save your search and fine tune the results
 - To use the search repeatedly, select “**Yes**”, and give the search a **Name** and **Label** (required) and a description (optional)

Save Search

Yes

*Name

*Label

Description

Save as new saved search

No

- Decide if you want the search to look in subtables, include synonyms, or show context
- The default selection is to “**leave the view unchanged**” when running the search, but a specific view can be selected in the dropdown menu

When the search is run:

Leave the view unchanged

Change the view to

For the found records:

Minimum of the

Minimum of the

Minimum of the

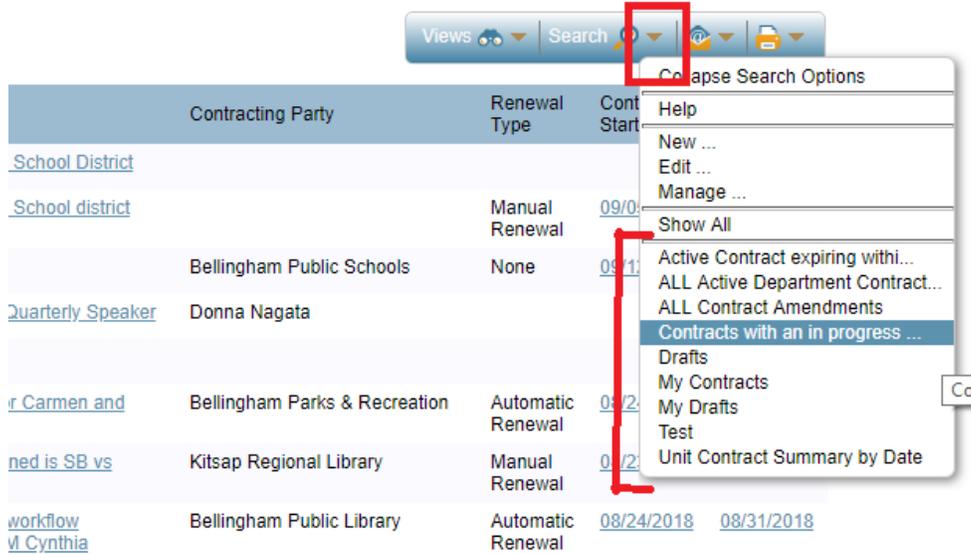
- Click “**Finish**” to run

Accessing a Saved Advanced Search

The search will run immediately after it is first created, but saved searches can be accessed and run as needed.

- From the contracts table (My Contracts or WWU Contracts), hover the cursor over the down arrow by the Search magnifying glass icon

- Saved searches will be in the list underneath **“Show All”**



- Select the search to run

Editing a Search

Saved searches can be edited at any time. You can also edit an existing search and save it as a new saved search (on the Options tab).

- Select the saved search as instructed above
- Once run, hover again over the down arrow and select **“Edit...”**



Managing Saved Searches

Saved searches can be removed from the search list or permanently deleted.

- From the contracts table (My Contracts or WWU Contracts), hover the cursor over the down

arrow by the Search magnifying glass icon

- Select **“Manage...”**
- The saved search table will open showing the following columns:
 - **Check box** selection
 - To permanently delete a search, select with the check box and click **“Delete”** on the top left of the table
 - **Edit** icon to open the Search wizard
 - Saved search name
 - Description if given
 - Search filters applied
 - **Active**
 - Deselect if you no longer want the search to appear on the saved search list, but do not want to delete it permanently
 - The **“Show in Left Pane”** and **“Show in My Assigned”** selections are not applicable to portal users

Save and Close Cancel

Saved Searches

Status: 12 record(s) found, 2 page(s).

Page: [Page 1] Next Last Go to page Go

Delete

Views

Edit	ID	Name ↑	Description	Filter	Active	Show in Left Pane	Show in My Assigned
	51238	Active Contract expiring within next 90 days (C)		Status='Active' and Contract End Date<=90 day in the future	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	51294	ALL Active Department Contracts	ALL Contracts on system	Status='Active'	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	51293	ALL Contract Amendments	ALL Contract Amendments	Record Type='Amendment Manual'	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	54180	Contract Department is My Department		Contract Department ID=142 and Contract Department ID=NULL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	51239	Contracts with an in progress Status (C)	draft, pending approval, approved or signed	Status='Draft' or Status='Pending Approval' or Status='Approved Pending Signature' or Status='Signed'	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	51212	Drafts	Status equals Draft	Status='Draft'	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	51213	My Contracts	Show all Active Contracts from all users	Contract Administrator='Sally Test1' or Created By='Sally Test1' or Submitter Name='Sally Test1'	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	51216	My Drafts		Status='Draft' and Contract Administrator='Patricia Kowenowski'	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	51228	R: Updates by Vendor or Customer Team		Updater Team~='Vendor Team' or Updater Team~='Customer Team'	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	51252	Record Type is Contract (CF)	used in Contracts related table in contracts	Record Type='Contract'	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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