Advanced Searches

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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

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
- o Click the green filter button to make the search bar appear
- o Filters can be used in combination
- o To delete a filter criteria, click the trash can icon on the right side of the row
- o Boolean expressions and parenthesis can be used to group complex criteria

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

- o 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)
  - o If you **do not want to save** the search, it can now run by clicking the "**Finish**" button
  - o Otherwise, click "**Next**" to save or see additional options
- On the third tab, Options, you can save your search and fine tune the results
  - o To use the search repeatedly, select "**Yes**", and give the search a **Name** and **Label** (required) and a description (optional)

Save Search

◉ Yes

*Name   Contracts expiring in two months

*Label   Contracts expiring in two months

Description

☐ Save as new saved search

◯ No

- o Decide if you want the search to look in subtables, include synonyms, or show context
- o 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 Detail View

    Customer contract in other table
For the found recc Default View
    Detail View
☐ Minimum ▼ of the Export Control View
☐ Minimum ▼ of the Home page view
☐ Minimum ▼ of the Mobile view
    Report View
   Summary view
    Unit Contract Summary Report

- o 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**"
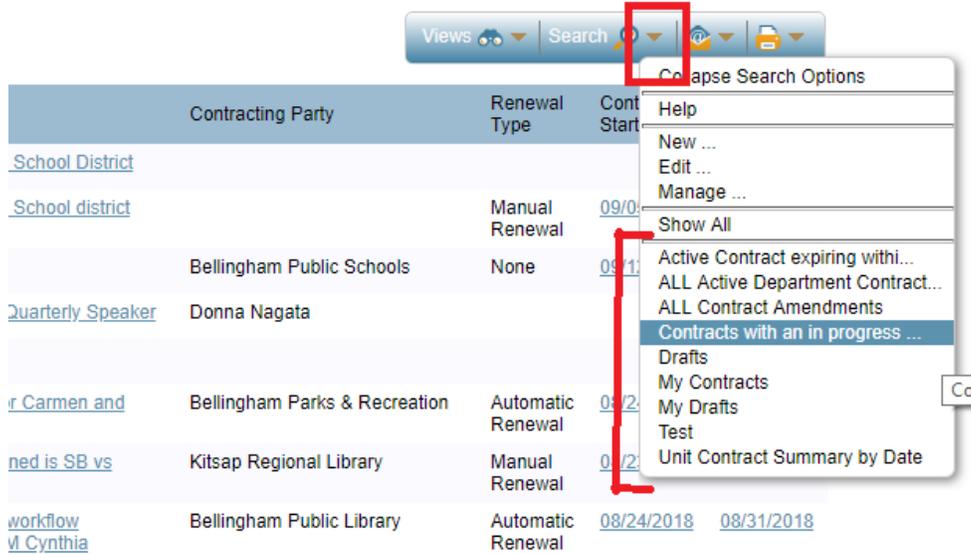
- Select the search to run

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