Search/Match for Campus Community

Description

Search/Match is a powerful tool for locating people and organizations in the Campus Solutions database. Admissions and Recruiting staff must use it prior to adding new prospect or application data, to determine whether the person is already in the database. Staff with Campus Community roles may be able to use Search/Match to verify the identity of someone or find someone’s emplid.

Navigation: Campus Community > Personal Information (Student) > Search/Match
Campus Community > Personal Information > Search/Match
Student Recruiting > Maintain Prospects > Search/Match
Student Recruiting > Student Recruiters > Search/Match
Student Admissions > Application Entry > Search/Match

Following any of the above navigations will bring up the Search/Match Search page. There are two fields that must be filled in: Search Type and Search Parameter. We do not use the Ad Hoc Search checkbox or the Description field.

The Search Type field has three choices: Applicant, Person and Organization. Use Person to search for a person in the database. Use Organization to search for codes for high schools, colleges, etc. Do not use the Applicant choice.

NOTE: To locate a person in the database always use the Search Type of Person. The Applicant Search Type is for HR use only.

Because you will be using Search/Match often, you should save these search parameters so you won’t have to enter them each time. To do this, fill in the Search Type: Person and Search Parameter: UMS_ONLINE and click on the Save Search Criteria link.
This brings up a page where you supply a label for your saved parameters. In the example below, the label chosen is “PersonSearch.”

In the **Name of Search** box, enter the label you have chosen. Click **Save**. You see:

Click **Return to Advanced Search** to return to the Search/Match page.
As you can see (above), the name chosen for the saved search criteria is displayed in the **Use Saved Search** box. Next time you do Search/Match, select your saved search and your parameters will be filled in automatically, saving a few mouse clicks.

Click on the **Search** button. This brings up the Search Criteria page:

Now you must select a Search Result Code. You should set a User Default so you don’t have to enter this each time. To do this, click on the **User Default** link.
Click on the magnifying glass to bring up a list of Search Results Codes. Select UMS_PERS_RESULTS. Click OK. From now on, this value will be selected automatically as your Search Result Code.

Now you are ready to perform a Search/Match.

There are four search fields: National ID (e.g. social security number), Date of Birth, Last Name and First Name.

Do not use the lookup buttons to the right of these fields!

The searches that can be performed are: National ID only, Date of Birth and Last Name, Date of Birth and First Name, First Name-Last Name and Last Name only. Only the first three characters of the Last and First names are used in searches. After typing in data in a
field, press the TAB key to signal to the system that the data is entered. You will see that the TAB is recognized because names will convert to all upper case.

Normally, you would not use the National ID field to locate a person. If the person does not have a National ID recorded in the database, searching on National ID will not locate the person, even though he/she is really present. However, see below for a special case.

Here is an example of search criteria using the first and last names:

Once you have entered your search parameters, hitting TAB after each entry, you can perform the search in either of two ways: search or selective search. The regular search is performed by clicking the button above the Search Criteria. If you have entered all or part of a person’s first and last names, clicking the Search button will first do a full name search. If that fails, it will do a last name only search. If you filled in all four fields, the button will do the NID only search. If that fails, it will do Date of Birth and Last Name. If that fails, it will do Date of Birth and First Name.
Failing that, it does full Name, and finally, failing that it will do a Last Name Only search – in other words, it performs all possible searches in order, depending on what criteria have been entered.)

**Warning:** If the last name is a very common one (Smith, Johnson, Lee, Li), a Last Name Only search will take a long time and produce hundreds or even thousands of “hits.” A sample Last Name search using Li found over 3,000 people of whom only about 70 actually had last name Li. This is because name searches match the first 3 letters, and the Li search found all the Libbys, L’Italiens, and so on.

To see the **Selective Search** buttons, scroll down. In the example shown above, where both a first and last name have been entered, you can select the full **Name Only** selective search or the **Last Name Only** search. If the last name is a common one, a full name selective search may be better than using the **Search** button.

When the search is complete, you will either see a message that no matches were found:

![Search Criteria did not return any results](image)

Or you will get a list of matches. Remember that only the first 3 characters of the names are used in the search. You will probably get multiple lines for each person found because the search includes all the name types such as Primary, Preferred, Diploma, etc. Also if the person has changed marital status or gender, there will be multiple entries due to the changes. However, by looking at the emplid column, you can determine which “hits” are simply multiples of the same person.

In the example below, the search was for Charlotte Czerny (a selective full name search). Charlotte was found, but also several others whose last names began “Cze” and whose first names began “Cha.” A total of 4 individuals was found (4 different emplids), but the total number of lines in the search results was a lot more (12) because of duplicate entries.
The search results are ordered by emplid (the people in the examples are fake). If you click the title of one of the other columns, the results will be sorted alphabetically by that column. This can help you locate the right person if you get a long list of search results. If there is a long list, the system will display the first 20. To see the rest, a page at a time, click the small triangle in the dark blue Search Results bar:

Click the Detail link to view biodemo data for the person on that line. Click the Carry ID button to save the person’s emplid in a temporary storage area for use on other pages of the system.

To clear a “carried” ID, click Return to Search Criteria to return to the Search Criteria page.
Click the **Carry ID Reset** button to clear out any emplid that you have saved via the Carry ID button.

**Special Case**: If you need to see all the name variations a person has had, a name search may not display them all. But a National ID search will (assuming the person has his/her NID stored in the database).