|  |  |
| --- | --- |
| There are two ways to search in Direct Input; a simple **Name search** or an **Advanced Search**.  You can also save your search when you use Advanced Search, making finding information even easier. |  |

## Carrying out a Name search

|  |  |
| --- | --- |
| * To search on someone’s surname, click in the **Name field**. * Type in the person you are searching for. * Click on the **Go button**. |  |
|  | |
| Any records found will be displayed in the bottom of the screen. You can now add selected ones to **My List** to be able to find them again quickly or just click on the **Action button** to update a record.  **IMPORTANT NOTE:** when you search, records will only be returned for cost centres you have permission to. For example, if you search on Smith, you will only see Smith records for your own cost centres. | |

## Carrying out an Advanced Search

|  |  |
| --- | --- |
| * Click on the **Advanced Search** link. |  |
|  | |
| * The **Advanced Search** screen will be launched. You now need to enter some search criteria. | |
| * Select a condition. * **Show table data when all conditions are met** – only records that match ALL the fields will be returned. (Example – First Name = John, Last Name = Smith. Only records for John Smith will be returned. * **Show table data when any condition is met** – records matching any of the fields will be returned. (Example – First name = John, Last Name = Smith. Records for any John and any Smith will be returned. |  |

|  |  |  |
| --- | --- | --- |
| * Complete at least one search field.   **Note**: these fields are case sensitive and require a capital first letter.   * Select a search criteria from the drop down list if required. * The Organization field should contain your Cost Centre Code. |  | |
| * More search fields can be added if required, by adding them from the **Add Another** list.   **TIP:** Email Address is often a good one to add as each address is unique.   * Once all search criteria has been added, click on the **Go button**. |  | |
|  | |
| Any records found will be displayed in the bottom of the screen. You can now add selected ones to **My List** to be able to find them again quickly or just click on the **Action button** to update a record.  **IMPORTANT NOTE:** when you search, records will only be returned for cost centres you have permission to. For example, if you search on Smith, you will only see Smith records for your own cost centres. | |

## Saving a Search

|  |  |
| --- | --- |
| * Once you have a completed a useful search you may want to use again (most probably a search for a whole cost centre). * Click on the **Save Search button**. |  |
| * Saved searches are called Views. * Give your new ‘View’ a name. * Select the number of rows you wish to view when you run the new view. * Tick the Set as Default checkbox ONLY IF you want this to be your default search each time you go into Advanced Search. * Give your view a description. |  |
| * Add or remove columns from the final search in the **Column Properties** section of the form. * You can also rename your columns here by using the **Rename Columns/Totaling button**. |  |
| * Add sort options to columns as required in the **Sort Settings** section. |  |
| * Select a condition (if required). * **Show table data when all conditions are met** – only records that match ALL the fields will be returned. (Example – First Name = John, Last Name = Smith. Only records for John Smith will be returned. * **Show table data when any condition is met** – records matching any of the fields will be returned. (Example – First name = John, Last Name = Smith. Records for any John and any Smith will be returned. |  |
| * Use the **Apply button** to save your new view. * Use the **Apply and View Results button** to save your view and see what it looks like. * Use the **Revert button** to wipe any changes you have made to your view and start again. * Use the **Cancel button** to cancel out of saving the view. |  |
|  | |
| * If you select **Apply**, the Personalize Views screen will appear. * Click on the **Home link** at the top right of the Oracle screen to return to the Home screen. | |
|  | |
| * If you select **Apply and View Results** the screen above will appear. * Again, click on the Home link to get back to the Oracle Home Page. | |

## Finding and Using Views

|  |  |
| --- | --- |
| * In the Advanced Search window, click on the **View button** to find your saved Views. |  |
| * Click on the **drop down arrow** for the View field. * Select the view you want to use. |  |
| * Click the **Go button** to run the view. * Click the **Personalize button** to make any changes to the view. |  |