

Managing Data Entry and Searches

A number of search screens in AgLearn make it easy to find data by applying a search filter. Search filters can be created to suit any eventuality by adding or removing search criteria at will. Most administrators will find a regular set of search criteria that meets their most common needs, and will make only occasional changes for special circumstances.

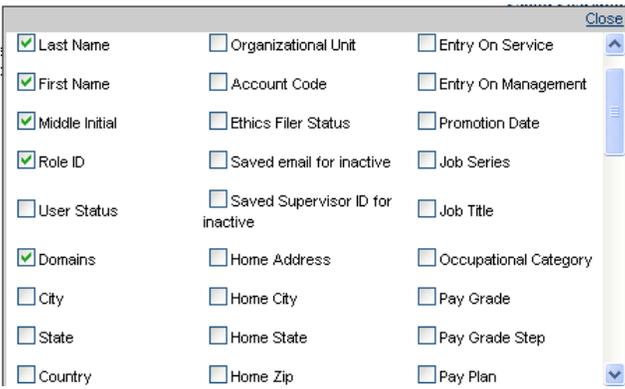
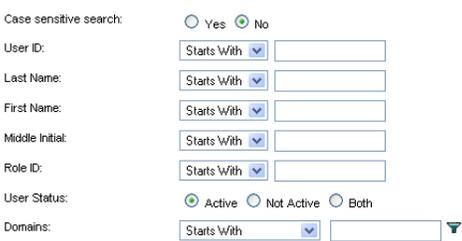
Search-specific tasks include the following: **Personalize a Search, Perform a Search, Personalize Search Results, Save a Search, Execute a Saved Search, Perform a Select or Add From List Search, Select and Enter a Date via the Calendar Icon and Perform a Selection via the Selection Icon.**

A Day-in-the-Life Scenario

You need to be able to find all users whose last names begin with the letter “S.” You also need to know how many users reside in a specific domain.

Adding/Removing Search Criteria

The search screen is available on many menus. The User Management menu is being used for illustration purposes.

Step	Activity	View
1.	Select the User Management menu.	
2.	Click the Expand icon next to Add/Remove Criteria	Add/Remove Criteria 
3.	Check (or uncheck) the boxes for the criteria you want to use.	
4.	Click Submit Query .	
5.	The options you selected will appear for subsequent searches.	

Notes

The **Simple Search** screen opens when some left hand menu items are selected.

Performing a Search

Step Activity View

1. Select the **User Management** menu.
Note: The search screen is available on many menus. The **User Management** menu is being used for illustration purposes.

User Management

2. Enter and/or select the basic search criteria as appropriate.
Note: The data fields may be left blank to select from an entire list.

User ID: Starts With

Last Name: Starts With

First Name: Starts With

Middle Initial: Starts With

Role ID: Starts With

User Status: Active Not Active Both

Domains: Starts With

Add/Remove Criteria

3. Click **Search**.

Search

4. Review search results.

Records per Page 10 (10 total records)

User ID	User Name	Domain ID	Supervisor	Notify
ATZ198478	Test10, Aglearn	OCIO	WWZ36877	<input type="checkbox"/>
ATZ208478	Test11, Aglearn	OCIO	MC117069	<input type="checkbox"/>
ATZ218478	Test12, Aglearn	OCIO		<input type="checkbox"/>
ATZ228478	Test13, Aglearn	OCIO	SB347882	<input type="checkbox"/>
ATZ238478	Test14, Aglearn	OCIO	ATZ248478	<input type="checkbox"/>
ATZ248478	Test15, Aglearn	OCIO		<input type="checkbox"/>
ATZ18478	Test16, Aglearn	OCIO	ATZ28478	<input type="checkbox"/>
AT998478	Test17, Aglearn	OCIO	ATZ28478	<input type="checkbox"/>
ATZ28478	Test18, Aglearn	OCIO		<input type="checkbox"/>
ATZ38478	Test19, Aglearn	OCIO	ATZ68478	<input type="checkbox"/>

Records per Page 10 (10 total records)

To go to a specific page number, enter the desired number in the Page field and then click **Go**.

5. If necessary, select the **Next Page** link to go to the next page of results.

Records per Page 5 Page: 1 2 3 4 5 «Previous | Next» (37 total records) Page 1 of 8 Go

User ID	User Name	Domain ID	Supervisor	Notify
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6. Select **All** from the **Records per Page** drop-down list to display every record in the results.

Records per Page 5

User ID

- 5
- 10
- 25
- 50
- All

Not all action icons associated with records in a search results screen may be displayed. The displayed actions are determined by the permissions given to the assigned role.

7. Select the **View**, or **Edit**, icon to perform the desired action.

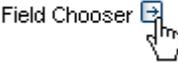
User ID	Action Icons
DK997165	<input type="checkbox"/> <input type="checkbox"/>
DKZ37165	<input type="checkbox"/> <input type="checkbox"/>

Notes

Customizing Search Results

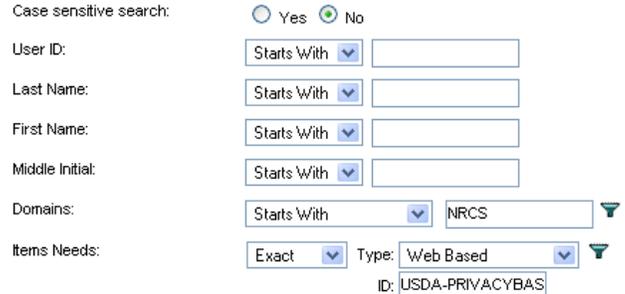
Once search results are displayed, you can add additional fields to be displayed on the search results screen.

The search screen is available on many menus. The User Management menu is being used for illustration purposes.

Step	Activity	View
1.	Select the User Management menu.	
2.	Click the Expand icon next to Add/Remove Criteria .	
3.	Check (or uncheck) the criteria you would like to see displayed for your subsequent search results.	
4.	Click Submit to see the search results with the additional fields.	

Saving a Search

The search screen is available on many menus. The User Management menu is being used for illustration purposes.

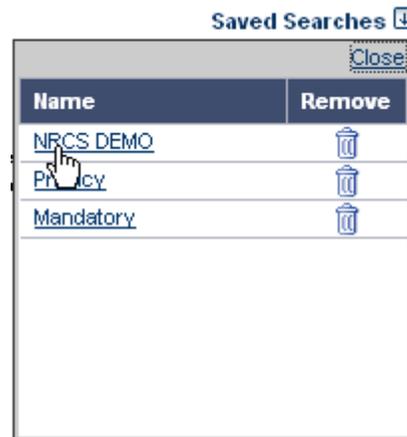
Step	Activity	View
1.	Select the User Management menu.	
2.	Fill in your search parameters.	 <p>Case sensitive search: <input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>User ID: Starts With <input type="text"/></p> <p>Last Name: Starts With <input type="text"/></p> <p>First Name: Starts With <input type="text"/></p> <p>Middle Initial: Starts With <input type="text"/></p> <p>Domains: Starts With <input type="text"/> NRCS <input type="button" value="Filter"/></p> <p>Items Needs: Exact <input type="text"/> Type: Web Based <input type="button" value="Filter"/> ID: USDA-PRIVACYBAS</p>
3.	Click Save As .	
4.	Enter a Saved Search ID and description.	<p>* = Required Fields</p> <p>* Saved Search ID: <input type="text"/></p> <p>Description: <input type="text"/></p> 
5.	Click Submit .	

Executing a Saved Search

The search screen is available on many menus. The User Management menu is being used for illustration purposes.

Step	Activity	View
1.	Select the User Management menu.	
2.	Click the More Options icon next to Saved Searches .	

3. Select the saved Search you want to open.



4. The **Search** form appears, with the saved parameters already filled in. Edit as needed.

Case sensitive search: Yes No

User ID: Starts With

Last Name: Starts With

First Name: Starts With

Middle Initial: Starts With

Domains: Starts With

Items Needs: Exact Type:
ID:

5. If you want to save any edits for future searches, click **Save**, or click **Save As** to save them under a different name.

6. Click **Search**.

Performing a Select from List Search

Notes

The Select from list search is available on other screens. The Items screen is being used for illustration purposes.

The **List** link enables you to add criteria to the search filter.

The **select from list** link allows the user to select more than one result. The **selection** icon presents a list from which only one result may be selected.

At this point you can remove filter records if you wish by selecting the **Remove** check box.

Step Activity View

1. Select the **Learning** menu.

Learning

2. Select **Items**.

Items
Scheduled Offerings
Classes

3. Select the **Select from List** icon, or search for the **Item Type**.

Item Types:

Starts With



4. Select the **Select** or **Add** check box next to the record(s) requested.

Records per Page: 10 Page: 1 of 2 «Previous | Next» (11 total records) Page 1 of 2 Go
[Select All](#) / [Deselect All](#)

ID	Description	Select
Assessment	Assessment	<input type="checkbox"/>
Briefing	Briefing	<input type="checkbox"/>
Certification	Certification	<input type="checkbox"/>
Course	Course	<input type="checkbox"/>
Document	Document	<input type="checkbox"/>

5. Click **Submit Selection**.

Submit Selection

6. Verify the selection and click **Submit Filter**.

Submit Filter

Remove Checked IDs

Reset

[Select All](#) / [Deselect All](#)

ID	Description	Remove
Assessment	Assessment	<input type="checkbox"/>
Briefing	Briefing	<input type="checkbox"/>

[Select All](#) / [Deselect All](#)

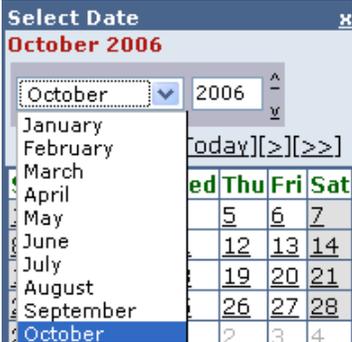
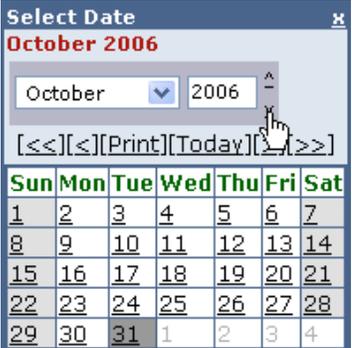
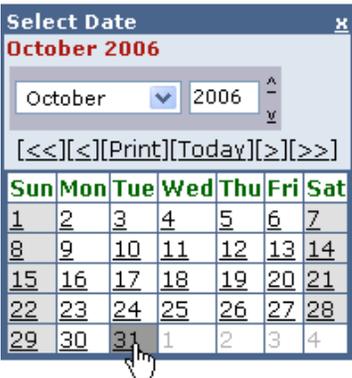
Notes

The Calendar icon is available on many screens. The Scheduled Offerings screen is being used for illustration purposes.

Using the **Calendar** icon prevents date formatting errors.

You can also click on the > and >> symbols to change the month and year.

Selecting and Entering a Date via the Calendar Icon

Step	Activity	View
1.	Select the Learning menu.	
2.	Select Scheduled Offerings .	
3.	Click the Calendar icon next to the desired field.	Start Date After: (MM/DD/YYYY)  <input type="text"/>
4.	Select the month from the drop-down list.	
8.	Click the increase or decrease buttons to change the year's display forward or backward.	
9.	Select the desired date to enter the date and close the Select Date window. Tip: Select the Today link to set the date to the current day.	
10.	Verify that the selected date appears in the Date field.	Start Date After: (MM/DD/YYYY)  <input type="text" value="10/31/2006"/>

Notes

The Selection icon is available on many screens. The Items screen is being used for illustration purposes.

Clicking the **Selection** icon will open a new Search window.

Leave any search fields blank to select from the entire list.

Click **Next** to move to additional pages of results or select **All** from the Results per Page drop down list to display all the results on the screen.

When the link is selected, the results window closes and the data is automatically entered into the field.

Performing a Selection When Only One Option May be Chosen

Step	Activity	View
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1.	Select the Learning menu.	
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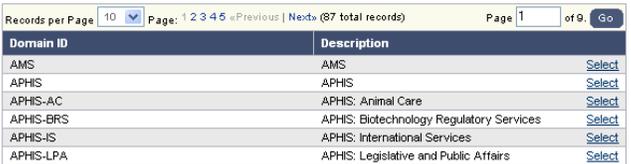
2.	Select Items .	
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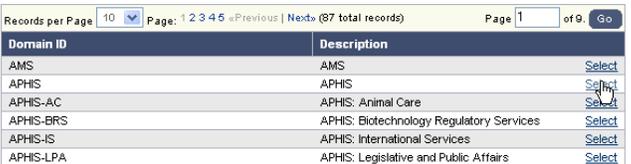
3.	Select the Add New link.	
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4.	Click the Search icon next to the desired field to open a new Pick window.	
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5.	Enter or select the search criteria as appropriate.	Case sensitive search: <input type="radio"/> Yes <input checked="" type="radio"/> No Domain ID: <input type="text" value="Starts With"/> <input type="text"/> Description: <input type="text" value="Starts With"/> <input type="text"/>
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6.	Click Search .	
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7.	Review search results.	
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8.	Select the Select link of the record to be used for data entry.	
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9.	Verify that the selected data has been placed in the field.	
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