PeopleAdmin Searches/Saved Searches

- The search/filter criteria is a powerful tool to help narrow the results of your search.
- Users have the ability to save searches per position type for:

    Postings,

    Applicants,

    Hiring proposals.

Navigating to Searches

First, from the PeopleAdmin Home page select the employee type under **Postings**:

After selecting the posting type based on employee, select **More Search Options**:

There are two types of **Saved Searches**: Global and Personal. **Global searches** are set up in the system at the administrator level and cannot be changed by users. **Personal searches** are created by users based on individual needs.

In this example, *Permanent Staff (EHRA NF)* Postings was selected as the posting type:
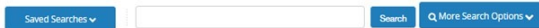

While you are unable to change the Global Search view, you can use these views as a starting point to create Personal Searches to refine views in postings, applicants, and hiring proposals.
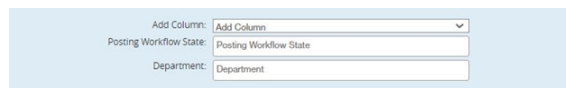
To Create Personal Searches

On Postings:

First select the employee type under **Postings**, then select **More Search Options:**

Then additional selections are available:

- **Add Column** provides a drop-down selection of fields from the Posting. Select a field to add this information to the results. You can add as many columns as you would like.
- **Posting Workflow State** filters the results to only show the requested data.
- **Department** filters the results to only show that department. Use a selection with the corresponding department number at the end.
- For refining the view and once you have added columns, you can change the order, delete, and select the column to sort by. To do this, hover over the column to see the options available.


  Use the left and right arrows to move a column. Use the **X** icon to delete a column. Determine a sort by using the up (descending) and down (ascending) arrows to sort the data.
- **Note**: you can only have one active sort at a time. Also, once a new column is added or a filter is applied, the sort defaults to be based on Vacancy ID. For this reason, it's recommended to apply filters and add/delete/move columns first, and then sort.

Once you have refined the options, then you can save by selecting, **Save this Search?**

In this example, *Permanent Staff (EHRA NF) Postings* was used.
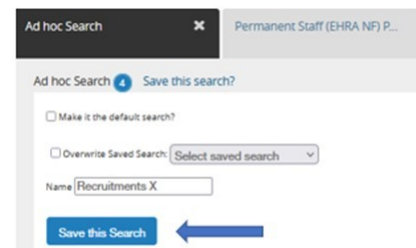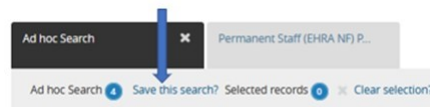
You will have the option to set as your default or leave the field blank to continue to use the Global Search as the default. Add a name that helps you identify the search criteria you selected, or you can overwrite an existing Personal Search if you have one by checking the box and selecting it from the drop down. Then select **Save this Search.**
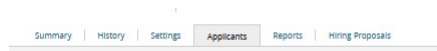
After saving, you can select the Personal Search by the name you entered using the dropdown under Saved Searches.
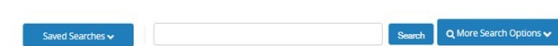
To Create Personal Searches

On Applicants on a Posting:

Similar to a Personal Saved Search at the posting level, you can set up searches at the applicant level and you will have the same filter/sort functionality and ability when saving to set as default or overwrite an existing Personal Saved Search.
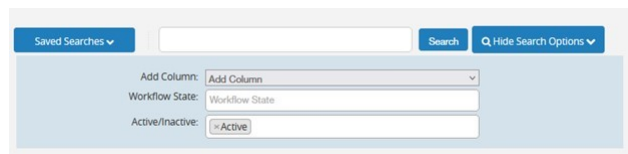
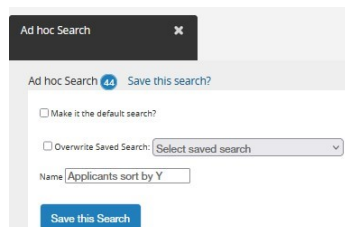First navigate to the **Applicants** tab in a posting:

Summary | History | Settings | Applicants | Reports | Hiring Proposals

Then select **More Search Options:**

Saved Searches ⌄ | | Search | Q More Search Options ⌄

Then additional selections are available:

Saved Searches ⌄ | | Search | Q Hide Search Options ⌄
Add Column: Add Column
Workflow State: Workflow State
Active/Inactive: ×Active

- **Add Column** and **Workflow State** filters will work the same as described under the Postings section.
- **Active/Inactive** can be used to filter Active applicants on the posting, or Inactive will display eliminated applicants.
- For refining the view and once you have added columns, you can change the order, delete, and select the column to sort by using the functionality described under the Postings section.

After saving, you can select the Personal Search by the name you entered using the dropdown under Saved Searches.

Ad hoc Search ✖
Ad hoc Search (i) Save this search?
☐ Make it the default search?
☐ Overwrite Saved Search: Select saved search ⌄
Name Applicants sort by Y
Save this Search

On Hiring Proposals:

Similar to a Personal Saved Search at the posting and applicant level, you can set up searches on Hiring Proposals and you will have the same filter/sort functionality and ability when saving to set as default or overwrite an existing Personal Saved Search.

First, select the employee type under **Hiring Proposals**:

Hiring Proposals ▾
Temporary Staff (SHRA)
Temporary Staff (EHRA NF)
Visiting / Part-time Faculty
Permanent Staff (EHRA NF)
Permanent Faculty
Permanent Staff (SHRA)
Postdoctoral Scholar

Then select **More Search Options**:

Saved Searches ⌄ | | Search | Q More Search Options ⌄

Then additional selections are available depending on employee type :

Saved Searches ⌄ | | Search | Q Hide Search Options ⌄
Add Column: Add Column
Workflow State: Workflow State
Department: Department

- **Add Column** and **Workflow State** filters will work the same as described under the Postings section.
- **Department** filters the results to only show the requested data for that department.
- For refining the view and once you have added columns, you can change the order, delete, and select the column to sort by using the functionality described under the Postings section.
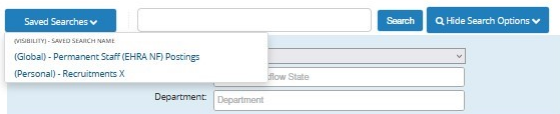
After saving, you can select the Personal Search by the name you entered using the dropdown under Saved Searches.

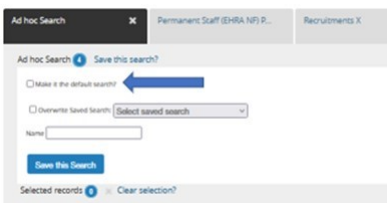## To Change your Default Search

First, select the search from the Saved Searches drop-down list you would like to update to make your default view.

In this example, select Permanent Staff (EHRA NF) under **Postings** and the Personal saved search *Recruitments X:*

Then, once viewing the information, we need to make a small change for example, adding a column, which we can then remove again by selecting **X** at the top of the column. This is enough of a change to enable us to Save the Search.

Set to personal default by selecting **Make it the default search**. Also, check the **Overwrite Saved Search** and select the name of the search from the drop down, which will pre-populate the Name field since you selected an existing search and are updating it to be the default. Then select **Save this Search**.

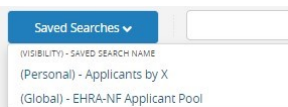After saving, this will be your default view when viewing Postings for this employee type.

To Delete your Personal Search

First, select the employee type under Postings. In this example, an applicants saved search for *Permanent Staff (EHRA NF)* was used.

Then select **More Search Options:**

Then select the Personal search to delete. In this example, *(Personal) - Applicants by X*:

Once on the results page after selecting Applicants by X, select **Delete this Search?**:

Then select **OK** to confirm.

Your Personal search *Applicants by X* will no longer be visible in the dropdown Saved Searches list.