


## Using Search to find a person record

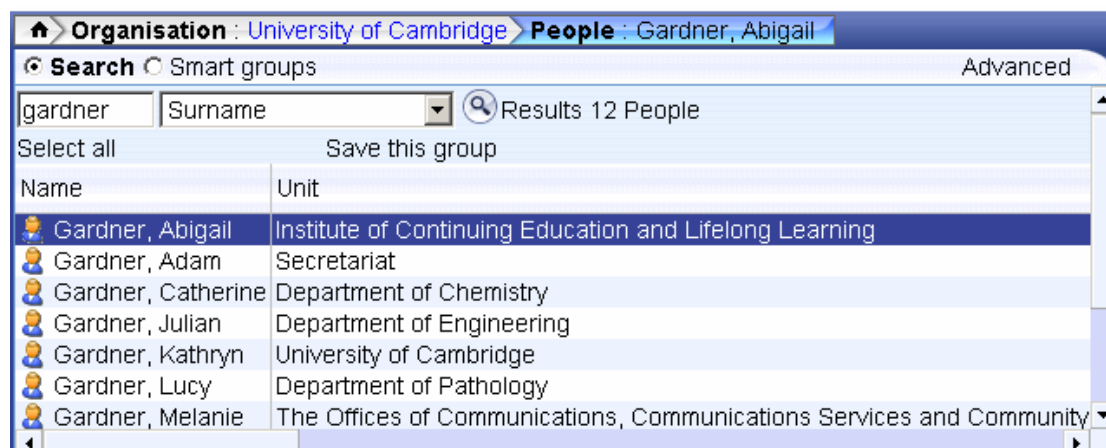
It is essential to establish that there is no existing record for a person before creating a new person record. Only one person record for each individual must exist.

There are two types of search that can be performed in the CHRIS system: simple search and advanced search








### Simple Search

#### Navigate: Organisation > People

1. Select the University of Cambridge organisation
2. Select the People menu item from the Action Pane
3. Key in the surname of the person and press Enter or click on 



The screenshot shows the CHRIS system interface. The breadcrumb navigation is 'Organisation : University of Cambridge > People : Gardner, Abigail'. The search mode is set to 'Search' (with 'Smart groups' as an alternative). The search criteria is 'gardner' in the 'Surname' field, resulting in 'Results 12 People'. Below the search bar, there are links for 'Select all' and 'Save this group'. A table displays the search results:

Name	Unit
 Gardner, Abigail	Institute of Continuing Education and Lifelong Learning
 Gardner, Adam	Secretariat
 Gardner, Catherine	Department of Chemistry
 Gardner, Julian	Department of Engineering
 Gardner, Kathryn	University of Cambridge
 Gardner, Lucy	Department of Pathology
 Gardner, Melanie	The Offices of Communications, Communications Services and Community

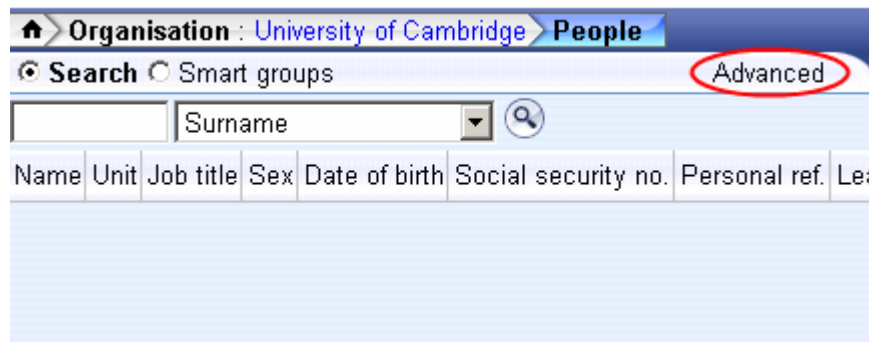
#### Note:

When using this method of searching, only current employees within the University or those who have not yet started their employment will be displayed.

Using the Advanced search is the only accurate way of establishing whether a person record exists for a person who has completed a period of employment and been made a leaver.

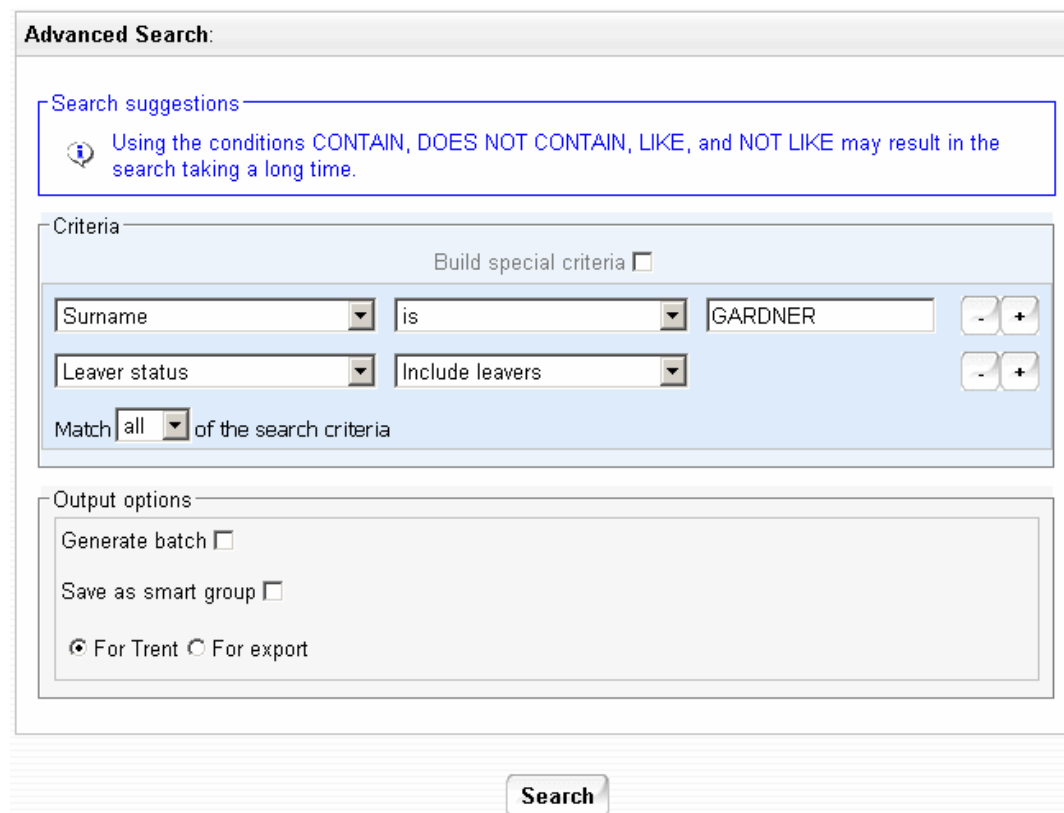
## Advanced Search

1. Select the University of Cambridge Organisation
2. Select the People menu from the Action Pane
3. Click on the Advanced button



The screenshot shows the top navigation bar with 'Organisation : University of Cambridge' and 'People' selected. Below this, there are radio buttons for 'Search' (selected) and 'Smart groups'. The 'Advanced' button is circled in red. A search input field contains 'Surname' and a search icon. Below the input field is a table header with columns: Name, Unit, Job title, Sex, Date of birth, Social security no., Personal ref., and Lex.

The display pane will then show the Advanced search display where you can enter more detailed conditions for your search.



The 'Advanced Search' dialog box contains the following elements:

- Search suggestions:** A blue box with a warning icon and text: "Using the conditions CONTAIN, DOES NOT CONTAIN, LIKE, and NOT LIKE may result in the search taking a long time."
- Criteria:** A section with a 'Build special criteria' checkbox. It contains two criteria rows:
  - Row 1: Surname dropdown, is dropdown, GARDNER text input, and minus/plus buttons.
  - Row 2: Leaver status dropdown, Include leavers dropdown, and minus/plus buttons.Below the criteria is a 'Match' dropdown set to 'all' and the text 'of the search criteria'.
- Output options:** A section with three checkboxes:
  - Generate batch
  - Save as smart group
  - For Trent  For export

A 'Search' button is located at the bottom center of the dialog box.

To search for people who have completed a period of employment and left the University you need to select Leaver status from the first drop down box

The screenshot shows a search form with the following fields:

- Surname: [dropdown] is [dropdown] GARDNER
- [dropdown] [dropdown] [dropdown]
- Starting date
- Leaving date
- Personal reference
- Contract start
- Contract end
- Contract position start
- Contract position end
- Position reference number
- Position occupancy reference
- Leaver status** (highlighted)
- Payroll

And then include leavers

The screenshot shows the search form with the following fields:

- Surname: [dropdown] is [dropdown] GARDNER
- Leaver status: [dropdown]
- Exclude leavers: [dropdown]
- Match: [all] of the search criteria
- include leavers (highlighted)
- Leavers only

This search returns an additional record than the simple search.

The screenshot shows the search results page with the following information:

- Organisation: University of Cambridge
- People: Gardner, Abigail
- Search Smart groups Advanced
- Surname [dropdown] Results 13 People
- Select all Edit this group

Name	Unit
Gardner, Abigail	Institute of Continuing Education and Lifelong Learning
Gardner, Adam	Secretariat
Gardner, Catherine	Department of Chemistry
Gardner, Julian	Department of Engineering
Gardner, Kathryn	University of Cambridge
Gardner, Lucy	Department of Pathology
Gardner, Melanie	The Offices of Communications, Communications & Public Relations

This is because there is a person with the surname specified who has left University employment.

Security no.	Personal ref.	Leaver ▲	Position
10099931		Yes	
10102558		No	434541
10103625		No	91957
10102862		No	94359

An additional advanced search using other criteria may also be performed. Surname, is not necessarily the best criteria to use, there are many examples of people with the same surname and of course a person's surname might have changed, for example where someone has subsequently got married.

National Insurance number is ideal criteria to use as this is a unique number to an individual.

**Advanced Search:**

Search suggestions

Using the conditions CONTAIN, DOES NOT CONTAIN, LIKE, and NOT LIKE may result in the search taking a long time.

Criteria Build special criteria

Social security number  WA150614D

Leaver status

Match  of the search criteria

Output options

Generate batch

Save as smart group

For Trent  For export

## Using Search

Using NI number (select social security number) together with Leaver Status of include leavers will check records for both existing and previous employees.

Search  Smart groups Advanced

Results 1 Person

[Edit this group](#)

Job title	Sex	Date of birth	Social security no.	Personal ref.	Leaver	F
	Female	09/03/1955	WA150614D	10099931	Yes	

Only when you have confirmed that the person does not already exist on the system should you continue with the new starter process.