There are two types of search methods in UCPath: **Basic Search** and **Advanced Search**.

When you select most pages or components in UCPath, the system displays a **Find an Existing Value** section where you can search for the records you want to display. In this section, you can toggle between the basic search and advanced search functionality.

The **Basic Search** method enables you to search by only one field at a time, and then only using the **begins with** operator. To designate the search field, if more than one is available, select the desired field from the **Search by** list of values, enter your search criteria, and then click the **Search** button to display the results.

On the **Advanced Search** section, you can search using multiple fields and using a variety of search operators.

Some search criteria fields also provide a list of valid values for a field. You can use the **Lookup** button to search for specific search criteria.

UCPath also supports three wildcard features when searching for data in character fields.

This topic describes how to effectively use search methods.

Step	Action
1.	The <b>Personal Information</b> search page provides basic and advanced search options.
	Navigator > Workforce Administration > Personal Information > Modify a Person > Personal Information OR
	Global Search > Personal Information
	OR Benefits Administration Homepage > Employee/Dependent Info Tile > Employee
	Information Folder > Modify a Person > <b>Personal Information</b>



Step	Action
2.	Employee ID ( <b>Empl ID</b> ) provides the most accurate search results and should be used whenever possible.
	When <b>Empl ID</b> is not available, a name field can help find an employee. There are two name fields in UCPath: <b>Legal Name</b> and <b>Name</b> .
	Legal Name The Legal Name field is the name that identifies a person for legal or certain official purposes.
	In UCPath, Legal Name is always labeled as "Legal Name".
	Its presentation and use are restricted to protect confidentiality.
	<u>Name</u> The <b>Name</b> field is a self-chosen or personal and/or preferred professional name used instead of a <b>Legal Name</b> and can be one's first name, middle name and/or last name or surname.
	If no <b>Name</b> is specified by the employee, it is populated from the <b>Legal Name</b> . This name is used for university business and education whenever possible.
	It is the typical UCPath name field used and presented on pages and reports throughout the system.
3.	When you select a page or component, the system usually defaults to the Advanced Search method in the <b>Find an Existing Value</b> section.
	You know this is the Advanced Search method because the Basic Search link, <b>Show fewer options,</b> appears at the bottom of the section so that you can switch to that search method. Also, the appearance of multiple search fields indicates this is the Advanced Search method.
	You also can click the <b>Add a New Value</b> button to add a new record instead of searching.
	Let's first look at Basic Search.



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Step	Action
4.	Click the <b>Show fewer options</b> link.
	Show fewer options
5.	You can only use one search criteria field for a basic search.
	<b>Empl ID</b> is the default field for the <b>Personal Information</b> component, but additional fields are available in the list of values.
	Click the button to the right of the Search by field.
	Empl ID 🗸

Personal Information	New Window   Help
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Enter any information you have and click Search. Leave fields blank for a list of all values.	
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Step	Action
6.	In general, a <b>Basic Search</b> section offers most of the fields shown on the <b>Advanced Search</b> section.
	The <b>Search by</b> list enables you to select different search keys to search against the database. You also can enter full or partial values for the key field.
	For this example, you need to locate an employee whose last name is Tsilimparis. You may not know the proper spelling of Tsilimparis, but you know it begins with "tsi".

Personal Information	New Window   Help
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Step	Action							
7.	Click the Last Name list item.							
	Last Name							
8.	Enter the desired information into the <b>begins with</b> field.							
	For this example, enter tsi.							
9.	Click the <b>Search</b> button.							
	Search							

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Step	Action
10.	The Search Results show all rows matching your search criteria.
	In this case, these are all the employees whose last name begins with "tsi".
	You are looking for Anahid Tsiknia.
11.	You can sort by First Name to quickly find Anahid.
	Click the <b>First Name</b> column header. First Name
12.	Click the link to display the details for any person on the list.
	>
13.	Click the <b>Return to Search</b> button.
	Return to Search



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Step	Action
14.	The system returns you to the <b>Advanced Search</b> section with the criteria from the previous search displayed.
	To search again with new criteria, use the <b>Clear</b> button to refresh the page.
	Click the <b>Clear</b> button.
	Clear
15.	The Advanced Search section contains several fields to search for your data.
	The options enable you to narrow your search by entering values in more than one field.
16.	Click the <b>Search</b> button.
	Search
17.	UCPath prompts you to enter at least one search criterion.
	Click the <b>OK</b> button.
	ОК
18.	Click the button to the right of the <b>Empl ID</b> search operators field.
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Step	Action
19.	You can use the search operators to specify search criteria.
	The default operator searches for records that begin with your search criteria, but you may want to use other operators to find the desired records.
20.	Click in the <b>Empl ID</b> field.
21.	In this example you will enter part of an employee ID number.
	Enter the desired information into the <b>Empl ID</b> field.
	For this example, enter 10000.
22.	Click the <b>Search</b> button.
	Search



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Step	Action
23.	The search function retrieves up to 300 entries from the database displaying the results in groups of 100 in the <b>Search Results</b> grid.
24.	You can sort the results using any heading in the <b>Search Results</b> grid. To sort ascending by <b>Last Name</b> , click the <b>Last Name</b> column header. Last Name
25.	To sort descending, click the Last Name column header again.
26.	You can use the scroll bar to scroll through the currently displayed list of search results. Click the scroll bar.



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Step	Action
27.	Click the <b>Show next rows</b> button to display the next 100 results.
28.	You also can use the <b>First</b> and <b>Last</b> links to move from the first entries to the last entries in the <b>Search Results</b> grid.
	To return to the first 100 entries, click the <b>Show previous rows</b> button.

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10000073	Jaqueline Acharva	Jaqueline	Acharva	A	(blank)	A	>		



Step	Action
29.	To search using new criteria, click the <b>Clear</b> button.
	Clear
30.	Click in the Last Name field.

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Personal Information	
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Nothing yet Your search results will appear here	
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Step	Action
31.	Enter the desired information into the Last Name field.
	For this example, enter Williams.
32.	Click the <b>Search</b> button.
33.	If the search criteria you selected is something you think you may use frequently, you can save the specifics of the search. Click the <b>Save Search</b> link.



			New Window   He
ave Search			
	Name		
	Last Name WILLIAMS		
Cancel		Save	

Step	Action
34.	Click in the Name field.
35.	Enter the desired information into the <b>Name of Search</b> field. For this example, enter <b>Williams</b> .
36.	Click the Save button.
37.	Click the <b>OK</b> button.

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Step	Action
38.	Click the <b>Clear</b> button.
	Clear

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Step	Action
39.	Click the button to the right of the Saved Searches field.
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Enter any information you have and click Search. Leave fields blank for a list of all values.	
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Last Name begins with V	
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Step	Action							
40.	Click the <b>Williams</b> list item.							
	Williams Last Name:WILLIAMS							
41.	Click the <b>Search</b> button.							
	Search							

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Empl ID	Name	First Name	Last Name	Second Last Name	Character Name	Middle Name				

Step	Action
42.	The Search Results grid contains only employees with the last name Williams.
	When you no longer need a saved search, click the <b>Edit Saved Searches</b> link.



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Step	Action
43.	Select the saved search criteria.
	In this example, only your Williams criteria exists.
	Click the <b>Delete</b> button.
	×
44.	Click the Save button.
45.	Click the <b>Clear</b> button to erase the previous search criteria.
46.	It is better to narrow your search if the results display too many rows to effectively review. In this example, enter a partial employee ID. Click in the <b>Empl ID</b> field.
47.	Enter the desired information into the <b>Empl ID</b> field. For this example, enter <b>1000</b> .
48.	Click the Search button.



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Step	Action
49.	The Search Results grid contains 300 entries.
	You are looking for Christine Johnson. To narrow your search enter part of her last name.
	Click the Last Name column header.
50.	Enter the desired information into the Last Name field.
	For this example, enter John.
51.	Click the <b>Search</b> button.

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Step	Action
52.	The results decrease to 26 entries - much easier to find the employee.
	Click the Melissa Johnson link.
	>
53.	Click the <b>Return to Search</b> button.
	Return to Search
54.	Click the <b>Clear</b> button.
	Clear
55.	If you know the full value, enter it in the Search Criteria.
	In this example you have the exact ID for Payton Bahrami.
	Click in the <b>Empl ID</b> field.
56.	Enter the desired information into the <b>Empl ID</b> field.
	For this example, enter 10000693.
57.	Click the <b>Search</b> button.
	Search
58.	The search results table will always display, even if only one row is returned.
	Click the <b>Payton Bahrami</b> link.
	>
59.	Some fields provide a <b>Lookup</b> button to help you select criteria.
	Go to the <b>Regional</b> page to learn how to use this feature.
	Click the <b>Regional</b> tab.
	Regional



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Step	Action
60.	The <b>Ethnic Group</b> field uses a <b>Lookup</b> (magnifying glass) button to provide a list of valid values for the field and also restrict the values entered into the field.
	Click the Look up Ethnic Group button.
	Q

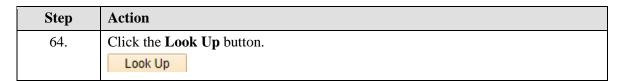
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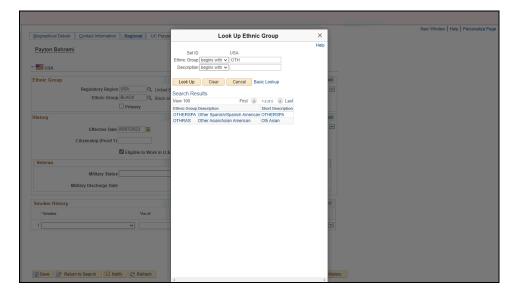
Step	Action
61.	On the <b>Look Up Ethnic Group</b> page you can search for a value by using the <b>Search Operators</b> and entering all or part of a value in a search field.
62.	Click in the <b>Ethnic Group</b> field.



Step	Action
63.	Enter the desired information into the <b>Ethnic Group</b> field.
	For this example, enter <b>oth</b> .

		UC Person		Look Up Ethnic Group	×		
					Help		
Payton Bahrami			Set II	) USA	Those		
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Ethnic Group			Look Up	Clear Cancel Basic Lookup		ast	
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	Primary		Ethnic		Short		
			Group	Description	Description		
History			AMIND	American Indian or Alaska Native	Am Ind/Ala	ast	
Citrative Dat	e 05/07/2023	100	BLACK	Black or African American	Blk/AfAmer		
Effective Dat	e 05/07/2025	<u>_</u>	CHINESE	Chinese/Chinese American	Chinese		
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			EUROPEAN		European		
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Veteran				Japanese/Japanese American	Japanese		
veteran			KOREAN	Korean/Korean American	Korean		
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				Mexican/Mexican American	MexAmer		
Military Discharge Dat	te			Middle Eastern	MidEastern		
				North African	NAfrican		
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Smoker History			OTHERSPA	Other Spanish/Spanish American Other Asian/Asian American	Oth Asian	st	
*Smoker	*6	s of	PACIF	Native Hawaiian or Other Pacific Islander	Pacif		
			PAKIND	Pakistani/Pakistani Americn/Indian/Indian Americn	Paki/EaInd		
1	~		PHILIPI	Filipino/Filipino Americn/Pilipino/Pilipino Amercn	Philippine		
				Unknown Ethnic Group [Conversion Use Only]	UNK		
				Vietnamese/Vietnamese American	Vietnam		
			WHITE	White (Not Specified)	White		







Step	Action
65.	Select the correct value from the Search Results grid.
	Click the <b>OTHERSPA</b> list item.
66.	Click the <b>Return to Search</b> button.
	Return to Search

		New Window   Help   Person
Biographical Details Contact Information	Regional UC Personal Data	
Payton Bahrami	Person ID 10000893	
USA		
Ethnic Group	Find   View All First 🛞 1 of 1 🛞 Last	
Regulatory Region US	SA Q. United States	
	THERSPA Q Other Spanish/Spanish American	
	Primary	
History	Find   View All First 🚯 1 of 1 🚯 Last	
Effective Date 05/		
Effective Date 050 Citizenship (Proof 1)	Do you want to save your changes? Click Yes to go back and save, or No to discard your changes.	
Citizenship (Proof 1)		
Citizenship (Proof 1)	Do you want to save your changes? Click Yes to go back and save, or No to discard your changes.	
Citizenship (Proof 1)	Do you want to save your changes? Click Yes to go back and save, or No to discard your changes.           Yes         No           Edit Discharge Date	
Citizenship (Proof 1)	Do you want to save your changes? Click Yes to go back and save, or No to discard your changes.           Yes         No           Edit Discharge Date	

Step	Action
67.	You do not want to save your change.
	Click the No button.



	nformation										
									Add a New Value		
	Existing Valu	e									
	n Criteria										
Enter any	y information you	have and click Sear	h. Leave field	s blank for a l	st of all values						
10 R	Recent Searches	Choose from rece	nt searches		~ /	Saved Sea	ches Ch	cose from saved searches	~	T	
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Step	Action			
68.	Click the <b>Clear</b> button.			
	Clear			

Wildcard	Definition	
Wildcard % (percent sign)	Definition Match one or more characters	
% (percent sign)	Match one or more characters	
% (percent sign) _ (underscore)	Match one or more characters Match any single character Escape character—don't treat the next	
% (percent sign) _ (underscore)	Match one or more characters Match any single character Escape character—don't treat the next	
% (percent sign) _ (underscore)	Match one or more characters Match any single character Escape character—don't treat the next	
% (percent sign) _ (underscore)	Match one or more characters Match any single character Escape character—don't treat the next	

Step	Action
69.	UCPath applications support three wildcard features when searching for data in character fields. These wildcards can be helpful in finding the exact information you want to process. The table below displays the supported standard wildcard features: the percent sign to match one or more characters, the underscore to match any single character, and the backslash as an escape character (meaning it doesn't treat the next character as a wildcard).



Step	Action
70.	For example, suppose you are looking for a specific employee but can't remember their ID.
	You know that the ID begins with "1" and contains the numbers "149".
	You can use the % wildcard to locate the employee.
	Click in the <b>Empl ID</b> field.

				Add a New Value	
nd an Existing Valu	•			O Add a New Value	
Search Criteria					
inter any information you	ave and click Search. Leave fields blank for a list	of all values.			
Recent Searches	Choose from recent searches	V / 🛛 Saved Sea	arches Choose from saved searches	· · ·	
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	Name begins with V				
	Last Name begins with 🗸				
	nd Last Name begins with V				
Alternate C	Middle Name begins with v				
	A Show fewer options				
		Correct History			
		Conect History			
	Search Clear				

Step	Action
71.	Enter the desired information into the <b>Empl ID</b> field.
	For this example, enter 1%149.
72.	Click the <b>Search</b> button.
	Search



	on						
ind an Existin	u Value					Add a New Value	
Search Criteria	-						
Enter any informa	ion you have and click S	earch. Leave fields b	lank for a list of all values.				
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	ults Empl ID "1%149	1"					
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			View 100 (2) Fin Second Last Name Atternate Name	it (1.10 of 23 )) Middle Name	Last		

Step	Action
73.	There are 23 employees who match this criterion.
74.	Click the <b>Clear</b> button.
75.	You have successfully searched for data using both <b>Basic Search</b> and <b>Advanced</b> <b>Search</b> methods, the <b>Lookup</b> button and wildcards. <b>End of Procedure.</b>