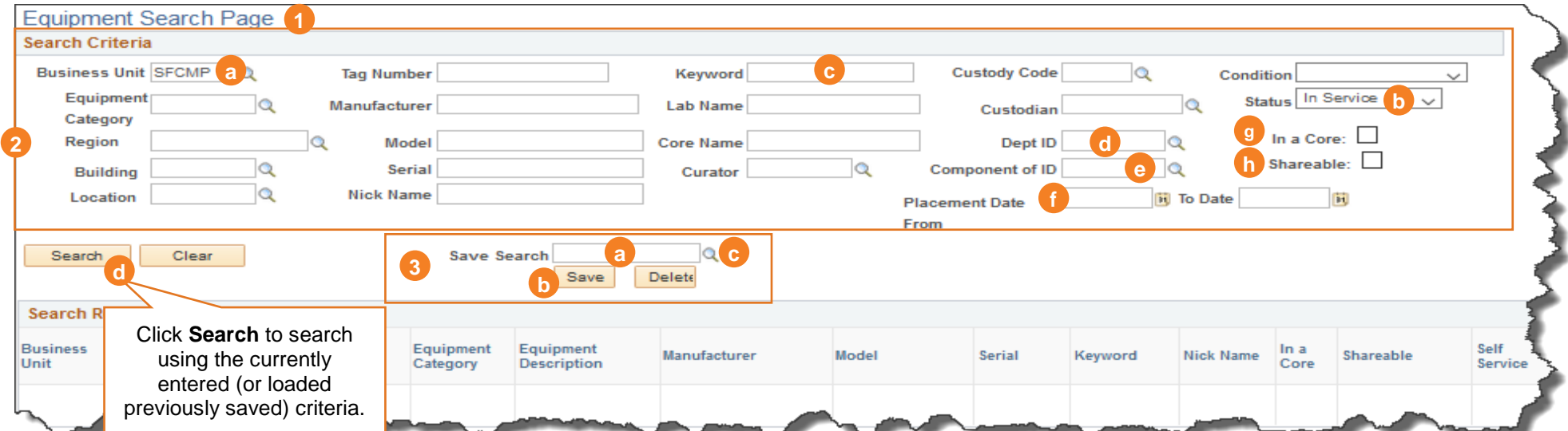# Capital Equipment Internal Search

UCSF

The **Capital Equipment Internal Search** page is a custom search page within PeopleSoft available to users with a role assignment in the Asset Management module (e.g., Custodian, Custodial Delegate, Curator, Maintenance or RRP Admin). The page enables users to add specific search criteria in order to narrow the search results returned. Clicking a hyperlinked equipment record in the search results will open the equipment Asset Information page for review or editing. Search Criteria may be saved to rerun at a later date as needed.

Click **Search** to search using the currently entered (or loaded previously saved) criteria.

1 (Not shown) A link to the Capital Equipment Internal Search page is located within the WorkCenter under the **Links** section. Click the Capital Equipment Internal Search link under Manage Assets to open the Equipment Search Page.

2 The search page contains numerous criteria to help narrow search results.

Default search parameters limit results to the Campus Business Unit **SFCMP**(**a**) and the equipment Status of **In Service** (**b**).

c **Keyword**: Enter one of more keywords separated by a comma (e.g., "Infrared, Fluorescence").

d **Dept ID:** Click the magnifying glass to search for or enter the purchasing Department's Dept ID to return all equipment for the department.

e **Component of ID**: Click the magnifying glass to search by Tag# or Asset ID to view all equipment records that have been linked together as a system.

f **Placement Date**: This is a customized field added to the Asset Information page. Custodians can update this field to indicate the actual date that equipment is received.

g **In a Core**: Check to *include* or uncheck to *not exclude* equipment records in your search results that are flagged as part of a Core.

h **Shareable**: Check to return equipment records that have been flagged as shareable with accompanied contact information.

3 After entering your criteria, **Save** your search to avoid re-entry each time:

a Enter a name for your search in the **Save Search** field. If you receive the message, "No matching values were found." ignore and continue naming your saved search.

b Click **Save**.

The next time you return to the search page, load saved search criteria by:

c Clicking the magnifying glass and selecting your saved search name from the list.

d Click **Search** to run the search query based on your saved criteria.

# Capital Equipment Internal Search

Search Results

Search results are returned as series of equipment rows and columns similar to an Excel spreadsheet. Use the scroll bars at the bottom and right of the page to view all details of the information returned.

6   Click on active hyperlinks (e.g., **Asset ID**) for an equipment record to access additional information:

   a   **Asset ID**: Opens the Asset Information page for the equipment record for review or edits.

   b   **Keywords**: (not shown) Opens to the Keyword tab of the equipment record.

   c   **Photo**: (not shown) Opens to the Photo tab of the equipment record.

Export Results to Excel

7   Scroll to the far right of the search results window and click the **Download Search Results** icon.

8   (Not shown) Either download or open the file in Microsoft Excel.

9   If you receive a file format and extension message click **Yes** to trust the source and continue opening the file in Excel.
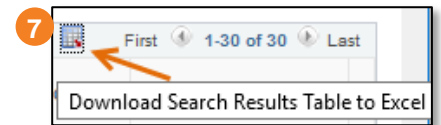
Column Sorting and Reorder

Data in the search results can be sorted by ascending or descending order based on the column header selected to sort by.

10   Click on a column heading. A black arrow will indicate if the column data is sorted in ascending or descending order. Click the heading again to change the order.
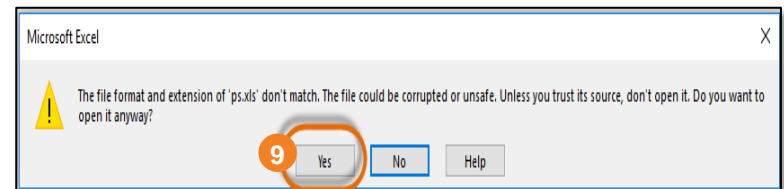
Column Drag and Drop:

11   The display order of columns in the returned data can be changed by dragging columns from one position to another.

   a   Click on a **column name** (e.g., **Tag Number**) and hold the mouse button down.

   b   Drag the column to a new position in the displayed results and release the mouse button. In this example, **Tag Number** was moved before **Asset ID**.

Capital Equipment Internal Search

Personalize Column and Sort Order:

1 Column and Sort order can be set as a default. Scroll to the far right of the search results window and click the **Personalize** link.

1 Personalize Find | View All | 🗗 | 📊

2 The column headings are displayed in the Column Order section by order displayed in the search results from left to right.

Highlight a column name by clicking on it and then:

a **Click** the Add to Sort Button to add columns to the Sort Order section.

b **Click the** Move Up and Move Down buttons for either section to change the column or sorting order.

c To limit the number of columns returned in your results, select a column and check **Hidden**. "(hidden)" will display next to the column name. In your next search, only visible columns will be displayed.

d Use the frozen checkbox to lock columns so that they cannot be moved by the drag and drop feature. When highlighting a row to select this option all preceding columns will also be frozen and "(frozen)" will display next to the column name.

Personalize Column and Sort Order

To order columns or add fields to sort order, highlight column name, then press the appropriate button. Frozen columns display in order every tab.

Column Order
- Business Unit
- Asset ID
- Status
- Tag Number
- Equipment Category
- Equipment Description
- Manufacturer
- Model
- Serial
- Keyword
- Nick Name

☐ Hidden
☐ Frozen

Sort Order
- Equipment Description

☐ Descending

3 To edit items moved to the **Sort Order** section, select a column name by clicking on it and then:

a Check the **Descending** checkbox to sort the selected column in descending order.

b Click the Remove from Sort button to remove a column from the sort.
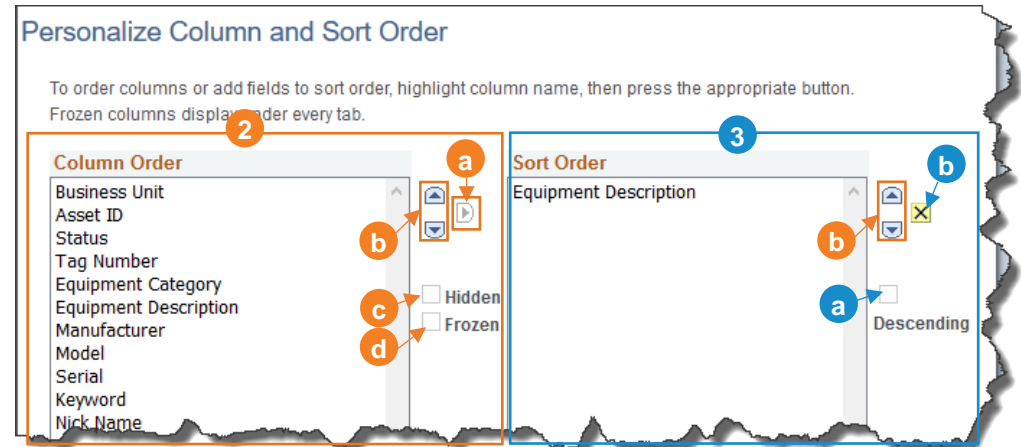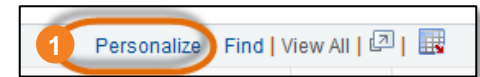
You can preview changes made prior to exiting the page to confirm the options selected.

4 Click the **Preview** button located at the bottom of the page. A preview window will display below your personalized selections for review.

5 Click **OK** to confirm your selection or continue to make changes and preview.

Useful Life (hidden)
Cost (hidden)
Photo (hidden)

5 OK   Cancel   **4** Preview   Copy Settings Share Settings Delete

Search Results

Asset ID	Tag Number
999182001206	998877008