

About search

Quick-search

Path to function: *Toolbar > Accounts search...*

The quick-search function allows you to quickly find accounts directly under you by searching across key fields for words that start with the search term (e.g. 'bob' would find 'Bobby' but not 'Spongebob').

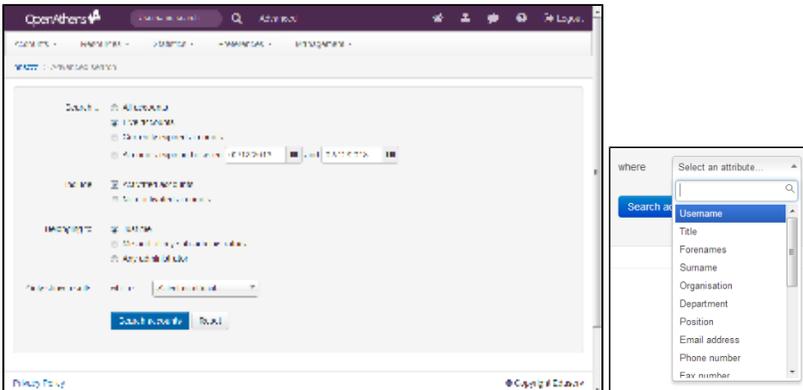
Because information about OpenAthens accounts and Local accounts is stored differently there are some differences in how quick-search handles them. For OpenAthens accounts, only the key fields of username, first name, last name and email address are queried by quick-search. For local accounts - all cached fields are searched as there is no common set.

Advanced search

Path to function: *Toolbar > Advanced*

Unlike quicksearch the advanced search allows you to find individual OpenAthens accounts or subsets of them based on any attribute or combination of attributes. Both will allow you to perform [actions](#) upon results such as delete, activate, download, and the assignment of permission sets or groups. Advanced search only supports OpenAthens accounts.

Start on the search page with some basic decisions about the accounts' status, expiry date and [location](#), and then choose any combination of other attributes to perform the search including email, date, and name fields; there are many attributes to choose from and you can see all the ones that are available when you click on the field list. If you know the field name, you can start typing it and the list will shorten. All fields from your schema are included.



If you find that the default search criteria don't suit your usual searches, you can save your preferred settings using the 'Search settings' link on the right. This is saved on your device rather than your administrator account, which means that if you use different computers to administer OpenAthens you may have to save this default on each. This function may not be available on some older browsers.

As with statistics and auditing, any date ranges are inclusive. You will not see groups as a searchable field but there are options on the [results page](#) for filtering by group.

Advanced search is designed to be more focussed than quick-search so does not automatically run a prefix query and instead looks for matching whole words. You can add an asterisk to the end of a partial word to run a prefix query if you need to though - e.g.

Search	Returns	Does not return
First name for Jo	Jo Mary Jo	Joanne John
First name for Jo*	Jo Joanne John Mary Jo	

First name for <i>MaryJo*</i>	Mary Jo	Jo
	Joanne Mary	Joanne
		Mary

In fields that contain punctuation, most are treated as word separators but dots, single quotes / apostrophes and underscores (. ' _) are not. This usually only affects fields such as Email addresses e.g:

Search	Returns	Does not return
Email for <i>smith</i>	smith@domain.com john-smith@domain.com john\$smith@domain.com john^smith@domain.com	john.smith@domain.com john_smith@domain.com
Email for <i>john-smith</i>	john-smith@domain.com john\$smith@domain.com john^smith@domain.com	john.smith@domain.com john_smith@domain.com
Email for <i>john.smith</i>	john.smith@domain.com	john_smith@domain.com john-smith@domain.com john\$smith@domain.com john^smith@domain.com
Email for <i>webmail</i>		bob@webmail.com
Email for <i>webmail.com</i>	bob@webmail.com	
Email for <i>webmail.*</i>	bob@webmail.com sally@webmail.co.uk webmail.dave@gmail.com	

There are other operators you can use beside the wildcard:

Operator	Description	Effect	Example (using first names)	Example result
+	plus	AND	<i>Ann + Marie</i>	Ann Marie, Marie Ann
	pipe / vertical line	OR	<i>Ann Marie</i>	Ann, Ann Marie, Ann Margaret, Marie, Marie Ann, Marie Claire
-	minus	NOT	<i>Ann -Marie</i>	Ann, Ann Margaret
"	quote	Defines a phrase	<i>"Ann Marie"</i>	Ann Marie
*	asterisk	Prefix query	<i>Ann*</i>	Ann, Anna, Annabelle, Ann Marie, Marie Ann
()	brackets	Precedence	<i>(Ann Marie) + Marg*</i>	Ann Margaret, Margetta Ann, Marie Margaret

You can string many operators together if you need to - e.g. if you wanted to exclude certain email domains from your results, you might add something like this to the email field:

`-gmail.* + -yahoo.* + -hotmail.* + -me.com + -outlook.com`

You can also spread the terms over multiple lines - for example if you add the email field from the selector twice, it will be treated as an AND

Viewing results

Username	Forenames	A. Surname	Email address	Status	Owner
athpylybaesh0001	Petyr	Baelish	athens.workshops@go...	active	athensdemo
athnbaratheon0001	Joffrey	Baratheon	athens.workshops@go...	not activated	athensdemo
athnbaratheon0001	Robert	Baratheon	athens.workshops@go...	active	athensdemo
athnbaratheon0001	Stannis	Baratheon	athens.workshops@go...	not activated	athensdemo
athsandorlegane0001	Sandor	Clegane	athens.workshops@go...	expired	athensdemo
athjaynecobb0001	Jayne	Cobb	athens.workshops@go...	active	athensdemo
athnandrogo0001	Khal	Drogo	athens.workshops@go...	active	athensdemo
athnongreyjoy0001	Theon	Greyjoy	athens.workshops@go...	active	athensdemo
athnmarjade0001	Mara	Jade	athens.workshops@go...	active	athensdemo
athobwankeob0001	Obi-Wan	Kenobi	athens.workshops@go...	active	athensdemo
athclannister0001	Cersei	Lannister	athens.workshops@go...	not activated	athensdemo

Results are split by account type (including deleted) and each tab will have a number indicating how many accounts of that type have been found.

If there are a large number of accounts returned, they may be spread over several pages. You can switch between pages or change the number of displayed results with the selectors at the top right of the results.

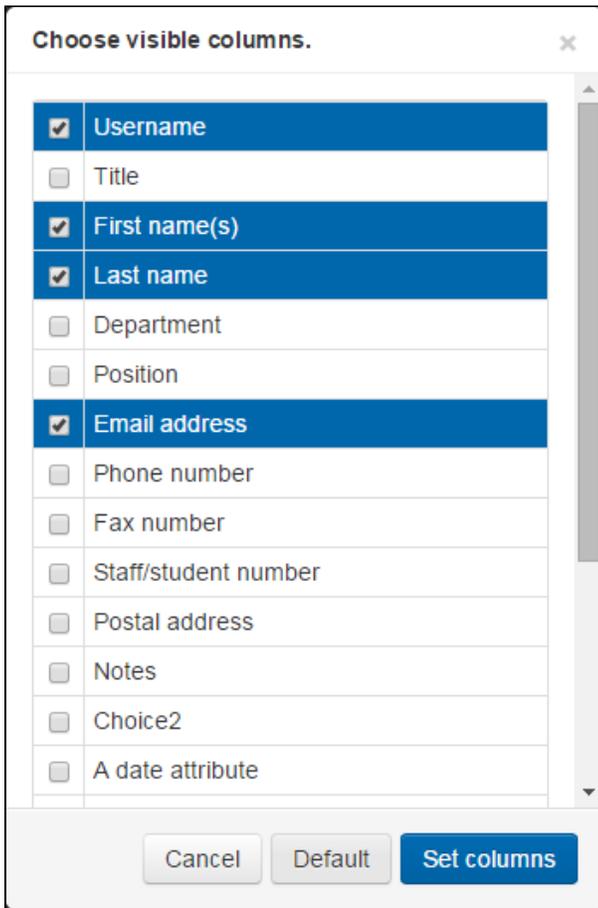
If the results are not quite what you need you can use the 'refine search' button to step back and modify your criteria.

Groups

If you limited your search to your own accounts (rather than including those of sub-organisations) there will be a groups button available which you can use to results to a single group. Group filters only apply to the account type you are viewing; they can be renamed or removed on the [groups](#) page.

Username	Forenames	A. Surname	Email address	Display name	Status
athpylybaesh0001	Petyr	Baelish	athens.workshops@go...	active	active
athnbaratheon0001	Joffrey	Baratheon	athens.workshops@go...	not activated	not active
athnbaratheon0001	Robert	Baratheon	athens.workshops@go...	active	active
athnbaratheon0001	Stannis	Baratheon	athens.workshops@go...	not activated	not active
athsandorlegane0001	Sandor	Clegane	athens.workshops@go...	expired	expired
athjaynecobb0001	Jayne	Cobb	athens.workshops@go...	active	active
athnandrogo0001	Khal	Drogo	athens.workshops@go...	active	active
athnongreyjoy0001	Theon	Greyjoy	athens.workshops@go...	active	active
athnmarjade0001	Mara	Jade	athens.workshops@go...	active	active
athobwankeob0001	Obi-Wan	Kenobi	athens.workshops@go...	active	active
athclannister0001	Cersei	Lannister	athens.workshops@go...	not activated	not active

Any attributes you selected from the list on the criteria page will automatically appear in your results. You can also add or remove columns to the display with the column chooser button (). All fields from your schema are available and the fields you select will appear in search and list pages for that account type until you return the selection to default via the button in the field chooser. This field memory is linked to the browser rather than the user and may not be available on some older browsers.



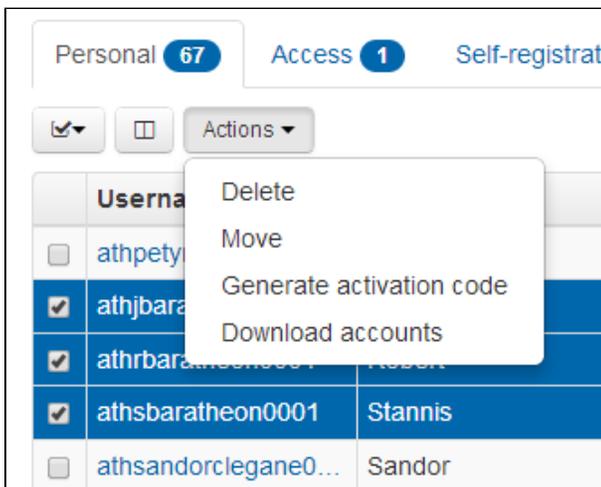
If you find that you need to display more columns on the screen than can fit on your monitor, then selecting all accounts and picking [data download](#) from the actions menu will let you view the data in your favourite spreadsheet package.

To save space on the results screen the attributes you added on the search screen are collapsed and can be viewed by clicking on *Show attribute(s)* in the blue box.

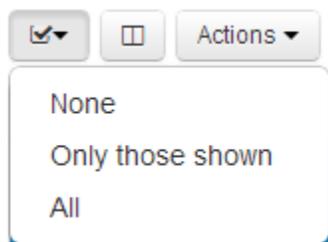
Actions on accounts

Clicking on an individual account name will take you to the details page for that account and from there you can [modify the account](#) in any way you need to.

For actions that you want to apply to several accounts, you can select them using the check-boxes on the left at which point you'll be able to use the [Actions button to perform operations on those accounts](#) such as deleting or moving.



The select all option and the actions button apply only to the tab of the currently displayed account type and can be applied to both the page of visible results or all results of that account type. Some actions are not always available - e.g. Administrator accounts cannot be deleted this way - and any search that includes accounts belonging to sub-administrators will not have the option to work with permission sets.



Locations

The search 'Any organisation' option, where visible, searches across all the organisations of your [domain](#). This allows a sub-administrator to search for accounts within the wider domain that they would otherwise not be able to find because they do not fall directly under their control.

There will not be as many details visible as for accounts under your control, but there will be sufficient to confirm you have the correct user, and there is a facility to contact the administrator who does control the account.

If you searched under 'Me and all my sub-organisations' more details and options are available in the results but they are limited to accounts under you and your own sub-organisations.