



Job Aid



ADVANCED SEARCH

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Purpose: To illustrate how to search for a subject using the Advanced Search feature.

ADVANCED SEARCH

How to Search Using the Advanced Search Feature

1. Select **Subject Management** from the Left Navigation Menu.
2. Select the **Advanced Search** hyperlink on the My Subject List page.

The screenshot shows the 'National Background Investigation Services' interface. On the left, the 'Subject Management' menu item is highlighted. The main content area is titled 'Subject Management' and contains a 'My Subject List' section. Below this, there is a search bar with the text 'Search on All Fields' and a checkbox for 'Include Subjects in My Hierarchy'. The 'Advanced Search' link is highlighted with a yellow box. Below the search bar, the total results are shown as 1,034. A table of subjects is displayed with columns: SSN, Last Name, First Name, Citizenship, Organization, Determination, and Determination Status. The table contains three rows of data.

SSN	Last Name	First Name	Citizenship	Organization	Determination	Determination Status
	Bella	Stella	United States	Defense Counterintelligence and Security Agency/1000C	Suitable/Fit	Active
	Olive	Sarah	United States	Defense Counterintelligence and Security Agency/1000C	---	---
	Cook	Tia	United States	Department of Security Managers 1/1005P	Secret	Active

3. On the Advanced Search page, check the **Include Subjects in My Hierarchy** box to include all subjects under the user's hierarchy.

The screenshot shows the 'Advanced Search' page. The 'Include Subjects in My Hierarchy' checkbox is checked and highlighted with a yellow box. Below the checkbox, there is a 'Search Field' dropdown menu with the text 'Select Field...'. At the bottom of the page, there are 'Cancel' and 'Submit' buttons.

4. Select an option from the Search Field drop-down menu.

The screenshot shows the 'National Background Investigation Services' interface. On the left is a dark sidebar with navigation links: Dashboard, Task Management, Visit Management, Subject Management (highlighted), Org Management, Order Form Library, System Settings, Reports, and Error Management. The main content area is titled 'Subject Management' and contains an 'Advanced Search' section. Below the title, there is a instruction: 'Select the search field and enter the corresponding search text in the fields below. Select Add Search Criteria to add an additional search criteria. Select Submit to display results.' A checkbox labeled 'Include Subjects in My Hierarchy' is checked. The 'Search Field *' drop-down menu is open, showing a list of options: Select Field..., Access Level, Last Investigation Close Date, Last Investigation Type, Last Name, Organization, Place of Birth, SSN, Ca Type, Access Status, Add Ons, Citizenship, and CV Enrollment. A 'Submit' button is located at the bottom right of the search area.

5. A new drop-down or text field will populate to the right of the Search Field dependent on the field selected.
6. Fill in the text field with data points to search for or select an option from the drop-down. The user can select more than one data point from the drop-down menu.

This screenshot shows the same 'National Background Investigation Services' interface. In the 'Advanced Search' section, the 'Search Field *' drop-down menu is now closed and displays 'Access Level'. To its right, a new 'Access Levels' drop-down menu has appeared and is open, showing a list of access levels. Below the search fields, there are links for '+ Add Search Criteria' and 'Clear All'. At the bottom left of the search area is a 'Cancel' button, and at the bottom right is a 'Submit' button.

7. Select **Add Search Criteria** to include an additional field in the search. Searching by multiple fields will return results that include all search criteria.

The screenshot shows the 'National Background Investigation Services' interface. The left sidebar contains navigation links: Dashboard, Task Management, Visit Management, Subject Management (highlighted), Org Management, Order Form Library, System Settings, Reports, and Error Management. The main content area is titled 'Subject Management' and contains an 'Advanced Search' section. Below the title, there is a checkbox for 'Include Subjects in My Hierarchy' which is checked. There are two 'Search Field' dropdown menus; the first is set to 'Access Level'. To the right of these is an 'Access Levels' dropdown menu. At the bottom of the search criteria section, the '+ Add Search Criteria' button is highlighted with a yellow box, and a 'Clear All' link is visible next to it. At the very bottom of the section are 'Cancel' and 'Submit' buttons.

8. Select **Clear All** to reset the search field selections.

This screenshot shows the same 'Advanced Search' interface as the previous one, but with different selections. The 'Include Subjects in My Hierarchy' checkbox is now unchecked. The first 'Search Field' dropdown is still 'Access Level', but the 'Access Levels' dropdown now shows 'Top Secret'. The second 'Search Field' dropdown is now set to 'Organization', and the 'Organizations' dropdown shows 'Defense Counterintellige...'. The '+ Add Search Criteria' button is no longer highlighted, but the 'Clear All' button next to it is highlighted with a yellow box. The 'Cancel' and 'Submit' buttons remain at the bottom.

9. Select **Submit** to apply the Advanced Search criteria and to view the My Subject List table results.

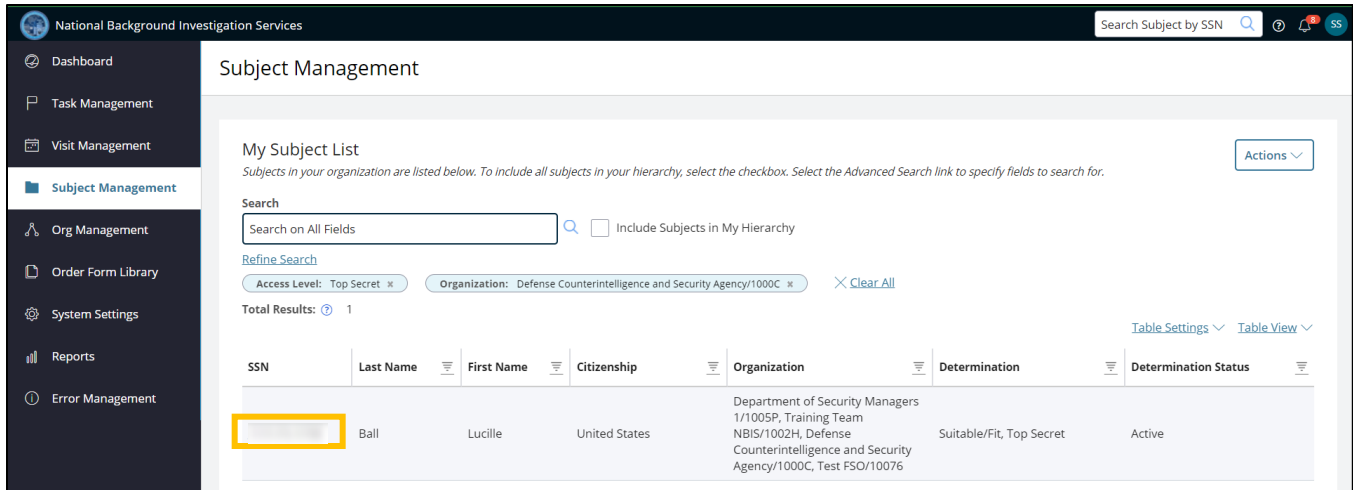
The screenshot shows the 'Subject Management' page with the 'Advanced Search' section. The left sidebar contains navigation links: Dashboard, Task Management, Visit Management, Subject Management (highlighted), Org Management, Order Form Library, System Settings, Reports, and Error Management. The top header includes the title 'National Background Investigation Services', a search bar 'Search Subject by SSN', and user profile icons. The 'Advanced Search' section includes a checkbox for 'Include Subjects in My Hierarchy', two 'Search Field' dropdowns (one set to 'Access Level', the other to 'Organization'), and two corresponding filter boxes (one set to 'Top Secret', the other to 'Defense Counterintelligence...'). At the bottom right, the 'Submit' button is highlighted with a yellow box.

10. View the **Total Results** to see how many subjects apply to your search.

The screenshot shows the 'My Subject List' page. The left sidebar is identical to the previous screenshot. The top header is also identical. The 'My Subject List' section includes a search bar, a checkbox for 'Include Subjects in My Hierarchy', and a 'Refine Search' section with filters for 'Access Level: Top Secret' and 'Organization: Defense Counterintelligence and Security Agency/1000C'. The 'Total Results' is displayed as '1' and is highlighted with a yellow box. Below the filters is a table with columns: SSN, Last Name, First Name, Citizenship, Organization, Determination, and Determination Status. The first row of the table is highlighted with a yellow box.

SSN	Last Name	First Name	Citizenship	Organization	Determination	Determination Status
	Ball	Lucille	United States	Department of Security Managers 1/1005P, Training Team NBIS/1002H, Defense Counterintelligence and Security Agency/1000C, Test FSO/10076	Suitable/Fit, Top Secret	Active

11. Select the **SSN** hyperlink to view the subject's worksheet.



National Background Investigation Services

Search Subject by SSN

Subject Management

My Subject List

Subjects in your organization are listed below. To include all subjects in your hierarchy, select the checkbox. Select the Advanced Search link to specify fields to search for.

Search

Search on All Fields ☐ Include Subjects in My Hierarchy

Refine Search

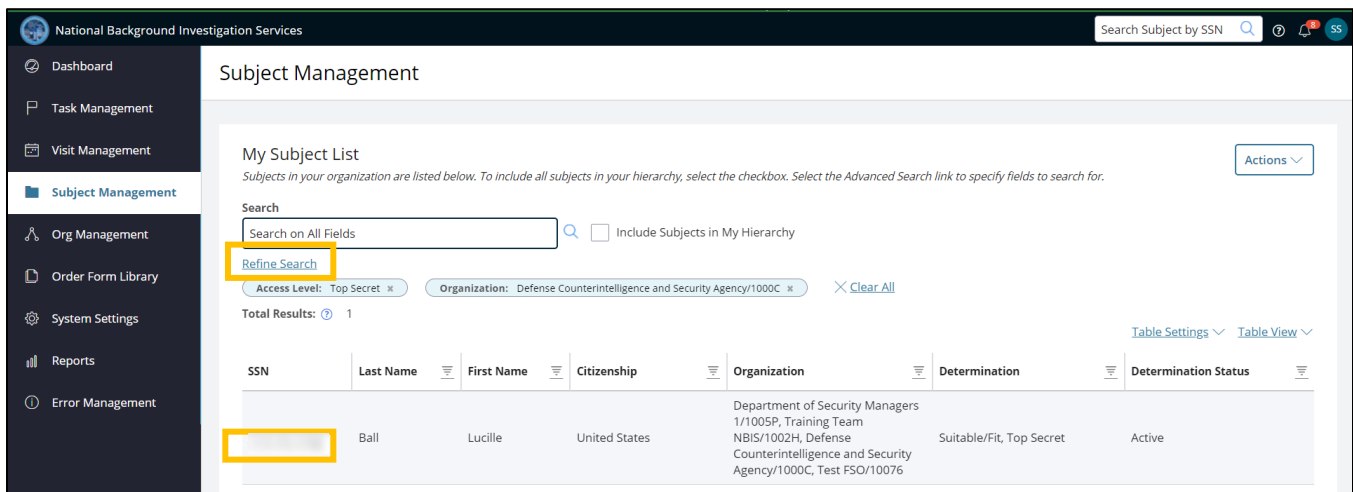
Access Level: Top Secret Organization: Defense Counterintelligence and Security Agency/1000C Clear All

Total Results: 1

SSN	Last Name	First Name	Citizenship	Organization	Determination	Determination Status
[SSN]	Ball	Lucille	United States	Department of Security Managers 1/1005P, Training Team NBIS/1002H, Defense Counterintelligence and Security Agency/1000C, Test FSO/10076	Suitable/Fit, Top Secret	Active

12. The following actions are available to edit the results after performing an advanced search:

- Select **Refine Search** to go back into the Advanced Search screen and change the fields.



National Background Investigation Services

Search Subject by SSN

Subject Management

My Subject List

Subjects in your organization are listed below. To include all subjects in your hierarchy, select the checkbox. Select the Advanced Search link to specify fields to search for.

Search

Search on All Fields ☐ Include Subjects in My Hierarchy

Refine Search

Access Level: Top Secret Organization: Defense Counterintelligence and Security Agency/1000C Clear All

Total Results: 1

SSN	Last Name	First Name	Citizenship	Organization	Determination	Determination Status
[SSN]	Ball	Lucille	United States	Department of Security Managers 1/1005P, Training Team NBIS/1002H, Defense Counterintelligence and Security Agency/1000C, Test FSO/10076	Suitable/Fit, Top Secret	Active

- b. Select **Clear All** to clear the search and select **Submit** to return to the default table view.

The screenshot shows the 'Subject Management' interface. On the left is a dark sidebar with navigation links: Dashboard, Task Management, Visit Management, Subject Management (highlighted), Org Management, Order Form Library, System Settings, Reports, and Error Management. The main content area is titled 'Subject Management' and contains a 'My Subject List' section. Below the title is a search bar with the text 'Search on All Fields' and a magnifying glass icon. To the right of the search bar is a checkbox labeled 'Include Subjects in My Hierarchy'. Below the search bar is a 'Refine Search' section with two pill boxes: 'Access Level: Top Secret' and 'Organization: Defense Counterintelligence and Security Agency/1000C'. A yellow box highlights the 'X' icon on the 'Organization' pill box, which is labeled 'Clear All'. To the right of the pill boxes is a 'Total Results: 1' indicator. Below this is a table with columns: SSN, Last Name, First Name, Citizenship, Organization, Determination, and Determination Status. The table contains one row with the following data: SSN (highlighted with a yellow box), Last Name: Ball, First Name: Lucille, Citizenship: United States, Organization: Department of Security Managers 1/1005P, Training Team NBIS/1002H, Defense Counterintelligence and Security Agency/1000C, Test FSO/10076, Determination: Suitable/Fit, Top Secret, and Determination Status: Active. In the top right corner, there is a search bar labeled 'Search Subject by SSN' and a user profile icon.

- c. Select the “X” next to the pill box of a specific search criteria used to eliminate that field from the search.

This screenshot is identical to the one above, showing the 'Subject Management' interface. The 'X' icon on the 'Organization' pill box is highlighted with a yellow box, indicating the action to be taken to clear the search criteria.

