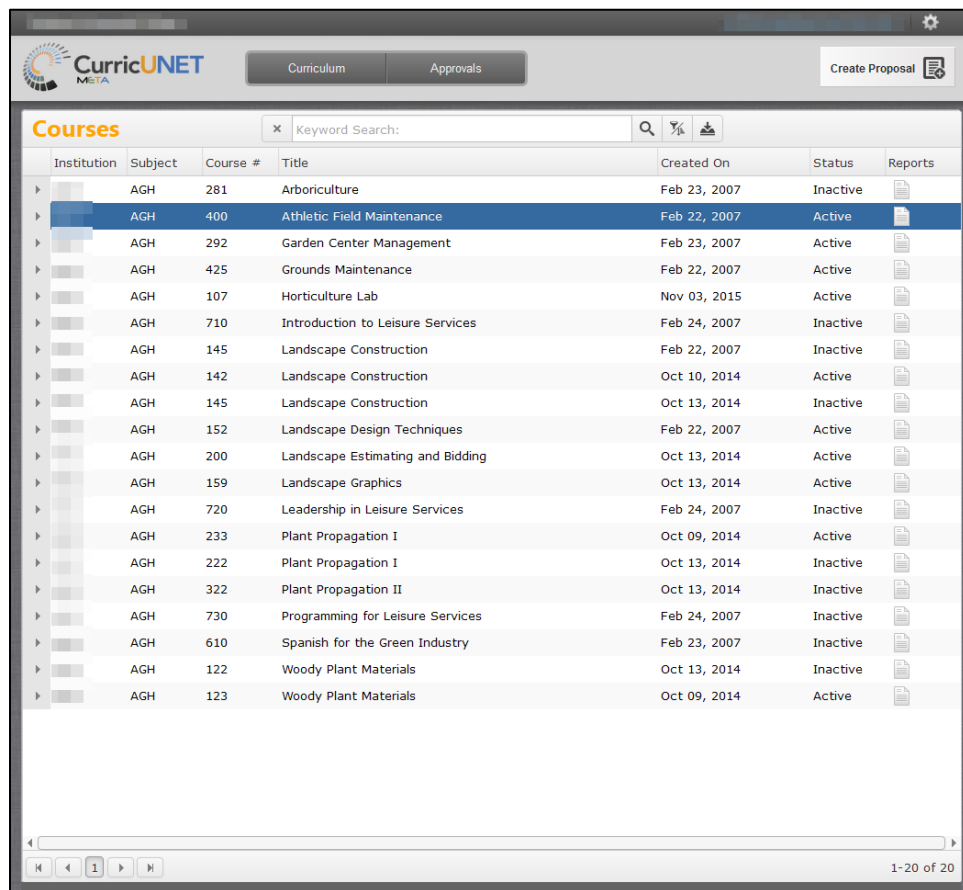## Introduction to the New META Search

CurrIQūnet is pleased to introduce the new META curriculum search feature. We hope that the increased functionality and more intuitive interface will improve your user experience and help your curriculum process run more smoothly and efficiently. While this enhancement is focused on the curriculum search screens, there are some associated user interface changes that will be visible across the site.

You may need to disable your internet browser's popup filter to access all new features. There may be slight user interface differences between district and single institution META configurations.

Institutions whose META sites are not yet live will be converted to the new search screens prior to their production date.

For live clients, this change will be implemented in two stages. Immediately upon release, both versions of the search screen will be available to admin users to allow you to acquaint yourselves with the new feature and update any local training or help materials your college has for your users. Once you have had a chance to make those updates, the new search screens will be activated for all users and the previous version deactivated on your

site. You will receive additional information on the implementation of this change from your currIQūnet project manager.

Please contact your project manager or the currIQūnet support team with any questions or concerns. As we receive user feedback on this enhancement, we may make minor changes to available columns and instructional text over the next few releases.

We are updating the currIQūnet META user manuals with this information and will distribute the updated versions to you shortly.

Using the New Search Screen

All screenshots in this guide will be from the course search, but the appearance and functionality is the same across all curriculum types. Depending on your institution's configuration, you may see more or less columns than appear in the screenshots of the search results, but your search filters and the functionality are as described.

Upon logging in, the default view will be courses in all statuses originated by the user.

Keyword Search

Enter search terms in the **Keyword Search** text box, marked "1" in the screenshot below. Click the magnifying glass icon to the right of the box to apply this term, or the x icon to the left to remove the term. Only items that meet the criteria of both the keywords and filters applied will appear in the results.

The keyword search searches the hierarchy, proposal title, and proposal description. The search engine will search for the exact phrase entered, including any spaces or numbers. Adding a comma between keywords will add an implicit "or" to the search. For example, "cell biology" will search for that exact phrase, but "cell, biology" will search for all proposals that include the word "cell" or the word "biology" in their hierarchy, proposal title, and proposal description.

	Institution	Subject	Course #	Title		Created On	Status	Reports
▶		AGH	281	Arboriculture		Feb 23, 2007	Inactive	

Filtering Search Results

Add filters to your search results by clicking the **Search Options**, or funnel, icon, marked "1" in the screenshot below.

After clicking the icon, a window will open for you to select any applicable filters. Multiple filters can be applied from this window, as highlighted by the numbers in the screenshot below.

Scope Filter

Use the **dropdown menu**, marked "1" in the screenshot below, to select the scope of the search. Only one filter from this menu can be applied to a search at a time.

<mark>Filter options include:</mark>

- **Show only my proposals:** Only proposals meeting the other search criteria originated by the user will be returned.
- **Show all proposals for my institution:** All proposals at the institution meeting the other search criteria will be returned.
- **Show proposals for all institutions:** For clients with district configuration *and* when the user has roles at more than one institution in the district, all proposals at all institutions where the user has roles will be returned.

Hierarchy Filter

The **Hierarchy Filters**, marked "2" in the screenshot below, vary by curriculum type. For courses and packages, you will filter by Subject. For all other curriculum types, you will filter by Department or Division. Hierarchy options will be collapsed under the institution title. To expand the hierarchy options, click the arrow icon to the far left of the institution, or click the checkbox to include all hierarchy levels in your search.

Select any categories to include in the search. To include all hierarchy groups in your search, select either *all* or *none* of these checkboxes.

Status Filter

Select any proposal statuses to include in your search from the **Status Filters** checklist, marked "4" in the screenshot below. Your institution may have different statuses than shown here. To include all statuses in your search, select either *all* or *none* of these checkboxes.

Sort Options

To sort the search results, select from the **Sort Options** checklist. Items in the search results will sort in descending order based on the columns selected. Click the checkbox labeled what to sort in ascending order. Sort options can be drag and dropped to prioritize the sort order.

Apply Search

To apply the search criteria selected in the Search Options window and view results, select the **Apply** button. To close this window without making changes to the search criteria, click **Cancel**. These options are marked "5" in the screenshot below.

Using Search Results

Search results can be exported to several formats for review offline. Select the **Export** icon to download the document.

Select the file format from the dropdown menu.

A file in the specified format will download to your computer with the search results in a table format, as seen in the example below. You may need to authorize the download.

Get additional information about the proposal in the search results screen by clicking the arrow to the left of the proposal title.

This will open a summary of the proposal with additional identifying details. Click the arrow again to close the summary. You can view multiple summaries at the same time.

Search results are paginated to more easily access items in the search results. Navigate between pages using the navigator at the bottom of the screen, marked "1" on the screenshot below. The result range, marked "2" in the screenshot below, indicates the visible proposals and the total number of proposals that meet the search results.