

# How to Search in ePlanning

## Using Search, Filter or Advanced Searching

May 2019

There are three main searching options available in ePlanning:

- The Search field
- The Filter bar and
- Advanced Search



### The Search Field

At the top of the screen is a generic search field.

1. Click into the **Search** field
2. Type the text to search for
3. Click the icon (magnifying glass) or press **Enter**

This field will look for matches for any string entered (e.g. an address or street name, a DA number or an A-number), in any record type, and return the results on a screen you can tailor:

Case type	Description	ID	Status	Updated
Concurrence and Referral	Concurrence and Referral	CNR-1276	Awaiting agency review	12/02/19
	Concurrence and Referral	CNR-1240	Additional information requested	17/01/19
	Concurrence and Referral	CNR-1218	Under assessment	16/01/19
	Concurrence and Referral	CNR-1166	Refused	15/01/19
	Concurrence and Referral	CNR-1149	Under assessment	14/01/19
	Concurrence and Referral	CNR-1151	Awaiting payment	14/01/19
	Concurrence and Referral	CNR-1117	Under assessment	9/01/19

In the example above, part of an address, *1 Como St*, was entered into the Search Field. The results include any record type containing that string.

4. Use the drop lists at the top of the results window to **filter** the results further (eg use the **Last Updated** droplist to display work from the last 7 days only).
5. Use the **ID** links to open individual records.
6. Click the **icon** in the **Search** field (the magnifying glass) to redisplay the search results at any time.

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### The Filter Bar

Across the top of any screen display (eg Dashboard or Active Work) are column headings that can be used to sort the contents of the current display:

Performance	Days Lapsed	Reference Number	Site Address	Status	Application Type
<span style="color: green;">●</span>	29	A-1650	6 Como Road, Oyster Bay, 2225	Action required	Concurrence and Referral
<span style="color: green;">●</span>	15	A-1711	39 Cowan Street, Oyster Bay, 2225	Additional information requested	Concurrence and Referral

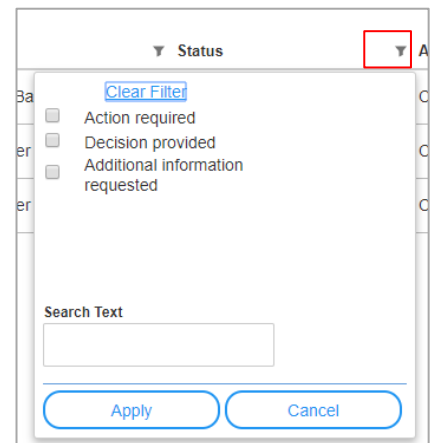
Each column heading also has a **small filter symbol** to its right (in the example shown above, the filter icon highlighted will filter the Site Address column), that enables the filter and search function for that column.

To sort using the Filter bar

1. Click on any column title to sort by that column (ascending order – low to high). Click again to sort in descending order (high to low)

To search and filter using the Filter bar:

1. Click the filter icon for the column containing the information you want to filter/search. (In the example to the right, the filter icon for the Status column was used)
2. To filter, click to select one or more entries.
3. Click the **Apply** button. The filtered results display and the filter icon on the column that was used changes to blue (shown below):



To clear or reset filters:

4. Click the filter icon again
5. Click the **Clear Filter** link at the top. The results will reset.

To search within the column:

6. Click the filter icon to display the panel
7. Click into the **Search Text** field

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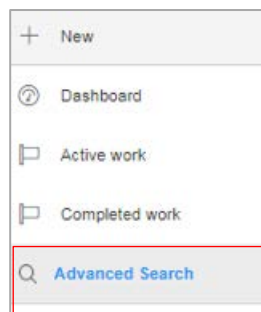
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8. Type the text to search for (eg keyword)
9. Click the **Apply** button

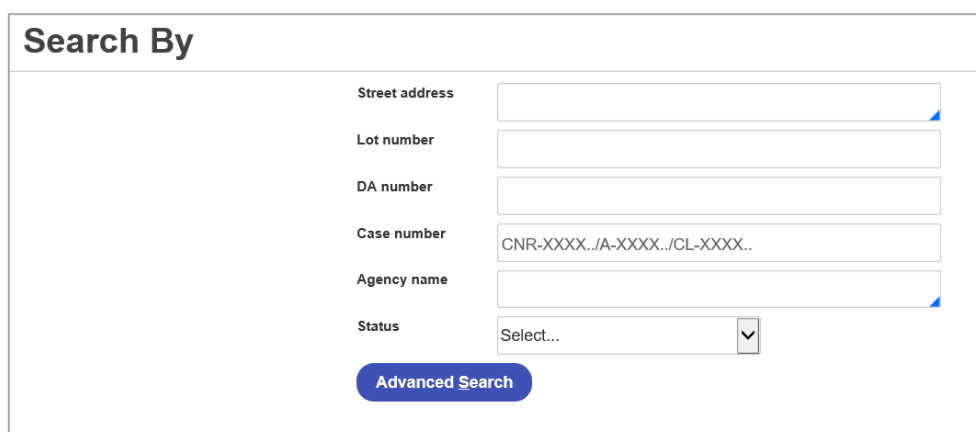
Results including the keyword you searched for will display. Use steps 4-5 above to clear.

## Advanced Search

To locate a record amongst the myriad of cases kept within the online system, use the “*Advanced Search*” functionality. This tool allows you to search using multiple criteria if needed.



1. Click “*Advanced Search*” on the left-hand side of your dashboard. The **Search By** screen displays, showing the multiple criteria fields that can be used to search:

A screenshot of a web form titled 'Search By'. The form contains several input fields: 'Street address' (empty), 'Lot number' (empty), 'DA number' (empty), 'Case number' (with a placeholder 'CNR-XXXX../A-XXXX../CL-XXXX..'), 'Agency name' (empty), and 'Status' (a dropdown menu with 'Select...' and a downward arrow). Below the fields is a blue button labeled 'Advanced Search'.

2. Enter the details of what to search for. You can use as few fields as needed, but note the more fields you use the more exact your results can be

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- **Street address:** As you type, the address will auto-populate. This is the primary address input when council created the Concurrence and Referral case.
- **Lot number:** Similarly, this is the Lot number input when council created the Concurrence and Referral case. This field is free text and is an exact data match when advanced searching. Be sure to input full form of the Lot number (no partial data searches).
- **DA number:** This is the development application reference number. This field is free text and is an exact data match when advanced searching (no partial data searches).
- **Case number:** This is the online automatic system generated reference number.

For parent concurrence and referral cases, the system generated case number will begin with "CNR-". Agency child concurrence and referrals will have a system generated case number beginning with "A- " or "CL-" for Biodiversity clause assessments.

This field is a free text field. You will have to input the full case reference number details into the field. The system will not pick up partial numbers.

- **Council Name:** As an Agency, you will be able to search cases by Council name. As you type, a pre-populated dropdown list of Councils within the state will appear.
- **Agency Clause:** This is the Agency clause reference number beginning with "A- " or "CL- " for Biodiversity clause assessments. You will have to input the full clause reference number into the field. The system will not pick up partial numbers. As you type, this is a pre-populated dropdown list that will pick up clauses relevant to your agency only.
- **Status:** This is the status of the case as it stands within the overall end to end workflow. This is a dropdown list that allows you to select the status you need.

See *HowTo understand the end-to-end concurrence and referral online workflow* for a more detailed guide on the online concurrence and referral process.

3. Click the **Advanced Search** button to execute the search



The results will display at the bottom of the screen. Adjust the contents of the search fields and click Advanced Search again, if needed

4. Click the **case reference number** hyperlink to view case details.



Once you have clicked on a hyperlink, you will lose the results of your advanced search as your window will leave the advanced search results page and load the case details. A work around to retain the results of your advanced search is to right-click on the Reference Number hyperlink and open the case in a new tab.



Only one user can work on a case at a time. If you intend to edit a case at the same time, a message will come up to notify you that the case is locked.

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If you need more information:

If you need assistance, please contact [eplanning@planning.nsw.gov.au](mailto:eplanning@planning.nsw.gov.au)