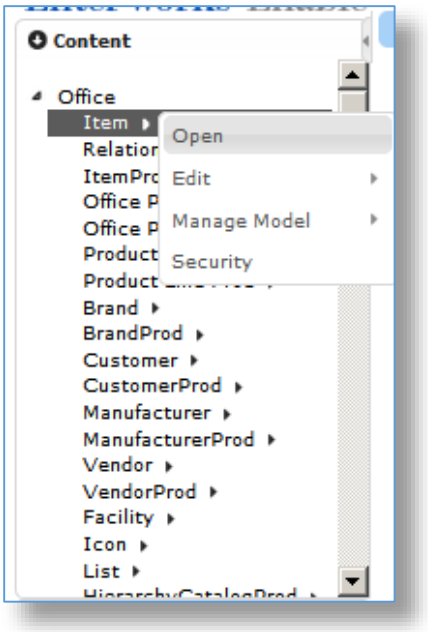
Searching Repositories

When viewing a repository via the Content feature, the default shows all records in the repository in a paged format. The user can change the number of records displayed per page. The displayed records can be filtered by performing three types of searches: Basic Search, Predefined Search, and Advanced Search.

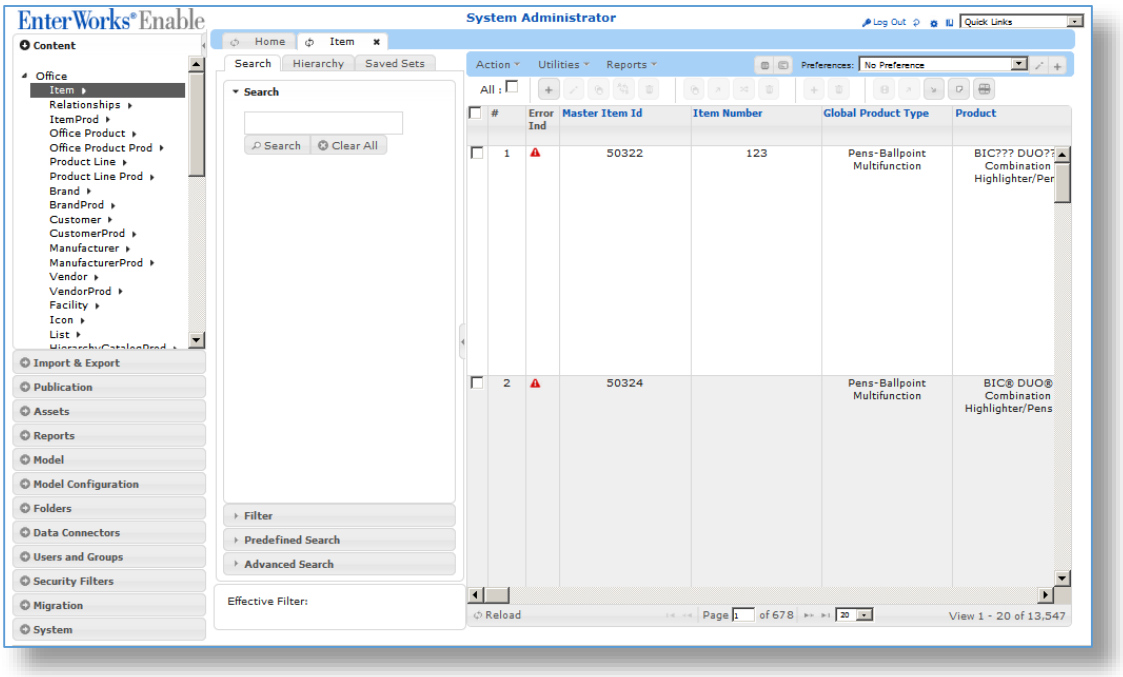
Performing a Basic Search

The simplest search is a Basic (or Keyword) search. For this search, the user enters one or more keywords prompting Enable to search every field in every record for a match. If a match is found, the record is included in the displayed table of records. Depending upon what is entered for the keyword(s), the search may show a single record or several records. For example, if the user enters a material number, the record containing that number in the material number field will be shown. The record will also be shown if that material number is referenced in any other field in the same record. If that material number is referenced in any other field by another record, that record will also be shown. In general, the more unique the keyword(s) the fewer records will be found. A Basic search can be executed by performing the following steps:

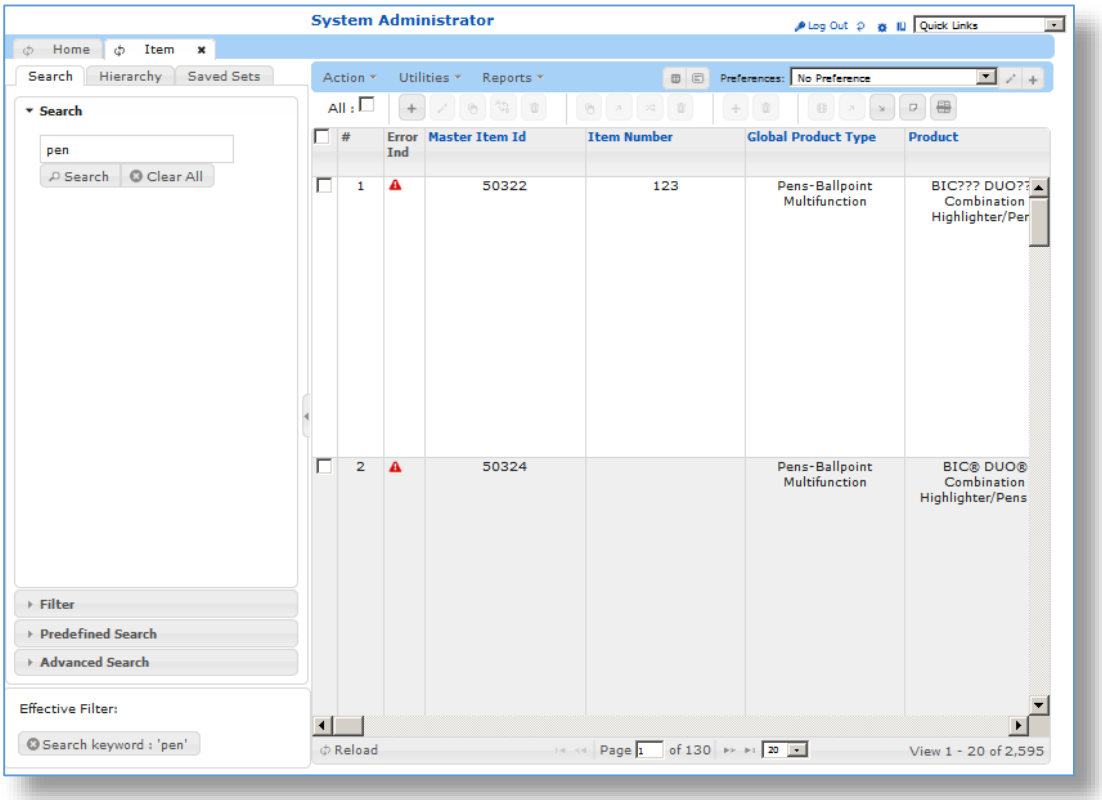
1. Open the desired repository.



2. The repository displays, showing all records in the repository in the far right panel:

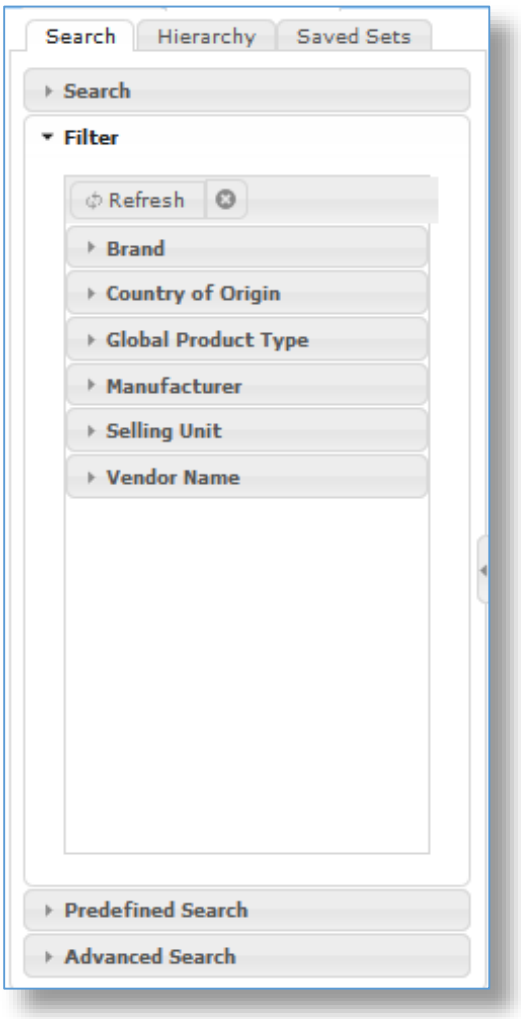


3. Enter a search keyword (or keywords) in the Search field on the Search tab and click **Search** or press the **Enter** key. The repository is searched for the specified keyword(s) and the matching record(s) are displayed.



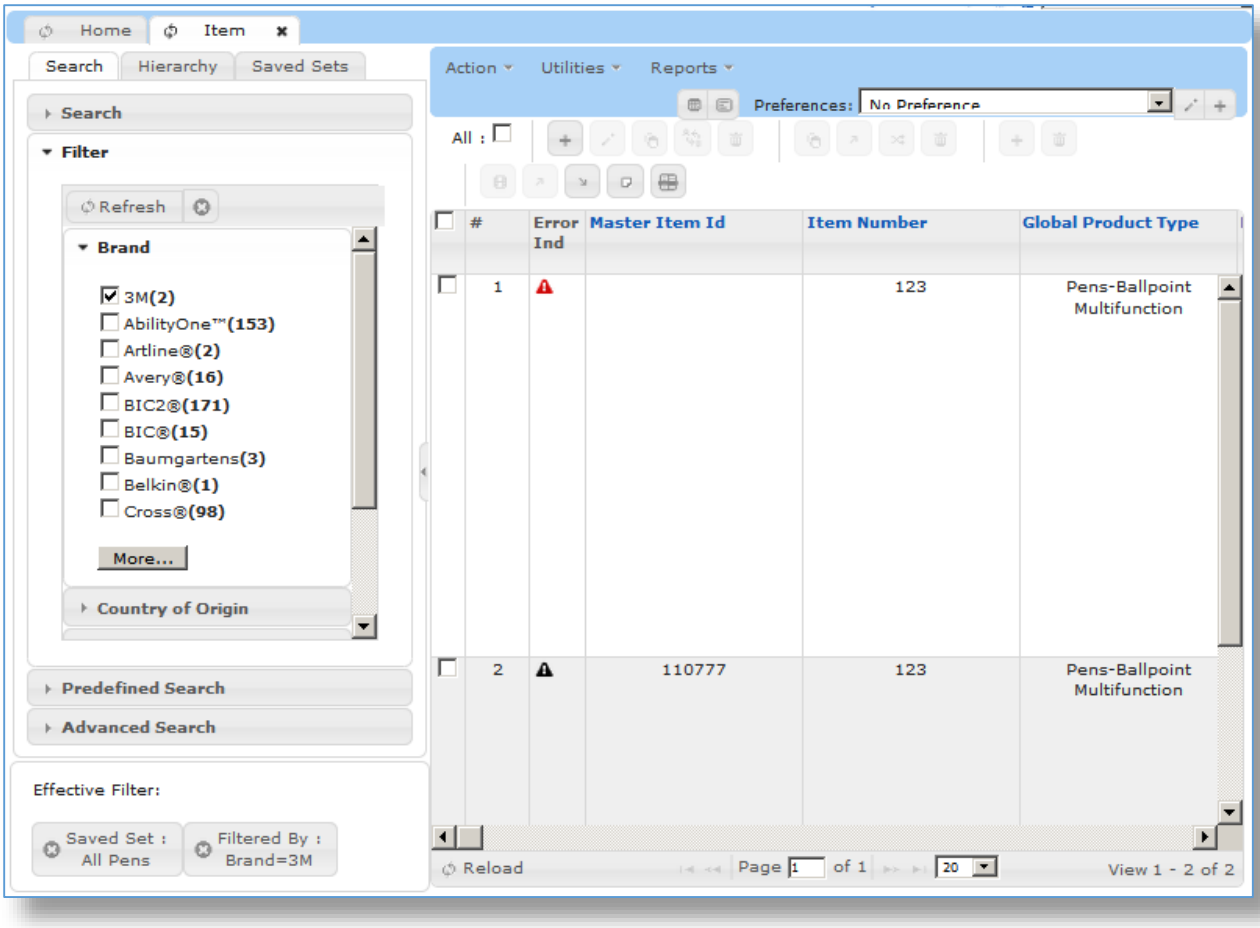
Applying a Filter

Filters are set by the System Administrator to filter a repository's results by specific field values. When a filter has been opened a query is run and each value is shown with the number of records that contain that value as shown below:



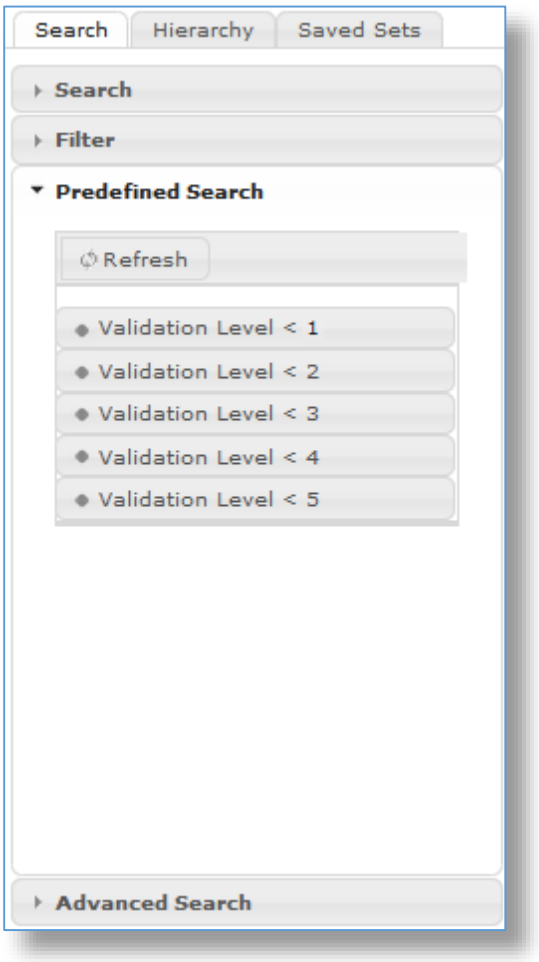
Note: When multiple filters are applied within one field or across fields, a record is returned if it satisfies any of the different criteria (in other words it will use the OR criteria). Also, if a Saved Set is being viewed, the filter will show values and counts applicable to the Saved Set only.

For example, the screen below shows that the Saved Set of **All Pens** has been applied (see the **Effective Filter** section on the bottom left). Then when the Brand filter is run, it shows all pens that have been made by that brand.


Home
Item
Search
Hierarchy
Saved Sets
Search
Filter
Refresh
Brand
3M(2)
AbilityOne™(153)
Artline®(2)
Avery®(16)
BIC2®(171)
BIC®(15)
Baumgartens(3)
Belkin®(1)
Cross®(98)
More...
Country of Origin
Predefined Search
Advanced Search
Effective Filter:
Saved Set : All Pens
Filtered By : Brand=3M
Action
Utilities
Reports
Preferences:
No Preference
All :
Error Ind Master Item Id Item Number Global Product Type
1 123 Pens-Ballpoint Multifunction
2 110777 123 Pens-Ballpoint Multifunction
Reload
Page 1 of 1
20
View 1 - 2 of 2

Executing a Predefined Search

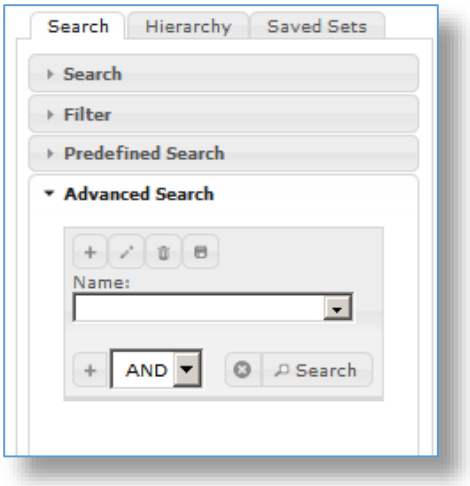
A Predefined search is an Advanced Search created and shared by a System Administrator (see the Performing an Advanced Search section below). The Predefined search data can only be executed and not modified by other users.



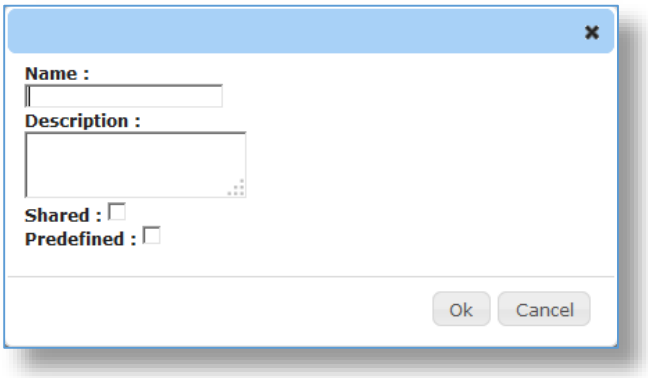
Creating an Advanced Search

While the Basic search is adequate for many searches, it is sometimes necessary to limit the search to specific attributes or to search on more than one attribute or value. The Advanced Search provides this capability. An Advanced Search can be created by performing the following steps:

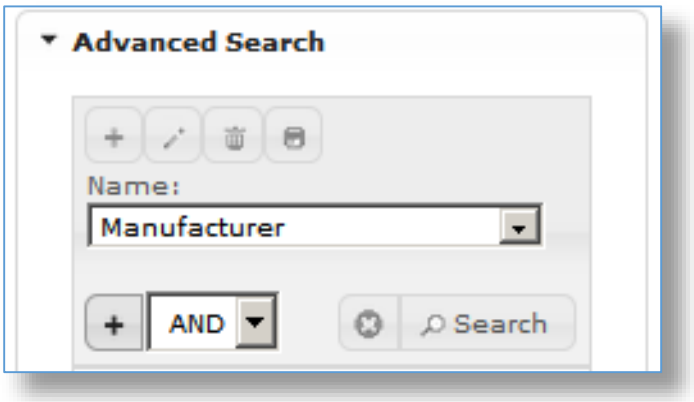
1. Select the desired repository via the **Content** feature.
2. Click on the **Advanced Search** link on the bottom left-hand side of the page. The **Advanced Search** fields appear:



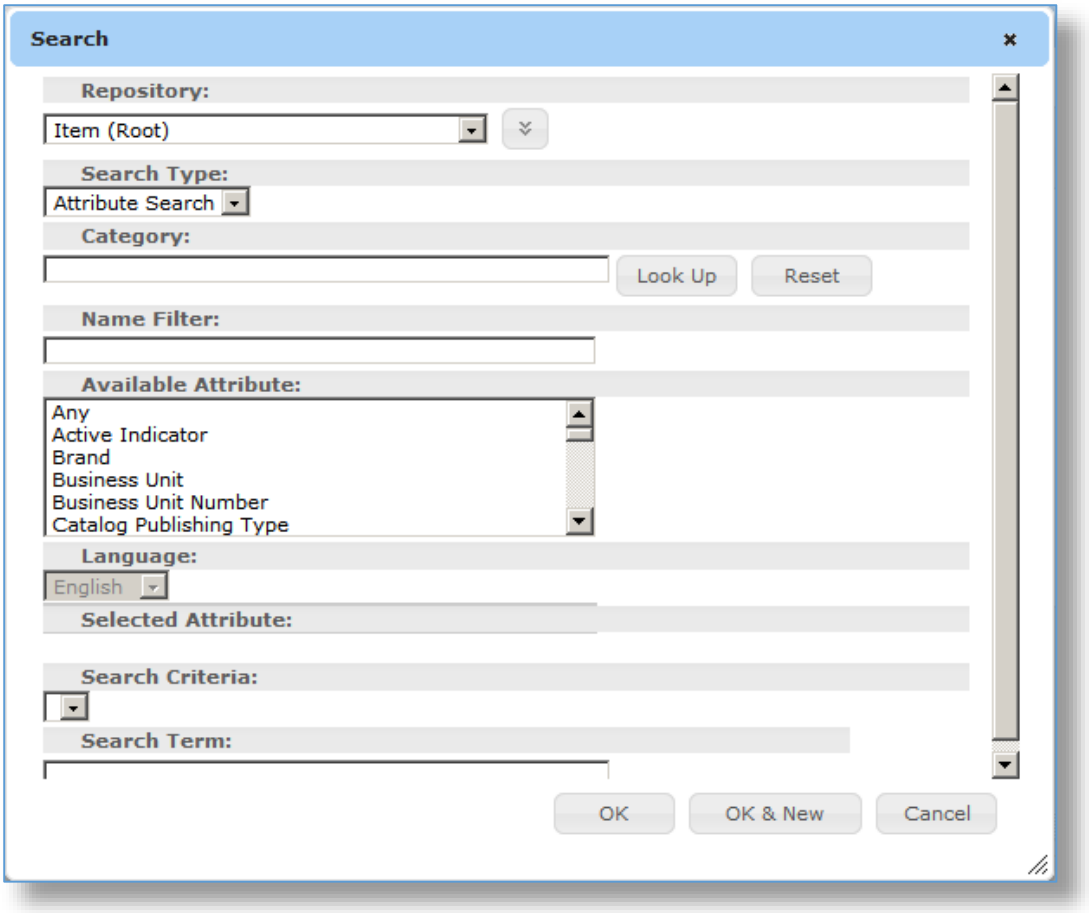
3. Click the plus sign placed to the left of the pencil icon in the **Advance Search** controls.
4. A new search dialog window appears:



5. Enter a **Name** and optional **Description** for your advanced search.
6. Click the **Ok** button.



7. Click the **plus sign** above the search **Name** selection list to add a search condition and the Search condition window will appear:

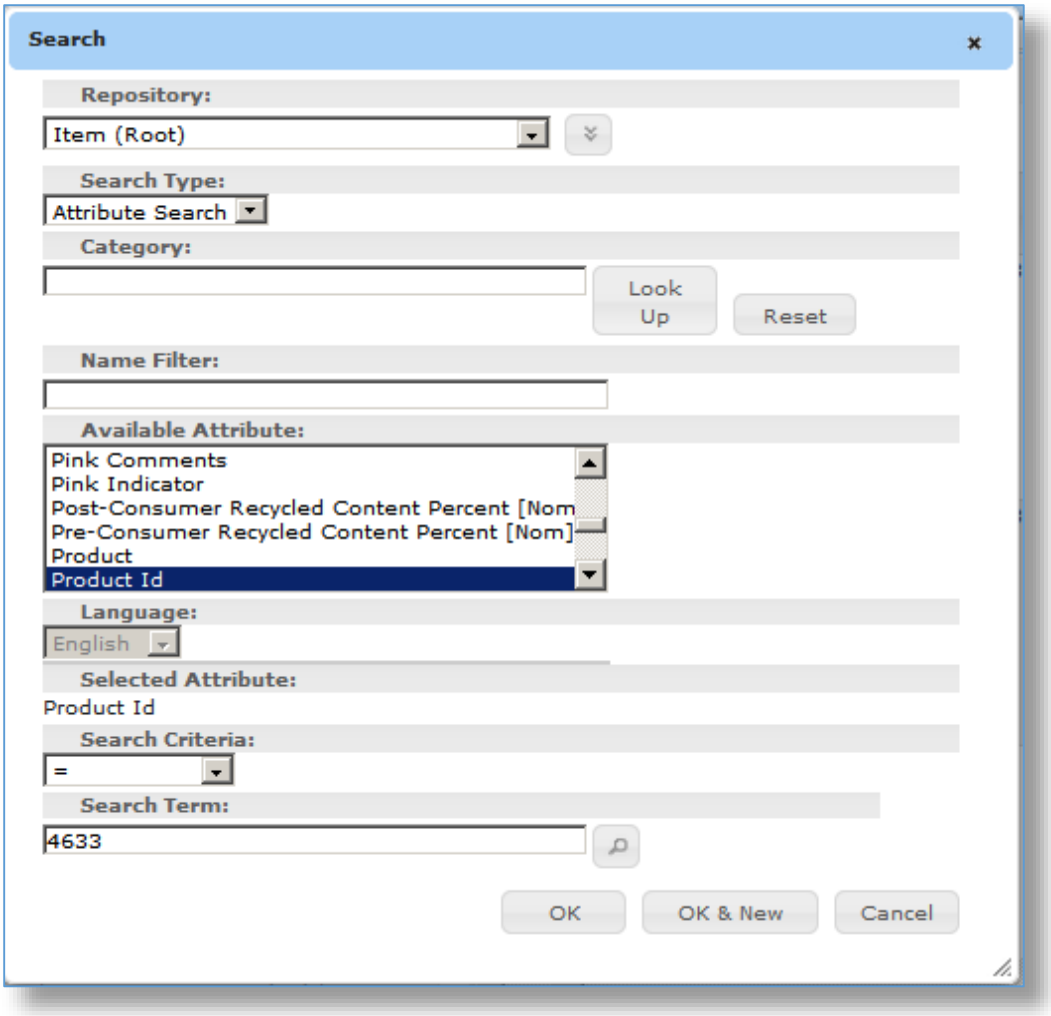


7. Select the **Search Type** for the search condition, either **Attribute Search** or **State Search**.

8. Select the **Attribute** to be used in the search condition. For example, the Product ID attribute was selected below.

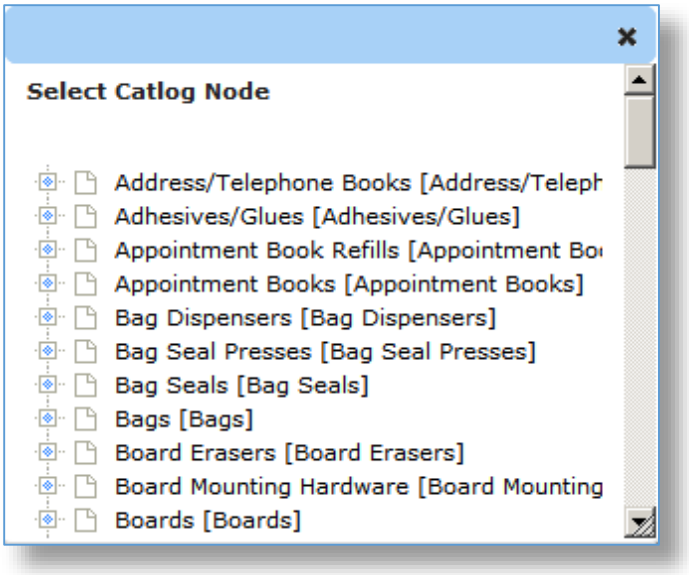
9. Select the **Search Criteria** operator for the condition. For example, the "=" operator was selected below. The list of options will vary depending upon the data type of the selected attribute (numeric, text, or code set) and whether it is a snapshot table column (an indexed field). See your system administrator for more info on snapshot table columns.

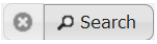
10. Enter the value for the search condition if applicable. For example, the value of "4633" was entered below.

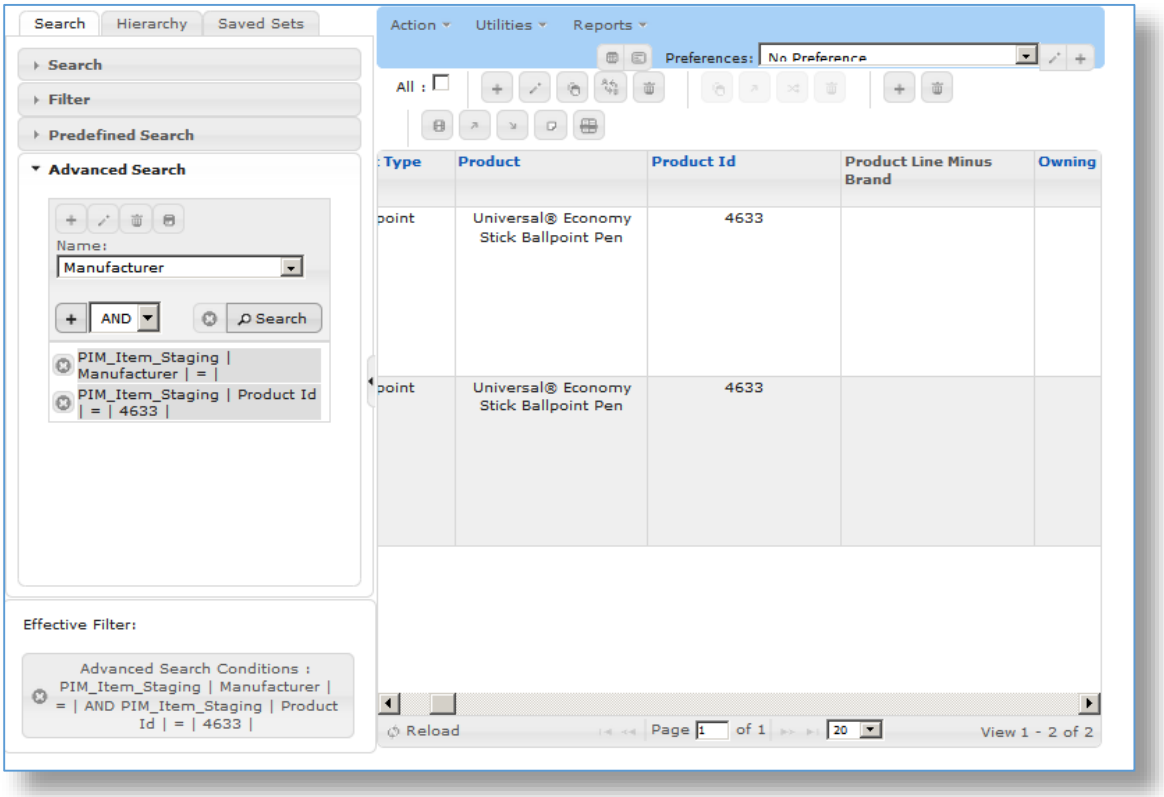


Note: If the attribute is associated with a code set the lookup button will list the value options. The magnifying glass will also show how many records have each value option.

11. Click the **OK** button to return to the repository list or **OK & New** button to save this criteria and open a new search criteria window.

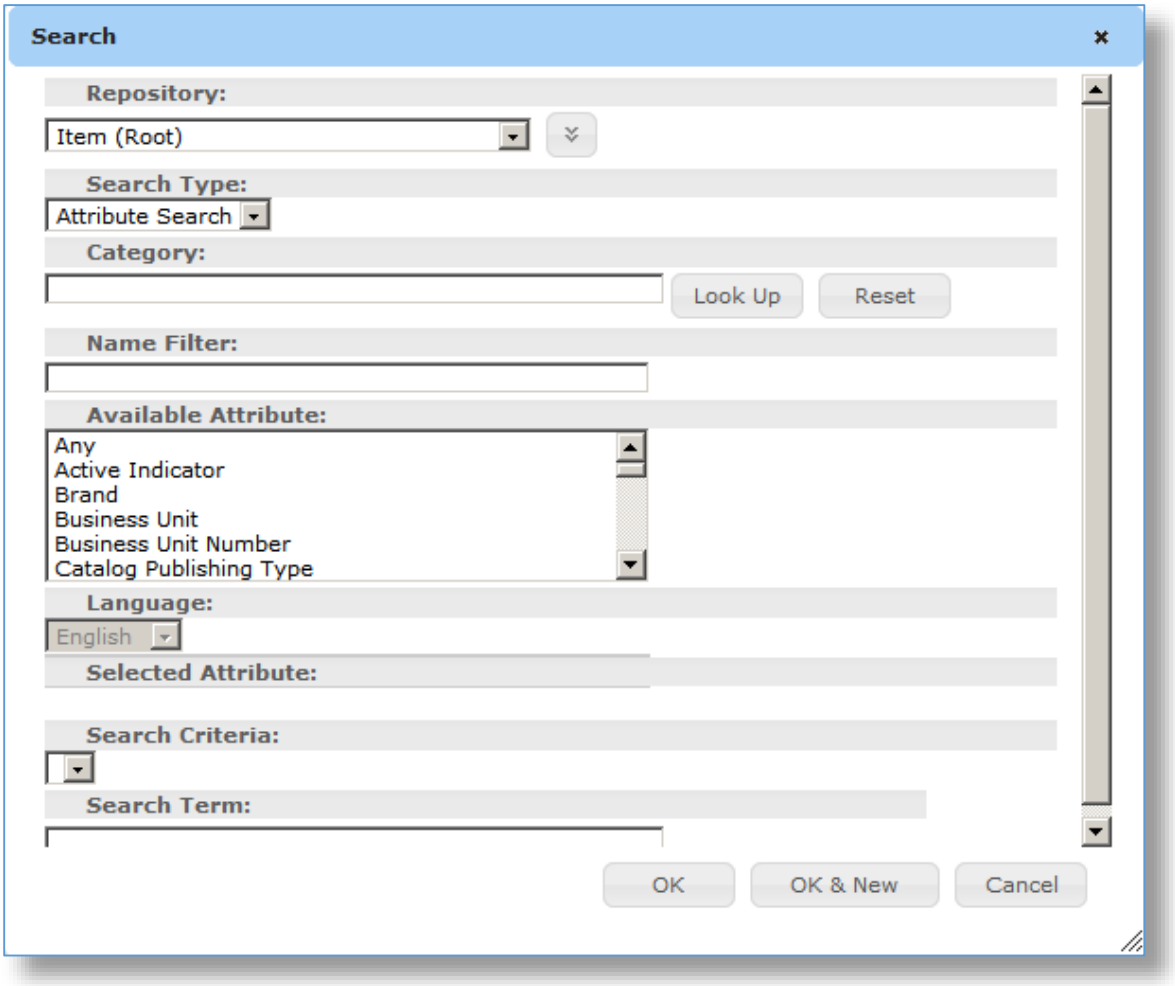


12. Click the Search button  below the search Name selection list. The advanced search is executed and the matching rows are displayed.

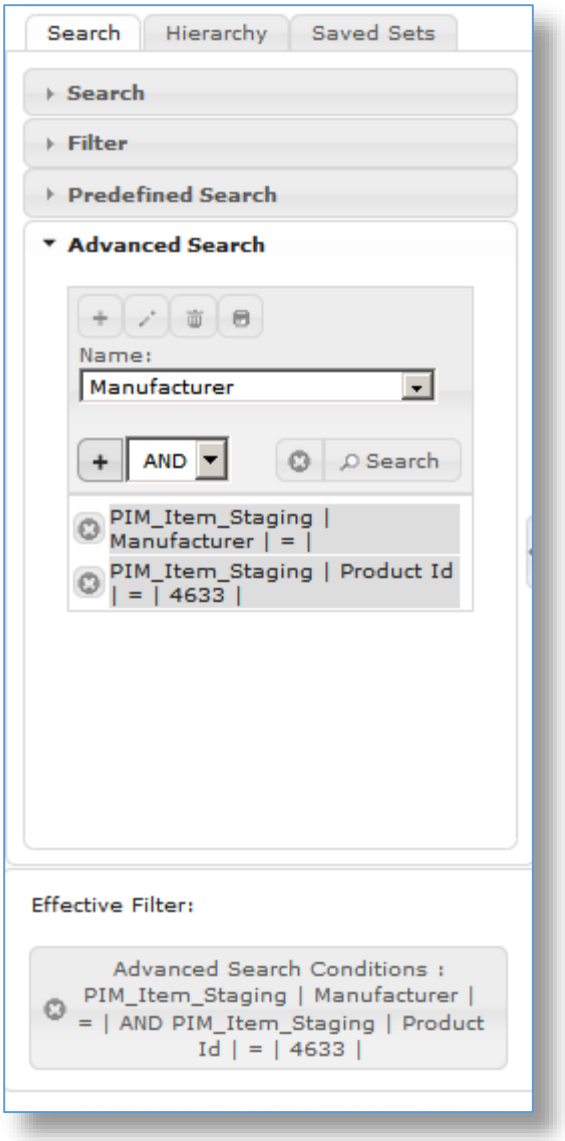


13. If additional search conditions are desired, select the appropriate Boolean logic operator (**AND** or **OR**) from the drop-down list and click the Plus sign to the left. A new condition is added to the search.

    Note: If the "**AND**" is specified, records must match all conditions in order for a record to be included in the results. If the "**OR**" condition is selected, records that match any one of the selection criteria will be returned.



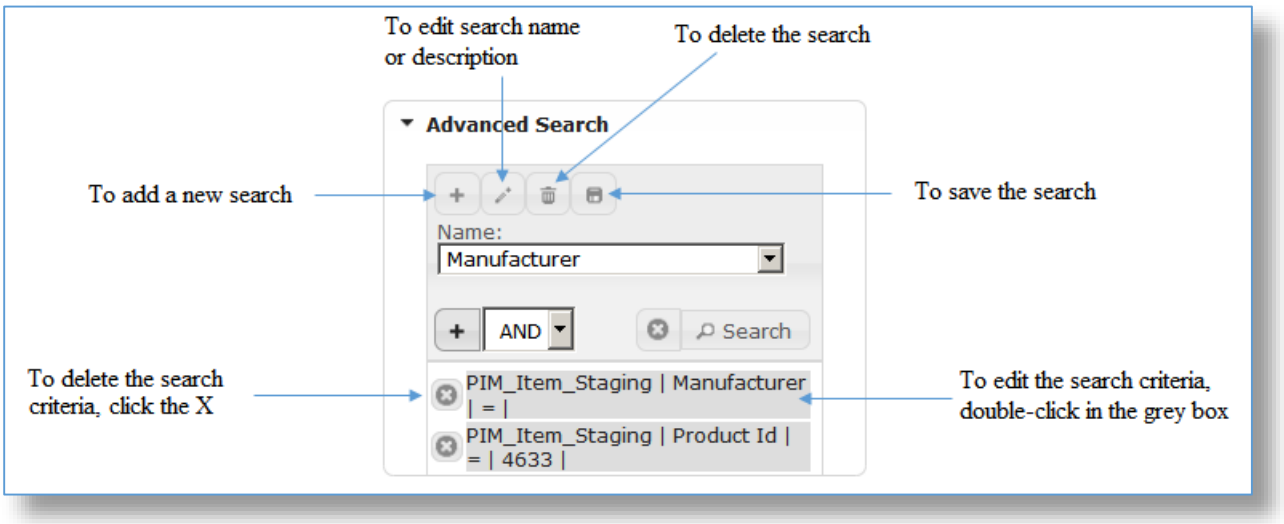
14. Select the desired **Search Type, Attribute,** and **Search Criteria** for the new condition.
15. Click the **Save** or **Save & New** button for additional search criteria.
16. When you're finished entering the search criteria and are back to the repository list, click the **Search** button to execute your Advanced Search.



17. Click the **Save** button.

Modifying a Saved Advanced Search

Once an Advanced Search has been saved, it can be modified later, if required. If the Advanced Search has been created and shared by another user, only that user can modify the Advanced Search.

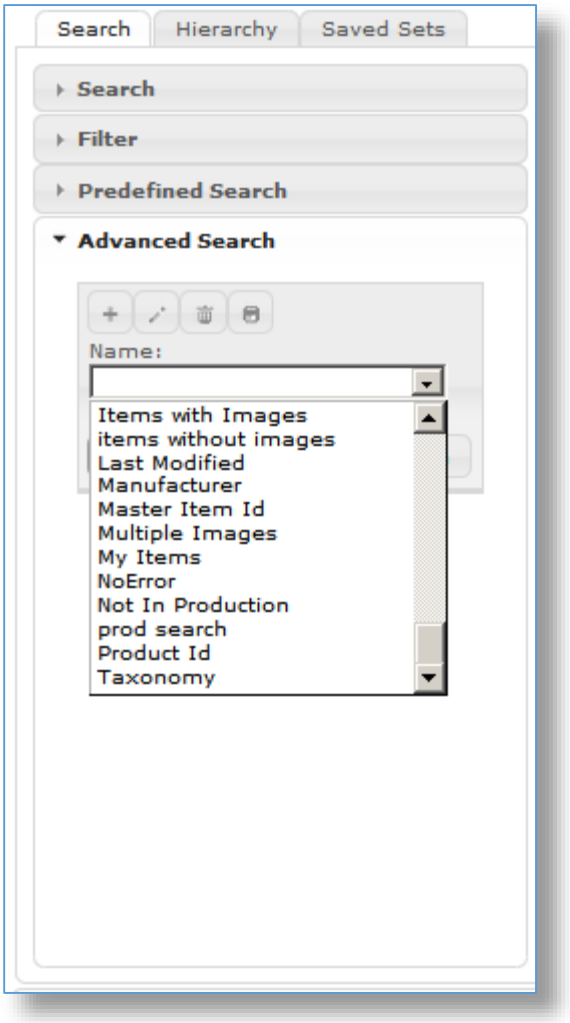


Note: Remember to click the **Save** button to apply any change to the Advanced Search. An Advanced Search created by you can be modified, executed, and saved, but if it was created by another user it can only be modified and executed, not saved.

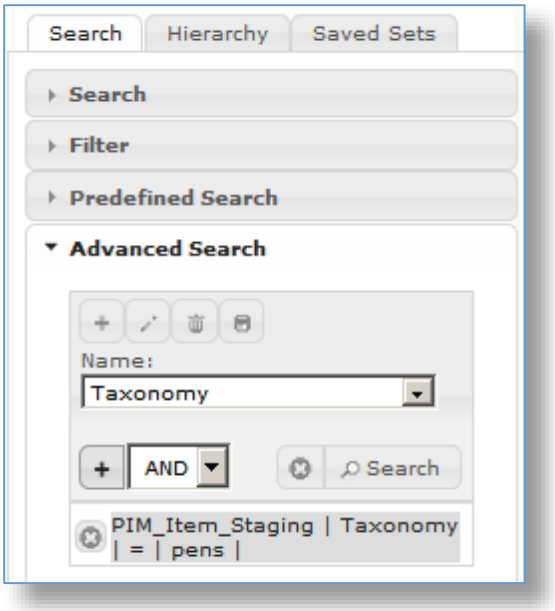
Executing a Saved Advanced Search

Once an Advanced Search has been saved, it can be selected and executed again by performing the following steps:

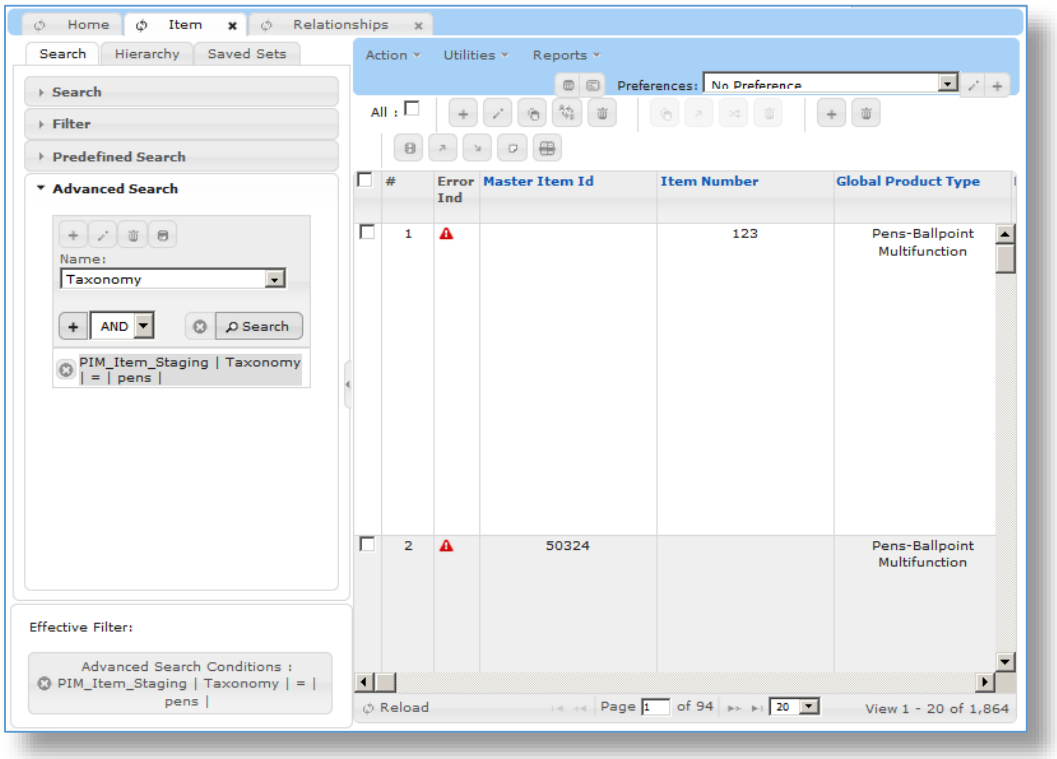
1. Select the desired repository via the **Content** repository folder.
2. Click **Advanced Search** option in the bottom middle frame.
3. Select the desired **Advanced Search** from the Name drop-down list.



4. The conditions for the selected search are displayed.



5. Double-click the **search criteria** condition to optionally modify the values of a condition or add more **search criteria**.
6. Click the **Search** button below the Name drop-down list. The search is performed and the results are displayed.



7. Click the **Save** button if you'd like to save the search criteria changes to the Advanced Search.