Using Searches

This system helps you find the information you need quickly and easily, no matter where you are.
Through each application's landing page and its search card, you are just a few taps away from finding the records you need.
This course will show you the primary search features found in each application.
There are other search features we won't explore here, like BAQ searches and Quick searches. Review Help & Support for details on those search tools.

Objectives

In this course we will start on the Landing Page and look at options for finding records in this grid.
Then we will use a Search Card, where most of the searching occurs.
And we will wrap up with a tour of the fields and buttons in the search card and results.

Search the Landing Page

When you first launch an application, like the Part Advisor, the landing page appears. This page immediately populates a grid with the application's first set of records.

Some applications may only have a few records, so you'll see them all right away. No searching required!

This Part Advisor has a lot of records. The landing page shows the first set of them and, as you scroll down, more records pull into this grid.

The landing page has some fields that can help filter what you see.

Tap this first drop-down list to limit the records. Right now, the All option displays, so the Part Advisor displays everything - manufactured, purchased, and sales kit parts.

There may be some prebuilt options you select here. But you can also link a custom business activity query, or BAQ, to this list. To learn about creating BAQs and attaching them to this list, review the Application Studio online help and courses.

Next to this drop-down list is the Part field. Tap in this field and enter a specific part number. *

Press Tab and the selected part appears in the Details page.

Then, to scroll through other part records or restore the landing page, use the Crumb Bar. The Crumb Bar is in the program's top left corner.

First, tap the arrow. A search menu displays.

Tap and drag the scroll bar to see more parts.

Select one, and this part's information now displays on the Details page.

Go back to the Crumb Bar and tap the Part Advisor link. The original landing page results display in the grid.

There's just one last thing to show you here. Every application has this search icon on its menu bar. Tap this icon to see the Enterprise Search panel. Use this panel to find any record in the database.

Using Search Cards

Each application has a search card you use to return a set of records. To use this card in the Part Advisor, tap the Search icon in the Part field.

The search card slides on with its fields and drop-down lists.

The default Search Type is Basic. But you can select other types of searches from this drop-down list, like Quick Searches and BAQ Searches. We will talk just a bit about those later.

Most search cards have a Sort By list and a Starting At field.

The Sort By list organizes how the search results display. This card sorts the results by either Part records or Search Words.

The Starting At field filters the results. Only records beginning with this first record appear, followed by subsequent records. Let's enter MRP in this field.

Now tap Search.

A grid displays. The top row contains the first part, alphabetically, that begins with MRP. Select its check box and tap OK.

The MRP part displays on the Details page.

Remove the search results by tapping Clear.

The Detail card also has search options.

Most cards have fields specific to records in their applications. In the Part Advisor or Detail search card, you can select both the Manufactured Part Type and the Active Part Status.

Tap Search. Only Active, Manufactured parts appear in the Results grid. That narrows the records down quite a bit!

Select the record you want and tap OK.

That's the main things you do on search cards.

There are just two more things to show you on the search card.

If you have a selection of records showing and you want to go back to the criteria, tap Clear Results

If you don't want to use the values you've entered, just tap Reset Search. That clears everything and you can start over.

Look Around

Search cards have fields and drop-down lists that help you return more targeted results. Tap each dot to review what the item does. When you're finished, tap the arrow to Continue.

Search Types are Basic, Quick Search, and BAQ. We've explored Basic. A BAQ search is built on a BAQ, or Business Activity Query, where parameters are set. So let's say you always need the list of parts to be filtered to a specific Product Group and Company. You build a BAQ with that criteria and use it as a BAQ Search. Using it will always filter to the Product Group and Company that is set in the BAQ. A Quick Search runs a BAQ also, but the users can manipulate result returned by entering in parameters for preselected fields in the BAQ. Other courses as well as Help and Support describe how you use these searches.

The Sort By field organizes how the search results display. This search card sorts the results by either Part record or Search Word.

The Starting At field narrows the results so that only records beginning with what you enter, and greater, display in the results grid.

Most search cards have fields specific to records within their applications. The Part Advisor search card can limit results by Part Type, Part Status, and Where Part Description Contains.

Where Description Contains allows you to type in a key word that is included in the description field.

Once you enter the values you want, tap Search. The Results grid displays the records which match your search values.

To remove the values you've entered, tap Reset Search. The search fields clear and you can start over.

Select the record or records you want using he check box in the left column. Then tap OK to view the records in the Details card.

To return to the search parameters, tap Clear Results.

Tap Cancel or the X to close the Search Panel.

Recap

And that's it. Let's recap what we've done.

We started on the Landing Page with the options for finding records in this grid.

Then we use a Search Card, the main tools for finding records.

And we ended with a tour of the fields and buttons in the search card and results.

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Corporate Office	**Latin America and Caribbean**	**Europe, Middle East and Africa**	**Asia**	**Australia and New Zealand**
804 Las Cimas Parkway	Blvd. Antonio L. Rodriguez #1882 Int. 104	No. 1 The Arena	238A Thomson Road #23-06	Suite 2 Level 8,
Austin, TX 78746	Plaza Central, Col. Santa Maria	Downshire Way	Novena Square Tower A	100 Pacific Highway
USA	Monterrey, Nuevo Leon, CP 64650	Bracknell, Berkshire RG12 1PU	Singapore 307684	North Sydney, NSW 2060
Toll Free: +1.888.448.2636	Mexico	United Kingdom	Singapore	Australia
Direct: +1.512.328.2300	Phone: +52.81.1551.7100	Phone: +44.1344.468468	Phone: +65.6333.8121	Phone: +61.2.9927.6200
Fax: +1.512.278.5590	Fax: +52.81.1551.7117	Fax: +44.1344.468010	Fax: +65.6333.8131	Fax: +61.2.9927.6298