



XC2 Saved Searches

Date: Mar. 5, 2009

XC2 Saved Searches 2009-0302

XC2 Saved Searches

Saved Searches allow the user to set and save search criteria for later recall. There can be many uses for Saved Searches.

- Monthly reports
- Route Sheets
- Personnel Lists
- Historical Data

Any search criteria that can be manually setup can now be recalled quickly by using Saved Searches.

Search Field	Operator	Value	Date Mod
[BFP Assembly]Equipment Type Code	Begins with	RP	
[BFP Assembly]Equipment Size Code	Is Greater Than or Equal to	Q200	
[BFP Assembly]Next Test Due	Is Less Than	*3M-3 Months*	

Buttons: Add Search Item, Delete Search Item, Select an Field to Search, Duplicate this Saved Search, Run This Search Now, Cancel, Save

Options: Must Match All Above Criteria, May Match Any of Above Criteria

Set up

In this example, we will demonstrate how to set up a Saved Search setup with the following parameters.

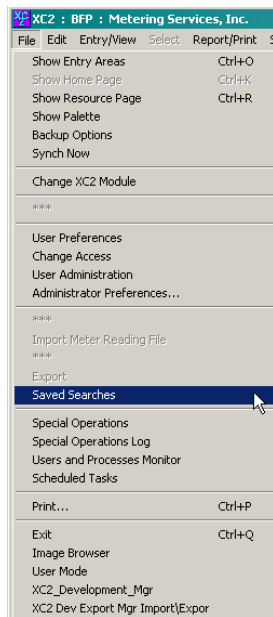
Device Type - RP

Size – 2”

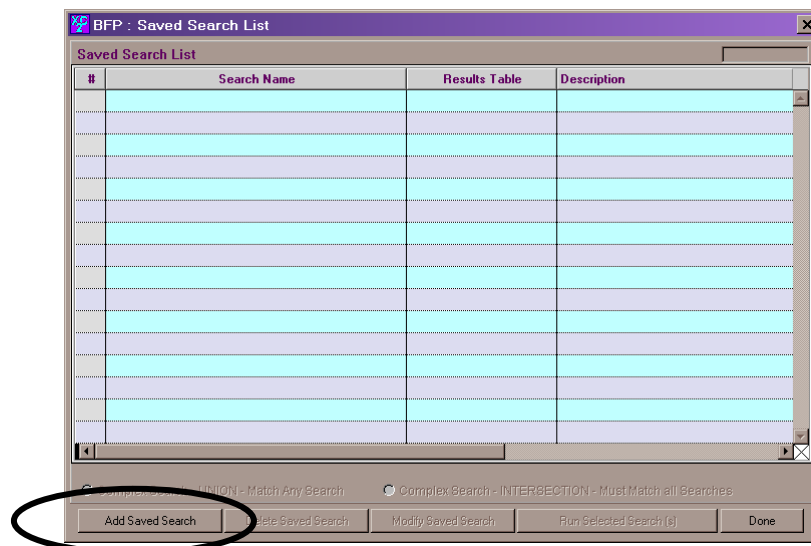
Next Test due in the next 3 months from current date

From the File menu

- Click Saved Searches



- Click Add Saved Search



When the Saved Search setup window opens, enter the following information.

- **Saved Search Name**
Enter a name that will help you identify the contents of the search.
- **Results Table**
Where the list be generated from; Facilities, Assemblies, Testers...
- **Description**
Enter a description for the Saved Searches resulting list.

Saved Search Setup System ID 10000001

Saved Search Name: Rps - Over 2" - Due to Be Tested Within 3 Months

Results Table: BFP Assembly Last Date Used: Records

Description: Get a list of Rps over 2" that have requiring testing

Created: Designer : 2009/03/05-15:40:21 Modified:

Search Field	Operator	Value	Date Mod

Exclude Inactive Records

Must Match All Above Criteria May Match Any of Above Criteria

- Click Add Search Item

The line item with pull down arrows are displayed

The screenshot shows the 'Saved Search Setup' dialog box. At the top, the title is 'Saved Search Setup'. Below the title bar, there are fields for 'Saved Search Name' (Rps - Over 2" - Due to Be Tested Within 3 Months), 'Results Table' (BFP Assembly), 'Last Date Used', and 'Records'. A description field contains the text 'Get a list of Rps over 2" that have requiring testing'. Below this, there are fields for 'Created' (Designer : 2009/03/05-15:40:21) and 'Modified'. The main area is a table with four columns: 'Search Field', 'Operator', 'Value', and 'Date Mod'. The first row contains '[BFP Assembly]Equipment Type Code' in the 'Search Field' column. Below the table, there are buttons for 'Add Search Item', 'Delete Search Item', 'Select an Field to Search', 'Duplicate this Saved Search', 'Run This Search Now', 'Cancel', and 'Save'. The 'Add Search Item' button is circled in red. At the bottom, there are radio buttons for 'Must Match All Above Criteria' (selected) and 'May Match Any of Above Criteria', and a checkbox for 'Exclude Inactive Records'.

Follow the progression of the outlined example for each criteria added

- Click the pull down for Search Field
(The list that will be displayed is too large to show here)
- Select Equipment Type Code

Continue to the Operator

- Click the Pull Down
- For this example, click Equals

The screenshot shows the 'Saved Search Setup' dialog box. The 'Saved Search Name' is 'Rps - Over 2" - Due For Testing in Next 3 Months'. The 'Results Table' is 'BFP Assembly'. The 'Description' is 'Get a list of RPs that are 2" that require testing in the next 3 months'. The 'Created' date is '2009/03/06-10:09:30'. The 'System ID' is '10000002'. The 'Search Field' is '[BFP Assembly]Equipment Type Code'. The 'Operator' dropdown menu is open, showing options: 'Begin with', 'Equals', 'Does not Begin With', 'Does not Equal', 'Contains', 'Does not Contain', 'Is Greater Than', 'Is Greater Than or Equal to', 'Is Less Than', and 'Is Less Than or Equal to'. The 'Equals' option is selected and circled. The 'Value' field is empty. The 'Date Mod' field is empty. The 'Must Match All Above Criteria' radio button is selected.

Search Field	Operator	Value	Date Mod
[BFP Assembly]Equipment Type Code	Equals		

For the Value

- Highlight field and enter Value

The screenshot shows the 'Saved Search Setup' dialog box. The 'Saved Search Name' is 'Rps - Over 2" - Due For Testing in Next 3 Months'. The 'Results Table' is 'BFP Assembly'. The 'Description' is 'Get a list of RPs that are 2" that require testing in the next 3 months'. The 'Created' date is '2009/03/06-10:09:30'. The 'System ID' is '10000002'. The 'Search Field' is '[BFP Assembly]Equipment Type Code'. The 'Operator' is 'Equals'. The 'Value' field is 'RP'. The 'Date Mod' field is empty. The 'Must Match All Above Criteria' radio button is selected.

Search Field	Operator	Value	Date Mod
[BFP Assembly]Equipment Type Code	Equals	RP	

Proceed to next search criteria

- Click the Add Search Item button

The screenshot shows the 'Saved Search Setup' dialog box. At the top, the 'System ID' is 10000002. The 'Saved Search Name' is 'Rps - Over 2" - Due For Testing in Next 3 Months'. The 'Results Table' is 'BFP Assembly'. The 'Description' is 'Get a list of RPs that are 2" that require testing in the next 3 months'. The 'Created' date is '2009/03/06-10:09:30'. Below this is a table with columns 'Search Field', 'Operator', 'Value', and 'Date Mod'. The first row contains '[BFP Assembly]Equipment Type Code', 'Equals', 'RP', and an empty 'Date Mod' cell. At the bottom, the 'Add Search Item' button is circled in black. Other buttons include 'Delete Search Item', 'Select an Field to Search', 'Duplicate this Saved Search', 'Run This Search Now', 'Cancel', and 'Save'. There are also radio buttons for 'Must Match All Above Criteria' (selected) and 'May Match Any of Above Criteria', and a checkbox for 'Exclude Inactive Records'.

Select the next Search Field in our example

- Select, Equipment Display Size

This screenshot is similar to the previous one, but with an arrow pointing from the 'Add Search Item' button in the previous image to the 'Add Search Item' button in this one. The search criteria table now has two rows: the first row is '[Equipment Size]Equipment Display Size', 'Equals', 'RP', and an empty 'Date Mod' cell; the second row is '[BFP Assembly]Equipment Type Code', 'Equals', 'RP', and an empty 'Date Mod' cell. The 'Add Search Item' button is no longer circled.

- Again, Select Equals for the operator selection
- Enter 2" for the Value

Saved Search Setup

System ID: 10000002

Saved Search Name: Rps - Over 2" - Due For Testing in Next 3 Months

Results Table: BFP Assembly

Description: Get a list of RPs that are 2" that require testing in the next 3 months

Created: Super Admin : 2009/03/06-10:09:30

Search Field	Operator	Value	Date Mod
[Equipment Size]Equipment Display Size	Equals	2"	
[BFP Assembly]Equipment Type Code	Equals	RP	

Buttons: Add Search Item, Delete Search Item, Select an Field to Search, Duplicate this Saved Search, Exclude Inactive Records, Run This Search Now, Must Match All Above Criteria, May Match Any of Above Criteria, Cancel, Save

Continue with adding each criteria in the same manner until your search setup looks like this.

Saved Search Setup

System ID: 10000003

Saved Search Name: Rps - Over 2" - Due For Testing Next 3 Months

Results Table: BFP Assembly

Description: Get a list of Rps that are 2" That require testing in the next 3 months

Created: SUPER ADMINISTRATOR : 2009/03/06-11:3

Modified: SUPER ADMINISTRATOR : 2009/03/06-11:39:11

Search Field	Operator	Value	Date Mod
[BFP Assembly]Next Test Due	Is Less Than or Equal to	*3M-3 Months*	
[BFP Assembly]Next Test Due	Is Greater Than or Equal to	*Current_Date*	
[Equipment Size]Equipment Display Size	Equals	2"	
[BFP Assembly]Equipment Type Code	Equals	RP	

Buttons: Add Search Item, Delete Search Item, Select an Field to Search, Duplicate this Saved Search, Exclude Inactive Records, Run This Search Now, Must Match All Above Criteria, May Match Any of Above Criteria, Cancel, Save

Select whether the search results must match "ALL" criteria, or whether it must just match "ANY" of the criteria

The Value Selection

Search Field	Operator	Value	Date Mod
[BFP Assembly]Next Test Due	Is Less Than or Equal to	3/30/2009	0
[BFP Assembly]Next Test Due	Is Greater Than or Equal to	"Current_Date"	
[Equipment Size]Equipment Display Size	Equals	2"	
[BFP Assembly]Equipment Type Code	Equals	RP	

If it is a "Date" Value, You can use a "Dynamic Date Code" as the value.

The listed Date Codes always function using the Current Date when performing the search.

For Future Dates, Select the first set of items.

For Dates before the Current Date, select the items with a "negative" sign in front of them.

Or you can type in a static date, e.g. 03/01/2009, You can then always change this date when you are ready to do the search, but it is much easier to use Dynamic Dates.

Also, You can use the "Date Mod" column to calculate Dynamic Dates:

e.g. "Current_Date" with the Date Mod of: -3 (negative 3) is 3 days ago.

You can also type in T-3, to get the same thing

T is Today

Y is Yesterday

Tom is Tomorrow

What To Do With Saved Search

There are several options available after creating your saved searches.

Run This Search Now

The screenshot shows the 'Saved Search Setup' window. At the top, the 'Saved Search Name' is 'Rps - Over 2" - Due For Testing Next 3 Months'. Below this, there are fields for 'Results Table' (BFP Assembly), 'Last Date Used', and 'Records'. A description field contains the text: 'Get a list of Rps that are 2" That require testing in the next 3 months'. The 'Created' and 'Modified' fields both show 'SUPER ADMINISTRATOR : 2009/03/06-11:3'. Below this is a table of search criteria:

Search Field	Operator	Value	Date Mod
[BFP Assembly]Next Test Due	Is Less Than or Equal to	*3M-3 Months*	
[BFP Assembly]Next Test Due	Is Greater Than or Equal to	*Current_Date*	
[Equipment Size]Equipment Display Size	Equals	2"	
[BFP Assembly]Equipment Type Code	Equals	RP	

At the bottom of the dialog, there are buttons for 'Add Search Item', 'Delete Search Item', 'Select an Field to Search', and 'Duplicate this Saved Search'. A 'Run This Search Now' button is circled in red. There are also checkboxes for 'Exclude Inactive Records', 'Must Match All Above Criteria', and 'May Match Any of Above Criteria', and 'Cancel' and 'Save' buttons.

You will be presented with a list matching your search parameters.

The screenshot shows a search results window titled 'BFP : Collier County: * BFP Assembly: 15 of 4360 Records : Multi-Line'. The table below contains the search results:

Facility Name	Addr (#)	Street	Next Test	Last Test	Type	Size
VnA Hospice At Home	9177	Lighthouse	03/20/2009	03/20/2008	RP	2"
Hospitality Group Inc The	429	Cali Glen	04/22/2009	04/27/2008	RP	2"
10-2190-0	9872	Heritage	05/15/2009	05/15/2008	RP	2"
Heartcare At Saint Joseph Hospital	2417	Halley	04/15/2009	04/15/2008	RP	2"
Vencor Hospital	5102	Village Ridge	03/16/2009	03/16/2008	RP	2"
VcA Wingate Animal Hospital	5441	John John	04/26/2009	04/26/2008	RP	2"
10-3320-0	4161	Smart	03/23/2009	03/23/2008	RP	2"
University Hills Animal Hospital	2043	Keats	03/13/2009	03/13/2008	RP	2"
10-5189-0	3544	Camden	03/30/2009	03/19/2008	RP	2"
10-5189-0	3544	Camden	03/30/2009	06/25/2008	RP	2"
10-5189-0	3544	Camden	04/30/2009	03/19/2008	RP	2"
10-5189-0	3544	Camden	04/30/2009	03/28/2008	RP	2"
10-5221-0	3010	Heritage Woods	04/30/2009	05/06/2008	RP	2"
Snoqualamish Doll Hospital	6748	Progressive	05/07/2009	05/07/2008	RP	2"
Davis Pavilion Washington Psychiatric H	1216	Tressler	03/18/2009	03/18/2008	RP	2"

At the bottom of the window, there are buttons for 'Set Selection', 'Recall Selection', 'Exclude Inactive BFP Assembly Records', 'New', 'ALL', 'B-2', and other navigation icons.

Duplicate This Search Setup

If there are several searches you need to create that are similar but not quite the same, Duplicating the saved search saves time by creating a duplicate of the existing search, saving the original, and allowing you to make changes

Search Field	Operator	Value	Date Mod
[BFP Assembly]Next Test Due	Is Less Than or Equal to	*3M-3 Months*	
[BFP Assembly]Next Test Due	Is Greater Than or Equal to	*Current_Date*	
[Equipment Size]Equipment Display Size	Equals	2"	
[BFP Assembly]Equipment Type Code	Equals	RP	

Buttons: Add Search Item, Delete Search Item, Select an Field to Search, Duplicate this Saved Search, Run This Search Now (circled), Cancel, Save.

Options: Exclude Inactive Records, Must Match All Above Criteria, May Match Any of Above Criteria.

Notice that all information in report is the same – except the name.

Make your changes and rename report and save

Search Field	Operator	Value	Date Mod
[BFP Assembly]Next Test Due	Is Less Than or Equal to	*3M-3 Months*	
[BFP Assembly]Next Test Due	Is Greater Than or Equal to	*Current_Date*	
[Equipment Size]Equipment Display Size	Equals	2"	
[BFP Assembly]Equipment Type Code	Equals	RP	

Buttons: Add Search Item, Delete Search Item, Select an Field to Search, Duplicate this Saved Search, Run This Search Now, Cancel, Save.

Options: Exclude Inactive Records, Must Match All Above Criteria, May Match Any of Above Criteria.

Saving Your Search

Saving your Saved Search Set, you can recall the search at any time and a new search result is performed without the need to re-define search parameters.

- Click Save

Saved Search Setup System ID: 10000003

Saved Search Name: Rps - Over 2" - Due For Testing Next 3 Months
Results Table: BFP Assembly
Description: Get a list of Rps that are 2" That require testing in the next 3 months
Created: SUPER ADMINISTRATOR : 2009/03/06-11:13 Modified: SUPER ADMINISTRATOR : 2009/03/06-11:39:11

Search Field	Operator	Value	Date Mod
[BFP Assembly]Next Test Due	Is Less Than or Equal to	*3M-3 Months*	
[BFP Assembly]Next Test Due	Is Greater Than or Equal to	*Current_Date*	
[Equipment Size]Equipment Display Size	Equals	2"	
[BFP Assembly]Equipment Type Code	Equals	RP	

Buttons: Add Search Item, Delete Search Item, Select an Field to Search, Duplicate this Saved Search, Run This Search Now, Cancel, Save

Options: Exclude Inactive Records, Must Match All Above Criteria, May Match Any of Above Criteria

Recalling Your Saved Search

From the file menu, click Saved Searches

BFP : Saved Search List

Show Searches for Currently Viewed List Only | Show Searches for All Result Tables

#	Search Name	Results Table	Description
1	Rps - Over 2" - Due For Testing Next 3 Months	BFP Assembly	Get a list of Rps that are 2" That require testing in
2	Test Last 60 Days	BFP Assembly	60 day test list

Options: Complex Search - UNION - Match Any Search, Complex Search - INTERSECTION - Must Match all Searches, Add to Existing Selection List, Filter with Existing Selection List, Create New Selection List

Buttons: Add Saved Search, Delete Saved Search, Modify Saved Search, Run Selected Search (s), Done

To generate your search,

- Highlight the search setup

Select whether the search results must match "ALL" criteria, or whether it must just match "ANY" of the criteria

- Click Run Selected Search

