

ADVANCED SEARCHING



What Does it Do?

Advanced searching allows users to design and run sophisticated searches on documents stored in the INVU system.

Running an Advanced Search

Advanced search can run as an isolated search query or in conjunction with search criteria specified elsewhere in the query screen. The choice is determined by selecting the appropriate radio button:

Add to Main Query:: Selecting this option will allow the Advanced Search to be combined with other search criteria e.g. Client Name.

- Example: Return all Correspondence IN for a specific Client Name within the last four months.

Only use the following in the Query:: Selecting this option will run the advance query as an isolated search

- Example: All Documents entered into the INVU System in the last two weeks.

The screenshot shows the 'INVU Query - Clients' window. It features a toolbar with various icons and a 'Show All Revisions' checkbox. Below the toolbar are tabs for 'Primary', 'Secondary', 'Quick Search', 'Text Search', 'Advanced', 'Notes', 'Search Results', 'Search History', and 'Options'. The 'Advanced' tab is active, showing two radio buttons: 'Add to main Query' (selected) and 'Only use the following in the Query'. A table for defining search criteria is visible, with one row containing: Client, BETWEEN, 14/09/2005, 29/09/2005. To the right of this table are buttons for 'Load', 'Save', 'Insert', 'Remove', and 'Monitor'. Below the table is a section for 'Select where value has not been set' with checkboxes for 'Document Type', 'Document Status', and 'Company'. At the bottom, there is a results table with columns: Document Id, Rev, Client, File Type, Comment, Year, Type, and Originator. A 'NUM' button is located at the bottom right of the window.

Field	Operator	Value	2nd Value	AND / OR
Client	BETWEEN	14/09/2005	29/09/2005	

Document Id	Rev	Client	File Type	Comment	Year	Type	Originator

To create an Advanced Search Click the **Insert** button, this will shift the focus to the first available row in the **Field** Column; from here you specify the index field you wish to query.

The next column allows the **Operator** to be set such as Greater than > or Between.

The **Value** and **2nd Value** columns can be anything that equates to the index field, e.g. 14/09/2005 to 29/09/2005.

Once you have filled in all of your criteria use the binoculars to run the search

Example Advanced Search

Go to your Query Screen::

Document Id	Rev	Client	File Type	Comment	Year	Type

In the **Primary** indexes fill in the Client name and the Document type you require.

In the Advance tab, select **Add to Main Query**. Fill in the columns as follows::

Field: Entry Date

Operator: Between

Value: 02/02/06

2nd Value: 02/03/06