

Search for an Object

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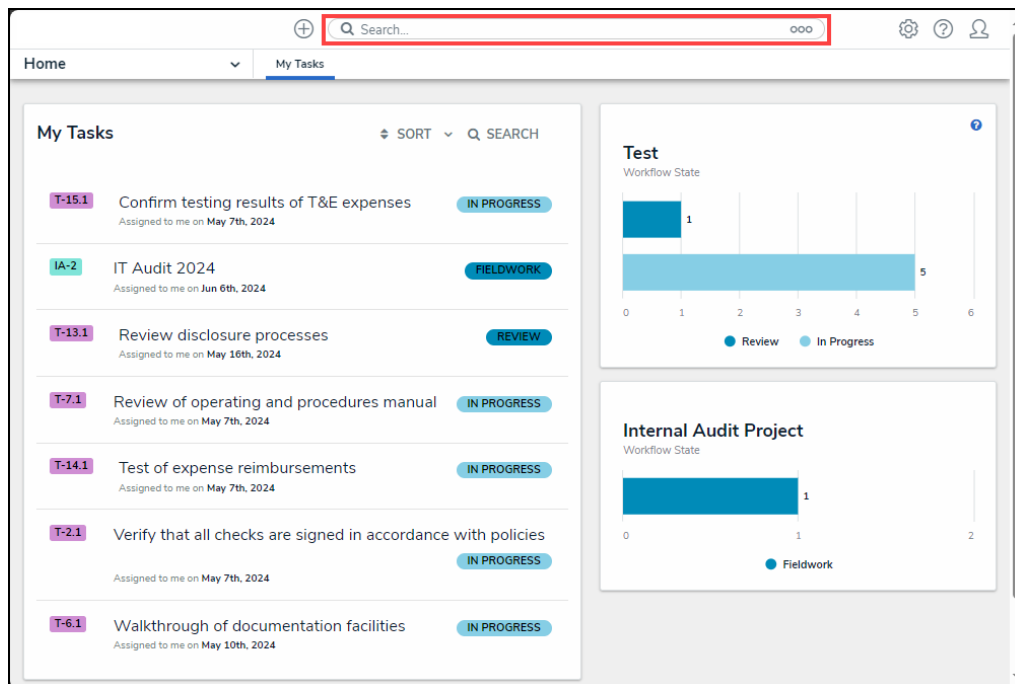
Overview

The following explains how to search for objects using keywords. When using the search function, note that an object refers to any record created in your organization, whereas an object type is the category of data collected.

The **Search** field appears at the top of every screen within the application. For this illustration, we are going to start from the **Home** screen.

Navigation

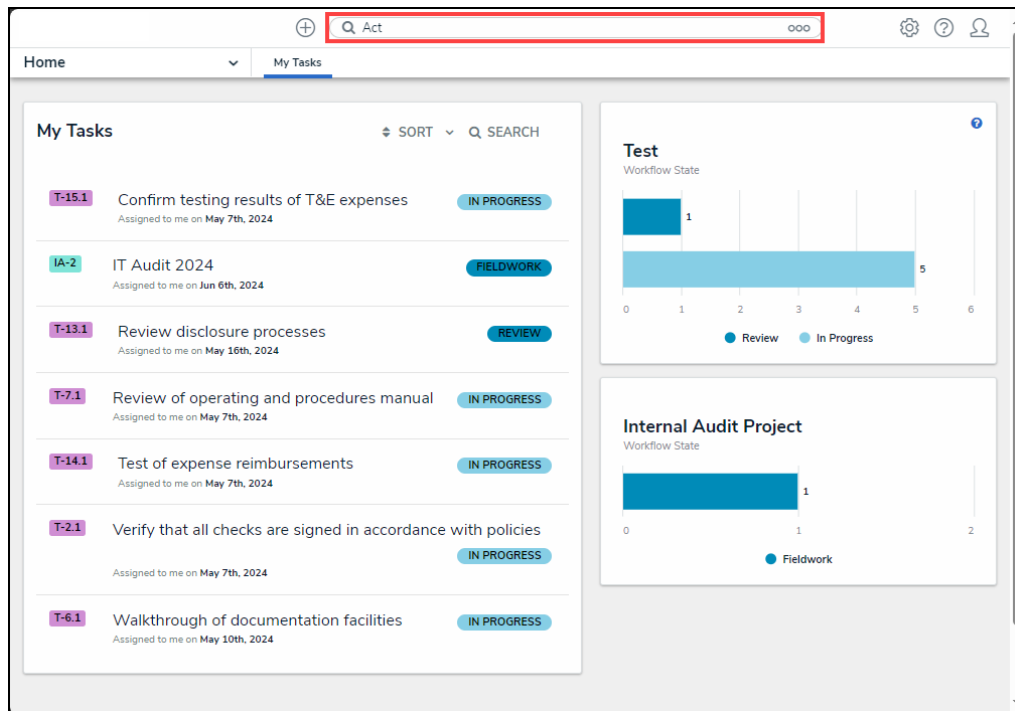
- From the **Home** screen, select the **Search** field in the **Navigation Bar** section.



Search Field

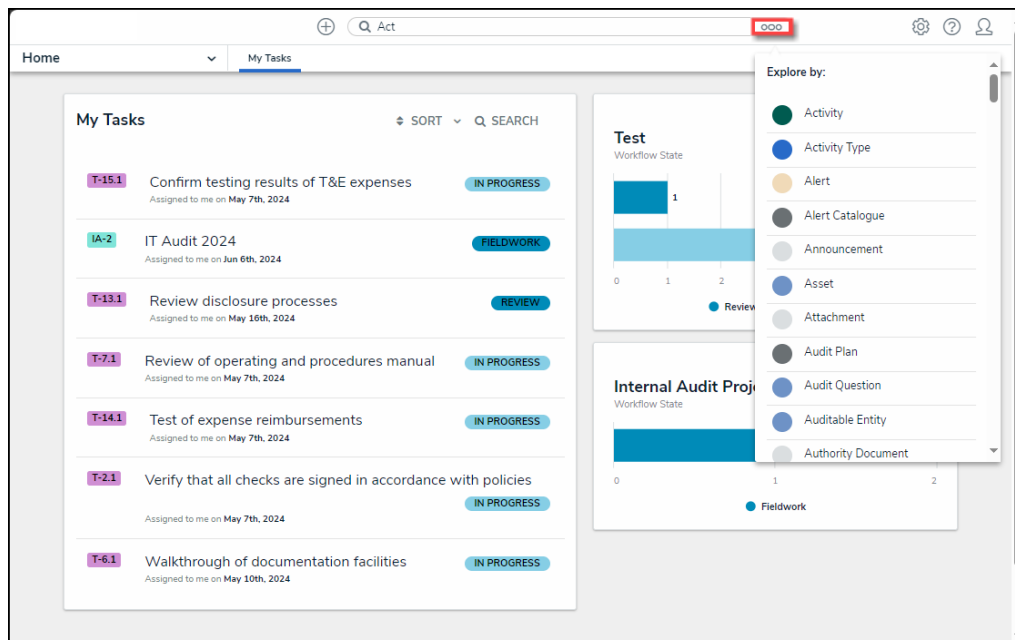
Searching for an Object

1. Enter an **Object Name** in the **Search** field.



Search Field

2. **(Optional)** Click the **Options Menu** icon to select an **Object Type** from the dropdown menu to filter the search results by object type.



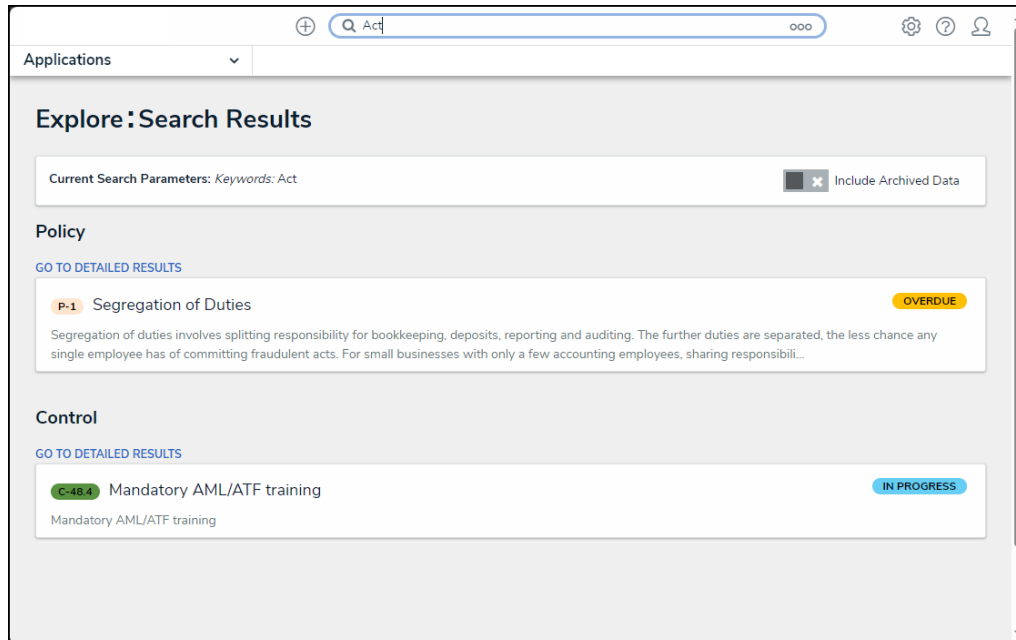
Options Menu Dropdown



Note:

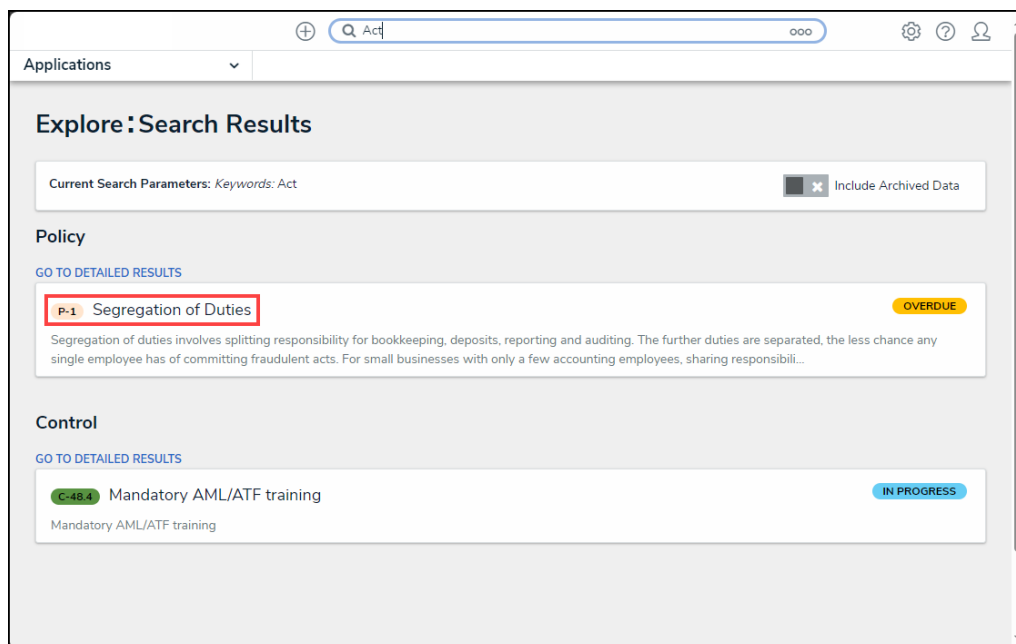
If you filter the search results by object type, the system will automatically return the search results once you select an object type from the **Options Menu** dropdown menu

3. Press the **Enter** key on the connected keyboard.
4. The search results will return based on the object name entered in the **Search** field. Search results are sorted by object name.



Search Results Screen

5. **(Optional)** Click an **Object Name** to view further object details. The screen that appears will depend on the user's user group permissions.



Object Name Link

Numeric Search Rules

- Entering a number's full numeric term will return the exact result. For example, searching for "000000123" will return "000000123".
 - If a number is separated by spaces, hyphens, parentheses, or other non-numeric or non-alphabetical characters, searching for a separated portion of that number will return applicable search results. For example, searching for "234" or "8910" will return "1 (234) 567-8910". Likewise, searching for "123" will return "123 456 789".
 - Searching for a portion of a number that is **not** separated by non-numeric or non-alphabetical characters will not return any search results. For example, searching for "000000" will not return any search results, but searching for "000000123" will return "000000123".
 - If a phrase contains a mix of numbers and words that are separated by spaces, hyphens, parentheses, or any other non-numeric or non-alphabetical characters, searching for a portion of that phrase will return applicable search results. For example, searching for "123" will return "Number 123."
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Text Search Rules

- Text search terms must be in their complete forms to return results. For example, searching for "accident" will return "accident", but searching for "Acc" will not return any results.
- If a word or phrase is separated by spaces, hyphens, parentheses, or other non-alphabetical or numeric characters, searching for a separated portion of that phrase will return applicable search results. For example, searching for "John" will return "John Doe." Likewise, searching for "double" will return "double-check".
- If a phrase contains a mix of words and numbers that are separated by spaces, hyphens, parentheses, or any other non-alphabetical or non-numeric characters, searching for a portion of that phrase will return applicable search results. For example, searching for "Doe" will return "John Doe (555) 555-5555."
- Searching for a root word will return that root word and its related forms. For example, searching for "accident" will return "accidental," "accidentally," "accidents," etc.
- Search terms are not case-sensitive.
- Stop words (words that are considered unimportant by the search tool) are automatically removed from the search terms (e.g., a, by, for, in, etc.)
- Searching for words in possessive form will return both the possessive and non-possessive form of the word. For example, searching for "John's" will return both "John's" and "John."
- If searching for words with special characters or accents, you must include the special character or accent in the search. For example, searching for "Joël" will return results, while

searching for “Joel” will return no results.