

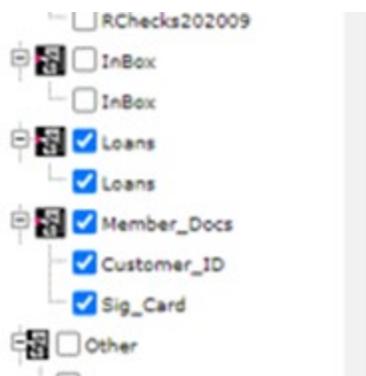


Tech Tip #61 Creating a Quick Search in idocVAULT

*****These settings and features may not be available for all clients. If you do not see them, please contact your solution provider.*****

Quick searches allow you to quickly locate files that are in different tables.

To create a quick search, first select the tables you want to include in your search:



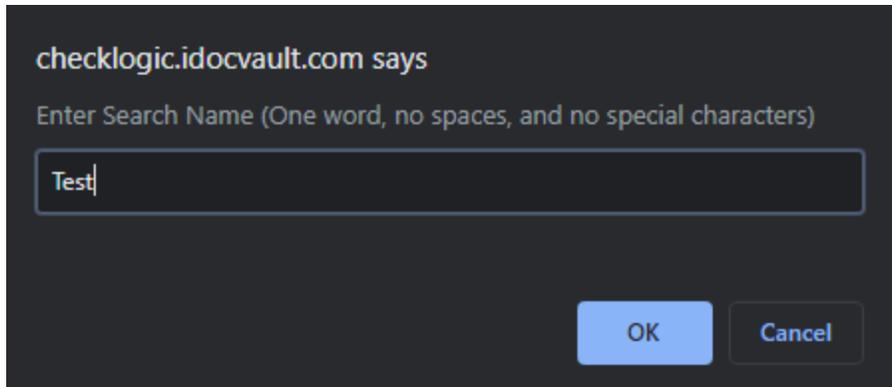
Next, click the **Search** tab. Note that the search options at the top of the screen will be limited to information that is shared among all tables. For example, if all tables do not have an "Account Number" field, there will not be the option to search by account number in the quick search. To create a quick search, check the **Save Search** box. You will not want to enter any date in the boxes, as this is a search you can use again in the future.

The screenshot shows a search interface with two tabs: 'TABLES' and 'SEARCH'. Below the tabs are eight input fields: 'Account', 'Form', 'First Name', 'Last Name', 'SSN', 'Start Created On', 'End Created On', and 'Created By'. The 'Start Created On' and 'End Created On' fields have small calendar icons to their right. At the bottom, there is a checkbox labeled 'Save Search' which is currently unchecked. Below the checkbox is a button labeled 'SEARCH' with a right-pointing arrow. A mouse cursor is hovering over the 'Save Search' checkbox.

After checking the Save Search box, click the **Search** button.

This screenshot is identical to the one above, but the 'Save Search' checkbox is now checked. A mouse cursor is hovering over the 'SEARCH' button.

A prompt will appear asking you to name the quick search. Type in a name for your quick search and click **OK**.



Your newly created Quick Search will now show at the top of your screen as a tab located beneath the blue tabs:

