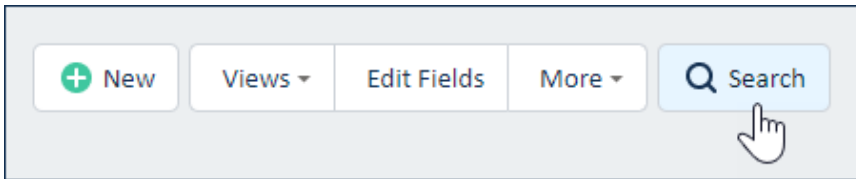


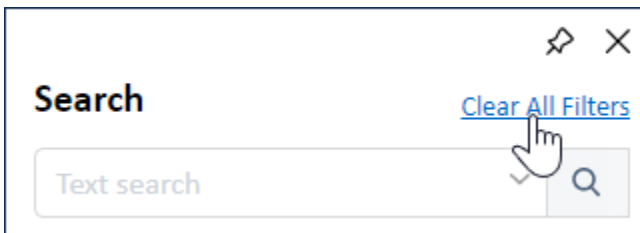
Quick Search

Access Quick Search from the table view by clicking Search in the action bar. Quick Search makes it fast and easy to run simple searches on records in a table.



Search button in action bar

After you run your search and find the records you need to work with, you can hide the search pane by clicking Search again or clicking the X in the top right corner. Hiding the pane doesn't change the results shown in the table view. If you prefer to keep the pane open all the time, click the pin icon to keep it in place. To remove your search criteria and show all records in the table, click Clear All Filters in the search pane.



Clear All Filters

To keep the Quick Search pane open until you dismiss it, click the pin icon. This keeps the Quick Search pane open while you navigate across tables or open and close records. You can click the pin icon again to unpin the pane, or click X to unpin and close it.

Running a Quick Search

To run a Quick Search:

1. Click Search in the action bar to open the Quick Search pane.
2. Enter search criteria in any or all of the fields that appear. To search the whole record and all its attachments, use the Text search field at the top of the pane.
 - a. Click the caret arrow in the Text search field to access additional options:
 - **String:** Runs the search on strings instead of whole words. For example, if you searched "med," you would find records that include terms such as medicine, medical, and medic. String searches are more resource-intensive, so results might take longer to load.
 - **Context:** Shows the context of the result beneath each found record. This can be helpful when searching common words.
 - **Synonym:** Runs the search on both the search term and its **synonyms**. To select dictionaries for synonym search to use, click the gear icon on the same line.

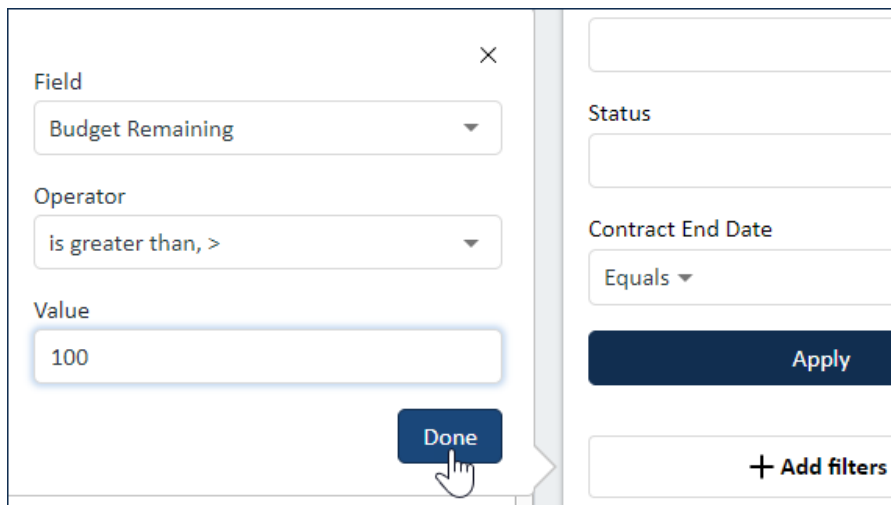
- **Active Only:** Filters the search results to show active records only. To define or redefine the criteria for an active record, click the gear icon on the same line. To use Active Only, you must select the checkbox and click Apply, but you don't need to enter any search terms in the Text search field.
- The settings gear opens several advanced options, including the synonym dictionary and Active Only settings mentioned above:
 - **Fast Search** and **Search for Strings:** Provides the ability to search on exact words, different grammar forms, phrases, or word fragments. As mentioned above, string searches look for the specified letters anywhere they appear together, not just as whole words, and therefore can be more resource-intensive.
 - **Best Match** and **Most Recent:** Defines how the search results are sorted.
 - **Treat numbers as words:** When you enter only numbers in the Text search field, this controls whether those numbers are treated as ID field searches or text.
 - **Display search results in a new window:** Opens search results in a new window.
 - **Active Records:** Uses a saved search to define which records are considered active.

The screenshot shows a search interface with the title "Search" in bold. To the right is a blue link "Clear All Filters". Below the title is a text input field labeled "Text search" with a magnifying glass icon to its right. A hand cursor is pointing at the input field. Below the input field are four checkboxes: "String", "Context", "Synonym", and "Active Only". The "Active Only" checkbox is checked. To the right of the "Active Only" checkbox is a gear icon.

Expand the caret to access more options

- b. Other fields have inputs that reflect the type of data they contain. For example, fields that store dates offer a calendar icon and a drop-down to select whether you want to search before, after, or on the date you select.
3. To search using fields that don't appear by default, click Add filters at the bottom of the pane.
 - a. In the Field drop-down, select the record field you want to search on.
 - b. In the Operator drop-down, select an operator to apply a method for limiting the search, such as "contains," "equals," or "is greater than." The operators available to select from the drop-down change with the field you select. For a full account of available operators, see [Creating Saved Searches](#).

c. In the Value field, enter the value you want to look for.



Adding a search filter

d. Click Done to add and apply the filter.

4. Click Apply to search using your terms, or press Enter on your keyboard after entering the last search term.

✓ To quickly find records by ID, open Quick Search and enter an ID number, list of numbers, or range of numbers in the Text search box. You don't need to use the ID field. For example, 10-15,22,23 will find records 10, 11, 12, 13, 14, 15, 22, and 23. You can search for numbers elsewhere by enclosing the number in quotation marks, searching the number and a word, or selecting a field from the drop-down menu. You can search for numbers as text instead by clicking More Options and selecting the Treat numbers as words checkbox.

You can also search using parentheses and operators. For example, searching Status=Active would return all Active records, instead of records that contain the words status and active. Field labels are case sensitive when searching in this manner. For more information on syntax and operators you can use in Quick Search, see [EWSearchTableWithQuery](#), an API function that uses the same format.

Quick Search Fields

The fields that appear in the Quick Search pane are configured in [Configuring Views](#). Depending on your permissions, you can configure your personal view to set your desired Quick Search fields, and administrators can set Quick Search fields in views available to other users.

Quick Search Setup is a key usability recommendation before going live with the system.