# Search Tips & Tricks

### Left Nav. vs. Queries – Which to Use?

I want to guickly go in and out of items = Left Nav. I want to export my results = Query

### **Search Field Tips**

onePLM search fields require exact entries. Follow these tips and tricks to search with ease

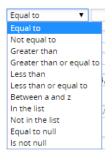
onePLM only has (2) fiscal seasons ("spring" and "fall") and the season / year must be typed as exampled: SP17 **Fiscal Season** ("spring 2017") or FA17 ("fall 2017")

Fiscal Season	Like	▼ FA17	
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Dept

- Search Commands Different search fields may have different search option "commands", such as "like", "in the list", "equal to" and etc. Utilize the different drop down commands to help aid in your searches
- Searching for "More Than One" For example, if you wish to search for more than one department number, select "In the list" in the drop down, and type each three digit department number with a comma in between with no spaces

In the list



- Est INDC By using the drop down and selecting "Between A and Z", and selecting the first date of a month, adding a comma, and typing in the last day of the month (no spaces), you can pull search results by month
- **Created Date** By using the drop down and selecting "Between A and Z", then typing in a date range in this format: 01/01/2018 oo:oo:oo, o2/o1/2018 oo:oo:oo you can pull search results of items created between a specific time frame

▼ 044,144,244

#### **Operational Searches**

An Operational Search lists all the search fields on the screen, with the option to choose to be more specific

#### Example of Using the Operational Search

"I want to search for items across three departments"

Field 0	Oper: Ope	eration	Value	[	Operational Search		
Dept 🔻		•	044,144,244	=	Field	Operation	Value
Style No Request No Description Development Stage Fiscal Season Commodity	- Not Like Not Not	ot like t <mark>he list</mark> ot in the list			Dept 🔻	In the list 🔻	044,144,244
Brand Division Dept Development Season Customer	End Equ	arts with ids with jual to null not null					

#### Save Search

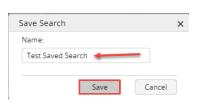
Reduce daily search clicks by saving common searches within your gueries (not available for left nav searching).

1. Execute your search in any query, then select "Save Search" under the Search List header above your search results.

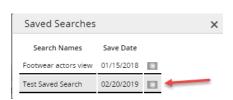




- Name the search accordingly in the "Save Search" window.
- 3. Click "Save." View is now available when you click "Saved Searches".
  - a. Your searches are listed in the pop-up window and can be access by clicking on the title.
  - b. You can also delete the search by clicking on the "X" next to the search's save date.







## **My View**

#### Freeze Columns

Freezing a column allows the column to "lock", so that the user can scroll to view information, keeping the columns visible.

- 1. **Click** the down arrow next to the column header.
- 2. A box will appear. Select "freeze".

#### **Unfreeze Columns**

Free locked cells so that they move with the scroll feature.

- 1. **Click** the menu icon of the column.
- 2. Click "Unfreeze".

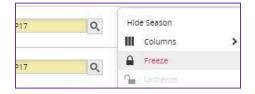
#### Hide/Unhide Columns

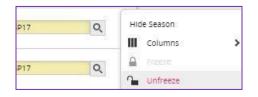
You can "hide" columns with information you don't need to see, and "unhide" them when you want to reverse the feature.

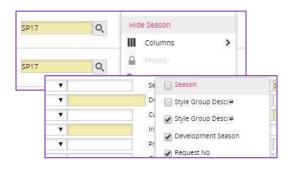
- 1. **Click** the menu icon of the column.
- 2. Click "Hide".
- To un-hide, Select down arrow and hover over "columns".
- 4. Check the hidden column you would like to appear in your view.

#### **Reorder Columns**

1. **Drag** column headers one at a time by "grabbing" and "dropping" to new positions. You can re-order the columns to show them in the sequence you prefer.



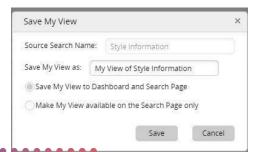






#### Save My View

- 4. Set up query columns based on preferred view.
  - This is the preferred method, as the view will also be saved to the Dashboard under the original query and marked with a pink star.





- b. Generally, use this option for views used often to avoid filling up the Dashboard.
- c. For queries that you search often, you can save the view to your dashboard for quick and easy access.
- 5. Click "Save My View".
- 6. Name the view below "Save My View As".
- 7. Select "Make My View Available On Query Page Only".
- 8. **Click** "Save." View is now available in the drop-down listing next to "Save My View".
  - a. "Save My View" will not be visible for searches that My Views are not available.

Sourcing Workflow

Mass Manage Tech Spec Overview

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#### **Toggling between Views**

If you have multiple views saved in a query, you can easily toggle between them.

- 1. Open the query you want to view.
- 2. Using the drop-down listing next to "Save My View", select the view you'd like to jump to.
- 3. **Select** the saved view. Query results displayed are based on previously saved preferences.

Note: If you have saved on the dashboard, simply click the pink starred query.

#### **Delete View**

- 1. Select the saved view from the dashboard.
- 2. **Click** "Delete a View" from the links.
- 3. Select the views to delete, and click "Delete".
- 4. **Click** "OK" to the warning message that appears.

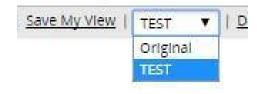
#### Sort Columns

Columns can be sorted in ascending and descending order.

1. Click the column heading you want to sort the results. First, click sorts item in ascending order (A-Z) and second, click sorts items in descending order (Z-A).



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Delete Views	
Select View to delete:	
Test Mass Manage View	