

Lab 7 -Using Search Tools

Chapter Objective

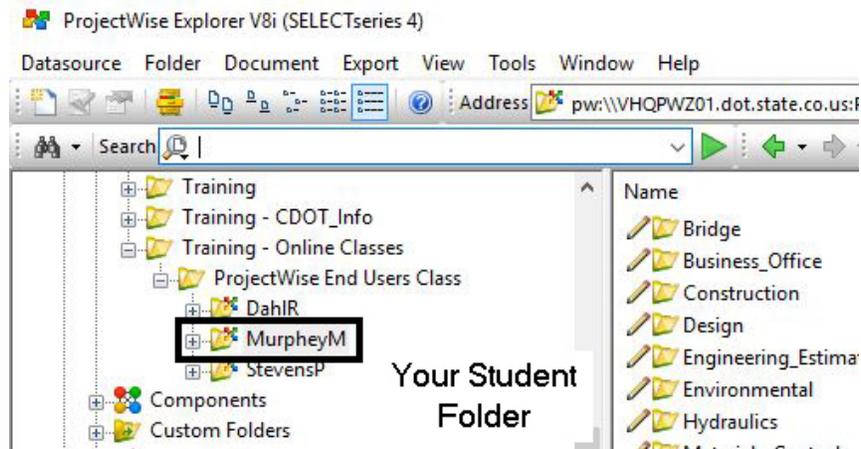
- Using the Quick Search method
- Searching for CDOT Attributes
- Saving Search Forms

Lab 7.1 - Quick Search Method

The Quick Search Method is easy to access and input search criteria. The search results will be shown in the Document List area (upper right panel).

1. Navigate to the top of your student folder and click on the folder.

Note: Be sure to click on the folder.

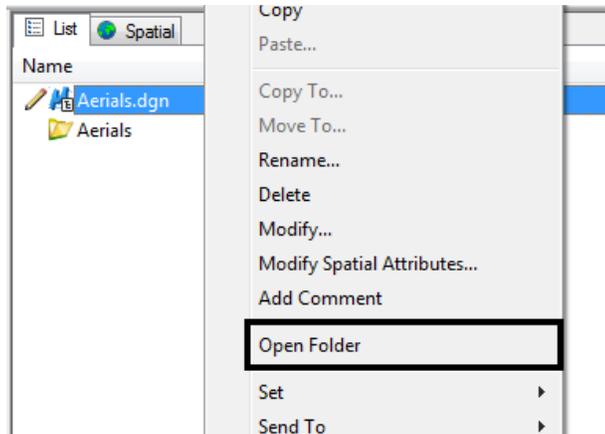


2. Enter ***aerials*** into the search toolbar and select the Enter key.



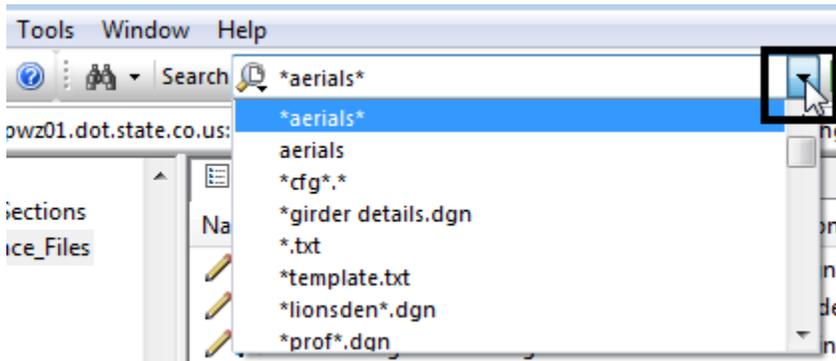
A document and a folder are found in the student folders.

3. To find the folder location of the document, **right-click** on the document and select **Open Folder**.



The folder will be opened and the document will show in the Document List area.

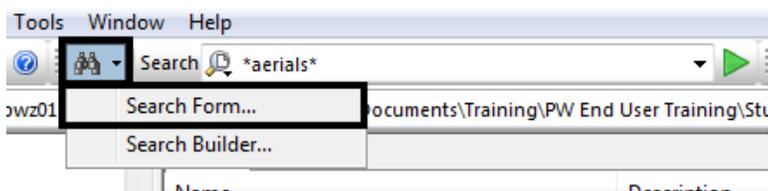
4. **Select** the **down arrow** on the right side of the search toolbar. A listing of previous searches is available to be used again.



Lab 7.2 - Searching for CDOT Attributes

The Search by Form method can be used to search by properties and attributes for any documents.

1. **Select** on the **down arrow** next to the binoculars icon on the search toolbar. This will open the **Search by Form** dialog box.



2. **Select the General tab.** A search can be completed on any of the available properties.
3. In the **Folder** area of the **General** tab, **select the Look in Change** button. Here is where the search folder should be entered.

The screenshot shows a dialog box titled "Search by Form - CDOT_Active_Projects" with several tabs: "General", "Attributes", "More Attributes", "File Properties", "Full Text", and "Spatial". The "General" tab is selected. The dialog is divided into sections for "Document", "File", and "Folder".

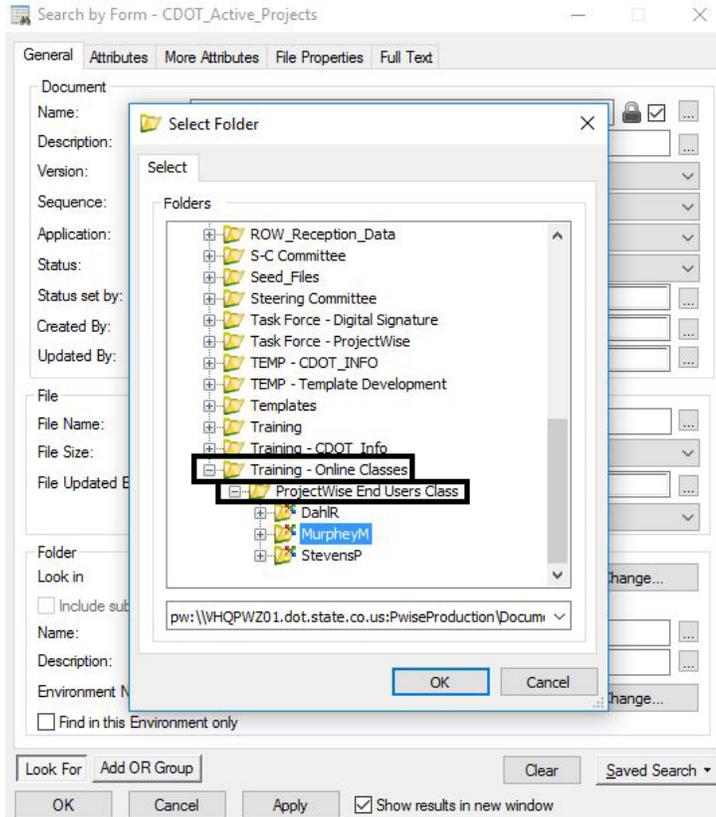
The "Document" section includes fields for Name, Description, Version, Sequence, Application, Status, Status set by, Created By, and Updated By. It also has dropdown menus for Workflow, State, Department, and Out to, and text boxes for On:.

The "File" section includes fields for File Name, File Size, File Updated By, Storage, and Conflicts, with dropdown menus for Storage and Conflicts, and text boxes for On:.

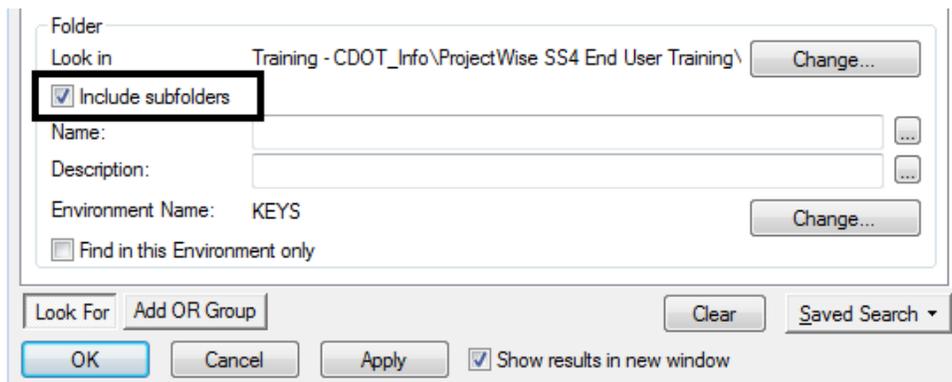
The "Folder" section is highlighted with a black box. It contains a "Look in" field with a "Change..." button next to it. Below this is an unchecked checkbox for "Include subfolders", fields for "Name" and "Description", an "Environment Name" field with the value "KEYS" and a "Change..." button, and an unchecked checkbox for "Find in this Environment only".

At the bottom of the dialog, there are buttons for "Look For", "Add OR Group", "Clear", and "Saved Search". At the very bottom are "OK", "Cancel", "Apply", and a checked checkbox for "Show results in new window".

- In the **Select Folder** dialog box, navigate to your student folder and select **OK**.
ROOT\Training – Online Classes\ProjectWise End Users Class\YourStudentFolder.

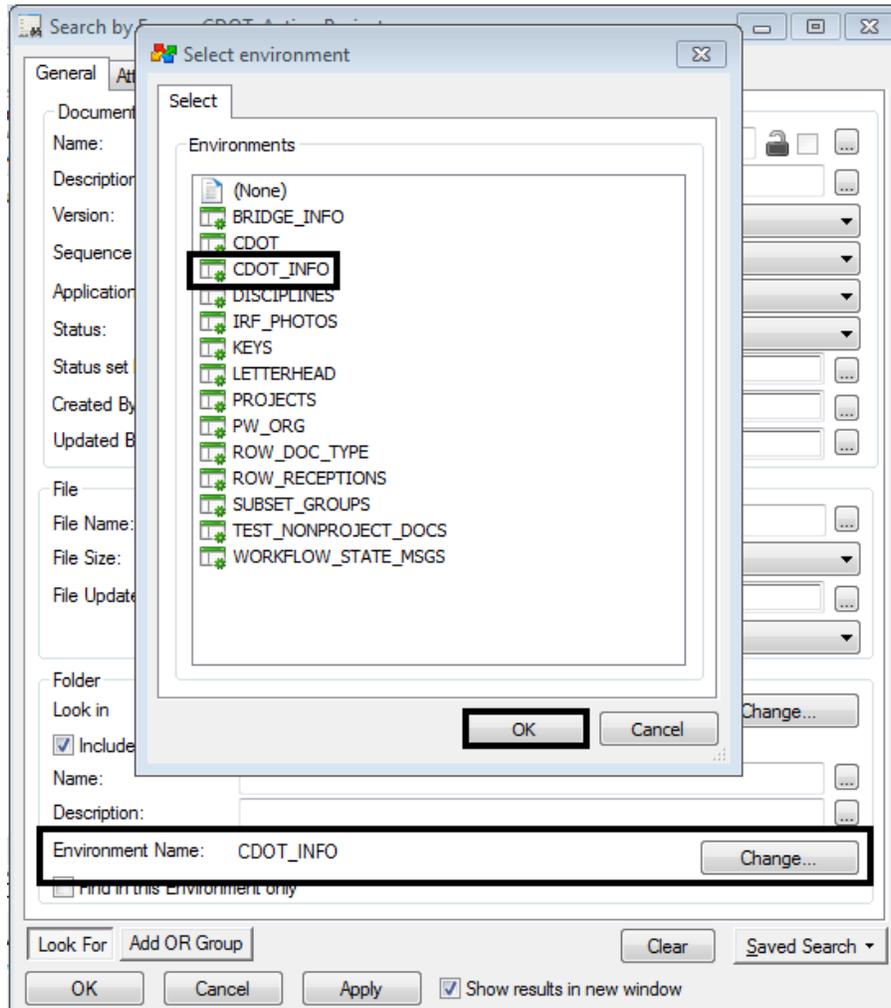


- Also in the **Folder** area, toggle **ON Include subfolders**. This allows the search to look beyond just the folder that was selected.



- Select the **Change...** button for the **Environment Name**:

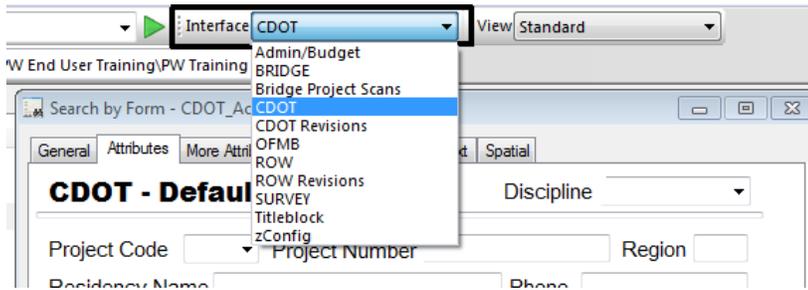
7. In the **Select environment** dialog box, select **CDOT_INFO** for the environment.



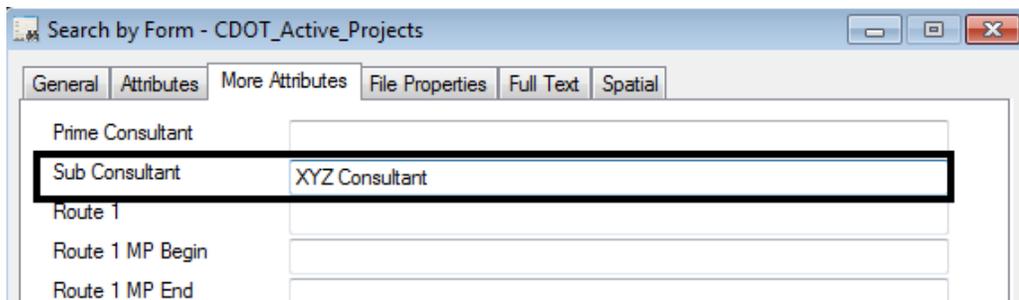
8. Select **OK** to continue.
9. **Select** the **Attributes** tab. Any of these fields could be used in a search also.

NOTE: Each Specialty Group has a custom interface to view ProjectWise Attributes. The default interface is **CDOT**.

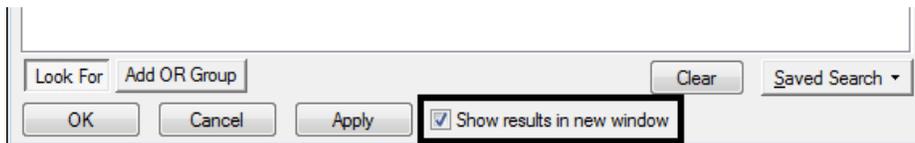
10. From the **ProjectWise Explorer toolbar**, select the down arrow on the **Interface** button to see other interfaces.



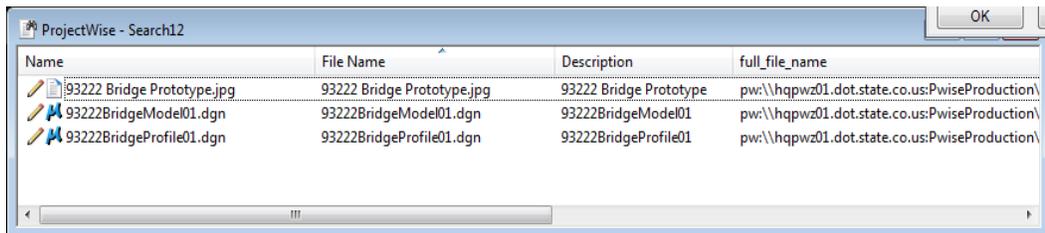
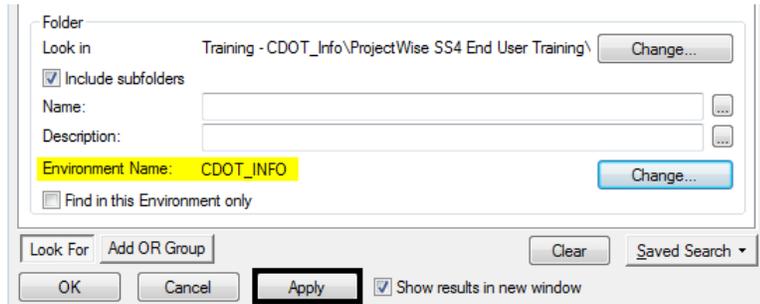
11. Go through the list to see how the Attribute Interface changes. Attributes pertaining to the Specialty Group are shown and can be used for searching.
12. Return to the **CDOT** interface.
13. **Select the More Attributes** tab, these are additional attributes created for CDOT Projects.
14. **Key-in XYZ Consultant** in the **Sub Consultant** field.



15. Toggle **ON Show results in new window**. The default is to show the search results in the Document List area. This setting will bring the results up in a separate window.



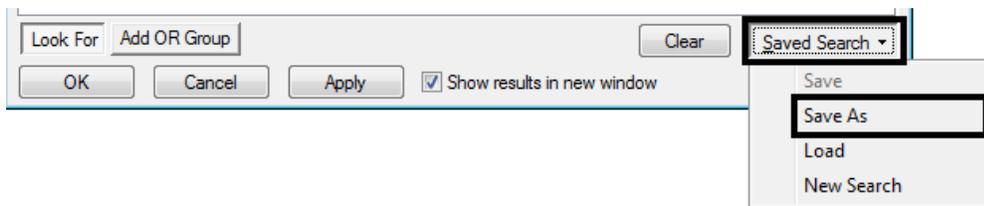
16. **Select Apply** to run the search. The search results will be shown in the new window.



Lab 7.3 - Saving a Search

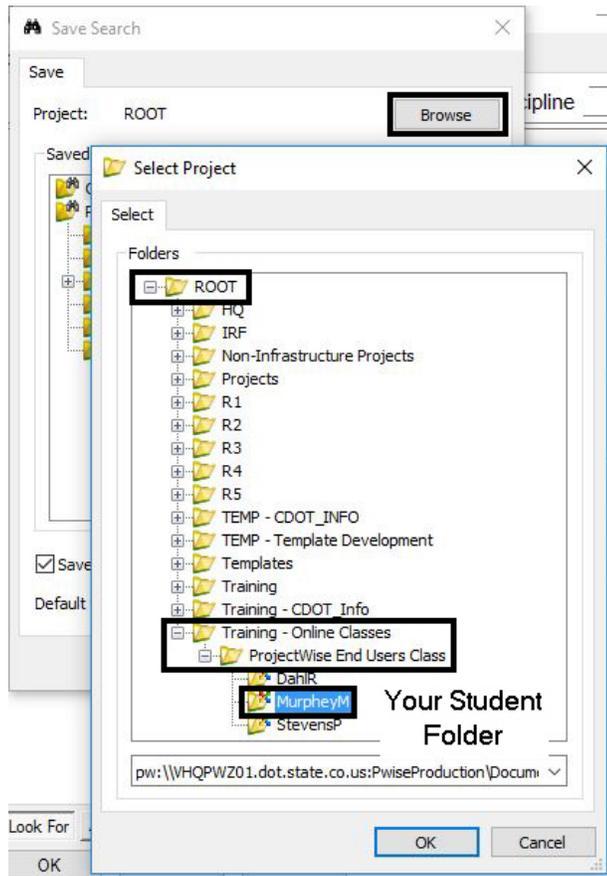
Search criteria can be saved for use at a later time.

17. In the lower right corner of the **Search by Form** dialog box, select the **Saved Search** button.
18. **Select Save As**. This will open the Save Search dialog box where the search can be named and saved.



19. **Select the Browse** button to select the project folder to be search.

20. Navigate to your student folder and select **OK**.



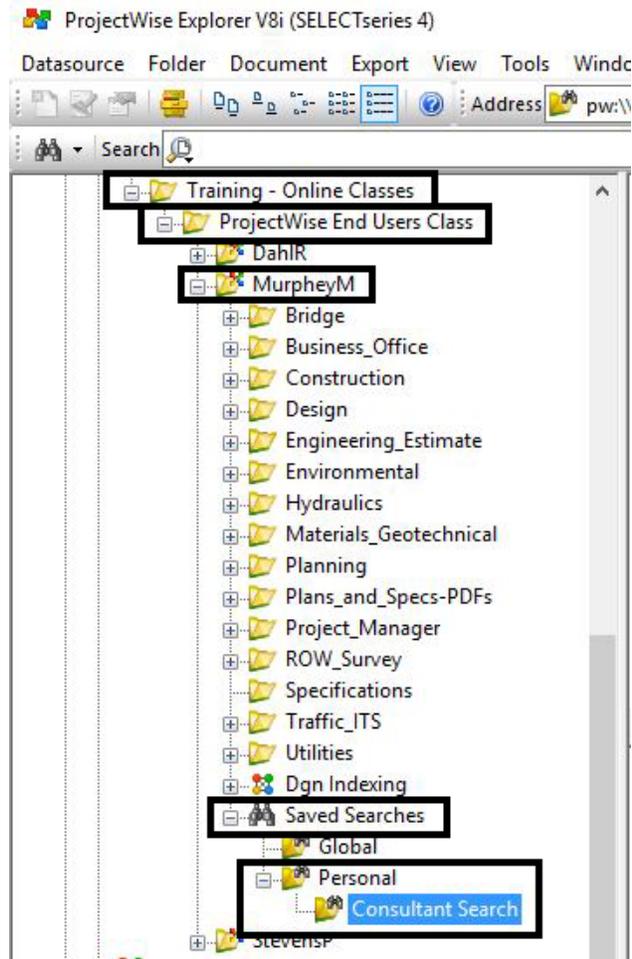
21. Under the **Save Searches** area, select **Personal**.

22. **Toggle On** the **Saved Search Name** and enter **Consultant Search**.

23. **Select Save** to close the **Search by Form** dialog box.

24. To use the saved search, navigate to your student folder in the Datasource area (left side of ProjectWise Explorer).

25. Expand the **Saved Searches > Personal** folder.



26. **Select the Consultant Search.** The search will display the documents found in the Document List area on the right.