Searches & Queries

Searches vs. Queries

- Difference between a Query (QBE) and a Search
- Advantages & Disadvantage cheat sheet

	Advantages	Disadvantages
QBE	Simplest Can be done on people, companies, job orders, searches, activities & Daily Planner	List is temporary Limit on entries that you can use (i.e. no key words, phone numbers & UDF) Cannot remove items from list without deleting data
Search	Search list is retained Window driven selection criteria Can add and remove from search list Priority and weighting options Search list populated by search criteria	Only works on people, companies & job orders
Saved List	Saved List is retained Can add/remove from saved list	Only works on people and companies List must be populated manually

Queries

- Running a QBE from the Persons table
- Running a QBE from a Persons Form
- Memorized Queries

Searches

- Create a new search using the **New Search** icon
- **Description:** Every search that is executed is saved, regardless if it has a description or not
- **Search Owner**: will link the search to a Person, Company or Job Order Record
  - ✓ NOT the type of record you want to search on
- Search For & select Persons to search for People

SEARCH #1:
Key Words – ORACLE, JAVA, SOFTWARE, C++
Persons Status – Active

SEARCH #2: Required & Desired

- Run a **Count**
- Change JAVA and C++ to Des

SEARCH #3 – Zip Distance
- 25 miles from Zip Code 44115
- 25/44115

SEARCH #4 – Use of OR
Persons Status – Active
Home State = OH
Home State = MI
Home State = PA
Persons Category = Perm Applicant

SEARCH #5 – Date Ranges
Records that have not been updated since 2005
Date – Rec Update >= 12/31/2005

SEARCH #6
Records created in the year 2006
Date – Rec Create >= 01/01/2006
Date – Rec Create <= 12/31/2006

Working with Search Results
- Can sort lists by Column Headings
- Power - click navigation to easily scroll through results
- Persons WS resume, Documents & Activity log accessed by right clicking
- Review adjusting column settings
- Deleting records from result list

Saved Lists

Reasons for creating saved lists:
1. Holiday Card list
2. Newsletter List
3. Hot Candidate list

- Create a new Saved List by going to Lists → Saved Lists
- Adding records to a Saved list
- Creating Saved lists on the fly*
  *Only available in WS 7.0 or higher!