RM010 – SEARCHING FOR FILES

1. On the toolbar at the top of the FileMaster screen, click ‘FileMaster’ and select ‘File Enquiry’ from the drop-down menu.

Or you can type Ctrl + F (keyboard commands are indicated on the drop-down menu).



1. The ‘Search’ box will appear. Select a search option by clicking on the yellow box on the top left hand side. A drop down menu will appear. Select using the mouse.

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|  | The common search options are:* By File Number – if you know the alphanumeric file number eg SVS/0031
* By Text – searches for text (words and numbers) in the FileMaster file. This is useful if you are looking for records on a particular subject.
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## Searching By File Number

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| Searching by File Number is useful (and quick) if you know the alphanumeric number of the file eg SVS/0031.Type the File Number in the white box and click ‘Search’ on the bottom right hand side.This will take you to the FileMaster file. |  |
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## Searching By Text

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| When you select the option, ‘By Text’, the ‘Search’ box will appear as shown. |
|  | Select the fields you wish to search from the ‘Search In’ box on the right hand side. You can select one, two or all categories by clicking on the mouse and dragging until each field is hilighted.* File Title
* Comments
* Document Text
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|  | Type the text you wish to search on in the ‘Text Entry’ box (large white box in the middle). FileMaster will search on each individual word and also parts of words.Eg Searching for John will also bring up files with Johnston |

***The Selection Screen***

Searching ‘by text’ or ‘by a range of file numbers’ will take you to the Selection screen.

This is a list of the files that match the search criteria you entered. Below is an example of a search by text for ‘records’.

The files can be listed either by File Number or by File Title (order shown by text in bold). Click on your preference.

* To hilight a file, click the mouse once.
* To select a file (go to the file screen) double-click the mouse.



Action buttons on the right hand side:

Return to Find Returns to the file enquiry screen to do another search

Remove Selection Removes hilighted records from the list

Print Selection Prints list (you can select the details you want included eg location, comments, documents etc)

***Example of a FileMaster File***

A FileMaster file appears as shown below. It shows the detail about the file.



Action buttons on the right hand side:

Find Returns to the File Enquiry screen to do another search

<< Go to the file number or file part preceeding the one you are looking at eg SVS/0085\3

>> Go to the next file number or file part eg SVS/0086\2

Selection Return to the Selection screen (list of files)

Edit This will only appear black for files that you have access to edit. Otherwise it will be grey as shown above.

History Displays the movement of the file to different locations (if applicable)

Document Links to the list of key documents in the file. The word will appear in blue and underlined if there are documents listed in the file. Otherwise, the word will appear black.