Overview
This quick reference card (QRC) for MasterControl summarizes how to use the search button appearing on the toolbar of screens that contain lists. Information covers using the three tabs on the Search window and saving your search criteria for you to use at a later time.

Using the Search Button
As a document management system, MasterControl can contain quite a large volume of InfoCards, documents, tasks, training classes, and other elements. Trying to manually locate a particular element from a list can be a very time-consuming task.

Instead, MasterControl provides a built-in search tool on most screens containing lists to make it easier to find one or more items in less time.

Although the particular fields that appear vary with each screen, the way you operate the search’s tabs are similar.

Note: The way you use the text box in the Search field at the top right corner of all pages (a Portal Search) operates differently from the way you use the Search button.

Opening the Search Screen
To access the Search button, you must be in a screen that has a list, such as the Task Tracking screen.

Note: For clarity, we will refer in the following sections to the contents of the list as you see it when you first view the screen as the original list.

When you click the Search button on the grey toolbar, the Search window appears. The exact search criteria fields on this window vary with the type of element you are searching, but the window always contains three tabs providing three kinds of searches: Simple, Basic, and Advanced.

The lower left corner provides fields you can use to record your search criteria in a customized Saved search (for details, see “Saving Your Search Criteria” on the next page).

The lower right corner provides a Clear button to reset all search criteria fields on a tab and a Submit Search button to send your search criteria to MasterControl for processing.

Conducting a Simple Search
The Simple tab provides the Search for text box for you to enter all or part of a number, word, or phrase (maximum of 50 characters). MasterControl compares whatever you enter against all searchable fields for the element. If you want, you can use an asterisk as a wildcard.

As you decide what to enter, keep in mind the Simple search conducts a literal left-to-right search for an item on the screen’s original list. It will not find embedded letters or numbers or items not on the original list. For example, if you enter 37, the search finds elements such as 3710, 3726, or 372Q, but will not find elements such as 1137, 037, or A37.

Note: If you enter a phrase (more than one word), enter double quotes around the entire phrase. This tells MasterControl to search left-to-right using all the words. For example, if you enter Duke Medical without quotes, then MasterControl finds all elements that start with Duke in their name, and then finds all elements that start with Medical.

When you click Submit Search, the screen you were on reappears, but the list on the screen now contains elements that match your search criteria.

Conducting a Basic Search
The Basic tab offers a mixture of menu-selection fields and text entry boxes you can use for the search. The particular fields on this tab vary considerably with the type of element in the original list. Generally, where you can enter information you can enter an asterisk as a wildcard.

You only enter as much information in as few fields as you need to narrow your search. Since only results matching all the values are found, it is unlikely you will ever use all the fields on this tab.

When you click Submit Search, the screen you were on reappears, but the list on the screen now contains elements that match your search criteria.
Conducting an Advanced Search

The **Advanced** tab offers the most flexible search. On this screen you can create multiple rows of customized queries. Each row is a search statement (such as *Title contains Duke*). You can be as simple or as complex as you need to narrow down your search. Although MasterControl supports quite a few rows on this screen, often one or two rows suffice.

On each row you construct logical statements in four segments:

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field</td>
<td>The drop-down list contains numerous parts of an element for you to search on. To use a grammar analogy, your selection becomes the <em>subject</em> of the statement. The options vary with each element. Select one per row.</td>
</tr>
</tbody>
</table>
| Operator | Continuing the grammar analogy, you select from this drop-down list the *verb* of the statement (such as *Contains*, *Does Not Contain*, *Equals*, or *Does Not Equal*). The options vary with the element and the item you selected in the Field column. Select one per row. **Notes:**  
  - Unlike the Simple search, you can use the *Contains* option, if available, to search for embedded letters or numbers.  
  - Selecting *Is Null* or *Is Not Null* hides the *Value* field (it is not needed). |
| Value  | In the grammar analogy, you enter here the statement’s *object* of the *verb* in this text box. For example, if your *Operator* is *Does Not Contain*, enter in this field what the *subject* of the statement must not include. You can enter an asterisk as a wildcard. One value per row. |
| Logic  | Compares the statement on the current row with the next (options are AND or OR). Logically, only used if you have more than one row. |

To add a row, click ‹ at the end of the row. To remove a row, click ✗.

When you click **Submit Search**, the screen you were on reappears, but the list on the screen now contains elements that match your search criteria.

Saving Your Search Criteria

Especially in the **Advanced** tab, it can take time to enter search criteria. If you anticipate needing a particular search again in the future, you can save any search for future reference. Saved searches are kept in **virtual folders**.

1. On any tab, click in the **Enter name here** field, and then enter a name for this search.
2. Click **Save Search**.
   
   A green wink appears announcing that your search is now saved in MasterControl as a virtual folder.

Using a Saved Search

In any tab (Simple, Basic, or Advanced), click the **Load a Saved Search** drop-down arrow, and then select the saved search (virtual folder) you want.

Your view changes to the specific tab and field details you saved. You have the option of editing the fields as needed to suit the current search – or you can immediately click **Submit Search**.

Deleting a Saved Search

If the list in **Load a Saved Search** is starting to get long with outdated searches, you can remove as many as you want by deleting corresponding virtual folders.

1. On any screen, go to the **Navigation** menu and expand **My MasterControl**.
2. Select **My Settings>Virtual Folders**.
   
   The virtual Folders screen appears.
3. On each row containing a saved search you want to delete, select the **Delete** checkbox.
4. On the gray toolbar, click the **Save** button.
   
   A confirmation message appears, warning you that deleting a Virtual Folder is permanent and cannot be retrieved.
5. Click **OK**.