

# INFORMATION SEARCH

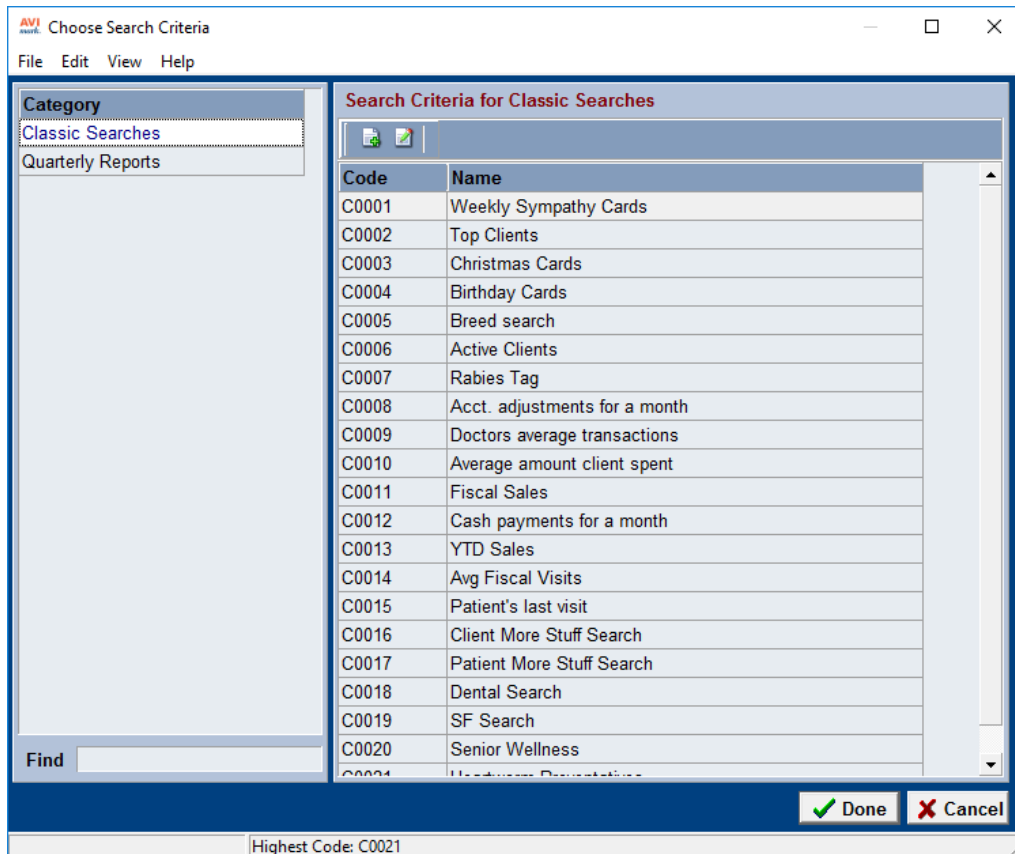
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# GETTING STARTED

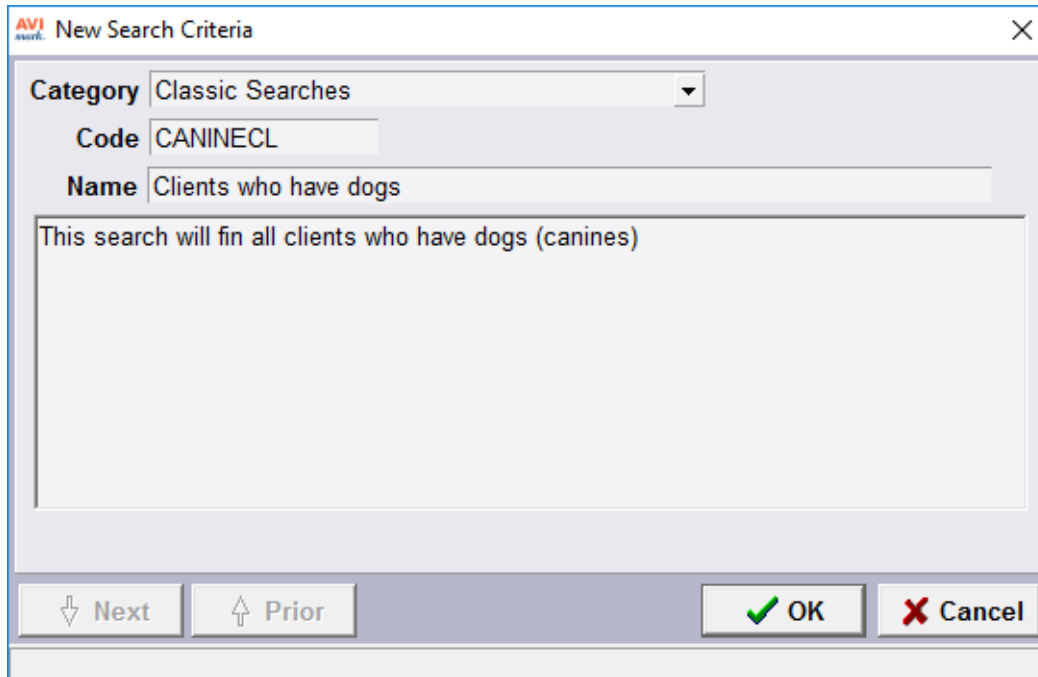
The information search feature in AVImark allows the user to create and save queries to find specific information in the program. The Information Search in version 2010.4 and later now allows more versatility and an expanded retrieval tool to access more areas within AVImark.

The new Information Search window resembles windows in other areas of AVImark; such as the Treatment and Inventory lists. **To access the Information Search feature, go to Work with | Information Search** or click on the Information Search speed bar button. Saved searches from prior AVImark versions will be converted and saved under a category named Classic Searches. To find an existing search, click on the category to see the contained searches or use the **Find** field to enter the code or the description of the search.



## Creating a New Search

New categories and searches can be created by using the **F2** button, or **right-click | New**. In the New Search Criteria window, a code and name must be entered for the search. The field in the bottom is for notes or explanations about the search. Once you click OK, the search is saved under the category that was selected.

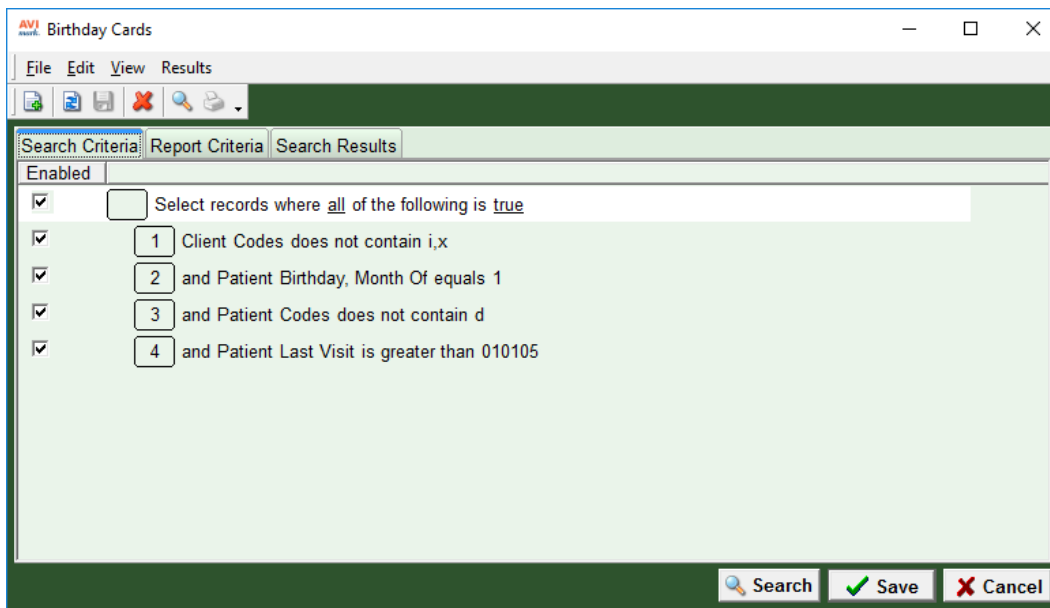


The screenshot shows a dialog box titled "New Search Criteria" with a close button (X) in the top right corner. It contains the following fields and controls:

- Category:** A dropdown menu currently showing "Classic Searches".
- Code:** A text input field containing "CANINECL".
- Name:** A text input field containing "Clients who have dogs".
- Notes:** A large text area containing the text "This search will fin all clients who have dogs (canines)".
- Navigation:** Two buttons labeled "Next" (with a downward arrow) and "Prior" (with an upward arrow).
- Actions:** Two buttons labeled "OK" (with a green checkmark) and "Cancel" (with a red X).

## Edit an Existing Search

To open the search, double-click on the name in the list. This will display the Search Criteria tab. Conditions are entered here that will “filter” the information to suit your current information search needs.



The screenshot shows the "Birthday Cards" application window with the "Search Criteria" tab selected. The window has a menu bar (File, Edit, View, Results) and a toolbar. The "Search Criteria" tab is active, showing a list of conditions under the "Enabled" section. The conditions are:

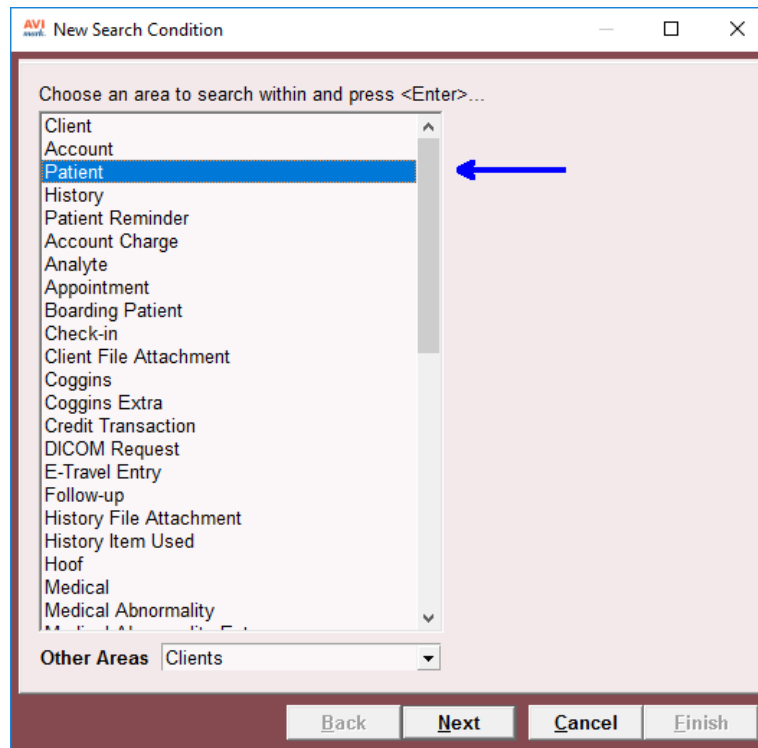
- Select records where all of the following is true
- 1 Client Codes does not contain i,x
- 2 and Patient Birthday, Month Of equals 1
- 3 and Patient Codes does not contain d
- 4 and Patient Last Visit is greater than 010105

At the bottom of the window are buttons for "Search", "Save", and "Cancel".

To enter a condition, **right-click** and select **New Condition**, or hit **F2** on the keyboard. In this window, highlight the area that is to be searched.

Click: **Next**.

Choose the field value that you are placing the condition on.

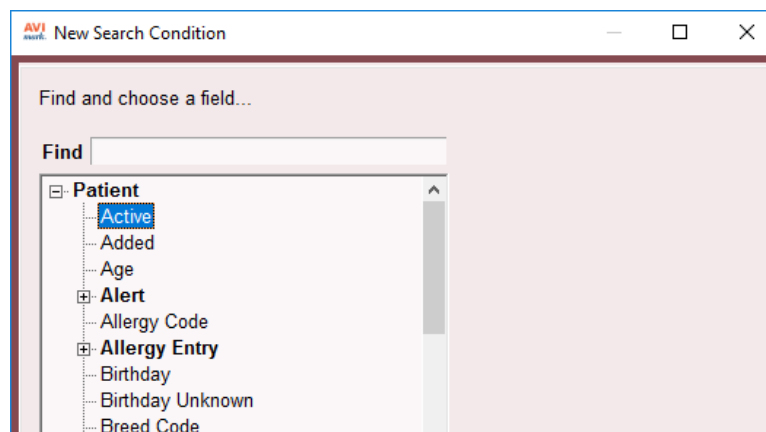


Click: **Next**.

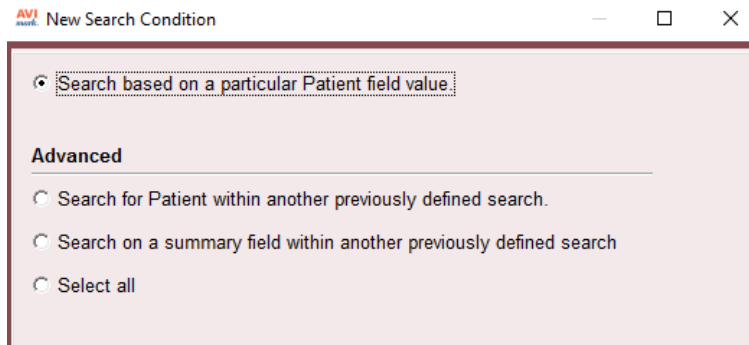
Choose to search one of the following:

- ✓ A field value
- ✓ Criteria from a previously defined search
- ✓ A summary field from a previously defined search
- ✓ All

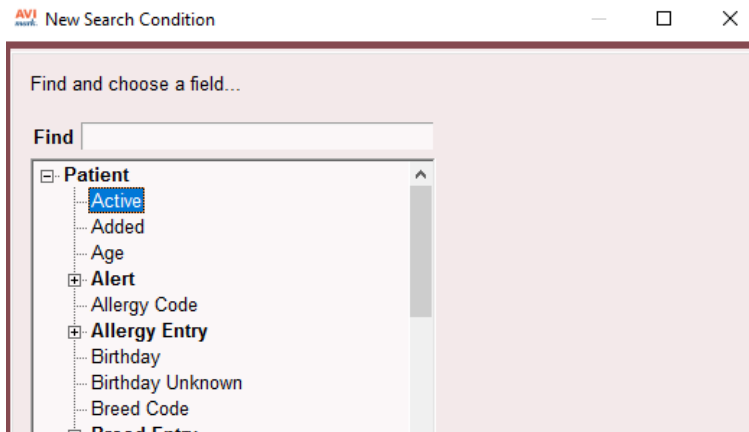
For the purpose of this tutorial, we will choose to search on a field value.



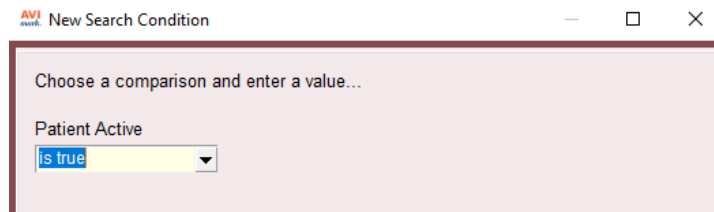
Click: **Next**. Now you will define the filters for the comparison:



Click **Next**. Select the field to define the search criteria.



Click **Next**. Enter the Search Comparison Value. This will vary depending upon the field selected.



Click: **Finish**

The “filtered” condition will now appear in the Search Criteria tab.

## Report Criteria

Once all the conditions of the search have been entered, you will need to decide what information you want to appear on your report.

You may only report the criteria that was chosen or is above the chosen conditions. For example, since a condition was chosen on the patient, only criteria for the patient and the client will be available for reporting.

Select the fields to report by:

- ✓ Double-click on the criteria.
- ✓ Drag it to the right.
- ✓ Highlight it and then use the green arrow near the center of the window to move the criteria to the report field area.

Once the reported fields are chosen, click on the **Search** button. This will automatically open the Search Results tab to show the results of the search.

## Saving, Printing, and Exporting Results

To save or export once a search has finished, you will want to go to the **Search Results** tab | **Results** on the menu bar. Once this menu is selected you will see the choices of **Email**, **Export** and **Print**.

### **Email Option**

Before being able to email the results of an information search, the email options under **Work with | Hospital Setup | Advanced | Advanced Options | search E-mail**. The System E-mail options must be completed. Please contact Technical Support for assistance.

This option is used to send emails to the clients that were found with the information search criteria.

- ✓ **Message Text** - Email Body
- ✓ **One Per Client** – Limits the number of emails sent if a client appears more than one in the search
- ✓ **Attached File** – Allows you to attach a document
- ✓ **Send in Plain Text or Send as HTML Content** – Formatting choice
- ✓ **Reply to** – Choose from a drop down selection of email addresses for clients to reply to, this is set up in work with hospital setup, advanced tab

### **Export Option**

Before being able to export into Excel, the Excel program must be installed.

This option is used to export the results of the information search to Excel as a CSV file.

- ✓ **File Name** – Allows you to name the file and by clicking ... choosing the location to save the file
- ✓ **Merge Option** – Choose to select the type of formatting for the file, the most commonly used format type is custom format
- ✓ **One Per Client** – Limits the number of emails sent if a client appears more than one in the search.

### **Print Option**

Before being able to print, printers must be available for the computer that the search is compiled on. This option allows you to print the results of a search, merge to a document, print post cards, or mailing labels.

## Using the Code Editor

The code editor is used when you want to copy a “set up” code and send it to someone else, receive a “set up”code and save it to your system, or it also can be used to set up a history More Stuff search.

To access the Code Editor, click **View** on the menu bar then select **Code Editor**.

For any additional information on the use of this feature, please contact AVImark Technical Support at (877) 838-9273.