

hal Systems Corporation Setting up Custom Search Formats

Tech Support Brief
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This document briefly describes the steps required to set up a Custom Search Format. For more information, refer to the halFILE User's Guide.

A Custom Search Format is a profile that defines which fields a particular user can see on the Search Criteria, Document Information and Search Hit List Screen. It only affects the Search module of halFILE and e.halFILE.

Rules for using Custom Search Formats

1. To use Custom Search Formats, you must enable security and set up users inside the security system of halFILE.
2. If you add one Custom Search Format, then every user must be a member of one or more Custom Search Formats.

Defining a Custom Search Format

To define a Custom Search Format:

1. Go into halFILE and run the menu selection File | Databases | Custom Search.
2. Click ADD to add a new Custom Search profile.
3. Enter the name for the Custom Search Profile and click OK.
4. Highlight the new Custom Search Profile that was added from the Custom Search Formats list and click NEXT.
5. From the list of available users, add the users that should be a part of this format.
6. Click NEXT to proceed to next tab.
7. The Search Fields screen defines what search criteria fields the user can see. Click ADD ALL to add all the fields then remove the fields you do not want them to see. Be sure to remove the system fields (PRSTAT, PRCDOC, PRSERV, PRATYPE, PRMNAME, PRFOLDER, PRQUEUE).
8. Click NEXT to proceed to the next tab.
9. The Search Type tab defines the default search type when the user goes into search. This is applicable only to halFILE (not e.halFILE). Set the default search type for these fields. Typically, the default search type would be "exact match" except for Names or Remark type fields which are typically "beginning of field".
10. Click NEXT to proceed to the next tab.
11. The Hit list tab defines what fields appear on the Hit List and the Document Information screens in Search. Click ADD ALL to add all the fields. Then remove the fields you do not want them to see. Be sure to remove the system fields (PRSTAT, PRCDOC, PRSERV, PRATYPE, PRMNAME, PRFOLDER, PRQUEUE).
12. Click FINISHED to save the Custom Search format.

IMPORTANT: Every user must be in a Custom Search format once you have defined on. So, if not all users belong to the Custom Search Format you just defined, you should immediately add another new Custom Search Format using the above procedure for the remaining users. Again, one every Custom Search Format, be sure to remove the system fields (PRSTAT, PRCDOC, PRSERV, PRATYPE, PRMNAME, PRFOLDER, PRQUEUE) although sometimes users like to include the PRSERV field because that is halFILE's document number.