

Search for a Template Inquiry — Criteria

Overview

The Property Accountability module Template Inquiry process provides the ability to search for Template records.

Navigation

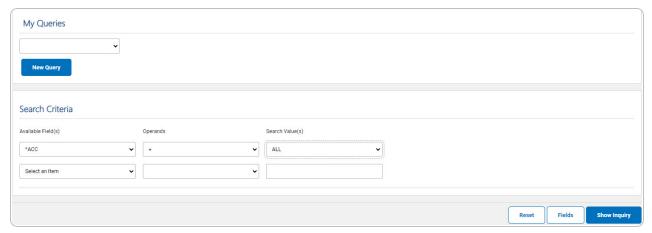
Inquiries > Attributes > Template > Template Inquiry Search Criteria page

Procedures

Search for a Template Inquiry — Criteria

One or more of the Search Criteria fields can be entered to isolate the results. By default, all results are displayed. Selecting at any point of this procedure returns all fields to the default "All" setting.

1. In the Search Criteria box, choose which available field to use in the search.



- 2. Choose which Available Field(s) to use in the search.
 - **A.** The first Available Field(s) option (ACC) automatically populates and is not editable.
 - B. Use to select the second Available Field.



Note

Adding another Available Field teria row.

automatically populates an additional search cri-

Note



Select to modify the fields used in the inquiry. The Fields Selection page opens.

- 3. Choose which Operands to use in the search.
 - **A.** Use to select the first Operands.
 - B. Use to select the second Operands.
- 4. Choose which Search Value(s) to use in the search.
 - **A.** Use to select the first Search Value.
 - B. Use to select the second Operands.

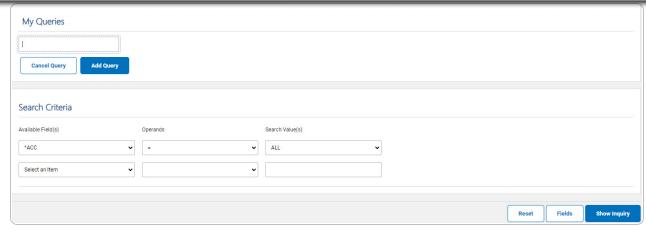
Remove an Available Field Row

- a. Use to select desired Available Field.
- b. Select Remove Filter Category . The desired row is removed.
- 5. Select Show Inquiry Results page appears.

Add a My Queries Inquiry

1. Select . The page refreshes, and My Queries changes from a drop-down field to a text field.





- 2. Enter the Query Name in the field provided. This is a 90 alphanumeric character field.
- 3. Select . The Query and the information entered in the Search Criteria grid are added to My Queries. Select cancel Query to disregard the Query.

Select Fields . The **Template Inquiry** — **Select Fields** page appears.

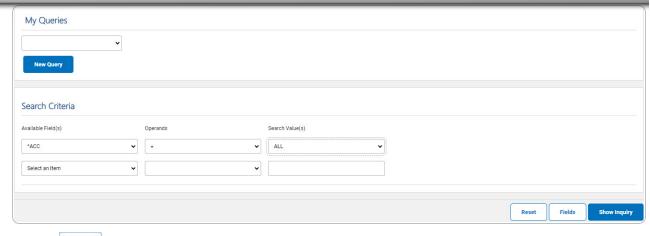
4. OR

Select Show inquiry . The **Template Inquiry — Results** page appears.

Select a My Queries Inquiry

1. Use to select the desired saved query. The page refreshes, and the selected query information appears in the search criteria grid.





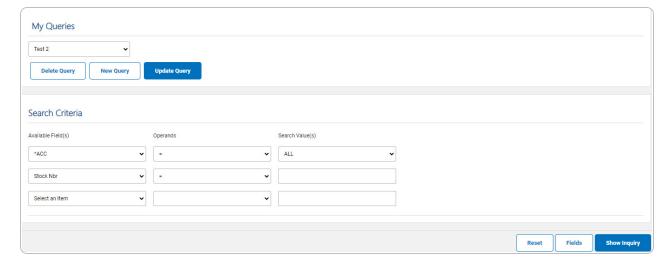
Select Fields page appears.

2. OR

Select show inquiry. The **Template Inquiry — Results** page appears.

Update a My Queries Inquiry

1. Use to select the desired saved query. The page refreshes, the search criteria fields change, and New Query is joined by and Delete Query and The selected query information appears in the search criteria grid.



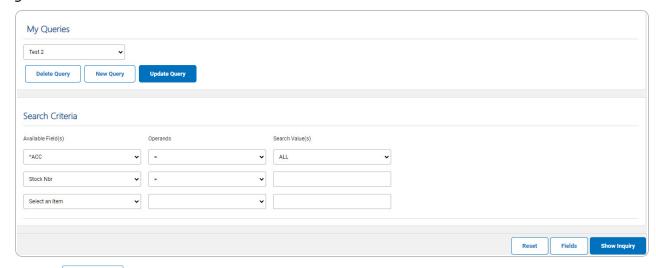


- 2. Select Update Query . The query information is updated.
 - Select Fields page appears.
- 3. OR

Select Show inquiry . The **Template Inquiry — Results** page appears.

Delete a My Queries Inquiry

1. Use to select the desired saved query. The page refreshes, and New Query is joined by update Query and Delete Query. The selected query information appears in the search criteria grid.



2. Select Delete Query . The query information is removed.

Revise the Fields for the Inquiry

Select Fields page appears.





Search for a Template Inquiry — Results

Navigation

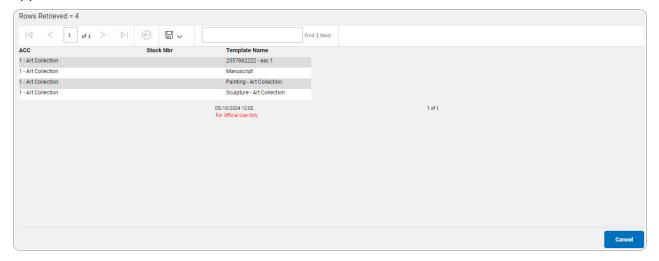
Inquiries > Attributes > Template > Search Criteria > Search Results page > Template Inquiry

Procedures

Export the Template Inquiry Results

Selecting at any point of this procedure removes all revisions and closes the page. **Bold** numbered steps are required.

1. Select to choose the print format (Excel, PDF, or Word). The procedure leaves the application based on the selection made.



To reach the optional fields, refer to the Template Inquiry — Field Selection page.

2. Select . The **Template Inquiry Search Criteria** page appears.

Note



Search the Results

- 1. Select the empty field Find | Next |
- 2. Enter the characters or words to search. *Entries are not case sensitive*.
- 3. Select Find to search for the entry. *The entry appears highlighted in the file.*
- 4. Select Next to find the next matching value. This feature is available if multiple results are found.

Unclassified



Select Fields for the Template Inquiry

Navigation

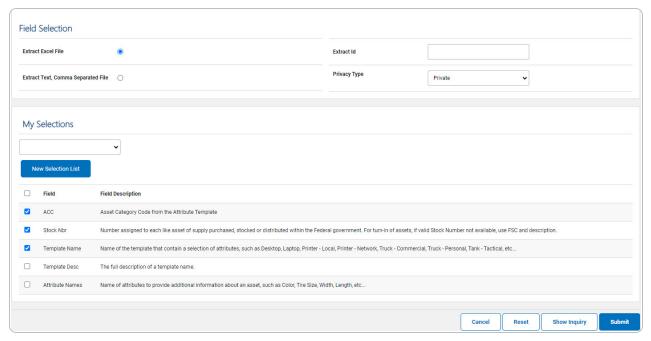
Inquiries > Attributes > Template > Search Criteria > Fields > Template Inquiry Fields Selection page

Procedures

Choose the Extracted Inquiry File Details

Selecting at any point of this procedure removes all revisions and closes the page, whereas selecting returns all fields to the default "All" setting. **Bold** numbered steps are required.

1. Select . The **Template Inquiry** page appears.



2. Choose the desired file type:



• Click to select Extract Excel File. The extracted file on the **View Inquiry Extract** page is an .XLS file.

OR

- Click to select Extract Text, Comma Separated File. *The extracted file on the* **View Inquiry Extract** page is a .CSV file.
- 3. Enter an unique identifier in the Extract ID field provided. This adds the identifier to the link on the **View Inquiry Extract** page, and does not change the file name.
- 4. Use to select the Privacy Type.

Add a Selection List

1. Select New Selection List . The page refreshes, and Selections changes from a drop-down field to a text field.



Selecting at any time from this point of the procedure removes all revisions and returns My Selections to a drop-down field.

2. Select Add Selection List . The page refreshes, and the selected list is added.

Add Selection List is replaced by Update Selection List and Delete Selection List

Select show inquiry for small volumes of data. The **Template Inquiry** — **Results** page appears.

3.





OR

Select Submit for large volumes of data. The **Template Inquiry Transaction Status** page appears.

Use a Predetermined Field Selection List

1. Use to display the Selection List.



Select show inquiry for small volumes of data. The **Template Inquiry** — **Results** page appears.

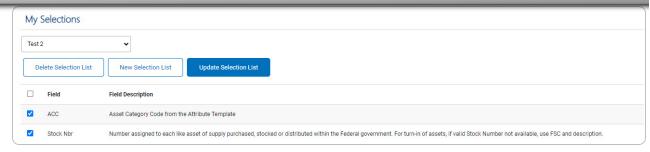
2. **OR**

Select for large volumes of data. The **Template Inquiry Transaction Status** page appears.

Update a Selection List

1. Use to select the desired Selection List. The page refreshes, the search criteria fields change, and New Selection List is joined by Update Selection List and Delete Selection List.





2. Select Update Selection List . The page refreshes.

Select show inquiry for small volumes of data. The **Template Inquiry** — **Results** page appears.

3. **OR**

Select for large volumes of data. The **Template Inquiry Transaction Status** page appears.

Delete a Selection List

1. Use to select the desired Selection List. *The page refreshes, the search criteria fields*change, and New Selection List is joined by Update Selection List and Delete Selection List.



2. Select Delete Selection List . The page refreshes and the list is immediately deleted.

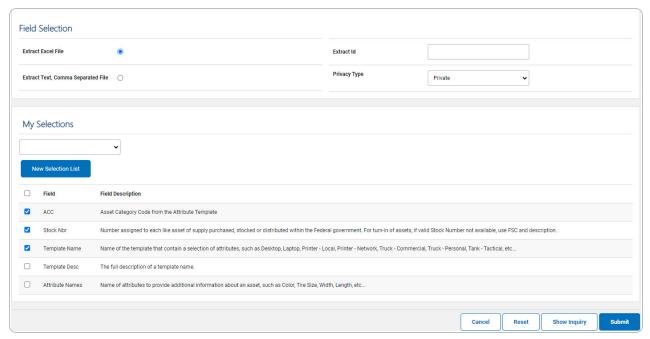


Modify the Fields Used for the Inquiry

Selecting at any point of this procedure removes all revisions and closes the page. **Bold** numbered steps are required.

One or more of the Search Criteria fields can be entered to isolate the results. By default, all results are displayed. Selecting at any point of this procedure returns all fields to the default "All" setting.

1. Select . The **Template Inquiry** page appears.



2. Select the fields required for the inquiry. *The first 3 fields are automatically selected.*





The number of fields selected determines the amount of data returned from the database. The more data returned, the longer the inquiry takes.

Select show inquiry for small volumes of data. The **Template Inquiry** — **Results** page appears.

OR

3.





Select Submit for large volumes of data. The **Template Inquiry Transaction Status** page appears.





View the Template Inquiry Detail

Navigation

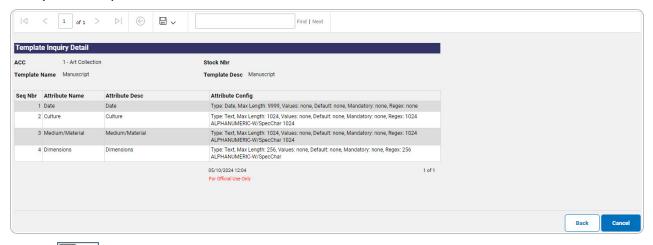
Inquiries > Attributes > Template > Search Criteria > Search Results > Inquiry Row hyperlink > Template Inquiry Detail page

Procedures

Export the Template Inquiry Detail

Selecting at any point of this procedure removes all revisions and closes the page. **Bold** numbered steps are required.

1. Verify the Template tab.



- 2. Select to choose the print format (Excel, PDF, or Word). The procedure leaves the application based on the selection made.
- 3. Follow the prompts provided by the computer.

Select Cancel . The **Template Inquiry** — **Criteria** page appears.

4.

OR



Select . The **Template Inquiry** — **Results** page appears.

Search the Results

- Select the empty field Find | Next |
- 2. Enter the characters or words to search. *Entries are not case sensitive.*
- 3. Select Find to search for the entry. The entry appears highlighted in the file.
- 4. Select Next to find the next matching value. This feature is available if multiple results are found.