How to use filters to refine your search

A filter enables you to refine your search criteria further, by adding some additional search criteria. A filter can be applied before running a search or it can be used to refine search results after the initial search has been executed. For example, you might want to find all reservations activated on a particular date as opposed to all reservations. A number of default filter options are provided for different searches.

To apply a filter

1. Access the relevant search window, e.g. Titles, enter a search term for the Title (first few words) e.g. time management.
2. On the right, click Refine Search.
3. OLIB displays the Titles domain Refine Search dialog. This displays a list of filter options you can apply to the current search window.
4. Filter options are listed in two columns
   - General Fields
   - Date Fields

Click one of the filter options to display entry boxes for you to enter your criteria, e.g. Series.

Use the scroll bar on the right for long lists.

5. OLIB displays the text refinement options next to your search criteria.

Select e.g. Begins with; enter the basic search criteria or a wildcard % in the search refinement box.

6. Click Search and the matching records are displayed below.

You can select more than one Filter criteria to further refine the search. OLIB displays all filters under the search box.

Search Fields box

This is at the top of the Refine Search dialog above. Use this to type part of a field name, e.g. "op" to navigate directly to that field to filter on it.

For example:
The Search Fields box is only shown if there are more than 15 fields listed in either column.

(The search provides firstly the items whose value starts with the letters entered, then items containing words that start with the letters entered, and finally items containing the letters entered anywhere in their value, listed in either column).

Linked domains drop down

The Linked Domains are in an initially collapsed list accessible by clicking on Linked Domains.

If you enter text in Search Fields that is not found on the main fields, OLIB automatically searches for it in Linked Domains and shows matching fields below.

Filter operators

See also the various Filter Operators that are available; on List, on Value, on Date.

To modify the filter details

1. Edit the drop down / entry boxes of the filter. The search criteria can also be edited if necessary.
2. Click Search again.

The search is re-executed with the new filter details.

To delete a Filter

1. Uncheck the box next to the filter that is no longer required.
2. The search is re-executed without the filter.
3. Alternatively remove all filter operations by clicking on minus options ▼
If a filtered search would be useful to keep for future use then you can keep it as a Saved Search. All the filter details are saved in the search together with the filter search criteria. The filter remains in place until you close the search window or click Delete on the filter. Note that all filter values are case sensitive. Filters can be permanently disabled or their names can be changed by the system manager: Change filter names.

Include / exclude fields from refinement dialog

The system administrator can control what fields are available for filtering in the Refine Search dialog (including the Linked Domains). This is now manageable through the Enable Filter flag on the attribute record:

1. Go to Admin Client Configuration.
2. In the Attributes domain search for the Attribute (e.g. search by Attribute Description).
3. In the Attribute Details set Enable Filter = No (Yes/NULL allows filtering).
4. Save changes.

Note that for the changes to take effect you need to rebuild OLIB Web. Filters can only be applied to attributes which have a value for "Constrain" as this defines how the filter should be applied (e.g. Text, Date or Number).