

A Truly Advanced Search

The Advanced Search function in CollectiveAccess isn't just a Boolean gimmick- it gives you the ability to create totally customizable search forms and as many forms wanted or needed for a project. It is possible create complex cross-table forms, simple forms to access unique data, or a general-purpose form for any collection management project. This brief tutorial will explain how to **create**, **edit** and **use** Advanced Search forms using the Form Settings.

Creating Advanced Search Forms

Step 1: Open the My Search Form Preferences

- Under **Manage** in the top right global navigation, select **My search forms** from the dropdown menu. Here you will see all the Search Forms currently in your system.

Step 2: Open New form

- To create a new search form, click on the green plus sign [+] labeled "New form."
- Before you can create and edit a form, you must save some basic information:
 - Enter some kind of alpha-numerical combination in the **Form code** text box
 - Select the **Search Type** - this determines which fields can be searched
 - Enter a Preferred name that will be the label for the form
- Click **Save** to save your new form. This will also open the **Form Settings**.
- You should now see "**(i) Added Search Form**" at the top of your screen.

Step 3: Define Form Settings

- First select the **Rendering mode**; this defines how you would like the form renders for display:
 - "Individual collapsible groups" allows you to create multi-line sections that can collapse
 - "One form element per line" allows only one field per line to display and does not permit collapse
- Next click on the green plus sign [+] with the label "Add group." This activates the first group of elements.
- Now select which element from the dropdown menu you would like to display first in this group.
 - To add the element to this group, simple click on the green plus sign [+] beside the element dropdown menu. The element label will appear in a gray box, this indicates that the element has been added and another can be defined.
 - Should you want to delete an element, simply click on the red "x" [x] beside an element label in the gray box.

- Once you have added all the desired elements into group, you can again click on the green plus sign [+] with the label “Add group” to start another group. Repeat adding elements just as described above.
- You can add as many groups and elements as you want/need, but remember that only forms with the Rendering mode “Individual collapsible groups” will allow for multiple elements in groups. If you choose “One form element per line” then be sure to only add one element in a group.
- **Finally click SAVE** once you have added all the groups and elements you need/want. You will see “**(i) Added Search Form**” at the top of your screen and it is now safe to navigate away from this screen.

Editing Saved Advanced Search Form

- Click on the ←Search Form List (1/x) → link on the upper left local navigation OR click on Manage > My Search Forms in the upper right global navigation to return to the Search Form List.
- To edit any form, simply click on the small edit icon to the right of a form’s record in the list. This icon is a rectangle with small gray lines and one blue line; it looks sort of looks like a form actually.
- You can also delete forms here by clicking on the red “x” [x]
- After editing a form, click **SAVE** before moving to another screen or else changes will not be saved.

Using the Advanced Search Forms for Searching in FIND

- Hover your mouse over the **Find** tab in upper right global navigation and click on a type (objects, entities, places, events, etc) from the dropdown menu to open the **Find** page.
- Click on the **Advanced Search** tab on the left sidebar local navigation options.
- First select which Form you would like to use from the Form selection dropdown menu on the upper right corner. There you will see all the search forms in your database to choose from.
 - Click on the desired form.
 - Enter your search terms in the appropriate fields and click **Search** to run the query.
 - Results will display below the search form. Click on **Hide search form >** to collapse the form for easy viewing of search results. Click on **Show search form >** to return to the form.
 - Click on the plus sign [+] to hide groups or show groups at anytime during a search.
- Should you want to change search forms at any time, simply choose another from the form dropdown menu. Any applicable search terms will be carried over from the previous form into the new form.