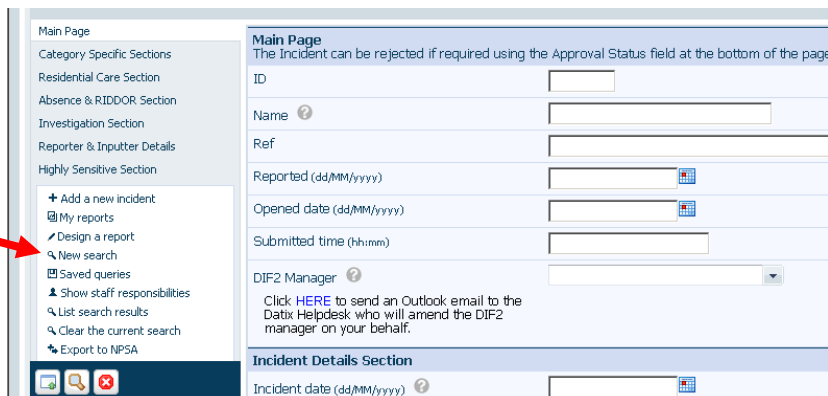# Datix Guidance Document

Searching for records and saving queries

How to search for records in Datix

Within Datix there is the ability to search for records by running a query. The benefits are that you can enter a search and save it as a query, which can be used on a regular basis. As more information is added to the system this will, of course, be included in your query. This is a simple process and is described below.

- Log in to Datix
- Click on the Module you wish to report on (in this instance Incidents)
- Click on **New Search** (from the left panel on the main page)
- Enter your search criteria into the blank fields – you can search from any field on the screen.
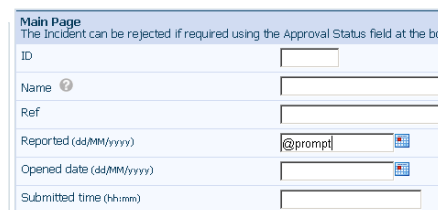- Click the (magnifying glass) from the floating toolbar to show the results.

Floating Toolbar (always located bottom left of the page)
Hover mouse over each icon to see what it does
- Menu (shows all options from the top left of Main Page)
- Search (searches for the record)
- Cancel (closes the record without saving changes)
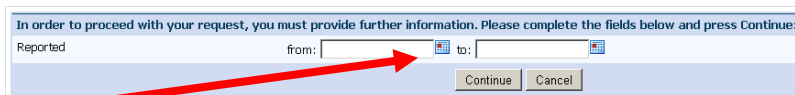
- Multiple codes can be searched by selecting all codes that apply in each field
- You can also enter search symbols for instance you may wish to search between certain dates. Adding the **@prompt** will allow you to do this (see symbols on page 5+6).
- You then need to go to the bottom of the screen and click on **Search**.

- As you entered the @prompt symbol in your query you will then be presented with a date screen.
- Enter dates and then click **Continue**. The query will then produce all requested records. If no dates are added all records will be shown.

Examples of Simple Searches:

Please Note: If you don't want to include rejected incidents in your search criteria ensure you search for all approval types within Approval Status except rejected.

➢ **Number of Incidents reported within the previous month:**
Use the @lastmonth prompt in Incident Date field. This will return all records you have permission to see that occurred within the last month.

➢ **Number of Incidents by named DIF2 Manager:**
Search for required DIF2 Managers name. This will return all records where the DIF2 Manager has been named.

➢ **Number of Incidents by Specific Category or Sub-Category within specific date range:**
Select the category or Sub-categories required and use the @prompt search symbol within the Incident date field.

➢ **Number of Incidents reported within a particular Property Location / Scheme:**
Select the required Property location / Scheme within the Location Section.

Examples of More Complex Searches:

Please Note: If you don't want to include rejected incidents in your search criteria ensure you search for all approval types within Approval Status except rejected.

➢ **Number of Level 1 Incidents reported within the previous month within a specific Directorate:**
Use the @lastmonth prompt in Incident Date field, select specific Directorate and Level 1 Incidents. This will return all records you have permission to see meeting the critiera.

➢ **Number of Incidents by named DIF2 Manager within New Incidents or Review by Manager Approval status:**
Search for required DIF2 Managers name and incidents with an approval status of New or Review by Manager.

➢ **Number of False Alarm Incidents within specific date range with Accidental Intent where Fire Service Attended:**

Select False Alarm Sub-categories, add the @prompt search symbol within the Incident date field and select Yes to Fire Service Attend in the Category Specific Section.

Save Queries

If you want to use the same search query on a regular basis without starting from scratch the query can be saved for future use:

- To save the query, click on '**Save the current search as a query**' (top right or bottom right of the screen).
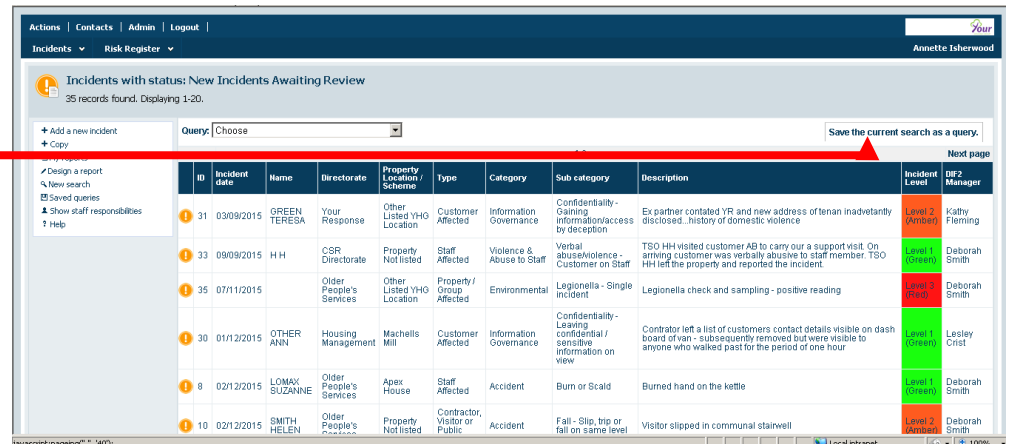
- Click in the **Save as** field to type the name of the query (example filename "FB – False Alarm Acc Intent @prompt")
- Leave the Query type as "**Accessible only to you**".
- Click **Save**.
- The query is now saved and can be run at anytime.

Run Queries

- From the Incidents page click the **Saved queries** link to view all queries.
- Select your query from the drop down box and then select **Run query**.
- Enter the relevant dates.
- Click **Continue** for the query
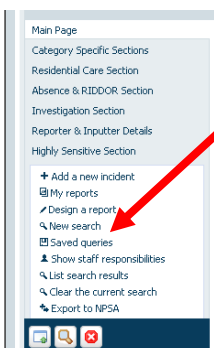
details to appear.

NB: A full list of symbols is attached to this document for your reference

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SEARCH SYMBOLS TO HELP RUN QUERIES IN DATIX

Symbol	Definition
*	The asterisk identifies any number of unknown characters. For instance, searching with '*fall*' in the description field will find all records where 'fall' appears somewhere in the field, regardless of how much text is on either side of the word.
=	The single equal-to sign tells the system that you want all records where the field concerned does not contain a value (that is, the field is empty).
==	The double equal-to sign tells the system that you want all records where the field concerned contains a value.
>	When searching any date or time field, you can use the more-than sign to search for all records where the field contains a date or time which is later than that stated. For instance, '>31/12/2005' will find all records where the field contains a date falling after 31/12/005.
>=	Similar to the above instruction, the more-than OR equal-to sign will include, in the search results, any records with the date / time you have stated.
<	When searching any date or time field, you can use the less-than sign to search for all records where the field contains a date or time which is earlier than that stated. For instance, '<01/04/2006' will find all records where the field contains a date falling before 01/04/2006.
<=	Similar to the above instruction, the less-than OR equal-to sign will include, in the search results, any records with the date / time you have stated.
:	The colon is used between two dates to indicate a date range. For instance, putting '01/01/2006:31/01/2006' in the incident date field will find all incidents which occurred in January 2006.
@today	This instruction can be used only for date fields. It will return all records where the date concerned is today's date.
@week	This instruction can be used only for date fields. Using this will return all records where the date concerned falls within the current week. Note: The 'week' runs from Monday until Sunday, so using this search instruction on a Monday would

Symbol	Definition
	return only that day's records (as Monday is the first day of the week).
@last week	This instruction can be used only for date fields. It will return all records where the date concerned falls within the previous week. Note: The 'week' runs from Monday until Sunday, so this search instruction will return all records for the week up to the previous Sunday, as opposed to simply returning records for the past 7 days.
@month	This instruction can be used only for date fields. It will return all records where the date concerned falls within the current month.
@lastmonth	This instruction can be used only for date fields. It will return all records where the date concerned falls within the previous month.
@quarter	This instruction can be used only for date fields. It will return all records where the date concerned falls within the current quarter. DATIX uses the standard quarters when returning records using this search instruction: **Q1** = 01/01-31/03 **Q2** = 01/04 -30/06 **Q3** = 01/07-30/09 **Q4** = 01/10 -31/12
@lastquarter	This instruction can be used only for date fields. It will return all records where the date concerned falls within the current quarter. See above entry for further information on searching by quarter.
@year	This instruction can be used only for date fields. It will return all records where the date concerned falls within the *current* calendar year (01/01 - 31/12).
@lastyear	This instruction can be used only for date fields. It will return all records where the date concerned falls within the *previous* calendar year (01/01 - 31/12).
@finyear	This instruction can be used only for date fields. It will return all records where the date concerned falls within the *current* financial year (01/04 - 31/03).

@lastfinyear	This instruction can be used only for date fields. It will return all records where the date concerned falls within the *previous* financial year (01/04 - 31/03).
@prompt	This instruction can be used only for date fields. After pressing the Search button, you will be prompted to enter the start and end dates for a date range.