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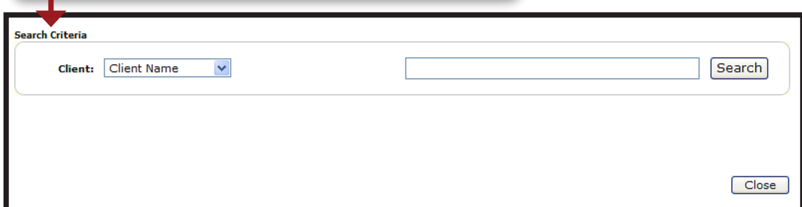
Searching for Clients When Security is Not Granted for all Branches

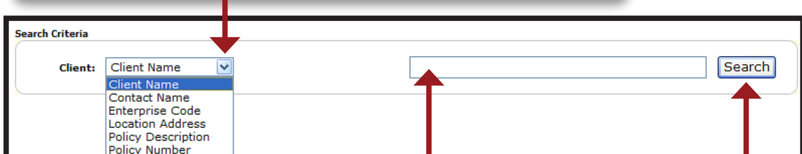
The **Global Search** function in Nexsure provides efficiency by allowing an organization-wide search for clients without having to exit the current screen and is also useful for employees who have limited access to quickly identify assignments associated to the client. To take advantage of this search feature perform the following steps:

1. On the **Primary** menu, click the **Global Search** icon.

The **Search Criteria** dialog box is displayed.



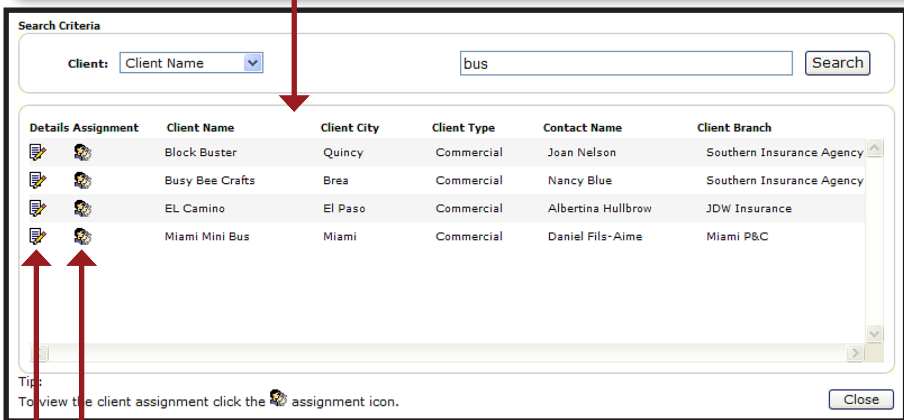
2. In the **Client** list, select the criteria for the search.



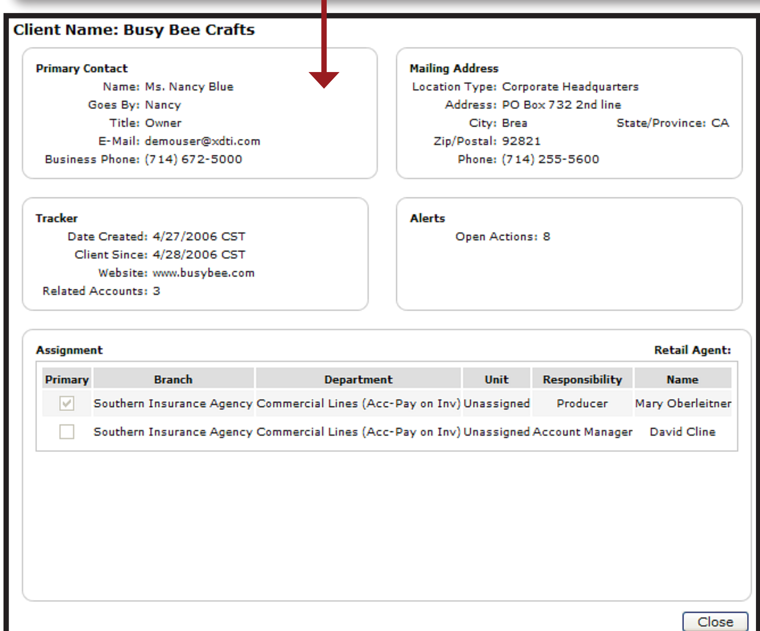
3. In the text box enter at least two characters. Keep in mind that entering fewer characters will return a broader search result. Entering most of the search criteria will return more specific results.

4. Click **Search**.

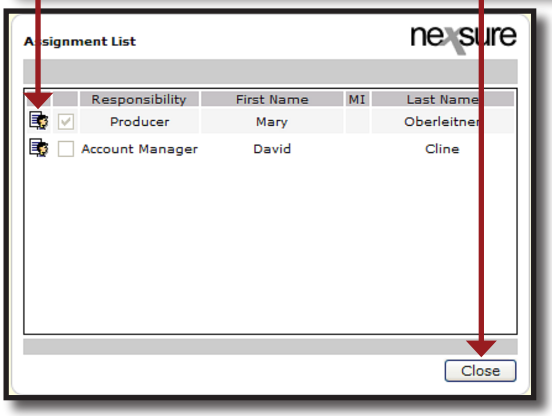
5. When the results are returned, security access dictates what functionality is available to the user.



6. Click the **Details** icon, the client **card file** tab is displayed, but only if the user has the appropriate branch security. A user with or without security access to the appropriate branch will have access to the **Assignment** icon which will allow them to see who is assigned to the client.



7. On the **Assignment List** dialog box, click the **Assignment Details** icon to see the assignments added to the client, all users will have access to this option. Click **Close** before starting another global search.



Note: To ensure access to the **Global Search** icon, select the global search **View** rights check box on the security template under the **Primary Menu Resource Group**. For more information on security in Nexsure, see "Security", in Chapter 9, *Admin Training Manual,* located in Nexsure Help under the topic of **Supporting Documents**.