

[previous](#) [Home](#) [next](#)

## 3.05 Using the Advanced Search

### Syntax Description of the Advanced Search

**Document Type:** or **Document Type** Finds all the information for the document type **Document type: Field Content {Comparison Operator} "Value"** Finds all the information for the document type based on the expression of the field's contents.

The field content refers to the description of the field and can be loaded in the assistant of the advanced search or can be viewed in the document. Currently The following expressions are supported as comparison operators:

| No. | Operator    | Description                                                              | Example                                                        |
|-----|-------------|--------------------------------------------------------------------------|----------------------------------------------------------------|
| 1   | =           | Check field content to equality                                          | Status = "active"                                              |
| 2   | !=          | Check field content to inequality                                        | Status != "active"                                             |
| 3   | <           | Check, whether field content is smaller than the value                   | Date < "1.03.2007"                                             |
| 4   | < =         | Check, whether field content is smaller or equal to the value            | Date < = "1.03.2007"                                           |
| 5   | >           | Check, whether field content is larger than the value                    | Date > "1.03.2007"                                             |
| 6   | > =         | Check, whether field content is larger or equal to the value             | Date > = "1.03.2007"                                           |
| 7   | LIKE        | Check, whether the field content contains the value                      | Employee LIKE "Meier"                                          |
| 8   | CONTAINS    | Check, whether the field content of a multiple choice contains the value | Project manager CONTAINS "Meier"                               |
| 9   | STARTS_WITH | Check, whether the field content starts with the value                   | Employee STARTS_WITH "Peter"                                   |
| 10  | ENDS_WITH   | Check, whether the field content ends with the value                     | Employee ENDS_WITH "Meier"                                     |
| 11  | - >         | Field points to the document                                             | Employee LIKE "Meier" AND Project.Project manager - > Employee |

**Note:** The operators ignore upper and lower case, like and LIKE are therefore both valid.

Query 1 finds all the documents, where the field content status is exactly "active" and Query 2 finds all documents, where this content is not equal. The queries 3 to 6 compare the field content date, where the equal sign considers the date itself. Query 7 compares, whether the value is in the field content (for example, employee LIKE "Meier" finds all employees with Meier ⇒ Klaus Meier, Monika Meyer-Grund, ...). Query 9 finds all the documents, where the field content starts with the value and query 10 finds all documents, where the field content ends with the value. Query 11 finds all the information, where the employee Meier is listed as a project manager. This query points to a document and must be used whenever the requested field content a multiple selection is

Queries can also contain a number of associated conditions or be inverted. Currently the following operators are supported:

| No. | Operator | Description                                 | Example                                        |
|-----|----------|---------------------------------------------|------------------------------------------------|
| 1   | AND      | And-Operator (both values must be met)      | Status = "active" AND Status "Advanced Effort" |
| 2   | OR       | Or-Operator (one of the values must be met) | Status = "active" OR Status "Advanced Effort"  |
| 3   | NOT      | Negation                                    | NOT (Status = "passive")                       |

By adding SORT the results can additionally be sorted. Example: SORT 'Description' sorts in the field "description" in ascending order. Ascending (ASC) is the standard setting for sorting and must not be indicated explicitly. DESC sorts in descending order. Example: SORT 'Description' DESC sorts in the field "description" in descending order.

In the Advanced Search, as of version 2.5, fixed variables can also be used, for example if the logged on user or the current date is needed:

| No. | Variable        | Description                           | Example                                                                                |
|-----|-----------------|---------------------------------------|----------------------------------------------------------------------------------------|
| 1   | \$today         | current day                           | Date = \$today                                                                         |
| 2   | \$now           | current day and current time          | Date ← \$now                                                                           |
| 3   | \$user          | Link to current (registered) employee | Employee = \$user (Example Link in jobs on employees; comparison to LIKE not possible) |
| 4   | \$username      | key of the current employee           | Employee LIKE \$username; Employee = \$username;                                       |
| 5   | \$userfirstname | First name of the current employee    | Employee.Firstname LIKE \$userfirstname; Employee.Firstname = \$userfirstname;         |
| 6   | \$userlastname  | Last name of the current employee     | Employee.Name LIKE \$userlastname; Employee.Name = \$userlastname;                     |

## Using the Advanced-Search

The Advanced Search is located in the functional area of the query manager (left part of the application).

**Query Manager**

Overview queries

Edit queries All queries Latest queries Reload

Customer Project Action Risk Invoice header Payment Employee

Latest queries

|   | Name             | Report   | Format | Start |
|---|------------------|----------|--------|-------|
| 1 | Mitarbeiterliste |          |        |       |
| 2 | Open Actions     |          |        |       |
| 3 | Actions01        |          |        |       |
| 4 | AllClosedActions |          |        |       |
| 5 | AllOpenActions   |          |        |       |
| 6 | Aktionen         |          |        |       |
| 7 | Projektliste     | Projekte | VIEW   |       |

**Search**

Selection

Name

Query

Lookup Document types Document fields Field values

Report

Report

Format

Chart period

Start  End

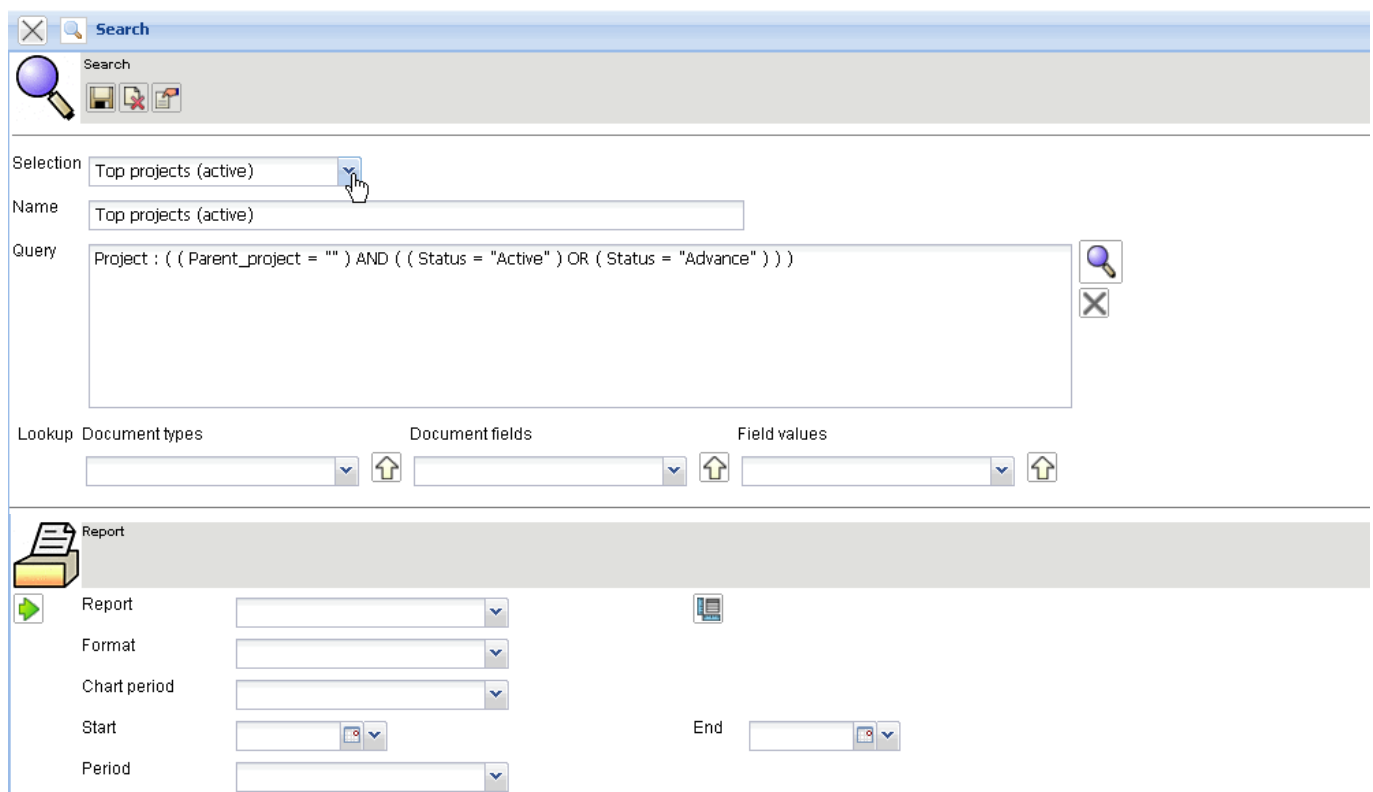
Period

The Advanced Search allows you to either revert saved searches or define your own queries.

## Using Saved Queries

A list of all saved searches can be accessed via the list field with the item “selection”.

For example, if the search query “main projects (active)” should be invoked, only the relevant entry from the list has to be selected. By clicking on the green check mark, the corresponding query is loaded (if Java Script is not activated).



Selection: Top projects (active)

Name: Top projects (active)

Query: Project : ( ( Parent\_project = "" ) AND ( ( Status = "Active" ) OR ( Status = "Advance" ) ) )

Lookup: Document types, Document fields, Field values

In the field "Query", the input for this query appears. The query

**Project : ( ( Top Project = "" ) AND ( ( Status = "Active" ) OR ( Status = "Advance" ) ) )**  
finds all running main projects (top project must be empty and the status must be set to active or advance).



performs then the search query ...



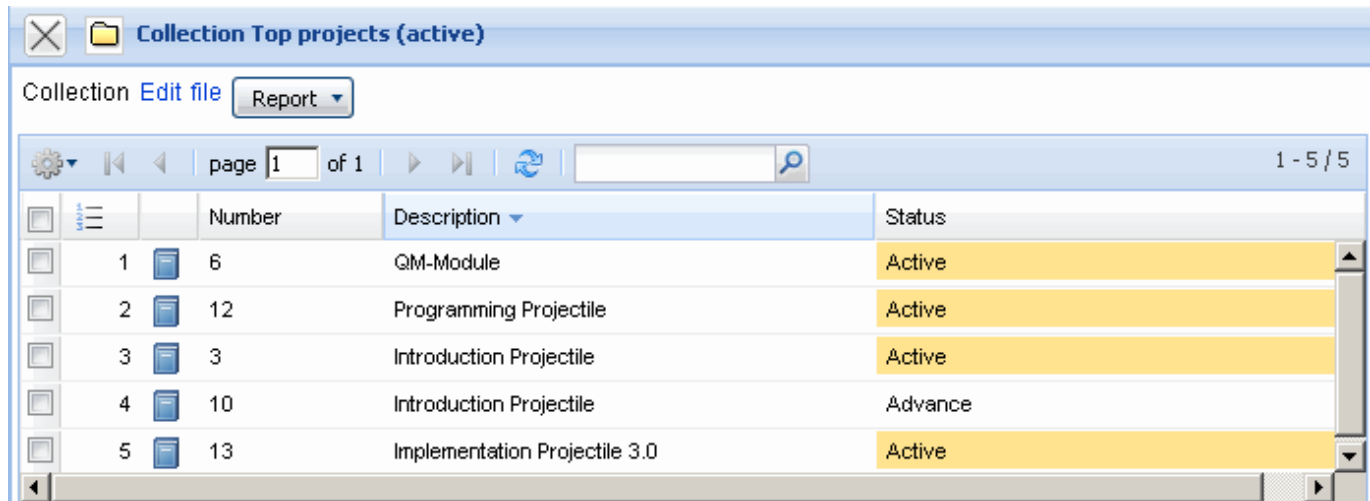
Selection: Top projects (active)

Name: Top projects (active)

Query: Project : ( ( Parent\_project = "" ) AND ( ( Status = "Active" ) OR ( Status = "Advance" ) ) )

Lookup: Document types, Document fields, Field values

... and lists the following search results:



|   | Number | Description                   | Status  |
|---|--------|-------------------------------|---------|
| 1 | 6      | QM-Module                     | Active  |
| 2 | 12     | Programming Projectile        | Active  |
| 3 | 3      | Introduction Projectile       | Active  |
| 4 | 10     | Introduction Projectile       | Advance |
| 5 | 13     | Implementation Projectile 3.0 | Active  |

### [[3.05 Bedienung der Profi-Suche (Fortsetzung)|... continued 1]]

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