

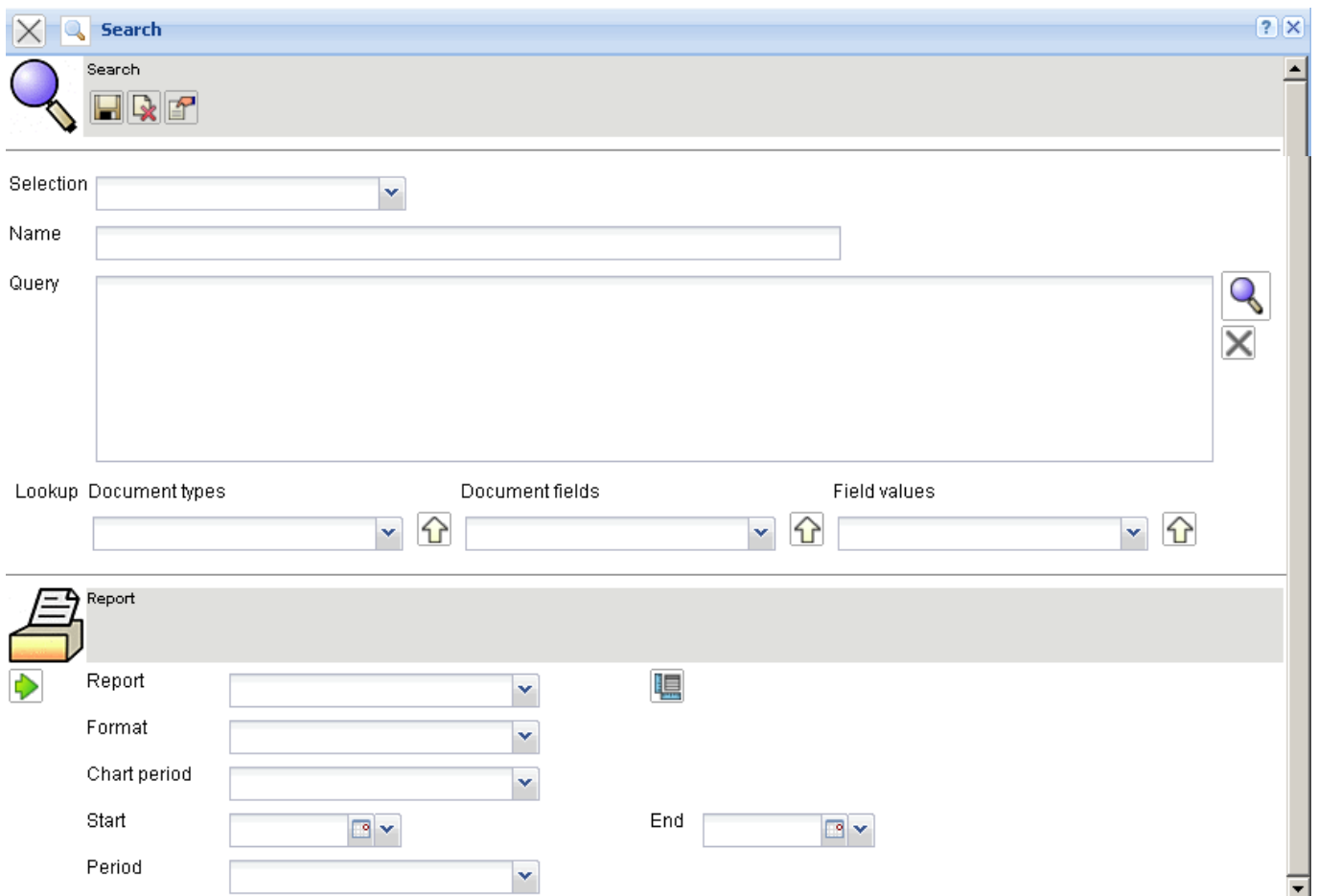
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# 3.05 Using the Advanced Search (continued 1)

## Creating New Search Queries

Besides using stored search queries, it is also possible to create your own new search queries. To do this, select the list field of the entry "Look up Document types". All Projectiles document types are listed. This way it can be defined, which document is searched.

In the following example, a query should be created for the invoices:




In the field "Name" the new query is named ...

The screenshot shows the 'Search' window with the following configuration:

- Name:** outgoing invoice
- Query:** (Empty)
- Document types:** Invoice\_header
- Document fields:** (Empty)
- Field values:** (Empty)

A yellow arrow icon is positioned over the 'Document fields' dropdown menu.

... and with the yellow arrow (look up) the entry is copied in the query. Then, the query is saved with .

The screenshot shows the 'Search' window with the following configuration:

- Name:** outgoing invoice
- Query:** Invoice\_header:
- Document types:** Invoice\_header
- Document fields:** (Empty)
- Field values:** (Empty)

The 'Save' icon in the top left toolbar is highlighted with a mouse cursor.

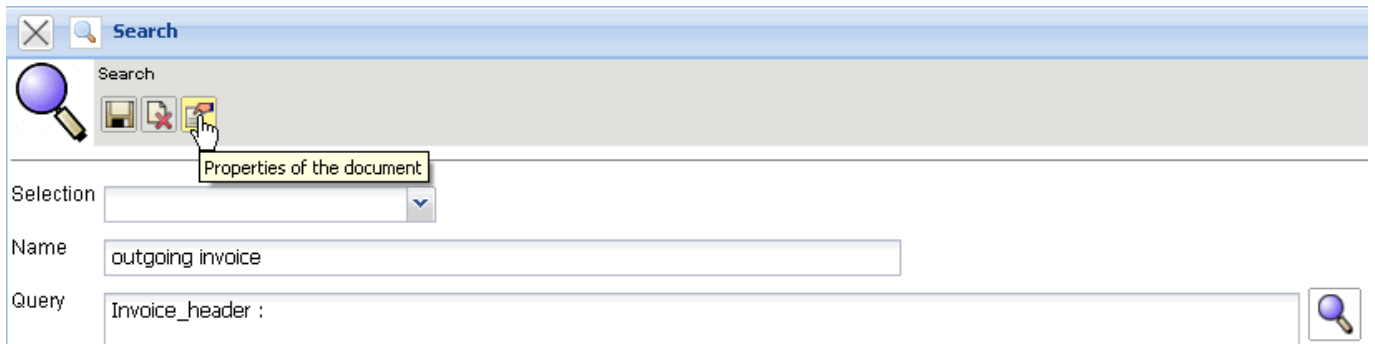
After clicking save, the advanced search is automatically available in the search query manager.

The screenshot shows a dropdown menu with the following items:


- AB outgoing invoice
- AB Partner

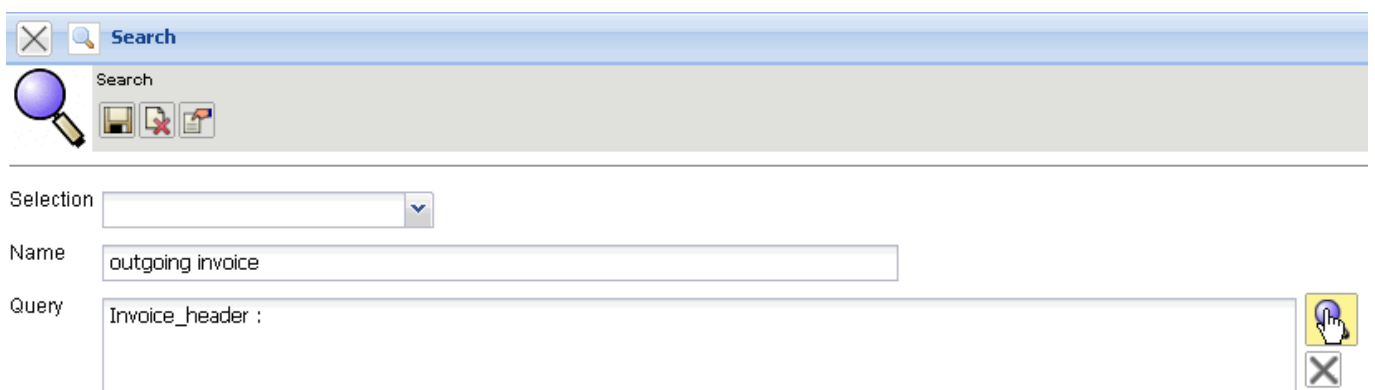
A mouse cursor is pointing at the 'AB outgoing invoice' entry.

To use the advanced search, access rights (administration - actions; see also administration guide) can be assigned.



### The Query

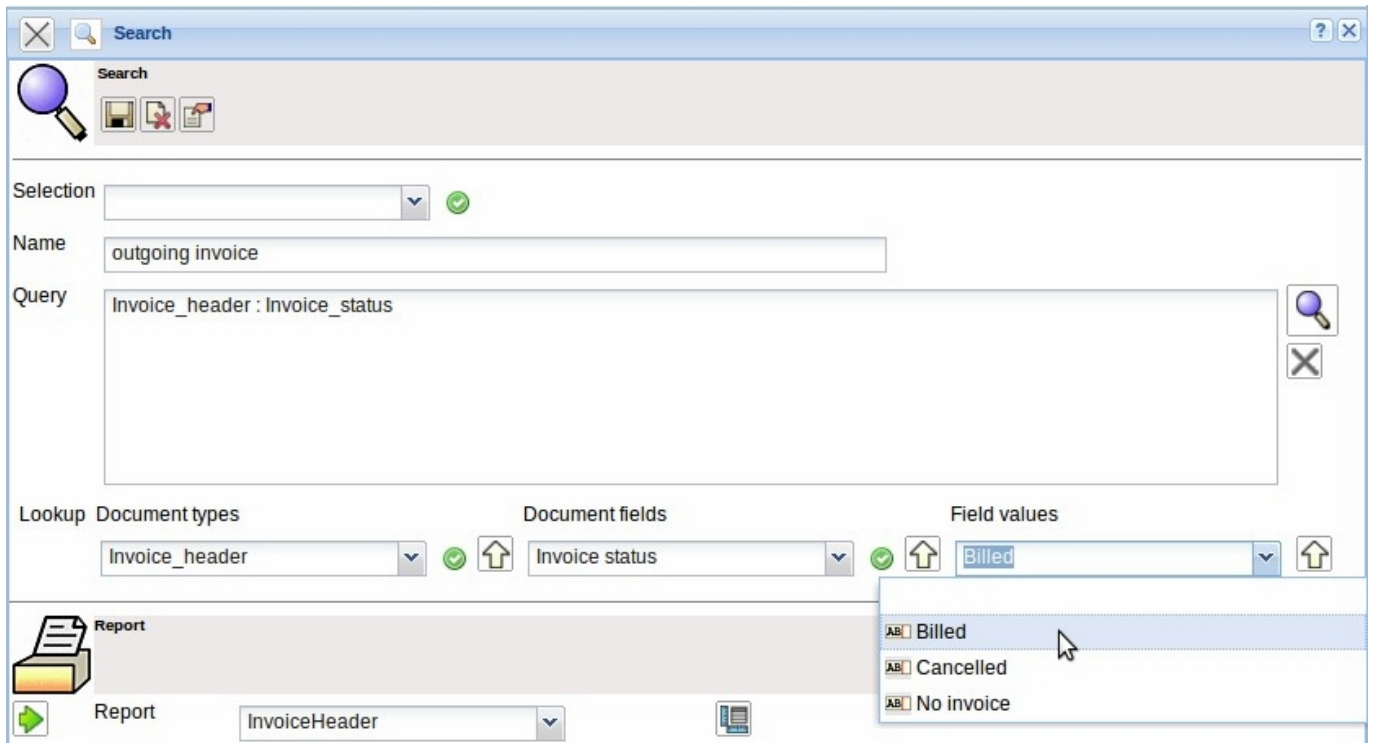
**Invoice:** means that the basis for this search query is the document invoice. Processing this query with Executing this query with  ...



...provides a list of all invoices in the system.

| Invoice Number  | Invoice status |
|-----------------|----------------|
| 1 CS-09-09-1    | No invoice     |
| 2 CS-09-09-2    | Billed         |
| 3 TLC-09-10-5   | Billed         |
| 4 TLC-09-10-4   | No invoice     |
| 5 TLC-09-10-6   | Billed         |
| 6 TLC-09-10-7   | No invoice     |
| 7 TLC-09-10-8   | Cancelled      |
| 8 TLC-09-10-9   | No invoice     |
| 9 TLC-09-10-10  | Billed         |
| 10 TLC-09-10-11 | No invoice     |
| 11 CS-09-10-12  | No invoice     |
| 12 CS-09-11-13  | No invoice     |

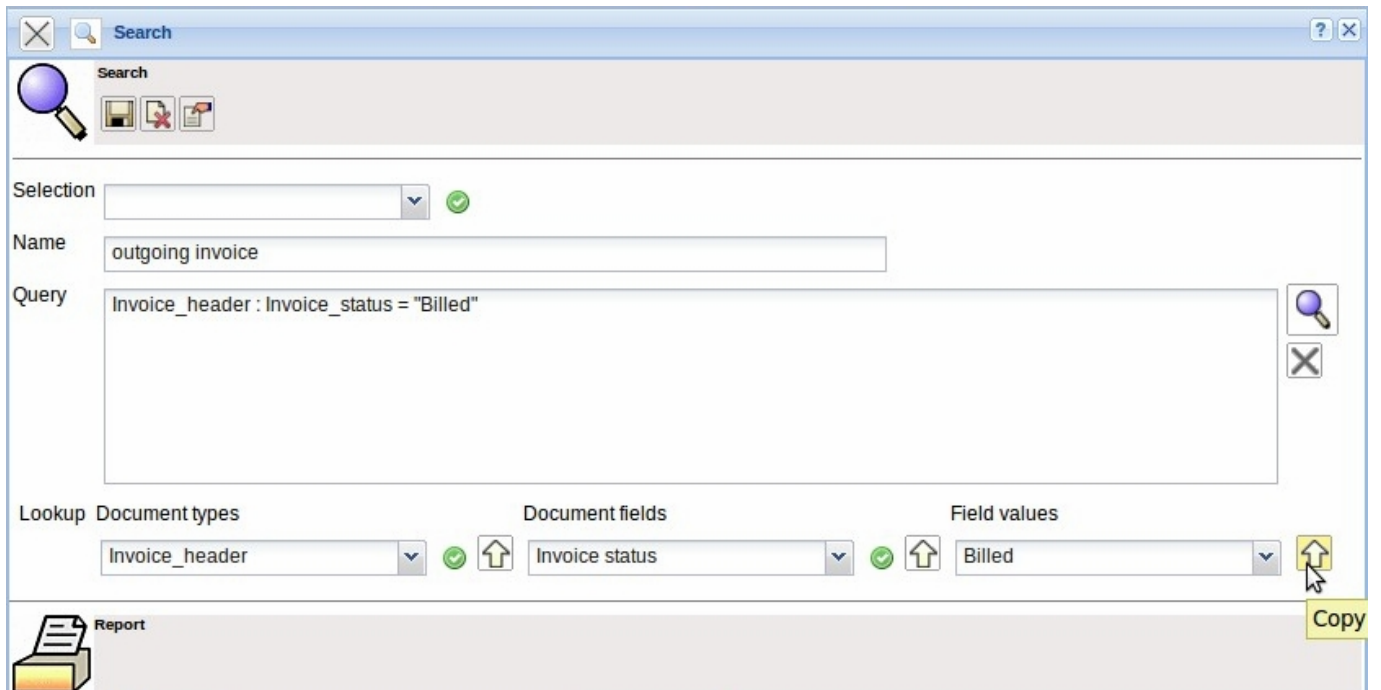
In the next step, the query is defined more specifically. Only billed invoices should be copied. This information is in the document "invoice" and the field has the name "status". By using the assistant, the fields of the selected document can ...



... be looked up. After selecting the status field and the field value, this condition can ...



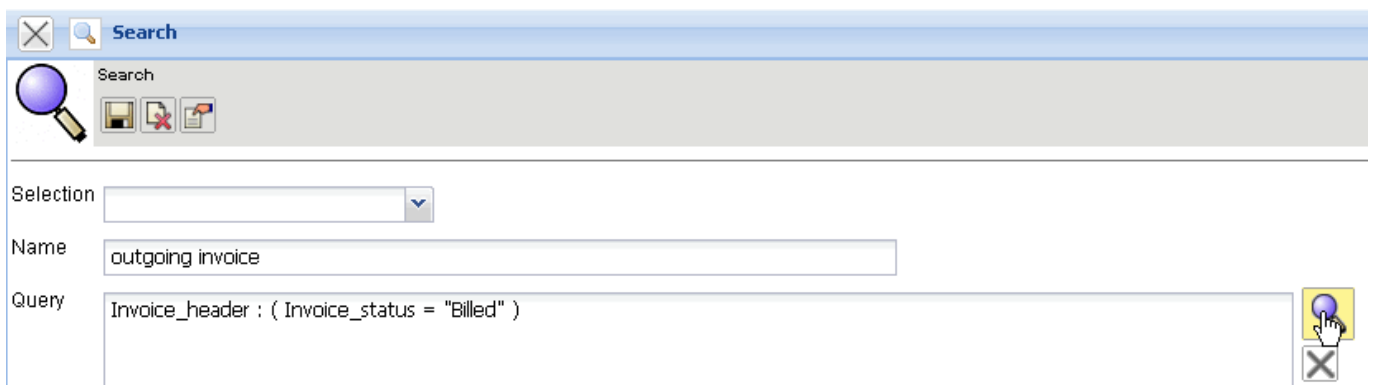
... be accepted with two mouse clicks in the query.



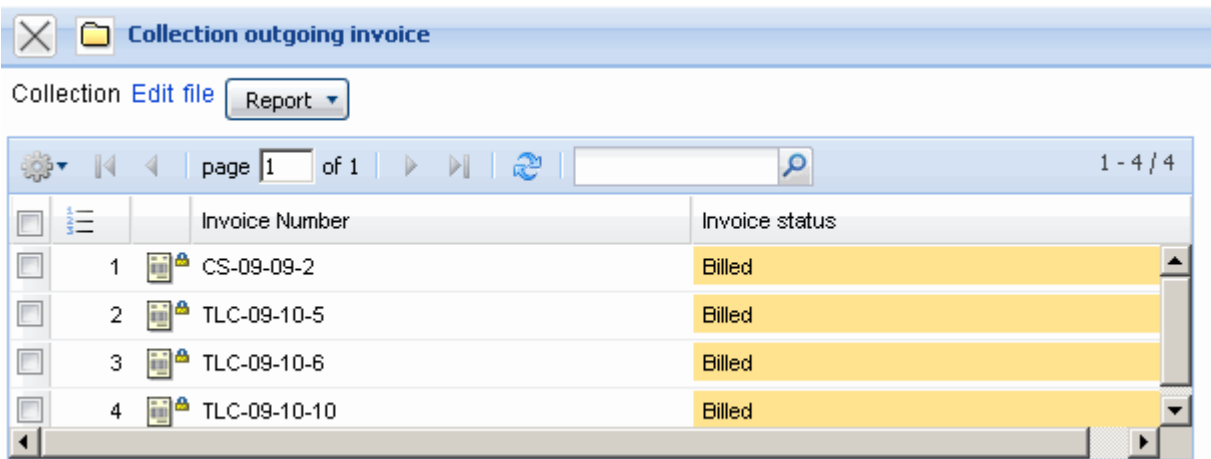
After running the query, the query is reformatted, if necessary. In the example **invoice : status = "invoice billed"** becomes **invoice : (status = "Billed")**. The system normally sets brackets and also automatically transfers collections in the expressions (here billing type). The transformation of the queries must be made by the system because of the internationalization, so the queries can function independently of the user's language.

The Query

**Invoice : (Status = "Billed") ...**



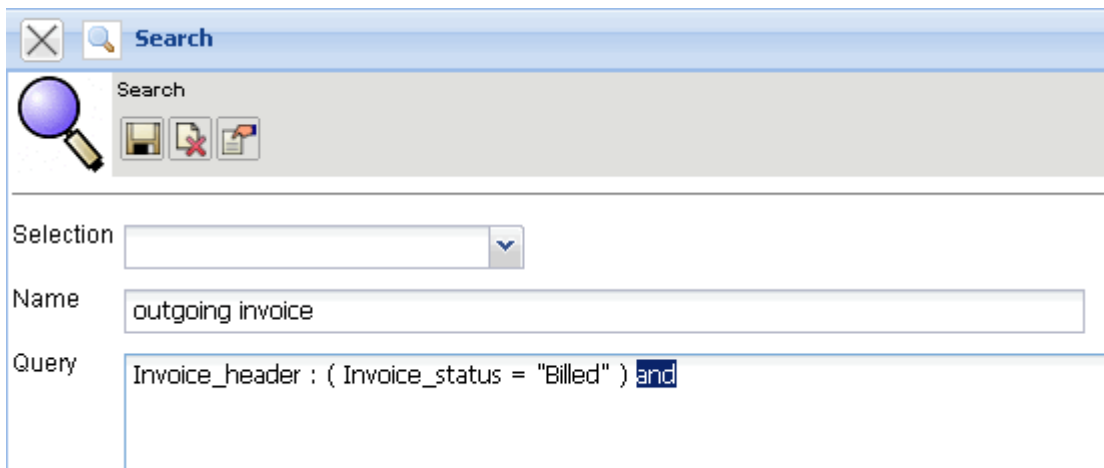
...finds all the invoices that have this field content, therefore which have already been billed.



The screenshot shows a window titled "Collection outgoing invoice". Below the title bar, there are buttons for "Collection", "Edit file", and a "Report" dropdown menu. A navigation bar at the top indicates "page 1 of 1" and "1 - 4 / 4". The main content is a table with two columns: "Invoice Number" and "Invoice status".

|                          | Invoice Number | Invoice status |
|--------------------------|----------------|----------------|
| <input type="checkbox"/> | 1 CS-09-09-2   | Billed         |
| <input type="checkbox"/> | 2 TLC-09-10-5  | Billed         |
| <input type="checkbox"/> | 3 TLC-09-10-6  | Billed         |
| <input type="checkbox"/> | 4 TLC-09-10-10 | Billed         |

In the next step, the created advanced search will be defined more specifically. The invoice date is attached to this query.



The screenshot shows a "Search" window. It has a search icon and a search input field. Below the search field, there are icons for "Selection", "Name", and "Query".

Selection:

Name: outgoing invoice

Query: Invoice\_header : ( Invoice\_status = "Billed" ) and

By using the assistant, the existing query will be extended with an AND-Attachment (both conditions must be met).

Selection

Name

Query  
Invoice\_header: ( Status = "Billed" ) AND Invoice\_date

Lookup Document types Document fields Field values  
Invoice\_header Invoice\_date  Copy

Report

Report

Format

Chart period

Start  End

Period

The second condition filters invoices with the invoice date from a start value (invoice date >= \$Start). In a query, a value can (for example, a date "01.12.2006") be deposited or a variable. In the example, a variable \$Start is used as a placeholder for the invoice date, instead of entering this date directly into the query.

Selection outgoing invoice

Name outgoing invoice

Query  
Invoice\_header : ( ( Invoice\_status = "Billed" ) AND ( Invoice\_date >= \$Start ) )

When using variables, the list of results will not open directly ...

... but only after entering these variables ...

... in an intermediate dialog.



| Invoice Number | Invoice status |
|----------------|----------------|
| 1 TLC-09-10-5  | Billed         |
| 2 TLC-09-10-6  | Billed         |
| 3 TLC-09-10-10 | Billed         |

The Query

**Invoice : ( ( Status = "Billed" ) AND ( Invoice date >= \$Start ) )**

lists all invoices that are billed from the date entered.

Finally, the query is completed by sorting the definition.

Selection: outgoing invoice

Name: outgoing invoice

Query: Invoice\_header : ( ( Invoice\_status = "Billed" ) AND ( Invoice\_date >= \$Start ) ) **SORT** Invoice\_date

Lookup Document types: Invoice\_header

Document fields: Invoice\_date

Field values:

The result list is then no longer sorted according to the internal number, but it is sorted in ascending order by the name. If sorted in descending order, you must use the additional DESC. The search query is then:

**Invoice : ( ( Status = "Billed" ) AND ( Invoice date >= \$Start ) ) SORT Invoice\_date.**

... continued page 2

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