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5.02 Search and Find

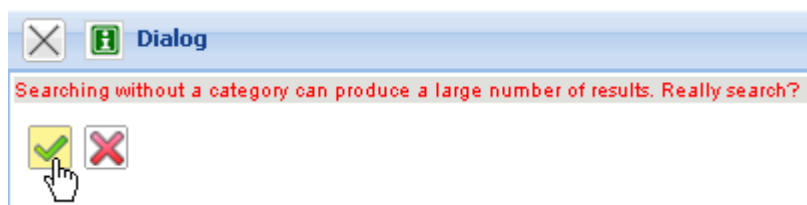
Search Machine

Non-constraining Search

The search machine is used for finding data. Entering a search string in the search box and selecting a category, all documents in the category are searched using the string on the basis of a full text search. Using the category field limits the selectable document types.

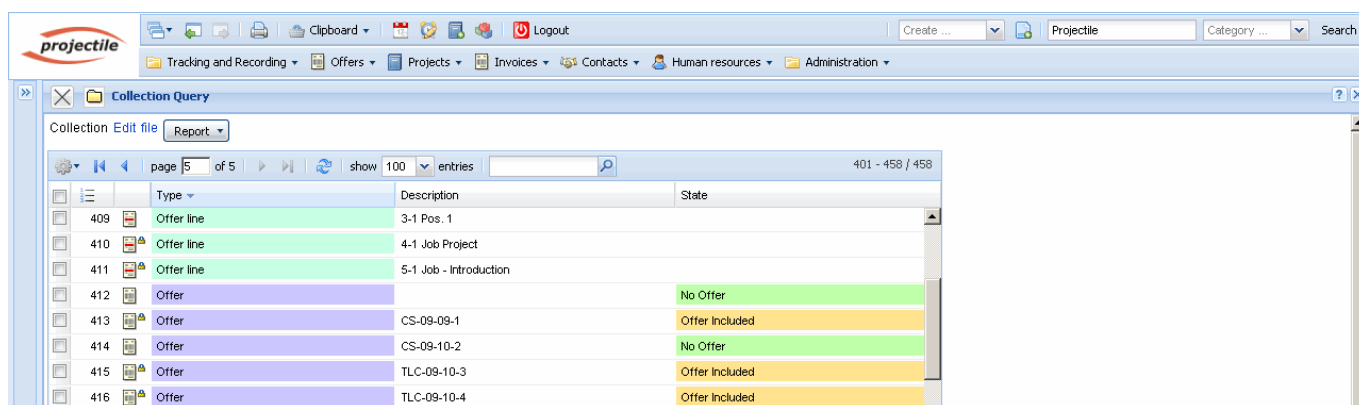


Searching the complete data pool without selecting a category is also possible. Because these searches can take longer, a warning appears when no selection has been found.

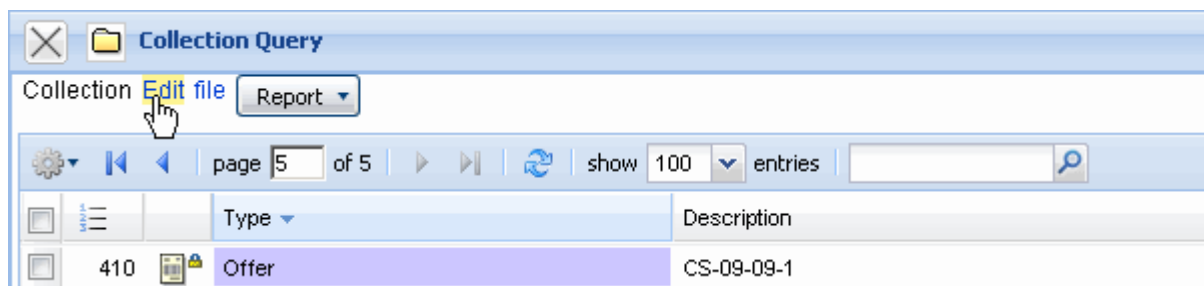


Result List

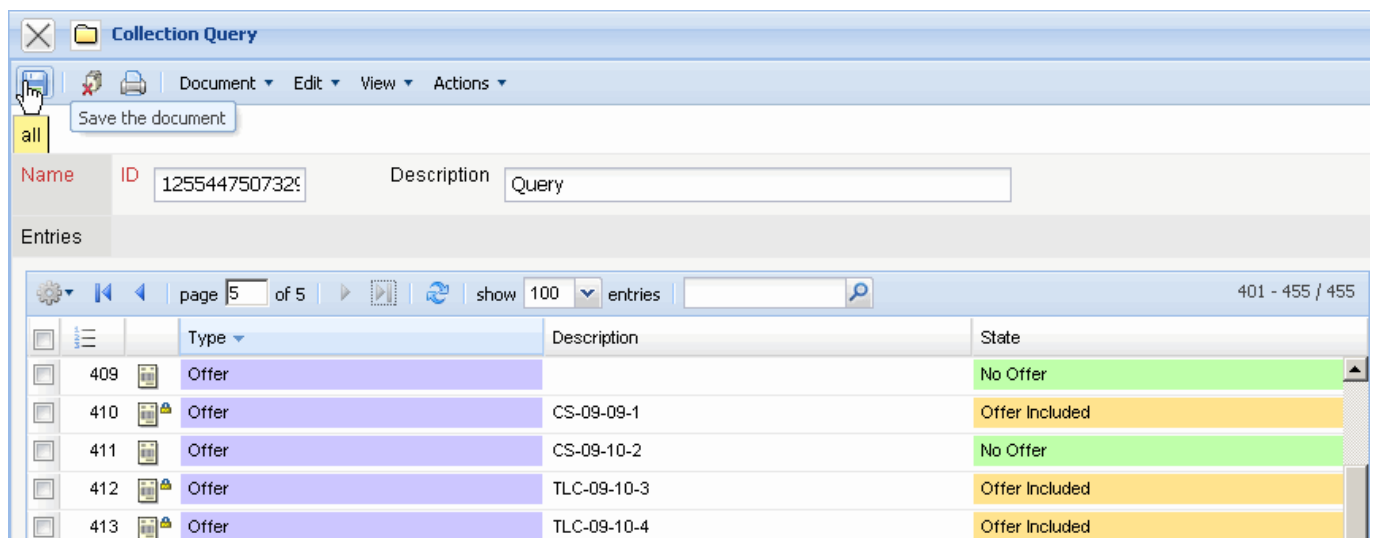
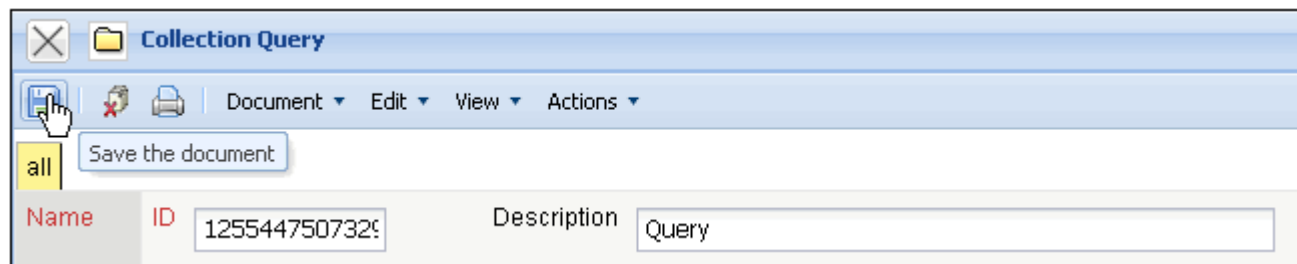
The following illustration shows a possible result list with the search query: In the result list all documents are listed, in which the defined search string "Projectile" has been found.



This result list can also be modified for later usage ...

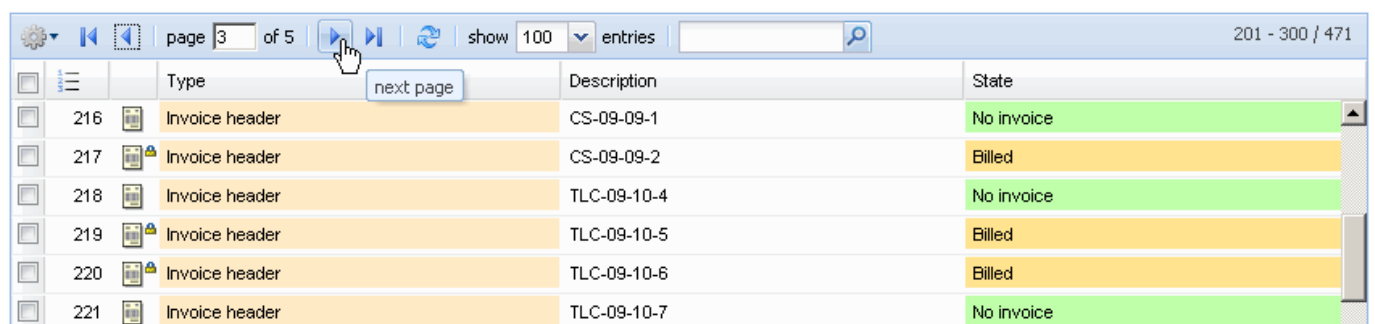


... and saved ("Query Projectile").



In the result set, using the navigation menu pages can be changed to the previous or next page and/or to the first or last page. Here a result list is displayed with 471 entries, in which the first 100 documents are visible.

Change to next page:



to the last page:

page 3 of 5

show 100 entries

201 - 300 / 471

	Type	Description	State
216	Invoice header	CS-09-09-1	No invoice
217	Invoice header	CS-09-09-2	Billed
218	Invoice header	TLC-09-10-4	No invoice
219	Invoice header	TLC-09-10-5	Billed
220	Invoice header	TLC-09-10-6	Billed
221	Invoice header	TLC-09-10-7	No invoice

page 5 of 5

show 100 entries

101 - 200 / 471

	Type	Description	State
143	Project	1 Introduction Projectile 2.5	BeingPlanned
144	Project	1.1 Planning	BeingPlanned
145	Project	1.2 Customizing	BeingPlanned
146	Project	2 Introduction Projectile 2.7	Open
147	Project	2.1 Planning	Open
148	Project	2.2 Customizing	Open
149	Project	3 Introduction Projectile	Active
150	Project	3.1 Introduction Accounting	Active
151	Project	3.1.1 Introduction Accounting	Active
152	Project	4 Customizing crm system	Passive

The amount of displayed results can be set.

page 2 of 5

show 100 entries

101 - 200 / 471

	Type	Description	State
143	Project	1 Introduction Projectile 2.5	BeingPlanned
144	Project	1.1 Planning	BeingPlanned
145	Project	1.2 Customizing	BeingPlanned
146	Project	2 Introduction Projectile 2.7	Open
147	Project	2.1 Planning	Open
148	Project	2.2 Customizing	Open
149	Project	3 Introduction Projectile	Active
150	Project	3.1 Introduction Accounting	Active
151	Project	3.1.1 Introduction Accounting	Active
152	Project	4 Customizing crm system	Passive

page 1 of 3

show 200 entries

1 - 200 / 471

	Type	Description	State
44	Offer	CS-09-09-1	Offer Included
45	Offer	CS-09-10-2	No Offer
46	Offer	TLC-09-10-3	Offer Included
47	Offer	TLC-09-10-4	Offer Included

The columns of the list can be changed and the size can be modified.

page 1 of 2 show 50 entries 1 - 50 / 99			
	Type	Description	State
1	Action	1-1 Williams George Meeting	State
2	Offer	CS-09-09-1	Offer Included
3	Offer	CS-09-10-2	No Offer
4	Offer	TLC-09-10-3	Offer Included
5	Offer	TLC-09-10-4	Offer Included
6	Project timing	3-1 Conception for combining Projectile and SAP O	

page 1 of 2 show 50 entries 1 - 50 / 99			
	Type	Description	State
1	Action	1-1 Williams George Meeting	State
2	Offer	CS-09-09-1	Offer Included
3	Offer	CS-09-10-2	No Offer
4	Offer	TLC-09-10-3	Offer Included
5	Offer	TLC-09-10-4	Offer Included
6	Project timing	3-1 Conception for combining Projectile and SAP O	

page 1 of 2 show 50 entries 1 - 50 / 99			
	Type	State	Description
1	Action		1-1 Williams George Meeting
2	Offer	Offer Included	CS-09-09-1
3	Offer	No Offer	CS-09-10-2
4	Offer	Offer Included	TLC-09-10-3
5	Offer	Offer Included	TLC-09-10-4

Through clicking on a document in the result list, it can be navigated directly to the appropriate document.

page 1 of 1 show 200 entries planning 1 - 23 / 23			
	Type	Description	State
1	Project	1 Introduction Projectile 2.5	BeingPlanned
2	Project	1.1 Planning	BeingPlanned
3	Project	2 Introduction Projectile 2.7	Open
4	Project	2.1 Planning	Open
5	Ticket	New introduction to project planning 02	02
6	Ticket	Problem with splitting jobs in project planning 03	03
7	Project	3 Introduction Projectile	Active

Using the functionality in the window bar, an opened form can be closed again.



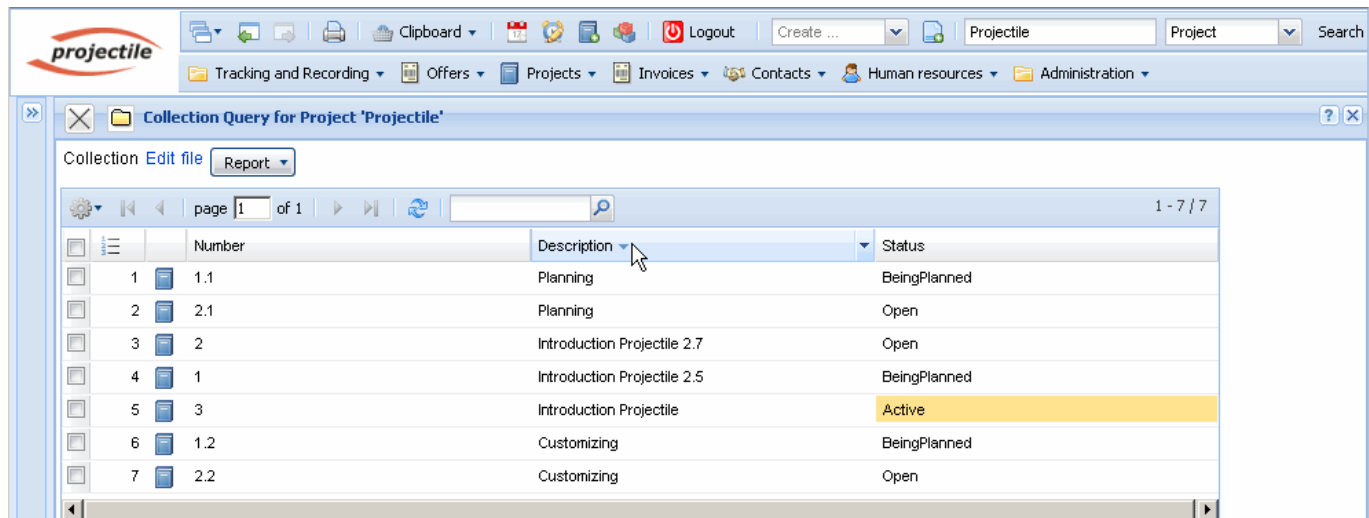
Constrained Search (advisable!)

The second example for using the document search displays the possibility to search for a certain string within a document type (category), which means, further limiting the search: in the example the user would like to list all documents with the top/parent project type where the string "Projectile"

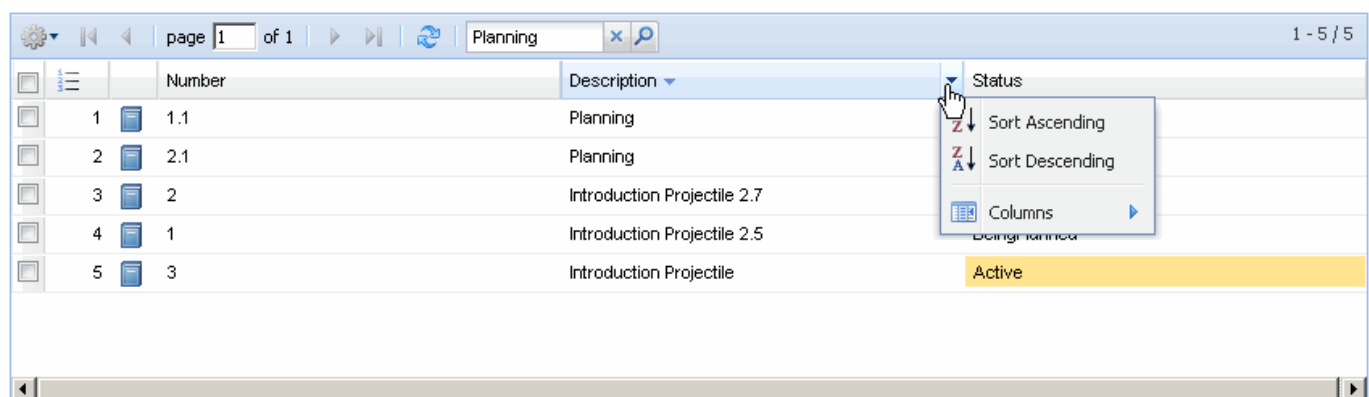
exists ...



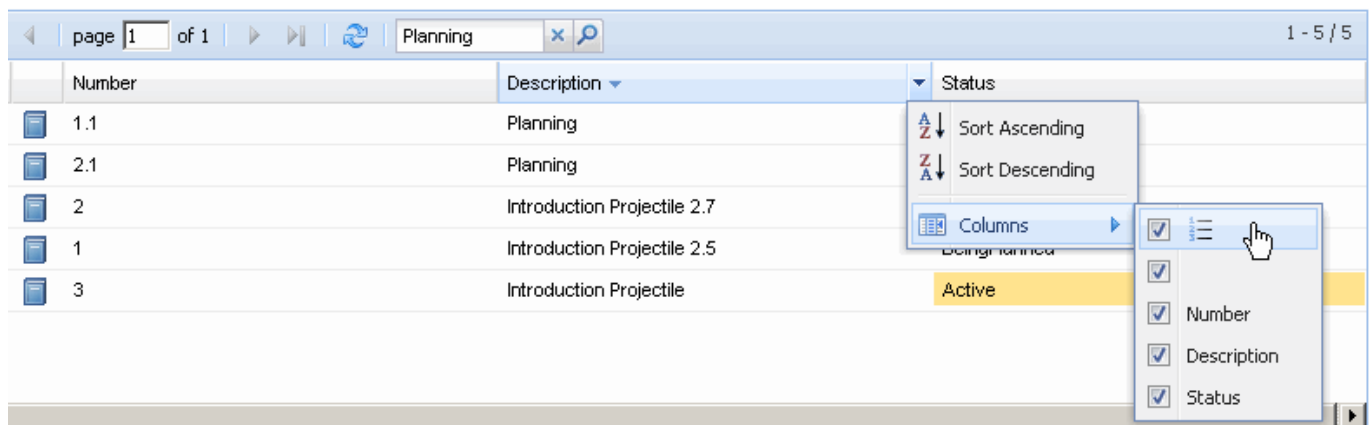
... and in the result list all offers are displayed, which contains the string CS. It makes no difference if this string is in the description or in another element of the document.



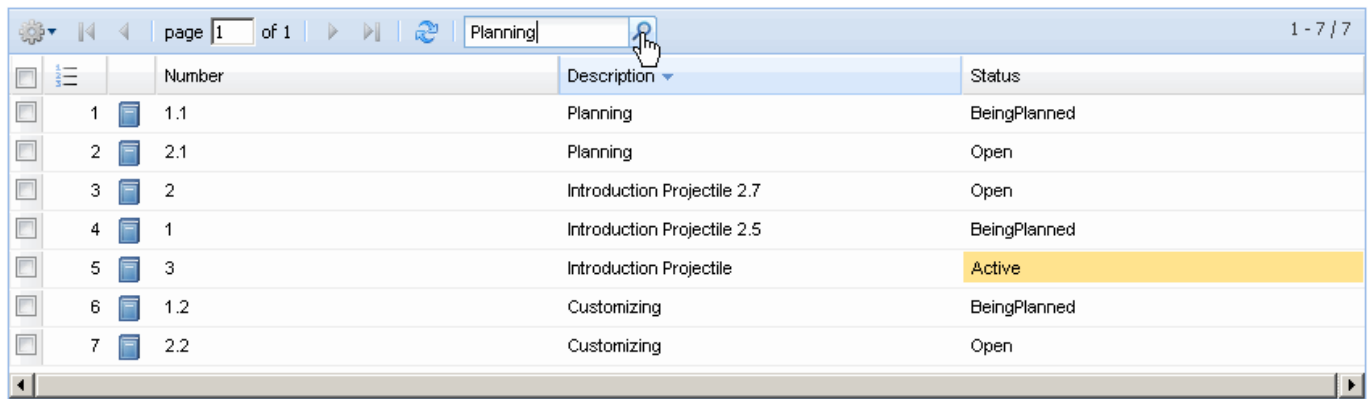
The result list can be sorted...



and columns can be displayed/hidden.

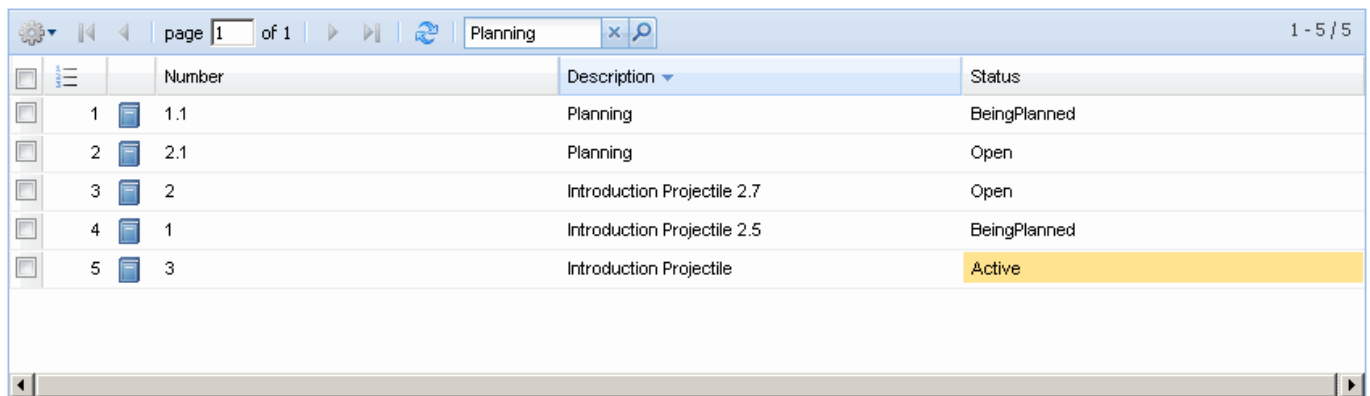


Within the result list the search can be further limited. In the navigation bar a string can be entered in the input field.



	Number	Description	Status
1	1.1	Planning	BeingPlanned
2	2.1	Planning	Open
3	2	Introduction Projectile 2.7	Open
4	1	Introduction Projectile 2.5	BeingPlanned
5	3	Introduction Projectile	Active
6	1.2	Customizing	BeingPlanned
7	2.2	Customizing	Open

After clicking the magnifying glass symbol the system searches within the search list.



	Number	Description	Status
1	1.1	Planning	BeingPlanned
2	2.1	Planning	Open
3	2	Introduction Projectile 2.7	Open
4	1	Introduction Projectile 2.5	BeingPlanned
5	3	Introduction Projectile	Active

Personal Clipboard

The personal clipboard offers a further possibility to find and open a document.

Documents can be transfered to the personal clipboard ...

Project 3 Introduction Projectile

Document Edit View Back references Actions

Master data Copy this document to the clipboard Status Budget Financial data Order data Documentation Misc

Project number Number 3 Status Active

Description Introduction Projectile

Project start/end date From 09.06.2009 To 30.10.2009

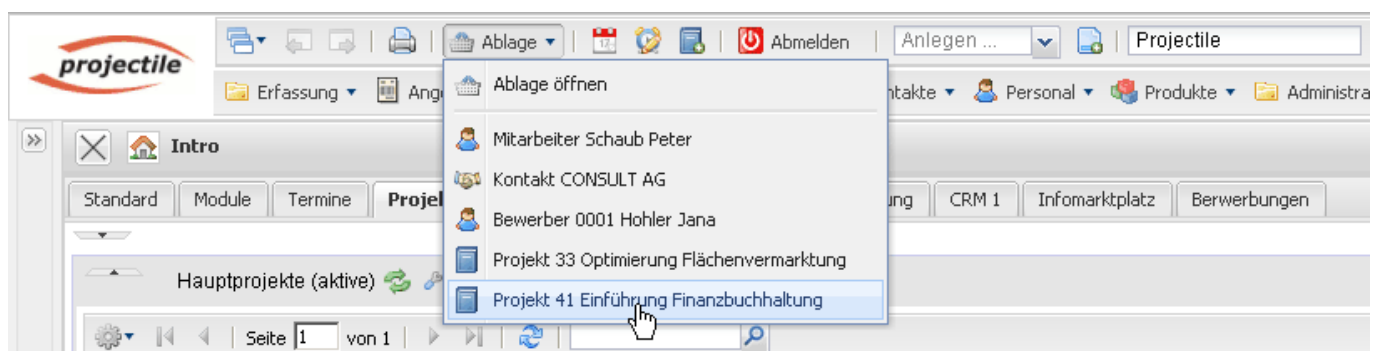
Parent project

Subprojects

page 1 of 1

	Number	Description	Status	Begin planning	End planning
1	3.1	Introduction Accounting	Active	09.06.2009	30.10.2009

and documents can be directly opened with a mouse click on the link from the personal clipboard.



Project 3 Introduction Projectile

Document Edit View Back references Actions

Master data Involved persons Portfolio Status Budget Financial data Order data Documentation Misc

Project number Number 3 Status Active

Description Introduction Projectile

Project start/end date From 09.06.2009 To 30.10.2009

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