

infotips #6

Searching Reports

An often under-utilised, but very important, function in **infore** is the ability to search within reports. If there is specific text that you are looking for in a report, you should not waste time printing the entire report or looking through the report for this information. You should simply search for that text to find it. **Even with very large reports the search capabilities are very fast**

Reports and data within **infore** are viewable in 4 different ways:

- 1) Text-based reports
- 2) PDF documents
- 3) Browser (HTML) documents
- 4) Excel

Let's find out how you can search using each of the different viewers.

1. infore Text Reports

1.1 How Do I Search a Single infore Report?

When displaying a report on the screen, type /. This places you in search mode, then enter the desired text to search for.

For example, if you are searching for the total on the last page of a report and you know the end of the report contains the words "Grand Total" you would type:

/Grand Total <ENTER>

The text when found is highlighted.

	Current	30 Days	60 Days	90 Days	Outstanding	Retention
Grand Total	.00	.00	.00	10314179.6	10314179.6	.00

If more than 1 example of this text occurs and it is not the desired text, type /<ENTER> and **infore** will search again for the last text entered.

If any of your search string is in upper case then the search looks for an exact match including case.

Handy Hint

If your search string is lower case then **infore** will find the string regardless of case.

Example

Data	Search String	Result	Search String	Result
Grand Total	Grand Total	?	grand total	?
GRAND TOTAL	Grand Total	?	grand total	?
grand total	Grand Total	?	grand total	?

A Lateral Thinking Example:

In some businesses, considerable time is spent searching which debtor a cheque belongs to when received via snail mail. The cheque name does not exist in your accounts (because they have a different trading name) and no remittance has been supplied.

The Debtors Detailed Trial Balance {2,B,C} lists each invoice and amount for a debtor, their aged balances and the account balance. Display the Debtors Detailed Trial Balance, then type:

/ <amount> [ENTER]

When searching for amounts, it is recommended to add a space character to each side of the string. This differentiates the amount string from other amounts that contain this string.

Example:

/ 143.15 [ENTER]

then the first occurrence of this amount is found. If not the required account, then type:

/ [ENTER]

the next occurrence will be displayed. Keep repeating the process. This may not work for every cheque received, but it will immediately find if paying a total account, an aged amount or an individual invoice.

In the above example if no space character is around the amount you would also find the other amounts such as (143.15, 21143.156 etc.). By having a leading and trailing space, this will not occur.

Note: The “.” is a special character in the search. It acts as a “wild card” and will match any character. Therefore do not be worried if a search of “6.00” also finds “6000” or “6800”. Just keep searching using the /<ENTER> combination. If this proves to find too many records you can stop the “wild card” feature by escaping the “.” with a backslash “\” i.e. “6\.00” will only find “6.00”.

Other Handy Keys

END	Jump to End of Report
HOME	Jump to Beginning of Report
PAGE DOWN	Display next screen
PAGE UP	Display previous screen

Handy Hint

If you have found a string and then wish to find a different string, unless you have a specific reason for continuing the search from this part in report, it is recommended you press the <HOME> key to reposition at beginning of report and then start the next search.

Searching for text starts from where you are positioned displaying the report to the end of the report. Subsequent searches do not start from the beginning of the report unless you place yourself at the beginning of a report.

1.2 Can I Search Multiple infoware Text Reports at the same time?

You may wish to search multiple reports to find the report that contains the desired text.

For example, you may save all of your free format invoices in the permanent reports area. You wish to reprint an invoice, but you do not know which file it is stored in, as there are multiple invoices in each file.

The following example is to retrieve invoice 123 that was generated sometime during December 07.

Steps are:

1. Return to the menu that the report was generated from (in this example Debtors Free Format Invoice menu).
2. To access the permanent reports area, then:

```
Past Generated Reports                Z
```

```
Enter Menu Option Code.....:      Z
```

This places you in the permanent area

```
Extended Listing? (n).....:      <ENTER>
```

Do not want filename attribute details, if you do then enter “y<ENTER>”

```

1 200704          2 200706          3 200707
4 200708          5 200709          6 200710
7 200711          8 200712          9 200801
10 macro
```

```
Enter File Number, S(earch) or U(p)..:  8 <ENTER>
```

A separate directory is created for files created each month (with some applications this may be different e.g. yearly or all files in 1 directory). In this example it is known that invoice was generated in Dec 07 so enter 8.

You are now placed in this directory

Extended Listing? (n).....: <ENTER>

You do not want filename attribute details

```
1 inv20071203094953      2 inv20071203150638      3 inv20071204101503
4 inv20071211104213      5 inv20071213114926      6 inv20071218110201
7 inv20071219130610      8 inv20071220101210      9 inv20071220101230
10 macro
```

Enter File Number, S(earch) or U(p)..: S <ENTER>

You wish to Search for string

Enter string to search for.....: 123 <ENTER>

```
inv20071213114926:150: 123
inv20071213114926:311: 283-109 HD LUMPS X 820KG @ .15 10.00 123.00
inv20071220101210:22: Auckland 1231
```

Extended Listing? (n).....: <ENTER>

This highlights that the string '123' is found twice in file inv20071213114926 (the invoice number text plus part of extended text for amount 123.00; and in another file the string 1231 is found as a postcode. You therefore require the first file.

Extended Listing? (n).....: <ENTER>

You do not want filename attribute details

```
1 inv20071213114926      2 inv20071220101210
```

Enter File Number, S(earch) or U(p)..: 1

You now have the file that contains the invoice to view/email/print.

To find the actual invoice within the file, use the Search Commands from section 1.1

/ 123 <ENTER>

1.3 How Do I Print Just An Individual Form from file?

Once you have located the file as per the above approach, you can the print, email or fax an individual invoice by the following method:

- 1.3.1 Locate Invoice: example
/ 123 <ENTER> for invoice 123
- 1.3.2 Find the desired form, <page back> to find the Report Splitter form identifier.
e.g. ##IW SECTION## Email=example@ourclient.com.au;id=123
- 1.3.3 q – Quit from displaying report

Q - Quit
1 - Print/Send
2 - Display
3 - Save
4 - Email
5 - Other

X - Exit

1 - To partially send including partially email, select 1

Change parameters as follows:

```
Source File Name.: /zz/ssac/tmp/ssX-1P22-4624
Combined Pr/Fx/Em: Y
```

```
Which Part.....: Specific Form      .
Form Identifier..: 123                  .
                .
                .
                .
```

```
Delivery Method..:
Which Printer....: laser1
Which Fax.....: fax1
Number of Copies.:      1.
```

```
<-- As Per The Form
     Print The Form
     Fax The Form
     Email The Form
```

```
Proceed (Y/N)....: . Yes please!
```

By selecting “Specific Form”, you can enter the specific form identifier. Infoware will work out how many pages it is!

For email and fax, fill in delivery details to send the form.

2. PDF Documents

You can email reports to different users as well as yourself. Reports and forms are emailed as a PDF document and typically viewed through Adobe Viewer. Within Adobe, the following search options exist:

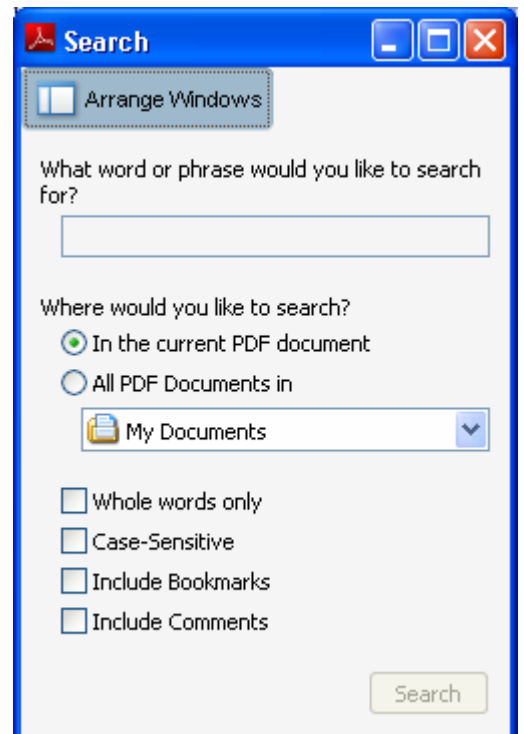


Alternatively press <Shift-Ctrl- F> for Find to search the document for text or simply 'right-click' on the PDF document and the search option is in the popup box.

The 'Find' command is not case sensitive (by default).

Handy Hint

Wide reports are much easier to view as a PDF. It is suggested you email wide reports to yourself for viewing and searching.



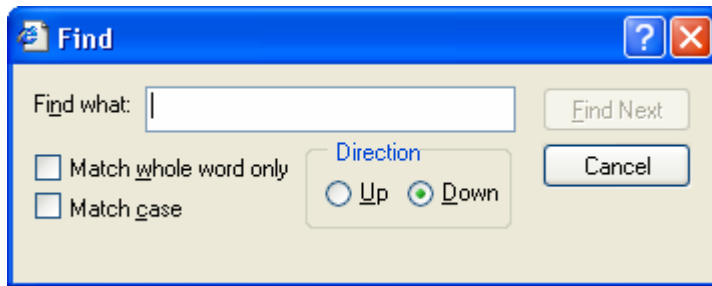
3. Browser (HTML) Pages

infoware's i4 suite of reports (e.g. Debtor Trial Balance, Creditors Trial Balances, P&L's and many other applications) use Internet Explorer as the recommended viewer. i4Query also uses Internet Explorer.

To activate find:

<Control> <F>

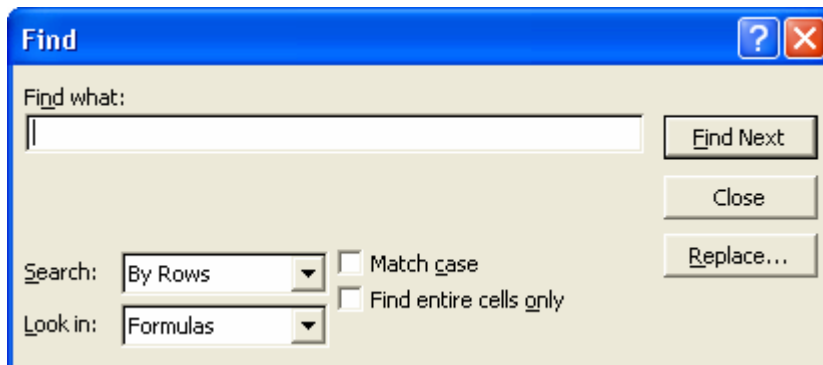
The capabilities of searching using Internet Explorer are as follows:



4. Excel

By using either infoware's i4 Query Plug In within Excel, or selecting i4 Query 'Download to CSV' option, you may view infoware data using Excel. Similar to Internet Explorer, you can activate searching by pressing <CTRL><F>.

The following box will then appear for you to search:



Handy Hint

You can highlight part of Excel's sheet and only this will be searched. Alternatively if none of spreadsheet is highlighted, then all of the spreadsheet will be searched.

--- END OF DOCUMENT ---