

d.velop

d.velop enterprise search: User

Table of Contents

1. d.velop enterprise search	3
1.1. Basic Information on the Application and Manual	3
1.1.1. About d.velop enterprise search	3
1.2. Getting started with enterprise search	3
1.2.1. Searching using a date range	3
1.2.2. Using faceting	4
1.3. Additional Functions and Settings	4
1.3.1. Calling a Search Result in a new Window	4
1.3.2. Displaying search results as a table	4
1.3.3. Starting a Process Based on a Result	5
1.3.4. Manual filtering of the result list	5
1.3.5. Selecting a search template	5
1.4. Tips and Tricks	5
1.4.1. Creating a search template	5
1.4.2. Editing a search template	6
1.4.3. Deleting a search template	6
1.4.4. Customizing the Appearance of the Result List	6
1.4.5. Setting up enterprise search as a search engine in the browser	7
1.5. Frequently Asked Questions	7
1.5.1. How do I group results in the table view?	7
1.5.2. How do I sort results based on multiple properties in the table view?	8
1.5.3. How do I save the order of columns in the table view?	8
1.6. Additional information sources and imprint	8

1. d.velop enterprise search

1.1. Basic Information on the Application and Manual

This chapter contains general product information and conventions regarding product documentation.

1.1.1. About d.velop enterprise search

Nowadays, every employee produces large data quantities in their day-to-day work. This related information often exceeds storage and provider limits.

Employees often spend a lot of time trying to maintain this related data without the proper tools. With d.velop enterprise search, you can query all relevant providers with just one search query. You receive all the information in a single result list.

1.2. Getting started with enterprise search

You can find information across different applications with a single search. This section explains the first steps involved in using the enterprise search.

This is how it works

1. Click **Enterprise search** on the start page.
2. Choose the search providers in which you want to search. Search providers highlighted in blue are searched; search providers highlighted in gray are not searched.
3. Specify the search term in the **Search query** field and press the **ENTER** key or click the magnifying glass icon.
4. Click a result to call the details.

You have performed your first search.

The result list layout is as follows:

- Icon that represents the mime or object types. For example, you can distinguish between PDF and Word files, e-mails, etc.
- The title of the result.
- In front of the title, you can see the search provider or application that the result comes from.
- After the title, you can see the last processing date.
- Under the title line, you can see a short note that provides a rough overview of the rest of the object's contents.
- The available properties are listed beneath this.

1.2.1. Searching using a date range

You can restrict your search to a specific date range before performing it.

This is how it works

1. Open the **Enterprise search** tile.
2. Click the calendar icon in the search field.
3. Enter a start and end date or select a predefined time period.
The pre-defined time periods are:
 - The last 24 hours
 - The last week
 - The last month
 - The last year

Only objects that were processed in the selected time period are found.

4. Perform a search.

You have successfully used the date filter to restrict your search to a specific time period before performing it.

1.2.2. Using faceting

You can further restrict your search results by using faceting. Facet selection depends on the configuration and delivery of the source system.

This is how it works

1. Perform a search.
2. You will find possible facets for further filtering your search results. You can change the search provider independently of the possible property facets.
3. Open a facet.
4. Select a property, or use **Select all** or **Unselect all**. Your selection immediately launches a new search. The search result will continue to apply to the original search term you used.
5. You can choose **Reset** to restore the original state of your search.

You have successfully used faceting to further concentrate your search.

1.3. Additional Functions and Settings

This chapter contains further options for customizing and using the application according to your purposes.

1.3.1. Calling a Search Result in a new Window

You have the option to open the result of a search in a new window.

This is how it works

1. Click **Enterprise search** on the start page.
2. Enter the search term in the Search query field and perform the search.
3. Click in the result list on the three-dot context menu of a result and click **Show results in a new window**.

1.3.2. Displaying search results as a table

You can display the result list in a compact table view.

This is how it works

1. Perform a search.
2. Click



Configure display of results

3. Click



to select the table view.

4. Click **Save** to confirm your selection.

The display of results is now shown as a table. This view lets you work with the result list in the same way as you do with a table.

1.3.3. Starting a Process Based on a Result

You have the option to start a process based on a result. Available processes may be customer specific. Therefore, these instructions are kept general. Apply these instructions to the processes available to you (e.g. creation of a new task).

This is how it works

1. Click **Enterprise search** on the start page.
2. Enter the search term in the **Search query field** and perform the search.
3. Click the three dots next to the desired result and then the available process.

1.3.4. Manual filtering of the result list

You can also filter your results manually without using a preconfigured search template. This section describes how to perform a search with selected search providers. The system remembers the last selection and restores it for your next search.

This is how it works

1. Click **Enterprise search** on the start page.
2. Under the search field, you will find all the available search providers that you can use to perform a search. Choose the search providers you want to use to perform the search. Selected search providers are highlighted and indicated with a checkmark.
3. Perform the search with the selected search providers.

1.3.5. Selecting a search template

You can perform your search faster using saved search templates. Templates contain specific search configurations that allow you to view only search results for selected search providers, for example. Choose search templates that match your activities and make your job easier.

This is how it works

1. Click **Enterprise search** on the start page.
2. Open the management context menu by clicking the filter icon .
3. Choose a search template under **Selected search template**. Your selection is applied immediately. Clicking the search screen closes the context menu.

You have successfully filtered your search results.

1.4. Tips and Tricks

This chapter informs you about additional options the application offers so you can reach your goal faster.

1.4.1. Creating a search template

You have the option of creating search templates. You can create public or personal search templates. Other users can view and use public search templates, but cannot change them. With public search templates, you can also provide role-based preconfigurations.

This is how it works

1. Click **Enterprise search** on the start page.
2. Perform a search with the desired criteria.
3. Click **Add search template** to create a new search template.
4. Give the search template a descriptive name in the **Title** field.

5. Optionally, enable **Release search template for others** if you want to create a public search template. You can see a summary of the selected criteria (search term, search provider, facets or filters).
6. Click **Add** to save the search template.

You have now successfully created a search template. Public search templates are indicated in the list of search templates by the group icon. Personal search templates are indicated by a single person.

1.4.2. Editing a search template

Let's say you want to add a new search provider to a search template that has already been configured or rename the search template. In this case, you can adjust a search template that has already been configured.

This is how it works

1. Click **Enterprise search** on the start page.
2. Open the management context menu by clicking the cog icon.
3. In the context menu, click the cog icon under **Selected search template** to open search template management.
4. In the list, select the search template you want to customize.
5. Customize the search template by changing the name of the search template, sharing the search template or adding/removing search providers, for example.
6. Click **Save**.

You have successfully customized an existing search template.

1.4.3. Deleting a search template

If you no longer require a search template, you can delete it.

This is how it works

1. Click **Enterprise search** on the start page.
2. Open the management context menu by clicking the filter icon

3. Click the cog icon to open search template management.
4. Click the trash can icon next to the search template that you want to delete.
5. Click **Delete**.

You have successfully deleted a search template.

1.4.4. Customizing the Appearance of the Result List

You have the option to customize the appearance of the result list. If you change the appearance of your mobile device on your desktop, the change will only be visible when used with a mobile device.

This is how it works

1. Click **Enterprise search** on the start page.
2. Open the management context menu by clicking the cog icon.
3. Choose **Configure result list**.
4. Click the +character to see more information for a result.
5. Click the -character to see less information for a result.
6. Use the desktop or cell phone icon to define the device for which you want the change to apply.
7. Click **Save** to adopt the setting for the selected device.

Note

Search providers may have different numbers of available properties. Each search provider attempts to provide the configured number of properties, if the search provider has this number of properties. Otherwise, the maximum available number is displayed.

1.4.5. Setting up enterprise search as a search engine in the browser

You have the option of setting up enterprise search as a search engine in your browser. This function allows your browser to open enterprise search directly when you enter your search term in the address field or the search field in your browser.

This is how it works

1. Open the start page.
2. Open this URL: <Your domain>/enterprisesearch/opensearch
3. Your browser recognizes the URL as a search engine.
4. Proceeds as follows, depending on your browser:

Google Chrome

1. Right click in the address bar.
2. Click **Edit search engines**.
3. Click **Add**.
4. Under **Search engine**, enter "d.velop enterprise search".
5. Under **Keyword**, enter "es".
6. Under **URL**, enter "<Your domain>/enterprisesearch/search?q=%s".
7. Click **Add**.
8. Optionally, you can open the context menu and click **Set as default** to configure enterprise search as your default search engine.

Mozilla Firefox

1. Select the search bar next to the address bar.
2. In the search field, a green icon appears next to the magnifying glass. Click the icon and then click **Add d.velop_enterprise search**.
3. Right-click the new icon for enterprise search and click **Set As Default Search Engine**.

Microsoft Edge

1. Click the context menu (three dots) and then **Settings**.
2. Click **View Advanced Settings**.
3. Click **Change search engine**.
4. Click **d.velop enterprise search** and optionally then **Set as default** to configure enterprise search as your default search engine.

You have added enterprise search as a search engine in your browser.

1.5. Frequently Asked Questions

In this section, you can find answers to frequently asked questions about working with d.velop enterprise search.

1.5.1. How do I group results in the table view?

You can group the displayed results by a criterion in the table view.

Let's suppose, you want to get an overview of unpaid invoices per supplier. For example, the name of the supplier is displayed in the **Name** column. You can group the results by the name of the supplier to display all the supplier's invoices under their name.

For grouping, just drag the column and drop it on the **Drag columns here to group the displayed results**.

1.5.2. How do I sort results based on multiple properties in the table view?

The result list is sorted by default. The results are sorted according to the date when an item was last changed and in alphabetical order. You can change the sorting at any time. You will find more criteria under **Sort by**. These criteria are the available properties.

You can also change the alphabetical sorting.

If dossiers are shown in your results, these are always shown at the top position, regardless of which sorting you have chosen.

1.5.3. How do I save the order of columns in the table view?

In the table view, you can move the columns with the properties to different positions to find the essential properties at a glance. The column order is immediately saved for a combination of categories.

Let's suppose you select the category "Delivery note" and the category "Invoice" for your search. You move some columns of the result list to another position in the table view. Next time you perform a search using both categories, the result list is displayed in the last column order selected.

If you did not select any category and perform a search operation, items from different categories may be found. If you change the column order, then the selected column order is only valid for this combination of categories.

1.6. Additional information sources and imprint

If you want to deepen your knowledge of d.velop software, visit the d.velop academy digital learning platform at <https://dvelopacademy.keelelearning.de/>.

Our E-learning modules let you develop a more in-depth knowledge and specialist expertise at your own speed. A huge number of E-learning modules are free for you to access without registering beforehand.

Visit our Knowledge Base on the d.velop service portal. In the Knowledge Base, you can find all our latest solutions, answers to frequently asked questions and how-to topics for specific tasks. You can find the Knowledge Base at the following address: <https://kb.d-velop.de/>

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