

Formularrecherche

Please use the research forms, if you want to search for some custom dialog data.

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Functions



Research on selectable search criteria

All of the following search criteria are logically linked with AND, as they are used.

Research form

Research form input fields	
<i>Timerange</i>	This can be used to pick select from predefined periods. The field values of "From" and "To" be adjusted accordingly to the value, selected here.
<i>Timerange From</i>	The date on which the search results of the search should begin.
<i>Timerange To</i>	The date on which the search results of the search should end.
<i>custom dialogs</i>	In this select box the user can limit the search to a self-defined customdialog. If he wants to cancel this limitation he has to choose „show all forms“.
<i>vehicles</i>	If you want to limit the research to one vehicle, so you can select the vehicle inside these select box. If you want to cancel the single car selection choose "show all vehicles".
<i>drivers</i>	If you want to limit the research to one driver, so you can select the driver inside these select box. If you want to cancel the single driver selection choose "show all drivers".
<i>free search</i>	The free search field an easy to use tool to filter the searched forms. The user can look for any string in every column of a form. You can also combine multiple search terms. After typing a term you have to confirm it with a press on the „Enter“-key. The terms are logical or-connected.

Buttons of the QuickBar:		
	<i>Export</i>	Here you can export all forms as a PDF, Excel or CSV file. All active filters are also used in the exports.

	<i>Create new Quicklink</i>	Create a quicklink for this page.
	<i>open help</i>	Open the help page in the documentation.

Research results

The found data from researching forms are shown in a table. The forms research opens initially with the results of the current month for all vehicles and all drivers. The search can be started by a click on the „search“-button. If you not limited the result to a specific forms type you get all forms which are found for the given search parameters. Every block of a forms type starts with an information row which includes the form name and all entry titles. The following columns are shown always:

<i>date</i>	The Date and Time of the found custom dialog draft dataset.
<i>Vehicle</i>	The vehicle name of the found custom dialog draft dataset.
<i>Driver</i>	The driver name of the found custom dialog draft dataset.
<i>form</i>	The name of the form type in an information row or the order name in a form data row if the form belongs to an order. With a click on the order name you open an dialog box with all order details.
<i>action</i>	In the action column exists a selection menu with different actions for every form.

All other columns are depending to the form field, defined by the associated custom dialog draft.

action column

In the action column exists a selection menu for different actions for every form. By default is „show position on map“ as a shortcut icon on the menu. If the form was sent without coordinates to the portal you get „show this form“ as shortcut.

show position on map

You open a box which shows you the position where the form was sent on a map. You can also read the address here.

show this form

Opens a box where you can see all details of this form. You also get all order details if this form belongs to an order. It's possible to export this detail view as PDF.

Only the data/values inserted to the custom dialog draft form fields are editable, but values of fields with type "signature" are also not changeable.

export form as PDF

It's possible to export all form details you get with „show this form“ as PDF.

edit form

Each researched dataset can be edited by clicking on this option. The name of the form, the send at date, the vehicle and the driver are read-only (not changeable).

delete form

Each researched dataset can be deleted by clicking on this option. After this a security question helps to prevent deleting by mistake. If you deleted a form it is not researchable anymore.

show related order

Like clicking on the order name you can open the order details view by clicking on this menu option.

sorting

You can sort the forms by clicking on the arrows in the table head. By default all forms are sorted descending by date.

multiple form types in the research results

If there are multiple form types in the search result you can only sort by the columns which are same at every draft. A sorting by the entries is not possible. If you try to sort an entry column you get a hint where you can limit the drafts to one type to enable the sorting. In the hint you get a select box of all drafts which are in the research result. With "limit to selection" you limit the result to the selected form type but if you don't want to change you have to click on „cancel“ or the „X“-button.

one form type in the research results

If you have only one draft in your result because of limiting to one type or because of a combination of parameters you can sort the result by every column.

math and statistic functions

Each draft has math and statistic functions. You can use them with a click on the entry name or the graph-icon in each information row. After this it opens a box with some statistical values for the entry column you clicked on. Every entry datatype has other statistical functions and the results include all forms which were found by the user specified search parameters.

date

The view by date values include a maximum and minimum and how many forms of this type have this entry filled.

time

The view by time values include a maximum, minimum and average and how many forms of this type have this entry filled.

integer and float numbers

The view by integer or float number values include a maximum, minimum, total and average and how many forms of this type have this entry filled.

text

The view by text values include how many forms of this type are filled at this entry and how many not.

select box

The view by select box values include how many any option was selected and how many forms of this type are filled at this entry.

yes-no-answer

The view by yes-no-answer values include how many forms of this type exist and how often yes or no was chosen.

signature

The view by signature values include how many forms of this type exist and how often a signature was given and how often not.

create a form out of the portal

Over the research table is a create button on the right side. [blocked URL](#)

With this button you can create a form out of the portal.

At first you have to select a form draft which is used as template. Then you decide the date, time, vehicle and driver the form belongs to and you can insert the data.

settings

In the tab „settings“ you can customize the form research.


common settings

In „common settings“ you can customize the row number of the result table. This influences how many rows are loaded by default after a search.

special functions of single cells

Some entry types are displayed in a special kind and have an additional functionality.

long texts

Long texts are displayed in a short way by default. With a click on the icon  you can display the whole text or shorten it afterwards. The table cell adapts automatically with its size.

signatures

Signatures are displayed in a small and compressed view in the table. To open it in a bigger way you can click on it. This opens a box where you can also export it as a PNG file.