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IQ SEARCHING

P R E F A C E

This is the IQ Searching reference guide for IQ Business & IQ Enterprise software systems.

The document will aid in the understanding and configuration of the IQ Searching for it to function correctly.

Although every effort has been made to keep this IQ Searching document up to date, some of the screen examples may not be 100% the same as the ones reflected in previous versions of IQ Searching. This is due to the continuous development and improvement of the IQ Searching.

Unfortunately, there will be a discrepancy from time to time. We do apologize for the inconvenience that it may cause.

Should you feel that the IQ Searching document is inadequate or requires further explanation or more and better examples, please feel free to email us.

We would love to have some feedback to improve the IQ Searching document in some way or another.

Regards,

IQ Retail (PTY) LTD

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IQ SEARCHING

INTRODUCTION

There are a few methods of searching for data in the IQ Enterprise system: Normal scrolling up and down on the listed information until the correct information is found, typing the name or number of the field where the information is required (this depends on the sort order of the information), filtering, searching for specific information using the search button, wildcard searching and predefined search order.

The more information inputted into the search option, the quicker the user will find the required information.

SCROLL UP / DOWN

The Scrolling up and or down on a grid, allows the user to move the visual portions of a window up, down, left or right. In the IQ system, the user can scroll up and down using the vertical scroll and left and right using the horizontal scroll bar. The user can use the up and down buttons on the keyboard or use the wheel on the mouse. The information listed on the grid, always appear in the primary sort order.

SORT ORDER SEARCHING

The sort order for the information on the grid can be changed by selecting the fields to sort by, under the Sort Order options.



Sort Order

- Code
- Barcode
- Description
- Department
- Supplier Code
- General Code
- Main Supplier
- Alternative Description

The user can also select the F9 function key on the keyboard, to change the sort order and click on the  button, refresh the screen.

The user can find precisely a word/phrase by simply typing it. The system will move the cursor to the line that starts with the first character typed in. Then the cursor is moved to the second character and so on. The result will not list the items not starting with the typed character. As soon as the character typed in the search field is not found, the search field will change to red as a warning. To clear the red warning, press the Esc (Escape key) or backspace and start over.

FILTERS

Using filters correctly in IQ Retail's range of software can significantly increase the performance of the software and open new ways in which to achieve reporting objectives. Simply put, a filter is a tool used to ask the system to provide specific data as required. The types of queries for the system are almost limitless in the sense that if the user has a master file (Stock, debtors, etc.) or transaction file (Stock Transactions, Debtors Transactions) data, the user can create a dataset relevant only to the user, by using the "6 Laws of Filters".

MASTER FILES VS TRANSACTION FILES

Before we start these "Laws of Filters", it is important for the user to understand in what areas of the IQ programs certain information will be found. Almost 100% of queries are either Master file or Transaction file related.

- Master files are the files where static and dynamic information about records that are used in transactions is captured and saved. Without master file information, the user can't have a transaction. An example of such information is the adding of a stock item in the stock file or the adding of a new customer in the Debtors file.

- Transaction files are those files that are updated when a new transaction record is created from your use of systems. An example of such a transaction is an invoice. When an invoice is processed, many files are updated. These include Stock transaction files, Debtors transaction files, General Ledger transaction files and Invoice files to name a few. Point of Sale transactions will also be included under transaction files.

It is important to remember that when a user is filtering data in various parts of the systems, that the differences between these file types are kept in mind. For example, if the user is searching for a specific stock item that was sold on a specific sale, the Transaction file will be used for filtering. Yet if the user wants to search for stock items with specific on-hand levels, a Master file will be used for this filter.

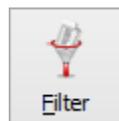
It is quite easy to see the difference between these files in IQ Retail's range of programs, as we like to keep the user interface consistent within the various modules that the user would typically use.

For Master file information, the Maintenance and Enquiry screens would be used. Examples are Stock → Maintenance, Stock Enquiries, Debtors → Maintenance, Debtors → Enquiries, Ledger → Maintenance or Ledger → Enquiries. These menu options contain Master file data.

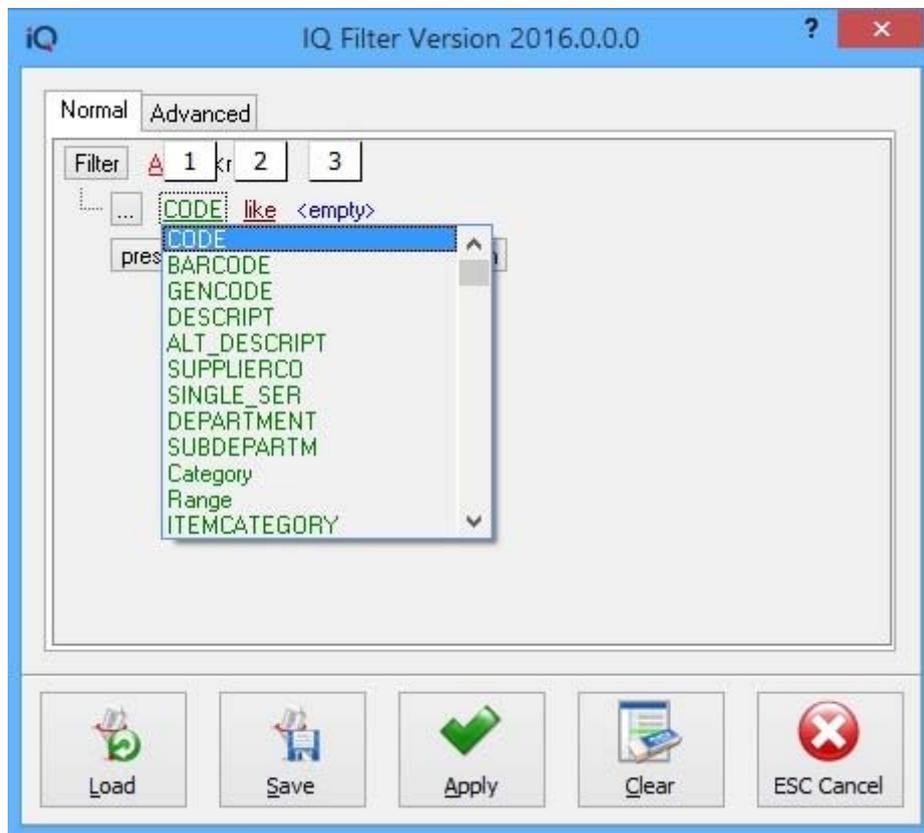
Transaction Files can be found in the areas which will show you actual transactions, these being mainly the Audit Trails. Examples of these are Stock → Reports → Stock Audit Trails, Debtors → Reports → Audit Trails, Ledger → Reports → Audit Tracking. These menu options contain Transaction file data.

ENTER THE FILTER EXPRESSION

We will not mention further differences regarding these types of files for filters within each Law as the structure of the filters remain the same. Only the names of the fields will change, within the respective module for Filter writing.



In all instances when the user selects the filter button, a screen like the following will be displayed:



This screen is divided into sections:

1. Available Fields
2. Logical Operators
3. Defined Filter Expression Area

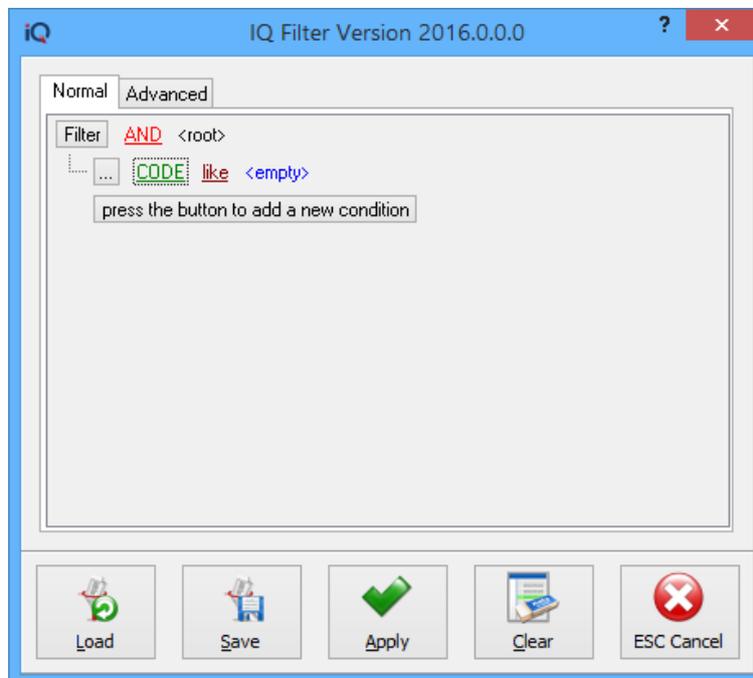
The Defined Filter Expression section, is the area where the entire filter is defined and used by the system's logical engine, to execute the filter and therefore is one of the most critical parts of the filter screen.

THE 6 LAWS OF CREATING FILTERS

The 6 laws of Filters will help to create a dataset that has relevance to the user.

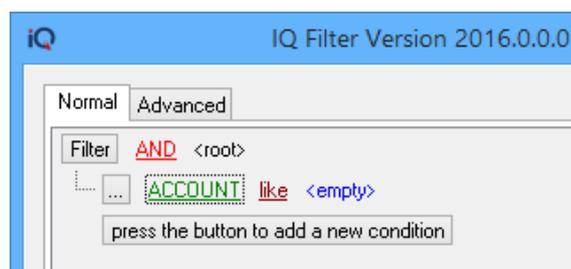
LAW 1: A FILTER MUST START WITH A FIELD

All filters need to have a field in which the user is looking for certain values (text or numerical or date). These fields may only be chosen from the available fields area of the filter screen. They can be chosen by clicking on the existing field (usually displayed in green), a list of available fields will be displayed. Choose the correct field from the list of fields. Before the available field can be selected, click on the "press the button to add a new condition".

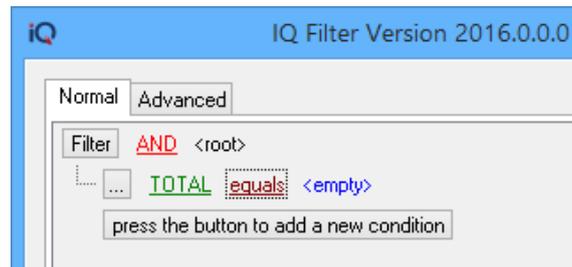
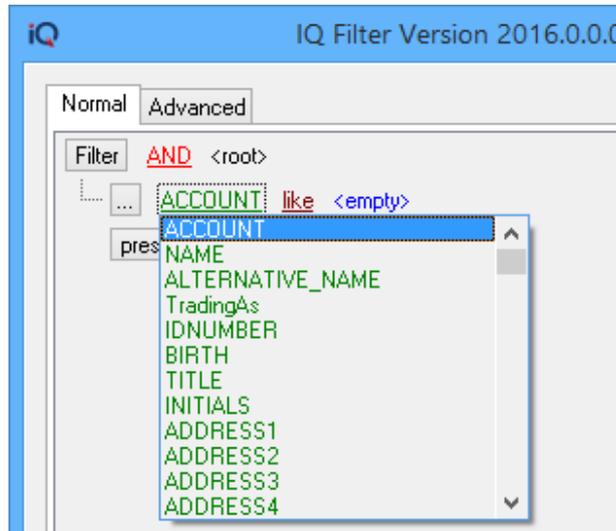


Once the button has been pressed, the field selection will be available.

NOTE: Calculated fields do not appear in the Filter option.

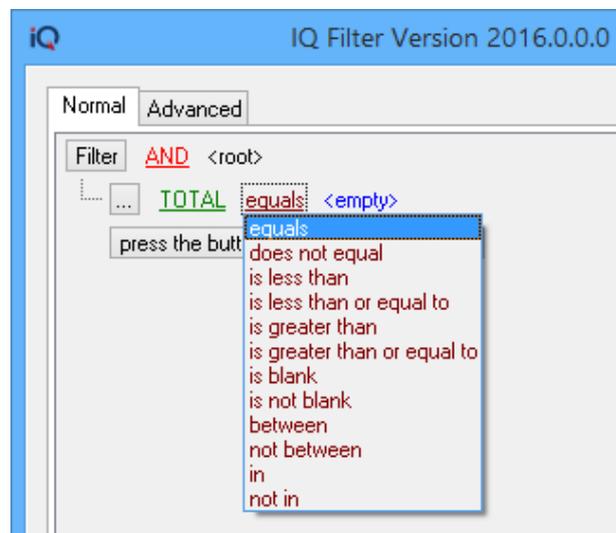


Click on the Green Account field, to choose from the list of fields available.



LAW 2: THE FILTER MUST HAVE A RELATIONAL OPERATOR

All filters must have a relational operator directly after the field the user has chosen. The 'Relational Operator' is the mathematical symbol that the user will use to assign a value to the field on which the filter is being run.



LAW 3: THE FILTER MUST HAVE A VALUE AFTER THE 'RELATIONAL OPERATOR'

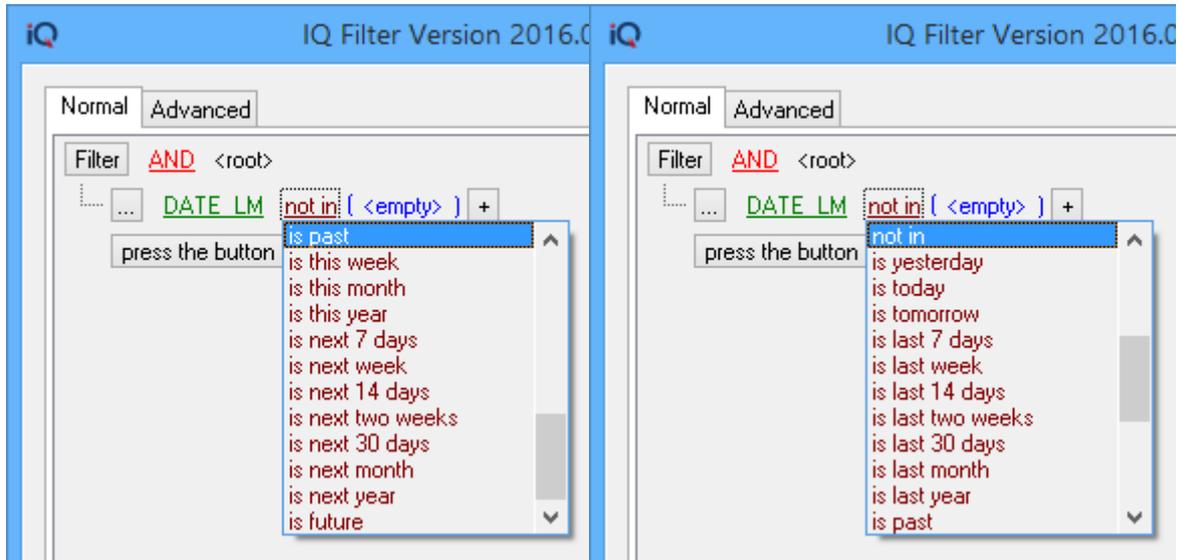
The value that is given after the relational operator, is the value which the user is looking for. This value must be typed into the expression area, as there are no means of finding that value in the filter screen. It is therefore, understood to be a 'user defined' value.

NOTE: The filter options are case-sensitive, meaning that if the description was captured as capital letters, the filter option must be entered as capital letters.

The user now has a working filter based on the first 3 laws. This filter can be executed by clicking on the 'Apply' button and should run correctly.

When selecting a date field as a value after the relational operator, there are a few additional options that become available. The normal options for a filter are these options in the selection box in the screen as seen on the previous page.

The additional options that appear for date fields are:



Some useful date fields to make use of when applying filters on stock maintenance or enquiries:

DATE_LM

This field records the last transaction done on this stock item. It is updated by ALL stock transaction types, including adjustments and transfers.

DATE_LS

This field records the last INVOICE or CREDIT NOTE transaction done on this stock item.

DATE_LP

This field records the last GRV or RETURN transaction done on this stock item.

DATE_LT

This field records the last TRANSFER-IN or TRANSFER-OUT transaction done on this stock item.

LASTSTOCKTAKE

This field records the last date that this item was counted via either the batch stock take program or the wireless stock take program.

USE OF WILDCARDS

When setting up filters on text fields, the two prevalent functions are LIKE or NOT LIKE.

- Use a wildcard % before and after the required search string and all items containing the search string will be shown.



- Use a wildcard % before the required search string and all items ending in the search string will be shown.

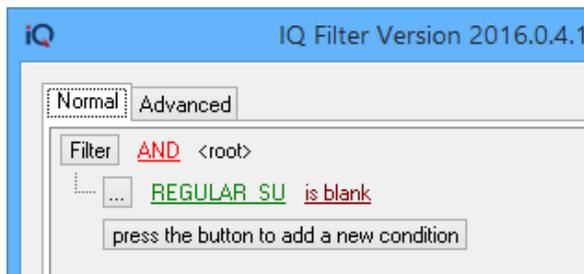


- Use a wildcard % behind (after) the search string and all items starting with the search string will be shown.

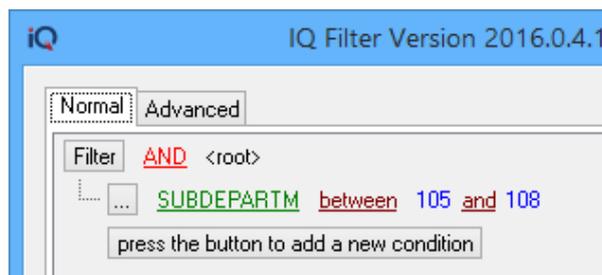


IMPORTANT: Text searches are case sensitive.

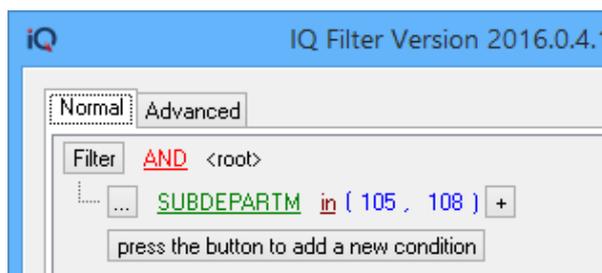
Filters can also show where some fields are missing data.



Filters can be used to select a range of data.



Filters can be used to select data from a specific set, that is not in a continuous range.



For each of these filter types, by using the corresponding NOT function, you will receive the converse set of data as the result.

Examples of filters are:

Account **equal** ACT001

Total **does not equal** 0

Total **Is less than** 1500

Total **Is greater than** 1500

Total **Is greater than or equal** to 1500

Account **like** ACT001

Account **like** ACT%

Account **not like** ACT001

Total **Is blank**

Total **Is not blank**

Txdate **between** 06/10/2016 **and** 10/10/2016

Txdate **not between** 06/10/2016 **and** 10/10/2016

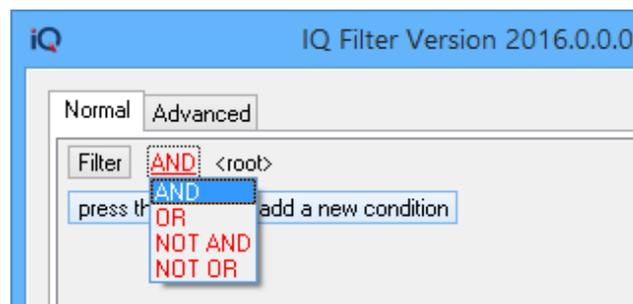
TCode **In** IN + CN

TCode **Not In** IN + CN

The laws that follow are somewhat more advanced.

LAW 4: COMPOUND FILTERS ALWAYS NEED A 'LOGICAL OPERATOR'

A 'Compound filter' is a filter that uses multiple fields to arrive at a certain filtered data set. A 'Logical Operator' is the operator that allows the user to join two filters that will then create a single set of filtered data. These operators include: **AND**, **OR**, **NOT AND** and **NOT OR**.



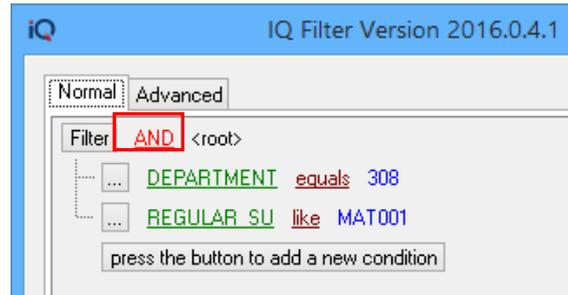
The logical operator is used after the first complete filter is written and is much like using a sentence in any language that allows the user to define multiple criteria for searching. An example of this would be 'drive to the intersection AND turn left'. If this sentence is split into filters, the user should drive to the 'intersection' being the first filter and 'turn left' as the second filter. From this, the user can gauge that a 'filter' is a type of instruction that is given. The two filters are held together by the logical operator 'AND'.

By using **AND** in the filter, you create a filter where each expression must be met before the item is included in the resulting data.

By using **OR** in the filter, then either of the expressions can be true, for the item to be included in the resulting data.

EXAMPLE USING AND

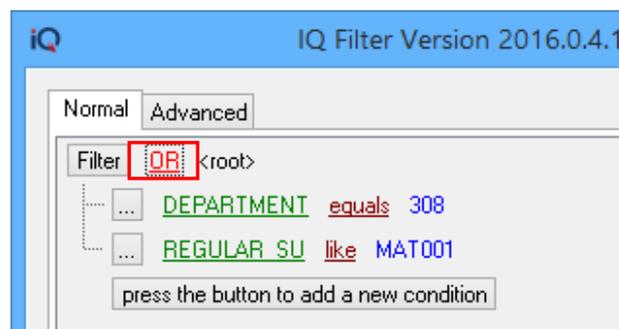
(DEPARTMENT = '308') AND (REGULAR_SU = 'MAT001')



This will return all items that are both in department 308 and have MAT001 as the regular supplier. (Both expressions need to be true.)

EXAMPLE USING OR

(DEPARTMENT = '308') or (REGULAR_SU = 'MAT001')



This will return all items that are either in department 308 or have MAT001 as the regular supplier. (Either of the expressions need to be true.)

LAW 5: AFTER STARTING A COMPOUND FILTER THE PROCESS REVERT TO LAW 1

After a logical operator, has been used to join two filter operations, the user needs to revert to Law 1 and follow the same procedure that created the first part of the filter up until Law 3. It is important to note that when creating a compound filter, the meaning of the operators (AND, OR, NOT) have the same meaning as the word would ordinarily have in the English language.

TXDATE EQUAL 06/10/2016 AND TCODE EQUAL IN

This filter will set about searching for data records that have both of these criteria in the fields stipulated i.e. the transaction date is 10th June 2016 and the transaction that took place was an invoice. If any records do not meet both these criteria, then the record will not show in the filtered data set. This filter would have been written in the Stock → Reports → Stock Audit Trails.

BALANCE DOES NO EQUAL 0 AND GROUP EQUAL 001

This filter is written in any area that has the debtors master file as a dataset e.g. Debtors → Enquiries, Debtors → Reports → Debtors → Statements or Debtors → Reports → Age Analysis. Once run, this filter will only show debtors with balances that are not equal to zero and belong to the debtors group '1'. If a record doesn't match these criteria, it will not be shown.

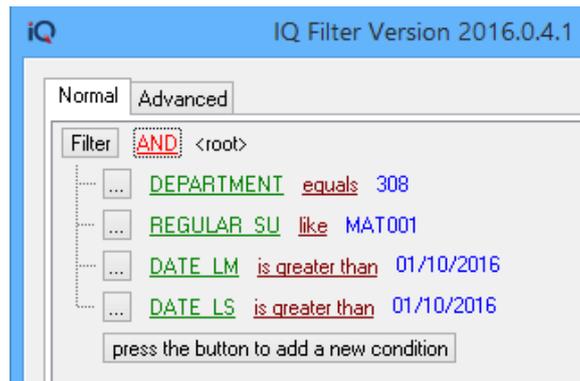
(CODE IN (IN + CN)) AND (ACCOUNT EQUAL ACT001)

This is a compound filter with more than one logical operator. Both the 'AND' and 'OR' operators have been used. This filter is run in Debtors → Reports → Audit Tracking. The filter will display all transactions that are invoice or credit notes where that debtor's account is ACT001. Notice that brackets have been used to group this mathematical function so that the invoice and credit notes section of the filter understand that the records match either an invoice or credit note, but that the value of the account number is 'absolutely' stated as ACT001 for any of these types of transactions.

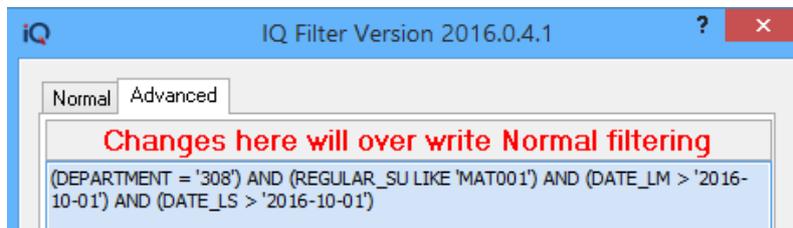
Compound filters are also known as Advanced filters. Advanced filters allow the user to set search criteria for each field, as well as compare fields against each other.

More examples of advanced Filters

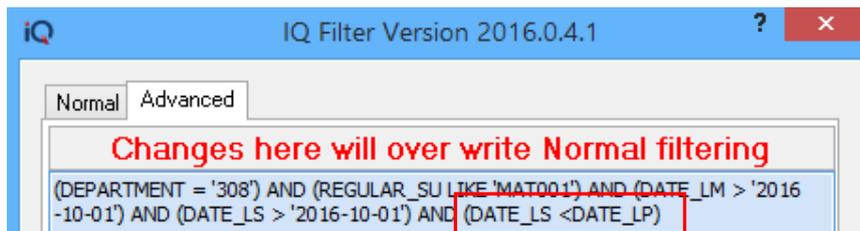
Normal Filter



The same filter in Advanced View



Advanced View to compare two Date Fields



LAW 6: IF YOU MAKE MISTAKES IN A FILTER YOU CANNOT BREAK ANYTHING SO TRY AGAIN
 This Law is self-explanatory.

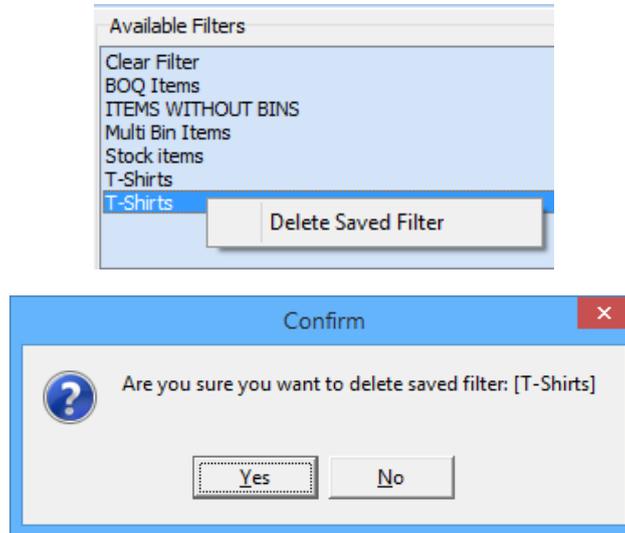
BUTTON FUNCTIONALITY



LOAD	The load batch option allows the user to load any filter that has been saved.
SAVE	The save option allows the user to save any filter. This option is very useful if the user needs to save a filter, that will be re-used on a regular basis. In other words, a template of the transactions is saved, which can be used over and over.
APPLY	Select the Apply option for the filter to take effect.
CLEAR	The Clear selection option will clear the filters.
ESC CANCEL	The Esc / Cancel option allows the user to discard any of the changes or configurations made.

DELETE A SAVED FILTER

Find the filter that needs to be deleted in the Available Filters list at the top right hand corner of the screen. Click on the selected filter and right click on the mouse. Confirm if this is the correct filter to be deleted and click on the "Delete Saved Filter" option. The user is prompted again to ensure the filter can be deleted.



NOTE: Remember that if the filters are setup to centralise in the Company Details → Enterprise Settings and a filter is deleted, the filter will be deleted from all the companies that are centralised.

WILDCARD SEARCHING

WHAT IS WILDCARD SEARCHING?

Wildcard Searching is based on character pattern matching between the characters specified in a query and words in documents that contain those character patterns. Wildcard Searches are used to find several characters (text or numeric values). It is often used to search for specific data, where the full name or word or code is not known.

Wildcard Searching is used for searching for partially known data in text values or numeric values. Wildcard Searching is handy for locating multiple items with similar, but not identical data.

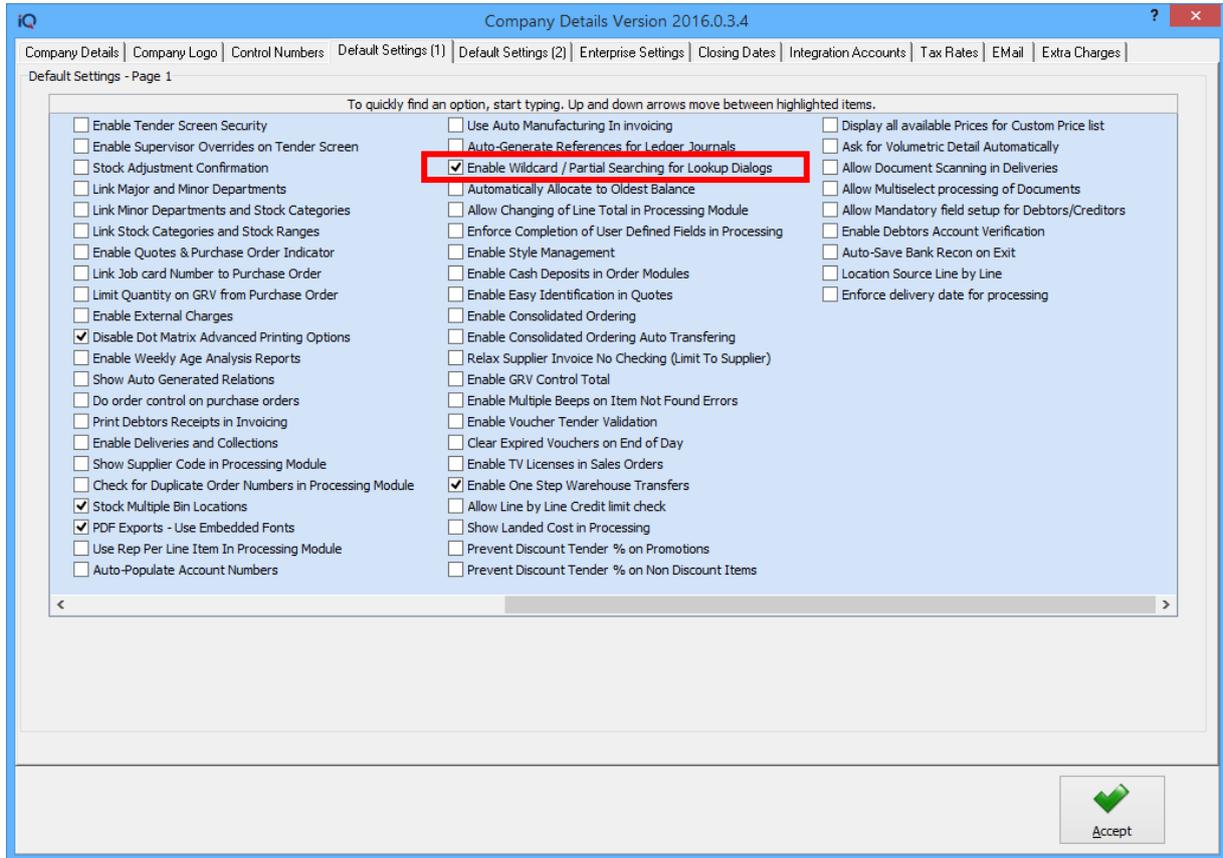
Wildcard Searching in IQ works like the LIKE statement in SQL searches and in filtering.

Wildcard Searching in IQ allows the user to build a refined search for data. For example, the user can search for all the statements where the word "PEN" forms part of the description. The result will provide a list of all the descriptions with the word or part of a word "PEN" in it. Then the user can refine the search by adding the word "Rollerball". The result would be all the descriptions with the words "Pen" and "Rollerball" in it. Another search can be added to search for all the "Blue Rollerball Pens". The user can go back on the search and search for all the "Red Rollerball Pens".

Wildcard Searching allows the user to search for data in different columns on a data grid. The user for example remembers that the item code starts with Pen, and is in department 002 and is sold by supplier 321. Start by searching for all the item codes starting with PEN, then add department 002 and then main supplier 321. This will narrow the search down to a few items, which allows the user to select the correct item.

SETUP

From IQ, main menu → Utilities → Setup → Company Details → Default Settings (1) → search for “Enable Wildcard / Partial Searching for Lookup Dialogs”. Tick this option to enable IQ Lookup dialogs to support partial matching on data, in most of the forms with a search bar. Click on Accept to save the changes made.



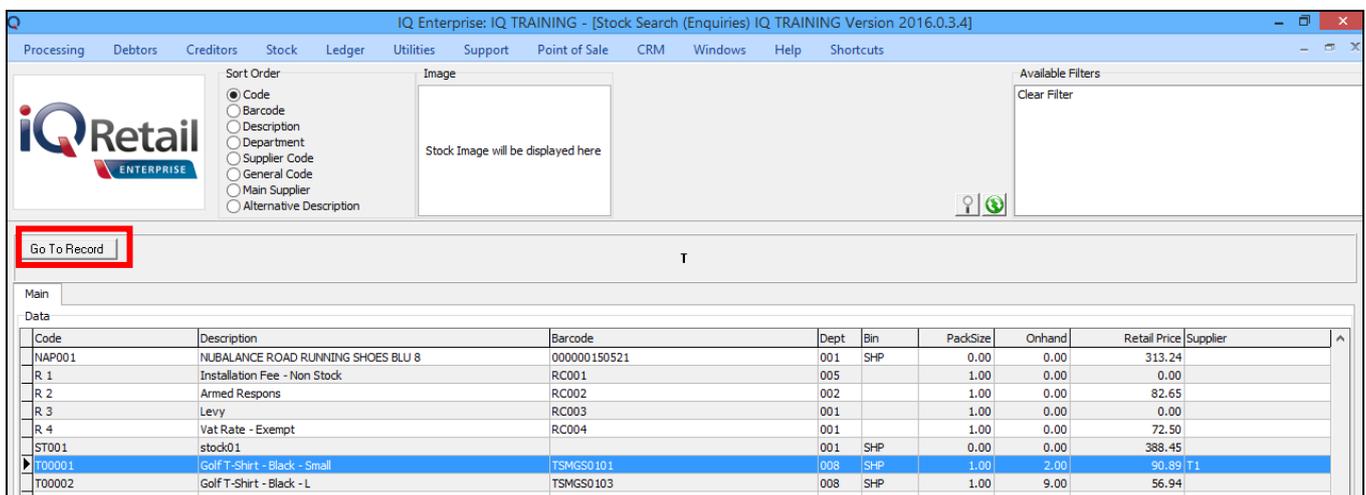
FUNCTIONALITY

EXAMPLE:

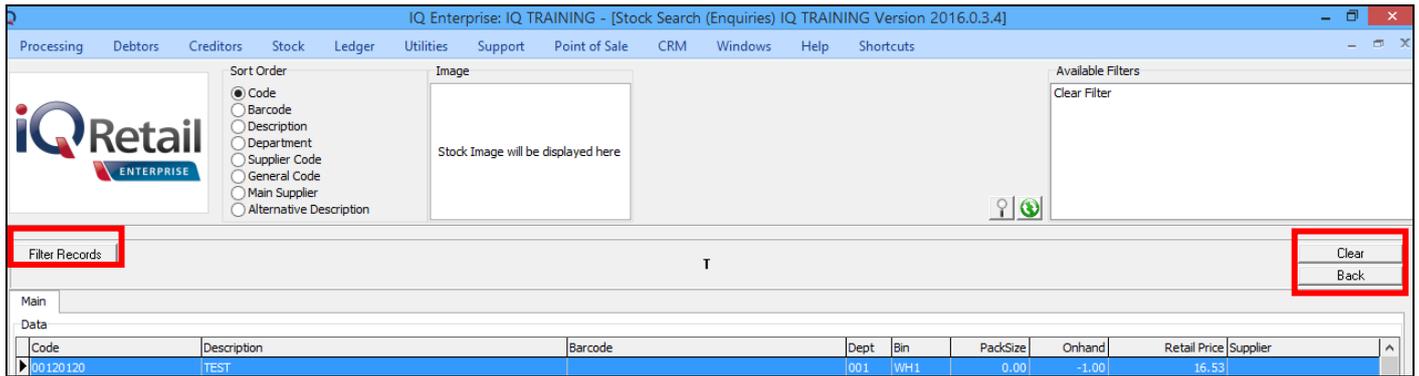
The user is searching for specific stock items: from IQ, main menu → Stock → Enquiries.

Start typing a character to search for: example T.

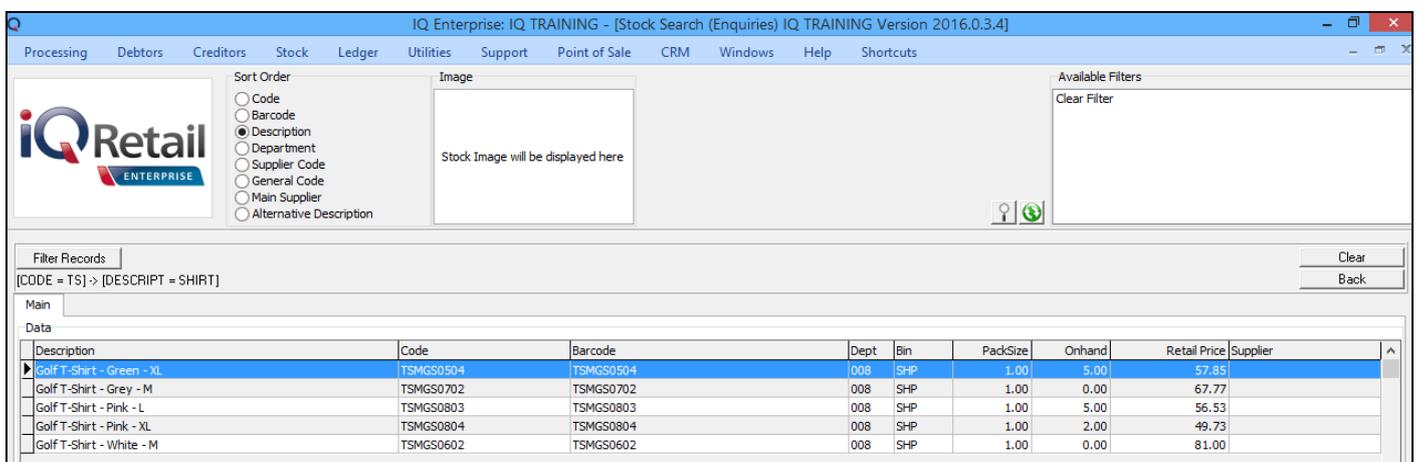
Once a character is entered, the “Go to Record” button appears in the band above the Stock list. This will go to the first item where the item code starts with the selected letter.



If the user want to use the partial filtering, click on the "Go to Record" button and it will switch automatically to "Filter Record". Two new buttons will appear "Clear" and "Back".

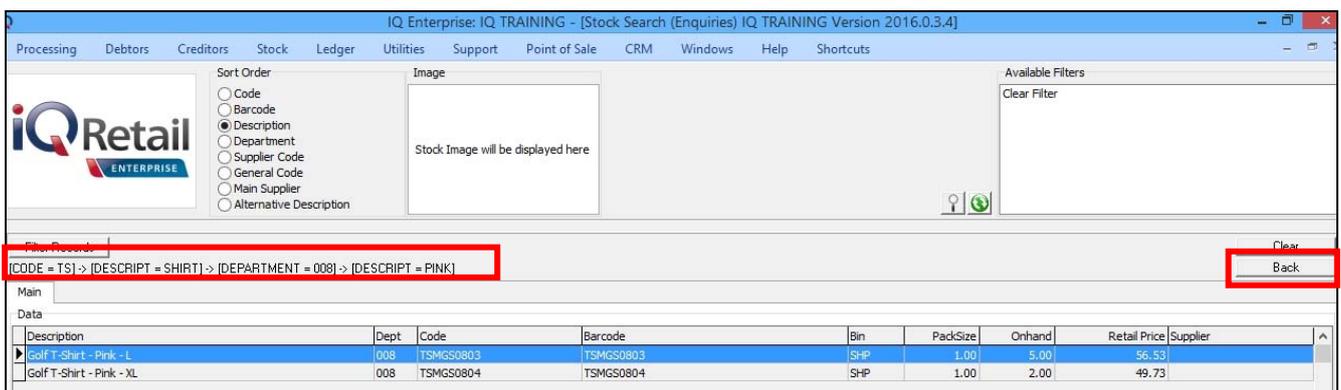


The user can type in the desired characters and when the user press the Enter button on the keyboard, the table list will update with the filter which was inserted.



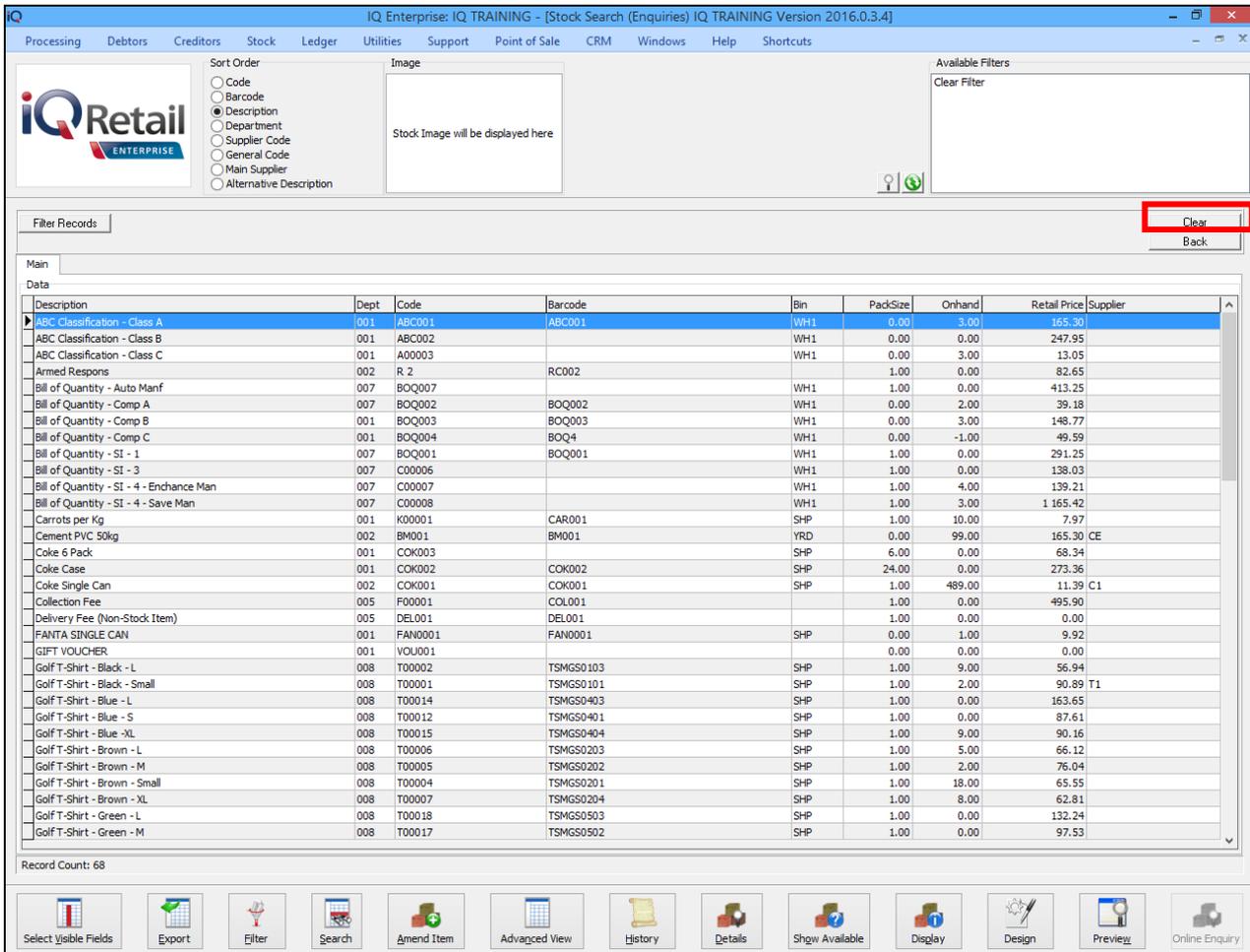
Click on the Sort Order to change the fields where the filter should be applied. For example, sort order = code (will search for all the items with the value "TS" as part of the code. Press the Enter key.

Click then on the Sort Order for Description and enter the next filter option. Press the Enter key. Click the on the Sort Order Department and enter the next filter option, press the Enter key and so forth.



The search pattern is displayed at the top of the grid.

The Back button will see the search pattern and step back one search, to the previous filtered values.



When the “Clear” button is selected, the search pattern used previously is removed and a complete new search or filter option can be entered.

The Wildcard / Partial Search functions is mostly used in the stock modules, but can be used in all the

PREDEFINED SEARCH ORDER

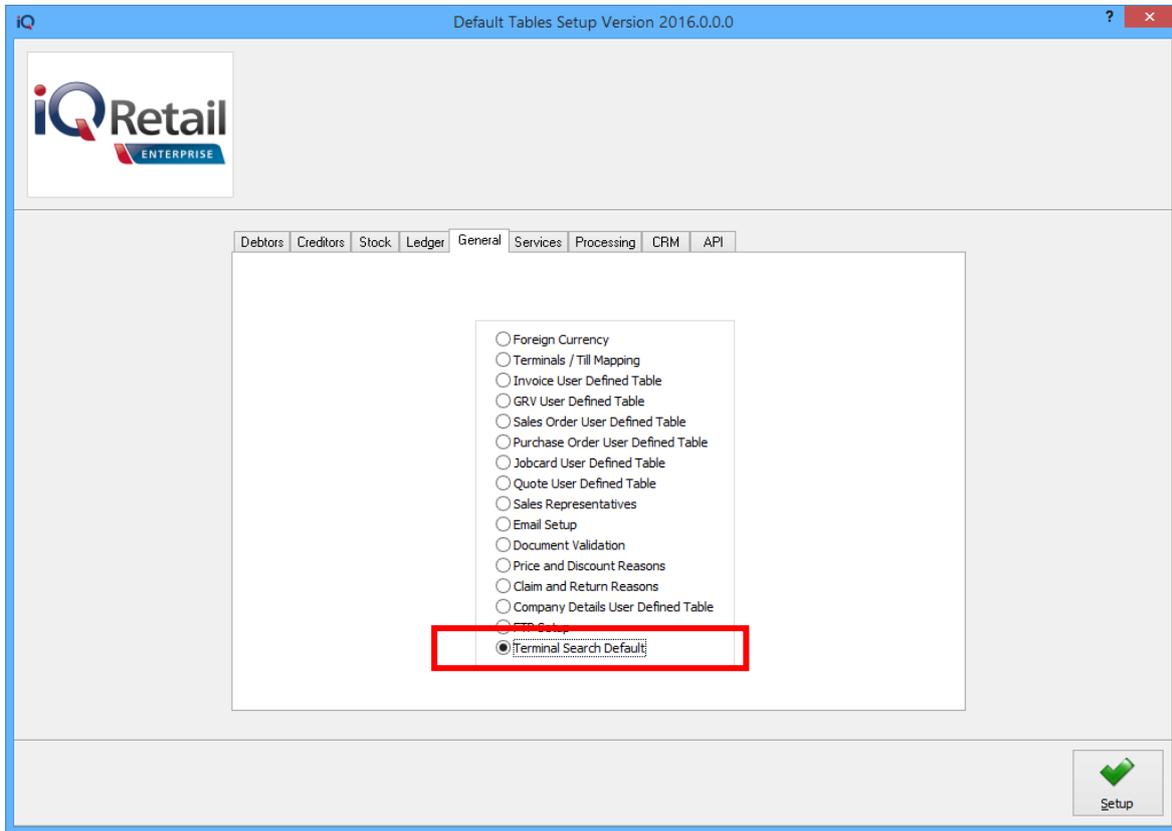
INTRODUCTION

The Predefined Search Order allows the user to change the search sequence or order on stock items per terminal. In other words, this option allows the user to set each terminal up to search stock items per field in the stock master file. Example the user can set the cashiers up to search stock items by barcode, the grv clerk to search by description or supplier-code, etc.

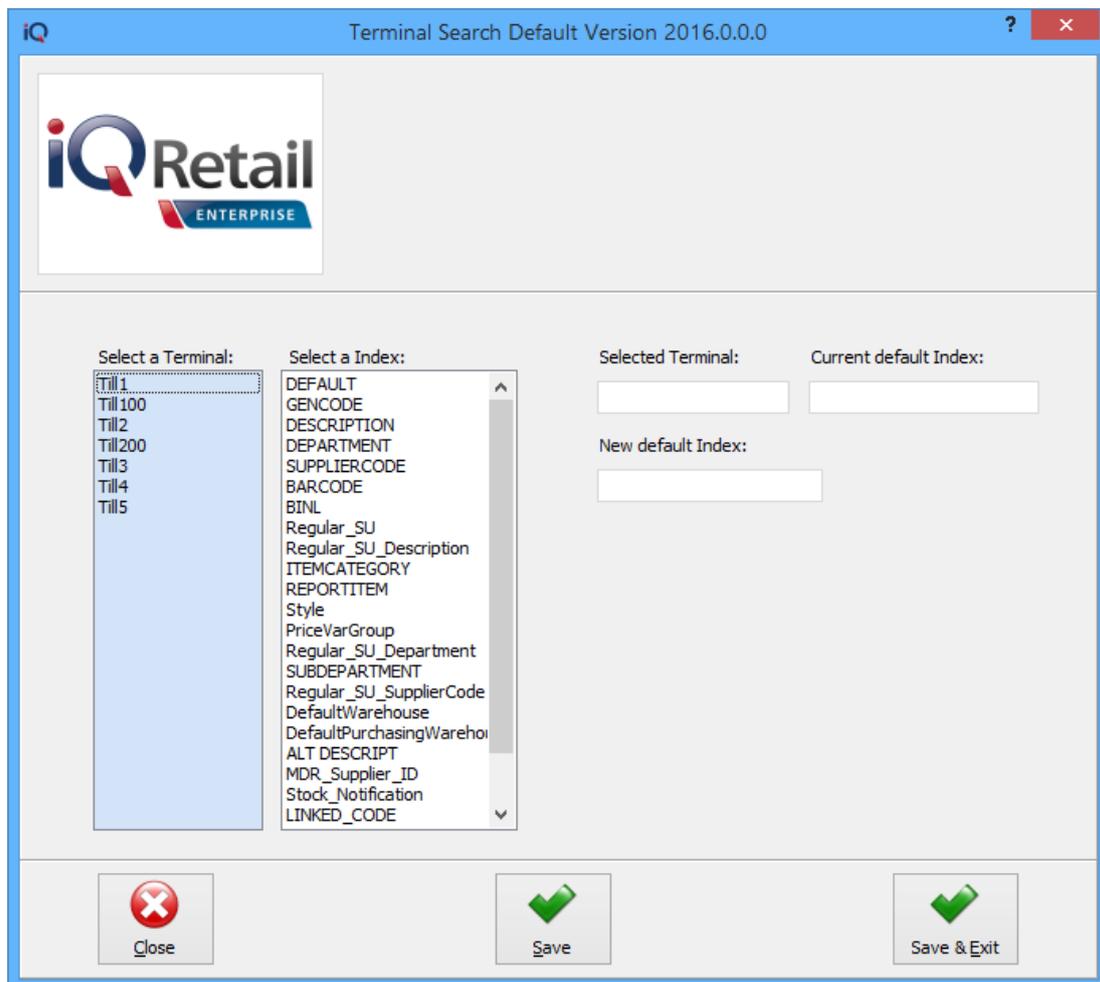
SETUP

The setup of terminals is done in Module Parameters.

From the IQ, main menu → Utilities → Setup → Module Parameters → General tab → Terminal Search Default.

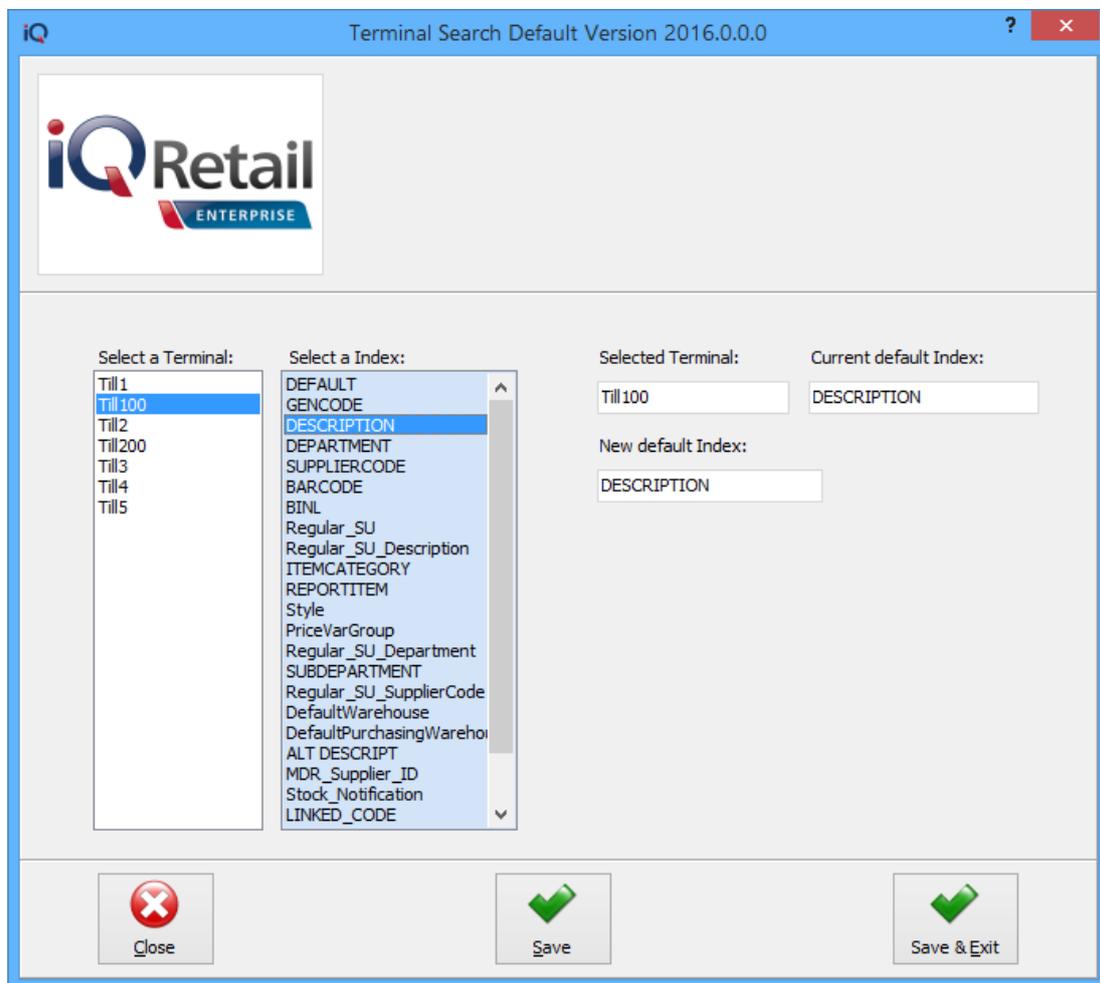


Select the Terminal Search Default option and click on the Setup button at the bottom of the screen.



TERMINAL SEARCH DEFAULT

SELECT A TERMINAL	All the terminals (tills) that are attached to the IQ system, are listed here. Select the specific terminal, which must be setup. The selected terminal will be highlighted and display in the Selected Terminal field on the screen.
SELECT A INDEX	All the index fields in the Stock Master file, are listed here. Select the specific index field which the user at that terminal will usually use to search for stock items. The selected index field will be highlighted and display in the New Default Index field on the screen.
SELECTED TERMINAL	The terminal which is currently selected to be setup, is displayed in this field.
CURRENT DEFAULT INDEX	The index field of the stock master file, to which the selected terminal was defaulting, is displayed in this field.
NEW DEFAULT INDEX	The newly selected Index field in the stock master file, to which the terminal will be defaulting after this setup is changed, is displayed in this field.



BUTTON FUNCTIONALITY

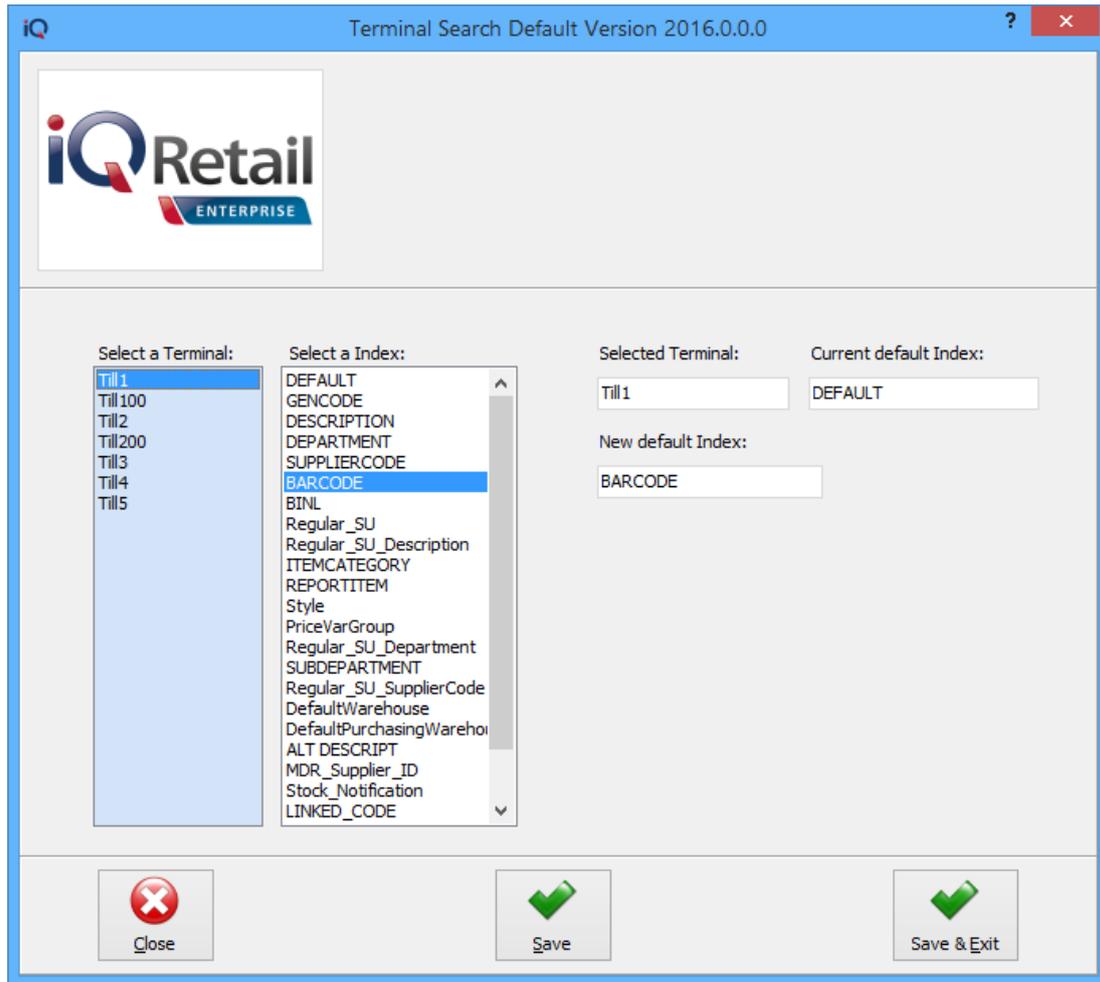
CLOSE	The Close option allows the user to discard any changes made, without changing them.
SAVE	The Save option allows the user to save the setup for the selected terminal. NOTE: The user should remember to check that the setting is not changed again to the 'New default Index', as it might display a blank or default index in the field.

<p>SAVE & EXIT</p>	<p>The save & Exit option allows the user to change a selected setup and exit the Terminal Search Default screen.</p>
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FUNCTIONALITY

Once a search order for a specific terminal has been setup, the system will default that terminal's stock master file's search order to the setup field every time the specific terminal is used. For example: the terminal is setup to search stock by the barcode order. When the user at the terminal search for specific stock items, the system will list stock in barcode order. The user may change the order to one of the other sort orders, but the change will only be effective until the transaction is completed. The next search will again default to the barcode.

EXAMPLE



Terminal 1 (till1) has been setup to default to barcode searching order. Each time this terminal is used to search for stock items, the stock items are listed in the barcode order.

iQ
Search Version 2016.0.0.0
?
✕



Search By - double click to change

- DEFAULT
- GENCODE
- DESCRIPTION
- DEPARTMENT
- SUPPLIERCODE
- BARCODE**
- BINL
- Regular_SU
- Regular_SU_Description
- ITEMCATEGORY

Barcode	Code	Description	Dept	Bin	PackSize	Onhand	v
000000051201	000000051201	NIKE JOGGING SHORTS	008	1	0	0.00	
000000051202	000000051202	NIKE JOGGING SHORTS	008	1	0	0.00	
000000051203	000000051203	NIKE JOGGING SHORTS	008	1	0	0.00	
000000051204	000000051204	NIKE JOGGING SHORTS	008	1	0	0.00	
000000060401	000000060401	NIKE JOGGING SHIRT GS	001	1	0	-28.00	
000000060402	000000060402	NIKE JOGGING SHIRT GM	001	1	0	78.00	
000000060501	000000060501	NIKE JOGGING SHIRT BLS	001	1	0	360.00	
000000060502	000000060502	NIKE JOGGING SHIRT BLM	001	1	0	111.00	
000000070101	000000070101	NIKE ROAD RUNNING SOCKS BS	001	1	0	144.00	
000000070103	000000070103	NIKE ROAD RUNNING SOCKS BL	001	1	0	51.00	
000000070302	000000070302	NIKE ROAD RUNNING SOCKS YM	001	1	0	318.00	
000000080101	000000080101	NIKE OFFROAD RUNNING SOCKS BS	001	1	0	240.00	
000000080102	000000080102	NIKE OFFROAD RUNNING SOCKS BM	001	1	0	75.00	



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