



**akuiteo**  
BUSINESS SOFTWARE

General Guide

# AKUITEO SEARCH

Version 4.5

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# 1 Preface

## 1.1 REVISIONS

**Revision 1**

Published in April 2021

## 1.2 HELP DESK

Akuiteo S.A.S. highly values your satisfaction.

To share your feedback or contact the help desk, feel free to visit our website page:

<https://www.akuiteo.fr/akuiteo.clients/>

## 2 Introduction to Akuiteo Search

Akuiteo provides an indexing tool that allows you to browse data within your ERP software.

All you need to do is to type your search in the relevant field to get the list of management objects and documents linked to your search.

The screenshot shows the Akuiteo Search interface. At the top, there is a search bar with the text 'Akuiteo' entered. Below this, the 'Search projects' tab is active. The interface is divided into several sections: 'Main criteria', 'Classification', 'Managers', and 'Multiple-selection criteria'. The 'Main criteria' section includes fields for 'Code' and 'Call name' for 'Project', 'Customer', and 'End customer', as well as 'Country', 'Campaign', and 'Opportunity'. The 'Classification' section includes fields for 'Project group', 'Division grouping', 'Division', 'Entity', 'Department', 'Activity', 'Year', and 'Project group grouping'. The 'Managers' section includes fields for 'Sales', 'Production manager', 'Controls manager', 'Project manager', and 'Financial manager'. The 'Multiple-selection criteria' section includes a dropdown menu and a table with columns 'Type/Code', 'Label', and 'Type'. The bottom of the interface shows the user's name 'AKUITEO 43' and the language 'English (United States) (en\_US)'.

### Types of files that can be indexed

In addition to akuiteo items, you can index the following documents:

- HTML, HTM
- XML
- TXT
- RTF
- PDF
- DOC, DOT, DOCX, DOCM,
- ODT, ODS, ODP, ODG
- XLS, XLT, XLA, XLSX, XLSM, XLTM
- PPS, PPT, POT, PPA
- PPTX, POTX, PPSX, PPTM, POTM, PPSM
- SQL

# 3 Installing and setting up Akuiteo Search

Please contact a project manager or Akuiteo's help desk to get information or documentation on how to set up Akuiteo Search.

# 4 Using Akuiteo Search

## From all Akuiteo screens

- 1 In the Application Desktop search field on the upper right, enter some text.
- 2 Press **Enter**. The list of management objects, documents or any other indexed elements is displayed.
- 3 Click on the entries on the left to filter the content according to your selection. These categories of objects on which you can click enable you to filter the view on the right. After clicking on **Akuiteo Objects**, you notice that you can click on **Type** then **Document**.
- 4 Double-click on the element to open.

**Reminder:** results are filtered according to users' access rights (DMF).

## From the new issue screen

- 1 Go to **Help Desk > New issue**.
- 2 In the **New quick issue** field, enter the element to search for among the following ones:
  - Customer
  - Contact
  - Contract
  - Product
  - Site

## 5 FAQ

In what sorting order are my search results displayed?

Search results are displayed in the following sorting order:

- Employees
- Sites
- Customer's contacts
- Suppliers

What syntax must be used?

Symbol	Use
title: AND text:	If you search for an object called <b>Public Project</b> with the <b>In progress</b> status, enter <b>title: "Public Project" AND text: progress</b> .
~	If you search for a word similar to <b>quote</b> , use the ~ symbol: <b>quot~</b> The search results will give you words such as <b>quote or quotation</b> . If you search for words such as <b>project</b> and <b>quote</b> separated by less than 10 words in a document, use the following request: <b>"project quote"~10</b> .
^	If you want to emphasize on a term in particular while searching, use the ^ symbol at the end of the searched word followed by a <b>number</b> indicating its level of importance. The higher the number is, the more important the searched word is. For example, if you search for <b>public project</b> but you would like to see <b>project</b> first in the search result, you should enter: <b>publicproject^4</b> . All objects containing the <b>project</b> word will be displayed first. You can do it with a whole sentence.
"..."	If you search for an exact term, enter this term between quotation marks "...".  For example: <ul style="list-style-type: none"><li>• Enter <b>"INFOR"</b> to search for INFOR.</li><li>• Enter <b>INFOR</b> to search for INFORMATION, INFORMER, etc.</li></ul>
Boolean operators You can use the boolean operators: <b>AND</b> , <b>+</b> , <b>OR</b> and <b>NOT</b> . Capital letters must be used.	
OR	To search for objects that contain either <b>public project</b> or just <b>project</b> , use the following request: <b>"public project" project</b> or <b>"public project" OR project</b> .
AND	To search for objects that have both <b>public project</b> and <b>customer quotation</b> , use the following request: <b>"public project" AND "customer quotation"</b> .
+	To search for objects that must contain <b>project</b> and that can eventually contain <b>quotation</b> , use the following request: <b>+project quotation</b> .
NOT	To search for objects that have <b>public project</b> but not <b>customer quotation</b> , use the following request: <b>"public project" NOT "customer quotation"</b> .



Symbol	Use
	Note: <b>NOT</b> cannot be used alone. For example, nothing will be found if you use the following request: NOT "public project". To search objects that have <b>public project</b> but not <b>customer quotation</b> , use the following request: <b>"public project" -"customer quotation"</b> .
Brackets	To search for <b>portal</b> or <b>customer</b> and <b>website</b> , use the following request: <b>(portal OR customer) AND website</b> . To search for a title that contains the word <b>plan</b> and the sentence <b>akuiteo project</b> at the same time, use the following request: <b>title:(+plan +"akuiteo project")</b> .

How many objects can I get in search results?

You can get 10 occurrences for each type of objects (10 projects, 10 customers, etc.)

In what field(s) are the searches performed?

By default, searches are performed in the following fields:

Record sheets	Fields
Customer contracts	ID contract number call name company ID
Task	ID company ID number + # + chrono number + # + call name internal description customer comment error code project ID
FAQ	ID company ID call name context question answer
Issue	ID number company ID number + "-" + call name customer reference customer reference 2 description internal description customer response internal responses error code on hold reason reason

Record sheets	Fields
Projects	ID call name address > city 1 address > address1 address > address2 address > address3 customer code customer name end customer code end customer name company ID
Other third-parties	ID call name full name address > city 1 address > address1 address > address2 address > address3 company ID
Campaign	ID code call name description company ID
Customer	ID code call name phone number company ID
Employee	ID code call name last name first name company ID
Supplier order	ID call name company ID supplier code supplier name supplier invoice code supplier invoice name
Customer order	ID call name company ID customer code

Record sheets	Fields
	customer name customer invoice code customer invoice name
Customer contact	ID name + ' ' + first name last name first name email office phone number phone number company ID customer name site call name
Supplier contact	ID last name first name company ID customer name site call name
Quotes	number company ID supplier code supplier name supplier invoice code supplier invoice name
Customer quotation	order number number + ' ' + date company ID customer code customer name customer invoice code customer invoice name
Customer invoices	invoice number company ID customer code customer name customer invoice code customer invoice name
Supplier invoices	invoice number company ID project ID supplier code supplier name supplier invoice code supplier invoice name

Record sheets	Fields
Supplier	ID company ID code call name full name city company ID address > address1 address > address2 address > address3
Deliveries	number company ID customer code customer name
Project group	ID code call name external reference description
Opportunity	number company ID call name customer code customer name description
Prospect	ID company ID code call name
Customer site	ID company ID call name customer name contact last name contact first name address > city address > address1 address > address2 address > address3 address > address4

### Can I use wild card characters?

Yes, you can use the following wild card characters:

The ? symbol allows you to replace only one character: i.e. te?t for text

The \* symbol allows you to replace several characters in a word. i.e. te\*t\* for texts or tests

### Note

These symbols must not be placed at the beginning of a word to get successful search results.

Does it search in linked documents?

Yes, linked documents can be indexed only if the server is set up in that way. Refer to your administrator for more information.

Are results filtered according to the user's rights?

Yes, results take the user profiles into account as well as the partitioning applied to their profiles. The user can only see the objects allowed. Example: if the object is linked to a private project AND the user does not have access to this project, then this object will not be displayed.

What is the request's execution time?

A request can take around 5 seconds to return a search.