

SOLABS QM10: Performing Searches and Queries

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Overview

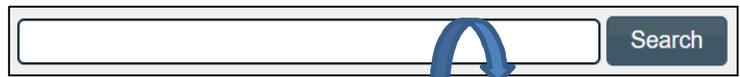
The general Search functions in SOLABS QM10 work as they do in most software and search engines.

About SOLABS Searching & Indexing

The SOLABS QM10 search engine uses the Solr/Lucene query parser. This is a platform with many benefits including speed, near real-time indexing, full-text search and wild-card matching.

The search engine indexes values and/or specific attributes of the documents and processes in SOLABS QM10. Indexing of values means these values are periodically scanned and stored for faster search results.

Performing General Searches



The General Search in SOLABS QM10 is found in the upper right of the screen. It is pre-populated for some of the more common search queries and will also include any Saved Search Queries.

Choosing one of those options will add a prefix to the Search field, after which you can enter the desired text and then click the **Search** button.

Entering text without a prefix will bring back anything in the Document or Process sections that matches.

NOTE: Multiple word text strings must be enclosed in double quotes, e.g, “Doc Coord” in order to be recognized and retrieved as one search term.

Public Search Queries

- Document Control Number
- Process ID
- Document Name
- Document File Content
- Document Author
- Process Initiator
- Process Currently With
- Process Values

General Search Abbreviations

This table below shows the abbreviations for each drop down menu option, the full field names, and a sample search for each abbreviation, with its corresponding natural language translation. Note that four are for Document searches and four for Process searches.

Abbreviation Used in Search [with colon]:	Full Field Name	Sample Search	Natural Language Equivalent
CN:	Document Control Number	CN:"QA-006"	Return Document Control Number QA-006
DN:	Document Name	DN:"Retained"	Return Documents where the name contains "Retained"
DFC:	Document File Content	DFC:assigned	Return Documents containing content 'assigned'
DA:	Document Author	DA:"QC ANLST"	Return documents where the author is QC ANLST
PIN:	Process Initiator	PIN:"QA SUP"	Return results where the Process Initiator is QA SUP
PCW:	Process Currently With	PCW:"Doc Coord"	Return Processes that are currently with Doc Coord
Pdata:	Process Values	Pdata:Approve	Return Processes where 'Approve' appears in the Process Values table
Pid:	Process ID	Pid:"CCR-000002"	Return Process ID CCR-000002
NOTE: Multiple word text strings must be enclosed in double quotes, e.g, "Doc Coord" in order to be recognized and retrieved as one search term.			

Search Results

The results of a search include highlighting of the search criteria used for the query. Results shown to users are filtered according to pre-assigned privileges. If expected results are not retrieved, users may want to check that their assigned permissions in the Document Section or Process Section are adequate for their searching needs.

Home > Search results

Monitor

Search

PROCESSES

Search results for : Monitor

Unique ID: CAPA50-000001 Date Initiated: 28-Jan-2021 Status: Completed View

Current Process Task: N/A

Searched Entry:
Process Values: TRUE Monitor packaging equipment setup process and meet with Production staff to determine whether

Expand all

DOCUMENTS

Search results for : Monitor

Name: SOLABS QM10 Intro to Process S[...] No.: UM000006 Due: <empty> Status: Approved & Effective Open | View

Searched Entry:
Document File Content: Section The PROCESS section allows you to monitor complex workflows, approvals, reviews—any workflow

Search Document Standard Attributes

The following Standard Attributes can be searched through their acronyms (ex: da:administrator) or through their value alone (ex: administrator).

- Control Number => cn
- Effective Date => efd (Effective Date will not be highlighted though on what comes back)
- Originator (Author) => da
- Document Owner => do
- Document Coordinator => dc

Search Document System Attributes

System Attributes can be used to search for documents. The search criteria are entered as follows:

sysatt_ + attribute alias name:

sysatt_PPL:dextrose	Search
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Example: Documents that have a System Attribute for Pharmaceutical Product List

To find the Attribute Alias Name, go to the Setup Section of the application and under the Administration tab, select System Attributes, then Active. Select View next to the desired Attribute. You will see the Attribute Alias Name listed under the Attribute Name.

System Attribute Details	
Name:	Pharmaceutical Product List
Alias:	PPL

Note about Special Characters in the Alias

Spaces are replaced by “_” at indexation. If the Alias contains other special characters (ex: parenthesis) it will not be searchable by specifying the Alias name in the query – the query will fail.

Search by Date from Main Search Bar

Certain dates are searchable from the main Search bar. They are also searchable through the search **Refine** options.

Note: Only the dates listed below are searchable. Other process dates (ex: inside a process field) and any custom attributes of type “Date” are not considered as dates by the search engine, but as normal text. Dates will not be highlighted when the Search results are returned. The acronyms that you will need for searching by different dates are listed below.

Document Section:

- nextReviewDate => nrd
- effectiveDate => efd
- latestModificationDate => lmd

Process Section:

- instanceStartDate => psd
- instanceEndDate => ped

Example - How to search by date range from the main Search bar:

- searching a date range: efd:[2017-07-06T00:00:00Z TO 2017-07-20T00:00:00Z]
- searching a date range using "*" and keyword "NOW": efd:[* TO NOW] (means: effective date in the past) efd:[* TO 2020-01-01T00:00:00Z] (means effective date before 2020-01-01)
- searching a single date is **not supported** for the moment (ex: 2017-08-01)

Searching by Status

The status that is indexed for the search, is currently not the same as what will then be displayed to the user. Here are the mappings:

Document (acronym for status : dst)

- Authoring => IN_AUTHORING
- Review => IN_REVIEW
- Approval => IN_APPROVAL
- Approved (not effective) => APPROVED
- Effective => EFFECTIVE
- Superseded => SUPERSEDED

Process (acronym for status : pst)

- In Process => OPEN
- Completed => CLOSED
- Cancelled => CANCELLED

Sophisticated Search Query Examples

Query	Description
sysatt_Add_Info:"document obsolete" AND df:folder1 AND dt:docType1 AND da:administrator	Documents with an Additional Information attribute containing "document obsolete" (exactly), that are located in folder1, that have a Document Type of docType1 and where the author is an Administrator.
dn:*customer1* AND da:user1 AND lmd:[NOW/DAY TO *]	Documents with a name containing "customer1", where the author is user1 and that were modified today.
dst:APPROVED AND efd:[NOW/DAY TO NOW/DAY+7DAYS]	All approved documents that have an effective date in the next week starting today at midnight.
dfc:procedure OR dn:procedure	All documents having either "procedure" in the name or in the content.
dfc:(IN_AUTHORING OR IN_APPROVAL OR IN_REVIEW) AND sysatt_customer:PharmaX	All document versions with a status of Not Approved, where the custom attribute referred by the Alias "customer" is "PharmaX".

Saving Search Queries

Refer to User Guide titled **SOLABS QM10: Introduction for General Users** for additional information on the Search Field, the Search Tab and Saved Queries.