

## Creating Search Lists within Aspire

Within Aspire, search lists provide a mechanism for displaying data about various types of information. The following are a few of over one hundred lists available within Aspire:

- Contacts
- Opportunities
- Invoices
- Properties
- Work Tickets
- Purchase Receipts

Lists allow users to create reports that fit their needs, or to locate specific sets of data items pertinent to a task. Aspire allows users to specify criteria for displaying a list, and then name and save that criteria as a named advanced search so that they can produce the same list later.

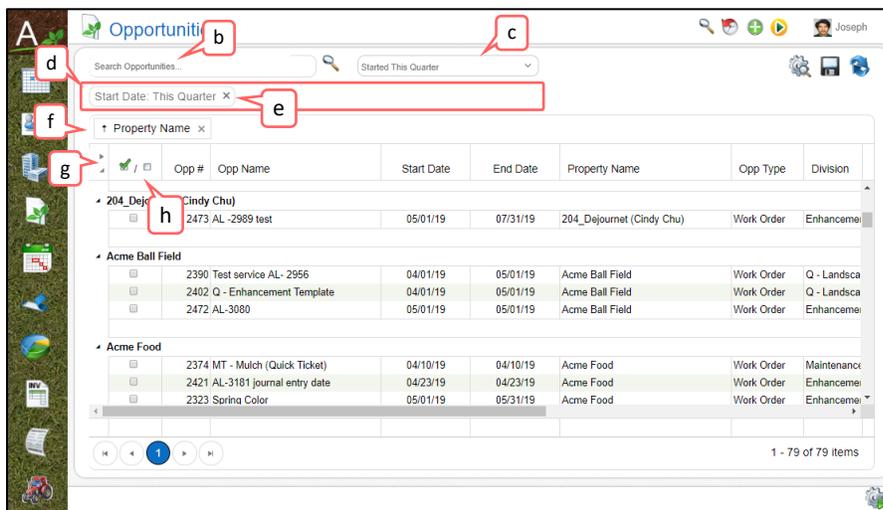
There are four types of criteria that allow the user to define a list:

1. **Filters** – Allows the user to refine the records returned in the list.
2. **Display** – Allows the user to determine which fields of information are displayed for each returned record.
3. **Sort** – Allows the user to specify the order that records are displayed.
4. **Group** – Allows the user to logically group records based on specific fields.

While using Aspire users will become very acquainted with the building of lists. There are multiple ways to make a list: the user can create a new list or change an existing one. Lists can be used to create dashboard dials. This article provides a simple guide to help understand how to create and save lists.

### Search List Screen

For this article, we will use the *Opportunity* list to demonstrate the various list creation concepts. These concepts can be applied to any other search lists in Aspire. To access the *Opportunities Search List* screen, click the *Opportunities* icon in the *Aspire Navigation Bar* as shown on the right. The *Opportunities Search List* screen looks like this:

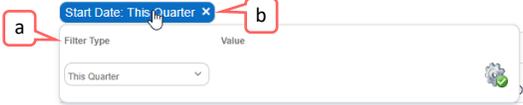
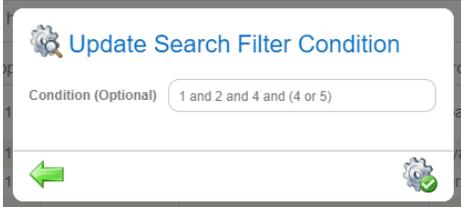


The specific records returned and fields the user sees displayed will be different and depend on the criteria they have specified. Other attributes of the screen will differ based on the user's custom settings as described in the following table:

Screen Characteristic	How to change it
Font size for list	Specified on the on the <i>User</i> screen (available by hovering over user icon in the upper right corner of screen) by selecting the <i>Customizations</i> tab and set the font-size value of the <i>Advanced Search List Font Size</i> fields.
Font color for list	

The following table summarizes screen elements that are common to all search list screens in Aspire.

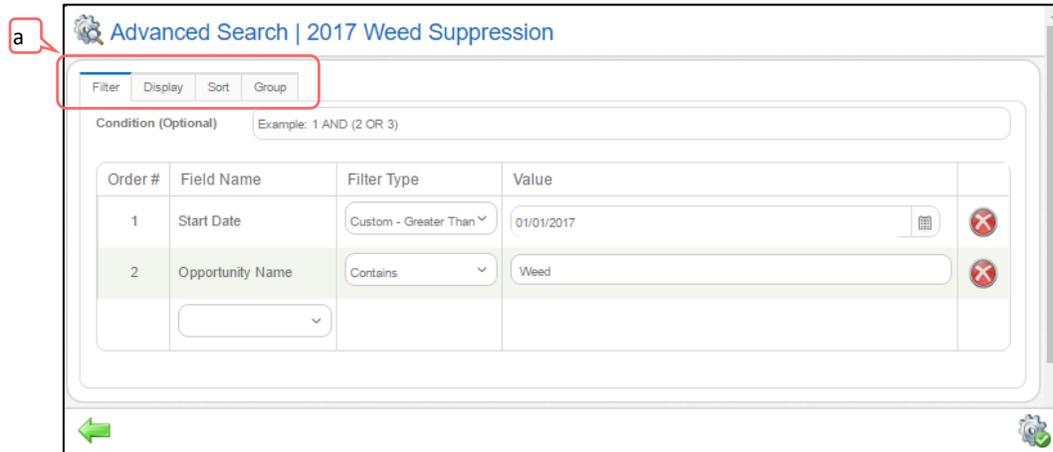
Name / Label	Description
Search String <sup>b</sup>	Allows the user to type a search string to quickly zero in on specific records. For example, when the user is in the <i>Opportunity Search List</i> , they might type in an opportunity number, or part of a property name. The list will immediately be reduced to show only records containing the string that they typed.
Search Icon 	After typing a string in the <i>Search String</i> field, click on this icon to initiate the search. Pressing ENTER has the same effect.
Search List Name <sup>c</sup>	The user can save and name search list definitions so that they can later recall them. This drop-down allows them to select a search list that they have previously defined and named.
View Advanced Search Icon 	Clicking this icon displays the <a href="#">Advanced Search screen</a> which allows the user to specify which information to display and its appearance.
Save Icon 	<p>Hovering over the <i>Save</i> icon displays a menu of options that relate to the currently displayed search view.</p> <ol style="list-style-type: none"> <li><b>Save</b> – Saves any changes that the user has made to the advanced search criteria and associates it with the name shown in the <i>Search List Name</i> field. When they select this option, the <a href="#">Advanced Search Save screen</a> displays allowing them to share the named view with another user, change the page size, or set the view as their default.</li> <li><b>Save As</b> – Creates a new advanced search allowing the user to specify its name. When they select this option, the <a href="#">Advanced Search Save screen</a> displays allowing them to share the named view with another user, change the page size, or set the view as their default.</li> <li><b>My Default</b> – Sets the advanced search whose name appears in the Search List Name field as their default view. The next time the user logs into Aspire and goes to that search list, the default advanced search will be displayed.</li> <li><b>Delete</b> – Deletes the advanced search whose name appears in the Search List Name field.</li> <li><b>Print to Screen</b>  – Generates a printable (HTML) version of the search list and displays the printer dialog allowing the user to print it.</li> <li><b>Print to PDF</b>  – Generates a PDF file containing the information in the search list and makes it available according to the browser's approach to handling external files. This icon will only be displayed if the user has the <i>Allow Export</i> permission.</li> <li><b>Print to Excel</b>  – Generates an Excel file containing the information in the search list and makes it available according to the browser's approach to handling external files. This icon will only be displayed if the user has the <i>Allow Export</i> permission.</li> </ol> <p>Some options may not be available under certain conditions.</p>
Reset Advanced Search Icon 	When the user chooses an advanced search by picking its name from the Search List Name field, they can then change the criteria without saving the view. If they have made changes to the advanced search, but have not saved those changes, clicking this icon reverts the search criteria to their last saved value and refreshes the list based on those criteria.

Name / Label	Description
Filter Summary <sup>d</sup>	<p>This area summarizes the filters that are defined using the <i>Filter</i> tab accessed by clicking the <i>View Advanced Search</i>  icon. This area can be displayed or hidden based on user settings. Display of this area is set on the <i>User</i> screen (available by hovering over user icon in the upper right corner of screen) by selecting the <i>Customizations</i> tab and checking the <i>Advanced Search List Show Filter Header</i> checkbox.</p> <p>Clicking on one of the filters in this area expands it<sup>a</sup> allowing the user to change the filter. Clicking the X next to a filter will remove it. In order to add new filters, it is necessary to click the <i>View Advanced Search</i>  icon, and add the filters using the <i>Filter</i> tab.</p>  <p>If the advanced search is comprised of multiple filter fields and has a <a href="#">condition</a> defined (i.e. “1 and 2 and 4 and (4 or 5)”), then when the user deletes one of the criteria by clicking the X, Aspire displays the <i>Update Search Filter Condition</i> dialog<sup>c</sup> that allows the user to update the condition to match the new list of filters before refreshing the search list.</p> 
Group Bar <sup>f</sup>	<p>This optional bar allows the user to drag onto it headers from any of the columns in the list to group the list items by the values in that column. This same type of grouping can be performed from the <i>Group</i> tab of the <a href="#">Advanced Search screen</a>. Some users may prefer to hide this <i>Group Bar</i> to provide more space for data. To hide or display this bar, go to <i>User Settings</i> (hover over user icon in the upper right corner of screen), select the <i>Customizations</i> tab, and change the value of the <i>Advanced Search List Show Group Header</i> checkbox.</p>
Expand/Collapse Icons <sup>e</sup>	<p>These icons are available only if the user has chosen to group the list by at least one field. If the user has grouped by several different fields, then there will be a pair of expand/collapse icons for each grouping. Clicking on the Collapse All  icon hides all lines under the chosen grouping. Clicking the Expand All  icon causes all lines under the chosen grouping to be displayed if they are not already.</p>
Select/Deselect All Icons  / 	<p>These icons are only available for search lists that allow selection of list items for bulk actions. Clicking the Select All  icon enables the checkmark for all items in the list. Clicking the Deselect All  icon disables the checkmark for all items in the list.</p>

## Advanced Search Screen

The *Advanced Search List* screen depicted below is available for any search list and is used to specify which information to display and its appearance. The screen is comprised of four tabs<sup>a</sup> that allow the user to specify:

1. Which records should be displayed (filter tab)
2. Which fields should be displayed for each record (display tab)
3. The order in which the records should be displayed (sort tab)
4. Fields for grouping records together (group tab)



The *Back*  and *Apply*  icons are available regardless of which tab is displayed. The *Back* icon returns to the search list without applying any criteria changes to the search list. The *Apply* icon returns to the search list applying any changes that were made to the criteria on any of the four tabs.

### Filter Tab

The fields for the filter tab are displayed in the image above. The filter tab allows the user to provide criteria that determine which records are returned.

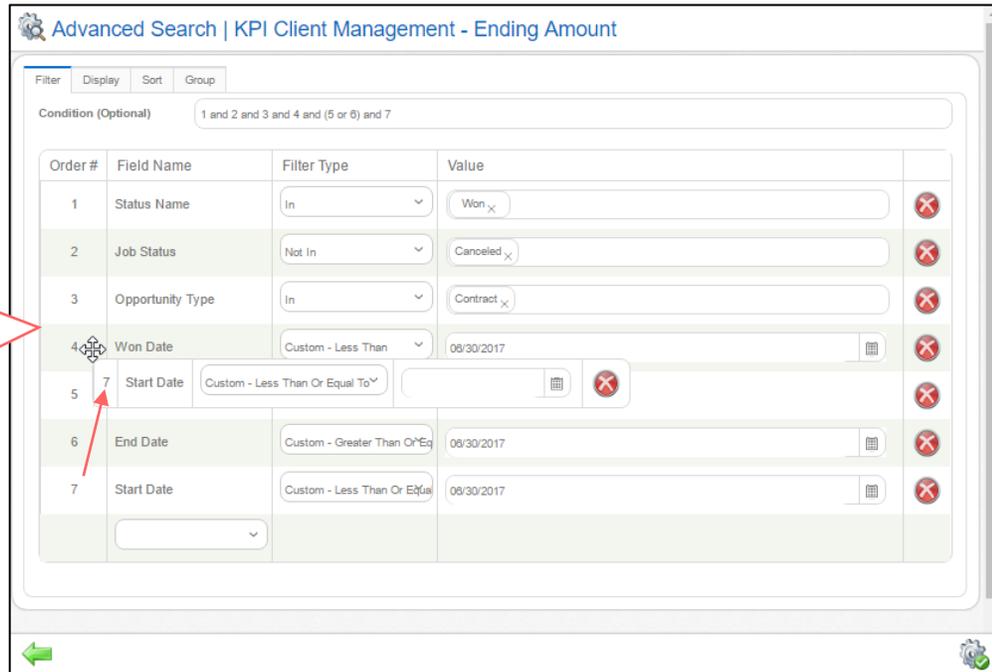
Name / Label	Description
Condition	For most simple queries, the user will not be required to enter any value in this field. If they leave this field alone and do not enter anything, then Aspire will display records that meet all the criteria in the rows below. They only need to use this field when they want to introduce an “or” condition (i.e. Opportunity Name contains “grass” or Opportunity Name contains “weeds”). For additional information, see <a href="#">Specifying More Complex Conditions</a> .
Order #	Always sequentially numbers the listed conditions. These numbers are used for <a href="#">specifying more complex conditions</a> .
Field Name	Shows the name of the field on which the user wants to filter records returned in the list. The last criteria row will always contain a drop-down that allows them to select from a list of fields that are relevant to the type of object they are searching (in this article, we are searching opportunities). When they select a field in the drop-down, a new line is immediately added, and they are given the opportunity to specify how to filter on the newly added field.
Filter Type	Once a field has been added to the list, this drop-down allows the user to select the nature of the filtering. The filter types listed in the drop-down will differ depending on the type of field (i.e. filter types for dates are different than filter types for strings, numbers or selection lists.) In the example above, the user can see that Start Date has a filter type of “Custom – Greater Than” which would not be applicable to an Opportunity Name. Likewise, the filter type of “Contains” that is selected for the Opportunity Name would not be applicable to the date. The full list of <a href="#">filter types</a> is provided below for the various field types.
Delete Icons 	Clicking one of these icons which appear in each row deletes the criteria row.
Value	Allows the user to specify a value that will be compared to available records based on the filter type to determine which data records are displayed in the search list.

### Reordering Criteria

As the user adds criteria, they can reorder them by holding down the mouse button over the order # for one of the lines while dragging it on top of an order # for another item.

1. If the user is dragging a criteria item down on the screen (toward the bottom of the list) and drops it, the dragged item will appear after the item on which they drop it.
2. If the user is dragging a criteria item up on the screen (toward the top of the list) and drops it, the dragged item will appear before the item on which they drop it.

Dragging item 7 so that the cursor is on top of item 4 will position it here before 4. Items will then be renumbered.



Order #	Field Name	Filter Type	Value
1	Status Name	In	Won_x
2	Job Status	Not In	Canceled_x
3	Opportunity Type	In	Contract_x
4	Won Date	Custom - Less Than	08/30/2017
5	Start Date	Custom - Less Than Or Equal To	
6	End Date	Custom - Greater Than Or Equal To	08/30/2017
7	Start Date	Custom - Less Than Or Equal To	08/30/2017

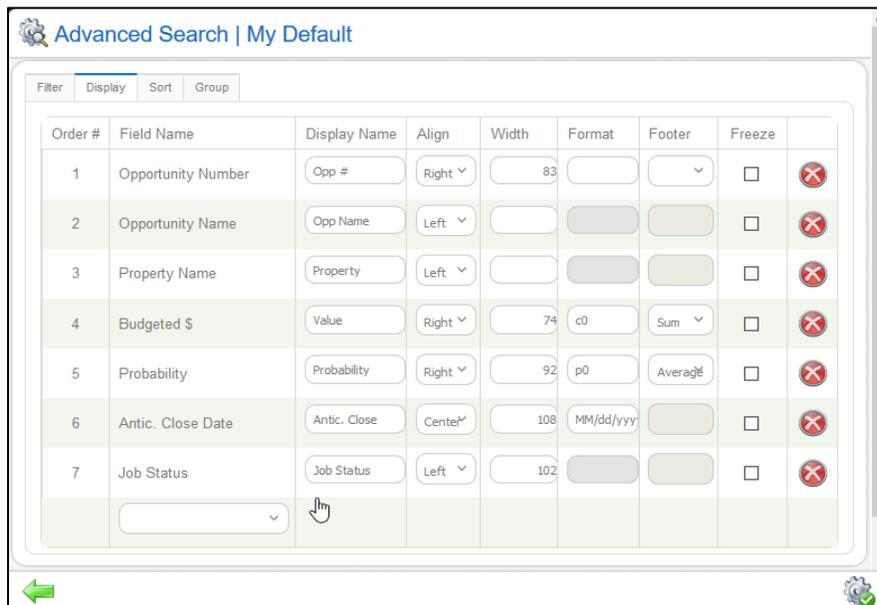
### Filter Types

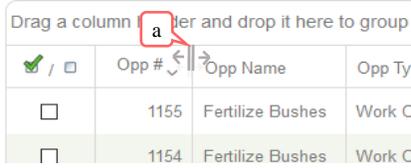
Field Type	Filter Type
String (Multi-Select)	In
	Not In
String (Search)	Equals
	Does Not Equal
	Starts With
	Ends With
	Contains
	Does Not Contain
	Is Blank
	Is Not Blank
Numeric	Equals
	Does Not Equal
	Less Than
	Less Than or Equal To
	Greater Than
	Greater Than or Equal To
	Between
Boolean (yes or no)	Equals
	Does Not Equal
Date	Today
	Yesterday
	This Week
	This Month

Field Type	Filter Type
	This Quarter
	This Year
	This Fiscal Year
	Through This Week
	Through Last Week
	Through Today
	Through Yesterday
	Through Last Month
	Last Week
	Last Month
	Last Quarter
	Last Year
	Last Fiscal Year
	Last 30 Days
	Last 60 Days
	Last 90 Days
	After Today
	Custom - Equals
	Custom - Does Not Equal
	Custom - Less Than
	Custom - Less Than or Equal To
	Custom - Greater Than
	Custom - Greater Than or Equal To
	Custom - Between
	Custom - Is Null

### Display Tab

The fields for the *Display* tab are displayed in the image below. This tab allows the user to specify which fields are displayed for each returned record.



Name / Label	Description
Order #	Read only. Specifies the order in which the fields will be displayed in columns of the search list. Fields are always displayed in numeric order. The field order can be changed by dragging and dropping rows in the same manner as <a href="#">reordering filter criteria</a> .
Field Name	Shows the name of the fields to be displayed in the search list. The last field row will always contain a drop-down that allows the user to select from a list of fields that are relevant to the type of object they are displaying (in this article, we are working with opportunities). When they select a field in the drop-down, a new line is immediately added and they are given opportunity to specify display attributes for the newly added field.
Display Name	Allows the user to specify the label to appear at the top of each column in the search list. This allows them, for example, to abbreviate field names so that they can be displayed in a narrow space.
Align	Allows the user to specify how information will be aligned left-to-right within its column in the search list. Options are left, center or right.
Width	Allows the user to specify the width of the field. They can also adjust the field list directly on the search list screen by dragging the border between the columns <sup>a</sup> . When columns are adjusted by dragging the edge of the column in this manner, Aspire updates the <i>Width</i> field appropriately. Leaving the <i>Width</i> field blank allows for the columns to adjust based upon the device being used at the time or the size of the browser window. Adding widths could negatively affect viewing on smaller devices. <div data-bbox="1019 688 1430 856" style="float: right; border: 1px solid gray; padding: 5px;">  </div>
Format	For numeric and date fields, this field allows the user to specify the appearance of the displayed value as described below under <a href="#">Field Formatting</a> .
Footer	For numeric fields that may be totaled, this field allows the user to specify the type of total value that Aspire should compute and display in the footer of each section (based on grouping) and as a grand total at the bottom of the list. Valid options are: average, count, max, min and sum. For certain fields (i.e. Gross Margin % or advanced search formula fields) that are aggregated based on other fields, a special option is additionally available called "Custom". If "Custom" is selected, then the individual values are summed before applying the calculation (i.e. [TotalRevenue – TotalCost] / TotalRevenue).
Freeze	This checkbox allows the user to select fields that should be placed as the left-most columns in the list and prevented from scrolling left and right when the user scrolls the remaining fields using the scroll bar. For example, if they choose to add many columns to be displayed on the opportunity search list, they might choose to freeze the <i>Opportunity Number</i> and <i>Opportunity Name</i> on the left, so that as they scroll the other columns, they will be able to visually identify the rows based on the two columns that are always visible as they scroll left or right.
Delete Icons 	Clicking one of these icons which appear in each row deletes the display field row.

### Field Formatting

The string that the user specifies in the *Format* field determines how values will be formatted when displayed in a search list. Aspire supports two styles that can be used to yield similar results: new and legacy. The legacy format is still supported, but Aspire recommends using the new format – especially for currency and numeric values. Aspire automatically sets initial field formatting values which the user can adjust as desired.

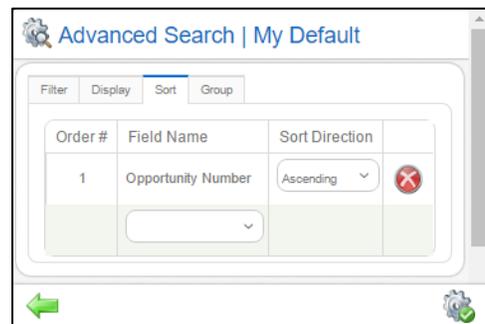
Legacy formatting was provided for numbers based on combinations of the following symbols: "\$", "#", ".", "% and "0"; and for dates with symbols "M" (month), "d" (day), "y" (year), "h" (hours), "m" (minutes), "s" (seconds) and "tt" (am/pm). The new formatting string specifies whether the value should be represented as currency, percent, numeric, date, full date/time or general date/time (c, p, n, d, F, or g). Here are some common examples of the new and legacy formats.

Format Style	Format Type	Format String	Example Value	New Representation
New	Currency	c	-1234.567	(\$1,234.57)
	Currency	c3	1234.567	\$1,234.567
	Numeric	n1	1234.567	1,234.6
	Numeric	n	1234.567	1,234.57
	Percent	p1	.123	12.3%
	Date	d	September 12, 2017 11:33 am	9/12/2017
	Date	F	September 12, 2017 11:33 am	Tuesday, September 12, 2017 11:33:00 AM
	Date	g	September 12, 2017 11:33 am	9/12/2017 11:33 AM
Date	G	September 12, 2017 11:33 am	9/12/2017 11:33:00 AM	

Legacy	Currency	\$###,###,###.000	-1234.567	\$-1,234.57
	Currency	\$###,###,###.000	1234.567	\$1,234.567
	Numeric	###,###,###.0	1234.567	1,234.6
	Numeric	###,###,###.0	1234.567	1,234.57
	Percent	###.0%	.123	12.3%
	Date	MMMM dd, yyyy hh:mm:ss tt	September 12, 2017 11:33 am	September 12, 2017 11:33:00 AM
	Date	MM/dd/yy hh:mm:ss tt	September 12, 2017 11:33 am	09/12/2017 11:33 AM

### Sort Tab

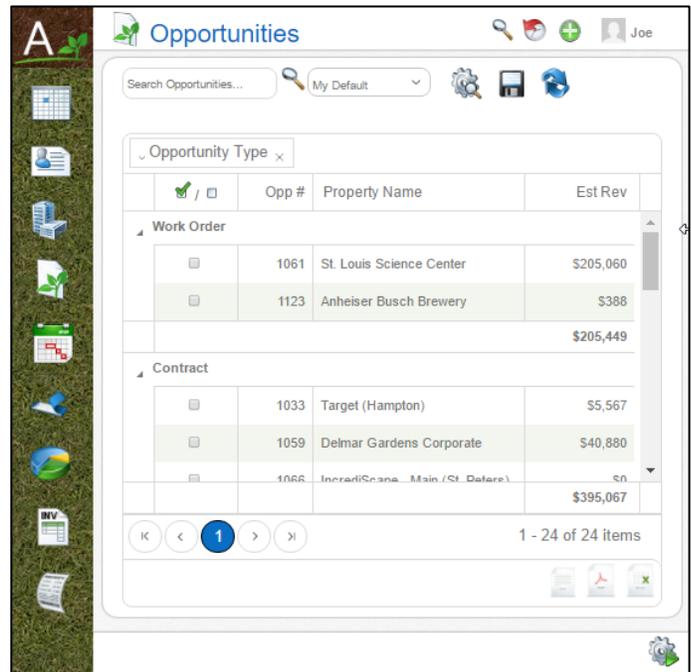
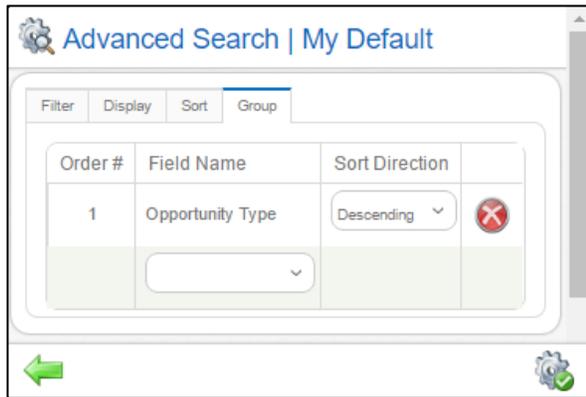
The fields for the *Display* tab are displayed in the image below. This tab allows the user to specify which fields are used to sort displayed records.



Name / Label	Description
Order #	Read only. Specifies the order in which the fields will be utilized for sorting the search list (first sort by field #1, then by #2, etc.). Fields are always displayed in numeric order. The field order can be changed by dragging and dropping rows in the same manner as <a href="#">reordering filter criteria</a> .
Field Name	Shows the name of the fields to be used for sorting the search list records. The last field row will always contain a drop-down that allows the user to select from a list of fields that are relevant to the type of object they are displaying (in this article, we are working with opportunities). When they select a field in the drop-down, a new line is immediately added and they are given opportunity to specify the sort direction for the newly added field.
Sort Direction	Allows the user to specify whether the records will be sorted in ascending order (1, 2, 3) or descending order (z, y, x).
Delete Icons 	Clicking one of these icons which appear in each row deletes the display field row.

### Group Tab

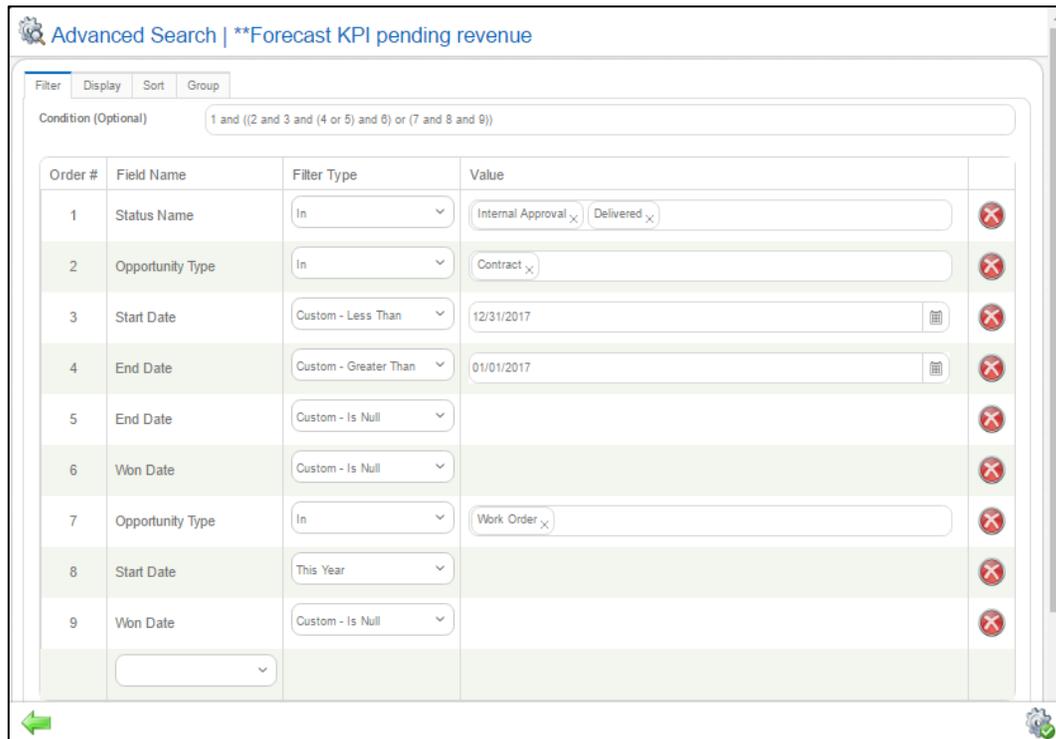
The fields for the *Group* tab are displayed in the image below. This tab, shown below, allows the user to specify which fields are used to group displayed records. The image at right shows an opportunity list that is grouped by opportunity type which can have a value of “Contract” or “Work Order”.



Name / Label	Description
Order #	Read only. Specifies the order in which the fields will be utilized for grouping the search list (first group by field #1, then by #2, etc.). Fields are always displayed in numeric order. The field order can be changed by dragging and dropping rows in the same manner as <a href="#">reordering filter criteria</a> .
Field Name	Shows the name of the fields to be used for grouping the search list records. The last field row will always contain a drop-down that allows the user to select from a list of fields that are relevant to the type of object they are displaying (in this article, we are working with opportunities). When they select a field in the drop-down, a new line is immediately added and they are given opportunity to specify the sort direction for the newly added field.
Sort Direction	Allows the user to specify whether the groups which will be based on the selected field should be sorted in ascending order (1, 2, 3) or descending order (z, y, x).
Delete Icons 	Clicking one of these icons which appear in each row deletes the display field row.

### Specifying More Complex Conditions

The *Condition* field on the *Filter* tab of the [Advanced Search screen](#) allows the user to express more complex filter conditions for determining which records are displayed in a search list. The Filter tab depicted below provides an example...



Order #	Field Name	Filter Type	Value
1	Status Name	In	Internal Approval, Delivered
2	Opportunity Type	In	Contract
3	Start Date	Custom - Less Than	12/31/2017
4	End Date	Custom - Greater Than	01/01/2017
5	End Date	Custom - Is Null	
6	Won Date	Custom - Is Null	
7	Opportunity Type	In	Work Order
8	Start Date	This Year	
9	Won Date	Custom - Is Null	

The following items should be considered when constructing more advanced searches and are demonstrated in the example above.

1. Use the condition field when introducing an “or” condition into the criteria (i.e. *End Date Greater Than 1/1/2017 or End Date is Null*<sup>1</sup>)
2. Use parenthesis to specify the order in which the logical “and/or” operators should be applied.
3. If the user is using the *Condition* field, they should make sure that all listed order numbers (*Order #* column) are incorporated in it. Otherwise, Aspire may generate an error when they save the advanced search or search results may be indeterminate.

<sup>1</sup> “Null” means the field does not have a value.

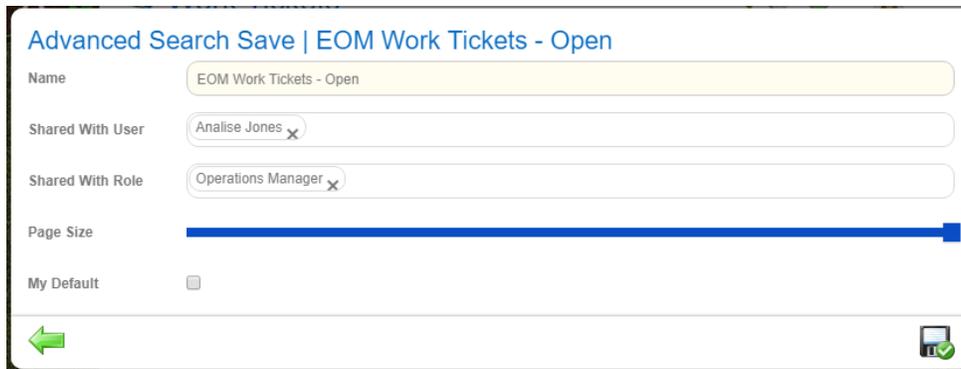
### Filter Types

When the user chooses to filter returned information based on a field, the type of the field (i.e. date, number, string, etc.) determines the type of filtering they can do on the field. The following table shows the types of filters that are available for each field type:

	Field Types			
	String	Number	Date (abridged - illustrative)	Selection List
<b>Filter Types</b> →	Equals Does not equal Starts with Ends with Contains Does not contain	Equals Does not equal Less than Less than or equal Greater than Greater than or equal Between	Today This week This month This quarter This year This fiscal year Through this week Through last week Next 30 days Custom – Equals Custom – Between Custom – Greater Than	In Not In

### Advanced Search Save Screen

The *Advanced Search Save* screen is displayed when the user chooses the *Save* or *Save As* option from the *Save*  icon on the *Advanced Search List* screen.



Name / Label	Description
Name	When saving a new advanced search, allows the user to specify its name. When saving changes to an existing search, allows them to rename the search by changing the value.
Shared With User	Provides a drop-down list allowing the user to choose one or more other users with whom to save the advanced search. Once they have shared it, those users will be able to pull up that search list. In their list of named searches, the creator's name <sup>a</sup> will be displayed next to search list name. The user with whom the list was shared will not be able to modify the list definition, but they can use it as the basis for creating new named advanced searches.



Name / Label	Description
Shared With Role	<p>Provides a drop-down list allowing users to choose one or more roles with whom to save the advanced search. Once they have shared it, the users in those roles will be able to pull up the search list. In their list of named searches, the creator's name<sup>a</sup> will be displayed next to the search list name. The user with whom the list was shared will not be able to modify the list definition, but they can use it as the basis for creating new named advanced searches.</p> 
Page Size	<p>The records returned in the search list are divided into scrollable pages. This field allows the user to specify how many items are displayed on each page by dragging the blue box within the bar. Controls are provided on the <a href="#">Search List screen</a> to move between pages as shown<sup>b</sup>. Aspire also shows which items<sup>c</sup> are displayed on the current page. On each page, the user can scroll through the items using the scroll bar. The maximum number of records that can be returned on each page is 500.</p> 
My Default	<p>Checking this box allows the user to make the advanced search their individual default for the current search list. The next time they log into Aspire and go to that search list, the default advanced search will be displayed. When they click this checkbox and save, the advanced search replaces the prior default.</p>
Save Icon	<p> Saves the advanced search and returns to the search list.</p>
Back Icon	<p> Returns to the search list without saving the advanced search.</p>