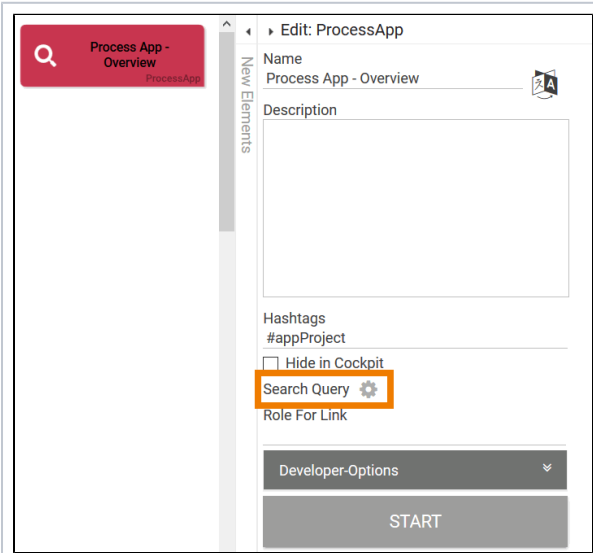


Setting Search Filters Using Search Query

In many application scenarios, the user shall not see all instances in the overview. For example, users with a particular role should only see the current worklist of their department or even their personal worklist. To do this, the instances in the instance table must be provided with a filter.



The two overview elements

- [Process App - Overview](#)
- [Mobile App - Overview](#)

contain the property **Search Query**, which can be found in the Edit Sidebar of both elements.

A click on the gear wheel opens the search query editor.

On this Page:

- [General Search Filters](#)
- [Setting Search Filter for Roles](#)
- [Filtering on a Process Step](#)
- [Individual Search Filter](#)
- [Combining Filter Expressions](#)

Related Pages:

- [EPC Elements](#)
 - [Process App - Overview](#)
 - [Mobile App - Overview](#)
- [Role-based Authorization Concept](#)
- [Service](#)
 - [Procurement Process](#)

Search Query Process App - Overview

SAVECANCEL

Define your filter in this editor - it must contain a valid JSON object. For syntax information, see [General Search Filters](#).

Store your input with **Save** or exit the editor by clicking **Cancel**.

!

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General Search Filters

A search filter can generally be set for each **Overview**, even for apps without an authorization check. For each [Process App - Overview](#) or [Mobile App - Overview](#) you can define your own filter expression, which is saved in the **Search Query** property of the element.

Filter	Example Query	Example Results
Variable or fixed value	{ "Name" : "Adler" }	All instances with content Adler in field Name are displayed.

Process Step meta. currentStep. processStepName	<pre>{ "meta.currentStep. processStepName": "Checking request" }</pre>	All instances currently positioned in the process step Checking request are displayed.
	<pre>[{ "meta.currentStep. processStepName": "Informing Approver" }, { "meta.currentStep. processStepName": "Checking request" }, { "meta.currentStep. processStepName": "Show summary" }]</pre> <p>You can also use the following option:</p> <pre>[{ "meta.currentStep. processStepName": { "in": ["Informing Approver", "Checking request", "Show summary"] } }]</pre> <div data-bbox="350 848 688 961">  Further informations can be found at page Using Meta Information. </div>	All instances positioned in the process steps Informing approver , Checking request and Show summary are displayed.
Parallel Process Step meta. parallelBranches. currentStep. processStepName	For steps within an AND branching you have to use meta.parallelBranches.currentStep.processStepName : <pre>{ "meta.parallelBranches. currentStep. processStepName": "Checking request" }</pre>	All instances positioned in the process step Checking request are displayed.
Combination of multiple filter expressions	<pre>{ "Name": "Adler", "Order Value": { "<=": "150" } }</pre>	All orders with a maximum value of 150 placed by the employee Adler are displayed.
Query for unequal	<pre>{ "meta.currentStep. processStepName": { "!=": " Sending rejection mail" } }</pre>	Show all process steps except Sending rejection mail .



Comments are **not** possible in the search query editor. If you want to disable a filter expression during the test phase, remove the line in the editor.

Setting Search Filter for Roles

In role-based apps, users should generally not be allowed to view all instances created in an **Overview**, but only a selection of instances.

Application examples are:

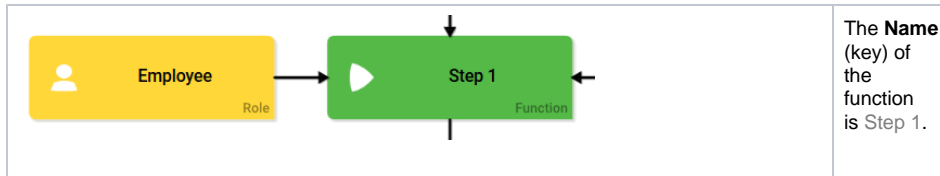
- Instances in a particular process step.
- Instances created by the current user.
- Instances created by a particular department.



In the filter expression of the search query you will need to specify the **name** of the [Function](#).

Since translations can be stored for a function, the unique **key** (= **name** of the EPC element **Function**) must always be used in the search query.

Example: Use of the Key **Step 1**



Edit: Function

Name
Step 1

Description

Hashta

Role Ri

☐ Che

Translations

Name
Step 1

Element Translations

	Translation
de	Bestellung anlegen
en	Creating request
es	
fr	
pt	
tr	

For the element Step 1, translations have been saved:

- de:** For German-speaking users the function is displayed with label Bestellung anlegen.
- en:** The label for English-speaking users is Creating request.

The correct filter expression for the search query must be:



- ```
{
 "meta": {
 "currentStep": "Step 1"
 }
}
```

## Filtering on a Process Step

In projects it is often the case that users should only see the instances in an overview for which they are authorized. In these cases, you can filter on the process steps the user is authorized to execute.

**Example:** Filtering for the process step **Checking request**

In ACME's Procurement process, the head of accounting has to approve procurement requests if the order exceeds a specified budget. So Eliza Doolittle, ACME's head of accounting, needs only to see the instances in process step **Checking request**. During modeling, Irene Adler therefore creates an overview element only for the head of accounting, filtering the instances on process step **Checking request**.

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                         |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <div data-bbox="157 296 735 829"><div><div>Procurement Requests Waiting for Approval</div><div>ProcessApp</div></div><div><div>New Elements</div><div><div>Edit: ProcessApp</div><div><div>Name</div><div>Procurement Requests Waiting for Appi</div></div><div><div>Description</div><div>Query lists all instances in step "Checking request"</div></div><div><div>Hashtags</div><div></div></div><div><div><input type="checkbox"/> Hide in Cockpit</div><div>Search Query </div><div>Role For Link</div><div>head_accounting</div></div><div>Developer-Options</div><div>START</div></div></div></div> | <p>In the Procurement app project, the process app element Procurements Requests Waiting for Approval is selected. Irene Adler opens the <b>Search Query</b> option in the properties of the element by clicking on the gear wheel.</p> |
| <div data-bbox="157 1033 735 1176"><div>Search Query Procurement Requests Waiting for Approval</div><div><div>1</div><div><div>["meta.currentStep.processStepName": "Checking request"]</div></div></div><div><div>SAVE </div><div>CANCEL</div></div></div>                                                                                                                                                                                                                                                                                                                                              | <p>Irene enters the necessary filter expression in the Search Query Editor:</p> <pre>{ "meta.currentStep.processStepName": "Checking request" }</pre>                                                                                   |

## Procurement Requests Waiting for Approval



After saving, the search query is applied to the instances in the overview element. The counter of the tile now shows all instances that are currently in step **C** **checking request**.

Accordingly, filter expressions can also be stored for other Overview elements:

- { "meta  
 .  
 currentStep.  
 processStepName  
 ":  
 "Creating request"  
 }
- { "meta  
 .  
 currentStep.  
 processStepName  
 ":  
 "Configuring delivery"  
 }
- ...

Procurement Requests

Filters

Request Number

Name

Creation Date

Department

Create New Request

Request Table

|                          | Request Number | Creation Date | Name        | Department | Type of Request | Order Value | Status           |
|--------------------------|----------------|---------------|-------------|------------|-----------------|-------------|------------------|
| <input type="checkbox"/> | 156923748625   | 2019 Sep 23   | John Watson | Production | New             | 337.29      | Checking request |
| <input type="checkbox"/> | 1571649001635  | 2019 Oct 21   | Irene Adler | Management | New             | 409.80      | Checking request |
| <input type="checkbox"/> | 1571659238506  | 2019 Oct 21   | Irene Adler | Management | New             | 182.88      | Checking request |
| <input type="checkbox"/> | 1571659294228  | 2019 Oct 21   | Irene Adler | Management | New             | 99.49       | Checking request |

When Eliza Doolittle now clicks on the tile Procurement Requests Waiting for Approval, in the overview table only instances currently stored in process step Checking request are displayed.

Procurement Process

ACME Procurement Process

Create Procurement Request

Procurement Requests Waiting for Approval

Procurement Requests Delivery Overview

As a result, a user with different roles is shown different instances. A refresh in the cockpit is required (F5 key) once for a running session if new queries have been defined.

Example:

In her role as approver, Eliza Doolittle has access to the tile Procurement Requests Waiting for Approval. The tile counter indicates that there are currently four requests waiting for approval.



|  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|--|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | <p>In addition to her role as approver, the head of accounting is also an employee and must be able to order her own office supplies using the procurement app. Therefore Eliza has also access to the tile Create Procurement Request.</p> <p>In order to be able to check the receipt of her own purchase orders, Eliza has also created the tile Procurement Requests Delivery Overview in the cockpit. The counter of this tile indicates that two of her orders have been received.</p> |
|--|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

## Individual Search Filter

Individual filters adapt to the logged in user. If the active user is only to be shown instances that he has created himself, it is advisable to use an individual search filter.

For an individual filter, you access the data of the BPaaS user object. This object contains personal information about the registered BPaaS user, including his name and email address. The syntax to access the content of the user object is **#user.nameOfAttribute#**.

**Example:** Filter for the logged in user

Irene Adler wants to configure the overview of ACME's Procurement app in a way that each employee is only able to see his or her own requests.

## Procurement Requests

### Filters

Request Number

Name

Creation Date

Department

Create New  
Request

### Request Table

| <input type="checkbox"/> | Request Number | Creation Date | Name              | Department | Type of Request | Order Value | Status              |
|--------------------------|----------------|---------------|-------------------|------------|-----------------|-------------|---------------------|
| <input type="checkbox"/> | 156708049422   | 2019 Aug 29   | Irene Adler       | IT         | New             | 59.99       | Showing order summ  |
| <input type="checkbox"/> | 1567672991535  | 2019 Sep 05   | Irene Adler       | Management | New             | 131.48      | Showing order summ  |
| <input type="checkbox"/> | 1567747515470  | 2019 Sep 06   | John Watson       | Production | New             | 32.87       | Showing order summ  |
| <input type="checkbox"/> | 1567747605404  | 2019 Sep 06   | Eliza Doolittle   | Accounting | New             | 58.90       | Showing order summ  |
| <input type="checkbox"/> | 1567747726242  | 2019 Sep 06   | Henry Higgins     | Marketing  | New             | 32.56       | Showing order summ  |
| <input type="checkbox"/> | 1567747836533  | 2019 Sep 06   | David Copperfield | Sales      | New             | 42.00       | Showing order summ  |
| <input type="checkbox"/> | 1569223389771  | 2019 Sep 23   | Jane Marple       | IT         | New             | 45.45       | Showing order summ  |
| <input type="checkbox"/> | 1569223748625  | 2019 Sep 23   | John Watson       | Production | New             | 337.29      | Checking request    |
| <input type="checkbox"/> | 1569223832349  | 2019 Sep 23   | Leopold Bloom     | Purchasing | New             | 65.98       | Confirming delivery |
| <input type="checkbox"/> | 1571649001635  | 2019 Oct 21   | Irene Adler       | Management | New             | 409.80      | Checking request    |
| <input type="checkbox"/> | 1571649101804  | 2019 Oct 21   | John Watson       | Production | Substitute      | 89.99       | Confirming delivery |
| <input type="checkbox"/> | 1571649283266  | 2019 Oct 21   | Henry Higgins     | Marketing  | New             | 26.10       | Showing order summ  |
| <input type="checkbox"/> | 1571659258506  | 2019 Oct 21   | Irene Adler       | Management | New             | 182.88      | Checking request    |
| <input type="checkbox"/> | 1571659294228  | 2019 Oct 21   | Irene Adler       | Management | New             | 99.49       | Checking request    |

⌕

Page 1 of 1

View 1-14 of 14

Without filtering, however, all orders are displayed in the Procurement Requests Overview.

ACME Procurement Request

Request Number

1571811494723

Creation Date

2019 Oct 23

Currently edited by

Irene Adler

Applicant Details

Name

Irene Adler

Type of Request

☒ New

☐ Substitute

☐ Other

E-Mail

Irene.adler@acme-corp.com

if "Other", please specify:

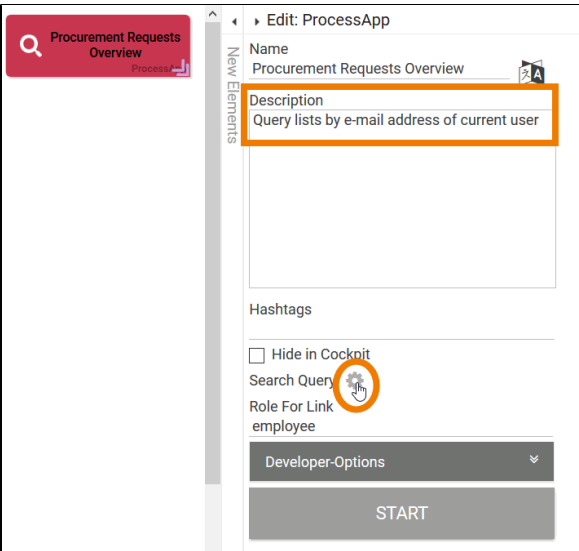

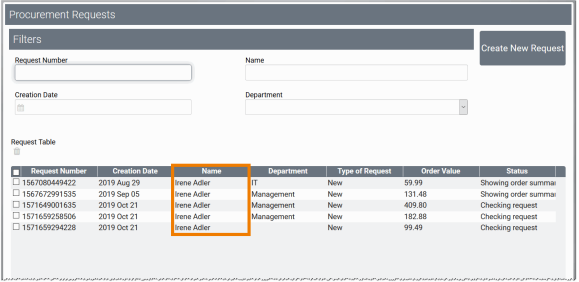
Department

In the app's input form, Irene inserted an input field for the user's email:

- The Name of the field is E-Mail.
- The Field Name in Container of the field is procurementEmail.

The user should fill this field with his or her email address. This information is also available in the user object.

In order to display only the instances of the current user, Irene wants to check whether the input in form field E-Mail corresponds with the email stored in the user object.

|                                                                                     |                                                                                                                                                                                                            |
|-------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | <p>In the Procurement app project, Irene selects the start link Procurement Requests Overview. She opens the <b>Search Query</b> option in the Edit Sidebar.</p>                                           |
|    | <p>Irene enters the necessary filter expression to compare the data stored in the email input field with the email address stored in the user object:</p> <pre>{ "procurementEmail" : #user.email# }</pre> |
|  | <p>The filter applies to the overview. Now only instances created by the logged in user Irene Adler are displayed.</p>                                                                                     |

If the additional data in the user administration is maintained accordingly, you could also use the user object's content to filter for all instances that were created by a particular department of the company. The syntax would be **#user.department#** in that case.

## Combining Filter Expressions

It is also possible to combine different content of the user object for a filter. Depending on the filter used, an AND or OR search is executed.

### Search Query without Filter

Procurement Requests

Filters

Request Number

Name

Creation Date

Department

Create New Request

Request Table

|                          | Request Number | Creation Date | Name              | Department | Type of Request | Order Value | Status              |
|--------------------------|----------------|---------------|-------------------|------------|-----------------|-------------|---------------------|
| <input type="checkbox"/> | 1567088449422  | 2019 Aug 29   | Irene Adler       | IT         | New             | 59.99       | Showing order summr |
| <input type="checkbox"/> | 1567672991535  | 2019 Sep 05   | Irene Adler       | Management | New             | 131.48      | Showing order summr |
| <input type="checkbox"/> | 1567747515470  | 2019 Sep 06   | John Watson       | Production | New             | 32.87       | Showing order summr |
| <input type="checkbox"/> | 1567747605404  | 2019 Sep 06   | Eliza Doolittle   | Accounting | New             | 58.90       | Showing order summr |
| <input type="checkbox"/> | 1567747726242  | 2019 Sep 06   | Henry Higgins     | Marketing  | New             | 32.56       | Showing order summr |
| <input type="checkbox"/> | 1567747836533  | 2019 Sep 06   | David Copperfield | Sales      | New             | 42.00       | Showing order summr |
| <input type="checkbox"/> | 1569223589771  | 2019 Sep 23   | Jane Marple       | IT         | New             | 45.45       | Showing order summr |
| <input type="checkbox"/> | 1569223748625  | 2019 Sep 23   | John Watson       | Production | New             | 337.29      | Checking request    |
| <input type="checkbox"/> | 1569223832349  | 2019 Sep 23   | Leopold Bloom     | Purchasing | New             | 65.98       | Confirming delivery |
| <input type="checkbox"/> | 1571649001635  | 2019 Oct 21   | Irene Adler       | Management | New             | 409.80      | Checking request    |
| <input type="checkbox"/> | 1571649101804  | 2019 Oct 21   | John Watson       | Production | Substitute      | 89.99       | Confirming delivery |
| <input type="checkbox"/> | 1571649283266  | 2019 Oct 21   | Henry Higgins     | Marketing  | New             | 26.10       | Showing order summr |
| <input type="checkbox"/> | 1571659258506  | 2019 Oct 21   | Irene Adler       | Management | New             | 182.88      | Checking request    |
| <input type="checkbox"/> | 1571659294228  | 2019 Oct 21   | Irene Adler       | New        | New             | 99.49       | Checking request    |

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**Result:**  
All instances are shown.

## AND Search

Procurement Requests

Filters

Request Number

Name

Creation Date

Department

Create New Request

Request Table

|                          | Request Number | Creation Date | Name        | Department | Type of Request | Order Value | Status              |
|--------------------------|----------------|---------------|-------------|------------|-----------------|-------------|---------------------|
| <input type="checkbox"/> | 1567672991535  | 2019 Sep 05   | Irene Adler | Management | New             | 131.48      | Showing order summr |
| <input type="checkbox"/> | 1571649001635  | 2019 Oct 21   | Irene Adler | Management | New             | 409.80      | Checking request    |
| <input type="checkbox"/> | 1571659258506  | 2019 Oct 21   | Irene Adler | Management | New             | 182.88      | Checking request    |

## Query Syntax

```
{

 "proc
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 ":
 #user
 .
 depar
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 #
}
```

**Result:**  
All instances that match both email address and department of the current user are displayed.

## OR Search

Procurement Requests

Filters

Request Number

Name

Creation Date

Department

Create New Request

Request Table

|                          | Request Number | Creation Date | Name        | Department | Type of Request | Order Value | Status              |
|--------------------------|----------------|---------------|-------------|------------|-----------------|-------------|---------------------|
| <input type="checkbox"/> | 1567080449422  | 2019 Aug 29   | Irene Adler | IT         | New             | 59.99       | Showing order summr |
| <input type="checkbox"/> | 1567672991535  | 2019 Sep 05   | Irene Adler | Management | New             | 131.48      | Showing order summr |
| <input type="checkbox"/> | 1571649001635  | 2019 Oct 21   | Irene Adler | Management | New             | 409.80      | Checking request    |
| <input type="checkbox"/> | 1571659258506  | 2019 Oct 21   | Irene Adler | Management | New             | 182.88      | Checking request    |
| <input type="checkbox"/> | 1571659294228  | 2019 Oct 21   | Irene Adler |            | New             | 99.49       | Checking request    |

Query

Syntax

```
[
 {
 "procurementEmail":
 #user
 .
 email
 #},
 {
 "procurementDepartment":
 label
 " :
 #user
 .
 department
 #}
 }
]
```

**Result:**  
All instances matching either email address or department of the current user are displayed.