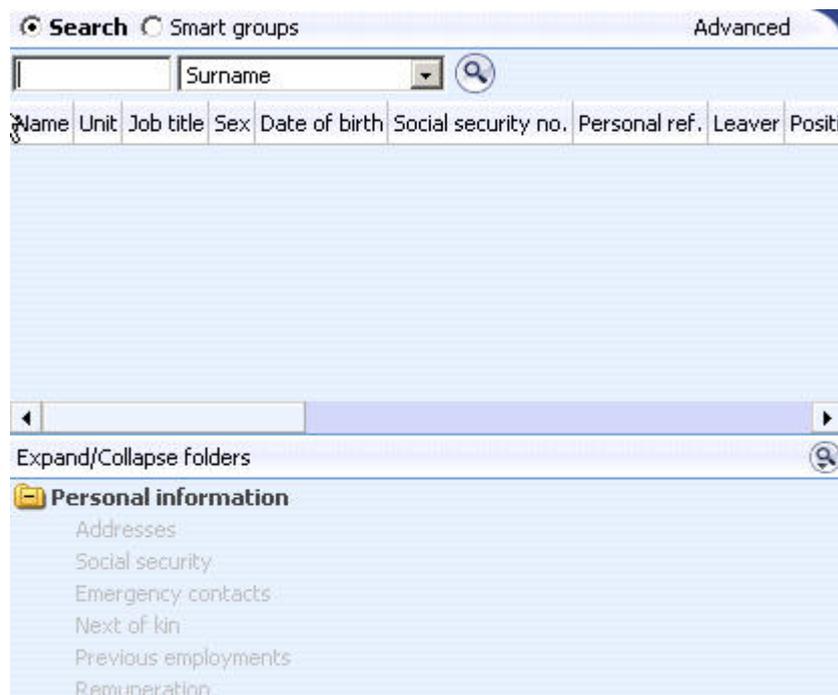


5 Search

A search page can be displayed in either the Action pane or, if the search was initiated from a page, it will slide in from the right. You can perform a Simple Search or an Advanced Search. If you use an advanced search you can save the criteria that you used and then re-use the search again at a later time by selecting a Smart Group. A Smart Group is simply a saved search.

5.1 Simple Search



In most searches you will have one text box to enter your search criteria and next to it there will be a condition. In the example shown you are searching for a name and the name is to be found in the Surname field. The drop-down list next to Surname will show you the alternative fields that are available for this search (E.g. Forename, Job Title, NI Number, Org Unit etc)

Enter a value into the Search box and press the Enter key or click the Search icon  to perform a 'simple' search.

Note that the default search uses the text that you enter in a 'starts with' search not as a 'contains' search.

If you want to perform a 'contains' search place an asterisk (*) at the beginning of the string.

Trent will perform the search and display the results in the Action pane.

Search Smart groups Advanced

abb Surname Results 10 People

Select all Save this group

Name	Unit	Job title	Sex	Date of birth	Social security no.	Personal
Abbott, Alexandra	P-Pensioners	WOOLEY, J.	Female	19/02/1938	ZRTY875748B	X942880
Abbott, Kate	P-Pensioners	SQUIRES, M. J.	Female	02/06/1935	ZLEQ319964E	X953635
Abbott, Louise	P-Pensioners	JENKINS, D. M.	Female	25/05/1922	LWMT677215T	X226460
Abbott, Michelle	P-Pensioners	DYE, J.	Female	25/04/1943	ZABM858466R	X126142
Abbott, Nathalie	P-Pensioners	JONES, T. Z.	Female	22/04/1945	WMXC618848X	X259198
Abbott, Pauline	P-Pensioners	PETTIT, M. P.	Female	09/11/1930	LRJN348983U	X819676
Abbott, Philis	P-Pensioners	GRAY, A.	Female	03/07/1936	ZMCC158123Y	X552415
Abbott, Samantha	P-Pensioners	MILLER, J.	Female	27/09/1944	ZYEN893663L	X368353
Abbott, Tilly	P-Pensioners	HOBBS, B.	Female	08/08/1927	HHJZ326515D	X103783

Search item = abb

Returns 10 people whose surname starts with 'abb'

Search Smart groups Advanced

*man Surname Results 47 People

Select all Save this group

Name	Unit	Job title	Sex	Date of birth	Social security no.
Chapman, Edward	P-Pensioners	WOODWARD, J. M. A.	Male	18/12/1938	ZXXA424222T
Chapman, Eric	P-Pensioners	SMITH, C. H.	Male	20/12/1938	ZTSS871972Q
Chapman, Gerald	P-Pensioners	PAYNE, B. D.	Male	02/02/1936	ZMRD445653E
Chapman, Melvin	P-Pensioners	SPONG, E. R.	Male	15/11/1935	ZMVU627298B
Chapman, Oliver	P-Pensioners	BLOOR, A.	Male	27/06/1924	RMEH495756L
Chapman, Roderick	P-Pensioners	CULLUM, R. H.	Male	27/05/1922	CKNG489532A
Chapman, Toby	P-Pensioners	LONGOBARDI, A.	Male	15/08/1940	YBSM673432V
Lawman, Margaret	P-Pensioners	SCRIPPS, V.	Female	24/12/1941	ZYVW412529R
Lawman, Samantha	P-Pensioners	TOOGOOD, J. M.	Female	04/11/1935	ZMAD999399U

Search item = *man

Returns 47 people whose surname contains the text 'man'

Search Smart groups Advanced

Results 0 People

Name	Unit	Job title	Sex	Date of birth	Social security no.	Personal ref.	Leaver	Position referer
------	------	-----------	-----	---------------	---------------------	---------------	--------	------------------

Search item =
abbot*

Returns no
items as an * at
the end of an
item is invalid.

When using this method of searching, the effective date is not a factor in the search; therefore should you search by surname, you may also find Pensioners who have been made a leaver (i.e. upon death). Using an Advanced search is a more accurate way of finding current Pensioners.

5.2 Advanced Search

A more detailed search can be performed by clicking the Advanced button

Search
 Smart groups
 Advanced

The Display pane will then display the Advanced search display where you can enter more complex conditions for your search.

Advanced Search:

Criteria Build special criteria

Starting date	is in last	3	months	- +
Sex	Female			- +

Match all of the search criteria

Output options

Generate batch

Save as smart group

For Trent For export

The drop down lists provide you with all the available fields and conditions which you can use.

Additional rows of conditions can be entered by clicking the plus icon . You can then specify whether you require All of the conditions to be matched (an 'and' condition) or Any of the conditions matched (an 'or' condition).

Rows can be removed from the condition by clicking the minus icon .

When your search conditions are complete you can click the Search button

Trent will perform the search and when complete it will display the results in the Object pane.

5.2.1 Special Criteria Searches

Complex advanced searches can be achieved using fields available on the Advanced Search page. These would be used where a combination of 'and' and 'or' conditions are needed.

Advanced Search:

Criteria

Build special criteria

Starting date	is in last	3	months	-	+
Sex	Female			-	+

Match **all** of the search criteria

Output options

Generate batch

Save as smart group

For Trent For export

Search

Start your advanced search as before building the list of search criteria as shown above (this example is taken from the Position search). When you wish to add another block of criteria that is to be used as either an 'and' or an 'or' condition, click the Build special criteria check box.

Advanced Search:

Criteria

Build special criteria

Starting date 3 months

Sex

Match of the search criteria

Output options

Generate batch

Save as smart group

For Trent For export

A new drop down list will appear where you can select to add the next criteria block as either an 'and' or an 'or'.

You can then add the additional criteria as before:

Advanced Search:

Criteria

Build special criteria

Starting date is in last 3 months - +

Sex Female - +

Match all of the search criteria

or

Organisation unit contains t - +

To add criteria block choose operator

Output options

Generate batch

Save as smart group

For Trent For export

Search

Further blocks of criteria can be added as required by clicking the 'To add criteria block choose operator' drop down list.

Advanced Search:

Criteria

Build special criteria

Starting date is in last 3 months

Sex Female

Match all of the search criteria

or

Organisation unit contains t

To add criteria block choose operator

Output options

Generate batch

Save as smart group

For Trent For export

Search

If you wish to remove a block click the Delete criteria below option which will appear in the drop down list after you have added a new block:

and

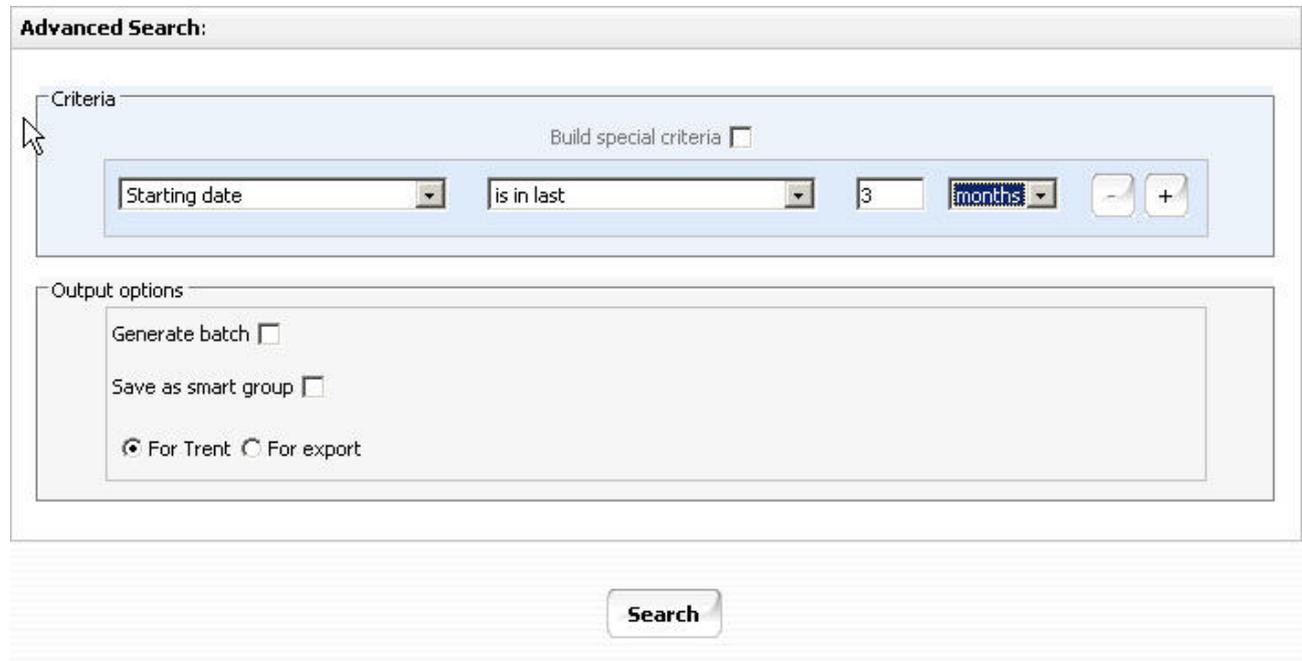
Delete criteria below

and

or

5.2.2 Date Searches

You can perform an advanced search against a date field and specify if it 'is in next' or 'is in last' as criteria for searching. For example:



Advanced Search:

Criteria

Build special criteria

Starting date [v] is in last [v] 3 [months] [v] [v]

Output options

Generate batch

Save as smart group

For Trent For export

Search

The 'is in next' and 'is in last' criteria allow you to specify a number followed by a drop down list that contains days, weeks, months and years to qualify the selection.

All advanced searches that act against a Unit, Post, Position, People or Costing will force the Effective date field, at the top of the Trent page to be enabled and active. Therefore all such searches will take this date into account when they are performed. You, therefore, need set this date before you start entering the Advanced search criteria.

5.3 Smart Groups

Within Search you can define and use Smart Groups. A Smart Group is the term used in Trent to refer to a list of records that can be retrieved time and time again without having to reconstruct the search criteria, i.e. a saved query. This feature allows you to organise your records into specific groups, which can be used again when performing tasks for that group of records. For example all new pensioners whose starting date is in the last 3 months. These can be sub-divided into Public and Private groups depending on whether the group is specific to you or may be used on a wider basis.

Advanced Search:

Criteria

Build special criteria

Starting date is in last months

Output options

Generate batch

Save as smart group Name

For Trent For export

To create a new Smart Group, enter your search criteria, check the Save as smart group box and enter a name for this saved search.

Once created, the group can be accessed at any time through the search options, by clicking the Smart groups radio button.

<input type="radio"/> Search <input checked="" type="radio"/> Smart groups Advanced					
All New group					
Smart group name	Output	Type	Access	Created by	Date created
Pensioners added in last 3 months	Trent	Dynamic	Public	NW123	15/03/2007
T Pensioners	Trent	Dynamic	Public	RM474	23/02/2007

Select the required group and each record that fits the criteria for the Smart group will be displayed

To edit a smart group, select the group and then choose edit this group.

<input checked="" type="radio"/> Search <input type="radio"/> Smart groups Advanced					
Surname [] Results 16 People					
Name	Unit	Job title	Sex	Date of birth	Social security no.
BOWEN, T	P-Pensioners	BOWEN, T. A.	Male	27/06/1942	[]
DOLIDZE, L	P-Pensioners	DOLIDZE, L.	Female	01/09/1946	[]
FORBES, V	P-Pensioners	FORBES, V. R.	Female	29/04/1944	[]
FREE, M	P-Pensioners	FREE, M. J.	Male	12/03/1948	[]
GURNEY, W	P-Pensioners	GURNEY, W. G.	Male	29/12/1943	[]
HAKE, F	P-Pensioners	HAKE, F. M. L.	Female	31/12/1946	[]
HOUGHTON, C	P-Pensioners	HOUGHTON, C. A.	Female	04/12/1946	[]
JENNINGS, B	P-Pensioners	JENNINGS, B. K.	Male	19/11/1928	[]
MILNE, J	P-Pensioners	MILNE, J. A.	Female	22/12/1946	[]
NUNES, J	P-Pensioners	NUNES, J. A.	Male	19/03/1949	[]

Smart group details: Pensioners added in last 3 months

Smart group name

Date generated 15/03/2007

Type Dynamic Fixed

Access Public Private

Criteria

Build special criteria

Starting date is in last months

Output options

Generate batch

For Trent For export

You can choose whether to make your smart group **dynamic** or **fixed**.

A dynamic Smart group is maintained by Trent and contains the records that meet the search criteria each time the smart group is accessed. When people no longer satisfy any of the included criteria, the dynamic smart group will be automatically updated to reflect the changes.

A fixed smart group is maintained manually and contains those records that met the search criteria at the time the smart group was first generated. Records can be removed at any time but you cannot add items to an existing fixed smart group

5.4 Exported output

An advanced search can be further enhanced by sending the output to a file using the Export radio button. The results can be sent to:

- HTML as Data
- HTML as a Report
- MS Word as Data
- MS Word as a Report
- MS Excel as Data
- CSV

When you specify an Advanced Search with the output going to a specific file type you also have the option to specify the fields to be used, thereby creating your own simple report.

When you click the specify fields option you will be shown all of the available fields and given the tools to build your own customised list.

Output options

Generate batch

Save as smart group

For Trent For export

Format: Specify fields

<ul style="list-style-type: none"> Organisation unit Job title Personal reference Leaver Position reference number Position occupancy reference 	<ul style="list-style-type: none"> ▶▶ ▶ ◀ ◀◀ 	<ul style="list-style-type: none"> Surname Forename Sex Date of birth Social security number
--	--	---

1 2

Primary sort descending

Secondary sort descending

Select the fields that you require from the left panel and use the buttons to copy them to the Selected list on the right.



Add all will move all the fields from the Available list to the selected list



Add selected will move just the highlighted item from the available list to the selected list



Remove selected will move just the highlighted item from the selected list to the available list



Remove all will move all the fields from the selected list to the available list

You have the option of sorting the output based on two fields. Highlight the main sort field and then click the  button which is displayed. The button and primary field will change to red. If required highlight the second sort field and then click the  button. The button and secondary

grouping c