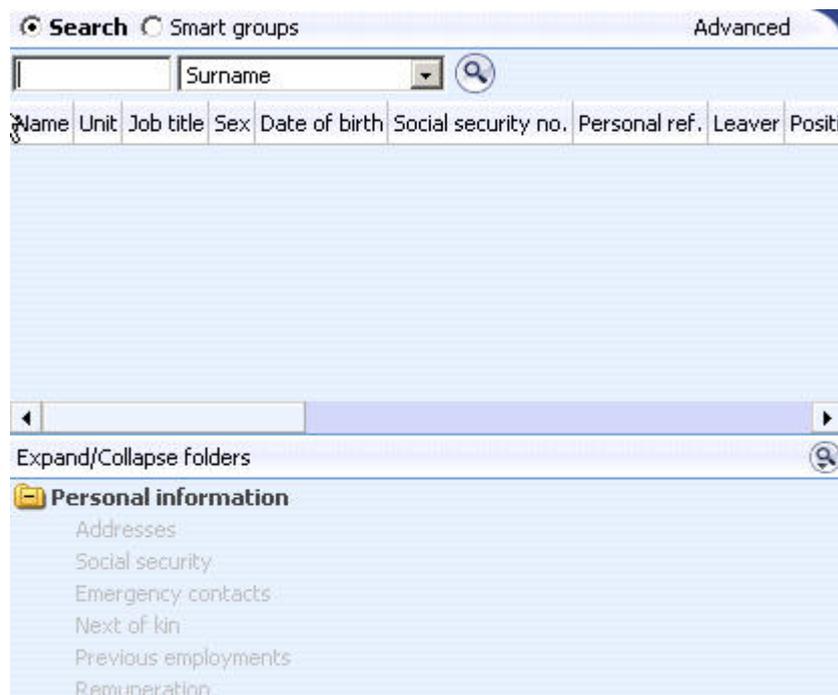# 5   Search

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 item = abb

Returns 10 people whose surname starts with 'abb'



Search item = *man

Returns 47 people whose surname contains the text 'man'

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

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

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.



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.

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:

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



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:
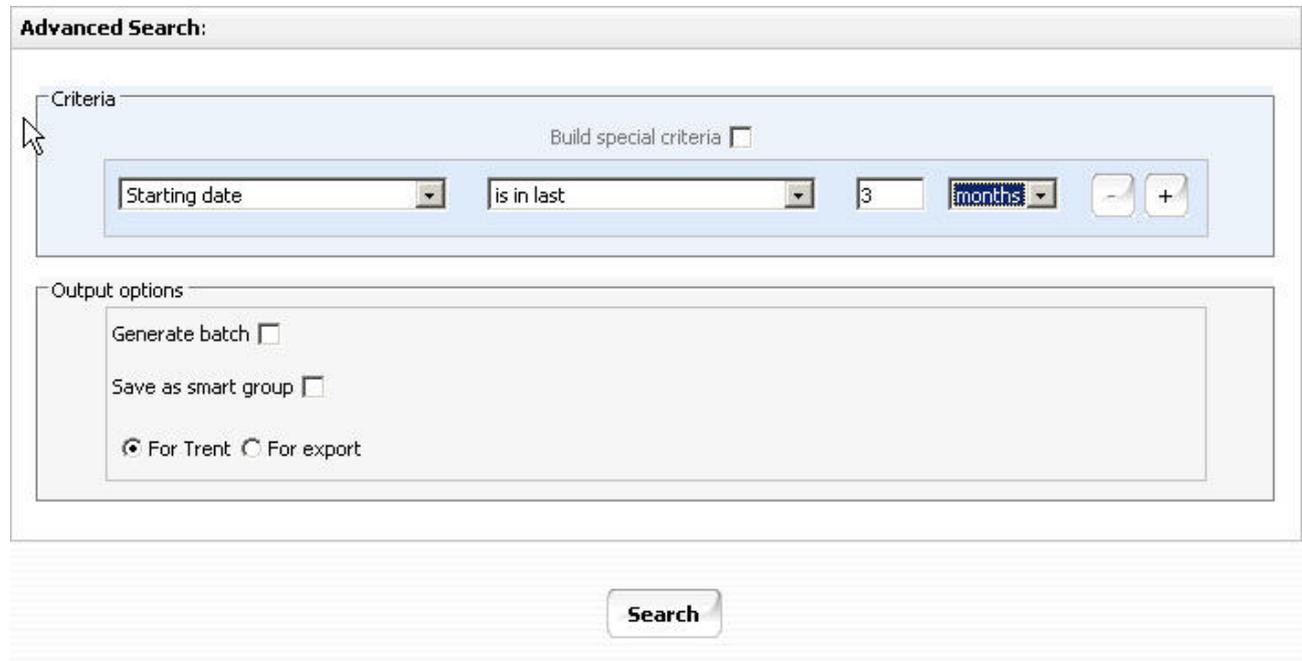
### 5.2.2  Date Searches

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:



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.



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.



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.

Smart group details: Pensioners added in last 3 months

| | |
|---|---|
| Smart group name | Pensioners added in last 3 months |
| Date generated | 15/03/2007 |
| Type | ⦿ Dynamic ◯ Fixed |
| Access | ⦿ Public ◯ Private |

Criteria

Build special criteria ☐

| Starting date ▾ | is in last ▾ | 3 | months ▾ | – + |

Output options

Generate batch ☐

⦿ For Trent ◯ For export

**Save**        **Delete**

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.



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

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◀ 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 1 button which is displayed.  The button and primary field will change to red.  If required highlight the second sort field and then click the 2 button.  The button and secondary

grouping c