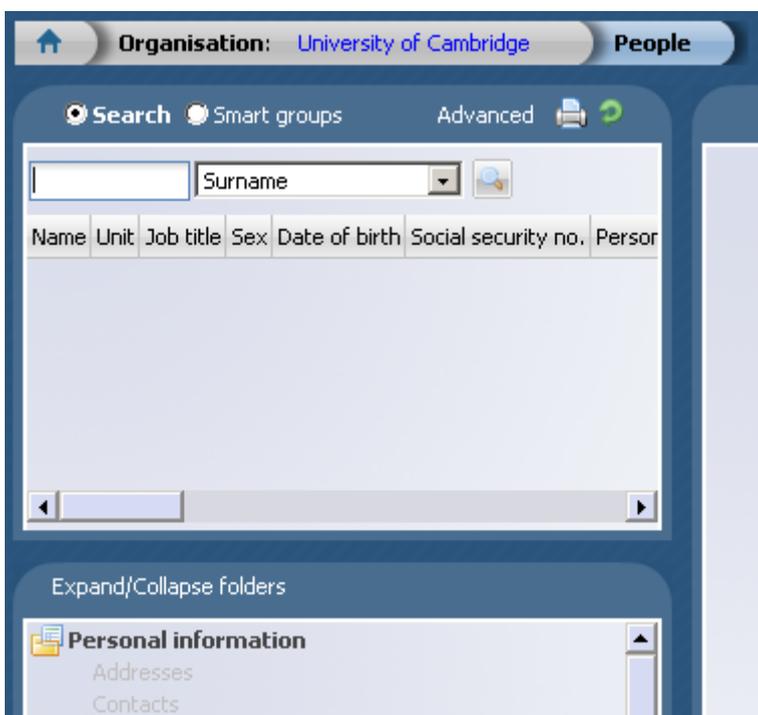


## 5 Search

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)

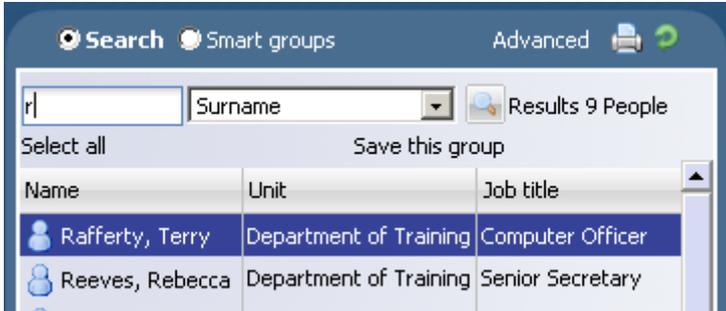
Enter a value into the Search box and press the Enter key or click the Search icon  to perform a 'simple' search.

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.

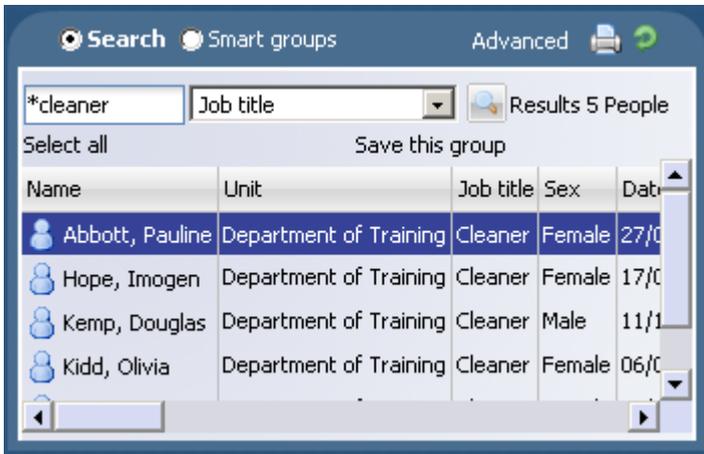
Particularly if you have departmental read only access, using an Advanced search is a more efficient way of finding current University employees within a specific School or Department.

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



Search item = R

Returns 9 people whose surname starts with 'R'.



Search item = \*cleaner

Returns 5 people whose job title contains the text 'cleaner'

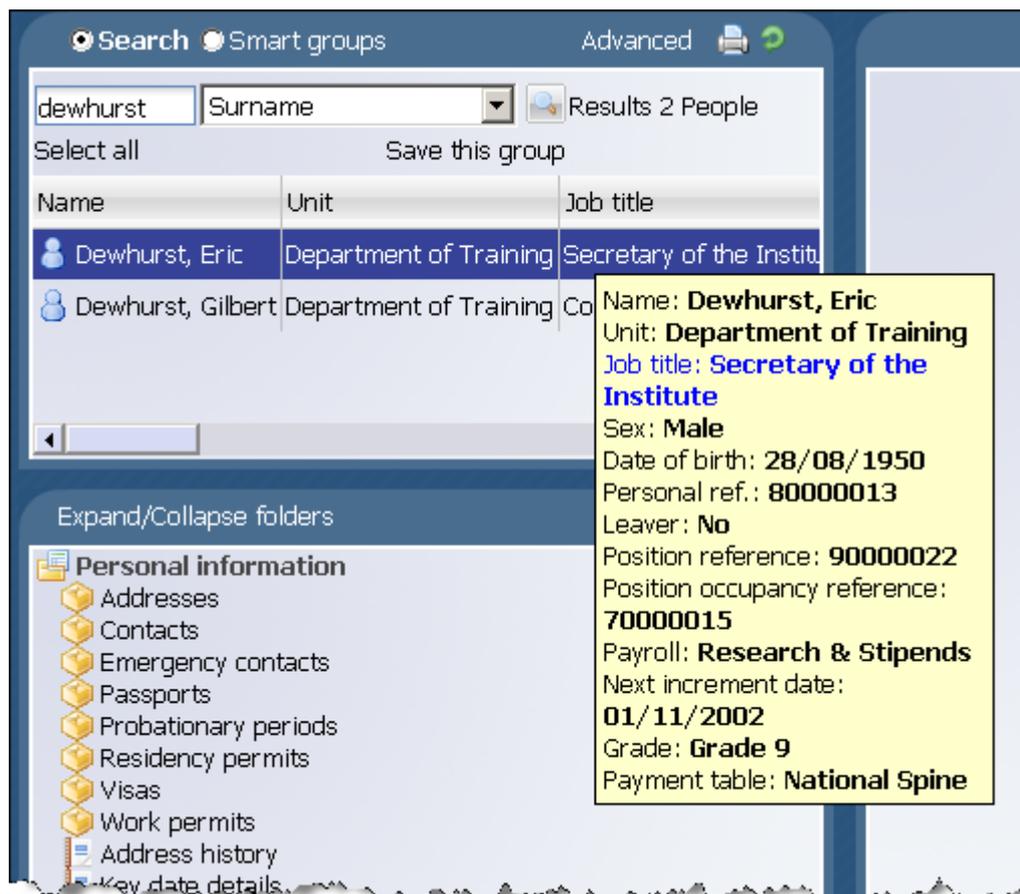


Search item = accounts\*

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

### 5.1.1 Search Tooltips

If 'Show Tooltip in Searches' has been set in User Settings, then whenever you move your cursor over a list of search data, iTrent will display information for the row in a pop up display.

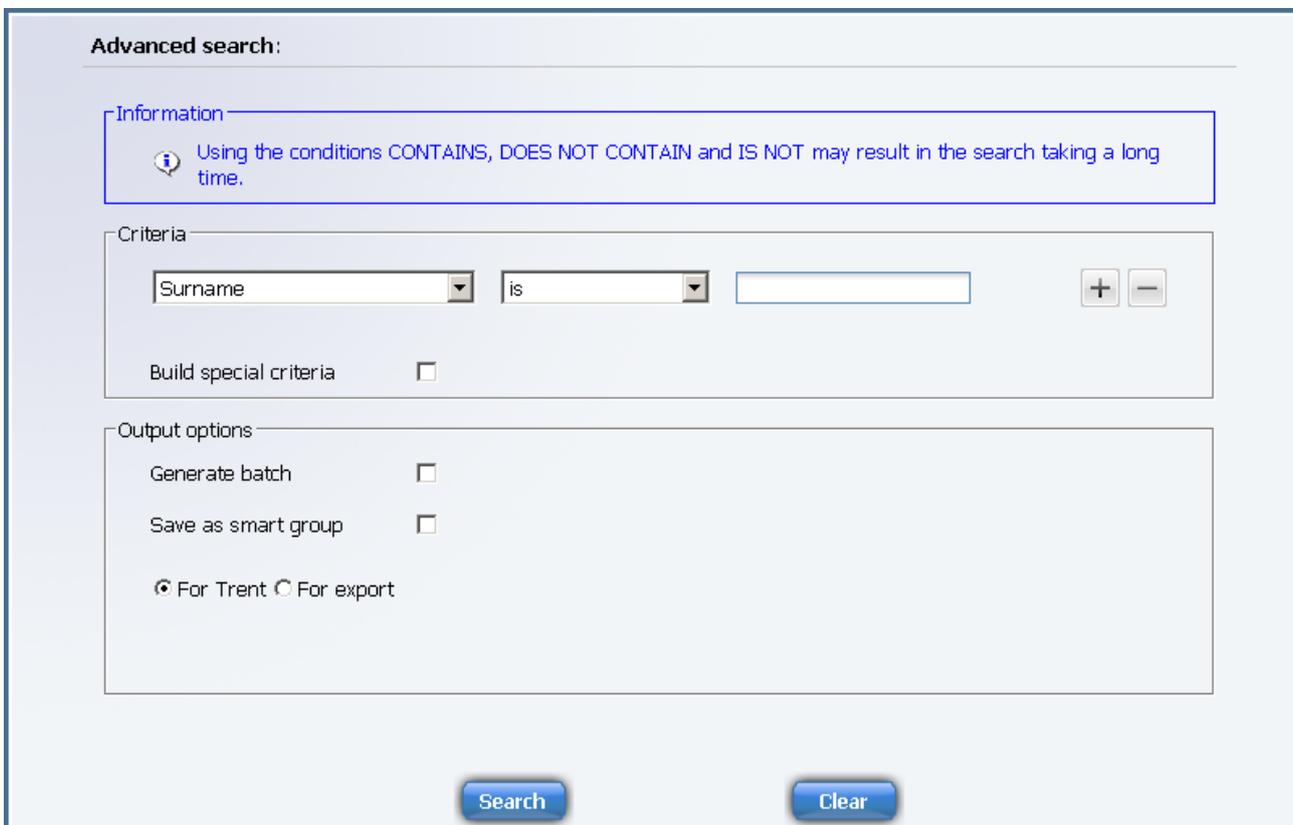


## 5.2 Advanced Search

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 'Advanced search' interface. It features an 'Information' box with a warning icon and text: 'Using the conditions CONTAINS, DOES NOT CONTAIN and IS NOT may result in the search taking a long time.' Below this is a 'Criteria' section with a dropdown menu set to 'Surname', a condition dropdown set to 'is', and an empty text input field. To the right of the text input are '+' and '-' icons. Below the criteria is a checkbox for 'Build special criteria'. The 'Output options' section includes checkboxes for 'Generate batch' and 'Save as smart group', and radio buttons for 'For Trent' (selected) and 'For export'. At the bottom are 'Search' and 'Clear' buttons.

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 

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

To clear your search criteria and start again, click the Clear button 

## 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.

The screenshot shows the 'Advanced search:' section of the CHRIS interface. It features an information box with a warning icon and text: 'Using the conditions CONTAINS, DOES NOT CONTAIN and IS NOT may result in the search taking a long time.' Below this is the 'Criteria' section, which contains two rows of search conditions. The first row has 'Organisation unit' selected in a dropdown, 'is' in another dropdown, and 'Department of Training' in a text input field, with '+' and '-' buttons to the right. The second row has 'Job title' selected, 'contains' in a dropdown, and 'Officer' in a text input field, also with '+' and '-' buttons. Below the criteria is a 'Match' dropdown set to 'all' and the text 'of the search criteria'. There is also a 'Build special criteria' checkbox which is currently unchecked. The 'Output options' section at the bottom contains three checkboxes: 'Generate batch' (unchecked), 'Save as smart group' (unchecked), and radio buttons for 'For Trent' (selected) and 'For export'.

Start your advanced search as before building the list of search criteria as shown above (this example is taken from the People 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.

**Information**

Using the conditions CONTAINS, DOES NOT CONTAIN and IS NOT may result in the search taking a long time.

**Criteria**

Organisation unit is Department of Training + -

Job title ends with Officer + -

Match all of the search criteria

Build special criteria

To add criteria block choose operator  
To add criteria block choose operator  
and  
or

**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:

**Criteria**

Organisation unit is department of training + -

Job title is advanced research fellow + -

Match all of the search criteria

or

Organisation unit is department of training + -

Job title contains marie curie + -

Match all of the search criteria

To add criteria choose operator

Build special criteria

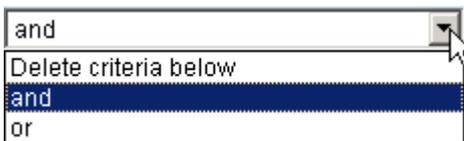
Click on the Search button to start the search, the results will be displayed in the object pane.

 Andrews, Jeremy	Department of Training	Marie Curie Researcher	Male	18/04/195
 Butcher, Jeremy	Department of Training	Marie Curie Fellow	Male	14/01/196
 Evans, Benjamin	Department of Training	Advanced Research Fellow	Male	08/02/195
 Landis, Robert	Department of Training	Advanced Research Fellow	Male	12/09/196
 Ogden, Sean	Department of Training	Marie Curie Researcher	Male	09/12/196

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

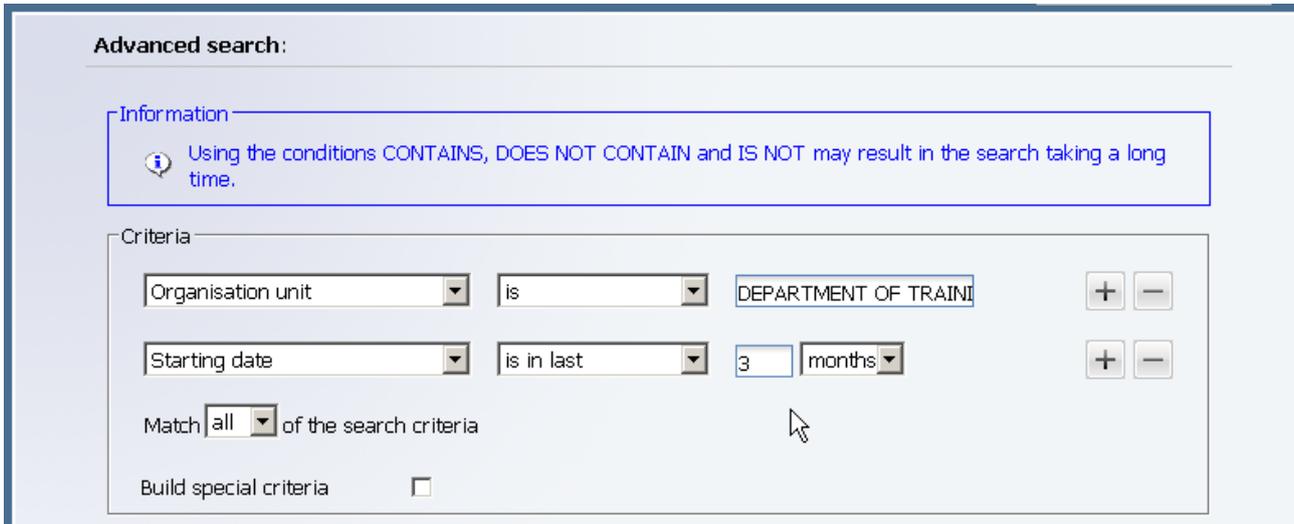


If you wish to remove a block click the Delete criteria below option which will appear in the drop down list after you have added a new block:



## 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:



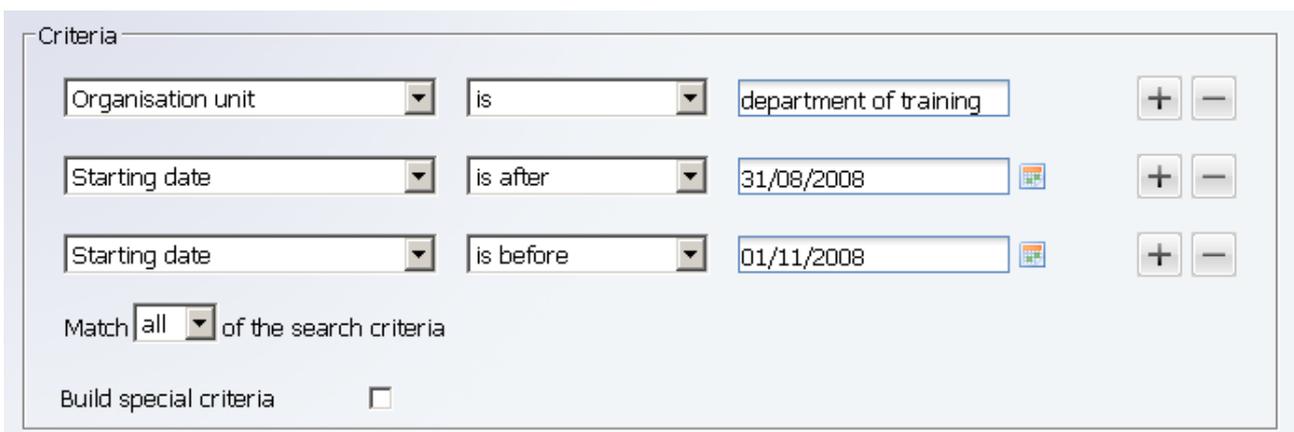
The screenshot shows the 'Advanced search' section of the CHRIS system. It features an 'Information' box with a warning icon and text: 'Using the conditions CONTAINS, DOES NOT CONTAIN and IS NOT may result in the search taking a long time.' Below this is the 'Criteria' section, which contains two search criteria:

- Organisation unit is DEPARTMENT OF TRAINI
- Starting date is in last 3 months

At the bottom of the criteria section, there is a 'Match all of the search criteria' dropdown menu and a 'Build special criteria' checkbox.

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.

To specify a date range use a combination of 'is after' and 'is before' criteria, for example:



The screenshot shows the 'Criteria' section of the CHRIS system, illustrating a date range search. It contains three search criteria:

- Organisation unit is department of training
- Starting date is after 31/08/2008
- Starting date is before 01/11/2008

At the bottom of the criteria section, there is a 'Match all of the search criteria' dropdown menu and a 'Build special criteria' checkbox.

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

## 5.3 Smart Groups

Within Search you can define and use Smart Groups. A Smart Group is the term used in iTrent 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 employees whose starting date is in the next 2 weeks. 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.

Criteria

Organisation unit	is	department of training	+	-
Leaving date	is in last	3 months	+	-

Match  of the search criteria

Build special criteria

Output options

Generate batch

Save as smart group

Access  Public  Private

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.



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:** department of training leavers

Smart group name

Date generated 31/10/2008

Type  Dynamic  Fixed

Access  Public  Private

**Information**

 Using the conditions CONTAINS, DOES NOT CONTAIN and IS NOT may result in the search taking a long time.

**Criteria**

Organisation unit	is	department of training	+	-
Leaving date	is in last	3 months	+	-

Match

Build special criteria

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

A dynamic Smart group is maintained by iTrent and contains the records that meet the search criteria each time the smart group is accessed. When people either join or leave an included unit, 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. Items 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 for export radio button.

The results can be sent to various applications by selecting the required format.

To display the criteria used in your advanced search with your exported data, click the display search criteria check box.

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: MS Excel (data)    Display search criteria

Specify fields

Available		Selected
Social security number	▶▶	Position reference number
Personal reference	▶	Surname
Leaver	◀	Organisation unit
Position occupancy reference	◀◀	Forename
Payroll		Job title
Previous surname		
HESA staff ID		

1 2

Primary sort descending

Secondary sort descending

Search    Export    Clear

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 **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 chosen will change to blue.



Click on the **Export** button to complete your search.