Searches

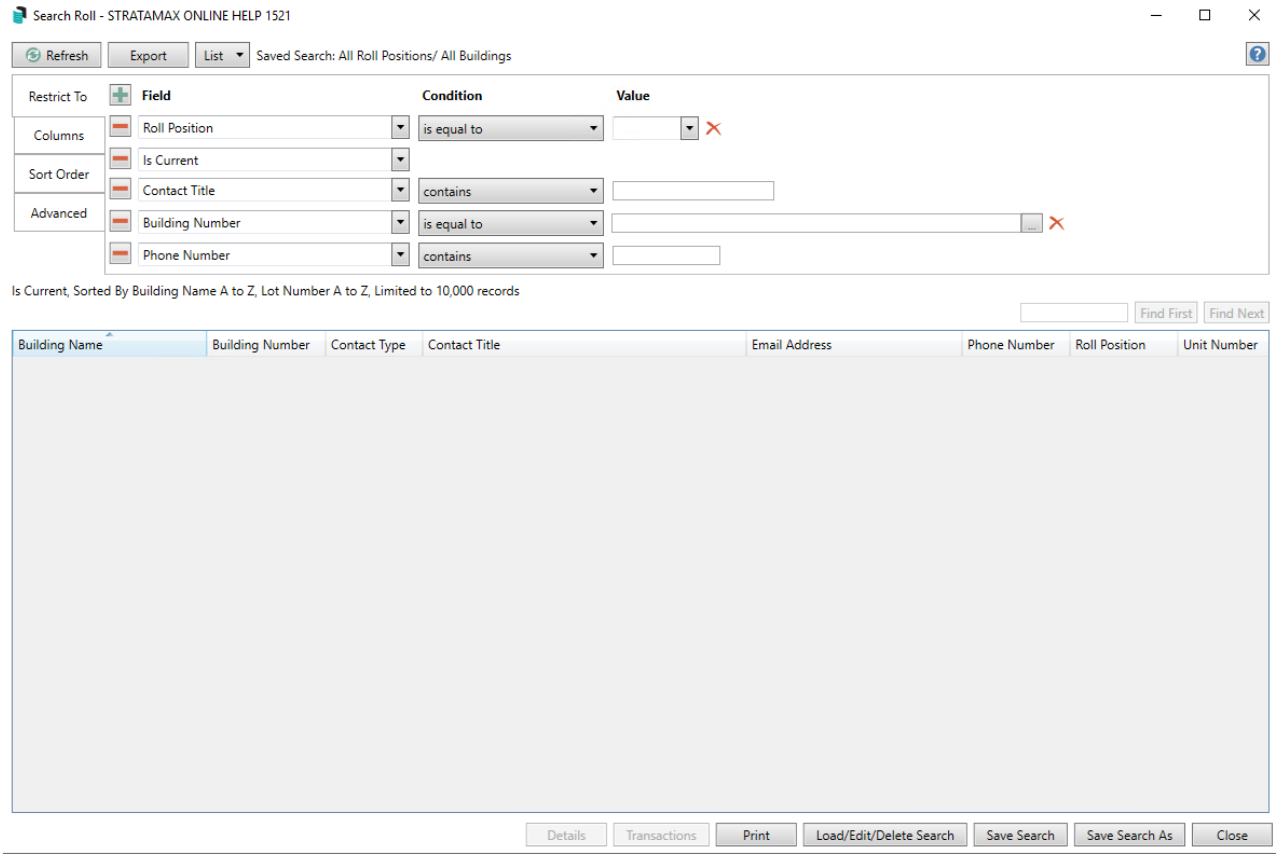
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In StrataMax, search screens provide a practical way to find, review, report, and export information across different areas of the system. These searches can assist with everyday tasks such as checking records, reviewing transactions, following up outstanding items, and preparing information for reporting.

All of the search screens use the same user interface, layout and tabs, even though each one reports on a different area of data. This provides a much easier user experience with uniform functionality. The *Column*, *Sort*, and *Advanced* areas are displayed when the search screen opens, making it easier to review and adjust the available search settings straight away.

Search basics

1. Open the required search screen.
2. The search screen will open with a table showing the records available for that search.
3. Use the *Restrict To, Columns, Sort Order* & *Advanced* tabs to set the restrictions, choose the columns to display, and control the sort order.
4. Click *Refresh* to apply any changes and display the updated results.
5. If required, click *Export* to export the current search results to Excel.
6. Use the *Find First* and *Find Next* options to locate a specific record in the results.
7. Depending on the search screen being used, additional buttons such as *Details*, *Transactions*, or *Report* may be available once a record is selected.
8. Once the search has been set up, click *Save Search As* to save it for later use.
9. Use *Load/Edit/Delete Search* to load a saved search, or to edit or delete an existing saved search.
10. If a saved search has been loaded and you make changes, click *Save Search* to save the updates to that search.
11. If required, click *Add Dashboard Item* to make the search available from the Dashboard.



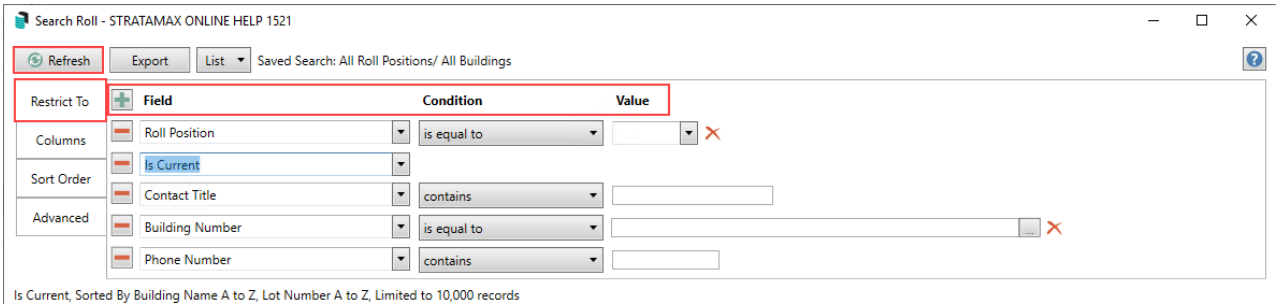
Restrict To

The *Restrict To* tab is used to define which records should be returned in the search results. This is where the search fields, conditions, and values are entered.

1. To add a restriction field, click the green *plus* button.
2. To remove a restriction field, click the red *minus* button.
3. Select the required option from the *Field* list.
4. Select the required option from the *Condition* list.
5. Enter or select the required *Value*.
6. Click *Refresh* to apply the restriction and update the results.

The available *Condition* and *Value* options will vary depending on the selected field. For example, date fields may provide date-based conditions, and some conditions may change or remove the value field depending on the option selected.

If required, the same field can be added more than once to apply different values or conditions in the one search. This can be helpful when refining results without needing to run separate searches.



Conditions

The *Condition* controls how the search compares the *Value* against each record. The list of conditions available will change depending on the field selected. For example, an amount field will provide numeric comparisons, while a date field will provide date-based options. Fields that can be left blank also offer *is empty* and *is not empty*. If a condition mentioned below is not visible, it is not available for that field.

Text fields

Fields that hold free text (for example *Building Name*, an address, or an email address) provide the following conditions:

Condition	Returns records where the field...
starts with	begins with the value
is in the range	falls between the two values entered
is equal to	matches the value exactly
is not equal to	does not match the value
contains	includes the value anywhere within it
does not contain	does not include the value anywhere

Text fields that can be left blank, such as email addresses and addresses, also provide *is empty* and *is not empty*, which can be helpful when searching for records with incomplete information.

List fields

Fields that hold a selectable list of options (for example *Account Manager*, *Status*, or *Unit Class*) provide *is equal to*, *is not equal to*, *is any of* and *is not any of*. Some list fields, such as *Account Manager* and *Status*, also provide *contains* and *does not contain*.

Condition	Returns records where the field...
is any of	matches any one of the selected values

is not any of	matches none of the selected values

For *is any of* and *is not any of*, click the *...* button next to the *Value*, tick the required values in the selection window, then click *Select*.

Number and amount fields

Fields that hold amounts or balances (for example *Invoice Amount* or *Outstanding*) provide the following conditions:

Condition	**Returns records where the amount...**
is equal to	matches the value exactly
is in the range	falls between the two values entered
is greater than	is more than the value
is less than	is less than the value
is greater than or equal to	is the value or more
is less than or equal to	is the value or less
is not equal to	is anything other than the value
is empty / is not empty	has no value recorded / has any value recorded

To search for amounts between two figures, use *is in the range* and enter both the lower and upper amounts. Fields that hold whole numbers or counts (for example *Number of Lifts* or *Id*) provide the same comparisons except *is not equal to*, *is empty* and *is not empty*.

Yes/No fields

Fields that record a Yes/No setting (for example *Current Building*, *Asbestos Present*, or *Audit Done (Last Year)*) have no condition to choose: the condition is always *is equal to*. Select *Yes* or *No* and click *Refresh*. Some Yes/No fields also offer *Not Set*, for records where no value has been recorded.

Date fields

Date fields (for example *Due Date*, *Date Issued* or *Taken On Date*) provide the following conditions:

Condition	**Returns records where the date...**
is equal to	is the date entered or selected
is in the range	falls between the two dates entered
is greater than / *is less than*	is after / before the date (not including it)
is greater than or equal to/ *is less than or equal to*	is on or after / on or before the date

is today / *is yesterday*	is today / is yesterday
is in the last 7 days / *is in the last 30 days*	falls within the last 7 or 30 days
is tomorrow, *is in the next 7 days*, *is in the next 30 days*	falls tomorrow, or within the next 7 or 30 days (only on dates that can be in the future, such as *TD Maturity Date*)

The 7 and 30 day conditions need no *Value*. For the other conditions, the *Value* can be set in one of two ways:

1. **Choose a set period.** The value list provides fixed periods: *Today*, *Yesterday*, *1 week in the past*, *2 weeks in the past*, *1 Month in the past*, *6 Months in the past* and *1 Year in the past*. Dates that can be in the future also offer *Tomorrow* and the matching periods *in the future*. These periods are calculated automatically from today's date each time the search is refreshed, which makes them ideal for saved searches that should always reflect the current period.
2. **Enter a specific date.** If the timeframe needed is not one of the set periods, tick *Specific Dates* and enter the exact date required.

Condition Examples

The examples below show how the conditions apply for the different field types when building a search.

Example 1: Work orders issued in the last month (set period)

1. Open ***Search Work Orders*** and in *Restrict To*, add the *Date Issued* field.
2. Set the *Condition* to *is greater than or equal to* and in the *Value* list, select *1 Month in the past*.
3. Click *Refresh*.

Because a set period is used, the saved search will always show the most recent month when refreshed. For the last 30 days exactly, the *is in the last 30 days* condition can be used instead.

Example 2: Levies due in the last five years (specific date)

1. Open ***Search Levies*** and in *Restrict To*, add the *Due Date* field.
2. Set the *Condition* to *is greater than or equal to*, tick *Specific Dates*, and enter the date five years ago.
3. Click *Refresh*.

Because five years is not one of the set periods, a specific date is used instead.

Example 3: Levies due within a date range (same field twice)

1. Open ***Search Levies*** and in *Restrict To*, add the *Due Date* field, set the *Condition* to *is greater than or equal to*, tick *Specific Dates*, and enter the start date.
2. Add the *Due Date* field again, set the *Condition* to *is less than or equal to*, tick *Specific Dates*, and

enter the end date.

3. Click *Refresh*.

Example 4: Creditor invoices between two amounts (is in the range)

1. Open ***Search Creditor Invoice Items*** and in *Restrict To*, add the *Invoice Amount* field.
2. Set the *Condition* to *is in the range* and enter the lower and upper amounts.
3. Click *Refresh*.

Example 5: Term deposits maturing in the next 30 days

1. Open ***Search Bank Accounts*** and in *Restrict To*, add the *TD Maturity Date* field.
2. Set the *Condition* to *is in the next 30 days*. No *Value* is needed.
3. Click *Refresh*.

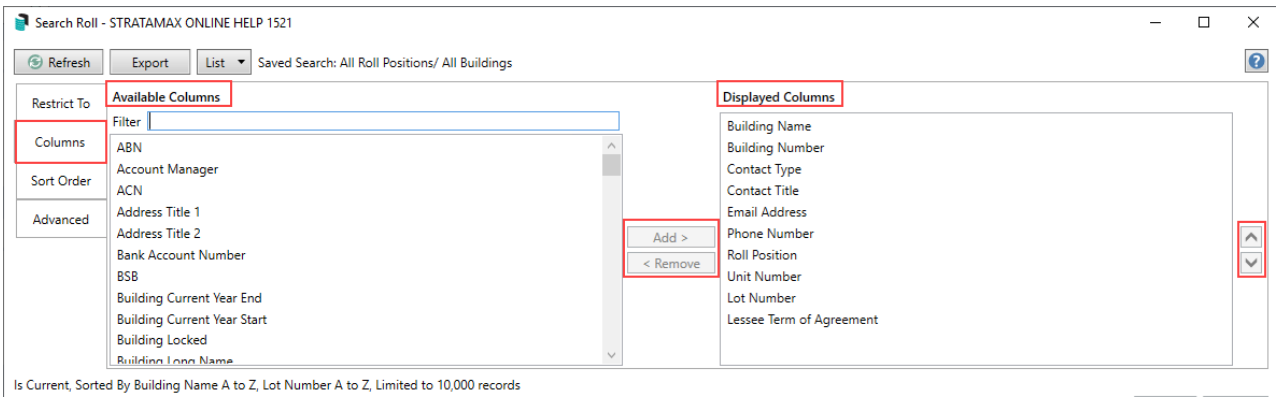
The available *Condition* and *Value* options will always reflect the field selected, so if an option described above is not shown, check the field that has been chosen.

Columns

The *Columns* tab is used to choose which fields are displayed in the search results. This can be used to show only the information needed for review, reporting, or export.

1. In the *Available Columns* list, select the column to be added.
2. Click *Add >* to move it to the *Displayed Columns* list.
3. To remove a column, select it in the *Displayed Columns* list and click *< Remove*.
4. To change the order of the displayed columns, select a column and use the *up* or *down* arrows.

The order of the columns in the *Displayed Columns* list determines the order they appear in the search results.

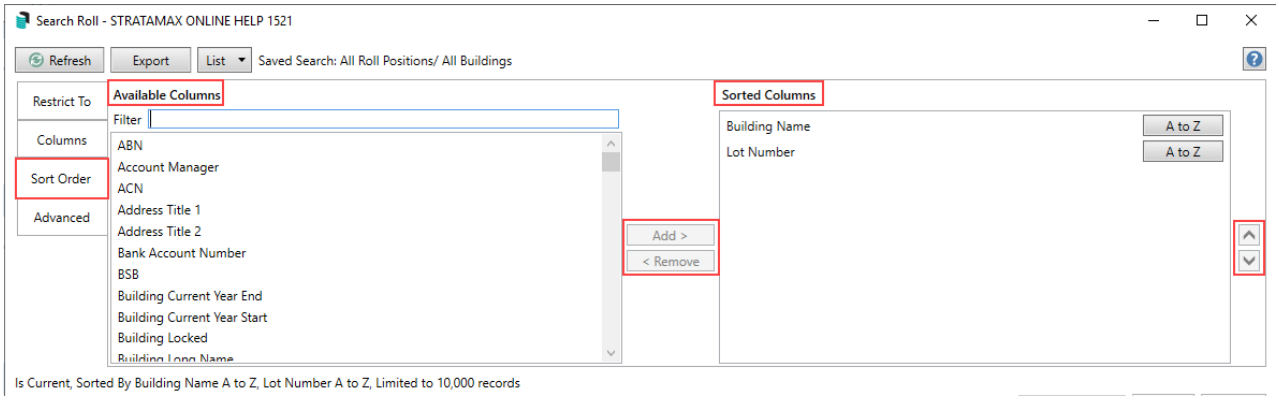


Sort Order

The *Sort Order* tab is used to control the order in which the search results are displayed. This can assist with reviewing records in a more useful order.

1. In the *Available Columns* list, select the column to sort by.
2. Click *Add >* to move it to the *Sorted Columns* list.
3. To remove a sorted column, select it in the *Sorted Columns* list and click *< Remove*.
4. To change the order of the sorted columns, select a column and use the *up* or *down* arrows.
5. Set the required sort direction for each column.
6. Click *Refresh* to apply the updated sort order.

The sort order may also be changed by clicking a column heading in the search results. When selected, the heading will indicate the current sort direction.

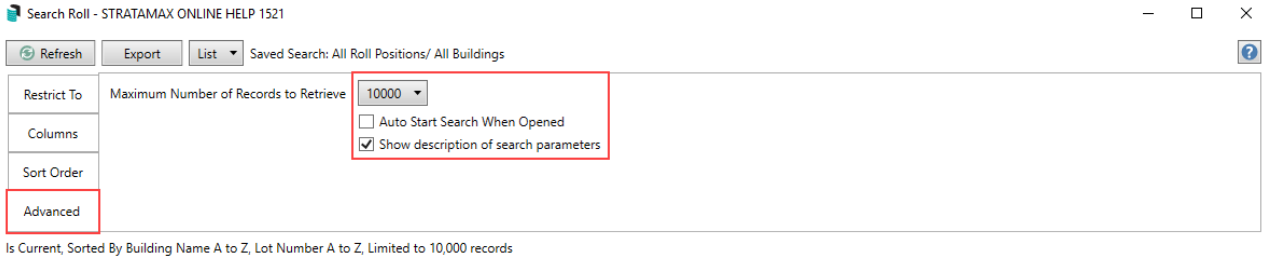


Advanced

The *Advanced* tab provides additional search options to assist with larger result sets or when reviewing search criteria.

1. If the results exceed the default 1000, use the *Maximum Number of Records to Retrieve* to increase the number of results returned.
2. Select *Auto Start Search When Opened* to start the search automatically when opened.
3. Select *Show description of search parameters* to display a summary of the search criteria on screen.
4. Click *Refresh* to apply the updated settings.

If *Show description of search parameters* is unticked, the description will no longer appear, but the search results will remain the same.



Use multiple conditions for the same field

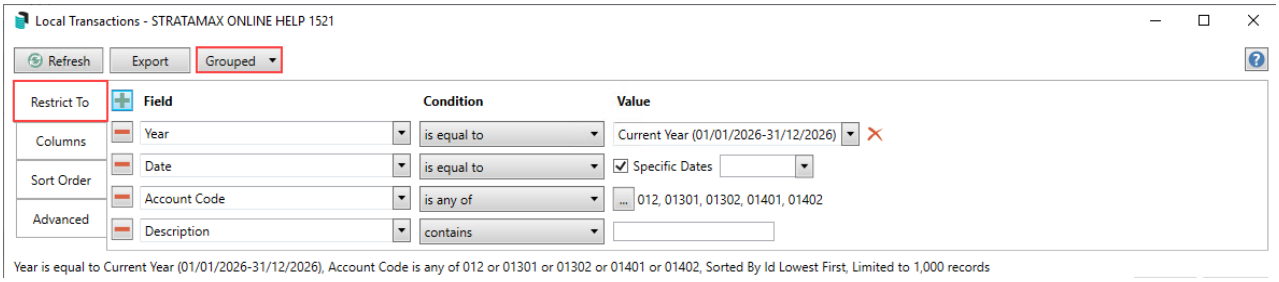
Searches can include the same field more than once, allowing different values or conditions to be used in the one search. This can be used with conditions such as *is equal to*, *starts with*, *is any of*, and *is empty*.

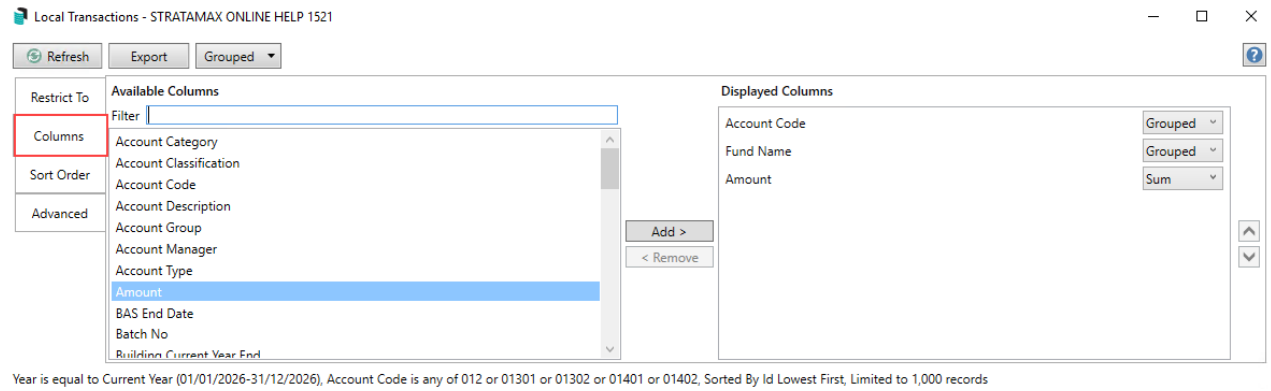
1. Open the required search.
2. In *Restrict To*, add the required field.
3. If needed, add the same field again.
4. Enter the required condition and value for each field.
5. If required, open *Advanced* and select *Show description of search parameters*
6. Click *Refresh*.
7. Review the search results and, if selected, the description shown on screen.

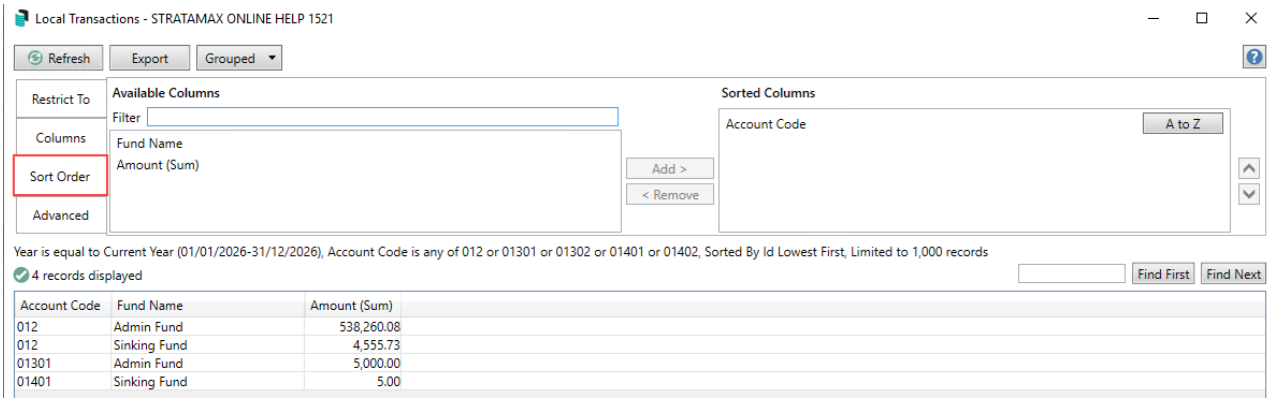
Grouped Summary Options

Grouped View provides a way to summarise search results by grouping records using selected fields. This can assist users when reviewing larger datasets by providing a higher-level view without requiring them to export the results first. There are some fields not available, but most are included.

Users can switch between the standard *List View* and *Grouped View* at the top of the search screen. Once *Grouped View* is selected, the required columns can be set up and the grouped results displayed. Grouped searches can also be saved, printed, or exported for reporting. Grouped searches are not available to add to the Dasbhboard at this stage.







Saved searches and Dashboard items

Once a search has been set up, it can be saved and used again later. This can be helpful for regular tasks or commonly used reporting requirements.

1. Set up the search using the required tabs.
2. Click *Save Search As* to save the search. Enter a *Name* for the search.
    - Available to current user only - only available to the user who has created the search.
    - Available to users in a security group - provides an option to set it for a group that the user is a member of.
    - Available to all users - allows all users to access this search.
3. To use a saved search again, click *Load/Edit/Delete Search* and select the required search.
4. If you update a saved search, click *Save Search* to save the changes.
5. If required, click *Add Dashboard Item* to make the saved search available from the ***Dashboard***. To access this from an existing search, click the  icon and click the *Add to My Dashboard* button.

Save as Default

Search settings can be saved as the default when a search is used regularly. The saved ***Restrict To***, ***Columns***, ***Sort Order*** and ***Advanced*** tab settings are applied automatically whenever the search is opened and available to the user using the search icon, removing the need to select ***Load/Edit/Delete Search***.

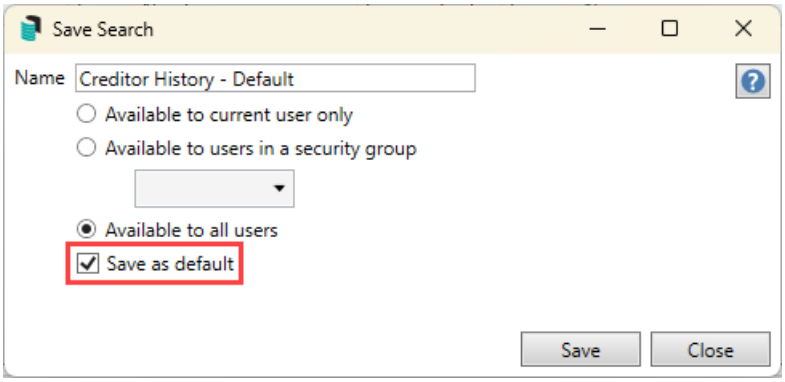
For example, a default search can be used to sort creditor history from newest to oldest. When the creditor invoice history is displayed, the most recent invoices will appear at the top of the list.

Not all saved searches can be added to the Dashboard. If this option is unavailable for a particular search, the ***Add to Dashboard*** button will not appear in the save search window.

1. Set up the search using the required tabs.
2. Click *Save Search As* to save the search. Enter a *Name* for the search.
    - Available to current user only - only available to the user who has created the search.
    - Available to users in a security group - provides an option to set it for a group that the user is a member of.

- Available to all users - allows all users to access this search.

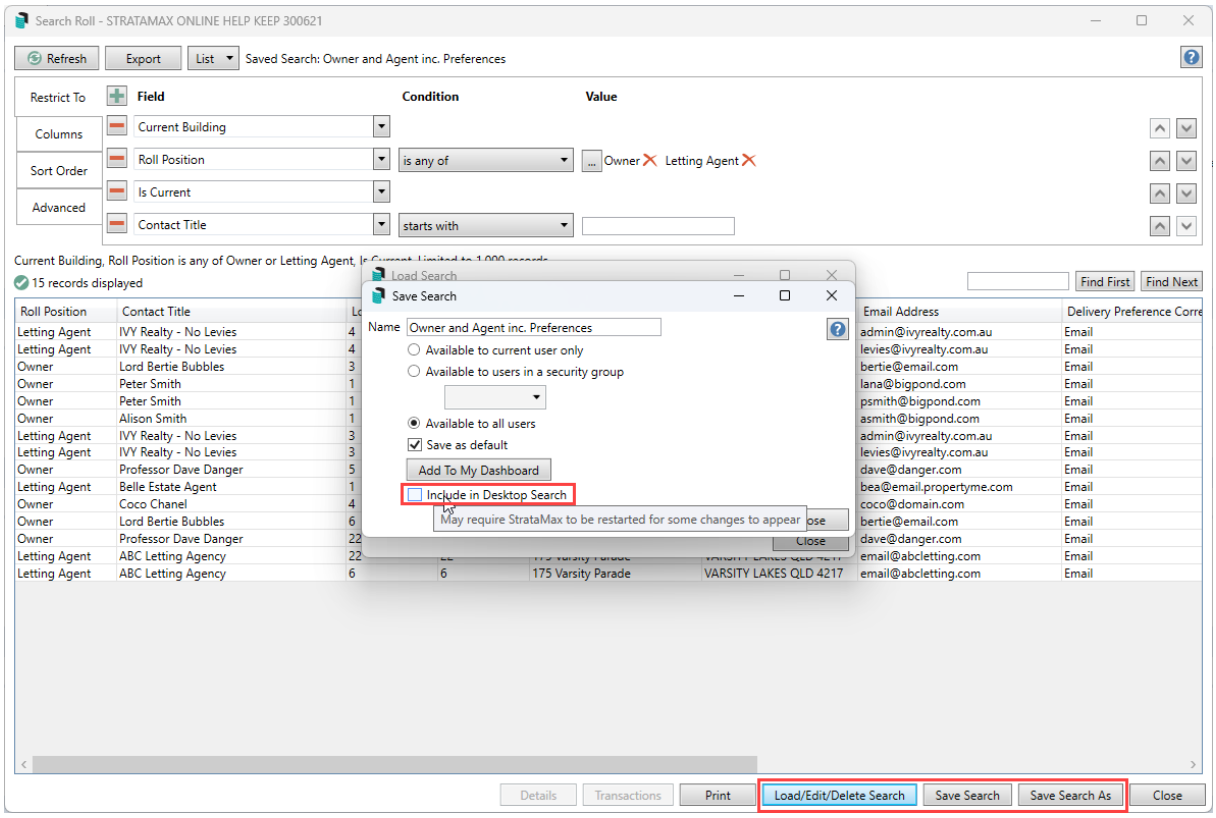
3. Tick *Save as default.*



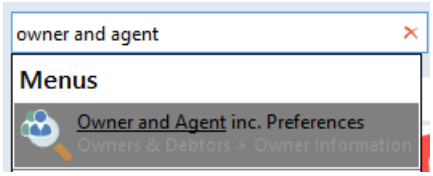
Accessing searches on the desktop

Most searches include an option to save to the desktop, which lets you search for that search in the desktop search bar. If a search is created or modified (by you or another user), BCMax must be closed and reopened before the updated search becomes available for use. The full list of available searches to be added to the desktop is available in the heading below.

1. Search for any of the supported search screens
2. Either create or load the search with the pencil icon.
3. Tick *Include in Desktop Search*| Save.



4. Close and re-open BCMax.
5. The saved search will become available in:
    - BCMax Desktop Search.



- StrataMax Search.



6. When a user enters text matching the saved search name, the saved search will appear as a menu item.
7. Selecting the menu item opens the saved search directly.

DocMax searches

In ***DocMax***, multiple conditions can also be used for the same field inAdvanced Search. The search will return matching results in the same way; however, the description of search parameters is not displayed on screen.

Searches available

***Local and Global Debtors** **	***Local Transactions***	***Global Transactions** **
***Search Bank Accounts** **	***Search Bank Statement History** **	***Search BAS** **
***Search Building Info History** **	***Search Buildings** **	***Search Contacts** **
Search Contracts	***Search Creditor Invoice Items** **	***Search Creditors** **
***Search Income Tax** **	***Search Inspections** **	***Search Insurance** **

Search Insurance Claims *	*Search Levies* *	*Search Local and Global Accounts* *
Search Meetings *	*Search Office Bearers* *	*Search Pay Employees* *
Search Payments *	*Search Quotes* *	*Search Recoveries* *
Search Roll *	*Search Work Orders* *	*Organisation - Searches*

NOTE: Searches marked with an * allow access to this search on the Desktop.