

Using Search Terms in the Value Fields

Search Data

To include a data element in your search, select the checkbox. To remove it from your search, deselect the checkbox.

Please note: To use the "Search Data" pop-up, you must select at least one data element. For more exact search results, include more data elements.

Adding Values

You may also choose to narrow your search further by adding a value to the data element(s) you have selected. Simply type the value information in the box to the right of the data element you have checked.

For example, if your report contains the "Age" data element, selecting it and adding a value of ">55" to "Age" will only display participants age 56 and older. To search for a specific employee by name (John Smith), select the "Employee Name" data element. Then enter the employee's last name followed by an asterisk in its value field (Smith*).

To run your search, click the "Search Report" button at the bottom. When you see your search results, you can click on any of them to see their location in the actual report

Data Element	Value
<input type="checkbox"/> Plan Number	<input type="text"/>
<input type="checkbox"/> Plan Name	<input type="text"/>
<input type="checkbox"/> Employee Name	<input type="text"/>
<input type="checkbox"/> Employee ID	<input type="text"/>
<input type="checkbox"/> Contract Number	<input type="text"/>
<input type="checkbox"/> Employee Status	<input type="text"/>
<input type="checkbox"/> Date of Birth	<input type="text"/>
<input type="checkbox"/> Date of Age 70.5	<input type="text"/>
<input type="checkbox"/> Current Age Years	<input type="text"/>
<input type="checkbox"/> Current Age Months	<input type="text"/>
<input type="checkbox"/> Subplan Name	<input type="text"/>
<input type="checkbox"/> Current Balance	<input type="text"/>
<input type="checkbox"/> Previous Year Closing Balance	<input type="text"/>

Using Search Terms in the Value Fields

When you specify terms to search for in a Value field, you can type in specific information such as "Leslie Thompson" to search for one match. Typically, search terms are used to find a set of matches. For example, type in the search terms "*Thompson" to find all names that end with Thompson.

Efficient Searching Using Operators, Wildcards and Patterns

When using search terms you can use **Operators**, symbols that represent functions, and **Wildcards**, symbols that stand for one or more unspecified characters. You can create complex terms that use a combination of Operators and Wildcard characters for more efficient searching. **Patterns** allow searching for characters both in a range and the selection of specific special characters.

Using Operators

The following **Operators** can be used in the Value fields in the search window. Please also see below: [Special Characters](#).

Operator	Description	Examples	Matches
=	Equals. By default, the = operator is implied.	=MR1500 MR 1500	MR1500 MR1500
>	Greater than or alphabetically after	>100 >Ace	101, 115, 200 Acer, Adobe
<	Less than or alphabetically before	<100 <Ace	10, 50, 99 Aamco, Abel
>=	Greater than or equal to	>=100 >=Ace	100, 101, 200 Ace, Adobe
<=	Less than or equal to	<=100 <=Ace	10, 50, 100 Aamco, Ace
-	Range. A hyphen separates upper and lower limits of the range. For strings, - can mean the following:	10 - 20 A - C -Ace	10, 15, 20 Ace, Bell, Core

	<ul style="list-style-type: none"> • b- is equivalent to >=b • -b is equivalent to <=b • - is equivalent to * (match all values) 	Ace-	Aamco, Ace Ace, Adobe
,	Or. Comma separates two values.	1,2 Ace,Ford	1, 2 Ace, Ford
!	Not	!1000 !MA	998, 999, 1001 CA, NJ, OH

Using Wildcard Characters

Use **Wildcard** characters to match patterns of text and objects. The following Wildcard characters can be used in the Value fields in the search window.

Wildcard	Description	Example	Matches
?	Find any one character	M?1680	MR1680, MS1680
*	Find any number of characters	3M*	3M A1000, 3M B2000
#	Find any one ASCII numeric character (0 - 9)	MS##90	MS0490, MS3290

Using Patterns

Patterns can further qualify a search. Patterns allow searching for characters in a range and for specific characters. Use brackets around the search expression like this: [pattern] to indicate searching for a Pattern. The following examples describe patterns that can be used in the Value fields in the search window.

Pattern	Description	Example	Matches
[list of characters]	Match any one of the characters inside the brackets	M[PRS]16	MP16, MR16, MS16
[a-z]	Match any lowercase character	m[a-f]1800	ma1800, mc1800

[0-9]	Match any ASCII numeric character	MX150[1-5]	MX1502, MX1503, MX1505
[a-z0-9]	Match any lowercase character and ASCII numeric character	m[a-c1-3]	ma1, ma3, mb2, mc3
[a-z-]	Match any character or hyphen	m[a-z-]	ma, mb, m-
[^]	Match one caret	*[^]1650	a^1650, b^1650

Searching Specifically for Special Characters: ?, *, and #.

Because the following **Special Characters: ?, *, and #** can be wildcards and have special meanings in search terms, you must indicate when you wish to search for the characters themselves. To search specifically for a special character use one of the following:

- Place the character inside brackets, like this: [?].
- Use the backslash (\) before any special character, and enclose both the backslash and the character in quotation marks, like this: "\?".

NOTE: For characters that also act as Operators, see below: [Searching for a String that Contains a Special Character](#).

The following examples describe searching for specific special characters. See also:

Special characters	Description	Examples	Matches
[?] or "\?"	Match one question mark	M[?]1600 M"\?"1600	M?1600
[#] or "\#"	Match one pound sign	M[#]1600 M"\#"1600	M#1600
[*] or "*"	Match one asterisk	M[*] 1600 M"*"1600	M*1600
[[] or "\["	Match one open bracket	M[[A[]]6 M"\["A""]6	M[A]6
[]] or "\]"	Match one close bracket	M[[A[]]6 M"\["A""]6	M[A]6
["\["-\"]"]	Match any ASCII character between [and]	M["\["-\"]"]	M[A] M[b]

Searching for a String that Contains a Special Character

If a **Search Text String** contains one or more special characters, you must type a backslash (\) before each special character. Special characters also include characters that act as Operators:

- Comma (,)
- Hyphen (-)
- Exclamation point (!)
- Less than sign (<)
- Greater than sign (>)
- Equal sign (=)
- Backslash (\)

Example:

The string:

Smith, John

must contain a backslash (\) before the comma:

Smith\, John

If you do not type a backslash (\) before the comma, the comma is interpreted as an OR

And the search would be for Smith OR John rather than for John Smith.