

# AT-A-GLANCE: ADVANCED LOOKUPS USING THE NAVIGATION PAGE TREE

- Lookups
- Saved Criteria...
  - Biographic**
  - Activity
  - Address
  - Affiliation
  - Award/Honor
  - Birth & Death**
  - Children
  - Comment
  - Comm Particip
  - Degree**
  - eContact
  - Email
  - Employment
  - Entity - Org
  - Entity - Person
  - Entity Rec Type
  - Geo Code
  - ID
  - Interest
  - Mail Control
  - Mailing List
  - Marital Info
  - Matching Policy
  - Mentor
  - Name
  - Org Contact
  - Org Relationship
  - Publication
  - Relationship
  - Salutation
  - Spec Handling
  - Sport
  - Stu Activity
  - Telephone
  - Vol Activity
  - ▶ Gift
  - ▶ Prospect Tracking

The Page Tree allows users to perform customized queries by entering any combination of information using various templates and lookup forms. For example, a user may wish to search for a list of Active, Reachable Alumni with a Preferred Address in Ohio who self-identify as Asian. This can be completed using an Advanced Lookup by first entering search criteria on the Bio-Entity template, then moving over to the Biographic tab and entering criteria under the Degree and Birth & Death sections. Results can be sent to clipboard where entity lists can be saved or reported on using the available context sensitive reports.

**IMPORTANT NOTE:** Users should contact [advancetrainer@case.edu](mailto:advancetrainer@case.edu) when performing new lookups to ensure the lookup can be done in Advance and that the selected search criteria is pulling the exact data the user is inquiring about.

To Perform an Advanced Lookup:  
Click on Lookups

Enter as much search criteria as possible on original template (the most frequently used template is Bio-Entity)

If additional search criteria is required, move to the left hand Navigation Tree to further customize the search

When all search criteria is entered, click 'View Criteria' to see all values that have been entered

Once all search criteria is entered, click 'Search' to execute the lookup

Remember to select the appropriate Results Format (the most frequently used format is the Entity Lookup List)

Once results populate, either send to a clipboard for saving or reporting

## Example 1

Search Criteria: Active, reachable alumni with a preferred address in Ohio who self-identify as Asian  
Go to Lookups & add the basic search criteria on the Bio-Entity Template (example left)  
Leave the Bio-Entity template and go to Biographic, Birth & Death to enter ethnicity criteria  
Click View Criteria to review all entered criteria. Click Search.

**Lookups** Actions

1. Choose a template (optional) Bio - Entity
2. Select results format\* Entity Lookup List
3. Select output type\* Display results/Open on exact match
4. Select additional criteria from page tree (optional)
5. Enter criteria below and click Search

View Criteria Clear Search

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**ID Lookup** Help

ID =

Alt ID =

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**Entity Lookup** Help

\*Sounds Like

Last/Org Name Begins with

First Begins with

Middle Begins with

Name Type =  (All)

Record Status =  Active

Primary Record Type =  Alumni

School/Dept =  (All)

Class =

Solicit Cntrl IN  M (Reachable)

Lookup =  (All)

Affiliation Code =  (All)

Affiliation Status =  (All)

Deleted =  Not Deleted

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**Address Lookup** Help

Preferred =  Preferred

Type =  (All)

City =

State =  Ohio

Country =  (All)

ZIP Code Begins with

Current =  Current

**Lookups** Actions

1. Choose a template (optional)
2. Select results format\* Entity Lookup List
3. Select output type\* Display results/Open on exact match
4. Select additional criteria from page tree (optional)
5. Enter criteria below and click Search

View Criteria Clear Search

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**Birth and Death** Help

Birth Place =

Death Place =

Degree =  (All)

Ethnicity =  Asian / Oriental

Ethnic Src. =  (All)

Religion =  (All)

**View Criteria** Save

Category	Field	Value
QuickLook Bio - Entity	delete_ind	= N
QuickLook Bio - Entity	record_status_code	= A
QuickLook Bio - Entity	record_type_code	= AL
QuickLook Bio - Entity	solicit_ctrl_code	IN S,T,C,
Birth and Death	ethnic_code	= 3
QuickLook Bio - Address	addr_pref_ind	= Y
QuickLook Bio - Address	state_code	= OH
QuickLook Bio - Address	current_ind	= Y

\*From the View Criteria form, Search Criteria can be saved and used again at a later date. Reference Saving Search Criteria for instructions on how to save search criteria.