

# AT-A-GLANCE: SAVING SEARCH CRITERIA

## WHEN TO SAVE SEARCH CRITERIA

Once a user has entered search criteria, that criteria may be saved for future use. In some cases this is a better option over saving a clipboard because saving criteria produces refreshed data every time you re-execute the search, whereas the search criteria when a saved clipboard list was produced remains static (i.e. if you ran a list of all active alumni who live in Ohio and save the clipboard, a week from now that list may be out of date due to people changing addresses or entities being coded deceased or no contact requested).

## HOW TO SAVE SEARCH CRITERIA

First, a user must enter desired criteria in Lookups. Once all criteria has been entered, click on the 'View Criteria' button. From the 'View Criteria' form header, click on 'Save'. Enter Title of Criteria and detailed explanation of the criteria for your reference.

## SHARING SAVED CRITERIA

If a user wishes to share saved criteria with others, they may do so by first checking 'Public' in the Saved Criteria List window prior to saving. Click 'New' on the Rights form header to add a rights group. Select a Rights Group from the drop down menu (Note: Bio Inquiry would grant access to all users). Select what type of rights you wish to grant or deny that group. Click 'Save' on the form header to save all changes.

## FINDING SAVED CRITERIA

Once the criteria has been saved, users can access previously saved criteria using the 'Saved Criteria' link on the Lookups Page Tree. Once users find their saved criteria they can re-run by hitting search. This will produce the most up-to-date information from the database.

Lookups - View Search Values

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 (80782)

Category	( Field	Current Search Values )
Degrees	dept_code	= NUR
Degrees	local_ind	= Y
Entity - Person	person_or_org	= P
Entity - Person	record_status_code	= A
Entity - Person	record_type_code	= AL
Prospect	active_ind	= Y
Prospect	pg_prospect_ind	= Y

Save Criteria

Saved Criteria List (80725)

Saved Criteria	Owner	Share
Nursing PG Prospects	Development Services	Public

Name\* Nursing PG Prospects

Description\* All active, NUR AL, who are PG Prospects.

Owner User Group\* DS Development Services

Public

Lookups

- ▶ Saved Criteria...
- ▶ Biographic
- ▶ Gift
- ▶ Prospect Tracking
- ▶ Add Allocation
- ▶ Add Person
- ▶ Add Organization
- ▶ Entity Update
- ▶ View Updates

Save Criteria

Name\* Nursing PG Prospects

Description\* All active, NUR AL, who are PG Prospects.

Owner User Group\* DS Development Services

Public

Rights (80730) (1/1)

Rights Group	Grant			Deny		
	Exec	Mod	Del	Exec	Mod	Del
Bio Inquiry	Grant					

Rights Group BI Bio Inquiry

Grant  Execute  Modify  Delete  Deny  Execute  Modify  Delete