

AT-A-GLANCE: EXPERT MODE

WHEN TO USE EXPERT MODE

Criteria Lists can be used to create lists of multiple values within a field. Values are joined by “OR” by default. Ranges can be created using the Expert Mode indicator, which allows you to change the operator to “AND” when entering the beginning and ending range value.

HOW TO OPEN EXPERT MODE IN LOOKUPS

After opening Expert Mode, users can criteria and click the + sign to add new rows. Select AND or OR appropriately. To get back to Basic Mode, click Actions, Basic Mode.

WHEN TO USE AND VS. OR

Use OR when searching for an entity that includes one criteria OR the other criteria. Examples include searching for an entity who is on the Psychiatry Committee OR the Family Medicine Committee, but not both committees; searching for an entity who self-identifies as Asian or African American or Latin; searching for an entity who has a Bachelor’s Degree or a Master’s Degree from CAS.

Use AND when searching for date ranges, gift amount ranges, and class year ranges. An example includes searching for a list of entities who graduated anywhere between the year 2000 AND 2010.

CAUTION: Users looking for a list of alumni who graduated with a Bachelor’s of Arts Degree AND a Master’s of Arts Degree from College of Arts & Sciences, for example, cannot produce results using the expert mode AND function. Instead, users would need to do a degree lookup two times (once for the B.A. and once for the M.A.), save the results to the clipboard and use the INTERSECT function to display a list of entities containing both the B.A. and M.A. degrees.

The screenshot shows the 'Lookups' interface. It includes a list of steps: 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. There are 'View Criteria' and 'Clear' buttons at the bottom left, and a 'Search' button at the bottom right. An 'Actions' menu is open in the top right corner, with 'Expert Mode' highlighted in red.

The screenshot shows the 'Birth and Death' criteria form. It has fields for 'Birth Place', 'Death Place', 'Obituary', and 'Ethnicity'. Each field has a '+' sign to add criteria. The 'Ethnicity' field is selected, and the operator is set to 'or', which is circled in red. The criteria entered is '(Hispanic / Other)'. Below it, another 'Ethnicity' field is shown with the operator set to 'AND' and the criteria 'African American/Black'.

Operator	Definition
=	Data must be equal to the entered value i.e. Last Name = Smith
>	Data must be greater than the entered value i.e. Transaction Amount > 9,999
>=	Data must be greater than or equal to the entered value i.e. Class Year >= 1996
<	Data must be less than the entered value i.e. Birthdate < 1984
<=	Data must be less than or equal to the entered value i.e. Class Year <= 2002
<>	Data not equal to entered value i.e. Class Year <> 2009
AND vs. OR	AND indicates you are searching for a value including both values (i.e. X and Y). OR indicates you are searching for one or another value, not both (i.e. X or Y).
Date Range	Looking for alumni from years 2002 to 2010 Class Year >= 2002 AND <= 2010
Zip Code Range	Looking for zip codes in Northern Ohio Zip Code >= 44000 AND <= 44399