

AT-A-GLANCE: COMMITTEES IN ADVANCE

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Committee Members should be tracked in Advance in an entity's record under Biographic-Committee Participation. If regular committee meetings are held, those meetings can also be tracked as Events in an entity's record under Biographic-Activity. Users can enter this information via manual entry or by using the Events Loader canned report/process.

REQUESTING ADDITION OF COMMITTEES & CODING MEMBERS

1) Email uris-data@case.edu with the name/title of the committee. The data team will add the committee name into Advance.

2) Included in the email to uris-data@case.edu should be an Excel list of committee members. The list should include first name, last name and entity ID of each member and the committee name to which they should be added. The data team will code each entity as a current member of the specified committee.

3) If any of the proposed committee members are not currently in Advance, include as much biographical information as possible on the Excel spreadsheet so the data team can add them as new Advance entities (ex: first and last name, address, telephone, email, birthday, employment information, etc.)

PULLING LISTS OF COMMITTEE MEMBERS

Once committee members are coded in Advance, users can pull a list of committee members:

- Go to Lookups
- Change the Bio-Entity template to Bio-Committee Participant
- Enter the Committee name and Status
- Click Search
- Once results appear, selection from Actions - Export to export the list to a spreadsheet or Actions - Reports to run a Context Sensitive Report on the result list.

MAINTAINING COMMITTEE LISTS

It is the responsibility of the requesting department to keep their committee lists up to date in Advance. Please email uris-data@case.edu with the names and entity ID's of those members who leave or join a committee. The data team will then change the indicated entity's committee member status from Current to Past (or Lifetime Member) - whichever is indicated by the requesting department.

Lookups Actions

1. Choose a template (optional)
2. Select results format*
3. Select output type*
4. Select additional criteria from page tree (optional)
5. Enter criteria below and click Search

Committee Participant Lookup Help

Committee =

Group =

Unit =

Status =

Role =

Geo Type =

Geo Code =

Data Src =

Source =

Class =

Start >= / /

Stop <= / /

Lookup Results Actions

Items 1 to 3 of 6

Committee Participation Lookup List (1/6) Actions Help

Name	Address	Phone	Committee	Status	Unit	Class Year	Geo Type	Geo Code	Start
Mr. Mark D. Agrast (Alumni Western Reserve College 1978)	1419 Crittenden Street Northwest Washington, DC 20011-4338	(202) 882-4597	CAS Dean's Advisory Council	Current					
Mrs. Sandra A. Allen (Alumni Flora Stone Mather College 1971)	2116 Sahalea Terrace Silver Spring, MD 20905-3900	(301) 476-7886	CAS Dean's Advisory Council	Current					

Actions