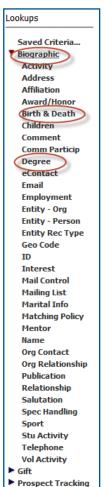
## AT-A-GLANCE: ADVANCED LOOKUPS USING THE NAVIGATION PAGE TREE



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.

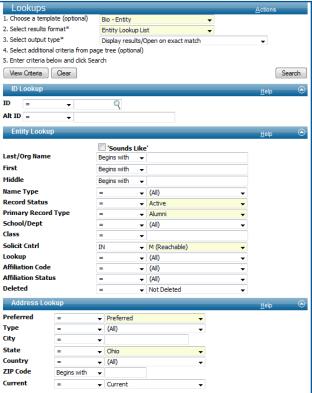
IMPORTANT NOTE: Users should contact advancetrainer@case.edu when performing new lookups to ensure the lookup can be done in Advance and that the selected search criteria is pulling the exact data the user is inquiring about.

## 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        | Bio Detail -Birth a                      | and Death             |                 |               | <u>A</u> ctions |
|----------------|--|-----------------------|-----------------|---------------|-----------------|
|                | 1. Choose a template (option             | al)                   |                 | ▼             |                 |
| Saved Criteria | <ol><li>Select results format*</li></ol> | Entity Lookup List  ▼ |                 |               |                 |
| Biographic     | <ol><li>Select output type*</li></ol>    | Display re            | sults/Open on ( | exact match   | ▼               |
| Activity       | 4. Select additional criteria fro        | om page tree (opt     | tional)         |               |                 |
| Address        | 5. Enter criteria below and cli          | ck Search             |                 |               |                 |
| Affiliation    | View Criteria Clear                      |                       |                 |               | Search          |
| Award/Honor    | view Citteria Clear                      |                       |                 |               | Sealch          |
| Birth & Death  | Birth and Death                          |                       |                 |               | Help 🕒          |
| Children       | Birth Place                              |                       | _               |               | 2-4             |
| Comment        |  | = -                   |                 |               |                 |
| Comm Particip  | Death Place                              | = -                   |                 |               |                 |
| Degree         | Obituary                                 | = •                   | (All)           | ▼             |                 |
| eContact       | Ethnicity                                | = •                   | Asian / Orien   | tal 🔻         |                 |
| Email          | Ethnic Src.                              | = -                   | (All)           | _             |                 |
| Employment     | Religion                                 |                       | (All)           | View Criteria |                 |
| Fntity - Ora   |  | - •                   | /UII)           | view Criteria |                 |

\*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.

|                    |   |   |   | - 5   |
|--------------------|---|---|---|---|
| Field              |   |   | Value   |   |
| delete_ind         | =   | N   |   |   |
| record_status_code | =   | Α   |   |   |
| record_type_code   | =   | AL  |   |   |
| solicit_ctrl_code  | IN  | s,T,C,  |   |   |
| ethnic_code        | =   | 3   |   |   |
| addr_pref_ind      | =   | Υ   |   |   |
| state_code         | =   | ОН  |   |   |
| current_ind        | =   | Υ   |   |   |
|                    | delete_ind record_status_code record_type_code solicit_ctrl_code ethnic_code addr_pref_ind state_code | delete_ind = record_status_code = record_type_code = solidt_ctrl_code IN ethnic_code = addr_pref_ind = state_code = | Field   delete_ind   = N   record_status_code   = A   solicit_ctrl_code   IN S,T,C, ethnic_code   = 3   addr_pref_ind   Y   state_code   = OH   current_ind   = Y | delete_ind = N record_status_code = A record_type_code = AL solicit_ctrl_code IN S,T,C, ethnic_code = 3 addr_pref_ind = Y state_code = OH |