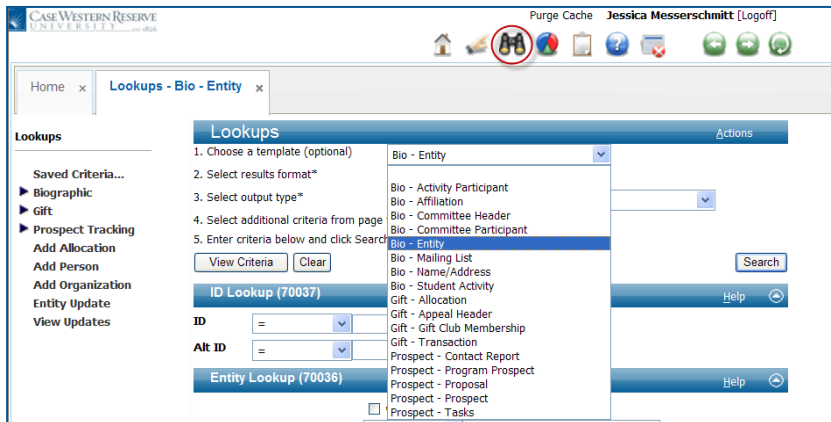# At-A-Glance: Bio Lookup Templates

There are two ways to perform a complex lookups: Lookup Templates or the Page Tree.


Under the Lookups form header (blue title bar), there are five available options:

1. Choose A Template — Allows the user to pick the type of lookup to perform (ie: entity, proposals, prospect, etc).

2. Select Results Format — Allows the user to pick the type of results format. You must specify at least one search criterion that corresponds with your selected format. Ex., If you select Giving Transaction Lookup list format you must specify at least one gift criterion.

3. Select Output Type — Allows the user to choose what they want to do with their search results (ie: display results, print results, copy results to clipboard, etc).

4. Select additional criteria from page tree (optional) - to further refine the search, a user can use the page tree to add additional criteria (this method to perform a search will be explained in the next section).

5. Enter criteria below and click 'Search' - each template has a set of pre-defined attributes for establishing lookup criteria. For example, when using a Bio-Entity lookup, the template is populated with certain lookup forms such as ID lookup, Entity Lookup, Address Lookup, and Geo Code Lookup. Depending on the type of template selected, these lookup forms would change. After a user is finished entering their desired criteria, click on the 'Search' button to retrieve results.

Example 1: Bio-Entity
Search: Active, reachable alumni who graduated from the School of Dentistry in 1984 who have a preferred addres in California.
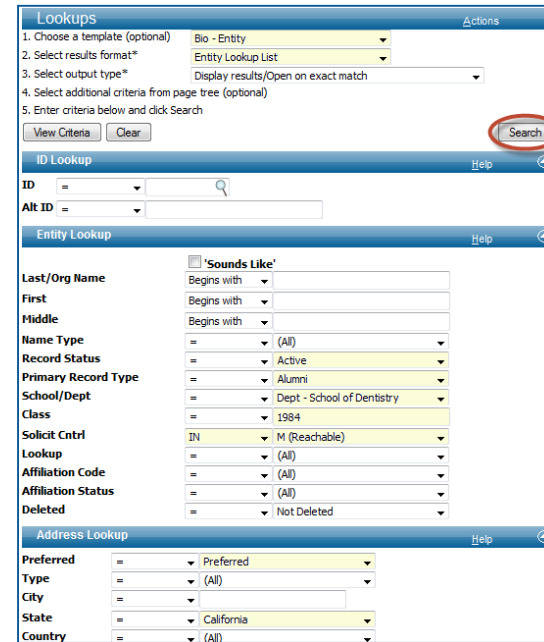
Example 2: Bio-Committee Participant Lookup
Search: Current members of the School of Medicine Committee for Advancement of Human Health