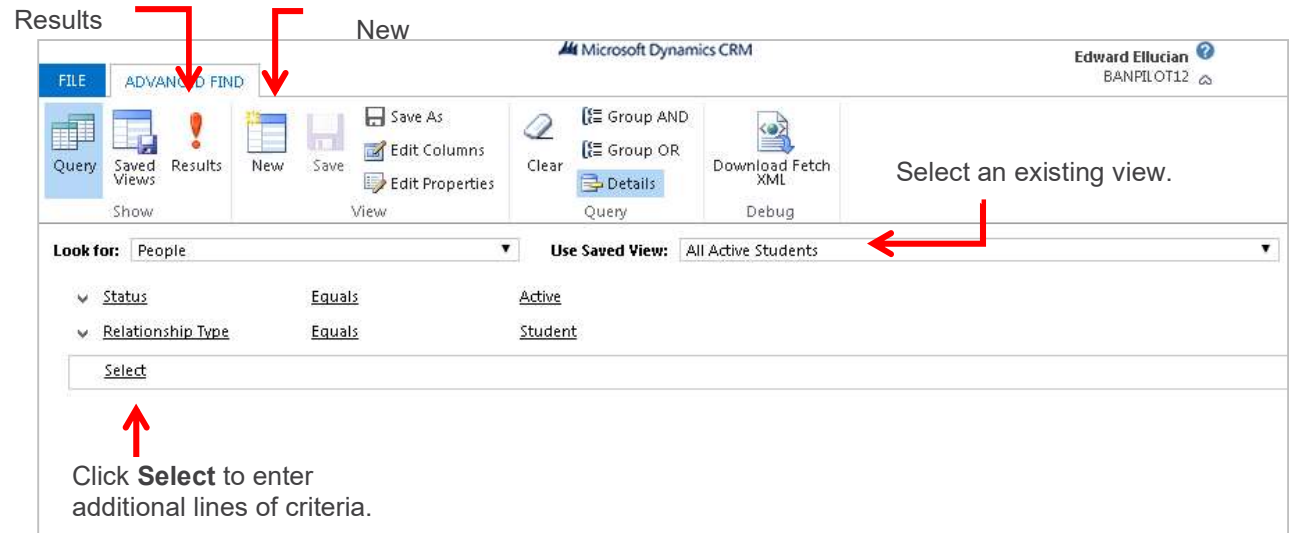


Performing an Advanced Find

To create an Advanced Find, you first select an entity in the **Look for** field. Or, you can use an existing **Saved View** which includes an entity and already established criteria and build on it.

1. Click the **Advanced Find** icon.
2. Select the appropriate entity, such as **People**.
3. Optional: Once the **Look For** is set to the desired entity, any saved views can be used.
4. Click **Select** to add criteria.
5. Click the **Fields** drop-down to select a field or related record.
6. Indicate the operator. Note: The default is **Equals** but may be changed.
7. Click the **Enter Value** link to specify the criteria to be used when creating the view.
8. Click the check box to the left of the value, click **Select** to move the value into the **Selected records** box, then click **Add**.
9. Repeat steps 4-7 to continue adding criteria.
10. When finished, click the red exclamation mark (!) to see results.
11. Optional: If you want to save these settings to future use, click on Advanced Find tab.
12. Click **Save As**.
13. Enter a name and description for the view.
14. Click **OK**.



Sharing Views

You can make saved views available to others by sharing them.

1. Click the **Advanced Find** icon.
2. Set the **Look For** to the entity that the Saved View is associated with. For example, **People**
3. Click **Saved Views** on the ribbon.
4. Click the check box to the left of the view's name. Note: Do not click the name of the view as it returns you to the Advanced Find Query view.
5. Click **Share** on the ribbon.
6. Under **Common Tasks**, select **Add User/Team**
7. On the **Look Up Records** window, click the check box to the left of the names for whom you want to share the view.
8. Click **Select**, then click **Add**.
9. Assign specific permissions to users, such as read, write and delete (see below).
10. Click **Share**.



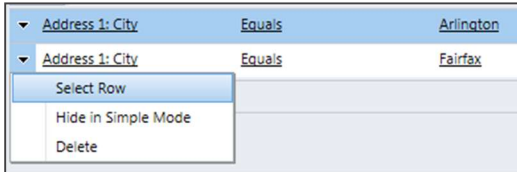
Creating Complex Queries

Each time you complete a criteria row, another **Select** link displays at the start of a new row.

Use the **Select** link to work your way from left to right selecting a field, operator, and values. When you have added all your criteria, you can create complex queries by selecting rows and grouping criteria.

Selecting Rows

1. Click the drop-down arrow next to the row you want to select.
2. Click **Select Row**.



Grouping Using AND

You can group criteria so that the rows must meet all criteria using Group AND.

1. Select the rows you want to group.
2. Click **Group AND** from the ribbon.

Grouping Using OR

You can group criteria so that the rows must meet only one of the selected criteria.

1. Select the rows you want to group.
2. Click **Group OR** from the ribbon.

Viewing Query Results

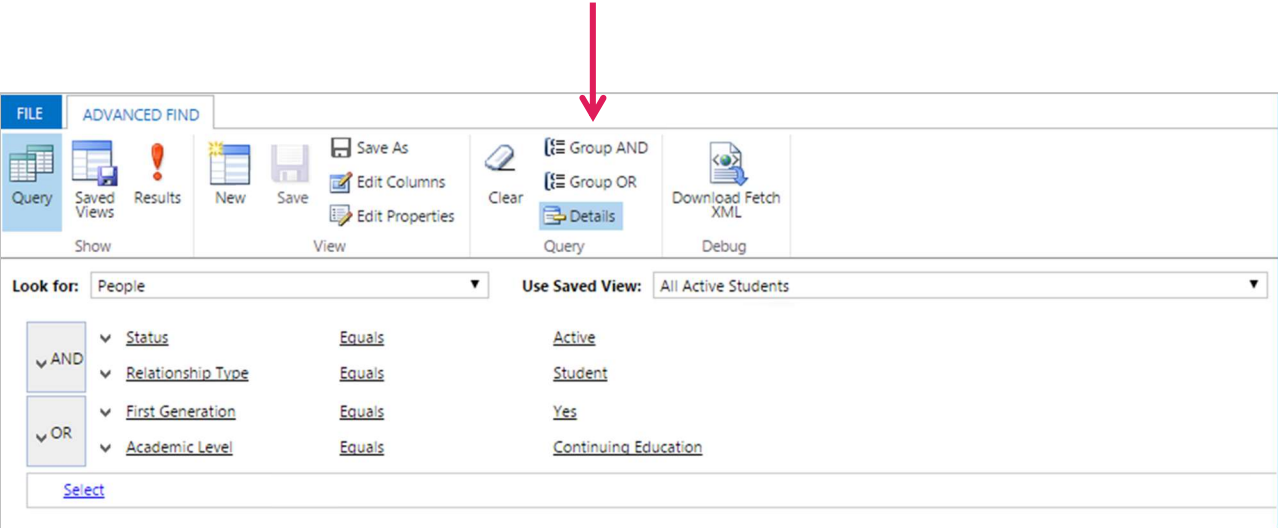
You can review the results returned by a query in a grid table.

1. Click the **Results** icon.



Note: You can only group items from the same entity together.

Combine selected rows by clicking **Group AND** or **Group OR**



Modifying the Column Output

You can modify the column output of an Advanced Find by clicking **Edit Columns** on the ribbon. You can remove columns, add columns, or change the display order of the columns.

Removing a Column

1. Select the column that you want to remove. A green highlight box indicates which column(s) is selected.
2. Click **Remove**.
3. Click **OK**.

Adding a Column

1. Click **Add Columns**.
2. Select the check box next to the desired field(s).
3. Click **OK**.

Note: The new column(s) display at the end of the list of columns. You may need to scroll to the right to see the new column(s).

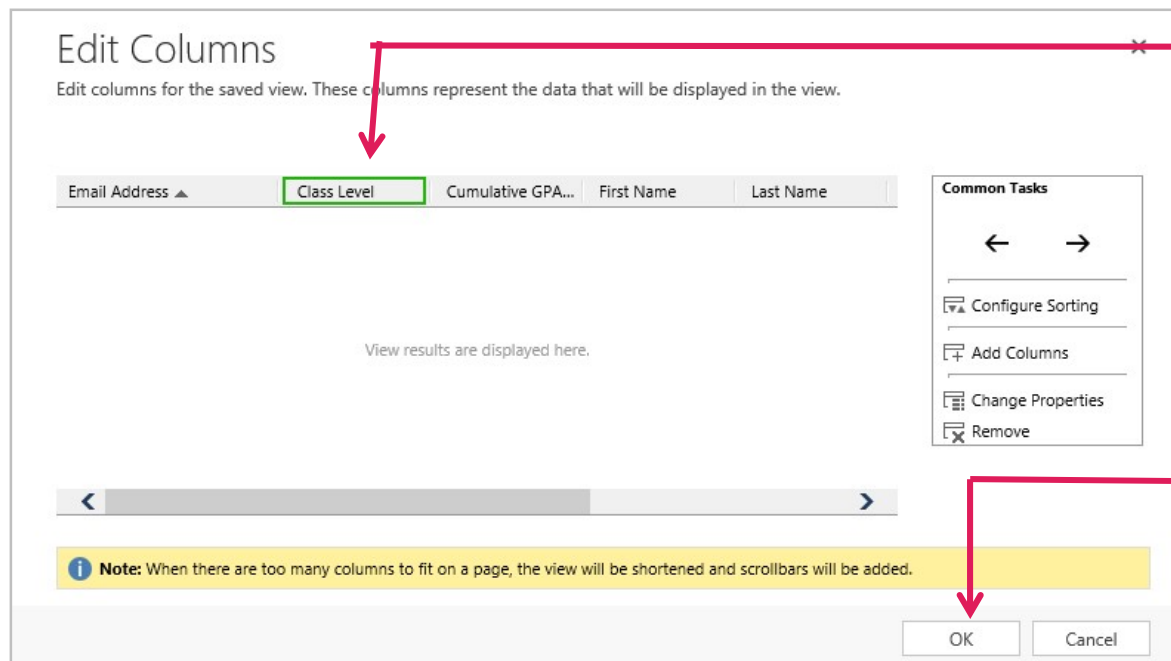
To save these modifications, save the view once you have returned to the Advanced Find; otherwise, the view resorts back to the default.

Changing the Display Order

1. Select the column that you want to move.
2. Use the left and right arrows ← → to move the column to the desired location.
3. Click **OK**.

Changing Column Width

1. Select the column that you want to edit.
2. Click **Change Properties**.
3. Select a column width.
4. Click **OK**.



Highlighted column.

Use the arrows to move the highlighted column.

Add or Remove columns.

Click **OK** to save all changes and close this window.