Advanced Find

User Guide

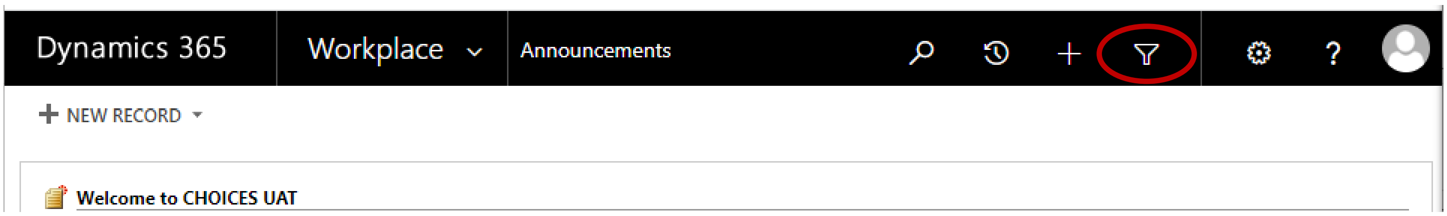
# Using Advanced Find in CHOICES

(The personal information and accompanying data shown in this guide are fictional and are used for illustrative purposes only.)

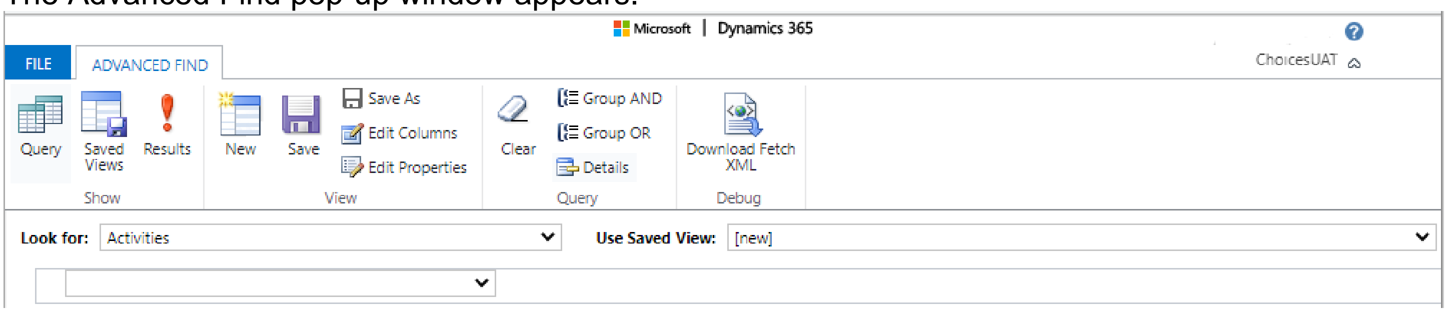
Advanced Find is a reporting tool in CHOICES that allows the user to create advanced find search queries that can be extracted to Excel. The user defines the criteria to filter the data and provide specific data set results. The results of the query can then be exported. Please keep in mind that users can only create queries with the information that they have access to based on their role in CHOICES.

## Finding the Advanced Find

To create a query, click on the Advanced Find button (funnel) on the top left portion of the Dynamics 365 toolbar



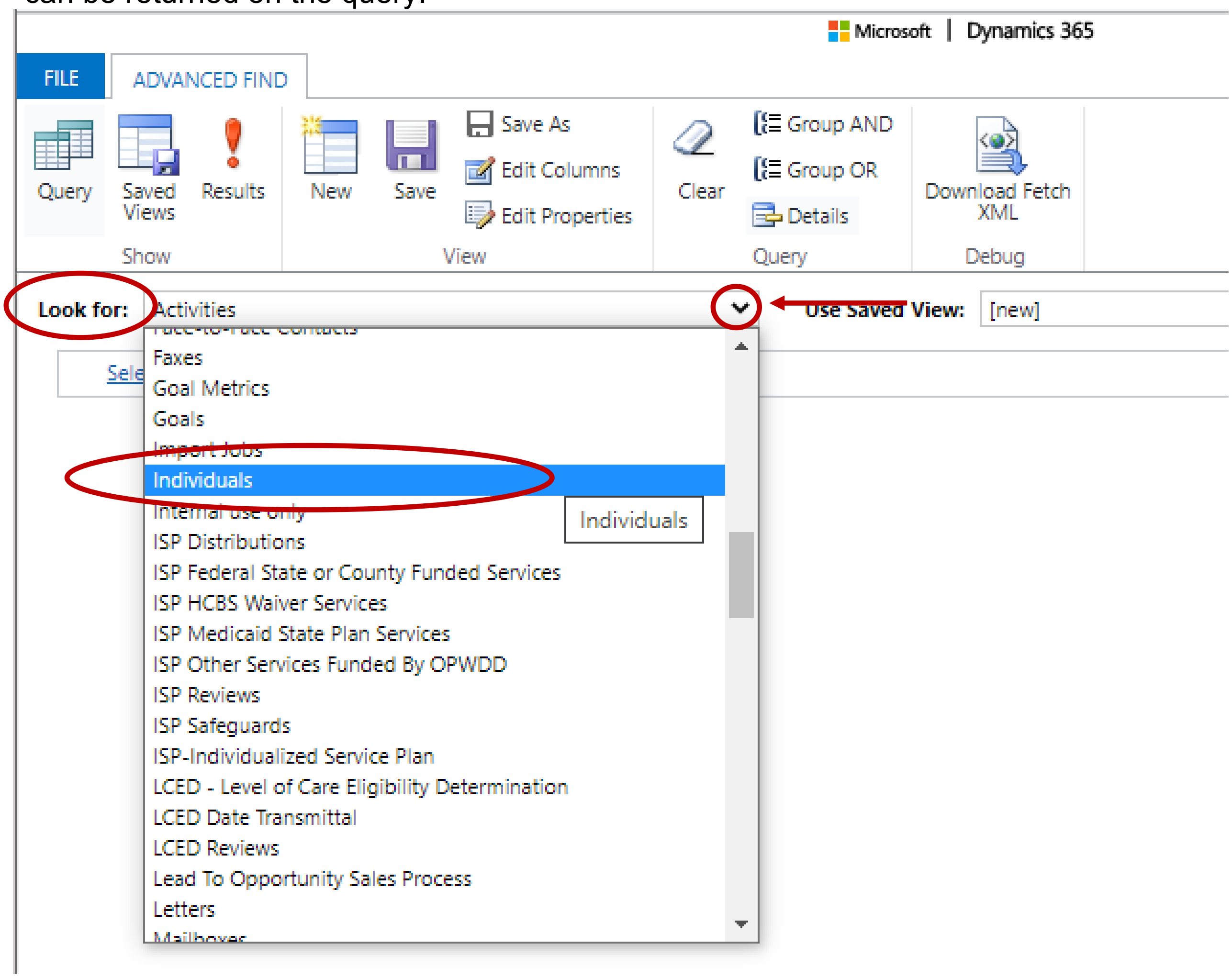

The Advanced Find pop-up window appears.



## Creating a Query

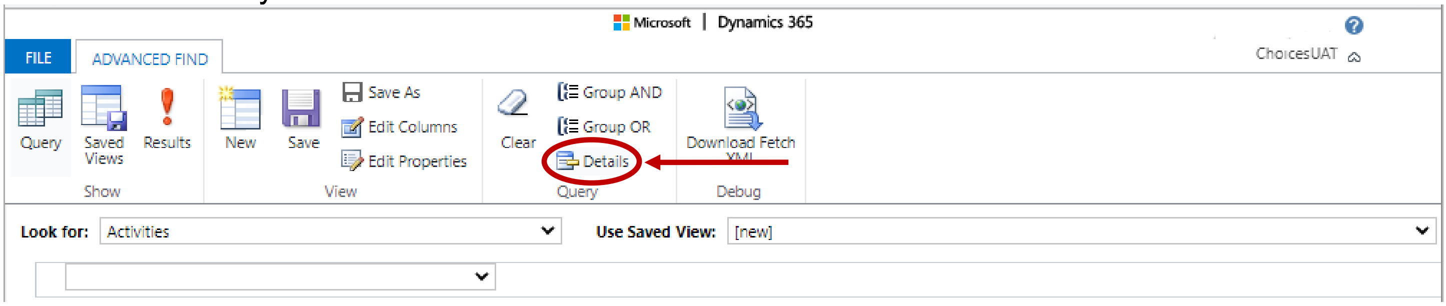
I
n the following example, you'll create a query to view records of **Individuals** who reside in a certain **County** and who are enrolled in a certain **Program Code**.

1. The fields you select will depend on the Record Type selected, so to to start the query, select the Record Type you want to work with from the "Look for" drop down list. In this example, choose "Individuals" from the drop-down list. The Record Type limits the criteria and fields that can be returned on the query.

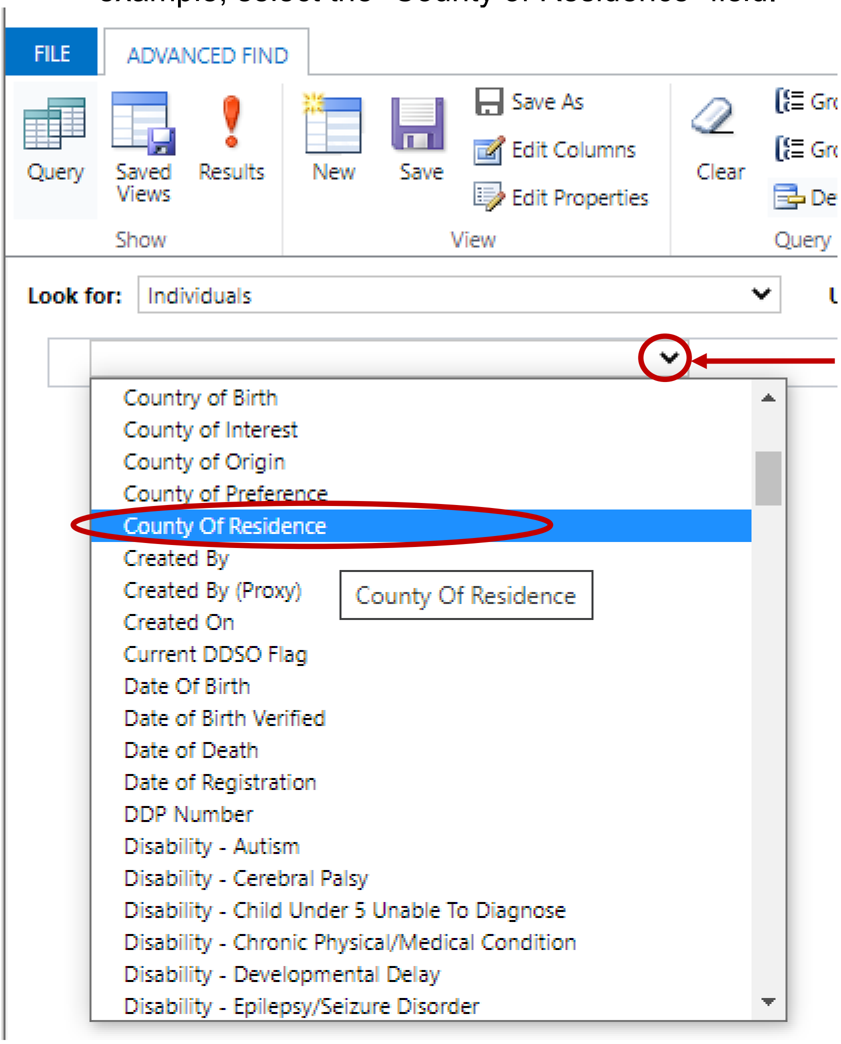


2. Next, select the criteria for the fields.

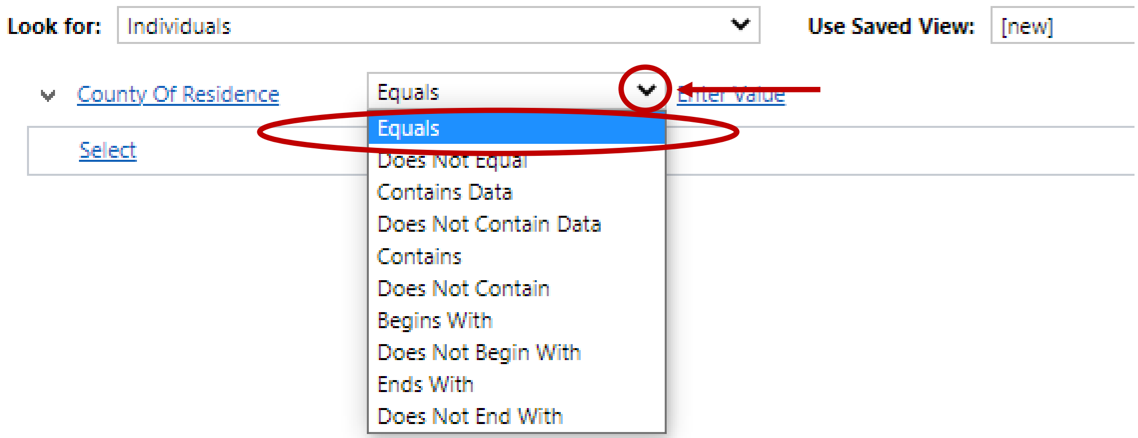
   Make sure the "Details" icon is highlighted (if not then click on it); this will allow you to select the criteria you need.



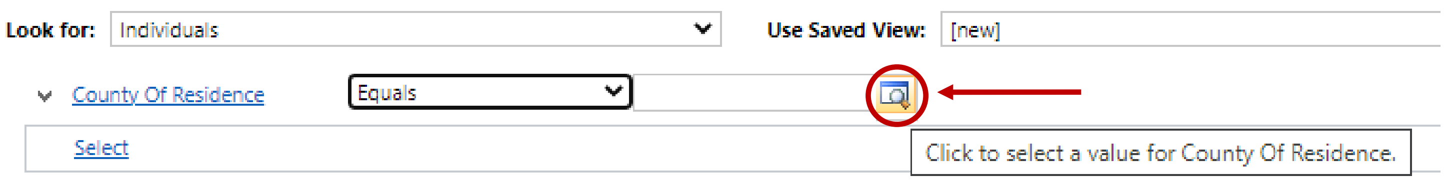

   From the drop-down list, select the criteria that you want to limit the query on. For the example, select the "County of Residence" field.



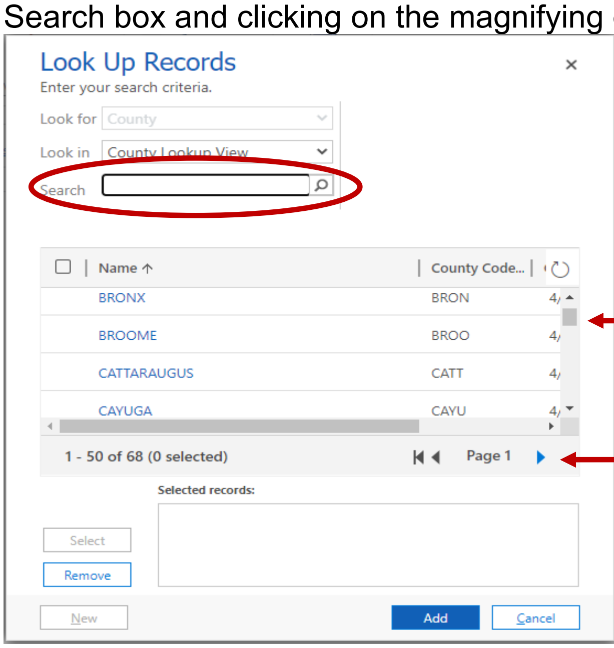
3. Select the formula for the criteria that you selected. The formula “Equals” is the default, but you may choose other options by clicking on the drop-down arrow and changing the formula to any other available option, e.g. “Contains”, “Begins With”, etc. In this example, keep the default of “Equals”.



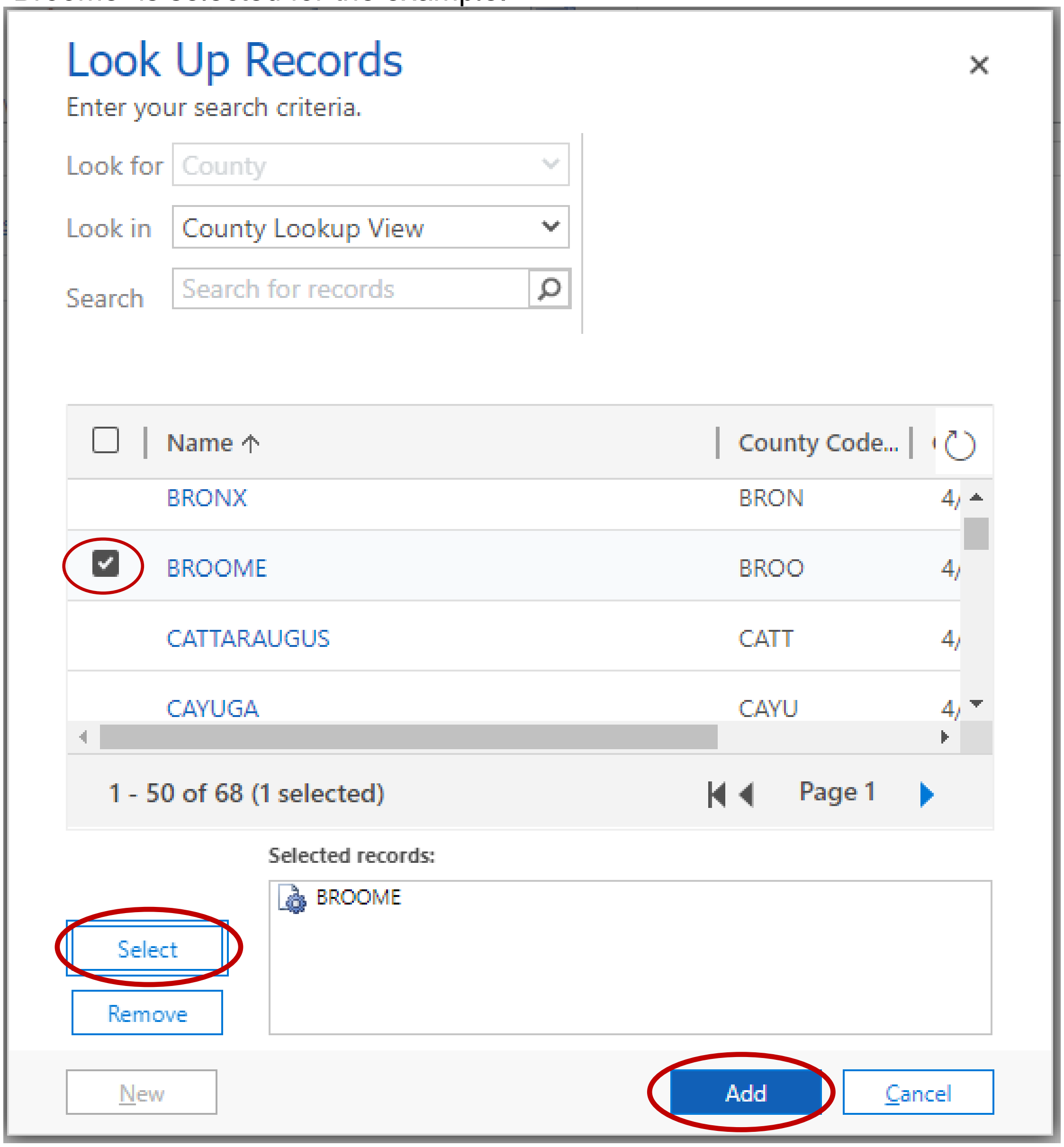

4. Next enter a value for the criteria that you selected. In order to enter a value, you may type the name in the empty value field where it reads “Enter Value”, just be sure to spell it correctly or the query will not yield any results. You can also click on the Search icon to bring up a Look Up Records dialog box for all available values. Hover over the field to have the Look Up Records dialog box appear.



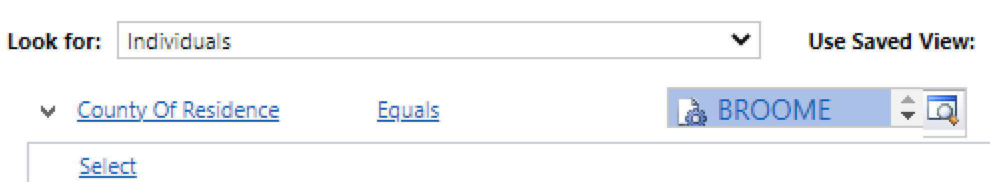

5. The Look Up Records dialog box appears. Search for the particular county by scrolling through the list with the scroll bars and then clicking the blue triangle next to “Page 1” to go to the next page. You can also search for a specific County by typing the county name in the Search box and clicking on the magnifying glass.



Click on the checkbox to highlight the appropriate County and then click the “Select” button to add the value to your selection.  Once all sections have been made, lick the “Add” button to go back to the Advanced Find window and continue with the query.
“Broome” is selected for the example.

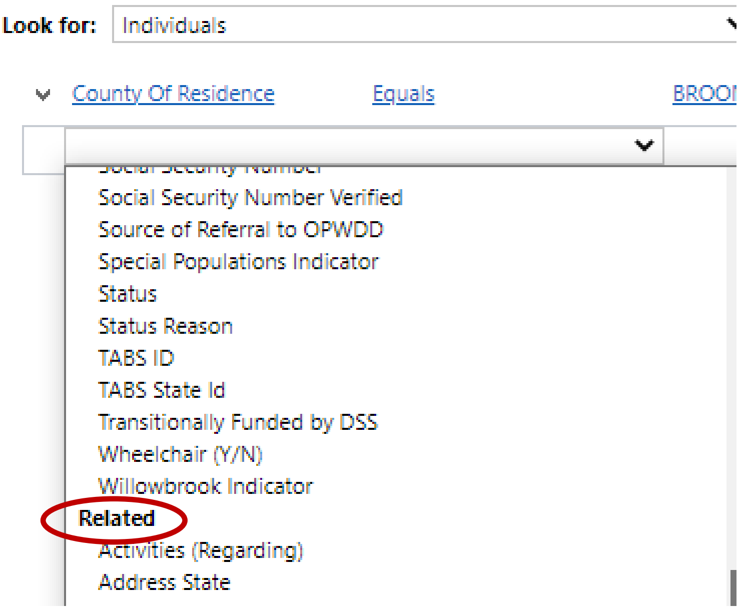



The criteria is now added to your query.

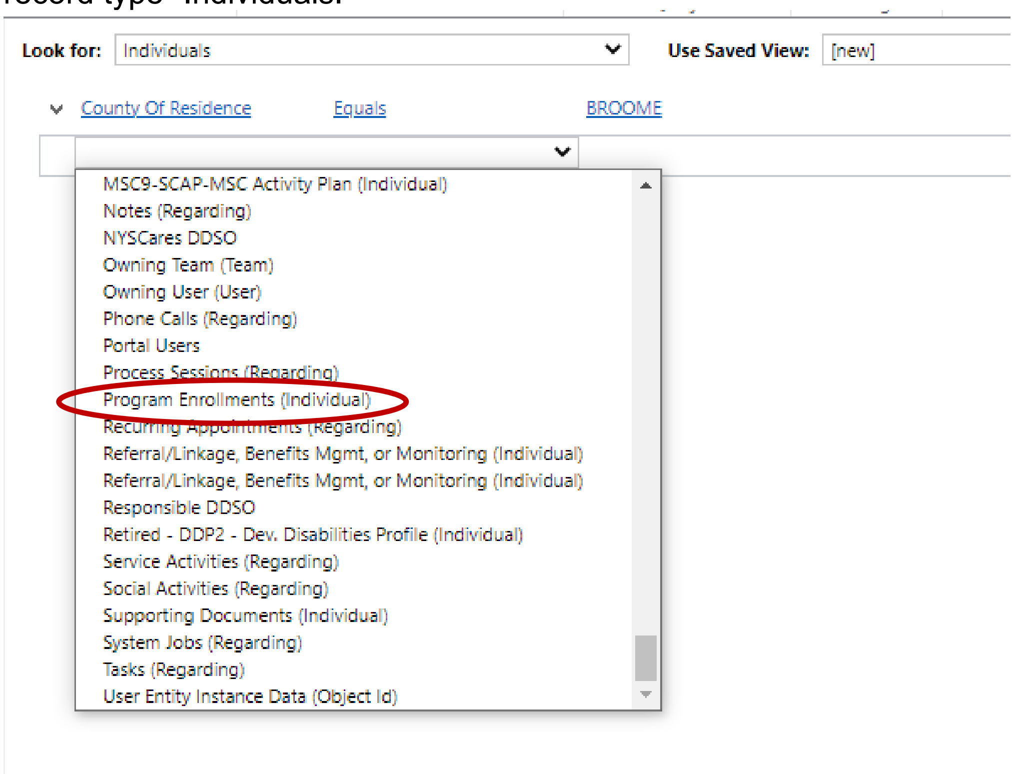


6. Repeat steps 2 through 4 to select other criteria to further define the query.

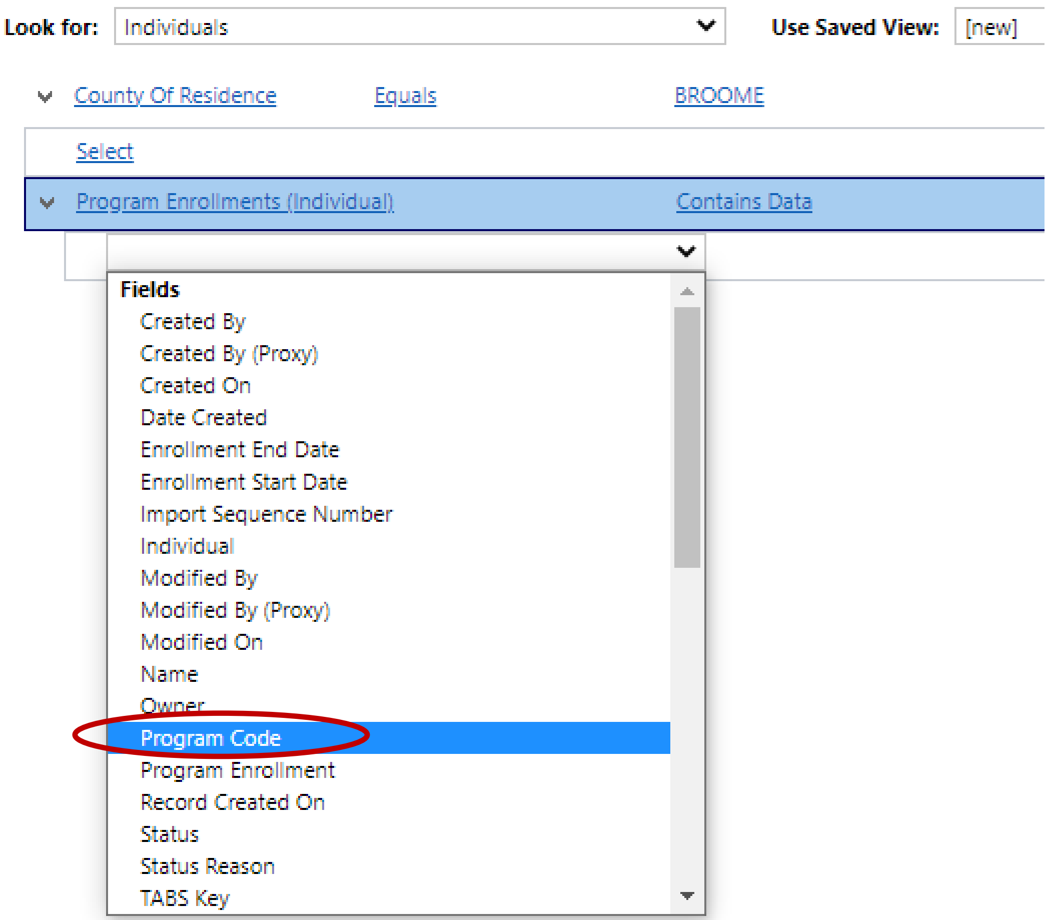
7. There are two types of criteria that can be chosen. The first is by the fields that are found in the Record Type. The second are the fields that are found in related but other Record Types. To find the fields that are located in other related Record types scroll past the first set of fields until you reach “Related.” Scrolling after this will bring you to the other Record Types that are connected to the Record Type initially selected.



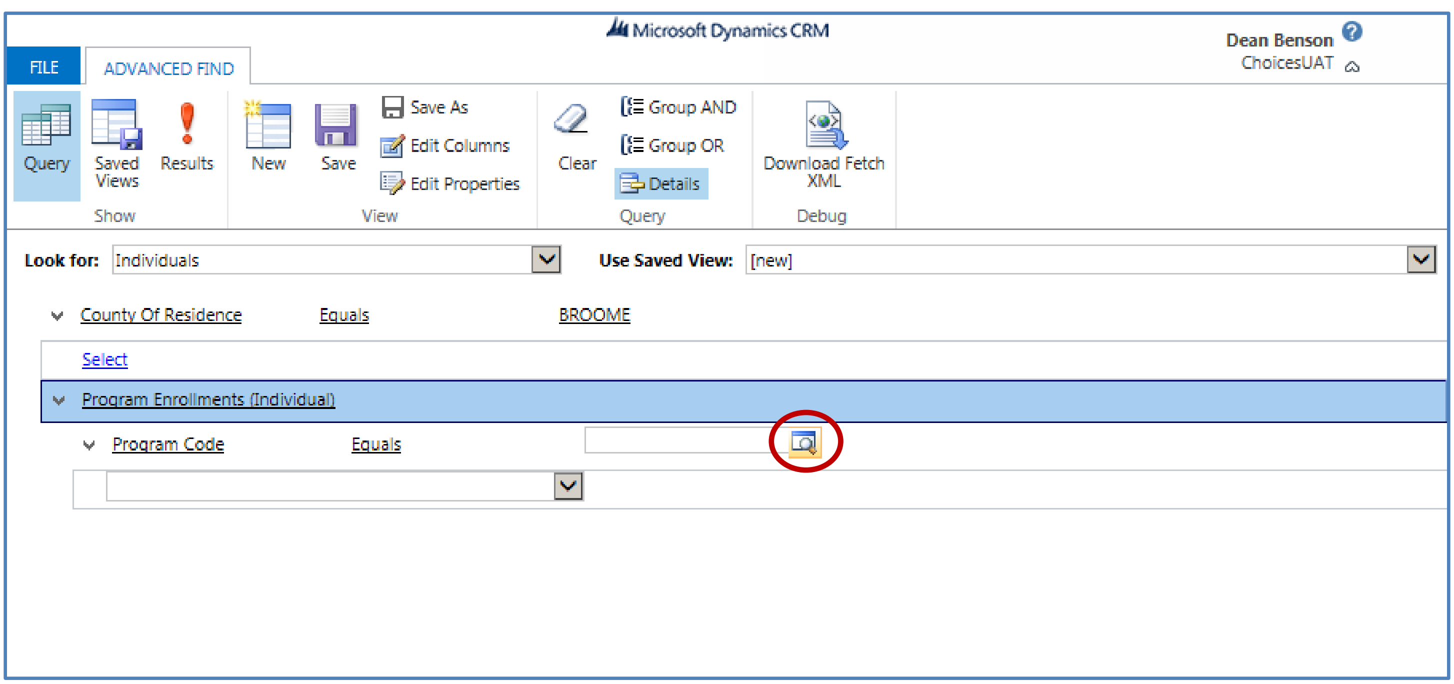

For the example, “Program Enrollments” is selected because it is a record type related to the record type “Individuals.”



8. The fields for “Program Enrollment (Individual)” can now be selected as additional criteria.  For the example, select the field “Program Code.”

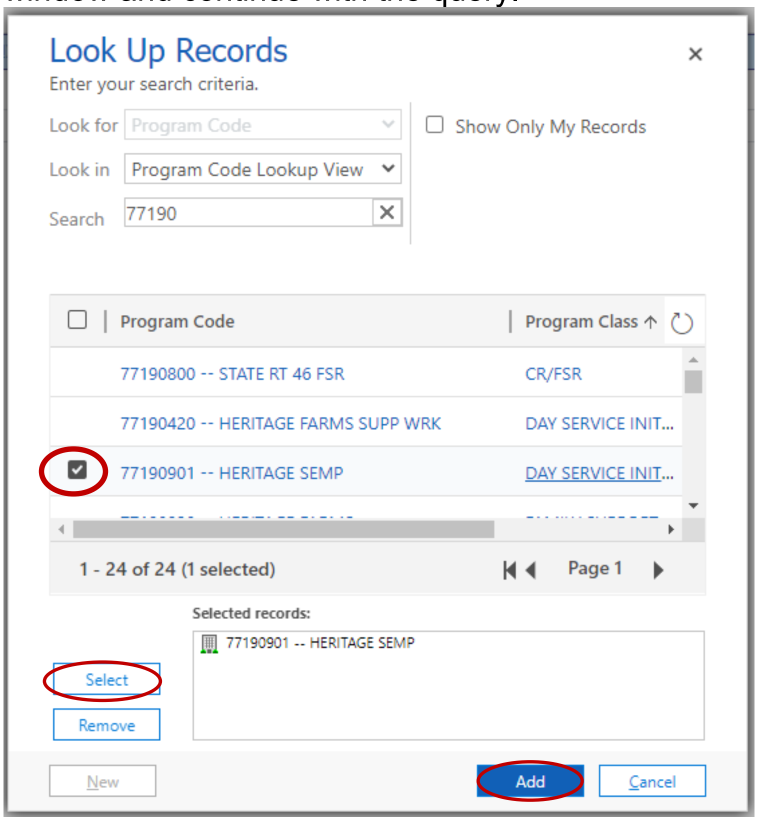



9. Click on the Search icon to bring up the Look Up Records dialog box for all available values. The formula will kept to the the default of “Equals” for the example.

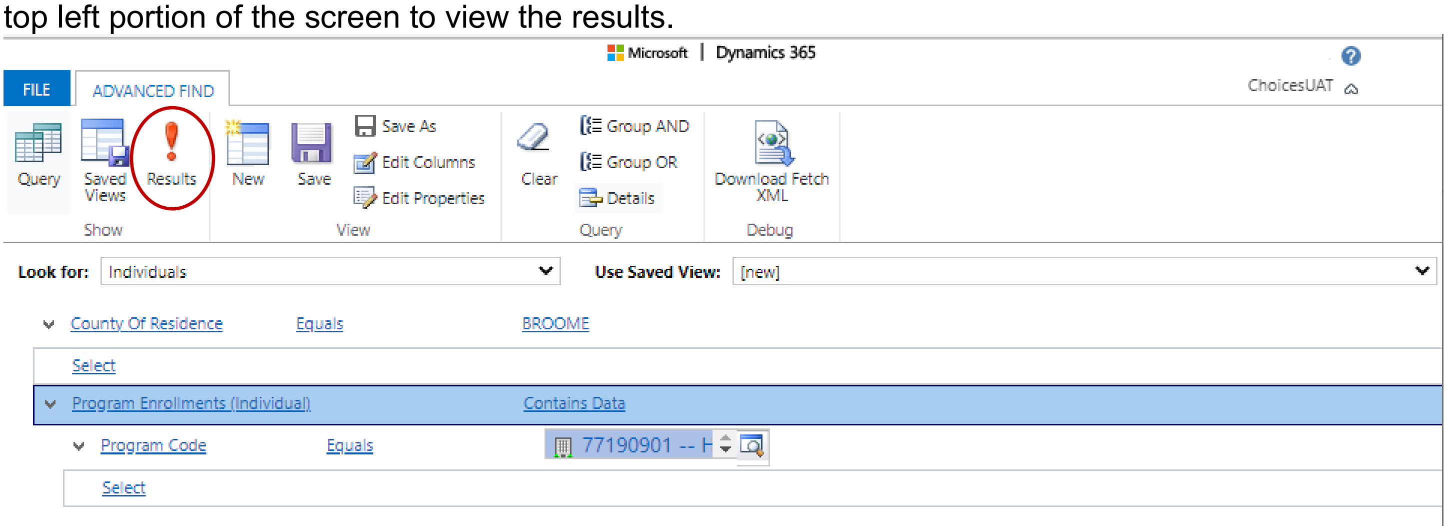


10. In the Look Up Records dialog box, search for the Program Code by typing part or all of the program code in the Search field. For this example, “77190901” is chosen.

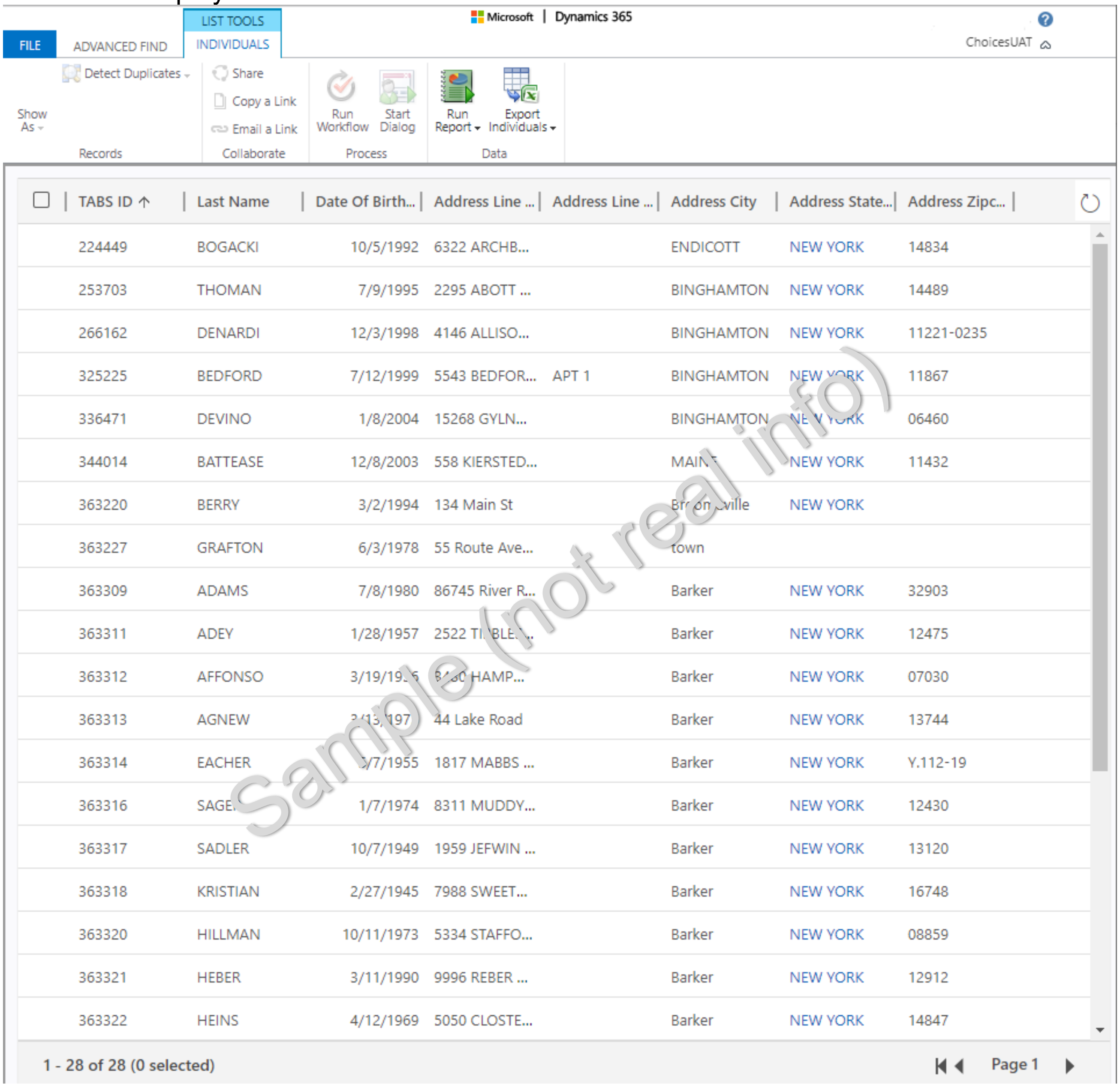
    Click on the checkbox to highlight the correct Program Code and then click the “Select” button to add the value to your selection. Click the “Add” button to go back to the Advanced Find window and continue with the query.




When all of the criteria has been selected, click on the “Results” button (red exclamation point) in the top left portion of the screen to view the results.

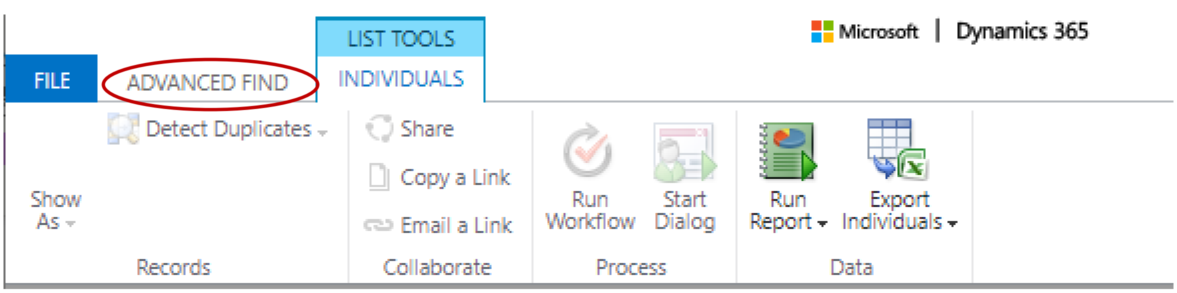


All records display that match the criteria selected in Advanced Find.



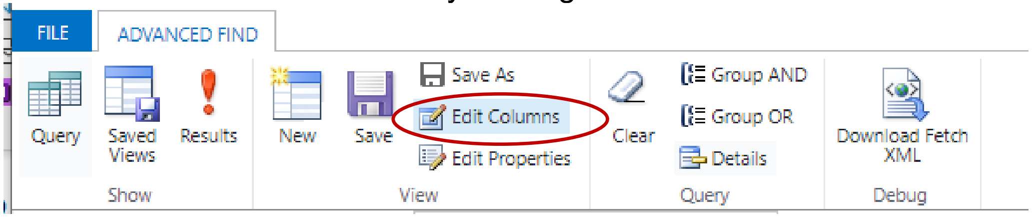

| TABS ID | Last Name | Date Of Birth... | Address Line ... | Address Line ... | Address City | Address State... | Address Zipc... |
|---|---|---|---|---|---|---|---|
| 224449 | BOGACKI | 10/5/1992 | 6322 ARCHB... | | ENDICOTT | NEW YORK | 14834 |
| 253703 | THOMAN | 7/9/1995 | 2295 ABOTT ... | | BINGHAMTON | NEW YORK | 14489 |
| 266162 | DENARDI | 12/3/1998 | 4146 ALLISO... | | BINGHAMTON | NEW YORK | 11221-0235 |
| 325225 | BEDFORD | 7/12/1999 | 5543 BEDFOR... | APT 1 | BINGHAMTON | NEW YORK | 11867 |
| 336471 | DEVINO | 1/8/2004 | 15268 GYLN... | | BINGHAMTON | NEW YORK | 06460 |
| 344014 | BATTEASE | 12/8/2003 | 558 KIERSTED... | | MAIN[illegible] | NEW YORK | 11432 |
| 363220 | BERRY | 3/2/1994 | 134 Main St | | Br[illegible]ville | NEW YORK | |
| 363227 | GRAFTON | 6/3/1978 | 55 Route Ave... | | town | | |
| 363309 | ADAMS | 7/8/1980 | 86745 River R... | | Barker | NEW YORK | 32903 |
| 363311 | ADEY | 1/28/1957 | 2522 T[illegible]BLE... | | Barker | NEW YORK | 12475 |
| 363312 | AFFONSO | 3/19/19[illegible] | [illegible] HAMP... | | Barker | NEW YORK | 07030 |
| 363313 | AGNEW | [illegible]/13/197[illegible] | 44 Lake Road | | Barker | NEW YORK | 13744 |
| 363314 | EACHER | [illegible]/7/1955 | 1817 MABBS ... | | Barker | NEW YORK | Y.112-19 |
| 363316 | SAGE[illegible] | 1/7/1974 | 8311 MUDDY... | | Barker | NEW YORK | 12430 |
| 363317 | SADLER | 10/7/1949 | 1959 JEFWIN ... | | Barker | NEW YORK | 13120 |
| 363318 | KRISTIAN | 2/27/1945 | 7988 SWEET... | | Barker | NEW YORK | 16748 |
| 363320 | HILLMAN | 10/11/1973 | 5334 STAFFO... | | Barker | NEW YORK | 08859 |
| 363321 | HEBER | 3/11/1990 | 9996 REBER ... | | Barker | NEW YORK | 12912 |
| 363322 | HEINS | 4/12/1969 | 5050 CLOSTE... | | Barker | NEW YORK | 14847 |

11. To return to your query click on the Advanced Find Tab



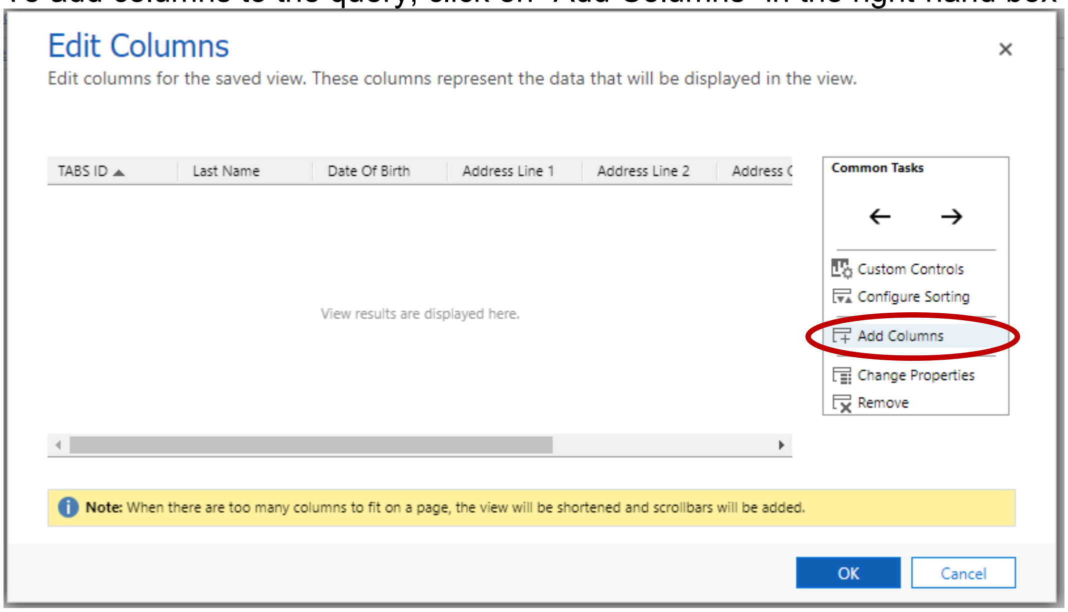
### Adding Columns to Query Results

You can add or delete additional information, called adding columns, to show in the results of a query in the Advanced Find window by clicking on the “Edit Columns” button.

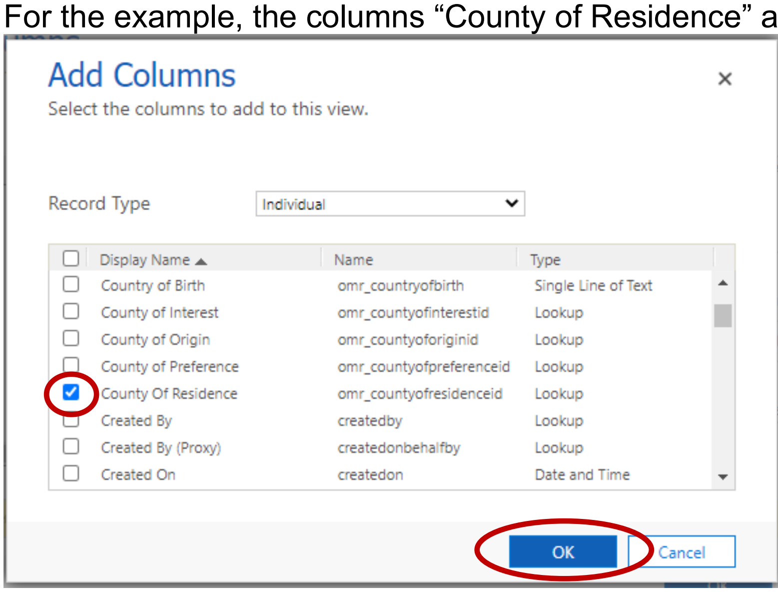



The Edit Columns dialog box will pop up with editing options that you can select in the right-hand box titled “Common Tasks”.

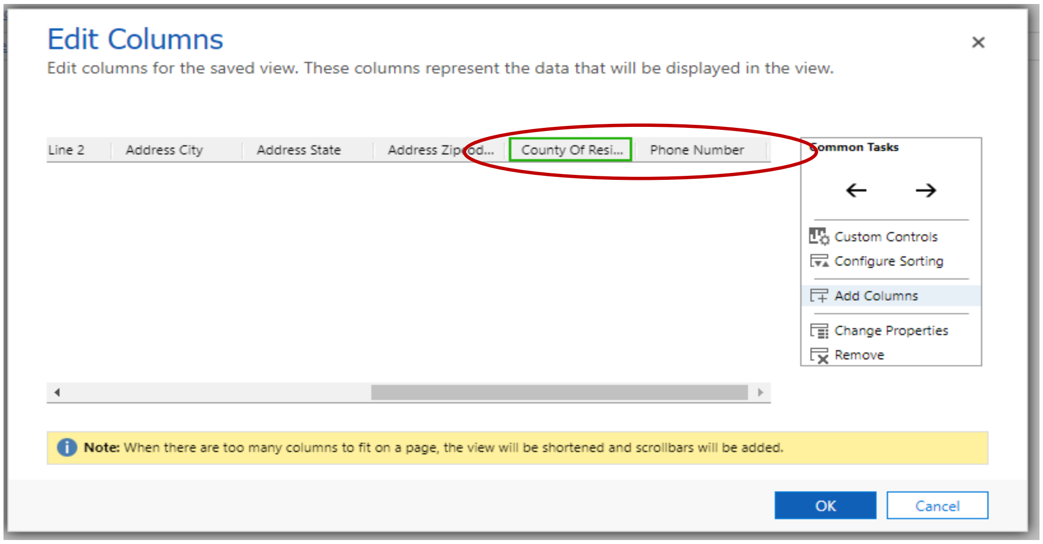
1. To add columns to the query, click on “Add Columns” in the right-hand box of the dialog box.



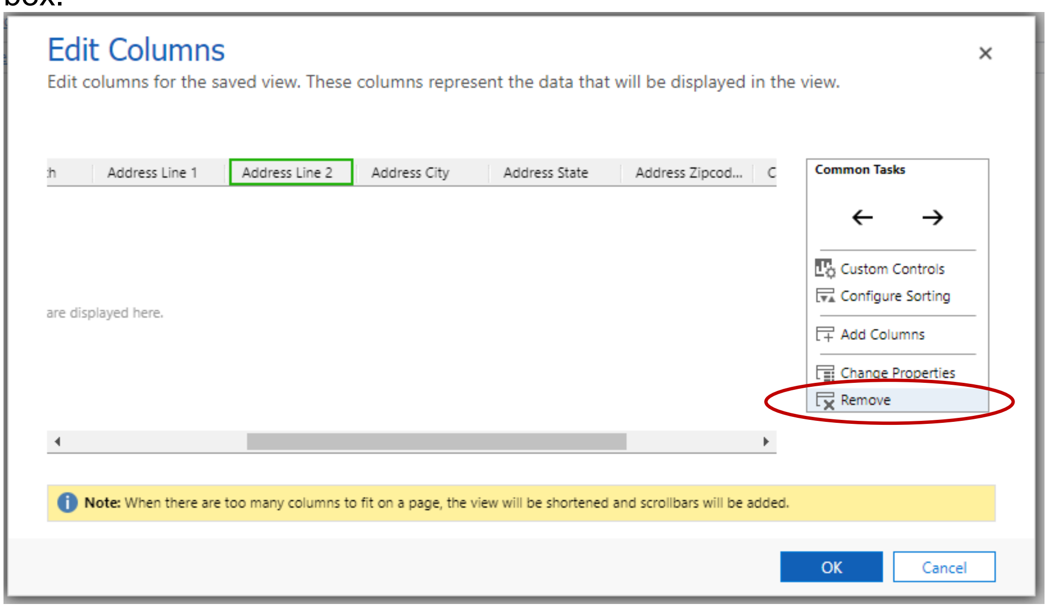

2. The Add Columns dialog box will appear, allowing selection of one or more columns to add to your query. Scroll to find the fields that you want to add to your results and click in the left hand box to select the field. When finished, Click the “OK” button when you are done.
For the example, the columns “County of Residence” and “Phone Number” were selected.



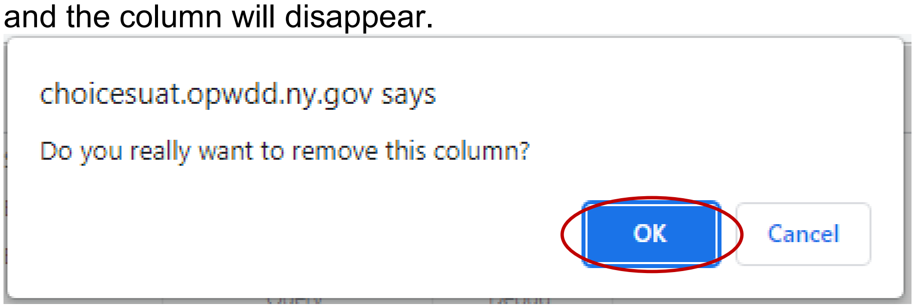
3. The selected columns now appear in the list of columns in the Edit Columns dialog box. As shown below.



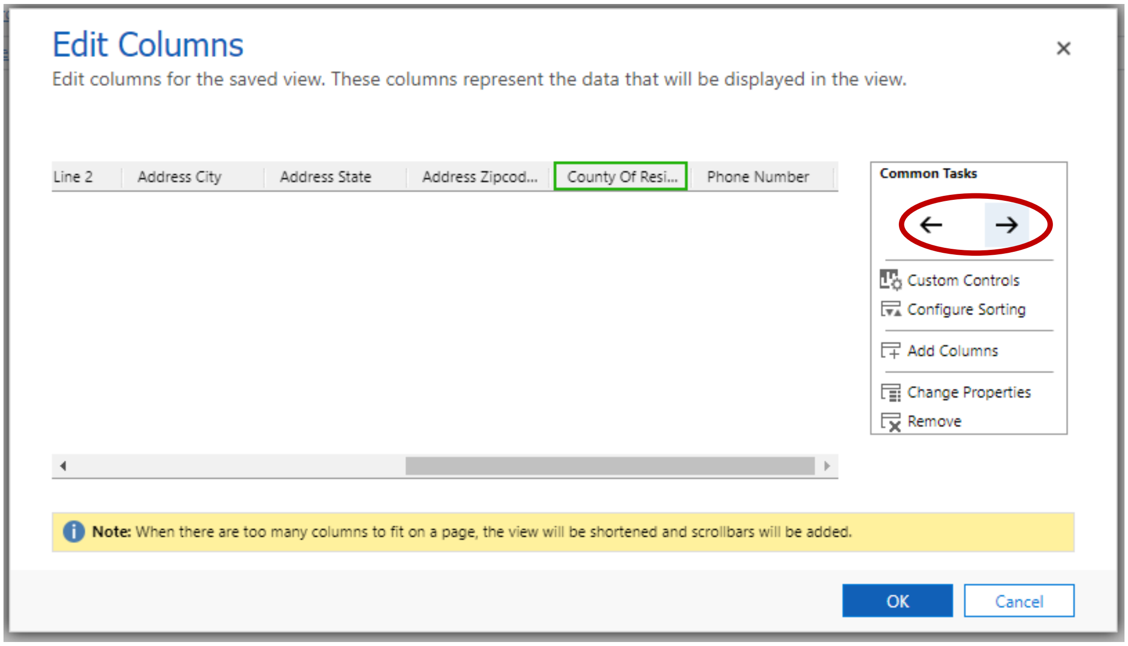

4. To remove any column from the query, click on that column name in the Edit Columns dialog box so it has a **green** box around it and then click "Remove" located in the Common Tasks box.



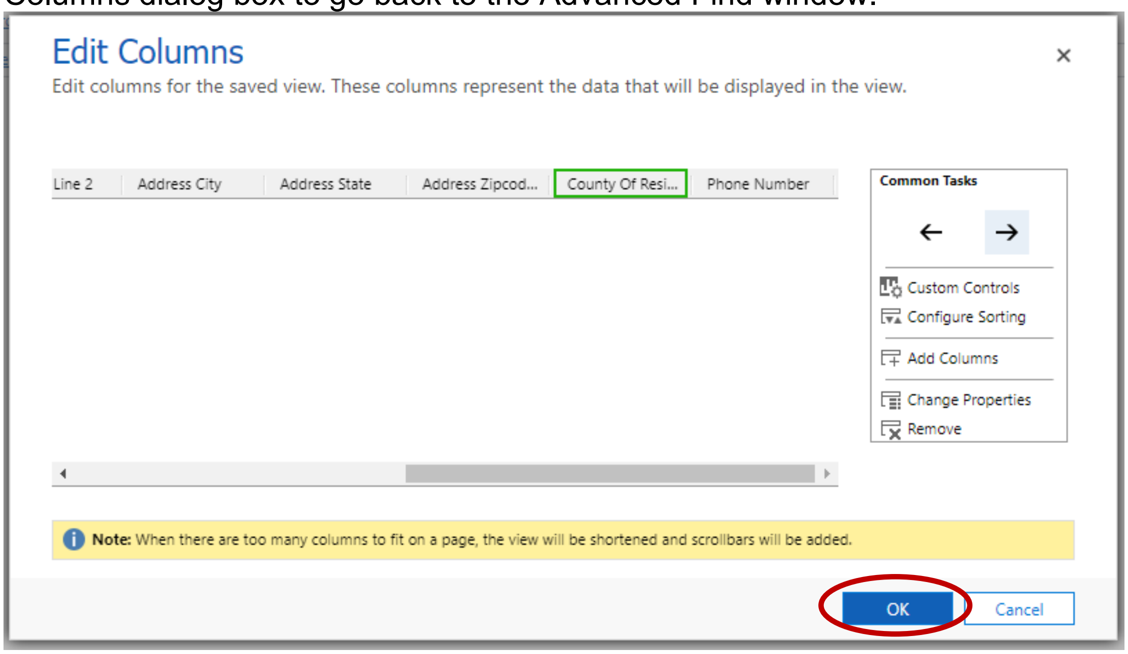

5. A dialogue box will appear asking to confirm that you want to remove the column. Click Ok and the column will disappear.



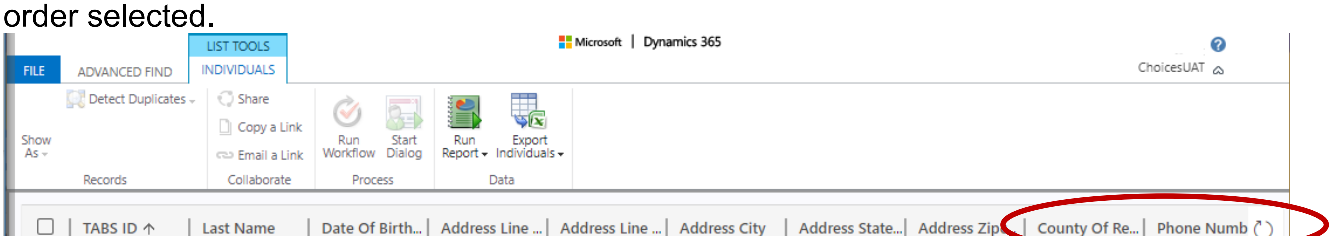
6. To rearrange the order of the columns, click on a column name so it has a green box around it. Then click on either of the arrow buttons under Common Tasks to move that column.




7. When the columns of the query are arranged accordingly, click the "OK" button in the Edit Columns dialog box to go back to the Advanced Find window.

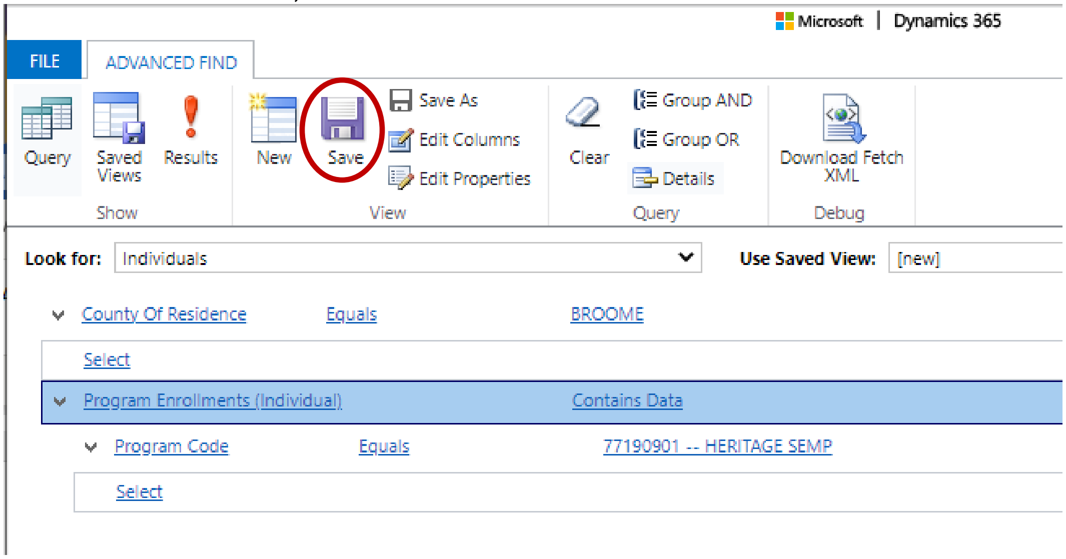



8. Click on the "Results" button in the Advanced Find window to see the added columns in the order selected.

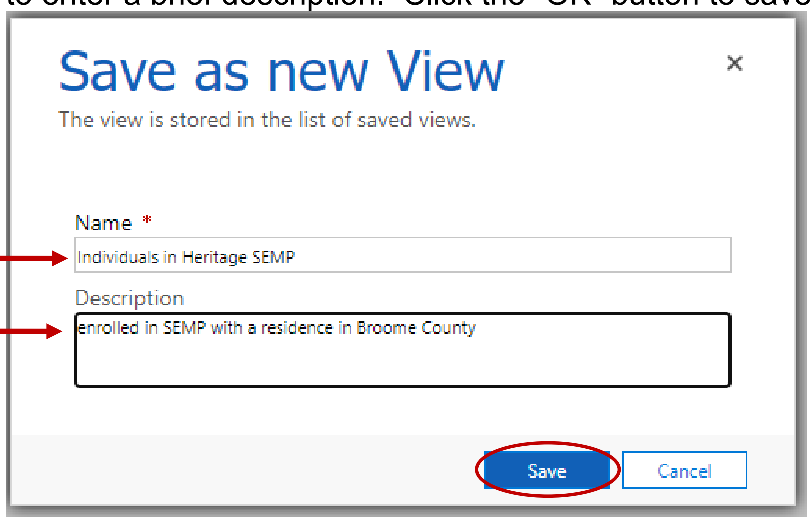


### Saving a Query

To save a query, also known as a Saved View, for future use without having to recreate it, in the "Advanced Find" tab, click on the "Save" button.

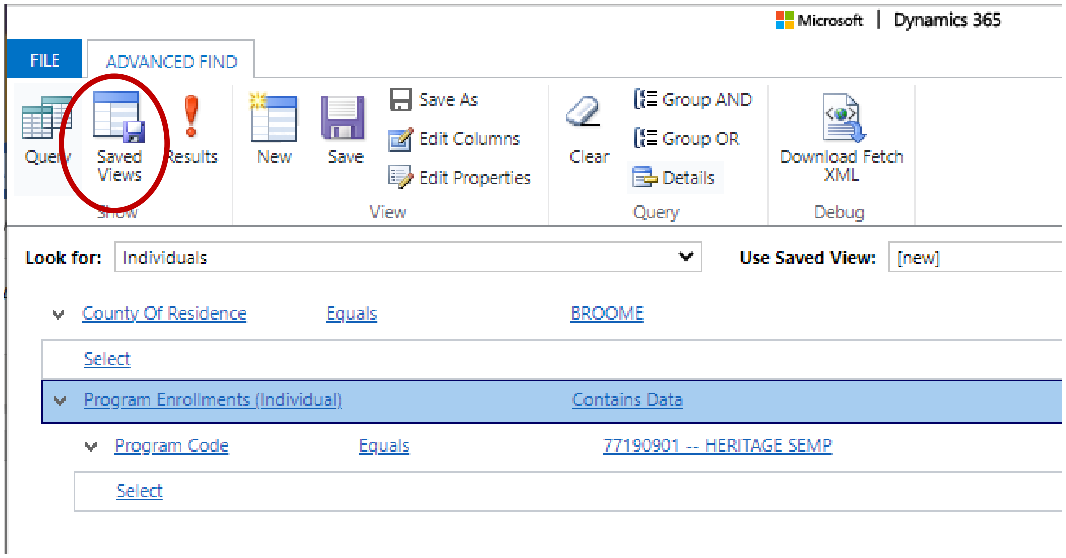



9. The Save as new View dialog box will pop up. Enter a name for the query/view. It is optional to enter a brief description. Click the "OK" button to save the query as a View for future use.

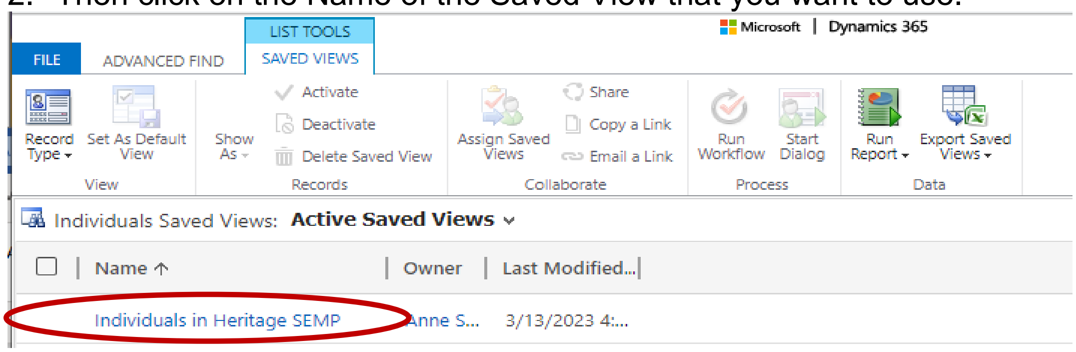


## Finding a Saved Query

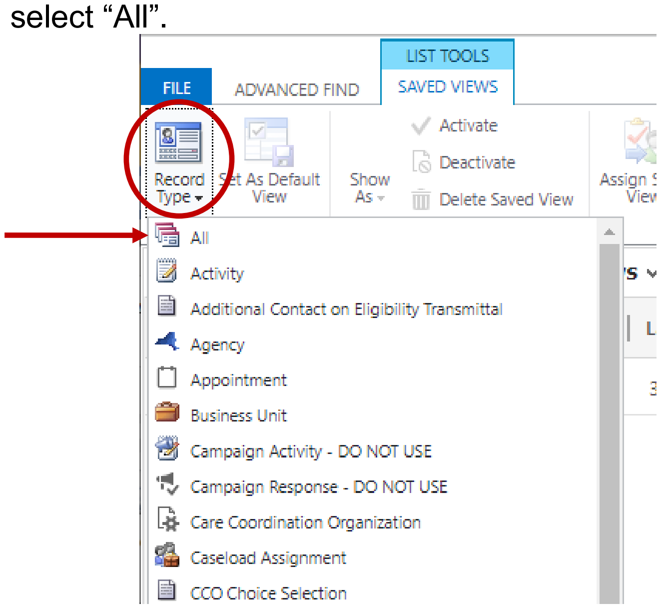
1. To access the saved query/view, or any other previously Saved Views within that Record Type. For the example, the Record Type is Individuals. Click on the “Saved Views” button in the “Advanced Find” tab.



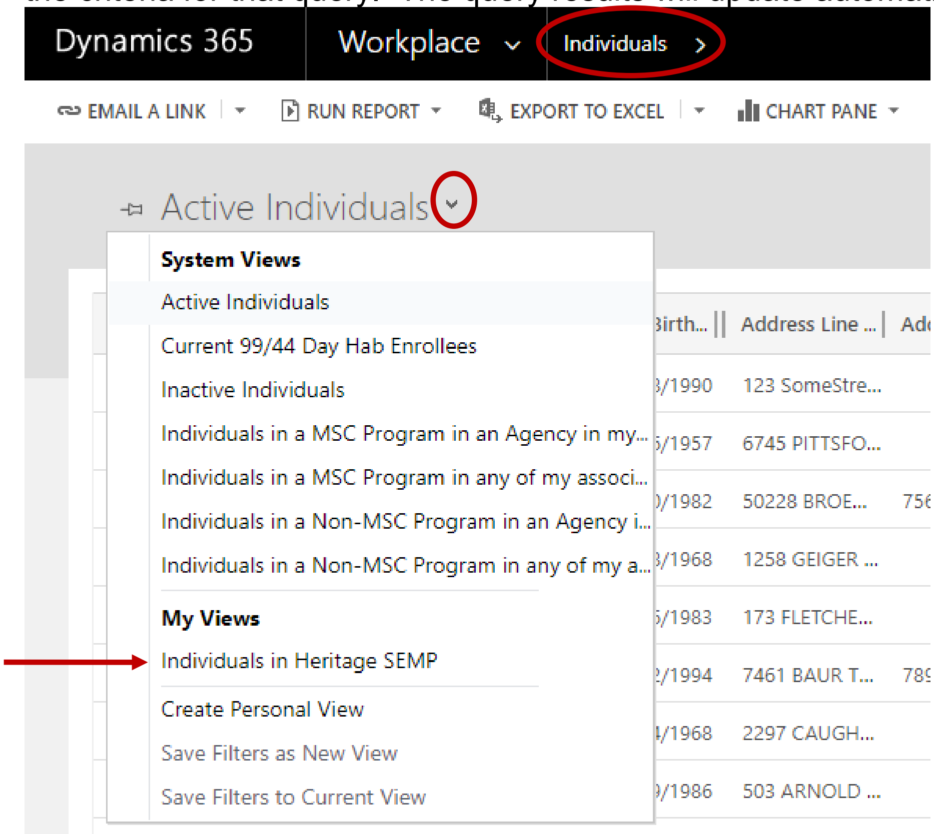

2. Then click on the Name of the Saved View that you want to use.




Note: the default view is for saved queries only within that Record Type. To see all Saved Views in all Record Types, click on the “Record Type” button in the upper left corner of the Saved Views tab and select “All”.



A Saved View may also be found by using the drop-down list under "My Views" for that particular Record Type. For the example, this is Individuals. Select the View to display the records that match the criteria for that query. The query results will update automatically as data changes.

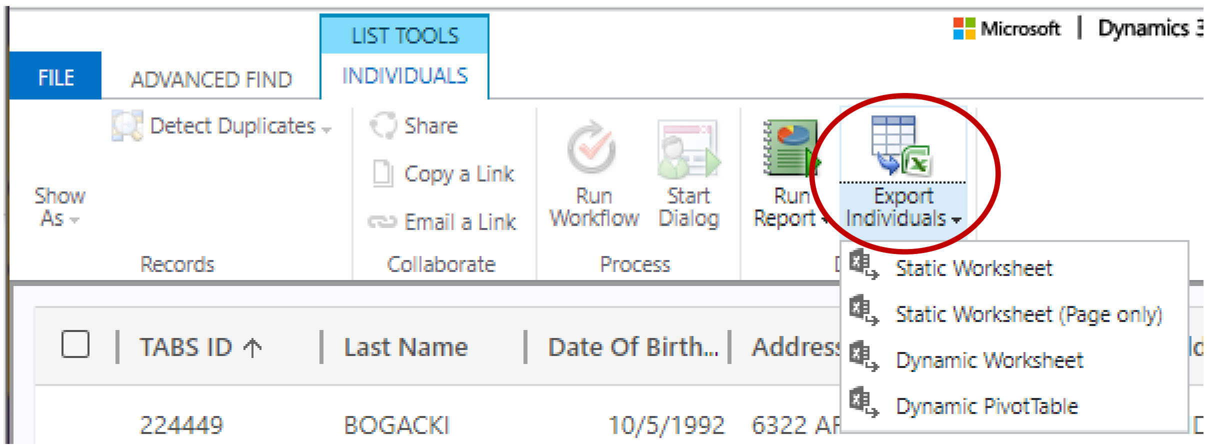


**Exporting to Excel**

Results can be exported to a Microsoft Excel spreadsheet. Note that the rows of data that can be exported are limited to 100,000. You may need to adjust your query if results exceed this amount.

1. To perform this function, click on the "Export Individuals" button. And click on one of the first three options (these are explained below).

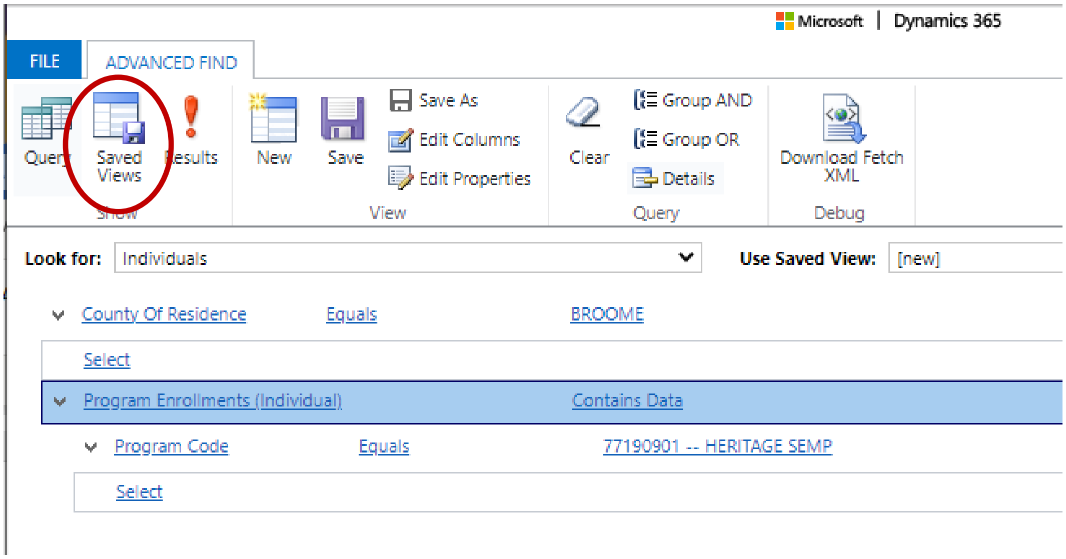
   The four options are:
   1) Static worksheet: Choose this to export all rows of data from all pages.
   2) Static worksheet (Page only): This option returns only the data on that specific page.
   3) Dynamic Worksheet: Brings up the Edit Columns dialogue box so that additional columns can be added one time to the Excel file.
   4) Dynamic PivotTable: This option is not available.



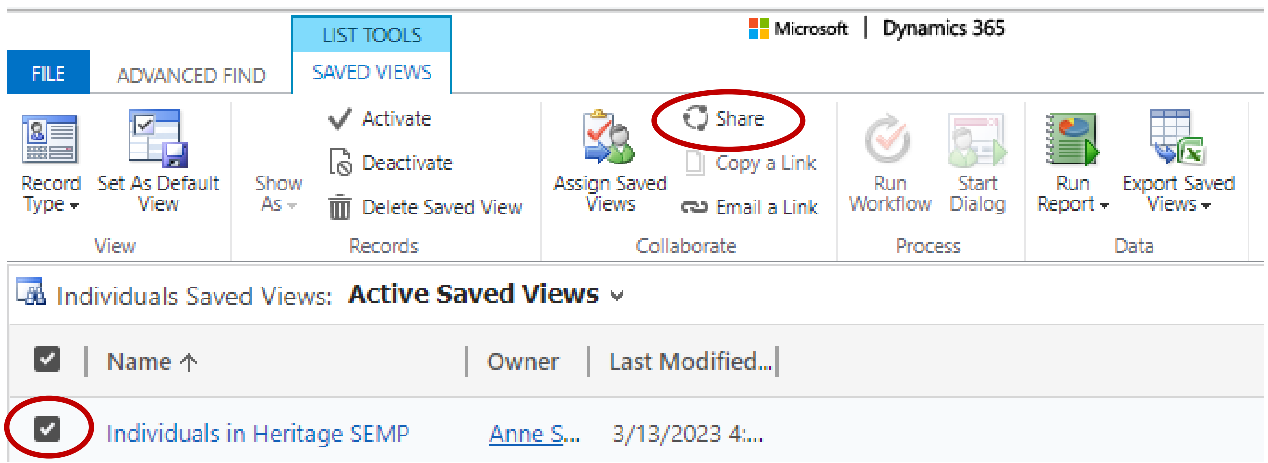

The file will download. The browser and/or Microsoft Excel version being used will determine how the file will download and where it will be saved.

## Sharing a Saved View

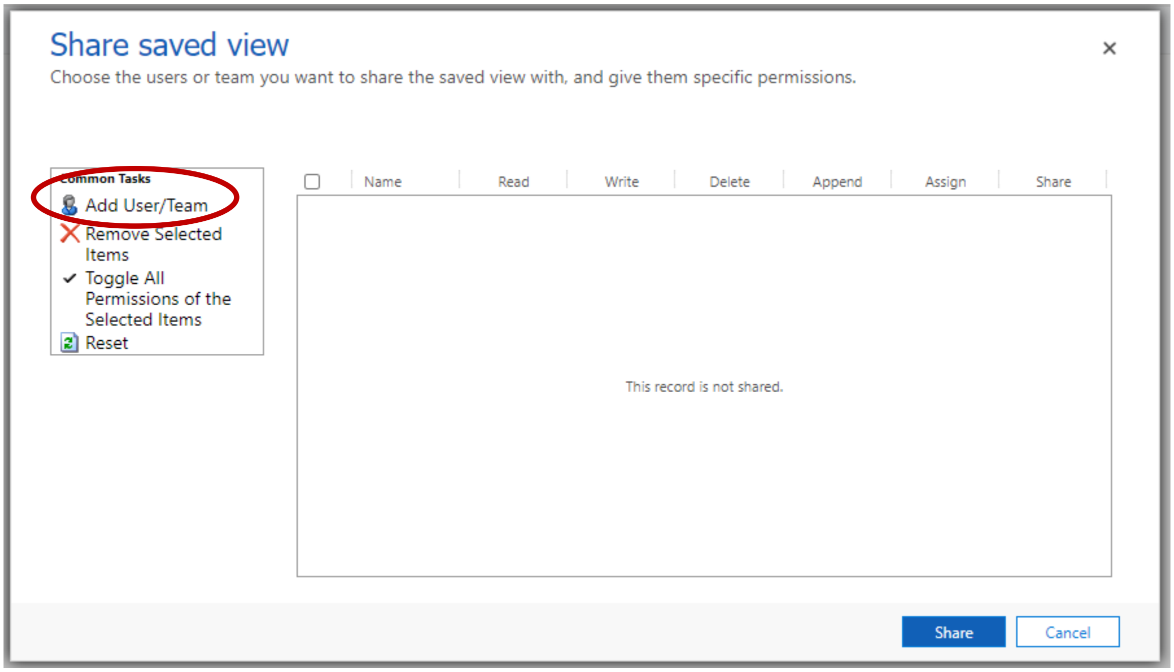
1. To share a Saved View (i.e. query) with another CHOICES user, click on the “Saved Views” button in the “Advanced Find” tab.



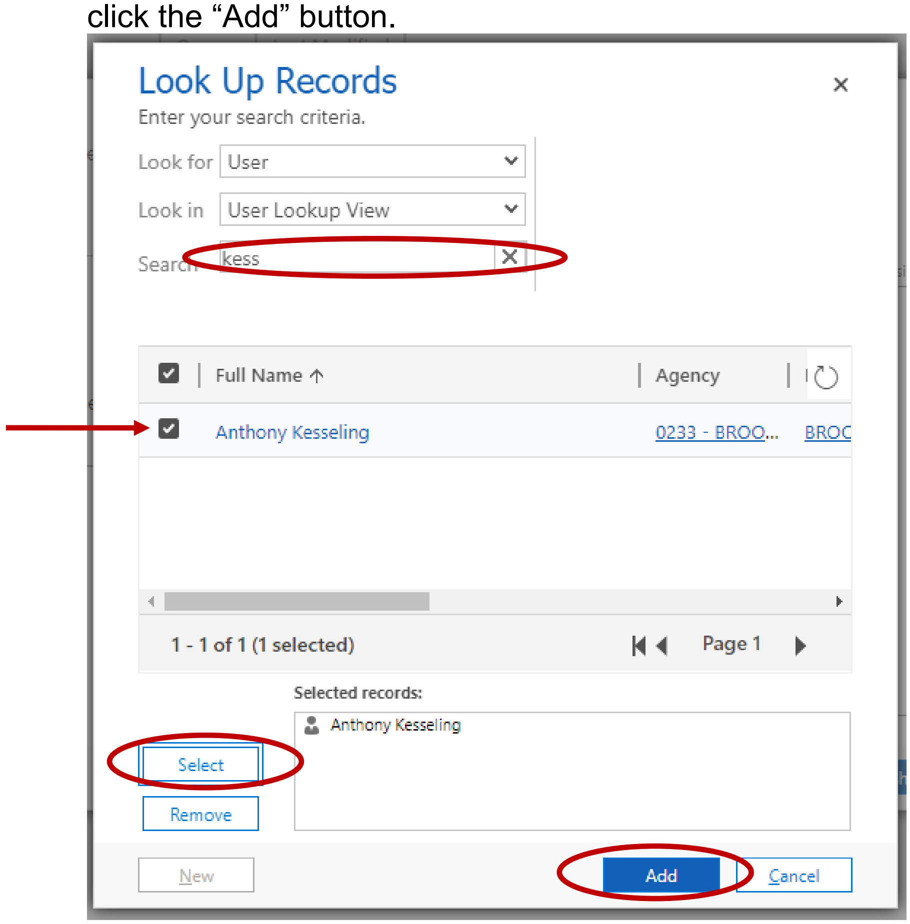

2. Click the saved view that you want to share next to the name. Then click the “Share” icon at the top center of the Advanced Find window.



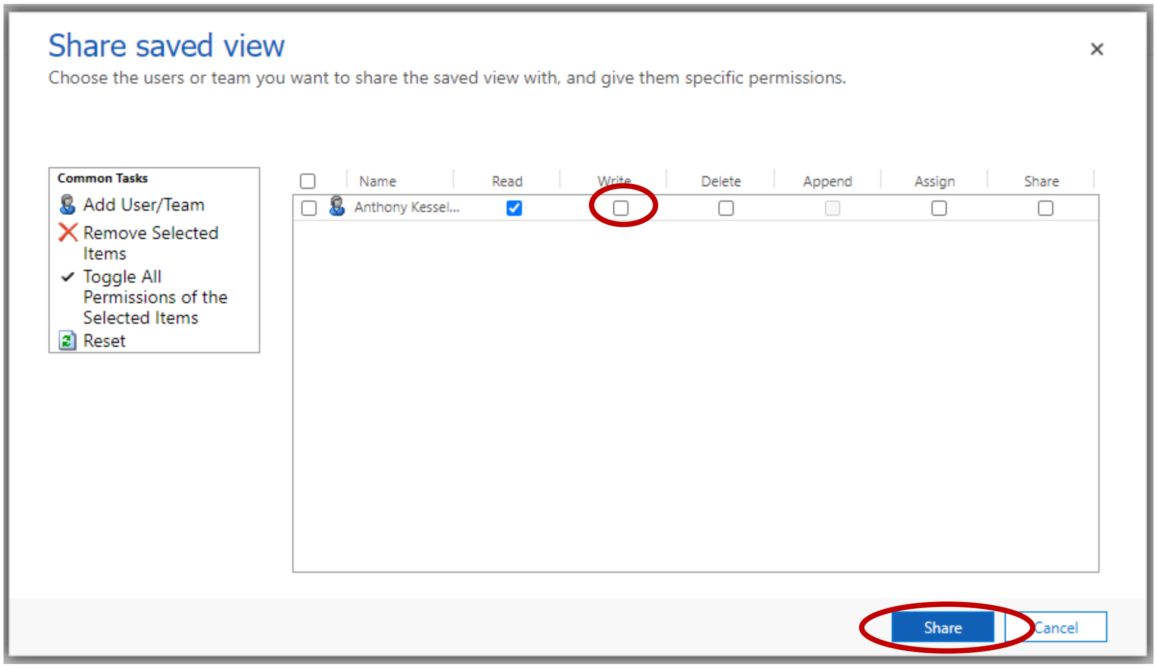
3. The Share Saved View dialog box will appear. In the left-hand box titled “Common Tasks,” click on “Add User/Team.




4. A Look Up Records dialog box will appear allowing you to search for and select a user. Type the first or last name of the User in the “Search” field, and then click the Search icon. Click next to the name of the user and then click “Select” to add it to the “Selected records”. Then click the “Add” button.



5. The user selected appears in the Share Saved View dialog box. Access defaults to Read only which allows them to view the query only. Additional rights can be selected, by clicking on the box under the heading. To allow them to modify the query, click under Write. When finished click on Share.




6. To remove the User from having any access to the Saved View, select that User's name in the Share saved view dialog box, click the checkbox next to their name, and then click "Remove Selected Items" in the "Common Tasks" box.