

# How to Save Lookups in Advance

Entering search criteria to find a prospect or generate a report is one of the most common activities in Advance. Some searches can be quite detailed. Advance allows you to save your searches to be used or modified later.

## **Saving a Search**

- 1) Enter criteria for a Lookup. The screen print search will find alums in the class of 2001 or later with a preferred address in Davis. Press the Search button.

1



Lookups

- Saved Criteria...
- ▶ Biographic
- ▶ Gift
- ▶ Prospect Tracking
- ▶ Membership
- ▶ Resource
- ▶ Miscellaneous
- Add Person
- Add Organization
- Entity Update

Lookups Actions

1. Choose a template (optional) Bio - Entity  
2. Select results format\* Entity Lookup List  
3. Select output type\* Display results/Open on exact match  
4. Select additional criteria from page tree (optional)  
5. Enter criteria below and click Search

View Criteria Clear

3



ID Lookup (70037) Help

ID =  
Alt ID =

Entity Lookup (70036) Help

'Sounds Like'

Last/Org Name Begins with  
First Begins with  
Middle Begins with  
Name Type = (All)  
Record Status = (All)  
Primary Record Type = (All)  
School = (All)  
**Class > 2000**  
Subject Code =  
Lookup = (All)  
Affiliation Code = (All)  
Affiliation Status = (All)  
Deleted = Not Deleted

2

Address Lookup (70031) Help

**Preferred = Preferred**  
Type =  
**City = davis**  
State = (All)  
Country = (All)  
ZIP Code Begins with

## 2) Press Refine Search

The screenshot shows the CAL POLY Services Director interface. At the top, there is a navigation bar with the CAL POLY logo and user information: "Purge Cache Andy Adv. Services Director [Logoff]". Below this is a breadcrumb trail: "Home x Lookups x". The main content area is titled "Lookups" and contains the text: "You have entered 4 criteria. Your search resulted in 151 records. The number of records may delay the time to display them. Consider selecting a different output type." Below this text is a dropdown menu set to "Display results/Open on exact match". At the bottom of the main content area, there are three buttons: "New Search", "Refine Search" (highlighted with a red box), and "Continue". On the left side, there is a sidebar with "Saved Criteria..." and a list of categories: "Biographic", "Gift", "Prospect Tracking", and "Membershin".

## 3) Click Save on the View Criteria form.

The screenshot shows the CAL POLY Services Director interface at the "View Search Values" stage. The breadcrumb trail is "Home x Lookups x". The main content area is titled "Lookups - View Search Values" and contains a list of five steps: "1. Choose a template (optional)", "2. Select results format\*", "3. Select output type\*", "4. Select additional criteria from page tree (optional)", and "5. Enter criteria below and click Search". Below these steps are three buttons: "View Criteria", "Clear", and "Search". Below the buttons is a section titled "View Criteria (80782)" with a "Save" button highlighted by a red box. To the right of the "Save" button are "Actions" and "Help" links. Below this section is a table with the following data:

Category	( Field	Current Search Values )
QuickLook Bio - Entity	delete_ind	= N
QuickLook Bio - Entity	pref_class_year	> 2000
QuickLook Bio - Address	addr_pref_ind	= Y
QuickLook Bio - Address	city	= davis

At the bottom right of the page, there is a "View SQL" button. The left sidebar is the same as in the previous screenshot, with "Saved Criteria..." and a list of categories: "Biographic", "Gift", "Prospect Tracking", "Membership", "Resource", and "Miscellaneous".

- 4) Click New on the Saved Criteria List form.  
Note: You can also delete previously saved searches using the Actions menu.

Home x Save Criteria x

**Lookups**

- Saved Criteria...
- ▶ Biographic
- ▶ Gift
- ▶ Prospect Tracking
- ▶ Membership
- ▶ Resource
- ▶ Miscellaneous
- Add Person
- Add Organization
- Entity Update

**Save Criteria** Actions

To create a new Saved Criteria List:

1. Press the New command.
2. Enter description information below
3. Select the Save command to save your changes

To replace an existing Saved Criteria list:

1. Select the Saved Criteria you wish to replace from the list below.
2. Modify the description information as needed
3. Select the Save command to save your changes

Press Cancel to return to the previous page without saving this criteria.

**Saved Criteria List (80725)** New Actions Help

Saved Criteria	Owner	Show

- 5) Type in Name and Description. Do not change the settings for Owner User Group or check the Public box. Click Save.

**1**

**2**

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1. Select the Saved Criteria you wish to replace from the list below.
2. Modify the description information as needed
3. Select the Save command to save your changes

Press Cancel to return to the previous page without saving this criteria.

**Saved Criteria List (80725)** Save Actions Help

Saved Criteria	Owner	Share
Feb15	Advancement Services	Public
	Advancement Services	Private

**Name\*** Young Alums in Davis

**Description\*** Class year > 2000

~~Owner User Group\*~~ AD

~~Public~~

## 6) Your Lookup is now saved!

**CAL POLY** Purge Cache Andy Adv. Services Director [Logout]

Home x Save Criteria x

**Lookups**

- Saved Criteria...
- ▶ Biographic
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Press Cancel to return to the previous page without saving this criteria.

**Saved Criteria List (80725)** Save New Actions Help

Saved Criteria	Owner	Share
Young Alums in Davis	Advancement Services	Private

**Name\*** Young Alums in Davis

**Description\*** Class year > 2000

**Owner User Group\*** AD

Public

# Retrieving a Search

- 1) Click the search icon. Click Saved Criteria. Highlight the Saved Criteria you want. Press OK.

The screenshot shows the CAL POLY system interface. At the top, the user is logged in as 'Andy Adv. Services Director'. The interface includes a navigation menu on the left and a main content area. Red annotations are used to highlight the steps in the instructions:

- 1**: Points to the search icon (binoculars) in the top navigation bar.
- 2**: Points to the 'Saved Criteria...' menu item in the left navigation pane.
- 3**: Points to a search entry in the 'Saved Criteria' list: 'Young Alums in Da...' with the description 'Class year > 2000'.
- 4**: Points to the 'OK' button at the bottom right of the interface.

Saved Criteria	Description	Owner	Share
Young Alums in Da...	Class year > 2000	AD	Private



2) You may now change the criteria or press the Search button.

The screenshot shows the CAL POLY website interface. At the top, there is a navigation bar with the CAL POLY logo and user information: "Purge Cache Andy Adv. Services Director [Logoff]". Below this is a breadcrumb trail: "Home x Lookups x".

The main content area is titled "Lookups - View Search Values" and includes an "Actions" link. It contains a list of instructions:

1. Choose a template (optional)
2. Select results format\* (Entity Lookup List)
3. Select output type\* (Display results/Open on exact match)
4. Select additional criteria from page tree (optional)
5. Enter criteria below and click Search

Below the instructions are "View Criteria" and "Clear" buttons. A "Search" button is highlighted with a red box.

The "View Criteria (80782)" section shows a table of search criteria:

Category	Field	Current Search Values
QuickLook Bio - Entity	delete_ind	= N
QuickLook Bio - Entity	pref_class_year	> 2000
QuickLook Bio - Address	addr_pref_ind	= Y
QuickLook Bio - Address	city	= davis

The first two rows of the table are highlighted with a red box.