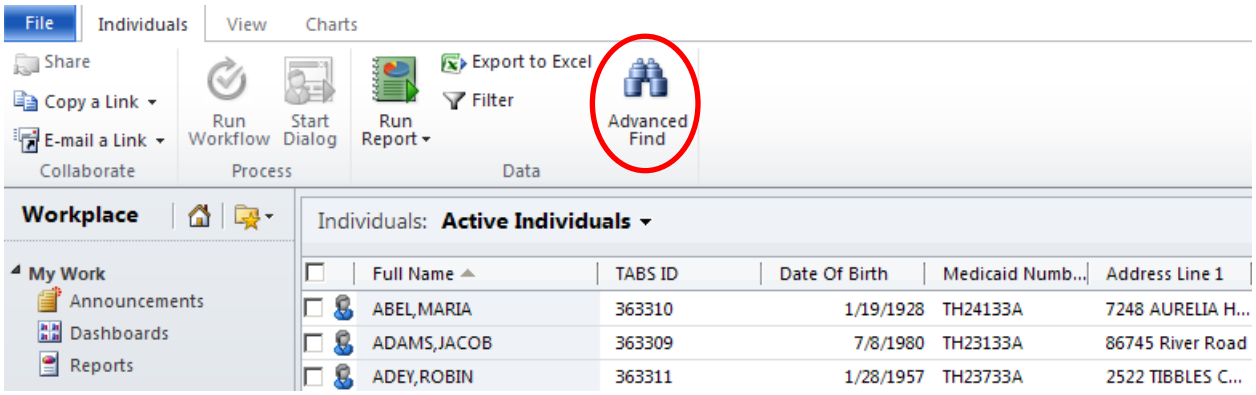
Advanced Find

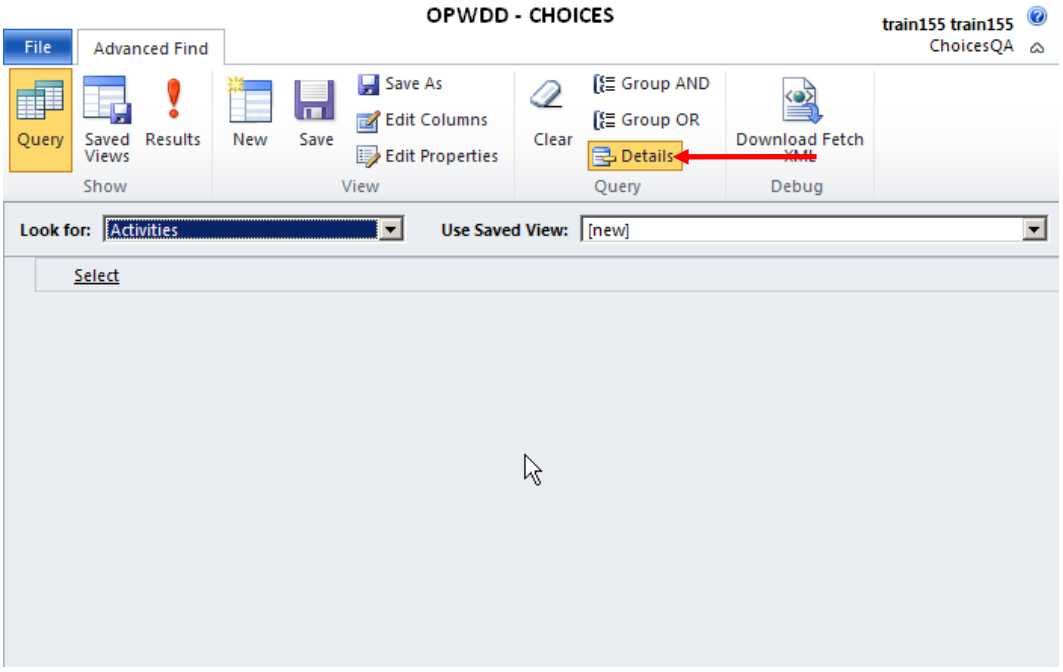
The Advanced Find feature is a powerful reporting tool in CHOICES that allows you to extract specific data that you need to see. It uses a query in which you define the criteria to filter the data and provide specific data set results. A query can be used to prepare data to export, which is dependent on Microsoft Excel for reporting functionality. Also, a query can be saved as a View in the “My Views” drop down for a particular section in CHOICES, and this View can be shared with other CHOICES Users.

Create Query

To create a query, click on the Advanced Find button (blue binoculars icon) in the top center portion of the main CHOICES window.



The Advanced Find pop-up window appears. Make sure the “Details” icon is highlighted (if not then click on it); this will allow you to select all the criteria you need.



Note: Please keep in mind that when you create a query, you will only be able to see information that you have access to, based on your role in CHOICES.

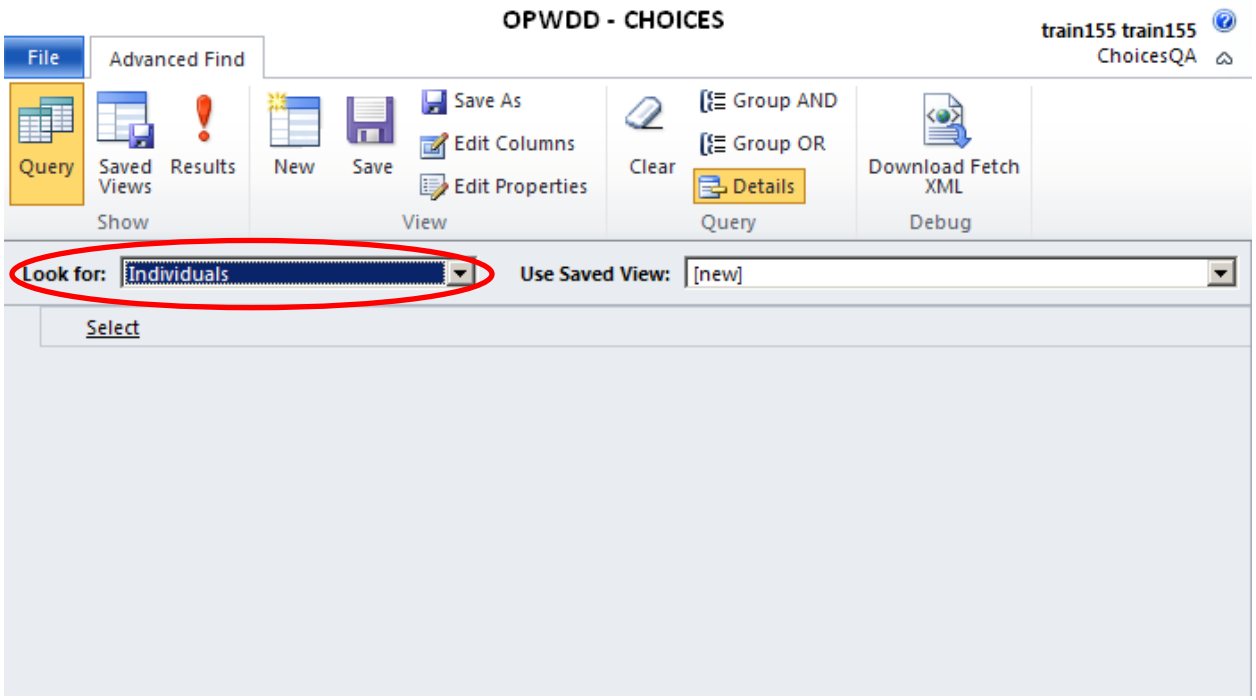
There are basically four quick steps to creating a query:

1. Record Type Selection
2. Field Selection
3. Formula Selection
4. Value Selection

The fields you select will depend on what Record Type you're working with. In this example, we'll create a query to view records of **Individuals** who reside in a certain **County** and who are enrolled in a certain **Program Code**.

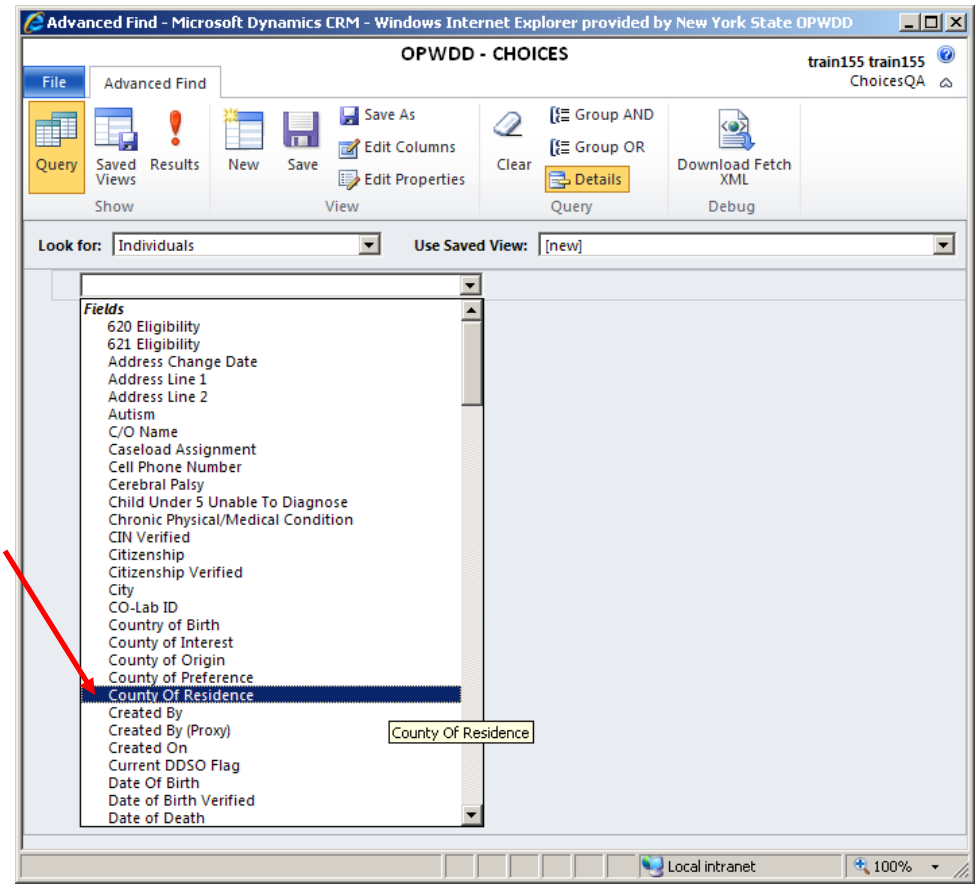
1. Record Type Selection

To start the query, select the Record Type you want to work with from the "Look for" drop down list. In this case, we will choose "Individuals".



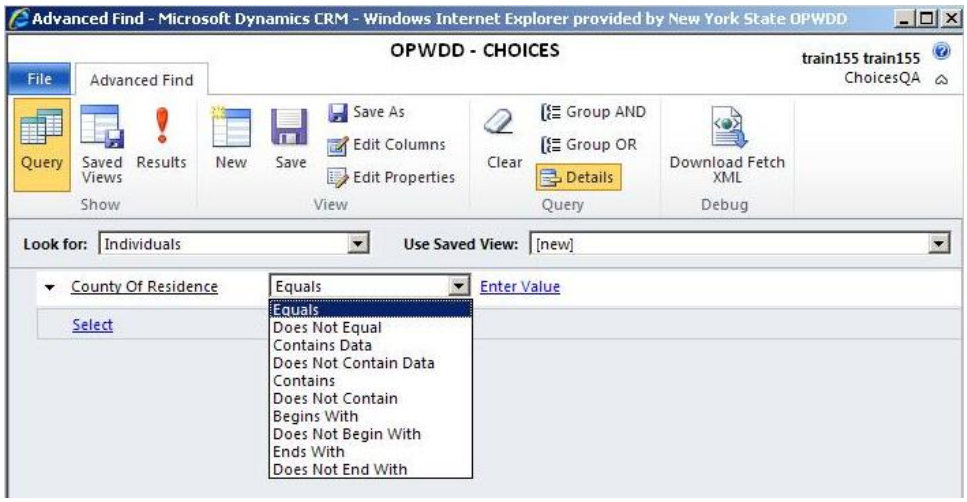
2. Field Selection

Next, we'll select the criteria for the fields. In this case, we'll select the "County of Residence" field first.



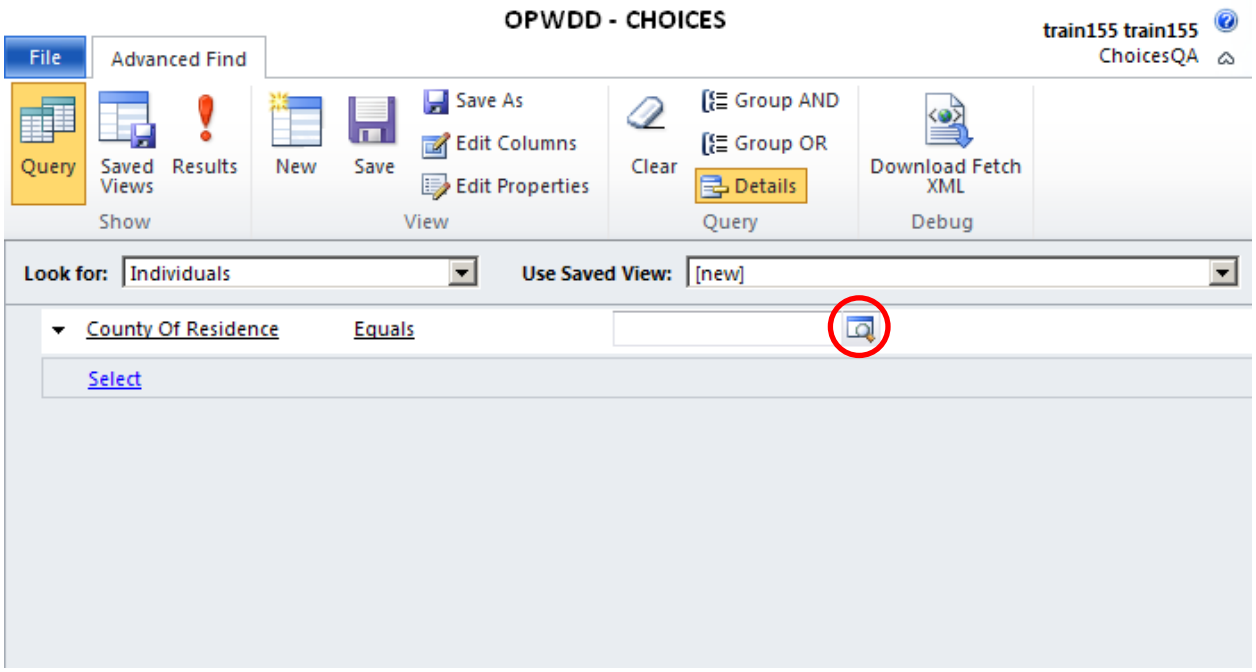
3. Formula Selection

The formula “Equals” is the default for any field, but you may click on the drop down arrow and change the formula to any other available option (e.g. “Contains”, “Begins With”, etc) In this case, we will keep the default of “Equals”.



4. Value Selection

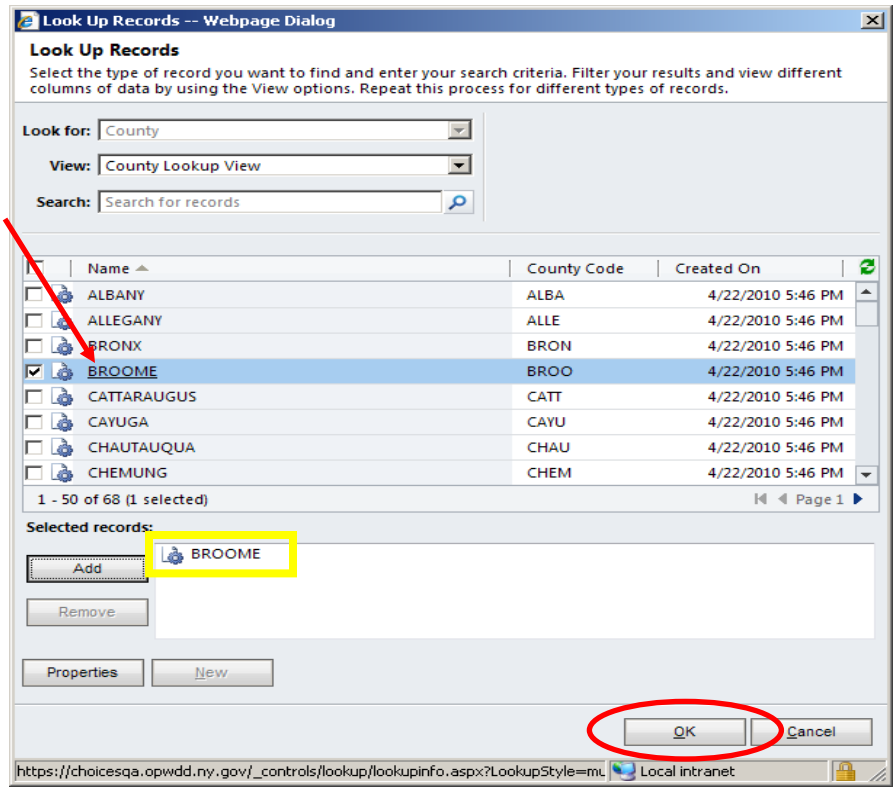
In order to enter a value for the County, you may type the name in the empty value field where it reads “Enter Value”, just be sure to spell it correctly or the query won’t yield any results. You can also click on the Search icon to bring up a Look Up Records dialog box for all available values.



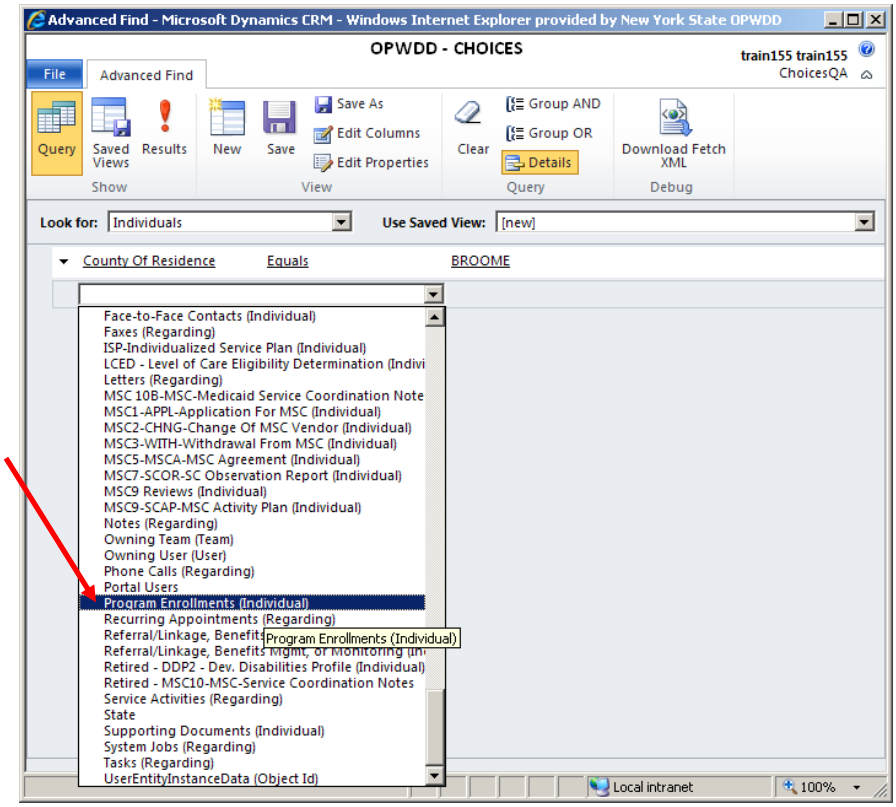
In the Look Up Records dialog box, search for the particular County by scrolling through the list, and then click on the appropriate selection. In this case, we’ll select “Broome”.

You may either click on the checkbox to highlight the appropriate County and then click the “Add” button to add the value to your selection, <u>or</u> you may simply click on the name of the County itself to add the value in one step.

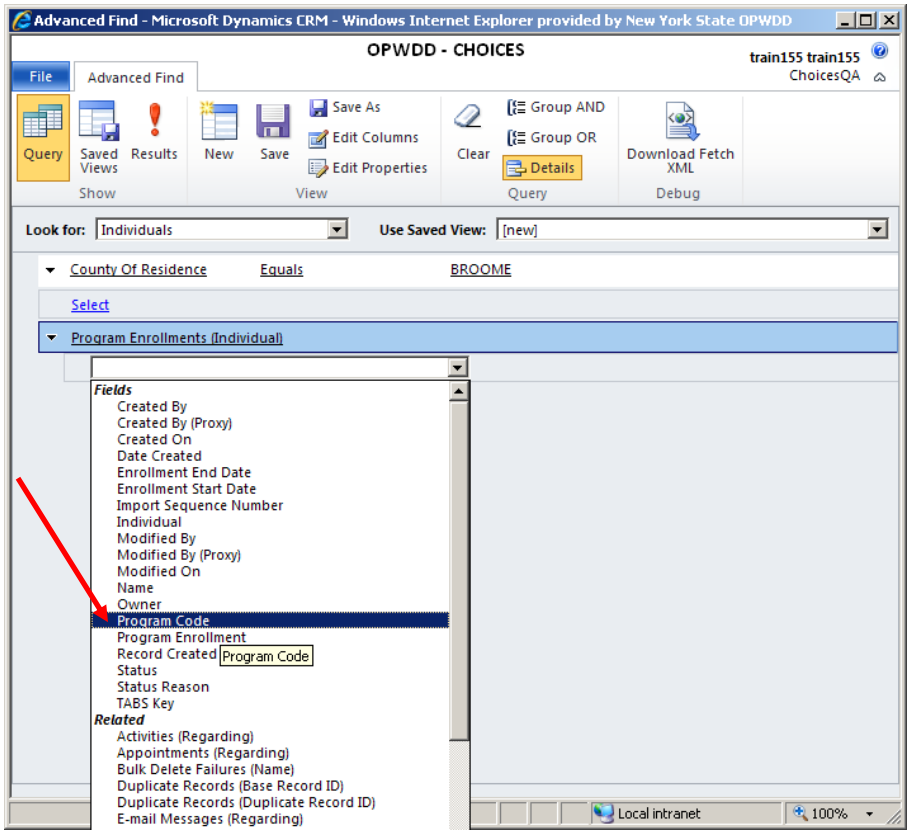
Click the “OK” button to go back to the Advanced Find window and continue with the query.



Now, in the Advanced Find window, we can repeat these four steps to select other criteria to further define our query. In this case, we'll select "Program Enrollments".

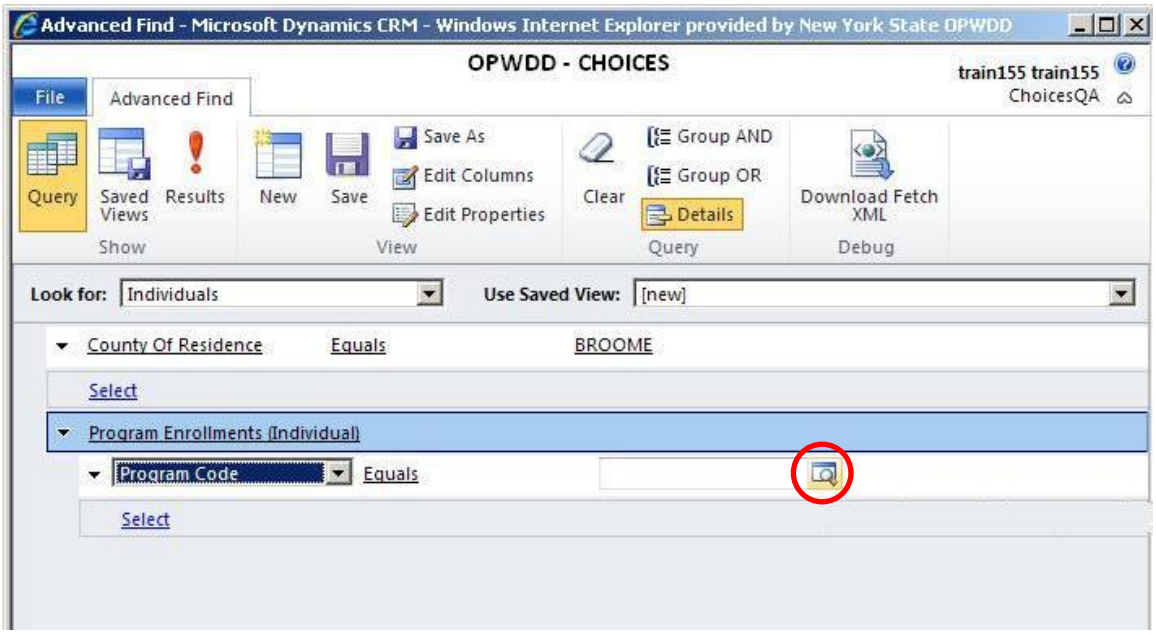


Next, in the drop down list below “Program Enrollment”, we’ll select the field “Program Code” because we need to specify which program we’re looking for.



In this case, we will keep the default formula of “Equals”.

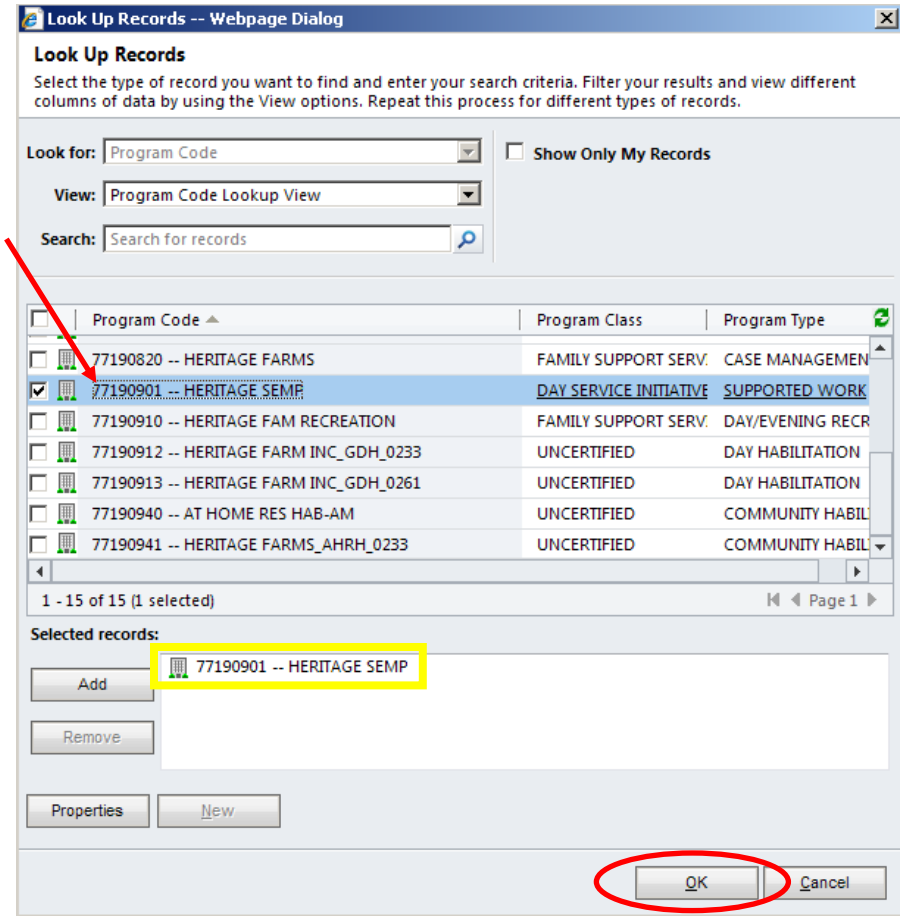
In order to enter a value for a specific Program Code, you may type the name in the empty value field where it reads “Enter Value”, just be sure to enter it correctly or the query won’t yield any results. You can also click on the Search icon to bring up a Look Up Records dialog box for all available values.



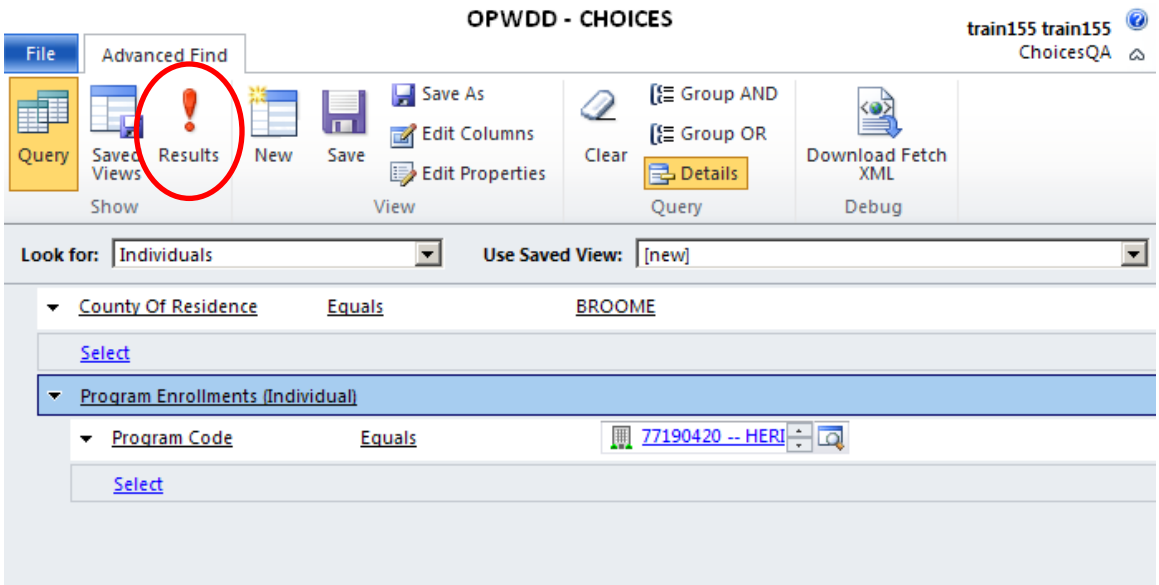
In the Look Up Records dialog box, search for the Program Code by scrolling through the list and then make the appropriate selection. In this case, we'll select "77190901 - Heritage SEMP".

You may either click on the checkbox to highlight the appropriate Program Code and then click the "Add" button to add the value to your selection, <u>or</u> you may simply click on the name of the Program Code itself to add the value in one step.

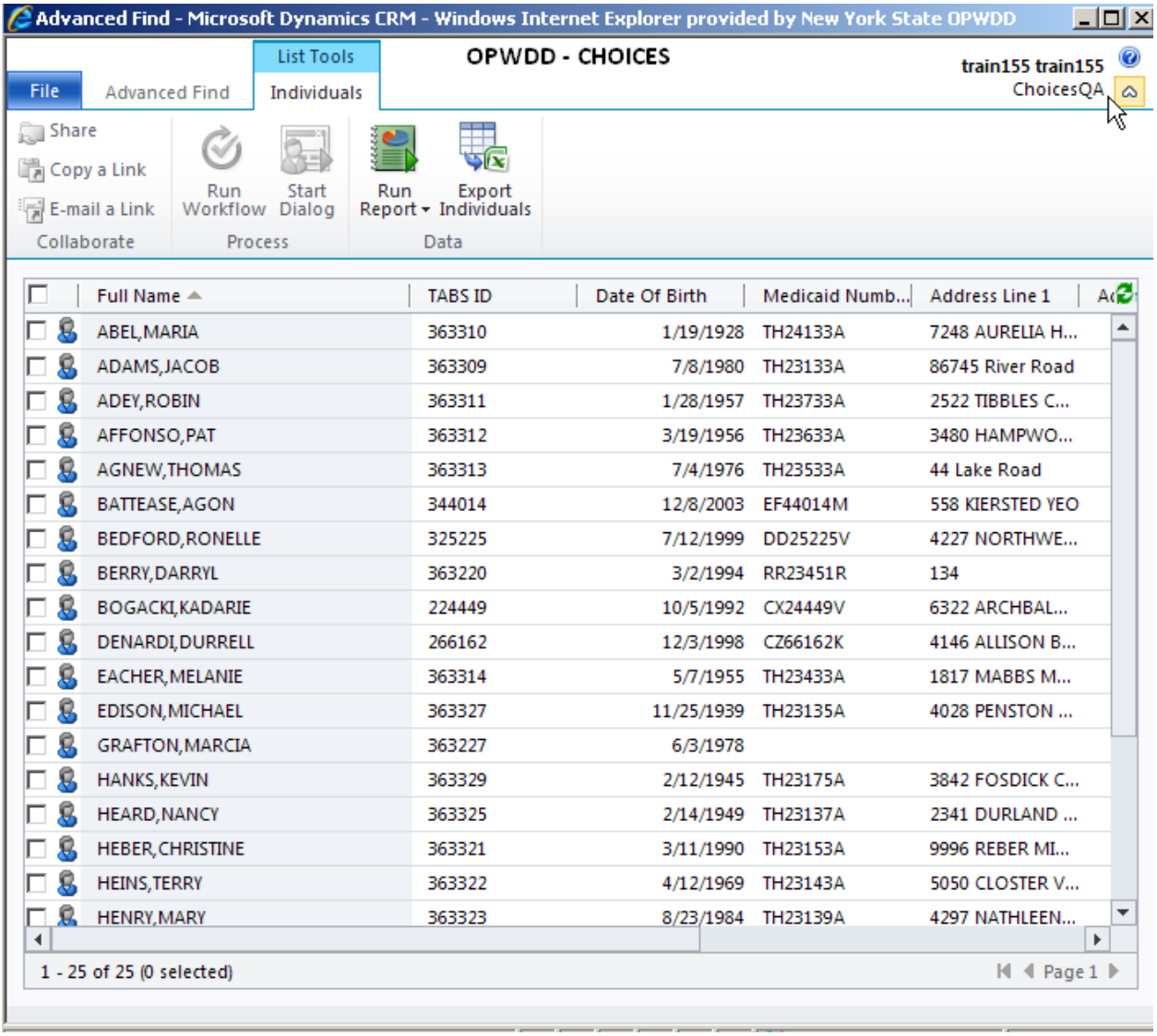
Click the "OK" button to go back to the Advanced Find window and continue with the query.



When we are back at the Advanced Find window and all of our criteria have been selected, we can then click on the “Results” button (red exclamation point) in the top left portion of the screen to view the results.

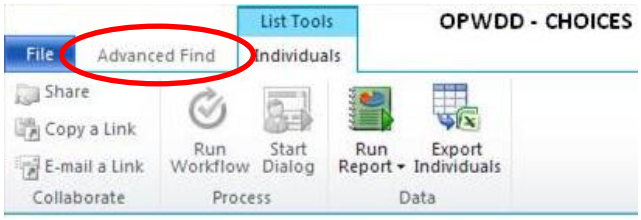


All records will display that match the criteria that we selected in our Advanced Find.



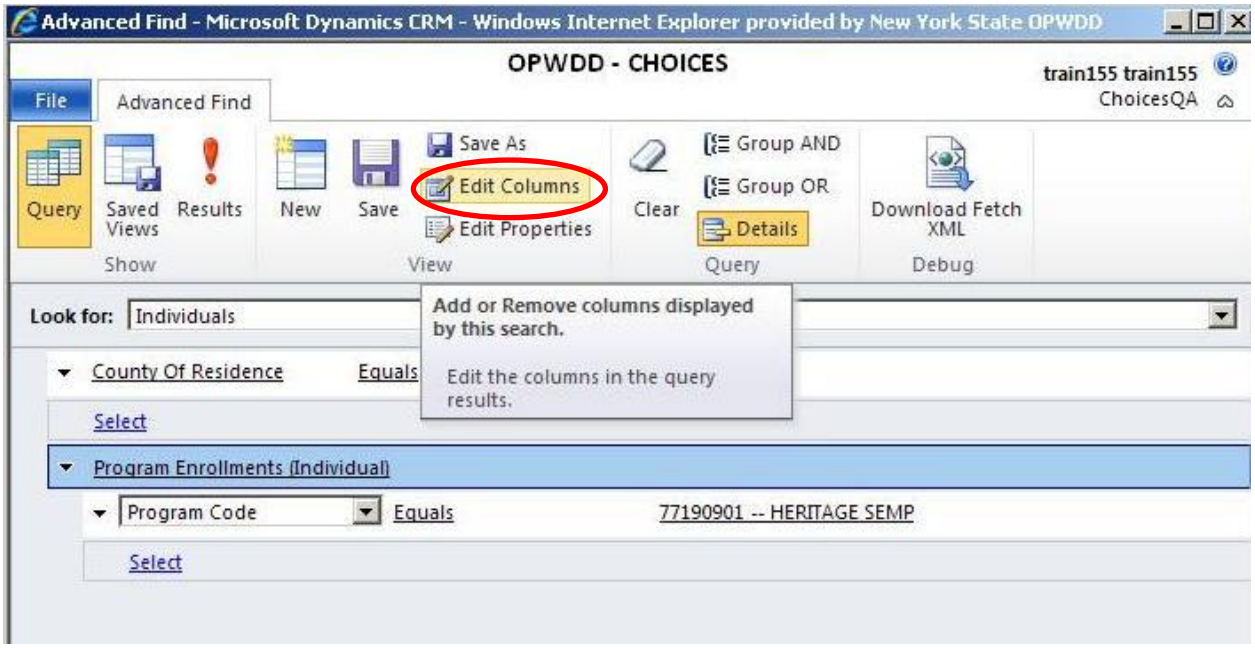
Advanced Find Tab

In order to edit the query, to save the query, or to begin a brand new query, simply click on the “Advanced Find” tab of the Advanced Find window.

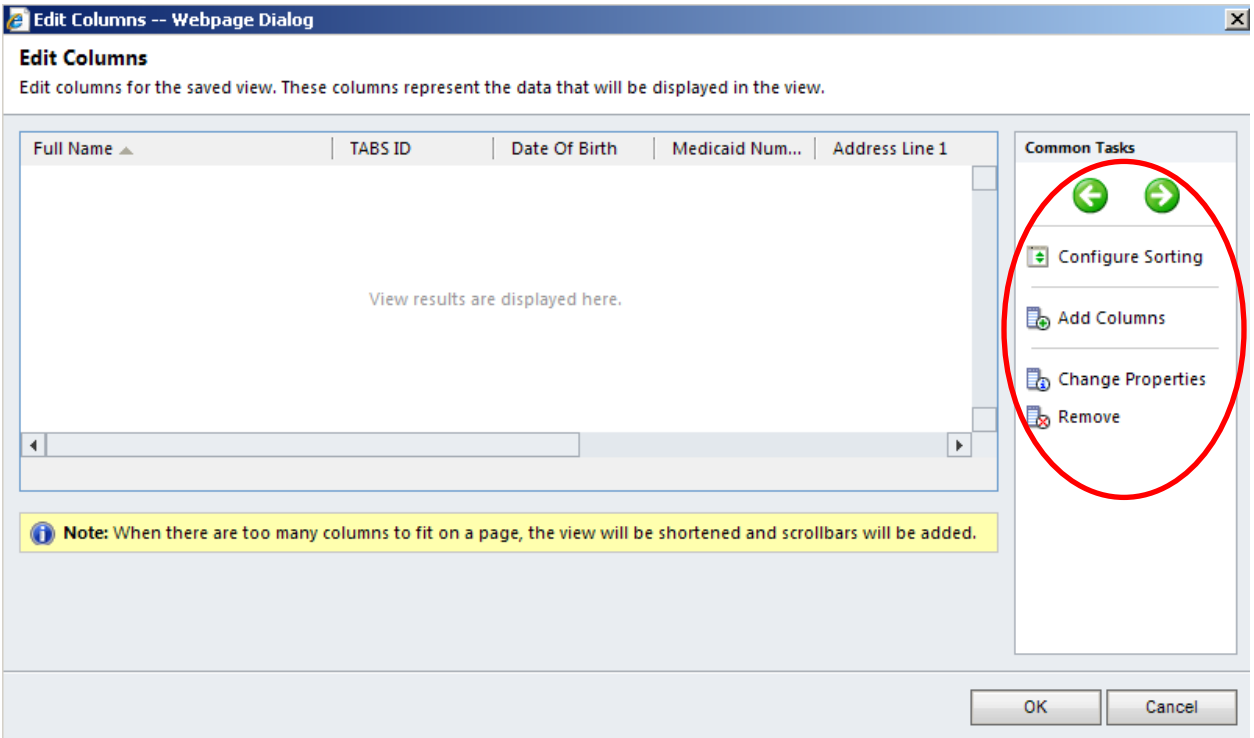


Editing Columns

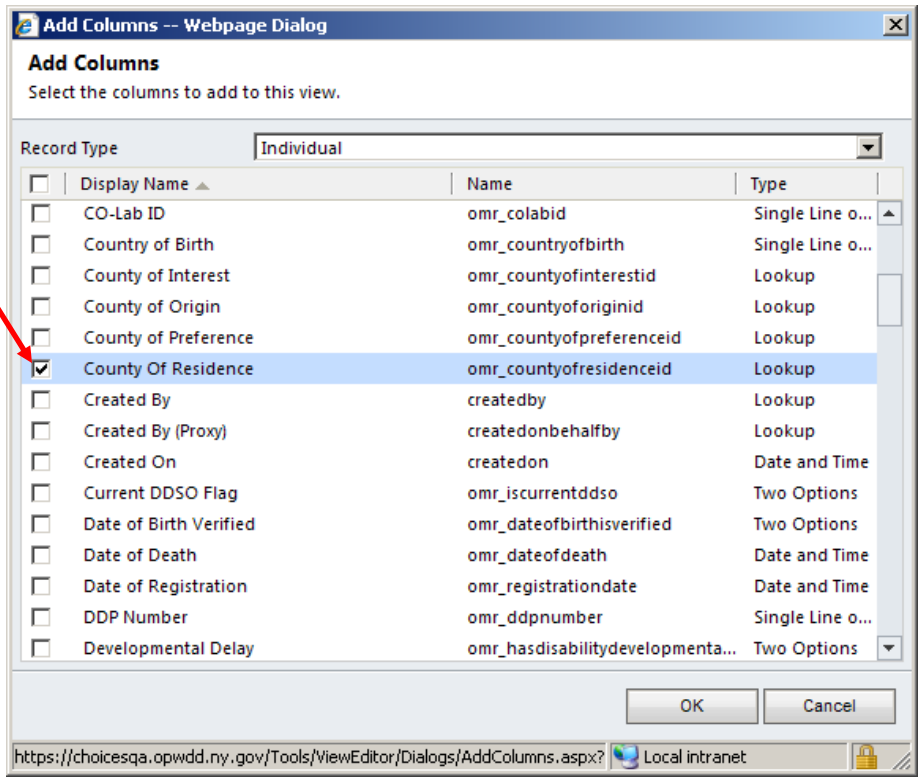
You can add or delete columns to your query in the Advanced Find window by clicking on the “Edit Columns” button.

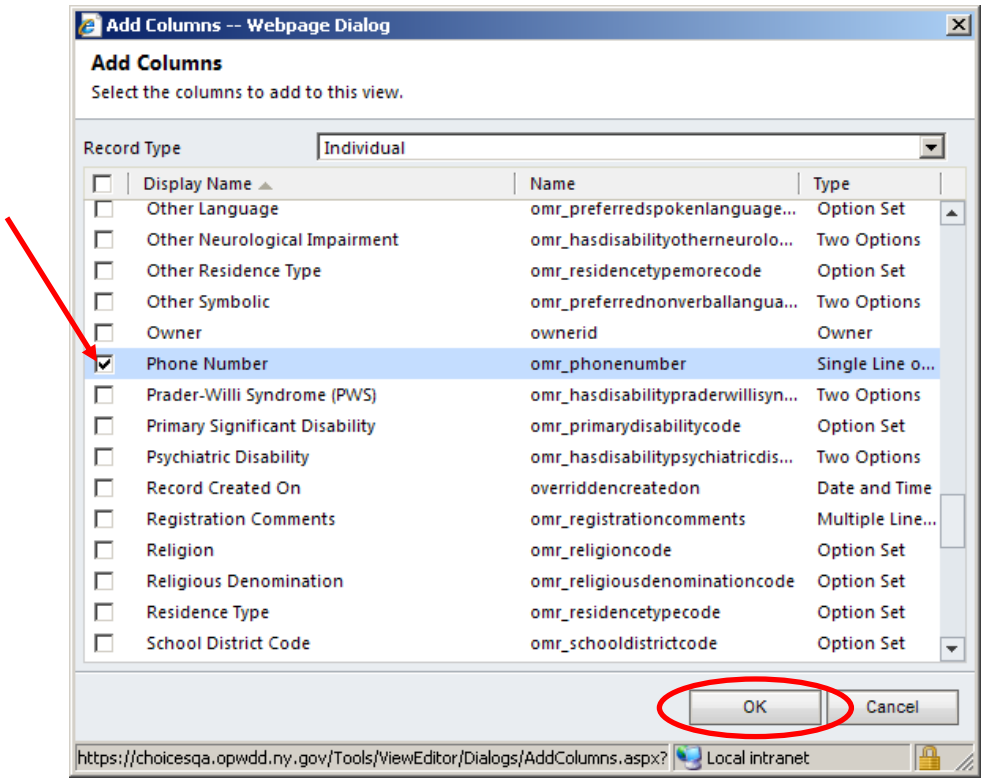


The Edit Columns dialog box will pop up with editing options that you can select in the right-hand column titled “Common Tasks”.

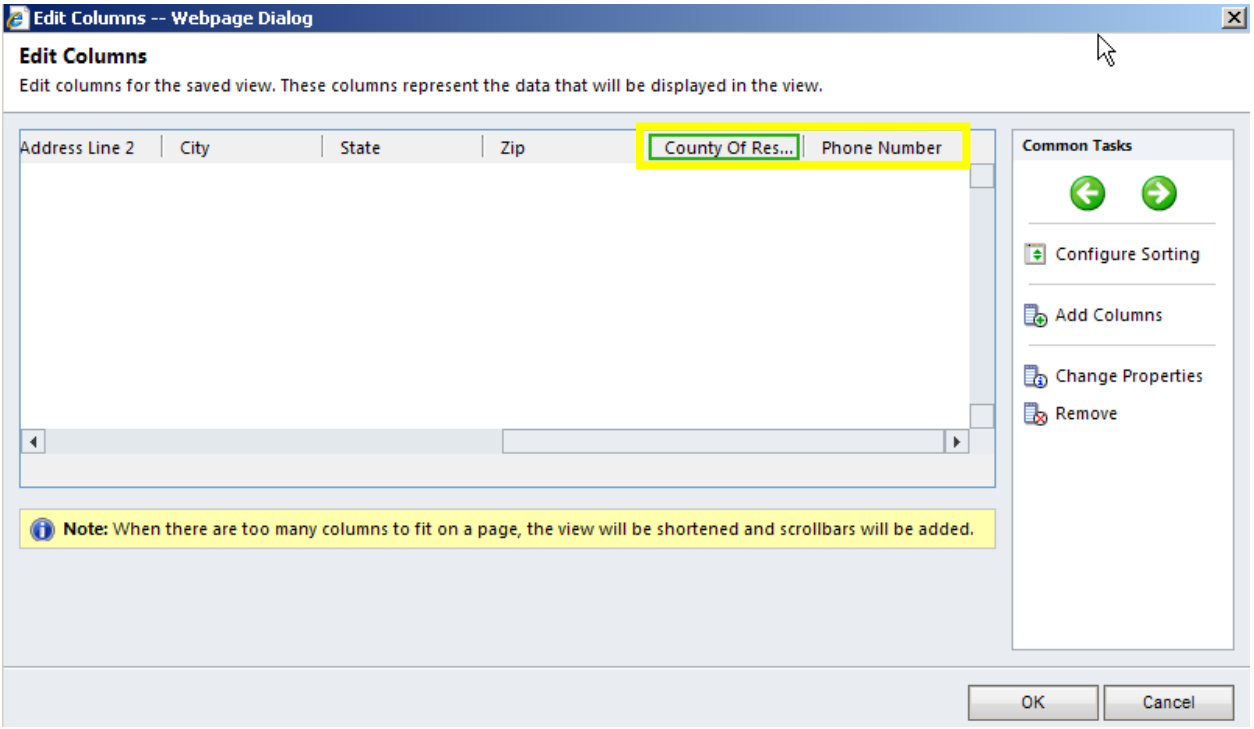


To add columns to the query, click on “Add Columns” in the right-hand column of the dialog box. An Add Columns dialog box will then pop up, allowing you to select one or more columns to add to your query. In this case, we’ll select the columns “County of Residence” and “Phone Number”. Click the “OK” button when you are done.



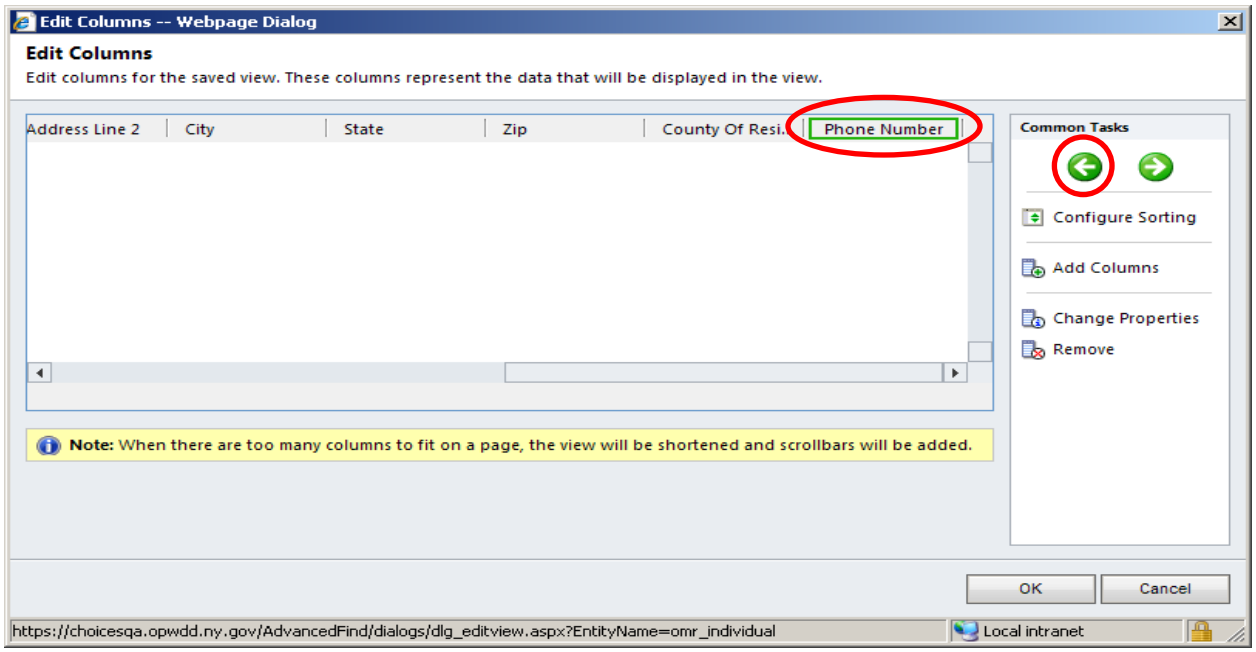


The columns we just selected will now appear in the list of columns for our query.

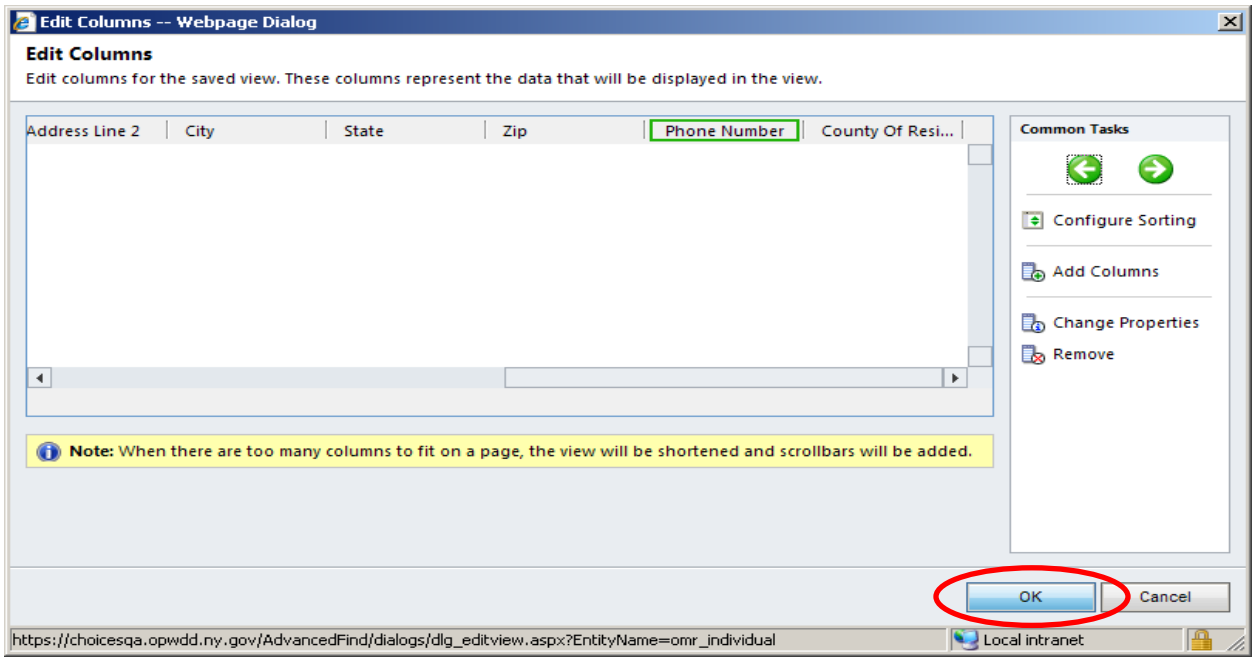


If you want to remove any column from the query, just click on that column name so it's highlighted in green and then click on "Remove" under Common Tasks.

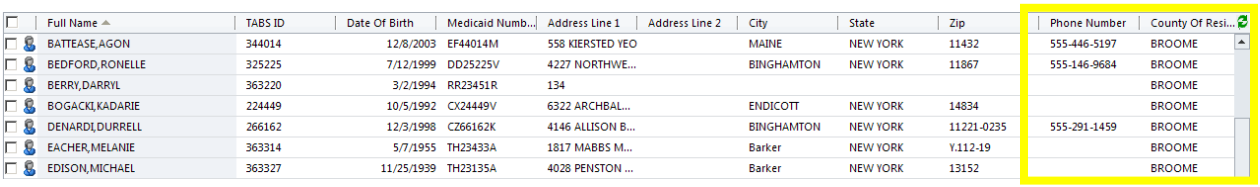
If you want to rearrange the columns in a different order, just click on a column name so it's highlighted in green and then click on either the green Left or Right Arrow button under Common Tasks to move that column accordingly. For example, we'll move the Phone Number column to the left, just after the Zip Code column.



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.



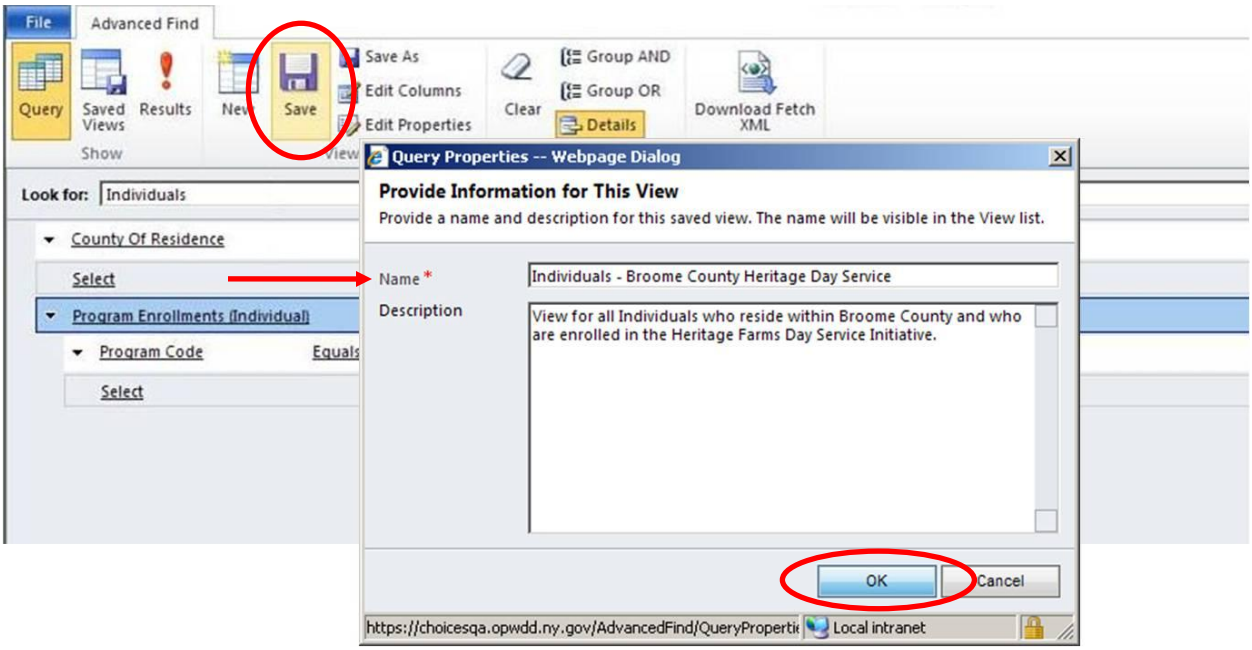
Now, when we click on the “Results” button in the Advanced Find window, we will see these new columns, in the order we selected, within the data set matching our criteria.



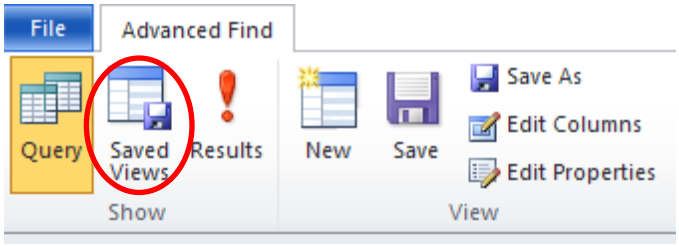
Full Name	TABS ID	Date Of Birth	Medicaid Numb...	Address Line 1	Address Line 2	City	State	Zip	Phone Number	County Of Resi...
BATTEASE,AGON	344014	12/8/2003	EF44014M	558 KIERSTED YEO		MAINE	NEW YORK	11432	555-446-5197	BROOME
BEDFORD,RONELLE	325225	7/12/1999	DD25225V	4227 NORTHWE...		BINGHAMTON	NEW YORK	11867	555-146-9684	BROOME
BERRY,DARRYL	363220	3/2/1994	RR23451R	134						BROOME
BOGACKI,KADARIE	224449	10/5/1992	CX24449V	6322 ARCHBAL...		ENDICOTT	NEW YORK	14834		BROOME
DENARDI,DURRELL	266162	12/3/1998	CZ66162K	4146 ALLISON B...		BINGHAMTON	NEW YORK	11221-0235	555-291-1459	BROOME
EACHER,MELANIE	363314	5/7/1955	TH23433A	1817 MABBS M...		Barker	NEW YORK	Y.112-19		BROOME
EDISON,MICHAEL	363327	11/25/1939	TH23135A	4028 PENSTON ...		Barker	NEW YORK	13152		BROOME

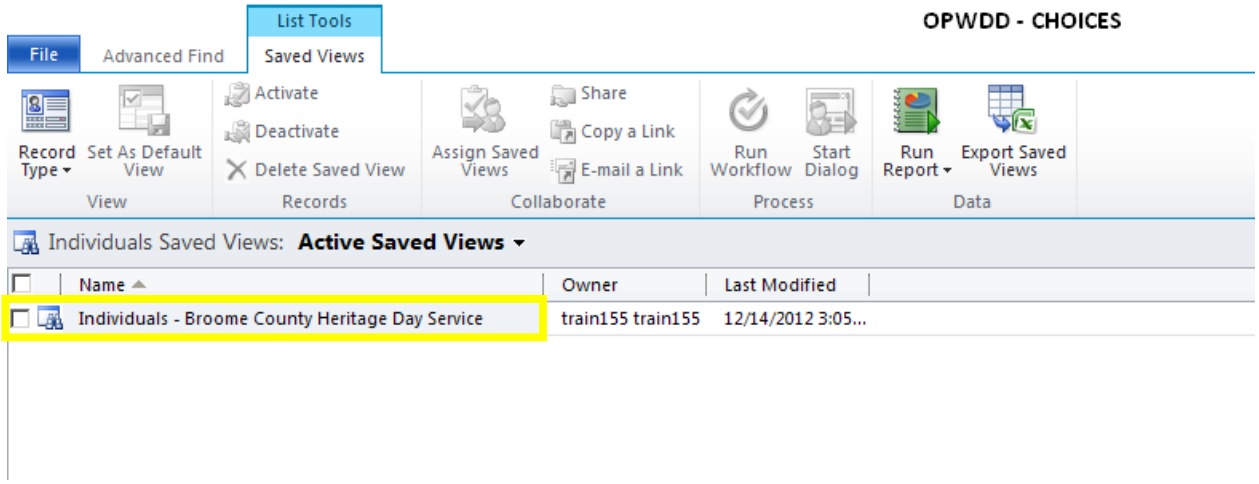
Saving as a View

If you’re satisfied with the results that your query produced, you can save it as a View for future use without having to recreate it again. In the “Advanced Find” tab of the Advanced Find window, click on the “Save” button. The Query Properties dialog box will pop up. You must enter a name for your View. You may also enter a brief description if you like. Click the “OK” button when you are ready to save the query as a View for future use.



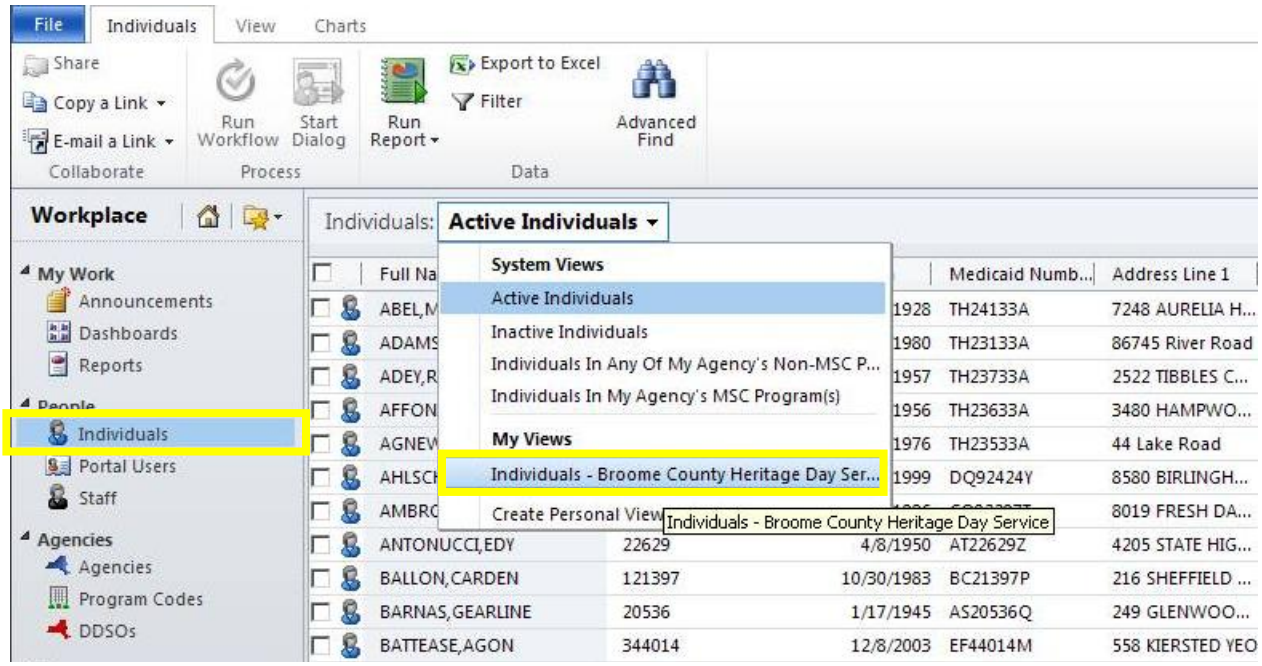
To access the View we just saved, or any other previously Saved Views <u>within that Record Type</u> (e.g. Individuals), click on the “Saved Views” button in the “Advanced Find” tab of the Advanced Find window.





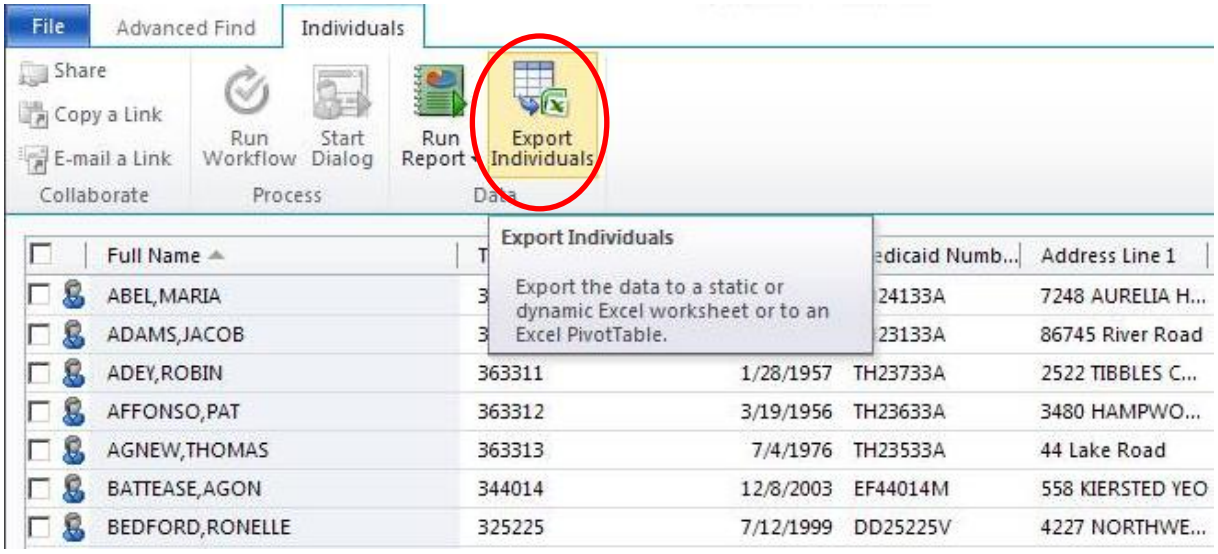
Note: To see <u>all</u> Saved Views in <u>all</u> Record Types, click on the “Record Type” button in the upper left corner of the Saved View tab and select “All”.

You may also access a Saved View in the CHOICES screen using the drop down list under “My Views” for that particular Record Type (e.g. Individuals). We can select this View to display all records that match our criteria at any given time. The data set will update automatically as relevant records become active or inactive within CHOICES.

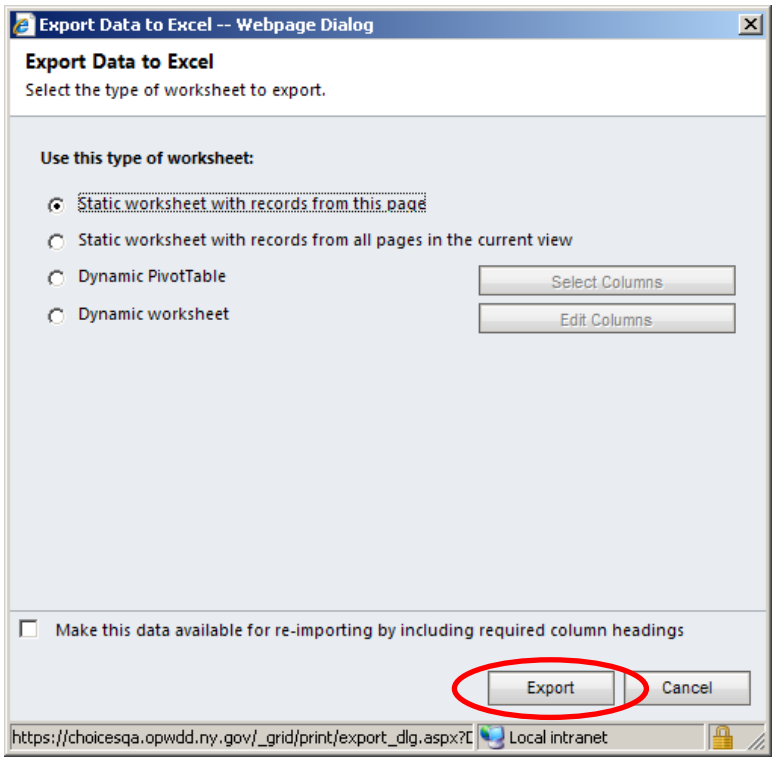


Exporting to Excel

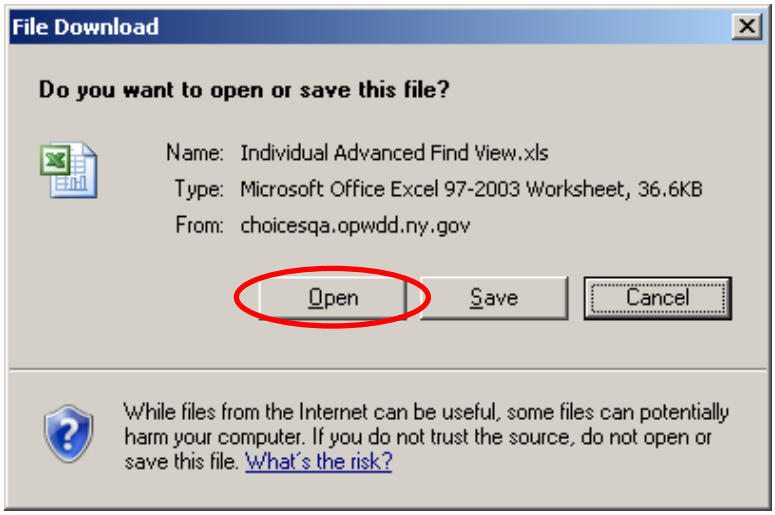
When you run a query in the Advanced Find window and get the desired results, you have the option of exporting the current data set to a Microsoft Excel spreadsheet. To perform this function, click on the “Export” button. In this case, we’re going to export the data set from our Saved View of “Individuals - Broome County Heritage Day Service”.



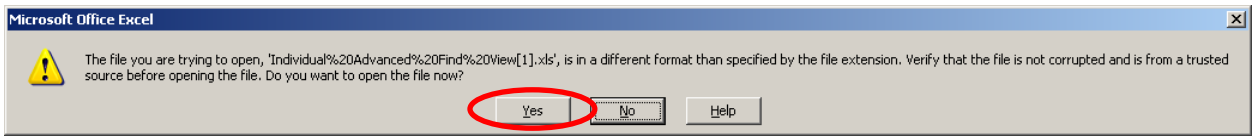
An Export Data dialog box will pop up with options to export your data set. The default option will be “Static worksheet with records from this page”. If your data set is only one page (up to 50 rows), leave the default as is and click the “Export” button. If your data set is more than one page, select the option “Static worksheet with records from all pages in the current view” and click the “Export” button. In this case, we only have one page of data, so we’ll leave the default.



You will then be prompted to Open or Save the file to a spreadsheet. Click the “Open” button to view the results.



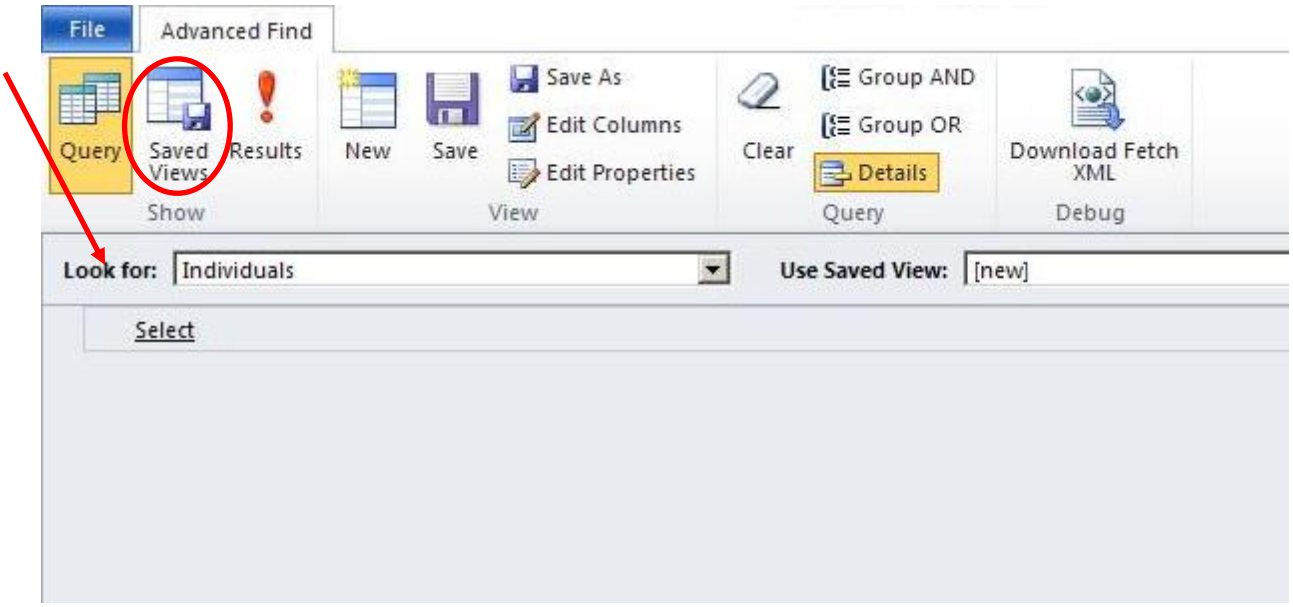
Depending on your version of Microsoft Excel, you may see a pop-up message informing you that the file is in a different format than specified by the file extension. If you get this message, click the “Yes” button to proceed and open the spreadsheet. You can then save the spreadsheet to your PC.



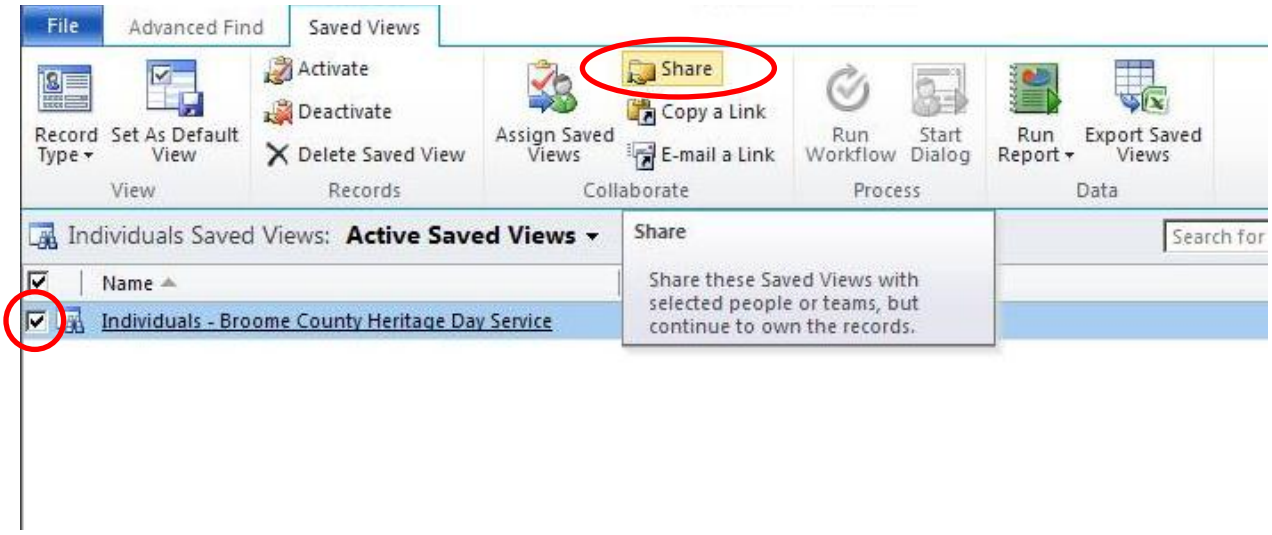
	A	B	C	D	E	F	G	H	I	J	K
1	Full Name	TABS ID	Date Of Birth	Medicaid Numb	Address Line 1	Address Line 2	City	State	Zip	Phone Number	County Of R
2	ABEL,MARIA	363310	1/19/1928	TH24133A	7248 AURELIA HILLAVE		Barker	NEW YORK	06810		BROOME
3	ADAMS,JACOB	363309	7/8/1980	TH23133A	86745 River Road		Barker	NEW YORK	32903		BROOME
4	ADEY,ROBIN	363311	1/28/1957	TH23733A	2522 TIBBLES CROSSING		Barker	NEW YORK	12475		BROOME
5	AFFONSO,PAT	363312	3/19/1956	TH23633A	3480 HAMPWORTH BOY		Barker	NEW YORK	07030		BROOME
6	AGNEW,THOMAS	363313	7/4/1976	TH23533A	44 Lake Road		Barker	NEW YORK	13744		BROOME
7	BATTEASE,AGON	344014	12/8/2003	EF44014M	558 KIERSTED YEO		MAINE	NEW YORK	11432	555-446-5197	BROOME
8	BEDFORD,RONELLE	325225	7/12/1999	DD25225V	4227 NORTHWELWOOD FOUZIA		BINGHAMTON	NEW YORK	11867	555-146-9684	BROOME
9	BERRY,DARRYL	363220	3/2/1994	RR23451R	134						BROOME
10	BOGACKI,KADARIE	224449	10/5/1992	CX24449V	6322 ARCHBALD WALSH		ENDICOTT	NEW YORK	14834		BROOME
11	DENARDI,DURRELL	266162	12/3/1998	CZ66162K	4146 ALLISON BOELSEN		BINGHAMTON	NEW YORK	11221-0235	555-291-1459	BROOME
12	EACHER,MELANIE	363314	5/7/1955	TH23433A	1817 MABBS MCAVOY		Barker	NEW YORK	Y.112-19		BROOME
13	EDISON,MICHAEL	363327	11/25/1939	TH23135A	4028 PENSTON REGENCY		Barker	NEW YORK	13152		BROOME
14	GRAFTON,MARCIA	363227	6/3/1978								BROOME
15	HANKS,KEVIN	363329	2/12/1945	TH23175A	3842 FOSDICK CRECENDOE		Barker	NEW YORK	14057		BROOME
16	HEARD,NANCY	363325	2/14/1949	TH23137A	2341 DURLAND VILLIAGE		Barker	NEW YORK	10573-1611		BROOME
17	HEBER,CHRISTINE	363321	3/11/1990	TH23153A	9996 REBER MIDLAR		Barker	NEW YORK	12912		BROOME
18	HEINS,TERRY	363322	4/12/1969	TH23143A	5050 CLOSTER VANDERKARR		Barker	NEW YORK	14847		BROOME
19	HENRY,MARY	363323	8/23/1984	TH23139A	4297 NATHLEEN STINSON		Barker	NEW YORK	14897		BROOME
20	HILLMAN,MARCIA	363320	10/11/1973	TH23163A	5334 STAFFORDS BOWLES		Barker	NEW YORK	08859		BROOME
21	HUGHES,LAURA	363326	1/12/1940	TH23136A	6067 JUDY FONTAINE		Barker	NEW YORK	18816		BROOME
22	KRISTIAN,JACKIE	363324	3/3/1929	TH23138A	6563 PENNWOOD DORADO		Barker	NEW YORK	13698		BROOME
23	KRISTIAN,SUE	363318	2/27/1945	TH23183A	7988 SWEETWATER WINDWOO		Barker	NEW YORK	16748		BROOME
24	SADLER,MARK	363317	10/7/1949	TH23195A	1959 JEFWIN BEBERNITZ		Barker	NEW YORK	13120		BROOME
25	SAGER,CAROL	363316	1/7/1974	TH23123A	8311 MUDDY HAMTON		Barker	NEW YORK	12430		BROOME
26	SAWER,RICHARD	363330	1/24/1949	TH23134A	5028 WINTREBURY ALBRO		Barker	NEW YORK	10952-2328		BROOME

Sharing a Saved View

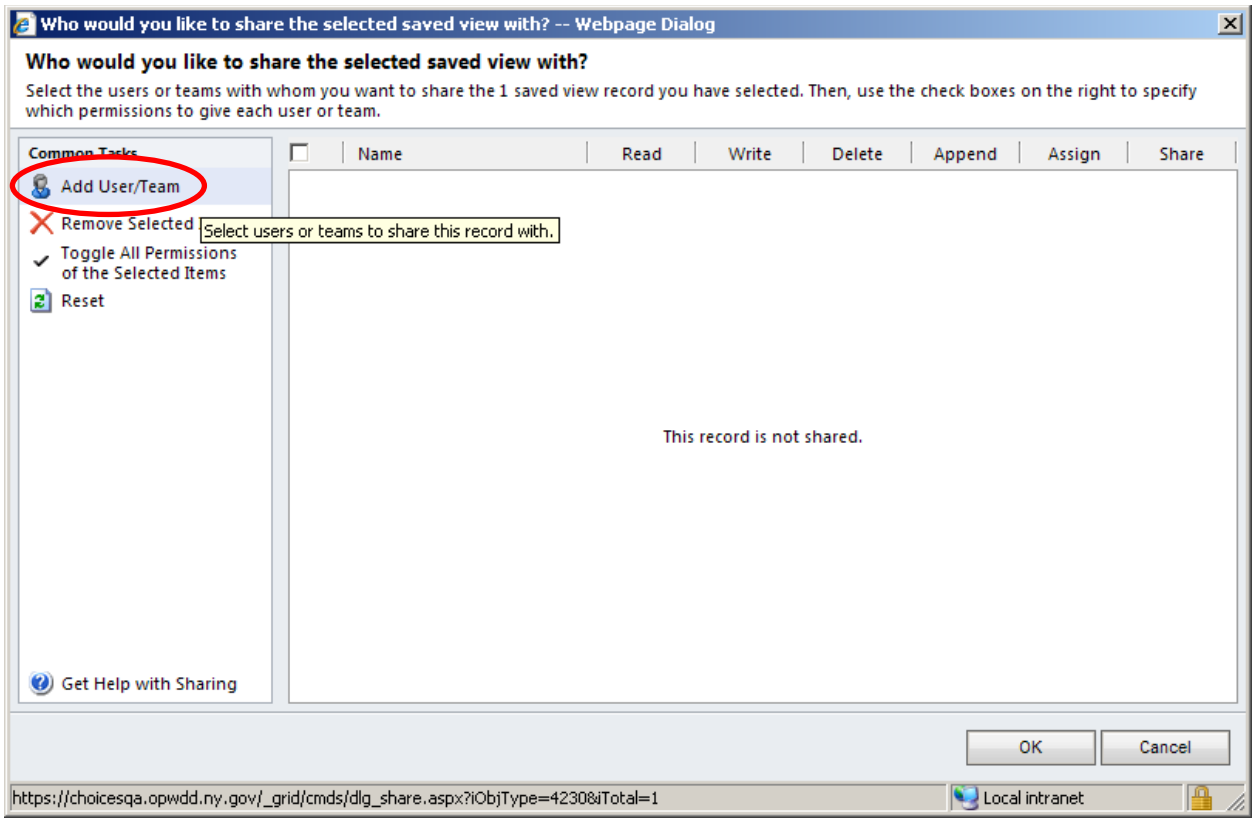
If there’s a need to share a Saved View with another CHOICES User, you may do so in the Advanced Find window. In the “Advanced Find” tab, make sure the appropriate Record Type is selected in the “Look for” drop down. In this case, we’ll select Individuals since that is what our Saved View is based on. Then click on the “Saved View” button.



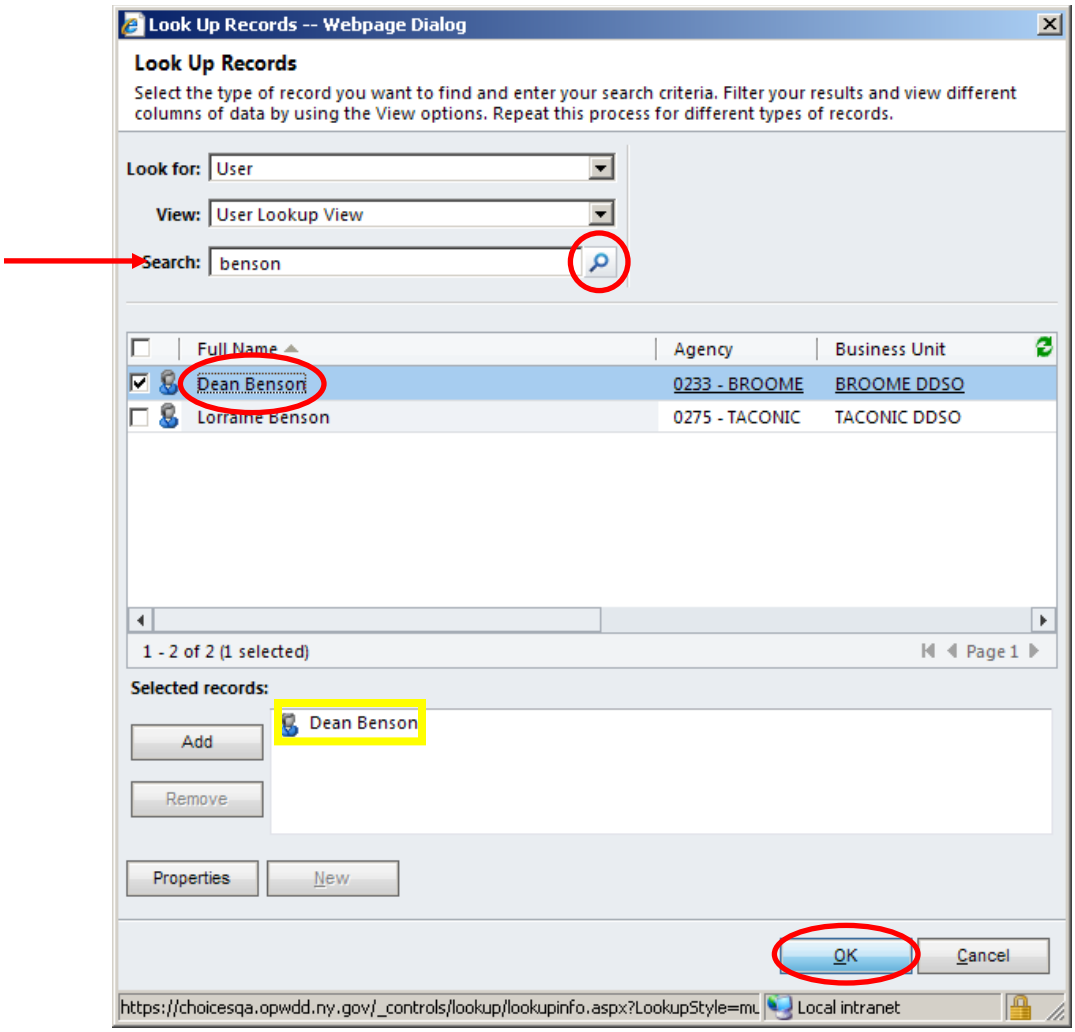
When the Saved Views are listed, select the one you wish to share by checking the checkbox. Then click the small “Share” icon at the top center of the Advanced Find window.



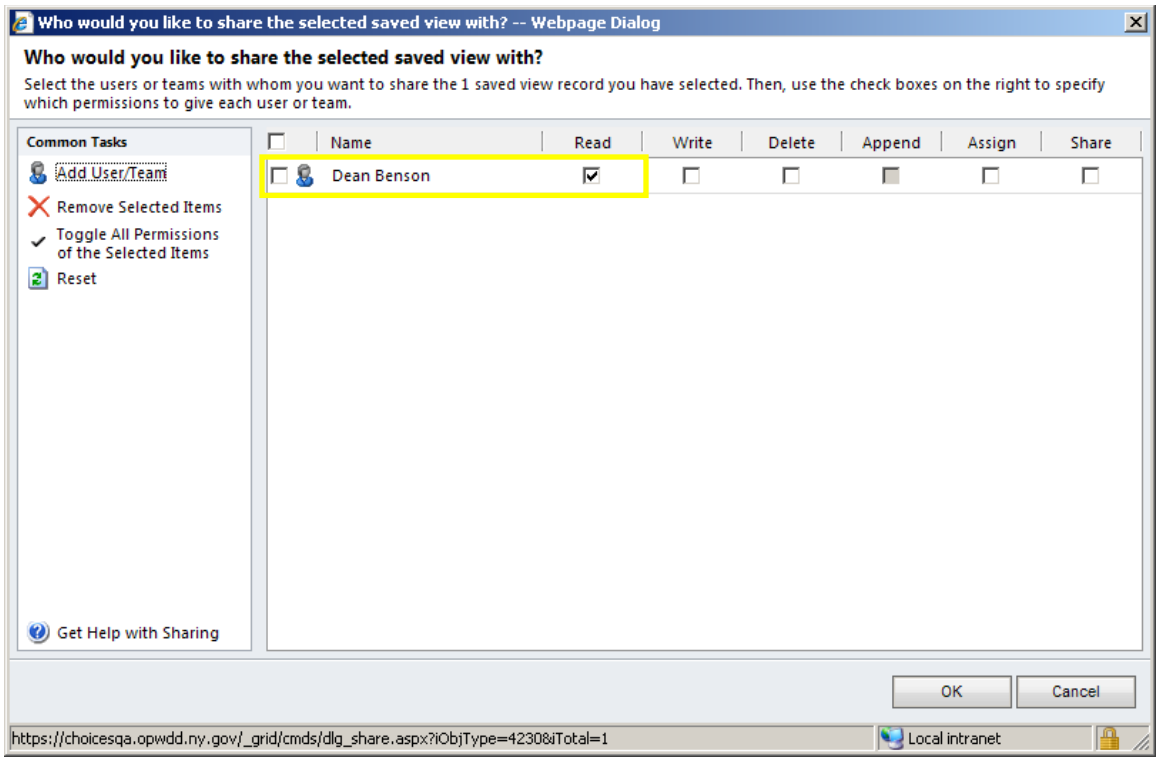
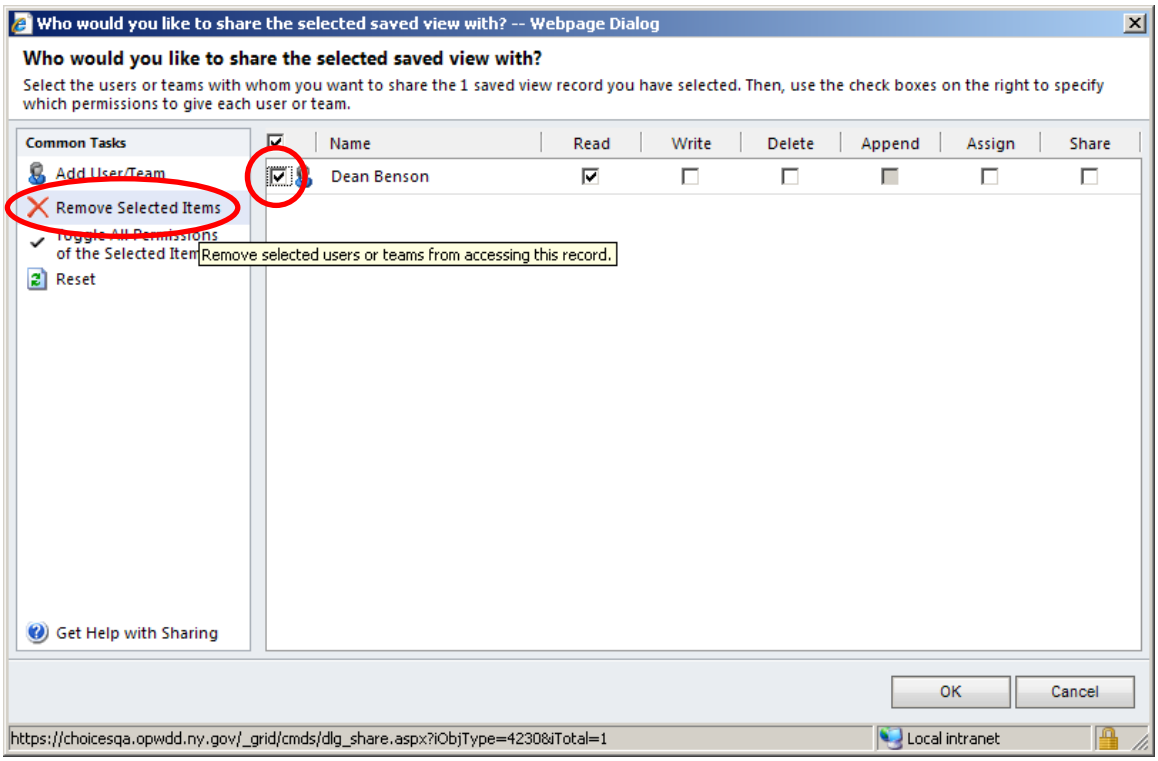
A Sharing dialog box will pop up with functions in the left-hand column titled “Common Tasks”. Click on “Add User/Team” in order to share the Saved View, and then a Look Up Records dialog box will appear allowing you to search for and select a User.



Type the first or last name of the User in the “Search” field of the Look Up Records dialog box, and then click the Search icon. In this case, we will share our Saved View with a user named Dean Benson. When you see the full name displayed, click on the name (which is a link) to add it to the “Selected records”. Then click the “OK” button.



You will then get confirmation in the Sharing dialog box that the User you selected now has “Read” access, enabling them to see the Saved View for that Record Type when they log into CHOICES. You may also give that User rights to modify the Saved View if need be by checking the “Write” checkbox.



If there is a need to remove the User from having any access to the Saved View, you would simply select that User's name in the Sharing dialog box by checking the checkbox next to their name, and then click "Remove Selected Items" in the left-hand column.