



Office for People With Developmental Disabilities

Advanced Find User Guide

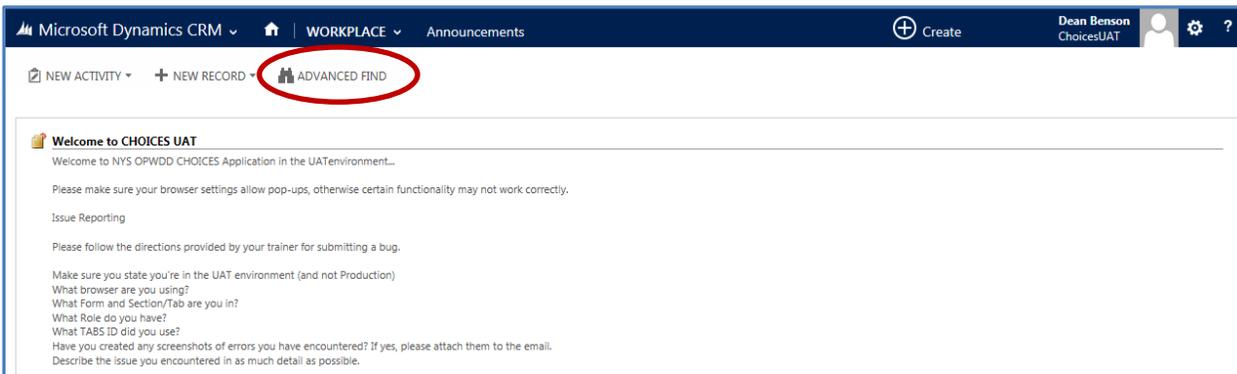
Using Advanced Find in CHOICES

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

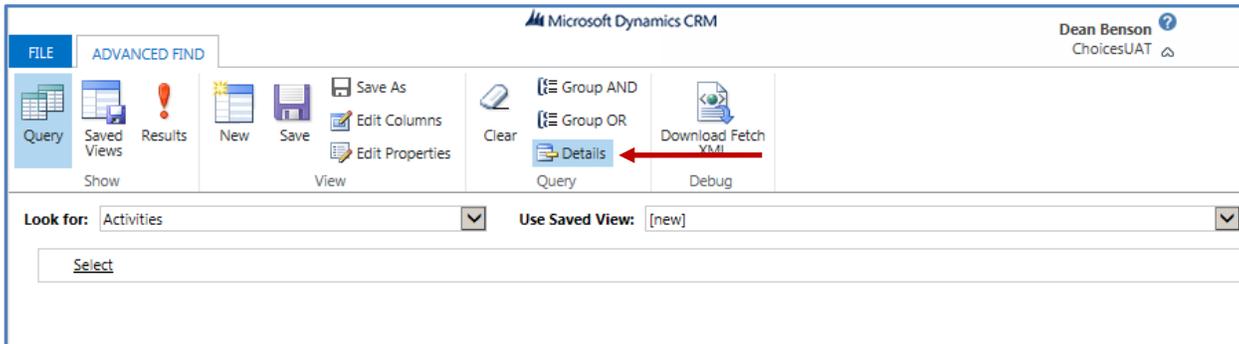
Advanced Find is a reporting tool in CHOICES that allows the user to extract specific data. It uses a query in which you define the criteria to filter the data and provide specific data set results. The user creates a query to prepare data for export. Please keep in mind that users can only create queries with the information that they have access to based on their role in CHOICES.

Creating A Query

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

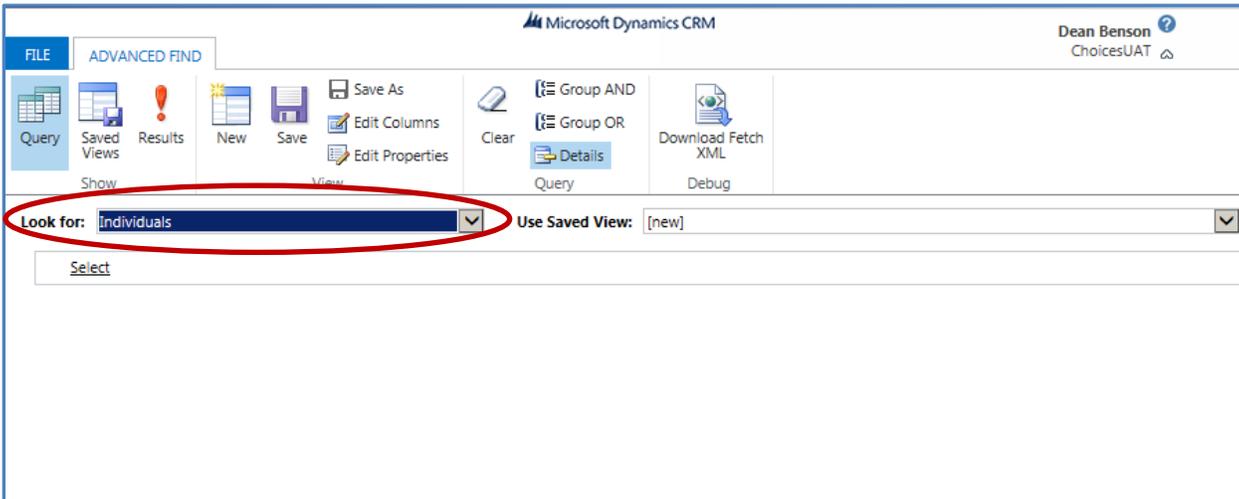


The Advanced Find pop-up window appears. Make sure the “Details” icon is highlighted (if not then click on it); this will allow you to select the criteria you need.

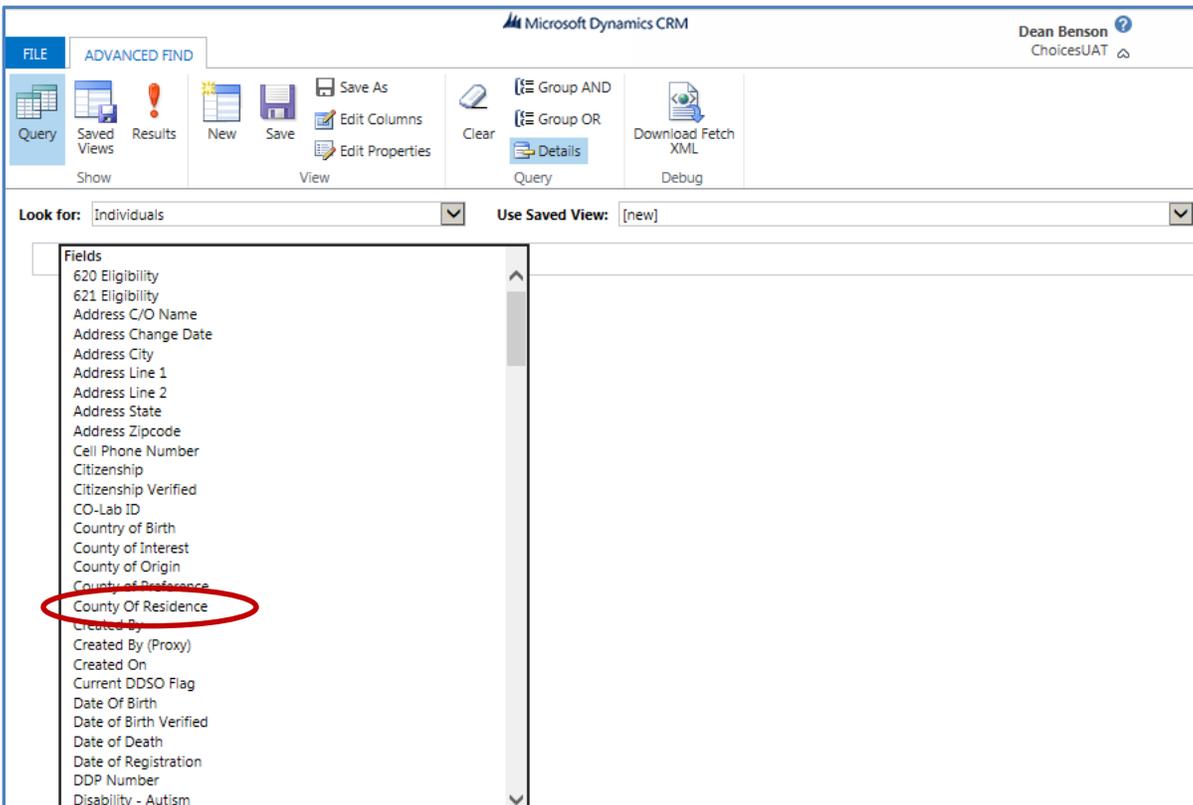


The fields you select will depend on what Record Type you’re working with. In the following example, you’ll create a query to view records of **Individuals** who reside in a certain **County** and who are enrolled in a certain **Program Code**.

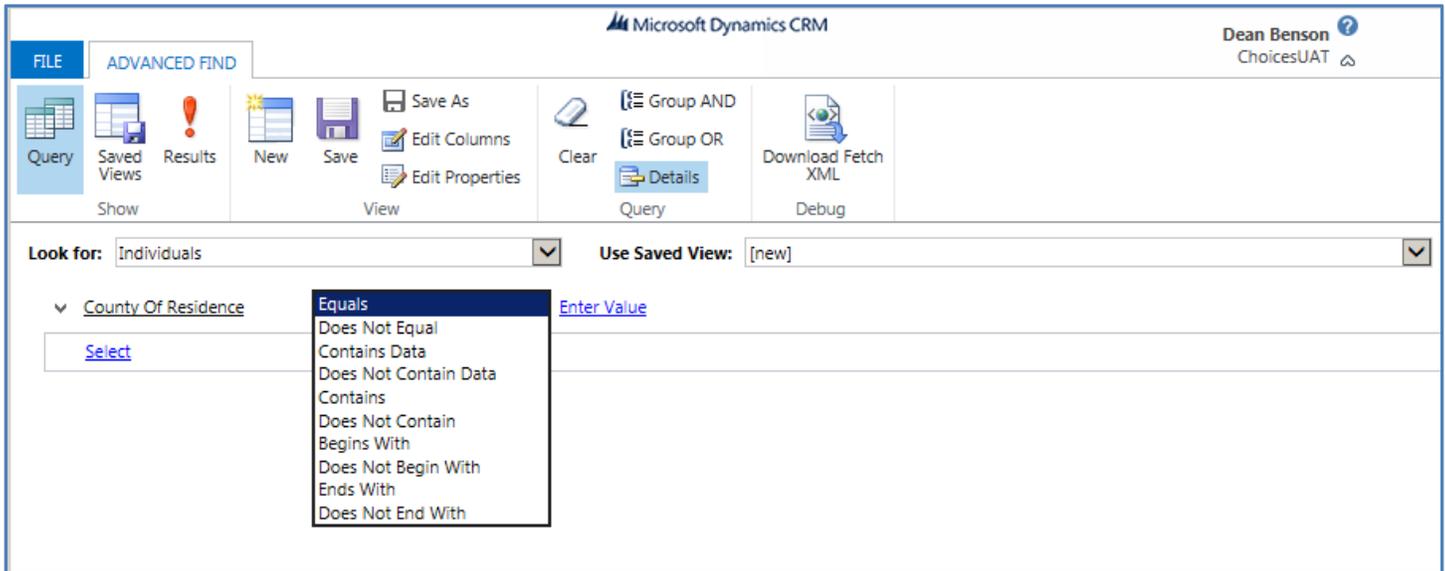
1. To start the query, select the Record Type you want to work with from the “Look for” drop down list. In this example, you will choose “Individuals” from the drop-down list. The Record Type limits the criteria and fields that can be returned on the query.



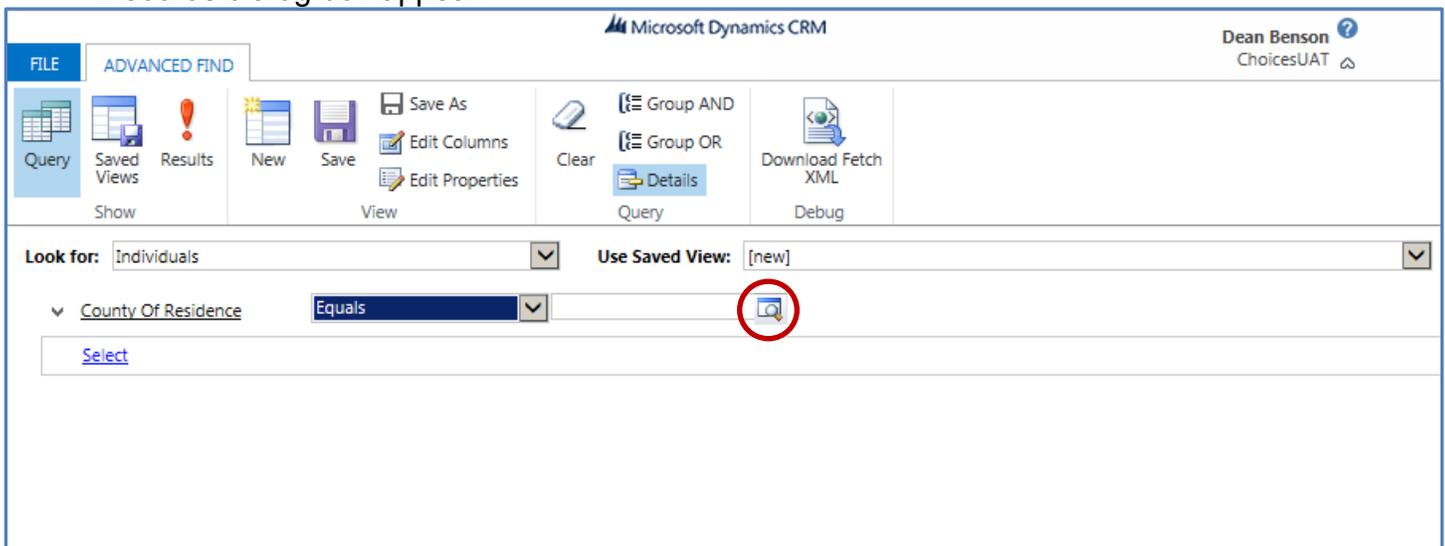
2. Select the criteria for the fields. From the drop-down list, you will select the “County of Residence” field first.



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, you will keep the default of “Equals”.

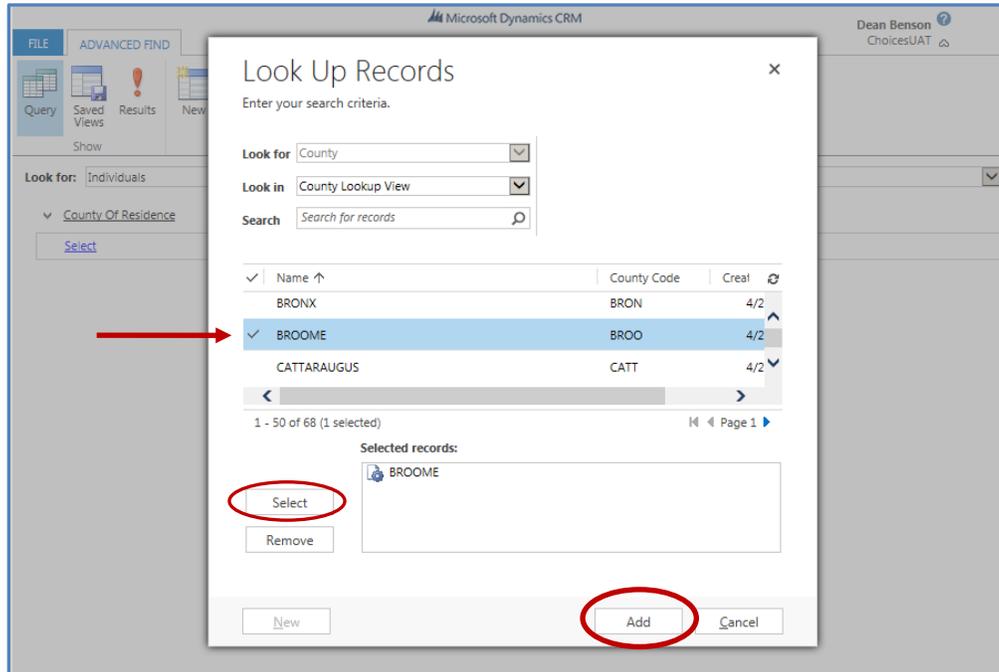


4. Next enter a value for the criteria that you selected. In order to enter a value, you may type the name in the empty value field where it reads “Enter Value”, just be sure to spell it correctly or the query will not yield any results. You can also click on the Search icon to bring up a Look Up Records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

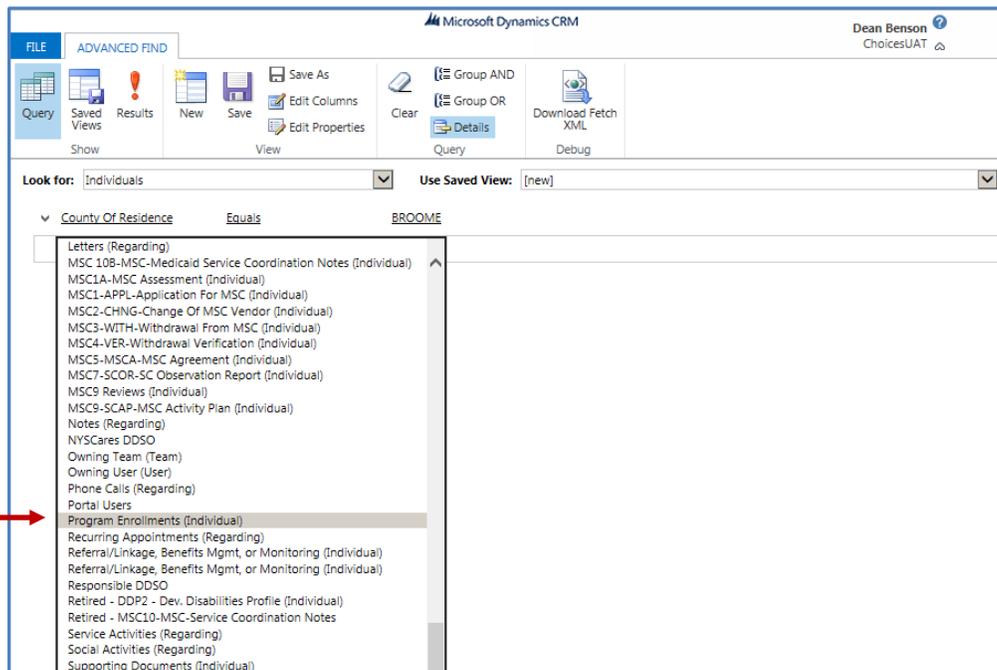


In the Look Up Records dialog box, search for the particular County by scrolling through the list, and then click on the appropriate selection. "Broome" is selected for the example.

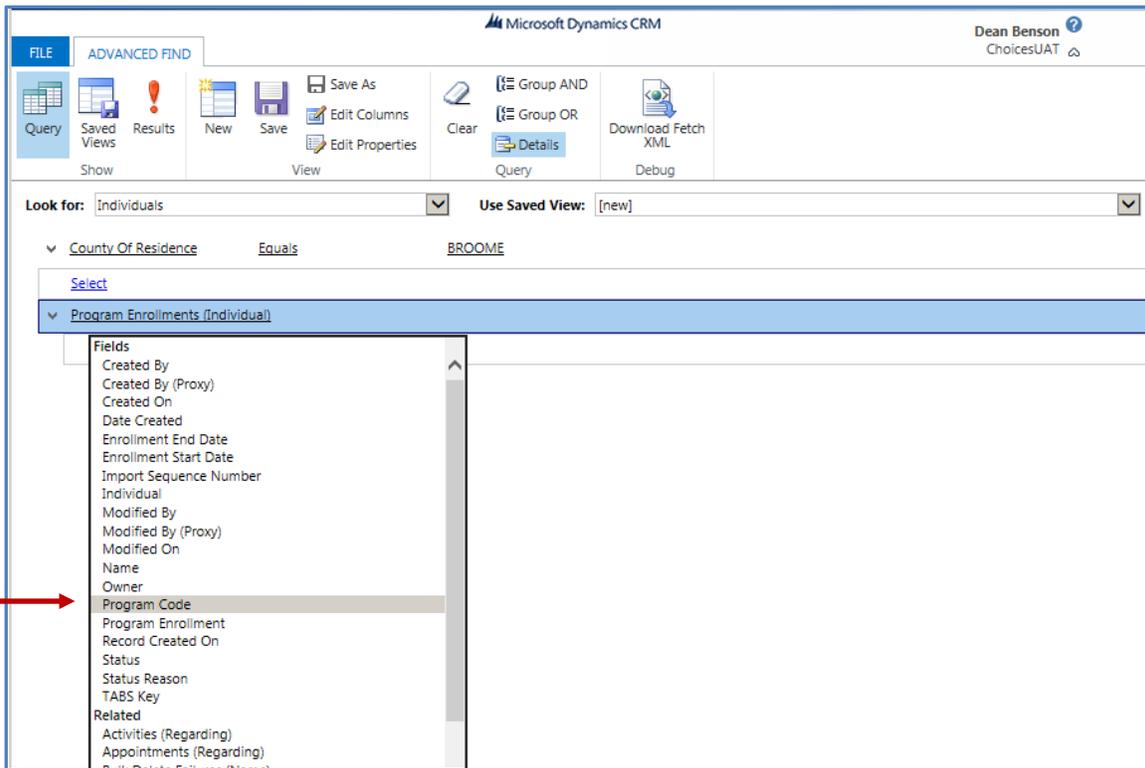
Click on the checkbox to highlight the appropriate County and then click the "Select" button to add the value to your selection. Once all sections have been made, click the "Add" button to go back to the Advanced Find window and continue with the query.



5. Repeat the previous four steps to select other criteria to further define the query. For the example, you will also select "Program Enrollments" as a value.

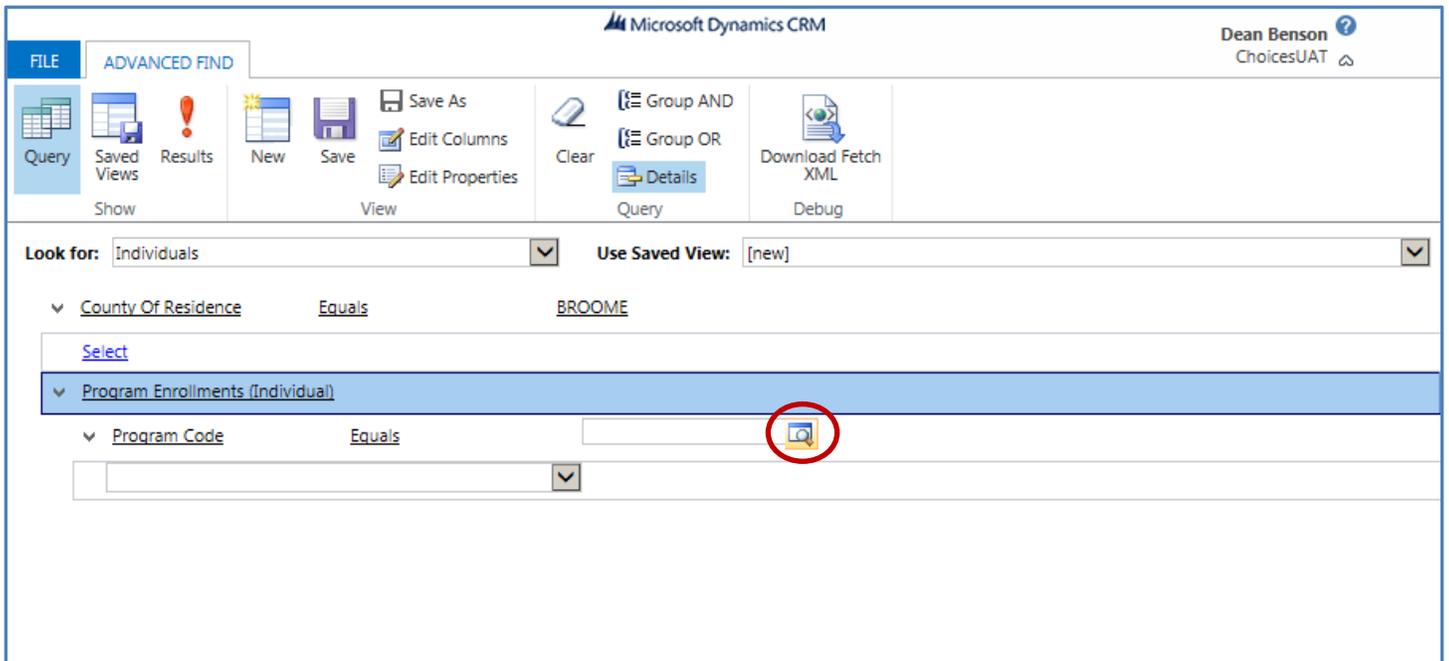


To further narrow the results, in the drop-down list below “Program Enrollment (Individual)”, you will select the field “Program Code.”



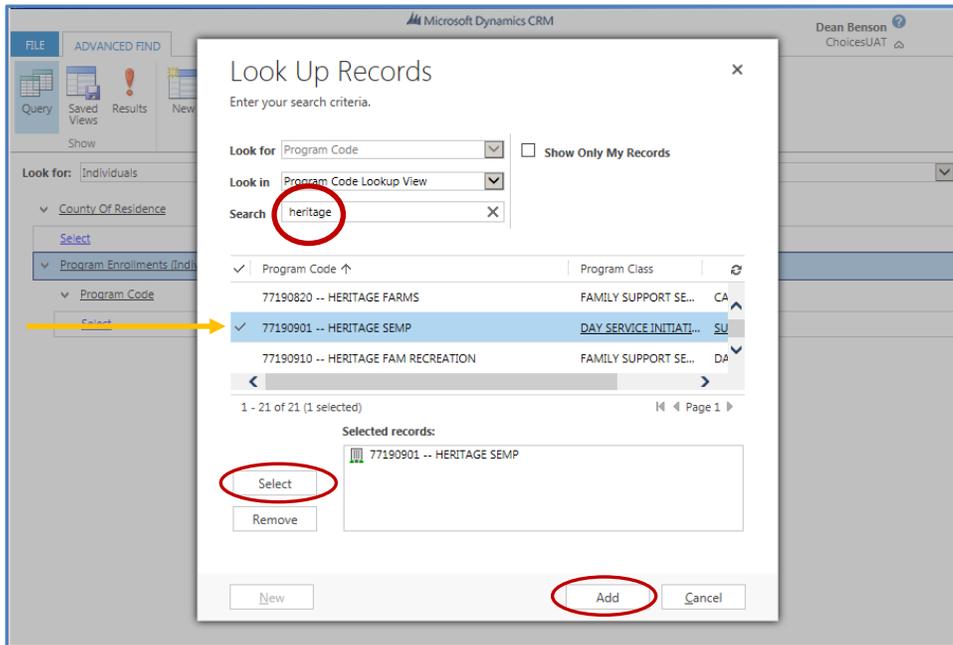
You will keep the default formula of “Equals”.

As stated before, to enter a value, you may type the name in the empty value field where it reads “Enter Value”, or you can click on the Search icon to bring up a Look Up Records dialog box for all available values.

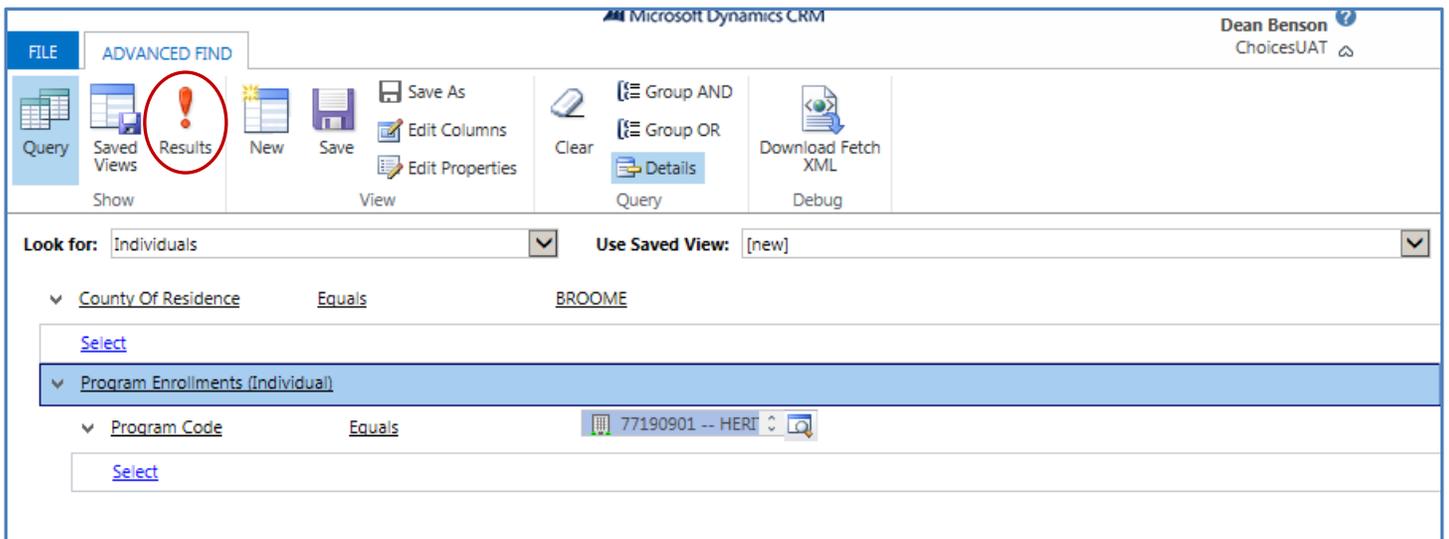


In the Look Up Records dialog box, search for the Program Code by typing part of the program name in the Search field. In this case, you will select “77190901 - Heritage SEMP.”

Click on the checkbox to highlight the appropriate 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 you are back at the Advanced Find window and 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 will display that match the criteria selected in Advanced Find.

Microsoft Dynamics CRM

Dean Benson
ChoicesUAT

FILE ADVANCED FIND LIST TOOLS INDIVIDUALS

Share Copy a Link Email a Link Collaborate

FAQ

Run Workflow Start Dialog

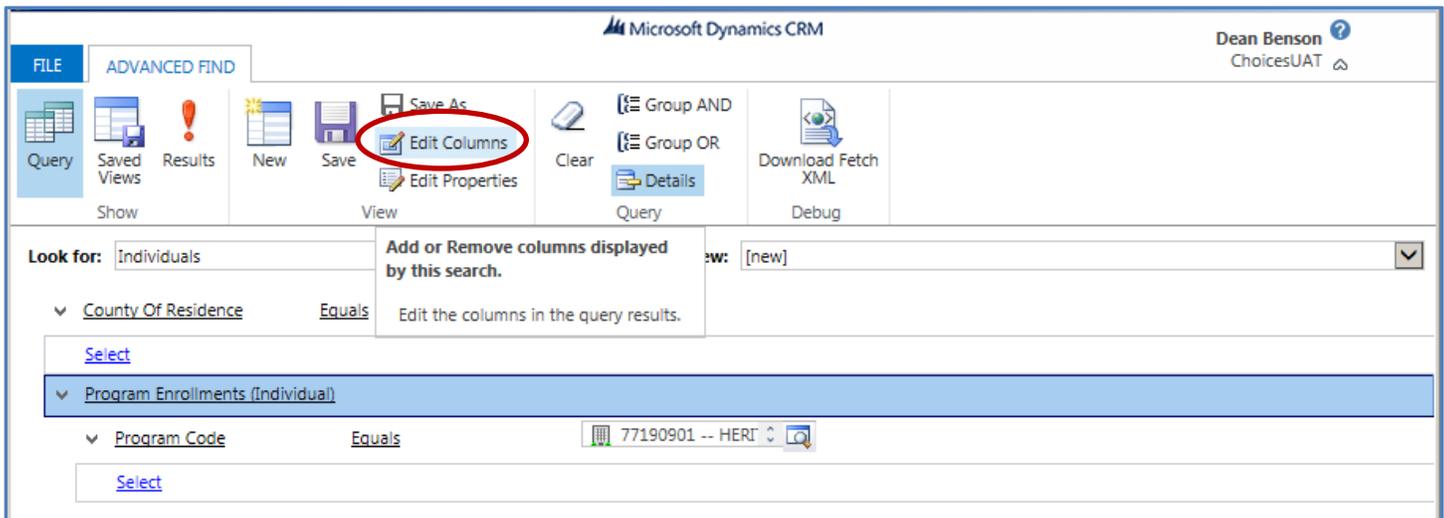
Run Report Export Individuals

Process Data

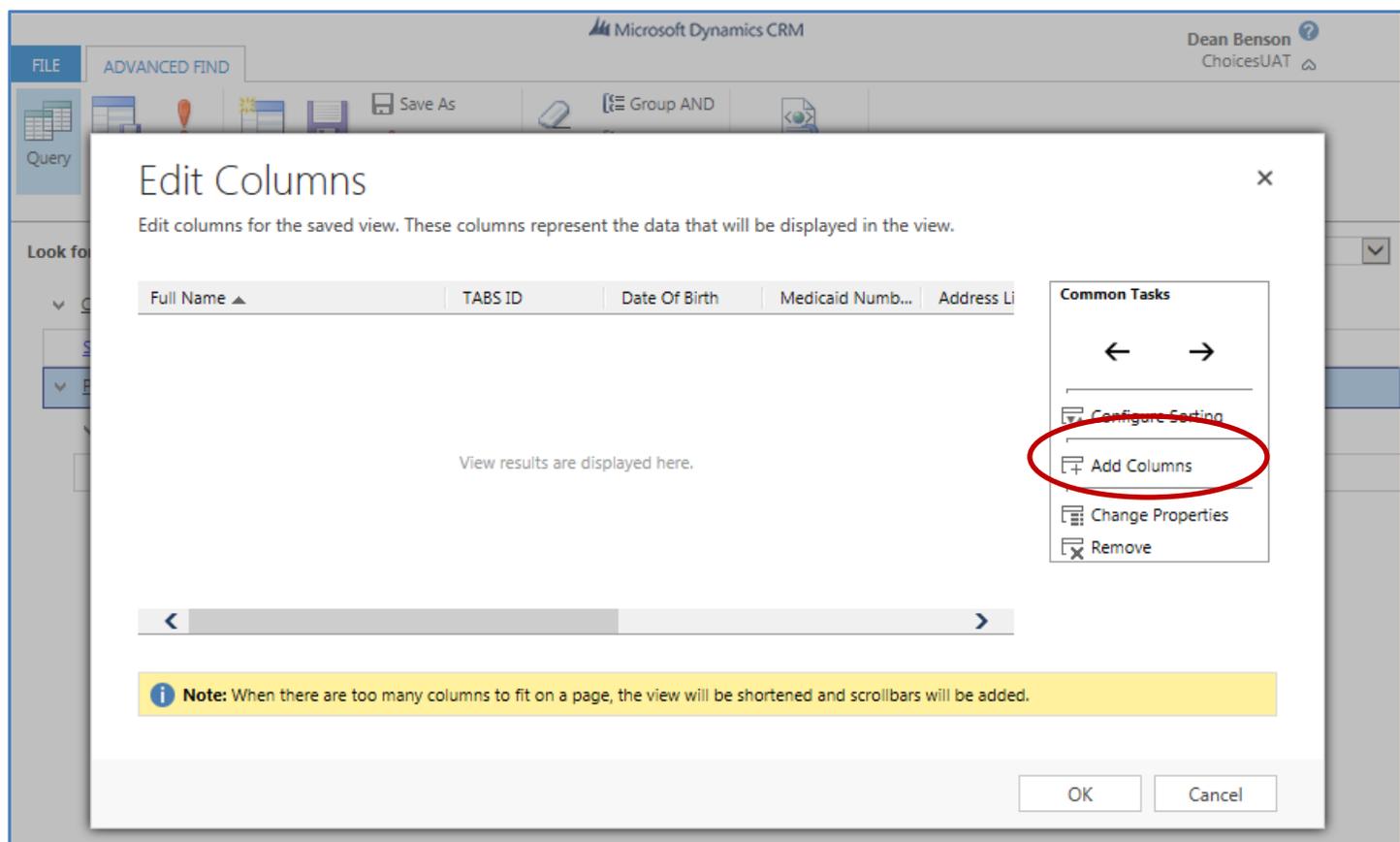
Full Name ↑	TABS ID	Date Of Birth	Medicaid Numb...	Address Line 1	Address Line 2	Address City	A	↻
ADAMS,JACOB	363309	7/8/1980	TH23133A	86745 River Road		Barker	NEW	↑
ADEY,ROBIN	363311	1/28/1957	TH23733A	2522 TIBBLES C...		Barker	NEW	
AFFONSO,PAT	363312	3/19/1956	TH23633A	3480 HAMPWO...		Barker	NEW	
AGNEW,THOMAS	363313	3/13/1975	TH23533A	44 Lake Road		Barker	NEW	
BATTEASE,AGON	344014	12/8/2003	EF44014M	558 KIERSTED Y...		MAINE	NEW	
BEDFORD,RONELLE	325225	7/12/1999	DD25225V	4227 NORTHWE...		BINGHAMTON	NEW	
BERRY,DARRYL	363220	3/2/1994	RR23451R	134 Main St		Broomeville	NEW	

Editing Columns

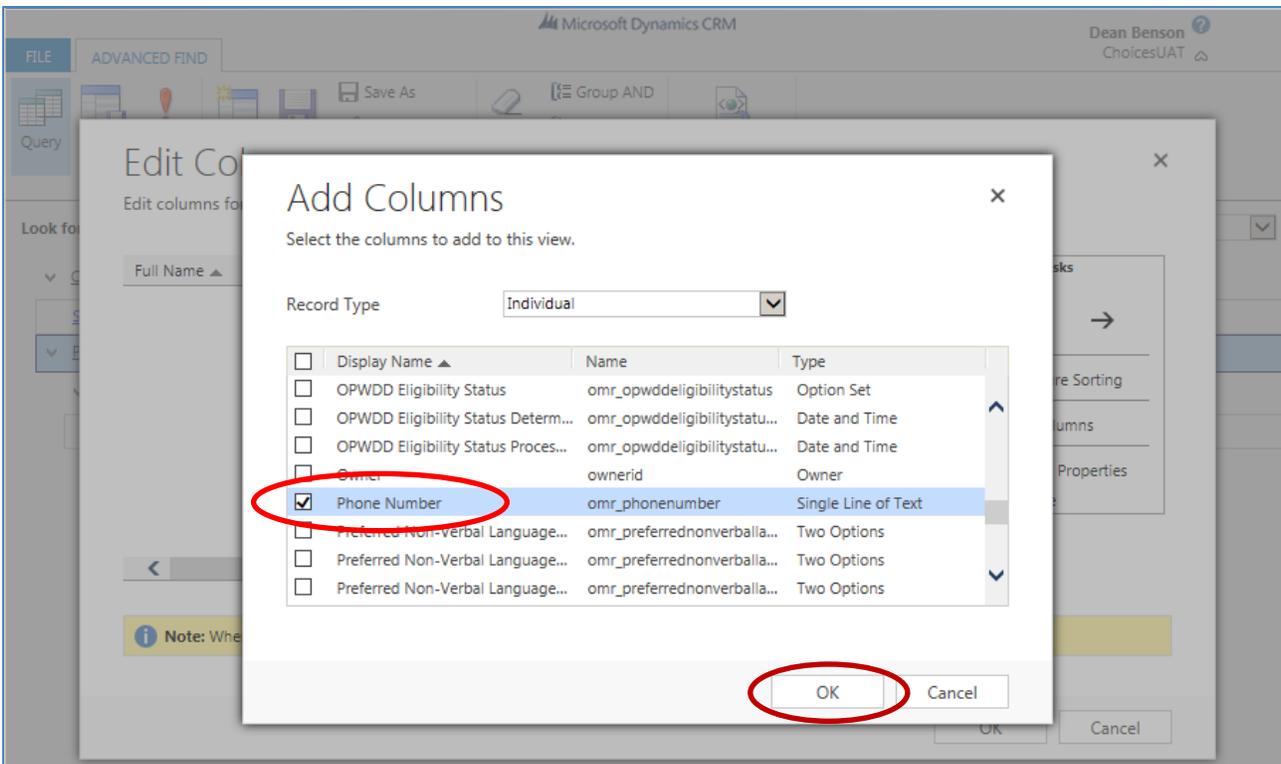
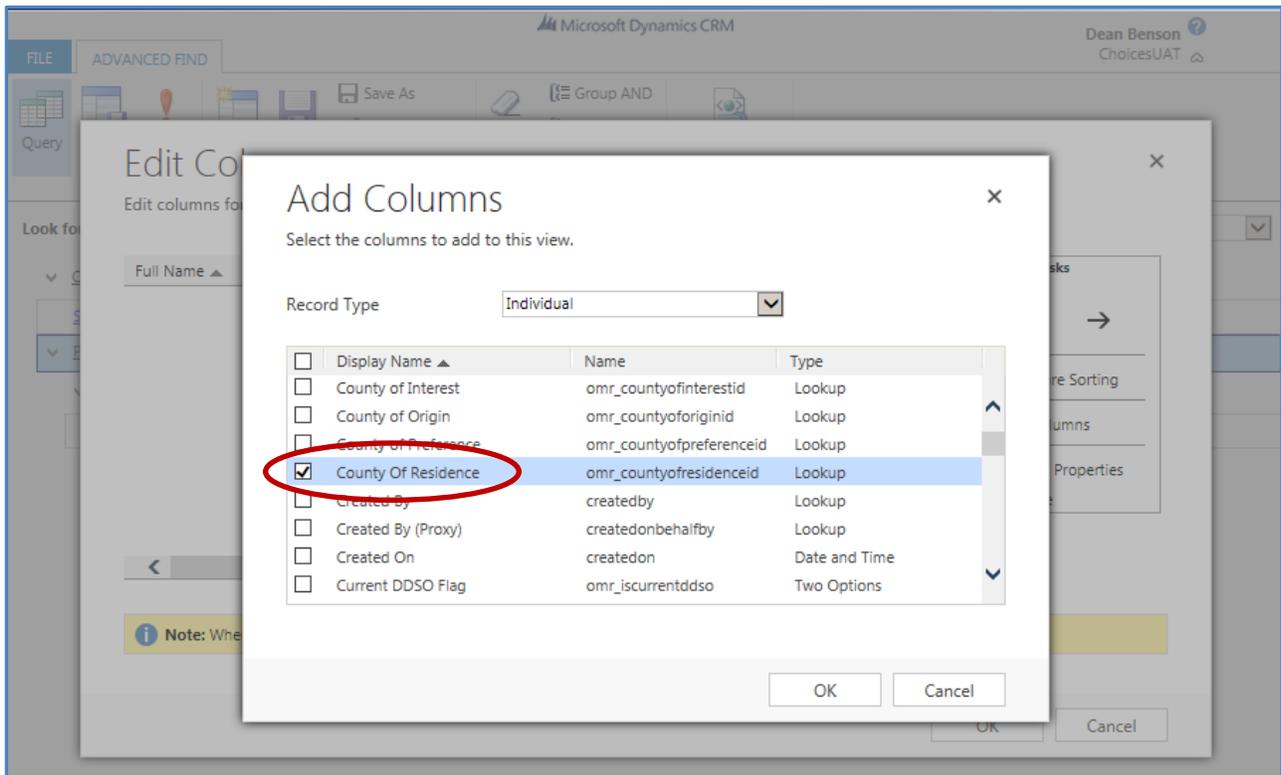
You can add or delete additional information, called adding columns, to show in the results of a query in the Advanced Find window by clicking on the “Edit Columns” button.



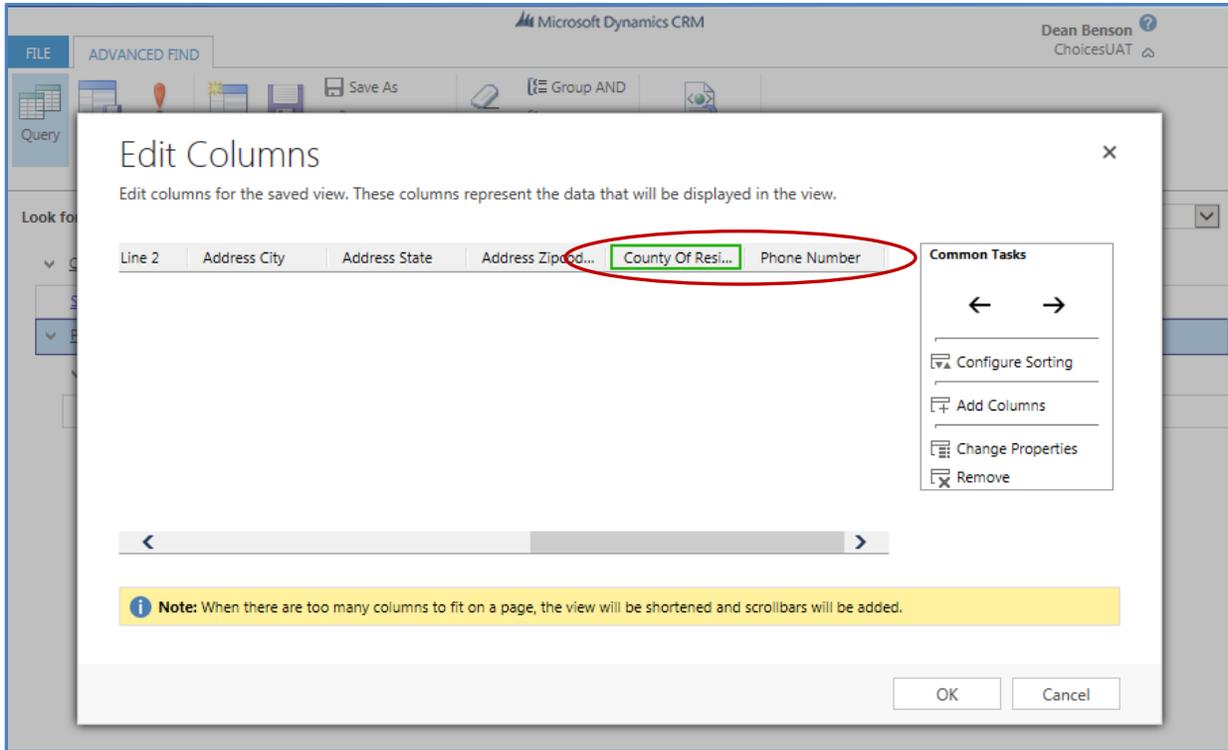
The Edit Columns dialog box will pop up with editing options that you can select in the right-hand box titled “Common Tasks”. To add columns to the query, click on “Add Columns” in the right-hand box of the dialog box.



An Add Columns dialog box will appear, allowing you to select one or more columns to add to your query. Select the columns “County of Residence” and “Phone Number”. Click the “OK” button when you are done.

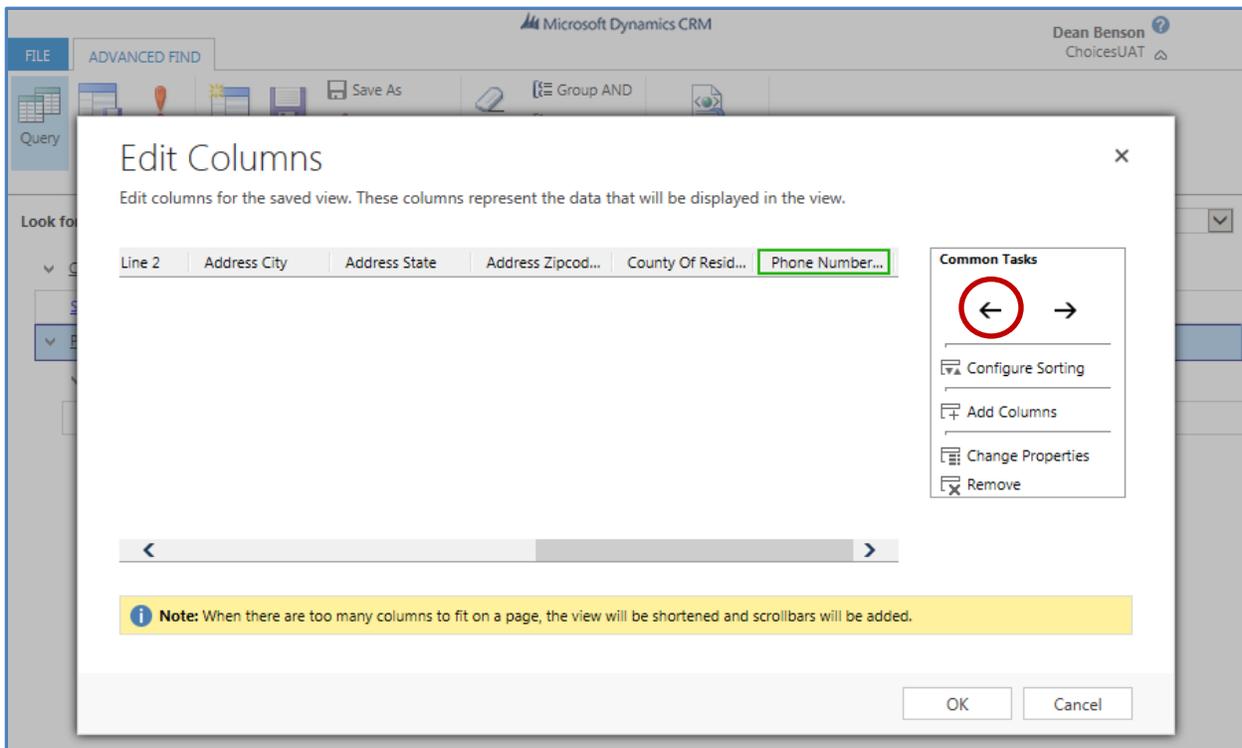


The selected columns now appear in the list of columns in the Edit Columns dialog box. As shown below.

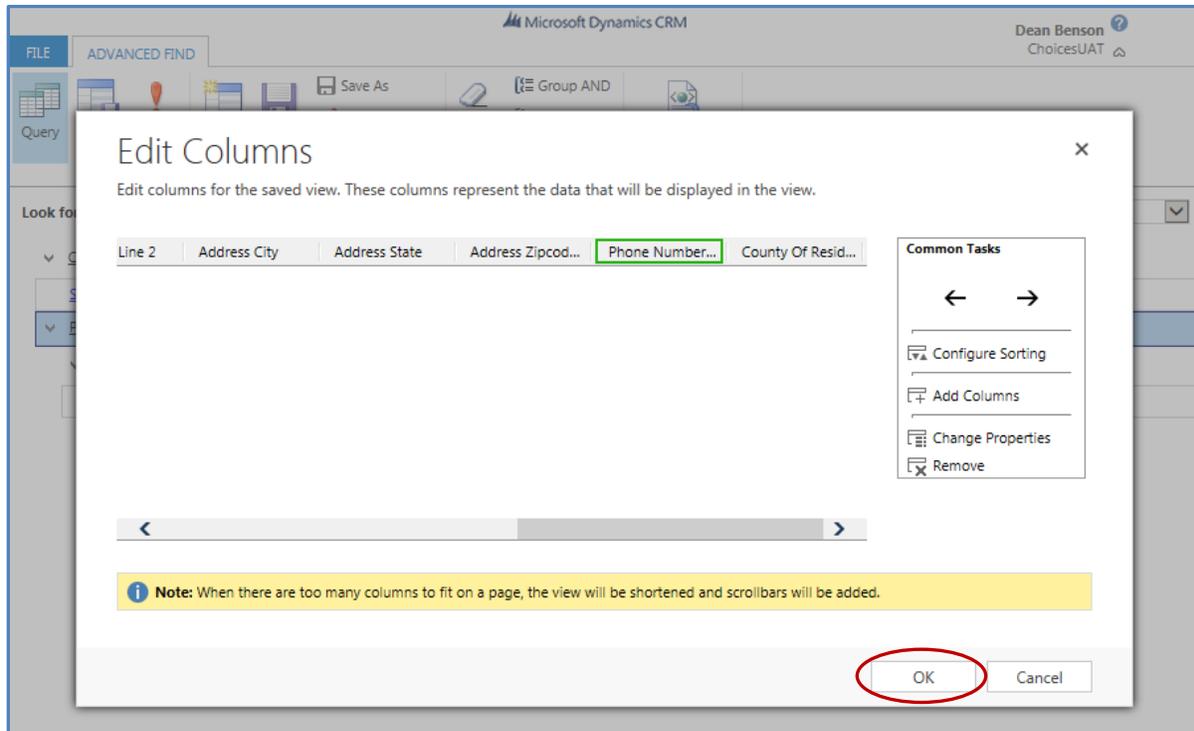


To remove any column from the query, click on that column name in the Edit Columns dialog box so it has a green box around it and then click "Remove" located in the Common Tasks box.

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.



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.



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

Microsoft Dynamics CRM
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FILE ADVANCED FIND LIST TOOLS INDIVIDUALS

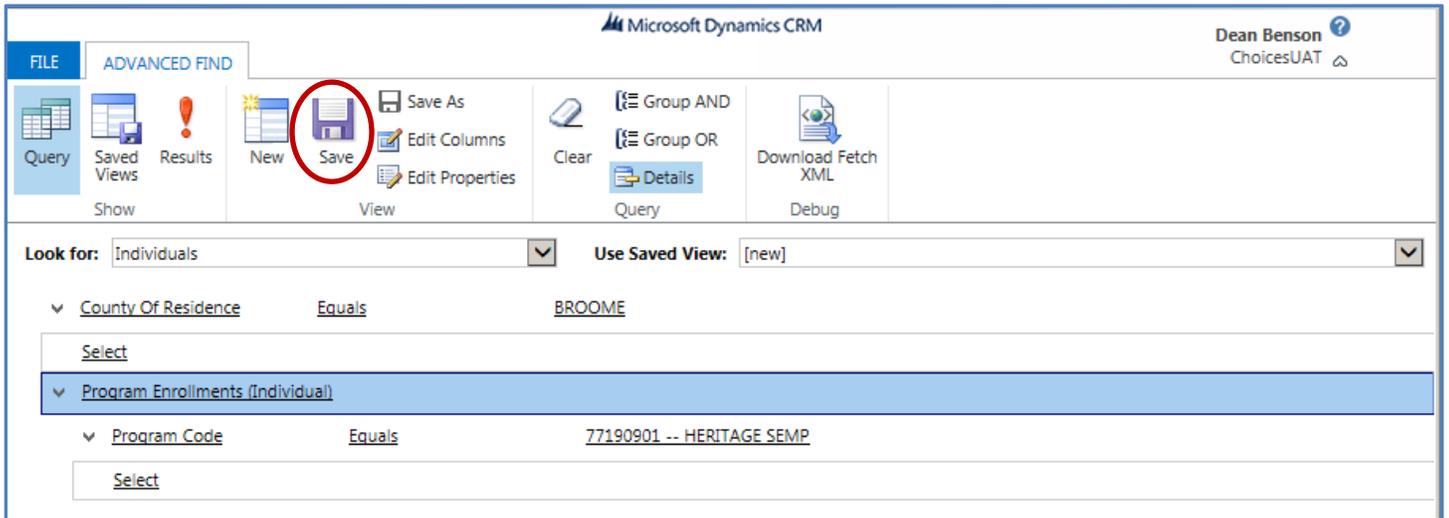
Share Copy a Link Email a Link Collaborate

FAQ Run Workflow Start Dialog Run Report Export Individuals

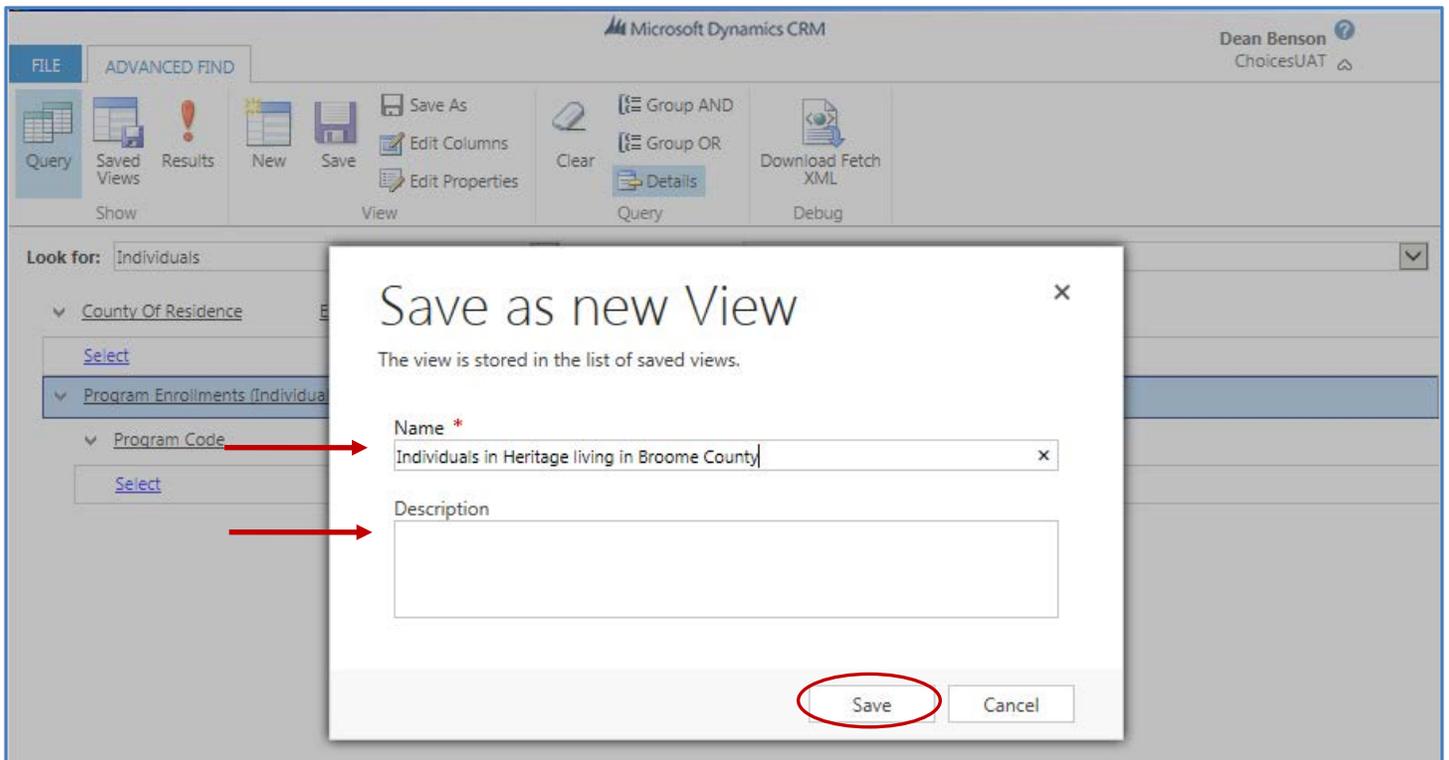
Birth	Medicaid Numb...	Address Line 1	Address Line 2	Address City	Address State	Address Zipcode...	Phone Number ↓	County Of Resic
7/9/1995	CS53703R	2295 ABBOTT GR...		BINGHAMTON	NEW YORK	14489	555-885-2034	BROOME
12/8/2003	EF44014M	558 KIERSTED Y...		MAINE	NEW YORK	11432	555-446-5197	BROOME
1/8/2004	ED36471C	15268 GYLNN L...		BINGHAMTON	NEW YORK	06460	555-311-57	BROOME
12/3/1998	CZ66162K	4146 ALLISON B...		BINGHAMTON	NEW YORK	11221-0235	555-291-1459	BROOME
7/12/1999	DD25225V	4227 NORTHWE...		BINGHAMTON	NEW YORK	11867	555-146-9684	BROOME

Saving a Query

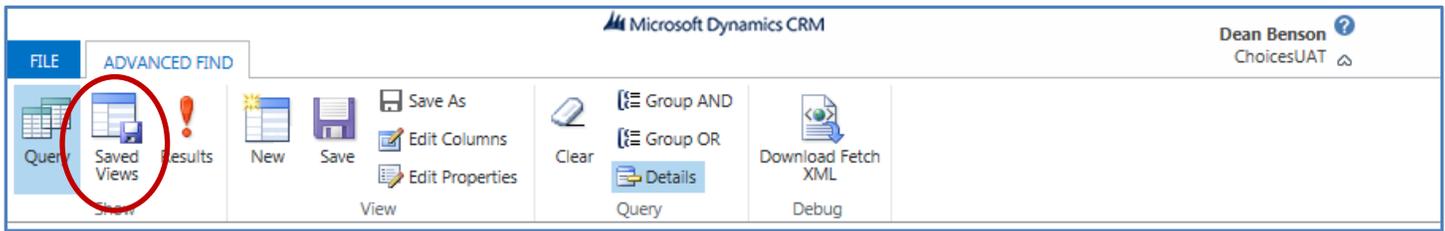
To save a query, also known as a Saved View, for future use without having to recreate it, in the “Advanced Find” tab, click on the “Save” button.



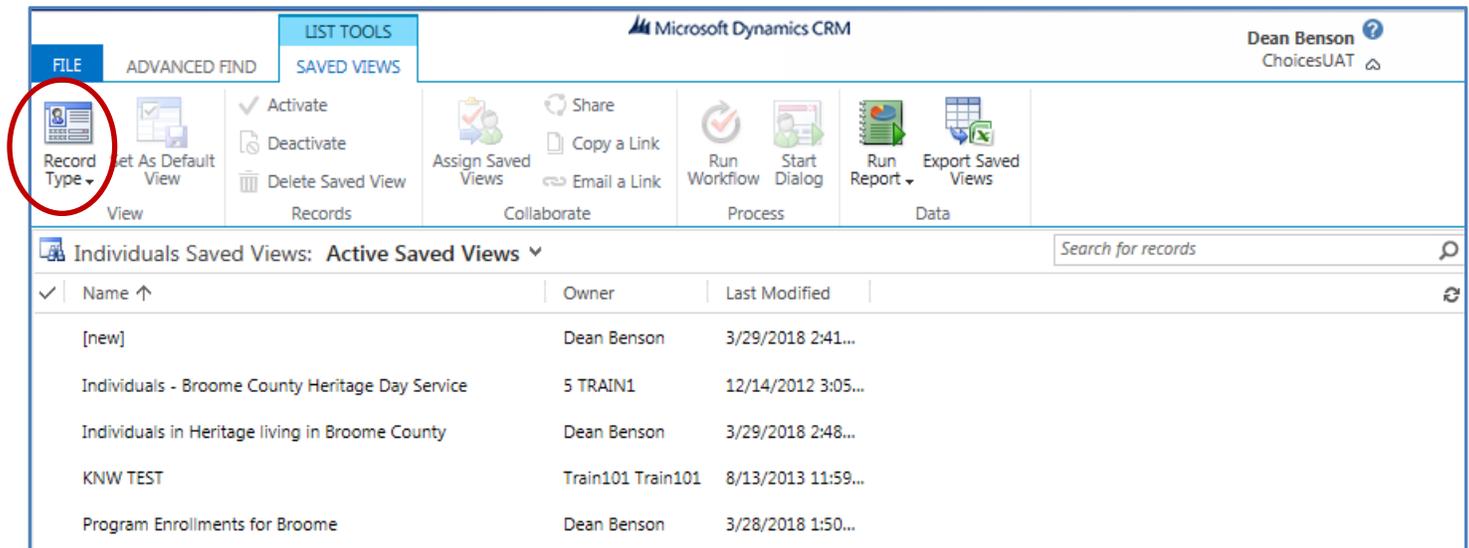
The Save as new View dialog box will pop up. You must enter a name for the query/view. It is optional to enter also enter a brief description. Click the “OK” button when you are ready to save the query as a View for future use.



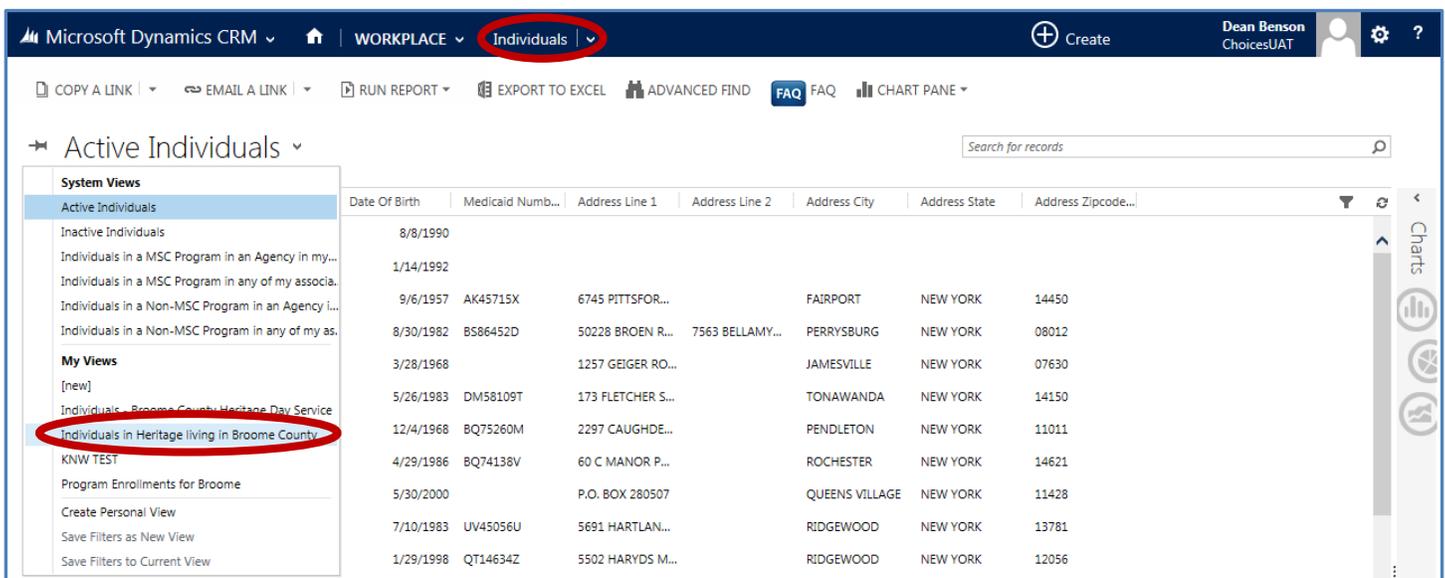
To access the saved query/view, or any other previously Saved Views within that Record Type (e.g. Individuals), click on the “Saved Views” button in the “Advanced Find” tab of the Advanced Find window. Then click on the Name of the Saved View that you want to use.



Note that the default view is to show the saved queries only within that Record Type. For instance, in the example presented, the Record Type is “Individuals. 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”.



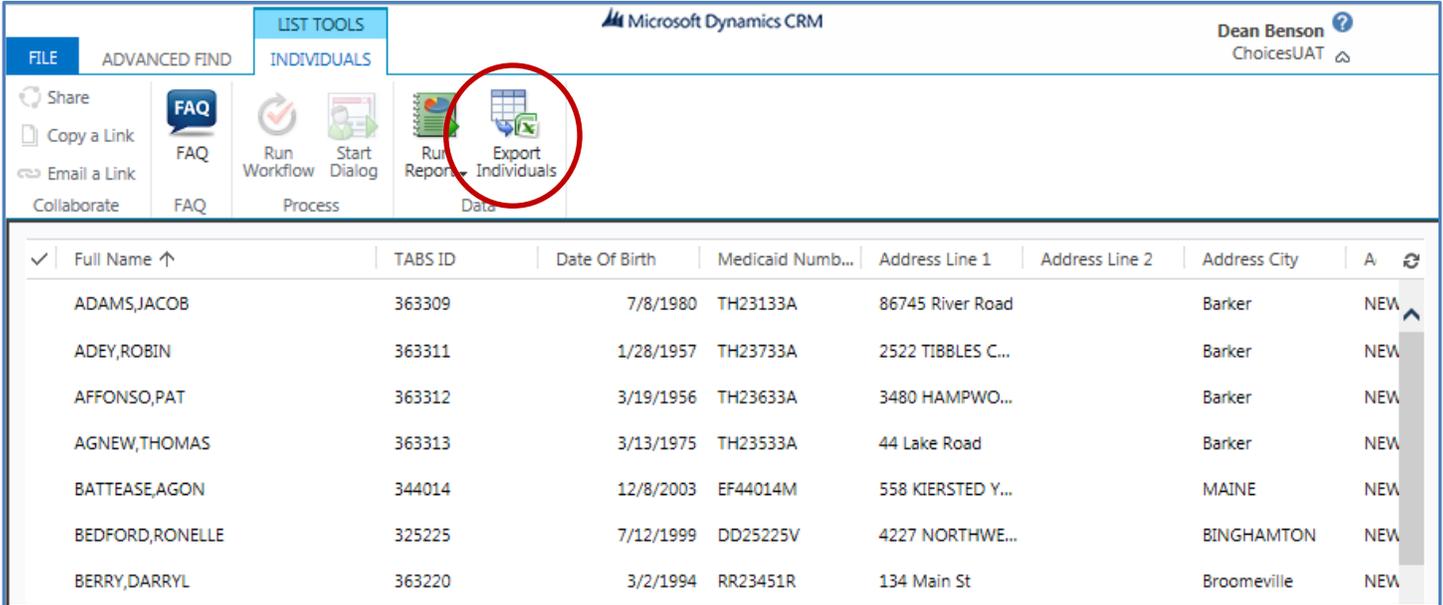
A Saved View may also be accessed by using the drop-down list under “My Views” for that particular Record Type (e.g. Individuals). Select the View to display the records that match the criteria for that query. The query results will update automatically as data changes.



Exporting to Excel

When you run a query in the Advanced Find window and get the desired results, you can export the current data set to a Microsoft Excel spreadsheet. Note that the rows of data that can be exported are limited to 10,000. You may need to adjust your query if results exceed this amount.

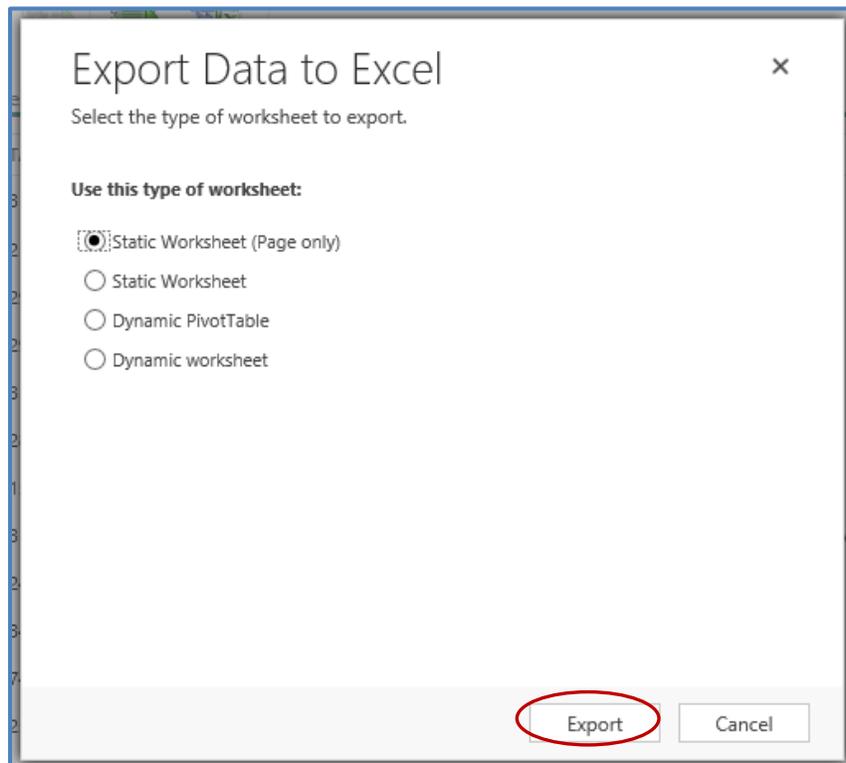
To perform this function, click on the “Export Individuals” button.



The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'FILE', 'ADVANCED FIND', and 'LIST TOOLS'. Under 'LIST TOOLS', the 'INDIVIDUALS' tab is active. The 'Export Individuals' button is circled in red. Below the navigation bar is a table of data with columns: Full Name, TABS ID, Date Of Birth, Medicaid Numb..., Address Line 1, Address Line 2, Address City, and A. The table contains several rows of individual records.

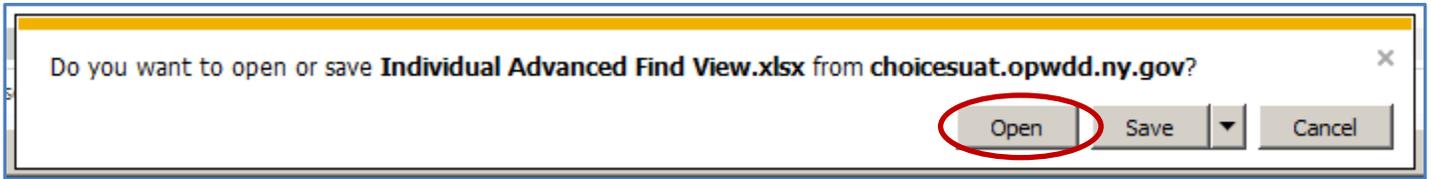
Full Name ↑	TABS ID	Date Of Birth	Medicaid Numb...	Address Line 1	Address Line 2	Address City	A
ADAMS,JACOB	363309	7/8/1980	TH23133A	86745 River Road		Barker	NEW
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BEDFORD,RONELLE	325225	7/12/1999	DD25225V	4227 NORTHWE...		BINGHAMTON	NEW
BERRY,DARRYL	363220	3/2/1994	RR23451R	134 Main St		Broomeville	NEW

An Export Data to Excel dialog box will pop up with options to export. The default option is “Static worksheet (Page only).” This option returns only the data on that specific page. To export the data from all pages, select “Static Worksheet” and click the “Export” button.



The screenshot shows the 'Export Data to Excel' dialog box. It has a title bar with a close button (X). The main text says 'Select the type of worksheet to export.' Below this, there is a section titled 'Use this type of worksheet:' with four radio button options: 'Static Worksheet (Page only)' (selected), 'Static Worksheet', 'Dynamic PivotTable', and 'Dynamic worksheet'. At the bottom right, there are two buttons: 'Export' (circled in red) and 'Cancel'.

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.

Sharing a Saved View

To share a Saved View with another CHOICES User, you may do so in the Advanced Find window. In the “Advanced Find” tab, click on the “Saved Views” button.

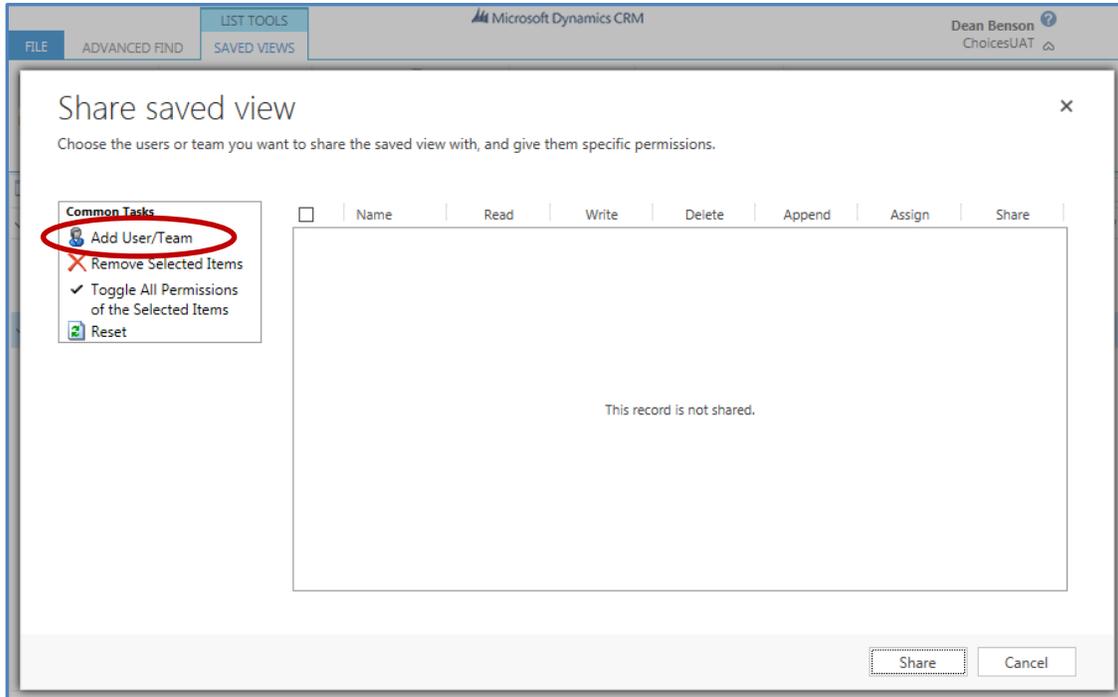
Microsoft Dynamics CRM interface showing the Advanced Find window. The "Saved Views" button in the ribbon is circled in red. The search criteria are: Look for: Individuals; Use Saved View: Individuals in Heritage living in Broome County; County Of Residence Equals BROOME; Program Code Equals 77190901 -- HERITAGE SEMP.

When the Saved Views are listed, highlight the one you wish to share by clicking next to the name. Then click the “Share” icon at the top center of the Advanced Find window.

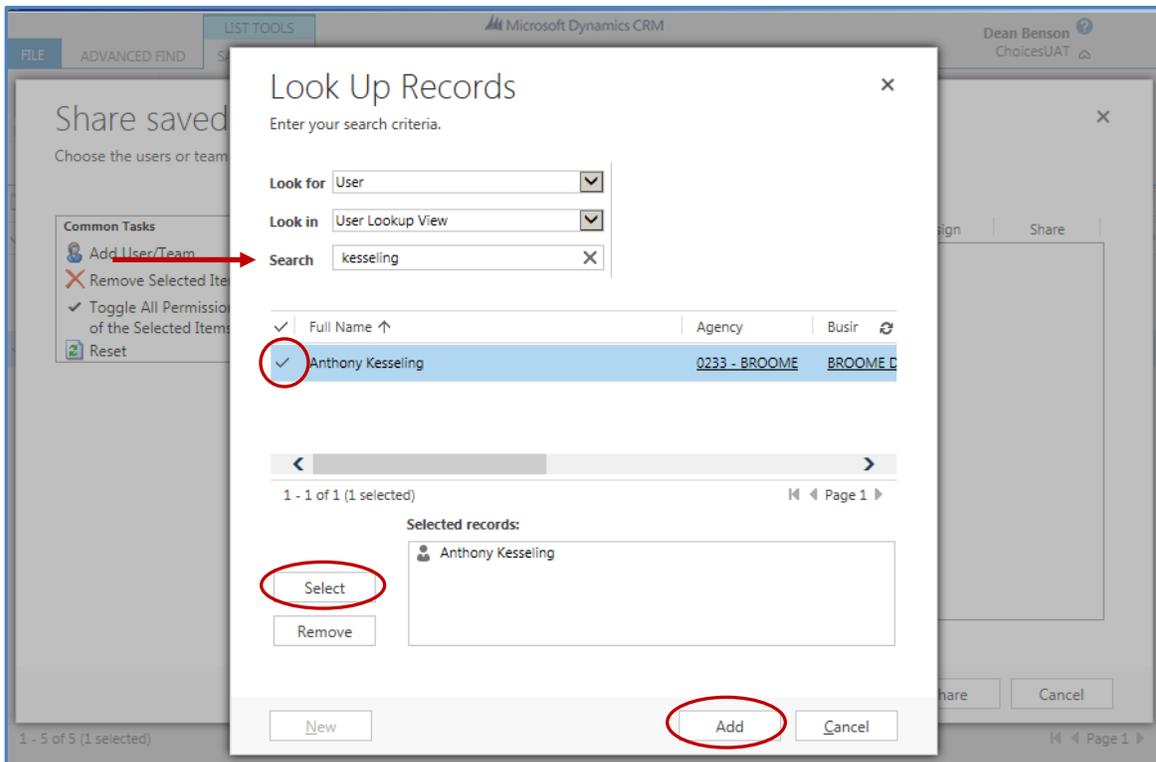
Microsoft Dynamics CRM interface showing the Advanced Find window with the LIST TOOLS ribbon. The "Share" icon is circled in red. The table below shows the list of saved views:

Name	Owner	Last Modified
[new]	Dean Benson	3/29/2018 2:41...
Individuals - Broome County Heritage Day Service	5 TRAIN1	12/14/2012 3:05...
Individuals in Heritage living in Broome County	Dean Benson	3/29/2018 2:48...
KNW TEST	Train101 Train101	8/13/2013 11:59...
Program Enrollments for Broome	Dean Benson	3/28/2018 1:50...

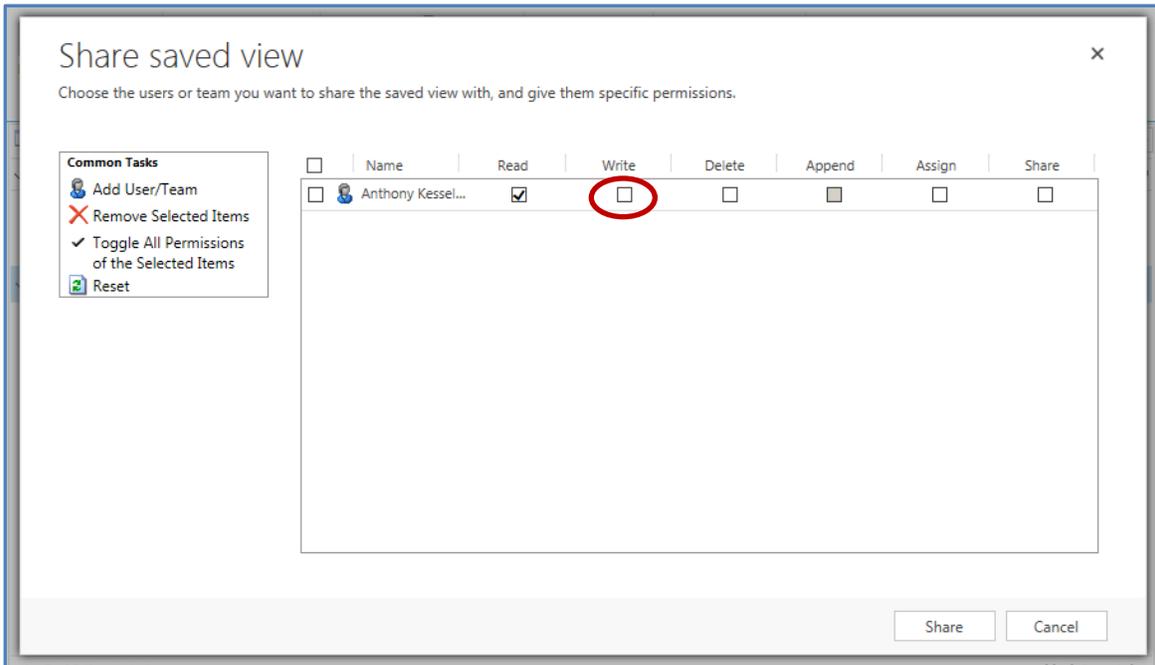
A Share saved view dialog box will appear. In the left-hand box titled “Common Tasks,” click on “Add User/Team.”



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.



You will get confirmation in the Share saved view 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.



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.

