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# How To Look up an Entity using the Bio - Detail Template

Ver. 1.1

2/6/2019

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1. Log in to Advance.
2. Click on the Binoculars (Lookup Tool.)

The screenshot shows the ADVANCE web application interface. At the top, the word "ADVANCE" is displayed on the left. On the right, there are links for "Clear Local Storage (TMS)", "Purge Cache", and the user name "Chris Farris [Logoff]". Below these links is a navigation bar containing several icons: a home icon, a pencil icon, a binoculars icon (circled in green with a green arrow pointing to it from the instructions), an eye icon, a globe icon, a clipboard icon, a question mark icon, and a red 'X' icon. To the right of these icons are three green circular buttons with arrows.

Below the navigation bar is a sidebar on the left with a "Home" tab and a list of menu items: "Annual Fund", "Gift & Bio", "Alerts/Messages", and "Change Password". The main content area has a "Home" header with an "Actions" link. Below the header, a message states: "You are logged on as Mr. Christopher Farris on the ADVTRAIN database. Welcome to Advance. Today is Monday, February 04, 2019." Below this message is a "Tasks (50402)" section with "Actions" and "Help" links. It contains a table with the following data:

Scheduled	Name	Task	Status
10/18/2018	[REDACTED]	Solicitation Plan	Cancelled

Below the table is an "Undergraduate Giving Statistics (100516)" section with "Actions" and "Help" links. At the bottom, there are two columns: "Last Fiscal Year" and "This Fiscal Year".

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- Using the **Bio - Entity** template to search for Entities (This is the screen you are on by default.) See next page for breakdown of commonly used search fields.

**ADVANCE** Clear Local Storage (TMS) | Purge Cache **Chris Farris** (Logoff)

Home x Lookups - Bio - Entity x

**Lookups** Actions

1. Choose a template (optional) **Bio - Entity**

2. Select results format\* Entity Lookup List

3. Select output type\* Display results

4. Select additional criteria from page tree (optional)

5. Enter criteria below and click Search

View Criteria Clear Search

**ID Lookup (70037)** Help

ID Equal [ ]

Alt ID Equal [ ] **A**

**Entity Lookup (70036)** Help

Sounds Like

**B** Last/Org Name Begins with [ ]

First Begins with [ ]

Middle Begins with [ ]

Name Type Equal [ ] (all)

Record Status Equal [ ] (all)

Primary Record Type Equal [ ] (all)

**C** School Equal [ ] (all)

Class Equal [ ]

Solicit Cntrl Equal [ ] (all)

Lookup Equal [ ] (all)

Affiliation Code Equal [ ] (all)

Affiliation Status Equal [ ] (all)

Deleted Equal [ N ] Not Deleted

VIP Equal [ (All) ]

Person or Org Equal [ (All) ]

**Address Lookup (70031)** Help

Preferred Equal [ ] (all)

Type Equal [ ] (all)

**D** City Equal [ ]

State Equal [ ] (all)

Country Equal [ ] (all)

ZIP Code Begins with [ ]

Current Equal [ (All) ]

**Geo Code Lookup (70032)** Help

**E** Type Equal [ ] (all)

Geo Code Equal [ ] (all)

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*IMPORTANT! MOST SEARCH BLOCKS ARE OPTIONAL. THE GOAL TO SEARCHING IN ADVANCE IS TO FIND WHAT YOU ARE LOOKING FOR. USE THE BLOCKS **ONLY** WHEN NECESSARY TO NARROW YOUR SEARCH. IT'S THAT EASY.*

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- A. The ID block. Advance defaults to the **Bio - Entity** template for this block. Use the:
- ID** - if you already know the entities ID number enter it here to go directly to the entity record. (e.g. 1931 or 532188)
  - Alt ID** - Enter any other IDs known about the Entity. Suggestions:
    1. Alumni Member ID

**LAST/ORG NAME HELPFUL HINT!**

Consider changing the  to . This will give you more latitude when trying to find a business or organization when you cannot remember its full name.

2. KUAF Membership IP
  3. Staff ID
  4. Student ID
  5. First Five of Social Security
  6. Hog Tag ID
- B. The name blocks.
- Last/Org Name** - Use this block to enter the entity's last name OR the organization's full name.
  - First** - Use for entity's first name.
  - Middle** - Use for entity's middle name.
- C. The attendance blocks.
- School** - Use this dropdown to choose the entity's school if they attended the University of Arkansas.

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- b. **Class** - Type the year that the student graduated in this block.
- D. The address blocks:
  - a. **City** - Entity's city

### School AND Class HELPFUL HINT!

Remember most search blocks are optional. Only use these two if you are attempting to narrow your search results. This is true of most search blocks.

- b. **State** - Entity's state
- c. **Country** - Entity's country
- d. **ZIP Code** - Entity's ZIP Code
- E. The GEO Code blocks:
  - a. Use these codes with GEO Code information provided in other documentation.

### City, State, Country AND ZIP Code

#### HELPFUL HINT!

Advance keeps multiple addresses for entities. The records team does periodic address updates so it is possible to search for an entity by a previous address not just the current or preferred address.

Remember most search blocks are optional. Only use these four if you are attempting to narrow your search results. This is true of most search blocks.

- 4. Click **Search**.

Remember that many people go by their middle names. If the **First** name block does not work, try the entity's first name in the **Middle** name block.

### First AND Middle HELPFUL HINT!

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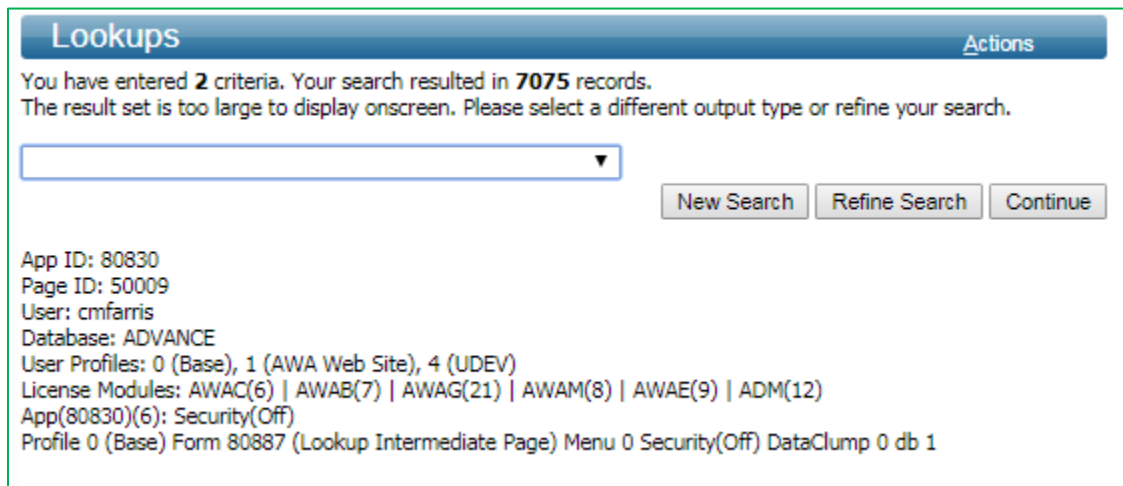
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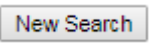
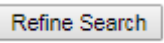
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5. This is a **Lookups** when the search is too broad. If you get a result like this back. Advance is telling you you need to either dump the results to a spreadsheet (**DANGER: THE RESULTS OF THIS SHOULD NOT BE USED AS A REPORT. THIS DATA DUMP WILL CONTAIN PEOPLE WHO ARE DECEASED AND PEOPLE WHO WILL BE VERY UPSET IF WE EVER CONTACT THEM.**) or narrow your search.



The screenshot shows a web interface titled "Lookups" with an "Actions" button in the top right. Below the title, a message states: "You have entered 2 criteria. Your search resulted in 7075 records. The result set is too large to display onscreen. Please select a different output type or refine your search." Below this message is a dropdown menu with a downward arrow. To the right of the dropdown are three buttons: "New Search", "Refine Search", and "Continue". Below the buttons, the following text is displayed: "App ID: 80830", "Page ID: 50009", "User: cmfarris", "Database: ADVANCE", "User Profiles: 0 (Base), 1 (AWA Web Site), 4 (UDEV)", "License Modules: AWAC(6) | AWAB(7) | AWAG(21) | AWAM(8) | AWAE(9) | ADM(12)", "App(80830)(6): Security(Off)", and "Profile 0 (Base) Form 80887 (Lookup Intermediate Page) Menu 0 Security(Off) DataClump 0 db 1".

In this example there are 7075 records. It is highly suggested that you narrow your search.

- New Search**  - This will return you to a clean search window to begin again.
- Refine Search**  - This takes you a refinement page that is **NOT** covered in this document.

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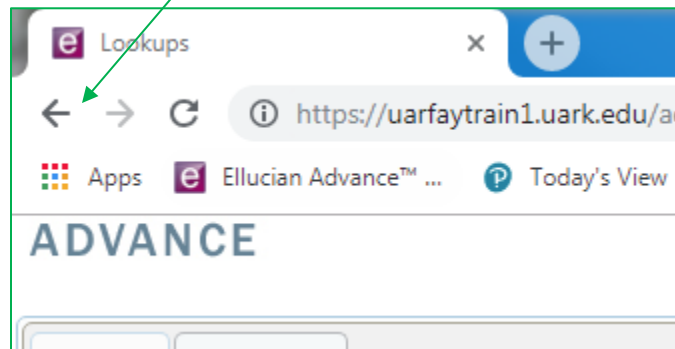
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### c. THE BEST WAY TO REFINE YOUR SEARCH.

- i. Click on the back button of your browser.



Using the back button will return you to your previous search so you can narrow further.

6. This is what an unsuccessful **Lookups** looks like.

**Lookups** Actions

You have entered **3** criteria. Your search resulted in **0** records.

App ID: 80830  
Page ID: 50009  
User: cmfarris  
Database: ADVANCE  
User Profiles: 0 (Base), 1 (AWA Web Site), 4 (UDEV)  
License Modules: AWAC(6) | AWAB(7) | AWAG(21) | AWAM(8) | AWAE(9) | ADM(12)  
App(80830)(6): Security(Off)  
Profile 0 (Base) Form 80887 (Lookup Intermediate Page) Menu 0 Security(Off) DataClump 0 db 1

In this scenario, the entity you were looking for does not exist in the system. There are a few things that you can do:

- Middle name vs. First name as mentioned above
- Remove search fields. You may have been too restrictive.
- Try searching by alternate means. (i.e. Rather than use first and last name, try **First name**, **School** and **City**. The entity may have changed their last name.)

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7. This is what a successful **Lookup Results** looks like. See below for a breakdown of the page.

The screenshot displays the 'Lookup Results' interface. At the top, there is a header bar with 'Lookup Results' on the left and 'Actions' on the right. Below this, a navigation bar shows 'Items 1 to 6 of 6' with four circular navigation buttons (back, forward, first, last) and a 'D' label. To the right of the navigation bar are 'New Search' and 'Refine Search' buttons. The main content area is titled 'Entity Lookup List (50401) (1/6)' and includes 'Actions' and 'Help' links. The list contains several entries, each with a three-dot menu icon on the left. The first entry is highlighted with a green box labeled 'B' and 'C'. It shows a nickname '(Nickname) (Parent)', a date '08/05/1970 (48)', and an address '376 McKnight Avenue, West Fork, AR 72774-3144'. Other entries include a friend with ID #609723, a parent with ID #532188, a student with ID #686303, and another parent with ID #532188. Each entry also includes an address and a date.

## A. The VCR Buttons

- Items  to 6 of 6 - This shows the number of records that matched your search.
- - These allow you to go forward or backward through the **Lookup Results** if there are multiple pages of information.

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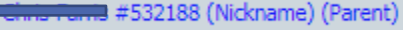
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### B. The Entity

-  - Click here to go to the Entity's record.
-  This is the name of the person on the record. Notice that in parenthesis this says Nickname. The number #532188 is how Advance knows this record idea. If you look at the sheet above, you'll see that 532188 shows up multiple times. Like this:

i. 

#### HELPFUL HINT!

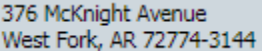

Just like real life, people have more than one name in Advance. You can see in the examples above that one of the names is a Nickname, another is a Complete name. Advance tracks records by Entity ID NOT name.

You can click on these blue links and it will take you to the Entity's record just like when you click on the ellipses. **NOTE: There are multiple names but ONLY one record per Entity ID.**

ii. 

-  Date of birth and age.

### C. Address information

-  Preferred and active street address.
-  Preferred and active email address.

#### HELPFUL HINT!

An entity can have more than one address. These addresses can be active or inactive. However, an entity can only have one PREFERRED address. The preferred address is where they want to receive their mail.

The same is true for email address and telephone number (not in this document.)



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- D.   Function as described on page 5.

