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

Ver. 1.1

2/6/2019

1. Log in to Advance.

2. Click on the Binoculars (Lookup Tool.)

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

Ver. 1.1

2/6/2019

3. 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.

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

Ver. 1.1

2/6/2019

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.

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

> **LAST/ORG NAME HELPFUL HINT!**
>
> Consider changing the `Begins with ▼` to `Contains ▼`. 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.
   a. Last/Org Name – Use this block to enter the entity's last name OR the organization's full name.
   b. First – Use for entity's first name.
   c. Middle – Use for entity's middle name.

C. The attendance blocks.
   a. School – Use this dropdown to choose the entity's school if they attended the University of Arkansas.

      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. [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.
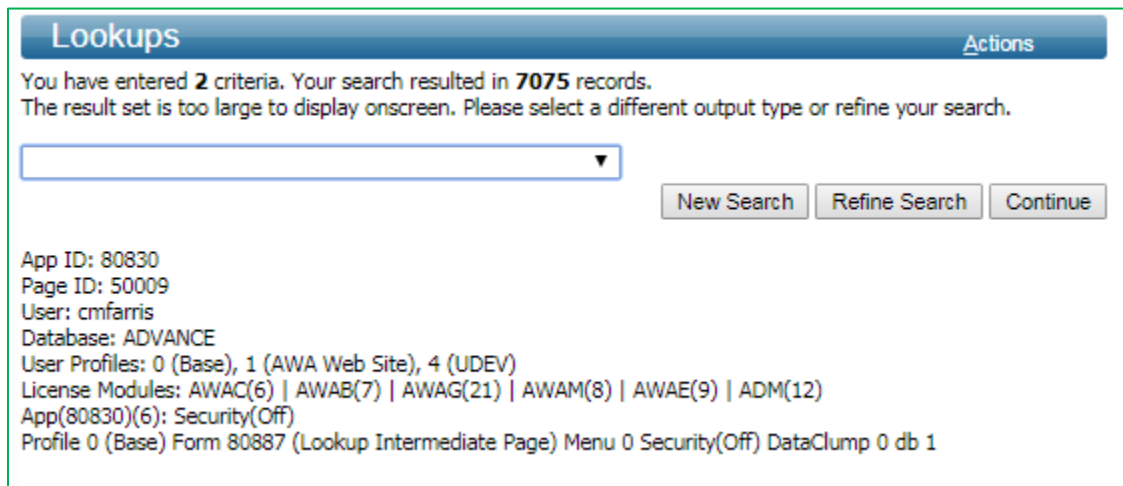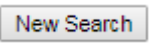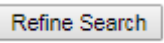>
> ### First AND Middle HELPFUL HINT!

5. This 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.

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

a. New Search ⬚ - This will return you to a clean search window to begin again.

b. Refine Search ⬚ - This takes you a refinement page that is NOT covered in this document.
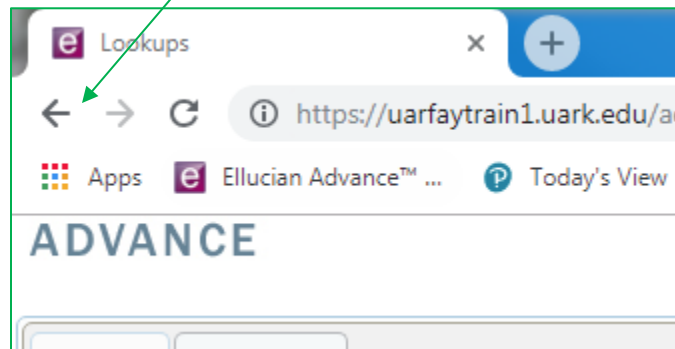
c. THE BEST WAY TO REFINE YOUR SEARCH.
   i. Click on the back button of your browser.

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.

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.)

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

Ver. 1.1

2/6/2019

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

A. The VCR Buttons

- Items 1 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.
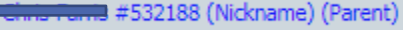
How To Look up an Entity using the Bio - Detail Template

Ver. 1.1

2/6/2019

B. The Entity

- ... - Click here to go to the Entity's record.
- Chris Ferris #532188 (Nickname) (Parent) 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:
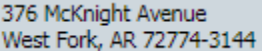   i. Mr #532188 (Parent)

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. Ch s #532188 (Complete) (Parent)
- 08/05/1970 (48) Date of birth and age.

C. Address information

- 376 McKnight Avenue
  West Fork, AR 72774-3144 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.)

D. New Search   Refine Search   Function as described on page 5.