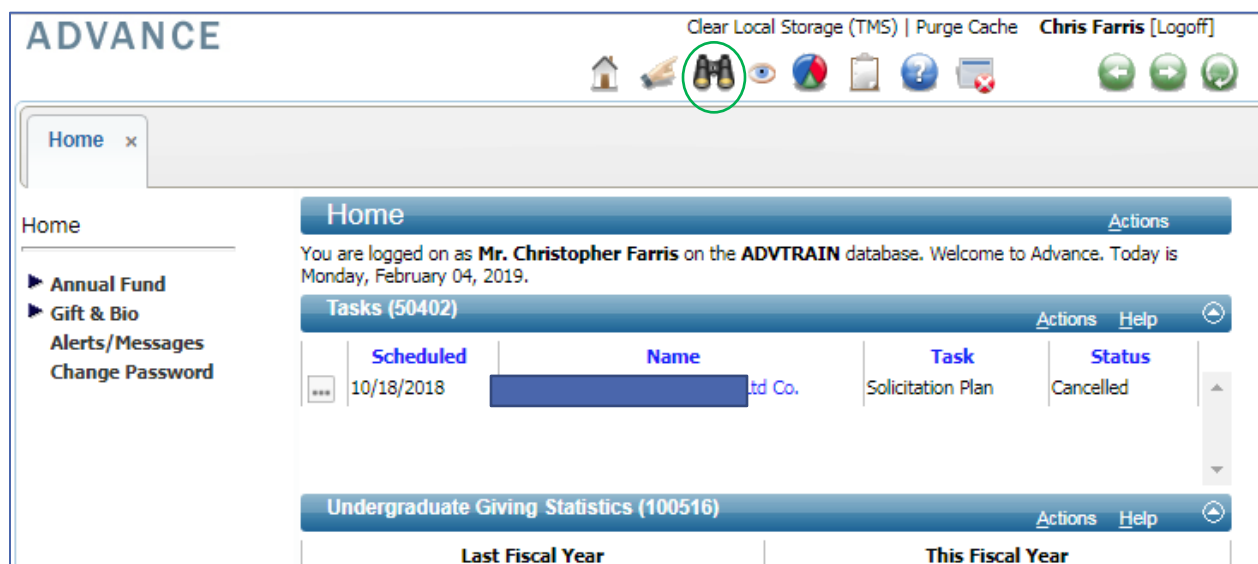


# How To Look Up Members of Alumni Chapters

Ver. 1.1

2/19/2019

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, and on the right, there are links for "Clear Local Storage (TMS) | Purge Cache" and the user's name "Chris Farris [Logoff]". Below these links is a row of icons: a house, a hand pointing, binoculars (circled in green with a green arrow pointing to it from the instructions), an eye, a globe, a clipboard, a question mark, and a red X. Below the icons is a "Home" tab with a close button. On the left side, there is a sidebar with links: "Home", "Annual Fund", "Gift & Bio", "Alerts/Messages", and "Change Password". The main content area has a "Home" header with an "Actions" link. Below this, 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 the message is a "Tasks (50402)" section with "Actions" and "Help" links. It contains a table with columns: "Scheduled", "Name", "Task", and "Status". The table has one row with the following data: "10/18/2018", "[REDACTED] Ltd Co.", "Solicitation Plan", and "Cancelled". Below the table is an "Undergraduate Giving Statistics (100516)" section with "Actions" and "Help" links. It contains a table with columns: "Last Fiscal Year" and "This Fiscal Year".

| Scheduled  | Name               | Task              | Status    |
|------------|--------------------|-------------------|-----------|
| 10/18/2018 | [REDACTED] Ltd Co. | Solicitation Plan | Cancelled |

| Last Fiscal Year | This Fiscal Year |
|------------------|------------------|
|------------------|------------------|

# How To Look Up Members of Alumni Chapters

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3. Choose **Biographic** from the Navigation Tree.

**ADVANCE** 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** Help

ID Equal  
Alt ID Equal

**Entity Lookup** Help

☐ 'Sounds Like'

Last/Org Name Begins with  
First Begins with  
Middle Begins with  
Name Type Equal (all)  
Record Status Equal (all)  
Primary Record Type Equal (all)  
School Equal (all)  
Class Equal  
Solicit Cntrl Equal (all)  
Lookup Equal (all)

# How To Look Up Members of Alumni Chapters

Ver. 1.1

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4. Choose **Comm Particip** (Committee Participation) from the **Navigation Tree**.

The screenshot displays the ADVANCE system interface. At the top, there is a header bar with the text 'ADVANCE' on the left and 'Clear Local Storage (TMS) | Purge Cache Chris Farris [Logoff]' on the right. Below the header, there is a navigation bar with tabs for 'Home' and 'Lookups - Biographic'. A green arrow points from the 'Comm Particip' option in the 'Lookups' sidebar to the 'Comm Particip' option in the 'Lookups' list. The 'Lookups' sidebar is on the left, showing a list of lookup categories under 'Saved Criteria...'. The 'Lookups' list is on the right, showing a table with columns 'ID' and 'Actions'. The 'ID' column contains the text 'ID (90257)' and the 'Actions' column contains a 'Help' link. The 'Lookups' list is currently empty. The 'Comm Particip' option is highlighted in the 'Lookups' list. The 'Lookups' list is currently empty.

Lookups

Saved Criteria...

- ▼ Biographic
- Activity
- Address
- Affiliation
- Award/Honor
- Bank Card
- Birth & Death
- Children
- Comment
- Comm Particip**
- Comm Tracking
- Cvr Account
- Degree
- eContact
- Email
- Employment
- Entity - Org
- Entity - Person
- Entity - Deleted
- Entity Rec Type
- Geo Code
- ID
- Interest
- Mail Control
- Mailing List
- Marital Info
- Matching Policy
- Named Spaces
- Name
- Org Contact

Lookups

| ID  | Actions |
|---|---------|
| 1. Choose a template (optional)   |         |
| 2. Select results format*   |         |
| 3. Select output type*  |         |
| 4. Select additional criteria from page tree (optional)                           |         |
| 5. Enter criteria below and click Search  |         |
| <input type="button" value="View Criteria"/> <input type="button" value="Clear"/> |         |
| <input type="button" value="Search"/>   |         |

ID (90257) Help

ID Equal

Alt ID Equal

Type Equal (all)

☐ 'Sounds Like'

Type Equal (all)

Last Begins with

First Begins with

App ID: 90257  
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(90257)(6): Security(Off)  
Profile 0 (Base) Form 80716 (Lookup Header) Security(Off) DataClump 0 db 1  
Profile 0 (Base) Form 90257 (ID Tab) Menu 50006 Security(Off) DataClump 0 db 1

## How To Look Up Members of Alumni Chapters

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5. Choose the Chapter you are looking for in the **Committee** drop-down. Use any other search blocks necessary to limit your results.

The screenshot shows a web interface for looking up committee members. At the top, there is a header bar with the title "Committee" and an "Actions" link. Below this, there are five numbered steps for the user to follow: 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. There are input fields for steps 1, 2, and 3, and buttons for "View Criteria", "Clear", and "Search". Below the search criteria, there is a section titled "Committee (90045)" with a "Help" link and a search icon. This section contains a list of search criteria, each with a dropdown menu set to "Equal". The criteria are: Committee, Group, Status, Addr Type, Fax, Email, Control, Role, Geo Type, Geo Code, Data Src, Source, Class, Start, and Stop. The "Committee" dropdown menu is open, showing a list of chapters: Chicago Chapter - AAA Chapter (CH) (CH), College of Engineering Early Career Advi (ECEA), Conway Chapter - AAA Chapter (CH) (FAU), D.C. Chapter - AAA Chapter (CH) (DCD), Dallas Area Chapter - AAA Chapter (CH) (DAL), Deans Advisory Council ENGR - Fundraising Council (AD) (ENDAC), and D435 Committee (D435). A green arrow points from the text in step 5 to the "Committee" dropdown menu.

| Criteria  | Operator | Value  |
|-----------|----------|--|
| Committee | Equal    | (all)  |
| Group     | Equal    | Chicago Chapter - AAA Chapter (CH) (CH)                        |
| Status    | Equal    | College of Engineering Early Career Advi (ECEA)                |
| Addr Type | Equal    | Conway Chapter - AAA Chapter (CH) (FAU)                        |
| Fax       | Equal    | D.C. Chapter - AAA Chapter (CH) (DCD)                          |
| Email     | Equal    | Dallas Area Chapter - AAA Chapter (CH) (DAL)                   |
| Control   | Equal    | Deans Advisory Council ENGR - Fundraising Council (AD) (ENDAC) |
| Role      | Equal    | D435 Committee (D435)  |
| Geo Type  | Equal    | (all)  |
| Geo Code  | Equal    | (all)  |
| Data Src  | Equal    | (all)  |
| Source    | Equal    | (all)  |
| Class     | Equal    |  |
| Start     | Equal    | / /  |
| Stop      | Equal    | / /  |

6. Click **Search**.

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## 7. Review search results.

Lookup Results

Items 1 to 7 of 24

New Search

Refine Search

Entity Lookup List (50401) (1/24)

Actions Help

|   |                                |                 |
|---|--------------------------------|-----------------|
| ...   | (Alumni Fulbright 2011)        | 07/02/1989 (29) |
| 5664 Woodmen Ridge View, Apt. 203<br>Colorado Springs, CO 80923-5230      |                                |                 |
| ...   | 7627 (Alumni Engineering 2008) | 06/29/1985 (33) |
| 9419 Lake Lily Avenue<br>Baton Rouge, LA 70810-2735                       |                                |                 |
| ...   | Alumni Walton 2004)            | 08/08/1981 (37) |
| 5228 R Street<br>Little Rock, AR 72207-4623                               |                                |                 |
| ...   | (Alumni Law 2010)              | 02/10/1985 (34) |
| Apartment 316<br>915 E Street, NW<br>Washington, DC 20004-2011            |                                |                 |
| ...   | (Alumni Fulbright 2015)        | 09/16/1992 (26) |
| c/o Mark S. Humphrey<br>18190 Berry Hill Drive<br>Stilwell, KS 66085-9433 |                                |                 |
| ...   | (Alumni Fulbright 2011)        | 07/02/1989 (29) |
| 728 Harvard Street, NW<br>Washington, DC 20001-3810                       |                                |                 |
| ...   | 469 (Alumni Fulbright 2016)    | 06/05/1994 (24) |
| Apartment 327<br>1600 Maryland Avenue, NE<br>Washington, DC 20002-7664    |                                |                 |

Items 1 to 7 of 24