

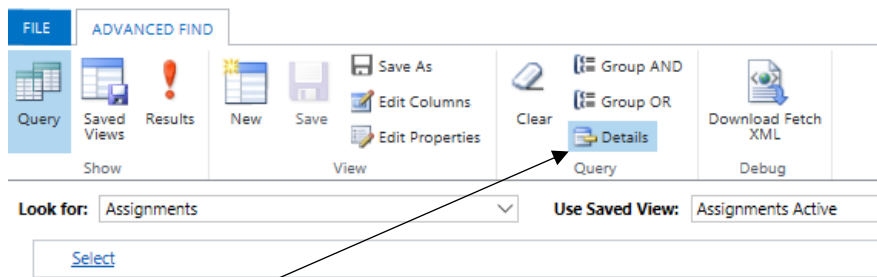
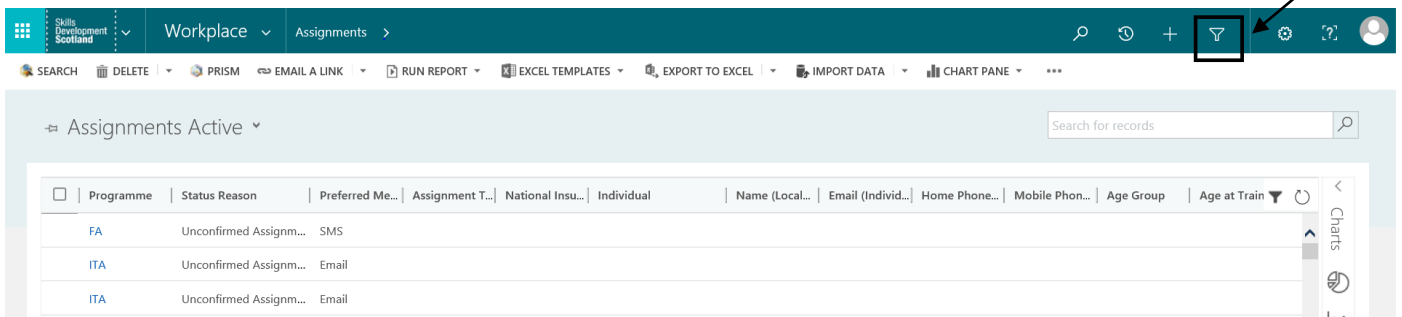
FIPS QUICK START GUIDE

Using Advanced Find

This guide provides basic instructions on how to use the Advanced Find function in FIPS. There are many different configurations and users will need to vary these depending on what data is being queried / reported on. For the purposes of this guide, an example will be shown of creating an Advanced Find to report on Overdue Expected End Dates. FIPS users can find more information in relation to Advanced Find online as this function is not unique to FIPS and is a standard Microsoft Dynamics feature.

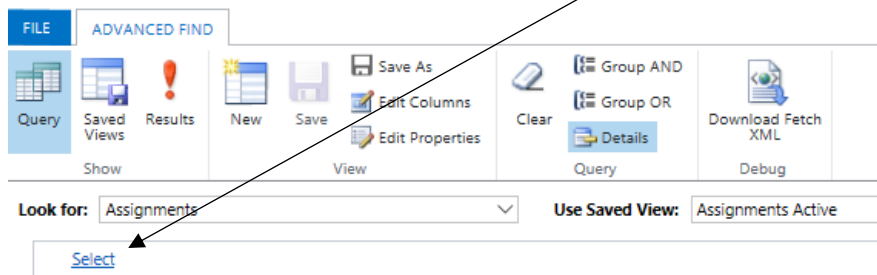
Creating a Personal View

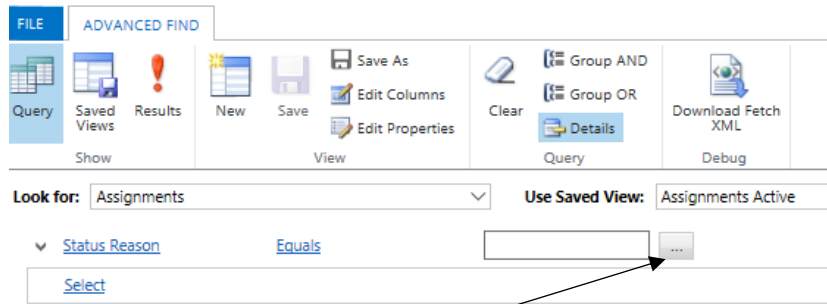
1. From the Assignments entity click on Advanced Find icon from the ribbon. Depending on the information users are querying, the relevant entity should be selected. The Advanced Find function can also be selected from the Training Provider Dashboard (FIPS homepage) and relevant entity selected from there.



The Advanced Find screen will appear; click on 'Details' in the ribbon so that the search criteria can be selected.

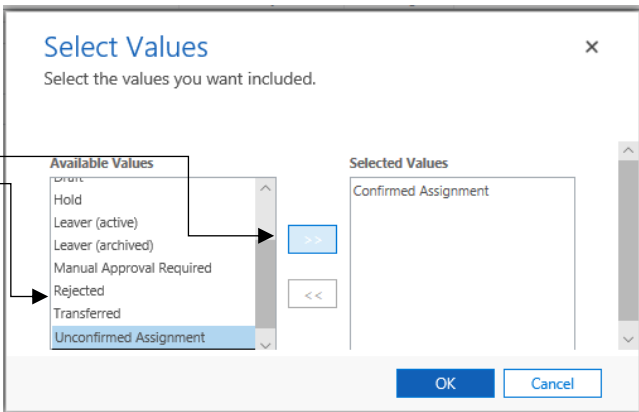
Click into 'Select' so the dropdown menu of fields available to report on appears. These fields are fields / entities in FIPS.



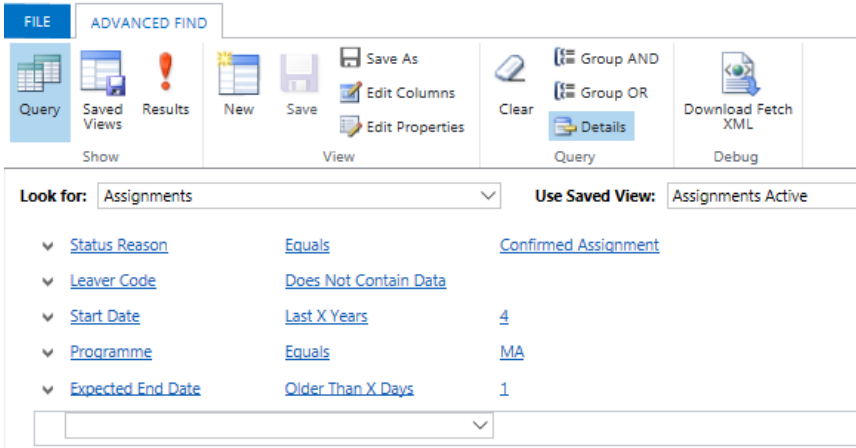


Select 'Status Reason' 'Equals' & click on the lookup icon. The middle column (equals) can be changed depending on the type of query.

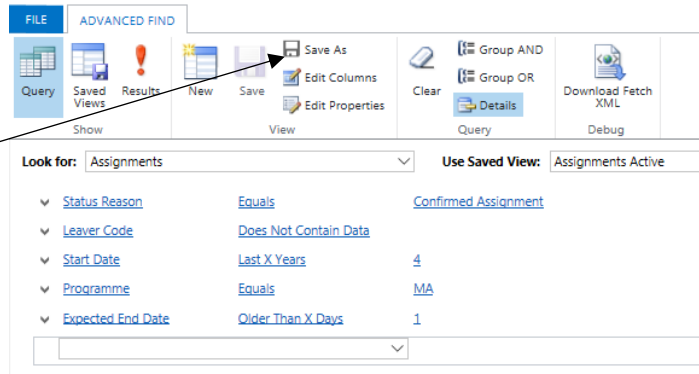
Highlight on the values that you require and click on the arrow buttons to move them in to selected values field. Click OK.



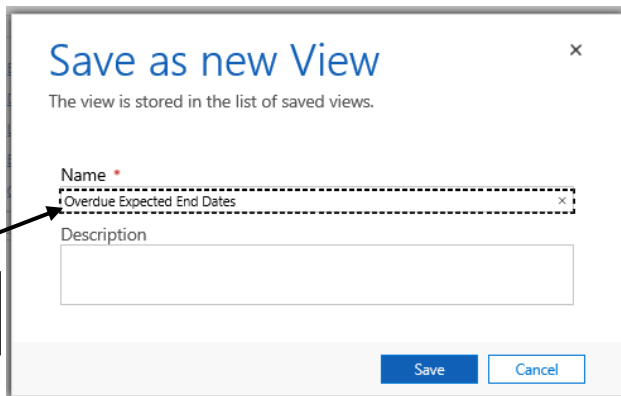
The headers and dropdowns can be modified to build the Advanced Find query by adding different criteria to refine it.



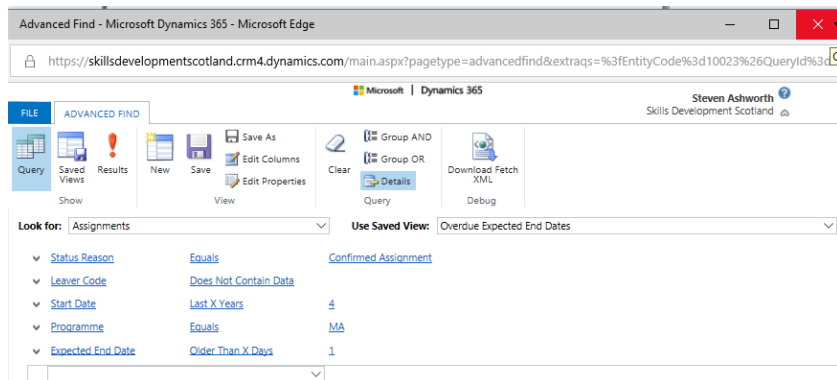
Saving the Personal View



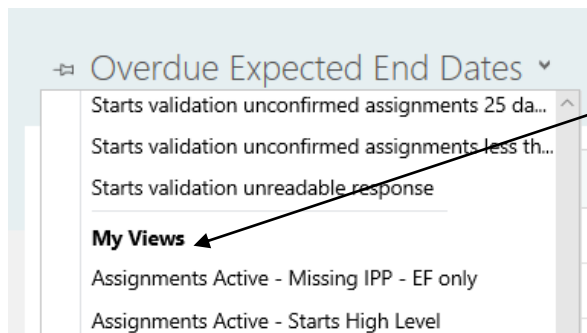
Click on Save As.



Give the query an appropriate name then click Save.

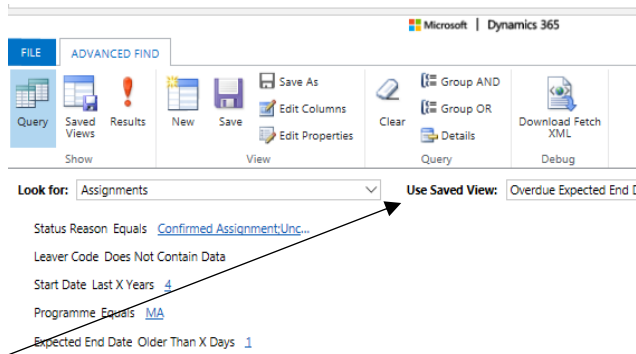


Once saved, the Advanced Find page will still be open. Click the close button.



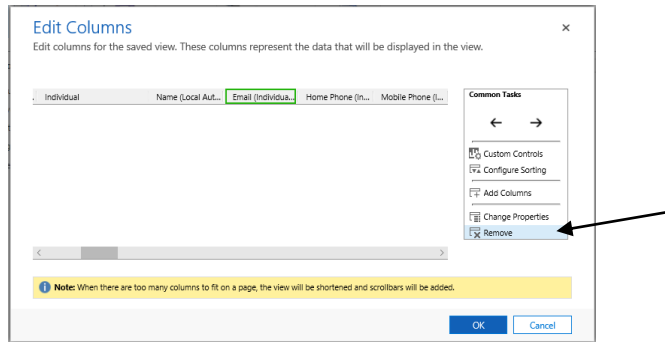
The query that has just been setup will now show under the My Views section within the assignments entity. Note: that is for this example only. The query would show under the relevant entity that the query was created in.

- Editing columns - users may wish to add or remove columns from the report. Click on the Advanced Find button from the View you wish to change:

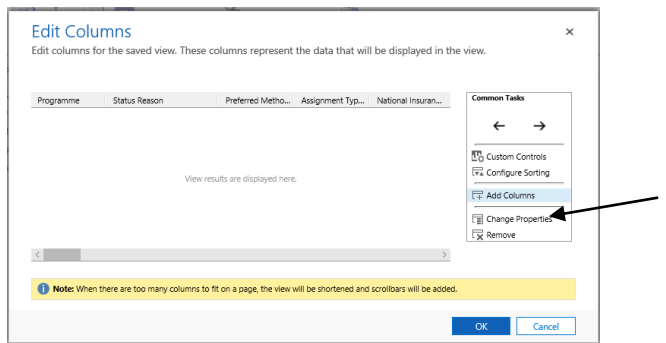


Select the report from the "Use Saved View" dropdown. Click the Edit Columns button.

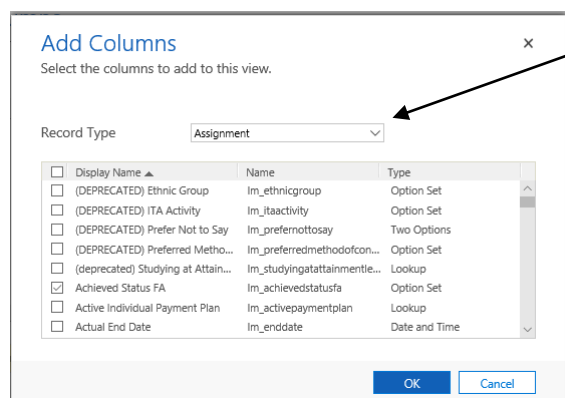
- To remove a column, highlight the column and click the remove button. Repeat this to remove any additional columns, click OK



- To add additional columns to the report, click on the "add columns" function as indicated below.

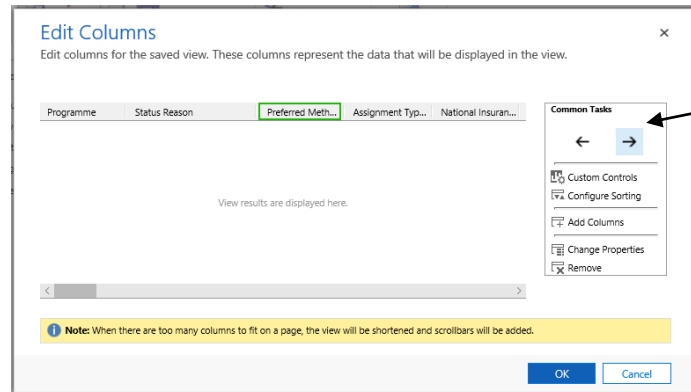


- Search for the column/s that you wish to add and click the tick box to select the required option and click ok. The "Record Type" dropdown can be used to change the entity in FIPS. This will update the list of options available to include different fields from other entities



Click OK again to close box when complete.

6. The order of the columns can be changed by highlighting the column you wish to move and using the Arrow buttons to change the order. This will rearrange the way fields are displayed in the view, e.g. in this example, using the arrows would mean “Status Reason” would show after “Preferred Method of Contact”.



After making any of these changes return to the Advanced Find box and click Save. This will save the report and any changes to the ‘My Views’ section within the relevant entity. Ensure the screen is refreshed to pull through any changes.