

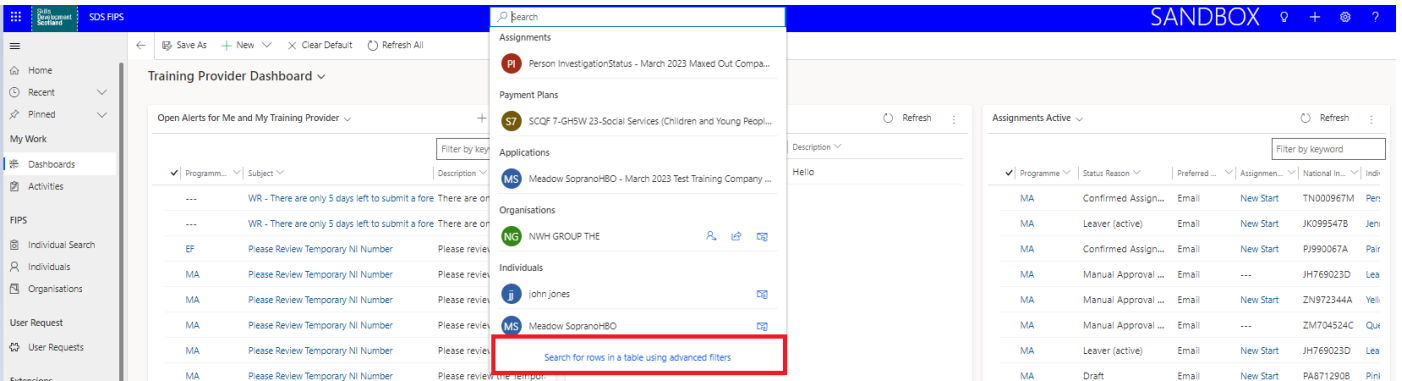
# FIPS QUICK START GUIDE

## How to use Modern Advanced Find

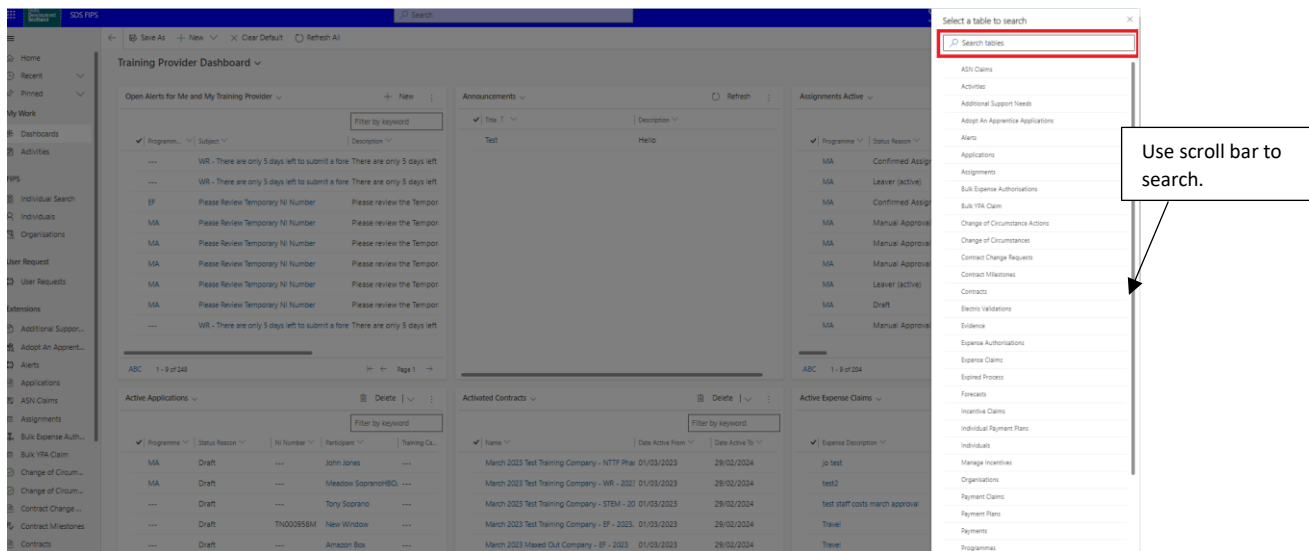
This guide provides basic instructions on how to use the Modern Advanced Find function in FIPS. Modern Advanced Find enables data to be queried and personal views / reports to be created and shared. There are many different configurations and users will need to vary these depending on what data they wish to query or report on. FIPS users can find more information in relation to Modern Advanced Find online as this function is not unique to FIPS and is a standard Microsoft Dynamics feature.

### Creating a Personal View

1. The Advanced Find function can be selected from global search bar in the header of the Training Provider Dashboard (FIPS homepage). When this opens, the relevant entity can be selected, and Providers can report on the information held within that entity / extension e.g., applications / assignments / individuals.



2. When the Advanced Find opens, you can search for the relevant entity/extension using the scroll bar or use "Search table" field to search for the entity if preferred and start to build your report/query.



3. The Advanced Find option can also be selected from within an entity / extension by clicking on the “Edit Filters” button. For the purposes of this guide, an example will be demonstrated of setting up an Advanced Find query that reports on Overdue Expected End Dates for Assignments in FIPS:

Program	Status Reason	Preferred	Assignme...	National L...	Individual	Name (L...)	Home Ph...	Mobil...	Age Group	Age at Training Start	Expected...	Redunda...	Date Leav...	Parent Le...	Leaver Co...	Early Leav...	Occupati...
MA	Confirmed Assi...	Email	New Start	ZN09076...	Ice Skate	Glasgow ...	f.	0741...	20-24	15	01/10/20...					No	Other Ser...
MA	Confirmed Assi...	Email	New Start	JW10235...	Henry Hoover	Glasgow ...	L.		16-19	19	17/10/20...					No	Sport, He...
MA	Confirmed Assi...	Email	Progressi...	JW77788...	Ark House	Glasgow ...	L.		16-19	18	21/01/20...					No	Sport, He...
MA	Confirmed Assi...	Email	New Start	JW12222...	ree bok	Glasgow ...	L.		16-19	17	21/01/20...					No	Sport, He...

4. The report / Advanced Find wizard will be displayed. Click on “Delete all filters” to remove any pre-set query details:

**Edit filters: Assignments**

Reset to default **Delete all filters**

Showing live data [Change to retained data](#)

AND

- Status equals Active
- Mark for Deletion by SDS does not equal Yes
- Mark for Deletion by Tr... does not equal Yes

+ Add

**Edit filters: Assignments**

Reset to default **Delete all filters**

Showing live data [Change to retained data](#)

AND

**Add**

- Add row
- Add group
- Add related entity

Click on 'Add' to add a row, group, or entity.

5. The query can now be built using different filters / look for options. To filter by Status Reason of an assignment e.g., to view Confirmed Assignments only, click on add row. The Status Reason field would need to be added to the query:

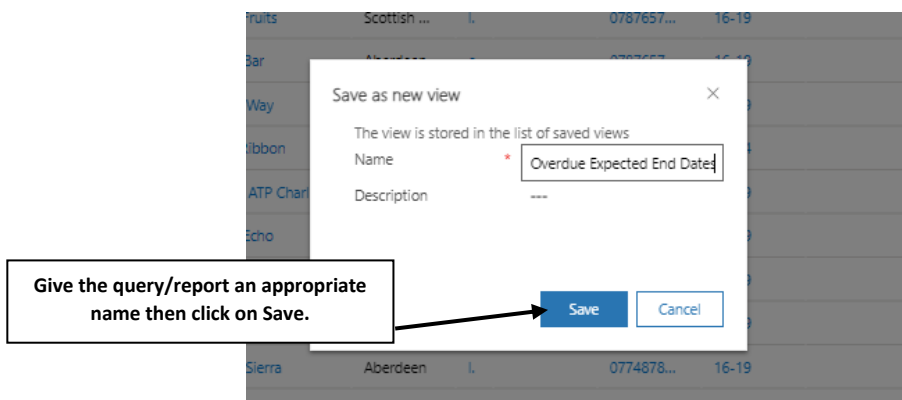
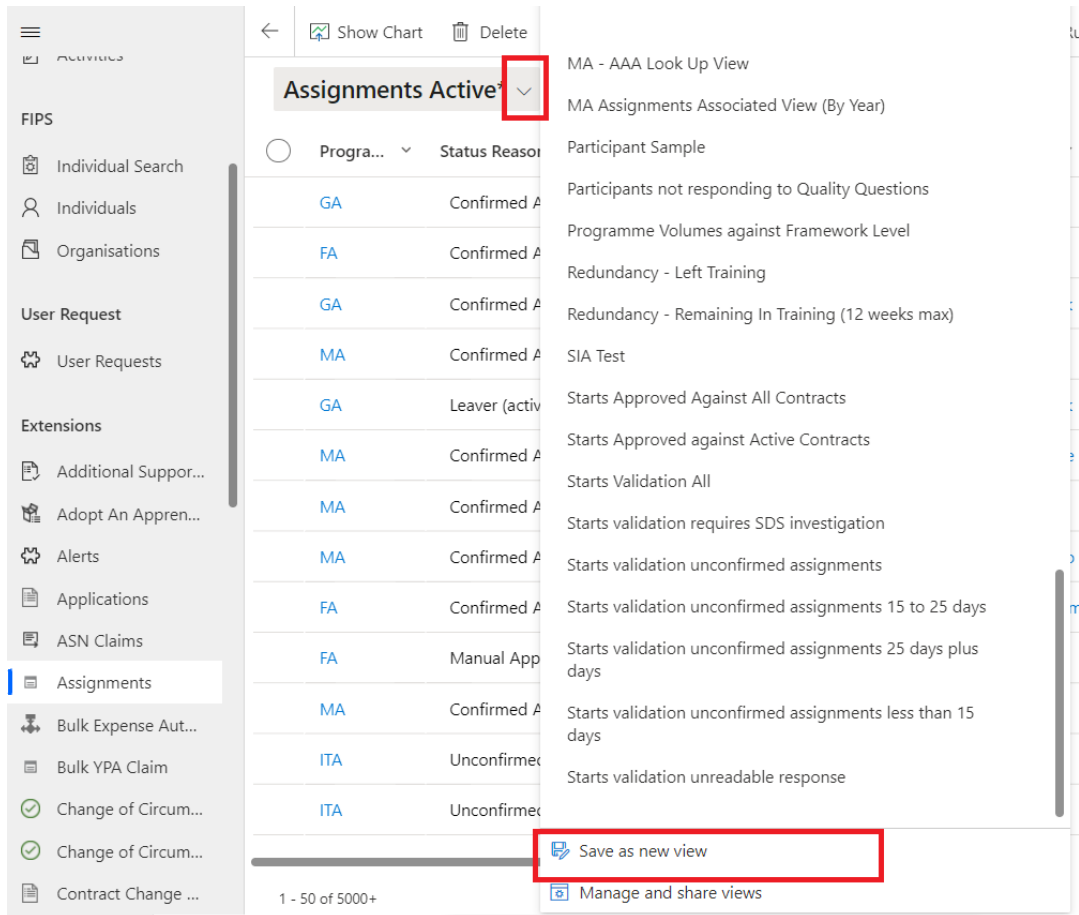
**Note: To search you can use the drop down to scroll/select or, if you know what you are looking for, you can start typing and select instead.**

Select 'Status Reason 'Equals' & click on Value to select Confirmed Assignment. The middle column (equals) can be changed depending on the type of query.

**Click on apply to run query.**

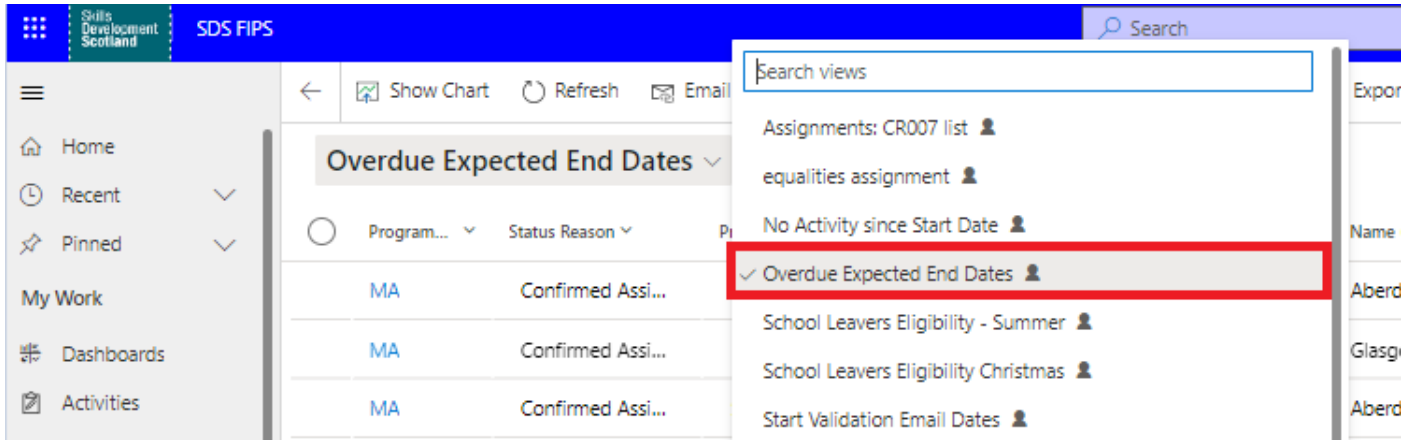
- in this example, Status Reason, Leaver Code, Start Date, Programme and Expected End Date have all be used to filter the results.

The query can be saved as a Personal View within the extension. It can be modified / edited at any point after it has been saved. Click the drop-down arrow within the view and click on "Save as new view":

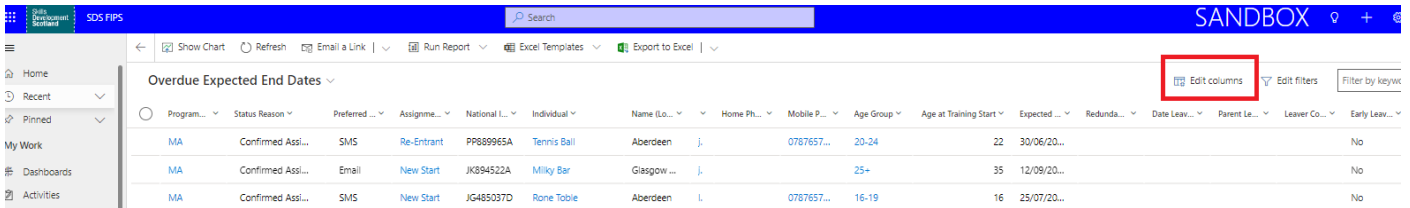


6. To view the query that has been setup, click on the system view name and a dropdown will appear with all system views and your additional saved views will be visible at the top. You can tell these are personal views or views that have been shared with you because they have a person icon next to them.

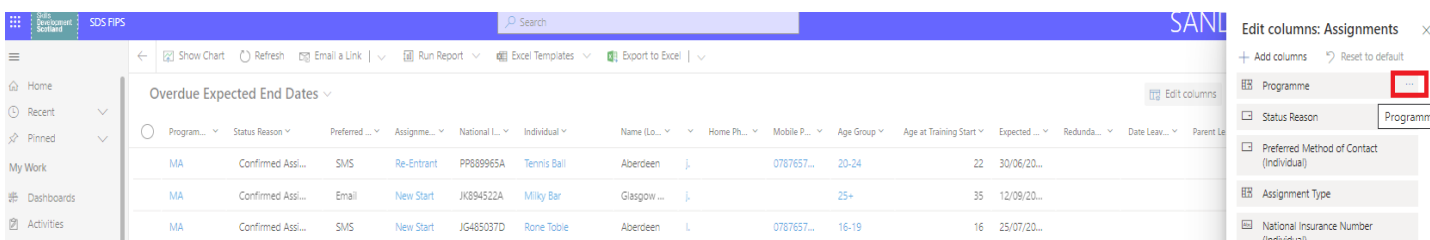
**Note: This is an example only. For any other query / report, the query would show under the relevant entity that it was created in:**



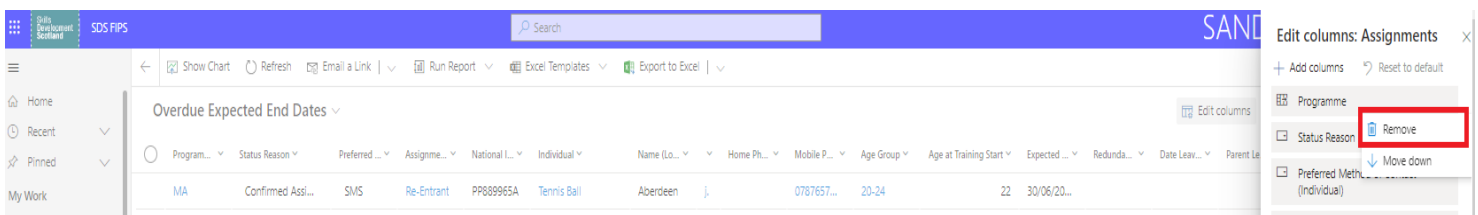
**7. Editing columns - users may wish to add or remove columns from a report. Click on the Edit Columns button from the view you wish to change:**



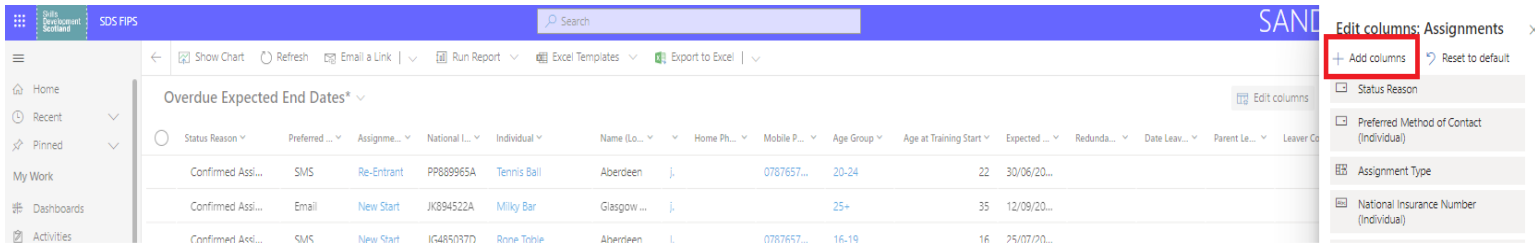
**8. To remove a column, hover over the column you want to remove, and the ellipsis will appear:**



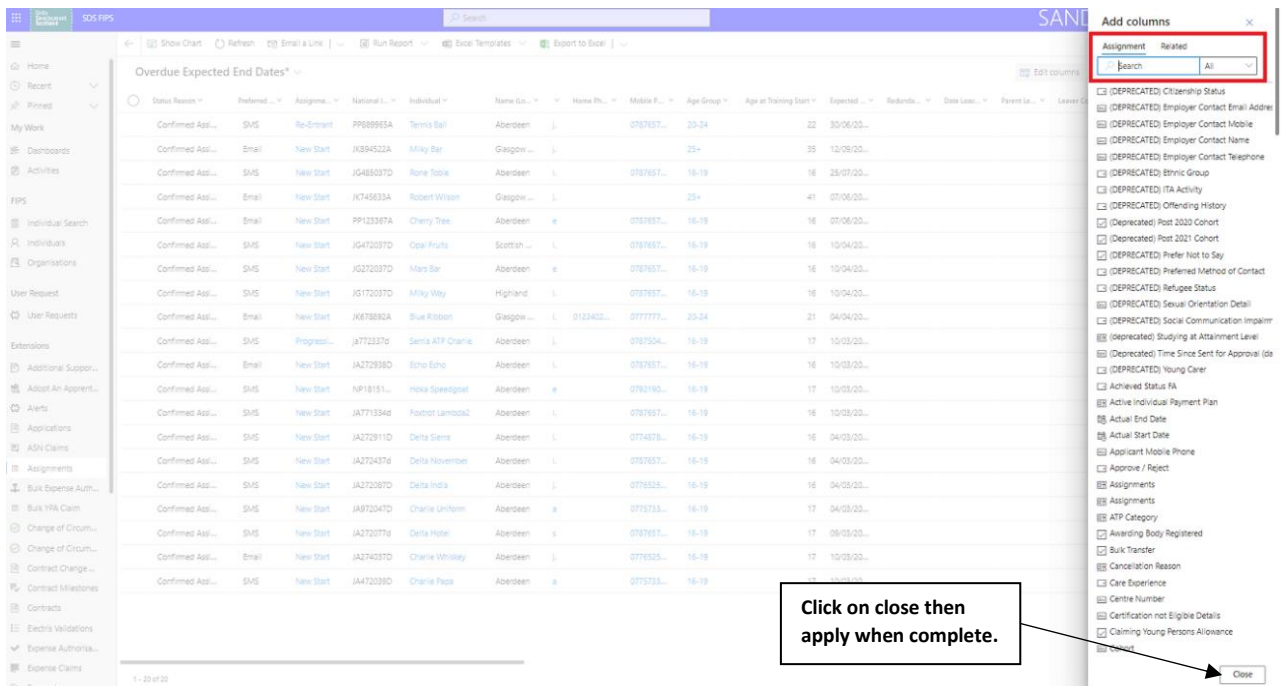
**9. Click the remove button. Repeat this to remove any additional columns and click Apply:**



**10. To add additional columns to the report, click on the “Add columns” button:**

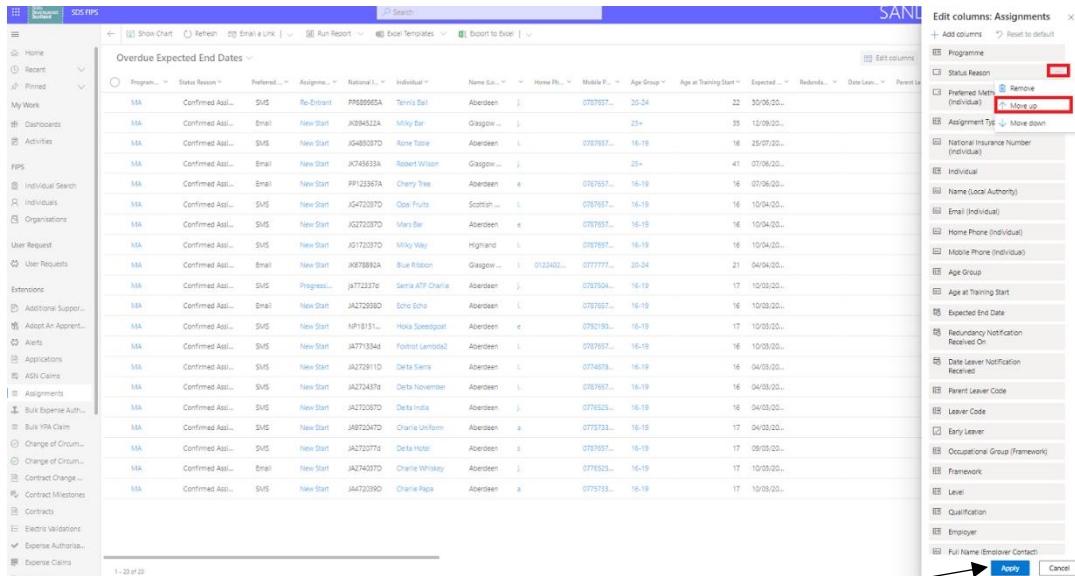


**11. Search for the column/s that you wish to add either by using the scroll bar or if you know the column name you require, you can enter this in the search box and click that option to select. The “Related tab” can be used to view any fields held within a different entity in FIPS. This will update the list of options available to include different fields:**



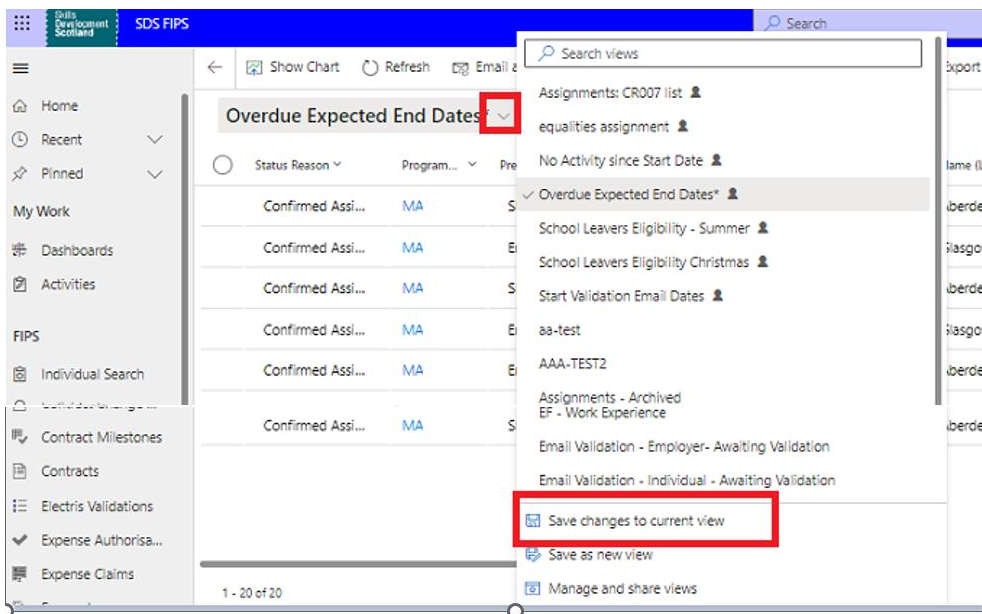
- For example, if creating a report in the Assignments entity but some of the information required is listed only within the Individuals entity (e.g., Participant SCN), the Related tab can be changed to look at Individuals. The fields for the Individual entity will then be displayed and the relevant field (e.g., SCN number) can be selected from the options which will add that field into the view.

12. The order of the columns can be changed, you can drag and drop, or you can click the ellipsis next to the column name then 'Move up' or 'Move down'. This will rearrange the way fields are displayed in the personal view. In this example, using 'Move up' "Status Reason" would then show before "Programme":



When complete click on Apply.

- After making any of these changes you will need to save the changes. To do this click on apply to return to the view. Click on the drop-down arrow next to the view name and click save changes to current view. This will save the report and any changes made to the 'My Views' section within the relevant entity:

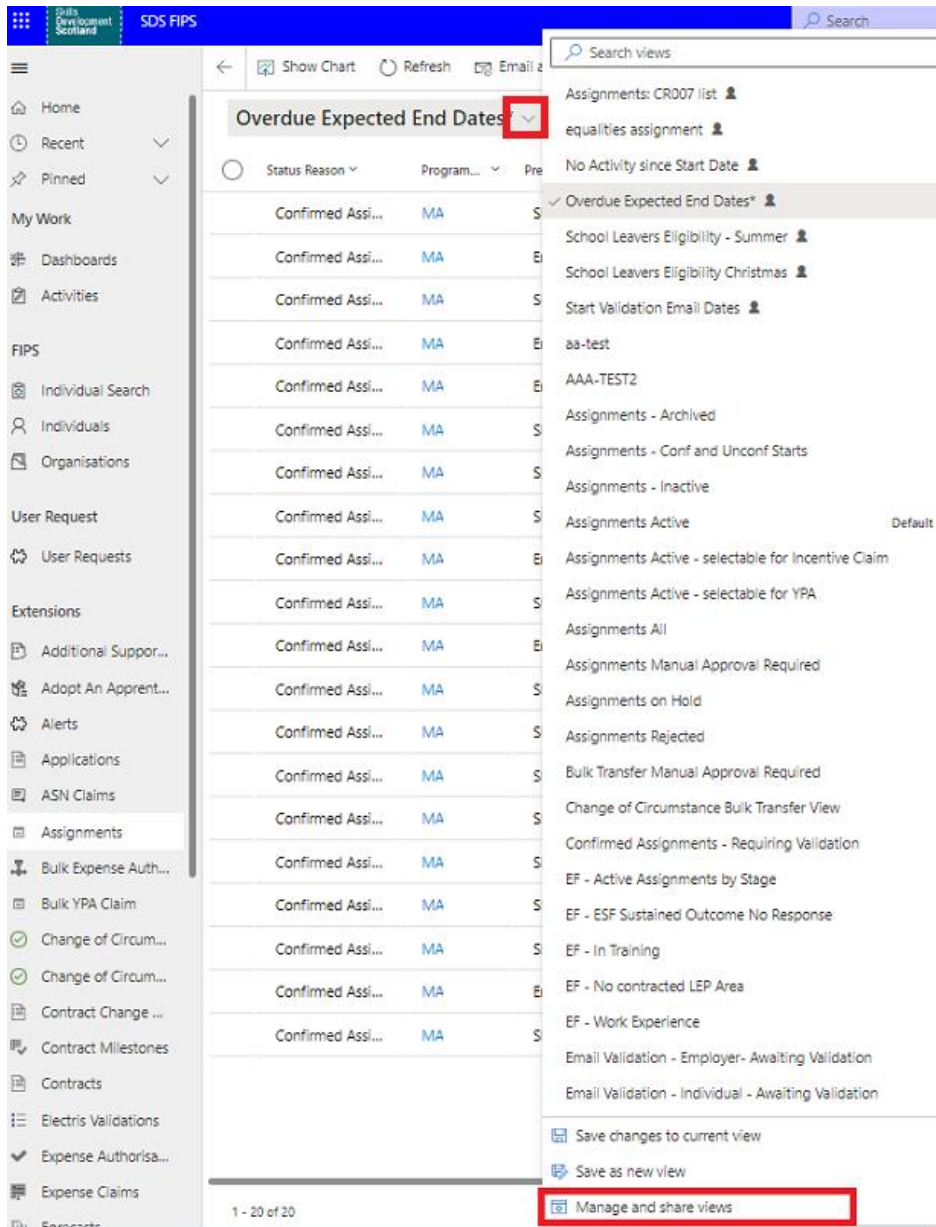


Ensure the screen is refreshed to pull through any changes to the query.

## Sharing Views

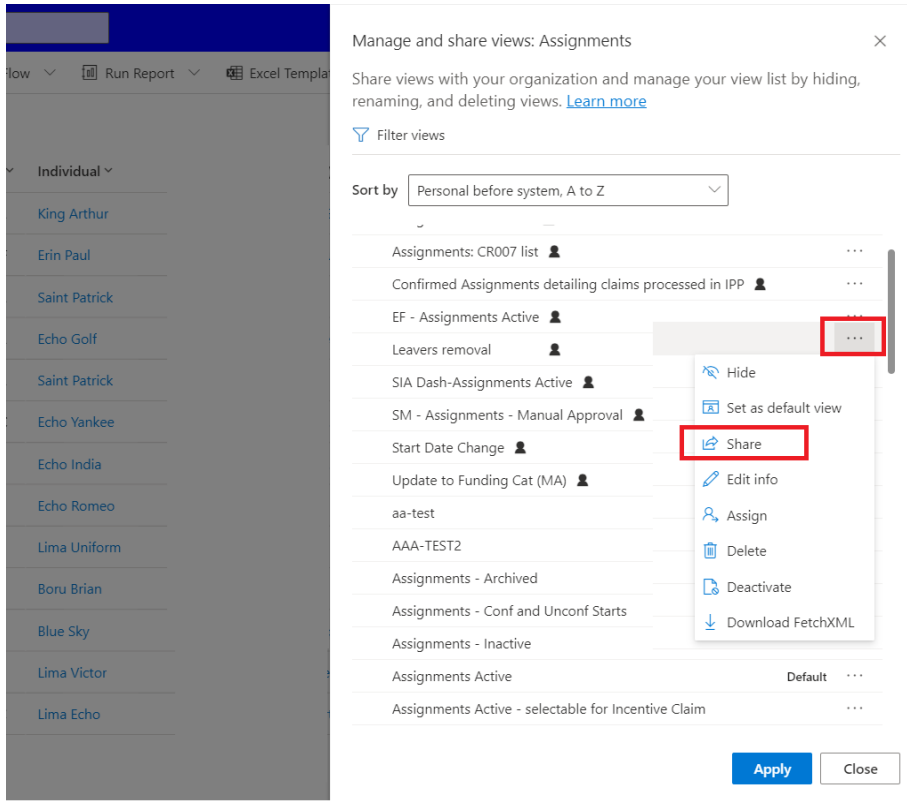
Any personal views created in FIPS can be shared with other FIPS users. This will mean they have access to the query / report and depending on access granted, they can edit / modify / share the view. The data within a view (e.g., participant information) will not be displayed if the user does not have access to view that specific data. The report will pull through blank depending on the user's permissions.

1. Click the drop down arrow next to the view you want to share and click on manage and share views:

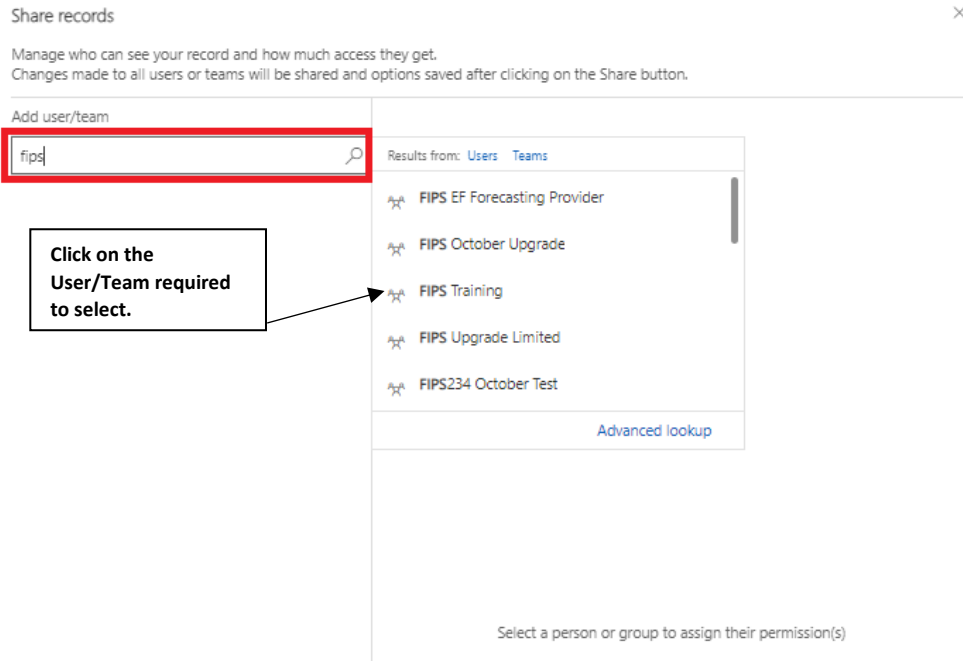




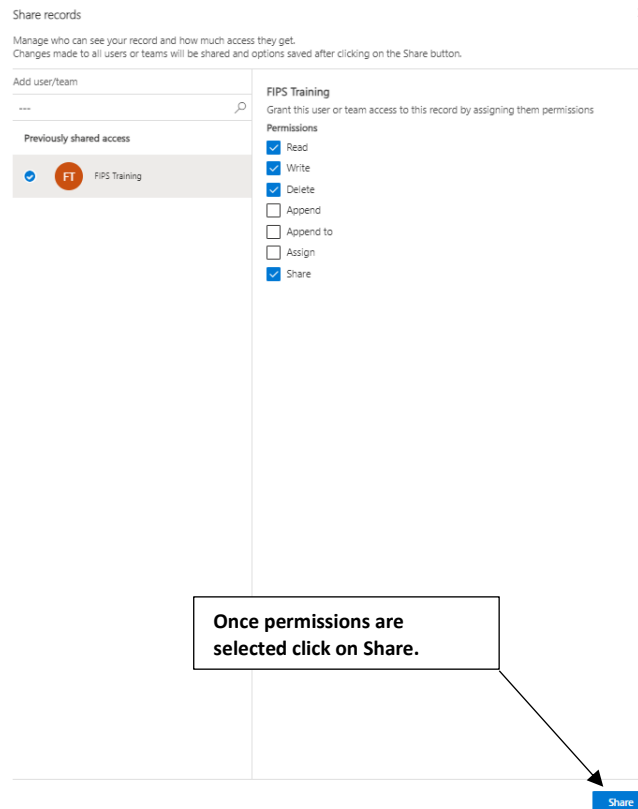
2. Click on the ellipsis next to the view that you want to share and click on Share:



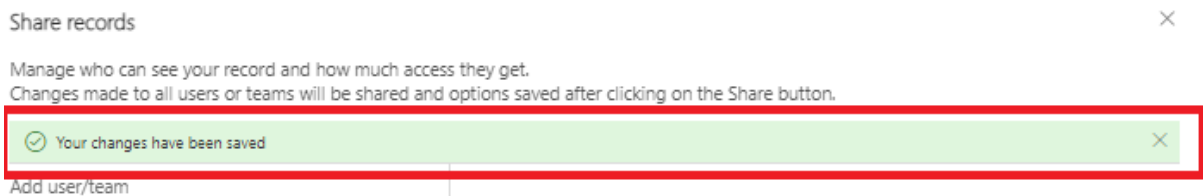
3. Use the look up to search for a User / Team you want to share the view with, in this example FIPS Training will be used:



- Under Manage share access click on the User/Team to add permissions. Permissions can be given to the users / teams selected. Use the tick boxes to delegate access rights. It is recommended to give Read and Share which will enable the users to use the view and share it with others:



- in this example, FIPS Training has also been given delete access, which means that users will be able to delete the entire query.
- Click Share at the bottom of the page to share the view with the selected users. A banner will appear to advise that the changes have been saved.



- The view will now be visible by the users it was shared with within the relevant entity in FIPS.