

Tips for using Advanced Filter

Advanced Filter is a handy tool to search for proposals outside your scope as an originator.

If you are searching for a proposal other than yours, be sure that you start on the “All Proposals” tab.

***When you are finished using the Advanced Filter function, be sure to click on “Cancel” to make it disappear.**

The screenshot shows the 'Proposals' section of a web application. At the top, there are tabs for 'Proposals', 'Agendas', 'Accounts', and 'Reports'. Below these are buttons for 'My Tasks', 'My Proposals', 'Watch List', and 'All Proposals'. The 'All Proposals' button is highlighted with a red arrow. The main area is titled 'Filter by:' and contains a dropdown menu set to 'All Proposals' and a link to 'Advanced Filter'. A '+ New Proposal' button is in the top right. The filter section includes a 'Keyword' field (6), a 'Found Under' dropdown (1) set to 'All Entities', a 'Date Search Scope' dropdown (5) set to 'Select a date type', and 'From' and 'To' date input fields with a 'Clear Dates' button. Below these are checkboxes for 'Include all child entities under my selection'. The 'Process Type' dropdown (2) is set to 'All Processes', and the 'Current Step Name' dropdown (4) is set to 'All Current Steps'. The 'My Role' dropdown (3) is set to 'All My Roles'. The 'Proposal Status' section has checkboxes for 'Unlaunched (you are originator)', 'Reviewing (you are originator)', 'Active', 'Held', 'Suspended', 'Cancelled', 'Waiting', and 'Completed'. At the bottom are 'Filter Proposals' and 'Cancel' buttons.

1. **Found Under:** The default is “All Entities,” or you can select a specific college or department.
2. **Process Type:** The default is “All Processes,” or you can filter by program or course.
3. **My Role:** The default is “All My Roles”. If you are on a committee, for example, you can filter by committee role. **If you are searching for a proposal other than yours, just leave it at default setting.**
4. **Current Step Name:** This is a great function for committees in particular. You can select the committee step to determine if a proposal has made it to that level in the approval process.
5. **Date Search Scope:** Determine what proposals have been **launched** or **completed** within a specific date range.
6. **Keyword:** The Keyword field will bring results back only for **keywords found in the title**. It *does not* reflect keywords within the form itself.