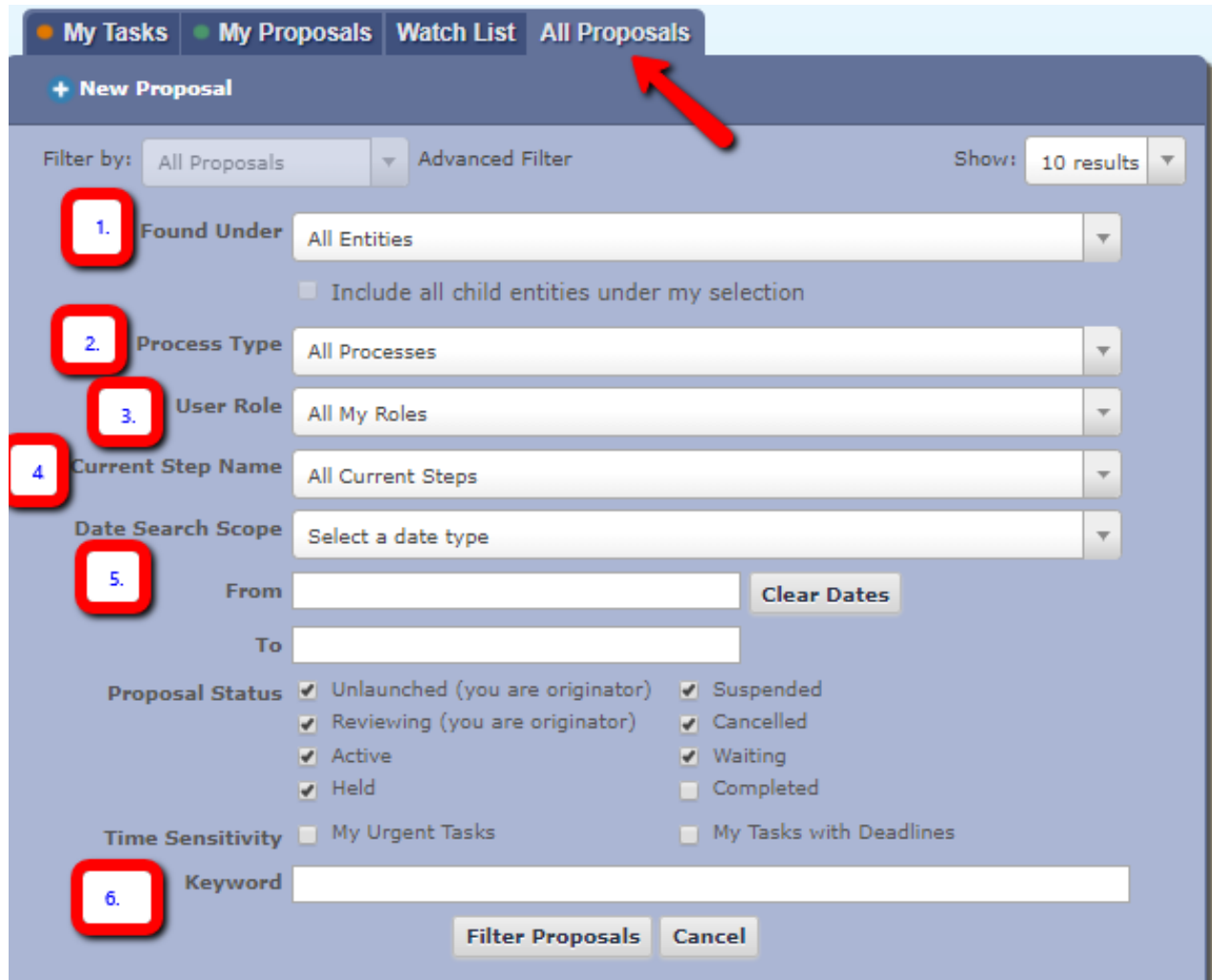


Tips for using Advanced Filter

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 'Advanced Filter' interface. At the top, there are tabs for 'My Tasks', 'My Proposals', 'Watch List', and 'All Proposals'. A red arrow points to the 'All Proposals' tab. Below the tabs, there is a '+ New Proposal' button. The main area is titled 'Filter by: All Proposals' and 'Advanced Filter'. On the right, it says 'Show: 10 results'. The filter options are:

- 1. Found Under: All Entities (dropdown)
- 2. Process Type: All Processes (dropdown)
- 3. User Role: All My Roles (dropdown)
- 4. Current Step Name: All Current Steps (dropdown)
- 5. Date Search Scope: Select a date type (dropdown)
- From: [text input] Clear Dates
- To: [text input]
- Proposal Status: Unlaunched (you are originator) Suspended
 Reviewing (you are originator) Cancelled
 Active Waiting
 Held Completed
- Time Sensitivity: My Urgent Tasks My Tasks with Deadlines
- 6. Keyword: [text input]

At the bottom, there are two buttons: 'Filter Proposals' and 'Cancel'.

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. **User 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.