

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, **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 sub-tabs: 'My Tasks', 'My Proposals', 'Watch List', and 'All Proposals'. A red arrow points to the 'All Proposals' tab. The main area is titled 'Filter by:' and contains a dropdown menu set to 'All Proposals' and a button for 'Advanced Filter'. A '+ New Proposal' button is in the top right. The filter options are:

- Keyword:** A text input field with a red callout '6.' pointing to it.
- Found Under:** A dropdown menu set to 'All Entities' with a red callout '1.' pointing to it.
- Date Search Scope:** A dropdown menu set to 'Select a date type' with a red callout '5.' pointing to it. It includes 'From' and 'To' date input fields and a 'Clear Dates' button.
- Process Type:** A dropdown menu set to 'All Processes' with a red callout '2.' pointing to it.
- Current Step Name:** A dropdown menu set to 'All Current Steps' with a red callout '4.' pointing to it.
- My Role:** A dropdown menu set to 'All My Roles' with a red callout '3.' pointing to it.
- Proposal Status:** A list of checkboxes: Unlaunched (you are originator), Reviewing (you are originator), Active, Held, Suspended, Cancelled, Waiting, and Completed. The first four are checked.
- Time Sensitivity:** Two checkboxes: 'My Urgent Tasks' and 'My Tasks with Deadlines', both unchecked.

At the bottom, there 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.