

INDIVIDUAL CASE MANAGEMENT SYSTEM (ICM)

Advanced Find and
Dashboard Features



DATA



KNOWLEDGE



ACTION

ACCESSING ADVANCED FIND...

ADVANCED FIND

FEATURES

- The Advanced Find is used for pulling data from the ICM
- Information can be filtered to specific data points
- Allows users to create 'views' or 'lists' of data that can be saved and used on dashboards

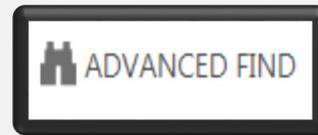
ACCESS

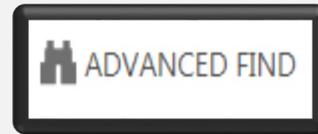
To access Advanced Find select:

- I. Advanced Find icon on the right side of the Navigation Bar.



OR

- I.  option in navigation sub-bar



EXAMPLE

The image shows the header of the ICM application. It is divided into two horizontal sections. The top section is dark blue and contains the ICM logo on the left, a hamburger menu icon, and navigation links for 'My Workplace' and 'Cases'. On the right side of this section, there are icons for a clock and a plus sign, a search bar with the text 'Search CRM data', and a user profile section for 'Shane Bannarbie' with the role 'ICMPROD'. The bottom section is white and contains a row of action buttons: '+ NEW', 'EMAIL A LINK', 'RUN REPORT', 'EXPORT TO EXCEL', 'FILTER', 'ADVANCED FIND', 'HELP', 'ICM INTRO', and another 'FILTER' button. Two black arrows with orange glow effects point to the 'ADVANCED FIND' button in the bottom section and the user profile in the top section.

ICM

My Workplace

Cases

Search CRM data

Shane Bannarbie
ICMPROD

+ NEW

EMAIL A LINK

RUN REPORT

EXPORT TO EXCEL

FILTER

ADVANCED FIND

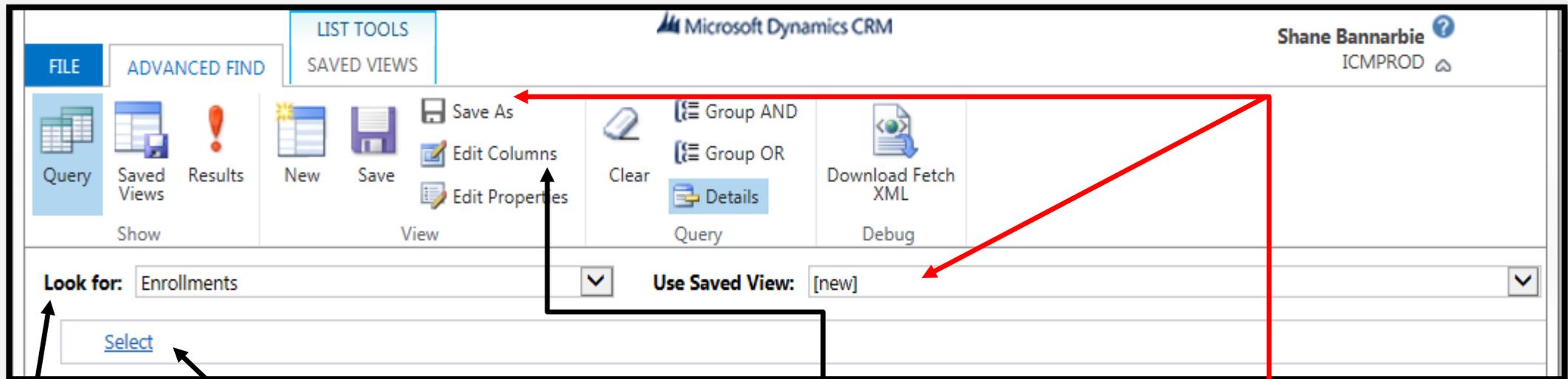
HELP

ICM INTRO

FILTER

ADVANCED FIND FORM

Once the Advance Find window opens the below view will appear.



Step 1

Use “**Look for**” to set your search parameters. Always select “Enrollment” as parameters

Step 2

Use the “**Select**” link to filter specific points of information within parameter

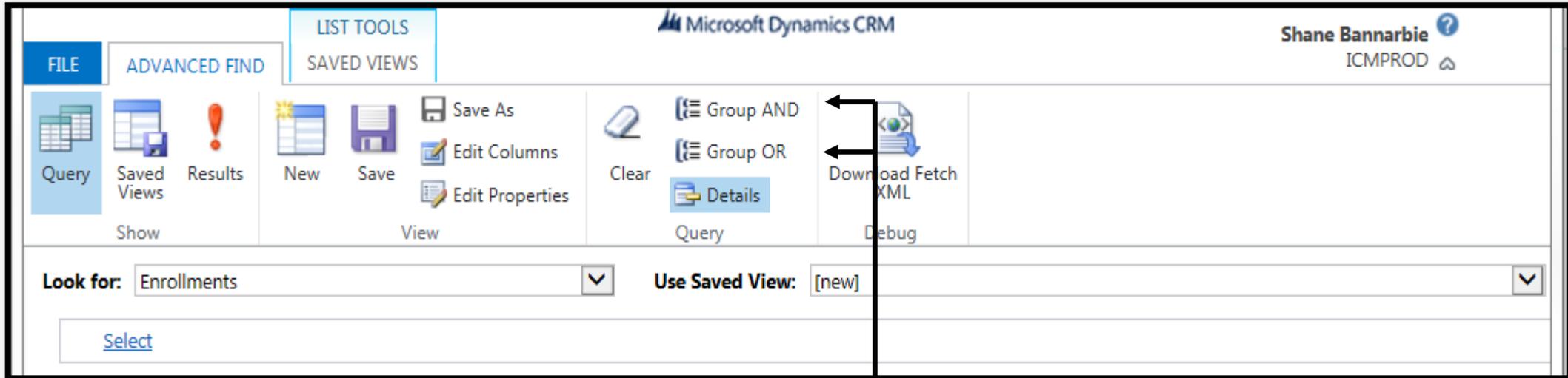
Step 3

Format your report table at “**Edit Columns**”. This allows you to customize the layout of information filtered and provides a sub layer of filtering secondary to step 2

Step 4

Save your queries. Saved queries in ‘Saved Views’

GROUP AND GROUP OR



“Group AND” or “Group OR” allows the query to narrow down the results of the search criteria.

Group **AND** makes it so that both criteria must be present

- Example: Criteria X and Y will appear

Group **OR** makes it so either criteria will be present or both

- Example: Criteria X or Y whichever is present or both if both are present, both X and Y will appear

SCENARIO

You are asked to provide an account of the following participants :

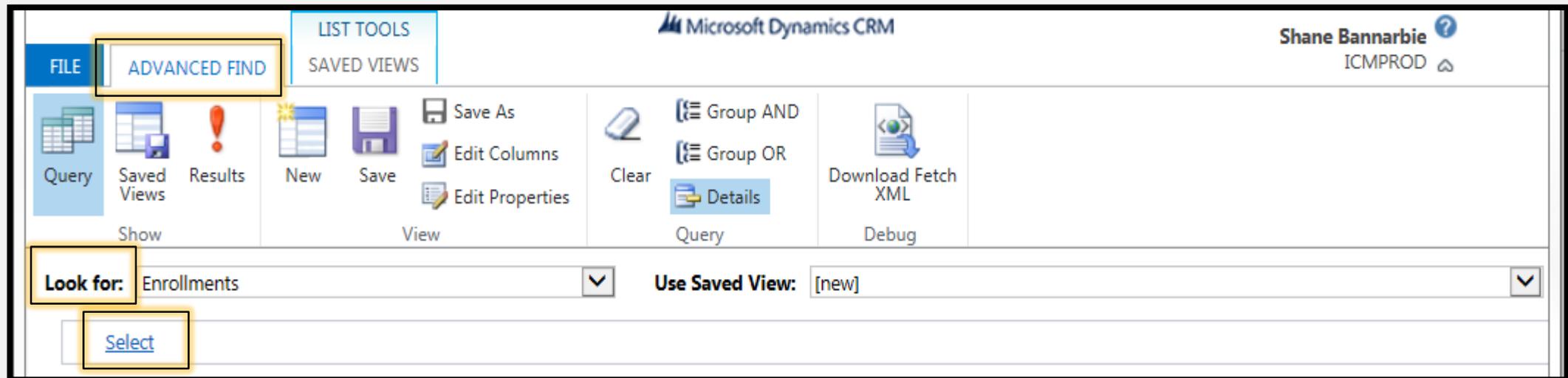
What: **Enrollments in enrolled status**

Who: **In high school or less**

And are: **Male**

TO BUILD A QUERY - BASICS

- Step 1: Click **Advanced Find** Icon
- Step 2: Determine the scope (**Look for**)
- Step 3: Select **Enrollments** as parameters
- Step 4: **Select** criteria within parameters



The screenshot displays the Microsoft Dynamics CRM interface for building a query. The top navigation bar includes the 'FILE' menu, 'ADVANCED FIND' (highlighted with a yellow box), 'LIST TOOLS', and 'SAVED VIEWS'. The user's name 'Shane Bannarbie' and environment 'ICMPROD' are visible in the top right corner. The main toolbar contains various icons for 'Query', 'Saved Views', 'Results', 'New', 'Save', 'Save As', 'Edit Columns', 'Edit Properties', 'Clear', 'Group AND', 'Group OR', 'Details', and 'Download Fetch XML'. Below the toolbar, the 'Look for:' dropdown menu is set to 'Enrollments' (highlighted with a yellow box), and the 'Use Saved View:' dropdown menu is set to '[new]'. A 'Select' button (highlighted with a yellow box) is located at the bottom left of the interface.

CRITERIA OPTIONS

The screenshot shows the Microsoft Dynamics CRM Advanced Find interface. The window title is "Advanced Find - Microsoft Dynamics CRM - Cases My Cases - Microsoft Dynamics CRM". The user is identified as "Shane Bannarbie" with the role "ICMPROD". The interface includes a ribbon with tabs for "FILE", "ADVANCED FIND", "LIST TOOLS", and "SAVED VIEWS". The "ADVANCED FIND" tab is active, showing options like "Query", "Saved Views", "Results", "New", "Save", "Save As", "Edit Columns", "Edit Properties", "Clear", "Group AND", "Group OR", "Details", and "Download Fetch XML". Below the ribbon, there are dropdown menus for "Look for:" (set to "Enrollments") and "Use Saved View:" (set to "[new]"). A list of criteria options is displayed, with "Status Reason" highlighted by a black arrow. The list includes: Single Parent, Skills/Experience, Social Security Administration, Social Security Number*, Special Reminders?, Speech and Language Disabilities, SS Benefit/Work Incentive Provided by, SS benefits/Work Incentives planning, SSI/SSDI, SSN, SSN Not Provided, State, Status, Status Reason, STEP - Eligibility Code, Success Story, Support through WIOA, Support Through WIOA Narrative, Support through WIOA text box, TAP Workshop in 3 Prior Years, Target Occupation, Teamwork, Temporary Assistance to Needy Families (TANF), Ticketholder Follow-up, Ticketholder Follow-up - Text, Total Service Cost, Total Service Cost (Base), Training, Training narrative, and Training Related Placement. The zoom level is set to 115%.

Look for: Enrollments Use Saved View: [new]

Single Parent
Skills/Experience
Social Security Administration
Social Security Number*
Special Reminders?
Speech and Language Disabilities
SS Benefit/Work Incentive Provided by
SS benefits/Work Incentives planning
SSI/SSDI
SSN
SSN Not Provided
State
Status
Status Reason
STEP - Eligibility Code
Success Story
Support through WIOA
Support Through WIOA Narrative
Support through WIOA text box
TAP Workshop in 3 Prior Years
Target Occupation
Teamwork
Temporary Assistance to Needy Families (TANF)
Ticketholder Follow-up
Ticketholder Follow-up - Text
Total Service Cost
Total Service Cost (Base)
Training
Training narrative
Training Related Placement

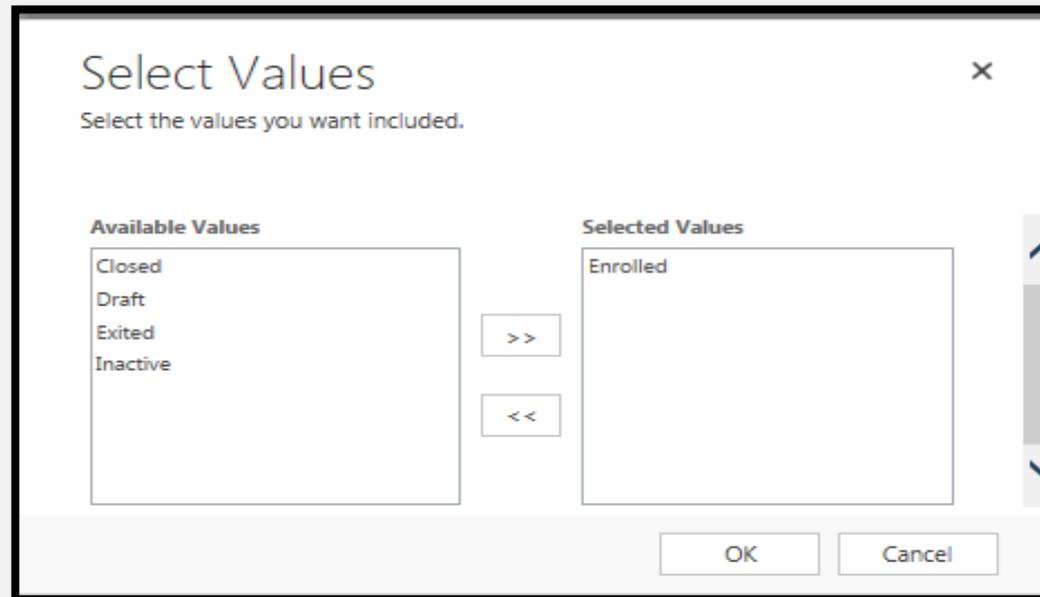
115%

The scenario asked for “participants in enrolled status”. To identify participant status you must use Status Reason criteria and filter to your desired data point.

TO BUILD A QUERY - BASICS (CONT.)

Step 5: Selection Criteria (Select)

- Drop down box narrows down the criteria
- Status Reason → Equals → Enrolled



Advanced Find - Microsoft Dynamics CRM - Cases My Cases - Microsoft Dynamics CRM

Microsoft Dynamics CRM Shane Bannarbie ICMPROD

FILE ADVANCED FIND LIST TOOLS SAVED VIEWS

Query Saved Views Results New Save Save As Edit Columns Edit Properties Clear Group AND Group OR Details Download Fetch XML Debug

Look for: Enrollments Use Saved View: [new]

Status Reason Equals Enrolled

- Retention/Post Employment Support
- Risk Due to Economy Downturn
- Runaway
- School
- School District
- School Dropout
- School Status at Exit
- School Status at Participation
- Secondary Phone
- Section 8/Subsidized Housing
- Selective Service
- Self Employment
- Self-Sufficient
- Senior Community Service Employment Program
- Service Animal
- SGA or more
- Short Term Exp Relative
- Short Term Explain
- Short-term Employment Goal
- Short-term Employment Goal Expected Earning
- Significant Barrier to Employment
- Single Parent
- Skills/Experience
- Social Security Administration
- Social Security Number*
- Special Reminders?
- Speech and Language Disabilities
- SS Benefit/Work Incentive Provided by
- SS benefits/Work Incentives planning
- SSI/SSDI

115%

CRITERIA OPTIONS



The scenario asked for “participants in high school or less”. To identify participant in high school or less you must use their “school status at Participation” criteria and filter to your desired data point.

TO BUILD A QUERY - BASICS (CONT.)

Step 6: Selection Criteria (Select)

- Drop down box narrows down the criteria
- School Status at Participation → Equals → “In-School, Secondary or Less”

The screenshot shows a dialog box titled "Select Values" with a close button (X) in the top right corner. Below the title is the instruction "Select the values you want included." The dialog is divided into two main sections: "Available Values" on the left and "Selected Values" on the right. The "Available Values" list contains five items: "In-School, Alternative School", "In-School, Post-Secondary School", "Not Attending School or Secondary S", "Not Attending School; Secondary Sch", and "Not Attending School; Within Age of". The "Selected Values" list contains one item: "In-School, Secondary or Less". Between the two lists are two buttons: ">>" and "<<". At the bottom of the dialog are two buttons: "OK" and "Cancel".

Advanced Find - Microsoft Dynamics CRM - Cases My Cases - Microsoft Dynamics CRM

Microsoft Dynamics CRM Shane Bannarbie ICMPROD

FILE ADVANCED FIND LIST TOOLS SAVED VIEWS

Query Saved Views Results New Save Save As Edit Columns Edit Properties Clear Group AND Group OR Details Download Fetch XML Debug

Look for: Enrollments Use Saved View: [new]

▼ Status Reason Equals Enrolled

▼ School Status at Participation Equals In-School, Secondary or Less

- Exit Date
- Ex-Offender
- Family Size
- Farmworker Status
- Financial Capability Planning
- Financial Capability Planning text box
- First Name
- Force Save Toggle
- Foster Care
- Frequent Breaks
- Full Name
- Gender
- Group Size
- Has Limited English Language
- High School Student
- Highest Ed Level Completed at Entry
- Highest Educational Level Completed
- Hispanic / Latino
- Homeless
- House/Senate District
- IEP plan
- Import Sequence Number
- Incarcerated at Program Entry
- Incarcerated Parent
- Indian and Native American Programs
- Individual Employment Plan (IEP) Attached
- Individual W/Disability Type Customized Emp Svce
- Individual With A Disability
- Individual With A Disability Financial Capability
- Individual With A Disability IEP Participant

115%

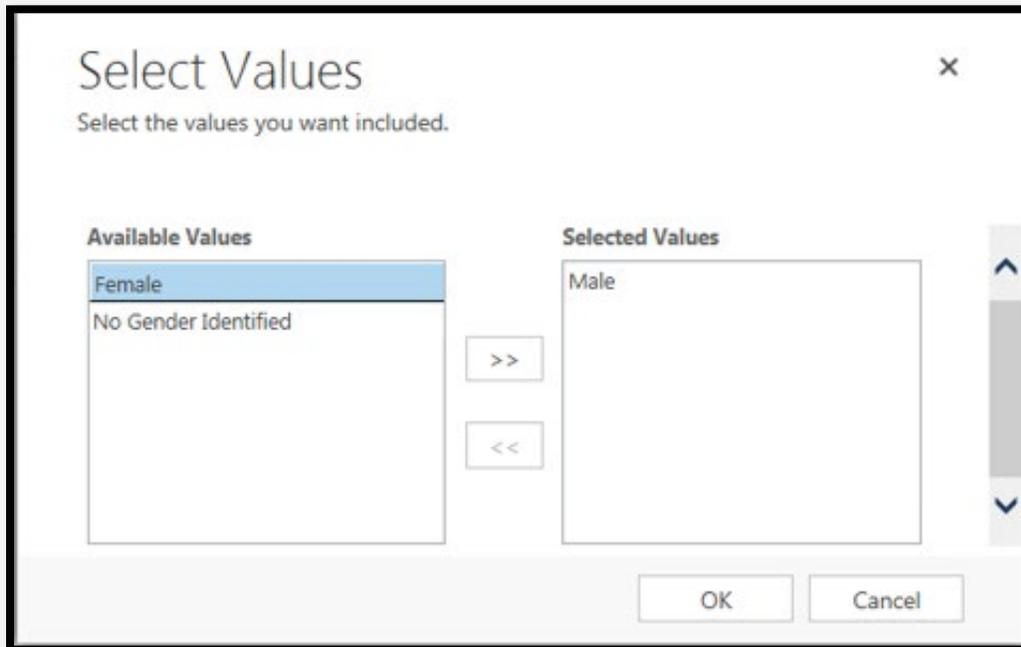
CRITERIA OPTIONS

The scenario asked for “Gender”. To identify participant gender you must use their “Gender” criteria and filter to your desired data point.

TO BUILD A QUERY - BASICS (CONT.)

Step 7: Selection Criteria (Select)

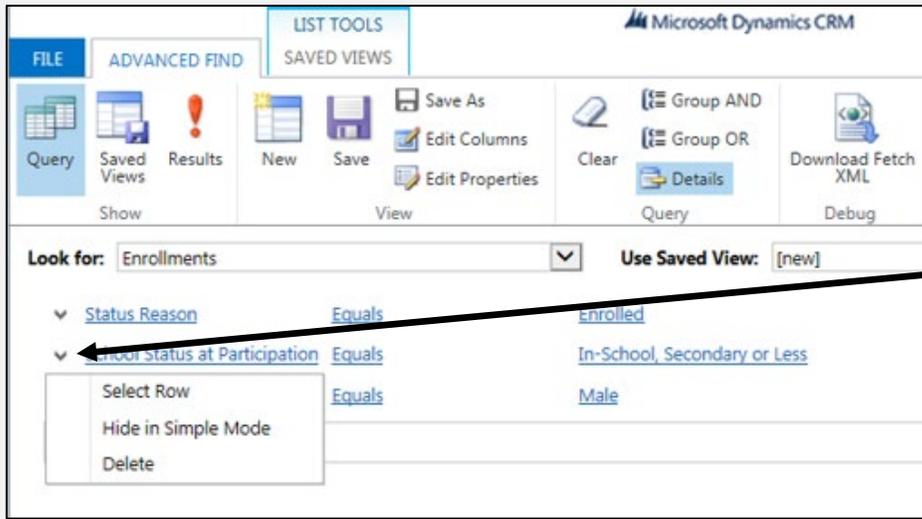
- Drop down box narrows down the criteria
- Gender → Equals → “Male”



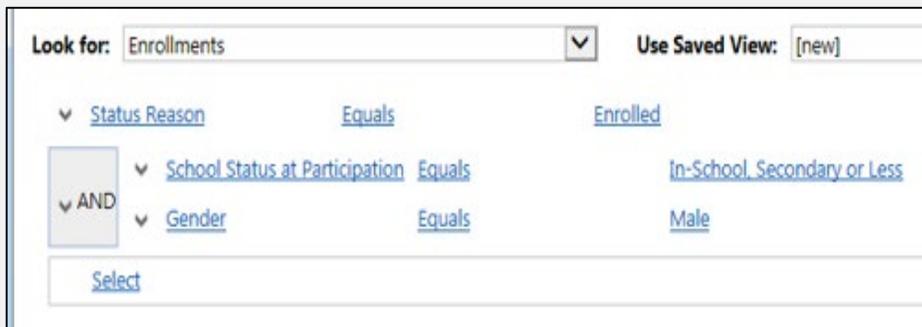
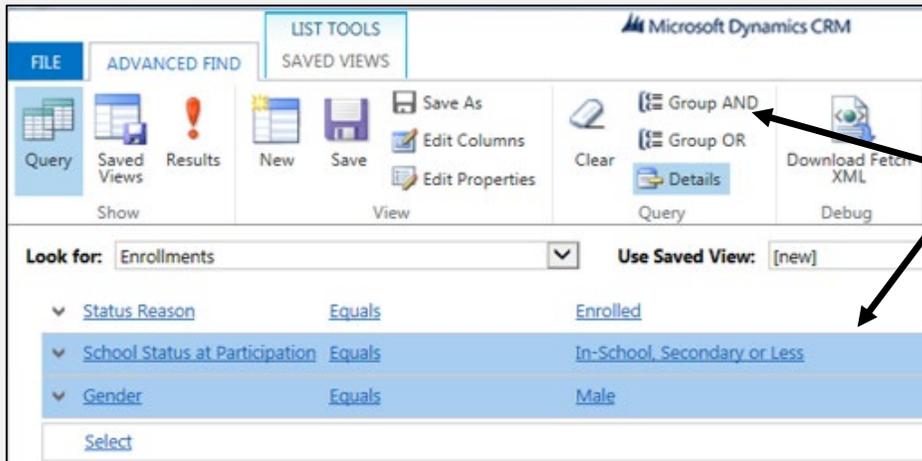
GROUPING CRITERIA

The scenario asked for participants who are “In-School AND are male. The grouping function “ Group AND” can be used to set this parameter

Identify criteria for grouping with “ select row” from the criteria dropdown: 



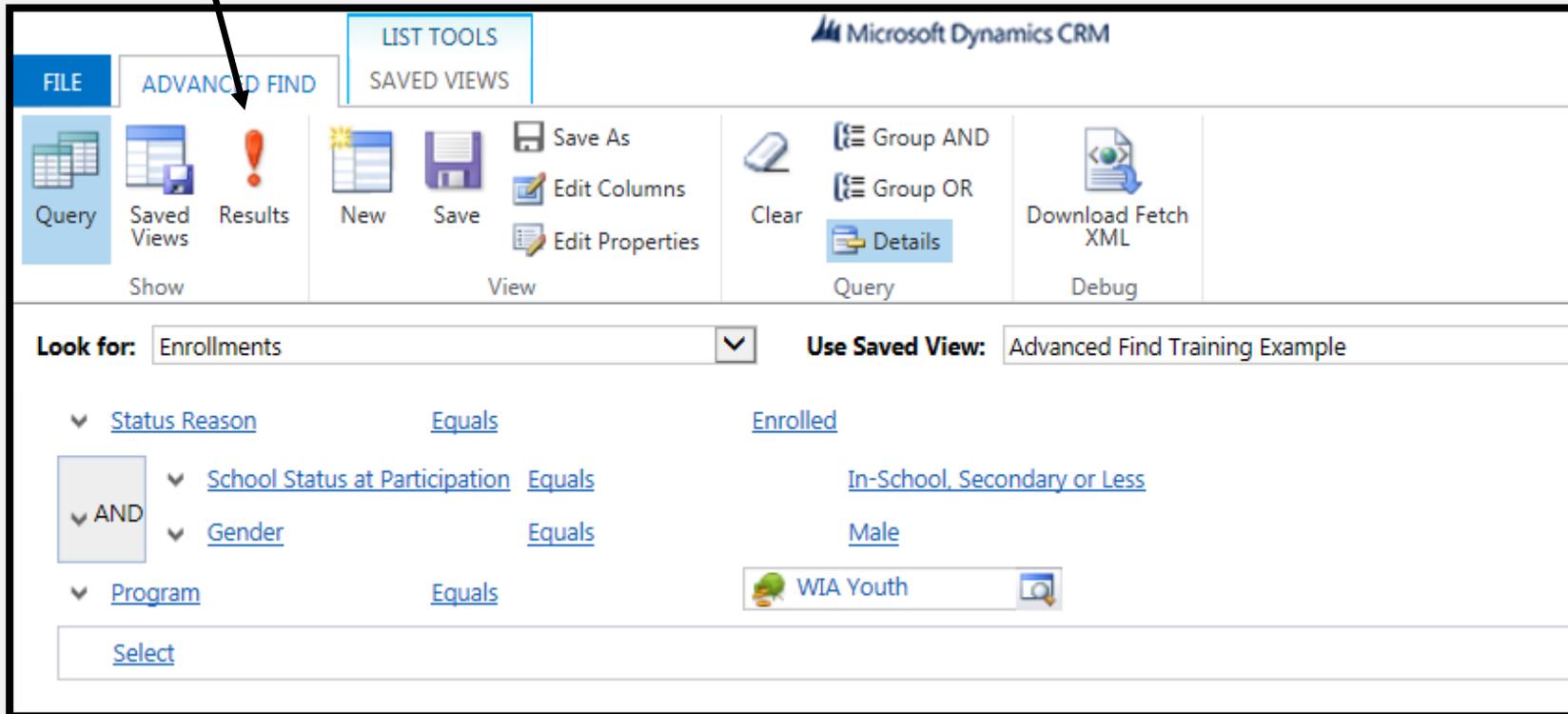
Grouping rows will be highlighted when ready to be grouped. Group by selecting desired grouping type



Result

RUN SEARCH RESULTS

Once your search parameters and criteria are set, you can generate the search results by selecting the Results icon seen below, and your list will populate:



The screenshot displays the Microsoft Dynamics CRM interface. At the top, the 'LIST TOOLS' ribbon is active, with the 'ADVANCED FIND' group selected. The 'Results' icon, represented by a red exclamation mark, is highlighted. Below the ribbon, the search criteria are defined as follows:

- Look for:** Enrollments
- Use Saved View:** Advanced Find Training Example
- Criteria:**
 - Status Reason Equals Enrolled
 - School Status at Participation Equals In-School, Secondary or Less
 - Gender Equals Male
 - Program Equals WIA Youth

A 'Select' button is visible at the bottom of the criteria section.

Microsoft Dynamics CRM

FILE ADVANCED FIND LIST TOOLS ENROLLMENTS

New Enrollment Edit Activate Deactivate Delete Enrollment Add to Queue Follow Unfollow Assign Enrollments Share Email a Link Run Report

Records Collaborate

✓	Name ↑	Created On
	WIA Youth	10/27/2016 3:15 PM
	WIA Youth	11/7/2016 3:11 PM
	WIA Youth	11/7/2016 3:48 PM
	WIA Youth	5/29/2017 2:13 PM
	WIA Youth	4/28/2017 3:34 PM
	WIA Youth	3/3/2017 11:15 AM
	WIA Youth	11/11/2016 2:25 PM
	WIA Youth	11/25/2016 12:44 PM
	WIA Youth	8/20/2016 9:59 AM
	WIA Youth	3/16/2017 12:10 PM
	WIA Youth	3/28/2017 10:44 AM
	WIA Youth	3/28/2017 11:28 AM
	WIA Youth	3/31/2017 9:57 AM

1 - 50 of 85 (0 selected)

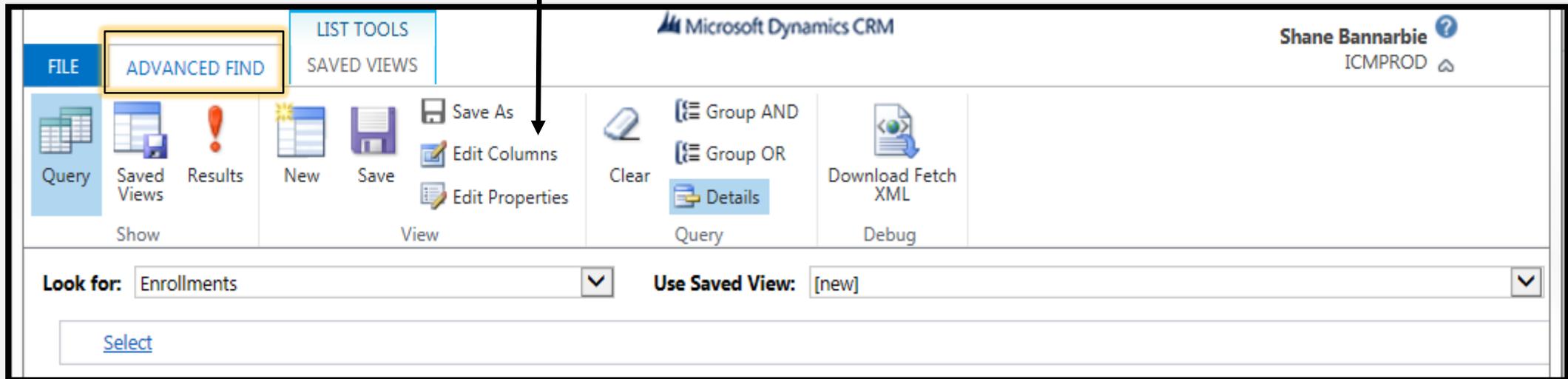
EXAMPLE RESULTS

When results generate you will see a list of those matching your search criteria. You will also notice only two columns of information for the results: "Name" and "Created On".

To add additional column headings, which will provide more details on your results, you must go back to the "Advanced Find" view to edit. –see next slide

ADDING COLUMNS

From the Advanced Find tab... You have the ability to add columns to the results by selecting the Edit Columns tab



The screenshot displays the Microsoft Dynamics CRM interface. At the top, the ribbon includes the 'FILE' tab, the 'ADVANCED FIND' tab (highlighted with a yellow border), and the 'LIST TOOLS' and 'SAVED VIEWS' tabs. The 'ADVANCED FIND' ribbon contains several groups of tools: 'Query' (Query, Saved Views, Results), 'View' (New, Save, Save As, Edit Columns, Edit Properties), 'Query' (Clear, Group AND, Group OR, Details), and 'Debug' (Download Fetch XML). The 'Edit Columns' tool is highlighted with a blue selection bar. Below the ribbon, the 'Look for:' dropdown is set to 'Enrollments' and the 'Use Saved View:' dropdown is set to '[new]'. A 'Select' button is visible at the bottom left of the interface.

ADDING COLUMNS

- Select “Add Columns” from menu
- Select the “Record Type” (enrollment filter)
- For this scenario, add: Full Name, and Enrollment Date
- Let’s also add ... Select “OK” to save

Add Columns Step 2 ×

Select the columns to add to this view.

Record Type:

<input type="checkbox"/>	Display Name ▲	Name	Type
<input type="checkbox"/>	Force Save Toggle	icm_forcesavetoggle	Two Options
<input type="checkbox"/>	Foster Care	icm_fostercare	Option Set
<input type="checkbox"/>	Frequent Breaks	icm_frequentbreaks	Two Options
<input type="checkbox"/>	Full Name	icm_fullname	Single Line of Text
<input type="checkbox"/>	Gender	icm_gender	Option Set
<input type="checkbox"/>	Group Size	icm_groupsize	Whole Number
<input type="checkbox"/>	Has Limited English Language	icm_haslimitedenglishlang...	Option Set
<input type="checkbox"/>	High School Student	icm_ishighschoolstudent	Option Set

Step 1 ×

will be displayed in the view.

Full Name | Created On

Common Tasks

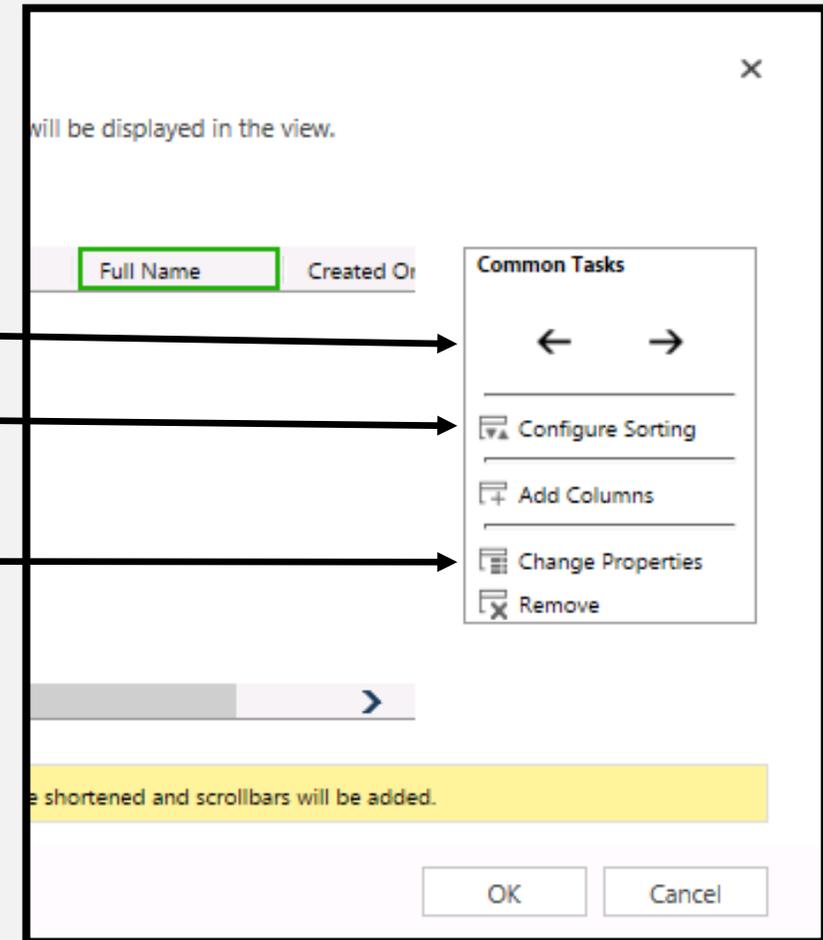
← →

... shortened and scrollbars will be added.

MOVING HEADERS

Relocate column positions:

- Selecting the column to be moved (green box appears)
- Use Left or Right Arrows to select placement
- Columns can also be sorted or properties customized with “Configure Sorting and “Change Properties”



EXAMPLE RESULTS WITH COLUMNS ADDED

Below is an example of the report with added columns: “Full Name” and “Enrollment Date”. You will notice the columns provide further details for your search query.

The screenshot displays the Microsoft Dynamics CRM interface for an Advanced Find search. The title bar reads "Advanced Find - Microsoft Dynamics CRM - Cases My Cases - Microsoft Dynamics CRM". The breadcrumb trail is "FILE > ADVANCED FIND > ENROLLMENTS". The ribbon includes "LIST TOOLS" and "ENROLLMENTS". The ribbon groups are "Records" (New Enrollment, Edit, Activate, Deactivate, Delete Enrollment), "Collaborate" (Add to Queue, Follow, Unfollow, Assign Enrollments, Share, Email a Link), "Data" (Run Report, Export Enrollments), and "ICM Help" (Help, ICM Intro). The user's name "Shane Ba" is visible in the top right corner.

✓	Name ↑	Created On	Full Name	Enrollment Date...
	WIA Youth	10/27/2016 3:15 PM	Nagy, Nolan L.	10/27/2016
	WIA Youth	11/7/2016 3:11 PM	Edmund, Kenneth	7/1/2016
	WIA Youth	11/7/2016 3:48 PM	Damian, Clifford...	7/1/2016

SAVE YOUR WORK!!

You must save your Advanced Find queries to access them repeatedly, unsaved work will not be stored. Save queries by selecting the “Save As” icon, a save view will populate where you will name and save your query. Saved queries are stored in “Use Saved Views” and can be updated at later dates.

Save as new View

The view is stored in the list of saved views.

Name *

Advanced Find Training Example

Description

Save

Cancel

The screenshot displays the Microsoft Dynamics CRM Advanced Find interface. The top navigation bar includes 'FILE', 'ADVANCED FIND', and 'LIST TOOLS'. The 'ADVANCED FIND' ribbon is active, showing icons for 'Query', 'Saved Views', 'Results', 'New', 'Save', 'Save As', 'Edit Columns', 'Edit Properties', 'Clear', 'Group AND', 'Group OR', 'Details', and 'Download Fetch XML'. Below the ribbon, the 'Look for:' dropdown is set to 'Enrollments', and the 'Use Saved View:' dropdown is set to 'Advanced Find Training Example'. The main area shows a query with the following criteria:

- Status Reason Equals Enrolled
- School Status at Participation Equals In-School, Secondary or Less
- Gender Equals Male
- Program Equals WIA Youth

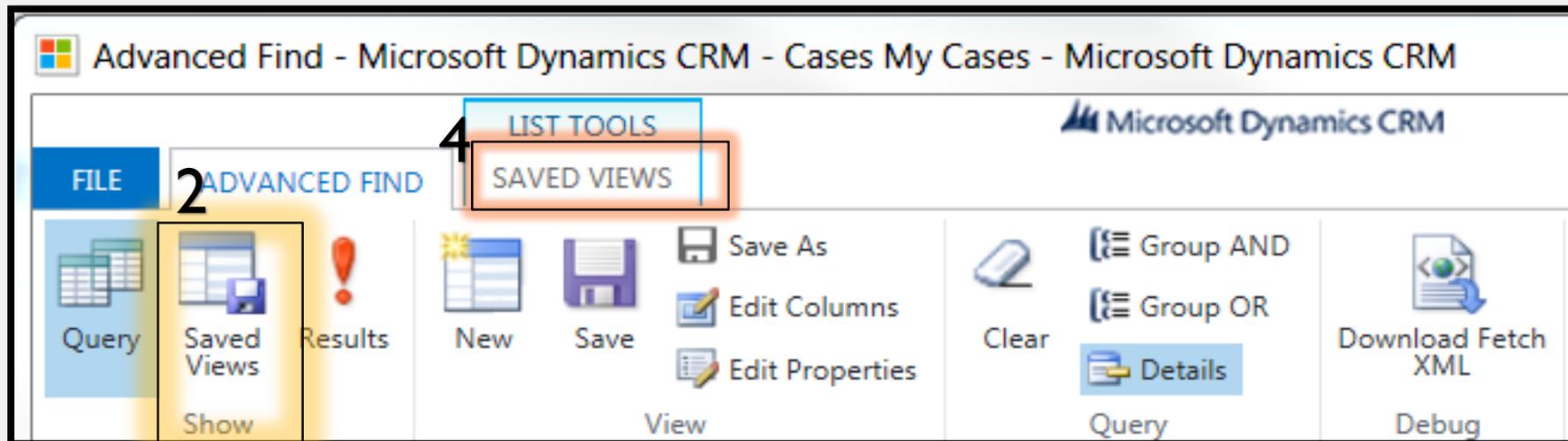
The 'Save as new View' dialog box is overlaid on the right side of the screen, showing the 'Name' field filled with 'Advanced Find Training Example' and the 'Description' field empty. The 'Save' and 'Cancel' buttons are visible at the bottom of the dialog.

SHARING QUERIES

Must share queries in order to share dashboard, use the steps below to share queries:

1. Find your Advanced Find Query
2. Use the “saved views” icon to access list of your saved advanced finds
3. Select saved advanced find query you wish to share
4. *Select the “Saved Views tab”* under List Tools (different from saved view icon)

-See next slide

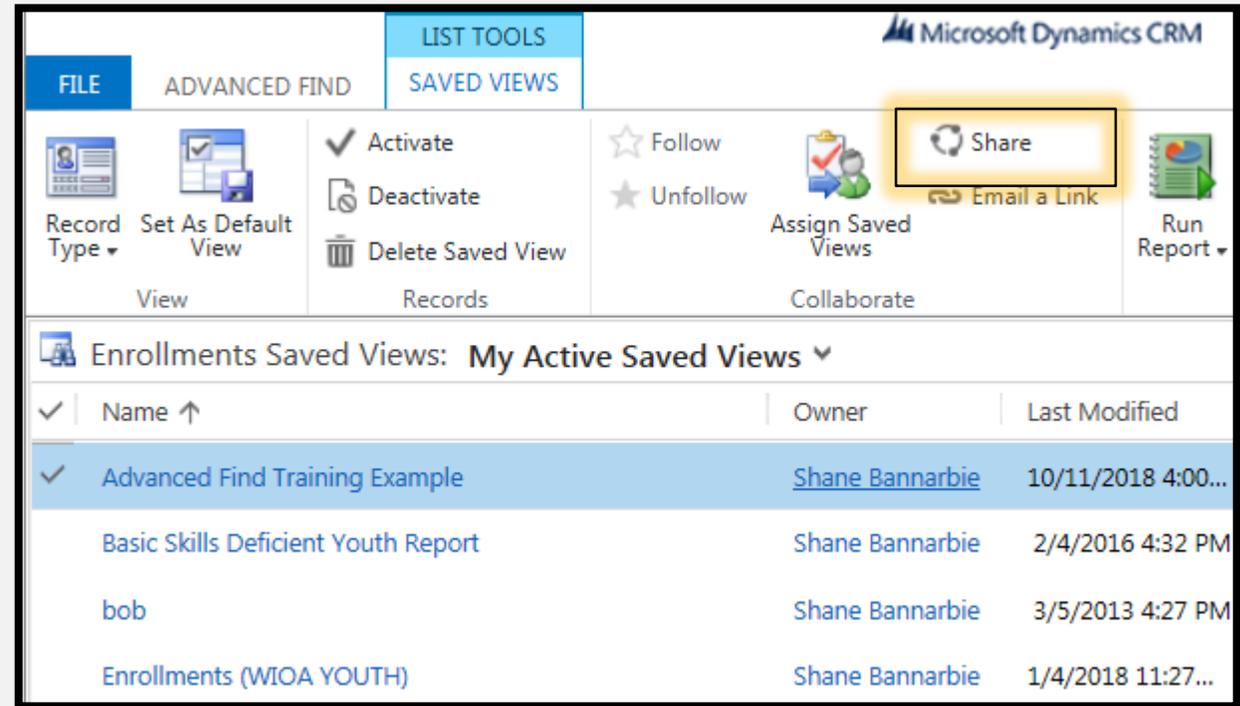


SHARING QUERIES

Once you've identified and selected your query for sharing:

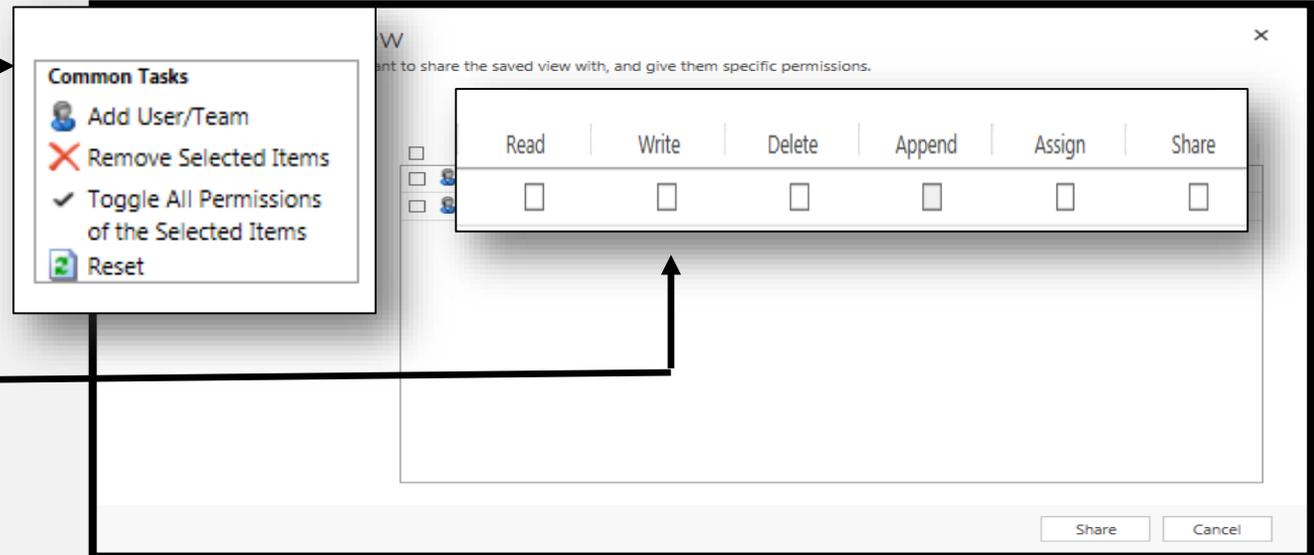
1. Click Share icon: 
2. Use "common Task" fields to add or remove users and toggle their permissions.
3. Lastly click Share

Note: If using a shared query, remember save the query shared with you as your own.



The screenshot shows the Microsoft Dynamics CRM interface. The ribbon is set to 'LIST TOOLS' and 'SAVED VIEWS'. The 'Share' button is highlighted in a yellow box. Below the ribbon, the 'Enrollments Saved Views: My Active Saved Views' table is visible. The table has columns for 'Name', 'Owner', and 'Last Modified'. The 'Advanced Find Training Example' view is selected.

Name	Owner	Last Modified
Advanced Find Training Example	Shane Bannarbie	10/11/2018 4:00...
Basic Skills Deficient Youth Report	Shane Bannarbie	2/4/2016 4:32 PM
bob	Shane Bannarbie	3/5/2013 4:27 PM
Enrollments (WIOA YOUTH)	Shane Bannarbie	1/4/2018 11:27...



The screenshot shows the 'Share' dialog box in Microsoft Dynamics CRM. The 'Common Tasks' section is visible, with the following options:

- Add User/Team
- Remove Selected Items
- Toggle All Permissions of the Selected Items
- Reset

The permissions table is also visible, with columns for 'Read', 'Write', 'Delete', 'Append', 'Assign', and 'Share'. The 'Share' column has a checked checkbox.

Read	Write	Delete	Append	Assign	Share
<input type="checkbox"/>	<input checked="" type="checkbox"/>				

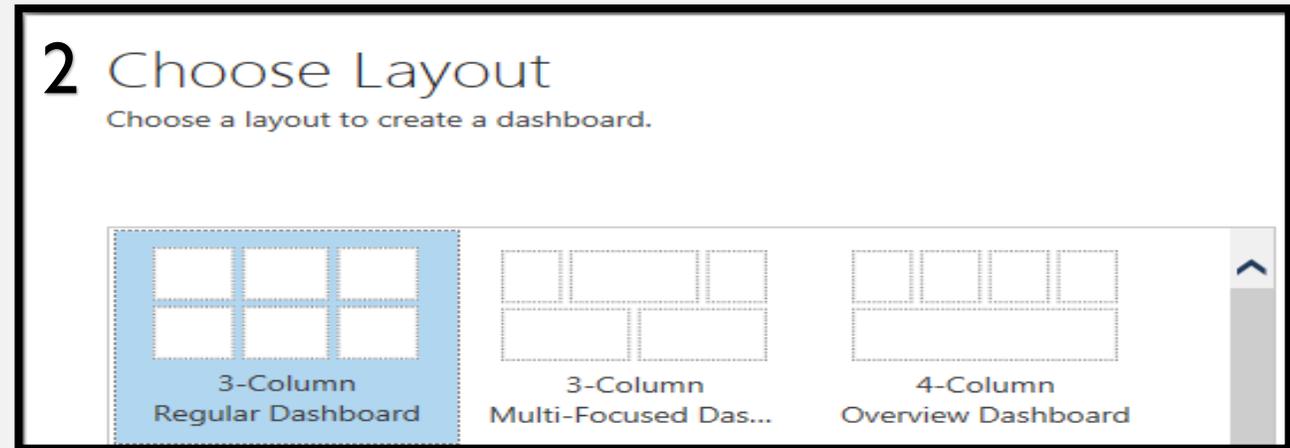
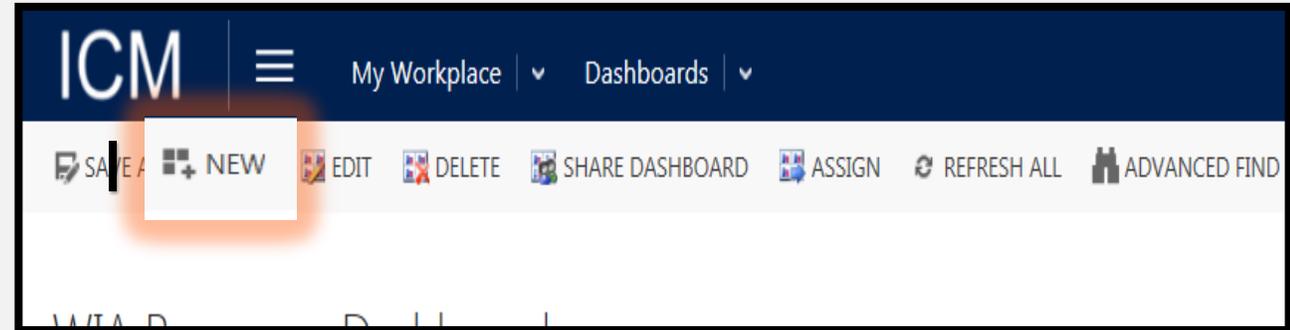
CREATING A DASHBOARD...

WHAT IS A DASHBOARD?

- Provides access to data queries you create via the advanced find features
- Quick access to case load information
- Case management tool to organize participant information

CREATING A DASHBOARD

1. From the My Workplace home screen select the new dashboard icon
2. Choose your preferred layout then select “create”
-See next slide



CREATING A DASHBOARD

1. Select the format you want information displayed in for each section (Use List or chart):



2. Select Record Type (for this example, Enrollment), then → select the saved view you wanted included in the dashboard

3. Then name your dashboard → SAVE and CLOSE

A screenshot of a software interface titled 'Add Component'. Below the title is the instruction 'Choose the component that you want to add to the dashboard.' There are two sections: 'Record Type' and 'View'. The 'Record Type' section has a dropdown menu with 'Enrollments' selected and a blue highlight bar below it. To the right of the dropdown are two columns, each labeled 'Column', with a checkbox to the left of the first one. The 'View' section has a dropdown menu with 'Advanced Find Training Ex' selected.

CREATING A DASHBOARD

1. Your created dashboard will appear on your My Workplace home screen. You will be able to toggle between saved dashboards using the dropdown menu.
2. Records associated with your dashboard can be accessed by clicking the list icon

The screenshot shows the ICM My Workplace interface. At the top, there is a dark blue header with the ICM logo, a hamburger menu icon, and the text 'My Workplace' and 'Dashboards'. Below the header is a toolbar with icons for 'SAVE AS', 'NEW', 'EDIT', 'DELETE', 'SET AS DEFAULT', and 'SHARE DASHBOARD'. The main content area displays a dashboard titled 'Dashboard Example' with a dropdown arrow. Below the title is a search bar labeled 'Advanced Find Training Example' with a search icon. Underneath the search bar is a table with two columns: 'Name' and 'Created On'. The table contains eight rows of data, all with 'WIA Youth' in the 'Name' column and various dates and times in the 'Created On' column. At the bottom of the table, there is a pagination bar showing '1 - 8 of 85' and 'Page 1'.

Name	Created On
WIA Youth	10/27/2016 3:15 PM
WIA Youth	11/7/2016 3:11 PM
WIA Youth	11/7/2016 3:48 PM
WIA Youth	5/29/2017 2:13 PM
WIA Youth	4/28/2017 3:34 PM
WIA Youth	3/3/2017 11:15 AM
WIA Youth	11/11/2016 2:25 PM
WIA Youth	11/25/2016 12:44 PM

THE END

If additional assistance is needed with advanced find or dashboard use, please contact the program coordinator: shane.bannarbie@alsaka.gov