INDIVIDUAL CASE MANAGEMENT SYSTEM (ICM)

Advanced Find and Dashboard Features

ACCESSING ADVANCED FIND…

ADVANCED FIND

FEATURES

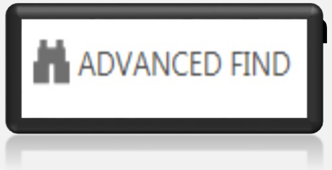
- The Advanced Find is used for pulling data from the ICM
- Information can be filtered to specific data points
- Allows users to create 'views' or 'lists' of data that can be saved and used on dashboards

ACCESS

To access Advanced Find select:

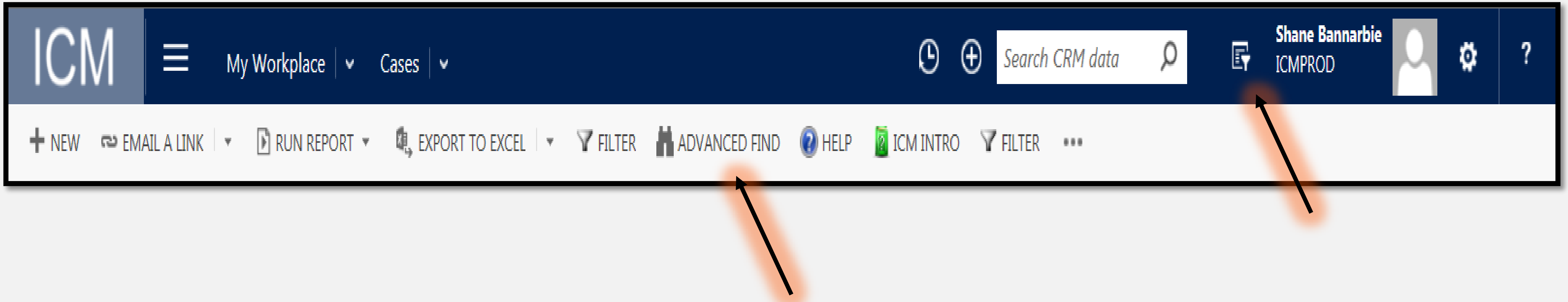
1. Advanced Find icon on the right side of the Navigation Bar.

OR

1. 

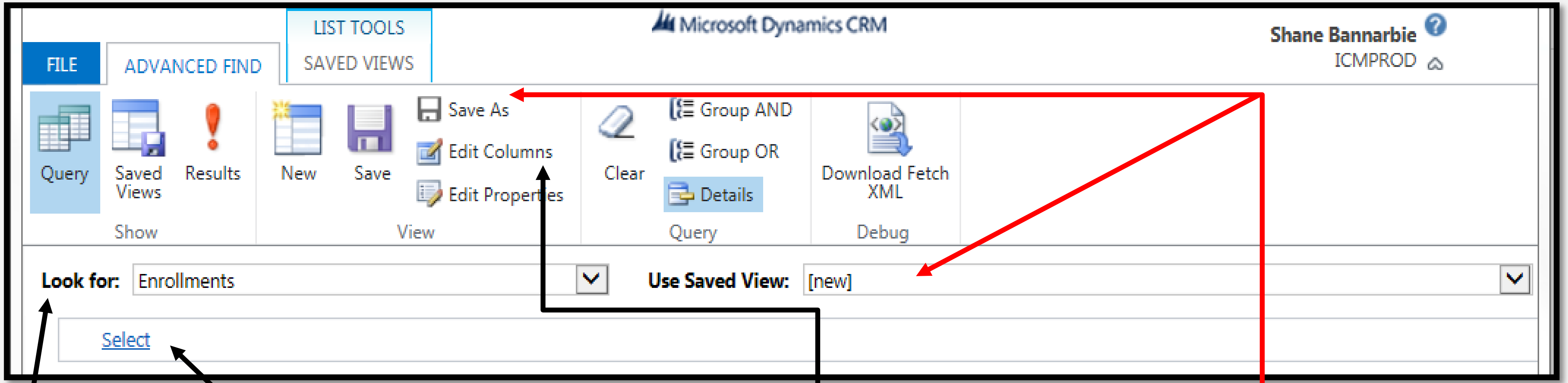
d option in navigation sub-bar

EXAMPLE


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

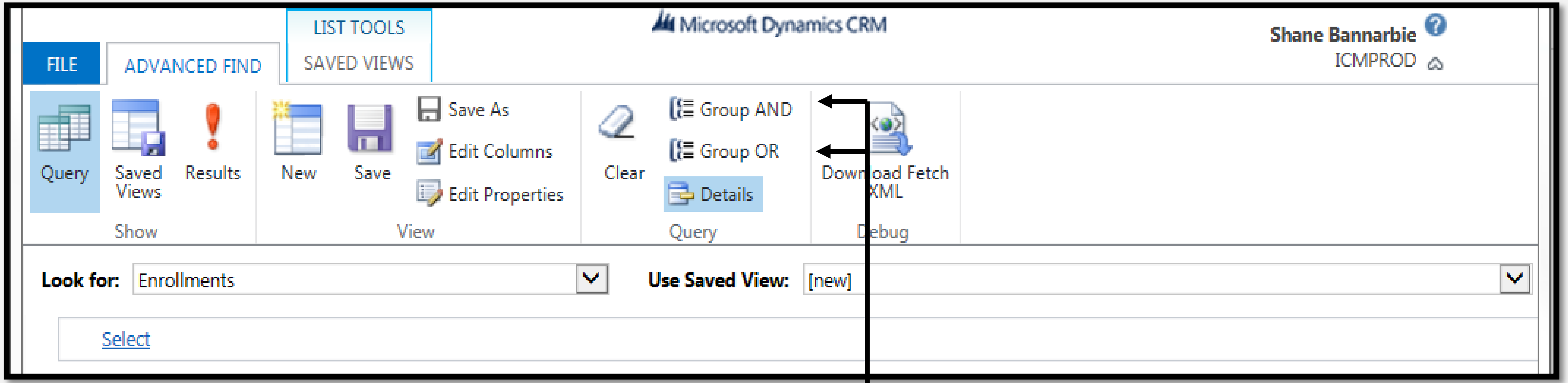
Step 3

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 :

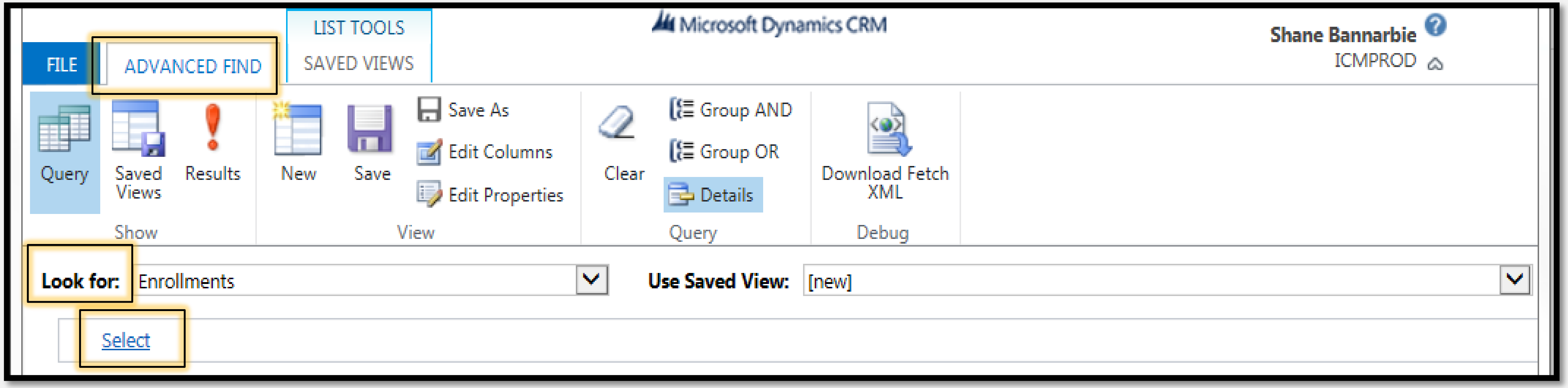
What: **Enrollments in enrolled status**

Who: **In high school or less**

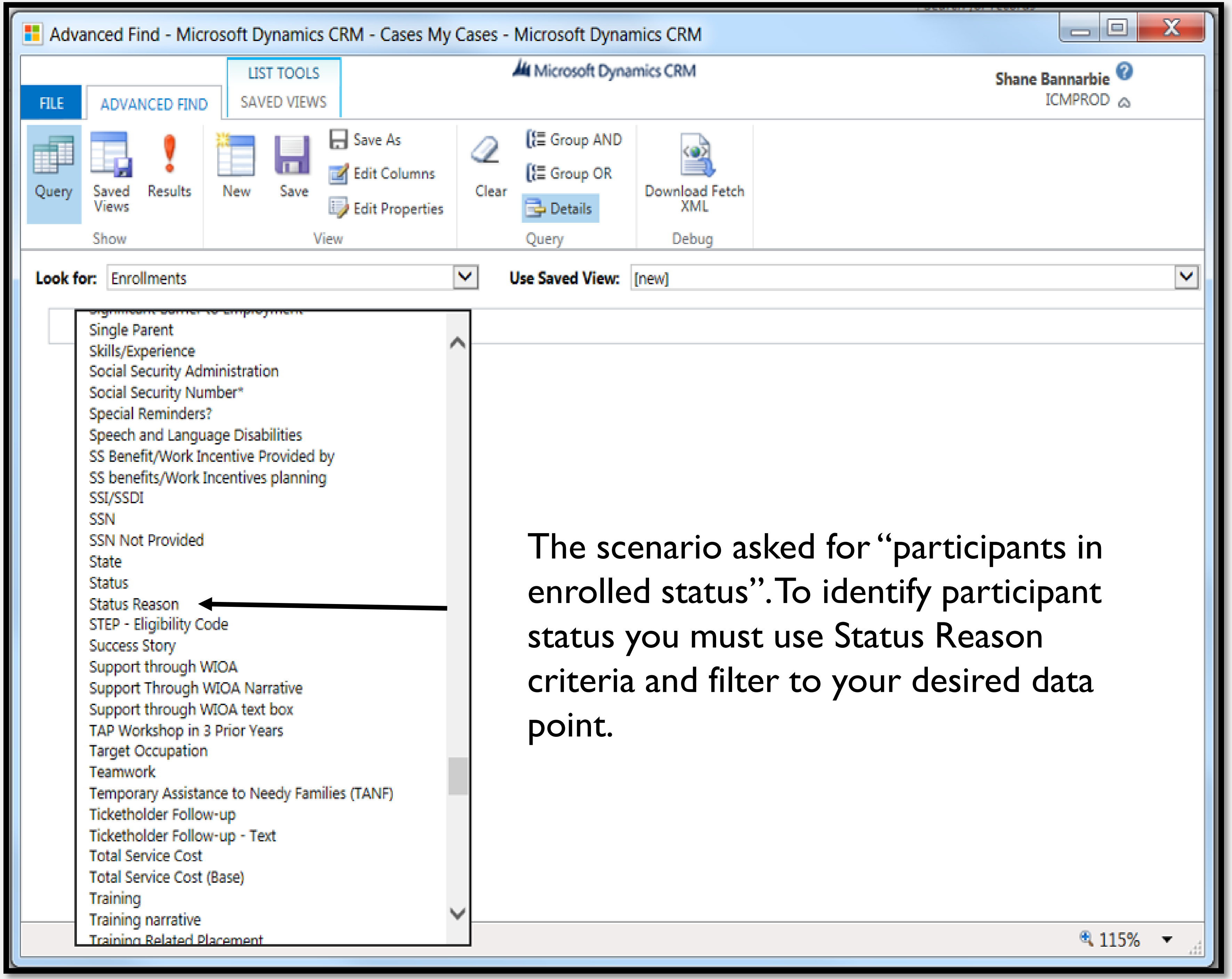
And are: **Male**

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



CRITERIA OPTIONS

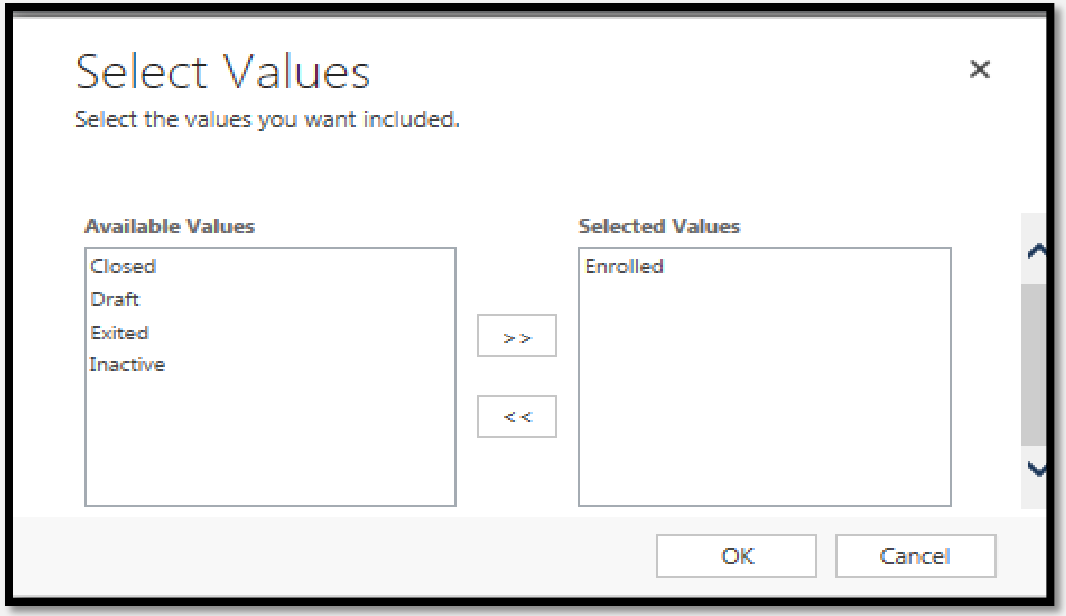


The scenario asked for "participants in enrolled status". To identify participant status you must use Status Reason criteria and filter to your desired data point.

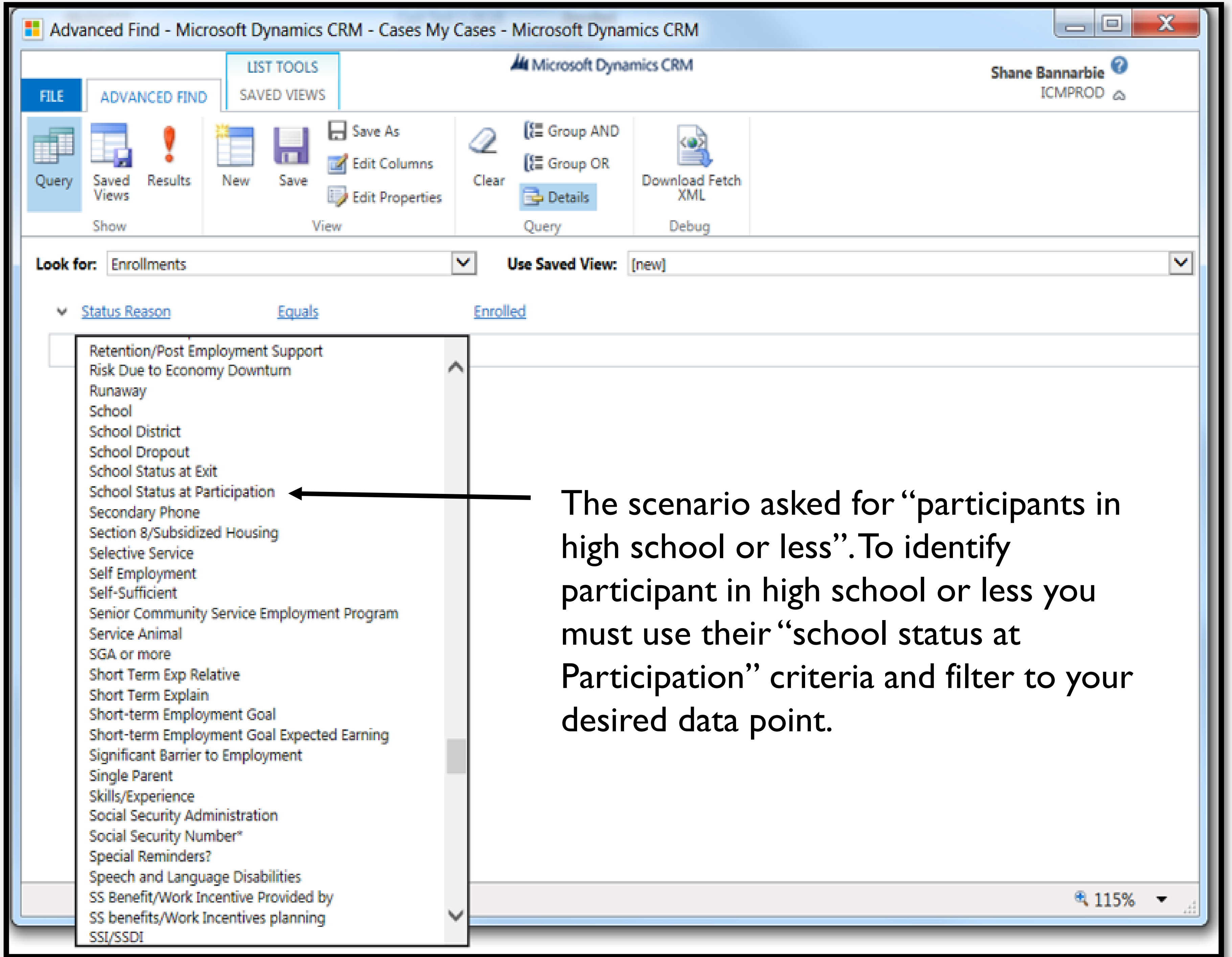
TO BUILD A QUERY - BASICS (CONT.)

Step 5: Selection Criteria (Select)

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



CRITERIA OPTIONS

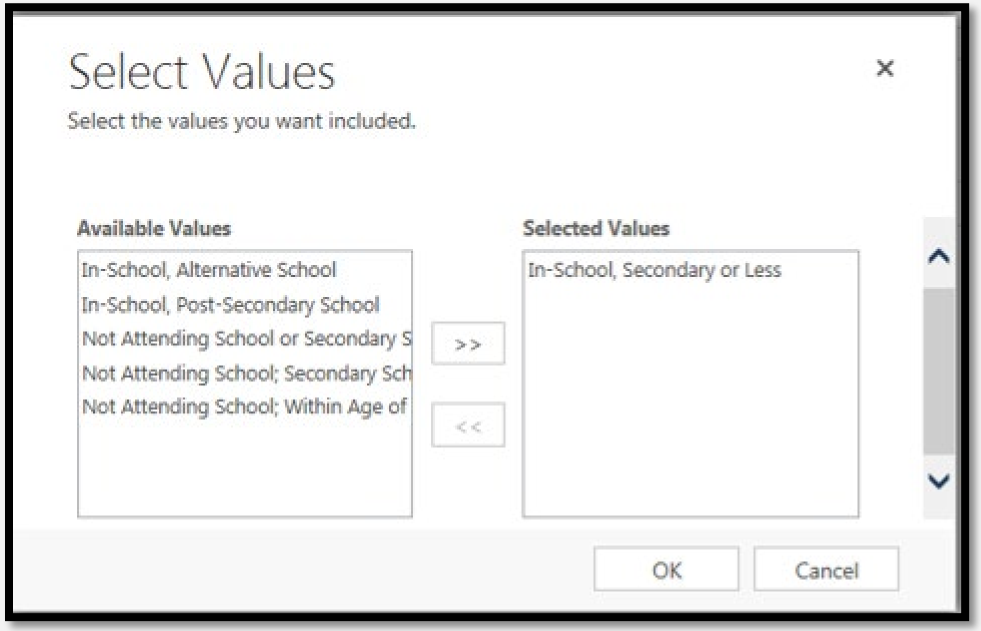


The scenario asked for "participants in high school or less". To identify participant in high school or less you must use their "school status at Participation" criteria and filter to your desired data point.

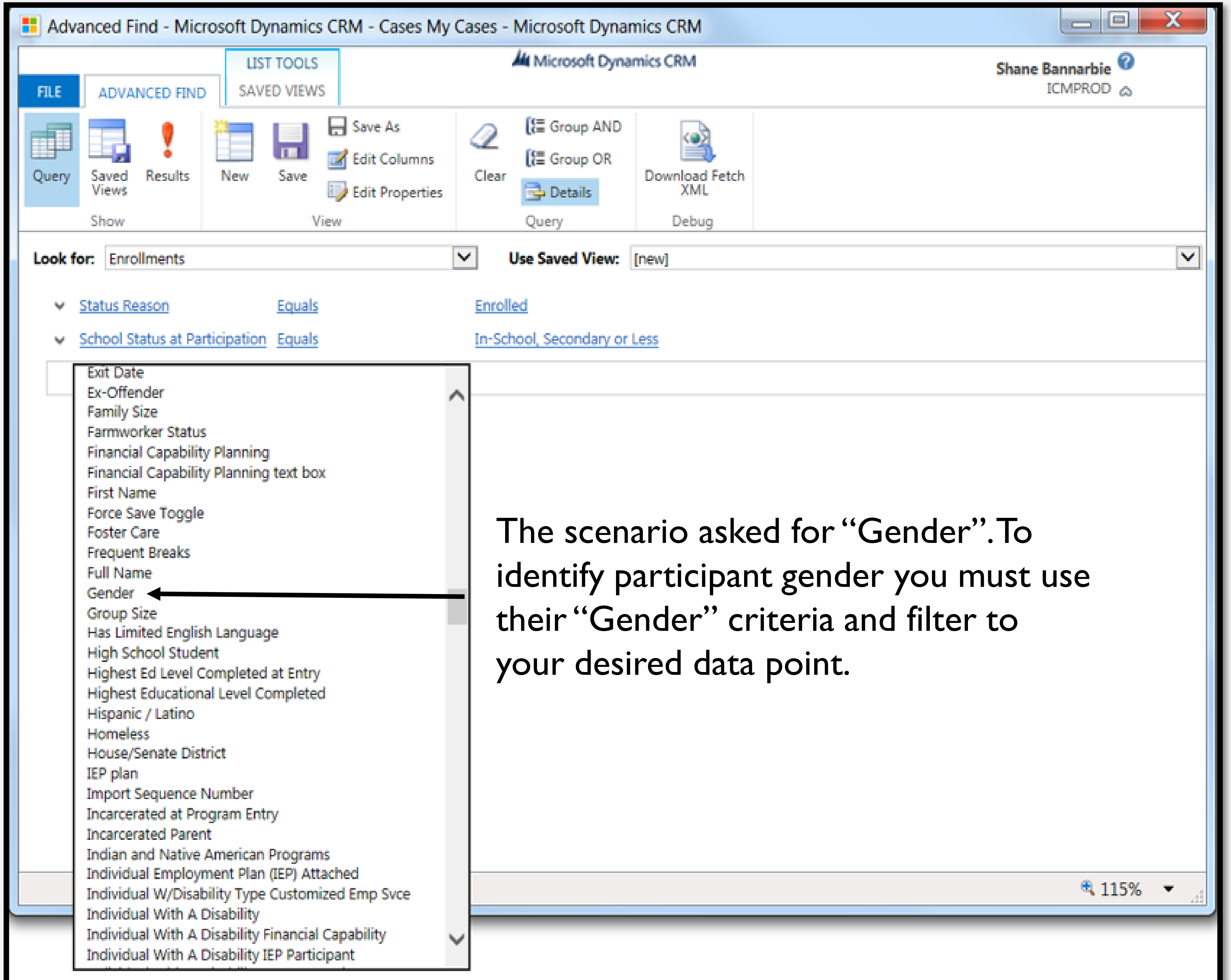
TO BUILD A QUERY - BASICS (CONT.)

Step 6: Selection Criteria (Select)

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



CRITERIA OPTIONS

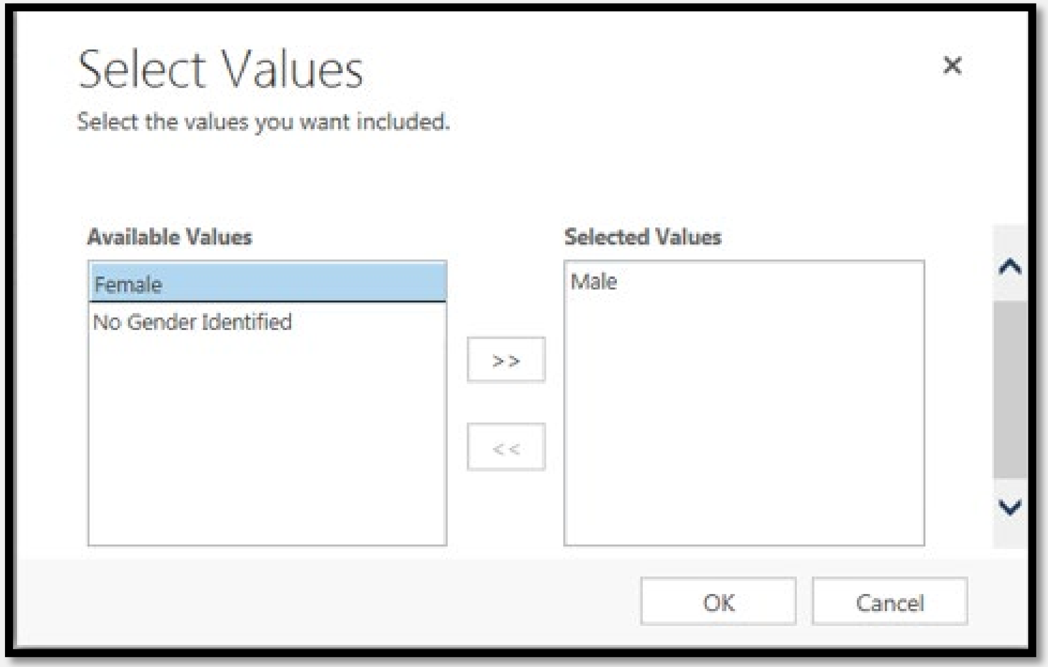


The scenario asked for "Gender". To identify participant gender you must use their "Gender" criteria and filter to your desired data point.

TO BUILD A QUERY - BASICS (CONT.)

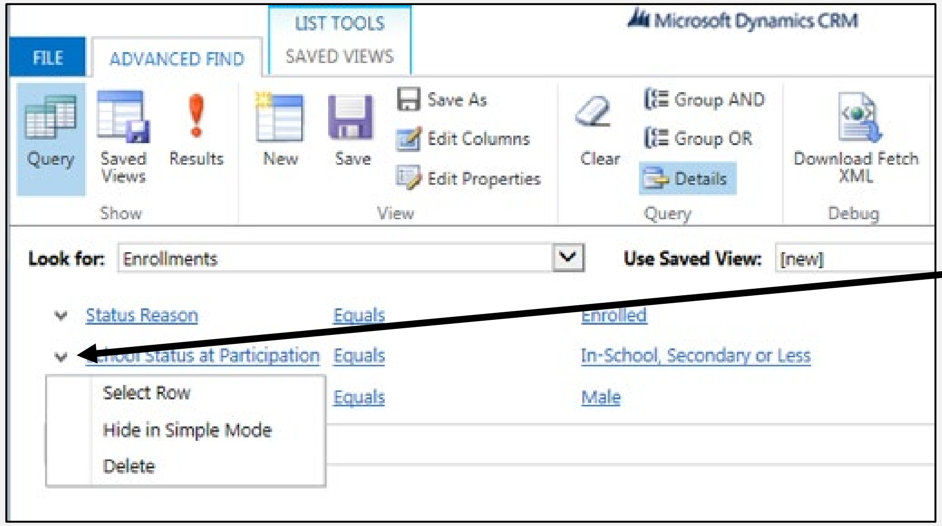
Step 7: Selection Criteria (Select)

- Drop down box narrows down the criteria
- Gender→ Equals → "Male"

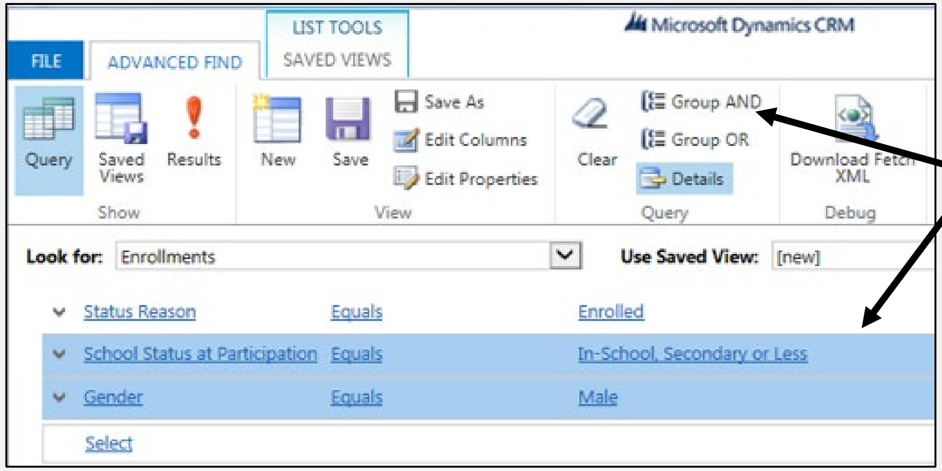


GROUPING CRITERIA

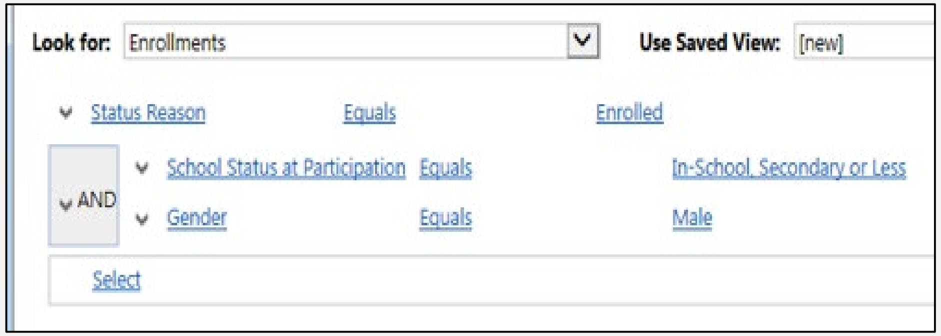
The scenario asked for participants who are "In-School AND are male. The grouping function " Group AND" can be used to set this parameter



Identify criteria for grouping with " select row" from the criteria dropdown:



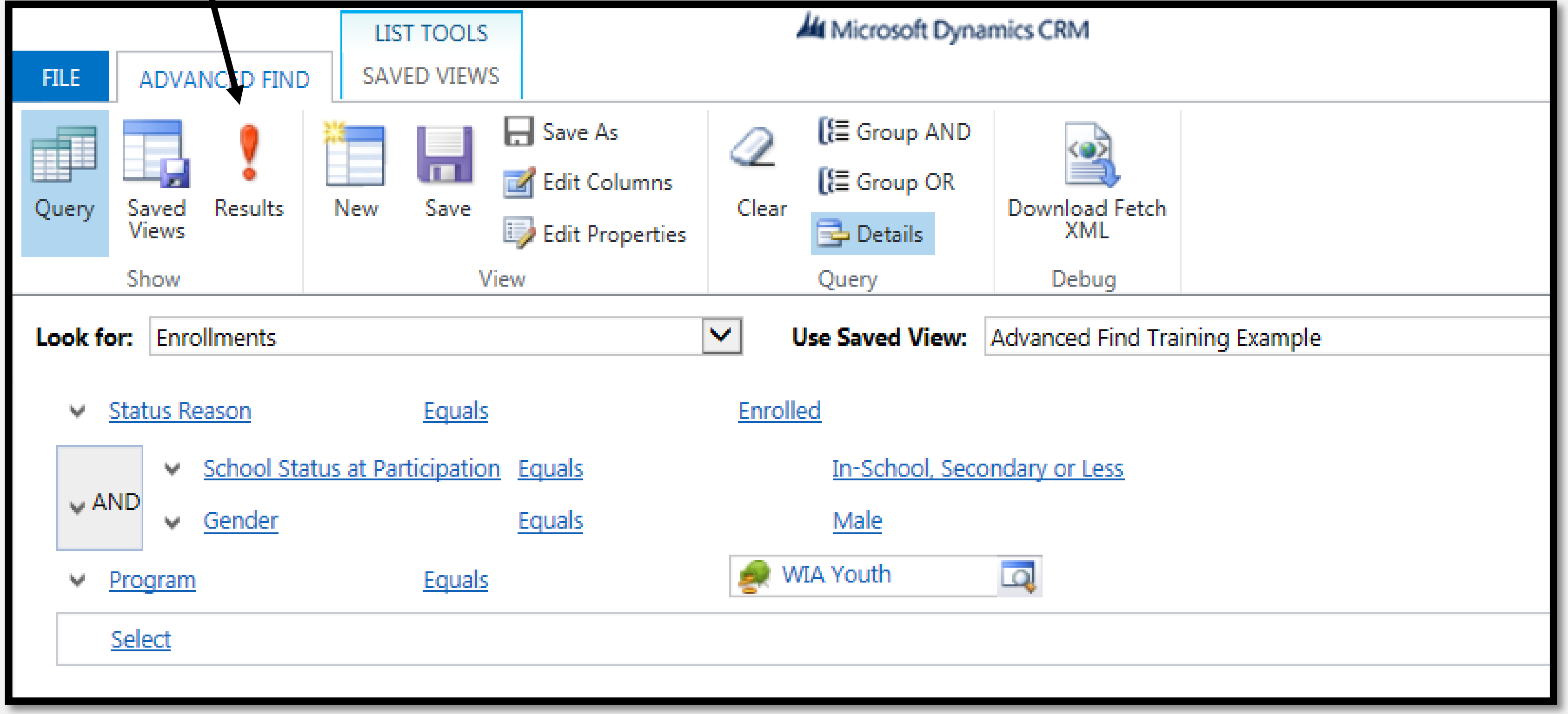
Grouping rows will be highlighted when ready to be grouped. Group by selecting desired grouping type

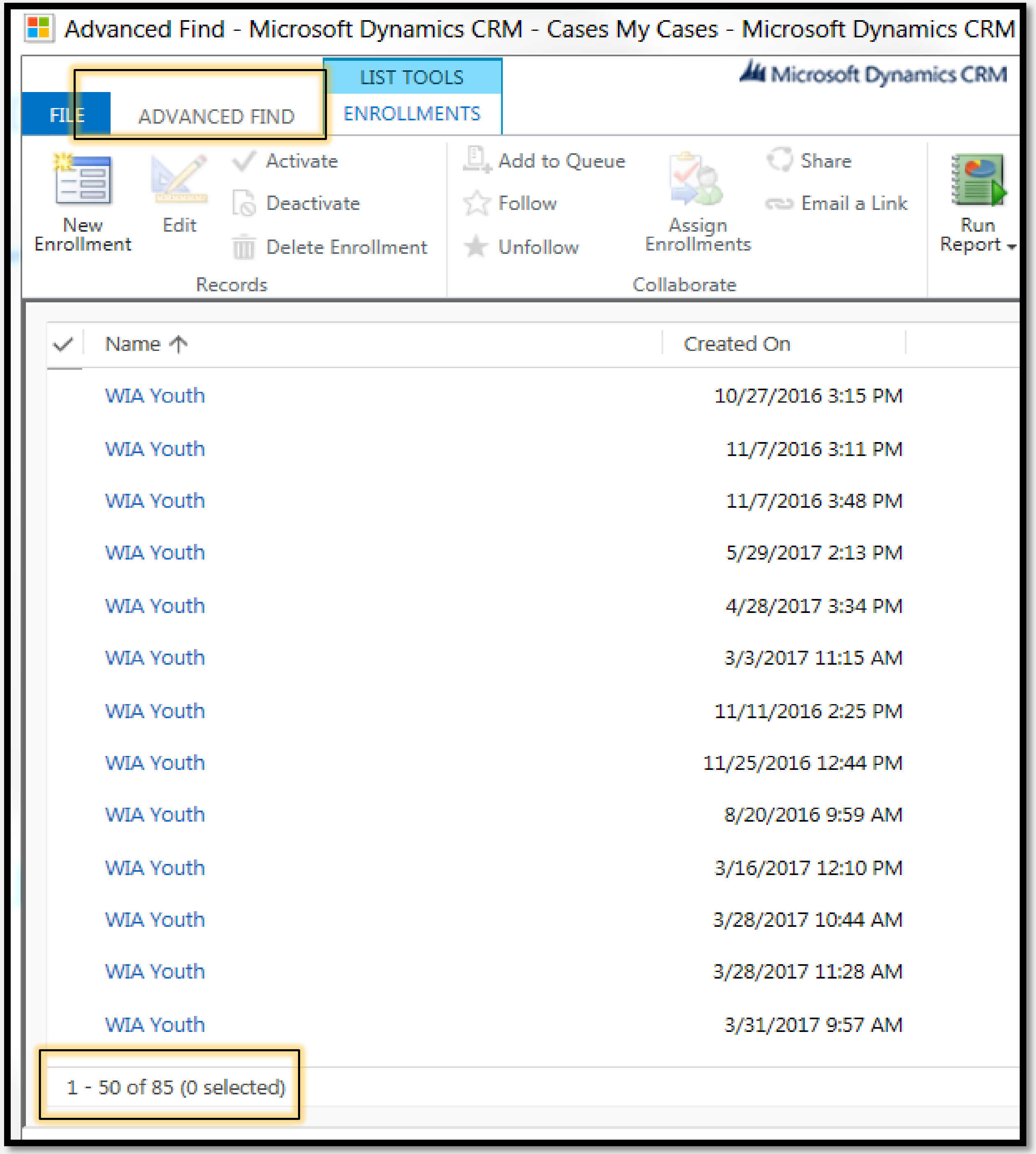


Result

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:





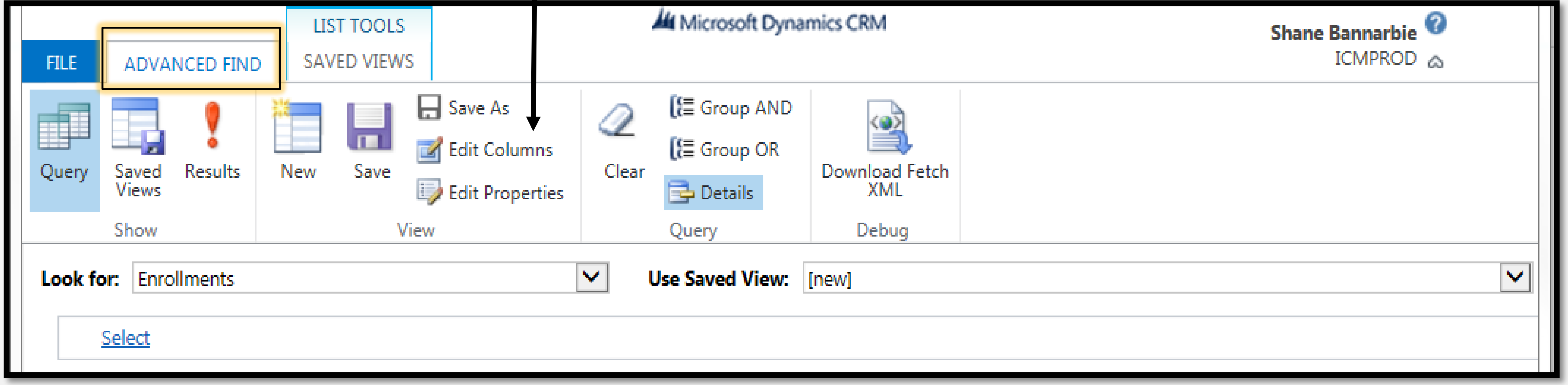
EXAMPLE RESULTS

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

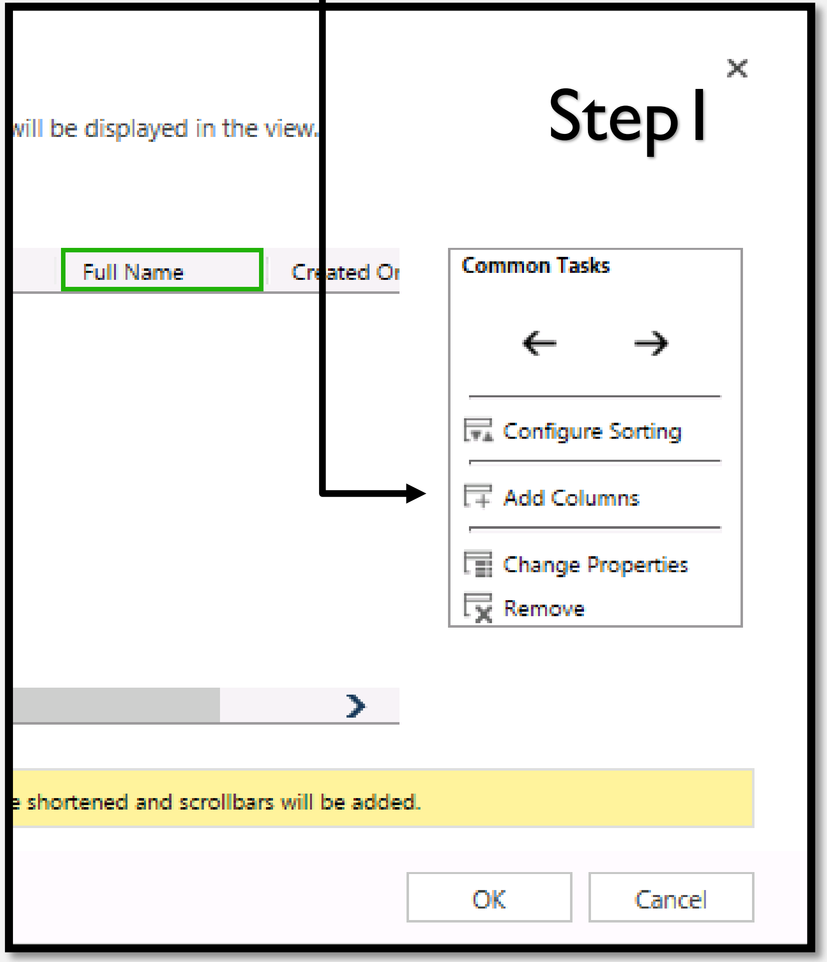
ADDING COLUMNS

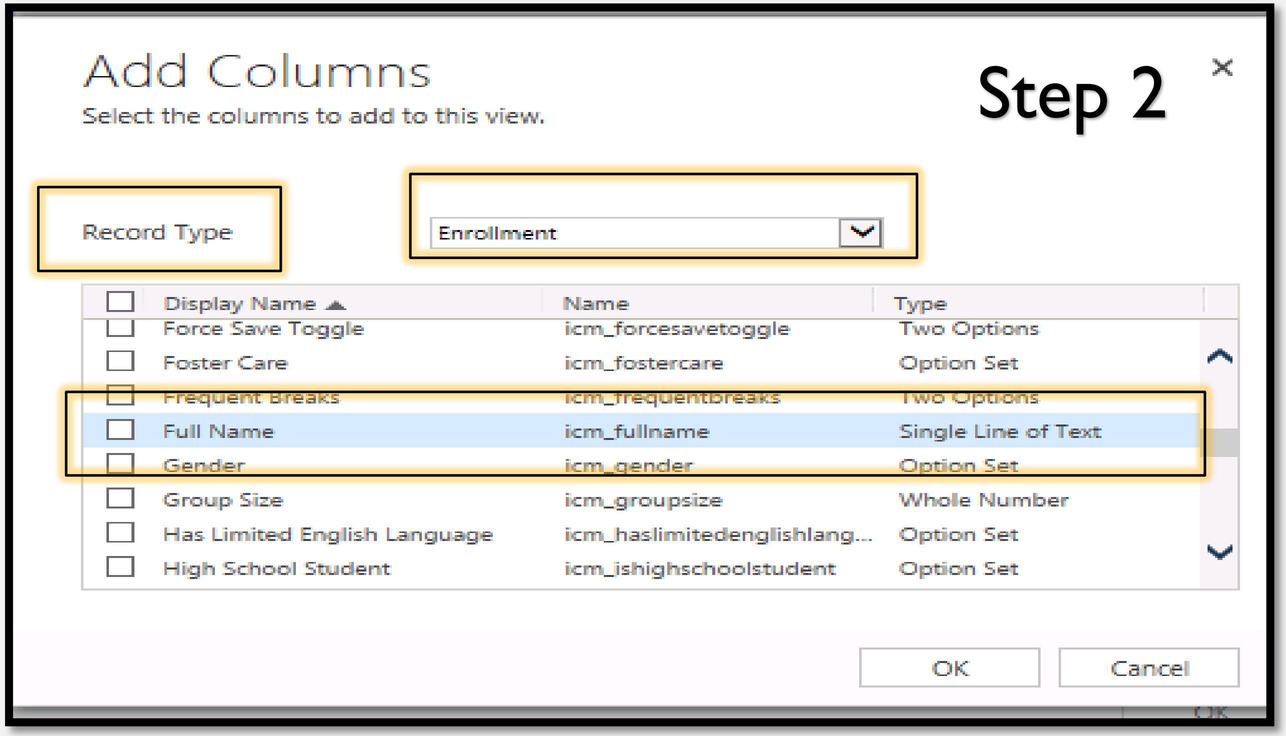
From the Advanced Find tab… You have the ability to add columns to the results by selecting the Edit Columns tab



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

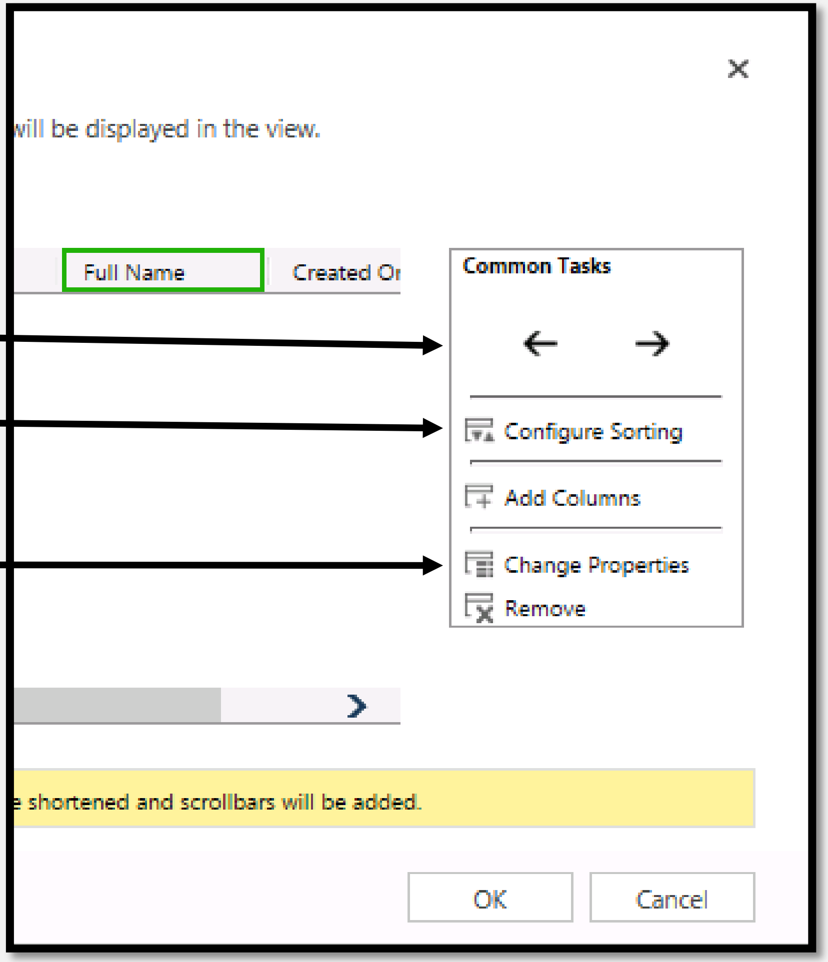




MOVING HEADERS

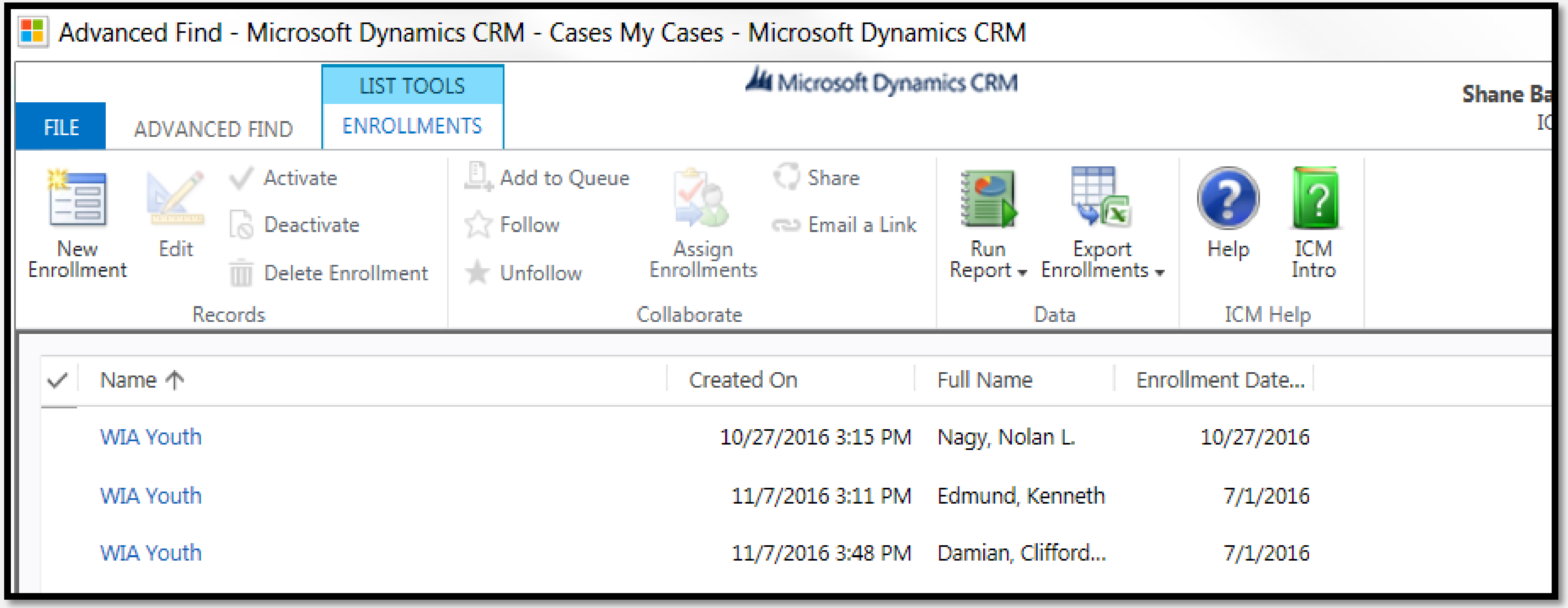
Relocate column positions:

- 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"



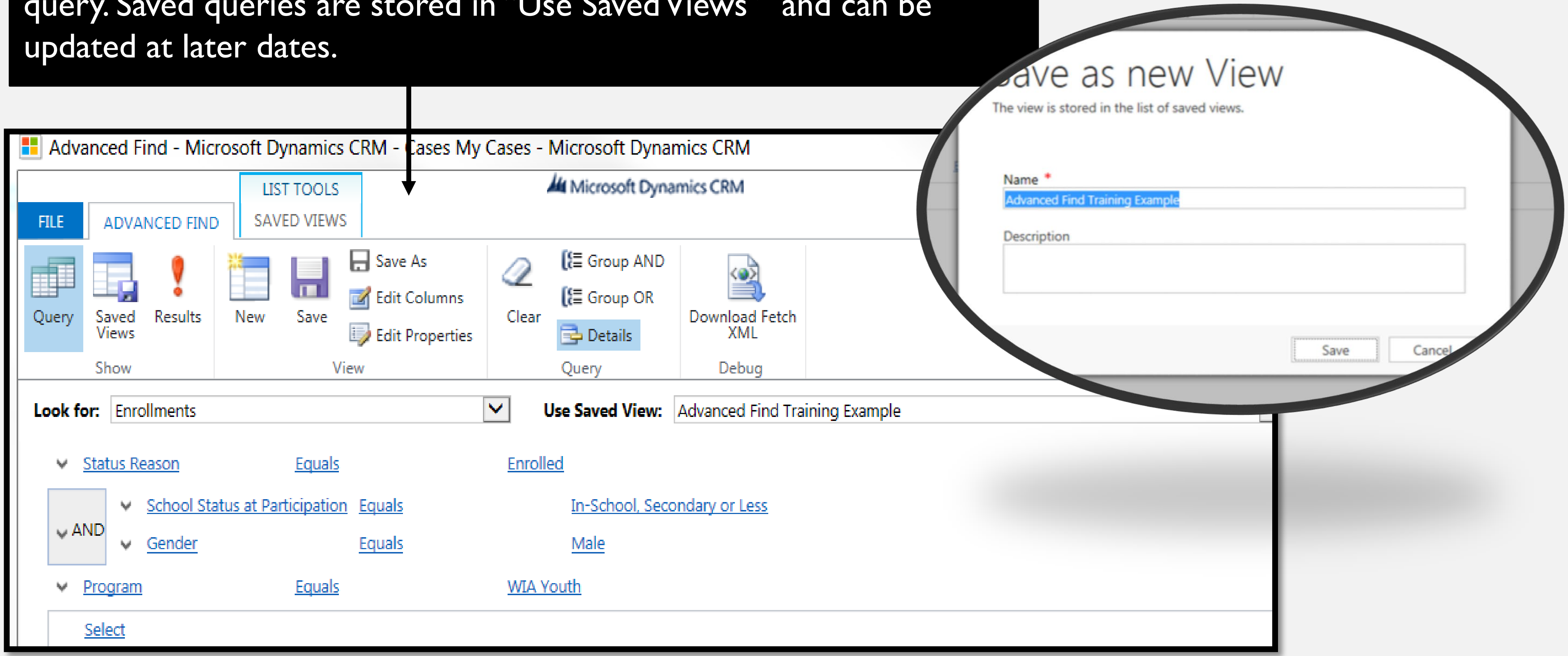
EXAMPLE RESULTS WITH COLUMNS ADDED

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.



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.

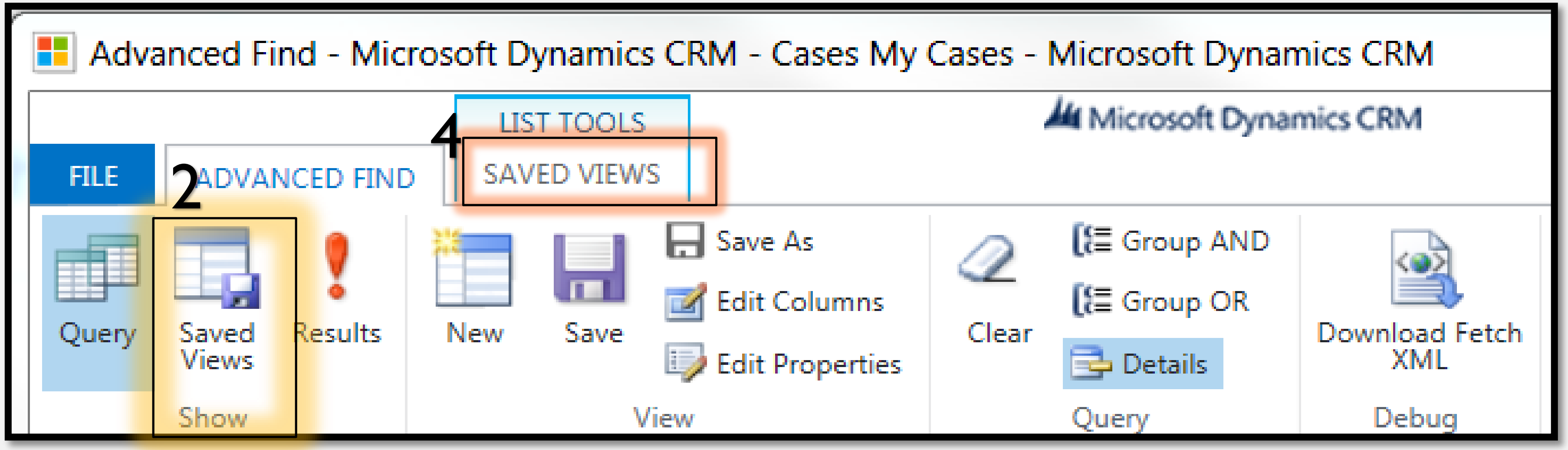


SHARING QUERIES

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



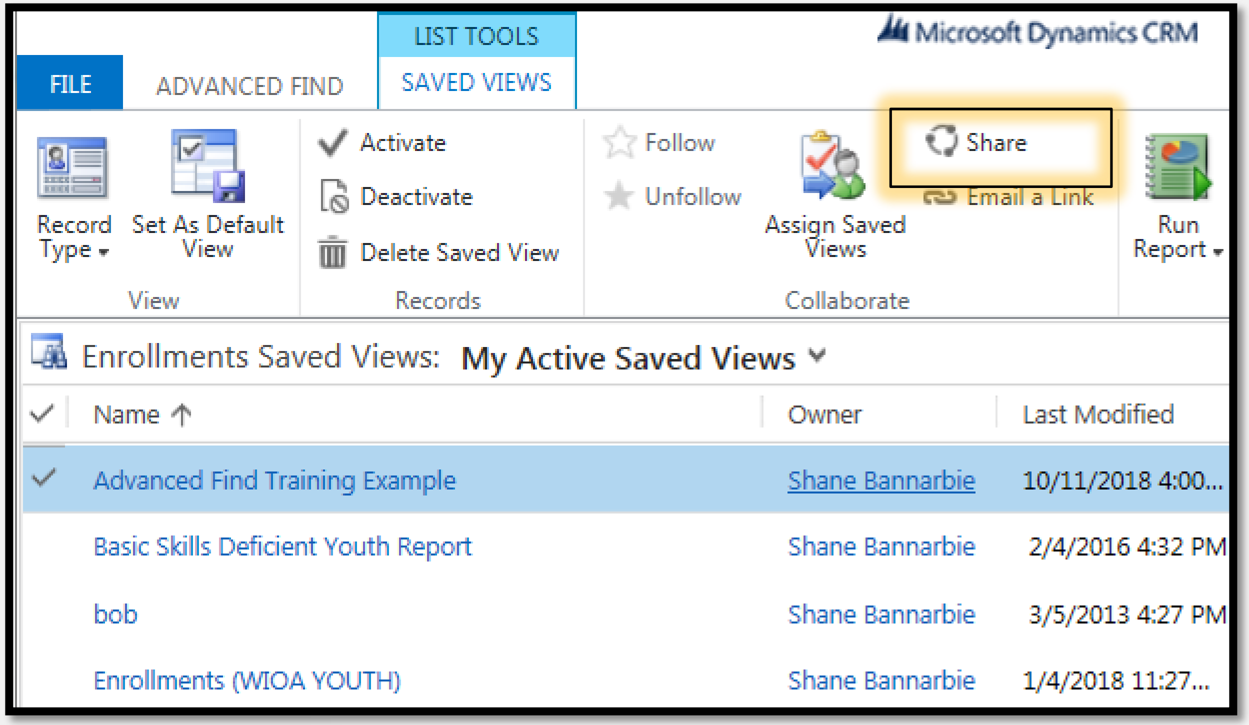
SHARING QUERIES

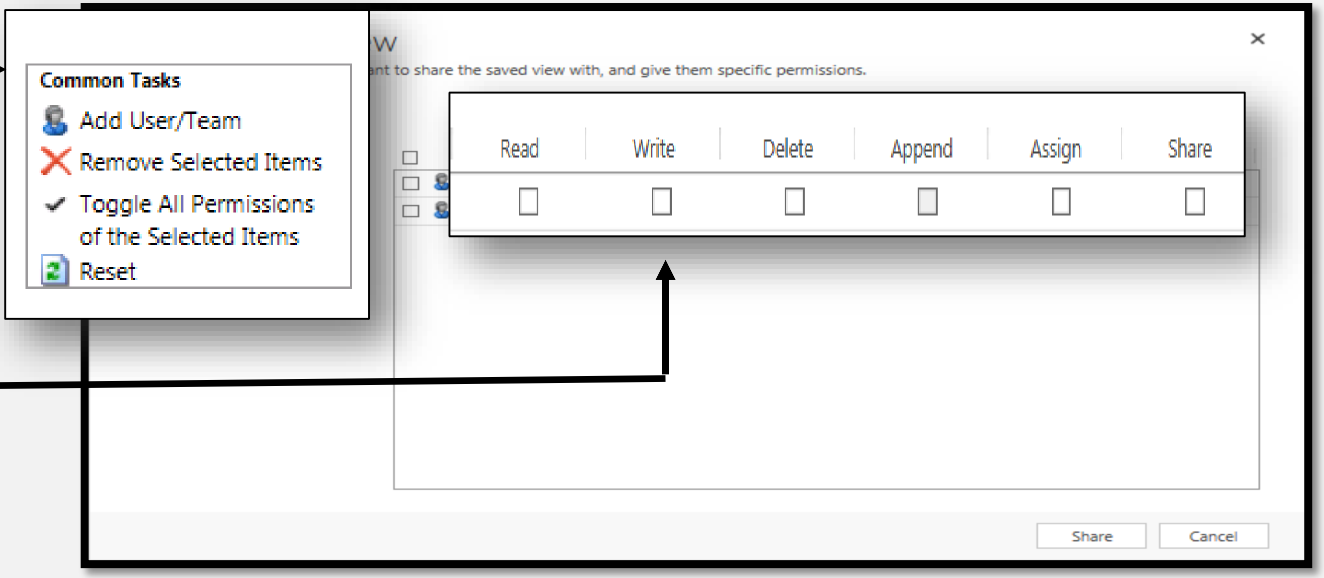
Once you've identified and selected your query for sharing:

1. Click Share icon: 

2. Use "common Task" fields to add or remove users and toggle their permissions.
3. Lastly lick Share

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





CREATING A DASHBOARD…

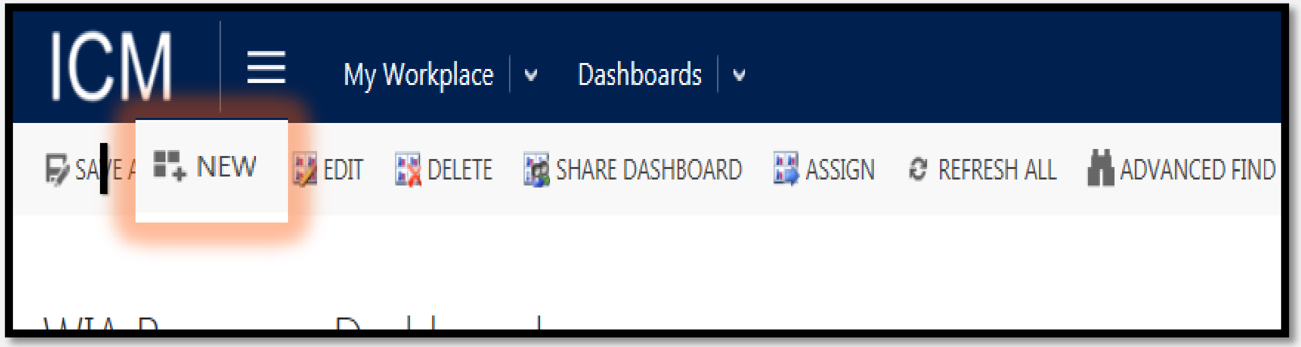
WHAT IS A DASHBOARD?

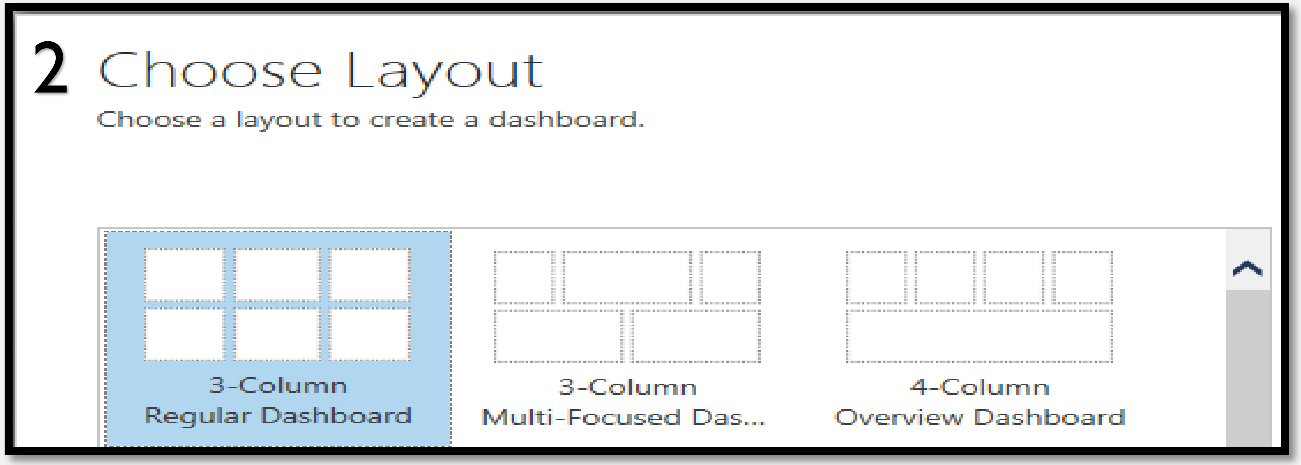
- Provides access to data queries you create via the advanced find features
- Quick access to case load information
- Case management tool to organize participant information

CREATING A DASHBOARD

1. From the My Workplace home screen select the new dashboard icon
2. Choose your preferred layout then select "create"

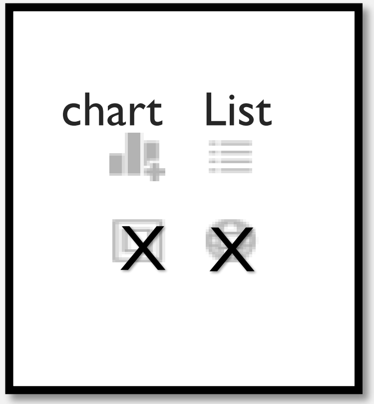
   -See next slide





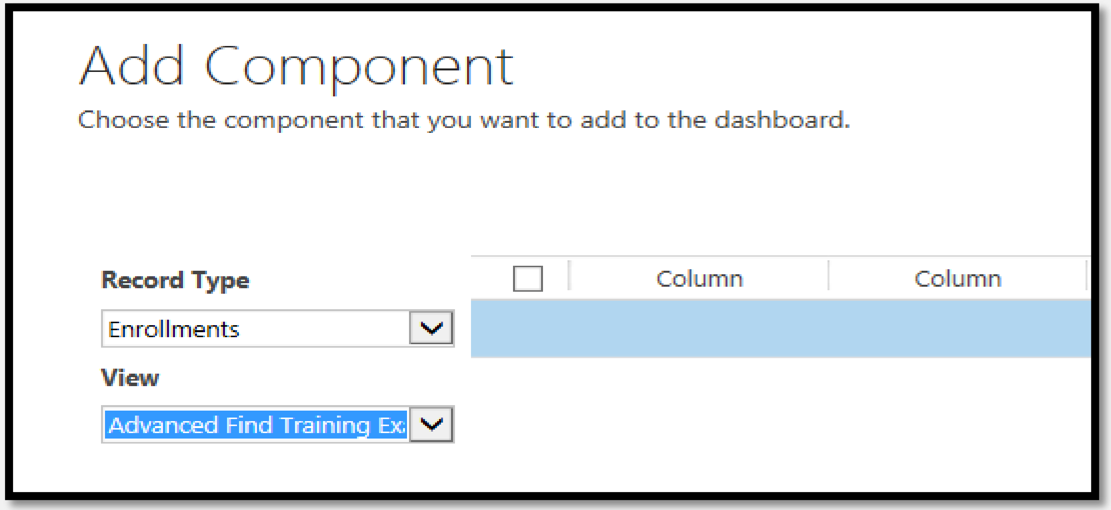
CREATING A DASHBOARD

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



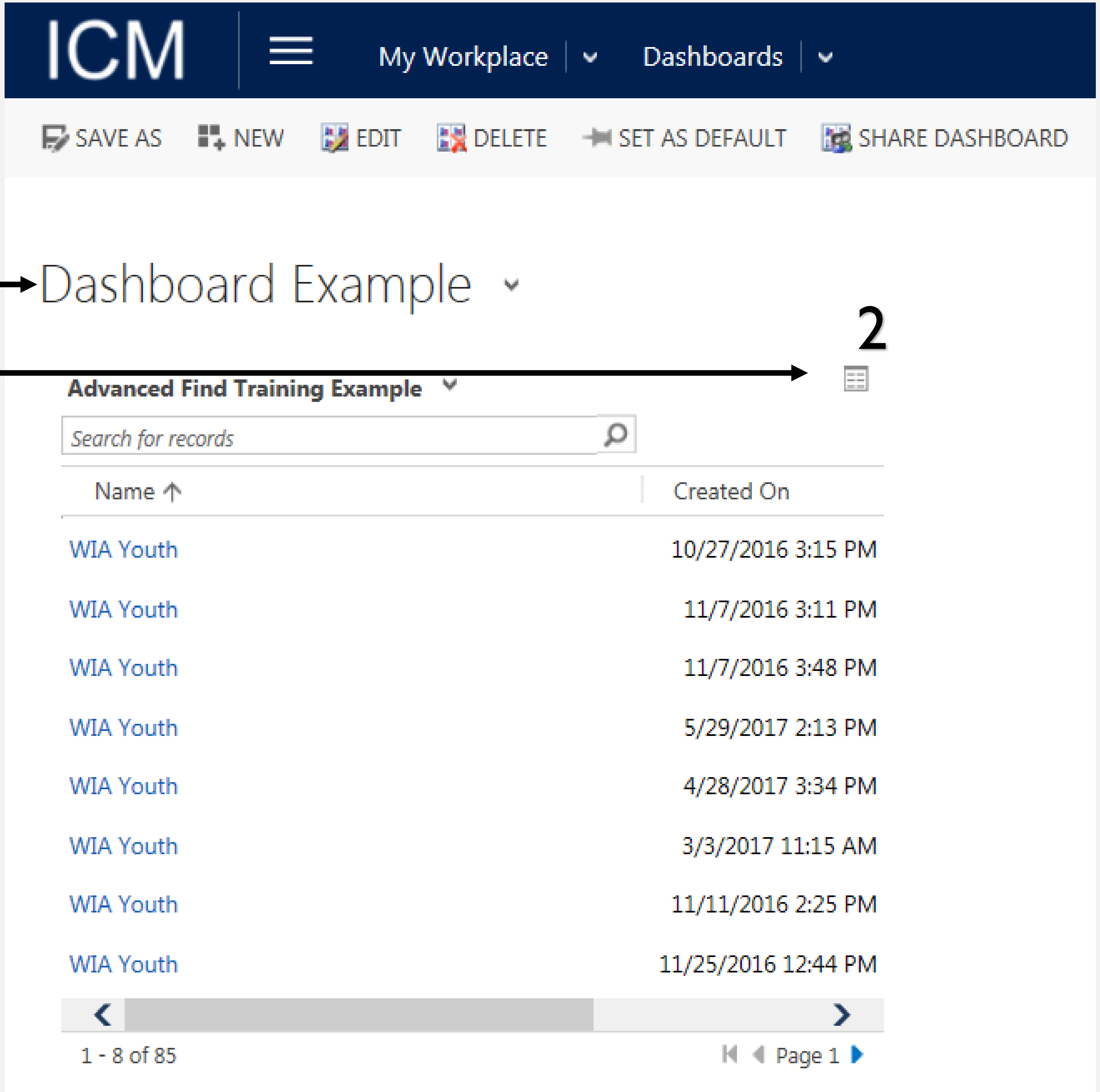
2. Select Record Type (for this example, Enrollment), then → select the saved view you wanted included in the dashboard

3. Then name your dashboard → SAVE and CLOSE



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 END

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