

## Advance Lookups – Expert Mode

### Overview

In addition to existing methods of looking up data, lookups can be performed in “Expert Mode.” To turn on Expert Mode, select the ‘Switch to Expert Mode’ option from the Actions list in the Lookups Application Header.

In Expert Mode, the data fields have additional information displayed, as indicated by the circled and numbered below:

	1	2	3	4
Last/Org	+ 'Sounds Like'	Begins with		
First	+ Begins with			
Middle	+ Begins with			

Each numbered item above provides additional flexibility in fine-tuning your criteria to perform a lookup, as described below:

1. The '+' allows you to enter multiple rows of criteria for the same attribute. When you click the '+' sign, another row, with the same fields and operators, is added to your criteria display. Figure 13 shows the result of clicking '+' on Class.
2. The '(' allows you to 'nest' your query and specify how the criteria are grouped for the query. Please note its use, along with ')'.  
3. The ')' allows closure of the '(' to complete the expression for your query.
4. 'And' and 'or' operators are necessary to identify if the rows with your criteria are presenting a range of information (and) or are mutually exclusive of each other (or). For example, if you want to present a range of dates between which you want to search on Class, you would join the rows with 'and', like Class >= 1999 AND <= 2005

In this query, you are specifying the lower and upper limits of your date range:

School	+ =	(All)		
Class	+ >=	( 1999	and	
Class	+ <=	2005 )		
Solicit Cntrl	+ =	(All)		

You might also use 'and' to exclude a range of numbers, or even join several ranges, which use 'and' by 'or'. Be careful, though. The more complex your lookup, the more opportunities you have for introducing an error in the logic.

To make the distinction between how using 'and' vs. 'or' can change the outcome of your lookup, let's take the same criteria as shown above and, instead of using 'and', use 'or'. Your lookup would then be: Class >= 1999 OR <= 2005

You may already have figured out your results list. Instead of your results being a range of Class Years between 1999 and 2005, you would essentially have all Class Years listed on Advance; the 'or' operator extends the lookup beyond the limits of a range of numbers. In the first part of the expression, all years 1999 and up are included. In the second part, all years from 2005 on down are included. As you can see, this example points out the importance of using care when selecting which operators are the correct operators when establishing criteria.

To use 'or' properly, here's an example. You may wish to find entities from the Class of '99 and the class of '05. For this query, your first row and second row, separated by 'or' are specific by stating: Class = 1999 OR Class = 2005

In this query, you are identifying two distinct Class years:

School	+	=		(All)			
Class	+	=	(	1999		or	
Class	+	=		2005	)		
Solicit Cntrl	+	=		(All)			