EMRS Quick Start Guide for Advanced Find and Personal Views

United States Department of Agriculture

Advanced Find and Personal Views

EMRS uses views to display records in a grid. Each entity (for example, Investigations, Traces, or Rotations) in EMRS has a variety of pre-defined views that can be used to display records in the grid.

You may need to search for and display entity records differently than the available pre-defined views. **Advanced Find** is used to create new queries to search for and display records as you need them. Advanced find is available in every entity in EMRS.

Advanced find queries can be saved as **Personal Views** to appear as re-usable view options in the entity grid. A personal view can be set as your default view so that it displays first when you navigate to an entity. Personal views can be shared with other users.

All EMRS users can use advanced find and create personal views. The information that displays in a personal view is based on the user's access (for example, the user's state). If a view is shared, the new user will only see information based on his/her access in EMRS.

Advanced Find and Personal Views

Advanced find and personal views are available in every EMRS entity. Advanced find provides powerful search capabilities. You can save advanced find queries as personal views.

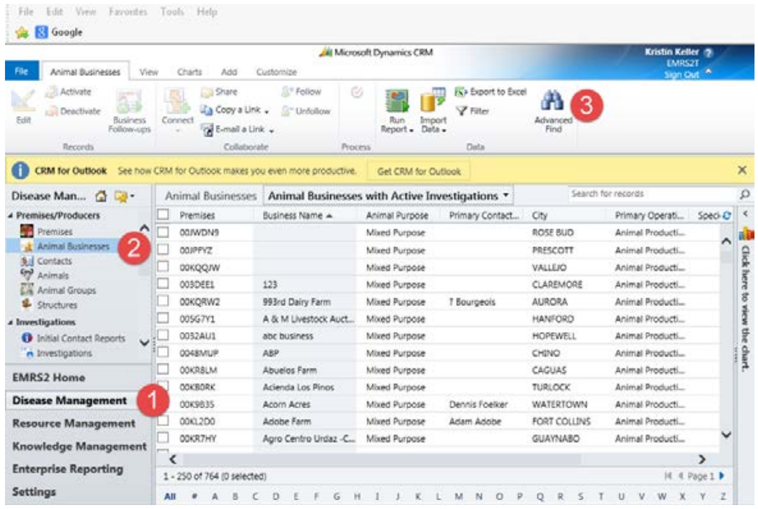
Advanced Find and Personal Views Tasks

1. Create a New Advanced Find Query and Save as a Personal View

Advanced find is available in every entity in EMRS. To create an advanced find query, navigate to the desired entity. *Note: the steps below are an example; use the same steps within any entity to create advanced finds and personal views for that entity. The example creates a personal view to display Animal Businesses in a specific state, with active Investigations.*

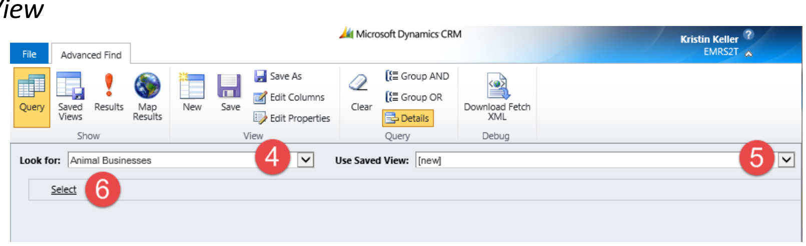
1) Select application area (Example: Disease Management).
2) Select entity (Example: Animal Businesses.)
3) Select Advanced Find in the ribbon.

Advanced Find



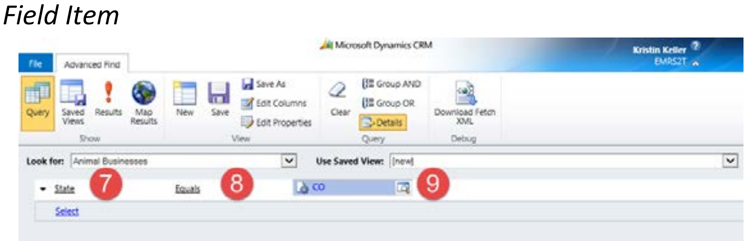
4) Advanced Find Query will open. Because advanced find was accessed from Animal Businesses, **Look for** populates with Animal Businesses. The entity that appears in the Look for field is the entity that is the basis for the advanced find query and personal view – the records that will be searched and displayed are from this entity.
5) In **Use Saved View**, use the drop-down to select New.
6) Hover over Select to open the drop-down.

New View



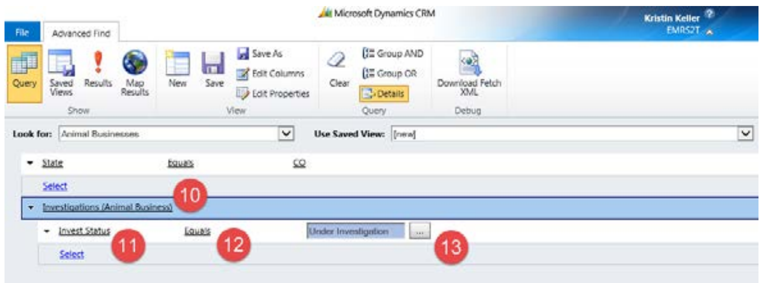
7) Items in the drop-down are listed as **Fields** and **Related**. Fields are the fields that appear on the selected entity form. Related are fields that do not appear on the selected entity form, but have a relationship to that entity. Use the drop-down to select a **field** item to add to your query (Example: State). *Note: See steps 10 – 13 for adding an item that is related to the entity.*
8) Use the drop-down to select the action for your query (Example: Equals).
9) Hover over Enter Value and use the look-up or "select values" to select the value for your query (Example: CO).

Add Field Item



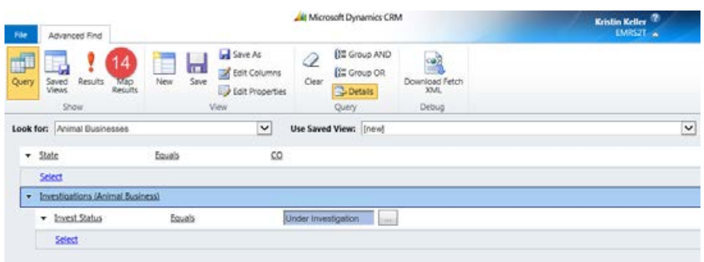
10) You can add related items to your query. Hover over Select and use the drop-down to select the related item you are including in your query (Example: Investigations (Animal Businesses). *Note: Investigations is not a field on the Animal Businesses form, but it is related to Animal Businesses, so it appears in the related section of the drop-down. See steps 7 – 9 above for adding an item that is a field on the entity form.*
11) Beneath your selection, hover over Select and use the drop-down to select a field on the related item (Example Invest Status).
12) Use the drop-down to select the action for your query (Example: Equals).
13) Hover over Enter Value and use the look-up or “select values” to select the value for your query (Example: Under Investigation).

Add Related Item

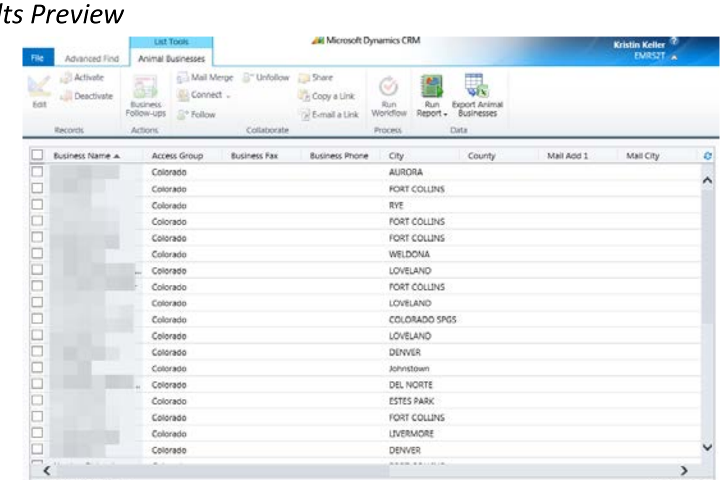


14) Continue adding items to your query as desired. When you have added all your items, select Results in the ribbon. This will give you a preview of the records your query is returning.

Select Results

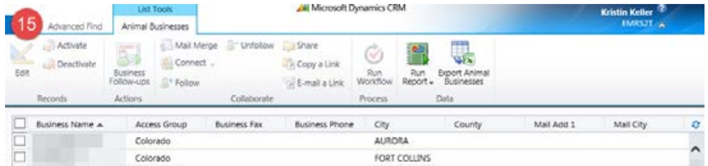


Results Preview



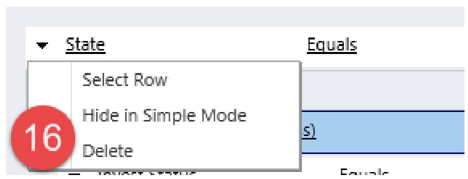
15) Select the Advanced Find tab to return to the advanced find query screen.

Return to Advanced Find Query



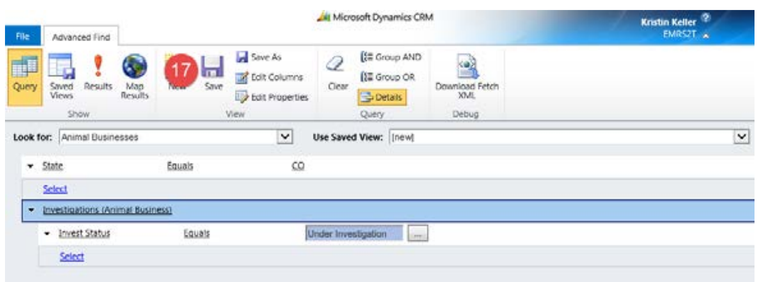
16) If necessary, add or delete items in your query. Add more items following the above steps. To delete an item from a query, select the down arrow next to the item and select delete.

Delete Query Item



17) When you are satisfied with the **items** that are included in your query, select Save in the ribbon. *Note: you can edit how the query results display in the grid view (see Section 2, p. 5).*

Save View

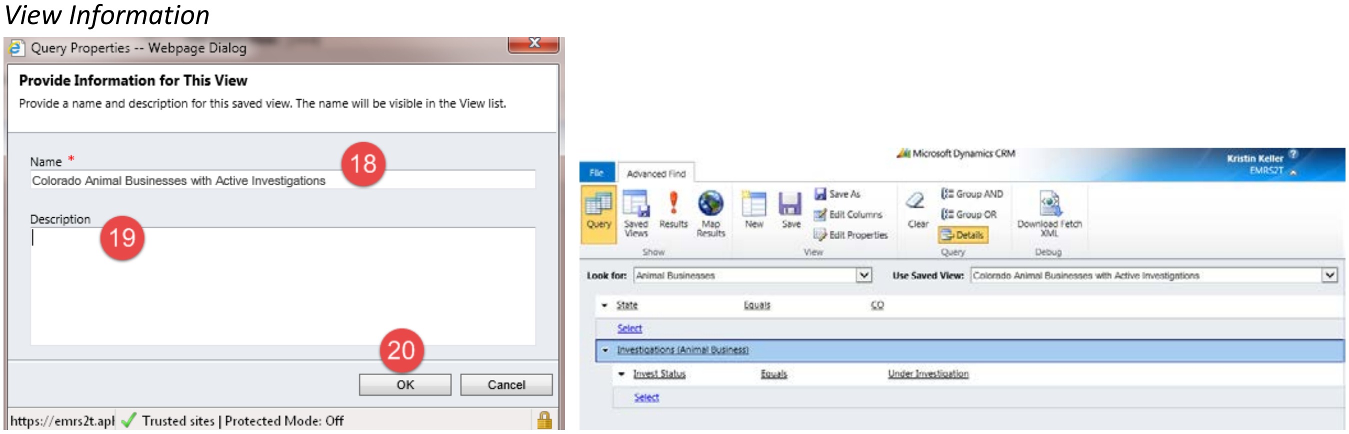


18) Enter a name for the view.

19) Enter a description, if desired.

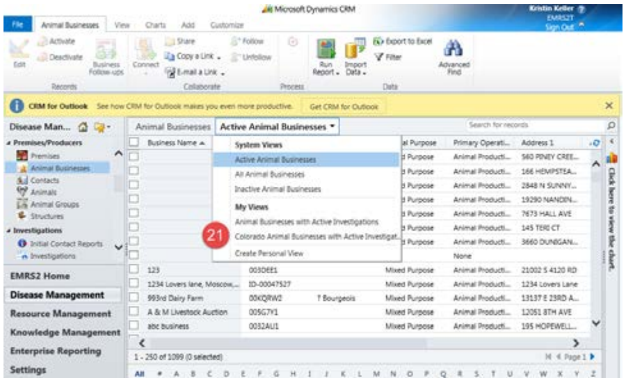
20) Select OK.

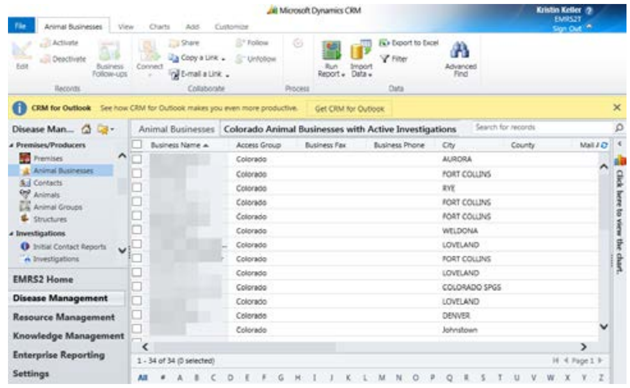
View Information



21) When you navigate to the entity in EMRS, the saved view will appear in the view drop-down for the grid, under My Views. Select the view to see the results in the grid.

Select Personal View



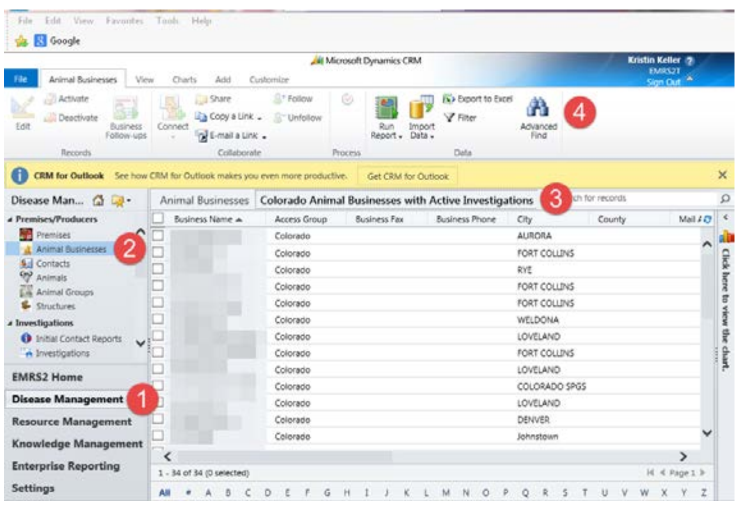


2. Edit Columns in a Personal View

When you create a personal view, you can edit the columns in the view. This will change the way the records display in the view grid. To edit columns, navigate to the entity with the personal view you want to edit.

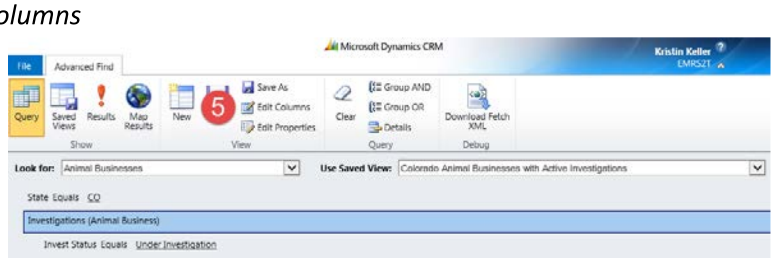
1) Select application area (Example: Disease Management).
2) Select entity (Example: Animal Businesses.)
3) Use the grid view drop-down to select the personal view you want to edit (Example: Colorado Animal Businesses with Active Investigations).
4) Select Advanced Find in the ribbon.

Personal View



5) The Advanced Find Query will open. Select Edit Columns in the ribbon.

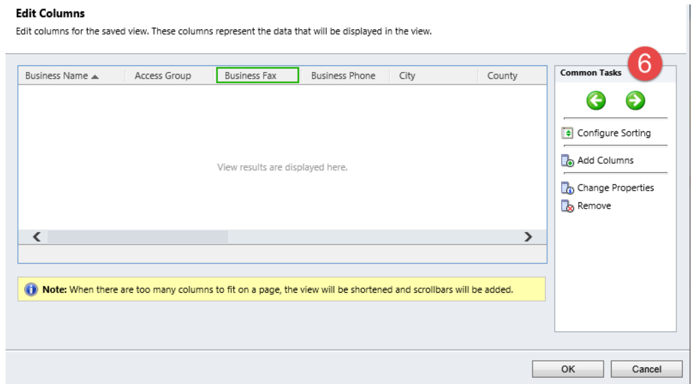
Edit Columns



6) The Edit Columns box will open. Common tasks include:

- Remove columns (p. 6)
- Add columns (p. 7)
- Move columns (p. 8)
- Configure sorting (p. 9)
- Change properties of a column (p. 10)
- View and save column edits (p. 11)

Edit Columns

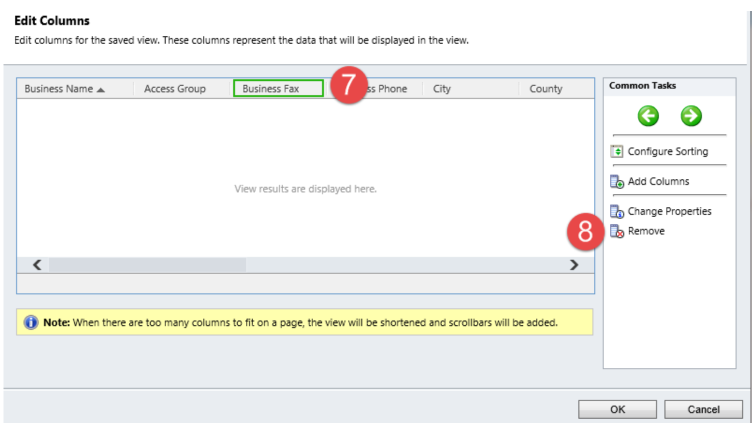


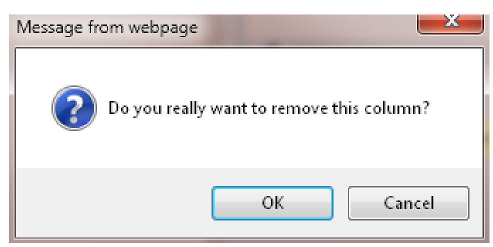
Remove Columns

The results of your personal query may display columns that you do not need. You can delete these unwanted columns.

7) In the Edit Columns box, select a column that you want to remove from the display (Example: Business Fax).
8) Select Remove. Select OK in the pop-up.

Remove Columns





Continue selecting and removing until all unwanted columns are removed from the view.

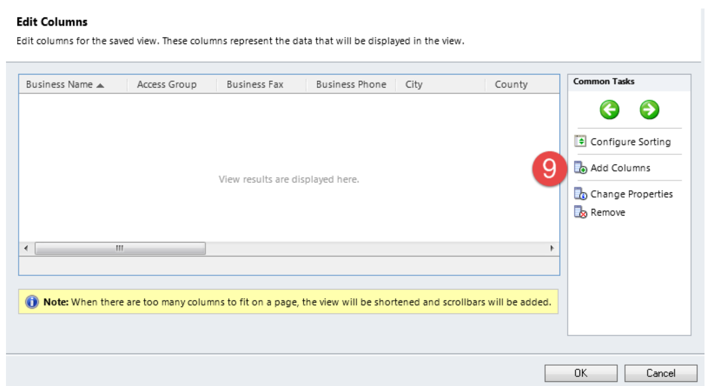
Remove Columns

Add Columns

The results of your personal query may not display all the columns you want to see. You can add columns to the view. You can add columns for fields in the view entity and columns for fields in related entities.

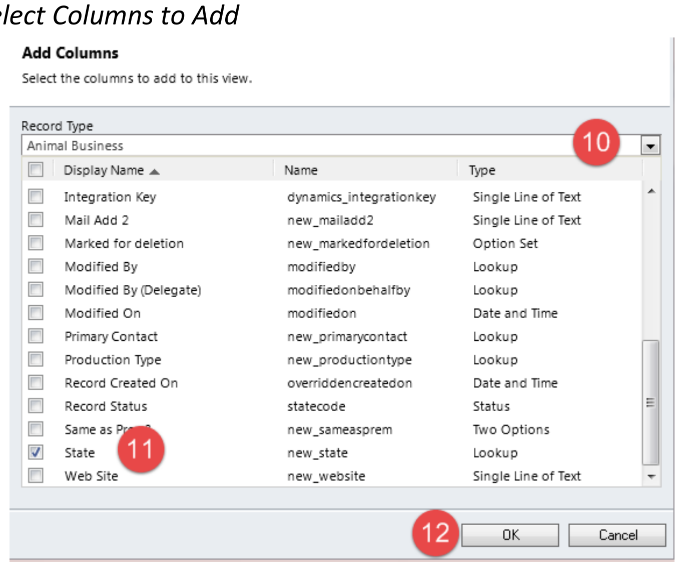
9) In the Edit Columns box, select Add Columns.

Add Columns



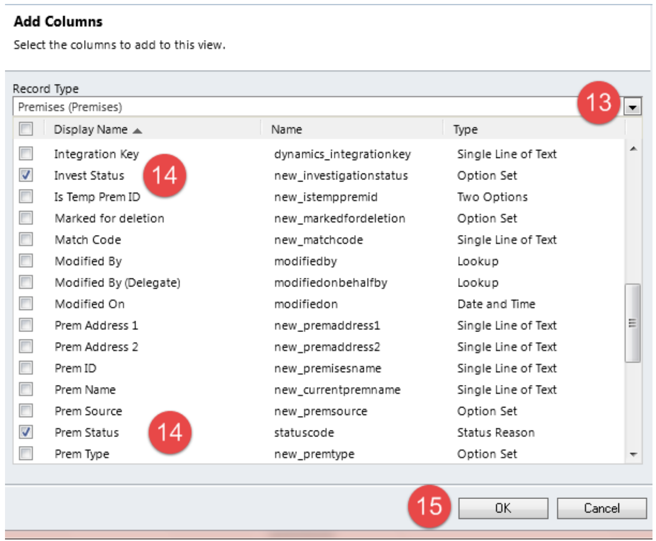
10) The Add Columns box will open. The Record Type will display as the view entity (Example: Animal Business).
11) Select any columns you want to add (Example: State).
12) Select OK.

Select Columns to Add

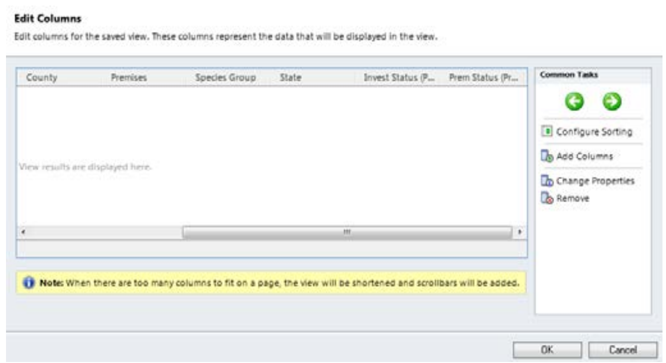


13) If you want to add columns from a related entity, use the drop-down to select the record type (Example: Premises).
14) Select any columns you want to add (Example: Invest Status, Prem Status).
15) Select OK.

Add Columns from a Related Entity



Columns Added



Move Columns

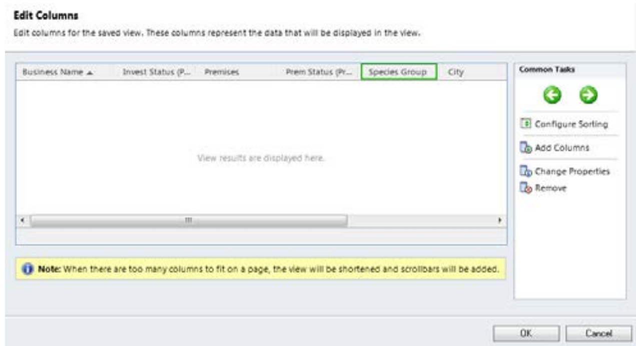
The results of your personal query may not display all the columns in the order you want. You can move columns.

16) In the Edit Columns box, select the column you want to move (Example move State next to County).
17) Select the Left and Right arrows to move the column.

Move Columns

Continue moving columns until all columns are as you want them to display.

Columns Moved

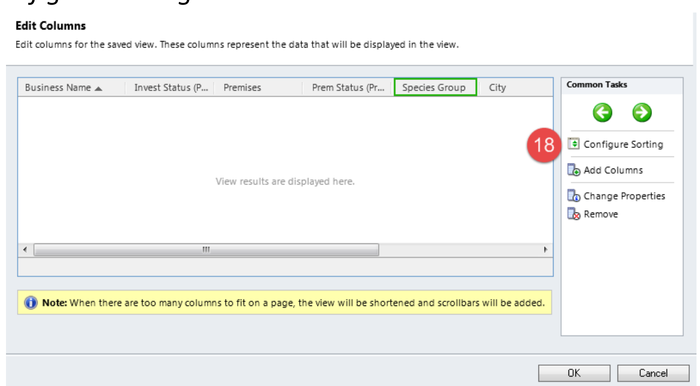


Configure Sorting

The results of your personal query will sort the view by a default column. You can change the view to sort by a different column. *Note: you can also change the sort column on the fly when you are in the view grid, but this change is not saved.*

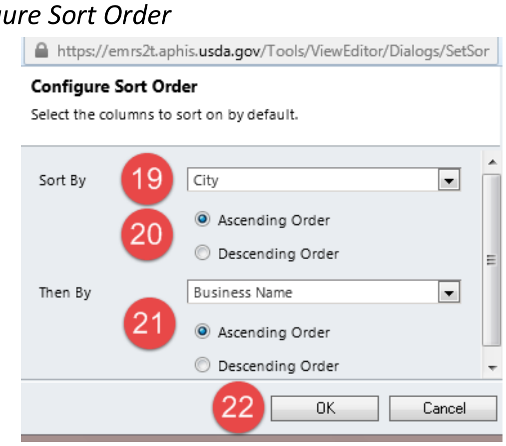
18) In the Edit Columns box, select Configure Sorting.

Configure Sorting



19) In the Configure Sort Order box, use the drop-down to select the column to Sort By.
20) Use the radio buttons to select ascending or descending order.
21) You can also specify a secondary column to sort by.
22) Select OK.

Configure Sort Order

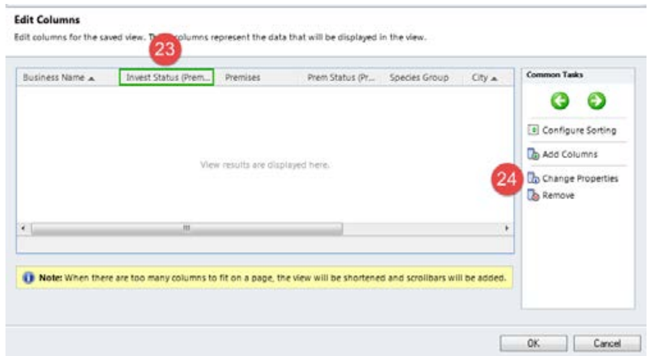


Change Properties

The results of your personal query will display columns at a designated width. You can change width of the columns. *Note: you can also change the width of columns on the fly when you are in the view grid, but this change is not saved.*

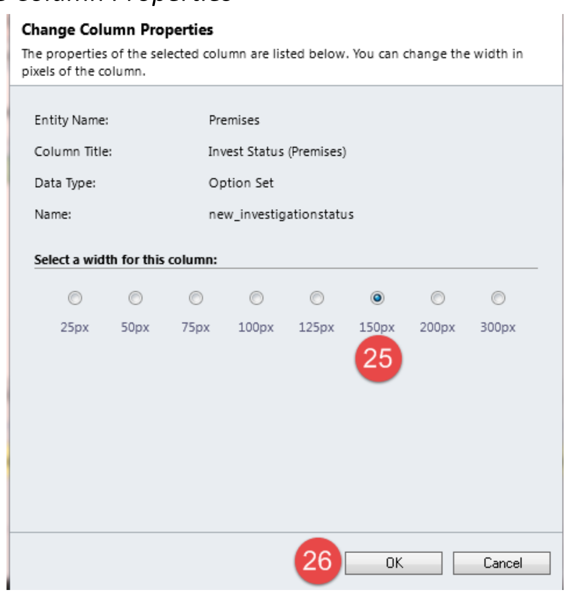
23) In the Edit Columns box, select the column that you want to change.
24) Select Change Properties.

Change Properties



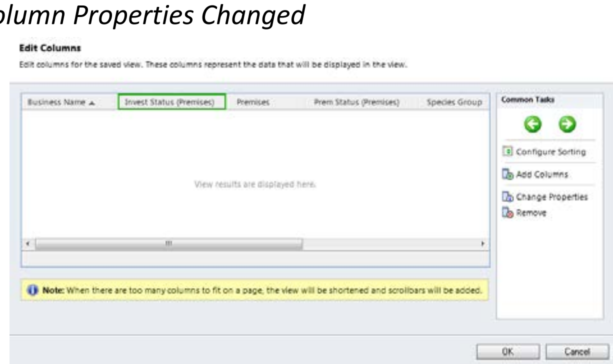
25) In the Change Column Properties box, select the new width for the column.
26) Select OK.

Change Column Properties



Continue changing column properties until all columns are as you want them to display.

Column Properties Changed

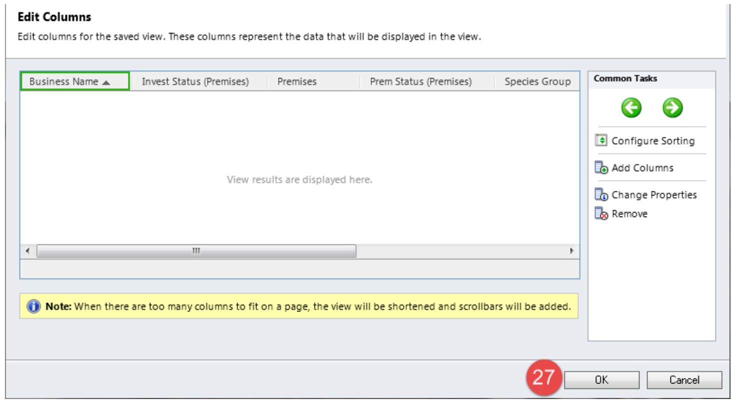


View and Save Column Edits

When you have completed your changes, you can review and save your edits.

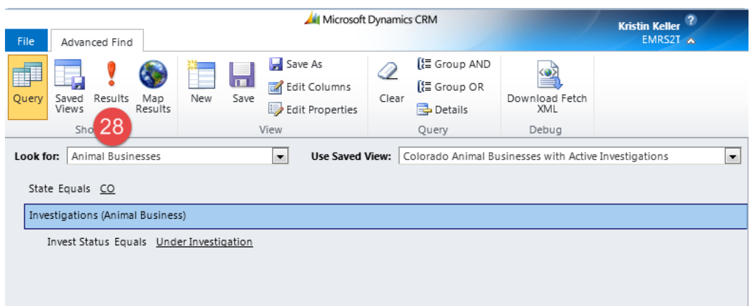
27) When you have finished editing columns, select OK in the Edit Columns box.

Complete Column Edits



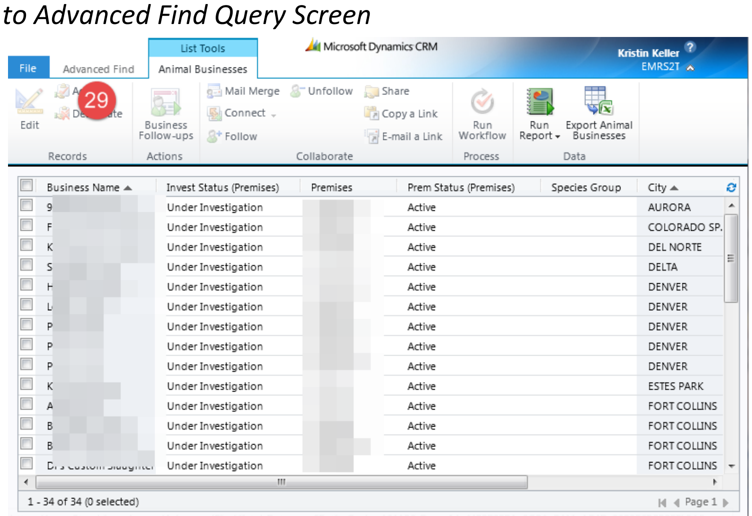
28) Select Results in the Advanced Find Query ribbon to see a preview of your changes.

Preview Results



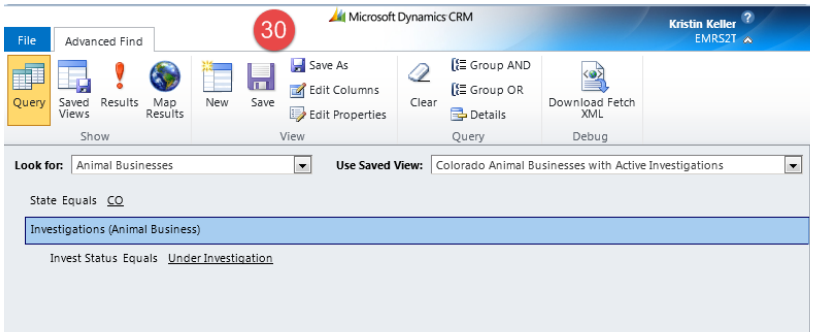
29) Select the Advanced Find tab to return to the Advanced Find Query screen.

Return to Advanced Find Query Screen



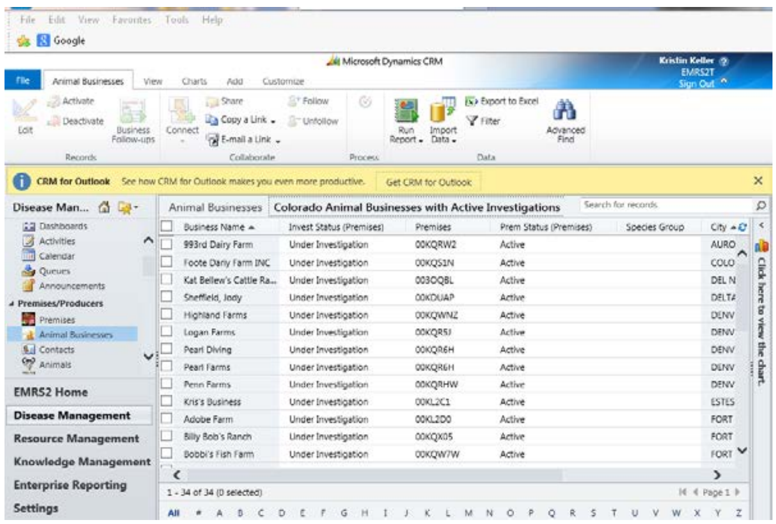
30) If you are satisfied with your view, select Save or Save As to save your changes. Save will replace any previous version of your view. Save As will prompt you to save your edited view with a new name.

Save Changes



When you navigate to the entity and select your personal view, the edited view will display in the grid.

Personal View Displays in Grid



3. Manage Personal Views

You can manage your personal views. You can:

- Set a personal view as the default (p. 12)
- Share a personal view with another user (p. 14)
- Delete a personal view (p. 16)

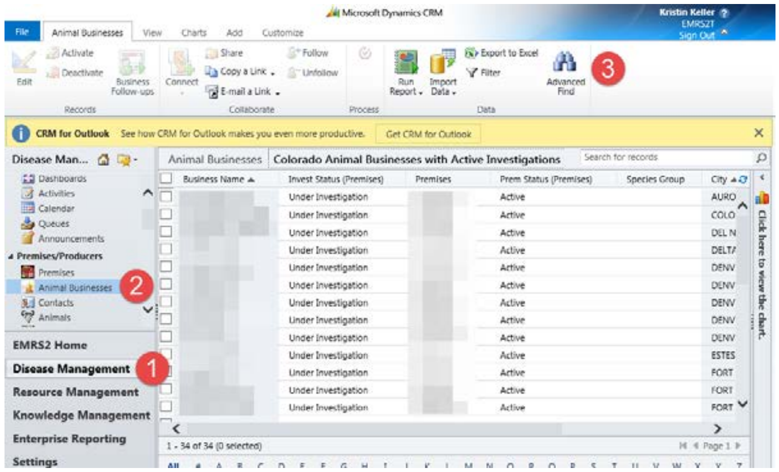
Note: you can also Map the results of an advanced find query or personal view – see the Mapping in EMRS – Quick Start Guide for information on advanced find mapping.

Set a Personal View as the Default

If you want a personal view to display when you navigate to an entity, without having to select it from My Views in the view drop-down, you can set the personal view as the default for the entity. To set a personal view as the default, navigate to the entity for the view. *Note: you can set any system or personal view as the default using the same steps.*

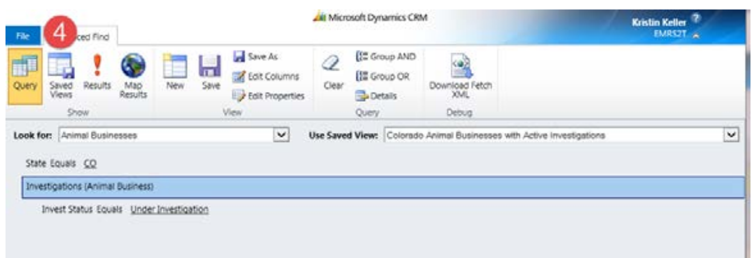
1) Select the application area (Example: Disease Management).
2) Select the entity (Example: Animal Businesses.)
3) Select Advanced Find in the ribbon.

Personal View



4) Select Saved Views in the ribbon.

Saved Views

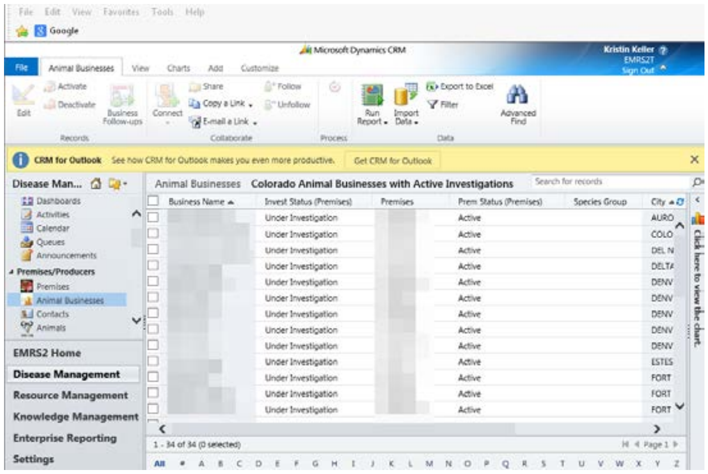


5) The personal views you have saved for the entity will display. Select the view you want to set as default.
6) Select Set as Default View in the ribbon.

Set as Default View

When you navigate to the entity, your selected personal view will display as the default view without having to select it from the view drop-down.

Personal View Displays as Default

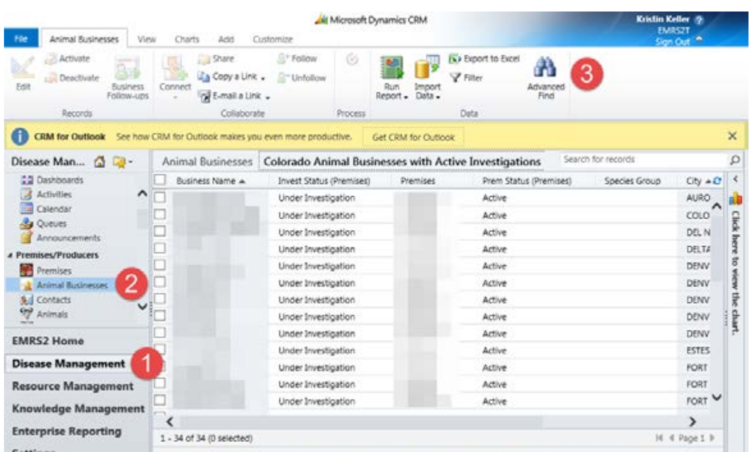


Share a Personal View with another User

If you have created a personal view, you can share the view with other users so that they do not have to re-create the view for themselves. The shared view will only display records that the user has access to in EMRS (for example, for their state). If you include a personal view in a dashboard and want to share the dashboard with others, you will need to share the personal view with the users as well. To share a personal view with another user, navigate to the entity for the view you want to share.

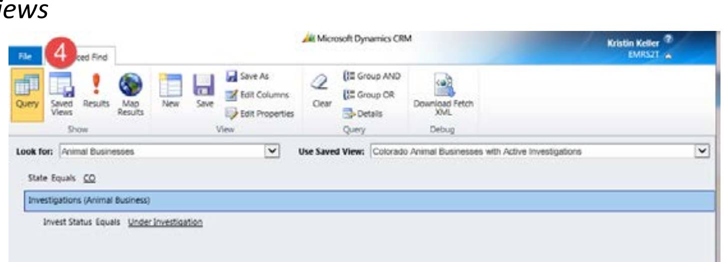
1) Select the application area (Example: Disease Management).
2) Select the entity (Example: Animal Businesses.)
3) Select Advanced Find in the ribbon.

Personal View



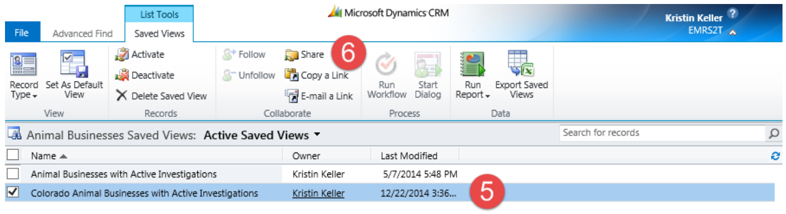
4) Select Saved Views in the ribbon.

Saved Views



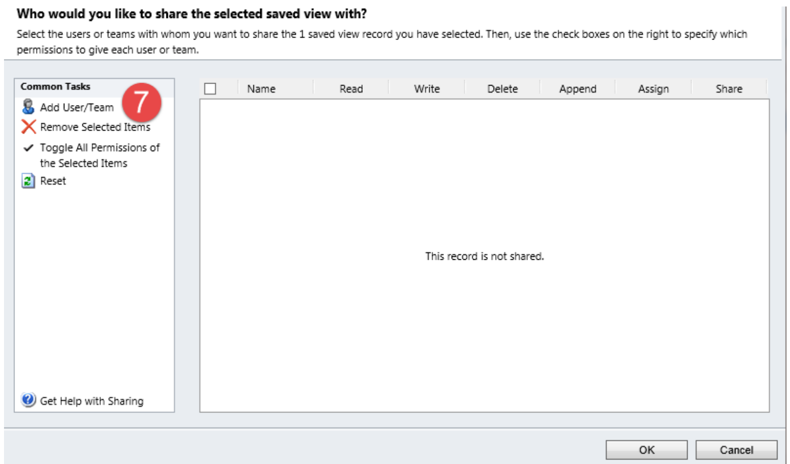
5) All personal views you have saved for the entity will display. Select the view you want to share.
6) Select Share in the ribbon.

Share a View



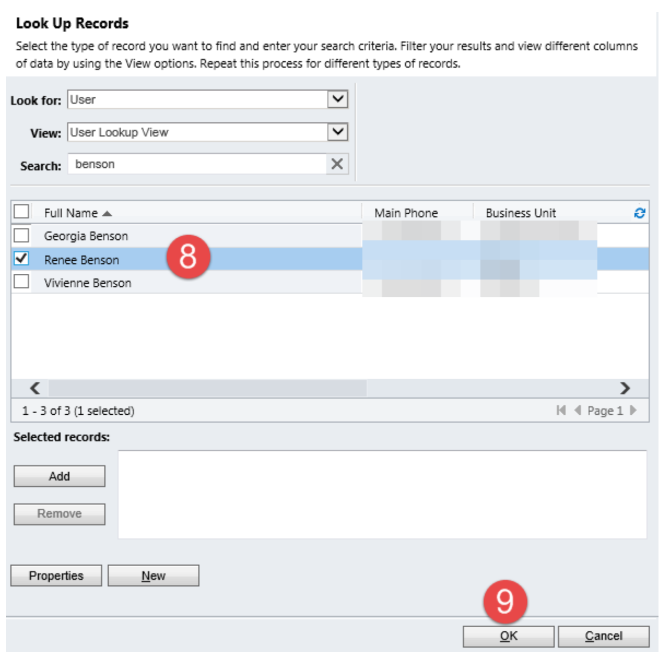
7) Select Add User/Team.

Add User/Team



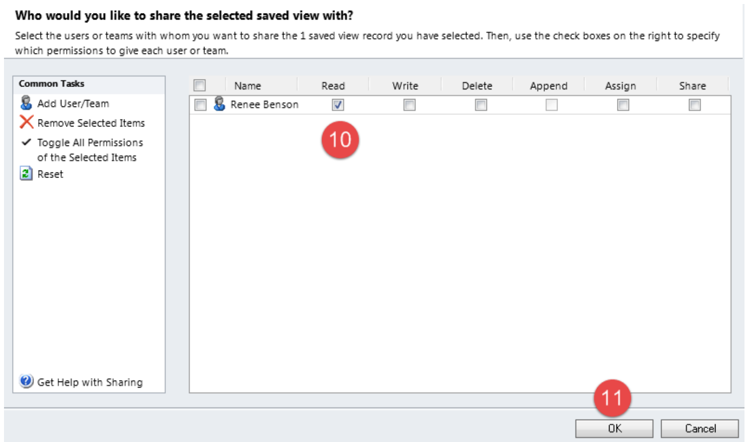
8) Use Look Up Records to select the individual(s) or team(s) with whom you want to share the view.
9) Select OK.

Look Up Records



10) Select the permissions you want to share. ***It is recommended that you share only read privileges for your views.*** The user will be able to see and use the shared view. If they want to edit or share the view with others, they must use Save As to save the view with a new name and then edit or share the new view. This avoids users editing, deleting, or re-sharing your original personal view. If the user no longer needs the view you shared, you can stop sharing the view and it will no longer appear in the user's drop-downs.
11) Select OK.

Permissions



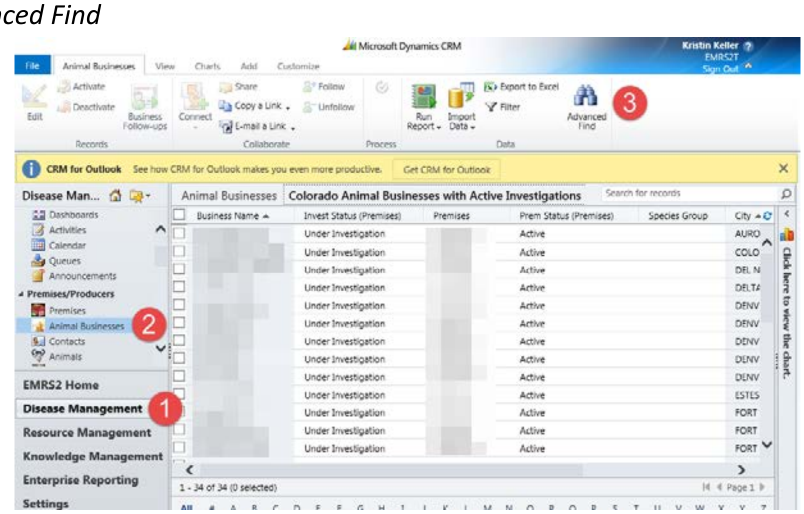
When the user navigates to the entity, the shared view will be in the view drop-down for the entity. The user can set the shared view as the default view if desired.

Delete a Personal View

If you no longer need a personal view you have created, you can delete it. To delete a personal view, navigate to the entity for the view you want to delete.

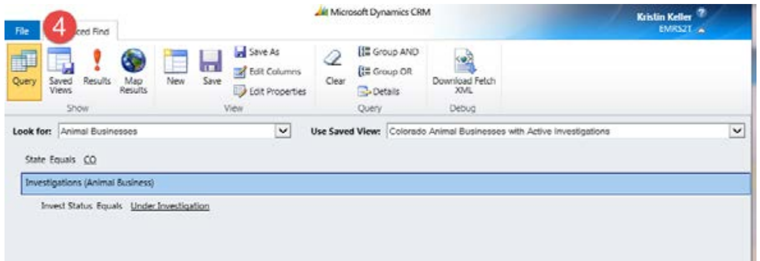
1) Select the application area (Example: Disease Management).
2) Select the entity (Example: Animal Businesses.)
3) Select Advanced Find in the ribbon.

Advanced Find



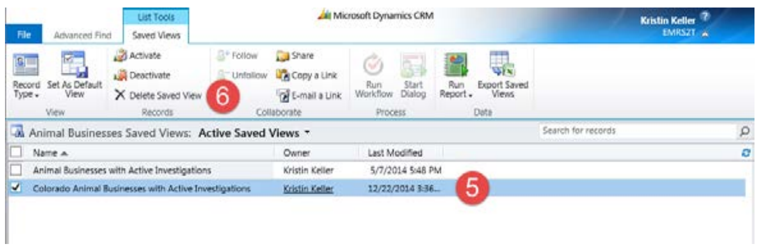
4) Select Saved Views in the ribbon.

Saved Views



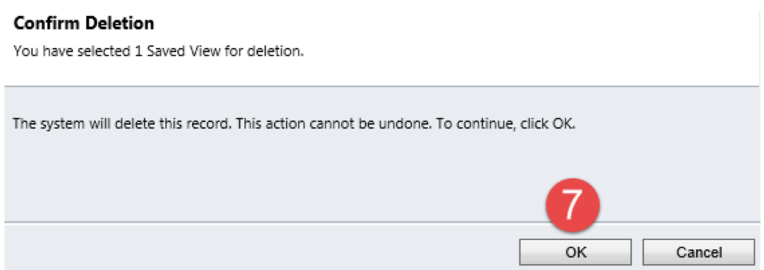
5) All personal views you have saved for the entity will display. Select the view you want to delete.
6) Select Delete Shared View in the ribbon.

Delete Saved View



7) Select OK to confirm the deletion.

Confirm Deletion



The view will no longer appear in your Saved Views list, and it will not appear in the drop down for the entity.

Personal View Removed