Mixing ANDs and ORs in Contract Views Criteria

> Note: This is considered an **advanced** UCM topic, and therefore may not be for all audiences (PG-13), but it will be available for your use should the need arise. **If** you're having troubles getting your Contract Views to give you the intended results, contact iContracts Support for additional help.
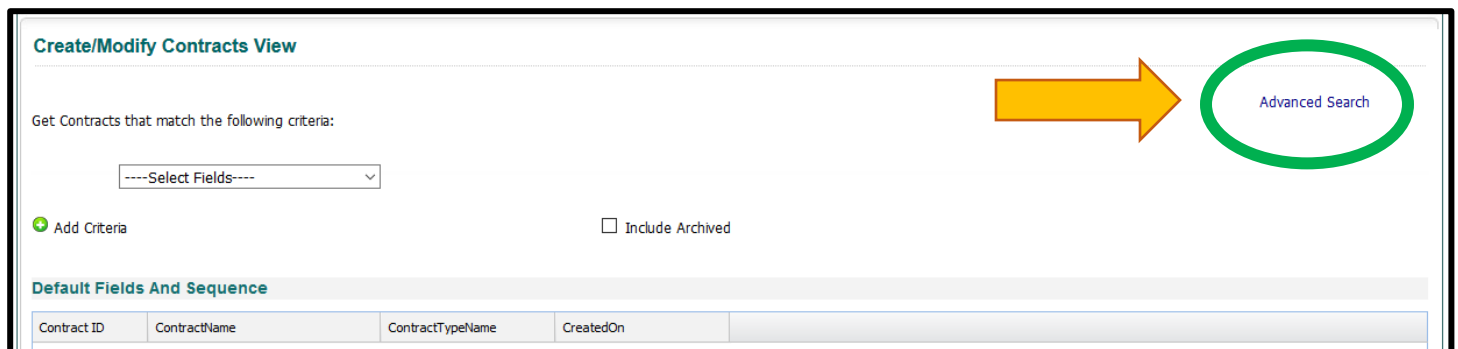>
> We will also be providing some learning seminars within the next couple of weeks to review this new functionality.

In the past, if you were forming a Contract View and wanted to use both ANDs and ORs as "connectors" within the same View, you might get "other than expected" (what some would consider flat-out **wrong**) results since the system wasn't interpreting your wishes correctly.

Now, with the addition of the ability to insert **(**'s and **)**'s – left and right parentheses – you can *help* the system to understand how it should interpret what you're really asking it to show.

Important: No immediate changes are needed. All of your existing Contract Views will continue to work the way they always have without your making any changes.

If you have a need to use the new Advanced Search function, you'll find the words Advanced Search to the right of where you setup your criteria in a Contract View.

On a new View, it toggles the screen from Simple Search:

To Advanced Search:

and back again.

You'll notice the [?] which you can click on for more information on what the Advanced Search is meant for and a clickable "Advanced Search Instructions/Examples" sheet link that will open a PDF document for your review.

If you need to add one or more ('s to the beginning of one of your criteria, you'll click the **+** on the left side of one of the boxes.

If you need to add one or more)'s to the end of one of your criteria, you'll click the **+** on the left side of one of the boxes.

You may click the **+** multiple times if you need more than one **(** or **)**.

Likewise, the **-** will take away one or more ('s or)'s that you no longer need.

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Use **Advanced Search** if your View contains a complex order of operations
such as combining "AND" "OR" criteria.

Example: I want a report of all Construction, Lease, and Service Agreements that are
Active (Stage is Active **OR** Executed) **AND**
have my name on them as either an Owner **OR** Primary Party.

First, I want to report on the Contract Type criteria:

	ContractTypeName ▼	contains ▼	Construction
or ▼	ContractTypeName ▼	contains ▼	Lease
or ▼	ContractTypeName ▼	contains ▼	Service

Then, I want to report on the active contracts within this set:

	StageName ▼	contains ▼	Active
or ▼	StageName ▼	contains ▼	Executed

Finally, I want to look for my name on the contract:

	Owner ▼	= ▼	My Name
or ▼	PrimaryParty ▼	= ▼	My Name

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With this new enhancement, put parentheses (and) around each of these *sets* and use the "**AND**" operator:

+ (–	ContractTypeName ▾	contains ▾	Construction	+ –
or ▾				
+ –	ContractTypeName ▾	contains ▾	Lease	+ – remove
or ▾				
+ –	ContractTypeName ▾	contains ▾	Service	+) – remove

and ▾

+ (–	StageName ▾	contains ▾	Active	+ – remove
or ▾				
+ –	StageName ▾	contains ▾	Executed	+) – remove

and ▾

+ (–	Owner ▾	contains ▾	My Name	+ – remove
or ▾				
+ –	PrimaryParty ▾	contains ▾	My Name	+) – remove