

## 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.

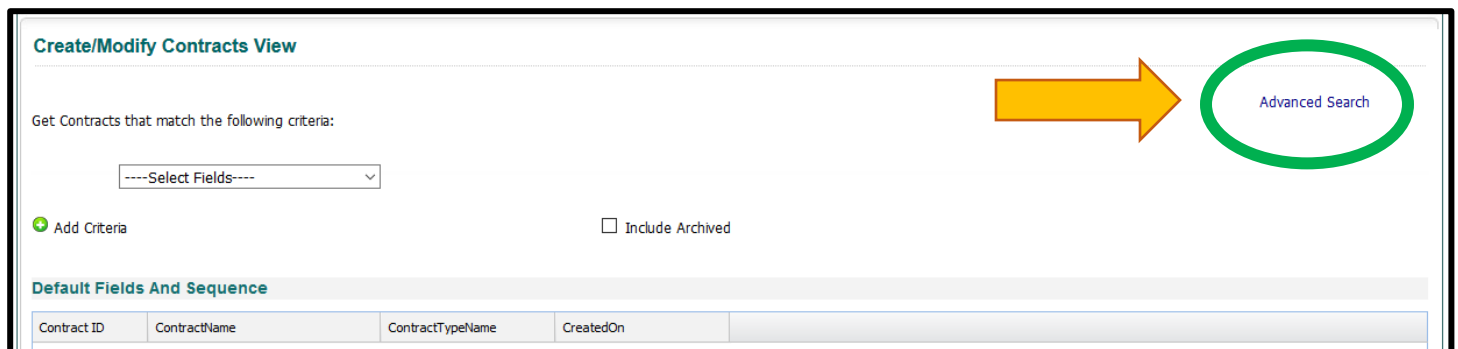
We will also be providing some learning seminars within the next couple of weeks to review this new functionality.

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.



**Create/Modify Contracts View**

Get Contracts that match the following criteria:

----Select Fields----

+ Add Criteria ☐ Include Archived

**Default Fields And Sequence**

Contract ID	ContractName	ContractTypeName	CreatedOn
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On a new View, it toggles the screen from Simple Search:

The screenshot shows the 'Create/Modify Contracts View' interface. At the top, it says 'Get Contracts that match the following criteria:'. Below this is a dropdown menu labeled '----Select Fields----'. To the right of the dropdown is a link labeled 'Advanced Search'. Below the dropdown are two buttons: a green '+' button labeled 'Add Criteria' and a checkbox labeled 'Include Archived'. At the bottom, there is a section titled 'Default Fields And Sequence' with a table containing the following columns: Contract ID, ContractName, ContractTypeName, CreatedOn, and an empty column.

To Advanced Search:

The screenshot shows the 'Create/Modify Contracts View' interface in Advanced Search mode. The text 'Get Contracts that match the following criteria: [?]' is followed by a link labeled 'Advanced Search Instructions/Examples'. To the right of this is a link labeled 'Simple Search'. Below the text are two input boxes, each with a green '+' button on the left and a green '-' button on the right. Below the input boxes are two buttons: a green '+' button labeled 'Add Criteria' and a checkbox labeled 'Include Archived'. At the bottom, there is a section titled 'Default Fields And Sequence' with a table containing the following columns: Contract ID, ContractName, ContractTypeName, CreatedOn, and an empty column. The annotations (green circles) highlight the '+' and '-' buttons on the input boxes, the 'Advanced Search Instructions/Examples' link, and the 'Simple Search' link.

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:

The image shows a query builder interface with three distinct groups of criteria, each enclosed in a purple rounded rectangle. Each group contains two criteria connected by an 'or' operator. The groups are connected to each other by 'and' operators, which are circled in red. Each criterion is enclosed in a green box containing a plus sign, a field name, a dropdown menu, the word 'contains', another dropdown menu, a value, and a minus sign. The first group has criteria for 'ContractTypeName' containing 'Construction' and 'Lease'. The second group has criteria for 'StageName' containing 'Active' and 'Executed'. The third group has criteria for 'Owner' containing 'My Name' and 'PrimaryParty' containing 'My Name'. Each criterion has a 'remove' link to its right.

Group 1:

- ContractTypeName contains Construction
- ContractTypeName contains Lease

Group 2:

- StageName contains Active
- StageName contains Executed

Group 3:

- Owner contains My Name
- PrimaryParty contains My Name