

Advanced Finds/Searches

Introduction

One of the most dramatic and powerful features of CDM+ is the Advanced Find interface found throughout the program. The Advanced Find allows you to identify a specific group of records (people, ledger entries, contributions, attendance, etc.) to be displayed in a window or printed on a report. Specifically, you can:

- Find information by searching multiple fields at once
- Combine finds from multiple programs
- Easily save and reuse advanced finds throughout CDM+
- Build quick listing reports of information
- Enhance your ministry

NOTE: The terms “Advanced Find” and “Advanced Search” will often refer to the same interface in CDM+. However, “Advanced Search” tends to refer to the full find (primary find plus any related finds), and it also is used on reports to complement “Standard Search”.

There are several components to the Advanced Find. This course will begin with a brief overview of the fundamentals of finding data in CDM+, and then build on those fundamentals to introduce the ideas of Boolean searching, sub-grouping, and expanding your finds across related records. Don't worry if these terms seem overly technical; they are all easy-to-understand concepts and this course will bring you up to speed on them all. Specifically, you will learn:

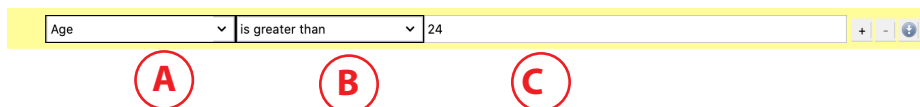
- How to construct basic advanced finds
- How to mix comparisons (and/or) within a single advanced find
- How to pull together finds from multiple programs into a single find
- How to use saved searches
- How to master the advanced find window

By the end of the session, you will be able to quickly and easily target specific sets of information in CDM+, allowing you to put your database to work for you!

Simple Finds

Simple finds are found at the top of many windows in CDM+. At its most basic level, **an Advanced Find is a collection of simple finds**. So, Simple Finds are:

- Made of three parts:
 - Find Field
 - Modifier
 - Criterion
- Used to construct advanced finds, making them:
- Key to understanding advanced finds



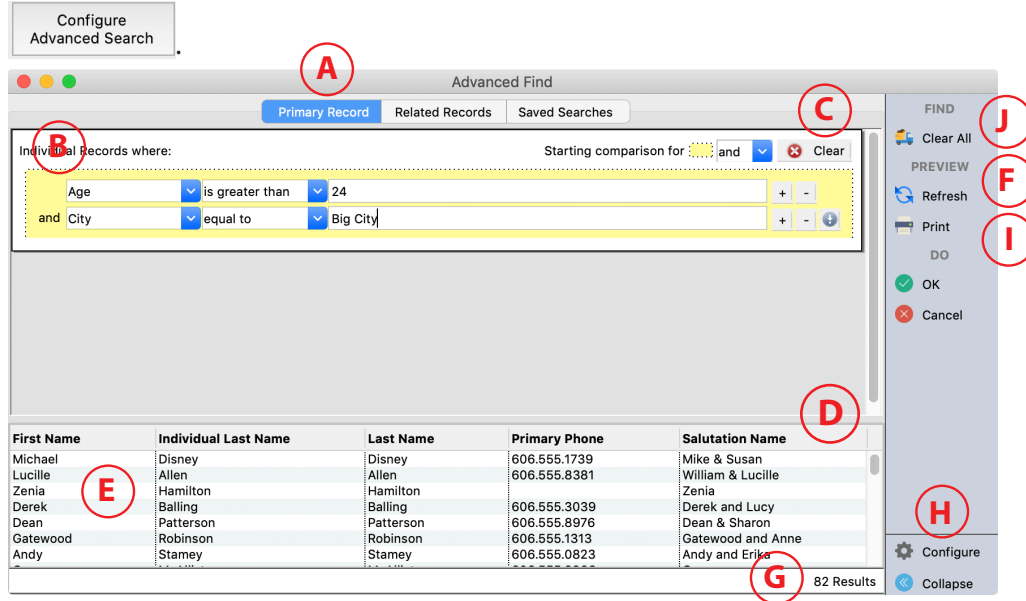
A – Find Field - dependent on the type of record you're finding

B – Modifier - dependent on the find field's type

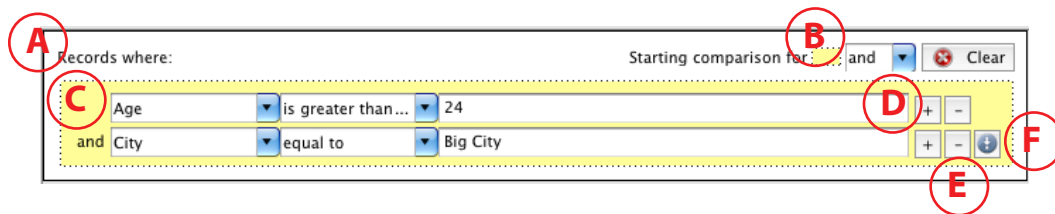
C – Criterion - which is driven by your data and highly dependent on what you want to find

Advanced Find Window

To access the Advanced Find on many windows, click the Advanced Find button Advanced Find. For reports, choose the Advanced Search tab Advanced Search, then click Configure Advanced Search Configure Advanced Search.



- A** – Primary Record, Related Records, and Saved Searches Tabs
- B** – Primary Find
- C** – Clear Primary Find
- D** – Resizable divider between tabs and preview
- E** – Preview of find results
- F** – Refresh preview results
- G** – Number of results in preview
- H** – Window Options for preview
- I** – Print preview results
- J** – Clear Primary Find and Related Record Finds



- A** – Primary Record Type description
- B** – Starting Comparison for master group (C)
- C** – Master Group (yellow box)
- D** – Add Search Line
- E** – Remove Search Line
- F** – Add Sub-Group

Building a Simple Advanced Find

- Create a series of simple searches (field + modifier + criterion)
- Link them using *and* or *or*

Individual Records where: Starting comparison for:

Age	is greater than	24	+	-		
and	City	equal to	Big City	+	-	+

Choosing AND vs. OR

- AND means that results match every simple search
- OR means that results match at least one simple search
- OR generally gives you more results
- AND generally gives you more specific results

Example 1: 24 years old AND living in Big City

Individual Records where: Starting comparison for:

Age	is greater than	24	+	-		
and	City	equal to	Big City	+	-	+

Example 2: 24 years old OR living in Big City

Individual Records where: Starting comparison for:

Age	is greater than	24	+	-		
or	City	equal to	Big City	+	-	+

Using Sub-Groups: Mixing ANDs and ORs

- Sub-Groups allow you to mix ANDs and ORs
- Sub-Groups are like parentheses in algebra
- Sub-Groups can be understood using the concept of “substitution”
- You only need a Sub-Group when you want to change from AND to OR or vice-versa

Let's say we want people who match both these traits:

- *Sing in the choir*
- *24 or 27 years old*

In CDM+ this would be:

Current Church Groups equal to Adult Choir and ?

PROBLEM! There is no single simple search for “age is 24 or age is 27”.

Solution: Use a Sub-Group!

Individual Records where: Starting comparison for

Church Groups	equal to	Adult Choir	+ -
and			
Age	equal to	24	+ -
or	Age	equal to	27

The sub-group allows us to create an entity that is treated like a single search line and can be compared with other search lines. CDM+ will use the results of the sub-group to compare with the other search lines to get the find results list. There are a couple ways to think of sub-groups: parentheses and using substitution.

Sub-Groups as Parentheses

The above search could be written using parentheses, as one does in algebra:

Current Church Groups equal to Adult Choir and (Age equal to 24 or Age equal to 27)

The “order of operations” means that you evaluate the contents of the parentheses first. So, you evaluate the sub-group (blue box) first, and then use its results with the single search line.

Consider this – everything on an advanced find is in a yellow box. So, you can think of boxes equalling parentheses. The example above then becomes:

(Current Church Groups equal to Adult Choir and (Age equal to 24 or Age equal to 27))

Advanced Finds, therefore, are one big sub-group. They are a sub-group of your entire database. See, you’ve been using them all along!

Sub-Groups as Substitution

Another way to think of sub-groups is using substitution. Begin by writing out the advanced find in terms of the colored boxes:

1. = Current Church Groups equal to Adult Choir and
2. = Age equal to 24 or Age equal to 27

To execute the find, get the results of the blue box in line 2, and substitute the blue box in line 1 with those results.

Sub Group Examples

Example 1: In the Choir and 24 or 27 years old

Individual Records where: Starting comparison for

Church Groups	equal to	Adult Choir	+ -
and			
Age	equal to	24	+ -
or	Age	equal to	27

Example 2: 24 years old or is in the choir and is a greeter

Individual Records where: Starting comparison for:

	Age	equal to	24	+	-	+
and						
or	Church Groups	equal to	Adult Choir	+	-	
	Church Groups	equal to	Greeter	+	-	+

This and This or That and That

Individual Records where: Starting comparison for:

	City	equal to	Buffalo	+	-	
or						
or	State	equal to	NY	+	-	+
	or					
and	City	equal to	Lexington	+	-	
	State	equal to	KY	+	-	+

- Begin by adding two Sub-Groups
- Remove the initial search line
- Change the starting comparison
- Enter your search

Related Records

A related record is something that links to your primary record. Some example primary/related record combinations include:

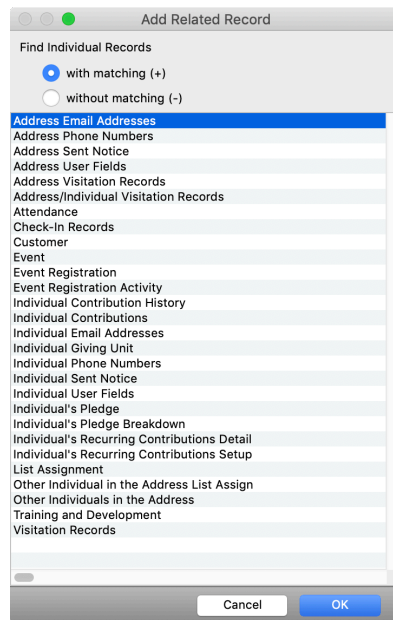
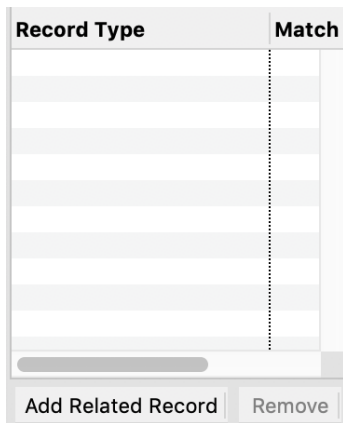
Primary	Related
Individuals	Attendance Other Phones Other Individuals in that household
Giving Unit	Contributions Pledges Attendance
Ledger Entries	Bank Reconciliations Payroll Vendors

There are two ways to add a related record find to your overall advanced find. These are the **matching options**, and are:

- “With matching” means you find results that match the related record find.
 - o Example: *Individuals with Attendance for last Sunday*
- “Without matching” means you find results that don’t match the related record find.
 - o Example: *Capital Campaign Pledges without Giving to the Capital Campaign*

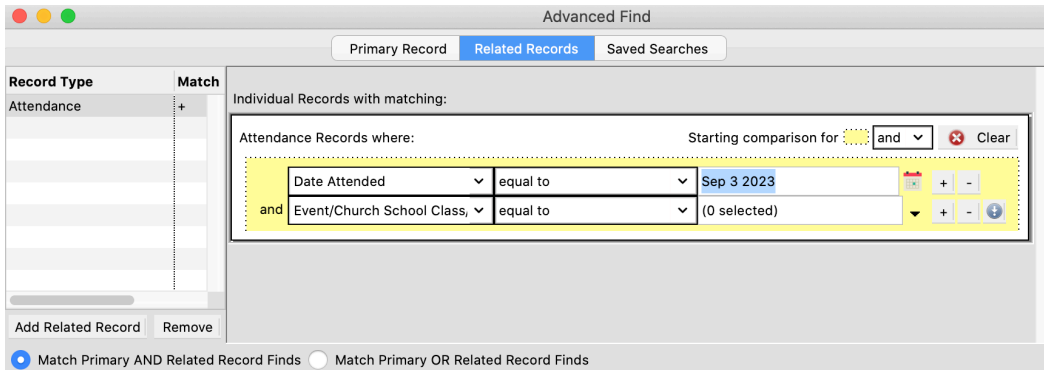
Adding a Related Record Find

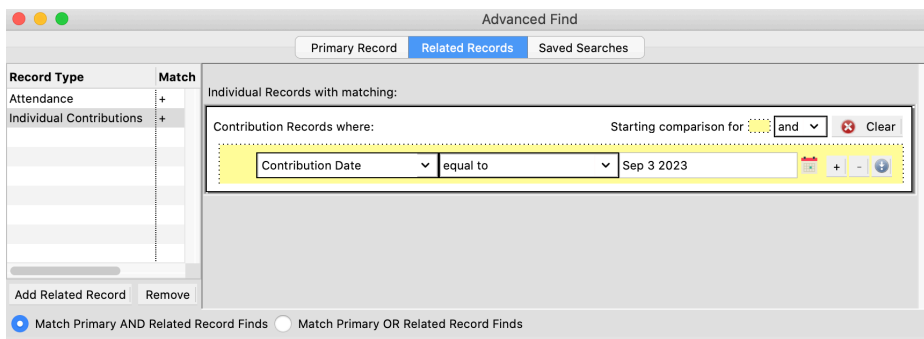
- Switch to the Related Records tab
- Click Add Related Record
- Choose your matching option, the related record, and click OK
- Repeat as needed
- You can add a related record twice; once with each matching option
- All related record finds on the search are used, not just the selected one



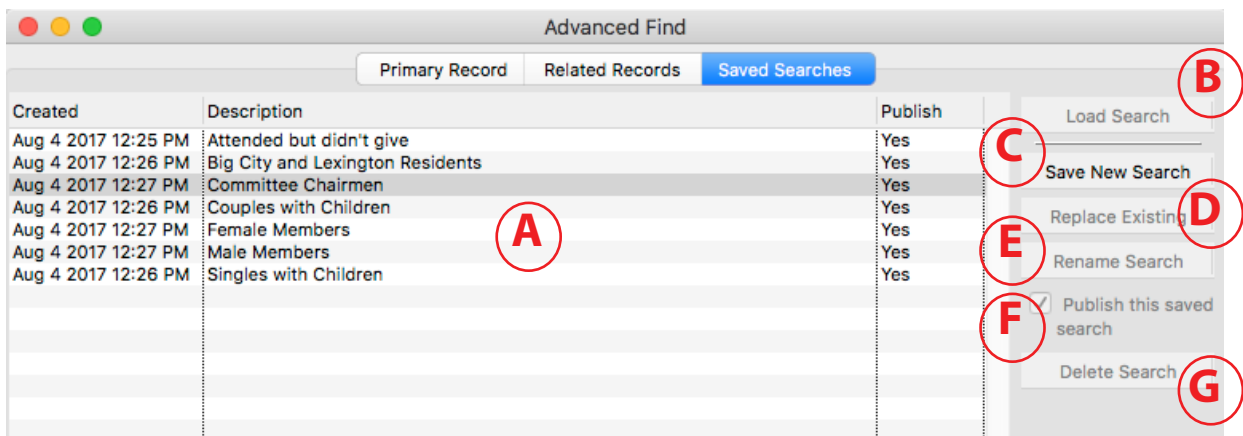
Examples

This advanced find will find individuals who attended last Sunday, but did not give anything. You could further customize this using the primary find to limit it to people that are members of the church, or are in a certain age group.





Double click the + or - under the Match column to change its value.



Saved Searches

- A** – List of saved searches
- B** – Load the selected search
- C** – Saves the search on the Primary and Related Record tabs as a new search
- D** – Replaces the selected search with the current search
- E** – Renames the selected search
- F** – Publishes the search so other CDM+ users can access it
- G** – Deletes the selected search

Publishing and Sharing

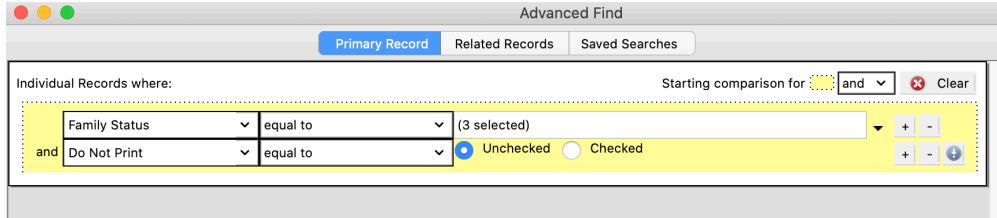
- By default, new searches are published.
- All users can access a published search.
- An unpublished search can only be accessed by the person that creates it.
- Regardless of publish status, only the person that creates a saved search can change it.
- However, you can load someone else's published search, tweak it, and save it as a new one.
- Saved Searches are common across reports and windows; save a search on Individual Records and it will be available on Individual-based reports.

Examples of Advanced Finds

Following are examples of useful Advanced Finds in different CDM+ programs:

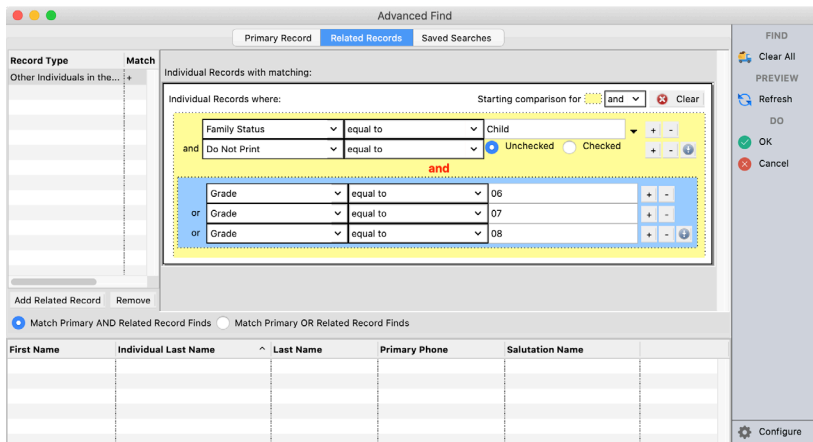
Membership – Parents of Middle Schoolers

► Program ► Membership ► Individual Records ► Advanced Find button



Click on Related Records tab.

Click on Add Related Record button under Record Type and select Other Individuals in the Household.



Contributions – Non-pledging Givers

► Program ► Contributions ► Giving Unit Records ► Advanced Find button

The screenshot shows the 'Advanced Find' window with the 'Primary Record' tab selected. The search criteria are defined as 'Giving Unit Records where: Inactive equal to No'. The 'Starting comparison for' is set to 'and'. There are '+', '-', and 'i' buttons to the right of the criteria field.

Click on Related Records tab.

Click on Add Related Record button under Record Type and select Giving Unit Contribution Records.

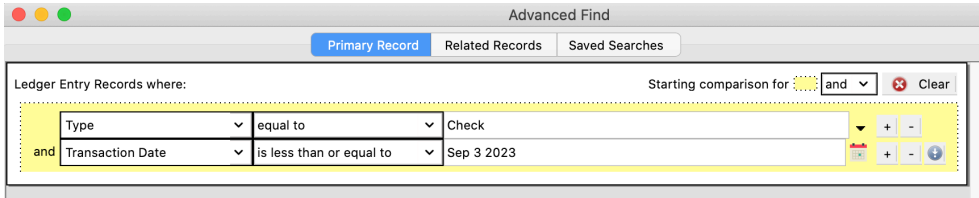
The screenshot shows the 'Advanced Find' window with the 'Related Records' tab selected. The 'Record Type' list on the left includes 'Giving Unit Contribution...' and 'Pledge Records'. The search criteria are updated to 'Giving Unit Records with matching: Contribution Records where: Giving Fund equal to General Fund 2023'. The 'Match' column shows a '+' sign for 'Giving Unit Contribution...' and a '-' sign for 'Pledge Records'. The 'Match' radio buttons at the bottom are set to 'Match Primary AND Related Record Finds'.

Click on Add Related Record button again and select Pledge Records from Record Type.

The screenshot shows the 'Advanced Find' window with the 'Related Records' tab selected. The 'Record Type' list on the left now includes 'Pledge Records' with a '+' sign in the 'Match' column. The search criteria are updated to 'Giving Unit Records with matching: Pledge Records where: Giving Fund equal to General Fund 2023'. The 'Match' radio buttons at the bottom remain set to 'Match Primary AND Related Record Finds'.

Accounting – Outstanding Checks

► Program ► Ledger ► Ledger Entry Records ► **Advanced Find** button



Click on Related Records tab.

Click on Add Related Record button under Record Type and select Bank Reconciliation.

