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:
 - o Find Field
 - o Modifier
 - o 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

	C C	Adv	anced Find	-	
_	Primary I	Record Related Recor	ds Saved Searches	((FIND
	ls where:		Starting compari	son for and V 🔞 Cl	lear
\mathbf{C}			g		PREVIEW
Age	v is greater than	24		+ -	Defrech
		at at			Reliesi
and City	equal to	Big City		+ - (💛 📄 🖶 Print 🌈
					DO
					🖉 ок
					OK Cancel
					OK Cancel
					OK Cancel
					✓ OK⊗ Cancel
					OK OK Cancel
				G	o ok Cancel
rst Name	Individual Last Name	Last Name	Primary Phone	Salutation Name	O OK Cancel
rst Name ichael	Individual Last Name Disney	Last Name Disney	Primary Phone 606.555.1739	Salutation Name	OK Cancel
rst Name ichael cille	Individual Last Name Disney Allen	Last Name Disney Allen	Primary Phone 606.555.1739 606.555.8381	Salutation Name Mike & Susan William & Lucille	OK Cancel
irst Name lichael acille enia	Individual Last Name Disney Allen Hamilton	Last Name Disney Allen Hamilton	Primary Phone 606.555.1739 606.555.8381	Salutation Name Mike & Susan William & Lucille Zenia	O OK Cancel
irst Name lichael ucille enia erek	Individual Last Name Disney Allen Hamilton Balling	Last Name Disney Allen Hamilton Balling	Primary Phone 606.555.1739 606.555.8381 606.555.3039	Salutation Name Mike & Susan William & Lucille Zenia Derek and Lucy	DO OK Cancel
irst Name lichael eria erek ean	Individual Last Name Disney Allen Hamilton Balling Patterson	Last Name Disney Allen Hamilton Balling Patterson	Primary Phone 606.555.1739 606.555.8381 606.555.3039 606.555.8976	Salutation Name Mike & Susan William & Lucille Zenia Derek and Lucy Dean & Sharon	O OK Cancel
irst Name lichael ucille enia erek ean atewood	Individual Last Name Disney Allen Hamilton Balling Patterson Robinson	Last Name Disney Allen Hamilton Balling Patterson Robinson	Primary Phone 606.555.1739 606.555.8381 606.555.3039 606.555.8976 606.555.1313	Salutation Name Mike & Susan William & Lucille Zenia Derek and Lucy Dean & Sharon Gatewood and Anne	DO OK S Cancel

- 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*

h	ndividu	al Records where:		Starting comparison for 🛄 and 🗸	€	3	Clear
	[Age 🗸	is greater than \checkmark	24	+	-	
	and	City 🗸	equal to 🗸 🗸	Big City	+	-	0

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

Ir	ndividu	al Records where:		Starting comparison for 🛄 and 🗸	6	3	Clea	ir
		Age 🗸	is greater than 🗸 🗸	24	+	-		
	and	City 🗸	equal to 🗸 🗸	Big City	+	-	0	

Example 2: 24 years old OR living in Big City

Ir	ndividu	al Records where:		Starting comparison for 🛄 or 🗸	(3	Clear
		Age 🗸	is greater than 🗸 🗸	24	+	-	
	or	City 🗸	equal to 🗸 🗸	Big City	+	-	0

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!

Ind	ividua	al Records where:				Starting comparison for 🗰 and 🥆	~	8	Clear
	ſ	Church Groups	~	equal to 🗸 🗸],	Adult Choir		-	0
						and			
		Age	~	equal to 🗸 🗸	~	24	+	-	
	or	Age	~	equal to 🗸	<u>`</u>	27	+	-	0

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

Individ	ual Records where:					Starting comparison for 🛄 and 🗸		3	Clear
	Church Groups	~	equal to	~	Adult Choir	-	+	-	0
					and				,
	Age	~	equal to	~	24		+	-	
or	Age	~	equal to	~	27		+	-	θ

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

al Records where:				Starting comp	parison for 🧰 and 🕚	-	8	Clear
Age	~	equal to	~	:4		1	+ -	- 0
				and				
Church Groups	~	equal to	~	Adult Choir	-	+	-	
Church Groups	~	equal to	~	Greeter	-	+	-	Θ
	Age Church Groups Church Groups	Age Church Groups Church Groups	Age equal to Church Groups equal to Church Groups equal to	Age v equal to v 2 Church Groups v equal to v church Groups v equal to v church Groups v equal to v equal	Age vequal to 24 Church Groups vequal to vequal to cequal to the formula of the f	all Records where: Starting comparison for []] and vertice Age vertice Age vertice Church Groups vertice Vertice Adult Choir Church Groups vertice Vertice Greeter	Age v equal to v Adult Choir v equal to v Greeter v equal to v o Greeter v equal to v o Adult Choir v equal to v o Church Groups v equal to v o Creeter v	Age v equal to v 24 + - Age v equal to v Adult Choir Church Groups v equal to v Greeter v + -

This and This or That and That

Inc	lividua	Il Records where:		Starting comparison for 🛄 or 🗸] (3	Clear
	Γ	City 🗸	equal to 🗸 🗸	Buffalo	+	-	
	or	State 🗸	equal to 🗸 🗸	NY	+	-	0
				or			
		City 🗸	equal to 🗸	Lexington	+	-	
	and	State 🗸	equal to 🗸 🗸	кү	+	-	•
- 12		••••••					

- 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. • 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

Record Type	Match		Add Related Record
		Find Individu	ual Records
		🗿 with	matching (+)
		with	out matching (-)
		Address Emai	il Addresses
		Address Phon	ne Numbers
		Address Sent	Notice
		Address User	Fields
		Address Visita	ation Records
		Address/Indiv	vidual Visitation Records
		Attendance	
		Check-In Rec	ords
		Customer	
		Event	
		Event Registra	ation
		Event Registra	ation Activity
		Individual Cor	ntribution History
		Individual Cor	ntributions
		Individual Em	ail Addresses
		Individual Giv	ing Unit
		Individual Pho	one Numbers
		Individual Ser	nt Notice
Add Datated Dataset	Deserved	Individual Use	er Fields
Add Related Record	Remove	Individual's Pl	ledge
		Individual's Pl	ledge Breakdown
		Individual's Re	ecurring Contributions Detail
		Individual's Re	ecurring Contributions Setup
		List Assignme	ent
		Other Individu	ual in the Address List Assign
		Other Individu	uals in the Address
		Training and I	Development
		Visitation Rec	cords

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.

Cancel

					Advand	ced Find						
			Primary Record	Re	lated Records	Saved Search	es					
Record Type Attendance	Match +	Individual Re	al Records with matching:									
		Attendance	Records where:			S	tarting comparison for	and 🗸	😢 Clear			
		Dat	Date Attended 🗸 equal to	equal to	~	Sep 3 2023		+ -				
		and Eve	nt/Church School Clas	is, 🗸	equal to	~	(0 selected)	-	+ - 3			
		<u>. </u>										
Add Related Record	I Remove											
O Match Primary A	AND Related R	ecord Finds	Match Primary OR	Relate	ed Record Finds							

• • •				Advanc	ed Find								
			Primary Record	Related Records	Saved Searches								
Record Type	Match	Individual Data											
Attendance	+	Individual Reco	Adual Records with matching:										
ndividual Contributions	+	Contribution R	ecords where:		Starti	ing comparison for 🧰 and 🗸 😵 Clear							
		Contr	ibution Date	✓ equal to	∽ Set	p 3 2023 🗮 + - 🕃							
Add Related Record R	temove												
Match Primary AND I	Related R	ecord Finds 🔵	Match Primary OR I	Related Record Finds									

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

• • •	Advance	ed Find	
	Primary Record Related F	Records Saved Searches	(
Created	Description	Publish	Load Search
Aug 4 2017 12:25 PM	Attended but didn't give	Yes	
Aug 4 2017 12:26 PM	Big City and Lexington Residents	Yes	Save New Search
Aug 4 2017 12:27 PM	Committee Chairmen	Yes	Save New Search
Aug 4 2017 12:26 PM	Couples with Children	Yes	Peplace Existing
Aug 4 2017 12:27 PM	Female Members	Yes	Replace Existing
Aug 4 2017 12:27 PM	Male Members	Yes	Pename Search
Aug 4 2017 12:26 PM	Singles with Children	Yes	Rename Search
			Publish this save
			search
			Delete Search

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

• •				Advanced Find							
			Primary	Record	Related Records	Saved Searches					
Individu	al Records where:					Start	ing comparison for	and 🗸] 🕄	Clear	
	Family Status	~	equal to	~	(3 selected)			-	+	-	
and	Do Not Print	~	equal to	~	O Unchecked	Checked			+	- 0	
L:					-						1

Click on Related Records tab.

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

•••							Auvanceur	ina							-	
				Prima	ry Record	Rela	ated Records Sav	ed Searche	s							FIND
Record Type Other Individuals in t	Match	Indiv	idua	I Records with	matching:										4	Clear All
		Indi	vidu	al Records whe	re:			SI	tarting comparison for 🛄 and	I v	6	эс	lear]	G	Refresh
				Family Status		~	equal to	~	Child	•	+	-				DO
		-	and	Do Not Print		~	equal to	~	O Unchecked 🔵 Checked		+	- 1	0			ок
							a	nd							8	Cancel
				Grade		~	equal to	~	06		+	- 1				
			or	Grade		~	equal to	Ý	07		+	-				
			or	Grade		~	equal to	Ý	08		+	- 6	Ð			
		-														
Add Related Record	Remove															
 Match Primary A 	ND Related F	Record	Fine	ds 🔵 Match P	rimary OR Rel	ateo	d Record Finds									
First Name	Individua	al Last	Nar	me ^	Last Name		Primary Pho	ne	Salutation Name							
															\$	Configure
															4	

Contributions – Non-pledging Givers

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

		Advanc		
	Primary Record	Related Records	Saved Searches)
Giving Unit Records where:			Starti	ing comparison for 🧰 and 🗸 😮 Clear
Inactive v equal to	v	No Yes		+ - 0

Click on Related Records tab.

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

• • •		Advanced Find
		Primary Record Related Records Saved Searches
Record Type Giving Unit Contributio	Match +	Giving Unit Records with matching:
Pledge Records	+	Contribution Records where: Starting comparison for 🗮 and 🔻 😵 Clear
		Giving Fund v equal to v General Fund 2023 v + - 0
Add Related Record	Remove	
 Match Primary AND 	Related R	ecord Finds 🕥 Match Primary OR Related Record Finds

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

		Advanced Find
		Primary Record Related Records Saved Searches
Record Type Giving Unit Contributio	Match +	Giving Unit Records with matching:
Pledge Records	+	Pledge Records where: Starting comparison for and V S Clear
		Giving Fund v equal to V General Fund 2023 + - O
Add Related Record	Remove	
 Match Primary AND 	Related R	ecord Finds O Match Primary OR Related Record Finds

Accounting – Outstanding Checks ► Program ► Ledger ► Ledger Entry Records ► Advanced Find button

••				Advanced Find						
			Primary Record	L	Related Records	Saved Searches				
Ledger	Entry Records where:					Start	ting comparison for 🛄 an	d 🗸	8	Clear
	Туре	~	equal to	~	Check			-	+	-
and	Transaction Date	~	is less than or equal to	~	Sep 3 2023				+	- 0

Click on Related Records tab.

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

				Advanc	ed Find				
			Primary Record	Related Records	Saved Searches				FIND
Record Type Bank Reconci	Mato	h Ledger Entry Re	cords without match	ning:				:	Clear All
		Bank Reconcill	iation Records where	e:	Start	ting comparison for 🧰 and 🗸 😵	Clear	G	Refresh
		Stater	nent Start Date	✓ equal to	~	· ·	0	-	Reports DO
								0	ок
Add Related	Record Remove	1						•	Cancer
Match Pr	rimary AND Related	d Record Finds	Match Primary OR R	elated Record Finds					
53.93	A65	Sep 15 2023	Employer Portio						
63.56	458	Jan 30 2023	Check						
91.80	467	Aug 18 2023	Employer Portio						
91.80	469	Sep 1 2023	Employer Portio						
91.80	471	Aug 4 2023	Employer Portio					ð	Configure
91.80	473	Jul 21 2023	Employer Portio					-	
							14 Results	\bigotimes	Collapse