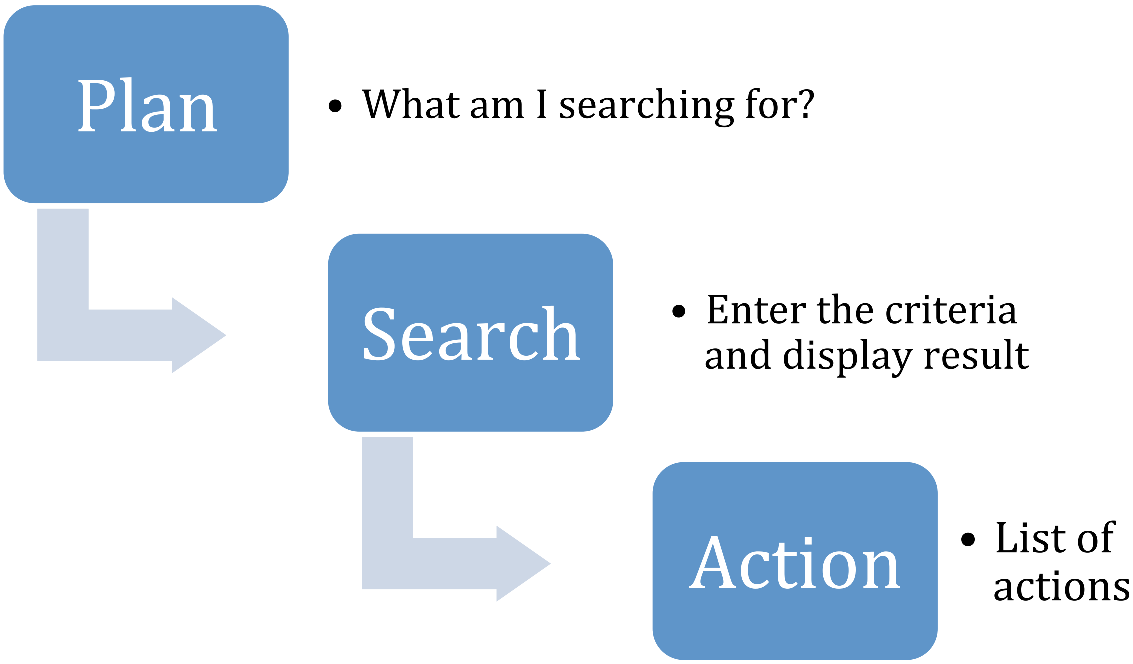
Tips on Advanced Search



PLAN

Advanced Search requires two major decisions:

1. What are the criteria that I want to use to filter the data?
2. What type of data do I want to display on the list?

It leads to the next step that follows advanced search, which is: what action, if any, do I want to do to the results of my search?

Ask yourself these questions:

Where is the data that I will use for the criteria?

- Is it in the contact record?
- Or is it in one or more related tables such as an activity or event participation?
- Does the target of the search have to meet *all* of my criteria? Or am I looking for *any* results that meet *some* of the criteria?
- Will I be looking inside an existing group of contacts? Or contacts, activities or contributions with a specific tag?
- Can I reuse a prior search that I or someone else saved?

What result do I want?

- Am I looking for individuals? For organizations?
- Am I looking for a list of Activities? Contributions? Event Participation? Memberships?

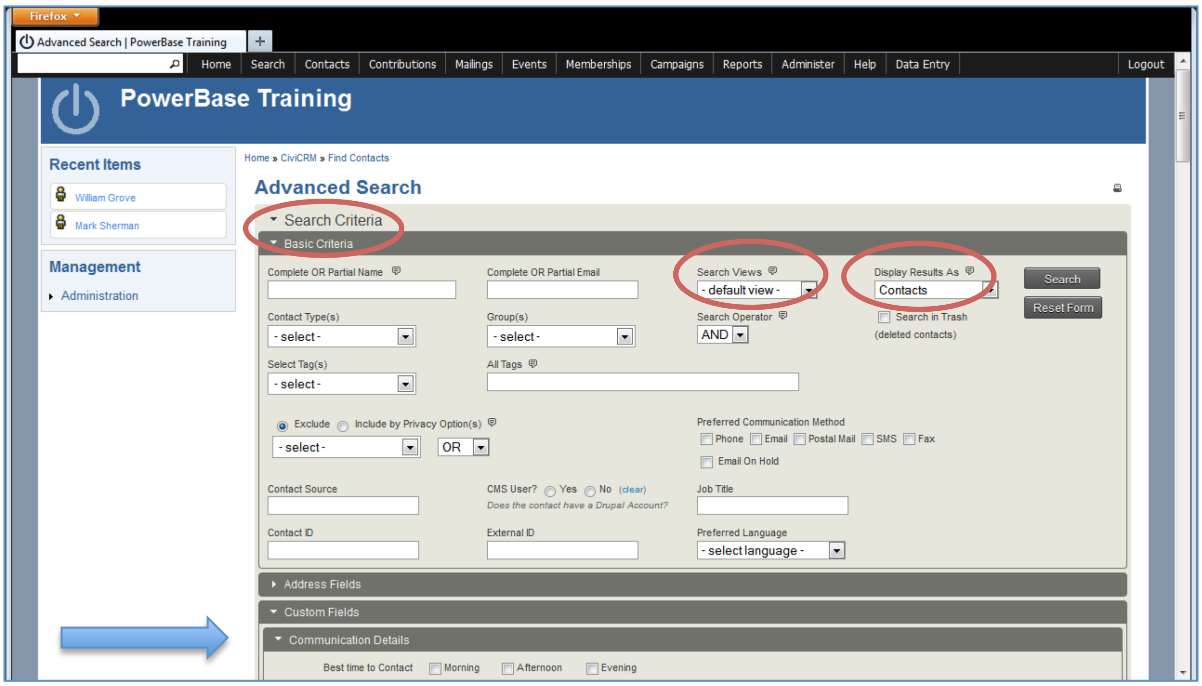
SEARCH

You will find the advanced search by going to **Search->Advanced Search**

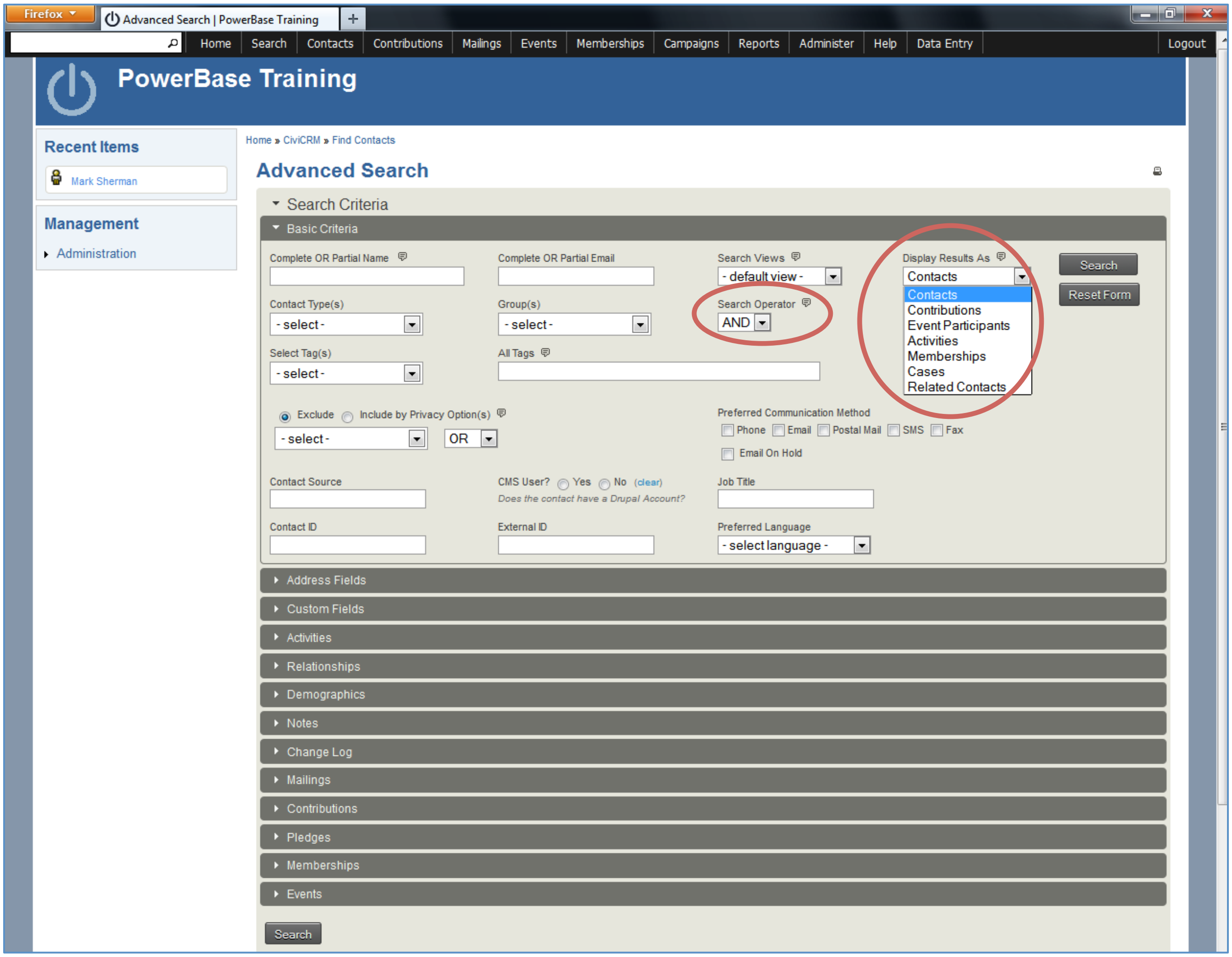
The Advanced Search Screen is full of fields to select from and it can be quite intimidating.

Here are some guidelines:

- Not all fields that can be searched are exposed when you first open it. You can expand the dark grey bar (we sometimes call them accordians) by clicking on the triangle to the left of the title.



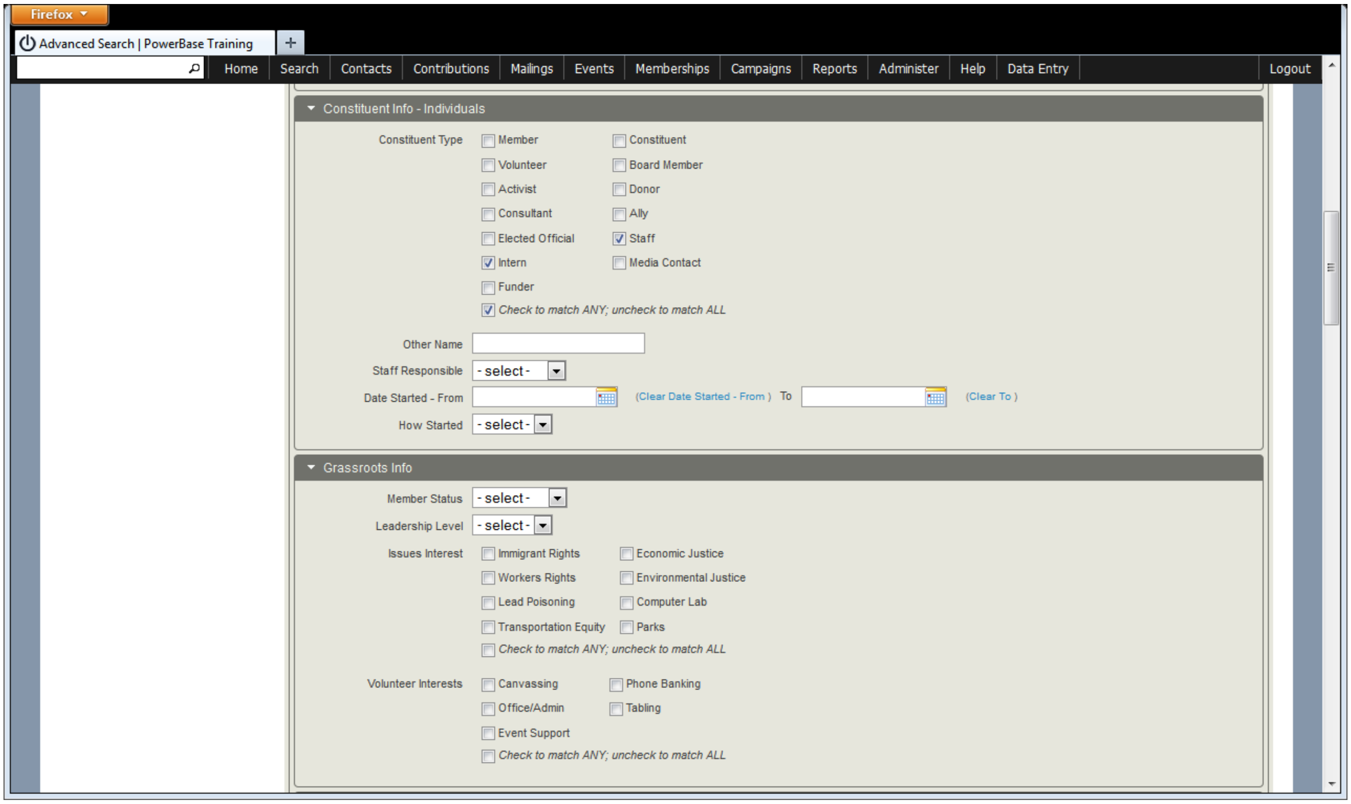
- The "Basic Criteria" section has some notworthy options that can determine the *appearance* of your results as well as some of the *content*. The "Search views" option lets you pick which contact data should appear on the search results (this only applies to Contacts search results.) You can change which record types you see from default view showing contact recordss to seeing event participation records, or activities or contributions just by selecting the "Display Results as" box as shown in the next screen shot.



OR/AND Options

Advanced Search is designed to narrow your result set as you select more and more critera. This is the idea that it "ANDs" criteria together so it must have all the criteria to pass the filter. So for example, if you select that the contact type must be an individual AND that there preferred language must be Spanish, you will get only Spanish speakers as a result. You can change that, if you like, by switching the "Search Operator" to "OR". This will cause the test to be whether the contact is an individual OR speaks Spanish. That's a nonsense search as you will get all the individuals and you don't need the Spanish language test but hopefully it gives you the idea of how it might work.

That being said, Advanced Search mostly "ANDs" critera together and the more you add criteria, the smaller the list. In some cases, though, it will "OR" criteria together even if you've selected "AND" as the "Search Operator." The next screen gives an example of where this would happen.



Take a look at "Constituent Type." Say that we're looking for a list of staff members and interns, so we check the boxes next to them. If we want to bring up a list of the staff members and the interns, we need to work with the box labeled "Check to match ANY, uncheck to match ALL". By checking it, we've asked for anyone labeled "Staff" OR labeled "Intern". If we don't check the box labeled "Check to match ANY, uncheck to match ALL", we'll get only those people are who are marked as "Intern" AND "Staff".

The Tables That are Searchable

PowerBase is an enhanced version of CiviCRM. It has been changed to track more information about individuals and organizations that is of specific interest to community organizing. Most of these fields are kept in the "accordion" group called "Custom Fields". Expand it and you'll see the "Constituent Info – Individuals", "Grassroots Info", "Demographics", "Voter Info", "Media Info" , and "Funder Info"; all of which apply to individuals. Look further and you'll see similar groups of fields for Organizations: "Constituent Info – Organizations", "Organizational Details", "Media Outlet Info" and so on. "Communications Details" applies to both organizations and individuals.

All of the custom fields just listed apply to the Contact table, which is designed to have one contact entry for every person or organization in your database. CiviCRM and PowerBase also include more standard fields for Contacts, such as "Address Fields" and "Demographics" , which round out the list of field groups that specifically describe a Contact on a one per one basis. In case you're wondering, it's easy to add or subtract fields and their related options to the "Custom Fields"; it's not so easy to do so with many of the standard fields that are part of the core CiviCRM software.

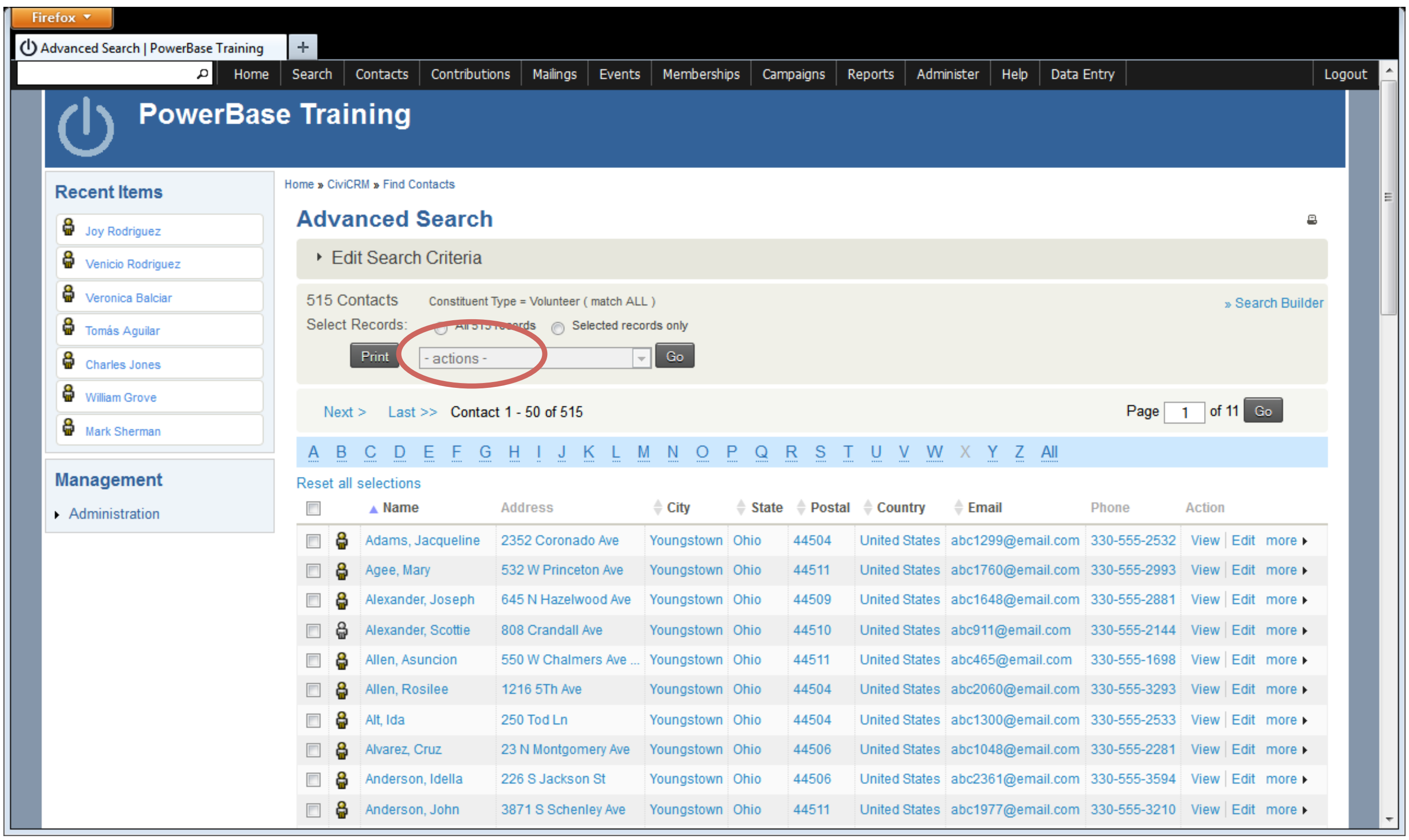
Searching with Related Tables

There are other tables used in PowerBase and all of them may have more than one entry per organization or individual (Contact). These are “Activities”, “Relationships”, “Notes”, “Contributions”, “Memberships”, “Events” (participation), “Change Log”, “Mailings”, and “Pledges”.

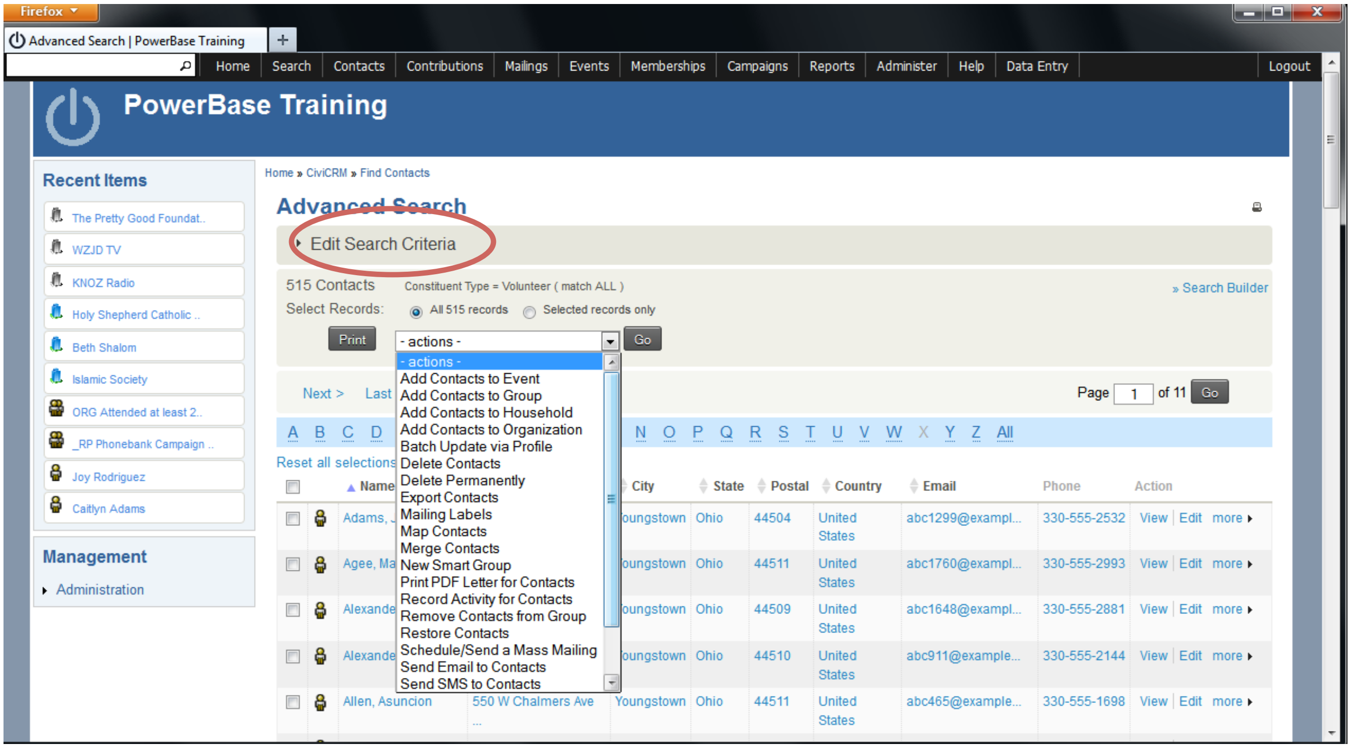
You can unlock the power of your PowerBase by combining search fields from multiple tables. For instance, you can use the fields in these tables to find people that made donations during a period of time, or attended a type of event, such as leadership meetings. You can combine those criteria to find which leaders have attended events AND made a contribution. Or you can find out which of your media contacts has clicked on the links in your email. This is data mining – looking through all your data to build a picture of who you are enaged with and then acting on that information.

Action

Once you have your criteria selected, the next step is to hit the “Search” button and see what you get. If there aren’t any matches, you’ll get a message to that effect at the bottom of the screen. If there are matches, you’ll get a list similar to this one:



Note the field with the word “-actions-“ in it. If you click on the triangle next to it, you’ll get a dropdown list of all the things you can do with the records on the list. Whenever you see a list like this, whether you get it from Advanced Search or some other search, check out the action list, there are lots of things that you can do from it. See the next screenshot for a partial list.

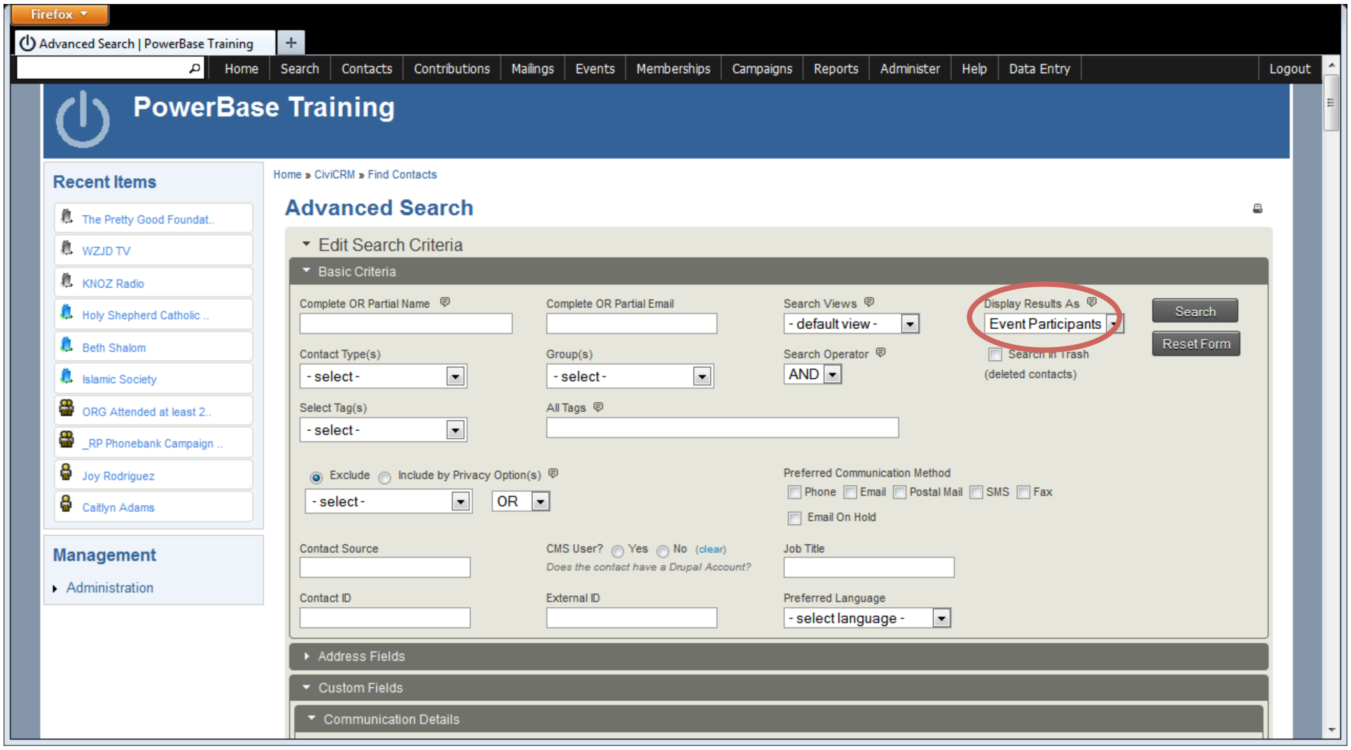


We're not able to go into all the actions in this document, but there is one that we'd like to highlight – "New Smart Group".

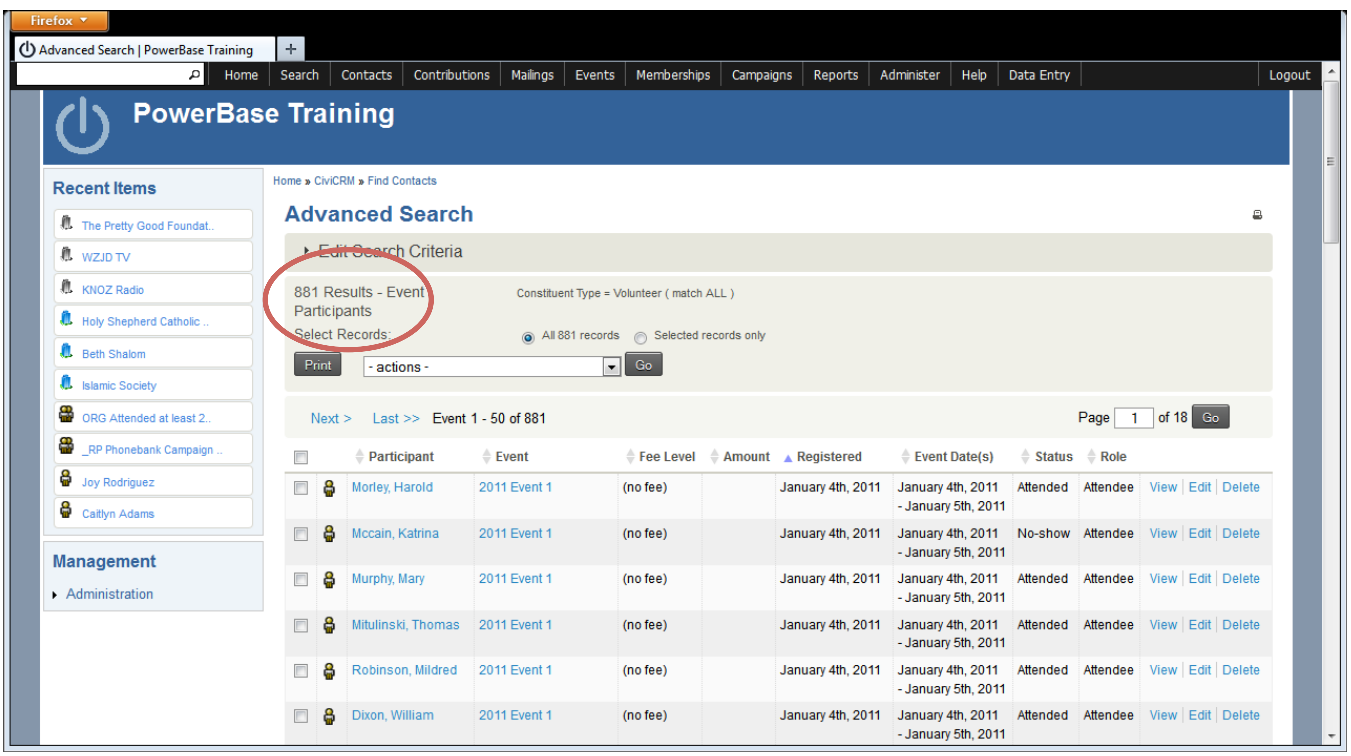
If you select "All nnnn records" and "New Smart Group", PowerBase will remember the criteria of your search and update the list of contacts with the latest selection the next time you open a group.
When you create the smart group or if you create a static group, make sure you mark the group as "Mailing List" if you intend to send an email to them.

Action with Other Tables

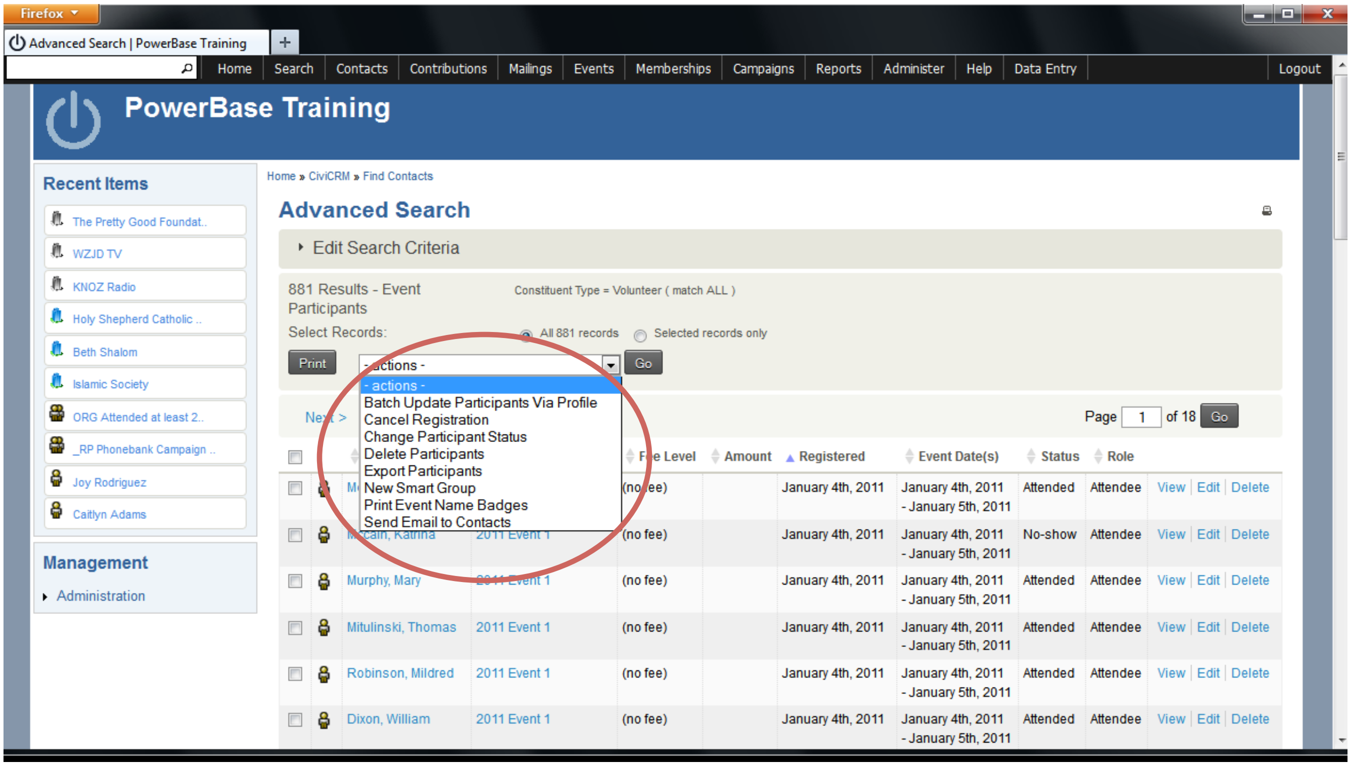
Let's say you did a search of your volunteers and you realize that you want to see what events they've gone to. You can change the search results by clicking on the "Edit Search Criteria", which will take us back to our original search criteria. Once we are there, we can change the "Display Results As" to "Event Participants"



Once we click “Search” again, we now have an entirely different list: all the events that these contacts have been registered for.



The actions available are different from those available on a contact list, as they are targeted towards participant records.



Participant records are just one type of output, we could also retrieve contribution records or activities or memberships.