



ADVANCED QUERY BUILDER AND TEMPORARY GROUPS

Try your hand at building some complicated reports with Query Builder. Learn how to build statements and combine statements to build compound statements. Discover the different options that are available from Query Builder output results.

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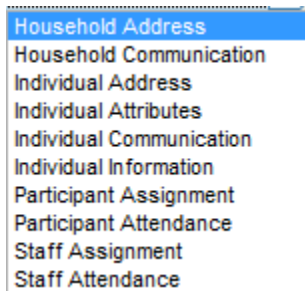
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ADVANCED QUERY BUILDER AND TEMPORARY GROUPS

QUERY BUILDER

Often you need to find people by means other than name. Query builder provides you with the tools to find people in many different ways. In fact, you can build your own query using any combination of the following categories.



For example, you may need to find adults who attended an adult bible community class over a specific date range, or you need to find all parents of the children who attend a specific children's ministry class.

Order of Operations

Before you begin building your query, it is important to understand a few concepts so that you get the best results possible from your search parameters. The first concept is order of operations, which you may remember from school math classes. The second concept is logical expression, which uses the notation of **[AND OR]** to produce a set of results.

These concepts are important because they are tools that can be used when building your queries. The choices you make affect the results that are returned from your advanced search.

In math classes, you learned that mathematical problems had an order of operations especially when you had a problem like the following:

$$80 + 2 * 2 + 4 - 3 - 10 * 5/2 = 60$$

In fact, a different result is rendered for each of the following problems though each contains the same set of numbers. This is because there is an order of operations that causes parts of the problem to be solved before other parts.

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$$(80 + 2) * (2 + 4 - 3) - 10 * 5 / 2 = 467$$

The order of operations dictates that expressions within parenthesis are evaluated first. After that, the order of precedence for mathematical operators is from left to right in the following order:

1. Parentheses
2. Multiplication and Division
3. Addition and Subtraction

Advanced search uses the concept of order of operations when finding people based on the supplied statements. As you can see in the example below, parenthesis appear around parts of the statement, which means that each portion of the search within parenthesis is performed first and then the others are performed from first to last.

Statement Builder

Combining multiple fields into a search statement extends the search capabilities by allowing such concepts as "Show me all people between the age 25-30 who also attended the Marriage Enrichment retreat". Searches are performed in the following order of precedence: AND, OR. Precedence is highlighted with parenthesis.

	Field Search
[Remove]	((ParticipantAttendance.Ministry EQUAL TO "Bible Communities" AND ParticipantAttendance.Activity EQUAL TO "Synergy")
[Remove] AND	(IndividualInformation.StatusGroup EQUAL TO "Attendee" AND IndividualInformation.Status EQUAL TO "Attendee")
[Remove] AND	(IndividualInformation.StatusGroup EQUAL TO "Member" AND IndividualInformation.Status EQUAL TO "Member"))

Add To Compound Statement Run Search

Notice that AND joins each of our separate statements. If we tried to run the search like this we would get zero results. A person can only have one status and the query is asking to look for people who have both attendee and member status.

Logical Expressions

In the last topic we learned that searches are performed in an order of precedence. Any part of the expression within parenthesis is performed prior to the other portions. The parts of the search or statements are joined together by a logical expression.

Just as in mathematical expressions, there is a specific order of precedence for evaluating logical expressions that have more than two operators. Expressions inside parenthesis are evaluated first and the logical operators are evaluated in the following order:

1. AND
2. OR

For example, the parenthesis in the following statements makes the two statements logically different:

- Statement 1 AND Statement 2 OR Statement 3
- Statement 1 AND (Statement 2 OR Statement 3).

The rules for using the AND operator, the OR operator are shown below:

- X AND Y are only true if X is true and Y is true
- AND requires all items to be true for the output to be true
- X AND Y is false if X is false or Y is false
- AND requires only one item to be false for the output to be false
- X OR Y is true if either X is true or Y is true.
- OR requires only one item to be true
- X OR Y is false if X is false and Y is false
- OR requires all items to be false for the output to be false

To fix our earlier query we need to change the logical expression to use AND with OR to get the correct results.

Compound Statement Builder

Combining multiple statements into a compound search statement extends the search capabilities even further to help you find very niche segments. Searches are performed in the following order of precedence: AND, OR. Precedence is highlighted with parenthesis.

		Statement Search	
[Remove]		((ParticipantAttendance.Ministry EQUAL TO "Bible Communities" AND ParticipantAttendance.Activity EQUAL TO "Synergy") AND (IndividualInformation.StatusGroup EQUAL TO "Attendee" AND IndividualInformation.Status EQUAL TO "Attendee")))
[Remove]	OR	((ParticipantAttendance.Ministry EQUAL TO "Bible Communities" AND ParticipantAttendance.Activity EQUAL TO "Synergy") AND (IndividualInformation.StatusGroup EQUAL TO "Member" AND IndividualInformation.Status EQUAL TO "Member")))

Run Search

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FIELD SEARCH

Query builder can perform simple searches within the Field Search area on the Query Builder form. Performing a field search allows you to find all people based on a single parameter. Some examples of field searches are as follows:

- All females (or males)
- All participants who attended an activity
- All individuals who have a specific individual attribute
- All individuals born prior to a specific date or after a specific date

To perform a field search

1. On the **People** tab, click **Query Builder** in the left hand menu options. The Query Builder form appears.
2. Select the **Search By** criteria from the drop-down field. The remaining fields populate with the corresponding information:
 - a. Participant Attendance
3. Select the **Field** from the drop-down list:
 - a. Activity
4. Select the **Comparison** operator from the drop-down list:
 - a. Equal To
5. Select the remaining values from the drop-down fields and/or type the text to search for in the **Value** field. The choices you see depend upon the selections you make in the available drop-down lists.
 - a. Ministry Name
 - b. Activity Name

- Click **Run Search**. All individuals matching your criteria appear in the Search Results grid.

Field Search

To begin, select from the "Search By" field in the Field Search section and follow the prompts as you build your search. If you would like to join two or more fields together to represent the search criteria, click the "Add to Statement" button. After you have created two or more statements you can begin building a compound statement for an even more refined search.

Search By:	Field:	Comparison:	Value:
Participant Assignment ▼	Activity ▼	Equal To ▼	Bible Communities ▼
			Synergy ▼
			▼

Comparison Operators

Comparison operators are provided to give added functionality to your queries. The operator expresses the relationship between the Field and its Value. For example, show all individuals who have city values that are equal to "Dallas". "Equal to" is the operator.

The following table describes the operators used in Advanced Search.

Operator	Description
Contains	Matches string values. The value entered must be contained somewhere within the text field to match.
Does Not Contain	Matches string values. The value entered must not be contained anywhere within the text field to match.
Starts With	Matches string values. The value entered is found at the beginning of the text field to match.
Ends With	Matches string values. The value entered is found at the end of the text field to match.
Is Before	Matches date values. The results returned contain date values before the value to match .
Is After	Matches date values. The results returned contain date values after the value to match.
Is Between	Matches date values. The results returned contain date values between the two dates to match.
Is Not Between	Matches date values. The results returned contain date values outside of the two dates to match.
Equal To	Matches the value exactly. When this operator is visible, a drop-down list generally appears in the Value area. Select the Value to match from each available drop-down.
Not Equal To	Does not match the Value. When this operator is visible, a drop-down list generally appears in the Value area. Select the value to omit from each available drop-down. Results returned do not contain the field to match.
Is Null	The field to match is empty.

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BUILDING STATEMENTS

When building statements, keep in mind the order of precedence and logical expressions you will use. These concepts affect the results you will get when building your statements.

To build a statement:

1. On the **People** tab, click **Query Builder** in the left hand menu options. The Query Builder form appears.
2. Select the **Search By** criteria from the drop-down list. The **Field** drop-down list refreshes to display appropriate fields.
3. Select the **Field** from the drop-down list.
4. Select the correct **Comparison** from the drop-down list.
5. Select or type your **Values**. The fields that appear in this space depend upon the choices you have made in previous drop-down lists.
6. Click **Add To Statement**. The search criteria appear in the Statement Builder.
7. Repeat steps 1-6 for each search parameter you wish to use.
8. Select the correct logical expression (**AND** or **OR**) from the drop-down that appears between search criteria. (See Logical expressions for more information.)
9. Click **Run Search** to see the results.

Statement Example

Find all the people who attended a class whose status date is after 1/1/2009. Since we require all of this statement to be true we want to use AND to join them. In English our statement is:

- Participant Attendance to class AND
- Status Date is after 1/1/2009

In Query Builder, this statement appears as shown below:

Statement Builder

Combining multiple fields into a search statement extends the search capabilities by allowing such concepts as "Show me all people between the age 25-30 who also attended the Marriage Enrichment retreat". Searches are performed in the following order of precedence: AND, OR. Precedence is highlighted with parenthesis.

	Field Search	
[Remove]	((ParticipantAssignment.Ministry EQUAL TO "Bible Communities" AND ParticipantAssignment.Activity EQUAL TO "Synergy")
[Remove]	AND	IndividualInformation.StatusDate IS AFTER "1/1/2009"

Add To Compound Statement Run Search

BUILDING COMPOUND STATEMENTS

Compound statements are created when you need to join two or more statements together. For example, in the advanced search primer, we looked for all adults who attended an adult bible community who have a status of attendee or member requires a compound statement.

First, we must find all adults who attended the class who are status of member and then we must find all the adults who attended the class who are status of attendee.

To build a compound statement:

1. On the **People** tab, click **Query Builder** in the left hand menu options. The Query Builder form appears.
2. Select the **Search By** criteria from the drop-down list. The **Field** drop-down list refreshes to display appropriate fields.
3. Select the **Field** from the drop-down list.
4. Select the correct **Comparison** from the drop-down list.
5. Select or type your **Values**. The fields that appear in this space depend upon the choices you have made in previous drop-down lists.
6. Click **Add To Statement**. The search criteria appear in the Statement Builder.
7. Repeat steps 1-6 for each search criteria you wish to use.
8. Select the correct logical expression (**AND** or **OR**) from the drop-down that appears before each search criteria in the Statement Builder. (See Logical expressions for more information.)
9. Click **Add to Compound Statement**. The search criteria appear in the Compound Statement Builder.
10. Repeat steps 1-9 for each part of the compound statement.
11. Select the correct logical expression (**AND** or **OR**) from the drop-down that appears before each statement in the Compound Statement Builder.

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Compound Statement Examples

In the following example we are looking for all adults who attended our adult bible community class who live in either Coppell or Flower Mound.

First, look at the problem step-by-step. What statements do you need to find this result set?

- Adults who attended the class
- Adults living in Coppell
- Adults living in Flower Mound

This requires a compound statement because we need to find the adults who attended the class and live in Coppell along with the adults who attended the class and live in Flower Mound. Since you only have one city per address we cannot just combine all the fields into one statement. These two statements are joined with an OR as shown below.

Compound Statement Builder

Combining multiple statements into a compound search statement extends the search capabilities even further to help you find very niche segments. Searches are performed in the following order of precedence: AND, OR. Precedence is highlighted with parenthesis.

		Statement Search	
[Remove]		((ParticipantAttendance.Ministry EQUAL TO "Bible Communities" AND ParticipantAttendance.Activity EQUAL TO "Synergy") AND HouseholdAddress.City CONTAINS "Coppell"))
[Remove]	OR	((ParticipantAttendance.Ministry EQUAL TO "Bible Communities" AND ParticipantAttendance.Activity EQUAL TO "Synergy") AND HouseholdAddress.City CONTAINS "Flower Mound"))

Run Search

Note: You may be tempted to use AND between the different city queries. This is incorrect though it seems logical. When you choose AND you're telling Fellowship One to find all people with a city address of Coppell and Flower Mound. Since individuals cannot have two city names in the same address field this query will return no results. Remember to choose OR between statements like this.

FIELD DESCRIPTIONS

To get the best results when querying address data its important to know which type of address you are looking at. The TYPE field allows you to isolate Primary, Secondary, Business address data from all the other address types. In the description below the TYPE statement implies using the AND operator to locate your address data by TYPE of address. The TYPE field is defined below in bold text.

Household Address

Search for a household by address using the following parameters:

- Address—use with a Type statement with an AND logical expression to only see people whose "Primary" address is 123 Main St., for example. If you query on address alone, you will return all households with the search in any address type (Primary, Secondary, College, etc.)
- City—use with a Type statement with an AND logical expression to only see people whose "Primary" city is Dallas, for example.
- Comment—the open Comment field available when adding a new address. This is a free text field, so unless you are always very consistent when entering information, you may need to query a few times to get all the results you desire. For example, in one record the comment may be "Don't send mail" and in another the comment may be "No mail."
- Country—use with a Type statement with an AND logical expression to only see people whose "Primary" country is USA, for example.
- State—use with a Type statement with an AND logical expression to only see people whose "Primary" state is Texas, for example.
- **Type—the type of address you are interested in querying. Available types are Primary, Secondary, College, Vacation, Business, Org, Previous, Statement, and Mail Returned/Incorrect. You should always use a type statement with "Primary" along with a statement like "City" or "Zip Code" when doing mailings to get people whose primary household address matches your query.**
- Zip Code—use with a Type statement with an AND logical expression to only see people whose "Primary" zip code is 75038, for example.

Household Communication

Search for a household based on any of the following parameters:

- **Listed**—true or false are the only values associated with this field. Use with the Type statement with an AND logical expression to query for households with a specific value for the Type selected. For example, for type "Email" find all records that where Listed = "True."
- **Type**—use with Listed or Value with an AND logical expression to pull specific communication types for a household. Available types are Home Phone, Work Phone, Cell Phone, Email, Alternate Email, Vacation Phone, Pager, Children Phone, Fax, Web Address, Previous Phone, and IM Address.
- **Value**—the actual number or text string associated with the communication type. Use with a Type statement with an AND logical expression to query for households with a specific value for the type selected. For example, for type "Home Phone," show all households where the Home Phone Value contains "817."

Individual Address

Search for an individual by address using the following parameters:

- **Address**—use with a Type statement with an AND logical expression to only see people whose "Primary" address is 123 Main St., for example. If you query on address alone, you will return all households with the search in any address type (Primary, Secondary, College, etc.)
- **City**—use with a Type statement with an AND logical expression to only see people whose "Primary" city is Dallas, for example.
- **Comment**—the open Comment field available when adding a new address. This is a free text field, so unless you are always very consistent when entering information, you may need to query a few times to get all the results you desire. For example, in one record the comment may be "Don't send mail" and in another the comment may be "No mail."
- **Country**—use with a Type statement with an AND logical expression to only see people whose "Primary" country is USA, for example.
- **State**—use with a Type statement with an AND logical expression to only see people whose "Primary" state is Texas, for example.

- **Type**—the type of address you are interested in querying for. Available types are Primary, Secondary, College, Vacation, Business, Org, Previous, Statement, and Mail Returned/Incorrect. You should always use a type statement with "Primary" along with a statement like "City" or "Zip Code" when doing mailings to get people whose primary household address matches your query.
- Zip Code—use with a Type statement with an AND logical expression to only see people whose "Primary" zip code is 75038, for example.

Individual Attributes

Search for individuals based on the individual attribute assigned to his or her record.

Use any of the following parameters:

- Attribute—an individual attribute that exists within an attribute group. For example, you may have an attribute group called "Experiences" and the attributes within that group are "Baptism," "Dedication," "Marriage," etc.
- Attribute Group—a grouping of attributes.
- End Date—this is an optional field that may or may not have been configured when your Fellowship One Administrator configured Individual Attributes on the Admin tab.
- Staff/Pastor—any portal user with ministry access. This is an optional field that may or may not have been configured when your Fellowship One Administrator configured Individual Attributes on the Admin tab.
- Start Date—this is an optional field that may or may not have been configured when your Fellowship One Administrator configured Individual Attributes on the Admin tab.

Individual Communication

Search for individuals based on communication values. Use any of the following search parameters:

- Listed—true or false are the only values associated with this field. Use with the Type statement with an AND logical expression to query for individuals with a specific value for the Type selected. For example, for type "Email" find all records that where Listed = "True."
- **Type**—use with Listed or Value with an AND logical expression to pull specific communication types for an individual. Available types are Home Phone, Work Phone, Cell Phone, Email, Alternate Email, Vacation Phone, Pager, Children Phone, Fax, Web Address, Previous Phone and IM Address.

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- Value—the actual number or text string associated with the communication type. Use with a Type statement with an AND logical expression to query for individuals with a specific value for the type selected. For example, for type "Home Phone," show all individuals where the Email Value contains "@microsoft.com."

Individual Information

Search for individuals based on basic information. Use any of the following:

- Bar Code—a bar code number associated with the individual for use in Fellowship One Check-in. Bar codes are entered through the Check-in kiosk with a bar code scanner.
- Date of Birth—enter the date of birth or use the calendar icon to pick the date from a calendar. See Working with calendars for more information.
- Employer—this is a free text field available on the Basic tab for an individual's record. It is best to use with the "Contains" operator and just a few letters within the employer you are searching for. This will help capture people where the Employer is misspelled.
- First Name—the First Name field.
- Former Church—a free text field available on the Basic tab for an individual's record. It is best to use with the "Contains" operator and just a few letters of the church you are searching for.
- Former Name—the former or maiden name of the individual.
- Gender—Male or Female.
- Goes By—the shortened or "nickname" of the individual. This name prints on name tags through Fellowship One Check-in.
- Household Member Type—available types are Head, Spouse, Child, Visitor and Other. Types can be changed on the Members tab from the household view.
- Last Name—the Last Name field.
- Marital Status—available marital statuses are Married, Divorced, Separated, Single, Widow, Widower and Child/Yth.
- Middle Name—the Middle Name field.
- Occupation—the occupation of the individual. This is a drop-down list field on the Basic tab for an individual that contains several of the most popular job.

- Occupation Description—a free text field where you can type an actual occupation if not available in the Occupation drop-down list or a description of an occupation.
- Prefix—available prefixes are Dr., Jdg., Miss, Mr., Mrs., Ms. and Rev.
- School—schools are configured by your Fellowship One Administrator in the Admin area of Fellowship One. A selection list is available on the Basic tab for an individual where you can see all the available schools.
- Status Group—a grouping of statuses. The five global status groups that come with Fellowship One include: Member, Attendee, Inactive, Deceased and System. The System group includes statuses New from Web site and New Checkin, which are automatically assigned to individuals who are added to Fellowship One through Fellowship One Checkin (New Checkin) or through your church Web site using Fellowship One WebLink (New from Web site).
- Status—statuses are configured by your Fellowship One Administrator in the Admin area of Fellowship One and can be any name you desire.
- Status Comment—when statuses are configured in the Admin area of Fellowship One, you can choose whether or not you want to include a comment field for each status. This is a free text field that can contain any string of text or numbers.
- Status Date—enter the status date or use the calendar icon to pick the date.
- Suffix—a free text field on the Basic tab for an individual. It is reserved for suffixes like Jr., Sr., III, and so on. Since it's a free text field, run your query with the "Contains" operator and type only the first letter, "J" for example, in the Value field.
- Web User ID—this field is populated on the Basic tab for an individual when a person creates an account through the church Web site via Fellowship One WebLink.

Participant Assignment

Search for people based on whether or not each has a participant assignment. Use the following parameters:

- Activity—the activity to which the participant is assigned. In the Value fields, first select the Ministry and then the activity within that ministry.
- Activity Group—the activity group to which the participant is assigned. In the Value fields, first select the Ministry and then the activity within the ministry, and finally the activity group.

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- Activity Schedule—the activity schedule to which the participant is assigned. In the Value fields, first select the Ministry and then the activity within the ministry, and finally the activity schedule.
- Breakout Group—the breakout group to which the participant is assigned. In the Value fields, first select the Ministry and then the activity within the ministry, and finally the breakout group.
- Date/Time—the date range of the participant assignment.
- Ministry—the ministry to which the participant has an assignment (regardless of activity).
- Room, Location, Class—the room/location to which the participant has an assignment. In the Value fields, first select the Ministry and then the activity within the ministry, and finally the Room, Location, Class.

Participant Attendance

Search for people based on participant attendance at a particular event/activity.

Attendance is captured through Fellowship One Check-in in real-time or after the event using Post Attendance. Use any of the following parameters:

- Activity—the activity that the participant attended. In the Value fields, first select the Ministry and then the activity within that ministry.
- Breakout Group—the breakout group the participant attended. In the Value fields, first select the Ministry and then the activity within the ministry, and finally the breakout group.
- Date/Time—a date range to search for attendance.
- Ministry—the ministry the participant attendance was recorded against (regardless of activity). For example, show all participants who attended any activity within the Adult ministry.
- Room, Location, Class—the room/location the participant attended. In the Value fields, first select the Ministry and then the activity within the ministry, and finally the Room, Location, Class.

Staff Assignment

Search for people based on whether or not the person has a staff assignment. Use the following parameters:

- Activity—the activity to which the volunteer/staff member is assigned. In the Value fields, first select the Ministry and then the activity within that ministry.
- Activity Group—the activity group to which the volunteer/staff member is assigned. In the Value fields, first select the Ministry and then the activity within the ministry, and finally the activity group.
- Activity Schedule—the activity schedule to which the volunteer/staff member is assigned. In the Value fields, first select the Ministry and then the activity within the ministry, and finally the activity schedule.
- Breakout Group—the breakout group to which the volunteer/staff member is assigned. In the Value fields, first select the Ministry and then the activity within the ministry, and finally the breakout group.
- Date/Time—the date range of the volunteer/staff member assignment.
- Ministry—the ministry to which the volunteer/staff member has an assignment (regardless of activity).
- Room, Location, Class—the room/location to which the volunteer/staff member has an assignment. In the Value fields, first select the Ministry and then the activity within the ministry, and finally the Room, Location, Class.

Staff Attendance

Search for people based on staff attendance at a particular event/activity.

Use any of the following parameters:

- Activity—the activity the volunteer/staff member worked. In the Value fields, first select the Ministry and then the activity within that ministry.
- Breakout Group—the breakout group the volunteer/staff member worked. In the Value fields, first select the Ministry and then the activity within the ministry, and finally the breakout group.
- Date/Time—a date range where you want to search for volunteer/staff member attendance.
- Ministry—the ministry where the volunteer/staff member has attendance (regardless of activity).

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- Room, Location, Class—the room/location where the volunteer/staff member worked. In the Value fields, first select the Ministry and then the activity within the ministry, and finally the Room, Location, Class.

TEMPORARY GROUPS

As we saw with Query Builder the output is a list of names that we can then save into a group for later use. Temporary Groups are the same, but generated by reports from the Fellowship One Report Library. The big difference is the ability to save my report along with the specified output type of Temporary Group and run my report whenever I need it.

Query builder can be used to find all the men who attend an adult bible community class as shown below:

Statement Builder

Combining multiple fields into a search statement extends the search capabilities by allowing such concepts as "Show me all people between the age 25-30 who also attended the Marriage Enrichment retreat". Searches are performed in the following order of precedence: AND, OR. Precedence is highlighted with parenthesis.

	Field Search	
[Remove]	((ParticipantAttendance.Ministry EQUAL TO "Bible Communities" AND ParticipantAttendance.Activity EQUAL TO "Synergy"))
[Remove]	AND	IndividualInformation.Gender IS EQUAL TO "Male"

Add To Compound Statement Run Search

However I need to re-create this query every time I want to send an email or update my Group Type People List.

I could use a report and temporary groups to do the same thing.

Using the report M1511E-**Times Attended Activity by Age Gender and Status**, I can filter my attendance output by gender and then send that output to a temporary group. This output is found in the Groups menu under Temporary Groups.

▼ **Temporary** (Will expire after 3 days) 1

	Members	Expires
Synergy Men's Roster	47	4/7/2009 at 9:46 AM
Created from Report Library via Synergy Men's Roster (M1511E).		

By naming the report I also affect the name of the temporary group. This temporary group has the same properties as a group created by query builder. You have the same Actions menu control which means you can take the output of your temporary group and save into another group or create a new group if you want to keep the results longer than three days.

The screenshot shows a panel titled "Actions" with a gear icon. Below the title is a button labeled "Add to a group...". Underneath are three form fields: "Choose a group:" with a dropdown menu showing "Add to a new group..."; "Choose a group type:" with a dropdown menu showing "People List"; and "Give the new group a name:" with an empty text input field. At the bottom of the panel is an "Add" button.

I can select as many people as I want from my temporary group and save them into another group.

Another reason to use Temporary Groups is to email a list of people who use the same report you use for staffing/volunteer rosters. The M3500-Activity Staffing Assignment Roster report can produce a temporary group of your volunteers who work the 9 am service.

The screenshot shows a form with a dropdown menu labeled "Choose an Output Type: *" set to "Temporary Group". Below it, text reads "Output from this report will be named: Activity Staffing Assignment Roster (Change)". Below this are two buttons: "Run Report" and "Cancel" (in red), followed by "Or" and a button with a plus icon labeled "Save to My Reports".

▼ **Temporary** (Will expire after 3 days) 2

	Members	Expires
Activity Staffing Assignment Roster	222	4/7/2009 at 9:57 AM
Created from Report Library via Activity Staffing Assignment Roster (M3500).		

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Another example of temporary groups is finding out who is missing from your class or activity. Using the M1035E-Absent after X times attended report you can create a temporary group of those people who have not attended your class in the last 14 days.

▼ **Temporary** (Will expire after 3 days) 3

	Members	Expires
Absent After X Times Attended	22	4/7/2009 at 10:03 AM
Created from Report Library via Absent After X Times Attended (M1035E).		

From this temporary group I can email those who are absent to find out what is going on.

Another example of using temporary groups from reports is when the query builder screen times out trying to pull back the data.

Your query has timed out. Try running it again. If it continues to time out, try to simplify the query.

Field Search

To begin, select from the "Search By" field in the Field Search section and follow the prompts as you build your search. If you would like to join two or more fields together to represent the search criteria, click the "Add to Statement" button. After you have created two or more statements you can begin building a compound statement for an even more refined search.

Search By:	Field:	Comparison:	Value:
Individual Information	Status	Equal To	Attendee

If you need an email distribution list based upon status you can use the P6027E-All Church Mailing Report (for labels and temp groups).

All Church Mailing Report (for labels and temp groups)	20148	4/7/2009 at 11:28 AM
Created from Report Library via All Church Mailing Report (for labels and temp groups) (P6027E).		

There are also reports like the A1030-Individual in Groups which can take a temporary group as input and create another temporary group as output.

This report can take a large list like all attendees and then filter on attributes to create new temporary group as output. Query builder does let you start with a group list to query from.

MASS ACTION

With Mass Action you can take a group of people, either from query builder or temporary groups, and change their individual status or create a new participant assignment.

Perform a Mass Action

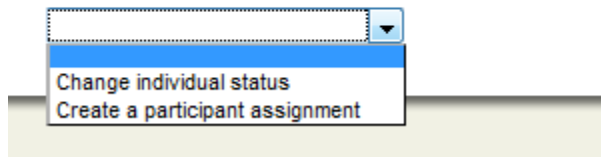
1. Select individuals from your group.
2. Click the **Actions** gear and select **Perform a mass action**.



3. Choose the action you want to perform.

You have selected 975 individuals

1. What action do you want to take?



4. Select the change you want to make.


2. Name this action so it is easy to find later:

Change individual status

3. Make and commit your changes:

Status

Status date

04/06/2009 
MM / DD / YYYY

Status comment

Review the proposed mass action

May 14, 2009

5. Confirm your decision to make the change.

Confirm changes for Change individual status

You are about to make the following changes:

Change individual status

Status > Sub Status: No change requested

Status Date: Change to 4/6/2009


Status Comment: No change requested

These changes will be made to 975 people. You will not be able to undo them.

Are you sure you want to make these changes?

[No, return to Prepare Mass Action](#)

6. Completion of mass action with option to continue.

 **Your mass action is being processed...**

You can:

- [Go to the mass action queue to see if your mass action is finished.](#)
- [Prepare another mass action for the same 975 people.](#)
- [Return to where you started \(View Group\).](#)

Mass Action with Participant Assignments

1. Find people with status attendee and status date after April 1, 2009.

Statement Builder

Combining multiple fields into a search statement extends the search capabilities by allowing such concepts as "Show me all people between the age 25-30 who also attended the Marriage Enrichment retreat". Searches are performed in the following order of precedence: AND, OR. Precedence is highlighted with parenthesis.

	Field Search
[Remove]	(IndividualInformation.StatusDate IS AFTER "4/1/2009"
[Remove]	AND (IndividualInformation.StatusGroup EQUAL TO "Attendee" AND IndividualInformation.Status EQUAL TO "Attendee")

2. Perform mass action to create participant assignment.

You have selected 600 individuals

1. What action do you want to take?

Create a participant assignment ▼

2. Name this action so it is easy to find it later:

Create a participant assignment

3. Specify the changes to be made:

Activity *

Our Church (Membership) ▼

Schedule/Instance

RLC

Our Church > Our Church (Big Room) ▼

Breakout Group

[Review the proposed mass action](#)

3. Review your changes to be sure.

Confirm changes for Create a participant assignment

You are about to make the following changes:

Create a participant assignment

Ministry > Activity: Adult Ministry > Our Church (Membership)

Activity Group > RLC: Our Church > Our Church (Big Room)

These changes will be made to 600 people. You will not be able to undo them.

Are you sure you want to make these changes?

[Yes, make these changes now](#)

[No, return to Prepare Mass Action](#)