

## SK Help - Groups Keeper

### Adding a Group

1. Click [Add] at the bottom of the Groups tab. This will bring up the "Create/Modify Group Filter" window.
2. Select which type of list you would like to retrieve (Families or Individuals). This decision is based on what information you would like to use once the group is completed. Do you want family information or do you want Individual information?
3. Select a category. This refers to the columns that will be selectable in step 1. This option is only to help streamline the list instead of showing all family, individual, attendance, attribute, contribution and visitation fields. This is optional and can be left on "Show all columns".
4. Build your query conditions using steps 1 through 4, one at a time. \*\* See Building Selection Criteria for more details.
5. Enter a group name if you want to save the group. If you do not enter a group name, the program will create the group as a "temporary query" and will be deleted upon closing the groups keeper window.
6. Enter a description of the group. This step is optional.
7. Click [Start Lookup] to view the results of your queries.

### Building Selection Criteria

When building the selection criteria while creating a group, the following breakdown of field types will help with your understanding of the way the database looks at field types.

**Text Fields** will give you the operator types of Is Blank, Is Not Blank, Contains, Equal To, Not Equal To, or Starts With.

**Drop Down** Lists will give you the operator types of Is Blank, Is Not Blank, Equal To, or Not Equal To.

**Combo Box** will give you the operator types of Is Blank, Is Not Blank, Equal To, or Not Equal To and special combo boxes allows you to select values like the level of a skill or talent and dates for the Willing To Serve and Leadership sections.

### The Groups Keeper window:

The Groups tab displays the Group Name, Created By, Date Created, Query Condition as well as Query Description.

### Updating a Group

Servant Keeper allows you to update a report instead of having to create a new group when you want to modify a few criteria. This is helpful and time saving when you have a group with 12 query conditions and only one needs to be updated weekly.

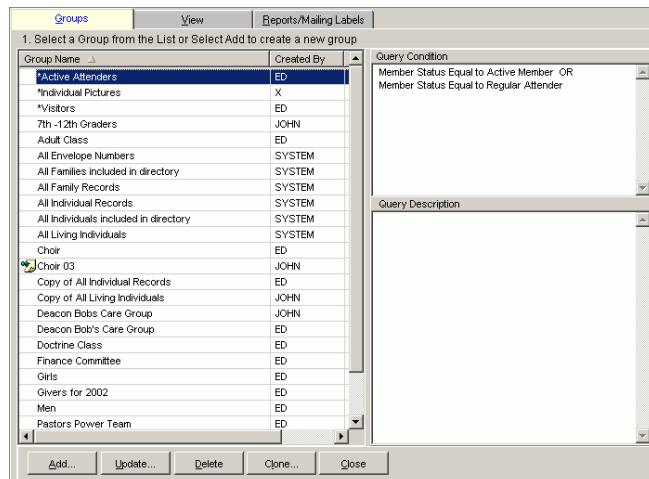
1. Click the Group Name in the list of Groups
2. Click [UPDATE]. The "Create/Modify Group Filter" window will appear.
3. Click the criteria you wish to change. It will appear in steps 1 through 4 above.
4. Make your changes as needed and click [Apply] to activate the change for that criteria.
5. Click [Add] to create an additional query condition.
6. Click [Delete] to remove the highlighted query condition.
7. Click [Clear All] to remove all query conditions and start again.
8. Click [Start Lookup] to save and view the list with the criteria changes or click [Save] to save the group and exit the "Create/Modify Group Filter" screen without viewing the results of the group.

### Viewing a Group:

Servant Keeper allows you to view the list of people or families based on the query conditions in the view window.

### To View A Group:

Double-Click the group or highlight the group and click the View tab folder. Servant Keeper will then return a list of all individuals or families who meet the criteria based on your conditions. The results will be listed in the VIEW window.



## Using Multiple Criteria:

Servant Keeper allows you to add up to 15 search criteria for each group.

You can have each record meet all the criteria by using the **AND** condition. (the default). This will narrow your group result because each record will need to meet all criteria in the group to be included in the list.

**Example:** There are 25 children in the 5<sup>th</sup> grade and 70 records with gender of male. A group using the following criteria will display only the boys in the 5<sup>th</sup> grade.

|              |          |            |  |     |
|--------------|----------|------------|--|-----|
| Gender       | Equal to | Male       |  | AND |
| Grade School | Equal to | 5th Grader |  |     |

**Note:** An example of using the **AND** condition incorrectly is when you are searching for a criteria that can only have one value per record.

**Example:** Let's say we have 50 Active Members and 35 Regular Attender in our database and we wanted to create a list with both member types listed. Using the following criteria would find 0 records because a record can not have a member status of Active Member **AND** Regular Attender.

|               |          |                  |  |     |
|---------------|----------|------------------|--|-----|
| Member Status | Equal to | Active Member    |  | AND |
| Member Status | Equal to | Regular Attender |  |     |

Using the **OR** operator will broaden your group results because each record would only need to meet one of the criteria to be included in the list.

**Example:** There are 25 kids in the 5<sup>th</sup> Grade Class and 70 records with gender of male. A group using the following criteria will display all of the males in the database along with all students in the 5<sup>th</sup> grade.

|              |          |            |  |    |
|--------------|----------|------------|--|----|
| Gender       | Equal to | Male       |  | OR |
| Grade School | Equal to | 5th Grader |  |    |

For the criteria to find both Active Members and Regular Attender to work properly you would need to use the **OR** operator to find one type of member or another.

**Example:** Let's say we still want to find those 50 Active Members and 35 Regular Attender in our database and we want to create a list with both types of members listed. Using the following criteria would find all 85 records because a record can have a member status of Active Member **OR** Regular Attendee.

|               |          |                  |  |    |
|---------------|----------|------------------|--|----|
| Member Status | Equal to | Active Member    |  | OR |
| Member Status | Equal to | Regular Attender |  |    |

You can mix **AND** and **OR** operators when you use parenthesis to guide the logic of the search. Mixing these operators will need to be treated just as algebraic expressions are created. Anything in a parenthesis will be performed first, before looking at the criteria outside the parenthesis.

To insert left parenthesis, double click on the box to the left of the query and hit Shift+9 on the keyboard. To insert a right parenthesis, double click on the box to the right of the query (before the AND or OR condition) and hit Shift+0 on the keyboard.

|   |                   |          |              |   |     |
|---|-------------------|----------|--------------|---|-----|
| ( | Gender            | Equal to | Female       |   | AND |
|   | Marital Status    | Equal to | Single       | ) | OR  |
|   | Church Activities | Equal to | Young Adults |   |     |

**Now that you have a good idea how to use groups let's look at a more advanced group.**

**Example:** Let's say we wanted to build a list of the youth with certain member statuses. First we need to add the criteria for the member statuses. This would be the same as the previous group.

|               |          |                  |  |    |
|---------------|----------|------------------|--|----|
| Member Status | Equal to | Active Member    |  | OR |
| Member Status | Equal to | Regular Attender |  |    |

Second we need to add the criteria for finding just the youth and we want to do that by age. After adding the age criteria our group would look like this:

|               |                    |                  |  |     |
|---------------|--------------------|------------------|--|-----|
| Member Status | Equal to           | Active Member    |  | OR  |
| Member Status | Equal to           | Regular Attender |  | AND |
| Age           | Less than or eq... | 18               |  |     |

The last thing we need to do is use parenthesis to separate the member statuses from the age criteria. After adding the parenthesis our group would look like this:

|   |               |                    |                  |   |     |
|---|---------------|--------------------|------------------|---|-----|
| ( | Member Status | Equal to           | Active Member    |   | OR  |
|   | Member Status | Equal to           | Regular Attender | ) | AND |
|   | Age           | Less than or eq... | 18               |   |     |

This group would find all the Active Members or Regular Attender that are 18 years old or younger.