

## Menu options

New Query, Save Query, Save Query As, My Queries, Recent Queries, Query Tags

## Query Tags

Use Query Tags to assign keywords to saved queries, making categorizing them easier

- Create a “Families” tag
- Create a “Members” tag
- Create a “Contributions” tag
- Create a tag with your name

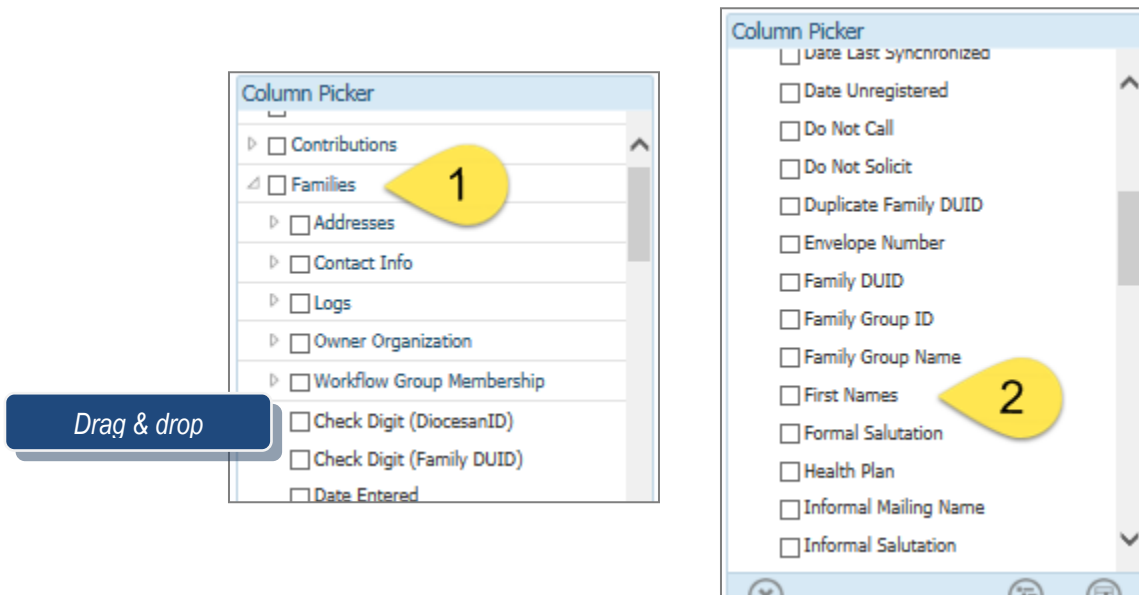
## Adding columns and conditions

There are 3 ways to populate the columns/conditions to the right

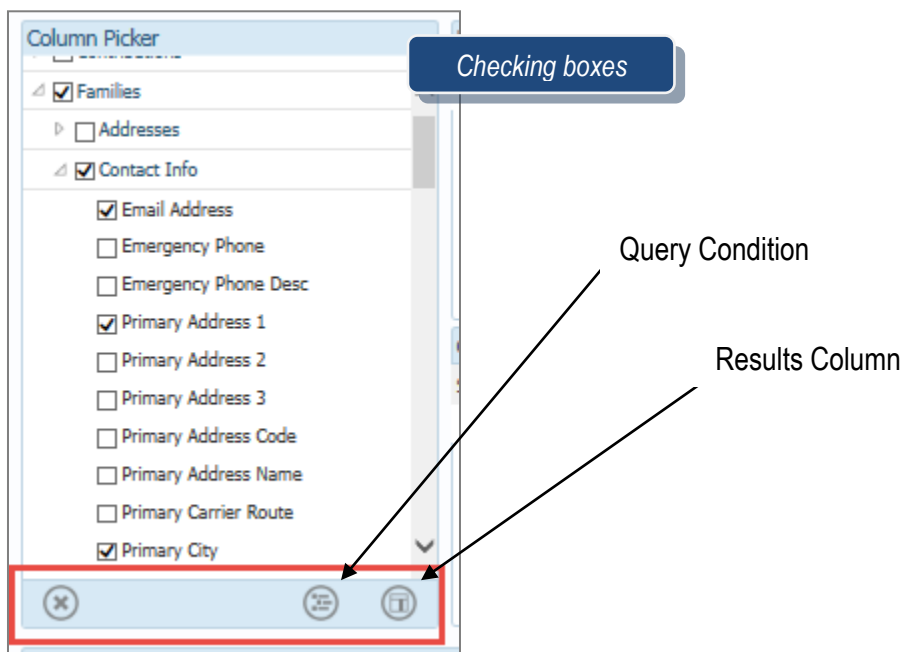
1. Add new column or add new condition (works the same for both)
  - a. Click **Add New Column** link
  - b. Click on **Families**
  - c. Move cursor to the right and click **Last Name**

The screenshot displays the ParishSOFT Family Suite Intelligent Query interface. At the top, there are navigation tabs for Home, Family Directory, Religious Education, Offering, and Ministry Scheduler. Below this is the 'Query Builder' section, which includes a search bar and a list of categories. A yellow circle with the number '1' highlights the search bar, and a yellow circle with the number '2' highlights the 'Families' category. The 'Result Columns' list on the right has a yellow circle with the number '3' highlighting the 'Last Name' option. A blue callout box on the right says 'Add new column'. The interface also shows a 'Query Results' section at the bottom with a 'Return All results' button and a 'No Query Results' message.

2. Dragging and dropping from the Column Picker
  - a. Click the **triangle** next to Families
  - b. Scroll down to First Names
  - c. Click on **First Names** and drag it to the Results Column



3. Checking the boxes in the Column Picker
  - a. Click **triangle** icon next to: Email Address, Primary Address 1
  - b. Add them to the column by clicking on the **Results Column icon**



## Query 1 exercise

- a) Results Column
  - a. Families>Last Name
    - i. Change Title to Last Name and sort by this field
  - b. Families>First Names
  - c. Families>Contact Info>Email Address
  - d. Families>Contact Info>Primary Address 1
  - e. Families>Contact Info>Primary City
  - f. Families>Contact Info>Primary Postal Code
  - g. Families>Contact Info>Primary State
  - h. Families>Owner Organization>Organization ID
- b) Query Conditions
  - a. Families>Is Registered
    - i. Select Value> yes
  - b. Families>Contact Info>Primary City
    - i. leave as "starts with" >enter value of "ann"
- c) Save As
  - a. Name: Registered Families in Ann Arbor
  - b. Tag: Families

## Query 2 exercise

*Use the first query and make the following changes*

- a) Query Conditions
  - a. Families>Contact Info>Primary City
    - i. change as enter value of "ypsi"
- b) Save As
  - a. Name: Registered Families in Ypsilanti
  - b. Tag: Families

## Query 3 exercise

- a) Results Column
  - a. Members>Last Name
  - b. Members>First Name (Formal)
  - c. Members> Age
  - d. Sacraments>Baptism>Is Baptized
  - e. Sacraments>Confirmation>Is Confirmed
  - f. Families>Owner Organization>Organization ID
- b) Query Conditions
  - a. Members> Age
    - i. Change to is between>13 and 19
  - b. Sacraments>Baptism>Is Baptized
    - i. enter value>1
  - c. Add Bracket
    - i. Change Batch to Sacraments>Confirmation>Is Confirmed
      1. enter value>0
- c) Save As
  - a. Name: Youth 13-19 Baptized not confirmed
  - b. Tag: Members

## Query 4 exercise

- a) Results Column
  - a. Funds>Description
  - b. Families (or Contributions)>Family DUID
    - i. Click on the **f** and select Count
  - c. Contributions >Payment Amount
    - i. Click on the **f** and select Sum
  - d. Families>Owner Organization>Organization ID
- b) Query Conditions
  - a. Contributions>Payment Date
    - i. Click on 00:00:00 and select 1/1/2015
    - ii. click on second 00:00:00 and select today's date
- c) Save As
  - a. Name: Contributions by Fund from 2015-Now
  - b. Tag: Contributions

### QUESTIONS FROM CLASS

1. What do I do if I don't see any query results and I know there should be data?
2. Can I see and use a query that someone else created?
3. Do I have to build a similar query from scratch every time?
4. How do I use my query results to create a Workgroup?
5. How do I find queries that are marked with a Query Tag?

### TIPS & TRICKS

- In order for your Family/Member queries to find the correct data, you will need to define your Owner Organization in the query itself
- The open circle to the right of each Query Condition can be clicked to disable/enable that particular condition
- You can drag and drop each Column or Condition up and down in the list to adjust the order
- Remember to click the X icon at the bottom of the Column Picker window after moving fields over to the right, so as to not duplicate on accident

### ANSWER KEY

1. *Toggle your Query Conditions off clicking on the little circle. Execute the query and turn them back on one by one.*
2. *Yes. Click on My Queries and any that are Global will be available for you to click on.*
3. *No. Open an existing query, alter and Save As.*
4. *Execute the query, hover over Query Results menu, then select to create*
5. *Click on My Queries, then pull down menu to check boxes next to desired tags*