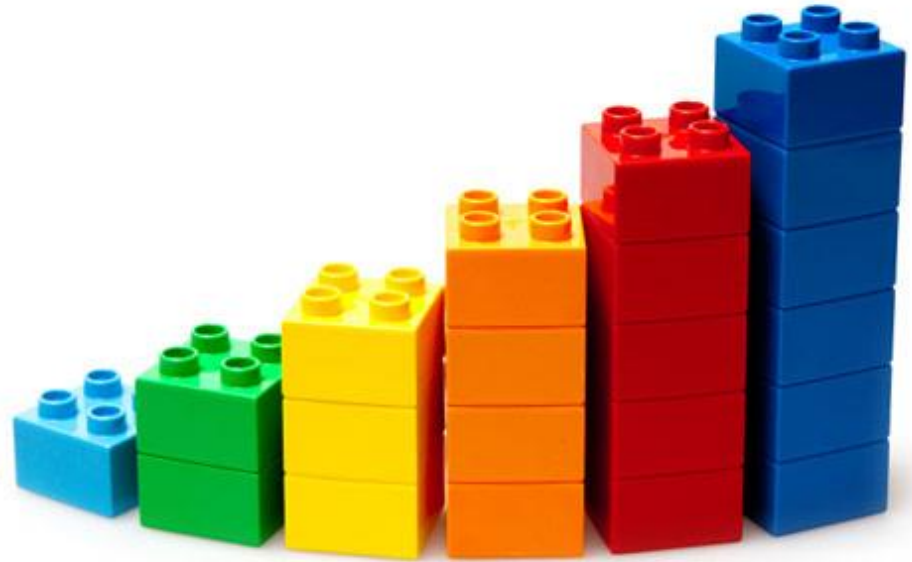


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Architecting Your Data Extracts with the Query Tool

2016 DDI User Group Conference



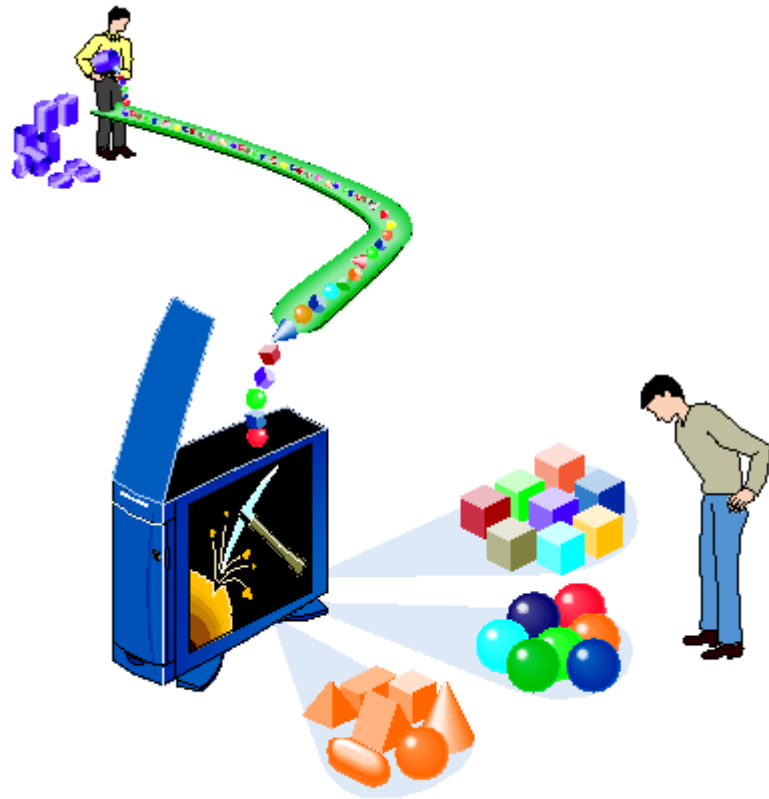
Query Tool Overview

- Why use Query Tool
- Query Tool Setup
- How to create and run a Export options
- Hands On Workshop
- Questions/comments



Why Use the Query Tool

- Data Extract
- Report Supplement



Query Tool Data Sources

Main Data Sources:

- Name/Address
- Investment & Loan System
- FundRaiser
- FundWriter

Select a data source to add to the query:

- Name/Address
- Investment & Loan System
- FundRaiser
- FundWriter

Query Tool Data Sources

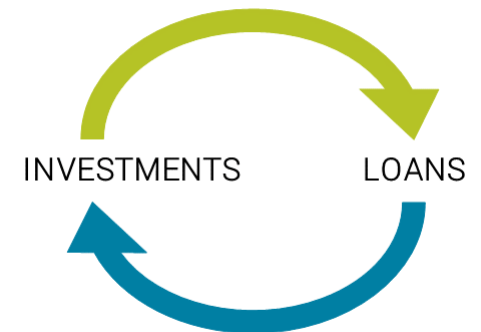
Name/Address

- Name/Address
 - Constituents
 - Master Accounts
 - Contact information
 - Memos
 - Projects
 - Alternate ID
 - Contact history
 - Bulk mail
 - Committees
 - Committee officer mail
 - Countries
 - States
 - Regions
 - Areas
 - Cities
 - Postal codes
 - Counties
 - Account Information Codes



Investment & Loan

- Investment & Loan System
 - Loans
 - Correspondents
 - Loan types
 - Transactions
 - Loan fee types
 - Loan payment requests
 - Loan tickler records
 - Loan guarantees
 - Cash receipt batches
 - Cash receipts
 - Investments
 - Investment categories
 - Investment types
 - Investment state sales
 - Investment state sales by type
 - Investment state sales by type/year
 - Portfolios
 - Portfolio types
 - Lines of credit



Query Tool Data Sources

FundRaiser

- FundRaiser
 - Donor accounts
 - Donor transactions
 - Gifts
 - Miscellaneous revenue
 - Recurring gifts
 - Gift detail
 - Pledges
 - Pledge programs
 - Planned gifts
 - Named funds
 - Campaigns
 - Appeals
 - Campaign groups
 - Events
 - Event receipts
 - Programs
 - Local allocations

FundWriter (GL)

- FundWriter
 - General ledger transactions
 - Subsystem G/L transactions



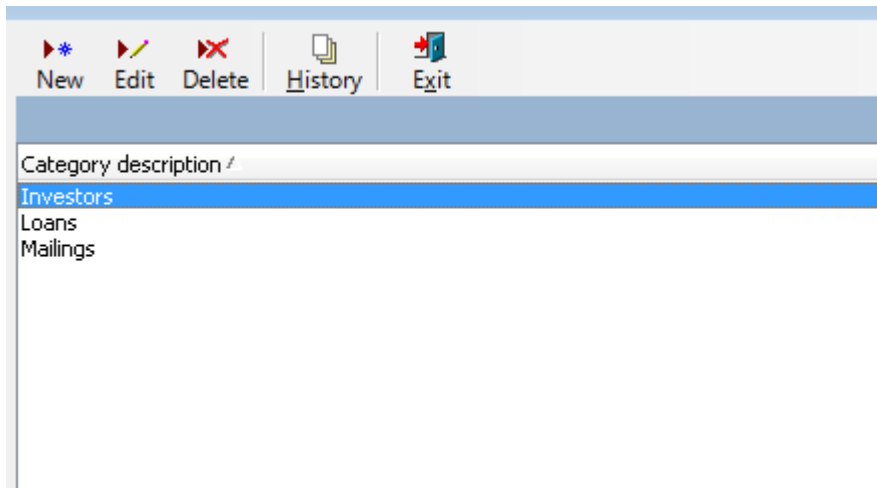
Limitations



- Data in the Query Tool is real time. Transaction activity is the only historical data
- AI Codes can be difficult to use
- Queries are not schedulable like in the Information Query

Setup

- Extract Module → Setup → Query Category Maintenance
 - Add categories to help organize your queries

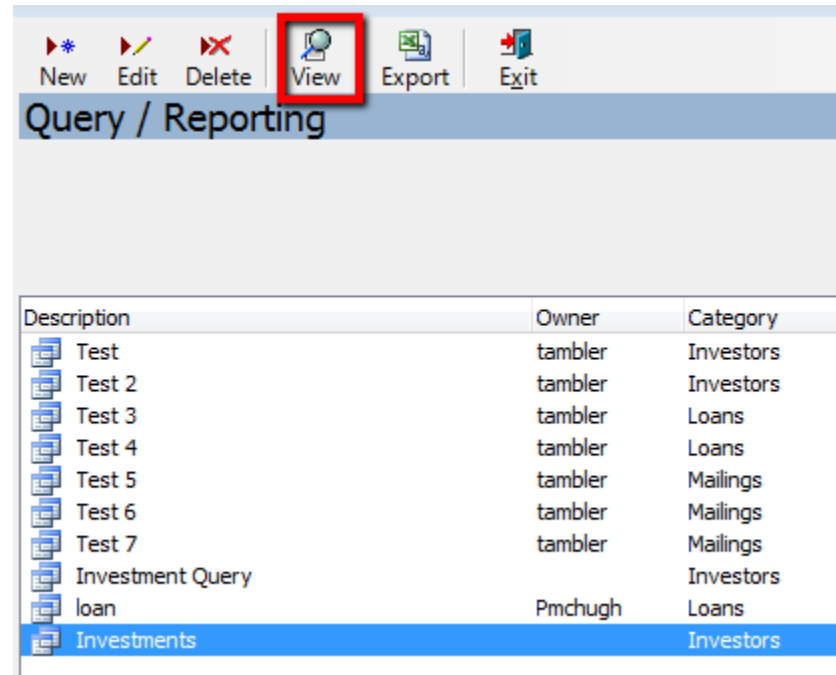


A screenshot of the Query Category Maintenance window showing a table of queries. The table has three columns: 'Description', 'Owner', and 'Category /'. The 'Category /' column is highlighted with a red box. The table contains the following data:

Description	Owner	Category /
Test	tambler	Investors
Test 2	tambler	Investors
Investment Query		Investors
Investments		Investors
Test 3	tambler	Loans
Test 4	tambler	Loans
loan	Pmchugh	Loans
Test 5	tambler	Mailings
Test 6	tambler	Mailings
Test 7	tambler	Mailings

Screen Layout View

- Runs the query and displays results

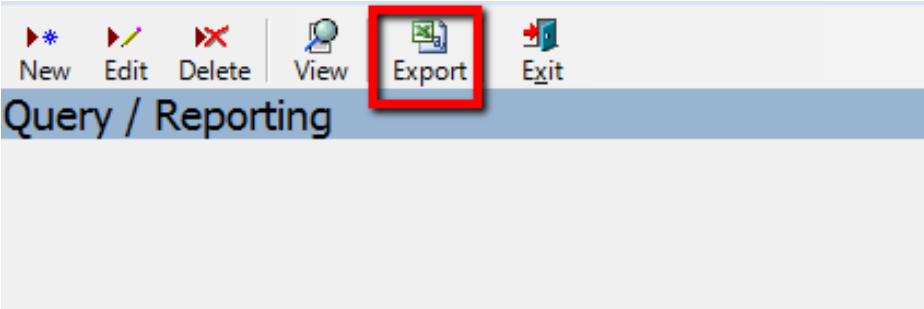


The screenshot shows a software interface with a toolbar at the top containing buttons for 'New', 'Edit', 'Delete', 'View', 'Export', and 'Exit'. The 'View' button is highlighted with a red box. Below the toolbar is a header 'Query / Reporting' and a table with three columns: 'Description', 'Owner', and 'Category'. The table contains the following data:

Description	Owner	Category
Test	tambler	Investors
Test 2	tambler	Investors
Test 3	tambler	Loans
Test 4	tambler	Loans
Test 5	tambler	Mailings
Test 6	tambler	Mailings
Test 7	tambler	Mailings
Investment Query		Investors
loan	Pmchugh	Loans
Investments		Investors

Screen Layout Export

- Provides options of which file type to export the data

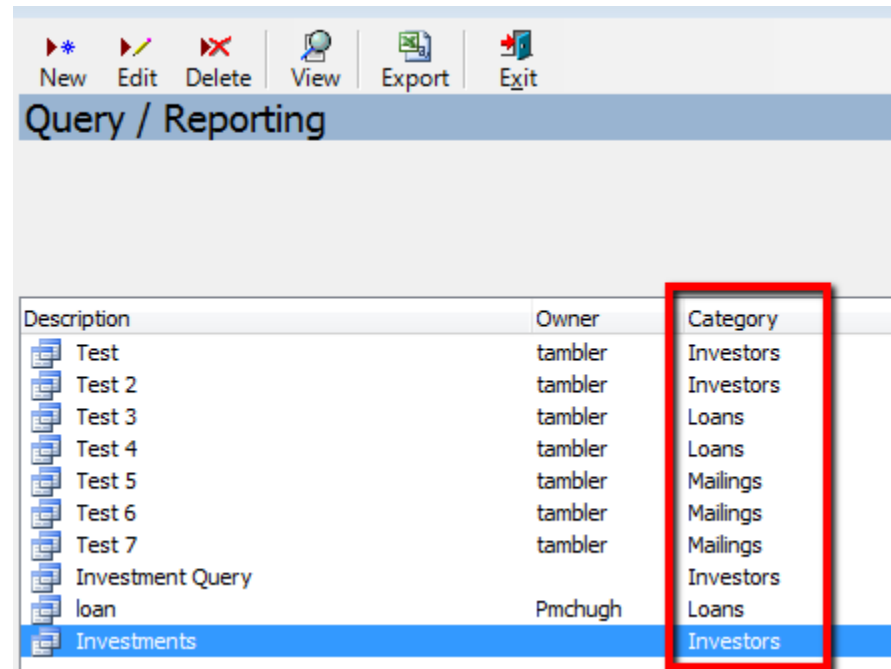


The screenshot shows a software interface with a menu bar at the top. The menu items are 'New', 'Edit', 'Delete', 'View', 'Export', and 'Exit'. The 'Export' menu item is highlighted with a red rectangular box. Below the menu bar is a header 'Query / Reporting'. Underneath is a table with three columns: 'Description', 'Owner', and 'Category'. The table contains several rows of data, with the last row, 'Investments', highlighted in blue.

Description	Owner	Category
Test	tambler	Investors
Test 2	tambler	Investors
Test 3	tambler	Loans
Test 4	tambler	Loans
Test 5	tambler	Mailings
Test 6	tambler	Mailings
Test 7	tambler	Mailings
Investment Query		Investors
loan	Pmchugh	Loans
Investments		Investors

Screen Layout

- Category: Not a required field. Can filter by Category.

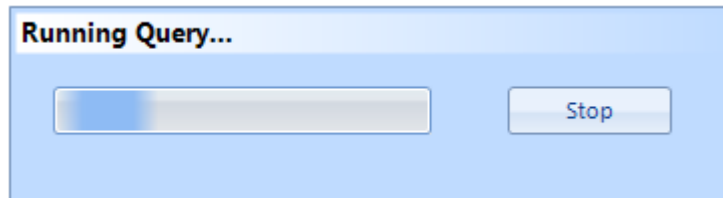


The screenshot shows a software interface with a menu bar at the top containing 'New', 'Edit', 'Delete', 'View', 'Export', and 'Exit'. Below the menu bar is a header 'Query / Reporting'. The main area contains a table with three columns: 'Description', 'Owner', and 'Category'. The 'Category' column is highlighted with a red box. The table data is as follows:

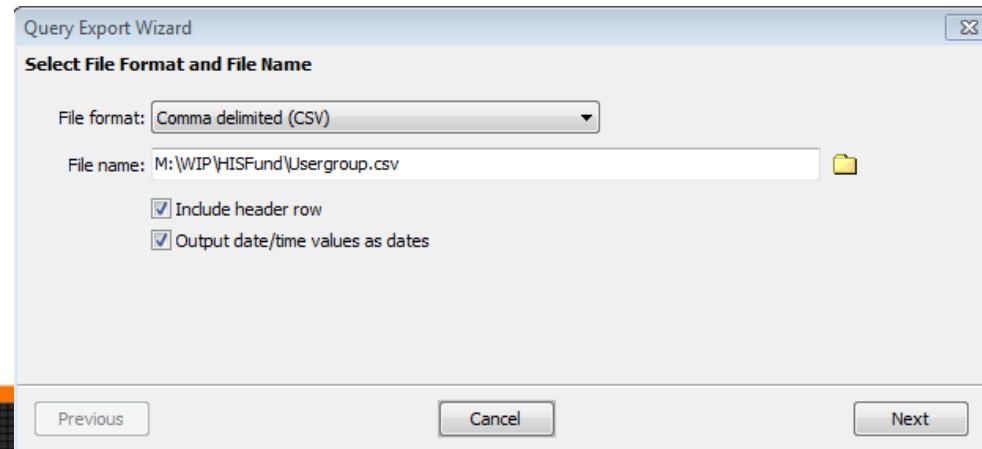
Description	Owner	Category
Test	tambler	Investors
Test 2	tambler	Investors
Test 3	tambler	Loans
Test 4	tambler	Loans
Test 5	tambler	Mailings
Test 6	tambler	Mailings
Test 7	tambler	Mailings
Investment Query		Investors
loan	Pmchugh	Loans
Investments		Investors

View vs Export

- View runs the query displays the results. Exporting the data is available from the File menu.

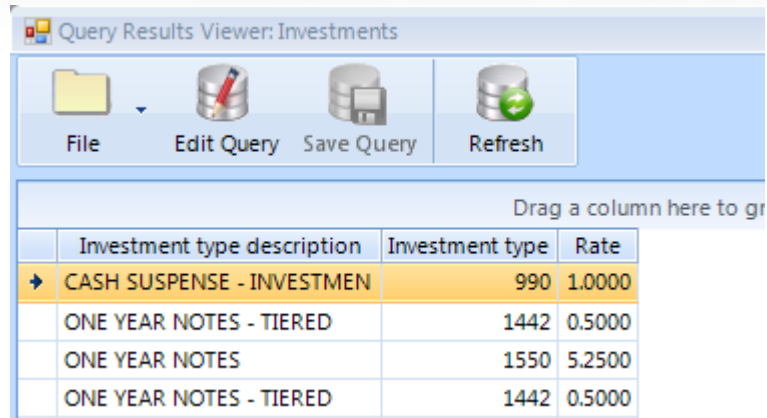


- The Export option opens the prompt to select which format to export the data



View

- Results



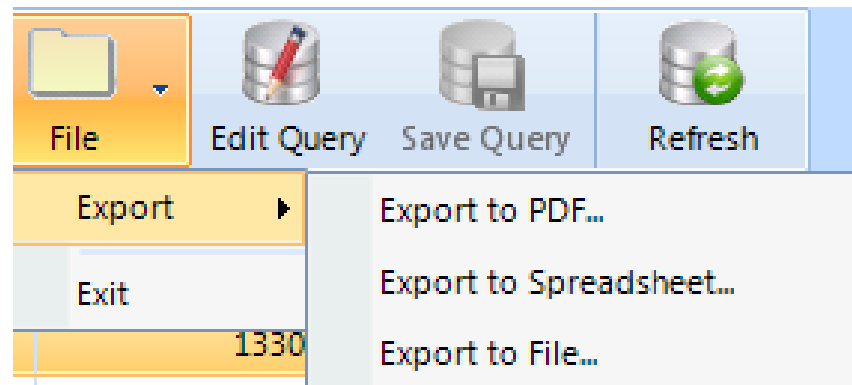
Query Results Viewer: Investments

File Edit Query Save Query Refresh

Drag a column here to gr

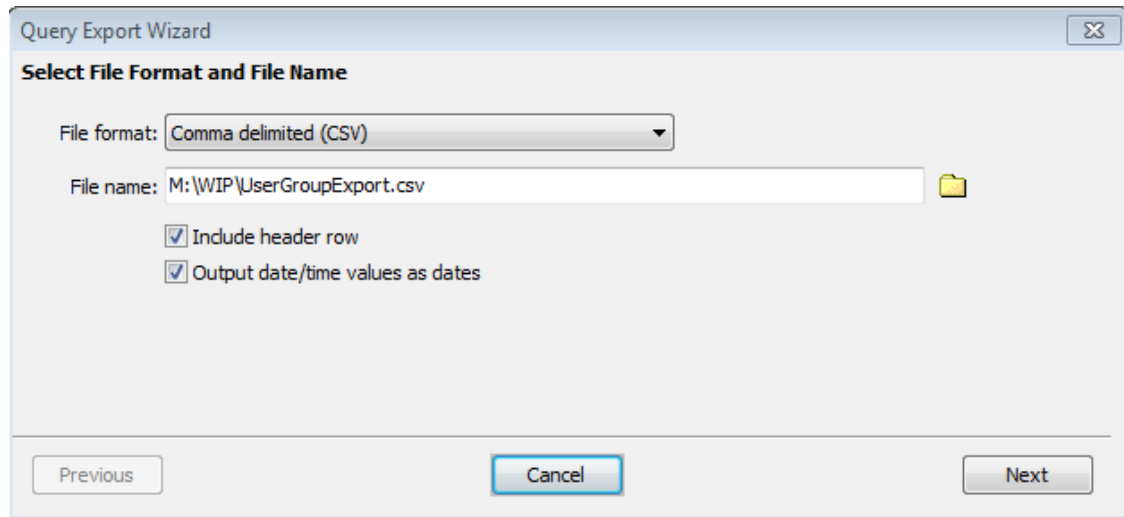
	Investment type description	Investment type	Rate
→	CASH SUSPENSE - INVESTMEN	990	1.0000
	ONE YEAR NOTES - TIERED	1442	0.5000
	ONE YEAR NOTES	1550	5.2500
	ONE YEAR NOTES - TIERED	1442	0.5000

- Export



Export

- Select a file format
 - Comma delimited (CSV)
 - Tab delimited
 - XML*
 - JSON*



*XML AND JSON are not widely used. Please contact Support if you have questions about using these file types.



Query Tool

2016 DDI User Group Conference



Creating a New Query

1. Name the query
2. Select query type
3. Select criteria
4. Select columns to output
5. Select the sort order (optional)
6. View/Export your new query



Sample Query Single Table

The screenshot displays the 'Query Editor' window. At the top, the title bar reads 'Query Editor' with standard window controls. Below the title bar is a blue header area with a database icon and the text 'Data Sources'. The main workspace is divided into two sections. On the left, under the heading 'Query Data Sources', there is an empty rectangular box. On the right, under the heading 'Select a data source to add to the query:', there is a list of data sources. At the top of this list is a folder icon labeled 'Name/Address', which is expanded to show a list of tables: Constituents, Master Accounts, Contact information, Memos, Projects, Alternate ID, Contact history, Bulk mail, Committees, Committee officer mail, Countries, States, Regions, Areas, Cities, Postal codes, and Counties. Below this list are two more folders: 'Investment & Loan System' and 'FundRaiser'. Above the list, there is a checkbox labeled 'Allow all users to run this query' which is checked. To the left of this checkbox, there is a text input field for 'Query name:' containing the text 'Hands On Single Table' and a dropdown menu for 'Category:' set to 'Mailings'.

Query Editor

Data Sources

Query name: Hands On Single Table Allow all users to run this query

Category: Mailings

Query Data Sources

Select a data source to add to the query:

- Name/Address
 - Constituents
 - Master Accounts
 - Contact information
 - Memos
 - Projects
 - Alternate ID
 - Contact history
 - Bulk mail
 - Committees
 - Committee officer mail
 - Countries
 - States
 - Regions
 - Areas
 - Cities
 - Postal codes
 - Counties
 - Account Information Codes
- Investment & Loan System
- FundRaiser

Sample Query Single Table

The image shows a screenshot of a software interface with two overlapping windows. The background window is titled 'Query Editor' and has a blue header with a database icon and the text 'Select Query Type'. Below the header, it says 'Name/Address: Constituents'. There are several radio button options under 'Query type:':

- All rows
- Distinct rows
- First row
- Summary row
- Grouped rows

The foreground window is also titled 'Query Editor' and has a blue header with a database icon and a funnel icon, with the text 'Selection Criteria'. Below the header, it says 'Name/Address: Constituents'. There are buttons for 'Add', 'Edit', 'Edit Value', and 'Delete'. A list of fields is on the left, with 'Acct type' selected. To the right of the list are buttons for logical operators: '=', '>', '<', '>=', '<=', 'EMPTY', 'NOT EMPTY', 'RANGE', 'BEGINS', 'MATCHES', 'LIST', 'INCLUDES', 'EXCLUDES', '(', ')', 'AND', and 'OR'. A table below these buttons shows a single row:

	Column	Condition	Value
1	Acct type	=	

At the bottom of the foreground window, there is a text field containing 'Acct type =' and a dropdown menu with 'Church' selected. To the right of this is a checkbox labeled 'Prompt at runtime' which is checked. At the bottom right are 'OK' and 'Cancel' buttons.

Sample Query Single Table

Query Editor

Select Columns to Output

Name/Address: Constituents

Available Output Columns

- Last name
- Suffix
- Gender
- Gender description
- AI Code
- AI Code Description
- Source code
- Name 2
- Tax ID
- Modification date
- Deletion code
- Deletion code description
- Deletion date
- Correspondence preference
- Ethnicity list
- Ethnicity code
- Ethnicity description
- Denomination list
- Denomination code
- Denomination description
- Salutation
- DBA name
- Home email
- Work email
- Home phone
- Work phone
- Mobile phone
- Fax
- Website
- Is tax exempt
- Tax exempt verify dt

Add >

< Remove

Selected Output Columns

Column	Function
1 PIN	
2 Acct type	
3 Acct type description	
4 Preferred email	
5 Preferred phone	
6 Creation date	Month
7 Creation date	Day
8 Creation date	Calendar Year

Calendar Year

- Calendar Year
- Quarter
- Month
- Day
- Year/Quarter
- Year/Month
- Fiscal Year
- Fiscal Quarter
- Fiscal Period
- Fisc. Year/Quarter
- Fisc. Year/Period

Sample Query Single Table

The image shows a screenshot of a Query Editor application. The main window is titled "Query Editor" and has a blue header bar. Below the header, there are two panels:

- Select Sort Order:** This panel is on the left. It has a title bar with a database icon and a dropdown arrow. Below the title bar, it says "Name/Address: Constituents". Underneath, there is a list of "Available Sort Columns": PIN, Acct type, Acct type description, Creation date, and another Creation date. To the right of this list are two buttons: "Add >" and "< Remove".
- Data Sources:** This panel is on the right. It also has a title bar with a database icon and a book icon. Below the title bar, it says "Data Sources". There are two input fields: "Query name: Hands On Single Table" and "Category: Mailings". To the right of the "Query name" field is a checkbox labeled "Allow all users to run this query" which is checked. Below these fields are two buttons: "Edit" and "Remove".

At the bottom of the "Data Sources" panel, there are two main sections:

- Query Data Sources:** This section contains a single entry: "Constituents" with a purple cube icon to its left.
- Select a data source to add to the query:** This section contains a list of two items: "Name/Address" and "FundRaiser", each with a yellow folder icon to its left.

At the bottom center of the "Data Sources" panel, there is a button labeled "Finish" which is highlighted with a red rectangular border. To the right of this button, there is a partially visible button labeled "Next".


Sample Query Single Table

The screenshot shows a software interface with a menu bar containing 'New', 'Edit', 'Delete', 'View', 'Export', and 'Exit'. The 'View' menu item is highlighted with a red box. Below the menu bar is a 'Query / Reporting' section. On the left, there is a tree view with items like 'Test 1' through 'Test 7', 'Investment Query', 'loan', 'Investments', 'Hands On Multiple Tables', and 'Hands On Single Table'. The 'Hands On Single Table' item is selected. In the center, there is a 'Run-time Query Criteria' dialog box with a dropdown menu showing 'Church' selected. Below the dialog box is a 'Query Results Viewer: Hands On Single Table' window. This window has a toolbar with 'File', 'Edit Query', 'Save Query', and 'Refresh' buttons. Below the toolbar is a table with the following data:

	PIN	Acct type	Acct type description	Preferred email	Preferred phone	Creation date	Creation date	Creation date
▶	38	C	Church			8	5	1996
	260005	C	Church			8	15	1981
	520001	C	Church			8	15	1981
	520002	C	Church			8	15	1981
	520003	C	Church			8	15	1981
	520004	C	Church			8	15	1981
	520005	C	Church			8	15	1981
	520006	C	Church			8	15	1981
	520021	C	Church			8	15	1981

Sample Query Multiple Tables


Query Editor

 **Data Sources**

Query name: Hands On Multiple Tables Allow all users to run this query

Category: Investors

Query Data Sources

 Constituents

Select a data source to add to the query:

- Name/Address
 - Primary address**
 - All addresses
 - Master Accounts
 - Contact information
 - Memos
 - Relationships
 - DBA (Doing Business As) names
 - Education history
 - Employment history
 - Employees
 - Online account access
 - Alternate ID
 - Contact history
 - Bulk mail
 - Committee officer mail
 - Region
- FundRaiser

Sample Query Multiple Tables

Query Editor

Selection Criteria

Name/Address: Primary address

Address line 1
Address line 2
City
State
State description
Postal code
Country code
Country description
Region
Region Description
County code
County description
Area code
Area description
City and State
Distance

= <>
> <
>= <=
EMPTY
NOT EMPTY
RANGE
BEGINS
MATCHES
LIST
INCLUDES
EXCLUDES
()
AND
OR

▶* Add | ▶/ Edit | ▶/ Edit Value | ✕ Delete

	Column	Condition	Value
1	State	=	

State =
CA

Prompt at runtime

OK Cancel

Sample Query Multiple Tables

Query Editor

Select Columns to Output

Name/Address: Primary address

Available Output Columns

- State description
- Country code
- Country description
- Region
- Region Description
- County code
- County description
- Area code
- Area description
- Full address
- City and State
- Distance

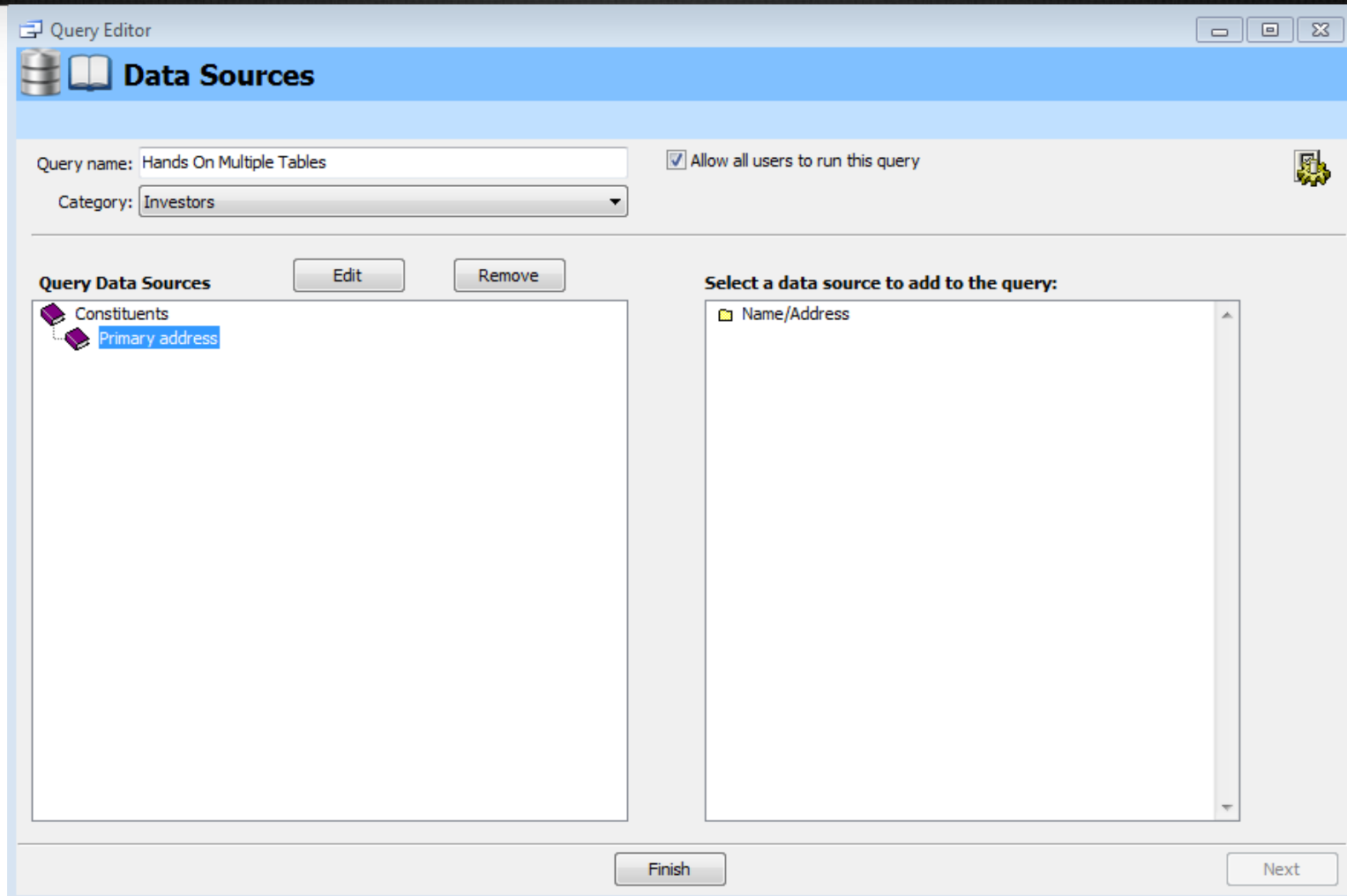
Add >

< Remove

Selected Output Columns

Column	Function
1 Address line 1	
2 Address line 2	
3 City	
4 State	All caps
5 Postal code	

Sample Query Multiple Tables



Sample Query Multiple Tables

Run-time Query Criteria

Acct type =
Church

State =
CA

OK

Query Results Viewer: Hands On Multiple Tables

File Edit Query Save Query Refresh

Drag a column here to group by this column.

	Acct type	PIN	Acct type description	Home email	Preferred phone	Creation date	Creation date	Calendar Year	
→	C	1478752	Church			11	3	1995	79
	C	50079	Church			8	15	1981	30
	C	50130	Church		(323) 698-3153	8	15	1981	Al
	C	50133	Church	khmartin53@att.net	(323) 838-1942	8	16	1996	Bc
	C	50257	Church		(323) 244-9664	11	5	1999	85
	C	50215	Church		(818) 935-6932	3	27	1991	c/k
	C	50226	Church			5	22	1997	78
	C	50300	Church		(818) 548-6205	5	18	2006	95
	C	50318	Church		(323) 637-0741	1	23	2012	69
	C	50316	Church	fleach91@juno.net	(213) 503-1295	10	17	2011	75
	C	50208	Church		(323) 242-7025	8	16	1996	21
	C	50214	Church		(213) 282-3743	3	29	1990	RF
	C	50081	Church			8	15	1981	13
	C	50129	Church	eyconner58@comcast.net	(213) 582-4567	8	15	1996	79
	C	50239	Church		(323) 421-4181	5	22	1997	67
	C	50138	Church	cukennedy71@gmail.com	(323) 891-6161	8	16	1996	30
	C	50141	Church		(323) 681-0027	8	15	1981	99

Count: 357

Reminders

- DDI can schedule a personal training session for your organization
- Remember to utilize your Touchbase meeting time for free training on topics like this
- When DDI creates queries for your organization this is billable work

Discussion, Questions, Comments

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