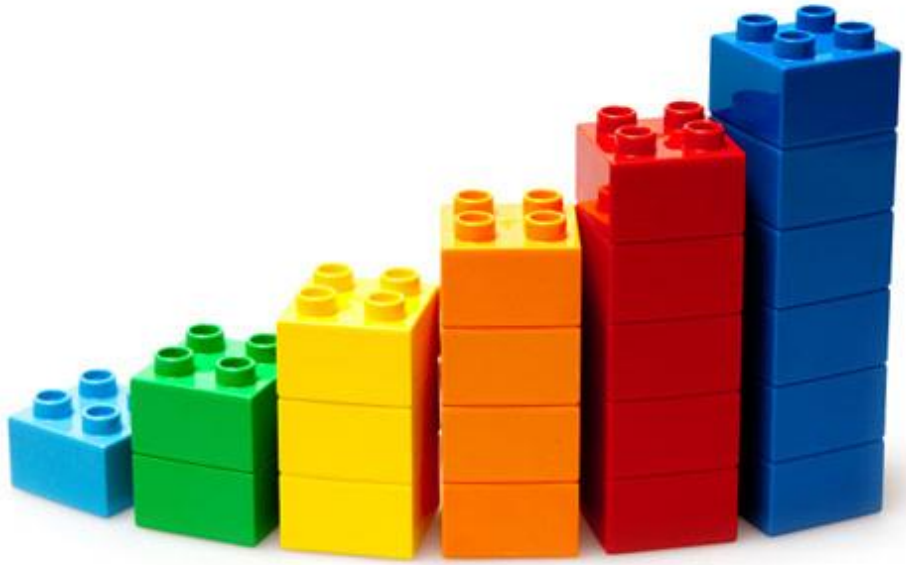


Architecting Your Data Extracts with the Query Tool

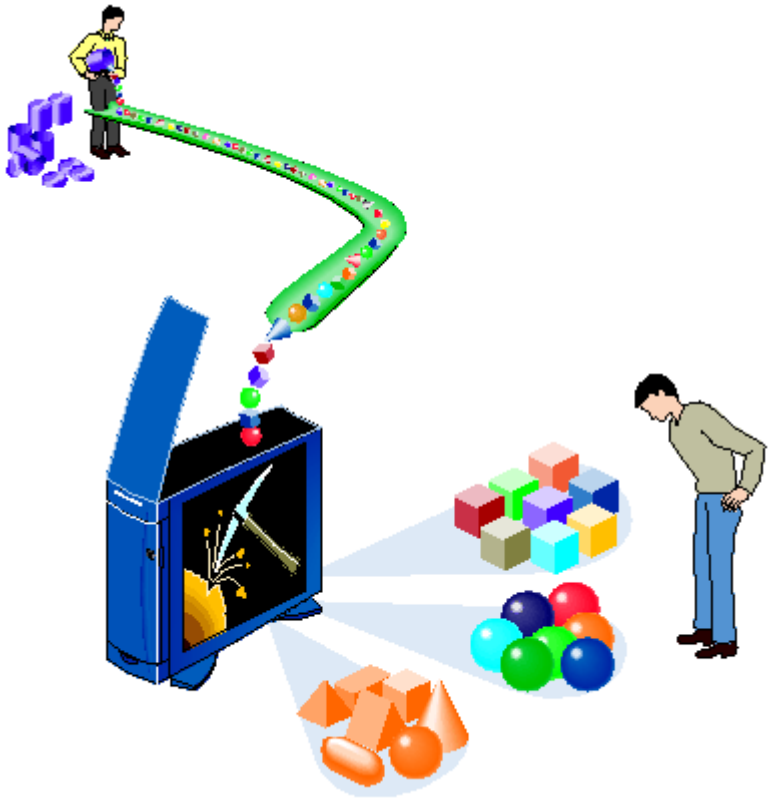
2016 DDI User Group Conference

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

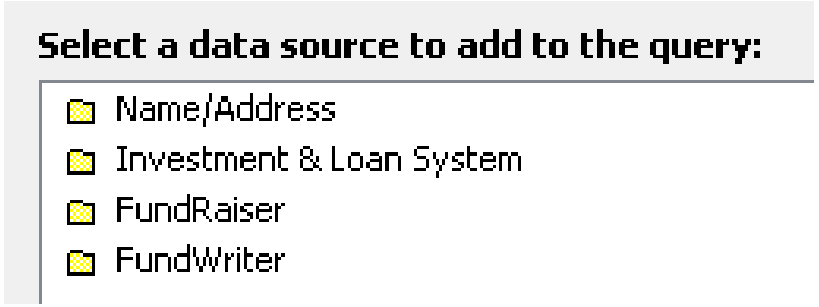
- Data Extract
- Report Supplement



Query Tool Data Sources

Main Data Sources:

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



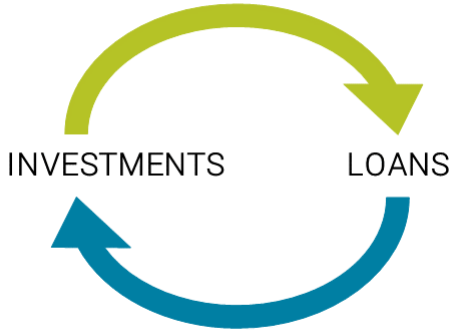
Query Tool Data Sources

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)

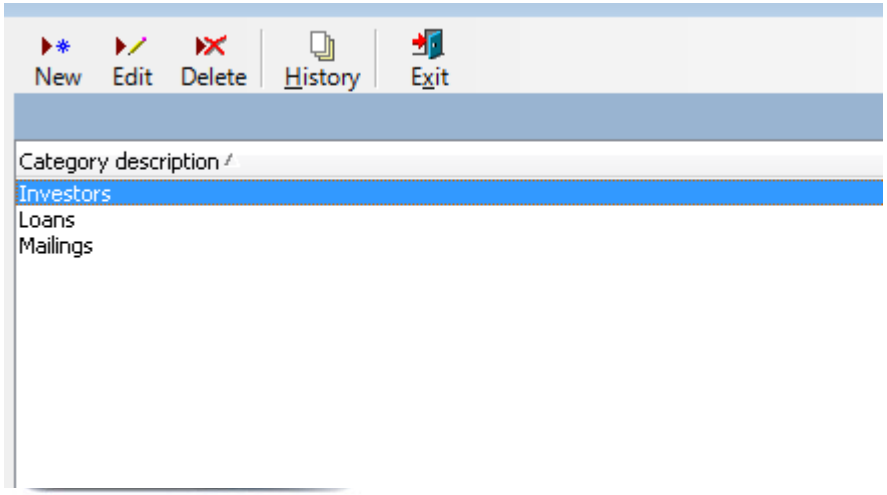
- FundWriter
  - General ledger transactions
  - Subsystem G/L transactions

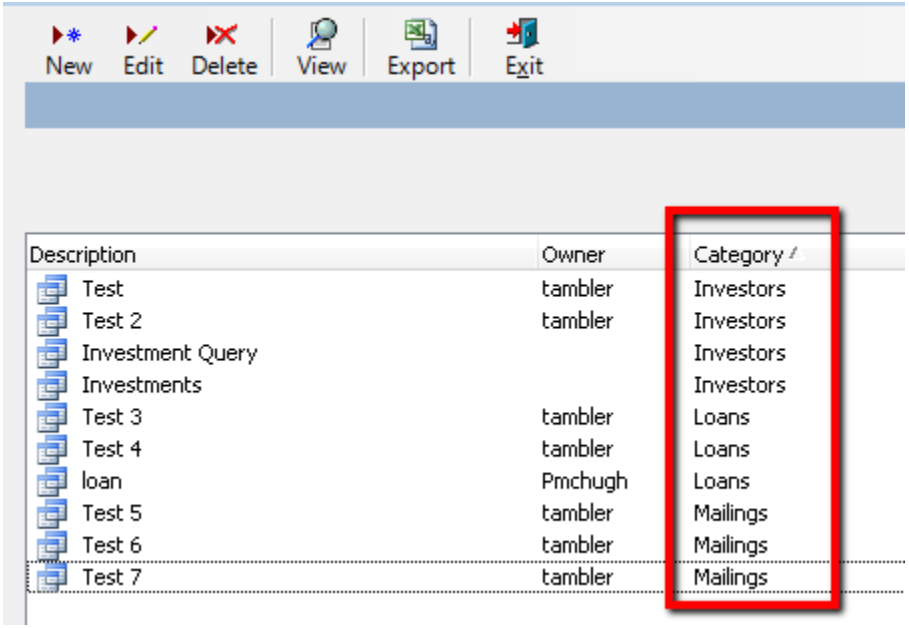
Limitations

- 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

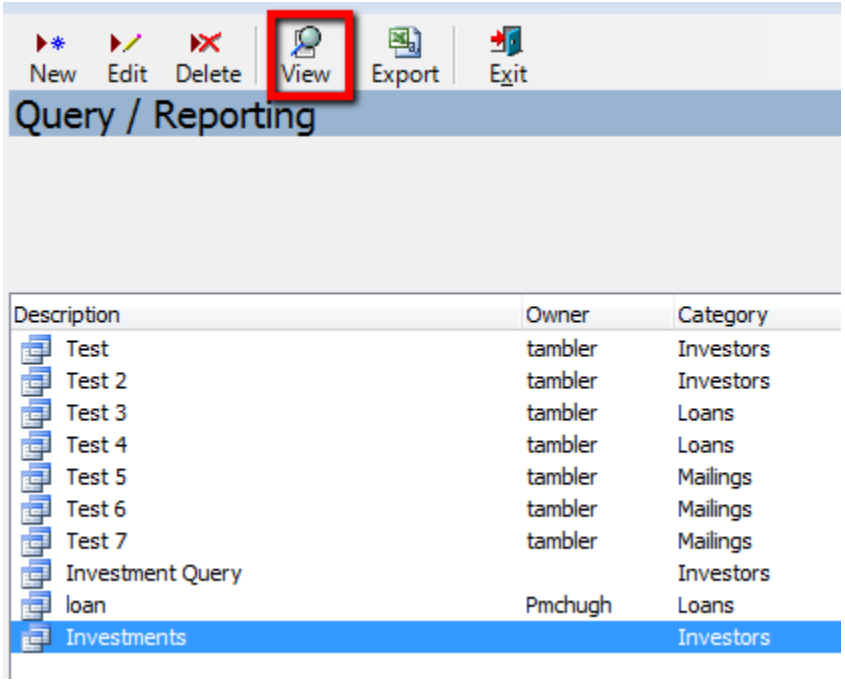
- Extract Module → Setup → Query Category Maintenance
  - Add categories to help organize your queries





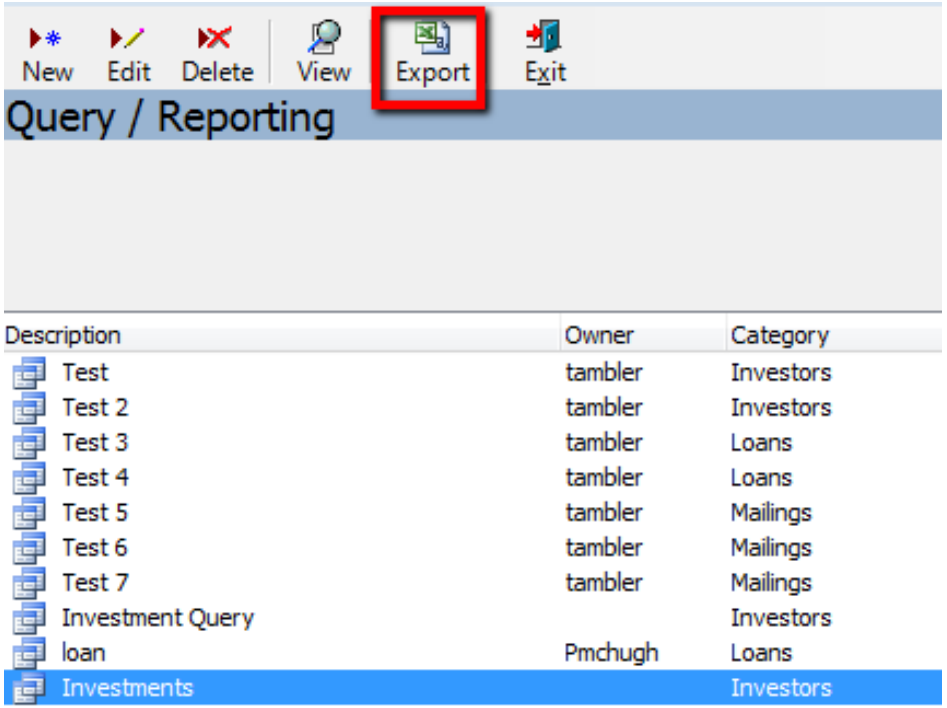
Screen Layout
View

- Runs the query and displays results



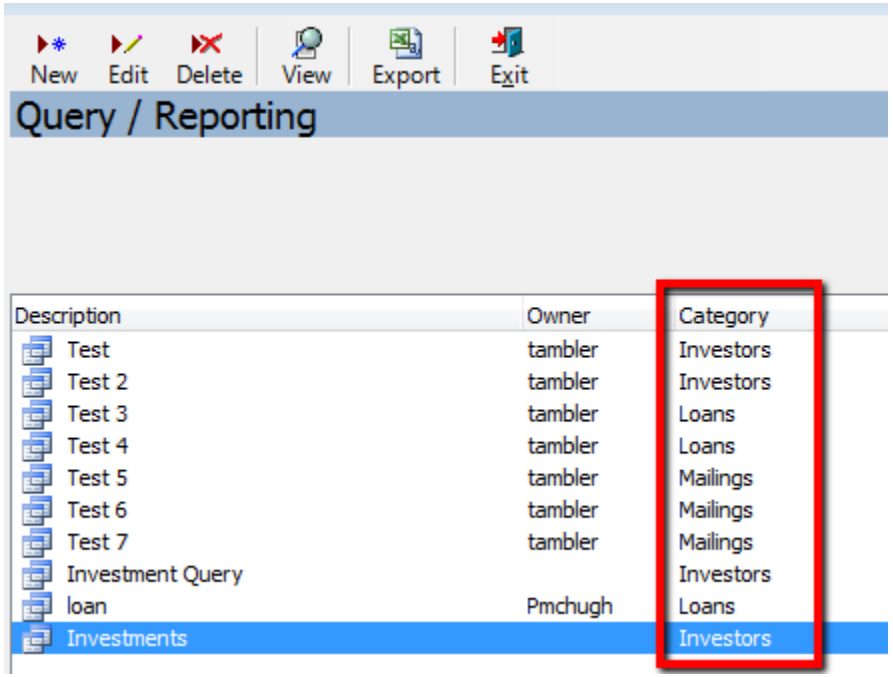
Screen Layout Export

- Provides options of which file type to export the data



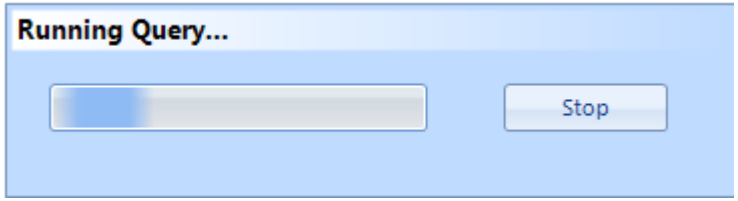
Screen Layout

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

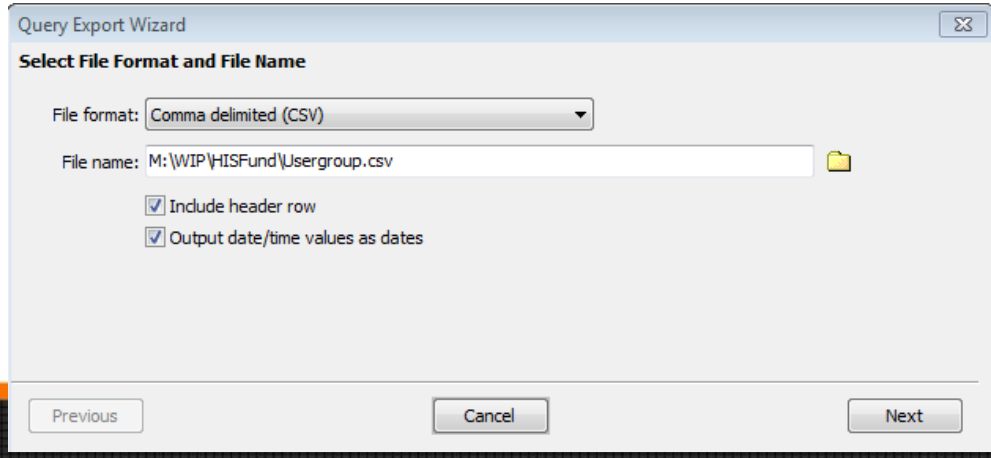


View vs Export

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

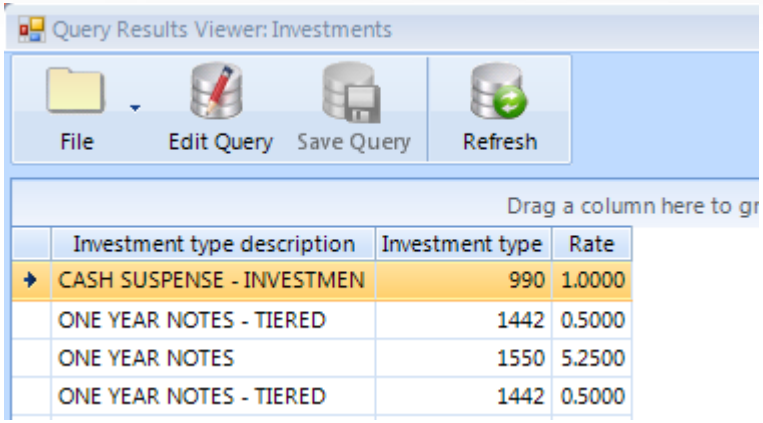


- The Export option opens the prompt to select which format to export the data

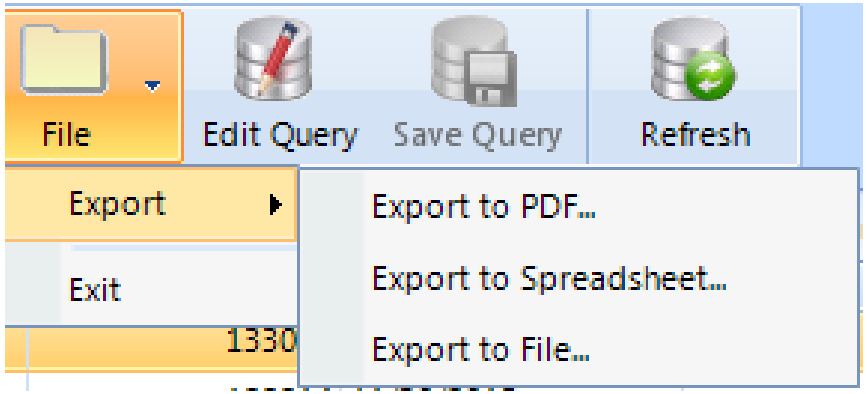


View

- Results

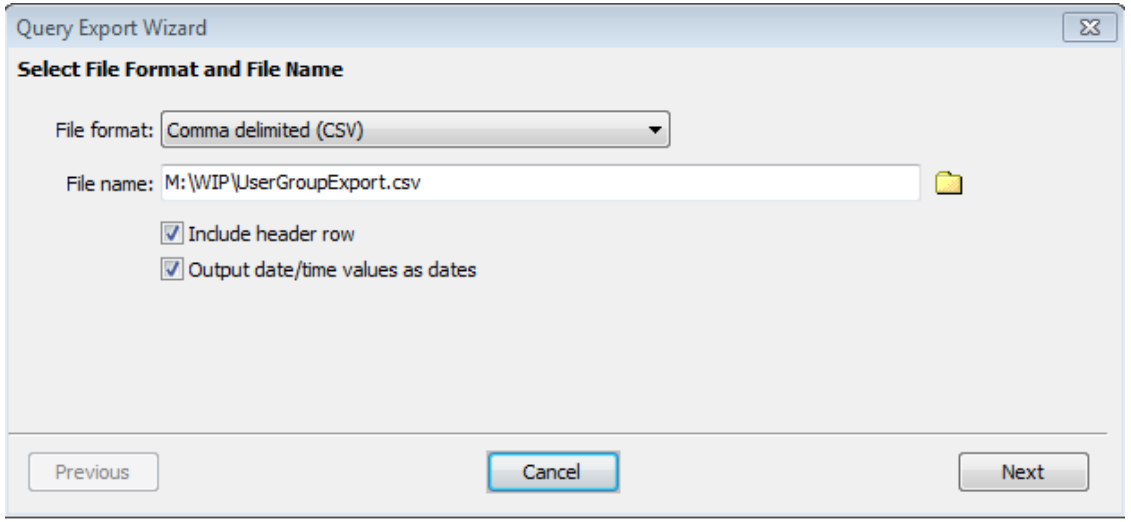


- Export



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.

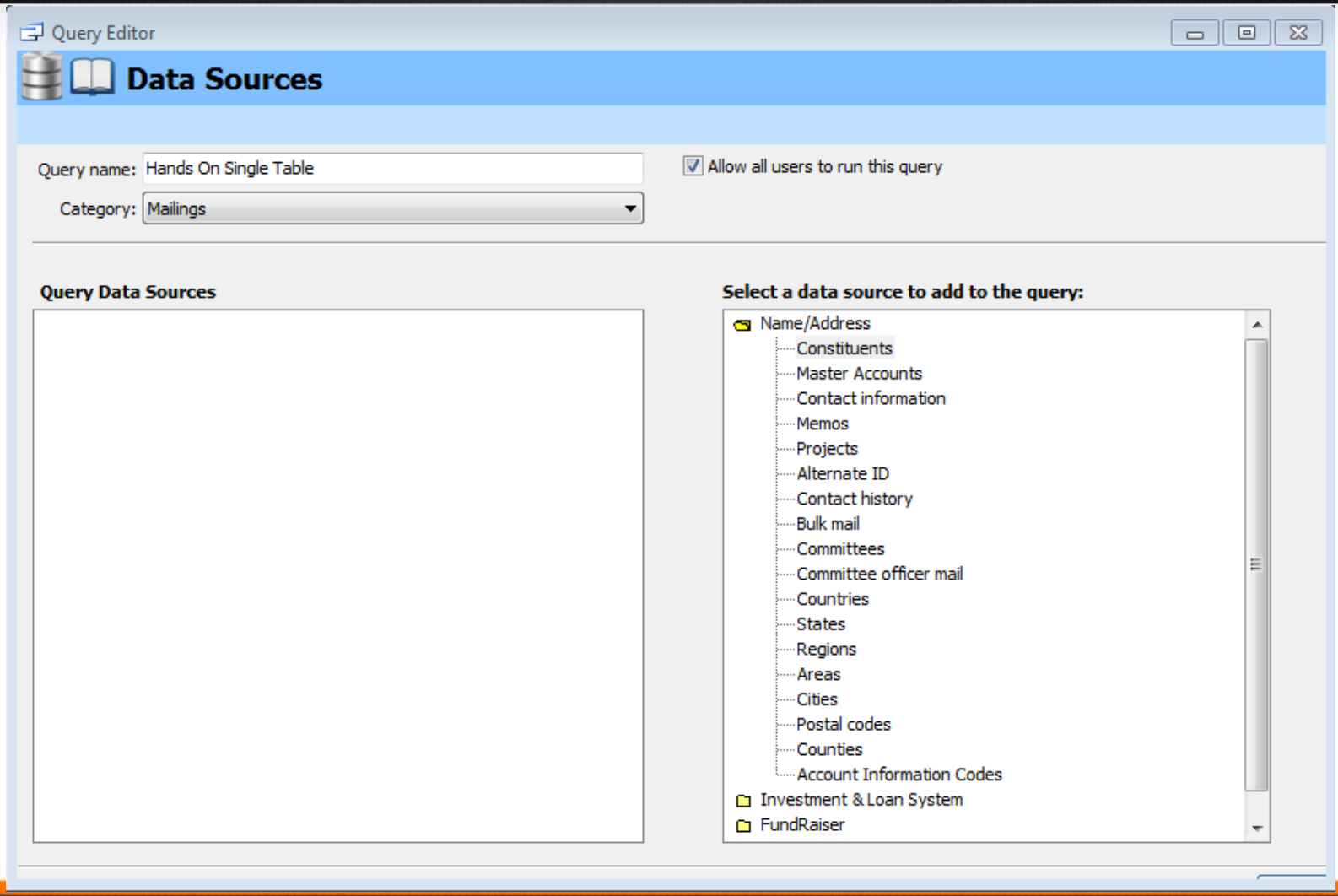
Query Tool

2016 DDI User Group Conference

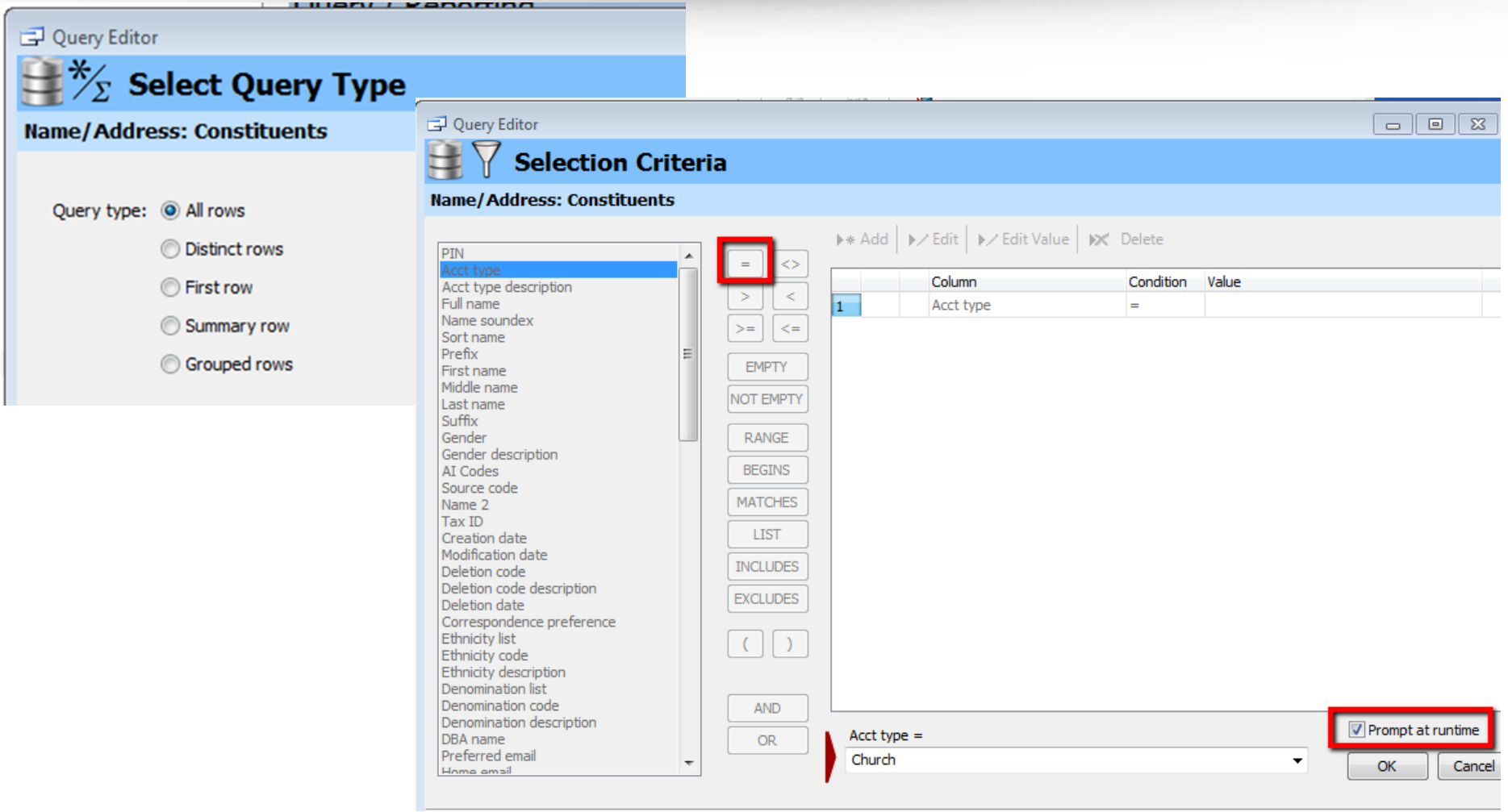
Creating a New Query

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

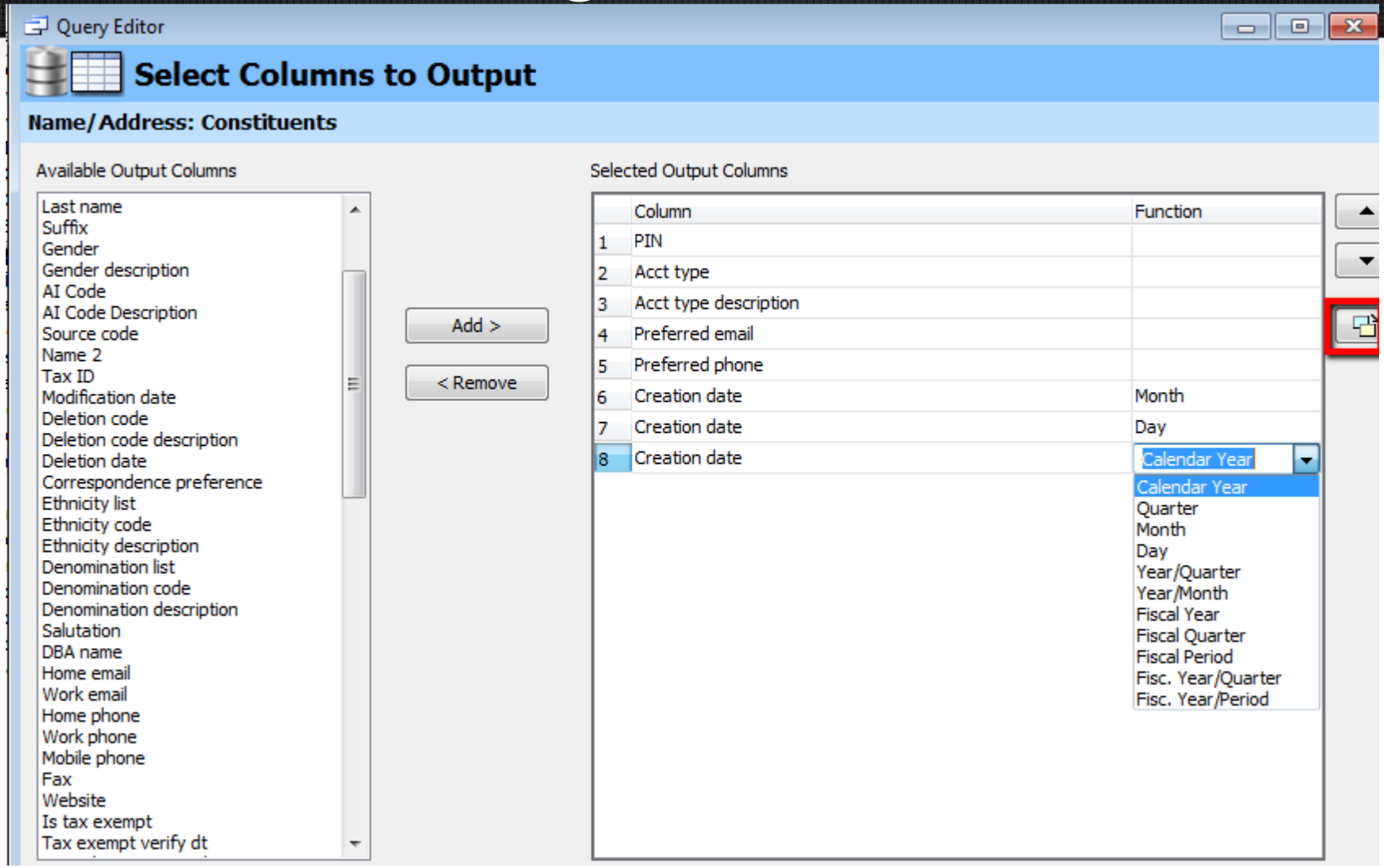
Sample Query
Single Table



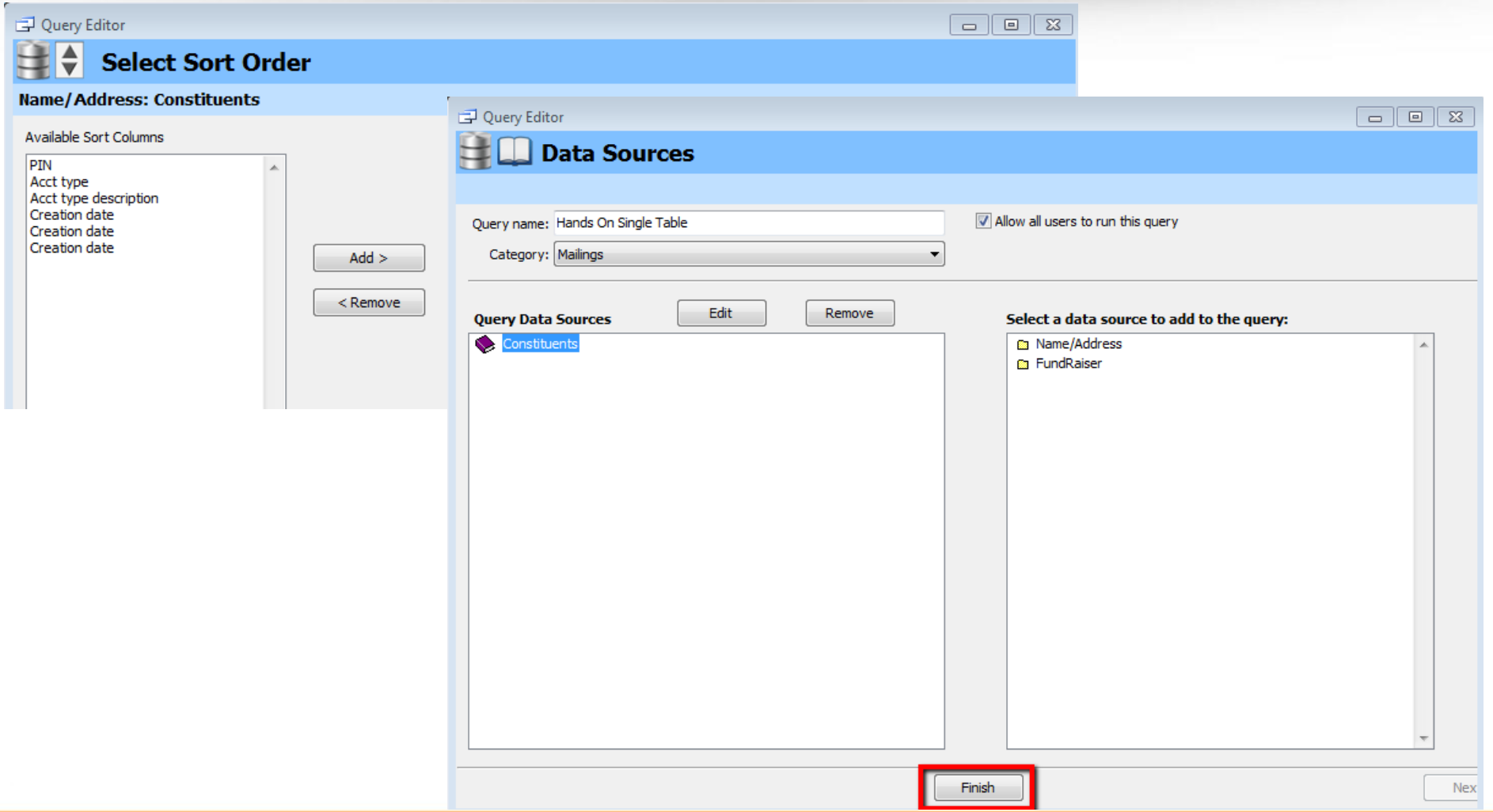
Sample Query
Single Table



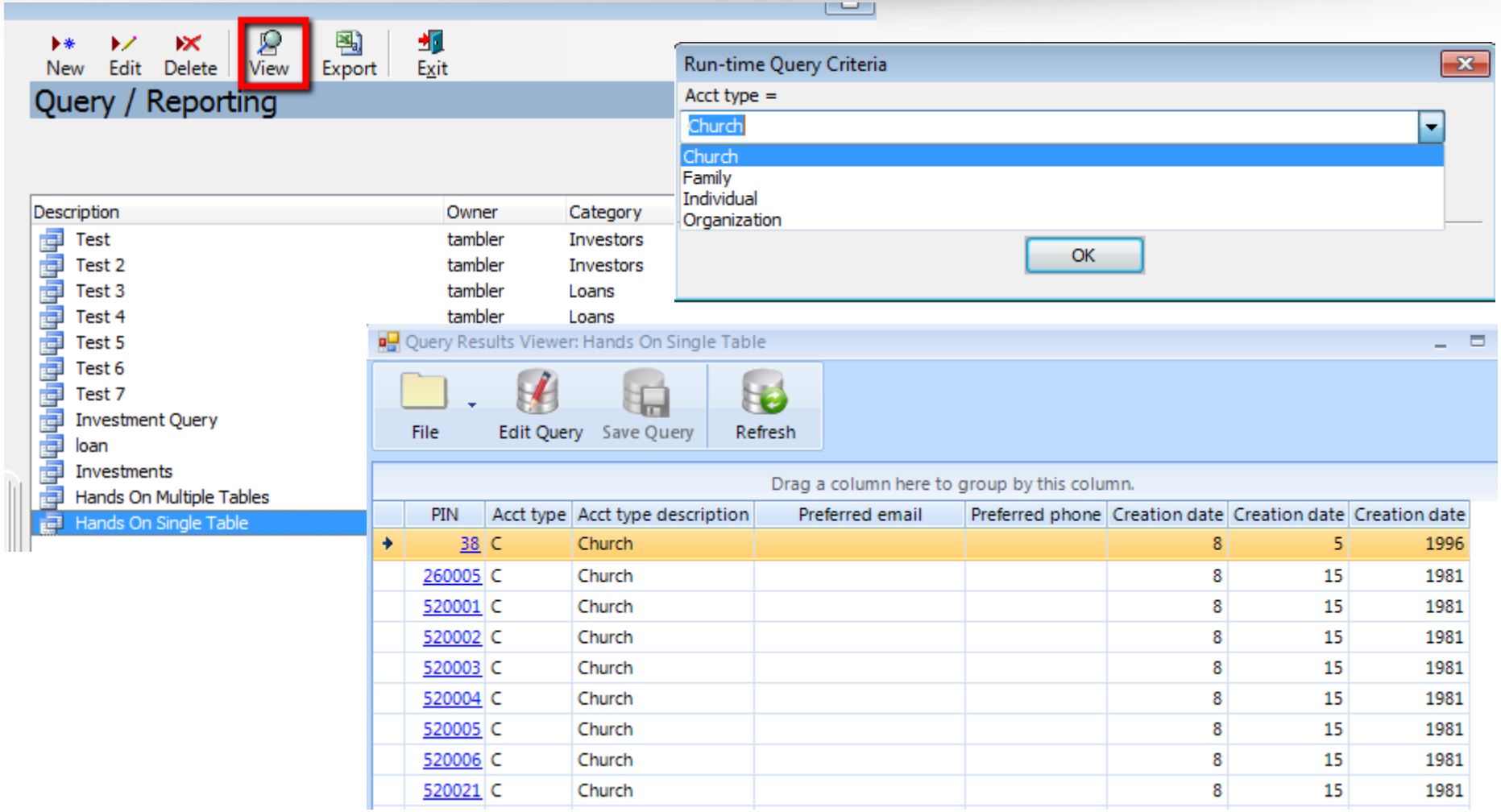
Sample Query
Single Table



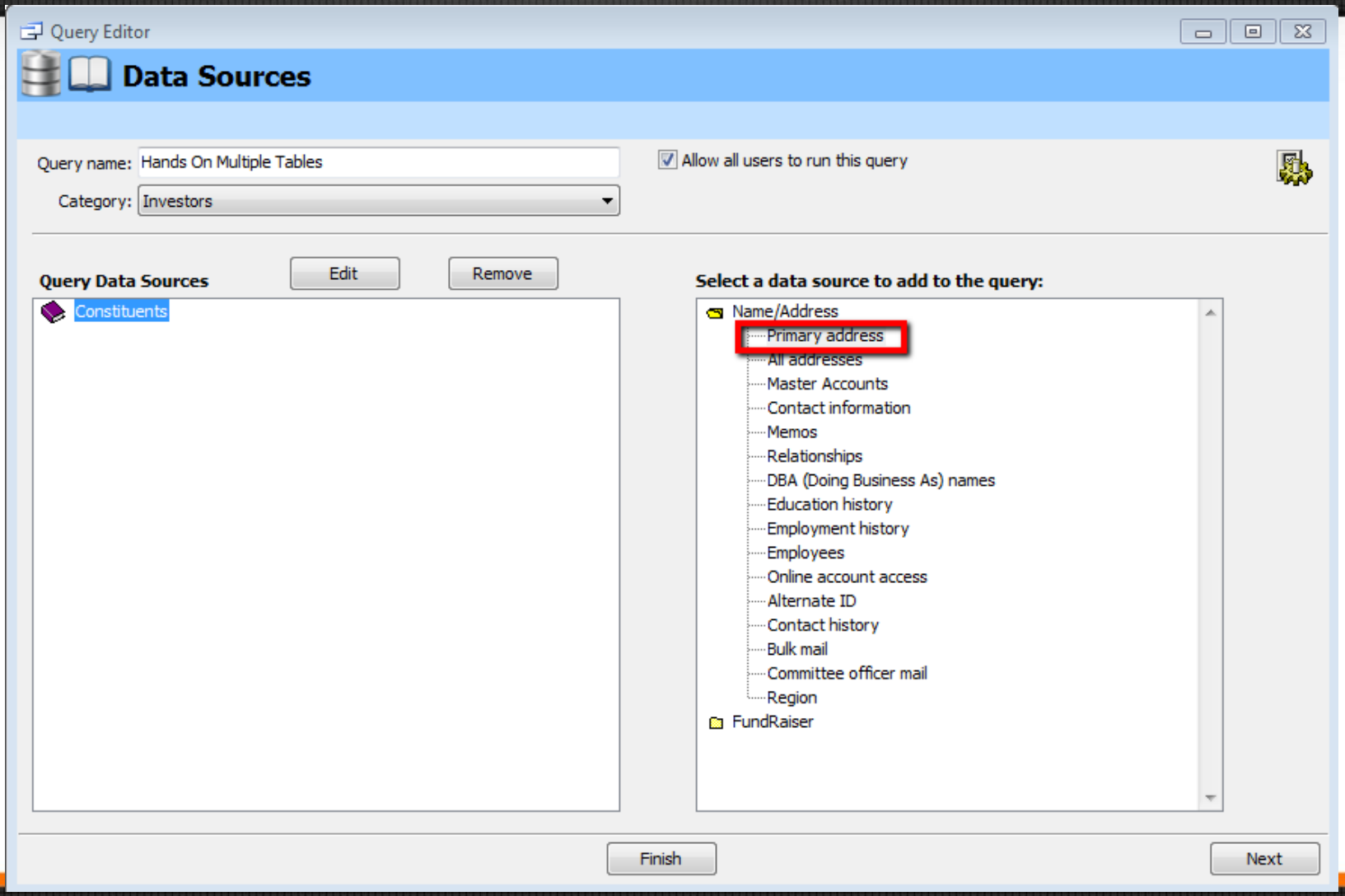
Sample Query
Single Table



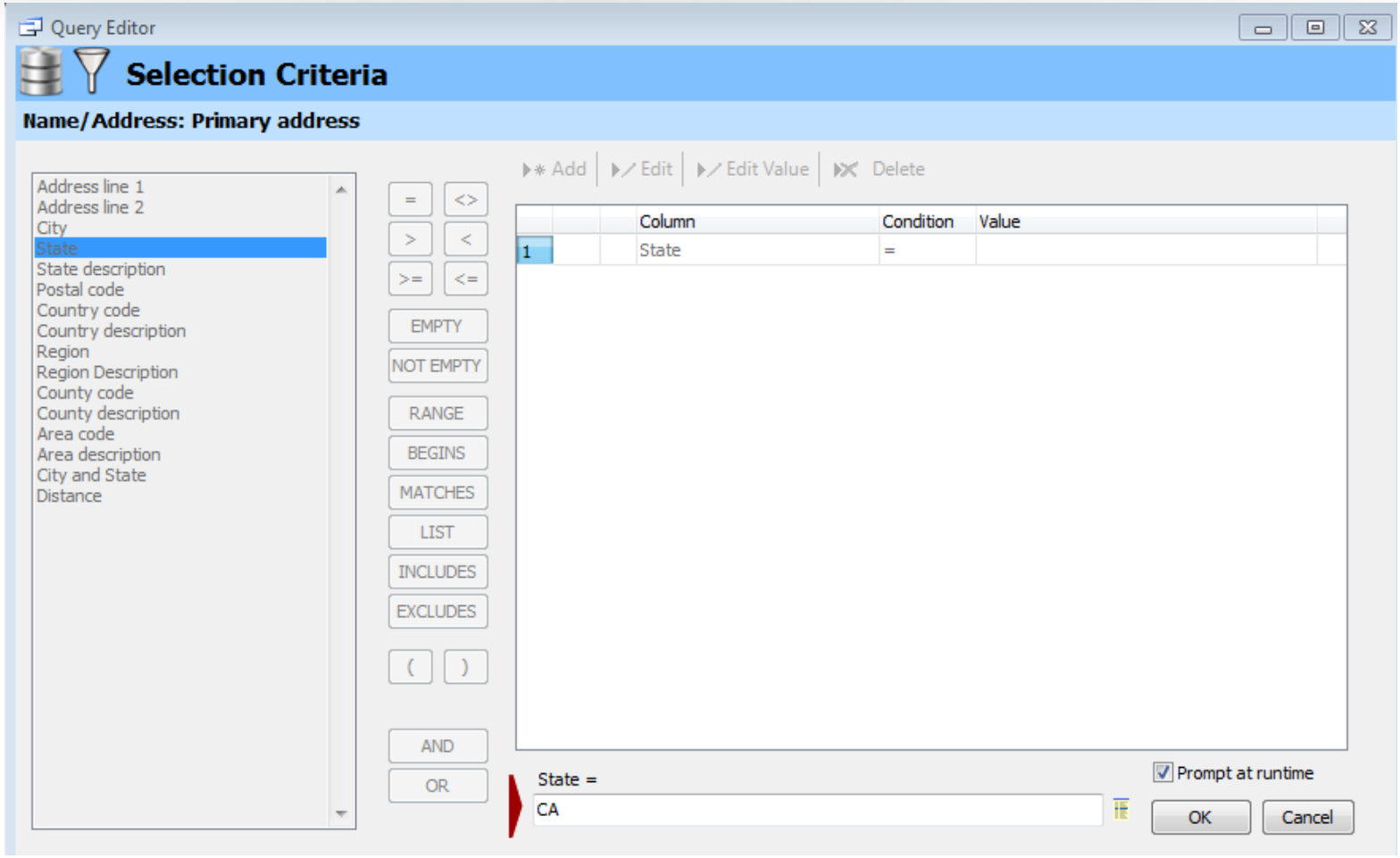
Sample Query
Single Table



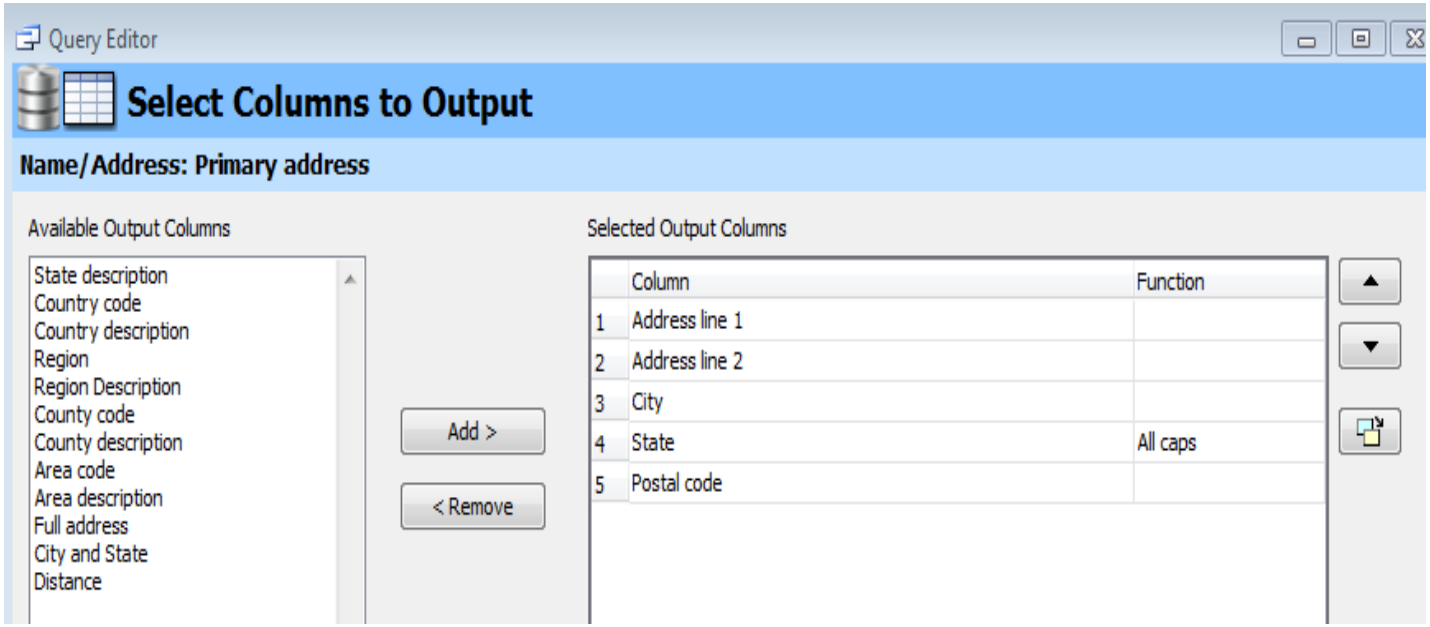
Sample Query Multiple Tables



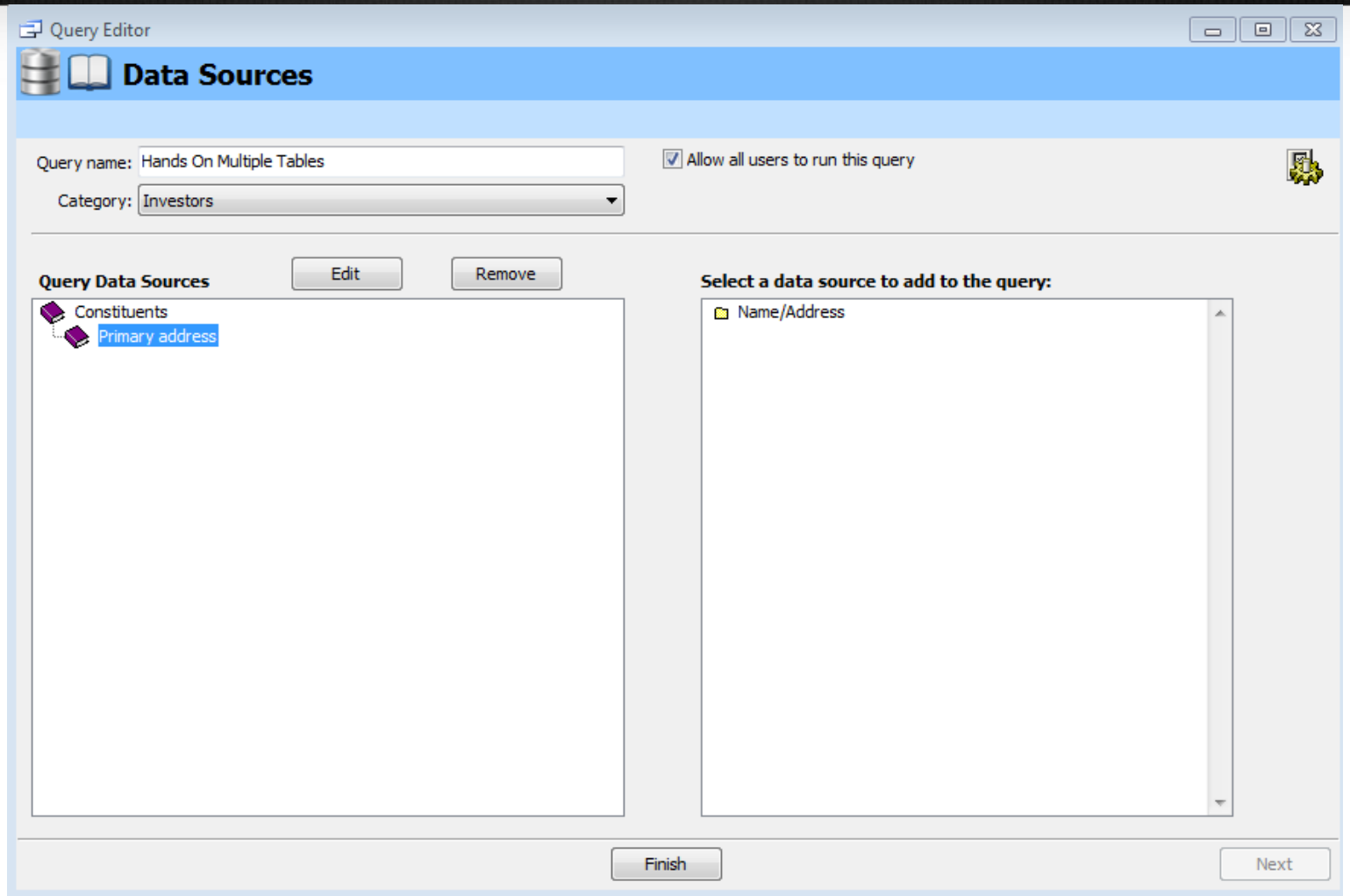
Sample Query Multiple Tables



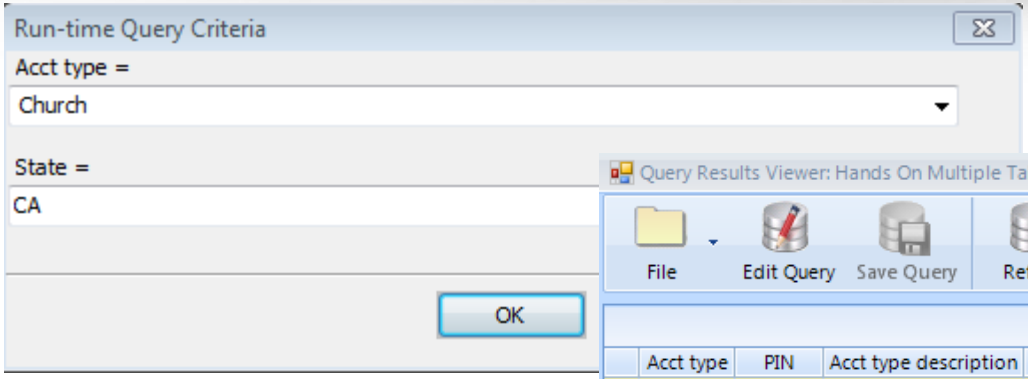
Sample Query Multiple Tables



Sample Query Multiple Tables



Sample Query
Multiple Tables



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/
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	fjleach91@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

Courtenay Brown

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support@ddi.org

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