



Utilize Your Data Extracts

2014 DDI User Group Meeting
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Serving those who serve others





Overview

- ❑ What is the Extract Module?
- ❑ Extract Module Basics
- ❑ Information Query
- ❑ Combined Information Query
- ❑ Types of Queries
- ❑ Mailings
- ❑ Extracts can be scheduled to run in Job Processing



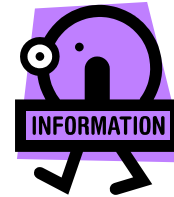
Extract Module

What is the Extract Module (Information Query) used for?





Information Query



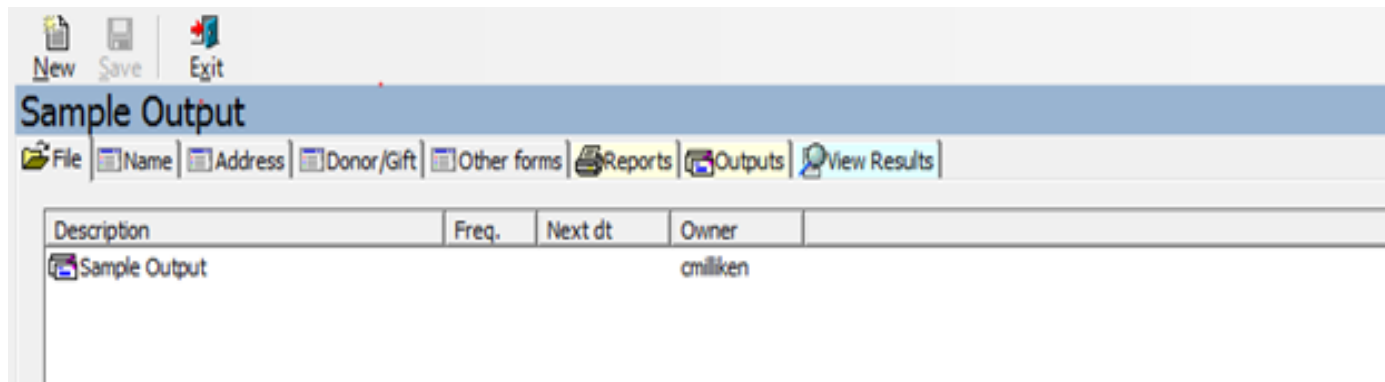
The Information Query module allows you to query, report on and extract information from a number of systems within DDI Connect.





Information Query Tabs

The File Tab is where saved queries and reports are stored and can be run from here.





Information Query Tabs

The Name Tab you can select to run by either Accounts or Constituents:

The screenshot shows the 'Sample Output' window with the 'Name' tab selected. The 'Select:' dropdown is set to 'Accounts'. The 'Include deleted' checkbox is unchecked. The 'Select constituents:' field is empty. Below it are four input fields for 'AI codes to include:', 'AI codes to exclude:', 'Denom. to include:', and 'Denom. to exclude:', each with a search icon on the right.

The screenshot shows the 'Sample Output' window with the 'Name' tab selected. The 'Select:' dropdown is set to 'Constituents'. The 'Include deleted' checkbox is unchecked. The 'Select constituents:' field is empty. Below it are four input fields for 'AI codes to include:', 'AI codes to exclude:', 'Denom. to include:', and 'Denom. to exclude:', each with a search icon on the right. Below these is an 'Address types:' field with a search icon. Underneath is an 'Account types:' field with a search icon. At the bottom, there are several checkboxes: 'Override default address type order?', 'Combine residents?', 'Include primary addresses only', 'Combine duplicate email addresses?', and 'Allow vacation address'. A 'Constituent email:' dropdown menu is set to 'No restrictions'.



Information Query Tabs

Donor/Gift Tab

Information Queries

File Name Address Donor/Gift Other forms Reports Outputs View Results

Donor Criteria

Include: Direct giving In-kind Non-gift Soft credit

Largest gift: 0.00 thru: 0.00 Use gift criteria for largest, first & total giving

Total giving: 0.00 thru: 0.00 Count: 0 thru: 0

First gift: 0.00 thru: 0.00 Date: thru: -

Recent gift: 0.00 thru: 0.00 Date: thru: -

Donor segment:

Gift Criteria

Include Exclude

Promo type: Exclude

Promo src: Exclude

Desig 1: Exclude

Desig 2: Exclude

Gift dates: thru: Calculate number of years given

Gift amount: 0.00 thru: 0.00 Output data based on gift criteria

Fund #: Exclude Fund type: Exclude Seed gifts only



Information Query Tabs

Other Forms Tab

- Individual Info
- Appeal History
- Event Participation
- Investment Info
- Loan Info
- Yearbook Info

The screenshot shows a web application interface for "Information Queries". At the top, there is a menu bar with "New", "Save", and "Exit" options. Below the menu bar, the title "Information Queries" is displayed. A navigation bar contains tabs for "File", "Name", "Address", "Donor/Gift", "Other forms", "Reports", "Outputs", and "View Results". A dropdown menu is set to "Criteria form: Individual Information". The main content area is titled "Individual Information" and contains several search filters:

- Include individuals with no personal information entered (all blank)
- Age range: [] thru: [] Blank ages: [No restrictions]
- Birth date range: [] thru: [] Search by month/day
- Death date range: [] thru: []
- Include earning codes: []
- Exclude earning codes: []
- Include education levels: []
- Exclude education levels: []
- Include professions: []
- Exclude professions: []
- Include schools: []
- Exclude schools: []



Information Query Tabs

Reports Tab

- AI Code Adjustment
- Alpha Directory Report
- Constituent Listing Report
- Donor Cluster Report
- Donor History Report
- Donor Name List Report
- Summary Donor Listing Report
- Yearly Giving Summary Report



Information Query Tabs

Outputs Tab

- Mailing Labels
- Mail Merge
- Data File
- Alternate Data (Tape) File
- Loan Data File
- Yearbook Data File



Information Query Tabs

View Results Tab

- ❑ View the results of query before generating report/extract.

Sample Output

File Name Address Donor/Gift Other forms Reports Outputs View Results

Sortable names Count: 3,548

Display gift information

Master ID	Name	City	ST
000000103	Silver Hill Bible Fellowship	Cleveland	OH
000000185	Redeemer Methodist Church	Troy	MI
000001379	Yellow River AMEZ Church	Bremerton	WA
000001502	Bright Creek Christian Church	Richmond	VA
000002095	First American Baptist Church	Evansville	IN
000002246	Holy Cross Mennonite Church	Kingman	KS
000002424	Mr Ben Small Ms Dianne Carr	Shawnee Mission	KS
000002442	Mr Ben Small Ms Amber M Sweet	Shawnee Mission	KS
000002460	New Covenant United Methodist Church	Helena	AL
000003001	Grace Missionary Church	Elwood	IN
000003681	Beatty Salvation Army	Hematite	MO
000003944	Mrs Lillian K Chambers Mr Ervin K Wolfe	Stillwater	OK
000004361	Mr Johnny Crosby Dr Denise P Dickson	Guthrie	OK
000004370	The Reverend John R Norris Mrs Shirley M Norris	Columbia	MO
000004400	Ms Barbara Baird	Warren	OH



Questions?



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