EXERCISES

Hands-On Training

Query Your Way to Better Ministry

ParishSOFT Intelligent Query Hands-On Class

Elaine Tank
ParishSOFT

Query Tags

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

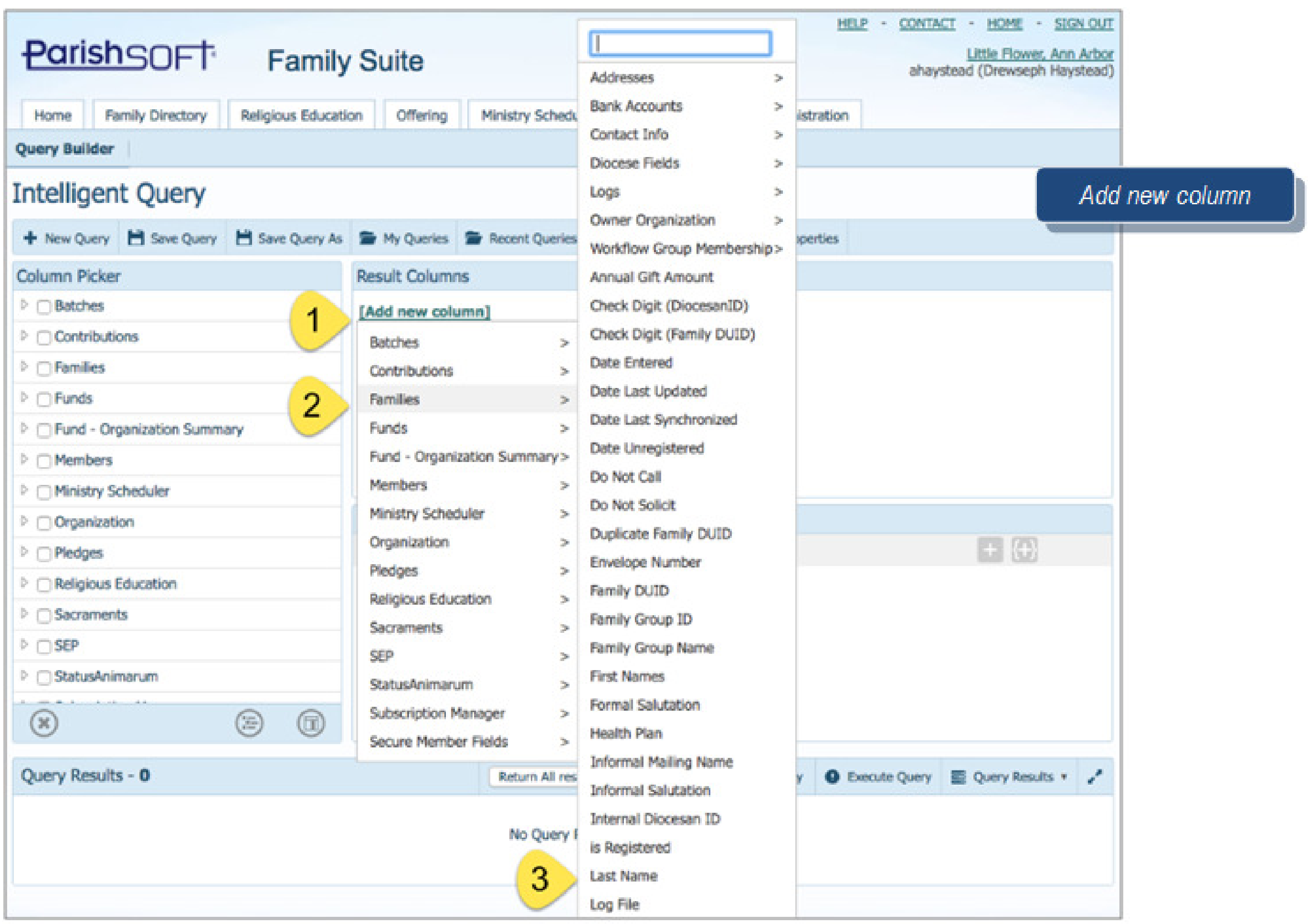
Exercise 1

1. Click on the **Query Tags** tab.
   - ∗ In the Window that opens click **Add Tag**
   - ∗ In the Tag Name Field Type **Families**
   - ∗ Click **Update**
   - ∗ Repeat the above three steps to add tags for
     - **I. Members**
     - **II. Contributions**
     - **III. Your Name**
   - ∗ Click **Close**

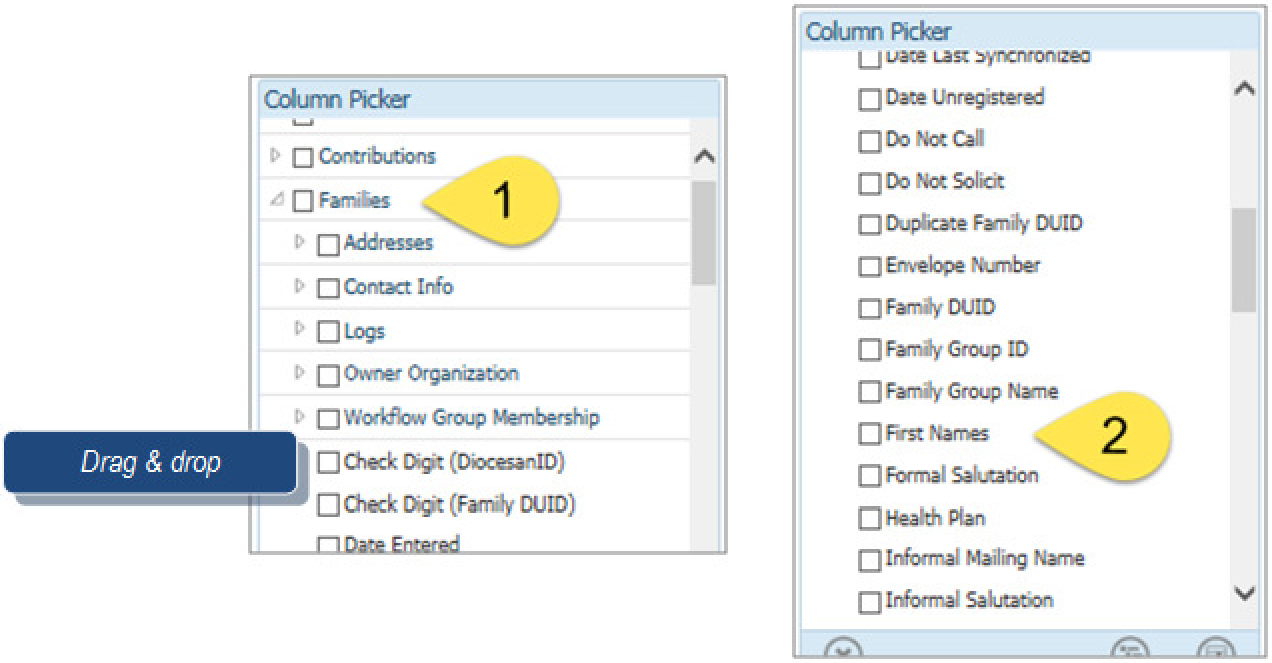
TIP: Adding columns and conditions

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

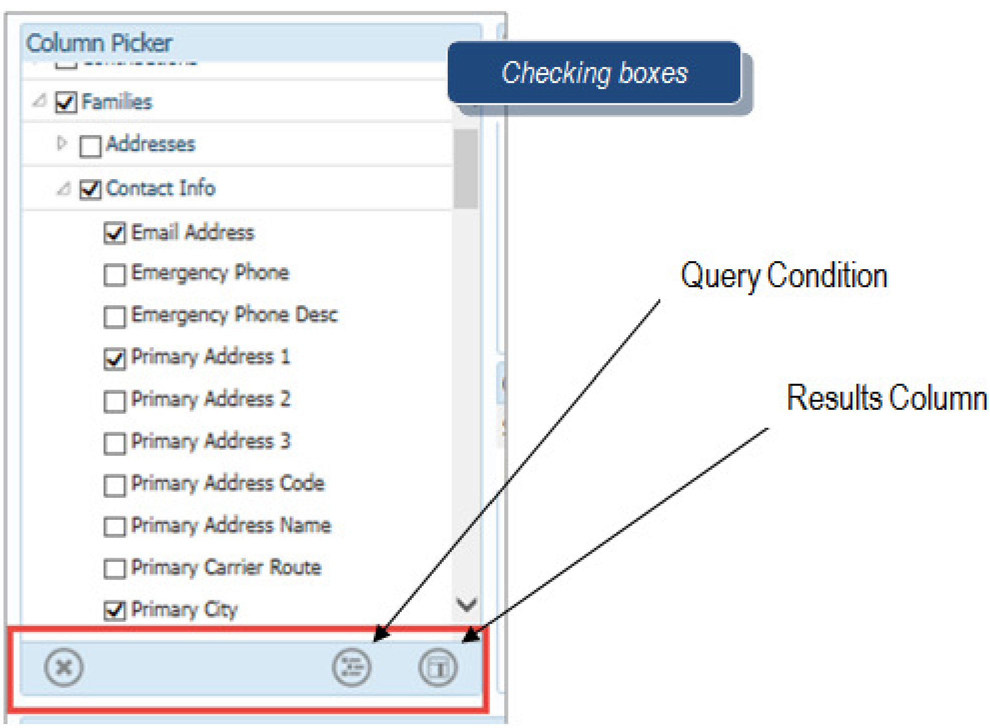
1. Add new column or add new condition (works the same for both)
   a. Click **Add New Column** link
   b. Click on **Families**
   c. Move cursor to the right and click **Last Name**



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 using Sorting & Ordering and Functions

The Finance committee wants to see a list of all of the funds and how much has been given to each of them.

Exercise 2

1. Add to **Results Columns,** using **Add new column link,** method 1 above.
   - **Add Funds, Description**
   - **Add Funds, Fund DUID**
   - **Add Contributions, Payment Amount**
     I. Click the ***f*** on the same column as the Contributions Payment Amount
     II. Select **Sum**
2. Click **Execute Query**

This gave you totals for all funds over all time. You know they will want just last year's totals.

3. Add to **Query Conditions.**
   - Click **Add New Condition**
     i. From the drop down select **Contributions, Payment Date**
        C. Leave the option of **"is between"**
        D. Click the first 00:00
        E. From the Calendar picker select **January 1st, 2017**
        F. Click the second 00:00
        G. From the Calendar picker select **December 31st, 2017**
4. Click **Execute Query.**

Father has met with the finance committee and they want to know who has given 1000.00 or more last year

i. Add to the **Results Columns**
   i. Add Families, First Names
   ii. Add Families, Last Names
      1. Move the Family First and Last Names to the top of the Results Columns
      2. Add a Sort to the Family Last name
         a. Click on the double arrows and choose **Ascending**
      3. **Add a sort to Sum of Contributions**
         a. Click on the double arrows beside Sum of Contributions and select **Descending**
   ii. Add to the **Query Conditions.**
   iii. Click the **Add new condition**
      1. From the drop down select **Contributions, Total Contributions**
      2. Change the "is equal to" to "**is greater than or equal to**"
      3. Type **1000** in the [enter value]
   iv. Click **Execute Query.**
   v. Select **Save Query As**
      Name = Over $1000 in 2016
      Tag = Contributions

***Select New Query

Creating a Workgroup from IQ query results

The Stewardship coordinator wants to start a seniors club and asked you for a list of members with contact information between the ages of 60 and 99

<u>Exercise 3</u>

a. Add To **Results Column** using the **Drag and Drop,** method 2 above**.**
   i. **Add Members, Member First Name (Formal)**
   ii. **Add Members, Member First Name (Informal/Nickname)**
   iii. **Add Members, Member Last Name**
   iv. **Add Member, Members Age**
   v. **Add Members, Contact Info, Email Address**
   vi. **Add Members, Contact Info, Home Phone**
   vii. **Add Members, Contact Info, Cell Phone**
   viii. **Add Members, Contact Info, Home Address 1**
   ix. **Add Members, Contact Info, Home Address 2**
   x. **Add Members, Contact Info, Home City**
   xi. **Add Members, Contact Info, Home State**
   xii. **Add Members, Contact Info, Home Zip**
   xiii. **Add Members, Member DUID**

******Query Results must include member DUID for Member Workgroups or Family DUID for Family Workgroups***

b. Add to **Query Conditions.**
   i. Add **Members, Members Age**
   ii. Change the "is equal to" to be "**is between**"
   iii. Type in **60** in the first [enter value]
   iv. Type in **99** in the second [enter value]
c. Click **Execute Query**.
d. Click **Query Results.**
e. Select **Create Member Work Group**
   i. Type in a **Senior Club** for your Workgroup Name
   ii. Click **Create**
f. Select **Save Query As**
   Name = Member Workgroup Creation
   Global = Checked
   Tag = Your Name
f. Select **Family Directory**
   i. Member Workgroups to view new Workgroup
b. Select **IQ**

***Select New Query

Grouping Conditions

You are reviewing sacramental information for members of your parish and you want to see who you have marked as Husband and Wife, but you don't have a Matrimony record entered for.

<u>Exercise 4</u>

a. Add To **Results Column** using the **checkbox method**, method 3 above**.**
    i. **Add Members, Members Full Name**
    ii. **Add Members, Member Type**
    iii. **Add Sacraments. Matrimony, Matrimony Completed**
b. Add to **Query conditions.**
    i. Click the **{+}** add group icon
        1. Change Batches Actual … to **Member, Member Type**
        2. Change set the "Starts with" to "**is equal to**"
        3. Type **Husband** in the [enter value]
    ii. Click the **+** add condition icon in the row with the "*<u>any</u>* of the following apply"
        1. From the drop down displayed select **Members, Member Type**
        2. Change set the "Starts with" to "**is equal to**"
        3. Type **Wife** in the [enter value]
    iii. Click the **{+}** add group icon
        1. Change Batches Actual … to **Sacraments, Matrimony, Matrimony Completed**
        2. Change the "is equal to" operator to **is null**
    iv. Click the **+** add condition icon in the row with the "*<u>any</u>* of the following apply"
        1. Change Batches Actual … to **Sacraments, Matrimony, Matrimony Completed**
        2. Enter the value of **0**
            a. *Note both of these conditions are needed to pull in records that were never marked as completed and those that may have previously been marked as completed but unchecked.*
c. Click **Execute Query.**
d. Select **Save Query As**
    Name = Incomplete Matrimony Record
    Tag = Members

***Select New Query

Query using Sub queries

You're planning a service in honor of parish members who have passed. You need to get a list of the active families and their contact information to send an invitation.

Exercise 5

a. Add to **Results Columns.**
   - **i. Add Families, Last Name**
   - **ii. Add Families, First Names**
   - **iii. Add Families, Contact Info, Primary Phone**
   - **iv. Add Families, Contact Info, Primary Address 1**
   - **v. Add Families, Contact Info, Primary Address 2**
   - **vi. Add Families, Contact Info, Primary City**
   - **vii. Add Families, Contact Info, Primary State**
   - **viii. Add Families, Contact Info, Primary Postal Code**

b. Shorten the Title Names as follows:
   - i. Families Last Name = Last Name
   - ii. Families First Names = First Names
   - iii. Families Contact Info Primary Phone = Phone
   - iv. Families Contact Info Primary Address 1 = Address 1
   - v. Families Contact Info Primary Address 2 = Address 2
   - vi. Families Contact Info Primary City = City
   - vii. Families Contact Info Primary State = State
   - viii. Families Contact Info Primary Postal Code = Zip

b. Add to **Query Conditions.**
   - i. Click the [Add new condition]
     1. Select Families, Family Group Name
     2. Type Active in the [enter value]
   - ii. Click the **[Add new condition]**
     1. From the drop down select **Members, Member DUID**
     2. Change the "is equal to" to "**in sub query**"
     3. Click **Edit Sub Query**
        - A. Click [**Add new condition]**
          - i. Add **Members, Member Status**
          - ii. Type **Deceased** in the [enter value]
          - iii. Click **Ok**

c. Click **Execute Query**.

d. Click on **Query Results** (on the right hand side of the Query Results panel)
   - **i.** Select **Mail Merge**
   - ii. Select **ParishSOFT Templates/Birthday Letter**
   - iii. Modify Merge Fields
   - iv. Modify Letter Content
   - v. Select Mail Merge | View Data
   - i. Select File | Save As | **All Saints Letter**
     1. Check Global
   - ii. Exit Mail Merge

***Select New Query and No to save query prompt

Query from Other ParishSOFT Modules

Religious Education

The Religious Education department is trying to get ahead of the game and wants to see which of the children in the Kindergarten, 1st and 2nd grades have a Baptismal record

Exercise 6

a. Add to **Results Columns.**
   i. **Add Members, Member First Name (Informal/Nickname)**
   ii. **Add Members, Member Last Name**
   iii. **Add Member, Members Age**
   iv. **Add Member, Members Birthdate**
   v. **Add Mother Name Text**
   vi. **Add Father Name Text**
   vii. **Add Members, Contact Info, Home Phone**
b. Add to **Query Conditions.**
   i. Click on the **{+}** in the row with the "*any* of the following apply"
      1. Click the "Batches Actual…" select **Religious Education, Grade Level**
      2. Type in **K** in [Enter Value]
   ii. Click the **+** in the row with the "*any* of the following apply"
      1. From the drop down select **Religious Education, Grade Level**
      2. Type in **1** in [Enter Value]
   iii. Click the **+** in the row with the "*any* of the following apply"
      1. From the drop down select Religious Education, Grade Level
      2. Type in **2** in [Enter Value]
   iv. Click the **[Add new condition]**
      1. From the drop down select **Sacraments, Baptism, Is Baptized**
      2. Type **1** in the [Enter Value]
e. Click **Execute Query.**

***Select New Query and No to save query prompt

Ministry Scheduler

Your Parish Engagement Leader wants a list of all register/active family members who have not yet volunteered for any Ministry

Exercise 6a

a. Add to **Results Columns.**
   i. **Add Members, Member Last Name**
   ii. **Add Members, Member First Name (Formal)**
   iii. **Add Members, Member First Name (Informal/Nickname)**
   iv. **Add Member, Members Age**
   v. **Add Members, Contact Info, Home Phone**
   vi. **Add Members, Contact Info, Home Address 1**
   vii. **Add Members, Contact Info, Home Address 2**
   viii. **Add Members, Contact Info, Home City**
   ix. **Add Members, Contact Info, Home State**
   x. **Add Members, Contact Info, Home Zip**

c. Add to **Query Conditions.**
   i. Click the **[Add new condition]**
      1. Select **Families, Is Registered**
      2. Click **[select value]**
      3. Select **Yes**
   ii. Click the **[Add new condition]**
      1. Select **Families, Family Group Name**
      2. Change "starts with" operator to **"is equal to"**
      3. Click **[select value]**
      4. Type **Active**
   iii. Click the **[Add new condition]**
      1. Select **Members, Member DUID**
      2. Change the "is equal to" operator to **not in sub query**
      3. Click **[edit sub-query]**
         C. Click **[Add new condition]**
            i. Select **Ministry Scheduler, MinisterDUID**
            ii. Change "is equal to" operator to **is not null**
            iii. Click **OK**

f. Click **Execute Query.**

***Select New Query and No to save query prompt

Aggregate Functions

To find a count by age of all those in your parish.

Exercise 7

- ***Persons by Age***
  - Using either the Column Picker or Add new column in the **Result Columns** panel select the following results columns:
    1. **Members/Age**
       - Hover you mouse to the left of the Members/Age Expression and click on the double arrows to select the Ascending sort order.
    2. **Members/Gender**
       - If you don't want a breakdown by Gender you can disable this column
    3. **Members/Member DUID**
       - On the Member DUID row in the Results Column click on the **function button "*f*" and select "Count"**
  - Using either the Column Picker or Add new condition link in the **Query Conditions** panel select:
    1. **Member/Age**
       - Set the **Operator to "is between"**
       - Set the **Value to 0 and 109**
    2. **Organization/Organization Name**
       - Set the Value to <<Insert Name of Parish your logged into>>
         - Parish Name is listed under Help, Contact, Home, Sign Out links in upper right hand corner of your screen.
  - Click **Execute Query**

***Select Save Query. Name = Persons by Age; Tag = Members

Exercise 7a

- ***Average Age of Adults***
  1. Modify the above existing query by removing the following from the Results Columns
     - **Members/Gender**
     - **Members/Member DUID**
  2. On the **Member/Age** row click on the function button "f" and select Average
  3. Modify the query conditions as follows:
     - **Members Age is greater than or equal to 18**
       - *Note: If you wanted to find the average age of all of the children set your conditions to Members Age is less than or equal to 17*
  4. Click **Execute Query**

***Select Save Query. Name = Average Age; Tag = Members

Additional Aggregate Function query ideas

- *Sacraments Count By Parish By Year*
- *Minimum/Maximum Pledge*
- *Count of Families by Family Group*

Additional Exercises

For use with your own data

Total Contributions

List of families whose total giving to all funds is $250 or more.

1. In the Column Picker panel, select the following columns:
   - **Families/Last Name**
   - **Families/First Names**
   - **Families/Mailing Name**
   - **Families/Contact Info Primary Address 1**
   - **Families/Contact Info Primary Address 2**
   - **Families/Contact Info Primary State**
   - **Families/Contact Info Primary Zip Plus**
   - **Contributions/Payment Amount**
     - Because you want the sum total of the donor's payment, apply the aggregate **SUM** function to this column
2. In the Query Conditions panel, select **Contributions/Total Contributions**; remember this column may only be used in your Query Conditions.
   - As you only want to view those donors whose total contributions are $250 or more apply the following:
     - Operator "**is greater than or equal to**"
     - Value "**250**"
3. Click **Execute Query**

Additional Considerations

- *To view the total for a specific fund, add a query condition of*

  Funds **Fund DUID** **is equal to** ***<<Insert Fund DUID of desired fund>>***

  Or you could search by Fund Description, "Capital Campaign"
- *To view total contributions given during a date range, add a query condition of*

  Contributions **Payment Date** **is between** ***Date and Date***

Using the results of a Query in Another Query

Which Families pledged more than the average amount to a fund.

- ***1st Query – Average Pledge to the last pledge campaign***
  1. From the Column Picker panel, select the following results columns
     - **Funds/Description**
     - **Pledges/Total Pledge Amount**
       - Apply the **"Average" aggregate function** to the Total Pledge Amount column.
         - Click on the **function button "*f*"** to the right of this column **and select "Average"**
  2. In the Query Conditions panel, add the following conditions:
     - **Funds Fund DUID** **is equal to** ***<<Insert Fund DUID for prior pledge fund>>***
  3. Click **Execute Query,** and note the result
- **2nd Query – Families who Gave More Than the Average**
  1. Select New Query. From the Column Picket panel, select the following columns:
     - **Families/Family DUID**
     - **Families/Last Name**
     - **Families/First Names**
     - **Pledges /Total Pledge Amount**
  2. From the Query Conditions panel specify the following conditions:
     - **Funds Fund DUID** **is equal to** ***<<Insert Fund DUID for current year pledge fund>>***
     - **Pledges Total Pledge Amount** **is greater than** **###.##**

       (Hint: Enter the results of your 1st query)
  3. Click **Execute Query**

Families who pledged last year, but unfortunately not this year, LYBUNT

1. In the Column Picker panel, select the following results columns:
   - **Pledges/Total Pledge Amount**
   - **Pledges/Family DUID**
   - **Families/Last Name**
   - **Families/First Names**
   - **Families/Mailing Name**
   - **Families/Contact Info Primary Address 1**
   - **Families/Contact Info Primary Address 2**
   - **Families/Contact Info Primary State**
   - **Families/Contact Info Primary Zip Plus**
   - **Pledges/OBO Organization/Organization ID**
   - **Pledges/OBO Organization/Organization Name**

2. In the Query Conditions panel specify the following conditions

   Pledges Total Pledge Amount **is greater than** **0.00**

   and **Funds Fund DUID** **is equal to** ***<<Insert this year pledge fund DUID>>***

   - Plus the following Sub-Query
     - Click on the Add new condition link, select **Pledges/Family DUID**
       - Select the Operator of **"not in sub query"**
       - Click "**edit sub-query**"
         - Click "**Add new condition**"
           - Select column **Pledges/Fund DUID**
           - Select Operator of "**is equal to**"
           - Select Value of ***<<Insert last year's pledge fund DUID>>***
           - Click **OK**

3. Click **Execute Query**
   - Click on Query Results and select Export to CSV

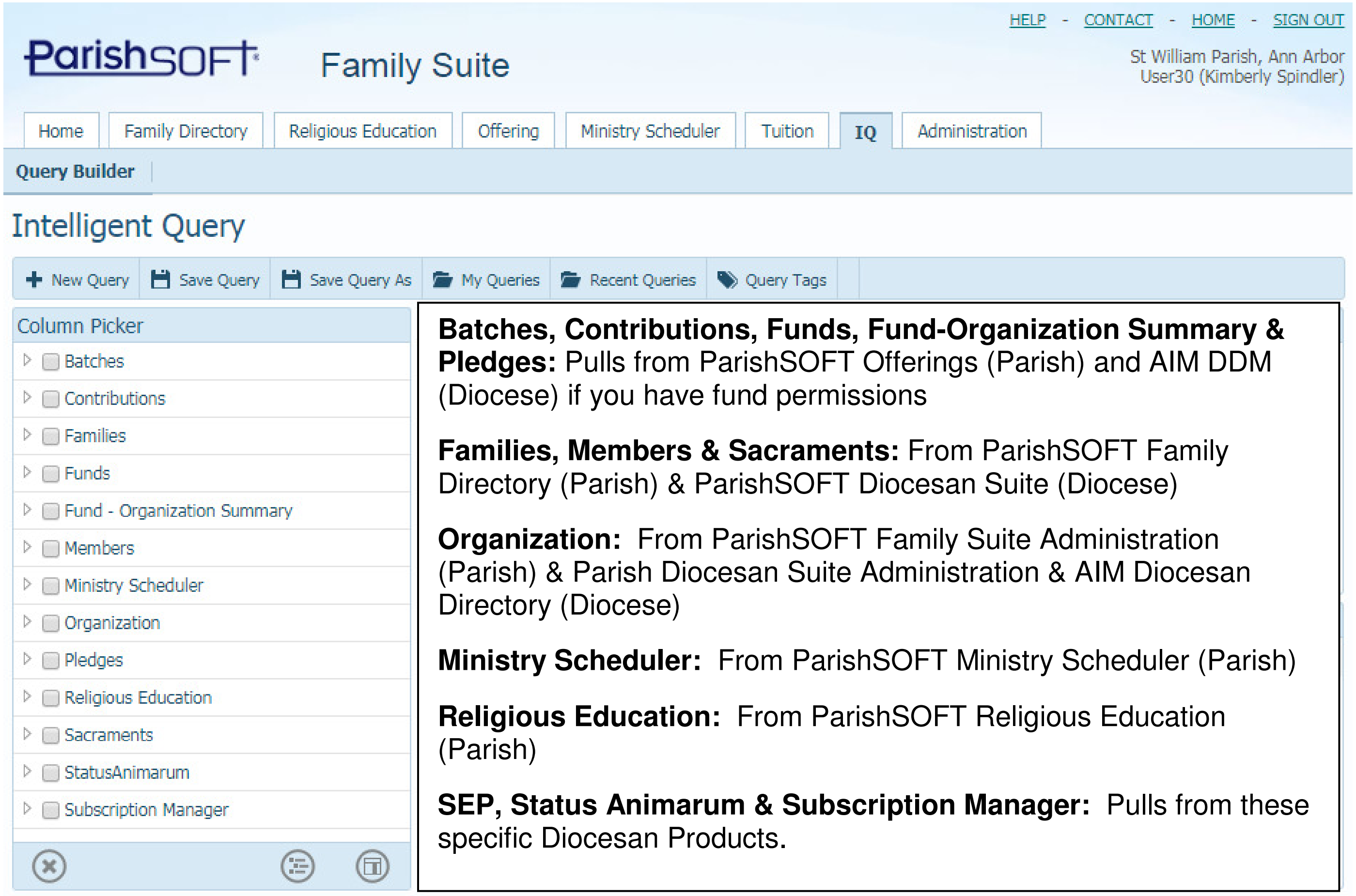
Tips

Suggestions for Designing

1) Decide exactly what you want to know. Ask yourself what information you need to obtain from your database. Then determine where that information resides in your database.
   - Which groups or database entities contain the data you are looking for?
   - Which specific columns hold the data you need?
   - What level of detail do you need?
   - Do you need to limit the results based on specific values?
2) If you are setting up a condition on a column and you need to know the column's exact values, add the column to the query results and then run the query to see the values in the column. This is particularly helpful when you are not sure of the spelling or formatting of a value.
3) It helps to follow a specific sequence of steps. We recommend that you add elements to your query one at a time and run the query after each addition or modification. Review the results to make sure that the results you obtain match your expectations.
4) If you query contains multiple conditions use the "toggle enable" button. By dealt when you add a new condition to a query it is enabled. You can use disable query conditions to verify that each condition is producing the desired results. Add the first condition, run the query review and verify; add the 2nd condition and disable the first condition, run the query review and verify, do this for all conditions. Then enable the 1st two conditions, run and review; enable the 3rd run and review; etc.
5) Why save often and Always? For security reasons ParishSOFT times out after 30 minutes of inactivity. To prevent loss of your work, save queries while you are working on them as when the system times out you will lose any unsaved work. It is a good idea to get in the habit of saving your queries – even those you consider experimental – because you never know whether a query you create today might end up providing the information you need later. Remember to give the query a useful description so you remember its purpose.
6) Creating base queries and saving them as a basis for new queries is a strategy that can save you lots of time and effort. A basic family mailing query is a good example of this.

Trouble Shooting Queries

1) Just above the Query Results panel, the application displays the number of records found. If the number is much larger or smaller than anticipated, that is one sign that you need to check your query design.
2) Look through the results, if you find duplicates; select the Unique Records Only checkbox to ensure that only unique records are returned.
3) Some columns have similar names so is quite possible that you selected the wrong column. Make sure you have selected all of the columns you need and that the columns you selected are the ones you intended to select.
4) Keywords all access by clicking the "all" link in the "Select records where" statement at the top of the Query Conditions panel. The keyword restricts or limits the records the query retrieves.
5) To check your conditions verify that the columns you want conditions applied to actually have the desired conditions applied and that the conditions are correctly formulated. Verify the spelling of any variables in your conditions.



Batches, Contributions, Funds, Fund-Organization Summary & Pledges: Pulls from ParishSOFT Offerings (Parish) and AIM DDM (Diocese) if you have fund permissions

Families, Members & Sacraments: From ParishSOFT Family Directory (Parish) & ParishSOFT Diocesan Suite (Diocese)

Organization: From ParishSOFT Family Suite Administration (Parish) & Parish Diocesan Suite Administration & AIM Diocesan Directory (Diocese)

Ministry Scheduler: From ParishSOFT Ministry Scheduler (Parish)

Religious Education: From ParishSOFT Religious Education (Parish)

SEP, Status Animarum & Subscription Manager: Pulls from these specific Diocesan Products.

Helpful Video Links

Full Length Training Video

- **ParishSOFT IQ: Basics** https://vimeopro.com/parishsoft/cn-iq

Short Help Videos

- **IQ Overview** http://help.parishsoft.com/video/help/iq/overview.htm
- **IQ: Adding Fields and Sorting** http://help.parishsoft.com/video/help/iq/adding-fields-and-sorting.htm
- **IQ: Exporting & Merging** http://help.parishsoft.com/video/help/iq/exporting-and-merging.htm
- **IQ: Adding Conditions - Basic** http://help.parishsoft.com/video/help/iq/adding-conditions.htm
- **IQ: Adding Conditions - Advanced** http://help.parishsoft.com/video/help/iq/adding-conditions-advanced.htm