

## Menu options

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

## Query Tags

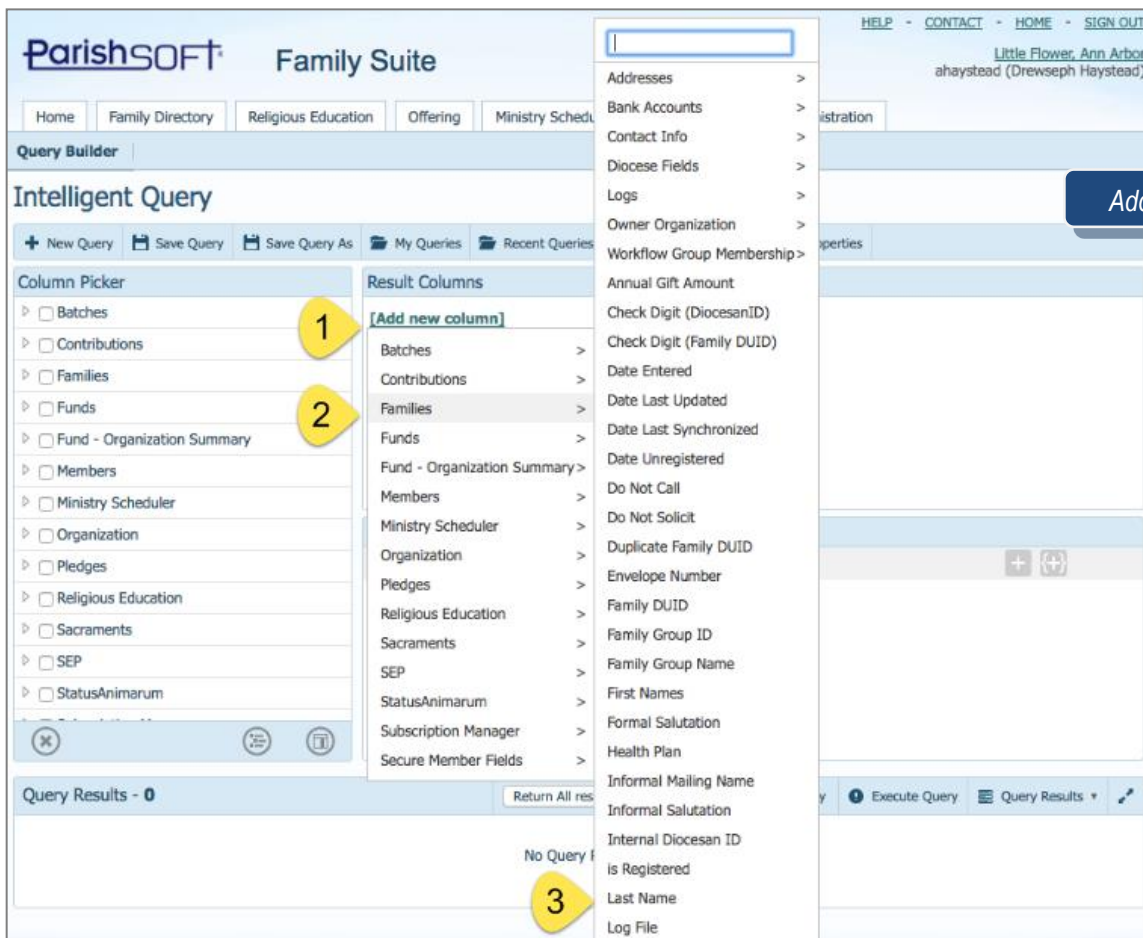
*Use Query Tags to assign keywords to saved queries, making categorizing them easier such as Families, Members, Contributions, etc.*

- Create a tag with your name

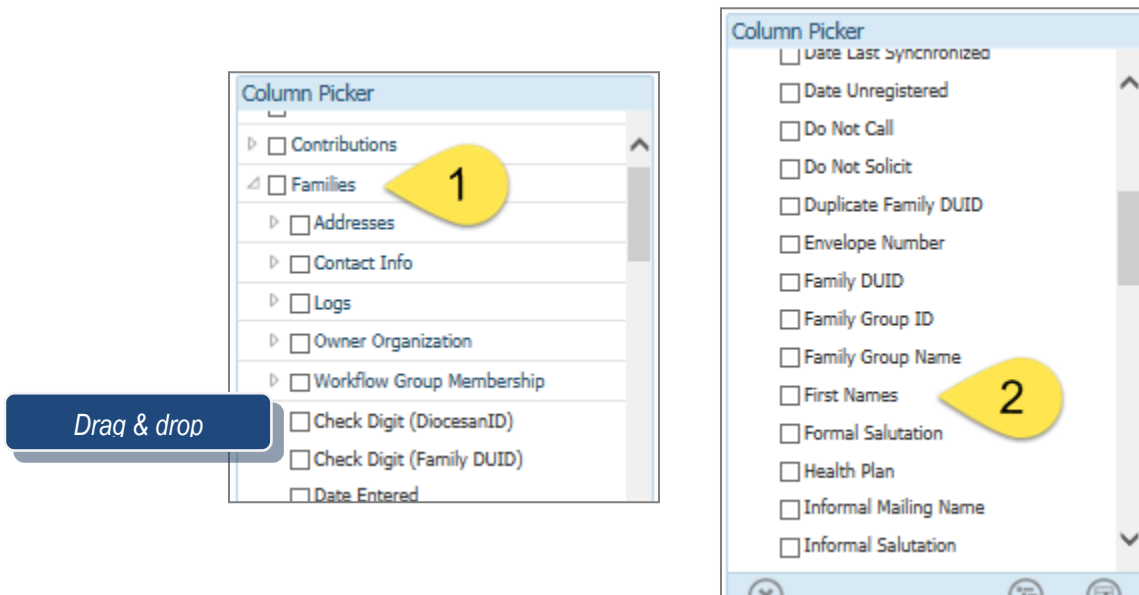
## Adding columns and conditions

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

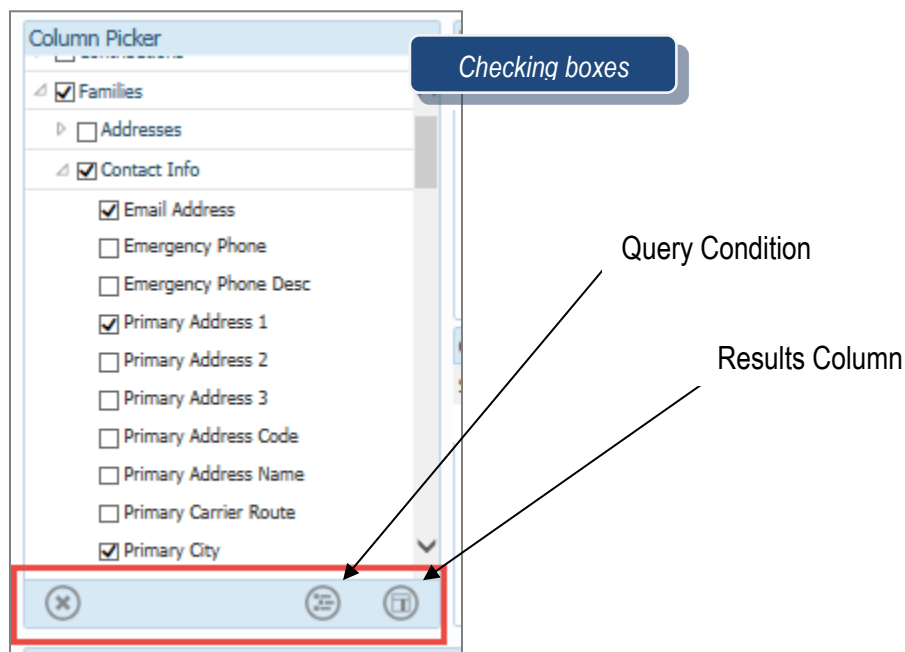
1. Add new column or add new condition (works the same for both)
  - a. Click **Add New Column** link
  - b. Click on **Families**
  - c. Move cursor to the right and click **Last Name**



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. Sacraments>Confirmation>Is Confirmed
    - i. Is Null
- 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*