

# IQ Queries

**Instructions.**

The screenshot shows the ParishSOFT Diocesan Suite interface. At the top, there are navigation links: HELP, CONTACT, HOME, SIGN OUT. Below that, the user is identified as 'Diocese of San Bernardino, San Bernardino' and 'ekuske (Eric Kuske)'. The main menu includes Home, Census, Diocesan Development, IQ, and Administration. The 'Query Builder' section is active, showing 'Intelligent Query' with options for New Query, Save Query, Save Query As, My Queries, Recent Queries, Query Tags, and Model Properties. The 'My Queries' button is circled in blue, with callout 1 pointing to it. The 'Query Conditions' section is also circled in blue, with callout 2 pointing to it. Below this, there are three conditions listed, each with a radio button. Callout 3 points to the first radio button (which is selected), and callout 4 points to the second radio button (which is unselected).

Use My Queries (number 1 above) to search for the query you are interested in using. On page 2 from the below list. When opening the query, you will be able to adjust the conditions of the query to meet your needs under Query Conditions (number 2 above). You can enable or disable conditions as shown in numbers 3 and 4 above.

When using “My Queries” The following screen comes up:

The 'My Queries' window displays a table with the following data:

Query Name	Query Tags	Date Created	Date Modified	Owner	Global
<a href="#">Edit</a> <a href="#">Delete</a> Dio DDF Listing Donations	Custom Queries	7/24/2019	7/24/2019	Kuske, Eric	<input checked="" type="checkbox"/>
<a href="#">Edit</a> <a href="#">Delete</a> Dio SA Confirmation		6/26/2020	6/29/2020	Kuske, Eric	<input checked="" type="checkbox"/>
<a href="#">Edit</a> <a href="#">Delete</a> Dio SA Reconciliation		6/29/2020	6/29/2020	Kuske, Eric	<input checked="" type="checkbox"/>

Use the box “Query name” to type in the name of the query or part of the name, then click on apply to limit the list.

At the bottom of that window it will show pages which you can click on to see what queries are on each page.

The pagination control shows 'Page 1 of 18 (175 items)' with navigation arrows and page numbers 1, 2, 3, 4, 5, 6, 7, ..., 16, 17, 18.

## List of Queries Created for Parish Use:

### Dio DDF Listing Donations:

This is used by the parish office's that post the entries directly to one of their funds to list the entries made for DDF, FCC or SCC so that the Development Office has a listing of the entries. Use the conditions to adjust what the date range is and what fund to limited it to.

### Dio SA Confirmation

Lists the confirmations for the parish between a certain date range that are marked completed. Make sure to check of the box for Unique Records Only.

Includes the birthdate so that after data is exported to csv file a calculation can be done to determine age of person at the time of confirmation.

### Dio SA Reconciliation

Lists the Reconciliations that are completed for the parish between a certain date range. Make sure to check of the box for Unique Records Only. Be sure to set the Parish ID to your parish ID and the date range to what is being looked for.

### Dio SA Catechumens/Candidates

Lists the Baptism, First Eucharist, Confirmation and RCIA fields so that the number of Catechumens and candidates can be found. Make sure to check of the box for Unique Records Only. Be sure to set the Parish ID for Eucharist and Confirmation to your parish ID and the date range to what is being looked for.

### Dio SA Death Count

List the number of records where the Date of Death is between the indicated date range, and the Death record indicates the parish represented by the Parish ID. Make sure to check of the box for Unique Records Only.

### Dio BYTE Mailing List



Lists all the families that gave to one of the tax-deductible funds between the indicated date range.

Use the conditions to adjust the date range. More conditions can be added if needed.

## Dio Env Check

Allows for listing of families that are set to received envelopes based on the “send contribution envelopes” check box. By using the various conditions families can be found that haven’t given to a fund by a date range or have given to that fund in a date range.

To list families that have given to a fund during a date range the following parameters would need to be set or made active using 3 or 4 in the above instructions:

1. [Families Send Contribution Envelopes](#) is equal to [Yes](#)
2. and [Families Family DUID](#) in sub query [\[edit sub-query\]](#)  
  - a. In the edit sub-query



Select records where **all** of the following apply

[Contributions Payment Date](#) is greater than or equal to [Jan 01 2021](#)

and [Contributions Fund ID](#) is equal to [10582](#)

    - i.
    - ii. Change to what is needed for the date range and fund ID. If a parameter is not needed it can be removed or the circle unmarked as in 3 or 4 in the above instructions.

To list families that have not given to a fund during a date range the following parameters would need to be set or made active using 3 or 4 in the above instructions:

1. [Families Send Contribution Envelopes](#) is equal to [Yes](#)
2. and [Families Family DUID](#) not in sub query [\[edit sub-query\]](#)  
  - a. In the edit sub-query

Select records where **all** of the following apply

[Contributions Payment Date](#) is greater than or equal to [Jan 01 2021](#)

and [Contributions Fund ID](#) is equal to [10582](#)

    - i.
    - ii. Change to what is needed for the date range and fund ID. If a parameter is not needed it can be removed or the circle unmarked as in 3 or 4 in the above instructions.

### **Dio sum Tax deductible**

Will list all the families that gave to one of the funds marked as tax deductible for the given date range. However, you will need to use excel to limit the list to those that gave a total amount in the ranges needed. So for instance if you wanted to break the list up as follows:

- Those that gave less than \$100
- Those that gave \$100 or more and less than \$1000
- Those that gave \$1000 or more

You would need to filter the “sum of Contributions Payment Amount“ by those conditions.