Query Your Way to Better Ministry
ParishSOFT Intelligent Query (Hands-On)

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Today’s Agenda

• ParishSOFT IQ User Interface
  – Column Picker, Results Column & Query Conditions
  – Query Tags
  – Working with Query Results
• Designing & Trouble Shooting Queries
• Hands-on Exercises
The Column Picker is your starting point for designing a query.

The Results Columns panel lists all of the columns you select for your query. These are the columns that will appear in your results after you run a query. "What data"

The Query Conditions panel is where you can limit the results of your query. The results of your query will only include the data that satisfies the conditions you specify. "Which data"
<table>
<thead>
<tr>
<th>Column Picker</th>
<th>Result Columns</th>
<th>Query Conditions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Members</td>
<td>Expression</td>
<td>Members Age</td>
</tr>
<tr>
<td></td>
<td>Members Gender</td>
<td>Age</td>
</tr>
<tr>
<td></td>
<td>Count</td>
<td>Gender</td>
</tr>
<tr>
<td>Members Age</td>
<td>Number of Members</td>
<td>Keywords = All, Any, None, Not All</td>
</tr>
<tr>
<td>is between</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0 and 109</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Query Results - 232

<table>
<thead>
<tr>
<th>Age</th>
<th>Gender</th>
<th>Number of Members</th>
</tr>
</thead>
<tbody>
<tr>
<td>109</td>
<td>F</td>
<td></td>
</tr>
<tr>
<td>107</td>
<td>F</td>
<td></td>
</tr>
</tbody>
</table>
ParishSOFT IQ User Interface: Query Results

<table>
<thead>
<tr>
<th>Age</th>
<th>Gender</th>
</tr>
</thead>
<tbody>
<tr>
<td>109</td>
<td>F</td>
</tr>
<tr>
<td>107</td>
<td>F</td>
</tr>
<tr>
<td>107</td>
<td>M</td>
</tr>
<tr>
<td>106</td>
<td>F</td>
</tr>
<tr>
<td>106</td>
<td>M</td>
</tr>
<tr>
<td>105</td>
<td>F</td>
</tr>
<tr>
<td>105</td>
<td>M</td>
</tr>
<tr>
<td>104</td>
<td>F</td>
</tr>
<tr>
<td>104</td>
<td>M</td>
</tr>
<tr>
<td>103</td>
<td>F</td>
</tr>
<tr>
<td>103</td>
<td>M</td>
</tr>
</tbody>
</table>
ParishSOFT IQ User Interface: Query Tags

Tags are labels that you define and assign to help you organize your query library.
Designing Your Query: Behind the scenes
Designing Your Query: DUIDs

• The DUID (Diocesan/Data Unique ID) is your friend.

• Every type of record has a DUID.
  – Family DUID, Member DUID are commonly used.
  – Contribution DUID, Fund DUID, Minister DUID, etc.

• DUID is used to identify records in each table.
  – DUID keeps records unique.
  – DUID is also used to link tables together.
Designing Your Query

**What Are You Looking For?**

- People who give (Contributions)
- Students/Teachers (Religious Education)
- Registered Families (Families)
- Baptized People (Sacraments)
- Families with Children (Members)
- People who Serve, or Don’t Serve (Ministry Scheduler)
Suggestions for Designing

1. Plan your query
2. Add a column to a Query to find the correct values in a column
3. Add query elements one at a time
4. Check the integrity of the results if the query contains multiple conditions
5. Save Often and ALWAYS
6. Re-Use and Modify
Trouble Shooting Queries

_Not getting the expected results?_

1. Did you get the right number records?
2. Are there duplicates in your results?
3. Did you select the right columns?
   • Are you missing columns?
4. Did you select the right keyword?
   • All, Any, None, Not All
5. Did you apply all the desired conditions?
   • Are they specified and spelled correctly?
Hands-On Exercises
Exercise 1: Query Tags

- Create a “Families” tag
- Create a “Members” tag
- Create a “Contributions” tag
- Create a tag with your name
Exercise 2: Sorting and Functions

• Sorting  
  – Not Sort, Ascending, Descending  
  – Move to First, Previous, Next, Last

• Functions (Aggregate Column)  
  – Sum, Count, Average, Minimum, Maximum
Exercise 3: Creating a Workgroup from IQ
Exercise 4: Grouping Conditions

- The **And** Operator
- The **Or** Operator
- Using **And** and **Or**
  - Setting up grouped conditions
Exercise 5: Sub Queries

• What is a Sub Query?
• How ParishSOFT IQ Processes Sub queries
• When to use a Sub Query
  – When you want to know if certain records exist
  – When you don’t have enough information
  – When you want to exclude a set of records
• Constructing a Sub Query
Exercise 6: Query from Other ParishSOFT Modules

• Religious Education
  – Grouping Conditions

• Ministry Scheduler
  – Sub Queries
Exercise 7: Aggregate Functions

- **Sum** – Adds all of the values in a column together and returns the sum of the numeric values.

- **Count** – Counts the number of values in a column that meet the specified condition and returns a single integer value that represents the total number counted.

- **Average** – Averages the values in a column and returns the average value.

- **Minimum** – Finds the lowest (smallest) value in a column.

- **Maximum** – Returns the highest value in a column.
QUESTIONS?
Thank you!

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