

Getting Started with Query



Query. A question. A search for knowledge. A powerful and helpful tool available in ***The Raiser's Edge!***

Odds are your ***Raiser's Edge*** database is pretty large, full of donor, membership, and gift information. Odds also are that you often need to extract bits of this information for mailings, reports, and many other functions throughout the program. This is where *Query* comes in. Manually sifting through all of your records like a miner digging for gold is not the most efficient way to gather the data you require. Rather, you can use *Query* to strategically filter and group records to get exactly what you need, making that gold you seek not so hard to find.

So you don't feel as if you've been dropped into a dark mine with nothing to guide your mission, check out this tutorial to help you get started. Answering four main questions, we'll break *Query* down into manageable nuggets of information:

1.) *What type of records or information are you looking for?*

2.) *What specific criteria do you have?*

3.) *What do you want to see in the output?*

4.) *How do you want your results displayed?*

As we dig into the details of how to build a query, we'll follow an example to help us along the way. So grab a lantern and let's put some light on the subject!

Getting Started

Before we begin, let's talk a bit more on the basics of what *Query* is, as well as introduce the example query we'll follow throughout this tutorial.

As stated earlier, *Query* is a powerful tool in ***The Raiser's Edge*** that allows you to filter and group records. *Query* basically uses all the fields on all the different types of records to gather its information. So, if you know what you're searching for, it's just a matter of selecting the type of record you want to see, and then refining your search with criteria to narrow down your results.

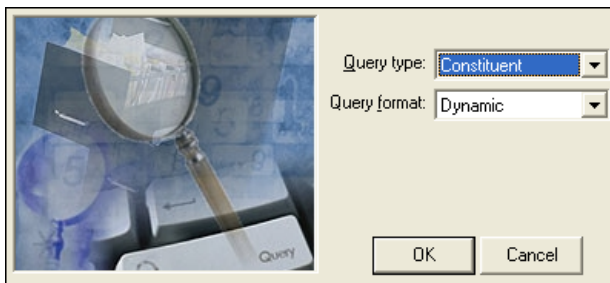
Before you even begin to build your query, you need to think about what records you want to see. So let's introduce our example query. Let's pretend you're about to start a phone campaign to solicit donations for your annual fund. To get started on your effort, the question you'll pose to *The Raiser's Edge* using *Query* is:

Who are my individual constituents who gave to last year's annual fund, with a home phone number?

What Type of Records or Information are You Looking For?

The first question to consider when building a query should be, "What type of records, or information are you looking for?" Answering this question will determine the query type and format to select when you create a new query in *The Raiser's Edge*.

To create a new query, access the *Query* module, and click **New Query**. The New Query screen appears.



Now let's talk a bit about those query types and formats.

Query Types

Choosing the right query type is the first step in getting the answers you want from your database. This determines what type of records you're looking for by literally telling *The Raiser's Edge* to include only that specific type of record in the results of the query. This helps narrow your results to display only the information you want to see.

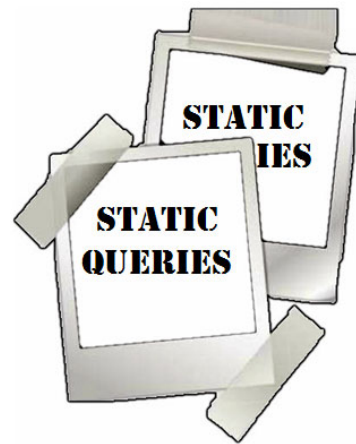
You can create queries based on major record types (constituents, gifts, membership, etc.) or on tabs within some records, such as the Relationships tab of the constituent record or the Participants tab of the event record (if you have *RE:Event*). As previously stated, the query type you select determines what records you will see in your query results.

As for our example query, we're going to select a query type of **Individual**, since we're literally looking for all individuals who donated to last year's annual fund, who have a home phone number. You would NOT want a constituent type query, because constituent queries collect organization records as well. Simple enough.

Query Formats

After you pick your query type, you must select a query format to use. You've got two choices: static or dynamic.

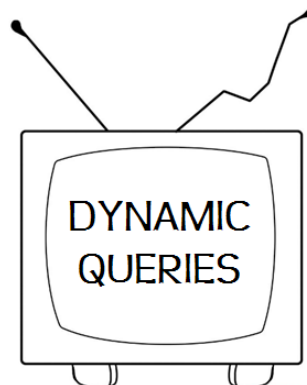
- **Static queries.** Think of static queries as taking a picture, or snapshot, of your data at a certain time. When you take a picture, the contents of that picture will never change; neither will the records that are grouped in the results of your static query. The records it gathers are stationary and do not get updated each time you run the query. If you run a static query today or next year, the same records show up.



Note: Though the actual records the static query returns in its results will not change, when you run the query again later, the information within those records updates and could possibly be different. For example, if you pull a list of constituents to view addresses, and someone's address has been updated since you last ran the query, the new address information will appear. Again, those same constituents will be in your results, but their latest information will display.

The benefit of static queries is that they allow you to maintain information for record-keeping purposes. You can refer to them to see what your data was like at a specific time, and perhaps pull any necessary information you might need again, such as event invitees or donors to a specific fund.

- **Dynamic queries.** Rather than a picture which doesn't change, think of dynamic queries as a live feed, broadcasting the latest information each time it's run. You could create and run a dynamic query in June, then run the same query again in July; when you run it that second time in July, results from the month of June will be included as well.



The benefit of dynamic queries is that they allow you to track the data you require up to the moment you run the query. This is a good way to see changes, or fresh information. When you run a dynamic query, any new records you've added (that meet the query criteria) since the last time you ran the query now show up in the results.

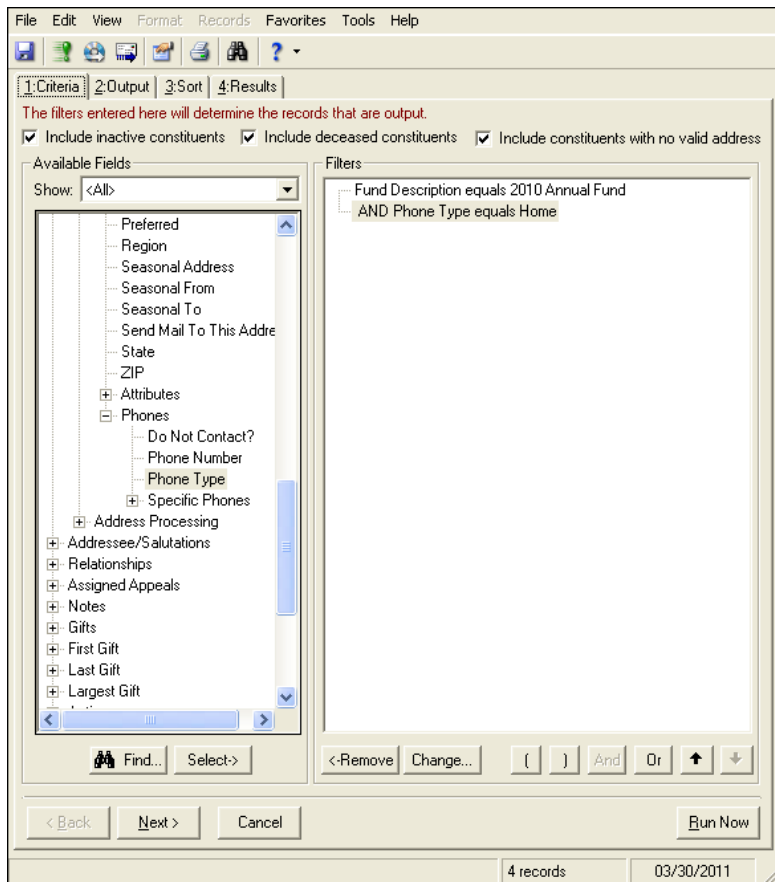
For our example, we'll select a query format of **Dynamic**. This will allow us to get the most up-to-date list of individuals who meet our criteria.

What Specific Criteria Do You Have?

Next question. "What specific criteria do you have?" After you have your query type and format selected, you can add some parameters, or criteria, to narrow the results of your query. Use criteria to make sure only records with specific characteristics are included in your results. For example, are you asking *The Raiser's Edge* to group a specific set of constituent records such as those with a certain area code; group a set of gifts, maybe those given to a certain fund; or group a set of appeals, maybe all those that are ongoing?

You pick your criteria on the Criteria tab of the New Query page. Provided on the page is a list of all the query fields available to use - basically, all the fields on all the types of records in your database - and you add the ones you want to see to a list of filters.

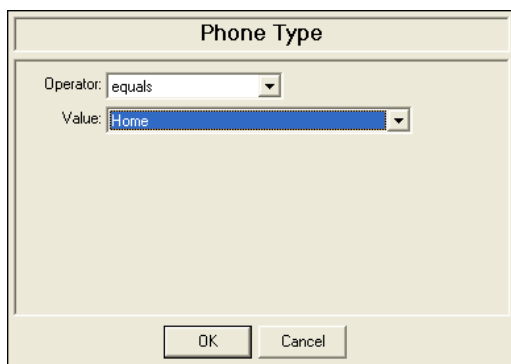
When you run the query to get your results, *The Raiser's Edge* will use your criteria to comb through the records in your database and pick up the ones you want.



For our example query, we need to get a list of all the individuals who donated to last year's annual fund, who have a home phone number. Let's break it down.

First, for the fund. We know that donating to a fund is a type of gift, so open the **Gifts** filter list in the **Available Fields** grid. Next, scroll down to the **Funds** filter list and expand it. Select **Description**, then use the search screen to locate **2010 Annual Fund**. Leave the operator as **equals**, since we know we only want information for that specific fund in our results.

Now, for the home phone numbers. Since phone numbers are stored within addresses, open the **Address** filter list in the **Available Fields** grid. Select **All Addresses**, and then expand the **Phones** filter list. Select **Phone Type**, leave the operator as **equals**, and set the value to **Home**, since we specifically want home phone numbers.




What we just did was tell *The Raiser's Edge* that we're looking for individuals who gave a gift to a fund called "2010 Annual Fund," and out of those individuals, who has a phone type of Home listed on their constituent record. Perfect!

Hey, What Were Those Things?! (Operators)

When you set your criteria, I'm sure you noticed you had to select some things called "operators." Operators help determine the conditions a record needs to meet to turn up in your results. Whenever you create a query or ask *The Raiser's Edge* to group records a certain way, you have to set the conditions a record needs to meet to be part of that group. In other words, say you've picked the criteria field you want to base your query on. Operators help make sure only records with certain entries in that field make it into your results.

There are lots of operators to use, such as Equals, Does not equal, Greater than, Less than, Between, Not between, Blank, Not blank, etc. These allow you to create statements that define the conditions of your query, such as, "I want to see all gifts greater than \$100." In this statement, the criteria is Gifts, and the operator is greater than \$100. This narrows your gift criteria from all gifts, to only those more than \$100.

For our example query, we said we wanted to see the results for the fund whose name is exactly, or "equal to," *2010 Annual Fund*. We also asked for phone types "equal to" *Home*.

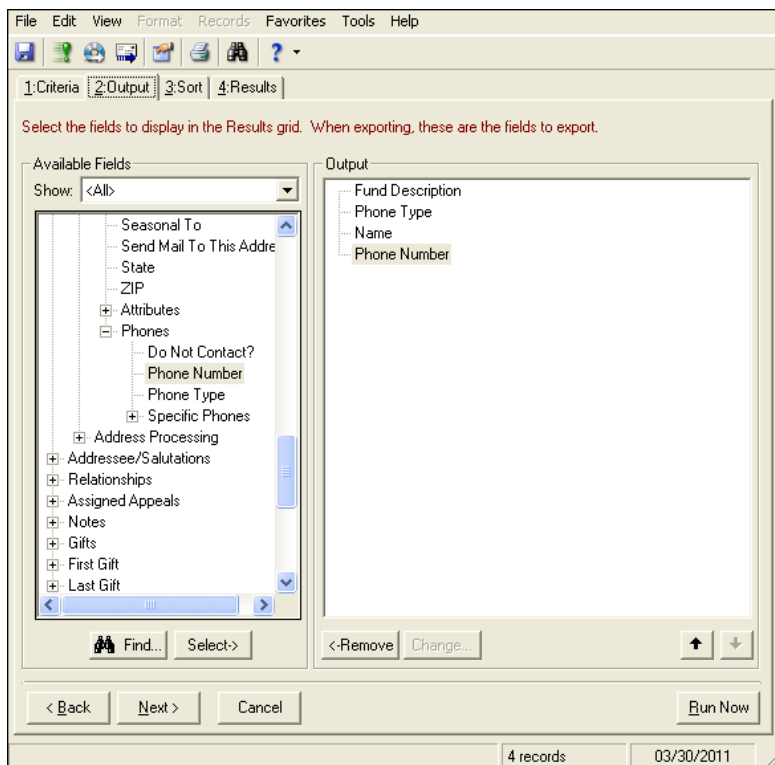
What Do You Want to See in the Output?

We're getting close. The next question to consider is, "What do you want to see in the output?"

After you determine your query criteria to filter your search, you can tack on some output fields to display the exact information you want to see in your results.

While output fields are not necessary to create your query and use it in other areas of the program such as for mailings and reports, they are necessary in displaying your results in *Query*. We suggest you go ahead and use output fields so you can confirm in your query results that you have grouped the correct records.

On the New Query page, select the Output tab, and you'll notice that **The Raiser's Edge** automatically created output fields for each filter you selected on the Criteria tab. However, here on the Output tab, you can select as many additional fields as you'd like. These output fields will be displayed as column headings in your query results, making the information you want easy to read.



Alright, since we already set criteria to filter for the 2010 Annual Fund and home phone numbers, they're already added to the **Output** grid. So let's think of what other information would be helpful to see in our results. Well, in order to call the folks who fit our criteria, we're going to need to see their names and phone numbers.

To get the names to show in our query results, open the **Constituent Information** filter list in the **Available Fields** grid, then move **Name** over to the **Output** grid.

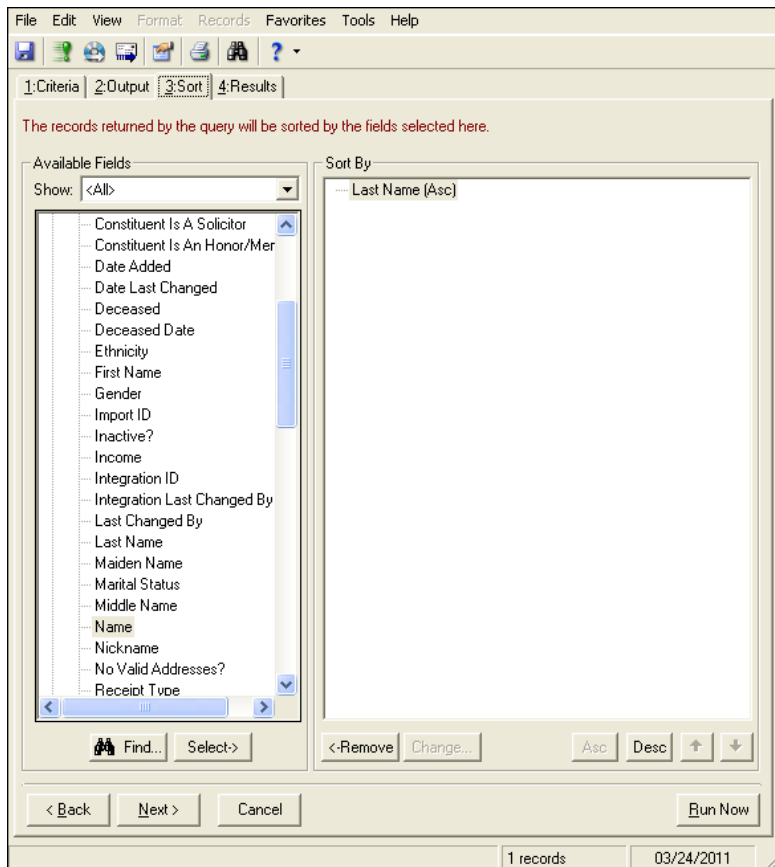
To get phone numbers to show in our query results, open the **Address** filter list in the **Available Fields** grid, and then expand the **All Address** list. Expand the **Phones** list, and move **Phone Number** over to the **Output** grid.

Great! Now when you view your results, you will see the names and home phone numbers for all who donated to the 2010 Annual Fund!

How Do You Want the Results Displayed?

The last question to consider before you run your query should be, “How do you want your results displayed?” This is where sorting comes in. It’s not necessary, but it’s helpful in organizing your results.

On the Sort tab of the New Query page, you can select the fields you want to sort by, and the sorting order. You can sort in ascending or descending order.



Just for kicks, let’s set our results to be sorted alphabetically by last name, in ascending order.

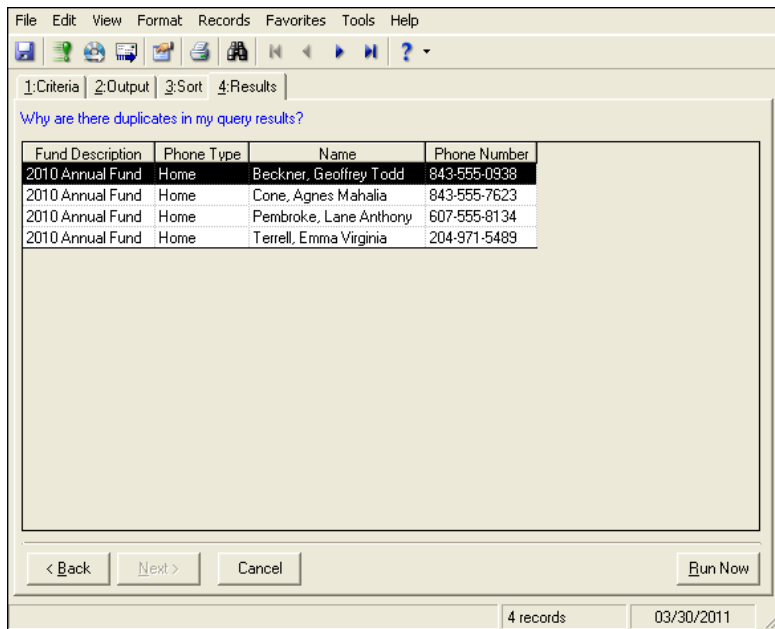
Open the **Constituent Information** filter list in the **Available Fields** grid, then move **Last Name** over to the **Sort By** grid. Ascending order is the default, so we’re good there.

Let’s See Some Results!

Alright! You’ve considered all the important questions, and you’ve got your query all set up. It’s time to check out your results.



Click the **Run Query** button, or simply select the **Results** tab and watch *Query* do its work! All of the records that meet the criteria and output fields you set are displayed, and listed according to the selections you made on the Sort tab. Perfect!



Warning: Heads up, there might be some duplicates in your results! For example, if you’re looking for all who gave donations to a specific fund last month, and someone gave two separate gifts in that time frame, they’ll appear twice in your results. A quick way to get rid of duplicates is by “suppressing” them. To suppress duplicates, on the New Query page, click **Tools** on the *Query* toolbar, and then select **Query Options**. On the Query Options screen, select the Record Processing tab, and select the **Suppress duplicate rows** checkbox. Click **OK**.

Lastly, don’t forget to save your query so you can easily run it again if you need! When you do, make sure to use a good name and description so it’s easily identifiable: maybe something like, “2010 Annual Fund donors with phones,” and “Individuals who donated to 2010 Annual Fund, with home phone numbers.”

Thanks for reading this quick tour of *Query*. The information here should be enough to get you started on making some queries of your own, but for more comprehensive information, check out the full *Query* user guide.