The Raiser's Edge™

Query and Export Guide

Contents

What Is In This Guide?

In the *Query & Export Guide*, you can learn about extracting information from ***The Raiser's Edge*** and exporting data to other software programs. You can also learn about the following.

- "Understand the Ask Operator" on page 25
- "Create a relationship query using address processing" on page 38
- "Create a query of records with nothing in common" on page 75
- "Eliminate Duplicates From a Query" on page 104
- "Export Formats" on page 140
- "Export contact name and address information" on page 175
- "Send an Export Data File as Email" on page 200
- "Add an export to the list of favorites" on page 203

How Do I Use These Guides?

The Raiser's Edge user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access the ***Raiser's Edge*** documentation from several places.

User Guides. You can access PDF versions of the guides by selecting **Help**, **User Guides** from the shell menu bar or by clicking **Help** on the Raiser's Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.com. From the menu bar, select **Support**, **User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can learn about ***The Raiser's Edge*** by accessing the help file in the program. Select **Help**, **The Raiser's Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter "Load Defaults". The help file searches for the complete phrase in quotes instead of individual words.

Query

Procedures

Query, as the name implies, is a way of asking questions of your database. With the *Query* module, you can select, group, and list records that meet a set of conditions you define. Queries are used throughout *The Raiser's Edge* to limit the scope of a task to a group of selected records. For example, you can use a query to group all constituents in your database who are board members. When you create a query, you define the records you want to include. When you use a query in another areas of the program, such as *Mail* or *Reports*, the program processes only the records matching the query definition. To create a query, you must establish criteria or conditions a record must satisfy in order to be included in the query. The program then locates and lists specific records based on this criteria.

Query performs two tasks. First, it segments your database based on criteria you define. Secondly, it groups records for quick reference and use in other areas of the program, such as *Mail*, *Export*, or *Reports*. For example, you can create a query of all constituents who donated $100 to your organization's Capital Campaign and then create mailing labels for this group.

> **Warning**: *Query* is not meant to be used as a reporting tool. *Query* groups records you can then use with other areas of the program such as *Reports*, *Export*, and *Mail*.

Use *Query* to group certain records in your database based on criteria you define. Then, "ask" the program to display specific information about the records to check the accuracy of your query. For example, you create a campaign query for your organization. This query contains information for campaigns currently receiving donations. For the query results, you want to list the name of the campaign and the campaign goal. By selecting output fields for query results, your query not only groups the records based on criteria you specify, but also provides information to check the query. You can assign a sorting order to output fields and define formatting for fields containing date, number, currency, amount, and code table values.

Query is very versatile. You can choose from up to 13 query types. You can create, edit, and delete queries. In addition, you have the option of merging two queries to create a third. You can use *Query's* customizing capabilities to create templates for the queries you run most frequently, customize the format of the results, and export the information on the Results tab to a word processing or spreadsheet program.

Frequently Used Terms

To use *Query* correctly, you must have a basic understanding of the different terms used to describe parts of the querying process. If you come across an unfamiliar term when reading this or any chapter in *The Raiser's Edge* documentation, make sure you check the online glossary in the help file.

Available Fields. This is a list of all information categories containing fields you can use in your query. The fields you can use are based on the type of query you are creating. Fields for each query type are listed in categories of information which can be expanded to reveal all the fields that fall under each category. For example, if you want to create a gift query, only fields pertaining to the gift record are available for selection.

Control Report. This is a report listing the criteria fields and criteria operators selected for a query. The report also shows the sort and output fields selected for the query, the name you assigned to it, and the location where the query was saved.

Criteria Fields. You can use criteria fields to make a global selection of records to include in your query. For example, if you use **Gift Type** as a criteria field, the program looks at constituent gift information and "groups" all records with any gift type information.

Criteria Operators. These fields, in conjunction with criteria fields, let you define the specific conditions a record must meet to be included in a group. Using the earlier example, if you select the criteria field **Gift Type**, the program searches the database and "groups" all records with any gift type information. If you assign the criteria operator "equals" and the value "cash," the program looks at all the grouped records and selects those with a gift type equal to Cash.

> **Warning**: We recommend you limit the number of output fields you select. The more output fields you select, the longer the query may take to run.

Output Fields. These fields determine the information that displays on the Results tab of your query. For example, you are creating a query of all constituents who donated $10 or more to your organization's Literacy Fund during the months of January, February, and March. For all records meeting this criteria, you want to see only the constituent name and gift amount. **Name** and **Gift Amount** are your output fields for this query.

Query. A query is how you flag, group, and list selected records from your database that meet certain criteria you define. Think of your database as a filing cabinet. Running a query is very much like asking someone to look at all the records found in your filing cabinet and create stacks of records based on the criteria you define.

Sort Fields. These fields determine the order in which records appear on the query Results tab. You can sort in ascending or descending order. For the above, you can select **Last Name** and **Gift Amount** as your sort fields. You can sort alphabetically by last name, numerically by gift amount, or by using both fields.

Tips When Using Query

Selecting, grouping, and creating lists in *Query* is not always the easiest task. *Query* is used for two very important reasons: to segment your database based on criteria you define and to group records for quick reference and to use in other areas of *The Raiser's Edge*. As you create a query, make sure you have a clear understanding of what the task involves. Once you learn query basics in this chapter, refer to this list to help clarify certain aspects of the process.

- **Query duplicates are not a cause for concern:** Just because a record is 'duplicated' in your query results does not mean it is also duplicated in the query itself. Query duplication occurs when you include one-to-many fields in the query output. For example, if you place phone number in the output, and John has three phone numbers, each number appears on a separate row in the query results. However, when you save the query and use it to run labels, John's name appears only once.

  If your query output does not include one-to-many fields, use the **Suppress Duplicate Rows** option to minimize duplicates. For more information about suppressing duplicate rows see, "Eliminate Duplicates From a Query" on page 104.

- **Query is not a reporting function:** *Query* is designed to group records, and is not intended to be a reporting tool. That being said, if you need a quick and easy list of names, printing your query results may be adequate. However, if you need a polished report, save the query and use it in *Reports*.

- **Exporting from Query is not a good idea:** *Query* is a grouping tool, and, although you can export query results, you will most likely prefer your results when they are exported from *Export*. When you export from *Query*, you are exporting exactly what you view in the query results (which is typically not what you actually want).

- **Existing queries do not have to be run or refreshed:** An existing query is ready for use anywhere in *The Raiser's Edge*. When you create a new query, you can run it to make sure it includes the correct records. Doing so is not necessary in order to save the query.

- **Field values are not saved with static queries:** Until a static query is refreshed, it includes the same records it did when it was first created (or last refreshed). For example, Tom is a board member and is included in a static query of all board members. The query output includes names and addresses. If you remove the Board Member constituent code from Tom's Bio 2 tab and then run (not refresh) the query again, Tom's name and address no longer appear in the query results. However, Tom is still included in the query until it is refreshed. To verify, you can use the query to run labels in *Mail* — Tom's name still appears.

Navigate in Query

The Raiser's Edge Query page contains the commands necessary to complete all query functions. You can customize this screen with shortcuts to facilitate your access to query records and reduce the time it takes to perform certain query functions. For more information about customizing the Query page, refer to "Customize Query and Use Favorites" on page 62.

Parts of the Query Page

Note: The appearance of the Query page varies depending on the preferences you select on the User Options screen.

In order to navigate through *Query*, you must understand the parts of the Query page. To access the Query page, click **Query** on the Raiser's Edge bar. The Query page appears.
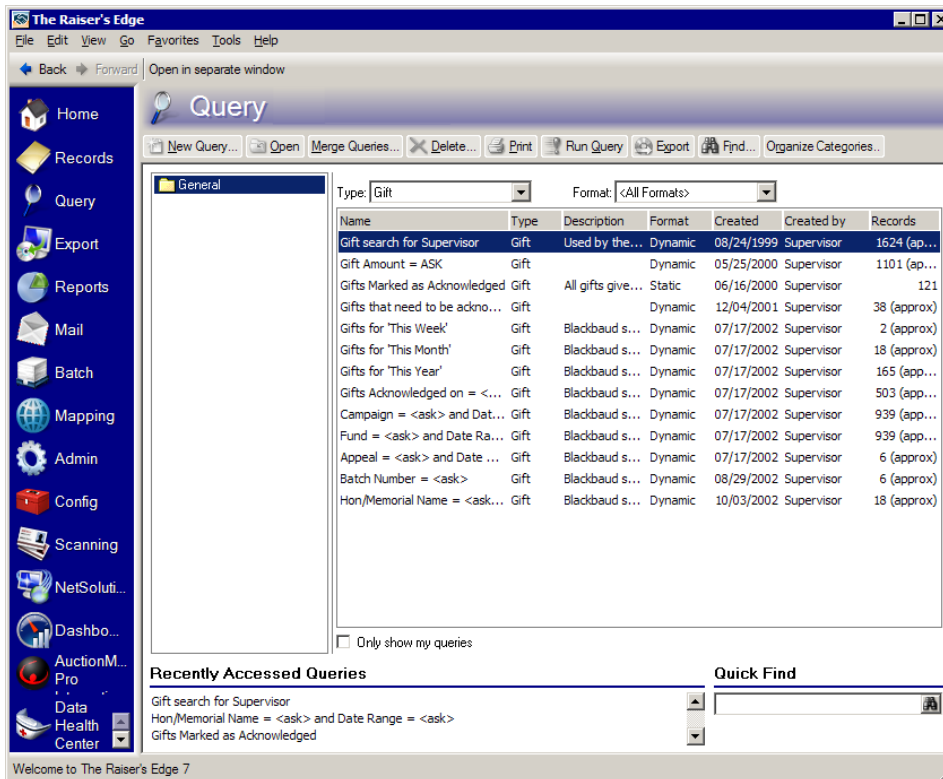
The Query page contains four main components: query action bar, query filters, query grid, and query locators.

•

Query Action Bar

You can perform several query tasks from the Query page. Links on the action bar provide a shortcut to the most commonly performed query tasks. From the Query page, you can create, open, merge, delete, print, run, export, and find a query. You can also organize queries into categories. To begin any of these tasks, simply click the query link and the screen for that function appears.
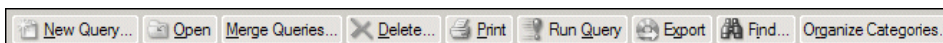
Query Filters

Query filters let you determine which queries display in the query grid. You can filter by query type or query format, or you can elect to show only the queries you created. The **Type** and **Format** fields and the **Only show my queries** checkbox are extremely helpful because they can reduce the amount of time it takes to locate a query. For example, if you are searching for a gift query you created, you may want to use the query **Type** Constituent and the **Only show my queries** checkbox as filters.
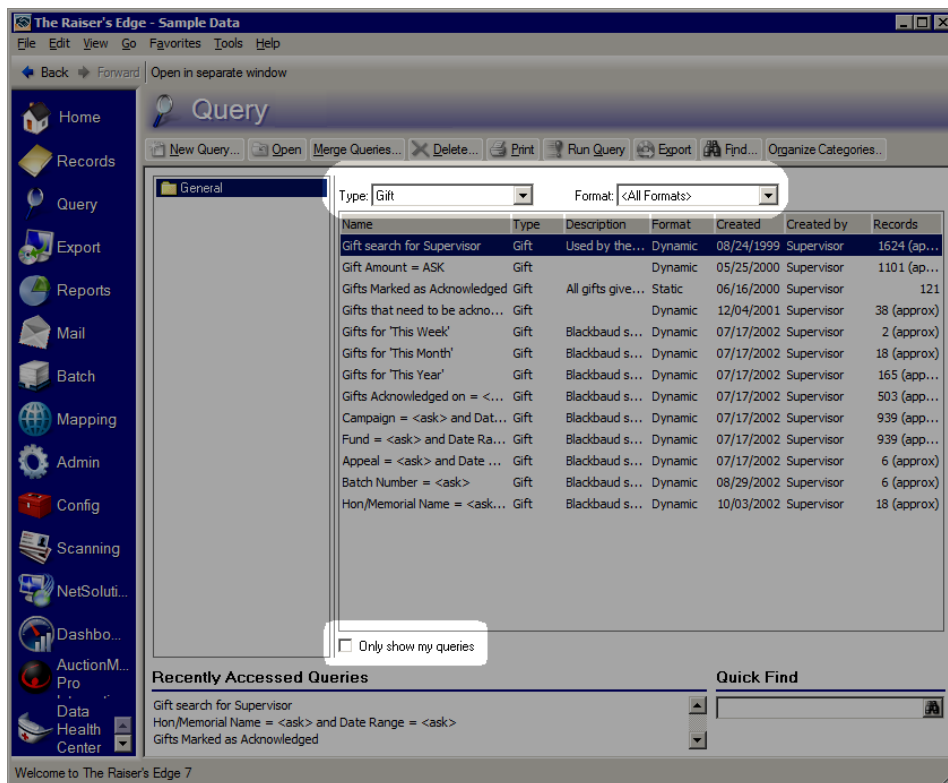
Query Grid

The query grid displays all queries matching the query filters you use. This grid is for informational purposes only. You can only enter and edit the information in this grid from the query record. To find a query, click the up and down arrows on the scroll bar to scroll through the list.

Query Locators

Below the query grid are two areas you can use to search for queries. The **Recently Accessed Queries** frame displays a list of the most recently opened queries. You can use the **Quick Find** field to enter the name of a query and locate it without opening the query search screen. If you have numerous queries in the query grid, you can hide these two areas if you select **View**, **Expand Query List** from the shell menu.

Query Usage

On the Query page, many query records may be displayed in the query grid. To provide more information that may help differentiate between queries, you can view where in the system each query is currently being used. When you select a query in the grid, under **The selected query is used in the following...** at the bottom of the page, you can view the name of the process where it is used, what type of process it is, and who created the process. For example, you can select a query for event participants and see that it is currently being used in an Event Summary Report, and it was created by your supervisor.

> **Note**: For some process types, you can click the name of the process where the query is being used to access the process record.

Access a Query

A query record stores all criteria, output, and sort field information. Once you create queries, you can perform a variety of tasks with them, including editing and deleting. You can open queries directly from the Query page by scrolling through the grid, highlighting the query you want to open and clicking the **Open** link. Another way to access queries is from the Open Query screen. Enter all or part of the name of the query you want to open in the **Quick Find** field on the Query page and click the binoculars. The Open Query screen appears, which helps you locate a query by various details, such as query type, name, format, and description. The description is useful if you do not know the exact name of the query you want to open. Use some or all the fields in the **Find queries using these criteria** frame on the Open Query screen to narrow your search.

▶ **Open a query record**

Tip: You can also click **Find** on the action bar of the Query page to access and locate a query.

1. On the Raiser's Edge bar, click **Query**. The Query page appears.
2. In the **Quick Find** field on the bottom right of the screen, enter the name of the query and click the binoculars.
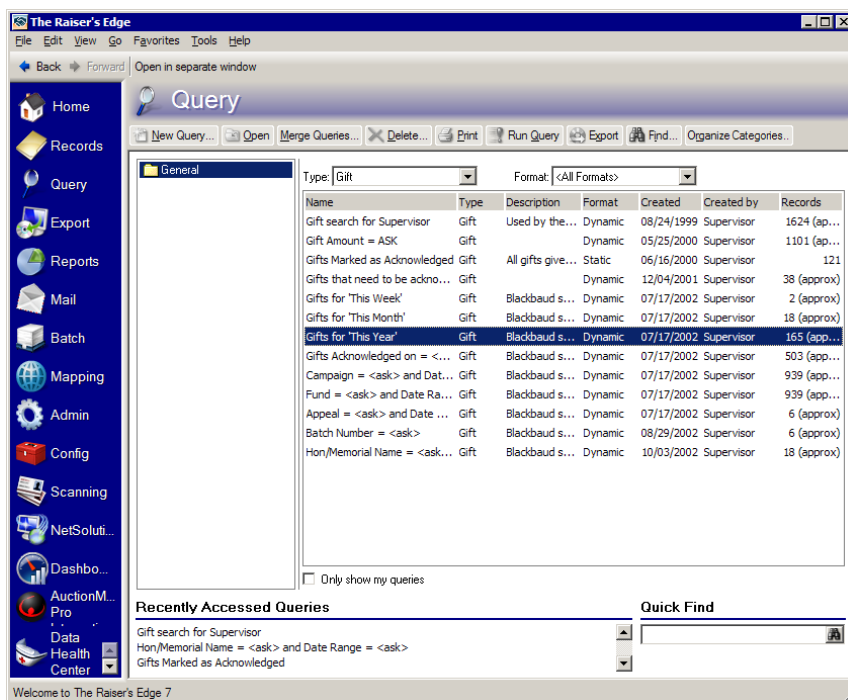
If there are no queries matching the description you provided, the Open Query screen appears.

Warning: We recommend using the filter fields on the **Find Queries that meet these criteria** frame sparingly. Adding too many filters can narrow your search too much, resulting in no matches.

3. In the **Find Queries that meet these criteria** frame, decide what criteria you want to use to search for the query and enter the information in the appropriate fields. You can search by **Query type**, **Query format**, **Query name**, **Description**, **Created On**, or **Created by**. Use the **Created On** field to enter the date the query was created. The **Created by** field helps you locate a query by its author.

4. If you are searching for merged queries, you can narrow your search by marking the **Show merged queries only** checkbox. This checkbox displays only merged queries in the results grid.

Note: Queries created from reports do not appear in the grid. However, they can be used as a source for a new query. For more information, see "Use Output Queries as a Source for a New Query" on page 106.

5. If you want to display only queries that meet the exact criteria you define, mark the **Exact match only** checkbox. If you mark this checkbox, an asterisk is taken literally and not as a wildcard. This means that the query must contain an asterisk in its name to appear in the results grid. For more information about wildcard characters, see "Understand Wildcard Characters" on page 26.

Note: You can click the **Expand Results** button to make the query list area larger.

6. Once you enter all your search criteria, click **Find Now**. The program searches the database and locates all queries matching the criteria you entered. These queries appear in the grid.
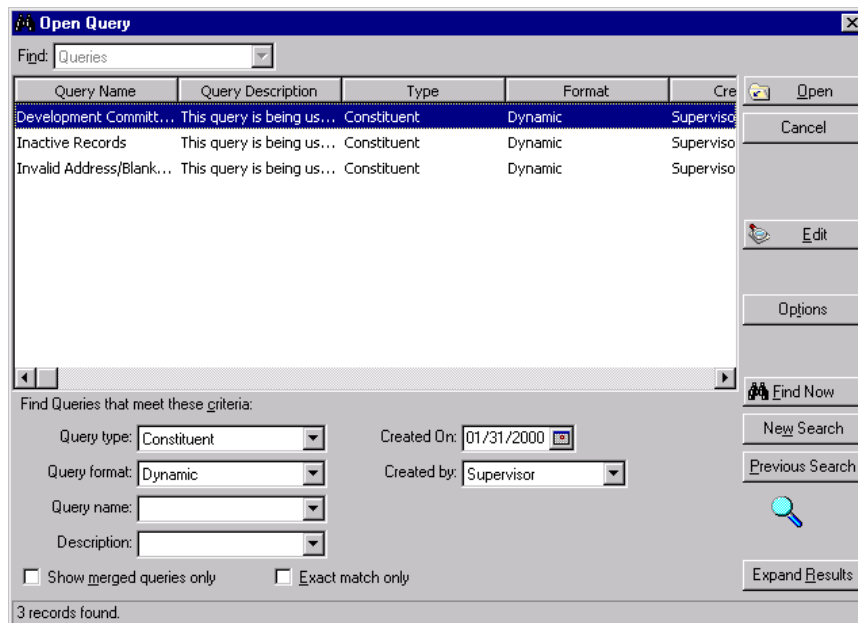
7. Once you locate your query, highlight it and click **Open**. The selected query record appears.
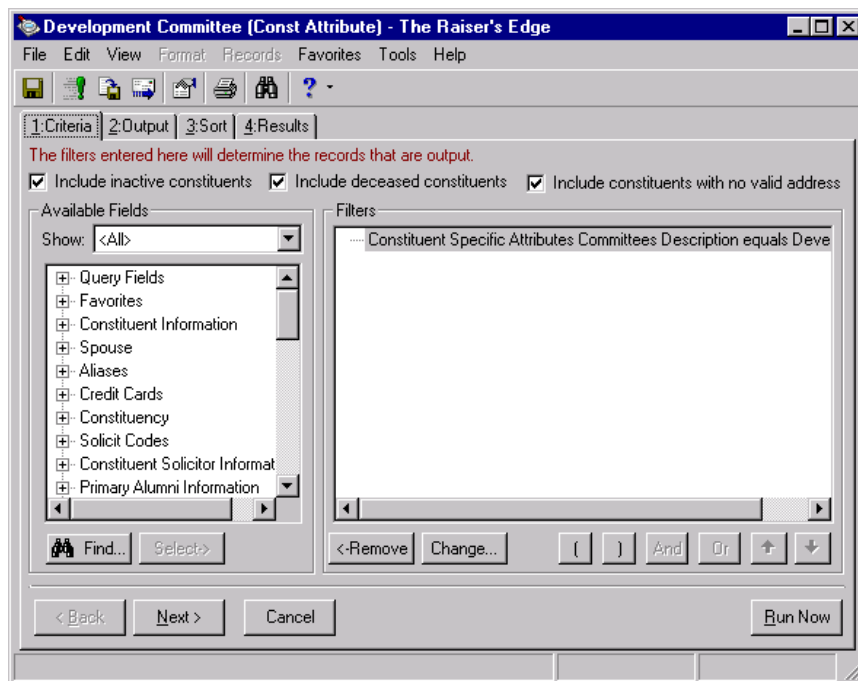
8. Make the appropriate changes and click **Save** to save the query record.

9. Close the query record by selecting **File**, **Close** from the menu bar.

Toolbar Buttons

The toolbar contains buttons representing common commands used in *Query*. By clicking these buttons, you can easily perform a function, such as saving, without using the menu bar. Some of the buttons listed below only appear on the Results tab of an opened query.

> **Note**: You can set up a user option that enables you to view tooltips that explain the function of each toolbar command. Tooltips appear when you move your cursor across each item in the toolbar. For more information about setting up this user option, see the General Options section of the User Options chapter of the *Program Basics Guide*.

Save the current query

Run the current query

Export query results

Send query results as mail

View query properties

Print query results or query control report

Find query fields

Go to the first query record

Go to the previous query record

Go to the next query record

Go to the last query record

Access help contents

For more information about menu bars, see the Program Basics chapter of the *Program Basics Guide*.

Query User Options

User options are preferences you set that affect how *The Raiser's Edge* looks and runs on the workstation you are using. User options are login-specific, which means that if you log into any workstation using your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. You can establish user options by selecting **Tools**, **User Options** from the menu bar on the shell of *The Raiser's Edge*. The Options screen appears so you can establish certain user options that apply to gift records. For more information about user options, see the User Options chapter of the *Program Basics Guide*.

Your ability to access User Options is based on your access rights as defined in *Security*. For more information about user access rights, refer to the Security chapter of the *Configuration & Security Guide*.

You can establish general, advanced, and code table default query settings. Use these options to set preferences for creating and running queries.

▶ **Set General query options**

All query options are located on the Query tab of the Options screen. Your selection in the list on the left determines which options display on the right.

1. From the shell menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Query tab. The tab opens with **General** selected in the list on the left. The General query options appear on the right.
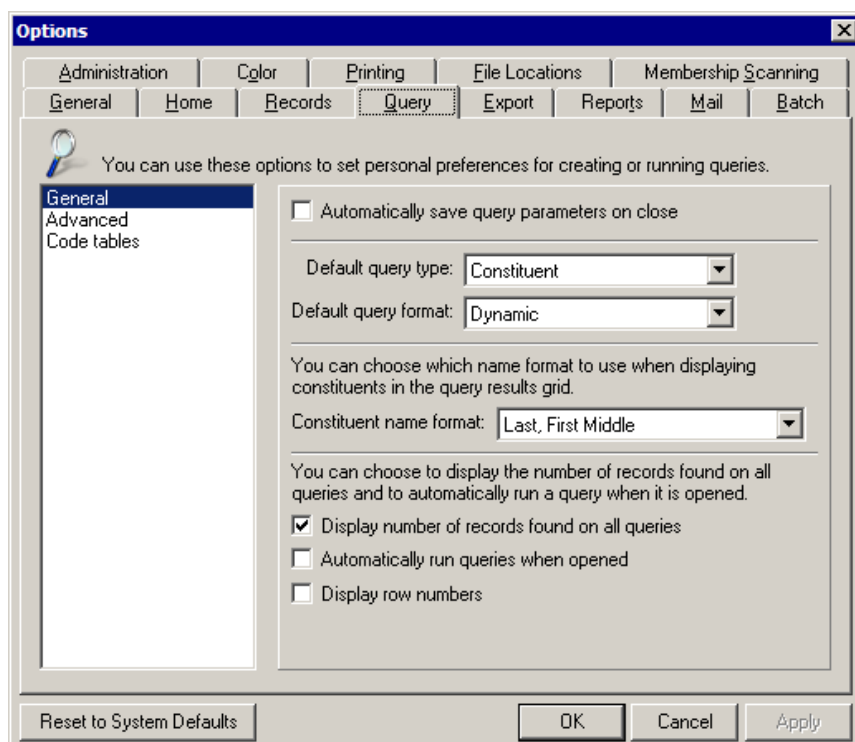
> **Note**: Parameters refer to any field, option, or filter that narrows information used in a query. By naming and saving the query, you can reuse it or open and modify it and save it under a new name instead of starting anew.

3. You can mark a checkbox to **Automatically save query parameters on close**. If you have not saved a query before, when you close it (whether or not it has been run), the Save Query As screen appears so you can name and save the query. If you already saved the query, when you close it after making changes, any new parameters are automatically saved without the Save Query As screen appearing. We recommend you mark this checkbox and always name and save your queries for future use.

4. Define a **Default query type** for new queries. If you create one type of query more often than others, entering it as your default can speed data entry. For example, if you run constituent queries more often than any other type, entering it as your default saves time when you create queries.

Note: We recommend you select Constituent as your **Default query type** and Dynamic as your **Default query format**. These are the most commonly used options. Constituent queries give you access to all fields in your database. Dynamic queries automatically update every time they are used.

5. Enter a **Default query format**. Select either "Dynamic" or "Static". If you want most of your queries to include new records each time you run them, select "Dynamic". If you want most of your queries to include only the records selected at the time you create the query, select "Static". For more information on dynamic and static queries see "Query Formats" on page 22.

6. Select a **Constituent name format** to determine how constituents display in the query results grid. For Output and Criteria tabs, the **Name** field appears as you define it to display in Query User Options.

7. In the **You can choose to display the number of records found on all queries and to automatically run a query when it is opened** frame, mark the **Display number of records found on all queries** checkbox if you want the number of records to automatically display on the Results tab. You may want to include this number as a quick reference when you run your queries.

8. If you want to save time by going directly to the Results tab when you open a query, you can mark the **Automatically run queries when opened** checkbox.

9. To display row numbers on the Results tab, mark the **Display row numbers** checkbox.

10. Click **Apply** to save your selections and keep User Options open, or click **OK** to save your settings and exit User Options.

▶ **Set Advanced query options**

Advanced options include establishing criteria and sort field defaults.

1. From the shell menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Query tab.

3. From the list on the left, select **Advanced**. The Advanced query options appear on the right.
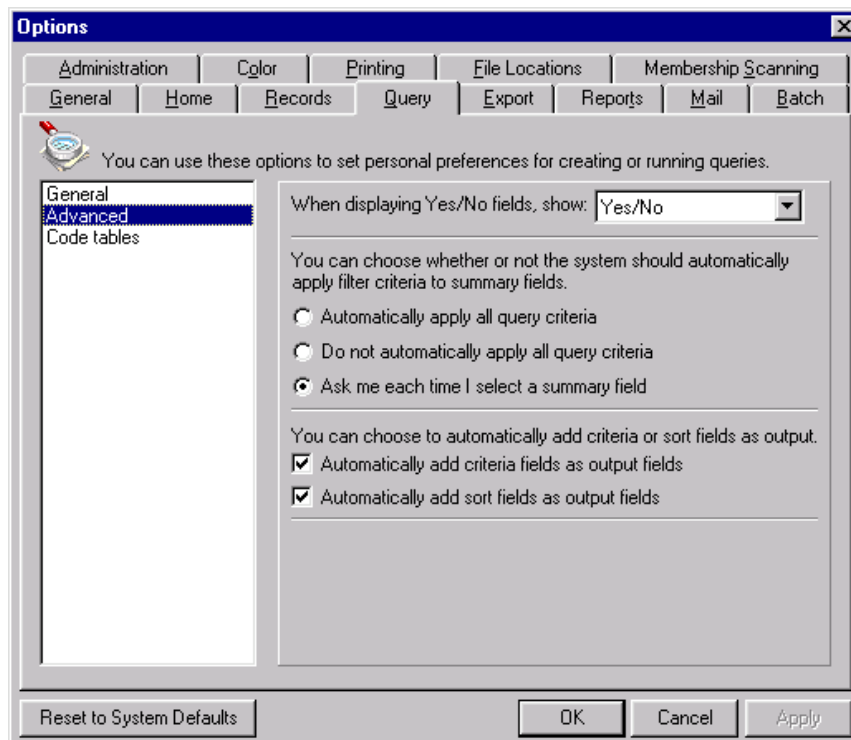
4. Use the **When displaying Yes/No fields, show** field to determine how values for fields that require an "either, or" entry display. The default is Yes/No, but you may want to use another variation such as True/False or Y/N.

Note: Summary fields display sum values for fields. For example, **Total Amount of Gifts** and **Total Number of Job Assignments** are summary fields.

5. In the **You can choose whether or not the system should automatically apply filter criteria to summary fields** frame, you can mark an option to **Automatically apply all query criteria**, **Do not automatically apply all query criteria**, or **Ask me each time I select a summary field**.

If you mark **Automatically apply all query criteria**, any field you select as criteria is automatically applied to any applicable summary field you choose. For example, you may filter constituents by gifts given to your Annual Fund. If you elect to automatically apply filters to summary fields, the total amount for a constituent includes only gifts given to this fund. If you do not automatically apply filters to summary fields, the total amount reflects all gifts given by a constituent. Automatically applying your criteria to all summary fields can save a great amount of time, as opposed to specifying whether you want the criteria to apply each time you select a summary field.

If you mark **Do not automatically apply all query criteria**, when you select a summary field, you must specify if you want the filter fields you already selected to apply to the summary field.

If you mark **Ask me each time I select a summary field**, each time you select a summary field, and at least one applicable criteria field is already selected, a message appears asking if you want to apply applicable criteria to the summary field. Click **Yes** to apply the criteria.

Tip: If you usually make your criteria or sort fields output for your queries, you can save time by marking a checkbox to automatically include them as output every time you run a query.

6. In the **You can choose to automatically add criteria or sort fields as output** frame, you can mark a checkbox to **Automatically add criteria fields as output fields**, so whenever you run a query, any fields you select as criteria also appear as output for the query. You can do the same with the fields you select to sort the query when you mark the **Automatically add sort fields as output fields** checkbox.

7. Click **Apply** to save your selections and keep User Options open, or click **OK** to save your settings and exit User Options.

▶ **Set Code tables query options**

Note: A field with a down arrow to the right is a code table. You can display entries for some tables in either a short or long description. Once you become familiar with your entries, you may want to display the short entries to save time.

You can select how code tables, such as **State** and **Constituent code**, display and sort in queries.

1. From the shell menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Query tab.

3. From the list on the left, select **Code tables**. The Code tables query options appear on the right.
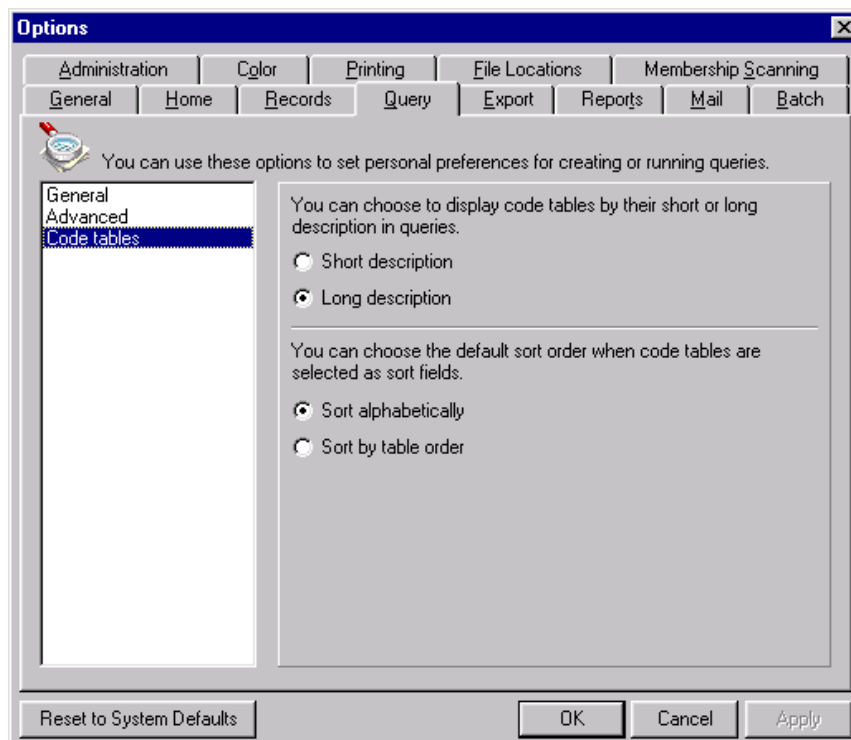
4. In the **You can choose to display code tables by their short or long description in queries** frame, you can mark an option to display the **Short description** or **Long description**. For example, if you want to view the constituent code Volunteer as "VOL" in *Query*, select **Short description**. If you want to view the word "Volunteer", select **Long description**.

5. In the **You can choose the default sort order when code tables are selected as sort fields** frame, you can mark an option to **Sort alphabetically** or **Sort by table order**.

Note: If you want to undo any changes you made and reestablish all program settings, click **Reset System to Defaults**. To exit User Options without saving your most recent changes, click **Cancel**.

6. Click **Apply** to save and apply your changes and keep the Options screen open. Click **OK** to save your changes and exit the Options screen. For more information about User Options, see the User Options chapter of the *Program Basics Guide*.

Query Record Components

A query is a file containing all records that meet the criteria you specify. A query also stores criteria fields selected, criteria operators used, and the sorting order of output fields. You can customize your query record. This is helpful if you want to create templates for the queries you run most frequently. For example, you can establish default query types and formats based on what you use most often, or you can create a list of your favorite query fields. Creating a list of your favorite or most often used query fields is very helpful in reducing the time it takes to search each information category to find the fields you want to use. You can also establish preferences to automatically add criteria and sort fields to the query's output. All these options simplify the querying process and help you save time.

A query record screen is composed of four tabs:

the Criteria tab, the Output tab, the Sort tab, and the Results tab.

Criteria Tab

Note: On the Criteria tab, the **Name** field appears as you define it to display in the **Constituent name format** field in Query User Options.

On the Criteria tab, you can select the criteria fields and enter criteria operators to determine which records to include in the query. For example, if you are creating an individual query to find the names of everyone with a home telephone number for a phonathon, you can use the criteria field **Phone Type** "equals" Home to group all individual records with a value in this field.
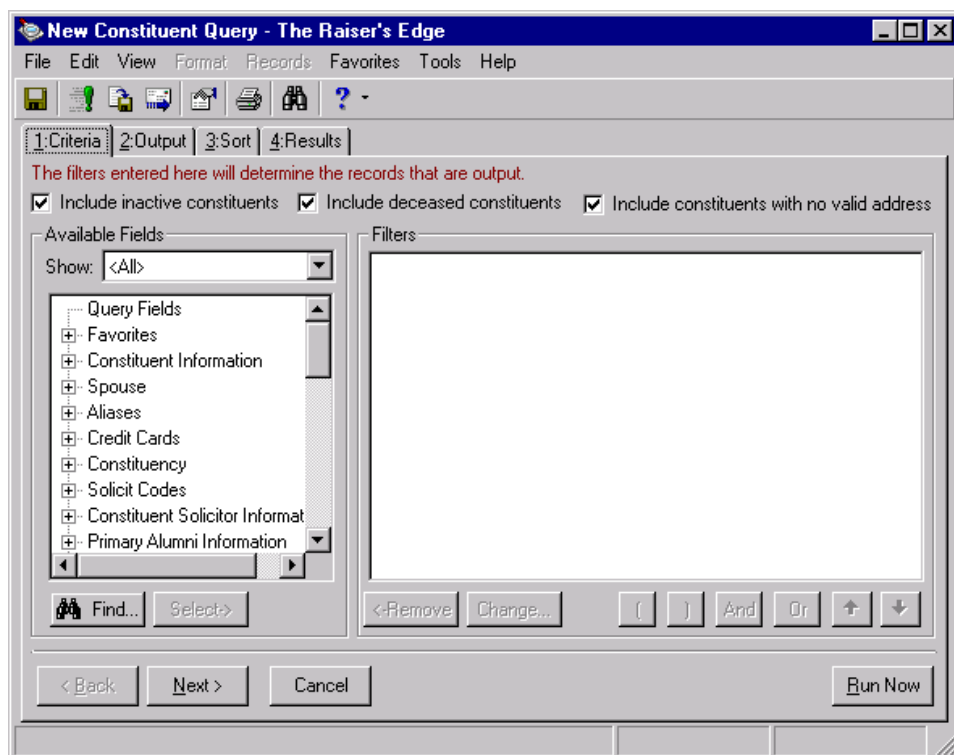
Output Tab

Note: On the Output tab, the **Name** field appears as you define it to display in the **Constituent name format** field in Query User Options.

On the Output tab, you can select the output fields corresponding to the information you want to see in the query results. These fields appear as column headings in your query Results tab. Output fields are optional, but they facilitate the viewing and interpretation of your query results. For example, if you are creating an individual query to find the names of everyone with a home telephone number for a phonathon, you probably want to have **Name** and **Phone Number** as output fields. Remember, the more output fields you select, the longer the query may take to run.
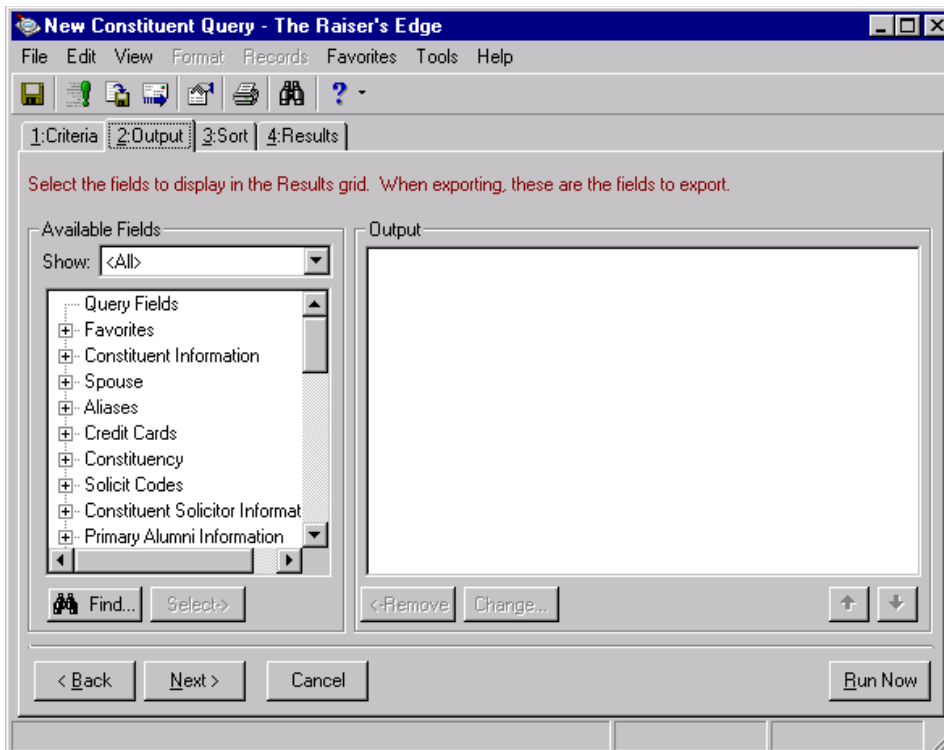
Sort Tab

Note: If you enter a backslash (\ ) in the constituent name on the constituent record, *Query* sorts as if that name started with the letter after the backslash. For example, if you enter The\Computer Warehouse in the **Org Name** field on the Bio 1 tab of an organization's record, The Computer Warehouse is sorted using the C from "Computer", rather than T from "The".

On the Sort tab, you can select the fields you want to sort by and the sorting order. You can sort in ascending or descending order. Sort fields are optional. For example, if you are creating an individual query to list the name and home telephone number of individual constituents for a phonathon, you can select an ascending sorting order using the last name of the individual.
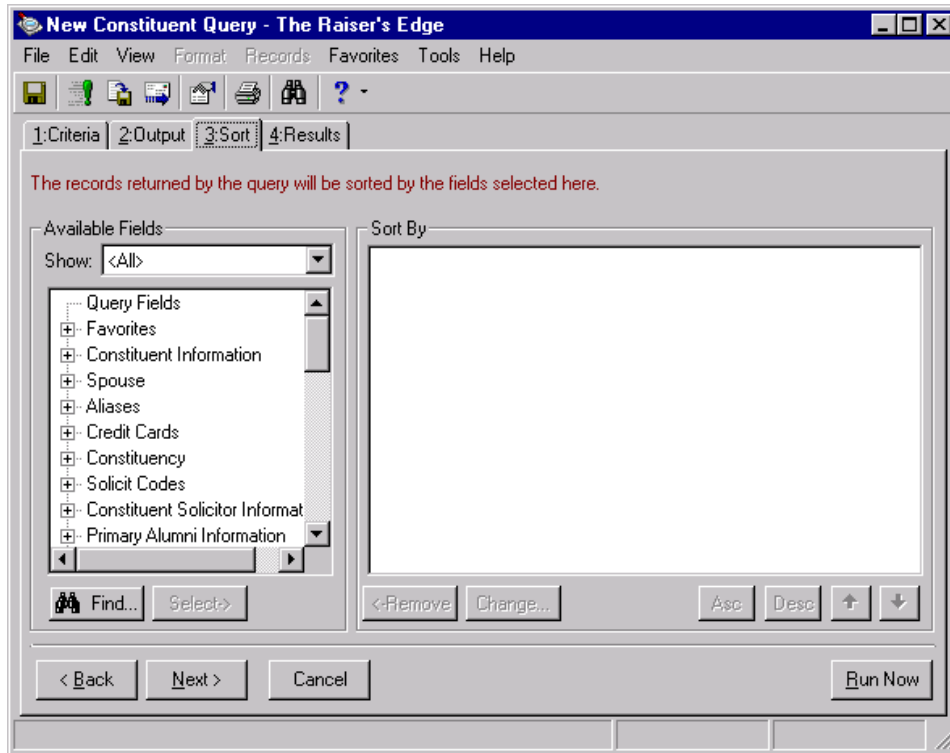

If you choose the **Name** field on the Sort tab in *Query*, the query sorts by **Last Name**, **First Name**, and **Middle Name** for individuals and by **Organization Name** for organizations.

> **Note**: It is important to use **Sort Key** if your query contains two constituents with the same name. This way, you can easily recognize the constituents as two individuals rather than one because **Import ID** is used in the sorting. **Import ID** does not appear in query results. However, it does appear in *Export*.

In addition, you can use the **Sort Key** field to alphabetize your records. The **Sort Key** field is used most often for exporting purposes. This way, you can easily maintain the original sorting order in another software application, such as *Crystal Reports*. For Individuals, **Sort Key** combines **Last Name**, **First Name**, **Middle Name**, and **Import ID**. For example, John D. Campbell, with an import ID of 12345, sorts by "Campbell,John, D.,12345". For Organizations, **Sort Key** combines the **Organization Name** and **Import ID**. For example, AAA Concrete, with an import ID of 45678, sorts by "AAA Concrete,45678".

Results Tab

The Results tab displays the filtered data organized in columns resulting from your Criteria, Output, and Sort field selections. This is a listing of the actual data found in your database. To determine how names display in the query results grid, select a name format in the **Constituent name format** field in Query User Options.
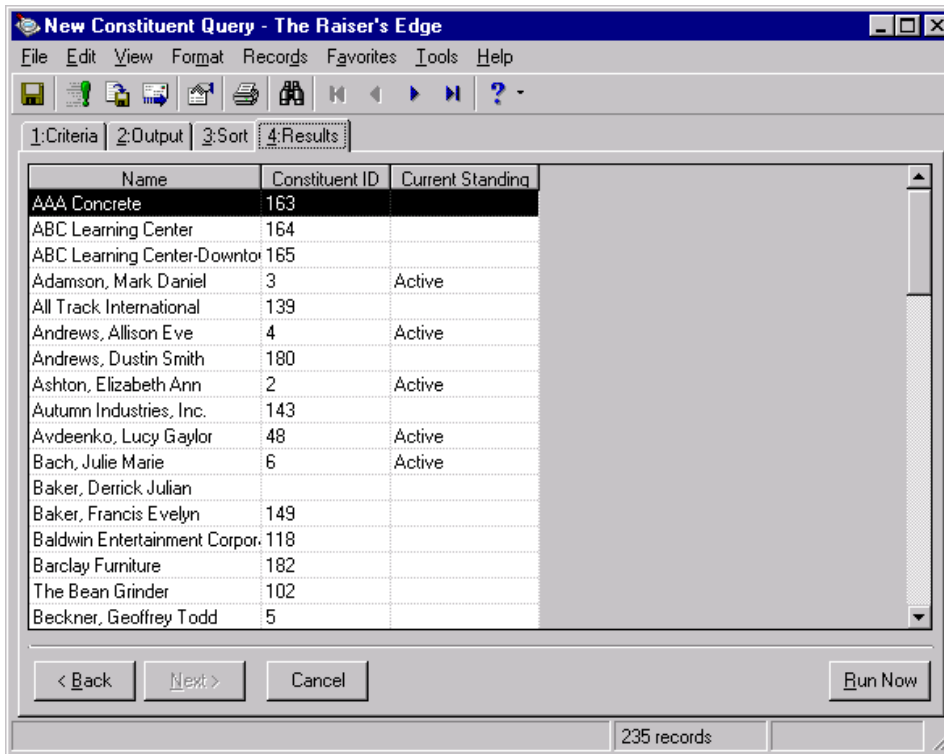
Query Types

Understanding the different query types is essential to using *Query* properly. Selecting a specific query type instructs the program to select that particular record type for inclusion in the query. Query types determine the field categories available to include in a query.
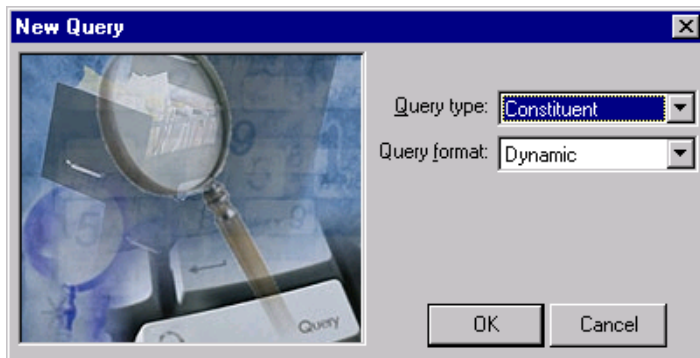
Selecting query types can be considered the first step in narrowing the information available for your query.

Note: In User Options, you can establish your default query type on the Query tab of the Options screen. We recommend you select Constituent as your default. Constituent queries give you access to all the fields in your database. For more information, see "Query User Options" on page 13.

You can create queries based on the major record types found in the program (constituent, gift, fund, etc.). Records are characterized by a series of tabs that organize specific information. You can also create queries using the major information categories found in *The Raiser's Edge* (for example, action, relationship, constituent, gift, and fund). Information categories are usually tabs within a constituent record.

You can select from the following query types.

Action. Action queries are based on action records on the Action tab of a constituent record. For example, if you schedule a meeting with 20 of your organization's volunteers and want to print a quick list with their names, you can use an action query to group the records on which you entered this meeting as an action.

Appeal. Appeal queries are based on the appeal record. For example, the Development Director for your organization wants to locate all appeals with outstanding expenses. You can use the appeal query to group this appeal information and export the results for further analysis.

Campaign. Campaign queries are based on the campaign record. For example, one of your board members wants his company to match the amount donated to your organization's Literacy Campaign and requests information about certain solicitors for your campaigns. You can use a campaign query to group this information for the board member.

Note: The constituent query is the query you will probably use most often. This query type gives you access to all information contained in a constituent's record.

Constituent. Constituent queries are based on the constituent record. Constituents are individuals or organizations in your database who have donated time, funds, or resources to your organization. Constituent queries give you access to all fields you find in other query types. The Constituent query gives you a complete picture of the entire constituent record, including information about gifts, relationships, memberships, and actions. For example, you want to change the area codes for all donors (both individual and organization constituents) who reside or are based in the Miami area. You can use a constituent query to group these records.

Event. Event queries are based on the event record and are available only if you use the optional module *Event Management*. For example, you are finalizing your Annual Conference preparations and want to see if any of your concurrent conference events have the same participants registered for them. You can use an event query to group all participants with scheduling conflicts.

Fund. Fund queries are based on the fund record. For example, you are preparing the book of acknowledgments for the Youth Literacy Campaign and want to make sure you mention the total amount of donations to all the campaign funds. You can use a fund query to group and list these records.

Gift. Gift queries are based on the gift record. For example, you are preparing for your organization's board meeting and need a list of all gifts donated to the Annual Fund this year. You can use the gift query to group and list these records.

Giving Score. Giving Score queries are based on Giving Score ratings each individual receives after your data is scored by *Target Analytics*. For example, you would like to send a targeted mailing for an upcoming campaign to raise funds for a new building and would like it to go to your best donors. You can create a Giving Score query of all individuals in your database with a Giving Score rating of VIP and use that list for your mailing.

Note: You can use query type as filters when searching for a query.

Individual. Individual queries are based on the individual constituent record. For example, your organization is planning the Annual Banquet and the Development Director wants to invite all individuals who have not bought a ticket for the Annual Banquet in two years. You can use the individual query type to group these individuals and export their mailing information to create an invitation letter.

Jobs. Job queries are based on the job record and are available only if you use the optional module *Volunteer Management*. For example, you are planning a training session for your volunteers and need to know how many of them have CPR certification listed as a job qualification. You can use the job query type to group these volunteer records.

Member. Member queries are based on the membership record. This query type is available only if you use the optional module *Membership Management*. For example, you are updating the membership status of your constituents and need to know which constituents have memberships expiring this month. You can use the membership query type to group those records.

Organization. Organization queries are based on the organization constituent record. For example, you are planning a new matching gift campaign and want to see how many of your constituents are matching gift organizations. You can use an organization query to group and list these records. You can then use this list to send out announcements about your new program.

Participant. Participant queries are based on the participant information found on the Participant tab of the event record. This query type is available only if you use the optional module *Event Management*. For example, the Finance Director for your organization wants to know how many of the Annual Conference participants will receive the early registration discount. Early bird registrants need to register by the close of the business day on May 30th. You can use a participant query to group all individuals who paid their registration by the early bird registration deadline.

Relationship. Relationship queries are based on the relationship information on the Relationship tab of the constituent record. For example, Mother's Day is approaching and your organization has decided to send roses to all mothers listed as constituent relationships in your database. You can use the relationship query to group and list all mothers found in your database.

Query Formats

> **Note**: You can use query format as a filter when searching for a query.

The query format determines what records are included when you run your query. Query formats can be used to filter queries listed on the Query page. The two query formats are static and dynamic.

Static Query

A static query is like taking a "snapshot" of your database at the time you are creating the query. Only the records selected when the query is originally created are included when the query is used in the program.

For example, you want to gather information about the first 50 constituents to donate over $5,000 to a new fund in June. You can create a static query with the constituents' names, gift amounts, gift dates, and addresses as the output, so that you can send them special mailings and benefits. By using a static query, no other constituents will automatically be included when you use the query again. The list of the 50 constituents is frozen when you create it and remains the same, unless you choose to "refresh" the query. For more information about refreshing a static query, see "Refresh a Static Query" on page 59.

Dynamic Query

> **Note**: If most of your queries are dynamic, we recommend you select "Dynamic" as your default. You can establish your default query format on the Query tab of the Options screen of User Options. For more information about User Options, see "Query User Options" on page 13.

A dynamic query is automatically refreshed each time it is used. When you use a dynamic query, the program searches the database for any new records meeting the criteria you specify and adds them to the results.

For example, you can use a dynamic query to determine how many new constituents donated to the Literacy Fund at the end of each month. When you use the query to compile a list of constituents at the end of April, the program searches the database and compiles a list of all constituents who donated. Then, when you use the query to print the list at the end of July, the program again searches the database and compiles a list of constituents who donated to the fund. If new constituents donated in May, June, or July, they appear on the July report because the query added all new records meeting the criteria you defined.

Understand Query Criteria Operators

When you define a query, you establish a set of conditions each record must meet to be selected. You establish these requirements using the criteria fields. You can use criteria fields to make a global selection of records. For example, if you want to create a query of all constituents who donated $10 or more in cash gifts to your organization, you can use the criteria fields **Gift Type** and **Gift Amount** to "group" the constituent information. You use criteria operators in the criteria field to define more precisely the exact conditions a record must meet to be selected. In other words, criteria operators are additional filters you assign to the criteria fields you select. Using the example above, if you want to see only constituents who made a $10 or more cash donation to your organization, use a criteria operator to specify that the **Gift Type** "equals" Cash and the **Gift Amount** is "greater than or equal to**"** $10 for the record to be selected.

You can select from many different criteria operators to narrow your queries, but not all of them are appropriate for every field.

Equals. When you choose this operator, the records selected in your query must have the exact entry you define. For example, if you choose **Constituency Code** "equals" Board Member, only records with the exact entry of Board Member in the **Constituency Code** field are selected.

Does Not Equal. When you choose "does not equal" as your operator, the records selected for your query must not match the entry you define. For example, if you choose **Constituency Code** "does not equal" Board Member, the program selects every record that does not have Board Member entered as the constituent code.

Greater Than. If you select "greater than" as your operator, the records selected must have a value greater than the one you define. For example, if you select **Gift Amount** "greater than" $100, only records with gift amounts of more than $100 are selected.

Greater Than or Equal To. Selecting "greater than or equal to" as your operator limits the records selected to those with a value greater than or equal to the one you define. For example, if you select **Gift Amount** "greater than or equal to" $100, only records with a gift amount of $100 or more are selected. This operator includes the value you selected, in this case $100.

Less Than. When you select "less than" as your operator, you limit the records selected to those with an entry less than the value you define. For example, if you select **Gift Amount** "less than" $100, only records with a gift amount of $99.99 or less are selected. Records with a gift amount of $100 are not included.

Less Than or Equal To. When "less than or equal to" is selected as an operator, the records selected must have an entry less than or equal to the value you define. For example, if you select **Gift Amount** "less than or equal to" $100, only records with a gift amount of $100 or less are selected. This operator includes records with the value you selected, in this case $100.

Note: The asterisk (*) can be used as a wildcard character with certain query operators. For more information about wildcard characters, see "Understand Wildcard Characters" on page 26.

One Of. Choosing "one of" as the operator means that records selected must have at least one of the entries you define. The "one of" operator acts as an "or" between the entries you select. For example, if you select **Campaign Category** "one of" Annual, Capital, and Event, records selected must contain on of the campaigns chosen.

Not One Of. Choosing "not one of" as the operator means that records selected must not contain any of the entries you define. For example, if you select **Campaign Category** "not one of" Annual, Capital, and Event records selected must not contain any of the campaigns you defined.

Between. When you choose "between" as the operator, the records selected must fall within the range you define. This criteria operator is inclusive. For example, if you select **Gift Amount** "between" $100 and $300, records with gift amounts between $100 and $300 are included. Amounts equal to $100 and $300 are also included.

Not Between. If this operator is selected, the records included in your query must not fall within the range you specify. This operator is exclusive. For example, if you select **Gift Payment Amount** is "not between" $100 and $300, only records with gift payments of less than $100 and more than $300 are included. Gift payments between $100 and $300 are not included.

> **Note**: The "blank" operator is helpful if you want to maintain consistency in data entry or if you want to see which records have empty fields.

Blank. If you select "blank" as the operator, the records selected for your query must have a blank in the field you specify. For example, if you choose **Constituent ID** is "blank", the program selects records with an empty **Constituent ID** field.

Is Not Blank. When "is not blank" is selected as the operator, the selected records must have an entry in the field you specify. For example, if you select **Constituent ID** "is not blank", the program selects all records with an entry in the **Constituent ID** field.

> **Note**: Wildcard characters allow you to replace a character or a set of characters in a field. For more information about wildcard characters, refer to "Understand Wildcard Characters" on page 26.

Contains. Choosing "contains" as the operator selects records containing the defined value anywhere in the field. For example, if you select **Last Name** "contains" G, any records with the letter "G" anywhere in the **Last name** field are selected. You can use wildcard characters with this operator.

Does Not Contain. Choosing "does not contain" as the operator selects records that do not have the defined entry anywhere in the field you specify. For example, if you select **Last Name** "does not contain" G, only records without a "G" anywhere in the **Last name** field are selected. You can use wildcard characters with this operator.

Begins With. Selecting "begins with" as the operator means that records selected must have an entry beginning with the value you define. For example, if you choose **Last Name** "begins with" Bell, only constituents whose last name begin with "Bell" are selected (for example, Bell, Bellmont, or Bellingham). You can use wildcard characters with this operator.

Does Not Begin With. When you choose "does not begin with" as the operator, the records selected must not have an entry beginning with the value you define. For example, if you choose **Last Name** "does not begin with" Bell, only constituents whose last name does not have "Bell" at the beginning are selected. You can use wildcard characters with this operator.

Like. The "like" operator allows you to use wildcard characters to replace a character or a set of characters in a field. This operator and the wildcard characters are particularly useful when you are not sure of the spelling of a name or if you suspect something might be misspelled. For example, if you select **Last Name** "like" B?rd, the program selects all records with a similar spelling for example, Berd, Bird, or Byrd).

Not Like. The "not like" operator selects the records that are not spelled like the entry you define. You can use wildcard characters with this operator. For more information about wildcard characters, see "Understand Wildcard Characters" on page 26.

> **Note**: The "sounds like" operator is available only for text fields.

Sounds Like. The "sounds like" operator can be used when you want to select records based on a field for which you do not have the exact spelling. For example, you want to add a note about a conversation you had over the phone with a constituent who says their name is Smith. However, their name is actually spelled Smyth, which sounds like Smith. When you query, if you search for "sounds like" Smith, the program will find their record. You can also use wildcard characters with this operator.

Ask. The "ask" operator means Ask at Runtime. This operator lets you postpone the selection of specific values for your criteria fields (filters) until the time you actually run the query. For more information about the Ask at Runtime wizard, see "Understand the Ask Operator" on page 25.

Understand the Ask Operator

Note: The **Ask at Runtime** operator is not available for summary fields.

The Ask at Runtime operator lets you postpone the selection of specific values for your criteria fields (filters) until the time you actually run the query. For example, you may have a query you run on different dates that otherwise has identical criteria and output. As you create the query, you can select the appropriate date criteria fields and select the "<ask>" operator for that criteria field. When you run the query, an Ask at Runtime wizard appears, asking you to define the values for any fields with the "<ask>" criteria operator selected.
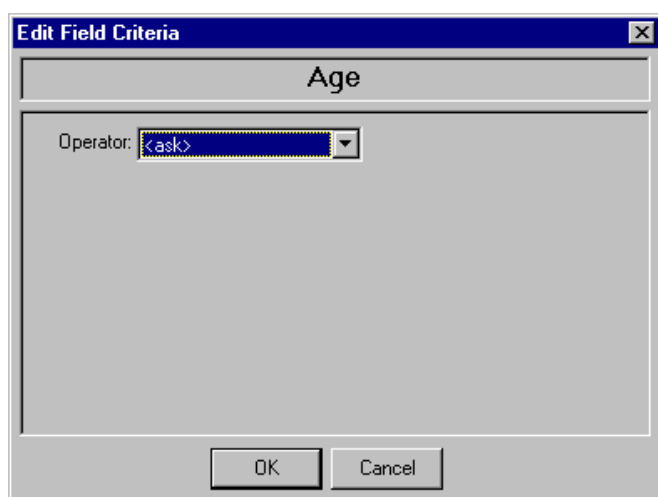
Note: The "is <any value>" criteria operator acts as a combination of the "not blank" and "blank" criteria operators. It functions as the "not blank" operator when it selects records with any value in the field you specify. It functions as the "blank" operator when it selects records with no value in the field you specify.

Once you select all your criteria fields and attempt to run the query, the wizard displays all criteria fields you selected with the "<ask>" operator. You can select any of the standard criteria operators defined earlier. The Ask at Runtime processing includes Field Criteria screens for every field you selected with the "<ask>" operator.

In addition to the criteria operators defined earlier, you can also select the "is <any value>" criteria operator, which is the default for the Ask at Runtime function. This criteria operator selects all possible entries for the filter field you selected. By using "is <any value>" you are telling the program you want all possible values for a field, including blanks. For example, if you select **Gift Type** with the criteria operator "is <any value>", the program selects all records with a value in that field.

In other words, you are selecting such gifts as Cash, Pledges, Gifts-in-Kind, and Stocks. You also select all records for which no value exists in the gift type field.
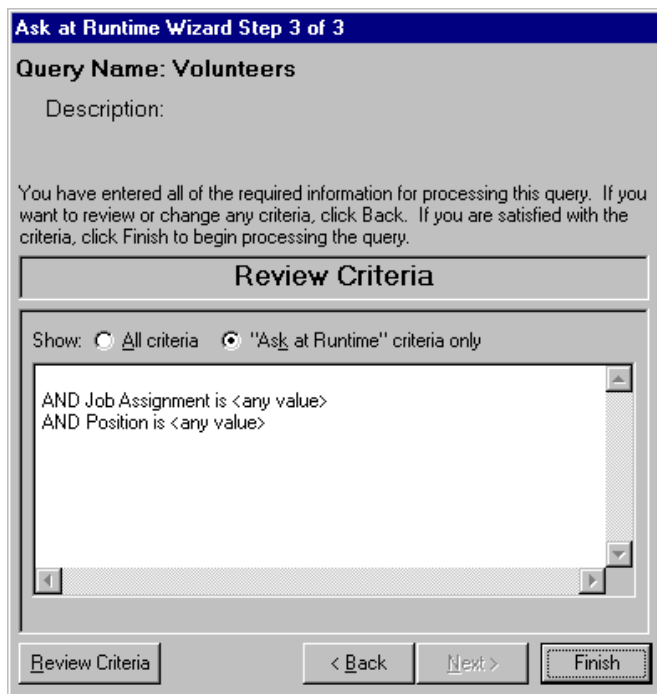
After the **Ask at Runtime** processing has concluded and before you view the query results, you can view all the other criteria set for this query by clicking the **Review Criteria** button. You can select to view all filtering criteria selected for the query or just the filtering criteria with the Ask at Runtime operator selected.

Understand Wildcard Characters

Note: Use wildcard characters with the following operators: "begins with", "does not begin with", "contains", "does not contain", "like", "not like", and "sounds like".

Some criteria operators allow you to use special characters or a series of characters to define conditions a record must meet in order to be selected. These special characters are called "wildcards". Wildcards are extremely helpful when you are not sure about the spelling of a name or when you suspect something may be misspelled. Below is a list of wildcard characters and examples of how they are used.

Question Mark (?). You can use the question mark symbol to replace a character. By typing a question mark within a word, you are asking the program to search for every possible spelling of the word with the question mark in that specific spot. More than one question mark is allowed within a word. For example, if you want to locate any constituent with a last name such as Smith or Smyth you can use the criteria **Last Name** "like" Sm?th. The program selects all constituents whose last name fits the pattern you described.

Asterisk (*). You can use the asterisk to replace a series of characters. For example, to locate all constituents with a last name ending with the letters "son", you can enter the criteria **Last Name** "like" *son. The program selects all constituents whose last name ends in son (for example, Simpson, Henderson, or Michaelson).

Note: You should only use brackets ([ ]) when searching for a single character. If you need a wildcard to replace a series of characters, use the asterisk (*).

Brackets ([ ]). You can use brackets to query for a range of characters or to locate several characters. For example, use the criteria **Last Name** "begins with" [A-C] to locate all constituent records with a last name beginning with A through C. When you use the brackets with a comma between characters, you are searching for records with the specific values listed. For example, if you select the criteria **Last Name** "begins with" [A,C,F], the program selects all constituent records with last names beginning with A, C, and F and skips those with last names beginning with B, D, and E.

Understand Combining Operators

Combining operators allow you to narrow your query even further by combining two separate sets of filtering criteria to make one. Combining operators are characters that provide a link between selected criteria and define the records included in the query.

And. You can use the **And** button between criteria fields to indicate that records must meet both criteria to be selected. For example, if you use the field criteria **Last Name** "equals" to Smith **And Constituency Code** "equals" to Board Member, the program locates all constituents whose last name is Smith AND who are board members. The records selected have to meet both criteria to be included in the query. The default combining operator used in a query record is And.

Or. You can use the **Or** button between fields to indicate records can meet either criteria to be selected. For example, if you use the field criteria **Last Name** "equals" to Smith **Or Constituency Code** "equals" to Board Member, the program locates all constituents whose last name is Smith OR constituents with a constituency code of board member.

Parentheses ( ). You can use the parentheses buttons to make two pieces of a criteria a whole. If you select the following criteria: **State** "equals" South Carolina **And** (**Constituency Code** "equals" Board Member **Or Gift Amount** "greater than or equal to" $1,000**)** the records selected must first have South Carolina as a value in the State field, and must have either a constituent code of Board Member or a gift amount of $1000 or more. In this case, records must meet the first criteria and at least one of the criteria within the parentheses.

Work with Basic Query Functions

Once you are familiar with the terms and concepts associated with *Query*, you are ready to begin creating queries. You can create, open, edit, delete, save, run, and send a query through electronic mail. You can also organize queries into categories, change a query's properties, and print a control report. The procedures detailed in this section provide the basic information needed to perform the more advanced querying tasks presented later in this chapter. In general, you can complete each task in many ways. The procedures section shows one way you can accomplish each described task.

Create a Query

The query process lets you group records based on criteria you define. Once you create a query, you can edit, delete, and print the results. You can also perform more advanced query functions like formatting the query results, merging two queries, or using an output query. The following procedures take you step-by-step through two of the ways in which you can create a query. The query types may differ, but the process for creating a query is basically the same for all query types. For more information about query types, refer to "Query Types" on page 20.

▶ **Create a constituent query**

A constituent query is based on the records found in the constituent record. Constituents are individuals or organizations in your database who have donated time, funds, or resources to your institution. Constituent queries give you access to all fields you find in other query types. Constituent records include information about gifts, relationships, actions, and addresses.

> *Scenario:* The development director of your organization asks you to create a list of all constituents who donated $10 or more to your organization's Annual or Capital Campaigns, between January and June of 2003. The list should be sorted in ascending alphabetical order and should list the names of the constituent and how much each donated. You may want to update this list next month.

Note: You can determine your default query type and query format in User Options. We recommend you select "Constituent" and "Dynamic" as your defaults. These are the most commonly used options. For more information about Query User Options, see "Query User Options" on page 13.

1. From the Query page, on the action bar, click **New Query**. The New Query screen appears. For more information about accessing a Query page, see "Navigate in Query" on page 5.

Warning: If you do not have rights to certain records in *The Raiser's Edge*, you do not see that query type in the **Query type** field. For example, if you do not have rights to gift records, you do not see the query type of Gift. For more information about Security, see the *Configuration & Security Guide*.

2. In the **Query type** field, select "Constituent" because you want to access information from both organization and individual records.

3. In the **Query format** field, select "Dynamic" because you want to make sure this list is refreshed each time you run it.

4. Click **OK**. The New Constituent Query record screen appears.
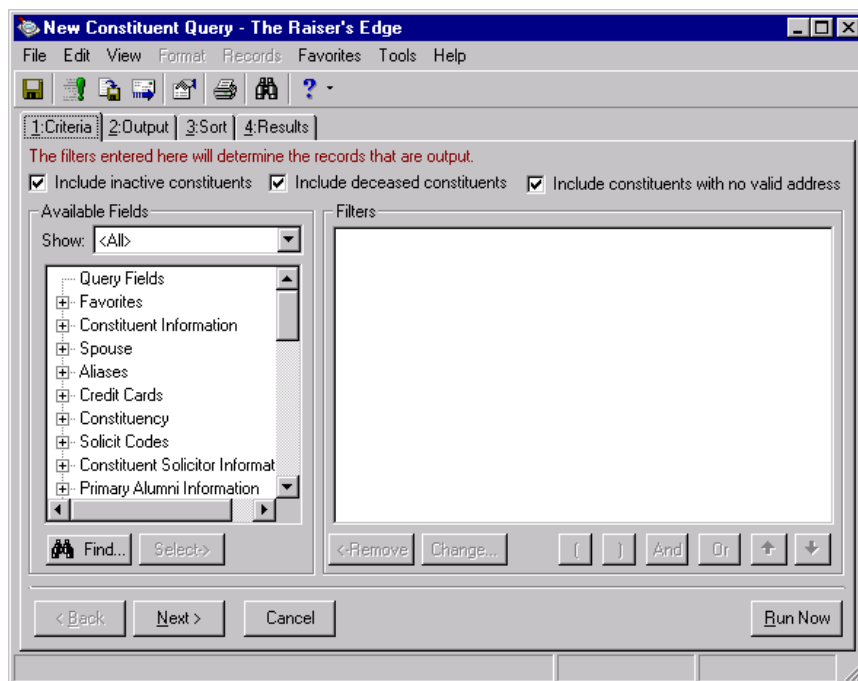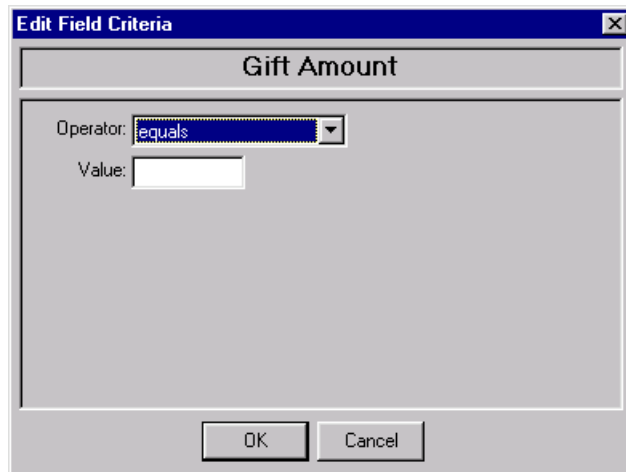
Note: You can add the criteria fields you use most often to your list of favorite fields. For more information about creating a list of favorite query fields, refer to "Customize Query and Use Favorites" on page 62.

5. Mark the **Include inactive constituents**, **Include deceased constituents**, or **Include constituents with no valid address** checkbox to indicate whether or not you want these constituents in your queries.

   You generally do not want to include inactive constituents, deceased constituents, or constituents with no valid address in your queries. However, checking any of these checkboxes gives you the ability to include them for historic purposes. For this procedure, leave the default marks in the checkboxes.

6. In the **Show** field, select "<All>". You can select a specific group of fields, or select "<All>" to see a complete list of Available Field categories.

7. Click the plus sign to the left of the group name to reveal criteria fields under each group. Click the Gifts group to reveal the **Gift Amount** and the **Gift Date** fields. Click the Gifts, Campaigns group to reveal the **Campaign Category** field.

Tip: You can use the **Find** button to easily locate a field in the Available Fields list.
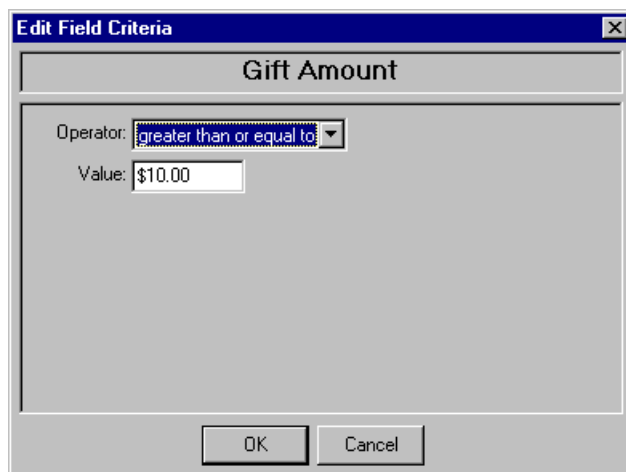
8. In the **Available Fields** box, highlight **Gift Amount** and click **Select**. The Edit Field Criteria screen appears.

Tip: You can also select a filter and access the Edit Field Criteria screen by highlighting the field and dragging it into the **Filters** frame, or by double-clicking on the field.

9. In the **Operator** field, select "greater than or equal to". For more information about criteria operators, refer to "Understand Query Criteria Operators" on page 23.

10. In the **Value** field, enter the amount $10.00. Because the field is already formatted for monetary amounts, you do not have to enter in the $, only the amount.

11. Click **OK**. The criteria field with the criteria operator appears in the **Filters** box.
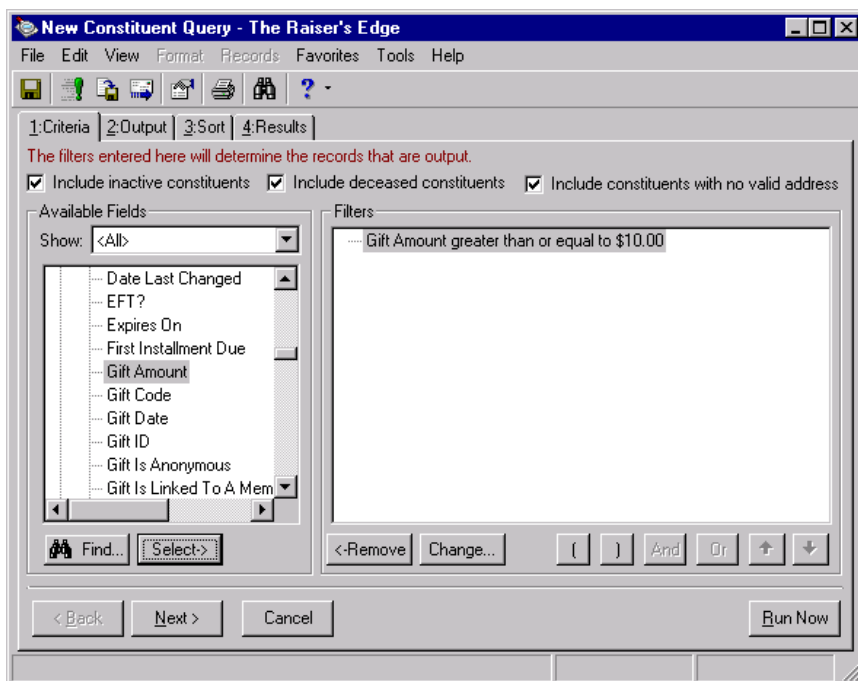
Note: You can install sample queries in *The Raiser's Edge*. Some of these queries save the time it takes to create them yourself. Others may serve as a starting point to get the specific results you are seeking. To access the Sample Installer, select **Tools**, **Install Samples** from the shell menu bar. For more information about installing samples for your database, see the Program Basics chapter in the *Program Basics Guide*.

12. In the **Available Fields** box, highlight **Gift Date** and click **Select**. The Edit Field Criteria screen appears.

13. In the **Operator** field, select "between".

14. In the **Value 1** field, enter the date 01/01/2003.
15. In the **Value 2** field, enter the date 06/30/2003.

16. Click **OK**.
17. In the **Available Fields** box, highlight the field **Campaign Category** and click **Select.** The Edit Field Criteria screen appears.

18. In the **Operator** field, select "one of". The **Campaign Categories** and the **Campaign Categories to** boxes appear.

19. In the **Campaign Categories** box on the left, click the, highlight "Annual" and "Capital" and click the single right arrow. The selected campaigns move to the **Campaign Categories to** box on the right side of the screen.
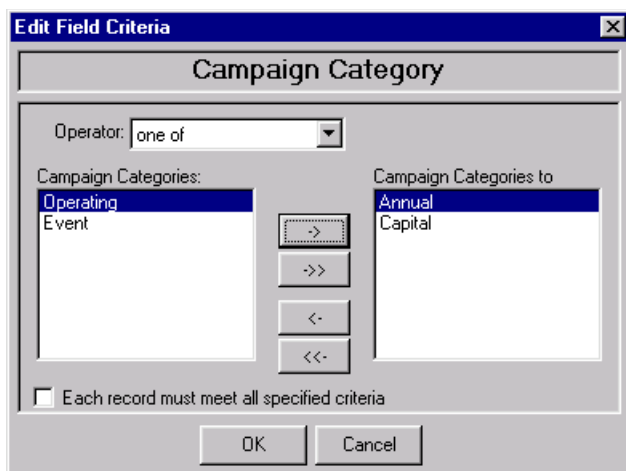
20. Click **OK**. You return to the Criteria tab of the New Constituent Query record screen. The criteria fields with the criteria operators appear in the **Filters** box.
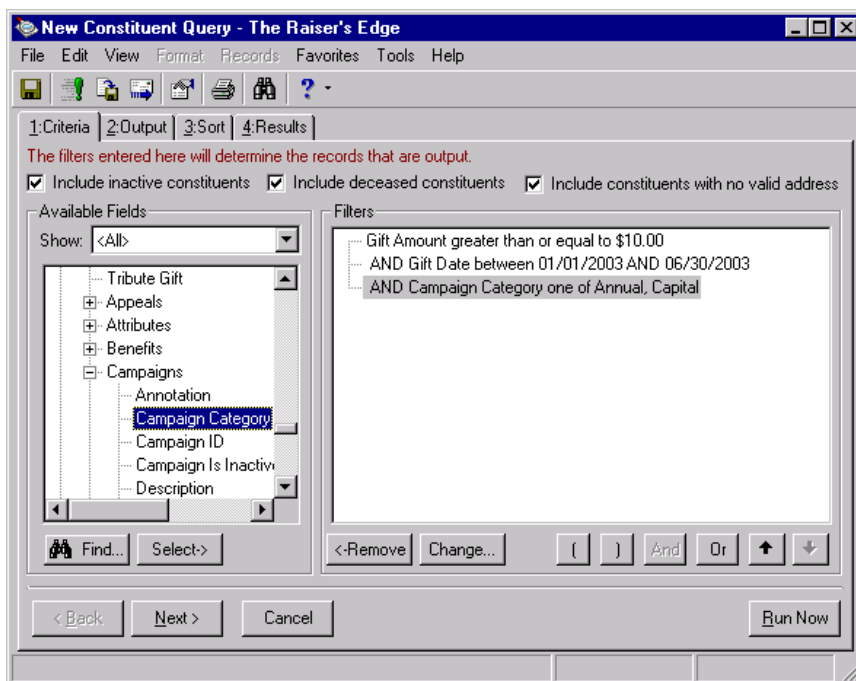
Tip: You can move from one tab to another by clicking the **Next** and **Back** buttons.

21. Select the Output tab. If you marked the **Automatically add criteria fields as output fields** checkbox in User Options, the fields you select on the Criteria tab automatically appear in the Output box of the Output tab. For more information about Query User Options, see "Query User Options" on page 13.
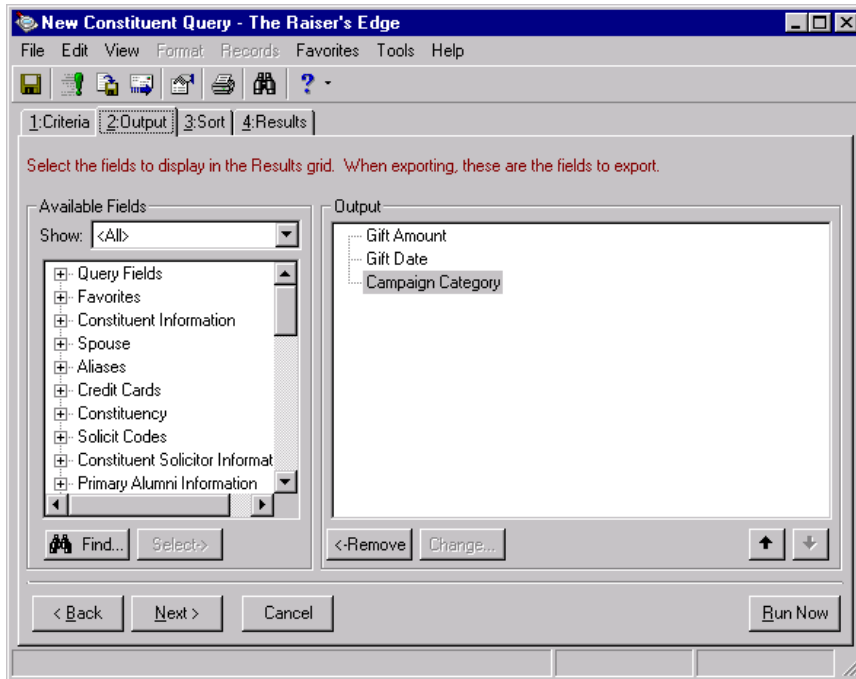
Tip: You can set your User Options to automatically include all criteria and sort fields on the Output tab. For more information, see "Query User Options" on page 13.

22. In the **Show** field, select "<All>". You can select a specific group of fields, or select "<All>" to see a complete list of Available Fields categories.

23. To reveal output fields under a category, click the plus sign to the left of the information category. In the **Available Fields** box, highlight the fields you want as an output field and click **Select**. Select **Name** under Constituent Information. The selected output field appears in the **Output** box.

Warning: We recommend you limit the number of output fields you select. Output fields increase processing time.

24. Using the up and down arrows, move **Name** to the top of the Output field list. You can use the up and down arrows to change the order of the Output fields, so the results appear in any order you like.
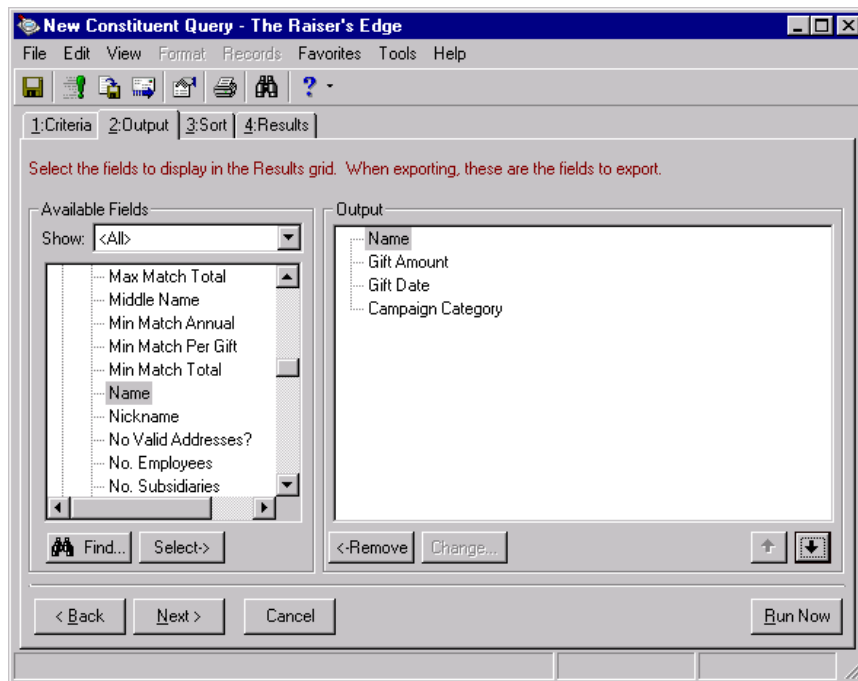
25. Select the Sort tab.
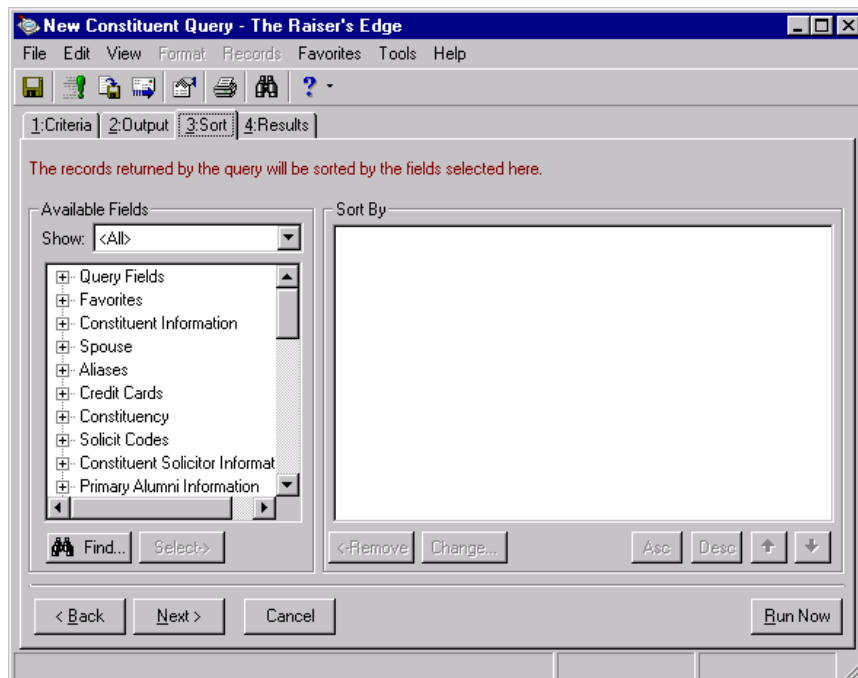
Note: If the field you want to sort by is already used in the query, you can select it by expanding the **Query Fields** category.

26. Click the plus sign by Constituent Information to expand the group. Highlight **Last Name**, and click **Select**. The selected sort field appears in the **Sort** frame with (Asc) as its default alphabetical sorting order.
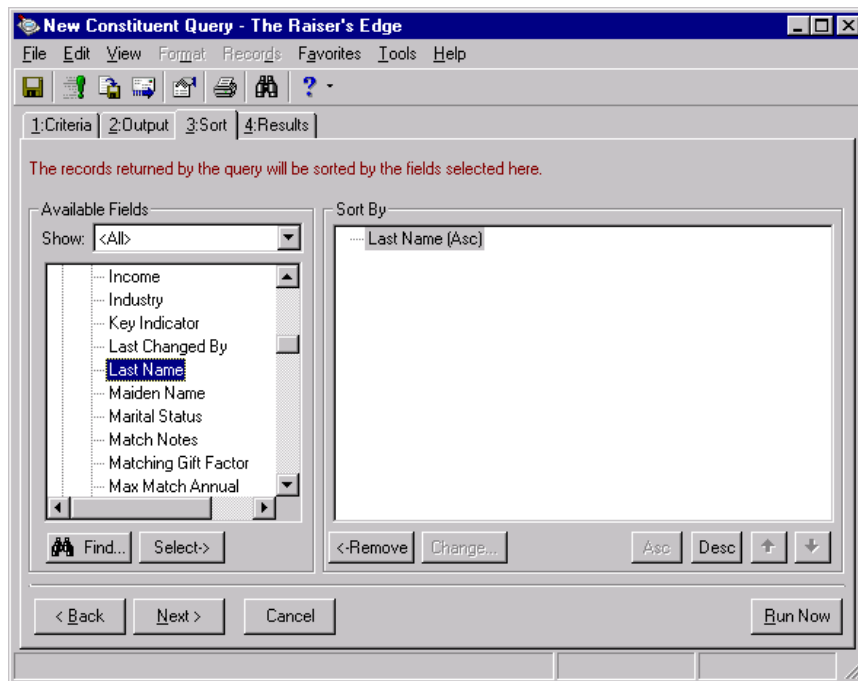
Note: After you assign your criteria, output, and sort fields you can click **Run Now** to view the query results.

27. Select the Results tab to view the results of your query.
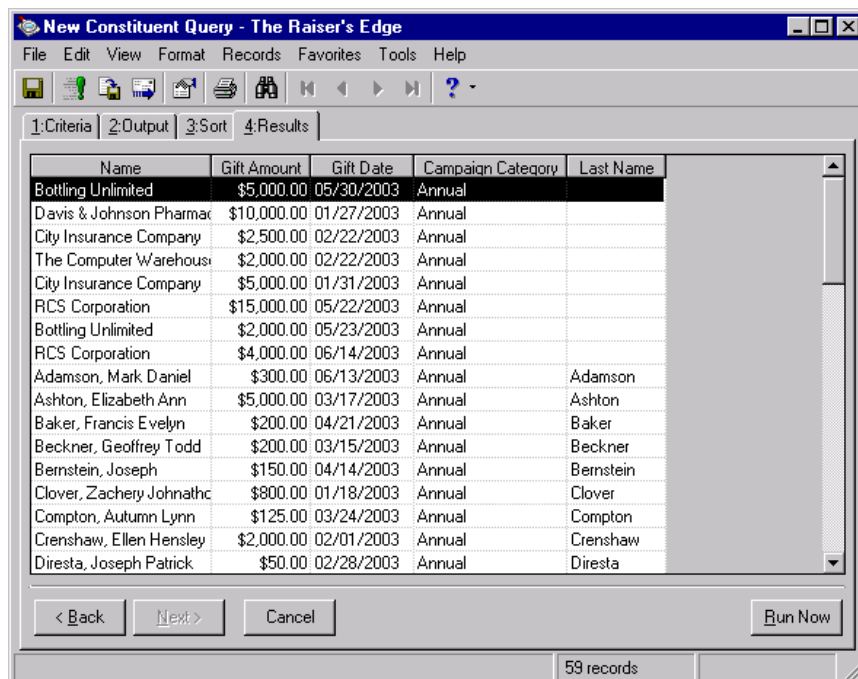
28. Because you only want to sort the results by **Last Name**, you do not need to view this column on the Results tab. From the menu bar, select **Format**, **Show Columns** to hide this column. For more information, see "Format query results" on page 101.
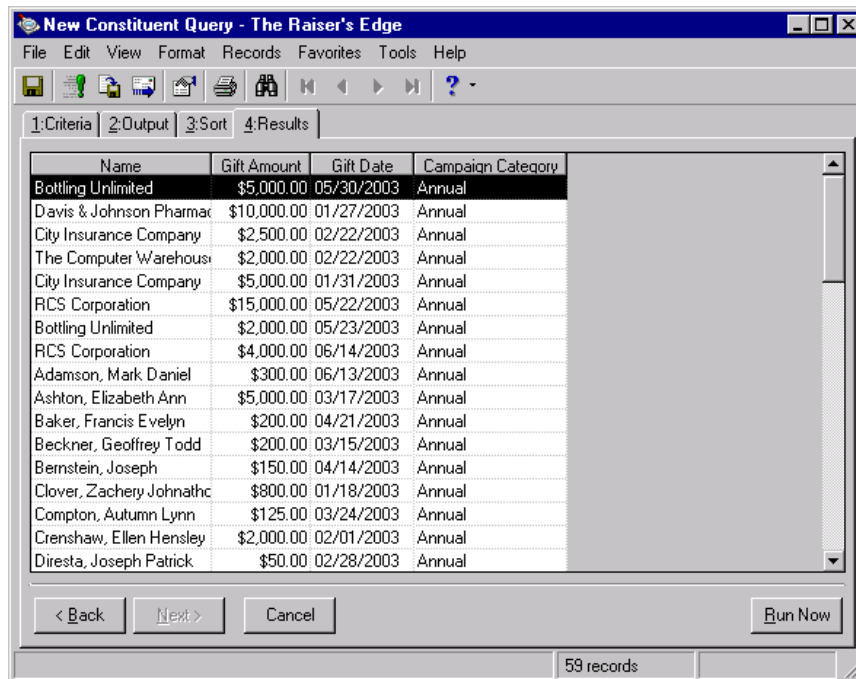
Tip: You can also save a query by selecting **File**, **Save** from the query record.
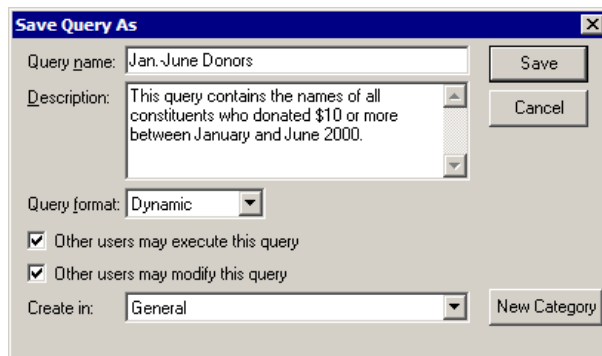
29. On the toolbar, click **Save**. The Save Query As screen appears.
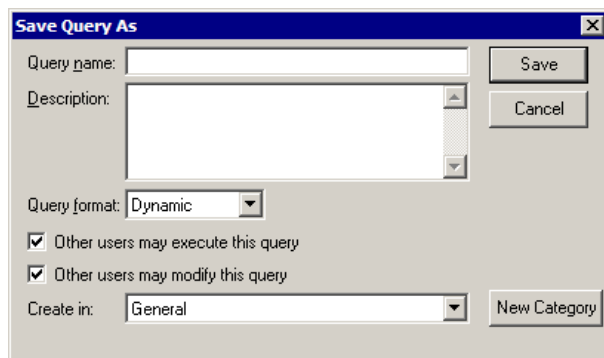
Note: We recommend you assign unique names and descriptions to your queries. This facilitates locating them if you use this function extensively.

30. In the **Query name** field, enter "Jan.- June Donors".

31. In the **Description** box, enter "This query contains the names of all constituents who donated $10 or more between January and June 2000."

32. To authorize other users to run your query, mark **Other users may execute this query**.

33. To authorize other users to change your query, mark **Other users may modify this query**.

34. In the **Create in** field, select the category to store the query. By default, "General" appears.

To create a new category for the query, click **New Category**. On the New Category screen, enter a name for the new category and click **OK**.

35. Click **Save**. The query is saved and appears in the grid on the Query page.
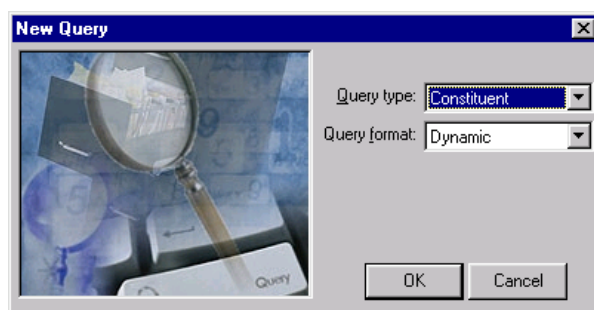
▶ **Create a relationship query using address processing**

Relationship queries are based on the relationship information found in the constituent record. Using the relationship query, you can retrieve information about a constituent's financial, personal, institutional and fundraising affiliations.

> *Scenario:* You are planning your organization's annual father-daughter dance and want to create a query to group all father-daughter pairs found in your database. On the Output tab, select address processing fields to prepare the invitations. To verify the results, print a list of all the constituents and their daughters in alphabetical order.

Warning: If you do not have rights to certain records in *The Raiser's Edge*, you do not see that query type in the **Query type** field. For example, if you do not have rights to gift records, you do not see the query type of Gift. For more information about Security, see the *Configuration & Security Guide*.

1. From the Query page, on the action bar click **New Query**. The New Query screen appears. For more information about accessing the Query page, see "Navigate in Query" on page 5.

Note: You can determine your default query type and query format in User Options. We recommend you select "Constituent" and "Dynamic" as your defaults. These are the most commonly used options. For more information about Query User Options, see "Query User Options" on page 13.

2. In the **Query type** field, select "Relationship".

3. In the **Query format** field, select "Dynamic".
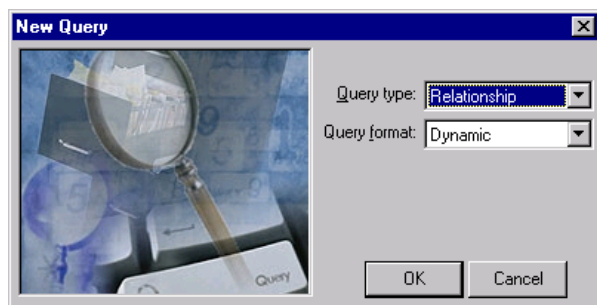
4. Click **OK**. The New Relationship Query record screen appears.
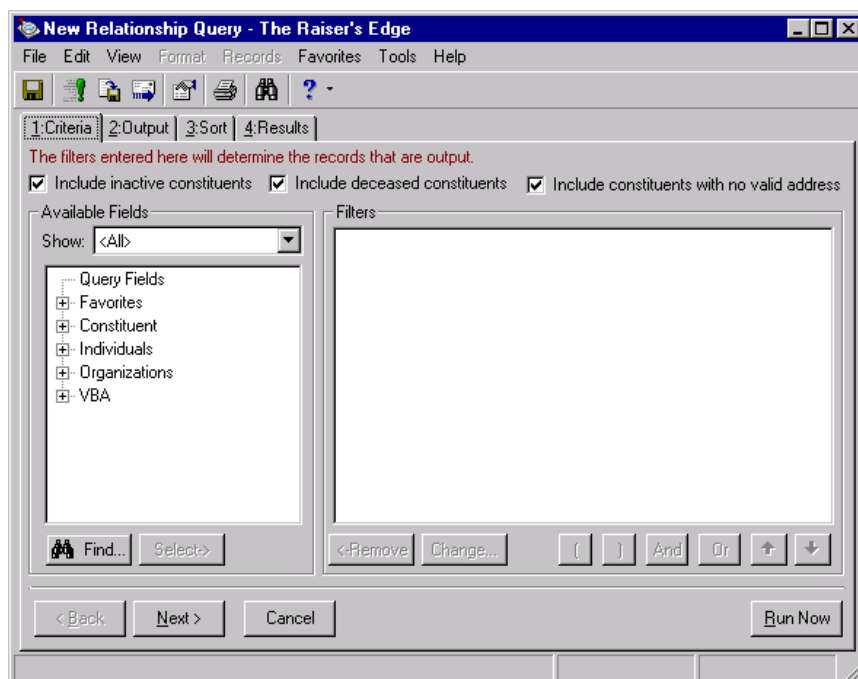
5. Mark the **Include inactive constituents**, **Include deceased constituents**, or **Include constituents with no valid address** checkbox to indicate whether or not you want these constituents in your queries.

   You generally do not want to include inactive constituents, deceased constituents, or constituents with no valid address in your queries. However, checking any of these checkboxes gives you the ability to include them for historic purposes. For this procedure, leave the default marks in the checkboxes.

6. In the **Show** field, select "<All>". You can select a specific group of fields, or select "<All>" to see a complete list of Available Fields categories.

Warning: You can use the **Find** button to easily locate a field in the **Available Fields** box.

7. Click the plus sign to the left of the category to reveal criteria fields under each category. Expand the Individuals category to reveal the **Relationship** and **Reciprocal** fields.

8. In the **Available Fields** box, highlight **Relationship** and click **Select**. The Edit Field Criteria screen appears.

Tip: You can also select a filter and access the Edit Field Criteria screen by highlighting the field and dragging it into the **Filters** frame, or by double-clicking on the field.
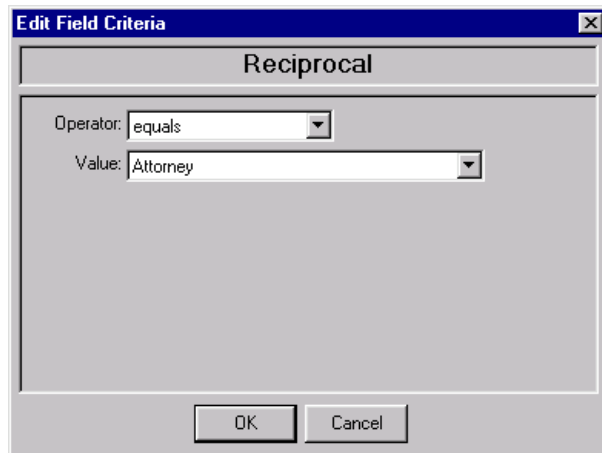
9. In the **Operator** field, select "equals" from the list of criteria operators. For more information about criteria operators, refer to "Understand Query Criteria Operators" on page 23.

10. In the **Value** field, select "Daughter" from the list of available options.
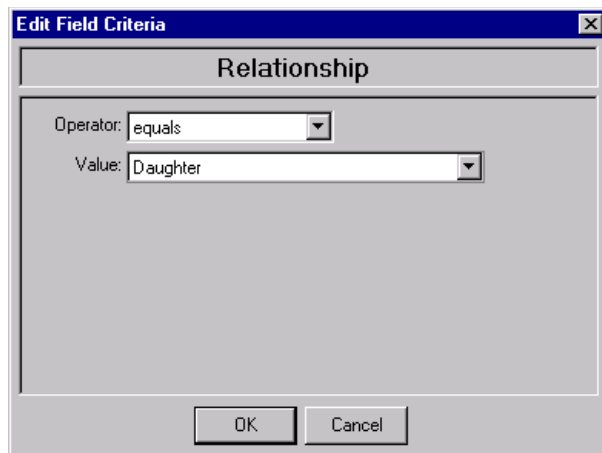
Note: The criteria fields selected for a query are stored in the **Query Fields** category of information. Accessing fields from this category reduces the time it takes to locate a field.
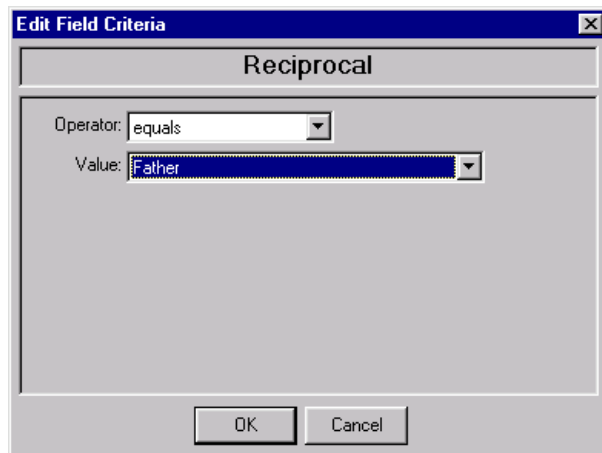
11. Click **OK**. The criteria field with the criteria operator appears in the **Filters** box.

12. Highlight **Reciprocal** and click **Select.** The Edit Field Criteria screen appears.

13. In the **Operator** field, select "equals".

14. In the **Value** field, select "Father".

15. Click **OK**. You return to the Criteria tab of the New Relationship Query record screen. The criteria fields with the criteria operators appear in the **Filters** box.
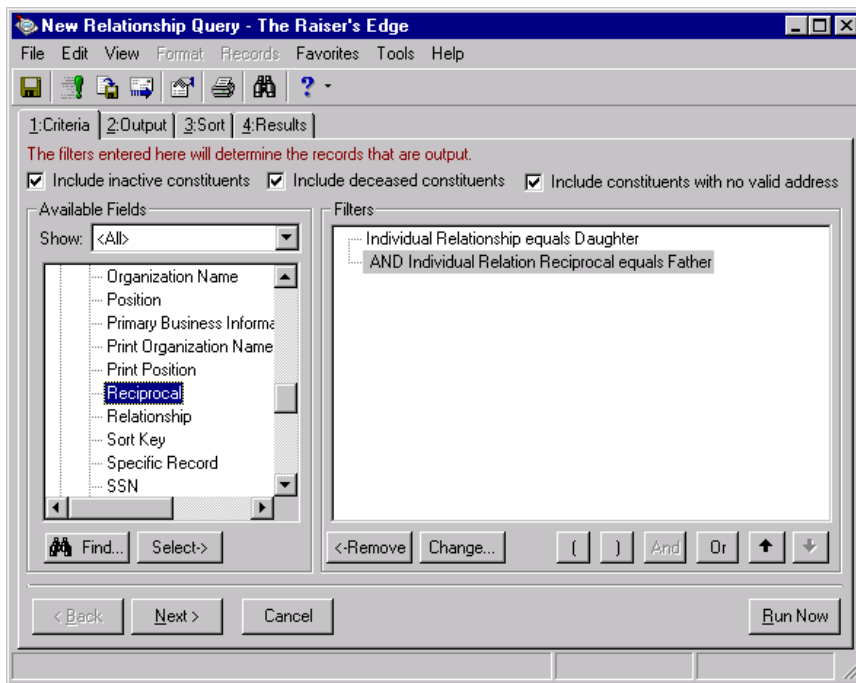
16. Select the Output tab. If you marked the **Automatically add criteria fields as output fields** checkbox in Advanced User Options, the fields you select on the Criteria tab automatically appear in the Output box of the Output tab. For more information about Query User Options, see "Query User Options" on page 13.
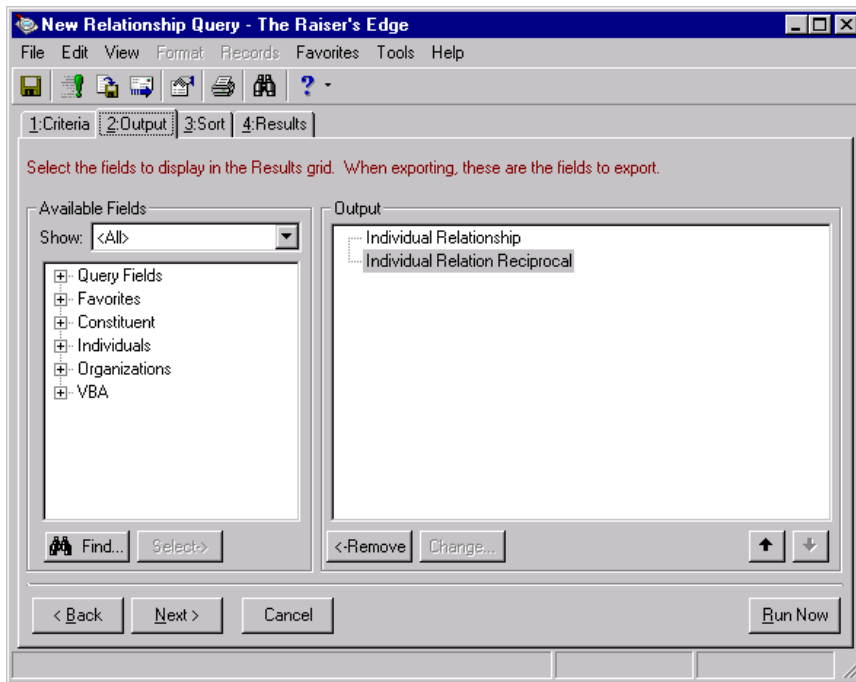
Tip: You can set your User Options to automatically include all criteria and sort fields in the output fields list. For more information about Query User Options, see "Query User Options" on page 13.

17. In the **Show** field, select "<All>". You can select a specific group of fields, or select "<All>" to see a complete list of Available Fields categories.

18. To reveal output fields under a category, click the plus sign to the left of the information category. In the **Available Fields** box, highlight the **Name** field under Constituent and click **Select.** The field appears in the **Output** box.

19. In the **Available Fields** box, highlight **Address Line 1** under Constituent, Addresses, Address Processing and click **Select**. The Address Processing screen appears.

Note: Address processing fields are also found in the query types of Constituent, Individual, Organization, Relationship, Action, Gift, Event and Participant (if you use the optional module *Event Management*), and Membership (if you use the optional module *Membership Management*).

20. In Step 1, mark the **Consider addresses with seasonal dates as of** checkbox if seasonal addresses should be considered as eligible addresses for the mailing. When you mark this checkbox, you need to select a date, such as Today, Yesterday, or <Specific date>, in the corresponding field. When you select <Specific date>, the **Date** field appears so you can enter a date, such as 06/30/2003.

    The program uses the date you enter to determine whether a seasonal address is valid. For example, if you mark the **Consider addresses with seasonal dates as of** checkbox, select <Specific date> in the corresponding field, and enter 12/01/2003 in the **Date** field, an address with **Seasonal from** date of 04/03 and a **Seasonal to** date of 07/03 is not selected for this mailing. If the program considers seasonal addresses, it selects the first valid seasonal address found. If a valid seasonal address is not found, the program uses your selections in Step 2.

Note: The program checks only the address types listed in the **Addresses to use** box. If you want the program to check all address types during address processing, move all available address types from the **Addresses** box to the **Addresses to use** box. To consider the Preferred address and then all other addresses after that, if the Preferred address is not valid, select First Address Found.

21. In Step 2, specify the addresses to consider when a valid seasonal address is not found in Step 1 or if you did not consider seasonal addresses for the mailing. To select an address, highlight the address in the **Addresses** box and click the right arrow to move it to the **Addresses to use** box. If you list multiple addresses in the **Addresses to use** box, you need to sort the addresses in order of their importance. To move an address within the **Addresses to use** box, highlight the address and click the up or down arrow.

For example, you can include the Preferred address and the Primary business address by highlighting them in the **Addresses** box and clicking the right arrow to move them to the **Addresses to use** box. If a constituent has both addresses in his record, you want to use the Preferred address. Because the program selects the address based on its position in the **Addresses to use** box, you need to use the arrows to move the Preferred address to the beginning of the list.

22. In Step 3, you can use attributes to choose the address type to print by clicking the **Address Attributes** button. When you click **Address Attributes**, the Address Attributes to Consider screen appears.

Note: An ellipsis appears at the end of the display if the attributes you selected do not fit in the area provided. You can hold your cursor over the attribute to view a tool tip displaying the entire attribute.

You can select an attribute category and description that, if present on an address, give it priority consideration to be used for the mailing. For example, if you want to include addresses with the attribute **Category** of NCOA Confirmed? and a **Description** of Yes, enter the information on this screen. For more information about entering address attributes, see the Constituent Mailing Information chapter of the *Constituent Data Entry Guide*. After entering the necessary address attributes, click **OK**. A display appears to the right of the **Address Attributes** button and lists the attributes you selected. When you do not specify any attributes, the label displays <No address attributes specified>.

23. In Step 4, select the address type the program should use if it cannot find an address meeting your selections in Steps 1 through 3. You can print the individual's name with no address, remove the record from printing in the mailing, or select a specific address to print. If you select a specific address to print, the **Address to print** field appears so you can select the address type to print on the mailing when no other valid address is found for the constituent. If no valid address has yet been found by this step in processing, the address type selected here prints regardless of selections made in previous steps.

24. Click **OK**. The **Address line 1** field appears in the **Output** box.

Note: For more information about the Address Processing screen, see the *Mail Guide*.

25. Repeat these steps to move **Address Line 2**, **City, State**, **and ZIP** (under Constituent, Addresses, Address Processing) from the **Available Fields** box to the **Output** box. The highlighted output fields appear in the **Output** box.

26. Using the up and down arrows, move **Name** to the top of the **Output** box. You can use the up and down arrows to change the order of the Output fields, so the results appear in any order you like.
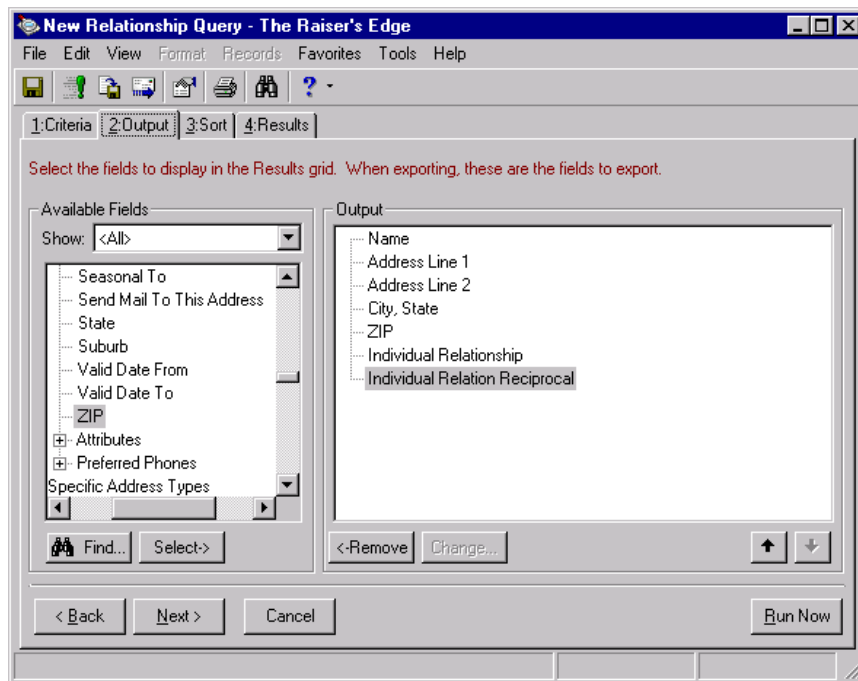
27. Select the Sort tab.
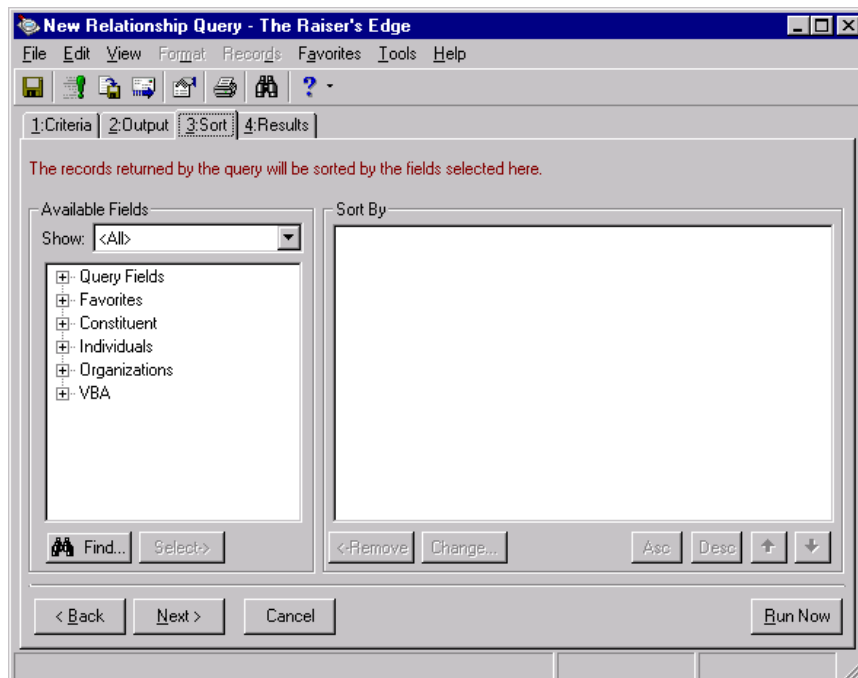
Note: If the field you want to sort by is already used in the query, you can select it by expanding the **Query Fields** category.

28. Expand the Constituent category by clicking the plus sign. Highlight the **Last Name** field and click **Select**. The selected sort field appears in the **Sort by** box with (Asc) as its default alphabetical sorting order.
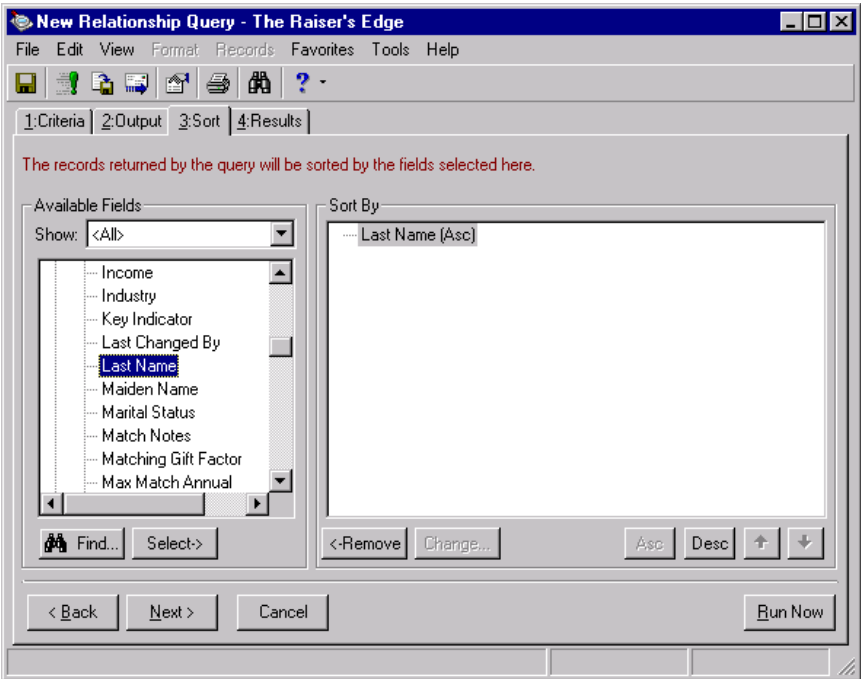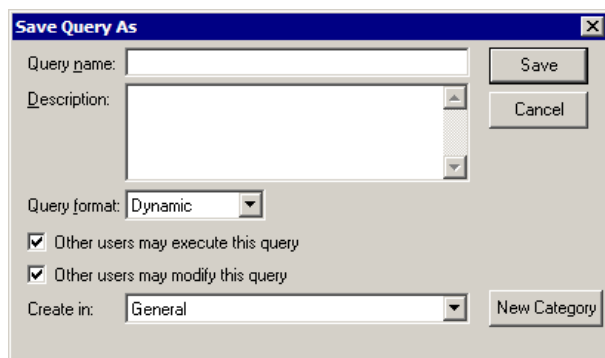
29. To view the results, select the Results tab.
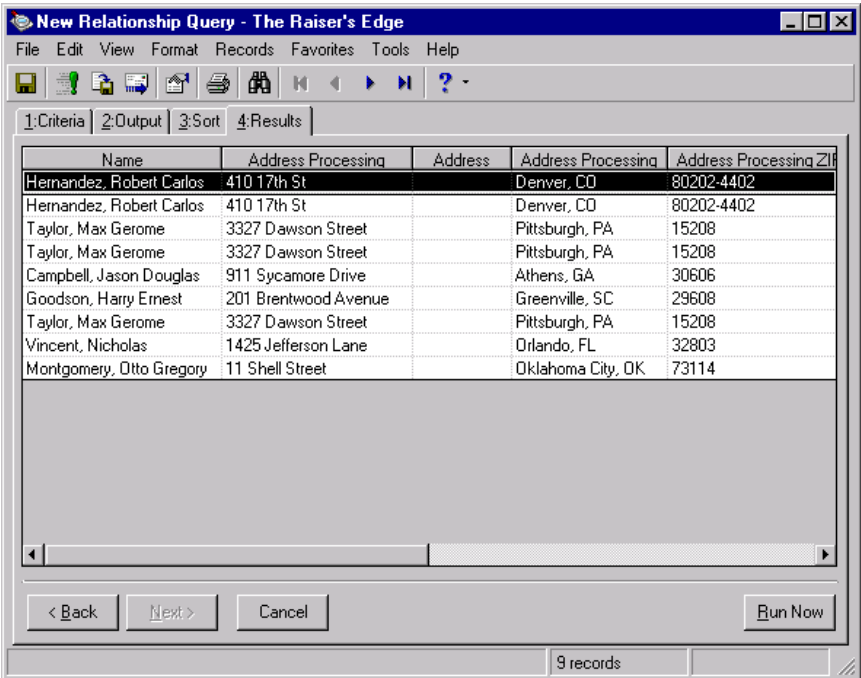
Tip: You can also save a query by clicking **Save** on the toolbar.

After you assign your criteria, output, and sort fields, you can also click the **Run Now** button on the action bar to view the query results.
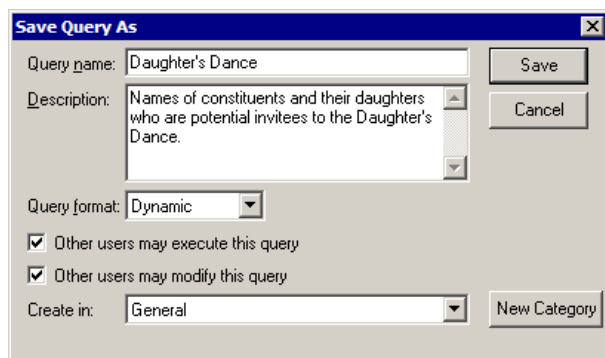
30. Select **File, Save** to save the query. The Save Query As screen appears.

31. In the **Query name** field, enter "Daughter's Dance".

32. In the **Description** field, enter "This query contains the names of all constituents and their daughters who are potential invitees to the Daughter's Dance."

33. To authorize other users to run your query, mark **Other users may execute this query**.

34. To authorize other users to change your query, mark **Other users may modify this query**.

35. In the **Create in** field, select the category to store the query. By default, "General" appears.

    To create a new category for the query, click **New Category**. On the New Category screen, enter a name for the new category and click **OK**.

36. Click **Save**. The query is saved and appears in the grid on the Query page.

Save a Query

Once you create your query and verify the query results are correct, you can save it and apply the filters you selected to any new records you enter into your database. If any new records meet the specifications defined in the example, they will be included in the query results the next time you run this query.

▶ **Save a query**

1. From the query record screen, click **Save** on the toolbar. The Save Query As screen appears. For more information about accessing the Query page, see "Navigate in Query" on page 5. For more information about creating a query, see "Create a constituent query" on page 28.

Note: We recommend you assign unique names and descriptions to your queries. This helps you locate them if you use this function extensively.

2. In the **Query name** field, enter a name for the query.

3. In the **Description** field, enter a description of what information the query contains.

4. In the **Query format** field, select the query format.

5. If you want to authorize other users to run your query, mark **Other users may execute this query**.

6. If you want to authorize other users to change your query, mark **Other users may modify this query**.

7. In the **Create in** field, select the category to store the query.

   To create a new category for the query:

   a. Click **New Category**. The New Category screen appears.

   b. In the **Name** field, enter the name of the new category.

   c. Click **OK**. You return to the Save Query As screen.

8. Click **Save**. The query is saved and appears in the grid on the Query page.
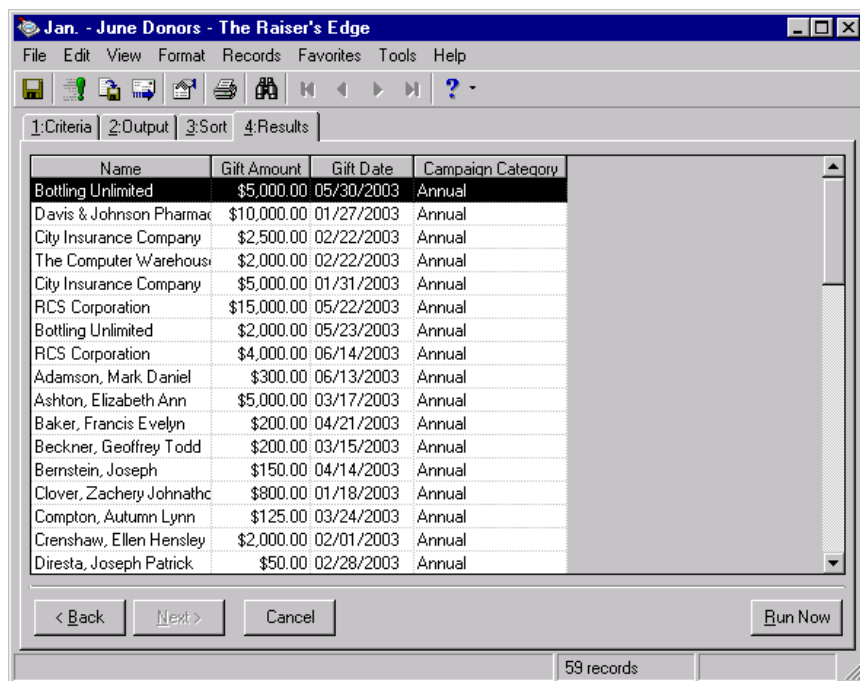
Review Query Results

Once you create a query, you can review the accuracy of the results by opening and reviewing the individual records listed in the results. This is extremely useful if you query a group of records to use in other applications like *Mail* or *Reports*. You can verify the query results and make sure you have the correct group for your mailing or to generate your report.

Note: Once you open one record in the Query Results grid, you can scroll through the entire group using the arrows on the toolbar.

▶ **Open individual records from a query**

1. From an existing query, select the Results tab. For more information about accessing the Query page, see "Navigate in Query" on page 5. For more information about creating a query, see "Create a constituent query" on page 28.

Note: If you want to hide a column on the Results tab, select **Format**, **Show Columns** on the menu bar. For more information, see "Format query results" on page 101.

2. Highlight the specific record you want to verify and right-click. The right-click menu appears.
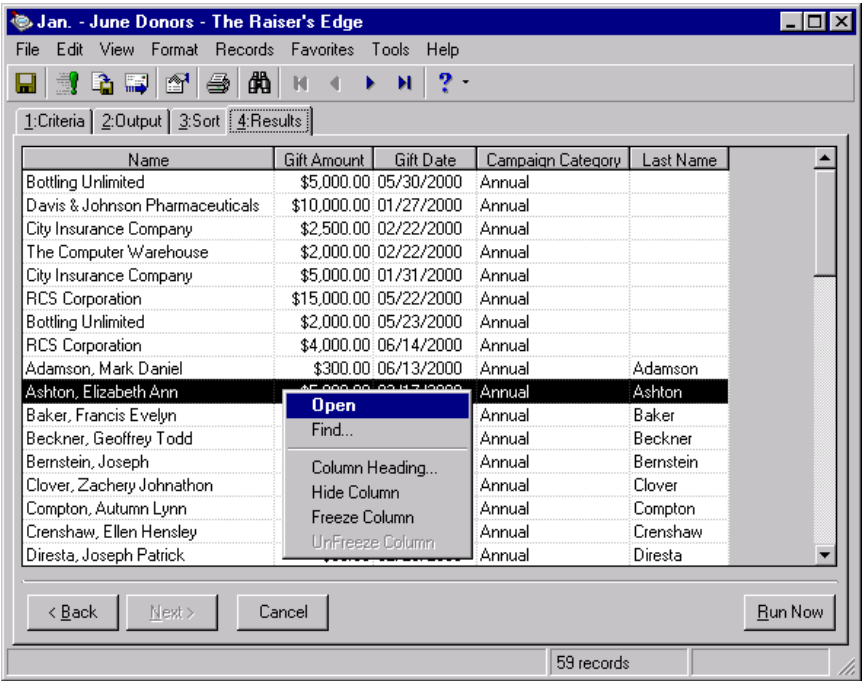
3. From the right-click menu, select **Open**. The selected record appears.
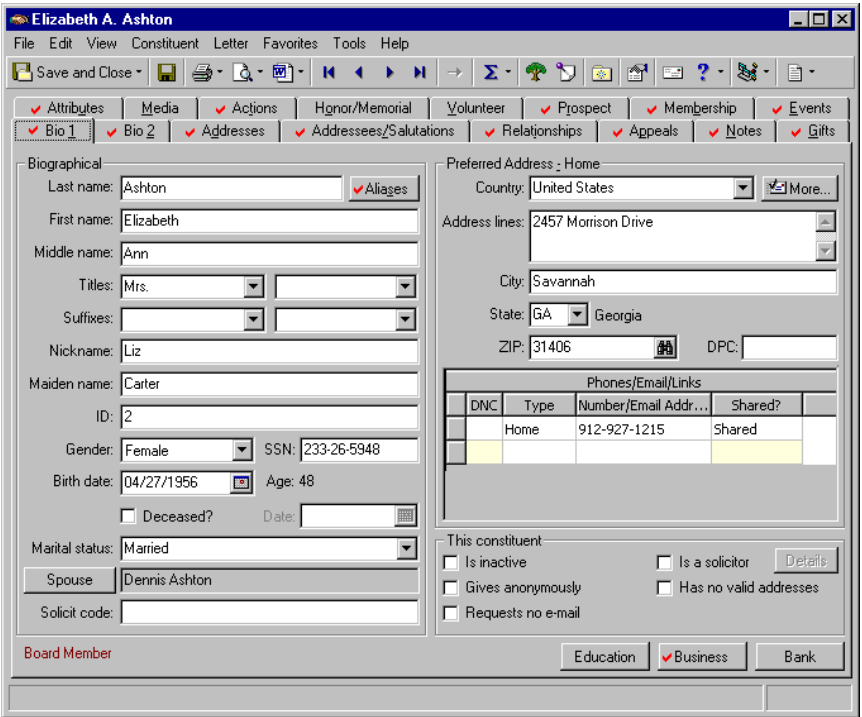
4. Click **Save and Close** to return to the query Results tab.

Edit a Query

You can change a query's filtering criteria and formatting options at any time. This may be necessary if you need to include additional output fields in an existing query or if you want to change the values or the criteria operators assigned to certain criteria fields.

▸ **Edit a query**

> ***Scenario:*** You already created, saved, and closed the query of all constituents who donated $10 or more to the Annual Campaign, but you realize that it would be useful to include as one of the output fields the name of the appeal to which they responded and the gift type you received. You notice the date on the query results has different formatting than the one you prefer. You also want to include in the query constituents who donated in December. This scenario uses the query Jan.- June Donors added in "Create a constituent query" on page 28 of this chapter.
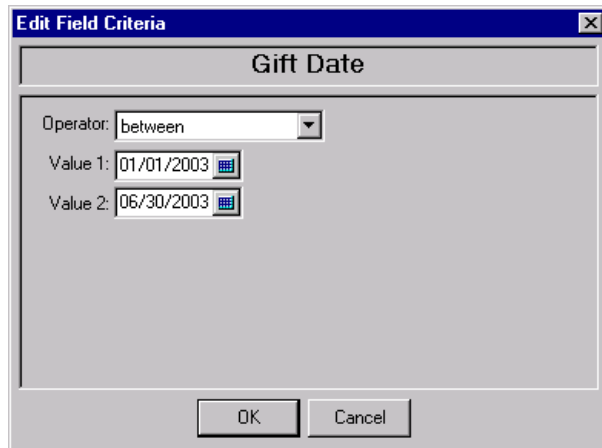
Tip: From the Query page you can open a query by highlighting it and double-clicking, by using **Open,** or by selecting **File, Open** from the menu bar.

1. From the Jan.- June Donors query record, select the Criteria tab. For more information about opening a query, see "Open a query record" on page 9.
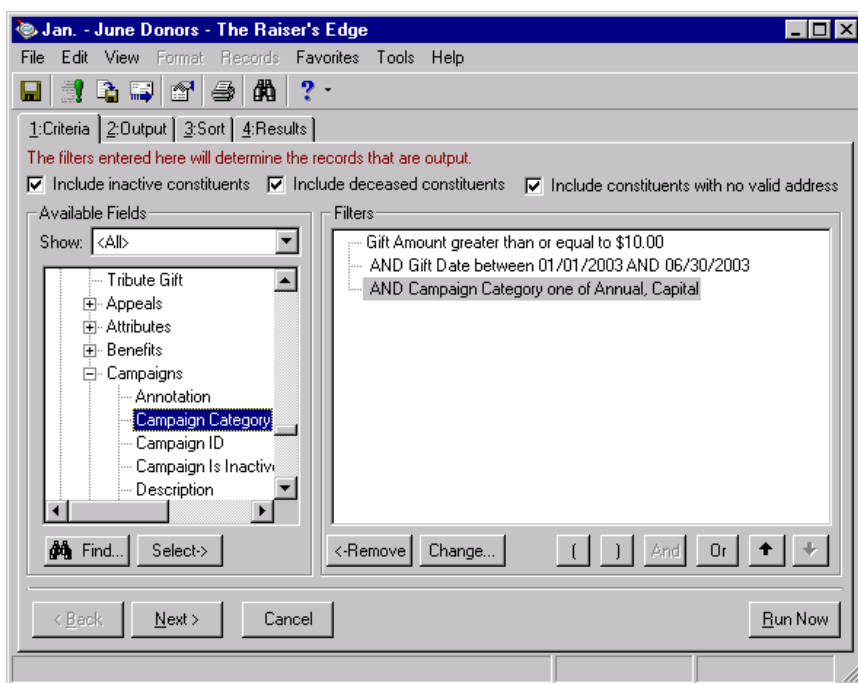
Note: The **Change** button is enabled only on the Criteria tab. You cannot use it to edit information on the Output or Sort tabs.

2. To modify the **Gift Date** field to include donations made in December, highlight the **Gift Date** field on the **Available Filters** box of the Criteria tab. Click **Change**. The Edit Field Criteria screen appears.

3. Change the dates to include donations made in December. Change the date in the **Value 1** field to 12/01/2002. The **Value 2** field date remains 06/30/2003.

4. Click **OK**. You return to the Jan.- June Donors query screen.
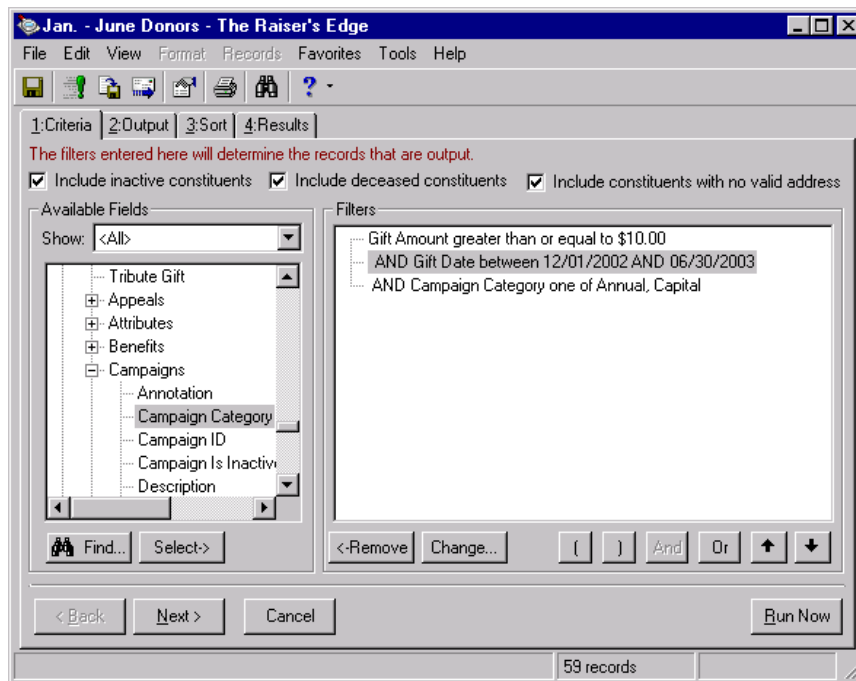
5. Select the Output tab.
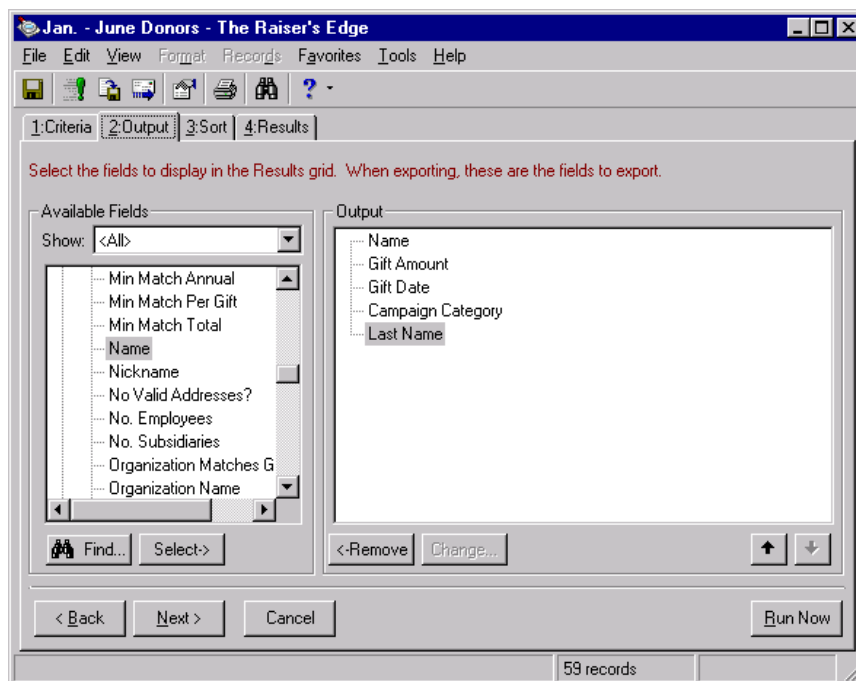
6. From the Available Fields box, click the plus sign beside Appeals to expand the tree view. Highlight **Description** and click **Select**. **Description** moves to the **Output** box.

7. From the **Available Fields** box, click the plus sign beside Gifts to expand the tree view. Highlight **Gift Type** and click **Select**. **Gift Type** moves to the **Output** box.
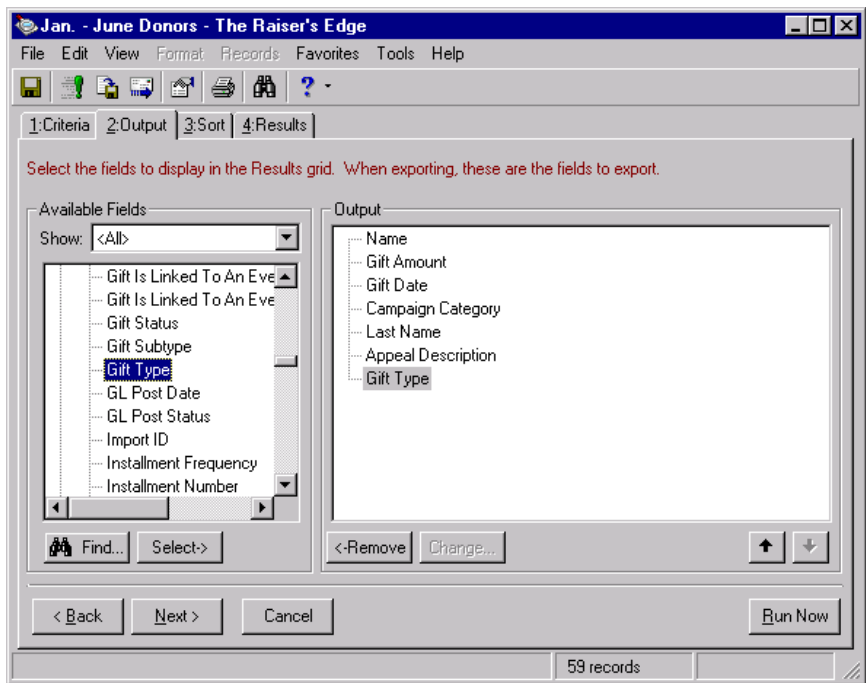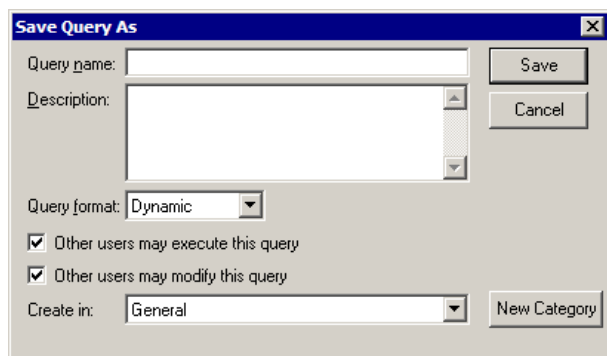
Note: If you want to hide a column on the Results tab, select **Format**, **Show Columns** on the menu bar. For more information, see "Format query results" on page 101.

8. Select the Results tab to ensure you gathered the appropriate information in your query.
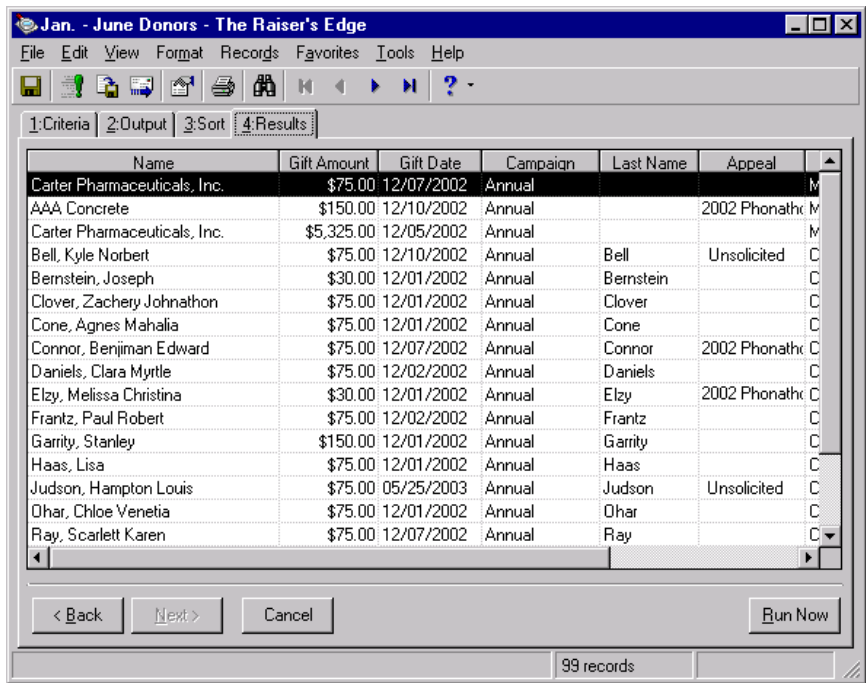
Note: To replace the original query with the one you just edited, click **Save** on the toolbar.
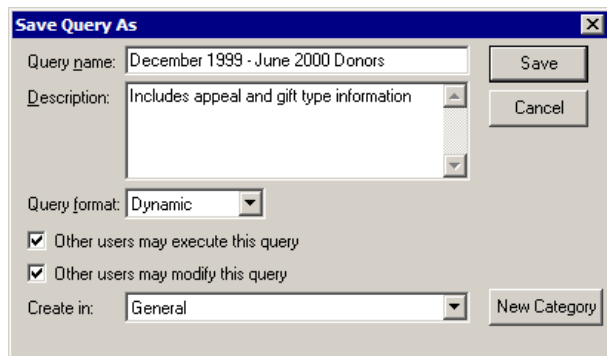
9. Because you want to keep the original query and create a new query based on the edits you just made, select **File, Save As** from the menu bar. The Save Query As screen appears.

10. In the **Query name** field, enter "December 1999 - June 2000 Donors".

11. In the **Description** field, enter "Includes appeal and gift type information".

12. To authorize other users to run your query, mark **Other users may execute this query**.

13. To authorize other users to change your query, mark **Other users may modify this query**.

14. In the **Create in** field, select the category to store the query. By default, "General" appears.

    To create a new category for the query, click **New Category**. On the New Category screen, enter a name for the new category and click **OK**.

15. Click **Save**. The query is saved and appears in the grid on the Query page.

Run a Query

From the Query page, you can run a dynamic or static query without opening it. If you saved a query and want to view the query results, you can run and view the results automatically. If you selected the "<ask>" query operator for any criteria fields, the Ask at Runtime wizard appears before you can view the results.

▶ **Run a query**

    1. From the Query page, highlight the query you want to run. For more information about accessing the Query page, see "Navigate in Query" on page 5.
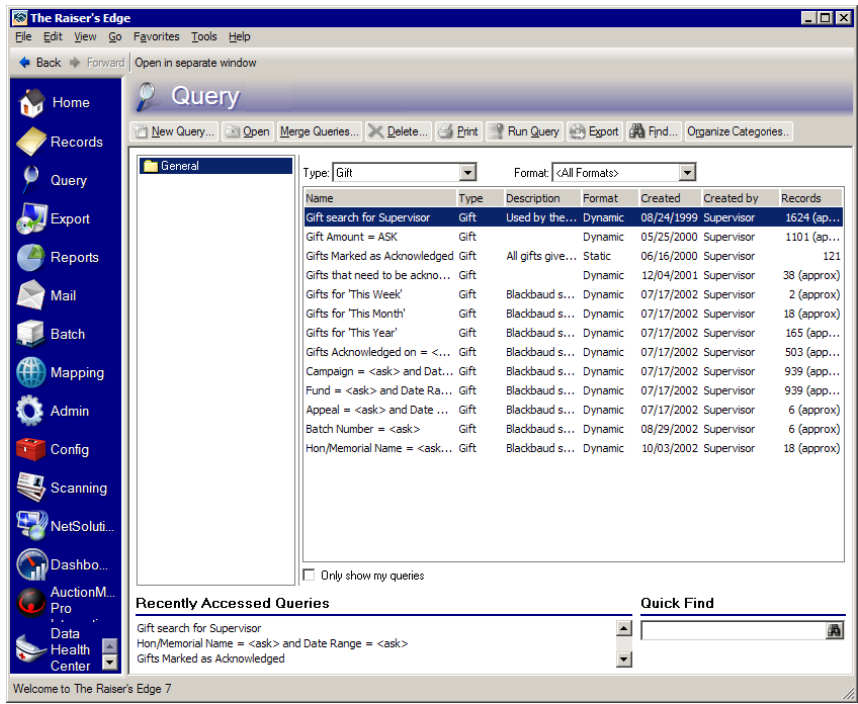
Tip: From an open query record click **Run Now** or select the Results tab to run the query.

    2. On the action bar, click **Run**. The query runs and the Results tab of the query appears.
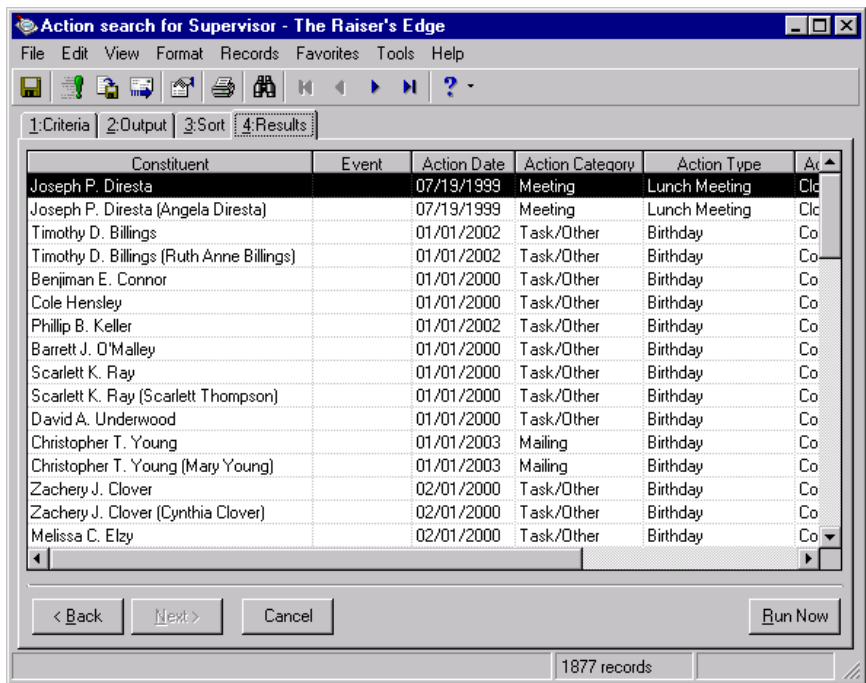
    3. From the menu bar, select **File**, **Close** to close the query record.

Delete a Query

At any time, you can delete a query you created. We recommend you make a backup copy of your database before deleting any information. We also suggest you print a control report of any query you decide to delete. The control report lists all filtering criteria used and the output and sort fields selected. This can be extremely helpful if you decide to create the query again or if you need to maintain a record for historic purposes. For more information about printing a control report, refer to the next section about printing query records.

▶ **Delete a query**

Note: You can also delete queries from the Query page. In the grid, highlight the query you want to delete and click **Delete** on the action bar.

1. From a query record, select **File, Delete** the menu bar. A warning message appears, asking if you are sure you want to delete the query. For more information about opening a query, see "Open a query record" on page 9.
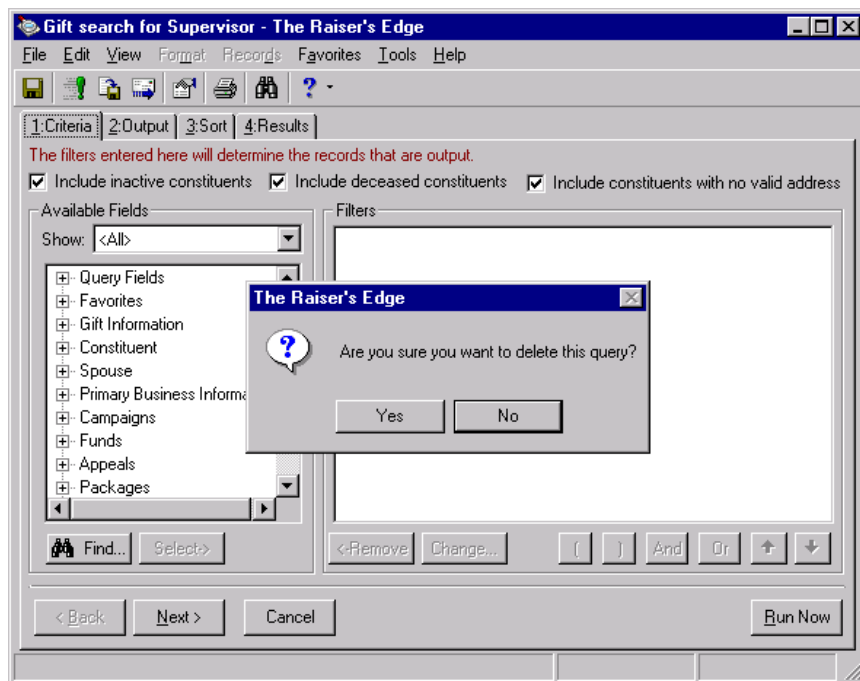
Warning: A warning message appears if the query you want to delete is used as part of a merge, as a source for another query, or if the query is associated with a business rule or action track. If this is the case with the latter two, the query cannot be deleted.

2. To delete the query, click **Yes**. You return to the Query page.

Print Query Records

For each query you create, you can print the query results or a control report. Query results are simply a list of all records meeting the criteria you specified. Query results display a grid with all the output fields you selected for the query. When you select to print query results, you are selecting to print an exact replica of what is displayed on the Results tab of the query. The control report lists all criteria fields, criteria operators, sort fields, and output fields used to define the conditions records must meet to be selected.

▶   **Print a query control report**

The control report lists all criteria fields, criteria operators, sort fields, and output fields used to define the conditions the records must meet to be selected. Printing a control report is useful if you plan to delete the query, but want to maintain a record of the fields used to create it. The control report also contains details about a query, including the name, description, type, format, the date the query was created and last run, the number of records, the access rights, the filter fields, the sort, and the output fields.

> ***Scenario:*** One of your co-workers wants to duplicate the Daughter's Dance constituent query you created earlier and needs a list of the filters, sort fields, and output fields you used to create the query. This scenario uses the Daughter's Dance query created in "Create a relationship query using address processing" on page 38 of this chapter.

1. On the Query page, highlight the query for which you want to print a control report. For this example, highlight the Daughter's Dance query. For more information about accessing the Query page, see "Navigate in Query" on page 5. For more information about opening a query, see "Open a query record" on page 9.

Note: You can also access the control report by selecting **File**, **Properties** from the menu bar of the query record, or by clicking the **Properties** on the toolbar.

2. From the menu bar, select **File**, **Properties**. The Properties screen appears, which lists details of your query.
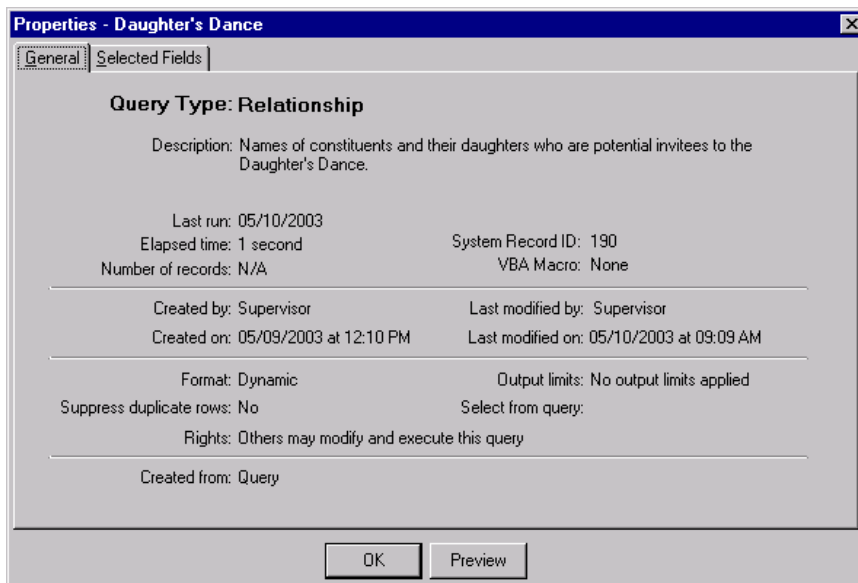
3. From either the General tab or the Selected Fields tab, click **Preview**. A preview of the control report displays on the screen.
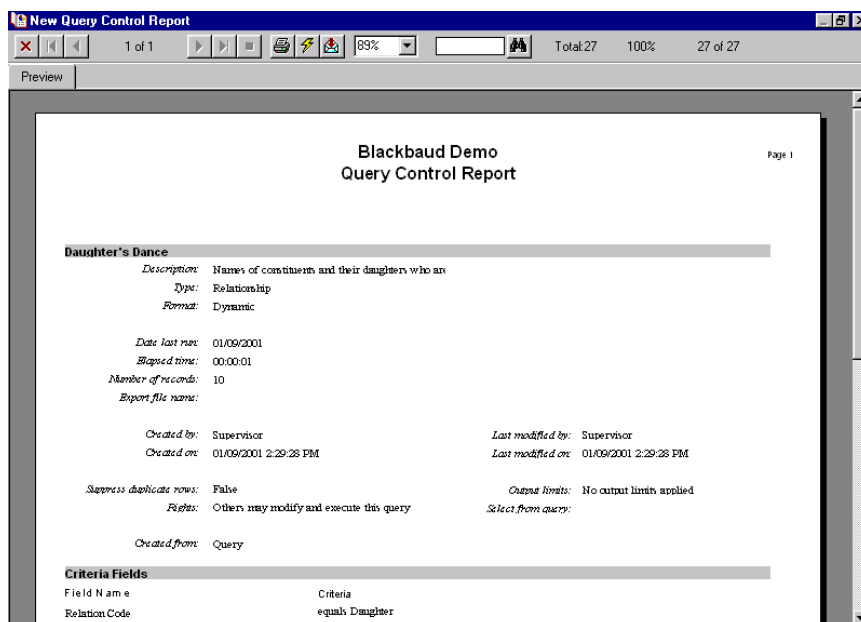
4. Click **Print** on the toolbar to print the report.

5. To close the Preview screen, click the red "X" in the top left corner of the screen. You return to the Properties screen.

6. To close the Properties screen, click **OK**. You return to the Query page.

Refresh a Static Query

One way of understanding a static query is to think of the query as a snapshot of your database. When you create a static query, only the records selected at the time the query was originally designed and run are included when the query is used in the future. For example, you may create a static query of all constituents who made a donation in December to your organization's Annual Fund. In February, you use that query to print a report of all constituents who donated to the Annual Fund. Only the records that existed in the system in December and were selected when the query was created are included. To include the records of the constituents who donated since December, you must refresh the query. If you create a static query and rerun it at a later time using the **Run Query** button, you will update the query to include any new records that meet the specified criteria.

For information about refreshing a static merged query, see "Refresh a Merged Query" on page 95.

▶ **Update a static query**

Tip: You can also click **Refresh** to refresh a query from the Query page, but you will still have to open the query to view the refreshed results.

1. From the Query page, highlight a static query you want to refresh. For more information about accessing the Query page, see "Navigate in Query" on page 5. For more information about opening a query, see "Open a query record" on page 9.
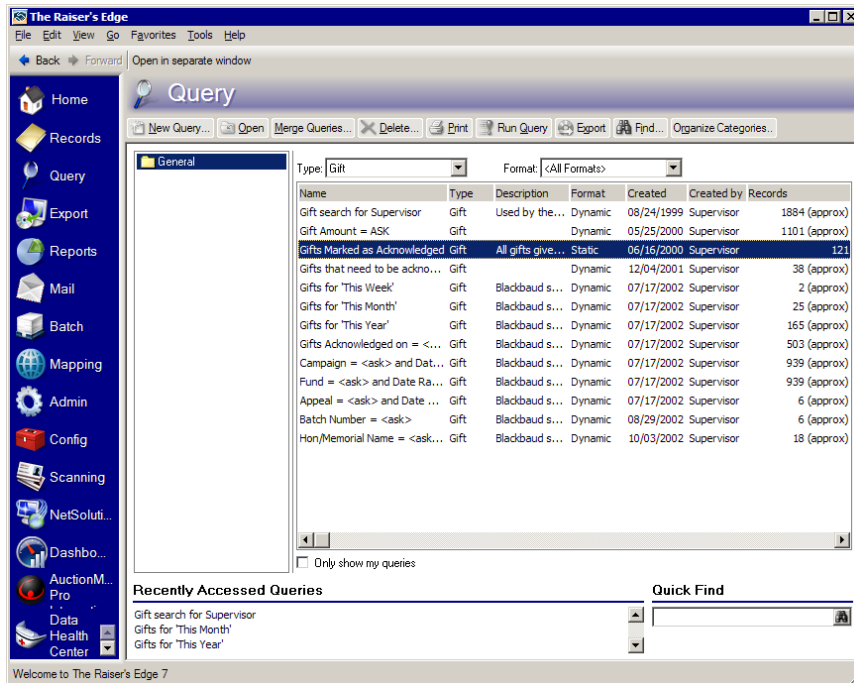
2. On the action bar, click **Open**. The query record screen appears.
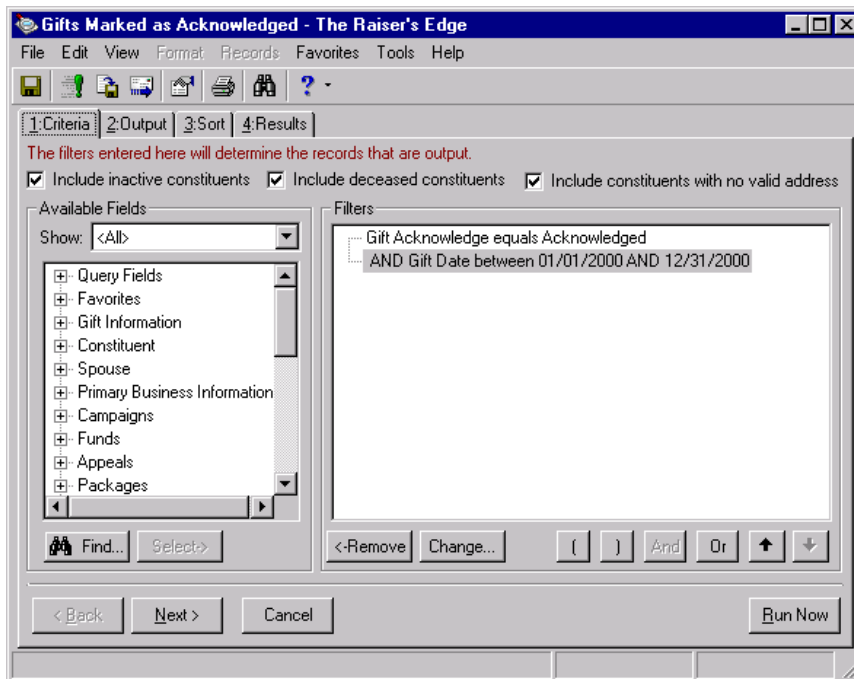
3. If you want to change any of the filtering criteria you used in this query, select the Criteria, Output, and Sort tabs and make your changes.

Note: The **Records** menu option is available only from the Results tab of a query.

4. Select the Results tab or click **Run Now** on the toolbar to process the query results.

5. From the menu bar, select **Records**, **Refresh**.

   The updated results in a static query save when you click **Save** on the toolbar or select **Records**, **Refresh** from the menu bar. If you select the Results tab or click **Run Query** on the toolbar, the static query updates, but the changes are not automatically saved.

6. A confirmation message appears. The program searches the database for any new records meeting the criteria you defined and adds them to the query results.
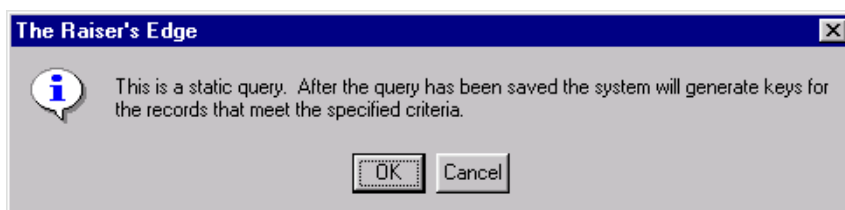
Note: Keys in a static query are equivalent to the number of records in a static query. This number is also visible at the bottom of the Results tab.

7. Click **OK**.

8. When the program is finished counting keys, or records in the query, another message appears telling you how many records the static query contains.
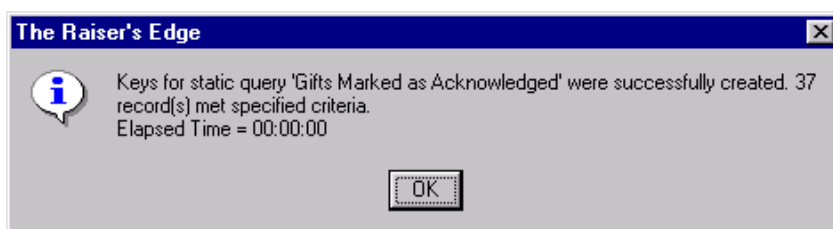
9. Click **OK**. You return to the Results tab of the query record.
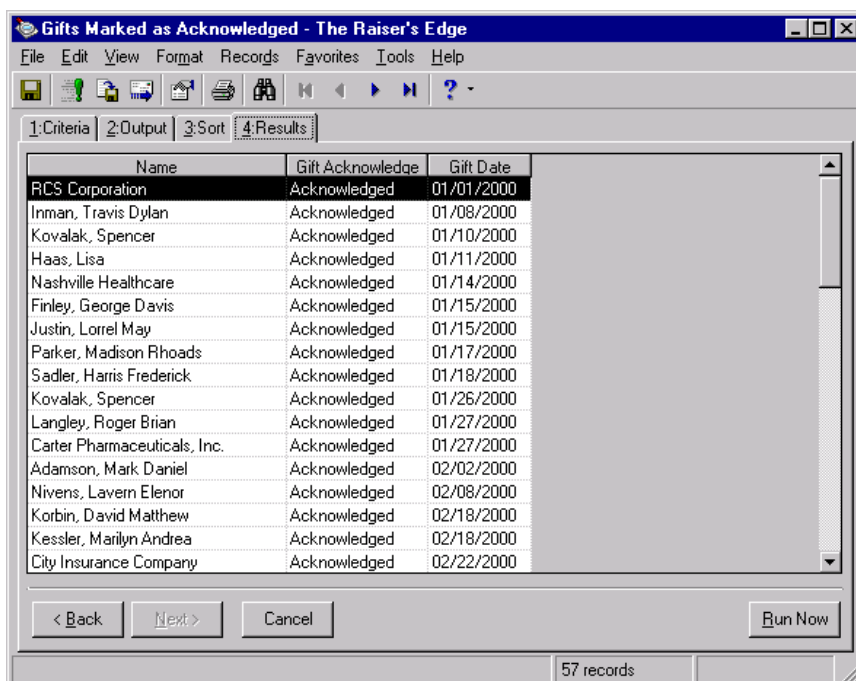
10. Click **Save** to save the results of your refreshed static query.

11. From the menu bar, select **File**, **Close** to close the refreshed static query.

Customize Query and Use Favorites

With *The Raiser's Edge*, you can customize *Query* to reduce the amount of time it takes to create, find, open, or perform any other functions with your queries. For example, you can create shortcuts for easy access to the queries you use most frequently. You can further customize *Query* by making certain decisions affecting your query record screens. You can establish a default query format and type, depending on the selections you use most often. You can also create a list of your favorite query fields to reduce the time it takes to find the fields you want to use. User Options provide another option for customizing the query record screen. You can establish user options to automatically add criteria and sort fields to a query's output. All these options simplify the querying process and help save you time. For more information about Query User Options, see "Query User Options" on page 13.

▶ **Add a query to the list of favorites**

Note: For more information about **Favorites** on the Home page, see the *Program Basics Guide*.

If you create query templates or have queries which you use constantly, you can add them to a list of favorites. Adding frequently used queries to your list of favorites provides easy access to them, especially if the list displayed in the Query page is extensive. Your favorites are listed in the order in which they are added, unless you specify an alternate order. Once you compile your list of favorite queries, you can run a query without opening it, right from the **Favorites** shell menu or the Home page.

Note: We recommend creating a list of query favorites. A list of queries you use most often saves time when you want to locate a query.

1. From the Query page, highlight the query you want to add to your list of favorites. For more information about accessing the Query page, see "Navigate in Query" on page 5. For more information about opening a query, see "Open a query record" on page 9.
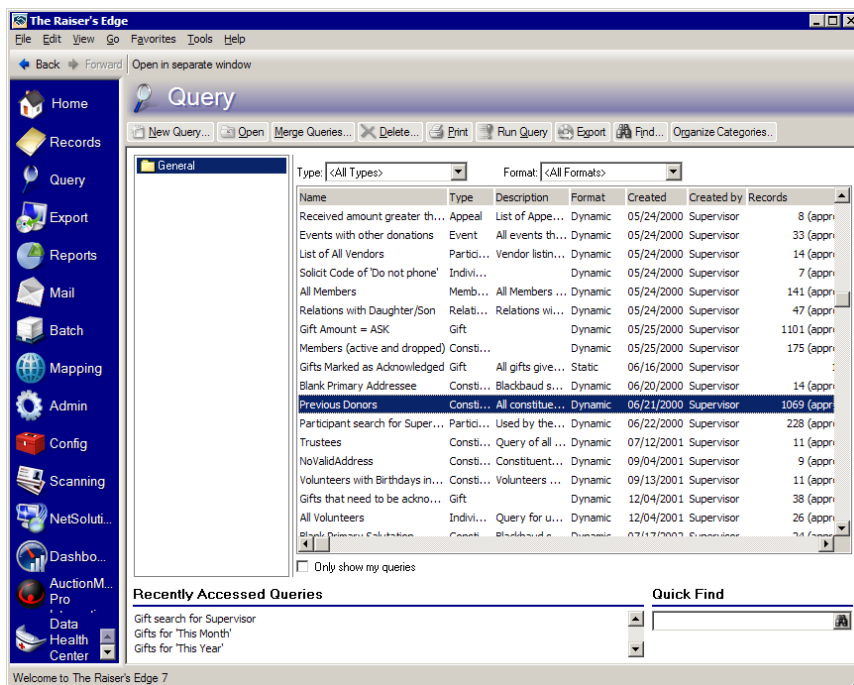
2. From the menu bar, select **Favorites**, **Add to Favorites**. The New Favorite screen appears.

3. Leave the default information in the **Name** and **Description** fields.

Note: The **Use The Raiser's Edge to open this item** checkbox only enables if you are adding an external.

4. In the **Default Action** field, select if you want to run, open, export, or send the query as email from the Home page.

   Once the task is added to Favorites, you can also right-click the task to select these options from a menu that appears.

5. In the **Create in** field, click the drop-down arrow and select the "Queries and Records" folder.

6. Click **OK**. The query is added to the favorites list on the Home page.

Favorite Query Fields

You can select the fields you use most often and include them in a list of favorites. This shortcut is helpful because it reduces the amount of time it takes to search all field categories to access the fields you want to use in your query. For example, if you work in the Development Office, you may use the summary criteria field gift amount often. You can include this field in your list of favorites and you do not have to search for it every time you want to use it. Your list of favorite query fields can be accessed from the Criteria, Output, and Sort tabs. You can create your list of favorite query fields from an existing query or you can create it from a new query.

▶ **Create a list of favorite query fields**

Note: Due to the unique customization of fields that begin with "Specific", you cannot include these in your list of query favorites. For example, if you attempt to move **Specific Attributes** to the **Fields to include** box, the right arrow button disables.

1. From a query record, from the menu bar select **File**, **Organize Favorite Fields**. The Favorite Fields screen appears. For more information about accessing the Query page, see "Navigate in Query" on page 5. For more information about opening a query, see "Open a query record" on page 9.
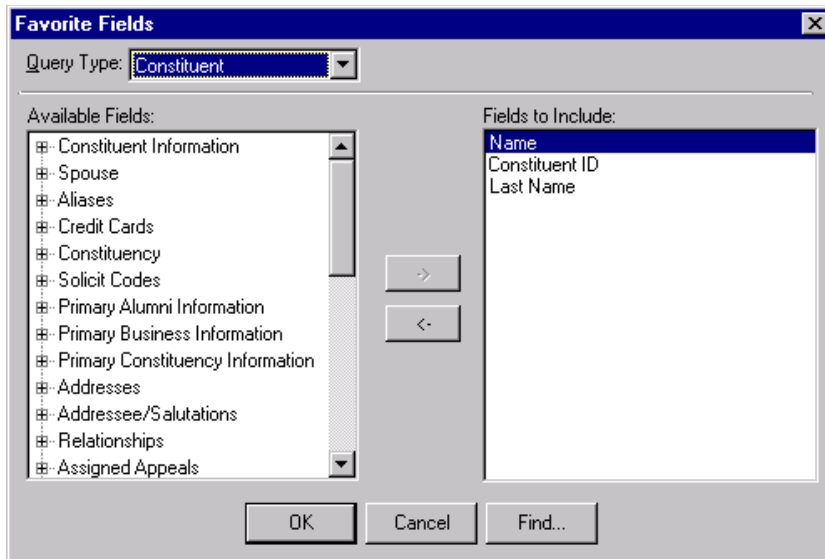
2. You can include favorite fields for each query type available in the program. In the **Query Type** field, select the query type you want to select favorite fields for.

Tip: You can use **Find** for quick access to a field.

3. In the **Available Fields** box, expand the category containing the fields you want to include in your list of favorites. To expand a category, click the plus sign to the left of the information category.

Tip: From the **Available Fields** frame of a query record, you can also add fields to your list of favorites by highlighting the field and selecting **Add to Favorite Fields** from the right-click menu.

4. In the **Available Fields** box, highlight the fields you want to use and click the right arrow button to move them to the **Fields to Include** box.

5. Once you compile your list of favorites, click **OK** to save it. Your favorite fields display under the Favorite category in the **Available Fields** box.
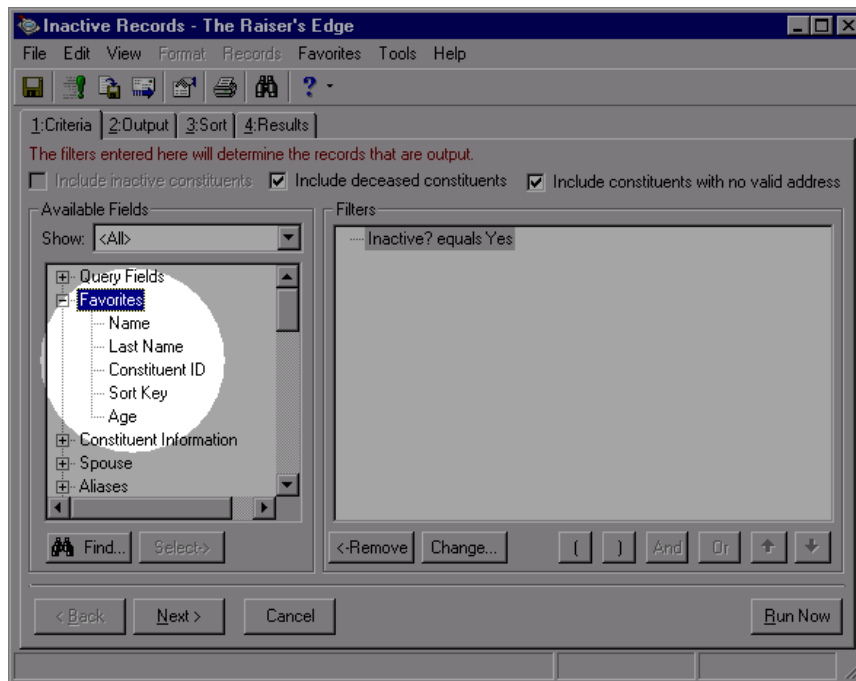
Query Properties

You can review the properties for an existing query. Query properties are the overall characteristics of the query. These settings include type, format, description, formatting options, and access/editing rights information. This is especially useful if you want to determine if the query can be used to perform another function in *The Raiser's Edge*. For example, if you want to assign output limits to a query, you need to make sure you are working with a static query, because you can only establish limits to queries with that format.

▶ **View a query's properties**

Note: You can also view query information by highlighting the query and selecting **File**, **Properties** from the menu bar of Query page or by selecting **File, Properties** from the menu bar of an Open query screen.

1. From the query record, click the **Properties** button on the toolbar. The Properties screen appears. For more information about accessing the Query page, see "Navigate in Query" on page 5. For more information about opening a query, see "Open a query record" on page 9.
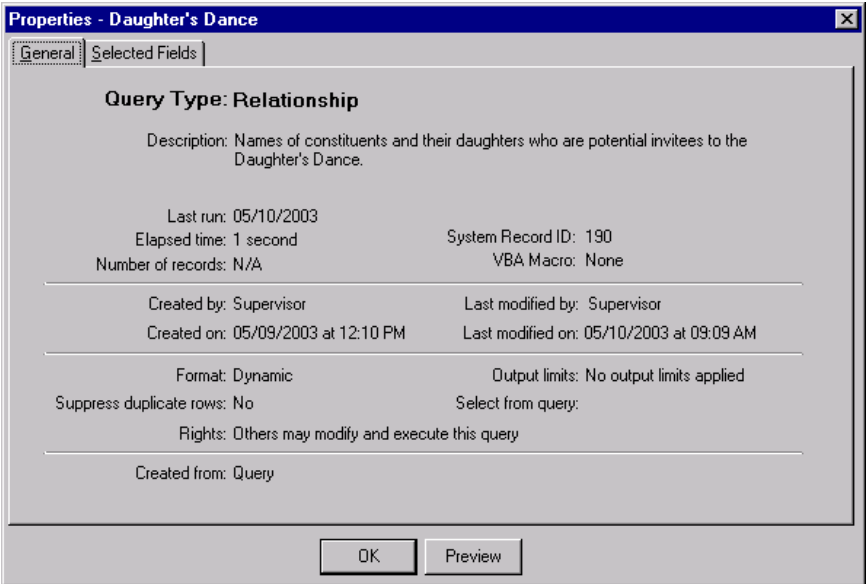
2. To view general information about the query, select the General tab. This tab includes information about the query type, format, description, date the query was run, and date the query was last modified.

3. To view the filter, output, and sort fields used to define the query, select the Selected Fields tab.
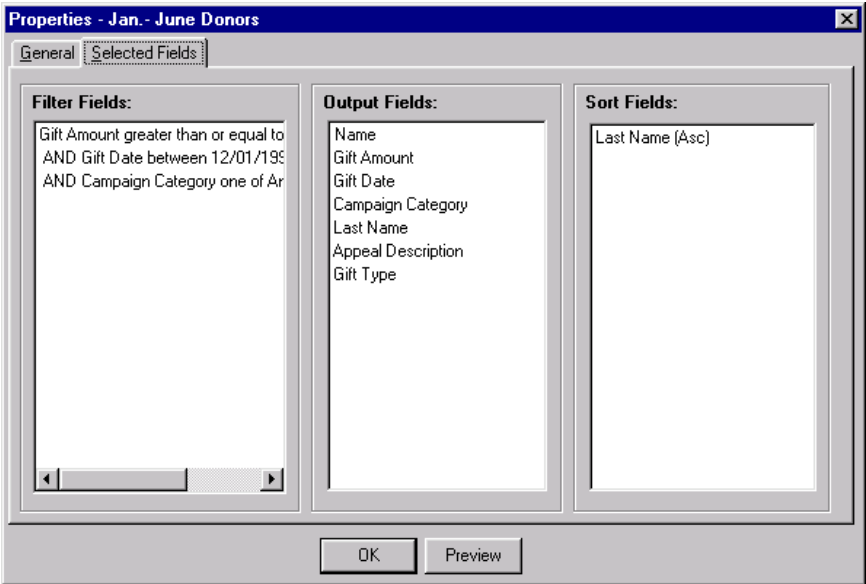
4. To preview the properties before printing, click **Preview**. From the preview screen, you can print or email the properties of the query.

5. To close the screen, click **OK**.

6. From the menu bar, select **File**, **Close** to close the query record.

Organize Query Categories

Note: When you save a query, you can add it to an existing category or create a new category.

To help manage and organize the queries you create, you can create directories, or categories, in which to group them, such as by user or by the query's intended use. To create and organize query categories, select **Organize Categories** from the menu bar of the Query page. On the Organize Categories screen, you can create, rename, and delete query categories. You can also adjust the order in which they appear on the Query page.

Categories that appear on the Query page are not specific to individual users. By default, the General category appears. You cannot rename or delete this category.

▶ **Create query categories**

1. From the Query page, on the menu bar, select **Organize Categories**. The Organize Categories screen appears.
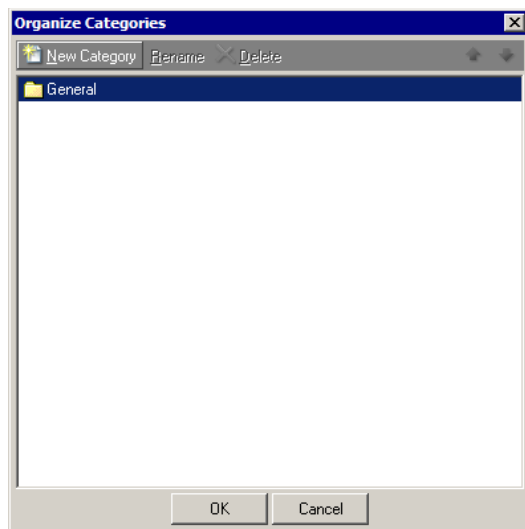
2. To create a new query category, click **New Category**. The New Category screen appears.
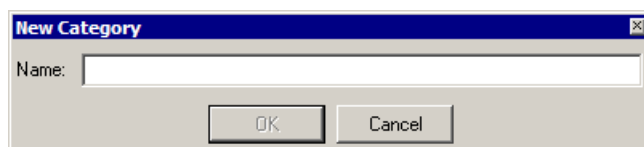
3. In the **Name** field, enter a name for the new query category.

4. Click **OK**. You return to the Organize Categories screen.
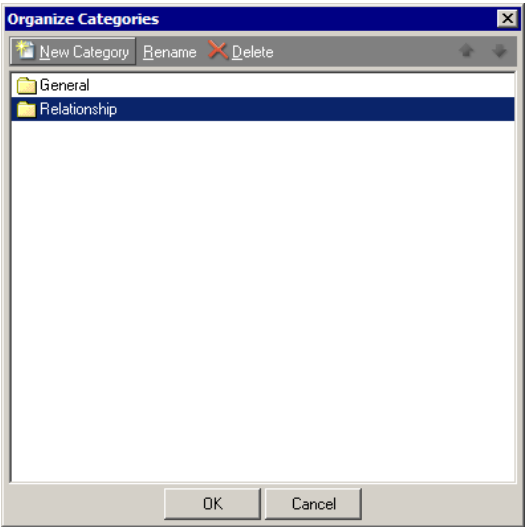
5. Click **OK**. You return to the Query page. In the box on the left, the new category appears.
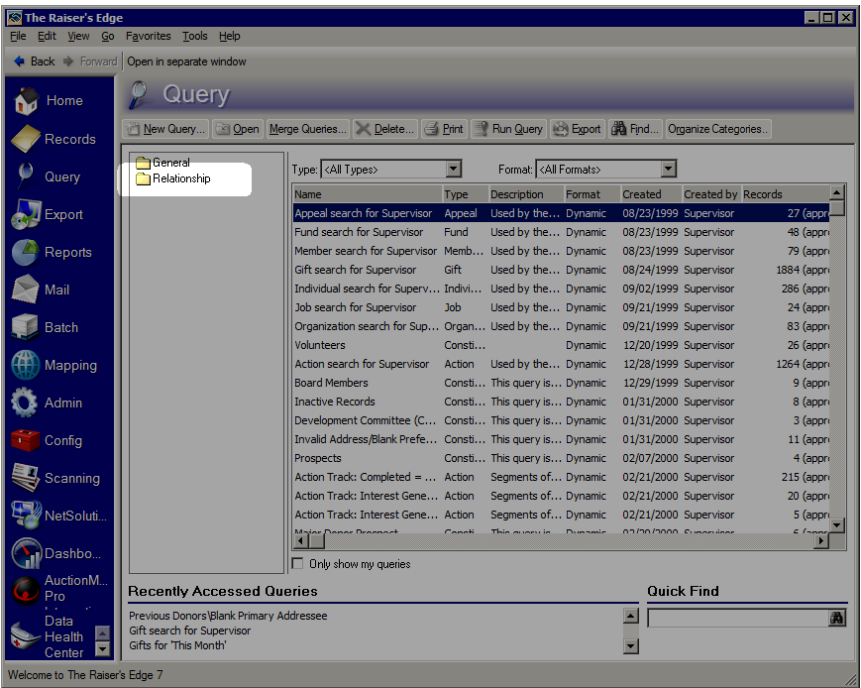
6. To add an existing query to the new category:

a. In the query grid, select the query to add to the category.

b. Right-click and select **Change Category**.
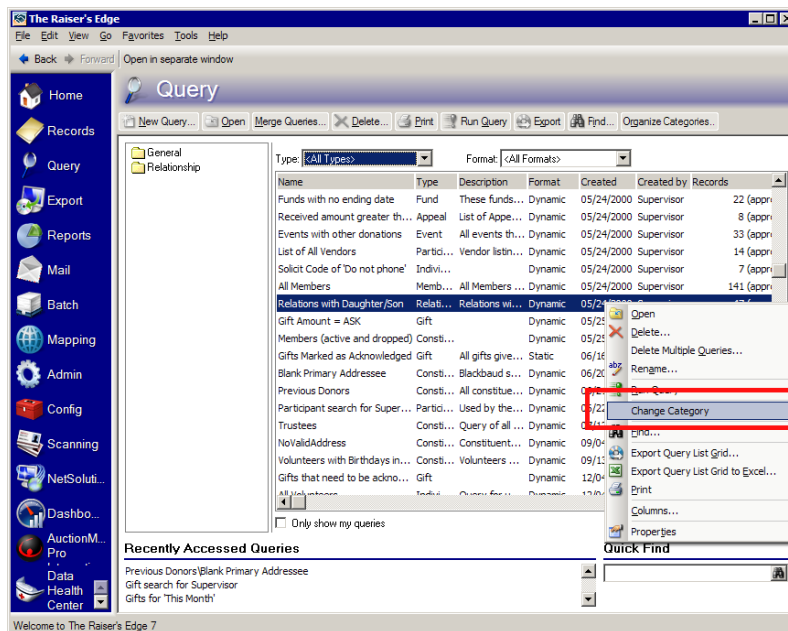
Tip: To save time, you can drag and drop a query from the query list into the appropriate category on the left.

The Query Options screen appears.
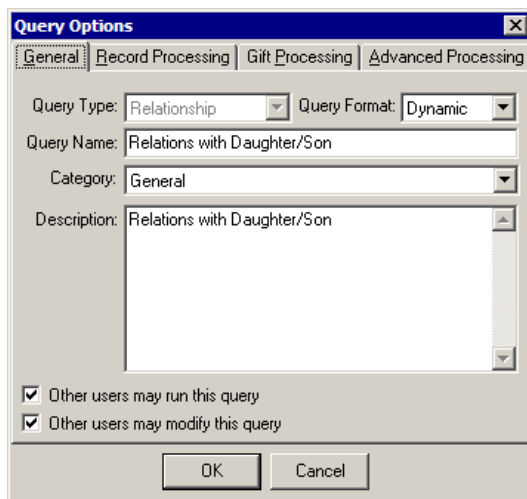
c. In the **Category** field, select the new category.

d. Click **OK**. You return to the Query page.

Query Lists

You can create query lists to simplify the results of a query and manage the constituents, individuals, and organizations that appear in the results. Query lists take the results of an existing query, and place them into a list you can edit and save separately for use in other processes throughout *The Raiser's Edge*, such as in mailings. For example, you can create a list from a query of all of your volunteers, and then edit the list to include only certain volunteers.

Note: The results of a query list are considered static, and will not change unless you manually edit the list to add or remove constituents.

▶ **Create a query list**

1. From the Query page, click **New Query List** on the action bar. The Open Query screen appears. For more information about how to access a Query page, see "Navigate in Query" on page 5.

2. On the Open Query screen, search for and select the query from which to create a query list. You can also create a new query to use if necessary.

3. Click **Open**. The New Query List page appears.

To display additional information about constituents in the results list, such as gift information and constituent code, click **Show Details** on the action bar.

a. By default, the **Name**, **Primary Salutation**, **Address**, **City**, **State**, and **ZIP** columns appear. To display additional columns, click **View** on the menu bar, and select **Columns**. The Columns screen appears.

b. Select a column from the **Columns** grid, and move it to the **Display these columns** grid. You can select the column and click the left or right arrow, or double-click the column to move it.

Tip: Use the up and down arrows to create the order in which the columns display on the query list record.

c. After you select the columns to view, click **OK**. You return to the query list record, and the new columns are displayed.

Find a Constituent in a Query List

The **Find** button is available in many areas of the program to help you locate specific fields or items from a list. It is particularly useful in saving you time scrolling through lists with so many entries that all are not visible at the same time in the box or grid. For example, you can click **Find a Constituent in the List** from a query list record to find a specific constituent in your results. When you click the **Find** button, the Find screen appears so you can define the search for a field or other item.

▶ **Find a constituent in a query list**

1. From a query list, click **Find a Constituent in the List** on the action bar. The Find screen appears.
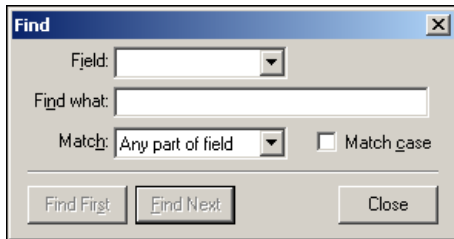
> **Note**: To open a constituent record, select a constituent in the list and click **Open** on the action bar. The constituent record appears.

2. In the **Field** field, select the column of the list you would like to search. For example, you can select **Name** to search for the constituent by name, or select **Constituent Code** to search for constituents who have a specific constituent code.

3. In the **Find what** field, enter the name of the entry you want to find. If you are unsure of the spelling of the field for which you are searching, you can substitute the wildcard character ? for part, or the character * for all of the entry.

4. In the **Match** field, select whether you want your entry in the **Find what** field to match: Any part of field, Whole field, or Start of field.

5. If you want the search to match any capitalization in the field name, select **Match case**.

6. When you click the **Find First** button, the first match that meets your search criteria is highlighted in the query results list.

7. Click the **Find Next** button to find any additional entries that meet your criteria.

8. After you locate the entry you want to find, click **Close** to exit the Find screen. You return to the query record and the last field found is highlighted.

Add Constituents to a Query List

After you create a query list, you can add constituents to the list as necessary. You can add a single constituent, or a group of constituents at a time.

▶ **Add constituents to a query list**

1. From a query list, click **Add to List** on the action bar and select **One Constituent** or **A Group of Constituents**.
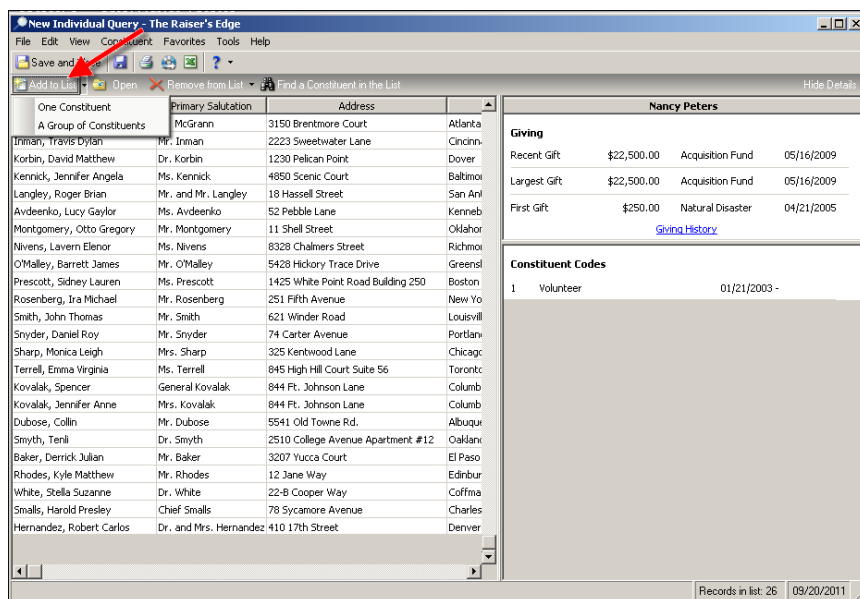
2. If you selected **One Constituent**, the Open screen appears.

   If you selected **A Group of Constituents**, the Open Query screen appears.

3. Search for the individual, or constituent query to add to your query list.

4. Click **Open**. You return to the query list record, and the constituent or group of constituents are added to the list.

Remove Constituents from a Query List

After you create a query list, you can remove constituents from the list as necessary. You can remove a single constituent, or a group of constituents at a time.

▸ **Remove constituents from a query list**

1. From a query list, select the constituent you would like to remove from the list. Click **Remove from list** on the action bar, and select **Selected Constituent(s)**.
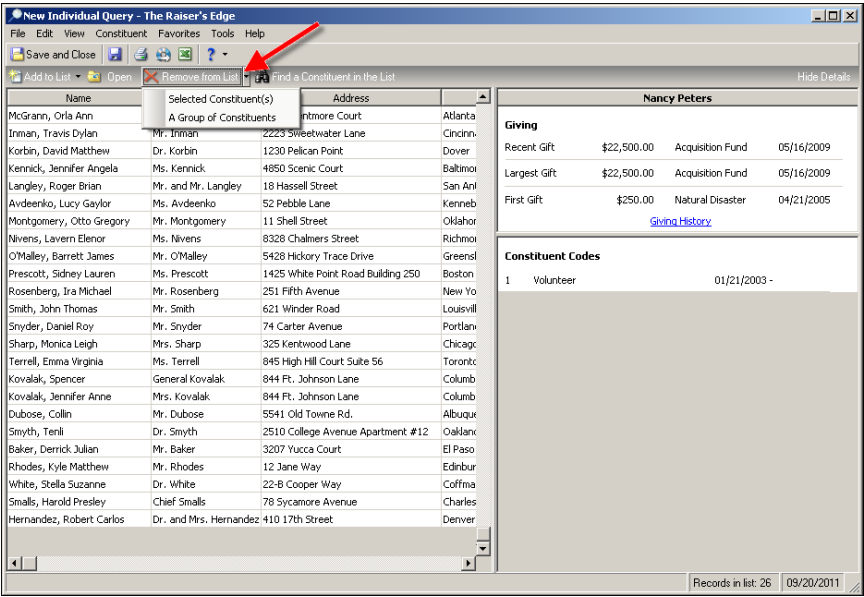
Note: To select multiple constituents, hold down **CTRL** on your keyboard and select the constituents you would like to remove.

2. Click **Yes**. You return to the query list, and the constituent is removed from your list.

▸ **Remove a group of constituents from a query list**

1. From a query list, click **Remove from List** on the action bar and select **A Group of Constituents**. The Open Query screen appears.

2. Search for the constituent query to remove from your query list.

3. Click **Open**. A confirmation message appears.

4. Click **Yes**. You return to the query list record, and all constituents in the select query are removed from the list.

View Change Log

Since multiple users may be able to access and edit a query list, you can view a change log to track all the changes that have been made to a given list.

To view the change log, from a query list, click **View** on the toolbar and select **Change Log**. The Change Log appears and displays the date of every change made to the query list, as well as the user who made the change, the action, description, and the number of records left in the query list.

Work with Advanced Query Functions

Warning: You should attempt advanced query functions only after you master basic query concepts. Advanced query functions, such as deleting multiple queries, can be reversed only from a backup of your database.

After you master the basic knowledge necessary to create and edit queries, you can begin to manipulate the results using more advanced query functions. Advanced query functions add flexibility to *The Raiser's Edge*. You can delete multiple queries, refresh and merge queries, change the appearance of query results, or you can eliminate duplicates from your query results.

Create Advanced Queries

After you master basic query concepts, you can begin to expand your knowledge and usability of *Query*. A common advanced query involves combining multiple fields of the same group into one query to achieve results you need for other functions such as reports, exports, or mail merges.

▶ **Create a query of records with nothing in common**

> *Scenario:* Your top five major donors deserve special attention in various ways. These donors have nothing in common, but you need to create a query of these constituents to group them together for special tasks, such as processing specific reports or sending event invitations. Create a query of these records that having nothing in common using the **Specific Record** field.

1. From the Query page, on the action bar, click **New Query**. The New Query screen appears. For more information about accessing a query page, see "Navigate in Query" on page 5.

2. In the **Query type** field, select "Constituent" because you want to access information from both organization and individual records.
3. In the **Query format** field, select "Dynamic".

4. Click **OK**. The New Constituent Query record screen appears.

5. Mark the **Include inactive constituents**, **Include deceased constituents**, or **Include constituents with no valid address** checkbox to indicate whether or not you want these constituents in your queries.

    You generally do not want to include inactive constituents, deceased constituents, or constituents with no valid address in your queries. However, checking any of these checkboxes gives you the ability to include them for historic purposes. For this procedure, leave the default marks in the checkboxes.

6. In the **Show** field, select "<All>". You can select a specific group of fields, or select "<All>" to see a complete list of Available Field categories.

7. Click the plus sign to the left of the group name to reveal criteria fields under each group. Click the Constituent Information, and highlight the **Specific Record** field.
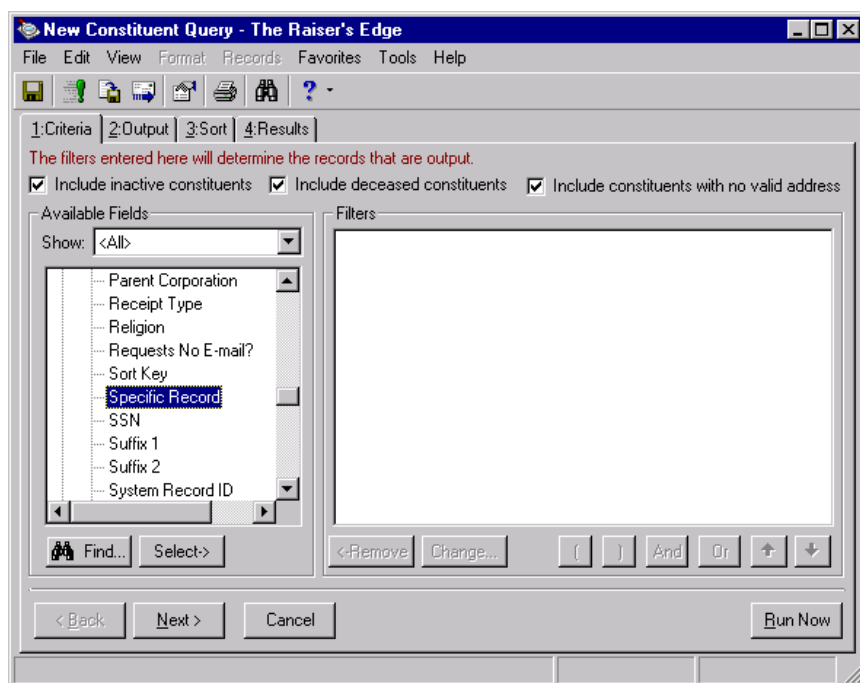
8. Click **Select**. The Edit Field Criteria screen appears.
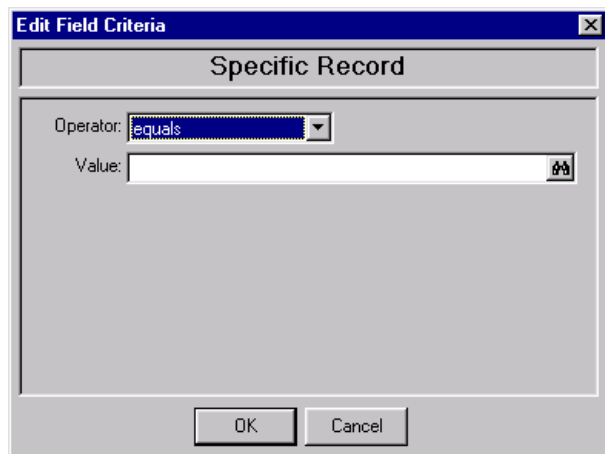
9. In the **Operator** field, select "one of". For more information about query operators, refer to "Understand Query Criteria Operators" on page 23.

10. Place your cursor in the first line of the **Constituent ID** grid.
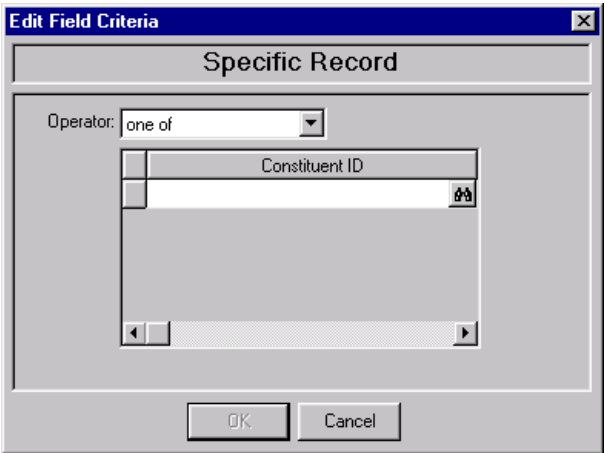
11. Press **F7** on your keyboard. The Open screen appears.
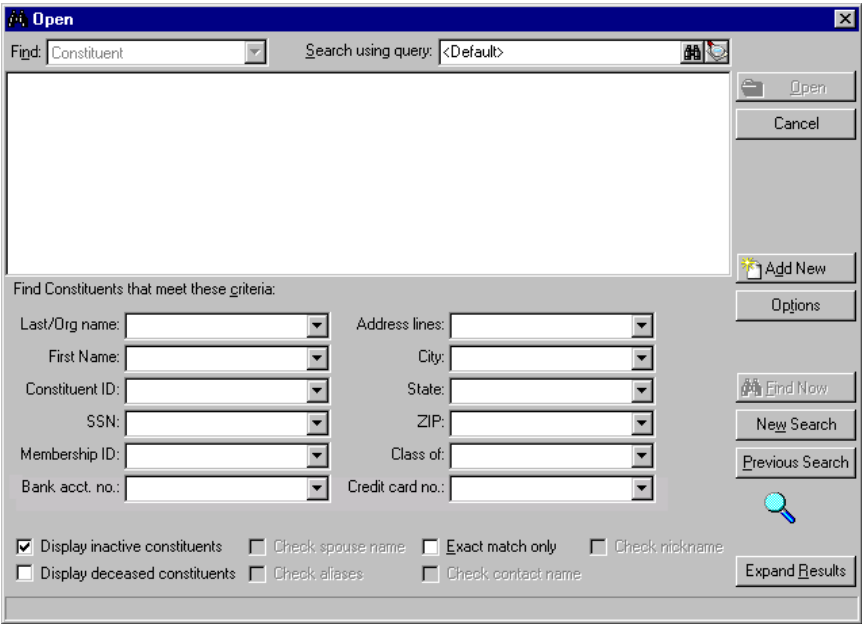
12. Search for the record you need and click **Open**. The constituent name appears in the **Constituent ID** grid.

13. To move your cursor to the next line, press **TAB** on your keyboard.

14. Repeat the previous steps to enter your remaining four major donors.

15. Click **OK**. The criteria field with the criteria operator appears in the **Filters** box.
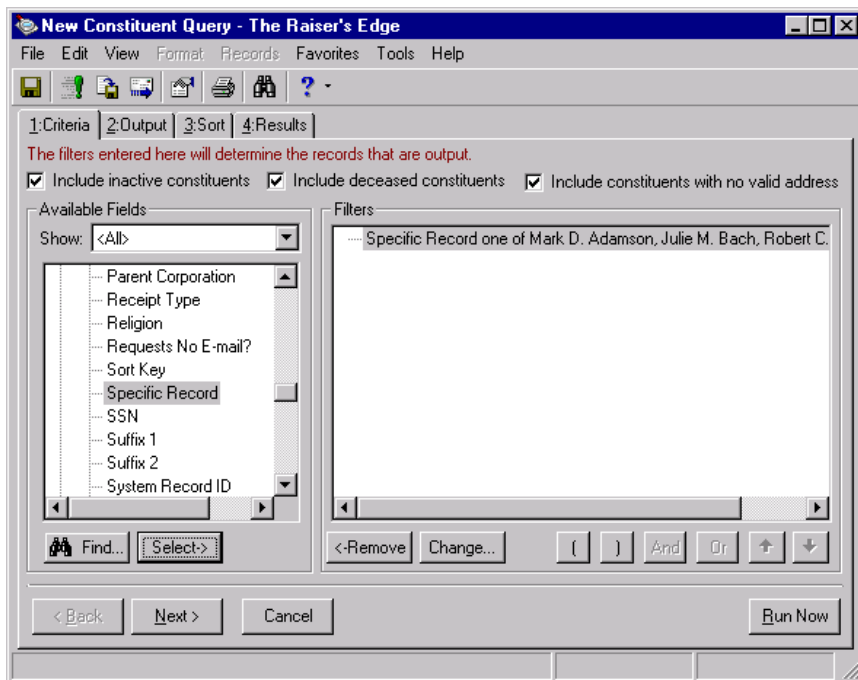
Note: For more information about selecting fields on the Output tab and Sort tab, and viewing query results on the Results tab, see "Create a constituent query" on page 28.

16. On the toolbar, click **Save**. The Save Query As screen appears.
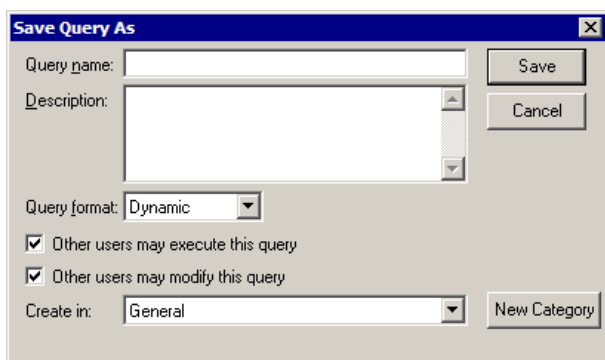
Note: We recommend you assign unique names and descriptions to your queries. This facilitates locating them if you use this function extensively.

17. In the **Query name** field, enter "Top 5 Major Donors". For more information about the Save Query As screen, see "Save a Query" on page 47.

18. Click **Save**. The query is saved and appears in the grid on the Query page.

▶ **Create a query using Summary Information fields**

> *Scenario:* The board members of your organization ask for a list of constituents donated gifts greater than $50 each year in the years 2000, 2001, and 2002. Create a query for this request and sort the results alphabetically by **Name**.

1. From the Query page, on the action bar, click **New Query**. The New Query screen appears. For more information about accessing a Query page, see "Navigate in Query" on page 5.
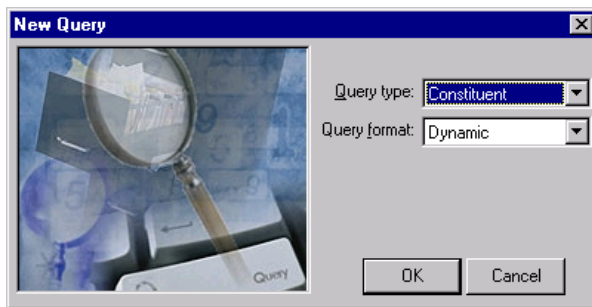
2. In the **Query type** field, select "Constituent" because you want to access information from both organization and individual records.

3. In the **Query format** field, select "Static" because the board members request is for previous years.

4. Click **OK**. The New Constituent Query record screen appears.

5. Mark the **Include inactive constituents**, **Include deceased constituents**, or **Include constituents with no valid address** checkbox to indicate whether or not you want these constituents in your queries.

   You generally do not want to include inactive constituents, deceased constituents, or constituents with no valid address in your queries. However, checking any of these checkboxes gives you the ability to include them for historic purposes. For this procedure, leave the default marks in the checkboxes.

6. In the **Show** field, select "<All>". You can select a specific group of fields, or select "<All>" to see a complete list of Available Field categories.

7. Click the plus sign to the left of the group name to reveal criteria fields under each group. Click the Summary Information, Summary For Gift group, and highlight the **Total Amount of Gifts** field.
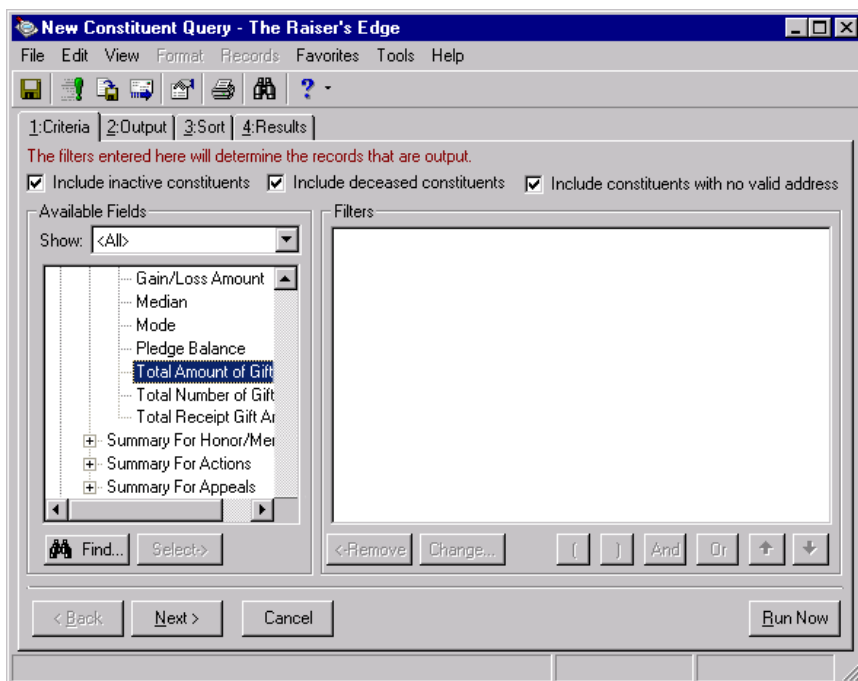
Note: For information about the default gift types included in query results when using **Summary Information** fields, see "Default Gift Types for Summary Information Fields" on page 89.
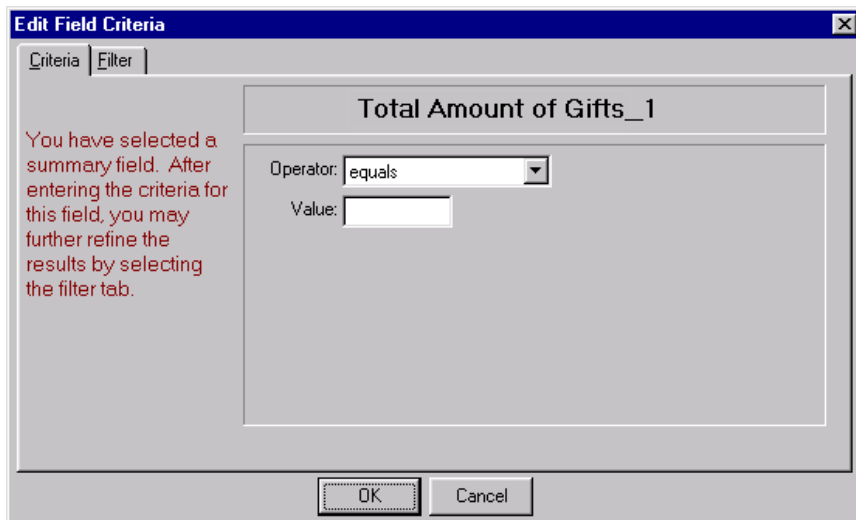
8. Click **Select**. The Edit Field Criteria screen appears.

9. In the **Operator** field, select "greater than or equal to". For more information about query operators, refer to "Understand Query Criteria Operators" on page 23.

10. In the **Value** field, enter the amount $50. Because this field is already formatted for monetary amounts, you do not have to enter in the $, only the amount.

11. Select the Filter tab.

12. In the Gift Information group, highlight **Gift Date** and click **Select**. The Edit Field Criteria screen for the **Gift Date** appears.

13. In the **Operator** field, select "between". For more information about criteria operators, refer to "Understand Query Criteria Operators" on page 23.

14. In the **Value 1** field, enter the date 01/01/2000.

15. In the **Value 2** field, enter the date 12/31/2000.

16. Click **OK**. You return to the first Edit field Criteria screen.
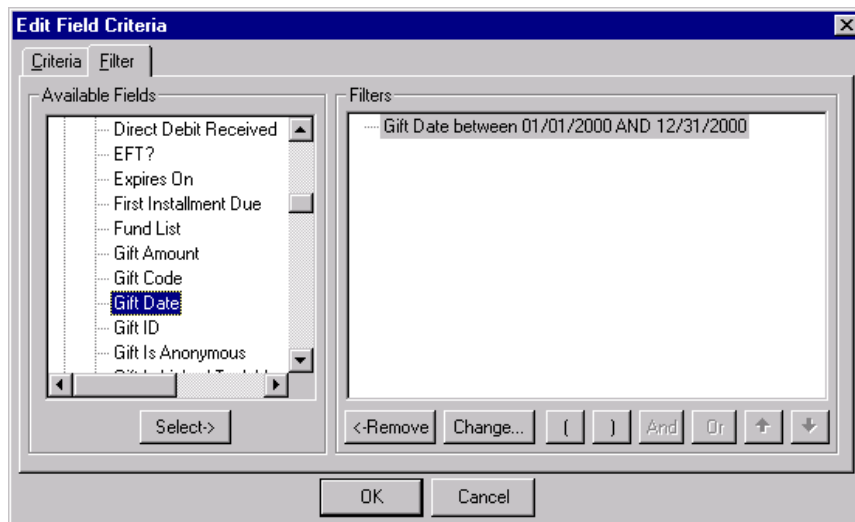
17. Click **OK**. The criteria field with the criteria operator appears in the **Filters** box.
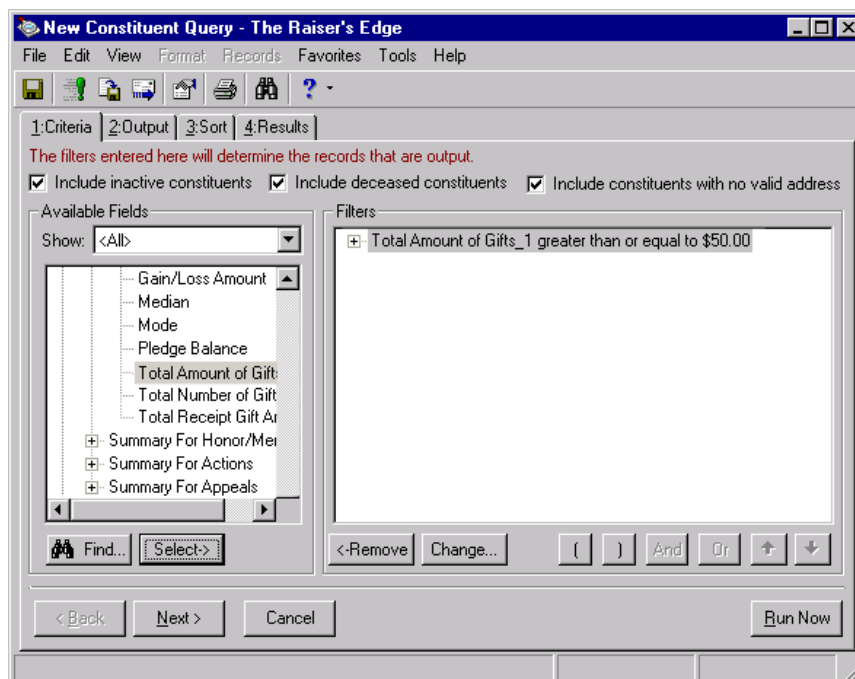
18. Highlight the **Total Amount of Gifts** field a second time in the **Available Fields** box to select the gift dates for 2001.

Note: This message appears if you select **Ask me each time I select a summary** in the **You can choose whether or not the system should automatically apply filter criteria to summary fields** frame of Advanced Query User Options.

19. Click **Select**. A message appears.
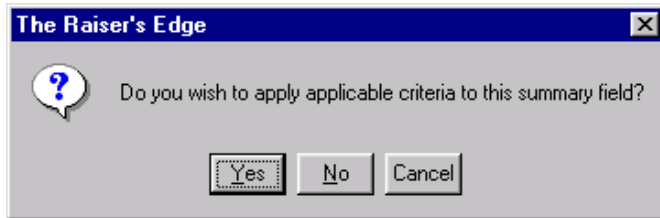
> **Note**: Click **Yes** if you want to retain the filters you select on the Filter tab, but need to change the operator and values for the **Total Amount of Gifts** field on the Criteria tab.

20. To select the filters you need on the Filter tab of the Edit Criteria screen, click **No**.

21. Repeat the previous steps to complete the query for the years 2001 and 2002.

22. Because you want constituents that have given at least $50 all three years, you must change the combining operators. To do this, highlight the second filter and click **And** below the **Filters** box.
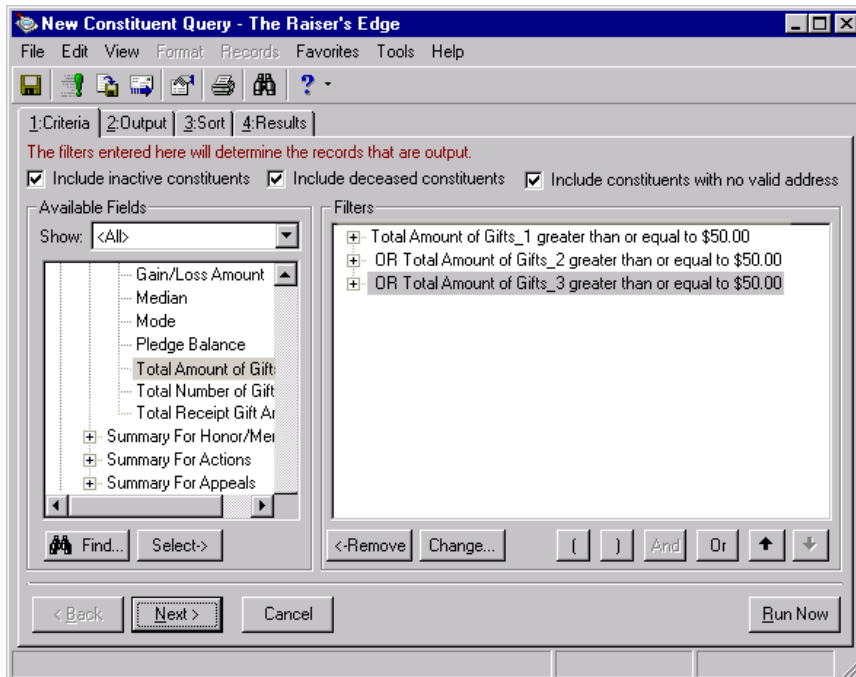
23. Highlight the third filter in the **Filters** box and click **And**. For more information about combining operators, see "Understand Combining Operators" on page 27.

24. Select the Output tab.
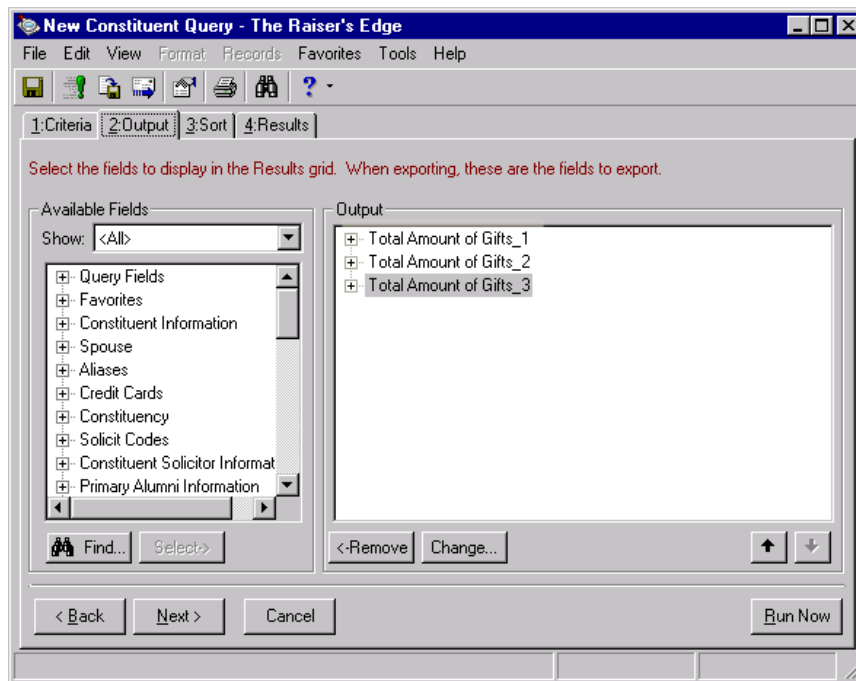
25. Click the plus sign to the left of the Constituent Information group. Highlight the **Name** field.

Note: Do not change the filters for the **Total Amount of Gifts** fields on the Output tab. Use the same filters on the Criteria tab and the Output tab.

26. Click **Select**. The **Name** field moves to the **Output** box. Use the up arrow button in the lower right corner to move **Name** to the top of the list.
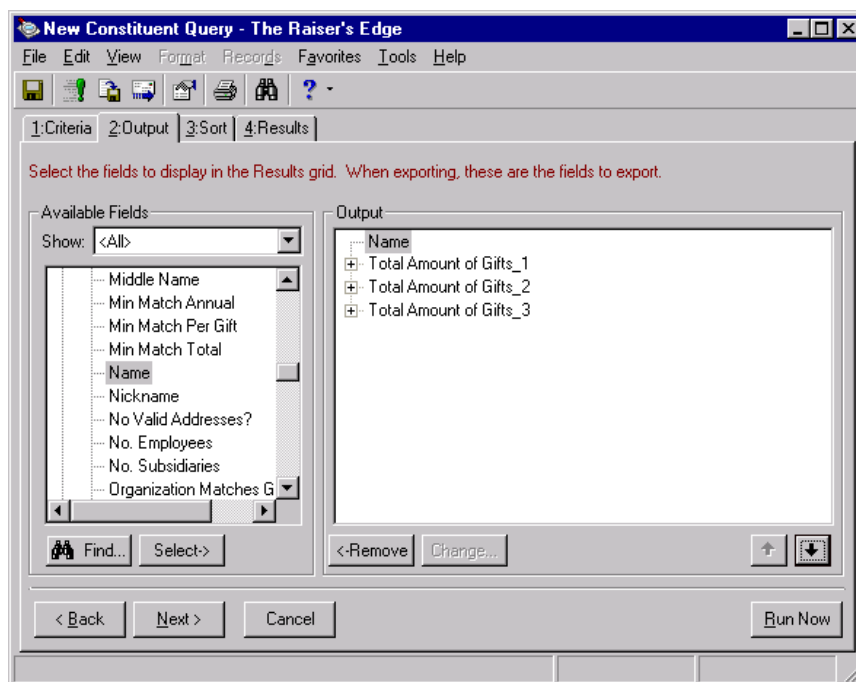
27. Select the Sort tab.
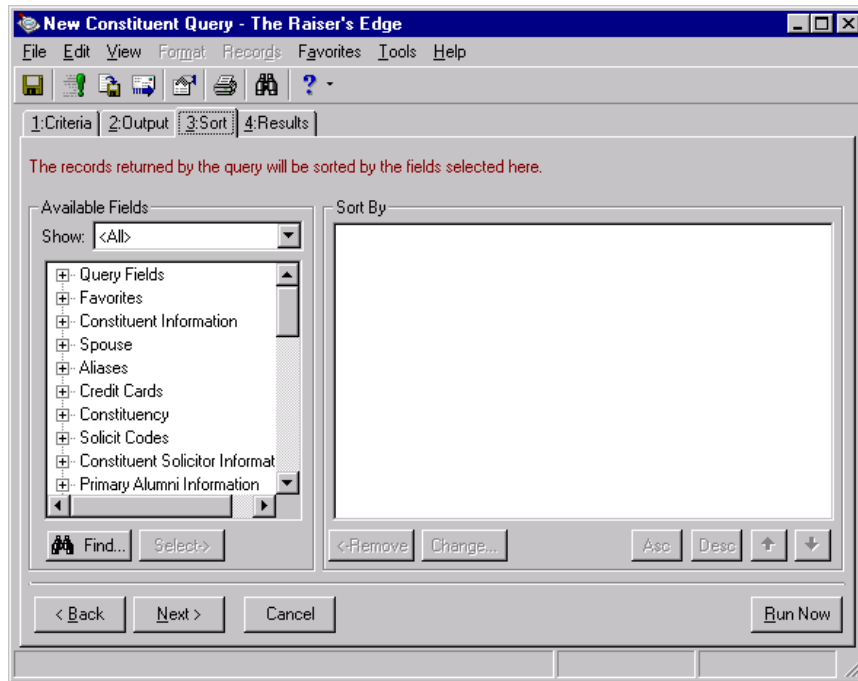
28. Click the plus sign to the left of the Query Fields group. Highlight the **Name** field.

29. Click **Select**. The Name field moves to the **Sort By** box.
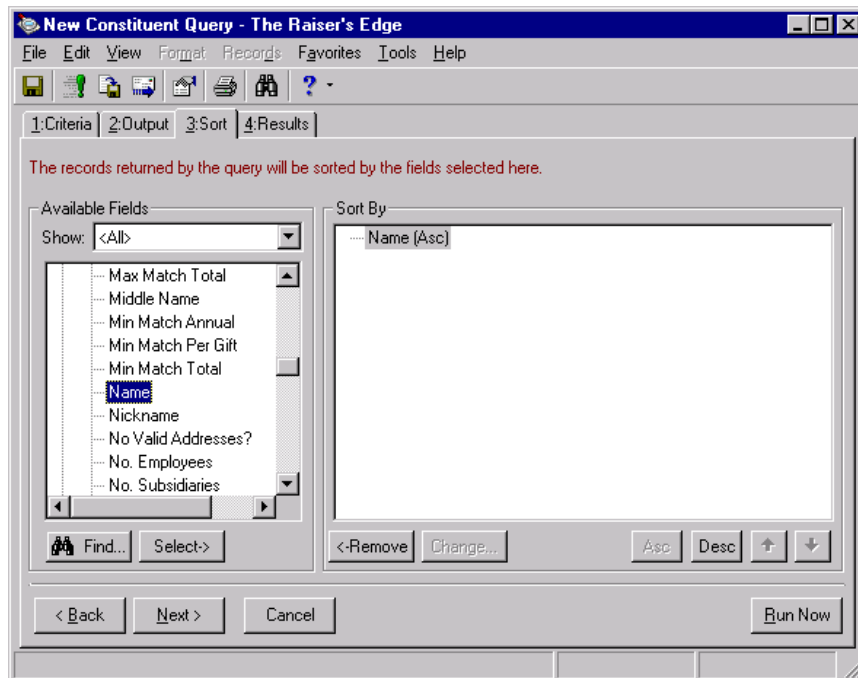
Note: To rename a column heading, right-click over the column name. Select **Column Heading** from the menu. Enter the name you prefer in the **Column heading** field and click **OK**. You can also rename a column heading from the Output tab. Right-click the field in the **Output** box, and select **Column Heading** from the menu that appears. Enter the column name you prefer in the **Column heading** field and click **OK**.

30. To view the results of your advanced query, click the Results tab.

31. Save and close the query. For more information about saving a query, see "Save a Query" on page 47.

If you use this query in another area of the program, such as *Export*, you must use the same criteria for processing that is used in this query.

Default Gift Types for Summary Information Fields

For information about the default gift types when you use **Summary Information** fields, refer to the following table.

Cash	Pledge
Matching Gift Pledge	Stock/Property
Stock/Property (Sold)	Gift-in-Kind
Recurring Gift Pay-Cash	Other

Note: Pledge write-offs and Matching Gift write-offs are subtracted from the totals.

If you need to include additional gift types in the query, select the **Gift Type** field. Use the "one of" merge operator to select the additional gift types you need. For information about merge operators, see "Understand Merge Operators" on page 90.

Merge Queries

Merging queries combines two queries to make a third. The records included in the final query are determined by the merging operator selected. Merging operators are simply the mechanisms that allow you to include or exclude records from your final query. You can merge queries of different formats (for example, merging a static query with a dynamic query), but both queries must be the same type (for example, constituent, gift, or event). For more information about query types and formats, refer to "Query Types" on page 20 and "Query Formats" on page 22.

Understand Merge Operators

Merging queries allows you to create a new query from two previously created queries. Merge operators determine how your queries are merged and which records are included in the final query. For example, if you want to send your organization's Annual Report to your constituents and you already mailed this information to your Board of Directors, you can create a query for your mailing using merging operators to exclude your Board of Directors.

Merge operators include AND, OR, XOR, and SUB. For the following examples, the left circle represents the primary query containing residents of Texas. The circle on the right represents the secondary query containing alumni. The darkened areas are the records included in the resulting merged query.

AND. When you use the merging operator "AND", only records that appear in both queries are included in the final query. For this example, the merged query consists of alumni living in Texas.
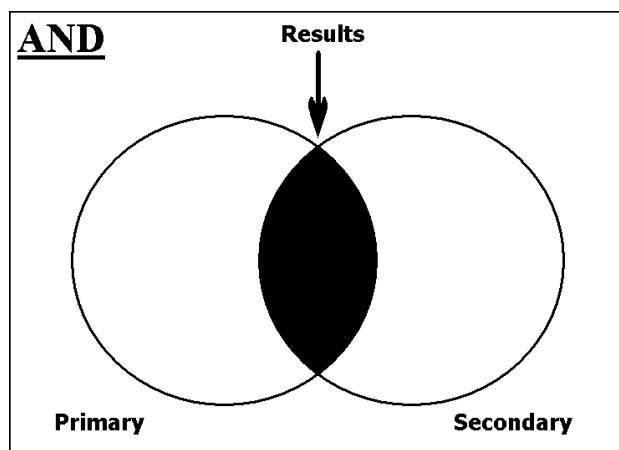
OR. When you use the merging operator "OR", the two queries are combined to make one query without record duplication. In other words, records can appear in either query or in both. The final query contains all records found in either query, but duplicate records will not appear. For this example, the merged query consists of all alumni and all Texas residents. If John Doe is an alumni and a resident of Texas, his name appears only once in the final query.
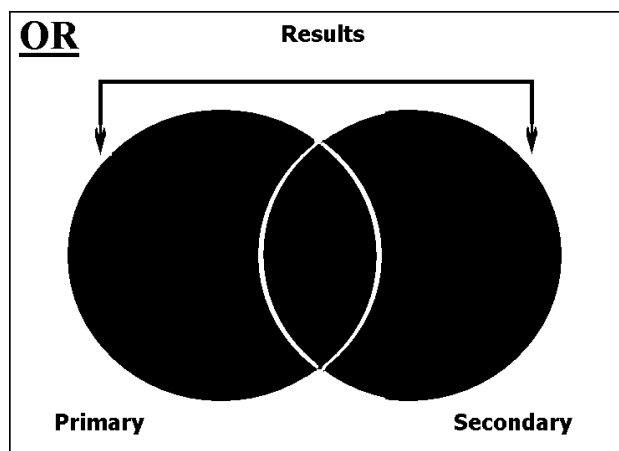
Note: You can merge queries with different formats (for example, merging a static query with a dynamic query), but they must be of the same type (for example, constituent, gift, or event).

XOR. When you use the merge operator "XOR", the final merged query contains only records that are in only one query or the other, but not in both. Records found in both queries are eliminated from the final query. For this example, the merged query consists of Texas residents who are not alumni and alumni who do not live in Texas.
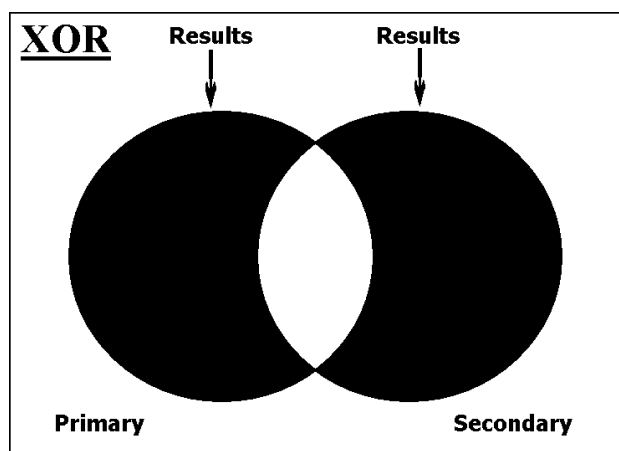
SUB. When you use the merge operator "SUB", the final query contains records found in the first (primary) query minus the records found in the second (secondary) query. This is the only merging operator in which the order of the queries is important. All records that appear in the secondary query and records in both queries are eliminated from the final query. For this example, the merged query consists of Texas residents who are not alumni.
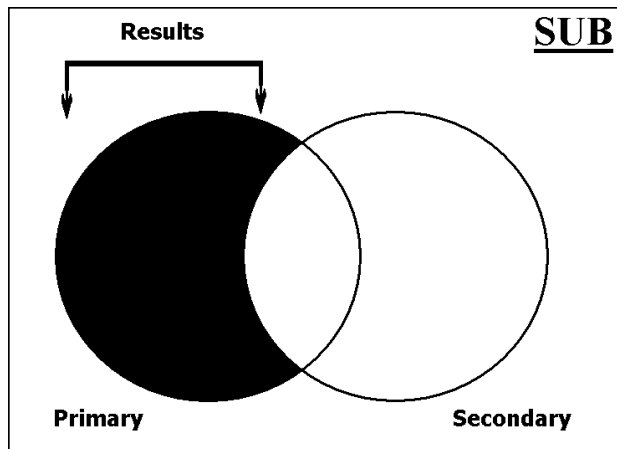
▶ **Merge queries**

Merged queries combine records found in two previously created queries. The records available in the merged query depend on the criteria operators used. Merged queries can be either static or dynamic and their criteria cannot be modified to include more filters. You can, however, include more output and sorting fields.

Note: You can also merge queries using **Merge** on the Query page.

1. From the Query page, from the menu bar, click **Merge Queries** on the Query action bar. The Merge Queries screen appears. For more information about accessing the Query page, see "Navigate in Query" on page 5.
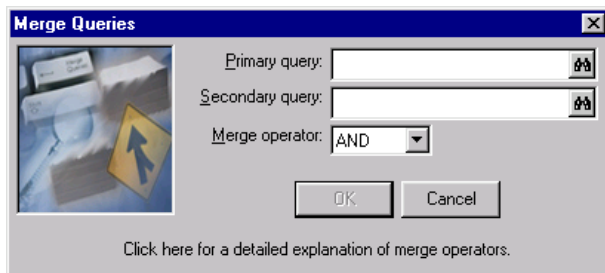
2. In the **Primary query** and **Secondary query** fields, enter the name of the queries you want to use.

    You can also select the primary and secondary query using the binoculars to access a list of available queries.

3. Select the **Merge operator**. The operator determines which records from each query are included in the merged query. For more information about query merge operators, refer to "Understand Merge Operators" on page 90.
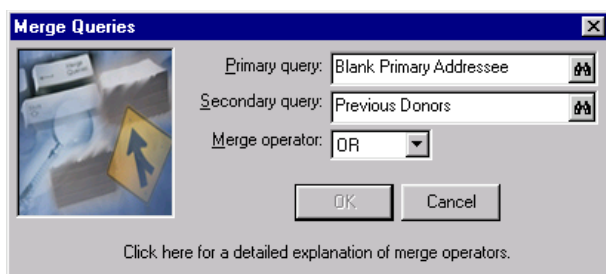
Note: If the queries you choose for merging have any filter fields with the "<ask>" operator selected, the Ask at Runtime Wizard appears.

4. Click **OK**. The query record screen appears.
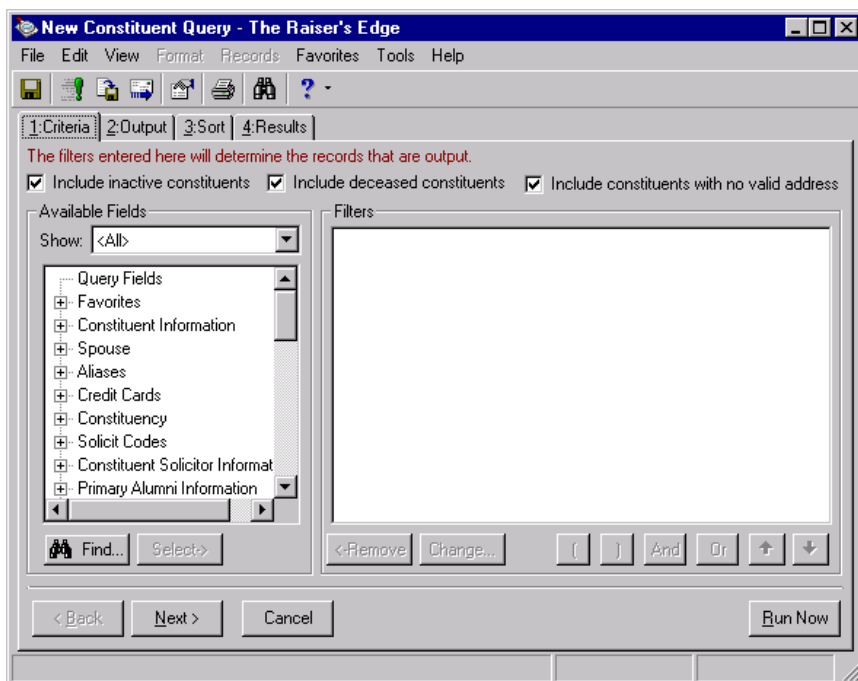
Note: The Criteria tab of a merged query is not available because you cannot add criteria fields or criteria operators to a merged query.

5. On the Output tab, select the output fields for your merged query. For more information about selecting fields, see "Create a constituent query" on page 28.

6. On the Sort tab, select the Sort field you want to use to sort the merged query. For more information about selecting a sort field, see "Create a constituent query" on page 28.

7. Select the Results tab. A message appears informing you the program will generate keys for a static query.
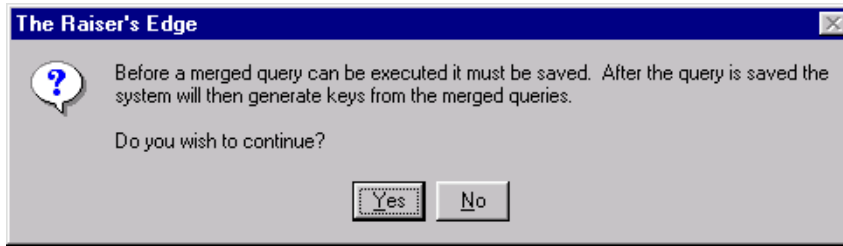
Note: Keys in a static query are equivalent to the number of records in a static query. This number is also visible at the bottom of the Results tab.

8. Click **Yes** to continue.

9. The Save Query As screen appears.
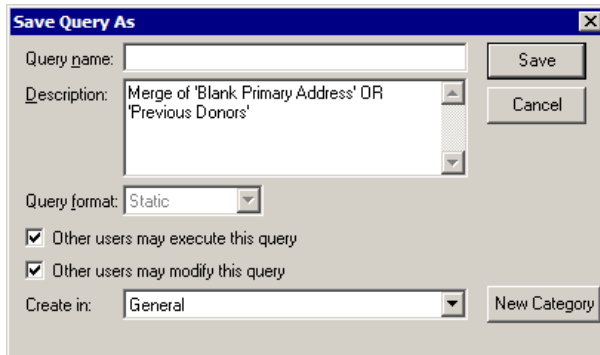
10. Enter the **Query name** for the merged query.

11. The **Description** appears automatically. This is the title of the Primary and Secondary query used for the merged query. The merge operator you select on the Merge Queries screen is also used in the **Description**.

12. The **Query format** field is disabled because a merged query can only be a static query.

13. If you want to authorize other users to run your query, mark the **Other users may execute this query** checkbox.

14. If you want to authorize other users to change your query, check the **Other users may modify this query** checkbox.

15. In the **Create in** field, select the category to store the query. By default, "General" appears.

16. To create a new category for the query, click **New Category**. On the New Category screen, enter a name for the new category and click **OK**.

17. Click **Save**. A confirmation message appears.
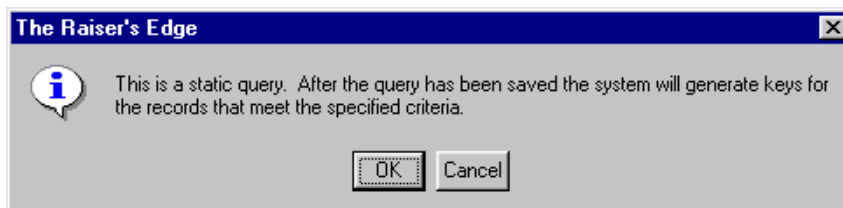
Note: Keys in a static query are equivalent to the number of records in a static query. This number is also visible at the bottom of the Results tab.

18. Click **OK**.

19. When the program finishes counting keys, or records in the query, another message appears telling you how many records the static query contains.
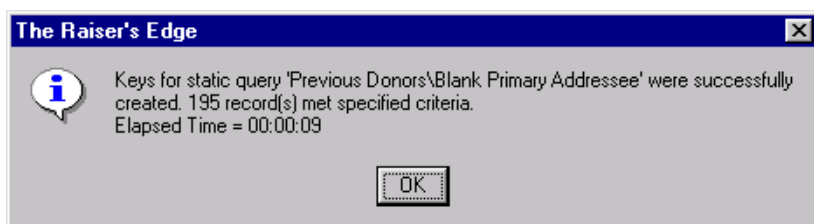
20. Click **OK**. The Results appear.
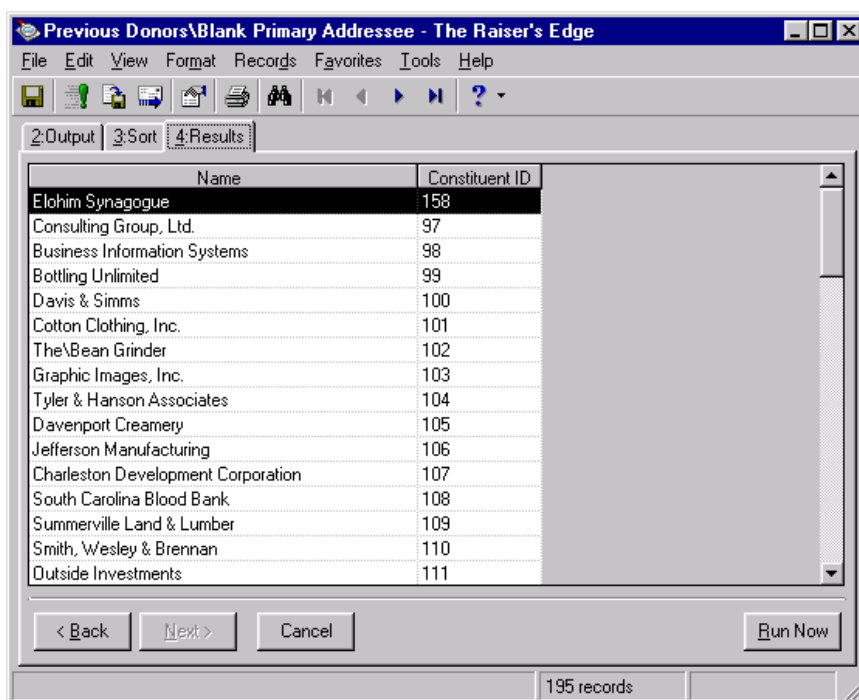
21. To close the merged query, select **File**, **Save** from the menu bar.

Refresh a Merged Query

Merged queries that are static queries can be updated. When you want to refresh a merged static query, the process varies slightly from updating a basic static query. A basic static query would be a static query that is not created as a result of merging two existing queries. For more information about updating basic static queries, see "Refresh a Static Query" on page 59.

▶ **Update a merged static query**

1. From the Query page, select the merged static query you want to open. For more information about accessing the Query page, see "Navigate in Query" on page 5. For more information about opening queries, see "Access a Query" on page 9.
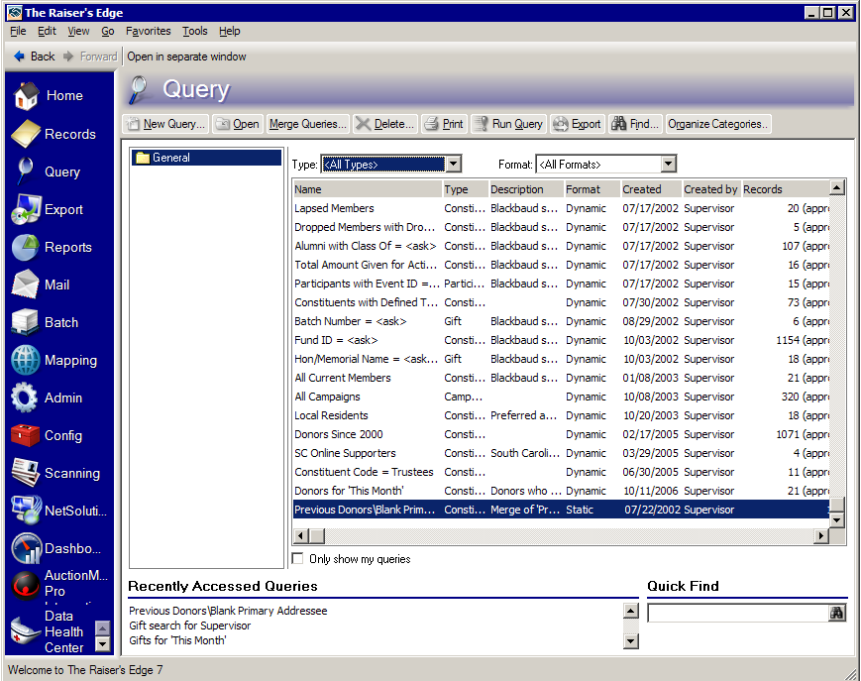
Note: If you want to update a merged query by changing the primary query or secondary query, or by changing the merge operator, select **Tools**, **Query Options** from the menu bar. Select the Record Processing tab and make the changes you need in the **Merged Queries** frame (this frame is only visible for merged query records). Click **OK** to return to the query tabs.

2. On the action bar, click **Open**. The Merged Query screen appears.
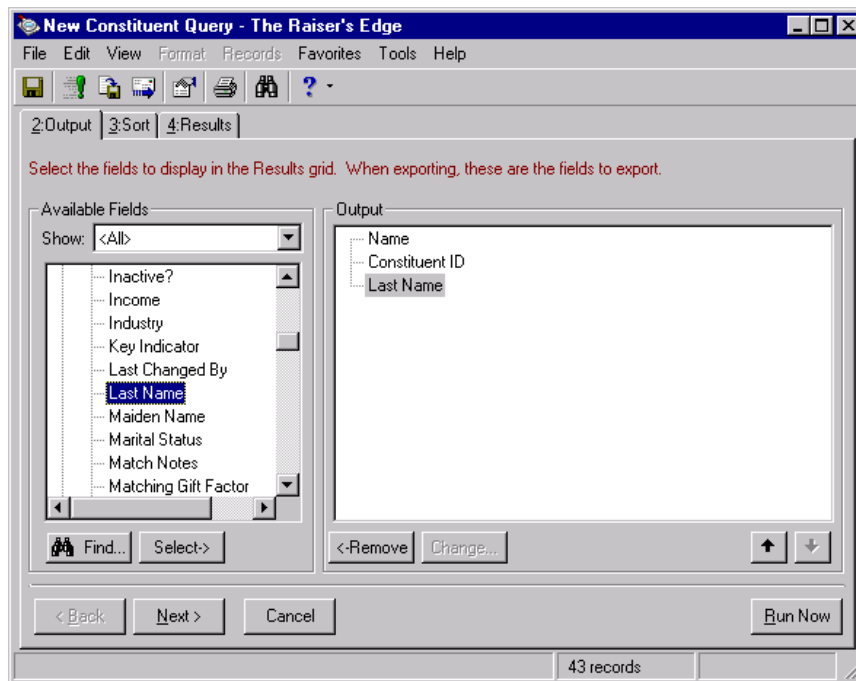
3. Click the Results tab. The list of results that appears is the original from when the merged query was initially run.
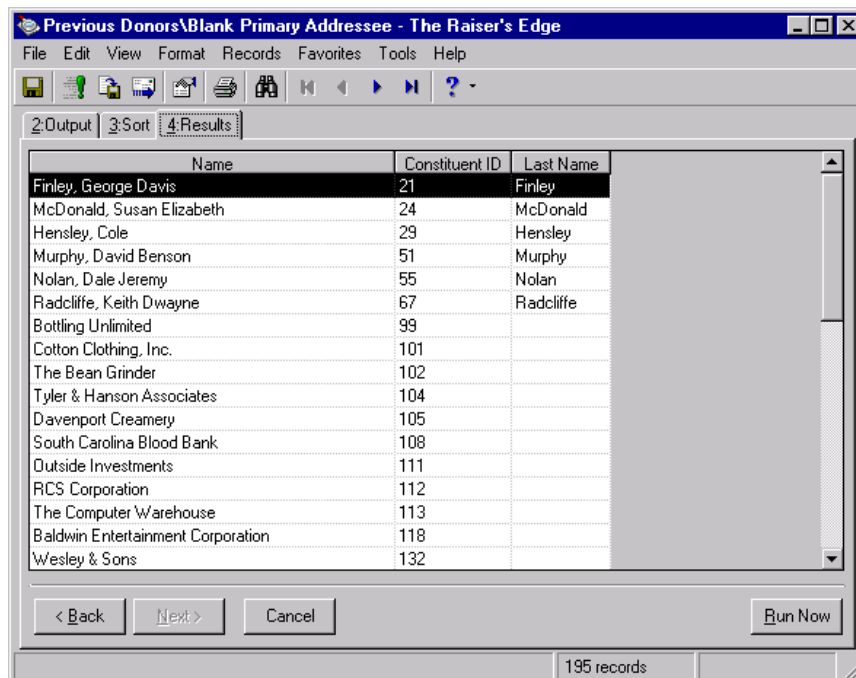
4. Click **Save**.

5. A confirmation message appears. The program searches the database for any new records meeting the criteria you defined and adds them to the query results.
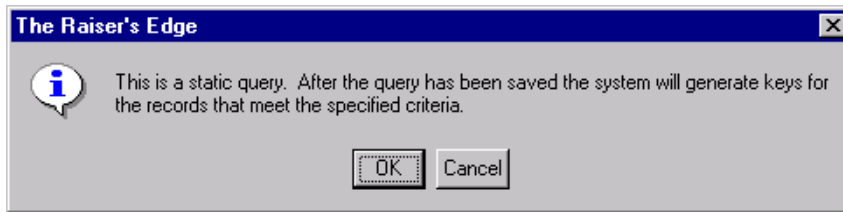
6. Click **OK**.

Note: Keys in a static query are equivalent to the number of records in a static query. This number is also visible at the bottom of the Results tab.

7. When the program finishes counting keys, or records in the query, another message appears telling you how many records the static query contains.
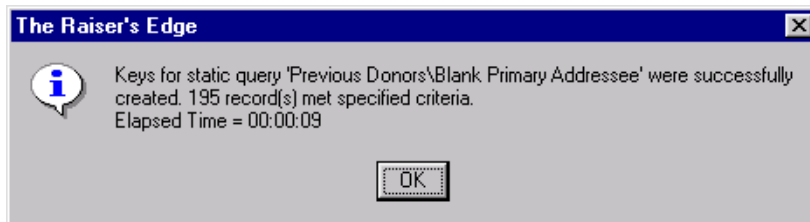
8. Click **OK**. The list remains the same.

Tip: You can also press **F5** on your keyboard to refresh.

9. From the menu bar, select **Records**, **Refresh** to refresh the merged static query.
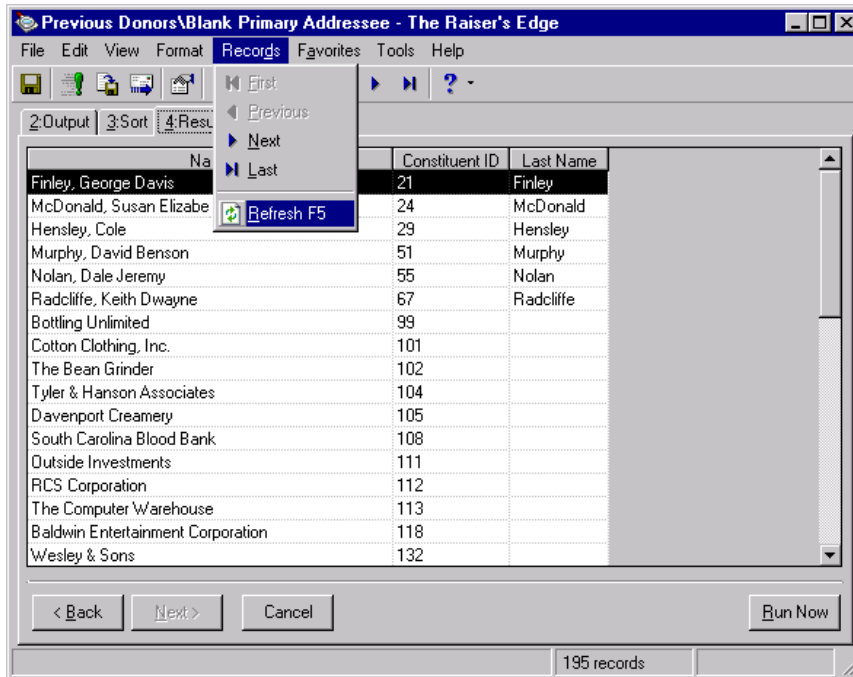
Note: The updated results in a static query save when you click **Save** on the toolbar or select **Records**, **Refresh** from the menu bar. If you select the Results tab or click **Run Query** on the toolbar, the static query updates, but the changes are not automatically saved.

The list updates to reflect the changes made in your database.
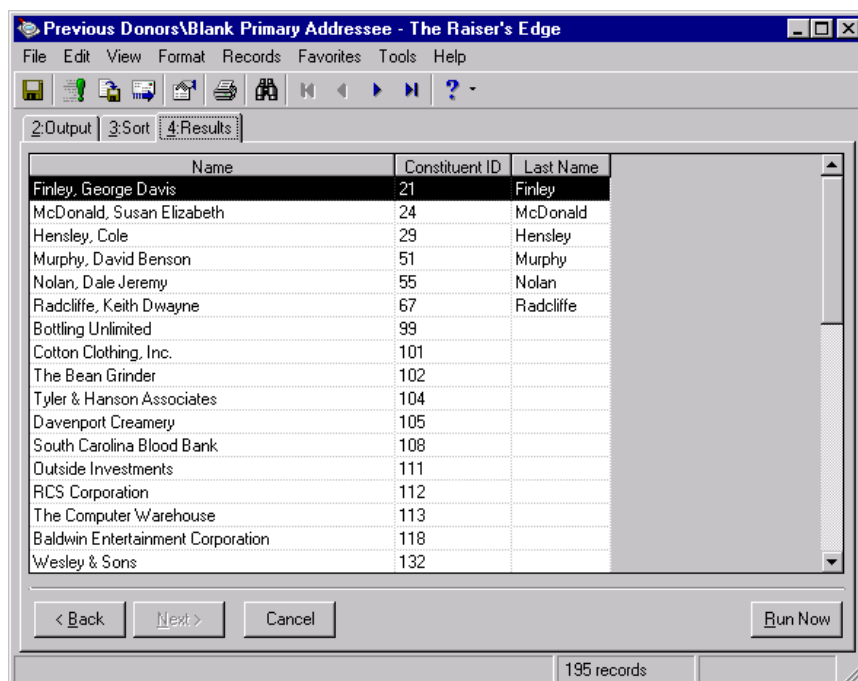
10. To close the refreshed, merged query, select **File**, **Close** from the menu bar.

Query Formatting

Once you create a query and produce the output, you may want to change the appearance of the results. You can easily assign alternate formatting options for the font size and style, column width, grid lines, and query headings. The formatting options discussed in this section are enhancements that affect only the appearance of the information you selected as output for the query.

You can also assign alternate formatting to certain criteria fields, but those formatting options are defined on the Query tab of the User Options screen. For more information about User Options, see "Query User Options" on page 13.

You can assign several formatting options to your query results.

Format Options

You can use 11 menu options to determine formatting for your query results. These options are accessed from the **Format** menu of the Results tab. From the Results tab, you can also access some **Format** menu options by using the right-click menu.
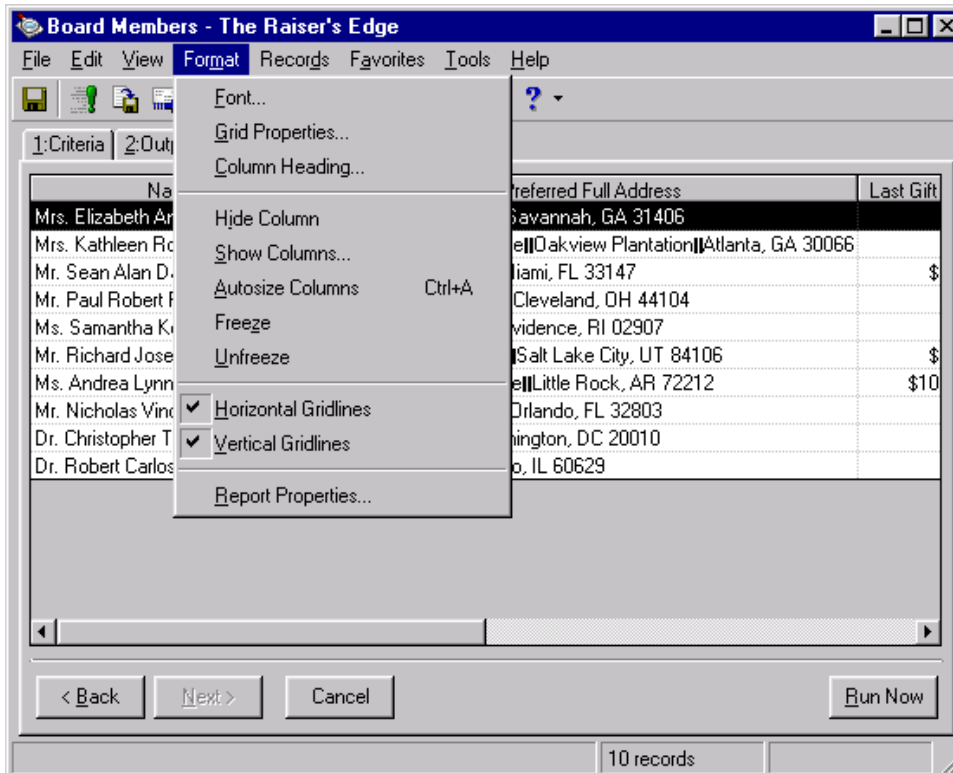
Font. Several font formatting options exist for fonts. You can change the font name, style, and size. You can define font formatting options for the information contained in the results grid and column headings, or you can choose to assign separate font options for the column headings.

Grid Properties. **Grid Properties** lets you determine the number of entries that should appear on a row. You can also use this menu option to determine if you want the program to automatically assign headings at the top of each column and determine the number of rows allocated for the heading.

Column Heading. This menu option lets you select a specific name for a column. The program automatically assigns a default column name depending on the output fields selected. This menu option is not available from the **Format** menu, only from the right-click menu.

Hide/Show Columns. You can choose to **Hide Columns** or **Show Columns** of information contained in your query results.

Autosize Columns. This function automatically sizes columns to accommodate the largest data field entry for that column.

> **Note**: **Format** menu options are available only from the Results tab of a query.

Freeze/Unfreeze. Freezing a column prevents it from being moved or scrolling off the page when you are viewing query results. All columns of information can be moved by clicking on the heading and dragging it to another spot.

Horizontal Gridlines. Horizontal gridlines run from left to right in between the rows of data fields. A check mark by the **Horizontal Gridlines** menu option indicates the gridlines will appear. To remove gridlines, select this menu option and the check mark disappears.

Vertical Gridlines. Vertical gridlines run from top to bottom between columns. A check mark by the **Vertical Gridlines** menu option indicates the gridlines will appear. To remove gridlines, select this menu option and the check mark disappears.

Report Properties. The **Report Properties** menu options let you define whether the query results print in landscape or portrait setting. You can also determine the heading or title for the query report and decide if you want to print the organization's name or date with the heading. These menu options also allow you to define information to include in a page footer.

▸ **Format query results**

Note: From the Results tab you can also access certain formatting menu options by right-clicking on the grid.

You can customize how your query results appear with *The Raiser's Edge* formatting menu options. These are extremely helpful if your query results are prepared as reports or if certain information on the query results should be highlighted or hidden. The following example shows only how to set a few formatting menu options, but the procedure is basically the same for the remaining menu options.

Scenario: The Development Director of your organization wants you to format the query results of the Tribute Records query to show only the constituent name and tribute type. You are presenting this information to the Board of Directors and want to change the heading font style and size.

1. From the Tribute Records query record, select the Results tab. For more information about accessing the Query page, see "Navigate in Query" on page 5. For more information about opening queries, see "Access a Query" on page 9.
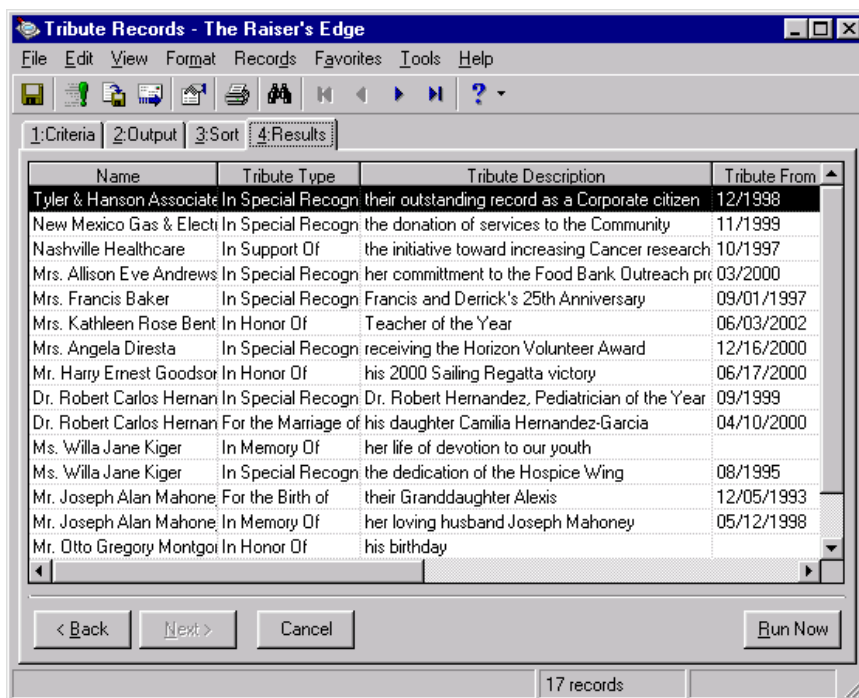
Note: All alternate query formatting is saved and replaces the formatting of the original query. If you refresh the query, the formatting remains the same.

2. To show only the constituent name and tribute type, from the menu bar, select **Format**, **Show Columns**. The Show screen appears with all the columns shown on the query Results tab checked on.
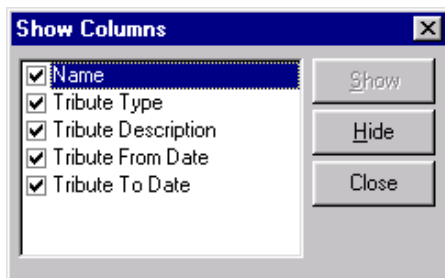
3. To hide the **Tribute Description, Tribute From Date**, and **Tribute To Date** columns, unmark the checkboxes to the left of these fields.

4. Click **Close**. You return to the Results tab of the query record. Only the name and tribute type appear in the grid.

5. To change the heading font size and style, from the menu bar, select **Format**, **Font**. The Font screen appears.
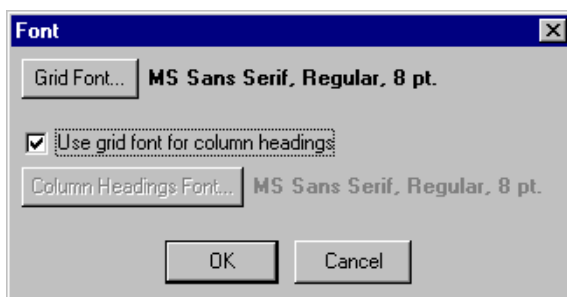
6. To access the column, heading, and font options, unmark the **Use grid font for column headings** checkbox. The **Column Heading Font** button is now enabled.

7. Click **Columns Heading Font** on the Font screen. A second Font screen appears so you can select the font, font style, and size you want for your heading.
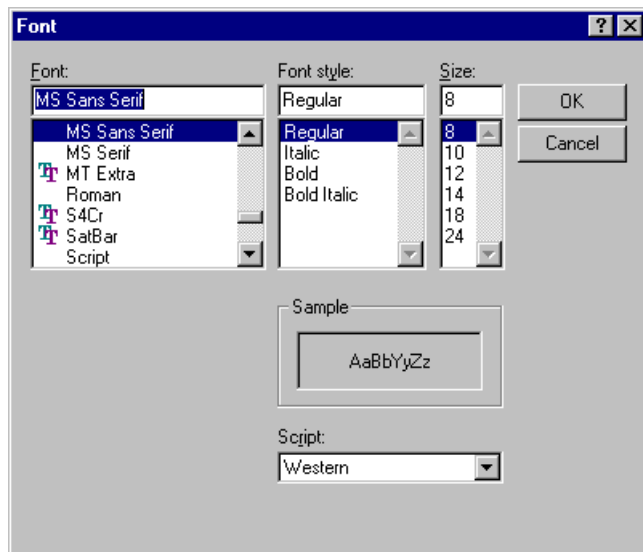
8. In the **Font** box, select "MS Sans Serif". Select the font size and style you want for your headings.

9. In the **Font style** box, select "Bold Italic".

10. In the **Size** box, select "12".

Note: Use the **Sample** box to view the font format for your Heading on the query Results tab.

11. In the **Script** field, leave the default "Western".
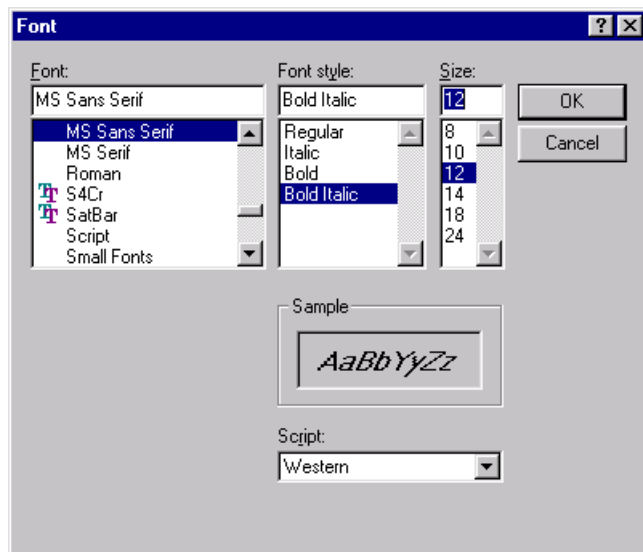
12. Click **OK**. You return to the Results tab. Notice the differences in your font, style, and size.
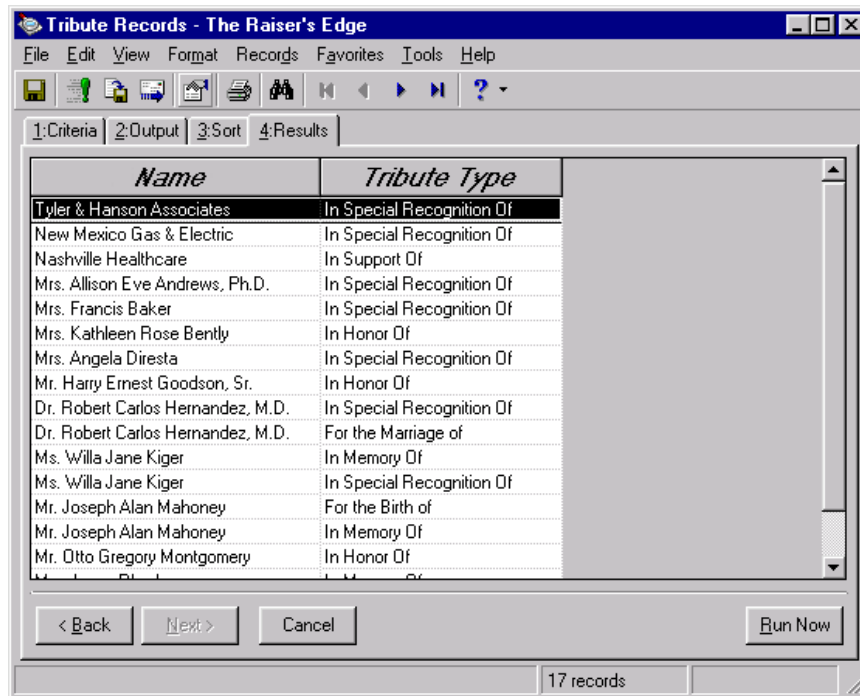
13. To close the query record, select **File**, **Close** from the menu bar.

Eliminate Duplicates From a Query

With ***The Raiser's Edge***, there are multiple ways to avoid displaying duplicate information in query results. When you first create the query, make sure to use the correct query type. For example, you create a gift query. One constituent has five gifts in the query. All five gifts appear in query results because they are not duplicates and each gift is a separate record. If you want to query on an entire constituent record, you need to create a constituent query. For more information about query types, see "Query Types" on page 20.

To eliminate as many duplicates in your query as possible, follow these steps.

❑ Limit the number of output fields in the query. Specifically, limit the number of one-to-many fields, such as **Gift Type** or **Home Phone Number**. For example, if you place **Home Phone Number** in the output, and John has three phone numbers, each number appears on a separate row in the query results. However, when you save the query and use it to run labels, John's name appears only once.

❑ Increase the number of filters in the query. For example, when you filter **Phone Number**, also filter **Phone Type**. This limits the phone number to a specific type.

❑ Select **Tools**, **Query Options** from the menu bar. Mark the **Suppress duplicate rows** checkbox and then save and run the query. Use this option if your query does not contain one-to-many fields.

▶ **Suppress duplicate records**

When you use the **Suppress duplicate rows** checkbox, duplicate rows may still appear for one-to-many fields in query results. For example, if you select to output **Phone Number** in the results, the rows do not necessarily contain the same data. Therefore, the rows are not considered duplicates. Using this example, one row for a constituent could contain the home phone number. The second row for the constituent could contain the cell phone number.

To eliminate duplicates, use the query in other functions, such as *Mail* or *Reports*. You can also export the query to Microsoft *Excel* to delete or hide duplicates.

1. From the toolbar of a query record screen, select **Tools**, **Query Options**. For more information about accessing the Query page, see "Navigate in Query" on page 5. For more information about opening queries, see "Access a Query" on page 9.
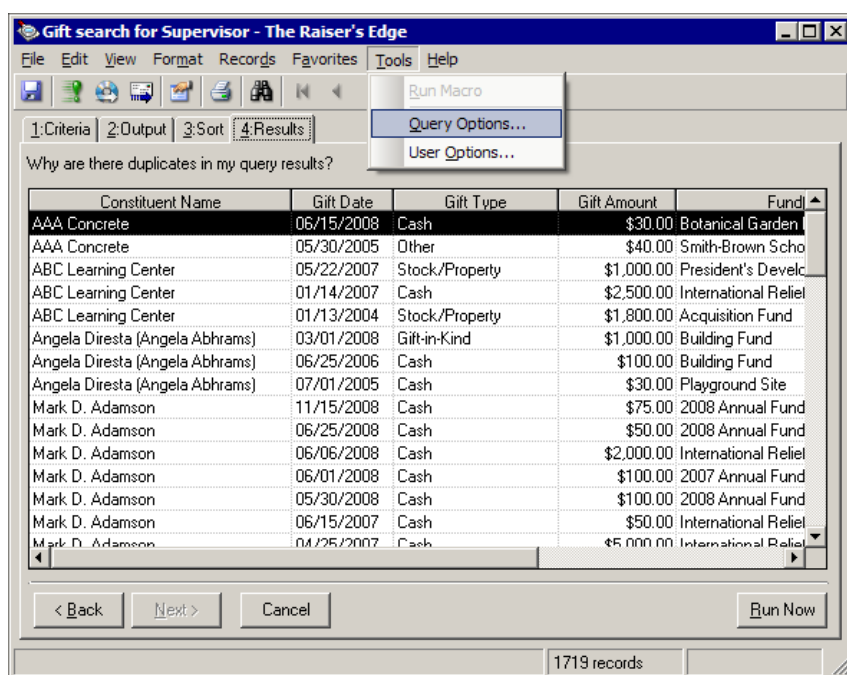
The Query Options screen appears.

2. Select the Record Processing tab.
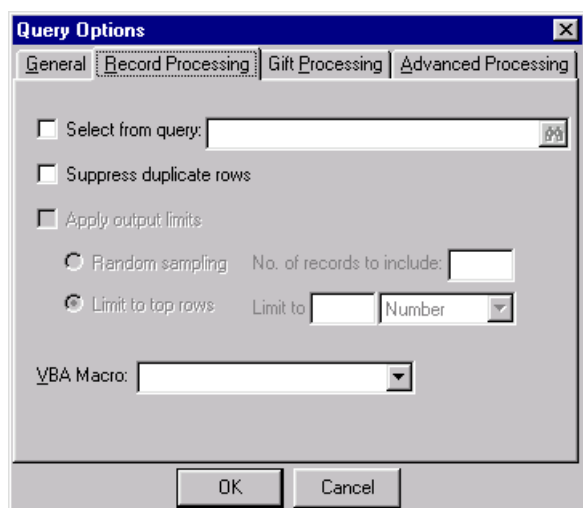
3. Mark the **Suppress duplicate rows** checkbox.
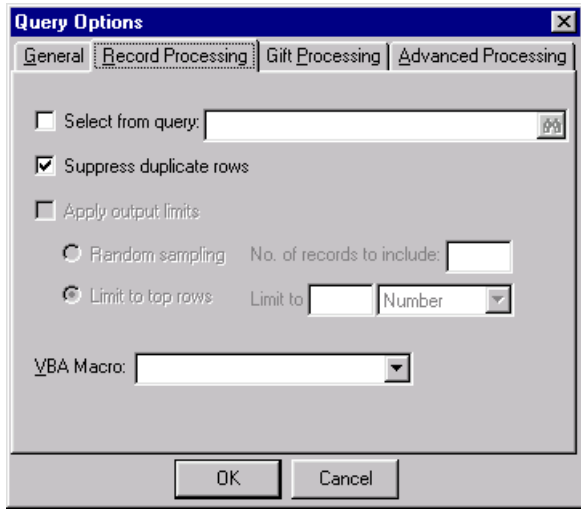
4. Click **OK**. You return to the query record screen.
5. Select your criteria, output, and sort fields and view the results.
6. To close the query record, select **File**, **Close** from the menu bar.

Use Output Queries as a Source for a New Query

You can create queries to group records you used in program functions, such as *Mail* and *Reports*. For example, if you are creating labels for the participants of a conference, you can create an output query of the records you use in this function. An output query, in this case, is simply a query of all records for which a label was printed.

Creating output queries is recommended, especially when you are performing functions such as importing, globally adding constituents, and posting gifts to *General Ledger* which can potentially change your entire database. You can use the output queries generated in *Reports* or *Batch* to verify the results of your process or to limit the scope of additional functions to the group of records included in your output query. For example, you can import into your database the information for new constituents and create an output query with these records. Later on, you can use the output query to send this group of new constituents letters, or you can use this group as a source for another query.

‣ **Select records from an existing query**
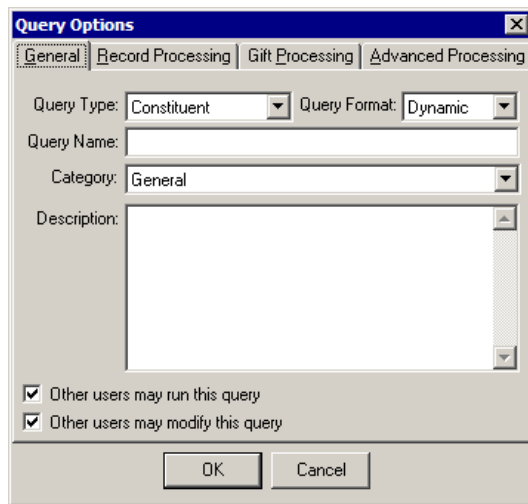
You can use an output query as the source for a new query. Selecting records from a previously created query can reduce the time it takes the program to generate results. It also limits the records used to the ones included in the query. You can select records from a dynamic or static query, but the records must be the same type. For more information about query types, refer to "Query Types" on page 20.

> *Scenario:* The Development Director for your organization previously asked you to generate a list of volunteers for your national organization. You created an output query to group these records, which you named Volunteers. Now, your Director asks you to generate a list of all volunteers who gave gifts of $50 or more, for a special mailing. To save time and effort, you want to create a new query from the existing Volunteers query.

1. From the Query page, on the action bar, click **New Query**. The New Query screen appears. For more information about accessing the Query page, see "Navigate in Query" on page 5. For more information about creating a new query, see "Create a constituent query" on page 28.
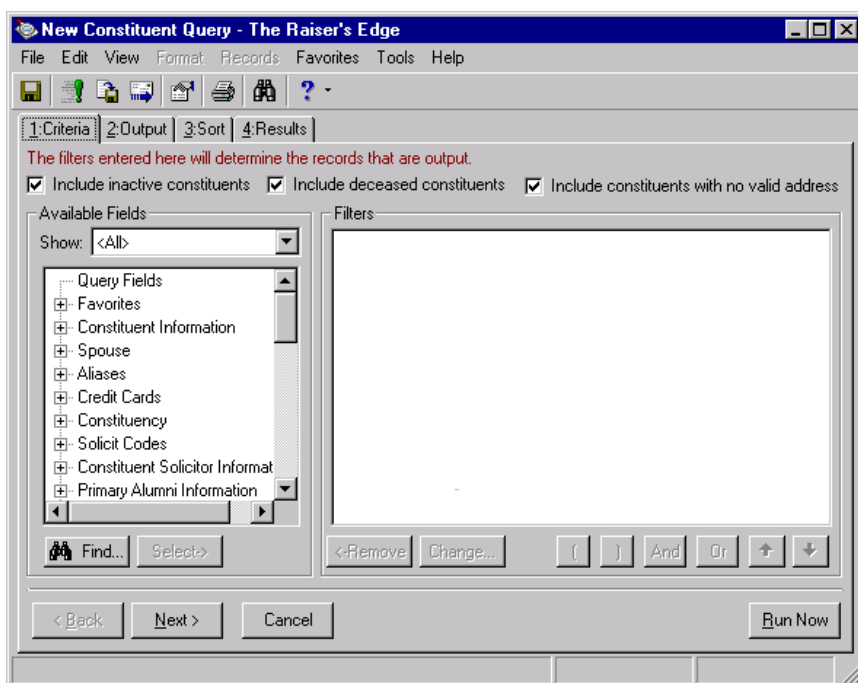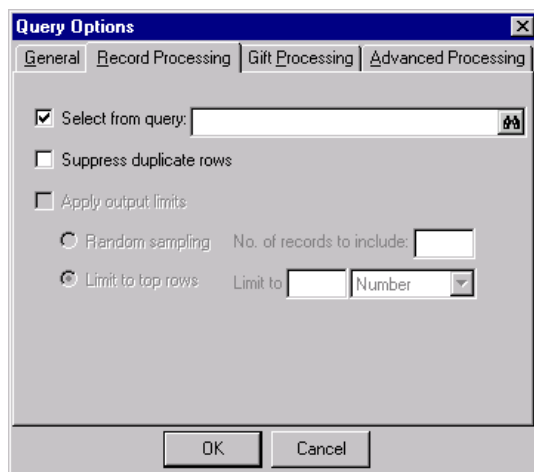
2. From the menu bar of the new query record, select **Tools**, **Query Options**. The Query Options screen appears.

3. Select the Record Processing tab.

Note: You can only select the same type of query as you want to create. For example, a constituent query can only serve as a source to create another constituent query.

4. Mark the **Select from query** checkbox and enter "Volunteers". You can also click the binoculars to access a list of available queries to search for your query.
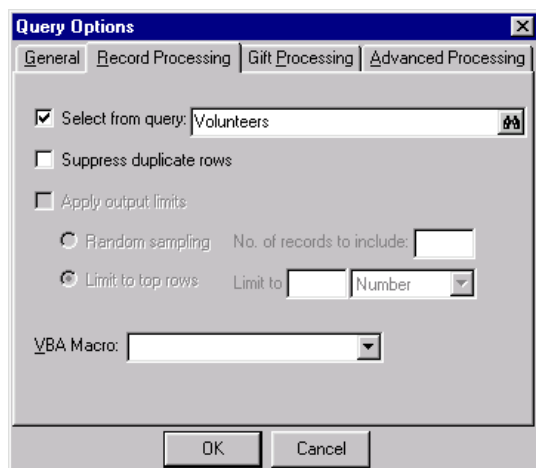
Note: If you just want to open an output query, do this from the Query page. When you close and save the output query, the Save Query As screen appears. The name you selected when you originally created the output query (in another program function such as *Mail* or *Reports*) defaults in the **Query name** field. You can keep the same output query name or rename the output query.

5. Click **OK**. You return to the new query record.

6. On the Criteria tab for this new query, in the **Available Fields** box, under Gifts, select **Gift Amount**. The Edit Field Criteria screen appears.

   a. In the **Operator** field, select "greater than".

   b. In the **Value** field, enter $50.
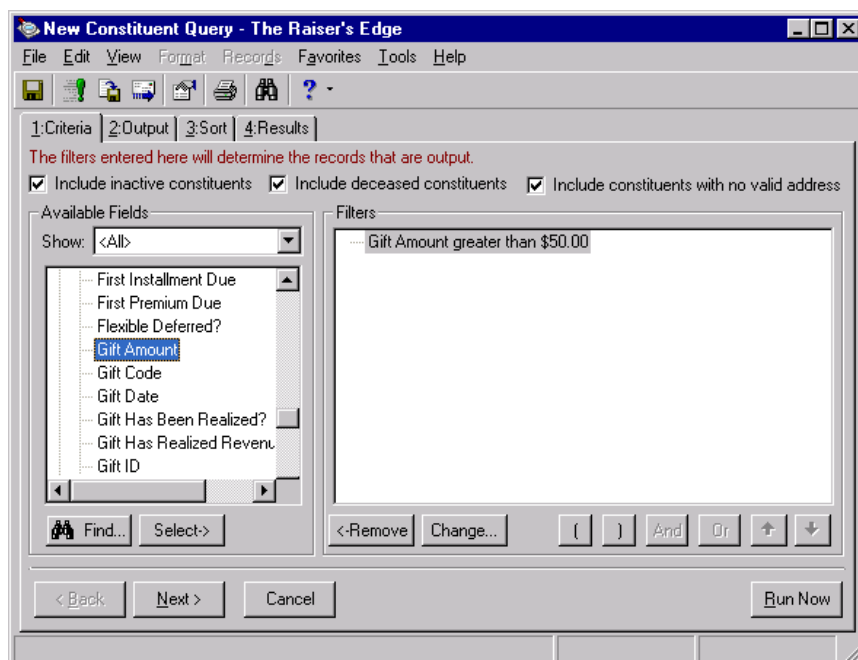
Tip: You can set your User Options to automatically include all criteria and sort fields on the Output tab. For more information, see "Query User Options" on page 13.

7. On the Output tab, under Constituent Information, select **Name**. To move it to the **Output** box, click **Select**.

    Repeat this step to select **Job Assignment**, **Department**, and **Start Date** under Volunteer, Assignments. **Gift Amount** automatically defaults in the **Output** box.

8. In the **Output** box, use the up and down arrows to change the order of the output fields. The results can appear in any order.
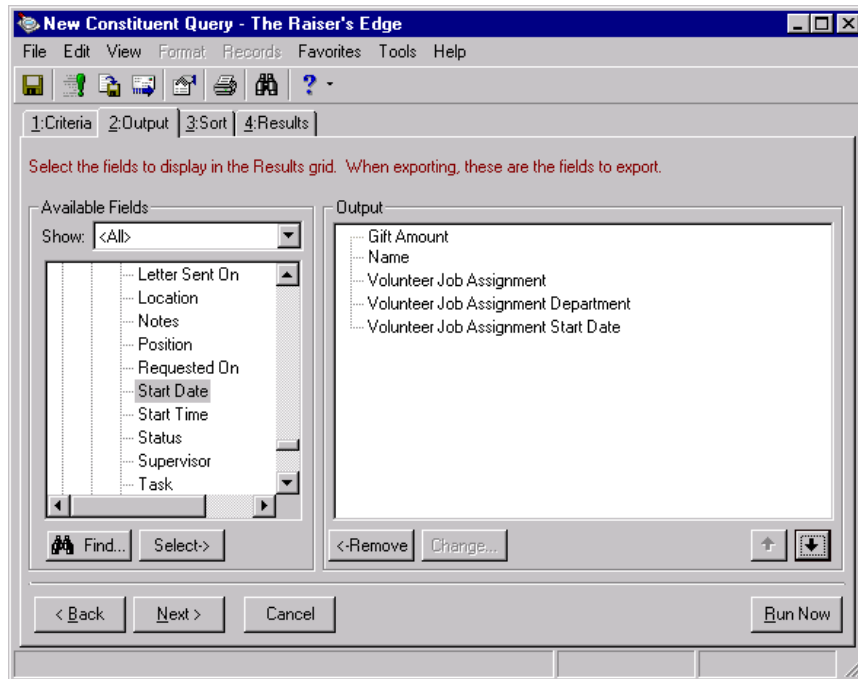
9. Select the Sort tab. In the **Available Fields** box, highlight **Last Name** and click **Select** to move it to the **Sort** box. For more information about selecting sort fields, see "Create a constituent query" on page 28.
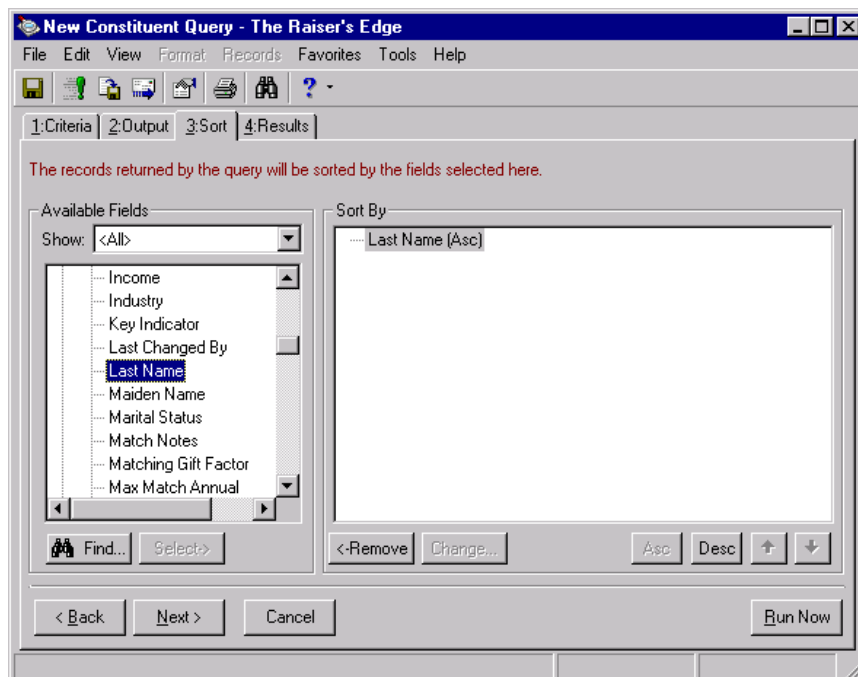
10. Select the Results tab. The query automatically runs and the results appear. The query output is limited to records found in the original report output query.

11. To close the query record, select **File**, **Close** from the menu bar.

Delete Multiple Queries

You can delete a group of queries from your database. We recommend you make a backup copy of your database before you delete any records. We also suggest you print a control report of all queries you decide to delete. The control report lists all filtering criteria used and the output and sort fields selected. This can be extremely helpful if you decide to recreate the query.

‣ **Delete multiple queries**

Note: You cannot delete queries that are part of an action track or business rule.

In *The Raiser's Edge* you can delete a group of queries. We recommend you use the **Query type** and **Query format** fields and the **Only show my queries** checkbox to determine which queries are available for deletion. Using these filters prevents you from unwittingly deleting queries you did not create. Queries associated with business rules or action tracks cannot be deleted and will be excluded from the delete multiple queries task.

Note: You can also delete multiple queries by right-clicking on the Query page and selecting **Delete Multiple Queries**.

1. From the menu bar of the Query page, select **Tools**, **Delete Multiple Queries**. The Delete Multiple Queries screen appears. For more information about accessing the Query page, see "Navigate in Query" on page 5.
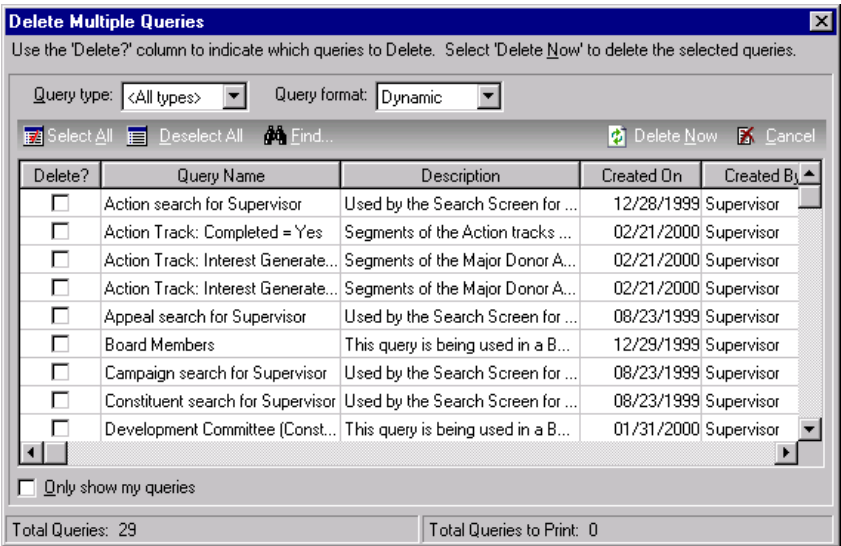
Warning: We recommend you back up your system before deleting any queries. Deleted queries can be restored only from a backup of your system.

2. Beside each of the queries you want to delete, mark the **Delete?** checkbox. If you want to delete all queries in the grid, you can mark all the **Delete?** checkboxes by clicking **Select All** on the action bar.

3. To delete all queries with the **Delete?** checkbox marked, on the action bar, click **Delete Now**. A warning message appears.
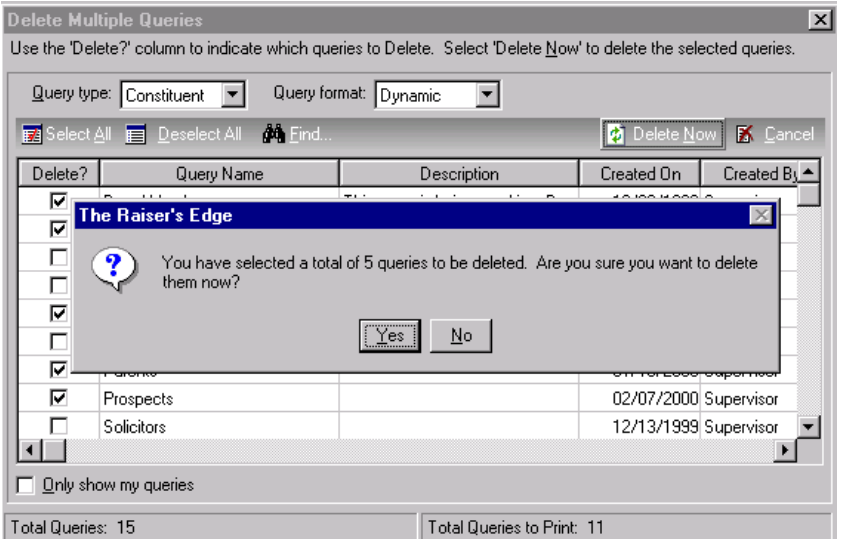
4. Click **Yes** to continue.

5. Once the query deletion process is complete, a screen detailing the number of records processed and the number of exceptions appears.
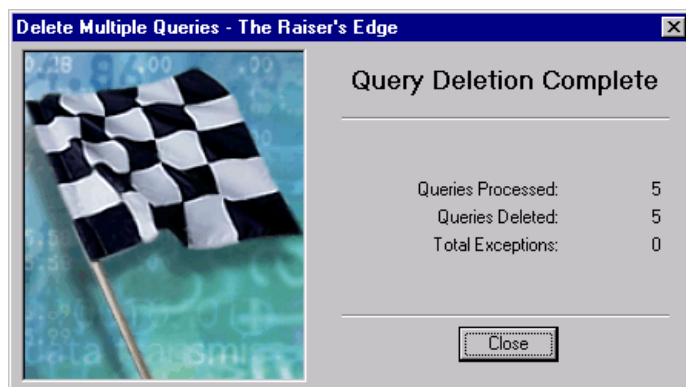
6. Click **Close**. You return to the Delete Multiple Queries screen.

7. Click **Cancel** to return to the Query page.

Export a Query

> **Note**: Even though you can export information from *Query*, for full export functionality we recommend you use *Export*.

Exporting is how you send (export) selected information from your database to another software application. You can export the results of any query to a word processor, spreadsheet, or reports program. You can use many export formats. Export formats determine the way the data extracted from your query results appears and with which software application it is used. Some export formats include: Microsoft *Excel*, *dBase*, and *Lotus 1-2-3*.

When you export information from the Results tab of a query, what you see is what you get. In other words, the exported information is limited to how it appears in the query results. We recommend using *Export* for full exporting capabilities. For example, you create a constituent query for those who donated $5,000 or more, and you select the output constituent name, gift date, and gift amount. If David Murphy donates over $5,000 on two separate occasions, you see results for each gift given. If you export the query information through *Export*, you can manipulate the results to get the name listed only once, with each gift and gift date. For more information about exporting, refer to the Export chapter of this book.

▶ **Export a query**

> **Warning**: When you export the Results tab, you can use only the data generated from your output field choices. If you create a query and use the query in *Export*, you have access to all information contained in the records.

Exporting a query's results can be useful if you want to use only the information generated from your output field choices. For example, you can use data extracted from a query's results to create a spreadsheet for further analysis. You can export information within the results grid or the entire display of information from the Results tab. You can also export directly to Microsoft *Excel,* if you use that program.

1. From the Results tab of a query record, click **Export** on the toolbar. The Export screen appears. For information about opening a query record, see "Open a query record" on page 9.
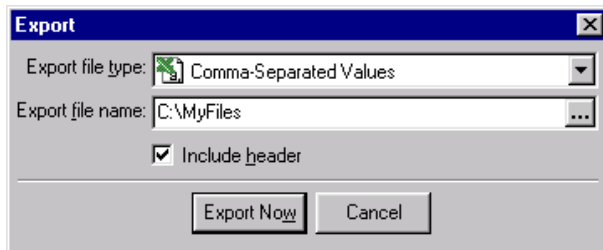
Note: You can also export a query from the Query page by highlighting the query you want to export and clicking **Export** on the action bar.

If the selected query contains any filter fields with the "<ask>" operator, the Ask at Runtime wizard appears. Once you select all criteria, the Results tab of the query displays and the Export screen appears.

2. In the **Export file type** field, select the type of data in which you want your file to export. For more information about export file types, see "Export Formats" on page 140.

Note: Selecting certain file types in the **Export file type** field enables the **Include header** checkbox. If you mark this checkbox, a header of the export field names are included in your data file.

3. In the **Export file name** field, assign a location and name your data file. For example, you may want to save this to C:\MyFiles or another folder you prefer. After you assign the data file to a location, name the data file "Export.csv" in the **Export file name** field.
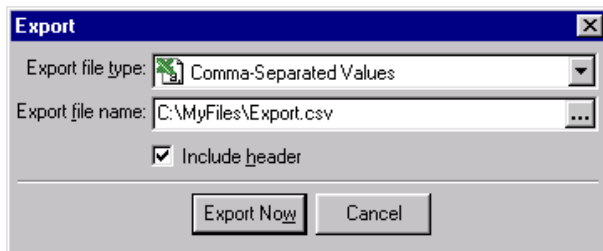
Tip: You can click the **Browse** button to easily name and locate your export file.

4. Click **Export Now**. If the file already exists, a message appears asking if you want to overwrite that file with the new version.

5. To overwrite the existing file, click **Yes**.

When *Query* finishes exporting, a message appears informing you that your export files have been created.
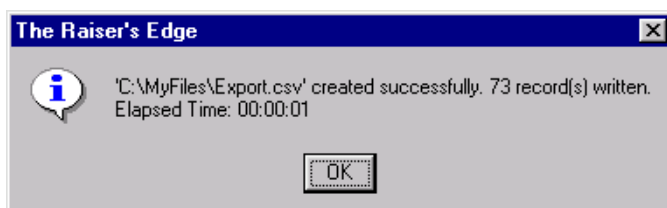
6. Click **OK**. You return to the Results tab.

7. From the menu bar, select **File**, **Close** to close the query record.

Send a Query's Results as Electronic Mail

You can share information you grouped in *Query* with other users through electronic mail. You can send the results of a query to another user for further analysis or to use in other tasks. When you email query information, you perform two tasks: you change the format in which the information appears on the Results tab and you send it to another individual. Before you send an email of your query results to another user, you must first assign it a format. The format determines the appearance of the information and with which software applications it can be used. Sending an email of your query results can be particularly useful for situations in which you need to quickly reference the query results, but do not need to access or edit the query record.

▶ **Send a query's result as email**

When you send an email of a query's results, you create a data file with the information you want to send. You then assign a format (*dBase III*, *Lotus 1-2-3*, Microsoft *Excel*) to the information in the data file. Once you assign your format, another user can access the information without using ***The Raiser's Edge*** functions.

1. From the query record screen, on the toolbar click **Send to**. The Export screen appears. For information about opening a query record, see "Open a query record" on page 9.
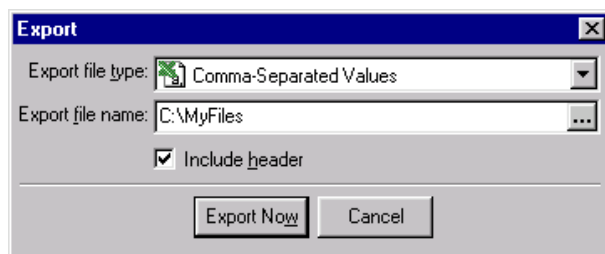
> **Note**: Selecting certain file types in the **Export file type** field enables the **Include header** checkbox. If you mark this checkbox, a header of the export field names are included in your data file.

2. In the **Export file type** field, select the type of data in which you want your file once you send the email. For more information about export file types, see "Export Formats" on page 140.

3. In the **Export file name** field, assign a location and name your data file. For example, you may want to save this to C:\MyFiles or another folder you prefer. After you assign the data file to a location, name the data file "Export.csv" in the **Export file name** field.
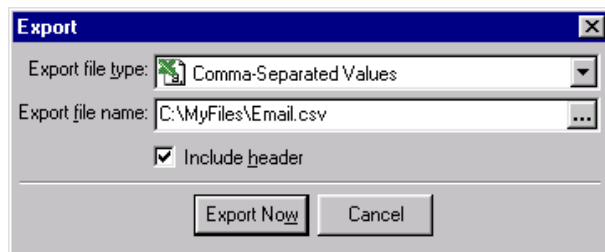
> **Tip**: You can click the ellipsis button to easily name and locate your export file.

4. Click **Export Now**. The program processes the information in the query and exports it to the data file.

5. The email message screen appears with the query results in the data format you specified as an attachment.
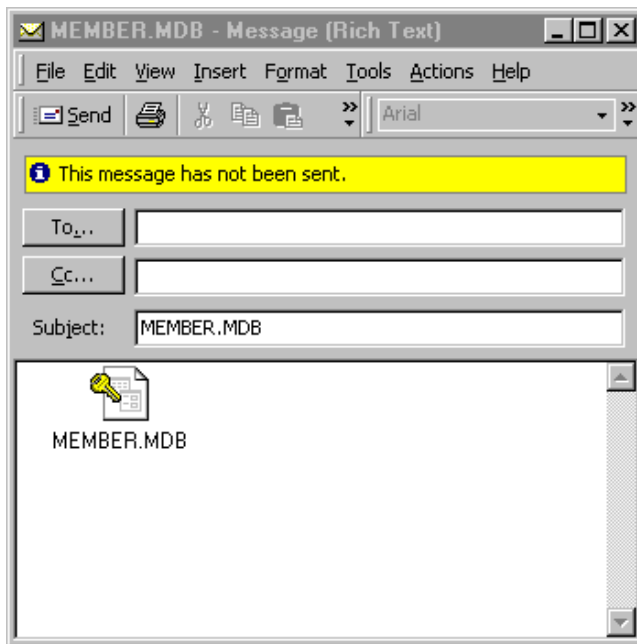
6. Complete the email message and send it.

Query Options

Query options summarize the information that describes a query's characteristics and lets you decide specific processing options for your query. For example, if you create a gift query and want to make sure you soft credit both the donor and the recipient, you can establish that preference in the Query Options screen. The Query Options screen is composed of four tabs: the General tab, Record Processing tab, Gift Processing tab, and Advanced Processing tab. On the General tab, you can define the query type and format, assign a name and description, and define the access/editing rights for the query. The Records Processing tab lets you create a query using records found in an existing query, apply output limits to your query, and suppress duplicate rows of information in the query results. On the Gift Processing tab, you can determine how to credit soft credits and matching gifts. On the Advanced Processing tab, you can select the optimal processing mode for queries with a large number of attributes or code table fields.

▸ **Change query options**

You can edit the description of a query, allow access/edits rights to other users, use a different query as a source, and limit the output of a query for special purposes. Query options can often save time when you want to use an existing query, but need to modify some of the features. For example, if you want one of your co-workers to have access to a query you created, you can mark the **Other users may run this query** and **Other users may modify this query** checkboxes on the Query Options screen to redefine access/editing rights for that query.

> *Scenario:* You are creating a static constituent query with gift information and want to make sure access to this query is given to other co-workers. You do not want duplicates in the results and want your results to include only the top ten percent of constituents meeting your criteria. In this query, all matching gifts are credited to both the donor and the matching gift company.
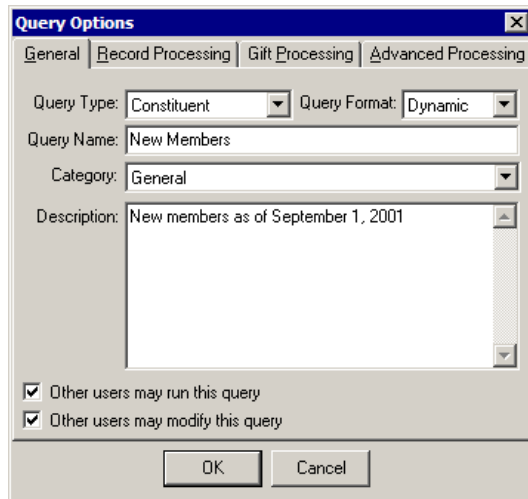
1. From the menu bar of a new query record screen, select **Tools**, **Query Options**. The Query Options screen appears. For more information about accessing the Query page, see "Navigate in Query" on page 5.

2. Select the General tab. For example, to specify you want a static query, select "Static" in the **Query format** field.

Note: To rename an existing query, select **Tools**, **User Options** from the menu bar. In the **Query Name** field, delete the old name and enter the new name. To save the changes, click **OK**.
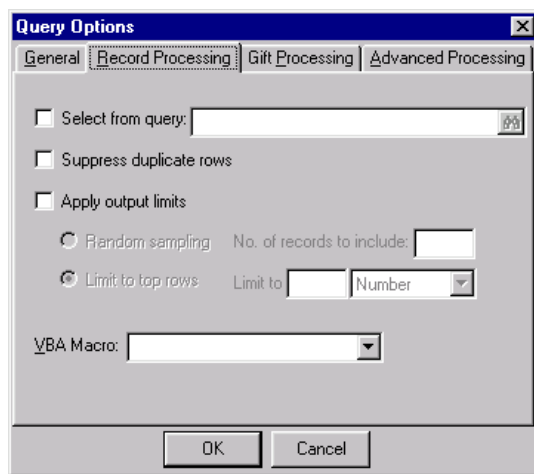
3. If you select query options for an existing query, the name defaults automatically in the **Query Name** field. Because this is a new query, you can enter a query name on the General tab.

4. If you select query options for an existing query, the category of the query automatically defaults in the **Category** field. Because this is a new query, select the category to store the category.

5. If you select query options for an existing query, the description of the query automatically defaults in the **Description** field. Because this is a new query, enter a description on the General tab.

6. To authorize other users to run your query, mark **Other users may execute this query**.

7. To authorize other users to change your query, mark **Other users may modify this query**.

8. Select the Record Processing tab.

Warning: You can apply output limits to static queries only.

9. To suppress duplicate rows in the query results, mark **Suppress duplicate rows**.

10. To limit your output to the top ten percent, mark **Apply output limits**. This activates the options on the lower part of the screen.

Note: If you select **Tools**, **Query Options** from the menu bar for a merged query, a **Merged Queries** frame appears on the Record Processing tab. You can update a merged query by changing the primary query or secondary query, or by changing the merge operator in this frame. For more information about merging queries, see "Merge Queries" on page 90.
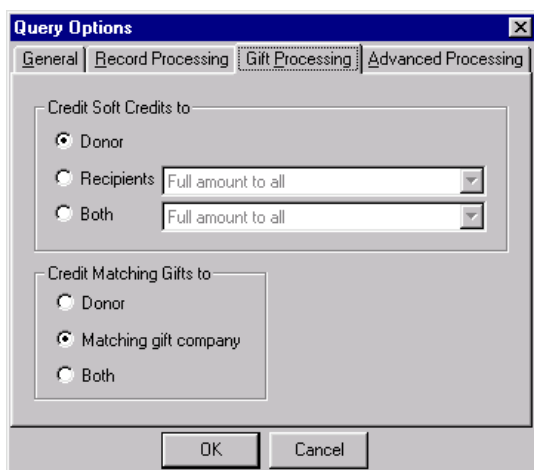
11. Select **Limit to top rows**. For example, in the **Limit to** field, enter "10" and select "Percent".

You can select **Random sampling** to calculate the number of records you want to use in a query. For example, your constituent query contains 600 records. You want to send an appeal randomly to 300 of these constituents. In the **No. of records to include** field, enter "300". Your query results still display 600 constituent records, but only 300 records receive the appeal when you use the query in *Mail*.

12. Select the Gift Processing tab.

13. To credit soft credits to both the donor and the recipient, select **Both** on the **Credit Soft Credits to** frame. In the field beside **Both**, select "Full amount to all".

14. To credit matching gifts to both the donor and the matching gift company, select **Both** on the **Credit Matching Gifts to** frame.

15. Select the Advanced Processing tab.

Warning: If the output of your query contains many attributes or many code table fields, using an alternate SQL statement *may* increase the processing speed of the query.

16. Mark **Use alternate SQL method for code table fields** to optimize processing time if you select many code table fields on the Output tab.

17. Mark **Use alternate SQL method for multiple attributes** to optimize processing if you select many attributes on the Output tab.

18. Click **OK**. You return to the new query record screen.

19. Select your criteria, output and sort fields and view the results. For more information about selecting criteria, output, or sort fields, refer to "Create a constituent query" on page 28.

Giving Score Query

Giving Score queries allow you to create lists of your constituents to be used in other processes throughout the program, such as in mailings. The lists you create are based on the Giving Score ratings your constituents receive when your data is scored for the Giving Score through the Data Health Center, or when you manually assign a Giving Score rating. For example, if you start a campaign and want to send targeted mailings to your best donors, you can use a Giving Score query to create a list of all of your constituents who have a rating of VIP, and use that list for the mailing.

Note: For information about the Giving Score, and how to submit your data to be scored, see the *Data Health Center Guide*.

A Giving Score query record is slightly different from other query types. Rather than containing four tabs from which to build your query and view its results, a Giving Score query record uses a list concept to create your query in one step, and then display your results on a single page. For example, you can create a Giving Score query that produces a list off all of constituents with a Giving Score rating of VIP.

Create a Giving Score Query

Giving Score queries are unique from other query types. Rather than set criteria and output fields, use operators, and choose your sorting, to create a Giving Score query, you only need to select which Giving Score ratings you want to appear in your query results.

▸ **Create a Giving Score query**
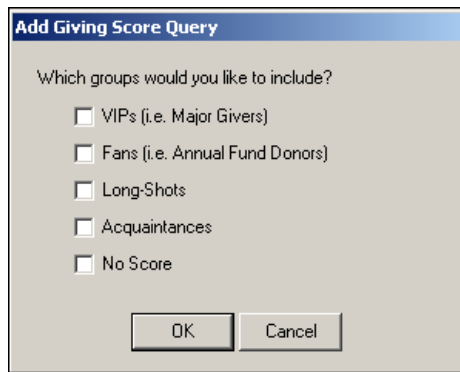
1. From the Query page, on the action bar, click **New Query**. The New Query screen appears. For more information about accessing a Query page, see "Navigate in Query" on page 5.
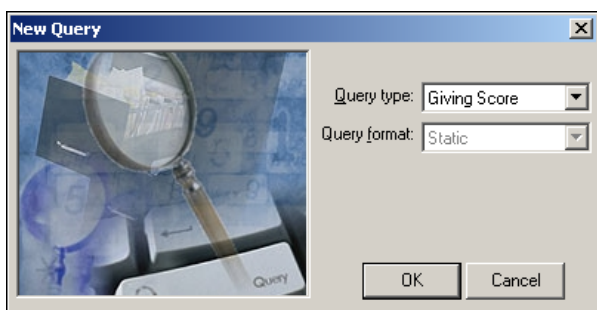
2. In the **Query type** field, select **Giving Score**.

Note: You cannot edit the query format. All Giving Score queries are static.

3. Click **OK**. The Add Giving Score Query screen appears.
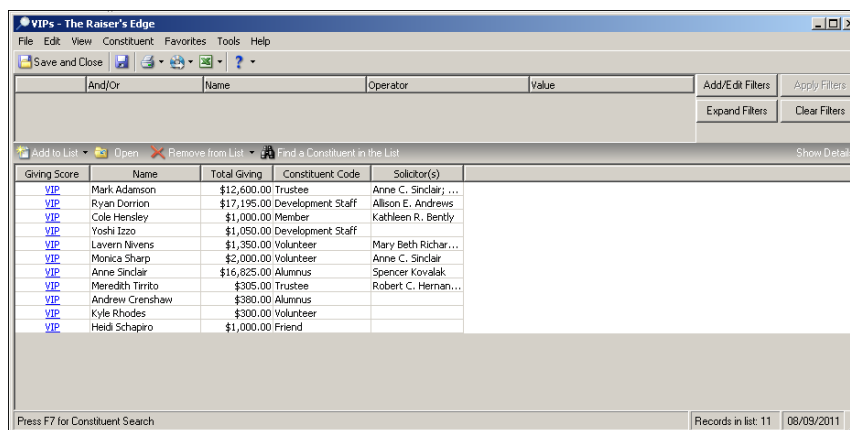
4. Select the Giving Score ratings you would like to include in the results of your query.

5. Click **OK**. The query runs, and the results appear.

To display additional information about constituents in the results list, such as gift information, recent actions, and notes, select a constituent and click **Show Details** on the action bar.

Note: In the details section, you can view recent giving history and *WealthPoint* results for the selected constituent. For information about how to view giving history, see the *Summaries Guide*. For information about *WealthPoint*, see the *Web Services Installation and Set Up Guide*.

From the list of recent actions, you can create a new action, open an existing action, or delete an action. For information about actions, see the *Constituent Guide*.

You can also view recent notes for the selected constituent, as well as create a new note, open an existing note, or delete a note. For information about notes, see the *Constituents Guide*.

Giving Score Query Record Actions

After you run a Giving Score query, there are number of actions you can complete to customize your list and manage constituents. For example, you can manually add or remove constituents to a Giving Score query results list, find a specific constituent in the list, and assign a solicitor to a constituent in the list.

Find a Constituent in the List

The **Find** button is available in many areas of the program to help you locate specific fields or items from a list. It is particularly useful in saving you time scrolling through lists with so many entries that all are not visible at the same time in the box or grid. For example, you can click **Find a Constituent in the List** on a Giving Score query record to find a specific constituent in your results. When you click the **Find** button, the Find screen appears so you can define the search for a field or other item.

Note: To open a constituent record, select a constituent in the list and click **Open** on the action bar. The constituent record appears.

▶ **Find a constituent in a Giving Score query results list**

1. On a Giving Score query record, click **Find a Constituent in the List** on the action bar. The Find screen appears.

2. In the **Field** field, select the column of the list you would like to search. For example, you can select **Name** to search for the constituent by name, or select **Constituent Code** to search for all constituents who have a specific constituent code.

3. In the **Find what** field, enter the name of the entry you want to find. If you are unsure of the spelling of the field for which you are searching, you can substitute the wildcard character ? for part, or the character * for all of the entry.

4. In the **Match** field, select whether you want your entry in the **Find what** field to match: Any part of field, Whole field, or Start of field.

5. If you want the search to match any capitalization in the field name, select **Match case**.

6. When you click the **Find First** button, the first match that meets your search criteria is highlighted in the query results list.

7. Click the **Find Next** button to find any additional entries that meet your criteria.

8. After you locate the entry you want to find, click **Close** to exit the Find screen. You return to the query record and the last field found is highlighted.

Giving Score Query Filters

If you want to find specific information in a Giving Score query results list, you can add filters to narrow it down. For example, you can add filters to your VIP list to only display VIPs who have a total giving of more than $10,000.

> **Note**: To calculate totals, the **Total Giving** column includes gifts and pledges with a payment method of cash or stock/property.

To add filters to a Giving Score query list, click **Add/Edit Filters**. The Filters screen appears. Use the list of available fields to locate the filters you would like to apply, and then add them to the **Filters** grid. After you add all your filters, click **OK**. You return to the Giving Score query record. Click **Apply Filters** to update the list according to the filters you added.

For more information about how to select filter criteria for a Giving Score query list, see "Create a constituent query" on page 28.

> **Tip**: If you have multiple filters, you can click **Expand Filters** to display the entire list of filters that have been added. To reset your filters, click **Clear Filters**.

Add Constituents to a Giving Score Query List

After you run a Giving Score query, you can add constituents to the list if necessary. For example, if there is a specific constituent that is not on your VIP list because they have a Giving Score rating of Fan, you can manually add them to the list so they can be included in a mailing you plan to send.

Note: To open a constituent record, select a constituent in the list and click **Open** on the action bar. The constituent record appears.

▶ **Add constituents to a Giving Score query list**

1. On a Giving Score query record, click **Add to List** on the action bar and select **One Constituent** or **A group of Constituents**.

2. If you selected **One Constituent**, the Open screen appears.

   If you selected **A Group of Constituents**, the Open Query screen appears.

3. Search for the individual, or constituent query to add to your Giving Score query list.

4. Click **Open**. You return to the Giving Score query record, and the constituent or group of constituents are added to the list.

Remove Constituents from a Giving Score Query List

After you run a Giving Score query, you can remove constituents from the list if necessary. For example, if you plan to use your list of VIPs in a mailing for an upcoming golf tournament fundraising event, but you know one of your VIPs does not want to receive this type of communication, you can remove them from the list.

Note: To open a constituent record, select a constituent in the list and click **Open** on the action bar. The constituent record appears.

▶ **Remove selected constituents from a Giving Score query list**

1. On a Giving Score query record, select the constituent you would like to remove from the list.
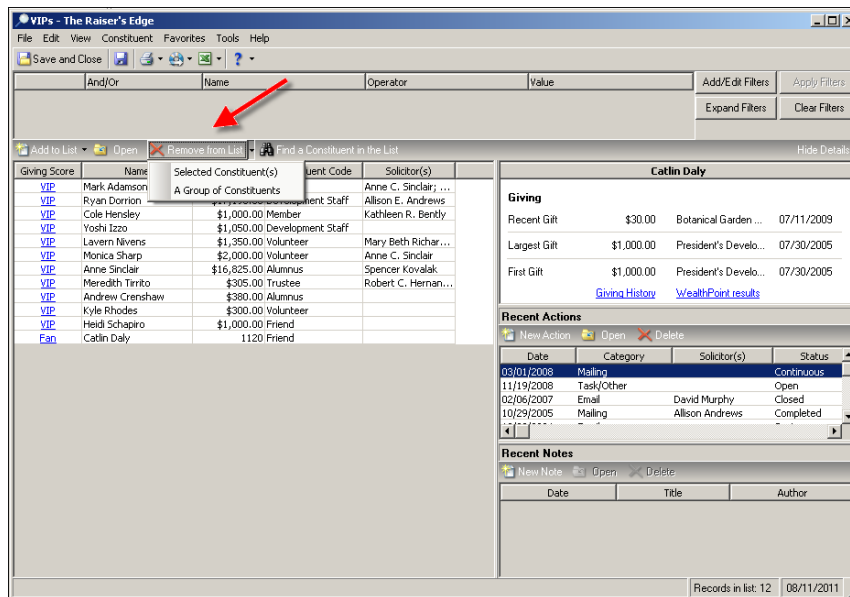
2. Click **Remove from list** on the action bar, and select **Selected Constituent(s)**.

Note: To select multiple constituents, hold down **CTRL** on your keyboard and select the constituents you would like to remove.

3. Click **Yes**. You return to the Giving Score query record, and the constituent is removed from your list.

▶ **Remove a group of constituents from a Giving Score query list**

1. On a Giving Score query record, click **Remove from List** on the action bar and select **A Group of Constituents**. The Open Query screen appears.

2. Search for the constituent query to remove from your Giving Score query list.

3. Click **Open**. A confirmation message appears.

4. Click **Yes**. You return to the Giving Score query record, and all constituents in the select query are removed from the list.

Assign a Solicitor to a Constituent in a Giving Score Query List

From a Giving Score query record, you can assign a solicitor to a constituent in the list. For example, since your VIPs are your best donors, each one should have a solicitor. If you notice a constituent in your VIP list does not a have a solicitor assigned to them, you can do so from here.

To assign a solicitor to a constituent in a list, click the magnifying glass in the **Solicitor** column for the appropriate constituent. The Open screen appears. Search for the solicitor for which to assign to the constituent, and click **Open**. You return to the Giving Score query record.
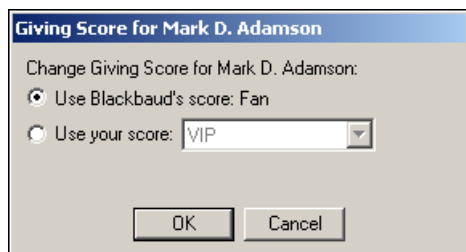
Override a Giving Score Rating

From a Giving Score query record, you can override a constituent's Giving Score rating if necessary. For example, when your data was scored by Target Analytics, a constituent received a rating of Fan. However, you have additional information about that constituent that makes you believe them to be a VIP. From a Giving Score query record, you can change their rating from Fan to VIP.

After you override a Giving Score rating and apply a new one from a query record, the new rating appears on the constituent record as well.

▶ **Override a Giving Score rating from a Giving Score query record**

1. On a Giving Score query record, click the Giving Score rating link for the constituent for which you would to change the rating. The Giving Score screen appears.

2. Select the Giving Score rating to use.

• To use the Giving Score rating assigned to the constituent when *Target Analytics* scored your data through the Data Health Center, click **Use Blackbaud's score**.

This option automatically assigns the most recent Giving Score rating from *Target Analytics*.

• To override the *Target Analytics* Giving Score rating and assign another rating, click **Use your score** and select the rating to assign.

The rating you assign will not change unless you assign a new one or select to use the *Target Analytics* score.

3. Click **OK**. You return to the constituent record.

Export

Contents

Exporting is extracting information from your database and sending it to some other place, mainly, another software application. There may be times when you want to take data from **The Raiser's Edge** and send it to another program, perhaps to a word processing program for a mailing or to a spreadsheet program for further analysis. You can also use **The Raiser's Edge** *Export* in conjunction with other program functions, like *Mail* and *Reports* or with outside programs like Microsoft *Word* and Microsoft *Excel*. In *Export,* you can indicate the type of export you want to create, the format you want to use for the data extracted, determine which records the program should use, and select the fields to export.

This process is also useful if you routinely create custom reports using your **Raiser's Edge** data. Using *Export*, you can select the appropriate criteria, extract the information you want to use, and create a customized report. You can update the data in your export by saving the export record and using it as a template for similar exports. You can also document and print information pertaining to an export by using a control report.

The Raiser's Edge can create several types of exports. These export types provide access to all the fields found in your database. You can use the export type as a way of filtering the fields available for your export. This is especially helpful if you already have an idea of what fields you want to use to design your export or what information you need to extract from your database.

Frequently Used Terms

To use *Export* correctly, you must have a basic understanding of the different terms used to describe parts of the exporting process. If you come across an unfamiliar term when reading this or any chapter in **The Raiser's Edge** documentation, make sure you check the online glossary in the help file.

Available Fields to Export. The **Available Fields to Export** box contains a list of all the fields and their parent groups you can use in your export. The fields you can export are based on the type of export you are creating and other filtering criteria established in the export record. Fields for each export type are listed in categories of information, which can be expanded to reveal all the fields that fall under each category.

Control Report. This is a report summarizing the characteristics of an export. A control report provides detailed information about an export, including an export's data file name and the data file location. This report also displays the multiple fields selected and how many records of information are in the export. We also recommend you print a control report before deleting any export files to keep a record of all export records you delete.

Criteria Group. A criteria group is defined as a set of related fields from the same record type. For example, the constituent information group contains all the fields found on the main constituent record. There are two types of criteria groups in export: One-to-One groups and One-to-Many groups. One-to-One and One-to-Many groups illustrate the relationship between groups of fields. For example, the spouse group has a one-to-one relationship with the constituent information group because each constituent can only have one spouse. The gifts group has a one-to-many relationship with the constituent information group because each constituent can have many gifts.

Data File. The data file is the file containing the actual information extracted from your database. For example, if your output fields are **First Name** and **Last Name**, your data file contains all the first and last names found in your database (John Doe, Mary Smith, etc.).

Export. An export sends selected information from your database to another software application. When you export information, it is very much like packing for a vacation. You select the items you want to take (output fields) and put them in your suitcase (data file) and take your suitcase to your final destination (another software application).

Note: Export formats are especially important if you are extracting information to send to a mailing house for address updating and verification, because formats can vary, and each mailing house requires a specific data format. For more information contact your mailing house.

Export Format. An export format determines the way the data extracted from your database appears and with which software application it is used. Some export formats include Microsoft *Excel*, Microsoft *Access*, and *Lotus 1-2-3*.

Export Record. An export record contains all the output fields selected for your export. This record also stores information regarding the filters and formatting options selected for certain output fields. If you export certain information on a regular basis, you can use the same saved export record to run multiple exports.

Export Styles. An export style is how data in the data file is presented. In *The Raiser's Edge* you can create two export styles: the flat style, which is one-row-per-record and suitable for mail merges or easy reporting; and the relational style, with separate record types in separate tables.

Output Field. An output field is the field you want to include in your export. These fields correspond to fields found in *The Raiser's Edge*. For example, if you want to export the names of all constituents in your database, one of your output fields will be **Name**.

Navigate in Export

The Export page contains the commands necessary to complete all exporting functions. You can customize this screen with shortcuts to facilitate your access to export records and reduce the time it takes to perform certain *Export* functions. For more information about customizing the Export page, see "Customize Export and Using Favorites" on page 203.

Parts of the Export Page

In order to navigate through *Export*, you must understand the parts of the Export page. To access the Export page, click **Export** on the Raiser's Edge bar. The Export page appears.
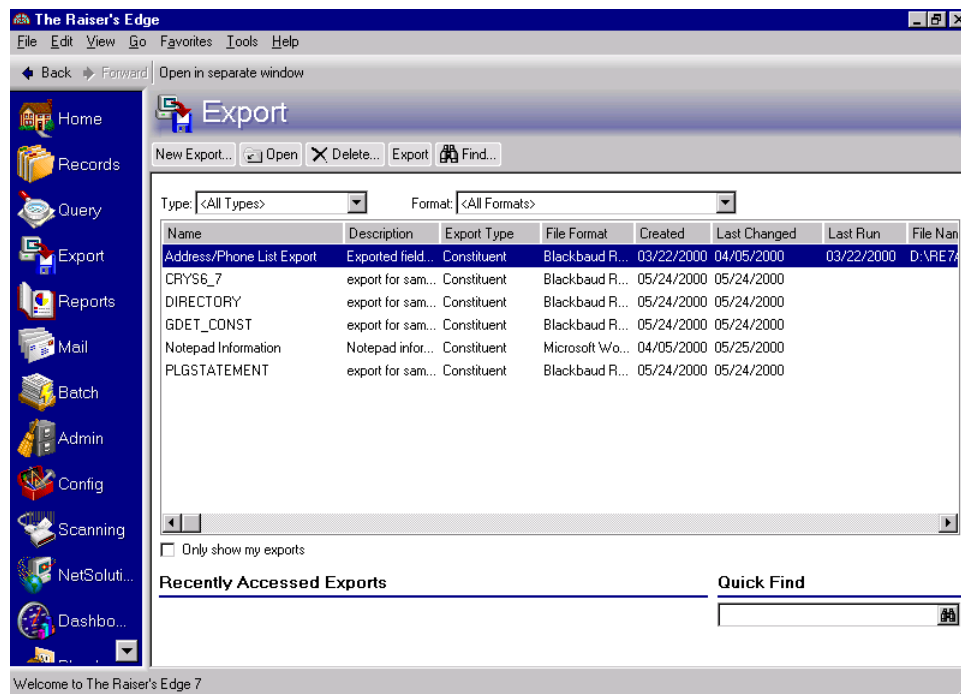
The Export page contains four main components: export action bar, export filters, export grid, and export locators.

Export Action Bar

Links on the action bar provide a shortcut to the commonly performed export tasks. From the Export page, you can create, open, delete, refresh, run and find an export. To begin any of these tasks, simply click the export link and the screen for that function appears.
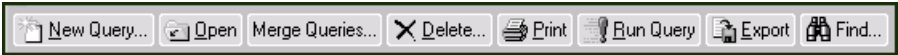
Export Filters

Export filters help you determine which exports display in the export grid. You can filter by export type or export format, or you can elect to show only the exports you created. The **Type** and **Format** fields and the **Only show my exports** checkbox are extremely helpful because they can reduce the amount of time it takes to locate an export. For example, if you are searching for a gift export you created, you may want to use export **Type** and the **Only show my exports** checkbox as filters.
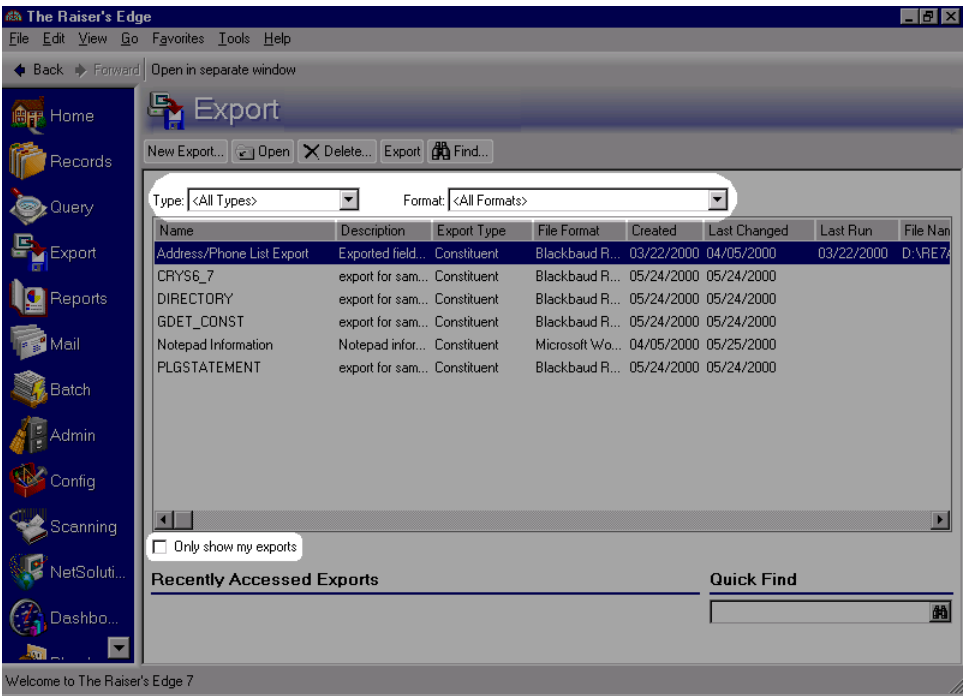
Export Grid

The export grid displays all the exports matching the selected export filters. The information displayed in this grid is entered, and can be edited, from the export record. To find an export, click the up and down arrows to scroll in the list.

Name	Description	Export Type	File Format	Created	Last Changed	Last Run	File Name
Address/Phone List Export	Exported field...	Constituent	Blackbaud R...	03/22/2000	04/05/2000	03/22/2000	D:\RE7AmyP(
CRYS6_7	export for sam...	Constituent	Blackbaud R...	05/24/2000	05/24/2000		
DIRECTORY	export for sam...	Constituent	Blackbaud R...	05/24/2000	05/24/2000		
GDET_CONST	export for sam...	Constituent	Blackbaud R...	05/24/2000	05/24/2000		
Notepad Information	Notepad infor...	Constituent	Microsoft Wo...	04/05/2000	05/25/2000		
PLGSTATEMENT	export for sam...	Constituent	Blackbaud R...	05/24/2000	05/24/2000		

Export Locators

Below the export grid are two areas you can use to search for exports. The **Recently Accessed Exports** area displays a list of the most recently opened exports. You can use the **Quick Find** field to enter the name of an export and locate it without opening the export search screen. If you have numerous exports in the export grid, you can hide these two areas if you select **View**, **Expand Export List** from the shell menu.
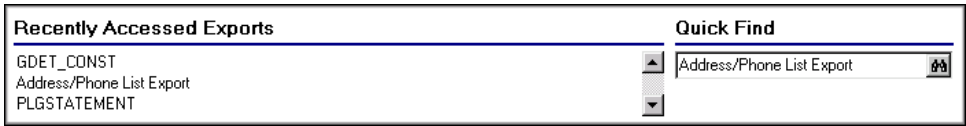
Access an Export Record

Once you create an export record, you can save and reuse it to update the information in your database. You can also modify the criteria or add and delete output fields. You can open an export record directly from the Export page.

The Open screen for *Export* serves a dual purpose. First, it helps you locate an export you cannot see in the list of export records displayed on the Export page, and second, it serves as a searching mechanism. Use some or all the fields in the **Find Exports that meet these criteria** frame to narrow your search.

▶ **Open an export record**

> **Tip**: You can also highlight the export in the export grid, and click **Open** on the action bar to access an export record.

1. On the Raiser's Edge bar, click **Export**. The Export page appears.
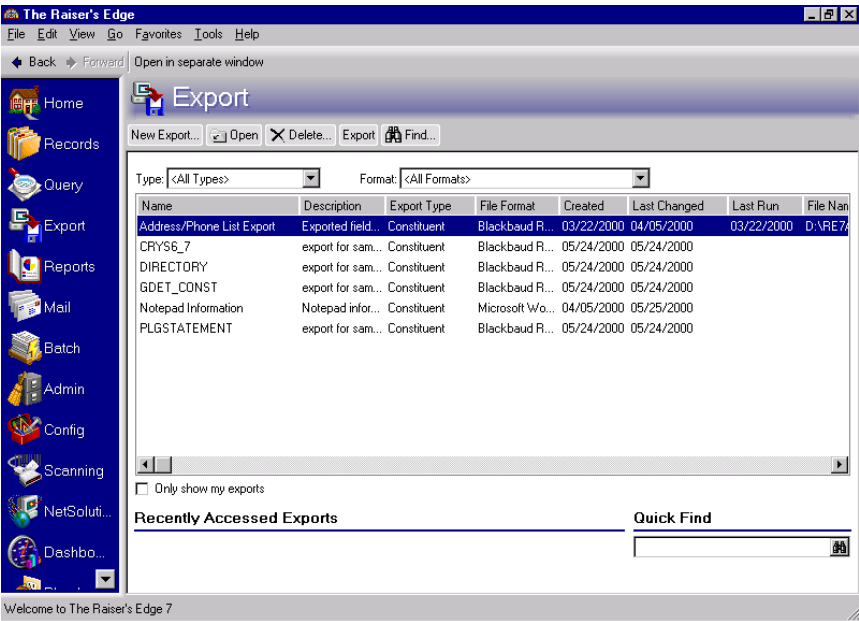
2. In the **Quick Find** field, enter the name of the export and click the binoculars. If no exports matching the description you provided exist, the Open screen appears.

Warning: We recommend using the filter fields on the **Find Export that meet these criteria** frame sparingly. Adding too many filters can narrow your search too much, resulting in no matches.

3. In the **Find Exports that meet these criteria** frame, decide what criteria you want to use to search for the query and enter the information in the appropriate fields. You can search by **Export type**, **Export format**, **Export name**, **Description**, **Date Added**, or **Added by**. Use the **Added by** field to enter the date the export was created. The **Added by** field helps you locate a query by its author.

4. If you want to display only export records that meet the exact criteria you define, check the **Exact match only** checkbox.

Note: If more than one export record is listed in the grid, you can use the **Expand Results** button to make the export list area larger.

5. Once you enter all your search criteria, click **Find Now**. The program searches the database and locates all export records matching the criteria you entered. These records appear in the grid.
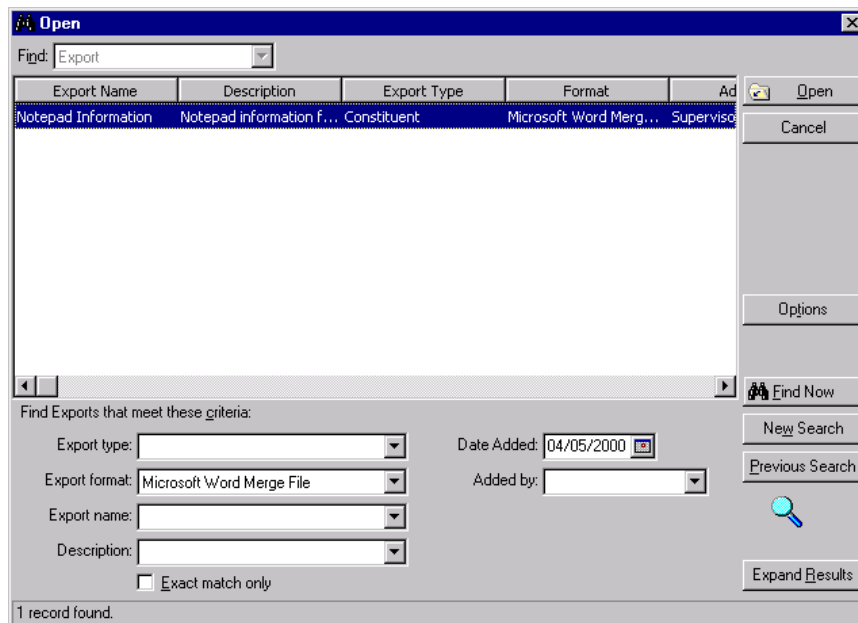
6. Once you locate the export record you want, highlight it and click **Open**. The selected export record appears.
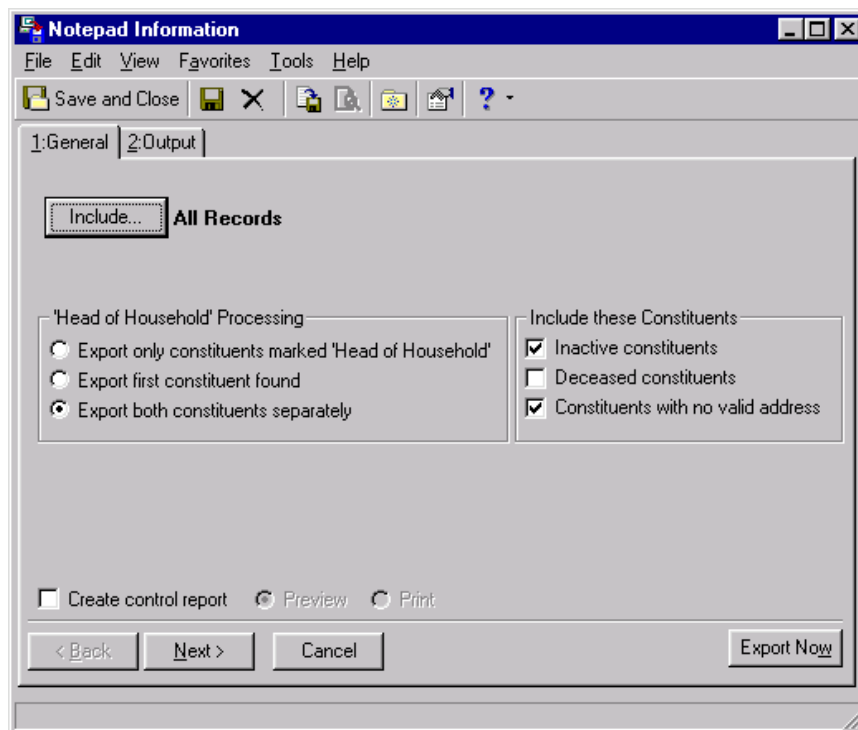
7. Make the appropriate changes and click **Save and Close** on the toolbar to save and exit the export record.

Toolbar Buttons

The toolbar contains buttons representing common commands used in *Export*. By clicking these buttons, you can easily perform a function, such as saving, without using the menu bar.
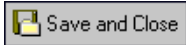
Save and Close

Save and close the export parameter file

> **Note**: You can set up a user option that enables you to view tooltips that explain the function of each toolbar command. Tooltips appear when you move your cursor across each item in the toolbar. For more information about setting up this user option, see the General Options section of the User Options chapter of the *Program Basics Guide*.

Save the current export parameter file

Delete the selected export parameter file

Run the selected export

Preview Export File Layout

Add this export record to your favorites list

View properties for a selected export

Access help topics

For a detailed explanation of all other toolbar options, see the Program Basics chapter in the *Program Basics Guide*

Export User Options

User options are preferences you set that affect how **The Raiser's Edge** looks and runs on the workstation you are using. User Options are login-specific, which means that if you log into any workstation using your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. You can establish user options by selecting **Tools**, **User Options** from the menu bar on the shell of **The Raiser's Edge**. The Options screen appears so you can establish certain user options that apply to export records. For more information about user options, see the User Options chapter of the *Program Basics Guide*.

▶ **Establish export user options**

Using **General** options on the Export tab in User Options, you can establish your default export type and format. On this tab, you can also select what type of action should occur when you select an export on the Export page and determine how the program exports fields with Yes/No values.

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools**, **User Options**. The Options screen appears.
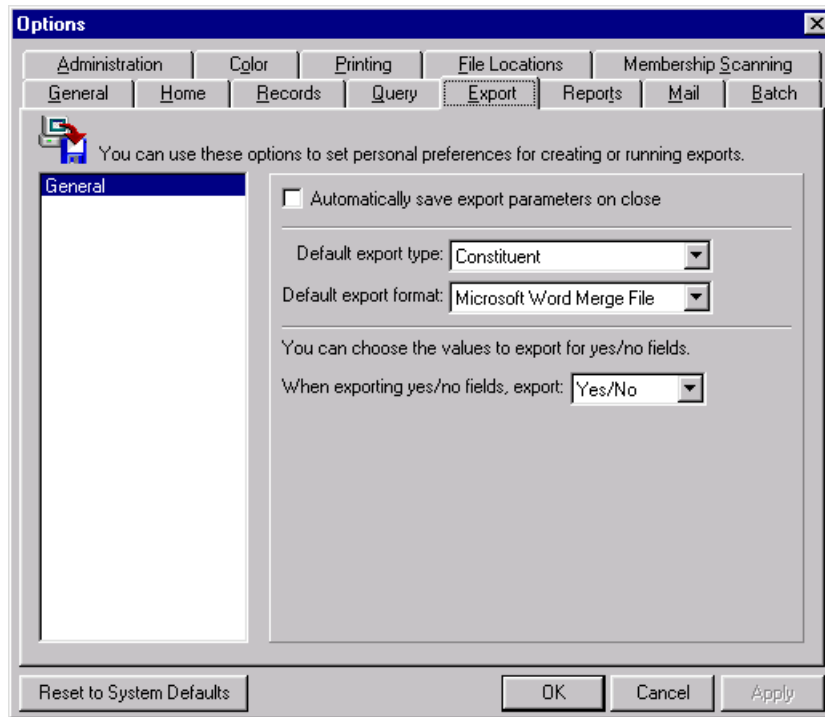
2. The Export tab opens with **General** selected in the box on the left. You can mark a checkbox to **Automatically save export parameters on close**. If you have not saved an export before, when you close it, the Save Export As screen appears so you can name and save the export. If the export has already been saved, when you close it, the parameters are saved without the Save Export As screen appearing.

3. In the **Default export type** field, you can select the type of export you want to appear as a default on the Create a New Export screen. You can always override your selection. If you create one type of export more than others, entering it as your default can speed data entry.

4. In the **Default export format** field, you can select the type of format you want to appear as a default on the Create a New Export screen. You can always override your selection. If you create a certain export format more than others, entering it as your default can speed data entry.

5. In the **When exporting yes/no fields, export** field, determine how values for fields that require an "either, or" entry display. The default is Yes/No, but you may want to use another variation such as True/False or Y/N.

6. Select the File Locations tab. You can set the default location for your export files.
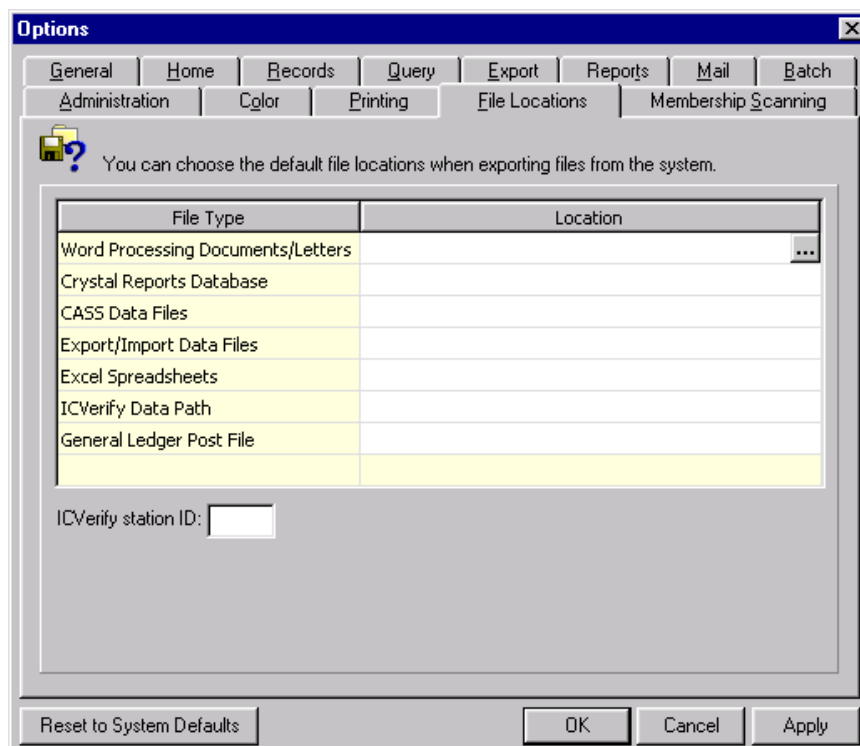
7. In the **Export/Import Data Files** row, click in the **Location** column. An ellipsis appears to browse to a default location.

Note: If you want to undo any changes you made and reestablish all program settings, click **Reset to System Defaults**.

8. Click **Apply** to apply and save your changes or click **OK** to save your changes and close the Options screen.

To exit User Options without saving your most recent changes, click **Cancel**.

Export Types

Note: You can use an export type as a filter when searching for an export on the Export page.

To use *Export* properly, it is essential to understand the different export types. When you select a specific export type, the program looks only at fields pertaining to the type you select. Export types determine the criteria groups available to include in an export. For example, if you select to create a Gift export, only fields related to the gifts record are available.

When searching for an export on the Export page, you can narrow your search by using an export type.

You can select from the following export types:

Action. An Action export is based on the action record found on the Action tab of an appeal, event, or constituent record. For example, if you schedule a meeting with a group of constituents and want to send a letter to inform them of a meeting location change, you can create an Action export and extract the fields you want to include in the letter.

Appeal. An Appeal export is based on the appeal record. For example, if you want to analyze the status of all your inactive appeals, you can use the Appeal export to extract the information you want to review and export it to a Microsoft *Excel* spreadsheet.

Campaign. A Campaign export is based on the campaign record. For example, you are preparing a campaign status report spreadsheet for your Board Members or prospective donors. You can use a Campaign export to extract information about your campaigns you want to include in the report.

Constituent. A Constituent export is based on the constituent record. Constituents are individuals or organizations in your database who have donated time, funds, or resources to your organization. Constituent exports give you access to all fields you find in other export types. The Constituent export type gives you a complete picture of the entire constituent record, including information about gifts, relationships, memberships, and actions. For example, you want to create a report detailing the amount each donor (both individual and organization constituents) contributed to a specific campaign. You can use the Constituent export to extract this information.

Event. An Event export is based on the event record and is available only if you use the optional module *Event Management*. For example, you are planning your organization's annual conference and need to create a spreadsheet with the name of all the events associated with the conference, all the participants assigned to each event, the names of the coordinators for each event, and the instructor or speaker for each event. You can use an Event export to retrieve all this information.

Fund. A Fund export is based on the fund record. For example, you are preparing for your annual board meeting and are asked to prepare a presentation regarding the status of all active funds currently receiving donations. You can use the Fund export to retrieve the information from your database.

Gift. A Gift export is based on the gift record. For example, you are meeting with a representative from a prospective donor company, and she wants to know how many other companies are matching employees' donations and what is the highest level of contribution for these organizations. You can use the Gift export to extract this information.

Individual Relationships. An Individual Relationships export is based on the relationship information found on the relationship record on the Relationship tab of the constituent record. For example, you are planning your organization's Mother's Day event and want to create labels to send Mother's Day invitation cards to all mothers listed as relationships to the constituents in your database. You can use the Individual Relationships export to extract this information.

Job. A Job export is based on the job record and is available only if you use the optional module *Volunteer Management*. For example, you are planning your organization's annual walk-a-thon, and your director asks for a breakdown of all the volunteer positions that need to be filled for the event, the minimum qualifications needed for each, and the name of the person who filled that position last year. You can use a Job export to retrieve this information.

Membership. A Membership export is based on the membership record. The Membership export type is available only if you use the optional module *Membership Management*. For example, you need to send a letter to all your members reminding them of the Members Day that your organization is planning for them. You can use a Membership export to retrieve all the information you would need for your letters.

Participant. A Participant export is based on the participant information found on the Participants tab of the event record. This export type is available only if you use the optional module *Event Management*. For example, you are preparing to create the seating assignment chart for your organization's annual banquet. You want to make sure you seat all the same type of donors in the same area and all participants are seated with their guests. You can use the Participant export to create a spreadsheet with all this information.

Export Formats

Export formats determine the way the data exported from your database appears in the data file and with which application it is used. Export formats are especially important for address verification and other activities in which you are exporting information you plan to update and import back into **The Raiser's Edge** database. Although export formats are totally independent from export styles, some formats work better with certain styles. For example, you can use a relational export style if you choose Blackbaud Report Writer, Microsoft Access 2.x, 95, or 97 Database formats, and you select to export One-to-Many criteria groups in separate tables. For more information about export styles, see "Understand Export Styles" on page 152.

More About Export Formats

The following is a list of the export formats available in **The Raiser's Edge**.

Blackbaud Conditional Word Merge (DOC). Use this export format to create conditional mail merges using Microsoft *Word* and **The Raiser's Edge**. When you select this export format, the Blackbaud Conditional Word Merge Wizard generates. The wizard helps you select the information you need to create an entire conditional mail merge, automating the process for you. This includes selecting the conditional field for the mask document and writing each individual letter to be used in the conditional mail merge. For more information about using the Blackbaud Conditional Word Merge Wizard, see the Mail Merge With Microsoft Word chapter in the *The Raiser's Edge & Microsoft Office Integration Guide*.

Blackbaud Simple Word Merge (DOC). Use this export format to create simple mail merge documents using Microsoft *Word* and **The Raiser's Edge**. When you select this export format, an **Edit merge document** button appears on the toolbar. Click **Edit merge document** to open *Word* and create your simple mail merge document. When you export the information, your letters generate automatically. For more information about selecting Blackbaud Simple Word Merge export format, see the Mail Merge With Microsoft Word chapter in the *The Raiser's Edge & Microsoft Office Integration Guide*.

Blackbaud Report Writer Database (MDB). Use this export format when you want to use *Seagate's Crystal Reports* with your **Raiser's Edge** data. After an export completes in this format, use the MDB (Microsoft Jet DataBase) file in *Crystal Reports* to manipulate and customize the data in a format you need. If you select this export format, you are not required to define the number of fields to export.

Blackbaud XML Export (XML). Short for Extensible Markup Language, XML describes the data in your export file and provides a consistent means to share information. XML is frequently used to make different parts of Web page content available to different audiences. If you select this export format, you are not required to define the number of fields to export.

Character Separated Values (CHR). In a CHR data file, you select the separator field (for example, quotes) for characters. These files are often referred to as "ASCII" files, and can be used for importing and exporting data.

Comma-Separated Values (CSV). In a comma-separated values file, each piece of data is separated by a comma. This is the most common export format used to export or import data into **The Raiser's Edge**. CSV files are also commonly called "comma delimited" or "ASCII" files.

dBase III (DBF). Use this export format when you want to use *Ashton Tate Corporation's dBaseIII* with your **Raiser's Edge** data. After an export completes in this format, use the DBF (DBase Format) file in *dBaseIII* to manipulate and customize the data in a format you need.

Excel 3.0 (XLS), Excel 4.0 (XLS), and Excel 5.0 (XLS). Use this export format when you want to use Microsoft *Excel* with your **Raiser's Edge** data. After an export completes in this format, use the XLS (XL Spreadsheet) file in *Excel* to manipulate and customize the data in the spreadsheet program. This format also works with Microsoft *Excel 97* or higher.

FoxPro Database (FPT). Use this export format when you want to use *FoxPro* with your **Raiser's Edge** data. After an export completes in this format, use the FPT (FoxPro Table) file in *FoxPro* to manipulate and customize the data in a format you need.

Internet Document (HTML). Short for HyperText Markup Language, this export format is used to create documents on the World Wide Web. HTML controls the layout of a Web document based on the formatting in the data file.

Lotus 1-2-3 (WK1) and Lotus 1-2-3 (WK3). Use this export format when you want to use *Lotus 1-2-3* with your **Raiser's Edge** data. After an export completes in this format, use the WK1 or WK3 (Workbook) file in *Lotus 1-2-3* to manipulate and customize the data in the spreadsheet program.

Microsoft Access 2.x Database, Microsoft Access 95 Database, and Microsoft Access 97 Database (MDB). Use this export format when you want to use Microsoft *Access* with your **Raiser's Edge** data. After an export completes in this format, use the MDB (Microsoft Jet DataBase) file in *Access* to manipulate and customize the data in a format you need. This format also works with Microsoft *Access 97* or higher.

Microsoft ADO Recordset 2.1 (ADO). Short for ActiveX Data Objects, ADO is a high-level interface for data objects. ADO can be used to access a wide variety of different data types, including Web pages, spreadsheets, and other documents. Together with OLE DB and ODBC, ADO is one of the main components of Microsoft's Universal Data Access (UDA) specification, which provides a consistent way of accessing data regardless of how the data is structured.

Microsoft ADO XML Recordset 2.1 (XML). Short for Extensible Markup Language, XML is an industry standard text format commonly used to structure the content of Web documents. If you select this export format, you are required to define the number of fields to export. This type of format is similar to a CSV file, but is not delimited by commas.

Microsoft Word Merge File (DAT). DAT is a generic file extension for data files. Select this export format when creating a mail merge in Microsoft *Word*.

Rich Text Format\Microsoft Word Table (RTF). RTF files are ASCII files with special commands that indicate format information such as margins and fonts. These files can be used between different applications on different platforms.

Text (TXT). TXT files are composed of text characters. These files encode a format that most all computers can use because it does not use special formatting characters.

WordPerfect Merge File (DAT). DAT is a generic file extension for data files. Select this export format when creating a mail merge in *Corel's WordPerfect*.

Export Record Components

The export record contains all the criteria established for the export, information to determine which records should be considered for export, output fields, and specific formatting options established for the output fields. You can create templates for the exports you run most frequently using the export record. For example, if you normally run letters requesting donations at the end of each month, you can create a constituent export with the type of information you export for these letters, including the constituent name and address and any pertinent gift information. At the end of each month, you can select the group of constituents who have not received this letter and use the saved export record to extract the information you specify.

The export record is composed of the General tab and the Output tab.

General Tab

On the General tab, you can determine which records you want to consider for export. You can choose to use all records from your database, selected records from your database using a query, or one record from your database. For more information about the records to include options, see "Understand the Include Options" on page 145.

On this tab, you can also define other processing preferences for the export type you are creating. For example, on the General tab of a Constituent export, you can determine how to process individuals marked as **Head of Household**. If inactive, deceased, or constituents with no valid address should be included in the export. The General tab for each export type is different and displays information pertinent to the type of export you are creating.

Output Tab

On the Output tab, you can select the fields corresponding to the data you want to see in your export. The Output tab is comprised of two areas: the **Available Fields to Export** box and the **Output** box. The **Available Fields to Export** box displays a list of all fields available for your export. The fields available for selection depend on the export type you select. For more information about export types, see "Export Types" on page 139. The **Output** box displays the fields you select for your export. You can also select formatting for certain output fields. For example, if you want to use a date field in your export, you can select to use the long or short format for the date.
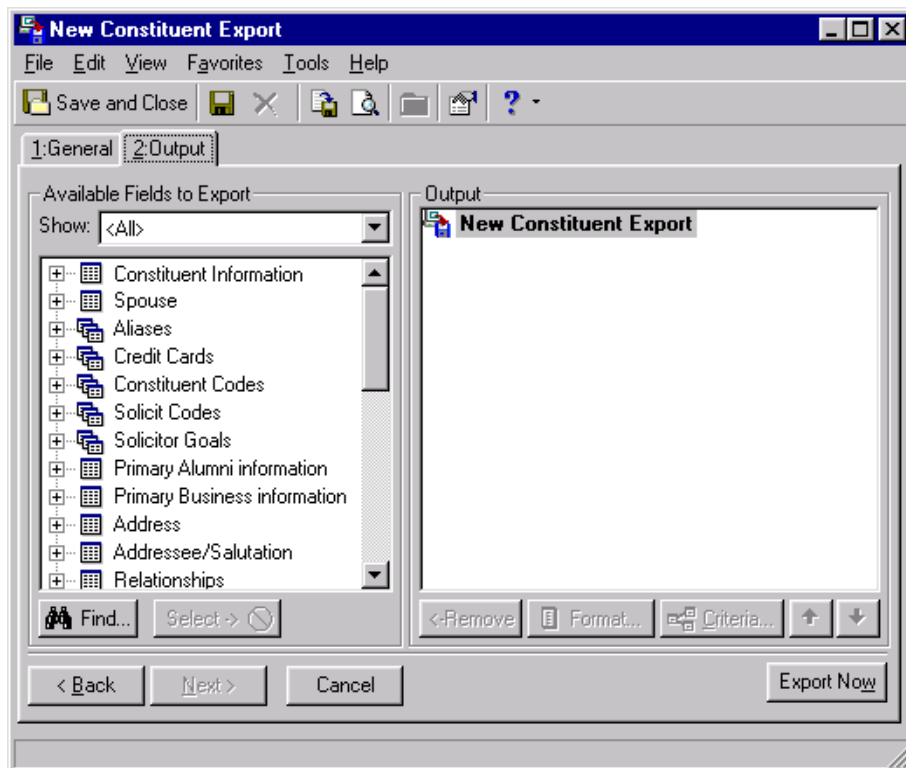
On the Output tab, you can define criteria for certain fields. For more information about the Output tab, see "Understand an Export Output" on page 147.

Understand the Include Options

You can choose the group of records the program should use for your export. The **Include** button on the General tab allows you to refer the program to the groups of records it should consider when exporting. You can select to use **All Records**, **Selected Records** (with a query), or **One Record** from your database.
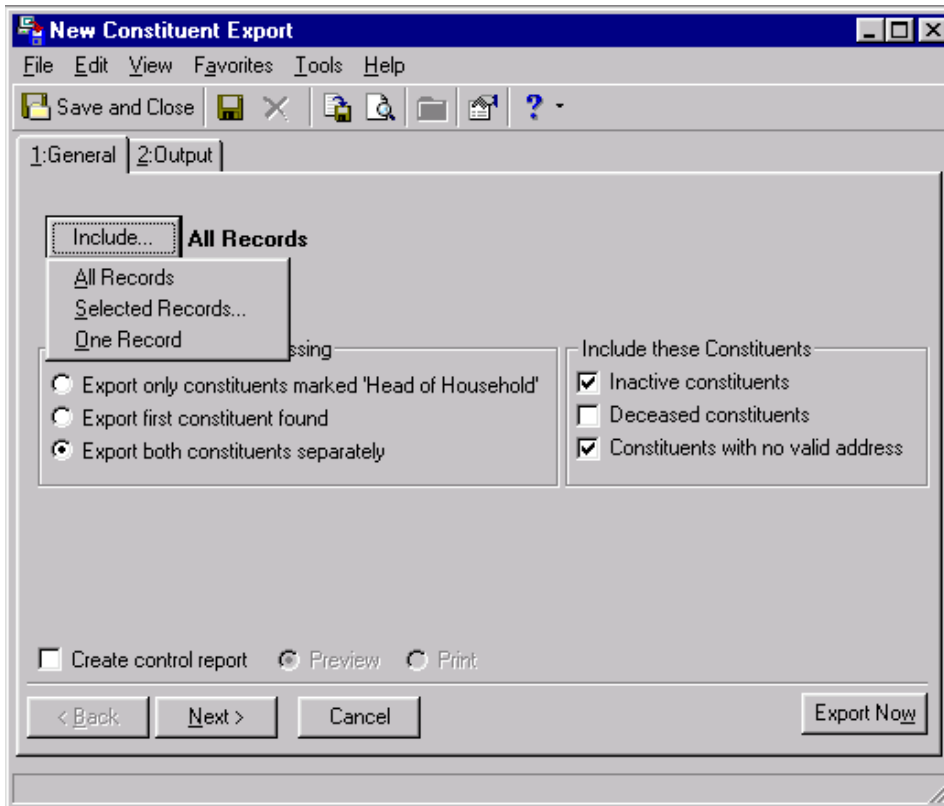
Think of your database as a filing cabinet and the **Include** selections as filing drawers. When you make one of these selections, you tell the program to find a specific drawer and use only the records within to create the export.

All Records. If you select **All Records**, all records of that type found in your database are included. For example, if you are creating a Constituent export and you select **All Records**, you are telling the program to consider all constituent records found in the database. This means the program exports the information you define for all constituent records found in your database. Using the filing cabinet example, if you select **All Records**, the program uses the entire filing cabinet.

Note: You can use the **Selected Records** option only if you group your records using *Query*.

Selected Records. Choose **Selected Records** to select a smaller group from your database. This selection requires that you group records for the export using a query. For example, if you are creating a Constituent export, but only want to export information for constituents who donated $5,000 to your organization's Literacy Campaign, you can use **Selected Records**. You must first create a query group containing these records. If you choose **Selected Records**, the program uses one filing drawer (query of grouped records) within your filing cabinet (all records). Once you make this selection, you can search for the query you created earlier from the Open Query screen.
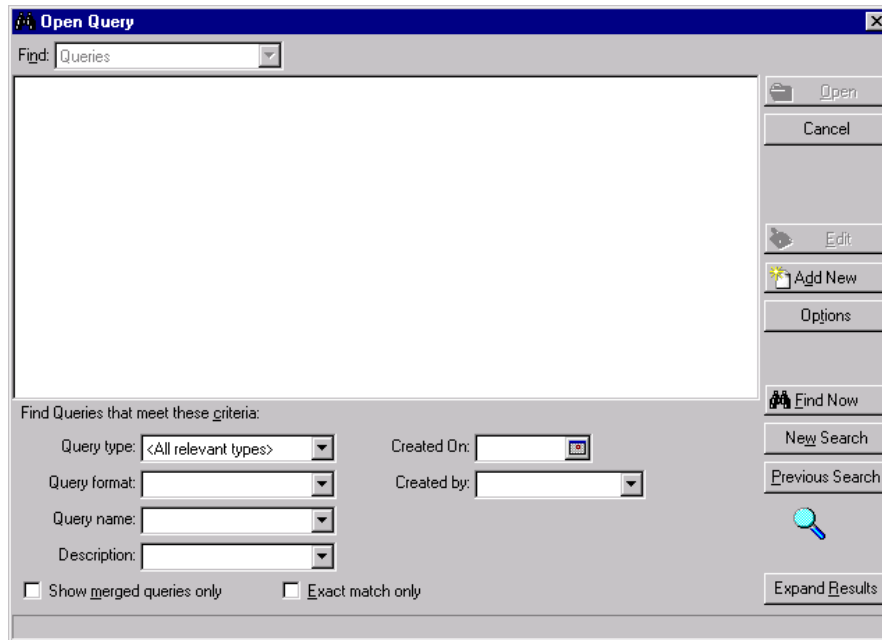
For more information about the Open Query screen, see "Access a Query" on page 9.

One Record. With **One Record**, you can select a specific record within your database. For example, if you are creating a Constituent export but you are only interested in extracting information for John Doe, use **One Record**. If you select **One Record**, the program looks in the filing cabinet (all records) and selects a specific file folder (one record). You can search the database for the specific record you want using the Open screen.

For more information about the Open screen for constituent, see the Program Basics chapter of the *Program Basics Guide*.

Understand an Export Output

Export provides flexibility when you select the type of information you want to export. Certain output fields have alternate formatting options. For example, you can set up multiple criteria groups for One-to-Many and Summary fields and specify filter criteria for the entire group. If you export gift information, you can create a criteria group for **Total Gift amount** that filters only Cash gifts. You can then create a second **Total Gift amount** criteria group that filters only Pledge gifts.

Understand Criteria Groups

Criteria groups in export are defined as a group of related fields from the same record type. For example, the **Constituent Information** group contains all the fields on the main constituent record and a **Gifts** group contains all the fields contained in a gift record. The Output tab of an export record displays all the criteria groups in the **Available Fields to Export** box. In *The Raiser's Edge,* two types of criteria groups exist: One-to-One groups and One-to-Many groups. One-to-One and One-to-Many criteria groups illustrate the relationship between groups of fields. Below is an in-depth description of these groups and how they can be used in your export.

One-to-One Criteria Groups

A One-to-One criteria group is composed of fields for which only one value exists in your database. For example, the **Spouse** group is a One-to-One criteria group because only one relation in a constituent's record is considered a spouse. **Preferred Address** is another One-to-One criteria group because each constituent can have only one preferred address in their record.

You can recognize a One-to-One criteria group in two ways. One-to-One criteria groups display in *The Raiser's Edge* as a single table icon on the **Available Fields to Export** box.
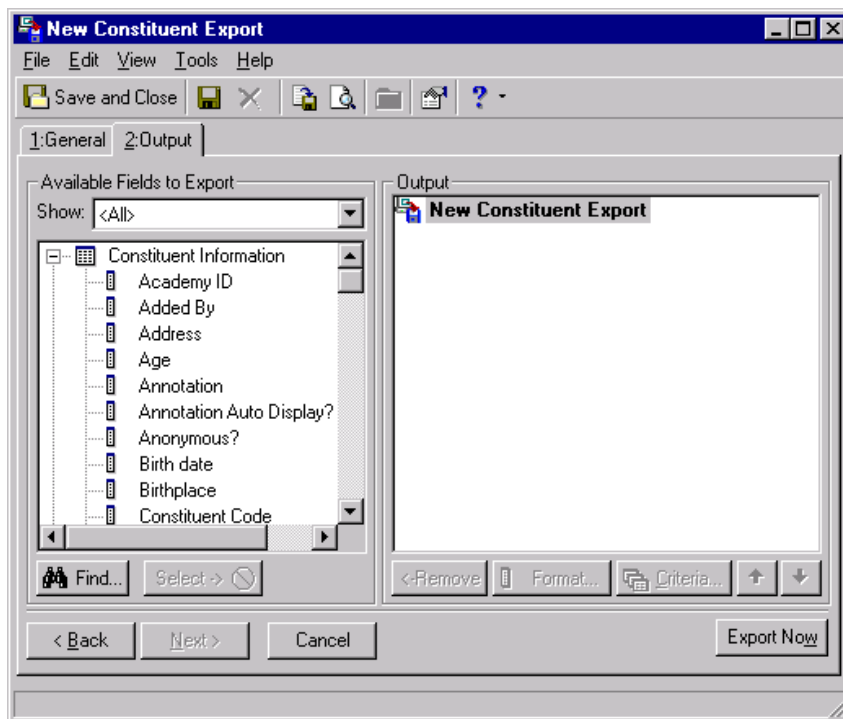
One-to-One criteria groups do not have the option of assigning any additional criteria to them through the **Criteria** button on the Output tab when they are selected as output fields.

One-to-Many Criteria Groups

A One-to-Many criteria group is composed of fields for which several values exist in your database. For example, the **Gift** group is a One-to-Many criteria group because each constituent record can be associated with more than one gift. **Notes** is another One-to-Many criteria group because each constituent can have more than one notepad in the constituent record.

You can recognize a One-to-Many criteria group in two ways. One-to-Many criteria groups display in *The Raiser's Edge* as an icon depicting one table related to other tables on the **Available Fields to Export** box.
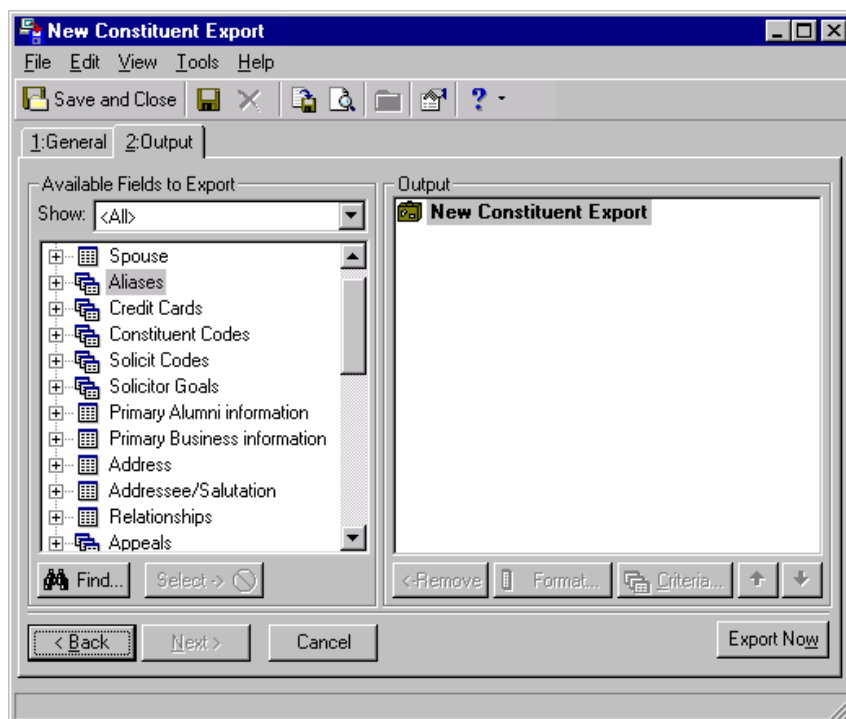
You can also recognize One-to-Many criteria groups because when you select them as output fields, you can access additional filtering options to help you determine the records you want to export. These filtering options display when you click the **Criteria** button on the Output tab. For more information about criteria screens, see "Understand Output Criteria Screens" on page 150. When you select One-to-Many criteria groups, you have the option of defining which records you want to export, or you can determine how many instances of the same field you want to export. For example, if you select the One-to-Many criteria group **Credit Cards** and the criteria field **Expires**, the **Credit Cards** criteria screen appears.
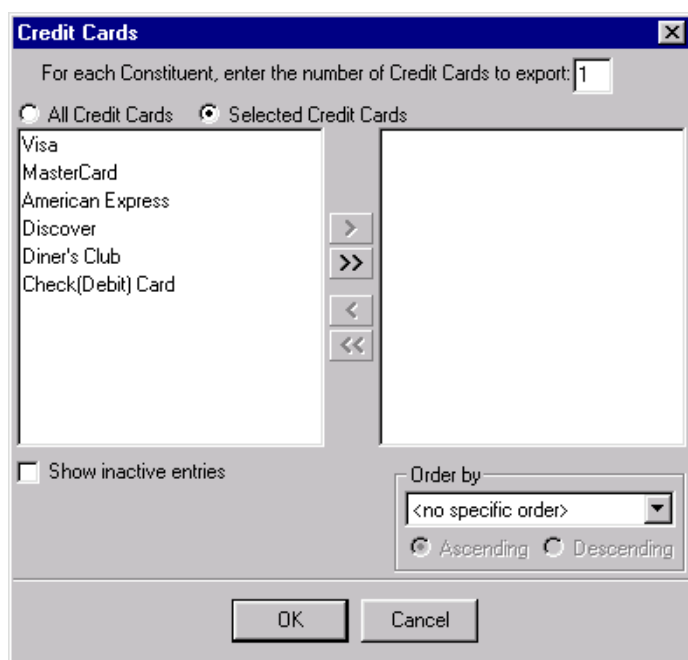
On this screen, you can determine how many credit card records you want to export and define the credit cards for which you want an expiration date.

Establish Multiple Criteria Groups

In *Export*, you can define multiple criteria groups for One-to-Many and Summary fields. This means that you can define multiple instances of the same group type, each with its own unique filtering criteria. For example, if you want to design an export and include information about your gifts, you can define a gift group for Cash gifts and a gift group for Pledges.

You can further define the exported gifts by adding different criteria fields to each gift group. To do this, select the first group by highlighting the field in the **Available Fields to Export** box, and clicking **Select**. The query field and its parent criteria move to the **Output** box. For the second criteria group, highlight New Constituent Export (or corresponding export type) or the title of the export in the **Output** box. Then, highlight the field in the **Available Fields to Export** box, and click **Select**. The query field and its parent criteria move to the **Output** box. The multiple gift groups used in the example appear in the output like the one below.
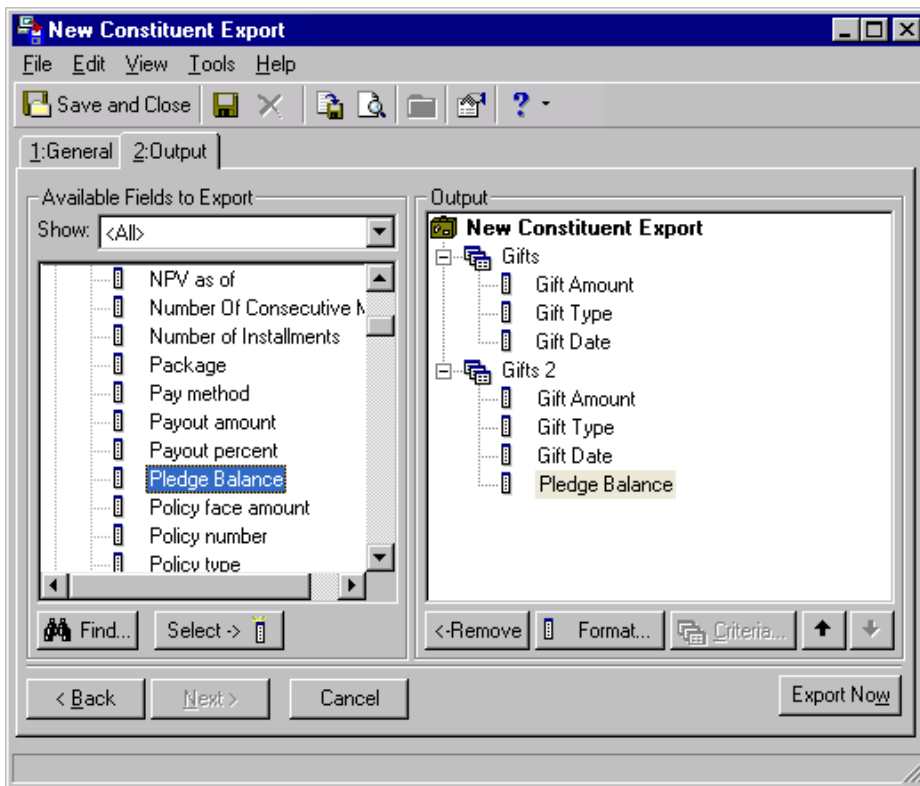
The option of establishing multiple instances of the same group type is useful if you want to compare similar items. For example, if you want to create a report and compare the total gift amounts received during the year, you can create a gift group for each gift type (Cash, Pledge, Stocks, etc.) and compare those amounts.

Understand Output Criteria Screens

Note: The type of criteria screen that appears depends on the field you select. For example, with certain export groups, you can sort by fields in the group. If you select the **Reciprocal** field in the Relationships, Individuals group, an **Order by** frame appears on the criteria screen. You can select "Birth date" in **Ascending** order in this frame to sort by the oldest birth date within the reciprocal export.

On the Output criteria screen, you can specifically tell the program what records to extract. Output criteria screens act as a filter for the records in your database. Once you select to export a field from a One-to-Many criteria group, you can decide the characteristics these records must meet to be selected. For example, if you want to export relationships for your constituents, and you decide that for each constituent you want to export the relationship corresponding to the father and mother, you can use a criteria screen to specify that only those relationships should export. The criteria screen for the example appears like the one below.

Understand Output Field Formatting

Note: Use the **Sort Key**, accessed in the **Available Fields to Export** frame on the Output tab, to correctly alphabetize individual and organization names in *Query* and *Export*. Define your preferred name format on the Query tab in User Options. The names are alphabetized based on the format you select. For example, define your name format as "Last, First Middle", include the **Name** field in the Output and the **Sort Key** on the Sort tab. Records for Blackbaud, Inc., Mrs. Elizabeth Ann Ashton, Mr. Nicholas Vincent, and Dr. Robert Carlos Hernandez list as, "Mrs. Elizabeth Ann Ashton, Blackbaud, Inc., Dr. Robert Carlos Hernandez, and Mr. Nicholas Vincent."

You can use output fields to determine what information is extracted from your database. Certain output fields have alternate formatting options. Format screens determine how the program formats the actual data it extracts from your database, or how data appears once the export is run. For example, you can use a format screen to determine the type of addressee you want to use for individuals and organization records extracted from your database.

You can select if you want to use the addressee/salutation found in the constituent record, the addressee/salutation from *Configuration*, or if you want to use the constituent's name. In addition, you can also determine if the organization records extracted should appear with the organization name only, if the addressee/salutation should include the name of the contact person for that organization, or if the program should leave these entries blank.

Formatting options affect only one field at a time. This means if you export the same field twice and want them to be formatted in the same way, you must apply the preferred formatting both times the field is exported.

To maintain consistency in your export, you must either format all like fields the same way or let the program assign the default formatting options to all fields.

You can assign alternate formatting for date fields, currency fields, state fields, amount fields, primary salutation fields, primary addressee fields, and additional addressee/salutation fields.

Once you select one of the multi-format fields discussed earlier, you can access the corresponding format screen by clicking the **Format** button of an export record screen.

For certain fields such as dates, *The Raiser's Edge* uses the formatting option established in the Control Panel of your *Windows* program.

Understand Export Styles

Once you select the information you want to extract, you can also select the style of export you want to create. "Export style" is a term used to describe how the extracted data is present in the data file. In *The Raiser's Edge,* you can create two export styles: Flat Style and Relational Style.

Export styles are totally independent from export formats, although some export styles work better or are only available with certain export formats. For more information about export formats, see "Export Formats" on page 140.

Flat Style Exports

A Flat Style export is an export in which the information displays in grid format. Each row contains a different record and each column displays a field within that record. For example, in a constituent export, each row displays all information extracted for the constituent. Flat style exports are used most often for mail merges, but they are also useful when doing simple reports.

The Raiser's Edge provides two ways for you to visualize a flattened export data file. From the menu bar, you can select **View**, **Header Field Names** to see the naming convention used for the data extracted. For example, if you want to export the first two home phone numbers and the first two business phone numbers for your constituents, the Output tab of your export may look like the one below.
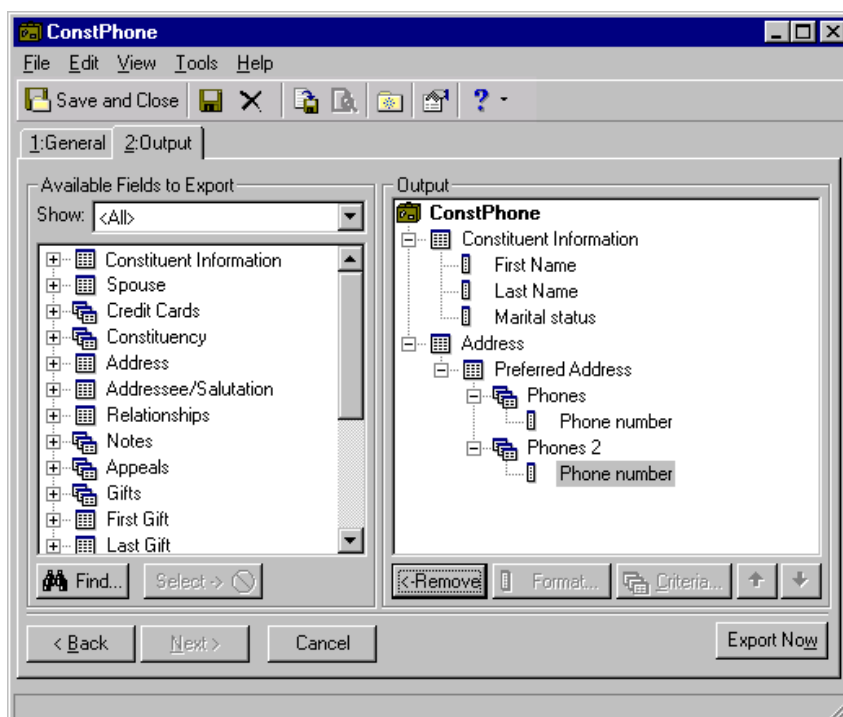
If you select to use **Header Field Names**, you can easily see all the fields that will appear in your export. For the example above, the row header names appear like the ones below.
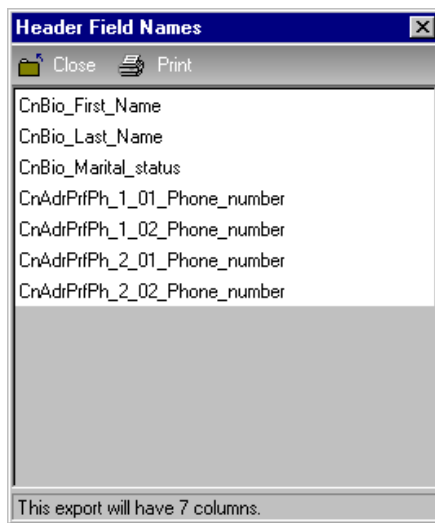
Each criteria group is identified by a unique name. Using the example above, CnBio_First_Name is the constituent first name and CnAdrPrfPh_1_01_Phone_number is the first preferred home phone number for each constituent, and so on.

From the menu bar, select **File**, **Preview Export File Layout** to view a sample of your data file. This menu option presents a grid view of the first few rows in the export. In this view, the headers displaying in the Header Field Names screen are the column headers in the grid. For the example we used previously, the preview appears like the one below.

The bottom of the screen lets you know how many columns appear in your export. For more information, see "Preview an export layout" on page 196.

Relational Style Exports
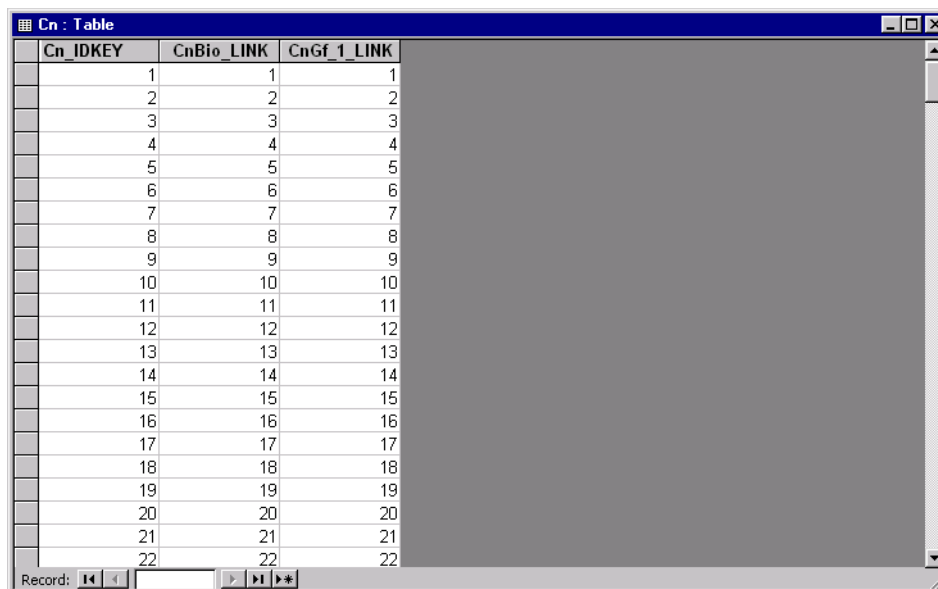
A Relational Style export is an export in which the information for each selected criteria group is displayed in a separate table. Each row in the table may or may not correspond to a separate record. If you export to *Seagate's Crystal Reports* and select Blackbaud Report Writer Database in the **Export format** field, the data displays in a Relational Style. Also, if you select Microsoft Access 2.x Database, Microsoft Access 95 Database, or Microsoft Access 97 Database in the **Export format** field, and mark the **Export one-to-many records in separate tables** checkbox, the fields export in a Relational Style. For example, if you want to export the gift information for the constituents in your database, the Output tab of your export may look like the one below.
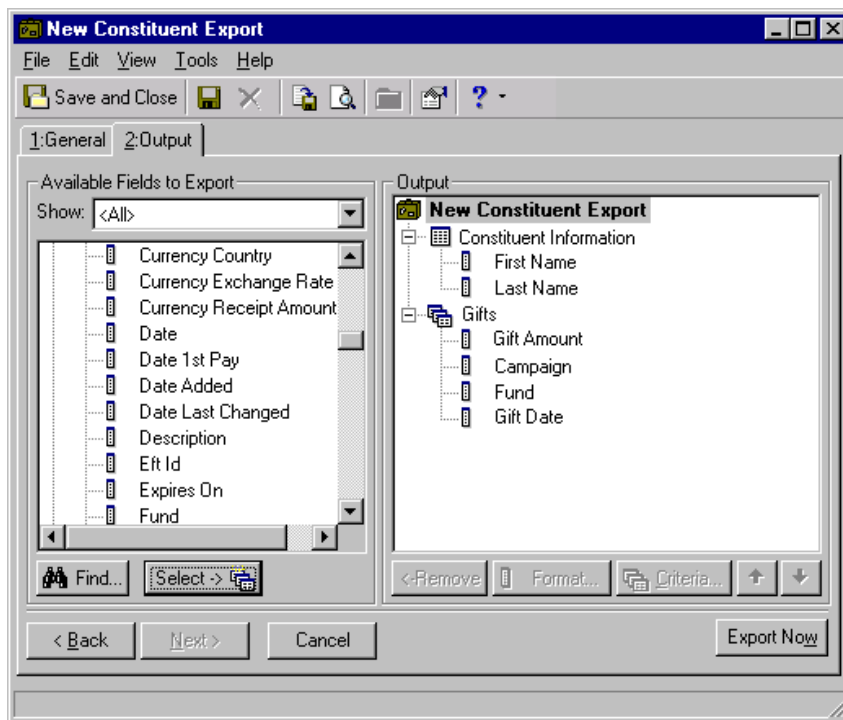
For this example, the data file for this relational style export contains three tables: a key table to define how records are linked, a table with all the constituent biographical information, and a table for the gift information. If you export to a Microsoft Access Database format, the data file appears like the one below in Microsoft *Access*, where Cn defines how records are linked, CnBio contains the constituent's biographical information, and CnGf_1 contains the gift information.
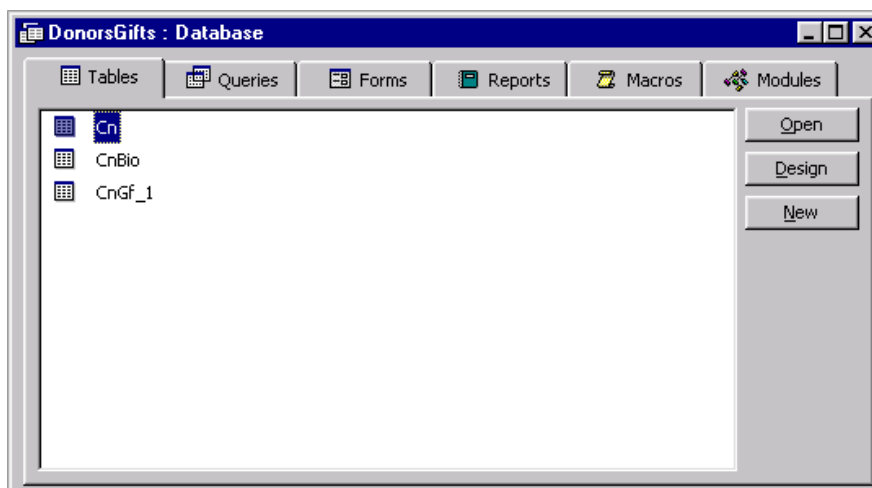
If you select the relational style, you do not have to specify the number of records you want to export. The relational export style gives you access to all the records meeting the criteria you established.

You can use the Cn key table in Microsoft *Access* to link each constituent to his gifts. The linkage process automatically occurs when using *Seagate's Crystal Reports*.

When exporting to a relational style, the **Preview Export File Layout** menu option under the **File** menu and the **Header Field Names** menu option under the **View** menu are not available.

Work with Export

> **Warning**: If you use a mailing house, be aware that address lines are imported and exported with the /n between address lines instead of separate fields. For example, if your address is 123 Main Street Apt. 6, it exports and imports as "123 Main Street/nApt. 6". If your mailing house cannot accept this format or the mail house cannot return the file in this format, you must separate the addresses before you send the export file.

Once you are familiar with the terms and concepts associated with the exporting function, you are ready to begin creating exports. You can create, open, edit, delete, save, run, and send an export through email. You can also change an export's properties and print a control report. Procedures in this section provide the basic information you need to perform more advanced exporting functions.

•

Create an Export

> **Note**: The export record, which is the record containing all the output and formatting choices for your export, can be customized, saved, or reused in the future.

The export function helps you extract records from your database to use in other applications. This process is very useful, especially, if you want to create mail merges, reports, or if you want to send your data to a mailing house for address updating. Once you create an export record, you can edit and reuse it as you update your database. The appearance of the export data files may differ depending on the export format you select. For more information about export formats, see "Export Formats" on page 140. The following procedure takes you step-by-step through two of the ways in which you create an export. The export types may differ, but the process for creating an export is the same for all export types. For more information about export types, see "Export Types" on page 139.

▶ **Create a constituent export**

Warning: Your mailing house may accept only certain data formats. Most mailing houses want exported data in the CSV, fixed length, or Excel formats. We suggest you contact your mailing house for specific information about the data formats they accept.

A constituent export gives you access to all information stored in a constituent record. This type of export is useful because it considers both individual and organization records in your database. From this type of export you can access constituent information, gift, relationship, address, action, membership (with *Member Management*), event (with *Event Management*), volunteer (with *Volunteer Management*), prospect (with *Prospect Research Management*), and honor/memorial (with *Honor/Memorial Tracking*) information for all constituents found in your database.

Scenario: You are preparing to validate the preferred addresses for constituents in your database. The mailing house you use is very strict and wants to make sure you include import IDs in your export, in addition to the address information you want to verify. You also want to include the type of address displayed for each constituent and the source for the address information. For this example, use the Comma-Separated Value (CSV) export format.

Warning: If you do not have rights to certain records in *The Raiser's Edge*, you do not see that export type on the Create a New Export screen. For example, if you do not have rights to gift records, you do not see the export type of Gift. For more information about Security, see the *Configuration & Security Guide*.

1. From the Export page, click **New Export**. The Create a New Export screen appears. For more information about accessing the Export page, see "Navigate in Export" on page 132.

Note: You can establish your export type and format preferences in User Options. For more information about Export User Options, see "Export User Options" on page 137.

2. In the **What type of export do you want to create** box, select Constituent.

3. In the **Export format** field, select Comma-Separated Values.

4. Mark **Include Header**. You want the first row of your export to contain the header names for the fields selected.

5. Click **Create Now**. The New Constituent Export record screen appears.

Note: If you select **All Records**, you consider all records found in your database for the export. If you choose **Selected Records**, you must use a query. If you select **One Record**, you locate and use a specific record in your database.

6. On the General tab, click **Include** to select the specific records to include in the export. For more information about the **Include** button, see "Understand the Include Options" on page 145. Select **All Records** to consider all constituent records in the database for your export.

7. In the '**Head of Household' Processing** frame, select **Export both constituents separately** to specify that each constituent should have his criteria appear in the export.

    In *Export* processing, "Head of Household" can determine who should be exported from a constituent record. For example, when you make a spouse a constituent in your database, or if the spouse is already a constituent in your database, a **"Head of Household"** checkbox appears on the General tab of the individual relationship record. If you do not mark this checkbox for the spouse, the constituent on the Bio 1 tab is automatically "Head of Household".

    If you select **Export only constituent marked 'Head of Household'**, on the General tab in *Export*, only the constituent marked Head of Household is selected for your export. If you select **Export first constituent found**, the first constituent found in the database exports.

8. Unmark all the checkboxes in the **Include these Constituents** frame. You want to exclude inactive, deceased, and constituents with no valid address.

Note: We recommend that you print a control report. The control report lists the location of the newly created file and the order of the exported fields. You can do this by selecting **Print** on the General tab or by clicking print on the control report preview screen.

9. Mark the **Create control report** checkbox to create a control report for the constituent export. A control report summarizes the export's characteristics and field criteria.

10. Select the **Preview** option so you can preview the control report.

Note: The first field in the **Output** box of an export is either the export's name (for saved exports) or the export type (for exports not saved).

11. Select the Output tab.

Tip: You can use **Find** to quickly access a field.

12. In the **Show** field, select a specific group of fields, or select "<All>" to see a complete list of Available Field categories.

13. Click the plus sign to the left of the group name to reveal criteria fields under each group. Expand the Constituent Information group to reveal **Import ID**, **First Name**, **Last Name**, and **Org Name**. Click the Address, Preferred Address criteria group to reveal **Address line 1**, **Address line 2**, **City**, **State**, **ZIP**, **Type**, and **Info source**.

Tip: You can also drag the highlighted field and drop it into the **Output** frame or double-click on the field in the **Available Fields to Export** box.

14. Highlight **Import ID** and click **Select**. The selected output criteria field and its parent criteria group appear in the **Output** box.

15. Repeat steps 13 and 14 to move the remaining criteria fields used in this example from the **Available Fields to Export** box to the **Output** box. For more information about criteria groups, see "Understand Criteria Groups" on page 147.
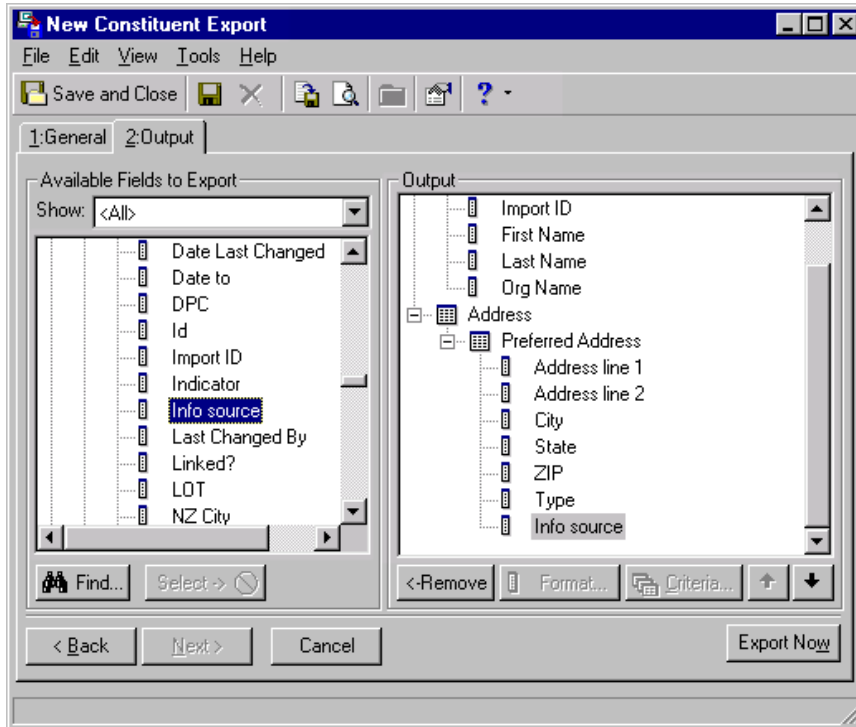
Note: You can set a default location on the File Locations tab in User Options. For more information, see "Export User Options" on page 137.

16. Click **Export Now**. The Export file name screen appears.
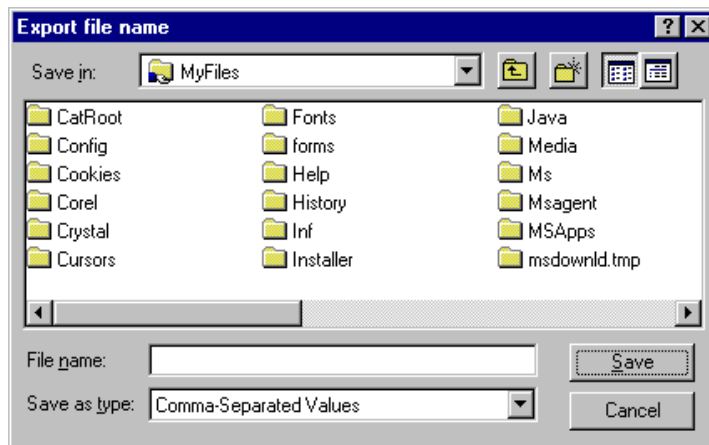
17. In the **Save in** field, assign a location to your data file. For example, you may want to save this to C:\MyFiles, or another folder in which you prefer to store information.

18. In the **File name** field, enter "ConstituentAddress.csv" to name the data file for the export.

19. The value in the **Save as type** field defaults to the export type you selected on the Create a New Export screen.
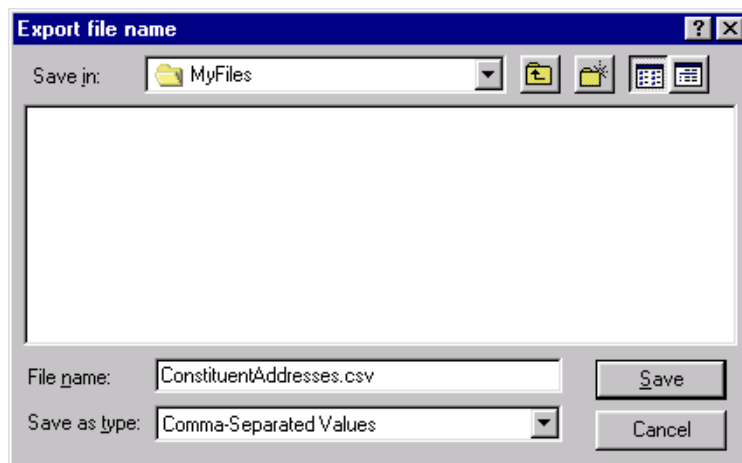
Note: When you click **Save** on the Export file name screen, the data file you are saving contains information exported from your database. Later in this procedure, you will save the export record, which contains the criteria established on the General and Output tabs to use in other exports.

20. Click **Save**. The export processes, and you receive a message letting you know how many records were exported and the processing time.
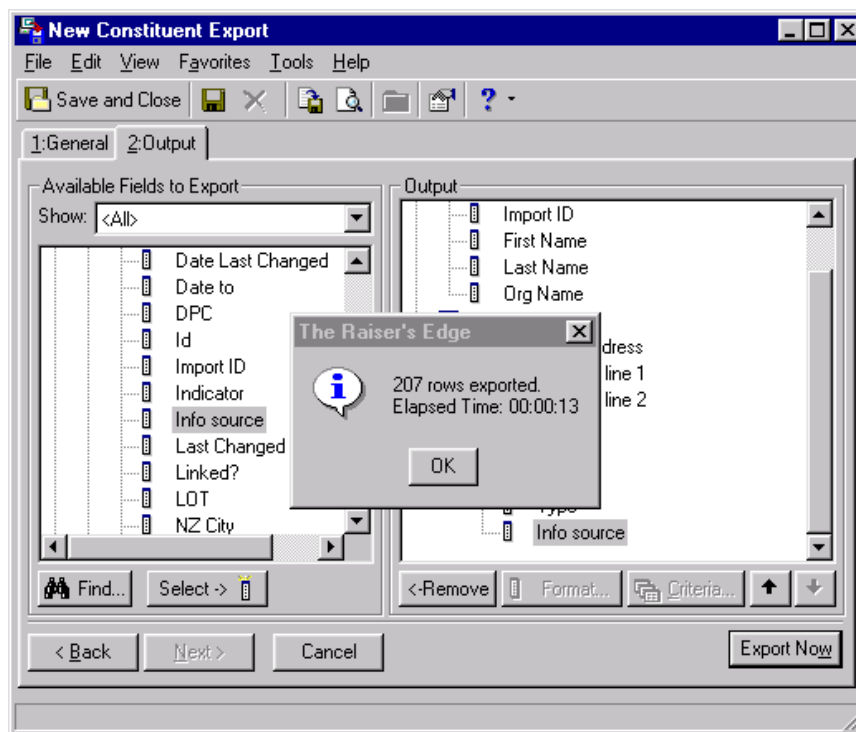
Note: We recommend you print a control report. The control report lists the location of the newly created data file and the order of the exported fields. You can do this by selecting **Print** on the General tab or by clicking **Print** on the New Export Control Report preview screen.

21. Click **OK**. Because you marked the **Create control report** checkbox and selected **Preview** on the General tab, the New Export Control Report preview screen appears.
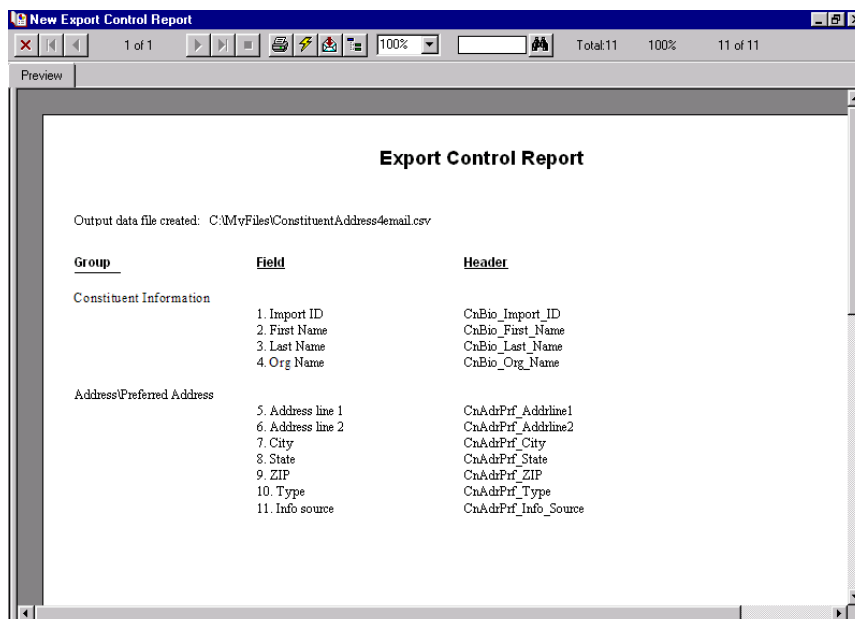
22. To print the Export Control Report, click **Print** on the toolbar.
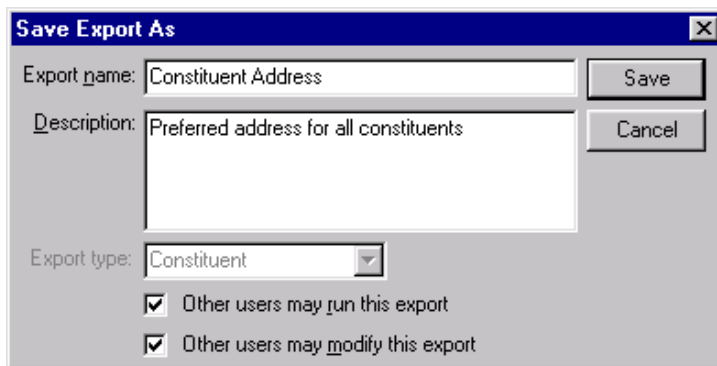
23. To close the preview screen, click the red "X" on the left hand top corner of the screen. You return to the export record.

24. From the menu bar, select **File**, **Save As** to save the export record. The Save Export As screen appears.

25. In the **Export name** field, enter "Constituent Address".

26. In the **Description** field, enter "Preferred address for all constituents".

27. The **Export type** field is disabled because you selected Constituent in the Create a New Export screen.

28. To authorize other users to run your export, mark the **Other users may run this export** checkbox.

29. To authorize other users to change your export, mark the **Other users may modify this export** checkbox.

30. Click **Save**. The export record is saved and appears in the list on the Export page.

31. From the menu bar, select **File**, **Close** to exit the export record.

▶ **Create a gift export**

Using a gift export you can extract all gift information found in your database. This type of export is especially helpful if you want to extract information for further analysis or for graphing. When you select to perform a gift export, you extract information from the gift record of each constituent. If a constituent has more than one gift that meets the criteria of your export, each gift is included in the data file.

> **Scenario:** You are preparing for your upcoming Annual Campaign and decide to create a small, custom report on constituent giving information in 2001. You want to include the first name, last name, address information, and a summary of total gift information to get an idea of who you can expect to contribute to the Annual Campaign for the current year. You export this information from *Export* to Microsoft *Excel* where you will finalize the report.

Warning: If you do not have rights to certain records in *The Raiser's Edge*, you do not see that export type on the Create a New Export screen. For example, if you do not have rights to gift records, you do not see the export type of Gift. For more information about Security, see the *Configuration & Security Guide*.

1. From the Export page, click **New Export**. The Create a New Export screen appears. For more information about accessing the Export page, see "Navigate in Export" on page 132.

Note: You can establish your export type and format preferences in User Options. For more information about Export User Options, see "Export User Options" on page 137.

2. In the **What type of export do you want to create** box, select Gift.

3. In the **Export format** field, select Excel 5-7 (XLS), or another version of Excel if this does not apply to you.
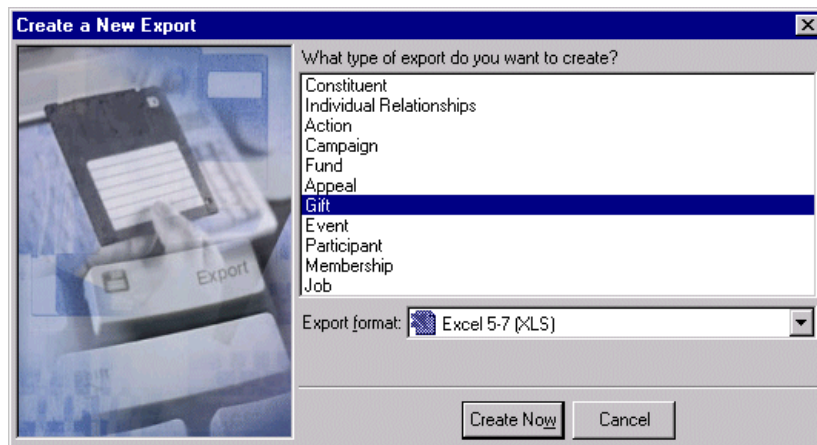
4. Click **Create Now**. The New Gift Export screen appears.
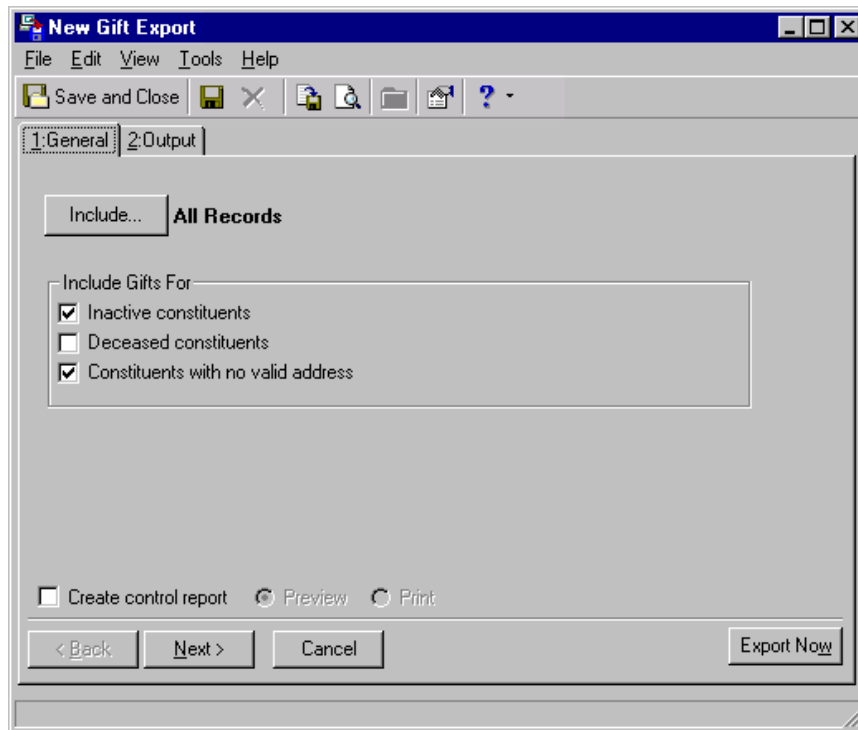
5. On the General tab, click **Include** to select the specific records to include in the export. For more information about the **Include** button, see "Understand the Include Options" on page 145. Select **All Records** to include all gift records in the export.

6. Unmark all the checkboxes in the **Include Gifts For** frame. You want to exclude gifts from inactive, deceased, and constituents with no valid address.

7. Mark the **Create control report** checkbox to create a control report for the constituent export. A control report summarizes the export's characteristics and field criteria.

8. Select the **Preview** option so you can preview the control report.
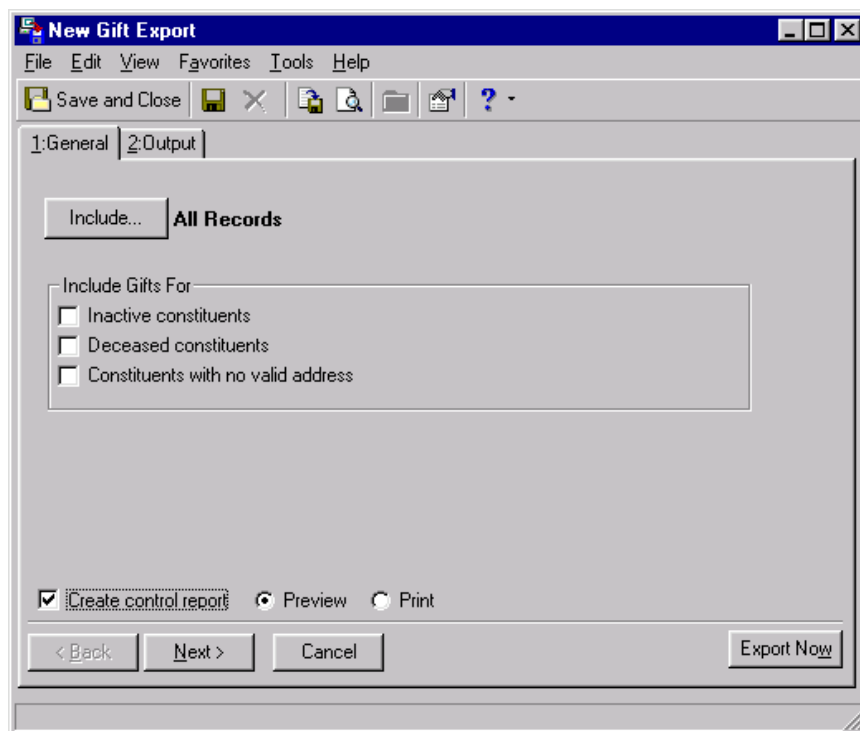
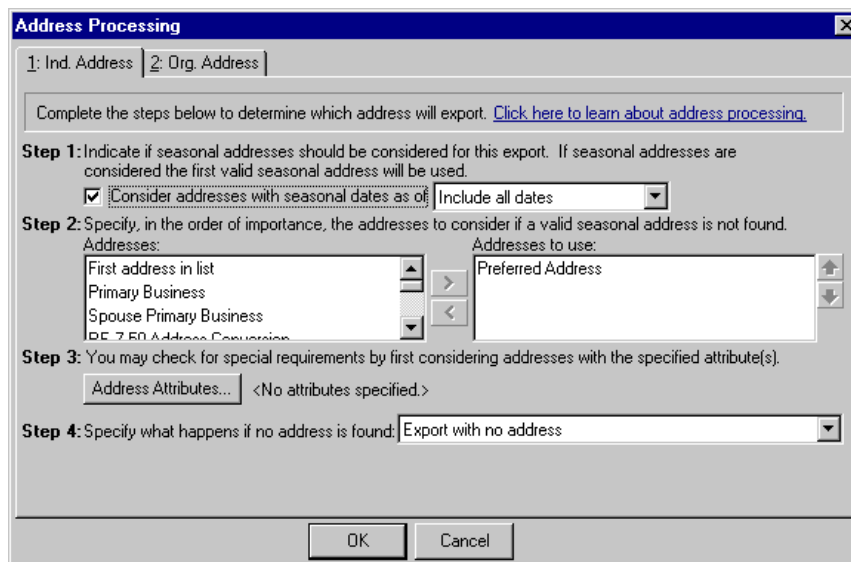

Note: The first field in the **Output** box of an export is either the export's name (for saved exports) or the export type (for exports not saved).
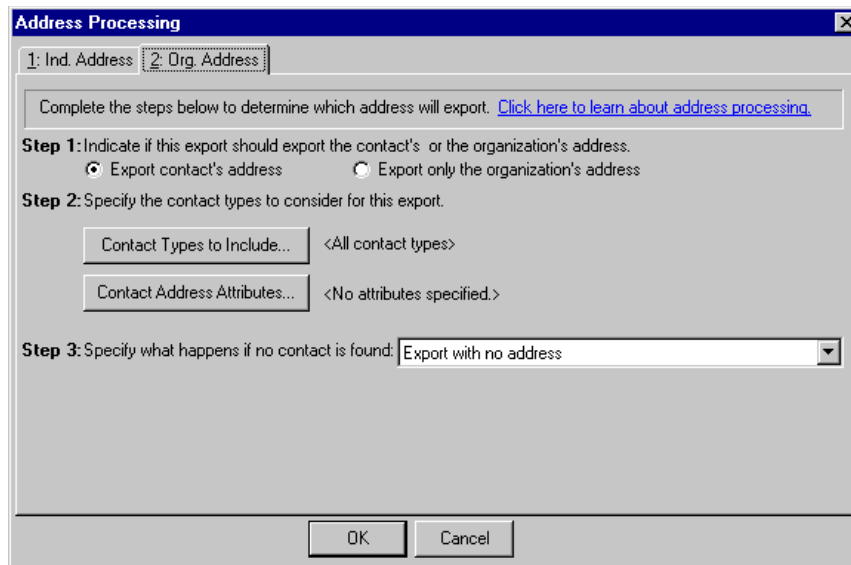
9. Click **Next**. The Output tab appears.
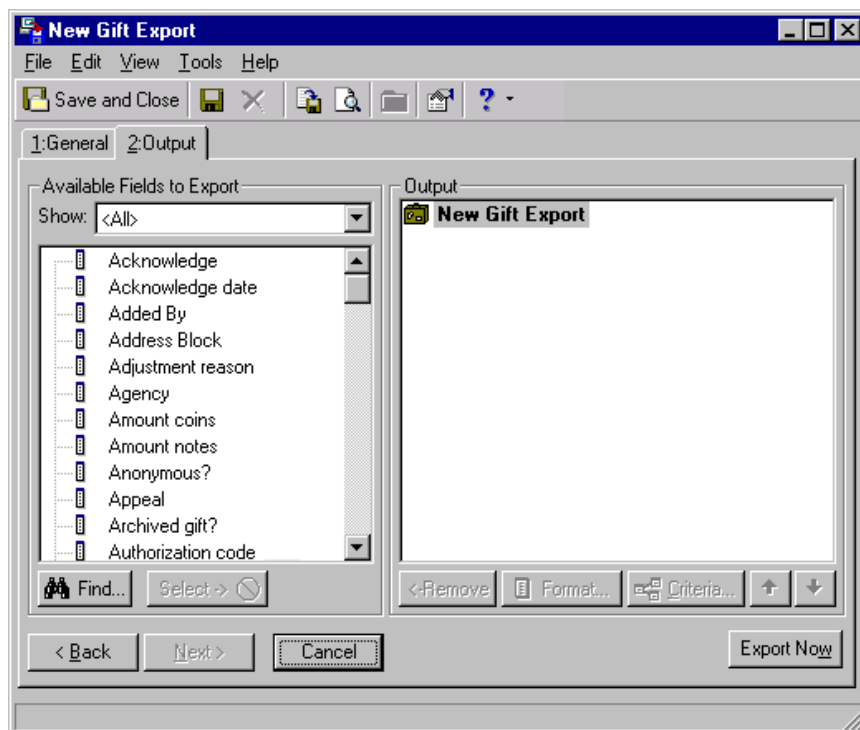
Tip: You can use **Find** for quick access to a field.

10. In the **Show** field, select a specific group of fields, or select "<All>" to see a complete list of Available Fields categories.

11. Click the plus sign to the left of the group name to reveal criteria fields under each group. Expand the Constituent, Constituent Information group to reveal **First Name**, **Last Name**, and **Address**, and click Constituent, Summary Information, Gifts group to reveal **Total Gift amount**.

Tip: You can also drag the highlighted field and drop it into the **Output** box or double-click on the field in the **Available Fields to Export** box.

12. Highlight **First Name** and click **Select**. The selected output criteria field and its parent criteria category appear in the **Output** box.

13. Repeat steps 11 and 12 to move the **Last Name** and **Address** fields from the **Available Fields to Export** box to the **Output** box. For more information about criteria groups, see "Understand Criteria Groups" on page 147.
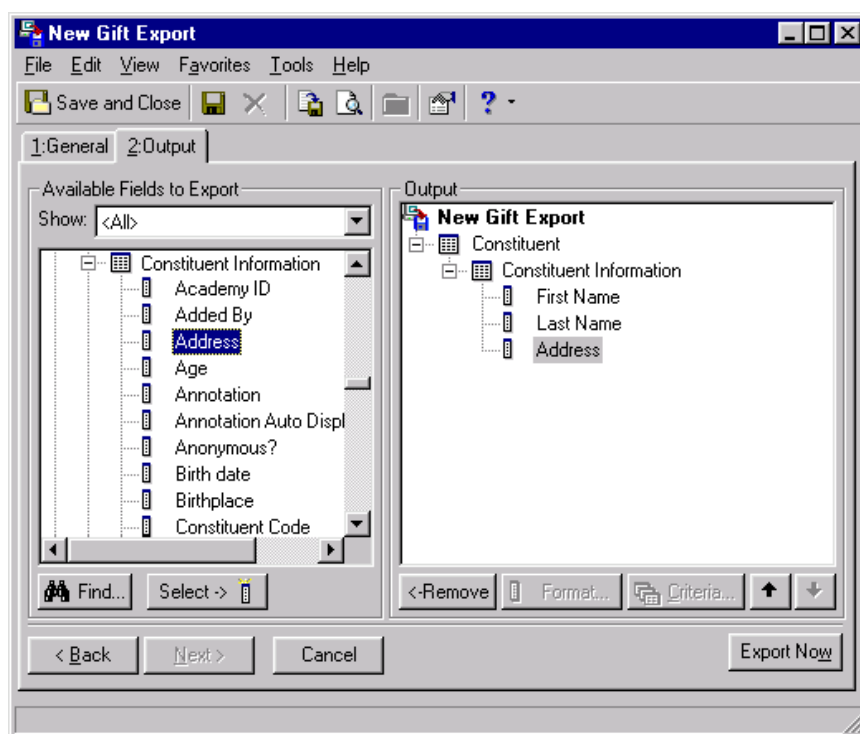
14. In the **Available Fields to Export** box, highlight **Total Gift amount** and click **Select**. The Gifts Criteria screen appears.

Note: You can install sample exports in *The Raiser's Edge*. Some of these queries save the time it takes to create them yourself. Others may serve as a starting point to get the specific results you are seeking. To access the Sample Installer, select **Tools**, **Install Samples** from the shell menu bar. For more information about installing samples for your database, see the Program Basics chapter in the *Program Basics Guide*.

15. In the **Date to use** field, in the **Include Gifts with these Dates** frame, select "Gift date".

16. In the **Date** field, select "<Specific Range>". The **Start** and **End** fields appear.

17. In the **Start** field, enter the date 01/01/2001.

18. In the **End** field, enter the date 12/31/2001.

19. Leave the fields blank in the **Include Gifts for these Amounts** frame. You can narrow down the information to export by entering start and end amounts in these fields.

20. In the **Soft Credit Gifts To** frame, select **Both** to export information for the donor and the recipient.

21. In the **Credit Matching Gifts To** frame, select **Both** to include information for the donor and the matching gift company. On the Gift Types tab, include all gift types.

22. Select the Filters tab.

23. In the **Include** column of the **Campaigns** filter, choose "Selected".

24. Click in the **Selected Filters** column. The binoculars appear. Click the binoculars. The Selected Campaigns screen appears.

25. In the **Include** field, select **Selected**.

   If you need to choose a campaign query, select **Query**. A **Query name** field appears with a binoculars button. Click the binoculars to browse for an existing campaign query.

26. Highlight "Annual Campaign". Click the single right arrow to move "Annual Campaign" from the box on the left into the **Include these Campaigns** box on the right.
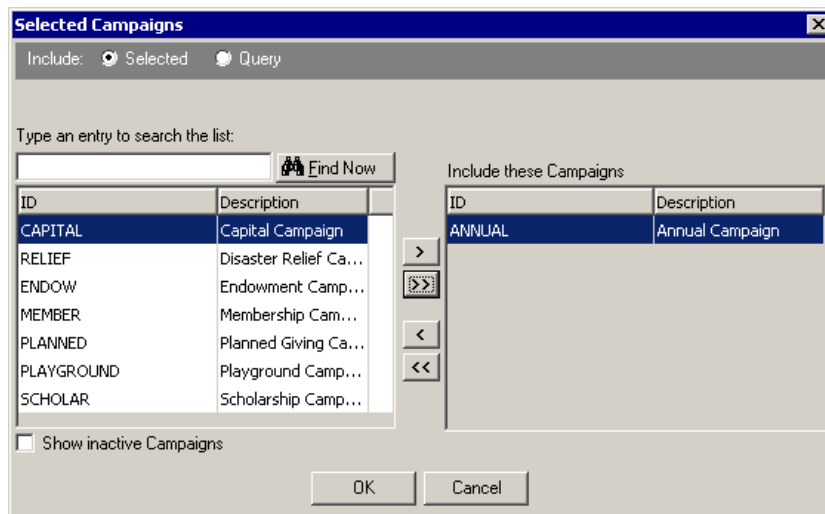
27. Click **OK**. You return to the Filters tab of the Gifts Criteria screen. "Annual Campaign" appears in the **Selected Filters** column on the **Campaigns** row.
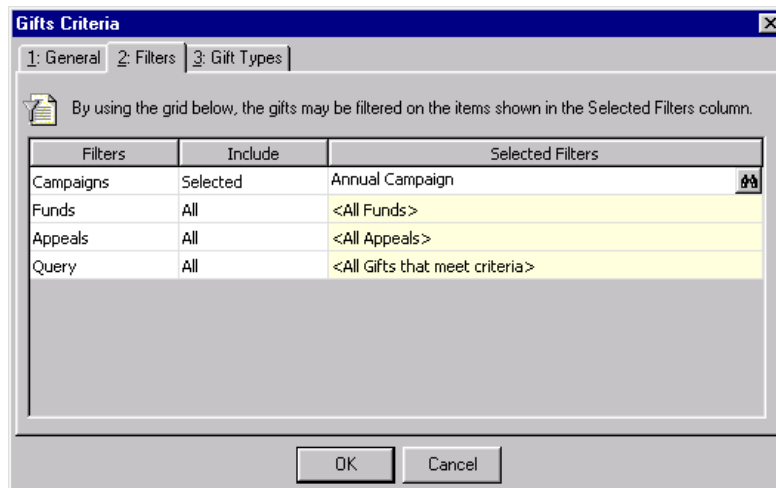
28. Select the Gift Types tab.
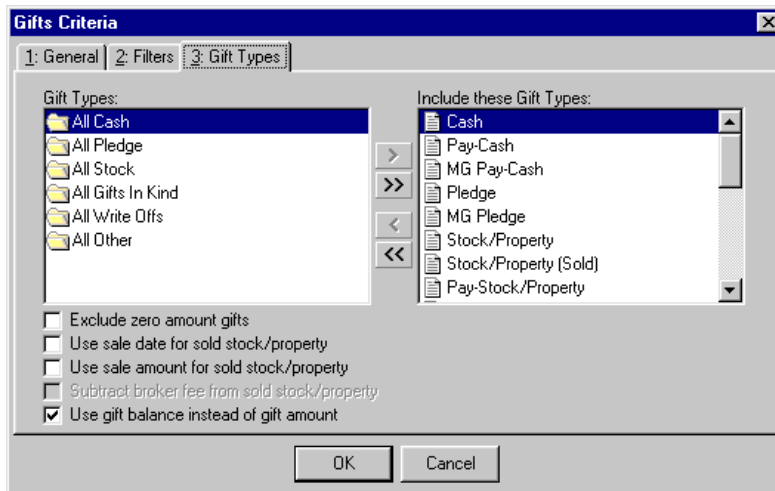
29. Leave the information that defaults automatically because you do not want to narrow your fields to export by any gift type information other than the default fields.

30. Click **OK**. You return to the Output tab.
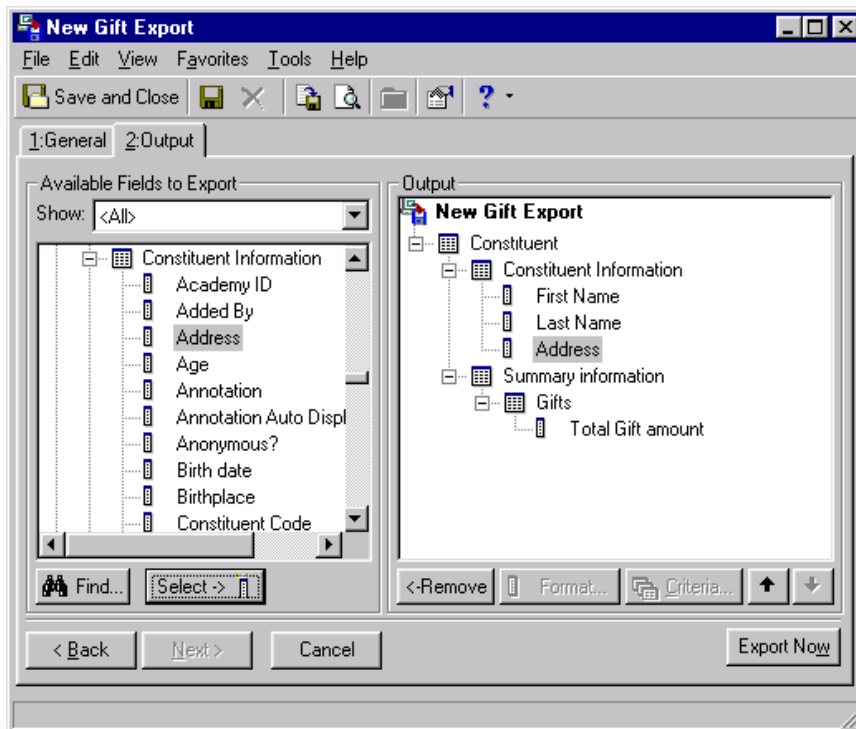
Note: You can set a default location on the File Locations tab in User Options. For more information, see "Export User Options" on page 137.

31. Click **Export Now**. The Export file name screen appears.
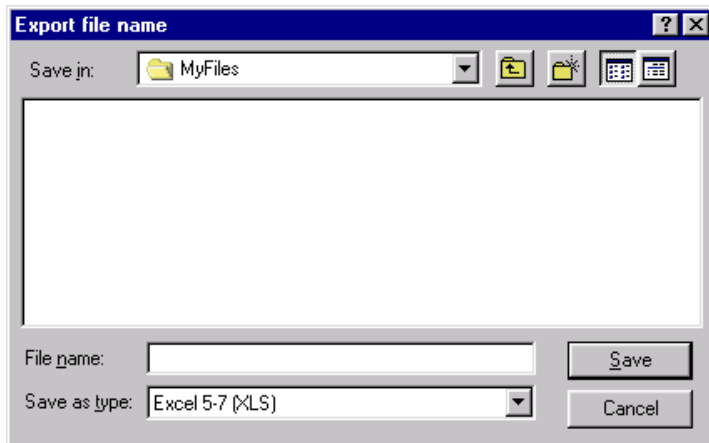
32. In the **Save in** field, assign a location to your data file For example, you may want to save this to C:\MyFiles, or another folder you prefer to store information.

33. In the **File name** field, enter "ConstituentGiving2001.xls" to name the data file for the export.

34. The value in the **Save as type** field defaults to the export type you selected on the Create a New Export screen.
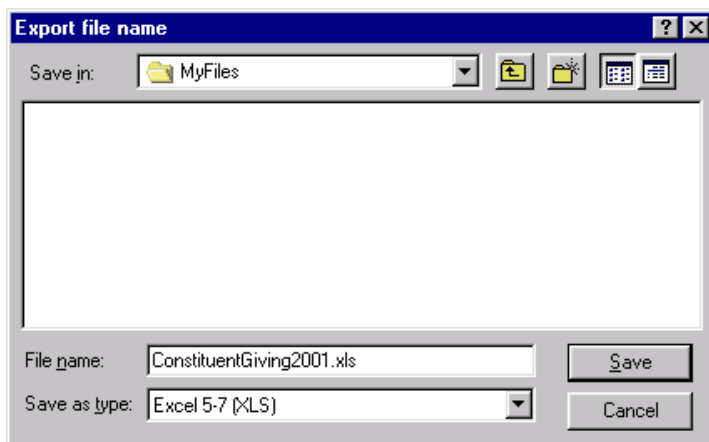
Note: When you click **Save** on the Export file name screen, the data file you save contains information exported from your database. Later in this procedure, you will save the export record, which contains the criteria established on the General and Output tabs to use in other exports.

35. Click **Save**. The export processes, and you receive a message letting you know how many records were exported and the processing time.
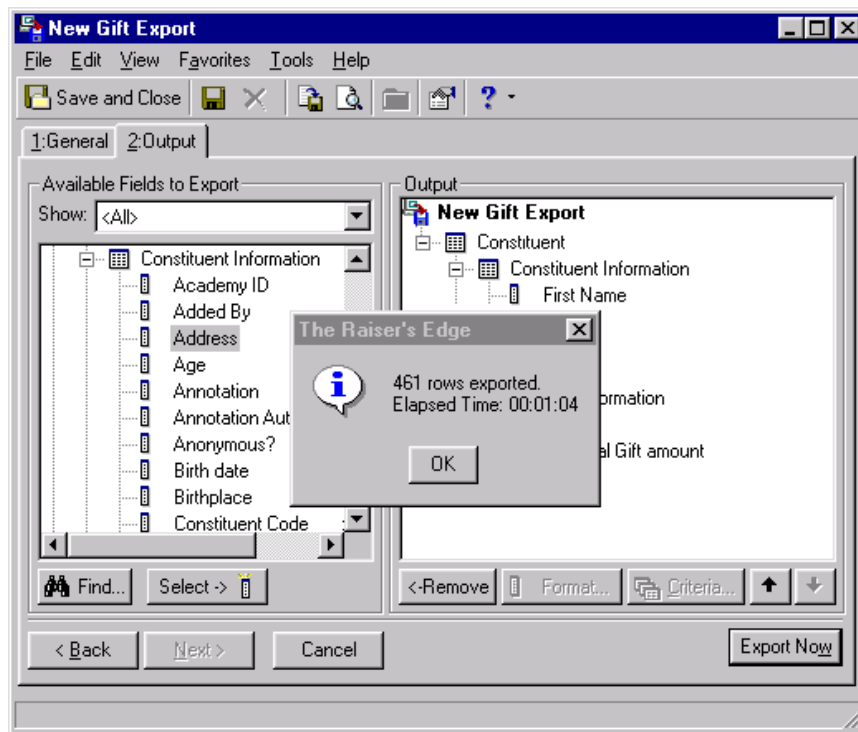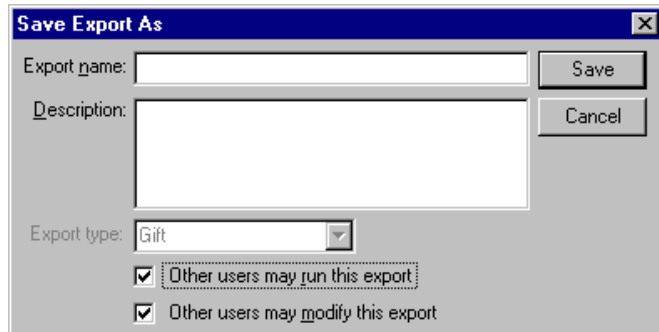
Note: We recommend you print a control report. The control report lists the location of the newly created file and the order of the exported fields. You can do this by selecting **Print** on the General tab or by clicking **Print** on the Control Report preview screen.

36. Click **OK**. Because you marked the **Create Control Report** checkbox and selected **Preview** on the General tab, the New Export Control Report preview screen appears.
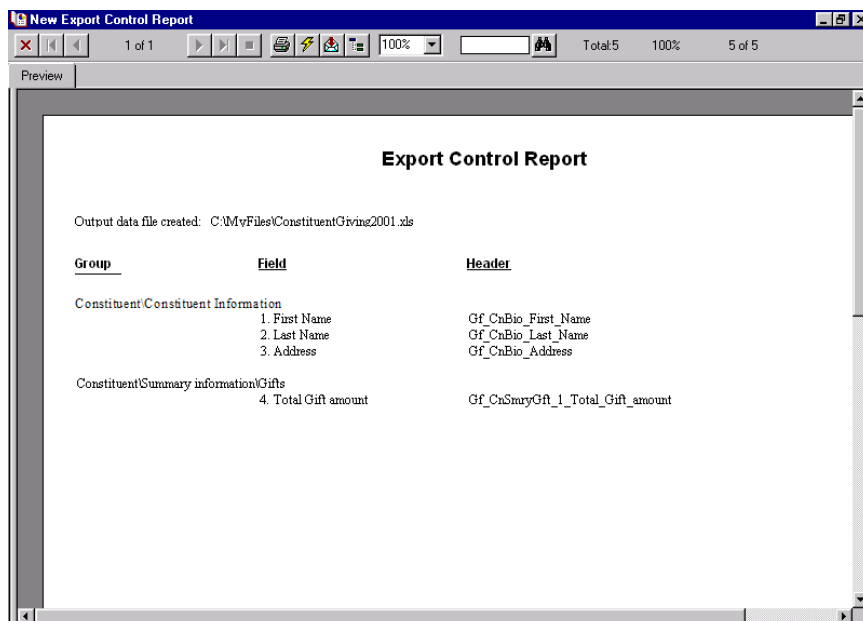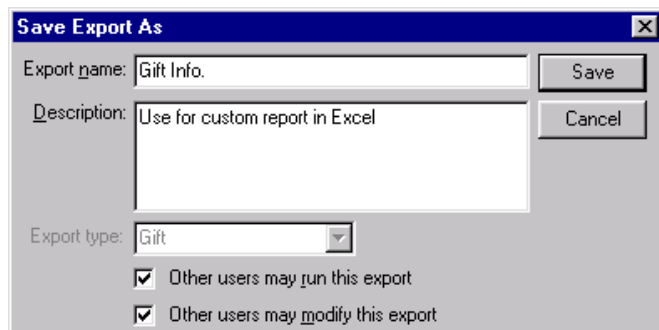
37. Click **Print** on the toolbar to print the Export Control Report.

38. To close the preview screen, click the red "X" on the left hand top corner of the screen. You return to the export record.

39. From the menu bar, select **File**, **Save** to save the export record with the criteria fields selected on the General and Output tabs. The Save Export As screen appears.

40. In the **Export name** field, enter "Gift Info.".

41. In the **Description** field, enter "Use for custom report in Excel".

42. The **Export type** field is disabled because you selected Gift on the Create a New Export screen.

43. To authorize other users to run your export, mark the **Other users may run this export** checkbox.

44. To authorize other users to change your export, mark the **Other users may modify this export** checkbox.

45. Click **Save**.

46. From the menu bar, select **File**, **Close** to exit the export record. The export record appears in the list on the Export page.

▶ **Export contact name and address information**

When you export contact information, there are several reasons the contact information you intend to export does not export. For example, the day you export the contact information may fall outside of the **Date from** and **Date to** dates in the contact relationship record. Also, to export contact information, you must mark the **Contact** checkbox on the Relationships tab and make sure you do not mark the **Do not mail to this contact** checkbox in this same frame. For more information about relationships, see the Relationships chapter of the *Constituent Data Entry Guide*.

> *Scenario:* At the request of your Volunteer Director, you are going to send all the organizations in your database a letter to recruit new volunteers. You want to personalize these letters to organizations by including the contact name and address information. Select all the contact information you need for your letter and use the Microsoft Word Merge File format to export the data for your mailing house.

> **Note**: If you need to export contact information for your own mail merge, you should select the Blackbaud Simple Word Merge format or Blackbaud Conditional Word Merge format. When you select one of these formats, *The Raiser's Edge* integrates with *Word* to generate mail merge letters quickly and easily. For more information about using *The Raiser's Edge* with *Word* to generate mail merge letters, see the Mail Merge With Microsoft Word chapter in the *The Raiser's Edge & Microsoft Integration Guide*.

1. From the Export page, click **New Export**. The Create a New Export screen appears. For more information about accessing the Export page, see "Navigate in Export" on page 132.
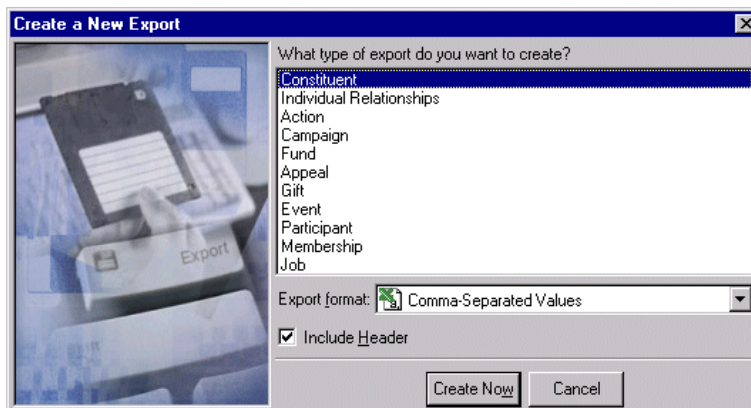
2. In the **What type of export do you want to create** box, select Constituent.

   You can establish your export type and format preferences in User Options. For more information about Export User Options, see "Export User Options" on page 137

3. In the **Export format** field, select Microsoft Word Merge File.

4. Mark **Include Header**. You want the first row of your export to contain the header names for the fields selected.
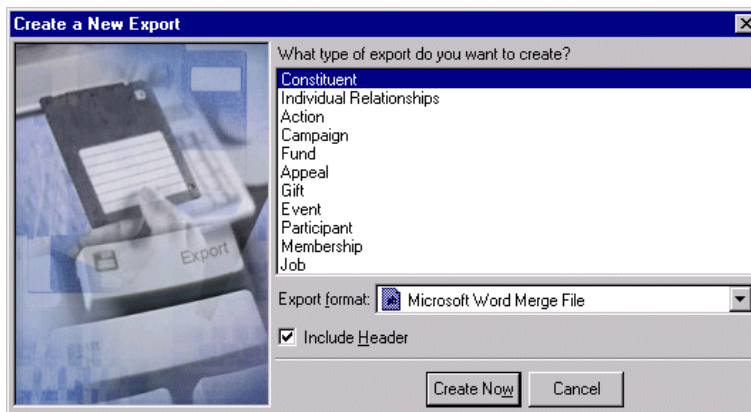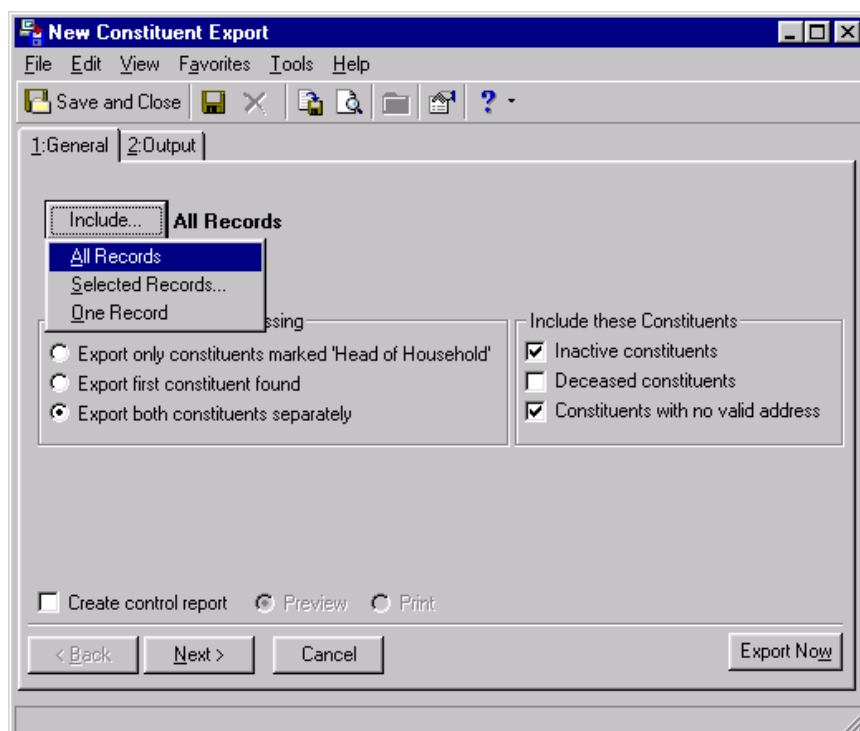

5. Click **Create Now**. The New Constituent Export screen appears.
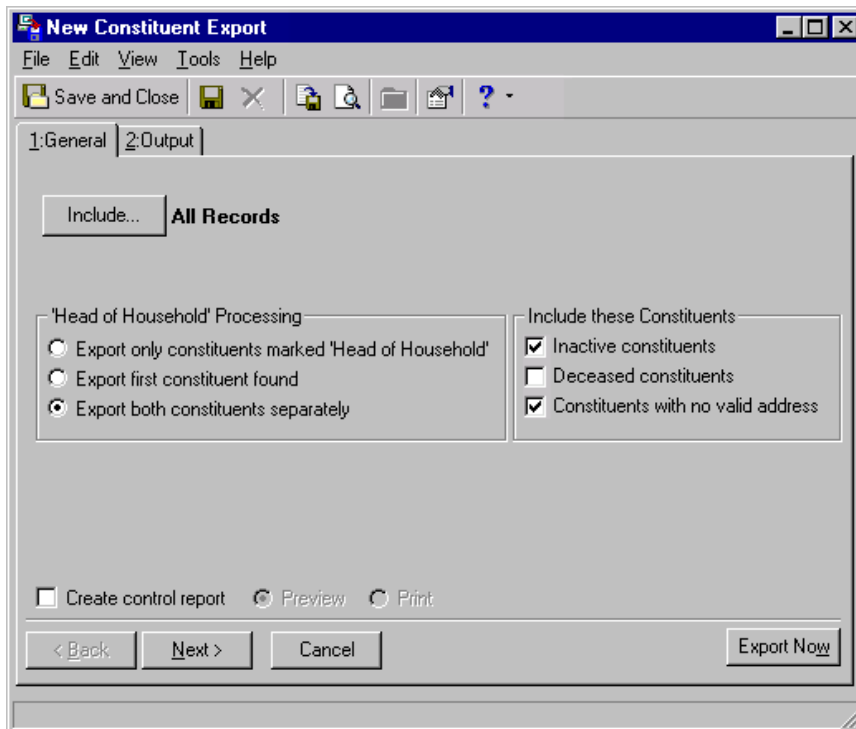
6. On the General tab, click **Include** to select the specific records to include in the export. For more information about the **Include** button, see "Understand the Include Options" on page 145. Select **All Records** to include all records in the database in this export.

Note: If you are exporting organization records only, your selection in the **'Head of Household" Processing** frame does not matter. Organization records do not have the **Head of Household** checkbox. For more information about organization records, see the Biographical Information chapter in the *Constituent Data Entry Guide*.

7. In the '**Head of Household' Processing** frame, select **Export both constituents separately** to specify that each constituent should have his criteria appear in the export.

In *Export* processing, "Head of Household" can determine who should be exported from a constituent record. For example, when you make a spouse a constituent in your database, or if the spouse is already a constituent in your database, a **"Head of Household"** checkbox appears on the General tab of the individual relationship record. If you do not mark this checkbox for the spouse, the constituent on the Bio 1 tab is automatically "Head of Household".

If you select **Export only constituent marked 'Head of Household'**, on the General tab in *Export*, only the constituent marked Head of Household is selected for your export. If you select **Export first constituent found**, the first constituent found in the database exports.

8. Unmark all the checkboxes in the **Include these Constituents** frame. You want to exclude inactive, deceased, and constituents with no valid address.

9. Mark the **Create control report** checkbox to create a control report for the constituent export. A control report summarizes the export's characteristics and field criteria.

10. Select the **Preview** option so you can preview the control report.
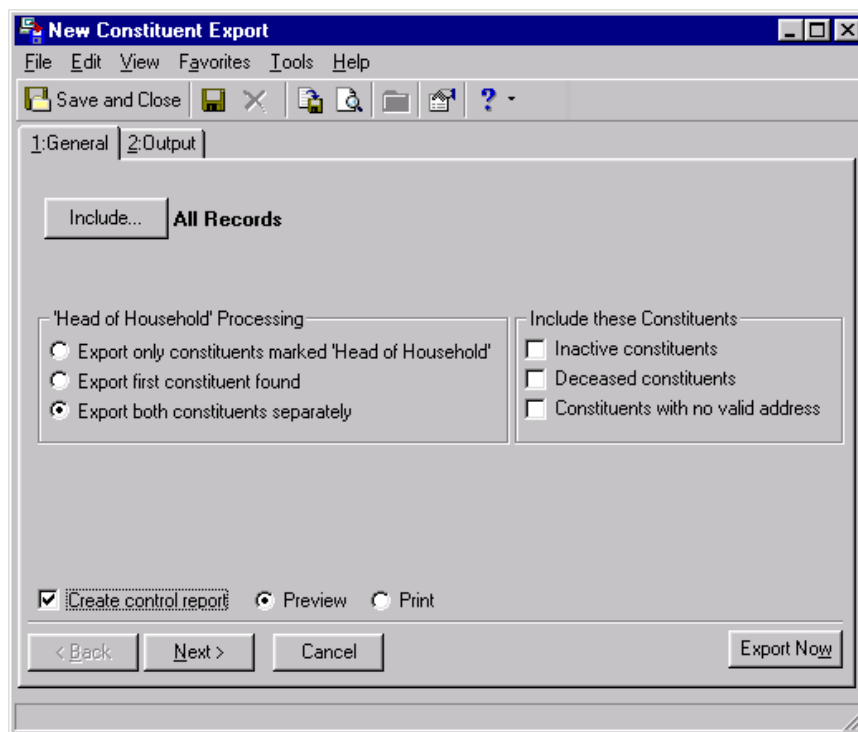
Note: The first field in the **Output** box of an export is either the export's name (for saved exports) or the export type (for exports not saved).

11. Click **Next**. The Output tab appears.
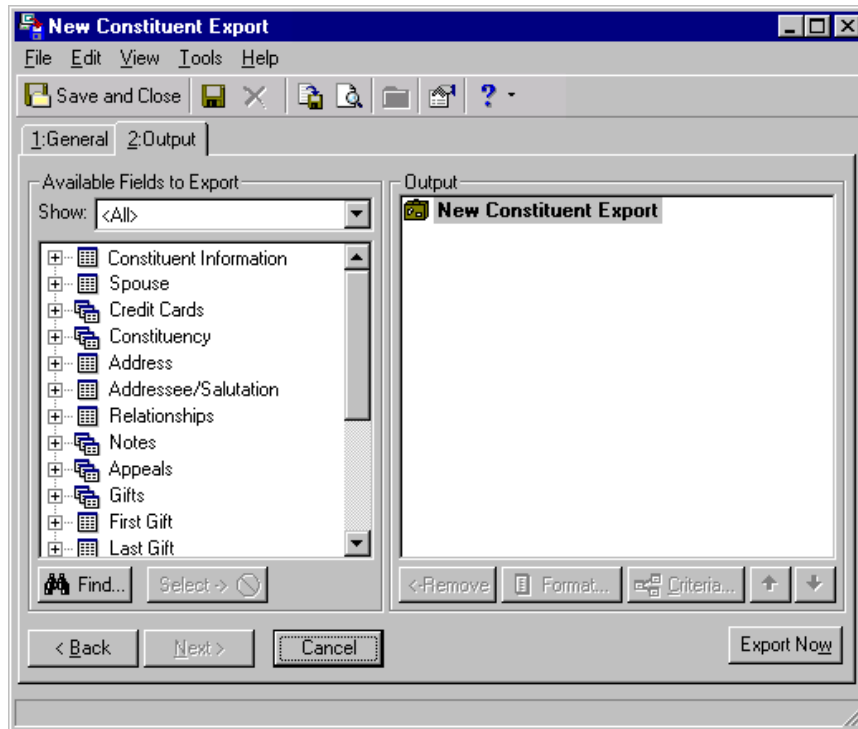
12. In the **Show** field, select a specific group of fields, or select "<All>" to see a complete list of Available Field categories.

13. Click the plus sign to the left of the group name to reveal criteria fields under each group. Expand the Constituent Information group to reveal **Org Name**. Expand the Address, Address Processing group to reveal **Address line 1**, **Address line 2**, **City**, **State**, and **ZIP**. Within this same group, click the plus sign to the left of the Contact group to reveal the contact **Primary Addressee** field.

14. Highlight **Org Name** and click **Select**. The selected output criteria field moves to the **Available Fields to Export** box to the **Output** box.

15. Highlight **Address line 1** and click **Select**. The Address Processing screen appears.

16. Select the Org. Address tab.

17. In Step 1, select **Export contact's address**.

18. Click **OK**. The selected output criteria field and its' parent criteria group appear in the **Output** box.

19. Repeat this step to move **Address line 2**, **City**, **State**, **ZIP**, and contact **Primary Addressee** from the **Available Fields to Export** box to the **Output** box. For more information about criteria groups, see "Understand Criteria Groups" on page 147.
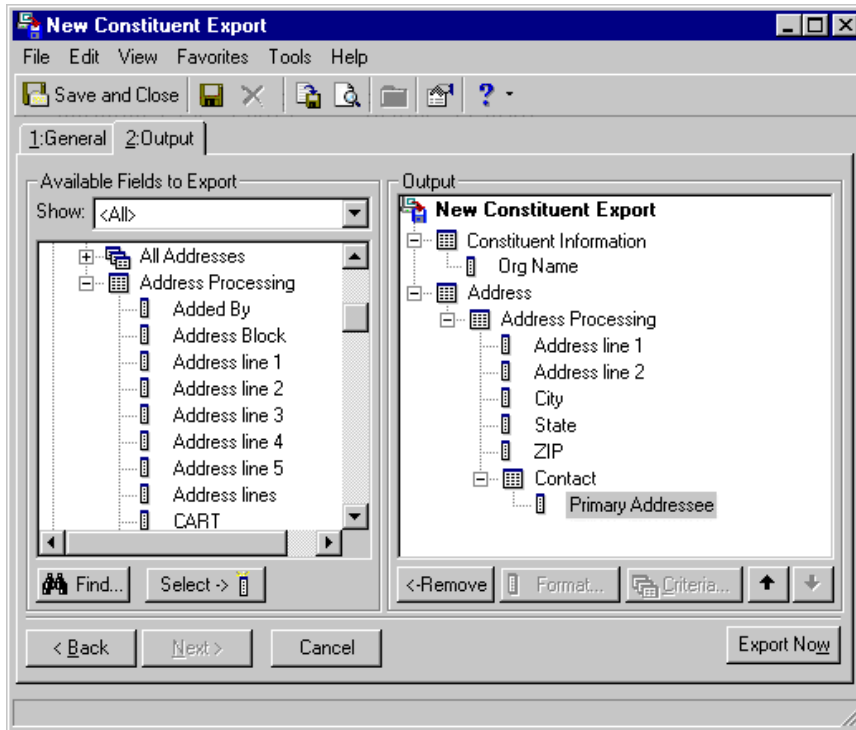
To change the order of the items in the **Output** box, use the up and down arrow keys.

Note: You can set a default location on the File Locations tab in User Options. For more information, see "Export User Options" on page 137.

20. Click **Export Now**. The Export file name screen appears.
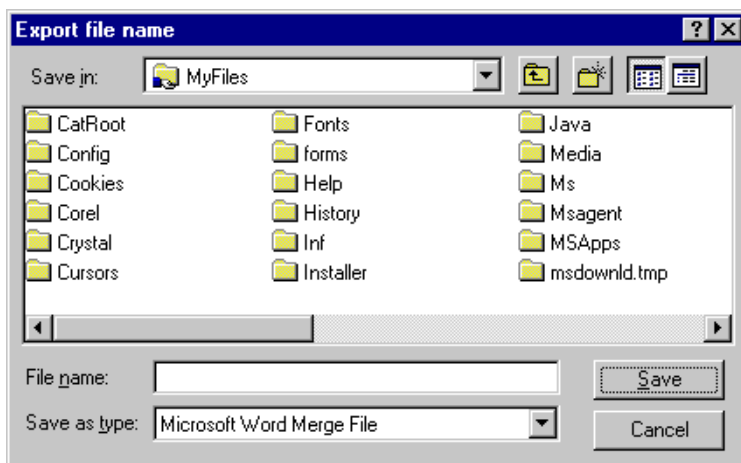
21. In the **Save in** field, assign a location to your data file. For example, you may want to save this to C:\MyFiles, or another folder in which you prefer to store information.

22. In the **File name** field, enter "Contacts.dat" to name the data file for the export.

23. The value in the **Save as type** field defaults to the export type you selected on the Create a New Export screen.
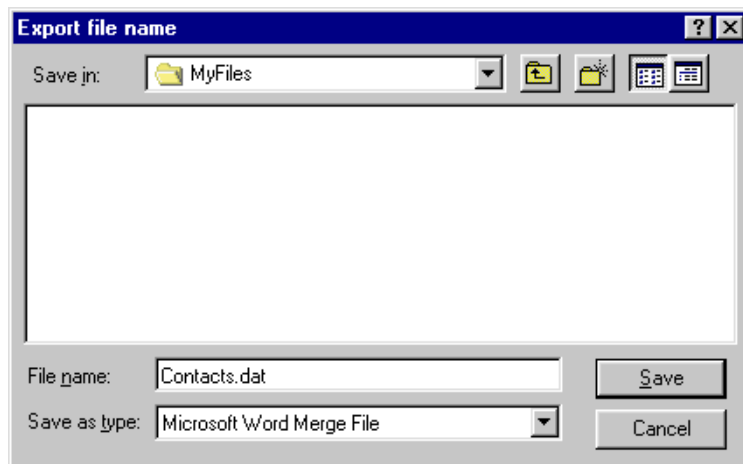
Note: When you click **Save** on the Export file name screen, the data file you are saving contains information exported from your database. Later in this procedure, you will save the export record, which contains the criteria established on the General and Output tabs to use in other exports.

24. Click **Save**. The export processes, and you receive a message letting you know how many records were exported and the processing time.
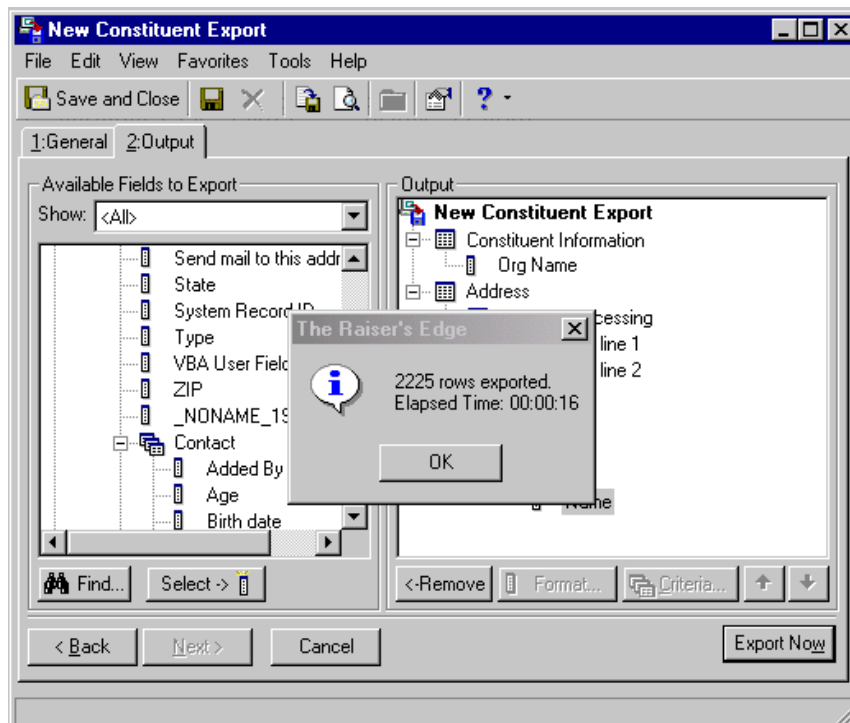
25. Click **OK**. Because you marked the **Create control report** checkbox and selected **Preview** on the General tab, the New Export Control Report preview screen appears.
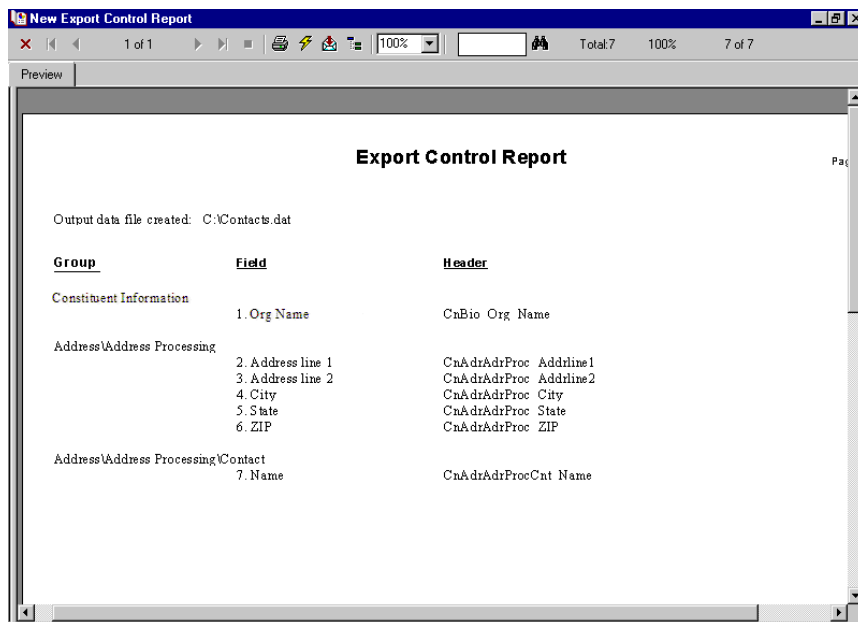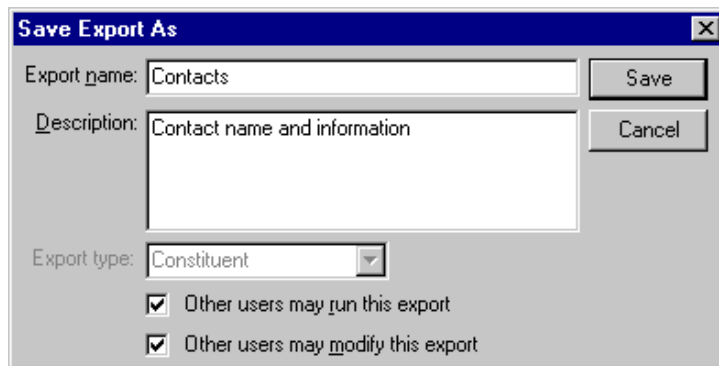
26. To print the Export Control Report, click **Print** on the toolbar.

27. To close the preview screen, click the red "X" on the left hand top corner of the screen. You return to the export record.

28. From the menu bar, select **File**, **Save As** to save the export record. The Save Export As screen appears.
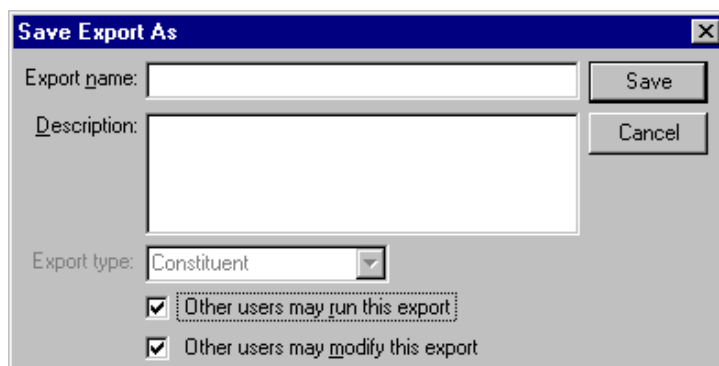
29. In the **Export name** field, enter "Contacts".

30. In the **Description** field, enter "Contact name and information".

31. The **Export type** field is disabled because you selected Constituent in the Create a New Export screen.

32. To authorize other users to run your export, mark the **Other users may run this export** checkbox.

33. To authorize other users to change your export, mark the **Other users may modify this export** checkbox.

34. Click **Save**. The export record is saved and appears in the list on the Export page.

35. From the menu bar, select **File**, **Close** to exit the export record.

▶ **Export one field multiple times using a separate set of parameters**

You can export the same field multiple times in *Export*. Certain fields allow you to select a separate set of parameters for the field. For example, you can select a separate set of parameters for the **Total Gift amount** field in a Constituent export. However, you cannot select a separate set of parameters for gift fields in a Gift export.

1. From the Export page, click **New Export**. The Create a New Export screen appears. For more information about accessing the Export page, see "Navigate in Export" on page 132.

2. In the **What type of export do you want to create** box, select Constituent.

You can establish your export type and format preferences in User Options. For more information about Export User Options, see "Export User Options" on page 137.

3. In the **Export format** field, select Comma-Separated Values.

4. Mark **Include Header**. You want the first row of your export to contain the header names for the fields selected.

5. Click **Create Now**. The New Constituent Export record screen appears.

Note: If you select **All Records**, you consider all records found in your database for the export. If you choose **Selected Records**, you must use a query. If you select **One Record**, you locate and use a specific record in your database.

6. On the General tab, click **Include** to select the specific records to include in the export. For more information about the **Include** button, see "Understand the Include Options" on page 145. Select **All Records** to consider all constituent records in the database for your export.

7. In the **'Head of Household' Processing** frame, select **Export both constituents separately** to specify that each constituent should have his criteria appear in the export.

   In *Export* processing, "Head of Household" can determine who should be exported from a constituent record. For example, when you make a spouse a constituent in your database, or if the spouse is already a constituent in your database, a **"Head of Household"** checkbox appears on the General tab of the individual relationship record. If you do not mark this checkbox for the spouse, the constituent on the Bio 1 tab is automatically "Head of Household".

   If you select **Export only constituent marked 'Head of Household'**, on the General tab in *Export*, only the constituent marked Head of Household is selected for your export. If you select **Export first constituent found**, the first constituent found in the database exports.

8. Unmark all the checkboxes in the **Include these Constituents** frame. You want to exclude inactive, deceased, and constituents with no valid address.

Note: We recommend that you print a control report. The control report lists the location of the newly created file and the order of the exported fields. You can do this by selecting **Print** on the General tab or by clicking print on the control report preview screen.

9. Mark the **Create control report** checkbox to create a control report for the constituent export. A control report summarizes the export's characteristics and field criteria.

10. Select the **Preview** option so you can preview the control report.

Note: The first field in the **Output** box of an export is either the export's name (for saved exports) or the export type (for exports not saved).

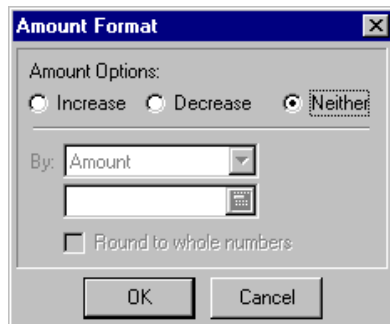11. Select the Output tab.

Tip: You can use **Find** to quickly access a field.

12. In the **Show** field, select a specific group of fields, or select "<All>" to see a complete list of Available Field categories.

13. Click the plus sign to the left of the group name to reveal criteria fields under each group. Expand the Summary Information, Gifts group to reveal **Total Gift amount**.

Tip: You can also drag the highlighted field and drop it into the **Output** frame or double-click on the field in the **Available Fields to Export** box.

14. Highlight **Total Gift amount** and click **Select**. The Gift Criteria screen appears.

15. In the **Date to use** field, in the **Include Gifts with these Dates** frame, select "Gift date".

16. In the **Date** field, select "<Specific Range>". The **Start** and **End** fields appear.

17. In the **Start** field, enter a start date.

18. In the **End** field, enter an end date.

19. In the **Include Gifts for these Amounts** frame, you can narrow down the information to export by entering start and end amounts in these fields.

20. In the **Soft Credit Gifts To** frame, select **Both** to export information for the donor and the recipient.

21. In the **Credit Matching Gifts To** frame, select **Both** to include information for the donor and the matching gift company. On the Gift Types tab, include all gift types.

22. Select the Filters tab.

23. To filter by a campaign, fund, appeal, or query, in the **Include** column of the appropriate filter, choose "Selected". For more information about the Filter tab, see "Create a gift export" on page 164.

24. Select the Gift Types tab.

25. Leave the information that defaults because you do not want to narrow your fields to export by any gift type information other than the default fields.

26. Click **OK**. You return to the Output tab.
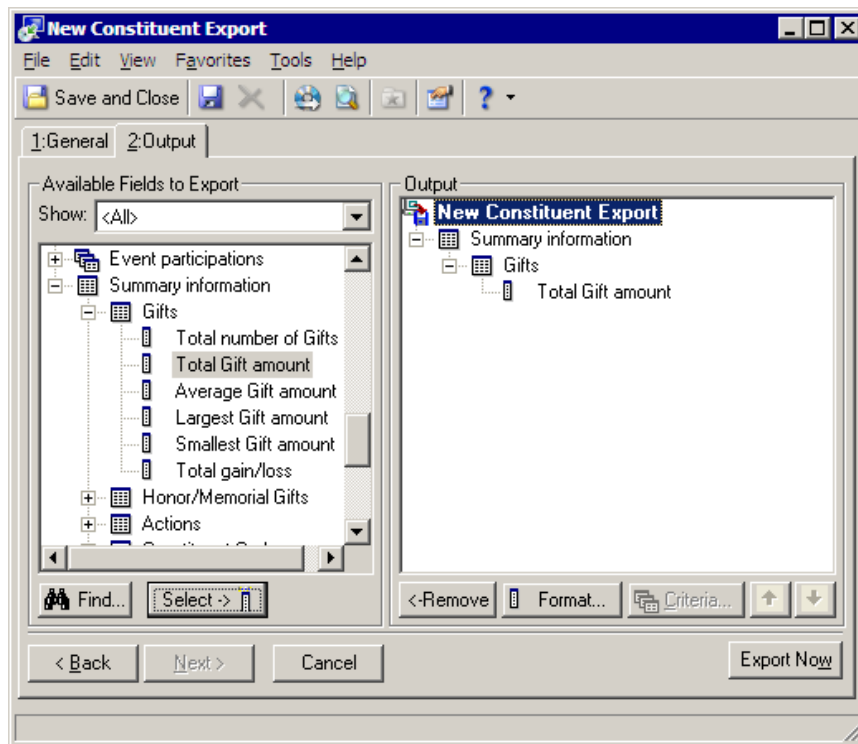
Warning: Make sure you do not highlight other fields in the **Output** box. If you do, you are not asked to select new parameters for the export. For example, Total Gift amount is highlighted in the **Output** box. You select the **Total Gift amount** field from the **Available Fields to Export** box for the second time for the export. The field appears in the **Output** box. The Gift Criteria screen does not appear for you to select a second set of parameters.

27. In the **Output** box, select the name of the export. For example, highlight New Constituent Export.

28. Beginning with step 13, repeat the previous steps to complete the export for the same field using separate parameters.

Multiple fields appear under a new node and end with a number. For example, the second time you select the **Total Gift amount** field, it appears in the **Output** box under the Gifts 2 node.
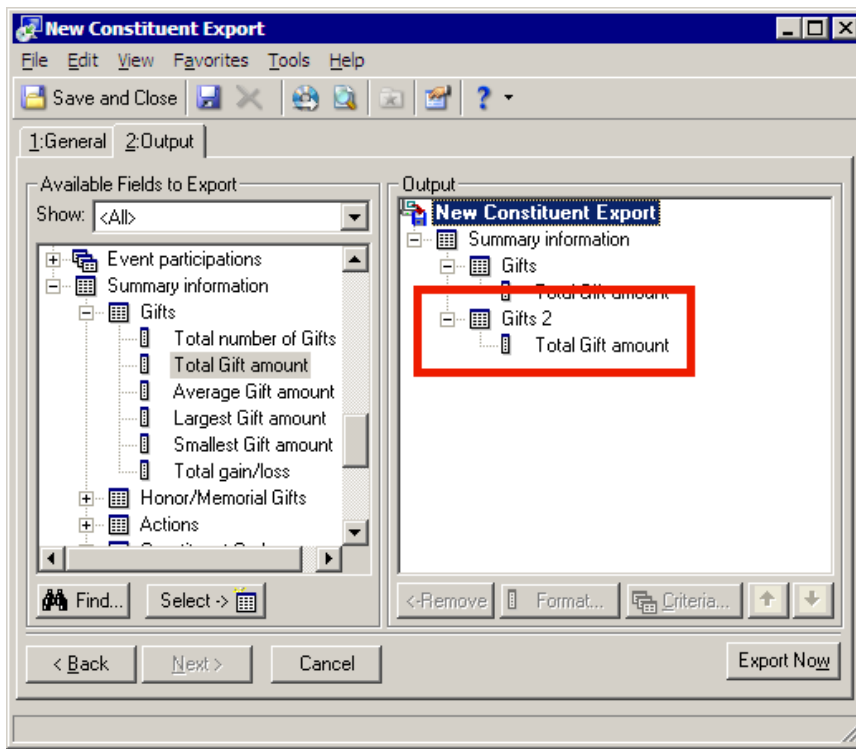
29. Click **Export Now**. The Export file name screen appears.
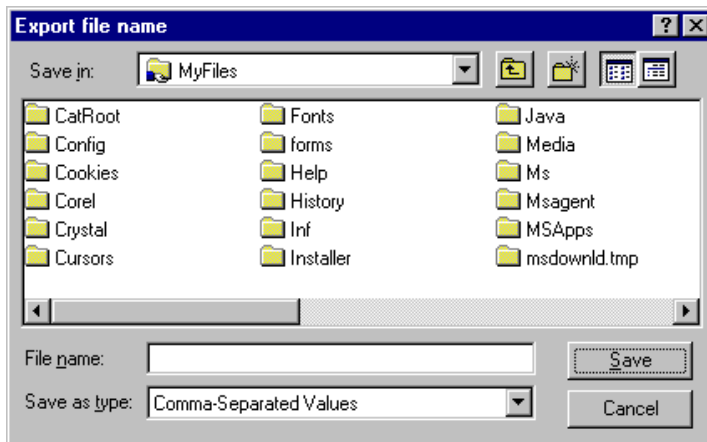
30. In the **Save in** field, assign a location to your data file. For example, you may want to save this to C:\MyFiles, or another folder in which you prefer to store information.

31. In the **File name** field, enter a name the data file for the export.

32. The value in the **Save as type** field defaults to the export type you selected on the Create a New Export screen.

33. Click **Save**. The export processes, and you receive a message letting you know how many records were exported and the processing time.

34. Click **OK**. Because you marked the **Create control report** checkbox and selected **Preview** on the General tab, the New Export Control Report preview screen appears.
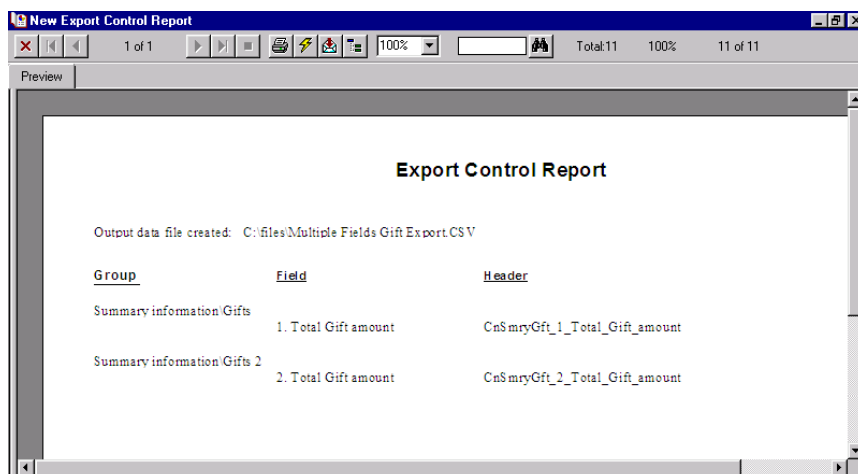
35. To print the Export Control Report, click **Print** on the toolbar.

36. To close the preview screen, click the red "X" on the left hand top corner of the screen. You return to the export record.

37. From the menu bar, select **File**, **Save As** to save the export record. The Save Export As screen appears.

38. In the **Export name** field, enter the export name you want. For example, you can enter "Gift Total Amount Field".

39. In the **Description** field, enter further details about the export record. For example, you can enter "Uses the same field multiple times with separate parameters".

40. The **Export type** field is disabled because you selected Constituent in the Create a New Export screen.

41. To authorize other users to run your export, mark the **Other users may run this export** checkbox.

42. To authorize other users to change your export, mark the **Other users may modify this export** checkbox.

43. Click **Save**. The export record is saved and appears in the list on the Export page.

44. From the menu bar, select **File**, **Close** to exit the export record.

▶ **Save an export record**

Note: You can save an export record before you export your data.

Once you select the criteria you want to use in your export, you can save it and use it again at a later time to extract any new records you enter in your database. This is especially helpful if you run the same type of export often and do not want to generate an export record each time you want to extract this information.

Note: We recommend you assign unique names and descriptions to your exports so you can find them easily when looking through a long list of export names on the Export page. We also recommend you begin the name of the export with your initials. This keeps all your exports together.

1. From the menu bar of the export record, select **File**, **Save As**. The Save Export As screen appears. For more about accessing the Export page, see "Navigate in Export" on page 132. For more about opening an export record, see "Open an export record" on page 134.
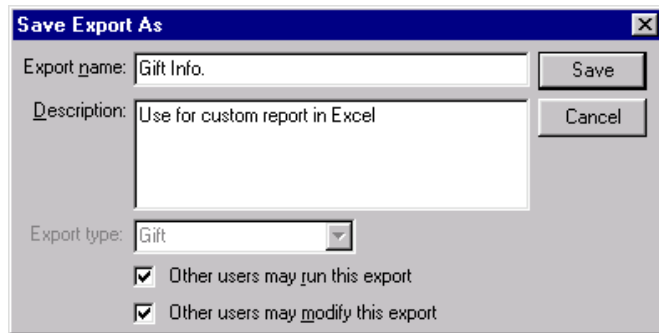
2. Enter the **Export name** and **Description** for your export record.

Warning: The **Export type** field is disabled and defaults to the export type you selected in the Create a New Export screen.

3. To authorize other users to run your export, mark the **Other users may run this export** checkbox.

4. To authorize other users to change your export, mark the **Other users may modify this export** checkbox.

5. Click **Save**.
6. From the menu bar, select **File**, **Close** to exit the export record. The export record appears in the list on the Export page.

Edit an Export

Once you create your export record, you can make changes and alter the results. You can add output fields to extract additional information and add or change formatting for certain export output fields.

▶ **Edit an export**

> *Scenario:* Your organization's Development Director decides he wants to send the Annual Campaign solicitation letter to constituents included in the Gift Info. export. He asks that in addition to each donor's total contributions for last year, you include a request for constituents to increase their donation by 10 percent for the upcoming year. This scenario uses the export record created in "Create a gift export" on page 164.

1. From the Gift Info. record screen, select the Output tab. For more about accessing the Export page, see "Navigate in Export" on page 132. For more about opening an export record, see "Open an export record" on page 134.
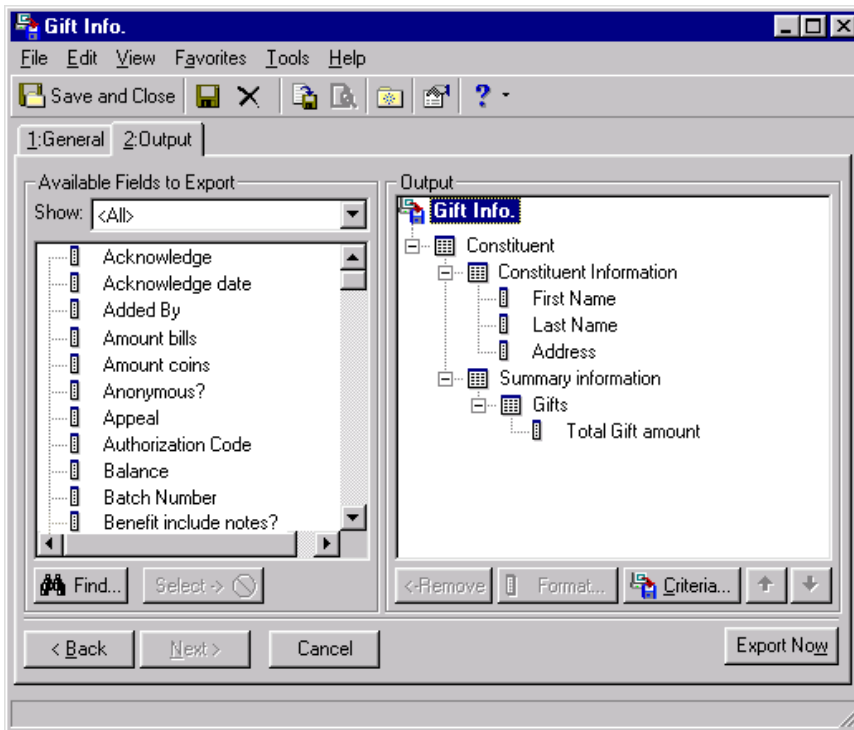
Tip: You can use **Find** for quick access to a field.

2. In the **Show** field, select a specific group of fields, or select "<All>" to see a complete list of Available Field categories.

3. Click the plus sign to the left of the group to reveal criteria fields under each group. The additional output fields for this example include **Org Name** from the Constituent, Constituent Information criteria group and **Total Gift amount** from the Constituent, Summary Information, Gift group.

4. Highlight **Org Name** and click **Select**. The selected output criteria field and its parent criteria group appear in the **Output** box.

Note: Because the Development Director wants to include last year's total gift amount, plus request an additional 10 percent increase in the solicitation letter, you must include the **Total Gift amount** field twice on the Output tab to export both amounts.

5. Highlight the **Total Gift amount** field in the **Available Fields to Export** box and click **Select**. The second instance of the **Total Gift amount** field appears in the **Output** box.
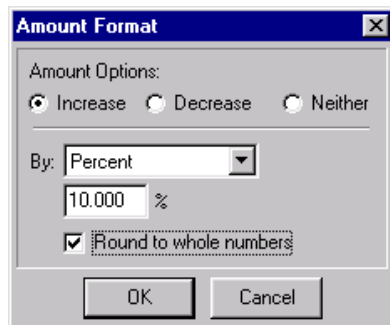
6. Highlight the second gift field that appears on the **Output** box and click **Format**. The Amount Format screen appears. The Gifts Criteria screen does not appear because the program knows you need the same filters selected for the first **Total Gift amount**.

7. In the **Amount Options** frame, mark **Increase**.
8. In the **By** field select "Percent" from the list and enter 10 in the field below.
9. Mark the **Round to whole numbers** checkbox to round your numbers to the nearest dollar.

10. Click **OK**. You return to the Output tab.
11. Click **Export Now** to run the export.
12. From the menu bar, select **File, Save As** because you want to keep the original export and create a new export record based on the edits you just made. The Save Export As screen appears.

13. In the **Export name** field, enter "Solicitation Letter for 2002".
14. In the **Description** field, enter "Request 10% increase for Annual Campaign".
15. To authorize other users to run your export, mark the **Other users may run this export** checkbox.

16. To authorize other users to change your export, mark the **Other users may modify this export** checkbox.
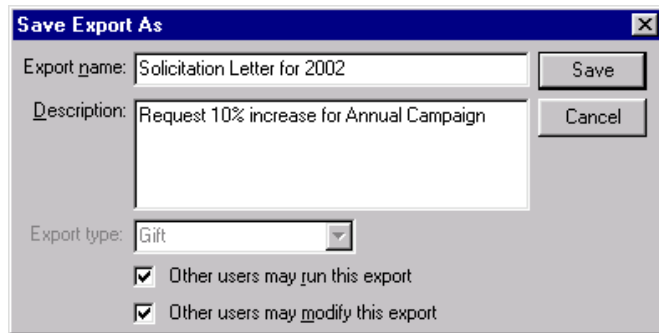
17. Click **Save**.
18. From the menu bar, select **File**, **Close** to exit the export record. The export record appears in the list on the Export page.

Preview the Export File Layout

Note: Previewing the export file layout is not an option for Relational Style exports.
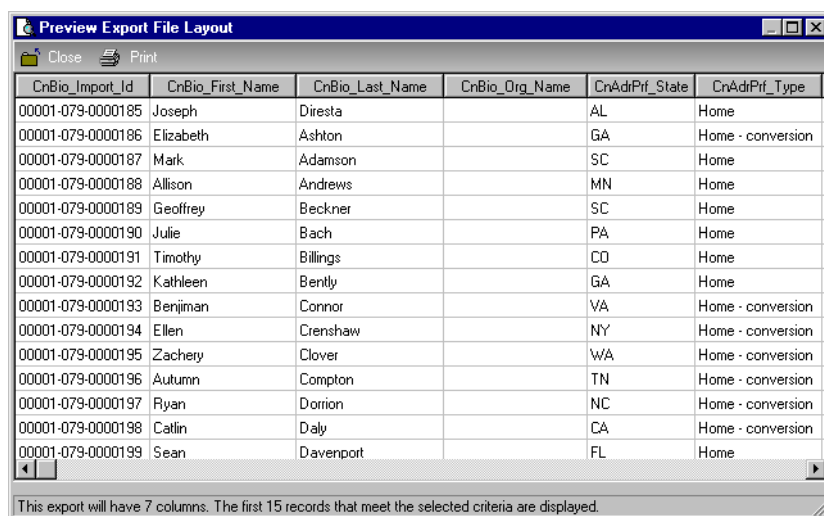
Previewing the export file layout allows you to review the information that appears in a Flat Style export. The file layout for an export usually displays the first 15 rows of exported information. The information is displayed in a grid and each row contains a different record type and each column displays information pertaining to that field. The Preview Export File Layout screen also displays the number of columns for the export.

▶ **Preview an export layout**

1. From the Export page, highlight the export for which you want to preview the export file layout. For more about accessing the Export page, see "Navigate in Export" on page 132.
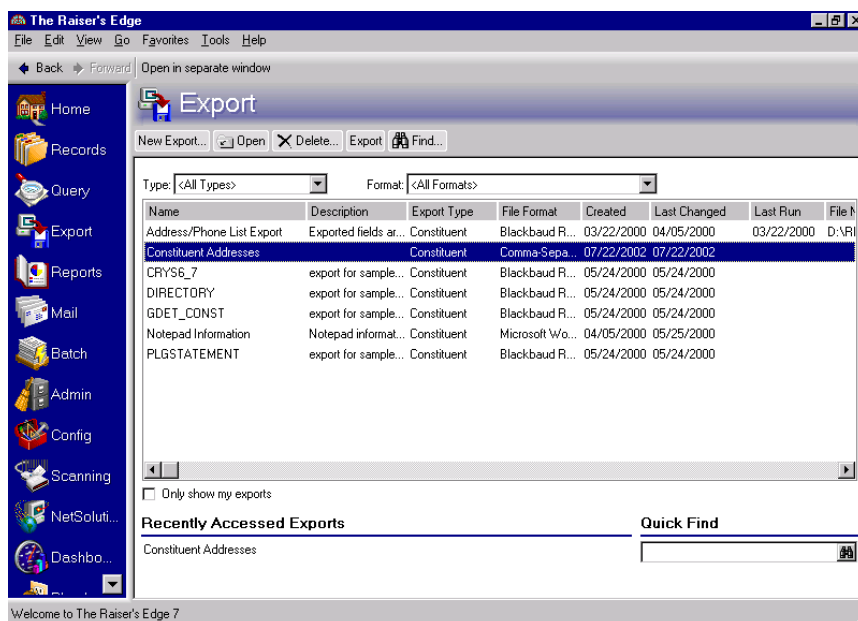
2. From the shell menu bar, select **File**, **Preview Export File Layout**. The export data is processed for previewing and the Preview Export File Layout screen appears.

3. On the action bar, click **Close** to return to the Export page.

Run an Export

Warning: If you use a mailing house, be aware that address lines are imported and exported with the /n between address lines instead of separate fields. For example, if your address is 123 Main Street Apt. 6, it would export and import as "123 Main Street/nApt. 6". If your mail house cannot accept this format or the mail house cannot return the file in this format, you must separate the addresses before you send the export file.

▶ **Run an export**

You can run an export directly from the Export page if you want to update the export to include new data entered in your database. Use this procedure to execute an export without opening it. Before you select this procedure, you must have assigned output fields to the export record.

1. From the Export page, highlight the export you want to run. For more about accessing the Export page, see "Navigate in Export" on page 132.

2. From the shell menu bar, select **File**, **Export**.
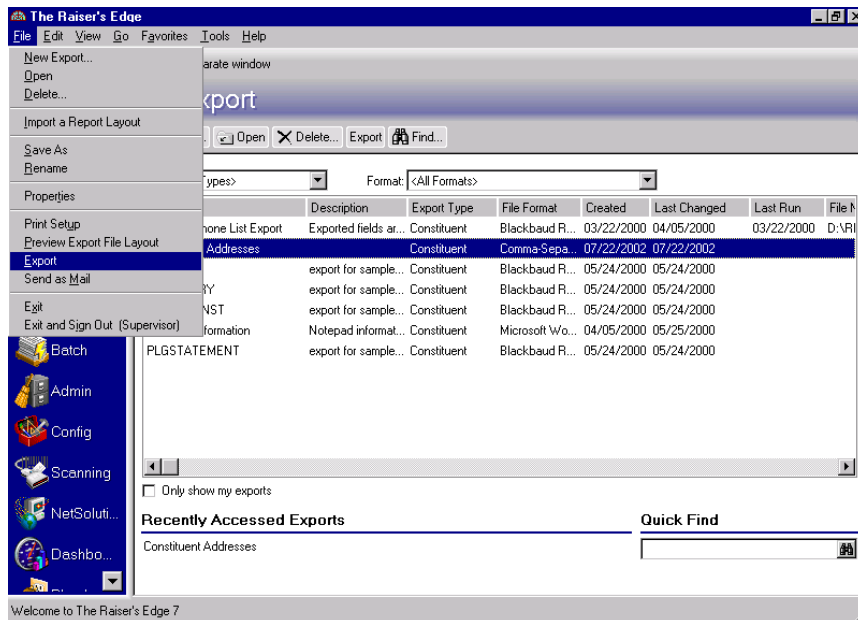
The Export file name screen appears.
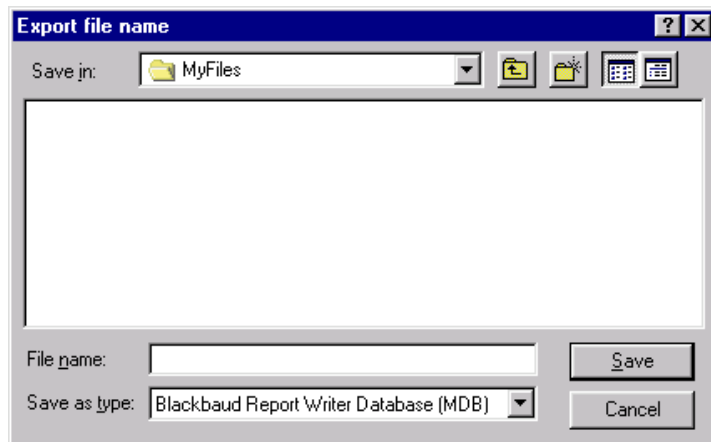
3. In the **Save in** field, assign a location to your data file For example, you may want to save this to C:\MyFiles, or another folder you prefer to store information.

4. In the **File name** field, enter "ConsAddress.mdb" to name the data file for the export.

5. The value in the **Save as type** field defaults to the export type you selected in the Create a New Export screen.
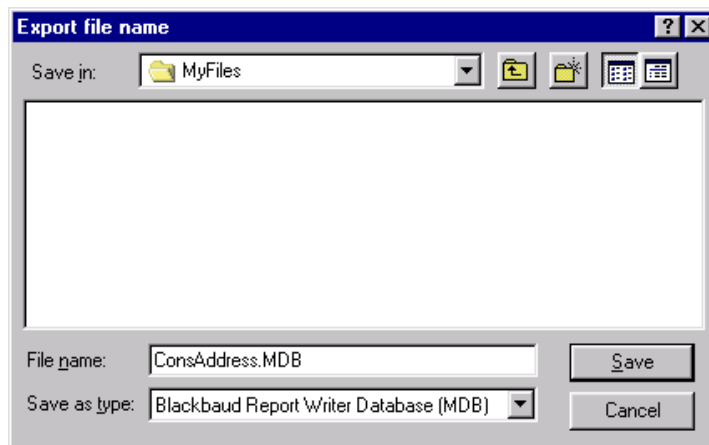
Note: When you click **Save** on the Export file name screen, the data file you save contains information exported from your database. Search for this file name to use the data file in another software application.

6. Click **Save**.

7. Once the export completes processing, you receive a confirmation message.

8. Click **OK**. You can use the data file in your other software application.

Delete Export Records

In *The Raiser's Edge*, you can delete individual export records. When you delete an export record, you are deleting only the record containing your output field selections and any formatting options assigned to them. Once you delete an export, you can still use the file containing all the data extracted from your database in the other software application. We suggest you print a control report of any export you decide to delete. The control report lists the export criteria.

▶ **Delete an export record**

Warning: We recommend you back up your database before deleting any queries. Deleted queries can be restored only from a backup of your system.

1. From the Export page, highlight the export you want to delete. For more about accessing the Export page, see "Navigate in Export" on page 132.
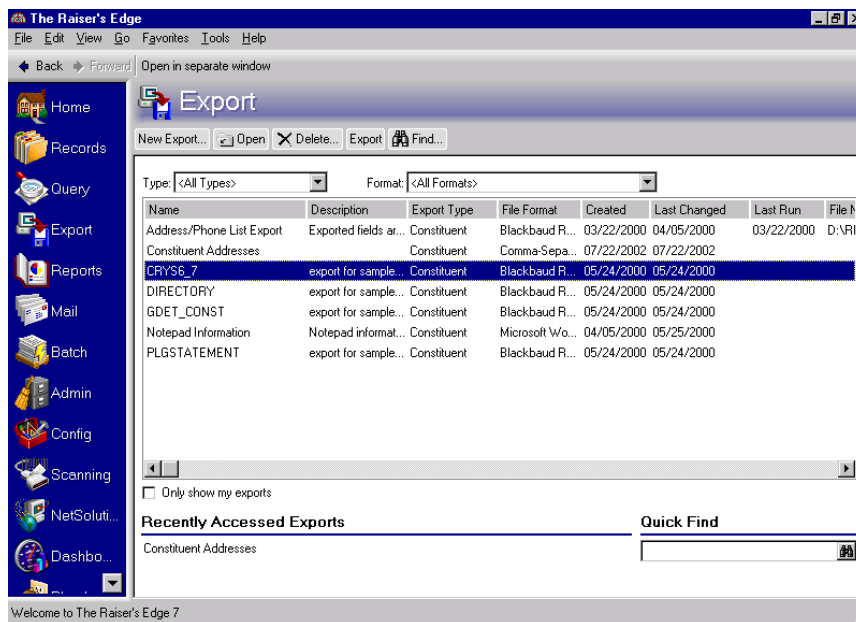
2. On the action bar, click **Delete**. A warning message appears.
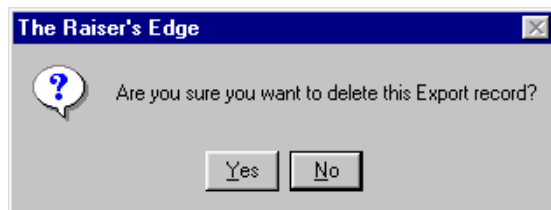
3. Click **Yes** to delete the export and return to the Export page.

Send an Export Data File as Email

Warning: If your data file is very large, you may have to compress the file before you email it. Even after compression some data files may still be too large to email.

With *The Raiser's Edge*, you can share information you stored in your database with other users. You can send export data files as electronic mail to another user for further analysis or to use in other functions. Sending an export data file via email can be particularly useful for situations in which users need to manipulate the data from your database but do not need to access or edit the export record.

▶ **Send an export data file as email**

Tip: To email an export record from the Export page, highlight the export you want to email on the Export page, and select **File**, **Send as Mail** from the shell menu bar.

1. From the export record screen, from the menu bar, select **File, Send as Mail**. For more information about accessing the Export page, see "Navigate in Export" on page 132. For more information about creating an export record, see "Create a constituent export" on page 156.
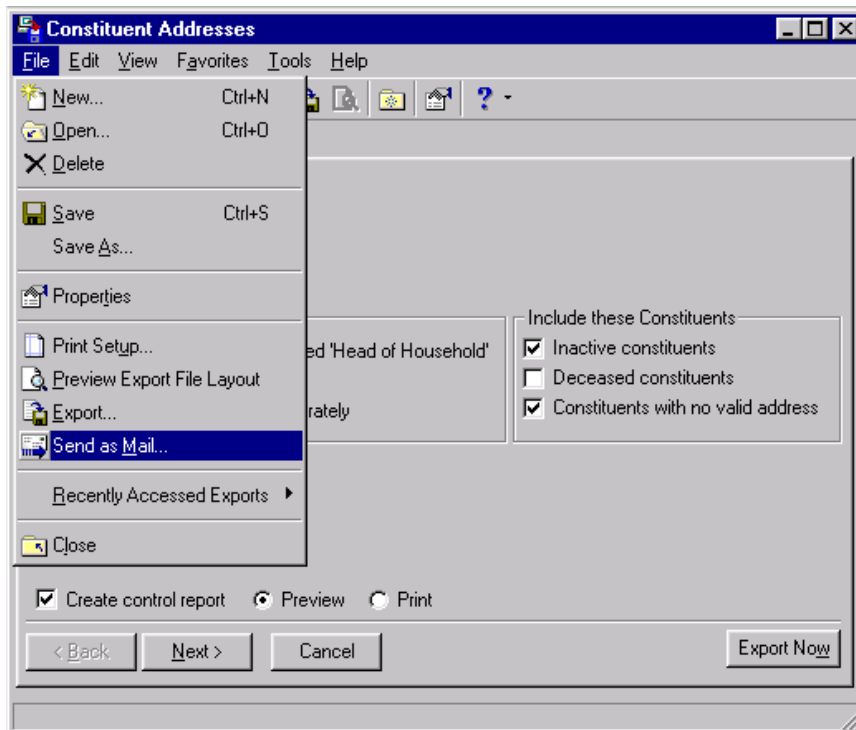
The Export file name screen appears.
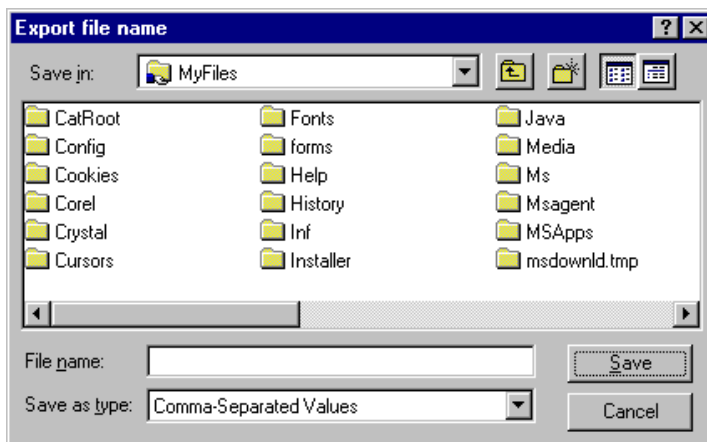
2. In the **Save in** field, assign a location to your data file. For example, you may want to save this to C:\MyFiles, or another folder you prefer to store information in.

3. In the **File name** field, enter "ConstituentAddress4email.csv" to name the data file for the export.

4. The value in the **Save as type** field defaults to the export type you selected on the Create a New Export screen.
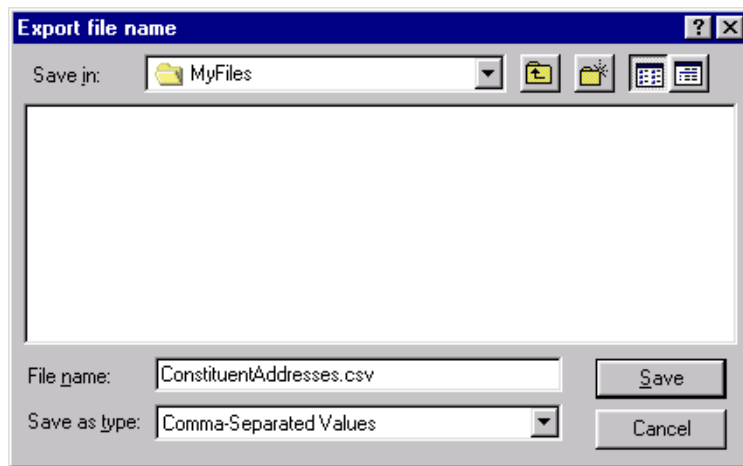
Note: When you click **Save** on the Export file name screen, the data file you are saving contains information exported from your database. Search for this file name to use the data file in another software application.

5. Click **Save**. The export processes.

6. The email message screen appears with the export data file in the data format specified as an attachment.
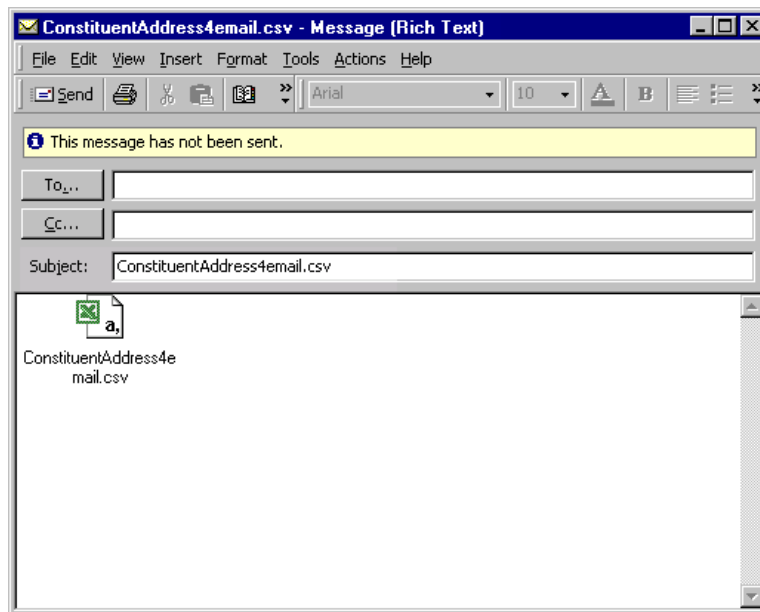
7. Enter the email information that applies to the recipient and click **Send**.

8. To close the export record, click **Save and Close** on the toolbar.

Customize Export and Using Favorites

The Raiser's Edge provides some time-saving options to create, find, open, or perform other functions with your exports. For example, you can create shortcuts for easy access to the exports you use most frequently. This is especially helpful if you use this function extensively or if you run the same export repeatedly based on a specific schedule. You can further customize *Export* by making some decisions affecting the export record screens. You can establish default export format and type, depending on the selections you use most often. User Options provide another option for customizing the export record screen. For more information about User Options, see "Export User Options" on page 137. These options simplify the process and help you save time.

▶ **Add an export to the list of favorites**

> **Note**: For more information about **Favorites** on the Home page, see the *Program Basics Guide*.

If you create export templates or have exports you use constantly, add them to a list of favorites. Adding frequently used exports to your list of favorites provides easy access to them, especially if the list displayed in the Export page is extensive. Once you compile your list of favorite exports, you can run an export without opening it, right from the **Favorites** shell menu or the Home page.

> **Note**: We recommend creating a list of export favorites. This is a list of the exports you use most often.

1. From the Export page, highlight the export you want to add to your list of favorites. For more information about accessing the Export page, see "Navigate in Export" on page 132. For more about creating an export record, see "Create a constituent export" on page 156.
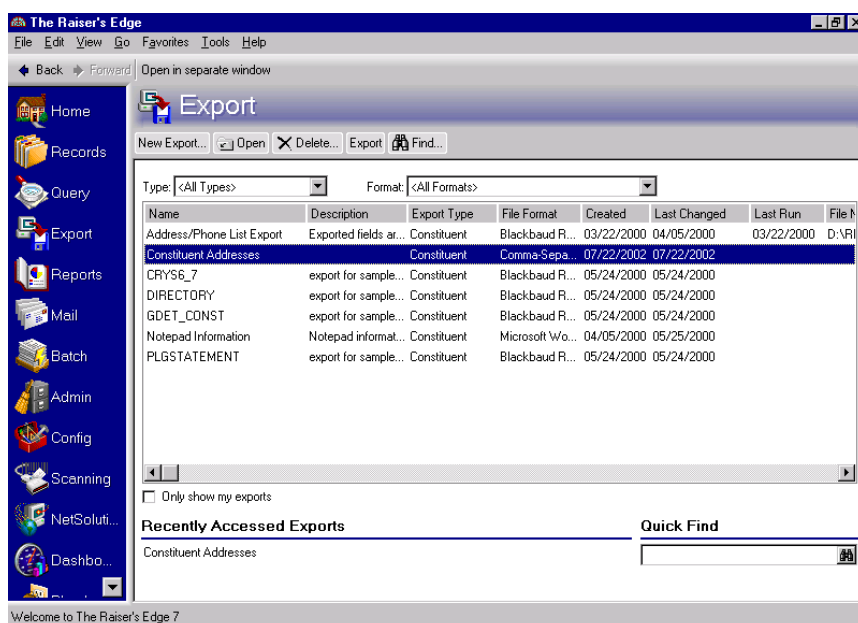
2. From the shell menu bar, select **Favorites**, **Add Favorites**. The New Favorite screen appears.

3. Leave the default information in the **Name** and **Description** fields.

Note: The Default Action field is disabled because you can only open export records from the Home page. The **Use The Raiser's Edge to open this item** checkbox only enables if you are adding an external document to the Home page.

4. In the **Default Action** field, select if you want to run, open, export, or send the query as email from the Home page.

   Once the task is added to Favorites, you can also right-click the task to select these options from a menu that appears.

5. In the **Create in** field, leave the default "Favorites" folder selected. This way, you can open the export record by clicking the link for it directly from Favorites on the Home page.

6. Click **OK**. The export is added to the favorites list on the Home page.
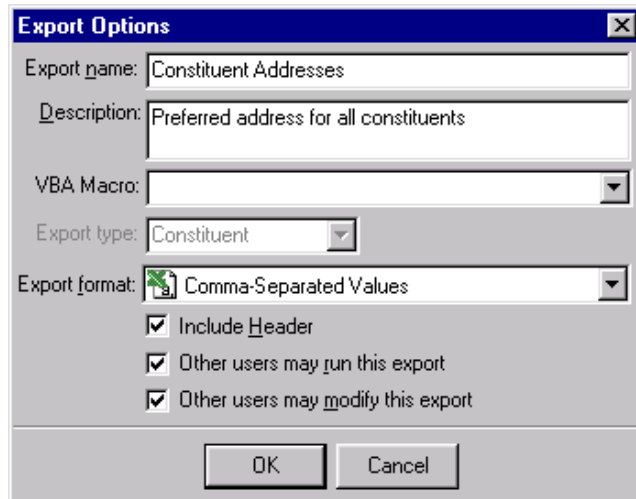
Export Properties and Options

Properties are the overall characteristics of the export. These settings include general characteristics such as the description, type, format, information about the records to include, and access and edit rights information. Export properties also include information about the output fields you select.

Export options summarize basic information about the export. You can make changes to your export options. For example, after you create and save an export, you may need to change the export's name or description. The Export Options screen allows you to edit the information in these fields. Export Options are password-specific, which means you can access them from any computer as long as you log in using your password.

▸ **Add or change export options**

1. From the Constituent Addresses export record screen, select **Tools**, **Export Options** from the menu bar. For more about accessing the Export page, see "Navigate in Export" on page 132. For more about opening an export record, see "Open an export record" on page 134.
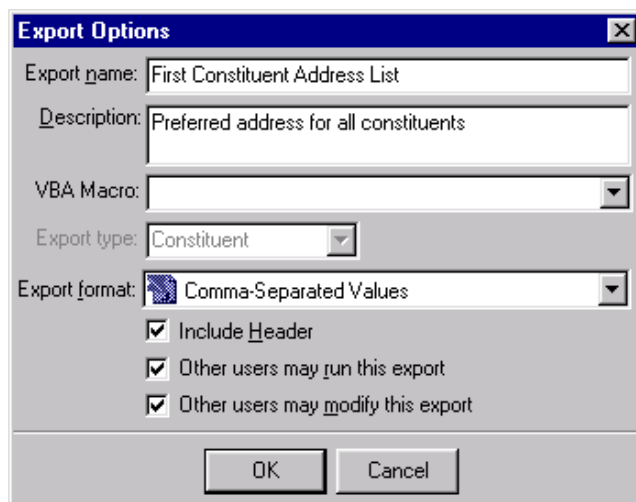
Note: The information in these fields default to the original values assigned when the export record was first saved.

2. In the **Export name** field, enter "First Constituent Address List" to change the export record name.

3. For the remainder of the fields on the Export Options screen, leave the default information. For more information about these fields, see "Save an export record" on page 192.

4. Click **OK**. You return to the export record screen. Notice the title change to First Constituent Address List in the title bar.
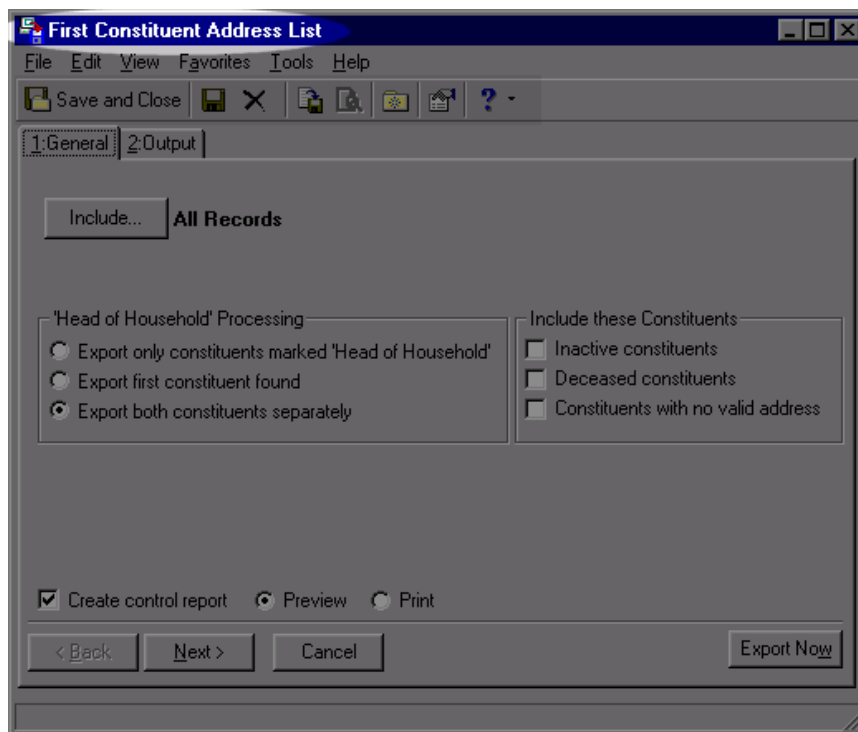
5. To return to the Export page, click **Save and Close** on the toolbar.

▶ **View an export properties**

1. From an export record screen menu bar, select **File**, **Properties**. The Export Properties screen appears. For more information about accessing the Export page, see "Navigate in Export" on page 132. For more information about creating an export record, see "Create a constituent export" on page 156.
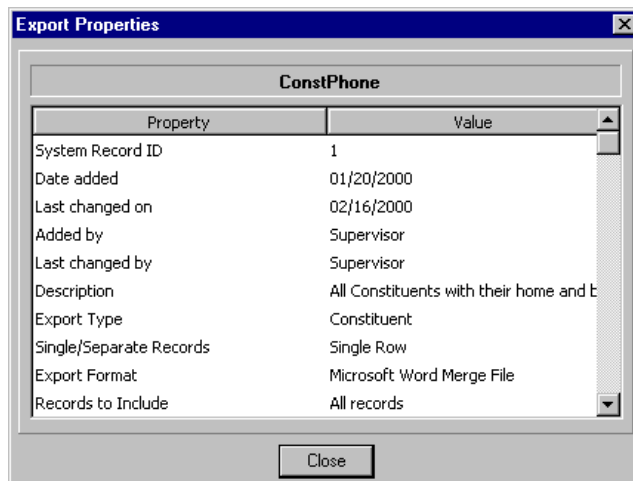
You can view general information about the export, including the export type, format, description, date the export was run, and date the export was last modified.

2. Click **Close** to close the screen. You return to the export record.

3. To close the export record, click **Save and Close** on the toolbar.

Organize Export Categories

Note: The export record, which is the record containing all the output and formatting choices for your export, can be customized, saved, or reused in the future.

To help manage and organize the export records you create, you can create categories in which to group them, such as by user or by the export's intended use. To create and organize export categories, select **Organize Categories** from the menu bar of the Export page. On the Organize Categories screen, you can create, rename, and delete export categories. You can also adjust the order in which they appear on the Export page.

Categories that appear on the Export page are not specific to individual users. By default, the General category appears. You cannot rename or delete this category.

Note: When you save an export, you can add it to an existing category or create a new category.

▸ **Create export categories**

1. From the Export page, on the menu bar, select **Organize Categories**. The Organize Categories screen appears.
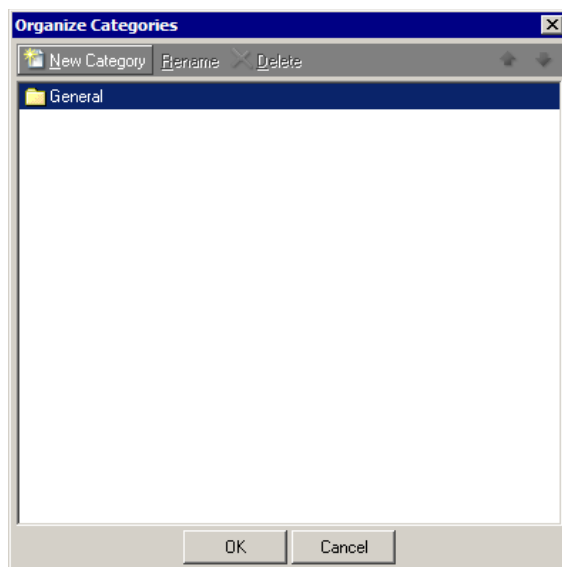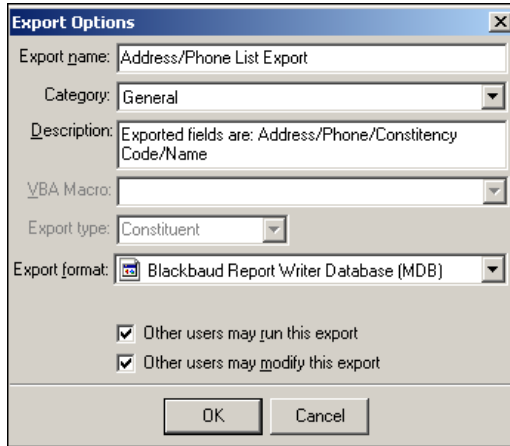
2. To create a new export category, click **New Category**. The New Category screen appears.
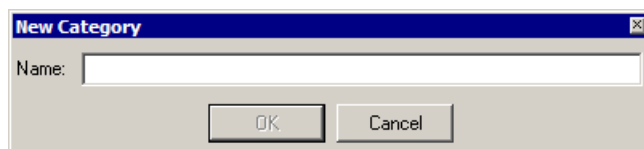
3. In the **Name** field, enter a name for the new export category.

4. Click **OK**. You return to the Organize Categories screen.

5. Click **OK**. You return to the Export page. In the box on the left, the new category appears.

6. To add an existing export to the new category:

    a. In the export grid, select the export to add to the category.

    b. Right-click and select **Change Category**.

The Export Options screen appears.

c. In the **Category** field, select the new category.

d. Click **OK**. You return to the Export page.

Index

sub 92
summary information fields, *Query* 80

T

text (TXT) 142
tips when using *Query* 5
toolbar
 Export 137
 Query 12
types
 Export 139
 Query 20

U

unfreeze columns 100
updating, *see refreshing*
user options
 Export 137
 Query 13

V

vertical gridlines 101
view group 48

W

wildcards 26
WordPerfect merge file (DAT) 142

X

xor 91