

# PARISH IQ (Intelligent Query) USER GUIDE



**ParishSOFT®**  
*Church Management Software and Web Solutions*

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*Parish IQ User Guide*

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for use with

ParishSOFT Applications for Parishes

Version 3.6.2x and later



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## *CHAPTER 1*

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# *BUILD & SAVE QUERIES*

## Introduction

Ask a question, get an answer. Parish IQ (Intelligent Query) provides a simple way to build queries from your ParishSOFT family, member, and contributions data. Just choose the fields you need, select any conditions, tell the system how to sort, and execute the query. Parish IQ returns only the data you need. Print a list of the results, merge to Word, or export data to Excel or XML and use it any way you see fit...in any application that accepts these formats.

You can save any Parish IQ query and use it again and again. Each time you run the saved query, it updates with the most current data from your ParishSOFT software. Queries can be designated global, to make them available to other authorized users, or kept confidential so that only you see the results.

Parish IQ can also create static family workgroups that you can use to send highly-targeted communications to your families.

Parish IQ gives you precise, creative ways to analyze data on your families, members, and contributions. The number of queries you can run is practically unlimited, but here are a few examples of questions asked and answered in some of parish customers' offices using Parish IQ:

*“Of our families with children in Religious Ed, which adults are not volunteering in parish ministries?”*

*“What is the average age of the registered adults in our parish; and what are my age demographics by ranges of 26–45, 46–65, and 66 and older?”*

*“How many families registered within the last 2 years; and how many registered between 3–5 years ago?”*

*“Which families made an offertory pledge last year but not this year?”*

*“Which of our older teens ages 15–19 have been baptized but not confirmed?”*

*View a list of all families who are contributing via Electronic Giving. Compare their average pledge contributions with families who pay by non-electronic methods.*

Whatever your question about families, members, and contributions, you can get the answers you want in just seconds.

## About This Manual

This guide uses simple examples to illustrate how to create and save a query, how to open a saved query, and how to export your query data to another format for use in other applications.

The examples shown in this document use demonstration data and do not represent the actual records of any parish or diocese.

## Log In

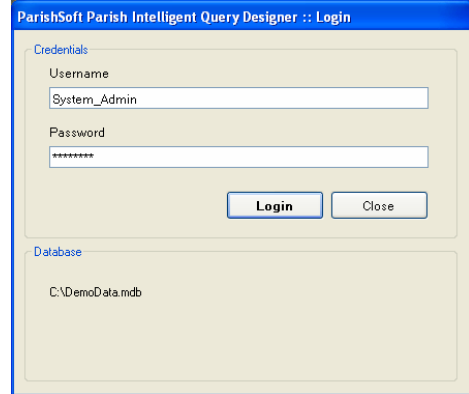
Parish IQ (Intelligent Query) is a desktop application that connects to a web service, making your ParishSOFT data available from your usual login.

To log in:

1. Double-click the **Parish IQ** icon on your desktop.

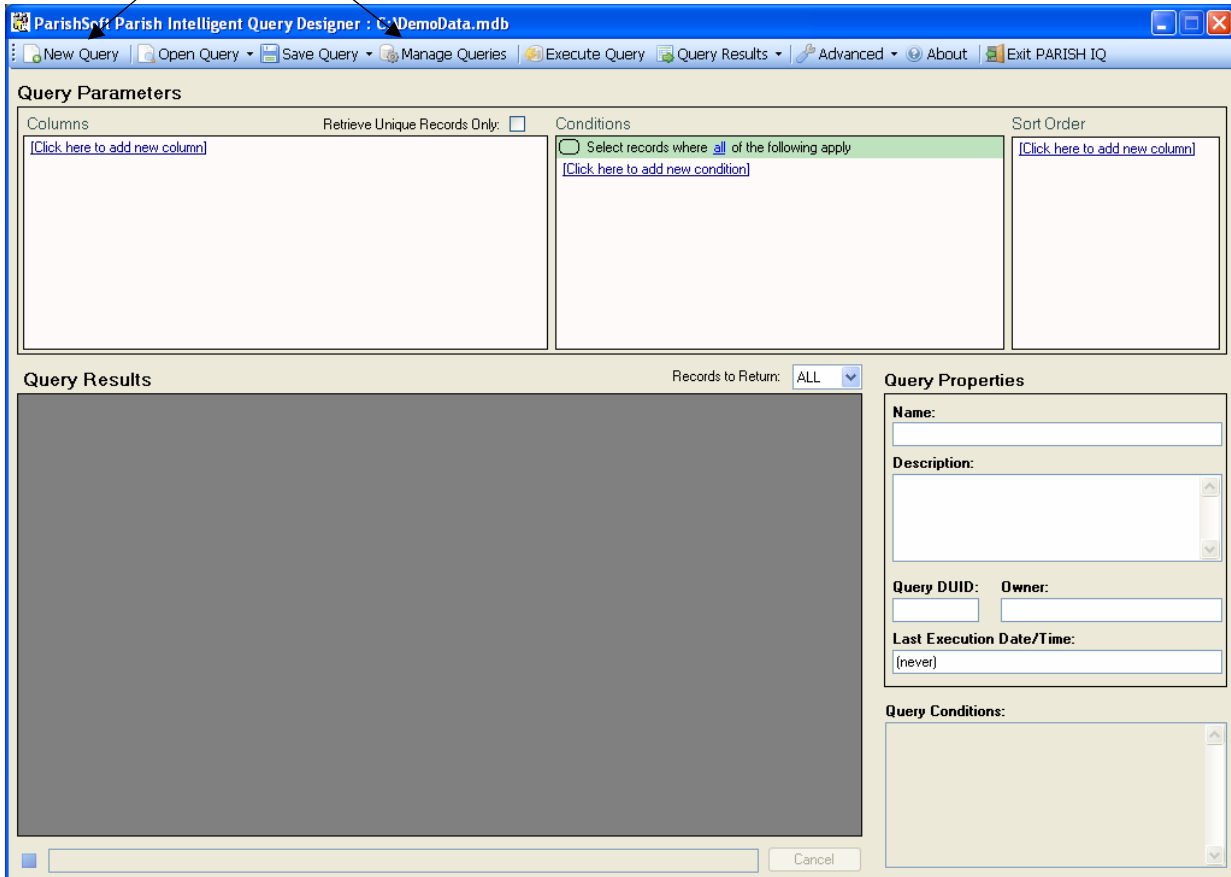


2. Enter the **Username** and **Password** that you use to access your other ParishSOFT applications and click **Login**.



3. The main Parish IQ Query Designer window will open. Use the controls provided in the toolbar at the top of the screen to use the query builder as desired. (See page 8 to Create a New Query.)

### Toolbar Controls



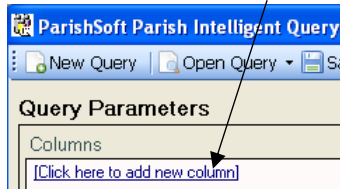
## Create a New Query

Parish IQ lets you build a query by choosing one field at a time. Each field results in a column in your query results.

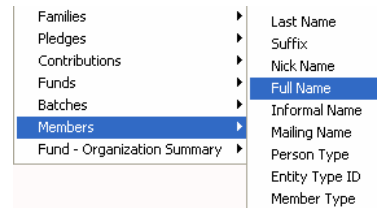
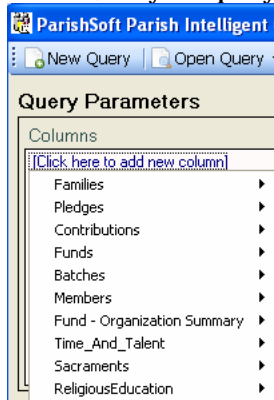
Fields are grouped into the following categories: Families, Pledges, Contributions, Funds, Batches, Members, and Fund – Organization Summary, Time\_And\_Talent, Sacraments, Religious Education, view\_QB\_Pledges\_2008 (Quick Batch Pledges), and view\_QB\_Pledges\_2007.

Complete the following steps to create a new query using Parish IQ. In this example, we will find female members between the ages of 18–45.

1. Click on the link [\[Click here to add new column\]](#).




2. Browse through the menu of categories, subcategories and fields; and click to choose the first field, or column, for your query.

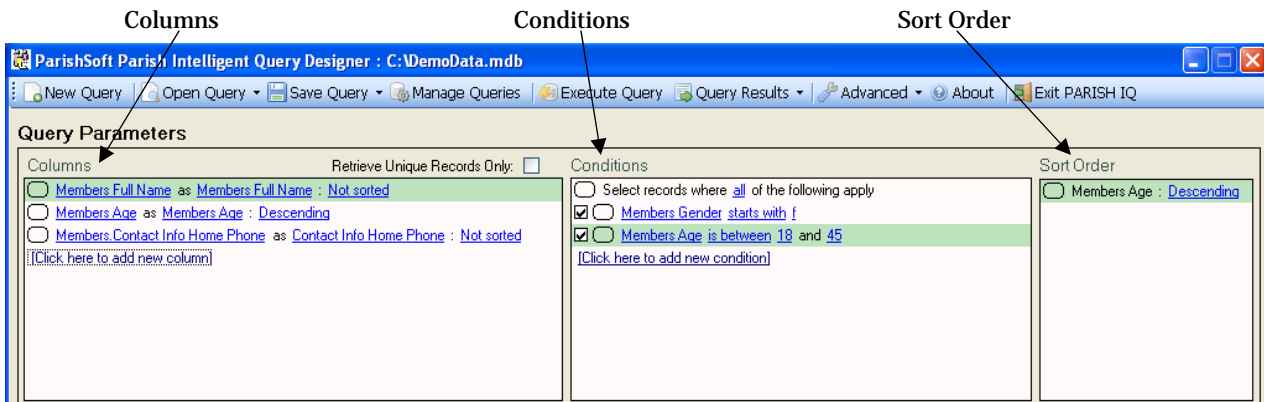


3. If you would like to sort your query on this field, click on the link [Not sorted](#) and choose either Ascending or Descending.
4. To add another field, click on the link [\[Click here to add new column\]](#) and select the field you need. Repeat adding columns and specifying sorting options until you have all of the query parameters (i.e., fields) that you would like in your query.
5. To set any conditions for your query, click the [\[Click here to add new condition\]](#) link. Choose your field and specify your condition statement. In the example shown on the following page, we have two conditions: [Member Gender Starts with F](#) and [Member Age is between 18 and 45](#). Condition statement options can include:

starts with
contains
is equal to
does not start with
does not contain
is not equal to
is null
is not null

6. To save your query, click the  button, type a unique name, and click **Save Query**.

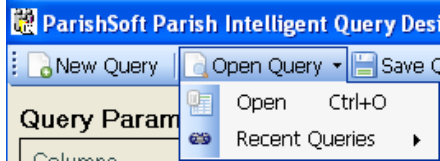
The columns (fields), conditions, and sorting criteria, that you have selected for your query will display in the three Query Parameters windows (shown below). You can remove or change these parameters—see *Edit Query Parameters* on page 11 for details.



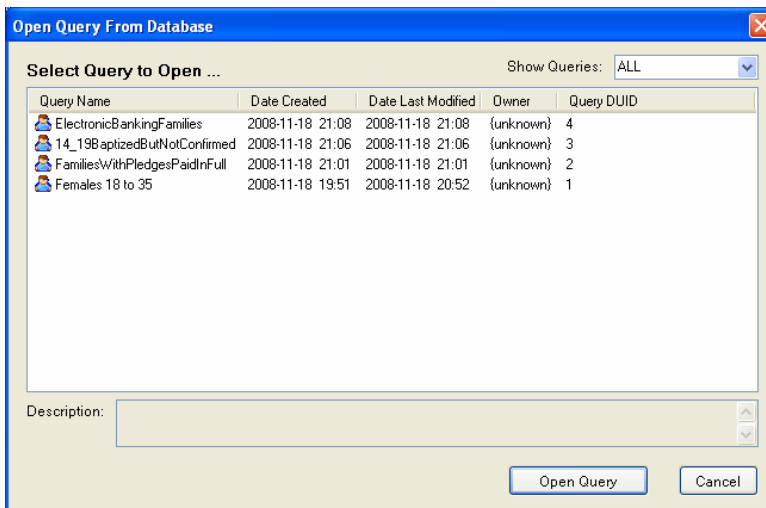
## Open a Saved Query

You can open queries that you have saved, as well as any queries that other users have saved and designated as 'Global.'

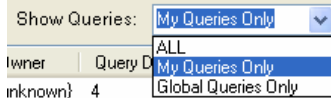
1. Click the **Open Query** button and select **Open** (or use the shortcut keys <Ctrl + O>).



2. Click to select the query you need and click the **Open Query** button.



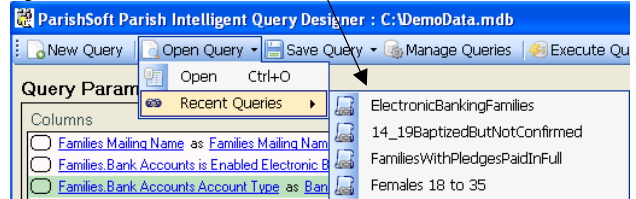
By default, ALL queries, both global and private, will display in the window any time you open a query. To filter this view to show just your private queries or just your global queries, click the **Show Queries** lookup table and choose the desired option.



## Open Recent Queries

The **Open Query** menu has a **Recent Queries** option that will display any queries that you have opened in your current login session. This list will be cleared when you log out of Parish IQ.

To open a recent query, click the desired option from the list.



## Manage Queries

You can also open queries from the *Manage Queries* screen. See page 27 for details.

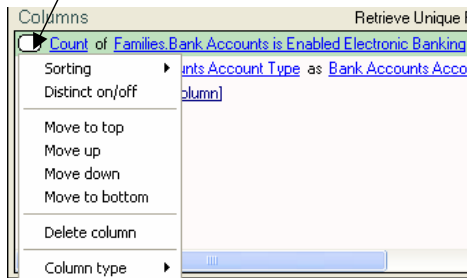
## Edit Query Parameters

Once you set the parameters for your query, you can move, change, or delete those parameters using the Parish IQ edit functions—available from any link, checkbox, or box . The edit options available from the boxes  will vary depending upon which one you select.

### Edit Columns

To change a column, click the first link in the **Columns** row  **Members Full Name** as **Full Name** : **Not sorted** and choose a new category and field.

To change the order of your columns, click the box in the row you wish to move



and click either **Move to top**, **Move up**, **Move down** or **Move to bottom**.

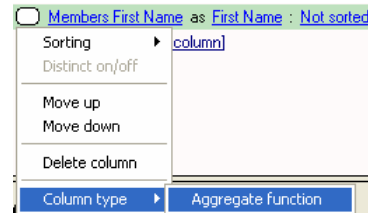
To remove a column, click the box in the applicable row and click **Delete column**.

### Aggregate or Simple Column Types

You can use Parish IQ’s aggregate function to get a sum of any of the columns in your query. To apply the aggregate function to a column, complete the following steps.

1. Click the box  for the data element (i.e., column) you wish to aggregate.

2. Choose **Column type** > **Aggregate function**.



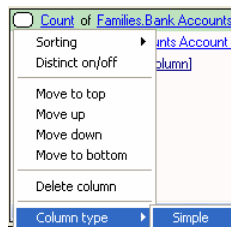
For example, if you wish to know how many members each pledging families has, you would add a member-related data element, like *Member First Name* or *Member Full Name*, to your query; set the column type to **Aggregate function**, and execute the query. Your member count would then display in your query results.

**Query Results**

	Last Name	Family DUID	Total Pledge Amount	First Name Count
<input checked="" type="checkbox"/>	Fox	4818	650	2
<input type="checkbox"/>	Aaron/Maushard Family	85770	5000	4
<input type="checkbox"/>	Abbeglenner	6888	3000	5
<input type="checkbox"/>	Abbeyers	6889	100	3
<input type="checkbox"/>	Abbottler	6890	1000	4
<input type="checkbox"/>	Abeders	1	2000	6
<input type="checkbox"/>	Abrams	1424	900	1
<input type="checkbox"/>	Ackermanski	2267	1500	2

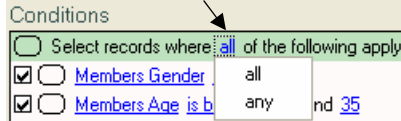
Notice that **Aggregate** column types are identified in your query parameters by the term **Count**. In this example, Parish IQ changed our “**Members First Name**” column title to “**Count of Members First Name**” when the aggregate was applied.

To remove the aggregate function, click the column’s box , and select **Column type** > **Simple**.



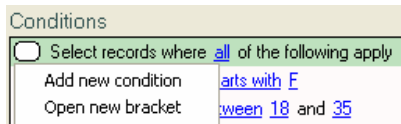
## Edit Conditions

Conditions are *If A, then B* statements that you apply to your data for statistical analysis. You can apply one or several conditions to your data using Parish IQ. Conditions default to the status of **'all apply'**. You can change this setting to **any** by clicking the **all** link and selecting **any**.



You can ignore a condition within your query by unchecking the box in the applicable row.

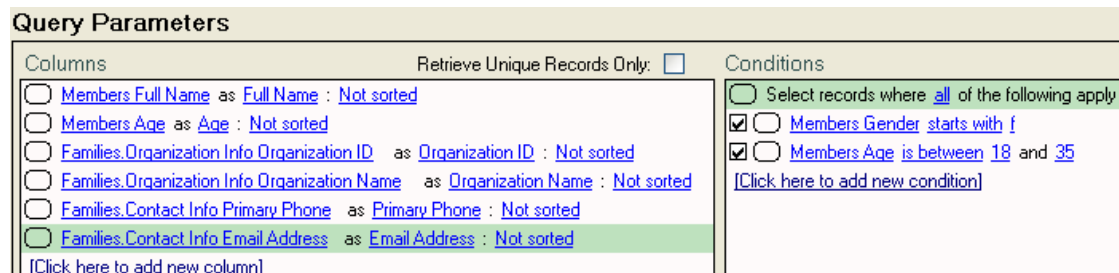
To add a new condition bracket, click the box  in the applicable row and choose **Open new bracket**. Use brackets to query your database using a combination of **any** and **all** statements.



To delete a condition, click the box  in the applicable row and choose **Delete current row**.

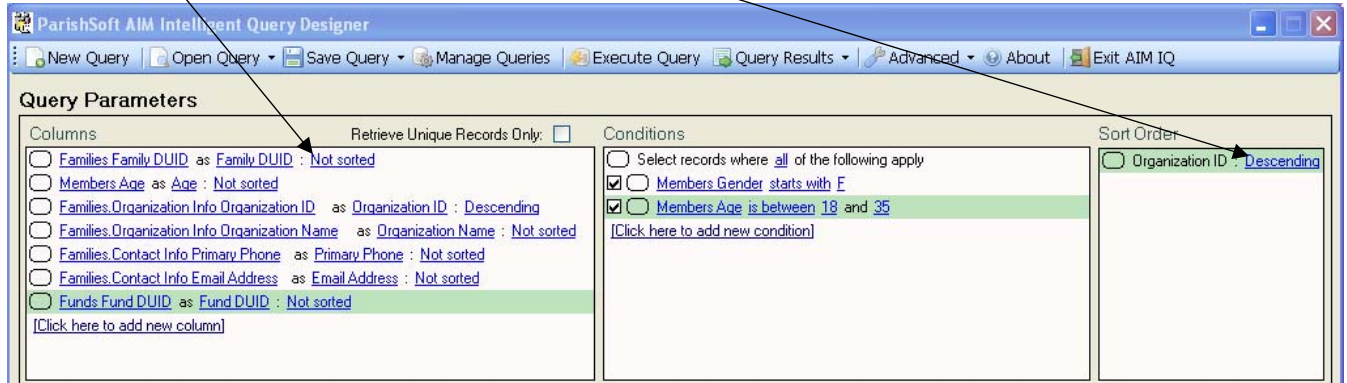


To edit the value of a condition, click the applicable link, edit the value, and click off the field.



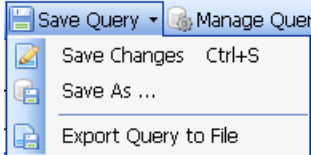
## Edit Sort Order

To change the way a particular column is sorted, click the applicable sort link in either the **Columns** window or in the **Sort Order** window.



## Save a Query

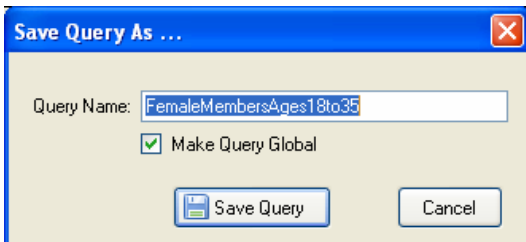
Your Save Query menu offers the options **Save Changes**, **Save As**, and **Export Query to File** (see pages 18, 19 for more information on the export process).



**Save Changes** (or the shortcut <Ctrl + S> overwrites an existing query file. **Save As** lets you create a new query file with a new file name.

## Global or Private Designation


By default, Parish IQ saves all queries so that they are available only to your user login. If you wish to share a query with other authorized users, you can designate a query as '**Global**' by checking the **Make Query Global** box.



You can share your queries with Parish IQ users in other parishes without giving them access to your data using the *Export Query to File* function. This export also lets you share a query with another user in your own office without making the query global for all users. See page 18 for more information.

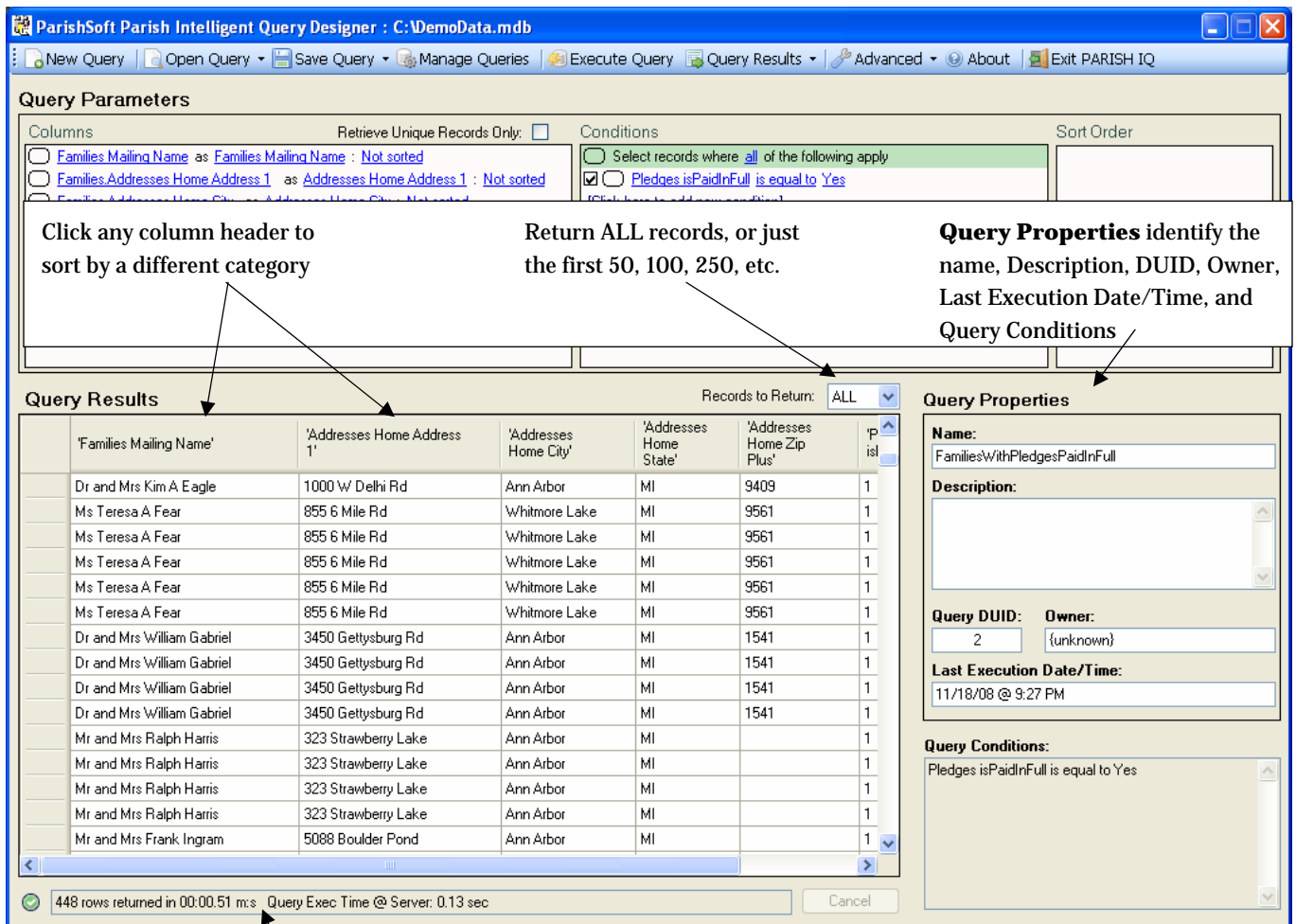
# Execute a Query

Once you have selected query parameters, click the **Execute Query** button

 **Execute Query** to run the query and view your results.

You can Edit Query Parameters (see page 11) to refine your query as needed.

Once you have the results you need, use the **Query Results** menu to export to Excel (see page 19), merge to Word (see page 20), generate an email address list (using workgroups, see page 24), print results (see page 23), or create a family workgroup (see page 24).



The screenshot shows the ParishSoft Parish Intelligent Query Designer interface. The top menu bar includes options like 'New Query', 'Open Query', 'Save Query', 'Manage Queries', 'Execute Query', 'Query Results', 'Advanced', 'About', and 'Exit PARISH IQ'. The main window is divided into three sections:

- Query Parameters:** This section allows users to define columns and conditions. It includes a 'Columns' section with radio buttons for selecting columns (e.g., 'Families Mailing Name as Families Mailing Name : Not sorted'), a 'Conditions' section with a 'Select records where all of the following apply' checkbox and a specific condition 'Pledges isPaidInFull is equal to Yes', and a 'Sort Order' section.
- Query Results:** This section displays the results of the query in a table. The table has columns for 'Families Mailing Name', 'Addresses Home Address 1', 'Addresses Home City', 'Addresses Home State', 'Addresses Home Zip Plus', and 'Pledges isPaidInFull'. The 'Records to Return' dropdown is set to 'ALL'. The status bar at the bottom indicates '448 rows returned in 00:00.51 m:s Query Exec Time @ Server: 0.13 sec'.
- Query Properties:** This panel on the right provides details about the query, including 'Name: FamiliesWithPledgesPaidInFull', 'Description', 'Query DUID: 2', 'Owner: {unknown}', and 'Last Execution Date/Time: 11/18/08 @ 9:27 PM'. It also shows the 'Query Conditions' as 'Pledges isPaidInFull is equal to Yes'.

Annotations with arrows point to specific elements: 'Click any column header to sort by a different category' points to the 'Families Mailing Name' header; 'Return ALL records, or just the first 50, 100, 250, etc.' points to the 'Records to Return' dropdown; and 'Query Properties identify the name, Description, DUID, Owner, Last Execution Date/Time, and Query Conditions' points to the 'Query Properties' panel.

Parish IQ identifies the number of rows in your query and the processing time

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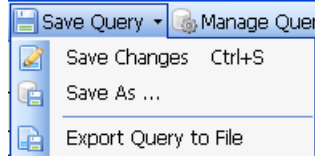
## *CHAPTER 2*

# *USE QUERY DATA WITH OTHER APPLICATIONS*

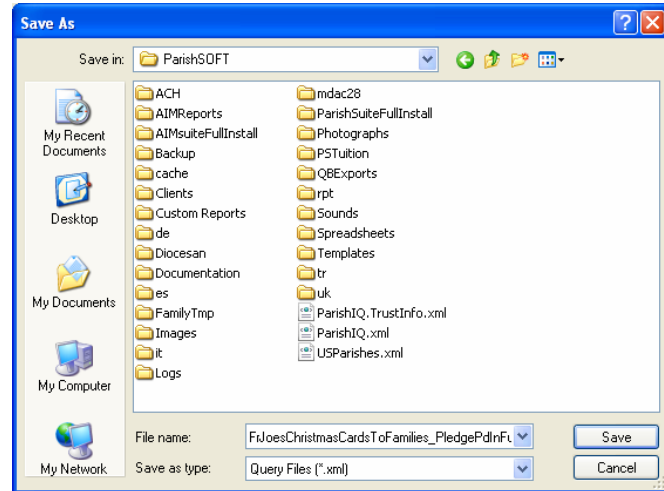
## Export Query to File

You can export any executed query to an .xml file using the following procedure.

1. Execute your query.
2. Click the **Save Query** menu > **Export Query to File**.



3. Choose your file path and specify a **File Name**.
4. Click the **Save** button.



XML query files can be transferred from one Parish IQ desktop to another, allowing you to share query files and do collaborative data analysis with specific users without making your queries global for all users in your system.

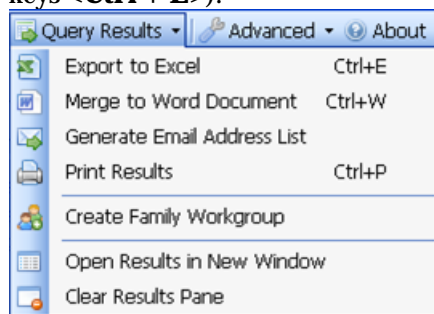
In addition, you can share XML query files with other individuals who may not have access to your Parish IQ global queries, for example, you might share an exported query file with a colleague from another parish—it's a great way to share best practices while still protecting the security of your data.

The **Manage Queries** menu lets you export any query to an .xml file—you do not need to execute the query prior to exporting when you use this method. Please see page 26 for instructions.

## Export Query to Excel

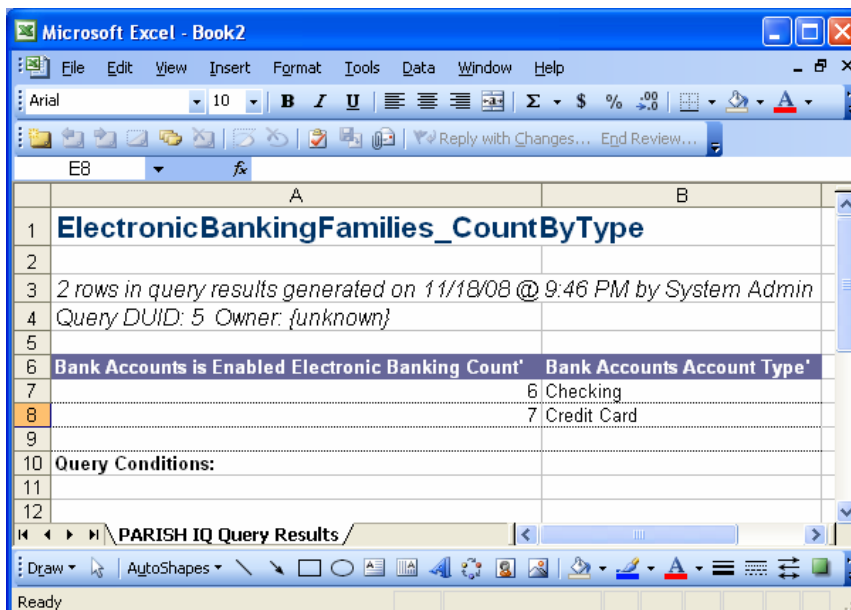
You can export any executed query to Microsoft Excel, where you can manipulate your data freely, export it to one of the many formats that Excel offers, and then import the records into any other application.

1. Execute your query.
2. Click the **Query Results** menu > **Export to Excel** (or use the shortcut keys <Ctrl + E>).



3. Follow the prompts to complete the export.

Parish IQ creates a spreadsheet containing your query data and column names, title and summary of the query results, and any query conditions that you applied to get the data.

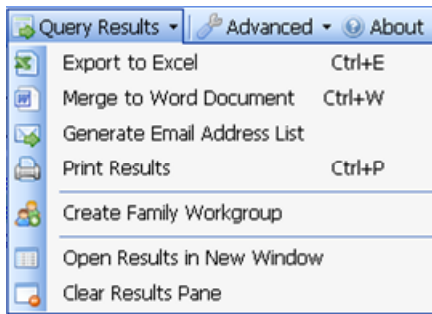


# Merge Query to Word

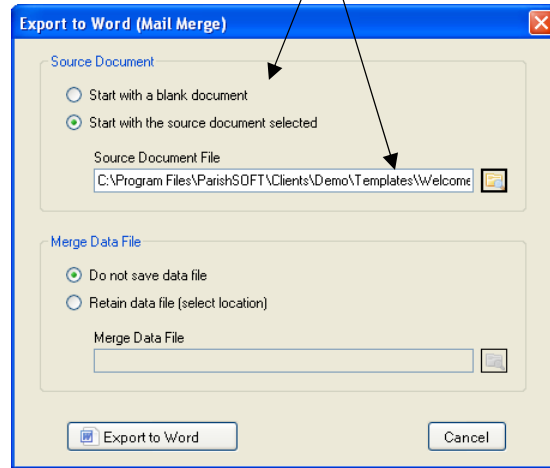
Parish IQ lets you create a Mail Merge using your query results. Be sure that your query contains the columns (i.e., fields) that you will need to deliver your merged document (i.e., Mailing Name, address, city, state, and zip)—only the fields that are included in your query will be available for you to insert into your Word template file.

Once you execute your query, use the following steps to merge to Word.

1. Click the **Query Results** menu > **Merge to Word Document** (or use the shortcut keys <Ctrl + W>).



2. Choose either a blank document or an existing .doc or .dot file as your Source Document.



3. If you wish to save a data file to retain a record of your merge data, click the **Retain data file** option and select a location for the file.
4. Click the **Export to Word** button.
5. Add Merge fields and any necessary edits to your document, and merge as usual with your Parish IQ query data.

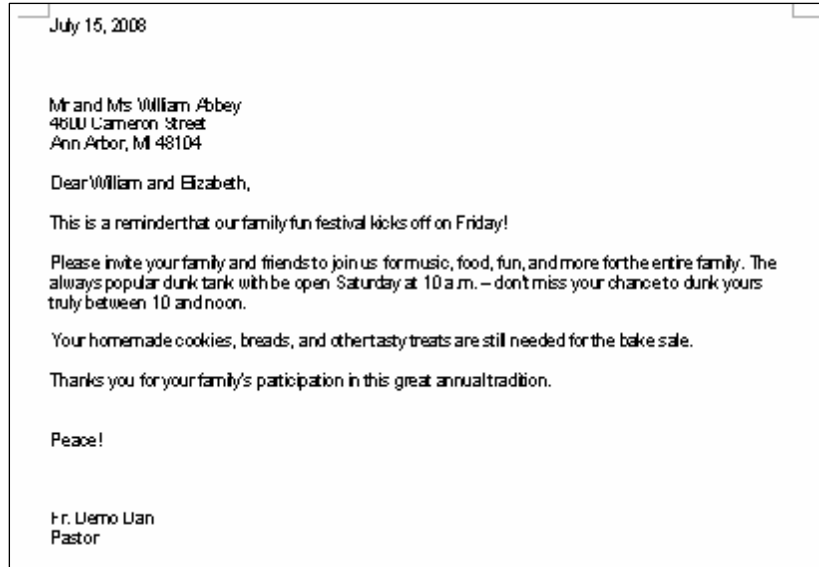
<p>June 19, 2008</p> <p>«Mailing_Name» «Home_Address_1» «Home_City», «Home_State» «Home_PostalCode»</p> <p>Dear «Mailing_Name»,</p> <p>Thank you for your generous School Building Fund pledge of \$«Total_Pledge_Amount»! Because of the generosity of parishioners like you, we are thrilled new K-6 building in June 2009.</p> <p>Your commitment to this cause will provide great youth</p> <p>Peace!</p> <p>Fr. Demo Dan Pastor</p>	<p><b>Sample Word document with Parish IQ data fields before merge (left) and after merge (below).</b></p>
<p>June 19, 2008</p> <p>Vahan Abbeyers 340 Jennings Rd New York, NY 10003</p> <p>Dear Vahan Abbeyers,</p> <p>Thank you for your generous School Building Fund pledge of \$100! Because of the generosity of parishioners like you, we are thrilled to announce that we will be able to break ground on our new K-6 building in June 2009.</p> <p>Your commitment to this cause will provide greatly improved classroom and extracurricular spaces for our youth</p> <p>Peace!</p> <p>Fr. Demo Dan Pastor</p>	

## Email Merge


Microsoft Outlook users can use the **Merge to Email** function to send a Mail Merge document electronically to email addresses returned in any Parish IQ query.

Emails will be sent individually to each email address (unless you specify otherwise in your **Send options**). A copy of each message will be stored in your **Sent** folder in Outlook—so you'll always have a record of what was sent to whom.

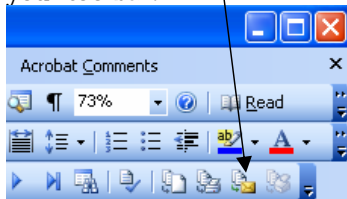
Click the **Merge to Email** button to turn your Mail Merge letter into an email.



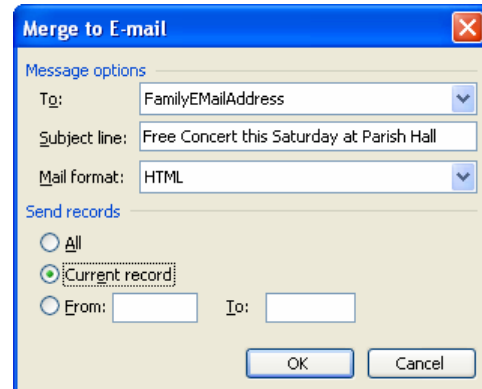
Complete the following steps to create an Email Merge from Parish IQ.

1. Be sure to select an email address field as one of the columns in your query (e.g., **FamilyEMail Address**).
2. Create your Mail Merge from Parish IQ as usual (for instructions, please see *Merge Query to Word* on the previous page), and click the  icon to view the contact information in your merged records.

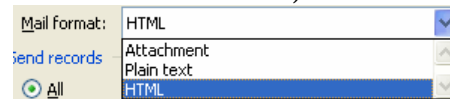
3. Click the **Merge to Email** icon on your toolbar.



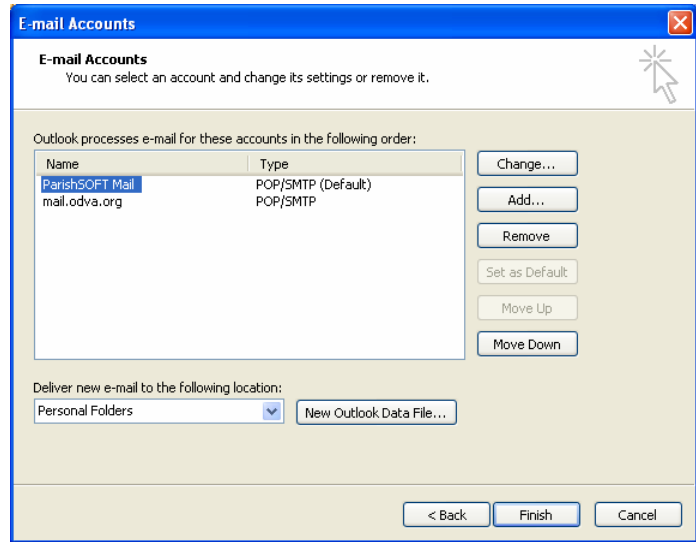
4. Specify your **Message options**:



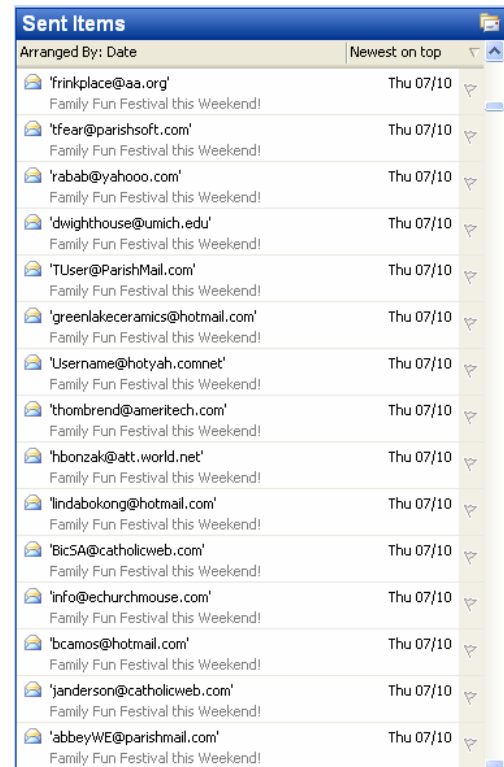
- a. **To:** choose the email address from your query.
- b. **Subject line:** type the subject of the email message
- c. **Mail format:** choose HTML, Plain text, or Attachment (i.e., to send your merge document as an attachment to the email).



5. Specify your **Send options**:
  - a. **All**: Send email to all addresses in this Merge
  - b. **Current Record**: Send email just to person or family on the current page of the Merge document.
  - c. **From/To**: Send email to the people or families in the page range specified for the Merge document.
  
6. Your Email will be sent immediately from your default email account in Microsoft Outlook once you click the **OK** button (i.e., **OK = SEND**). Emails will be sent to each individual address in your selected group. If you have multiple email accounts, you can open Outlook and click **Tools > Email Accounts** to verify your default account information prior to sending the email.



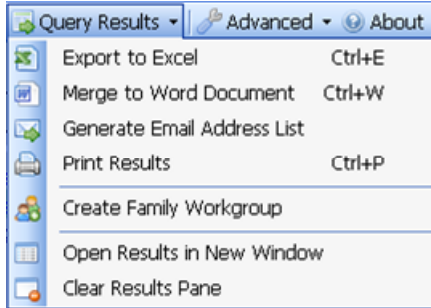
Outlook's Sent folder shows a copy of each email message sent via Email Merge.



## Print Results

Once you execute your query, complete the following steps to print your query results.

1. Click the **Query Results** menu > **Print Results** (or use the shortcut keys <Ctrl + P>).



2. Parish IQ will display a print preview of your report. Click the **Printer** icon, and then choose your printer and set any print preferences.

Females 18 to 35		
'Members Full Name'	'Members Age'	'Contact Info Home Phone'
Zarchekiak, Katina	45	616-458-2525
Fear, Teresa	45	734-555-0036
Anderson, Martha	44	517-285-5468
Coulter, Elyse	44	734-231-8386
Kendall, Catherine	44	734-652-4566
Lin, Amanda	44	313-555-1283
Ryan, Angela	44	734-555-9121
Anderson, Carrie	43	734-994-2323
Varden, Nancy	43	734-778-4561
Smith, Beth Ann	43	734-555-7812
Wheeler, Diane	43	734-555-1688
Wall, Marie	43	734-555-7374
Nowka, Melinda	43	734-998-0230
Neiman, Tianna	43	734-564-7895
Brinks, Shirley	43	555-555-5555
Gabriel, Kathryn	42	734-555-0613
Manchester, Adrianna	41	734-788-3235
Manchester, Adrianna	41	734-788-3235
Trump, Ivana	41	212-555-5555
Collins, Kristine	40	734-123-4567
Collins, Kristine	40	734-123-4567
Jackson, Marie	40	734-555-0000
Stevenson, Caroline	39	517-258-9659
Francis, Amy	39	517-989-5536
Jordan, Marie	38	616-825-6363
Amos, Catherine	38	734-555-9751
Gearhart, Rachel	38	734-785-4564
Trump, Melania	38	212-555-5555
Lake, Rikki	37	734-555-5821
Thomas, Anita	37	734-555-0000
Zambora, Heather	37	310-301-0130
Toulis, Margaret	36	734-123-4561
Williams, Karen	36	513-459-2439
Plania, Suzanna	35	734-457-3232
Ingram, Dawn	35	517-555-8973
Camp, Marian	34	734-555-1881
Creighton, Christina	34	734-234-2344
Xavier, Betty	34	734-555-2030
Vaughan, Ellen	34	734-555-1817
Bailey, Nancy	34	734-555-1168
El Wartig, Rabab	33	734-384-9200
Schmidt, Jenny	33	770-707-7707
Johnston, Emily	32	734-205-6355
Stephens, Melissa	31	602-988-1937
Derida, Debra	30	734-654-0456

## Create Family Workgroup

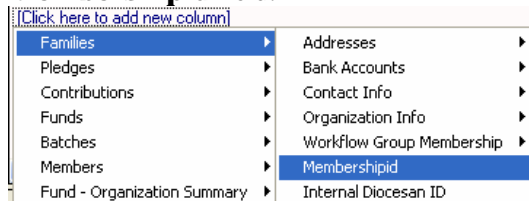
Use your Parish IQ query to create a static workgroup that contains every family in your query results. Family workgroups that you create using Parish IQ are available from your Family Directory software, making it easy to communicate effectively with any group of families via email, letter, or NotifyNow, which delivers instant text or voice messages to any group via phone, fax, pager, or email address.


Static family workgroups created through Parish IQ are not dynamically updated like queries, so when you need to update the information in your workgroup, simply run the query again and create a new, updated workgroup with a new name.

The Workgroup utility requires that you have a **Families Membershipid** column within your query so that it can map your query results to the appropriate family records.

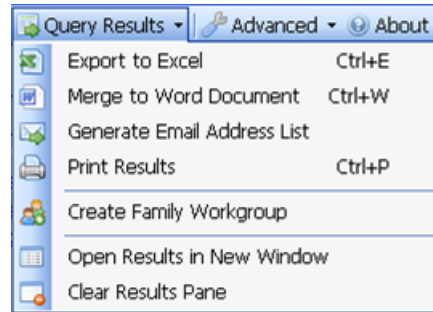
Use the following steps to create a new workgroup from Parish IQ.

1. If your query does not currently contain the [Families Membershipid](#) column, add it by clicking the link [\[Click here to add new column\]](#) and selecting the **Families > Membershipid** field.

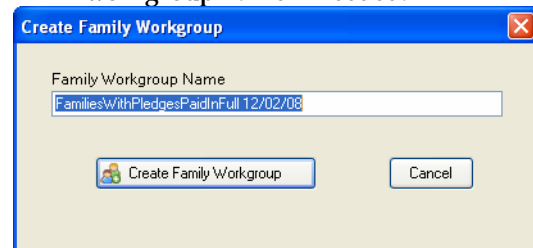


2. Click the **Execute Query** button  to run the query.

3. Click the **Query Results** menu > **Create Family Workgroup**.



4. Parish IQ will assign a **Family Workgroup Name** based on the name of the query—edit the workgroup name if needed.



5. Click the **Create Family Workgroup** button.
6. Parish IQ will inform you that your workgroup was created successfully. Click the **OK** button to return to the main window.

*CHAPTER 3*

---

*ADVANCED QUERY AND  
SERVER MANAGEMENT*

# Manage Queries

## Filter/Sort the List View

### The Manage Queries

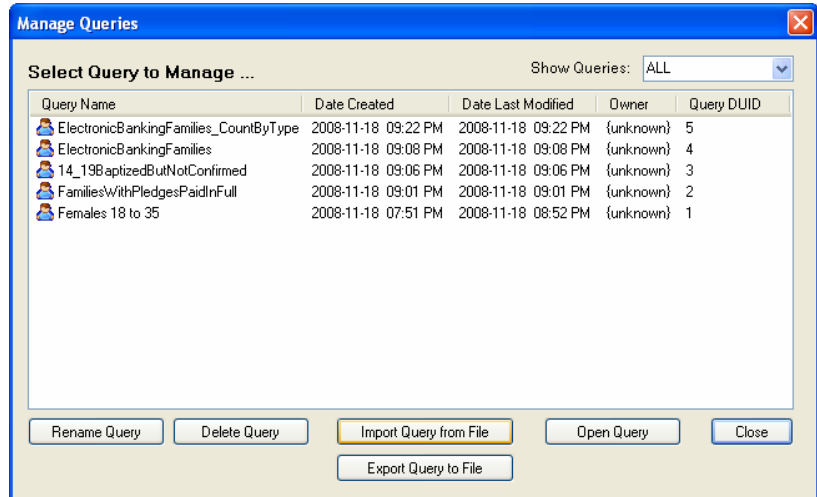
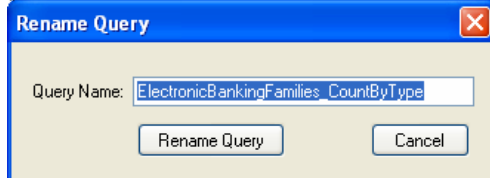
The **Manage Queries** button opens the *Manage Queries* window. Use the **Show Queries** lookup table to filter this list to view the queries you wish to see, including:

- ALL
- My Queries Only
- Global Queries Only

Sort any list of queries by clicking on the column headers. Query lists will sort alphanumerically by default. To view the most recent in ascending order, click the **Date Last Modified** column. Click again to sort in descending order.

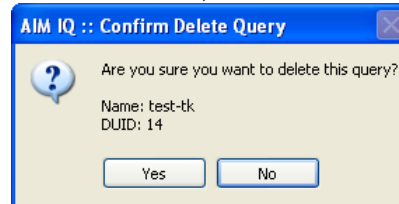
## Rename a Query

To change the name of any query, select it from the list view and click the **Rename Query** button. Edit the query name as needed and click **Rename Query**.



## Delete a Query

To delete a query, select it from the list view and click the **Delete Query** button. Click **Yes** on the confirmation screen to proceed with the deletion, or click **No** to cancel.



## Export Query to File

The **Manage Queries** menu lets you export any query to an .xml file without requiring you to execute the query first.

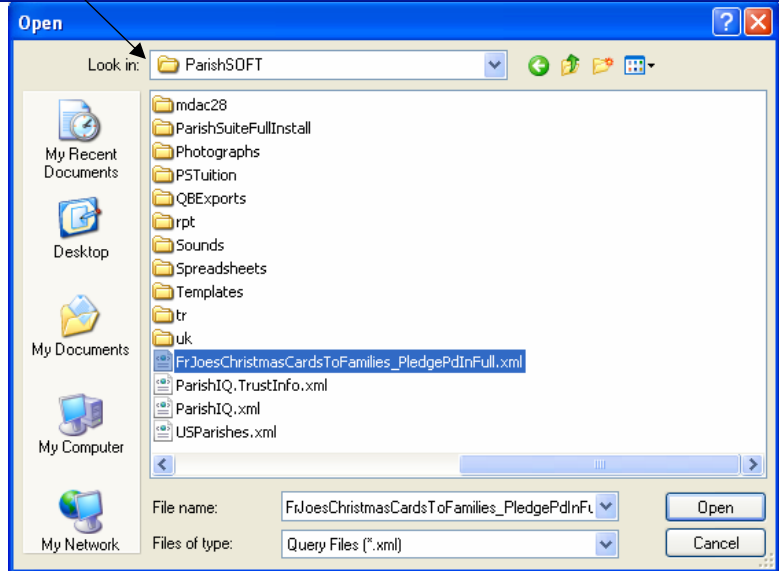
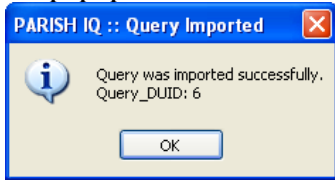
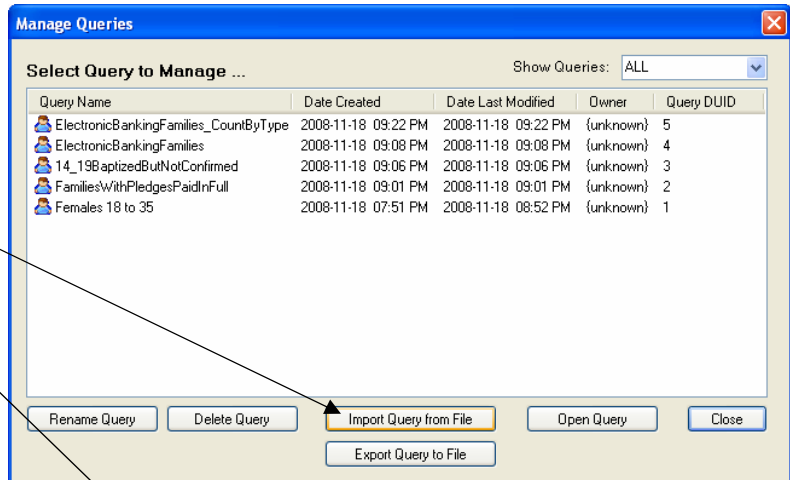
1. Click to select the **Query Name** you wish to export.
2. Click the **Export Query to File** button.

You can also export to XML from the **Save As** window—see page 18 for details.

## Import Query from File

You can import any .xml query file to analyze and manipulate it using Parish IQ.


1. From the *Manage Queries* screen, click the **Import Query from File** button.
2. Select the .xml file from your local hard drive or network location and click **Open**.
3. Parish IQ will import the file and confirm the success of the import—click **OK** to close the popup screen.



## Open Query

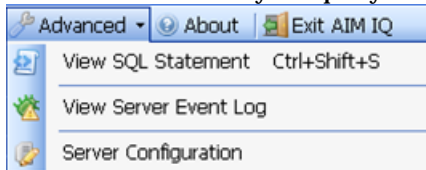
From the *Manage Queries* screen, select the Query Name and click the **Open Query** button.

## Close Manage Queries

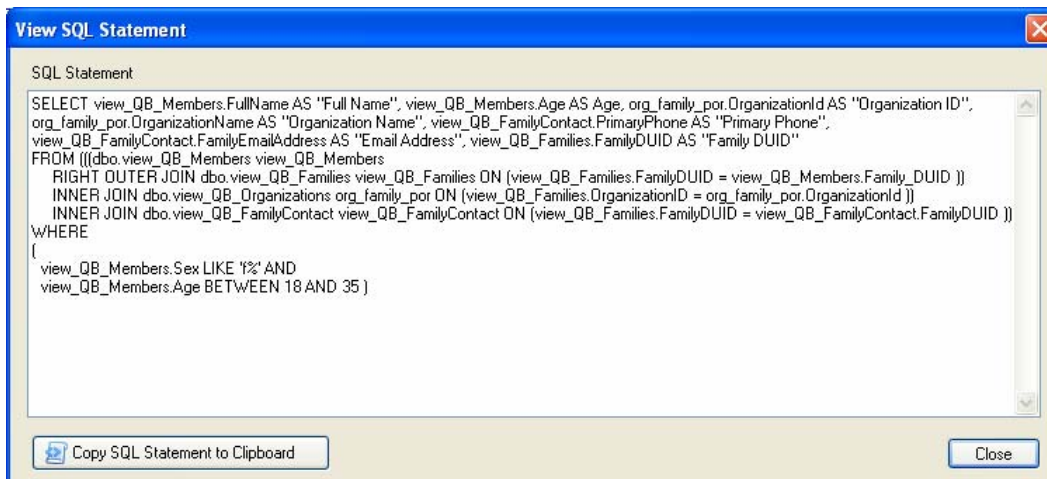
Click the **Close** button or the red X  in the upper-right corner of the window to exit the *Manage Queries* screen.

## Translate Query to SQL Statement

Parish IQ's **Advanced** menu offers a **View SQL Statement** option that opens the SQL Statement version of your query.

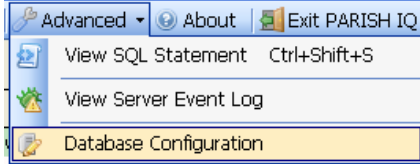


Click the **Copy SQL Statement to Clipboard** button to copy. You can paste the SQL Statement and run it within your Microsoft Access database.



## View Server Settings

You can view and update your server settings from Parish IQ's **Advanced > Database Configuration** menu option.

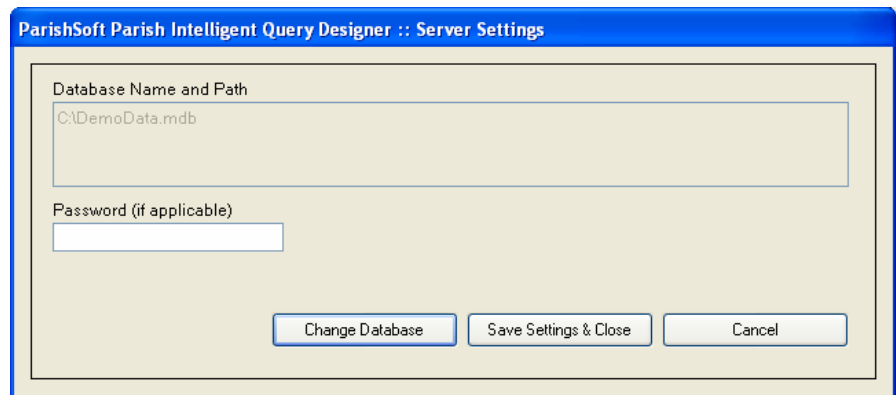


The *Server Settings* screen displays your **Database Name and Path** and **Password** field.

**Change Database** lets you explore your network or hard drive to select another database to query using Parish IQ.

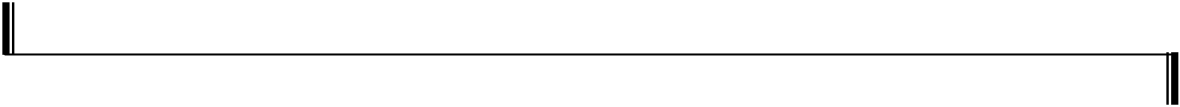
**Save Settings & Close** saves any changes and exits the *Server Settings* screen.

**Cancel** abandons any unsaved changes to this screen and restores your previously saved settings.



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