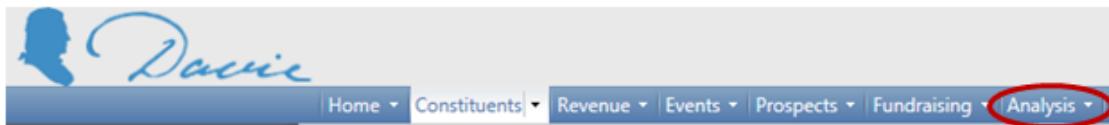


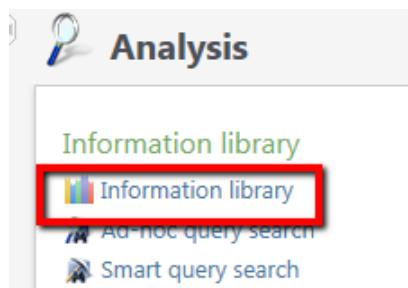
How To Add a Smart Query

To set up a smart query:

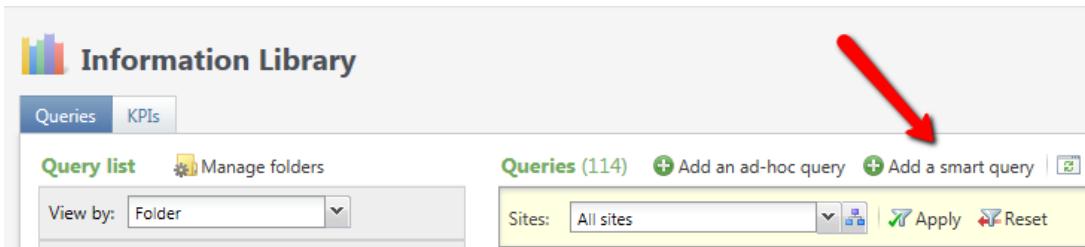
1. Click on **Analysis** on the Navigation Bar.



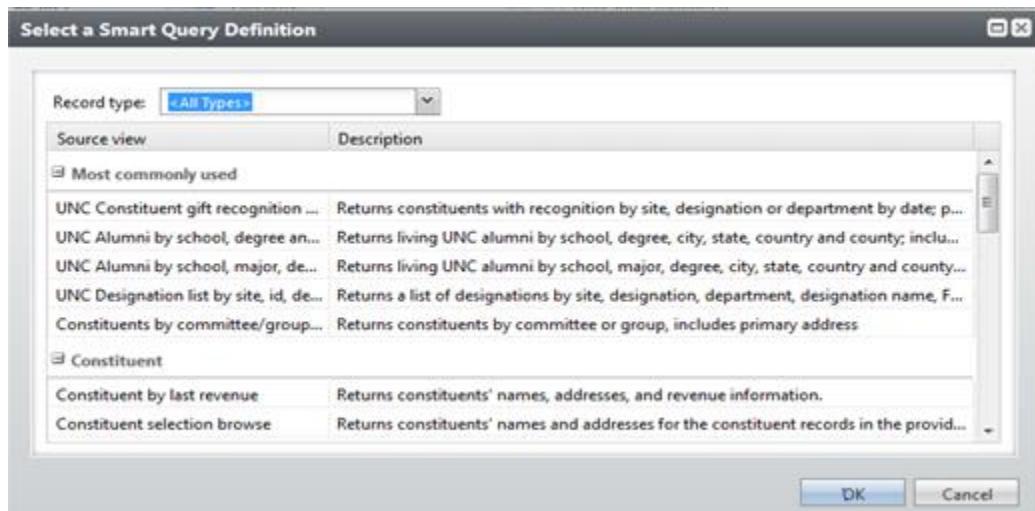
2. Click on **Information Library**.



3. Click the *Add a smart query* button.



4. Scroll through the choices and select the smart query definition you'd like to use. A guide to the definitions for the smart queries currently approved for use (called **Smart Query Definitions**) can be found under *Davie 301 – Smart Queries and Export Processes* on the Davie Portal at <https://davie.unc.edu/davie-training/courses/davie-301-extracting-data-preconfigured-queries-reports/>.



How To Add a Smart Query

5. Enter your desired parameters. *Note:* If you use a date range as part of your criteria you will need to enter both Start date and End date.

New Smart Query

Parameters Results Set save options

Recognition Effective Date between: 7/1/2015

and: 6/30/2016

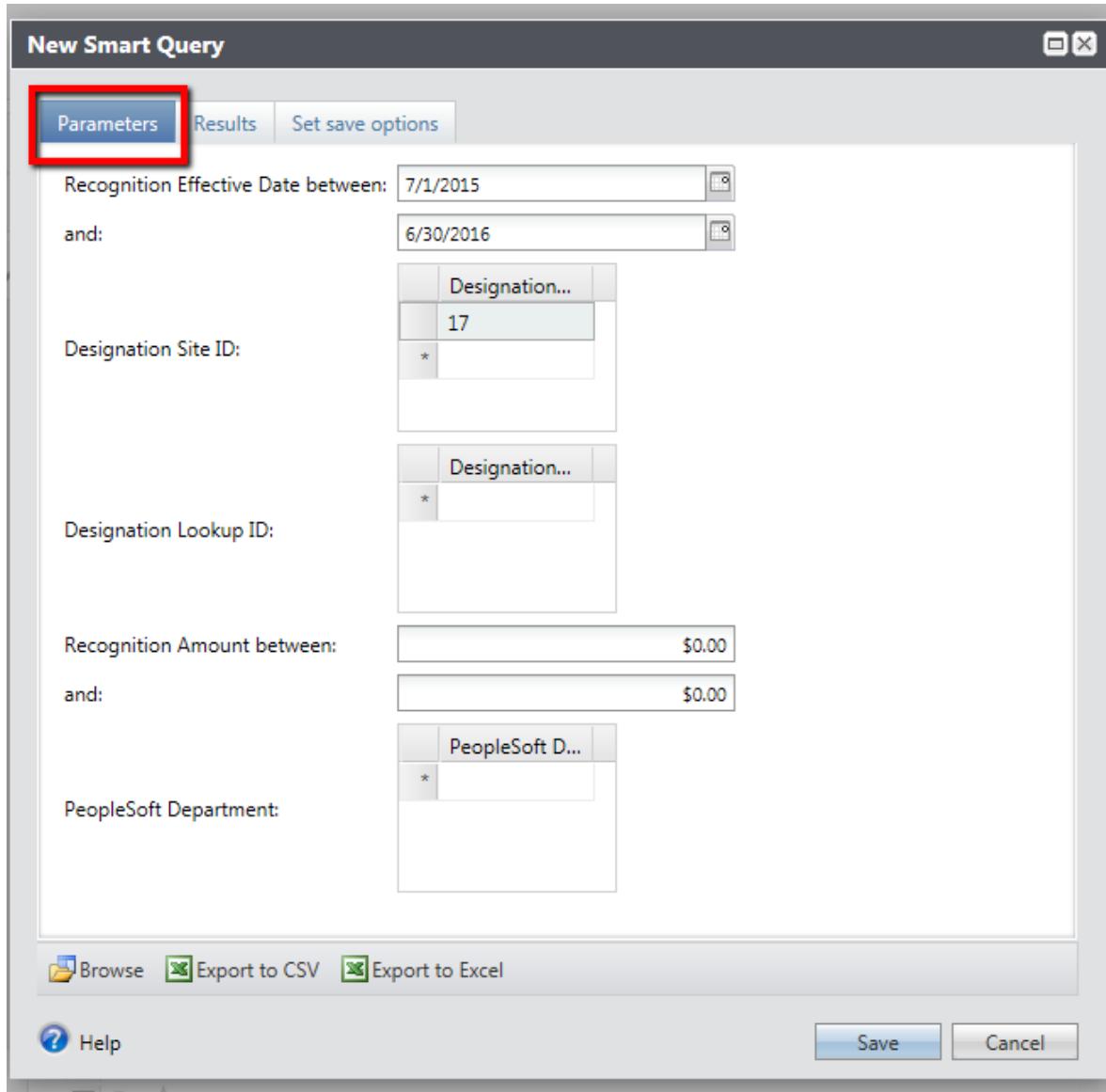
Designation Site ID:
Designation...
17
*

Designation Lookup ID:
Designation...
*
*

Recognition Amount between:
\$0.00

and:
\$0.00

PeopleSoft Department:
PeopleSoft D...
*



- Data within a parameter creates an **Or** function (for instance, for the smart query shown above, if more than one Designation Lookup ID is entered, it will look for any gifts to either of those designations) for the date range chosen
- Data in more than one parameter creates an **And** function
- In a query where you use Site, Designation Lookup ID or PeopleSoft Department (Report Code 2):
 - **Site** is all inclusive of everything for that particular School or Site.
 - **Designation Lookup ID** is for specific designations - so if this is used, no other parameter needs to be entered other than date.
 - **PeopleSoft Department** is for specific departments - so if this is used, no other parameter needs to be entered other than date.

Davie

How To Add a Smart Query

6. After entering your criteria, check your results to make sure you are pulling the right data by clicking on the **Results** tab. **Note:** Sometimes you have to click on the **Results** tab more than once (or click the refresh icon in the query dialogue box), click back to the **Parameters** tab and then on the **Results** tab again if you get a blank screen the first time you click on **Results**.

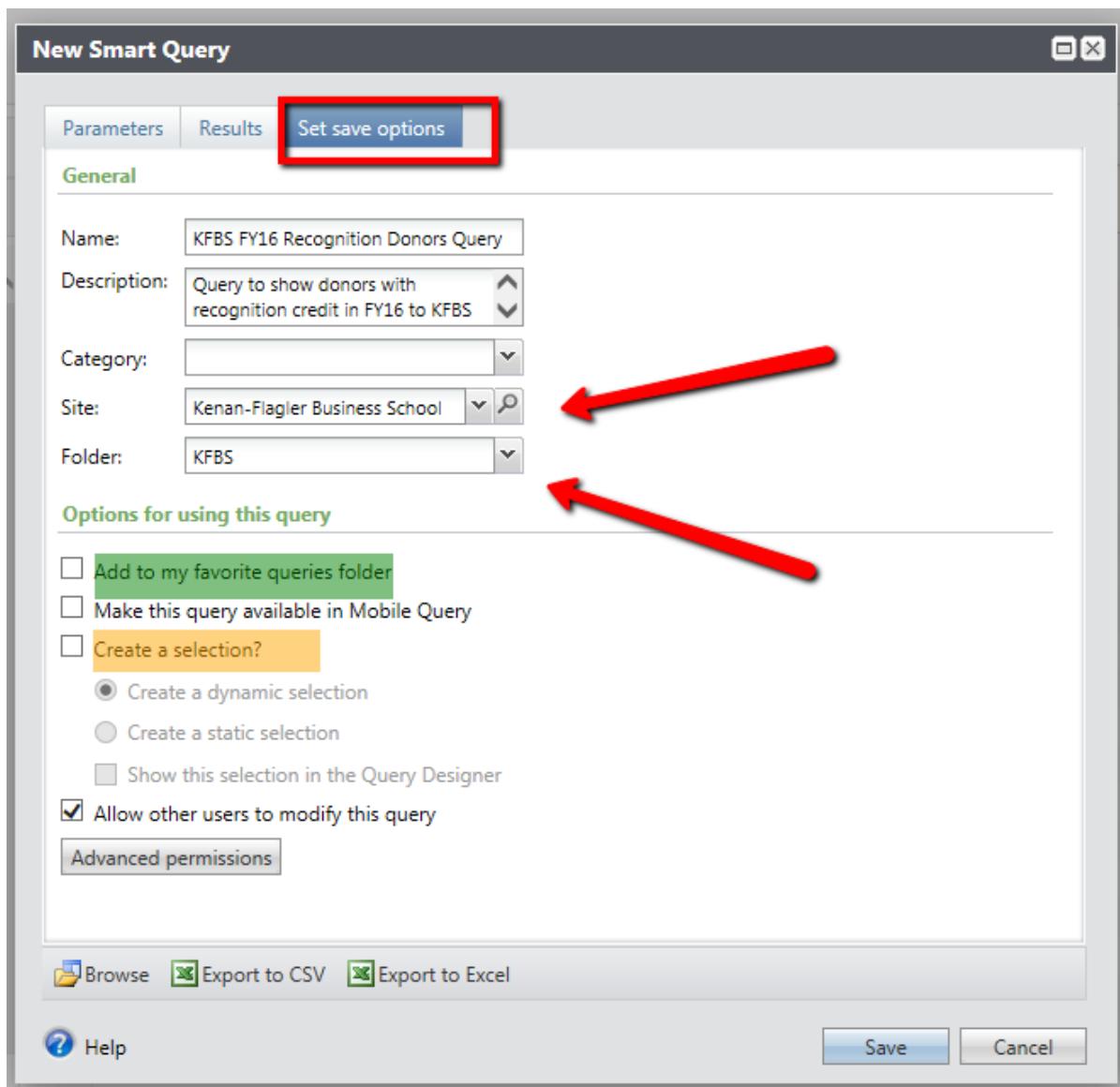
The screenshot shows the 'New Smart Query' dialog box. The 'Results' tab is selected, indicated by a blue border around it. The main area displays a grid of 2068 records found, with columns for Lookup ID, Deceased, Inactive, Gives anonym..., Title, and Title 2. At the bottom of the dialog, there is a toolbar with buttons for 'Browse', 'Export to CSV' (which is highlighted with a red box), 'Export to Excel' (also highlighted with a red box), 'Save', and 'Cancel'. A note at the bottom states: 'Note: From the Results screen, you have the option to Export the results to Excel or in a CSV format. Every query does not have to be saved.'

Note: From the Results screen, you have the option to Export the results to Excel or in a CSV format. Every query does not have to be saved.

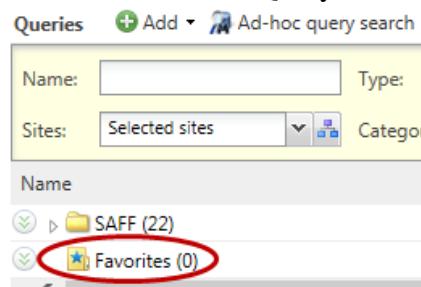
Davie

How To Add a Smart Query

7. If the results need to be saved, name your smart query (remember the naming conventions) by clicking on the **Set save options** tab. Write a description to help you remember the criteria for this query, select your site and save in your folder. See the options below.



- Checking the *Add to my favorite queries folder* option will allow the query to be visible in a separate folder under the Query view



How To Add a Smart Query

- Checking the *Make this query available in Mobile Query* option makes the query compatible for viewing on a tablet or smartphone
 - Checking the *Create a selection* option is not generally advised. Selections should only be created if they are going to be used in a process (i.e. a Direct Marketing Effort or an Export Process)
 - The *Create a dynamic selection* option updates the constituents if they meet the criteria the next time the query is executed
 - The *Create a static selection* option updates the constituent's contact information but doesn't add to nor remove constituents. Static selections are required for marketing efforts
 - The *Show this selection in the Query Designer* option should only be checked if this query is going to be used inside of another query to obtain query results.
 - Unchecking the *Allow other users to modify this query* option prevents other query users from modifying your query.
8. Click the **Save** button. The smart query is all yours to use how and when you choose.

NOTE: Not all Smart Queries in the list have been approved for production – only use those listed below to ensure accurate results.

- **UNC Constituent gift recognition by designation and amount**
 - Returns constituents with recognition by site, designation or department by date
- **UNC Designation list**
 - Returns a list of designations by site, designation, department, designation name, FRS number, purpose type and date
- **UNC Gift revenue payments by date and designation info**
 - Returns revenue payment transactions at the application detail level that includes constituent name and primary address information, not to be confused with
- **UNC Alumni by school, degree and location**
 - Returns living UNC alumni by school, degree, city, state, country and county; includes ex-mats and looks at primary address
- **UNC Alumni by school, major, degree and location**
 - Returns living UNC alumni by school, major, degree, city, state, country and county; includes ex-mats and looks at primary address
- **Constituents by committee/group membership**
 - Returns constituents by committee or group, includes primary address
- **UNC Current students by school, level, class, etc.**
 - Returns current student constituents with education information and primary address
- **UNC Constituents by educational involvement**
 - Returns constituents by educational involvement, includes primary address
- **UNC Interactions completed by date, site, prospect mngr, own**
 - Returns completed interactions with status, comments, site, rating, employer, and constituent address (does not include pending steps)
- **Event registrants by event and date**
 - Returns events with registered constituents name, ID and balance
- **UNC Fundraising purposes with stewarded donors**
 - Returns fundraising purposes with administrators and stewarded donors with no end date including purpose details, donor name and primary address