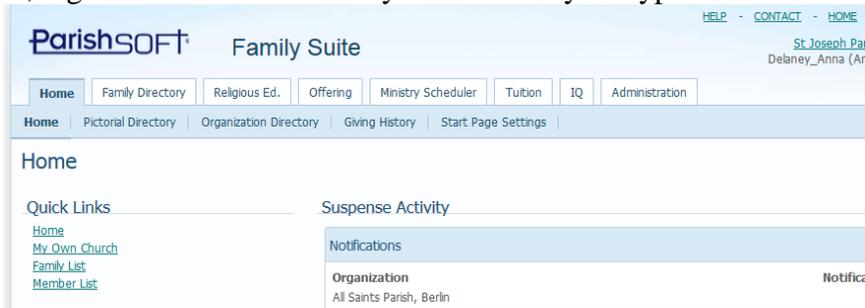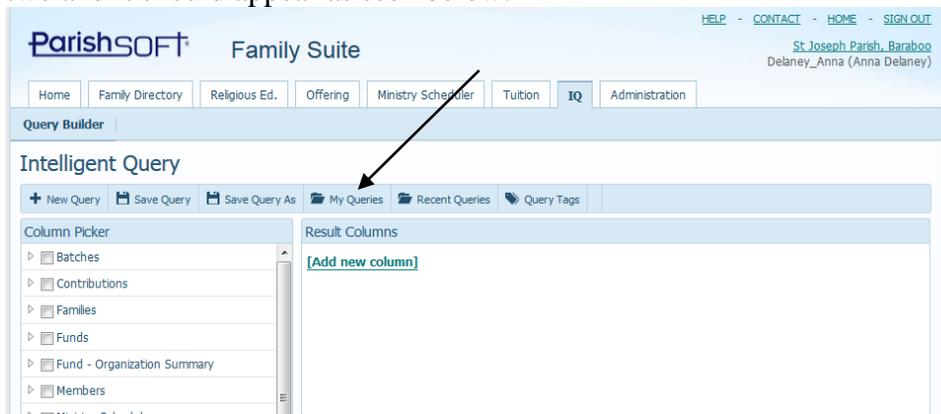**Pulling Anniversary couples for 25th, 40th, 50th and above in IQ**

1. First, log into **ParishSOFT** and you will be at your typical home screen:


2. Next, click on **IQ** tab and you will be in the main screen where you can open existing and create new queries. You may see the screen filling, wait a second or two and it should appear as seen below:

3. Click the **My Queries** button, as seen above, and search for the **Anniversary Cleanup 25, 40, 50 and above** query. You can search in the **Query Name** area for the words: Anniversary and it will find you the queries we will use in the following steps, as seen highlighted below.
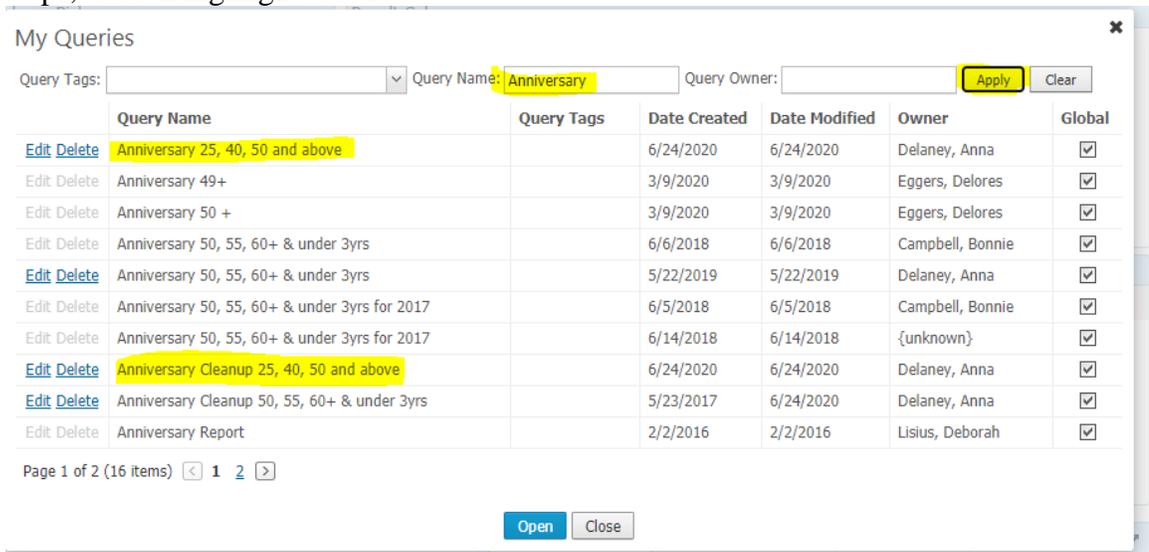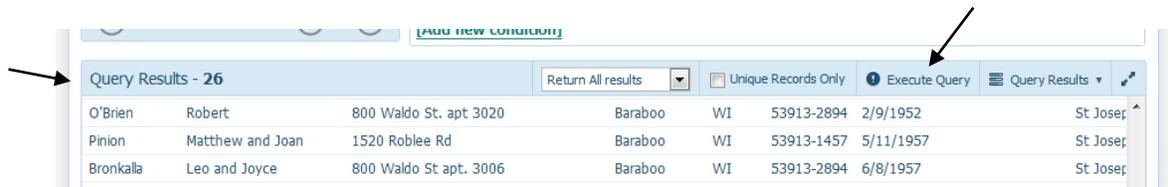
4. Click the name of the query to select it and then click **Open.** The query information will fill in on the screen, as seen below. We are running and looking at this query to find any member where their marital status is "single" and their Sacramental Marriage record still says married. (ex: the person passed away, but we forgot to change the overall Sacramental record)
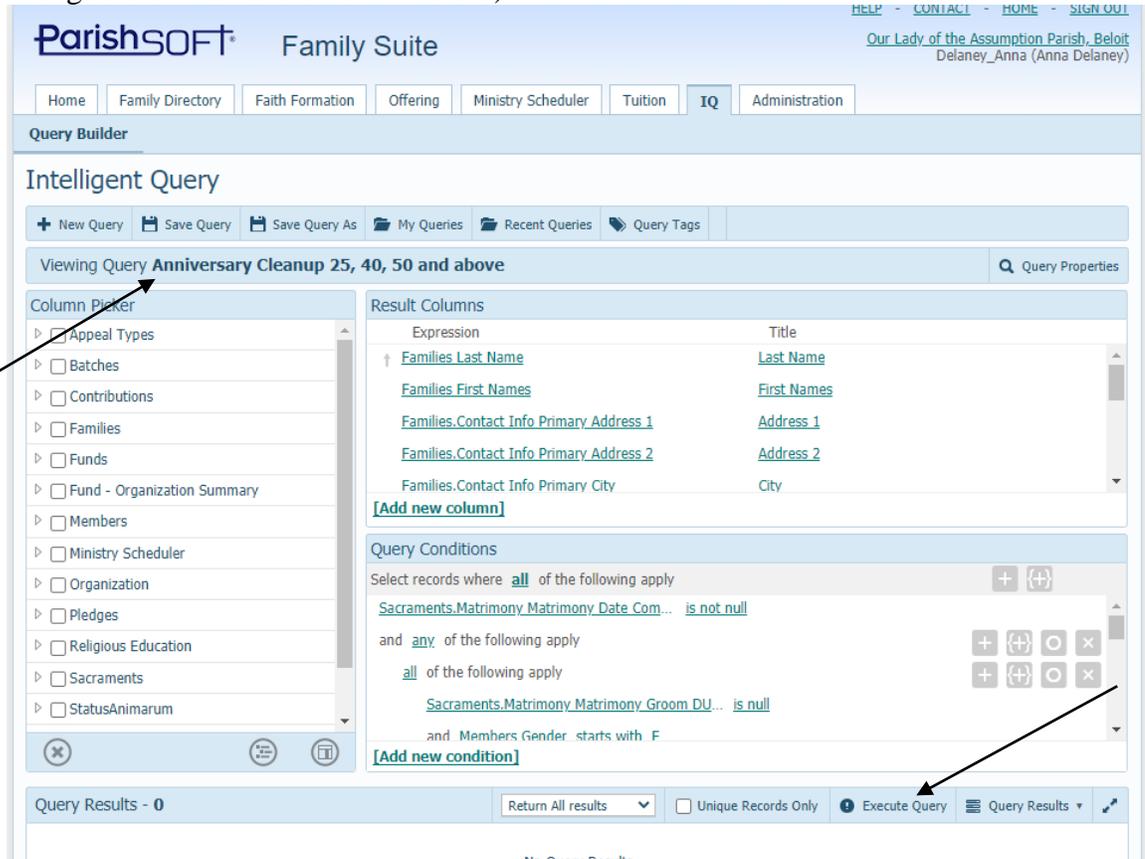

5. Scroll down to the bottom of the **Query Conditions** column, till you see the line: that says: **Families.Owner Organization Organization ID** and click where it says the number 10309. Next, enter your ParishSOFT ID number, found on the **Administration** tab, under the **Organizations** area. It is also called the POL#.

6. Click on the **Execute Query** button, as seen in the image below and you will get a listing of families that we need to look at, as seen below:

	Query Results - 26			Return All results ▼	☐ Unique Records Only	⬤ Execute Query	☰ Query Results ▼	
O'Brien	Robert	800 Waldo St. apt 3020		Baraboo	WI	53913-2894	2/9/1952	St Josep
Pinion	Matthew and Joan	1520 Roblee Rd		Baraboo	WI	53913-1457	5/11/1957	St Josep
Bronkalla	Leo and Joyce	800 Waldo St apt. 3006		Baraboo	WI	53913-2894	6/8/1957	St Josep

7. To the right of the Execute Query button, click the **Query Results** and select **Export to CSV.** Your computer will ask you what to do with the file, click **Open** and you will see a listing of the families we'll want to check and/or fix.
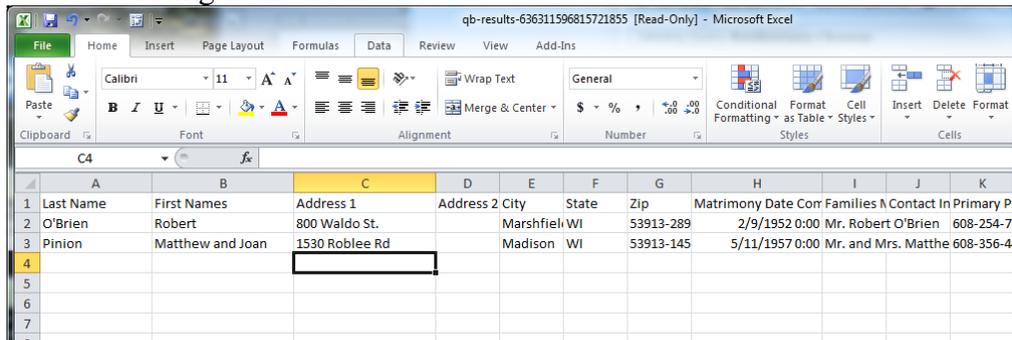

8. **Please note, if you do not go through to check these families/members there could be errors in the next report as members might not be listed correctly.
   A typical example on these records is the example shown below:

The member's Marital Status says "Single" but when we look at the sacramental marriage, they are still listed as "Married" even though one of the spouses died.
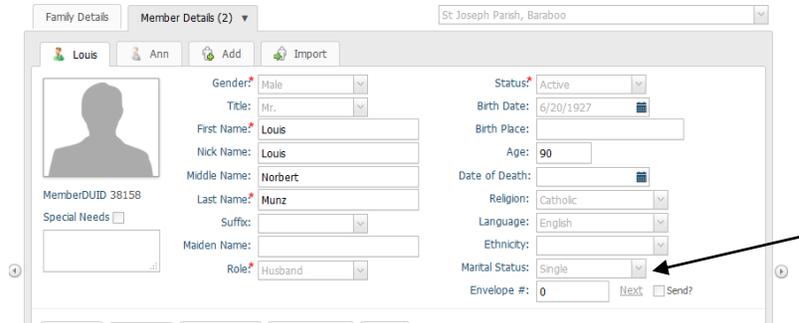
By clicking on the Member's Sacrament tab, then clicking Details to the far right of where the Marriage date is seen, we can pull up the sacramental details on the screen below.
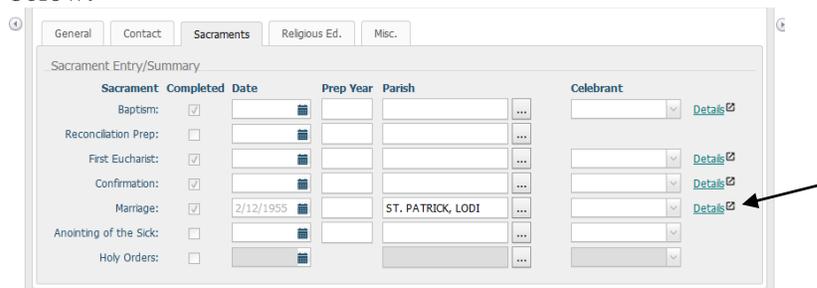
Changing the information under the Marital Status from Married to "**Widowed**" and then clicking the **Save** button will fix the marriage record for this individual below. When asked to update the main family record, in the Family List, click **OK.**


It is also best if you fill in the **Date Ended as the date of death of the spouse, if possible.

After working through all on the Anniversary Cleanup, you'll go to the next step.

9. Next, back in **IQ,** click the **My Queries** area again and select the **Anniversary 25, 40, 50 and above** query. Click to highlight the query, then click **Open.**


10. You will see the query fill in the main area, similar to below. The name is indicated below:
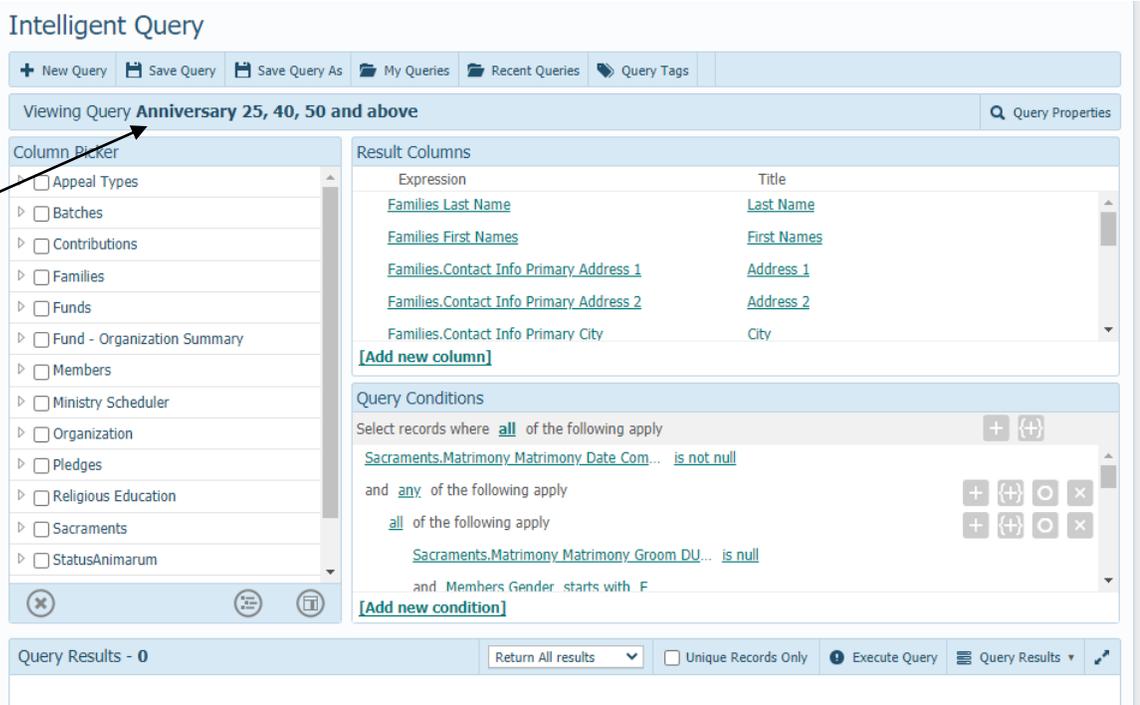
11. Scroll down to the bottom of the **Query Conditions** column, till you see the line: that says: **Families.Owner Organization Organization ID** and click where it says the number 10309. Next, enter your ParishSOFT ID number, found on the **Administration** tab, under the **Organizations** area. It is also called the POL#.

12. In the bottom right side, click on the **Execute Query** button, as seen below.
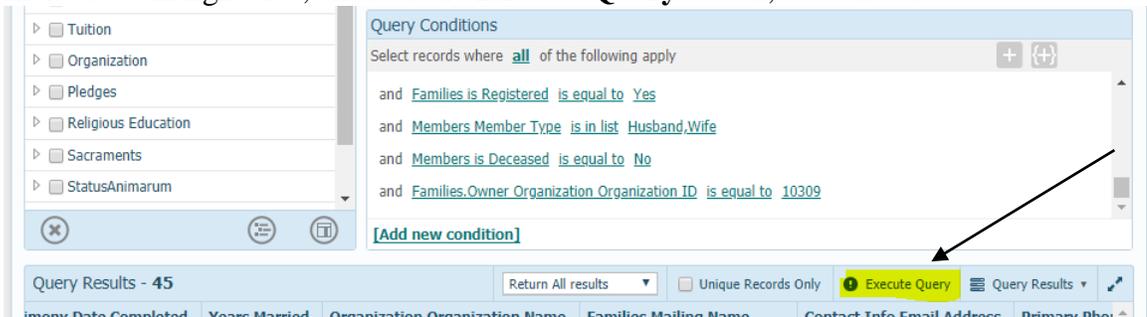
13. It will say that it is refreshing its results, as seen below. In the **Query Results** area, the families that have the oldest anniversaries are listed first, then the more recent. ("Anniversary year" is assigned at the start of the year so regardless of when the

couple has their actual anniversary date, they will still pull as the correct anniversary celebratory year on the query.)

14. You can do multiple functions in **IQ** with your results. If you wish to print labels, send the information to a Family Workgroup, name it, and use that to filter on your main Family List to print labels. (through the **Execute Query** button) If you wish to edit/work on this information in Excel, click the **Execute Query** button, click the **Query Results** button and then select **Export to CSV** as seen below. (which you could then be used for an import into your email management tool for a bulk email to check on their interest)

15. The system will either show a download button at the bottom of your internet browse or it will open the data in Excel, as seen below:

16. Please note and check in your data pull on the "First Name" fields. It should list two members. If it does not, you will want to check that couple/family manually as it could be that one member is missing on the names due to how we normally address the family, OR that the other member does not wish to be contacted by the parish.

17. In the example below, the first name of the family just listed Richard, as seen in the family's information below:

18. When we look at both members, Richard is active, but his wife is Lutheran and didn't want to be addressed by the parish. So, our data pull is showing correctly, but as a parish we need to make a judgement call on whether to include him and his wife in the anniversary report.

*Please note for 2020, the Office of Marriage and Family ONLY want to be given a list of anniversaries where the couple has indicated INTEREST in the anniversary celebration. If the couple has not expressed interest, please do not include them in your list that you send to the Diocese.