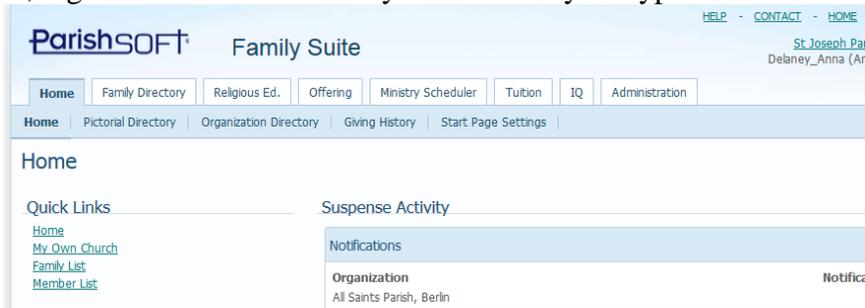
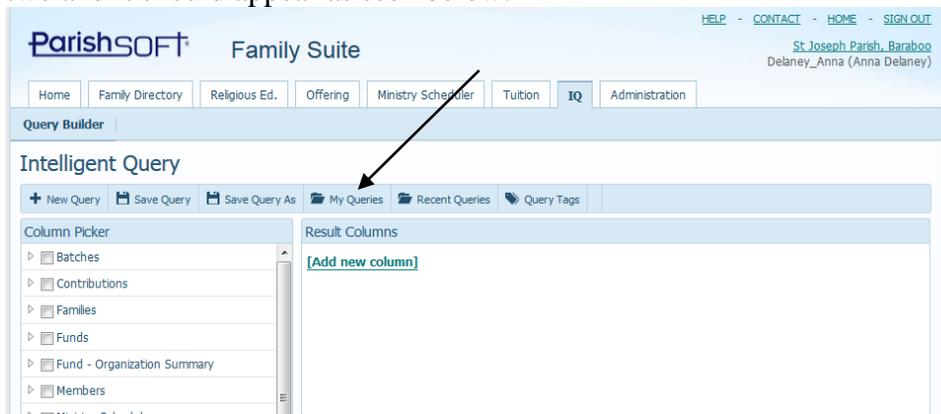


Pulling Anniversary couples for 25th, 40th, 50th and above in IQ

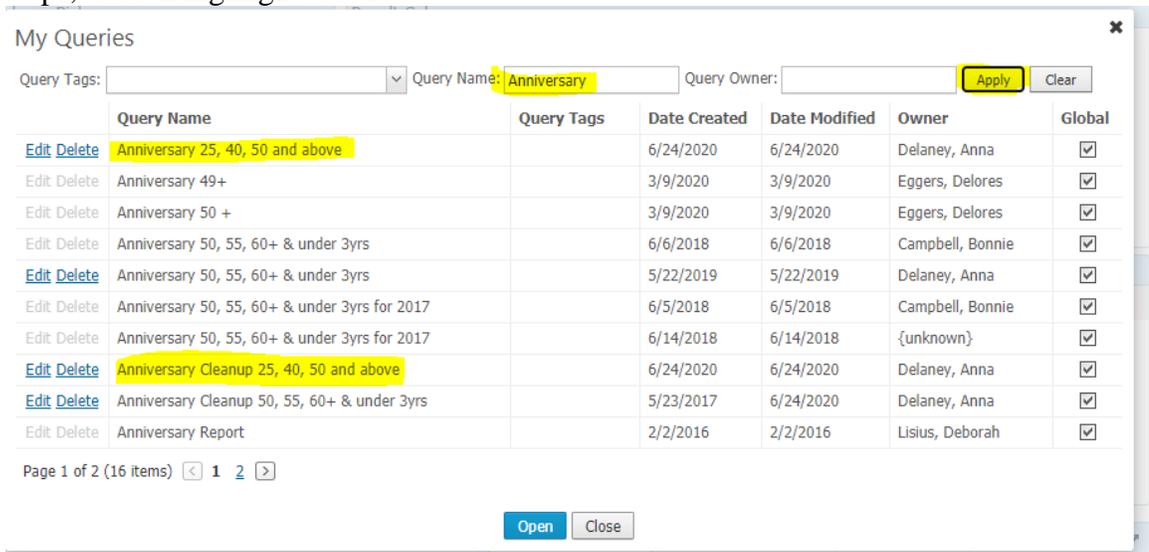
1. First, log into **ParishSOFT** and you will be at your typical home screen:



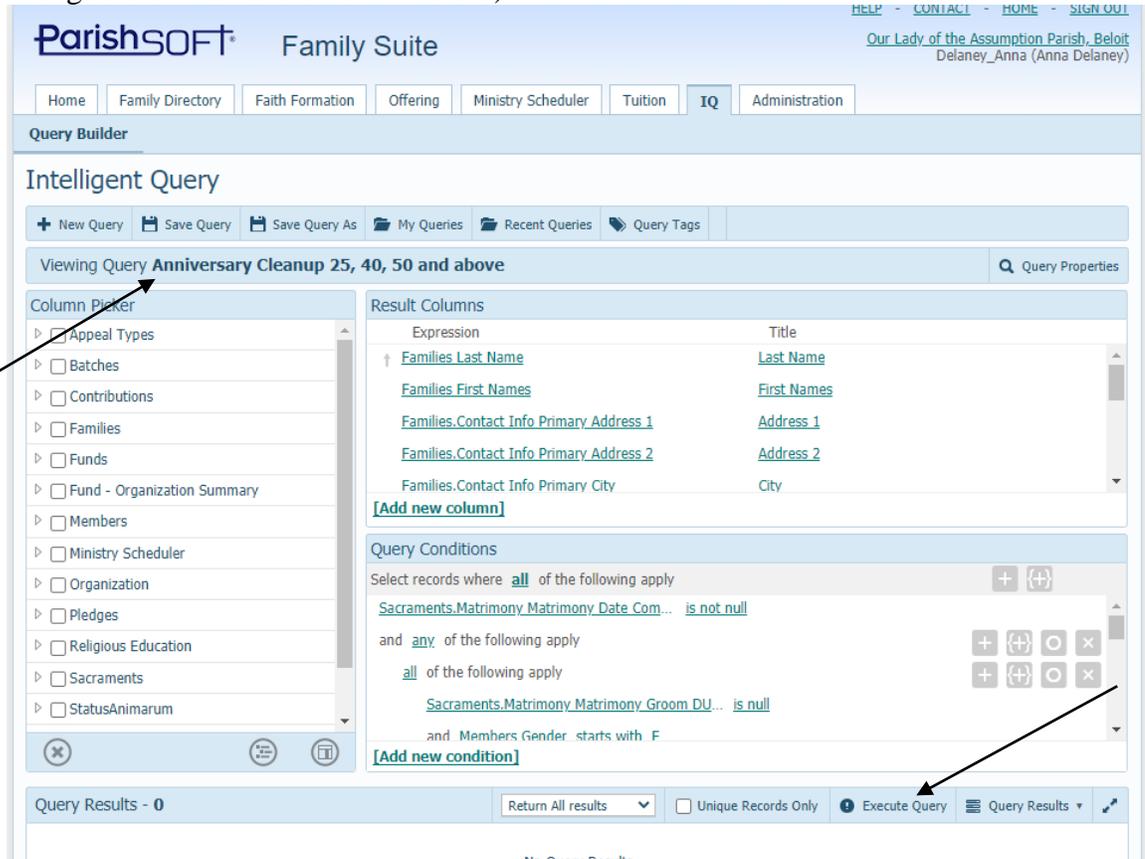
2. Next, click on **IQ** tab and you will be in the main screen where you can open existing and create new queries. You may see the screen filling, wait a second or two and it should appear as seen below:



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.



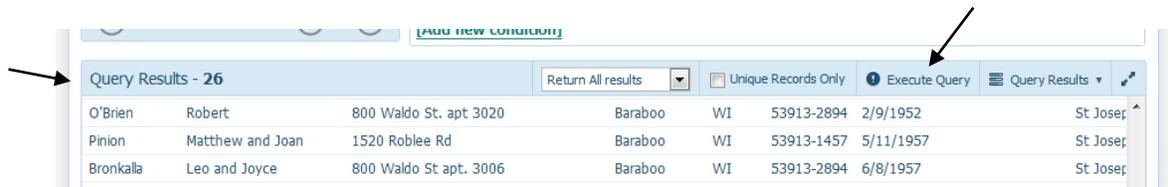
- Click the name of the query to select it and then click **Open**. The query information will fill in on the screen, as seen below. We are running and looking at this query to find any member where their marital status is “single” and their Sacramental Marriage record still says married. (ex: the person passed away, but we forgot to change the overall Sacramental record)



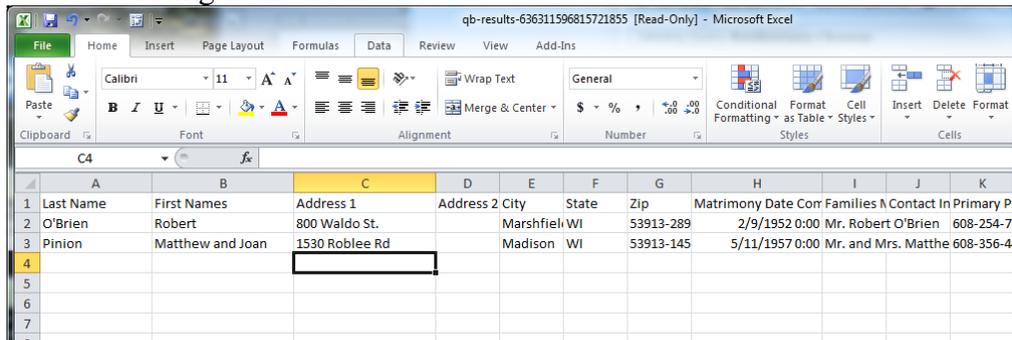
- Scroll down to the bottom of the **Query Conditions** column, till you see the line: that says: **Families.Owner Organization Organization ID** and click where it says the number 10309. Next, enter your ParishSOFT ID number, found on the **Administration** tab, under the **Organizations** area. It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



- 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:



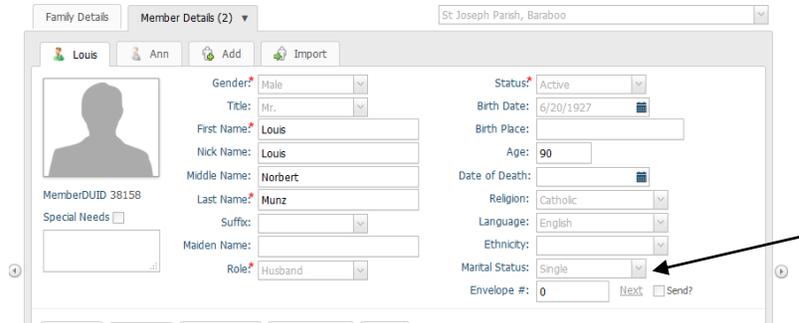
- To the right of the Execute Query button, click the **Query Results** and select **Export to CSV**. Your computer will ask you what to do with the file, click **Open** and you will see a listing of the families we'll want to check and/or fix.



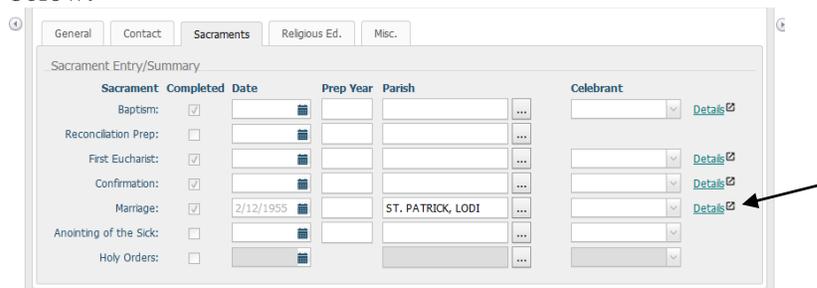
- **Please note, if you do not go through to check these families/members there could be errors in the next report as members might not be listed correctly. A typical example on these records is the example shown below:

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.

Louis Munz



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**.

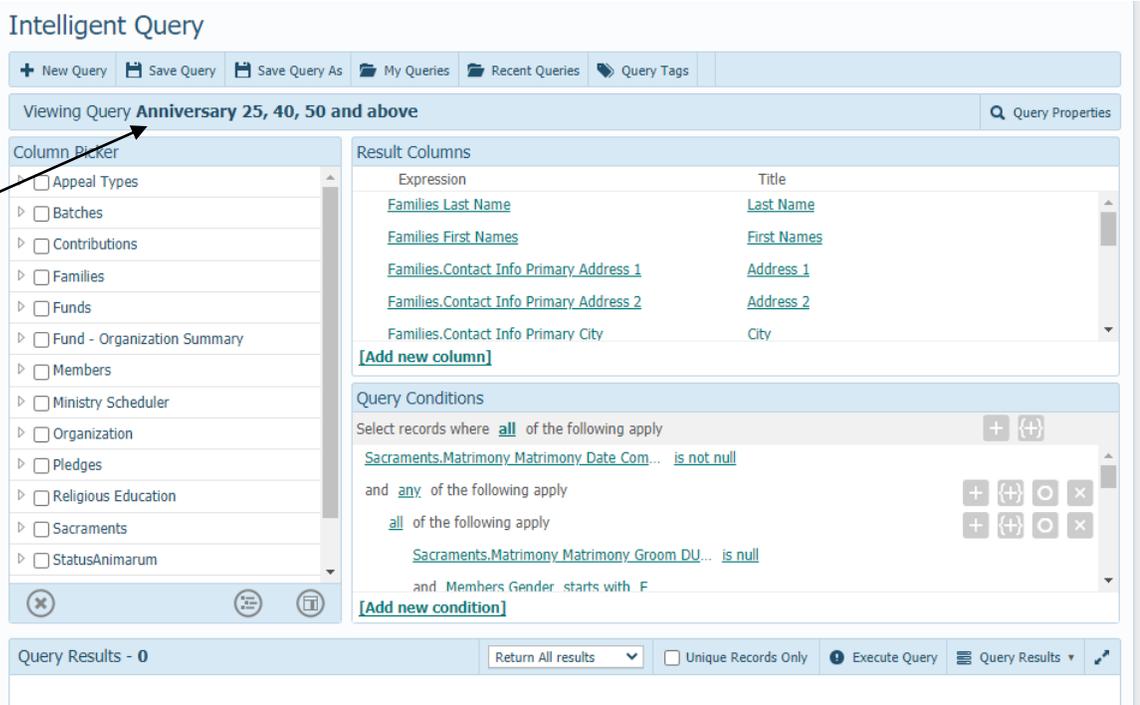
It is also best if you fill in the **Date Ended as the date of death of the spouse, if possible.

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**.

	Query Name	Query Tags	Date Created	Date Modified	Owner	Global
Edit Delete	Anniversary 25, 40, 50 and above		6/24/2020	6/24/2020	Delaney, Anna	<input checked="" type="checkbox"/>
Edit Delete	Anniversary 49+		3/9/2020	3/9/2020	Eggers, Delores	<input checked="" type="checkbox"/>
Edit Delete	Anniversary 50 +		3/9/2020	3/9/2020	Eggers, Delores	<input checked="" type="checkbox"/>
Edit Delete	Anniversary 50, 55, 60+ & under 3yrs		6/6/2018	6/6/2018	Campbell, Bonnie	<input checked="" type="checkbox"/>
Edit Delete	Anniversary 50, 55, 60+ & under 3yrs		5/22/2019	5/22/2019	Delaney, Anna	<input checked="" type="checkbox"/>
Edit Delete	Anniversary 50, 55, 60+ & under 3yrs for 2017		6/5/2018	6/5/2018	Campbell, Bonnie	<input checked="" type="checkbox"/>
Edit Delete	Anniversary 50, 55, 60+ & under 3yrs for 2017		6/14/2018	6/14/2018	{unknown}	<input checked="" type="checkbox"/>
Active	Anniversary Cleanup 25, 40, 50 and above		6/24/2020	6/24/2020	Delaney, Anna	<input checked="" type="checkbox"/>
Edit Delete	Anniversary Cleanup 50, 55, 60+ & under 3yrs		5/23/2017	6/24/2020	Delaney, Anna	<input checked="" type="checkbox"/>
Edit Delete	Anniversary Report		2/2/2016	2/2/2016	Lisius, Deborah	<input checked="" type="checkbox"/>

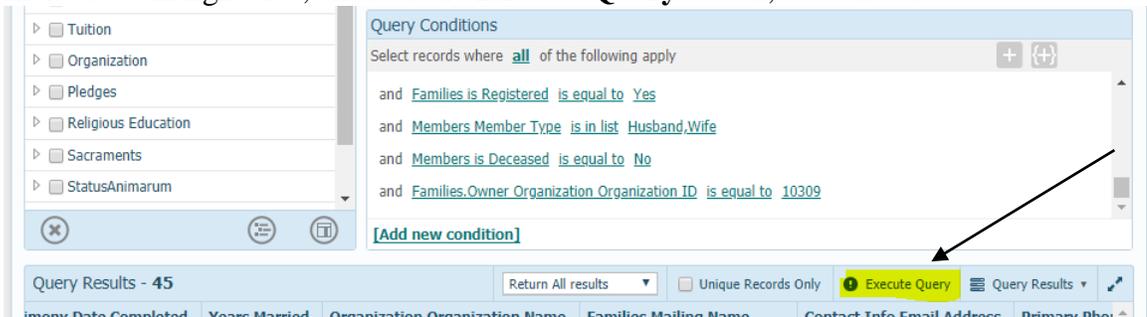
10. You will see the query fill in the main area, similar to below. The name is indicated below:



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.)

The screenshot shows a query builder window with the following conditions:

- Select records where **all** of the following apply
 - Sacraments.Matrimony Matrimony Date Co... is not null
- and **any** of the following apply
 - all** of the following apply
 - Sacraments.Matrimony Matrimony Groom D... is null
 - and Members Gender starts with F

Below the conditions is a table titled "Query Results - 323":

Last Name	First Names	Address 1	Address 2	City	State	Zip	Matrimony Date
Mead	Margaret and Richard	1700 S River Rd #354		Janesville	WI	53546	7/11/1942
Westphal	Robert and Lorraine	4481 Garfoot Rd		Cross Plains	WI	53528-9193	4/9/1947
Bates	Richard and Joyce	130 8th Ave		Baraboo	WI	53913-2109	6/6/1947
Bartlein	Robert and Janet	500 Bassett St, Apt 112		De Forest	WI	53532	8/23/1947
Urbanowski	Ray R.	3742 S Milton Shopiere Rd		Janesville	WI	53546	9/6/1947

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)

The screenshot shows a query results table titled "Query Results - 174" with a context menu open over the "Query Results" button. The menu options are:

- Export to CSV
- Mail Merge
- Generate Email Address List
- Create Family Workgroup

The table data is as follows:

Last Name	First Names	Address 1	Address 2	City	State	Zip	Matrimony Date
Harrop	Donald	2222 Wood Rd		Middleton	WI		
Krofta	Rudolph and Florence	All Saints Retirement	8210 Highview Dr., Rm 16	Madison	WI		
Slota	Dorothy	608 East St		Baraboo	WI		

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:

The screenshot shows a Microsoft Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H	I	J	K
	Last Name	First Names	Address 1	Address 2	City	State	Zip	Matrimony Date Completed	Contact Info	Primary Phone	Emerg
1	Smith	John	N457 Steinke Rd		Madison	WI	53719	8/30/1952 0:00		608-357-3319	
3	Jones	Dorothy	610 East St		Middleton	WI	53562	9/1/1962 0:00		608-346-4669	
4	Bates	Richard and Joyce	135 8th Ave		Madison	WI	53719	6/17/1967 0:00	rfbat@centu	608-356-3320	
5	Delaney	Deane and Colleen	100 Camp St		Cross Plains	WI	5362	10/11/2014 0:00		608-386-5496	

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:

Mr. Richard Ahles (290193) Env#: 957

Family Details Member Details (2)

Family Information Notes

Church of Registration: Good Shepherd Parish, Toledo
 Details Modified On: Friday, May 19, 2017 1:11 PM
 Family Group: Active
 Registration Status:
 Registration Date: 7/1/1991
 Unregistered Date:

Last Name: Ahles
 First Name(s): Richard
 Formal Mailing Name: Mr. Richard Ahles
 Informal Name: Mr. Ahles
 Formal Salutation: Mr. Richard T. Ahles
 Informal Salutation: Richard Ahles
 Email Address: Ahles@demoemailaddress.com
 Primary Phone: 555-2222
 Emergency Phone: 555-3333
 Emer. Ph. Desc.:

Primary Address: Home Address
 Home Mailing Other
 Country: United States
 Postal Code: 48108
 Address Line 1: 5141 Corey Rd
 Address Line 2:
 City: Ann Arbor
 State/Region: Michigan
 Phone Number: 555-2222

Envelope #: 957 Next
 Diocesan ID: 14824600
 Annual Gift \$: 0 Giving History
 Map Code: B

Send Mail: Publish Address:
 Send Contrib. Env.: Publish Photo for Pictorial Directory:
 Publish Phone: Send Magazine:
 Publish Email:

Edit Details Close

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.**