

**BLACKBAUD
ONLINE USER CLINICS**

Log on, Listen, and Learn

The Financial Edge Online User Clinics: Query

March 17, 2010



Host: James Bradley, Solutions Engineer

Agenda

- Welcome and Introductions
- Blackbaud News and Updates
- Support Resources
- Query Presentation
- How Blackbaud Can Help
- Q&A



Training is Everything: Blackbaud Learn

- Blackbaud Learn is our commitment to your ongoing skill development and job knowledge — training that gives you and your staff the tools to be successful.
- Benefits of Blackbaud Learn:
 - A constantly evolving and fresh curriculum to keep every staff member engaged in active, lifelong learning
 - Role-based curriculum for specific skill sets
 - No travel costs or hassle for 100% of classes
 - Self-paced and on-demand classes available 24/7
 - Thought leadership sessions for nonprofit strategy and best practices
 - Exclusive Q&A sessions with experts each month
 - Monthly training newsletter with notification of new classes and tips and tricks



Blackbaud Learn for RE, FE, and Internet

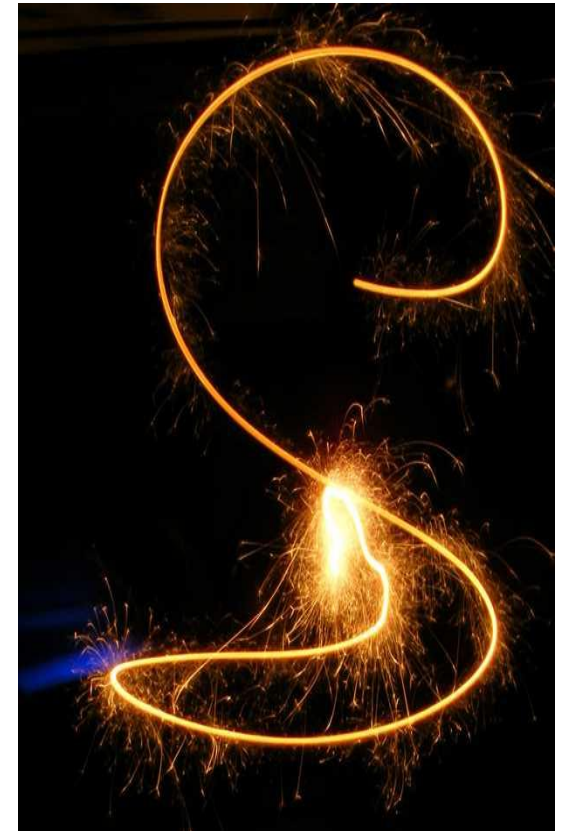
- Blackbaud Learn is now available for Internet Solutions, including Blackbaud NetCommunity and Sphere.
- Classes are delivered online and include:
 - Blackbaud NetCommunity
 - Introduction to Blackbaud NetCommunity
 - Managing Events Online
 - Communicating with Constituents Online
 - Targeting Website Content
 - Sphere
 - Friends Asking Friends
 - Content Management System
 - Communicating Online
 - Advanced Constituent Management

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- Blackbaud Application Hosting offers you a convenient, affordable alternative to setting up and managing Blackbaud applications on your own.
- Blackbaud Application Hosting provides:
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- **Get Hosted: Save Time & Money by Hosting Your Blackbaud Applications**
 - 3/24/10 at 1:00 p.m. ET
 - 3/30/10 at 2:00 p.m. ET

Blackbaud NetCommunity Spark™

- Blackbaud NetCommunity Spark is a new online marketing and membership solution that ignites your website!
- Spark seamlessly integrates with The Raiser's Edge
- Bring your website to life with:
 - Unmatched online membership and fundraising tools
 - Email marketing to help drive new & renewing support
 - Online event management and registrations
- Join us for a free web seminar: Ignite Your Website with Blackbaud NetCommunity Spark
 - 3/30/10 at 1:00 p.m. ET
 - 4/15/10 at 1:00 p.m. ET
 - 4/27/10 at 1:00 p.m. ET



Upcoming Web Seminars

- Advanced Budget Management
 - 3/30/10 at 2:00 p.m. ET
 - 4/27/10 at 2:00 p.m. ET

- F9 for The Financial Edge
 - Insert date from website
 - Insert date from website

- Take Invoice & Purchase Requests Online: WebPortal for The Financial Edge
 - Insert date from website
 - Insert date from website

- For a schedule of all upcoming web seminars or to register, go to www.blackbaud.com/webinars.

Today's Topic

- Query in The Financial Edge

What is Query?

- Query creates a group of records
- Queries are available in the standard reports as a filter
- Queries can be used in the Visual Organizer as a tool to group accounts
- Queries are data output in Pivot Reports
- Queries are used in Exporting records
- Query + Attributes = Powerful report combination

Why use Query?

- Understanding Query is fundamental to using The Financial Edge to its fullest potential.
- By using Query you can enhance the filtering tools in Reports, Visual Chart Templates and Searches.
- Query results can be used as Dashboard Reports.

Nuts and Bolts of Query

Two considerations must be made for each Query in The Financial Edge.

1. Query Type

Query type determines which types of records and what fields are available to use in the Query.

For example: if you chose a project type Query, you will be able to filter on any field in the project record such as: project type, start date/end date, project ID, etc...

2. Query Format

Format determines how the Query is saved and what information will be included each time the Query is run.

There are two formats of Queries in The Financial Edge:
Static and Dynamic.

Nuts and Bolts of Query Con't

Query Formats continued:

- Static Query:** Contains the same results each time you run it.
Static Queries are a snapshot of the details in your database at any given time. In other words it freezes the data and it remains unchanged unless you choose to refresh the basis for the Query.
- Dynamic Query:** Automatically refreshes each time the Query is used.
When using a dynamic query, the program searches the database for any new records that match the criteria being asked.
It will also remove any records that no longer match.

Analyze Your Needs

Before creating a Query, you can ask yourself some questions to help design the Query.

You can use these basic questions to help you build any Query:

What records do I want to see? What format do I need the grouping?

These two questions are essential to deciding which record contains the information you are looking for and how you would like it refreshed each time it is used.

We answer these two questions when we choose the **Query Type** and **Format**.

What do the records I'm looking for have in common?

To find the commonality of records we search on fields in the **Criteria Tab** of the Query.

Analyze Your Needs Con't

You can use these basic questions to help you build any Query con't:

What would I like to see about these records?

On the **Output Tab** of the Query, you can choose what information you would like displayed.

What order would I like the results of the Query to be displayed?

The order of the results can be determined by using the **Sort Tab**.

- * By being able to answer these questions ahead of time you should be able to quickly create the Query.

Combining Operators

Another function in Query really brings out the power of filtering on records in your Financial Edge database, **Combining Operators**.

With Combining Operators, you can narrow your Query by combining separate sets of criteria to make one. They are similar to operators in mathematical equations.

Combining Operators in The Financial Edge are:

AND – By using the And operator you are saying the records must meet both criteria

OR – The Or operator says the record can meet either criteria

Parentheses – Groups multiple criteria to be considered as a whole, works just like parentheses in algebra.

Combining Operators con't

Examples of Combining Operators in action:

AND (must meet both)

Account equals 01-5100-01 AND transaction date equals this period.

OR (either or)

Account equals 01-5100-01 OR transaction date equals this period.

Parentheses (groups criteria together)

(Account equals 01-5100-01 OR transaction date equals this period) AND transaction amount is less than \$1000.

Other Uses for Queries:

- You can use the results tab to print out for reference.
- You can email the results to others.
- You can export the results to manipulate the data using excel.

Let's Create a Query!

Questions?



Support Options – How Blackbaud Can Help

Email resupport@blackbaud.com or call 800.468.8996 for assistance.

- Additional modules: multiple module purchases and bundled training
- Training Services: Blackbaud Learn
- Consulting Services: Conversion and Consulting Services
- Blackbaud Application Hosting: hosting services for Blackbaud solutions
- Data Enrichment Services: identify, rate, and qualify your best prospects
- For more information please contact your account manager

More Online User Clinics for The Financial Edge

- Homepage and Dashboards – April 28
- Enhancing Your Purchasing Process – June 9
- Troubleshooting The Raiser's Edge and The Financial Edge Integration – July 21
- Reconciliation – September 1
- Year-End Procedures – October 13
- Preparing Your 1099s – November 17
- Reporting – December 15

Questions?

For more information:

Contact your account manager

Phone: 800.443.9441

Email: solutions@blackbaud.com

Thank you for joining us!