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Query Scheduling Concepts

[Overview of the Query/Output Process](#)

[Overview of the Scheduling Process](#)

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Overview of the Query/Output Process

In order to generate an output (file, report, or use an update procedure) you must have a query that selects the records. The specific outputs that you designate are run against the records selected by the query. In order to bring the query and output(s) together you must use the [Query and Output Schedule screen](#) or the [Query Request](#) operation.

Example

You can create a query to identify the transactions that should receive an acknowledgment (indicated in TA by a blank acknowledgment date on the transaction record). You can then create a user-defined output that includes all of the information from the database that you need to create your acknowledgment letters (e.g., name, address, gift date, and gift amount).

The process includes specifying that you want the acknowledgment query to run with the following outputs:

- The user-defined output file that you define;
- The Set Acknowledgment Date update procedure (which sets the acknowledgment date on the transactions pulled by the query so they are not acknowledged again);
- The Create Interactions update procedure (which creates interaction records to represent acknowledgement letters or any other mail that you sent to the donor); and
- A statistics report (to gather statistics about the distribution of the transactions being acknowledged).

See Also:

[What is a Query?](#)

[What is an Output?](#)

What is a Query?

In TA, a query is a "question" you ask the database to find a set of records. The question you ask is composed of a set of criteria. TA compares the records stored in TA to the criteria you set up and selects only those records that meet the criteria.

For example, you can set up an acknowledgment query to select all of the annual gifts made by donors at the annual, mid-level current activity that need to be acknowledged.

See the [Understanding Queries chapter](#) for more information about Queries. See the Writing Queries: Samples and Guidelines chapter for a description of the standard queries delivered with TA.

After you create a query, you can put it together with one or more outputs.

What is an Output?

TA contains several categories of outputs.

User-defined Outputs

You create a user-defined output in order to identify the information you want from the records selected by a query, e.g., fields such as the salutation and address to include in a solicitation.

Reports

You can select one or more of the customizable reports that are delivered with TA to help you analyze your data.

Update Procedures

You can select one or more of the update procedures that are delivered with TA to enable you to make changes to a group of records in your database.

Custom Outputs

TSI can create a custom output for a client to output information that cannot be output directly through a user-defined output.

Each of these outputs is used for a different purpose. See the Understanding Outputs chapter for more information on creating a user-defined output. See the Understanding Update Procedures chapter for more information on each update procedure. See the reports chapters of the User's Guide for information on running a report. Each report is documented in the appropriate report chapter (e.g., the Account Profile report is documented in the Account Reports chapter).

Overview of the Scheduling Process

The scheduling process comes after both the query and the user-defined output have been created. In the scheduling process, you determine whether you want outputs to run with the query at the same time, or whether you want to modify the records retrieved by the query first and then run the outputs. You can run a query with one or more outputs.

- You can run the query first, modify the records retrieved by the query, then run outputs with the saved records, or
- You can run the query with outputs at the same time.

Separating the query from the output provides you with greater flexibility since you can re-use the query over and over and run different outputs against the record set.

You can use the [Query Request](#) operation if all you want is file to be run against a specific query. You do not have as many options available when you generate a file using this operation.

See Also:

[Identifying Queries and Outputs You Can Schedule Together](#)

[Query and Output Privileges](#)

Identifying Queries and Outputs You Can Schedule Together

When TA runs a query, it pulls all of the records of the type you specify into a kind of holding space. The output then has access to the information pulled by the query. Because an output cannot access information that is not pulled by the query, the output type cannot be more detailed than the query type. For example, a benefits-level output cannot be run with an accounts-level query, because the benefit-level information isn't being pulled by that query. You do not have to worry about scheduling queries and outputs of the wrong type; TA does not let you schedule an output more detailed than the query.

Queries and outputs are created to work with a particular type of information. Both queries and outputs use the same seven types.

Query type	Information pulled	Output types you can run
Accounts	Account-level information	<ul style="list-style-type: none"> • Accounts • Addresses

Query type	Information pulled	Output types you can run
Names	Name-level information (which also gives you access to account-level information)	<ul style="list-style-type: none"> • Accounts • Names • Addresses
Addresses	Address-level information (which also gives you access to account-level and name level information)	<ul style="list-style-type: none"> • Accounts • Names • Addresses
Transactions	Transaction-level information (which also gives you access to name-level and account-level information)	<ul style="list-style-type: none"> • Accounts • Names • Addresses • Transactions
Benefits	Benefit-level information (which also gives you access to transaction-level, name-level, and account-level information)	<ul style="list-style-type: none"> • Accounts • Names • Addresses • Transactions • Benefits
Interactions	Interaction-level information (which also gives you access to name-level and account-level information)	<ul style="list-style-type: none"> • Accounts • Names • Addresses • Interactions
Sources	Source code information	<ul style="list-style-type: none"> • Sources
Tributes	Tribute-level information (which also gives you access to name-level and account-level information)	<ul style="list-style-type: none"> • Accounts • Addresses • Tributes
Planned Giving	Planned gift records	<ul style="list-style-type: none"> • Accounts • Addresses • Planned Giving

See Also:

[Examples \(Scheduling Queries and Outputs Together\)](#)

[List of Standard TA Queries and Outputs that Go Together](#)

Examples (Scheduling Queries and Outputs Together)

Suppose Peter Clark gave three \$1500 gifts to your organization during the current year.

If you want TA to produce an output file that contains *account information* (e.g., the account's giving level and current activity), you can run an *account-level query* to find *each account* that gave over \$1000 during the current year. You can run this query with an *account-level user-defined output* to get the following:

- The query returns one record for Peter Clark's account, and
- The output file contains Peter Clark's giving level and current activity.

If you want TA to produce an output file that contains *gift information* (e.g., the pledge amount and payment method for each of Peter Clark's gifts), you can run a *transaction-level query* to find each gift over \$1000 received during the current year. You can run this query with a *transaction-level user-defined output* to get the following:

- The query returns three records for Peter Clark's account, and
- The output file contains three records that list the pledge amount and payment method for each of Peter Clark's gifts.

Note: If you were to run the same transaction-level query with an account-level user-defined output to look at the account's giving level and current activity, the output file would contain three records for Peter Clark's account (each containing the giving level and current activity related to the account activity to which the particular gift is tied).

List of Standard TA Queries and Outputs that Go Together

The following table lists each standard TA query and the output(s) to run with that query. These outputs include user-defined outputs and update procedures.

You can copy these queries to create those specific to your organization's business practices. See the [Understanding Queries chapter](#) for more information about copying queries.

You can schedule each query to run with an output using the Query and Output Schedule screen.

Note: Depending on your organization's policy, you may schedule the Create Interaction update procedure with virtually all of these queries.

Query	Outputs
TA ACK A	TA ACK LETTER Update Acknowledgement Create Interaction
TA CLUB	TA CLUB LETTER Update Benefit Sent
TA CS Response	TA CS LETTER Create Interaction Update Response

Query	Outputs
TA CS No Response	Run this query with the Update Response procedure prior to the TA CS Response query. The TA CS No Response query selects those customer service interactions to which no response is required and the Update Response procedure sets the response date so that interaction is not pulled for the TA CS Response query.
TA Exchange List	TA EXCHANGE TAPE Update Exchange Date
TA Guide	TA GUIDE TAPE Update Benefit Sent Set Cur Start Date (If multiple pulls for one month's guide, determine after which one Set Cur Start Date should be run)
TA Guide 1C	TA GUIDE TAPE Update Benefit Sent Set Cur Start Date (If multiple pulls for one month's guide, determine after which one Set Cur Start Date should be run)
TA Install CC	TA INSTALL BILL Set Reminder Sent Date
TA Installment Bill	TA INSTALL BILL Set Reminder Sent Date
TA MEMBERCARD	TA MEMBERCARD Update Benefit Sent
TA Pledge Bill 1	TA PLEDGE BILL Update Pledge Bill
TA Pledge Bill 2	TA PLEDGE BILL Update Pledge Bill
TA Premium	TA PREMIUM LABEL Update Benefit Sent

Query	Outputs
TA Source - any solicitation	TA ADDGIFT LETTER for additional gift solicitations TA LAPSED LETTER for lapsed gift solicitations TA RENEWAL (giver) for renewal gift solicitations TA RENEWAL RECIP for renewal gift solicitations Mailing labels (if not using window envelopes or performing a merge with a word processor which will create the labels) Create Interaction
Invitation Query	Create Interaction
Credit Card Rejection Letter Query	Update Credit Card Rejection Notice Date
Adjustment Notice Query	Update Adjustment Notice
Classification Create Query	Create Classification
Accounts for a Project Query	Create Prospect

Query and Output Privileges

You can schedule only the [queries and user-defined outputs that you "own"](#) or that were created by the PADMIN user. Otherwise, you can copy other users' public queries and user-defined outputs and schedule those.

Note: If the query and user-defined output(s) you want to schedule are assigned user groups, you can only schedule them if you are a member of the user group assigned to each. The query and user-defined outputs do not have to belong to the same user group; both must be in user groups of which you are a member.

See the [Understanding Queries chapter](#) for more information about copying queries. See the [Understanding Outputs chapter](#) for more information about copying user-defined outputs.

Status of the QOS Record

Each QOS record has a status, which TA displays in the upper right corner of the Query and Output Schedule screen. See the table below for a description of each status.

Status	Description
Pending	TA sets the QOS record to "P" for pending when you create the QOS record. The status must be "P" in order for you to submit the QOS record to run.

Status	Description
Running	TA sets the status to "R" for running when the QOS record has been submitted for processing.
Finished	TA sets the status to "F" for finished when the QOS record has run successfully.
Inactive	TA sets the status to "I" for inactive when any of the parameters on a parameterized query being scheduled are left blank. TA sets the status back to "P" for pending when you set all of the parameters. See the Understanding Queries chapter for more information about parameterized queries.
Errors	TA sets the status to "E" for errors if the QOS record runs in error. See " Viewing the Errors if a QOS Record Runs in Error ".
Delete	You can set the status of the QOS record to "D" for delete if the record should be deleted when your organization runs delete processing.

Note: Each output on the QOS record also has a status, which TA displays in the Status column of the Outputs block. All of the above statuses apply to scheduled outputs, except for "D" for delete.

System Preferences (Query Scheduling)

The following table lists each system preference that affects query scheduling. See [Index of System Preferences](#) for more information about each system preference.

System Preference	See
Days Until Queried Records Expire	Indicating If TA Should Save the Records Retrieved By the Query
Append/Replace/Create	File Output Options Window
Default Line Padding?	Indicating if Line Padding Should be Enabled

Using Query Request

Use this operation when all you need is to generate a file against a particular query. This is simplified way to schedule and run a query with an output. Many settings that are available on the Query and Output Schedule screen (or the Schedule Administration screen) are not available when you use this operation:

- The query is always run directly to a temporary output table, not saved to Query Retrieved.
- Parameterized queries cannot be used.

- The effective date is always the date the query is run.
- Column headers are always included in the output file.
- All records which meet the query criteria are selected (that is there is no "maximum to select" option)
- If a query source code is referenced in the output, then the source code on the query record is used.
- Ask amount rules fields cannot be used by the output (they will output blank)
- A new output file is always be created. You cannot append to existing record.
- Only the seasonally correct or preferred address is available for outputting.
- Invalid addresses cannot be optionally included in the output
- Only the default salutation is available for outputting.
- Line padding is not enabled (this entails some performance cost)

Parameter	Description
Query Name <i>required</i>	Press [F9] to select the queries that you have permission to run.
Output Name <i>required</i>	Press [F9] to select the user defined output file for which you have permission to generate and which are of a compatible output type with the query you selected in the above parameter. You can only select one file for this parameter.
Output File Name	This parameter determines the file name (with path) of your output file. If the default value is left as a path, the file name "output.txt" will be used.

Query Scheduling Step-by-step

[Finding a Scheduled Query](#)

[Scheduling a Query](#)

[Setting the Processing Details for a Scheduled Query](#)

[Working with Outputs on a QOS Record](#)

[Adding a Note to a QOS Record](#)

[Setting the Parameters for a Parameterized Query](#)

[Running a Query](#)

[Rescheduling a Query/Output](#)

[Removing a Query From the Schedule](#)

[Working with Query Retrieved Records](#)

[Reviewing the Query, Output, or History for a QOS Record](#)

Finding a Scheduled Query

After you have scheduled a query to run, you may want to access the QOS record to view the outputs scheduled to run with the query or make some change to the scheduled record. To find one or more QOS records, complete the following steps.

1. Access the Query and Output Schedule screen.
 - If you were not working on this screen previously, TA displays the Schedule New Query/Output window from which you should click <Find>.
 - If you have a QOS record on screen, click <Find> on the toolbar.
2. Enter the search criteria on the Find Query/Output window.

Note: The QOS record(s) must meet all of the criteria you specify in the Find Query/Output window, so set only those fields that you want to use to limit the records TA selects. You can press the [F9] key for a list of values in all of the fields except the Schedule Date field.
3. Click <Find>. TA displays the Query and Output Schedule screen with the first QOS record of the set of records you selected. You can access a different record by highlighting it in the List Block.

See Also:

[Search Criteria on the Find Query/Output Window](#)

Search Criteria on the Find Query/Output Window

Field	Option
Query	<p>You can enter the query name to find the QOS record(s) based on the query.</p> <p>Note: You can also use the percent sign ("%") as a wildcard character in the query name to find a set of queries. For example, you can enter "TA ACK%" to find all scheduled standard TA acknowledgment queries. The percent sign represents all characters following those you enter for the query name.</p>
Description	<p>You can enter the description of the QOS record to find the QOS record(s) based on the query/output schedule description.</p> <p>Note: You can also use the percent sign ("%") as a wildcard character in the description to find a set of QOS records. For example, you can enter "%prospect" to find all of the prospect QOS records. The percent sign represents all characters preceding those you enter for the description.</p>

Field	Option
Date Scheduled	You can enter a date using the MM/DD/YY format to find the QOS record(s) based on the date it is scheduled to run.
Status	You can enter the status to find the QOS record(s) based on the status of the QOS record.
Group Name	You can enter a group name to find the QOS record(s) based on the group to which it belongs. See " Identifying a QOS Record as Part of a Group ". Note: You can also use the percent sign ("%") as a wildcard character in the group name to find a set of QOS records. For example, you can enter "%renewal" to find all of the QOS records in the renewal groups. The percent sign represents all characters preceding those you enter for the description.
Output	You can enter the output name to find the QOS record(s) based on the output.
Requested By	You can enter a brief name to find the QOS record(s) based on the user who requested the QOS record.

Scheduling a Query

You must schedule a query by creating query/output schedule (QOS) record before TA can run the query and any of its associated outputs. The QOS record contains information about the query being scheduled, additional information about any outputs being scheduled with the query, and information about the schedule itself.

When you create a QOS record, you can indicate whether it belongs to a group of QOS records that TA can run together, often on a recurring frequency (e.g., "Monthly Renewals"). Groups are useful in that they allow multiple QOS records to be rescheduled or added to nightly Query and Output processing in one step.

To create a QOS record, complete the following steps.

Note: You cannot change the query name or scheduled date once the QOS record has been created, so use caution when completing these fields (i.e., to change the query name or scheduled date you must mark the record for deletion and start over).

1. Access the Query and Output Schedule screen.
 - If you were not working on this screen previously, TA displays the Schedule New Query/Output window.
 - If you have a QOS record on screen, click <New> on the toolbar. (Make sure your cursor is not in the Output block when you click <New>.) TA displays the Schedule New Query/Output window

2. Enter the name of the query in the Query field. You can press the [F9] key to select from a list of queries. TA sets the description in the Description field.
Note: You can update the description to more clearly identify the QOS record.
3. The Date field defaults to the current date. However, you can enter a different schedule date, using the MM/DD/YY format. This date indicates when the QOS record should run.
4. If you *do not* want to identify the QOS record as part of a group, leave the Group Name field blank. If you *do* want to identify the QOS record as part of a group, enter the group name in the Group Name field. You can press the [F9] key to select from a list of group names. See "[Identifying a QOS Record as Part of a Group](#)" for more details about working with a group.
5. Your user name defaults in the Requested By field. However, you can enter a different brief name to associate this QOS record with a different user. You can press the [F9] key to select from a list of brief names.
6. Enter the name of the output to schedule with the query, if desired. You can press the [F9] key to select from a list of outputs.
Note: You can add outputs at a later stage in the scheduling process. You can schedule a query to run with user-defined outputs that are assigned a different user group than the query, as long as you are a member of all user groups involved. See [Query and Output Privileges](#).
7. You can mark the Create Interactions checkbox if you want TA to schedule the Create Interactions update procedure to run with the query. TA marks the Create Interactions checkbox for Source queries that were created when the source code was created.
8. Click <Create>. TA displays the Query and Output Schedule screen, where you can set the remaining fields associated with the QOS record. The name of the query being scheduled appears at the top of the screen, along with the scheduled date and sequence number (i.e., the number assigned to distinguish each QOS record for a particular query on the same date).
Note: If you are creating a QOS record for a parameterized query, TA displays the Run Time Parameters window to enable you to set the values for the parameterized fields. See "[Setting the Parameters for a Parameterized Query](#)". See the [Understanding Queries chapter](#) for more information about parameterized queries.

Setting the Processing Details for a Scheduled Query

The processing details for a QOS record fall into the following seven categories.

- Specifying whether you are running the query or using previously retrieved records
- Indicating if TA should save the records retrieved by the query
- Specifying the effective date of the query and the maximum number of records to retrieve
- Indicating when a QOS record will run
- Changing the description of a QOS record
- Linking the query and output(s) to a source code and ask amount rules
- Indicating if line padding should be enabled
- Identifying a QOS record as part of a group

See Also:

- [Running the Query or Using Previously Retrieved Records](#)
- [Indicating If TA Should Save the Records Retrieved By the Query](#)
- [Specifying the Effective Date and Number of Records to Retrieve](#)

[Indicating When a QOS Record Will Run](#)

[Changing the Description of a QOS Record](#)

[Linking the Query and Output\(s\) to a Source Code and Ask Amount Rules](#)

[Indicating if Line Padding Should be Enabled](#)

[Identifying a QOS Record as Part of a Group](#)

Running the Query or Using Previously Retrieved Records

When you schedule a QOS record, you must specify if you are scheduling the query to run, or if you are using the records previously retrieved by the query and stored in the Query Retrieved table. TA defaults the Run Query field to "Y" for yes to indicate that the query should run; however, you can enter "N" for no to use the records stored in the Query Retrieved table.

If there are no previously retrieved records for the query in the Query Retrieved table or if you want to replace those records with a new set, you should be sure to run the query. If you have modified the list of retrieved records in the Query Retrieved table and want to use the modified records, you should set the Run Query field to "N" for no. You might also want to use previously retrieved records if you are mailing a follow-up letter to a group of donors that you previously contacted when you want to make sure you mail to the exact same group of donors.

Indicating If TA Should Save the Records Retrieved By the Query

If you set the QOS record to run the query, you must indicate whether the records pulled by the query should be saved in the Query Retrieved table. You set this information in the Save Records field. TA defaults this field to "N" for no.

- "R" indicates that you want to replace the existing records in the Query Retrieved table (i.e., you want to save the records).
- "A" indicates that you want to append the records to the existing records in the Query Retrieved table (i.e., you want to combine these records with the other records retrieved by this query).
- "N" indicates that you do not want to save the records to the Query Retrieved table.

Note: If you replace or append records, TA saves them to the Query Retrieved table for the length of time specified by the expiration date set on the query, which may be set by the Days Until Queried Records Expire system preference. See the [Understanding Queries chapter](#) for more information about the expiration date of query retrieved records.

Specifying the Effective Date and Number of Records to Retrieve

Specifying the Effective Date

If you set the QOS record to run the query, you can set the effective date of the query. The effective date indicates the expected date when the results from the query are to be used. You can enter the future date that you expect the records will be used, or you can leave the field blank for TA to use the date the query is run as the effective date. If you enter a date into this field, enter the date in MM/DD/YY format where "MM" is the month, "DD" is the day, and "YY" is the year.

Note: If an effective date was set on the query when it was created, TA uses that date unless you enter a different date here.

TA uses the effective date for two types of query processing.

- Selecting the correct address for a query assigned the Accounts, Names, Benefits, or Transactions query type.
- Calculating the value for the Effective Date selection criterion or other calculated fields that are based on that date.

For example, you may want to run a query in May with the intention of modifying the retrieved records and sending invitations to the donors in the middle of June. If you enter an effective date that is in the middle of June, TA selects the correct addresses that should be used when the invitations are sent (e.g., summer vacation addresses).

If you have set the query to run on a frequency (see "[Indicating When a QOS Record Will Run](#)"), you can also set the effective date for the records that will be rescheduled. TA includes the following fields in the Rescheduled Effective Date Options block.

Field	Description
Old Effective Date	The effective date of the original QOS record.
New Schedule Date	The schedule date of the new QOS record.
Other Date	The date that you indicate in the text box that appears to the right of this field. Enter the date in MM/DD/YY format.
No Effective Date	The QOS record does not use an effective date.

Specifying the Number of Records to Retrieve

You can specify the maximum number of records that the query should retrieve by setting the Maximum Number field. Leave this field blank if you want to retrieve all of the records that meet the query criteria.

Examples of when you would want to put a number in this field include testing that the query is pulling the right records, or pulling the first 1,000 records to test a solicitation piece (e.g., soliciting the first 1,000 accounts with a particular piece and then rerunning the query for the remaining accounts while excluding the first 1,000 accounts)

Note: If you enter a number (e.g., 1000) in this field, TA saves the *first* 1,000 records it retrieves to the Query Retrieved table.

Indicating When a QOS Record Will Run

When you create a QOS record, you indicate its scheduled date. TA uses the scheduled date when determining which records to run during nightly Query and Output processing. Given that you want to be careful not to cause delays in regular processing, you will run most queries through nightly processing. (See the System Administration chapter for more information about adding items to the nightly schedule.)

However, you can run a query during the day to immediately find the records that you need. You can also set TA to automatically reschedule a QOS record on a regular frequency.

To set information about when a QOS record should run, you can set the following fields.

Field	Description
Priority	Indicates the priority of the QOS record, if TA has more than one task scheduled to run at the same time. TA defaults the priority to 10; however, you can enter a number from 1-100 in this field, where 1 is the highest priority. As records with a high priority number can cause delays in other processing in TA, follow your organization's policy regarding priority number.

Field	Description
Frequency	Indicates if the QOS record is set to run on a recurring frequency, and specifies the schedule for that frequency (e.g., daily, monthly, quarterly). If a frequency is set, TA automatically reschedules the QOS record at the selected frequency. You can press the [F9] key to select from a list of frequencies. If you set the frequency, you can set the effective date for the records that will be rescheduled.
	Note: You can view the next recurrence of the QOS record on the Query and Output Schedule screen once TA has created it.

Changing the Description of a QOS Record

The query description defaults to the description that was set when the query was created. As you may schedule the same query several times (e.g., with parameterized queries), you can change the description on each QOS record to clarify the purpose of each QOS record (e.g., to help you find a particular QOS record). To change the description, click in the Query Description field and enter the description of the particular QOS record.

For example, your organization sets up a standard renewal query that you schedule each month to select a different set of donors based on expiration date. When you run this query for the first renewal effort in August, you could change the description of the QOS record from "Renewal Effort 1" to "Aug99 Renewal Effort 1."

Linking the Query and Output(s) to a Source Code and Ask Amount Rules

When you schedule a query, you can specify the source code and ask amount rules to be used by the query and outputs.

Field	Description
-------	-------------

Field	Description
Source Code	<p data-bbox="568 262 1185 357">Indicates the solicitation associated with the query and output(s). The source code affects the following outputs.</p> <ul data-bbox="568 388 1185 703" style="list-style-type: none"> <li data-bbox="568 388 1185 514">• The Create Interactions update procedure (See the Update Procedures chapter for more information about the source code's relationship to this update procedure.) <li data-bbox="568 546 1185 703">• The user-defined output (i.e., the source code on the QOS record determines which source code should be printed on a reply device if the QUERY SOURCE calculated field is included in the output) <p data-bbox="568 724 1185 1039">If a source code was associated with the query when the query was created, TA sets it here. If this information wasn't set when the query was created, you can add it here. You can also change this information if it is incorrect. (The source code that you set on the QOS record overrides the source code that was set on the Query Entry screen.) You can enter the beginning of the source code and press the [F9] key to select from a list of source codes.</p> <p data-bbox="568 1060 1185 1134">TA displays the description of the source code to the right of the Source Code field.</p>
Ask Amount Rules	<p data-bbox="568 1155 1185 1312">Indicates the rules TA uses to calculate the ask amounts for each account that the query pulls when the query is run. The ask amounts are used in the solicitation piece if they are included in the user-defined output.</p> <p data-bbox="568 1333 1185 1627">If an ask amount rule was associated with the query when it was created, TA sets it here. If this information wasn't set when the query was created, you can add it here. You can also change this information if it is incorrect. (The ask amount rule that you set on the QOS record overrides the ask amount rule that was set on the Query Entry screen.) You can press the [F9] key to select from a list of ask amount rules.</p> <p data-bbox="568 1648 1185 1772">TA displays the description of the ask amount rule to the right of the Ask Amount Rules field. See the Understanding Queries chapter for more information about ask amount rules.</p>

Indicating if Line Padding Should be Enabled

The Enable Line Padding? checkbox on the Query and Output Schedule screen controls whether line padding is enabled for a query/output schedule record. This field has no effect if output files are not being generated.

Mark this checkbox for TA to run the schedule record with line padding. If you want TA to run the query/output schedule record without line padding, make sure the Enable Line Padding? checkbox is unmarked. (If you do not know whether you have enough temporary table space, or if you do not need to speed up output processing, you probably should not use line padding.)

Line padding involves reserving space for output information at the start of the record building process. Enabling line padding speeds up the creation of output files, but it uses more temporary table space. If you run out of temporary table space, the query/output schedule record will end in error. If you do not enable line padding, Oracle creates the shortest possible record, which is later added to. This process takes longer to create the file but uses less temporary table space.

TA defaults the Enable Line Padding? checkbox based on how your organization set the Default Line Padding? system preference.

Identifying a QOS Record as Part of a Group

When you schedule a query, you can set the Group Name field to indicate that the QOS record belongs to a "set" of QOS records (i.e., to identify the QOS record as part of a group of QOS records that TA runs together). For example, if hundreds of renewal queries must be scheduled at the end of each month, they can be grouped together as the "Monthly Renewals" group and scheduled in one step.

If you did not identify the QOS record as part of a group when the QOS record was created, you can do so on the Query and Output Schedule screen by setting the Group Name field. You can press the [F9] key to select from a list of groups. TA displays the description of the group below the Group Name field.

Before you can schedule a group of queries, you must first run each of the individual queries in this group (the group name must be specified on each query). Once you have run all of the queries in the group and they have a status of "F" for finished, you can reschedule the whole group of queries on the Reschedule Query and Output Schedules screen.

Creating a New Group Name

If the group you want to use does not appear in the list of groups, you can create a new group on the Group Name Code Entry screen, which is accessible in the Codes module. When you create a group name code, you enter a description of the group and set the group type to "Q" for query.

Related Topic:

[Rescheduling a Group of Queries/Outputs](#)

Working with Outputs on a QOS Record

The Outputs block includes every output that is scheduled with the query. See "[What is an Output?](#)".

Adding an Output

You can add an output from the QOS record. To add an output, follow the steps below.

1. Move your cursor to a blank line in the Output block.
2. Enter the output name. You can press the [F9] key to select from a list of outputs.

Note: TA may automatically add an output to your QOS record because it is linked to an output that you schedule. You can treat a linked output on the QOS record in the same way as any other output. See the Understanding Outputs chapter for more information about linked outputs.

Deleting an Output

You can delete an output from the QOS record (e.g., to remove an output that was added in error). To delete an output, highlight the output in the Output block and press [Shift] [F6].

Inactivating an Output

You can inactivate an output from the QOS record (e.g., to run the query alone on a particular occasion). To inactivate an output, highlight the output in the Output block and set the Status field to "I" for inactive.

Note: If you reschedule a QOS record that contains inactive outputs, TA activates them on the new QOS record.

See Also:

[Setting Up a User-defined Output](#)

[Setting the Parameters for an Update Procedure or Report](#)

Setting Up a User-defined Output

When you schedule a user-defined output to run with a query, information about the output defaults to the QOS record; however, you can add or change options for the user-defined output on the QOS record (e.g., the order in which information is sorted on the output file). Any changes you make here will override the options set on the User-defined Output Entry screen for this QOS record.

For example, you might schedule a user-defined output to pull the names, addresses, and most recent gift amounts into a file for each of the accounts selected by an acknowledgment query. You can access the options for the output file through the QOS record in order to view, and possibly change, the order in which information is sorted on the output file. You can also change options associated with an output table.

To view and update the file or table output options, follow the steps below.

1. Highlight the user-defined output in the Output block. (The category is "User-defined.")
2. Click the <Zoom> button to the left of the output name. This takes you to either the File Output Options window or the Table Output Options window, depending on whether the output is using a file or table format.
3. Set the fields on the File Output Options or Table Output Options window to indicate how you want TA to process the user-defined output. (See the list of fields in the sections that follow.)
4. Click <Close> to return to the Query and Output Schedule screen.

See Also:

[File Output Options Window](#)

[Table Output Options Window](#)

File Output Options Window

Output Name

TA displays the name of the scheduled output at the top of the File Output Options window. You cannot change this information.

File Name

The file name indicates the path and name of the output file as it will be saved on the database server. TA creates an output directory for each user to store the output files that the user creates; this directory defaults based on the user identified in the Requested By field on the Schedule New Query/Output window (i.e., the user identified when the QOS record was created).

File Options

The file options indicate how the output file will be saved. The file options include the following:

- "C" for "Create new output file, saving old one."
- "R" for "Replace existing output file."

- "A" for "Append output data to existing output file."

TA defaults the file options based on how your organization set the [Append/Replace/Create New Output File](#) system preference; however, you can enter a different file option. Press the [F9] key for a list of file options. See the Setting Up System Preferences chapter for an explanation of the Append/Replace/Create New Output File system preference.

Date Format

The date format indicates the format in which dates should be printed on the output file, e.g., "S" for standard date format. (See the Understanding Outputs chapter for more information about date formats.) TA sets the date format to the format set on the User-defined Output Entry screen; however, you can enter a different date format. You can press the [F9] key for a list of date formats.

Preferred Address

The preferred address indicates the preferred type of address to use for this output (e.g., "P" for premium). TA uses a series of address selection rules to determine the address record from which to pull address information. Setting the preferred address indicates that addresses of this type are preferred for use in the output file if the account has an address of the specified type. You can press the [F9] key for a list of address types.

Note: If you set a preferred address type here, TA overrides any preferred address information set on the query for this QOS record.

Preferred E-mail

The preferred e-mail indicates the preferred type of e-mail address to use for this output.

Preferred Telephone

This field is in development for a future release of TA.

Sort Code

The sort code indicates how the records in the output file should be sorted, e.g., "ZIP, Alpha" for alphabetically by name within the ZIP code, with the ZIP codes in ascending order. (See the Understanding Outputs chapter for more information about sort order codes.) TA sets this field to the sort code specified when the user-defined output was created; however, you can enter a different sort code. You can press the [F9] key for a list of sort codes.

Sender

The sender indicates the salutation record to use. (See the Understanding Outputs chapter for more information about the sender.) TA sets this field to the sender specified when the user-defined output was created; however, you can enter a different sender. You can press the [F9] key for a list of solicitor brief names.

Alternate Sender

The alternate sender indicates the alternate salutation record to use. (See the Understanding Outputs chapter for more information about the alternate sender.) TA sets this field to the alternate sender specified when the user-defined output was created; however, you can enter a different alternate sender. You can press the [F9] key for a list of solicitor brief names.

Requested By

This field identifies the person requesting the output. TA sets this field to the brief name of the user identified on the QOS record; however, you can enter a different brief name to associate the output with a different person. You can press the [F9] key for a list of values.

Column Headers?

You can mark the Column Headers? checkbox to indicate that you want column headers to be used in the output file (i.e., TA should include field labels with the data returned). Column headers can be extremely useful when using the output file to perform a mail merge.

Include Invalid Addresses?

You can mark the Include Invalid Addresses? checkbox if you want addresses with an undeliverable status to be considered when query and output processing picks an address for an account. When you mark the Include Invalid Addresses? checkbox, TA broadens the address selection rules to include addresses containing any status except "D" for delete. This feature may be helpful if you are running a query to get a list of accounts that do not have an active address.

Table Output Options Window

Output Name

TA displays the name of the scheduled output at the top of the Table Output Options window. You cannot change this information.

Table Options

The table options indicate how the output table will be saved. The table options include the following:

- "C" for "Create new output table."
- "R" for "Replace existing output table by dropping the old one and creating a new one."

Table Name, Database Link, Schema, and Storage Options

See "[Table Output Options](#)" for more information about these options.

Preferred Address

The preferred address indicates the preferred type of address to use for this output (e.g., "P" for premium). TA uses a series of address selection rules to determine the address record from which to pull address information. Setting the preferred address indicates that addresses of this type are preferred for use in the output table if the account has an address of the specified type. You can press the [F9] key for a list of address types.

Note: If you set a preferred address type here, TA overrides any preferred address information set on the query for this QOS record.

Preferred Telephone

This field is in development for a future release of TA.

Preferred E-mail

The preferred e-mail indicates the preferred type of e-mail address to use for this output.

Sender

The sender indicates the salutation record to use. (See the Understanding Outputs chapter for more information about the sender.) TA sets this field to the sender specified when the user-defined output was created; however, you can enter a different sender. You can press the [F9] key for a list of solicitor brief names.

Alternate Sender

The alternate sender indicates the alternate salutation record to use. (See the Understanding Outputs chapter for more information about the alternate sender.) TA sets this field to the alternate sender specified when the user-defined output was created; however, you can enter a different alternate sender. You can press the [F9] key for a list of solicitor brief names.

Requested By

This field identifies the person requesting the output. TA sets this field to the brief name of the user identified on the QOS record; however, you can enter a different brief name to associate the output with a different person. You can press the [F9] key for a list of values.

Include Invalid Addresses?

You can mark the Include Invalid Addresses? checkbox if you want addresses with an undeliverable status to be considered when query and output processing picks an address for an account. When you mark the Include Invalid Addresses? checkbox, TA broadens the address selection rules to include addresses marked Do Not Mail as well as those containing any status except "D" for delete. This feature may be helpful if you are running a query to get a list of accounts that do not have an active address.

Setting the Parameters for an Update Procedure or Report

When you schedule an update procedure or report to run with a query, you must first set the parameters that notify TA what information you are updating or using to generate a report.

To set the parameters for either an update procedure or a report, follow the steps below.

1. Highlight the update procedure or report in the Output block. (The category is "Update Procedure" or "Report" respectively.)
2. Click the <Zoom> button to the left of the output name. TA displays the Output Parameter Form window.

3. Set the parameters on the Output Parameter Form window to indicate how you want TA to process the update procedure or report.
4. Click <Close> to return to the Query and Output Schedule screen.

Note: See the Understanding Update Procedures chapter for information about setting the fields on each update procedure. See the appropriate report chapter for specific information about each report (e.g., the Account Profile report is documented in the Account Reports chapter).

Adding a Note to a QOS Record

You can add a note to the QOS record to enter a description "in English" of the QOS record to enable other users to understand the purpose of the QOS record. To add a note to a QOS record, follow the steps below.

1. Click <Notes> on the toolbar.
2. Enter a note up to 2000 characters long.
3. Click <Close> to return to the Query and Output Schedule screen.

Setting the Parameters for a Parameterized Query

A parameterized query is a query that contains parameters in place of fixed values to enable you to set the values for the parameters each time the query is scheduled. (See the [Understanding Queries chapter](#) for more information about parameterized queries.)

There are two ways to access the Run-Time Parameters window in order to set the parameters for a parameterized query.

- TA automatically displays the Run-Time Parameters window when you schedule a parameterized query on the Query and Output Schedule screen.
- You can click <Parameters> from the Query and Output Schedule screen.

Note: The <Parameters> button will be disabled if the scheduled query is not a parameterized query.

Once you have accessed the Run-Time Parameters window, follow the steps below to enter values for each parameterized field in the query.

1. Move your cursor to the line in the Value column where you want to enter information.
Note: TA displays the default value for the parameter if it was entered when the query was created; otherwise the parameter value is blank.
2. Enter information according to the prompt in the Parameter column, or leave the field set to the default value if the default information is correct.
Note: See the [Understanding Queries chapter](#) for information about the format in which you should enter each value.
3. Repeat the above steps for each parameter.
4. Click <Close> to return to the Query and Output Schedule screen.

Running a Query

Once a QOS record has been set up for a query and any associated outputs, there are two ways to set the QOS record to run.

- You can set a single query or set of queries to run through the Schedule Administration screen (i.e., you can schedule the Query and Output Processing operation through the Schedule Administration screen). For example, you can schedule a particular query to run during nightly processing by specifying the query name, schedule date, and sequence number of the QOS record, or you can schedule an entire group of records to run by specifying the group name. See the [System Administration chapter](#) for more information about scheduling Query and Output Processing on the Schedule Administration screen.
- You can run a query immediately through the Query and Output Schedule screen.

To run a particular query right away on the Query and Output Schedule screen, complete the following steps.

1. Click <Run>. TA displays the Request an Operation window. The information TA displays on the Request an Operation window identifies the QOS record you are running, and defaults to the scheduled query with which you have been working.

Note: Follow your organization's policy regarding submitting more than one query to run in this way. If you do submit multiple queries to run together, the Complete After Error? field indicates whether the other queries should run if the first one fails. TA defaults this field to "Y" for yes to indicate that the other queries should continue to run.

2. Click <Submit> for TA to run the query/output.

Note: You must exit the Query and Output Schedule screen in order for TA to process the request.

See Also:

[Viewing the Information TA Sets After Running a QOS Record](#)

[Viewing the Errors if a QOS Record Runs in Error](#)

Viewing the Information TA Sets After Running a QOS Record

TA sets the date the QOS record ran in the Run Date field. TA sets the total number of minutes that TA took to process the query and output(s) in the Time field.

If you zoom to an output that has run, you can view the run date and the number of minutes that the output took to run.

Viewing the Errors if a QOS Record Runs in Error

If a QOS record runs in error, you can view the error message by following the steps below.

1. Select Request Status from the System menu. TA displays the Submitted Requests window.
2. Highlight the query and output operation that ran in error and press [CTRL] [F10]. TA displays the Errors window with a description of the error.

Note: If you have further questions about this error, contact TSI Support for help.

3. To close the Errors window, click <Close>. TA returns you to the Submitted Requests window.
4. To close the Submitted Requests window, click <Close>.

Rescheduling a Query/Output

You can reschedule a single QOS record or a group of QOS records through the Reschedule Query and Output Schedules screen. The information TA displays on the top half of the Reschedule Query and Output Schedules screen identifies the QOS record you are rescheduling. Once you reschedule a single or group of QOS records, you can view each new QOS record on the Query and Output Schedule screen and make changes if necessary.

Note: When you reschedule a QOS record, TA copies any linked outputs and group information contained on the original QOS record to the new QOS record.

See Also:

[Rescheduling a Single Query/Output](#)

[Rescheduling a Group of Queries/Outputs](#)

[Setting the Fields on the Reschedule Query and Output Schedules Screen](#)

Rescheduling a Single Query/Output

When you reschedule a single QOS record, you want to make sure to leave the Group Name field blank but set every other field that is used to narrow down the rescheduling to a single record. (See "[Setting the Fields on the Reschedule Query and Output Schedules Screen](#)" which follows this section for a description of the fields.)

To reschedule a single QOS record, complete the following steps.

1. Access the record you want to reschedule on the Query and Output Schedule screen.
2. Click <Reschedule> to access the Reschedule Query and Output Schedules screen. TA sets the information based on the query with which you were working.
3. You can set the following information to identify the new QOS record: the New Query Schedule Date field, the effective date options, and the Delete Old? checkbox. See "[Setting the Fields on the Reschedule Query and Output Schedules Screen](#)" for descriptions of these fields.
4. Click <Run> to run the reschedule procedure. TA displays the message "Are you sure you want to create these [number of records] Query/Output schedule records?" If the number is what you want (i.e., one in this case), click <Yes>. If this number is not what you want, click <No>, change the fields, and then click <Run> again.
5. Click <Exit> to return to the Query and Output Schedule screen.

Note: You can also access the Reschedule Query and Output Schedules screen directly through the menu and set the fields to those you want TA to use.

Rescheduling a Group of Queries/Outputs

You can reschedule a group of QOS records [if you identified each QOS record as part of a group](#) and successfully ran each of the queries in the group at least once. You can also schedule a subset of the group. See "[Setting the Fields on the Reschedule Query and Output Schedules Screen](#)" for a description of the fields.

Note: If you access the Reschedule Query and Output Schedules screen directly from the Menu, TA leaves the fields blank (or TA may default some fields if you have been working with queries in your current session). This makes it easier for you to identify the group; however, you could also click <Reschedule> from the Query and Output Schedule screen and then delete the fields you do not want TA to use to limit its selection.

How To Reschedule a Group of QOS Records

1. Access the Reschedule Query and Output Schedules screen.
2. Set the Group Name field to the group you want reschedule.
3. If you want to further limit the records TA reschedules to a subset of the group, you can set the other fields appropriately.
4. You can set the following information to identify the new QOS record: the New Query Schedule Date field, the effective date options, and the Delete Old? checkbox. See "[Setting the Fields on the Reschedule Query and Output Schedules Screen](#)" for descriptions of these fields.
5. Click <Run> to run the reschedule procedure. TA displays the message "Are you sure you want to create these [number of records] Query/Output schedule records?" If the number is what you want,

click <Yes>. If this number is not what you want, click <No>, change the fields, and then click <Run> again.

6. Click <Exit> to return to the Query and Output Schedule screen. (TA does not automatically refresh the Query and Output Schedule screen. To access the rescheduled QOS record(s) on the Query and Output Schedule screen, find the record(s). See "[Finding a Scheduled Query](#)".)

Note: If your query group should run on a frequency, make sure that the frequency is specified in the Frequency field on each query in the group on the Query and Output Schedule screen. You can now schedule the group by scheduling the Query and Output Processing operation through the Schedule Administration screen. See the [System Administration chapter](#) for more information about scheduling Query and Output Processing on the Schedule Administration screen.

Setting the Fields on the Reschedule Query and Output Schedules Screen

Identifying the QOS Record(s) You Want to Reschedule

The QOS record(s) must meet all of the criteria you specify in the Reschedule Query and Output Schedules screen, so only set those fields that you want to use to limit the records TA reschedules.

Field(s)	Option
Group Name	<p>You can limit the QOS records to reschedule based on the group to which the QOS records belong. You can press the [F9] key to select from a list of group names.</p> <p>Note: Before you can schedule a group of queries, you must first run each of the individual queries in this group (the group name must be specified) on each query. Once you have run all of the queries in the group and they have a status of "F" for finished, you can reschedule the whole group.</p>
Query	<p>You can limit the QOS records to reschedule based on the query name. You can press the [F9] key to select from a list of query names.</p>
Beginning and Ending Schedule Date	<p>You can limit the QOS records to reschedule based on a date range; that is, the schedule date of the QOS record(s) that you are rescheduling falls within the range set by the Beginning Schedule Date and Ending Schedule Date fields. You can enter the beginning and ending dates using the MM/DD/YY format.</p>
Beginning and Ending Record Sequence	<p>If you set a date range, you can also limit the QOS records to reschedule based on a range of sequence numbers; that is, the sequence number of the QOS record(s) you are rescheduling falls within the range specified in the Beginning Sequence Number and Ending Sequence Number fields.</p>

Field(s)	Option
Status	You can limit the QOS records to reschedule based on the status of the QOS record.

Indicating How TA Should Create the New QOS Record(s)

TA uses the following information to determine how it should set up the new QOS record(s).

Field	Option
New Query Schedule Date	<p>You can set the schedule date on the new QOS record, using the MM/DD/YY format.</p> <p>Note: TA defaults the new query schedule date to the current date. However, if the original QOS record ended in error, TA defaults the new query schedule date to the date of the original QOS record.</p>
Effective Date Option	You can indicate which effective date the rescheduled records should use, if any, by setting the effective date option. Your choices include the old effective date, the new schedule date, a different date that you specify (using the MM/DD/YY format), or no effective date.
Delete Old?	You can indicate whether the "old" QOS record(s), that is, the QOS records that you are rescheduling, should be replaced by the new one(s). If the checkbox is marked, TA deletes the old records when the new ones are created. If the checkbox is not marked, TA retains the old records when the new ones are created.

See Also:

[Examples \(Rescheduling a QOS Record\)](#)

Examples (Rescheduling a QOS Record)

If you want to reschedule all of the records within a particular group that have a status of "P" for pending, you could set the fields as follows:

- Set the Group Name field to the group you want to reschedule. (Note that you must have successfully run each of the queries in the group before you can reschedule the group.)
- Set the Status field to "P" for pending.
- Set the New Query Schedule Date to the date you want the group of records to run.
- Set the Effective Date Option to indicate which effective date you want to use.
- Leave the Delete Old checkbox marked to delete the old schedule record, or unmark the Delete Old checkbox to retain the old schedule record.

If you want to reschedule a certain query that ran in error, you could set the fields as follows:

- Set the Query field to the name of the query you want to reschedule.
- Set the Status field to "E" for errors.
- Set the New Query Schedule Date to the date you want the queries to run.
- Set the Effective Date Option to indicate which effective date you want to use.
- Leave the Delete Old checkbox marked to delete the old schedule record, or unmark the Delete Old checkbox to retain the old schedule record.

Removing a Query From the Schedule

You can mark a scheduled query for deletion to remove it from the schedule if that query should no longer be used.

Note: A QOS record that is marked for deletion is not deleted until your organization runs delete processing.

To remove a query from the schedule, complete the following steps.

1. Access the Query and Output Schedule screen.
2. Find the QOS record with which you want to work. See "[Finding a Scheduled Query](#)".
3. Click <Delete> on the TA toolbar.

Note: If you mark a scheduled query for deletion and then decide that the query should not be removed from the schedule, you can "unmark" the QOS record so that delete processing does not delete it.

Working with Query Retrieved Records

Use the Query Retrieved Screen to view the records retrieved by a query and make changes to the list (if necessary) such as adding or deleting accounts before applying a user-defined output, or running an update procedure or report against the list of records. You do all of this on the Query Retrieved screen.

For example, you might have run a query to pull a group of your major donors to invite them to a special event. Before creating the output file by running the query with the user-defined output, the president sends you a list of people that he wants to invite. You can access the query retrieved records on the Query Retrieved screen and add the additional accounts to the invitation list.

- You can edit only the records retrieved by [queries that you own](#) or by queries that have been specifically set up to allow their records to be edited by other users. See [Allowing Other Users to Edit Retrieved Records](#) for more information about indicating that query retrieved records can be edited.
- The how long records are saved in the Query Retrieved table is determined by the expiration date set on the query, which may be set by the [Days Until Queried Records Expire](#) system preference. See the [Understanding Queries chapter](#) for more information about the expiration date of query retrieved records.
- Use the **?** field to navigate to account-based screens, such as the Classification Entry screen, for the account that you have highlighted. Press [F9] and select a screen. TA navigates you to the screen. When you exit, you return to the Query Retrieved screen.

Finding Records Selected by the Query

- [Access the query on the Query Entry screen and click <View Recs>](#): If you are working with a query that has retrieved records stored in the Query Retrieved table, you can access the retrieved records from the Query Entry screen. If there are no retrieved records for that query stored in the Query Retrieved table, TA gives you a message notifying you that no records exist.

- Access the Query Retrieved screen and find by query:

Enter the query name in the Query field to find the retrieved records for a particular query or use the percent sign ("%") as a wildcard character in the query name to find a set of queries. For example, you can enter "TA ACK%" to find all of the query retrieved records for the standard TA acknowledgment queries. The percent sign represents all characters following those you enter for the query name. You can press the [F9] key to select from a list of queries with retrieved records.

Enter the brief name of the user who created the query in the Owner field to find the retrieved records based on the query owner.

- Access the Query Retrieved screen and find by effort. You can search for all of the records retrieved by one or more source queries at the same effort. In the Find Queried Records window, click <Find by Effort>. Press [F9] in each field and select each component of the source according to the records that you want to view. Click <Find> and TA displays the records retrieved by all source queries that match the activity, campaign, initiative, and effort.

See Also:

[Viewing Query Retrieved Records on the Query Retrieved Screen](#)

[Adding a Record to the Query Retrieved Table](#)

[Deleting a Record from the Query Retrieved Table](#)

Viewing Query Retrieved Records on the Query Retrieved Screen

The Query Retrieved screen displays all records retrieved by a query and acts as a gateway; you can access the details for the retrieved records and you can access and update other account information through the Query Retrieved screen. For example, you can view all records retrieved by a transaction-level query, zoom to view the details of a particular transaction, and access the Account Activity Entry screen to get more information about the donor all through the Query Retrieved screen.

Information TA Displays for Each Query on the Query Retrieved Screen

TA displays the following information about the query that retrieved the records. Note that these items are not updateable.

Field	Description
Query	TA displays the query name in the Query field. TA displays the query description to the right of the Query field.
Query Type	TA displays the type of query for which the records are retrieved (e.g., Transactions). TA displays the description of the query type (e.g., Transactions—Giver's Account) to the right of the Query Type field.
Owner	TA displays the brief name of the owner of the query retrieved records in the Owner field. TA displays the name line of the query owner to the right of the Owner field.

Information TA Displays for Each Query Retrieved Record on the Query Retrieved Screen

- TA displays the Account ID and name line for each record selected by an account-, address-, name-, transaction-, benefit-, interaction-, tribute-, or planned giving-level query.
- For all records selected by a source-level query, TA displays the record number (i.e., the number that corresponds to the order in which the source code was selected by the query), the source code, and the source code description.

Viewing the Details of a Particular Query Retrieved Record and Information you can Modify

Once you access the records retrieved by a particular query, you can view and update the information for the particular retrieved record by clicking the <Zoom> button to the left of the record you want to view in detail. TA includes details that match the query level.

You can press the [F9] key in the following fields to modify information that pertains to an individual query retrieved record: Name, Address, Salutation, and Action Code. You can also modify the information in the Action Comments and Ask Amount fields.

Note: If you specify address and salutation information in the user-defined output when it is scheduled, TA overrides the information you set on the Query Retrieved screen with information set on the user-defined output. See "[Setting Up a User-defined Output](#)".

Adding a Record to the Query Retrieved Table

You can add records to the Query Retrieved table for a query that already has retrieved records (e.g., you can manually add a donor to the list of donor's retrieved by a query). You can also add records to the Query Retrieved table for a query that does not yet have records in the Query Retrieved table (i.e., you can manually build a set of query retrieved records).

Adding a Record to the Query Retrieved Table When Records Already Exist

To add a record to the Query Retrieved table when records already exist, complete the following steps.

1. Access the Query Retrieved screen and find the query for which you want to add a record. See "[Working with Query Retrieved Records](#)".
2. Click <New> on the toolbar. TA displays the Create New Query Retrieved Record window.

Note: The fields TA displays on the Create New Query Retrieved Record window correspond to the query type (e.g., if you are adding a record to the records retrieved by a benefit-level query, TA displays the fields that pertain to account-level, transaction-level, and benefit-level information).

3. Enter the information that identifies the record you want to add to the Query Retrieved table (e.g., if you are adding a benefit-level record, you must enter benefit-level information). You must start by entering the Account ID in the Account field that corresponds to the record you want to add to the Query Retrieved table. You can press the [F9] key in each field that you have access to for a list of corresponding values.

Adding a Record to the Query Retrieved Table When Records Don't Already Exist

To add a record to the Query Retrieved table when records don't already exist, complete the following steps.

1. Access the Query Retrieved screen. TA displays the Find Queried Records window.
2. Click <New>. TA displays the Create New Query Retrieved Record window.
3. Enter the query name in the Query field.

Note: The fields TA displays on the Create New Query Retrieved Record window correspond to the query type (e.g., if you are adding a record to the records retrieved by a benefit-level query, TA displays the fields that pertain to account-level, transaction-level, and benefit-level information).

4. Enter the information that identifies the record you want to add to the Query Retrieved table (e.g., if you are adding a benefit-level record, you must enter benefit-level information). You must start by entering the Account ID in the Account field that corresponds to the record you want to add to the Query Retrieved table. You can press the [F9] key in each field that you have access to for a list of corresponding values.

Deleting a Record from the Query Retrieved Table

To delete a record from those records retrieved by a query, complete the following steps.

1. Highlight the record you want to delete.
2. Click <Delete> on the toolbar. TA displays the message "Are you sure you want to delete this record?"
3. Click <OK> to delete the record.

Reviewing the Query, Output, or History for a QOS Record

Viewing the History of a Query

Click <History> on the Query and Output Schedule screen to view the schedule history of the query with which you are currently working. TA displays the following information for each run of the query on the Scheduled Queries and Outputs window: Query name, scheduled date, and status of the QOS record. If the query has run, TA also displays the run date, number of records retrieved, and the number of minutes TA took to run the record.

Accessing the Query Entry Screen from the Query and Output Schedule Screen

Click <Queries> to access the scheduled query on the Query Entry screen.

Accessing the User-defined Output Entry Screen from the Query and Output Schedule Screen

Click <Outputs> to access the scheduled user-defined output on the User-defined Output Entry screen.