

Guide for:  
**SMART QUERY:**  
**INTERACTIONS BY OWNER/DATE RANGE**

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Anticipated Audience(s): ALL ALI CRM USERS WITH ACCESS TO CONSTITUENT RECORDS

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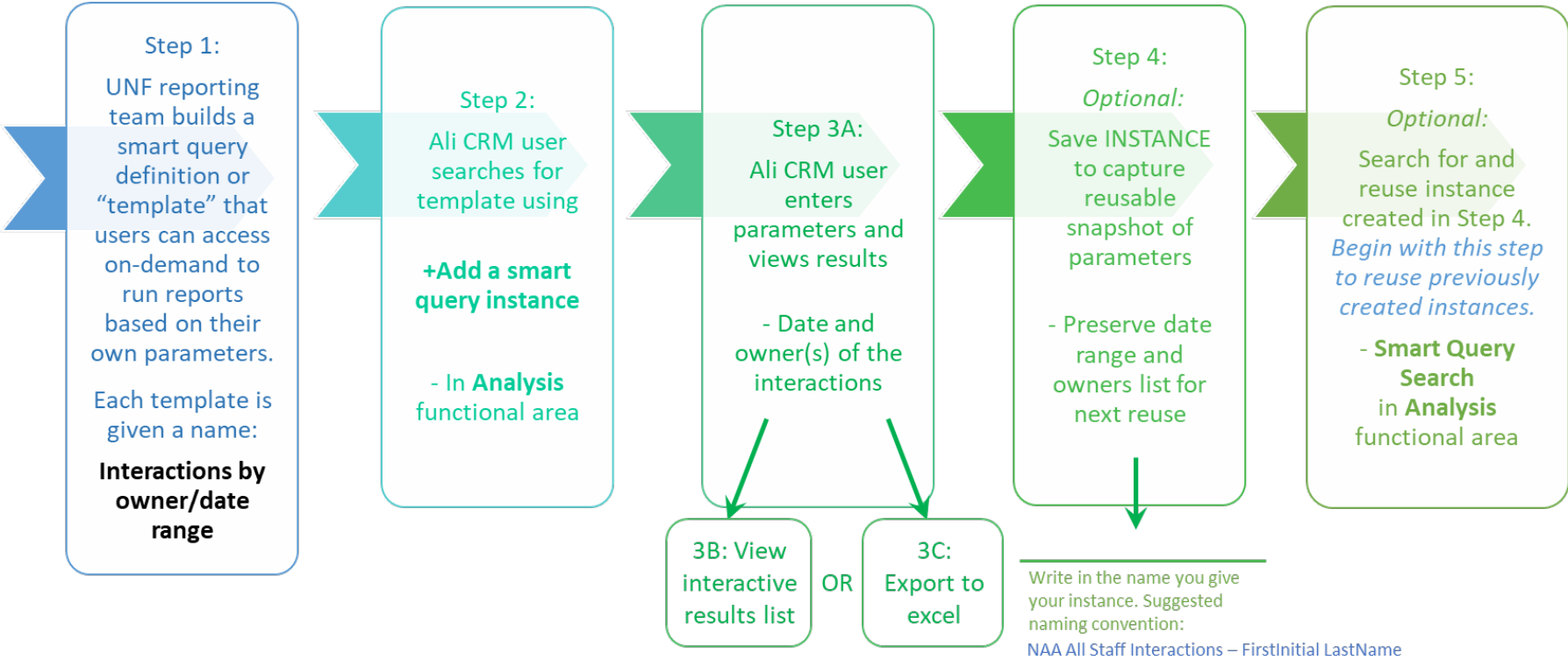
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**Who should use this smart query, and why?**

The purpose of this smart query is to allow users to browse interaction activity performed by certain staff or colleagues during a specified time period. The smart query described herein allows Ali CRM users with access to constituent records to run a smart query on-demand in order to view — and export, if desired — a list of interactions documented in Ali CRM for a specific list of owners (individual person or group of staff) by date range.

Understanding the smart query process

A brief overview of the smart query process will help users understand how the various steps fit together.



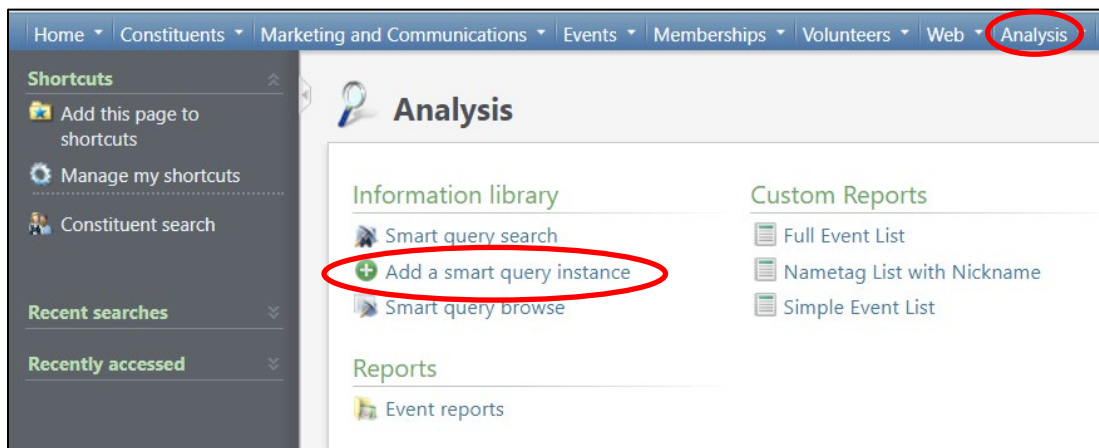
### Step 1: UNF reporting team builds a template

The first step — a complex process to build the template that can be used by others — is done by the foundation’s Research, Reporting and Analytics (RRA) team. Questions about queries and reporting should be directed to [servicedesk@nufoundation.org](mailto:servicedesk@nufoundation.org).

### Step 2: Ali CRM user searches for template created by the reporting team

When a user is ready to pull a smart query, their first step is to *build* a smart query instance and enter the parameters to report upon. A later step is optional and allows the user to save a snapshot of the parameters of the smart query so that the next time the report is run, the snapshot instance can be reused — including the list of owners.

Go to the **Analysis** functional area and select **+Add a smart query instance**.

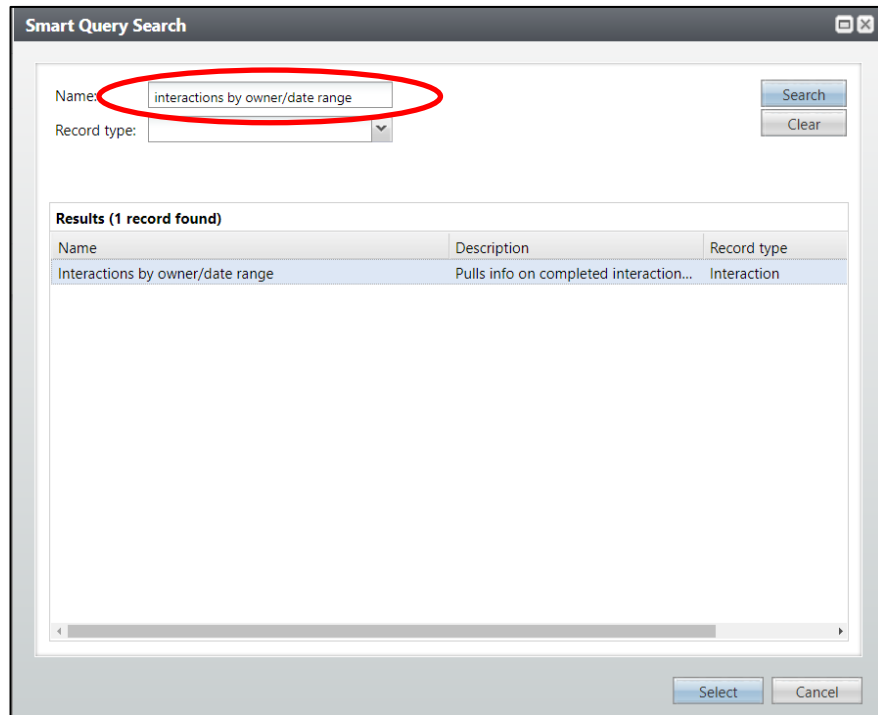


Tip: If this reporting task will be performed regularly, consider clicking **Add this page to shortcuts** for ease of future access.

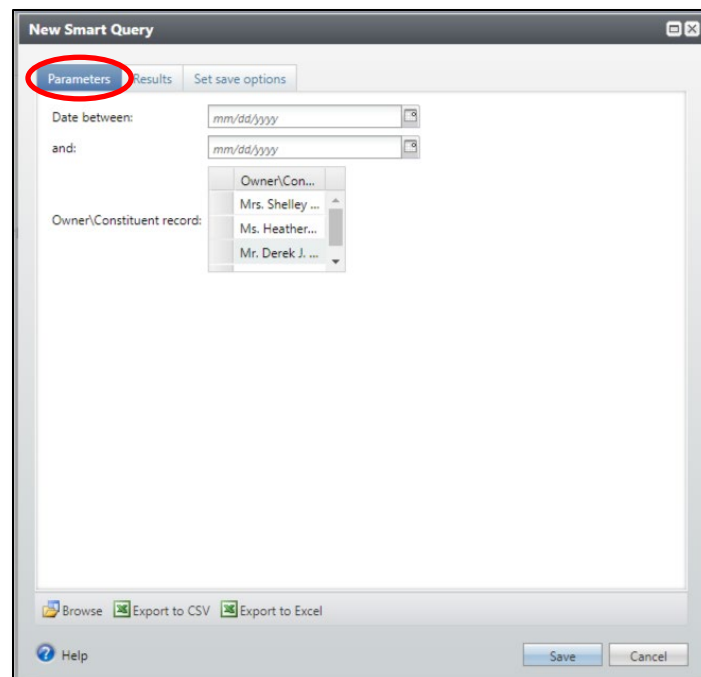
### Step 3: Enter parameters and view results

#### Step 3A: Enter reporting parameters

1. In the **Smart Query Search** box, in the **Name** field, type: **Interactions by owner/date range** and click **Search**. Once the results are populated, click the **Select** button at the bottom.



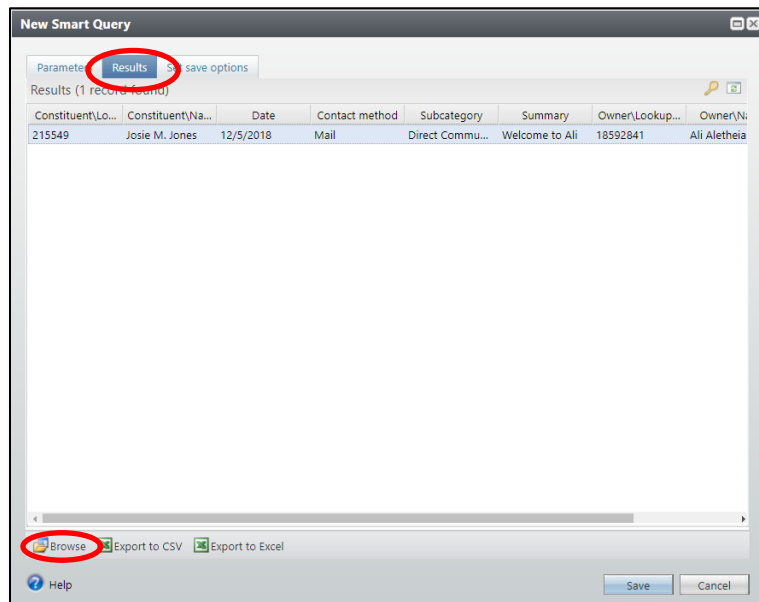
2. Working left to right across the tabs of this window, begin on the **Parameters** tab and populate the parameters upon which to report.  
**IMPORTANT: If the fields are left blank, it will pull all data. This is *not* recommended.**



- a. **Date between** filters for the range of interaction dates.
- b. **Owner\Constituent record** field is where to search for and select one or more interaction owners.
  - Note: Anyone added to an interaction as an **Attribute** or **Additional Solicitor** will *not* be included in the smart query results.

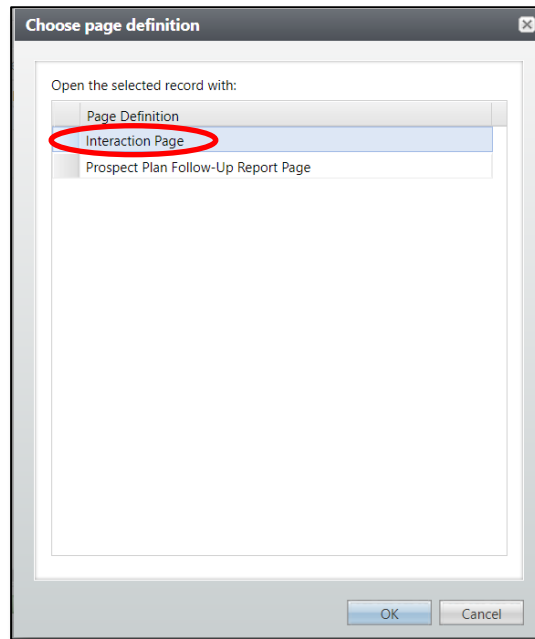
### Step 3B: View results

1. Click the **Results** tab.
  - a. The **Results** tab will display up to 500 interaction records in an interactive results list.
  - b. The screenshot below lists only one result, our demo record Josie Jones:

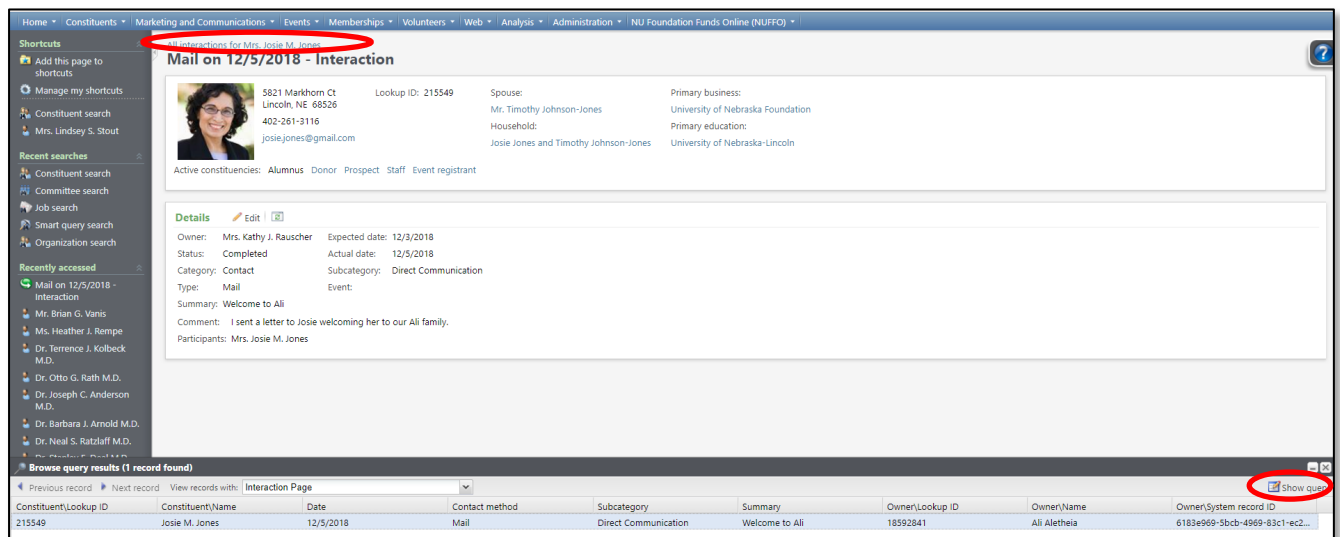


2. To drill down from the results list (displayed on the **Results** tab) to view a single interaction record:
  - a. Click on the row containing the constituent's name whose interaction record is to be viewed.
  - b. Click **Browse** to navigate directly to the interaction record.

3. Choose the page definition of **Interaction Page** and click **OK**.



- The query results will be displayed in a new pane at the bottom of the page and the interaction record will appear behind it on the upper-half of the screen:



4. Once reviewing the interaction is done, decide where to navigate next:

- To return to the smart query (and the full list of results), click the **Show Query** button. You can continue to view interactions by double clicking on

the row or by using the ‘previous’ and ‘next’ record navigation buttons on the left of the Browse query results window. Then click the **X** to close the lower results pane -OR-

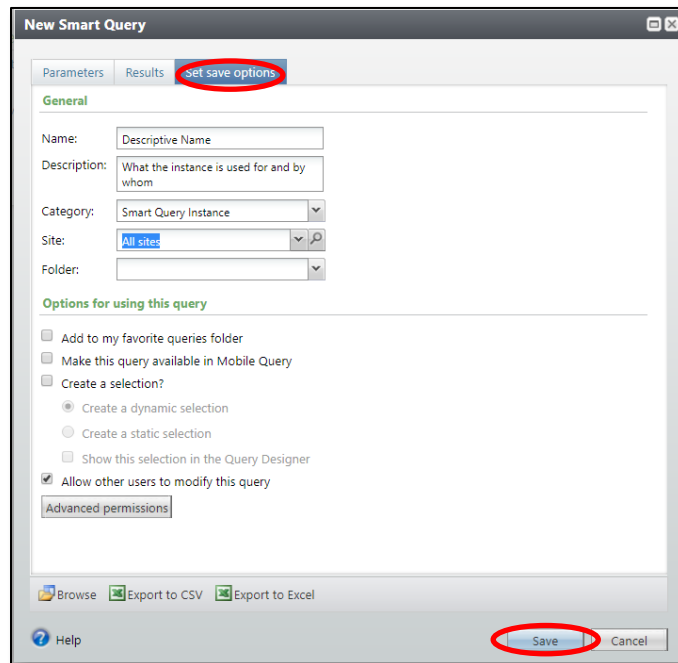
- To view the constituent record, click the breadcrumb at the top of the interaction record.

### Step 3C: Export to excel

OPTIONAL: To view the entire results list, click **Export to CSV** or **Export to Excel**. This is advantageous if the results list is longer than 500 records or if the downloaded data is to be used for some other purpose. Recall that foundation data management policies and protections apply; delete this file as soon as its intended use is complete.

### Step 4: OPTIONAL: Save instance to capture reusable snapshot of parameters

1. If this smart query’s parameters will be reused in the future, save an instance. This is useful so that the list of owners does *not* need to be rebuilt each time. It’s helpful to know that it *will* be possible to edit the list of owners later, whenever the instance is reused.
  - a. Click the **Set Save Options** tab.



- b. **Name** - Name the instance something that is easy to remember and recognize but also makes sense to others.

- **NAA All Staff Interactions – FirstInitial LastName** (i.e., J Jones)

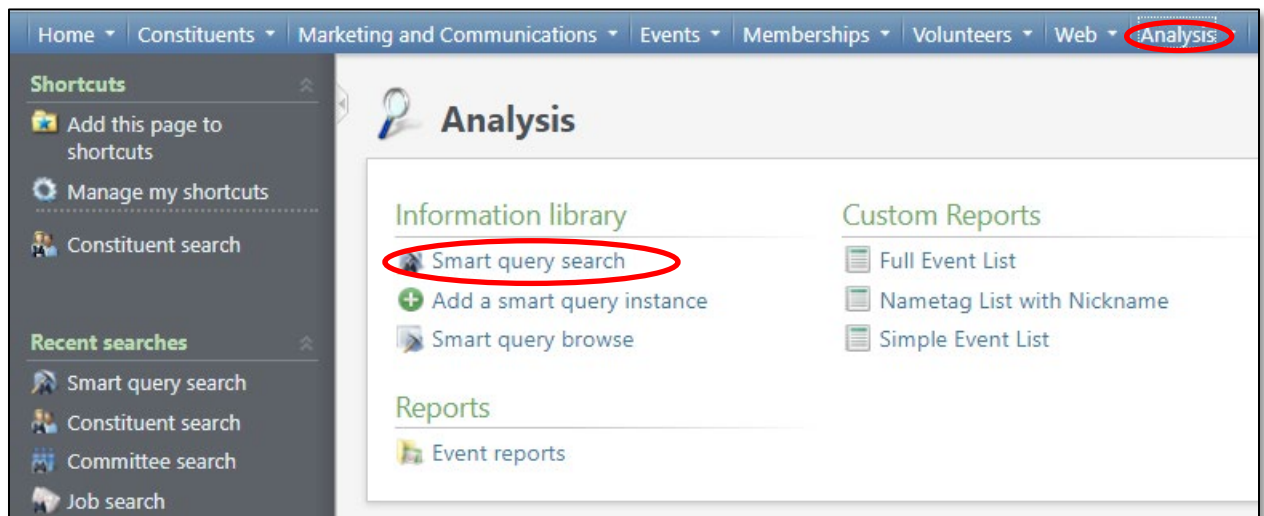
- b. **Description** - Always enter a description for the instance. The text should give information on how it will be used, by whom and if it is for permanent or temporary use.
    - **NAA All Staff Interactions - FirstInitial LastName - Permanent**
  - c. **Category** - Always use **Smart Query Instance**.
  - d. Do *not* adjust any other settings. (The screenshot defaults are illustrated above.)
2. Click **Save**.

If you do *not* want to save an instance, click the **X** to cancel out of the New Smart Query window without saving.

### Step 5: OPTIONAL: Search for and reuse instance

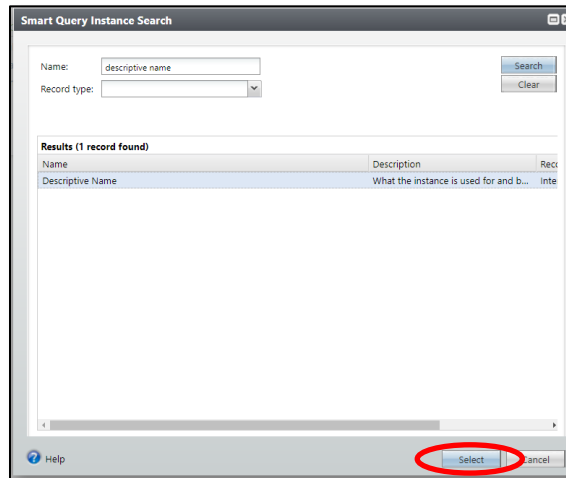
If you have previously saved an instance of a smart query, use the following steps to refresh the data results list.

1. Go to the **Analysis** functional area and select **Smart query search**.

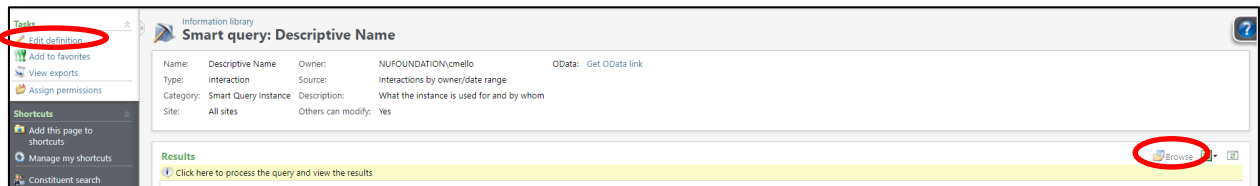




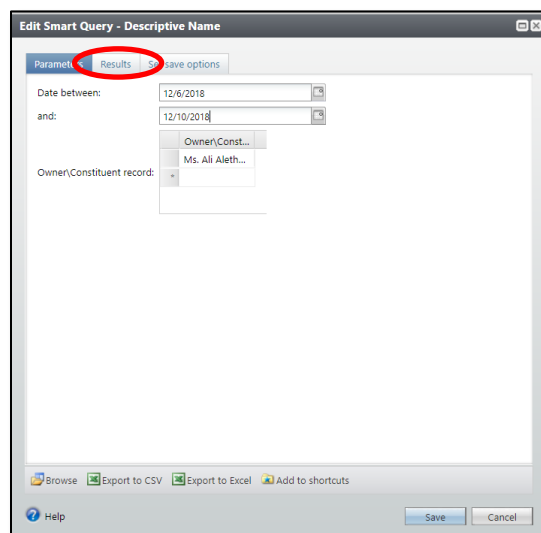
- In the **Smart Query Instance Search** box, enter the name you gave your instance when it was saved in Step 4 and click **Search**. Once the results are populated, click **Select**.



- The **smart query browse** page will display.
- Decide whether to reuse existing report parameters, or make updates to the owners:
  - To reuse the previously-saved parameters, click **Browse**.
  - To make changes to the smart query instance filters click **Edit definition** under **Tasks**.



- Make any desired changes to the filters (optional.) Then click the **Results** tab.



6. Follow steps in section [3A: Enter reporting parameters](#) above.

## Smart query instance: changes and maintenance

Understanding changes to smart queries involves two parts:

1. The *parameters* within the instance may be changed to alter *the results list* — and these parameters may be saved (or not) every time the smart query is run.
2. The smart query *instance* may also be edited.
  - If the name of the instance is changed, it **will only exist as the new name**. There is no Save As option.
  - As mentioned above — click on the **Set Save Options** tab in the query window and **rename the instance** if needed.
  - Users generally do not have authority to **delete a smart query instance**. Send a message to service desk ([servicedesk@nufoundation.org](mailto:servicedesk@nufoundation.org)) with the exact name of the instance to be deleted.
  - Foundation staff does a periodic review of the instances and may contact the creator to verify whether it is still needed.