

CQB Functionality

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Custom Query Builder Functionality – Synopsis

This document provides a functionality overview for the Custom Query Builder (CQB). There is a section for general CQB functions followed by sections that cover each screen's individual functionality features.

Custom Query Builder Help

Section 1: General Custom Query Builder Functions

This section covers some general CQB functionality features that apply to all screens within the query tool. Each screen is outlined in greater detail in later sections of this document.

Functionality Notes (See Figure 1):

- 1. Screen Name** – Each screen has a name so that users can easily identify their location within the tool
- 2. Screen Instructions** – Each screen has a brief directions section explaining how the screen is used
- 3. Navigation Buttons** – Each screen, excluding the “Query Tool Main Menu” screen and the “Query Summary and Save Options” screen, has ‘Next’ and ‘Back’ buttons for navigating to the next or previous CQB screen. The excluded screens are discussed in their specific sections later in this document (See *Table of Contents*)
- 4. Query Tool Links** – These links appear at the bottom of each CQB screen for easy navigation

Figure 1

The screenshot displays the 'Query Tool - Choose Datasource' screen. At the top left is the NASSGAP logo. The title is 'NASSGAP - National Association of State Student Grant & Aid Programs Annual Survey Query Tool'. Below the title is a yellow header bar with the text 'Query Tool - Choose Datasource'. Underneath is a text box with instructions: 'Use the dropdown menu and list box to select a datasource you would like to query. Once you have selected a datasource, click the "Next >" button to continue. Click the "< Back" button to return to the Main Query Menu.' Below the instructions are two sets of navigation buttons: '< Back' and 'Next >'. The main content area is divided into 'Categories:' and 'Datasources:'. Under 'Categories:', there is a dropdown menu showing '1 - Standard Data Sources'. Under 'Datasources:', there is a list box with 'Agency Information' and 'Program Questions'. At the bottom of the list box are two more navigation buttons: '< Back' and 'Next >'. At the bottom of the entire screen is a footer with a row of links: 'NASSGAP Home | Query Tool Menu | Privacy Policy | Site Map | Contact Us | Virtual Office | Logout'. Four numbered callouts (1-4) point to specific elements: 1 points to the yellow header bar, 2 points to the instruction text box, 3 points to the 'Next >' button above the list box, and 4 points to the footer link row.

Custom Query Builder Help

Section 2: Query Tool Main Menu Functions

This section discusses functionality specific to the “Query Tool Main Menu” screen.

Functionality Notes (See Figure 2):

1. **Login link** – The Login link allows users to log in to the query tool using their Virtual Office password. Logging in allows a user to save queries, it also allows users to access queries that are not available to the public. Once a user logs in, the Login link is replaced with a label identifying who is logged in.
2. **Create New Query link** – Clicking this link begins the process of creating a new query.
3. **Saved Queries Section** - This section provides the user access to queries that have been saved in the system. Access to saved queries is based on the query’s status which is set by the user who saves the query.
4. **New Icon** – When a query is created or recently updated the New icon is displayed beside the query name for two weeks
5. **Query Name link** – Clicking the query name link forwards the user to the “Query Summary and Save Options” screen for that query

Figure 2

**NASSGAP - National Association of State Student Grant & Aid Programs
Annual Survey Query Tool**

Query Tool Main Menu

Use this wizard to query NASSGAP's annual survey data. Either select from existing saved queries in the menu below, or click the **Create New Query** link to build your own. If you are a NASSGAP member, you may log in and save your queries.

1. [Login](#) (Allows you to save queries)

2. [Create New Query](#)

3. [Test Query](#)

| Query Name | Created By/On | Updated By/On | Status |
|---------------------------------------|---------------------|---------------------|--------|
| NEW Test Query | Ryan Gross 03/13/06 | Ryan Gross 03/13/06 | Public |

Related Help Topics:

[Saving Queries](#)
[Creating a Query](#)

Custom Query Builder Help

Section 3: Query Tool – Choose Datasource Functions

This screen presents functionality specific to the “Query Tool – Choose Datasource Functions” screen.

Functionality Notes (See Figure 3):

- 1. Categories Dropdown Menu** – Datasources are organized into category groups based on the content nature of the data contained within them.
- 2. Datasources Select Box** – This select box contains a list of the datasources within a chosen category. To select a category a user would click on the desired datasource name which would highlight the selected datasource.

Figure 3

**NASSGAP - National Association of State Student Grant & Aid Programs
Annual Survey Query Tool**

Query Tool - Choose Datasource

Use the dropdown menu and list box to select a datasource you would like to query. Once you have selected a datasource, click the "Next >" button to continue. Click the "< Back" button to return to the Main Query Menu.

< Back Next >

Categories: 1 - Standard Data Sources

Datasources: Agency Information
Program Questions

< Back Next >

Related Help Topics:

[Creating a Query](#)

Custom Query Builder Help

Section 4: Query Tool – Choose Data Fields Functions

This section outlines the functionality specific to the “Query Tool – Choose Data Fields” screen.

Functionality Notes (See Figure 4):

- 1. Data Source Name** – The datasource name of the datasource previously selected is displayed here
- 2. View All Fields Checkbox** – By Checking this box a user can quickly select all fields to be displayed in the query results.
- 3. View Column** – This Column allows users to select the data fields that are to be displayed in the query results by filling in the “View” column checkboxes associated with those fields
- 4. Filter Column** – This Column allows users to select the data fields that are to be filtered by in determining the query results. This is done by filling in the “Filter” column checkboxes associated with the desired fields.
- 5. Field Name Column** – This column is a list of fields within the chosen datasource
- 6. Sample Data Column** – This column displays a sample of the data that is stored in the corresponding data field

Figure 4

The screenshot shows the 'Query Tool - Choose Data Fields' interface for NASSGAP. At the top, there is a logo and the title 'NASSGAP - National Association of State Student Grant & Aid Programs Annual Survey Query Tool'. Below this is a yellow header bar with the title 'Query Tool - Choose Data Fields'. A text box explains the table below. The table has columns for 'View', 'Filter', 'Field Name', and 'Sample Data'. Below the table are expandable sections for 'Agency Information', 'General Agency Questions', 'Federal Programs Administered', 'Private Programs Administered', 'Agency Leadership', and 'Primary Need Based Program'. Navigation buttons '< Back' and 'Next >' are present at the top and bottom.

1. Data Source Name – The datasource name of the datasource previously selected is displayed here

2. View All Fields Checkbox – By Checking this box a user can quickly select all fields to be displayed in the query results.

3. View Column – This Column allows users to select the data fields that are to be displayed in the query results by filling in the “View” column checkboxes associated with those fields

4. Filter Column – This Column allows users to select the data fields that are to be filtered by in determining the query results. This is done by filling in the “Filter” column checkboxes associated with the desired fields.

5. Field Name Column – This column is a list of fields within the chosen datasource

6. Sample Data Column – This column displays a sample of the data that is stored in the corresponding data field

| View | Filter | Field Name | Sample Data |
|-------------------------------------|-------------------------------------|----------------------|--|
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | State Name | Alaska, Georgia, New York |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Survey Year | 2003, 2004 |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Agency Name | Alabama Commission on Higher Education, Alaska Commissi... |
| <input type="checkbox"/> | <input type="checkbox"/> | Special Annual Topic | No, Must be a U.S. citizen to receive state aid... |
| + General Agency Questions | | | |
| + Federal Programs Administered | | | |
| + Private Programs Administered | | | |
| + Agency Leadership | | | |
| + Primary Need Based Program | | | |

Custom Query Builder Help

Query Tool – Choose Data Fields Functions Continued

Functionality Notes (See Figure 5):

- 1. Default Selections** – Some Data sources include fields that are pre-selected by default. These selections can be unselected by removing the checks in the associated checkboxes.
- 2. Collapsed Category** – A category that is not selected for viewing
- 3. Expanded Category** – A category that is selected for viewing. Categories can include data fields and sub-categories of data fields. If a category contains both, the data fields will precede the sub-categories.
- 4. Collapsed Sub-Category** – A sub-category that is not selected for viewing
- 5. Expanded Sub-Category** – A sub-category that is selected for viewing

Figure 5

The screenshot displays the 'Program Questions' section of the Custom Query Builder. It features a table of data fields with checkboxes for selection. The interface includes expandable categories and sub-categories, with numbered callouts (1-5) highlighting specific features:

- 1:** Points to the checkboxes for 'State Name', 'Survey Year', and 'Program Name' in the main table.
- 2:** Points to the 'General Program Questions' category, which is collapsed.
- 3:** Points to the 'Standard For Award' category, which is expanded.
- 4:** Points to the 'Special Purpose' sub-category, which is collapsed.
- 5:** Points to the 'Merit' sub-category, which is expanded, showing a sub-table of merit components.

| View Filter | Field Name | Sample Data |
|-------------------------------------|--------------|---|
| <input checked="" type="checkbox"/> | State Name | Virginia, Mississippi, Hawaii |
| <input checked="" type="checkbox"/> | Survey Year | 2004, 2005, 2003 |
| <input checked="" type="checkbox"/> | Program Name | Alaska Supplemental Education Loan, Medical Education Program, PFAP |

| View Filter | Field Name | Sample Data |
|--------------------------|-----------------------------------|-----------------|
| <input type="checkbox"/> | Test Score Merit Component | CHECKED |
| <input type="checkbox"/> | Performance Merit Component | CHECKED |
| <input type="checkbox"/> | Class Rank Merit Component | CHECKED |
| <input type="checkbox"/> | Grades Merit Component | CHECKED |
| <input type="checkbox"/> | Minimum Grade For Merit Component | 3.25, 3.75, 2.5 |

Related Help Topics:

[Creating a Query](#)

Custom Query Builder Help

Section 5: Filter Data Fields Functionality

This section covers the functionality specific to the “Filter Data Fields Functionality” screen.

Functionality Notes (See Figure 6):

- 1. Filter Field Name** – The name of the filter fields previously chosen. Each chosen filter field’s name will be displayed next to its filter criteria choices.
- 2. Filter Criteria Choices** – Each filter field will have a list of filter criteria choices. The filter criteria choices determine how the data in the filter field will be filtered
- 3. Multi-Select Box** – This is associated with the “Must be selected in the following list” and “Must NOT be selected in the following list” filter criteria options. It allows the user to specify which data items to filter out or include from the filter field.
- 4. Select All/Deselect All Links** – These links provide a quick way for the user to select all items in the multi-select box, or to deselect all of the items. Notice that the associated multi-select box is within the gray highlighted area on the screen.

Figure 6

**NASSGAP - National Association of State Student Grant & Aid Programs
Annual Survey Query Tool**

Filter Data Fields

The table below shows each field you selected to filter. For each field, select a filter type (radio buttons). If your filter type uses the data in the list in the right column, highlight any values in that column. Otherwise, enter information in the text boxes in the middle column.

| Field Name | Filter Criteria | Multi-Select Box |
|-------------|---|---|
| Survey Year | <input type="radio"/> Must be filled in (NOT NULL). <input type="radio"/> Must be empty (NULL). <input type="radio"/> Must be selected in the following list: <input type="radio"/> Must NOT be selected in the following list: <input type="radio"/> Must contain this pattern: <input type="text"/> <input type="radio"/> Must be less than: <input type="text"/> <input type="radio"/> Must be greater than: <input type="text"/> <input type="radio"/> Must be between <input type="text"/> and <input type="text"/> | <input type="checkbox"/> 2003 <input type="checkbox"/> 2004 <input type="checkbox"/> 2005 |

[\(Select All\)](#) [\(Deselect All\)](#)

Related Help Topics:

[Creating a Query](#)
[Data Filtering Criteria](#)

Custom Query Builder Help

Section 6: Sort and Order Data Fields

This section outlines the functionality specific to the “Sort and Order Data Fields” screen.

Functionality Notes (See Figure 7):

- 1. Sort Order Textboxes** – By filling in these textboxes a user can specify the order to apply sorting to the data fields. Double clicking inside a sort order textbox will fill the textbox with the number corresponding to the next available sort order position.
- 2. Ascending/Descending Icons** – These arrows allow a user to set a field to sort in ascending or descending order. An up arrow represents ascending order, a down arrow represents descending order. A user can toggle between ascending and descending order by clicking on an arrow. The Ascending/Descending Icons only appear when the sort order has been set for a data field.
- 3. Field Name Column** – The data field names associated with the sort order and report order are located in this column.
- 4. Report Order Textboxes** – These textboxes allow a user to specify the order of how the data fields appear on the query results report. Double clicking inside a report order textbox will fill the textbox with the number corresponding to the next available report order position. Report order for fields that have not been specified by the user will be determined by order in which the fields appear on this screen.

Figure 7

**NASSGAP - National Association of State Student Grant & Aid Programs
Annual Survey Query Tool**

Sort and Order Data Fields

The table below shows all of the fields you selected to view in your report. If you would like to sort the data by any of the fields, double-click in the box to the left of that field. To change the sort direction, click the icon that appears next to the sort box. To change the order of the fields in your report, double click the report order text box to the right of the field you want to be first.

| Sort Order | Field Name | Report Order |
|------------|-------------|--------------|
| 1 | State Name | 1 |
| 3 | Survey Year | 3 |
| 2 | Agency Name | 2 |

Related Help Topics:

[Creating a Query](#)
[Sorting and Ordering Data](#)

Custom Query Builder Help

Section 7: Query Summary and Save Options

This section outlines the functionality specific to the “Query Summary and Save Options” screen.

Query Summary and Save Options - Summary and Options Sections

Functionality Notes (See Figure 8):

- 1. Summary Section** – This section gives some brief information related to the query that the user created.
- 2. Options Section** – This section shows the options related to the query that the user created
- 3. View Report link** – Clicking this link displays the query results in a new browser window in an HTML report format
- 4. View Report as Excel link** – Clicking this link displays the query results in an Excel spreadsheet in a new browser window
- 5. View Generated SQL link**– Clicking this link displays the generated SQL string that is automatically created for a query
- 6. Edit Query link** – Clicking this link forwards the user back to the “Choose Datasource” screen for the query that the user previously created. The user re-steps through each phase of the query building process making changes to the saved selections from the previously created query.
- 7. Return to Query Menu link** – This link brings the user back to the “Query Tool Main Menu” screen.

Figure 8

NASSGAP - National Association of State Student Grant & Aid Programs Annual Survey Query Tool

Query Summary and Save Options

Congratulations! You have created a report. On this screen, you have several options. You can view the report or export it to a file Excel can read, you can save the query (if you are logged-in), you can edit your query.

| | |
|-----------------|---|
| Summary: | Primary Datasource: Agency Information |
| | Query Status: Success! |
| | Records Returned: 53 |
| | Execution Time: 0.05 seconds |

Options:

- [View Report](#) Shows an HTML report in a new window.
- [View Report as Excel](#) Shows an Excel Spreadsheet in a new window.
- [View Generated SQL](#) Shows the generated SQL query string.
- [Edit Query](#) Allows you to edit your query.
- [Return to Query Menu](#) Takes you to the saved queries, where you can create a new query.

Share with other NASSGAP Members: No (Share with My Agency only)

Share with the public:

[Login](#) (Allows you to save queries)

Query Name:

Numbered callouts in the image: 1 points to the Summary section; 2 points to the Options section; 3 points to the View Report link; 4 points to the View Report as Excel link; 5 points to the View Generated SQL link; 6 points to the Edit Query link; 7 points to the Return to Query Menu link.

Custom Query Builder Help

Query Summary and Save Options - Save Section

Functionality Notes (See Figure 9):

- 1. Save Section** – This section shows the options associated with saving queries
- 2. Login link** – This allows a user to login to the query tool using their Virtual Office login information. Users must be logged in to save queries.
- 3. Query Name textbox** – This is where a user would name a query before saving it. By default the name “My Most Recent Query” is given to a query if a user does not explicitly enter a name.
- 4. Share with other NASSGAP Members dropdown menu** – Allows a user to set the viewing privileges for other NASSGAP members for a saved query
- 5. Share with the public dropdown menu** – Allows a user to set the viewing privileges for the public for a saved query
- 6. Save Query button** – Clicking this button saves the current query with the settings selected by the user
- 7. Delete Query button** – Clicking this button deletes the user’s current query information. If the current query was previously a saved query it will be deleted from the saved queries menu on the “Query Tool Main Menu” screen.

Figure 9

Query Summary and Save Options

Congratulations! You have created a report. On this screen, you have several options. You can view the report or export it to a file Excel can read, you can save the query (if you are logged-in), or you can edit your query.

| | |
|-----------------|---|
| Summary: | Primary Datasource: Agency Information |
| | Query Status: Success! |
| | Records Returned: 53 |
| | Execution Time: 0 seconds |

Options:

- [View Report](#) Shows an HTML report in a new window.
- [View Report as Excel](#) Shows an Excel Spreadsheet in a new window.
- [View Generated SQL](#) Shows the generated SQL query string.
- [Edit Query](#) Allows you to edit this query.
- [Return to Query Menu](#) Takes you to the list of saved queries, where you can create a new query.

Save:

[Login](#) (Allows you to save queries if you are not logged in)

Query Name:

Share with other NASSGAP Members:

Share with the public:

Numbered callouts: 1 points to the 'Save:' section; 2 points to the 'Login' link; 3 points to the 'Query Name' text box; 4 points to the 'Share with other NASSGAP Members' dropdown; 5 points to the 'Share with the public' dropdown; 6 points to the 'Save Query' button; 7 points to the 'Delete Query' button.

Related Help Topics:

[Creating a Query](#)
[Saving Queries](#)