

Creating a Query

Help Contents

Creating a Query - Synopsis	1
Phase 1: How to Begin a New Query	2
Phase 2: Choosing My Data Source	3
Phase 3: Choosing My Data Fields.....	4
Choosing My Data Fields - Selecting All Fields	4
Choosing My Data Fields - Selecting Specific Fields.....	5
Phase 4: Filtering My Data	6
Phase 5: Sorting and Ordering My Data.....	7
Phase 6: Viewing My Query Results.....	8

Creating a Query - Synopsis

This document walks a user through the six phases of creating a new query using the Custom Query Tool. Each phase outlined contains a brief information section followed by the steps necessary in order to move on to the next phase in the query building process. This document is intended to aid users in creating new queries. For a full list of help topics please review the Custom Query Builder Help Menu.

Custom Query Builder Help

Phase 1: How to Begin a New Query

Creating a Query begins on the “Query Tool Main Menu” screen. The “Query Tool Main Menu” screen provides the user with three options: Login, Create New Query, and Choose a saved Query. This section highlights the Create New Query option. For information related to the other options review the Custom Query Builder Help Menu.

Step 1

Click on the “Create New Query” link to begin building a new query. This forwards the user to the “Choose Data Source” screen.

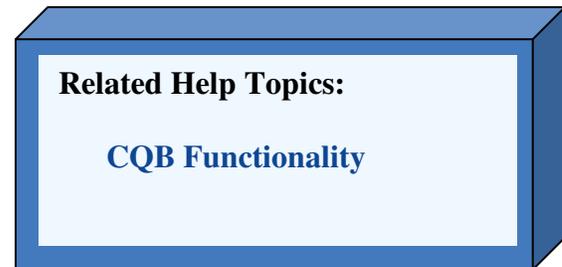
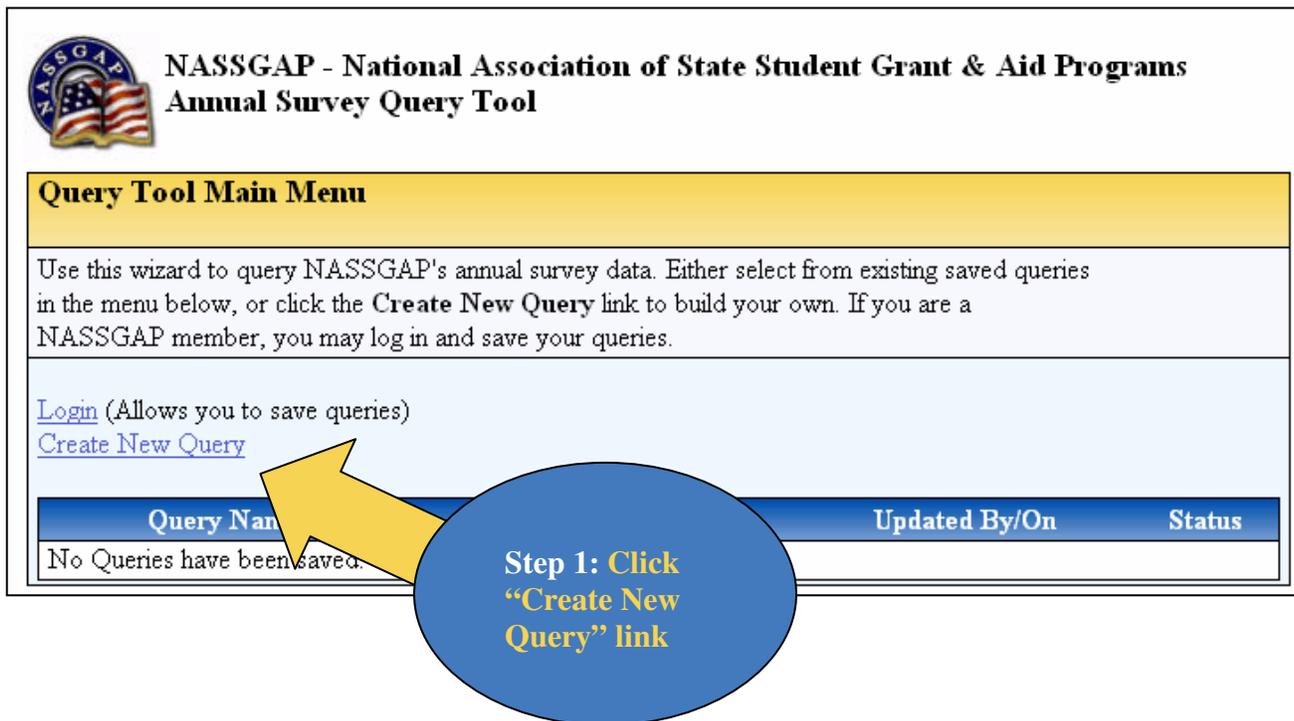


Figure 1



 **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.

[Login](#) (Allows you to save queries)
[Create New Query](#)

Query Name	Updated By/On	Status
No Queries have been saved.		

Step 1: Click “Create New Query” link

Custom Query Builder Help

Phase 2: Choosing My Data Source

In Phase 2 of the query building process the user is prompted to choose a data source on the “Choose Data Source” screen. Data sources are categorized, if the desired data source does not appear in the “Datasources:” select box, try selecting a different category.

Step 1

Select the data source category that you would like to choose from the “Categories” dropdown menu by clicking on your category selection.

Note: The data sources shown in the “Datasources” select box change when different categories are selected.

Step 2

Select the data source that you would like to use by clicking a data source name in the “Datasources” select box.

Step 3

Click the “Next” button to move on to the “Choose Fields” screen.

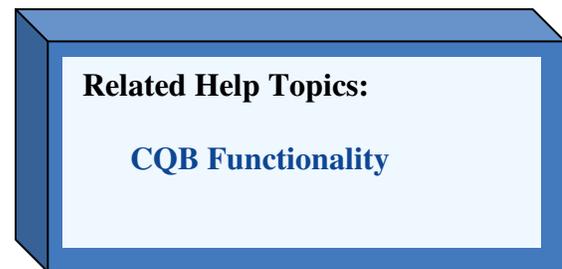
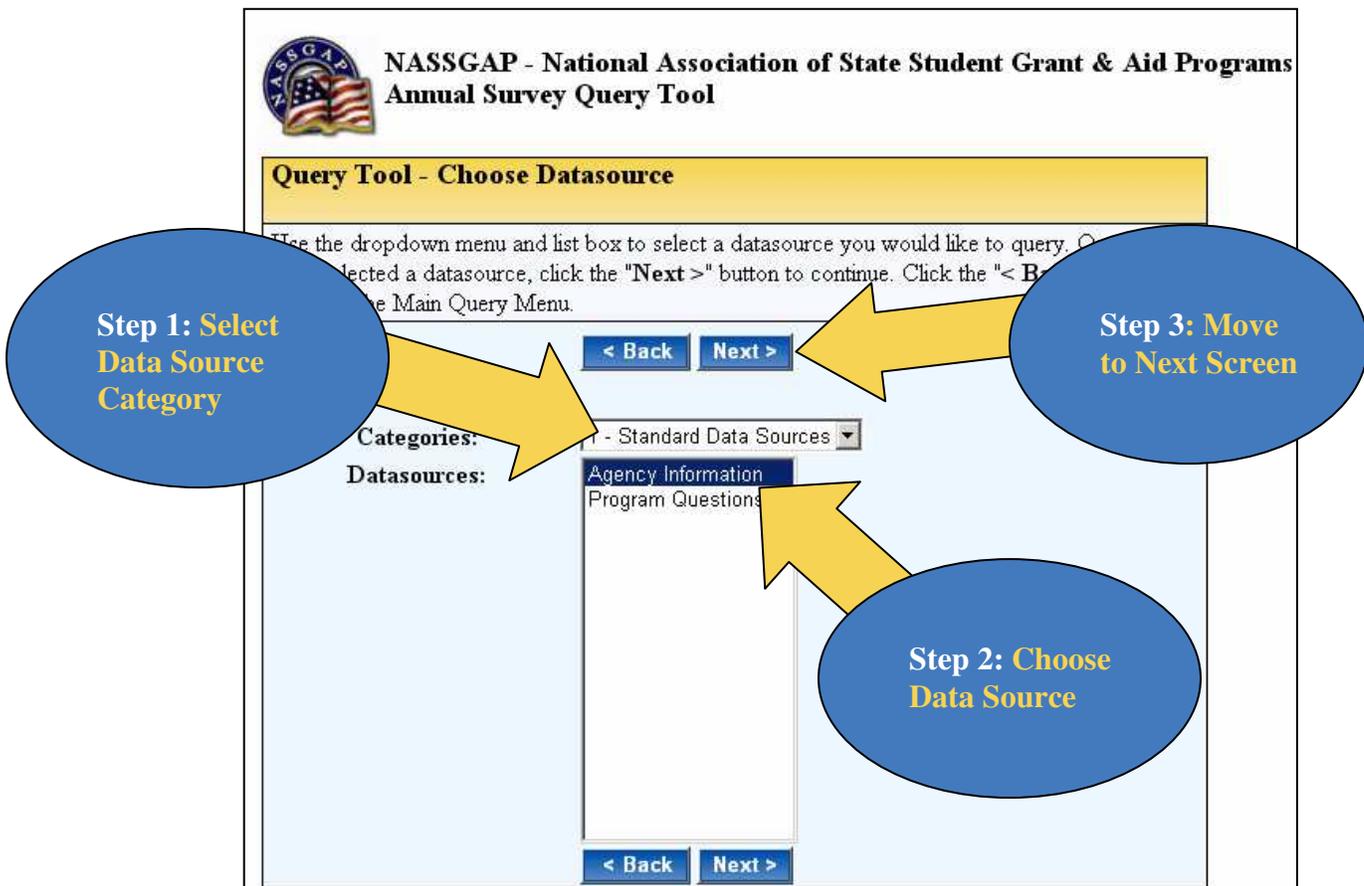


Figure 2



Custom Query Builder Help

Phase 3: Choosing My Data Fields

The “Choose Data Fields” screen allows a user to search for the data that is desired for a specific query. Categories and sub-categories aid users in navigating through the data.

The “Choose Data Fields” screen is also used when selecting which fields will be filtered on in the query. Filtering data is an optional phase in the query building process since no filter fields are required. Filtering is included as the next process phase in this documentation since most queries will include filtering.

Choosing My Data Fields - Selecting All Fields

Step1

Place a check in the “View All Fields” checkbox by clicking inside the checkbox.

Note: This places checks in the View column for all fields listed in the table.

Step 2

If necessary, choose filter fields.

Step 3

Click on the “Next” button to move to the next screen.

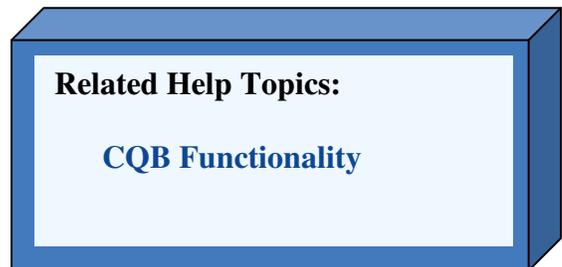
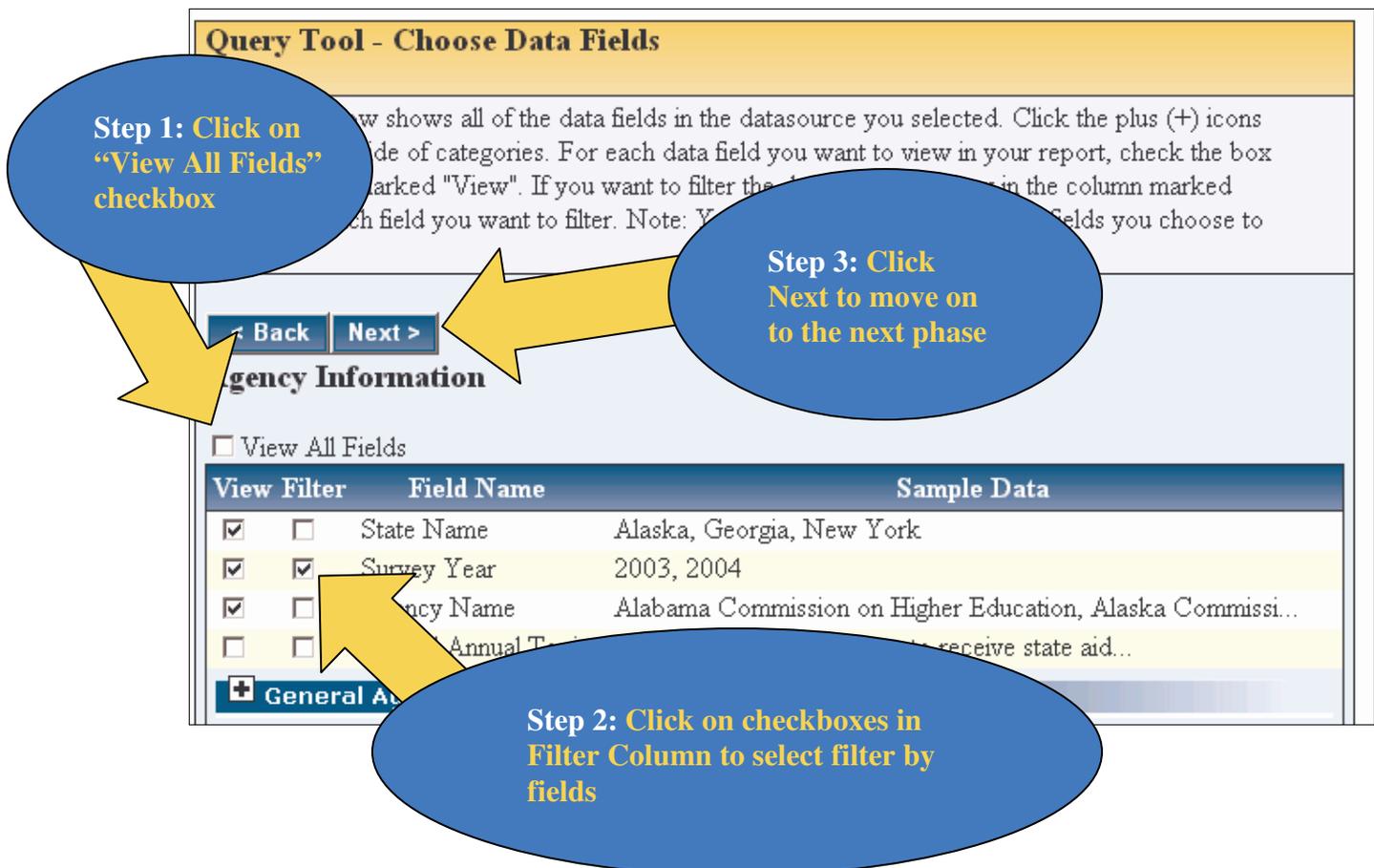


Figure 3



Query Tool - Choose Data Fields

Now shows all of the data fields in the datasource you selected. Click the plus (+) icons inside of categories. For each data field you want to view in your report, check the box marked "View". If you want to filter the data, check the box in the column marked "Filter". For each field you want to filter. Note: You can only filter on one field you choose to

View All Fields

View Filter	Field Name	Sample Data
<input checked="" type="checkbox"/>	State Name	Alaska, Georgia, New York
<input checked="" type="checkbox"/>	Survey Year	2003, 2004
<input checked="" type="checkbox"/>	Agency Name	Alabama Commission on Higher Education, Alaska Commissi...
<input type="checkbox"/>	Annual T...	... receive state aid...

General A...

Step 1: Click on "View All Fields" checkbox

Step 2: Click on checkboxes in Filter Column to select filter by fields

Step 3: Click Next to move on to the next phase

Custom Query Builder Help

Choosing My Data Fields - Selecting Specific Fields

Step 1

Search for the fields you need by expanding and collapsing the categories and sub-categories.

Step 2

When you find the desired fields, click in the check boxes in the "View" column to select those fields.

Step 3

If necessary, choose filter fields.

Step 4

Click the "Next" button to move on to the next screen.

Related Help Topics:

[CQB Functionality](#)

Figure 4

The screenshot shows the 'Query Tool - Choose Data Fields' interface. It includes a table of data fields with 'View' and 'Filter' columns. Annotations with arrows point to specific elements: Step 1 points to the category tree, Step 2 points to the 'View' checkboxes, Step 3 points to the 'Filter' checkboxes, and Step 4 points to the 'Next' button.

Step 1: Search for fields within categories and sub-categories

Step 2: Click in the checkboxes in the View column to choose specific fields

Step 3: Click on checkboxes in Filter Column to select filter fields

Step 4: Click Next to move on to the next phase

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

View	Filter	Field Name	Sample Data
<input type="checkbox"/>	<input type="checkbox"/>	Eligibility Requirements Set By State	CHECKED
<input type="checkbox"/>	<input type="checkbox"/>	Eligibility Requirements Set By Campus	CHECKED
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Eligibility Requirements Set By Other	CHECKED
<input type="checkbox"/>	<input type="checkbox"/>	Others Who Set Eligibility	The program being matched, NYS Education

Phase 4: Filtering My Data

The “Filter Data Fields” screen allows users to set filter criteria for each field selected as a filter field in the previous query building stage (*Choose Data Fields*). This is an optional phase in the query building process since selecting filter fields on the “Choose Data Fields” screen is not required.

In Figure 5, Survey Year is used as an example of a filter field. By default, Survey Year is selected on the “Choose Data Fields” screen since filtering by year is a common choice.

There are many different filtering criteria available for each filter field. This example demonstrates only one example, more information is available under the help topic “Filter Criteria”.

Step 1

Select your filter criteria by clicking on the appropriate radio button, in this case the “Must be selected in the following list:” criteria.

Related Help Topics:

[CQB Functionality](#)
[Data Filtering Criteria](#)

Step 2

Select your criteria from the multi-selection box, in this case a year.

Tip: Multiple items can be selected by holding down the ‘ctrl key’ and clicking on desired items.

Step 3

Click the “Next” button to move on to the next screen.

Figure 5

The screenshot shows the 'Filter Data Fields' interface. At the top, there's a title bar and a brief instruction: 'The table below shows each field you selected as a filter type (radio buttons). If your filter type uses the data from a column, enter information in that column. Otherwise, enter information in the adjacent column.' Below this are navigation buttons: '< Back' and 'Next >'. The main area is a table with 'Field Name' as the header. The first row is 'Survey Year'. To the right of the table are filter criteria options: 'Must be filled in (NOT NULL)', 'Must be empty (NULL)', 'Must be selected in the following list:' (which is selected), 'Must NOT be selected in the following list:', 'Must contain this pattern:', 'Must be less than:', 'Must be greater than:', and 'Must be between'. To the right of these options is a multi-select box containing the years 2003, 2004, and 2005. At the bottom of the table area are '(Select All)' and '(Deselect All)' buttons. At the very bottom of the screen are '< Back' and 'Next >' buttons. Three blue callout boxes with yellow arrows point to specific elements: 'Step 1: Click on radio button to select a filter criteria' points to the selected radio button; 'Step 2: Click on selection in multi-select box to define filter criteria' points to the year 2004 in the multi-select box; 'Step 3: Click Next to move on to the next phase' points to the 'Next >' button.

Phase 5: Sorting and Ordering My Data

The “Sort and Order Fields” screen is used to set sorting order of the previously chosen fields, and also for setting up the order of the fields in the query report.

Step 1

Set the sorting order for the chosen fields by filling in the text boxes with the appropriate order numbers. By default the query tool will not sort on any field if none are specified by the user.

Tip: You can fill in the textboxes quickly by double clicking inside of them. The order number placed in the textbox is dependant on the order in which you click the boxes.

Step 2

Set the sorting criteria for all sorting fields selected by clicking the arrow icon that appears next to the sort order textboxes that have been filled. An up arrow is for ascending order; a down arrow is for descending order.

Related Help Topics:

[CQB Functionality](#)
[Sorting and Ordering Data](#)

Step 3

Set the report order for the chosen fields by filling in the Report Order textboxes with the appropriate order numbers. By default the report order will follow the order that the fields are displayed in if no order is set by the user.

Tip: You can fill in the textboxes quickly by double clicking inside of them. The order number placed in the textbox is dependant on the order in which you click the boxes.

Step 4

Click the “Next” button to move on to the next screen.

Figure 6

The screenshot shows the 'Sort and Order Data Fields' interface. It features a table with columns for 'Sort Order' and 'Report Order'. The table lists several fields: State Name, Survey Year, Agency Name, Designated SHHEO, Primary Needs Analysis Methodology, Primary EFC Resources, State College Savings Plan Is Ex EFC, and Aid Car. The 'Sort Order' column has a dropdown menu with an arrow icon next to it. The 'Report Order' column has text input boxes. The interface includes '< Back' and 'Next >' buttons at the top and bottom. Annotations with arrows point to specific elements: Step 1 points to the 'Sort Order' text boxes, Step 2 points to the arrow icons, Step 3 points to the 'Report Order' text boxes, and Step 4 points to the 'Next >' button.

Sort Order	Field Name	Report Order
<input type="text"/>	State Name	<input type="text" value="2"/>
<input type="text"/>	Survey Year	<input type="text" value="1"/>
<input type="text"/>	Agency Name	<input type="text" value="3"/>
<input type="text"/>	Designated SHHEO	<input type="text"/>
<input type="text"/>	Primary Needs Analysis Methodology	<input type="text"/>
<input type="text"/>	Primary EFC Resources	<input type="text"/>
<input type="text"/>	State College Savings Plan Is Ex EFC	<input type="text"/>
<input type="text"/>	Aid Car	<input type="text"/>

Step 1: Set the Sorting Order by filling in the Sort Order Textboxes

Step 3: Set the Report Order of the fields

Step 2: Set the sort criteria by clicking the arrow icons

Step 4: Click Next to move on to the next phase

Custom Query Builder Help

Phase 6: Viewing My Query Results

The “Query Summary and Save Options” screen contains many different user options. This section will focus on the “View Report” option, which is a way to easily view query results. Please refer to the Custom Query Builder Help Menu for information related to the other options associated with this screen.

Step 1

Click the “View Report” link. This will open your query results in a new window in an HTML report format.

Related Help Topics:

[CQB Functionality](#)
[Saving Queries](#)

Step 2

View query results (*Figure 8*)

Figure 7

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:	99
	Execution Time:	0.02 seconds

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)

Query Name:

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

Share with the public:

Step 1: Click on the “View Report” link to view query results

Figure 8

http://darthvader/nassgapR2/customquery/CQB08Report.aspx - Microsoft Internet Explorer

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

Custom Query Report

Here are the results of your query. To return to your query, close this window.

Query: My Most Recent Query
 Report Generated on: March 2, 2006 11:45

Survey Year	State Name	Agency Name	General Agency Questions	Primary Need Based Program			
				Needs Analysis	Resource Modifications	Needs Analysis	
			Designated SHHEO	Primary Needs Analysis Methodology	Primary EFC Resources	State College Savings Plan Is Excluded From Primary EFC	Aid Can Be Applied Towards
2004	Alabama	Alabama Commission on Higher Education	Yes	Federal Methodology (FM)	Family resources (parent and student contribution)		Only approved tuition and fees

Step 2: View query results in the new window