Creating a Query

Help Contents

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.

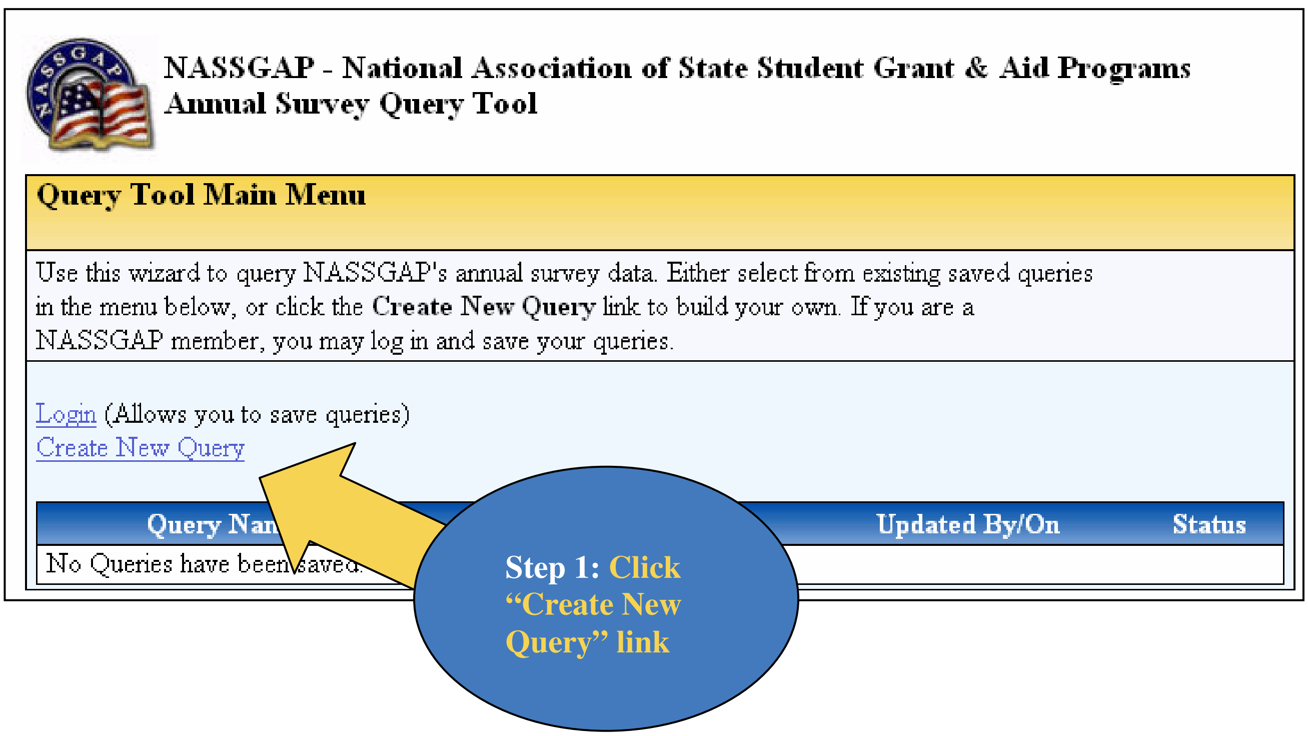
Step 1

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

Related Help Topics:

CQB Functionality

Figure 1



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.

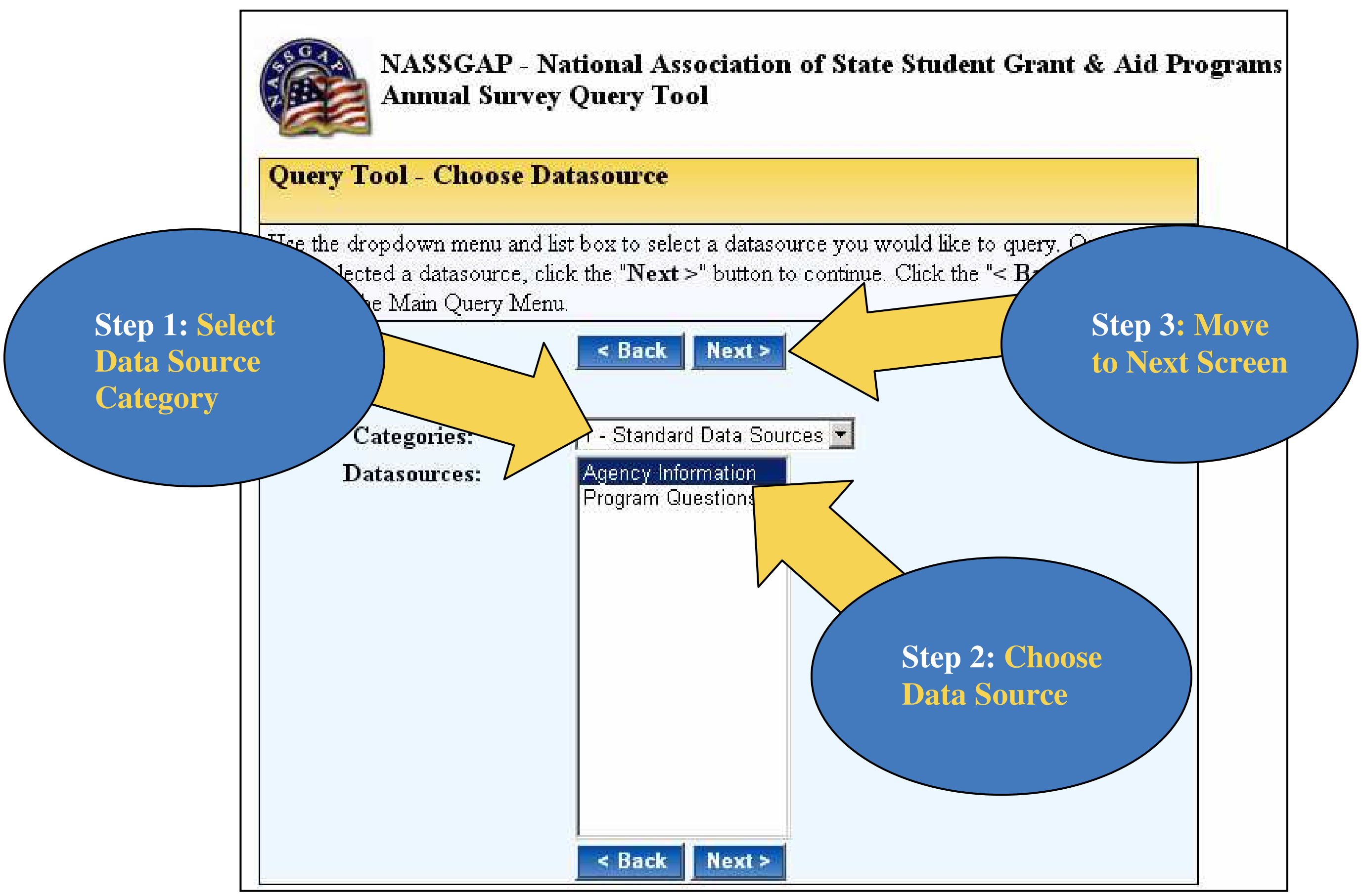
Step 3

Click the "Next" button to move on to the "Choose Fields" screen.

Related Help Topics:

CQB Functionality

Figure 2



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.

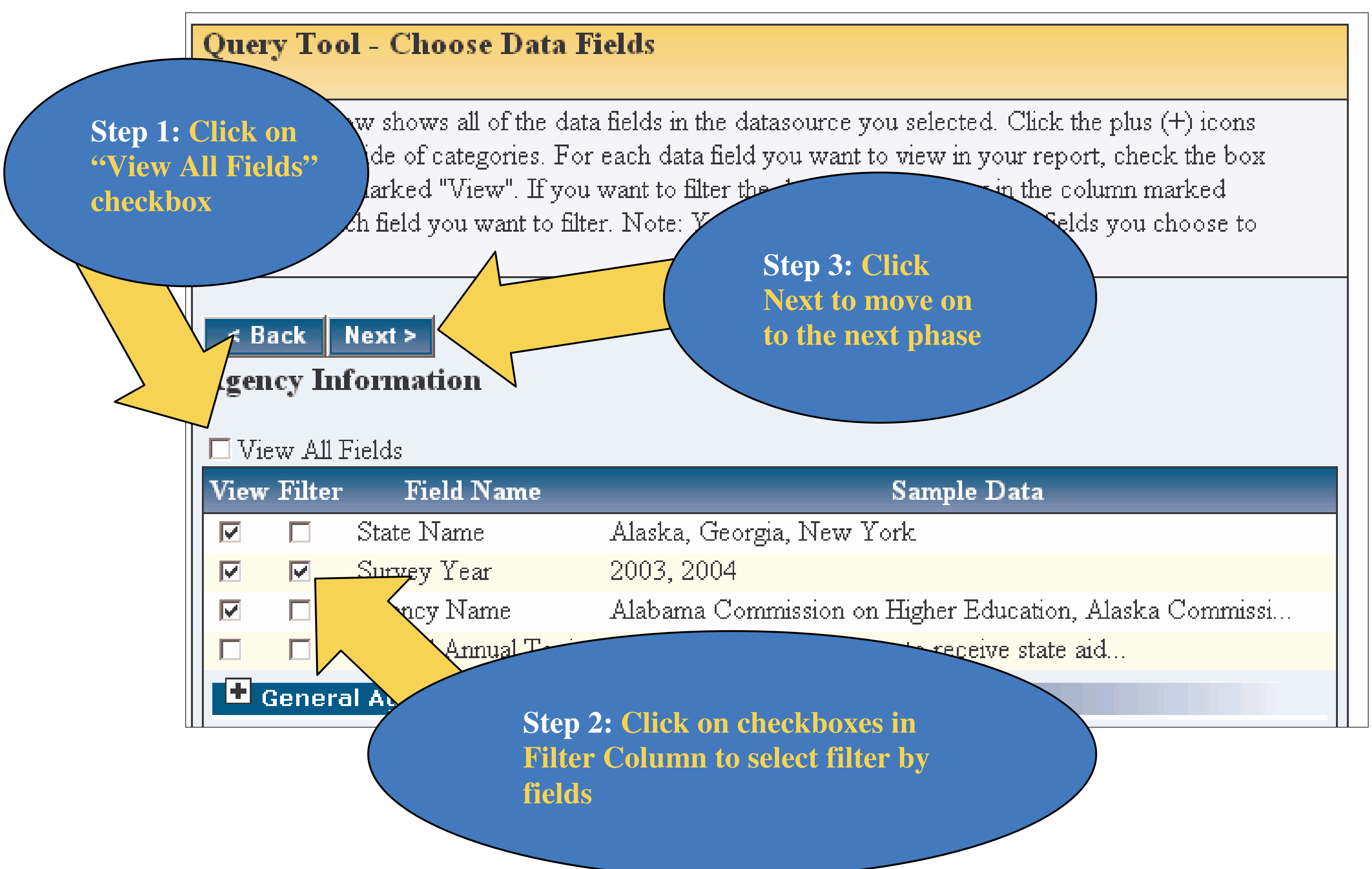
Step 3

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

Related Help Topics:

CQB Functionality

Figure 3



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.

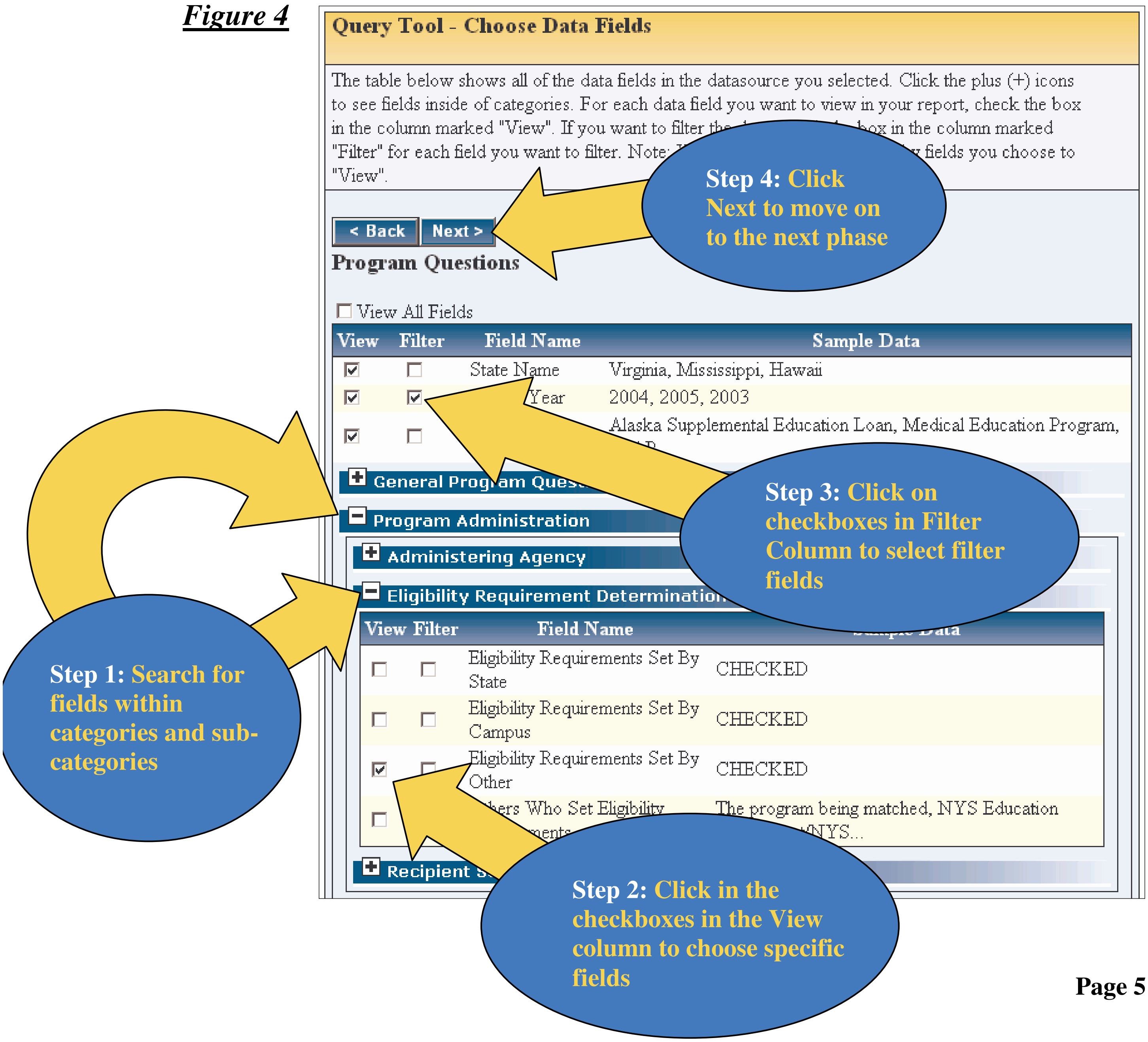
Step 4

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

Related Help Topics:

CQB Functionality

Figure 4



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”.

Related Help Topics:

CQB Functionality
Data Filtering 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.

Step 2

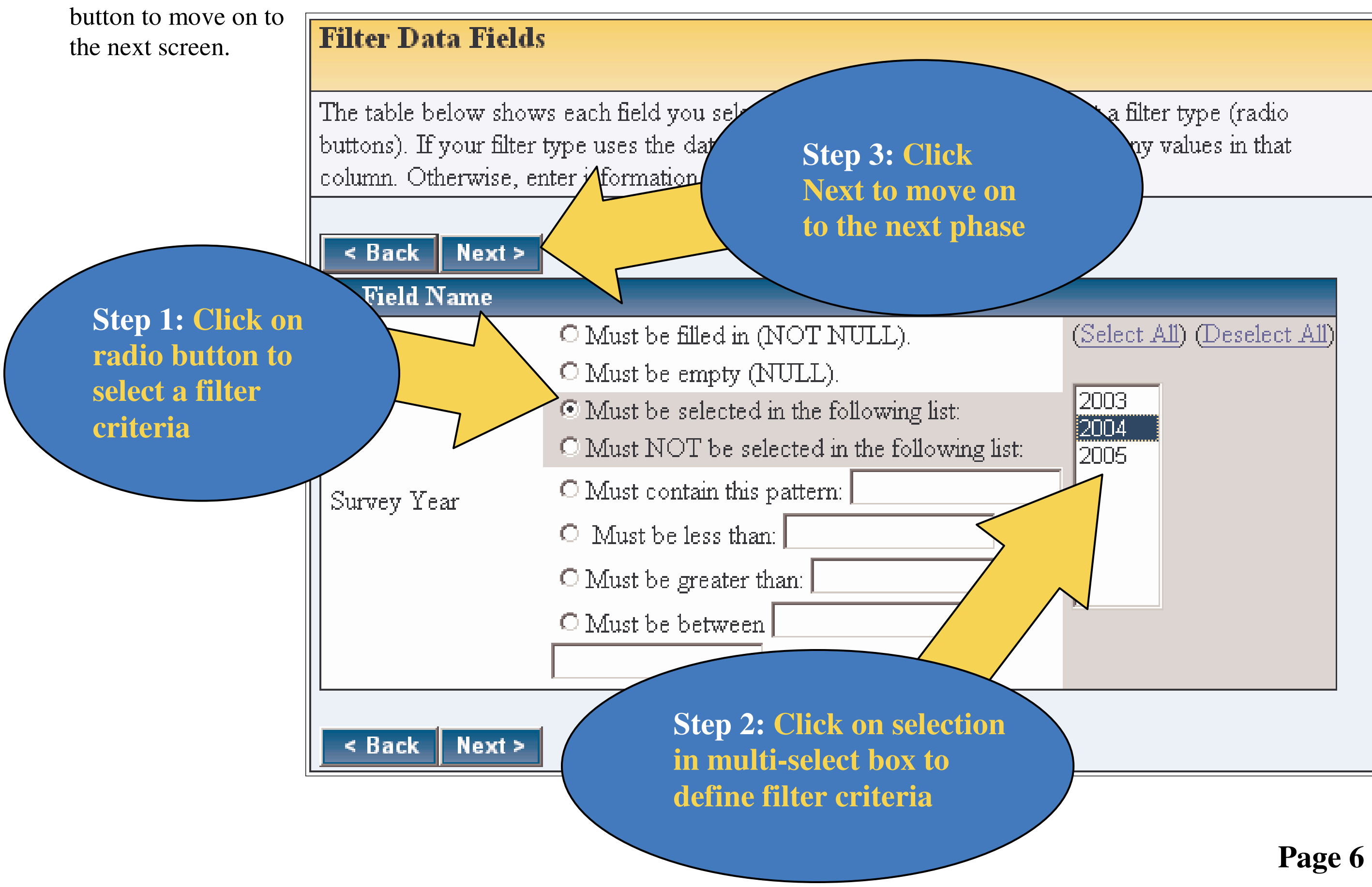
Select your criteria from the multi-selection box, in this case a year.

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



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

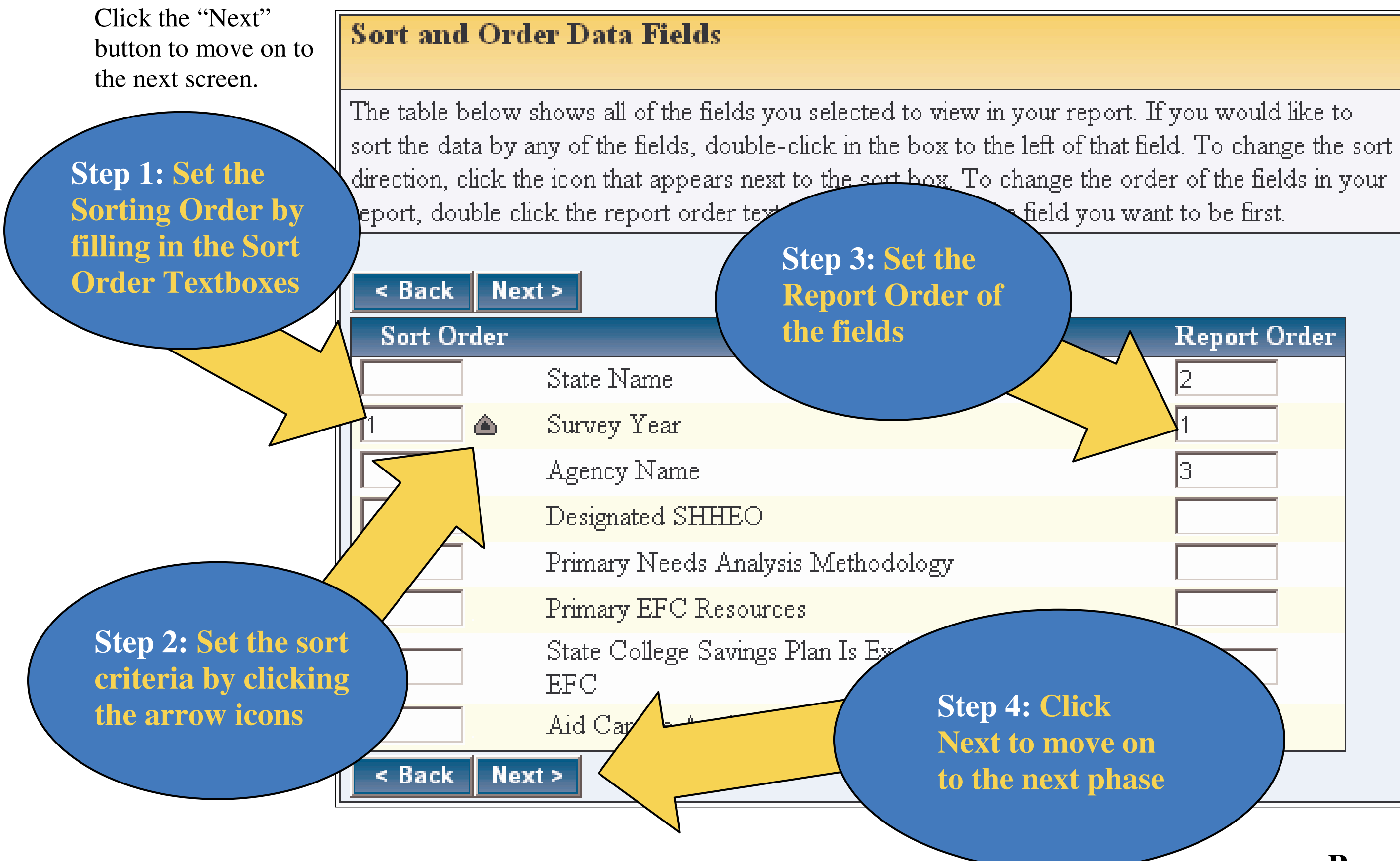
Set the report order for the chosen fields by filling in the Report Order textboxes with the appropriate order numbers. By default the report order will follow the order that the fields are displayed in if no order is set by the user.

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



***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.

Related Help Topics:

CQB Functionality
Saving Queries

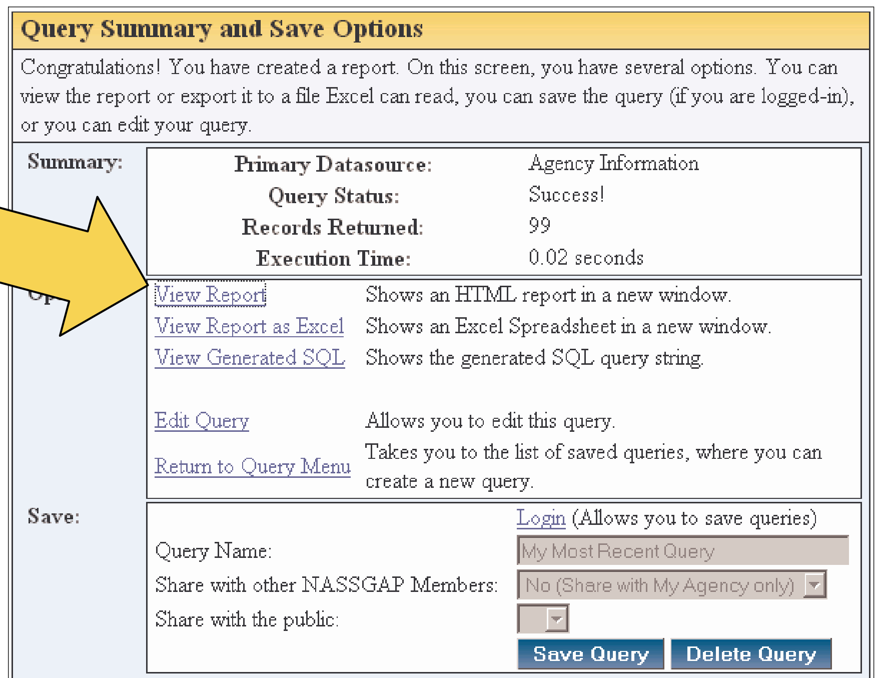
Step 1

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

Step 2

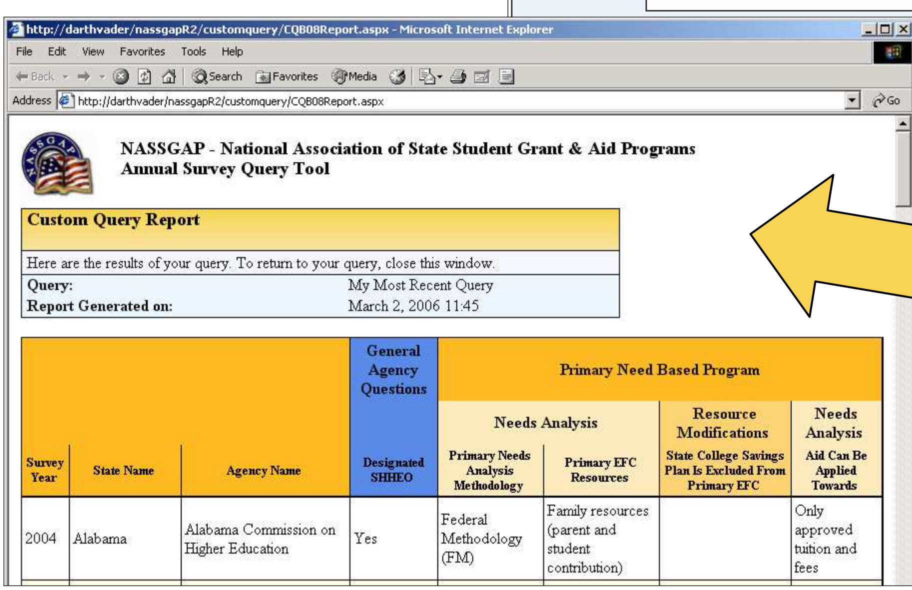
View query results (*Figure 8*)

Figure 7



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

Figure 8



Step 2: View query results in the new window