Custom Query Builder Help

Saving Queries

Help Contents

Related Help Topics:

CQB Functionality
Create a Query

Saving Queries – Synopsis

The query tool is designed to allow users to save queries for reuse and also as a means for sharing queries between users. In this document there is information discussing how to save queries, and how to set viewing permissions to allow others to access queries.
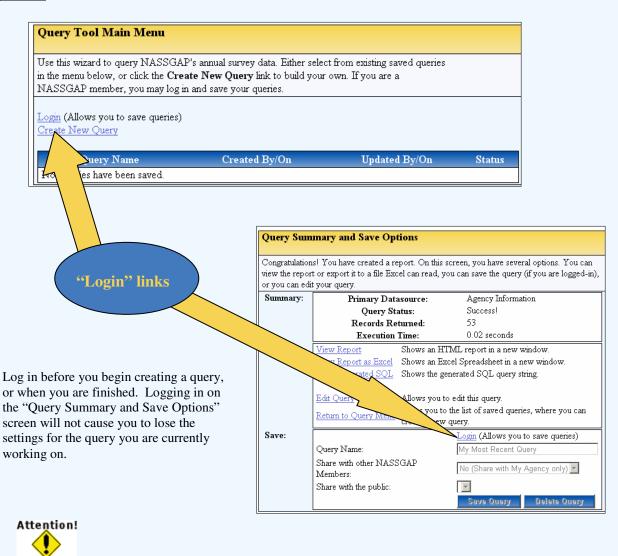
Section 1: *Saving a query*

This section focuses on the steps required to save a query.

Step 1

Users are required to log in using their Virtual Office login information in order to save queries. Users can log in on the "Query Tool Main Menu" screen or on the "Query Summary and Save Options" screen. (*See Figure 1*)

Figure 1

Log in before you begin creating a query, or when you are finished. Logging in on the "Query Summary and Save Options" screen will not cause you to lose the settings for the query you are currently working on.

Attention!

Once a user logs in the Login links disappear, if the Login links are not available it means that the user is already logged in.
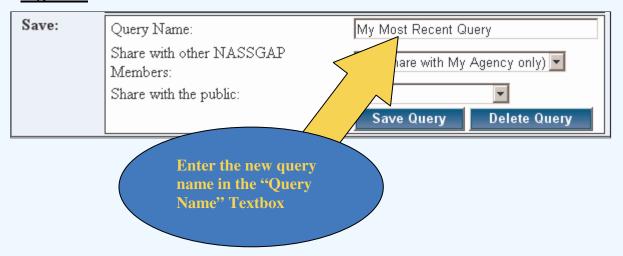
Step 2

On the "Query Summary and Save Options" screen enter a descriptive query name in the "Query Name" textbox. The default name used when a user does not explicitly name a query is "My Most Recent Query". Users should use descriptive names for queries, such as "2004 Agency Leadership Information by State", so that others can get an idea of what the query may produce for results. (*See Figure 2*)

Tip!

To make a query name descriptive the name should provide some or all of the following information, "filter criteria, information presented, and sorted by". The example, "2004 Agency Leadership Information by State", shows that the query presents information from 2004 about Agency Leadership Information ordered by State.

Figure 2

Enter the new query name in the "Query Name" Textbox

CAUTION

It is possible for two queries to be saved with the same name. Try to avoid this by giving your queries meaningful names. If two queries are saved with the same name consult the "Created By/On" information on the "Query Tool Main Menu" screen for help in determining which query to use.
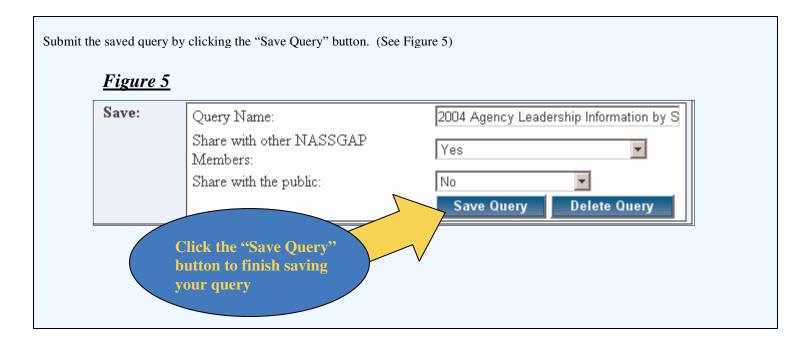
Step 3

On the "Query Summary and Save Options" screen choose whether you would like to share your query with all NASSGAP members. The options listed in the "Share with other NASSGAP Member" dropdown menu are <Yes> and <No Share with My Agency only>. (*See Figure 3*) –For more information on sharing queries see the section 2 of this document

Figure 3

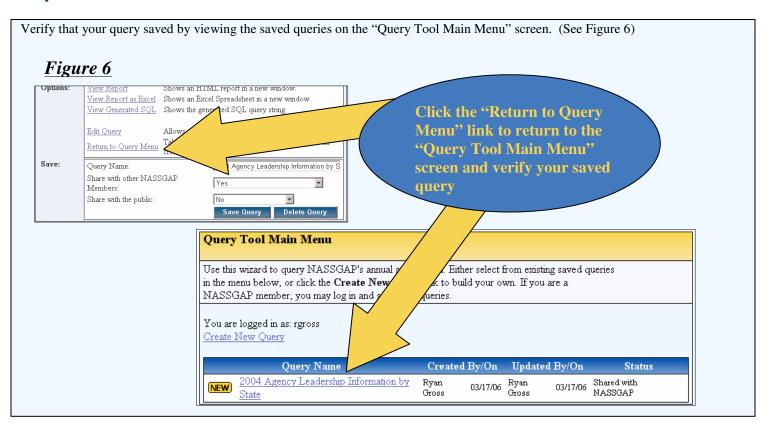Choose whether to share your query with other NASSGAP members

Step 4

On the "Query Summary and Save Options" screen choose whether you would like to shore your query with public users. The options in this list depend on a user's security permission level. Level 1 and 2 users have the following choices <Yes>, <Yes, Pending Approval>, and <No>. All other security levels have the following choices <Yes, Pending Approval>, and <No>. All public queries require administrator approval. (See Figure 4) - For more information on sharing queries see the section 2 of this document

Figure 4

Choose whether to make your query available to the public

Custom Query Builder Help

Step 5

Submit the saved query by clicking the "Save Query" button. (See Figure 5)

Figure 5

Click the "Save Query" button to finish saving your query

Step 6

Verify that your query saved by viewing the saved queries on the "Query Tool Main Menu" screen. (See Figure 6)

Figure 6

Click the "Return to Query Menu" link to return to the "Query Tool Main Menu" screen and verify your saved query

Section 2: *Who can view my Saved Query?*

This section focuses on sharing saved queries. It is intended to provide a better understanding of the settings associated with sharing queries.

Figure 7 is a table laying out who has the privilege to view a query based on the user defined settings for sharing the query. The two rows marked as "Settings" show the possible combinations of settings for the "Share with other NASSGAP Members" textbox and the "Share with the public" textbox. The bottom row marked as "Results" shows who will be able to view a query based on the combination of settings within the same column.

Figure 7

Query Sharing Setting Combinations							
Settings	**Share with other NASSGAP Members:**	Yes	Yes	Yes	No (Share with My Agency only)	No (Share with My Agency only)	No (Share with My Agency only)
	Share with the public:	Yes	Yes, Pending Approval	No	Yes	Yes, Pending Approval	No
Results	**Who has access to my Query?**	All users Public & NASSGAP	All NASSGAP users. All Public users upon approval by administrator.	All NASSGAP	System will alert user of illegal choices	System will alert user of illegal choices	User's Agency