Slate 103

A How-To Guide for:

- Using and Creating Queries

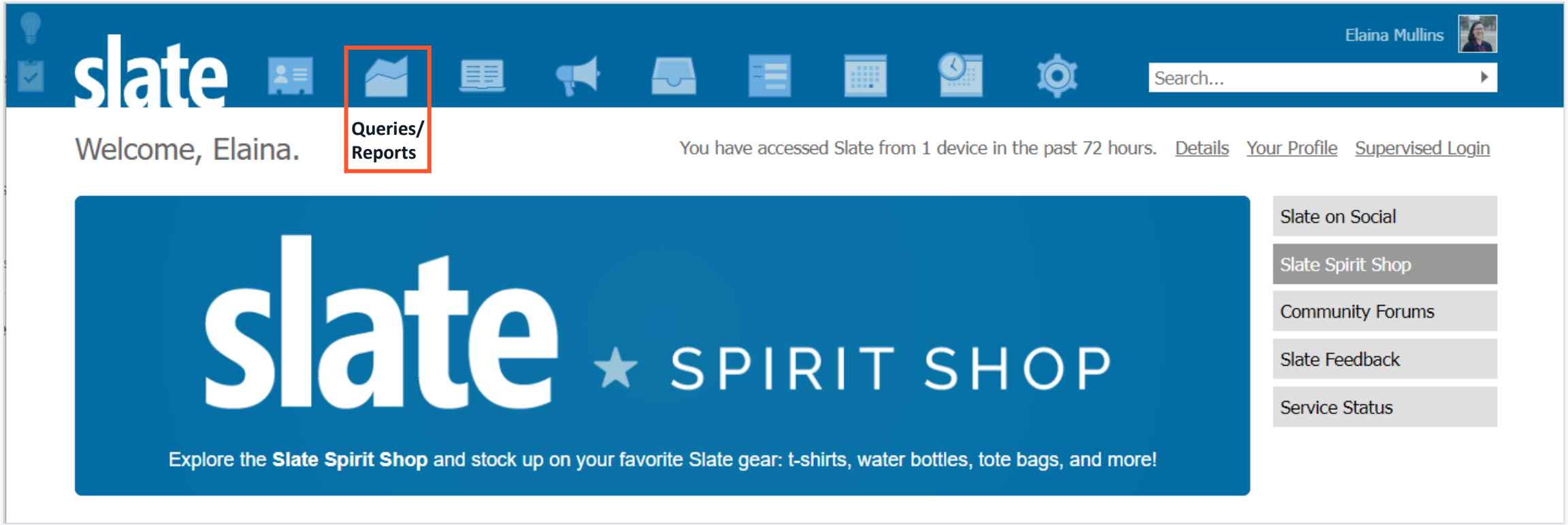
Graduate College

Menu

- Using Queries
- Creating Standard Queries
- Creating Configurable Joins Queries

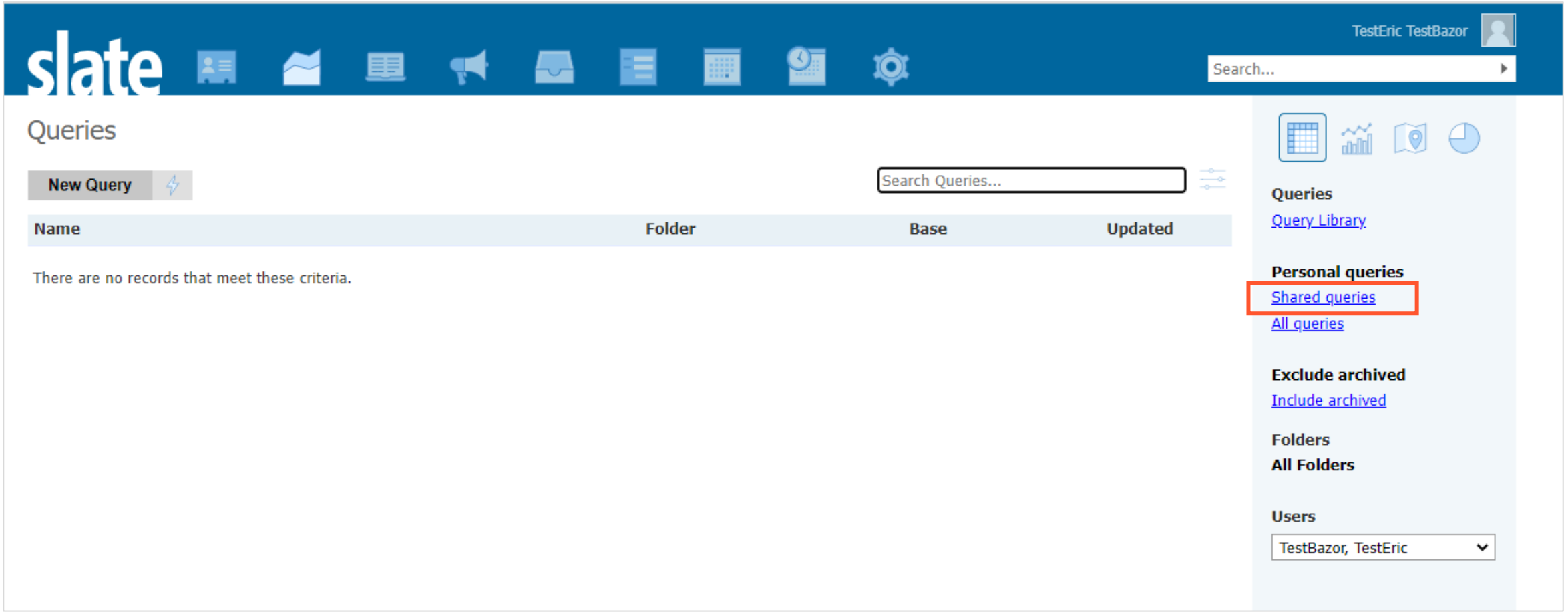
Using Queries

- Click on the **Queries/Reports** icon at the top of the page



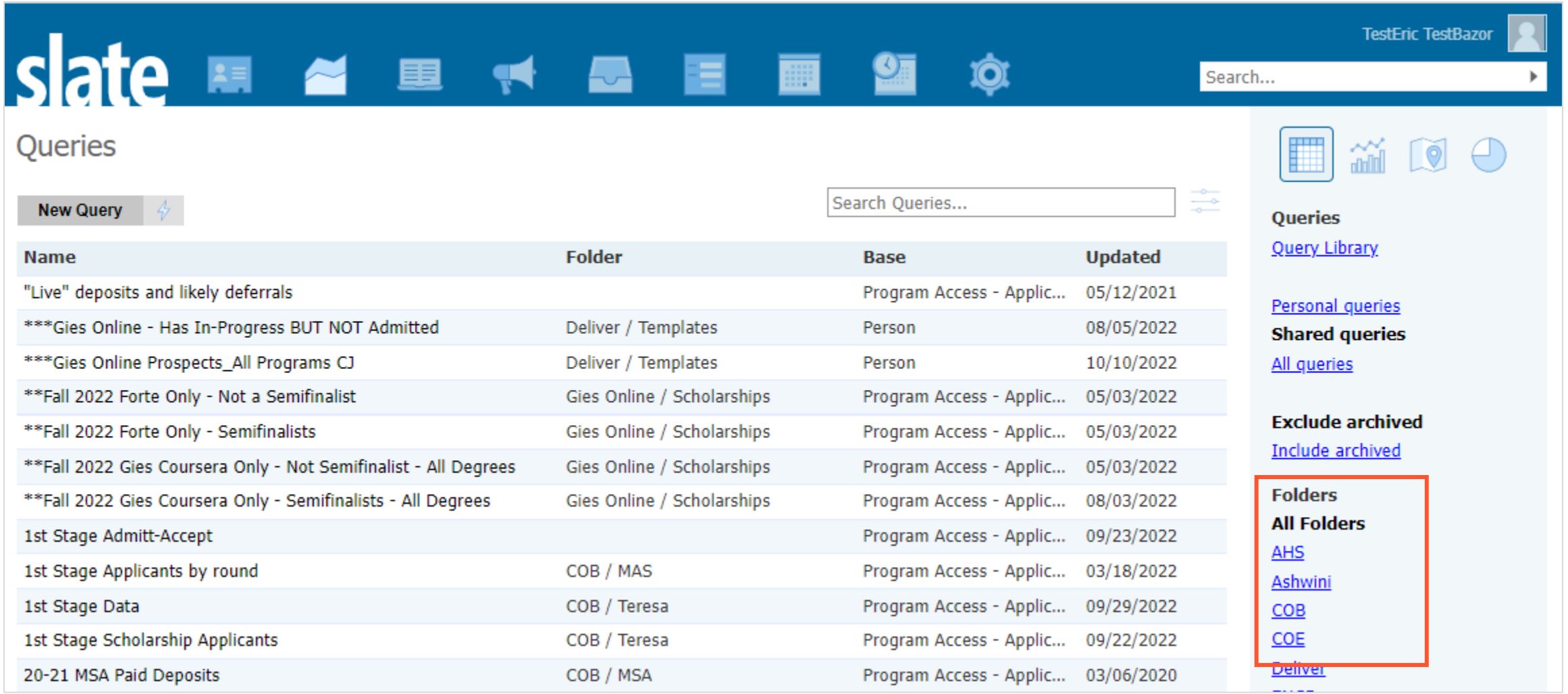
Using Queries

- Default setting shows your **Personal queries** (anything you have made); click the **Shared queries** link to see all shared queries



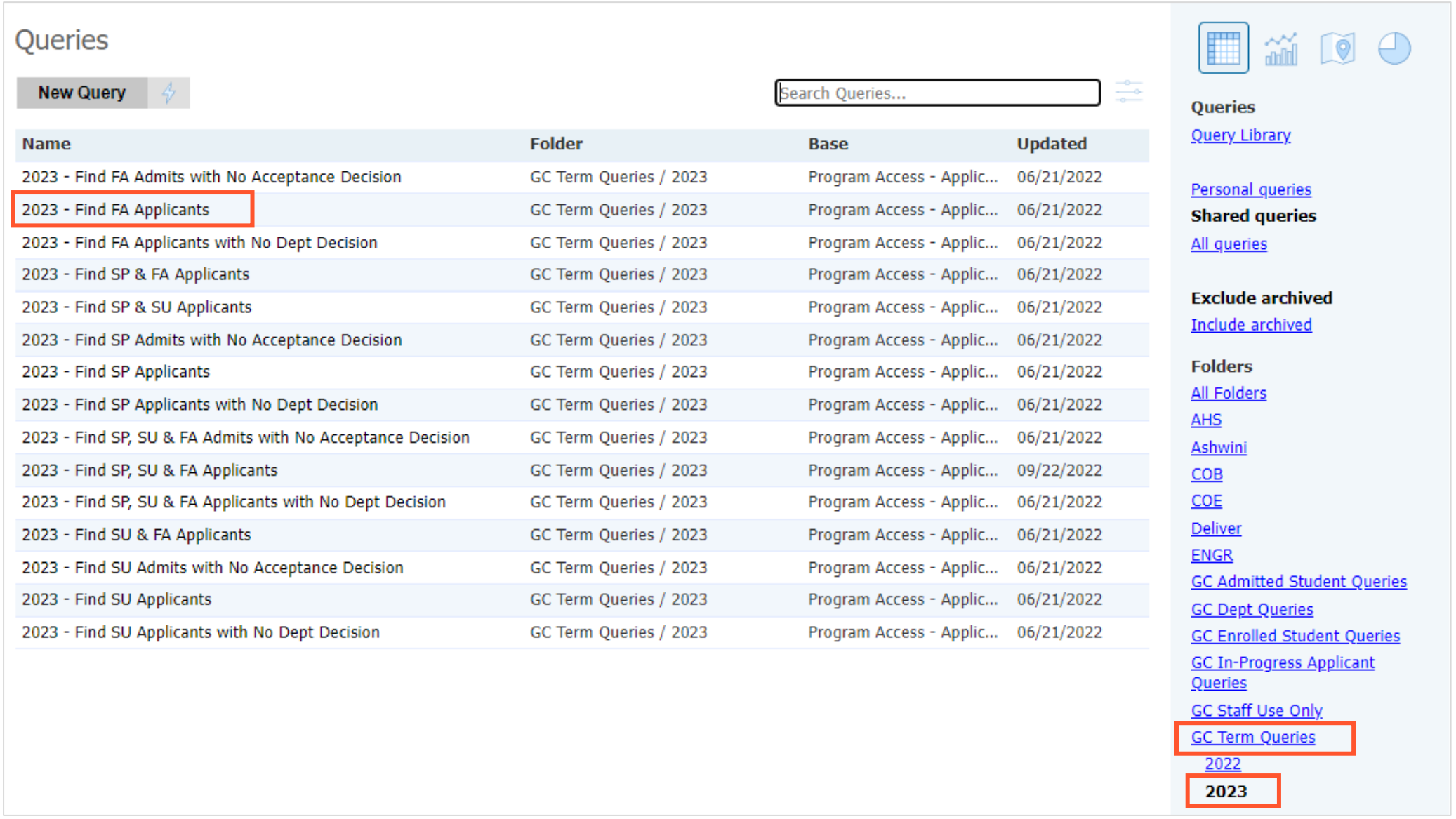
Using Queries

- Use the **Folder Navigation** to access other queries

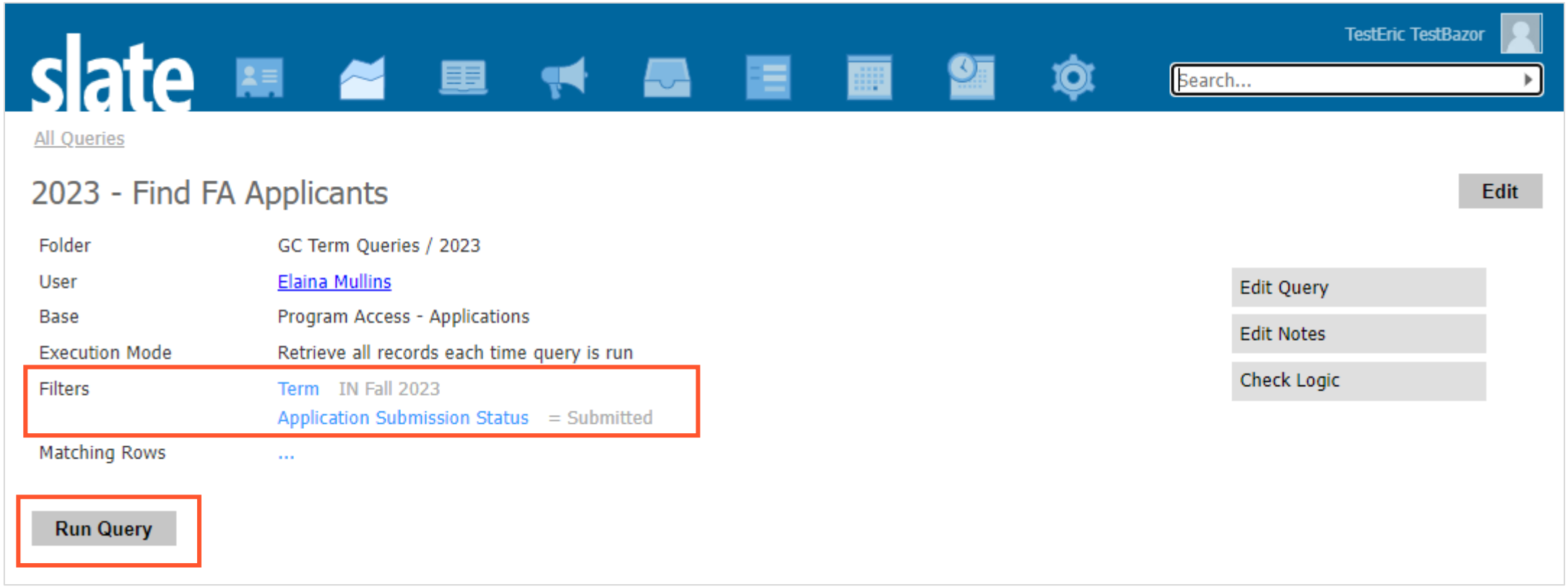


- Click on the name of a query to access and run the query

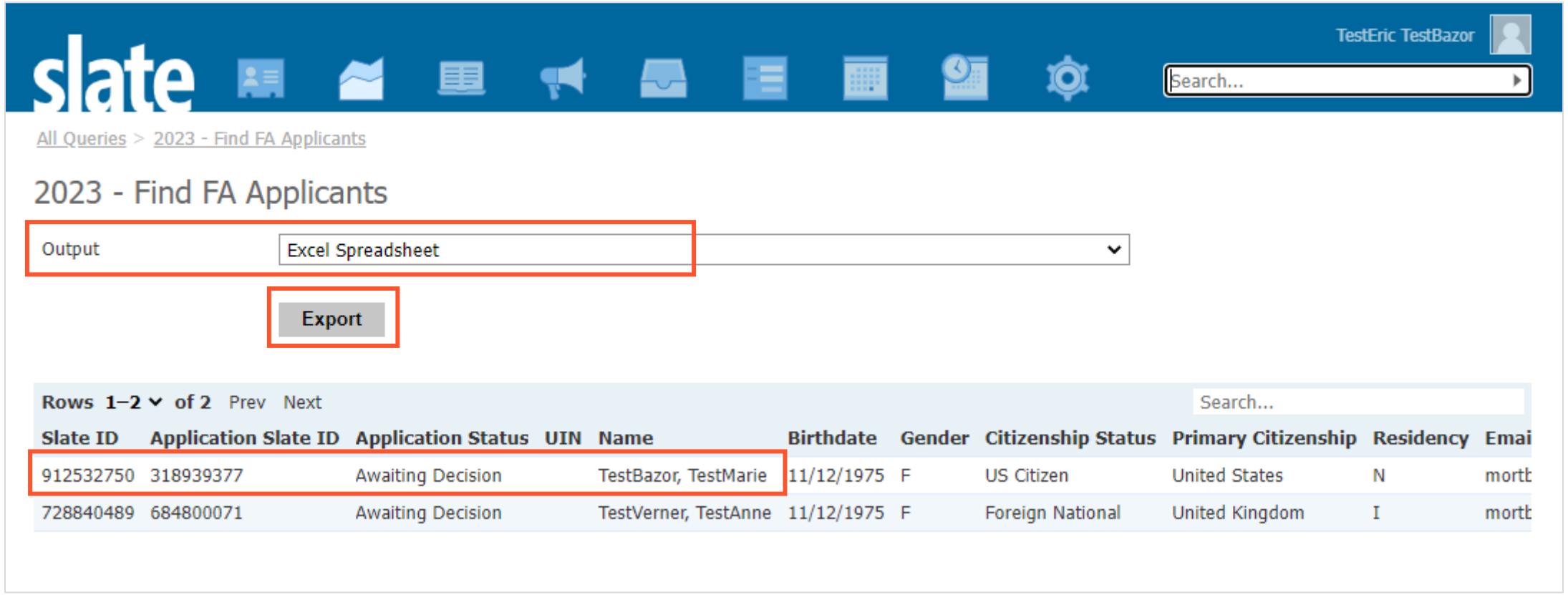
Please do not edit any shared queries created for all-department use



- Check **Filters** from this main menu page to see which records the query is pulling
- Click **Run Query** to view and export results
- **Note:** Query may run more slowly if pulling large amounts of records



- **Output Menu** defaults to “Excel Spreadsheet”, but can be changed for other actions
- Click **Export** to download spreadsheet or perform selected Output action
- Click on **record row** to view full results or open record



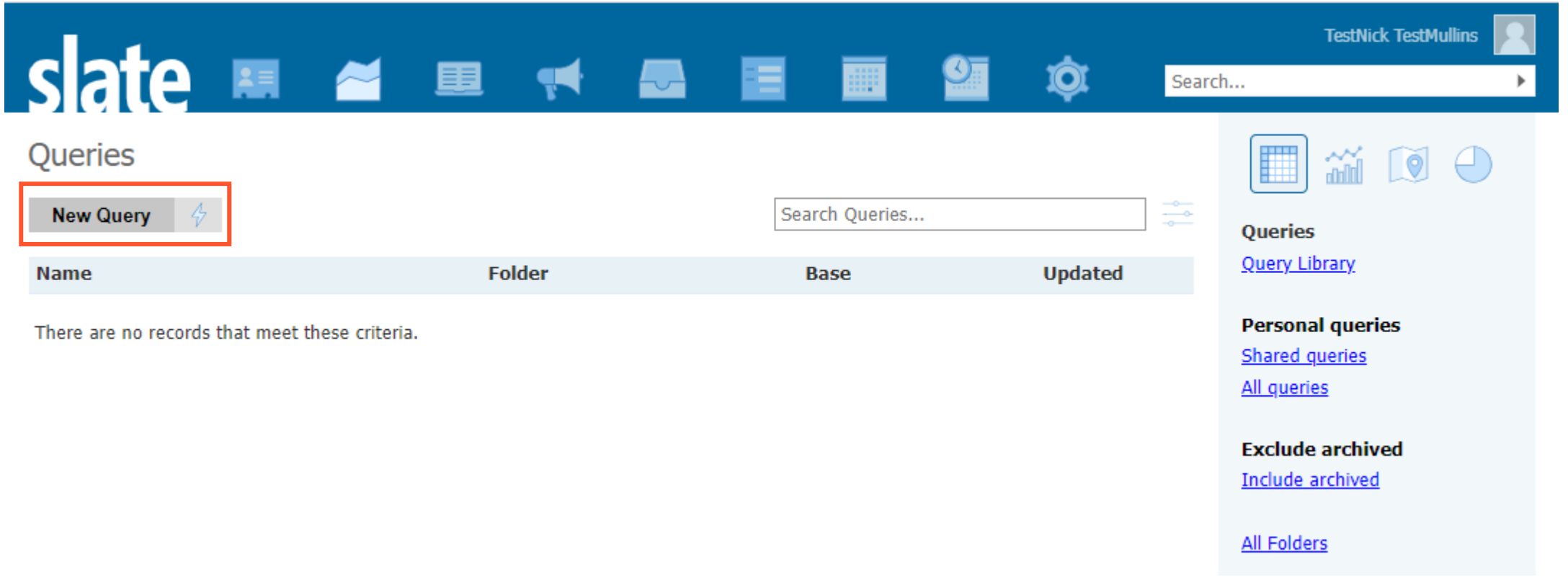
Using Queries - Reminders

- You may have access to other departments' queries – be respectful, ***do not edit queries that do not belong to you or your department***
- You can perform various actions from the Results page:
  - Excel/CSV/Application PDF downloads
  - Bulk move applications to bin
  - Batch input deny decisions
  - Open Slate record
- Queries for all-department use will be saved in folders beginning with "GC…":
  - GC Admitted Student Queries
  - GC Enrolled Student Queries
  - GC Term Queries

Return to Menu

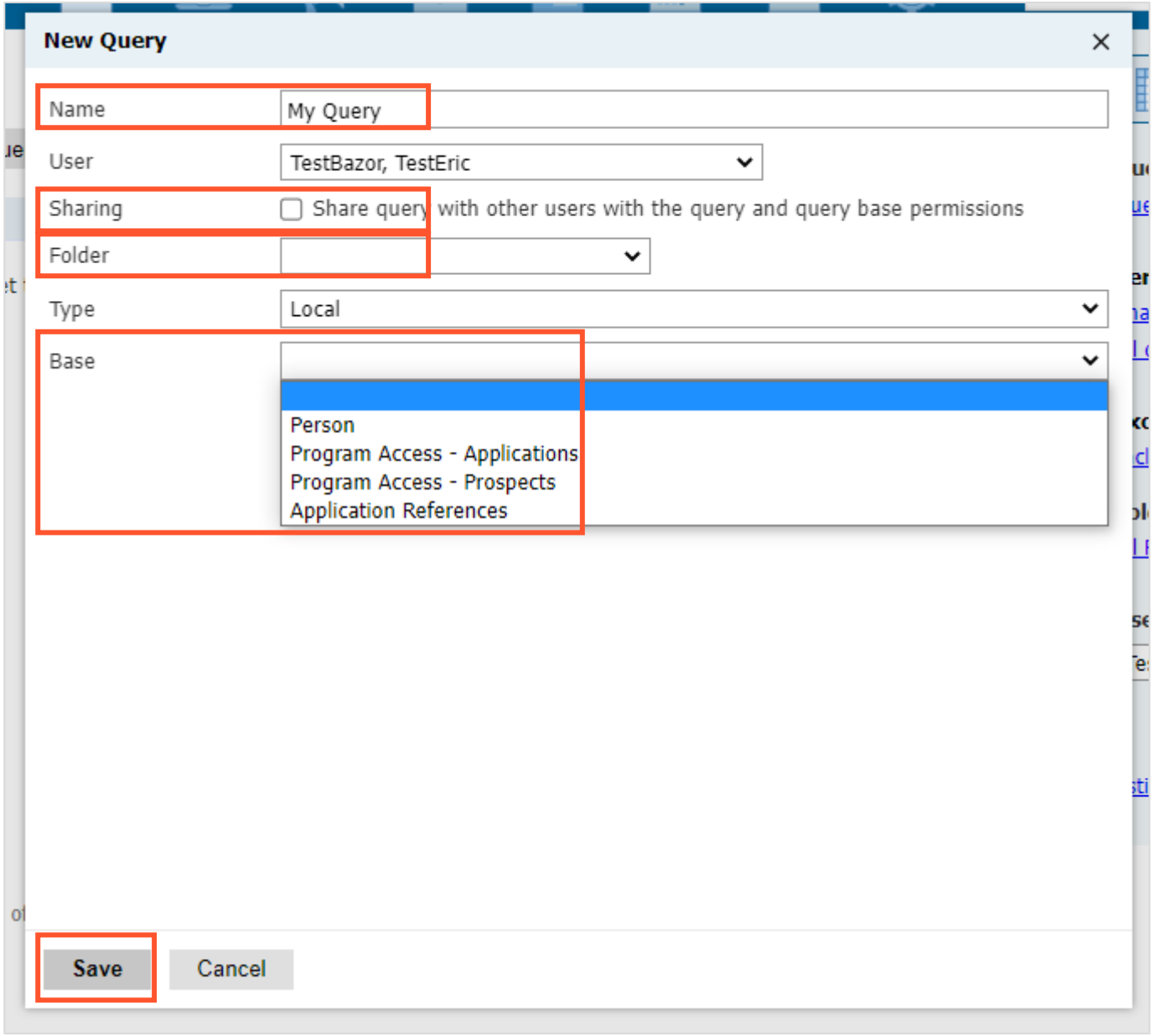
Creating Standard Queries

- Click on **New Query** or **(quick query icon)** to create a query
- **New Query** allows you to name, share, and save in specific folder
- **(quick query icon)** allows you to quickly create a query without naming/saving



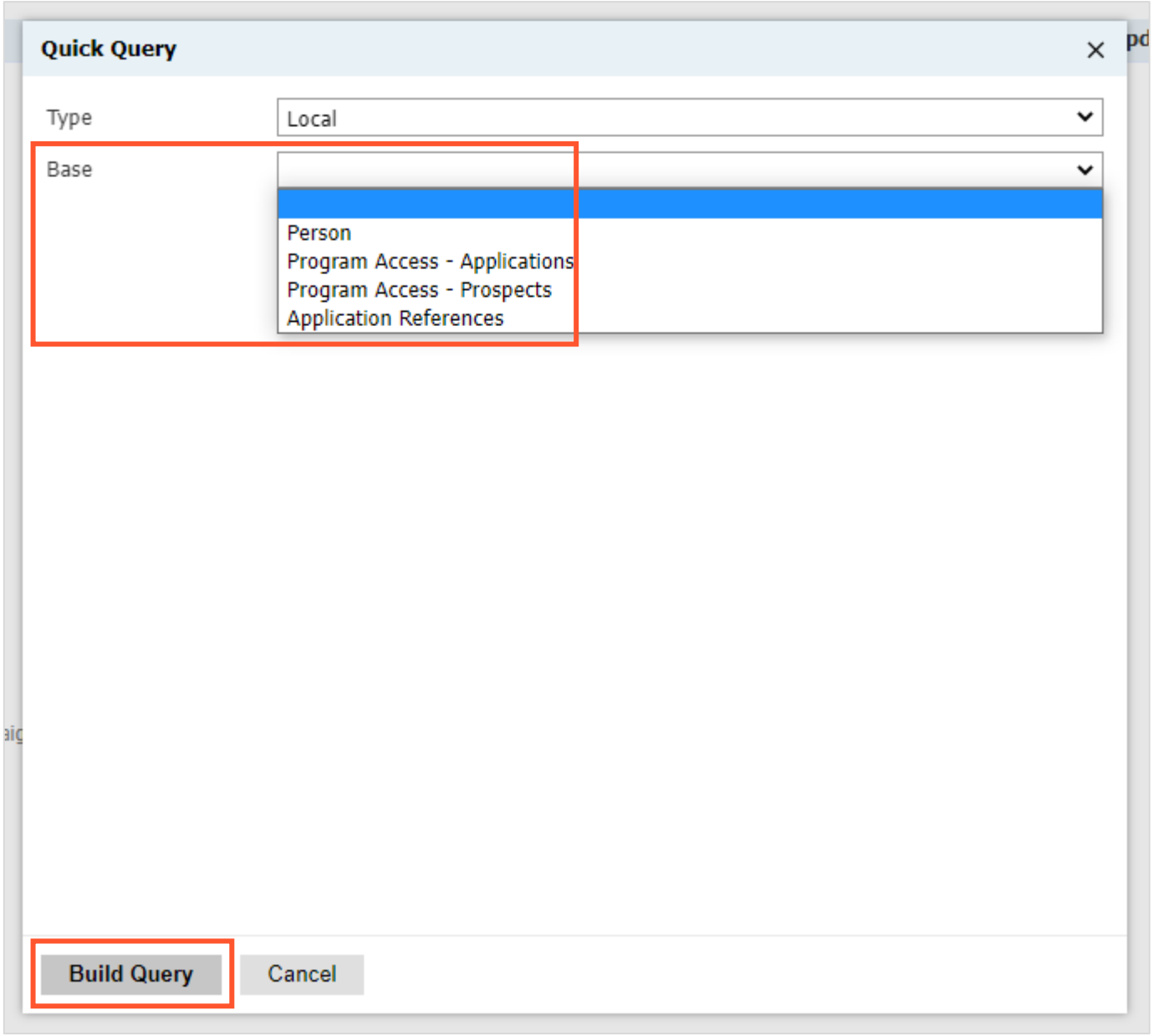
New Query

- **Name** query
- Check the **Share** box to allow others to see this query
- Select **Folder** (choose your department folder from GC Dept Queries)
- Choose **Base**:
  - **Person and Program Access-Prospects** to find prospect records or records in general (with or without applications)
  - **Program Access – Applications** to find applicants
- Click **Save**



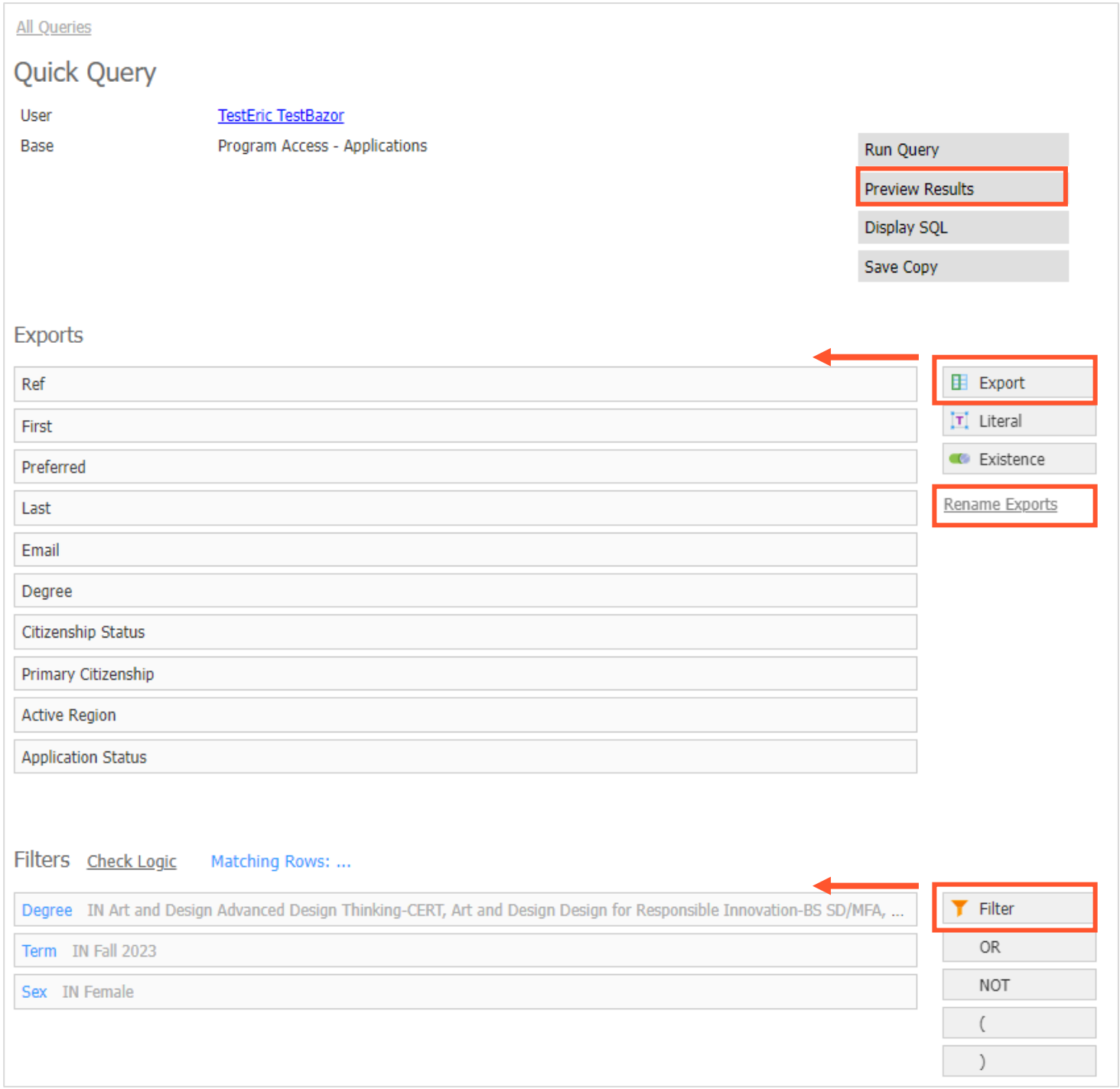
Quick Query

- Choose **Base**:
  - **Person and Program Access-Prospects** to find prospect records or records in general (with or without applications)
  - **Program Access – Applications** to find applicants
- Click **Build Query**



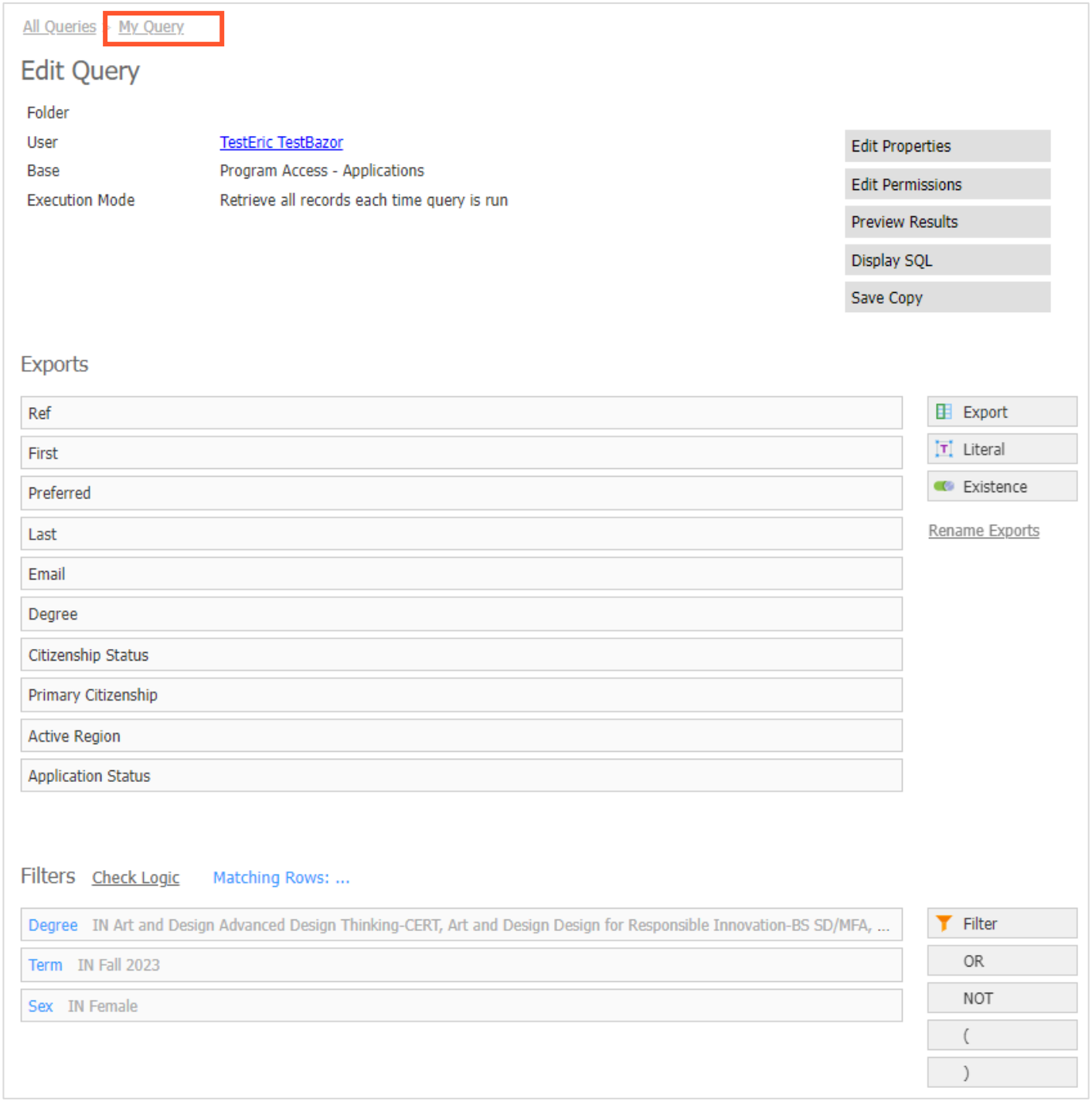
Build the Query

- Add **Filters** to specify which records you want to find
- Add **Exports** to see information about these records
- Rename exports by clicking the **Rename Exports** link (change “Ref” to “Slate ID”, for example)
- Click **Preview Results** to view a snapshot of the results



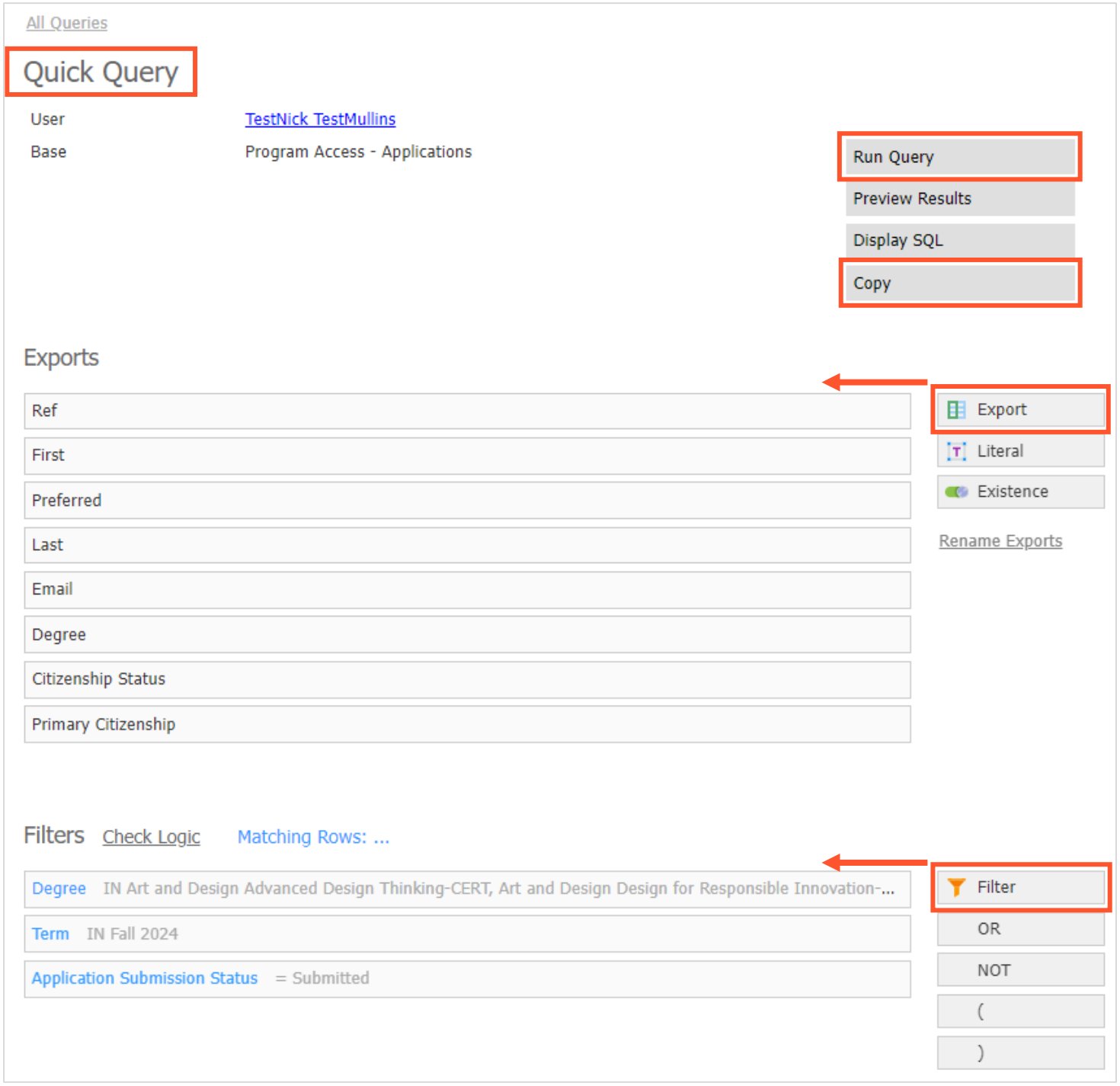
Run the Query

- If a **New Query**
  - Click the name of your query in the breadcrumb links at the top of the page to return to the main menu
  - Click **Run Query**



- If a **Quick Query**
  - Click **Run Query** to run the query

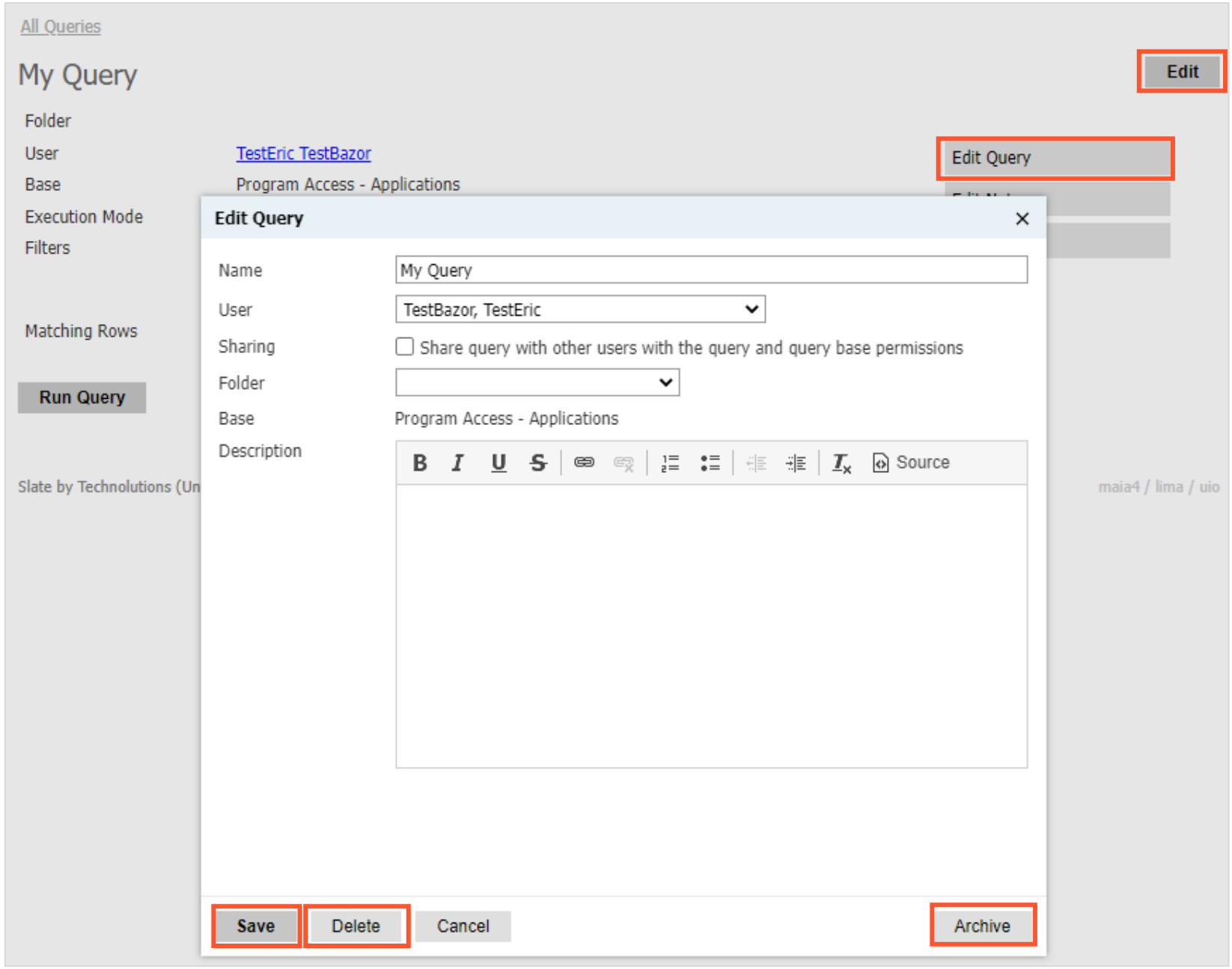
Note: To save a **Quick Query** as a permanent query click **Copy**



Edit the Query

Saved queries can be edited at any time

- **Edit:** change the name, folder, or Share setting; Delete or Archive
- **Archive:** archive the query and clear it from your folder view
- **Delete:** delete the query (cannot be recovered)
- **Edit Query:** change exports and filters (changes saved immediately)



Creating Configurable Joins Queries

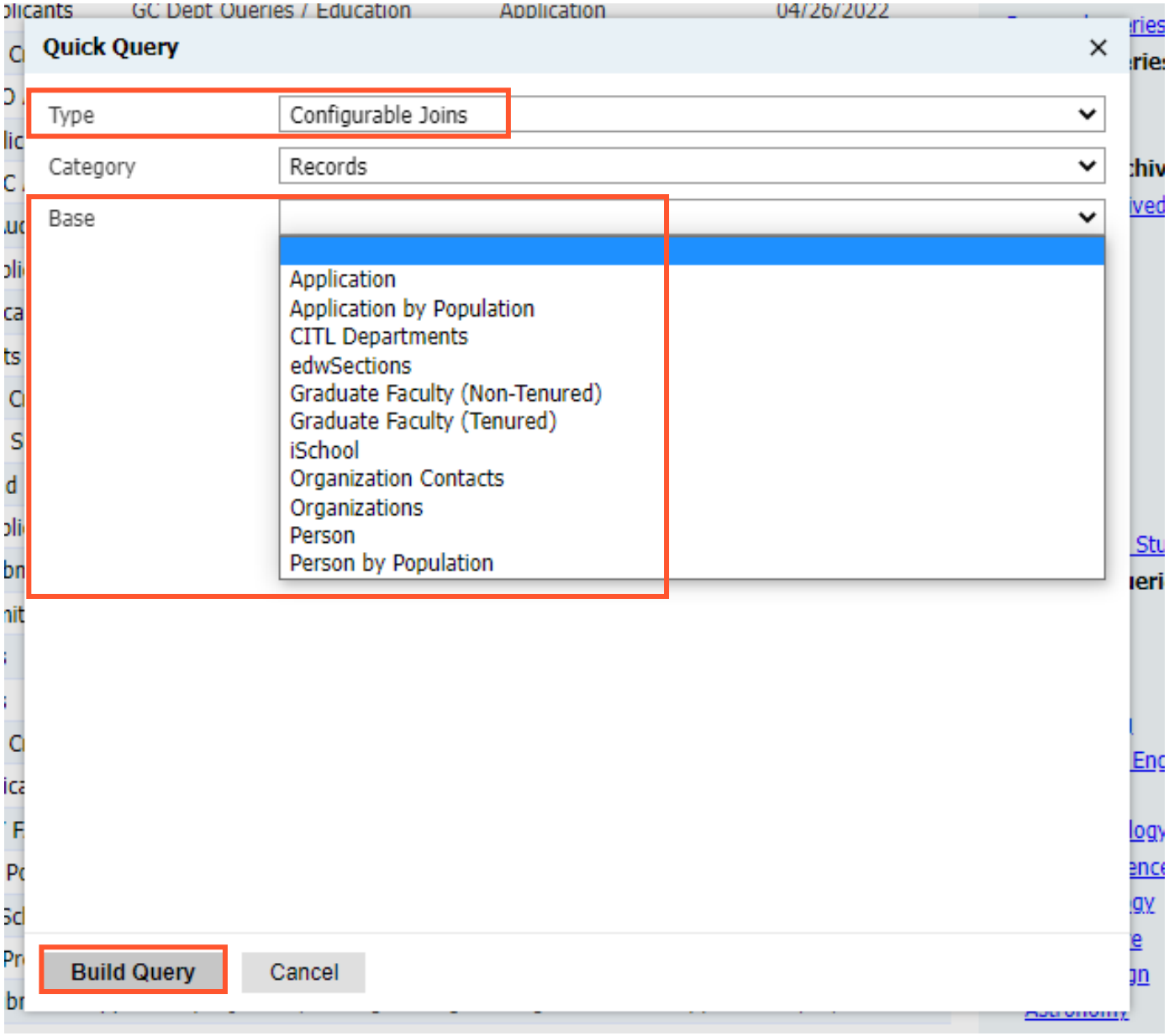
Configurable Joins (CJ) queries are very similar to standard queries, but there are some marked differences:

- Start with only one Base (Application, Person, etc.) that contains filters/exports related to that base and **must** join to other bases to access other filters/exports
- Choose from more bases than standard queries
- Join to bases that are not accessible using standard queries
- Utilize subquery filters and subquery exports for more comprehensive queries
- Must specify your program/degree in filters (also helps query run more efficiently)

CJ queries are very powerful, but there is a learning curve! View the Slate Knowledge Base article here for more information about using CJ queries.

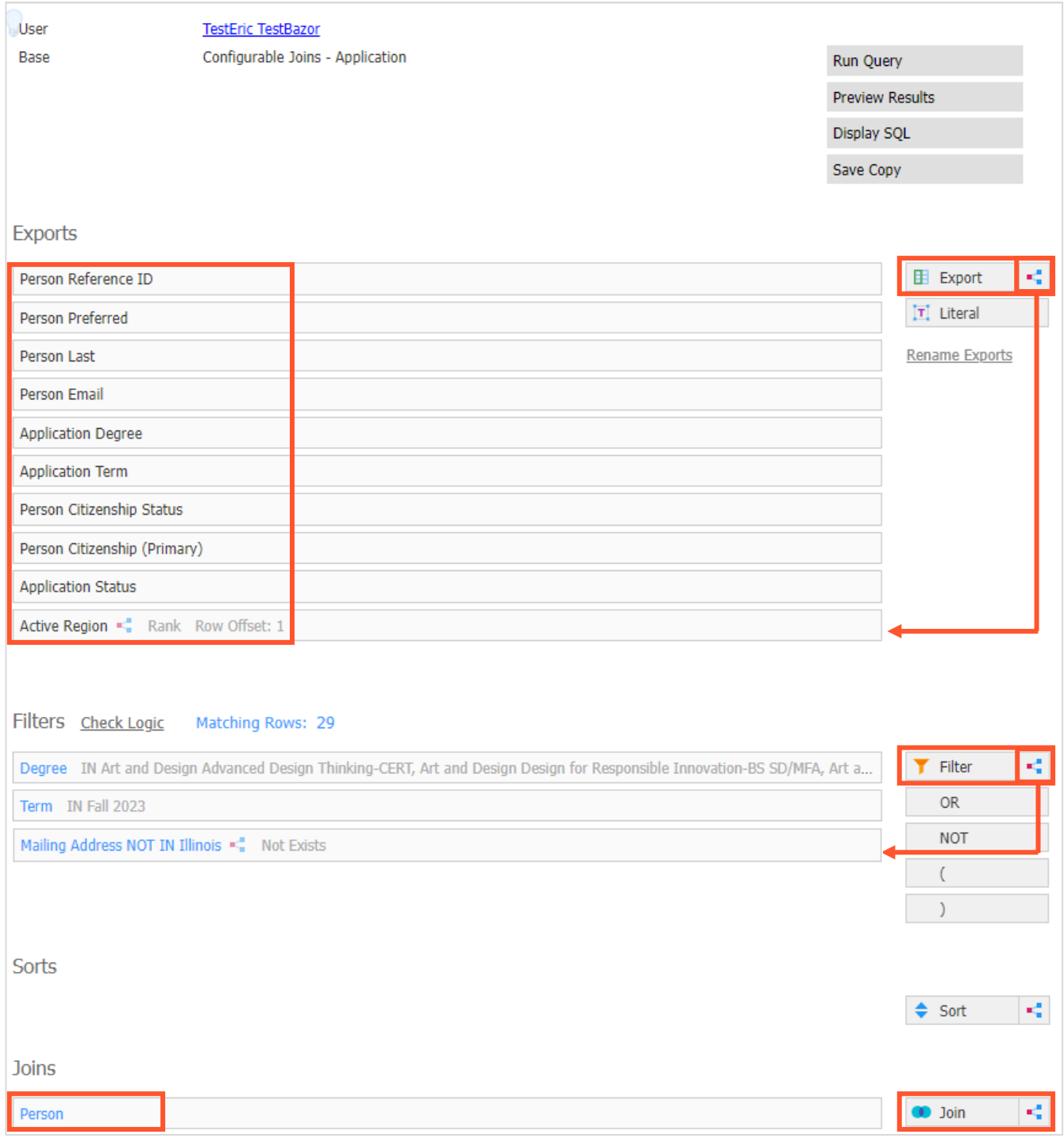
New CJ Query

- After creating query change **Type** to **Configurable Joins**
- Choose starting **Base**
- Click **Build Query** (quick queries) or **Save** (new queries)



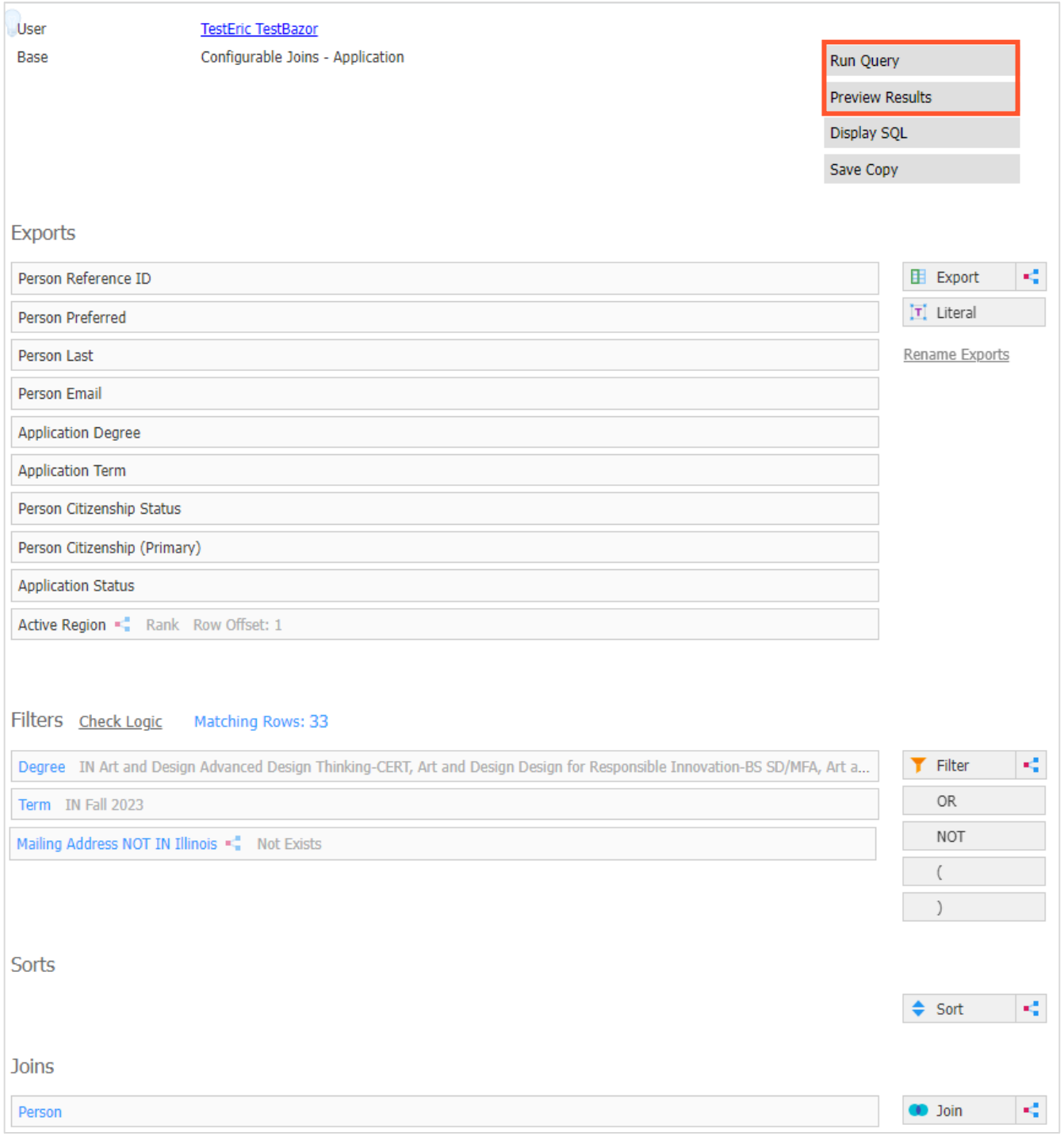
Build the CJ Query

- **Join** to other Bases to access those Exports and Filters
  - Join to Bases that have a one-to-one relationship with starting Base (those that **do not** have the subquery icon next to them)
- Add **Filters** and **Exports** as normal (export names begin with the Base they come from)
- Add **Subquery Exports** and **Subquery Filters**
  - Join to Bases that have a one-to-many relationship with starting Base (those that **have** the subquery icon next to them)



Run the CJ Query

- Click **Preview Results** to view a snapshot of results
- Click **Run Query** (quick queries) or return to the main menu and click **Run Query** (new queries) to run the CJ query
- View and interact with results as normal



Creating Queries – Tips and Reminders

- **It is recommended to only use CJ queries. The standard query bases will be phased out in the future and no longer work after that time**

- Queries results pull **one row per *base item*** (person base = 1 row per person, application base = 1 row per application, etc.)
- CJ queries **start with one base**, and you must join to other bases to access additional filters and exports
- **Almost all fields** in Slate can be used as either an export or filter
- **Finding the exports and filters** you want is the trickiest part of building queries (the names of the fields don't always make sense) – contact the Graduate College for assistance in finding field names

Creating Queries – Reminders, continued

- **Queries you share** are visible to all other users – use Folders to save your departmental queries in one place
- You can **edit** the name, folder, and share setting of your queries at any time
- You can **delete** old or unused queries – Careful! Deleted queries cannot be recovered
- You can **archive** old or unused queries – Archived queries are accessible by clicking the “Include Archived” link above Folders list