

# Slate Queries Documentation



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<https://www.vanderbilt.edu/aapsi/documentation/slate.php>

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# Queries

## Navigating the Queries Page

The main query page will show you a list of your personal queries. The menu on the right will allow you to navigate through the various folders that have been created. You can choose to toggle between Personal Queries and “Include Shared Queries”.

The folders list will allow you to filter the query list that you see. Clicking on a specific folder will show you the queries that are saved under that folder.

## Starting a Query

You have two options for creating a new query. “New Query” will prompt you to give the query a name and save it prior to starting. These would be queries that you plan on running in the future. “Quick Query” will not prompt you to name or save the query and instead allows you to start right away. This would be if you want to put together something quickly that you may not run in the future. You can always save your quick query afterwards.

## New Query

Click on the “New Query” button and complete the required items.

**New Query**

Name: Training Query

User: Donoso, David

Sharing:  Share query with other users with the query and query base permissions

Folder: Other / Training

Base: Applications

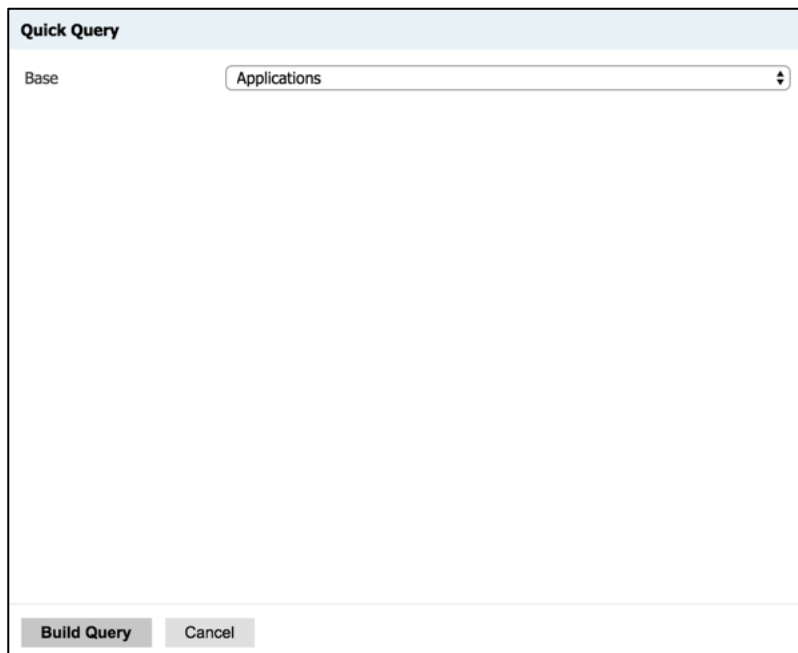
Save Cancel

- Name
- Sharing: If you want this query to be visible by other users with query access. You can give individual permissions from within the query.
- Folder: Choose an existing folder to save this query under, or create a new one. To create a new folder, you would choose “Other” from the dropdown. Another box will appear where you will enter the folder name. Once you create a folder, it will become available in the dropdown for future use. You can also create sub-folders by following the same method.
- Base: This is the type of population you want to query on.
  - a. Prospects: All person records. Each person record will appear as a single row in the query results.
  - b. Applications: All applications will appear as a single row in the query results. Records that have multiple applications will appear multiple times in the query results, with each row representing a distinct application for that record.

Click “Save” to continue.

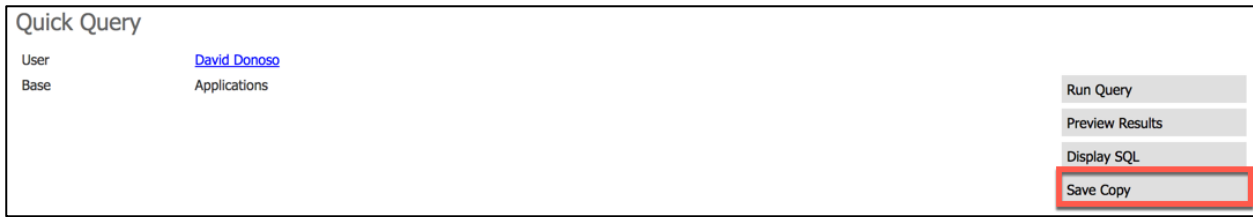
### Quick Query

Click the “Quick Query” button and select your base. Click “Build Query” to continue.



The image shows a dialog box titled "Quick Query". Inside the dialog, there is a label "Base" followed by a dropdown menu that currently displays "Applications". At the bottom of the dialog, there are two buttons: "Build Query" and "Cancel".

If you want to save your quick query, click on “Save Copy” and add the required items.



## Building your Query

In all queries, you will see three sections: Exports, Filters, Sort Keys.

Exports: These are the data items you want to pull. Think of these as your column headers in a spreadsheet.

- Person level examples: First Name, Last Name, Date of Birth
- Application level examples: Program, Degree, Application Term

Filters: This is what allows you to narrow down the results in the query. Think of this as selecting your rows in a spreadsheet.

- Person level examples: Records who are male/female, age, citizenship.
- Application level examples: Applications for a specific program, degree or term

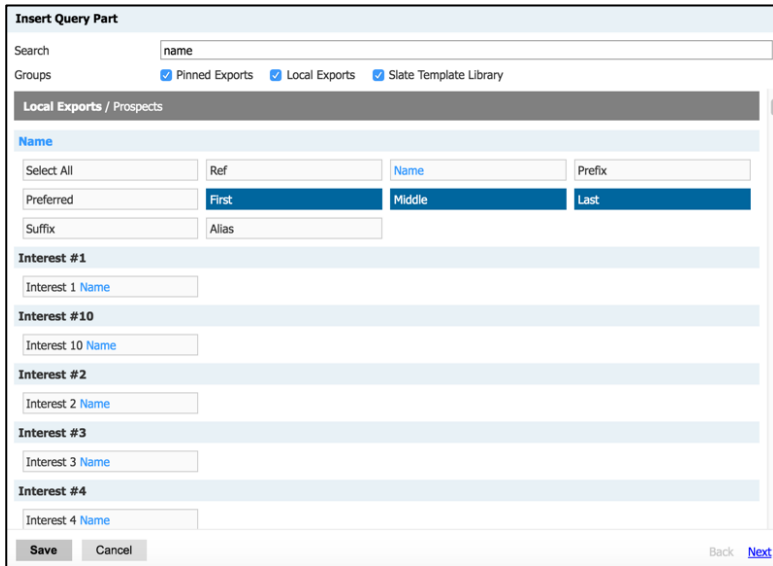
Sort Keys: This is what allows you to choose how to sort your query results. You will be able to choose from the various exports you have added to the query and can create multiple levels. For example, you want to sort results by last name then first name.

## Exports

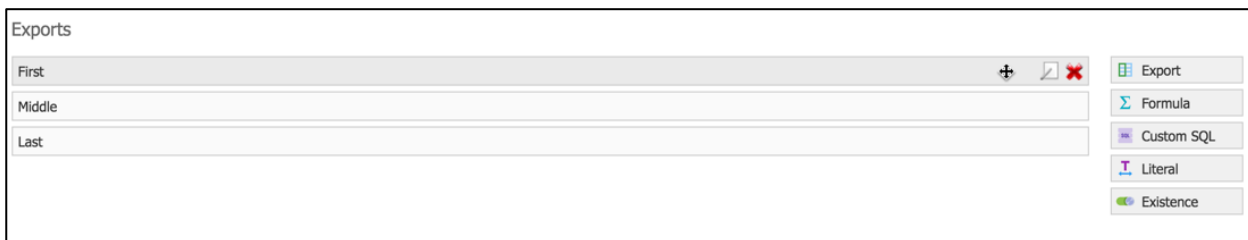
To add an export, click or drag the “Export” button found on the right. This will open a search window that will allow you to search for all the fields in the system that have been made available for queries.



Fields are typically organized into various groups, but it's easiest to start searching for a specific field. You can add multiple exports at one time by clicking on each of the boxes. In the example below, I searched for "Name" and selected First, Middle, Last to add to my query.

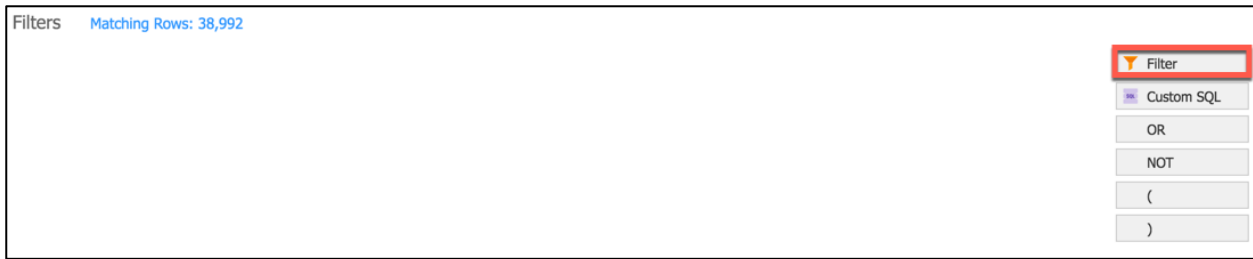


Once you are done selecting your exports, click Save. You will see your exports appear under the section in the query. To add more exports, follow the same steps. To remove exports, hover over the export you want to remove and click on the red X that appears on the right.

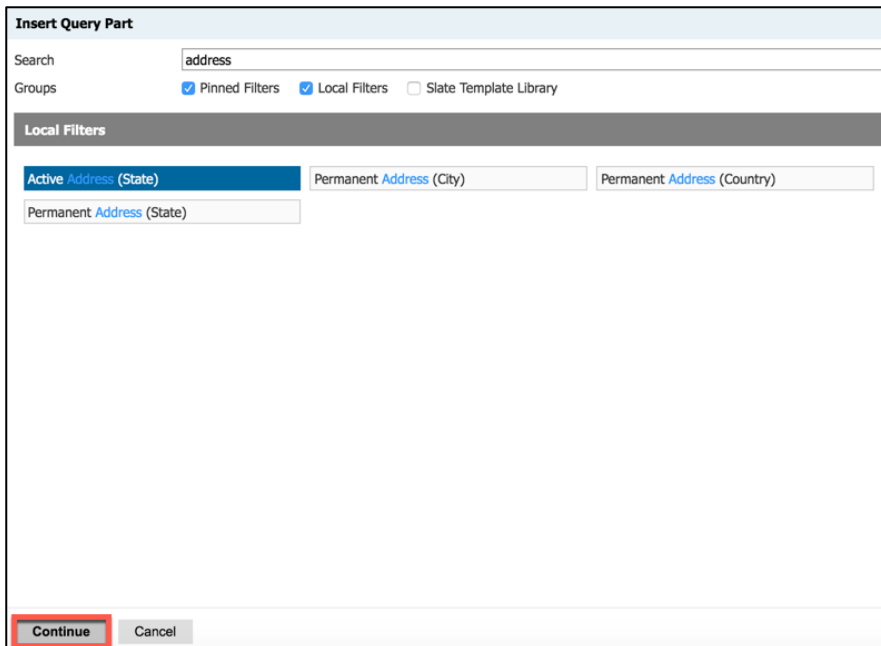


## Filters

To add a filter, click or drag the "Filter" button found on the right. This will open a search window that will allow you to search for all the filters in the system that have been made available for queries.



Filters are typically organized into various groups, but it's easiest to start searching for a specific one. Filters require you to add criteria for each one, so you will need to create one at a time. In the example below, I'm adding a filter on Active Address (State) to only pull applicants from Tennessee. Once you select your filter, click "Continue".



You will get another window to enter your criteria for the filter you selected. In this case, I need to pick Tennessee from the list of available states. To finish, click "Save" to go to the query page or "Save and New" to add another filter.

**Edit Part**

Status: Active

Name: Active Address (State)

Source Type: Local Filter

Memo: Search for active state address

Matching Rows: 2,053

Active Address (State): IN

Search...  
 Show Selected

- Puerto Rico
- Rhode Island
- South Carolina
- South Dakota
- Tennessee
- Texas
- Utah
- Vermont
- Virgin Islands, U.S.
- Virginia

Save Save and New Cancel

You will see you filters appear under the section in the query. To add more filters, follow the same steps. Filters can also be removed by hovering over the filter and clicking on the red X that appears on the right.

Filters Matching Rows: 2,053

Active Address (State) IN Tennessee

Filter  
 Custom SQL  
 OR  
 NOT  
 (  
 )

## Sort Keys

To add a sort key, click or drag the “Sort Key” button found on the right. This will open a search window that will allow you to select your sort keys.

Sort Keys

Sort Key

The exports that you have added to your query will be shown at the top of the screen. You can select one or multiple sort keys and click “Save” to continue.



**Insert Query Part**

Search

Groups  Selected Exports  Pinned Exports  Local Exports  Slate Template Library

**Selected Exports**

Select All First Middle Last

**Pinned Exports** [Edit Pinned](#)

**Local Exports**

**Alumni Volunteer Information**

Select All Alumni First Name Alumni Last Name Alumni Email

Alumni Street 1 Alumni Street 2 Alumni Street 3 Alumni City

Alumni County Alumni Region Alumni Postal Alumni Country

Alumni Geomarket

**Application Dates**

Select All Created Updated Submitted

**Bluesheeting - GPA Calculation Exports (for Grade Calculation)**

Select All Course 1 - 8th Grade - Grade Course 2 - 8th Grade - Grade Course 3 - 8th Grade - Grade

Course 4 - 8th Grade - Grade Course 5 - 8th Grade - Grade Course 1 - 9th Grade - Grade Course 2 - 9th Grade - Grade

Course 3 - 9th Grade - Grade Course 4 - 9th Grade - Grade Course 5 - 9th Grade - Grade Course 6 - 9th Grade - Grade

**Save** **Cancel** [Back](#) [Next](#)

To reorder the sort keys, you can drag the boxes until you get your desired order. In the example above, we want to sort by last name, then by first name. The sort keys would look like this:

Sort Keys

Last ASC

First ASC

By default, the sort keys will be in ascending order (A-Z). If you want to change them to descending order (Z-A), you can double click on the sort key, and make the update.

## Edit Part

Status	<input type="text" value="Active"/>
Name	<input type="text" value="Last"/>
Source Type	Local Export
Source Key	Name / last
Sort Order	<input type="text" value="Descending"/>
Width	<input type="text"/>
Export Value	<input type="text" value="Value"/>
Format Type	<input type="text" value="Default"/>
Null Value	<input type="text"/>

Save

Delete

Cancel