Slate Queries Documentation

Questions? – ems@list.vanderbilt.edu

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

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
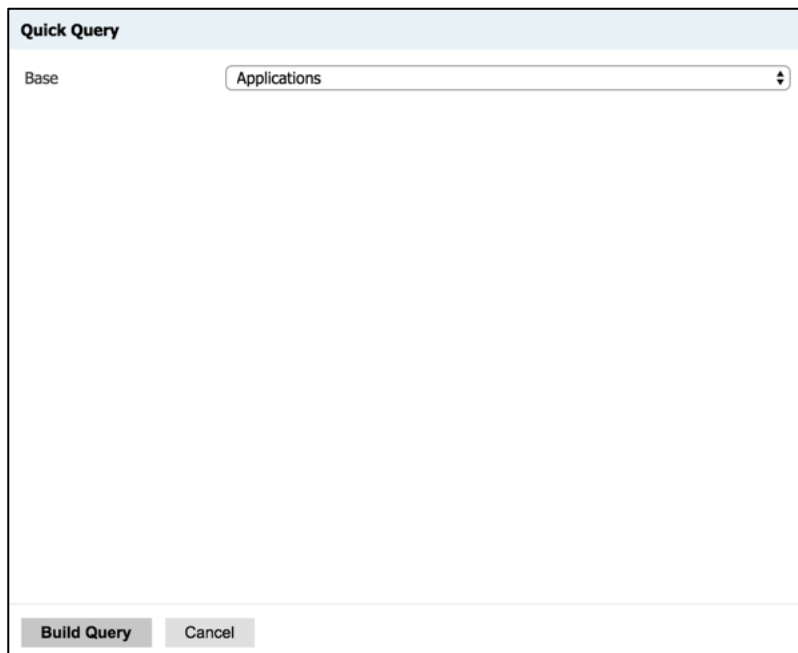
Click on the "New Query" button and complete the required items.

- 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.
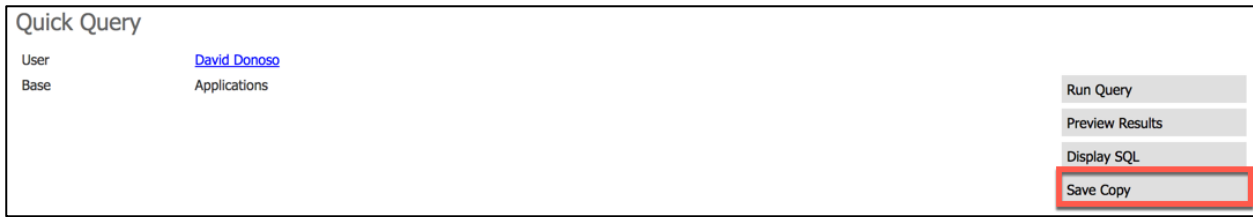
Click "Save" to continue.

Quick Query

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

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.
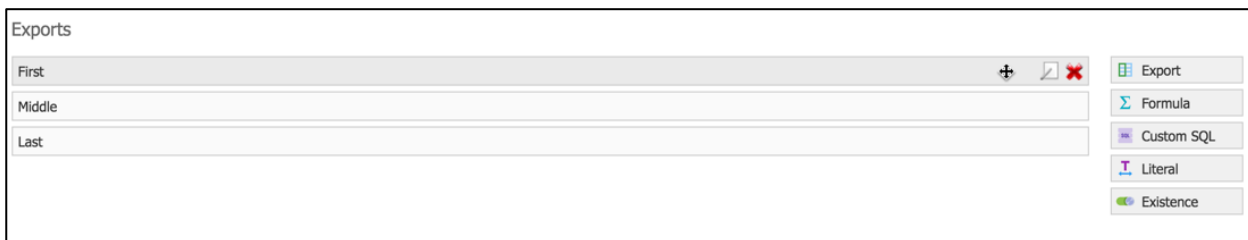
Exports

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.
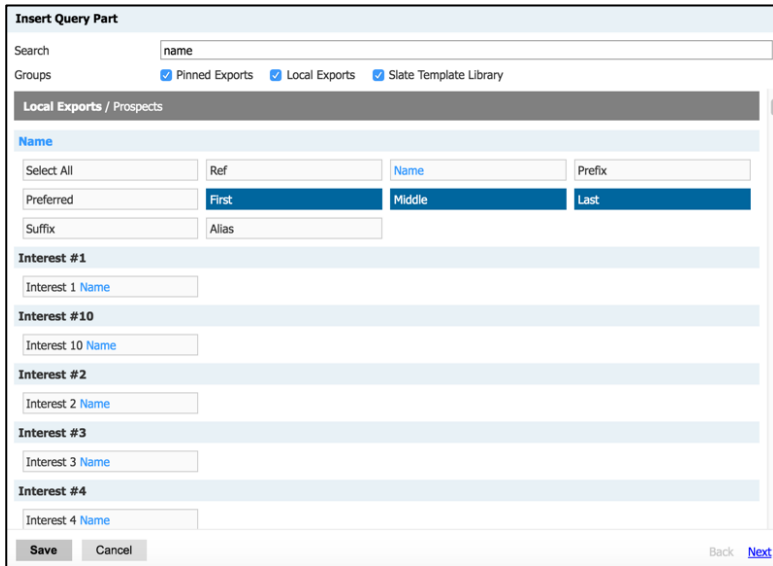

Once you are done selecting you exports, click Save. You will see you exports appear under the section in the query. To add more exports, follow the same steps. To remove exports, hover over the export you want to remove and click on the red X that appears on the right.
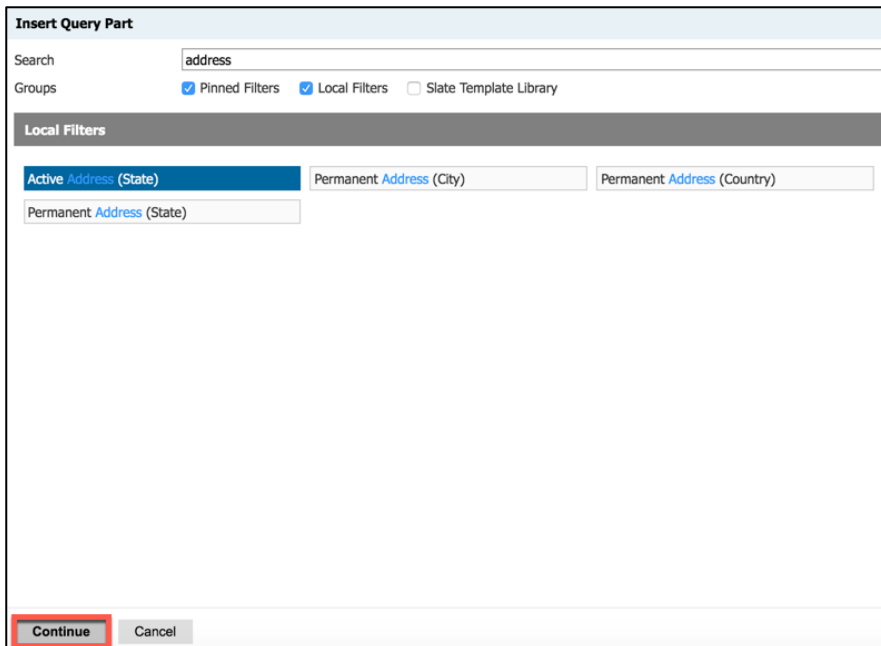

Filters

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   Matching Rows: 38,992

Filter
Custom SQL
OR
NOT
(
)
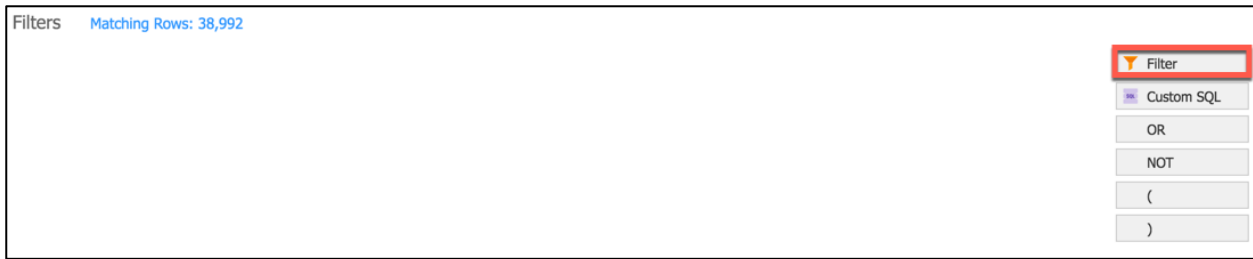
Filters are typically organized into various groups, but it's easiest to start searching for a specific one. Filters require you to add criteria for each one, so you will need to create one at a time. In the example below, I'm adding a filter on Active Address (State) to only pull applicants from Tennessee. Once you select your filter, click "Continue".

Insert Query Part

Search   address

Groups   ☑ Pinned Filters   ☑ Local Filters   ☐ Slate Template Library

Local Filters

| Active Address (State) | Permanent Address (City) | Permanent Address (Country) |
| Permanent Address (State) | | |

Continue   Cancel

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.

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.

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.

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.

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:

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	Active ⬍
Name	Last
Source Type	Local Export
Source Key	Name / last
Sort Order	Descending ⬍
Width	
Export Value	Value ⬍
Format Type	Default ⬍
Null Value	

Save Delete Cancel