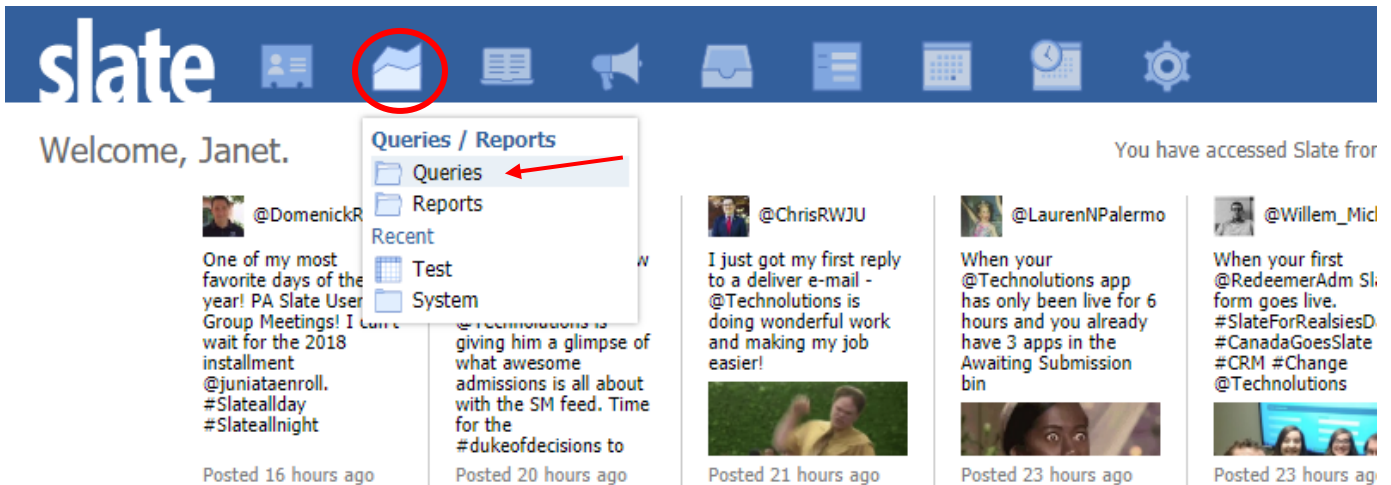


Creating Queries

Queries are a quick and easy way to get specific data on applicants and prospects. The Slate query tool allows you to export the data to Excel and manipulate as you see fit.

- Query Types.....1
- Query Building Instructions.....2
- Exporting Results to Excel.....4
- Viewing Results in Slate.....5
- How to Delete or Rename a Query.....7
- How to Share your Query with Others.....8

To create a query, select “Queries” from the navigation bar’s second icon.



There are two options available when creating queries: **New Query** and **Quick Query (lightning bolt)**.



New Query is for queries you plan to use frequently and want to save permanently.

Quick Query (lightning bolt) is for ad-hoc querying and will not be saved.

Query Building Instructions

Once you click New Query or Quick Query, you'll see the following screen. Select **Configurable Joins** as the Type and then for the Base, select **Application by Population** for Application data, or **Person by Population** for Inquiry/Prospect data.

The image shows a 'Quick Query' dialog box with the following configuration:

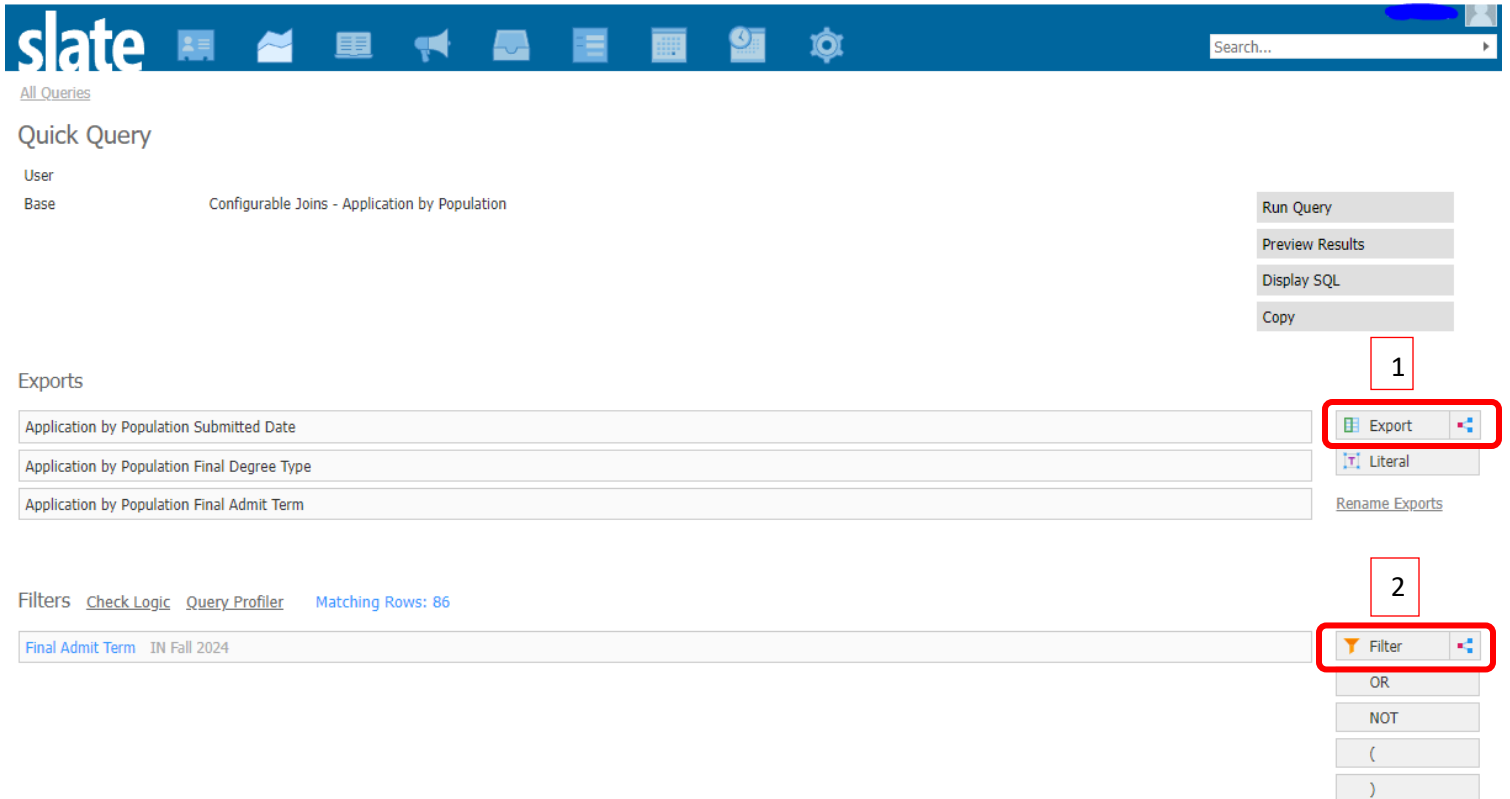
- Type:** Configurable Joins
- Category:** Records
- Base:** Application by Population (selected)

Buttons at the bottom: Build Query, Cancel

Once you select your base, click “Build Query.”

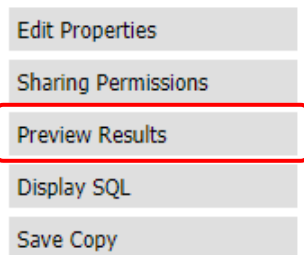
Select exports and filters to create your custom query.

1. **Exports** are the information you want to when you run your query. You can think of these as the column headers you want to see in a spreadsheet.
2. **Filters** will narrow down the population that you want to identify.



If you don't choose any filters, you will see all applications, in all programs you have access to, at any stage in the application processes (submitted, awaiting decision, decided, etc.). If you don't choose any exports, you will see an error message when you try to run the query.

To spot-check your filters and exports as you build your query, you can click "Preview Results" on the upper right menu.



Once you have finished adding your Exports and Filters, click on the name of your query in upper left part of the screen to get back to the overview page, where you can then click the “Run Query” button.

The screenshot shows the Slate interface for editing a query. The breadcrumb trail is 'All Queries > Applications Under Dept Review'. The 'Edit Query' section shows the following configuration:

- Folder: Departmental
- User: [Lauren Liston](#)
- Base: Departmental Reader
- Execution Mode: Retrieve all records each time query is run

On the right, the query details are shown:

- Folder: Departmental
- User: [Lauren Liston](#)
- Base: Departmental Reader
- Execution Mode: Retrieve all records each time query is run
- Filters: Bin IN Program Review - 1 Dept Review, Program R; Tag NOT IN Test Record
- Matching Rows: 8,762

The 'Run Query' button is highlighted with a red box.

Once you run the query, you will be taken to the results page.

Exporting Query Results to Excel

The “Output” drop-down menu will default to “Excel Spreadsheet,” so if you want to view your query in Excel, all you have to do is click the “Export” button.

The screenshot shows the query results page for 'Spring 2019 - Awaiting Materials'. The 'Output' dropdown menu is set to 'Excel Spreadsheet', indicated by a red arrow. The 'Export' button is highlighted with a red circle.

Name	Email	Admit Term	Program	Degree Type	Area of Interest	NCSU StuID	School 1 Degree	School 1 GPA	School 2 Degree	School 2 GPA
Test, Intl Gcert	lwgentil@ncsu.edu	Spring 2019	Business Administration	MBA Part Time - NC State...	Financial Management	200237586	Bachelor of Arts			

Once “Export” is clicked, the Excel file will automatically download. As you can see in the below image, the query’s row headers (the export values you selected when building the query) will populate in the Excel file:

The screenshot shows an Excel spreadsheet with the following row headers highlighted in red:

Name	Email	Admit Term	Program	Degree Type	Area of Interest	NCSU StuID	School 1 Degree	School 1 GPA	School 2 Degree	School 2 GPA
Test, Intl Gcert	lwgentil@ncsu.edu	Spring 2019	Business Administration	MBA Part Time - NC State...	Financial Management	200237586	Bachelor of Arts			

Viewing Query Results within Slate

If you would like to see a quick overview of a particular applicant, you can click on their name or row:

The screenshot shows the Slate interface with a query titled "Spring 2019 - Awaiting Materials". The output is set to "Excel Spreadsheet" and an "Export" button is visible. Below the table, the first row is highlighted with a red border:

Name	Email	Admit Term	Program	Degree Type	Area of Interest	NCSU StuID	School 1 Degree	School 2 Degree
Test, Intl Gcert	lwgentil@ncsu.edu	Spring 2019	Business Administration	MBA Part Time - NC State...	Financial Management	200237586	Bachelor of Arts	

The following preview box will open, showing all fields the query includes:

The "Row Preview" dialog box displays the following fields for the selected record:

- Record: [Lookup Record](#)
- Name: Test, Intl Gcert
- Email: lwgentil@ncsu.edu
- Admit Term: Spring 2019
- Program: Business Administration
- Degree Type: MBA Part Time - NC State Campus
- Area of Interest: Financial Management
- NCSU StuID: 200237586
- School 1 Degree: Bachelor of Arts
- School 1 GPA
- School 2 Degree
- School 2 GPA
- School 3 Degree
- School 3 GPA
- GRE Verbal
- GRE Verbal %
- GRE Quantitative
- GRE Quantitative %
- GRE Analytical Writing
- GRE Analytical Writing %
- GMAT Total
- GMAT Total %
- MAT Total

A red arrow points from the right side of the page towards the "Row Preview" dialog box.

If you select “Lookup Record,” the application will open.

The screenshot displays the Slate application interface. At the top, there is a blue navigation bar with the 'slate' logo and various icons. Below the navigation bar, the main content area shows a query result for 'Test, Intl Gcert'. The interface includes a breadcrumb trail: 'Dashboard > Timeline > 2191 - MBA Awaiting Materials > 2191'. A red arrow points from a callout box to the 'Spring 2019 - Awaiting Materials' link in the breadcrumb. Another red arrow points from a callout box to the 'Next' link in the top right corner. The main content area displays the following information:

- Test, Intl Gcert** (Applicant: 930088738)
- 2191 - MBA** (Submitted February 14, 2018; Last updated February 15, 2018)
- Program/Degree:** MBA Part Time - NC State Campus (NCSU ID: 200237586)
- Concentration:** Financial Management (SIS App #:)
- Term:** Spring 2019 (Unity ID: Intl Gcert)

Below this information is a 'Checklist' section with the following items:

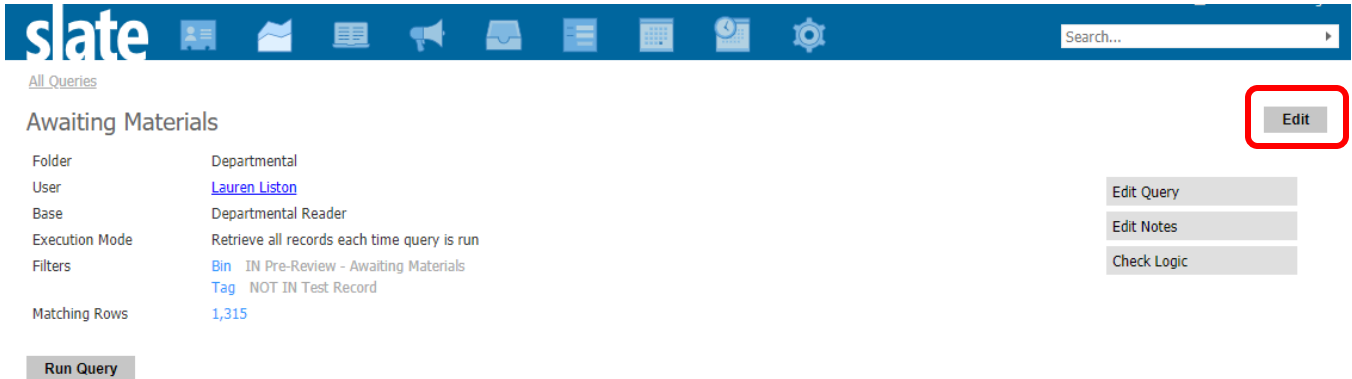
Item	Status
Official Transcript (Stanford University)	Enrollment Awaiting
Certificate of Financial Responsibility	Internatio... Awaiting
Official GRE or GMAT scores	Awaiting
Unofficial Transcript (Stanford University)	Awaiting
Recommendation (Tesor Test, ncsu)	Awaiting
Recommendation (Test Test, ncsu)	Awaiting
Recommendation (Testy Test, ncsu)	Awaiting

At the bottom, there is a 'Materials' section with a table that is partially visible.

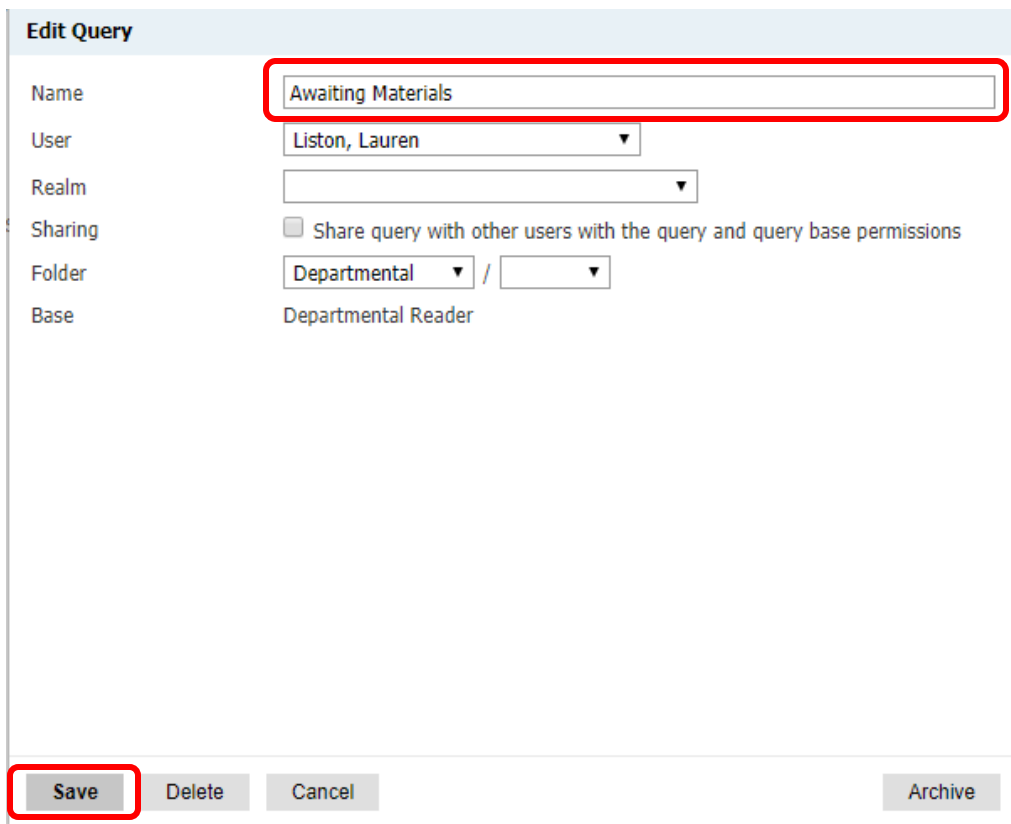
Changing a Query Name or Deleting a Query

Click on the name of the query you want to edit from the main query list to pull up the overview.

Then click "Edit" in the top right corner:



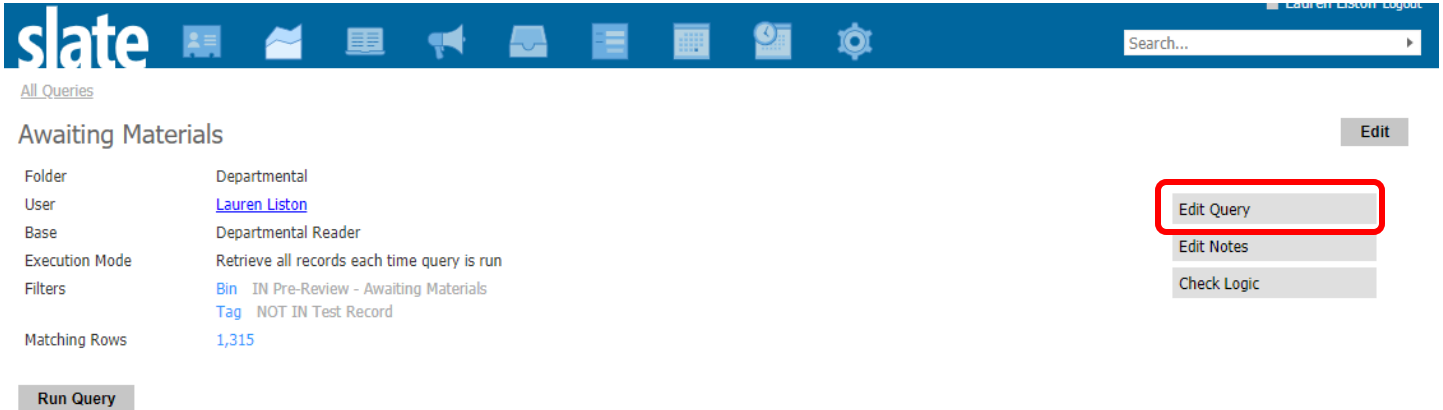
A window will appear, with the name of your query in a text field. That field can be edited, and you may change the query name by typing in that field and then clicking "Save":



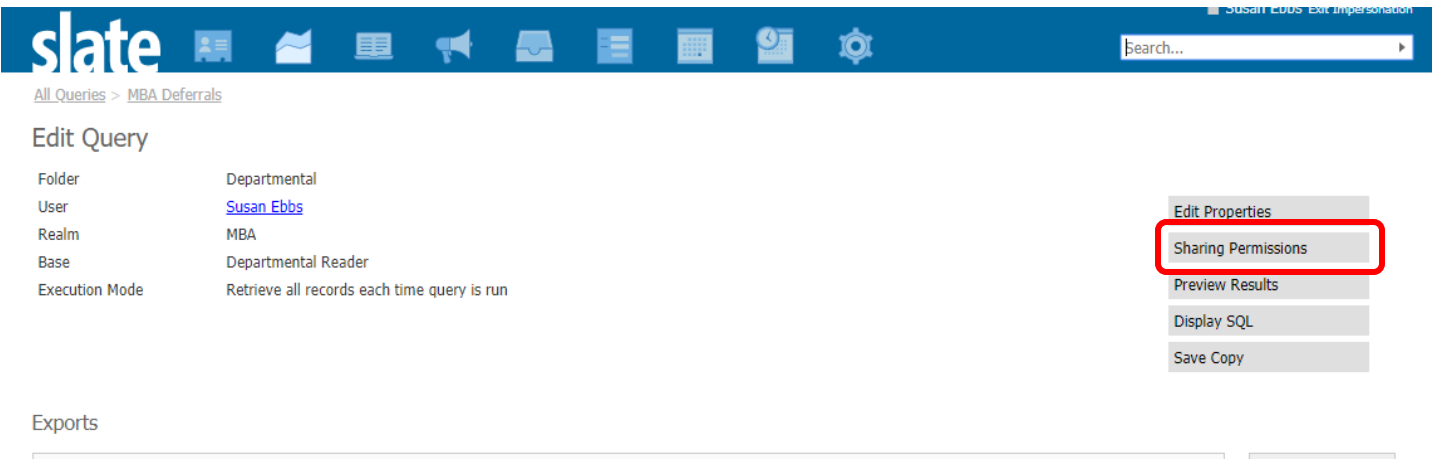
In that same window, click "Delete" to delete the query.

Sharing your Query with Other Users

To share the query with someone else, you can select the query from the list, and click "Edit Query" from the right side of the page:



On the next page, you'll click "Sharing Permissions" from the right-side buttons:



Click "Add Grantee"



Select "User" from the "Type" drop-down menu:

Edit Grantee

Active

Type

Permissions

- User
- Dataset
- Dataset Row
- Permission
- Role

And then type in the person's name in the text box that appears below. It should begin to auto-populate as you type.

Edit Grantee

Active

Type

User

Permissions

- Lauren Ball
- Lauren Gardner
- Lauren Liston
lpalerm@ncsu.edu
- Lauren Schnabel

If you want the person to be able to edit the query you can check both boxes, but if you only want them to be able to see and run the query you have created, only check the "Display/Run Query" option. Then click "Save". Repeat the same steps to share with more users.

Edit Grantee

Active	<input type="text" value="Active"/>
Type	<input type="text" value="User"/>
User	<input type="text" value="Lauren Liston"/>
Permissions	<input type="checkbox"/> Display/Run Query <input type="checkbox"/> Edit Query

If you need assistance creating queries or cannot find a filter or export you are looking for, please contact Lauren Liston (lpalerm@ncsu.edu) in the Graduate School. Please also consult our Export Value spreadsheet under the Queries section of our training website (go.ncsu.edu/Slate).