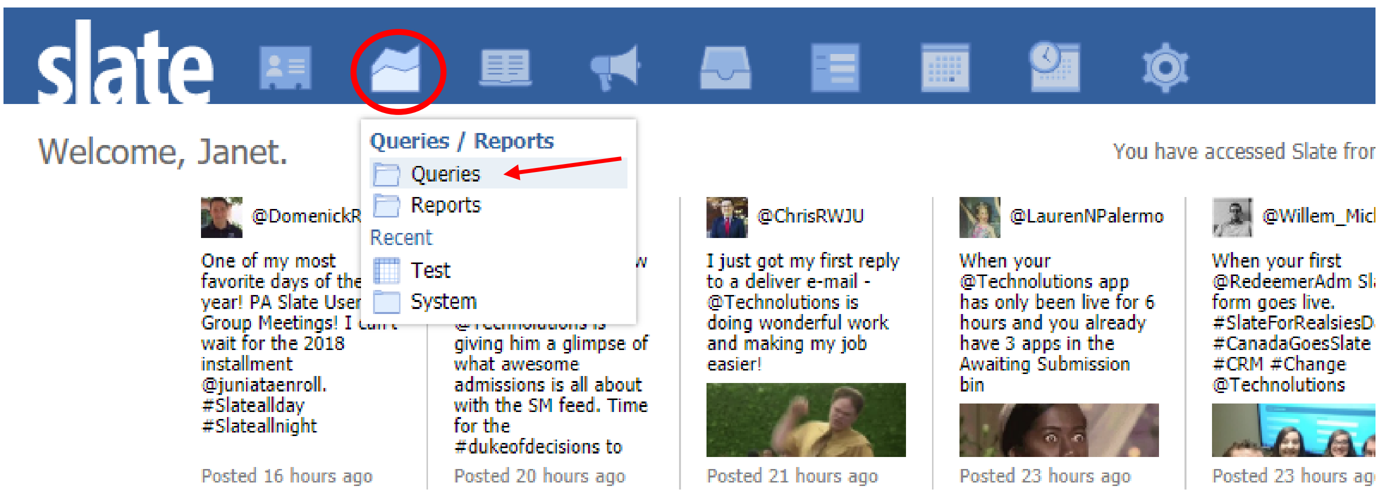
**Creating Queries**

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.



To create a query, select "Queries" from the navigation bar's second icon.



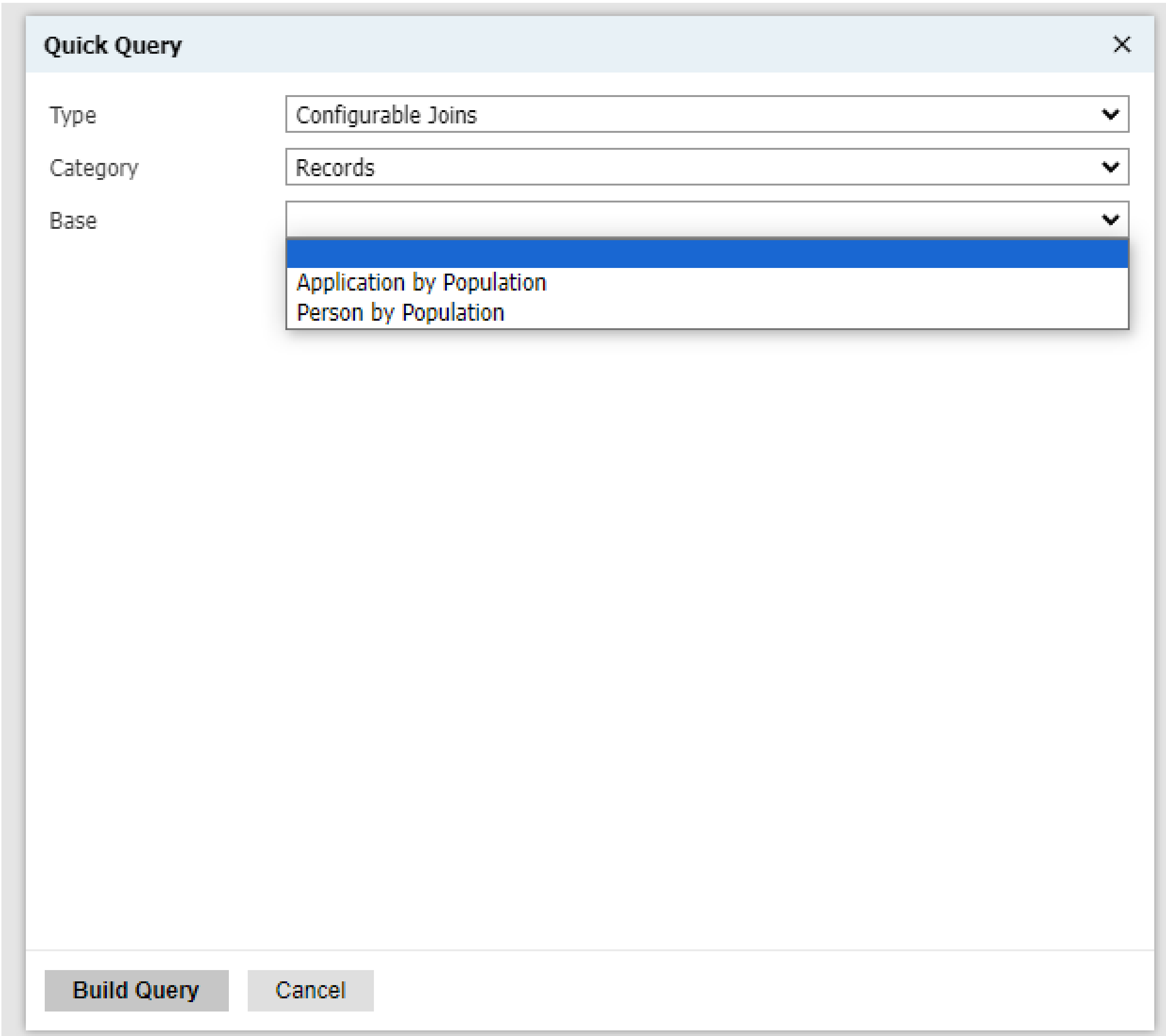

There are two options available when creating queries: **New Query** and **Quick Query (lightning bolt)**.


**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 Intrsuctions**

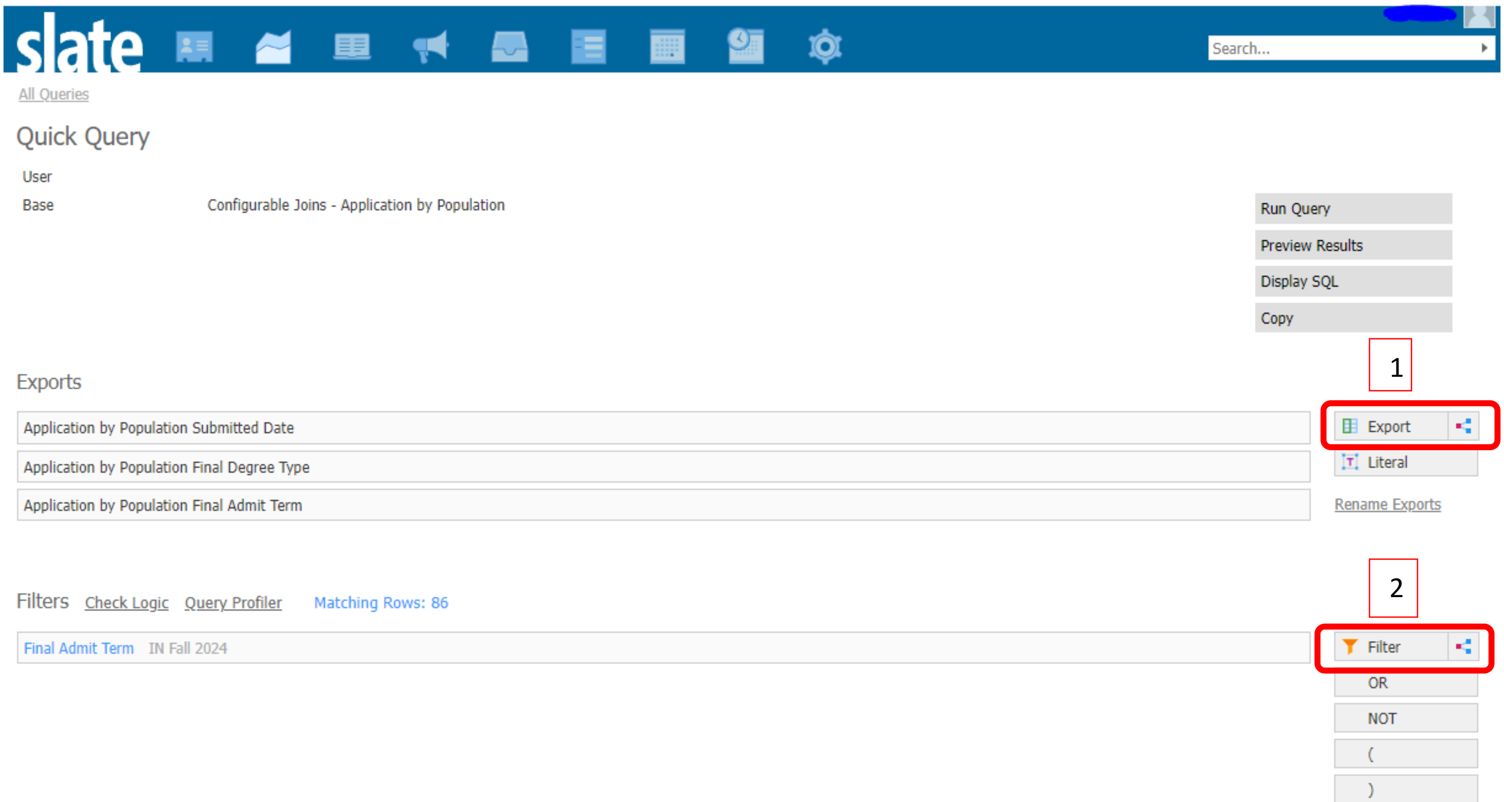
Once you click New Query or Quick Query, you'll see the following screen. Select **Configurable Joins** as the Type and then for the Base, select **Application by Population** for Application data, or **Person by Population** for Inquiry/Prospect data.




Once you select your base, click "Build Query."

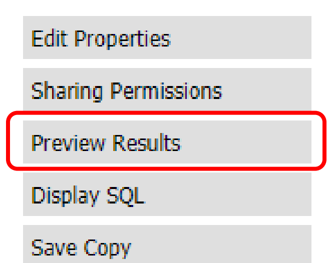
Select exports and filters to create your custom query.

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.

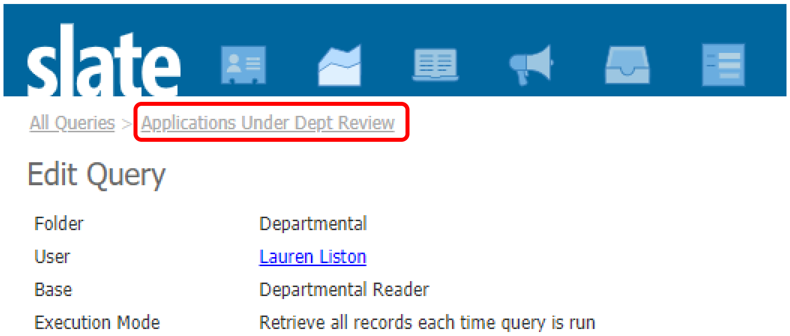


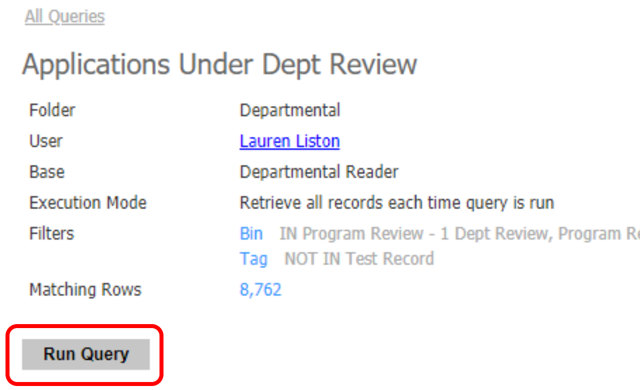

***If you don't choose any filters**, you will see all applications, in all programs you have access to, at any stage in the application processes (usbumitted, awating decision, decied, etc.). **If you don't choose any exports**, you will see an error message when you try to run the query.*

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.

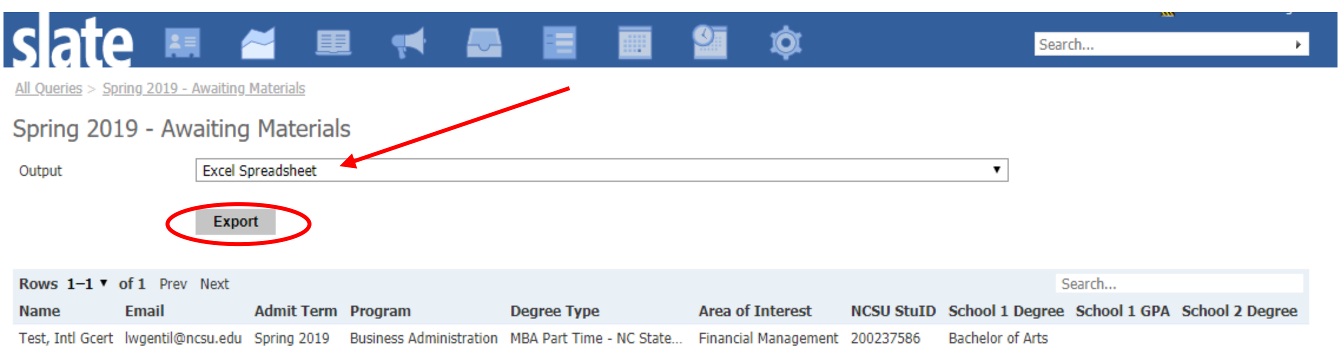


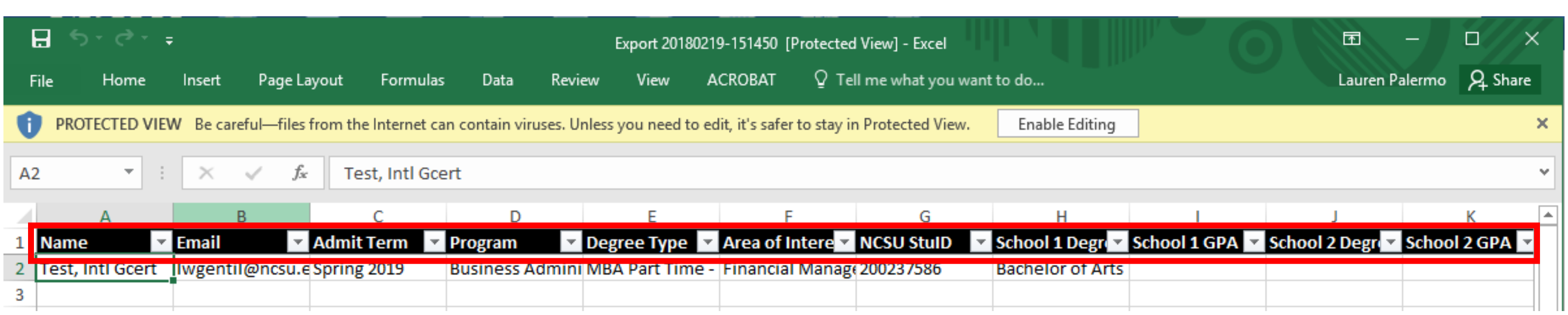

Once you run the query, you will be taken to the results page.

**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.

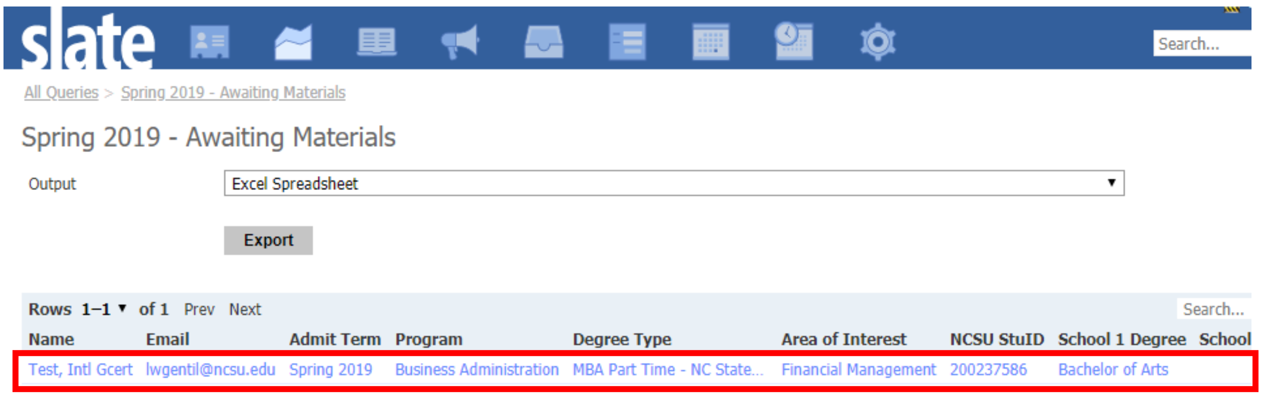



Once "Export" is clicked, the Excel file will automatically download. As you can see in the below image, the query's row headers (the export values you selected when building the query) will populate in the Excel file:

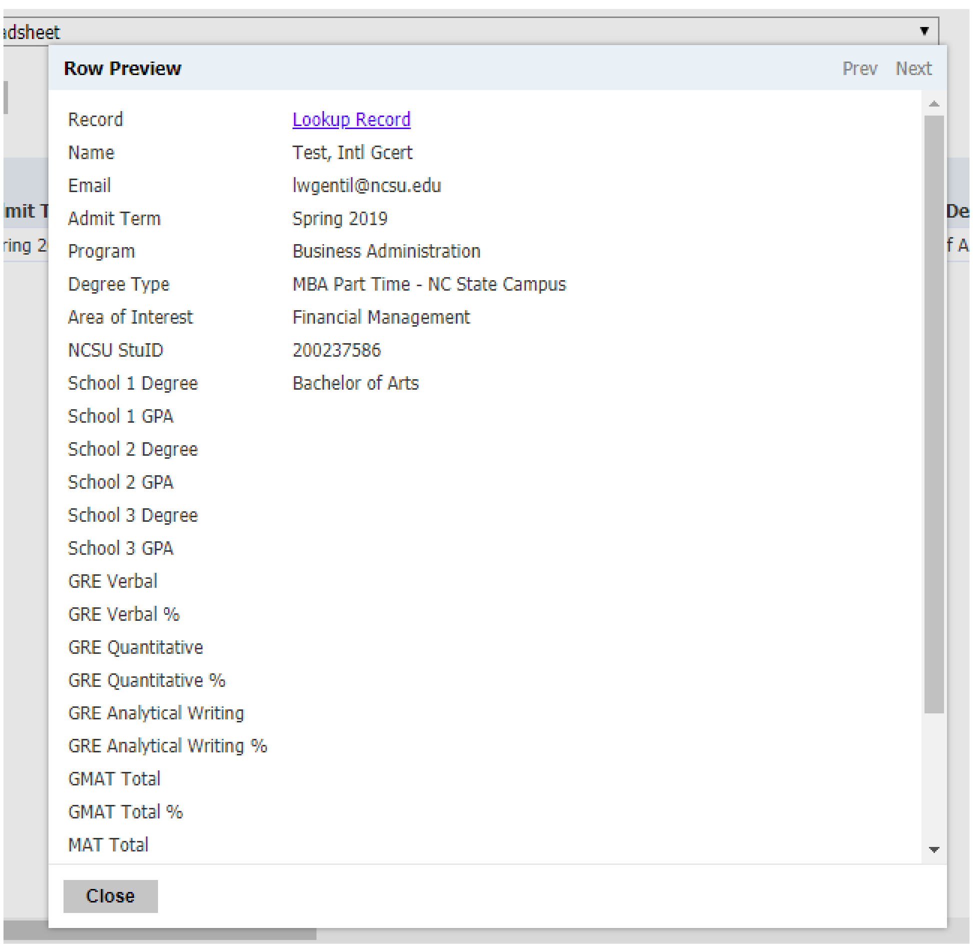


**Viewing Query Results within Slate**

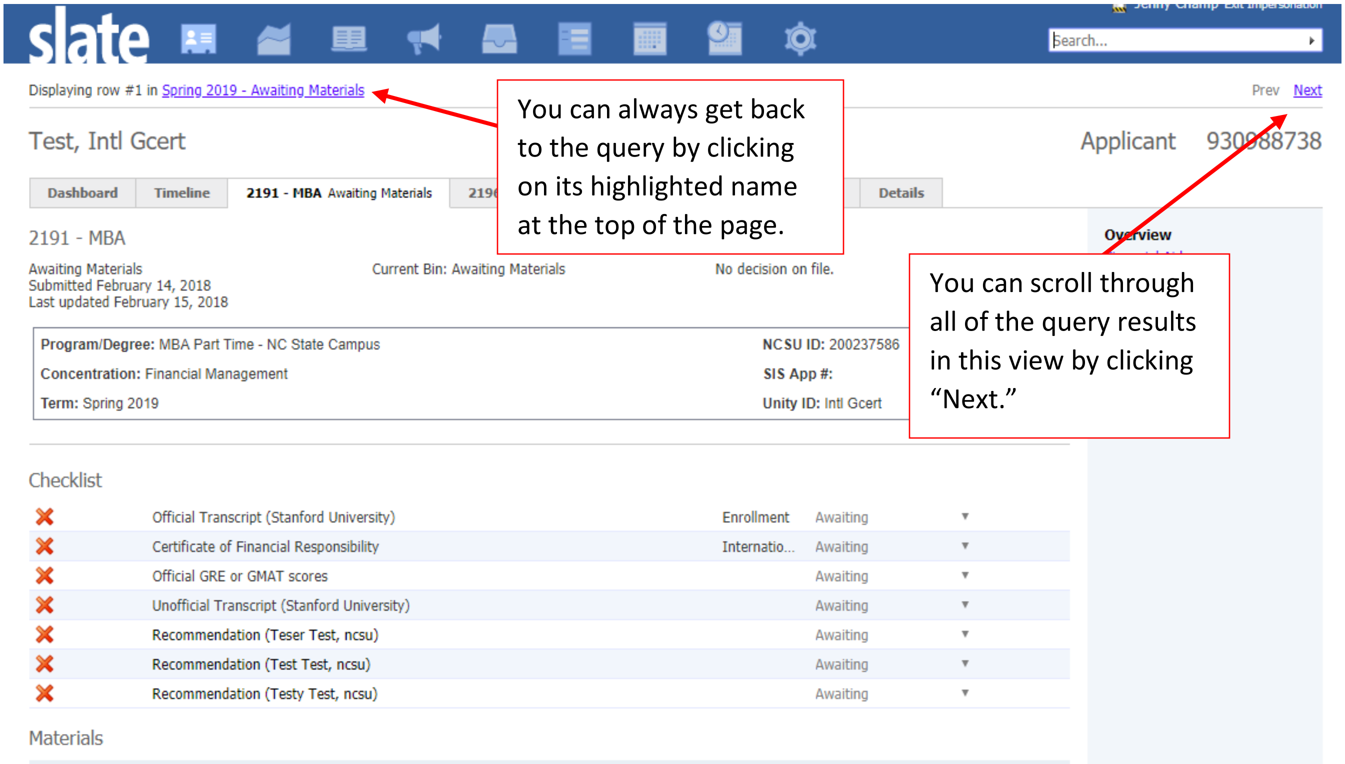
If you would like to see a quick overview of a particular applicant, you can click on their name or row:




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



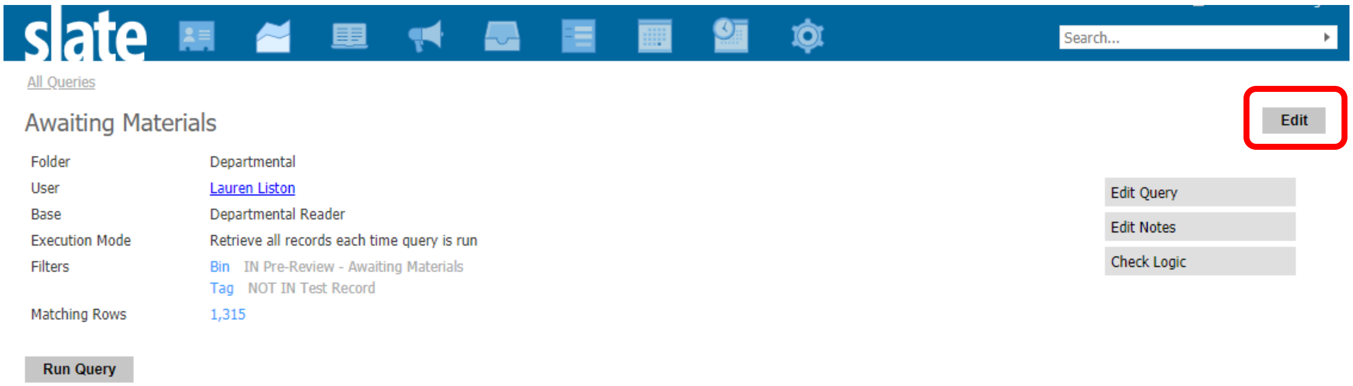
If you select "Lookup Record," the application will open.



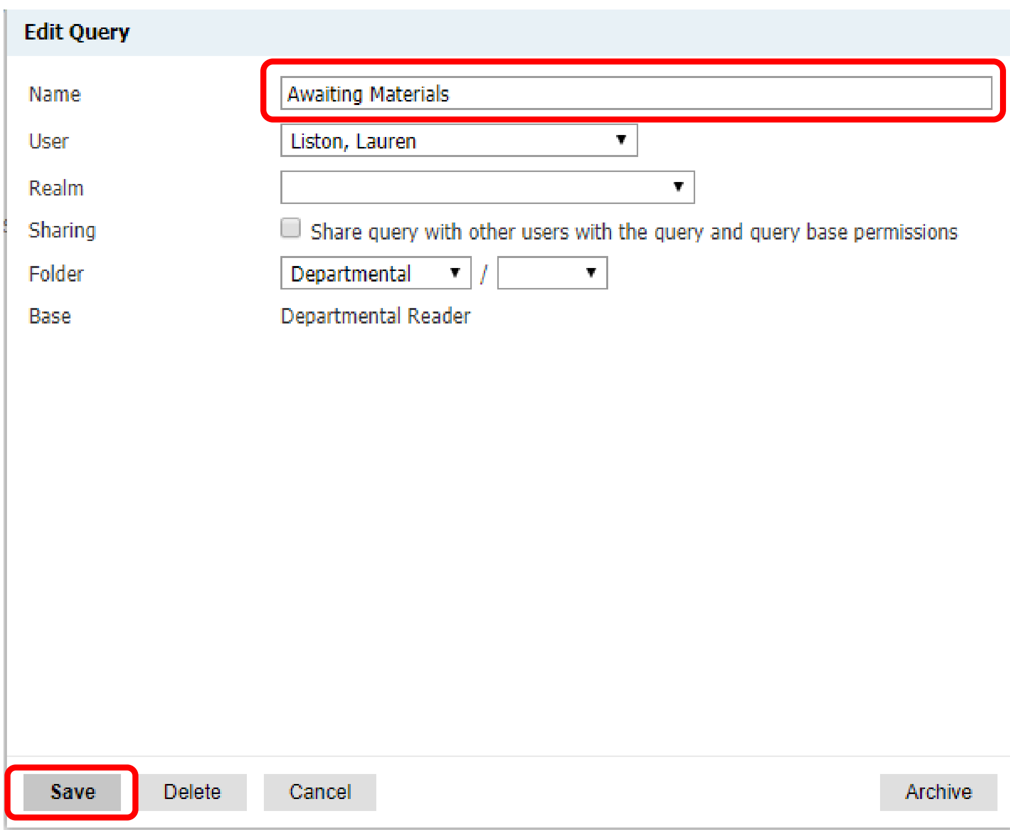
**Changing a Query Name or Deleting a Query**

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:



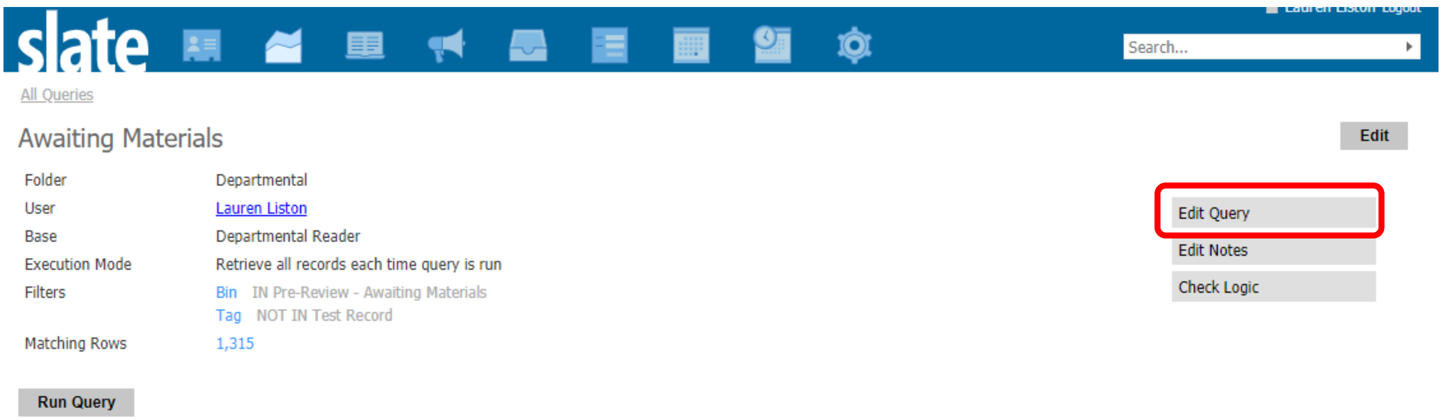

A window will appear, with the name of your query in a text field. That field can be edited, and you may change the query name by typing in that field and then clicking "Save":



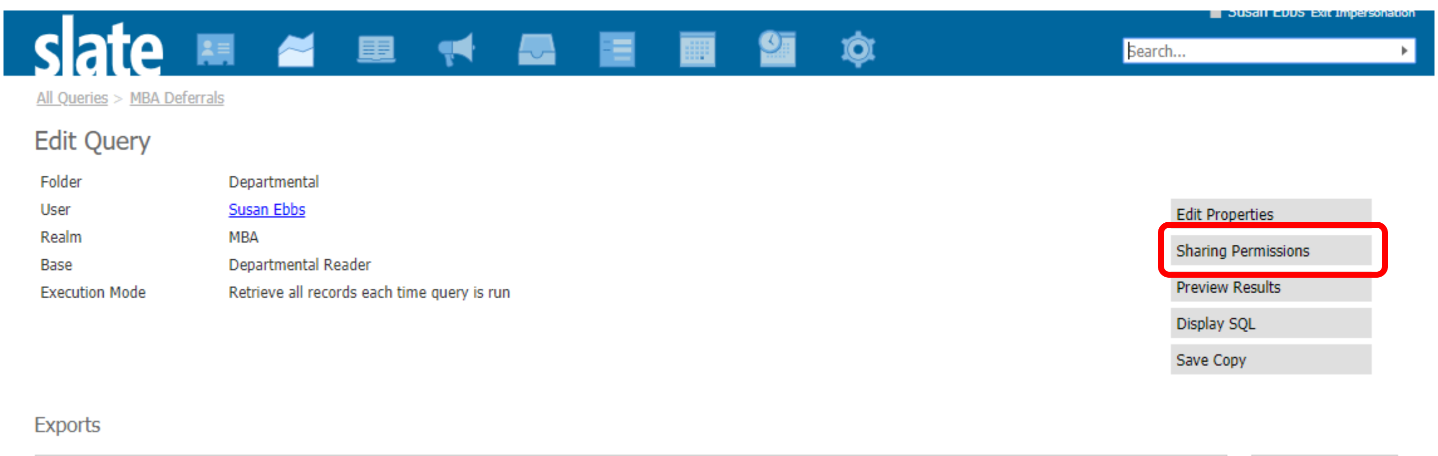

**In that same window, click "Delete" to delete the query.**

**Sharing your Query with Other Users**

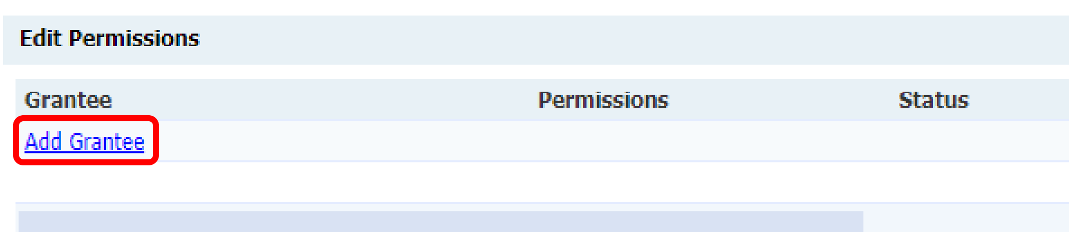
To share the query with someone else, you can select the query from the list, and click "Edit Query" from the right side of the page:



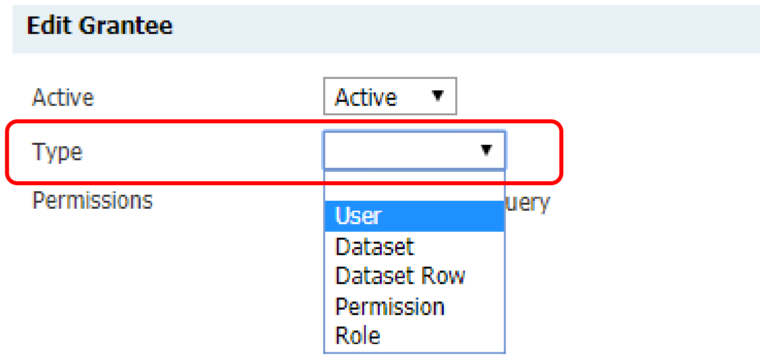

On the next page, you'll click "Sharing Permissions" from the right-side buttons:



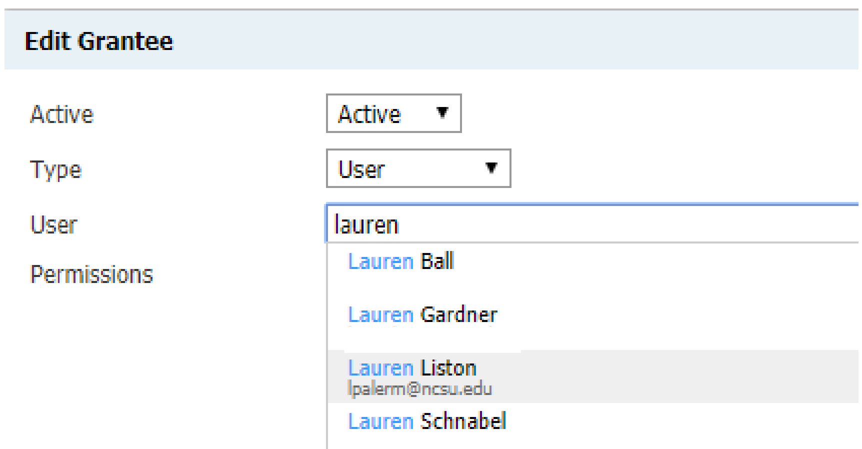

Click "Add Grantee"



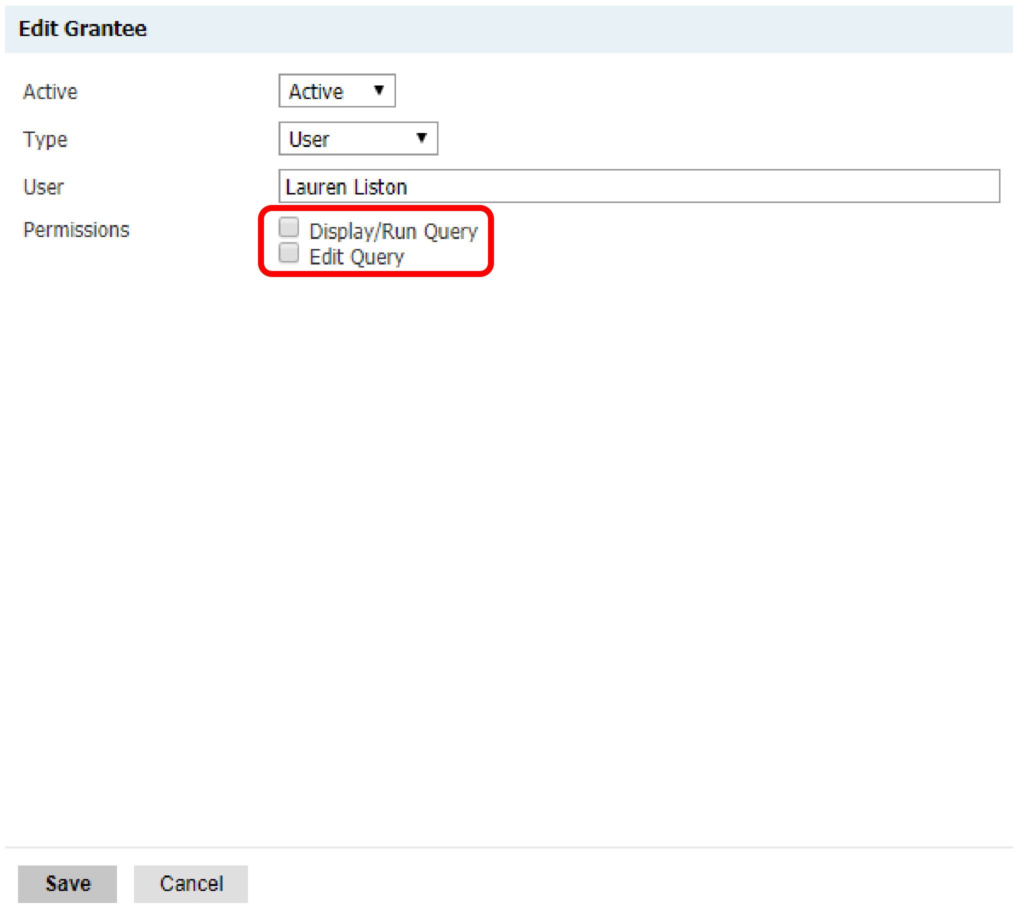
Select "User" from the "Type" drop-down menu:




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



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.




**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).**