SONISWEB®

Scholastic ONline Information System
for the Web

Query Builder

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Although it can be broadly used for "finding stuff" and printing the results, Query Builder is most useful for finding a group of people to whom you want to send a e-mail note, export a list, or set an activity.

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NEW IN THIS EDITION

- ■ This is a new manual for this new function of SONISWEB® version 2.0.

NAVIGATING THE FUNCTIONS

• Figure 1 Toolbar[1] for those with User-ID access

Administrative users have User-IDs and Passwords and see an initial display like Figure 1. Administrative users can be anyone in your system with an ID but typically they're paid Staff and those few Faculty with additional administrative duties.

The access rights of an administrative user is defined by:

• Figure 2 Function Lists[1] - Partial

1. The **Profile** selected when you were issued a User-ID and Password. Typical Profile categories are the Registrar, the Registrar's staff, the Financial Officer, Admissions staff, Deans, etc. <u>One</u> profile covers all the people in each staff category.

2. The <u>individual</u> **limits** specified for you when you were issued a User-ID and Password. A typical limit is preventing access to faculty and staff personal records.

3. The **privileges** added for you when you were issued a User-ID and Password. The right to "Make Grades Official" or "View and Change PINs" are examples.

After clicking **Systems** in Figure 1 you get the selections shown in Figure 2.

Diagnosing and Fixing Problems

See the text "Messages, Errors, and Diagnosis".

Setting Your Browser for Proper Function and Security

Internet Explorer[2] (IE), Firefox™, Netscape®, and Opera Web browsers have an "auto-complete" or password-form save feature that is handy for individual computers but defeats privacy on shared computers like those in computer labs and libraries. See the text "Browser Settings" to set your browser for security, good performance, and to prevent your getting old data.

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[1] You only see what you're authorized to see by your Profile and individual Limits and Privileges. So your choices may be fewer than these.

[2] Only Internet Explorer (IE) version 5.5 or later is supported for administrative use.

BUILDING THE QUERY

Click **Systems** in Figure 1 then Query Builder in Figure 2. You see the very large display[3] shown in Figure 3.

The query entries are laid out by SONISWEB® record such as "Address" or "Interests".

Figure 6 on page 5 is a sample query.

Note there are Clear, Submit, and Reset buttons at the top and the bottom so, no matter where you are on this large display, you can find a button to submit the query.

You enter the query values in this way:

- A blank entry for a field means don't test this item in the database; everything is acceptable.

- For most entries, you can pick one or more[4] items. For example, you can choose Juniors and Seniors (Status) from Maryland and Virginia (State).

- Some fields require typed input, most commonly for dates. See "Date Input" on page 6.

• Figure 3 Query Builder Display[3]

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[3] What you see in Figure 3 depends on your security limits as described on page 9.

[4] See Figure 20 on page 11 for guidance on selecting multiple items from a list.

- The "Check All" checkbox at the bottom of Figure 3 (enlarged in Figure 4) is used in the actions shown in Figure 12. If checked then all the checkboxes in Figure 12 are checked. If it's blank, none of the checkboxes are checked.

• Figure 4 Check All

- Figure 5 shows the buttons at the top of Figure 3. Those at the bottom function the same way:
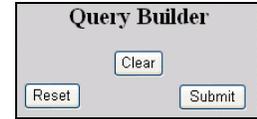
• Figure 5 Buttons at the Top and Bottom of Figure 3

  Clear: when you use <u>Return</u> in Figure 10 or Figure 12 all your chioces in Figure 3 remain as you set them. The Clear button erases them so you can make new settings.

  Reset: if clicked <u>before</u> you click the Submit button, it erases what you've just entered in Figure 3. If a <u>Return</u> link brought you to Figure 3, you must use the Clear button to clear the settings.

  Submit starts the query. You get a result summary like that shown in Figure 10.

Query Example

• Figure 6 Query Example[3]

Here's a simple query. As shown by the outlined settings in Figure 6, this is to find all Virginians born after January 1, 1945 who are alumni/ae. With the results from this query you can set an activity to send a mailing (Figure 14) or an e-mail message (Figure 15).

City Input

To query by city[3], enter the full city name or a portion of the name. Figure 7 illustrates it.

You can also enter several city names separated by commas as shown in Figure 8.

• Figure 7 Partial City Name

• Figure 8 Several City Names

Date Input

You select the comparison from a list as shown in Figure 9.

As you start to type in the date, a calendar appears as illustrated in Figure 9. You can select the date from the calendar or you can simply type the date.

USING THE QUERY RESULTS

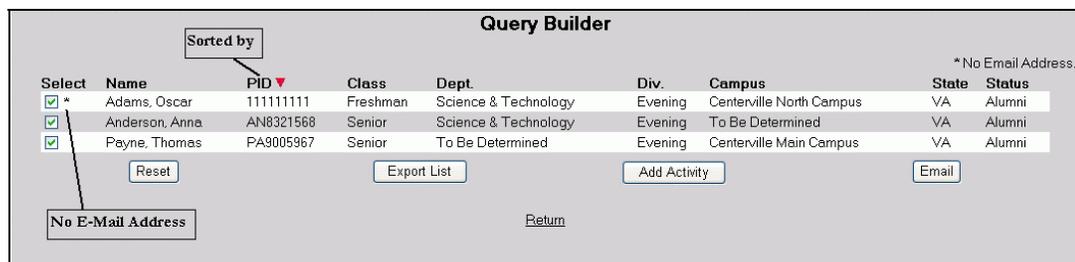The summary of the query, shown in Figure 10, gives you three options:

• Figure 9 Date Input

- Click Return where the results indicate that you need to change the selections in Figure 3.

- Preview Report shows you the list of people found with the query. Figure 11 shows it.

- … Distinct Users shows

• Figure 10 Query Builder Result Summary

• Figure 11 Report

you how many were found based on your selections in Figure 3. Click it to get Figure 12.

• Figure 12 Query Builder Actions from the Results
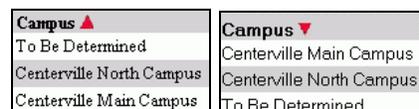
• Figure 13 Sort by Columns

To sort by one of the columns in Figure 12 click the column[5] heading you want to sort by. Figure 13 shows what happens when you click another column in Figure 12. Click it again and it switches sort direction from descending to ascending, etc.

The action you take in Figure 12 depends on these factors:

■   The checkmarks under Select in Figure 12 mean these persons are to be included in the action you start with the buttons at the bottom.

These all have checkmarks because you checked the "Check All" checkbox in Figure 3 (Figure 4). Had you turned off the checkmark in "Check All", all the checkboxes in Figure 12 would be blank.

■   The asterisks (*) beside checkboxes means there's no e-mail address for this person. So if you use the Email button in Figure 12, those persons will never be sent the e-mail note in spite of the checkmark.

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[5] Where you want to sort by several columns, Expor tit as a spreadsheet (Figure 12) and use the sorting provided by the spreadsheet software.
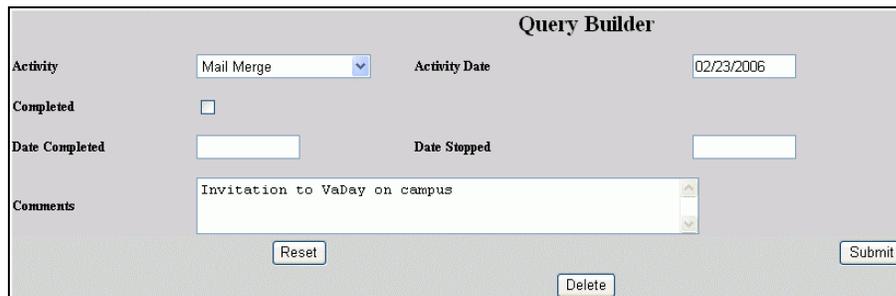
Action Buttons in Figure 12

Reset erases any checkmark changes you've made so you can start over.

Export List puts the list in a file for you to use as you wish. When you click the button, your browser asks you where you want it saved on your computer. Once on your computer you can open it in any spreadsheet program that supports the "xls" (Excel) file format.

Add Activity opens a dialog with the Activities function of SONISWEB® so you can create and add an activity for your records.
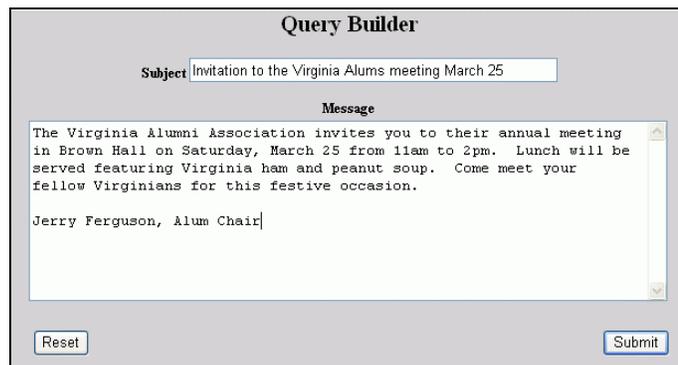

• Figure 14 Add Activity

As Figure 14 shows it's much like adding an "Activity by Group", a standard SONISWEB® function. All those in the list (Figure 12) have the activity added for them.

Email gives you a prompt display for entering the e-mail note as shown in Figure 15. When you click the Submit button, the note is sent <u>except</u> to those with an asterisk by their names in Figure 12 indicating they don't have valid e-mail addresses.

• Figure 15 E-Mail from Query Builder Results

<u>Return</u> in Figure 12 takes you back to the Query Builder display, Figure 3.

LIMITS ON QUERIES

Only users with administrator login rights can use Query Builder. When <u>User Security</u> is set for an administrator, Query Builder limits are set as illustrated in Figure 16.

- Figure 16 Query Limitation Settings in <u>User Security</u>

These are limits for the individual beyond what the Profile allows and prohibits. For example, if "Special Needs" is not chosen in Figure 16, the Special Needs section of Figure 3 will not appear even if the profile assigned to the individual permits access to Special Needs records.

See the SONISWEB® manual "User Authorization & Profiles" for guidance in setting the limits shown in Figure 16.

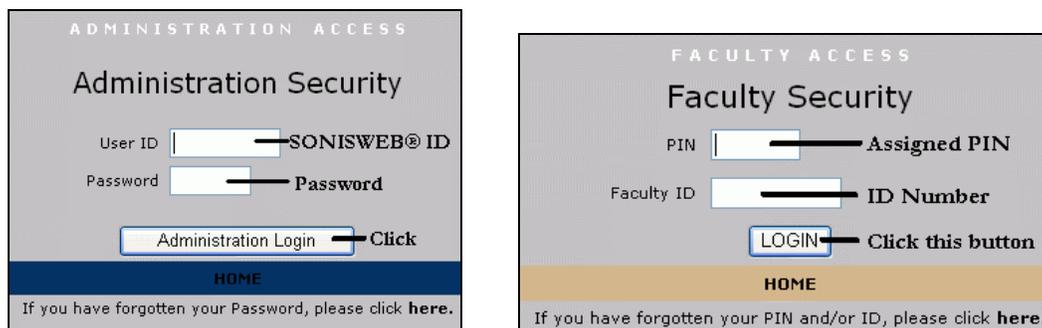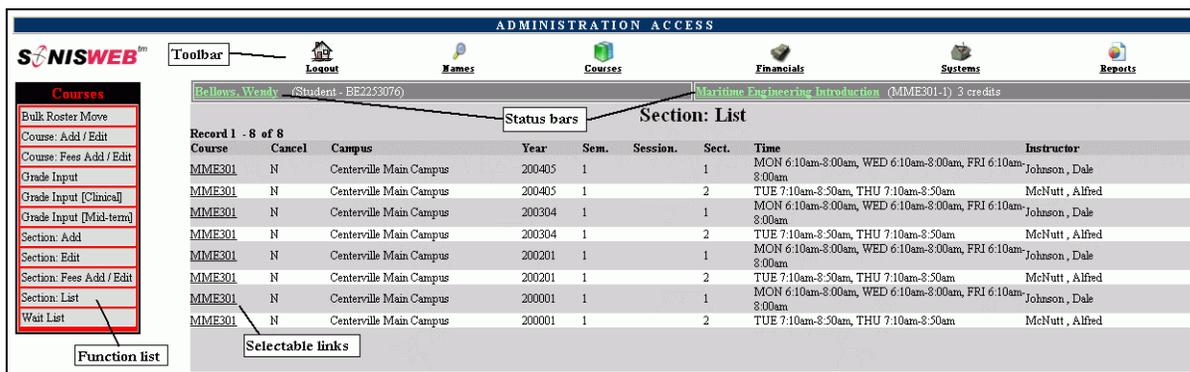# GETTING STARTED - LOG IN AND THE USE OF TABS, BUTTON AND FIELDS

Figure 17 Login Displays

To log in as an administrator, select that option from your Web page. The standard SONISWEB® login pages look like Figure 17.

• Figure 18 Typical SONISWEB® Page

Figure 18 is a typical SONISWEB® page. The actions authorized in your profile appear at the top, called the **Toolbar**.

When you make a selection from the **Toolbar**, the applicable **Function List** appears on the left. Only the functions authorized in your assigned profile and your individual limits and privileges appear. Some might have only **Courses** in the toolbar and only Course: Add/Edit for functions.

Not apparent on the display is whether or not the profile permits editing or changing the information. Once the you select a function from the list on the left, you will see a Submit or similar button at the bottom of the display if you have the permissions to add, edit, or delete the data.

By clicking a **Status Bar** you quickly return to the "person" or the "course" you were processing even if you left it temporarily to look at a financial display or a report. Of course, if you have not selected a person with **Names** or a course with **Courses**, there will be no **Status Bars** at the top.

In Figure 18 click an underlined **Selectable Link** and you go to that record.
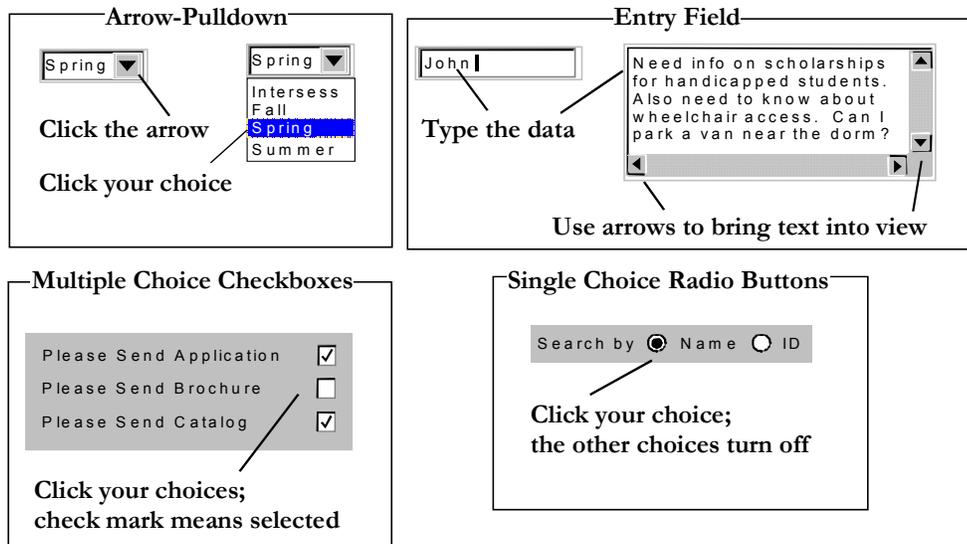
Figure 19 Arrows, Fields, Checkboxes and Buttons

SONISWEB® prompts you for information with windows like those in Figure 19. Use your mouse to click your selection.

■ Once you have made your selection(s), you must click an action button; usually it is Submit, Delete, Reset, etc.

■ For Entry Fields, click the beginning of the field so you don't get any blanks inserted in front of your entry.

■ With Multiple Choice Checkboxes, each time you click a box it goes from selected (check mark) to unselected (no check mark). Click it again and it is selected, etc.

■ Radio Buttons allow only one to be selected; when you click one, all the others are turned off.

Some SONISWEB® lists permit you to make multiple choices. It works just like most PC spread sheet software.

■ To pick two or more in a series, click the top selection, hold down the **Shift** key on the keyboard and click the bottom item in the series. Release the shift key and they are selected as shown on the left and middle of Figure 20.
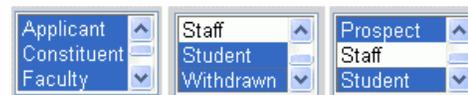
● Figure 20 Selecting Multiple Choices

■ To pick two or more that are <u>not</u> adjacent, click the first item, hold the **Ctrl** key on the keyboard, select the next item and the next, etc. When you have picked the last item you want, release the **Ctrl** key and you see the selections like those on the right of Figure 20.