

(Subquery) Join Us:

Quick Wins with Configurable Joins



Presenter

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Presenter

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+ today's agenda

1. What is the query library?
2. Tips and tricks
3. Use cases
4. Questions & Answers

1

What is the query library?

Query Library Basics

- Make your own exports, filters, and joins to use instance-wide
 - Can be used in queries, portals, recipient lists, etc.
- Can be shared with other users, permissions, and roles
- Only applies to configurable joins queries

Why use the query library?

Why use the query library?

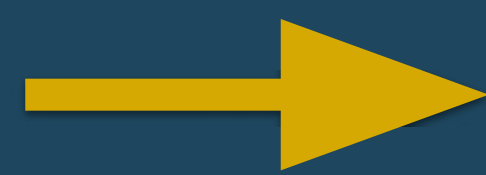
- Efficiency
 - Don't spend time recreating the same exports and filters in multiple places

Why use the query library?

- Efficiency
 - Don't spend time recreating the same exports and filters in multiple places
- Accuracy
 - Trust the joins, fields, and filters used
 - Don't leave room for human error

Why use the query library?

- Efficiency
 - Don't spend time recreating the same exports and filters in multiple places
- Accuracy
 - Trust the joins, fields, and filters used
 - Don't leave room for human error
- Staff development and empowerment
 - Decreases the learning curve necessary to learn configurable joins from scratch



Accessing the Query Library

slate

Underscore Higher Ed

Search...

Queries

Search Queries...

New Query

Quick Query

Name	Folder	Base	Updated
Applicant Dashboard	System	Person	03/23/2022
Application Dashboard	System	Application	04/20/2022

Queries

Queries (preview)

Reports

Widgets

Voyager

Users

Higher Ed, Underscore

Personal queries

Include shared queries

Folders

All Folders

System

Underscore

Exclude archived

Include archived

Estimate Output

Query Library Buildout

Exports, filters, and joins created here will be shared with the users and roles specified under Edit Permissions.

User Underscore Higher Ed
Base Configurable Joins - Person

- Edit Properties
- Edit Permissions
- Preview Results
- Display SQL
- Save Copy

Exports

Missing Checklist Items (Rank 1 application)	Concatenate
Received Checklist Items (Rank 1 application)	Concatenate
Events List (all registration statuses)	Concatenate
Matriculation Term & Round Term	Concatenate
Residency	Concatenate
Academic Interests	Concatenate
School Information (Rank 1)	Concatenate
Parent Information	Concatenate
Term	Concatenate
Decision Plan	Concatenate

- Export
- Literal
- Custom SQL

Rename Exports

Filters

Ping hits within 7 days	Exists
Not a test record, opt out, or deceased	Not Exists
Admits + deposits	Exists
Admitted but not deposited	Exists
Admitted for at least 7 days	Exists
Waitlist offered	Exists
Waitlist spot accepted	Exists

- Filter
- Custom SQL

Using Query Library Exports and Filters

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Underscore Higher Ed

Search...

Queries

Search Queries...

New Query

Quick Query

Name	Folder	Base	Updated
By Origin Source	Underscore	Person	03/08/2022
Double Bookers	Underscore	Person	04/05/2022
Dual Enrollment	Underscore	Person	03/09/2022
Dual Enrollment App PDF	Underscore	Application	03/16/2022
Event and Scheduler Templates	Underscore	Form	03/08/2022
Filter for more than one event reg	Underscore	Person	04/05/2022
Forms with No Responses in Two Years	Underscore	Form	03/03/2022
Materials Uploaded	Underscore	Applications	05/04/2021
Niche imports that need to become Inquiries	Underscore	Person	04/13/2022
Origin Source List	Underscore	Lookup Origin Source Type	03/01/2022
Records by Origin Source	Underscore	Prospects (including opt-outs)	03/09/2022
Records Missing Admission Type	Underscore	Prospects (including opt-outs)	11/17/2021
Records Missing Entry Term	Underscore	Prospects (including opt-outs)	11/17/2021
Records Missing Origin Source	Underscore	Prospects (including opt-outs)	03/18/2022
Records Missing Origin Source - Working Copy	Underscore	Prospects (including opt-outs)	03/18/2022
Records With First Source = App AND Prospect/Inquiry Status Date	Underscore	Prospects (including opt-outs)	11/17/2021
Unconcluded Events	Underscore	Form	03/02/2022

Queries

[Queries \(preview\)](#)

[Reports](#)

[Widgets](#)

[Voyager](#)

Users

Higher Ed, Underscore

Personal queries

[Include shared queries](#)

Folders

[All Folders](#)

[System](#)

Underscore

Exclude archived

[Include archived](#)

[Estimate Output](#)

Slate by Technolutions (UNC Asheville)

maia3 / mars / nca

2

Tips & Tricks

1) There is **not** a live link between the query library and where it is used.

Query Library ≠ Live Link

Live Link

- Content Block
- Translation Code

Not a Live Link

- Deliver Template
- Copy and paste
- Query Library

What does this mean?

Updating a query library export **will not** update any of the existing places that export is used.

Adjusting a Query Library Filter

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Underscore Higher Ed

Search...

All Queries

Quick Query

User

Base

Underscore Higher Ed

Configurable Joins - Person

Run Query

Preview Results

Display SQL

Save Copy

Exports

Person Name

Export

Literal

Custom SQL

Rename Exports

Filters

Matching Rows: 985,779

Sorts

Joins

2) When in doubt, build in the query library.

2) When in doubt, build in the query library.

It's currently not possible to move a standard query into the query library.







3) Sharing is caring.

3) Sharing is caring?

Query library filters/exports act as pinned filters/exports, so don't unnecessarily clutter up their view.

4) Be descriptive.

4) Be descriptive.

NC Non-Rural Counties		Exists
NC Rural Counties		Exists
Fall 2022 FR Prospects & Applicants		Exists
Attended any event (virtual or in-person)		Exists
Registered for any future event (virtual or in-person)		Exists
Different matric term than round term		Comparison Application

5) Be strategic with naming.

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Query Library

New Library

Search Query Libr

Name	Base
Commonly Used (Application)	Application
Commonly Used (Person)	Person
Event Statuses	Person
Parents	Relation
Statuses	Person
Superscores	Person
Territories	Person

Insert Query Part

Search

Groups

☒ Library Exports

☒ Direct Exports

☒ Extended Exports

Library Exports

Commonly Used (Person)

Select All	Name	Preferred	Email
Expected Start Term	Expected Student Type	UG Area of Interest 1	School Na
Staff Assigned	Email	Mobile Phone	ESF in the
Visit Count	Visit History	Recent Emails and Phone Calls	Texting Op
Birthdate (Age)			

Statuses

Status

Superscores

Select All	SAT Superscore (Verified Score...	Highest SAT Math Score (Verifi...	Highest SA
ACT Superscore (Verified Score...	Highest ACT English Score (Ver...	Highest ACT Math Score (Verifi...	Highest AC
Highest ACT Science Score (Ve...			

Commonly Used (Person)

Commonly Used (Application)

Statuses

Superscores

5) Be strategic with naming.

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Emma Hayek

Search...

Quick Query

User

Base

Exports

Filters

Matching Rows: 318,06

Sorts

Insert Query Part

Search

Groups

Library Filters

Direct Filters

Extended Filters

Direct Filters

Person

Reference ID	Created Date	Updated Date
Active Status	Age (as of date)	ASC ID
ASC Lead ID	Athletic Indicator	Athletic Interest
Banner ID	Birthdate	Citizenship (Primary)
Citizenship (Secondary)	Citizenship Status	Concentrations
Country of Birth	Current Age Based on Birthdate	Deceased
Deceased Date	Disciplinary Indicator	Expected Area of Interest
Expected Start Term	Expected Student Type	Expected UG Program of Study
Fee Waiver	Gender	Graduate Expected Degree Program
Graduate Expected program of study	GUID	Hear about us
Hispanic	Hispanic Origin	Honors
IPEDS Classification	Legacy	Military Status
Name Contains	Online Inquiry Indicator	Partial Match
Password/PIN Exists	Permanent Resident	Phi Theta Kappa
PIN Created/Reset Timestamp	Population	Preferred Name Exists

Continue

Cancel

Run Query

Preview Results

Display SQL

Save Copy

Export

Literal

Custom SQL

Rename Exports

Filter

Custom SQL

OR

NOT

(

)

Sort

3

Use cases

Decision Codes

Decision Codes

[Version History](#)

Search Decision Codes...

Name	Export Value	Code	Status
Insert			
Accepted	CC	CC	Edit
Administrative Withdrawal	AW	AW	Edit
Admissions Safety Review Commit	CS	CS	Edit
Admit Declined (Withdrawn)	WA	WA	Edit
Deferred After Deposit	DD	DD	Edit
Deferred/Accepted/No Deposit	DF	DF	Edit
Denied Admission	RJ	RJ	Edit
Deposit Pending (Accepted Offer)	DP	DP	Edit
Deposit Received	DR	DR	Edit
Deposit Waived	DW	DW	Edit
Jump Start	JS	JS	Edit
Jump Start Wait List	JW	JW	Edit
Referred	RF	RF	Edit
Referred - Semester Grades	RG	RG	Edit
SOAR	AR	AR	Edit
University Merit Award	FA	FA	Edit
Wait List	WL	WL	Edit
Wait List - Remained	WL	RW	Edit
Withdrawn After Deposit	WD	WD	Edit
Withdrawn Before Decision	WN	WN	Edit
Incomplete Close-Out	IW	IW	Inactive Edit

Decision Codes

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Underscore Higher Ed

Search...

All Queries

Quick Query

User

Base

Underscore Higher Ed

Configurable Joins - Person

Run Query

Preview Results

Display SQL

Save Copy

Exports

Person Name

Export

Literal

Custom SQL

Rename Exports

Filters

Check Logic

Matching Rows: 985,779

Sorts

Filter

Custom SQL

OR

NOT

(

)

Sort

Joins

Geographic Definitions

All Queries

Quick Query

User

Underscore Higher Ed

Base

Configurable Joins - Person

Exports

Filters

Check Logic

Matching Rows: ...

NC Rural Counties

Exists

Sorts

Edit Part

Status

Active

Name

NC Rural Counties

Source

Subquery Filter

Type

Dependent subquery

Aggregate

Exists

Exports

Export

Filters

Filter

NOT

(

OR

)

Join

Join

Addresses

Addresses / Rank Overall

Rank = 1

Addresses / US County

IN NC - Alamance, NC - Alexander, NC - Alleghany,...

Save

Delete

Cancel

Geographic Definitions

All Queries

Quick Query

User
Base

Underscore Higher Ed

Configurable Joins - Person

Exports

Filters

Check Logic

Matching Rows: ...

NC Rural Counties

Exists

Sorts

Edit Part

StatusActive

NameNC Rural Counties

SourceSubquery Filter

TypeDependent subquery

AggregateExists

ExportsExport

FiltersFilterNOT(OR)Join

JoinAddresses

Addresses / Rank OverallRank = 1

Addresses / US CountyIN NC - Alamance, NC - Alex

Save

Delete

Cancel

Edit Part

StatusActive

NameUS County

SourceNested Filter / Addresses / NC Rural Counties

MemoReturns US addresses in the selected counties

US CountyIN

Search...

Show Selected

NC - Alamance

NC - Alexander

NC - Alleghany

NC - Anson

NC - Ashe

NC - Avery

NC - Beaufort

NC - Bertie

NC - Bladen

NC - Burke

Save

Delete

Cancel

Feeder Schools

All Queries

Quick Query

User

Underscore Higher Ed

Base

Configurable Joins - Person

Exports

Filters

Check Logic

Matching Rows: 5,339

Gear Up Schools

Exists

Sorts

Edit Part

Status

Active

Name

Gear Up Schools

Source

Subquery Filter

Type

Dependent subquery

Aggregate

Exists

Exports

Export

Filters

Filter

NOT

(

OR

)

Join

Join

Schools

Schools / Rank Overall

= 1

Schools / Code

IN LIST 343700, 344270, 341931, 344064, 341928, 34274...

Save

Delete

Cancel

Residency Claim & Residency Verified Mismatch

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Underscore Higher Ed

Search...

All Queries

Quick Query

User

Base

Underscore Higher Ed

Configurable Joins - Person

Run Query

Preview Results

Display SQL

Save Copy

Exports

Export

Literal

Custom SQL

Rename Exports

Filters

Check Logic

Matching Rows: 1,345

Residency Claim and Code Mismatch

Comparison

Translation from Claim to Code != Residency Code

Sorts

Filter

Custom SQL

OR

NOT

(

)

Sort

Joins

Program Deadlines

[Query Library](#)

Application Deadlines

Exports, filters, and joins created here will be shared with the users and roles specified under Edit Permissions.

User [Underscore Higher Ed](#)
Base Configurable Joins - Application Deadlines

Exports

Filters

Deadline Passed (last updated 12-14-2021) Exists

Joins

Edit Part

StatusActive

NameDeadline Passed (last updated 12-14-2021)

SourceSubquery Filter

TypeDependent subquery

AggregateExists

Exports

Export

Filters

Filter

NOT

(

OR

)

Join

DNP Application (6/15/2022)

OR

Nurse Practitioner Spring 2023 (8/31/2022)

OR

Nurse Practitioner Spring 2022 (8/31/2021)

OR

Nurse Practitioner Fall 2022 (2/28/2022)

OR

Save

Delete

Cancel

- Edit Properties
- Edit Permissions
- Preview Results
- Display SQL
- Save Copy

- Export
- Literal
- Custom SQL

[Rename Exports](#)

- Filter
- Custom SQL

- Join

Program Deadlines

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Underscore Higher Ed

Search...

[Query Library](#)

Application Deadlines

Exports, filters, and joins created here will be shared with the users and roles specified under Edit Permissions.

User

Base

[Underscore Higher Ed](#)

Configurable Joins - Application

Edit Properties

Edit Permissions

Preview Results

Display SQL

Save Copy

Exports

Export

Literal

Custom SQL

[Rename Exports](#)

Filters

Deadline Passed (last updated 12-14-2021)

Exists

Filter

Custom SQL

Joins

Join

Looking at person-scoped fields for prospects/inquiries and app-scoped fields for applicants

Filters

Fall 2022 FR Prospects & Applicants

Ping hits within 7 days

Exists

Not a test record, opt out, or deceased

Admits + deposits

Exists

Admitted but not deposited

Exists

Waitlist offered

Exists

Waitlist spot accepted

Exists

First generation

Not Exists

Gear Up Schools

Exists

NC Non-Rural Counties

Exists

NC Rural Counties

Exists

Attended any event (virtual or in-person)

Registered for any future event (virtual or

Different matric term than round term

Residency Claim and Code Mismatch

Missing International Affidavit of Support

Have Received International Affidavit of S

Incomplete Application

Exists

Edit Part

Status

Active

Name

Fall 2022 FR Prospects & Applicants

Source

Subquery Filter

Type

Dependent subquery

Aggregate

Exists

Exports

Export

Filters

Filter

NOT

(

OR

)

Join

Person-scoped fall 2022

OR

App-scoped fall 2022

Save

Delete

Cancel

Looking at person-scoped fields for prospects/inquiries and app-scoped fields for applicants

Filters

Fall 2022 FR Prospects & Applicants

Ping hits within 7 days

Not a test record, opt out, or deceased

Admits + deposits

Admitted but not deposited

Waitlist offered

Waitlist spot accepted

First generation

Gear Up Schools

NC Non-Rural Counties

NC Rural Counties

Attended any event (virtual or in-person)

Registered for any future event (virtual or in-person)

Different matric term than round term

Residency Claim and Code Mismatch

Missing International Affidavit of Support

Have Received International Affidavit of Support

Incomplete Application

Edit Part

StatusActive

NameFall 2022 FR Prospects & Applicants

SourceSubquery Filter

TypeDependent subquery

AggregateExists

ExportsExport

FiltersFilter

Person-scoped fall 2022

OR

App-scoped fall 2022

Save

Delete

Cancel

Edit Part

StatusActive

NamePerson-scoped fall 2022

SourceNested Subquery Filter / Fall 2022 FR Prospects & Applicants

TypeDependent subquery

AggregateExists

ExportsExport

FiltersFilter NOT (OR) Join

Status NOT IN Applicant

Intended Entry Term IN Fall 2022

Admission Type IN Freshman

Save

Delete

Cancel

Looking at person-scoped fields for prospects/inquiries and app-scoped fields for applicants

Filters

Fall 2022 FR Prospects & Applicants

Ping hits within 7 days

Not a test record, opt out, or deceased

Admits + deposits

Admitted but not deposited

Waitlist offered

Waitlist spot accepted

First generation

Gear Up Schools

NC Non-Rural Counties

NC Rural Counties

Attended any event (virtual or in-person)

Registered for any future event (virtual or in-person)

Different matric term than round term

Residency Claim and Code Mismatch

Missing International Affidavit of Support

Have Received International Affidavit of Support

Incomplete Application

Edit Part

Status

Name

Source

Type

Aggregate

Exports

Filters

Active

Fall 2022 FR Prospects & Applicants

Subquery Filter

Dependent subquery

Exists

Export

Filter

Person-scoped fields

OR

App-scoped fall 2022

Save

Delete

Cancel

Edit Part

Status

Name

Source

Type

Aggregate

Exports

Filters

Active

App-scoped fall 2022

Nested Subquery Filter / Fall 2022 FR Prospects & Applicants

Dependent subquery

Exists

Export

Filter

NOT

(

OR

)

Join

Join Application by Rank Rank = 1

Status IN Applicant

Application by Rank / Matriculation Term IN Fall 2022











Application by Rank / Student Type IN New First Time Freshmen

Save

Delete

Cancel

Exports

Missing Checklist Items (Rank 1 application)		Concatenate
Received Checklist Items (Rank 1 application)		Concatenate
Events List (all registration statuses)		Concatenate
Matriculation Term & Round Term		Concatenate
Residency		Concatenate
Academic Interests		Concatenate
School Information (Rank 1)		Concatenate
Parent Information		Concatenate
Term		Concatenate
Decision Plan		Concatenate

Exports

Missing Checklist Items (Rank 1 application)  Concatenate

Received Checklist Items (Rank 1 application)  Concatenate

Events List (all registration statuses)  Concatenate

Matriculation Term & Round Term  Concatenate

Residency  Concatenate

Academic Interests  Concatenate

School Information (Rank 1)  Concatenate

Parent Information  Concatenate

Term  Concatenate

Decision Plan  Concatenate

Edit Part

Status Active 

Name Events List (all registration statuses) 

Source Subquery Export

Type Dependent subquery 

Output Concatenate 


Row Separator \n = New Line; \t = Tab; \\ = Escaped Backslash

Row Offset Row Limit

Exports  Export  

App-scoped events 

Add another line break if attended both scopes of events 

Person-scoped events 

Filters  Filter  NOT (OR)  Join 



















Sorts  Sort 

Save



















Delete

Cancel

Filters

Fall 2022 FR Prospects & Applicants		Exists
Ping hits within 7 days		Exists
Not a test record, opt out, or deceased		Not Exists
Admits + deposits		Exists
Admitted but not deposited		Exists
Waitlist offered		Exists
Waitlist spot accepted		Exists
First generation		Not Exists
Gear Up Schools		Exists
NC Non-Rural Counties		Exists
NC Rural Counties		Exists
Attended any event (virtual or in-person)		Exists
Registered for any future event (virtual or in-person)		Exists
Different matric term than round term		Comparison Application by Rank Matriculation Term != Lookup Round Export Value 3
Residency Claim and Code Mismatch		Comparison Translation from Claim to Code != Residency Code
Missing International Affidavit of Support		Exists
Have Received International Affidavit of Support		Exists
Incomplete Application		Exists

Filters

- Fall 2022 FR Prospects & Applicants  Exists
- Ping hits within 7 days  Exists
- Not a test record, opt out, or deceased  Not Exists
- Admits + deposits  Exists
- Admitted but not deposited  Exists
- Waitlist offered  Exists
- Waitlist spot accepted  Exists
- First generation  Not Exists
- Gear Up Schools  Exists
- NC Non-Rural Counties  Exists
- NC Rural Counties  Exists
- Attended any event (virtual or in-person)  Exists
- Registered for any future event (virtual or in-person)  Exist
- Different matric term than round term  Comparison Appli
- Residency Claim and Code Mismatch  Comparison Transla
- Missing International Affidavit of Support  Exists
- Have Received International Affidavit of Support  Exists
- Incomplete Application  Exists

Edit Part



Status

Active

Name

Ping hits within 7 days

Source

Subquery Filter

Type


Dependent subquery


Aggregate

Exists

Exports


Export





Filters

Filter





NOT


(

OR

)

 Join





Join

Pings

Pings / Timestamp >= today-7

Save

Delete

Cancel

Additional Ideas for Entire Query Libraries

- Commonly used exports and filters for communications
- Commonly used exports and filters for counselors
- Commonly used exports and filters for advisors
- Portal content block filters

Additional Ideas for Individual Exports and Filters

- International vs domestic
- 3 most recent interactions
- Current status field encompassing the whole funnel (person status + app status + decision codes)
- Scholarship statuses
- Organization contact(s) of rank 1 school

4

Questions + Answers

Resources

Contact

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Learn More

CarnegieHigherEd.com

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rwalsh@unca.edu

Thank You!

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