SWIMS QUERY BUILDER MODULE
"HELP SHEET"

GETTING STARTED

Following is basic information/guidance to help you get started using the SWIMS Query Builder module.

When you open the Query Builder module, the first screen displayed is the "Query Builder Main" screen. It allows you to run an existing query or start a new query. Copies of queries that have been saved will be displayed as "Favorites" on this screen.

The buttons on the toolbar, located on the left side of the screen, will tell you what function they perform by holding the cursor over the buttons. See explanation below.

- The Green and white button or **EXECUTE** button allows you to run/execute a saved query. Simply click on a query you want to run and then click on the Execute button. The query results are displayed on the right side of the screen.
- The orange globe **VIEW MAP** button will show a map of a saved query if the query contains "mapped" (spatial) fields/attributes.
- The yellow paper **NEW QUERY** button, allows you start/create a new query.
- The pink gear box **MANAGE QUERIES** button allows you to manage existing/saved queries, or create a new one.

Most of the time you will be selecting the:

- **NEW QUERY** button, when you click it, it opens the "Query Editor" screen where you can start/create a new query); **or the**
- **MANAGE QUERIES** button; gives you access to your "Master Query List". When you click this button, the right side of the screen will re-configure. It will then display a "second" toolbar with buttons. Also displayed will be a list of any queries previously saved. This is your "Master" list of queries.

The buttons on the toolbar perform different functions:

- The **NEW QUERY** button, allows you start/create a new query.
- The **EDIT QUERY** button, allows you to change an existing query. Simply select/click on a query in the Master list, then hit the Edit Query button. The selected query will then open, allowing you to edit/change the query.

STARTING/BUILDING A QUERY

Once you have decided to start a new query, hit the **NEW QUERY** button, the screen will re-configure, you will then be setting at the "Query Editor" screen. This screen will allow you to choose fields of data for your query.

Step One - CURRENT INFO TYPE

On the left side of the screen you will see the "Current Info Type" heading. Beneath it will be a drop down box, which contains the different SWIMS information types that you can query. By default, "Land and Water Projects" will be the displayed info type. Beneath the drop down box will be a list of all the different fields (attributes) associated with Land and Water Projects that you may query.

<u>NOTE</u>: Queries can only be built within the chosen Info Type, you cannot query "across" other info types. Changing the info type will result in erasing any of the attributes that you have selected. When you change an info type, SWIMS will display a warning box asking you if you want to proceed. Selecting 'Yes" will allow you to choose a different info type, selecting No, will keep you at the current info type.

Step Two - CHOOSING ATTRIBUTES

Once your desired info type is selected, you then select the attributes to be displayed in the query results. To do this, simply click on, drag and then drop the attributes into the **RESULTS COLUMN** box**.**

<u>Helpful Hint:</u> You know the attribute has been successfully dropped into the Results Column box as soon as the border around the Results Column box is highlighted with a thick black border. At this time you can release the mouse control.

You may drag as many of the attributes into the Results Column box as you like. The order, in which they are displayed in the box, is the same order the data will be displayed in the query results. So if you want data to be displayed in a certain order in your query results, simply arrange the attributes in the box in that same order.

When you have finished selecting all the attributes for your query, you may then want to select how the query results data is sorted (e.g. sort by last name). To do this, simply select <u>from the attribute list on the left side of the screen</u>, the attribute(s) you want to use to sort with. Click on, drag and drop them into the **SORT ORDER** box.

<u>Important Note</u>: You must select the attribute(s) to be used for sorting from the attribute list on the left side of the screen, not from the Results Column box above. Once the attribute has been dropped in the Sort Order box you may then click the attribute to change A-Z to Z-A if needed. You may use multiple attributes to sort with if needed. The data results will be sorted (left to right) by the first attribute, then the second, and so on.

Step Three – SETTING A FILTER

Depending on the query you are building, you may also need to set a filter. To do so, select from the attribute list on the left side of the screen, the attribute you wish for filtering. Click on, then drag and drop the attribute into the long, narrow, gray box located under the **FILTER CRITERIA** heading.

Helpful Hint: You may drop and release the attribute as soon as the gray box turns "yellow". After the attribute is dropped in the box, additional data choices (dates, texts, categories, etc.) can be used to further refine the query results.

Important Note: Please keep in mind that in order to build a query, you only need to populate the **RESULTS COLUMN** box**.** The SORT ORDER and FILTER CRITERIA boxes only need to be populated when a specific type of result is desired.

Step Four – RUNNING A QUERY / EXPORTING RESULTS

After all the needed attributes are placed in the boxes, simply hit the **EXECUTE** button and the query results will be displayed in a new screen. If you want to change something in the query, close the results screen by clicking on the "X" in the upper right hand corner. You will be returned to the "Query Editor" screen. Then change/edit the query and re-run.

Once the query results contain the data you want, the results can be "Exported" if desired. To do this click on the **EXPORT** button located on the upper right hand corner of the query results screen. The query results are then exported to an MS Excel spreadsheet document.

Step Five – SAVING A QUERY

You may want to save some of the queries you build so they can be used/viewed in the future. To save a query after it has been created, enter a name for the query in the "Query Title" box at the top of the Query Editor screen. You must also enter a description for the query in the "Description" box.

Important Note: Both the "Query Title" and "Description" boxes must be populated in order to save a query.

Once information is entered in both boxes, click the "Save" button on the toolbar at the top of the Query Editor screen. After the **SAVE** button is pressed, a copy of the query is saved in your Master query list and in Favorites list. Both of these lists are found on the Query Builder Main (first) screen of the module.