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Student Financial Assistance

Session 21

Making Queries and Multiple Entry Work for You in Direct Loans (Hands-On)



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Introduction

- Who will benefit from this session
- Evaluations
- Questions

Agenda

- Query
- Lists and Reports
- Multiple Entry
- User Database
- Hands-On
- Questions





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Query



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Definition of Queries

- Utility that lets you define criteria for selecting records from the database
- Logical statements or a predefined set of criteria that describes the desired student population
- Use a query to select or filter data

Types of Queries

- Pre-Defined
 - Can not be deleted
 - Can be modified and saved with new titles
- User Defined
 - Can be deleted and modified

Basic Setup

- Creating a Query
 - Append adds the Field | Operator | Value
 - Prompt at Execution
 - Parameter Query Entry
 - Using Parentheses
 - You can use parentheses to create more complicated queries
 - Save checks for unnecessary parentheses



Basic Setup

- **Modifying a Query**
 - Highlight any line in the query
 - Modify
 - Field / Operator / Value
 - And / Or operands
 - Click on Change to replace the line or
 - Click on Remove to delete



Query on Unusual Fields

- Origination and Actual Disbursement Reject Codes
 - Stored in database using commas
 - Orig Rejects: 16,26,17,11,06
 - Disb Rejects: M,J,27,30
 - Query could be defined one of two ways:
 - Last Name Like Prompt at Execution
 - Actual Disbursement Not Like Null



Query on Unusual Fields

- TRUE / FALSE Fields
 - Enter TRUE or FALSE rather than 'Y'es or 'N'o
- Last Name Range
 - The Current Pre-Defined query for last name range is defined as follows:
 - Last Name >= Prompt at Execution AND
 - Last Name <= Prompt at Execution



Lists and Measurement Tool Reports

Lists and MT Reports

- Status of a group of loan records, promissory notes, and disbursements
- Output format is similar for each type of list
- List includes a total of records selected
- Selection Criteria can be used to specify what records appear on the list





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Multiple Entry



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Multiple Entry

- Allows you to quickly update information on a similar group of students
- Update important fields for a group of students
 - manually enter multiple SSN's or import file
 - selection criteria using select records or queries





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User Database



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User Database

- Add your own questions, or user-defined fields to the student record
- EDExpress stores these fields in the User Data database
- Create up to 255 fields for data specific to your institution



Hands-On Exercise

Further Assistance

CPS Customer Service can be reached by:

Phone: 800-330-5947

Email: cps@ncs.com

Or SFATECH: sfatech@inet.ed.gov

We appreciate your feedback and comments.





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Questions?



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