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Introduction

Preface

This desk reference describes the general procedures for using the Quality Analysis Tool for Windows (QA Tool) software. It is intended to provide basic instructions and is not intended to be comprehensive. For additional information, see the online Help within the QA Tool software.

QA Tool helps you analyze initial and paid on ISIR data. These two transactions are displayed side by side for you to see and compare the fields that were corrected. Using EFC ranges and increments of change, you can analyze a specific student population to determine which fields were corrected most often and how those changes affected the students’ EFCs.
Setup

Logging In to QA Tool for Windows

To log in to QA Tool for Windows:

1. From the Windows Startup/Programs menu, click EDESuite and click Quality Analysis Tool for Windows.

2. If you see the Startup Information dialog box, read the messages displayed there, then click Close.

3. Type your user ID and press Tab (first time users, your user ID is SYSADMIN).

4. Type your password (first time users, your password is SYSADMIN).

5. If this is your first login, type a new user ID and password.

6. If your password needs to be changed, type your new password, and then type your password again in the Verify Password field.

7. Click OK.
System

System Setup allows you to define the settings that QA Tool uses. You must define these settings before you can enter student data.

To define system settings:

1. Click Tools, Setup, System on the menu bar.

2. Type your OPE ID#.

3. Type your school’s name.

4. Mark the checkbox if you are an EDExpress for Windows user.

5. Mark the Return to Dialog checkbox if you want to return to the dialog box after printing, exporting, or importing instead of the QA Tool main screen.

6. Choose Single or Multiple as your default print setting. Select Single if you usually print one record at a time. Select Multiple if you usually print multiple records.

7. Click the down arrow to select Printer, File, or Screen as the default destination for reports.

8. Click OK to save the settings.

9. Click OK to continue.

Important Note

You can change the Single/Multiple print option for a specific print job at any time, but the default setting remains the same until you change it in System Setup.
Verification Edit Profile

A verification edit profile helps you identify students during the verification selection process. A profile uses queries like these to find students in the database:

- EFC Changed
- Pell Eligible
- Pell Ineligible
- Single Students with Children or Dependents

You can create profiles that contain any combination of non-parameter queries. (A parameter query is a query that prompts you for specific data when you run it.) All non-parameter queries are available in the Verification Edit Profile dialog box. If you do not see a query that you need, you can go to Tools, Query to create it. See the “Queries” section in this desk reference for information on queries.

Each profile is identified by a code.

To create a verification edit profile:

1. Click Tools, Setup, Verification Edit Profile on the menu bar.
2. If this is the first format you are creating, skip to step 3. Otherwise, click Add.
3. Type a code to identify the profile you are creating (the code must be unique).
4. Type a description of the profile.
5. Mark each checkbox in the Select column on the queries you want to use for the profile. Or in the Select column, click the row of the query you want to be included, and click the Select button. Click Select All if you want to include all queries in the profile.
   
   You can select as many queries as you need to identify the target student population.
7. Click the Resequence button to shift all selected queries to the top of the list for easy viewing.
8. Click OK to save the profile.
File Management

File Management Setup defines the default folders and paths for your import and export files.

We recommend that you use the default setting C:\IAM\DATA, but you can specify another location. The default folders can be the same for both or different. You can also change the default file names.

To set up File Management for both the Import and Export tabs in the File Management dialog box:

1. Select Tools, Setup, File Management from the menu bar.

2. Click File Management.

3. (optional) Click Default [Export or Import] Directory. This dialog box allows you to change the directory (folder) location of your export or import files, if necessary.

4. (optional) Click the ellipsis (…) button to the right of the File Path column to locate and select different folders.

5. (optional) Click in the cells in the File Name column to change the location for specific types of export or import files. Use the scroll bars to view the entire list of files.

6. Click OK to save the settings.
User Database

Use this option to create fields for your User Database. You can create as many fields as you need for data specific to your school that do not appear on the ISIR, such as high school GPA.

You can use these fields for queries, reports, and exports. The fields you create are stored in your QA Tool database.

To create fields for your User Database:

1. Click **Tools, Setup, User Database**. QA Tool warns you to close all network copies of QA Tool. When all network copies are closed, click **OK** to continue. The User Database Setup dialog box appears.

2. Begin typing the field name. QA Tool inserts the text in the first empty cell in the Field column. You can create up to 255 fields. Field names must begin with a letter, not a number, and can be 20 characters in length.

3. Click in the adjacent cell in the Type column and click the **down arrow** to select field type (Date, Long Integer, Text, or Boolean).

4. Click in the adjacent cell in the Length column and type the field length. Fields can have up to 40 characters.

5. Click in the adjacent cell in the Description column and type a description for the field.

6. (optional) Press **Enter** or click **Add** to add another field.

7. Click **OK** to save your changes.

**Important Notes**

- The field name must begin with a letter, not a number. Boolean values are automatically set to N for False.

- You can modify user-defined fields if no records in your database contain data for the fields. If a record in the database contains data for a user-defined field, you must delete all of the fields and recreate them to modify them.
User Security

User Security setup is accomplished in two steps. First, determine who will use the software and which functions they will use. Then, create user IDs with the appropriate level of access for each user.

To set up user security:

1. Click **Tools, Setup, Security Users** on the menu bar.

2. Type the new user ID in the User ID field and press **Tab**.

3. Click the **down arrow** next to the Group Name field and click on the group name that describes the access rights you want this user to have.

4. Type the password for the user in the **Password** field.

5. Type the password for the user again in the **Verify Password** field.

6. Click **Save** to add the user to the database. QA Tool refreshes the screen so you can add more users.

7. Click **Add** to create more user IDs and passwords.

8. Click **OK** when you are finished adding users.

**Important Note**

You create an initial password for each user, but users can change their passwords each time they log in to QA Tool.
Custom Formats

A format is like a template that you can use repeatedly. Each custom format has a unique code that identifies it.

You may want to create custom formats to help you extract the specific data you need.

By using formats, you can print the same custom report as many times as you need to without having to set up the report each time. You choose the fields for the report only once—when you create the format.

You can create as many custom formats as you need to print the specific data you need.
**Custom Reports**

Custom reports are generated using formats that you create in Setup. You use one format for each custom report.

By using formats, you can print the same custom report as many times as you need to without having to set up the report each time. You choose the fields for the report only once, when you create the format. You can create as many custom formats as you need to print the specific data you need.

Custom reports allow you to see groups of data specific to your needs that are not available on the reports provided in the software.

*To create a custom report:*

1. Click **Tools, Custom Formats, Custom Reports** on the menu bar.
2. Click **Add**.
3. Type a two-character document code to identify the format.
4. Type a description for the format.
5. In the Available Fields list, click on each field you want to include in the report and click **Add**.
6. When you have finished choosing fields, click **OK**.
7. Click **Save** to save the format, then click **OK** to continue.
8. (optional) Repeat steps 2 through 7 to create more formats.
9. Click **OK** to return to the QA Tool main screen.

*Important Note*

QA Tool prints the fields on a custom report in alphabetical order.
Selected Fields

Use this option to create formats for viewing data on the Transaction Comparison tab and for printing reports that help you identify trends in your population.

If you do not know the trends in your population, a good strategy would be to select all fields, run a report, and see if you can identify trends.

Then you can create more formats that narrow the fields and magnify the trends until you begin to see meaningful data.

To create formats:

1. Click Tools, Custom Formats, Selected Fields on the menu bar.

2. Type a six-character code to identify the format.

3. Type a description for the format.

4. In the list of fields, click the checkbox to the left of each field you want to include. The fields are numbered in sequence as you select them.

   To move all selected fields to the top of the grid in sequential order, click Resequence. To return the fields to ISIR order in the grid, close the dialog box and open it again. If you saved the format, the fields you selected still have their sequence numbers in the Sequence column, even though the field list has returned to ISIR order.

5. Click Save to save the format, then click OK to continue.

6. (optional) Click Add, then repeat steps 2 through 5 to create more formats.

7. Click OK to return to the QA Tool main screen.

Important Note

The fields are displayed on the Transaction Comparison tab or print on the report in the order in which you selected them when you created the format.
**Field Increments**

The Field Increments option creates formats for specific EFC fields that determine the number and corresponding percentage of the number of corrections for the selected field, as well as the number of times the EFC increased, decreased, or remained unchanged due to a change in the field.

Generally, when you are preparing to run a report for a field for the first time and you are not sure what you are looking for, you will want to create a Field Increment format that has a wide range between the minimum and maximum values and a large increment, so you can get an idea of how your data looks overall.

Then, you will want to set up more Field Increment formats that decrease the minimums, maximum, and increments accordingly, so you can pinpoint specific populations with high numbers of corrections for that field.

*To create field increment formats:*

1. Click **Tools, Custom Formats, Field Increments** on the menu bar.
2. Type a six-character code to identify the format.
3. Type a description for the format.
4. Click the **down** arrow next to the Field box and choose the field you want to use for the format.
5. Click in the Minimum, Maximum, and Increment boxes and type the values you want to use.
6. Click **Save** to save the format, then click **OK** to continue.
7. (optional) Click **Add**, then repeat steps 2 through 6 to create more formats.
8. Click **OK** to return to the QA Tool main screen.
Example

The increment you use should be proportionate to the minimum and maximum values. For example, if the field you are using is Father’s Income and you set the minimum at 1, the maximum at 6,000, and the increment at 1,000, the range would be too narrow to capture the majority of your population and the increment too large to capture any meaningful data. If you instead set the minimum at 1, the maximum at 300,000, and the increment at 100,000, then you would capture the majority of your population and identify where the majority of your population falls.

Then, to identify a trend, you would probably run the report again with an increment of 10,000 using the range that includes the majority of your population (for example, 0 to 100,000). Zero counts as a number, so if you set the minimum value at 0, the maximum value at 100,000, and the increment at 10,000, the ranges returned would be 0 to 9,999, 10,000 to 19,999, etc.

The maximum value you choose might be adjusted upward on some reports to accommodate the increment you choose.
EFC Ranges

The EFC Ranges option creates formats for various EFC ranges that determine differences between the Initial and Paid On values of selected fields, as well as the EFC.

The ranges from the Pell Scheduled Awards Table are included as predefined EFC Range formats under codes EFC01 through EFC31.

Four more predefined codes are also included:

- Initial Pell Ineligible,
- All Initial Pell Eligible by Pell Cell,
- All Initial Pell Eligible, and
- All Ranges.

To create EFC range formats:

1. Click **Tools, Custom Formats, EFC Ranges** on the menu bar.
2. Type a six-character code to identify the format.
3. Type a description for the format.
4. Click the **down** arrow next to the Field box and choose the field you want to use for the format.
5. Click in the Minimum and Maximum boxes and type the values you want to use.
6. Click **Save** to save the format, then click **OK** to continue.
7. (optional) Click **Add**, then repeat steps 2 through 6 to create more formats.
8. Click **OK** to return to the QA Tool main screen.
Important Notes

- Two reports in QA Tool are Pell-based only: the Corrected Records in Initial EFC Range report and the Pell Corrected Records report. Note that these reports show only changes to the EFC relative to the ranges defined by EFC Range Codes EFC01 through EFC31 (Pell Scheduled Awards Table).

- The Pell Scheduled Awards Table uses increments of 100. You might want to make your own EFC Range formats with larger increments so you can see EFC changes on a broader scale, but be aware that you may miss changes that affected awards. You can also make increments smaller than 100, but the difference probably will not be significant.
Importing and Validating Data

Importing Data

You must use the Import function to enter the data you want to analyze. The types of data you can import are:

- **ISIR Data – ASCII Format.** If you did not use 2002-2003 EDExpress for Windows, you can import a flat ASCII file in ISIR format.

- **2002-2003 EDExpress Database.** If you use 2002-2003 EDExpress for Windows, you can import ISIR data directly from your EDExpress database. You can construct special queries to use for importing records from your EDExpress database. See “Using Queries to Import Records from EDExpress” in this desk reference for more information.

- **User Defined Data** imports the user data you saved in a separate ASCII file according to the User Data record layout.

Manual Data Entry

The only student data field you must enter manually is the School Verification flag. The CPS Verification flag is imported into QA Tool with the ISIR data.
Initial and Paid On Transactions

You must import initial and paid on ISIR transactions separately.

- To add Paid On data to the records in your database, select Update “paid on” records only and Prompt for Duplicates?.

- To add Initial data, select Update “initial” records only and Prompt for Duplicates?.

When you import Paid On data using the Prompt for Duplicates option, QA Tool alerts you that it has found duplicates and prompts you to Skip, Update, or Discontinue, even though you have not imported Paid On data before and have no Paid On data in your database.

This situation occurs because QA Tool creates not only an Initial transaction record for each student when you import Initial Data, but also a blank Paid On transaction record.

When you then import Paid On data, QA Tool matches the records in its database with the Paid On records you are importing and finds that Paid On records already exist.

Therefore, when QA Tool prompts you to Skip, Update, or Discontinue, choose Update or Update All to replace the blank Paid On records with your actual Paid On data.

Important Notes

You can construct special queries to use for importing records from your EDExpress database. See “Using Queries to Import Records from EDExpress” in this desk reference for more information.
Importing Data

To import data:

1. Click File, Import on the menu bar.

2. Click the down arrow on the Import Type box to display a list of file types to import.

3. Click the type of file you want to import: ISIR Data – SARA, etc.; 2002-2003 EDExpress Database; or User Defined Data.
   - If you are importing ISIR data in ASCII format, click the File button to specify the location of the file.
   - If you are importing ISIR data from EDExpress, click Selection Criteria to choose a query to help you narrow the number of records.

4. Click Printer, File, or Screen as the output destination for the import report. If you choose File, click the File button to locate and name the report file.

5. Click Update “paid on” records only or Update “initial” records only.

6. Mark the Prompt for Duplicates checkbox if you want QA Tool to alert you when it encounters a duplicate SSN during the import process.

7. Click OK to import the file and send the import report to the output destination you selected.

Important Notes

- Remember that if you print to a file, no hard copy prints on your printer.

- To print a hard copy, repeat the print process and select Printer as your output destination.
Multiple Entry

Multiple Entry is a function that allows you to enter data on multiple records at one time.

Using the Multiple Entry function in QA Tool, you can update two fields on a group of records: Initial School Verification Flag and a user-defined field that you created in User Database setup.

You must run the Data Validation process before using Multiple Entry.

To edit multiple records:

1. Select **Process, Multiple Entry** from the menu bar.

2. Mark the check box in the Select column for the field you want to update. Then click in the Value column for the field and enter the value. Repeat this step for each field you want to update.

3. (optional) Click on **SSN File** to choose an SSN file from your database. For information on creating an SSN file, see “Creating an SSN File” in this desk reference.

4. (optional) Click on **Selection Criteria** to select records by using a query.

5. Select **Printer, File, or Screen** as the output destination. If you want to send the report to a file:
   - Click the **File** button to locate the file, then click **OK**. QA Tool enters the filename and location in the text box automatically.
   - Remember that if you print to a file or the screen, no paper copy prints on your printer. To print a paper copy, repeat the print process and select **Printer** as your output destination.

6. Click **OK**. A second window appears that has all records that you selected and the fields to be updated displayed in a scrollable spreadsheet. The fields to be updated are displayed in the rightmost columns and can be modified on a record-by-record basis.

7. Click **Save** and then confirm **Yes** twice to perform updates and initiate the save process. QA Tool generates an edit report that identifies which updates were not made, which student records were affected, and why the update was not made.
Creating an SSN File

If you want to update a group of student records using Multiple Entry, an SSN file is a convenient way to select the records.

To create an SSN file:

1. Type the nine-digit SSNs using a DOS text editor (such as the Windows Notepad) or a word processing program.
   - Type one SSN per line. Do not use hyphens, spaces, or empty lines.
   - Do not press Enter after the last SSN, because doing so inserts a blank line and causes an error in EDExpress.

2. (optional) Type an end of file (EOF) marker.

3. Name and save the file as an ASCII file.
   - For example, in WordPerfect for Windows, select File, Save As, then choose ASCII Text (DOS) in the Format field. In Microsoft Word, select File, Save As, then choose MS-DOS Text in the Save File as Type field.
   - If you use a DOS text editor to create the file, just save the file. Windows Notepad and other DOS text editors save files only in ASCII format.

4. Enter EDExpress and select File, Print from the menu bar.

5. Select the module you want to use.

6. Click the down arrow in the Report text box to view the types of items that you can print.

7. Select the type of report you want to print.

8. Click the Multiple button to the right of the Report text box.
9. Click **Printer**, **File**, or **Screen** for the output destination. If you want to send the report to a file:

   - Click the **File** button to locate the file, then click **OK**. QA Tool enters the filename and location in the text box automatically.

   - Remember that if you print to a file or the screen, no paper copy prints on your printer. To print a paper copy, repeat the print process and select **Printer** as your output destination.

10. Select any of the various options that appear below the Enter SSN text box.

11. Click **OK** to send the report to the output destination you chose. If you chose Screen as your output destination, use the scroll bars to view and click **OK** when you are finished.
Validating Data

Data Validation is a process that alerts you of incomplete records (records with only one transaction, Initial or Paid On) in your database and prompts you to delete the records.

If you prefer, you can complete the records by importing the missing data instead of deleting them.

It also calculates and stores data on scheduled Pell awards, which is used in some reports.

Assumptions

When calculating, QA Tool makes these assumptions:

- The student’s enrollment status is full time.
- The Pell budget is more than $3,750.
- The student is Pell-eligible if the EFC is within a Pell range.

Running the Process

Click Process, Data Validation to start the Data Validation process.

Run the Data Validation process after you import data and before you analyze the data.

You must run the process before you can print these reports:

- Corrected Records in EFC Range
- Custom Report
- Field Change Report with Corrected Field Counts
- Field Range Report with Corrected Field Counts
- Pell Corrected Records Report
- List—EFC Change by Student
- List—Verification Flags by Student
• List—Verification Selection Criteria by Student
• Transaction Comparison
• User Database

**Important Note**

You can run the Data Validation process at any time when a student record is not open.
Analyzing Data

Transaction Comparison

The Transaction Comparison tab shows the student’s demographic data, as well as a side-by-side comparison of Initial and Paid On transactions.

You can choose to see all fields, or you can choose a specific group of fields using Selected Fields Codes that you define in Setup, Custom Formats, Selected Fields.

If you did not choose a Selected Fields Code when you opened the record, all fields are displayed.

This table explains the notations in the Change column:

<table>
<thead>
<tr>
<th>This symbol or notation</th>
<th>Indicates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue shading</td>
<td>A change between the Initial and Paid On values in that row</td>
</tr>
<tr>
<td>0 (zero)</td>
<td>No change between Initial and Paid On dollar values</td>
</tr>
<tr>
<td>- (minus symbol) next to difference in value</td>
<td>The dollar value for the field on Initial ISIR transaction is greater than the value for the field on the Paid On transaction</td>
</tr>
<tr>
<td>Y</td>
<td>A change between Initial and Paid On in this numeric or alpha-numeric field</td>
</tr>
<tr>
<td>N</td>
<td>No change between Initial and Paid On in this numeric or alpha-numeric field</td>
</tr>
</tbody>
</table>
Other Options

Reset School Verification Flags
If you set School Verification Flags on some or all student records, you can use this option to reset the flags for all records in the database.

Remove Verification Edit Profile Flags
If you flagged records with verification edit profiles, you can use this option to remove the flags from all records in the database.
Reports

The reports you can generate in QA Tool help you examine subsets of your sample and analyze your student population.

You can select a report to print to a printer, print to a file to save the report, or print to the screen to view it.

These reports are available:

- Corrected Records in Initial EFC Range. This report prints the corrected records in an initial EFC range for a selected sample.

- Custom Report. Custom reports are reports that you design for your needs, using fields that you select.

- Field Change Report with Corrected Field Counts. This report lists fields that affect the EFC and displays the number of corrections made to those fields with a corresponding percentage of the total number of corrections. It also shows the number of records for which the EFC increased, decreased, or remained unchanged as a result of a change to any of the selected fields, as well as the corresponding percentages for each changed field.

- Field Range Report with Corrected Field Counts. This report shows the number of corrections made to the selected field for a specific increment and the corresponding percentage of the number of corrections for that field. It also shows the number of times the EFC increased, decreased, or remained unchanged due to a change to the field, as well as the corresponding percentages for the field.

- Pell Corrected Records Report. This report shows counts and percentages for Pell eligible corrected records. It also shows the scheduled Pell award data that was calculated and stored during the data validation process.

- Query Management. The Query Management report is a list of both the queries you have created and the predefined queries provided with the QA Tool software.

- Record Layout—Export Full. This option prints a record layout for full data export.
• **Record Layout—Export UD.** This option prints a record layout for the User Database.

• **List—EFC Change by Student.** This report shows differences between the Initial value and the Paid On value of the field selected for a sample of students. It also shows the Initial and Paid On EFC values and the difference between them.

• **List—Verification Flags by Student.** This report shows the values for CPS verification flags (Initial and Paid On) and school verification flags (Initial and Paid On) for a selected list of students. These values show students who became Pell eligible and ineligible and students whose EFC changed and whose EFC remained unchanged.

• **List—Verification Selection Criteria by Student.** This report shows a list of students to whom verification edit profiles apply, along with the codes and descriptions of those profiles. More than one profile can apply to a student.

• **List—Verification Selection Criteria by Code.** This report shows a list of verification edit profiles and each student to whom the profiles apply. More than one profile can apply to a student.

• **System Setup.** You can print the System setup information including System and File Management information.

• **Transaction Comparison.** This report shows the demographic data and transaction comparison data for a student or a group of students.

• **User Database.** This report provides the field names and values entered in the user database for each student, listed by SSN.

**Important Notes**

• Step-by-step instructions for building queries can be found in the Bits & Bytes section of this desk reference.

• You can create queries to use with all reports except Record Layouts.
Printing a Report

To print a report:

1. Click **File, Print** on the menu bar.
2. Click the **down arrow** in the Report box to display a list of reports and choose the type of report you want to print.
3. Choose where you want to send the report: **Printer, File, or Screen**.
4. (optional) Click the **Selection Criteria** button to use a query.
5. Select additional options or enter additional data as necessary, such as the student’s SSN or a Selected Fields code.
6. Click **OK** to print.

Printing a Custom Report

To print a custom report:

1. Click **File, Print** on the menu bar.
2. Click the **down arrow** in the Report box to display a list of reports and choose **Custom Report**.
3. Choose where you want to send the report: **Printer, File, or Screen**.
4. Type the format code you want to use in the Custom Report Format field, or click the **ellipsis (…)** button to choose a code from a list.
5. Type an SSN in the Enter SSN box, or click the **ellipsis (…)** button to choose an SSN from the database.
6. (optional) Click the **Selection Criteria** button to use a query.
7. Click **OK** to print.

**Important Note**

When you want to print a report that contains data from specific fields (a custom report), you can use a query to compile the data. To use a query, click the Selection Criteria button in the Print dialog box.
Bits and Bytes

Queries

A query is a set of criteria that describes a particular student population. Queries are used in functions such as Print to select specific groups of student records from all the records in the database. Some queries have fixed values, or you can enter different values each time you use the query.

Queries can be used to limit the number of students selected when you are generating a report, or they can target information about a select group of students.

QA Tool comes with a set of commonly used predefined queries. Wherever the Selection Criteria option is available in QA Tool, you can use these queries to identify groups of records. You can also use predefined queries as templates to create your own queries.

When you open Query for the first time, you will see that the predefined queries are stored as the first set of records in the Query database. You will know that a query is predefined when you see “PREDEFINED QUERY” in the upper right corner of the Query box.

Important Notes

- Use the Query function to create queries that are most useful for you in the way that you collect and analyze data for QA Tool.

- You cannot delete predefined queries.
Rules for Queries

Some basic rules apply to constructing queries in QA Tool:

- Queries are processed from left to right, or beginning to end; however, AND is applied first, even if it appears after OR in the query statement.

- Parentheses change the order of precedence. Expressions enclosed in parentheses are processed before AND and OR.

  In the case of nested expressions, innermost parentheses are processed first. See the topic “Using Parentheses” in online Help for more information.

- Both segments of the query connected by AND must be true for a field value to be selected.

- Only one of the segments connected by OR must be true for a field value to be selected.
Sample Queries

Sample 1
This query finds all records with the CPS Verification Flag set to Yes.

\[(\text{SELECTED FOR VERIFICATION} = "Y")\]

Sample 2
This query is a parameter query. It prompts you to enter the dependency status, D (Dependent) or I (Independent), at the time you run the query. The query finds only the records with the dependency status you specify.

\[(\text{DEPENDENCY STATUS} = "[PARAMETER]"\)]

Sample 3
This query finds all records with Parent’s Adjusted Gross Income of less than $50,000 and prompts you to enter the value for Student’s Adjusted Gross Income at the time you run the query. The query finds only the records that meet both criteria.

\[(\text{PARENT’S ADJUSTED GROSS INCOME} < 50000) \text{ AND (STD’S ADJUSTED GROSS INCOME} < [\text{PARAMETER}])\]
Creating a Query

To create a query statement, select a field from the Field list (you can type the first letter of a field to see the field names that begin with that letter) and then select an operator and a value to narrow the range of values for the field you have selected.

- To see the valid values for the field you chose, click the Value Help button.
- To connect two or more statements, click the And or Or button and then create another statement using the Field, Operator, and Value fields. Your query appears in the Criteria box.

To create a query:

1. Select Tools, Query from the QA Tool menu bar.
2. If you are creating a query to import records from EDExpress, click the EDExpress tab.
3. Click the Add button.
4. Type a descriptive title for the query.
5. Select a field from the Field list. You can type the first few letters of the field name to find the field names that begin with those letters.
6. Click the down arrow in the Operator field to select an operator.
7. Type a value for the field. Click the Value Help button to see the valid values for the field.
   - If you want to be prompted for a value at the time you use the query, do not specify a value for the query statement.
   - Instead, click the Prompt at Execution checkbox.
8. Click the Append button to add the query statement to the Criteria box.
9. (optional) Click the And button or the Or button to add another statement to the query. Repeat steps 3-8 until you have added all statements for the query, then continue with step 10.
10. Click **Save** to save the query, then click **OK**.

11. Click **OK** to close the Query dialog box, or click **Add** to create another query.

**Important Notes**

- To create a query for Initial or Paid On data, select **Transaction** for the field, **LIKE** for the Operator, and **IN** (Initial) or **PD** (Paid On) for the value.

- To create a query to import records from EDExpress for Windows, select **Tools, Query** from the menu bar, then click the EDExpress tab.
Creating a Query from a Predefined Query

To create a query from a predefined query:

1. Select Tools, Query from the QA Tool menu bar.

2. Use the arrow buttons in the database buttons box to locate the predefined query you want to use for a template.

3. Type a new title for the query. You can modify and save a predefined query only if you rename it.

4. Modify the query. Click any line to select it and change the Field, Operator, or Value. Then click the Change button.
   - You can also delete lines or add new lines to the query.
   - To add new lines, select the line that should appear after the new line. Specify the Field, Operator, and Value for the new line, then click Append.
   - Use the other buttons located around the Criteria box to fine-tune the query statement if necessary.

5. Click Save to save the query, then click OK.

6. Click OK to close the Query dialog box, or click Add to create another query.
Using a Query

To use a query:

1. Click the Selection Criteria button.

2. Click the ellipsis (...) button next to the Query Title field to display a list of queries. The Query Grid dialog box displays.

3. Click on the query you want to use to select it.
   - If the Parameter Query column is not checked, click OK. QA Tool returns you to the Selection Criteria dialog box and enters the title of the query in the Query Title field. Skip to step 9.
   - If the Parameter Query column is checked, click OK. The Parameter Query Entry dialog box displays. Continue to step 4.

4. Click in the Field Value column next to each Field Name and type a valid value. Click the Value Help button to see a list of valid values.
   - If you leave a value blank, QA Tool automatically enters NULL as the value.
   - When you run the query, records that contain NULL for that field value are returned.
   - See “Null Values” for more information.

5. Click the View Query button to see the completed query. Review the query carefully to be sure you have entered the correct values for each field.

6. Click Close to return to the Parameter Query Entry dialog box.

7. Click OK to save your entries.

8. Click Close at the View query box to return to the Selection Criteria dialog box. QA Tool enters the title of the query in the Query Title field.

9. (optional) Finish choosing options in the Selection Criteria dialog box.

10. Click OK to run the query. A box displays the progress of the process.

11. Click OK to clear the In Process box.
**Null Values**

When you click **OK** in the Parameter Query Entry dialog box, QA Tool automatically enters NULL for any values you have left blank and displays a warning.

- When you click **OK** to clear the warning, the Parameter Query Entry dialog box displays again so you can enter a value.
- If you leave the value blank, QA Tool enters NULL as the value.

When you run the query, records containing NULL for that field value are returned.
Using Queries to Import Records from EDExpress

Your EDExpress database may be very large, so you can construct special queries to use for importing records from EDExpress into QA Tool.

These queries help you limit the number of records quickly and easily.

The fields for the queries are derived from the demographic record in EDExpress and are available only for this import, not for other QA Tool functions:

- ADD DATE
- ADD TIME
- ADD USERID
- CURRENT SSN
- FIRST NAME
- LAST NAME
- ORIGINAL SSN
- UPDATE DATE
- UPDATE TIME
- UPDATE USERID

To create one of these special import queries, click the EDExpress tab in the Query dialog box and follow the same steps as you would for creating other queries. Then, to import the records, follow the steps for importing.
Modifying a Query

To modify a query:

1. Select Tools, Query from the QA Tool menu bar.

2. Use the arrow buttons in the database buttons box to locate the query you want to modify.

3. Modify the query. Click any line to select it and change the Field, Operator, or Value. Then click the Change button.

   • You can also delete lines or add new lines to the query.

   • To add new lines, select the line that should appear after the new line. Specify the Field, Operator, and Value for the new line, then click Append.

   • Use the other buttons located around the Criteria box to fine-tune the query statement if necessary.

4. To delete a line, select the line and click Remove.

5. Click Save to save the query, then click OK.

6. Click OK to close the Query dialog box or click Add to create another query.
Deleting a Query

To delete a query:

1. Select Tools, Query from the QA Tool menu bar.

2. Use the arrow buttons in the database buttons box to locate the query you want to delete. You cannot delete predefined queries.

3. Click the Delete button in the database buttons box. QA Tool asks you to confirm that you want to delete the query.

4. Click Yes to delete the query.

5. Click OK to continue.
Getting Help

Online Help
Instead of a paper user’s guide, QA Tool has online Help. General help is available from the menu bar, and field help is available by pressing the F1 key. See the topic “Using Help” in the online Help for more information.

CPS/WAN Technical Support
For questions regarding technical assistance and software functionality, call CPS/WAN Technical Support at:

800/330-5947
TDD/TTY: 800/511-5806

or e-mail CPS/WAN Technical Support at:

cpswan@ncs.com

Sources of Assistance for Schools
See Sources of Assistance for Schools for contact information for Performance and Accountability Improvement support staff, the QAP listserv, and the QAP Web site. This document contains helpful contact information for all Student Financial Assistance programs, including frequently called help lines, e-mail addresses, phone numbers, and Web site addresses. You can download the software and the related user documentation from the U.S. Department of Education’s Student Financial Assistance Download (SFAdownload) Web site located at SFAdownload.ed.gov.
Downloading Software and Documentation

You can download the software and the related user documentation from the SFAdownload Web site located at SFAdownload.ed.gov. This Web site was created to give you access to financial aid tools (for example, software and paper documents) for easier and more efficient use of QA Tool.

Paper documentation is available to download from the Internet in both Adobe PDF and Microsoft Word format. The following types of paper documentation are available to download:

- Installation Guides
- Cover Letters
- Technical References
- Desk References

The amount of time it takes to download a file depends on the file size and the speed of the Internet connection. If you do not have a direct connection to the Internet, a 56 KB modem is recommended.