


Wisconsin Birth to 3 Program Advanced Query Builder (AQB) Guide



WISCONSIN DEPARTMENT
of **HEALTH SERVICES**

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1 Introduction

1.1 Introduction

SAS Institutes is the vendor for the Wisconsin Department of Health Services (DHS) Enterprise Data Warehouse/Data Analytics and Reporting (EDW/DAR) Solution, commonly referred to as SAS. SAS provides county Birth to 3 Programs access to local program data on an ongoing basis and includes only those fields included in the statewide database (Program Participation System [PPS]). Birth to 3 Program data is transferred from the statewide database to SAS every Sunday evening.

An Advanced Query Builder (AQB) was developed to allow SAS users to create their own custom queries which export reports needed by county Birth to 3 Program staff to support ongoing operations.

2 Logging On

2.1 Where to access SAS

Web address: <https://prod.widhs.cloudanalytics.sas.com/SASDrive/>

1. Click “Use your corporate credentials.”
2. Enter your work email address and click “Next.”
3. Enter your username and password and click “Sign in.”

Note: The username and passwords are the same used to log into the ForwardHealth Portal.

Note: When SAS opens it will be on the “SAS Studio” page.

2.2 Troubleshooting

SAS Wisconsin DHS helpdesk: widhs-helpdesk@sas.com

The SAS helpdesk can help with:

- Login issues
- Verifying which URL (website link) to use
- Password resets
- Error messages
- Finding reports
- Errors that occur when running a query (see “Running the query” section)

Bureau of Children’s Services (BCS) Technical Assistance Center (TAC) Inbox:

DHSBCSTAC@dhs.wisconsin.gov

The staff who answer questions sent to the BCS TAC inbox can help with :

- Developing queries
- Saving queries
- Saving reports from queries
- Errors received when run a query (see “Running the query” section)
- Running pre-built reports
- Understanding reports
- Creating new reports

SAS Training Sessions: EDWDARtraining@SAS.com

The staff who answer questions sent to the SAS Training inbox help with questions about:

- Advanced Query Builder in general
- Advanced query filter
- Code use in queries

2.3 Definitions of terms used in this guide

AQB—Advanced Query Builder; tool used in SAS to develop queries by choosing variables to include and identifying the filter(s) to apply

CD – Code

Code—Combination of words and formulas used by developers of applications to develop a query, used to indicate the connection between variables and actions to be taken to make a report for the end user

Custom task—see query

Data tab—Tab where variables are chosen for the query

DESC—Description

Dynamic list—Chart in PPS that includes several entries all related to a certain individualized family service plan (IFSP) process (e.g., screenings, evaluations, services)

Filters tab—Tab where filters are applied to the query

IND—Indicator

Label—Everyday term for the name of the variable, as it exists in the underlying database

Name—Abbreviated title for a variable, comes from the underlying code received from the database.

No new services—Refers to the Services dynamic list on the Service Planning page of PPS when IFSP updates are added to PPS without a new service being added to the IFSP; for service type the PPS user chooses “no new services”

Output tab—Tab to choose the name and location to save the report derived from running the query

Pane—Section of the screen that is separated from other sections, like a window with separate panes, may also think of them as columns or navigation bars on the screen.

Query—Way to pull data from a database to answer a question, developed using the AQB, a.k.a. custom task is indicated by .ctk

Radio button—an circle icon representing one of a set of options, only one of which can be selected at any time.

Report—Excel document that includes all the data from the query

Search word—One or more words entered into a Search field

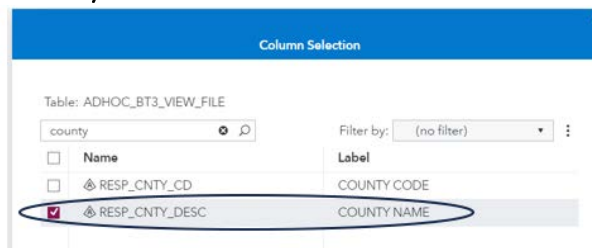
Variables—A field in PPS that is entered by a PPS user, listed in the AQB as Name and Label

Note: This guide uses the “label” of the variables, not the “name.”

2.4 Tips for choosing variables

- In most cases the label of the variable is based on what it is called in PPS.
- When a variable provides a choice of ending in “CD” or “DESC,” it is generally recommended to choose the variable ending in “DESC” as the report will include the name of the variable.

Example: County

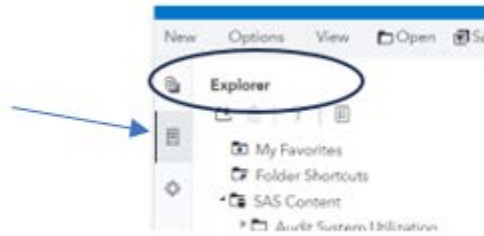


- From the Child & Referral Info section, include the following variables: MCI, county description, agency, first name, last name, and birthdate. (County description is recommended to assure the correct data is being shared with each county program.)
- In the report derived from the query, the variables will show up in order from Child & Referral Info variables chosen, then Screening/Evaluation variables chosen, etc. That order cannot be changed prior to running and downloading the report. The order of variables—which are columns in the report—can also be changed once the report is downloaded to Excel.
- When pulling in certain variables, make sure to check the Filters tab to be sure the report will include all the data wanted. (See “Select Most Recent Evaluation per File” and “Select Services per File” filters.)
- When pulling in variables from a PPS dynamic list (e.g., evaluations, services) note that the report may include multiple rows with some of the same data. This is due to the AQB putting or connecting each variable with the other variable. For example, if the child had two evaluations and two services, there will be four rows for the child in the report; each service would be connected to each of the evaluations (or vice versa).
- When pulling in variables that are not connected to another variable (e.g., primary location), the data will be exactly the same in all rows.

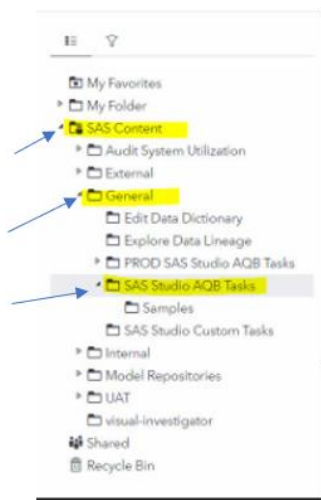
2.5 Where to access the AQB

1. Go to “Develop SAS Code.”

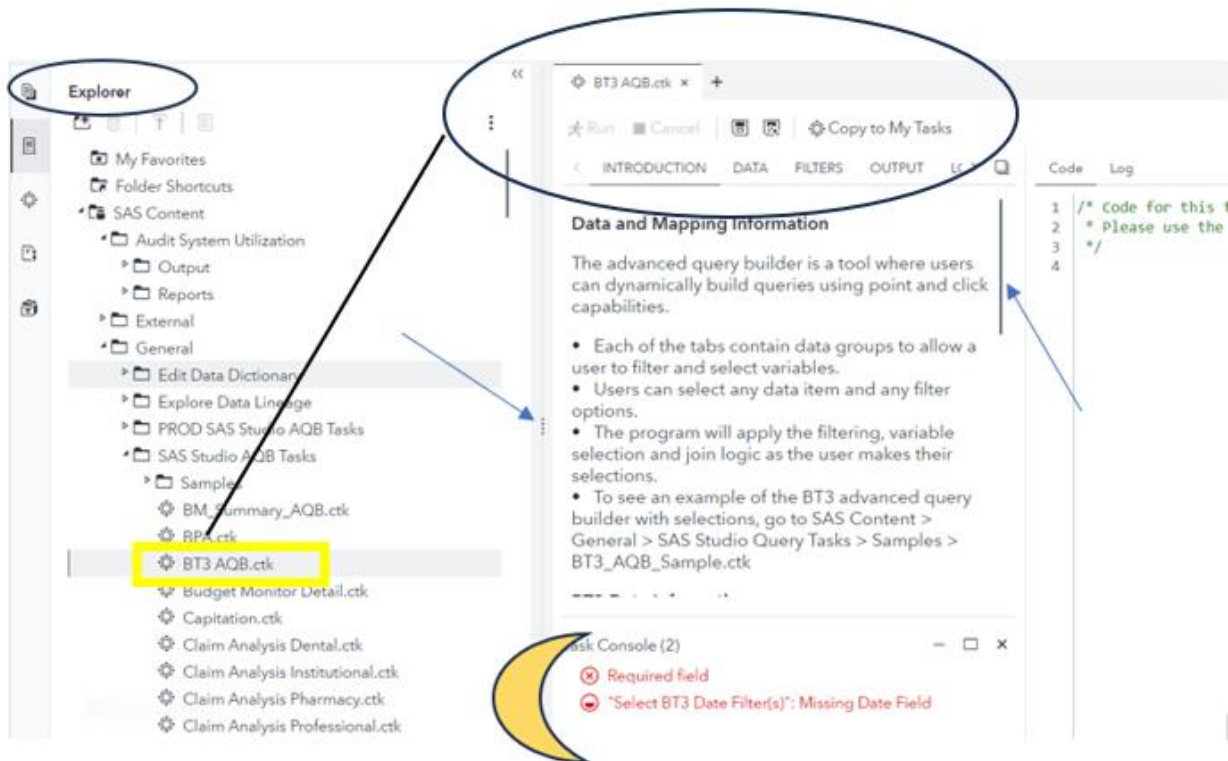
- Click on the three white lines in the upper left corner in the blue bar.
 - Choose “Develop SAS Code.”
2. Make sure the second little icon in the far-left column (“Explorer”) is highlighted.



3. Open “SAS Content,” “General,” and “SAS Studio AQB Tasks” by clicking the arrow in front of each.



4. Find the AQB template for the program: "BT3 AQB."
5. Double click on it. It will open on the right side of the screen.



Suggestion:

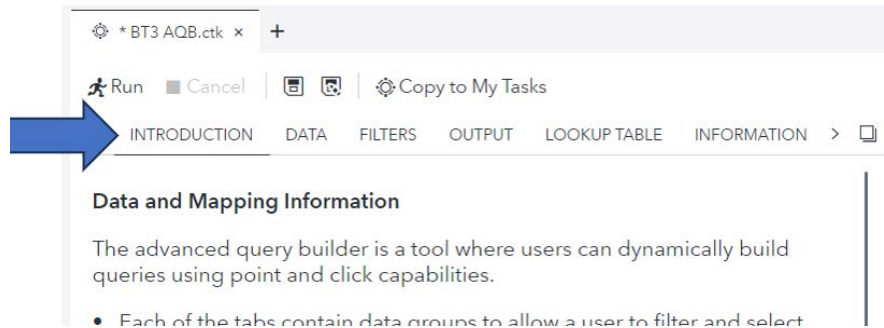
- Click and hold the four dots in the vertical gray bar between the Explorer column and the AQB pane and move it left.
- Then click and hold the vertical line to the left of the vertically positioned numbers 1-4 and move it right. This will allow use of the AQB tabs efficiently. (See arrows and moon-shaped graphic in screenshot above.)

Note: At the bottom of the tab section, there may be red statements. They relate only to a required filter being needed.

3 Building a query in the AQB

3.1 Building a query

There are six tabs in the pane on the right side of the screen. Not all the tabs will be used.

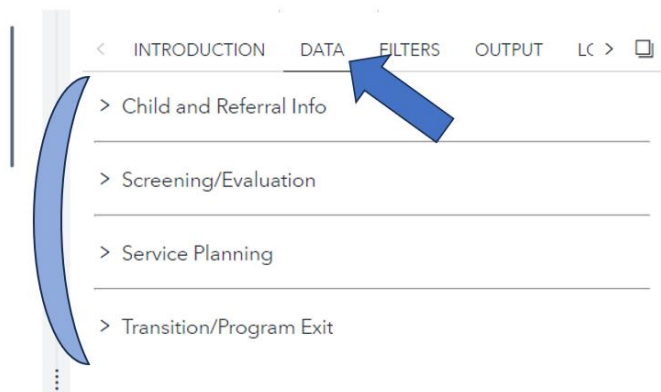


3.1.1 Adding variables

3.1.1.1 Adding

1. Go to the Data tab.

There are four sections in the Data tab matching the organization of the Program Participation System (PPS). Variables have been placed into these sections based upon the page of PPS they can be found.

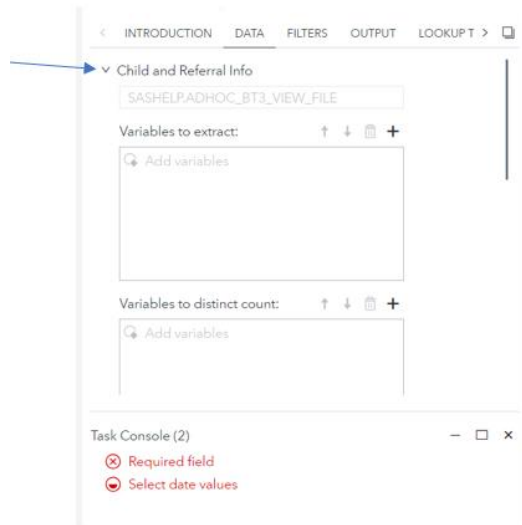


2. Click the arrow in front of the words “Child and Referral Info” to open that section.

There will be four boxes, each starting with “Variables to...”

Note: Each section on the Data tab has the same four boxes.

The “Variables to extract” box is where variables are chosen to be in the report; the variables become the columns in the report.



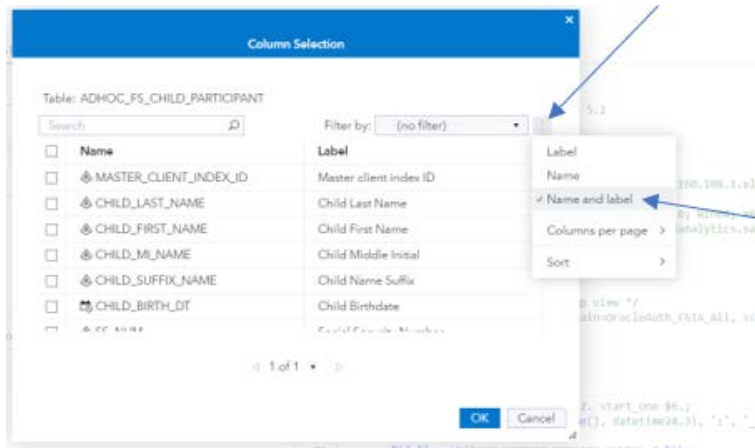
3. Click the plus sign (+) in the upper right corner of the “Variables to extract” box to choose variables.



A new box will open.

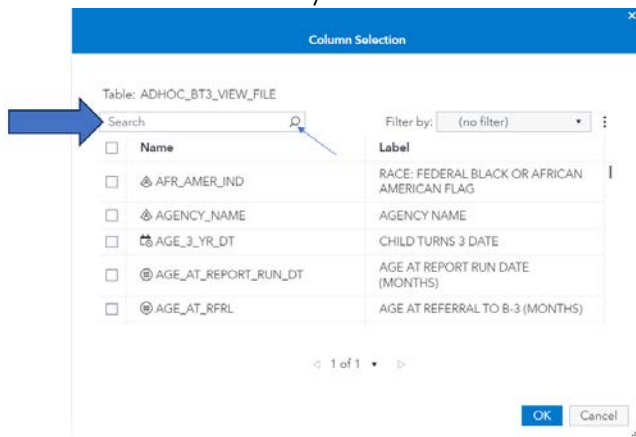
- Click on the three vertical dots to the right of the “filter by” field and choose “Name and Label.”

This will allow searching for variables using words found in the label of the variable (right hand column).



Use the Search field to find variables.

- Enter a key word into the Search field and either click the magnifying glass icon in the Search field or hit Enter on the keyboard.

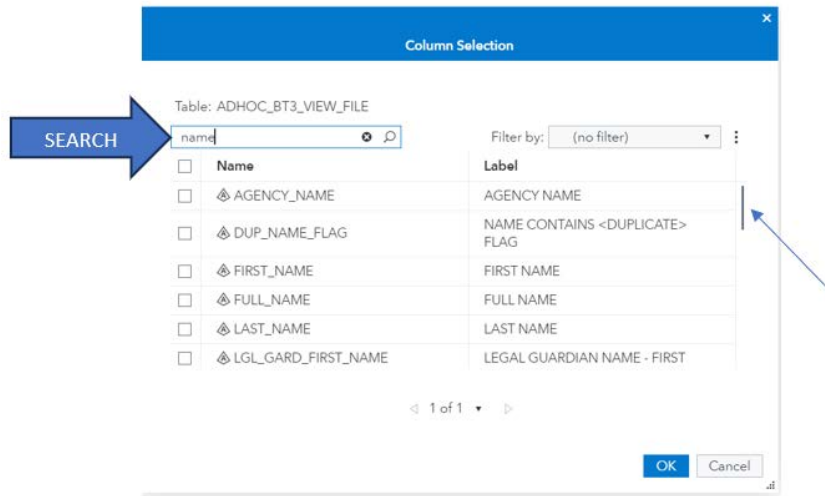


Note: The variables listed will change, finding only those that match the word entered in the Search bar.

It finds variables that have the search word in either the name or label columns.

Recommendation: From the Child and Referral Info section, include the following variables: MCI, county description, agency, first name, last name, (or full name—last, first, your preference) and birthdate.

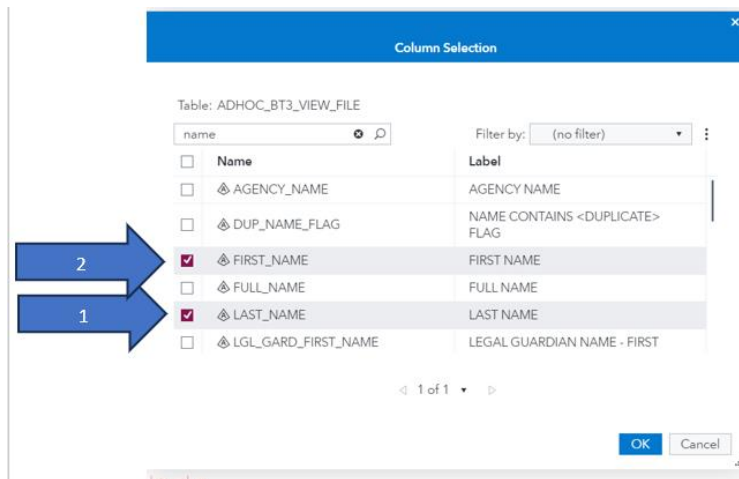
In the example below, the search word “name” was entered into the Search field (see arrow in screenshot below); all variables with the word “name” in them (either in the Name or Label columns) appear. Use the scroll bar on the right side of the box to see more choices.



- To choose a variable to include in the query, click the box in front of the variable (see red boxes in screenshot).
- Use the Search field to find the next variable needed from the Child and Referral Info section.

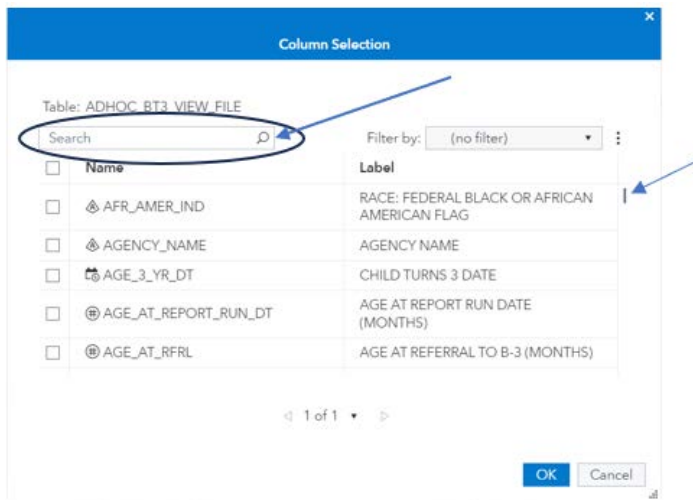
Tip: Choose the variables in the order for them to appear in the report. The variables will show up as columns in the report in the order chosen.

Example: If the last name of the child should be listed first in the report, choose “last name” first. Then “first name.”



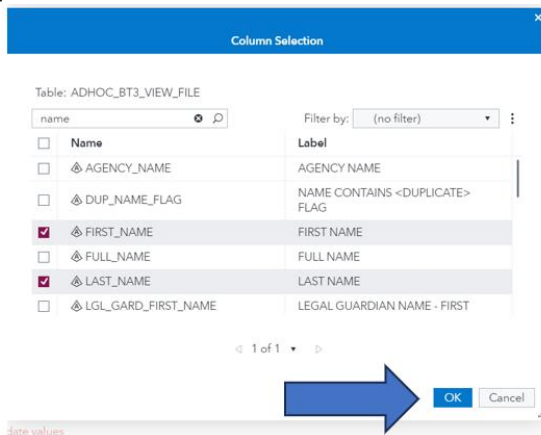
Note: When a variable has already been selected (in the “Variables to extract” box), if it is searched for, it will not show up as an option.

Tip: If you could not find a variable using Search field and want to see all variables to choose from, remove all letters from the Search field and click the magnifying glass icon. Use the scroll bar on the right scroll through all the variables to find the one you need.



8. When all variables have been chosen, click the blue OK button in the bottom right corner.

Note: Multiple variables can be searched for before clicking the blue OK button.



Note: Clicking the blue OK button will put all the variables chosen into the “Variables to extract” box. Use the scroll bar, as needed, to see them all.



If one or more variables needed has been missed, relick the plus sign (+) in the upper right corner of the “Variables to extract” box and choose another variable(s).

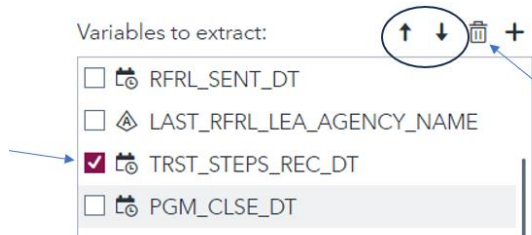
3.1.1.2 Changing order of variables

Changing the order of variables in the “Variables to extract” box.

Note: These directions work for all sections on the Data tab.

If the variables are not in the order wanted, the order can still be changed.

1. Click the box in front of the variable to be moved.



2. Then use the arrows in the upper right corner to move the variable (or the trashcan icon to delete it).
3. Uncheck the box in front of the variable once it is moved to the correct place to be displayed in the report.

Reminder: Remove the check box in front of the variable moved before moving other variables.

3.1.1.3 Sorting

Sorting data in the report using the query

The AQB allows for adding how to sort within a variable by choosing the variable(s) to sort by.

1. Go to the “Variables to sort by” box
2. Click on the plus sign (+) in the upper right corner.



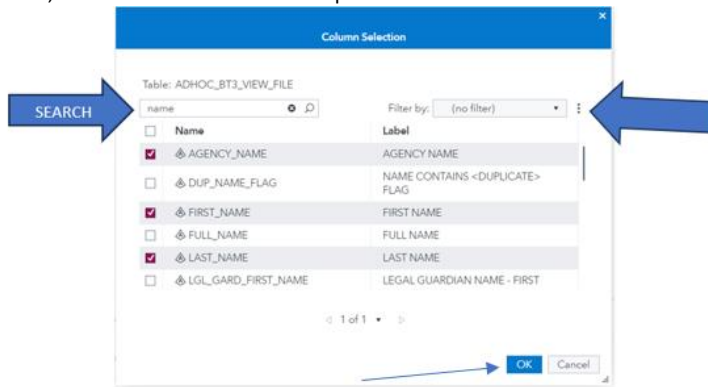
Another box opens.

3. Click on the three vertical dots to the right of the “filter by” field and choose Name and Label.
4. Use the Search field to find the first variable to sort by (e.g., agency or last name).

Note: To sort by a variable, it must be in the “Variables to extract” box.

5. Follow the same steps above to find/choose more than one variable. The order the variables are chosen will be how the report is sorted.

For example, common state level reports chose the variables in this order--county, agency, last name, first name-- so the report is sorted in that order.

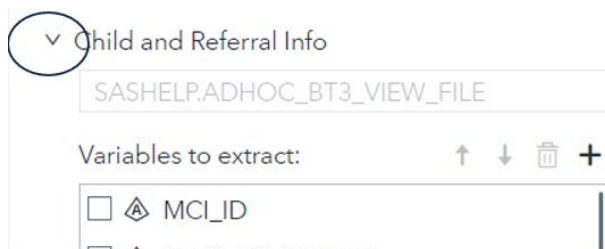


6. Once all variables to sort by have been chosen, click the blue OK button in the bottom right corner (see screenshot above).
7. If a variable has been missed to sort by, relick the plus sign (+) in the upper right corner and add more variables.

Note: Follow the directions given previously for changing the order of the variables to sort by once they are in the “Variables to sort by” box.

8. Go back to the title of the Child and Referral Info section and click the arrow in front of it to close the section.

From:



To:



9. Go to another section on the Data tab to add additional variable(s) for the report. Repeat the process above for choosing variables and organizing them in the next section.

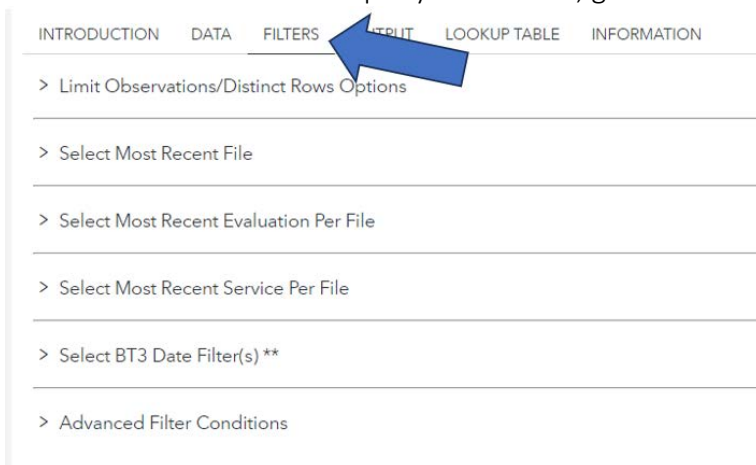
Note: Sorting in the other sections is likely not necessary.

Reminder: Each section of the AQB in the Data tab is organized by the PPS pages.

Note: In the report derived from the query, the variables will show up in order from Child and Referral Info variables chosen, then Screening/Evaluation variables chosen, etc. That order cannot be changed prior to running and downloading the report. The order of variables--which are columns in the report-- can also be changed once the report is downloaded to excel.

3.1.2 Choosing filter(s)

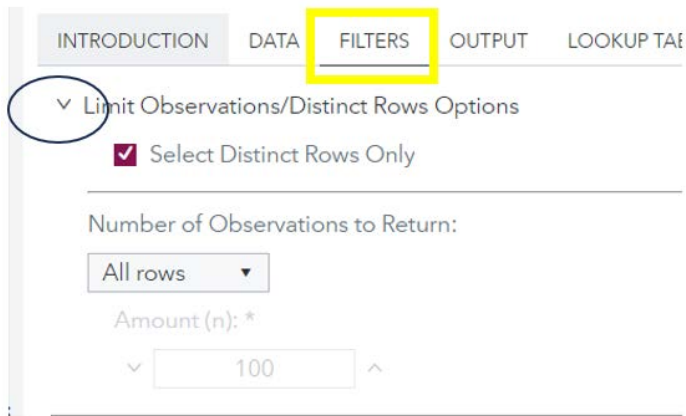
Once all variables to include in the query are chosen, go to the Filters tab.



3.1.3.2 Limit Observations/Distinct Rows Options section

Recommendation: In most instances it is recommended to leave the box checked for Select Distinct Rows Only. The default is checked.

1. Click the arrow in front of “Limit Observations/Distinct Rows Options” to open that section.



The screenshot shows a software interface with a 'FILTERS' tab highlighted in yellow. Below the tab, the 'Limit Observations/Distinct Rows Options' section is expanded, indicated by a downward arrow and a circled arrow pointing to the section title. This section contains a checked checkbox labeled 'Select Distinct Rows Only'. Below this is a section titled 'Number of Observations to Return:' which includes a dropdown menu currently set to 'All rows' and a numeric input field labeled 'Amount (n): *' with the value '100' entered.

The “Limit Observations/Distinct Rows Options” section determines how to limit the number of rows seen in the report for an individual child based upon the data in the query.

When checked, the box for “Select Distinct Rows Only” has the system look at every variable in each row and then finds only those rows that are distinct (have different data from other rows for the child).

Example (a simplistic example): If the initial contact date and evaluation dates are pulled into the report **and** PPS has the same evaluation date for both evaluations that occurred, only one row for the child will be in the report. However, if the evaluation dates are different for the two evaluations, two rows for the same child will be in the report.

So, if the data differs in one or more variables, more than one row of data will be displayed for the child.

2. Determine how many rows to include in the report.

If the report should include all rows uncheck the box in front of the words “Select Distinct Rows Only.” Otherwise, leave as is.

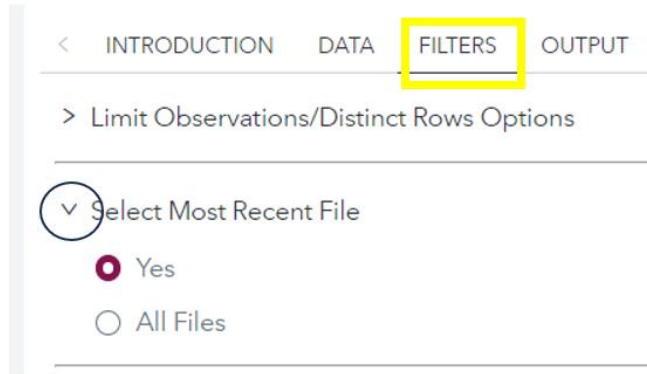
Note: The “Select Distinct Rows Only” box is defaulted to be checked.

3. Ignore the Number of Observations to Return field.
4. Close that section by clicking the arrow in front of the words “Limit Observations/...”

3.1.2.2 Select Most Recent File section

Recommendation: In most instances it is recommended to leave the “Yes” for “Select Most Recent File.”

1. Click the arrow in front of “Select Most Recent File” to open that section.



2. Determine how many of the child’s files data should be pulled from. Consider if the data should come from only the most recent file’s data (the last time this child was served) or from each file the child has in PPS.

Note: The files used are also subject to the filter used in the “Select BT3 Date Filter(s)**.”

3. To see data from all files, choose the radio button in front of “All Files.”

Otherwise leave “Yes” clicked. This means the query will only pull the most recent file’s data.

Note: “Yes” is the default.

4. Close that section by clicking the arrow in front of the words “Select Most Recent File.”

3.1.2.3 Select Most Recent Evaluation section



If any data regarding evaluations is included in the query:

1. Click the arrow in front of “Select Most Recent Evaluation Per File” to open that section.
2. Determine the need to see data only related to the most recent evaluation or if data is needed from all the evaluations listed in PPS.

To see data for all the evaluations listed in PPS, click the radio button in front of the words “All Evaluations.”

Note: “Most recent evaluation” is defined as the evaluation with the most recent actual evaluation date on the Screening/Evaluation page of PPS. If multiple evaluations have the same actual evaluation date, then the highest sequence number for the evaluations entered will be used to identify the “most recent evaluation” (usually the first one listed in the dynamic list in the Evaluations section of the Screening/Evaluations page of PPS).

3. Close that section by clicking the arrow in front of the words “Select Most Recent Evaluation per File.”

3.1.2.4 Select Services per File section



If any data regarding services is included in the query

1. Click the arrow in front of “Select Services Per File” to open that section.

Note: “All Services including ‘no new services’” is the default.

Note: “Most recent service” is defined as the service with the most recent IFSP date in the Services section of the Service Planning page of PPS. If multiple services have the same IFSP date, then the highest sequence number for the services entered will be used to identify the most recent service (usually the last one listed in the dynamic list in the Services section of the Service Planning page of PPS).

2. Click the radio button in front of the option that matches the data to include regarding the Services section of the Service Planning page of PPS. There are four choices.

The four choices for service filter are:

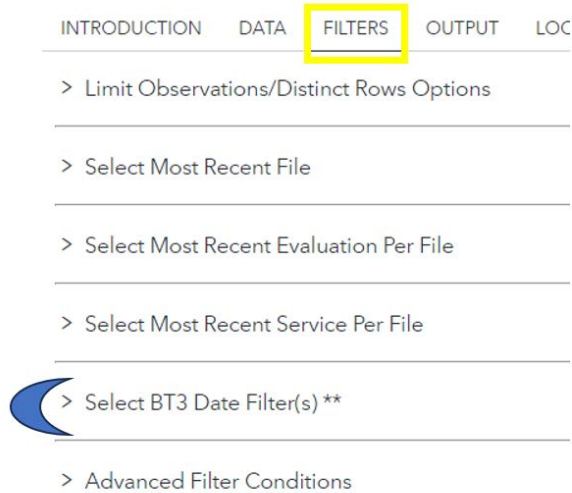
1. All Services including ‘no new services’—this choice will include all services listed on the Service Planning page of PPS, including all “no new services” entries in the dynamic list.
2. All Services excluding ‘no new services’—this choice will include all services listed

on the Service Planning page of PPS; it does not include the entries of “no new services.”

3. Most recent service including ‘no new services’—this choice will include only the most recent service and all “no new services” entries in the dynamic list.
 4. Most recent service excluding ‘no new services’—this choice includes only the most recent service; it does not include entries of “no new services.”
3. Once the filter choice has been made, close that section by clicking the arrow in front of the words “Select Services per File.”

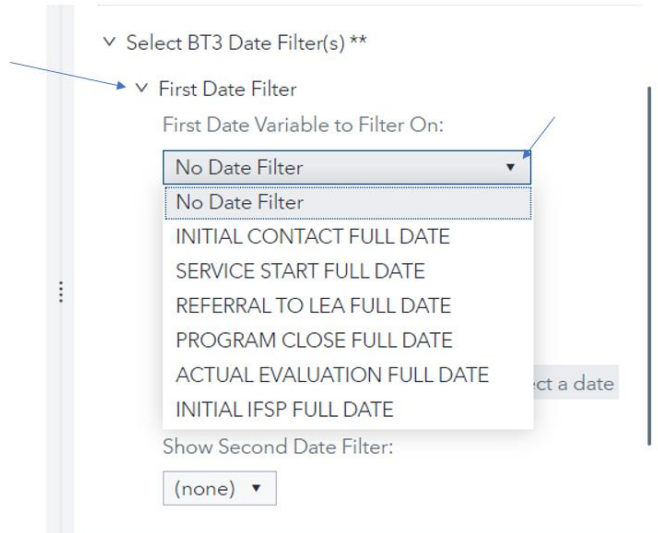
3.1.2.5 Select BT3 Date Filter(s)**

This filter is required to be used; this section must be completed.



Each query must have at least one date filter selected from the section “Select BT3 Date Filters(s)**.”

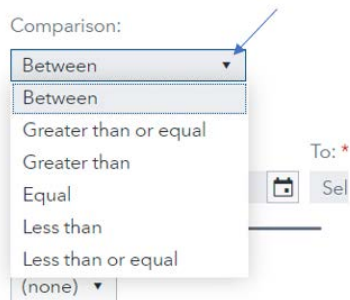
1. Click the arrow in front of the words “Select BT3...” to open the section.
2. Click the arrow in front of the words “First Date Filter” to open that section.
3. Choose the date variable by clicking the arrow in the “First Date Variable to Filter On” field to see choices.
4. Choose the date variable to filter by.



Note: The date variable does not need to be in the list of variables listed on the Data tab.

Note: Consider which date variable will produce the data required.

5. Next choose the range of the dates used. Click on the arrow in the “Comparison” field to see the choices.



Choose the date range to be used to populate the report.

The “Select the date range” section will change based upon the “Comparison” field choice.

- Click on the calendar icon for the first field (From) in the range.

INTRODUCTION DATA FILTERS OUTPUT LOOKUP TABLE INFORMATION

> Select Most Recent Service Per File



▼ Select BT3 Date Filter(s) **

▼ First Date Filter

First Date Variable to Filter On:

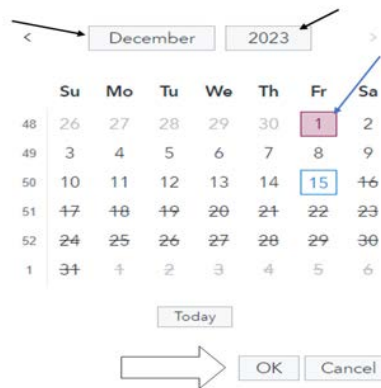
Comparison:

Select the date range.

From: *  To: * 

Show Second Date Filter:

- Change the year by clicking the year box (top right) and choosing the year wanted.
- Change the month by clicking the month box (top left) and choosing the month wanted.
- Choose the day of the month to use (see blue arrow).
- Click OK.

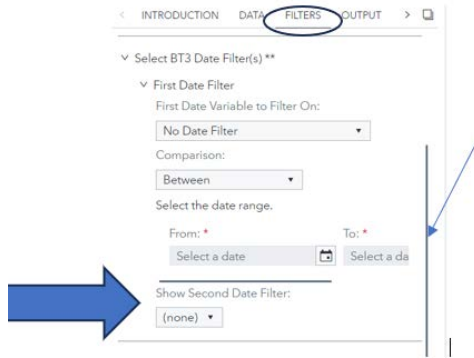


- Repeat steps above for the second date in the range, if applicable

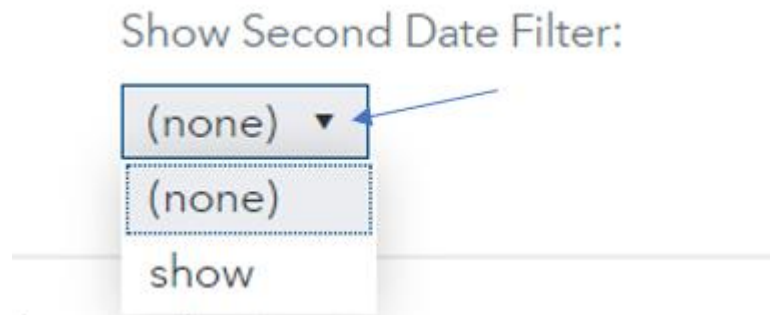
Note: To enter the second date in the range (To), use of the scroll bar on the bottom may be needed.



6. Choose a second date variable to filter by, if appropriate.
 - The scroll bar on the right side may need to be used to get to the Second filter section.



- Click the arrow in the “Show Second Date Filter” field to see choices.
- Change the choice from “(none)” to “show.”



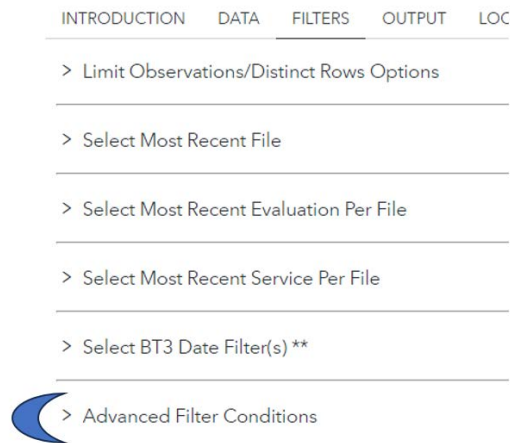
- Repeat the steps above to add date variable and date range for the “Show Second Date Filter” section.

Note: Up to four date variable filters can be included.

Note: Date filters do not have to be in “Variables to extract” box.

7. Once the filter choice(s) have been made, close that section by clicking the arrow in front of the words “Select BT3 Date Filter(s)**.”

3.1.2.6 Advanced Filter Conditions section



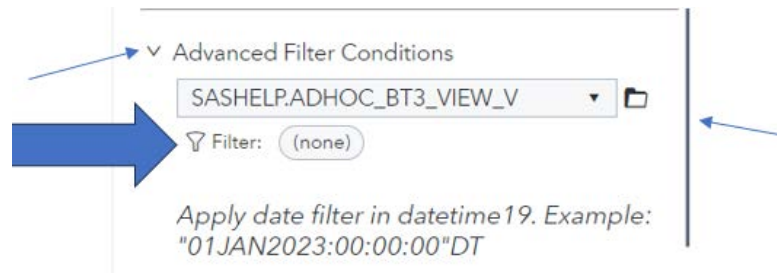
Note: To add a filter using the Advanced Filter Conditions section requires some code knowledge.

For assistance, please contact SAS for a training hour. To request a one-on-one session, email EDWDARtraining@SAS.com. Supply the topic to discuss during the session plus dates and times to meet. **Note:** You need to include that the times are CST.

Here is one easy use of the “Advanced Filter Conditions”—when the query is to pull fields that are either “there” meaning “not missing” or “not there” meaning “missing.”

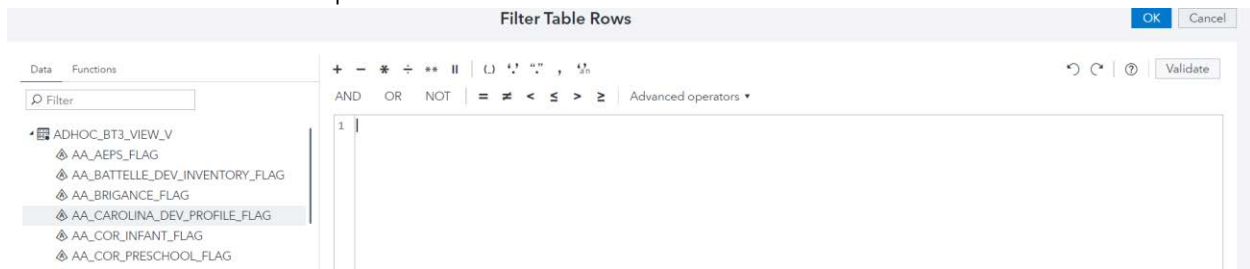
An example. The query being developed needs to pull all **initial contact dates** for the 2023 calendar year and pull files that **have program close dates** and **do not have initial IFSP dates**.

1. Under Select BT3 Date Filter(s)** , the initial contact date would be chosen along with the corresponding dates to pull the 2023 calendar year.
2. Under Advanced Filter Conditions, the program close date and initial IFSP date filters will be added.



- Click on the arrow in front of “Advanced Filter Conditions.”
Note: you may need to use the scroll bar on the right to get to this filter.
- Click on the word “Filter.”

Another box opens.

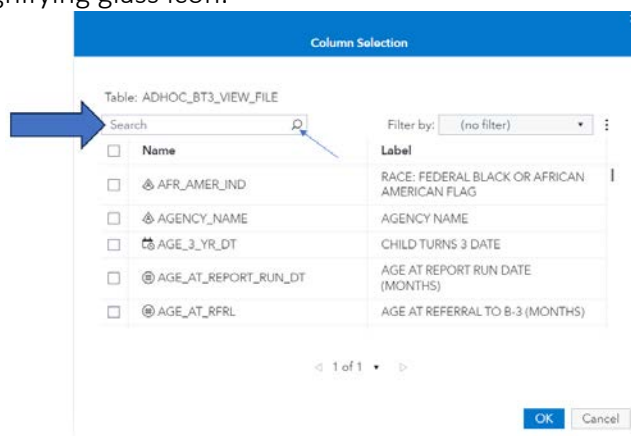


- Use the scroll bar to go to the bottom of the column on the left and click “More.”

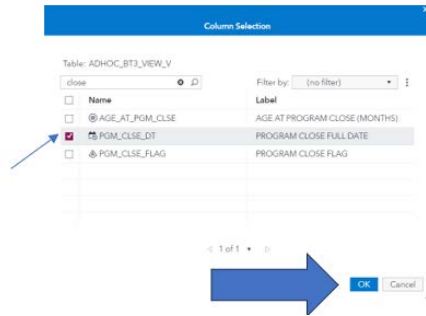


Another box opens.

- Enter a word to search for the first variable to filter on and click the magnifying glass icon.

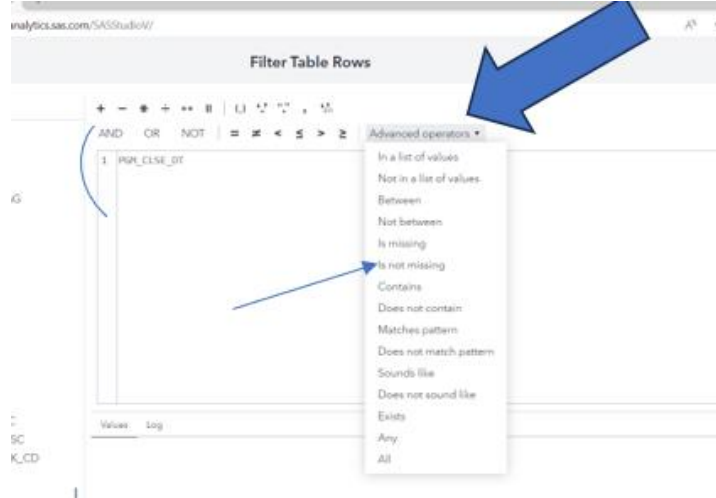


- Choose the variable by clicking the box in front of it and click the blue “OK” button (in this example, “Program close full date”).

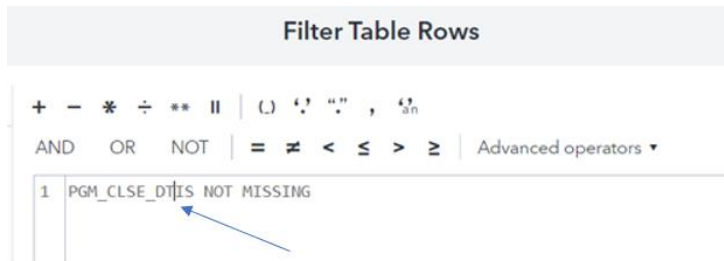


The variable will now be in the box on the right side of the screen.

- Click on “Advanced Operators” and choose “Is not missing.” (In the example, the query will be pulling files with a program close date.)



Note: A space may need to be entered between the “T” in DT and the phrase “is not missing.”



- Add the word “AND” to the end of the first row and hit “Enter.”
- Repeat the steps above to choose another variable (in the example, “initial IFSP full date”).
- Click on “Advanced Operators” and choose “Is missing” (In the example, the query will be pulling files without an initial IFSP date)
- Add a space as appropriate.
- Click on the “Validate” button on the far right.

Note: If there is no red in the log tab at the bottom of the page, click the blue OK button on the far upper right.



The filters have now been added to the query.



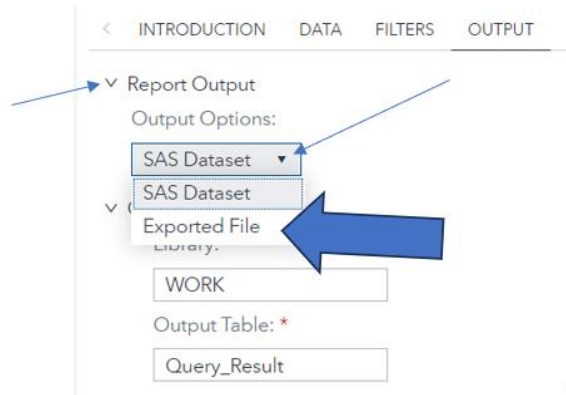
3.1.3 Output Information

Go to the Output tab.



3.1.3.1 Report Output

1. Open “Report Output” by clicking the arrow in front of it.
2. Change the “Output Options” field.
 - Click on the arrow in the “Output Options” field.
 - Choose “Exported File.”

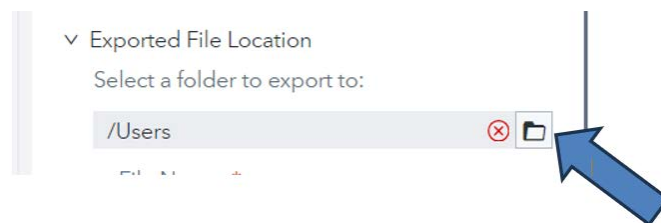


3.1.3.2 Exported File Location

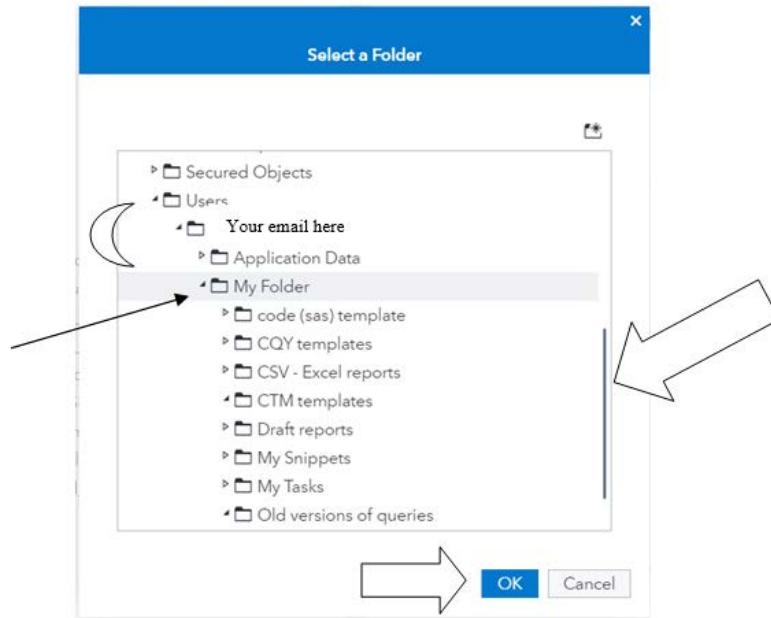
The “Exported File Location” will open when “Exported File” is chosen in the “Output Options” field.

1. Click on the folder icon to choose where to save the report.

Note: Typically what is entered will be /Users/(your email)/My Folder.

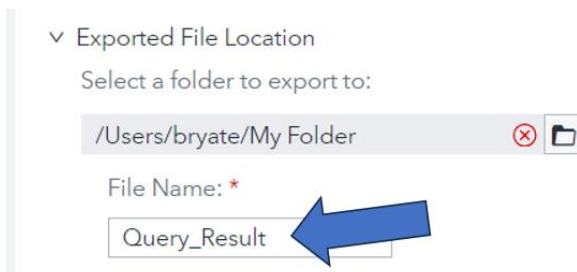


- a. A new box will open to choose the folder to save the report in.
- b. Choose where to save the report:
 - i. Scroll down using the scroll bar on the right side.
 - ii. Find the SAS user's email address under "Users."
 - iii. Highlight My Folder.
 - iv. Click the blue OK button.



2. In the "File Name" box, highlight the words "Query_Result" and type a new title for the report.
This will be the name of the report to look for in "My Folder" once the report is run.

From:



To: (example)

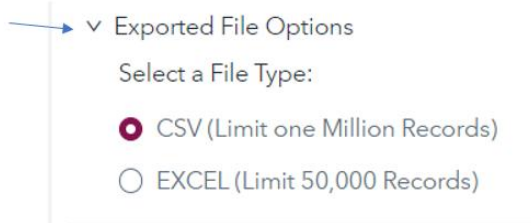


3.1.3.3 Exported File Options

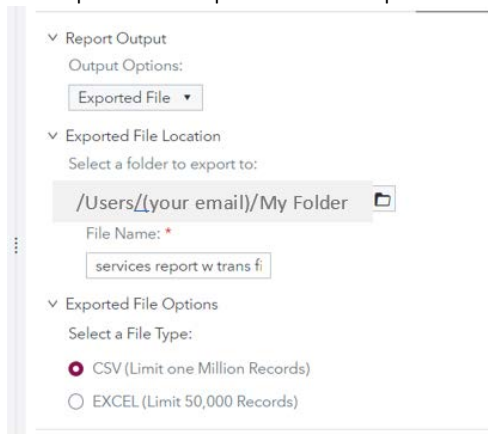
Note: It is recommended to leave the Exported File Options as “CSV.”

Note: Choosing Excel will not work for all reports due to the amount of data included in the report. An error is triggered by the output table containing more than 50,000 rows. The 50,000-row limit is an Excel limit that SAS is not able to adjust. If choose this option, then when saving the report, you do not have to change the type of report (see 3.3.3 Saving, 2.).

1. To change the exported file option, go to the Exported File Options section. It should be open; if not, click on the arrow in front of the words “Exported File Options.”
2. Change the option to Excel by clicking on the radio button in front of the word “EXCEL.”

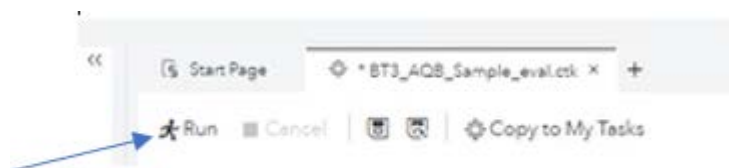


Sample Completed Output tab example:



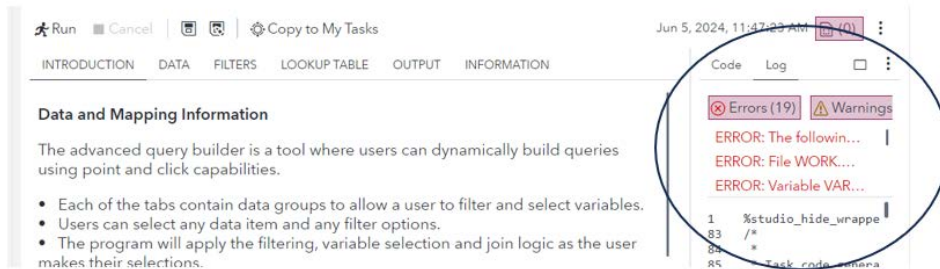
3.2 Running the query

1. Click “Run” in upper left corner of the query.



On the far-right pane (where the Code and Log tabs are) things will move around. If red shows up and the “Errors” box has a number in it, the report did not run. Users can review the Log tab in the far-right pane to view the error.

For assistance in fixing the error, contact the BCS TAC Inbox at DHSBCSTAC@dhs.wisconsin.gov or SAS at EDWDARtraining@SAS.com. Supply the topic to discuss during the one-hour training session plus dates and times to meet. **Note:** Include in the email that the times provided are CST.



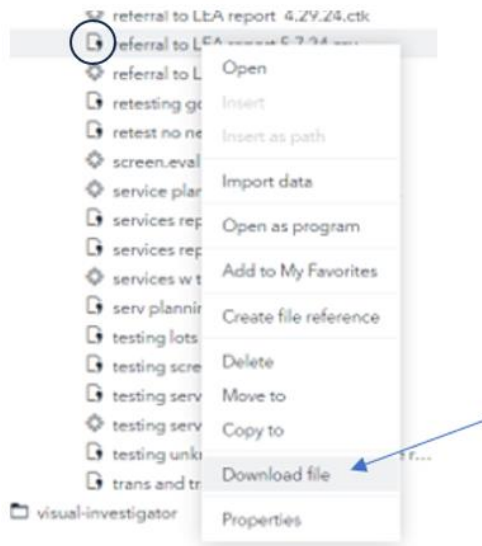
2. Once the query has run successfully, the report will be found in the location listed on the Output tab, in the “Exported File Location” field (e.g., /Users/(your email)/My Folder).

3.3 Opening and saving the report

3.3.1 Opening the report

1. Go to the “Exported File Location” (e.g., /Users/(your email)/My Folder).
2. Right click on the report name and choose “Download file.”

Note: A report is indicated by the paper icon in front of the report name.



3. Find the downloaded report on user’s computer and open it.

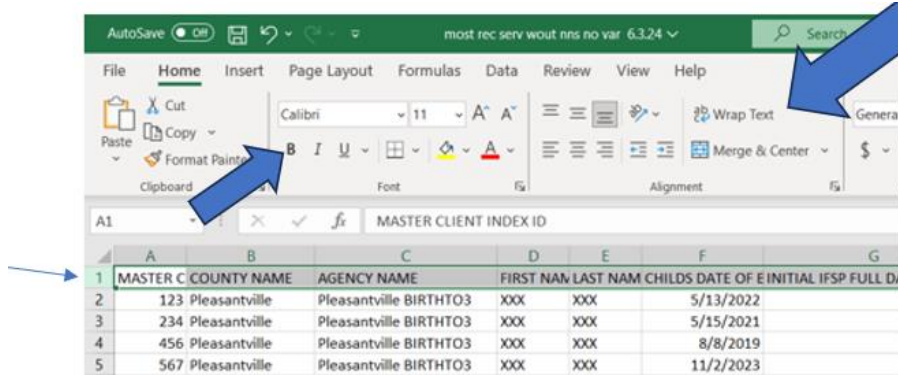
Note: Downloads may show up as a tab at the bottom left of the screen, in a box in the upper right, etc.

The report will open and appear to be in Excel.

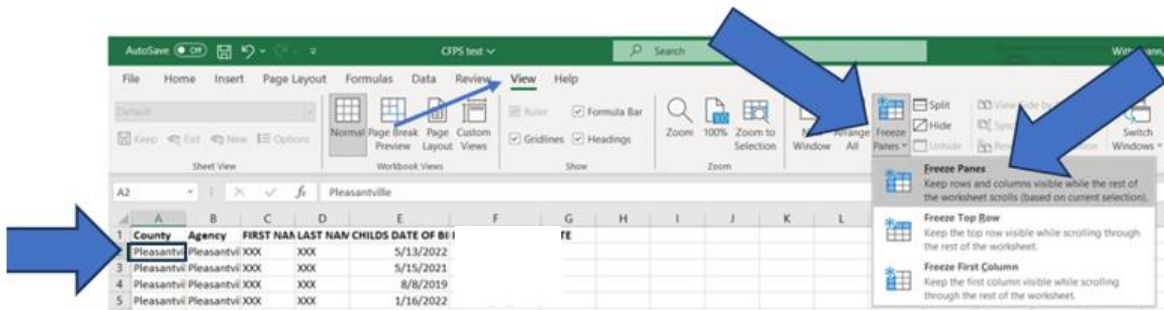
3.3.2 Readability

Recommendations to make the report more readable:

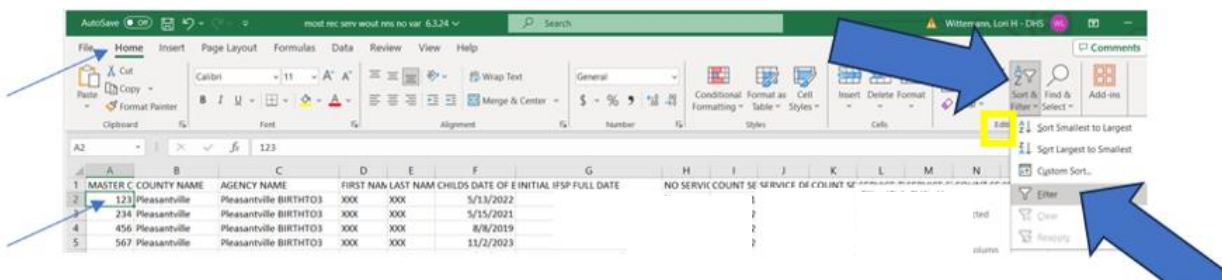
1. Highlight the first row (1) and click the bold icon (B) to bold the title row of the report.
2. While the first row is still highlighted, click on “Wrap Text.”



3. Click on “View” in the tabs to freeze the panes.
4. Click on the first cell of data (i.e., A2).
5. Click on “Freeze Panes” then choose the first choice, “Freeze Panes.”



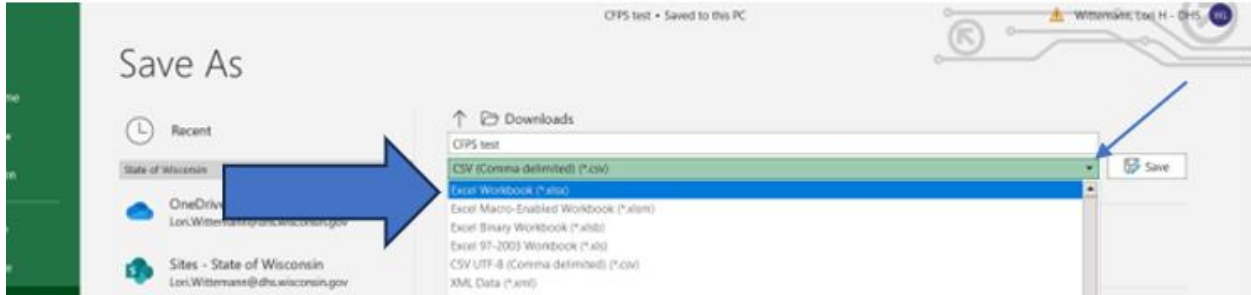
6. Click on the Home tab to add filtering availability to the report.
7. Click on the first cell under the title row.
8. Find “AZ Sort & Filter” in the Editing tab (see yellow box on right side of screenshot) and click on “AZ Sort & Filter” and choose “Filter.”



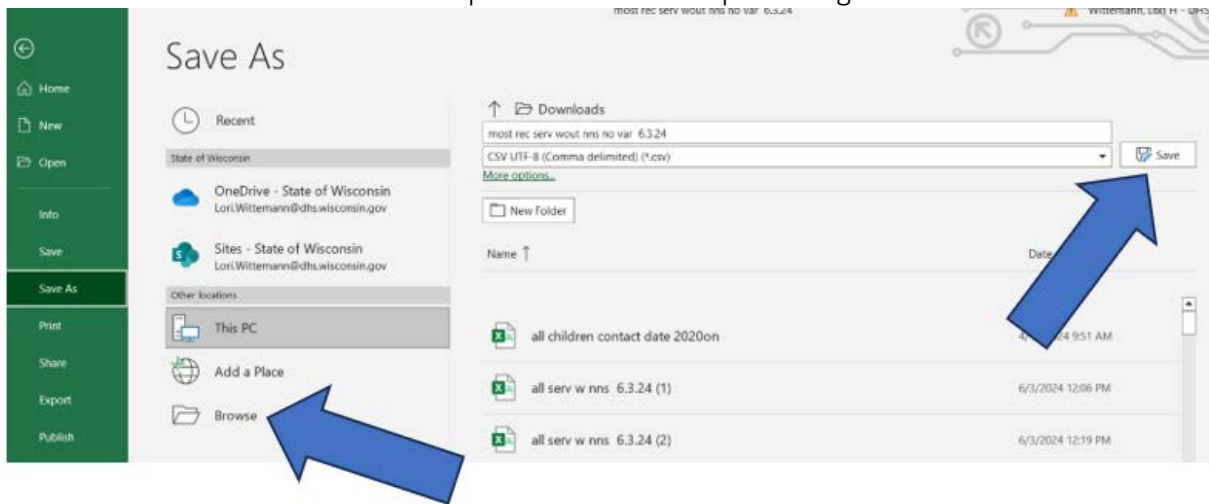
3.3.3 Saving

To save the report as an actual Excel document

1. Go to “File” then choose “Save As.”
2. Change the type of report from “CSV UTF-8 (Comma delimited) (*.csv)” to “Excel Workbook (*.xlsx)” by clicking on the dropdown arrow.



3. Choose where on the user’s computer to save the report using Browse and click “Save.”

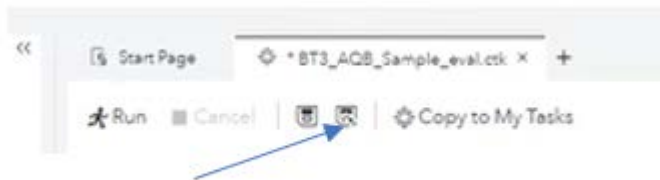


3.4 Saving and Closing the query

3.4.1 Saving the query

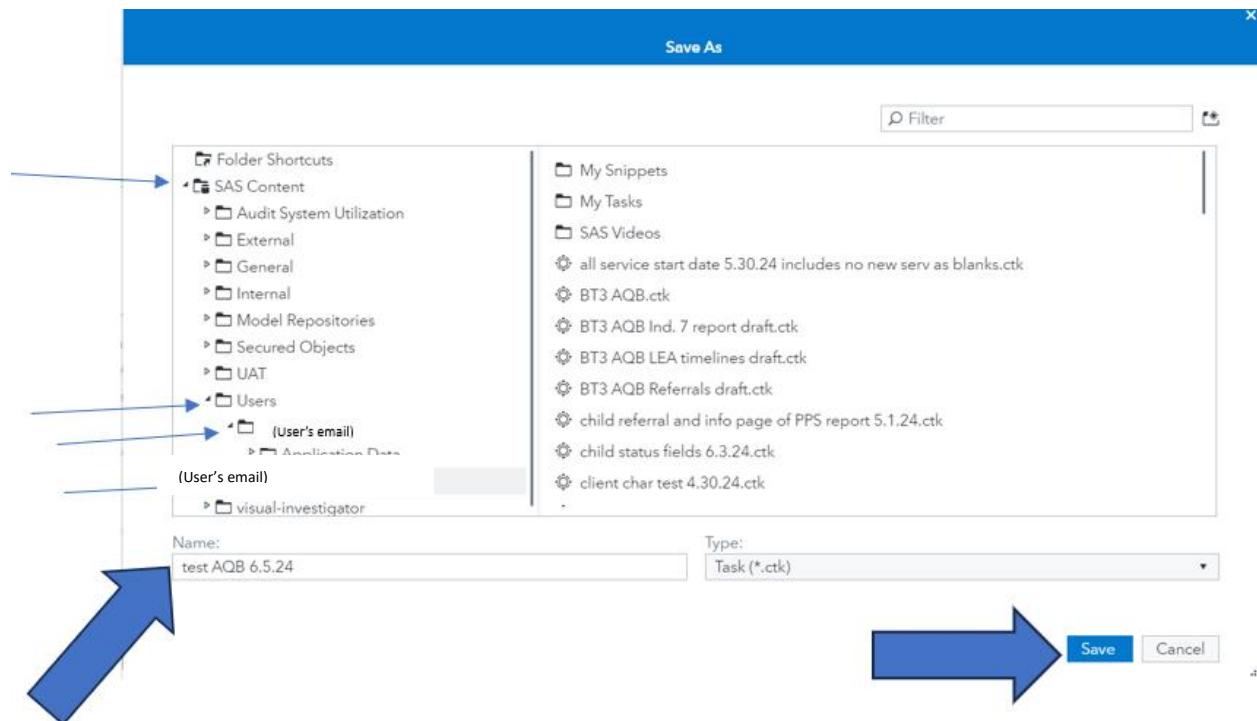
To save the query for re-running in the future

1. Click “Save As” from the query pane



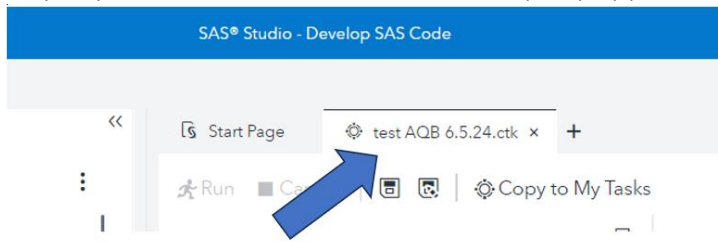
Another box opens.

2. In the left hand column go to “SAS Content/Users/(SAS User’s email address)/My Folder.”
3. Highlight the words “My Folder.”
4. In the “Name” field, enter a name for the query
5. Click the blue “Save” button.



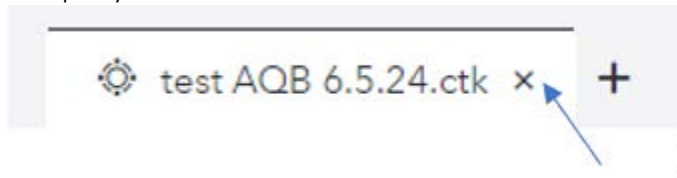
Note: The query will not be saved in the same place as the SAS or BCS prebuilt reports; it will be saved in the SAS users “My Folder.”

Note: The query is saved when the name of the query appears on the tab of the query.



3.4.2 Closing the query

1. To close the query, click on the “X” after the name of the query (i.e., “(name).ctlk”) on the query’s tab.



The query can now be accessed in the future from the user’s “My Folder.”

Note: The “sun” icon in front of the name indicates a query, along with ending with “.ctlk.”

