

RLSS Master Query: It's Easier Than You Think

Master Query is probably the most powerful and versatile component of the GMS-RLSS program. Beyond the standard selections on the Reports menu, Master Query can provide you with a variety of additional reports. All fields found within Loan Master file, including Optional Fields, can be queried to create a comprehensive report.

Although it might take a bit of practice to become proficient in using Master Query, there are only a few basic steps involved. We've tried to make it as simple as possible to create reports, including numbering the steps taken to do so.

1. Select the fields you wish to search – clicking on the drop menu will produce a list of all fields found within Loan Master, as well as some fields related to loan activity, an example being new balance. Think about which loans you want to appear on the report. For example, if you are looking for loans over \$10,000, select “loan amount”. If you are looking for loans that have made a payment recently, select “activity date.”

2. Search Criteria – once you have identified which field to search, step 2 gives you opportunity to determine what data you want to find within that field. If you are looking for loans over \$10,000, select “greater than” and enter 9999. If you are searching for loans that have made a recent payment, select “greater than” and enter the date as mm/dd/yy. Note: once you have completed steps 1 and 2, a screen prompt will appear asking “Do you wish to make more selections?” The search can be narrowed further by clicking on “yes” and making more selections in step 1.

3. Fields to be included on report – the field(s) selected in step 1 should also be included in step 3 to allow verification that the proper loans were identified, and is selected by clicking on the desired field. Any other available field in step 3 may be included on the report. To select more than one field in step 3, hold down the ctrl key and click on the additional fields.

4. Report Format – select “list the data” or “labels”.

5. Sort Options – reports can be sorted by either the loan number or alphabetically

Once the 5 steps are completed, there is an option to include the borrower's address. Another option is to save the report selections. This may be especially useful when creating a report that may be needed on an ongoing basis. If the saved criteria is later retrieved and the report created again, it will use updated information recorded in your database through adding or editing Loan Master files or through posting loan activity.

Once you click on “prepare report” the program will launch Microsoft Excel and move the data into a spreadsheet. At that point, formatting, sorting, adding formulas and saving the report become Excel options.

Things to Remember: Some fields selected in step 1 relate to combo boxes within the Loan Master file. A good example is “gender”, which when selected results in a display of “male” and

“female”, allowing you to check which gender is to be included on the report. Once you have selected the desired response, tap the enter key to move automatically to the “equal to” field in step #2. Click on the circle to the left of “equal to”, then tap enter again to move the choice made in step 1 automatically into step 2.

If the data to be included on the report includes a date range, it is necessary to select that field twice in step 1. If, for example, you want to pull a report reflecting loans closed in 2012, in step 1 select “closingdate” and in step 2 enter “greater than” 12/31/11. When prompted for more selections, respond “yes” and again select “closingdate” in step 1. This time, in step 2 enter “less than” 01/01/13. The resulting report will show all loans with a closing date within 2012.

Using Optional Fields in the report require a few more steps, and is outlined in the Help section of the program.

With a bit of practice, you’ll be able to create reports as needed. As always, feel free to call GMS Service if you need assistance with Master Query.