CUNYFirst Query Training: Learning the Basics

Marcus Richardson – Associate Director of Financial Aid

This presentation is based on a template provided by Mark Rivera from BMCC’s Office of Financial Aid
**Agenda**

- Records/Tables in CUNYfirst
- The query build lifecycle
- Creating a basic query from one table
  - Adding records, selecting fields, & adding criteria
- Editing a basic query
- Creating a Query with multiple tables (Joining Tables)
  - Joins
  - Effective Dates
  - Reviewing auto-joins
  - Reorder/Sort
- Reusability - creating prompts
What is a Query? Why do we create or run queries?

The What-
• A query is a request to retrieve specific information from records/tables from a database.

The Why-
• Reporting
• Reconciliation
• Auditing
• Running Processes
• Looking for Anomalies
• Testing the outcome of Processes
• Finding out how wide spread a problem is
Records/Tables

- A Record or Table is a collection of related data in a database
- A record Consists of Columns (Fields) and rows.
- They are different types of tables for different types of data.
  - Tables related to configuration and set up
  - Tables related to daily student transactions
### Fields, Rows, and Key Fields

<table>
<thead>
<tr>
<th>Empl ID</th>
<th>Aid Year</th>
<th>EFC</th>
</tr>
</thead>
<tbody>
<tr>
<td>1111111111</td>
<td>2014</td>
<td>30</td>
</tr>
<tr>
<td>1111111111</td>
<td>2015</td>
<td>50</td>
</tr>
<tr>
<td>2222222222</td>
<td>2014</td>
<td>0</td>
</tr>
<tr>
<td>2222222222</td>
<td>2015</td>
<td>9000</td>
</tr>
<tr>
<td>3333333333</td>
<td>2015</td>
<td>300</td>
</tr>
</tbody>
</table>
Common CUNYfirst Tables

- **SRVC_IND_DATA** → Student Service Indicator Data
- **STDNT_GRPS_HIST** → Student Group History
- **STDNT_ENRL** → Student Enrollment table
- **CLASS_TBL_SE_VW** → Class Table Student Enrollment View
- **ACAD_PROG** → Student Academic Program Table
- **STDNT_AWRD_DISB** → FA Award Disb.
- **STDNT_CAR_TERM** → Student Term Information pages
- **PERSON_CHECKLST** → Checklist Code data
- **VAR_DATA_FINA** → the variable data fields needed for aid year
- **SCC_PRI_NAME_VW** → Name Information
- **SCC_EMAIL_QVW** → E-Mail Addresses
- **ITEM_SF_VW** → Line Item Details (the Customer Account)
Creating a Query
Access to **Reporting HR/Campus Solutions** ➔ **Reporting Tools** ➔ **Query** ➔ **Query Manager**
Query Manager Homepage → Create New Query Link
Searching & Adding a Record - RECORDS Tab

• By clicking “Create New Query”, the Query Manager Tool opens with the 9 tabs that can be used in the building of the query.

• To begin, you would type in the name of the record/table you want to use in the Query. If you do not remember the exact name of the record, you can use the wildcard symbol ‘ % ’ and search by part of the characters in the record name.
**Scenario #1:** You want to see the start date and end date of the 2017 Aid Year for Brooklyn College.

We need to find record name that would contain that information.

My desire outcome should be one row of data.
Searching & Adding a Record- RECORDS Tab

- In this example, I am able to search for any record name that contains the word “aid” in the record name title by typing %AID.

- By clicking “Show Fields”, I can see all the field names contained in the record. To add the record to your query, you would click “Add Record”.
Show Fields

Fields for record AID_YEAR_TBL - Aid Year Table:

<table>
<thead>
<tr>
<th>Fieldname</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y</td>
<td>INSTITUTION - Academic Institution</td>
</tr>
<tr>
<td>Y</td>
<td>AID_YEAR - Aid Year</td>
</tr>
<tr>
<td></td>
<td>DESCR - Description</td>
</tr>
<tr>
<td></td>
<td>DESCRSHORT - Short Description</td>
</tr>
<tr>
<td></td>
<td>ACAD_YEAR_START - Academic Year Start Date</td>
</tr>
<tr>
<td></td>
<td>ACAD_YEAR_END - Academic Year End Date</td>
</tr>
</tbody>
</table>

Return
Add Record

• By clicking “Add Record”, the query manager tool opens the record in the “Query” tab so you can select the fields you want on your output as well as any manual criteria you would like to add.
Selecting Fields- QUERY tab

• By checking off the field checkbox, those fields would be included in your query output. The fields would now be viewable in the “Fields” tab of the query manager tool.
### The FIELDS tab

![Fields Tab](image)

**Fields Tab Description:**

View field properties, or use field as criteria in query statement.

<table>
<thead>
<tr>
<th>Col</th>
<th>Record Fieldname</th>
<th>Format</th>
<th>Ord</th>
<th>XLAT</th>
<th>Agg</th>
<th>Heading Text</th>
<th>Add Criteria</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A.INSTITUTION - Academic Institution</td>
<td>Char5</td>
<td></td>
<td></td>
<td></td>
<td>Institution</td>
<td><img src="image" alt="Add Criteria" /></td>
<td><img src="image" alt="Edit" /></td>
<td><img src="image" alt="Delete" /></td>
</tr>
<tr>
<td>2</td>
<td>A.AID_YEAR - Aid Year</td>
<td>Char4</td>
<td></td>
<td></td>
<td></td>
<td>Aid Yr</td>
<td><img src="image" alt="Add Criteria" /></td>
<td><img src="image" alt="Edit" /></td>
<td><img src="image" alt="Delete" /></td>
</tr>
<tr>
<td>3</td>
<td>A.DESCR - Description</td>
<td>Char30</td>
<td></td>
<td></td>
<td></td>
<td>Descr</td>
<td><img src="image" alt="Add Criteria" /></td>
<td><img src="image" alt="Edit" /></td>
<td><img src="image" alt="Delete" /></td>
</tr>
<tr>
<td>4</td>
<td>A.DESCRSHORT - Short Description</td>
<td>Char10</td>
<td></td>
<td></td>
<td></td>
<td>Short Desc</td>
<td><img src="image" alt="Add Criteria" /></td>
<td><img src="image" alt="Edit" /></td>
<td><img src="image" alt="Delete" /></td>
</tr>
<tr>
<td>5</td>
<td>A.ACAD_YEAR_START - Academic Year Start Date</td>
<td>Date</td>
<td></td>
<td></td>
<td></td>
<td>Acad Year St</td>
<td><img src="image" alt="Add Criteria" /></td>
<td><img src="image" alt="Edit" /></td>
<td><img src="image" alt="Delete" /></td>
</tr>
<tr>
<td>6</td>
<td>A.ACAD_YEAR_END - Academic Year End Date</td>
<td>Date</td>
<td></td>
<td></td>
<td></td>
<td>Acad Year End</td>
<td><img src="image" alt="Add Criteria" /></td>
<td><img src="image" alt="Edit" /></td>
<td><img src="image" alt="Delete" /></td>
</tr>
</tbody>
</table>
Now that I’ve selected my fields, what happens if I click Run?
You have too many rows of data with the information you do not want, multiple schools and multiple aid years!!!!!
The query would not answer just your question but it would also provide information you do not want such as the aid year start and end dates for all schools and all aid years.

**IMPORTANT**: Selecting your fields lets the query tool know what information you want to display from the record data but you need to add criteria to filter the output so you let the query tool know what information you do not want to display from the record data.

**NEVER RUN A QUERY WITHOUT PUTTING IN CRITERIA!**
The **FIELDS** tab

<table>
<thead>
<tr>
<th>Col</th>
<th>Record.Fieldname</th>
<th>Format</th>
<th>Ord</th>
<th>XLAT</th>
<th>Agg</th>
<th>Heading Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A.INSTITUTION - Academic Institution</td>
<td>Char5</td>
<td></td>
<td></td>
<td></td>
<td>Institution</td>
</tr>
<tr>
<td>2</td>
<td>A.AID_YEAR - Aid Year</td>
<td>Char4</td>
<td></td>
<td></td>
<td></td>
<td>Aid Yr</td>
</tr>
<tr>
<td>3</td>
<td>A.DESCRIPTION - Description</td>
<td>Char30</td>
<td></td>
<td></td>
<td></td>
<td>Descr</td>
</tr>
<tr>
<td>4</td>
<td>A.DESCRIPTIONSHORT - Short Description</td>
<td>Char10</td>
<td></td>
<td></td>
<td></td>
<td>Short Desc</td>
</tr>
<tr>
<td>5</td>
<td>A.ACAD_YEAR_START - Academic Year Start Date</td>
<td>Date</td>
<td></td>
<td></td>
<td></td>
<td>Acad Year St</td>
</tr>
<tr>
<td>6</td>
<td>A.ACAD_YEAR_END - Academic Year End Date</td>
<td>Date</td>
<td></td>
<td></td>
<td></td>
<td>Acad Year End</td>
</tr>
</tbody>
</table>
Adding Criteria

- In this example, I am telling the query tool that I want the institution to equal BKL01 in my output—this will filter out all other institutions. After inputting BKL01 as a constant, I will click “OK”.

![Diagram of query tool interface showing how to add criteria with a filter for institution equal to BKL01.](image-url)
Adding Criteria

• In this example, I am telling the query tool that I want the aid year to equal 2017 in my output— this will filter out all other aid years. After inputting 2017 as a constant, I will click “OK”.

![Diagram showing how to add criteria in a query tool. The diagram includes options to choose expression types, a field or expression for record and field, and options for defining a constant with the value 2017.]
The CRITERIA Tab

- By adding the criteria for specific fields within your query, the query manager tool adds this information in the CRITERIA tab.
If you are all set, now click RUN to view the output of the query.
### Query Output

<table>
<thead>
<tr>
<th>Institution</th>
<th>Aid Yr</th>
<th>Descr</th>
<th>Short Desc</th>
<th>Acad Year St</th>
<th>Acad Year End</th>
</tr>
</thead>
<tbody>
<tr>
<td>BKL01</td>
<td>2017</td>
<td>Financial Aid Year 2016-2017</td>
<td>2016-2017</td>
<td>05/31/2016</td>
<td>05/26/2017</td>
</tr>
</tbody>
</table>

**Run**

**Rerun Query | Download to Excel | Download to XML**

**1-1 of 1**
Concept

- Select the Records/Tables you need.
- Select the fields from the Records that you want on your query results/output.
- Select the criteria from the fields to filter your query to only show the data you want to see on your output.
- Confirm and click Run!
- If you received the desired output → Success
- If you have not received the desired output → review and revise the query by fixing your criteria (editing the current criteria/deleting criteria/adding new criteria)
Creating a query from one table

STDNT_CAR_TERM
Adding a Record - STDNT_CAR_TERM

Query Name: New Unsaved Query
Search By: Record Name
begins with: %STDNT_CAR_TERM

Search Results:
Record: STDNT_CAR_TERM - Student Career Term Table
Add Record

Save
Save As
New Query
Preferences
Properties
Publish as Feed
Publish as Pivot Grid
New Union

Return To Search
Selecting Fields - QUERY Tab
Selecting Fields- QUERY Tab

• Let’s Add:
  ✓EMPLID – Emp Id
  ✓ACAD_CAREER – Academic Career
  ✓INSTITUTION – Academic Institution
  ✓STRM - Term
  ✓ACADEMIC_LOAD – Academic Load
  ✓FA_LOAD – Financial Aid Load
# FIELDS Tab

<table>
<thead>
<tr>
<th>Col</th>
<th>Record Fieldname</th>
<th>Format</th>
<th>Ord</th>
<th>XLAT</th>
<th>App</th>
<th>Heading Text</th>
<th>Add Criteria</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A.EMPLID - Empl ID</td>
<td>Char11</td>
<td></td>
<td></td>
<td>ID</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>A.ACAD_CAREER - Academic Career</td>
<td>Char4</td>
<td></td>
<td></td>
<td>Career</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>A.INSTITUTION - Academic Institution</td>
<td>Char5</td>
<td></td>
<td></td>
<td>Institution</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>A.STRM - Term</td>
<td>Char4</td>
<td></td>
<td></td>
<td>Term</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>A.ACADEMIC_LOAD - Academic Load</td>
<td>Char1</td>
<td></td>
<td></td>
<td>Acad Load</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>A.FA_LOAD - Financial Aid Load</td>
<td>Char1</td>
<td></td>
<td>N</td>
<td>FA Load</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Adding Criteria
Adding Criteria

[Diagram showing the 'Edit Criteria Properties' window with options for choosing expression types and defining conditions.]
Viewing Criteria
You have created a query that provides all student enrollment in CUNYfirst for your school and for the 1182 or spring 2018 term. The query also lets you see the student academic career level.
If you received the desired outcome, you can save your private query
Saving a Query

- The Query Name cannot have any spaces, if you want to separate text or numbers, you can use an underscore “_”. The maximum characters for the query name is 30.

- In the description, you can use spaces and write up to 30 characters.

- I would recommend creating a folder to store your private queries. The folder is created by inputting the folder name when you are saving the query. To complete saving action, click “OK”.

![Query Saving Interface](image)

- Query Name: CU_FA_BKCL_ENROLL ASSESSMENT
- Description: Student Enrollment
- Folder: Marcus Rich

Query Definition:

[Text box for query definition]

[Buttons: OK, Cancel]
Saving a Query

• You now see the name and description of the query on the top of the page.
Using Long Descriptions or Changing Heading Text

• If you see a value in the XLAT column, it means these fields have translated value options. To use this option or change the heading text, click “Edit”.

![Diagram of a table showing fields and their descriptions]
Editing Heading Text or Translated Values

Edit Field Properties

Field Name: A.FA_LOAD - Financial Aid Load

Heading
- No Heading
- Text
- RFT Short
- RFT Long

Heading Text: FA Load

*Unique Field Name: A.FA_LOAD

Aggregate
- None
- Sum
- Count
- Min
- Max
- Average

Translate Value
- None
- Short
- Long

Effective Date for Short/Long
- Current Date

Field
- Expression

Add Prompt
Add Field

OK
Cancel
Editing Heading Text or Translated Values

Edit Field Properties

Field Name: A_FA_LOAD - Financial Aid Load

Heading
- No Heading
- Text
- RFT Short
- RFT Long

Heading Text
FA Load

*Unique Field Name
A_FA_LOAD

Aggregate
- None
- Sum
- Count
- Min
- Max
- Average

Translate Value
- None
- Short
- Long

Effective Date for Short/Long
- Current Date
- Field
- Expression

Add Prompt
Add Field

OK
Cancel
Editing Heading Text or Translated Values
### Editing Heading Text or Translated Values

<table>
<thead>
<tr>
<th>ID</th>
<th>Career</th>
<th>Institution</th>
<th>Term</th>
<th>Acad Load</th>
<th>FA Load</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>GRAD</td>
<td>BKL01</td>
<td>1182</td>
<td>N</td>
<td>No Unit Load</td>
</tr>
<tr>
<td>2</td>
<td>GRAD</td>
<td>BKL01</td>
<td>1182</td>
<td>N</td>
<td>No Unit Load</td>
</tr>
<tr>
<td>3</td>
<td>GRAD</td>
<td>BKL01</td>
<td>1182</td>
<td>H</td>
<td>Enrolled Half-Time</td>
</tr>
<tr>
<td>4</td>
<td>GRAD</td>
<td>BKL01</td>
<td>1182</td>
<td>H</td>
<td>Enrolled Half-Time</td>
</tr>
<tr>
<td>5</td>
<td>GRAD</td>
<td>BKL01</td>
<td>1182</td>
<td>H</td>
<td>Enrolled Half-Time</td>
</tr>
<tr>
<td>6</td>
<td>GRAD</td>
<td>BKL01</td>
<td>1182</td>
<td>F</td>
<td>Enrolled Full-Time</td>
</tr>
</tbody>
</table>
Editing a query from one table

STDNT_CAR_TERM
Using Query Manager to search & edit
Editing an Existing Query

• You can edit an existing query to make modifications OR to make a new query based off the existing query.

• **IMPORTANT**: If you want to make a new query based off the existing query, please remember to use the “SAVE AS” feature to save the query under a new name so the existing query will not be overridden.
Editing an Existing Query

Enter a name to save this query as:

*Query: CU_CAASS_BKL_ENROLL_ASSESSME
Description: Student Enrollment
Folder: JESUS PEREZ
*Query Type: User
*Owner: Private

Query Definition:
**Editing an Existing Query - Adding a new criteria**

View field properties, or use field as criteria in query statement.

<table>
<thead>
<tr>
<th>Col</th>
<th>Record.Fieldname</th>
<th>Format</th>
<th>Ord</th>
<th>XLA</th>
<th>Agg</th>
<th>Heading Text</th>
<th>Add Criteria</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A.EMPLID - Empl ID</td>
<td>Char11</td>
<td></td>
<td></td>
<td></td>
<td>ID</td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>A.ACAD_CAREER - Academic Career</td>
<td>Char4</td>
<td></td>
<td></td>
<td></td>
<td>Career</td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>A.INSTITUTION - Academic Institution</td>
<td>Char5</td>
<td></td>
<td></td>
<td></td>
<td>Institution</td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>A.STRM - Term</td>
<td>Char4</td>
<td></td>
<td></td>
<td></td>
<td>Term</td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>A.ACADEMIC_LOAD - Academic Load</td>
<td>Char1</td>
<td></td>
<td></td>
<td></td>
<td>Acad Load</td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>A.FA_LOAD - Financial Aid Load</td>
<td>Char1</td>
<td>L</td>
<td></td>
<td></td>
<td>FA Load</td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
</tbody>
</table>

[Image of a webpage with a table and a highlighted cell.]
Editing an Existing Query - Adding a new criteria
Editing an Existing Query - Adding a new criteria

<table>
<thead>
<tr>
<th>Logical</th>
<th>Expression1</th>
<th>Condition Type</th>
<th>Expression 2</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>A.INSTITUTION - Academic Institution</td>
<td>equal to</td>
<td>BKL01</td>
<td>Edit</td>
<td>−</td>
</tr>
<tr>
<td>AND</td>
<td>A.STRM - Term</td>
<td>equal to</td>
<td>1182</td>
<td>Edit</td>
<td>−</td>
</tr>
<tr>
<td>AND</td>
<td>A.FA_LOAD - Financial Aid Load</td>
<td>equal to</td>
<td>F</td>
<td>Edit</td>
<td>−</td>
</tr>
</tbody>
</table>

[Image of a user interface showing a query with criteria for academic institution, term, and financial aid load, with options to edit or delete each criterion.]
Now we have one query to identify all students registered full-time for term 1182 or spring 2018 and their academic career status.
Creating a Query with multiple tables (Joining Tables)

STDNT_CAR_TERM & ACAD_PROG
Joining Related Records

Record 1

Record 2

Shared Fields
How Joining Restricts Your Data

STDNT_CAR_TERM

ACAD_PROG

Note: Standard Inner Join on all Key Values
Query Manager Homepage ➔ Create New Query Link

Let’s add the STDNT_CAR_TERM record
Adding a Record - STDNT_CAR_TERM
Selecting Fields - QUERY Tab

Chosen Records

Alias | Record
--- | ---
A | STDT_CARE_TERM - Student Career Term Table

Fields

- EMPLID - Emp ID
- ACAD_CAREER - Academic Career
- INSTITUTION - Academic Institution
- STRM - Term
- REG_CARD_DATE - Registration Card Date
- WITHDRAW_CODE - Withdrawal / Cancel
- WITHDRAW_REASON - Withdrawal / Cancel Reason
- WITHDRAW_DATE - Withdrawal / Cancel Date
- LAST_DATE_ATTENDED - Last Date of Attendance
- STDT_CARE_NBR - Student Career Nbr
- ACAD_FROG_PRIMARY - Primary Academic Program
- ACAD_LOAD_APPR - Approved Academic Load
- ACADEMIC_LOAD - Academic Load
- FA_LOAD - Financial Aid Load
Selecting Fields - QUERY Tab

• Let’s add only these 3 fields:
  ✔ EMPLID – Emp Id
  ✔ ACAD_CAREER – Academic Career
  ✔ INSTITUTION – Academic Institution
  ✔ STRM - Term
  ✔ ACADEMIC_LOAD – Academic Load
  ✔ FA_LOAD – Financial Aid Load
Now let’s go back to the RECORD tab

Click “Join Record” to join the ACAD_PLAN record to the STDNT_CAR_TERM record
Select what record to join with **STDNT_CAR_TERM**

Click the “**A = STDNT_CAR_TERM**” record to complete the join.
Auto-Join Criteria ➔ What Fields to Join On?

When you join records in Campus Solutions you will automatically be prompted to join the records using matching key fields. Most of the time these join suggestions are good and should be followed.
Selecting Fields- QUERY Tab

- Let’s add only these 3 fields:
  - ACAD_PLAN – Academic Plan
  - DECLARE_DT – Declare Date
  - REQ_TERM – Requirement Term
Field Tab-
Let’s add criteria to set the query for BKL01, 1179 term, and an enrollment status not equal to “N”.

Query Name: New Unsaved Query

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Format</th>
<th>Ord</th>
<th>XLAT</th>
<th>Age</th>
<th>Heading Text</th>
<th>Add Criteria</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.EMPLID - Empl ID</td>
<td>Char11</td>
<td></td>
<td></td>
<td></td>
<td>ID</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A.ACAD_CAREER - Academic Career</td>
<td>Char4</td>
<td></td>
<td></td>
<td></td>
<td>Career</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A.INSTITUTION - Academic Institution</td>
<td>Char5</td>
<td></td>
<td></td>
<td></td>
<td>Institution</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A.STRM - Term</td>
<td>Char4</td>
<td></td>
<td></td>
<td></td>
<td>Term</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A.ACADEMIC_LOAD - Academic Load</td>
<td>Char1</td>
<td></td>
<td></td>
<td></td>
<td>Acad Load</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A.FA_LOAD - Financial Aid Load</td>
<td>Char1</td>
<td>N</td>
<td></td>
<td></td>
<td>FA Load</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B.ACAD_PLAN - Academic Plan</td>
<td>Char10</td>
<td></td>
<td></td>
<td></td>
<td>Acad Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B.DECREATE_DT - Declare Date</td>
<td>Date</td>
<td></td>
<td></td>
<td></td>
<td>Decl Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>B.REQ_TERM - Requirement Term</td>
<td>Char4</td>
<td></td>
<td></td>
<td></td>
<td>Req Term</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Adding Criteria- Institution
Adding Criteria - Term

Edit Criteria Properties

Choose Expression 1 Type
- Field
- Expression

Expression 1

Choose Record and Field
- Record Alias, Fieldname
  - A STRM - Term

*Condition Type equal to

Choose Expression 2 Type
- Field
- Expression
- Constant
- Prompt
- Subquery

Expression 2

Define Constant
- Constant [175]

OK Cancel
Adding Criteria- FA Load- NOT EQUAL TO

Under the condition type, let’s use the drop down and instead of “equal to”, change the type to “not equal to”
<table>
<thead>
<tr>
<th>ID</th>
<th>Career</th>
<th>Institution</th>
<th>Term</th>
<th>Acad Load</th>
<th>FA Load</th>
<th>Acad Plan</th>
<th>Decl Date</th>
<th>Req Term</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>GRAD</td>
<td>BKLO1</td>
<td>1179</td>
<td>H</td>
<td>H</td>
<td>ENGTCHR-MA</td>
<td>05/30/2016</td>
<td>1166</td>
</tr>
<tr>
<td>2</td>
<td>GRAD</td>
<td>BKLO1</td>
<td>1179</td>
<td>H</td>
<td>H</td>
<td>COMHTH-MA</td>
<td>06/01/2017</td>
<td>1179</td>
</tr>
<tr>
<td>3</td>
<td>GRAD</td>
<td>BKLO1</td>
<td>1179</td>
<td>F</td>
<td>F</td>
<td>CINART-MFA</td>
<td>03/29/2016</td>
<td>1166</td>
</tr>
<tr>
<td>4</td>
<td>GRAD</td>
<td>BKLO1</td>
<td>1179</td>
<td>L</td>
<td>L</td>
<td>MUS-MA</td>
<td>06/29/2015</td>
<td>1156</td>
</tr>
<tr>
<td>5</td>
<td>GRAD</td>
<td>BKLO1</td>
<td>1179</td>
<td>F</td>
<td>F</td>
<td>SP-MSED</td>
<td>03/24/2016</td>
<td>1166</td>
</tr>
<tr>
<td>6</td>
<td>GRAD</td>
<td>BKLO1</td>
<td>1179</td>
<td>F</td>
<td>F</td>
<td>ELSBL-MSED</td>
<td>05/11/2016</td>
<td>1166</td>
</tr>
<tr>
<td>7</td>
<td>UGRD</td>
<td>BKLO1</td>
<td>1179</td>
<td>L</td>
<td>L</td>
<td>CYS-BA</td>
<td>05/09/2016</td>
<td>1162</td>
</tr>
<tr>
<td>8</td>
<td>GRAD</td>
<td>BKLO1</td>
<td>1179</td>
<td>L</td>
<td>L</td>
<td>NONDG-GR</td>
<td>08/02/2017</td>
<td>1179</td>
</tr>
<tr>
<td>9</td>
<td>GRAD</td>
<td>BKLO1</td>
<td>1179</td>
<td>H</td>
<td>H</td>
<td>ECHT-MSED</td>
<td>01/20/2015</td>
<td>1152</td>
</tr>
<tr>
<td>10</td>
<td>UGRD</td>
<td>BKLO1</td>
<td>1179</td>
<td>H</td>
<td>H</td>
<td>BMF-BS</td>
<td>04/06/2017</td>
<td>1176</td>
</tr>
</tbody>
</table>
Save the query
Let’s Get the Names!

<table>
<thead>
<tr>
<th>Record Name</th>
<th>Personalize</th>
<th>Find</th>
<th>View All</th>
<th>Join Record</th>
<th>Show Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCC_PRI_NAME_VW - Current Primary Name View</td>
<td>Join Record</td>
<td>Show Fields</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Let’s Join It to Table $A = STDNT\_CAR\_TERM$
Auto Join Criteria

Query has detected the join conditions shown below.
Use the checkboxes to unselect the criteria that you do not want to add to the query and click add criteria when done. The criteria added can always be modified later using the criteria tab.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>A.EMPLID - Empl ID = C.EMPLID - Empl ID</th>
</tr>
</thead>
</table>

[Add Criteria] [Cancel]
This message means that the query tool has auto-created a criteria to receive the current or most recent row of data. In this example, a student may have multiple names in CUNYfirst but with the effective date, we receive the most current primary name in the system.
Selecting Fields- QUERY Tab

• Let’s add only these 2 fields:
  ✓ LAST_NAME
  ✓ FIRST_NAME
# Fields Tab

<table>
<thead>
<tr>
<th>Col</th>
<th>Record.FieldName</th>
<th>Format</th>
<th>Ord</th>
<th>XLAT</th>
<th>Ang</th>
<th>Heading Text</th>
<th>Add Criteria</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A.EMPLID - Emp ID</td>
<td>Char11</td>
<td>1</td>
<td></td>
<td></td>
<td>ID</td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>A.ACAD_CAREER - Academic Career</td>
<td>Char4</td>
<td>4</td>
<td></td>
<td></td>
<td>Career</td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>A.INSTITUTION - Academic Institution</td>
<td>Char5</td>
<td>5</td>
<td></td>
<td></td>
<td>Institution</td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>A.STRM - Term</td>
<td>Char4</td>
<td>4</td>
<td></td>
<td></td>
<td>Term</td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>A.ACADEMIC_LOAD - Academic Load</td>
<td>Char1</td>
<td>1</td>
<td></td>
<td></td>
<td>Acad Load</td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>A.FA_LOAD - Financial Aid Load</td>
<td>Char10</td>
<td>10</td>
<td></td>
<td></td>
<td>FA Load</td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>B.ACAD_PLAN - Academic Plan</td>
<td>Char10</td>
<td>10</td>
<td>N</td>
<td></td>
<td>Acad Plan</td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>B.DECLARE_DT - Declare Date</td>
<td>Date</td>
<td>4</td>
<td></td>
<td></td>
<td>Decl Date</td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>B.REQ_TERM - Requirement Term</td>
<td>Char4</td>
<td>4</td>
<td></td>
<td></td>
<td>Reg Term</td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>C.LAST_NAME - Last Name</td>
<td>Char30</td>
<td>30</td>
<td></td>
<td></td>
<td>Last</td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>C.FIRST_NAME - First Name</td>
<td>Char30</td>
<td>30</td>
<td></td>
<td></td>
<td>First Name</td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
</tbody>
</table>
Let’s Live on the Wild Side and Add Another Record!

Let’s Add the SCC_EMAIL_QVW Table!

<table>
<thead>
<tr>
<th>Record</th>
<th>Personalize</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMAIL_FERPA_VW - EMAIL FERPA VIEW</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SCC_EMAIL_QVW - Email Addresses Query View</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SCC_STG_EMAIL - Email Addresses</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TYPE_CNTL_EMAIL - Email type control</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
If any of our perviously joined records contained an address type and now we are adding a second with SCC_EMAIL_QVW, we would be filtering out students whose CF e-mails were not the same! Let’s remove this auto-join because we know the data may not be the same.
Selecting Fields- QUERY Tab

- Let's add only these 2 fields:
  - EMAIL_ADDR
  - PREFER_EMAIL_FLAG
**Fields Tab View- Let’s Add Criteria on the preferred e-mail address**

![Image of a webpage showing a table with fields and options for adding criteria. The table includes columns for Field Name, Record Fieldname, Format, Description, and Add Criteria. There are options to save and publish the query.](image_url)
Adding Criteria- a “Y” for preferred e-mail so we receive one row per student
Let’s review and run!
Let’s Reorder and Sort Query Output- similar to Excel
## Edit Field Ordering

Reorder columns by entering column numbers on the left. Columns left blank or assigned a 0 will be automatically assigned a number. Change the order by number by entering numbers on the right. To remove an order by number, leave the field blank or enter a 0.

<table>
<thead>
<tr>
<th>New Column</th>
<th>Column</th>
<th>Record.FieldName</th>
<th>Order</th>
<th>Descending</th>
<th>New Order By</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>A.EMPLID - Empl ID</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>2</td>
<td>A.ACAD_CAREER - Academic Career</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td>A.INSTITUTION - Academic Institution</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>4</td>
<td>A.STRM - Term</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>5</td>
<td>A.ACADEMIC_LOAD - Academic Load</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>6</td>
<td>A.FA_LOAD - Financial Aid Load</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>7</td>
<td>B.ACAD_PLAN - Academic Plan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>8</td>
<td>B.DECLARE_DT - Declare Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>9</td>
<td>B.REQ_TERM - Requirement Term</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>10</td>
<td>C.LAST_NAME - Last Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>11</td>
<td>C.FIRST_NAME - First Name</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>12</td>
<td>D.EMAILADDR - Email Address</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>13</td>
<td>D.PREF_EMAIL_FLAG - Preferred</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[Image of a form with column ordering options]
## Fields Tab

### Query Name: CU_FA_BKL_ENROLL_ACAD_ASSESS
### Description: Enrollment w/ STDNT ACAD PLAN

View field properties, or use field as criteria in query statement.

<table>
<thead>
<tr>
<th>Fields</th>
<th>Record/Fieldname</th>
<th>Format</th>
<th>Ord</th>
<th>XLA</th>
<th>Add Criteria</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>EMPID - Empi ID</td>
<td>Char11</td>
<td></td>
<td></td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>LAST_NAME - Last Name</td>
<td>Char30</td>
<td></td>
<td></td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>FIRST_NAME - First Name</td>
<td>Char30</td>
<td></td>
<td></td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>ACAD_CAREER - Academic Career</td>
<td>Char4</td>
<td></td>
<td></td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>INSTITUTION - Academic Institution</td>
<td>Char5</td>
<td></td>
<td></td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>STRM - Term</td>
<td>Char4</td>
<td></td>
<td></td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>ACADEMIC_LOAD - Academic Load</td>
<td>Char1</td>
<td></td>
<td></td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>FA_LOAD - Financial Aid Load</td>
<td>Char1</td>
<td></td>
<td>N</td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>ACAD_PLAN - Academic Plan</td>
<td>Char10</td>
<td></td>
<td></td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>DECLARE_GT - Declare Date</td>
<td>Date</td>
<td></td>
<td></td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>REQ_TERM - Requirement Term</td>
<td>Char4</td>
<td></td>
<td></td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>EMAIL_ADDR - Email Address</td>
<td>Char70</td>
<td></td>
<td></td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>PREF_EMAIL_FLAG - Preferred</td>
<td>Char1</td>
<td></td>
<td></td>
<td></td>
<td>Edit</td>
<td></td>
</tr>
</tbody>
</table>

---

Save  | Save As  | New Query  | Preferences  | Properties  | Publish as Feed  | Publish as Pivot Grid  | New Union
If you are all set, now click RUN to view the output of the query.
Success!!

The query ran successfully and also resulted in the same number of rows. This would mean that our joining tables did not filter any students off the report.

<table>
<thead>
<tr>
<th>ID</th>
<th>Last</th>
<th>First Name</th>
<th>Career</th>
<th>Institution</th>
<th>Term</th>
<th>Acad Load</th>
<th>FA Load</th>
<th>Acad Plan</th>
<th>Decl Date</th>
<th>Req Term</th>
<th>Email</th>
<th>Preferred</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>GRAD</td>
<td>BKL01</td>
<td>1179</td>
<td>H</td>
<td>H</td>
<td>ENGTCHRMA</td>
<td>05/30/2016</td>
<td>1166</td>
<td><a href="mailto:edgo98@gmail.com">edgo98@gmail.com</a></td>
<td>Y</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td>GRAD</td>
<td>BKL01</td>
<td>1179</td>
<td>H</td>
<td>H</td>
<td>COMHTRA MA</td>
<td>06/01/2017</td>
<td>1179</td>
<td><strong>[Redacted]</strong></td>
<td>Y</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td></td>
<td>GRAD</td>
<td>BKL01</td>
<td>1179</td>
<td>F</td>
<td>F</td>
<td>CINARTMFA</td>
<td>03/29/2016</td>
<td>1166</td>
<td><a href="mailto:elizabeth.balla@fitnyc.edu">elizabeth.balla@fitnyc.edu</a></td>
<td>Y</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td></td>
<td>GRAD</td>
<td>BKL01</td>
<td>1179</td>
<td>L</td>
<td>L</td>
<td>MUSMA</td>
<td>06/29/2015</td>
<td>1156</td>
<td><a href="mailto:norwegianwood60@gmail.com">norwegianwood60@gmail.com</a></td>
<td>Y</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td></td>
<td>GRAD</td>
<td>BKL01</td>
<td>1179</td>
<td>F</td>
<td>F</td>
<td>SP-MSED</td>
<td>03/24/2016</td>
<td>1166</td>
<td><a href="mailto:ramona.jagannath12@bcmail.brooklyn.cuny.edu">ramona.jagannath12@bcmail.brooklyn.cuny.edu</a></td>
<td>Y</td>
</tr>
<tr>
<td>6</td>
<td></td>
<td></td>
<td>GRAD</td>
<td>BKL01</td>
<td>1179</td>
<td>F</td>
<td>F</td>
<td>ELSBL-MSED</td>
<td>05/11/2016</td>
<td>1166</td>
<td><a href="mailto:kaylashley40@bcmail.brooklyn.cuny.edu">kaylashley40@bcmail.brooklyn.cuny.edu</a></td>
<td>Y</td>
</tr>
<tr>
<td>7</td>
<td></td>
<td></td>
<td>UGRD</td>
<td>BKL01</td>
<td>1179</td>
<td>L</td>
<td>L</td>
<td>CYS-BA</td>
<td>05/09/2016</td>
<td>1162</td>
<td><a href="mailto:tishima.brown17@bcmail.brooklyn.cuny.edu">tishima.brown17@bcmail.brooklyn.cuny.edu</a></td>
<td>Y</td>
</tr>
</tbody>
</table>
**Reusability**

- Queries are often used over multiple semesters. Rather than making a new query for every aid year or every time the term changes you can create a prompt which will allow you to change your criteria value every time the query is run. For example, in our previous query we added a criteria for the TERM. Let’s edit that to become a reusable PROMPT.
Editing Prompt Properties

Field Name: STRM
*Type: Character
*Format: Number Only
Length: 4
Decimals: None

*Heading Type: RFT Short
Heading Text: Term

*Unique Prompt Name: BIN1

*Edit Type: Prompt Table
Prompt Table: TERM_VAL_TBL

Optional: None
Default Value: 

OK  Cancel
### Prompts in the criteria tab

<table>
<thead>
<tr>
<th>Logical</th>
<th>Criteria</th>
<th>Condition Type</th>
<th>Expression 2</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>▼</td>
<td>A.EMPLID - Empl ID</td>
<td>equal to</td>
<td>B.EMPLID - Empl ID</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>AND</td>
<td>A.ACAD_CAREER - Academic Career</td>
<td>equal to</td>
<td>B.ACAD_CAREER - Academic Career</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>AND</td>
<td>B.STDNT_CAR_NBR - Student Career Nbr</td>
<td>equal to</td>
<td>A.STDNT_CAR_NBR - Student Career Nbr</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>AND</td>
<td>B.EFFDT - Effective Date</td>
<td>Eff Date &lt;=</td>
<td>Current Date (EffSeq = Last)</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>AND</td>
<td>A.INSTITUTION - Academic Institution</td>
<td>equal to</td>
<td>BK10101</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>AND</td>
<td>A.STRM - Term</td>
<td>equal to</td>
<td>1</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>AND</td>
<td>A.FA_LOAD - Financial Aid Load</td>
<td>not equal to</td>
<td>N</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>AND</td>
<td>A.EMPLID - Empl ID</td>
<td>equal to</td>
<td>C.EMPLID - Empl ID</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>AND</td>
<td>C.EFFDT - Effective Date</td>
<td>Eff Date &lt;=</td>
<td>Current Date</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>AND</td>
<td>A.EMPLID - Empl ID</td>
<td>equal to</td>
<td>D.EMPLID - Empl ID</td>
<td>Edit</td>
<td></td>
</tr>
<tr>
<td>AND</td>
<td>D.PREF_EMAIL_FLAG - Preferred</td>
<td>equal to</td>
<td>Y</td>
<td>Edit</td>
<td></td>
</tr>
</tbody>
</table>
Prompt tab view
Prompt tab view – in run mode
Recap

- Records/Tables in CUNYfirst
- The query build lifecycle
- Creating a basic query from one table
  - Adding records, selecting fields, & adding criteria
- Editing a basic query
- Creating a Query with multiple tables (Joining Tables)
  - Joins
  - Effective Dates
  - Reviewing auto-joins
  - Reorder/Sort
- Reusability- creating prompts
CUNYfirst Table Shortcut

• In order to find records or tables that contain the data or fields you wish to query in CUNYfirst. You can use the following shortcut.

• In Google Chrome, right click on the page in CUNYfirst that contains the data you need.

• Then click on “Inspect”.

![Image of Chrome Inspect menu]
CUNYfirst Table Shortcut

• Then select the cursor selection tool from the interface that pops up.
CUNYfirst Table Shortcut

- Use the cursor to hover over the data you are interested in finding the table for use within your query.

- The name of the table will appear. In this case ACAD_PROG. Please be aware that sometimes the address in concatenated with both the table name and the field following. In this case the field is TBL_DESCR. If you put in the full ACAD_PROG_TBL_DESCR you may not get any results when you search for the table to add it to your query.

- Please be aware that sometimes this shows a field that starts with DERIVED. That is not a table, but data that is derived from the calculation of other table information.