Review of CUNYfirst Reporting Instances

June 24, 2014
Agenda

• Introduction
• Meeting Logistics
• What are the reporting instances
• Overview of features (Demo)
• Reporting web page
• Access
• How do you learn to create queries, find tables, etc.
• What’s coming
Judith Ullman, CIS

- Application and Technical Support Manager
- judith.ullman@cuny.edu
- 212-541-1028
Logistics

• Reason for meeting – introduce financial staff to the reporting instances

• Logistics.
  – Session is being recorded
  – Length of meeting – one hour plus questions
  – Opportunities for questions: chat, email
  – Documents will be available on the CUNYfirst Reporting page:
    http://www.cuny.edu/about/administration/offices/CIS/CUNYfirst/reporting.html
What are the reporting instances

Nightly copy of production for querying

- Why not query in production (best practices)
- Refreshes are midnight till 1:30am (Finance) and till 6am (HCM/CS)
What are the reporting instances

Full nightly copy, with a few differences

• The only applications are reporting tools, process monitor, recurrences

• Queries are not overwritten – what was written in the RI, stays in the RI

• Includes all production queries as of April, 2013, in order to keep from overwriting

• Security structure is structured for querying – record/tree based
Overview of features (Demo)

- Instance Names – show in URL
- CUNYfirst > Reporting Financials > Reporting Tools > Query
- CUNYfirst > Reporting HR/Campus Solutions > Reporting Tools > Query
Overview of features (Demo)

Query Viewer

- HTML
- Excel
Overview of features (Demo)

• Query Viewer
  – Schedule – use for large or slow queries

• Schedule Queries
  – Run Control IDs
  – Run Control Instructions Reference
Overview of features (Demo)

• Query Manager
Reporting web page

- Reporting web page
  - FAQ
  - Learning materials
Access

• To the Reporting Instances
  – Review forms

• To queries
  – Query can’t be found
  – Query can be found but don’t have access
How do you learn to create queries, find tables, etc.

- Peers
- Listserv
What’s coming

• Synch queries with prod
• Enhanced security structure
http://www.cuny.edu/about/administration/offices/CIS/CUNYfirst/reporting.html