Using PS Query in the Reporting Instances

April 25, 2014
Presenter

Judith Ullman, CIS
- Application and Technical Support Manager
- judith.ullman@cuny.edu
- 212-541-1028
Agenda

1. Navigation to Query Manager
2. Query Manager
3. Create New Query
   A. Find Enrollment Record
   B. Add Record
   C. Add Fields
   D. Save
   E. Add Criteria
   F. Run
   G. Sort
   H. Field Order
   I. Join Class Info
   J. Add Class Fields
   K. Join Name Info
   L. Add Name Fields
   M. Effective Date Criteria
   N. Security Joins
4. Add Query to Favorites
5. Questions
Login to CUNYfirst. Choose the appropriate reporting instance.
Choose Reporting Tools.
Choose Query Manager.
Review this page: Search, Favorites, Private vs. Public.
Start creating a new query.
Search for the desired record.
Find and add the desired record.
Choose the desired fields.
Save.
Add properties to Save.
Add Criteria for EMPLID.
Choose Fieldname.
Choose Fieldname EMPLID.
Condition Type is “equal to”. Expression 2 Type is “Constant”.
Add the constant EMPLID 12242486.
Run the query.
Note the results are not quite as useful as we would like. We want to order the results by Term, and move Institution to the leftmost column.
Sorting is accomplished on the Fields tab. Choose “Reorder/Sort”.
Number the columns in the “New Order By” column. Choose “Descending” if desired.
Assign Term to be sorted first.
The data have now been sorted by TERM.
Now notice the field order; we wish to put INSTITUTION on the left.
The order of the fields is assigned on the Fields tab.
Choose “Reorder/Sort”.
Assign a “1” to Institution.
Click “OK”.
Now we see INSTITUTION in the first position.
Run the query. Note we have the CLASS NBR, but this is not useful information about the class. We need to add a record to get useful class information.
Get the exact name of the field. It is CLASS_NBR.
Find the appropriate record.
These are all the records *that you have access to* that contain this field. Select “Join Record” for the CLASS_TBL record.
Discuss join types.
In this case, the suggested Auto Join Criteria are wrong. The CLASS_TBL lists information about classes, not students or employees. The EMPLID in CLASS_TBL refers to something like the person who entered the class information, and should not be used to get student information. Therefore, we uncheck that part of the join criteria.

In addition, the ACAD_CAREER of the student may not be the ACAD_CAREER of the course. Therefore, for this purpose, this link is also invalid.
Most of the time, the Auto Join Criteria are correct. However, each developer is responsible for getting the correct joins.
Now we see both records on the Query tab and we can choose fields from CLASS_TBL.
Add SUBJECT, CATALOG_NBR, and DESCR to the query.
Now we would like to add the student’s name. In this case, I know the record I want is NAMES.
Find the NAMES record.
Choose NAMES – Join Record.
I need to get the name to match the EMPLID on the STDNT_ENRL record.
Once again, I am shown the linking that PS Query suggests. I click Add Criteria.
An effective date criteria message is displayed. We will investigate that in a moment.
This brings us to the Query tab. We choose the Name field.
Here are the results with the student’s name.

Now let’s go back and look at the effective date criteria referred to in the message.
Edit the EFFDT criterion.
This automatically added criterion adds code to the SQL to get the person’s most current name record. It gets the latest record up to the day the query is run. It does not choose any postdated (future) record.

You can change the criteria to get the latest or earliest record as of the date you choose.
Additional security code is automatically added when you use certain records. The NAMES record is one that includes this code. This is called a SECURITY JOIN and it is attached to records with sensitive data. It forces the code to check whether the person running the query has rights to the data. The OPRID is not saved with the query – it changes based on who is running the query.
When we go to the main page, our query is not listed. We can add it to our Favorites.
Search for the query.
The query is in the resulting list.
Check the Select box to the left and choose Add to Favorites from the dropdown choices. Choose Go.
The query is added to my Favorites, which I have sorted in alphabetic order.
The link to CUNYfirst reporting instances information.

http://www.cuny.edu/about/administration/offices/CIS/CUNYfirst/reporting.html