Enterprise Reporting Query Studio

Welcome to Query Studio! This course introduces the Enterprise Reporting Query Studio tool. We will begin with a brief overview of the Data Warehouse and then take a closer look at the various data packages. After building a familiarity with the Query Studio interface, we will complete exercises to introduce and reinforce your query-building skills.

This guide was created with the efforts and support of many others. We would like to acknowledge the assistance of various myUFL users and Enterprise Systems team members for their helpful contributions. *Thank you.*

Instructional Objectives

At the end of this course, you should be able to:

- Describe the advantages of Query Studio and the Data Warehouse.

- Demonstrate basics skills in Query Studio:
    - Identify interface elements
    - Assemble a query using filters and other features
    - Save a query for later use
    - Export query data to another format such as PDF, Excel, csv, etc.

- Build a report to serve your unit's needs (FI, HR, Sponsored Research, and/or Student Financials):
    - Describe the organization of data in the data packages
    - Use the Data Elements Guide to plan your query approach
    - Build, run, and save the report

- Describe the steps for sharing a query to the Shared Folders section of Enterprise Reporting

- Recognize how to gain security access to Query Studio

- Leverage helpful resources to continue your learning:
    - Reporting Services Staff
    - Reporting Services Workshops
    - myUFL Toolkits
    - Online reporting courses

The Big Picture

Enterprise Reporting Data Warehouse and Query Studio

Query Studio is an ad-hoc querying tool in Enterprise Reporting that allows you to ask a question of (i.e., query) the Data Warehouse. The Data Warehouse is a separate database that stores all PeopleSoft transactional data in a model that facilitates reporting and querying activities. It is dedicated to running reports and ad-hoc queries University users need so there is no impact on day-to-day operations such as hiring, requisitioning supplies, etc.

A key difference between the Data Warehouse and PeopleSoft's databases is the frequency with which the information is updated. With PeopleSoft being a live, transactional system, its databases are updated continuously. However, because the Data Warehouse is loaded with data from the PeopleSoft databases (a process involving the transfer of millions of rows of data) its information lags. The warehouse is updated overnight.

Though the information in the Data Warehouse may lag behind that of the PeopleSoft databases, the Data Warehouse offers an advantage in that both financials and human resources information coexist in the Data Warehouse environment. This is not true in the PeopleSoft environment where financial information and human resources information are stored in separate databases.

Query Studio also offers other advantages:

- The visual interface requires no programming or knowledge of SQL to build your query

- The fields and tables are named descriptively so you do not need to sort through cryptic names when assembling your query

- Standard table joins have already been performed for you and criteria are easy to define

- Built-in features allow you to enhance the layout of your query report easily

ⓘ You will need the UF_ER_CRN_QUERY_STUDIO security role to access the Query Studio tool.

Please note that the list of data packages you will have access to in Query Studio correlates with the other security roles you have established in myUFL.

The Data Warehouse

Let's take a closer look at the components of myUFL and where Query Studio fits.
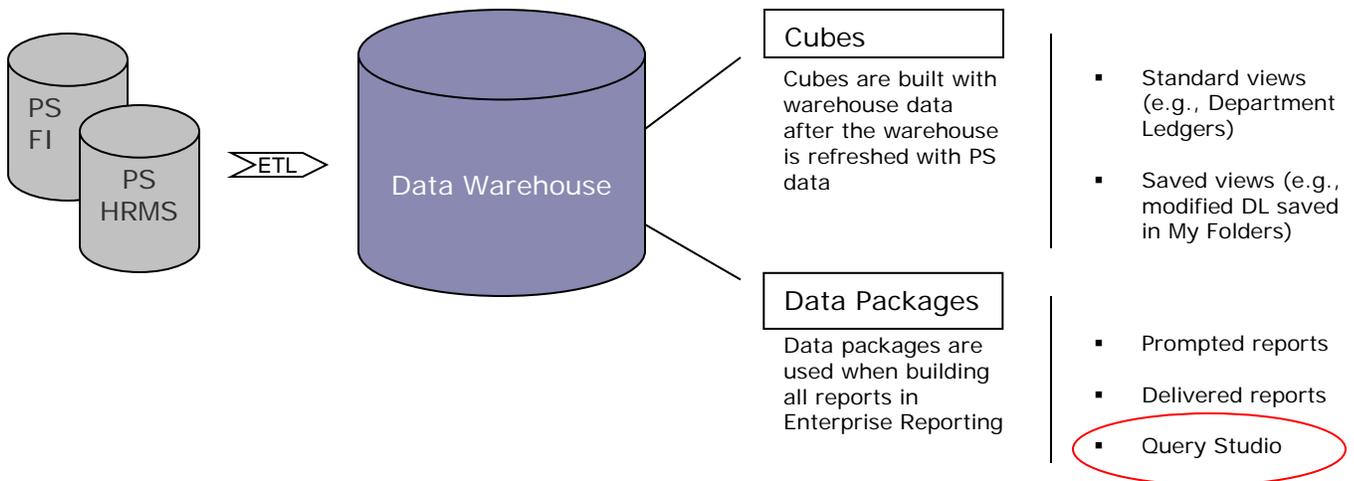
Exercise #1: Getting Familiar with Query Studio

In this exercise, you will receive a quick introduction to Query Studio by navigating straight to a premade query saved in your My Folders area. You will get oriented to a report layout and apply data filters to change what information is displayed.

1. Log into http://my.ufl.edu/ with a GatorLink username and password.
   NOTE: Your instructor will provide you with a special account during class for training purposes.

2. From the myUFL menu, navigate to Enterprise Reporting > Access Reporting.

3. Use the provided Query Studio username and password to access Enterprise Reporting. NOTE: This is only for training purposes. Once you complete training and receive your security role, there will not be an extra authentication when accessing reporting.

4. To use Enterprise Reporting with any version of Internet Explorer beyond version 8, enable Compatibility View by clicking the icon below.

5. Click the My Folders tab.
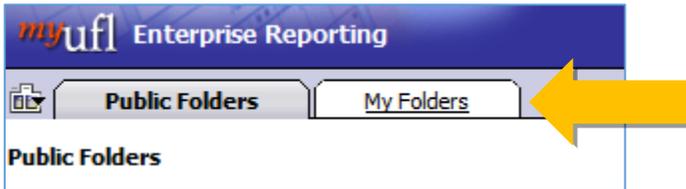
6. Click on Transaction Details by Dept.
   NOTE: This is a premade report that was built using Query Studio. You will have the opportunity to build new reports from scratch later in this training.

7. Click Run Report. (This will give you options for how to run the report.)
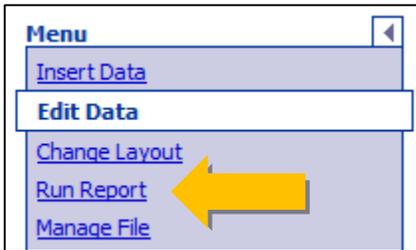
8. Click Preview with No Data. (This will allow you to build/manipulate the structure of the report before populating the report with data.)
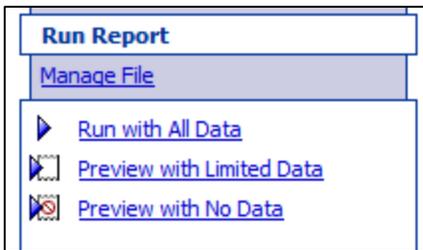
9. Notice the layout of the report.

Notice the filter icon and the items listed next to it. These items, such as current fiscal year and DeptID will filter the information displayed in the report.

Data is turned off

Title

▽ UF-Current Fiscal Year: Y AND UF-Current Acctng Period: Y AND DeptID: 19010000, 19010100, 19010200, 19010300, 19010400, 19010401, 19010410, 19010500, 19010501, 1...

Jrnl Date: Ascending order

DeptID	Transaction Detail	Jrnl Date △	Doc Detail	ID Detail	Encumbrance ID	Journal ID	Journal Date	Sub-System Source	Posted Amount
abcd	abcd	Oct 5, 2015 8:27:48 AM	abcd	abcd	abcd	abcd	Oct 5, 2015 8:27:48 AM	abcd	1,234
abcd	abcd	Oct 5, 2015 8:27:48 AM	abcd	abcd	abcd	abcd	Oct 5, 2015 8:27:48 AM	abcd	1,234
abcd	abcd	Oct 5, 2015 8:27:48 AM	abcd	abcd	abcd	abcd	Oct 5, 2015 8:27:48 AM	abcd	1,234
Summary									**1,234**

Notice the various columns: DeptID, Transaction Detail, etc. Currently this report is not showing any meaningful information because data is turned off. It is a best practice to build the structure of your report first and then run it to display the appropriate data. You will learn how to do this later in this training.

10. Click on the DeptID filter (as seen below).

DeptID: 19010000, 19010100, 19010200, 19010300, 19010400, 19010401, 19010410, 19010500, 19010501, 1...

11. Replace the current DeptID filters with another department. In this example, use 62000000:

- Start by removing the current DeptIDs. Click **Select All** beneath the box displaying the report's current DeptID filters.

Insert →

← Remove

```
19010000
19010100
19010200
19010300
19010400
19010401
19010410
19010500
19010501
```

Select all Deselect all
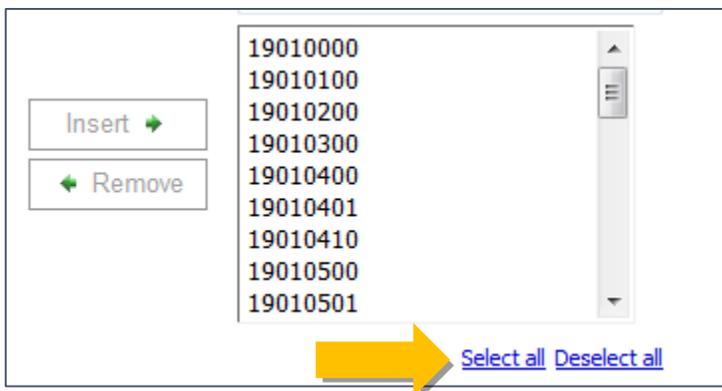
- Then click the **Remove** button.

- Next enter 62 in the **Keywords** search box and click the **Search** button.

Keywords:
Type one or more keywords separated by spaces.

| 62 | Search 🔍 |

- Underneath the **Results** box, click **Select All** and then click the **Insert** button.

- Then click **OK**. Notice that the report now shows the DeptID filter as 62000000, 62010000, etc.

UF-Current Fiscal Year: Y AND UF-Current Acctng Period: Y AND DeptID: 62000000, 62010000, 62010100, 62010101, 62010200,   62010302, 62010400, 6...

Jrnl Date: Ascending order

DeptID	Transaction Detail	Jrnl Date △	Doc Detail	ID Detail	Encumbrance ID	Journal ID	Journal Date	Sub-System Source	Posted Amount
abcd	abcd	Oct 5, 2015 8:51:10 AM	abcd	abcd	abcd	abcd	Oct 5, 2015 8:51:10 AM	abcd	1,234
abcd	abcd	Oct 5, 2015 8:51:10 AM	abcd	abcd	abcd	abcd	Oct 5, 2015 8:51:10 AM	abcd	1,234
abcd	abcd	Oct 5, 2015 8:51:10 AM	abcd	abcd	abcd	abcd	Oct 5, 2015 8:51:10 AM	abcd	1,234
Summary									**1,234**

12. Click the **Run** button to display data in the report.

| Font | ▼ | Size | ▼ | A▼ | B | I | U | 🎨▼ |

13. Repeat the steps 10-12, but change the DeptID filter to be your own department.

14. Click the **Return** button (⬑) to return to the Enterprise Reporting home page.

From the Beginning:
Navigating to Query Studio and Building a Report

Navigating to Query Studio

1. Log into http://my.ufl.edu/ with your GatorLink username and password.

2. From the myUFL menu navigate to Enterprise Reporting > Access Reporting.

   Please note for training purposes, a second authentication window will appear during the training session that does not appear in production use. You will be given a student account to log in with at this second login screen.
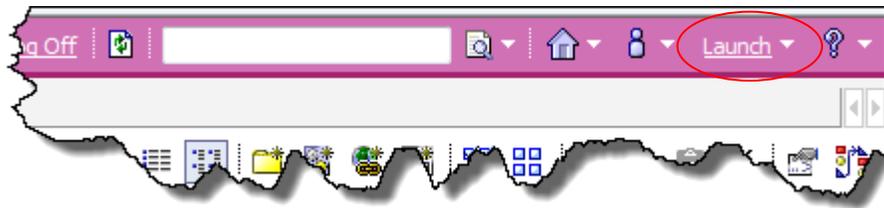
3. Click the Launch > Query Studio link in the upper right corner.

   The list of Query Studio packages appears.

   ⚠ Avoid using browser buttons when working in Enterprise Reporting.

Selecting a Query Studio Package

Before launching the Query Studio interface you must select a data package. A data package combines data from related tables and is the highest organization of information in the Data Warehouse. You can only work in one data package at a time. Click a data package link to begin working in that package.

A short list of recently used packages will appear at the top.

Please note, the following packages may or may not be available to you based on your security.
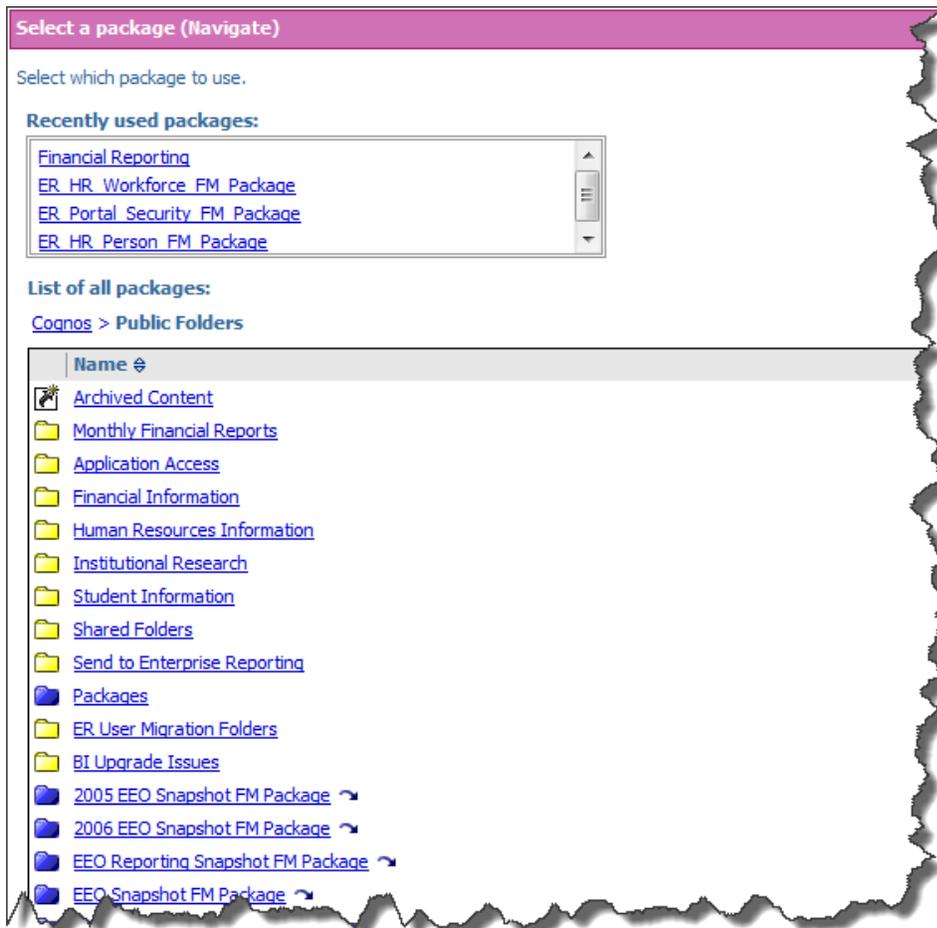
Query Studio Interface Overview
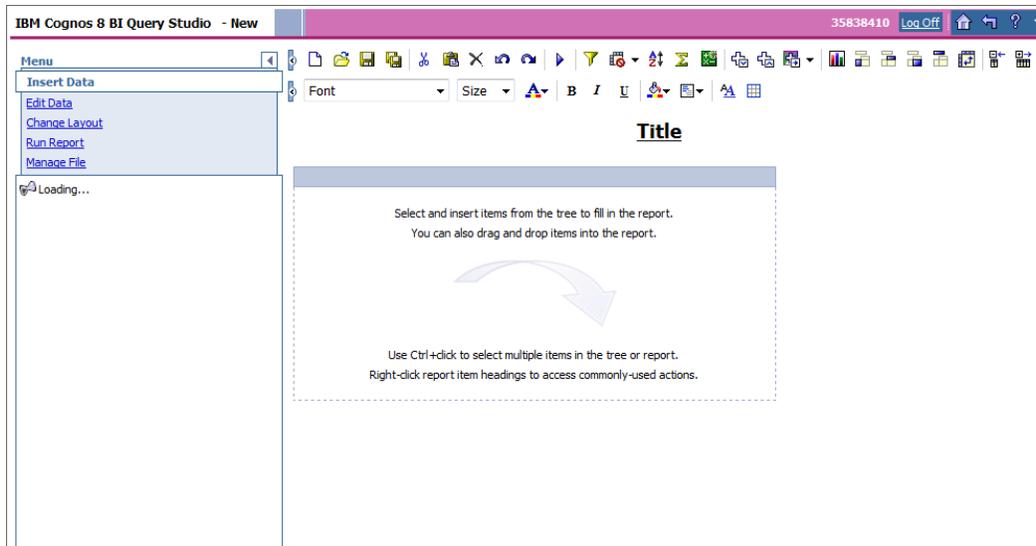
The Main Menu

The menu contains all the functions available from the shortcut buttons toolbar plus more. Based on the menu item you have selected, you will see varying options in the lower half of the menu area.

Insert Data

This menu allows you to select data from the package.
The package holds all the query subjects (tables) available for reporting. Click on a folder or query subject to expand its contents and view the available query items. Query items are fields containing data you can add to your query report. They also can be measures or facts that hold quantitative data.

- Package - A logical collection of data tables
- Query Subject - A single table that holds multiple Query Items
- Query Item - A field in the Query Subject table (UF ID, Last Name, etc.).
- Measure or Fact - Quantitative data such as asset cost or depreciation amount

There are several methods you can use to add a query item to your report:
1. Single-click a query item and click the Insert button
2. Double-click a query item
3. Click and drag a query item
4. Click and drag a query subject to add all of its query items

You also can multi-select query items to insert more than one simultaneously.
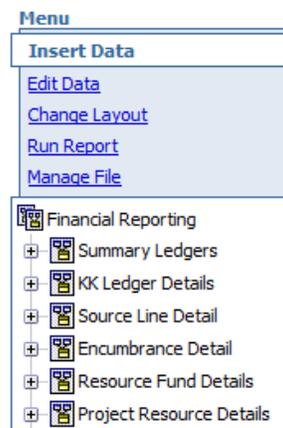
Edit Data

Use the edit data commands to change how query items are displayed. Format commands change the way dates and numerical values appear. The Rename command changes the column header name of the query item, while not affecting the actual data.

Change Layout

These commands allow you to edit the aesthetic properties of the report such as adding graphics and crosstab diagrams, setting the page properties, and organizing data by groups or sections.

Run Report

The Run Report commands include options for processing report with all, limited or no preview data, catering to different resource capacity needs. By default, the "Preview with no data" option is selected. Several output options are available here including PDF, Excel, CSV and XML formats.

Manage File

This menu has options to create and save a report. There is also a report definition link that provides every report item and the details of the expressions for each.

The Toolbar

The toolbar buttons at the top provide a shortcut to commonly used functions. These functions are also found under the menu items on the left.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
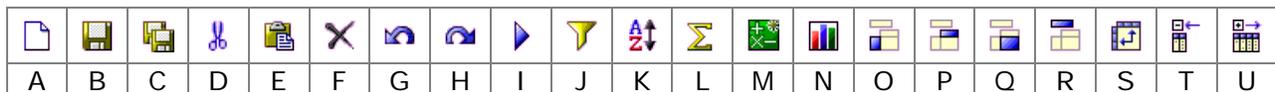
A. **New Report** – Create a New Report in the current Package
B. **Save** – Save the report
C. **Save As** – Save the report with a new name or location
D. **Cut** – Cut the selected entries
E. **Paste** – Paste the clipboard contents to the current location
F. **Delete** – Delete the selected entries permanently from the report
G. **Undo –** Undo previous action
H. **Redo -** Redo previously undone action
I. **Run with All Data -** Run the report using the full data source
J. **Filter -** Add filtering criteria to query item
K. **Sort -** Sort column by data appropriate criteria
L. **Summarize –** Aggregate function such as Count, Min, Max, Total, and Average
M. **Calculate –** Apply a mathematical operation to query item(s)
N. **Chart –** Insert a chart
O. **Group –** Allows grouping of similar information
P. **Pivot –** Create a crosstab report with columns and rows
Q. **Ungroup –** Undo previous Group function
R. **Create Sections –** Show the value of a report item as the heading of a section
S. **Swap Rows and Columns –** Inverse layout of crosstab information
T. **Collapse Group -** Minimize detailed information of a group
U. **Expand Group -** Display detailed information of a collapsed group

Creating Reports

In this section we will create several query reports to demonstrate various features of Query Studio and explore the more commonly used data packages.

Exercises are grouped into three levels.

- **Level One** exercises are step-by-step exercises you will perform with the instructor in class and independently in class.

- **Level Two** exercises are step-by-step exercises you will perform independently in class.

- **Challenge** or level three exercises are scenario-based exercises you will perform independently in class.

- **Ultimate Challenge** or the level four exercise is for you to decide what you want to appear in the report. It is designed to be done in class, or independently back at your desk.

This training guide contains the following exercises:

Level 1
- Create an Employees by Status and Department Report
- Create a list of Active Projects by PIs

Level 2
- Create a report for PCard Transaction over $1,000.00

Level 3
- Create a Citizenship Report
- Create a Tenure Status Report

Level 4
- Ultimate Challenge

Please note that these exercises provide instruction on building simplified reports for demonstration purposes only. However, your ad-hoc querying efforts should not replicate standard reports that already exist in the system.

Exercise 2: (Level 1)
Create an Employee by Status and Dept Report

Scenario: Matthias would like you to generate a list of all employees in Enterprise Systems (p.k.a. Bridges) by their employment status. You will set up a query listing employees and define prompts for the Department.

Add Data

1. Once you have logged into Enterprise Reporting, click the Launch > Query Studio link.

2. Click the ER_HR_Workforce_FM_Package link to open Query Studio and the package.

   a. If you have recently used this package it will appear in the Recently Used box at the top of the page.

   b. If you have not recently used this package, you will need to navigate to it by clicking on the page navigation. Go to page 2 and you will find it there. Subsequently, it will appear in your Recently Used box.

3. Click ⊞ to expand the **Job Information** folder.

4. Click ⊞ to expand the **Job Fact** table.

5. Select these fields:
   a. Double-click **Employee ID**
   b. Double-click **Job Fact Current Flag**
   c. Double-click **Department**
   d. Double-click **Department Code**

6. Click ⊟ to collapse the **Job Fact** table.

7. Click ⊞ to expand the **Job Employee Status** table.

8. Double-click **Job Employee Status** query item (within the table).

9. Click ⊟ to collapse the **Job Employee Status** table.

10. Click ⊞ to expand the **Job Person Names** table.

11. Select these fields:
    a. Double-click **Name**
    b. Double-click **Name Type Code**

12. Click ⊟ to collapse the **Job Person Names** table.

Set filters to minimize the results

1. Select the **Name Type Code** column heading.

2. Click ▼ to set a filter on this column.

3. Click the **Pick Values from a List** link.

4. A list of valid values for this field will appear. Select **PRI** (Primary) checkbox from the list.

5. Click **OK**.

6. Click the **Job Fact Current Flag** heading to select the column.

7. Click to set a filter on this column.

8. A list of valid values for this field will appear. Select **Y** checkbox from the list.

9. Click **OK** twice.

10. Now we will set a prompt for the report. Click the **Department Code** heading.

11. Click to set a filter on this column.

12. Click the **Search for values** link.

13. Type in **14** in the search field to search for department codes beginning with 14.

14. Click .

15. Click the **Select all link** to select all values it has found.

16. Click to add those values to your filter.

17. Click **OK** twice.

Grouping and Formatting

1. Click the **Job Employee Status** heading to select the column.

2. Click to group by this column and remove any redundant values.

3. Click the **Title** of the report to edit it.

4. Enter **Employee List by Status** in the Title field.

5. Uncheck each of the boxes.

6. Click **OK**.

7. Select the **Department Code** and **Department** column headings.

8. Click the ▭ to **Create a Section**.

9. Now click ▶ to run your report.

10. Now click the **Run Report** link in the menu to view the report in a PDF format.

11. Click the **View in PDF Format** link.

12. Close the tab when you are finished reviewing the report.

13. Click 🖫 to save your report.
    a. Enter a name for your report in the **Name** field.
    b. If necessary, click the **Select another location**… link to select your destination.
    c. Click the **My Folder** link at the top of the page to select this destination.
    d. Click **OK** to set this location.
    e. Click **OK** again to save your report.

Now let's remove the filtered columns to improve the readability of our report.

14. Click the **Job Fact Current Flag** heading to select the column.

15. Click ✕ to delete the column.

16. When prompted about deleting the filter, **uncheck the box** and click **OK**.

17. Click the **Name Type Code** heading to select the column.

18. Click ✕ to delete the column.

19. When prompted about deleting the filter, **uncheck the box** and click **OK**.

20. Click 🖫 to save your report.

A Step Further…

1. Highlight **Department Code** and **Department**.

2. Click the **Calculation** button. 📊

3. Select **Concatenation** from the **Operation** dropdown list.
   NOTE: Concatenation means to combine two strings of information. In this example, we'll combine the headers and data of two columns.

4. Enter a hyphen (-) in the **Separator between report items** field.

5. Click the **Insert** button.

6. Delete the **Department Code** (remember, **do not delete the filter**).

7. Delete the **Department**.

8. Highlight **Department Code - Department** column heading.

9. Click the to create a section.

10. Click to save your report.

11. Click the **Return** button () to return to the Enterprise Reporting home page.

Exercise 3: (Level 1)
Create a list of Active Projects by PIs

Penelope is the senior grants manager for her college and needs a list of all PIs and their active grants. Create a query that meets her needs with a filter on the department.

1. Click the <u>Launch</u> link and then the <u>Query Studio</u> link in the upper right corner.

2. Click the <u>Financial Reporting</u> link to launch Query Studio and open the package.

   a. If you have recently used this package it will appear in the Recently Used box at the top of the page.

   b. If you have not recently used this package, you will need to navigate to it by navigating to Packages > Finance > Financial Reporting. Subsequently, it will appear in your Recently Used box.

3. Click the Run Report > **Preview with No Data** link

4. Click Insert Data.

5. Click the ⊞ to expand the **Summary Ledgers** table

6. Click the ⊞ to expand the **Other** folder

7. Click the ⊞ to expand the **Grants Mgmnt Projects** query subject
   a. Insert **Project Code~Descr** query object
   b. Right click **Effective Status** query object
   c. Click the **Filter for Report** link
   d. Filter on **A** for Active

8. Click the ⊞ to expand the **Grants Mgmnt Awards** query subject
   a. Insert **PI Name** query object
   b. Insert **Begin Date** query object
   c. Insert **End Date** query object

9. Click the ⊟ to close the **Grants Mgmnt Awards** query subject

10. Click the ⊟ to close the **Other** folder

11. Click the ⊞ to open the **Chartfields** folder

12. Click the ⊞ to open the **Dept ID ChartField** query subject
   a. Right click on **the DeptID** query object
   b. Click the **Filter for Report** link
   c. Search for and select DeptID **16040100**
   d. Click the **Ok** button, twice

13. Click the ⊟ to close the **Dept ID ChartField** query subject

14. Click the ⊟ to close the **Chartfields** folder

15. Click the **PI Name** column heading

16. Group the **PI Name** by clicking the **Group** icon

17. Click the **Title**
    a. Enter **Active Projects by PI** in the title field
    b. Remove the check marks for **Show filters**
    c. Remove the check marks for **Show sorts**
    d. Remove the check marks for **Show suppression**

18. Click the **Ok** button

19. Click the **Run** button

20. Click the **Run Report** menu option

21. Select **Preview with No Data**

22. Click the **Save** as icon
    a. Save as **Active Projects by PI**
    b. Your location should be **My Folders**
    c. Click the **OK** button

A Step Further – Add Employee ID/Employee Name to your query and filter by date

1. Group by **Project Code~Descr** by clicking the Group icon

2. Click the ⊞ to open the **ChartField** folder

3. Click the ⊞ to open the **Employee ID Chartfield** query subject
    a. Insert the **EmpIID~Employee Name** query item

4. Click the ⊟ to close the **Employee ID Chartfield** query subject

5. Click the ⊟ to close the **Chartfields** folder

6. Click on the **End Date** column

7. Click to set a filter on this column

8. Use the calendar to enter June 30, 2014 into the **From** field

9. Click **OK** twice

10. Click the **Run** button

11. Click the **Run Report** menu option

12. Select **Preview with No Data**

13. Click the **Save** icon

Exercise 4: (Level 2)

Create a report for PCard Transactions over $1,000.00

Jane wants to view all PCard expenditures in the current month that exceeds $1,000. She will set up query listing PCard expenditures and define prompts for the date range.

1. Click the <u>Launch</u> link and then the <u>Query Studio</u> link in the upper right corner.

2. Click the <u>Financial Reporting</u> link to launch Query Studio and open the package.

3. Click the Run Report > Preview with No Data link.

4. Open **PCard Transaction Details**.

5. Open **Chartfields** folder and make the following selections:
   a. Filter on **DeptID~Desc** for **16%** (% symbol indicates all DeptIDs beginning with 16)

6. From the PCard Transaction Line Distribution query subject, select:
   a. **Cardholder UFID**
   b. **Cardholder Name**
   c. **Transaction Date**
   d. **Transaction Number**

7. Group by the Transaction Date field and set the filter to **Prompt every time the report runs**.

8. From the **Account Chartfield** folder, select the **Account Code~Descr**.

9. **PCard Transaction Line Distribution**, select **Quantity** and **Merchandise Amount**.

10. Select the **Quantity** and **Merchandise Amount** headings and create a calculation to multiply them.

11. Delete the **Quantity** field and the **Merchandise Amount** field.

12. Filter so you only get transactions equal to or greater than $1,000.00.

13. Select the **Cardholder UFID** and **Cardholder Name**. Group them.

14. Name the query **PCard Transactions > $1000.00**.

15. Hide the **Filters**, **Sorts** and **Suppression**.

16. Select **Preview with No Data**.

17. Save the query as **PCard Transactions > $1000.00**.

PCard Transactions > $1000.00

Cardholder UFID	Cardholder Name	Transaction Date	Transaction Number	Account Code~Desc	Quantity * Merchandise Amount
abcd	abcd	Jul 27, 2011 11:55:55 AM	abcd	abcd	1,234
		Jul 27, 2011 11:55:55 AM	abcd	abcd	1,234
		Jul 27, 2011 11:55:55 AM	abcd	abcd	1,234
	abcd				**1,234**
	abcd	Jul 27, 2011 11:55:55 AM	abcd	abcd	1,234
		Jul 27, 2011 11:55:55 AM	abcd	abcd	1,234
		Jul 27, 2011 11:55:55 AM	abcd	abcd	1,234
	abcd				**1,234**
abcd					**1,234**
abcd	abcd	Jul 27, 2011 11:55:55 AM	abcd	abcd	1,234
		Jul 27, 2011 11:55:55 AM	abcd	abcd	1,234
		Jul 27, 2011 11:55:55 AM	abcd	abcd	1,234
	abcd				**1,234**
	abcd	Jul 27, 2011 11:55:55 AM	abcd	abcd	1,234

Exercise 5: (Level 3)
Create a Citizenship Report

Janet would like you to create a report listing all employees in her department and their current citizenship classification and VISA type and expiration date.

Key information

- Data Package: ER HR Workforce FM Package
- Query Subjects: Citizen, Names, and Job Fact, Job Employee Status, VISA Permit Information
- Query Items: Department Code, Employee ID, Job Fact Current Flag, Name, Citizenship Status, Visa Permit Type, and Visa Expiration Date
- Filter on: Department Code (16%), Job Fact Current Flag (Y), Job Employee Status (Active), VISA select all, and "Leave out missing values"
- Section by: Department Code
- Group by: Citizenship Status,
- Concatenate: Employee ID and Name
    - Name the Concatenated field: Employee ID ~ Name
    - Delete: Employee ID Delete Name
    - Group by Employee ID ~ Name

Report Item	Expression
Department Code	[ERModel].[Job Fact].[Department Code]
Citizenship Status	[ERModel].[Citizen].[Citizenship Status]
Employee ID	[ERModel].[Names].[Employee ID]
Name	[ERModel].[Names].[Name]
VISA Permit Type	[ERModel].[Visa Permit Information].[VISA Permit Type]
Expiration Date	[ERModel].[Visa Permit Information].[Expiration Date]
Job Fact Current Flag	[ERModel].[Job Fact].[Job Fact Current Flag]
Job Employee Status	[ERModel].[Job Employee Status].[Job Employee Status]

Exercise 5: Citizenship Report

Department Code: 16010000, 16010100, 16010300, 16010500, 16010700, 16020000, 16020100, 16040000, 16... AND Job Fact Current Flag: Y AND Job Employee Status: Active

VISA Permit Type: no missing values

Department Code: abcd

Citizenship Status	Employee ID ~ Name	VISA Permit Type	Expiration Date
abcd	abcd	abcd	Jul 27, 2011
		abcd	Jul 27, 2011
		abcd	Jul 27, 2011
	abcd	abcd	Jul 27, 2011
		abcd	Jul 27, 2011
		abcd	Jul 27, 2011
abcd	abcd	abcd	Jul 27, 2011
		abcd	Jul 27, 2011

Exercise 6: (Level 3)
Create a Tenure Status Report

Niles would like to create a report listing all employees in his department and their current tenure status.

Key information

- Data Package: ER HR Person FM Package

- Query Subjects: Tenure and Names

- Query Items: Tenure Home Organization, Employee ID, Tenure Track Start Date, Tenure Status Code, Tenure Status, Rank Change Date, Mandatory Review Date, Tenure Granted Date, and Name

- Filter on: Tenure Home Organization (56%)

- Section by: Tenure Home Organization

- Order: Name (Ascending)

- Concatenate: Employee ID and Name

  - Name the Concatenated field: Employee ID ~ Name
  - Delete: Employee ID
  - Delete: Name, keep the ascending order
  - Group by Employee ID ~ Name

Report Item	Expression
Tenure Home Organization	[ERModel].[Tenure].[Tenure Home Organization]
Name	[ERModel].[Names].[Name]
Employee ID ~ Name	([ERModel].[Tenure].[Employee ID]) || COALESCE((' ~ ' || ([ERModel].[Names].[Name])), ' ~ ')
Tenure Track Start Date	[ERModel].[Tenure].[Tenure Track Start Date]
Tenure Status Code	[ERModel].[Tenure].[Tenure Status Code]
Tenure Status	[ERModel].[Tenure].[Tenure Status]
Rank Change Date	[ERModel].[Tenure].[Rank Change Date]
Mandatory Review Date	[ERModel].[Tenure].[Mandatory Review Date]
Tenure Granted Date	[ERModel].[Tenure].[Tenure Granted Date]
Name Type Code	[ERModel].[Names].[Name Type Code]

Exercise 6 - Tenure Status Report

Name Type Code: PRI AND Tenure Home Organization: 56020000, 56021300, 56022400

Name: Ascending order

Tenure Home Organization: abcd

Employee ID ~ Name	Tenure Track Start Date	Tenure Status Code	Tenure Status	Rank Change Date	Mandatory Review Date	Tenure Granted Date
abcd	Jul 27, 2011	abcd	abcd	Jul 27, 2011	Jul 27, 2011	Jul 27, 2011
abcd	Jul 27, 2011	abcd	abcd	Jul 27, 2011	Jul 27, 2011	Jul 27, 2011
abcd	Jul 27, 2011	abcd	abcd	Jul 27, 2011	Jul 27, 2011	Jul 27, 2011

Exercise 7: (Level 4)
THE ULTIMATE CHALLENGE

Come up with your own question and build a report in Query Studio that can provide you with the answer(s) you need.

1. Use the provided Query Studio Data Element Guide to identify where to find the appropriate query subjects and query items

2. Plan out your approach using the provided Query Studio Planning Sheet

3. Build and run your report in Query Studio

Query Studio Tips and Tricks

Types and Type Codes

- For example: Addresses
- Filter for the one want, or you get all of them

Address Type	Address Type Code
Business	BUSN
Home	HOME
Mailing	MAIL
Physical	PHYS
Work	WORK

- This applies to HR only

Current Flags

- Indicates "Current" condition
  - Addresses
  - How many times have you moved?
  - Do you want history, or only CURRENT?
- Filter for the one want, or you get all of them
- This applies to HR only

A Few "Heads Up" Items

- Wildcard #s
  - Example: Department 56%
- Selecting dates (radio buttons)
- Turning on and off the data to save processing time

Make sure to click OK when you see the following message:

> ⚠ A more recent package exists. To access the report in Query Studio, you must update to the latest package.
>
> After the report has been updated, you must save it to complete the update. As a precaution, you can keep the original report unchanged by saving this report with another name.
>
> Do you want to update?
>
> [OK]   [Cancel]
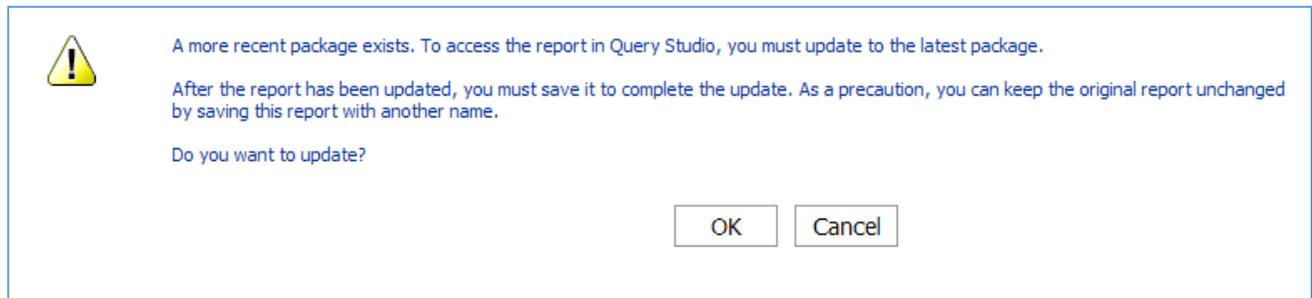
The Best Experience

- Internet Explorer with Compatibility Mode turned on

- Remember to log out of Enterprise Reporting rather than simply closing the browser window
    – This insures that there are no processes left running from your session

- For more detailed instructions on IE Compatibility Mode, visit the UF Help Desk Wiki page: http://tinyurl.com/iecompmode.

Query Studio Resources

Getting access
Upon completion of training, please request the Query Studio security role from your Department Security Administrator (DSA). Your completion of training will be verified automatically and you will be added to the Query Studio Listserv.

UF_ER_CRN_Query Studio

Query Studio Listserv
The Query Studio listserv is available to you once you have been assigned the Query Studio role. It provides relevant messages from Enterprise Systems and allows you to share tips with other Query Studio users.

ER-QUERY@LISTS.UFL.EDU

Shared Folders

- Collaboration area for Query Studio users
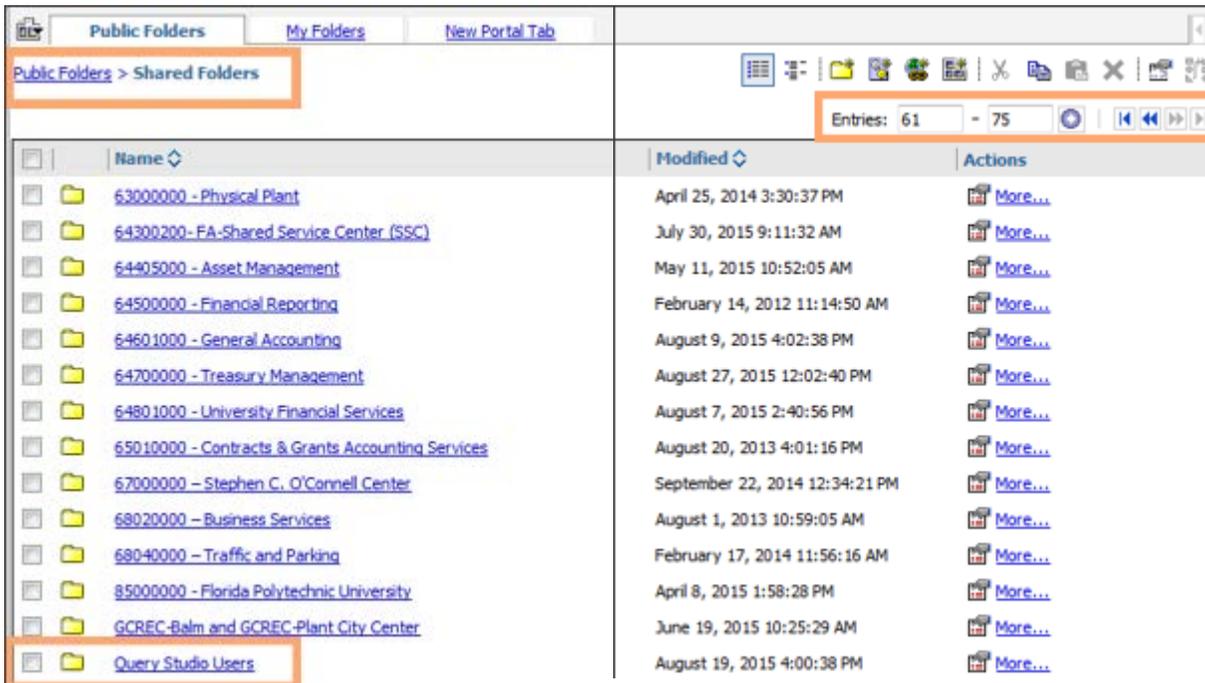
myUFL Toolkits

- Web Simulations
- Instruction Guides
- Security Roles
- Training
- Contact Information
- Other Helpful Information

http://hr.ufl.edu/learn-grow/just-in-time-training/myufl-toolkits

Help – Reporting Services

- Not finding the data you need?
- Having trouble?
- Reporting Services can help!
- reporting-services@ufl.edu

Fran Fiorello
Application
Developer
Analyst

Karen Brake
Finance and
HR IT
Solutions
Analyst

UF Computing Help Desk

- 392-HELP or helpdesk@ufl.edu
- Include details:
    - Browser Information
    - Navigation
    - Error Messages
    - Expected Results
- Include your UFID and/or GatorLink username

Summary

Congratulations, you have reached the end of the course!

At this time, you should now be able to:

- Describe the advantages of Query Studio and the Data Warehouse.

- Demonstrate basics skills in Query Studio:
  - Identify interface elements
  - Assemble a query using filters and other features
  - Save a query for later use
  - Export query data to another format such as PDF, Excel, csv, etc.

- Build a report to serve your unit's needs (FI, HR, Sponsored Research, and/or Student Financials):
  - Describe the organization of data in the data packages
  - Use the Data Elements Guide to plan your query approach
  - Build, run, and save the report

- Describe the steps for sharing a query to the Shared Folders section of Enterprise Reporting

- Recognize how to gain security access to Query Studio

- Leverage helpful resources to continue your learning:
  - Reporting Services Staff
  - Reporting Services Workshops
  - myUFL Toolkits
  - Online reporting courses

Appendix: Data Source Icons

Each object in the data source has a representative icon. You can insert all of the following objects in a report, except for packages and dimensions.

Icon	Object
	Package, which contains the objects you can insert in a report.
	Namespace, used to organize objects.
	Query subject, which represents a table in the database.
	In relational data sources, query item, which represents a column of qualitative data in the database, such as product name or country. In dimensional data sources, level attribute, which represents a property of a level.
	A member is a unique item within a hierarchy. For example, Camping Equipment and 4 Man tent are members of the Products Hierarchy.
	Dimension, which represents a broad grouping of descriptive data about a major aspect of a business, such as products, dates, or markets.
	Hierarchy, which represents a collection of dimensional members organized into a tree structure.
	Level, which is a set of members that have common attributes. For example, a geographical dimension might contain levels for country, region, and city. Multiple levels can exist within a level hierarchy, beginning with the root level. The root level is the parent and rollup of all members in the first level. It is used to obtain a rollup of all values across the hierarchy and to provide a convenient point to start drilling.
	Measure or fact, a query item that represents a column of quantitative data in the database, such as revenue or quantity.
	Measures folder, which contains hierarchical measures.
	Model filter.
	Folder, used to organize data items. You cannot import a folder into your report.