

The Power is in Their Hands: Facilitating Data Usage Throughout the Institution

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Southern Association for Institutional Research (SAIR)
Louisville, Kentucky
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Welcome to the Powerhouse.

UNIVERSITYof **HOUSTON**

Outline

- Introductions
- What are Reporting Tables?
- Reporting Tables Schema
- Description of Tables
- Query Training Overview
- Demonstration

University of Houston

- Flagship of the University of Houston System
- 16 colleges
- 114 bachelors, 111 masters, 47 doctoral, and 4 professional programs
- 47,031 students
- 11,544 degrees awarded annually



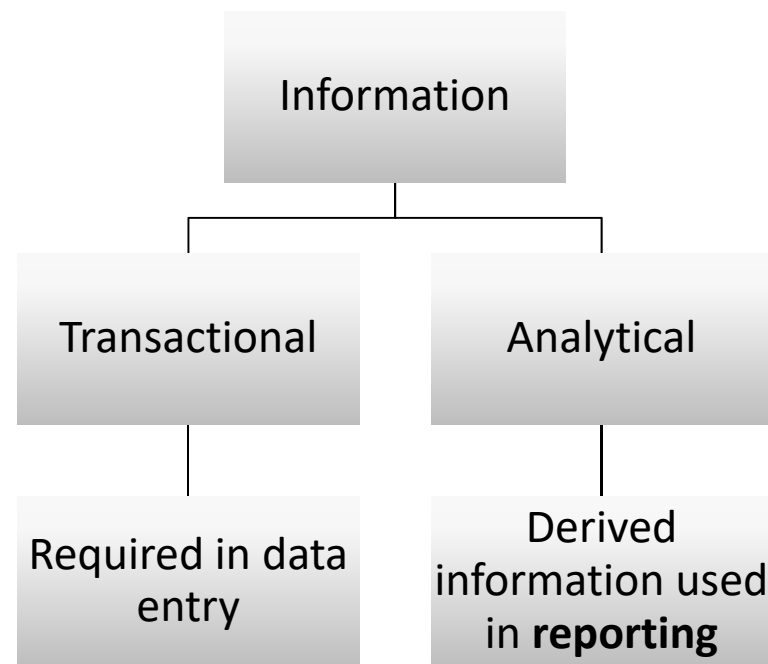
Institutional Research

- www.uh.edu/ir
- 5 staff members
- 2 research assistants



Transactional vs. Reporting Systems

Transactional System	Reporting System
Designed to run your business	Designed to manage your business
Modeled for data entry	Modeled for data analysis and dissemination
Data is constantly changing	Data reflects snapshots/points in time



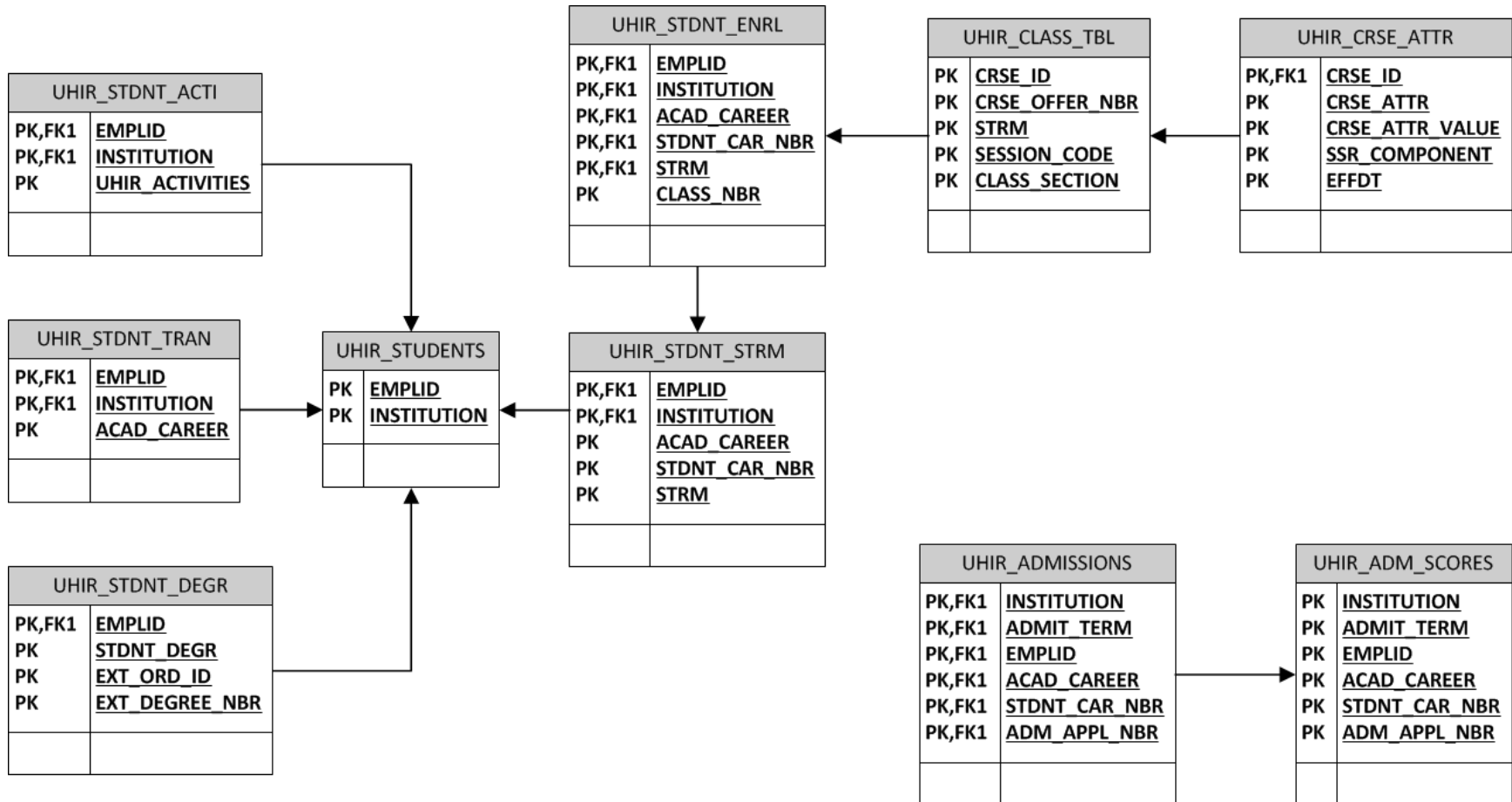
The Need for Reporting Tables

- Data access before PeopleSoft...
 - Data dump
 - No query ability
 - Little flexibility in terms of fields included
- Data access after PeopleSoft...
 - Opportunity to change how we make data available
 - Consolidate data from many tables into about a dozen tables
 - Facilitate development of queries

Reporting Table Logistics

- Refreshed daily overnight
- Roughly three hours to load
- Table purged and reloaded for the term being processed
- Key fields aid in query building

Reporting Tables Schema



Tables & Descriptions

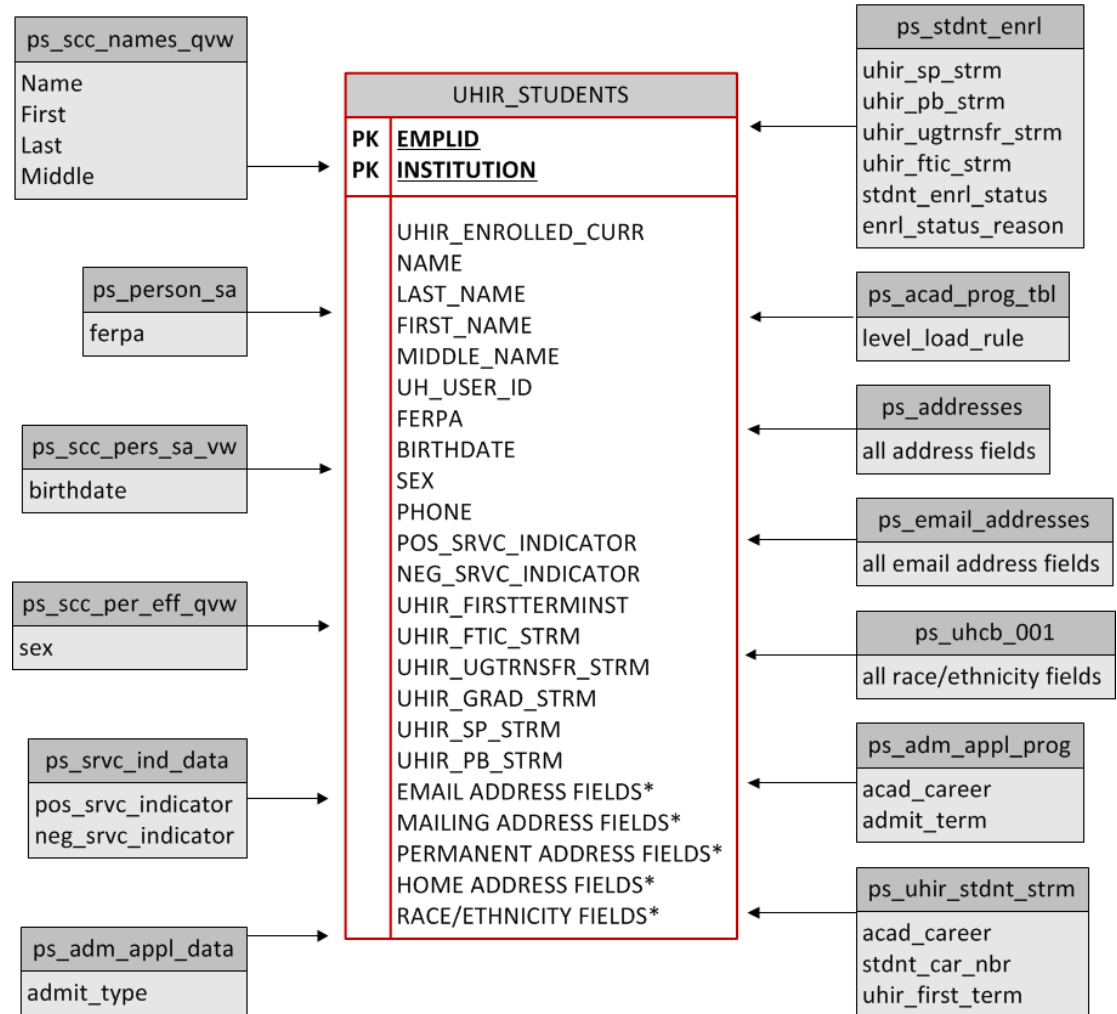
Table Name	Description
UHIR_STUDENTS	Current demographic information for students. One record per student, per institution.
UHIR_STDNT_STRM	Term-specific information for students that have been enrolled in at least one class for that term.
UHIR_STDNT_ENRL	Class enrollment data by term.
UHIR_STDNT_DEGR	Degree information.
UHIR_STDNT_TRAN	Transfer information.
UHIR_STDNT_ACTI	Combination of student attributes, extra-curricular, student activity and student group data.
UHIR_CLASS_TBL	Data related to classes offered.
UHIR_ADMISSIONS	Admission application data.
UHIR_ADM_SCORES	Admission test score information.

Tables & Descriptions (cont'd)

Table Name	Description
UHS_STDNT_LOC	Identifies the locations of all of the classes in which a student is enrolled.
UHM_ADM_FTICPOP	Key information about admitted FTICs and where they are in the onboarding process.
UHM_FTIC_COHDAT	Tracks members of FTIC cohorts as they progress through the university.
UHM_UGRD_COHORT	Identifies new undergraduate students each semester; includes FTIC/transfer and degree-seeking status.
UHIR_HOUSING	Student data from the housing system from application to booking.

Source Tables for UHIR_STUDENTS

- 13 source tables
- 64 fields
 - 58 fields pulled
 - 6 derived fields



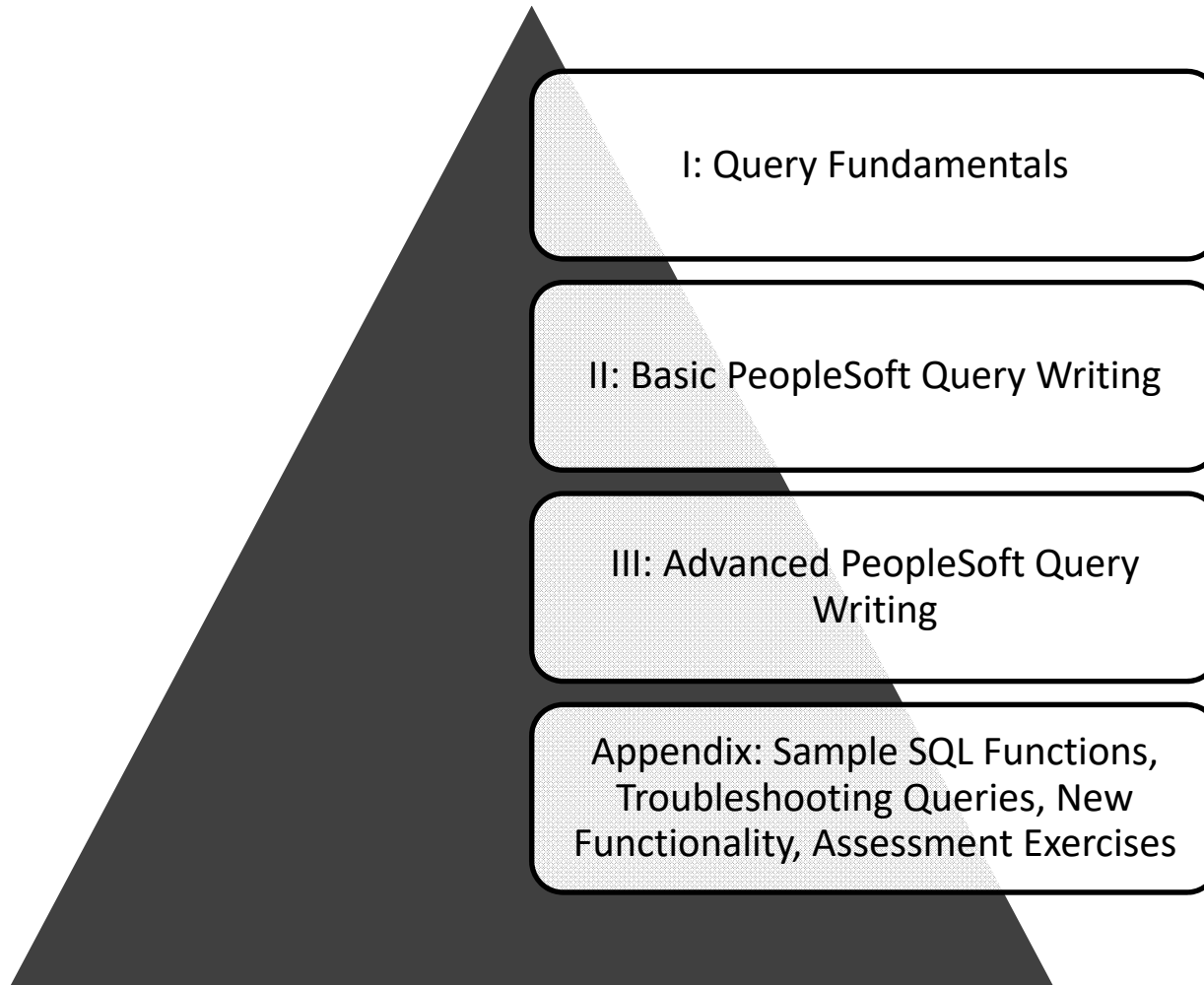
Use of Reporting Tables

- Institutional Research
 - Survey Reporting
 - Data Requests
 - GPA, Hours information
 - Enrolled students contact information
 - Profile of admitted students: Top 10, Test Scores
- Colleges/Departments/Administrative Units
 - Class Enrollment data for students
 - International Applicants: Country/State/City
 - Veteran students, Students with FERPA flag
 - Class Locations of enrolled students

Query Training

- Class Length
 - Fifteen hours
 - 5 consecutive days, 3 hours per day
- Participants
 - Signup for training
 - Users wanting access to be able to write queries in the PeopleSoft student module
- Frequency
 - 3 times a year (spring, summer, fall)
- Uses Training Database
- Partner with Campus Solutions IT

Query Training Outline



Query Training Topics

- Overview of Tables
 - UHIR Reporting Tables
 - Coordinating Board (CB) Report Tables
- Query Writing
 - Effective Date Logic
 - Query Methodology
 - Joins/Functions/Expressions
- Assessment Exercises

Query Training Assessment

- Background
 - Goal: grant access to query production data
 - Needed to ensure that users understood how to accurately query data
- Format
 - 2 exercises; 1 beginner, 1 advanced
- Grading
 - Correct tables/fields
 - Joins, Criteria
 - Output formatting
 - Expressions, functions, aggregation, etc.
 - Expected number of records returned

Example Assessment Exercise

Provide a list that displays the EMPLID and CUM_GPA for all students enrolled at the end of the term during Fall 2009 at UH if the student had a cumulative GPA of at least 3.0. If the student belonged to the Honors (R003) activity type, provide that additional information in a column (UHIR_ACTIVITY_TYPE). Also add a calculated column that combines the student's current Academic Standing code with their primary plan (with a dash in between), i.e. 'E-TELSBS'; the title of the column should be "Standing and Plan". The institution should be a run-time variable that defaults to value '00730', having a lookup against master table 'INSTITUTION_TBL' and having custom heading text that says "Enter the institution". Sort the data by activity type, then by student ID.

Tip: You should receive 18,144 rows of data.

UH PeopleSoft Campus Solutions Security Form

Campus Solutions System Security Access Request Form

Empl ID/ PeopleSoft: <input type="text"/>	Last Name: <input type="text"/>	First Name: <input type="text"/>
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Module Selections Continued

IR Institutional Research, Coordinating Board Reporting, PeopleTools Query

for IR, CB, or Query access, email form to Susan Moreno and Vyas Krishnamurthy

- CB/IR Report View (Staff must have access to view full SSNs for this role.)
- CB TSI View
- Data Validation Report Distribution
- DORP Report
- Hazlewood Maintenance View
- Query Access – Create and Run (Completion of SAXXQT training is required. Prerequisite: SAXVWI)
- Query Access – Run Only

Other:

For assistance and Institutional Research access contact : Security Administrator/Business Owner Authorizing

Susan Moreno, smoreno@uh.edu, 713-743-0640
Keisha Lyons, klyons@uh.edu, 713-743-9578
Vyas Krishnamurthy, vkrishn2@central.uh.edu, 713-743-0644

Signature: _____ Date:
Print Name: Susan Moreno, Director, IR

Query Tool Demonstration



Thank you!!

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Query Manager

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Query](#) |
 [Create New Query](#)

*Search By ▾ begins with

Search

[Advanced Search](#)

Search Results

[Check All](#)

[Uncheck All](#)

*Folder View ▾

*Action ▾

[Go](#)

Query

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References
<input type="checkbox"/>	UHIR_09GRADS_FTIC_TRANSFER2	2009 grads cum hours-	Private	UHIR	Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	UHIR_CONTACTLIST_FALL09	Contact info for all students	Private	UHIR	Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	UHIR_CONTACT_ALL_LANDRUM	Open Request- email and phone	Private	UHIR	Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	UHIR_ENROLLED_PASSED_KH	all students	Private	UHIR	Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	UHIR_EVENINGMBAPROGRAM_FALL09	includes ethnicity field	Private	UHIR	Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	UHIR_FALL2010FTIC_FORSIMONBOTT	FTIC students enrolled Fall10	Private	UHIR	Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	UHIR_INCOMINGSTUDENTSFALL09_KH	Legal Counsel Office	Private	UHIR	Edit	HTML	Excel	XML	Schedule	Lookup References

- Records
- Query
- Expressions
- Prompts
- Fields
- Criteria
- Having
- Transformations
- View SQL
- Run

Query Name New Unsaved Query

Description

Feed

*Search By Record Name ▼

begins with

UHIR_ST

Search

[Advanced Search](#)

Search Results

Record

Rename	Add Record	Show Fields
UHIR_STDNT_ACTI - Reporting Table-Stdnt Semester	Add Record	Show Fields
UHIR_STDNT_DEGR - Reporting Table-Student Degree	Add Record	Show Fields
UHIR_STDNT_ENRL - Student Enrollment Table	Add Record	Show Fields
UHIR_STDNT_STRM - Reporting Table-Stdnt Semester	Add Record	Show Fields
UHIR_STDNT_TRAN - Reporting Table-Transfer Data	Add Record	Show Fields
UHIR_STGR_UPDLS - UHIR_STGR_UPDLS	Add Record	Show Fields
UHIR_STUDENTS - Reporting Table-Student Data	Add Record	Show Fields

Save

[Save As](#)

[New Query](#)

[Preferences](#)

[Properties](#)

[Publish as Feed](#)

[Publish as Pivot Grid](#)

[New Union](#)

Return To Search

Fields for record UHIR_STDNT_STRM - Reporting Table-Stdnt Semester:

Fieldname

Key	Description
Y	EMPLID - ID
Y	INSTITUTION - Academic Institution
Y	ACAD_CAREER - Academic Career
Y	STRM - Term
Y	STDNT_CAR_NBR - Student Career Nbr
	UHIR_ENROLL_CENSUS - Enrolled on Census Date
	UHIR_ENROLL_CURR - Currently Enrolled Flag
	UHIR_ENROLL_EOS - Enrolled - End of Semester
	ACAD_LEVEL_BOT - Academic Level - Term Start
	UHIR_ACAD_LEVEL - Acad Level Description
	UHIR_COLLEGE - College
	UHIR_COLLEGE_DESCR - College (Group) Description
	UHIR_PRIMARY_ORG - Primary Plan Org Owner

- Records
- Query**
- Expressions
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- Run

Query Name New Unsaved Query

Description



Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.

Chosen Records

Alias **Record**

A UHIR_STDNT_STRM - Reporting Table-Stdnt Semester

Hierarchy Join

Check All

Uncheck All

Fields



1-50 of 165



View 100

- | | | | |
|--------------------------|---|--|--|
| <input type="checkbox"/> | EMPLID - ID | Join PEOPLE_SRCH - People Search View | |
| <input type="checkbox"/> | INSTITUTION - Academic Institution | | |
| <input type="checkbox"/> | ACAD_CAREER - Academic Career | Join ACAD_CAR_TBL - Academic Career Table | |
| <input type="checkbox"/> | STRM - Term | Join TERM_VAL_TBL - Term Value Table | |
| <input type="checkbox"/> | STDNT_CAR_NBR - Student Career Nbr | | |
| <input type="checkbox"/> | UHIR_ENROLL_CENSUS - Enrolled on Census Date | | |
| <input type="checkbox"/> | UHIR_ENROLL_CURR - Currently Enrolled Flag | | |
| <input type="checkbox"/> | UHIR_ENROLL_EOS - Enrolled - End of Semester | | |
| <input type="checkbox"/> | ACAD_LEVEL_BOT - Academic Level - Term Start | Join ACAD_LEVEL_TBL - Academic Level Table | |
| <input type="checkbox"/> | UHIR_ACAD_LEVEL - Acad Level Description | | |
| <input type="checkbox"/> | UHIR_COLLEGE - College | Join ACAD_GROUP_TBL - Academic Group Table | |
| <input type="checkbox"/> | UHIR_COLLEGE_DESCR - College (Group) Description | | |
| <input type="checkbox"/> | UHIR_PRIMARY_ORG - Primary Plan Org Owner | | |
| <input type="checkbox"/> | PRIMARY_ORG_DESCR - Primary Org Description | | |
| <input type="checkbox"/> | UHIR_ACAD_STANDING - Current Term Academic Standing | | |
| <input type="checkbox"/> | UHIR_ACAD_STNDESC - Current Acad Standing Desc | | |
| <input type="checkbox"/> | UHIR_PRE_ACAD_STD - Pror semester academic stading | | |
| <input type="checkbox"/> | UHIR_P_ACAD_STDESC - Prior Term Acad Stdg Descr | | |

Records Query Expressions Prompts Fields Criteria Having Transformations View SQL Run

Query Name New Unsaved Query

Description

Feed

*Search By Record Name

begins with

UHIR

Search

Advanced Search

Search Results

Record



Recordname	Join Record	Show Fields
UHIR_ADMISSIONS - Custom IR Admissions Rpt Table	Join Record	Show Fields
UHIR_ADM_SCORES - Custom IR Admissions Rpt Table	Join Record	Show Fields
UHIR_AUD1_DATA - Audit Data	Join Record	Show Fields
UHIR_CLASS_TBL - Course Catalog Offerings	Join Record	Show Fields
UHIR_CRSE_ATTR - Course Attribute Tbl	Join Record	Show Fields
UHIR_HOUSING - Housing Database Rptg Table	Join Record	Show Fields
UHIR_PNAME_VW - Primary Name View	Join Record	Show Fields
UHIR_STDNT_ACTI - Reporting Table-Stdnt Semester	Join Record	Show Fields
UHIR_STDNT_DEGR - Reporting Table-Student Degree	Join Record	Show Fields
UHIR_STDNT_ENRL - Student Enrollment Table	Join Record	Show Fields
UHIR_STDNT_STRM - Reporting Table-Stdnt Semester	Join Record	Show Fields
UHIR_STDNT_TRAN - Reporting Table-Transfer Data	Join Record	Show Fields
UHIR_STGR_UPDLS - UHIR_STGR_UPDLS	Join Record	Show Fields
UHIR_STUDENTS - Reporting Table-Student Data	Join Record	Show Fields

Select join type and then record to join with UHIR_STUDENTS - Reporting Table-Student Data.

Join Type

- Join to filter and get additional fields (Standard Join)
- Join to get additional fields only (Left outer join)

Join Record

  |< < 1-1 of 1 v > >|

A = UHIR_STDNT_STRM - Reporting Table-Stdnt Semester

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.

<input checked="" type="checkbox"/>	A.EMPLID - ID = B.EMPLID - Empl ID
<input checked="" type="checkbox"/>	A.INSTITUTION - Academic Institution = B.INSTITUTION - Academic Institution

Add Criteria

Cancel

- Records
- Query**
- Expressions
- Prompts
- Fields
- Criteria
- Having
- Transformations
- View SQL
- Run



Query Name New Unsaved Query

Description

 Feed ▾

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.



Chosen Records		
Alias	Record	
 A	UHIR_STDNT_STRM - Reporting Table-Stdnt Semester	Hierarchy Join —
 B	UHIR_STUDENTS - Reporting Table-Student Data	Hierarchy Join —

Expand All Records

Collapse All Records

Save

Save As

New Query

Preferences

Properties

Publish as Feed

Publish as Pivot Grid

New Union

Return To Search

- Records
- Query
- Expressions
- Prompts
- Fields
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- Having
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- Run

Query Name: New Unsaved Query Description: Feed ▾

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.

Chosen Records

Alias	Record	
	A UHIR_STDNT_STRM - Reporting Table-Stdnt Semester	Hierarchy Join ▾
	B UHIR_STUDENTS - Reporting Table-Student Data	Hierarchy Join ▾

Fields 1-50 of 71 ▾

<input checked="" type="checkbox"/>	EMPLID - Empl ID	Join PEOPLE_SRCH - People Search View	
<input type="checkbox"/>	INSTITUTION - Academic Institution		
<input type="checkbox"/>	UHIR_ENROLL_CURR - Currently Enrolled Flag		
<input type="checkbox"/>	NAME - Name		
<input type="checkbox"/>	LAST_NAME - Last Name		
<input type="checkbox"/>	FIRST_NAME - First Name		
<input type="checkbox"/>	MIDDLE_NAME - Middle Name		
<input type="checkbox"/>	SSN - Social Security #		
<input type="checkbox"/>	UHIR_USER_ID - User ID - U of H - Houston		
<input type="checkbox"/>	UHIR_UHASSIGNEDSSN - UH Assigned Social Security #		
<input type="checkbox"/>	FERPA - FERPA		
<input type="checkbox"/>	BIRTHDATE - Date of Birth		
<input type="checkbox"/>	SEX - Gender		
<input type="checkbox"/>	ETHNIC_GRP_CD - Ethnic Group	Join ETHNIC_GRP_TBL - Ethnic Group Table	
<input type="checkbox"/>	UHCB_ETHNIC_ORIGIN - Ethnic Origin		
<input type="checkbox"/>	UHIR_NEW_ETHNIC_CB - IR CB New Ethnicity		
<input type="checkbox"/>	UHIR_NEW_EDESC_CB - IR CB New Ethnic Description		
<input type="checkbox"/>	EMAIL_ADDR - Email Address		
<input type="checkbox"/>	UHIR_OTHR_EMAIL - Other Email Address		
<input type="checkbox"/>	UHIR_DEST_EMAIL - Destination Email		
<input type="checkbox"/>	PHONE - Telephone		
<input type="checkbox"/>	UHIR_MAIL_ADDRESS1 - Mail Address 1		
<input type="checkbox"/>	UHIR_MAIL_ADDRESS2 - Mail Address 2		
<input type="checkbox"/>	UHIR_MAIL_ADDRESS3 - Mail Address 3		
<input type="checkbox"/>	UHIR_MAIL_ADDRESS4 - Mail Address 4		
<input checked="" type="checkbox"/>	UHIR_MAIL_CITY - Mail City		

- Records
- Query
- Expressions
- Prompts
- Fields**
- Criteria
- Having
- Transformations
- View SQL
- Run

Query Name New Unsaved Query

Description

Feed

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

Reorder / Sort


Fields






1-2 of 2


View All

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	B.EMPLID - Empl ID	Char11				ID		<input type="button" value="Edit"/>	—
2	B.UHIR_MAIL_CITY - Mail City	Char30				Mail City		<input type="button" value="Edit"/>	—

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

Edit Field Properties

Field Name B.EMPLID - Empl ID

Heading

- No Heading RFT Short
 Text RFT Long

Heading Text

ID

*Unique Field Name

B.EMPLID

Aggregate

- None
 Sum
 Count
 Min
 Max
 Average
 Count Distinct

OK

Cancel

Edit Field Properties

Field Name B.EMPLID - Empl ID

Heading

- No Heading RFT Short
 Text RFT Long

Heading Text

TOTAL STUDENTS

*Unique Field Name

B.EMPLID

Aggregate

- None
 Sum
 Count
 Min
 Max
 Average
 Count Distinct

OK

Cancel

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.

Edit Field Ordering

New Column	Column	Record.Fieldname	Order By	Descending	New Order By
<input type="text"/>	1	B.UHIR_MAIL_CITY - Mail City	2	<input type="checkbox"/>	<input type="text" value="2"/>
<input type="text"/>	2	B.EMPLID - Empl ID	1	<input checked="" type="checkbox"/>	<input type="text" value="1"/>

OK

Cancel

- Records
- Query
- Expressions
- Prompts
- Fields
- Criteria**
- Having
- Transformations
- View SQL
- Run

Query Name

New Unsaved Query

Description



Add Criteria

Group Criteria

Reorder Criteria

Criteria

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
<input type="text" value="AND"/>	A.EMPLID - ID	equal to	B.EMPLID - Empl ID	<input type="button" value="Edit"/>	<input type="button" value="—"/>
<input type="text" value="AND"/>	A.INSTITUTION - Academic Institution	equal to	B.INSTITUTION - Academic Institution	<input type="button" value="Edit"/>	<input type="button" value="—"/>
<input type="text" value="AND"/>	A.INSTITUTION - Academic Institution	equal to	00730	<input type="button" value="Edit"/>	<input type="button" value="—"/>
<input type="text" value="AND"/>	A.STRM - Term	equal to	2150	<input type="button" value="Edit"/>	<input type="button" value="—"/>
<input type="text" value="AND"/>	A.UHIR_ENROLL_CURR - Currently Enrolled Flag	equal to	Y	<input type="button" value="Edit"/>	<input type="button" value="—"/>

Save

Save As

New Query

Preferences

Properties

Publish as Feed


Publish as Pivot Grid

New Union

- Records
- Query
- Expressions
- Prompts
- Fields
- Criteria
- Having
- Transformations
- View SQL
- Run

Query Name New Unsaved Query

Description

 Feed ▾

XLAT/Related Language

Query SQL

```
SELECT B.UHIR_MAIL_CITY, COUNT(*)
FROM PS_UHIR_STDNT_STRM A, PS_UHIR_STUDENTS B
WHERE (A.EMPLID = B.EMPLID
AND A.INSTITUTION = B.INSTITUTION
AND A.INSTITUTION = '00730'
AND A.STRM = '2150'
AND A.UHIR_ENROLL_CURR = 'Y')
GROUP BY B.UHIR_MAIL_CITY
ORDER BY 2 DESC, 1
```

Save

Save As

New Query

Preferences

Properties

Publish as Feed

Publish as Pivot Grid

New Union

Enter a name to save this query:

*Query

Description

Folder

*Query Type ▼

*Owner ▼

Query Definition

OK

Cancel

Records Query Expressions Prompts Fields Criteria Having Transformations View SQL **Run**

[View All](#) | [Rerun Query](#) | [Download to Excel](#) | [Download to XML](#)

First 1-100 of 1286 Last

Row	Mail City	TOTAL STUDENTS
1	Houston	20954
2	Katy	3016
3	Sugar Land	2698
4	Richmond	1932
5	Spring	1543
6	Pearland	1374
7	Cypress	1284
8	Missouri City	1175
9	Humble	748
10	Pasadena	542
11	League City	449
12	Tomball	447
13	Friendswood	371
14	Kingwood	369
15	Conroe	349
16	Baytown	325
17	San Antonio	310
18	Rosenberg	287
19	The Woodlands	280