

Customized Reports using Microsoft Access 2010



If you are considering using Microsoft Access to view InfoSource data, it is assumed that the SIRI reports are not robust enough to meet your student data needs. You will need to request an InfoSource account and then request InfoSource data access (Student Records).

Objectives:

At the end of this course you will be able to:

- Obtaining InfoSource Table Access
- Data Security and You
- Plan your question and results before you begin
- HUB, Istrategy, and Your Data – What you need to know
- Understanding Relational Databases

Obtaining InfoSource Access

Step 1: Complete the Online Handling Data Safely Course – If you have HUB access, chances are that you've already completed this course. If you do not have access to HUB, you can find the instructions on how to access the UBLearns class at <http://hubtraining.buffalo.edu/pdfs/handlingDataSafely.pdf> The Student Records Data Custodian will verify whether or not you've completed this course. If you did not, they will contact you before they process your request.

Step 2: Obtain an InfoSource login – Print out the following page, complete it, and fax it back to 716-645-3588. Please make sure your supervisor has approved this request by signing the bottom of the form

Step 3: Obtain Access to Student Records Tables - The only information that you can find in InfoSource tables is Student Data related information. To request access to this data via InfoSource, you must complete the following form at: <https://vovici.com/wsb.dll/s/8727g4a2f5>

Data Security and You

We need to talk a bit about the data that you are using and how you are using it. There are several laws and regulation that govern data.

Complete the Handling Data Safely Course – The University has created an online course for you to complete before you get access to any student data. If you've completed this course already for HUB access, there is no need to complete it again. If you've never completed the course, you can find instructions at: <http://hubtraining.buffalo.edu/pdfs/handlingDataSafely.pdf> The data custodian for Student Records will verify that you have completed this course when you apply for InfoSource access.

UB Standards for Securing Regulated Private Data Policy – Privately regulated data consists of (1) Social Security number, (2) state-issued driver’s license number or non-driver identification number, (3) credit or debit card number or other financial account number, (4) computer access protection data such as passwords, and (5) protected health information. All employees with access to regulated private data need to follow security standards for handling private data. These standards can be found in the policy at: <http://itpolicies.buffalo.edu/NewPolicyLibrary/StandardsRegPrivData.pdf> Notice that employees should not send regulated data over the internet or by email.

Red Flags Identity Theft Prevention – All employees who have access to protected information via HUB or InfoSource, should be aware of this new federal policy. The Federal Trade Commission (FTC) requires that institutions detect patterns, practices, and specific forms of activity that indicate the existence of identity theft and prevent an individual from using false identifying information to obtain goods, services, or credit. All employees who have access to and utilize regulated data should be concerned with protecting this data by use of encrypted methods or may face fines for distribution of regulated data. (e.g. \$1500 per instance). This means employees SHOULD not be emailing social security numbers to coworkers. Email IS NOT a secure form of transmission. This policy is located at: <http://policy.business.buffalo.edu/Policy%20Library/Red%20Flags%20Identity%20Theft%20Prevention%20Policy.pdf>

FERPA – FERPA was enacted to protect student information. It mandates that the student is allowed to inspect their educational records and limit others from reviewing that information without your permission. More information about FERPA can be found at <http://registrar.buffalo.edu/personalinfo/ferpa.php>. For a direct view of the law you can view this on the Department of Education’s website at: <http://www2.ed.gov/policy/gen/guid/fpco/ferpa/index.html>

Blackboard Analytics Association of Effective-Dated Rows to a Term Record

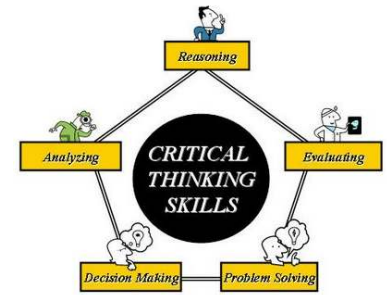
Before we get into extracting data from HUB, you should be aware of how the architecture of data is designed here at UB. This may very well have an effect on your data, particularly when pulling data from the tables.

HUB is the enterprise system that holds and maintains all of our data. It is very complex and in that complexity has numerous fields and tables that are replicated. As a result it is very cumbersome and replicative. The University has chosen Blackboard Analytics to help with the mining of data from HUB for institutional reporting needs. Once Blackboard Analytics has obtained the data, both SIRI and the InfoSource Tables feed off of Blackboard Analytics to present the data in a useable format. Why is this important for you to know, you ask? With all this “shifting” of data, it is likely that the data results you get may not be consistent. So it’s very important that you step back from your results and look at them critically based on the working knowledge you have gleaned from doing your job day to day, or your historical knowledge. **DON’T ACCEPT THE RESULTS BLINDLY.**



Pre-Planning your Work

Pre-planning your work before you even open up Microsoft Access or go anywhere else to get the data will go a long way in saving time and effort. Planning is best when you think about what you are seeking and then working backward.



Go to https://isonline.buffalo.edu/metadata/metadata_table_results.cfm and select from the hyperlinks in the far left column to view fields and their format.

Specific Question/Problem Statement:

The following are common fields that need to have information in them as it applies to your question. Please complete the following worksheet to allow for your query experience to go easier.

Field Consideration	Search Term	Format of Data
Term(s)		
Career(s)		
Academic Level(s)		
Program(s)		
Plan(s)		
GPA(s)		
Student Person Number		
What kind of format do you want your data? (Web page, print layout, CSV, or MS Access)		
EmplidID		
List other fields below		

If you need multiple terms or a range of terms, you will need to use MS Access to get your results.

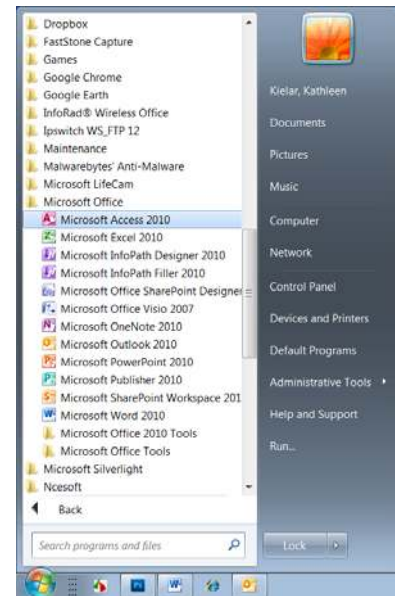
Remember to always review your results. You have the best sense of your data. Be a critical thinker!

Understand Relational Databases

Microsoft Access is considered to be a relationship database. In other words, the database consists of a collection of tables, each of which contains information on a specific subject. You use relational database software to manage data that is organized into lists, such as information about students, grades, financial aid, enrollment, class size, etc. Although Excel offers some list management features, Access provides many more tools and advantages for managing data. The advantages are mainly due to the “relational” nature of the lists that Access manages.

Launching MS Access 2010

Microsoft Access can be found in a folder off of the Windows 7 Start Menu in a folder called “Microsoft Office”. Navigate to the program and click on it to open it.



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