P20 WIN User Manual: Basic User Interface Account Functions

A training and reference manual for Connecticut's Preschool through Twenty & Workforce Information Network (P20 WIN) User Interface

Contents

Revision History Log

| Date	Version	Description of Revision	Author(s)
11/26/13	1.0	Initial Delivery of Document	Laurel Buchanan
1/23/14	1.1	Delivery of Document to P20 WIN PLT	Laurel Buchanan

1.0 Introduction

The Preschool through Twenty and Workforce Information Network (P20 WIN) is the data sharing system designed to help monitor success at the macro level, meet reporting requirements and answer critical policy questions. The system will assist the state in achieving the vision that more students complete high school ready for college and the workforce and that students completing academic programs in Connecticut enter meaningful and well-paying jobs in Connecticut soon after completion and advance their careers in CT. This manual serves as a "how to manual" for the basic functionality of the P20 WIN User Interface (UI). As such it outlines how users can use the P20 WIN UI from the most basic levels of account registration through the submission of data requests and the download of approved data. Administrative functions such as data element management, query execution and accessing audit logs are covered in other Manuals directed at Agency Administrators and Tech Admins. This manual is also not designed to cover query management or governance policies. These policies can be found in the documents *"P20 WIN - Data Governance Policy"* and *"P20 WIN Query Management Process".*

1.1 P20 WIN SYSTEM ARCHITECTURE OVERVIEW

The P20 WIN System has a distributed network architecture which consists of one main module and a remote module for each of the network participants, the State Department of Education (SDE), the Board of Regents for Higher Education (BOR) and the Department of Labor (DOL).

P20 WIN / State Longitudinal Data System Diagram
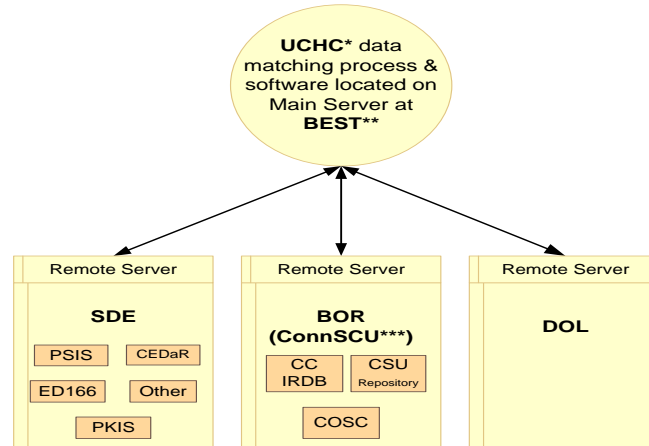

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*   UCHC:  University of Connecticut Health Center
**  BEST:  Bureau of Enterprise Systems and Technology (DOIT)
*** ConnSCU:  Connecticut State Colleges and Universities
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Data from the participants is utilized by the P20 WIN system through a two-step process: The first step is an 'initialization' process that uses limited personally identifiable information (PII) to identify matching records of individuals for the creation of record locators at Remote Servers attached to the Participants' data systems. Records are matched using a probabilistic matching algorithm that identifies record matches among the Participants' data sets to be linked and complete the matching process. The second step, which only occurs after a data request (Query) has been submitted by a Requestor and approved by the Data Governance Board, utilizes the record locators to create a combined data set. This combined data set contains only data associated with the individuals but no PII.

1.2 THE P20 WIN USER INTERFACE

Approved users access the P20 WIN System via the web based UI. Through the UI, approved users can browse metadata, build and save queries, approve queries and manage data fields and users depending on the permissions granted through their account. To inquire about UI access and account registration email Jan Kiehne (kiehnej@ct.edu) with the Connecticut Board of Regents for Higher Education.

1.3 P20 WIN ROLES AND PRIVILEGES

Access to the P20 WIN UI is gained though the creation of an active system account. P20 WIN provides user access to various functionalities based upon designated roles. As such, *system accounts are intended to be individual and not shared.* P20 WIN roles are currently divided into three account types: Data Consumer*, Agency Administrator*, and Tech Admin. Roles and their corresponding rights within the system are detailed in Table 1: P20 WIN User Roles and Privileges.

Please note that the roles of Data Consumer and Agency Administrator are otherwise named in some other documents. The role of Data Consumer is referred to elsewhere as Data Requestor, while the role of Agency Administrator is referred to as Data Manager/Steward. For the purposes of simplicity this guide will exclusively use the role titles as they are found in the P20 WIN application.
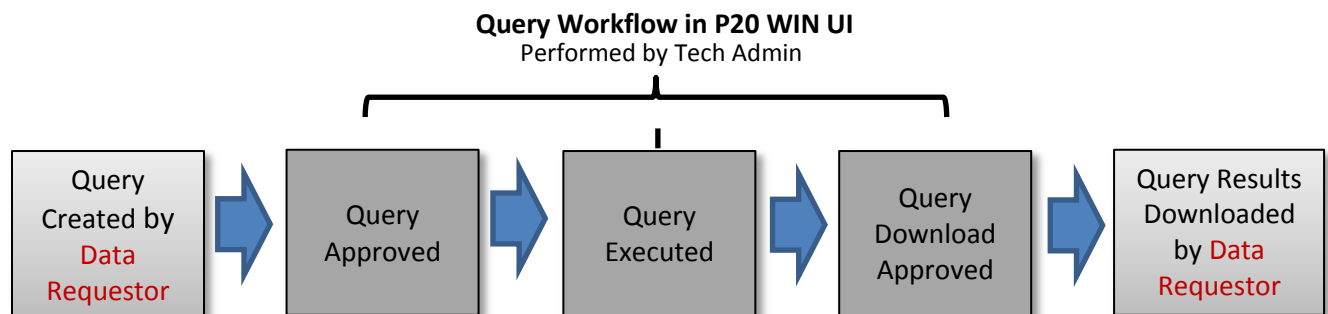
Table 1: P20 WIN User Roles and Privileges

This chart describes how authorized users interact with the software system.			
Action	**Data Consumer**	**Agency Administrator**	**Technical Admin**
My Account Features: Viewing messages, editing your profile and changing your password. S*ee sections 2 and 3 of this manual*	√	√	√
Browse Metadata: Browsing meta-data includes viewing what data elements are available to the system and the data element definitions. Does not provide access to any actual data. S*ee section 4 of this manual*	√	√	√
Build query: Selecting data elements from the UI and saving a query. S*ee section 5 of this manual*	√	√	√
Review and approve query: Viewing the query to verify that it matches specifications in an approved Query Management Document and approve or disapprove the query accordingly. *See the Tech Admin Manual*			√
Execute query and schedule for execution: Performing the technical step on an approved query that enables and pulls and matches data from the included data sources. *See the Tech Admin Manual*			√
Review/approve query results for download: After execution verifying that the query ran as expected before enabling the query results to be downloaded by the approved requestor. *See the Tech Admin Manual*			√
Download Query Results: Downloading query results of a query that you submitted after approval for download has been received. S*ee section 6 of this manual*	√		
Monitor the usage of queries and dataset downloads: Viewing status logs which show query status. S*ee section 5 of this manual*	√*	√*	√
Enable/disable data source: Enabling or disabling your agency's data source to make it available or unavailable for query. *See the Agency Administrator Manual*		√*	
Enable/disable the system: Enabling or disabling the entire system available to make it available or unavailable for query. *See the Tech Admin Manual*			√
Manage properties of data elements from data source: Setting properties for each data field to make fields visible/invisible and available/not available through the UI. *See the Agency Administrator Manual*		√**	
System Monitoring and Configuration Information: Viewing system status and configuration information. *See the Agency Administrator and Tech Admin Manuals*		√	√
User Management: Registering users, setting user privileges, unlocking accounts and resetting forgotten passwords. *See the Tech Admin Manual*			√
View and Download P20 WIN Application Logs: Viewing and downloading application logs for auditing and monitoring purposes. *See the Tech Admin Manual*			√

*User can only view the status of queries that they submitted.
**User can only perform these functions on data from their Agency.

1.4 QUERY WORKFLOW*

Data is retrieved from the P20 WIN System though a query workflow process. Data queries are built by Requestors and approved via a multistep procedure. The query work flow begins when a Requestor builds and saves a query containing specific data elements. The query then goes through a three step process of approval, execution and approval for download*. Once this process is complete the Requestor has a period of 7 days to download the data. All query workflow processes are managed through the P20 WIN UI.

Query Workflow in P20 WIN UI
Performed by Tech Admin

| Query Created by **Data Requestor** | → | Query Approved | → | Query Executed | → | Query Download Approved | → | Query Results Downloaded by **Data Requestor** |

* Note: this process describes the steps within the P20 WIN Application and does not address the approval of queries by the P20 WIN Data Governance Board. Approval must be gained from the Data Governance Board prior to beginning this process.

1.5 OVERVIEW OF THE P20 WIN USER INTERFACE

Approved Users access the P20 WIN system via a web based UI. The initial screen seen upon entry is the Home screen which provides access for Users to login to the UI. From the Home screen Users can also access a FAQ tab which answers some general questions about P20 WIN. Once a user is logged in additional tabs appear across the top of the page, each of which has screens used to access P20 WIN functions. The tabs consist of a "Data Sources" tab, a "Queries" tab and an "Admin" tab. Additionally, on the top right of every screen, users will find links to manage their account and logout of the UI.

The functions found under each tab are as follows:

Data Sources: Provides access to browse metadata to all user account types. Users will find summary information on all on all data sets in the P20WIN system by selecting the "Overview" screen. Users will also find metadata for Participant specific datasets by selecting the appropriate Participant screen.

Queries: Provides access to screens on which Users can build and submit queries. Additional screens will be available to Agency Administrators and Tech Admins for access to query management tasks. Screens include:

- ❖ Create New Query: Used by Data Consumers to build and save queries
- ❖ Query Management: Displays all queries that are in the system along with their statuses. Used by Administrators to approve, execute and approve query results for download
- ❖ View Execution Schedule: Displays query execution schedule

Admin: Provides Agency* and Tech and Administrators access to administrative functions. Screens consist of:

- ❖ Users: Displays all approved an disabled users
- ❖ Add User: Used to add user accounts
- ❖ Remote Data Fields: Used to view and manage data element properties
- ❖ Monitor System: Displays data sources and the connectivity status
- ❖ System Configuration: Displays system configuration information
- ❖ Log Review: Access point to download logs for audit purposes

*Agency Administrators are only provided access to manage functions for the data contributed by their own organization.

2.0 Using the P20 WIN User Interface

The following sections provide step by step instructions for users interacting with the P20 WIN UI.

2.1 Login

The P20 WIN UI requires users to login prior to gaining access to any of its functions. In order to reach the P20 WIN login screen users must be first logged into the State of Connecticut Network. Users employed by agencies on the State Network may go directly to the P20 WIN Home Page to login. As of 12/31/13 Network account holders are employees of the State Department of Education and the Department of Labor. All other account holders will need Gateway accounts and will begin login steps by logging into the State Network. For more information on these distinctions, on how to obtain a Gateway account, and for login instructions for the Gateway account please contact the P20 WIN Administrator at ConnSCU-P20WIN-Admin@ct.edu.

To login execute the following:

1. Ensure that you are logged into the state network and Browse to the P20 WIN Home page
2. Click the login link

3. In the login box enter username and password. *Please note that both password and username are case sensitive.*
4. Click the "Login" button

5. You will return to the initial screen. The message "You have successfully logged in! Welcome to P20WIN!" will appear in red at the top center of the screen to indicate that you have successfully logged in

2.1.1 LOGIN FAILURES

If an incorrect username or password is entered in the login box the box will remain visible along with the message "invalid user name and password" which will appear in red at the top center of the screen.

2.1.2 FORGOTTEN PASSWORDS

If you have lost your password to either the Gateway or the P20 WIN UI please email P20 WIN Administrator at ConnSCU-P20WIN-Admin@ct.edu.

Please Note: As of 12/31/13 the Forgot Password" link shown below is not active. **Do not attempt to use this link to recover a lost password.**
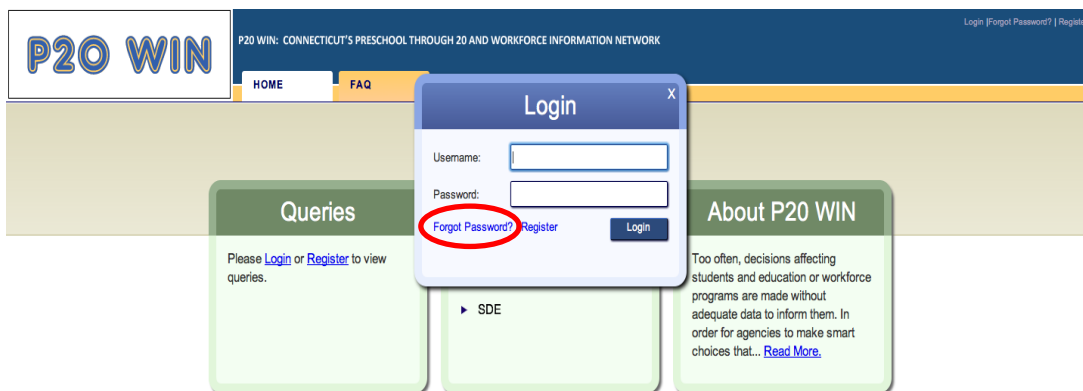
2.1.3 FORGOTTEN USERNAMES

To recover a forgotten username please email the P20 WIN Administrator at ConnSCU-P20WIN-Admin@ct.edu.

2.1.4 ACCOUNT LOCKOUT

Entering an incorrect password 3 times in succession will result in the locking of that user account. To unlock a user account please email the P20 WIN Administrator at ConnSCU-P20WIN-Admin@ct.edu.

2.2 USER LOGOUT

Users should promptly logout once their work with the UI is complete or if they need to step away from their computer for a prolonged period of time. To logout of the P20 WIN UI execute the following steps:

1. Click the "Logout" button displayed on the top right hand corner of all P20 WIN screens

2. You will be returned to the initial P20 WIN screen but the "My Account" and '"logout"' buttons will no longer appear at the top right hand corner of the screen

2.2.1 TIMEOUT LOGOUT

After 30 minutes of inactivity the P20 WIN UI automatically logs the user out. After this a user attempting to access any part to the UI they be redirected to a screen with the message "You have not logged into the application or your session is expired. Click here to Login." Clicking on the "here " link will bring the user back to the initial screen and provide the opportunity to log back in to the UI (see section "2.2.1 Login" for steps to login.)

3.0 My Account

Once logged into the P20 WIN UI, users will find a "My Account" button at the top right of each screen. This button provides access to manage accounts including editing contact information and viewing messages. All registered users have access to "My Account"functions."

3.1 EDITING YOUR CONTACT INFORMATION

To edit your contact information execute the following steps:

1. Click on the "My Account" button at the top right of each screen. This will expand the button to provide three choices: "edit profile", "change password", and "view messages"
2. Click on the top option, "edit profile" which will bring you to the "edit user" screen
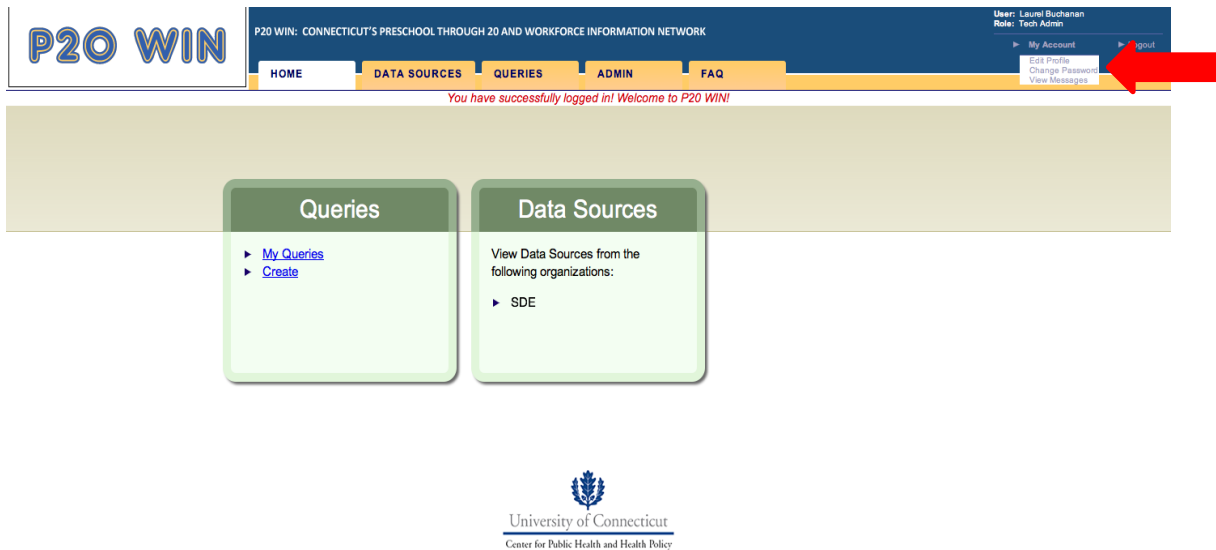
3. On the "edit user" screen you may change any of the following elements in your profile:
   a. First Name
   b. Last Name
   c. Email Address
   d. Phone number
   e. Organizational affiliation
   f. Department
   g. Mailing address
   h. User Group (Only Administrator accounts have this option, all
   i. other account types will be able to view user group information only.)

Edit User

Username: Ibuchanan

First Name: User

Last Name: User

Email: user@uchc.edu

Phone: 860-555-5555

Organization: Agency Name

Department: Department

Address:

User group:

Tech Admin

Submit

4. Click on the information that you wish to edit and change the text
5. Click the "Submit" button to save your changes
6. Your profile is now updated. You will receive the message "update of user: [name] successful!" in red at the top center of the page

3.2 RESETTING A PASSWORD

To reset a password please follow the steps outlined above in section 2.1.2.

3.3 VIEWING MESSAGES

The P20 WIN UI provides users with messages when a query that they have submitted is approved, executed or available for download. It also provides the same messages to Administrators for all queries. Messages appear at the top of "Query" and "Admin" tab pages but can also be viewed by executing the following steps:

1. Click on the "My Account" button at the top right of each screen. This will expand the button to provide three choices: "Edit Profile", "Change Password", and "View Messages"

2. Click on the bottom option, "View Messages" which will bring you to the "Messages" screen
3. This screen will display any messages waiting for you.
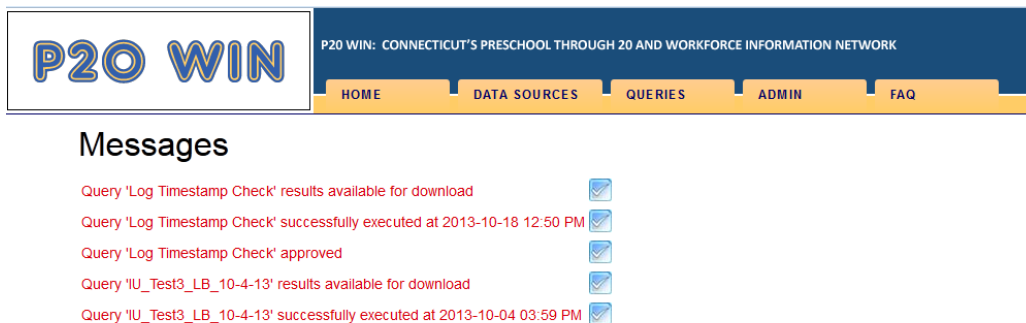
3.3.1 DELETING MESSAGES

All messages on the P20 WIN UI have the following format:

"Query Name" "Query Approved/Executed/Approved for Download"

Clicking on the blue check mark will delete the message. The message will be immediately deleted from the system and will not be recoverable.

4.0 Browsing Metadata

The P20 WIN UI displays extensive metadata to all account types. Metadata screens provide an overview of data source size and overlap as well as give some details on the probabilistic integration method. They also provide information on how matching was accomplished. Additional metadata screens for each P20 WIN Participant provide detailed information on the data elements contributed by that Participant. All registered users can browse metadata.

4.1 VIEWING OVERVIEW INFORMATION

The "Data Sources" tab holds summary information on the number of individuals and of records in each data source and displays information on the number of individuals that are present are in multiple data sources. To view overview information execute the following steps:

1. Click the "Data Sources" tab which will bring you to the "Overview" screen
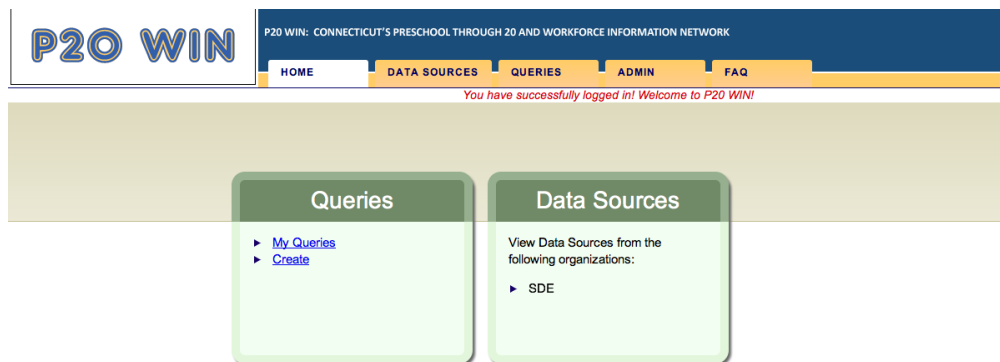
2. View information in the table at the top of the screen which includes the following columns:
    a. Data Source: Name of the data source
    b. Number of Individuals: Number of individuals in this data source
    c. Number of Records: Number of records in this data source
    d. Individuals Unique to Data Source: Number of individuals that are found in this data source only and will provide no matched records from any other data source in the network
    e. Individuals in Multiple Data Sources: Number of individuals that are found in other data sources. This includes counts of those found in only one other source and counts of those found in multiple data sources.

Table showing P20 WIN data by source with the overlap between data sources

Data Source	Number of Individuals	Number of Records	Individuals Unique to Data Source	Individuals in multiple Data Sources		
			(no external matches)	In exactly one other Data Sources	In two or more other Data Sources	In at least one other Data Sources
CCC	9967	10000	4168	5686	113	5799
CSU	9943	10000	9034	783	126	909
DOL	50000	50000	48839	1073	88	1161
SDE	20961	38426	13274	7526	161	7687
Total	90871	108426				

4.1.2 VIEWING INFORMATION ON MATCHING

Information on the identifiers available for use in matching are also available for review. To access this information execute the following steps:

1. Click the "Data Sources" tab which will bring you to the "Overview" screen
2. Scroll down to view the table that displays each data source and the identifiers it contains for use in matching

Overview

P20 WIN data originates from the participating organizations (Participants) who serve diverse but often overlapping groups of people. The following tables sh… each data source. Understanding the degree of overlap and completeness of available data is important when structuring a data request.

Table showing P20 WIN data by source with the overlap between data sources

Data Source	Number of Individuals	Number of Records	Individuals Unique to Data Source	Individuals in multiple Data Sources		
			(no external matches)	In exactly one other Data Sources	In two or more other Data Sources	In at least one other Data Sources
CCC	9967	10000	4168	5686	113	5799
CSU	9943	10000	9034	783	126	909
DOL	50000	50000	48839	1073	88	1161
SDE	20961	38426	13274	7526	161	7687
Total	90871	108426				

* - Information is not available because datasource is currently disabled.

Identifying Fields used in Record Linkage: First Name, Last Name, Sex, Date of Birth, Social Security Number, ZIP (?)

Table showing presence of each Identifying Field by Data Source with % of records populated.

Data Source	identifier	first name	last name	social security number	gender	zip code	date of birth			
CCC	N	Y(100.0 %)	Y(100.0 %)	Y(98.0 %)	Y(99.06 %)	N	Y(99.0 %)	Y(2.0 %)	Y(74.0 %)	Y(97.2 %)
CSU	N	Y(100.0 %)	Y(100.0 %)	Y(96.0 %)	Y(100.0 %)	N	N	Y(7.0 %)	Y(84.0 %)	Y(59.86 %)
DOL	N	Y(100.0 %)	Y(100.0 %)	N	N	N	N	N	N	N
SDE	N	Y(100.0 %)	Y(100.0 %)	N	Y(100.0 %)	N	Y(100.0 %)	N	N	Y(98.08 %)

4.2 VIEWING DATA SOURCE METADATA

Metadata tables for each P20 WIN participating organization will be found on the organization screen under the "Data Sources" tab. Metadata provided includes information on the number of individuals and records in the data sources and on the number of matches with other data sources. It also includes the following information about each data element:

a. Field Name: Name of the data element
b. Table Name: Name of the table from which the data element originates
c. Description: Short description of the data element
d. CDE: Common Data Element which provides common name of identified fields used in matching
e. Data Type: Data Type (i.e. integer, text, date, etc.)

f. Value Domain: Values and their meanings if appropriate (these can be viewed in a separate window by clicking the < > symbol)

g. % of Values Filled in: Provides the percentage of records which have an entry for this field

To view metadata execute the following steps:

1. Click the "Data Sources" tab, which will bring you to the "Overview" screen
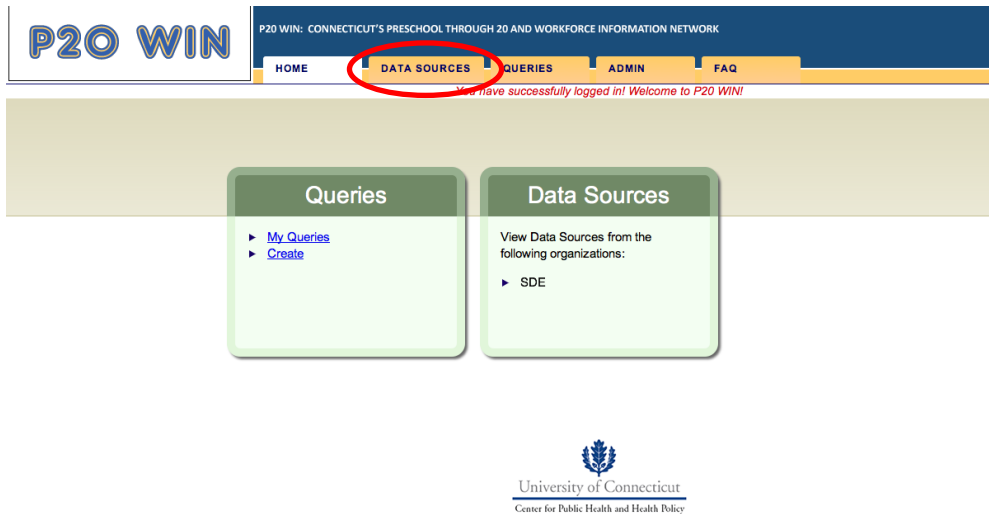
2. Click the agency screen, which will bring you to the data source page for that agency
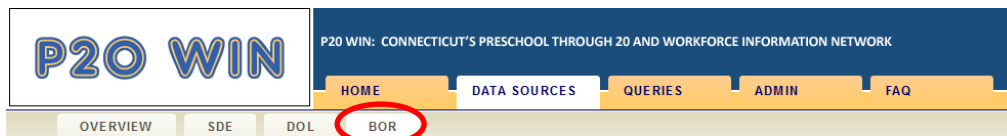
3. Click the link for the data source that you wish to review, which will result in the display of the metadata table for that data source

4. Consult the small table at the top for information concerning the number of individuals, records and matches with other data sources

5. Consult the larger table below for information on the data elements contained in the data source.

Field Name	Table Name	Description	CDE	Data Type	Value domain	% of Values Filled In
field name	table name	description				
Administered_FallOfYear	StudentTest_v	Year of Fall of school year in which the test was administered		SMALLINT		100.0
Administered_SpringofYear	StudentTest_v	Year of Spring of school year in which the test was administered		SMALLINT		100.0
Administered_StudentGradeCode	StudentTest_v	Grade of student administered a standardized test		CHAR(2)		100.0
AttendanceDays	StudentYearlyAttendance_v	Days student attended in a year		SMALLINT		100.0
BirthYear	StudentReportingDistrict_v	Year portion of Date of Birth		CHAR(4)		100.0
CollegePublicPrivate	StudentNSCCollege_v	Indicates whether the college that the student attended is a "Public" or Private" institution.		VARCHAR(10)		100.0
CollegeState	StudentNSCCollege_v	State in which the college is located		CHAR(2)		100.0
EndDate	StudentNSCCollege_v	End date for the student?s period of attendance. YYYYMMDD		CHAR(8)		100.0
EnrollmentStartDate	StudentNSCCollege_v	Begin date for the student?s period of attendance. YYYYMMDD		CHAR(8)		100.0
EnrollmentStatus	StudentNSCCollege_v	Full-time, Half-time, Less than half-time, Leave of absence, Withdrawn, Deceased		VARCHAR(25)		100.0

Showing 1 to 10 of 45 entries

4.2.1 NAVIGATING THE METADATA TABLES

By default metadata tables display the first 10 records from the data source. They can be expanded to display 25, 50, or 100 entries by selecting the number of entries from the "show entries" drop down box to the top left of the data source table. These tables can also be filtered and sorted.

Field Name	Table Name	Description	CDE	Data Type	Value domain	% of Values Filled In
field name	table name	description				
CC Age at Graduation	CCC_GRADUATION	Age at time of graduation		Number		100.0
CC CIP Code Major 1	CCC_GRADUATION	The CIP code that applies to the major. The Classification of Instructional Program (CIP) codes are six-digit codes in the form xxxxxx that identifies instructional program specialties within educational institutions. http://nces.ed.gov/ipeds/cipcode /Default.aspx?y=55		VarChar2		100.0
CC CIP Code Major 1	CCC_PLACEMENT_TEST	The CIP code that applies to the major. The Classification of Instructional Program (CIP) codes are six-digit codes in the form xxxxxx that identifies instructional program specialties within educational institutions. http://nces.ed.gov/ipeds/cipcode /Default.aspx?y=55		Varchar2		100.0
CC CIP Code Major 1	CCC_ACADEMIC_SUM	The CIP code that applies to the major. The Classification of Instructional Program (CIP) codes are six-digit codes in the form xxxxxx that identifies instructional program specialties within educational institutions. http://nces.ed.gov/ipeds/cipcode /Default.aspx?y=55		Varchar2		100.0
CC CIP Description	CCC_PLACEMENT_TEST	Classification of Instructional Program Code		VarChar2		100.0
CC CIP Description	CCC_GRADUATION	Classification of Instructional Program Code		Varchar2		100.0
CC CIP Description	CCC_ACADEMIC_SUM	Classification of Instructional Program Code		Varchar2		100.0
CC ConnSCU ID	CCC_STUDENT_MATCH	A unique identifier that combines the student's system assigned PIDM with a code for the institution. The Intitution code is concatenated with the student PIDM to distinguish individuals across the institutions governed by the Board of Regents for Higher Education (BOR) - Connecticut State Colleges & Universities (ConnSCU)		Varchar2		100.0
CC ConnSCU ID	CCC_STUDENT	A unique identifier that combines the student's system assigned PIDM with a code for the institution. The Intitution code is concatenated with the student PIDM to distinguish individuals across the institutions governed by the Board of Regents for Higher Education (BOR) - Connecticut State Colleges & Universities (ConnSCU)		Varchar2		100.0
CC ConnSCU ID	CCC_FIN_AID_YEAR	A unique identifier that combines the student's system assigned PIDM with a code for the institution. The Intitution code is concatenated with the student PIDM to distinguish individuals across the institutions governed by the Board of Regents for Higher Education (BOR) -		Varchar2		100.0

4.2.2 SORTING METADATA

Each column in the metadata tables is sortable in both ascending and descending order. Sort arrows are found at the top right of each column header. Simply click the sort arrows once for ascending order and a second time for descending order.

4.2.3 SEARCHING METADATA

Each metadata table has a search function which gives users the option of searching by entries in a single column, multiple columns, or across the entire table. To search a metadata table by text in columns execute the following steps:

1. Enter the text for which you would like to search in the box(es) directly under the column heading(s).
2. The table will now only display metadata for elements that contain the entered text in that column or columns.
3. To return to the complete table simply delete the text in the search box(es)

Field Name	Table Name	Description	CDE	Data Type	Value domain	% of Values Filled In
CIP	table name	description				
CC CIP Code Major 1	CCC_GRADUATION	The CIP code that applies to the major. The Classification of Instructional Program (CIP) codes are six-digit codes in the form xxxxxx that identifies instructional program specialties within educational institutions. http://nces.ed.gov/ipeds/cipcode /Default.aspx?y=55		VarChar2		100.0
CC CIP Code Major 1	CCC_PLACEMENT_TEST	The CIP code that applies to the major. The Classification of Instructional Program (CIP) codes are six-digit codes in the form xxxxxx that identifies instructional program specialties within educational institutions. http://nces.ed.gov/ipeds/cipcode /Default.aspx?y=55		Varchar2		100.0
CC CIP Code Major 1	CCC_ACADEMIC_SUM	The CIP code that applies to the major. The Classification of Instructional Program (CIP) codes are six-digit codes in the form xxxxxx that identifies instructional program specialties within educational institutions. http://nces.ed.gov/ipeds/cipcode /Default.aspx?y=55		Varchar2		100.0
CC CIP Description	CCC_PLACEMENT_TEST	Classification of Instructional Program Code		VarChar2		100.0
CC CIP Description	CCC_GRADUATION	Classification of Instructional Program Code		Varchar2		100.0
CC CIP Description	CCC_ACADEMIC_SUM	Classification of Instructional Program Code		Varchar2		100.0

Showing 1 to 6 of 6 entries (filtered from 175 total entries)

To search for text across an entire metadata table execute the following steps:

1. Enter the text for which you would like to search in the search box just above the right of the table
2. The table will now be searched to display only metadata for elements that have the entered text in any of the columns
3. To return to the complete table simply delete the text in the search box

Show 10 ▾ entries — Search all columns: graduation

Field Name	Table Name	Description	CDE	Data Type	Value domain	% of Values Filled In
field name	table name	description				
CC Age at Graduation	CCC_GRADUATION	Age at time of graduation		Number		100.0
CC CIP Code Major 1	CCC_GRADUATION	The CIP code that applies to the major. The Classification of Instructional Program (CIP) codes are six-digit codes in the form xxxxxx that identifies instructional program specialties within educational institutions. http://nces.ed.gov/ipeds/cipcode /Default.aspx?y=55		VarChar2		100.0
CC CIP Description	CCC_GRADUATION	Classification of Instructional Program Code		Varchar2		100.0
CC ConnSCU ID	CCC_GRADUATION	A unique identifier that combines the student's system assigned PIDM with a code for the institution. The Intitution code is concatenated with the student PIDM to distinguish individuals across the institutions governed by the Board of Regents for Higher Education (BOR) - Connecticut State Colleges & Universities (ConnSCU)		Varchar2		100.0
CC degree Code	CCC_GRADUATION	Unique Degree Code to identify the degrees offered. AS = Associate in Science CERT = Certificate AA = Associate in Arts 000000 = Undeclared AAS = Associate in Applied Science		VarChar2		100.0
CC Degree Code Description	CCC_GRADUATION	The type of degree associated with Program.		VarChar2		100.0
CC Graduation Date	CCC_GRADUATION	Anticipated graduation date		Date		99.0
CC Graduation Status	CCC_GRADUATION	Graduation status		Varchar2		99.0
CC High School Graduation Year	CCC_STUDENT	Year that student graduated from High School		Varchar2		88.0
CC Institution Code	CCC_GRADUATION	Code describing the College 01 System Office 02 Manchester 03 Northwestern CT 04 Norwalk 05 Housatonic 06 Middlesex 07 Capital 08 Naugatuck Valley 09 Gateway 10 Tunxis 11 Three Rivers 12 Quinebaug Valley 13 Asnuntuck		Varchar2		100.0

Showing 1 to 10 of 38 entries (filtered from 175 total entries)

4.2.4 SHOWING/HIDING METADATA COLUMNS

Users may hide or show columns in each metadata table.   To hide or show a column in a metadata table by text in columns execute the following steps:

1. Click the "Show/hide columns" tab at the top right of the metadata table. The column list will expand below

2. Columns with check marks will show in the metadata table, those without will be hidden. To hide a column unclick the associated check box. The column will now be hidden
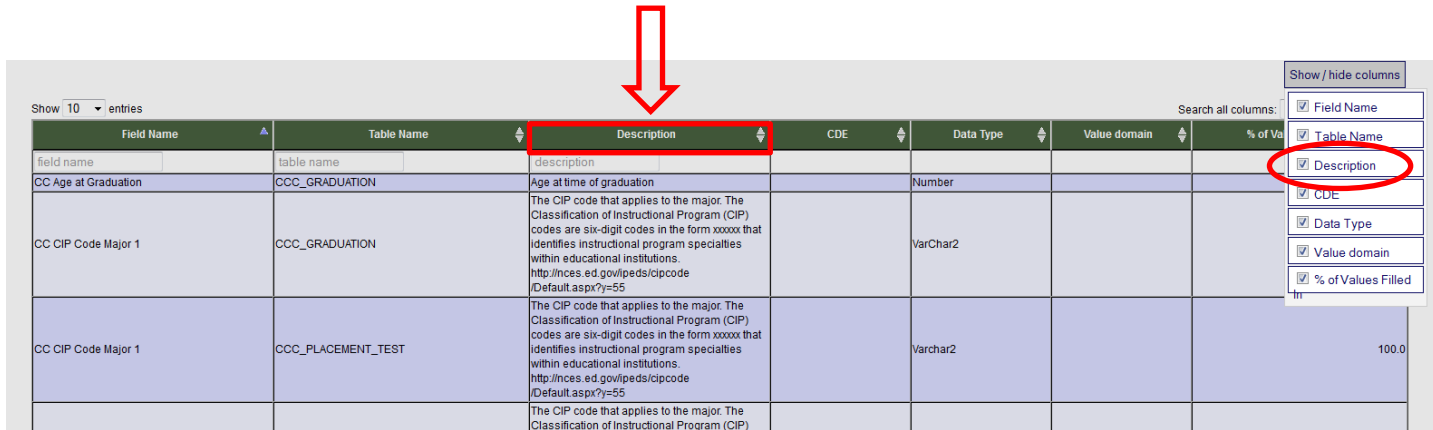
3. To show a column that is hidden click the associated check box. The column will now be shown in the metadata table


5.0 Building and Submitting Queries

All Account types have permissions to request data through P20 WIN by building, saving and downloading a query, but please note that only Data Consumers have permission to download data, and that a query can only be downloaded by the user who requested it. Because of this Agency Administrators and Tech Admins should build and save queries for testing purposes only. Once Requestors have built and saved a query, and approval has been granted by the P20 WIN Governing Board, the Tech Admin will move the query through the three step process of approval, execution and approval for download. Once the query has moved through this entire process it will be available for download by the requestor.

## 5.1 BUILDING AND SAVING A QUERY

Queries can be built and saved on the "Create New Query" screen of the "Queries" tab. Please note that changes to queries cannot be made once they are submitted*. To build and save a query execute the following steps:
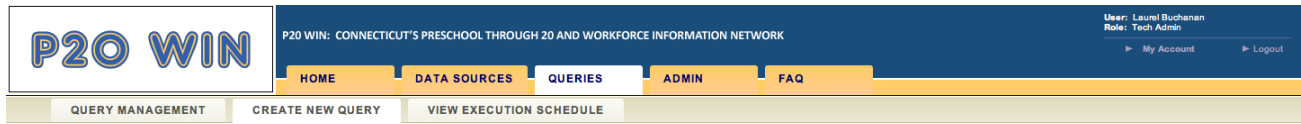
1. Click the "Queries" tab which will bring you to the "Query Management" screen
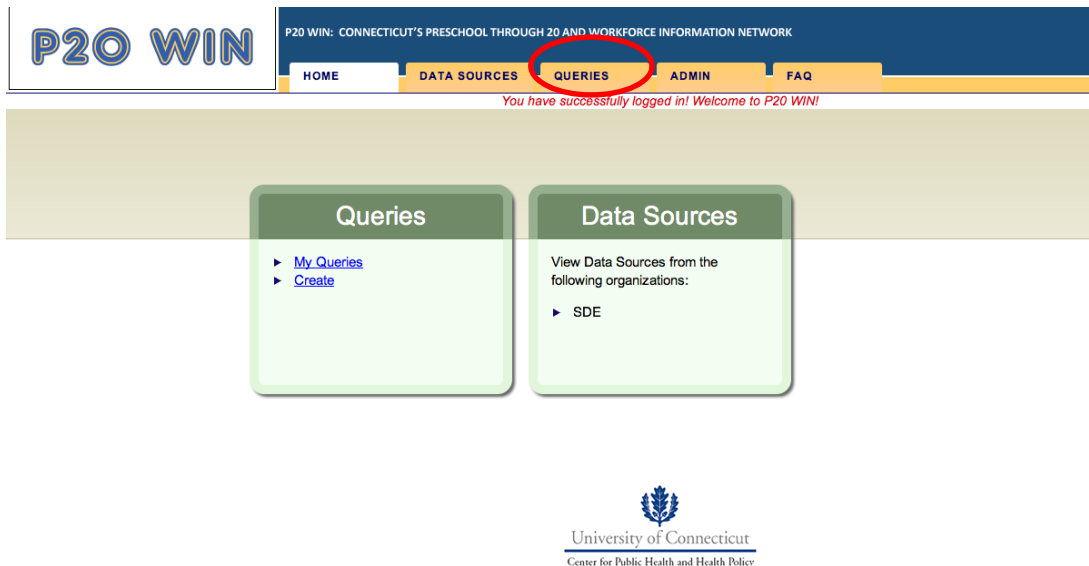
2. Click the "Create New Query" screen which will bring you to the "Create Query" screen
3. Provide a name and description for the query that you are about to build
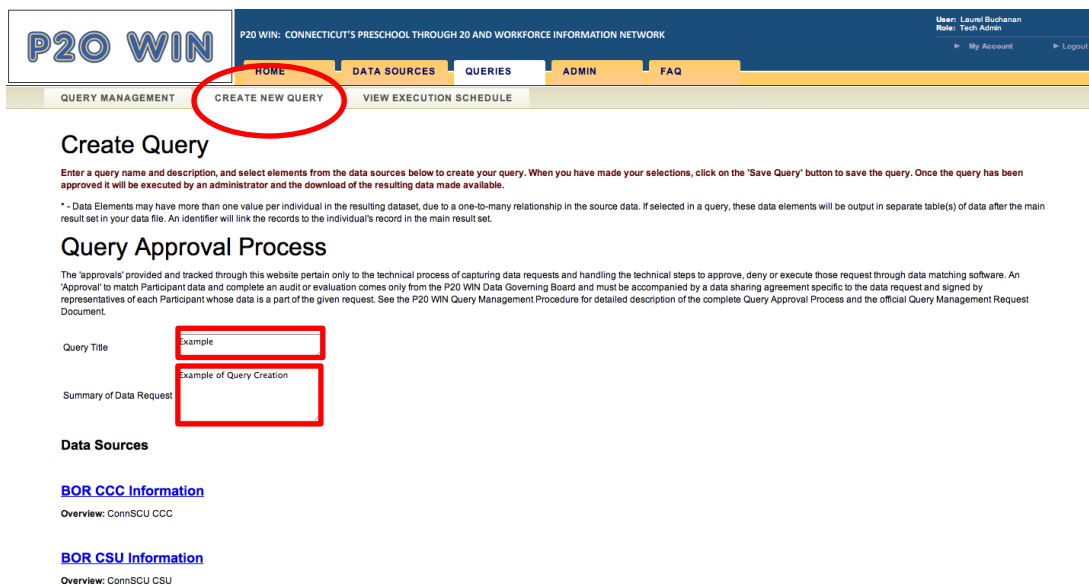
4. Click the data source link to expand the first data source that you wish to include in your query

5. Click the check box in the far right "Select Field" column to include the data element in the query. Note: if a data element has an entry of N/A instead of a check box, this element is not available for use in queries.
6. Repeat steps 4 and 5 for any additional data sources that you wish to include in your query

Data Sources

BOR CCC Information

Overview: ConnSCU CCC

NA - Items listed for information use only, cannot be used in creating queries

Show / hide columns

Show [10 ÷] entries   Search all columns: [   ]

Field Name ▲	Table Name	Description	CDE	Data Type	Value Domain	Select Field
field name	table name	description				
CC ConnSCU ID	CCC_STUDENT_MATCH *	A unique identifier that combines the student's system assigned PIDM with a code for the institution. The Intitution code is concatenated with the student PIDM to distinguish individuals across the institutions governed by the Board of Regents for Higher Education (BOR) - Connecticut State Colleges & Universities (ConnSCU)		Varchar2		☐
CC ConnSCU ID	CCC_FIN_AID_YEAR *	A unique identifier that combines the student's system assigned PIDM with a code for the institution. The Intitution code is concatenated with the student PIDM to distinguish individuals across the institutions governed by the Board of Regents for Higher Education (BOR) - Connecticut State Colleges & Universities (ConnSCU)		Varchar2		☐
CC Date of Birth	CCC_STUDENT_MATCH *	Date of Birth of the student	dob	Date		☑
CC Financial Aid - Aid Year	CCC_FIN_AID_YEAR *	The year for which the financial aid should be applied to the student's account.		Number		☑
CC Financial Aid Parent Contribution	CCC_FIN_AID_YEAR *	Amount of parent's contribution portion of the Expected Family Contribution (EFC)		Varchar2		☑
CC Financial Aid School Lunch Response	CCC_FIN_AID_YEAR *	Specifies if either the parent or child indicated on their FAFSA form that the child received Free or Reduced Lunch (FRL) during high school. Yes, No		Varchar2		☐
CC Financial Aid Student Contribution	CCC_FIN_AID_YEAR *	Amount of student's contribution portion of the Expected Family Contribution (EFC)		Varchar2		
CC First Name	CCC_STUDENT_MATCH *	First Name of the Student	fname	Varchar2		NA
CC Gender	CCC_STUDENT_MATCH *	Gender of the Student. M = Male F = Female	sex	Varchar2		☐
CC High School Code	CCC_STUDENT_MATCH *	College Board High School Code assigned to the high school (e.g. 70323 - RHAM High School)	hscode	Varchar2		☐

Showing 1 to 10 of 15 entries   ▶

7. Once all data elements are selected scroll down and click the "Point of View Filtering Link" to select a point of view for the query.

Filtering

Point of View Filtering

Description: Results returned from this query must have entries in at least one of the following Data Sources, if specified.

Please check your submission. Once saved, data queries may not be edited.

[Save Query]

8. The "Point of View Filtering" table will be displayed. Check boxes for any data source which you wish to include as appoint of view data source. *Point of view data sources will contribute all available records to the output data set, including both matched and unmatched records. Any data source in the query that is not selected as a point of view data source will contribute only matched records.* You may select any number (zero to all) of data sources in the query as point of view data sources. Selecting zero will produce an output file with only matched records included. Selecting all data sources will produce an output file with all records included, both matched and unmatched.

Filtering

Point of View Filtering

Description: Results returned from this query must have entries in at least one of the following Data Sources, if specified.

Show / hide columns

Show 10 entries   Search all columns:

Data Source Name	Data Source Description	Data Source ID	Select POV
BOR CCC Information	ConnSCU CCC	1	☑
BOR CSU Information	ConnSCU CSU	10	☐
DOL Wage Records	DOL Data Source	11	☑
SDE Student Information	State Department Of Education	100	☐

Showing 1 to 4 of 4 entries

9. Once point of view filtering selections have been made, scroll down to and click the "Save Query" button and your query will be submitted and saved. ***Please note that once you save the query no changes to it may be made.*** If you need to make changes to the query it will be necessary to start over and begin a new query. ***If you find that you no longer need a query that you have previously submitted please email the P20 WIN Administrator at*** ConnSCU-P20WIN-Admin@ct.edu ***so that the query can be disapproved.***

Show / hide columns

Show 10 entries   Search all columns:

Field Name	Table Name	Description	CDE	Data Type	Value Domain	Select Field
field name	table name	description				
American Indian Or Alaska Native Ethnicity	StudentResearch *	A person having origins in any of the original peoples of North and South America (including Central America), and who maintains cultural identification through tribal affiliation or community attachment.		BIT		☐
Asian	StudentResearch *	A person having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian Subcontinent. This area includes, for example, Cambodia,		BIT		☐
BirthYear	StudentResearch *	Year portion of Date of Birth, from last reporting district exited		CHAR(4)		☐
BirthYear	StudentReportingDistrict *	Year portion of Date of Birth		CHAR(4)		☑
BlackOrAfricanAmerican	StudentResearch *	A person having origins in any of the black racial groups of Africa.		BIT		☐
DOB	StudentMatch *	YYYYMMDD	dob	CHAR(8)		NA
ELL	StudentResearch *	English language learner at any time during high school, per Nat'l. Gov. Alliance rules		BIT		☐
EntryDate	StudentReportingDistrict *	Date of student's entry into last Facility in PSIS, as YYYYMMDD		CHAR(8)		☑
EntryDate	StudentFacility1 *	Date of student's entry into last Facility in PSIS, as YYYYMMDD		CHAR(8)		☐
ExitDate	StudentReportingDistrict *	Date of student's exit from last Facility in PSIS, as YYYYMMDD		CHAR(8)		☑

Showing 1 to 10 of 58 entries

Please check your submission. Once saved, data queries may not be edited.

Save Query

5.2 MONITORING QUERY STATUS

Users can view the status of any queries that they have requested by clicking on the "Query Management" screen under the "Queries" tab. To view query status execute the following steps:

1. Click the "Queries" tab, which will bring you to the "Query Management" screen
2. Queries that have been approved will be found in the "Approved Queries" table. This table provides the following information about each approved query:
   a. Query Name: Name provided for the query by the requestor.
   b. Description: Description as provided by the requestor.
   c. Owner name: First and last name of the requestor.
   d. Last execution time: Date and time that query was executed. Will be blank if query is awaiting execution.
   e. Download approval status: Provides status of the query as awaiting execution, awaiting approval, or approved. In this case approved refers to approval for download only.

Approved Queries

Click on query name link to view the query.

Query Name	Description	Owner Name	Last Execution Time	Download Approval Status	Query Actions Click the Required Button
BOR Test 1 - 082813	first attempt to see if query process works using Student_Match table only	Kiehne Jan	2013-10-04 01:05:54 PM	Approved	Download
BOR test 09-10-13	simple - hitting the CC & CSU Current City and Current State to see if these fields affected. Current City should be blocked from selection, State from viewing.	Kiehne Jan		Awaiting Execution	
test 09-10-13 number 2	trying again. first 1 saved before complete	Kiehne Jan		Awaiting Execution	
test 10-04-13	download functionality	Kiehne Jan	2013-10-04 01:45:02 PM	Approved	Download
Test 10-04-13	download of just 1 agency data	Kiehne Jan	2013-10-04 03:46:08 PM	Approved	Download
test 10-04-13 #3	test 1 data source with multiple tables. CCC only	Kiehne Jan		Awaiting Execution	
10-18-13 Testing Disabled Tables from DC role	fin_aid tables were disabled through MDE. They are still available through UI for field selction. Will they appear in output?	Kiehne Jan	2013-10-18 10:41:51 AM	Approved	Download
10-18-13 Can DC download data?	data requested only from approved tables. (checking connection to disabled tables bug)	Kiehne Jan	2013-10-18 10:51:40 AM	Approved	Download
10-22-13 Test query - CC data	CSU is disabled, so I'm checking to see if I an execute and download a CC query	Kiehne Jan	2013-10-22 10:23:56 AM	Approved	Download
10-22-13 - second attempt	same fields as prior	Kiehne Jan	2013-10-22 10:51:47 AM	Approved	Download
10-28-13 Test of Download CC only	checking download of CC data. fields from 4 tables: Match, Student, Academic Summary and Placement.	Kiehne Jan	2013-10-28 09:41:07 AM	Approved	Download
11-04-13 CC & CSU test	Request of data from CC & CSU data sources to test download again and get screen shots for Laurel.	Kiehne Jan	2013-11-04 10:51:39 AM	Approved	Download
11-04-13 for screen shots	for screen shots only	Kiehne Jan	2013-11-04 11:44:30 AM	Approved	Download

3. Queries still awaiting approval will be found in the "Queries Waiting for Approval Table" found below the "approved Queries" table.

Query '11-04-13 CC & CSU test' approved

Approved Queries

Click on query name link to view the query.

Query Name	Description	Owner Name	Last Execution Time	Download Approval Status	Query Actions Click the Required Button
BOR Test 1 - 082813	first attempt to see if query process works using Student_Match table only	Kiehne Jan	2013-10-04 01:05:54 PM	Approved	Download
BOR test 09-10-13	simple - hitting the CC & CSU Current City and Current State to see if these fields affected. Current City should be blocked from selection, State from viewing.	Kiehne Jan		Awaiting Execution	
test 09-10-13 number 2	trying again. first 1 saved before complete	Kiehne Jan		Awaiting Execution	
test 10-04-13	download functionality	Kiehne Jan	2013-10-04 01:45:02 PM	Approved	Download
Test 10-04-13	download of just 1 agency data	Kiehne Jan	2013-10-04 03:46:08 PM	Approved	Download
test 10-04-13 #3	test 1 data source with multiple tables. CCC only	Kiehne Jan		Awaiting Execution	
10-18-13 Testing Disabled Tables from DC role	fin_aid tables were disabled through MDE. They are still available through UI for field selction. Will they appear in output?	Kiehne Jan	2013-10-18 10:41:51 AM	Approved	Download
10-18-13 Can DC download date?	data requested only from approved tables. (checking connection to disabled tables bug)	Kiehne Jan	2013-10-18 10:51:40 AM	Approved	Download
10-22-13 Test query - CC data	CSU is disabled, so I'm checking to see if I an execute and download a CC query	Kiehne Jan	2013-10-22 10:23:56 AM	Approved	Download
10-22-13 - second attempt	same fields as prior	Kiehne Jan	2013-10-22 10:51:47 AM	Approved	Download
10-28-13 Test of Download CC only	checking download of CC data. fields from 4 tables: Match, Student, Academic Summary and Placement.	Kiehne Jan	2013-10-28 09:41:07 AM	Approved	Download
11-04-13 CC & CSU test	Request of data from CC & CSU data sources to test download again and get screen shots for Laurel.	Kiehne Jan	2013-11-04 10:51:39 AM	Approved	Download

Queries waiting for approval

Query Name	Description	Owner name
11-04-13 for screen shots	for screen shots only	Kiehne Jan

5.3 DOWNLOADING A QUERY*

*Data Consumers only. Agency Administrators and Tech Admins do not have permission to download query results, even if they are the requestor who has submitted the query.

Once an Administrator has moved the query through its entire workflow the requestor will be able to download the query results. ***No one other than the requestor will be able to download the query results.*** The requestor will be notified that the query has been approved for download via email and onscreen messages.

To download a query execute the following steps:

1. Click the "Queries" tab which will bring you to the "Query Management" screen
2. Identify the targeted query on the "Approved Queries" table and click the "Download" button which will bring you to the "Summary" screen

P20 WIN: CONNECTICUT'S PRESCHOOL THROUGH 20 AND WORKFORCE INFORMATION NETWORK

HOME   DATA SOURCES   QUERIES   FAQ

QUERY MANAGEMENT   CREATE NEW QUERY

Query '11-04-13 for screen shots' results available for download ☑
Query '11-04-13 for screen shots' approved ☑
Query '11-04-13 CC & CSU test' results available for download ☑
Query '11-04-13 CC & CSU test' approved ☑

Approved Queries

Click on query name link to view the query.

Query Name	Description	Owner Name	Last Execution Time	Download Approval Status	Query Actions Click the Required Button
BOR Test 1 - 082813	first attempt to see if query process works using Student_Match table only	Kiehne Jan	2013-10-04 01:05:54 PM	Approved	Download
BOR test 09-10-13	simple - hitting the CC & CSU Current City and Current State to see if these fields affected. Current City should be blocked from selection, State from viewing.	Kiehne Jan		Awaiting Execution	
test 09-10-13 number 2	trying again. first 1 saved before complete	Kiehne Jan		Awaiting Execution	
test 10-04-13	download functionality	Kiehne Jan	2013-10-04 01:45:02 PM	Approved	Download
Test 10-04-13	download of just 1 agency data	Kiehne Jan	2013-10-04 03:46:08 PM	Approved	Download
test 10-04-13 #3	test 1 data source with multiple tables. CCC only	Kiehne Jan		Awaiting Execution	
10-18-13 Testing Disabled Tables from DC role	fin_aid tables were disabled through MDE. They are still available through UI for field selction. Will they appear in output?	Kiehne Jan	2013-10-18 10:41:51 AM	Approved	Download
10-18-13 Can DC download data?	data requested only from approved tables. (checking connection to disabled tables bug)	Kiehne Jan	2013-10-18 10:51:40 AM	Approved	Download
10-22-13 Test query - CC data	CSU is disabled, so I'm checking to see if I an execute and download a CC query	Kiehne Jan	2013-10-22 10:23:56 AM	Approved	Download
10-22-13 - second attempt	same fields as prior	Kiehne Jan	2013-10-22 10:51:47 AM	Approved	Download
10-28-13 Test of Download CC only	checking download of CC data. fields from 4 tables: Match, Student, Academic Summary and Placement.	Kiehne Jan	2013-10-28 09:41:07 AM	Approved	Download
11-04-13 CC & CSU test	Request of data from CC & CSU data sources to test download again and get screen shots for Laurel.	Kiehne Jan	2013-11-04 10:51:39 AM	Approved	Download
11-04-13 for screen shots	for screen shots only	Kiehne Jan	2013-11-04 11:44:30 AM	Approved	Download

3. Scroll down to the "Download Data Set" button at the bottom of the screen

Results Summary

Query execution details

Query Id	174
Query Name	11-04-13 CC & CSU test
Execution Timestamp	2013-11-04 10:51:39 AM
Execution Time	195 sec.

Matching Details

P20 WIN Data Sources cover diverse but often overlapping populations. Each P20 WIN Data Source includes a single table (the P20 WIN "Persons" table) that contains listing of individuals represented in the data source. P20 WIN uses these listings and WIN via probabilistic matP20 WINg. In doing so P20 WIN produces an index of unique individuals with references ("P20 WIN Record Locator IDs") to the actual data records from one or more data sources.

matP20 WINg details by number of persons

The table below summarizes the populations in P20 WIN including statistics on individuals represented in more than one data source.

Data Source	Number of Individuals	Number of Records	Individuals across all the Data sources
BOR CCC Student Information	0	250852	0
BOR CSU Student Information	0	98258	

Matching methodology
The population statistics above are produced by CHIN's Record Linkage engine. The probabilistic matching conducted by this engine is dependent on specific configuration parameters:
Algorithm TPA(FCED)
Threshold 0.1

Unit of Analysis

CHIN is designed to use the person as its primary unit of analysis. Data included in CHIN comes from many sources and has diverse structure and content. In each data source, CHIN identifies a single table or listing as that source's primary records repres and a set of core identifying and demographic fields that do not change over time (DOB, Sex, Race/Ethnicity, etc.). Some CHIN data sources do not have a single unique record for each person but rather are more of a 'case history' style where each rec

In both cases, CHIN compares the identifying information in each 'Person' record with identifying information from other records in the same data source and in all other data sources in CHIN. The comparison is done via a multi-stage hierarchical cluste form a tree (called a dendrogram). When the process completes, each cluster represents a unique real-world individual with one or more corresponding records in CHIN data sources, and the cluster is randomly assigned a CHIN Person ID. The threshold

Each 'Person' record in a CHIN data source may be related to other information pertaining to that individual such as case histories, medication histories, and intervention or diagnosis information. Such other information is typically stored in separate tab and available for query.

As mentioned above, some CHIN data sources are not designed with a single unique record for each person, and even those that are may have duplicates due to human error during data entry. This leads to some CHIN clusters including multiple 'perso CHIN is designed to represent and provide access to the record-level data in an integrated fashion, we leave it up to the user to determine how best to make use of such records.

Presence of each Identifying Field by Data Source with % of records populated

The table below displays the availability of data for each Identifying Field in the data sources.

Data Source	first name	last name	social security number	gender	zip code	date of birth	sasid for p20 win	High School Code for p20win	middle name
BOR CCC Student Information	Y(100%)	Y(100%)	Y(98%)	Y(99%)	Y(99%)	Y(2%)	Y(97%)	Y(75%)	
BOR CSU Student Information	Y(100%)	Y(100%)	Y(97%)	Y(100%)	Y(99%)	Y(8%)	Y(59%)	Y(85%)	

Download dataset

4. Click the "Download Data Set" button and click open or save in the file download box to open or save the file(s)

   Note: For more information on query output files please see Appendix A: Understanding Query Output

Appendix A: Understanding the Matching Process

The P20 WIN system uses a probabilistic matching algorithm (Pi) to match records across data sources. This algorithm, developed at the University of Connecticut Booth Engineering Computing and Advanced Technology (BECAT), allows for records to be matched at the individual level without the need for a common unique person identifier.   Instead Pi utilizes multiple identifiers present in the data sets that are being linked. To match records across data sets Pi calculates edit distances (number of differences in the characters) between the identifiers of the records to determine whether or not records are considered to be from the same individual. If the edit distance is above a set threshold Pi will determine the records to be from different individuals. If the edit distance is below a set threshold Pi will determine that the records are from the same individual. Pi references a nickname database and can account for some common misspelling in order to improve matching outcomes.

For a more information about Pi in the P20 WIN System contact the P20 WIN Administrator at ConnSCU-P20WIN-Admin@ct.edu.

Appendix B: Understanding Query Results Files

The P20 WIN system returns data to users in a file or set of output files which will contain the following information:

1. Summary information about the data including data elements requested and whether value domain information will be included in the results files
2. IDs to link individuals across data sources and among parent-child data files
3. Value domain information to understand codes used the data sets when applicable
4. Data requested from the main "person" table from the data source(s) queried
5. Data requested from "child" tables if requested

For a more information about understanding query results contact the P20 WIN Administrator at ConnSCU-P20WIN-Admin@ct.edu.