Submitting a Canned or Ad Hoc Query to the cul-folio-analytics GitHub repository

1 - Make sure your query meets the specifications described on the Preparing a Canned Report or Ad Hoc Report for cul-folio-analytics page.

2 – Create an entry for the report on the FOLIO Canned Reports Directory at

https://confluence.cornell.edu/display/folio/FOLIO+Canned+Reports+Directory

Under "All Reports," pick the next CR number or AHR number and add a row at the end of the All Reports table. Enter all the information listed in the columns. Duplicate this entry in the appropriate functional area reports section, e.g., Access Services reports. Right next to your CR or AHR number, enter the words "in progress" in parantheses.

| CR208 (in progress) | 5/5/23 | identifying_DVDs | This query identifies DVDs. | | NEW | jl41 |

4 – Log into the cul-folio-analytics repository on GitHub

https://github.com/cul-it/cul-folio-analytics

5 - If you have not yet created your own fork (copy) of this repository, create a fork. Click the Fork button at the top right corner of the page, choose Create a new fork, then click the green Create Fork button to create your fork.
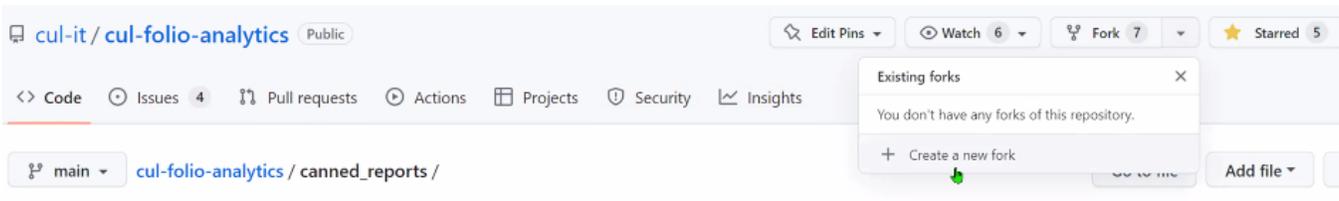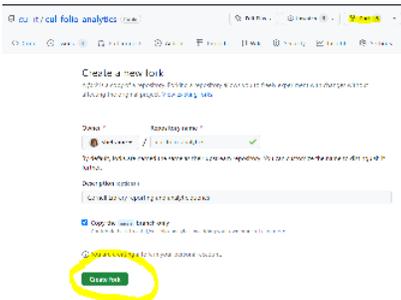
After creating your fork, you should see a new named fork of the main repository, with your name, a slash, and the name of the repository, as shown below. You can confirm you are in your fork of the repository on the top left corner of your page.

7 - If you have already created a fork, you just need to synchronize the files from the main directory to your own fork before you begin working. If your fork is behind on commits, click the Sync fork drop down


On the other hand, if your repository is up-to-date, you don't need to do anything.
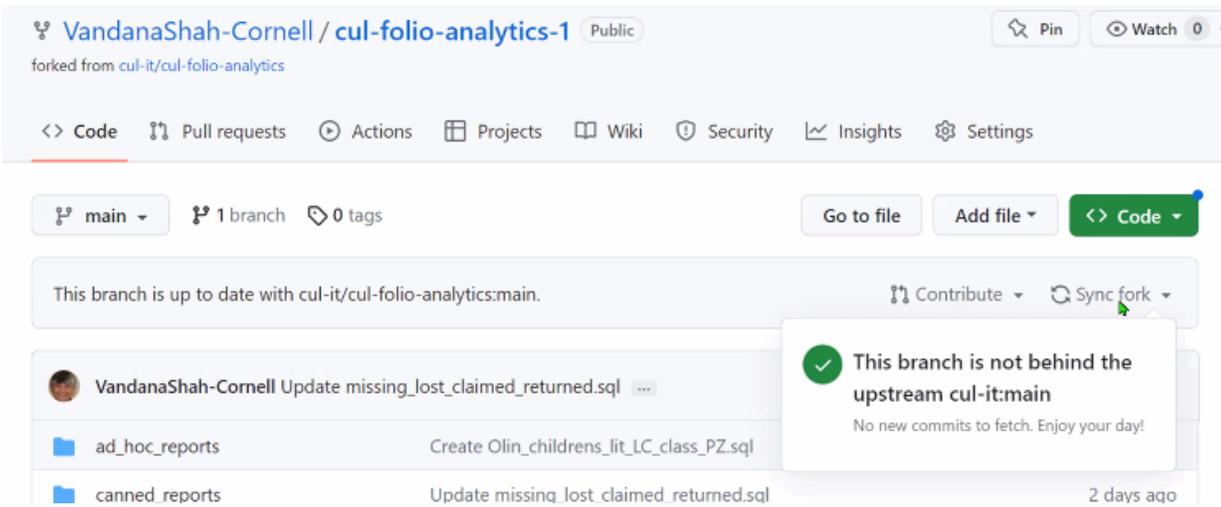
7 - Working from your own fork, open the canned_reports or ad_hoc directory, choose Create new file from the top right corner.
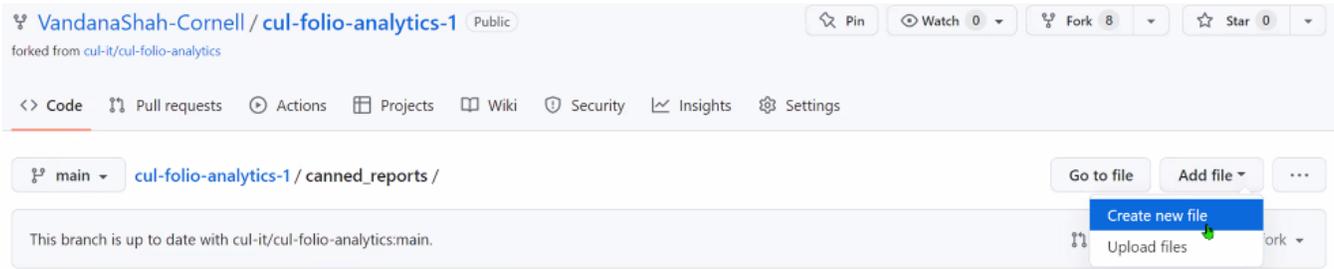

8 - Enter the CR or AHR number for this query followed by a Slash (/) mark, then enter the name of the query you will be submitting followed by an .sql file extension. (The .sql file extension ensures that the file retains the SQL format.) Make sure the name of the query includes underscore characters between each of the words, and keep the name as short as you can (e.g., loan_count.sql). The Slash mark creates a new directory for this query. In the Edit new file window, paste the code of your entire query. Hit the Return key to enter the new directory, the name of the query file, and the query code you will be submitting.
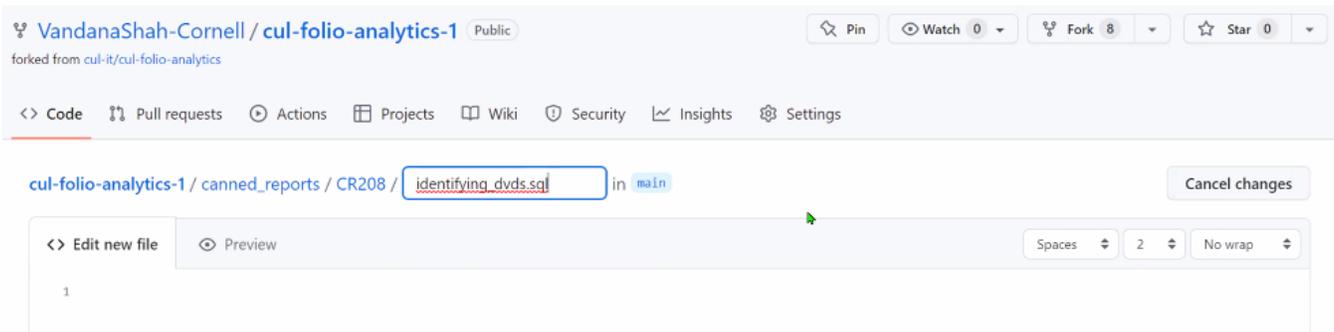
9. Scroll down to the bottom of the page. Scrolling is a little confusing. Keep in mind that there is a scroll bar for the window, as well as a separate scroll bar for the query code.

In the Commit new file message, enter any addition instructions that may be helpful for others to use to understand the changes you are making to this file. This is most useful after you have done your first commit of the file and you subsequently go back to make edits. When you are done, click Commit new file.
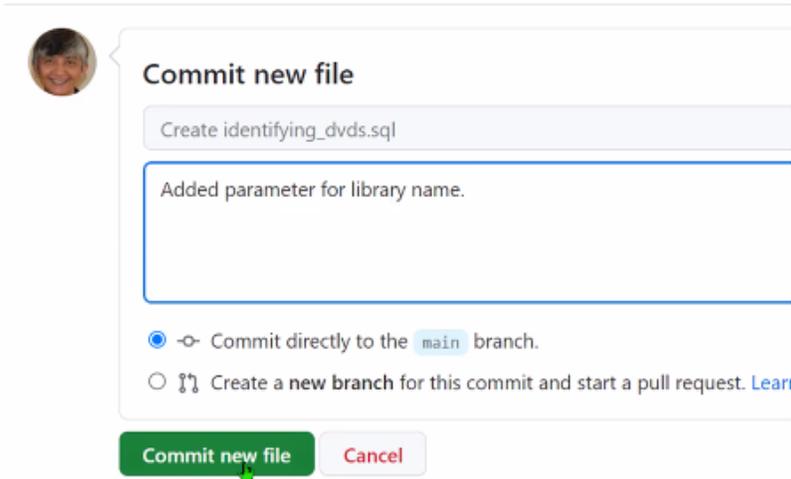
At this point, you have updated the code on your own fork. You must submit a Pull Request to have the code merged to the main branch of the repository.

10. To submit a Pull Request, click on Pull requests near the top of your page.
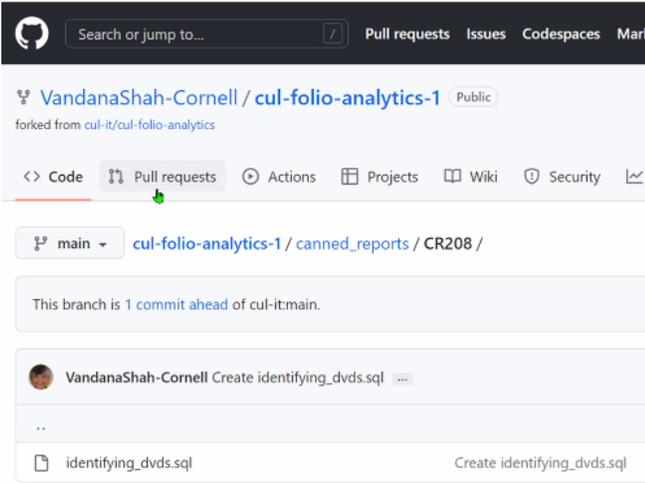
Click New pull request.
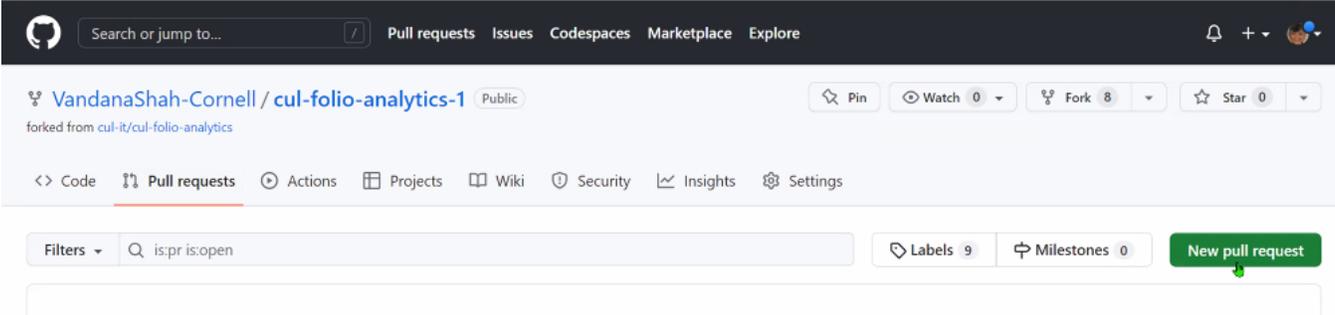
Click Create pull request

Scroll down to the bottom of the window and click Create pull request again. Note that you have another opportunity add comments if you wish.

You should now see a message confirming that you have created your Pull Request. You are done submitting your code.

If you scroll down more, you will see a button that says Close pull request. Do not click that button! If you click that button, you will have to start your Pull Request all over again.

10 - At this point, you need to wait for your query to be reviewed and merged into the main code repository. (Feel free to nudge the repository admin if you need it merged right away.) The repository admin will also update the Confluence page to show the correct CR or AHR number after the code has been reviewed and merged.

11 – Congratulations, you have submitted your query! :)