

PeopleSoft

Query Manager Basics

PeopleSoft Query

The PeopleSoft Query is an end user reporting tool that allows you to extract precise information from the PeopleSoft database without having to write SQL code.

Database Elements:

- **Tables (Records):** Tables are composed of columns and rows. These tables are called **Records** in PeopleSoft.
- **Columns (Fields):** Columns are single pieces of information for each row, they are the fields (Headers) in the database.
- **Rows (Field Data):** A row contains all the information for a unique combination of key values on the table, they are the data that is contained in the fields.
- **Keys:** Keys are one or more columns of a table that make each row unique from the other.

Process Summary

PeopleSoft Query

1. Database Elements

Query Manager

1. Query Manager Provides
2. Methods to Obtain Info
3. Navigation
4. Search By
5. Action
6. Other Page Features
7. Manager Pages
8. SQL View Basics

Query Manager

Query Manger is the administrative area in PeopleSoft where you can build, search for, organize and edit queries.

Query Manager Provides:

- The ability to run queries from a Web interface
- The ability to easily retrieve user-requested information
- The ability to easily access and modify existing queries
- The option to export data to various report types

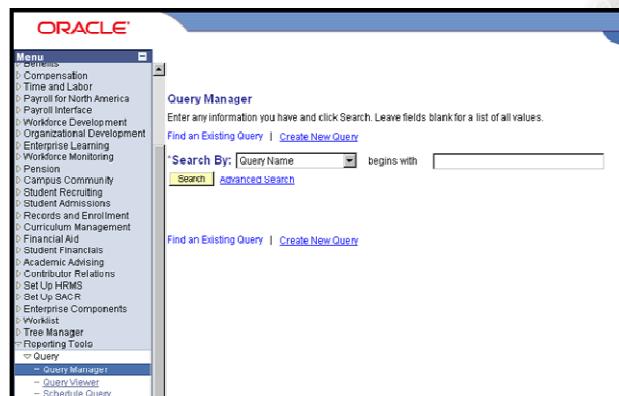
Figure 1

Methods to Obtain Information

- Filtering data by using criteria
- Creating expressions
- Use multiple record joins to obtain detailed information that is not found in a single record
- Using runtime prompts, which enables users to enter values at runtime to obtain specific results

Navigation

1. Select **Reporting Tools > Query > Query Manager** (Figure 1).



Search By

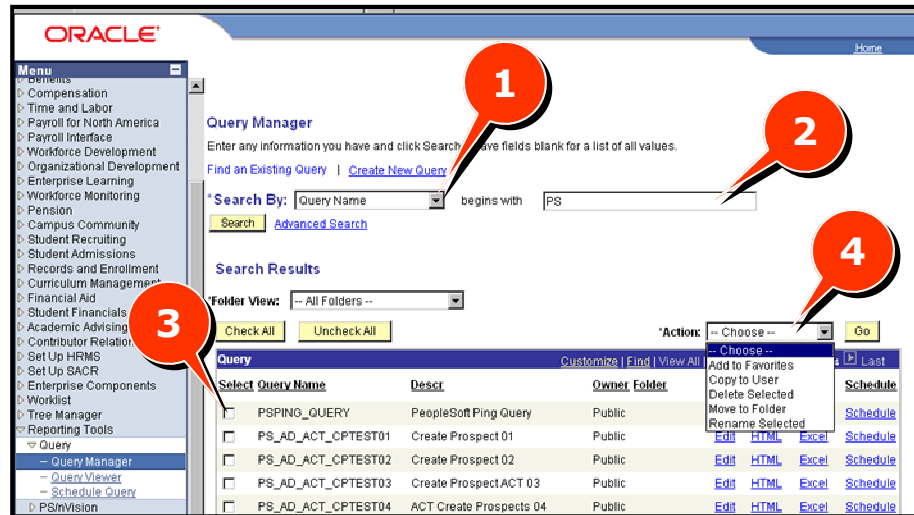
You can Search by **Query Name, Description, Record Name, Field Name, Access Group Name, Folder Name, Query Type and Owner** (Figure 2, 1).

Figure 2

You can conduct smart searches by typing in a few letters in the **begins with** box and clicking **Search** (Figure 2, 2).

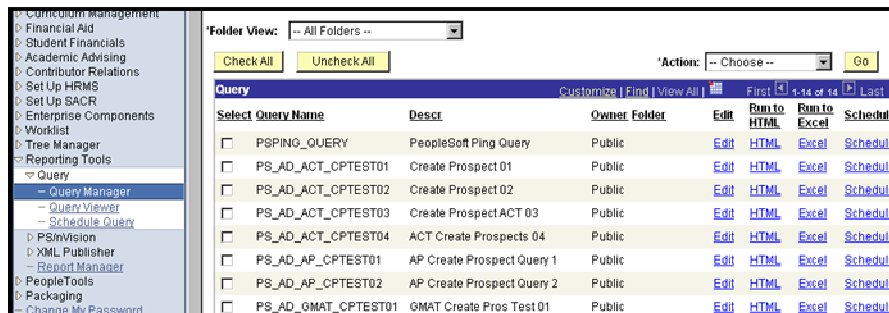
Action

There are five different Action options available after you get the results of your search. Click on the **Select** box (Figure 2, 3) of the particular query. From the **Action** drop-down (Figure 2, 4) choose to **Add to Favorites, Copy to User, Delete Selected, Move to Folder** or **Rename Selected**.



Other Page Features:

- **Folder View:** Displays queries by folder name
- **Select:** Select this check box to flag a query for an action.
- **Check All and Uncheck All:** Click these buttons to select or deselect all queries that are in the search list.
- **HTML:** Select this link to run a query to HTML format.
- **Excel:** Select this link to run to Excel.
- **Schedule:** Select this link to access the Process Scheduler Request Page and set particular date and time to run the query.



Query Manager Pages

The pages of Query Manager enable you to tailor queries to retrieve data that is specific. There are 9 tabs that bring you to each of the pages. The most frequently used tab is the **Fields** tab.

- **Records:** Select the records to use in the query. You must select at least one record before you can create and save a query (Figure 3).

- **Query:** Select the fields that you need for the query. You must select at least one record before you can create and save a query(Figure 4).
- **Expressions:** Create formulas to use with the query (Figure 5).
- **Prompts:** Create runtime prompts (drop-down , look up or text fields) (Figure 6).
- **Fields:** View, edit sort, and reorder fields that appear in a query (you can access most of the other areas from the Fields page (Figure 7).
- **Criteria:** Filter data to retrieve only those rows that you need to see (Figure 8).
- **Having:** Create criteria for fields that use aggregate functions (Figure 9).
- **View SQL:** View the SQL that is generated when the query is created (This SQL can be copied into other programs if needed) (Figure 10).
- **Run:** View the results of the query (Figure 11).

Figure 3

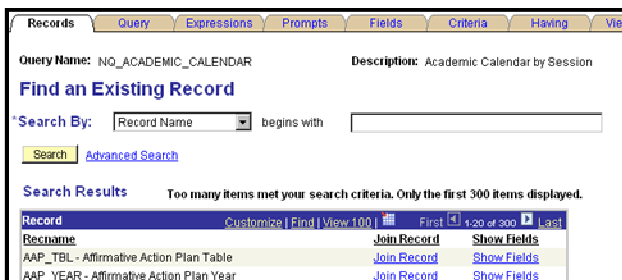


Figure 4



Figure 5



Figure 6

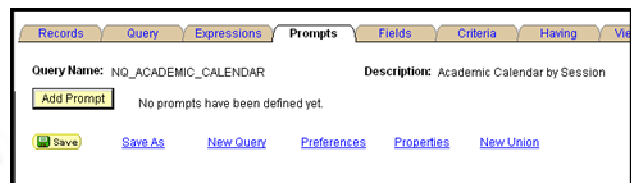


Figure 7

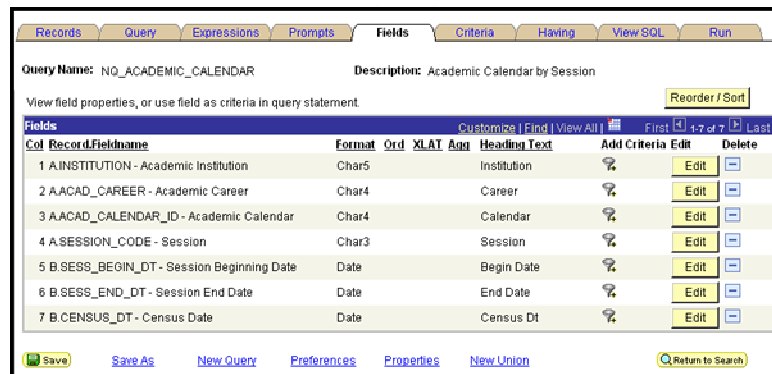


Figure 8

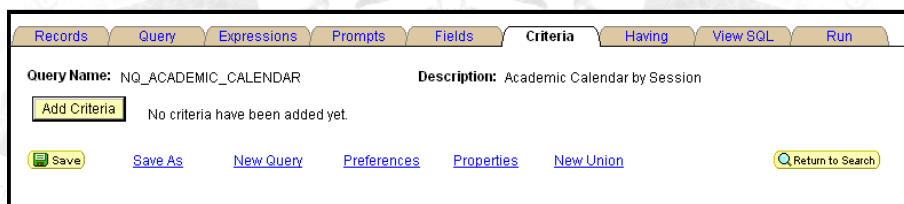
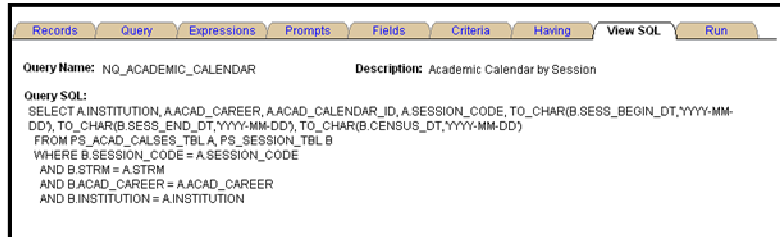


Figure 9



Figure 10



SQL View Basics

- **SELECT:** displays fields you selected separated by commas.
- **FROM:** Shows you the tables the fields you chose are from, separated by commas.
- **WHERE:** Joins criteria = sign shows how tables are linked together, shows filters (Criteria) and so much more
- **ORDER BY:** Sort, shows the position of the fields across the page

Figure 11

	Institution	Career	Calendar	Session	Begin Date	End Date	Census Dt
1	TOWSN	UGRD	ACAL	1	08/28/2001	12/19/2001	
2	TOWSN	UGRD	ACAL	1	08/31/2000	12/19/2000	
3	TOWSN	UGRD	ACAL	1	01/02/2001	01/02/2001	
4	TOWSN	UGRD	ACAL	1	01/29/2001	05/19/2001	
5	TOWSN	UGRD	ACAL	1	05/28/2001	08/31/2001	
6	TOWSN	UGRD	ACAL	1	01/02/2002	01/23/2002	
7	TOWSN	UGRD	ACAL	1	01/28/2002	05/21/2002	
8	TOWSN	UGRD	ACAL	8W1	06/07/2002	07/28/2002	
9	TOWSN	UGRD	ACAL	1	08/28/2002	12/20/2002	
10	TOWSN	UGRD	ACAL	1	01/02/2003	01/22/2003	
11	TOWSN	UGRD	ACAL	1	02/01/2003	05/20/2003	
12	TOWSN	UGRD	ACAL	1	05/27/2003	08/08/2003	06/02/2003
13	TOWSN	GRAD	ACAL	1	08/31/2000	12/19/2000	
14	TOWSN	GRAD	ACAL	1	01/02/2001	01/02/2001	
15	TOWSN	GRAD	ACAL	1	01/29/2001	05/19/2001	
16	TOWSN	GRAD	ACAL	1	05/29/2001	08/08/2001	
17	TOWSN	GRAD	ACAL	1	08/28/2001	12/19/2001	
18	TOWSN	GRAD	ACAL	1	01/02/2002	01/23/2002	
19	TOWSN	GRAD	ACAL	1	01/28/2002	05/21/2002	
20	TOWSN	GRAD	ACAL	1	05/27/2003	08/08/2003	06/02/2003