# Peoplesoft Query: T.U. Department Data Primer

## What is PS Query?

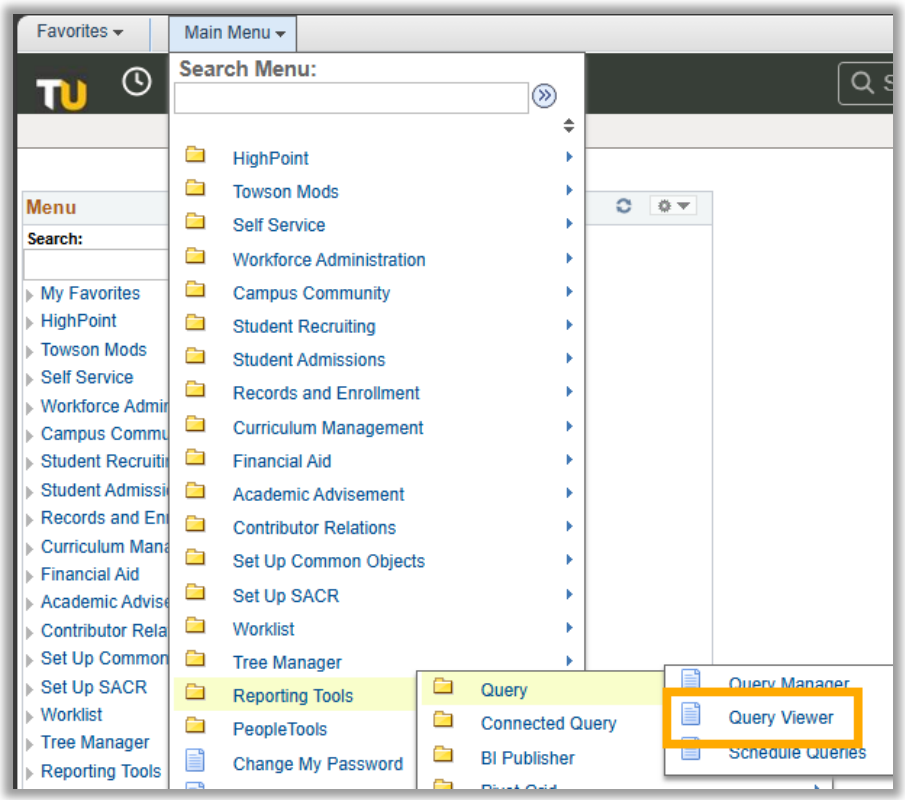
- A query is simply a question, or the act of posing a question.
- PS Query refers to the PeopleSoft tool that can provide specific data about our students, classes and programs that otherwise would be cumbersome, if not impossible to gather.

## Peoplesoft Query Options

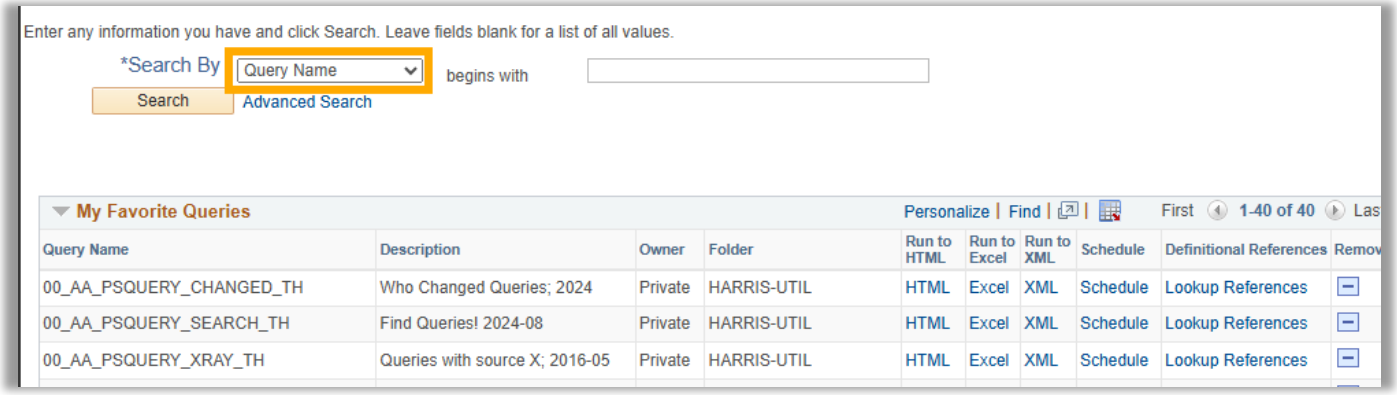
### Query Viewer

Allows approved TU staff to:

- Run existing queries and, perhaps, even schedule it to run on a specific day and time
- Export the results for use in other apps, like MS Excel
- Favorite queries so that they're readily accessible instead of having to search for them every time



# Query viewer: Search Screen

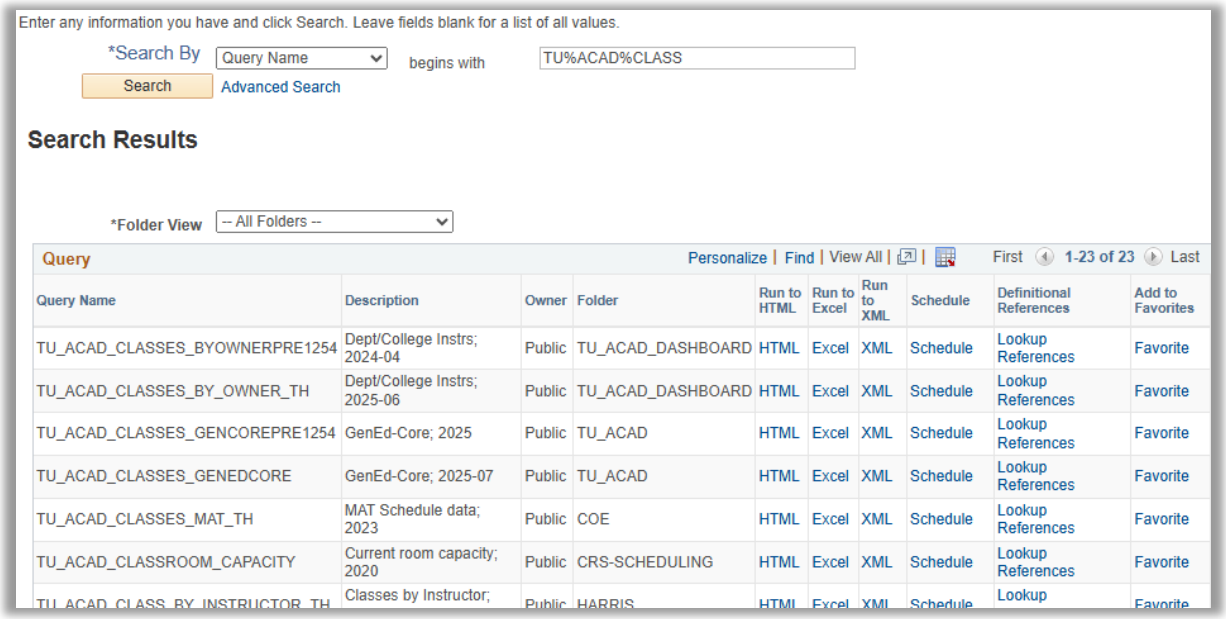



1. Notice, in the image above, queries are *already* listed here. These were tagged as FAVORITES. More on this below!

2. Explore the **SEARCH BY** drop down to see options other than Query Name

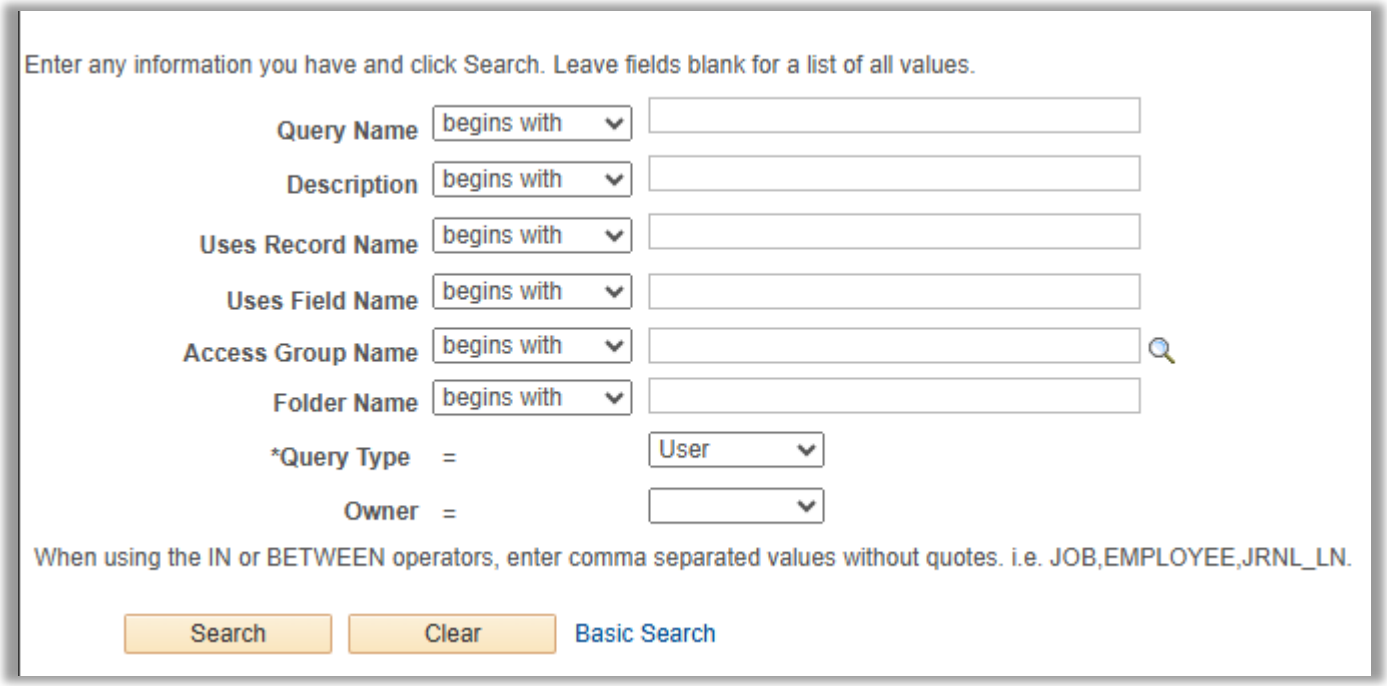
3. It's helpful to know that the SEARCH box *allows use of the % character wildcard!*
   The **%** is a flexible friend in many query prompts, but you can use it in searches, too!
   **N.B. See the last page for more important tips!**

4. While the ADVANCED SEARCH link leads to more flexible and powerful search options, try the following in the "*begins with*" box: *tu%acad%class*




Notice the FAVORITE link in the far-right column next to each result? *Selecting its link will cause that query to appear as soon as you navigate to Query Viewer!*

# Query viewer: Advanced search




## Advanced Search:

1. Allows you to use *multiple* search parameters. The more employed, the more focused the search.

2. RECORD NAME refers to a database table included in the query and FIELD NAME, a field within any table included. Only use these if you are familiar with behind-the-scenes tables/fields.

3. ACCESS GROUP is about query permission categories. Most users do not use this, either.

4. FOLDER NAME – Some queries have been organized into folders, and you can find them quickly if you know the name. This can be useful in finding queries for specific departments/colleges/offices. Example – begins with: TU_ACAD will results in a list of often used academic department queries.

5. OWNER simply refers to whether the query is PUBLIC or PRIVATE, not to whom the query belongs or who created it. You will
   Private queries can only be seen by its creator unless it has been "sent" to another user by said creator.

6. *Don't forget:* The % wildcard works in these searches, too

## Still can't find a query to fit the bill?

It may be time to Request a Report.
Point your internet browser to https://mytu.towson.edu, see Additional Links (sidebar) & select Request a Report. Include as much information about who needs data, what exactly is needed and the intentions for said data.

# Run options

**Search Results**

*Folder View -- All Folders --

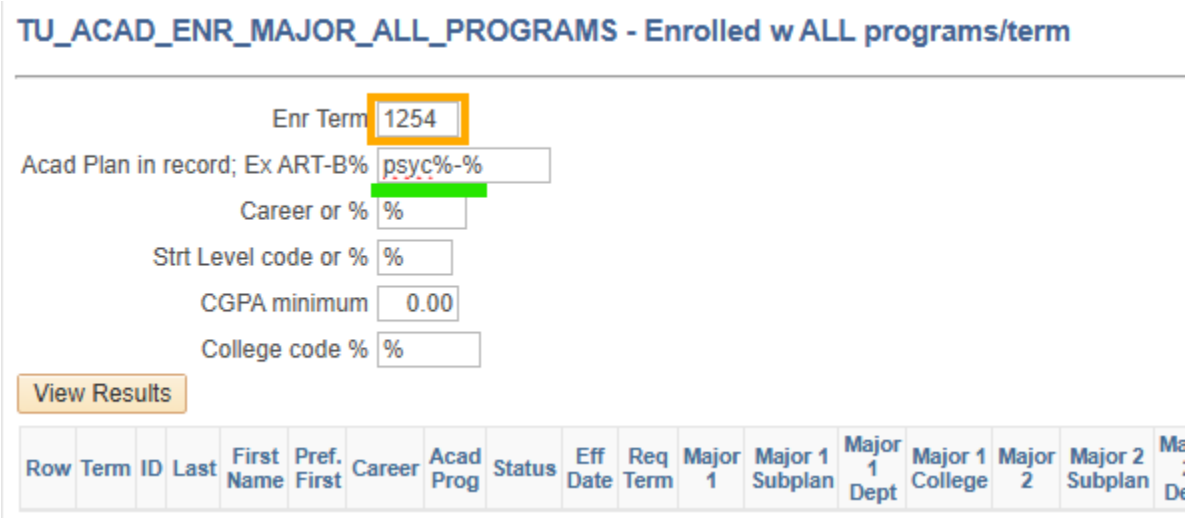
Query | Personalize | Find | View All | First 1-2 of 2 Last

| Query Name | Description | Owner | Folder | Run to HTML | Run to Excel | Run to XML | Schedule | Definitional References | Add to Favorites |
|---|---|---|---|---|---|---|---|---|---|
| TU_ACAD_CLASS_TSEM | TSEM Descriptions by Term | Public | TU_ACAD_QUERIES | HTML | Excel | XML | Schedule | Lookup References | Favorite |
| TU_ACAD_CLASS_TSEM_PRE1254 | TSEM Descriptions by Term | Public | TU_ACAD_QUERIES | HTML | Excel | XML | Schedule | Lookup References | Favorite |

## Now that you have found a query to run, it's important to understand the options available:

- **HTML** – Highly recommended! Displays results in a browser tab with the option to Download results to Excel, CSV or XML formats
- **EXCEL** – Results are pushed directly out to the Excel program *without any preview*
- **SCHEDULE** – Redirects you to the SCHEDULED QUERY process set up
- **DEFINITIONAL REFERENCES** – May show processes used by this particular query
- **FAVORITE** – As previously mentioned, adds the query to your Favorite list, so it appears whenever you navigate to the Query Viewer page.
  N.B. Choose wisely or you'll end up with a default query list so cumbersome that you'll default to using the Search to find them instead.

# Query Prompts




## Many of our queries are Term-driven, particularly those created for academic departments (TU_ACAD%).

The code for these Terms is deciphered as follows:

- **The first digit is always 1**
- Second and third digits match the **last two digits of the year**.
  Example: 25 = 2025
- The fourth digit identifies **the Term itself**
  - Minimester = 1
  - Spring = 2
  - Summer = 3
  - Fall = 4

## Prompts for Major (MAJ), Minor (MIN) or Academic Plan:

- Major/MAJ, Minor/MIN, and Plan are interchangeable since the codes for these reside in a single database field – Academic Plan.
- Majors have 4 characters, followed by a hyphen (-) with an abbreviation suffix to indicate the program. Example: BIOL-BS, or to ensure you don't exclude BIOL-BA, enter biol-b% in the prompt. Want to include graduate level plans? BIOL-% will cover all the programs.
- Minors just use 4 characters. Ex: BIOL
- Concentrations and Tracks, however, are stored elsewhere in Subplans

## Career will either be UGRD (undergraduate) or GRAD (graduate level)

A wildcard-enabled prompt will allow you to use % to get both.

## “Strt Level” refers to the student’s “class” level at the beginning of the term (unless otherwise noted):

- 00 = Non-Degree Undergraduate
- 10 = Freshman
- 20 = Sophomore
- 30 = Junior
- 40 = Senior
- 50 = Post-Baccalaureate
- GR = Graduate

College codes:

- CBE = Business & Economics
- CFA = Fine Arts & Communication
- CHP = Health Professions
- COE = Education
- CSM = Fischer College of Science & Mathematics

## Of course, these won’t be the only prompts you will encounter.

When this happens and you aren’t familiar with the codes

1. If they allow the % wildcard, try it and see what you get
2. Check with more experienced staff and/or reach out, via email, to the query’s creator

# PS Query Tips & Hacks

*We've already mentioned the wildcard character (%) that allows you to include keywords/characters to shortcut your query searches and provide flexibility in many query prompts, but here are some other useful bits.*

1. Query names are supposed to follow a convention:
    a. All "Public" queries should have a standard prefix: **TU_**
    b. As indicated, all character segments are separated by an underscore (_)
    c. The next segment usually represents the audience the query is meant to serve. It can be an office, department, college, etc. *Some examples:*
        i. **TU_ACAD_**
        Are meant *for use by any of the T.U. academic departments*
        ii. **TU_ADV_**
        Built for use by *Academic Advising, Retention and Completion*.
        Most, if not all should also be identified by the *ADVISING folder*.
        iii. The mid-section usually tries to identify the type of students or courses the query is designed to find (a challenge given query name and its description are limited to 30 characters each).
            1. CLASS refers to sections in a given Term
            2. COURSE or CRSE refers to Catalog data instead
            3. ENR indicates a query focused on enrolled students
        iv. If room allows, you may find queries where there is a suffix
            1. Two characters usually indicates its creator. Ex. _TH = Tom Harris
            2. Year may indicate a major revision (you may find a similar name without the year or original creator's initials)!

2. Query Descriptions:
    a. Like Query Names, are limited to 30 characters- Again, you may need to decipher
    b. A year at its end should indicate the last time it underwent a coding revision
3. *If you ever notice a query with a Folder name that includes* "**DEV**" do not use it until you contact its creator. The creator's name should begin the Folder name. Ex: HARRIS-DEV
4. *If you cannot find a query* (even using the % wildcard)
    a. Consider searching for the Folder in which it may be organized
    b. There is a possibility that the query has
        i. Been removed
        ii. Includes sensitive data tables for which your account does not have permission.
5. Favorite queries – Do, but limit them to those you know you will frequently reuse.
   Adding too many finds you with a list so long that you end up using Search anyway!
6. Prompt entries – *do not have to be entered in all capital letters* (most of the time).
   Well-constructed queries will all you to simply type in lower-case responses for prompts.
7. *If you get unexpected results*
    a. Do not automatically assume something is wrong with the query.
    Carefully examine how you answered the prompts (will % wildcard help?)
    b. Check for a date (in the name/description). Does it appear it's been modified recently?