I. INTRODUCTION .............................................................................................................................3
   OVERVIEW ........................................................................................................................................3
   OBJECTIVES ..................................................................................................................................3

II. REVIEWING THE TYPES OF QUERIES ....................................................................................4

III. BASIC QUERY CONCEPTS ...........................................................................................................5
   OVERVIEW ........................................................................................................................................5
   RUNNING A QUERY: BROWSER ............................................................................................................5

IV. FINDING AND SELECTING AND RUNNING A PREDEFINED QUERY .......................................6

V. CREATING A BASIC QUERY .......................................................................................................7
   TERMINOLOGY ..................................................................................................................................7
   CREATING A BASIC QUERY .............................................................................................................7

VI. CREATING A QUERY USING MULTIPLE TABLES ....................................................................14
I. Introduction

Overview
The Query Designer provides PeopleSoft users with a simple, intuitive way to create and run queries. The results can be viewed online or exported to an Excel spreadsheet or a CSV text file.

You will learn basic functions of the query tool and how to create queries: selecting specific records and fields. You will learn how to modify column headings and how to retrieve the short or long descriptions for the translate value rather than the field name.

Once you know the basics, you will learn how to retrieve information based on criteria requirements such as equal to, greater than, in a list, between and like. You will also learn how to add runtime prompts. Runtime prompts give the user the ability to enter specific values for a designated field. The values are used as criteria for retrieving the information for your report. You will learn to create queries using effective dates because PeopleSoft uses effective dating in order to show data in a historical perspective.

In addition, you will explore how to create complex queries using multiple tables using predefined joins.

Objectives
• Reviewing Query Types
• Finding, Selecting and Running a Predefined Query
• Create Simple Queries
• Specify Criteria for Retrieving Data
• Creating Complex Queries using Multiple Tables
• Sorting and Ordering Query Results
II. Reviewing the Types of Queries

PeopleSoft Query provides the following different types of queries:

**User queries**
Create and run queries to retrieve data from the database directly from Windows-based Query Designer, or the web-based Query Manager/Query Viewer applications.

**Process queries**
Write queries that are intended to run periodically by batch processes, most likely using PeopleSoft Application Engine and the Query API (application programming interface).

**Role queries**
Write queries that PeopleSoft Workflow uses to determine to whom to send emails, forms, or worklist entries.
III. Basic Query Concepts

Overview
You will learn the basic features and concepts of Query, including how to run a predefined query, how to create a query from one record, how to modify your view preferences and how to manipulate data in your query.

Running a Query: Browser
PS query provides powerful querying capabilities within the PeopleSoft Internet Architecture. Through your browser you can define and modify queries, run queries and schedule queries to be run on a regular basis.

The query viewer is the primary place for the end user to run and view queries. Once the query is found you can choose to run the query immediately in the browser or schedule it to be run at a later time.
IV. Finding and Selecting and Running a Predefined Query

Step 1. Navigate to the Query Manager

Reporting Tools > Query > Query Manager
V. Creating a Basic Query

*Terminology*

**Record Definitions**
The record definitions are the design specifications that determine the structure of your PeopleSoft application data tables and online processing.

**Tables**
The table is made up of columns and rows. Columns determine how the data will be stored. Rows represent the actual data stored in the database.

**Creating a Basic Query**

**Step 1.** Navigate to the Query Manager

[Oracle Interface Screenshot]

- Reporting Tools > Query > Query Manager

- Query Manager
  - Enter any information you want and click Search. Leave blank boxes for all undesired values.
  - Find an Existing Query | Create New Query
  - *Search By:*  [DisplayName]  begin with
  - Search | Advanced Search

- Find an Existing Query | Create New Query
Step 2. Click on Create New Query

This will open the Find an Existing Record search page where you select the table that you want to use.

If you weren’t sure of the name of the table, you can leave that field blank. This is not the most efficient way to search because it will bring up the 1st 300 tables.

Step 3. Enter UW_HR in the begins with box and click on the Search icon.

Step 4. Find UW_HR_ALLJOB_VW table and click on the Add Record icon.

All the fields in the table will be available for selection.
Step 5. Choose the following fields:

BUSINESS_UNIT
DEPTID
EMPLID
NAME
EMPL_RCD
HIRE_DT
EXPECTED_END_DATE
HR_STATUS
EMPL_CLASS
ACTION
ACTION_REASON
JOBCODE
UW_JOBCODE_DESCR
COMPRATE
FTE

Step 6. Click on the Fields tab
Step 7. Click on the Add Criteria icon for HR_STATUS

The Edit Criteria Properties page is displayed.

Expression 1

Choose Record and Field

Record Alias:Fieldname:

A.HR_STATUS - HR Status

'Condition Type:

equal to

Expression 2

Define Constant

Constant: 

The Edit Criteria Properties page is displayed.

Step 8. Enter HR Status in the Constant box and click on the OK icon.

Be sure to enter the HR status as it is configured in the system, as PeopleSoft query is case sensitive.
Step 9. Click on the Add Criteria icon for EMPL_CLASS
Step 10. Enter your employee classification in the Constant box and click on the icon.

Step 11. Click on the Run tab.

The query results will automatically be displayed in a grid format.
The results of your query can now be saved as an Excel spreadsheet.

**Step 12.** To save the query click on the ![Save](save_icon.png) icon.

**Enter a name to save this query:**

- **Query:** PRJ_EMPL_RPT
- **Description:**
- **Folder:**
- **Query Type:** User
- **Owner:** Private

![OK](ok_icon.png)  ![Cancel](cancel_icon.png)

**Step 13.** Enter a query name and click on the ![OK](ok_icon.png) icon.

Queries can be saved Private or Public queries. If you are saving the query as a public query, you will want to use the naming conventions developed by the organization.
VI. Creating a Query using Multiple Tables

Step 1. Navigate to the Query Manager

Reporting Tools > Query > Query Manager
Step 2. Click on Create New Query

This will open the Find an Existing Record search page where you select the table that you want to use.

Step 3. Enter UW_HR in the begins with box and click on the Search icon.

Step 4. Find UW_HR_ALLJOB_VW table and click on the Add Record icon.
Step 5. Choose the following fields:

- BUSINESS_UNIT
- DEPTID
- EMPLID
- NAME

Step 6. Click on the Records tab. Find UW_HR_ADDRES_VW and click on the Join Record icon.
The Select join type page is displayed. Using Query Manager, you can create a join between two records (any record join) by selecting your initial base record, defining its output fields and associated criteria, and then returning to the Record page to select the second record.

If you have AutoJoin Wizard option enabled, then PeopleSoft Query automatically attempts to join the new record to the existing record by looking for matching columns on the two records. This function does not always create the correct join.

**Select join type and then record to join with UW_HR_ADDRRES_VW - Address View - MV Snapshot.**

<table>
<thead>
<tr>
<th>Join Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Select join type" /></td>
<td>Join to filter and get additional fields (Standard Join)</td>
</tr>
<tr>
<td><img src="image" alt="Select join type" /></td>
<td>Join to get additional fields only (Left outer join)</td>
</tr>
</tbody>
</table>

**Step 7.** Click on ![A_UW_HR_ALLJOB_VW - OWE - All Job/Comp/Per Org Vw](image) icon.

The Auto Join automatically brings back the fields it has determined that the join should be made on.

**Step 8.** Click on the ![Add Criteria](image) icon.

**Auto Join Criteria**

Query has detected the join conditions shown below.

Use the checkboxes to unselect the criteria that you do not want to add to the query and click add criteria when done. The criteria added can always be modified later using the criteria tab.

- A.EMPLID = EmplID = B.EMPLID - EmplID

**Step 9.** Choose the following fields from UW_HR_ADDRRES_VW:

- ADDRESS_TYPE
- ADDR_TYPE_DESCR
- ADDRESS1
- ADDRESS2
- ADDRESS3
- ADDRESS4
Step 10. Click on the Fields tab.

Step 11. Click on the Add Criteria icon for BUSINESS_UNIT
Step 12. Enter your business unit in the Constant box and click on the OK icon.

Step 13. Click on the Run page. The query results will automatically be displayed in a grid format.
Step 14. Enter a Query Definition and save the query as a private query.

Enter a name to save this query:

- **Query:** MSN_EMPL_ADDR

- **Description:**

- **Folder:**

- **Query Type:** User

- **Owner:** Private

Query Definition:

[Blank space for query definition]

[OK] [Cancel]