PeopleSoft HRMS

V8 Basic Query

Office of Information and Instructional Technology

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# PeopleSoft HRMS V8 Basic Query

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PeopleSoft V8 Basic Query

Introduction

This class will introduce you to the basic concepts of the PeopleSoft HRMS V8 Query tool. Query is a graphical tool that allows you to easily retrieve the specific data you want from the PeopleSoft system by specifying the records, fields, and criteria to be applied to the search. Query results can then be viewed via several methods. This class will focus on viewing and creating ad hoc queries.
PeopleSoft Query Basics

Introduction

In this section, we will concentrate on learning the basic functions of the Query tool. You will learn how to navigate to the Query Manager Search page, and how to work with existing queries.

Objectives

In this section you will learn how to:

- Navigate to the Query Manager Search page
- Work with existing queries
Navigating to the Query Manager Search Page

PeopleSoft provides three options for working with queries.

1. **Query Manager**: This option allows you to view, run, and modify an existing query, or create a new query.

2. **Query Viewer**: This option allows you to only view and run existing queries.

3. **Schedule Query**: This option allows you to schedule a run time for standard queries.

In this class, we will use the Query Manager.
Working with Existing Queries

Navigation: Reporting Tools⇒Query⇒Query Manager

1. To find an existing query, enter the name of the query in the Search by field, and then click Search. If you do not know the exact name of the query, you can use the begins with or contains search criteria, as shown below.

2. Enter BORR in the Search by field.

3. Click Search. A list of available BORR queries displays.

To open any of these queries, click on the link (e.g., BORR011A) for the query.

You can also Delete, Rename, Run, and Schedule these queries without having to open them by clicking on the appropriate link in the query row.

Note: It is important not to make changes to any query you did not create. If you want to make changes to a query, rename and save the query before making any changes.
Understanding Public and Private Queries

- Anyone can use a public query.

- Only the person who created a private query can use it.

- It is important not to make changes to any query you did not create. If you want to make changes to a query, rename and save the query before making any changes.

- Always save your private version that you created from a public query with a unique name. We recommend using the your initials as the first three letters of the query name. Example: CEW_PUBLIC_QUERY.

- If you create a public query, consider creating a private copy with a unique name for yourself. Therefore, if someone mistakenly changes a public query you created, you still have a copy of the original query.

- When you search for queries from the Query Manager Search page, PeopleSoft automatically lists all private queries you created. Only you will see these. Public queries are listed after private queries.

- If you run a public query and do not receive results, you may not have authorization to some of the data used in that query.
Creating New Queries

Introduction

In this section, we will concentrate on learning how to create new queries.

Objectives:

In this section, you will learn how to:

- Select records
- Join records
- Save queries
- Work with fields
- Preview the query
- Add criteria
- Remove criteria
- Use wildcards
- Work with prompts
- Work with translate values
- Export data
Selecting Records

Navigation: Reporting Tools⇒Query⇒Query Manager

1. Click the Create New Query link.

The first step to create a new query is to select a record. A record is the table that holds the data for which you are searching. To find the appropriate record (table), enter the name of the record in the Search by field and click Search. If you do not know the exact name of the record, you can use the begins with or contains search criteria.

2. Enter JOB in the Search by field and click Search.

A Search Results list of JOB records displays.
3. Click the ➕ for the JOB – EE Job History record to view the available fields.

4. Click the Add Record link to add the record to your query. For many records, you will receive the following message:

   An effective date criteria has been automatically added for this effective dated record. (139,60)

Many tables in PeopleSoft have an automatic effective date criteria added. We recommend that you leave the criteria in your query, since most of the time you will want to see the most recent data row. However, you can remove the criteria later if you want to expand your query results.
5. Click \[
\text{OK} \]
. The Query tab displays with a list of the fields for the JOB – EE Job History record in the Chosen Records group box.

6. Click the check boxes ON to select the following fields:
   - EMPLID
   - EMPL_RCD
   - EFFDT
   - DEPTID
   - JOBCODE
   - POSITION_NBR
   - EMPL_STATUS
Joining Records

Automatic Record Joins

In the Job table you will notice that some fields have an underlined Join table next to the field name. PeopleSoft automatically notifies you of tables that contain information pertinent to a particular field. For example, next to the DEPTID field you see Join DEPT_TBL - Departments.

1. Click the **Join DEPT_TBL - Departments** link. PeopleSoft adds the DEPT_TBL.

2. Click the check box next to the **DESCR – Description** field ON. This will add the department ID description to your query results.
Manual Record Joins

To join other records (tables) that do not have automatic joins displayed, go to the Records tab to join these manually.

1. Click the Records tab.

2. Enter PAY_CHECK in the Search by field and click **Search**. A Search Results list of all records that begin with PAY_CHECK displays.

   1. Click the **Records** tab.

   2. Enter PAY_CHECK in the **Search by** field and click **Search**. A Search Results list of all records that begin with PAY_CHECK displays.

   3. Click the **Join Record** link for the PAY_CHECK – Pay Check record.

   When joining more than two records, PeopleSoft will ask to which table you would like to join. You always want to join with the record containing your main information. In this example, we want to join to the JOB record.

   4. Click the **A = JOB – EE Job History** link.

   Select record to join with PAY_CHECK - Pay Check.
The Auto Join Criteria page displays. Once you select the table to join to, PeopleSoft provides you with automatic join criteria. **Always select the criteria provided.** These automatic criteria elements are based upon key fields in each table that is needed to appropriately join the tables. If you click one of these criteria joins OFF, your query will not run properly.

**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.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.EMPLID - EmplID = C.EMPLID - EmplID</td>
<td></td>
</tr>
<tr>
<td>A.EMPL_RCD - Empl Rcd Nbr = C.EMPL_RCD - Empl Rcd Nbr</td>
<td></td>
</tr>
<tr>
<td>C.COMPANY - Company = A.COMPANY - Company</td>
<td></td>
</tr>
<tr>
<td>C.PAYGROUP - Pay Group = A.PAYGROUP - Pay Group</td>
<td></td>
</tr>
</tbody>
</table>

5. Click **Add Criteria**.

6. Select the following fields from the PAY_CHECK – Pay Check record:
   - **PAY_END_DT**
   - **TOTAL_GROSS**
   - **TOTAL_TAXES**
Saving Queries

Now that you have chosen your records and fields, you can save your query. We recommend that you save your queries early and often, in case you have a power outage or computer problem. That way, you will not lose what you have created.

Tips for Saving Your Queries

- You can save your query from any tab except the Records and Preview tabs.
- Query name must be all CAPS.
- Names can be up to 30 characters is length.
- No spaces or special characters are allowed except an underscore.
- We suggest you use your initials before the query name. Example: CEW_QUERY_TRAIN.
- The Description can also be up to 30 characters long.
- Your Query Type will almost always be User.
- Choose Public or Private ownership depending on whether you want others to access your query.
- The Query Definition field allows for more detailed description or special notes.

Process

1. Click on the bottom left of the tab you are on.
2. Enter your query information in the appropriate fields.

Enter a name to save this query:

<table>
<thead>
<tr>
<th>*Query:</th>
<th>TRAIN1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description:</td>
<td>Query Training 1</td>
</tr>
<tr>
<td>*Query Type:</td>
<td>User</td>
</tr>
<tr>
<td>*Owner:</td>
<td>Private</td>
</tr>
<tr>
<td>Query Definition:</td>
<td></td>
</tr>
</tbody>
</table>

OK Cancel

3. Click OK.
Working with Fields

Once you have selected your records and fields and saved your query, you can go to the Fields tab to view your selections.

1. Click the **Fields** tab.

   PeopleSoft identifies each field with a letter preceding the field name. The letter corresponds to the record the field is chosen from. The records are labeled in sequential order according to when you chose the record. In our example, you chose the JOB record first, so all fields from the JOB record are preceded with the letter A. You chose the DEPT_TBL record second, so the DESCR field is preceded with the letter B.

   If you would like the fields in a different order in your query output, click **Reorder/Sort** in the upper right corner of the Fields tab.
2. Click **Reorder / Sort**. The Edit Field Ordering page displays.

3. Enter sequential numbers in the fields in the **New Column** section to change the order in which your fields appear left to right in the query output.

4. Enter sequential numbers in the fields in the **New Order By** section to change how data is sorted.

5. Click **OK** to see the new order of your fields.
### Previewing the Query

To see the information you have chosen so far, click the **Preview** tab.

<table>
<thead>
<tr>
<th>DeptID</th>
<th>Descr</th>
<th>From</th>
<th>To</th>
<th>ID</th>
<th>Empl Rels</th>
<th>Job Code</th>
<th>Tot Gross</th>
<th>Total Taxes</th>
<th>Eff Date</th>
<th>Position</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1101 200</td>
<td>01/17/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>788.80</td>
<td>133.48</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>1101 200</td>
<td>01/17/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>788.80</td>
<td>133.48</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>1101 200</td>
<td>02/14/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>788.80</td>
<td>133.48</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>1101 200</td>
<td>02/28/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>788.80</td>
<td>133.48</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>1101 200</td>
<td>03/14/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>788.80</td>
<td>133.48</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>1101 200</td>
<td>03/28/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>788.80</td>
<td>133.48</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>1101 200</td>
<td>04/11/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>788.80</td>
<td>133.48</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>1101 200</td>
<td>04/25/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>788.80</td>
<td>133.48</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>1101 200</td>
<td>05/09/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>788.80</td>
<td>133.48</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>1101 200</td>
<td>05/23/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>788.80</td>
<td>170.73</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>1101 200</td>
<td>06/06/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>788.80</td>
<td>131.27</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>1101 200</td>
<td>06/29/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>788.80</td>
<td>131.26</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>1101 200</td>
<td>07/04/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>788.80</td>
<td>131.27</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>1101 200</td>
<td>07/18/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>788.80</td>
<td>131.26</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>1101 200</td>
<td>08/01/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>788.80</td>
<td>131.27</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>1101 200</td>
<td>08/15/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>788.80</td>
<td>131.26</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17</td>
<td>1101 200</td>
<td>08/29/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>1153.42</td>
<td>237.41</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18</td>
<td>1101 200</td>
<td>09/12/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>1153.42</td>
<td>237.42</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>1101 200</td>
<td>09/26/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>1153.42</td>
<td>237.40</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>1101 200</td>
<td>10/10/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>1153.42</td>
<td>237.41</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>1101 200</td>
<td>10/24/2003</td>
<td>08/18/2003</td>
<td>510000</td>
<td>0</td>
<td>1153.42</td>
<td>276.68</td>
<td>08/18/2003</td>
<td>000000512 A</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The numbers in the upper right corner display the total records returned from your query. This query returned 1633 records, and records 1-100 are displayed. Use the arrow buttons to view more records.
Adding Criteria

To narrow down the amount of records in your query output and to choose specific types of data, you need to add criteria to your query.

1. Click the **Criteria** tab.

   ![Query interface with Criteria tab highlighted]

   In the Criteria tab, you will see several criteria elements. PeopleSoft added these elements automatically to your query when you selected or joined records. These criteria include EFFDT - Effective Date to return the most recent row of data, and automatic table joins for key fields. It is best to leave these criteria elements as they are. The only one you may want to change is the Effective Date, which would allow you to expand your query results.

   There are several ways to add criteria to your query. To add criteria to the fields you have already selected, you can use the Fields tab.

2. Click the **Fields** tab.

   ![Query interface with Fields tab highlighted]
3. Click the button to the right of the field you want to use for your criteria; for example, the PAY_END_DT field. The Edit Criteria Properties page displays.

```
Edit Criteria Properties

Choose Expression 1 Type
- Field
- Expression

Expression 1
Choose Record and Field
- Record Alias.Fieldname:
  C.PAY_END_DT - Pay Period End

*Condition Type:
  equal to

Choose Expression 2 Type
- Field
- Expression
- Constant
- Prompt
- Subquery

Expression 2
Define Constant
- *Date: [input field]
```

4. Verify that the Field radio button is selected in the Choose Expression 1 Type group box. Most of the time you will accept this default selection.

5. Verify that C.PAY_END_DT – Pay Period End appears as the Record Alias.Fieldname field in the Expression 1 group box. This is the field that you selected in Step 3 to which the criteria will be added.

6. Click on the down arrow next to the Condition Type field.

```
*Condition Type:
  equal to
  between
  does not exist
  equal to
  exists
  greater than
  in list
  in tree
  is not null
  is null
  less than
  like
```
**Condition Types**

The following table describes the available Condition Types for criteria. For each of the Condition Types, Query Manager offers a not option that reverses its effect. For example, not equal to returns all rows that equal to would not return.

<table>
<thead>
<tr>
<th>Condition Types</th>
<th>When It Returns a Row</th>
</tr>
</thead>
<tbody>
<tr>
<td>between</td>
<td>The value in the selected record field falls between two comparison values. The range is inclusive.</td>
</tr>
<tr>
<td>equal to</td>
<td>The value in the selected record field exactly matches the comparison value.</td>
</tr>
<tr>
<td>exists</td>
<td>This operator is different from the others, in that it doesn't compare a record field to the comparison value. The comparison value is a subquery. If the subquery returns any data, PeopleSoft Query returns the corresponding row.</td>
</tr>
<tr>
<td>greater than</td>
<td>The value in the record field is greater than the comparison value.</td>
</tr>
<tr>
<td>in list</td>
<td>The value in the selected record field matches one of the comparison values in a list.</td>
</tr>
<tr>
<td>in tree</td>
<td>The value in the selected record field appears as a node in a tree created with PeopleSoft Tree Manager. The comparison value for this operator is a tree or branch of a tree that you want PeopleSoft Query to search.</td>
</tr>
<tr>
<td>is null</td>
<td>The selected record field does not have a value in it. You do not specify a comparison value for this operator. Key fields, required fields, character fields, and numeric fields do not allow null values.</td>
</tr>
<tr>
<td>less than</td>
<td>The value in the record field is less than the comparison value.</td>
</tr>
<tr>
<td>like</td>
<td>The value in the selected field matches a specified string pattern. The comparison value may be a string that contains wildcard characters. The wildcard characters that PeopleSoft Query recognizes are % and _.</td>
</tr>
<tr>
<td></td>
<td>% matches any string of zero or more characters. For example, C% matches any string starting with C, including C alone.</td>
</tr>
<tr>
<td></td>
<td>_ matches any single character. For example, _ones matches any five-character string ending with ones, such as Jones or Cones. PeopleSoft Query also recognizes any wildcard characters that your database software supports. See your database management system documentation for details.</td>
</tr>
<tr>
<td></td>
<td>To use one of the wildcard characters as a literal character (e.g., to include a % in your string), precede the character with a . For example, percent.</td>
</tr>
</tbody>
</table>
7. Select **between** as the Condition Type.

```
*Condition Type: between
```

Note that when you selected **between**, the available options in the Choose Expression 2 Type group box changed, and an additional Define Constant 2 box was added to the Expression 2 group box.

**Note:** When you use EFFDT criteria such as PAY_END_DT, PeopleSoft Query offers special effective date operators.

8. Enter the **dates** for your date range in the **Date** and **Date 2** fields in the Expression 2 group box as shown below.

![Edit Criteria Properties](image)

9. Click **OK**. This brings you back to the Fields tab.

10. Click the **DEPT_ID** field. The Edit Criteria Properties page displays.

11. Verify **Field** is selected in the Choose Expression 1 Type group box.

12. Verify **DEPT_ID – Department** appears in the Expression 1 group box.
13. Click on the down arrow next to the Condition Type field and select **in list**.

![Edit Criteria Properties](image1.png)

14. Click the **in** in the Edit List box in the Expression 2 group box to add Department IDs to the List Members field. The Edit List page displays.

![Edit List](image2.png)

If you know the exact value you are looking for, enter it in the Value field and click **Add Value**. If you do not know the exact value, you can click **Search** to retrieve a list from which choose. If you are searching on a field that has many values you will receive the following message:

![Microsoft Internet Explorer](image3.png)

It is best to know the exact values for these types for fields. Click **OK** and then click **Cancel** at the bottom of the page to bring you back to the Edit List page.
15. Enter 1101200 in the Value field.

**Edit List**

No values have been added yet.

Value: 1101200  [Add Value]  [Search]  [Delete Checked Values]

[OK]  [Cancel]

16. Click [Add Value].

17. Repeat Steps 15 and 16 to add Departments 1101300 and 1104300 to your list.

**Edit List**

<table>
<thead>
<tr>
<th>List Members</th>
<th>Customize</th>
<th>Find</th>
<th>First</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>1101200</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1101300</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1104300</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Value: [Add Value]  [Search]  [Delete Checked Values]

[OK]  [Cancel]

18. Click [OK]. This brings you back to the Edit Criteria Properties page.

**Edit Criteria Properties**

Choose Expression 1 Type:
- Field
- Expression

Expression 1:
- Choose Record and Field
  - Record Alias/Fieldname: ADEPTID - Department

*Condition Type:
- In list

Choose Expression 2 Type:
- In List
- Subquery

Expression 2:
- Edit List
  - List Members: (1101200, 1101300, 1104300)

[OK]  [Cancel]

19. Click [OK]. This brings you back to the Fields tab.
Other Ways to Add Criteria – Query Tab

You can add criteria for a field that you have not selected for your query output. You can do this through the Query tab or the Criteria tab.

1. Click the **Query** tab.

2. Click the for the JOB record (table).

To add criteria for the Action field, for example, you do not need to check the box for the field. You can add the criteria on the Edit Criteria Properties page.

3. Click the for the ACTION field. The Edit Criteria Properties page displays.
Other Ways to Add Criteria – Criteria Tab
In the Criteria tab, you can also add criteria for a field that you have not selected.

1. Click the Criteria tab.

2. Click Add Criteria. The Edit Criteria Properties page displays.

3. Click the in the Expression 1 Choose Record and Field group box. The Select a field page displays.

   **Select a field**

<table>
<thead>
<tr>
<th>Alias</th>
<th>Record</th>
<th>Record Description</th>
<th>Show Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>JOB</td>
<td>EE Job History</td>
<td></td>
</tr>
<tr>
<td>B</td>
<td>DEPT_TBL</td>
<td>Departments</td>
<td></td>
</tr>
<tr>
<td>C</td>
<td>PAY_CHECK</td>
<td>Pay Check</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   Click Show Fields for the JOB record.

4. Click Show Fields for the JOB record.

5. Click the **A.ACTION – Action** link. The Edit Criteria Properties page displays.

   **Select a field**

<table>
<thead>
<tr>
<th>Customized</th>
<th>Find</th>
<th>View 100</th>
<th>First</th>
<th>Previous</th>
<th>First</th>
<th>Previous</th>
<th>Next</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.EMPLID</td>
<td>EmplID</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A.EMPL_RCD</td>
<td>Empl Rcd Nbr</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A.EFFDT</td>
<td>Effective Date</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A.EFFSEQ</td>
<td>Effective Sequence</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A.DEPTID</td>
<td>Department</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A.JOBCODE</td>
<td>Job Code</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A.POSITION_NBR</td>
<td>Position Number</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A.APPT_TYPE</td>
<td>Appointment Type</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A.MAIN_APPT_NUM_JPN</td>
<td>Main Appointment Number</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A.POSITION_OVERRIDE</td>
<td>Override Position Data</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A.POSN_CHANGE_RECORD</td>
<td>Position Management Record</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A.EMPL_STATUS</td>
<td>Employee Status</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A.ACTION</td>
<td>Action</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Removing Criteria

To remove criteria you have added, access the Criteria tab and click the ▼ beside the criteria statement you want to remove.

1. Click the Criteria tab.

2. Click the ▼ in the Delete column for the DEPTID – Department criteria.

3. Return to the Fields tab for more criteria options.
Using Wildcards

If you are unsure about the exact value for your search criteria and there are too many values to search on (like DEPT_ID in our first example), you may want to use wildcards. If you didn’t know the exact department IDs but you knew the range that you wanted, you could use the `like` Condition Type and use the `%` or the `_` (underscore) wildcard.

For example:
- `110%` would return all Department IDs that began with 110.
- `_____200` would return IDs with any four beginning numbers with 200 on the end. Four underscores are entered at the beginning.
- `___04%` would return IDs with any two numbers in the beginning, 04 as the 3rd and 4th digit, and any numbers as the last three digits.

1. Click the **Fields** tab.
2. Click the **add** to the right of the DEPTID field. The Edit Criteria Properties page displays.
3. Verify that **Constant** is selected in the Choose Expression 2 Type group box.
4. Click on the down arrow next to the Condition Type field and select **like**.
5. Enter `____12%` (three underscores) in the Constant field in the Expression 2 Define Constant group box. The criteria will return any Department that has any number for the first 3 characters, 1 as the 4th character, 2 as the 5th character, and any other numbers for characters 6 and 7.

**Note:** Department IDs are 7 characters long.
6. Click **OK**. This brings you back to the Fields tab.

7. **Click the Criteria tab** to view the new criteria for DEPTID.

<table>
<thead>
<tr>
<th>Logical</th>
<th>Expression 1</th>
<th>Condition Type</th>
<th>Expression 2</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>AND</td>
<td>A.EFFDT - Effective Date</td>
<td>&lt;=</td>
<td>Current Date $&amp;$ Last</td>
<td>Edit</td>
<td>Yes</td>
</tr>
<tr>
<td>AND</td>
<td>B.EFFDT - Effective Date</td>
<td>&lt;=</td>
<td>A.EFFDT - Effective Date</td>
<td>Edit</td>
<td>Yes</td>
</tr>
<tr>
<td>AND</td>
<td>A.EMPLID - EmpID</td>
<td>equals</td>
<td>C.EMPLID - EmpID</td>
<td>Edit</td>
<td>Yes</td>
</tr>
<tr>
<td>AND</td>
<td>A.EMPL_RCD - EmpID Rdb</td>
<td>equals</td>
<td>C.EMPL_RCD - EmpID Rdb</td>
<td>Edit</td>
<td>Yes</td>
</tr>
<tr>
<td>AND</td>
<td>A.COMPANY - Company</td>
<td>equals</td>
<td>A.COMPANY - Company</td>
<td>Edit</td>
<td>Yes</td>
</tr>
<tr>
<td>AND</td>
<td>A.PAYGROUP - Pay Group</td>
<td>equals</td>
<td>A.PAYGROUP - Pay Group</td>
<td>Edit</td>
<td>Yes</td>
</tr>
<tr>
<td>AND</td>
<td>O.PAY_END_DT - Pay Period End Date</td>
<td>between</td>
<td>2003-01-17 $&amp;$ 2004-04-09</td>
<td>Edit</td>
<td>Yes</td>
</tr>
<tr>
<td>AND</td>
<td>A.DEPTID - Department</td>
<td>like</td>
<td>__12%</td>
<td>Edit</td>
<td>Yes</td>
</tr>
</tbody>
</table>

8. **Click the Preview tab.**
Working with Prompts

Queries can be designed to prompt you for information when you run them. Therefore, the results of your query are narrowed to only the data matching the information you entered, rather than data from all records. To add a prompt to your query, access the Criteria tab.

1. Click the Criteria tab.

2. Click Add Criteria. The Edit Criteria Properties page displays.

3. Click the in the Expression 1 Choose Record and Field group box. The Select a field page displays.
4. Click `Show Fields` for the JOB record. A list of available fields displays.

5. Select `PAYGROUP` from the list of available fields.

6. Click on the down arrow next to the Condition Type field and select `like`. 
7. Select the **Prompt** radio button in the Choose Expression 2 Type group box.

8. Click the **New Prompt** link in the Expression 2 Define Prompt group box. The Edit Prompt Properties page displays.

9. Verify that **PAYGROUP** appears as the Field.

10. Verify **Prompt Table** appears in the Edit Type field. This will allow you to look up prompt selections. For example, if you are unsure of the different paygroup options, you can choose search and the query will provide a list of options from the PAYGROUP_TBL.

    **Note:** For the training class, the PAYGROUP_TBL is not populated so we need to choose the Edit Type of **No Table Edit**. However, this table is populated on all GeorgiaFIRST databases.
11. Change the Heading Type from RFT Short to Text.

12. Change the Heading Text from Group to Enter Paygroup. The Heading Text is the message that you will see when prompted.

**Edit Prompt Properties**

Field: PAYGROUP

*Heading Type:*

Text

*Type:*

Character

*Format:*

Upper

Length: 3

Decimals: 0

*Unique Prompt Name:*

BIND1

Prompt Table: PAYGROUP_TBL

13. Click OK. This brings you back to the Edit Criteria Properties page.

**Edit Criteria Properties**

Choose Expression 1 Type

○ Field
○ Expression

*Condition Type:*

like

Choose Expression 2 Type

○ Constant
○ Prompt

Expression 1

Choose Record and Field

Record Alias Fieldname: APAYGROUP - Pay Group

Expression 2

Define Prompt

Prompt: :1

New Prompt: Edit Prompt

14. Click OK. This brings you back to the Criteria tab.
15. Click the **Preview** tab to view the prompt.

**TRAIN1**

Enter Paygroup:  

[OK] [Cancel]

16. Enter **B06** in the Enter Paygroup field and click [OK]. The query returns only information for Pay Group B06.

<table>
<thead>
<tr>
<th>DeptID</th>
<th>Descr</th>
<th>Pay Period End Dt</th>
<th>ID</th>
<th>EmpId</th>
<th>Job Class</th>
<th>Hire Date</th>
<th>Pay Gross</th>
<th>Total Gross</th>
<th>Pay Date</th>
<th>Position</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1101208</td>
<td>01/01/2003</td>
<td>960008</td>
<td>0</td>
<td>510008</td>
<td>768.89</td>
<td>133.48</td>
<td>08/10/2003</td>
<td>000083632 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>1101208</td>
<td>01/01/2003</td>
<td>960008</td>
<td>0</td>
<td>510008</td>
<td>768.89</td>
<td>133.47</td>
<td>08/10/2003</td>
<td>000083632 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>1101208</td>
<td>02/14/2003</td>
<td>960008</td>
<td>0</td>
<td>510008</td>
<td>768.89</td>
<td>132.08</td>
<td>08/10/2003</td>
<td>000083632 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>1101208</td>
<td>02/28/2003</td>
<td>960008</td>
<td>0</td>
<td>510008</td>
<td>768.89</td>
<td>132.07</td>
<td>08/10/2003</td>
<td>000083632 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>1101208</td>
<td>03/14/2003</td>
<td>960008</td>
<td>0</td>
<td>510008</td>
<td>768.89</td>
<td>134.48</td>
<td>08/10/2003</td>
<td>000083632 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>1101208</td>
<td>03/28/2003</td>
<td>960008</td>
<td>0</td>
<td>510008</td>
<td>768.89</td>
<td>133.47</td>
<td>08/10/2003</td>
<td>000083632 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>1101208</td>
<td>04/11/2003</td>
<td>960008</td>
<td>0</td>
<td>510008</td>
<td>768.89</td>
<td>133.48</td>
<td>08/10/2003</td>
<td>000083632 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>1101208</td>
<td>04/25/2003</td>
<td>960008</td>
<td>0</td>
<td>510008</td>
<td>768.89</td>
<td>133.47</td>
<td>08/10/2003</td>
<td>000083632 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>1101208</td>
<td>05/06/2003</td>
<td>960008</td>
<td>0</td>
<td>510008</td>
<td>768.89</td>
<td>133.48</td>
<td>08/10/2003</td>
<td>000083632 A</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>1101208</td>
<td>05/23/2003</td>
<td>960008</td>
<td>0</td>
<td>510008</td>
<td>768.89</td>
<td>139.71</td>
<td>08/10/2003</td>
<td>000083632 A</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Now that you have learned how to add a prompt to your query, you will learn how to add multiple prompts.
Using Multiple Prompts

You can add more than one prompt to your query. For example, you may want to have the option of adding several employee IDs at a time.

1. Click the **Create New Query** link.

2. Locate and select the **EMPLOYEES** table.

3. Select the following fields from the **EMPLOYEES** table:
   - **EMPLID**
   - **ORG_HIRE_DT**

4. Save your query as **XXX_MULT_PROMPT**, where XXX are your initials.

5. Click the **Fields** tab.

6. Click the **next** to EMPLID. The Edit Criteria Properties page displays.

   **Edit Criteria Properties**

   **Choose Expression 1 Type**
   - Field
   - Expression

   **Condition Type:**
   - equal to

   **Choose Expression 2 Type**
   - Field
   - Expression
   - Constant
   - Prompt
   - Subquery

   **Expression 1**
   **Choose Record and Field**
   **Record Alias.Fieldname:**
   - A.EMPLID - EmpID

   **Expression 2**
   **Define Prompt**
   - **Prompt**
   - **New Prompt**
   - **Edit Prompt**

7. Verify the Condition Type is **equal to**.

8. Select the **Prompt** radio button in the Choose Expression 2 Type group box.

9. Click the **New Prompt** link in the Expression 2 Define Prompt group box. The Edit Prompt Properties page displays.
10. Verify **EMPLID** appears as the Field.

11. Change the Heading Text to **EMPLID1**.

12. Click [OK]. This brings you back to the Edit Criteria Properties page.

13. Click [OK]. This brings you back to the Criteria tab.

14. Repeat Steps 5 through 13 to add two more prompts to your query.
   - Select **equal to** as the Condition Type for each prompt.
   - Change the Heading Text for the second prompt to **EMPLID2**, and to **EMPLID3** for the third prompt.

Your Criteria tab should look like the following:

15. Click [Group Criteria]. The Edit Criteria Grouping page displays.
16. Enter a **left parenthesis** ( in the left box beside the first EMPID.

17. Enter a **right parenthesis** ) in the right box beside the third EMPID.

18. Click **OK**. This brings you back to the Criteria tab.

19. Change the Logical field for the second and third EMPID prompts from **AND** to **OR**.

20. Click the **Preview** tab. A page displays to enter your prompts.
21. Enter the following EMPLIDs:
   - EMPLID1: 000003
   - EMPLID2: 000045
   - EMPLID3: 000021

22. Click **OK**. The Preview tab displays.
Working with Translate Values

As discussed earlier when selecting fields, sometimes it is necessary to join to another record to retrieve the description for that field. For example, earlier you joined to the DEPT_TBL to get the description for the Department Code. For some fields, PeopleSoft includes a translate (XLAT) value that allows you to see the descriptive version of the field without going to a separate table.

1. Click the Fields tab. Notice the column headings above the fields.

   If a field has a translate value, N will appear under the XLAT column heading. Note that EMPL_STATUS has a translate value.

2. Click Edit beside EMPL_STATUS. The Edit Field Properties page displays.
3. Select the **Long** radio button in the Translate Value group box. This group box gives you the option to select a Short or Long description.

4. Click **OK**. This brings you back to the Fields tab. Notice that L now appears in the **XLAT** column heading for the EMPL_STATUS field.

5. Click the **Preview** tab to view the translate value in the EMPL_STATUS field. Notice the data in the Status column now says Active or Terminated instead of A or T.
Exporting Data

Query Manager allows you to export data to Excel or to a text document in CSV format. You can export data from the Query Manager run page or from the Preview page.

1. Open Query Manager and search for the query you created.

2. Click the Run link without opening the query. A separate Preview page displays. You have the option to download the results to an Excel Spreadsheet or a CSV Text File. Here you will choose the CVS text file.

3. Click the CSV Text File link. A File Download dialog box displays.

---

**Exporting Data**

Query Manager

**Find an Existing Query**

<table>
<thead>
<tr>
<th>Search by:</th>
<th>Name begins with TRAIN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td></td>
</tr>
</tbody>
</table>

**Query**

<table>
<thead>
<tr>
<th>Query</th>
<th>Definition</th>
<th>Sort Order</th>
<th>Edit</th>
<th>View</th>
<th>Run</th>
<th>Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>TR1</td>
<td>Query Training 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TRAIN1 - Query Training 1**

<table>
<thead>
<tr>
<th>Group</th>
<th>Group ID</th>
<th>View Results</th>
</tr>
</thead>
</table>

Download results in: Excel Spreadsheet, CSV Text File (74 kb)

---

**Exporting Data**

Query Manager

**Find an Existing Query**

<table>
<thead>
<tr>
<th>Search by:</th>
<th>Name begins with TRAIN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td></td>
</tr>
</tbody>
</table>

**Query**

<table>
<thead>
<tr>
<th>Query</th>
<th>Definition</th>
<th>Sort Order</th>
<th>Edit</th>
<th>View</th>
<th>Run</th>
<th>Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>TR1</td>
<td>Query Training 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TRAIN1 - Query Training 1**

<table>
<thead>
<tr>
<th>Group</th>
<th>Group ID</th>
<th>View Results</th>
</tr>
</thead>
</table>

Download results in: Excel Spreadsheet, CSV Text File (74 kb)
4. It is best to choose [Save] and save your results to your local network drive.

You can also download your data while working in your query.

5. Go back to the Query Manager – Find an Existing Value page, and click the name of your query to open it.

6. Click the **Preview** tab. Notice in the upper left corner you have the option to **Download to Excel**. When you click this link, the same File Download dialog box appears and you can save the file to your network drive.
[This page intentionally blank to facilitate double-sided printing.]
## Exercises

Below is a list of Queries to try. Please name each query with your first three initials then underscore query 1, and so on. Example CEW_QUERY1, CEW_QUERY2, etc.

<table>
<thead>
<tr>
<th></th>
<th>Description</th>
<th>Tables</th>
<th>Fields</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>List of employees in the M04 paygroup who have a GA defined deduction</td>
<td>A – JOB</td>
<td>A.EMPLID, A.PAYGROUP, B.DEDCD, B.DED_CUR</td>
<td>A.PAYGROUP = M04</td>
</tr>
<tr>
<td></td>
<td></td>
<td>B – PAY_DEDUCTION</td>
<td></td>
<td>B.DEDCD = GDCPA</td>
</tr>
<tr>
<td>2</td>
<td>List of Employees with their Earned Income Credit status</td>
<td>A - FED_TAX_DATA</td>
<td>A.EMPLID, A.EIC_STATUS</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Employees with FSA benefit</td>
<td>A - FSA_BENEFIT</td>
<td>A.EMPLID, A.PLAN_TYPE, A.EFFDT, A.ANNUAL_PLEDGE,</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>B - PERS_DATA_EFFDT</td>
<td></td>
<td>B.MAR_STATUS, B.SEX, C.NAME</td>
</tr>
<tr>
<td></td>
<td></td>
<td>C – PERSONAL_DATA</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>List of employees who have garnishments</td>
<td>A- GARN_SPEC</td>
<td>A.EMPLID, A.GARN_STATUS, A.GARN_LIMIT_AMT,</td>
<td>A.GARN_STATUS = A</td>
</tr>
<tr>
<td></td>
<td></td>
<td>B – PAY_CHECK</td>
<td></td>
<td>B.PAY_END_DT between 08/01/2003 and 04/09/2004</td>
</tr>
<tr>
<td></td>
<td></td>
<td>B – PAY_CHECK_EARNS</td>
<td></td>
<td>B.ERNCD = RET</td>
</tr>
<tr>
<td>6</td>
<td>FICA deductions YTD for calendar year 2003 for employees in paygroups B06 and B07</td>
<td>A – TAX_BALANCE</td>
<td>A.EMPLID, A.TAX_YTD, B.PAYGROUP</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>B - JOB</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Criteria | A.BALANCE_ID = CY  
|          | A.BALANCE_YEAR = 2003  
|          | A.STATE = $U  
|          | A.TAX_CLASS = D  
|          | B.PAYGROUP in list B06, B07  |

7. **Description**  
For the query you created in Exercise 6, delete the A.BALANCE_YEAR = 2003 criteria and add a prompt for Balance Year.