



DATA SERVICES

ctclick PeopleSoft Query

Quick Start Guide


Quick Start Guide for PeopleSoft Query Basics

Created – 6/2016

Paula McDaniel
Data Analytics Learning and Education Instructor
Washington State Board of Community and Technical Colleges

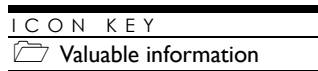
Table of Contents

Introduction to PeopleSoft Query	1
What is a Relational Database?	1
PeopleSoft Pillars and Modules	3
PS Query Protocol.....	4
Query Development Life Cycle	4
Query Migration	4
PS Query Development Protocol.....	6
CtcLink PS Query Maintenance Protocol	7
PS Query Terms.....	8
Using PeopleSoft Query	9
Accessing PS Query	9
Using PeopleSoft Query Viewer	10
Searching Using Query Viewer	10
Searching Using Wildcards	11
Query Viewer Options	11
Using PeopleSoft Query Manager	12
Searching Using Query Manager	12
Searching Using Wildcards	13
Query Manager Options.....	13
Using PeopleSoft Schedule Query.....	14
Scheduling a Query to Run Through Query Viewer and Query Manager	14
Scheduling a Query to Run Through Schedule Query.....	17
Scheduling a BI Publisher Report	20
Creating a Simple Query	22
The Records Tab	23
The Query Tab	26
The Fields Tab	27
View SQL Tab	29
Run Tab.....	30
Creating Joins in PS Query	32
Standard Join.....	32
Outer Join	33
Creating a Join.....	33
Using Criteria in PS Query	35
Adding Criteria	36
Using Prompts to Extend the Life of a Query.....	42
Creating Prompts through the Prompts Tab	42

Creating Prompts Through the “Add Criteria” icon 	46
PeopleSoft Query Tips and Tricks.....	48
Helpful Prompts.....	48
Working With Multiple Effective Dates	48
Optional Prompt with Data Validation.....	50
Optional Prompt with No Data Validation	51
Optional Numeric Prompt with No Data Validation.....	52
Date Prompt.....	54
DATE RANGE PROMPT	55
Prompt with wildcard (%).....	56
Fields that Don’t Match (but look like they do).....	57
PS Query Core Tables	58
Campus Solutions	58
Finance	58
Human Capital.....	58
Prompt Tables to Use.....	59
Campus Solutions (CS)	59
Finance (FIN)	59
Human Capital Management (HCM).....	59
Running Large Queries	59
Coding Manual Link	63
FERPA Data Restrictions in Campus Solutions	63

How to Use This Quick Start Guide

As we work our way through the training manual, be on the lookout for this icon which indicates areas of special interest or importance.



The Quick Start Guide is broken down into three sections.

- Section 1 covers the introduction to PeopleSoft Query with information on how data is stored and accessed through Query Viewer and Query Manager as well as protocol information and helpful terms.
 - Section 2 goes over using PeopleSoft Query including Query Viewer and Query Manager as well as Schedule Query. This section also covers the “how to” of using Query Manager to create simple Queries, Joins and Prompts.
 - Section 3 details PeopleSoft Query Tips and Tricks. This section provides step by step instruction on how to create a number of helpful Prompts, as well as a list of ctcLink core Tables and a list of Prompt tables to use. The end of the section contains the QRG (Quick Reference Guide) for running large Queries as well as a link to the Student and Course Coding Manual.
-

Section

1

PeopleSoft Query

Welcome to PeopleSoft Query! This versatile tool is simple to use and will allow Query Developers to create Queries in an effective and efficient manner.

Introduction to PeopleSoft Query

PeopleSoft Query or PS Query is an end-user reporting tool that allows Query Developers to extract information in the form of a Query from the relational database, without the need to write SQL (Structured Query Language) statements. Queries can be simple or quite complex; they may be used one time or repeatedly, as necessary. Results can be displayed on a page or sent to Excel, HTML, XML or scheduled to run at a later time. In its simplest form a Query is basically a compilation of data from certain fields displayed in the way the user has selected.

What is a Relational Database?

A relational database is a way of storing information that organizes data into tables. The tables are referred to as records in PS Query and they consist of columns and rows (imagine an Excel Spreadsheet). The columns represent fields and the rows detail each instance of stored information. Tables can be linked by creating a defined relationship. These relationships enable you to retrieve and combine data from one or more tables with a single Query. They are based on keys, or columns that uniquely identify each row of data. If a database only has a single table it is referred to as a flat database but if there are two or more tables it is called a relational database.

Imagine that you are responsible for keeping track of all books checked out of the local library. You might keep a list similar to the following:

First Name	Last Name	Address	Phone	Book Title	Date
Jennifer	Smith	13 Elm St	867-5309	Anne of Green Gables	6/28/2015

This flat database table works pretty well at meeting the basic need to keep track of who has checked out which book, but it does have a few drawbacks in terms of efficiency, space required, and maintenance time. For example, each time Jennifer checks out another book her contact information will have to be entered again and again.

First Name	Last Name	Address	Phone	Book Title	Due Date
Jennifer	Smith	13 Elm St	867-5309	Anne of Green Gables	6/28/2015
Jane	Yellowrock	1 Freebie House Lane	555-8267	Mercy Blade	7/1/2015
Jennifer	Smith	13 Elm St	867-5309	Anne of Avonlea	7/13/2015
Jennifer	Smith	13 Elm St	867-5309	Ann f Windy Poplars	7/18/2015

This is less efficient and opens the database up to possible errors (maybe the phone number is entered wrong). Therefore, instead of using flat database, multiple tables can be used to “have a place for everything and everything has a place”.

Customer Table

First Name	Last Name	Address	Phone
Jennifer	Smith	13 Elm St	867-5309
Jane	Yellowrock	1 Freebie House Lane	555-8267

Checkout Table

Book Title	Due Date
Anne of Green Gables	6/28/2015
Mercy Blade	7/1/2015
Anne of Avonlea	7/13/2015
Anne of Windy Poplars	7/18/2015

So now all that is needed is a way to relate the two tables. The easiest way to do this is to use a primary key, a way to tell you what combination of fields in the record make each row unique. In the example below, we have created a CUST_ID to identify each customer.

Customer Table

CUST_ID	First Name	Last Name	Address	Phone
123	Jennifer	Smith	13 Elm St	867-5309
456	Jane	Yellowrock	1 Freebie House Lane	555-8267

Checkout Table

CUST_ID	Book Title	Due Date
123	Anne of Green Gables	6/28/2015
456	Mercy Blade	7/1/2015
123	Anne of Avonlea	7/13/2015
123	Anne of Windy Poplars	7/18/2015

An example of two PS Query tables which can be related by the primary key EMPLID is below.

ACAD_DEGR

Key	Description
Y	EMPLID - Empl ID
Y	STDNT_DEGR - Student Degree Nbr
	DEGREE - Degree
	INSTITUTION - Academic Institution
	ACAD_CAREER - Academic Career
	COMPLETION_TERM - Completion Term

PERSON

Key	Description
Y	EMPLID - Empl ID
	BIRTHDATE - Date of Birth
	BIRTHPLACE - Birth Location
	BIRTHCOUNTRY - Birth Country

PeopleSoft Pillars and Modules

☞ The CtcLink implementation of PeopleSoft is composed of three Pillars. These are:

- HCM – Human Capital Management
- CS – Campus Solutions
- FSCM – Financials and Supply Chain Management

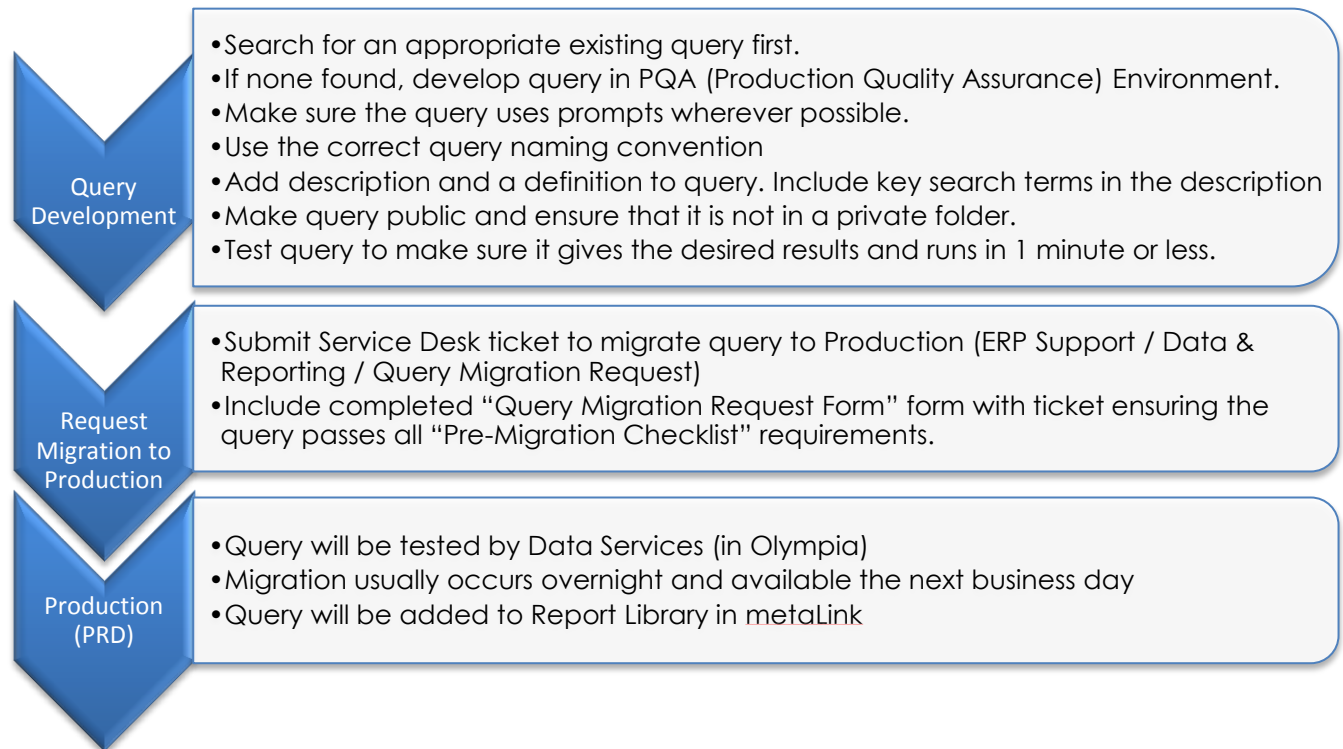
☞ Pillars are comprised of modules where data is captured and stored.

Pillar	Module	Module Abbreviation
CS	Academic Advisement	AA
CS	Academic Structure	AC
CS	Campus Community	CC
CS	Curriculum Management	CM
CS	Financial Aid	FA
CS	Recruiting and Admissions	RA
CS	Student Financials	SF
CS	Student Records	SR
FS	Asset Management	AM
FS	Accounts Payable	AP
FS	Accounts Receivable	AR
FS	Billing	BI
FS	Cash Management	CM
FS	Contracts	CO
FS	Expenses	EX
FS	General Ledger	GL
FS	Grants	GR
FS	Commitment Control	KK
FS	Project Costing	PC
FS	Purchasing	PO
FS	Projects	PR
HC	HR Core	HR
HC	Absence Management	AB
HC	Payroll	PY
HC	Time and Labor	TL
HC	Talent Acquisition Management	TM
HC	Benefits Administration	BA
HC	Faculty Workload	FW

Each pillar has its own relational database and as you are creating Queries it is important to note that standard Queries cannot cross pillar boundaries.

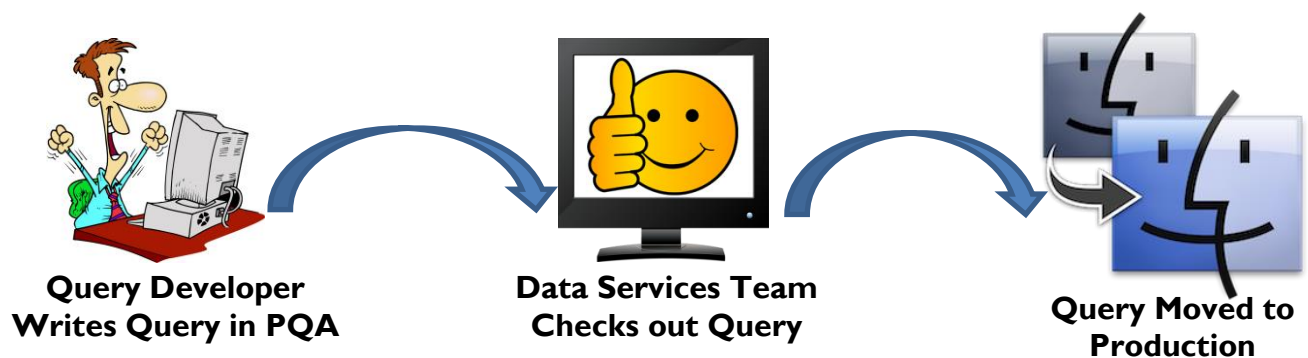
PS Query Protocol

Query Development Life Cycle



Query Migration

Queries are developed in the CtcLink PQA environment. Once they have been reviewed and tested by the SBCTC Data Services team, they are migrated over to production. There is generally a 24 hour turn-around time for this so the process is quick and efficient.



The Data Services team will review the Query for the following:

- | | |
|--|--|
| <ul style="list-style-type: none"> • Correct Naming Convention • Query has a Description • Query has a Definition | <ul style="list-style-type: none"> • Query is Public • Utilization of Prompts • Performance Standards |
|--|--|

The Query Migration Request Form is used by both Query developers and SBCTC to ensure the Query meets all required criteria. Query Developers should first fill out the Pre-Migration Checklist portion of the form before submitting the request for migration. Once the form is submitted with the request, the Data Services team will also review the Query for compliance.

Query Migration Request Form

Query Pre-Migration Checklist

- ☐ Does the query run without errors and produce the expected results?
- ☐ Does the query run in 1 minute or less?
- ☐ Does Query name meet naming standard? See spreadsheet below.
- ☐ Is the Query Public? Private queries will no longer be migrated.
- ☐ Prompts – does Query use Prompts instead of hard coding? Eg: institution, term, business unit etc.
- ☐ Is the Query description included?
- ☐ Is the Query definition included?

Query Migration Request to Production

Query name: _____

Pillar: ☐ Campus Solutions (CS) ☐ Human Capital (HCM) ☐ Finance (FIN)

Query developer's name: _____

Query developer's college: _____

Source environment (which environment is the query currently in): _____

Target environment (where should it be migrated to): _____

* Query name consists of: the letter Q (for query), the 2 character pillar abbreviation (from the spreadsheet below), the 2 character module abbreviation (from the spreadsheet below) and a brief description or name, for example: QCS_FA_NEED_R2TF_WORKSHEET

Pillar	Module	Relevant Functional Module	Pillar	Module	Relevant Functional Module	Pillar	Module	Relevant Functional Module
CS	AA	Academic Advisement	FS	AM	Asset Management	HC	HR	HR Core
CS	AC	Academic Structure	FS	AP	Accounts Payable	HC	AB	Absence Management
CS	CC	Campus Community	FS	AR	Accounts Receivable	HC	PY	Payroll
CS	CM	Curriculum Management	FS	BI	Billing	HC	TL	Time and Labor
CS	FA	Financial Aid	FS	CM	Cash Management	HC	TM	Talent (Acquisition) Management
CS	RA	Recruiting and Admissions	FS	CO	Contracts	HC	BA	Benefits Administration
CS	SF	Student Financials	FS	EX	Expenses	HC	FW	Faculty Workload
CS	SR	Student Records	FS	GL	General Ledger			
			FS	GR	Grants			
			FS	KK	Commitment Control			
			FS	PC	Project Costing			
			FS	PO	Purchasing			
			FS	PR	Projects			

Prior to migration, query will be tested by Data Services in Olympia to ensure it meets performance standards. Please attach this request to the Service Desk migration ticket.

PS Query Development Protocol



SEARCH FOR EXISTING QUERIES BEFORE DEVELOPING NEW QUERIES

Always search existing Queries before creating a new Query. This can potentially save a large amount of time and resources. If you find a Query that is close you can use that as a foundation for your new Query by using “Save As”. As all colleges will have access and be storing their Queries in the same places it is likely you will find that the Query you need has already been developed.



QUERY NAMING CONVENTION

Queries developed should all follow the same naming convention which allows them not be dropped or deleted by changes to the environment. The correct protocol is to start the Query name with Q for Query or V for View followed by:

- FS – for Finance
- CS – for Campus Solutions
- HC – For Human Capital

For example, a Query for Campus Solutions would start with QCS. This beginning section of the name is then followed by the two character module abbreviation which is then in turn followed by a description. As Query names do not allow for spaces or special characters, use underscores for spaces. An example of a correctly formatted Query name is:

QCS_AA_ENROLLED_NO_ADVISOR

Query/Pillar Module Description



QUERY DESCRIPTION AND DEFINITION

The *Description* Field is 30 characters. Use approved abbreviations once the complete list is available. Try to use a description which will facilitate searching.

The *Definition* is not a searchable field from the standard PS Query search areas, however it can be found by creating a Query to search Queries. Use for the “long” description as there is no character limit. In addition, add your home institution code, name and email address. For example:

- Paula McDaniel
- 890: pmcdaniel@sbctc.edu



PUBLIC NOT PRIVATE

Queries can be saved either privately or publically. CtcLink Queries should always be saved as public so that other Query Developers are able to see and use them. If all Queries are public and able to be searched it will prevent the duplication of effort that could happen if a Query was private and not visible to others on the team and then reproduced.

PROMPTS UTILIZED WHERE POSSIBLE

Institution: 

Runtime Prompts, or prompts are pop-up selection windows which appear when the Query is ran that asks the end user to select something from a list – for example, a specific Institution. Prompts will be discussed in detail later in the course; however it is important to keep in mind that prompts should be used as much as possible to increase the value of the Query. If a Query is developed for a specific institution with the institution number hard coded into the Query that Query will only ever be good for that institution, however if a prompt is used where the end user selects which institution they work for; the Query now becomes usable for everyone regardless of institution.



PERFORMANCE STANDARDS

The last thing the Data Analysis team will check is that the Query is efficient and does not take too long to run. Inefficient Queries can use up valuable resources. The best way to ensure your Query is efficient is to run it and verify that its run time is less than one minute.



USING QUERIES CREATED BY OTHERS

If you find a Query that is very close to what you need but not quite right, it is absolutely okay to use that Query as a base that you can then change to fit your needs. The caveat is that you must first **“Save As”** to save the Query to a new name which you can then modify. This includes your own Queries if the one you want to use is already in Production. Keep in mind that there are certain rules to follow for changing Queries already in production – which include Queries created by you. These rules will be discussed further in the training manual.



QUERY ORGANIZATION

Folders can be used to categorize and organize Queries. Queries may only be stored in one folder at a time. There is currently no nomenclature standardization at the time of the writing of this manual. In addition to Folders, users may also save Queries in a favorites list for easy access and organization.

CtcLink PS Query Maintenance Protocol



CHANGING QUERIES THAT ARE IN PEOPLESOFT PRODUCTION

Business Rule: Only under the below scenarios can a Query be modified once it's in PeopleSoft production. Any other scenario will result in a new Query being created.

- Prompt(s) can be added to limit result set. Prompt(s) must use a wildcard (%) or blank option so Query can be run as originally created.
- Field(s) can be added to the Query but not removed. New field(s) must not result in row duplication.
- The Query Definition should be updated to include a brief description of changes, change date, initials of Query developer and institution.

The modifications or Query creation must be done in the PQA (test) environment. Once the Query is tested and ready for migration to production, a migration request must be submitted using the Service Desk ticketing system. The Service Desk “Request Type” should be ERP Support > Data & Reporting > Reporting > Query Migration Request.

Modifications made to Queries should be logged into the Definition field. Users should input:

- The date of the change
- A description of the changes made
- Their name and email address

The Query modification information entered into the Query Definition in Query Properties will be included on the ctcLink Reporting Catalog and communicated to intended audience by Data Services.

PS Query Terms

Relational Database: A database system in which the database is organized and accessed according to the relationships between data items without the need for any consideration of physical orientation and relationship. Relationships between data items are expressed by means of tables (records).

Record/Table: Records/Tables are the foundation of the Query tool. A record stores data that is arranged by rows (entries) and columns (fields). For example, a record/table containing data about “people” would have a row for each individual person and columns (fields) for each piece of data stored for that individual (ex: name, address, phone). Records can be added to a Query from the “Records” tab.

Column/Field: In a database context, a field is the same as a column. For example, a record of people could contain separate fields such as name, address, phone, etc.

Query: A Query is a SQL SELECT statement that reads data from Records and views within the database, and returns the result set to the requester. PS Queries cannot change data within the database.

SQL: Structured Query Language (SQL) is a language that provides an interface to relational database systems. It was developed by IBM in the 1970s for use in System R. SQL is a de facto standard, as well as an ISO and ANSI standard. Some people pronounce SQL “sequel”.

Criteria: Specifying criteria in your Query allows you to set conditions which limit the results returned by the Query to only those data that you are interested in. Criteria are viewed and maintained on the “Criteria” tab. Example: You may want to set criteria to limit your Query to retrieve a relevant subset of data such as active undergraduate students as opposed to returning results for all active students.

Join: The process of combining data from two or more Records using matching keys.

Public Query: Public Queries are viewable and editable by any user with access to Query Manager and the proper Record access. Public Queries are available for use by many different users, so please do not save any changes that you make to a public Query.

Private Query: Private Queries are only viewable by the individual who created the Query.

Primary Key: A column in a Record whose values uniquely identify the rows in the Record. A primary key value cannot be NULL.

Foreign Key: A column in a Record that does NOT uniquely identify rows in that Record, but is used as a link to matching columns in other Records to indicate a relationship.

Definitions courtesy of <http://www.orafaq.com/>

Section

2

Using PeopleSoft Query

Accessing PS Query

Once you have logged into PeopleSoft there are three main areas in PS Query you will be able to access:

- Query Manager
- Query Viewer
- Schedule Query

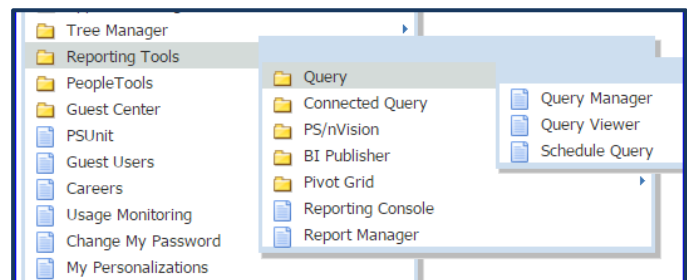
Query Manager is used to create and modify Queries and is only available to Query Developers.

Query Viewer is accessible by everyone with a PeopleSoft License and can be used to view Query output in HTML, Excel or XML. Users are also able to schedule a Query to run through Query Viewer.

Schedule Query is used exclusively for scheduling a Query to run at a future time or to run large results queries.

Use the following menu paths to access PS Query:

- Query Manager: Main Menu → Reporting Tools → Query → Query Manager
- Query Viewer: Main Menu → Reporting Tools → Query → Query Viewer
- Schedule Query: Main Menu → Reporting Tools → Query → Schedule Query

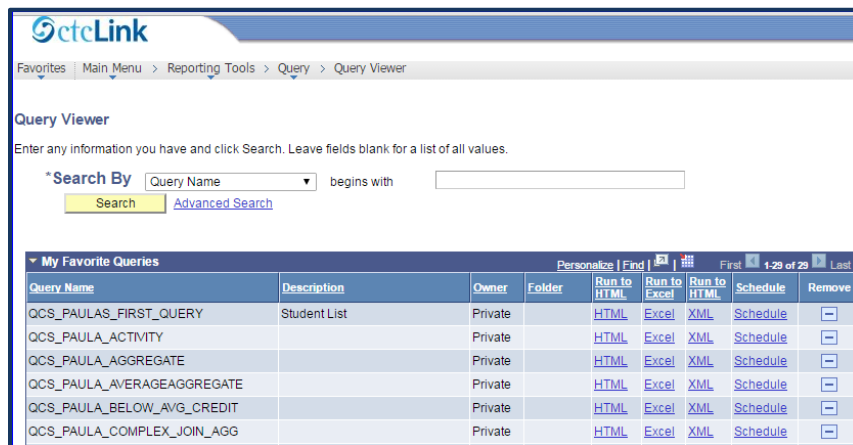


Using PeopleSoft Query Viewer

Query Viewer: Main Menu → Reporting Tools → Query → Query Viewer

The first screen of Query Viewer will give users the option to search for a Query as well as display any previously selected Favorite Queries.

Searching Using Query Viewer



Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

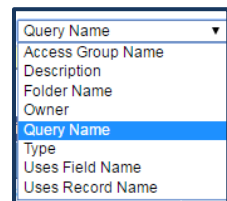
* Search By begins with

[Advanced Search](#)

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to HTML	Schedule	Remove
QCS_PAULAS_FIRST_QUERY	Student List	Private		HTML	Excel	XML	Schedule	-
QCS_PAULA_ACTIVITY		Private		HTML	Excel	XML	Schedule	-
QCS_PAULA_AGGREGATE		Private		HTML	Excel	XML	Schedule	-
QCS_PAULA_AVERAGEAGGREGATE		Private		HTML	Excel	XML	Schedule	-
QCS_PAULA_BELOW_AVG_CREDIT		Private		HTML	Excel	XML	Schedule	-
QCS_PAULA_COMPLEX_JOIN_AGG		Private		HTML	Excel	XML	Schedule	-

From this screen users are able to search using the Operator “Begins With” by multiple criteria including:

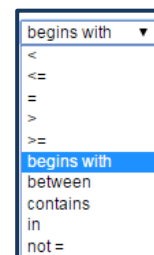
- Access Group Name
- Description
- Folder Name
- Owner
- Query Name
- Type
- Uses Field Name
- Uses Record Name



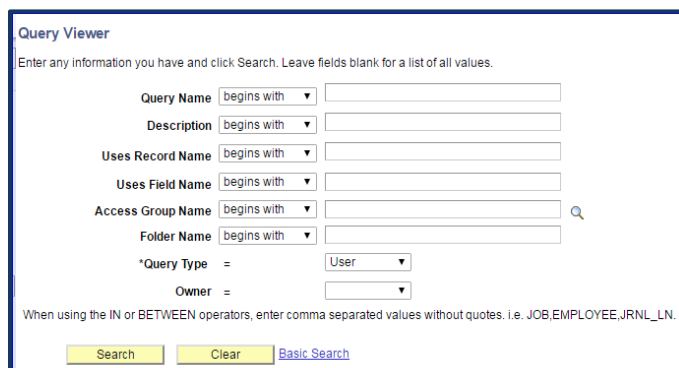
Query Name
Access Group Name
Description
Folder Name
Owner
Query Name
Type
Uses Field Name
Uses Record Name

In addition there is an Advanced Search capability where even more search functionality is available including different Operators such as:

- <
- <=
- =
- >
- >=
- Begins With
- Between
- Contains
- In
- Not =



begins with
<
<=
=
>
>=
begins with
between
contains
in
not =



Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

Query Name

Description

Uses Record Name

Uses Field Name

Access Group Name

Folder Name

*Query Type =

Owner =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB.EMPLOYEE_JRNL_LN.

[Basic Search](#)

Searching Using Wildcards

PeopleSoft allows users to use wildcards in place of a single space by using `_` or in place of everything following the wildcard by using `%`.

`_` matches any single character. For example, `_ones` matches any five-character string ending with "ones", such as "Jones" or "Cones".

`%` matches any string of zero or more characters. For example, `C%` matches any string starting with C, including C alone.

Query Viewer Options

Users are able to further refine search results by selecting folders from the *Folder View* field.



The Query results allow for users to run the results of the Query to:

- HTML
- Excel
- XML
- Schedule

Note that this is also where regularly accessed Queries can be added to Favorites by simply clicking on the "Favorite" hyperlink.

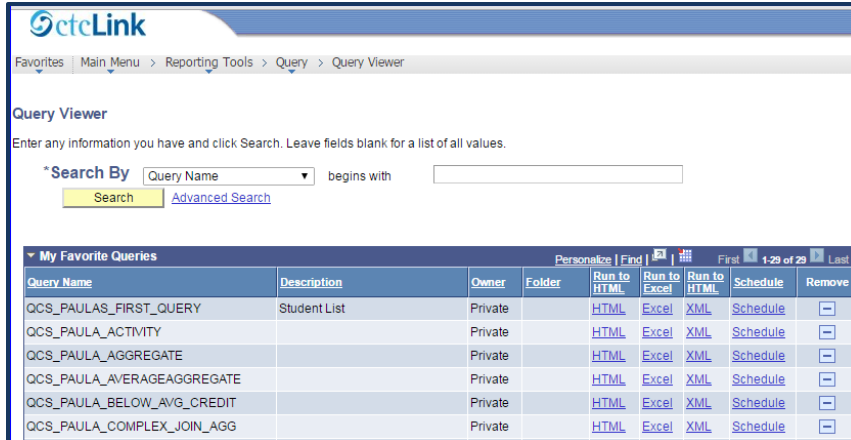
Query								
Personalize Find View 30 First 1-5 of 5 Last								
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
CTC_AD_3CEngine_DEIN	3CEngine PSQry - Selective Adm	Public	ADMISSIONS	HTML	Excel	XML	Schedule	Favorite
CTC_AD_3CEngine_RESID	3C Engine PopSel Query	Public	ADMISSIONS	HTML	Excel	XML	Schedule	Favorite
CTC_AD_COMMGEN	Comm Gen Pop Select Query	Public	ADMISSIONS	HTML	Excel	XML	Schedule	Favorite
CTC_AD_COMMGEN.CG	CommDataSource - ADMA	Public	ADMISSIONS	HTML	Excel	XML	Schedule	Favorite
CTC_AD_COMMGEN_SEL_ADM	CommDataSource -Sel Adm	Public	ADMISSIONS	HTML	Excel	XML	Schedule	Favorite

Using PeopleSoft Query Manager

Query Manager: Main Menu → Reporting Tools → Query → Query Manager

The first screen of Query Manager will give users the option to search for a Query as well as display any previously selected Favorite Queries.

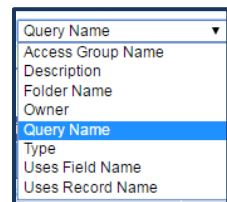
Searching Using Query Manager



The screenshot shows the 'Query Viewer' page. At the top, there's a breadcrumb trail: 'Favorites | Main Menu > Reporting Tools > Query > Query Viewer'. Below this, a section titled 'Query Viewer' contains the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There is a search bar with a dropdown menu set to 'Query Name' and a 'Search' button. Below the search bar is a table titled 'My Favorite Queries' with columns: Query Name, Description, Owner, Folder, Run to HTML, Run to Excel, Run to XML, Schedule, and Remove. The table lists several queries, including QCS_PAULAS_FIRST_QUERY, QCS_PAULA_ACTIVITY, QCS_PAULA_AGGREGATE, QCS_PAULA_AVERAGEAGGREGATE, QCS_PAULA_BELOW_AVG_CREDIT, and QCS_PAULA_COMPLEX_JOIN_AGG.

From this screen users are able to search using the Operator “Begins With” by multiple criteria including:

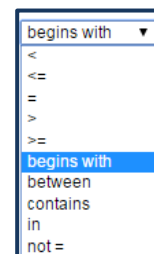
- Access Group Name
- Description
- Folder Name
- Owner
- Query Name
- Type
- Uses Field Name
- Uses Record Name



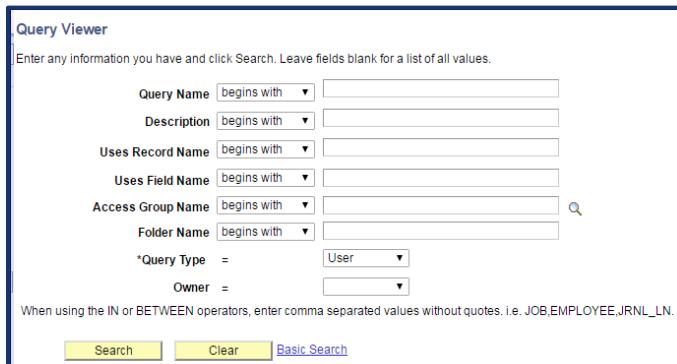
The screenshot shows a dropdown menu with the following options: Query Name, Access Group Name, Description, Folder Name, Owner, Query Name (highlighted), Type, Uses Field Name, and Uses Record Name.

In addition there is an Advanced Search capability where even more search functionality is available including different operators such as:

- <
- <=
- =
- >
- >=
- Begins With
- Between
- Contains
- In
- Not =



The screenshot shows a dropdown menu with the following operators: begins with (highlighted), <, <=, =, >, >=, between, contains, in, and not =.



The screenshot shows the 'Query Viewer' page with the 'Advanced Search' section. It contains several search criteria with dropdown menus set to 'begins with' and input fields: Query Name, Description, Uses Record Name, Uses Field Name, Access Group Name, Folder Name, *Query Type (set to User), and Owner. There is a 'Search' button and a 'Clear' button. Below the search fields, a note states: 'When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.'

Searching Using Wildcards

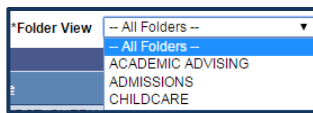
PeopleSoft allows users to use wildcards for either a single space by using `_` or everything following the wildcard by using `%`.

`_` matches any single character. For example, `_ones` matches any five-character string ending with "ones", such as "Jones" or "Cones".

`%` matches any string of zero or more characters. For example, `C%` matches any string starting with C, including C alone.

Query Manager Options

Users are able to further refine search results by selecting Folders from the *Folder View* field.



The Query results allow for users either edit the Query or run the results of the Query to:

- HTML
- Excel
- XML
- Schedule

Remember that if editing a Query, users must first save the Query under a new name in order not to overwrite any existing data by selecting "Save As". Please see the [Using Queries Created by Others](#) section of this document for more information.

In addition Query Manager allows for users to take certain actions on Queries. To the left of the list of results are checkboxes.

Query					Personalize Find View All First 1-5 of 5 Last				
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input type="checkbox"/>	CTC_AD_3CEENGINE_DEIN	3CEngine PSQry - Selective Adm	Public	ADMISSIONS	Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	CTC_AD_3CEENGINE_RESID	3C Engine PopSel Query	Public	ADMISSIONS	Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	CTC_AD_COMMGEN	Comm Gen Pop Select Query	Public	ADMISSIONS	Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	CTC_AD_COMMGEN_CG	CommDataSource - ADMA	Public	ADMISSIONS	Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	CTC_AD_COMMGEN_SEL_ADM	CommDataSource -Sel Adm	Public	ADMISSIONS	Edit	HTML	Excel	XML	Schedule

One or multiple Queries can be selected. You can then bring up the list of available actions by selecting the drop down menu from the *Actions* field.

<input type="button" value="Check All"/>		<input type="button" value="Uncheck All"/>		*Action		<div>-- Choose --<div><div>-- Choose --</div><div>Add to Favorites</div><div>Copy to User</div><div>Delete Selected</div><div>Move to Folder</div><div>Rename Selected</div></div></div>
Query						
Select	Query Name	Descr	Own			
<input type="checkbox"/>	CTC_AD_3CEENGINE_DEIN	3CEngine PSQry - Selective Adm	Public		ADMISSIONS	Edit
<input type="checkbox"/>	CTC_AD_3CEENGINE_RESID	3C Engine PopSel Query	Public		ADMISSIONS	Edit
<input type="checkbox"/>	CTC_AD_COMMGEN	Comm Gen Pop Select Query	Public		ADMISSIONS	Edit
<input type="checkbox"/>	CTC_AD_COMMGEN_CG	CommDataSource - ADMA	Public		ADMISSIONS	Edit
<input type="checkbox"/>	CTC_AD_COMMGEN_SEL_ADM	CommDataSource -Sel Adm	Public		ADMISSIONS	Edit

Available actions are:

- Add to Favorites
- Copy to User
- Delete Selected
- Move to Folder
- Rename Selected

The *Schedule Query* page will display. The Query name will automatically populate based on the Query selected from Query Viewer or Query Manager. Enter a description for the Query Run Control ID in the *Description* Field. This will be the Report Name.

Note: if there are prompts (parameters) for the *Run Control ID* they can be updated here by clicking Update Parameters. You can save these changes to the Run Control ID by clicking “Save”. This will not, however, schedule the Query. To schedule the Query click on “Apply”.

Schedule Query

Run Control ID: pm_081816_training_demo Report Manager Process Monitor

Query Name: QFS_TRAIN_CUSTOMER

*Description: Training Demonstration

Update Parameters

Prompt Name	Value
SETID	WACTC
ADD_DT	1997-08-04
	2016-08-18

OK Cancel **Apply**

The *Process Scheduler Request* page will display. Select the Time Zone, Date and Time to run the Query.

Process Scheduler Request

User ID: CTC_PMC DANIEL Run Control ID: PM_06302016_BELOW_AVG_CREDIT

Server Name: [Dropdown] **Run Date**: 06/30/2016 **Run Time**: 3:00:30PM Reset to Current Date/Time

Recurrence: [Dropdown]

Time Zone: PST Pacific Time (US)

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web	HTM	Distribution

OK Cancel

The Output Type and Format can also be selected here.

Output Types available are:

***Type**

- Web
- Email
- Feed
- File
- IB Node
- Web

Format Types available are:

***Format**

- HTM
- HTM
- PDF
- TXT
- XFORM
- XLS
- XML
- XMLP

Click “OK”.

You will return to the *Schedule Query* page. Notice there is now a Process Instance number now associated with this Scheduled Query.

PROCESS MONITOR

To view the status of your Scheduled Query click the “Process Monitor” hyperlink.

The Process Monitor will display the status of the Scheduled Query.

You are able to see the status of Scheduled Query runs by:

- | | | |
|--|--|---|
| <ul style="list-style-type: none"> • User ID • Type • Number of days past | <ul style="list-style-type: none"> • Server • Name • Instance from and to | <ul style="list-style-type: none"> • Run Status • Distribution Status |
|--|--|---|

Click on “Save” to return to the previous page.

Another way to access the Process Monitor is through the menu path: Main Menu> PeopleTools> Process Scheduler> Process Monitor

Once the Query has run and you see a status of “Success” click on “Go back to Scheduled Query”. This will return you to the first Scheduled Query search page. Note that your *Run Control ID* is filled in so to get to the Scheduled Query page to view the report via Report Manager click on “Enter”. Click on the *Report Manager* hyperlink to view the Report.

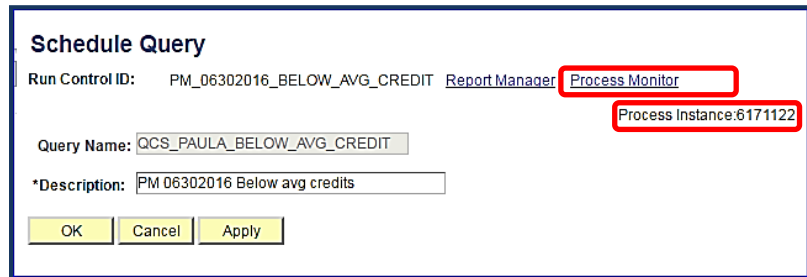
REPORT MANAGER

Report Manager allows the user to filter displayed reports by:

Folder
 Instance from and to
 Name
 Created on Date
 Number of Days past
 Date Range

Another way to access the Report Manager is through the menu path: Main Menu> ReportingTools> Report Manager

Click on the Description found in the *Report* column to view the output.



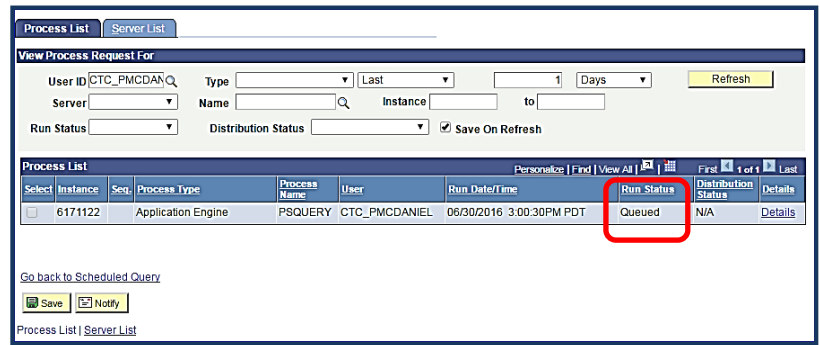
Schedule Query

Run Control ID: PM_06302016_BELOW_AVG_CREDIT [Report Manager](#) [Process Monitor](#)

Query Name: QCS_PAULA_BELOW_AVG_CREDIT

*Description: PM 06302016 Below avg credits

OK Cancel Apply



Process List | Server List

View Process Request For

User ID: CTC_PMC DAN Q Type: Last 1 Days Refresh

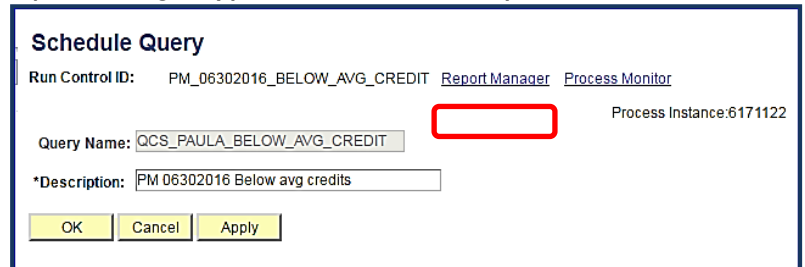
Server: Name: Instance: to: Run Status: Distribution Status: Save On Refresh

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	6171122		Application Engine	PSQUERY	CTC_PMC DANIEL	06/30/2016 3:00:30PM PDT	Queued	N/A	Details

Go back to Scheduled Query

Save Notify

Process List | Server List



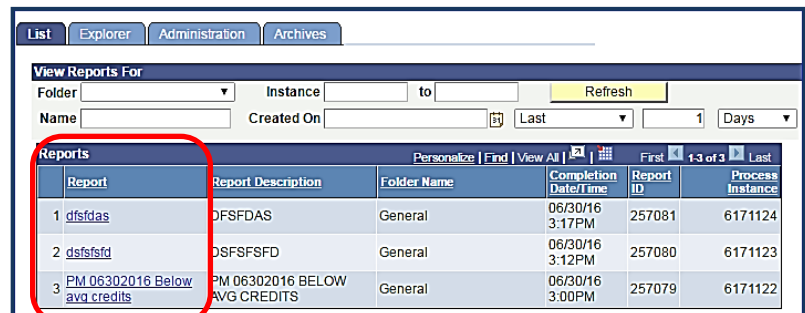
Schedule Query

Run Control ID: PM_06302016_BELOW_AVG_CREDIT [Report Manager](#) [Process Monitor](#)

Query Name: QCS_PAULA_BELOW_AVG_CREDIT

*Description: PM 06302016 Below avg credits

OK Cancel Apply



List Explorer Administration Archives

View Reports For

Folder: Instance: to: Refresh

Name: Created On: Last 1 Days

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 dlsfdas	DSFSDAS	General	06/30/16 3:17PM	257081	6171124
2 dsfsfsfd	DSFSFSFD	General	06/30/16 3:12PM	257080	6171123
3 PM 06302016 Below avg credits	PM 06302016 BELOW AVG CREDITS	General	06/30/16 3:00PM	257079	6171122

The Query results can be viewed in the selected format by clicking on the Query Name in the **Name** column.

Report		
Report ID:	257079	Process Instance: 6171122 Message Log
Name:	PSQUERY	Process Type: Application Engine
Run Status:	Success	
PM 06302016 Below avg credits		
Distribution Details		
Distribution Node:	local	Expiration Date: 07/30/2016
File List		
Name	File Size (bytes)	Datetime Created
AE_PSQUERY_6171122.AET	896	06/30/2016 3:00:55.563632PM PDT
AE_PSQUERY_6171122.log	717	06/30/2016 3:00:55.563632PM PDT
QCS_PAULA_BELOW_AVG_CREDIT-6171122.html	6,858	06/30/2016 3:00:55.563632PM PDT
Distribute To:		
Distribution ID Type	Distribution ID	
User	CTC_PMC DANIEL	

Scheduling a Query to Run Through Schedule Query

Navigate to the *Schedule Query* page by following this menu path: Main Menu → Reporting Tools → Query → Schedule Query

You will be brought to the page to search for an existing Scheduled Query via:

- Description
- Query Name
- Run Control ID

Schedule Query

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)
[Add a New Value](#)

▼ Search Criteria

Search by: Run Control ID begins with

☐ Case Sensitive

Description
 Query Name
 Run Control ID

[Search](#)
[Advanced Search](#)

Click on the **Add a New Value** tab to create a new Scheduled Query Run.

Enter a *Run Control ID* in the Field. There is no specific naming convention for the *Run Control ID* but it is recommended to use the date and description (making sure to use underscore in place of spaces).

Once the *Run Control ID* has been entered click on the “Add” button.

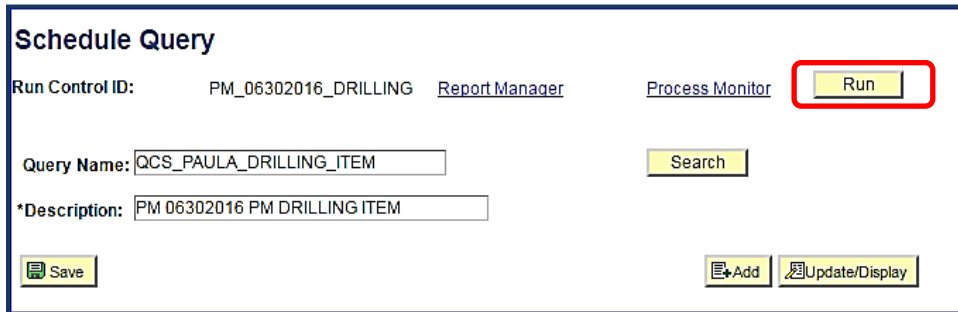
Schedule Query

[Find an Existing Value](#)
[Add a New Value](#)

Run Control ID:

[Add](#)

The *Schedule Query* page will display. Search for the correct Query and add a Run Control ID description.



Schedule Query

Run Control ID: PM_06302016_DRILLING [Report Manager](#) [Process Monitor](#) **Run**

Query Name: QCS_PAULA_DRILLING_ITEM **Search**

*Description: PM 06302016 PM DRILLING ITEM

Save **Add** **Update/Display**

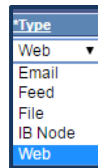
Note: Clicking on “Save” will save the Run Control ID for the Scheduled Query request however it will NOT schedule the Query run. To schedule the Query run, click on “Run”. Note that this is different than when accessing Schedule Query through Query Viewer or Query Manager.

The *Process Scheduler Request* page will display.

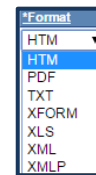
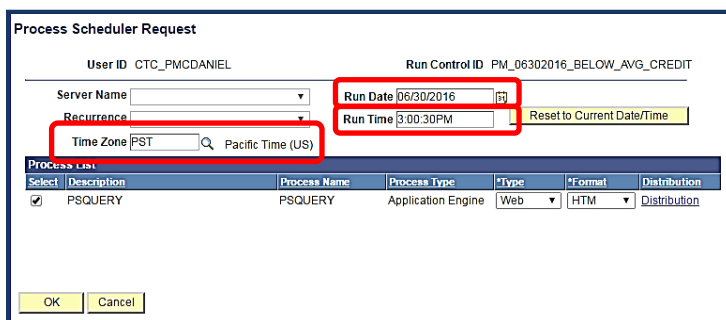
Select the Time Zone, Date and Time to run the Query.

The Output Type and Format can also be selected here.

Output Types available are:



Format Types available are:

Process Scheduler Request

User ID: CTC_PMC DANIEL Run Control ID: PM_06302016_BELOW_AVG_CREDIT

Server Name: [Dropdown] **Run Date** 06/30/2016 **Run Time** 3:00:30PM **Reset to Current Date/Time**

Recurrence: [Dropdown] **Time Zone** PST Pacific Time (US)

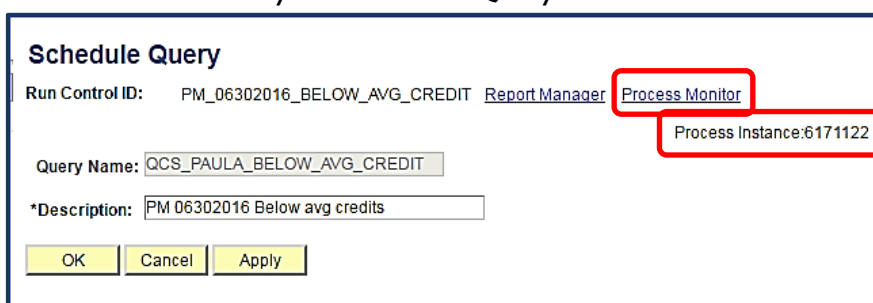
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web	HTM	Distribution

OK **Cancel**

Click “OK”.

You will return to the *Schedule Query* page. Notice there is now a Process Instance number now associated with this Scheduled Query.

To view the status of your Scheduled Query click the “Process Monitor” hyperlink.



Schedule Query

Run Control ID: PM_06302016_BELOW_AVG_CREDIT [Report Manager](#) [Process Monitor](#) **Process Instance: 6171122**

Query Name: QCS_PAULA_BELOW_AVG_CREDIT

*Description: PM 06302016 Below avg credits

OK **Cancel** **Apply**

PROCESS MONITOR

To view the status of your Scheduled Query click the “Process Monitor” hyperlink.

The Process Monitor will display the status of the Scheduled Query.

You are able to see the status of Scheduled Query runs by:

- User ID
- Type
- Number of days past

- Server
- Name
- Instance from and to

- Run Status
- Distribution Status

Click on “Save” to return to the previous page.

Another way to access the Process Monitor is through the menu path: Main Menu> PeopleTools> Process Scheduler> Process Monitor

Once the Query has run and you see a status of “Success” click on “Go back to Scheduled Query”. This will return you to the first Scheduled Query search page. Note that your *Run Control ID* is filled in so to get to the Scheduled Query page to view the report via Report Manager click on “Enter”. Click on the *Report Manager* hyperlink to view the Report.

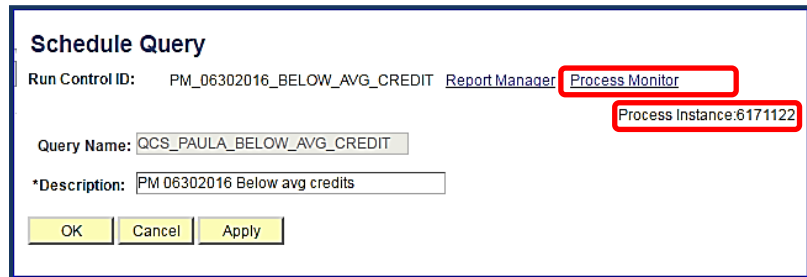
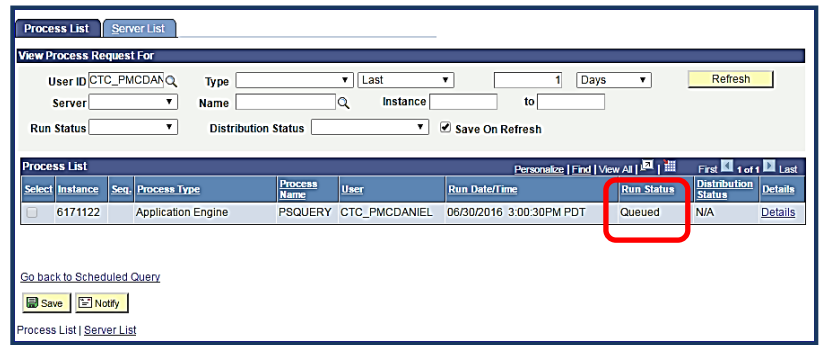
REPORT MANAGER

Report Manager allows the user to filter displayed reports by:

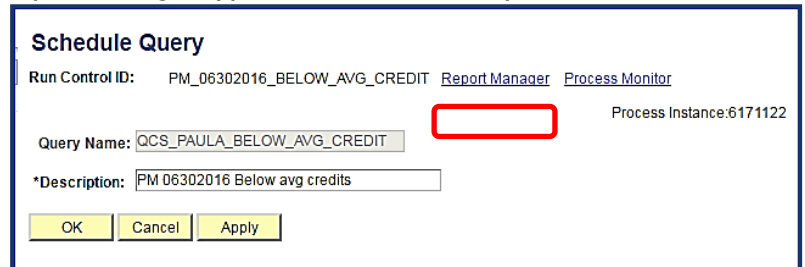
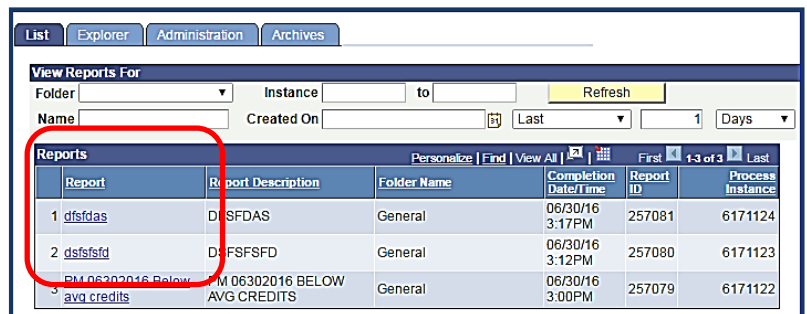
Folder
 Instance from and to
 Name
 Created on Date
 Number of Days past
 Date Range

Another way to access the Report Manager is through the menu path: Main Menu> ReportingTools> Report Manager

Click on the Description found in the *Report* column to view the output.

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	6171122		Application Engine	PSQUERY	CTC_PMC DANIEL	06/30/2016 3:00:30PM PDT	Queued	N/A	Details

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 dfsfdas	D:\FSFDAS	General	06/30/16 3:17PM	257081	6171124
2 dfsfsfd	D:\FSFSD	General	06/30/16 3:12PM	257080	6171123
3 PM 06302016 Below avg credits	PM 06302016 BELOW AVG CREDITS	General	06/30/16 3:00PM	257079	6171122

The Query results can be viewed in the selected format by clicking on the Query Name in the *Name* column.

Report		
Report ID:	257079	Process Instance: 6171122 Message Log
Name:	PSQUERY	Process Type: Application Engine
Run Status:	Success	
PM 06302016 Below avg credits		
Distribution Details		
Distribution Node:	local	Expiration Date: 07/30/2016
File List		
Name	File Size (bytes)	Datetime Created
AE_PSQUERY_6171122.AET	896	06/30/2016 3:00:55.563632PM PDT
AE_PSQUERY_6171122.log	717	06/30/2016 3:00:55.563632PM PDT
QCS_PAULA_BELOW_AVG_CREDIT-6171122.html	6,858	06/30/2016 3:00:55.563632PM PDT
Distribute to		
Distribution ID Type	*Distribution ID	
User	CTC_PMC DANIEL	

Scheduling a BI Publisher Report

Some Queries are used as a data source for BI Publisher. BI Publisher will format the Query into a formalized report. To run a BI Publisher report that uses Query or Connected Query as a data source navigate to Query Report Scheduler by going to Reporting Tools → BI Publisher → Query Report Scheduler.

Either add a new Run Control ID or search for an existing one. If creating a new Run Control ID you will need to enter the Run Control ID and click on Add.

This will bring you to the Query Report Scheduler page where you will search for the desired Report. Select either Query or Connected Query as the Data Source Type.

Query Report Scheduler			
Run Control ID:	BIP_Run_ID	Report Manager	Process Monitor
Language:	English		
Run			
Report Definition			
Data Source Type:	Query		
Report Name:	<input type="text"/> Connected Query Query		
Template ID:	<input type="text"/>		
Template As Of Date:	<input type="text"/>	Channel:	

Click on the magnifying glass to the right of the Report Name Field to search.

Query Report Scheduler			
Run Control ID:	BIP_Run_ID	Report Manager	Process Monitor
Language:	English		
Run			
Report Definition			
Data Source Type:	Query		
Report Name:	<input type="text"/> <input type="button" value="🔍"/>		
Template ID:	<input type="text"/>		
Template As Of Date:	<input type="text"/>	Channel:	
Go to BIP Report Search			
Save		Notify	
		Add Update/Display	

If there are prompts in the Query or Connected Queries, fill them out.

Note: If using Connected Query as a data source ensure to fill out the prompts with the same information in each Query. While it is technically not necessary to fill out the prompts in each Query it is recommended to do so. The only requirement is to fill in the prompts in the first Query after which PeopleSoft Query will automatically fill in the same information in each subsequent Query however, this is very resource intensive and so the recommendation is to fill in the same information in each subsequent Query. Below is an example of a Connected Query which is comprised of three Queries. Note that the prompt values for each Query are an exact match.

	Query Name	Prompt Name	Prompt Value
1	QCS_SR_FTESFUNDSRC_CQ1	INSTITUTION	WA220
2	QCS_SR_FTESFUNDSRC_CQ1	STRM	2167
3	QCS_SR_FTESFUNDSRC_CQ1	STRM	2165
4	QCS_SR_FTESFUNDSRC_CQ1	STRM	2163
7	QCS_SR_FTESFUNDSRC_SG_CQ2	INSTITUTION	WA220
8	QCS_SR_FTESFUNDSRC_SG_CQ2	STRM	2167
9	QCS_SR_FTESFUNDSRC_SG_CQ2	STRM	2165
10	QCS_SR_FTESFUNDSRC_SG_CQ2	STRM	2163
38	QCS_SR_FTESFUNDSRC_SG_CQ3	INSTITUTION	WA220
39	QCS_SR_FTESFUNDSRC_SG_CQ3	STRM	2167
40	QCS_SR_FTESFUNDSRC_SG_CQ3	STRM	2165
41	QCS_SR_FTESFUNDSRC_SG_CQ3	STRM	2163

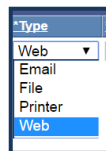
Click on Run to run the BI Publisher report.

The *Process Scheduler Request* page will display.

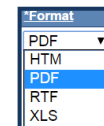
Select the Time Zone, Date and Time to run the Query.

The Output Type and Format can also be selected here.

Output Types available are:



Format Types available are:



Process Scheduler Request

User ID CTC_PMC DANIEL
 Run Control ID STUDENT_GROUPS_FTE_REPORT

Server Name
 Run Date 11/03/2016

Recurrence
 Run Time 4:09:45PM
 [Reset to Current Date/Time](#)

Time Zone

Process List

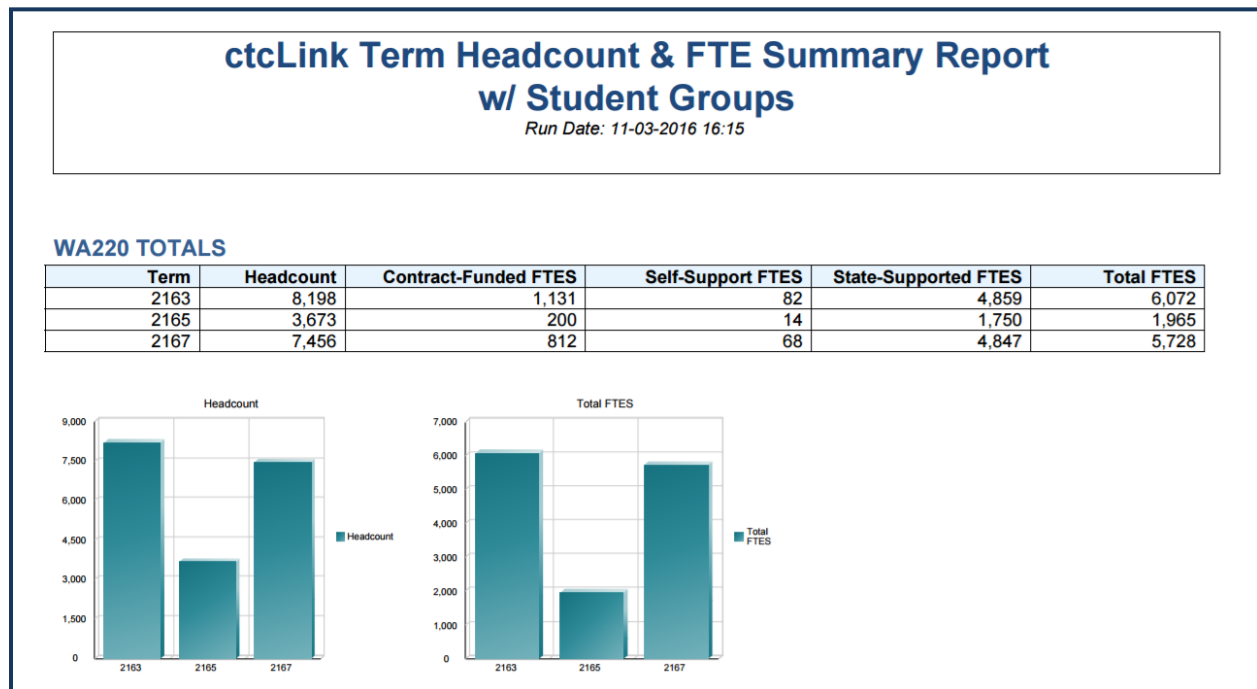
Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	BI Publisher Query Report	PSXPQRYRPT	BI Publisher	Web	PDF	Distribution

Click "OK".

You will return to the *Query Report Scheduler* page. Notice there is now a Process Instance number now associated with this Scheduled BI Publisher Report.

To view the status of your Scheduled Query click the “Process Monitor” hyperlink or navigate through the menu path to the Process Monitor. Main Menu> PeopleTools> Process Scheduler> Process Monitor

To view the BI Publisher report click on the “Report Manager” hyperlink or navigate through the menu path to the Report Manager. Main Menu> ReportingTools> Report Manager



Creating a Simple Query

A simple Query uses only a single Record to create the Query. To create a simple Query, navigate to Query Manager. The initial page will display search functionality that will allow you to find existing Queries. It is recommended to always first search for an existing Query that will meet your needs before developing new Queries. Please see the [Search for Existing Queries Before Developing New Queries](#) section of this document for further information. If, after searching, you do not find a suitable Query then click on "Create New Query".

Query Manager

Enter any information you have and click Search. Leave fields blank for a list of all values.

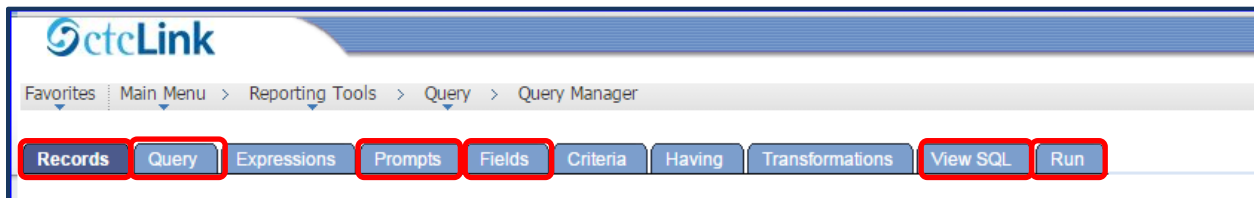
Find an Existing Query | **Create New Query**

*Search By: Query Name ▼ begins with

[Advanced Search](#)

This will take you to the main Query development page. There are 10 tabs available for use in creating Queries – for the purpose of this guide we will discuss only the following tabs:

- Records
- Query
- Prompts
- Fields
- View SQL
- Run



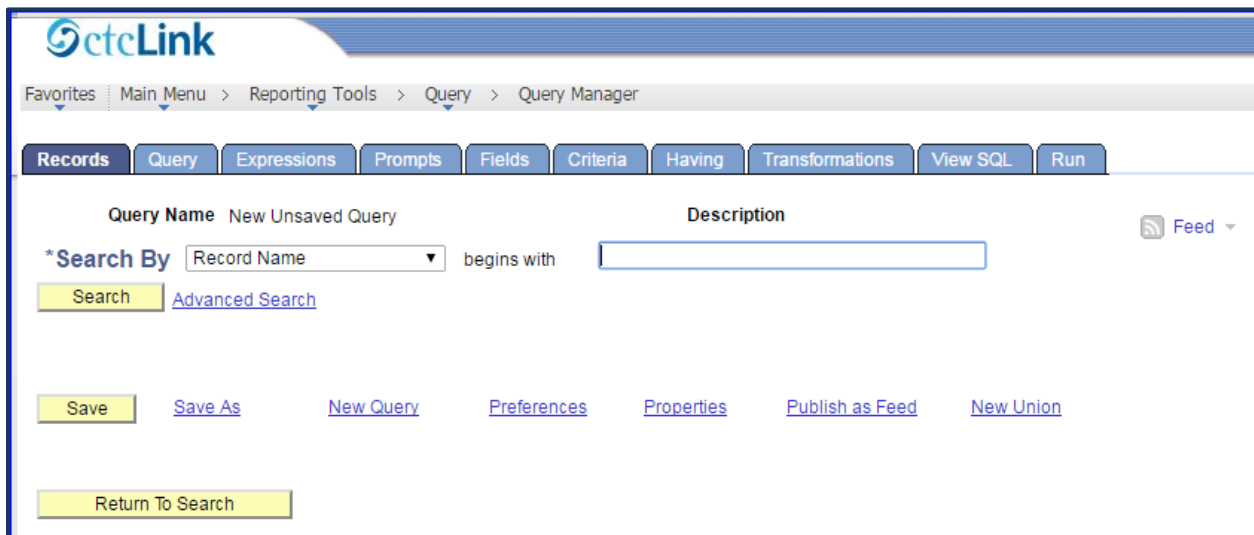
The other tabs are for more advanced developing in PS Query and will be discussed in other trainings/guides.

The Records Tab

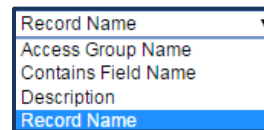
Keeping in mind that a Query is a compilation of fields, the first thing to do is to find the fields to be used. Fields live in Records so it follows that in order to find the correct fields we must find the Records they live in.

To do this we go to the Records tab (note that when "Create New Query" is clicked the system will automatically take you to the Records tab).

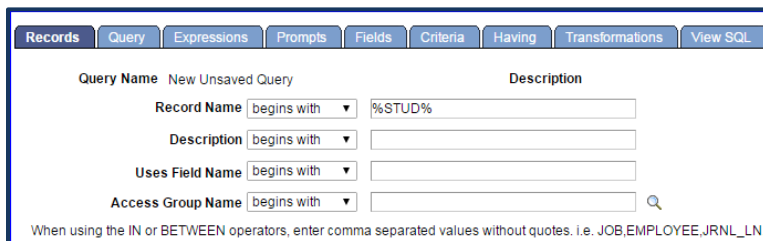
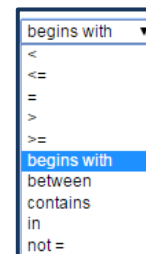
SEARCHING RECORDS



There are two search options in the Records tab: Basic and Advanced. The basic search allows the Operator “Begins With” and the options of:



The advanced search allows multiple Operators with the same options as the basic search. Wildcards are available for use in both search types.

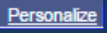




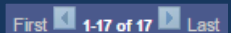



Click on “Search” to display the list of Records.



Search Results		
Record	Personalize Find View All	First 1-17 of 17 Last
Recname	Add Record	Show Fields
EDUC_AREA_STUDY - School Area of Study - GER	Add Record	Show Fields
INST_STUDENT - Institutional Student App Data	Add Record	Show Fields
ISIR_STUDENT - Fed Student Application Data	Add Record	Show Fields
PERS_STUDENT_VW - EE Student Search View	Add Record	Show Fields
SFA_COD_STUDENT - COD Student Information	Add Record	Show Fields

USING THE LIST OF RECORDS

The Title Bar has some options available for how you would like to view the list.

- Personalize – allows options on viewing the results in a particular order 
- Find – will cut the results displayed 
- View – will give option to view all, 100 records or 20 records 
- Zoom – creates a pop out window where the results display 
- Download - allows results to be downloaded to xls file 
- Navigation – give options to navigate the pages of results 



Search Results

Record	Personalize Find View All   First 1-17 of 17 Last
Recname	Add Record Show Fields
EDUC_AREA_STUDY - School Area of Study - GER	Add Record Show Fields
INST_STUDENT - Institutional Student App Data	Add Record Show Fields
ISIR_STUDENT - Fed Student Application Data	Add Record Show Fields
PERS_STUDENT_VW - EE Student Search View	Add Record Show Fields
SFA_COD_STUDENT - COD Student Information	Add Record Show Fields

From the list of records users are able to either "Add Record" or "Show Fields".

"Show Fields" will display the Record and all the Fields that comprise the Record. Note that the Key Fields are indicated with a Y in the Key column.

Fields for record AAP_TBL - Affirmative Action Plan Table:

Fieldname	Personalize Find   First 1-3 of 3 Last
Key	Description
Y	ESTABID - Establishment ID
	ESCR - Description
	AAP_RESPONSIBLE_ID - Person Responsible

[Return](#)

Click on "Return" to go back to the list of Records.

"Add Record" will take the user to the Query tab and allow the user to select which Fields to use in the Query.

Records Query Expressions Prompts Fields Criteria Having Transformations View SQL Run

Query Name New Unsaved Query Description

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.

Chosen Records	Fields
<p>Alias Record</p> <p>A STDNT_ENRL - Student Enrollment Table Hierarchy Join</p> <p>Check All Uncheck All</p>	<p>Find View All First 1-50 of 60 Last</p> <p><input type="checkbox"/> EMPID - Empl ID Join PEOPLE_SRCH - People Search View</p> <p><input type="checkbox"/> ACAD_CAREER - Academic Career Join STDNT_CAREER - Student Career</p> <p><input type="checkbox"/> INSTITUTION - Academic Institution Join INSTITUTION_TBL - Institution Table</p> <p><input type="checkbox"/> STRM - Term Join TERM_TBL - Term Definition Table</p> <p><input type="checkbox"/> CLASS_NBR - Class Nbr</p> <p><input type="checkbox"/> CRSE_CAREER - Course Career</p> <p><input type="checkbox"/> SESSION_CODE - Session</p> <p><input type="checkbox"/> SESSN_ENRL_CNTL - Enrollment Control Session</p> <p><input type="checkbox"/> STDNT_ENRL_STATUS - Student Enrollment Status</p> <p><input type="checkbox"/> ENRL_STATUS_REASON - Enrollment Status Reason</p> <p><input type="checkbox"/> ENRL_ACTION_LAST - Last Enrollment Action</p>

Note: Clicking "Return to Search" found at the very bottom of the Record will discard the current Record selection. A pop up window will appear where users can confirm this action.

[Return To Search](#)

Message

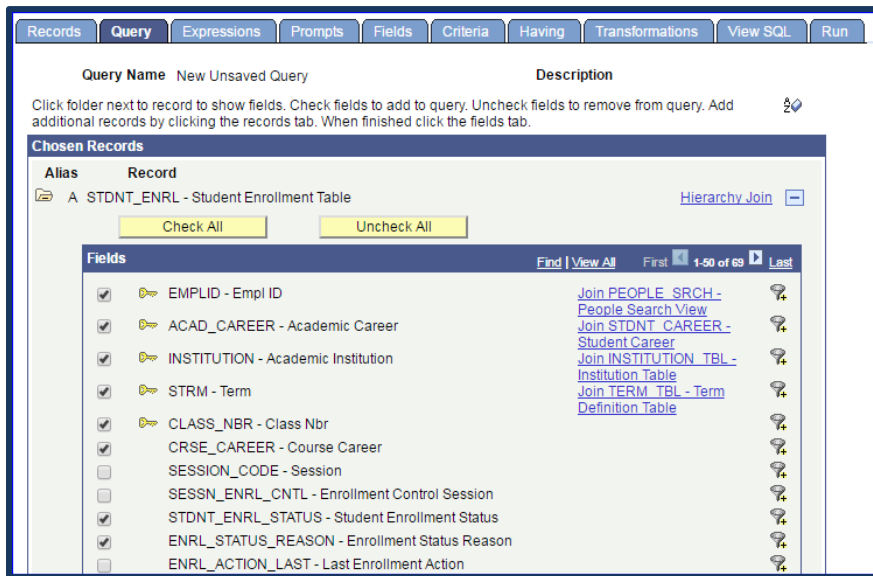
Discard current query? (all changes since the last save will be lost) (139,25)

[Yes](#) [No](#)

The Query Tab

The Query tab is where all Records being used in the Query are displayed. As this is a simple Query only a single Record will be displayed here.

Select the Fields to use in the Query by clicking in the checkbox to the left of the *Field Name*.



Records | **Query** | Expressions | Prompts | Fields | Criteria | Having | Transformations | View SQL | Run

Query Name: New Unsavd Query Description:

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.

Chosen Records

Alias	Record
A	STDNT_ENRL - Student Enrollment Table

Check All Uncheck All

Fields Find | View All First 1-50 of 69 Last

Field Name	Join
<input checked="" type="checkbox"/> EMPLID - Empl ID	Join PEOPLE_SRCH - People Search View
<input checked="" type="checkbox"/> ACAD_CAREER - Academic Career	Join STDNT_CAREER - Student Career
<input checked="" type="checkbox"/> INSTITUTION - Academic Institution	Join INSTITUTION_TBL - Institution Table
<input checked="" type="checkbox"/> STRM - Term	Join TERM_TBL - Term Definition Table
<input checked="" type="checkbox"/> CLASS_NBR - Class Nbr	
<input checked="" type="checkbox"/> CRSE_CAREER - Course Career	
<input type="checkbox"/> SESSION_CODE - Session	
<input type="checkbox"/> SESSN_ENRL_CNTL - Enrollment Control Session	
<input checked="" type="checkbox"/> STDNT_ENRL_STATUS - Student Enrollment Status	
<input checked="" type="checkbox"/> ENRL_STATUS_REASON - Enrollment Status Reason	
<input type="checkbox"/> ENRL_ACTION_LAST - Last Enrollment Action	


Note: Users are able to select or deselect all Fields quickly and easily by clicking the "Check All" or "Uncheck All" buttons.

Once the correct Record has been selected you will see some options appear at the bottom of the page. These options will now display across all the tabs but before moving on and making changes to the Query, it is a good idea to save it.



Save Save As New Query Preferences Properties Publish as Feed New Union

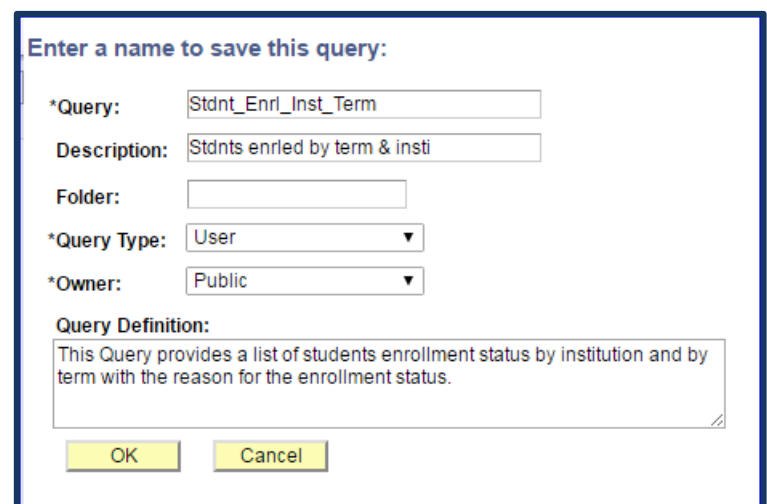
For new Queries simply click "Save".

 **Please note: if the Query is a modification of an existing Query select "Save As"**

You will be prompted to enter information regarding the Query. Required fields are denoted with an *.

Click "OK" to save.

The *Query Name* and *Definition* will now display at the top of every tab.



Enter a name to save this query:

*Query: Stdnt_Enrl_Inst_Term

Description: Stdnts enrled by term & insti

Folder:

*Query Type: User

*Owner: Public

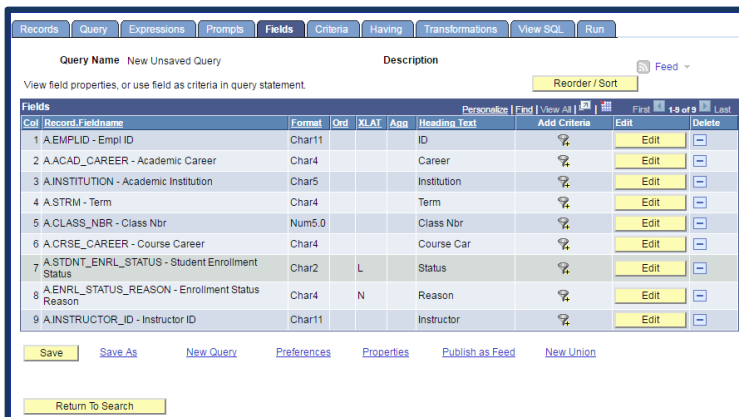
Query Definition:

This Query provides a list of students enrollment status by institution and by term with the reason for the enrollment status.

OK Cancel

The Fields Tab

Once the Fields to be used in the Query have been selected we can then determine how those Fields should be displayed. Clicking on the Fields tab will display a list of all of the Fields previously selected in the Query tab. Here we are able to reorder the display, determine sort order, change heading text and choose translate values, where applicable. In addition, as you continue your PS Query training and learn about more advanced options you will find the Field tab is where many advanced functions are started.

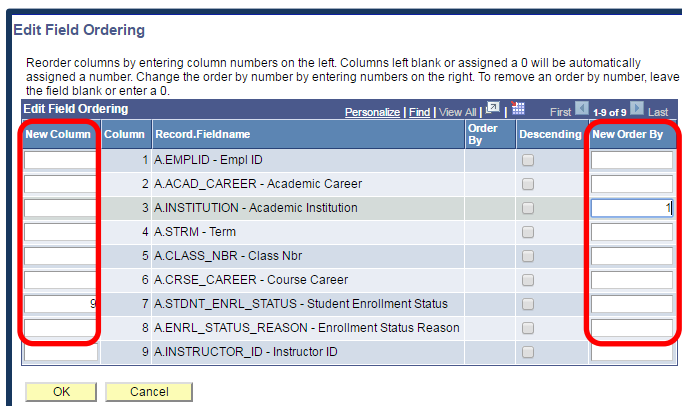


REORDER/SORT

Click on the "Reorder/Sort" button to select these options.

Reorder / Sort

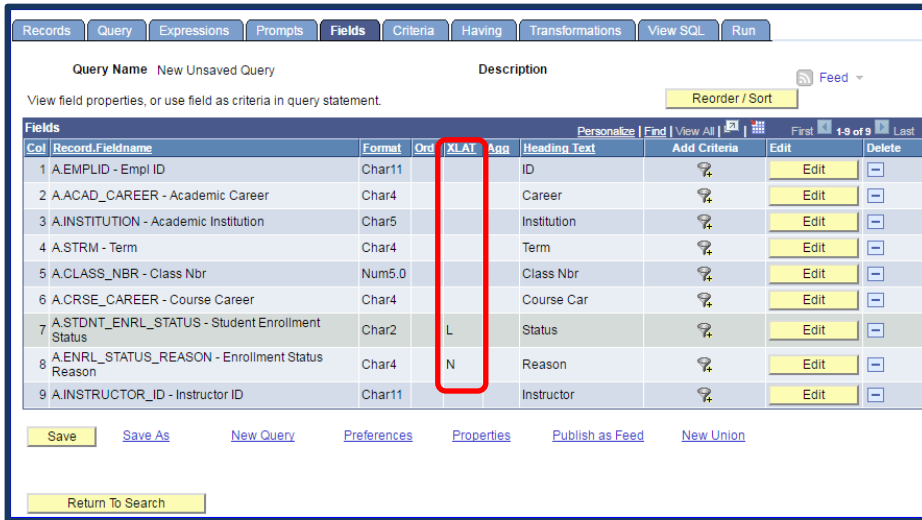
Each Field is numbered in the *Column* section and this number determines where the Field will be displayed in the list. To change the order, simply enter in the number of the column where you want the field to display in the *New Column* section. In the example below the Field **STDNT_ENRL_STATUS** was moved to column number 9 instead of column number 7.



You are also able to select sort order from this screen. In the example to the left a "New Order By" was selected to sort the results by Academic Institution. The results will be sorted in ascending order which is the default. To sort in descending order just click in the checkbox *Descending* next to the Field you want sorted. Had a previous sort order been determined it would be displayed in the *Order By* column. Multiple sorts are possible simply by selecting 1, 2 or 3 for example. When finished, click "OK"

to return to the Fields tab.

Next, let's select a Field that has an *XLAT* or *Translate Value* to edit. In the STDNT_ENRL Record the field STDNT_ENRL_STATUS has a *Translate Value* as done ENRL_STATUS_REASON. Click the "Edit" button next to either Field.

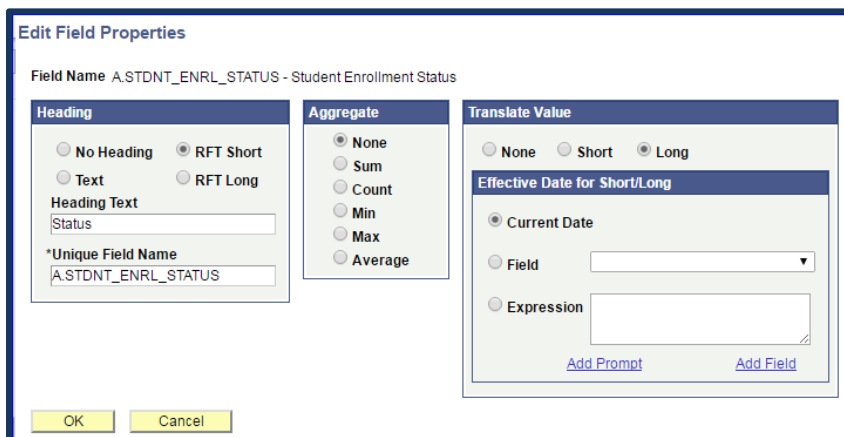


Col	Record_Fieldname	Format	Out	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.EMPLID - Empl ID	Char11				ID		Edit	
2	A.ACAD_CAREER - Academic Career	Char4				Career		Edit	
3	A.INSTITUTION - Academic Institution	Char5				Institution		Edit	
4	A.STRM - Term	Char4				Term		Edit	
5	A.CLASS_NBR - Class Nbr	Num5.0				Class Nbr		Edit	
6	A.CRSE_CAREER - Course Career	Char4				Course Car		Edit	
7	A.STDNT_ENRL_STATUS - Student Enrollment Status	Char2		L		Status		Edit	
8	A.ENRL_STATUS_REASON - Enrollment Status Reason	Char4		N		Reason		Edit	
9	A.INSTRUCTOR_ID - Instructor ID	Char11				Instructor		Edit	

EDITING DISPLAY OPTIONS

There are three options to modify if the Field has a *Translate Value* and only two options if there is not a *Translate Value*.

- *Heading*
- *Aggregate*
- *Translate Value*



Edit Field Properties

Field Name: A.STDNT_ENRL_STATUS - Student Enrollment Status

Heading

☐ No Heading ☒ RFT Short

☐ Text ☐ RFT Long

Heading Text: Status

*Unique Field Name: A.STDNT_ENRL_STATUS

Aggregate

☒ None

☐ Sum

☐ Count

☐ Min

☐ Max

☐ Average

Translate Value

☐ None ☐ Short ☒ Long

Effective Date for Short/Long

☒ Current Date

☐ Field: [Dropdown]

☐ Expression: [Text Area]

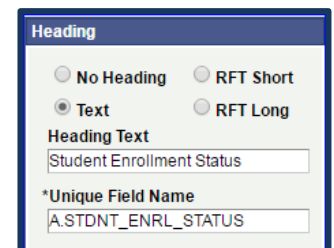
[Add Prompt](#) [Add Field](#)

OK Cancel

The *Heading* box allows the user to select "No Heading", "Short Heading", "Long Heading" or to type in a "Text Heading". The default Heading Text will display in the *Heading Text* Field. This display will change based on the selection. For example, if "No Heading" is selected then nothing will display in the *Heading Text* Field.

In the example to the right "Text" was selected and "Student Enrollment Status" was manually entered in the *Heading Text* Field.

Aggregate is a more advanced functionality and will be covered, in other training classes and guides. It is used to apply aggregates to the data.



Heading

☐ No Heading ☐ RFT Short

☒ Text ☐ RFT Long

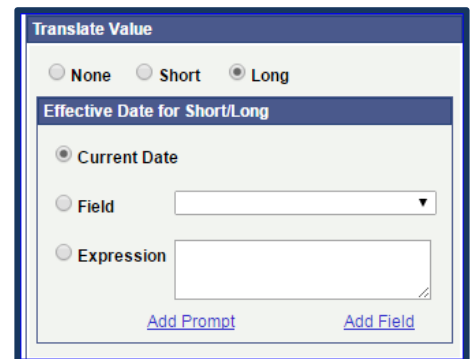
Heading Text: Student Enrollment Status

*Unique Field Name: A.STDNT_ENRL_STATUS

Translate Value is used for Fields that are able to read their display values from a translate table. The default is *None* which tells the system not use the translate table and to display the non-translated value. For example, the *Student Enrollment Status* field default values are E and D as shown here.

Student Enrollment Status
D
E
D
E

As this may not make sense to the final end user of the Query it is possible to look up the *Translate Value* and select a different option to display. In this example we will select *Long*.



Translate Value

☐ None
 ☐ Short
 ☒ Long

Effective Date for Short/Long

☒ Current Date
☐ Field
☐ Expression

[Add Prompt](#)
[Add Field](#)

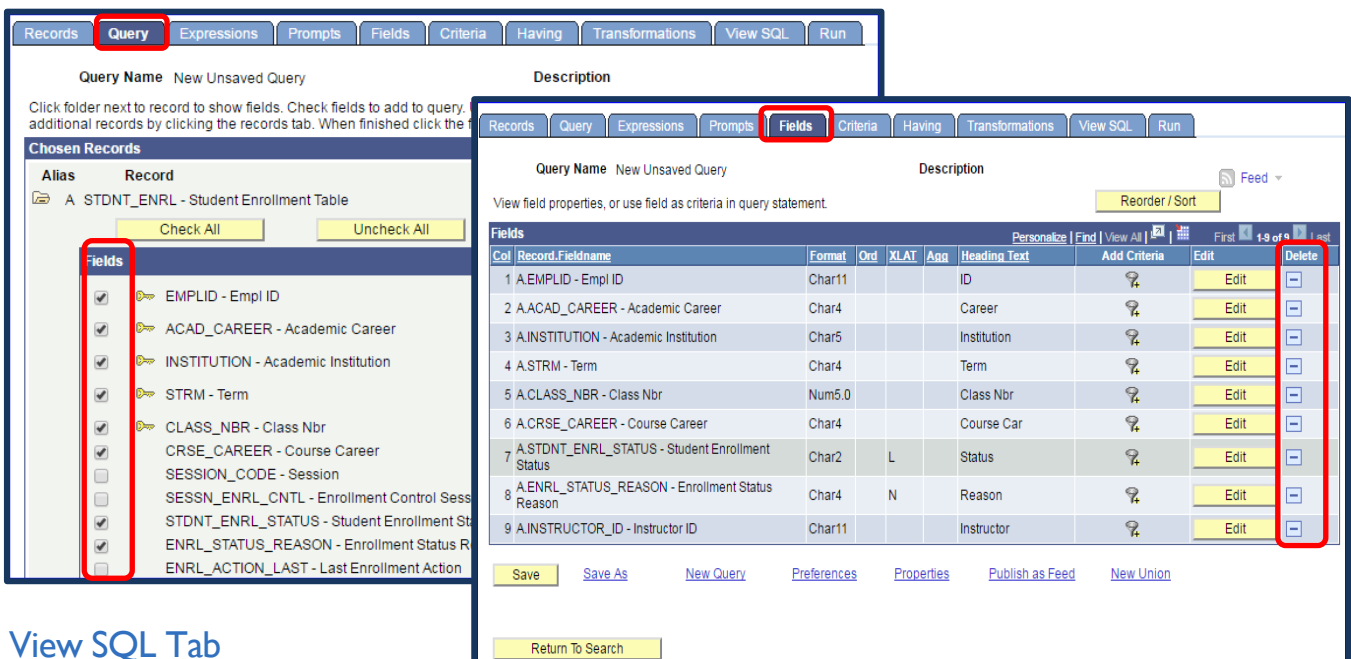
Now when we run the Query we will see the display values from the translate table which are much more user friendly.

Student Enrollment Status
Enrolled
Dropped
Enrolled
Enrolled

The *Effective Date for Short/Long* is more advanced functionality and will be covered in other training.

REMOVING FIELDS FROM A QUERY

To remove a field from the Query users can go back to the Query tab and de-select the checkbox next to the Field to be removed or from the Field tab click the "Minus Sign" icon next to the selected field.

The screenshot shows the Query Builder interface with the **Fields** tab selected. The **Fields** list on the left shows a list of fields with checkboxes. The **Fields** table on the right shows the selected fields with their properties and a **Delete** button.

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.EMPLID - Empl ID	Char11				ID		Edit	-
2	A.ACAD_CAREER - Academic Career	Char4				Career		Edit	-
3	A.INSTITUTION - Academic Institution	Char5				Institution		Edit	-
4	A.STRM - Term	Char4				Term		Edit	-
5	A.CLASS_NBR - Class Nbr	Num5.0				Class Nbr		Edit	-
6	A.CRSE_CAREER - Course Career	Char4				Course Car		Edit	-
7	A.STDNT_ENRL_STATUS - Student Enrollment Status	Char2		L		Status		Edit	-
8	A.ENRL_STATUS_REASON - Enrollment Status Reason	Char4		N		Reason		Edit	-
9	A.INSTRUCTOR_ID - Instructor ID	Char11				Instructor		Edit	-

View SQL Tab

Now that the display options have been selected it is time to review the SQL coding. To do this, simply click on the View SQL tab. This will allow users to review the SQL statements being used in the Query.

Records	Query	Expressions	Prompts	Fields	Criteria	Having	Transformations	View SQL	Run
---------	-------	-------------	---------	--------	----------	--------	-----------------	-----------------	-----

Query Name: New Unsaved Query Description:

Query SQL

```

SELECT A.EMPLID, A.ACAD_CAREER, A.INSTITUTION, A.STRM, A.CLASS_NBR, A.STDNT_ENRL_STATUS,
A.ENRL_STATUS_REASON, TO_CHAR(SYSDATE,'YYYY-MM-DD'), TO_CHAR(SYSDATE,'YYYY-MM-DD')
FROM PS_STDNT_ENRL A
ORDER BY 3

```

Feed ▾

Run Tab

You are now ready to run the Query and check how the results will display as well as how long it takes to run. Make sure to save any changes to the Query before running. Queries should never take over 1 minute to run and most should run much quicker than that. In order to run the Query, simply click on the Run tab. This will automatically start the process. You may receive a pop up message stating that the Query is returning too many results.

Message

Query Result Set too Large. (50,546)

Result of 'SQL Fetch' is over the maximum result size specified for the application server. Modify your query or increase the maximum result size.

OK

Click "OK" to view the results however consider adding a Prompt or other Criteria to narrow down the number of results.

VIEWING QUERY RESULTS

The results of the Query will display. Each row is numbered and each column is labeled in the way that was designated in the Field tab. In addition any *Translate Values* will display as indicated in the Field tab.

Records	Query	Expressions	Prompts	Fields	Criteria	Having	Transformations	View SQL	Run
---------	-------	-------------	---------	--------	----------	--------	-----------------	----------	-----

[View All](#) | [Rerun Query](#) | [Download to Excel](#) | [Download to XML](#)
First 1-100 of 21695 Last

	Student ID	Academic Career	Institution	Term	Class Number	Student Enrollment Status	Enrollment Status Reason
1	201058789	UGRD	WA171	2157	3540	Enrolled	Enrolled
2	201058789	UGRD	WA171	2157	3553	Enrolled	Enrolled
3	201058789	UGRD	WA171	2157	3515	Enrolled	Enrolled
4	201058789	UGRD	WA171	2157	3525	Enrolled	Enrolled
5	201058789	UGRD	WA171	2157	3100	Enrolled	Enrolled
6	201059135	UGRD	WA171	2157	2936	Enrolled	Enrolled
7	201059135	UGRD	WA171	2157	3992	Enrolled	Enrolled
8	201059135	UGRD	WA171	2157	3680	Enrolled	Enrolled
9	201034208	UGRD	WA171	2157	2669	Dropped	Dropped (was enrolled)
10	201059284	UGRD	WA171	2157	2867	Enrolled	Enrolled
11	201059284	UGRD	WA171	2157	3836	Enrolled	Enrolled
12	201059284	UGRD	WA171	2157	3859	Enrolled	Enrolled
13	201263705	UGRD	WA171	2157	3533	Enrolled	Enrolled
14	201057197	CNED	WA171	2157	3872	Dropped	Dropped (class cancelled)
15	201247001	UGRD	WA171	2157	3091	Dropped	Dropped (class cancelled)
16	201247001	UGRD	WA171	2157	3092	Dropped	Dropped (class cancelled)
17	201247001	UGRD	WA171	2157	3102	Enrolled	Enrolled
18	201247001	UGRD	WA171	2157	3108	Enrolled	Enrolled
19	201247001	UGRD	WA171	2157	3118	Dropped	Dropped (class cancelled)
20	201020532	UGRD	WA171	2157	1155	Enrolled	Enrolled
21	201020532	UGRD	WA171	2157	4469	Enrolled	Enrolled
22	201020847	UGRD	WA171	2157	4047	Enrolled	Enrolled
23	201020847	UGRD	WA171	2157	4030	Enrolled	Enrolled
24	201020847	UGRD	WA171	2157	4040	Enrolled	Enrolled
25	201020847	UGRD	WA171	2157	4050	Enrolled	Enrolled

From here users are able to:

- View All - see all the results in a single page
- Rerun Query
- Download to Excel

Creating Joins in PS Query

Joins are used to create Queries based on multiple records. Users manually link the records to retrieve the output. There are two types of Joins used by PS Query:

- Standard or Equivalent Joins
- Left Outer Joins

Joins normally **MUST** have a Key Field in common to be effective.

This means that if one record has a Key Field of Institution for example, the other record joined to the first must also have the Institution Field.

CARTESIAN JOINS

If there are no common Key Fields between records then PS Query will join the records but the result is what is called a Cartesian Join or a Cross Join. Each row of the first Record is paired with **ALL** of the rows of the second Record. This will produce an overwhelming number of results and data that makes no sense. Cartesian Joins are useful for testing but should generally never be used outside of that.

Note: There are instances where Records that do not have common Key Fields but do have common Fields are able to be joined. This is a more advanced process and will be covered in other trainings/guides.

Standard Join

Standard Joins match data only when a match occurs between the Field Keys. What this means is that if Record A has 10 rows of data when Record B is joined to it, only rows that have data in both Key Fields will be joined resulting in the possibility of not all rows in the Record B being displayed. Let's take a look at what that means in real life Query development. Our original Query returned 21,695 results.

Records	Query	Expressions	Prompts	Fields	Criteria	Having	Transformations	View SQL	Run
View All Rerun Query Download to Excel Download to XML First 1-100 of 21695 Last									
	Student ID	Academic Career	Institution	Term	Class Number	Student Enrollment Status	Enrollment Status Reason		
1	201058789	UGRD	WA171	2157	3540	Enrolled	Enrolled		
2	201058789	UGRD	WA171	2157	3553	Enrolled	Enrolled		
3	201058789	UGRD	WA171	2157	3515	Enrolled	Enrolled		
4	201058789	UGRD	WA171	2157	3526	Enrolled	Enrolled		

After performing a Standard Join to add the City and State to the Query there are now 16,411 results as not all of the rows had matching City/State information.

Records	Query	Expressions	Prompts	Fields	Criteria	Having	Transformations	View SQL	Run
View All Rerun Query Download to Excel Download to XML First 1-100 of 16411 Last									
	Student ID	Academic Career	Institution	Term	Class Number	Student Enrollment Status	Enrollment Status Reason	City	State
1	201020847	UGRD	WA171	2157	4057	Enrolled	Enrolled	Spokane	WA
2	201020847	UGRD	WA171	2157	4066	Enrolled	Enrolled	Spokane	WA
3	201020847	UGRD	WA171	2157	4074	Enrolled	Enrolled	Spokane	WA

The different Join types all have a purpose it is just important to understand exactly how they work and what the data will reflect.

Outer Join

This Join type will always return all of the rows in Record A. If there are non-matching fields in Record B then a value of NULL will be returned. In the example below 12,967 rows are returned with our simple Query.

Records Query Expressions Prompts Fields Criteria Having Transformations View SQL Run					
View All Rerun Query Download to Excel Download to XML					
First 1-100 of 12967 Last					
	ID	Institution	Term	Acad Load	
1	201091872	WA171	2163	L	
2	201093014	WA171	2163	L	
3	201056365	WA171	2163	N	
4	201128944	WA171	2163	N	

After doing a Left Outer Join to add the Name the Query results still display all 12,967 rows.

Records Query Expressions Prompts Fields Criteria Having Transformations View SQL Run					
View All Rerun Query Download to Excel Download to XML					
First 1-100 of 12967 Last					
	ID	Institution	Term	Acad Load	Name
1	201091872	WA171	2163	L	Bennett,Barbara J
2	201093014	WA171	2163	L	Holt,Bee Jay
3	201056365	WA171	2163	N	Tyrrell,Luke Alden
4	201128944	WA171	2163	N	Cash,Steven D

Creating a Join

There are three ways to create a join:

- Pre-Defined Join
- Hierarchy Join
- Any Join

PRE-DEFINED JOIN

Once a Record has been added to the Query you are able to see if there are any pre-defined joins by navigating to the Query tab. To the right of the Fields in the Record you will see any possible predefined joins.

Records

Query

Expressions

Prompts

Fields

Criteria

Having

Transformations

View SQL

Run

Query Name

FUN_WITH_JOINS

Description

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.

Chosen Records

Alias

Record

A

STDNT_CAR_TERM - Student Career Term Table

Hierarchy Join

Check All

Uncheck All

Fields

Find | View 100

First 1-50 of 124

Last

☒

EMPLID - Empl ID

Join PEOPLE_SRCH - People Search View

Join STDNT_CAR_TERM - Student Career

Join INSTITUTION_TBL - Institution Table

Join TERM_TBL - Term Definition Table

☐

ACAD_CAREER - Academic Career

☒

INSTITUTION - Academic Institution

☒

STRM - Term

Click on the name of the Record you would like to join and a pop up window will appear with the option to select either Standard or Left Outer Join. Make the selection and click "OK".



Select join type

Join Type

☒ Join to filter and get additional fields (Standard Join)

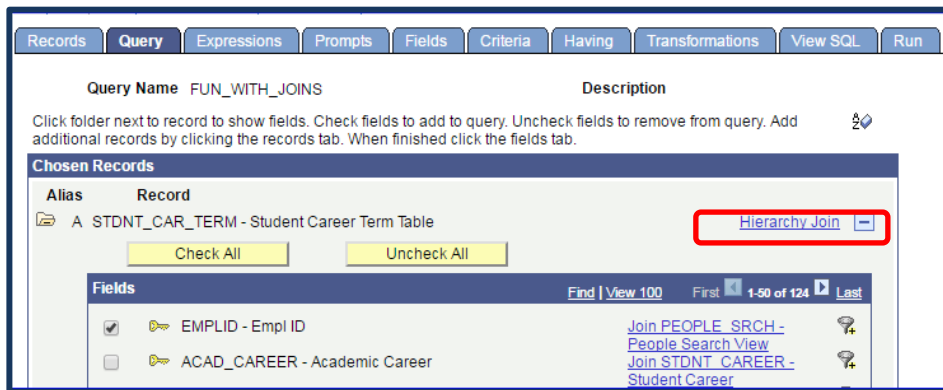
☐ Join to get additional fields only (Left outer join)

Cancel OK

Select the Fields to add to the Query from the new Record.

HIERARCHY JOIN

Once a Record has been added to the Query you are able to see if there are any Hierarchy Joins by navigating to the Query tab. In the upper right corner of the *Chosen Records* box you will see a hyperlink for "Hierarchy Join". Click on the link to see the Hierarchy.



Records Query Expressions Prompts Fields Criteria Having Transformations View SQL Run

Query Name: FUN_WITH_JOINS Description

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.

Chosen Records

Alias	Record
A	STDNT_CAR_TERM - Student Career Term Table


Check All Uncheck All

Fields Find | View 100 First 1-50 of 124 Last

Field	Join
<input checked="" type="checkbox"/> EMPLID - Empl ID	Join PEOPLE_SRCH - People Search View
<input type="checkbox"/> ACAD_CAREER - Academic Career	Join STDNT_CAREER - Student Career

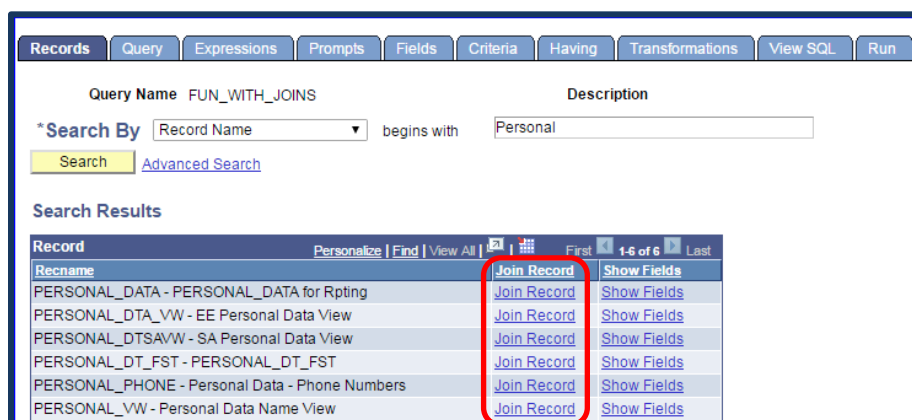
[Hierarchy Join](#)

Select the Record from the Hierarchy list to join.

 Note that there is not an option to choose which type of join you are performing. All Hierarchy Joins are Standard Joins. Select the Fields to add to the Query from the new Record.

ANY JOIN

To complete an Any Join, once you have added the first Record to the Query simply return to the Records tab where you can search for a different Record to add. The list of results will now say "Join Record" instead of "Add Record".



Records Query Expressions Prompts Fields Criteria Having Transformations View SQL Run

Query Name: FUN_WITH_JOINS Description

* Search By Record Name begins with Personal

Search Advanced Search

Search Results

Record	Join Record	Show Fields
PERSONAL_DATA - PERSONAL_DATA for Rptng	Join Record	Show Fields
PERSONAL_DATA_VW - EE Personal Data View	Join Record	Show Fields
PERSONAL_DTSA/VW - SA Personal Data View	Join Record	Show Fields
PERSONAL_DT_FST - PERSONAL_DT_FST	Join Record	Show Fields
PERSONAL_PHONE - Personal Data - Phone Numbers	Join Record	Show Fields
PERSONAL_VW - Personal Data Name View	Join Record	Show Fields

Click on the Record you want to join. A pop up window will appear with the option to select either Standard or Outer Join. In addition there is another pop up window where you need to click the correct hyperlink to tell the system which Record you are joining the second Record to.

In the example below we are joining PERSONAL_PHONE (Record B) to the first Record STNDT_CAR_TERM (Record A). Select the join type and click on they hyperlinked name of the first Record to complete the join.

Select join type and then record to join with PERSONAL_PHONE - Personal Data - Phone Numbers.

Join Type

- ☒ Join to filter and get additional fields (Standard Join)
- ☐ Join to get additional fields only (Left outer join)

Join Record

Personalize | Find | [Grid Icon] | First 1 of 1 Last

A = STNDT_CAR_TERM - Student Career Term Table

Cancel

Another pop up window will appear asking you to confirm the Auto Join Criteria. Click on "Add Criteria".


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.

<input checked="" type="checkbox"/>	A.EMPLID - Empl ID = B.EMPLID - Empl ID
-------------------------------------	---

Add Criteria
Cancel

Select the Fields to add to the Query from the new Record (Record B).

 **Note:** Any Join will allow users to create a Cartesian Join. If a pop up window appears stating that no join conditions were found then the two records do not share any common Key Fields and should usually not be joined. Cartesian joins using Criteria from common Fields is a more advanced topic and will be covered in other classes. Please see the [Cartesian Join](#) section of this document for more information.


Using Criteria in PS Query

Criteria allows user to determine filters for their data. For example, instead of returning results for all Institutions, users can specify a specific Institution. For the scope of this guide we are looking at simple Criteria and how to use them though Criteria can be quite complex.

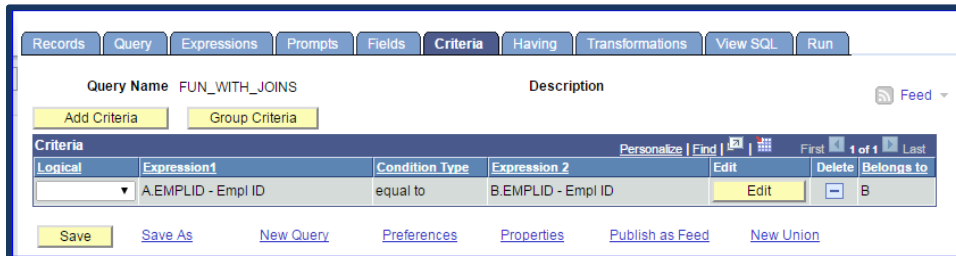
Joins actually create Criteria by stating that the two Record selected must share common information. A typical join Criteria would be that A.EMPLID = B.EMPLID. Meaning that the employee ID from Table A must equal the employee ID from Table B. Other criteria could be specific Institutions, Terms, Instructors, Students, etc.

Criteria					
Personalize Find [Grid Icon] First 1 of 1 Last					
Logical	Expression1	Condition Type	Expression 2	Edit	Delete
▼	A.EMPLID - Empl ID	equal to	B.EMPLID - Empl ID	Edit	-
					B

Adding Criteria

There are two ways to add criteria to a Query. Either navigate directly to the Criteria tab or use the “Add Criteria” icon  in either the Fields Tab or the Query Tab.

THE CRITERIA TAB

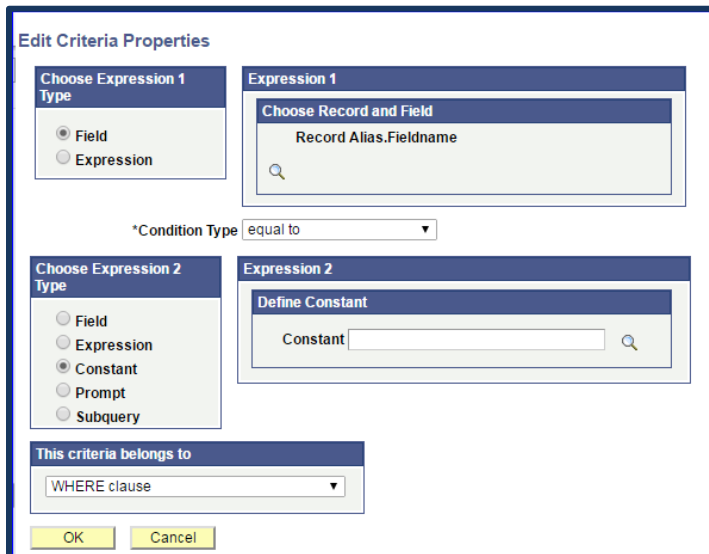


The screenshot shows the 'Criteria' tab selected in a software interface. At the top, there are tabs for Records, Query, Expressions, Prompts, Fields, Criteria (selected), Having, Transformations, View SQL, and Run. Below the tabs, the 'Query Name' is 'FUN_WITH_JOINS' and the 'Description' is empty. There are buttons for 'Add Criteria' and 'Group Criteria'. A table lists the criteria:

Logical	Expression1	Condition Type	Expression 2	Edit	Delete	Belongs to
	A.EMPLID - Empl ID	equal to	B.EMPLID - Empl ID	Edit		B

At the bottom, there are buttons for Save, Save As, New Query, Preferences, Properties, Publish as Feed, and New Union.

Click on “Add Criteria”



The 'Edit Criteria Properties' dialog box is shown. It has two main sections for 'Expression 1' and 'Expression 2'. For 'Expression 1', the 'Type' is 'Field' (selected), and the 'Choose Record and Field' section shows 'Record Alias.Fieldname'. For 'Expression 2', the 'Type' is 'Constant' (selected), and the 'Define Constant' section shows 'Constant' with a text input field. The '*Condition Type' is set to 'equal to'. The 'This criteria belongs to' section is set to 'WHERE clause'. There are 'OK' and 'Cancel' buttons at the bottom.

Here we see the options available for creating Criteria.

- *Expression 1*
- *Condition Type (Operators)*
- *Expression 2 Type*
- *Expression 2*
- *Criteria Belongs to*

- 📁 *Expression 1* is WHAT you want to filter on; Institution, Term, State, etc.
- 📁 *Condition Type* is the Operator – HOW you want to filter; equal to, less than, greater than, etc.
- 📁 *Expression 2* is the VALUE for the criteria; Institution WAI7I, Term 2163, WA, etc.
- 📁 *Criteria Belongs To* is for the SQL coding created and tells the system where to enter the code within the SQL statement.

Expression 1 Expression 1 can be either a *Field* or an *Expression*. Here we will choose *Field*.

Choose Expression 1 Type

☒ Field


☐ Expression

To select WHICH field will be used for *Expression 1* click on the "Magnifying Glass" icon in the *Choose Record and Field* box.

Expression 1

Choose Record and Field


Record Alias.Fieldname




If there is more than one Record being used in the Query, the user will have the option to "Show Fields" from Record A or from Record B.

Click on the hyperlink of the Field to use.

Select a field

Select a record to show fields for Personalize | Find |  First 1-2 of 2 Last

Alias	Record	Record Description	Show Fields
A	STDNT_CAR_TERM	Student Career Term Table	Show Fields
B	PERSONAL_DTSVW	SA Personal Data View	Show Fields

Select a field Personalize | Find | View 100 |  First 1-50 of 124 Last

[A.EMPLID - Empl ID](#)

[A.ACAD CAREER - Academic Career](#)

[A.INSTITUTION - Academic Institution](#)

[A.STRM - Term](#)

The selected Field will appear in the *Choose Record and Field* box.

Expression 1

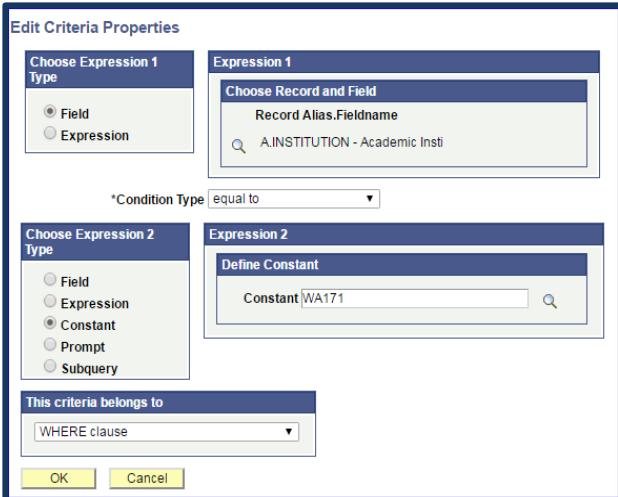
Choose Record and Field

Record Alias.Fieldname

 A.INSTITUTION - Academic Insti

Condition Type The *Condition Type* determines how Query Manager compares the *Expression 1* to *Expression 2*. Select the preferred *Condition Type*. For the example in this Guide the *Condition Type* is *Equal To*.

*Condition Type equal to



Edit Criteria Properties

Choose Expression 1 Type

☒ Field
☐ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname
A.INSTITUTION - Academic Insti

***Condition Type** equal to

Choose Expression 2 Type

☐ Field
☐ Expression
☒ Constant
☐ Prompt
☐ Subquery

Expression 2

Define Constant

Constant WA171

This criteria belongs to

WHERE clause

OK Cancel

Between The value in the selected record field falls between two comparison values. The range is inclusive.

Equal to The value in the selected record field exactly matches the comparison value.

Exists This operator is different from the others, in that it does not 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.

Greater Than The value in the record field is greater than the comparison value.

In List The value in the selected record field matches one of the comparison values in a list.

In Tree 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.

Note: PeopleSoft Query should not use trees that contain a combination of dynamic details and range details. The results returned from trees with this combination of details may be inaccurate. See PeopleSoft Tree Manager Overview.

Is Null 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.

Less Than The value in the record field is less than the comparison value.

Like 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 _.

% matches any string of zero or more characters. For example, C% matches any string starting with C, including C alone.

_ matches any single character. For example, _ones matches any five-character string ending with ones, such as Jones or Cones.

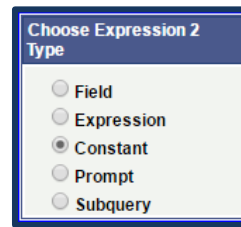
PeopleSoft Query also recognizes any wild-card characters that your database software supports. See your documentation for your database management system for details.

To use one of the wild-card characters as a literal character (for example, to include a % in your string), precede the character with a \ (for example, percent\%).

Expression 2

Expression 2 can be a:

- *Field*
- *Expression*
- *Constant*
- *Prompt*
- *Subquery*



Choose Expression 2 Type

☐ Field
☐ Expression
☒ Constant
☐ Prompt
☐ Subquery

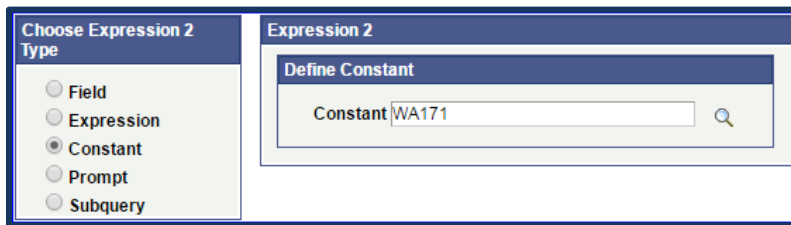
For the purpose of this Guide we will discuss *Field*, *Constant* and *Prompts*.

Using *Expression 2* as a *Field* is how Joins are able to relate two or more Records. For example, the criteria $A.EMPLID = B.EMPLID$ is expressing as Criteria that the Field *Employee ID* from Record A must be the same as the Field *Employee ID* in Record B.

Using *Expression 2* as a *Constant* allows the user to enter a specific value, for example, a specific Institution. This means the Query will be developed for this Institution only.

Using *Expression 2* as a *Prompt* allows the user to select the value from a list, for example, a list of Institutions. This allows multiple users to use the same Query as they are each able to select different Institutions. Please see the [Using Prompts to Extend the Life of a Query](#) section of this document for more information.

Select *Expression 2* as a *Constant* and enter in WA171 in the *Constant* Field.



Choose Expression 2 Type

☐ Field
☐ Expression
☒ Constant
☐ Prompt
☐ Subquery

Expression 2

Define Constant

Constant WA171

This Criteria Belong To The default for *This Criteria Belongs To* will be to add the Criteria to the WHERE clause of the SQL Statement. Unless linking two Records in an Outer Join, you should leave the default of the WHERE clause.

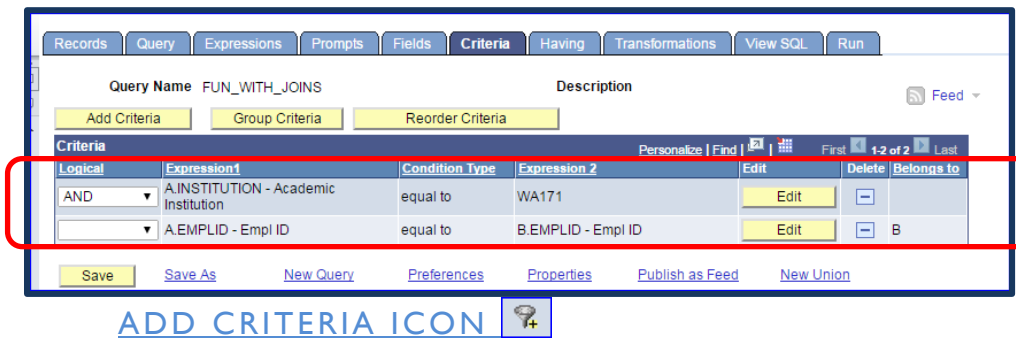


This criteria belongs to

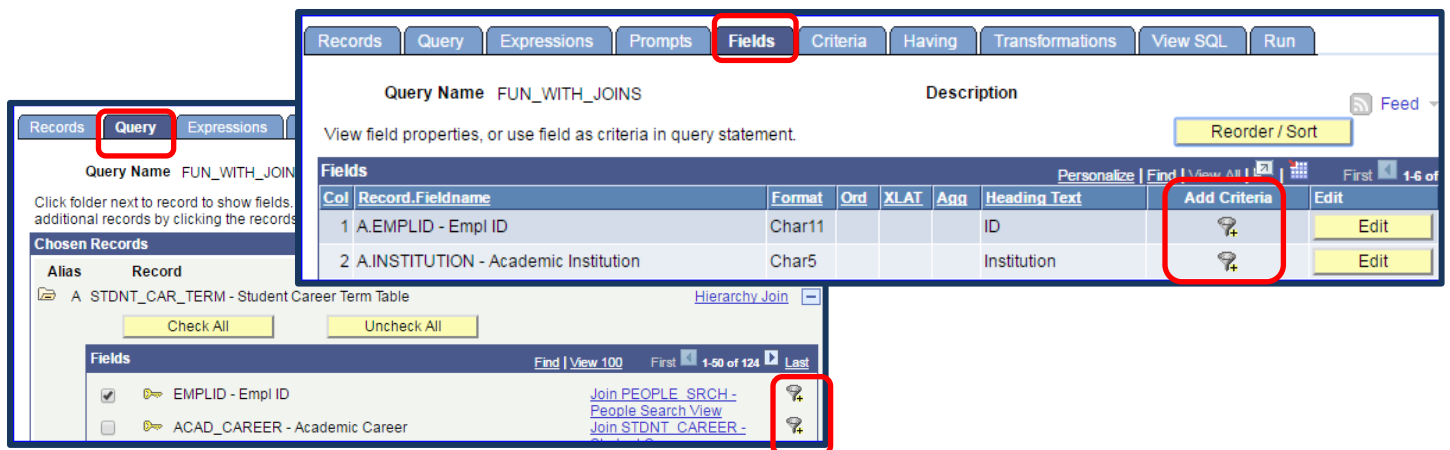
WHERE clause

Click "OK".

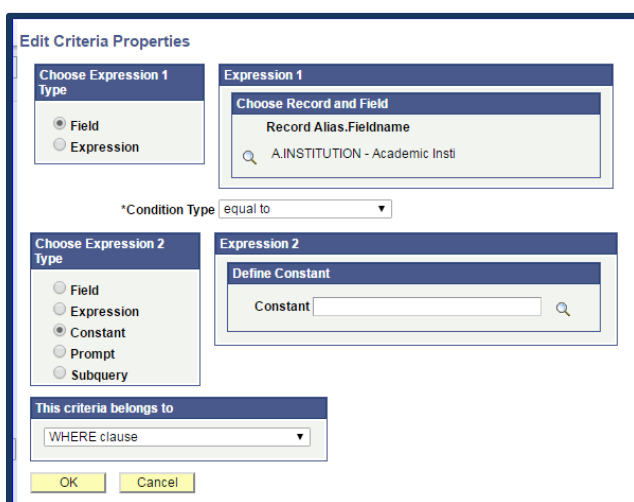
The new Criteria have now been added to the Query and only results for Institution WA171 will display when the Query is ran.



To use the “Add Criteria” icon navigate to the Fields tab or the Query tab. The icon appears to the right of the Field name in the Query tab and in the column *Add Criteria* in the Fields tab.



Click on the “Add Criteria” icon next to the Field you want to use for the Criteria selection. The first thing you will notice is that you do not need to choose the *Expression 1* Field as it will already be automatically filled in by the system using the Field you just selected for the Criteria selection.




From this point on, the way to set up Criteria follows exactly the same steps as the Criteria Tab instructions. Users will select the *Condition Type* and *Expression 2* as explained in the [Criteria Tab](#) section of this document.

Using Prompts to Extend the Life of a Query

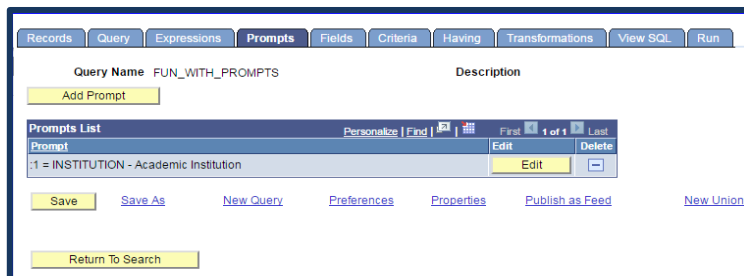
Run Time Prompts or Prompts are the most useful functionality to extend the life of your Query and to increase its value. In the section on Criteria we learned how to select a specific value to filter our Query output. In this section we will learn how to do the same thing, with the caveat, that users will be able to select a different value each time the Query is ran. What this means is that a single Query can be developed that would be valuable for all colleges or business units. Each college would simply run the Query, inputting the code for their own Institution in the Prompt.

Creating Prompts through the Prompts Tab

Again, there are two ways to add Prompts to a Query. Either navigate directly to the Prompts tab or, as Prompts really are a just a specialized type of Criteria, use the “Add Criteria” icon  in either the Fields Tab or the Query Tab.

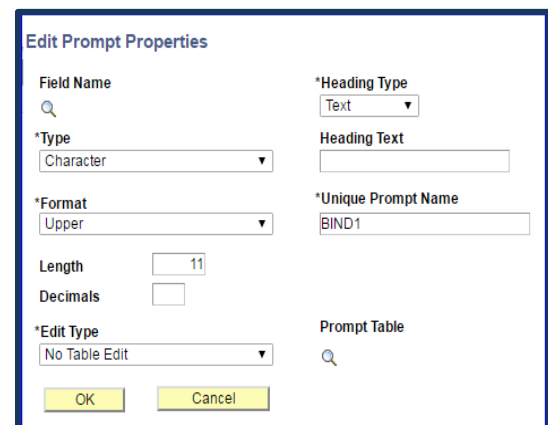
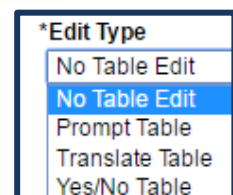
THE PROMPTS TAB

From the Prompts tab click on the “Add Prompt” button.



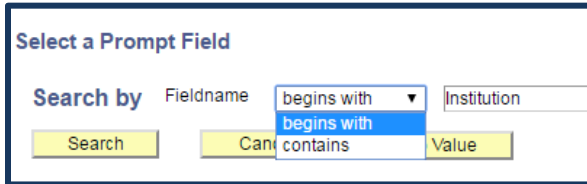
The *Edit Prompt Properties* page will appear. On this page you are able to add/modify the:

- **Field Name** – select the field to use for the Prompt
- **Heading Type** – select the Long or Short Version of the Field Name or input Text.
- **Format** – choose the format for the prompt table, the system selects the default format for the field selected.
- **Unique Prompt Name** – filled in automatically by the system and shouldn't be changed.
- **Length** – determine the Prompt field's length
- **Decimals** – select how many decimals are allowed for numeric prompts
- **Edit Type** – define the prompt type of field edit
 - No Table Edit - Displays a list of values for the user to select. If user enters some other value which is not present in the list then the new value is accepted by the system.
 - Prompt Table - Displays the list of values for the user to select. User has to select only those values. If some other value is entered the system gives an error saying, "Invalid Value".
 - Translate Table – Provides a dropdown that users can select from. The length of the field should not exceed 4 char.
 - Yes/No Table - This will produce a *Prompt* checkbox. By Default it will be checked (Y).
- **Prompt Table** – provide users with a lists of validated values pulled from a different Record.

Select the *Field Name* to use for the Prompt by clicking on the "Magnifying Glass" icon  next to *Field Name*.

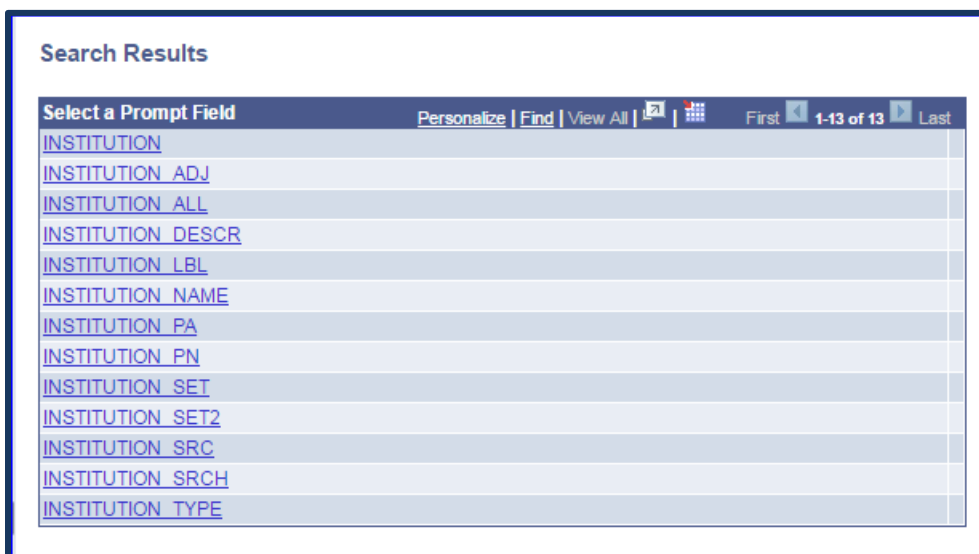
Select an *Operator* of either *Begins With* or *Contains* and search for the correct *Field Name*.





Select a Prompt Field

Search by Fieldname


A list of hyperlinked results will appear. Click on the correct *Field Name*.

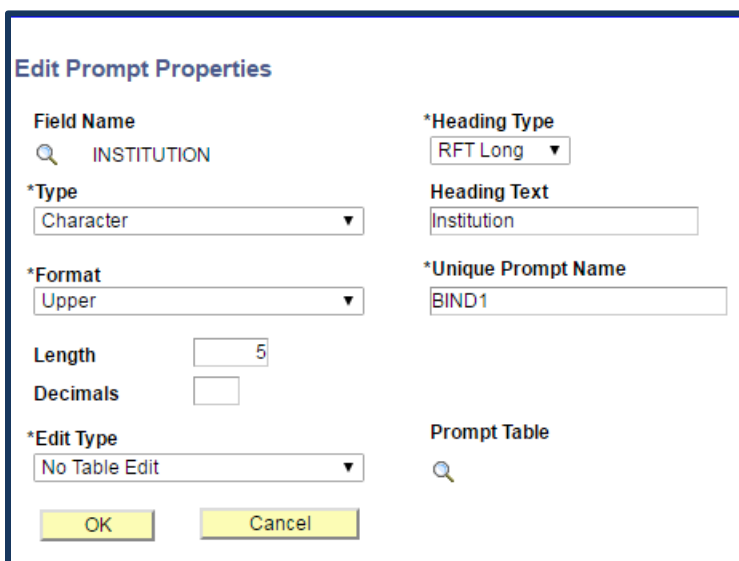


Search Results


Select a Prompt Field Personalize | Find | View All |   First 1-13 of 13 Last

INSTITUTION
INSTITUTION_ADJ
INSTITUTION_ALL
INSTITUTION_DESCR
INSTITUTION_LBL
INSTITUTION_NAME
INSTITUTION_PA
INSTITUTION_PN
INSTITUTION_SET
INSTITUTION_SET2
INSTITUTION_SRC
INSTITUTION_SRCH
INSTITUTION_TYPE

 Note: For the Prompt to work the Field selected **MUST** be a Field from one of the Records used in your Query, however the Field does **NOT** have to be displayed in your results. Next make any desired changes to the Heading or other options.



Edit Prompt Properties

Field Name  INSTITUTION

*Heading Type

*Type

Heading Text


*Format

*Unique Prompt Name

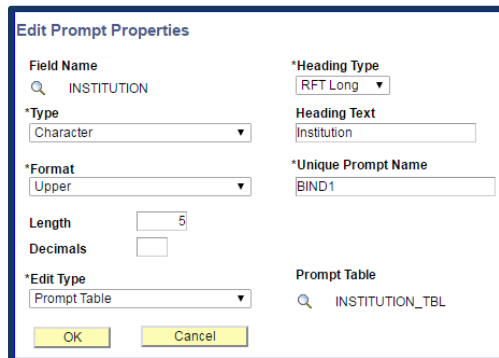
Length

Decimals

*Edit Type

Prompt Table 

Now select the *Edit Type* via the dropdown menu then find the correct *Prompt Table* by searching via the "Magnifying Glass" icon. In this example, *Prompt Table* was selected for the *Edit Type* and the *INSTITUTION_TBL* was selected as the *Prompt Table*.



Edit Prompt Properties

Field Name: INSTITUTION

*Type: Character

*Format: Upper

Length: 5

Decimals:

*Edit Type: Prompt Table

*Heading Type: RFT Long

Heading Text: Institution

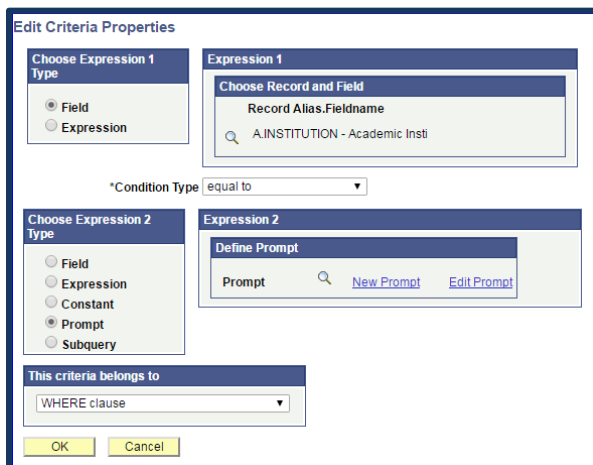
*Unique Prompt Name: BIND1

Prompt Table: INSTITUTION_TBL

OK Cancel

ADDING PROMPTS AS CRITERIA FOR THE QUERY

Now that you have created a Prompt you will need to associate the Prompt to the Query. To do this we will add the Prompt as Criteria for the Query. Go to the Criteria tab and click "Add Criteria". Select the *Field* to be used as the Criteria and then select the *Operator* to use. Select *Prompt* as the "Expression 2 Type" and then click on the "Magnifying Glass" icon in the *Expression 2 Define Prompt* box to search for the Prompt you just created.



Edit Criteria Properties

Choose Expression 1 Type: Field

Expression 1: Choose Record and Field
Record Alias.FieldName: A.INSTITUTION - Academic Insti

*Condition Type: equal to

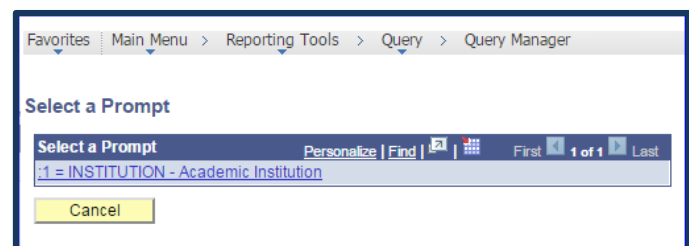
Choose Expression 2 Type: Prompt

Expression 2: Define Prompt
Prompt: New Prompt Edit Prompt

This criteria belongs to: WHERE clause

OK Cancel

As there is already a Prompt created you can select it from here by simply clicking on the hyperlinked result.



Favorites | Main Menu > Reporting Tools > Query > Query Manager

Select a Prompt

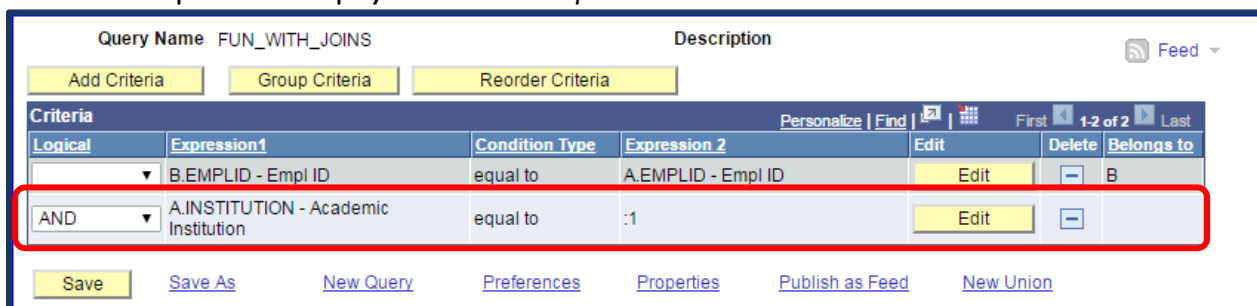
Select a Prompt Personalize Find First 1 of 1 Last

:1 = INSTITUTION - Academic Institution

Cancel

Click OK.

Review the Criteria tab to see that the Prompt is now being used as part of the Criteria for the Query. Note the Prompt displays as a colon and the Prompt number (:1). Prompts increase incrementally. A second Prompt would display as :2 in the *Expression 2* column.



Query Name: FUN_WITH_JOINS Description: Feed

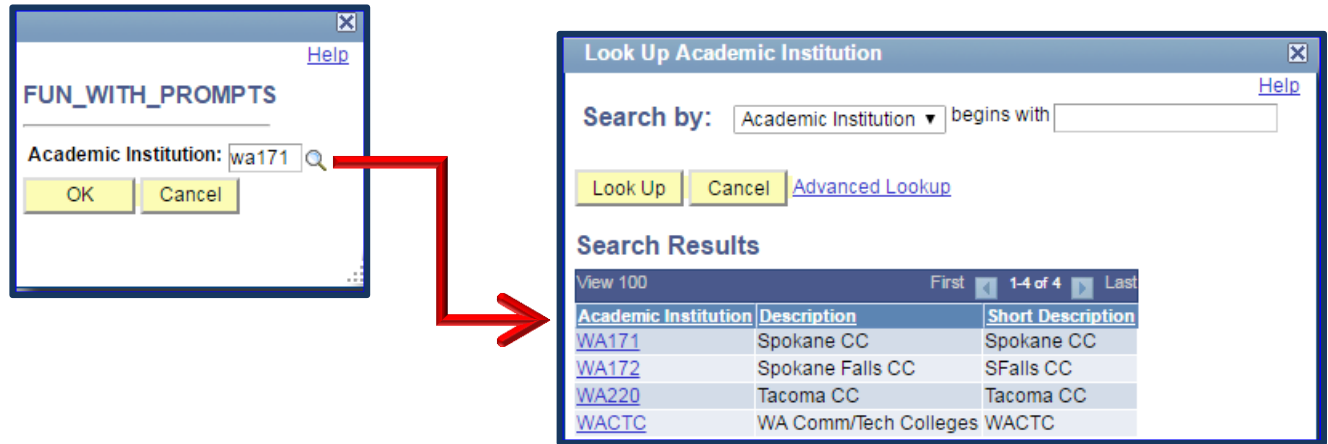
Add Criteria Group Criteria Reorder Criteria

Logical	Expression1	Condition Type	Expression 2	Edit	Delete	Belongs to
	B.EMPLID - Empl ID	equal to	A.EMPLID - Empl ID	Edit	-	B
AND	A.INSTITUTION - Academic Institution	equal to	:1	Edit	-	

Save Save As New Query Preferences Properties Publish as Feed New Union

Run the Query.

A pop up window will appear listing the Query Name and the Prompt Field. Either enter the information in the Field or click on the "Magnifying Glass" icon to see a list of options.



The Query will run based on the information specified in the Prompt.

Records	Query	Expressions	Prompts	Fields	Criteria	Having	Transformations	View SQL	Run
---------	-------	-------------	---------	--------	----------	--------	-----------------	----------	-----

Academic Institution = WA171

[View All](#) | [Rerun Query](#) | [Download to Excel](#) | [Download to XML](#)

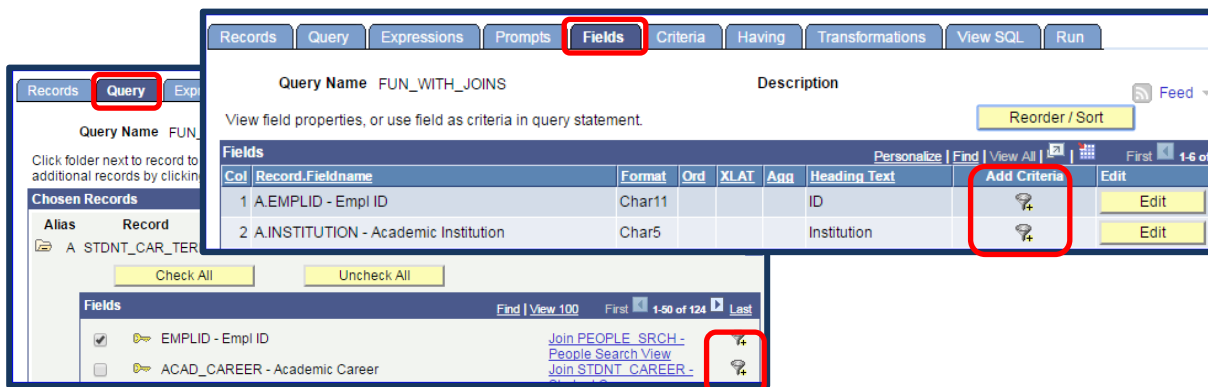
First 1-100 of 32001 Last

	ID	Institution	Term	Acad Load	Proj Level	Name
1	201053597	WA171	2057	N	10	
2	201053597	WA171	2051	N	10	
3	201053597	WA171	2047	N	10	
4	101000539	WA171	2155	N	10	
5	201053597	WA171	2041	N	10	
6	201053597	WA171	2037	N	10	

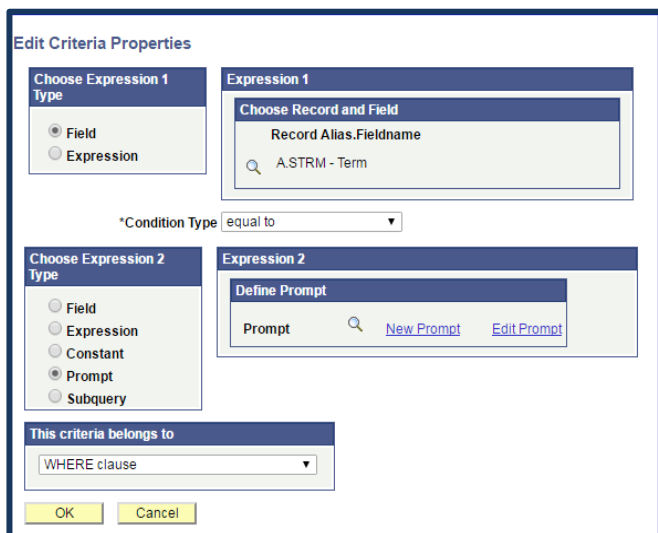
Creating Prompts Through the “Add Criteria” icon

Creating Prompts through the “Add Criteria” icon in the Fields Tab or the Query Tab allows the system to do some of the work for you, simplifying the process just a bit. The Prompt will automatically be set up as Criteria for the Query and the Prompt Table may automatically populate.

To use the “Add Criteria” icon, navigate to the Fields tab or the Query tab. The icon appears to the right of the field name in the Query tab and in the column *Add Criteria* in the Fields tab.

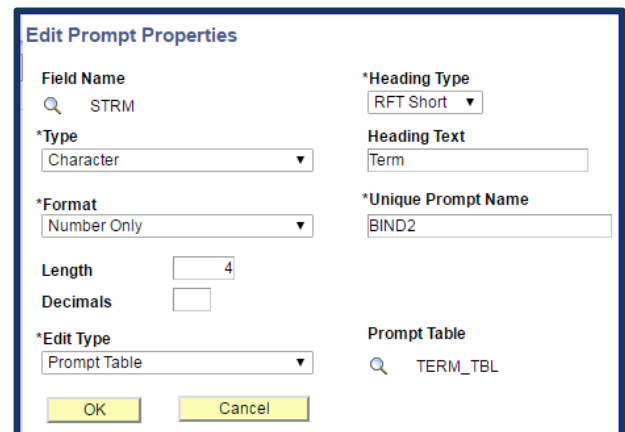


Click on the “Add Criteria” icon next to the Field you want to use for the Prompt selection. *Expression 1* will already be automatically filled in by the system using the Field you just selected. Select *Prompt* as the *Expression 2 Type* and choose the *Condition Type*.



Note that the *Field Name* and *Prompt Table* have been automatically populated and all that is left to do is update the Prompt Heading, if desired.

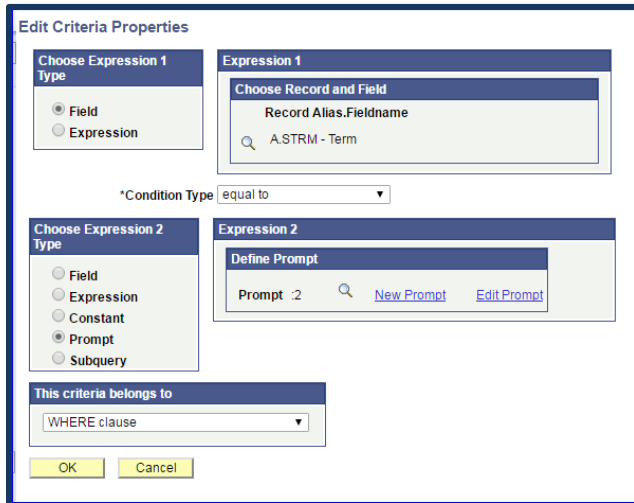
Now you are able to either use a Prompt already created by searching using the magnifying glass or create a new Prompt. Click on “New Prompt”.



It is very important to note that the selection for the *Prompt Table* made by the system is NOT always accurate. In this example the *TERM_TBL* was selected automatically by the system however the correct Prompt Table to use for the Prompt to work is *TERM_VAL_TBL*. If the prompt does not work correctly check this guide in the [Prompt Tables to Use](#) section.

Make any changes and click "OK".

This will take you back out to the *Edit Criteria Properties* page. Click "OK" again then run the Query.



Edit Criteria Properties

Choose Expression 1 Type
☒ Field
☐ Expression

Expression 1
 Choose Record and Field
 Record Alias.Fieldname
 A.STRM - Term

*Condition Type equal to

Choose Expression 2 Type
☐ Field
☐ Expression
☐ Constant
☒ Prompt
☐ Subquery

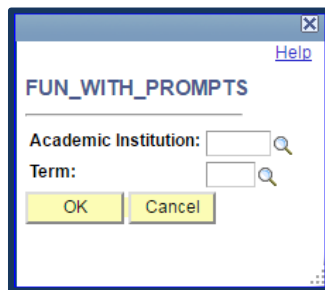
Expression 2
 Define Prompt
 Prompt :2 [New Prompt](#) [Edit Prompt](#)

This criteria belongs to
 WHERE clause

OK Cancel

A pop up window will appear with the first Prompt of *Academic Institution* and the second Prompt value and longevity as which Term to display.

Users are able to start typing in the value for the Prompt and the system will provide a list based on the value typed in as shown below.



FUN_WITH_PROMPTS

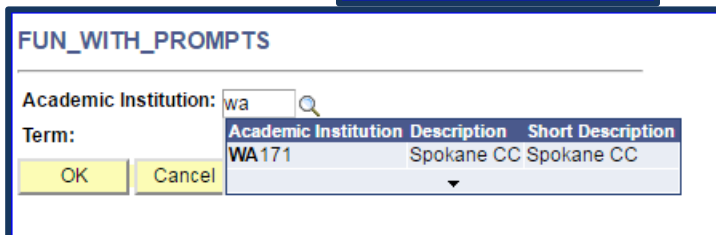
Academic Institution: [Help](#)

Term:

OK Cancel

appear with the first Prompt of *Academic Institution* of Term. This Query has now been increased in users are able to select which Institution and

typing in the value for the Prompt and the system on the value typed in as shown below.



FUN_WITH_PROMPTS

Academic Institution: [Help](#)

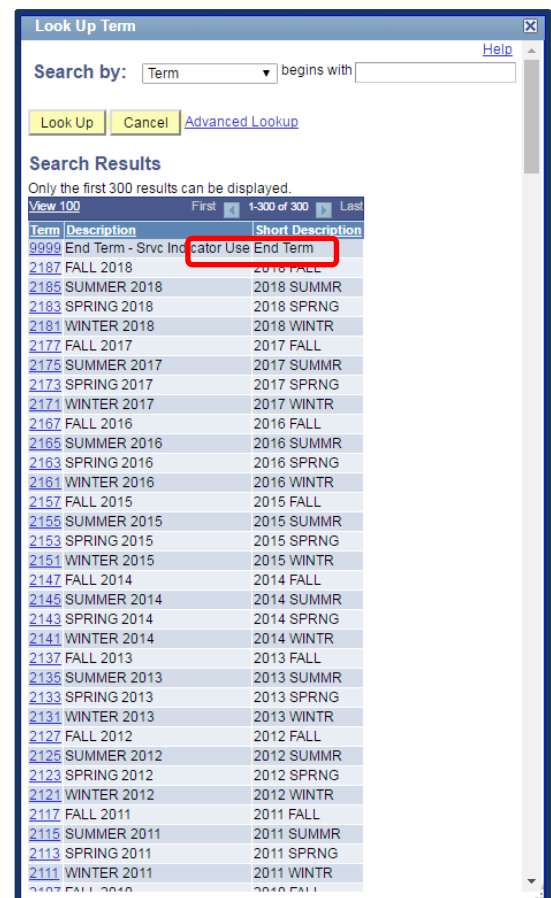
Term:

OK Cancel

Academic Institution	Description	Short Description
WA 171	Spokane CC	Spokane CC

Or users are also able to pull up the complete list of values to select from as shown in the example to the right.

Note the maximum amount of values to select from is 300.



Look Up Term

Search by: Term begins with

[Look Up](#) [Cancel](#) [Advanced Lookup](#)

Search Results

Only the first 300 results can be displayed.

View 100 First 1-300 of 300 Last


Term	Description	Short Description
9999	End Term - Svc Indicator Use End Term	
2187	FALL 2018	2018 FALL
2185	SUMMER 2018	2018 SUMMR
2183	SPRING 2018	2018 SPRNG
2181	WINTER 2018	2018 WINTR
2177	FALL 2017	2017 FALL
2175	SUMMER 2017	2017 SUMMR
2173	SPRING 2017	2017 SPRNG
2171	WINTER 2017	2017 WINTR
2167	FALL 2016	2016 FALL
2165	SUMMER 2016	2016 SUMMR
2163	SPRING 2016	2016 SPRNG
2161	WINTER 2016	2016 WINTR
2157	FALL 2015	2015 FALL
2155	SUMMER 2015	2015 SUMMR
2153	SPRING 2015	2015 SPRNG
2151	WINTER 2015	2015 WINTR
2147	FALL 2014	2014 FALL
2145	SUMMER 2014	2014 SUMMR
2143	SPRING 2014	2014 SPRNG
2141	WINTER 2014	2014 WINTR
2137	FALL 2013	2013 FALL
2135	SUMMER 2013	2013 SUMMR
2133	SPRING 2013	2013 SPRNG
2131	WINTER 2013	2013 WINTR
2127	FALL 2012	2012 FALL
2125	SUMMER 2012	2012 SUMMR
2123	SPRING 2012	2012 SPRNG
2121	WINTER 2012	2012 WINTR
2117	FALL 2011	2011 FALL
2115	SUMMER 2011	2011 SUMMR
2113	SPRING 2011	2011 SPRNG
2111	WINTER 2011	2011 WINTR

Section 3

PeopleSoft Query Tips and Tricks

This section will provide Query Developers with various tips, tricks and shortcuts. Please note that some of the material in this section is a bit more advanced. Each section provides step by step instructions so that all level of users will be able to perform the task.

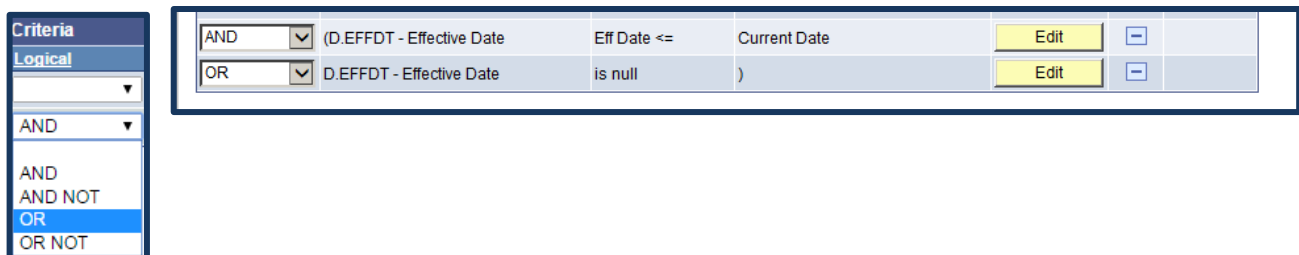
Helpful Prompts

- ✉ In general it is better to create Prompts from the Field tab or the Query tab by clicking the “Add Criteria”  icon and create the Prompt new than to use the Prompt tab because, as we have seen, the system is helpful in filling out certain selections this way, saving time.
- ✉ It is important to know that Prompts works in cascade, this means that the first Prompt has to work for the second to work and so on.

Working With Multiple Effective Dates

When two Records are joined that both have an EFF_DATE, it is necessary to manipulate the EFF_DATE criteria of the second Record to avoid getting NULL results:

- Create the Query Criteria
 - In Criteria tab, click on “Add Criteria” button.
 - In the Expression I box search EFF DATE by clicking in the “Magnifying Glass” icon and locate the EFF DATE field (if necessary, select to view the Fields from Record B).
 - Select the Condition Type of Is Null.
 - Click “OK”.
- Make Modifications to the Query Criteria
 - Back at the Criteria tab click “Group Criteria” button.
 - Add left and right parenthesis to Group both Criteria.
 - Click “OK”.
 - Change the Expression to Or in the Logical column and click "Save".

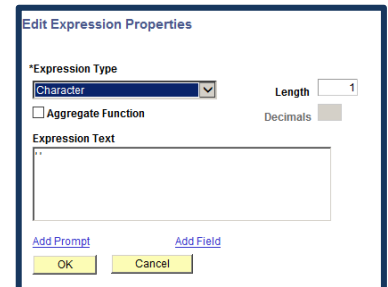


Criteria	Logical	Expression I	Condition Type	Expression II	Buttons
AND		(D.EFFDT - Effective Date	Eff Date <=	Current Date	Edit -
OR		D.EFFDT - Effective Date	is null)	Edit -

Optional Prompt with Data Validation

To create a prompt that can be left blank or selected from a list of validated values:

- Create your Prompt as usual (preferably from the Field tab)
- Create a new Expression in the Expression tab.
 - In *Expression Text* enter: '' (apostrophe-space-apostrophe). It should look like the example to the right.
 - Click "OK".
- Add your Expression as an Optional Prompt to the Query Criteria
 - Navigate to the Criteria tab click the "Add Criteria" button.
 - Select *Expression* in *Expression 1 Type*.
 - Click on the "Magnifying Glass" icon to search for the desired Expression in *Expression 1* – and click to select.
 - Select *Prompt* in *Choose Expression 2 Type*.
 - Click on the "Magnifying Glass" icon to search for the desired Prompt in *Expression 2 – Define Prompt*, select the same Prompt created at the beginning of the exercise (:1).



Edit Expression Properties

*Expression Type: **Character** Length: **1**

☐ Aggregate Function Decimals: **0**

Expression Text: **''**

[Add Prompt](#) [Add Field](#)

OK **Cancel**



Select an expression

Select an expression Personalize Find First 1 of 1 Last

Cancel

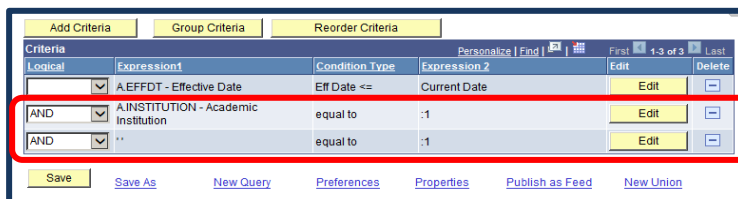


Select a Prompt

Select a Prompt Personalize Find First 1 of 1 Last

Cancel

- The Criteria tab should now appear similar to the example below:

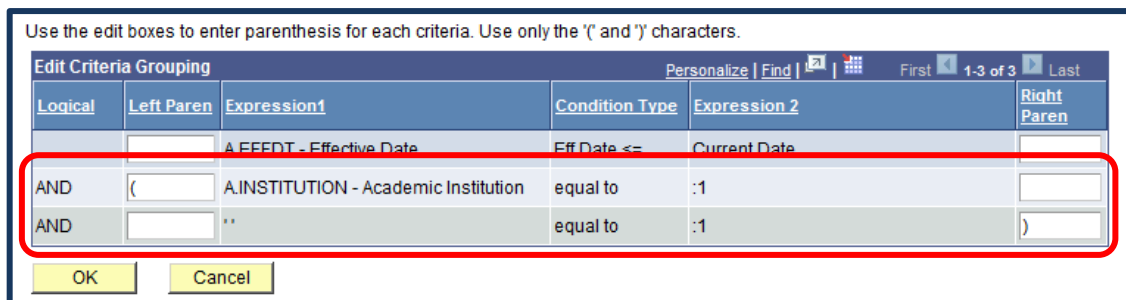


Criteria tab showing criteria for Expression 1 and Expression 2. The criteria are grouped with AND logic.

Logical	Expression 1	Condition Type	Expression 2	Edit	Delete
	A.EFFDT - Effective Date	Eff Date <=	Current Date	Edit	
AND	A.INSTITUTION - Academic Institution	equal to	:1	Edit	
AND	''	equal to	:1	Edit	

Save **Save As** **New Query** **Preferences** **Properties** **Publish as Feed** **New Union**

- Make the final Criteria modifications
 - Back at the "Criteria" tab click "Group Criteria" button.



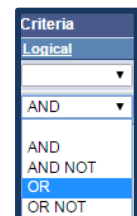
Use the edit boxes to enter parenthesis for each criteria. Use only the '(' and ')' characters.

Edit Criteria Grouping

Logical	Left Paren	Expression 1	Condition Type	Expression 2	Right Paren
		A.EFFDT - Effective Date	Eff Date <=	Current Date	
AND	(A.INSTITUTION - Academic Institution	equal to	:1	
AND		''	equal to	:1)

OK **Cancel**

- Add left and right parenthesis to group both criteria:
- Click "OK".
- Change the Expression to *Or* in the Logical column and click "Save".



Criteria

Logical

AND

AND


AND NOT

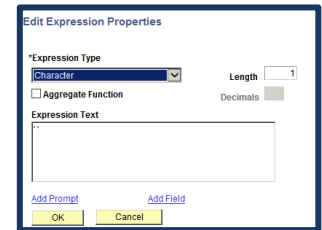
OR

OR NOT

Optional Prompt with No Data Validation

To create a Query where the Prompt can be left blank or typed in with no data validation (list of values):

- Create a new Expression in the Expression tab.
 - In *Expression Text* enter: ‘ ‘ (apostrophe-space-apostrophe). It should look like the example to the right.
 - Click “OK”.
- Add your Expression as an Optional Prompt to the Query Criteria
 - Go to the *Criteria* tab click the “Add Criteria” button.
 - Select *Expression* in *Expression / Type*.
 - Click on the "Magnifying Glass" icon to search for the desired Expression in *Expression /* – and click to select.
 - Select *Prompt* in *Choose Expression 2 Type*.
 - Select “New Prompt” in *Expression 2 – Define Prompt*.
 - Leave the *Field Name* blank.
 - Select *Text* from the *Heading Text* drop down list.
 - Type the Prompt Name in the *Heading Text* Field.
 - The *Edit Type* Field should be *No Table Edit*.
 - Click on the “Magnifying Glass” icon to select a Prompt table. Click on “No Value”.
- Match the Selected Field to the Optional Prompt
 - Go to the *Fields* tab and click on the “Add Criteria”  icon. next to the Field to be used for the Prompt.
 - As this was done from the *Fields* tab *Choose Expression 1* and *Expression 1 – Choose Record and Field* will be already filled in with the information from the selected Field.
 - Select *Prompt* for the *Choose Expression 2 Type*.
 - Click on the "Magnifying Glass" icon to search for the Optional Prompt in *Expression 2 –* and click to select.
 - Click "OK".
- The Criteria tab should now appear similar to the example below:



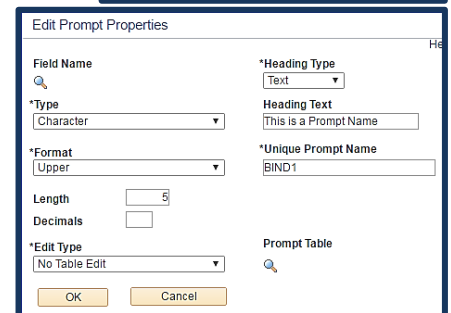
Dialog box titled "Edit Expression Properties". It has tabs for "Expression Type", "Aggregate Function", and "Expression Text". The "Expression Type" dropdown is set to "Character". The "Length" field is set to "1". The "Expression Text" field contains two single quotes: ' '.



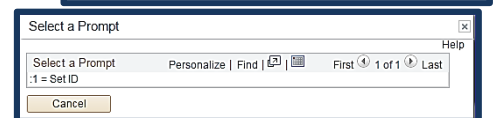
Dialog box titled "Select an expression". It has a search bar and a "Cancel" button.



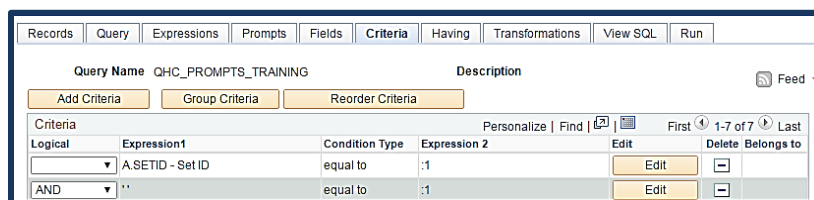
Dialog box titled "Select a Prompt Table". It has a "Search by" dropdown set to "Name", a "begins with" dropdown, and a "Search" button. A "No Value" button is highlighted with a red box.



Dialog box titled "Edit Prompt Properties". It has tabs for "Field Name", "Type", "Format", "Length", "Decimals", "Edit Type", and "Prompt Table". The "Field Name" field is empty. The "Type" dropdown is set to "Character". The "Format" dropdown is set to "Upper". The "Length" field is set to "5". The "Decimals" field is set to "0". The "Edit Type" dropdown is set to "No Table Edit". The "Prompt Table" dropdown is set to "BIND1".



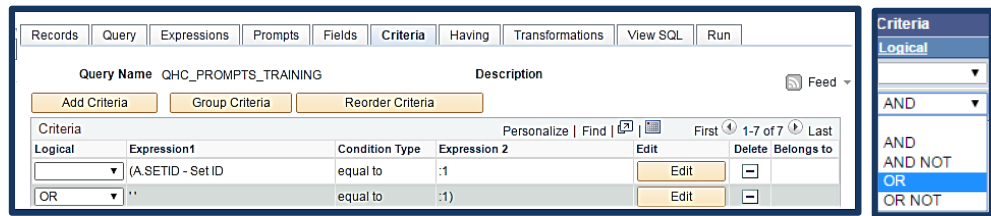
Dialog box titled "Select a Prompt". It has a search bar and a "Cancel" button.



Screenshot of the Query Criteria tab. The "Criteria" tab is selected. The "Query Name" is "QHC_PROMPTS_TRAINING". The "Description" is empty. The "Criteria" table has two columns: "Expression1" and "Expression2". The first row has "A.SETID - Set ID" in "Expression1" and "1" in "Expression2". The "Condition Type" is "equal to". The "Logical" column has "AND".

- Make the final Criteria modifications
 - Click the “Group Criteria” button.
 - Add left and right parenthesis to group both criteria.

- Click “OK”.
- Change the operator in the *Logical* column to *Or* and click “Save”.

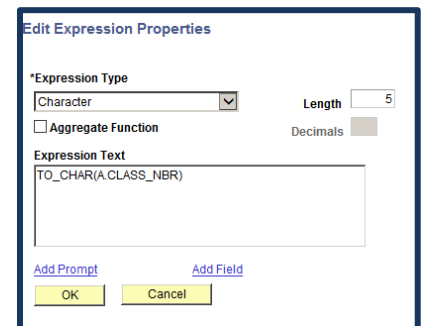


Criteria	Expression1	Condition Type	Expression 2	Edit	Delete	Belongs to
Logical	(A.SETID - SetID)	equal to	:1	Edit	Delete	
OR	**	equal to	:1	Edit	Delete	

Optional Numeric Prompt with No Data Validation

This is a special case since the Field used is numeric and the user wants to have the option to enter a numeric value without having a list to choose from or leave the field blank. This combination doesn't work with a regular “Prompt-Expression” combination. It is necessary to convert the “Numeric” field to a “TO-CHAR” format to make this Prompt work.

- Create a new Expression in the Expression tab.
 - For Expression Type select Character from the drop down list.
 - Match the original numeric length in the Length Field.
 - Enter TO_CHAR(X.FIELD_NAME) where X.FIELD_NAME is the name of the Field.
 - Click “OK” button to save the new Expression.
 - Back on the Expression tab click “Use as Field” link, to add the Expression as a Field. Make sure to test it.



Edit Expression Properties

*Expression Type: Character Length: 5

☐ Aggregate Function Decimals: 0

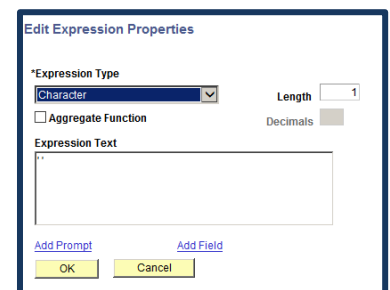
Expression Text: TO_CHAR(A.CLASS_NBR)

Add Prompt Add Field OK Cancel



Expressions List	Use as Field	Add Criteria	Edit	Delete
Expression Text				
TO_CHAR(A.STRM)	Use as Field		Edit	Delete

- Run your Query to test the results.
 - If it runs correctly, re-name the *Expression* Field and remove the original numeric Field.
- Proceed to create a second Expression.
 - On the Expressions tab click “Add Expression”.
 - In Expression Text enter: ‘ ‘ (apostrophe-space-apostrophe). It should look like the example to the right.
 - Click the “OK” button.



Edit Expression Properties

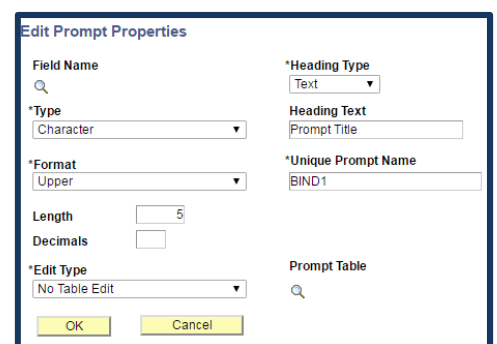
*Expression Type: Character Length: 1

☐ Aggregate Function Decimals: 0

Expression Text: ' '

Add Prompt Add Field OK Cancel

- Create the Optional Prompt
 - Select the Prompts tab and click “Add Prompt” button to create a new Prompt.
 - Leave *Field Name* blank.
 - *Heading Type* stays as *Text*.
 - Name the Prompt in the *Heading Text* Field.
 - Match the original numeric length in the *Length* field.
 - Make sure *Edit Type* is *No Table Edit*.
 - Leave *Prompt Table* blank.
 - Click the “OK” button.



Edit Prompt Properties

Field Name: Prompt Title

*Heading Type: Text

*Type: Character

*Format: Upper

Length: 5 Decimals: 0

*Edit Type: No Table Edit

*Unique Prompt Name: BIND1

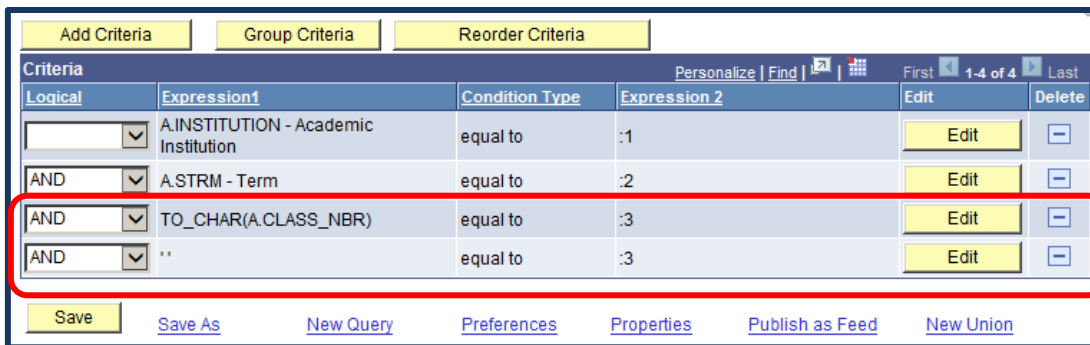
Prompt Table: Prompt Table

OK Cancel

- Match the Selected Field to the Optional Prompt as Query Criteria

- Back at the Fields tab click the “Add Criteria”  icon next to your TO_CHAR Field.

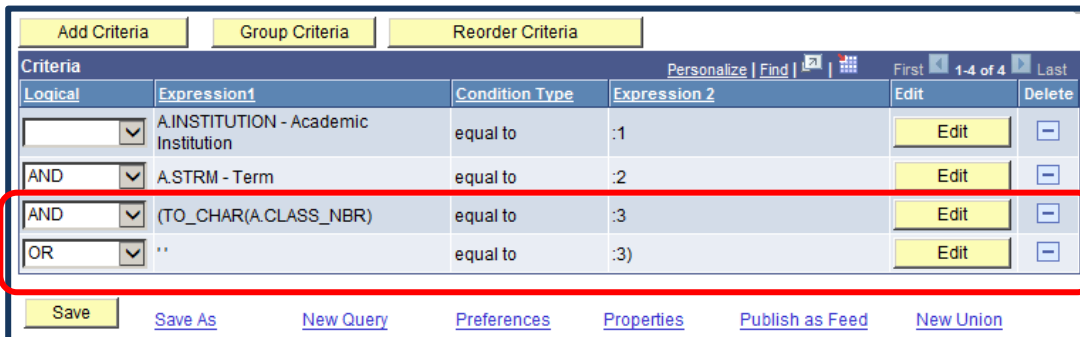
- As this was done from the Fields tab *Choose Expression 1* and *Expression 1 – Choose Record and Field* will be already filled in with the information from the selected Field.
- On *Choose Expression 2 Type* select the Prompt radio button.
- On *Expression 2 – Define Prompt*, click on the “Magnifying Glass” icon and select the Optional Prompt.
- Click the “OK” button
- Match your Expression to the Optional Prompt and Add as Query Criteria
 - On Criteria tab click “Add Criteria”.
 - For *Expression 1 Type* select *Expression* radio button.
 - Click on the “Magnifying Glass” Icon to find and select the “Apostrophe” Expression in *Expression 1 – Define Expression*.
 - On *Choose Expression 2 Type* select the *Prompt* radio button.
 - On the *Expression 2 – Define Prompt* click on the “Magnifying Glass” Icon to search for the Optional Prompt, once found, click on it to select it.
 - Click the “OK” button. It should look like this:



Add Criteria			Group Criteria			Reorder Criteria					
Criteria							Personalize	Find	First	1-4 of 4	Last
Logical	Expression1	Condition Type	Expression 2	Edit	Delete						
	A.INSTITUTION - Academic Institution	equal to	:1	Edit							
AND	A.STRM - Term	equal to	:2	Edit							
AND	TO_CHAR(A.CLASS_NBR)	equal to	:3	Edit							
AND	''	equal to	:3	Edit							

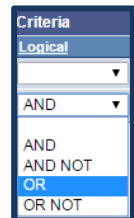
Save Save As New Query Preferences Properties Publish as Feed New Union

- Make the final Criteria modifications
 - Click the “Group Criteria” button.
 - Add left and right parenthesis to group both Criteria.
 - Click the “OK” button.
 - Back on Criteria tab, change the *Logical* column Expression to *Or* and click "Save".



Add Criteria			Group Criteria			Reorder Criteria					
Criteria							Personalize	Find	First	1-4 of 4	Last
Logical	Expression1	Condition Type	Expression 2	Edit	Delete						
	A.INSTITUTION - Academic Institution	equal to	:1	Edit							
AND	A.STRM - Term	equal to	:2	Edit							
OR	(TO_CHAR(A.CLASS_NBR)	equal to	:3)	Edit							
	''	equal to	:3)	Edit							

Save Save As New Query Preferences Properties Publish as Feed New Union

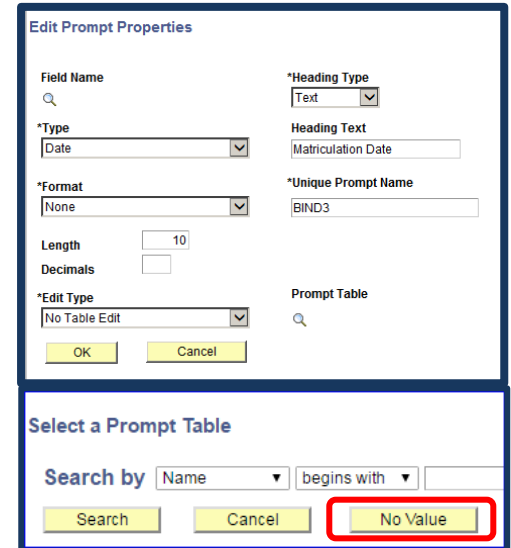


Criteria
Logical
AND
AND NOT
OR
OR NOT

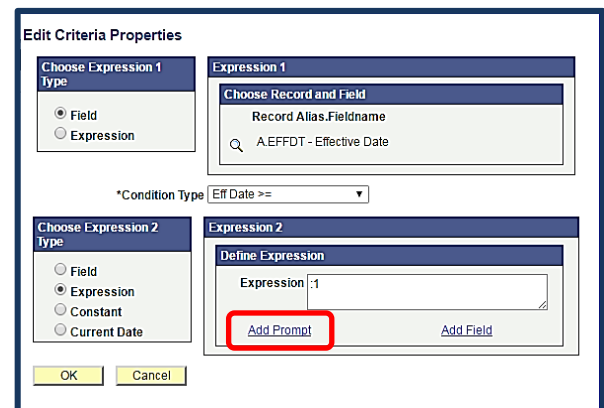
Date Prompt

To create a Standard Date Prompt:

- Create the Date Prompt
 - Go to Prompts tab and click on “Add Prompt”.
 - Leave the *Field Name* blank.
 - *Heading Type* should be *Text*.
 - On *Type* drop down select *Date*.
 - Type the name of the Prompt in the *Heading Text* Field.
 - On *Format* drop down select *None*.
 - On *Edit Type* select *No Table Edit*.
 - Finally on *Prompt Table* click on "Magnifying Glass" icon and click on “No Value” button.
 - Click the “Ok” button.




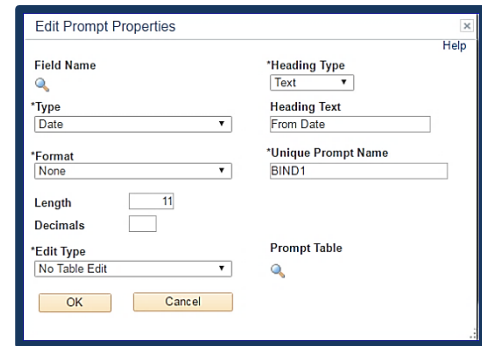
- Link the Date Prompt to the Selected Field as Query Criteria
 - From the Criteria Tab click on “Add Criteria”.
 - Select *Field* for *Choose Expression 1 Type*.
 - In Expression 1 select the Date Field where to tie the Prompt by using the “Magnifying Glass” icon. (Alternately, go to the Fields page and use the “Add Criteria” Icon next to the selected Field.)
 - Select the Operator. In this case Eff Date >= was selected.
 - In "Choose Expression 2 Type select *Expression*
 - In *Expression 2* click on “Add Prompt”.
 - Select the Date Prompt previously created.
 - Click “Ok”.
 - Click “Save”



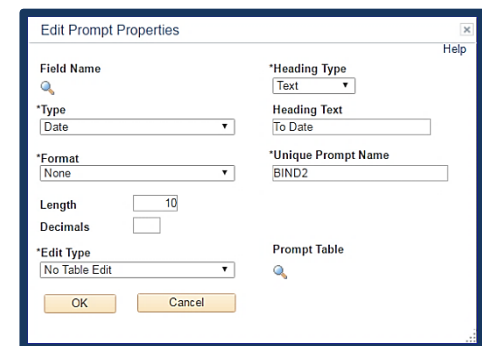
DATE RANGE PROMPT

To create a Date Range prompt where random date range can be select it is necessary to create 2 Date prompts then link them through a criteria added to the date field.

- Create the First Date Prompt
 - Go to the Prompts tab and click on “Add Prompt”.
 - Heading Text should be Text.
 - Type “From Date” in the Heading Text Field.
 - Select Date on the Type drop down list.
 - On the Format drop down list, select None.
 - On Edit Type select No Table Edit.
 - For the Prompt Table click on the "Magnifying Glass" icon and click on the “No Value” button.
 - Click “OK”.
- Create the Second Date Prompt
 - Go to the Prompts tab and click on “Add Prompt”.
 - Heading Text should be Text.
 - Type “To Date” in the Heading Text Field.
 - Select Date on the Type drop down list.
 - On the Format drop down list, select None.
 - On Edit Type select No Table Edit.
 - For the Prompt Table click on the "Magnifying Glass" icon and click on the “No Value” button.
 - Click “OK”.
- Match your Prompts to the Selected Date Field and Add Query Criteria
 - Go to the Fields tab and identify the Date Field to tie to your Prompts.
 - Click on the “Add Criteria”  icon.
 - As this was done from the Fields tab Choose Expression 1 and Expression 1 Choose Record and Field will be already filled in with the information from the selected Field.
 - For Condition Type select Between from the drop down list.
 - For Choose Expression 2 Type select the Expr – Expr radio button.
 - On Expression 2 – Define Expression click “Add Prompt”.
 - Select and link the “From Date” Prompt.
 - On Expression2 – Define Expression 2 click “Add Prompt”
 - Select and link the “To Date” Prompt.
 - "Save".

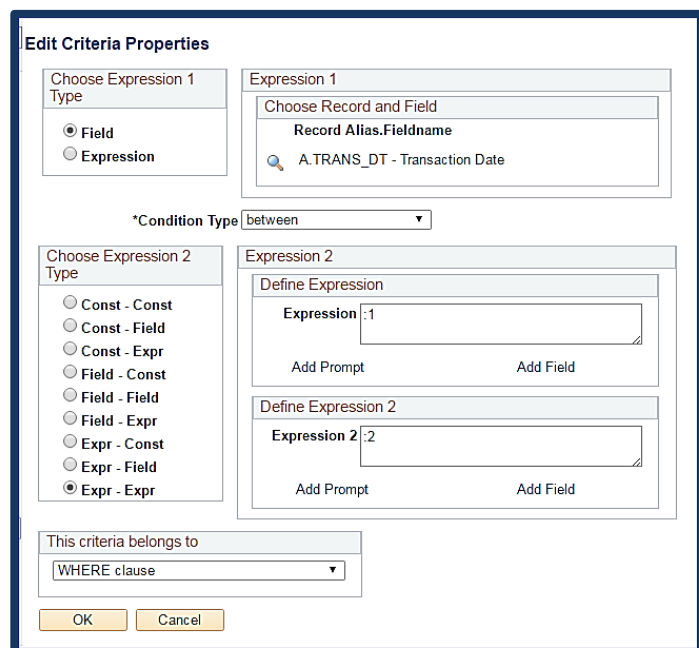


Field Name: [Search icon]
 *Type: Date
 *Format: None
 Length: 11
 Decimals: []
 *Edit Type: No Table Edit
 *Heading Type: Text
 Heading Text: From Date
 *Unique Prompt Name: BIND1
 Prompt Table: [Search icon]
 OK Cancel



Field Name: [Search icon]
 *Type: Date
 *Format: None
 Length: 10
 Decimals: []
 *Edit Type: No Table Edit
 *Heading Type: Text
 Heading Text: To Date
 *Unique Prompt Name: BIND2
 Prompt Table: [Search icon]
 OK Cancel

as




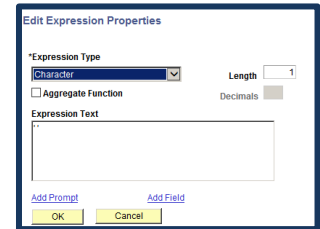
Choose Expression 1 Type: Field
 Expression 1: Choose Record and Field, Record Alias: Fieldname, A.TRANS_DT - Transaction Date
 *Condition Type: between
 Choose Expression 2 Type: Expr - Expr
 Expression 2: Define Expression, Expression 1, Add Prompt, Add Field, Define Expression 2, Expression 2, Add Prompt, Add Field
 This criteria belongs to: WHERE clause
 OK Cancel

Prompt with wildcard (%)

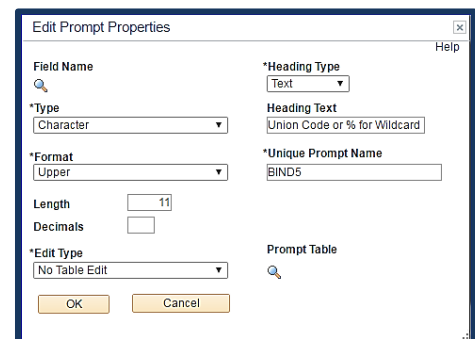
This prompt allows users to select either one value or multiple values. For example, if using Union Codes the user could type in W% to search all codes beginning with W or the partial code 17% to find all codes starting with 17 or simply % to search all possible codes.

Create a new Expression in the Expression tab.

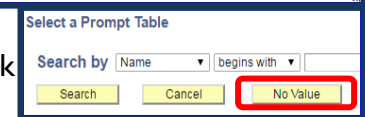
- In *Expression Text* enter: ' ' (apostrophe-space-apostrophe). It should look like the example to the right.
- Click "OK".
- Add your Expression as an Optional Prompt to the Query Criteria
 - Go to the *Criteria* tab click the "Add Criteria" button.
 - Select *Expression* in *Expression 1 Type*.
 - Click on the "Magnifying Glass" icon to search for the desired Expression in *Expression 1* – and click to select.
 - Select *Prompt* in *Choose Expression 2 Type*.
 - Select "New Prompt" in *Expression 2 – Define Prompt* to create the Optional Prompt.
 - Leave the *Field Name* blank.
 - Select *Text* from the *Heading Text* drop down list.
 - Type the Prompt Name in the *Heading Text* Field. Be sure to include instructions regarding Wildcard.
 - The *Edit Type* Field should be *No Table Edit*.
 - Click on the "Magnifying Glass" icon to select a Prompt table. Click on "No Value".
- Match the Selected Field to the Optional Prompt
 - Go to the *Fields* tab and click on the "Add Criteria"  icon next to the Field to be used for the Prompt.
 - Select the *Condition Type* of *Like*.
 - Select *Prompt* for the *Choose Expression 2 Type*.
 - Click on the "Magnifying Glass" icon to search for the Optional Prompt and click to select it.
 - Click "OK".
- Make the final Criteria modifications
 - Navigate to the *Criteria* Tab.
 - Click the "Group Criteria" button.
 - Add left and right parenthesis to group both criteria:
 - Click "OK".
 - Change the operator in the *Logical* column to *Or* and click "Save".



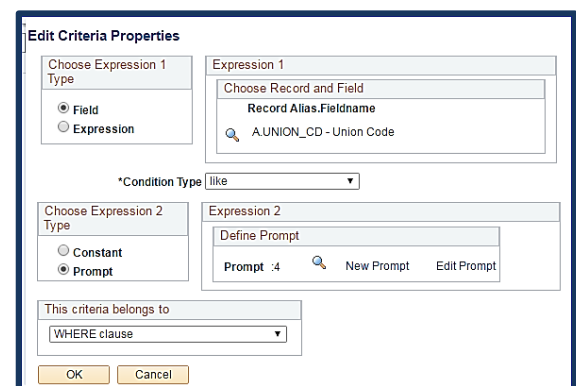
Dialog box titled "Edit Expression Properties". It has a tab labeled "Expression Type" with a dropdown menu set to "Character". There is a "Length" field set to "1" and a "Decimals" field. Below is an "Expression Text" area with a text box containing a single space character ' '. At the bottom are "Add Prompt", "Add Field", "OK", and "Cancel" buttons.



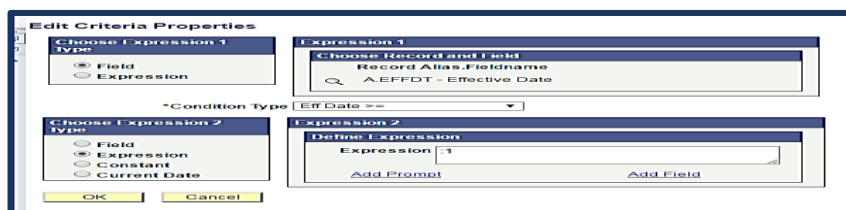
Dialog box titled "Edit Prompt Properties". It has a "Field Name" field with a magnifying glass icon. The "Type" dropdown is set to "Character", "Format" to "Upper", "Length" to "11", and "Decimals" is empty. The "Heading Type" dropdown is set to "Text", and the "Heading Text" field contains "Union Code or % for Wildcard". The "Unique Prompt Name" field contains "BIND5". The "Edit Type" dropdown is set to "No Table Edit". At the bottom are "OK" and "Cancel" buttons.



Dialog box titled "Select a Prompt Table". It has a "Search by" dropdown set to "Name" and a "begins with" dropdown. Below is a "Search" button and a "Cancel" button. The "No Value" button is highlighted with a red rectangle.



Dialog box titled "Edit Criteria Properties". It has two main sections: "Choose Expression 1 Type" and "Choose Expression 2 Type". In the first section, "Field" is selected, and the "Condition Type" dropdown is set to "like". In the second section, "Prompt" is selected. Below these are fields for "Expression 1" (containing "Record Alias.Fieldname" and "A.UNION_CD - Union Code") and "Expression 2" (containing "Prompt :4", "New Prompt", and "Edit Prompt"). At the bottom is a dropdown for "This criteria belongs to" set to "WHERE clause". "OK" and "Cancel" buttons are at the bottom.



Dialog box titled "Criteria". It has a "Logical" column with a dropdown menu. The dropdown is open, showing options: "AND", "AND NOT", "OR", and "OR NOT". The "OR" option is highlighted. There are "OK" and "Cancel" buttons at the bottom.

Fields that Don't Match (but look like they do)

There are times that Fields look as though they contain the same type of data across all Records, however that may not always be the case. In the example of EMPLID we see that EMPLID will refer to a Student in a Student Record, a Manager in a Manager Record and an Instructor in a Class Record, etc. Take extra care in using these types of Fields in joining Records together.

For example, in looking at two common Records: STDNT_ENRL and CLASS_TBL you will see that both Records contain the Field EMPLID. The EMPLID Field in the STDNT_ENRL table refers to the Student EMPLID while the one in the CLASS_TBL Record refers to the Instructor EMPLID. Trying to join these two Records by the EMPLID will produce inconsistent results.

PS Query Core Tables

Now that you have a better understanding of how data is stored and the Pillars being implemented by ctcLink, let's take a look at some of the core tables per Pillar to use in developing Queries. Knowing where to find the correct data is one of the most important components of building successful Queries in PeopleSoft.

Campus Solutions

ENROLLMENTS

STDNT_ENRL

CLASS

CLASS_TBL
 CLASS_ATTRIBUTE
 CRSE_OFFER
 STDNT_GRP_HIST
 CTC_STDNT_FTE
 STDNT_ATTR_DTL

STUDENT GROUPS:

VCS_STDNT_GROUP - Special programs and demographics by Term (very helpful for future or past terms)

STUDENT BIO-DEMO

PS_SCC_PERDATA_QVW
 (contains student name)
 PS_RESIDENCY_OFF
 PS_EMAIL_ADDRESSES
 PS_PERSON
 PS_NAMES_VW
 PS_ADDRESSES
 PS_PERS_DATA_EFFDT
 PS_VISA_PMT_DATA
 PS_DIVERS_ETHNIC
 PS_ETHNIC_GRP_TBL

STUDENT PLANS

ACAD_PLAN_VW
 ACAD_PLAN_TBL

SERVICE INDICATORS:

SRVC_IND_DATA - Service Indicator Data
 SRVC_IND_SEL_VW - Svc Ind Active Vw

Finance

PS_VOUCHER

GENERAL LEDGER

LEDGER
 PS_LEDGER
 JRNL_HEADER
 JRNL_LN
 GL_ACCOUNT_TBL

PROJECTS

PROJECT
 PROJ_RESOURCE
 PROJECT_STATUS
 PROJ_TYPE_TBL

COMMITMENT CONTROL

KK_SOURCE_HDR
 KK_SOURCE_LN
 KK_ACTIVITY_LOG
 LEDGER_KK

BILLING

BI_ACCT_ENTY
 BI_LINE_DST
 BI_LINE_DST_AR
 BI_LINE

ACCOUNTS RECEIVABLE

CUSTOMER
 CUST_AGING
 CUST_HISTORY
 ITEM_DST

ACCOUNTS PAYABLE

VOUCHER
 VCHR_ACCTG_LINE
 PAYMENT_TBL
 PYMNT_VCHR_XREF

PURCHASING

PO_HDR
 PO_LINE
 PO_LINE_MATCHED
 PO_LINE_DISTRIB
 PO_APPROVAL
 PO_LINE_SHII

ASSET MANAGEMENT

DIST_LN

CONTRACTS & GRANTS

CA_ACCTG_LINE
 CNTRCT_LINE
 CNTRCT_HDR
 GM_AWARD
 GM_PROPOSAL

TRAVEL & EXPENSE

EX_ACCTG_LINE
 EX_SHEET_DIST
 EX_SHEET_HDR

CASH

MANAGEMENT/TREASURY

TRA_ACCTG_HDR
 TRA_ACCTG_LINE
 BANK_STMT_TBL

HCM (HCM TO FINANCE)

HR_ACCTG_LINE
CS (STUDENT FINANCIALS TO FINANCE)

SF_ACCTG_LN

Human Capital

HR_ACCTG_LINE
 PAY_CHECK
 PAY_DEDUCTION
 PAY_EARNINGS
 PAY_TAX
 PAY_GARNISH
 GENL_DED_TBL
 EMPLOYEES
 PERSON_NAME
 NAMES
 PERSONAL_DATA
 DEDUCTION_TBL
 DEDUCTION_CLASS
 JOB
 CURRENT_JOB
 JOBCODE_TBL
 DEPT_TBL
 HR_BARG_UNIT
 UNION_TBL
 VENDOR
 PS_PERS_DATA_USA
 PS_PERS_DATAEFFDT
 PS_DISABILITY
 PS_DIVERS_ETHNIC
 PS_ETHNIC_GRP_TBL

Prompt Tables to Use

Campus Solutions (CS)

Field	Prompt Table
ACAD_CAREER	ACAD_CAR_SCRTY
ACAD_ORG	ACAD_ORG_TBL
ACAD_PROG	ACAD_PROG_TBL
ACAD_STNDNG_ACTN	ACAD_STACTN_VW
ADMIT_TYPE	ADMIT_TYPE_TBL
Business Unit	BUS_UNIT_TBL_SF
CHECKLIST_CD (FA)	CS_CHKLST_TBL
Class Number	SE_CLASS_NBR_VW
EXTERNAL ORGANIZATION	EXT_ORGSCHL_VW
INSTITUTION	INSTITUTN_SCRTY
INSTRUCTOR or ADVISOR ID	INSTR_ADVSR_VW
ITEM_TYPE (for SF on SETID)	ITEM_TYPE_VW
ITEM_TYPE	ITEM_TYPE_BU_VW
RVC_IND_REASON	SRVC_IN_RSN_TBL
SESSION_CODE	SESSION_CODE_VW
SRVC_IND_CD	SRVC_IND_CD_TBL
STDNT_GROUP	STDNT_GROUP_TBL
TERM	TERM_VAL_TBL

Finance (FIN)

Field	Prompt Table
ACCOUNT	GL_ACCT_NS_VW
BUS_UNIT (SECURITY)	SP_BUS_FS_OPRVW
BUSINESS_UNIT	SP_PCBUGL_CLSVW
CLASS_FLD	CLASS_CF_TBL
COMBINATION	COMBO_RULE_VW
DEPTID	DEPT_TBL
FUND_CODE	FUND_NS_VW
MANAGER_ID, EMPLID	PERSONAL_DATA
OPERATING_UNIT	OPER_UNIT_TBL
PROJECT_ID	PROJECT_ID_VW
SETID	SP_SETID_CLSVW
SETID (SECURITY)	PS_SP_SETID_OPRVW

Human Capital Management (HCM)

Field	Prompt Table
Business Unit	BUSUNIT_HR_VW
Business Unit	BUS_UNIT_TBL_HR
Calendar Group Id	GP_RSLT_ACM_VW
Company	COMPANY_TBL
Department (CF)	
Department (HR)	HR_DEPTL_LY3_VW
EMPLID	BAS_EVT_EMPLID
Employee Type (empl_class)	CTC_EMPLCLASS_V
Fund Code	FUND_VW
GP_PAYGROUP	PAYGROUP_TBL
JOB CODE	JOB CODE_TBL
PAY_END_DT	CTC_PAYENDDT_VW
SETID	DEPT_SETID_VW
TASKGROUP	TL_TASKGROUP_TBL
TERM (PTF YRQ)	CTC_PTFTERM_VW

Running Large Queries

Quick Reference Guide

Purpose: Use this document as a reference for running Large Result Delivered Queries in ctcLink.

Audience: All College Staff in Finance, Human Capital Management (HCM), and Campus Solutions (CS) functions. The procedures listed below may be limited based on security access.

What are Large Result Delivered Queries?

Delivered Queries are Queries that have been developed and are used to retrieve selected data. **Large Result Delivered Queries** are Queries that have an output that is too large to view in **Query Viewer**. These Queries should be run in **Query Scheduler**.

Who will use ctcLink Large Result Delivered Queries?

Finance, HCM, and CS staff when large amounts of operational data is needed. Usage is based on security access.

Running a Large Result Delivered Query

Navigation: Main Menu → Reporting Tools → Query → Query Viewer

Use the *Running Reports, Jobs, and Queries in ctcLink* Quick Reference Guide for steps on running a delivered Query.

1. If a delivered Query results are too large to view in **Query Viewer**, the below error message will result.

Query Result Set too Large. (124,87)

Result of 'SQL Fetch' is over the maximum result size specified for the application server. Modify your query or increase the maximum result size.

2. **Query Scheduler** allows you to run **Large Result Delivered Queries**. In **Query Viewer**, under the **Search Results**, click on the **Schedule** link.

Search Results

*Folder View -- All Folders --

Query		Personalize Find View All		First 1 of 1 Last				
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
EXAMPLE_QUERY	SAMPLE QUERY	Public		HTML	Excel	XML	Schedule	Favorite

3. The **Scheduled Query** page will appear, prompting you to either create a new or find an existing **Run Control ID**.
4. **Run Control IDs** are tied to a user ID and are visible only to the creator. Instead of entering the same values each time a Query is scheduled; a **Run Control** can be saved with these settings. The next time the Query is scheduled, the **Run Control ID** is selected and the system completes the settings with the previously defined parameters.
 - a. To run an existing **Run Control ID**, click the **Find an Existing Value** tab. Type in the name of the **Run Control ID** you wish to retrieve. Click **Search**. Click on the **Run Control ID** you want to run.
 - b. To create a new **Run Control ID**, click on **Add a New Value** tab. Type a **Run Control ID**, using alpha numeric characters with no spaces. Underscore should be used for spacing. Click **Add**.

Scheduled Query

Find an Existing Value **Add a New Value**

Private Query: ☐

Query Name: EXAMPLE_QUERY

Run Control ID: MJ_EXAMPLE_QUERY


Add


5. If there are prompt(s) associated with the Query (i.e. Institution or Business Unit), a pop up screen will appear asking you to populate the prompt(s). Not all Queries will have prompt(s).
6. The **Process Scheduler Request** screen will appear. Select additional choices on how the **Scheduled Query** will run.
 - a. **Server Name** should remain blank.
 - b. **Recurrence** will indicate how frequently the **Schedule Query** should run. Leave blank for a one-time occurrence.
 - c. **Run Date** and **RunTime** indicates when the **Scheduled Query** will run. The default settings are to run the **Scheduled Query** immediately. **Scheduled Queries** can also be run at future dates and times.
7. From the **Process List**, use the dropdowns to make the below choices.
 - a. **Type** (Email/Feed/File/IB Node/Web/Window). It is recommended to run **Large Result Delivered Queries** as **Web**.


- b. **Format** (HTM/PDF /TXT/XFORM/XLS/XML/XMLP). It is recommended to run **Large Result Delivered** Queries as a **TXT** format. This will result in an Excel output file. Click **OK**.

Process Scheduler Request

User ID CTC_MJOHNSON Run Control ID MJ_EXAMPLE_QUERY

Server Name Run Date 06/15/2015 

Recurrence Run Time 4:09:58PM 

Time Zone 

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web	TXT	Distribution

Process Monitor

Navigation: Main Menu → PeopleTools → Process Scheduler → Process Monitor

- To view the Query Scheduler output, navigate to **Process Monitor**.
- The **Scheduled Query** should be listed in the **Process Monitor**. The **Scheduled Query** is ready to retrieve when the **Run Status** shows **Success**.
- When the **Scheduled Query** indicates it has run successfully, click on the **Details** link.
- The **Process Detail** screen will appear. This screen gives details on the **Parameters** used; the **Message Log** gives detail if there are errors running the **Scheduled Query**.
- Click on the **View Log/Trace** link to retrieve the **Scheduled Query**.
- Click on the output file. The output file will include the **Scheduled Query** name and the **Process Instance Number** in the name. It will be a .csv file if you selected to run a **TXT**.
- A pop up window will ask what application to open the **Scheduled Query** with. If you selected **TXT**, the default is Microsoft Excel. Click **OK**.
- The **Scheduled Query** output is now available as an Excel file.

Running Reports, Jobs, and Queries in ctcLink Quick Reference Guide

Purpose: Use this document as a reference on running delivered Reports, Jobs, and delivered Queries in ctcLink.

Audience: All College Staff in Finance, Human Capital Management (HCM), and Campus Solutions (CS) functions. The procedures listed below may be limited based on security access.

What are ctcLink Reports, Jobs, and Queries?

A **Report** in ctcLink is an existing report that has defined elements. **Jobs** are collections of ctcLink processing tasks. The term job and process are often used interchangeably. A report is considered a job, so the directions for running a report and job are the same. A **Query** is a tool used to retrieve selected data.

Who will use ctcLink Reports, Jobs, and Queries?

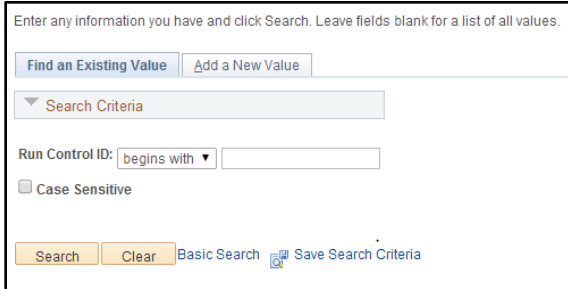
Finance, HCM, and CS staff when functional reports or data are needed. Usage is based on security access.

Running a Report or Job

Navigation: Main Menu → *Function* → *Sub-function* → *Reports* → *Report Title*

- Select **Add a New Value** if this is the first time running this job.

2. **Run Control IDs** are tied to an individual user ID and are visible only to the creator. Instead of entering the same values each time a report is run (such as when the report should run and prompts such as BUSINESS_UNIT); a **Run Control** can be saved with these settings. The next time the report is run, a **Run Control ID** is selected (in **Find an Existing Value**), and the system completes the settings with previously defined parameters. Be aware that certain Reports and Jobs may need to have a new **Run Control** depending on the parameters used. Type a **Run Control ID**, using alpha numeric characters with no spaces. Underscore can be used for spacing i.e. **AP1_LastName**.



Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Search Criteria

Run Control ID: begins with

☐ Case Sensitive

Search Clear Basic Search Save Search Criteria

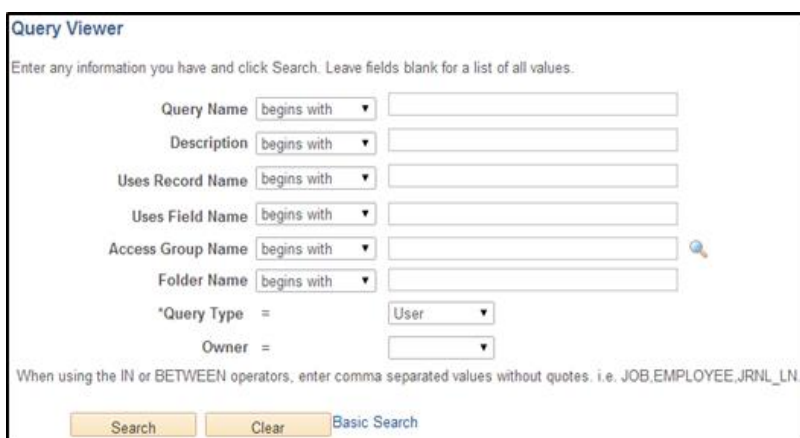
3. Click **Add**.
4. Select parameters for the job. Parameters will vary depending on the job. The next time this job is run, the **Run Control ID** is entered and the saved parameters will appear.
5. Click **Save**.
6. Click **Run** to add the job to the **Process Scheduler** queue of jobs awaiting execution.
7. The **Process Scheduler Request** requires additional choices on how the report/job will run. These choices are **Server Name**, **Recurrence** (leave blank if one-time occurrence), and **Run Date/Time** (when report will run).
8. Select report from the **Process List**. From the dropdowns, choose the **Type** (email / File / Printer / Web) and **Format** (HTM / PDF / RTF / XLS) then click **OK**.
9. After scheduling a job to run, the **Run Control Page** will display a unique **Process Instance** number. Please note the number; it will be helpful for troubleshooting if needed. The **Process Monitor** is generally used to track the progress of a job and insure its success. **Report Manager** is generally used to review the job output of a report.
10. In **Process Monitor**, the filters can be used to limit the **Process List** or the existing **Process List** to see the recent jobs that have been run. The **Process List** includes **Process Type**, **Process Name**, **UserID**, **Run Date/Time**, **Run Status** (Queued, Initiated, Cancelled, Success), **Distribution Status** (N/A, None, Generated, Not Posted, Posting, or Posted), and **Details**. If the **Run Status** indicates Success, the reports can be viewed in **Report Manager**. The **Process Detail** page contains the **Message Log** which helps troubleshooting if the report did not run successfully.
11. Click **Report Manager** to view the reports you've run. Click the **Administration** tab to see successfully run reports. Click the **Details** link to view the report. Reports can be deleted on this page for staff with this authorization.

Running a Delivered Query

Use the following process to run a delivered Query in ctcLink.

Navigation: Main Menu → Reporting Tools → Query → Query Viewer.

8. Click **Advanced Search** to find Queries based on selected filters.
9. Enter filters for **Query Name**, **Description**, **Uses Record Name**, **Uses Field Name**, **Access Group Folder** (functional Query security group), and **Folder Name**. Within these filters, selections include <, ≤, =, >, ≥, **begins with**, **between**, **contains**, **in**, and **not**. The percentage sign (%) is used as a wildcard character.



Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

Query Name

Description

Uses Record Name

Uses Field Name

Access Group Name

Folder Name

*Query Type =

Owner =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB.EMPLOYEE.JRNL_LN.

[Basic Search](#)

10. Additional filters include: **Query Type** by **Archive**, **Process**, **Role**, or **User** and **Owner** by **Private** or **Public**. Private Queries will be listed and can be run only if the Query owner has granted access.
11. After the filters are selected, click **Search**.
12. The **Search Results** grid displays Queries based on the selected filters. The Query can be run as **HTML** (web-based), **Excel**, **XML**, or **Schedule** a time for the Query to run using **Run Control ID**. The Query can be added to favorites for future quick access.

Additional Information

- Click on the magnify glass to see available look-up options.
- When searching for Queries or reports, it is recommended to use **Contains** for search parameters in **Description**.
- Descriptors in Name or Description are often shortened, such as Vendor to VNDR, so multiple searches may be needed.

Coding Manual Link

To navigate to the Student and Course Coding Manual click the link below:

[Student and Course Coding Manual](#)

FERPA Data Restrictions in Campus Solutions

Here we will discuss how to exclude students with FERPA restrictions in queries (Campus Solutions). Currently, the best way to identify students who've chosen to restrict data is to utilize the FERPA field in records SCC_PERDATA_QVW (recommended) or PERSONAL_DATA. The FERPA field in both of these records will be "Y" if a student has restricted *any* data. The SCC_PERDATA_QVW or PERSONAL_DATA records are great to use for bio-demo information (name, address, phone, birthdate) and you have the option to easily exclude students who have *any* FERPA restriction when using them.

There are other records available (see below). However, we do not advise using them as testing has found they do not exclude students who have the related FERPA restriction(s). It would be

great to be able to use these records, but currently they are not accurate. Hopefully, the issue with the records below will be identified and they will be available for use later in the implementation.

ACTVTS_FERPA_VW - FERPA Activities View
ADDR_FERPA_VW - FERPA Address View
EMAIL_FERPA_VW - EMAIL FERPA VIEW
NAMES_FERPA_VW - FERPA Names View
PERSNL_FERPA_VW - FERPA Personal Data View
PHONES_FERPA_VW - Phone Ferpa View
PHOTO_FERPA_VW - FERPA Photo View

One record that is quite helpful in listing detail of a student's FERPA restrictions is FERPA_OVERRIDE, which lists students and their specific restrictions.