



# PeopleSoft End User Training

## Introduction to Query 8.3



# **Introduction to Query 8.3**

**Running a Public Query**

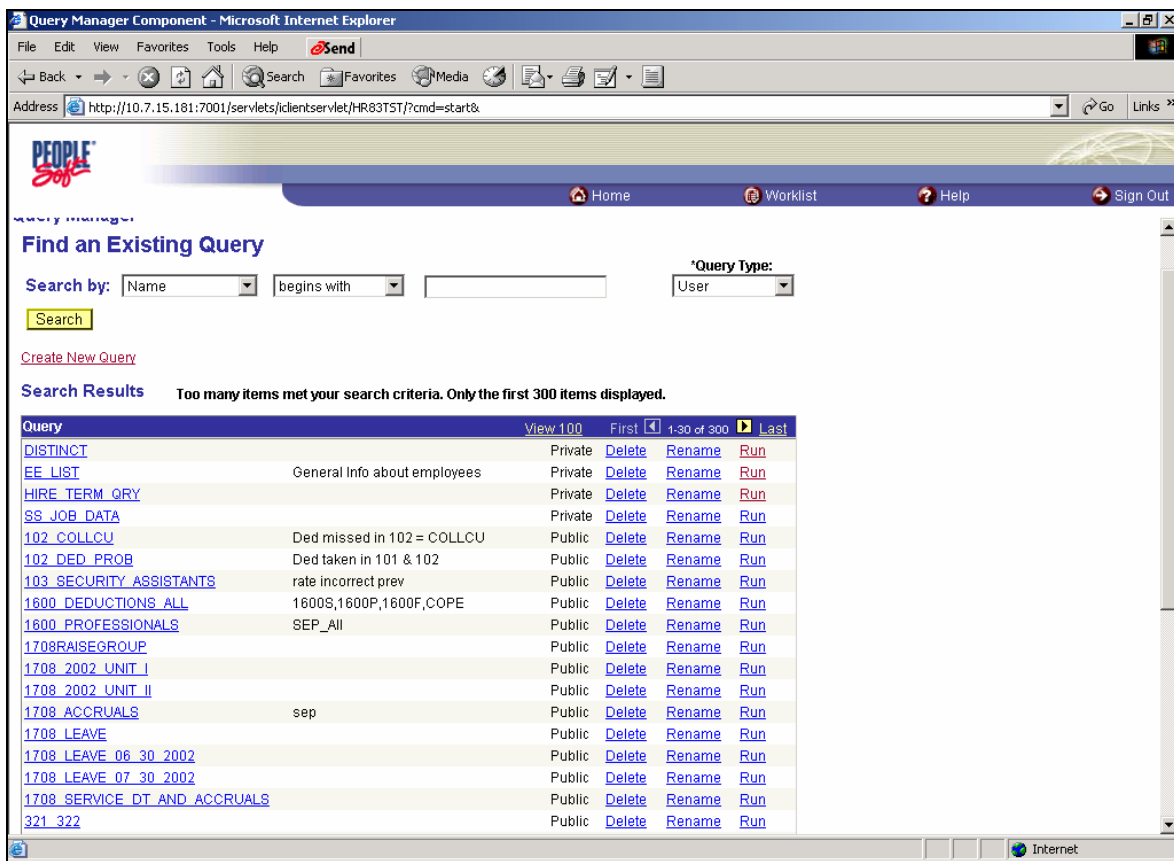
**Creating a New Query**

## Quick Reference Guide Running a Public Query

### Navigation

**PeopleTools \* Query Manager \* Use \* Query Manager**  
*The Query Manager Search page displays.*

Click the Search button Search.  
*All available queries displays.*




The following information is displayed for each query:

|                          |   |
|--------------------------|---|
| <b>Query Name</b>        | The database name of the query<br>The Query name is a hyperlink used to access Query Manager Edit mode. |
| <b>Query Description</b> | The description of the query entered upon creation.   |
| <b>Query Type</b>        | <b>Private</b> – Only the logged on User ID can modify or delete this query.                            |

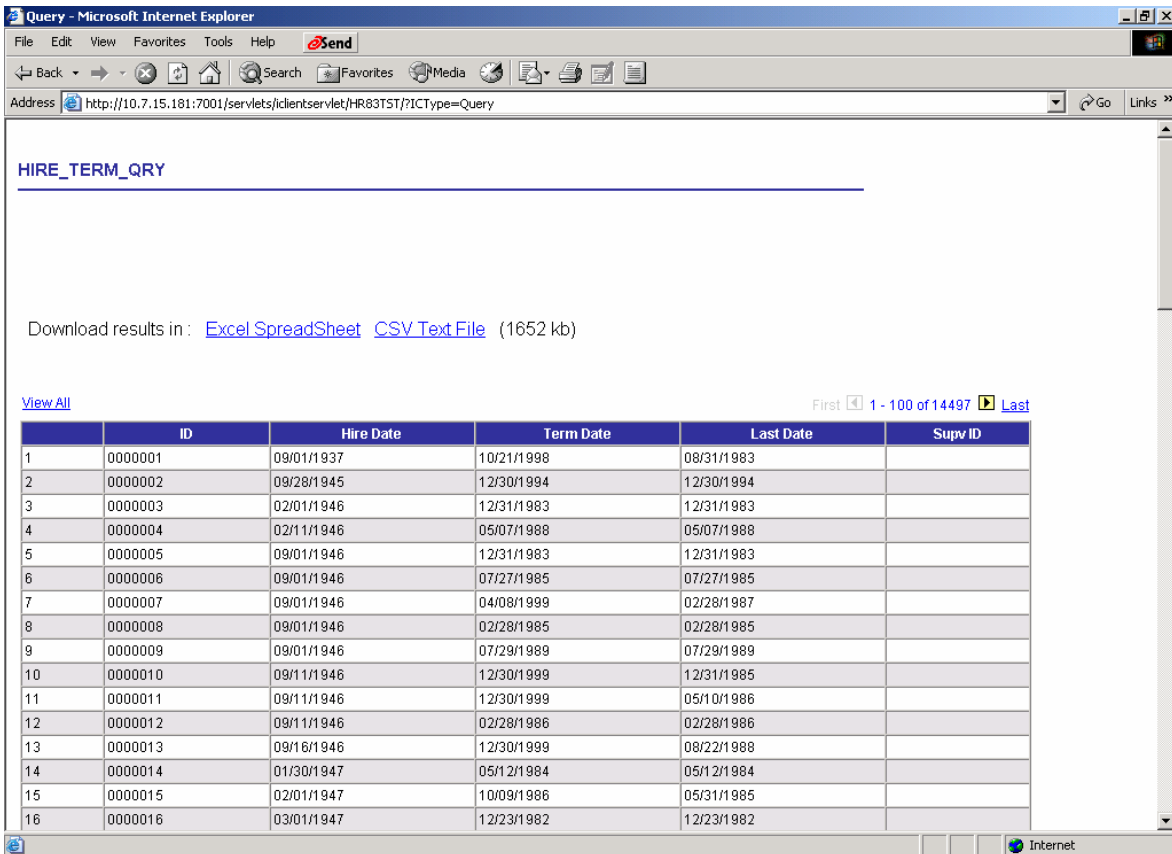
|               |  |
|---------------|--|
|               | <b>Public</b> – Any user can modify or delete this query.                        |
| <b>Delete</b> | A page will appear asking the user if it is OK to delete the query.              |
| <b>Rename</b> | A page will appear allowing the user to modify the query name.                   |
| <b>Run</b>    | The query will be executed and the results will display in a new browser window. |

Locate the query you would like to run.

The  button advances to the next queries in the list.

Click **Run** for the query you would like to run.

A new window opens with the results of the query. From this online display, you can print your results or download it in Excel.



Download results in : [Excel Spreadsheet](#) [CSV Text File](#) (1652 kb)

[View All](#) First 1 - 100 of 14497 Last

|    | ID      | Hire Date  | Term Date  | Last Date  | Supv ID |
|----|---------|------------|------------|------------|---------|
| 1  | 0000001 | 09/01/1937 | 10/21/1998 | 08/31/1983 |         |
| 2  | 0000002 | 09/28/1945 | 12/30/1994 | 12/30/1994 |         |
| 3  | 0000003 | 02/01/1946 | 12/31/1983 | 12/31/1983 |         |
| 4  | 0000004 | 02/11/1946 | 05/07/1988 | 05/07/1988 |         |
| 5  | 0000005 | 09/01/1946 | 12/31/1983 | 12/31/1983 |         |
| 6  | 0000006 | 09/01/1946 | 07/27/1985 | 07/27/1985 |         |
| 7  | 0000007 | 09/01/1946 | 04/08/1999 | 02/28/1987 |         |
| 8  | 0000008 | 09/01/1946 | 02/28/1985 | 02/28/1985 |         |
| 9  | 0000009 | 09/01/1946 | 07/29/1989 | 07/29/1989 |         |
| 10 | 0000010 | 09/11/1946 | 12/30/1999 | 12/31/1985 |         |
| 11 | 0000011 | 09/11/1946 | 12/30/1999 | 05/10/1986 |         |
| 12 | 0000012 | 09/11/1946 | 02/28/1986 | 02/28/1986 |         |
| 13 | 0000013 | 09/16/1946 | 12/30/1999 | 08/22/1988 |         |
| 14 | 0000014 | 01/30/1947 | 05/12/1984 | 05/12/1984 |         |
| 15 | 0000015 | 02/01/1947 | 10/09/1986 | 05/31/1985 |         |
| 16 | 0000016 | 03/01/1947 | 12/23/1982 | 12/23/1982 |         |

To print the query, click the **File** menu, then click the **Print** button to print all pages of the query.



To download the results in Excel, click the [Excel SpreadSheet](#) link.

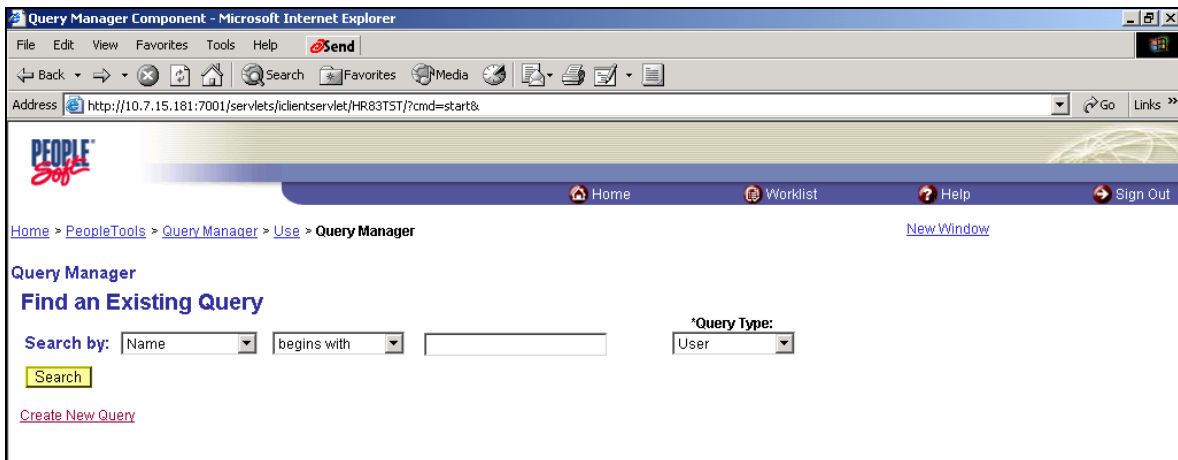
## Quick Reference Guide Creating a New Query

There are six steps to creating a basic query:

- Select the record(s).
- Select the field(s).
- Set the query preferences.
- Edit the field properties.
- Save the query.
- Execute the query.

### Navigation

**PeopleTools \* Query Manager \* Use \* Query Manager**  
*The Query Manager Search page displays.*



Click the **Create New Query** link.

Click the first drop-down arrow to select the **Search In** option. The options are:

- Name
- Search in Both

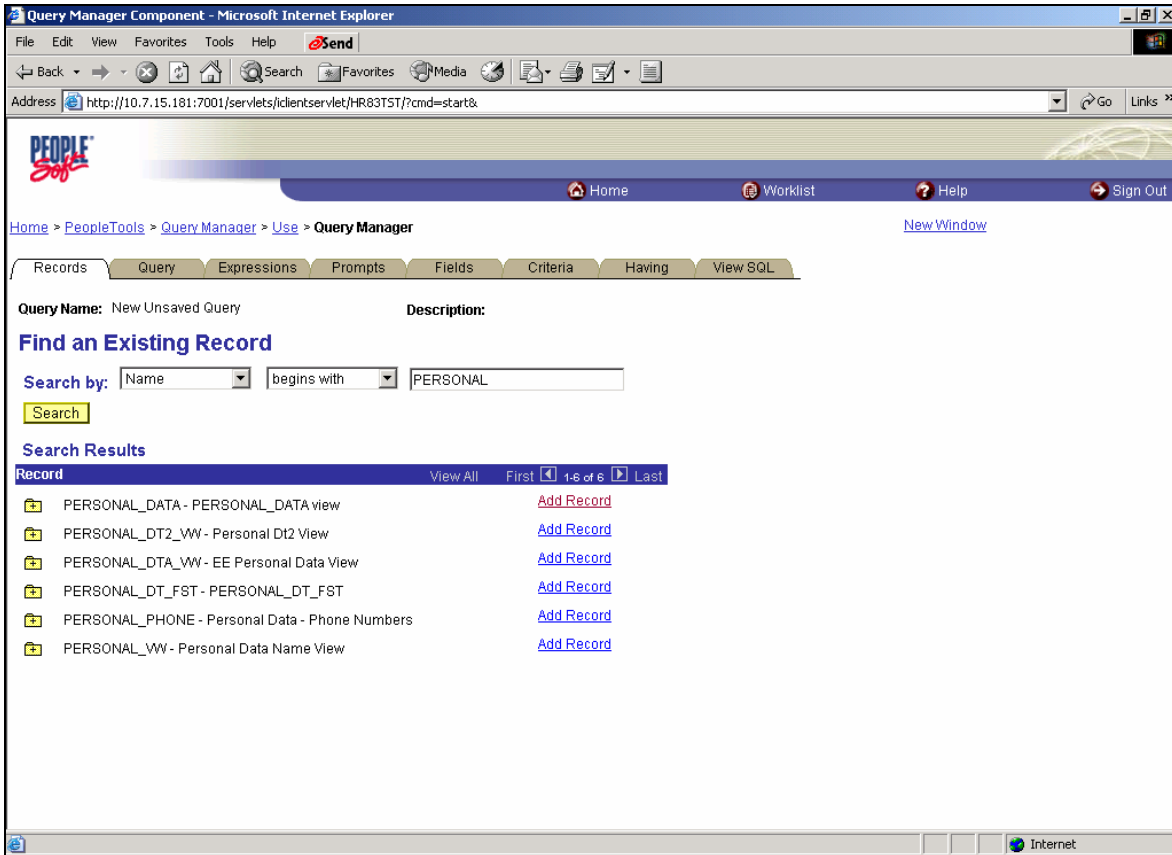
Click the second drop-down arrow to select a **Search Type**. The options are:

- Ends with

- begins with
- contains

Enter the text in the third search box on how you would like perform your search.

Click the **Search** Search button.  
*All available records for your search displays.*



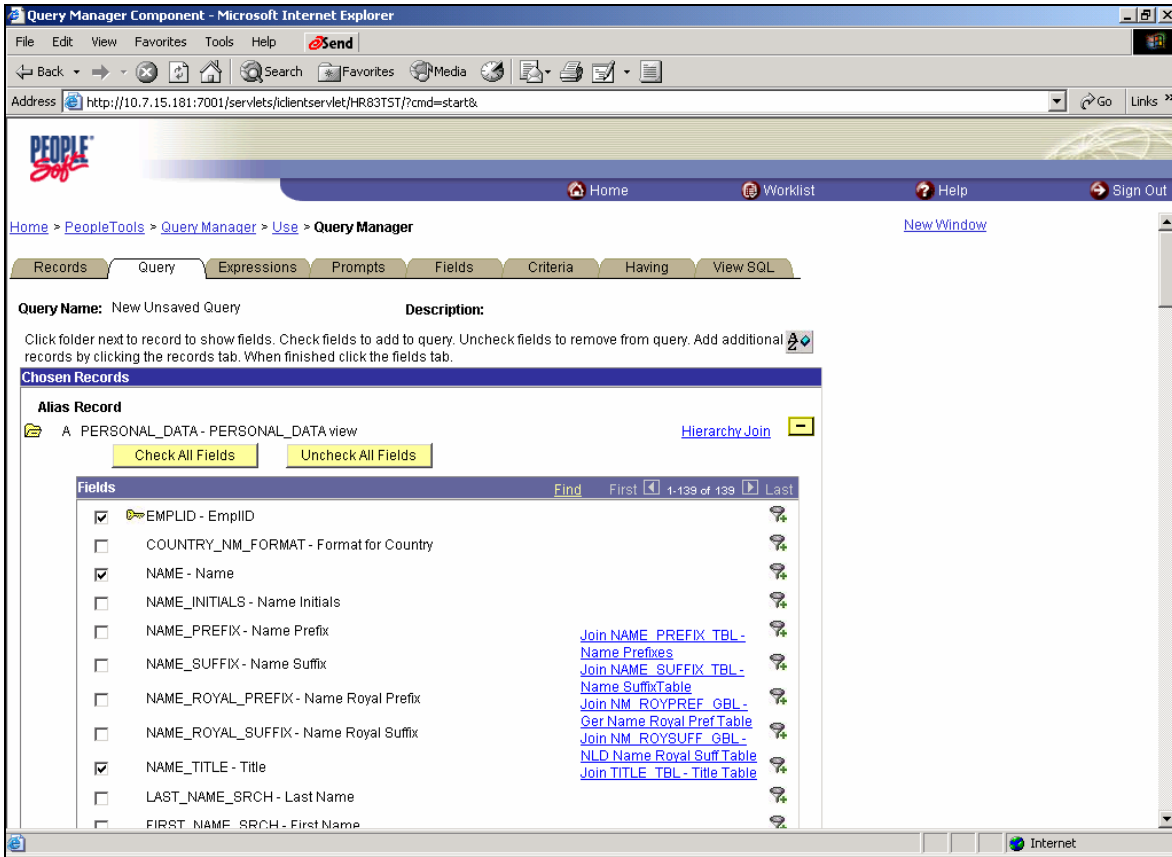
The following information is displayed for each record:

|                                  |  |
|----------------------------------|--|
| <b>Folder icon</b>               | Click on the icon to display all the fields associated with the record. This is useful to determine if the record is the correct one required for the query. |
| <b>Record Name – Description</b> | The database record name – the record description entered by the developer at the time the record was created.   |
| <b>Add Record</b>                | Click this hyperlink to select the record for this query.  |




Locate the record you would like select a record from.

Click the **Add Record** link for that record.

*The page displays all fields related to each record. You can use the scrollbars to find the fields required for the query.*



The following information is displayed on the page:

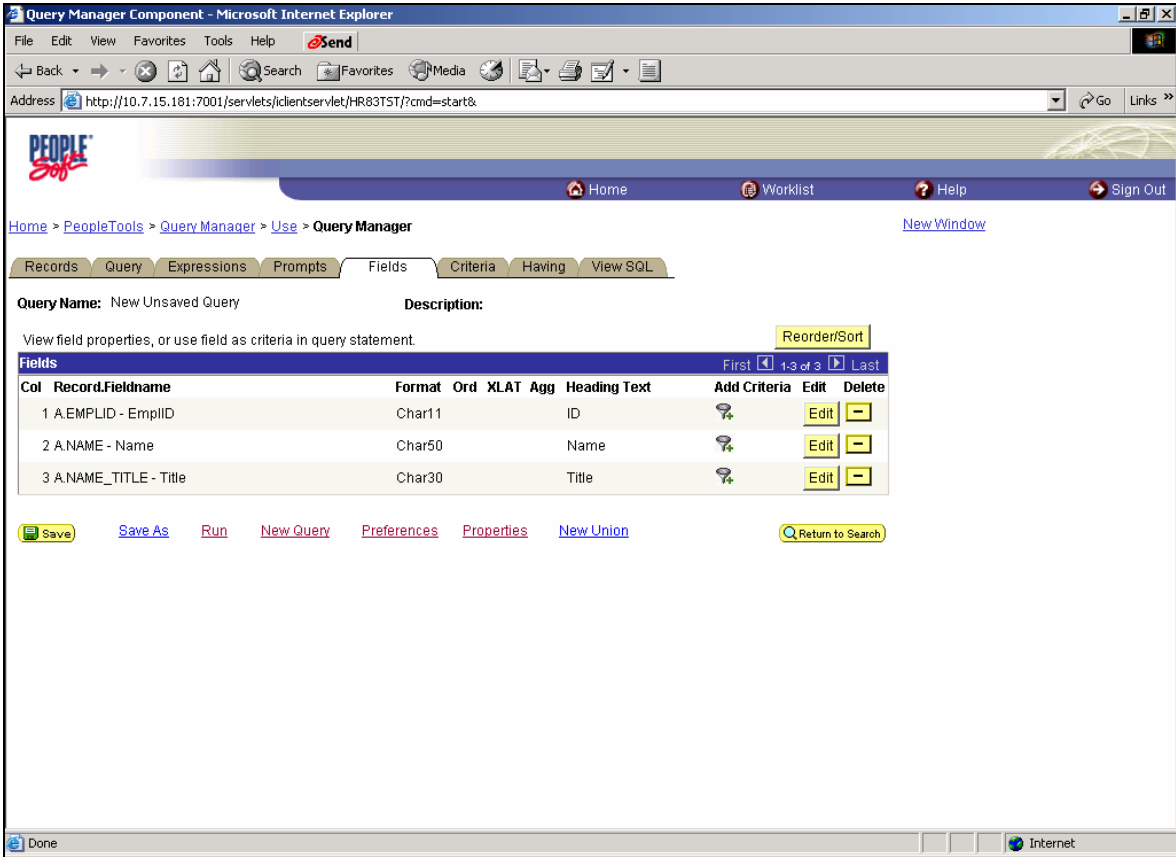
|   |  |
|---|--|
| <p><b>Sort button</b> </p>         | <p>Used to sort the field names alphabetically rather than the order they appear on the record.</p>                  |
| <p><b>Checkbox</b></p>  | <p>Check the box to select this field for the query.</p>   |
| <p><b>Key Symbol</b> </p>          | <p>Indicates the key fields for the record.</p>  |
| <p><b>Field</b></p>   | <p>The field name as it is stored in the database.</p>   |
| <p><b>Add Criteria button</b> </p> | <p>Used to add a row of criteria to the query. (Add Criteria button is discussed in "Running Advanced Queries").</p> |
| <p><b>Join Record Name</b></p>  | <p>Some fields are related to other records. Those related records</p>   |

|  |   |
|--|---|
|  | can be joined to this query using this hyperlink. |
|--|---|

Select the checkbox for the fields you would like to use in your query.




Click the **Fields** tab.

*The Fields page displays showing the fields you selected for your query.*



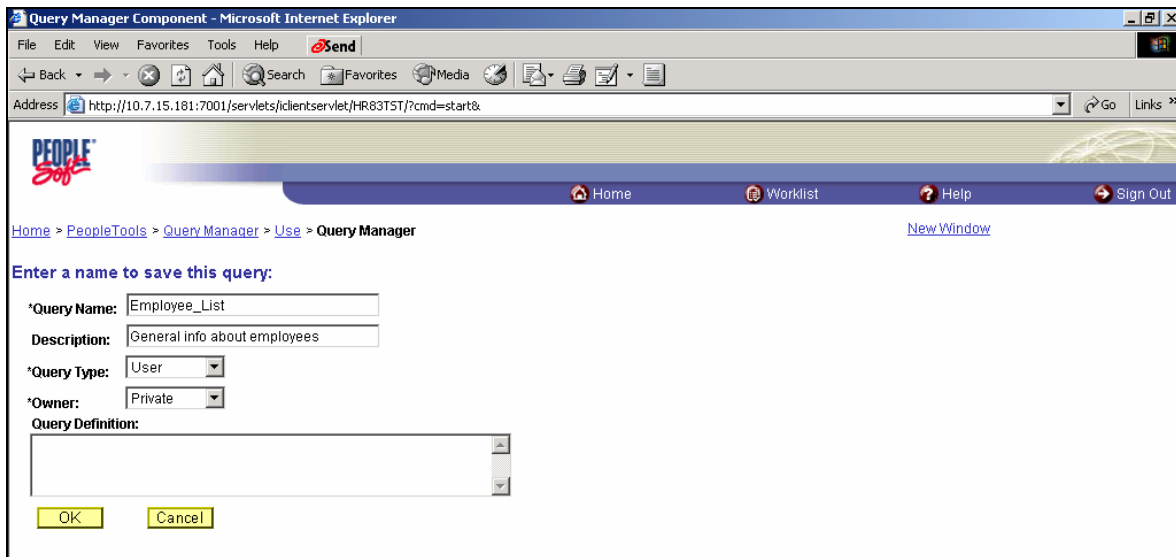
The following information is displayed on the page:

|               |   |
|---------------|---|
| <b>Col</b>    | This is the order in which the fields will be displayed in the query results. |
| <b>Field</b>  | The field name as it is stored in the database.                               |
| <b>Format</b> | This is the format of the field as it is defined in the database.             |
| <b>Ord</b>    | Indicates if this field has been selected to be used for sorting.             |
| <b>XLAT</b>   | This indicates if the field is a code from the translate table                |

|  |  |
|--|--|
| <b>Agg</b>   | This indicates if an aggregate function has been assigned to this field. |
| <b>Heading Text</b>  | The default text as defined in the database.                             |
| <b>Add Criteria button</b>  | Used to add a row of Criteria to the query.                              |
| <b>Edit button</b>          | Select this button to edit the field properties.                         |
| <b>Delete button</b>        | Select this button to deleted the field from the query.                  |

Click the **Save**  button.

*You will be prompted to enter information to save the query.*



Enter a **Query Name**.

*The Query Name can be up to 30 characters with no spaces in the name.*

Enter a **Description** for this query.

*The Description can be up to 30 characters.*

Click the **Query Type** drop-down arrow to select **User** or **Process**.

Click the **Owner** drop-down arrow to select **Private** or **Public**.

*This allows you to indicate who has access to the query. Private is the default. Only the Operator ID that created the query can open, run, modify or delete the query. Only the Operator ID that created the query can modify the owner to Public. Selecting Public means any user with access to all records used for the query can open, run, modify or delete the query.*

Enter a **Query Definition** if you would like to add more detail to the query.

Click **OK**.

*The query is saved.*

Click the [Run](#) link.

*A new window opens with the results of the query. From this online display, you can print your results or download it in Excel.*

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| ID | Name              | Title | Address 1               | Address 2 | Address 3 | Address 4 | City        | Postal    | Birthdate  |
|----|-------------------|-------|-------------------------|-----------|-----------|-----------|-------------|-----------|------------|
| 1  | Shabat,Oscar      |       | 3800 Lake Shore Dr      |           |           |           | Chicago     | 60613     | 08/17/1912 |
| 2  | Farrell,Mary      |       | 3851 Mission Hills Rd N |           |           |           | Northbrook  | 60062     | 02/19/1926 |
| 3  | Moriarty,Dorothy  |       | Box 673                 |           |           |           | Park Ridge  | 60068     | 01/05/1919 |
| 4  | Karanikas,Helen   |       | 618 N Harvey Av         |           |           |           | Oak Park    | 60302     | 08/22/1923 |
| 5  | Brille,Bernard    |       | P.O. Box 542            |           |           |           | Sarasota    | 34230     | 12/04/1922 |
| 6  | Slutsky,Bette     |       | 1300 Central Street     |           |           |           | Evanston    | 602011614 | 03/30/1925 |
| 7  | Slutsky,Irving    |       | 1300 Central Street     |           |           |           | Evanston    | 602011614 | 04/21/1918 |
| 8  | Chausow,Hymen     |       | 2836 Arlington Ave      |           |           |           | Highland P  | 60035     | 07/31/1920 |
| 9  | Young,Betty       |       | 714 Ringland Road       |           |           |           | Riverwoods  | 60015     | 08/02/1919 |
| 10 | Tish,Morris       |       | 4528 Main St            |           |           |           | Skokie      | 60076     | 10/27/1918 |
| 11 | Mueller,Estelle   |       | 8014 S Lawler Ave       |           |           |           | Burbank     | 60459     | 04/30/1916 |
| 12 | Hoffmeyer,Ruth    |       | 828 Brentwood Dr        |           |           |           | Bensenville | 60106     | 12/30/1917 |
| 13 | Clarke,Edith      |       | 2007 W. 101st St        |           |           |           | Chicago     | 60643     | 09/28/1918 |
| 14 | Liden Jr,Ernest   |       | 10010 Desert Rock Drive |           |           |           | Sun City    | 85351     | 05/04/1924 |
| 15 | Walgren,Bertil    |       | 621 Winston Drive       |           |           |           | Melrose Pa  | 60160     | 09/02/1916 |
| 16 | Skarbek,Jeannette |       | 404 Nottingham Drive    |           |           |           | Irving      | 750616454 | 01/25/1918 |

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