

SES/CAESAR QUERY TOOL

Running and Editing Queries

PS Query

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I - Introduction to Query:

PeopleSoft Query Overview:

PeopleSoft Query is an end user reporting tool that allows you to extract the precise information that you are looking for by using visual representations of the SES/CAESAR database, without writing Structured Query Language (SQL) statements. The queries that you write can be as simple or as complex as necessary; they can be one-time queries or queries that you use repeatedly. The query tool allows you to display query results on the page, run the results to excel, or schedule your query for a future run time.

Query Terminology:

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: (Also referred to as a “**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.

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 tables and views within the database, and returns the result set to the requester. 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 tables using matching columns.

Public Query: Public queries are viewable and editable by any user with access to Query Manager and the proper table 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 table whose values uniquely identify the rows in the table. A primary key value cannot be NULL.

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

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

Navigation to Query Manager:

From the Menu, Navigate to Reporting Tools à Query à Query Manager



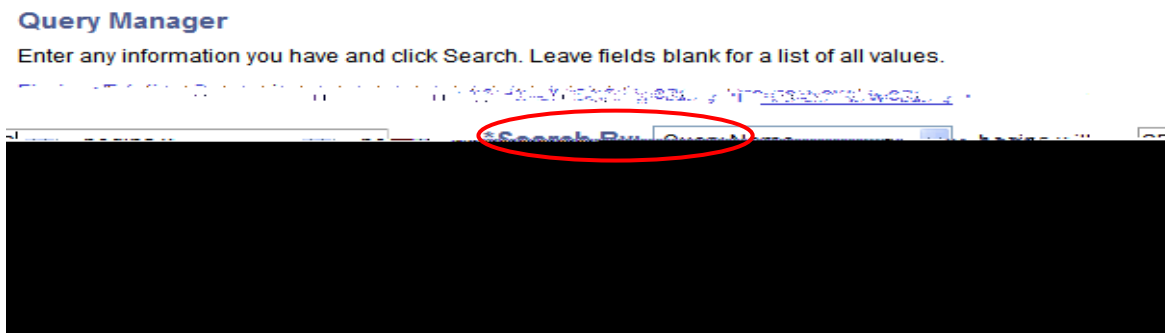
II – Using the Query Tool:

This section will cover:

- Searching for queries
- Running queries
 - Exporting results to Microsoft Excel or CSV
- Viewing/Editing Existing Queries
 - Using existing queries to create your own queries

Searching for an Existing Query:

1. To view/find an existing query, type your search criteria in the text box, as shown below. In this **example**, we are trying to find queries in which the name **begins** with “SES”.



2. To change how you search for an existing query, you can change the “**Search By**” options by selecting a different value in the dropdown list as show below.



3. For even more search options you may click on the blue **Advanced Search** link shown below.

Query Manager

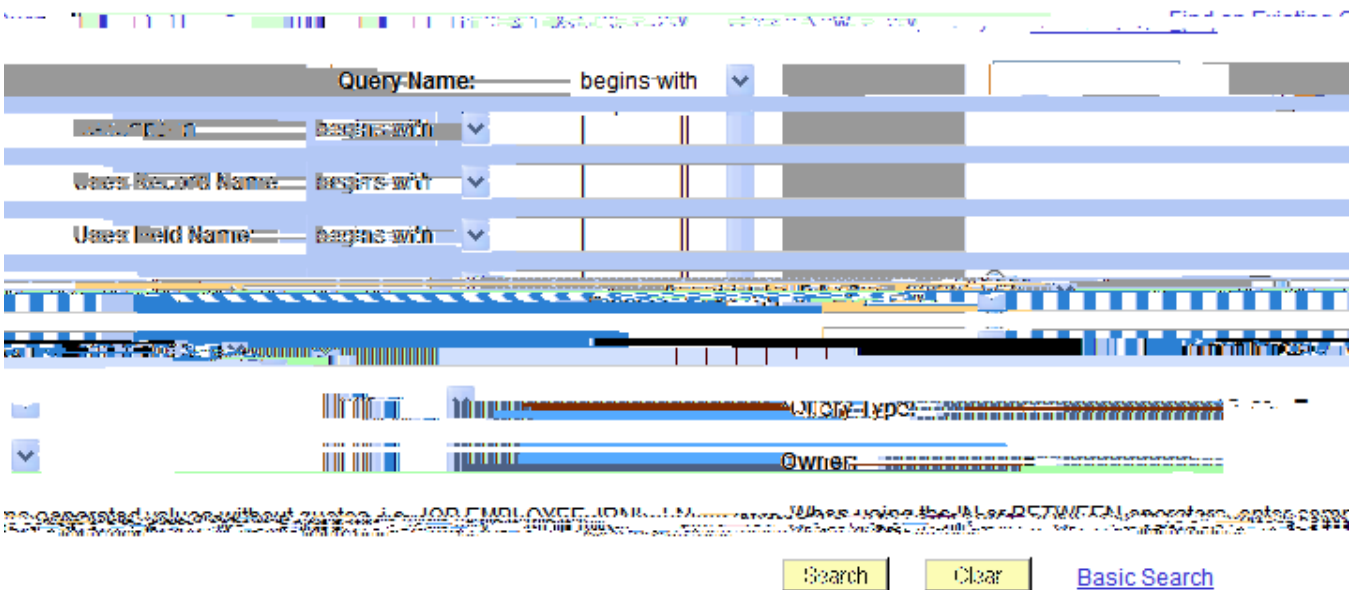
Enter any information you have and click Search. Leave fields blank for a list of all values.



4. The search options shown below will allow you to specify more exact search parameters.

Query Manager

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



Running an Existing Query:

There are two ways to run a query:

- From the Query Search Results
- From Query Manager

Query Search Results

After you have successfully searched and found the query you are interested in, you can run the query by clicking on the blue **HTML** link under the “**Run to HTML**” heading. (See below) This will open up a new window and allow you view the query results in your web browser. Note: If there are run-time prompts associated with the query, they will be shown in the top-left corner of the new window. Prompts will be covered later on in this document.

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: begins with
 [Advanced Search](#)

Search Results

View:

*Action:

Folder	Private	Edit	HTML	Excel	Schedule	Run
<input type="checkbox"/> SES_LOCAL_ADDRESSES	Local					

- a) To download the results to a Microsoft **Excel** spreadsheet, left-click on the **Excel Spreadsheet** link shown below. You will be prompted to open or save the file. You can also create a **comma-separated** file (or CSV) by clicking on the **CSV Text File** link.

Download results to:

Acad	Address	City	State	Zip	Phone	Ext	Wdrow	Prim	Str						
Courtney a	1111 Wildcat Ave	Residence Hall #2	Evanston	IL	602012980	06C40-BSSP	2	XXXXXX	4290	NWD	UGRD	06SPC	30	F	Wilson, Amand
Daniel Alexander	2222 Purple Lane	Residence Hall #2	Evanston	IL	602015093	06P05-BSSP	3	XXXXXX	4290	NWD	UGRD	06SPC	20	F	Wilson

- b) A query can also be run to Microsoft **Excel** spreadsheet directly from the search results screen as shown below. Left-click on the blue **Excel** link under the “**Run to Excel**” heading. (See below) You will be prompted to open or save the file.

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](#)

Search Results

View:

*Folder

*Action:

The screenshot shows a table of search results. The table has columns for 'Folder', 'Query Name', and 'Action'. The first row is 'Addresses' with folder 'Private'. The second row is 'SES_LOCAL_ADDRESSES' with folder 'Local'. Under the 'Action' column for the second row, there are links: 'Edit', 'HTML', 'Excel', and 'Schedule'. The 'Excel' link is circled in red.

Query Manager

The query can also be run from inside Query Manager. Select the blue **Edit** link as shown below

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](#)

Search Results

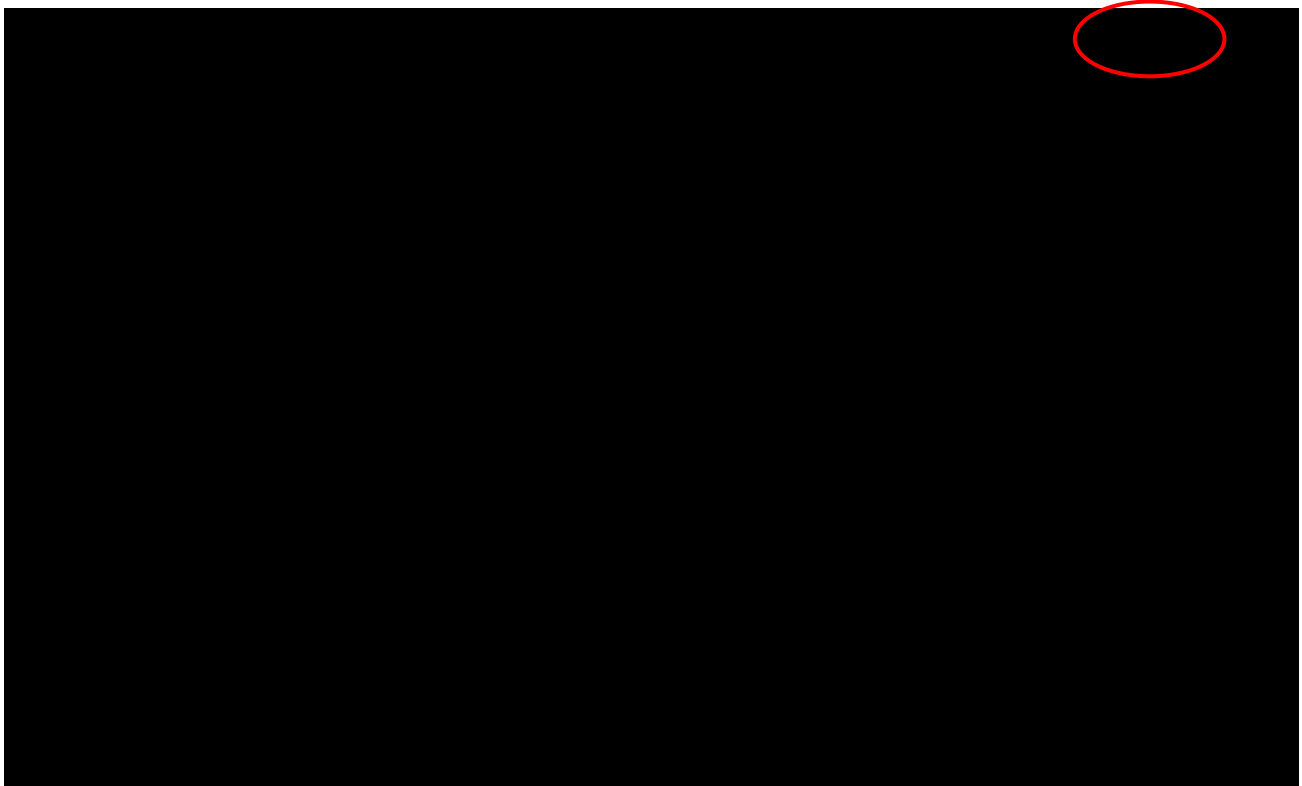
View:

*Folder

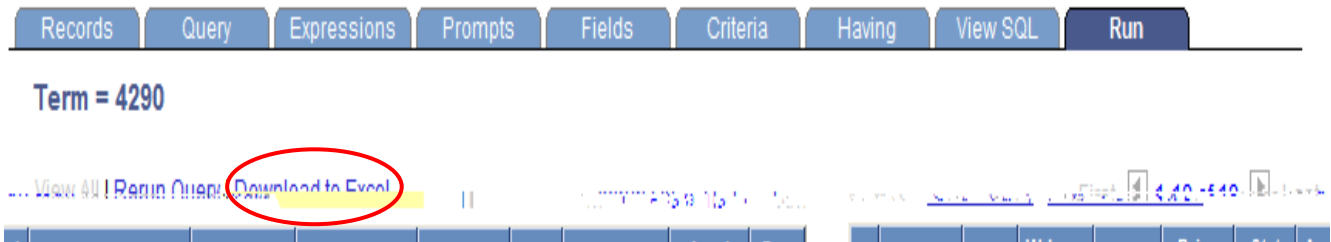
*Action:

The screenshot shows a table of search results, identical to the one above. The 'Edit' link under the 'Action' column for the 'SES_LOCAL_ADDRESSES' row is circled in red.

Select the **Run** tab as shown below. If there are prompts, they will display on the top left-hand corner. The results of the query will be displayed in the same window.



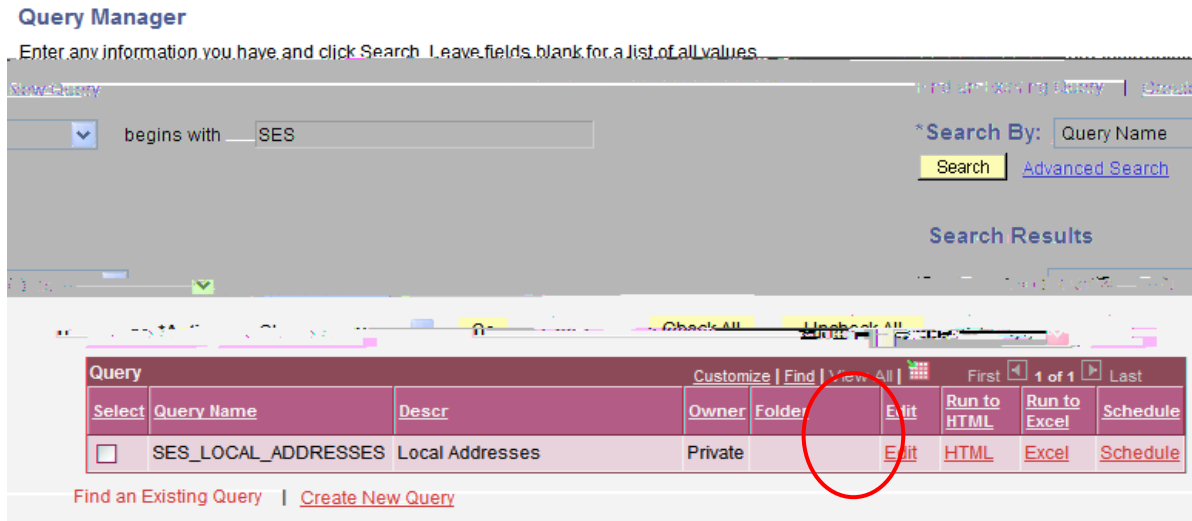
To Export the query results to Excel while in Query Manager, you will need to **left-click on the blue “Download to Excel” link below, while holding down the CTRL button on your keyboard.** Continue to hold the CTRL button as you choose to either open or save your file.



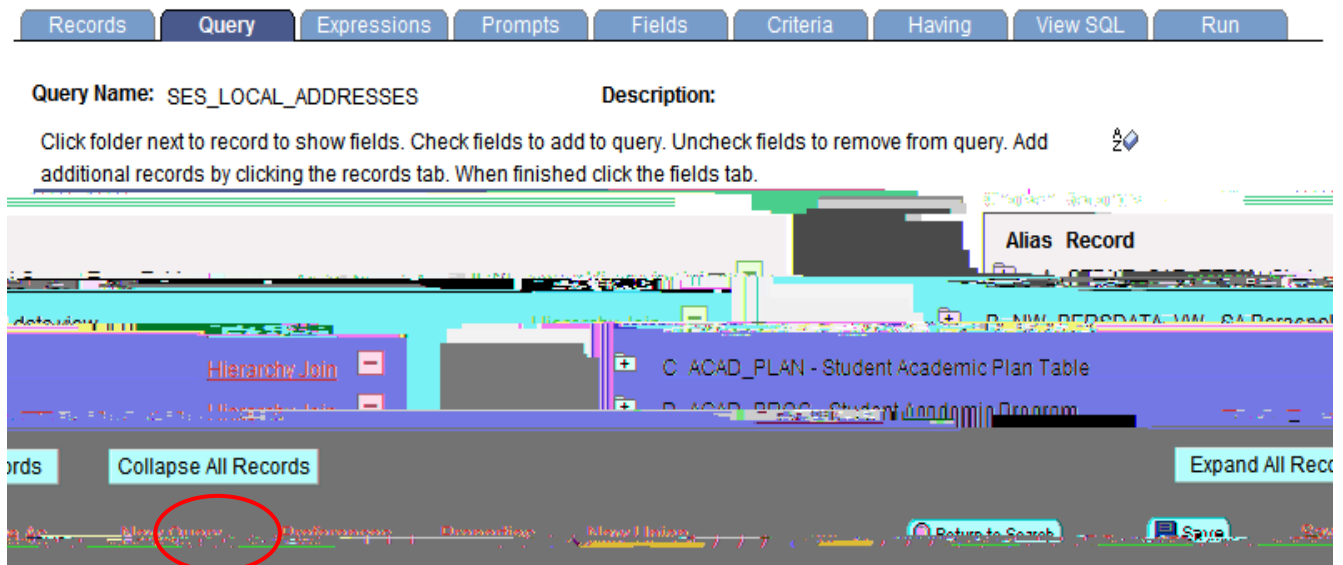
Note: To return to the Query Manager Search page, click on the [Return to Search](#) button or use your left-hand menu to navigate to Reporting Tools à Query à Query Manager.

Viewing/Editing an Existing Query:

After you have successfully searched and found the query you are interested in viewing, you can see the records, fields, and criteria used by selecting the blue **Edit** link as shown below. The query will open up in Query Manager and you will be able to view all of the tabs that contain data relating to the setup of the query.



If you would like to modify a public query, create a copy of the query by clicking on the Save As link shown below. Reasons for editing a public query may include, but are not limited to, adding/removing a field, changing criteria, etc.



Saving Queries

Queries can be saved from any Query Manager page (except for the Run page) by clicking either the Save button or the Save As link.

You must enter some basic information about the query before the system allows you to save it. A query can be saved at any time after you have selected one record and at least one field for it.

The screenshot shows a web application interface with a 'Query Properties' dialog box. The dialog box is titled 'Query Properties' and contains the following information:

- Last Updated Date/Time: 01/21/2008 2:51:17PM
- Last Update User ID: SESJW0

There are 'OK' and 'Cancel' buttons at the bottom of the dialog box. The background shows a table with columns for 'Query Name', 'Description', and 'Folder'. The 'Query Name' column contains the text 'SES LOCAL ADDRESSES'. The 'Description' column contains the text 'UCED Local Addresses by Term'. The 'Folder' column contains the text 'User'.

Query: This field is for the query name. If public, please append your SES ID or your department abbreviation as a prefix. No spaces or special characters are allowed except an underscore (30 Character Limit)

Description: Provide a short meaningful description (30 Character Limit)

Folder: N/A

Query Type: Please select "User" in this field

Owner: Choose Public or Private OwTdt8hooose-8S63aos -0.0whetheave waTJothsave acr ss depar27.19 Td5 Td(

Deleting Queries

To delete a query or queries, search for the appropriate query using the page shown below. (Please only delete queries that you have created)

The screenshot shows a web interface for managing queries. At the top, there are links for "Create New Query" and "Find an Existing Query". A search form includes a dropdown for "Query Name", a text input for "begins with" containing "SES", and a "Search" button. Below the search form, there are controls for "Folders" and "Folder View". A table of search results is displayed with columns for "Select", "Query Name", and "Description". The first row, "SES_CLASS_ROSTER", has its "Select" checkbox checked. Below the table, there is an "Action" dropdown menu set to "-- Choose --" and a "Go" button. At the bottom, there are links for "Find an Existing Query" and "Create New Query".

Select	Query Name	Description
<input checked="" type="checkbox"/>	SES_CLASS_ROSTER	cr
<input type="checkbox"/>	SES_ENRL_REQUESTS	
<input type="checkbox"/>	SES_LCL_ADDRESSES	For Document
<input type="checkbox"/>	SES_LOCAL_ADDRESSES	UGRD Local A

Once you have found the query you wish to delete, place a check in the box to the left of the query name and choose **Delete Selected** from the **Action** drop down list. (Shown below)

A close-up of the "Action" dropdown menu. The menu is open, showing a list of options. The option "Delete Selected" is highlighted in blue, indicating it is the selected action.

Once you have done this, select the **Go** button. The following page will appear.

Confirm the permanent deletion of all selected queries? (139,191)


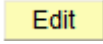

Select "Yes"

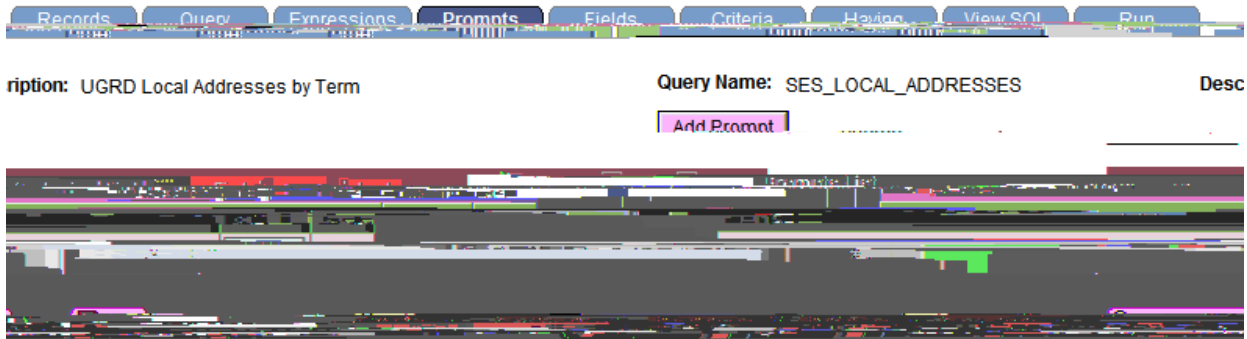
Records Tab

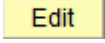
t>

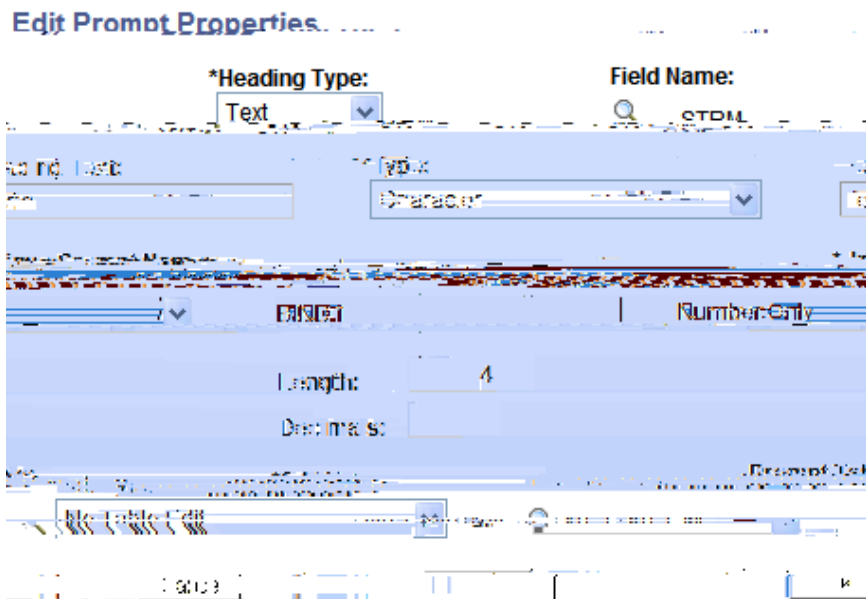
Prompts Tab


From the **Prompts Tab**, you can create or edit prompts that are executed when the query is run. The Prompt or Run-Time Prompt, as it is sometimes called, allows you to select a specific value each time you run your query. For instance, in the following example, we can create a prompt that will allow us to change the term we want to use each time the query is run.

- To create a new prompt, select the  button below
- To edit a Prompt, select the  button below
- To delete a prompt click on the  symbol below, to the right of the Edit button

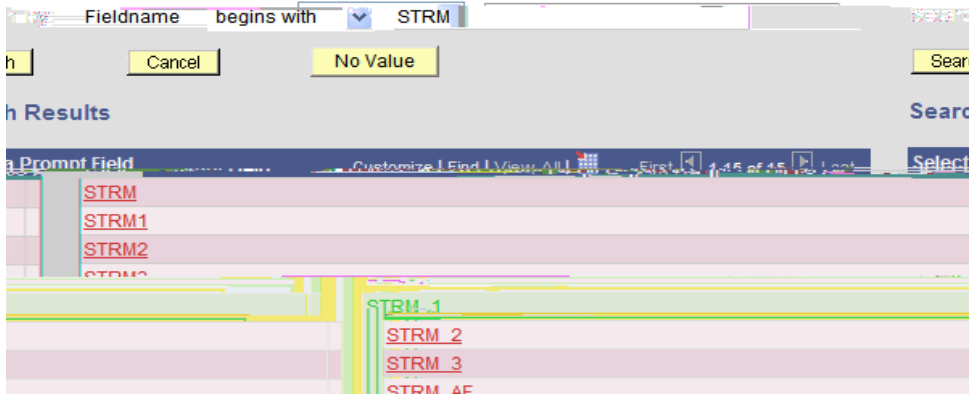


After you have selected the  button, the following page will open.



You will need to click on the  magnifying glass under the **Field Name** heading to search for the field you want to use in the prompt. Once you have found the field, select it by clicking on the field name, which is shown as a blue hyperlink. (Below)

Select a Prompt Field

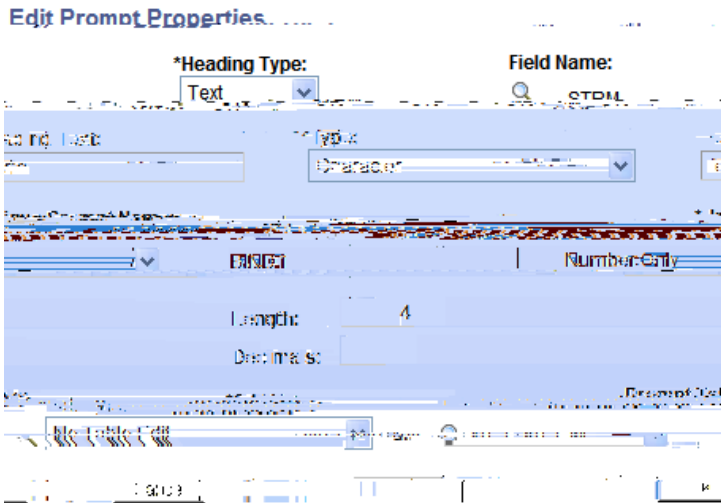


Once you have selected the field you want to use, PS Query will look to the **Record (table) definition for information about this field and will automatically fill out the rest of the dialog box based on its (the field) properties.**

Type - Indicates the type of the field.

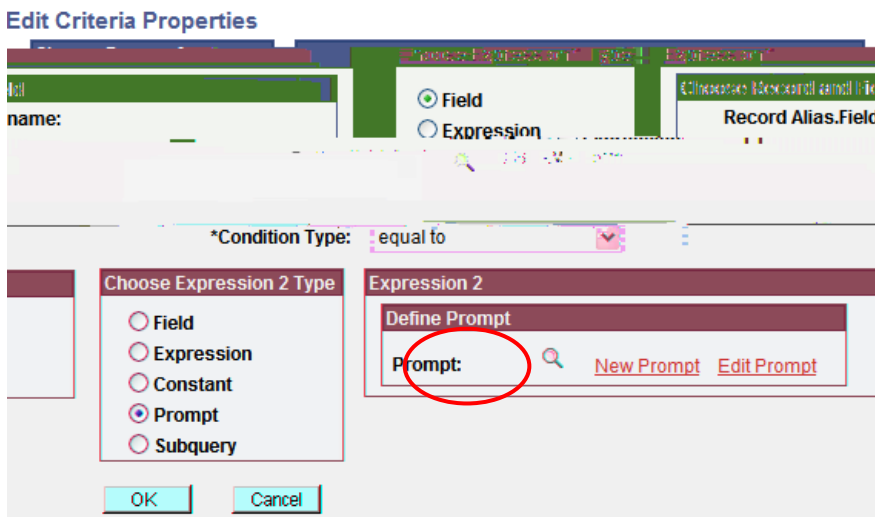
Format - Specifies the field format. Several formats are available, including Name, Phone, Social Security Number, and Zip Code **are available**

Length - beCodiw1h-
Format -



To make the Prompt usable in the query, you will need to link it to a criterion.

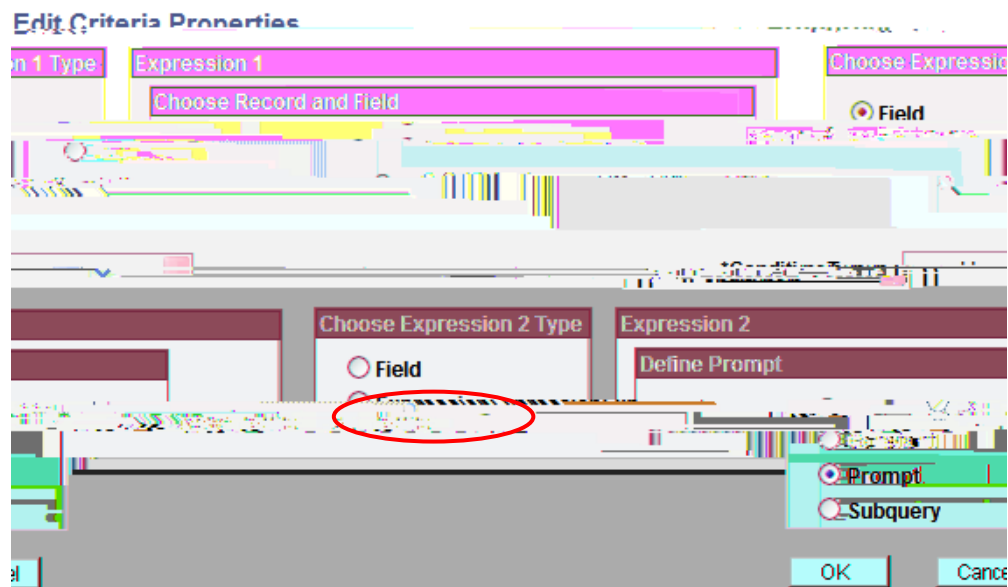
Click on the **Add Criteria** button on the **Criteria Tab** and the following page will open. In our example we are prompting for the **STRM** (Term) value.



Choose the **STRM** (Term) field for Expression 1 by using the lookup. Next you will want to choose the appropriate **Condition Type**. Finally, you will want to add the prompt that you created by using the lookup shown above. (For more detail on Editing Criteria Properties, see the Criteria section of this document)

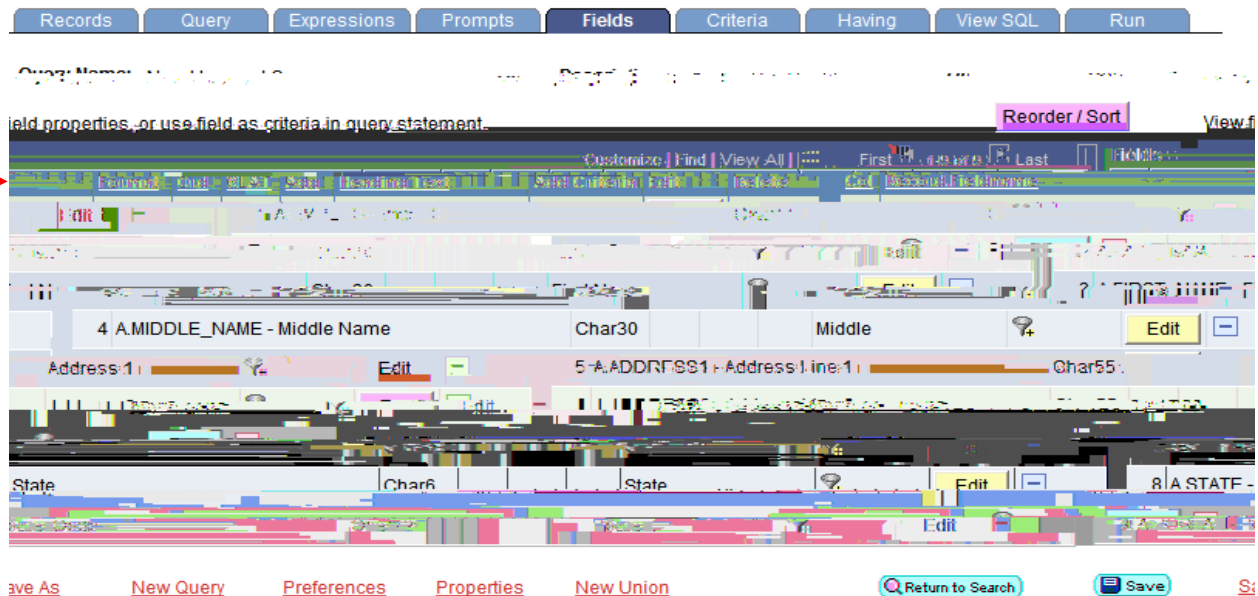
Once you have edited the Criteria to incorporate your prompt, it should look like the screenshot below. The number displayed in the Expression 2 text box (below) is the unique number given to your prompt in the case that your query utilizes multiple prompts.

Once satisfied, click OK to return to the Criteria page.



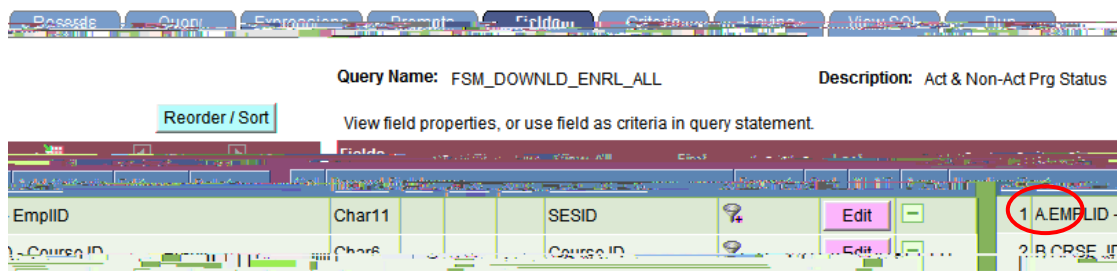
Fields Tab

The **Fields Tab** allows the user to view, edit, and format the fields (columns) that are used in the query.



- **Col** – The order in which the fields are displayed when the query is run. (left to right)
- **Record.Fieldname** – Record Alias (A, B, C, etc.) & Field Name separated by a period. The Record Alias refers to the records as they appear on the Records tab.
- **Format** – Field type and length
- **Ord** – Shows if the query results will be sorted and in what order (1, 2, etc.)
- **XLAT** – Specifies the translate value that you want to appear in the query results: N (none), S (short), or L (long). The table you are querying may include fields that use the translate table. If so, the field itself contains a short code of some kind, for which the Translate table provides a set of corresponding values.
- **Agg** – Will display if field is an aggregate (Sum, Count, Min, Max, Avg)
- **Heading Text** - The column name displayed in the query output.

To remove a field from the output of the query, simply select the **Minus** button under the **Delete** heading as shown below.



Sorting & Reordering Columns

To **Sort** and/or **Order**

Criteria Tab

View SQL Tab

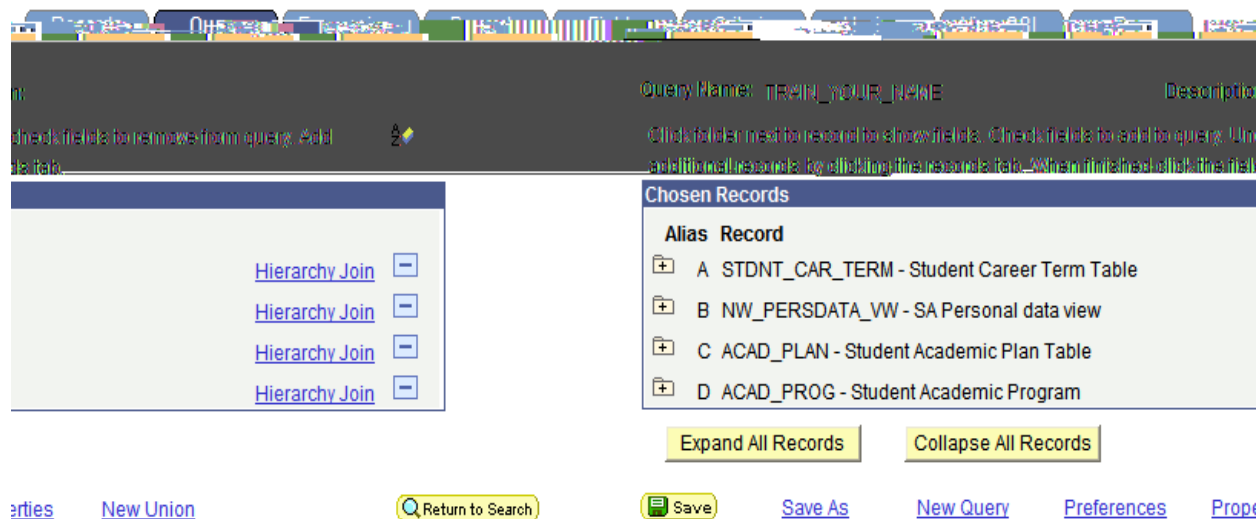
The View SQL tab displays the SQL statement created as you assemble your query. PS Query uses the SQL (Structured Query Language) syntax to generate the query. Thisew SQing & (7)05 0 7.25518.817 viewu a-onl

III – Exercise: Editing an Existing Query:

Editing an existing Query

Open the following Query:

TRAIN_YOUR_NAME (Where YOUR_NAME is actually your name)



Remove the following fields from the Query:

-

- Last Name, First Name

Edit/Remove the following Criterion:

- **Last Name** – Change to “Jones”
- **Career** – Change to “TGS”
- **Academic Load** – Remove this criteria

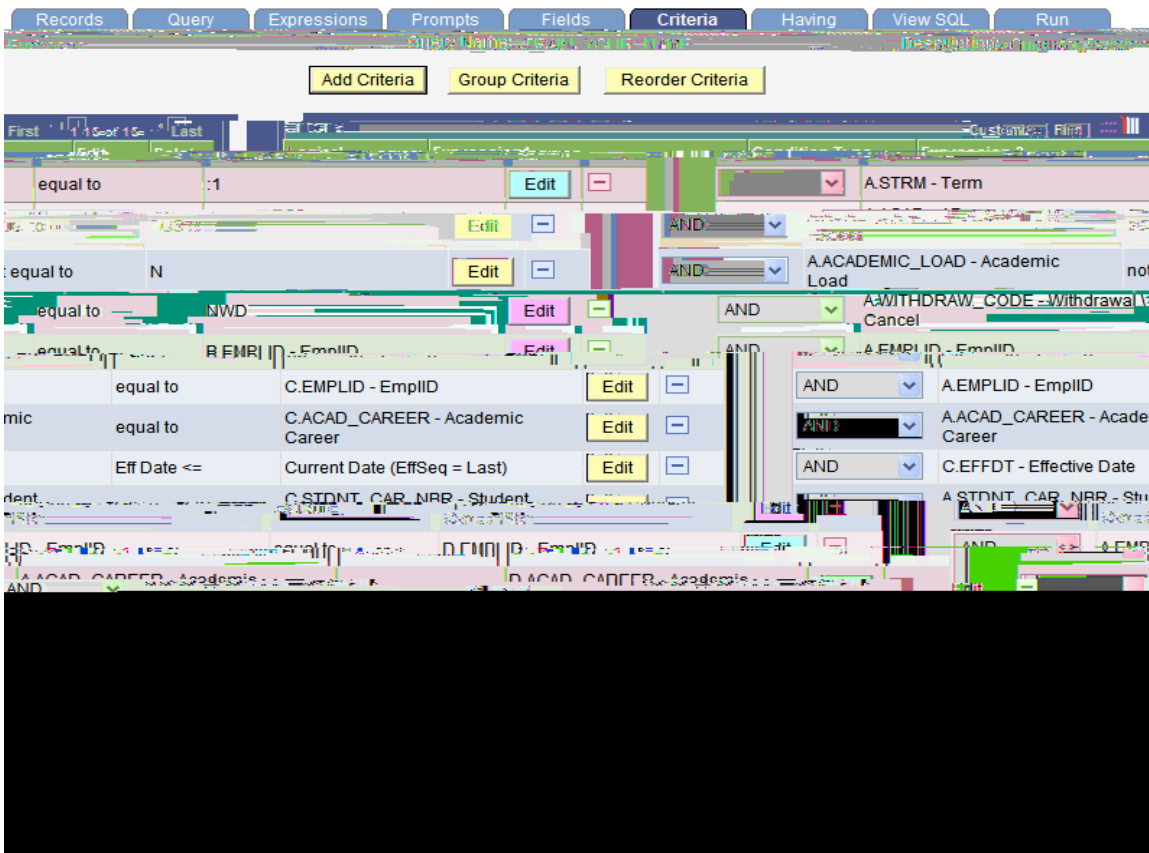
Edit/Save Query Properties

- Make sure your query is Private
- Be sure to provide meaningful text in the Description and Query Definition fields

Run Your Query and see if it works!

After you have finished, your Fields and Criteria tabs should match the screen shots below.





IV – Helpful Hints & Best Practices:

- **Build your queries piecemeal** - If you are building a query with multiple criteria, pull them in one at a time, and rerun the query after each criterion is added. Establish temporary criteria in order to limit your result set (Ex: Set Criteria for Emplid Range or a single Last Name). This allows you to control the output and identify whether the query is working correctly before you run it against your entire target population.
- **Don't re-invent the wheel** – Take advantage of what others have already done. There are several experienced query writers who have written queries that can be used by simply performing a “**Save As**” and renaming it for your own use.
- **Columns/Fields** - Only pull the columns into the query that you need. Having your query return and display unnecessary columns is wasting system resources. Also, not all tables and fields are populated.
- **Sorting** – If the query has a large result set, avoid sorts when running the query within the browser. If possible, do your sorting in Microsoft Excel. Sorting at run-time in PS Query can have a negative impact upon performance.
- **Functions** - Use functions in moderation, and try to only use the aggregate functions that are built into PS Query.
-