



- Marie Coleman - 04:29 PM
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SCHRUG Alliance 2016

Session Title:	PS Basic Query Writing
Session Number:	5143
Track:	General Interest Track
Session Type:	Pre Conference Workshop
Room Assignment:	Space City - Rm 214 => Thu, Jul 28, 2016 (01:00 PM - 02:30 PM)
Initial Submission:	May 06, 2016 05:44 AM America/Central
Status:	Approved and Accepted
Session Submitter:	Marie Coleman
Primary Presenter:	Marie Coleman University of Houston System Application Lead You are currently missing the following information from your user profile: Profile Picture . Please click here to update your profile information.
Co-Presenter:	[Unassigned]
Co-Presenter 2:	[Unassigned]

Vendors not allowed to download files?:	No
Last Update:	May 23, 2016 10:04 AM America/Central
Short Details:	Attendees will be exposed to the concepts of query writing and the functionality offered by the PeopleSoft Query toolset in developing basic queries. The PS Query toolset provides the easiest mechanism to create and generate simple reports from PeopleSoft.
Details:	<p>This workshop guides users in learning the concepts and procedures related to the PeopleSoft Query toolset. The PS Query toolset provides the easiest mechanism to create and generate simple reports from PeopleSoft. While PS Queries cannot be used to produce highly formatted and graphical reports, it is very effective in extracting day-to-day inquiry queries that are of interest to employees, managers and administrators. Data extracted through the PS Query tool is also frequently used as the data source in other processes such as Pop-Select.</p> <p>Topics covered in the workshop include:</p> <ul style="list-style-type: none"> - Understand the PeopleSoft Query tool and how to navigate it - Query Viewer vs Query Manager - Output Formats - Global Search Features - Searching for Queries - Running Queries - Downloading Queries - Scheduling Queries - Favorite Queries - Report Manager - General Query Methodology - Understand PeopleSoft Query Structural Process Flow - Query Manager Design Pages and Page Links - How to develop simple queries - Selecting data from a single table - Specify the column order - Specify the sort order - Specify criteria for retrieving data - Specify query properties
Additional Notes:	
Session Length:	Workshop (90-120 minutes)

SCHRUG Alliance 2016

PEOPLESOFT BASIC QUERY WRITING

Session 5143

July 28, 2016

PS Basic Query Writing

- Fundamental concepts for simple data extractions in PeopleSoft Query Manager.

Your Presenter:

- Marie Coleman

Application Lead, University of Houston System

8 years PeopleSoft experience in Higher Education

Overview

- Attendees will be exposed to the concepts of query writing and the functionality offered by the PeopleSoft Query toolset in developing basic queries. The PS Query toolset provides non-technical/functional users the easiest mechanism to create and generate simple data reports from PeopleSoft.

Agenda/Contents

- Query Viewer vs Query Manager
- Searching, Running, Downloading, and Favorite Queries
- Scheduling Queries and Report Manager
- General Query Methodology and PS Query Structural Process Flow
- Navigating Query Manager
- Developing a Simple Query
 - Selecting data from a single table, Specifying column order, Specifying data sort order, Specifying criteria for retrieving a dataset

UNIVERSITY OF HOUSTON SYSTEM

- ❖ Established in 1927
- ❖ Serving 66,000~ students
- ❖ Staffed by 7,000~ employees
- ❖ UH System institutions:
 - ❖ UH Central
 - ❖ UH Clear Lake
 - ❖ UH Victoria
 - ❖ UH Downtown (conversion from Banner to PeopleSoft targeted for Fall 2018)



UH System & Oracle

Campus Solutions

- ❖ Application v. 9.0; Bundle 41
- ❖ PeopleTools v. 8.54

HRMS

- ❖ Application v. 9.2
- ❖ PeopleTools v. 8.54

Finance

- ❖ Application v. 9.1
- ❖ PeopleTools v. 8.54

Oracle Database 11g

Learning Objectives

- Learn the basics of query writing methodology
- Become familiar with the PS Query tool, its structural process flow, and how to navigate it
- Understand the fundamental functionality offered by the PS Query tool and know how to successfully apply the mechanics of writing a simple query in PS for any basic data extraction need

PeopleSoft Query Writing: Basic

Query Viewer vs Query Manager

Query Viewer vs Query Manager

- Within its toolset, PeopleSoft offers the components Query Viewer and Query Manager for accessing queries. Query Viewer is a read-only version of Query Manager.

Functionality	Available in Query Viewer	Available in Query Manager
✓ Search for a query (basic and advanced searches)	Yes	Yes
✓ Run/Execute queries	Yes	Yes
✓ Download query results	Yes	Yes
✓ Schedule a query	Yes	Yes
✓ Create/Edit queries	No	Yes

Query Viewer vs Query Manager

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

UHS

Search

Advanced Search

Search Results Too many items met your search criteria. Only the first 300 items displayed.

*Folder View -- All Folders --

Check All

Uncheck All

*Action -- Choose --

Go

Query

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References
<input type="checkbox"/>	UHSFAQRY023_WITH_AIDYEAR_2014	ID award for 3C	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	UHSFAQRY023_WITH_AID_SUM13_JMT	ID award for 3C	Public		Edit	HTML	Excel	XML	Schedule	Lookup References

Query Manager allows creation and editing of queries...

Query Viewer

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

*Search By Query Name

begins with

UHS

Search

Advanced Search

Search Results

Too many items met your search criteria. Only the first 300 items displayed.

*Folder View -- All Folders --

Query

Query Name	Description	Owner	Folder		Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
UHSFAQRY023_WITH_AIDYEAR_2014	ID award for 3C	Public			HTML	Excel	XML	Schedule	Lookup References	Favorite
UHSFAQRY023_WITH_AID_SUM13_JMT	ID award for 3C	Public			HTML	Excel	XML	Schedule	Lookup References	Favorite

PeopleSoft Query Writing: Basic

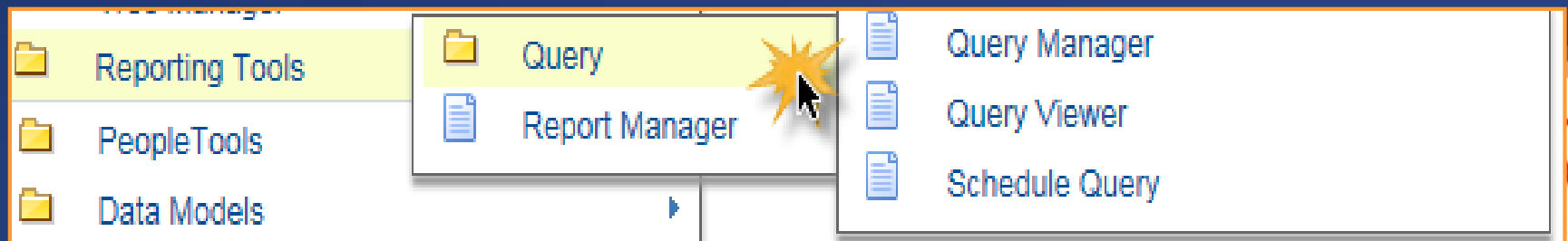
Searching, Running, Downloading, and Favorite Queries

Searching for Queries

- Both the Query Manager page and Query Viewer page enable a user to search for and run existing queries.
- There are multiple options available for users to search queries; the most common are by query name, description, folder name, and owner (public vs private). In addition, you can find a query if you know a record or field used by the existing query.

Searching for Queries

- Both the Query Manager page and Query Viewer page enable a user to search for and run existing queries.
- Navigating to the components:
 - To get to Query Manager, click Main Menu > Reporting Tools > Query > Query Manager
 - To get to Query Viewer, click Main Menu > Reporting Tools > Query > Query Viewer



Searching for Queries

- Queries can be searched using the following Search By parameters: Access Group Name, Description, Folder Name, Owner, Query Name, Type, Uses Field Name, and Uses Record Name.

*Search By begins with

▼ My Favorite Queries

Query Name	Owner	Folder	Edit	Run to HTML	Personalization
------------	-------	--------	------	-------------	-----------------

Searching for Queries

- Both basic searches and advanced searches can be performed.
 - The Basic Search allows you to search using the “begins with” condition.
 - The Advanced Search allows you to perform a progressively narrower search by using multiple search criteria and selecting from a broad choice of conditions.
- **Operators** and **Wildcards** can be used to facilitate searching for queries.

Searching for Queries

- Using **Operators**

- When performing an Advanced Search, you can use a variety of Operators to narrow your searches.
- A comma is used to separate parameter search values when using conditions **Between** and **In**.

Searching for Queries

- Using **Operators**

- You can use an operator for more than one field to make your search even more specific.
- For example, you could narrow your search for queries where **Folder Name = UHIR** and where the **Query Name** contains **CLASS**.

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

Search Clear [Basic Search](#)

Search Results

*Folder View -- All Folders --

Check All Uncheck All *Action -- Choose -- Go

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel
<input type="checkbox"/>	UHM_IR_CLASS_INFO_SUBJ_SEM	Provides Class info by subject	Public	UHIR	Edit	HTML	Excel

Searching for Queries

- Using Operators

- *Example Variations Using Search Operators:*

Search Operator	Operator Description	Sample Input Parameter	Sample Output Values Retrieved
begins with	Begins with value	"Smith"	"Smith, Smithee, Smithwick"
contains	Contains value	"Smith"	"Goldsmith, Smith, Smithee, Smithwick"
=	Equals value	"Smith"	"Smith"
not =	is Not Equal to value	"Smith"	All possible values excluding "Smith"
<	is Less Than; Comes Before	"Smith"	"Albert, Jones, Goldsmith, Nordstrom, Rainier"
<=	is Less Than or Equal to	"Smith"	"Albert, Jones, Goldsmith, Nordstrom, Rainier, Smith"
>	is Greater Than, Comes After	"Smith"	"Smithee, Smithwick, Turner, Urtz, Young"
>=	is Greater Than or Equal to	"Smith"	"Smith, Smithee, Smithwick, Turner, Urtz, Young"
between	is Between values	"Rainier" and "Smithwick"	"Rainier, Smith, Smithee, Smithwick"
in	is Included in the following list	"Jones, Smith, White"	"Jones, Smith, White"

Searching for Queries

- Using **Wildcards**
 - Wildcard characters can be used to help find data
 - **Note:** wildcard characters only work with the “begins with” and “contains” operators

Searching for Queries

- Using **Wildcards**

- PeopleSoft Query recognizes the **% (percent)** and **_ (underscore)** wildcards
 - **% (percent)** matches any string of zero or more characters. For example, 'C%' matches any string starting with C, including C alone
 - **_ (underscore)** matches any single character. For example, '_ones' matches any five-character string ending with 'ones', such as Jones or Cones

Searching for Queries

- Using **Wildcards**

- To use one of the wildcard characters as a literal character (for example, to include a % in your string), precede the character with a **\ (backward slash)** (for example, '\%'). The backward slash tells PeopleSoft to not treat the next character as a wildcard.

Query Viewer

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

Query Name	begins with	%TSI
Description	contains	\%
Uses Record Name	begins with	
Uses Field Name	begins with	
Access Group Name	begins with	
Folder Name	begins with	
Owner	=	

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

[Basic Search](#)

Search Results

*Folder View -- All Folders --

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel
CS_UHV_AD_TSI	5%-10% of accepted TSI scores	Public		HTML	Excel
UHV_AD_TSI	5%-10% of accepted TSI scores	Public		HTML	Excel

Searching for Queries

- To perform a **Basic Search**, simply select an option from the **Search By** drop down list and then type in the text string to be searched. If you do not know the entire string (such as whole query name) simply enter the beginning characters of the text string as a **partial string** search; **wildcards** can be used in generating the search.

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

Search Results Too many items met your search criteria. Only the first 300 items displayed.

*Folder View

*Action

Query

Personalize | Find | View 100 | First 31-60 of 300 Last

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References
<input type="checkbox"/>	UHSFAQRY023_WITH_AIDYEAR_2014	ID award for 3C	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	UHSFAQRY023_WITH_AID_SUM13_JMT	ID award for 3C	Public		Edit	HTML	Excel	XML	Schedule	Lookup References

Searching for Queries

- 'Query Manager' Search Page **Actions**
 - PeopleSoft enables users to perform several query related actions by simply clicking on the Select checkbox next to one-to-many queries and selecting an option from the Action drop down list and clicking

The screenshot displays the 'Query Manager' interface. At the top, there is a search section with a 'Search By' dropdown set to 'Query Name' and a search box containing 'UHIR'. Below this is a 'Search Results' section with a 'Folder View' dropdown set to '-- All Folders --'. A table of search results is shown, with columns for 'Select', 'Query Name', 'Descr', and several action links. A red box highlights the 'Action' dropdown menu, which is open and shows options like 'Add to Favorites', 'Copy to User', 'Delete Selected', 'Move to Folder', and 'Rename Selected'. A red callout bubble points to this menu with the text 'Actions that can be performed on a query'. A 'Go' button is visible next to the 'Action' dropdown.

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 UHIR

Search Advanced Search

Search Results

*Folder View -- All Folders --

Check All Uncheck All

Select	Query Name	Descr	Action	Run to HTML	Run to Excel	Run to XML	Schedule
<input checked="" type="checkbox"/>	UHIR_CLASS_TBL_PHARM1780	Pharmacy Class Listing Team 17	<input type="button" value="Go"/>	HTML	Excel	XML	Schedule
<input type="checkbox"/>	UHIR_CLASS_TBL_PHARM1790	Pharmacy Class Listing Team 90		HTML	Excel	XML	Schedule
<input checked="" type="checkbox"/>	UHIR_CLASS_TBL_SPACEUTIL	Space Utilization By Subject		HTML	Excel	XML	Schedule
<input type="checkbox"/>	UHIR_CLASS_TBL_SPACEUTIL_COA	Space Utilization By Subject		HTML	Excel	XML	Schedule
<input type="checkbox"/>	UHIR_CLASS_TBL_SPACEUTIL_COE	Space Utilization By Subject		HTML	Excel	XML	Schedule

Searching for Queries

- 'Query Manager' Search Page **Actions**

<u>Action</u>	<u>How Used</u>
Add to Favorites	Adds the selected query to My Favorite Queries for easy access
Copy to User	Copies a private query to another user. You can copy only nonpublic queries to another user's list of queries. If the target user does not have permission to access all of the records in a copied query, that query does not appear in the target user's list of queries. When permission has been granted, the query appears in the list.
Delete Selected	Deletes the query.
Move to Folder	Organizing queries in folders can help you more easily access the queries. This action moves selected queries to a folder.
Rename Selected	Allows the user to rename the query.

Seeing it in Action...
Searching for Queries

Downloading Queries

- You can download your query to a Microsoft Excel spreadsheet, XML file, or CSV text file.
- If you download your query from the Run page, the query has a different default filename than if you download your query after clicking the HTML or Excel links. These default filenames are different because:
 - (a) using the Run page to run queries, queries are run using the application server, and
 - (b) using the HTML or Excel links, queries are run using a query service.

Downloading Queries

- To download your query results, select one of the following:
 - **Excel:** Click this link on the Query Manager or Query Viewer search results page
 - **Download to Excel:** Click this link on the Query Manager or Query Viewer Run page.
 - **Excel SpreadSheet:** This option is available after you have clicked the HTML link on the Query Manager or Query Viewer search results page. However, you can also click the Download to Excel or Excel links without downloading the query to HTML. You can configure your environment to open the Microsoft Excel file in a separate window or save it as a file on your local hard drive by modifying the File Type Option settings for Microsoft Excel Worksheets.

Downloading Queries

- To download your query results, select one of the following:
 - **CSV Text File:** This option is available after you have clicked the HTML link. If you click this option, the File Download page appears, at which point you can open the file in your browser or save it to disk.
 - **XML File:** This option is available from the Search page as well as Run page.

Downloading Queries

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](#)

Search Results

*Folder View

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
UHIR_MAJORS_ROSTER_BY_ECE_GRAD	Majors Roster of ECE MSDRs	Public	ADVISOR	HTML	Excel	XML	Schedule	Favorite
UHIR_MAJORS_ROSTER_BY_IE_GRAD	Majors Roster of INDE MSDRs	Public	ADVISOR	HTML	Excel	XML	Schedule	Favorite
UHIR_MAJORS_ROSTER_OFFICIAL	Majors Roster by College	Public	ADVISOR	HTML	Excel	XML	Schedule	Favorite

UHIR_ROSTER_BY_ACAD_PLAN - Majors Roster by College

Institution:

Acad Plan:

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File \(334 kb\)](#)

[View All](#)

ID	Name	EnrolledCurrent	Acad Plan

Records Query Expressions Prompts Fields Criteria Having View SQL Run

User = 0897289

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

OprID	Name	Email ID

Seeing it in Action...
Downloading Queries

PeopleSoft Query Writing: Basic

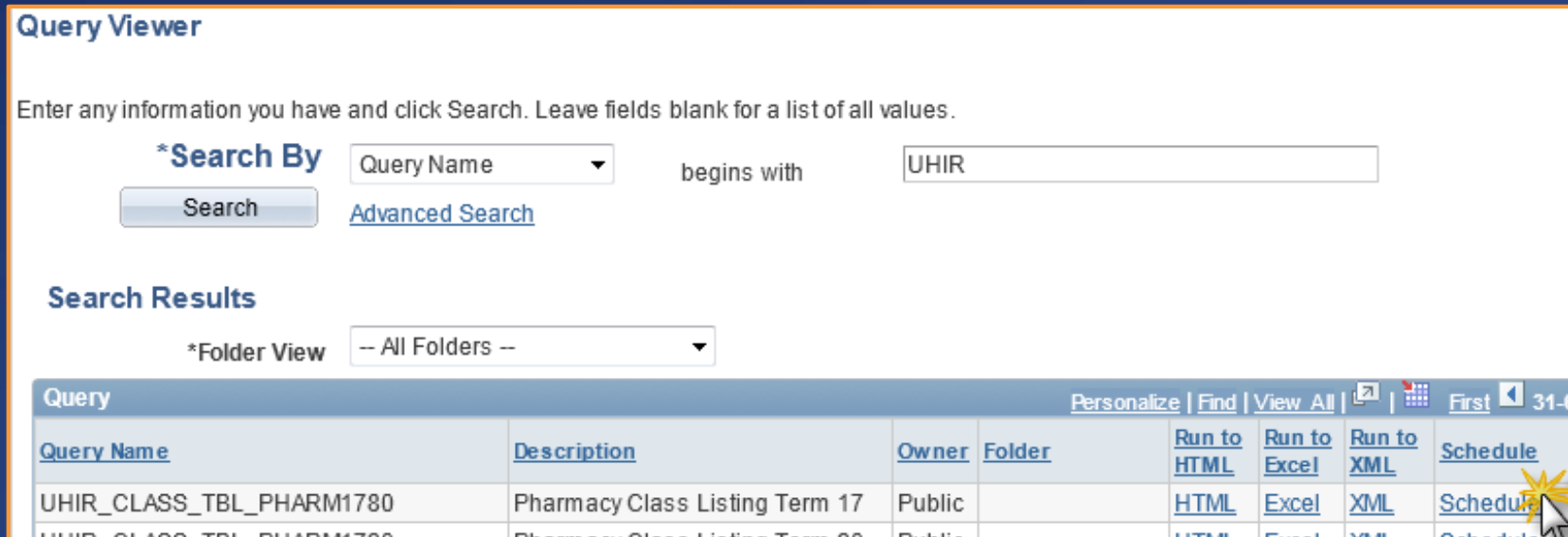
Scheduling Queries and Report Manager

Scheduling Queries

- Query Viewer and Query Manager interact with PeopleSoft **Process Scheduler** to enable you to schedule queries to run at a later time; or to schedule queries with large results to run over the server instead of the web client that has limits on the retrieval of large results
- You can schedule queries to **run at predefined times** or on **recurring schedules** (allowing the user to run the same query at regular intervals). The results of scheduled queries are retrieved in PeopleSoft **Report Manager** and/or **Process Monitor**

Scheduling Queries

- You can initiate scheduling of a query by clicking on the **Schedule link** from the Search Page of Query Viewer and Query Manager which takes you to the **Schedule Query page**; you can also initiate scheduling through navigation Main Menu > Reporting Tools > Query > Schedule Query



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](#)

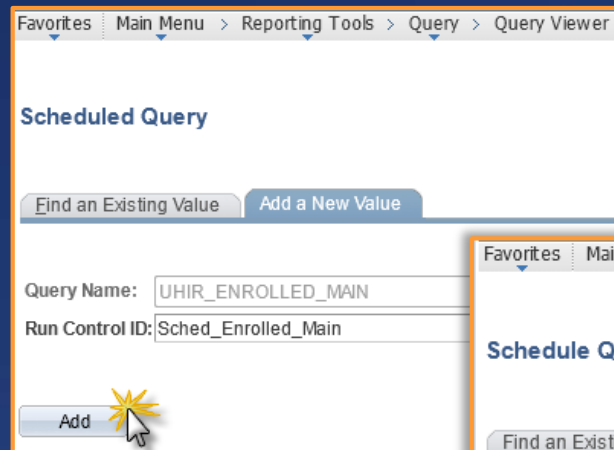
Search Results

*Folder View

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule
UHIR_CLASS_TBL_PHARM1780	Pharmacy Class Listing Term 17	Public		HTML	Excel	XML	Schedule
UHIR_CLASS_TBL_PHARM1780	Pharmacy Class Listing Term 17	Public		HTML	Excel	XML	Schedule

Scheduling Queries

- Queries are scheduled through submitting a **Process Request**. A process request enables you to submit a job or process to run. The Schedule Query page submits a process request and brings up the Process Request page, which enables you to specify such variables as where to run the process and in what format to generate the output based on a run control ID



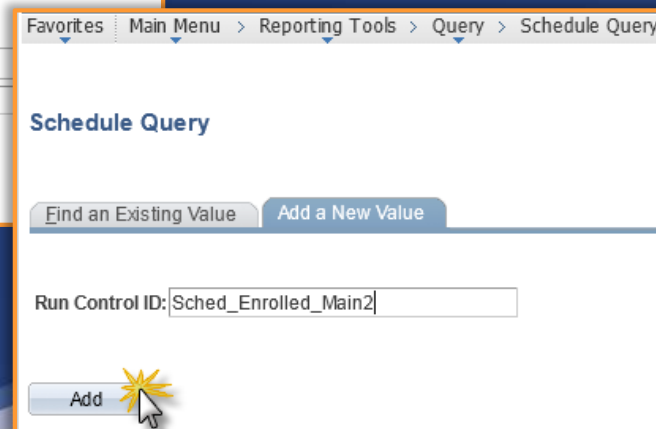
Favorites | Main Menu > Reporting Tools > Query > Query Viewer

Scheduled Query

Find an Existing Value | Add a New Value

Query Name: UHIR_ENROLLED_MAIN
Run Control ID: Sched_Enrolled_Main

Add



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

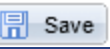

Schedule Query

Find an Existing Value | Add a New Value

Run Control ID: Sched_Enrolled_Main2

Add

Scheduling Queries

- If initiated from menu navigation **Schedule Query**, select the query for which you want to schedule; if initiated through **Query Viewer/ Manager** the query is already selected for you but you need to update the description field
- Update any prompt parameters by clicking on the Update Parameters link; Note: if the query does not have any prompts, the Update Parameters link does not appear
- To save changes and remain on the page, click the  Save button if initiated through menu navigation Schedule Query...click the  Apply button if initiated through Query Viewer/ Manager

Scheduling Queries

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

Schedule Query

Run Control ID: Sched_Enrolled_Main2 [Report Manager](#) [Process Monitor](#)

Query Name:

*Description:

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

Schedule Query

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

Query Name:

*Description:

Report Manager

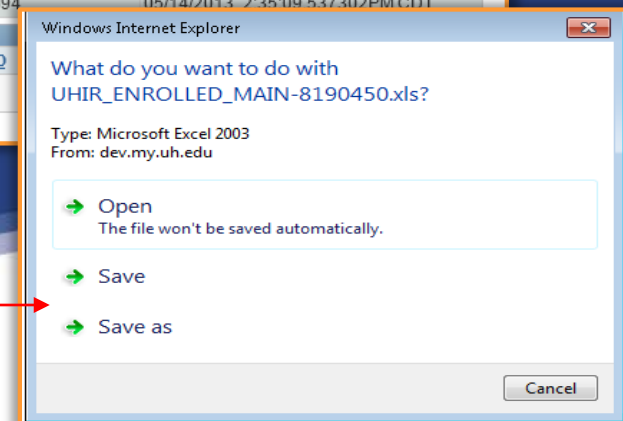
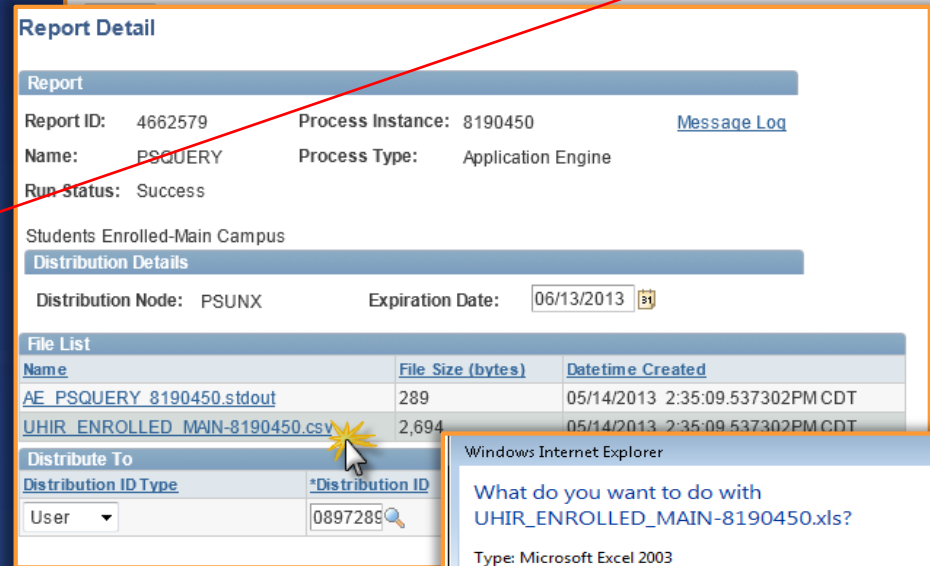
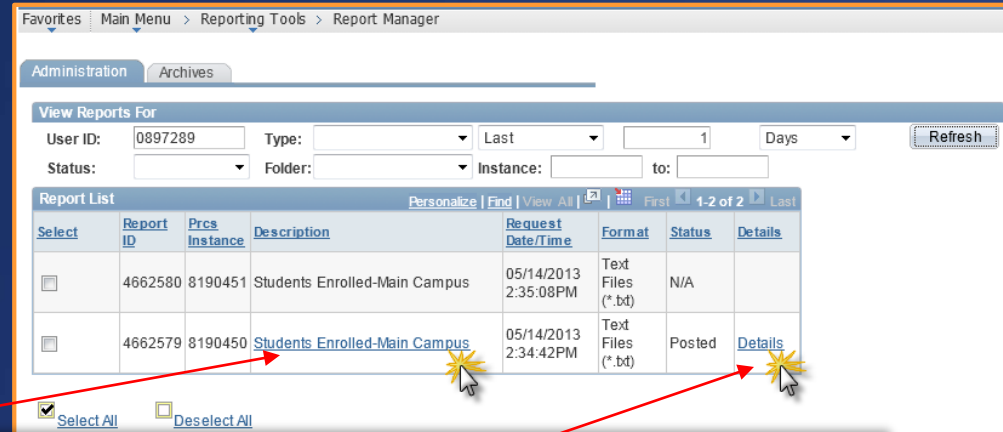
- The results of scheduled queries can be retrieved in PeopleSoft **Report Manager**. Report Manager is like your own personal inbox of reports and process output.
- To access the Report Manager navigate menu Reporting Tools > Report Manager, or click the **Report Manager link** on the Schedule Query page

Report Manager

- To run the report from the **Report Manager** page, click on the report item's **hyperlinked Description**.

- To run the report from the **Report Detail** subpage click on the **Details link** and then the **file output link**.

- You can then open the file or save it to a desired location.



Seeing it in Action...
Scheduling Queries and Report Manager

PeopleSoft Query Writing: Basic

General Query Methodology and PS Query Structural Process Flow

Query Methodology

- When creating queries, endeavor to follow a **methodology** similar to the following list:
 - Identify What Information is Really Needed
 - Determine Criteria Logic
 - Use Appropriate Records, Tables, and Fields, Column Ordering, Field Sorting
 - Perform Table Dumps to Learn Tables
 - Identification of Key Fields
 - Development of Criteria appropriate for the Table
 - Identify Example/Sample Data to get a feel for the data

Query Methodology

- When creating queries, endeavor to follow a **methodology** similar to the following list:
 - Map out Table/Record Joins that may be required
 - Identify what join type is needed
 - Inner/Standard Join
 - Outer Join
 - Run query after each new table join to compare what has changed – add/lost rows/data.
 - Verify Data Set
 - Is this the data you want to use?

Query Methodology

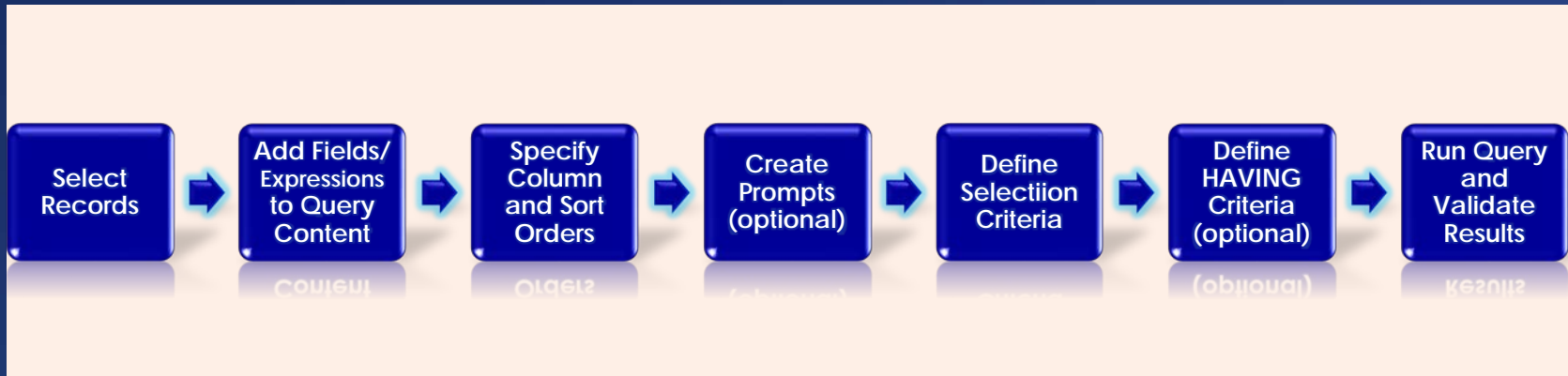
- When creating queries, endeavor to follow a **methodology** similar to the following list:
 - Map out Use of Advanced Functionality
 - Using Expressions
 - Identify Data Type: Numbers, Characters, Date, Drilling URL
 - Identify Needed Manipulation: Data Type Conversion, Totals, Grouping, If-Then Logic
 - Using Subqueries
 - What table(s) and criteria in the subquery are needed?
 - What single field/expression of output needs to be returned?
 - Using Unions
 - What separate query results do you want to merge into a single result set?
 - Can the separate queries be merged to have the same number of fields, same data types, and same display order?

Query Methodology

- When creating queries, endeavor to follow a **methodology** similar to the following list:
 - Build & Test in Increments ****
 - Using/Viewing SQL statement if troubleshooting is needed
 - What's really going on in the background?

PS Query Structural Process Flow

- The below process flow illustrates the basic steps in constructing a PeopleSoft Query:

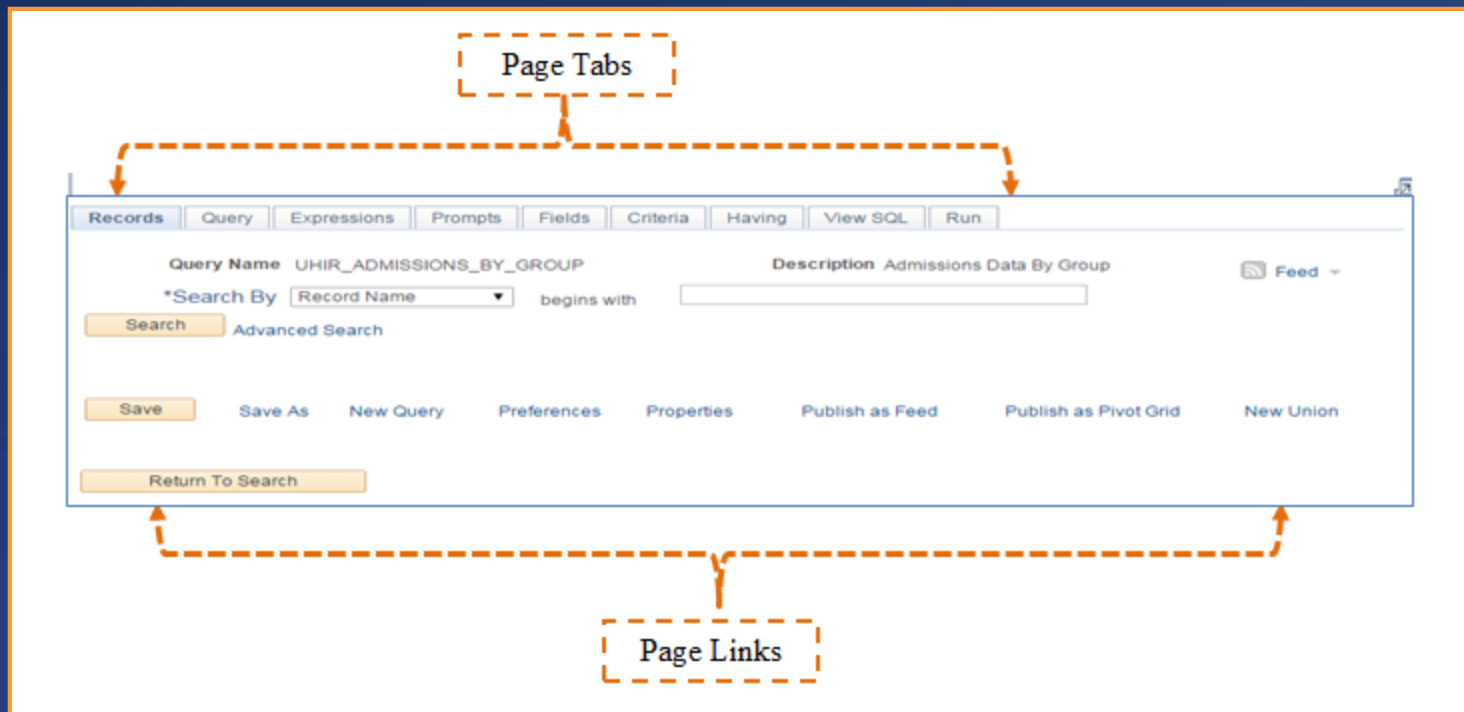


PeopleSoft Query Writing: Basic

Navigating Query Manager

Navigating Query Manager

- Several pages are used in constructing PeopleSoft Queries. Some pages are accessed via tabs located at the top of Query Manager and some are accessed via links, icons, or buttons nested within other pages.



Navigating Query Manager

Summary Page Descriptions:

<u>Page/Page Link</u>	<u>How Used</u>
Records	Select the records upon which to base the query.
Query	Add fields to the query content and navigate to Criteria page. You can also add additional records by performing 'Hierarchical' and 'Related Records' joins. When you first access this page, if you have selected the record for an effective-dated table, a page informs you that an effective date criteria has been automatically added for this record. Click OK to close the page.
Expressions	Expressions are calculations that PeopleSoft Query performs as part of a query. Use them when you must calculate a value that PeopleSoft Query does not provide by default—for example, to add the values from two fields together or to multiply a field value by a constant. You can work with an expression as if it were a field in the query: select it for output, change its column heading, or choose it as an "order by" column. In Query Manager, you can use expressions in two ways: <ul style="list-style-type: none">• As comparison values in selection criteria.• As columns in the query output.
Prompts	Add or edit variables used at run-time.
Fields	View how fields are selected for output; view the properties of each field; change headings and aggregate values; delete fields from output; navigate to Edit Field Ordering page, Edit Field Properties page, and Criteria page

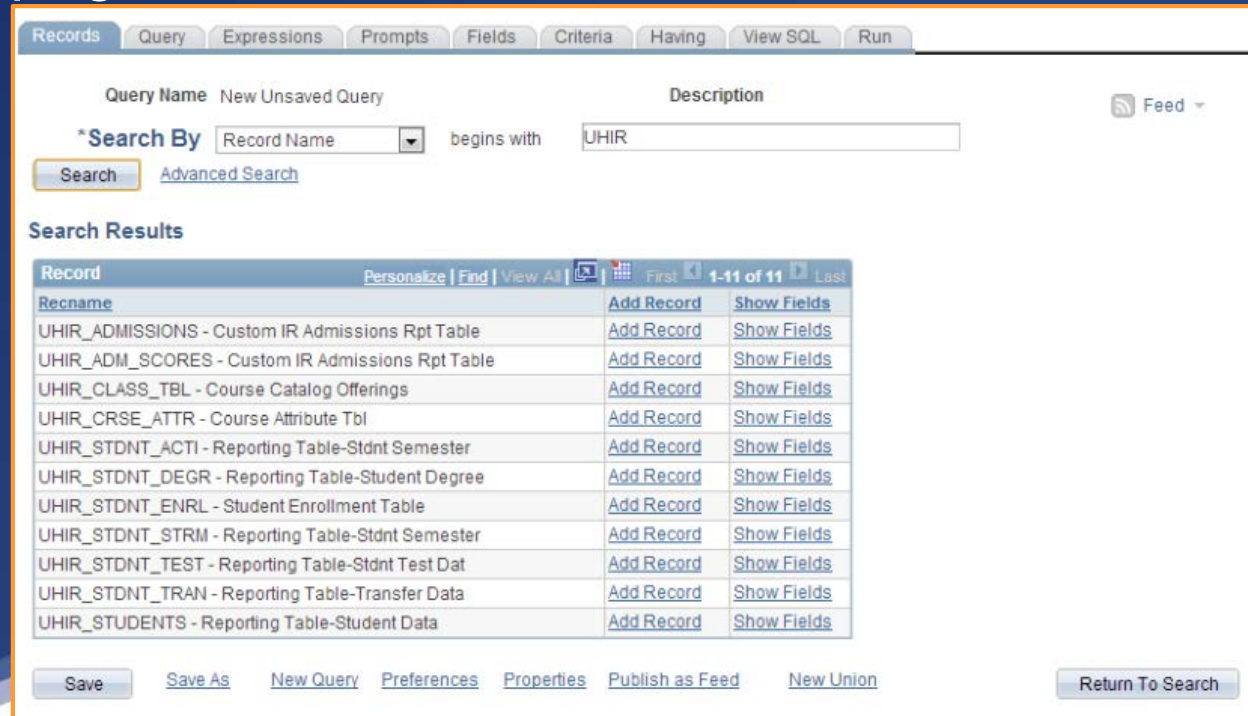
Seeing it in Action...
Navigating Query Manager

PeopleSoft Query Writing: Basic

Creating a Simple Query

Creating a Simple Query

- (1) Search and **select the Primary record**. The first step in building your PS basic query is searching for the primary record to add to your query definition
- The selected record establishes the primary focus of the query. Records are added to the query definition using the **'Records'** page



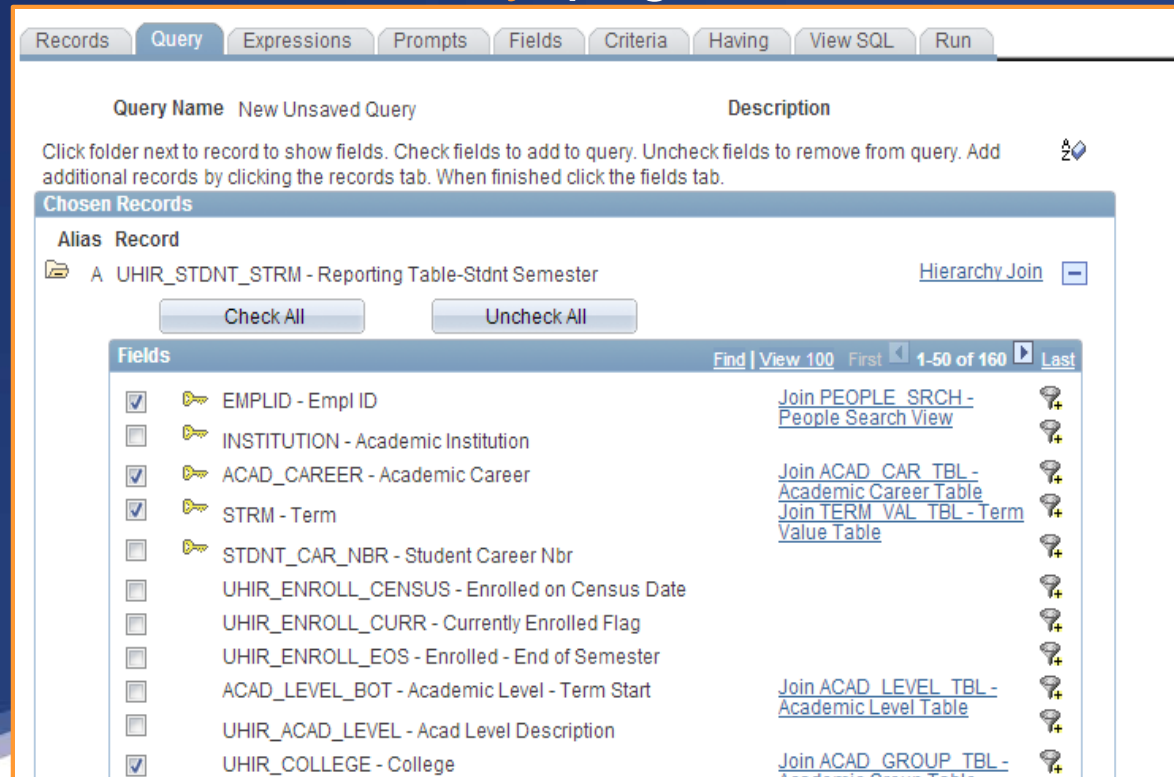
The screenshot displays a web-based query builder interface. At the top, there are tabs for 'Records', 'Query', 'Expressions', 'Prompts', 'Fields', 'Criteria', 'Having', 'View SQL', and 'Run'. Below the tabs, the 'Query Name' is 'New Unsaved Query' and the 'Description' is empty. A search filter is set to '*Search By' 'Record Name' 'begins with' 'UHIR'. There are 'Search' and 'Advanced Search' buttons. The 'Search Results' section shows a table with 11 records, each with 'Add Record' and 'Show Fields' links. The records are:

Record	Personalize	Find	View All	First	1-11 of 11	Last
UHIR_ADMISSIONS - Custom IR Admissions Rpt Table	Add Record	Show Fields				
UHIR_ADM_SCORES - Custom IR Admissions Rpt Table	Add Record	Show Fields				
UHIR_CLASS_TBL - Course Catalog Offerings	Add Record	Show Fields				
UHIR_CRSE_ATTR - Course Attribute Tbl	Add Record	Show Fields				
UHIR_STDNT_ACTI - Reporting Table-Stdnt Semester	Add Record	Show Fields				
UHIR_STDNT_DEGR - Reporting Table-Student Degree	Add Record	Show Fields				
UHIR_STDNT_ENRL - Student Enrollment Table	Add Record	Show Fields				
UHIR_STDNT_STRM - Reporting Table-Stdnt Semester	Add Record	Show Fields				
UHIR_STDNT_TEST - Reporting Table-Stdnt Test Dat	Add Record	Show Fields				
UHIR_STDNT_TRAN - Reporting Table-Transfer Data	Add Record	Show Fields				
UHIR_STUDENTS - Reporting Table-Student Data	Add Record	Show Fields				

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

Creating a Simple Query

- (2) **Select the Fields** that are desired to be displayed on the Report when run by placing a checkmark in the checkbox next to the field
- The fields within the primary record added to the query definition are displayed under the **'Query'** page



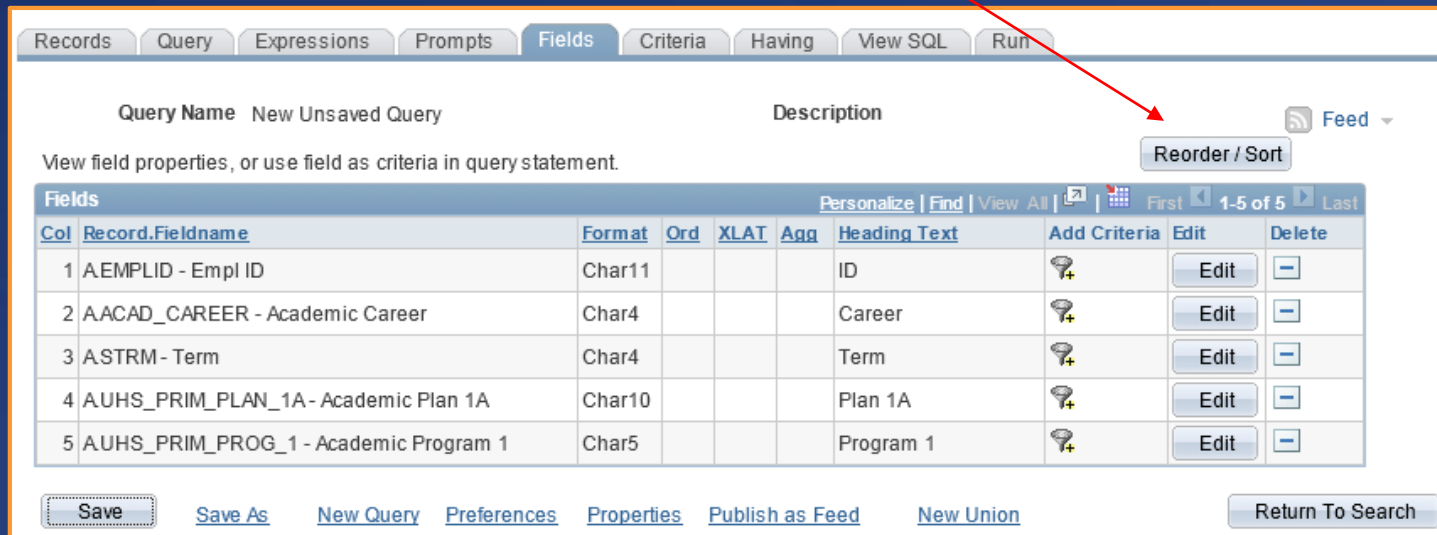
The screenshot displays a query builder interface with the following components:

- Navigation Tabs:** Records, Query (selected), Expressions, Prompts, Fields, Criteria, Having, 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: A
 - Record: UHIR_STDNT_STRM - Reporting Table-Stdnt Semester
 - Buttons: Check All, Uncheck All
- Fields List:**


Field Name	Description	Join
<input checked="" type="checkbox"/> EMPLID - Empl ID	Join PEOPLE_SRCH - People Search View	+
<input type="checkbox"/> INSTITUTION - Academic Institution		+
<input checked="" type="checkbox"/> ACAD_CAREER - Academic Career	Join ACAD_CAR_TBL - Academic Career Table	+
<input checked="" type="checkbox"/> STRM - Term	Join TERM_VAL_TBL - Term Value Table	+
<input type="checkbox"/> STDNT_CAR_NBR - Student Career Nbr		+
<input type="checkbox"/> UHIR_ENROLL_CENSUS - Enrolled on Census Date		+
<input type="checkbox"/> UHIR_ENROLL_CURR - Currently Enrolled Flag		+
<input type="checkbox"/> UHIR_ENROLL_EOS - Enrolled - End of Semester		+
<input type="checkbox"/> ACAD_LEVEL_BOT - Academic Level - Term Start	Join ACAD_LEVEL_TBL - Academic Level Table	+
<input type="checkbox"/> UHIR_ACAD_LEVEL - Acad Level Description		+
<input checked="" type="checkbox"/> UHIR_COLLEGE - College	Join ACAD_GROUP_TBL - Academic Group Table	+

Creating a Simple Query











- (3) **Customize the fields of output.** Click on the Fields tab after selecting the fields. You will notice that the fields displayed are the fields that were previously selected on the Query tab
- (3a) **Specify Column Ordering.** The column order is displayed in the column title Col. The order in which fields are selected is the order in which the column headings will be displayed in the output/report. Click on the **Reorder / Sort** button to change the column order on the report




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

Query Name New Unsaved Query Description  Feed ▾

View field properties, or use field as criteria in query statement. **Reorder / Sort**

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	AEMPLID - Empl ID	Char11				ID		Edit	
2	AACAD_CAREER - Academic Career	Char4				Career		Edit	
3	ASTRM - Term	Char4				Term		Edit	
4	AUHS_PRIM_PLAN_1A - Academic Plan 1A	Char10				Plan 1A		Edit	
5	AUHS_PRIM_PROG_1 - Academic Program 1	Char5				Program 1		Edit	

Personalize | Find | View All |  First 1-5 of 5 Last

Save Save As New Query Preferences Properties Publish as Feed New Union Return To Search

Creating a Simple Query

- (3) **Customize the fields of output.** Click on the Fields tab after selecting the fields. You will notice that the fields displayed are the fields that were previously selected on the Query tab
- (3a) **Specify Column Ordering...**

Edit Field Ordering

Reorder columns by entering column numbers on the left. Columns left blank or assigned a 0 will be automatically assigned a number. Change the order by number by entering numbers on the right. To remove an order by number, leave the field blank or enter a 0.

Edit Field Ordering						Personalize	Find	View All	First	1-5 of 5	Last
New Column	Column	Record.FieldName	Order By	Descending	New Order By						
4	1	AEMPLID - Empl ID		<input type="checkbox"/>							
1	2	AACAD_CAREER - Academic Career		<input type="checkbox"/>							
5	3	ASTRM - Term		<input type="checkbox"/>							
3	4	AUHS_PRIM_PLAN_1A - Academic Plan 1A		<input type="checkbox"/>							
2	5	AUHS_PRIM_PROG_1 - Academic Program 1		<input type="checkbox"/>							

OK Cancel

Creating a Simple Query

- (3) **Customize the fields of output.** Click on the Fields tab after selecting the fields. You will notice that the fields displayed are the fields that were previously selected on the Query tab
- (3b) **Specify Data Sort Ordering.** The report sort order is displayed in the column title Ord. If the Ord value is blank, then the rows will be displayed in the order the rows were entered in the source records instead. To change the report sort order, click on the **Reorder / Sort** button

The screenshot shows a query editor interface with the following elements:

- Navigation tabs: Records, Query, Expressions, Prompts, **Fields**, Criteria, Having, View SQL, Run
- Query Name: New Unsaved Query
- Description: (blank)
- Buttons: Reorder / Sort, Feed
- Text: View field properties, or use field as criteria in query statement.
- Fields Table:

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	AACAD_CAREER - Academic Career	Char4				Career	+	Edit	-
2	AUHS_PRIM_PROG_1 - Academic Program 1	Char5				Program 1	+	Edit	-
3	AUHS_PRIM_PLAN_1A - Academic Plan 1A	Char10				Plan 1A	+	Edit	-
4	AEMPLID - Empl ID	Char11				ID	+	Edit	-
5	ASTRM - Term	Char4				Term	+	Edit	-

Bottom navigation: Save, Save As, New Query, Preferences, Properties, Publish as Feed, New Union, Return To Search

Creating a Simple Query

- (3) **Customize the fields of output.** Click on the Fields tab after selecting the fields. You will notice that the fields displayed are the fields that were previously selected on the Query tab
- (3b) **Specify Data Sort Ordering...The Edit Field Ordering page will be displayed**

Edit Field Ordering

Reorder columns by entering column numbers on the left. Columns left blank or assigned a 0 will be automatically assigned a number. Change the order by number by entering numbers on the right. To remove an order by number, leave the field blank or enter a 0.

New Column	Column	Record.FieldName	Order By	Descending	New Order By
<input type="text"/>	1	AACAD_CAREER - Academic Career		<input type="checkbox"/>	<input type="text"/> 1
<input type="text"/>	2	AUHS_PRIM_PROG_1 - Academic Program 1		<input type="checkbox"/>	<input type="text"/> 2
<input type="text"/>	3	AUHS_PRIM_PLAN_1A - Academic Plan 1A		<input type="checkbox"/>	<input type="text"/> 3
<input type="text"/>	4	AEMPLID - Empl ID		<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	5	ASTRM - Term		<input type="checkbox"/>	<input type="text"/>

OK

Cancel

Creating a Simple Query

- (3) **Customize the fields of output.** Click on the Fields tab after selecting the fields. You will notice that the fields displayed are the fields that were previously selected on the Query tab
- (3b) **Specify Data Sort Ordering...** The updated sort order is displayed in the Ord column

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

Query Name New Unsaved Query Description Feed

View field properties, or use field as criteria in query statement. Reorder / Sort

Fields Personalize | Find | View All | First 1-5 of 5 Last

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	AACAD_CAREER - Academic Career	Char4	1			Career		<input type="button" value="Edit"/>	<input type="button" value="-"/>
2	AUHS_PRIM_PROG_1 - Academic Program 1	Char5	2			Program 1		<input type="button" value="Edit"/>	<input type="button" value="-"/>
3	AUHS_PRIM_PLAN_1A - Academic Plan 1A	Char10	3			Plan 1A		<input type="button" value="Edit"/>	<input type="button" value="-"/>
4	AEMPLID - Empl ID	Char11				ID		<input type="button" value="Edit"/>	<input type="button" value="-"/>
5	A.STRM - Term	Char4				Term		<input type="button" value="Edit"/>	<input type="button" value="-"/>

[Save As](#) [New Query](#) [Preferences](#) [Properties](#) [Publish as Feed](#) [New Union](#)

Creating a Simple Query

- (4) Add criteria...

The screenshot shows a query builder interface with the following elements:

- Navigation tabs: Records, Query, Expressions, Prompts, Fields, **Criteria**, Having, View SQL, Run
- Query Name: New Unsaved Query
- Description: (empty)
- Buttons: Add Criteria, Group Criteria, Reorder Criteria
- Criteria Table:

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	AINSTITUTION - Academic Institution	equal to	00730	Edit	-
AND	AUHIR_ENROLL_EOS - Enrolled - End of Semester	equal to	Y	Edit	-
AND	ASTRM - Term	equal to	1730	Edit	-

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

Creating a Simple Query

- (5) **Save your query definition.** Query names are uppercase and can be up to 30 characters. No spaces or any special characters (other than an underscore) are allowed.
 - A description for the query can be given, which can be up to 30 characters, mixed case, with special characters.
 - Queries can be saved for public use or private use.
 - Users are also provided an option to save their query definition to specific folders.

Enter a name to save this query:

*Query:

Description:

Folder:

*Query Type: ▼

*Owner: ▼

Query Definition:

2014-11 (MC):
Type a more detailed description of your query here...

Seeing it in Action...
Creating a Simple Query

Questions?

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