



PeopleSoft Training

Human Resources Intermediate Query 9.1

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Human Resources Intermediate Query 9.1

Creating and Formatting a New Query

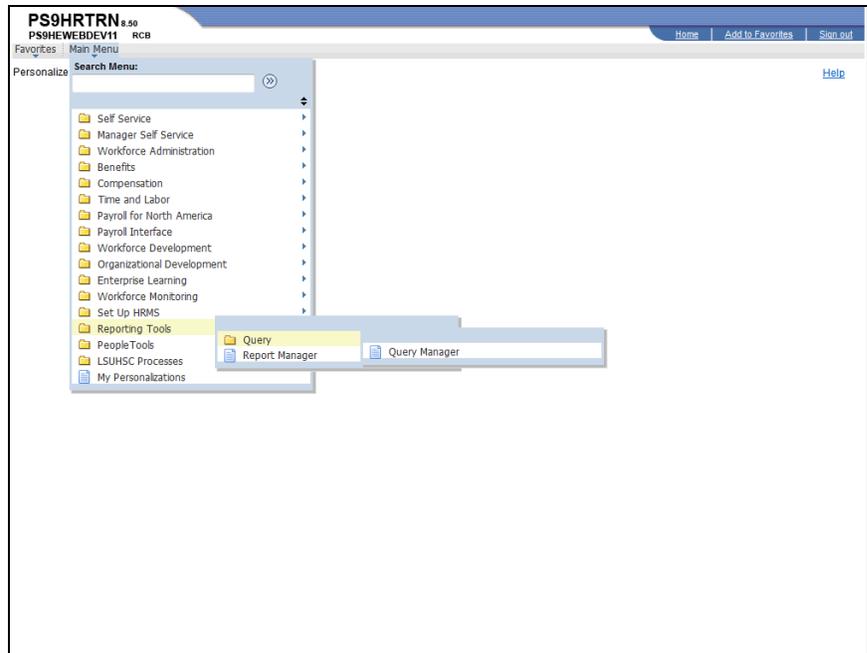
Create A New Query

Procedure

In this topic you will learn how to create a new query.

In this example the query will display the employee's **name, emplid, department, original hire date, and highest education level.**

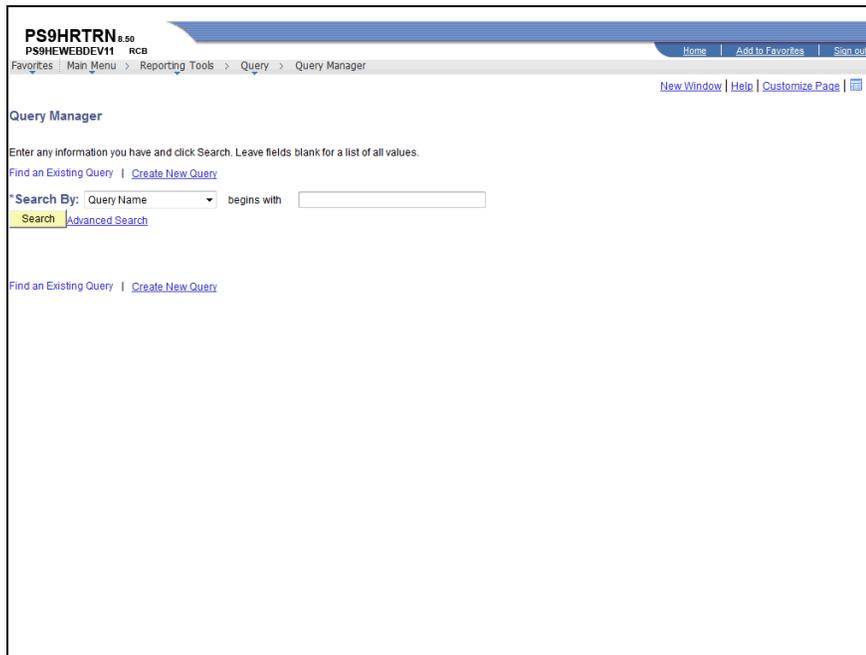
Step	Action
1.	Click the Main Menu button. 
2.	Point to the Reporting Tools menu.
3.	Point to the Query menu.



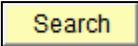
Step	Action
4.	Click the Query Manager menu. 

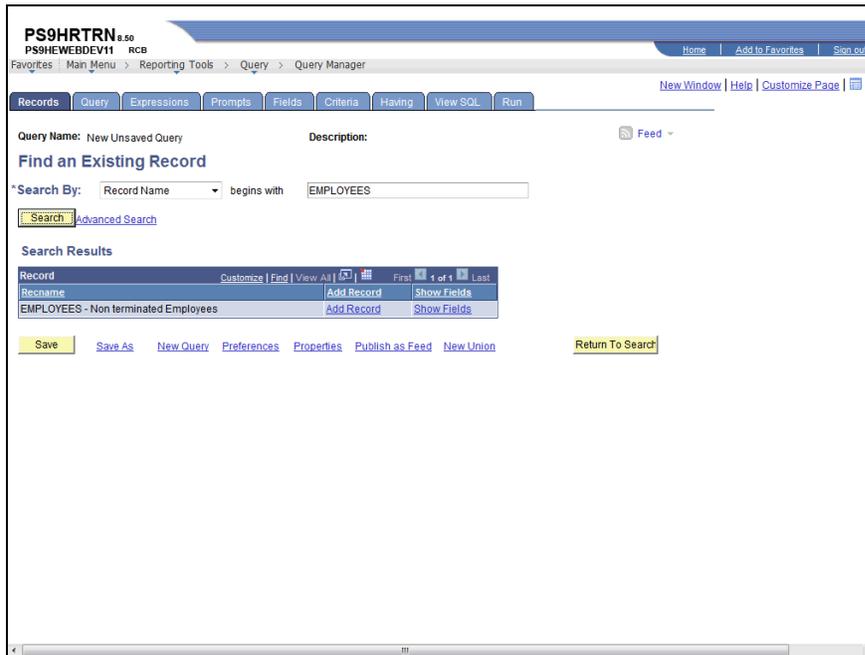
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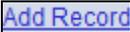
Human Resources Intermediate Query 9.1

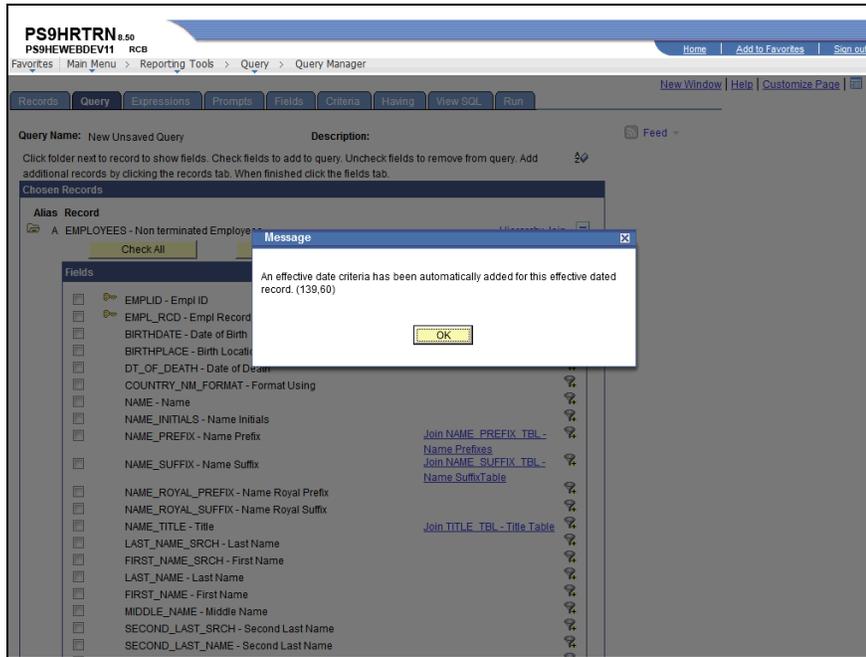


Step	Action
5.	Click the Create New Query link. Create New Query
6.	Adding Records: The Records page is the first page that you will see when you click the Create New Query link on the Search page. You will select the information for your query on the Records page.
7.	The Records page displays the records (tables) available to query in alphabetical order. The list of records available to the end-user is determined by his/her security rights (Operator ID). The end-user may view existing records by selecting one of the following methods: 1. Click the Search button to view a list of records; or 2. Enter the appropriate search criteria (record name) into the Search by field. The end-user may enter the full record name or partial information in CAPS or lower case. Use the % (percent sign) to act as a wildcard when searching.
8.	In this example you will use fields from one record -- the EMPLOYEEES record. In order to find the record enter " employees " into the begins with field.

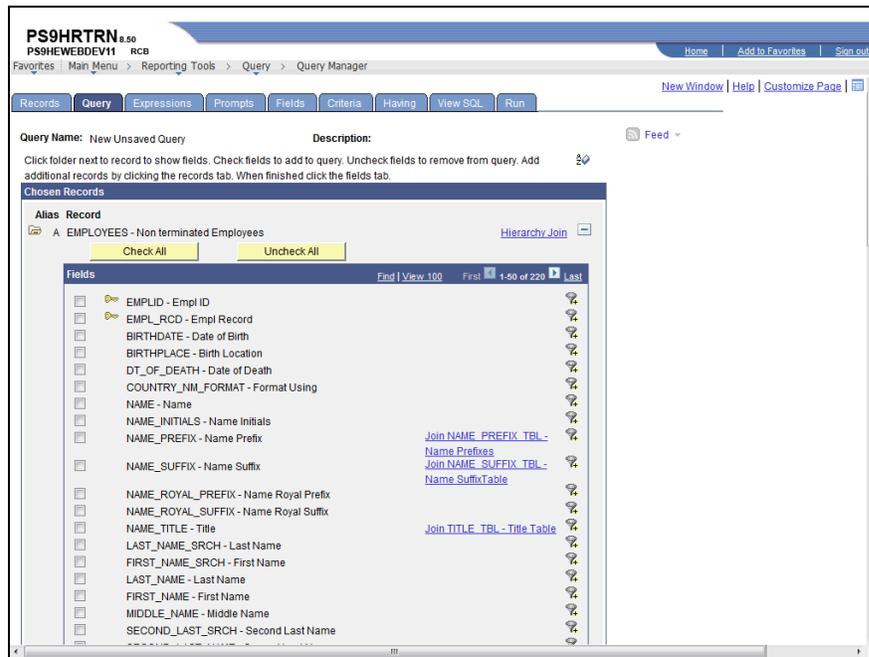
Step	Action
9.	Click the Search button. 



Step	Action
10.	The EMPLOYEES record displays in the Search Results. Click the Add Record link to select the record and view the fields in that record on the Query page. 

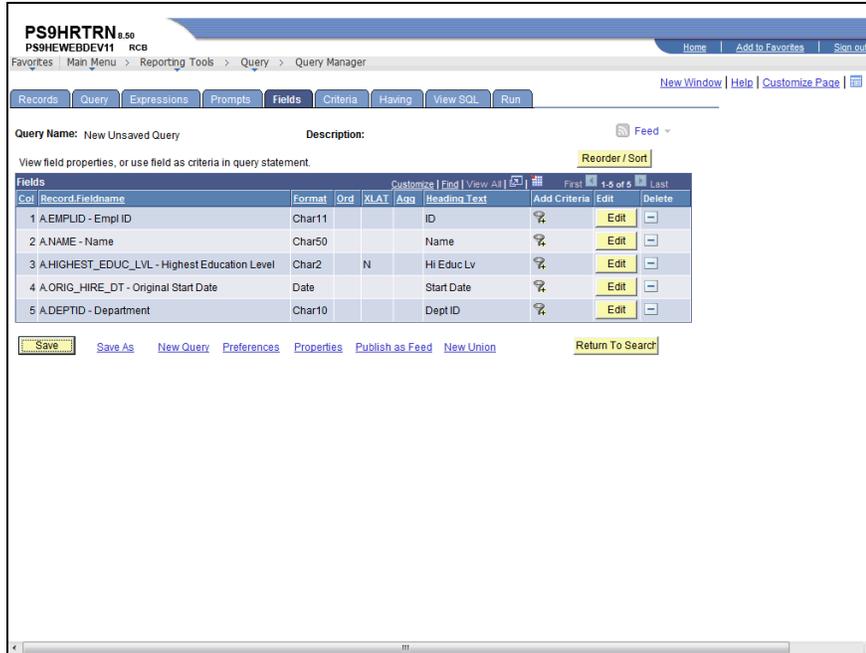


Step	Action
11.	<p>If the record is <i>effective dated</i>, a message will appear stating the effective date criteria is automatically added.</p> <p>Click the OK button if this message displays.</p> 
12.	<p>Selecting Fields:</p> <p>The record and the fields in the record appear on the Query page. It is here that you will select fields to build the query by clicking the checkbox in front of the field.</p> <p>Note: You may click the checkbox to deselect a field or click the Uncheck All Fields button to deselect all fields that are checked.</p>
13.	The Key symbol in front of the field indicates Key fields.
14.	The Add Criteria symbol (funnel with a plus sign) allows you to add criteria from the record itself. Adding criteria will be covered in the Working with Criteria and Prompts section.

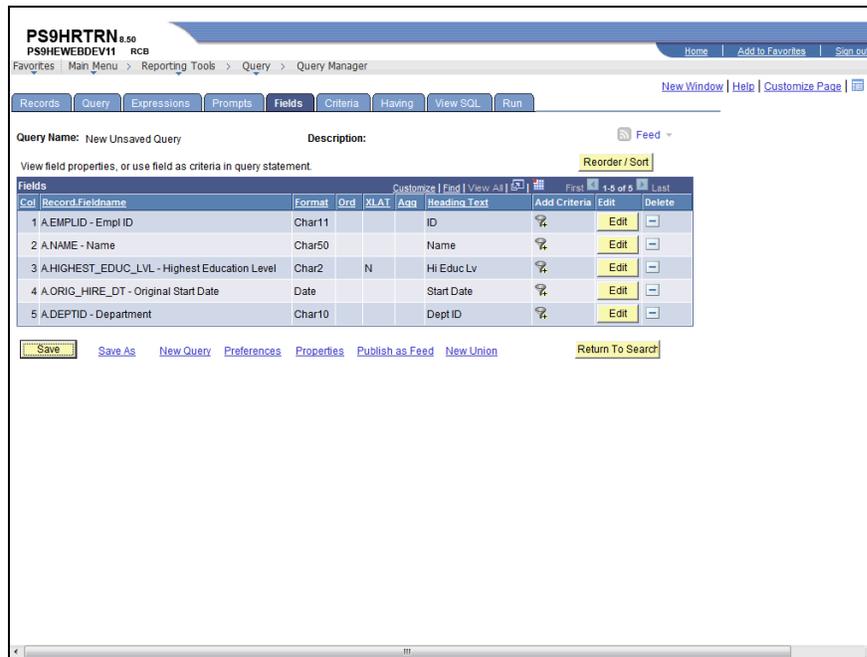


Step	Action
15.	<p>Note: The fields default in hierarchical order (i.e. the Key fields in the record appear at the top of the list).</p> <p>Click the Sort fields alphabetically button to sort fields in alphabetical order.</p> <p>You may return the fields to the hierarchical order by clicking the Sort fields alphabetically button again.</p> 
16.	<p>Click the EMPLID checkbox.</p> 
17.	<p>Click the NAME checkbox.</p> 
18.	<p>Click the HIGH_EDUC_LVL checkbox.</p> 
19.	<p>Click the Show next row (Alt+.) button.</p> 
20.	<p>Click the ORIG_HIRE_DT checkbox.</p> 
21.	<p>Click the DEPTID checkbox.</p> 

Step	Action
22.	<p>The Fields page displays the fields used in the query. You may format your query layout on this page. This will be covered in Format a Query section.</p> <p>Click the Fields tab.</p> 



Step	Action
23.	<p>On the fields page verify all the records needed for your results are listed.</p> <p>If not, return to the query tab select/deselect the appropriate fields.</p> <p>The Run tab allows you to see the query results before saving your query.</p> <p>Click the Run tab.</p> 
24.	<p>Click the Fields tab.</p> 



Step	Action
25.	Click the Save As link. Save As
26.	Enter the *Query Name . Note: The Query Name may be entered in CAPS or lowercase (once you click OK it will be converted to CAPS). The Query Name is limited to 30 characters. Spaces or special characters are not allowed. The end-user may opt to use the underscore (_) to separate the words Enter " EMPLIST ".
27.	Enter the Description . Note: The Description is limited to 30 characters and it may contain spaces or special characters. The Description may be entered in CAPS, lowercase or mixed case, but will appear the way it has been entered. Enter " employee list ".
28.	Enter the Query Definition . Enter " list of employee and their highest education level ".

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Human Resources Intermediate Query 9.1



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 Home | Add to Favorites | Sign out
 Favorites | Main Menu > Reporting Tools > Query > Query Manager
[New Window](#) | [Help](#) | [Customize Page](#) |

Enter a name to save this query as:

*Query:
 Description:
 Folder:
 *Query Type:
 *Owner:

Query Definition:

Step	Action
29.	Click the OK button. <input type="button" value="OK"/>
30.	This completes Create a New Query . End of Procedure.

Format A Query

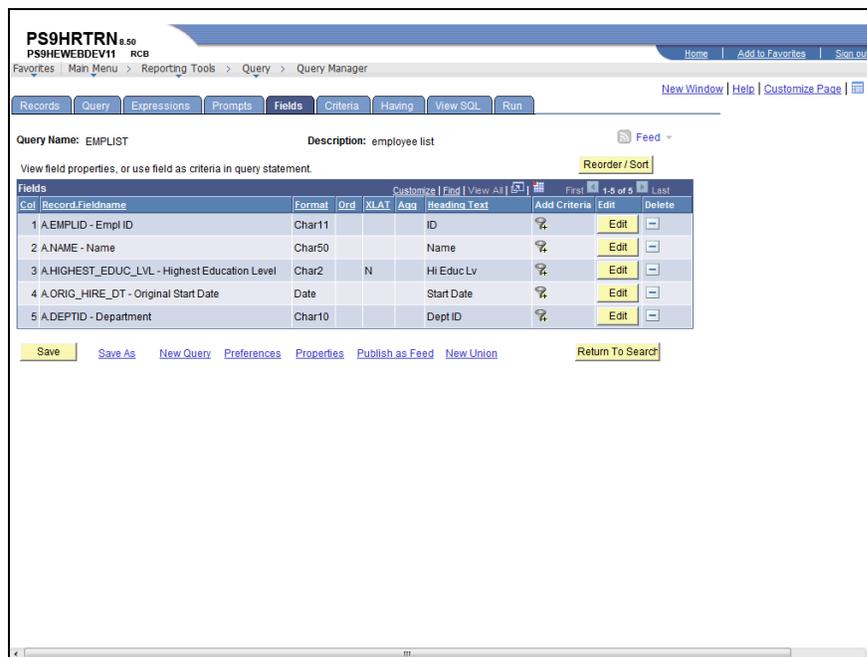
Procedure

In this topic you will learn how to format the query results to change the display. This is accomplished on the Fields page. The following are the format options available:

- Change the column heading text.
- Sort the output results by a particular field.
- Change the order of the columns (i.e. the order in which the fields appear in the query results).
- Change the translate code when this option is available for a field.

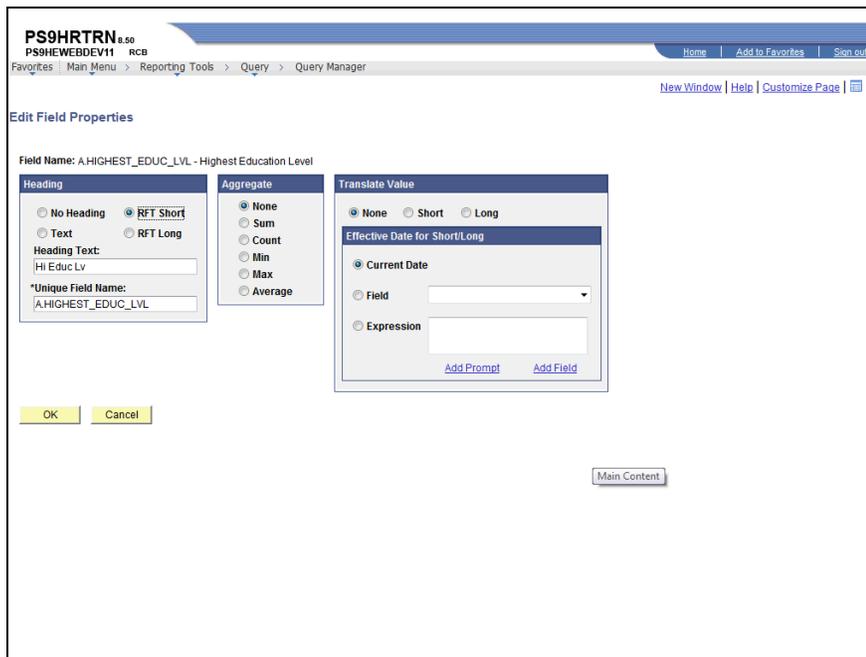
In this example the query results will be formatted as follows:

- Change the heading text to reflect the long description for Highest Education Level.
- Sort the data by Highest Education Level in descending order.
- Change the order of the Highest Education Level field to display as the first column.
- Display the long description of each person's Highest Education Level rather than the default code.

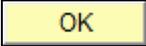


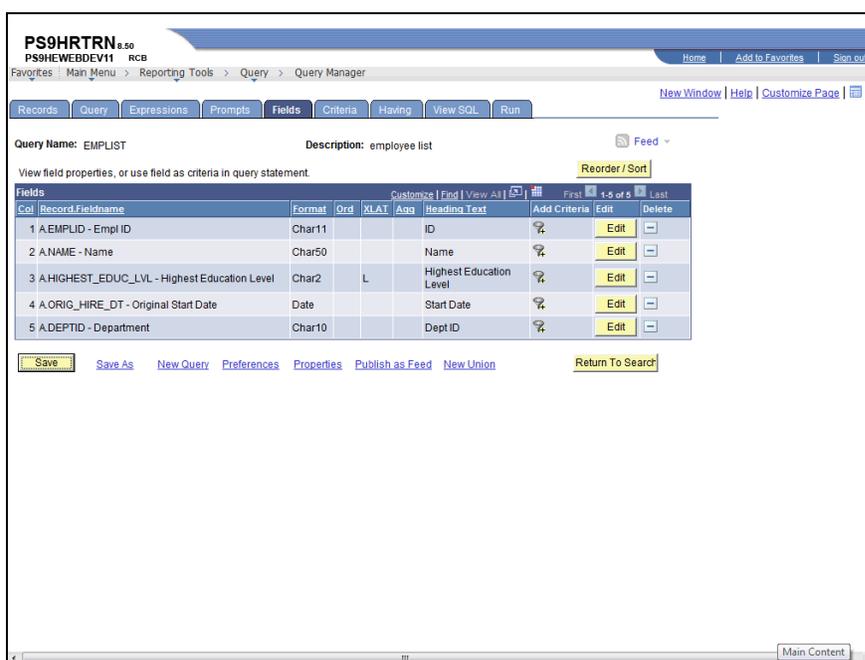
Step	Action
1.	<p>Click the Edit button for the Highest Education Level field.</p> <p>Note: Fields are formatted one at a time.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin: 5px;">Edit</div>

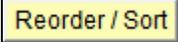
Step	Action
2.	<p>In the Heading box:</p> <ul style="list-style-type: none"> · The RFT Short option will display the default selection (Hi Educ Lv) in the column heading. · The RFT Long option will display the long description (Highest Education Level) in the column heading. · The Heading Text option will display the free text (that you type) in the column heading.

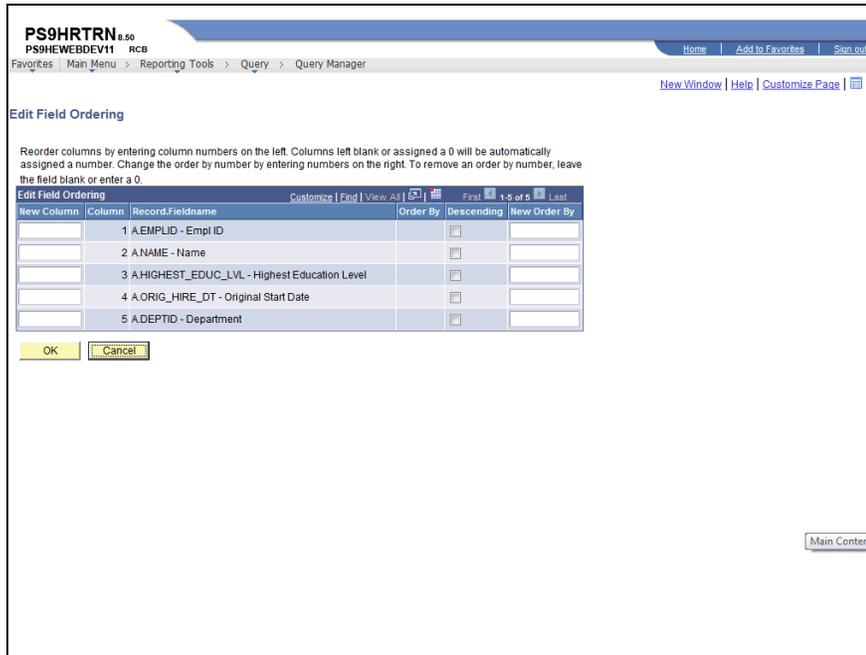


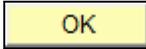
Step	Action
3.	<p>Enter the desired information into the Heading Text field. Enter "Highest Education Level".</p>
4.	<p>The Translate Value box will not appear on this page if a field does not have an associated Translate Value.</p> <p>If a field has an associated Translate Value, the XLT column will contain one of the following three values:</p> <ul style="list-style-type: none"> · N (None) option will display the default translate code (e.g. "G" for a Bachelor's Degree) in the query results. · S (Short) option will display a maximum of 10 characters (e.g. Bachelor's) in the query results. · L (Long) option will display a maximum of 30 characters (e.g. G-Bachelor's Level Degree) in the query results.

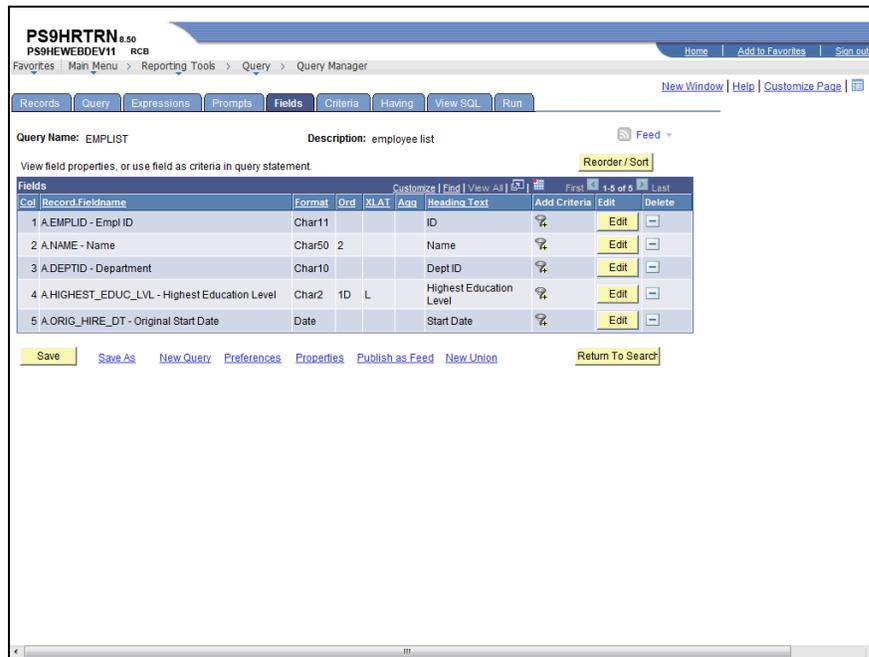
Step	Action
5.	For Translate Value , click the Long option to allow the full description of each person's highest education level to display (instead of abbreviation code). 
6.	Click the OK button. 
7.	You can see on the Fields page the changes you made to the field properties for HIGHEST_EDUC_LVL .



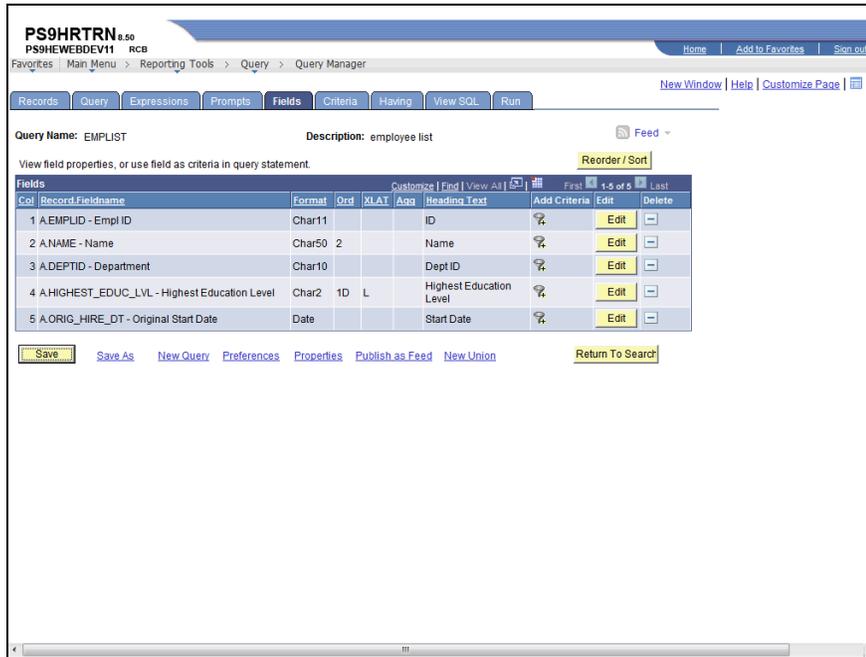
Step	Action
8.	Reorder/Sort: Click the Reorder / Sort button. 
9.	The Edit Field Ordering page allows you to view and change the Sort Order and Output Order of the fields in a single page. In this example, the query results will be changed as follows: <ul style="list-style-type: none"> · The query results will be sorted by Highest Education Level first and then by Name. · The fields (columns) will appear in the following order: Highest Education Level, EmplID, Name, Department and Original Hire Date.



Step	Action
10.	Click the Descending option for Highest Education Level. This option allows the results to sort the Highest Education Level first. 
11.	Enter " 1 " in the New Order By column to display the Highest Education Level as the heading in the first column of the query results.
12.	Enter " 4 " into the New Column field for Highest Education Level . This field will now be the fourth column displayed in the query results.
13.	Enter " 5 " into the New Column field for ORIG_HIRE_DT.. . This field will now be the fifth column displayed in the query results.
14.	Enter " 2 " into the New Order By field for Name . The query results will now be sorted by HIGHEST_EDUC_LVL in descending order first and then by NAME in ascending (A-Z) order.
15.	Click the OK button. 



Step	Action
16.	Click the Run tab to view the new order of the fields, sort order, and column headings. 
17.	Click the Fields tab. 



Step	Action
18.	<p>Using the Distinct Option:</p> <p>Note: When running a query, occasionally the same row of output may be listed more than once when it meets multiple query requirements. Using the Distinct option removes duplicate rows of data. However, the end-user should note that this option may remove pertinent duplicate information, depending on the query. Therefore, if the end-user is not sure if any pertinent data will be removed by selecting this option, the safer alternative would be to run the query results to Excel and manipulate the data in the spreadsheet.</p> <p>If the end-user is confident that pertinent data will not be removed, the Distinct option is located in the Query Properties box.</p> <p>Click the Properties link.</p> <p>Properties</p>

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

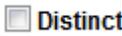
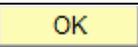
[New Window](#) | [Help](#) | [Customize Page](#) | 

Query Properties

*Query:
 Description:
 Folder:
 *Query Type: User
 *Owner: Private
 Distinct Security Join Optimizer

Query Definition:
 list of employee and their highest education level

Last Updated Date/Time: 05/02/2012 9:05:09AM
 Last Update User ID: TWASH3

Step	Action
19.	Click the Distinct option. 
20.	Click the OK button. 

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

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

Query Name: EMPLIST Description: employee list [Feed](#)

View field properties, or use field as criteria in query statement. [Reorder / Sort](#)

Col	Record_Fieldname	Format	Qnt	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.EMPLID - Empl ID	Char11				ID		<input type="button" value="Edit"/>	
2	A.NAME - Name	Char50	2			Name		<input type="button" value="Edit"/>	
3	A.DEPTID - Department	Char10				Dept ID		<input type="button" value="Edit"/>	
4	A.HIGHEST_EDUC_LVL - Highest Education Level	Char2	1D	L		Highest Education Level		<input type="button" value="Edit"/>	
5	A.ORIG_HIRE_DT - Original Start Date	Date				Start Date		<input type="button" value="Edit"/>	

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

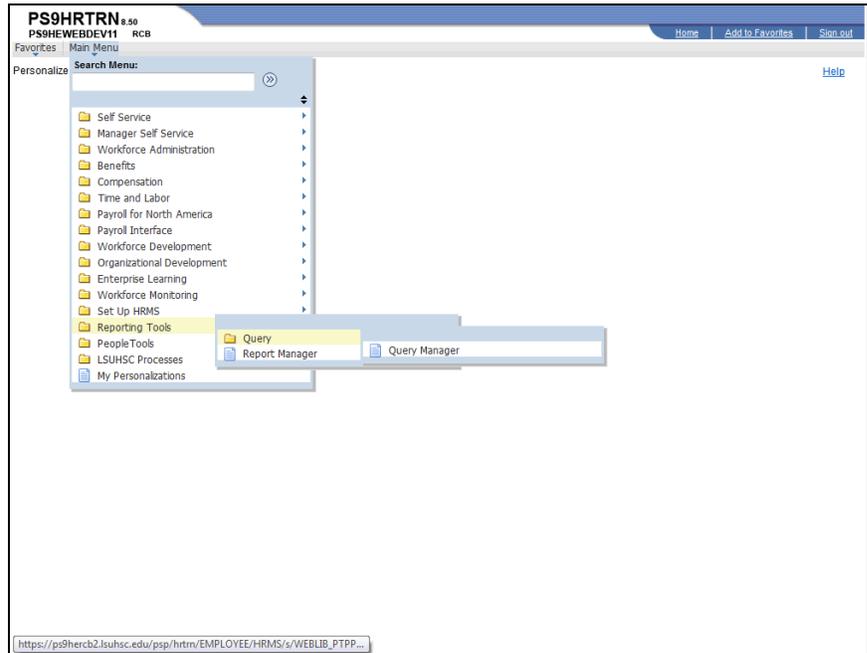
Step	Action
21.	Click the Save button. Note: When you run the query again, any duplicate rows will be deleted. 
22.	This completes <i>Format Query</i> . End of Procedure.

Format Name and Description

Procedure

In this topic you will learn to Rename a query and change a queries description.

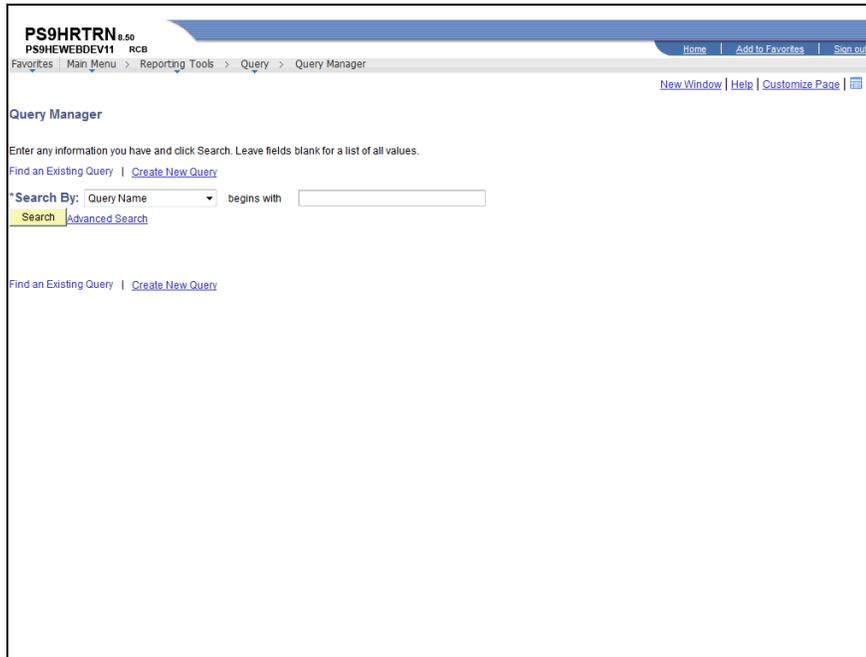
Step	Action
1.	Click the Main Menu button. 
2.	Point to the Reporting Tools menu.
3.	Point to the Query menu.

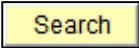


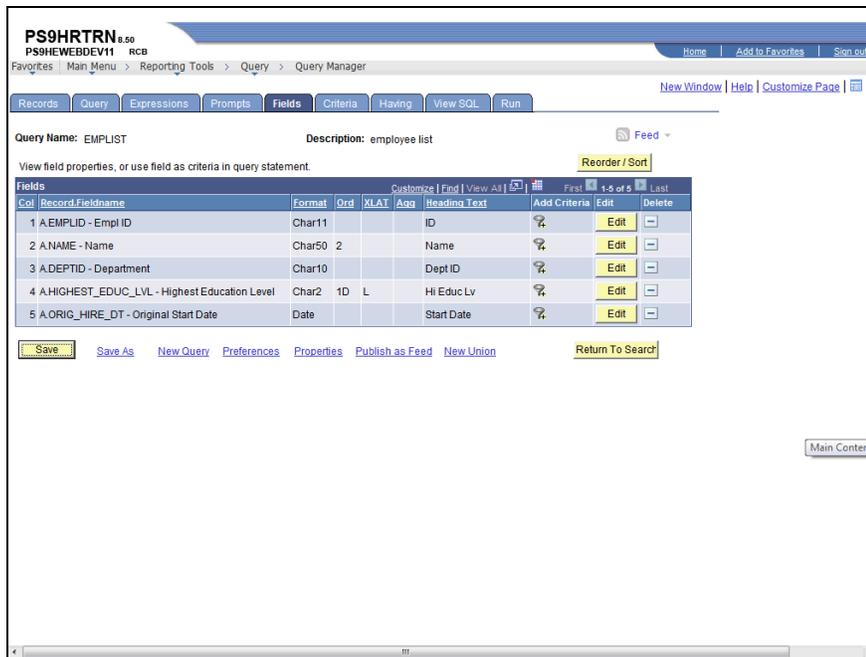
Step	Action
4.	Click the Query Manager menu. 

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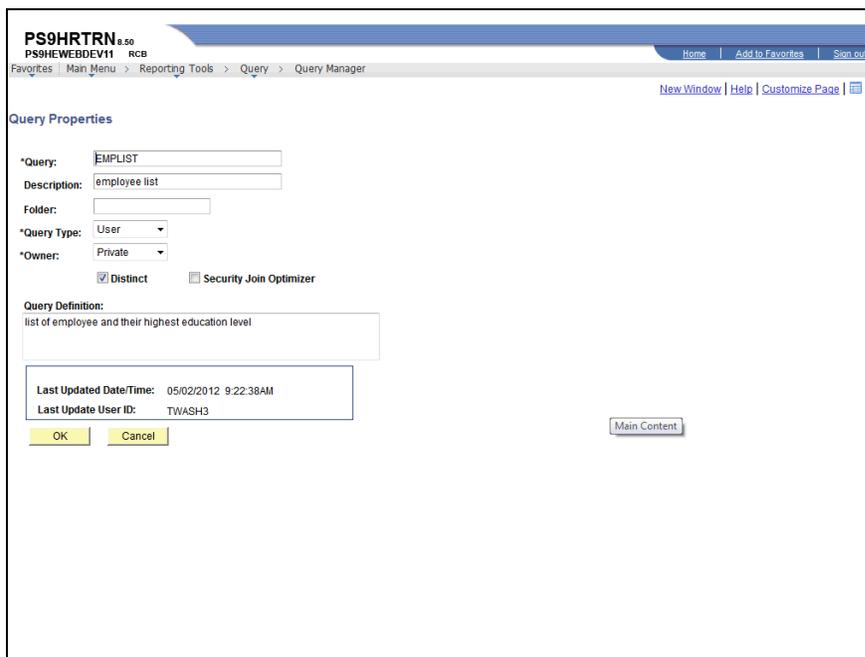
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Step	Action
5.	Click the Search button. 
6.	Click the Edit link for the EMPLOYEE_LIST query. 



Step	Action
7.	Click the Properties link. 



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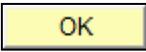
[New Window](#) | [Help](#) | [Customize Page](#) | 

Query Properties

*Query:
 Description:
 Folder:
 *Query Type:
 *Owner:
 Distinct Security Join Optimizer

Query Definition:

Last Updated Date/Time: 05/02/2012 9:22:38AM
 Last Update User ID: TWASH3

Step	Action
8.	Enter the desired information into the Query field. Enter " BIOMED_EMPLOYEE_LIST ".
9.	Enter the desired information into the Description field. Enter " Biological Medical EmpEmpl I Info ".
10.	Click the OK button. 

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

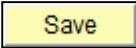
Query Name: BIOMED_EMPLOYEE_LIST Description: Biological Medical Emp Info Feed

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	A	EMPLID - Empl ID	Char11				ID			Edit	
2	A	NAME - Name	Char50	2			Name			Edit	
3	A	DEPTID - Department	Char10				Dept ID			Edit	
4	A	HIGHEST_EDUC_LVL - Highest Education Level	Char2	1D	L		Hi Educ Lv			Edit	
5	A	ORIG_HIRE_DT - Original Start Date	Date				Start Date			Edit	

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

Main Content

Step	Action
11.	Click the Save button. 
12.	This completes <i>Format Name and Description</i> . End of Procedure.

Working with Criteria and Prompts

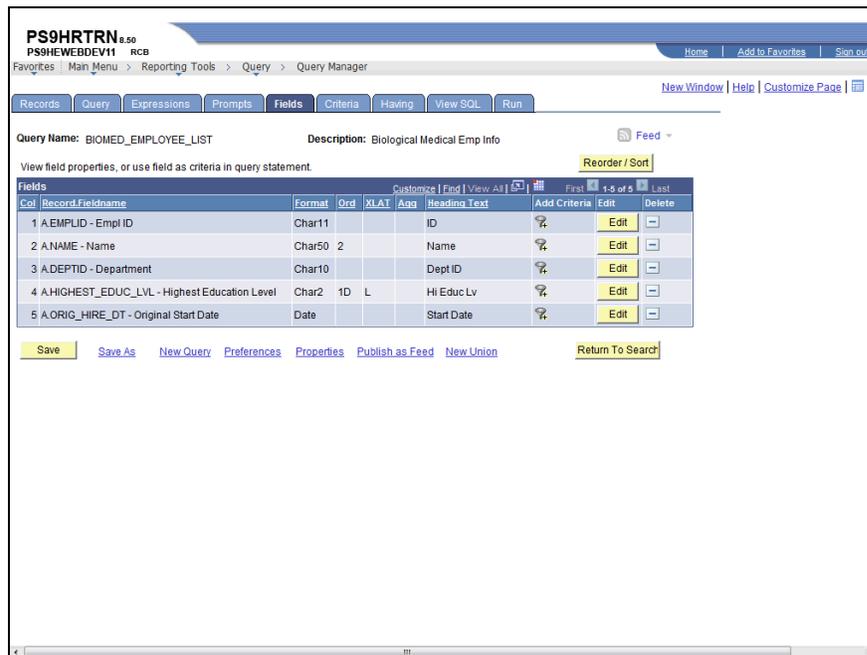
When you build a query you may wish to add certain criteria to limit the query results to a particular condition (e.g. a specific value, a list of values or between two specified values). Although, there are several conditions which you may select, the three most used Condition Types will be covered in Query Intermediate (i.e. equal to, in list and between).

Add a Single Criteria

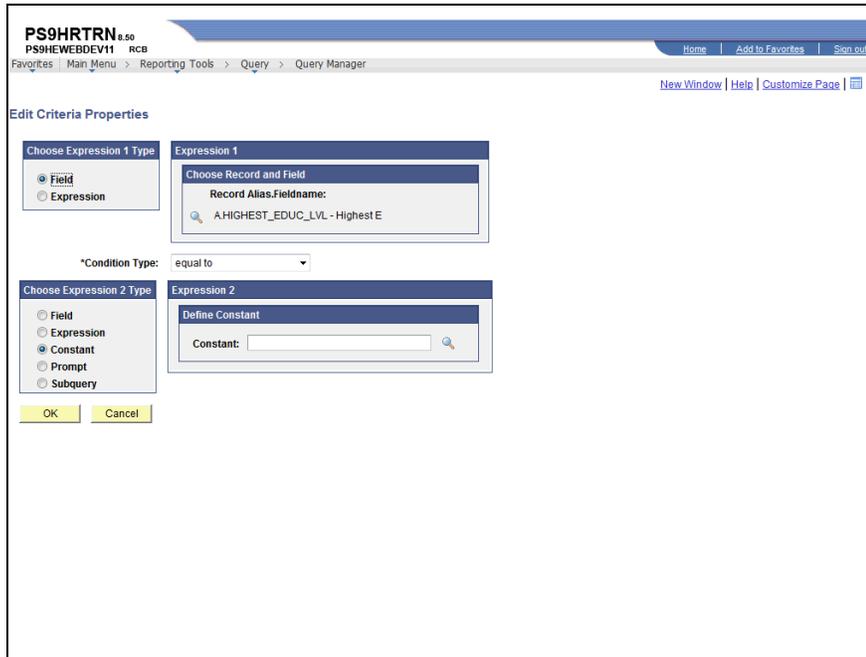
Procedure

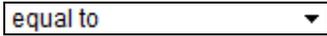
In this topic you learn how to add a single criteria to the query in order to limit the query results to a specified value.

In this example the query will display the employees whose highest education level is **Doctorate (Academic)**. To do this you will use the "equal to" Condition Type.



Step	Action
1.	Click the Add Criteria button for HIGHEST_EDUC_LVL . 



Step	Action
2.	<p>Click the drop-down arrow for *Condition Type and select the "equal to" option.</p> <p>Note: The "equal to" Condition Type finds data having a value that matches the specific value.</p> 
3.	<p>Note: The Expression 2 Type defaults to Constant when "equal to" is selected.</p> <p>Click the Select Constant From List button to access the list of education level types and define the desired constant.</p> 

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Select A Constant

Field Value	Translate Long Name	Translate Short Name	Select Constant
A	A-Not Indicated	Not Indic	Select Constant
B	B-Less Than HS Graduate	Less Th HS	Select Constant
C	C-HS Graduate or Equivalent	HS Grad	Select Constant
D	D-Some College	Some Coll.	Select Constant
E	E-Technical School	Tech Sch	Select Constant
F	F-2-Year College Degree	2-Yr Coll	Select Constant
G	G-Bachelor's Level Degree	Bachelors	Select Constant
H	H-Some Graduate School	Some Grad	Select Constant
I	I-Master's Level Degree	Master's	Select Constant
J	J-Doctorate (Academic)	Doctorate	Select Constant
K	K-Doctorate (Professional)	MD,DDS,JD	Select Constant
L	L-Post-Doctorate	Post-Doct.	Select Main Content
M	Associate Degree	Associate	Select Constant
N	General Education Degree	GED	Select Constant
O	Foreign Degree-No Equivalent	Foreign NE	Select Constant
P	Master's Degree Plus 3 Years	Mast + 3	Select Constant
Q	Medical Doctor	Med Doc	Select Constant
R	Juris Doctor	Jur Doc	Select Constant
S	Specialist in School Psychology	SSP	Select Constant
ZY	Doctorate	Doctorate	Select Constant
ZZ	DDS	DDS	Select Constant

[Cancel](#)

Step	Action
4.	Click the Select Constant link for "J" Doctorate (Academic). Select Constant

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Edit Criteria Properties

Choose Expression 1 Type

Field
 Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:

A.HIGHEST_EDUC_LVL - Highest E

*Condition Type: equal to

Choose Expression 2 Type

Field
 Expression
 Constant
 Prompt
 Subquery

Expression 2

Define Constant

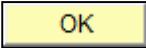
Constant: J

[OK](#) [Cancel](#)

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Step	Action
5.	Click the OK button. 

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

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

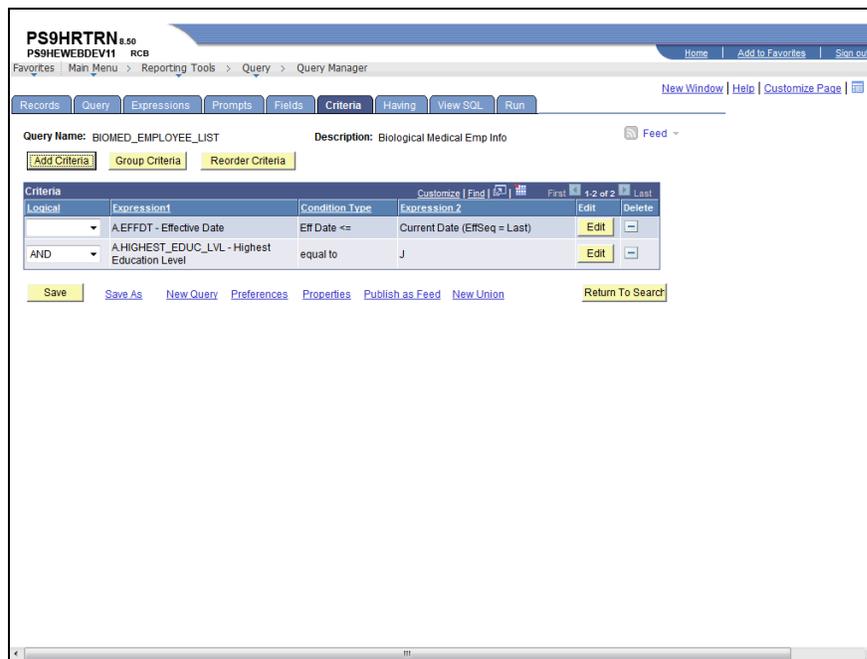
Query Name: BIOMED_EMPLOYEE_LIST Description: Biological Medical Emp Info Feed

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

Col	Record	Fieldname	Format	Ord	XLAT	Ang	Heading Text	Add Criteria	Edit	Delete
1	A	EMPLID - Empl ID	Char11				ID			
2	A	NAME - Name	Char50	2			Name			
3	A	DEPTID - Department	Char10				Dept ID			
4	A	HIGHEST_EDUC_LVL - Highest Education Level	Char2	1D	L		Hi Educ Lv			
5	A	ORIG_HIRE_DT - Original Start Date	Date				Start Date			

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

Step	Action
6.	Click the Criteria tab. 



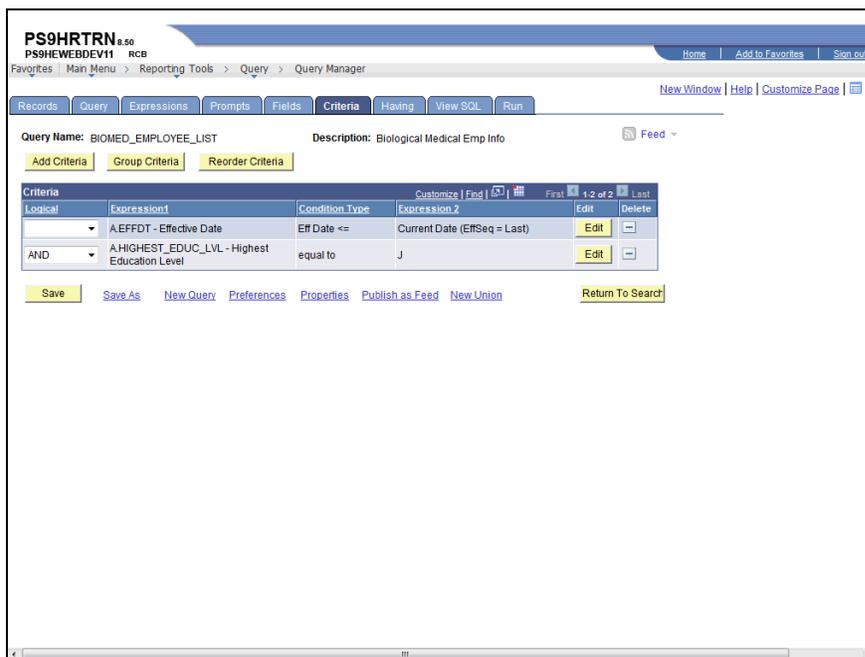
Step	Action
7.	Note: The Criteria tab now indicates HIGHEST_EDUC_LVL = J Click the Run tab. 
8.	Note: The query results display only those employees (whose records you may access) with a highest education level of J-Doctorate (Academic) .
9.	This completes <i>Add a Single Criteria</i> . End of Procedure.

Add a Group of Criteria Using In List

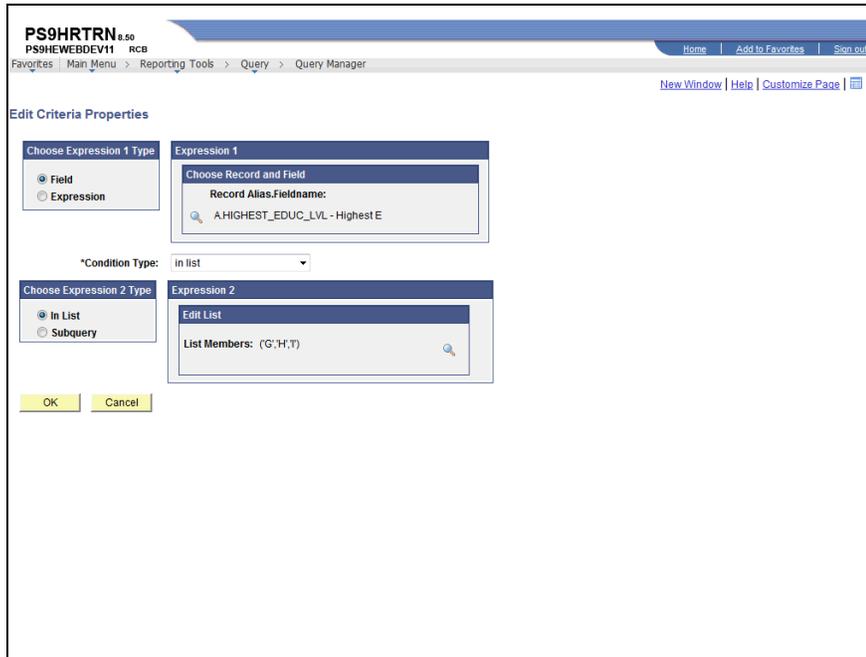
Procedure

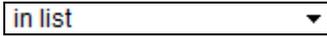
In this topic you learn how to add a group of criteria to the query in order to limit the query results to a list of specified values.

In this example the query will display the employees whose highest education levels are **Bachelor's Degree, Some Graduate School and Master Level Degree**. To do this you will use the **"in list"** Condition Type.



Step	Action
1.	<p>Note: When changing the criteria of a field that has already been added to the Criteria tab, do not return to the Fields tab to add the field to the Criteria tab again. Doing so will cause an error in your search results.</p> <p>Instead, edit the field that already appears in the Criteria tab by clicking the Edit button.</p> <p>Click the Edit button for Highest Education Level.</p> <div style="border: 1px solid black; padding: 2px; display: inline-block; margin-top: 5px;">Edit</div>



Step	Action
2.	<p>Click the drop-down arrow for *Condition Type and select the in list option.</p> <p>Note: The "in list" Condition Type finds data having a value that matches any one of the values in a specified list of values.</p> <p></p>
3.	<p>Click the Select List Members button.</p> <p></p>

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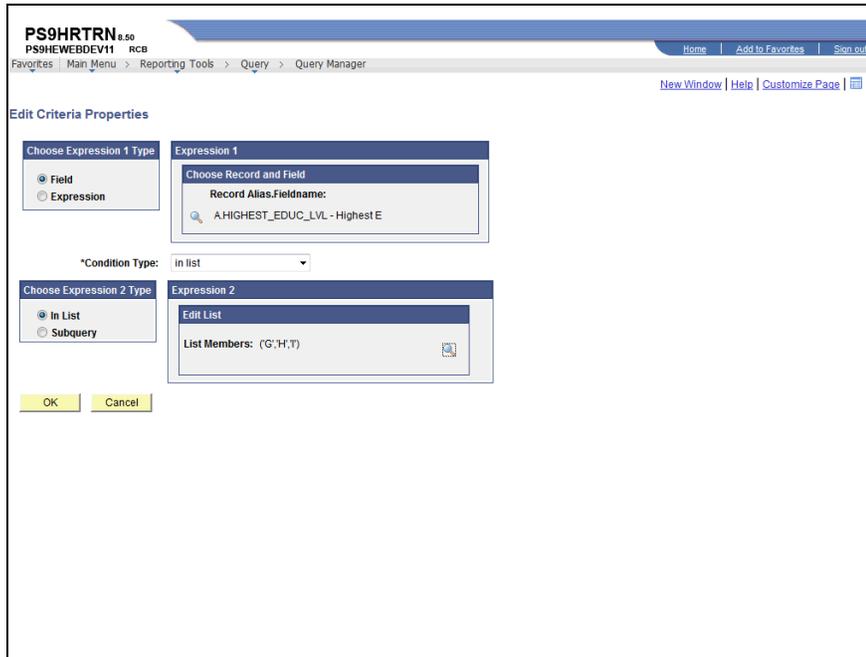
Edit List

No values have been added yet.

Value:

Field Value	Translate Long Name	Translate Short Name	Add Value
A	A-Not Indicated	Not Indic	<input type="button" value="Add Value"/>
B	B-Less Than HS Graduate	Less Th HS	<input type="button" value="Add Value"/>
C	C-HS Graduate or Equivalent	HS Grad	<input type="button" value="Add Value"/>
D	D-Some College	Some Coll.	<input type="button" value="Add Value"/>
E	E-Technical School	Tech Sch	<input type="button" value="Add Value"/>
F	F-2-Year College Degree	2-Yr Coll	<input type="button" value="Add Value"/>
G	G-Bachelor's Level Degree	Bachelor's	<input type="button" value="Add Value"/>
H	H-Some Graduate School	Some Grad	<input type="button" value="Add Value"/>
I	I-Master's Level Degree	Master's	<input type="button" value="Add Value"/>
J	J-Doctorate (Academic)	Doctorate	<input type="button" value="Add Value"/>
K	K-Doctorate (Professional)	MD,DDS,JD	<input type="button" value="Add Value"/>
L	L-Post-Doctorate	Post-Doct.	<input type="button" value="Add Value"/>
M	M-Associate Degree	Associate	<input type="button" value="Add Value"/>
N	N-General Education Degree	GED	<input type="button" value="Add Value"/>
O	O-Foreign Degree-No Equivalent	Foreign NE	<input type="button" value="Add Value"/>
P	P-Master's Degree Plus 3 Years	Mast + 3	<input type="button" value="Add Value"/>
Q	Q-Medical Doctor	Med Doc	<input type="button" value="Add Value"/>
R	R-Juris Doctor	Jur Doc	<input type="button" value="Add Value"/>

Step	Action
4.	Click the Add Value button for G-Bachelor's Level Degree . <input type="button" value="Add Value"/>
5.	Click the Add Value button for H-Some Graduate School . Note: To delete a value, check the box that appears in front of the value that you wish to delete under List Members and click the Delete Checked Values button. <input type="button" value="Add Value"/>
6.	Click the Add Value button I-Master's Level Degree . <input type="button" value="Add Value"/>
7.	Click the OK button. <input type="button" value="OK"/>



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Edit Criteria Properties

Choose Expression 1 Type

Field
 Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:

A.HIGHEST_EDUC_LVL - Highest E

*Condition Type: in list

Choose Expression 2 Type

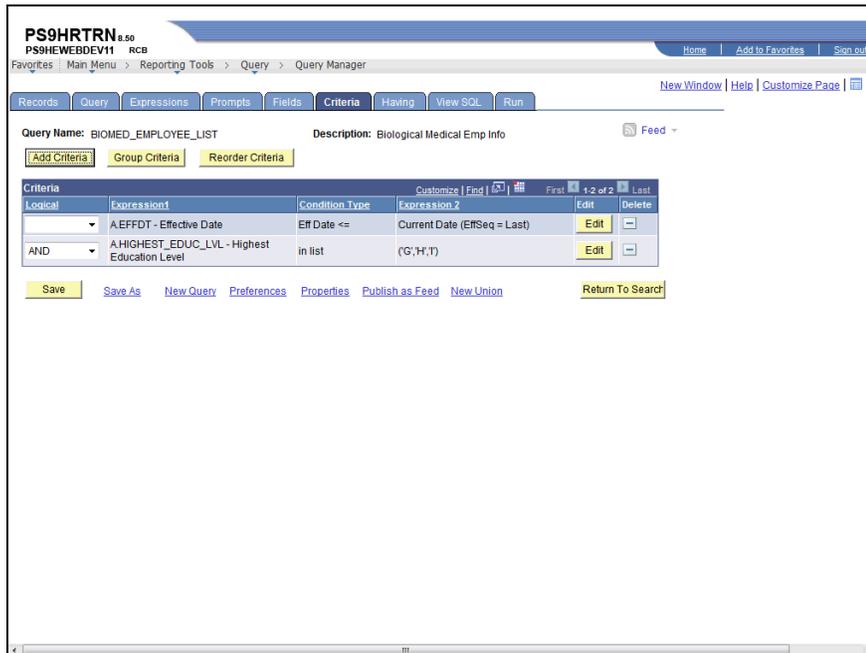
In List
 Subquery

Expression 2

Edit List

List Members: (G;H;T)

Step	Action
8.	Click the OK button.



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

Query Name: BIOMED_EMPLOYEE_LIST Description: Biological Medical Emp Info 

Logical	Expression 1	Condition Type	Expression 2	Edit	Delete
	A.EFFDT - Effective Date	Eff Date <=	Current Date (EffSeq = Last)	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
AND	A.HIGHEST_EDUC_LVL - Highest Education Level	in list	(G;H;T)	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

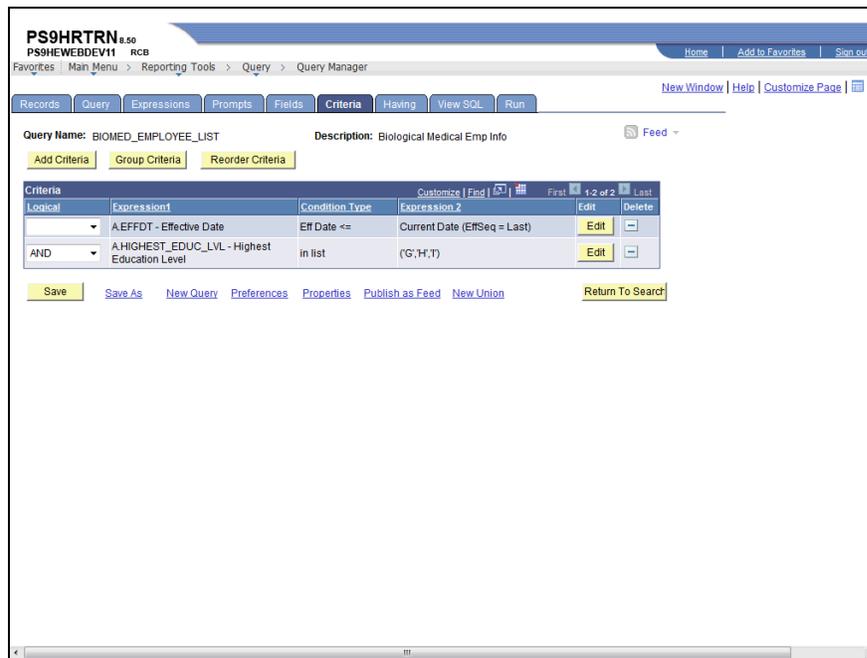
Step	Action
9.	<p>Note: The Criteria tab now indicates HIGHEST_EDUC_LVL with the values of G, H and I.</p> <p>Click the Run tab.</p> 
10.	<p>Note: The query results are limited to employees whose highest education level is Bachelor's Degree, Some Graduate School and Master Level Degree.</p>
11.	<p>This completes <i>Add a Group of Criteria Using In List</i>.</p> <p>End of Procedure.</p>

Using Between Criteria

Procedure

In this topic you learn how to add a criteria to the query in order to limit the query results to data that falls between two specified values.

In this example the query will display the employees whose original hire date is between January 1, 2004 and July 31, 2004. To do this you will use the **"between"** Condition Type.



Step	Action
1.	Click the Fields tab. 

Training Guide

Human Resources Intermediate Query 9.1



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

Query Name: BIOMED_EMPLOYEE_LIST Description: Biological Medical Emp Info

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

Col	Record_Fieldname	Format	Ord	XLAT	Agg	Heading_Text	Add Criteria	Edit	Delete
1	AEMPLID - Empl ID	Char11				ID		Edit	
2	A.NAME - Name	Char50	2			Name		Edit	
3	A.DEPTID - Department	Char10				Dept ID		Edit	
4	A.HIGHEST_EDUC_LVL - Highest Education Level	Char2	10	L		Hi Educ Lv		Edit	
5	A.ORIG_HIRE_DT - Original Start Date	Date				Start Date		Edit	

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

Step	Action
2.	Click the Add Criteria button.

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Edit Criteria Properties

Choose Expression 1 Type: Field Expression

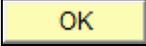
Expression 1: Choose Record and Field
Record Alias.Fieldname:
A.ORIG_HIRE_DT - Original Star

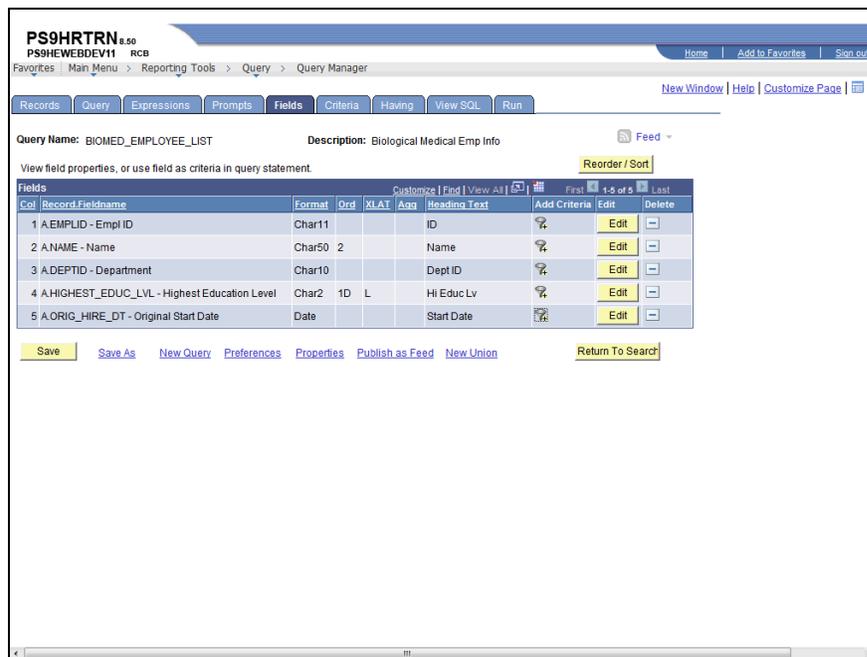
*Condition Type: equal to

Choose Expression 2 Type: Field Expression Constant Prompt Subquery

Expression 2: Define Constant
*Date:

OK Cancel

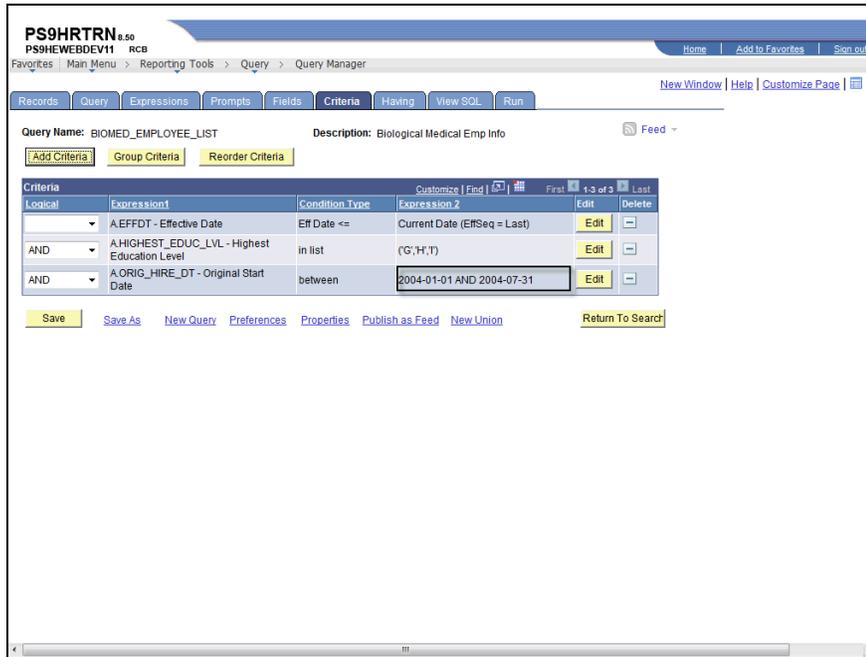
Step	Action
3.	Click the drop-down arrow for * Condition Type and select the between option. 
4.	Enter the desired information into the Date field. Enter " 010104 ".
5.	Enter the desired information into the Date 2 field. Enter " 073104 ".
6.	Click the OK button. 



Step	Action
7.	Click the Criteria tab. 

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Human Resources Intermediate Query 9.1



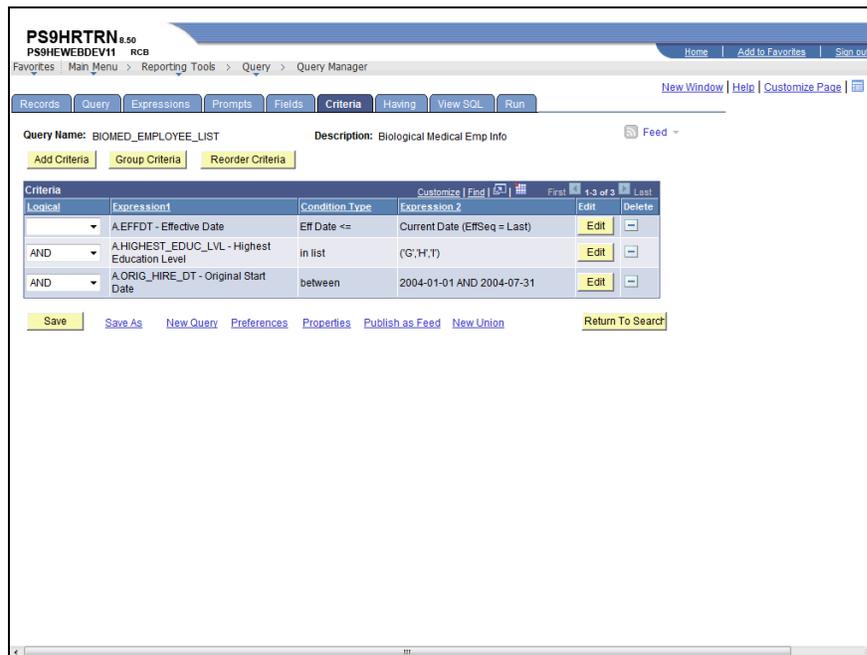
Step	Action
8.	<p>Note: The Criteria tab indicates ORIG_HIRE_DT between 2004-01-01 and 2004-07-31.</p> <p>Click the Run tab.</p> 
9.	<p>Note: In addition to the highest education level criteria established in the previous exercise, the query output now also reflects only those employees hired between 01/01/2004 and 07/31/2004.</p>
10.	<p>This completes <i>Using Between Criteria</i>. End of Procedure.</p>

Creating a Prompt for Criteria

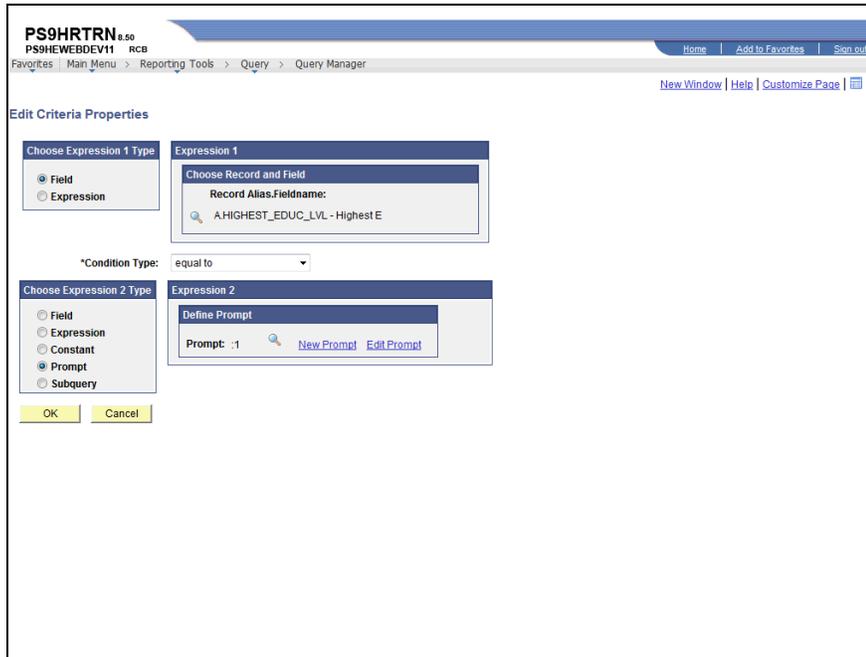
Procedure

In this topic you learn how to add a prompt to the query which will allow you to select a desired value each time the query is run.

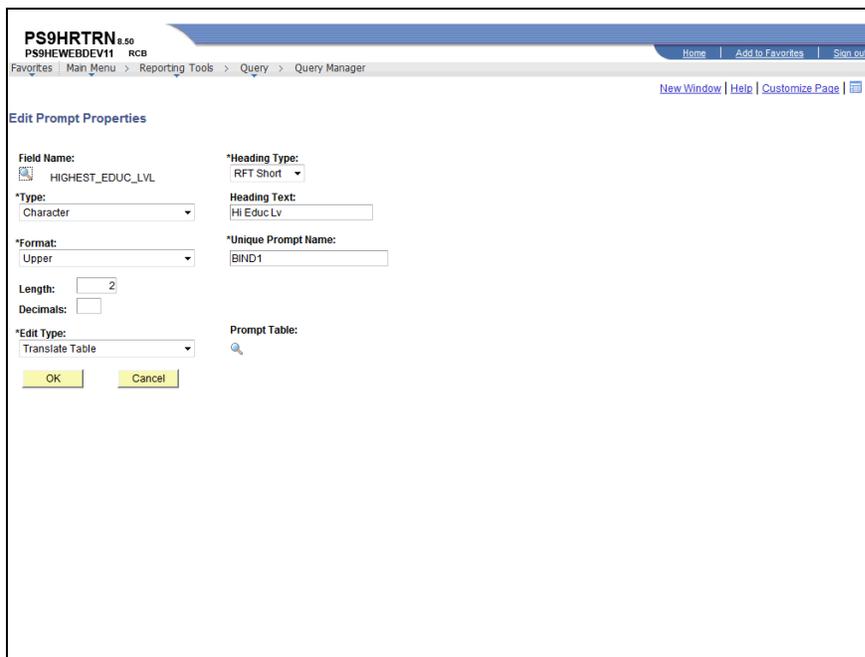
In this example, when you run the query you will be prompted to select the desired highest education level. To do this you will use the **"equal to"** Condition Type and create a **"prompt"** expression.



Step	Action
1.	Click the Edit button for HIGHEST_EDUC_LVL . 



Step	Action
2.	Click the equal to list item. Note: In order to use a prompt, the Condition Type should be set to " Equal to " <div style="border: 1px solid black; padding: 2px; display: inline-block;">equal to ▼</div>
3.	Click the Prompt option. <div style="border: 1px solid black; padding: 2px; display: inline-block;"><input type="radio"/> Prompt</div>
4.	Click the New Prompt link. <div style="border: 1px solid black; padding: 2px; display: inline-block;">New Prompt</div>



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Edit Prompt Properties

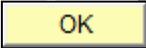
Field Name: *Heading Type:

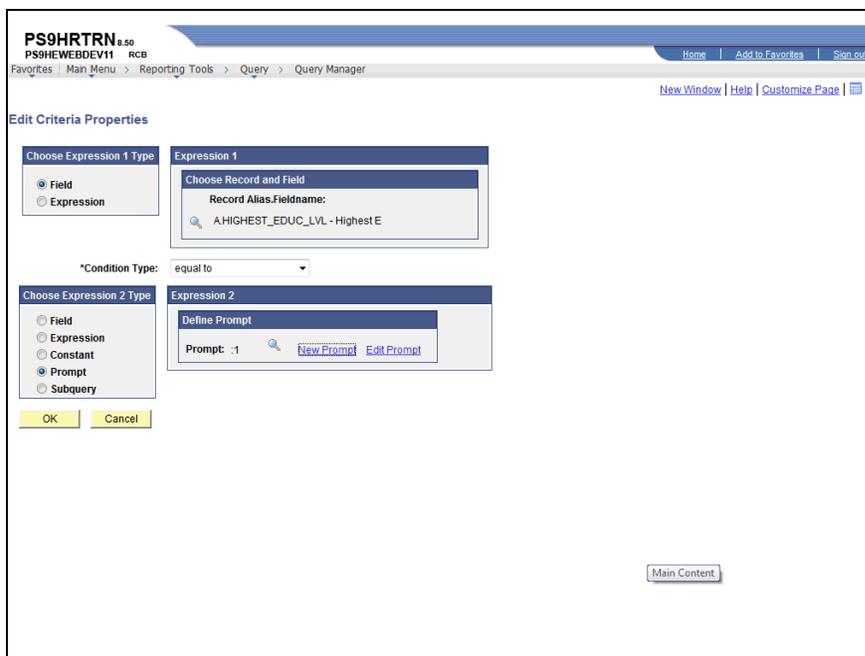
*Type: Heading Text:

*Format: *Unique Prompt Name:

Length: Decimals:

*Edit Type: Prompt Table:

Step	Action
5.	<p>Click the OK button.</p> <p>Note: Mosts users will not make changes to the default values on this Edit Prompt Properties page.</p> 



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Edit Criteria Properties

Choose Expression 1 Type: Field Expression

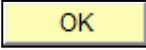
Expression 1: Choose Record and Field
Record Alias Fieldname:

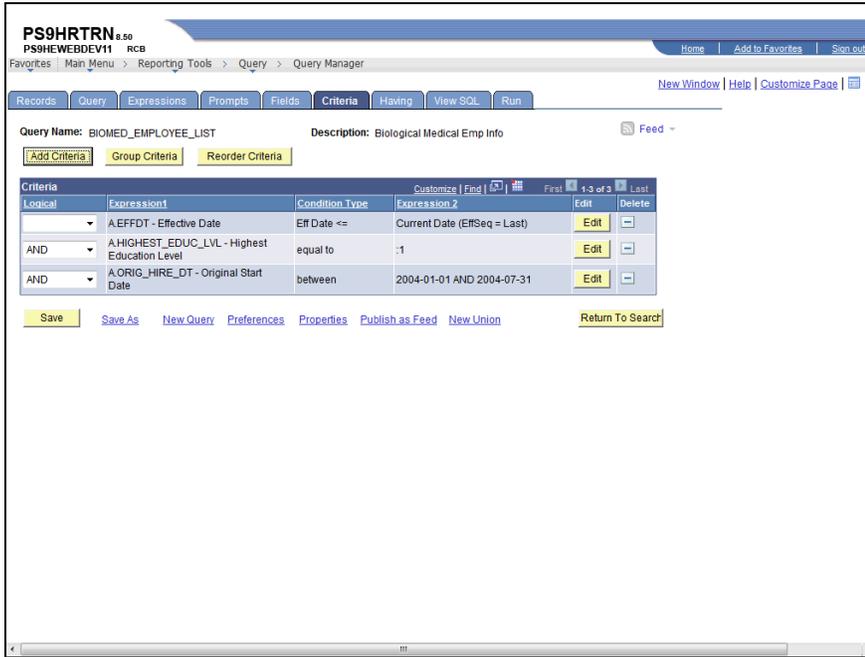
*Condition Type:

Choose Expression 2 Type: Field Expression Constant Prompt Subquery

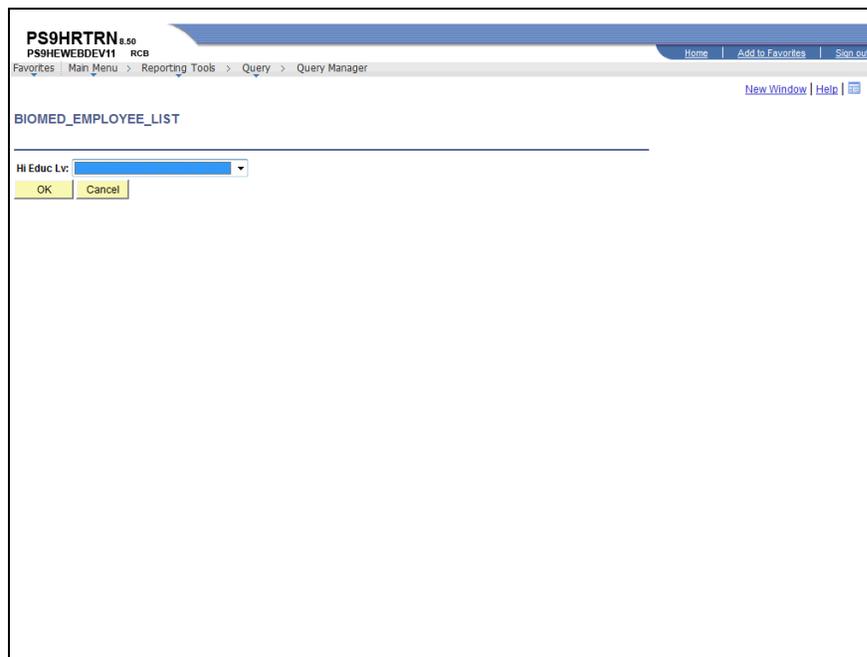
Expression 2: Define Prompt
Prompt: [New Prompt](#) [Edit Prompt](#)

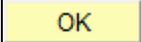
[Main Content](#)

Step	Action
6.	Click the OK button. 



Step	Action
7.	Note: The Criteria tab now indicates that HIGHEST_EDUC_LVL has a prompt (:1). Additional prompts will be denoted as :2, :3, etc. Click the Run tab. 



Step	Action
8.	<p>You are prompted to select the desired highest education level.</p> <p>Click the Hi Educ Lv list.</p> 
9.	<p>Click the Medical Doctor list item.</p> 
10.	<p>Click the OK button.</p> 
11.	<p>Note: The query results display those employees whose highest education level is Medical Doctor.</p> <p>Note: You Save your changes before selecting another link from the menu (e.g. Reporting Tools) by clicking the Save or Save As button. <i><u>There is no Warning that changes will be lost.</u></i></p>
12.	<p>This completes <i>Creating a Prompt for Criteria</i>.</p> <p>End of Procedure.</p>

Using Multiple Tables in a Query

When creating a query, it may be necessary to retrieve data from more than one table (record) or specify criteria in your query from a second table. In these cases, you need to link at least two tables in one query. Query enables you to run a query that pulls information from multiple tables. When you perform a join, the records involved are linked based on common fields.

Linking multiple tables, or joining, enables Query to retrieve data from more than one table, but the query output will appear as if the data is retrieved from a single table.

Working with multiple tables is almost as easy as working with one.

The three joins that are covered in Query Intermediate are the following:

1. Record Hierarchy join
2. Related Record join
3. Any join

In this lesson you wish to retrieve a query that provides a list of employees with their **EmplID**, **Job Code**, **DeptID**, **Name** and **Job Title (Descr)**. The **Personal_Data** record contains the **EmplID** and **Name** fields. The **Job** record contains the **Job Code** and **DeptID** fields, but not the **Descr** field. The **Descr** field is found in the **Jobcode** table. Therefore, it will be necessary to pull the fields from three different tables (**Personal_Data**, **Job** and **Jobcode**) to retrieve the desired query results.

Any Joins and Related Record Joins

Procedure

In this topic you will learn how to create a query that combines fields from three tables/records (**Personal_Data**, **Job** and **Jobcode**) using the two predefined joins **Record Hierarchy** join and a **Related Record** join.

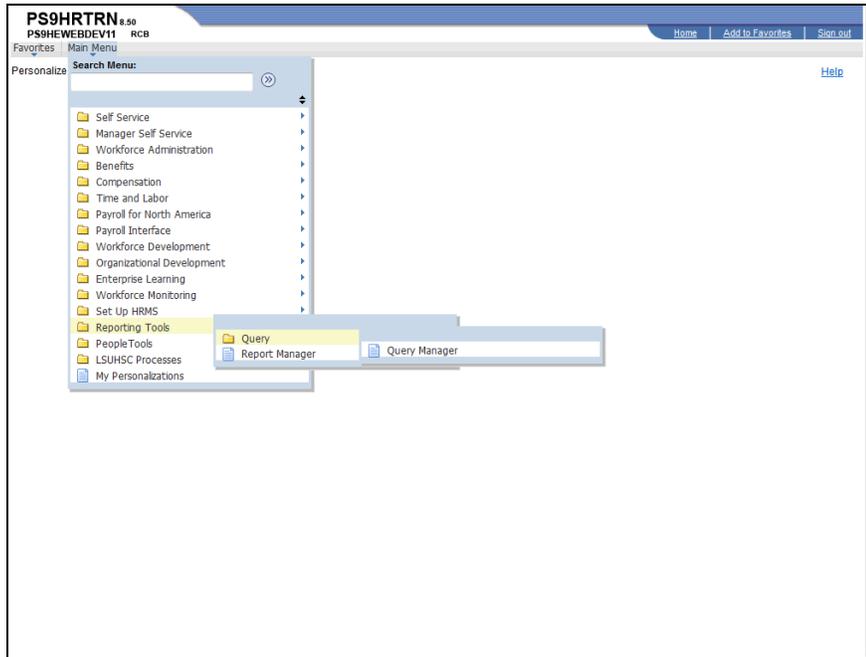
In Query, predefined joins can be generated as a Related Record join. Since these types of joins are predefined, you will not have to add any criteria to manually link the records.

Any Joins gives you the ability to join any record to your currently selected record. Records will be joined on their common high-level keys. If you have an **Any Join**, it will automatically be added to your criteria, unless there is only one row of data in the record to be joined.

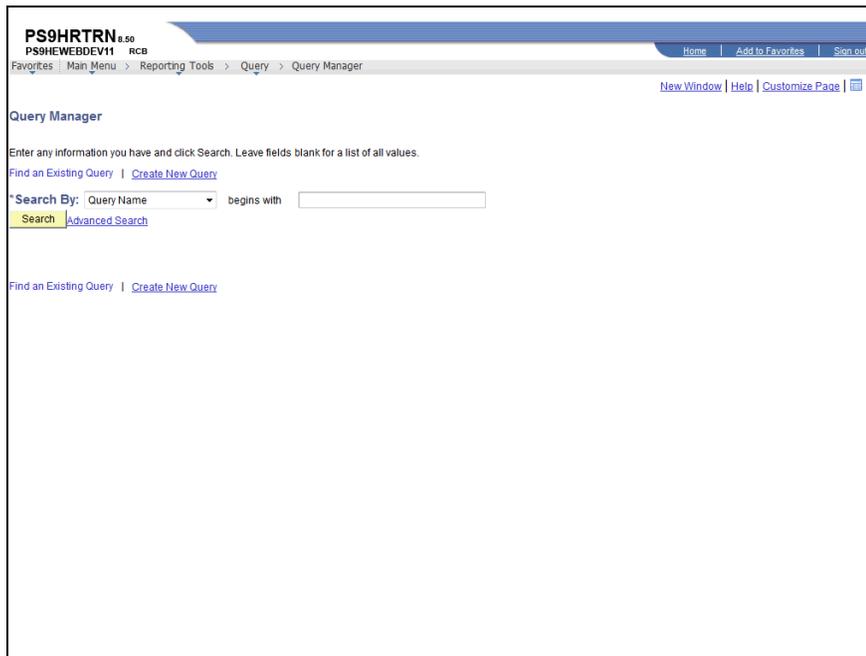
Step	Action
1.	Click the Main Menu button. 
2.	Point to the Reporting Tools menu.
3.	Point to the Query menu.

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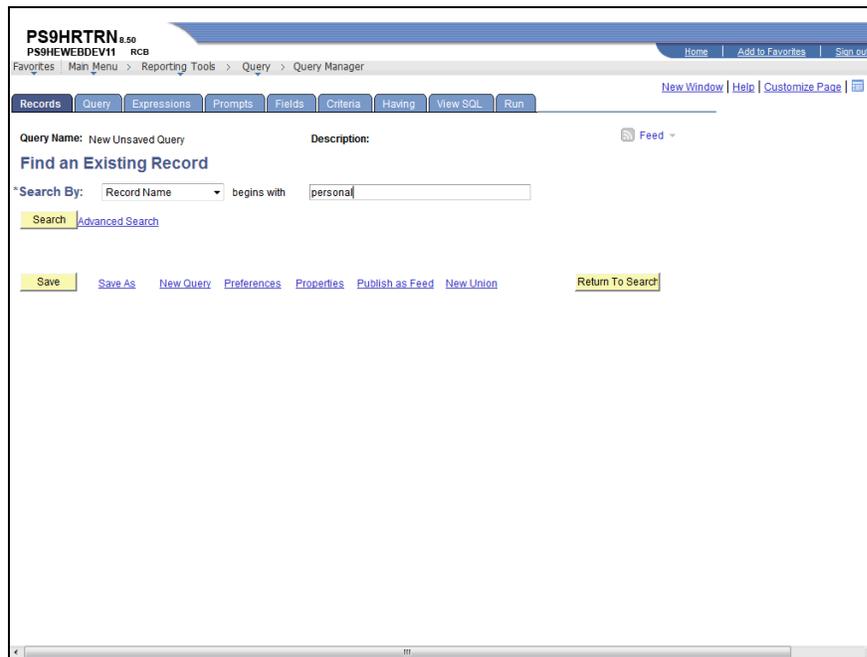
Human Resources Intermediate Query 9.1



Step	Action
4.	Click the Query Manager menu. <div style="border: 1px solid black; padding: 2px; margin-top: 5px;">  Query Manager </div>



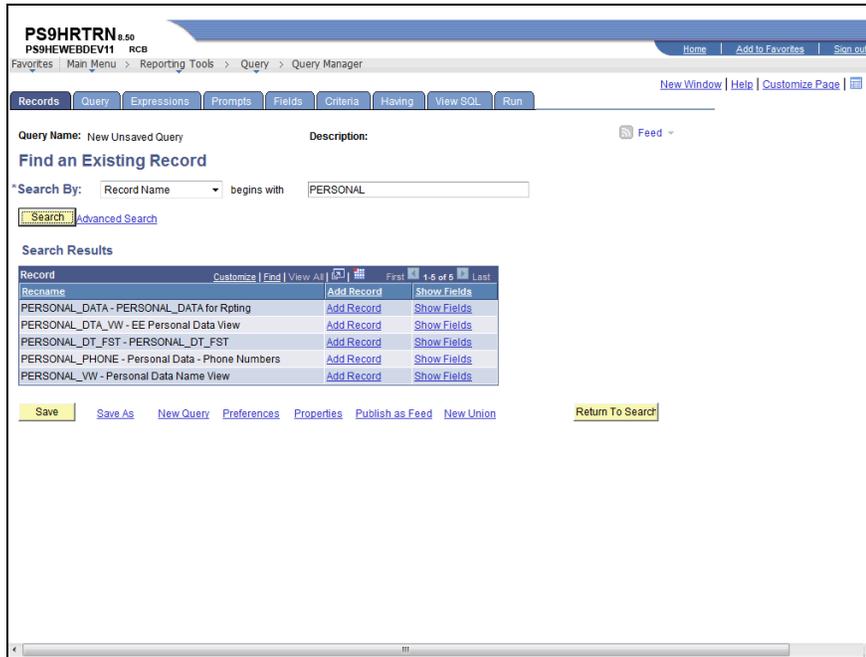
Step	Action
5.	Click the Create New Query link. Create New Query
6.	Enter the desired information into the begins with field. Enter " personal ".



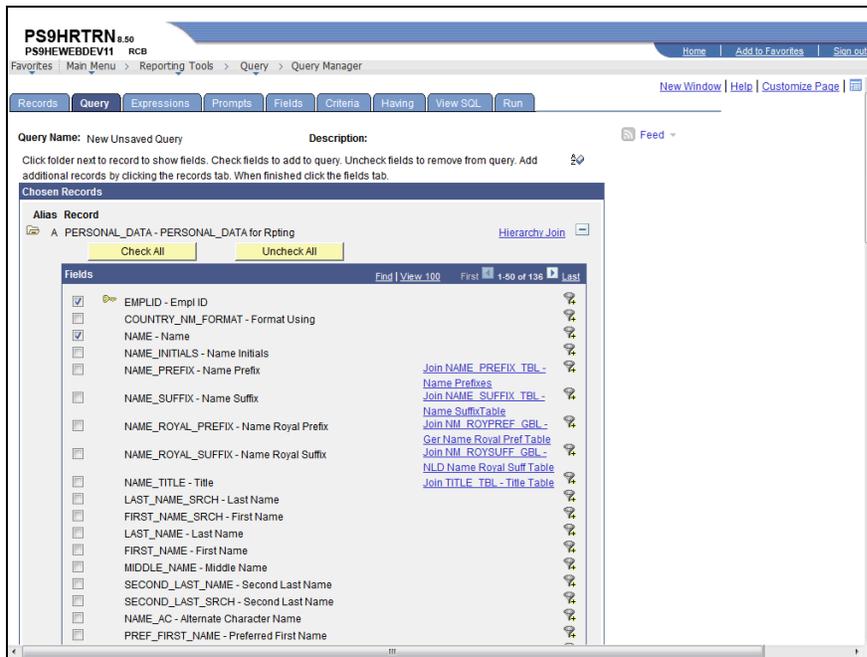
Step	Action
7.	Click the Search button. Search

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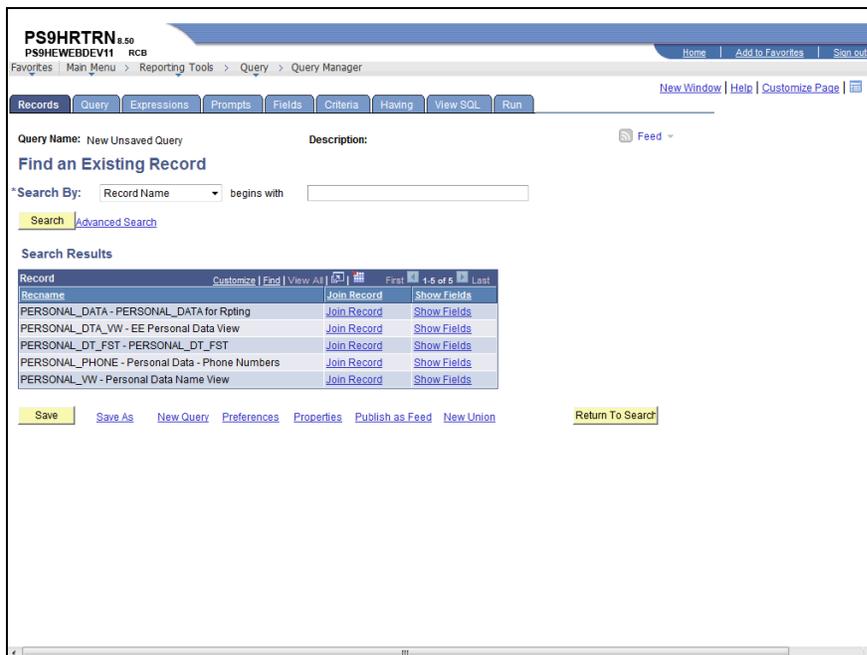
Human Resources Intermediate Query 9.1



Step	Action
8.	Click the Add Record link for the Personal_DATA record. Add Record
9.	Note: Query displays a letter in front of each record or table. This letter is an alias that represents the record or table. When joining records or tables, Query assigns subsequent letters. Click the checkbox EMPLID . <input type="checkbox"/>
10.	Click the checkbox for NAME . <input type="checkbox"/>



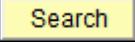
Step	Action
11.	<p>Note: This is an Any join.</p> <p>Click the Records tab.</p> 

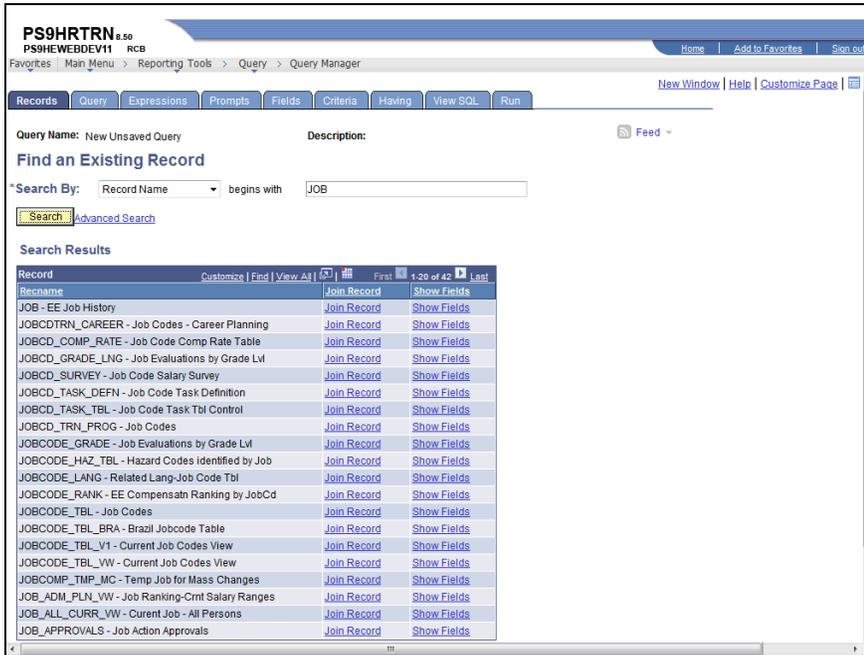


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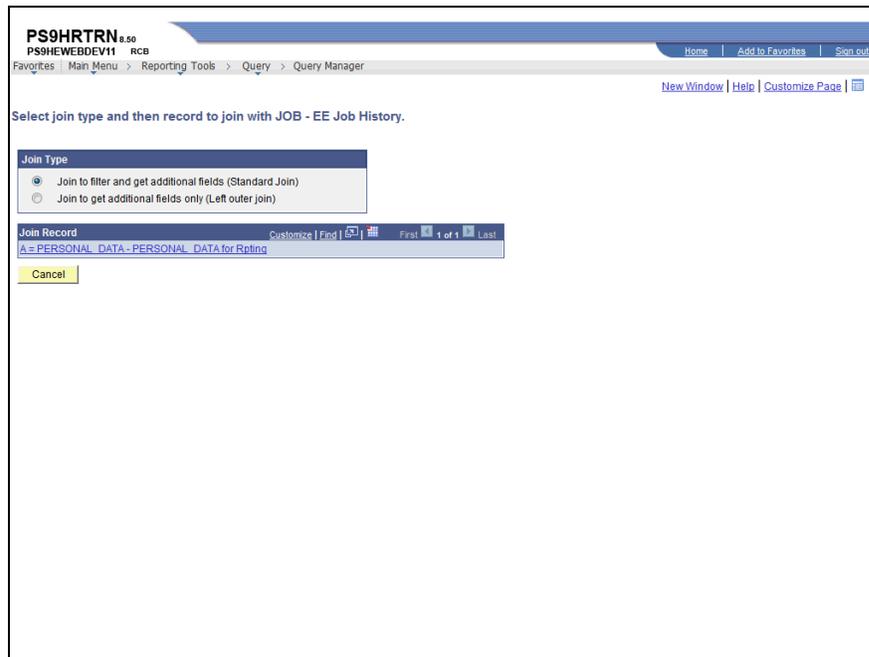
Human Resources Intermediate Query 9.1



Step	Action
12.	Enter the desired information into the begins with field. Enter " job ".
13.	Click the Search button. 



Step	Action
14.	Click Join Record for the JOB - EE Job History. 



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Select join type and then record to join with JOB - EE Job History.

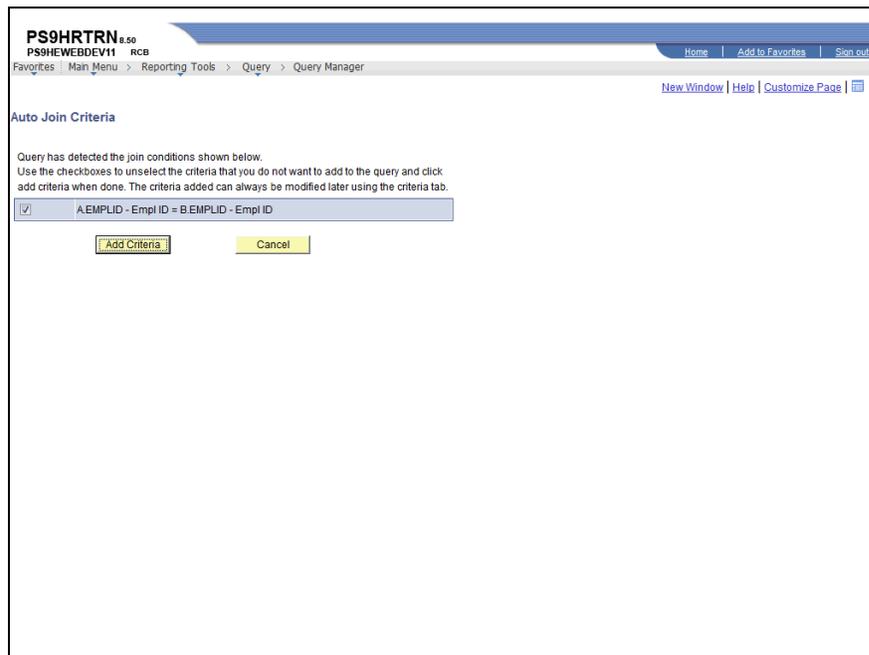
Join Type

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

Join Record Customize | Find |  First 1 of 1 Last

[A = PERSONAL_DATA - PERSONAL_DATA for Rptng](#)

Step	Action
15.	Click the A = PERSONAL_DATA - PERSONAL_DATA for Rptng link. A = PERSONAL_DATA - PERSONAL_DATA for Rptng



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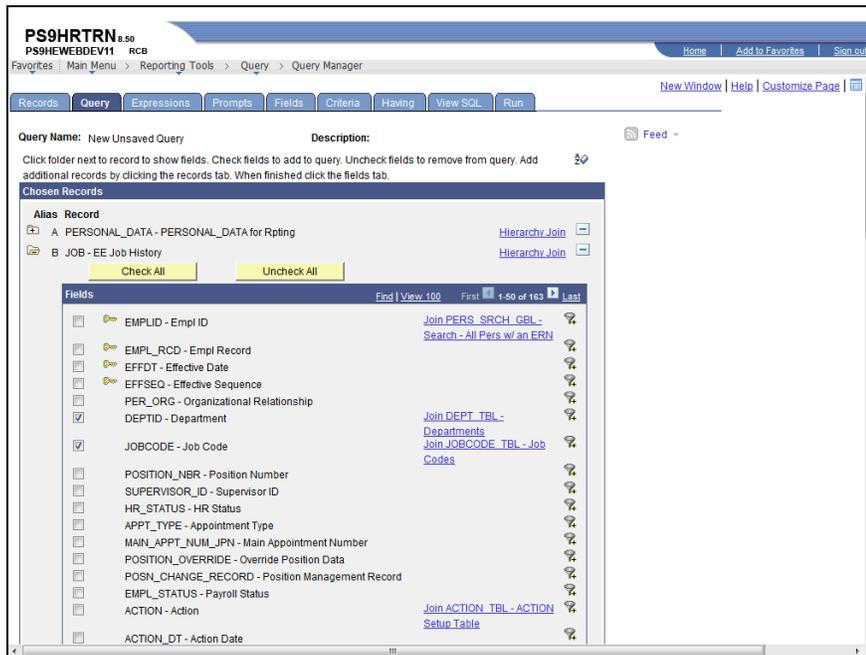
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Auto Join Criteria

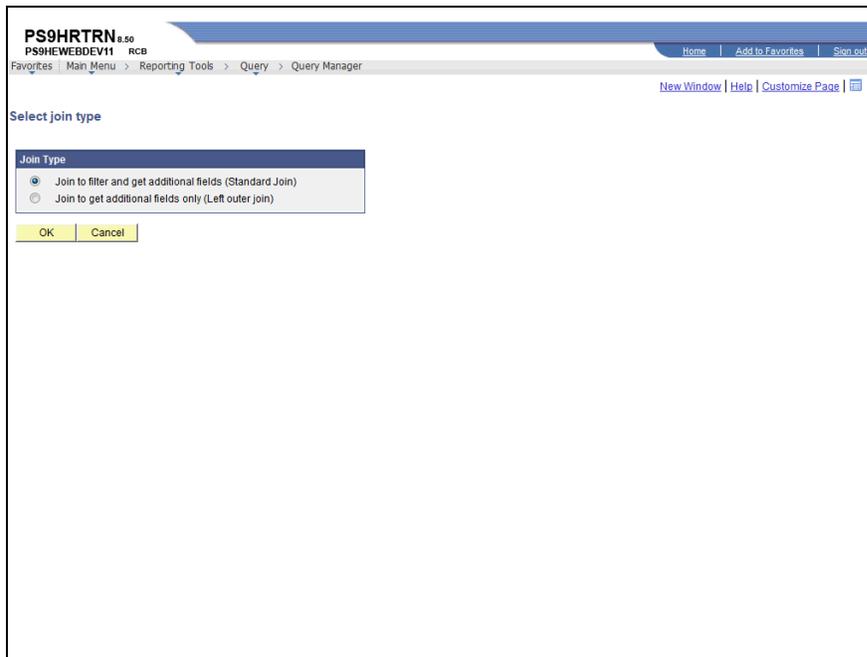
Query has detected the join conditions shown below.
 Use the checkboxes to unselect the criteria that you do not want to add to the query and click add criteria when done. The criteria added can always be modified later using the criteria tab.

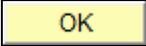
A.EMPLID - Empl ID = B.EMPLID - Empl ID

Step	Action
16.	Note: The Query tool has detected alike fields in both queries. Always select Add Criteria on this screen. Click the Add Criteria button. 
17.	Click the OK button. 
18.	Click the checkbox for DEPTID . 
19.	Click the checkbox for JOBCODE . 



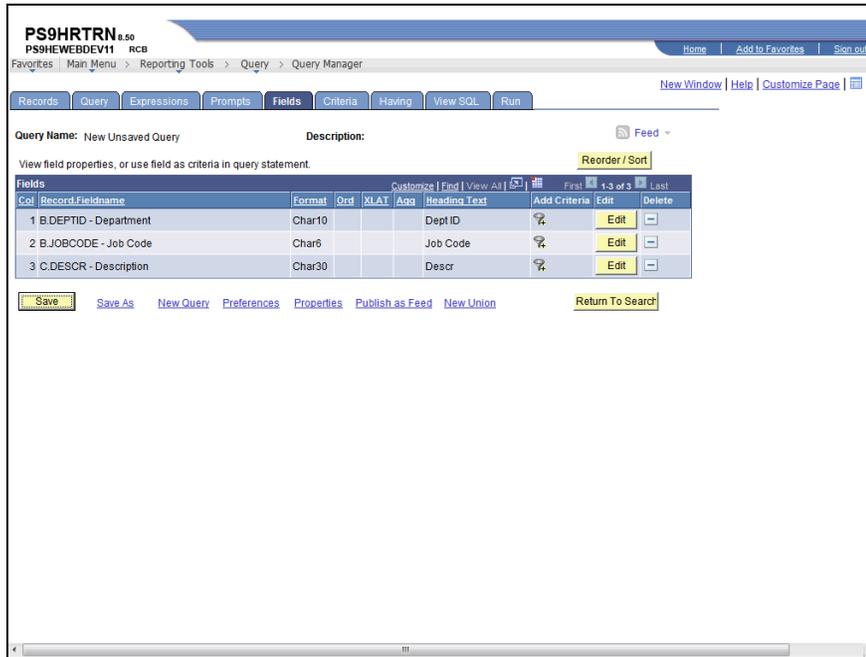
Step	Action
20.	Click the Join JOBCODE_TBL - Job Codes link. Note: This is a Related Record join.



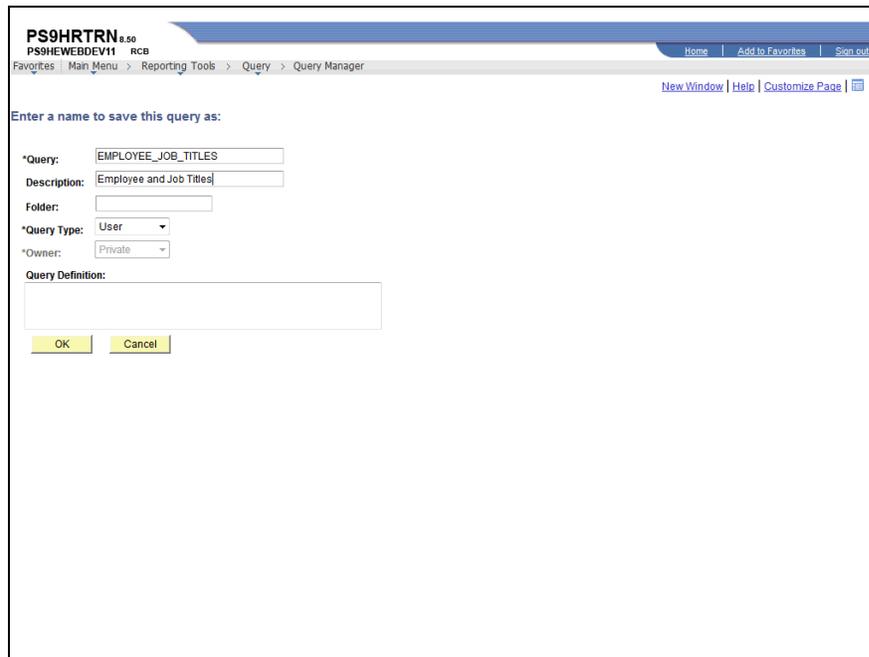
Step	Action
21.	Click the OK button. 
22.	Click the OK button. 
23.	Click the checkbox for DESCR . 
24.	Click the Fields tab. 

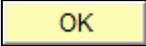
Training Guide

Human Resources Intermediate Query 9.1



Step	Action
25.	<p>Note: Query displays a letter in front of each field. This letter is an alias that represents the record or table from which the field was pulled. When joining records or tables, Query assigns subsequent letters.</p> <p>Click the Save As link.</p> <p>Save As</p>
26.	<p>Enter the desired information into the Query field. Enter "EMPLOYEE_JOB_TITLES".</p>
27.	<p>Enter the desired information into the Description field. Enter "Employee and Job Titles".</p>



Step	Action
28.	Click the OK button. 
29.	Click the Run tab. 
30.	End of Procedure.

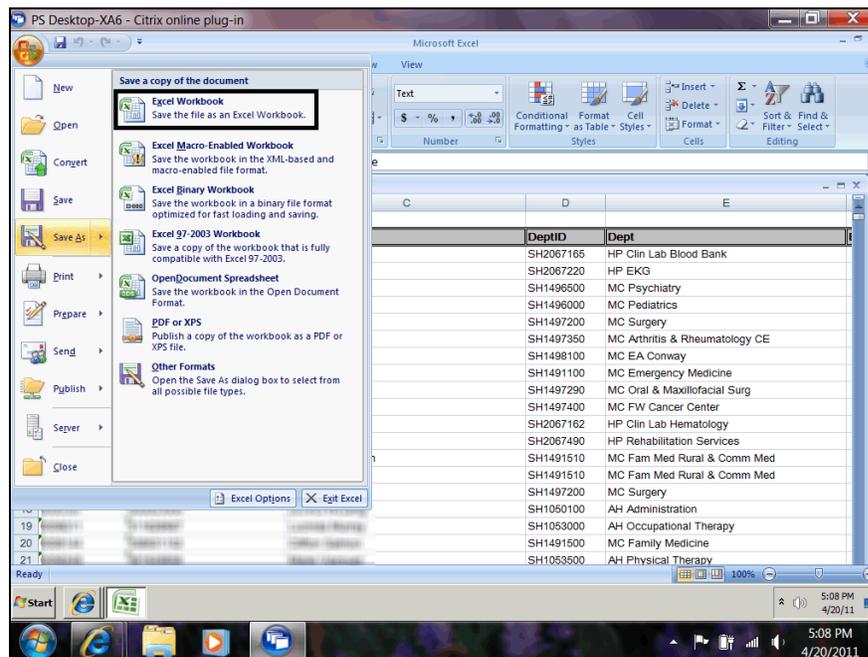
Using Excel to Organize Query Results

Save a Query in Excel

Procedure

In this topic you will learn how to **Save a Query in Excel**.

Step	Action
1.	<p>After exporting your results into an Excel file, you have the option to save the information for future reference.</p> <p>Click the Office Button.</p> 
2.	<p>Click the Save As option.</p> 



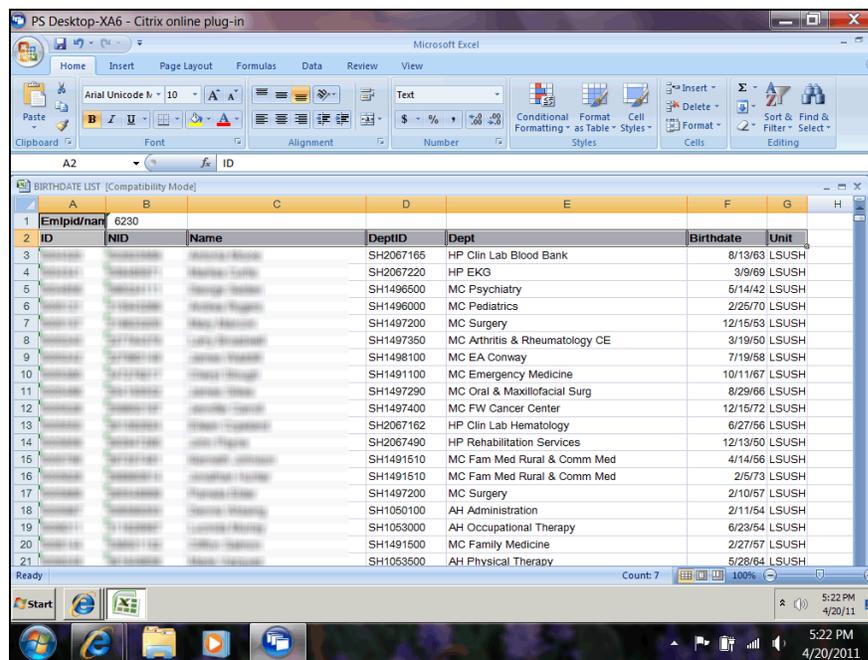
Step	Action
3.	<p>Click the Excel Workbook entry in the list.</p> 
4.	<p>Enter the desired information into the BIRTHDATE LIST field. Enter "BIRTHDATE LIST".</p>

Auto Filter

Procedure

In this topic you will learn how to use **Auto Filter**.

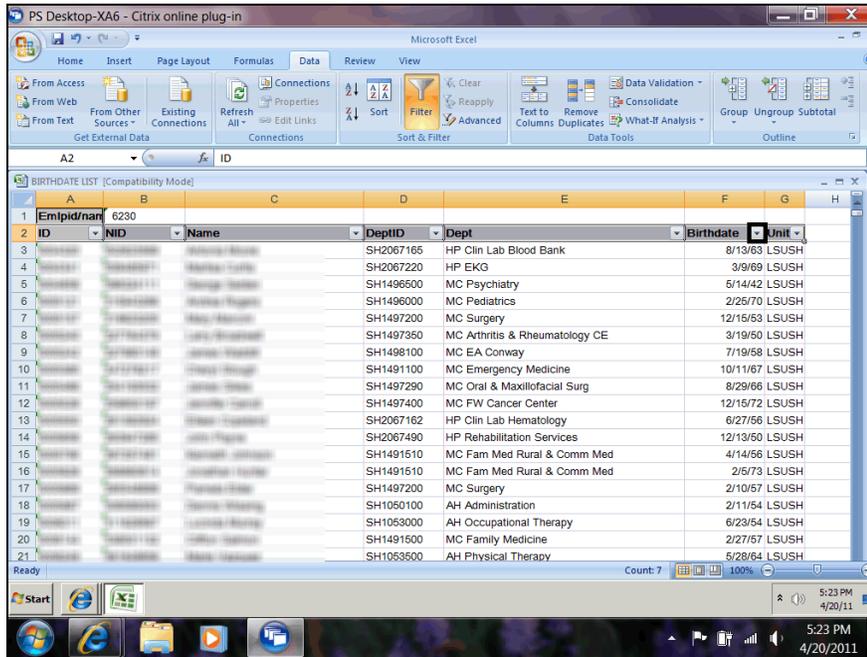
Step	Action
1.	<p>You can use AutoFilter to hide or sort the data in your worksheet.</p> <p>In this example you will filter the data so only employees whose birth year is 1993 will display.</p>

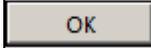


Step	Action
2.	Click the Sort & Filter button.
3.	Click the Filter option.

Training Guide

Human Resources Intermediate Query 9.1



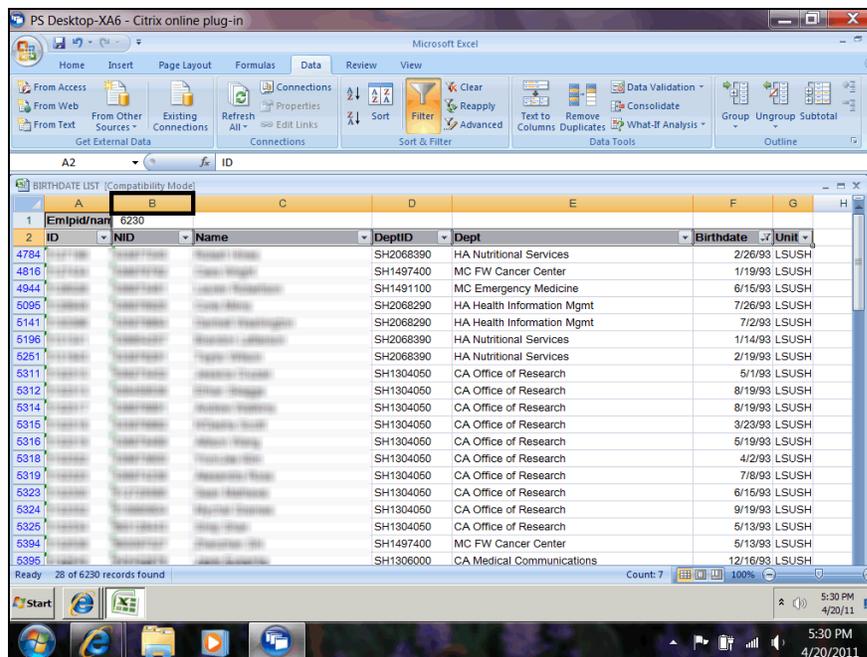
Step	Action
4.	Notice the each column displays a drop-down button. Click the button to the right of the birth date field. 
5.	Click the checkbox to the left of the Select All option to deselect it. 
6.	Click the 1993 option. 
7.	Click the OK button. 
8.	A list of employees who were born in 1993 displays. The filter symbol displays next to the column header to denote that filtering has occurred.
9.	This completes Auto Filter . End of Procedure.

Delete Columns

Procedure

In this topic you will learn how to **Delete Columns**.

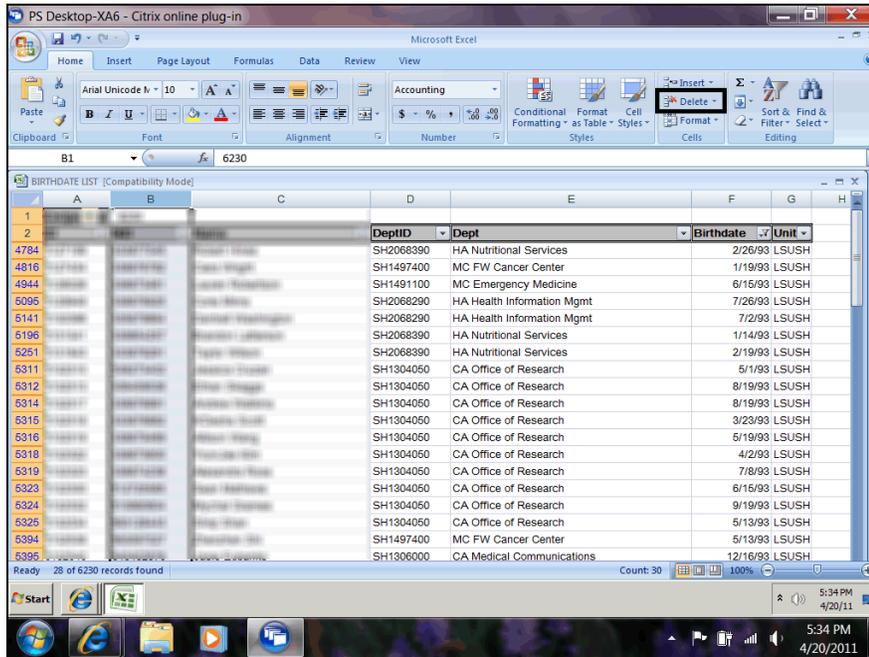
Step	Action
1.	The redefined queries in PeopleSoft 9.1 are very general, therefore, there is information included that is not needed by all users. After running your report you can delete any unrelated columns in Excel.



Step	Action
2.	In this example you will delete the NID column. Click the B column to highlight the entire column.
3.	Click the Home button.

Training Guide

Human Resources Intermediate Query 9.1



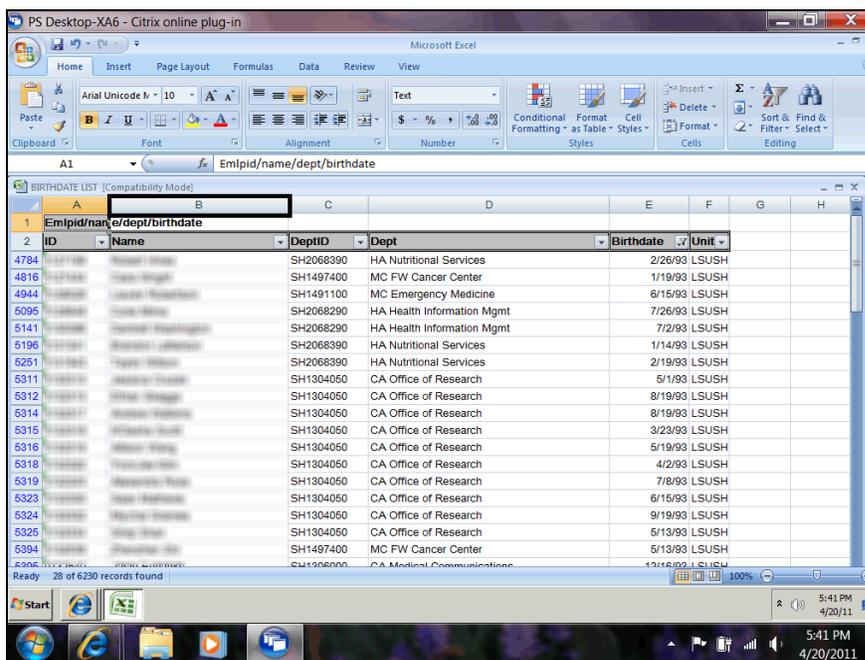
Step	Action
4.	Click the arrow to the right of Delete . 
5.	Click the Delete Sheet Columns list item. 
6.	The NID column is removed from the spreadsheet.
7.	This completes Delete Columns . End of Procedure.

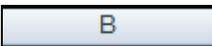
Resize Columns

Procedure

In this topic you will learn how to **Resize Columns**.

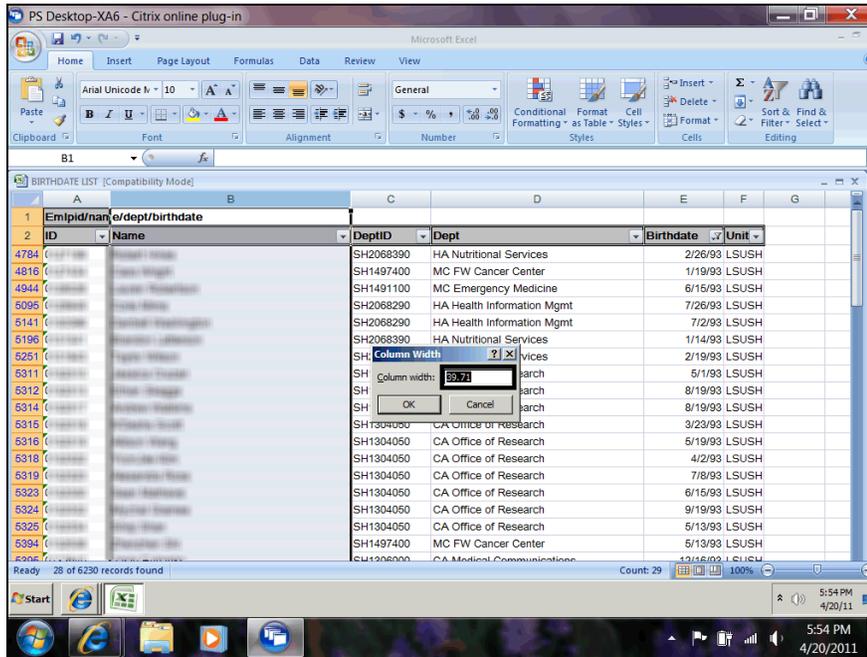
Step	Action
1.	<p>There are two options available for resizing columns:</p> <ol style="list-style-type: none"> 1) Manually enter the appropriate column width, or 2) Utilize the Excel - Auto Fit option. <p>In this example both options will be demonstrated.</p>

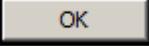


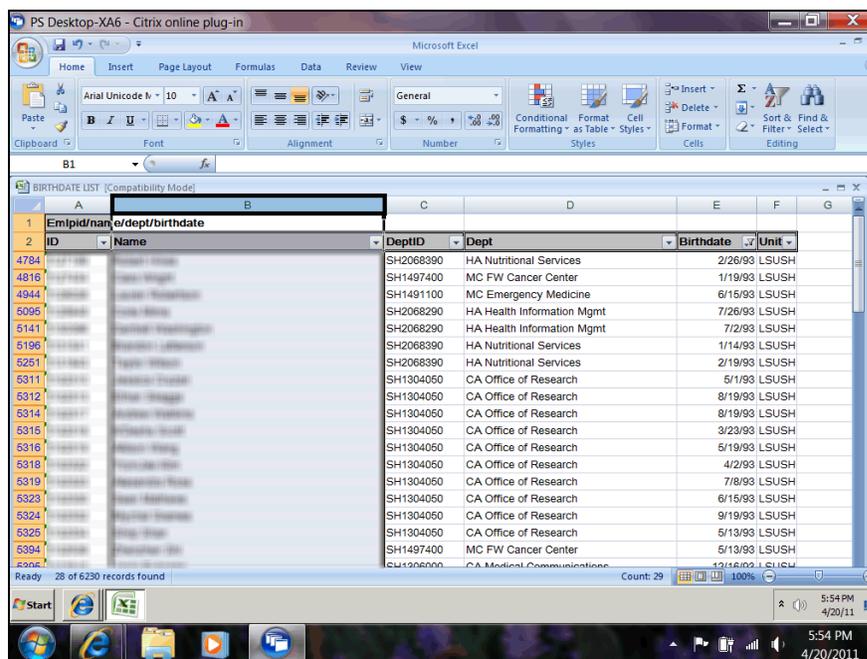
Step	Action
2.	<p>Click the B column to highlight the entire column.</p> 
3.	<p>Click the Format option.</p> 
4.	<p>Click the Column Width list item.</p> 

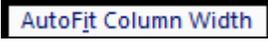
Training Guide

Human Resources Intermediate Query 9.1



Step	Action
5.	<p>Enter the desired column width.</p> <p>Enter the desired information into the Column Width field. Enter "45".</p> <p><i>NOTE: You may have to repeat this option until the column width is correct.</i></p>
6.	<p>Click the OK button.</p> 

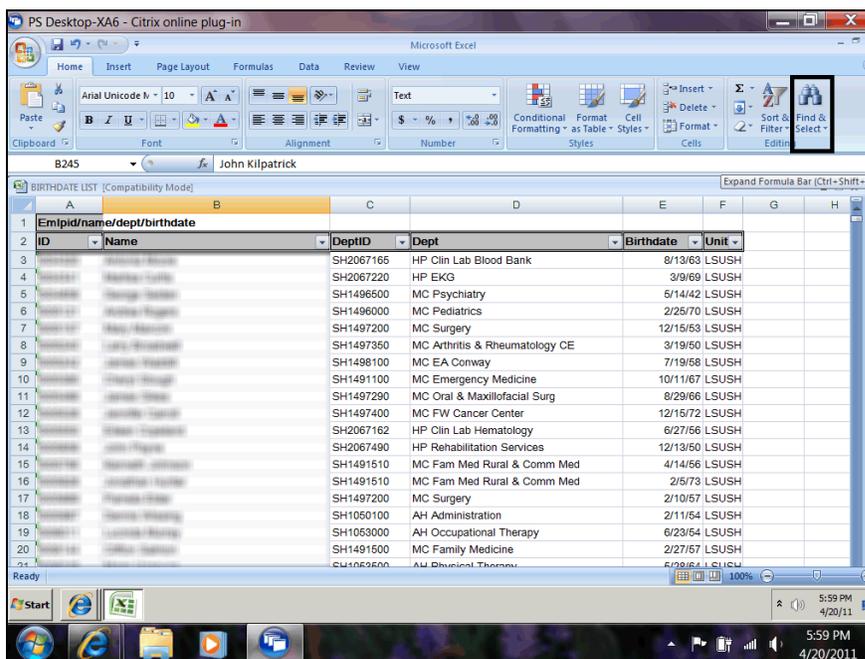


Step	Action
7.	Excel can determine the correct column width for you by using the Autofit option. Click the Column Heading you wish to resize. 
8.	Click the Format button. 
9.	Click the AutoFit Column Width list item. 
10.	The system automatically resized column B.
11.	This completes Resize Columns . End of Procedure.

Find

Procedure

In this topic you will learn how to use **Find**.

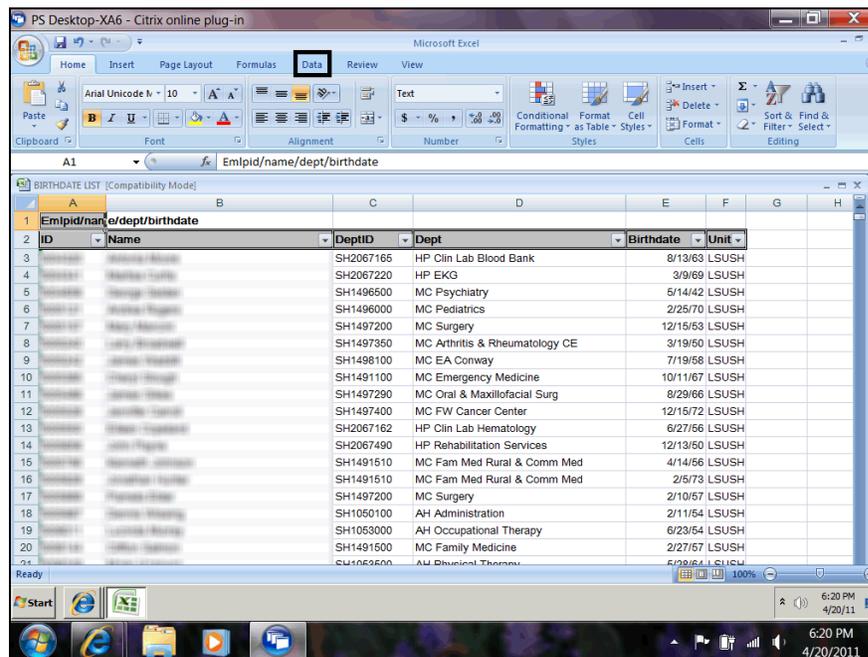


Step	Action
1.	In this example you will find employee names that contain "John". Click the Find & Select button.
2.	Click the Find option. 
3.	Enter the desired information into the Find what: field. Enter " John ".
4.	Click the Find Next button. 
5.	The system will take you to the first name containing "John". In this example the system will not differentiate between first names and last names containing "John". You will click the Find Next button to search for the next employee name.
6.	This completes Find . End of Procedure.

Sort Using Multiple Criteria

Procedure

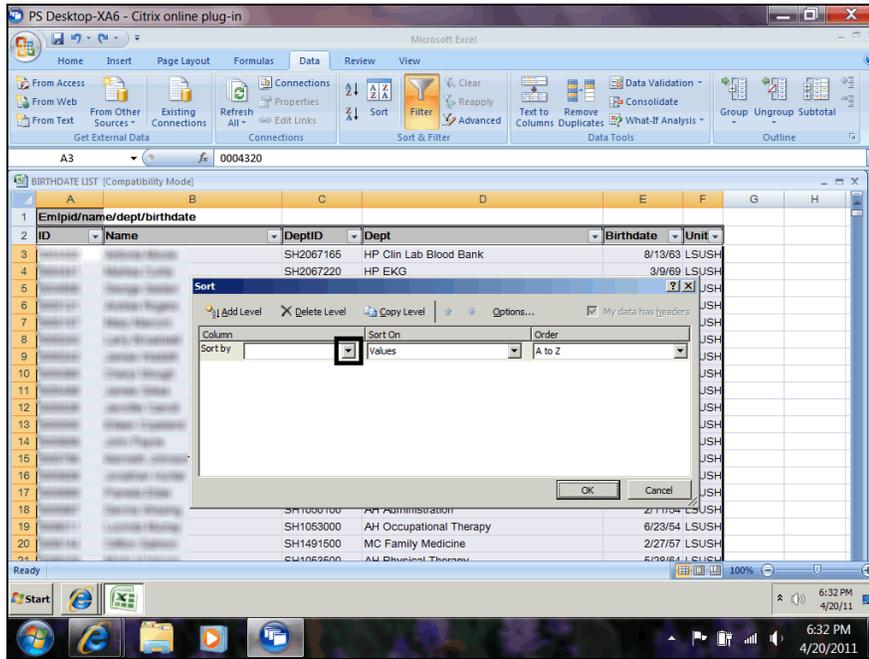
In this lesson you will learn how to **Sort Using Multiple Criteria**.



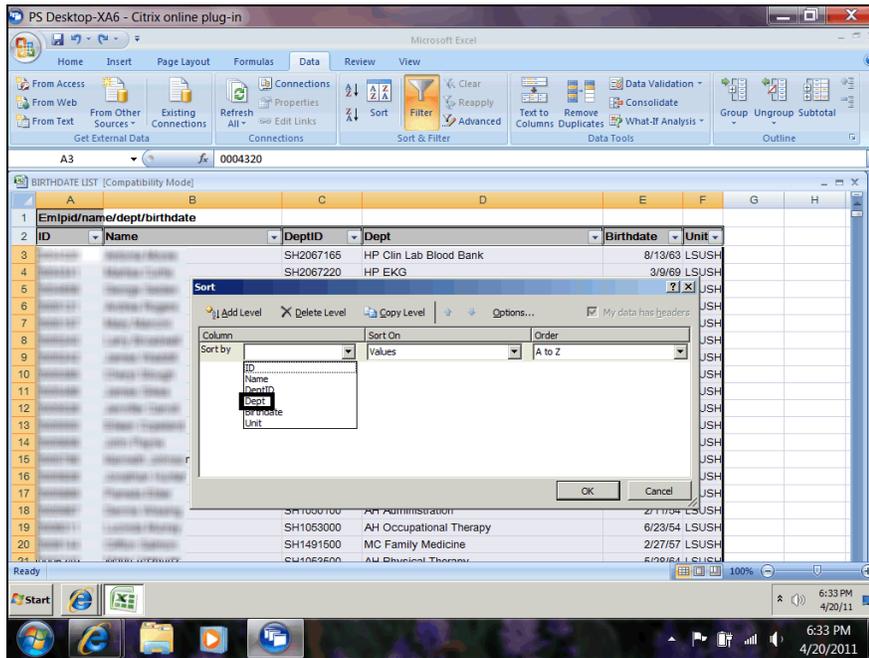
Step	Action
1.	Click the Data button. 
2.	Click the Sort button.

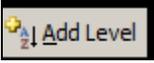
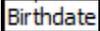
Training Guide

Human Resources Intermediate Query 9.1



Step	Action
3.	Click the button to the right of the Sort by field to define the first level of sort. 

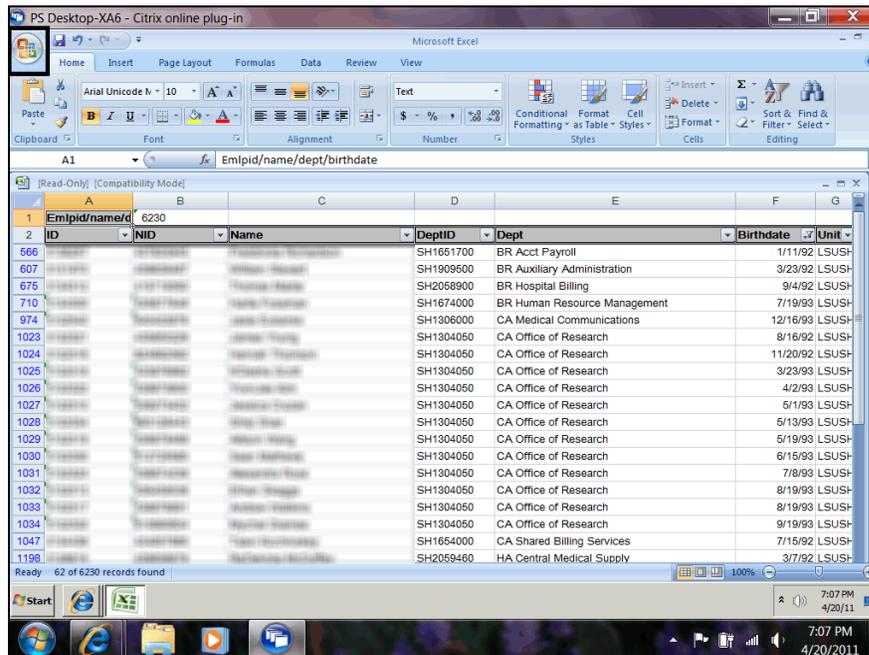


Step	Action
4.	Click the Dept list item. 
5.	Click the Add Level option. 
6.	Click the button to the right of the Then By field. 
7.	Click the birth date list item. 
8.	Click the OK button. 
9.	The system displays the sorted data.
10.	This completes Sort Using Multiple Criteria . End of Procedure.

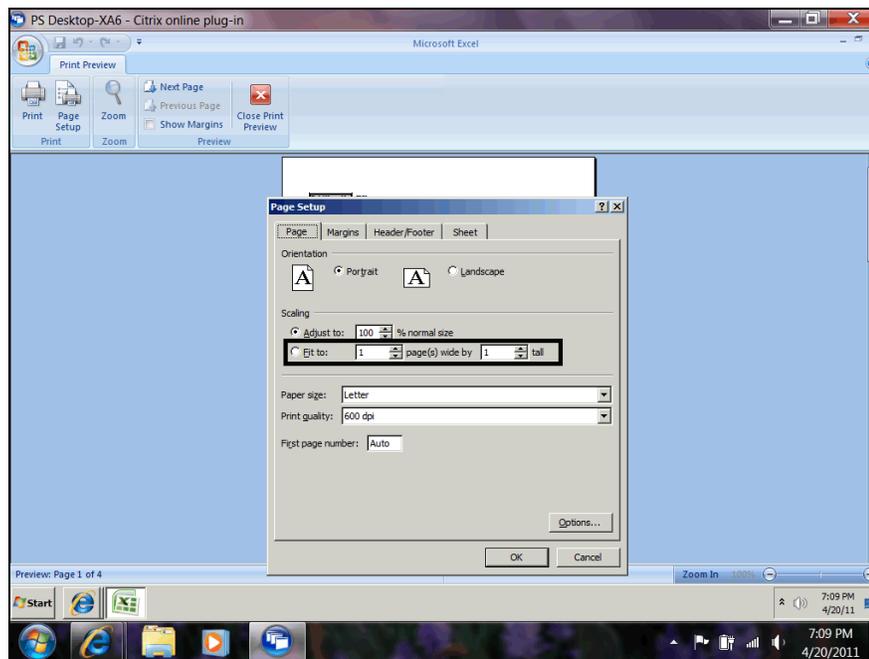
Print Results on One Page

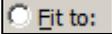
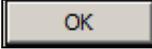
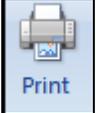
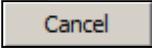
Procedure

In this lesson you will learn how to **Print Results on One Page**.



Step	Action
1.	Click the Office Button . 
2.	Click the Print list item. 
3.	Click the Print Preview list item. 
4.	Click the Page Setup button.



Step	Action
5.	Click the Fit to: option. 
6.	Click the OK button. 
7.	Click the Print button. 
8.	For training purposes only , click the Cancel button. 
9.	This completes Print Results on One Page . End of Procedure.