

QUERY MANAGER HCM

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10/12/17

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Session Topics

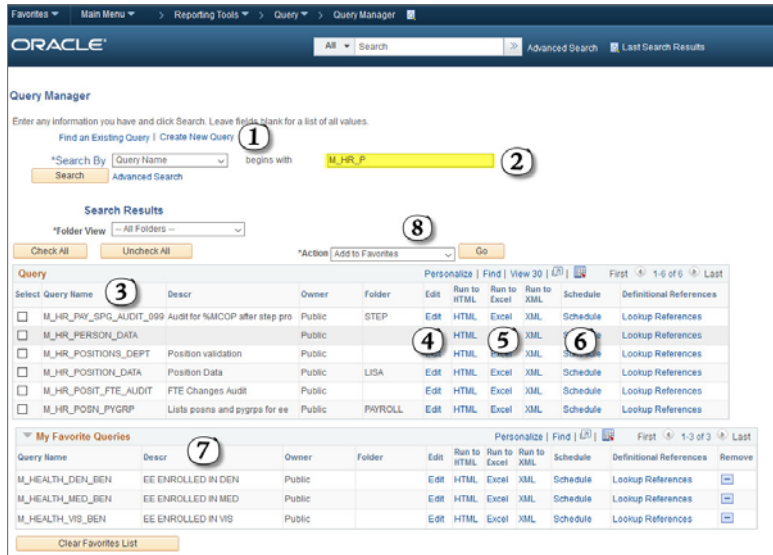
- Welcome & Introductions (5 min)
- Explanation of the Query Manager HCM Pilot (5 min)
- Demo of Query Manager HCM (15 min)
- Guest speakers: “Our Experience with the Pilot” (10 min)
 - Ernie Garcia Hernandez, Fallbrook Elementary
 - Mary Thibodeau, Escondido Elementary
- Discussion (20 min)
 - What kinds of HCM queries are you hoping to edit/create?
 - How will you validate your queries for accuracy?
 - Who should be a “Q” user within your organization?
 - What ideas do you have for managing requests, workflow, and communicating new queries to your users?
- Wrap up & Closing (5 min)
 - Training Opportunities

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Query Manager Screen



KEY AREAS OF SCREEN:

1. Create a new query
2. Search for a query using the basic or advanced search functions
3. View search results
4. Edit a query
5. Run a query as HTML or Excel (which displays results in a new browser tab or window)
6. Schedule a query
7. Access Favorite queries
8. Copy a query to other users and take other actions

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Query Manager users have a second “Q” ID



123456

- Log in with your six-digit ID (123456) as usual to perform tasks.

123456Q – Your “Q” ID

- Log in with your “Q” ID (123456Q) to use Query Manager to edit/create queries.
- You will only have access to Query Manager with this login. You cannot do your regular work with this ID.
- You will have a limited # of records (tables).
 - This is because only a portion of the records are secured (which limit you from seeing other districts’ data).
 - This means you will not be able to find all queries that you can find with your regular login.

About the Pilot (October 2017)

15 people from 8 organizations are piloting Query Manager HCM in Sandbox:

1. Escondido Elementary
2. Fallbrook Elementary
3. Grossmont
4. La Mesa-Spring Valley
5. MiraCosta College
6. Poway
7. SDCOE
8. Solana Beach

Pilot participants have committed to spending time after training to practice in the system so they can provide feedback.

TRAINING - Monday, October 2

- Learn how to edit/create queries in HCM

"TESTING" - October 2-20

- Back at site, create/edit at least 5-10 queries in Sandbox
- 3 guiding questions:
 - Is there anything we could have spent more time in on training that would have helped you be more successful?
 - Did you find any instances that you could access other districts' data?
 - Which types of queries do you find that you can and cannot create/edit based on the number of records provisioned?

REPORT OUT - Friday, October 20

- Share experiences, findings, challenges, etc. on a GoToMeeting on 10/20/17 from 11:00 am - 12:00 pm

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What did pilot participants learn in training?

Pilot participants learned how to:

- Create HCM queries using Query Manager
- Edit HCM queries by:
 - Adding a field from an existing Record
 - Adding a Prompt
 - And formatting the query to return the data set how you please
- Rename and save queries as favorites
- Share a query

Back at work, pilot participants are spending time practicing in Sandbox so they can provide feedback.

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DEMO

How to use Query Manager (“Q” login) to create a query

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Records (Tables)

Queries are driven by data that is located in tables. Within the tables are fields that are used to return the requested data. Below is a list of commonly used records.

- JOB – EE Job History
- NAMES – Person Names
- POSITION_DATA – Position Data
- PAYROLL_DATA – EE Paycheck Delivery Data
- PERSONAL_DATA – PERSONAL_DATA for Rpting
- DEPENDENT_BENEF – EE Dependents/Beneficiaries

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GUEST SPEAKERS (10 MIN): “OUR EXPERIENCE WITH THE PILOT”

Ernie Garcia Hernandez, Fallbrook Elementary
Mary Thibodeau, Escondido Elementary

Terms & Conditions

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1. In order to be a user of Query Manager **you must have experience with Excel and database structure** (tables, fields, criteria, joins, etc.).
2. In order to be assigned the M_QUERY_MANAGER_DISTRICT role that grants access to Query Manager, **you must be trained in the use of Query Manager** by the SDCOE Customer Resource Center and/or cross-trained by another staff member within your organization.
3. You will not have permissions to alter an existing public query (M_ or FAR_ for example).
4. You may find an existing public query (M_ or FAR_ for example) and/or create a new query and save it as your own private query. You may share your private query with other users (employees) within your organization.
5. Not all queries available to you under your regular ID are available under your “Q” Query ID.
6. You may schedule a private query to run daily/weekly. Do not schedule a query to run hourly.
7. You may schedule a private query to distribute to other users or email addresses.
8. Use Query Manager at your own risk. It is recommended that you incorporate a process to test and validate a query to confirm that the returned results are accurate.
9. If you create and/or schedule a query that impacts PeopleSoft system performance, the SDCOE reserves the right to remove your access to Query Manager.
10. The SDCOE will not support or troubleshoot a query that you or any district user creates. Only M_ and FAR_ queries are supported and maintained.
11. There are two reasons to submit a HEAT ticket regarding Query Manager:
 - a. Primary contact. To request that a user is given the M_QUERY_MANAGER_DISTRICT role with a confirmation that the user has received training (see Item 2).
 - b. To request that the CRC uses the Query Administration tool to end a query that is not running to success.

DISCUSSION (20 MIN)

What kinds of HCM queries are you hoping to edit/create?
How will you validate your queries for accuracy?
Who should be a “Q” user within your organization?
What ideas do you have for managing requests, workflow, and communicating new queries to your users?

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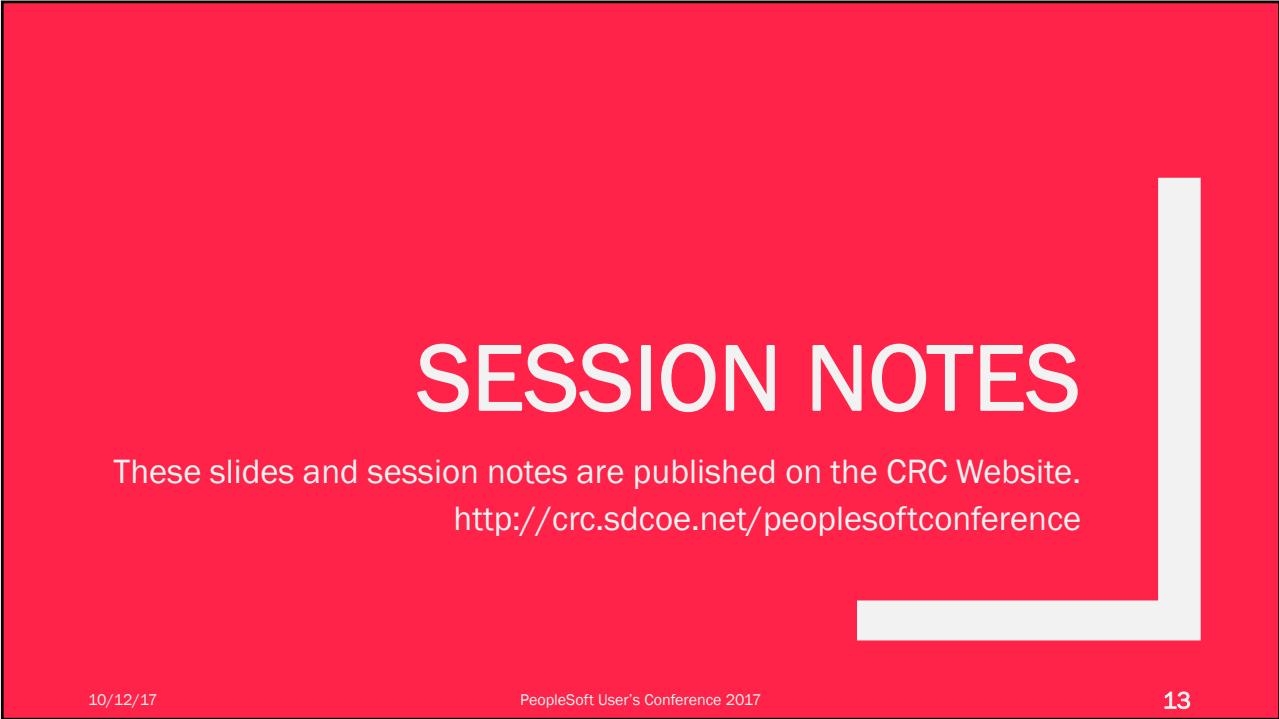
Training Opportunities

- Query Manager HCM “QY3” training dates are still being identified and will be dependent on the results of the October 2017 pilot.
- The CRC will send an announcement when QY3 training dates are available.
- Registration will be in GSMU at <https://sdcoe.gosignmeup.com>.
- Once training is rolled out, we will follow this schedule:
 - Query Manager HCM “QY3” training will be offered quarterly
 - Query Manager HCM Workshops will be offered 2x per year (Summer, Winter)

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SESSION NOTES

These slides and session notes are published on the CRC Website.
<http://crc.sdcoe.net/peoplesoftconference>

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