PeopleSoft Training Activity Sheet

QY3 QUERY MANAGER HCM

For use in training. Last updated April 2, 2018.

During this training, we will use guided instruction to complete Activities 1-7.

You will be asked to complete Activity 8 independently at the end of class.

The navigation for all activities is **Main Menu > Reporting Tools > Query > Query Manager**.

Activities

Activity 1: Create a New Query

WHAT YOU SHOULD BE ABLE TO DO	▪ **RECORDS TAB:** Add a record (table) ▪ **QUERY TAB:** Add fields from a record. ▪ **RUN TAB:** Execute a query

Scenario: You want to create a query that provides a listing of all the employees mailing information.

Fields to include:

- Last Name
- First Name
- Address (Street, City, State, Postal Code)

Refer to p.17 in the QY3 Query Manager HCM v1.0 guide.

Navigation: Main Menu > Reporting Tools > Query > Query Manager

Directions:

1. Click on the **Create a New Query** link. We will be taken to the **Records** tab.
2. Search for Record Name: *PERSONAL_DATA*
3. Click the **Show Fields** link to view the fields provided by the record. Click **Return**.
4. Click **Add Record**. We will be taken to the **Query** tab.
5. Within the PERSONAL_DATA record, check the boxes for the Fields:
   - LAST_NAME - Last Name
   - FIRST_NAME - First Name
   - ADDRESS1 - Address Line 1
   - ADDRESS2 - Address Line 2
   - CITY - City
   - STATE - State
   - POSTAL - Postal Code

   ***Note:** A key icon beside a field means it is the database record's key field, for example the "key" to the PERSONAL_DATA table is the EMPLID field.*
6. Click on the **Run** tab to execute the query and see results.
7. Click on any of the tabs (Example: **Fields** – you cannot **Save** from the **Run** tab) and click **Save**.
8. Save the Query as: XX(your initials)_HR_EE_ADDRESS, then click **OK** to save.
9. Click on the **SQL** tab to see how Query Manager converted the information from the other tabs (**Query**, **Prompts**, **Fields**, and **Criteria**) into Structured Query Language (SQL) that gets executed when you **Run** the query.
10. Click **Return To Search** to go back to the Query Manager screen.

Activity 2: Add a Field (Existing Record)

WHAT YOU SHOULD BE ABLE TO DO	
	▪ **QUERY TAB:** Add a field from an existing record (table) ▪ **FIELDS TAB:** Use Reorder/Sort to place a field in a particular column ▪ **FIELDS TAB:** Use Reorder/Sort to sort the results in a particular order

Scenario: You want to add fields for Position **Description, Regular/Temporary,** and **Full/Part Time** to query *QM_PY_JOB_INFO.* This is a simple modification where you add fields from an existing record already used in the query. Place the **DESCR - Description** field after the **POSITION_NBR - Position Number** field. Place the **REG_TEMP – Regular Temporary** and **FULL_TEMP – Full/Part Time** fields after the **EMPL_STATUS – Payroll Status** field.

Refer to p.25 in the QY3 Query Manager HCM v1.0 guide.

Directions:

1. Navigate to **Query Manager**. Search for query *QM_PY_JOB_INFO.*
2. Click the **Edit** link for the query.
3. Click the **Run** tab. Enter your District. Review the query results. Record how many rows are returned. ____
4. Click the **Query** tab.
   - There are various records being used. How many? ______
   - Note the letters in front of the Record.
5. Click the **Fields** tab. These are all of the fields in the query.
   - See A, B, and C in front of the Fieldnames? What are they used for? ____
   - Which field # is **POSITION_NBR – Position Number**? ______
   - Which record does **POSITION_NBR – Position Number** pull from? Write the Alias. ______
6. Go to the **Query** tab. Click the **Expand All Records** button located near the bottom. Find the **DESCR – Description** field for Position.
   - Which Record was the **DESCR - Description** field in? ____________________
   - Click the box for the field. This adds it to the query.
   - Which Record are the **REG_TEMP – Regular/Temporary** and **FULL_PART_TIME – Full/Part Time** fields in? ____________________
   - Click the box for both fields. This adds both to the query.

     Tip: You can press Ctrl + F and use the browser's search feature to find fields.
7. Go to the **Fields** tab.
   - Where do the fields you just added appear by default? _______________________________
   - Now we have to arrange the fields. Click **Reorder/Sort** button at the top of the screen. Use the left side to arrange the order of the fields/columns. What # should you enter for **Description** to make it appear to the right of **Position Number**? ______ What # will you enter for **Regular/Temporary** to have it appear after the **Payroll Status** field?_______ What # will you enter for **Full/Part Time** to make it appear after **Regular/Temporary**?_______
   - Click **OK** to save the Reorder/Sort changes.

8. Click the **Run** tab to run the query. Notice we haven't saved the query yet.
   - Verify the output matches what you expected.
   - How are the query results sorted? ____
   - Let's modify the query to sort by **Display Name**.
9. Click the **Fields** tab. Click **Reorder/Sort**.
   - Use the right side to change the sort order of the results.
   - How will you make the query sort by **Display Name**? ______________________________
   - Click **OK** to save the Reorder/Sort changes.
10. Click the **Run** tab to run the query.
    - Verify the output matches what you expected.
11. Click on any of the tabs (Example: **Fields**) and click **Save**.
12. Save the query as your own. Example: XX(initials)_PY_JOB_INFO, then click **OK** to save.
13. Click **Return To Search** to go back to the Query Manager screen.

Activity 3: Add Criteria

WHAT YOU SHOULD BE ABLE TO DO	▪ **FIELDS TAB:** Add criteria. You can add criteria from the **Criteria**, **Fields**, and **Query** tabs. Adding criteria from a field (it doesn't have to be a field in the query) skips having to fill out Expression 1.

Scenario: We are going to observe the difference between the results returned before removing **Criteria** for **Name_Type** and the results returned after we remove **Criteria** for **Name_Type**.

Refer to p.31 in the QY3 Query Manager HCM v1.0 guide.

Directions:

1. Navigate to **Query Manager**: Find M_PY_JOB_INFO and click the **Edit** link.
2. Run the M_PY_JOB_INFO query. Note the number of rows returned. _________
3. Click **Download to Excel**.
4. Filter by an employee with multiple **Empl Record** numbers.
5. Go back to Query Manager. Click on the **Criteria** tab**.**
6. Add Criteria (**B.NAME_TYPE – Type of Name equal to PRI**) by clicking on the Add Criteria button.
7. Click the look-up tool for **Expression 1**.
8. Click the **Show Fields** button for the **Names** record.
9. Click on the field **NAME_TYPE –Type of Name**.
10. Click the look-up tool for the **Constan**t field under **Expression 2**.
11. Click the look-up tool for the **Type of Name** field.
12. Click the link for **PRI** for **Name Type**, **Primary**.
13. Click the **OK** button. Notice **PRI** is populated in the **Constant** field.

14. Click the **OK** button again.
15. You can view the added criteria in the **Criteria** tab.
16. Run the query again. Note the number of rows returned. __________
17. Click **Download to Excel**.
18. Filter by the same **ID** in both Excel files.
19. What did you notice? ____
20. Close both Excel spreadsheets without saving.
21. Click on any of the tabs (Example: **Fields**) and click **Return To Search**. This query does not need to be saved. On the *Discard current query?* message box click **Yes** to return to the Query Manager screen without saving any of your changes.

Note: When using the **NAMES** Record, always enter Criteria for **NAME_TYPE – Type of Name equal to PRI**. This will prevent unnecessary duplicate rows from returning in your results.

Activity 4A: Add a Record to an Existing Query

WHAT YOU SHOULD BE ABLE TO DO	▪ **RECORDS TAB:** Add a record. ▪ **RECORDS TAB:** Use a Left Outer Join. ▪ **QUERY TAB:** Add fields from a record. ▪ **FIELDS/CRITERIA TAB:** Add criteria to a query. ▪ **RUN TAB:** Execute a query.

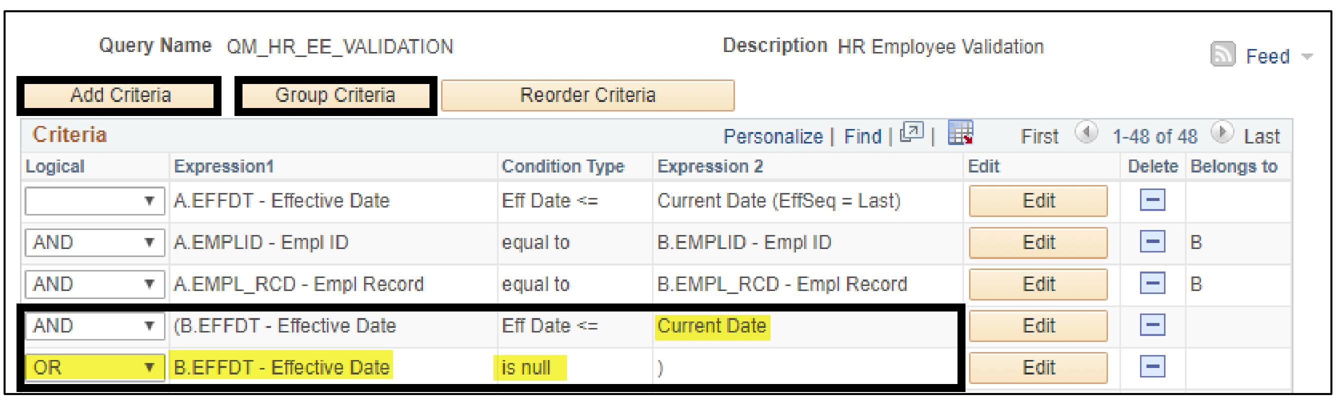
Scenario: The M_HR_POSITION_DATA query provides what position the employee Reports To but does not include a description for that position. Add this field and place it to the right of the Reports To column. This will involve using a Left Outer Join to join a record that includes a key field for Effective Date. There is an additional criteria to add when doing so.

Refer to p.49 in the QY3 Query Manager HCM v1.0 guide, for the steps to take to add the Effective Date criteria.

Directions:

1. Search for the M_HR_POSITION_DATA query.
2. Click on the **Edit** link for the M_HR_POSITION_DATA query.
3. Run the query to view the results. How many records are returned? ____________
4. Click on **Records** tab.
5. Search for the Record **POSITION_DATA**.
6. Click on the **Show Fields** link for POSITION_DATA. Notice there is a field contained in this record for **REPORTS_TO – Reports To Position Number**. Hint: 20th field on the list.
7. Close the Fields window or click on the **Return** button.
8. Click on the **Join Record** link for **POSITION_DATA**.
9. For Join Type, select **Join to get additional fields only (Left Outer Join)**.
10. Click on **Record A = POSITION_DATA**.
11. An Auto Join Criteria message box will appear. Click the **Add Criteria** button.

12. Click the **OK** button in the message box stating, “An effective date criteria has been automatically added…”
13. You will be taken to the **Query** tab.
14. The **POSITION_DATA** record will be expanded revealing the fields.
15. Select the **DESCR - Description** field.
16. Place the field next to the Reports To field.
17. Click the **Run** tab.
18. How many rows were returned? _______________
19. We want to populate the column you just added with the description for the Reports To position rather than the position.
20. Remember the Auto Join Criteria message box? Click on the **Criteria** tab to view what was added.
21. The Criteria, **A. POSITION_NBR – Position Number equal to E. POSITION_NBR –Position Number**, is pointing Record E to the field in Record A returning the same position number. This needs to be changed to return the correct info: the **Reports To Position Number**. The description returned in the query will be the description for the **Reports To Position Number.**
22. Click on the Edit button for the criteria, **A. POSITION_NBR – Position Number equal to E. POSITION_NBR –Position Number**.
23. Click on the look-up tool for **Expression 1**.
24. Click on the **Show Fields** button for record **A**.
25. Click on the link for **A.REPORTS_TO – Reports To Position Number**.
26. Click the **OK** button.
27. Add effective date criteria (see QY3 Guide, pg 49):



28. Click the **Run** tab.
29. Do you have the same number of rows? _______________
30. Save the query by clicking on any of the tabs (Example: **Fields**) then clicking **Save**.
31. Click **Return To Search** to go back to the Query Manager screen.

Activity 4B: Add a Record to an Existing Query

WHAT YOU SHOULD BE ABLE TO DO	
	▪ **RECORDS TAB:** Add a record ▪ **RECORDS TAB:** Use a Left Outer Join and observe difference from Standard Join ▪ **QUERY TAB:** Add fields from a record. ▪ **RUN TAB:** Execute a query

Scenario: You want to view the dependents for each employee and **include** those employees who do not have dependents.

Refer to p.34 in the QY3 Query Manager HCM v1.0 guide.

Directions:

1. Search for the QM_EE_DEPENDENTS query.
2. Click on the **Edit** link for the QM_EE_DEPENDENTS query.
3. Click the **Run** tab to view the results.
4. Click on the **Query** tab. Notice we only have one Record (**PERSONAL_DATA - PERSONAL_DATA for Rpting).**
5. Click on **Records** tab.
6. Search for Record Name containing the string '*DEPEN'*. Put the '%' wildcard character in front of the string to look for all records that contain it.
7. Click on the **Show Fields** link for the Record **DEPENDENT_BENEF - EE Dependents/Beneficiaries**.
8. Notice the record has the **DEPENDENT_BENEF - Dependent/Beneficiary ID** field. Close the Fields window or click on the **Return** button.
9. Click on the **Join Record** link for the **DEPENDENT_BENEF - EE Dependents/Beneficiaries** record.
10. For Join Type, select **Join to get additional fields only (Left outer join)**.
11. Click on **Record A = PERSONAL_DATA - PERSONAL_DATA for Rpting**.
12. An Auto Join Criteria message box will appear. Click the **Add Criteria** button.
13. You will be taken to the **Query** tab.
14. The **DEPENDENT_BENEF - EE Dependents/Beneficiaries** record will be expanded revealing the fields.
15. Select the **DEPENDENT_BENEF - Dependent/Beneficiary ID** field.
16. Select the **NAME - Name** field.
17. Click the **Run** tab.
18. How many rows were returned? ______________
19. Save the query as your own. Example: XX(initials)_ QM_EE_DEPENDENTS, then click **OK** to save.
20. Observe the difference in the results when removing the **DEPENDENT_BENEF – EE Dependents/Beneficiaries** record and re-adding with a **Standard Join**.

Activity 5: Add a Prompt

WHAT YOU SHOULD BE ABLE TO DO	▪ **FIELDS TAB:** Add a Prompt from a field. ▪ **FIELDS TAB:** Add a Date Range prompt.

Scenario 1: The *QM_POSITION_STATUS* query does not include a prompt for **Position Number** or **Date Range**. Add these prompts.

Refer to p.50 in the QY3 Query Manager HCM v1.0 guide.

Directions:

1. Navigate to **Query Manager**. Find the *QM_POSITION_STATUS* query and click the **Edit** link.
2. Click the **Run** tab. Note the number of rows returned. _________ The results set may be too large. Create prompts to narrow down the results.
3. Go to the **Fields** tab. Make sure the field(s) you want to prompt is there.
4. Click the **Add Criteria** icon for the field you want to add the prompt to.

   To add a prompt for **Position Number**:

   - Click the **Add Criteria** icon for the **POSITION_NBR** field.
   - **Condition Type** = **like**. By choosing “like” you can enter in the percent sign (%) to run the query for *all* types in the position field; if you select Equals, the user is forced to always run it by a *specific* type for that field.
   - **Expression 2 Type** = **Prompt**
   - Click the **New Prompt** link.
   - Type a percent sign (%) after “Position” in the **Heading Text** so you know to enter % for all positions or a specific position number.
   - **Edit Type = No Table Edit**. Doing this allows you to use the % sign.
   - Optional: Type % in the **Default Value** box to set the prompt’s default value to a percent sign meaning extract or select all positions.
   - Click **OK** to get back to the **Prompts** tab.
   - Notice a prompt for Position (*:2 = POSITION_NBR - Position*) has been created.
   - Click the **OK** button.
   - Click the **Run** tab to test the prompt.
   - Enter a % sign to return all Positions. Select and copy a Position number from the results.
   - Click the **Rerun Query** link and paste the Position Number you copied from the first run.
   - Do the results only return the Position entered in the prompt? ______________
   - Click on the **Prompts** and the **Criteria** tab to view the added prompt.
5. Save the query by clicking on any of the tabs (Example: **Fields**) then clicking **Save**.
6. Click **Return To Search** to go back to the Query Manager screen.

Scenario 2: You want to add a prompt to a query to return employees born between dates entered by the user.

Refer to p.50 in the QY3 Query Manager HCM v1.0 guide.

Directions:

1. Navigate to **Query Manager** and search for the *QM_BIRTHDATE_INFO* query.
2. Click the **Edit link**.
3. Run the query to test it works. You may want to download the results into Excel.
4. Return to the **Fields** tab and click on the **Add Criteria** icon for the **BIRTHDATE** field.
5. **Condition Type = equal to**.
6. **Expression 2 Type = Prompt**
7. Click on **New Prompt**.
8. Add "*From*" ahead of the **Heading Text**. It should read, "*From Birthdate*"
9. Click the **OK** button.
10. There should be a ":1" next to **Prompt**.
11. Click on the **New Prompt** link again.
12. Add "*To*" ahead of the Heading Text. It should read, "*To Birthdate*"
13. Click the **OK** button.
14. There should be a ":2" next to **Prompt**.
15. Change the **Condition Type** to "**between**"
16. The **Expression 2 Type** will provide different options. Select **Expr – Expr.**
17. Click on the **Add Prompt** link for the first (top) **Expression**.
18. Click the **:1 = BIRTHDATE – From Birthdate** prompt.
19. The prompt will appear in the box for the first Expression.
20. Click on the **Add prompt** link for **Expression 2**.
21. Click the **:2 = BIRTHDATE – To Birthdate** prompt.
22. The prompt will appear in the box for Expression 2.
23. Click the **OK** button.
24. Click on the **Run** tab to test the prompts.
25. Does it work? Now you know who to send birthday cards to each month!
26. Save the query by clicking on any of the tabs (Example: **Fields**) then clicking **Save**.
27. Click **Return To Search** to go back to the Query Manager screen.

Activity 6: Format a Query

WHAT YOU SHOULD BE ABLE TO DO	**FIELDS TAB:** Change how a field is displayed in the query. **PROMPTS TAB:** Add % to how a field is displayed to remind the user it is an option.

Scenario: The query created in Activity 5 needs to be formatted to aid the user. Change the label for the "Descr" field to Position Description. Format the Prompts Tab to remind the user the % sign can be entered to return all values for the field.

Refer to p.60 in the QY3 Query Manager HCM v1.0 guide.

Directions:

1. Search for your query from **Activity 5** (QM_POSITION_STATUS) and click the **Edit** link.

   To edit the **Descr field**:

2. Go to the **Fields** tab and click on the **Edit button** for the **DESCR – Description field**.
3. In the **Heading Area** select **Text**.
4. In the **Heading Text field** enter "*Position Description*".
5. Click **OK**.
6. Run the query to verify the column label has been changed.

   To edit the **Prompts**:

7. Click on the **Prompts** tab and click on the **Edit button** beside the prompt **:2 = POSITION_NBR – Position**.
8. Add a % sign to the end of the **Heading Text** for the **Position** prompt.
9. Optional: Type % in the **Default Value** box to set the prompt's default value to a percent sign meaning extract or select all positions.
10. Click **OK**.
11. Run the query to verify the Position prompt has been changed.
12. Save the query by clicking on any of the tabs (Example: **Fields**) then clicking **Save**.
13. Click **Return To Search** to go back to the Query Manager screen.

Activity 7: Actions

WHAT YOU SHOULD BE ABLE TO DO	
	▪ **ACTIONS MENU:** Do the following: Add a query to your favorites, copy a private query to another user, move a query to a folder, rename a query and delete a query. ▪ View and edit a query's properties.

Refer to pp.64-76 in the QY3 Query Manager HCM v1.0 guide.

Directions:

1. Navigate to **Query Manager**. Find any query and click the **Edit** link.
2. Click **Properties** to view/edit information about the query – last updated, public/private, folder name, etc.
3. Click **Return To Search** to go back to the Query Manager screen.
4. Click on the **Query Manager** breadcrumb in the Navigation and search for one of your queries.
5. Click the **Actions** dropdown menu.

Add to Favorites	Adds the query to your favorites, just like Query Viewer.
Copy to User	This is relevant to Private queries. When you create a Private query and want to share it with someone, use this option.
Move to Folder	To move a query to a folder (like HR, PAYROLL, etc.). For example, place the M_HR_ACT_ONLY in the HR folder. You can create your own folder as well.
Rename Selected	Can only rename your own private query
Delete Selected	Only your own Private Queries

Note: *You must share the new or modified private query with yourself, your regular id, so you can run the query from the Query Viewer screen.*

INDEPENDENT ACTIVITY (“TEST”)

Activity 8: Putting It All Together (Activities 2-7)

***Tip**: Read all the activity’s instructions to have a clear understanding of what needs to be done **before** starting to change the query.*

Search for the **QM_HR_EE_VALIDATION** query:

1. Add **Criteria** to only return **Active** HR Status.
2. Add **Prompts** for **Empl ID** and **date range** for **Effective Date**. Set character limits for the **Empl ID** and allow the use of the “%” for the **Empl ID** prompt.
3. Sort results by **Last Name**.
4. The query currently does not have a **description** for the **Reports To** field for the employee. Add this field and place it to the right of the **Reports To** field.
5. Rename and Save as XX(your Initials)_HR_EE_VALIDATION
6. Place in Personal Folder (create your own folder).

Activity 9: Query Manager Resources

The following Query Manager resources can be found on the CRC website (http://crc.sdcoe.net) *Guides & Job Aids* page in the *Query – QY3 Query Manager HCM* section.

- **QY3 Activity Sheet**: Activities used in the Query Manager training class.
- **QY3 Query Manager HCM Guide**: Guide describing how to use Query Manager for PeopleSoft HCM.
- **QY3 Query Manager HCM Presentation**: Presentation used in the Query Manager training class.
- **QY3 Records and Fields Master List**: Spreadsheet listing records (tables) and fields available to HCM “Q” users.
- **Third Thursday Demo Feb 2018 Query Manager HCM Things to Consider**: Presentation used for Feb. 2018 Third Thursday Demo.

Note: Once you have successfully completed Query Manager HCM training your regular PeopleSoft login id will have read-only access to the Query Manager screen. This will allow you to research queries that you will not be able to find with your "Q" user login id. You can customize or re-create those queries with your "Q" user login id on the Query Manager screen. You will only be able to modify queries that use records or tables from the *List of HCM Records for "Q" Users* found on page 3 of the Query Manager Guide.