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PeopleSoft Query Manager HCM (QY3-2)

Presented by SDCOE CRC | March 8, 2018



Agenda

Discussion
(30 min)
9:00-9:30

- What it means to be a “Q” user
- How Query Manager training is unique
- Authorization Form
- Query Manager Overview – screen and tabs
- Training Objectives

In Sandbox:
Guided instruction
with activities
(2 hr, 15 min)
9:30 - 11:45

- Create a new query
- Add a field
- Add criteria
- Add a record
- Add prompts
- Format a query
- Recommendations for managing queries

In Sandbox:
On your own
(45 min)
11:45 - 12:30

- ON YOUR OWN: Independent final activity (“test”). Have your work checked by an instructor.
- Course evaluation
- Self-dismissal upon completion of test and evaluation



86 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. See p.3 for the list of 86 records that you will have access to as a “Q” user.

Below is a list of commonly used records:

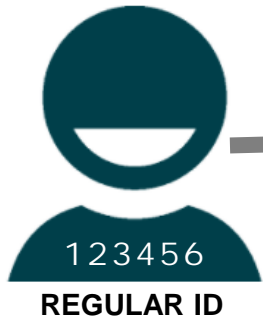
- JOB – EE Job History
- NAMES – Person Names
- POSITION_DATA – Position Data
- PAYROLL_DATA – EE Paycheck Delivery Data
- PERSONAL_DATA – PERSONAL_DATA for Rpting
- DEPENDENT_BENEF – EE Dependents/Beneficiaries

Any records that are available to “Q” users have been tested for security. Only secured records are available.



WHAT IT MEANS TO BE A “Q” USER IN HCM

Once you are trained in Query Manager HCM and authorized, you will be given the M_DISTRICT_QUERY_MANAGER role and you will have 2 logins: Your regular one (like 123456) and a “Q” one (like 123456Q).



You will see your usual screens and reports (no change)

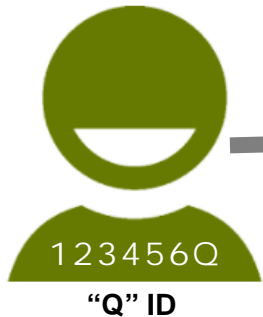
Continue to use this login to perform your tasks, as usual

You will see Query Viewer (no change)

You can find and run *all* queries for which you have access, as usual

NEW: Query Manager (READ ONLY) *All records*

You can now use Query Manager (read only) to research/investigate queries that you will not be able to find with your Q login



Your usual screens and reports will **not** be available

Your Main Menu will *not* include your usual screens

No Query Viewer

You will not see Query Viewer

NEW: Query Manager (WRITE) *Limited records*

You can now use Query Manager to create and edit private queries based on limited (secured) records. You will not be able to find all queries.

Only for the purpose of creating private queries!



Authorization Form



SAN DIEGO COUNTY OFFICE OF EDUCATION

6401 Linda Vista Road, San Diego, CA 92111 • 858-292-3500 • www.sdcoe.net
San Diego County Superintendent of Schools Dr. Paul Gothold

PeopleSoft Query Manager HCM Authorization Form

This form is used to request access to Query Manager for an employee at a district or charter school that uses PeopleSoft HCM. It lists Terms & Conditions (p.1) and a Confidentiality Agreement (p.2). This form must be signed by the Employee ("Signatory" or "User") and Superintendent before training and access to Query Manager will be provided.

Overview

PeopleSoft Query Manager is a tool in Human Capital Management (HCM) that allows users to create queries from a limited number of records (tables) that have been secured by SDCOE.

Terms and Conditions

1. In order to be a user of Query Manager the User must have experience with Excel and database structure (tables, fields, criteria, joins, etc.).
2. In order to be assigned the M_DISTRICT_QUERY_MANAGER role that grants access to Query Manager (also referred to as a "Q" user ID), the User must be trained in the use of Query Manager by the SDCOE Customer Resource Center.
3. The User must use a different "Q" user ID (123456Q, for example) to access Query Manager write functions. Read-only access to Query Manager will be granted to the user's regular ID (123456, for example).
4. The User will not have permissions to alter an existing public query (M_ or FAR_ for example).
5. The User may find an existing public query (M_ or FAR_ for example) and/or create a new query and save it as his or her own private query. The User may share a private query with other users (employees) within his or her organization.
6. Not all queries available under a regular ID are available under the "Q" user ID.
7. In order to not impact performance on the system, the User understands that they may schedule a private query to run daily/weekly but not hourly.
8. The user may not save queries for general public use; however may schedule a private query to distribute to other users or email addresses and takes responsibility that the receiver of the query has the correct permissions to receive the data extracted from the system.
9. **Use Query Manager at your own risk. It is recommended that the User incorporate a process to test and validate a query to confirm that the returned results are accurate.**
10. If the User creates and/or schedules a query that impacts PeopleSoft system performance, the SDCOE reserves the right to remove User's access to Query Manager.
11. The SDCOE will not support or troubleshoot a query that a User creates. Only M_ and FAR_ queries are supported and maintained.
12. There are two reasons to submit a HEAT ticket regarding Query Manager:
 - a. To submit a request for an additional record(s) to be added. Justification must be provided. The request will undergo a review process. The request may or may not be granted.
 - b. To request that the CRC uses the Query Administration tool to end a query that is not running to success.

Confidentiality Agreement

This Confidentiality Agreement (the "Agreement") is executed the date signed below and relates to the confidentiality of certain non-public proprietary or other confidential information that the Employee (the "Signatory" or "User") may have access to related to using PeopleSoft Human Capital Management (HCM) Query Manager.

By executing this Agreement, Signatory hereby expressly acknowledges and agrees to the following terms and conditions in consideration of Signatory's participation in the use of Query Manager HCM and potential access to confidential non-public and/or proprietary information:

1. All non-public information, documentation, and data produced by a query constitutes "Confidential Information" for purposes of this Agreement. The Signatory shall only use the Confidential Information if it is produced from their own Local Educational Agency as approved by their organization.
2. The Signatory's use of Query Manager HCM may result in access to other school districts' data which may be confidential non-public and/or proprietary. In the event that this should occur, the Signatory should notify Peyri Herrera, Director, Customer Resource Center so that further security can be put in place.
3. The Signatory shall not disclose any Confidential Information to any other person or organization.
4. Signatory shall implement appropriate measures designed to ensure the confidentiality and security of Confidential Information, protect against anticipated hazards or threats to the integrity or security of such information, protect against unauthorized access or disclosure of information, and prevent any other action that could result in substantial harm to the SDCSS or an individual identified with the data or information.
5. In consideration of authorization to participate in the use of Query Manager HCM, Signatory also agrees to indemnify, defend and hold harmless SDCSS from any and all liabilities or claims made by other individuals or entities as a result of any improper disclosure and/or use of Confidential Information, except for those claims arising from the sole negligence or sole willful conduct of SDCSS, its affiliated organizations, officers, employees, or other representatives.

Signatory Statement (Check the box below.)

I hereby certify that I have carefully read this document, and I fully understand its content. I am aware that this is a contract between myself and SDCSS and/or its affiliated organizations and sign it of my own free will.

Organization Name		
Employee's Name for Query Manager HCM Access (Print Signatory Name/ID/HEA)	Employee Signature	Date
Superintendent (Print Name)	Superintendent Signature	Date

For SDCOE use only:

Approved By	Date
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Form Version 1.0



5 Ways This Training Is Unique

- This class has pre-requisites
- A signed authorization form is required – signed by Superintendent
- There is an independent activity (“test”) at the end of the training session
- Query Manager is supported through workshops only (no help desk support)
- There are workshops 2x per year (Summer/Winter)



Query Manager Functions

The screenshot shows the Oracle Query Manager interface. The top navigation bar includes 'Favorites', 'Main Menu', 'Reporting Tools', 'Query', and 'Query Manager'. The main header features the Oracle logo, a search bar, and 'Advanced Search' and 'Last Search Results' links.

The 'Query Manager' section includes a search area with a 'Find an Existing Query | Create New Query' link (1), a search criteria dropdown set to 'Query Name' (3), and a search input field containing 'M_HR_P' (2). Below this are 'Search' and 'Advanced Search' buttons.

The 'Search Results' section shows a 'Folder View' dropdown (8) set to '-- All Folders --', and 'Check All' and 'Uncheck All' buttons. An '*Action' dropdown is set to 'Add to Favorites' with a 'Go' button.

There are two tables of query results:

- Query Table:** Lists various queries with columns for 'Query Name', 'Descr', 'Owner', 'Folder', 'Edit', 'Run to HTML', 'Run to Excel', 'Run to XML', 'Schedule', and 'Definitional References'. Numbered callouts 4, 5, and 6 point to the 'Edit', 'Run to Excel', and 'Schedule' buttons respectively for the 'M_HR_PERSON_DATA' query.
- My Favorite Queries Table:** Lists favorite queries with columns for 'Query Name', 'Descr' (7), 'Owner', 'Folder', 'Edit', 'Run to HTML', 'Run to Excel', 'Run to XML', 'Schedule', 'Definitional References', and 'Remove'. A 'Clear Favorites List' button is located below this table.

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**



Query Manager Tabs



- 1. Records** tab allows you to select the records to use in the query. At least one record must be selected before the query can be saved.
- 2. Query** tab allows you to select the fields you need for the query. At least one field must be selected before the query can be run and saved.
- 3. Expressions** tab will allow you to create expressions and use them as fields in your query (not covered in training).
- 4. Prompts** tab allows you to create runtime prompts (refer to [Add a Prompt](#) section).
- On the **5. Fields** tab you can view, edit, sort, reorder and remove fields that appear in the query (see [Format a Query](#) section).
- 6. Criteria** tab allows you to apply criteria to filter query results (see [Add Criteria](#) section).
- 7. Having** tab allows you to add criteria to fields that use aggregate functions - Max, Min, Sum, etc. (not covered in training).
- 8. Transformations** tab allows to add XSLT - Extensible Stylesheet Language Transformations (not covered in training).
- 9. View SQL** tab displays the SQL that is generated when the query is created.
- 10. Run** tab executes the query and displays results.



Objectives

BY THE END OF THE SESSION, YOU WILL BE ABLE TO:

- Create a new query
- Edit HCM queries by:
 - Adding a field from an existing record
 - Adding a field from a record that is not included in the query
 - Adding a prompt
 - Determining which type of join to use and knowing additional actions to take when using a left outer join
 - And formatting the query to return the data set how you please
- Rename and save queries as favorites
- Share a query
- Successfully complete the final independent activity



Let's log into the Sandbox.

User ID: XXXXXXQ (XXXXXX stands for your Employee ID)

SDCOE Customer Resource Center
http://crc.sdcoe.net

SDCOE **crc**

CUSTOMER RESOURCE CENTER

Home Our Services Announcements CRC Calendar Resources Links Contact Us

Our Services
Learn about the systems that we support and the services we provide.

Announcements
Check out the latest news from our department.

CRC Calendar
This calendar lists training sessions for Synergy and PeopleSoft, upgrades, and other CRC events.

Resources
Access guides, job aids, tutorials, and presentations.

Links
Navigate to frequently used sites related to student information, HR, and finance.

Contact
Call our Help Desk. We're here to assist you.

When you are logged in:

- Turn to p.10 in the guide
- Get ready for Activity 1

SANDBOX ENVIRONMENTS

Sandboxes are for use at your district to practice in a "play" environment. Available from work only. Not available via SecureAuth. Sandboxes were last refreshed from Production on Jan 29, 2018.

- **Finance Sandbox Database (SDFX)**
- **HCM Sandbox Database (SDHX)**



Recommendations for Managing Queries

1. **Development Process.** Identify a process for developing and managing queries.
2. **Validations.** Determine how you will test your query for accuracy before using it.
3. **Query Naming Conventions**
 - **XXX_**(where XXX is your district number) to identify queries created by your district
 - **XXX_REQS** = Queries created by your organization and are for Requisitions
 - **Version Control** – Use v1, v2, v3, and so on to track updates to queries you create and later revise.
4. **Folders.** Use folders to organize your district-created queries. Identify appropriate naming conventions for your folders.
5. **Sharing Queries.** Identify and communicate how queries will be shared. When a previously shared query is updated (to v2, for example), communicate which older version needs to be deleted (v1, for example)



On Your Own

Directions:

- 1. Complete the independent final activity.** This is your “test” to pass the class.
- 2. Get your work checked.** Ask an instructor to check your work.
- 3. Submit the course evaluation.** Please go to the CRC Links page. Scroll to the bottom and click the Muppet icon.
 - Course: QY3 Query Manager HCM
 - Section: 2
 - Instructor: HCM Team

Reminder:

- First workshop will be scheduled for the Summer (July/August timeframe)

