



Third Thursday Demo

PeopleSoft Query Manager HCM: Things to Consider

Presented by SDCOE CRC | February 15, 2018



SAN DIEGO COUNTY
OFFICE OF EDUCATION

CUSTOMER RESOURCE CENTER

Topics

- Explanation of what Query Manager is
- Explanation of what is covered in training, the training rollout plan, and summer/winter workshops
- Authorization Form
- How to request that you are registered for training (note there is no "self-registration" in GSMU for this course)
- Things your organization should consider:
 1. Who is the right person(s) to send to training and be given the M_DISTRICT_QUERY_MANAGER role?
 2. What will our validation process be?
 3. How will our organization implement queries?



What is Query Manager?



Query Manager Screen

Main Menu > Reporting Tools > Query > Query Manager

The screenshot shows the Oracle Query Manager interface. At the top, there is a navigation breadcrumb: Favorites > Main Menu > Reporting Tools > Query > Query Manager. Below this is the Oracle logo and a search bar with 'All' selected and a search button. To the right of the search bar are links for 'Advanced Search' and 'Last Search Results'.

The main section is titled 'Query Manager' and contains the text: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two links: 'Find an Existing Query' and 'Create New Query' (circled 1). A search form follows with '*Search By' set to 'Query Name' and a search button. The search criteria is 'begins with' and the value is 'M_HR_P' (circled 2). There are also 'Advanced Search' and 'Search' buttons.

Below the search form is the 'Search Results' section. It includes a '*Folder View' dropdown set to '-- All Folders --' (circled 8), 'Check All' and 'Uncheck All' buttons, and an '*Action' dropdown set to 'Add to Favorites' with a 'Go' button.

The main content area displays two tables of query results. The first table is titled 'Query' and has columns: Select, Query Name (circled 3), Descr, Owner, Folder, Edit, Run to HTML, Run to Excel, Run to XML, Schedule, and Definitional References. It lists several queries, including 'M_HR_PAY_SPG_AUDIT_099', 'M_HR_PERSON_DATA', 'M_HR_POSITIONS_DEPT', 'M_HR_POSITION_DATA', 'M_HR_POSIT_FTE_AUDIT', and 'M_HR_POSN_PYGRP'. The 'Edit' column for 'M_HR_PERSON_DATA' is circled 4, the 'Run to HTML' column is circled 5, and the 'Schedule' column is circled 6.

The second table is titled 'My Favorite Queries' and has columns: Query Name, Descr (circled 7), Owner, Folder, Edit, Run to HTML, Run to Excel, Run to XML, Schedule, Definitional References, and Remove. It lists three queries: 'M_HEALTH_DEN_BEN', 'M_HEALTH_MED_BEN', and 'M_HEALTH_VIS_BEN'. 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



- 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.
- 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.
- Expressions** tab will allow you to create expressions and use them as fields in your query (not covered in training).
- Prompts** tab allows you to create runtime prompts (refer to [Add a Prompt](#) section).
- On the **Fields** tab you can view, edit, sort, reorder and remove fields that appear in the query (see [Format a Query](#) section).
- Criteria** tab allows you to apply criteria to filter query results (see [Add Criteria](#) section).
- Having** tab allows you to add criteria to fields that use aggregate functions - Max, Min, Sum, etc. (not covered in training).
- Transformations** tab allows to add XSLT - Extensible Stylesheet Language Transformations (not covered in training).
- View SQL** tab displays the SQL that is generated when the query is created.
- Run** tab executes the query and displays results.



90 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 90 records that “Q” users have access to.
- 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



Only for the purpose of creating private queries!



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.



QY3 Query Manager HCM Training

Explanation of what is covered in training, the training rollout plan, and summer/winter workshops



5 Ways This Training Is Unique

- QY3 training has pre-requisites
 - Requires experience with database structure, including tables, fields, criteria, joins, and so on
- 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)

Also, we aim to have small class sizes for all QY3 sessions.



Training Objectives

BY THE END OF THE SESSION, LEARNERS 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



Guided instruction (activities)

PeopleSoft Training Activity Sheet

QY3 QUERY MANAGER HCM

For use in training. Last updated February 8, 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.....	2
Activity 2: Add a Field (Existing Record).....	3
Activity 3: Add Criteria	4
Activity 4A: Add a Record to an Existing Query.....	5
Activity 4B: Add a Record to an Existing Query.....	7
Activity 5: Add a Prompt	8
Activity 6: Format a Query	10
Activity 7: Actions.....	11
Activity 8: Putting It All Together (Activities 2-7).....	12



Training Rollout

Training

- **March 2018**
 - 4 training dates
 - March 2, 8, 20, 28
- **April 2018**
 - Tentatively 2 training dates scheduled at the end of April (dates TBA); # of sessions will be adjusted as needed
- **May 2018**
 - TBD based on need
- **Moving forward:**
 - QY3 Training will be offered 4x per year (Summer, Fall, Winter, Spring)

Workshops

- QY3 Workshops will be offered 2x per year (Summer, Winter)
- July/August 2018 will be the first QY3 Workshop offering (date TBD)



Authorization Form



Authorization Form

This form is available at <http://crc.sdcoe.net/requests/querymanagerhcm>
Or search "authorization form" on the CRC website.



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San Diego County Superintendent of Schools Dr. Paul Gotthold

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

- In order to be a user of Query Manager the User must have experience with Excel and database structure (tables, fields, criteria, joins, etc.).
- 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.
- The User must use a different "Q" user ID (123456Q, for example) to access Query Manager write functions. Only access to Query Manager will be granted to the user's regular ID (123456, for example).
- The User will not have permissions to alter an existing public query (M_ or FAR_ for example).
- The User may find an existing public query (M_ or FAR_ for example) and/or create a new query and save it as their own private query. The User may share a private query with other users (employees) within his or her organization.
- Queries available under a regular ID are available under the "Q" user ID.
- The User understands that they may schedule a private query to run daily/weekly but not hourly.
- 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.
- Use Query Manager at your own risk. It is recommended that the User incorporates a process to test and validate a query to confirm that the returned results are accurate.**
- 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.
- The SDCOE will not support or troubleshoot a query that a User creates. Only M_ and FAR_ queries are supported and maintained.
- There are two reasons to submit a HEAT ticket regarding Query Manager:
 - 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.
 - To request that the CRC uses the Query Administration tool to end a query that is not running to

p.1
Terms &
Conditions

PeopleSoft Query Manager HCM Authorization Form v1.0.pdf

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 or "User" may have access to related to using PeopleSoft Human Capital Management (HCM).

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

- 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.
- 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.
- The Signatory shall not disclose any Confidential Information to any other person or organization.
- 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.
- 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 (First Signatory Name/ID/Title)	Employee (Signature)	Date
Superintendent (First Name)	Superintendent (Signature)	Date

For SDCOE use only:

Approved By	Date
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Form Version 1.0

2 signatures:
Employee (User)
& Superintendent

p.2
Confidentiality
Agreement



How to Request Training

Directions: Follow this process to obtain access to Query Manager HCM.

1. Identify the next QY3 Query Manager HCM training date. NOTE: This course is not available for self-registration. Training dates will be March 2, 8, 20, and 28. All training will be from 9:00 am - 12:30 pm at SDCOE.
2. Download and complete the Authorization Form. This form must be signed by the Employee and Superintendent before training and access to Query Manager will be provided.

Authorization Form: [PeopleSoft Query Manager HCM Authorization Form v1.0 pdf](#)

3. Send an email to Lori Free-Trout (lfreetrout@sdcoe.net) with the following:
 - A. Attach a scanned copy of the signed Authorization Form (both pages, front and back), AND
 - B. Specify your preferred date of QY3 training. If there is space available, you will be registered for training and receive a confirmation email from Go Sign Me Up (GSMU).
4. Two days prior to training you will receive an automated reminder email from GSMU.
5. Attend QY3 training. You must successfully complete the final independent activity (“test”) in order to be granted access to Query Manager HCM.
6. The day after training you will be assigned the M_DISTRICT_QUERY_MANAGER role.



Considerations



Things to Consider

These recommendations are based on feedback and lessons learned from the pilot. Many of these items are great topics for the Query Manager Workshops and user group sessions.

Who is the right person(s) to send to training and be given the M_DISTRICT_QUERY_MANAGER role?

- **Consider skills/ability:** Creating queries requires experience with database structure, including tables, fields, criteria, joins, and so on.
- **Consider knowledge:** Creating queries requires an understanding of the data.
- **Consider sensitive data:** Remember that sensitive data can be included in queries.
- **Consider time required**

What will our validation process be?

- **Consider who will validate query results**
- **Consider how you will validate and “sign off” on queries**

How will our organization implement queries?

- **Consider how to manage query requests**
- **Consider naming conventions of queries**
- **Consider how you will communicate new and updated queries**







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)



Recommended Next Steps

- Discuss considerations as a team
- Review guide, activity sheet, and records/fields list on CRC Guides & Job Aids page

 Query - QY3 Query Manager HCM		
 PeopleSoft QY3 Query Manager HCM Guide v1.0.pdf View Download	The QY3 guide covers how to use PeopleSoft Query Manager HCM to create and edit private queries. NOTE: You must receive training in order to perform the functions in this guide. Version 1.0, updated 02/07/18 (80 pp.)	3022k
 QY3 Activity Sheet v1.0.pdf View Download	Activities used in QY3 training. Updated 2/8/18. (12 pp.)	132k
 QY3 Records and Fields Master List 02-15-18.xlsx View Download	Lists the records and fields available to HCM "Q" users. Updated 02/15/18.	53k

