

## **PS Query: Creating a Query**

**Purpose:** The instructions below describe how to select records (tables) and fields to create a new query using Query Manager.

Step	Action
1.	Navigate to the <b>Query Manager</b> page. Select <b>Main Menu &gt; Reporting Tools &gt; Query &gt;</b> <b>Query Manager</b>
	Favorites Main Menu > Reporting Tools > Query > Query Manager
	Query Manager
	Enter any information you have and click Search. Leave fields blank for a list of all values.
	*Search By: Query Name    begins with
	Find an Existing Query   Create New Query
2.	Click the <b>Create New Query</b> link at the top or bottom.
	Query Manager
	Enter any information you have and click Search. Leave fields blank for a list of all values.
	Find an Existing Query   Create New Query
	*Search By: Query Name - begins with Search Advanced Search
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	Find an Existing duery   Create New Query



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Step	Action
4.	Select the <b>Add Record</b> link for the appropriate record (in this example use the following records: STDNT_AWARDS, ITEM_TYPE_TBL, SRVC_IND_DATA, SCC_NAMES_QVW)
	<b>Result:</b> The <b>Ouerv</b> tab displays with available fields for the selected Record.
	Records Query Expressions Prompts Fields Criteria Having View SQL Run
	Query Name: New Lessued Query Description:
	Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add
	additional records by clicking the records tab. When finished click the fields tab.
	Alias Record
	A STDNT_AWARDS - Student Awards Hierarchy Join
	Check All Uncheck All
	Fields Find   View All First 1-50 of 52 Last
	EMPLID - EmpliD     Search View     People Search View     Init INSTITUTION Academic Institution
	AID YEAR - Aid Year      AID YEAR - Aid Year      Join STUDENT_AID - Student %
	Aid Table
	ACAD_CAREER - Academic Career
	DISBURSEMENT_PLAN - Disbursement Plan     SPLIT_CODE - Split Code
	SETID - SetID
	AWARD_STATUS - Award Status
	OFFER_AMOUNT - Offer Amount
	ACCEPT_AMOUNT - Accept Amount
	DISBURSED_AMOUNT - Disbursed Amount
	<i>Note:</i> If fields from multiple Records are needed for one report a join must occur
	Records are joined by common key fields. To join a Record, add the first Record
	and select the desired fields. When the <i>Records</i> tab is selected again, the Join
	<b>Record</b> link displays. Select the <b>Join Record</b> link for the Record you wish to add.
5.	Use the Query tab to add the desired fields to a query. Select the checkbox for
	each field you wish to add to the query. Note: You may have to scroll down to
	select multiple records to find the fields you wish to add.
	For this example select:
	• EMPLID
	• NAME
	• ITEM TYPE
	• DESCR
	OFFER_AMOUNT
	ACCEPT_AMOUNT
	DISBURSED_AMOUNT



Step	Action						
6.	Click the <i>Fields</i> tab.						
	<b>Result:</b> The selected fields disp Records Query Expressions Prompts	lay on the Fields Criter	<i>Fields</i> ta	ab. View SQL	Run		
		Descripti				6	Feed -
	Query Name: RACHEL_ATHLETES_PA_EX1	Description	on:				J Feed +
	View field properties, or use field as criteria in query s	statement.	Guatan	ning   Find   \//	∧	Reorder	/ Sort
	Col Record.Fieldname	Format Ord	XLAT Agg	Heading Text	Add Criteria	Edit	Delete
	1 A.EMPLID - EmpliD	Char11		ID	9	Edit	
	2 A.ITEM TYPE - Item Type	Char12		Item Type	9	Edit	
	3 A.OFFER AMOUNT - Offer Amount	Num10.2		Offered	9	Edit	-
	4 A ACCEPT AMOUNT - Accept Amount	Num10.2		Accepted		Edit	
	5 B DESCR - Description	Char30		Descr	2	Edit	
	6 A DISBURSED AMOUNT - Disbursed Amount	Num10.2		Disbursed	9	Edit	
		110110.2		Diobaloca	**	Luit	
7.	To change the order of the colum <b>Reorder / Sort</b> button. <b>Reorder / Sort</b> <b>Reorder / Sort</b> <b>Result:</b> The Edit Field Ordering Edit Field Ordering Reorder columns by entering column number assigned a number. Change the order by number the field blank or enter a 0.	nns that the g page disp rs on the left. Co nber by entering	e fields lays. plumns left l numbers c	are display blank or assign on the right. To r	ed a 0 will be a emove an orde	ek the	ally ber, leave
	Edit Field Ordering Customize   Find   View All   🖉   🏥 First 🕚 1-6 of 6 🕑 Last						
	New Column Column Record.Fieldname			Order E	by Descending	New O	rder By
	A.EMPLID - EmpliD						
	2 A.ITEM_TYPE - Item	ype					
	3 A.OFFER_AMOUNT -	Offer Amount					
	4 A.ACCEPT_AMOUNT	- Accept Amoun	t				
	5 B.DESCR - Descripti	on					
	6 A.DISBURSED_AMO						
	OK Cancel						
8.	Enter the desired order informate button. <i>Tip:</i> Use the <b>Edit</b> button to char	ion into the	e <b>New C</b>	C <b>olumn</b> fie column he	eld. Click ader (Hea	the <b>O</b> l ding T	K Text).



Step	Action
9.	Click the Save button. Save NOTE: If using an existing query, always Save As, do NOT overwrite. <b>Result:</b> The Save properties page display.  Enter a name to save this query: <sup>*Query:</sup> Description: Folder: *Query Type: User  Private Query Definition: OK Cancel
10.	<ul> <li>Complete the following:</li> <li>Query – Enter a name for the query. <i>Note:</i> The query name may only contain letters, numbers or underscores (NO SPACES), follow naming convention</li> <li>Description – Enter a brief description (optional). Entering a description here allows you to search by keywords when trying to find a query.</li> <li>Folder – Enter a folder name (you create it by entering it here), if you wish to store this query in a folder.</li> <li>Query Type – Select <i>User, Archive, Process,</i> or <i>Role.</i> Standard queries are defined as <i>User</i>, and queries that use workflow are defined as <i>Process</i> or <i>Role. Archive</i> is used to identify queries that may be stored for now and used later.</li> <li>Owner – Select <i>Private</i> or <i>Public.</i> A <i>Private</i> query can be accessed and modified by only the user who created the query. However, any user who has access to the query records can run, modify, or delete a <i>Public</i> query.</li> <li>Query Definition – Enter a more complete description of what the query entails (optional).</li> </ul>
	<i>Note:</i> The query name may only contain letters, numbers or underscores. The <b>Query</b> , <b>Description</b> , <b>Folder</b> , <b>Query Type</b> , and <b>Owners</b> fields may be used to search for a query.
11	Check the <b>Ori</b> toria tale to a defense if the tand
11.	Select the Criteria tab to add specifications to the query.         Records       Query       Expressions       Prompts       Fields       Criteria       Having       View SQL       Run         Query       TEST_QUERY_11152010       Description:       Image: Criteria       No criteria have been added yet.         Add Criteria       No criteria have been added yet.       Description:       Image: Criteria       No criteria have been added yet.
	Save Save As New Query Preterences Properties Publish as New Union Return To Sear Feed



Step	Action
12.	Click the Add Criteria button. Select the appropriate <i>field</i> , <i>condition</i> , <i>and constant</i> .
	<i>Tup</i> . See Appendix B for <i>Condition Type</i> definitions and examples.
	Edit Criteria Properties
	Choose Expression 1 1 Type Choose Record and Field
	Field     Record Alias.Fieldname:     Q
	*Condition equal to  Type:
	Choose Expression 2
	Define Constant
	Constant:
	© Constant
	© Prompt
	Subquery
	OK Cancel
	In this example, select <b>A.OFFER_AMOUNT</b> for the <i>field (Expression 1)</i> . In the <i>Condition Type</i> field, select the <b>greater than</b> operator. Type a zero in the <b>Constant</b> field (Expression 2). Click the <b>OK</b> button to add the criteria
	Criteria
	Logical Expression1 Condition Type Expression 2 Edit Delete
	AND  AOFFER_AMOUNT - Offer Amount greater than 0 Edit
	<i>Note:</i> You may select <b>Prompt</b> in the <i>Expression 2</i> field to create a prompt. When the user runs the report, they will be prompted to input the value for this field.
13.	Use the Expression, Prompts, and Having tabs, as appropriate. See Appendix for additional details.
14.	Click the <b>Run</b> tab to view query results.
	Records Query Expressions Prompts Fields Criteria Hawing View SQL Run
	View All   Rerun Query Download to Excel Download to XML First 🔳 1-100 of 26948 🕑 Last
	ID Item Type Offered Accepted Descr Disbursed
	1 ####### 920100000020 3278.00 Direct Unsubsidized Loan 1631.00
	2 778.00 3278.00 3278.00 3278.00 Direct Unsubsidized Loan 1631.00
	3 THEFT SECTION OF A STATE STA
	5 ######## 920100000020 3278.00 3278.00 Direct Unsubsidized Loan 1631.00
	6
	Note: Results may be downloaded to Excel or XML.



Step	Action					
15.	Once the report has run, additional query features are available on the Query tab.					
	Save As New QueryPreferencesProperties Publish as New Union Feed					
	Feature	Description				
	Save As	Allows the current query to be saved with a new name.				
	New Query	Gives the user the option to discard the current query and				
		start a new one.				
	Preferences	Allows the user to enable <i>Auto Join</i> and <i>Auto Preview</i> .				
		Query Preferences				
		*Name Style: Name and Description				
		C Enable Auto Join				
		(Query will automatically determine the join conditions				
		for you when a new record component is added)				
		Enable Auto Proview				
	Duanautias	Allows the year to adit gyary monarties				
	Properties	Query Properties				
		*Query: RACHEL_TEST				
		Description: Test Admissions Query				
		Folder:				
		*Query Type: User				
		*Owner:  Private				
		Distinct     Security Join Optimizer				
		Query Definition:				
		Last Undated Date/Time: 00/00/2010 1:48:53PM				
		Last Update User ID: rajones				
		OK Cancel				
Note: The <b>Distinct</b> box can be select to avoid du						
		when applicable.				
	<b>Publish as Feed</b>	Allows the user to publish the results into a file that can be				
		imported into another system.				
	New Union	Allows the user to combine 2 or more queries. The results of				
		each one are combined with the others and then any duplicate				
		rows (exactly the same data in more than one row) are				
		thrown out so each row is unique in the results.				



## Appendix A – Advanced Features

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

Tab/ Advanced	Description
Feature	
Expressions	<b>Expressions -</b> This is where you define Expressions. An expression can be either a built in function native to your database like a CASE statement, or it can be a "calculated" expression that uses existing fields and does math with them, like adding 2 numeric fields together, or string operations like combining two or more fields together to make a longer string.
	*Expression Type: Character
	Aggregate Function Decimals:
	Expression Text:
	Add Prompt Add Field
	OK Cancel
	<ul> <li>An example would be to make a "complete" name from a first name and a last name field.</li> <li>Enter the two fields (by using the Add Field link), put the + sign in between the fields</li> <li>Set the length of the max output size</li> <li>Click the OK button to see the completed expression.</li> <li>If you select the Use as Field link, the expression will be added to the fields in the results.</li> </ul>
	Expression Types: • Character • Date • Datetime • Long Character • Number • Signed Number



Prompts	<b>Note:</b> Add a prompt by using the <b>funnel icon %</b> (create a criteria based on this field) on the <i>Fields</i> , <i>Query</i> , or <i>Expressions</i> tab.
	<b>Prompts</b> - This is where the Prompts used for user input into the query are stored and built. Edit Prompt Properties
	Field Name: *Heading Type:   Q Text   Type: Heading Text:   Character •   *Format: *Unique Prompt Name:   Upper BIND1   Length: 11
	Decimals:     Prompt Table:       *Edit Type:     Prompt Table:       No Table Edit     ▼       OK     Cancel
Having	Having - This is a special tab that is only used if you "Grouping" data together. Grouping is where you do things like add all the rows together to get the total number of credits a student may have taken in a term. In the same way a <i>Row Limiting Criteria</i> might restrict the result (WHERE Aid_Year = '2010') a <i>Having</i> is used to restrict which rolled up data is shown (HAVING SUM(Credits) > 6). Edit Having Criteria Properties Expression Expression Expression equal to requal to rype: Field Field Field Field Field Constant Prompt Subquery Choose Expression Cancel
View SQL	<b>View SQL -</b> This is where you can see the actual SQL (Structured Query Language) code the tool is creating. You cannot make any changes here however; you can sometimes diagnose issues here.
	Query       TEST_QUERY_11152010       Description:       Select         Name:       Ouery SQL:       SELECT A ACAD_CAREER, A ADM APPL_NBR, A ADMIT_TYPE, TO_CHAR(A ADM_APPL_DT, 'YYYY-MM-DD')         FROM PS_ADM_APPL_DATA A, PS_ADM_APPL_SCTY A1       WHERE A EMPLID       A1 EMPLID         WHERE A EMPLID       A1.ACAD_CAREER       A1 ACAD_CAREER         AND A ACAD_CAREER = A1.ACAD_CAREER       AND A.ACMA_APPL_NBR = A1.ADM_APPL_NBR         AND A1.OPRCILASS = 'HCPPALL'       AND A1.OPRID = 'rajones'



## Appendix B – Condition Types

Condition	Definition
Туре	
between / not	Between - The value in the selected record field falls between two
between	comparison values. The range is inclusive.
	Not Between - The value in the selected record field falls outside two
	comparison values.
does not exist /	This operator is different from the others, in that it compares a record field
exists	to a subquery. If the subquery returns any data, PeopleSoft Query returns
	the corresponding row.
equal to / not	<b>Equal to</b> - The value in the selected record field exactly matches the
equal to	comparison value.
1	<b>Not equal to</b> - The value in the selected record field does not exactly match
	the comparison value.
greater than /	<b>Greater than</b> - The value in the record field is greater than the comparison
not greater	value.
than	Not greater than - The value in the record field is not greater than the
	comparison value.
in list / not in	<b>In list</b> - The value in the selected record field matches one of the
list	comparison values in a list.
	Not in list - The value in the selected record field does not match one of the
	comparison values in a list.
in tree / not in	The value in the selected record field appears (or doesn't appear) as a node
tree	in a tree created with PeopleSoft Tree Manager. The comparison value for
	this operator is a tree or branch of a tree that you want PeopleSoft Query to
	search.
is null / is not	<b>Is null</b> - The selected record field is blank or "empty". You do not specify
null	a comparison value for this operator.
	<b>Is not null</b> - The selected record field is not blank or "empty". You do not
	specify a comparison value for this operator.
	Key fields, required fields, character fields, and numeric fields do not allow
	null values.
less than / not	<b>Less than</b> - The value in the record field is less than the comparison value.
less than	Not less than - The value in the record field is not less than the comparison
	value.
Like / not like	Like - The value in the selected field matches a specified string pattern. The
	comparison value may be a string that contains wildcard characters. The
	wildcard characters that PeopleSoft Query recognizes are % and %
	matches any string of zero or more characters.
	Not like - The value in the selected field does not match a specified string
	pattern.