PeopleSoft Training

Human Resources Query Basics 9.1

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Table of Contents

Human Resources Query Basics 9.1

Welcome to **PeopleSoft Query Basics for Human Resources**. This module contains information and tools needed to perform basic query functions in PeopleSoft 9.1.

At the end of this module you will be able to…

1. Search for existing queries.
2. Run existing queries
3. Run existing queries to HTML and Excel
4. Export existing queries to Excel
5. Understand the options available in Excel to format existing queries.

NOTE: This guide serves as a introduction to the Query Module of PeopleSoft 9.1. This module will not cover topics associated with creating or modifying queries.

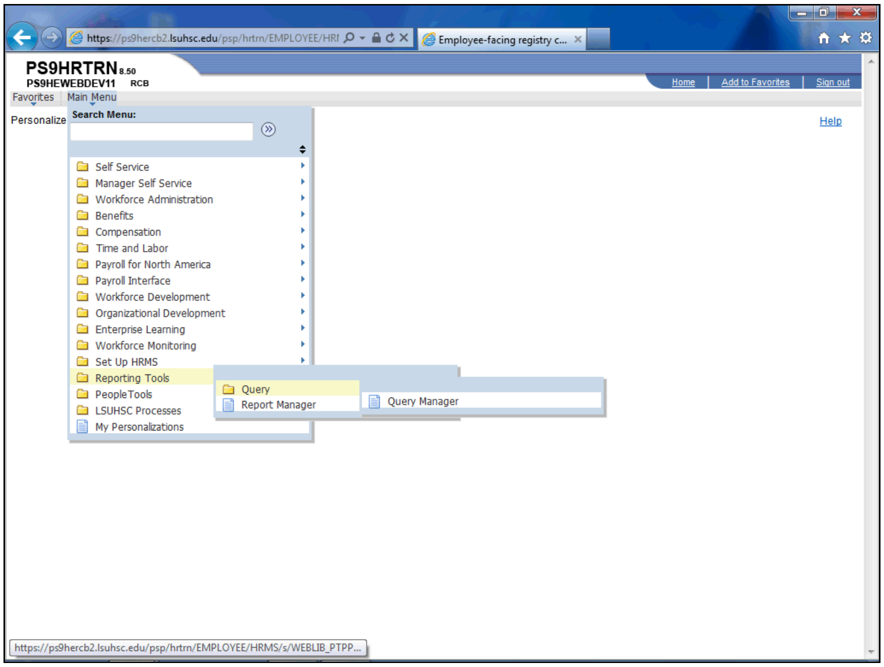
Existing Queries

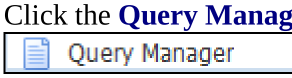
Run an Existing Query

Procedure

In this topic you will learn how to **Run an Existing Query**.

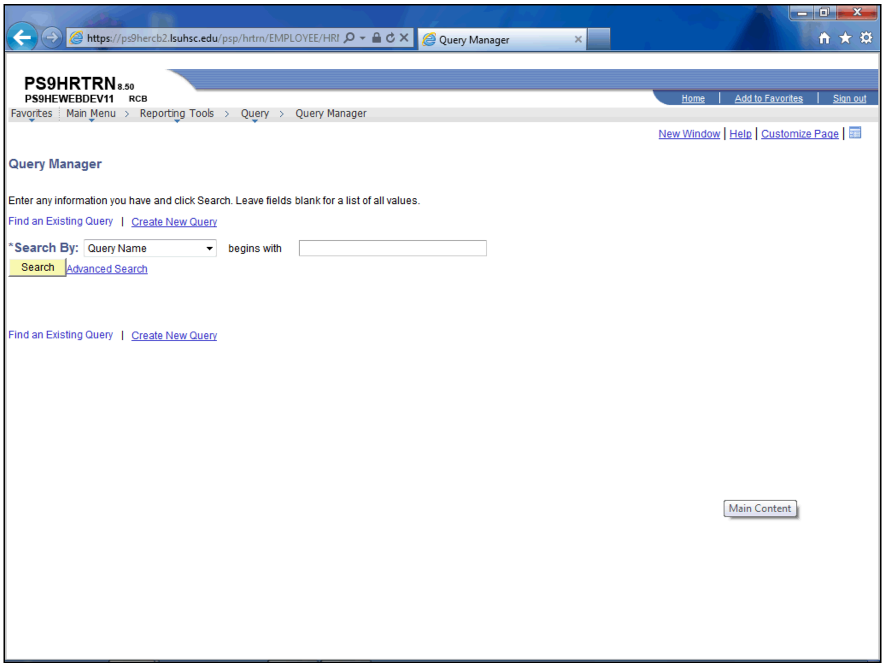
Step	Action
1.	Predefined queries are called Public queries in PeopleSoft. In this example you will search and run a public query.
2.	Click the **Main Menu** button. 
3.	Point to the **Reporting Tools** menu.
4.	Point to the **Query** menu.



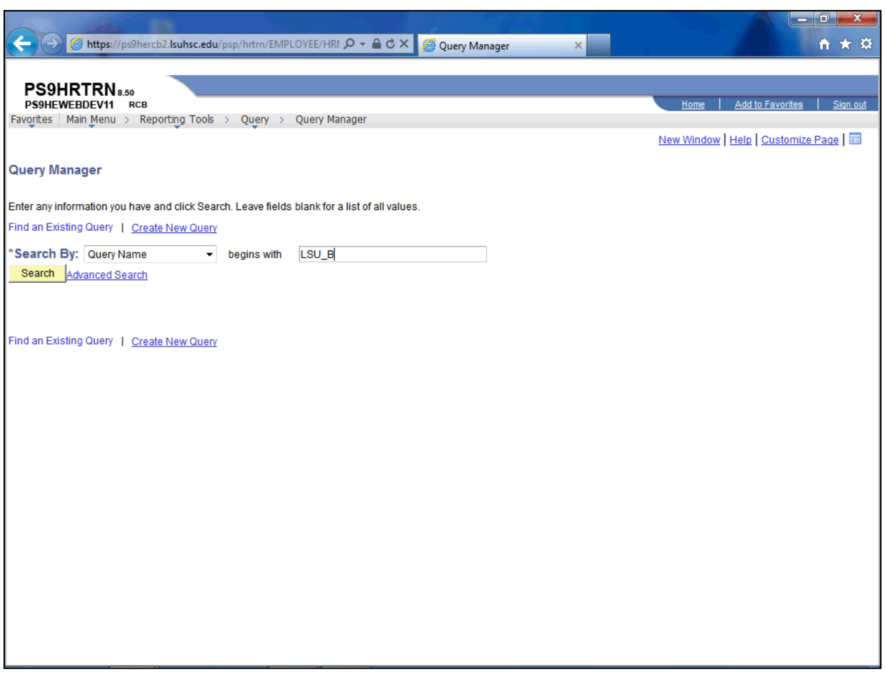
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5.</td><td>Click the Query Manager menu.

</td></tr>
<tr><td>6.</td><td>When the Query Manager is opened, it defaults to the Find an Existing Query page. The end-user may view existing queries utilizing one of the following methods:

1. Click the Search button to view a list of all existing queries. The end-user's private queries will display at the top of the list. Private queries will be covered in the Create a New Query section; or

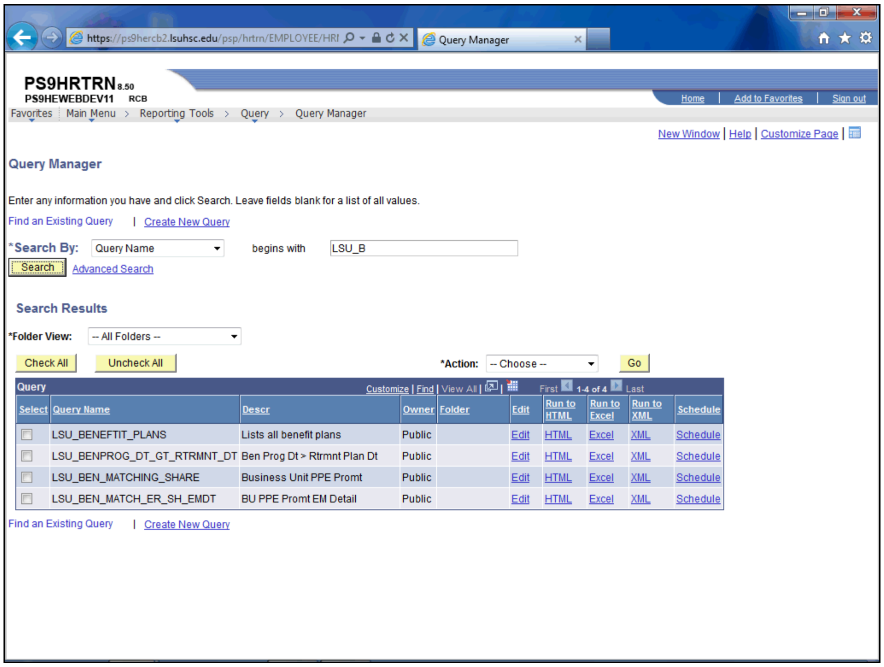
2. Enter the appropriate search criteria (query name) into the Search By field. The end-user <u>must</u> enter all or part of the query name. Use the % (percent sign) to act as a wildcard when searching.</td></tr>
</table>



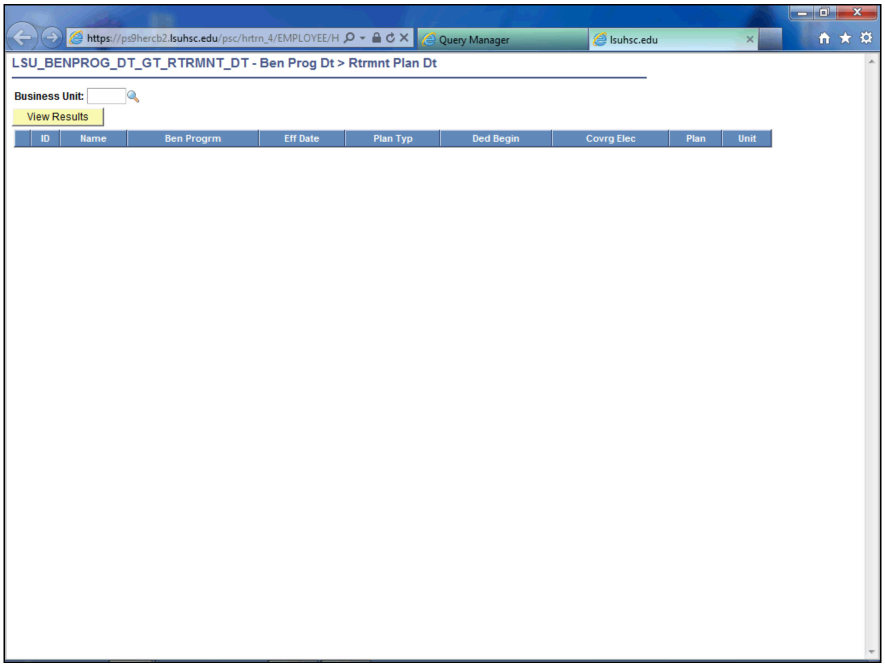
Step	Action
7.	In this example you will search for a query by entering part of the query name into the search field. Enter the desired information into the **Search By** field. Enter "**LSU_B**".



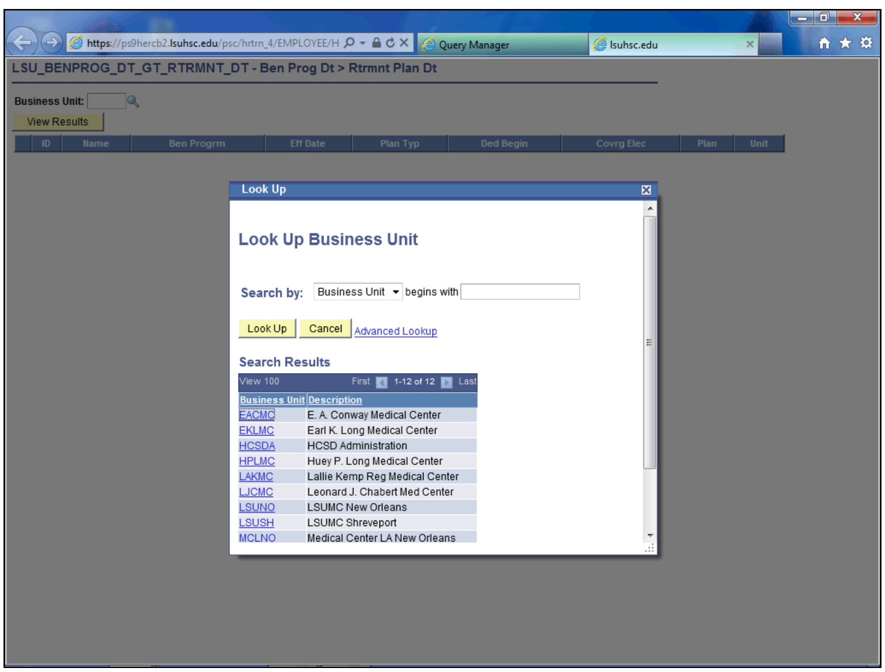
Step	Action
8.	Click the **Search** button. Search



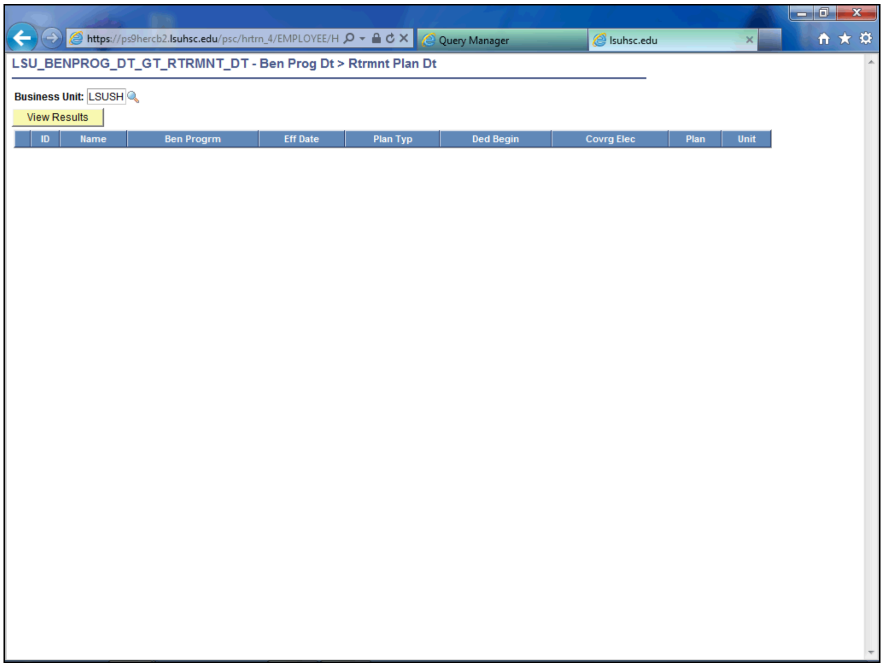
Step	Action
9.	In PeopleSoft 9.1 there are two ways to view query results: **HTML** - will open a separate window within the PeopleSoft application to display query results. The HTML method does not allows the user to edit the results, however, queries should be run to HTML first and then downloaded to Excel. All retrieved results may be viewed in HTML. Excel does have a limit on the number of rows retrieved, so a large number of results may not all display in Excel. **Excel** - the query results will display as a web page in Excel within the PeopleSoft application. The data may be sorted, filtered etc. in this format, and you may save the data as an Excel file.
10.	Run the query to HTML. Click the **HTML** link. HTML



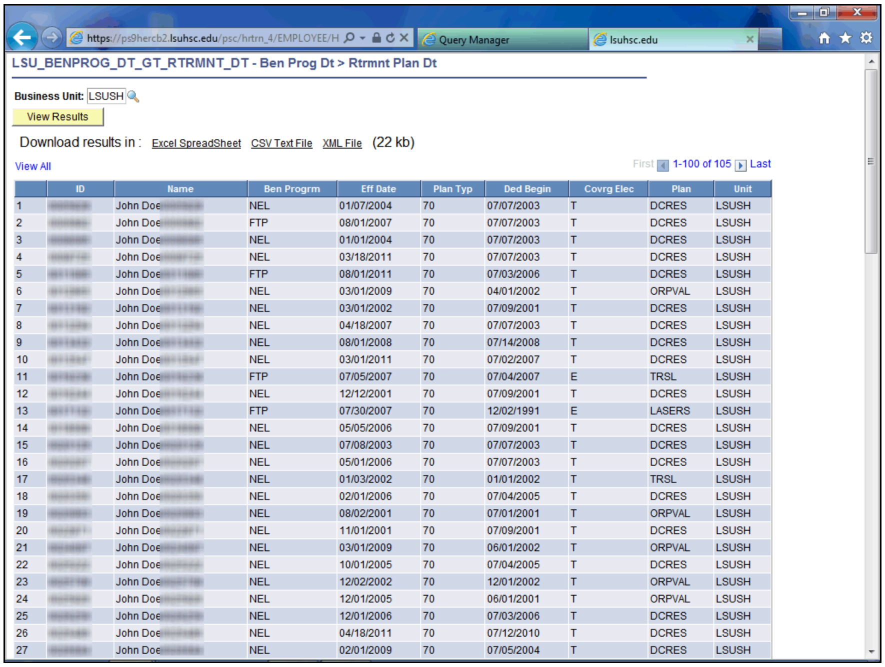
Step	Action
11.	Click the **Look up Business Unit (Alt+5)** button. 



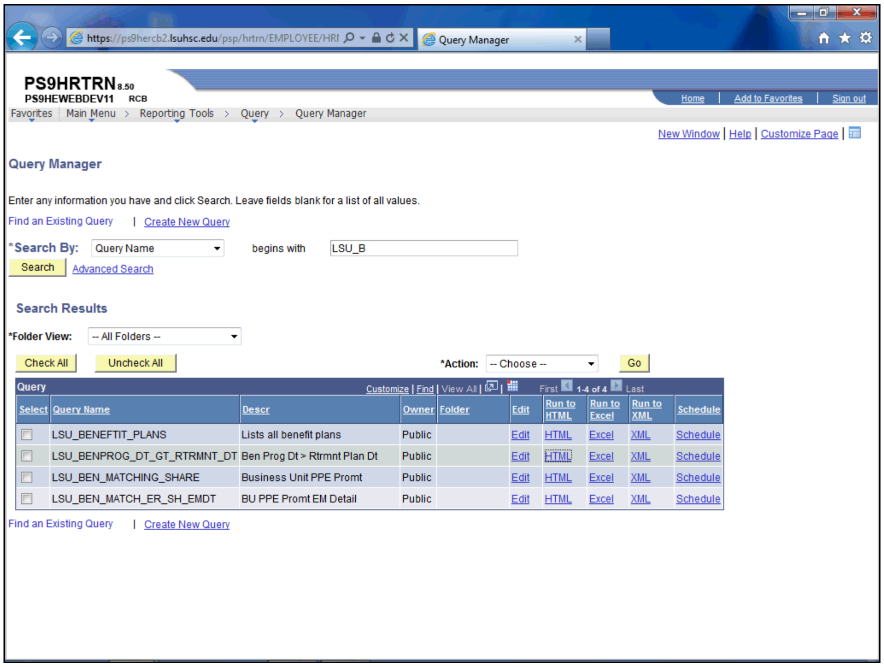
Step	Action
12.	Click the **LSUSH** link. LSUSH



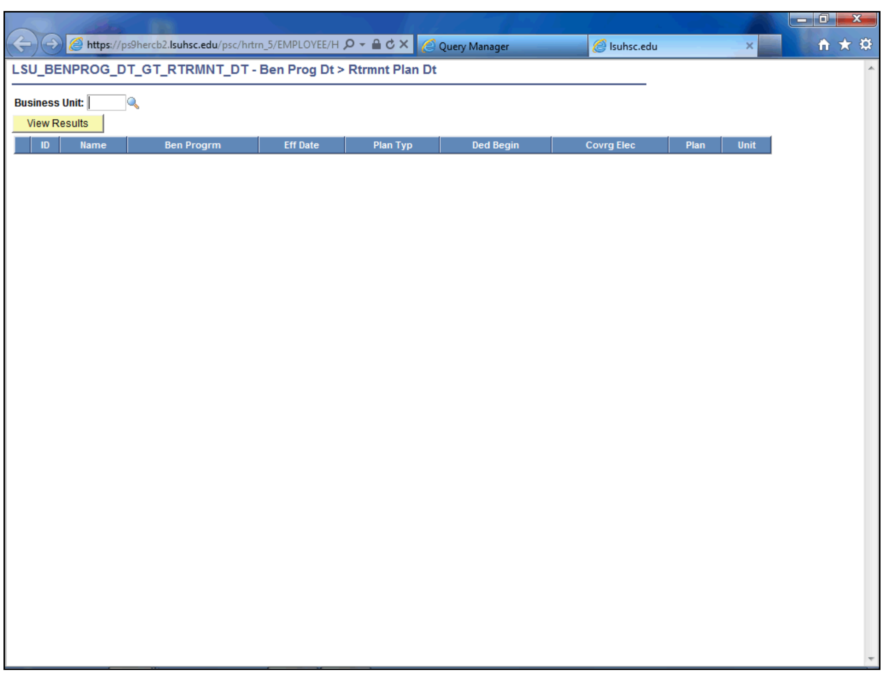
Step	Action
13.	Click the **View Results** button. View Results



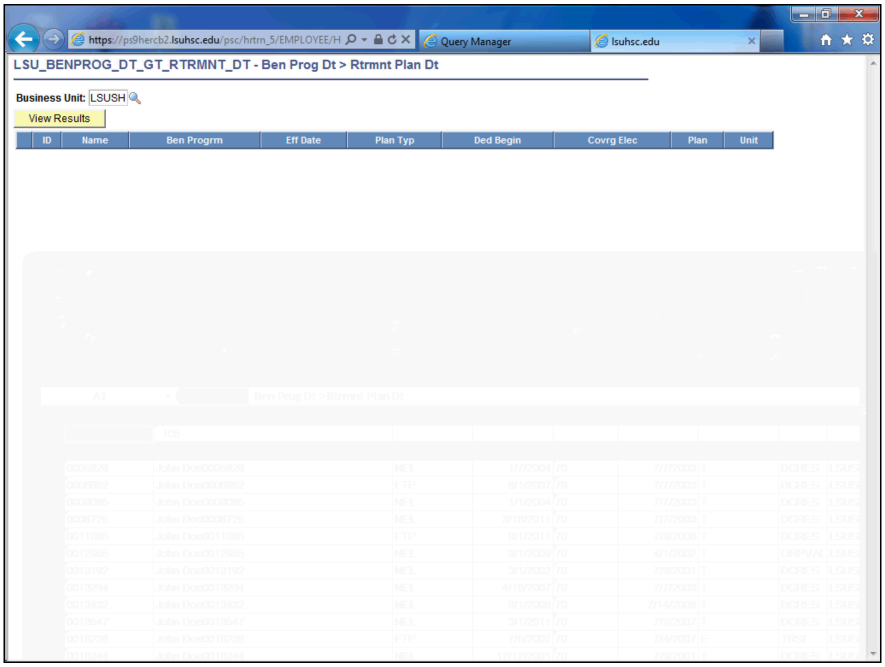
Step	Action
14.	A new window displays the query results. Running to HTML gives users the opportunity to verify accuracy of the results before continuing. You may download your results to Excel from the HTML spreadsheet by clicking on the Excel Spreadsheet link.
15.	Click the **Close Tab (Ctrl+W)** button. 



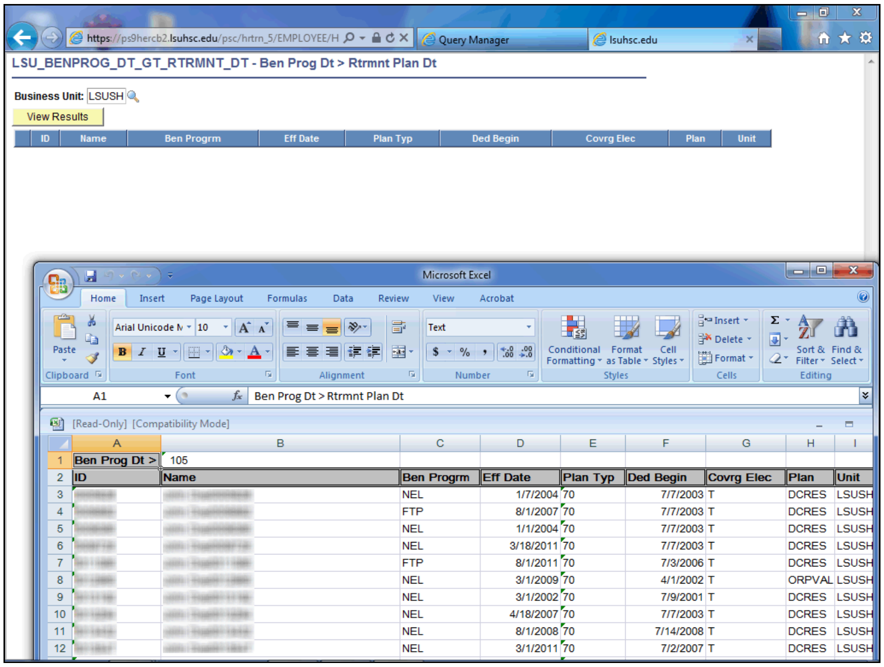
Step	Action
16.	Run the query directly to Excel. Click the **Excel** link. Excel



Step	Action
17.	Enter the desired information into the **Business Unit** field. Enter "**LSUSH**".



Step	Action
18.	Click the **View Results** button. View Results



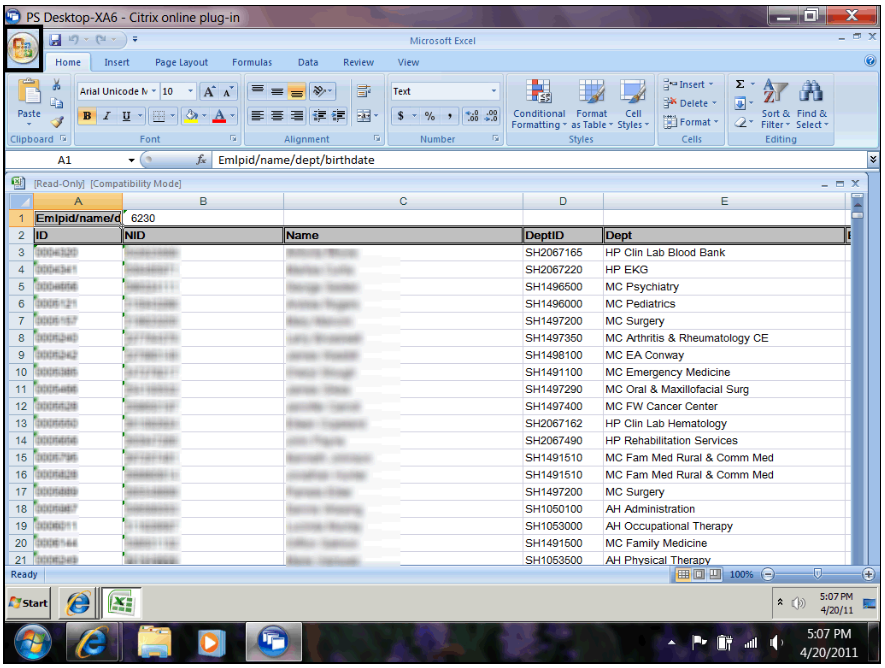
Step	Action
19.	The query results display in a excel file.
20.	This completes **Run an Existing Query**. **End of Procedure.**

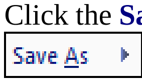
Using Excel to Organize Query Results

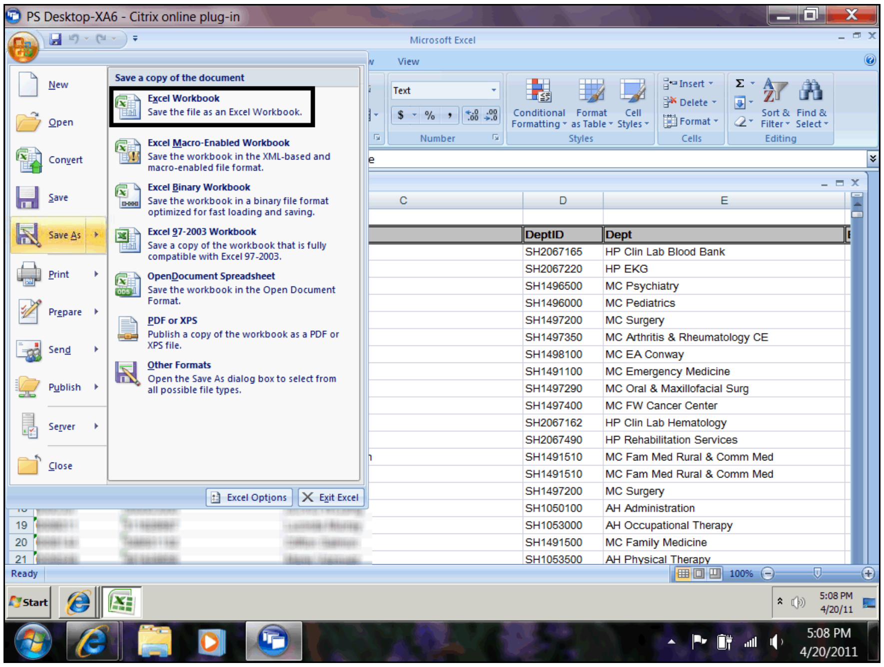
Save a Query in Excel

Procedure

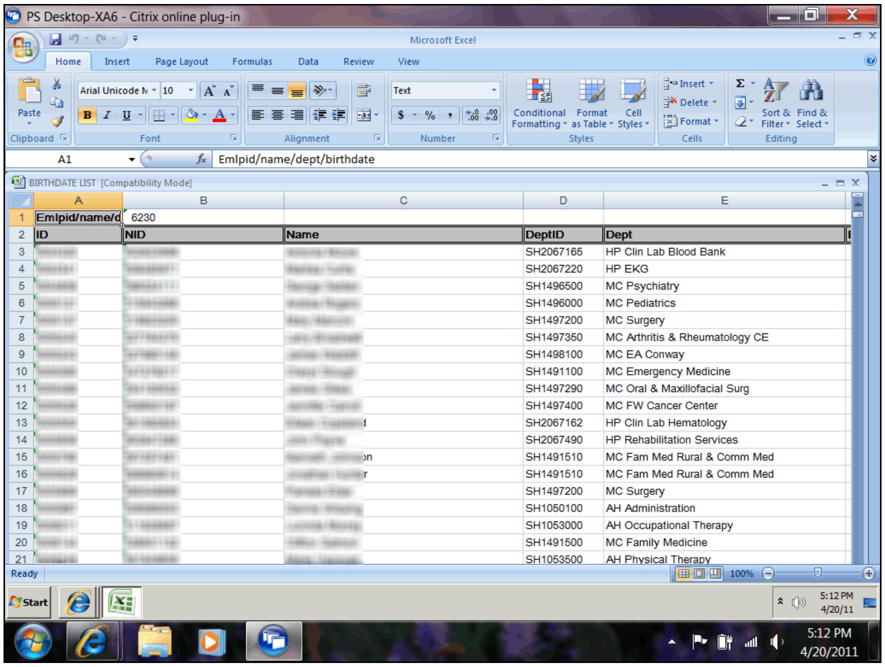
In this topic you will learn how to **Save a Query in Excel**.



Step	Action
1.	After exporting your results into an Excel file, you have the option to save the information for future reference. Click the **Office Button**. 
2.	Click the **Save As** option. 



Step	Action
3.	Click the **Excel Workbook** entry in the list. Excel Workbook
4.	Enter the desired information into the **BIRTHDATE LIST** field. Enter "**BIRTHDATE LIST**".
5.	Click the **Save** button. ***NOTE: The file will automatically save in the "My Documents" of Citrix. This file will not be available in your desktop documents folder.*** Save



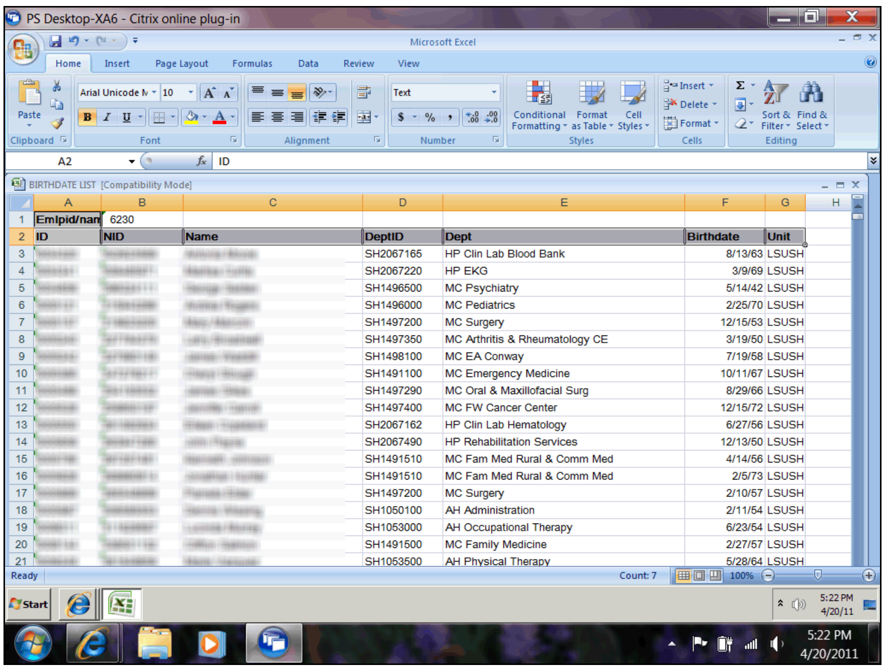
Step	Action
6.	This completes **Save a Query in Excel**. **End of Procedure.**

Auto Filter

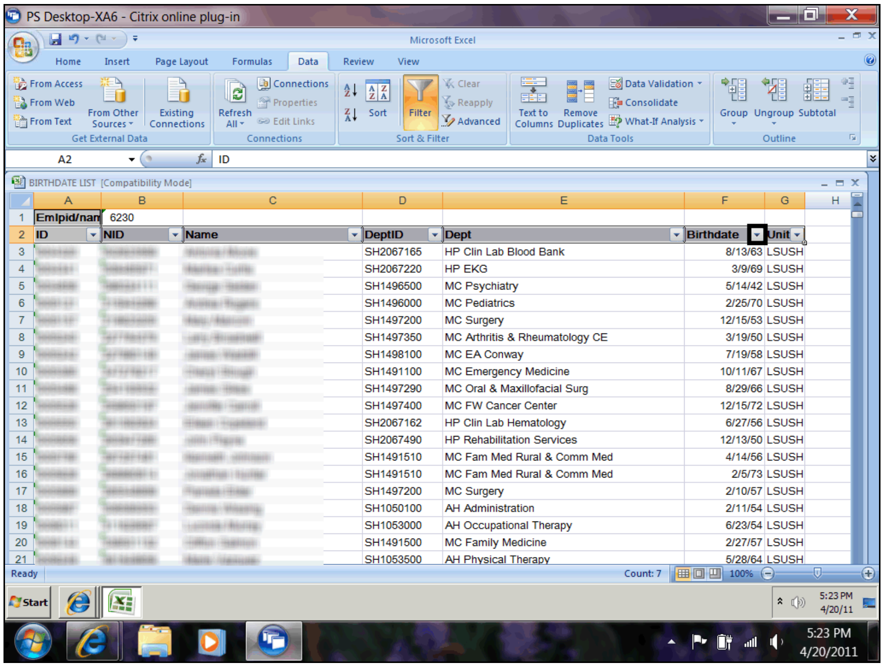
Procedure

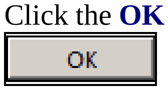
In this topic you will learn how to use **Auto Filter**.

Step	Action
1.	You can use AutoFilter to hide or sort the data in your worksheet. In this example you will filter the data so only employees whose birth year is 1993 will display.



Step	Action
2.	Click the **Sort & Filter** button.
3.	Click the **Filter** option. Filter



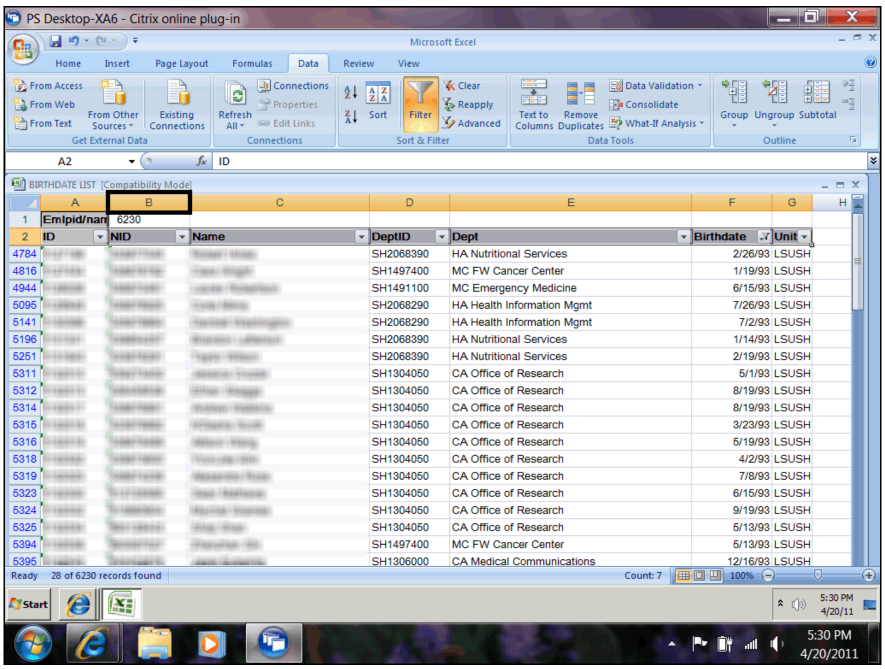
Step	Action
4.	Notice the each column displays a drop-down button. Click the button to the right of the **birth date** field. 
5.	Click the checkbox to the left of the **Select All** option to deselect it. 
6.	Click the **1993** option. 
7.	Click the **OK** button. 
8.	A list of employees who were born in 1993 displays. The filter symbol displays next to the column header to denote that filtering has occurred.
9.	This completes **Auto Filter**. **End of Procedure.**

Delete Columns

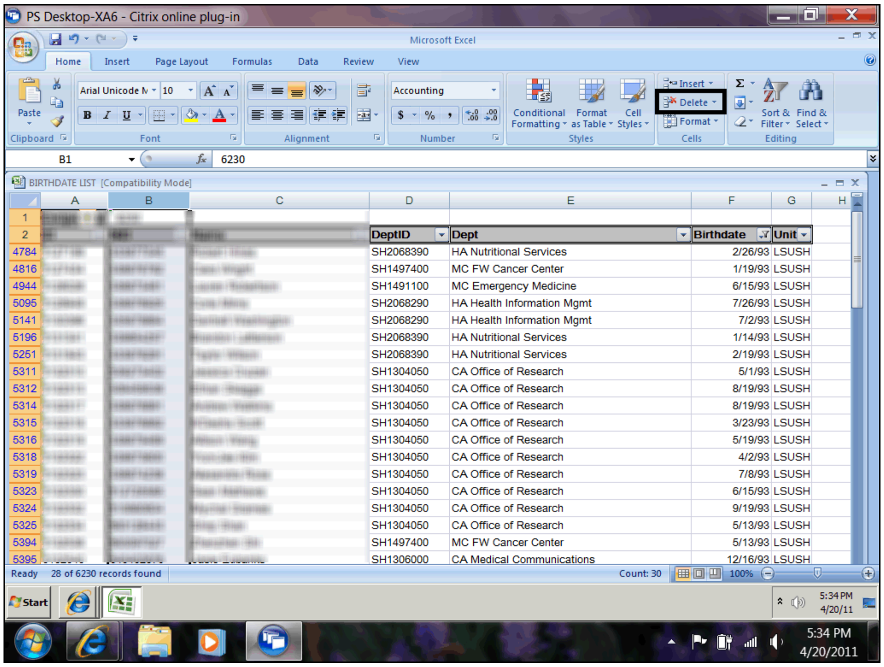
Procedure

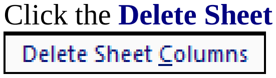
In this topic you will learn how to **Delete Columns**.

Step	Action
1.	The redefined queries in PeopleSoft 9.1 are very general, therefore, there is information included that is not needed by all users. After running your report you can delete any unrelated columns in Excel.



Step	Action
2.	In this example you will delete the NID column. Click the **B** column to highlight the entire column. 
3.	Click the **Home** button. 



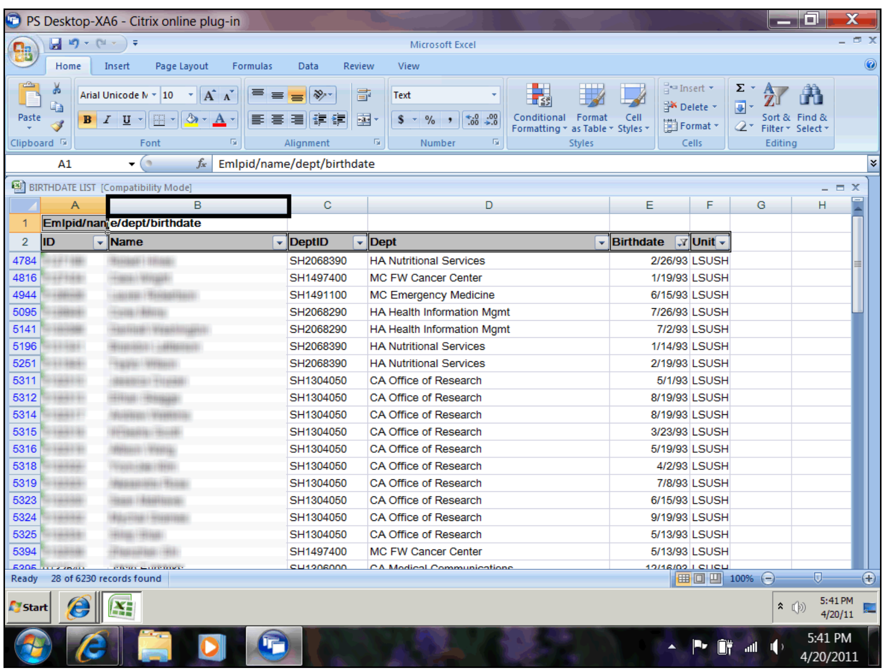
Step	Action
4.	Click the arrow to the right of **Delete**. 
5.	Click the **Delete Sheet Columns** list item. 
6.	The NID column is removed from the spreadsheet.
7.	This completes **Delete Columns**. **End of Procedure.**

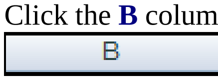
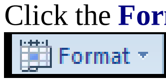
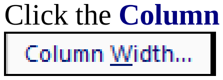
Resize Columns

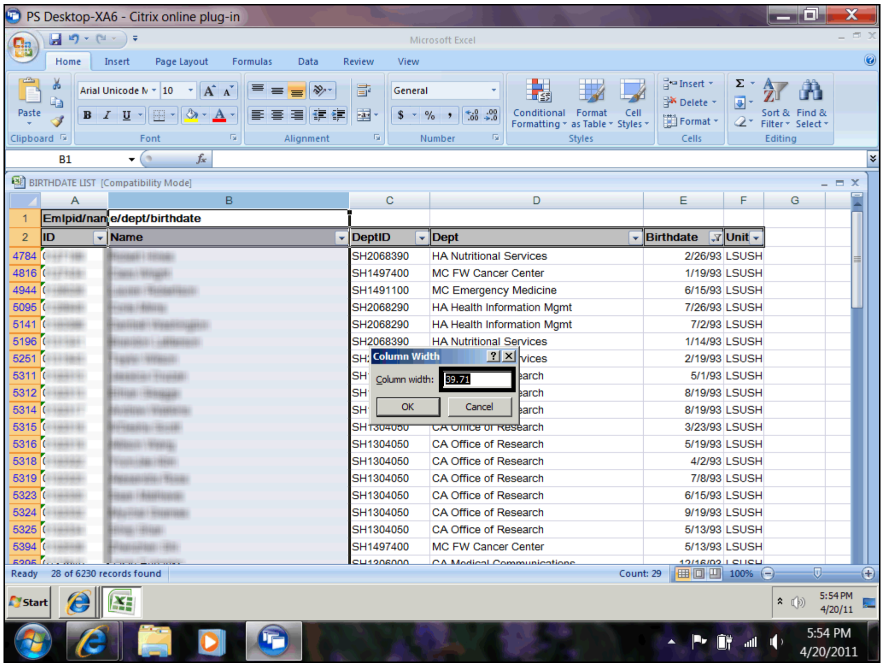
Procedure

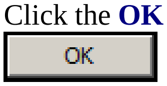
In this topic you will learn how to **Resize Columns**.

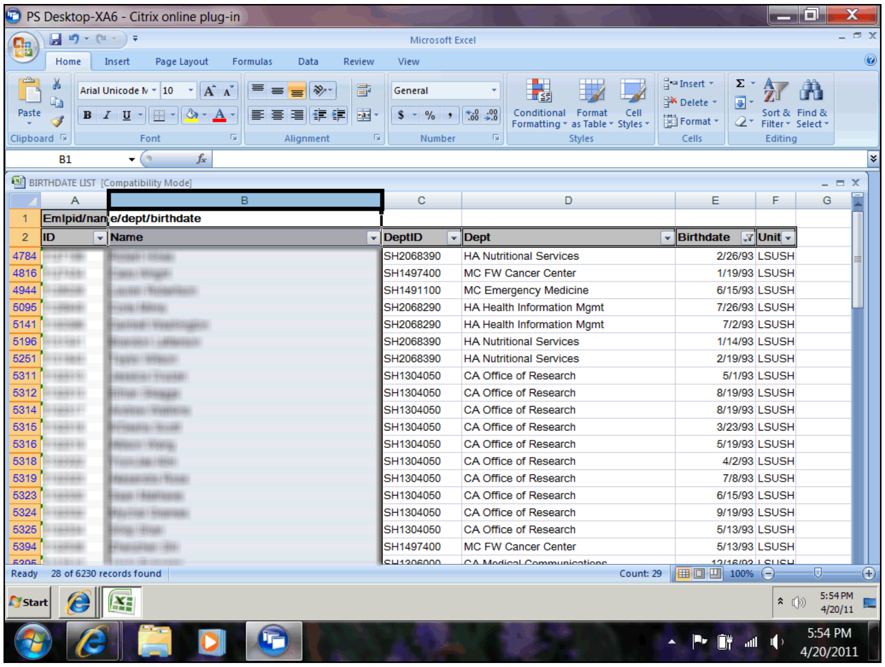
Step	Action
1.	There are two options available for resizing columns: 1) Manually enter the appropriate column width, or 2) Utilize the Excel - Auto Fit option. In this example both options will be demonstrated.

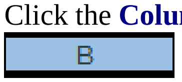
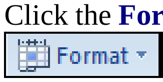
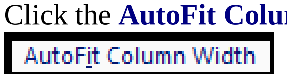


Step	Action
2.	Click the **B** column to highlight the entire column. 
3.	Click the **Format** option. 
4.	Click the **Column Width** list item. 



Step	Action
5.	Enter the desired column width. Enter the desired information into the **Column Width** field. Enter "**45**". ***NOTE: You may have to repeat this option until the column width is correct.***
6.	Click the **OK** button. 

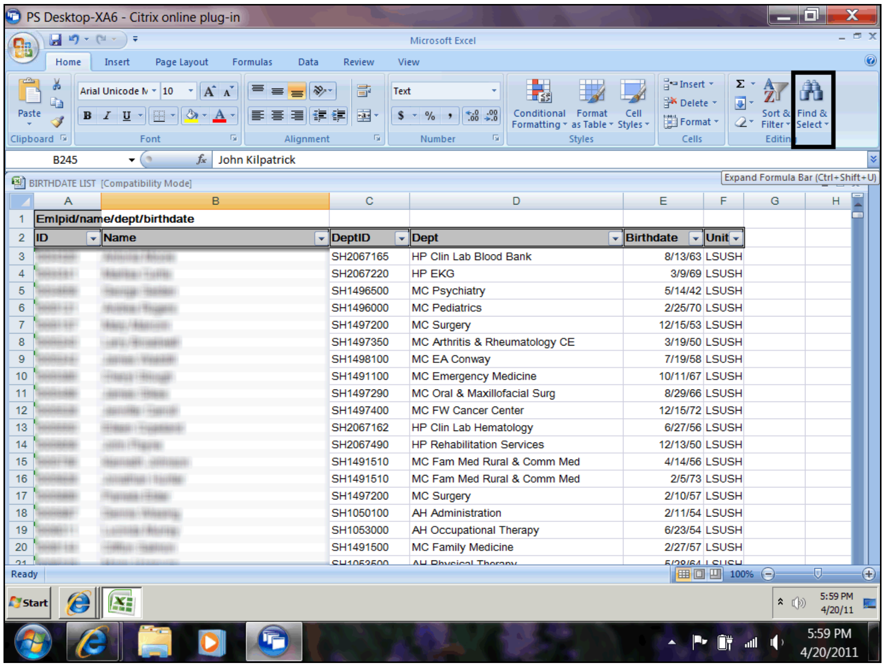


Step	Action
7.	Excel can determine the correct column width for you by using the Autofit option. Click the **Column Heading** you wish to resize. 
8.	Click the **Format** button. 
9.	Click the **AutoFit Column Width** list item. 
10.	The system automatically resized column B.
11.	This completes **Resize Columns**. **End of Procedure.**

Find

Procedure

In this topic you will learn how to use **Find**.

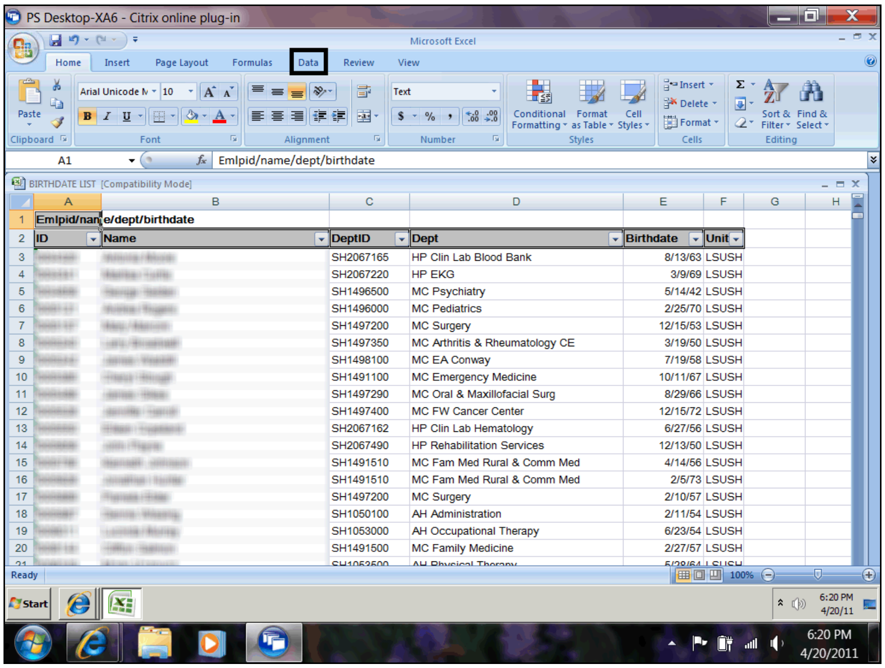


Step	Action
1.	In this example you will find employee names that contain "John". Click the **Find & Select** button.
2.	Click the **Find** option. Find...
3.	Enter the desired information into the **Find what:** field. Enter "**John**".
4.	Click the **Find Next** button. Find Next
5.	The system will take you to the first name containing "John". In this example the system will not differentiate between first names and last names containing "John". You will click the **Find Next** button to search for the next employee name.
6.	This completes **Find**. **End of Procedure.**

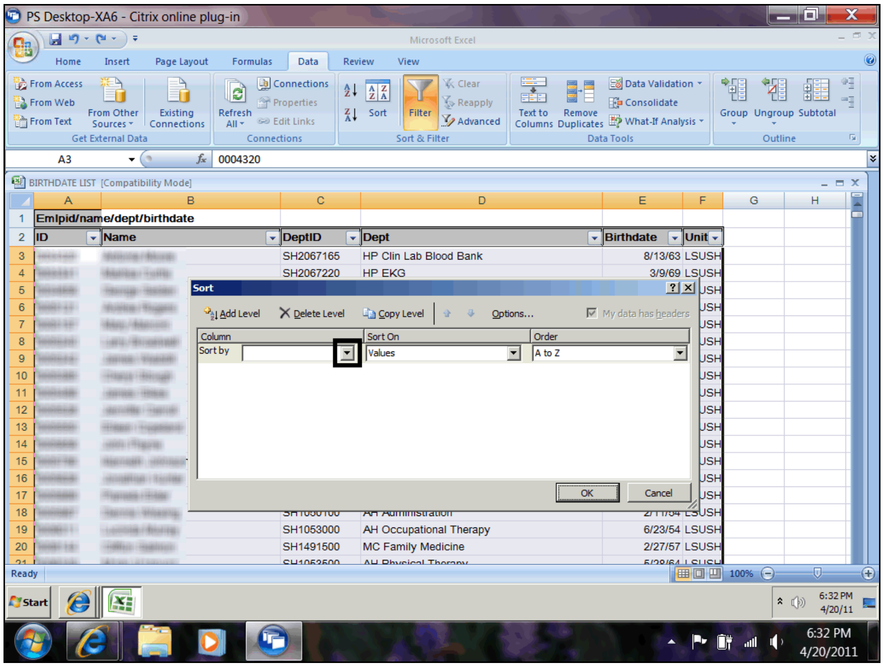
Sort Using Multiple Criteria

Procedure

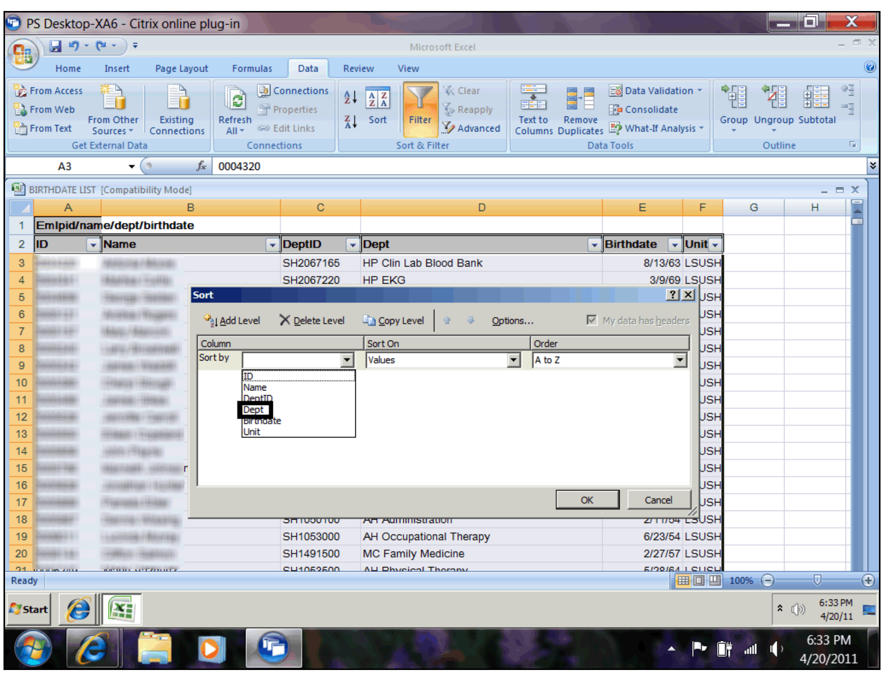
In this lesson you will learn how to **Sort Using Multiple Criteria**.



Step	Action
1.	Click the **Data** button. 
2.	Click the **Sort** button.



Step	Action
3.	Click the button to the right of the **Sort by** field to define the first level of sort. 

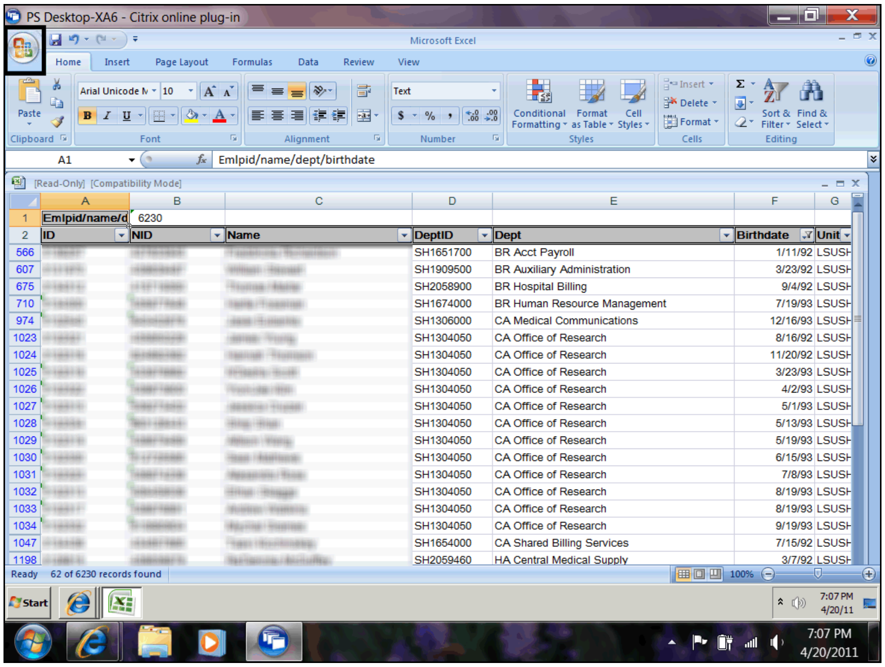


Step	Action
4.	Click the **Dept** list item. Dept
5.	Click the **Add Level** option. Add Level
6.	Click the button to the right of the **Then By** field.
7.	Click the **birth date** list item. Birthdate
8.	Click the **OK** button. OK
9.	The system displays the sorted data.
10.	This completes **Sort Using Multiple Criteria**. **End of Procedure.**

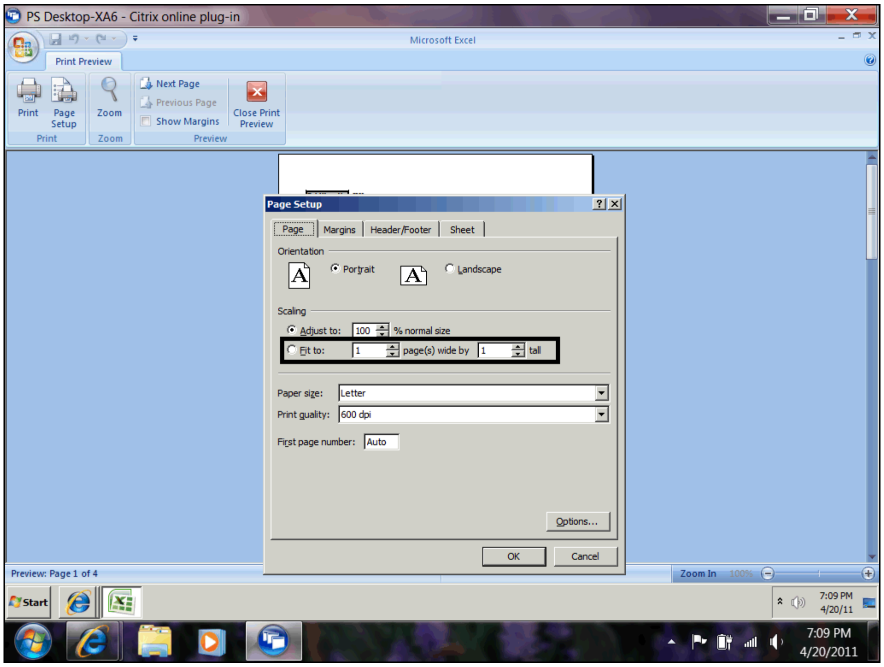
Print Results on One Page

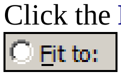
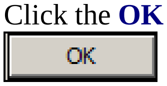
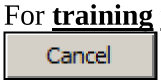
Procedure

In this lesson you will learn how to **Print Results on One Page**.



Step	Action
1.	Click the **Office Button**. 
2.	Click the **Print** list item. Print
3.	Click the **Print Preview** list item. Print Preview
4.	Click the **Page Setup** button.



Step	Action
5.	Click the **Fit to:** option. 
6.	Click the **OK** button. 
7.	Click the **Print** button. 
8.	For **training purposes only**, click the **Cancel** button. 
9.	This completes **Print Results on One Page**. **End of Procedure.**