PEOPLESOFT QUERIES

Delane Swank



Agenda

- Welcome/Introductions
- Today's Schedule
 - What is a Database?
 - Why do we Query?
 - Query Basics
 - PS Query Tab-By-Tab
 - Tips & Tricks
 - Example Queries
 - Questions

PeopleSoft Queries



Delane Swank, IT Business/Tech Analyst

What is a database

da·ta·base noun: database; plural noun: databases

A structured set of data held in a computer, especially one that is accessible in various ways.

What is a database

- Databases provide an efficient way to store, retrieve and analyze data.
- Relational Databases are structured to recognize relations among stored items of information.
- Before Databases, all data was stored in tab limited flat file. Multiple pieces of information called fields were grouped together into a record. Hard to search for content, create reports with only a few fields.

What is a database

- Databases contain a series of tables organized by key fields and unique IDs.
- Relational databases are created using a special computer language, Structured Query Language (SQL).
- Through SQL logic tables are joined to make a single database using Primary Keys, Foreign Keys, Super Keys, Composite Keys, and Compound Keys.

Key Structure in a Table

Class ID (ฅ)	Term (⊶)	Subject	Catalog Number	Classroom
7854	2158	ENG	105	MB102
6543	2158	BIL	112	MM207
3982	2158	MTH	101	MM115
2098	2158	СНМ	345	SCB453
7854	2159	ENG	105	MB102



Why do we Query?

- PeopleSoft is a set of thousands of tables interconnected by PeopleCode (Peoplesoft's proprietary coding language)
- We query in order to store, retrieve, and analyze the data housed in these thousands of tables.



Finding the Right Tables

- Campus Solutions
- http://peoplesoft.wikidot.com/campussolutions-tables
- HRMS (Foundational Tables):
 - https://www.sbctc.edu/resources/docu ments/colleges-staff/dataservices/peoplesoft-ctclink/hcmcommon-tables-for-reporting.pdf
- FSCM (Foundational Tables):
- http://finance.fiu.edu/controller/Docs/C ommonly_Used_Tables.pdf
- ELM
 - https://peoplesofttutorial.com/complet e-list-of-peoplesoft-elm-9-1-tables/
- Query Manager PeopleBooks
- https://docs.oracle.com/cd/E55244_01/p sft/acrobat/pt854tpsq-b0714.pdf

Queries – The Basics



Querying tools

- Most querying tools allow us to **create, retrieve and manipulate** data in tables
- Functional users, usually don't need to (and should never!) **change** (insert, delete or update) database without using the user interface.
- Querying should be done by functional users for **reporting purposes only.**
- To that end, you have access to the Peoplesoft Query tool -PSQuery

PSQuery

- Gives us an easy platform for finding the **right** tables
- Provides us with important information on each table and a nice search tool to find them
- Makes it easy to make the basic query statement
- Organizes our data for us, and provides output options
- Helps us with dependencies and field names

The Basic Query Statement



The Basic Query Statement

Select [field(s)] From [table(s)] Where [criteria]

The Basic Query Statement

- Step 1 know what **fields** you want (**Select**)
- Step 2 find out what tables you need (From)
- Step 3 define your criteria (Where)



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The Basic Query Statement

- SELECT your columns DISTINCT FROM table names
 JOIN table names – Inner Join, Outer Join, Full Join
 WHERE condition
 GROUP BY your columns – COUNT, SUM, AVG, MIN, MAX
 HAVING aggregate column condition
 ORDER BY your columns – ASC, DESC
- Do it all over in a Sub Query?



Where do I begin?

- Begin with a whiteboard, or a pen and paper
- Define your SQL statements
- Think about your fields, criteria, and prompts
- When you're learning, start fresh every time, eventually, you will know the data well enough to build a basic query very quickly!



PSQUERY – Tab-By-tab

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Query Name New Unsaved Query Description	🔝 Feed 👻
*Search By [Record Name v begins with]	
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Records Tab

- Use the Search feature to find your records (tables)
- Bring in tables one at a time. Know your criteria, and then join
- Always go with the most basic tables you can find
- I would suggest avoiding views – Unless you know what is in it?

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LASS ASSOC - Class Associations	Add Record	Show Fields	
LASS_ASSO_SCTY - Class Assocs Security Search	Add Record	Show Fields	
LASS_ASSO_SRCH - Class Associations Search	Add Record	Show Fields	
LASS_ATTENDNCE - Student Class Attendance	Add Record	Show Fields	
LASS_ATTRIBUTE - Class Attribute Table	Add Record	Show Fields	
LASS_CF_TBL - Appropriations	Add Record	Show Fields	
LASS_CHRSTC - Class Characteristics Table	Add Record	Show Fields	
LASS_COMPONENT - Class Components	Add Record	Show Fields	
LASS_EXAM - Class Exam	Add Record	Show Fields	
LASS_FEE_TBL - Class Fee Table	Add Record	Show Fields	
CLASS_INSTR - Class Instructor Table	Add Record	Show Fields	
LASS_INSTR_VW - Class Instructor Table View	Add Record	Show Fields	
LASS_INSTR_VW2 - Class Instructor View2	Add Record	Show Fields	
CLASS_MTG_PAT - Class Meeting Pattern Table	Add Record	Show Fields	
CLASS_MTG_PT_VW - Class Tbl/Mtg Pattern View	Add Record	Show Fields	
CLASS_MTG_SE_VW - Class Mtg Student Enrl View	Add Record	Show Fields	
CLASS_MTG_VW - Class Meeting Pattern View	Add Record	Show Fields	
CLASS_MTG_VW2 - Class Meeting View2	Add Record	Show Fields	
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CLASS_NOTES - Class Notes CLASS_NOTES_LNG - Related Lang-Class Notes Table	Add Record	Show Fields	
CLASS_NOTES - Class Notes CLASS_NOTES_LNG - Related Lang-Class Notes Table	Add Record	Show Fields	

Records Tab

- Click on Show fields to get to this page examine what is in it
- Click on Add record to create a query with that record.
- Search and add more to create joins
- Keys are marked with a Y in front Example has a composite key with 6 fields

Fie	Idname Personalize Find 🖉 🔜 First 🕚 1-23 of 23				
Kev	Description				
Y	CRSE ID - Course ID				
Y	CRSE_OFFER_NBR - Course Offering Nbr				
Y	STRM - Term				
Y	SESSION_CODE - Session				
Y	ASSOCIATED_CLASS - Associated Class				
	UNITS_MINIMUM - Minimum Units				
	UNITS_MAXIMUM - Maximum Units				
	UNITS_ACAD_PROG - Academic Progress Units				
	UNITS_FINAID_PROG - Financial Aid Progress Units				
	GRADING_BASIS - Grading Basis				
	GRADE_ROSTER_PRINT - Grade Roster Print				
	SSR_COMPONENT - Course Component				
	BILLING_FACTOR - Billing Factor				
	CRSE_CONTACT_HRS - Course Contact Hours				
	RQRMNT_GROUP - Requirement Group				
	USE_CATLG_RQS - Also Use Catalog Requisite				
	RQMNT_DESIGNTN - Requirement Designation				
	CRSE_COUNT - Course Count				
	INSTRUCTOR_EDIT - Instructor Edit				
	USE_BLIND_GRADING - Use Blind Grading				
	SEL_GROUP - Tuition Group				
	COMPONENT_PRIMARY - Primary Component				
	LIPDATE STONT ENRL - Lindate Student End				

Query Tab

- Don't be too eager to select too many fields
- You can define criteria here, or on the criteria page (when starting out, use the criteria page
- Always check to make sure your table makes sense before joining it in

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Expressions Tab

- A means of defining your SQL statement – usually used in Select & Where statements
- For now, we will only define expressions on the criteria page
- Anything that can be used in an Oracle database* can be used in an expression
- The internet is a great resource to find expressions

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2 A.STRM - Term	Char4				Term	8	Edit		
3 A.GRADING_BASIS - Grading Basis	Char3				Grading	8	Edit		
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Prompts Tab

- Prompts are also known as bind variables
- Prompts are completely user configurable – you can decide the length, the format, the edit type*, and specify a default value

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tecords Query Expressions Prompts Fields Criteria Having	Dependency	Transfo	rmations View SQL Ru	ın
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		Select a Prompt Table Personalize Find View Al 🖓 🗰 Finst 🗳 1 of 1 🛄 Last INSTITUTION_TBL=Institution_Table
OK Cancel		

Fields Tab

- You can use the field tab to define the display information for your fields.
 Based on the tables you choose, these will be defined for you – however (as with everything else) they are configurable
- You can always change the field header
- Keep an eye out for translate values that can display several different sets of values based on your choice

LOS RIOS CSPRD

Query Name New Unsaved Query				Desc	ription		5	Feed -	
view field properties, or use field as criteria in query stat	ement.					Reord	der / Sort		
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2 A.STRM - Term	Char4				Term	9.	Ed	it 📃	
3 A GRADING_BASIS - Grading Basis	Char3				Grading	9	Ed	it 📃	
4 A CRSE_COUNT - Course Count	Num3.2				Crse Count	9.	Ed	it 📃	
5 A.RQRMNT_GROUP - Requirement Group	Char6				Rq Group	9.	Ed	it 📃	
6 A COMPONENT_PRIMARY - Primary Component	Char3				Component	%	Ed	it 📃	
7 A.UPDATE_STDNT_ENRL - Update Student Enrl	Char1				Updt Stdnt Enrl	%	Ed	it 📃	
Save Save As New Query Preferen	nces P	roper	lies	P	ublish as Feed Pi	ublish as Pivo	t Grid		New Unit

Reporting Tools T > Query T > Query Manag

Edit Field Properties

Field Name A.DEGR_CHKOUT_STAT - Degree Checkout Status

Heading	Aggregate	Translate Value
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Edit Field Ordering

OK Cancel

Reorder columns by entering column numbers on the left. Columns left blank or assigned a 0 will be automatically assigned a number. Change the order by number by entering numbers on the right. To remove an order by number, leave the field blank or enter a 0.

Edit Field Ord	ering	Personalize Find View All	<u> 🖾 🗎</u>	First 🚺 1	-19 of 19 💵 Last
New Column	Column	Record.Fieldname	Order By	Descending	New Order By
	1	A.EMPLID - Empl ID			
	2	A.ACAD_CAREER - Academic Career			
	3	A.STDNT_CAR_NBR - Student Career Nbr			
	4	A.EFFDT - Effective Date			
	5	A.EFFSEQ - Effective Sequence			

Fields Tab

- You can always change the field header
- Keep an eye out for translate values that can display several different sets of values based on your choice

Criteria Tab

- Define your fields
- Choose your Operand (and, or, >, <, >=, <=, between, in list, like, equal to, not equal to, not in list, not like)
- Be smart with your Operand!

DS RIOS CSPF	ad sector and the sector and s
Criteria Properties	
Choose Expression 1	Expression 1
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*Condition Ty	vpe equal to 👻
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Criteria	Tab
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Having (and aggregate functions) Query Name New Unsaved Query Description Feed -Reorder / Sort View field properties, or use field as criteria in query statement nd | View All | 🖓 | 🛗 First 🚺 1-5 of 5 🖸 La Fields Ord XLAT Agg 1 A.EMPLID - Empl ID Char11 ID 8 Edit 2 Edit 2 A.ACCOUNT_TERM - Account Term Char4 Acct Term 3 A.ACCOUNT_TYPE_SF - Account Type Char3 Acct Type 8 Edit 📃 4 A.ACCOUNT_BALANCE - Account Balance SNm16.2 Sum Sum Balance 9 Edit 5 A.ACAD_YEAR - Academic Year Char4 Acad Year 8 Edit Save Save As New Query Preferences Publish as Pivot Grid Properties Publish as Feed New Unio Edit Field Properties Records Query Expressions Prompts Fields Criteria Having Dependency Transfo View SQL Run Field Name A ACCOUNT BALANCE - Account Balance Query Name New Unsaved Query Description Feed -Heading Aggregate Add Having Criteria None Group Having Criteria No Heading 💿 RFT Short Sum ng Criteria Personalize | Find | 🖓 | 🛗 🛛 First 🚺 1 of 1 💟 Last O Text RFT Long Count Heading Text Sum Balance dition Type 🔍 Min AACCOUNT_BALANCE -Account Balance greater than 0 Edit Max *Unique Field Name A.ACCOUNT_BALANCE Average Save Save As New Query Preferences Properties Publish as Feed Publish as Pivot Grid New Union OK Cancel



Query is invalid. You must choose at least one record from the records tab and then select one field on the query tab or use an expression as a field before the query sql can be viewed. For queries with subqueries or unions, at least one record from the records tab in each subquery or union must be selected also.

Run Tab

- Once you run the query, you can download the output to excel
- Rerun your query to enter new bind variables (prompts values)

Reporting Tools 🔻 > Query 🔻

Main M

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

	Course ID	Offer Nbr	Term	Session	Assoc	Min Units	Max Units	Prgrss Unt	FA Units	Grading	Roster	Component	BillFactor	Crs Cntct (Rq Group	Catig Rqs	Designation	Crse Count	Instr Edit	Blind Grd	Group	Component	Updt Stdn Enrl
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8	022321	1	1193	FT	17	3.00	3.00	3.00	3.00	GRD	С	LEC	1.000	3.00		Y		1.00	N	N		LEC	N
9	022321	1	1193	FT	18	3.00	3.00	3.00	3.00	GRD	С	LEC	1.000	3.00		Y		1.00	Ν	N		LEC	N
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11	022321	1	1193	FT	20	3.00	3.00	3.00	3.00	GRD	С	LEC	1.000	3.00		γ		1.00	Ν	N		LEC	N
12	022321	1	1193	FT	21	3.00	3.00	3.00	3.00	GRD	C	LEC	1.000	3.00		Y		1.00	Ν	N		LEC	
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SAVE your work!

- Save your query for future use
- Query Type: Archive, Process, Role, User (preferred)
- Owner: Public Vs Private Queries

*Query	
Description	
Folder	
*Query Type	User •
*Owner	Private •
Query Definition	on:
OK	Cancel
	Current

Enter a name to save this guery as:

Things to Remember Some Tips & Tricks



Some Caveats

- Always define some criteria first (you don't want to try and retrieve 100K rows of data
- Limit your results with criteria/prompts when you are testing.
- Check your work early and often
- Have good joining practices (don't automatically go with what PSQuery gives you, double check)
- **Think** about what you are asking the database to provide you with
- Look at your SQL statement understanding how the criteria factor into the query is the key

EA.

Some Caveats

- Be smart, know more about your pages
 - Talk to programmers about records (fields) on a page (Application Designer)
 - Hit Ctrl+J (or J+Ctrl) Provide Page, Component, Menu details
 - Watch out for work records used in PeopleSoft for presenting data
 - Use Plugins to identify records, manage links and features (Free ones exist for Google Chrome)
 - View Page Source and get some information
 - Watch out for Page Source Vs Frame Source



PSChrome Offered by: melban.me

Usability features without PeopleSoft customizations.



PS Utilities Offered by: Uffe Graakjaer

PeopleSoft Utilities - increase usability and productivity.

Example Queries



