

INTRODUCTION

By this time, you will have completed the Fundamentals of Database Structure class in order to continue through the BGSU PeopleSoft Query Course. This class is designed to guide users having Query Viewer access through a Basic search. This document is to be used as a reference guide and to be used in conjunction with the associated User Productivity Kit (UPK) – View a Query.

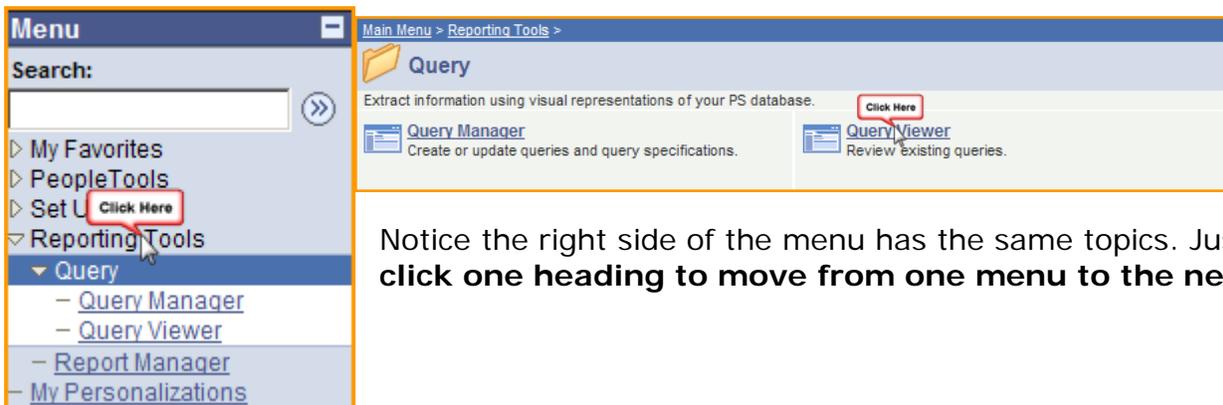
This class is designed for CSS, FMS, and HCM. These instructions assume the use of Internet Explorer. The Firefox browser must be used on the Macintosh system; for assistance with the Firefox browser contact ITS Tech Support at 419-372-0999.

A query is a question or a request for information. View a Query User Guide provides basic instructions on using Query Viewer. Query Viewer is a PeopleSoft end user reporting tool. With Query Viewer you can access preexisting queries or requests for information created by other users. A user who creates queries may place the results in a public file that can be *viewed* by other users.

If using this guide as a reference tool, sign in to the correct database (CSS or FMS). The navigation menu that appears below may look very different from your navigation menu; a user's security access determines the components which are available to them.

Once signed in to the system, **select Reporting Tools** from the menu pagelet.

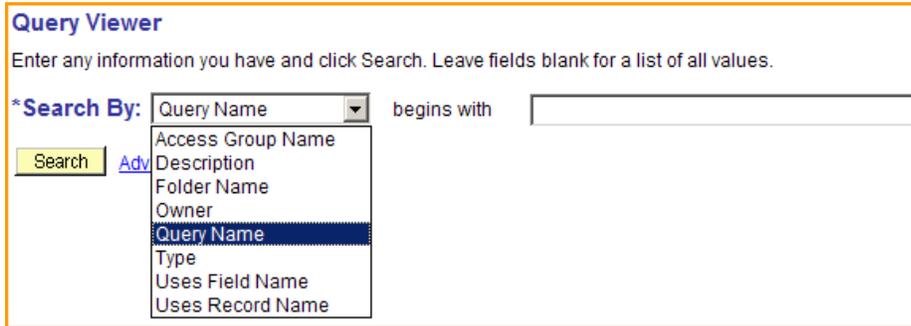
Next, **select Query Viewer**.



Notice the right side of the menu has the same topics. Just **click one heading to move from one menu to the next.**

Basic Search

A *Basic Search* page will appear. In the **Search By** field, the *criterion* set at **Query Name** and the query name is **HR**.



Query Viewer
Enter any information you have and click Search. Leave fields blank for a list of all values.

***Search By:** Query Name begins with

[Adv](#)

- Access Group Name
- Description
- Folder Name
- Owner
- Query Name**
- Type
- Uses Field Name
- Uses Record Name

Criteria Descriptions:

Access Group Name – The name assigned to a functional query security group. This is the same name used for the corresponding Query Tree.

Description – The name used to describe the purpose of the query (e.g. Track Students by Advisor). The description is entered by the person who created the query when first saved. Enter words that appear in the description of the query.

Folder Name - The name used to describe the folder where the query is stored. Folders can be used to categorize queries (FA ISIR, Financial Aid Institutional Information Record). The folder name is entered by the person who created the query when saved.

Owner - Designates private or public and is assigned by the person who created the query. *Public* queries can be executed, opened, modified and deleted by anyone with proper security access. *Private* queries can only be executed, opened, modified, and deleted by the person who created the query.

Query Name - The name assigned when the query is saved. Enter the beginning of the query name or a partial name. Be aware there are standards for naming both private and public queries (discussed in Query Manager Class).

Type - The name used to describe the function of the query: Archive, Process, Role, and User. The type is selected by the person who created the query when it was saved. End-users will generally use the User query type.

In the example below, we are searching by query name.

Query Viewer
Enter any information you have and click Search. Leave fields blank for a list of all values.

***Search By:** Query Name begins with

[Advanced Search](#)

Search By: Query Name

The query name is not always known to a user. When a query name is not known Advanced searching can be performed. Advanced searching is discussed in the View a Query with a Prompt UPK.

The question being asked is “what is the Job Code for a Statistics Clerk?” Given this information, what area or office would have information on employee job codes?

Query Viewer
Enter any information you have and click Search. Leave fields blank for a list of all values.

***Search By:** Query Name begins with

[Advanced Search](#)

Use HR_

After the information has been placed in the appropriate fields **click Search**. The search provided results for all queries with HR_ in the query name. Two search results were generated for this example.

Search Results

*Folder View: -- All Folders --

| Query | Description | Owner | Folder | Run to HTML | Run to Excel | Schedule | Add to Favorites |
|--------------------|----------------------|--------|--------|----------------------|-----------------------|--------------------------|--------------------------|
| HR_KW_CLA_JOBCODES | Classified Job Codes | Public | | HTML | Excel | Schedule | Favorite |
| HR_KW_JOBCODES | Job Code Listing | Public | | HTML | Excel | Schedule | Favorite |

How do you view the results of the query? There are two options for viewing the query results. You can display the results as a web page by clicking the HTML link or send the results to an Excel spreadsheet by clicking the Excel link.

In this example, we are looking for a listing of Job Codes. The description of the **HR_KW_JOBCODES** query is 'Job Code Listing.' To view the results for this query, **click HTML**; this allows the results to be viewed in a web page format.

*Search By: Query Name begins with HR_

Search Advanced Search

Search Results

*Folder View: -- All Folders --

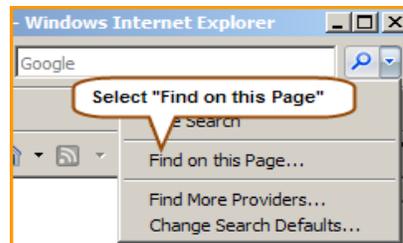
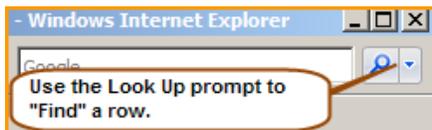
| Query Name | Description | Owner | Folder | Run to HTML | Run to Excel | Schedule | Add to Favorites |
|--------------------|----------------------|--------|--------|-------------|--------------|----------|------------------|
| HR_KW_CLA_JOBCODES | Classified Job Codes | Public | | HTML | Excel | Schedule | Favorite |
| HR_KW_JOBCODES | Job Code Listing | Public | | HTML | Excel | Schedule | Favorite |

Often times, queries can have thousands of results. This example has 604 results. By default, only 100 rows are displayed. However, **click View All** allows you to view all 604 rows using the scroll bar.

View All 1-100 of 604 Last

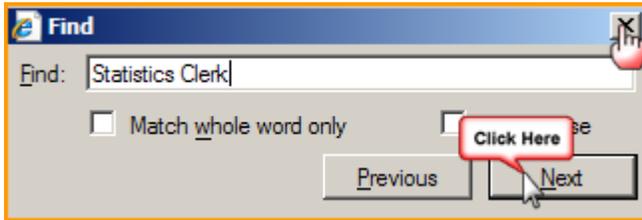
| SetID | Job Code | Eff Date | Descr | Job Funct | Sal Plan | Grade | Step | Std Hrs/Wk | Reg/Temp |
|-------|----------|----------|------------|----------------------|----------|-------|------|------------|----------|
| 1 | BGHCM | 12111 | 01/01/1910 | Clerk 1 | CLA | C01 | 002 | 1 | 40.00 R |
| 2 | BGHCM | 12111T | 01/01/1910 | Intermittent Clerk 1 | INT | INTE | G02 | 1 | 40.00 T |

Scrolling through 604 results will be time consuming. A short cut to "find" a particular job code is to use the magnifying glass or look up prompt  in the top right corner of the menu bar.



The method used to create this material refers to the use of Internet Explorer; if a viewer is using a different browser he/she might have different methods and commands.

The prompt leads to a Find window; **type "Statistics Clerk" in the Find field.**



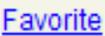
Click Next.
Click "X" to close window.

The row containing the matching text has the job code 12121. We have found the answer to our question; 12121 is the job code for Statistics Clerk.

| | SetID | Job Code | Eff Date | Descr | Job Funct | Sal Plan | Grade | Step | Std Hrs/Wk | Reg/Temp |
|----|-------|----------|------------|-------------------------------|-----------|----------|-------|------|------------|----------|
| 1 | BGHCM | 12111 | 01/01/1910 | Clerk 1 | CLA | C01 | 002 | 1 | 40.00 | R |
| 2 | BGHCM | 12111T | 01/01/1910 | Intermittent Clerk 1 | INT | INTE | G02 | 1 | 40.00 | T |
| 3 | BGHCM | 12112 | 01/01/1910 | Clerk 2 | CLA | C01 | 003 | 1 | 40.00 | R |
| 4 | BGHCM | 12113 | 01/01/1910 | Clerical Specialist | CLA | C01 | 005 | 1 | 40.00 | R |
| 5 | BGHCM | 12113T | 01/01/1910 | Intermittent Clerical Spclist | INT | INTE | G05 | 1 | 40.00 | T |
| 6 | BGHCM | 12115 | 01/01/1910 | Clerical Supervisor | CLA | C01 | 006 | 1 | 40.00 | R |
| 7 | BGHCM | 12121 | 01/01/1910 | Statistics Clerk | CLA | C01 | 006 | 1 | 40.00 | R |
| 8 | BGHCM | 12131 | 01/01/1910 | Telephone Operator 1 | CLA | C01 | 003 | 1 | 40.00 | R |
| 9 | BGHCM | 12132 | 01/01/1910 | Telephone Operator 2 | CLA | C01 | 004 | 1 | 40.00 | R |
| 10 | BGHCM | 12134 | 01/01/1910 | Telephone Supervisor | CLA | C01 | 008 | 1 | 40.00 | R |

To close out the HTML page **click the  button.** Once the HTML page is closed the system places the viewer at the Query Viewer main search page.



If a query is used often, the query can be saved to "Favorites". Adding a query to "Favorites" is as easy as **clicking the Favorites  link.**



There are two ways queries can be removed from My Favorite Queries. First, **click the  remove link**. The second way removes *ALL* queries from My Favorite Queries; **click **.

| Query Name | Description | Owner | Folder | Run to HTML | Run to Excel | Schedule | Remove |
|-----------------|--|--------|--------|-------------|--------------|----------|---|
| HR_KW_JOB_CODES | Clear the Favorites List will clear ALL queries in My Favorites. | Public | | | | |  |

Clear Favorites List