Running PeopleSoft Queries to Excel
Through Query Viewer

1. In PeopleSoft , in either the Test or Production Database, navigation***: Reporting Tools > Query > Query Viewer***

- *If you're in the Production Database, the Wesleyan logo will appear at the upper left.*
- *If you're in the Test Database, "Oracle" will appear at the upper left.*

2. If you know the name of the query you'd like to run, you can type all or part of the name into the box next to "begins with."

3. Click the yellow Search button (or hit Enter).

4. If you typed the name of a query, only that one query will be listed. Otherwise, a listing of queries will appear.

5. If you would like to create a list of Favorite queries that you use most often, click on the blue Favorite to the right of the query you'd like to add.

6. **To run a query to Excel,** find the query you would like to run and click on the blue Excel link toward the right.

   a. *Queries without Prompts:* If this query does not prompt you for criteria, you will see one of the following dependent upon your browser.

      i. If your browser is Internet Explorer, a page will open with the name of the query and this line:

         Download results in :   Excel SpreadSheet   CSV Text File   (76 kb)

         1. Click on Excel SpreadSheet and the spreadsheet will open.

      ii. If your browser is Mozilla Firefox, a popup box will appear:

         1. You can either open the Excel now to view it now or save it to view later.

b. ***Queries with Prompts:*** If this query uses a prompt, a page with one or more boxes similar to this appears:
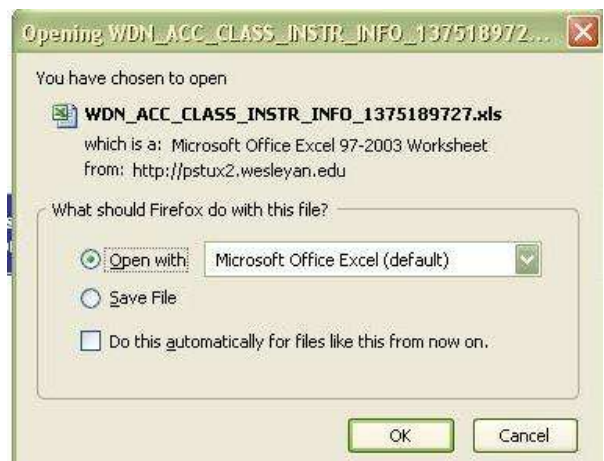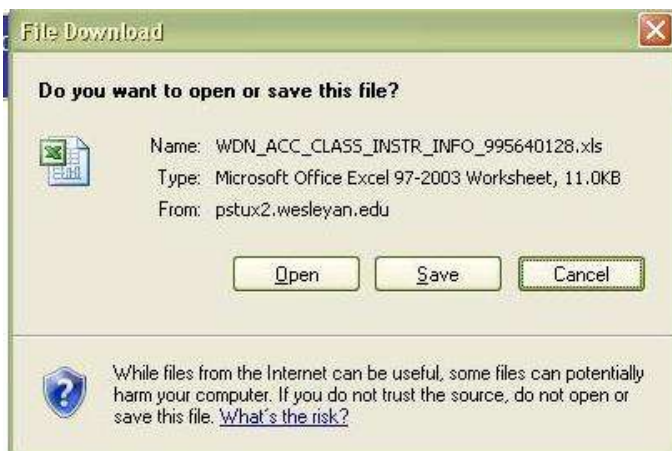
Enter ID: ⬚ 🔍
View Results

	ID

   i. The text beneath the prompt(s) is a display of the names of the fields that will be shown when the query is run. In this example, the field name "ID" is shown.
   ii. Enter the desired criteria in the prompt box(es).
   iii. If one of the prompted items is the Admit Term, the Admit Term must be entered (and you cannot use a wildcard for the Admit Term).
   iv. Wildcards: If the phrase "(% to see all)" is part of the prompt, you can enter a % sign to see everything in that field. You may enter a code in one box and a % in another.
   v. To narrow down the selection in a prompt with a wildcard:
      1. You may enter the entire name.
      2. Or you may use the wild card (%) in conjunction with the first few letters of the name, for example, ABC%
   vi. Do <u>not</u> leave any prompts blank; they will not return any results. At a minimum, any field with the phrase "(% to see all)" must have the % filled in.
   vii. Click View Results or hit Enter.
   viii. Depending on which browser you're using, a popup window similar to one of these will appear:

Internet Explorer

File Download

Do you want to open or save this file?

Name: WDN_ACC_CLASS_INSTR_INFO_995640128.xls
Type: Microsoft Office Excel 97-2003 Worksheet, 11.0KB
From: pstux2.wesleyan.edu

[Open] [Save] [Cancel]

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Mozilla Firefox

Opening WDN_ACC_CLASS_INSTR_INFO_137518972...

You have chosen to open

WDN_ACC_CLASS_INSTR_INFO_1375189727.xls
which is a: Microsoft Office Excel 97-2003 Worksheet
from: http://pstux2.wesleyan.edu

What should Firefox do with this file?

◉ Open with   Microsoft Office Excel (default)
○ Save File
☐ Do this automatically for files like this from now on.

[OK] [Cancel]

   ix. To save a query without viewing the Excel :

      1. If you wish to save the Excel file, click the Save button in Internet Explorer or click on Save File in Firefox.

2. Save the Excel file where you wish. You can use the name supplied, but it is best to choose your own name.
3. If you don't wish to look at the file at this time:
4. In Internet Explorer, the Download Complete popup will appear (see below). Click Close. The Excel file has been saved.
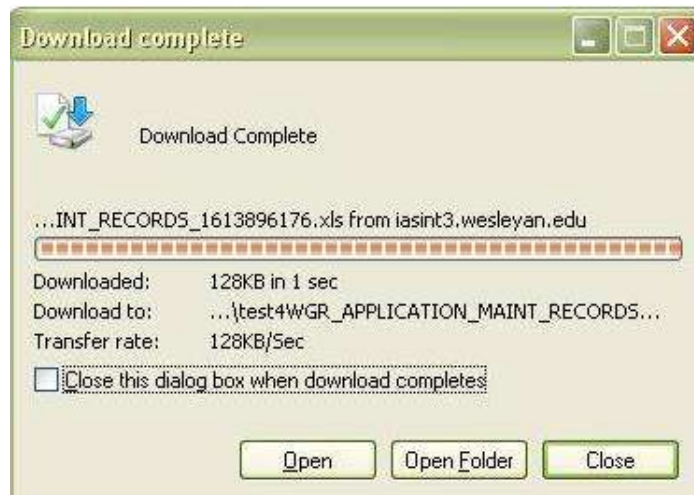
x. **In Mozilla Firefox**, a small box will pop up stating that "All files have finished downloading. " The Excel file has been saved. A menu of downloads is available if you click on the Firefox icon.

xi. **To view the Excel file before saving:**

1. If you wish to view the Excel file before saving it
    a. In Internet Explorer, click Open.
    b. In Mozilla Firefox, click on Open With, leaving the default Microsoft Office Excel
2. The Excel file will appear. Name and save the Excel file.

xii. **Rerunning the query:**

1. If you would like to rerun the query, access the prompt page again
2. You can change the criteria and create a new Excel file.