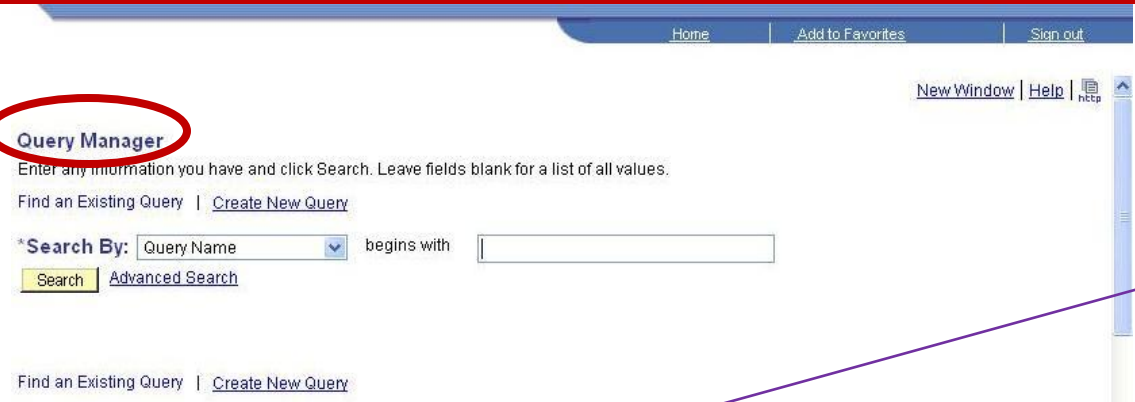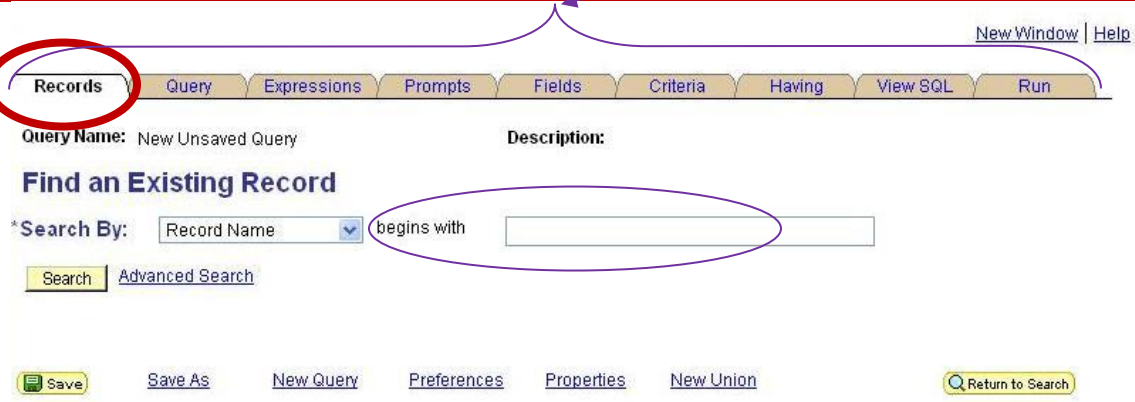# A Visual Demonstration of the PeopleSoft Query Process

The following is a visual outline of the basic Query process steps employing screenshots of the most commonly used pages in Query Manager. This supplements detailed materials found under **QUERY TOOLS AND REFERENCES**, especially **Query Manager Pages**, and under **QUERY INSTRUCTION**. (The records shown correspond to those found in the Introductory Course, Lesson 7: Mastering Record Joins and Selection Criteria.)

BEGINNING A NEW QUERY	
	1. Query Manager Page: Click on the Create New Query link. The following page opens displaying the **Records Page**. Note that there are nine tabs that correspond to the pages in Query. These tabs are available as you create your query.
	2. Records Page: If you know the Record Name, type it next to "begins with." *Tip: you can type just the beginning letters and/or use a wild card (%).*
	3. Records Page: Clicking on the Search By dropdown, gives you other search options besides Record Name. *As with the Record Name, you can type just the beginning letters and/or use a wild card (%).*

New Window | Help | http

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

Query Name: New Unsaved Query   Description:

Find an Existing Record

Record Name:	begins with ▼	
Description:	begins with ▼	
Uses Field Name:	begins with ▼	
Access Group Name:	begins with ▼	🔍

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

[Search]   [Clear]   Basic Search

💾 Save   Save As   New Query   Preferences   Properties   New Union   🔍 Return to Search

4. Records Page:
Clicking on the Advanced Search link opens additional search options to enable you to further refine your choice.

New Window | Help | http

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

Query Name: New Unsaved Query   **Description:**

Find an Existing Record

*Search By: Record Name ▼   begins with   PERS_DATA_SA_VW

[Search] Advanced Search

Search Results

Record		
	Customize	Find	View All	⊞ First ◄ 1 of 1 ► Last	
Recname	Add Record	Show Fields
PERS_DATA_SA_VW - Common Person Information	Add Record	Show Fields

💾 Save   Save As   New Query   Preferences   Properties   New Union   🔍 Return to Search

5. Records Page:
Once you have entered your criteria and have clicked Search, if there are any matches, the Search Results grid opens. If you are ready to use this Record, click Add Record. The **Query Page** opens (See Item 7).
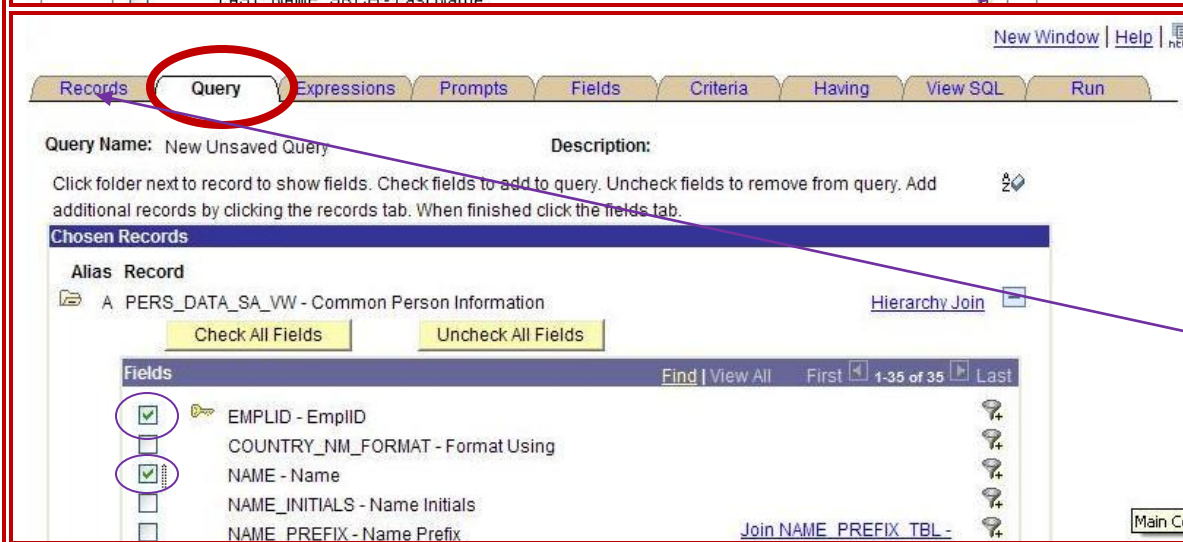

Fields for record PERS_DATA_SA_VW - Common Person Information:

Fieldname	Customize	Find	⊞ First ◄ 1-35 of 35 ► Last
Key	Description
Y	EMPLID - EmplID
	COUNTRY_NM_FORMAT - Format Using
	NAME - Name
	NAME_INITIALS - Name Initials
	NAME_PREFIX - Name Prefix
	NAME_SUFFIX - Name Suffix
	NAME_ROYAL_PREFIX - Name Royal Prefix
	NAME_ROYAL_SUFFIX - Name Royal Suffix
	NAME_TITLE - Title
	LAST_NAME_SRCH - Last Name
	FIRST_NAME_SRCH - First Name
	LAST_NAME - Last Name
	FIRST_NAME - First Name
	MIDDLE_NAME - Middle Name
	SECOND_LAST_NAME - Second Last Name
	SECOND_LAST_SRCH - Second Name
	NAME_AC - Alternate Character Name
	PREF_FIRST_NAME - Preferred First Name
	PARTNER_LAST_NAME - Last Name Partner
	PARTNER_ROY_PREFIX - Prefix Partner

6. Records Page:
If, before you open the Query Page, you would like to see the fields in the selected Record, click Show Fields. To return to the Records page, click the yellow Return button which you'll see at the bottom of the screen.

Screenshot	Description
New Window | Help | http Records / **Query** / Expressions / Prompts / Fields / Criteria / Having / View SQL / Run **Query Name:** New Unsaved 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. **Chosen Records** Alias Record A PERS_DATA_SA_VW - Common Person Information Hierarchy Join − Check All Fields Uncheck All Fields **Fields** Find | View All First 1-35 of 35 Last ☐ EMPLID - EmplID ☐ COUNTRY_NM_FORMAT - Format Using ☐ NAME - Name ☐ NAME_INITIALS - Name Initials ☐ NAME_PREFIX - Name Prefix Join NAME_PREFIX_TBL - Name Prefixes ☐ NAME_SUFFIX - Name Suffix Join NAME_SUFFIX_TBL - Name SuffixTable ☐ NAME_ROYAL_PREFIX - Name Royal Prefix ☐ NAME_ROYAL_SUFFIX - Name Royal Suffix ☐ NAME_TITLE - Title ☐ LAST_NAME_SRCH - Last Name	**7. Query Page:** When you click Add Record on the **Records Page**, the **Query Page** opens. Displayed are the fields in this Record which is assigned the Alias A. Key field(s) are indicated with a key icon; these are the fields that make the rows in this record unique. The funnel icon allows you to access the **Criteria Page** for a particular field.
New Window | Help | http Records / **Query** / Expressions / Prompts / Fields / Criteria / Having / View SQL / Run **Query Name:** New Unsaved 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. **Chosen Records** Alias Record A PERS_DATA_SA_VW - Common Person Information Hierarchy Join Check All Fields Uncheck All Fields **Fields** Find | View All First 1-35 of 35 Last ☑ EMPLID - EmplID ☐ COUNTRY_NM_FORMAT - Format Using ☑ NAME - Name ☐ NAME_INITIALS - Name Initials ☐ NAME_PREFIX - Name Prefix Join NAME_PREFIX_TBL - Main Cor	**8. Query Page:** This is where you add fields to the query content by checking the boxes to the left of the field names. For this example, the fields EMPLID and NAME are checked. To join another record, click on the **Records** tab.

JOINING ANOTHER RECORD

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

Query Name: New Unsaved Query   **Description:**

Find an Existing Record

Search By: Record Name ▼   begins with   ADDRESSES

[Search] Advanced Search

Search Results

Record			
	Customize	Find	View All	🔳	First ◀ 1-2 of 2 ▶ Last
Recname		**Join Record**	**Show Fields**
ADDRESSES - Address Type		Join Record	Show Fields
ADDRESSES_SA - Address Type		Join Record	Show Fields

🖫 Save   Save As   New Query   Preferences   Properties   New Union   🔍 Return to Search

9. Records Page: When returned to this page, follow the steps needed to display the new desired record. There are two choices. Select Join Record for the correct record which will open the **Select Join Type** page.

Select join type and then record to join with ADDRESSES - Address Type.

Join Type

⦿ Join to filter and get additional fields (Standard Join)
◯ Join to get additional fields only (Left outer join)

Join Record		
	Customize	Find	🔳	First ◀ 1 of 1 ▶ Last
A = PERS_DATA_SA_VW - Common Person Information		

[Cancel]

10. Select Join Type: This page displays with options for joining the second Record with the first. Generally, you would choose the first option and click on the Join Record link.

Auto Join Criteria

Query has detected the join conditions shown below.
Use the checkboxes to unselect the criteria that you do not want to add to the query and click add criteria when done. The criteria added can always be modified later using the criteria tab.

☑ A.EMPLID - EmplID = B.EMPLID - EmplID

[Add Criteria]   [Cancel]

11. Auto Join Criteria: This page allows you to make an initial join based on one or more fields in both records. Click Add Criteria to accept this choice.

The page at http://pstux2.wesleyan.edu says:

⚠ An effective date criteria has been automatically added for this effective dated record. (139,60)

[OK]

12. Effective Date Criteria Message: If the record being added has an Effective Date field, it is automatically added to Criteria, and you will see this notification. Click OK.

Tabs: Record / **Query** / Expressions / Prompts / Fields / Criteria / Having / View SQL / Run **Query Name:** New Unsaved 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. **Chosen Records** Alias Record A PERS_DATA_SA_VW - Common Person Information Hierarchy Join B ADDRESSES - Address Type Hierarchy Join [Check All Fields] [Uncheck All Fields] **Fields** Find | View All First 1-28 of 28 Last ☐ EMPLID - EmplID ☐ ADDRESS_TYPE - Address Type ☐ EFFDT - Effective Date ☐ EFF_STATUS - Status as of Effective Date ☐ COUNTRY - Country Join COUNTRY_TBL - Countries ☐ ADDRESS1 - Address Line 1 ☐ ADDRESS2 - Address Line 2 ☐ ADDRESS3 - Address Line 3 ☐ ADDRESS4 - Address Line 4 CITY - City	**13. Query Page:** You are returned to the Query Page where the newly joined Record's fields are displayed beneath the first Record.
B ADDRESSES - Address Type Hierarchy Join [Check All Fields] [Uncheck All Fields] **Fields** Find | View All First 1-28 of 28 Last ☐ EMPLID - EmplID ☑ ADDRESS_TYPE - Address Type ☐ EFFDT - Effective Date ☐ EFF_STATUS - Status as of Effective Date ☐ COUNTRY - Country Join COUNTRY_TBL - Countries ☐ ADDRESS1 - Address Line 1 ☐ ADDRESS2 - Address Line 2 ☐ ADDRESS3 - Address Line 3 ☐ ADDRESS4 - Address Line 4 ☐ CITY - City ☐ NUM1 - Number 1 ☐ NUM2 - Number 2 ☐ HOUSE_TYPE - House Type ☐ ADDR_FIELD1 - Address Field 1 ☐ ADDR_FIELD2 - Address Field 2 ☐ ADDR_FIELD3 - Address Field 3 ☐ COUNTY - County ☑ STATE - State Join STATE_TBL - State Codes/Names w/in Country ☐ POSTAL - Postal Code	**14. Query Page:** The new record is assigned the Alias B. The ADDRESS_TYPE and STATE fields are checked off to be used in the Query. Next you will open the **Fields Page** to view how the fields are selected for output; view the properties of each field; and change order-by numbers and a heading.

REORDER/SORT AND CRITERIA

Tabs: Records / Query / Expressions / Prompts / **Fields** / Criteria / Having / View SQL / Run **Query Name:** New Unsaved Query **Description:** View field properties, or use field as criteria in query statement. [Reorder / Sort] **Fields** Customize | Find | View All | First 1-4 of 4 Last 	Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
---	---	---	---	---	---	---	---	---	---
1	A.EMPLID - EmplID	Char11				ID	🔍	Edit	–
2	A.NAME - Name	Char50				Name	🔍	Edit	–
3	B.ADDRESS_TYPE - Address Type	Char4				Addr Type	🔍	Edit	–
4	B.STATE - State	Char6				State	🔍	Edit	– | Save Save As New Query Preferences Properties New Union [Return to Search]	**16. Fields Page:** Click on the Fields tab. The four fields from the two Records are displayed in the order they were selected, and this is the order in which the Columns will appear unless the field order is changed. Click on the yellow Reorder/Sort button.

Edit Field Ordering

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 Ordering   Customize | Find | View All | ▦   First ◀ 1-4 of 4 ▶ Last

New Column	Column	Record.Fieldname	Order By	Descending	New Order By
	1	A.EMPLID - EmplID		☐	
	2	A.NAME - Name		☐	
	3	B.ADDRESS_TYPE - Address Type		☐	
1	4	B.STATE - State		☐	

[OK]   [Cancel]

Records \ Query \ Expressions \ Prompts \ (Fields) \ Criteria \ Having \ View SQL \ Run

Query Name: New Unsaved Query   Description:

View field properties, or use field as criteria in query statement.   [Reorder / Sort]

Fields   Customize | Find | View All | ▦   First ◀ 1-4 of 4 ▶ Last

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	B.STATE - State	Char6				State	🔍	Edit	−
2	A.EMPLID - EmplID	Char11				ID	🔍	Edit	−
3	A.NAME - Name	Char50				Name	🔍	Edit	−
4	B.ADDRESS_TYPE - Address Type	Char4				Addr Type	🔍	Edit	−

[Save]   Save As   New Query   Preferences   Properties   New Union   [Return to Search]

Records \ Query \ Expressions \ Prompts \ Fields \ (Criteria) \ Having \ View SQL \ Run

Query Name: New Unsaved Query   Description:

[Add Criteria]   [Group Criteria]   [Reorder Criteria]

Criteria   Customize | Find | ▦   First ◀ 1-2 of 2 ▶ Last

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.EMPLID - EmplID	equal to	B.EMPLID - EmplID	Edit	−
AND	B.EFFDT - Effective Date	Eff Date <=	Current Date	Edit	−

[Save]   Save As   New Query   Preferences   Properties   New Union   [Return to Search]

Edit Criteria Properties

Choose Expression 1 Type | Expression 1
- ⦿ Field
- ○ Expression

Choose Record and Field
Record Alias.Fieldname:
🔍

*Condition Type: equal to ▾

Choose Expression 2 Type | Expression 2
- ○ Field
- ○ Expression
- ⦿ Constant
- ○ Prompt
- ○ Subquery

Define Constant
Constant: [_____] 🔍

[OK]   [Cancel]

20. Edit Criteria Properties: You define each criterion on this page. Under Expression 1, click the lookup icon.

Select a field

Select a record to show fields for   Customize | Find | ▦   First ◀ 1-2 of 2 ▶ Last

Alias	Record	Record Description	Show Fields
A	PERS_DATA_SA_VW	Common Person Information	Show Fields
B	ADDRESSES	Address Type	Show Fields

Select a field   Customize | Find | View All | ▦   First ◀ 1-35 of 35 ▶ Last

A.EMPLID - EmplID
A.COUNTRY_NM_FORMAT - Format Using
A.NAME - Name
A.NAME_INITIALS - Name Initials
A.NAME_PREFIX - Name Prefix
A.NAME_SUFFIX - Name Suffix
A.NAME_ROYAL_PREFIX - Name Royal Prefix
A.NAME_ROYAL_SUFFIX - Name Royal Suffix
A.NAME_TITLE - Title
A.LAST_NAME_SRCH - Last Name
A.FIRST_NAME_SRCH - First Name
A.LAST_NAME - Last Name
A.FIRST_NAME - First Name
A.MIDDLE_NAME - Middle Name
A.SECOND_LAST_NAME - Second Last Name
A.SECOND_LAST_SRCH - Second Name
A.NAME_AC - Alternate Character Name

21. Select a Field: This page lists all Records in the query and all fields within each Record. Click on the Show Fields button next to B ADDRESSES; scroll down until you see the field B.STATE – State. Click on the link. You are returned to the **Edit Criteria Properties** page.

Edit Criteria Properties

Choose Expression 1 Type
- ⦿ Field
- ◯ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:

🔍 B.STATE - State

*Condition Type: equal to ▾

Choose Expression 2 Type
- ◯ Field
- ◯ Expression
- ⦿ Constant
- ◯ Prompt
- ◯ Subquery

Expression 2

Define Constant

Constant: [   ] 🔍

[OK]   [Cancel]

22. Edit Criteria Properties: B.STATE is displayed as Expression 1. Leave Condition Type as equal to. Leave Expression 2 as a Constant.

You can add the Constant in one of two ways: (1) You can click the lookup icon next to Constant which opens the following page. Enter USA and FL in the boxes.

Country: [ ] 🔍
State: [   ] 🔍
[OK] [Cancel]

You are returned to **Edit Criteria** Properties. Click OK and you go back to the **Criteria Page** where the FL criterion appears.

Edit Criteria Properties

Choose Expression 1 Type
- ⦿ Field
- ◯ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:

🔍 B.STATE - State

*Condition Type: equal to ▾

Choose Expression 2 Type
- ◯ Field
- ◯ Expression
- ⦿ Constant
- ◯ Prompt
- ◯ Subquery

Expression 2

Define Constant

Constant: [FL   ] 🔍

[OK]   [Cancel]

23. Edit Criteria Properties: The second way to add the Constant is to simply type it in the text box. Click OK and you go back to the **Criteria Page** where the FL criterion appears.

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

Query Name: New Unsaved Query   Description:

[Add Criteria]   [Group Criteria]   [Reorder Criteria]

Criteria   Customize | Find | ▦   First ◀ 1-3 of 3 ▶ Last

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
▼	A.EMPLID - EmplID	equal to	B.EMPLID - EmplID	Edit	▬
AND ▼	B.EFFDT - Effective Date	Eff Date <=	Current Date	Edit	▬
AND ▼	B.STATE - State	equal to	FL	Edit	▬

[💾 Save]   Save As   New Query   Preferences   Properties   New Union   [🔍 Return to Search]

24. Criteria Page: With the addition of FL, there are now three criteria on this page.

ADDRESS_TYPE will now be selected through a different method for adding Criteria: Start by clicking on the **Fields** tab.

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

Query Name: New Unsaved Query   Description:

View field properties, or use field as criteria in query statement.   [Reorder / Sort]

Fields   Customize | Find | View All | ▦   First ◀ 1-4 of 4 ▶ Last

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	B.STATE - State	Char6				State	🔻	Edit	▬
2	A.EMPLID - EmplID	Char11				ID	🔻	Edit	▬
3	A.NAME - Name	Char50				Name	🔻	Edit	▬
4	B.ADDRESS_TYPE - Address Type	Char4				Addr Type	🔻	Edit	▬

[💾 Save]   Save As   New Query   Preferences   Properties   New Union   [🔍 Return to Search]

25. Fields Page: Select the criteria funnel icon for ADDRESS_TYPE from record B. *Tip: You can select the funnel on other pages as well, but it is most effective from **Fields**.*

Edit Criteria Properties

Choose Expression 1 Type
- ◉ Field
- ○ Expression

Expression 1
Choose Record and Field
Record Alias.Fieldname:
🔍   B.ADDRESS_TYPE - Address Type

*Condition Type: equal to   ▼

Choose Expression 2 Type
- ○ Field
- ○ Expression
- ◉ Constant
- ○ Prompt
- ○ Subquery

Expression 2
Define Constant
Constant: HOME   🔍

[OK]   [Cancel]

26. Edit Criteria Properties: ADDRESS_TYPE is automatically selected as Expression 1. Leave the Condition Type as equal to. Click on the lookup icon next to the Constant box under Expression 2/ Define Constant. Type HOME. Click OK.

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

View All | Rerun Query | Download to Excel   First ◄ 1-100 of

	State	ID	Name	Addr Type
1	FL			HOME
2	FL			HOME
3	FL			HOME
4	FL			HOME
5	FL			HOME
6	FL			HOME
7	FL			HOME
8	FL			HOME
9	FL			HOME
10	FL			HOME
11	FL			HOME
12	FL			HOME
13	FL			HOME
14	FL			HOME
15	FL			HOME
16	FL			HOME

27. Run Page: Click on the Run tab. The result will be all individuals in the database who have the State of Florida as their Home address type.

To save the query, click on any other page tab (not **Run**) in order to see the Save As Link.

☐   REG_REGION - Regulatory Region   🦋
☐   LASTUPDDTTM - Last Update Date/Time   🦋
☐   LASTUPDOPRID - by   🦋

[Expand All Records]   [Collapse All Records]

🖫 Save   Save As   New Query   Preferences   Properties   New Union   🔍 Return to Search

28. Save As Link: At the bottom of the page, click on the Save As link.

Enter a name to save this query as:

*Query:	WES_TRAINING_STATE_XXX
Description:	Person Home State Sample
Folder:	TRAINING
*Query Type:	User ▾
*Owner:	Public ▾
Query Definition:	

[OK]   [Cancel]

29. Save the query using the [Wesleyan naming conventions](#) and complete the other fields as appropriate.