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

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).

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.
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.

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.
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.

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.

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.

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.
13. Query Page:
You are returned to the Query Page where the newly joined Record’s fields are displayed beneath the first Record.

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.

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.
17. **Edit Field Ordering**: Make STATE display as the first Column by typing a “1” under New Column next to STATE. Click OK. [Note: you can change the sort order by making similar changes under New Order By.]

18. **Fields Page**: You are returned to the Fields Page where the STATE field is now the first Column that will be displayed in the output.

19. **Criteria Page**: Click on the Criteria tab. Two criteria already exist: (1) the join between the EMPLIDs in Records A and B; AND (2) the Effective Date that was automatically suggested. **One method to add Criteria**: Click on the Add Criteria button.
20. **Edit Criteria Properties:**
You define each criterion on this page. Under Expression 1, click the lookup icon.

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

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.
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.

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*.

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.
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**.

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

29. **Save** the query using the **Wesleyan naming conventions** and complete the other fields as appropriate.