

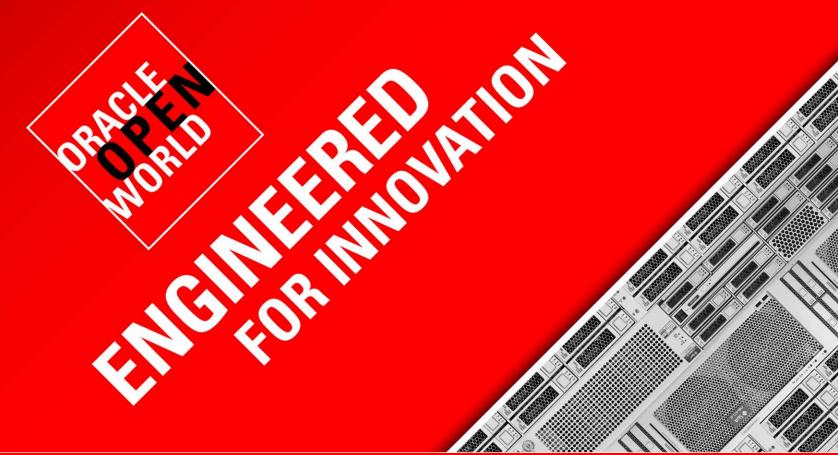
# **ENGINEERED**FOR INNOVATION



#### **ORACLE**

#### **Mastering PeopleSoft Query**

**Robert Taylor** 





#### Latin America 2011

December 6-8, 2011

**Tokyo 2012** 

April 4–6, 2012

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## **Agenda**

- New features
- Drilling examples
- Query and WorkCenters
- Connected Query

## **Query Strategy**

#### **Traditional / Printed**

- Bl Publisher
- Connected Query
- Excel
- Email Attachments

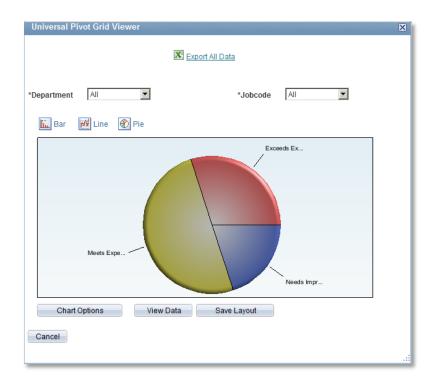
#### **Online**

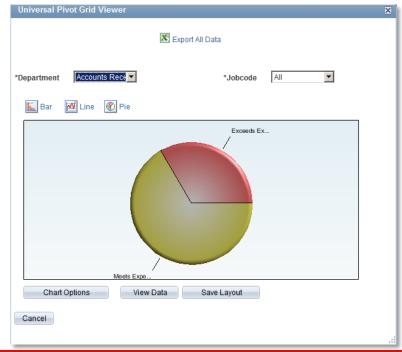
- Pagelets / homepage
- Feeds
- Drilling URL
- Query Web Services
- Related Content
- Pivot Grids

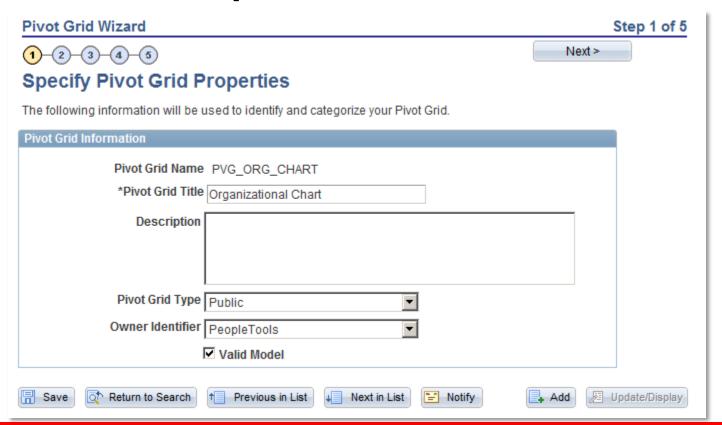
#### **New Features**

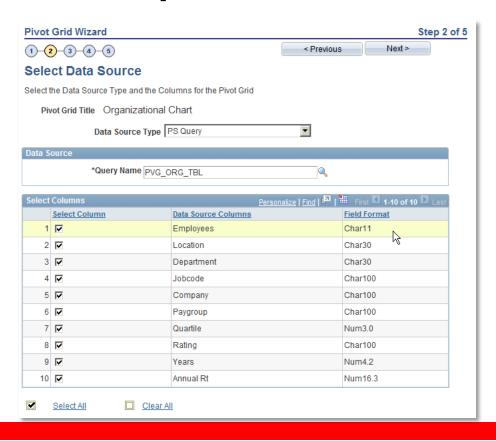
- Pivot Grids (they use queries)
- Drill to Excel

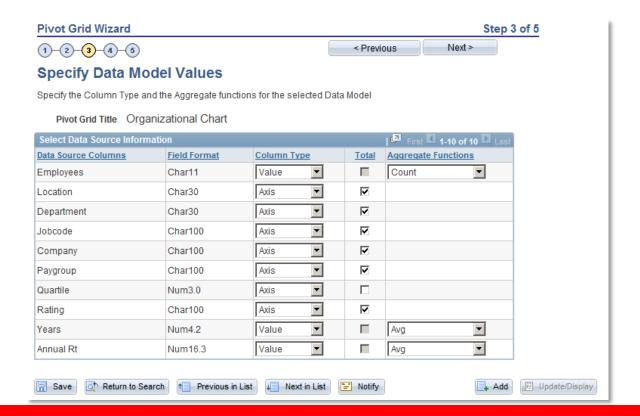
#### **Pivot Grids**

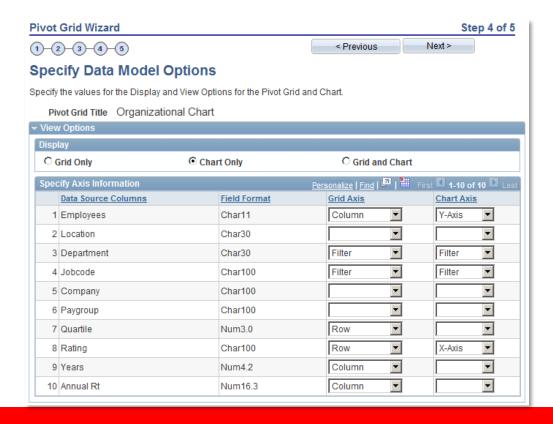


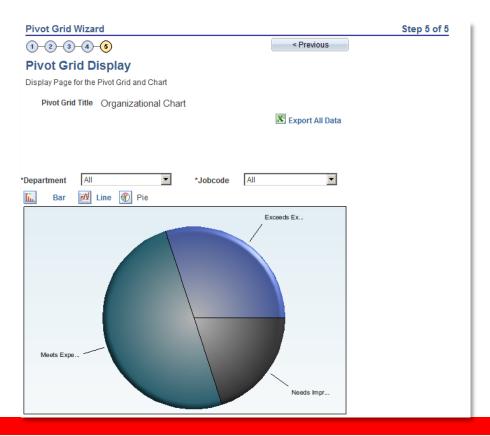












#### **DRILLING URLS**

## Drill



Plan Type Find   View All First 1 of 3 D					Las				
	Plan T	ype 40	401(k)						+ -
Coverage							Find   View All First	1 of 1	Last
*(	Coverage Begin D	ate 01/01/2000	Ф		*Deduction Beg	gin Date 01	/01/2000 🛱 🌣		+ -
Coverage	Election								
© Elect		C Waive	C Terminate	Ф.	*Elect	ion Date 06	/23/2000		
	Benefit Progr	am KU1	GBI US FT						
	Benefit P	lan KU401M	401(k) Emplo	yer Pct Match					
	Option Co	ode 1							
Before Ta	x Investment			Aft	er Tax Investmen	t			
	Flat	Amount	<b>F</b>		I	Flat Amount	Ţ		
	Percent of E	arnings 5.000			Percent	of Earnings	2.000		
	Annual Excess								
	Alliludi Excess	Credits							
Assign A	All Beneficiaries				Payro	II Status A	ctive		
Dependen	nt/Beneficiaries					<u>Personal</u>	lize   Find   🔼   🛗	1 of 1	
*ID	Name	Relationshi Employee	p to	Beneficiary Percentage		Excess	Contingent		
+									
	Total Primary I	Percent		Total Conting	gent Percent		Update Totals		
Investmer	nts						Personalize   E	1 H 1-	4 of 4
*Investme	nt Option	Description					*Investmen	t Percent	
1	Q	Money Market						25.00	
2	Q	Asset Allocation Fun	d					25.00	
3	Q	Bond Fund						25.00	
4	Q	Corporate Stock Fun	d					25.00	

## **Drill to Query**

Query Name RT SAVINGS PLAN DRILL

View field properties, or use field as criteria in query statement.

Fiel	ds	
Col	Record.Fieldname	<u>Format</u>
1	A.EMPLID - Empl ID	Char11
2	A.EMPL_RCD - Empl Record	Num3.0
3	A.PLAN_TYPE - Plan Type	Char2
4	A.EFFDT - Effective Date	Date
5	A.BENEFIT_PLAN - Benefit Plan	
6	A.PCT_GROSS - Percent of Gross	Num4.3
7	A.PLAN_TYPE	Char3

#### **Tips**

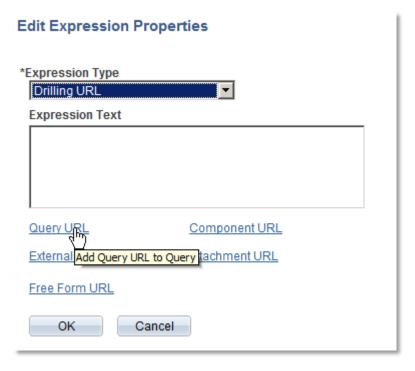
- Child Query needs to have keys as prompts
- Do not use XLATs in parent for key mapping

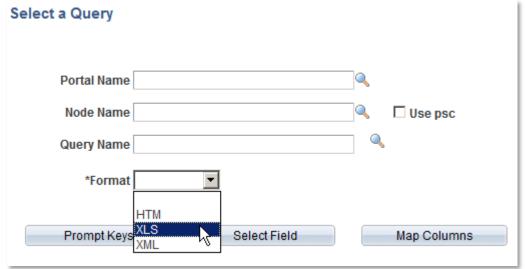
#### Query Name RT\_SAVINGS\_INVEST\_DRILL

View field properties, or use field as criteria in query statement.

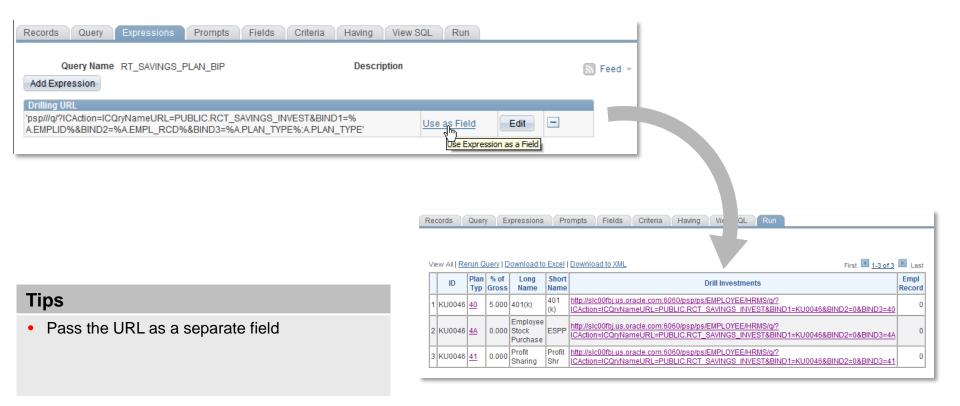
Fie	lds	
Col	Record.Fieldname	<u>Format</u>
1	A.EMPLID - Empl ID	Char11
2	A.EMPL_RCD - Empl Record	Num3.0
3	A.PLAN_TYPE - Plan Type	Char2
4	A.BENEFIT_NBR - (Not Implemented!)	Num3.0
	A.EFFDT - Effective Date	Date
6	A.INVESTMENT_OPT - Investment Option	Char6
7	A.INVESTMENT_PCT - Investment Percent	Num4.2

### Drill to Query – Drill to Excel, HTML or XML





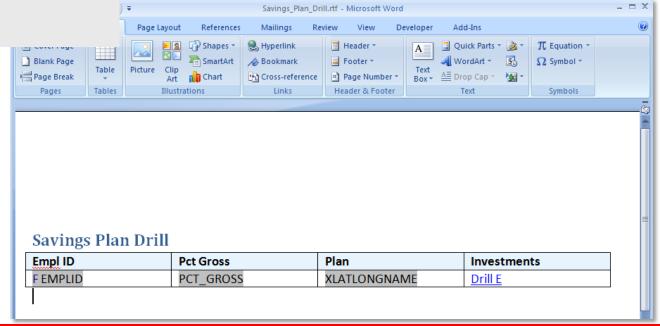
## **Drilling in BI Publisher**



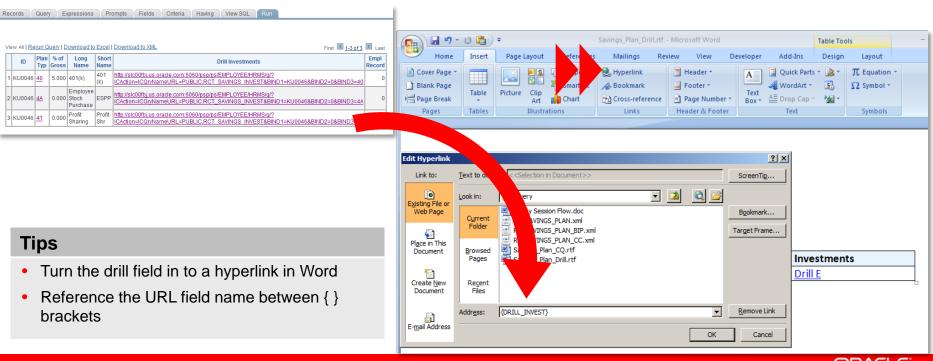
## **Drilling in BI Publisher**

#### **Tips**

Manually create drilling field text (i.e. type "Drill")



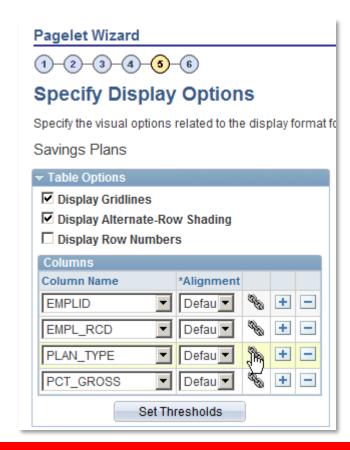
## **Drilling in BI Publisher**



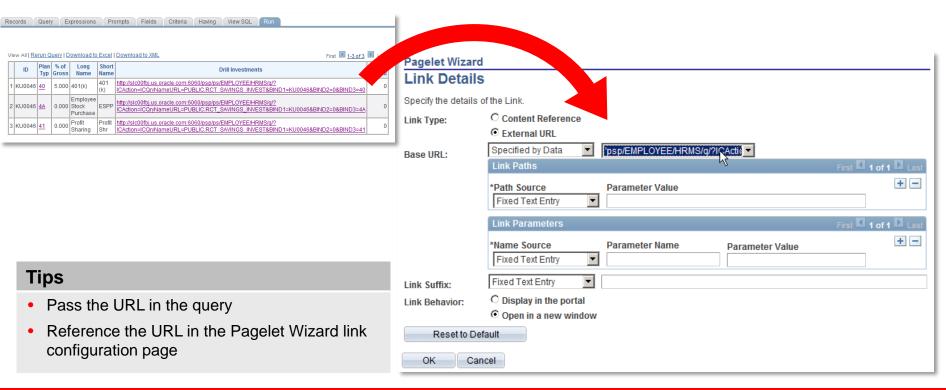
#### **Drilling in Pagelets**

#### **Tips**

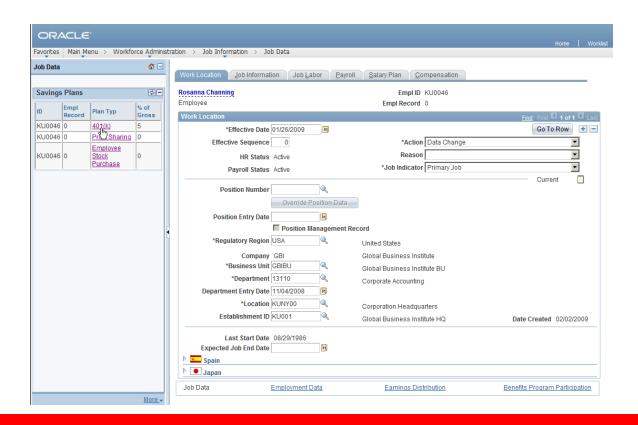
- Drilling URLs need to be recreated in Pagelet Wizard
- Click the link icon to create the drill



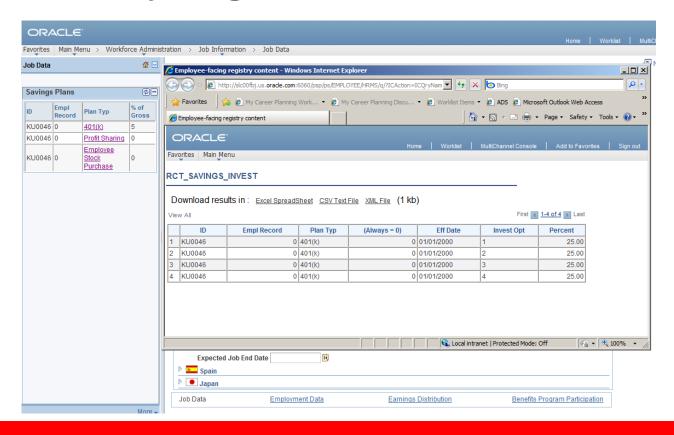
## **Drilling in Pagelets**



#### **Query Pagelets in WorkCenters**



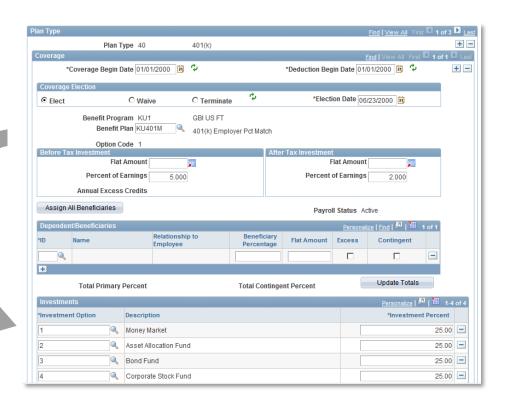
## **Query Pagelets in WorkCenters**



 Drill to new window

#### **CONNECTED QUERY**

#### **Connected Query**



- 401k
  - Investment 1
  - Investment 2
  - Investment 3
- Profit Sharing
  - Investment 1
  - Investment 2
  - Investment 3

## **Connected Query – Hierarchical Data**

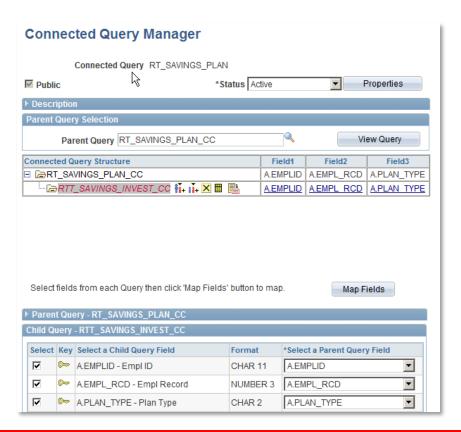
- 401k
  - Investment 1
  - Investment 2
  - Investment 3
- Profit Sharing
  - Investment 1
  - Investment 2
  - Investment 3

#### Savings Plan Report

Empl ID	% Gross	Plan	Investments			
KU004	5.000	401(k)	Benefit #	Date	Investment	Percent
6			0	2000- 01-01	1	25.00
			0	2000- 01-01	2	25.00
			0	2000- 01-01	3	25.00
			0	2000-	4	25.00
KU004	0.000	Employee	Benefit #	Date	Investment	Percent
6		Stock Purchase				
KU004	0.000	Profit Sharing	Benefit #	Date	Investment	Percent
6			0	2000- 01-01	1	25.00
			0	2000- 01-01	2	25.00
			0	2000- 01-01	3	25.00
			0	2000- 01-01	4	25.00

#### **Connected Query**

- Multiple queries run as one
- Hierarchical XML result
- For use with BI Publisher



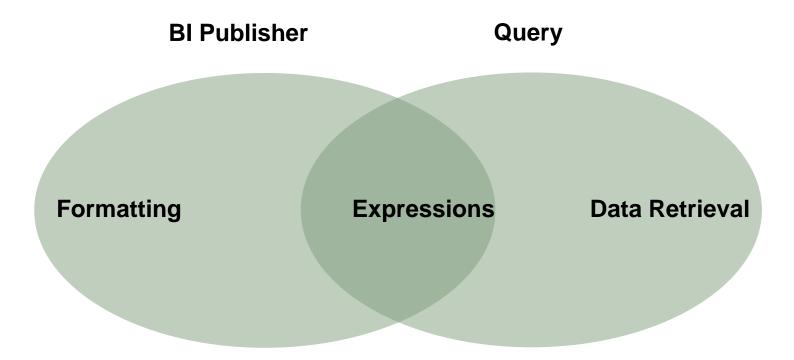
#### **Connected Query**

Makes Unions Easier – Example of a Union in Query

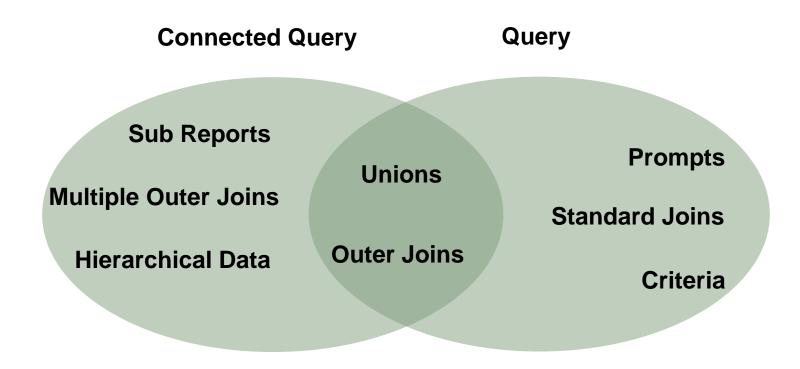
	Field 1	Field 2	Field 3	Field 4	Field 5	Field 6
Query 1	Data	Data	x	x	x	x
Query 2	x	x	Data	Data	x	x
Query 3	x	x	x	x	Data	Data

- Manage separate queries instead of one large definition
- Eliminate field placeholders

# **Query and BI Publisher**



#### **Query and Connected Query**



#### Learn More

#### PeopleSoft Information Development Resources

Hosted & Mobile PeopleBooks – PeopleTools PeopleBooks are available in three formats: Hosted PeopleBooks, PDF's, and Amazon's Kindle format. All can be accessed here: http://www.oracle.com/technetwork/documentation/psftent-





090284.html

Doc Home Pages – Constantly updated direct links to PeopleBooks, PeopleBook Updates, Release Notes, Installation and Upgrade Guides, and other useful product documentation from My Oracle Support. PeopleTools 8.52 Doc Home Page: <a href="https://support.oracle.com/CSP/main/article?cmd=show&type=NOT&doctype=REFERENCE&id=1356456.1">https://support.oracle.com/CSP/main/article?cmd=show&type=NOT&doctype=REFERENCE&id=1356456.1</a>

Information Portal – Locate the documentation, training, and other info needed to help with your implementation process. Customers searching for this information should make this their first online destination. <a href="http://www.oracle.com/us/products/applications/054275.html">http://www.oracle.com/us/products/applications/054275.html</a>



#### Learn More

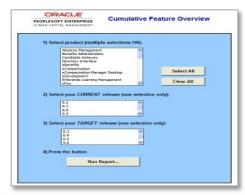
#### PeopleSoft Information Development Resources

Cumulative Feature Overview (CFO) – Providing concise descriptions of new and enhanced solutions and functionality that have become available starting with the 8.4 release through our latest 8.52 release.

https://support.oracle.com/CSP/main/article?cmd=show &type=NOT&doctype=SYSTEMDOC&id=793143.1

Upgrade Resource Report Tools – Helps you find all the documentation, scripts, and files you need for your upgrade project.

https://support.oracle.com/CSP/main/article?cmd=show&type=N OT&doctype=SYSTEMDOC&id=1117047.1





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# Monday

Time	Title	Number	Location
11:00	Improve ROI and Lower Costs by Mastering PeopleSoft Upgrade Tools and Resources	14509	Moscone West - 3020
	Mastering PeopleSoft Query	12440	Moscone West - 2024
	PeopleSoft Answers: How to Prevent Hackers from Exploiting Your System	14841	Moscone West - 2022
2:00	Managing Your PeopleSoft Applications with Oracle Enterprise Manager	12420	InterContinental – Union Square
	Performance Tuning for the PeopleSoft Administrator	14023	Moscone West - 2022
	PeopleTools Developer Series: Building and Consuming Web Services	13985	Moscone West - 2024
3:30	PeopleSoft on Oracle Exalogic: A Perfect Fit	14008	Moscone West - 2022
5:00	PeopleTools Product Roadmap	14504	Moscone West – 3002/3004

# Tuesday

Time	Title	Number	Location
10:15	PeopleSoft Enterprise: Oracle Database Technical Update	13580	Moscone South - 310
11:45	PeopleSoft Success: Best Practices for Using PeopleSoft Test Framework	14028	Moscone West - 2022
1:15	PeopleSoft Integration Broker in PeopleSoft PeopleTools Release 8.52: Highlights	13987	Moscone West - 2022
	PeopleSoft Answers: How to Create a Great PeopleSoft UI	14020	Moscone West - 2024
3:30	PeopleSoft PeopleTools Tips and Techniques	14003	Moscone West - 2022
	Oracle Fusion Middleware for Oracle Applications: Get Answers from Development	12388	Moscone West - 2016
5:00	Platform Update for PeopleSoft	14007	Moscone West - 2024
	Upgrading to PeopleSoft Feature Pack Releases	14031	Moscone West - 2022

# Wednesday

Time	Title	Number	Location
10:15	Application Integration for PeopleSoft Enterprise	12750	Moscone West - 3020
11:45	PeopleSoft PeopleTools Release 8.52: How PeopleSoft's New Search Features Will Change The World	14022	Moscone West - 2022
1:15	PeopleSoft Success: Using Virtualization to Manage TCO	14006	Moscone West - 2024
5:00	Meet the Experts: PeopleSoft PeopleTools	S317455	Moscone West – Applications/CRM Lounge
	PeopleSoft Success: PeopleSoft Portal Creates Great Self-Service Solutions	14010	Moscone West - 2022
	PeopleTools Developer Series: Secure Coding Practices	14001	Moscone West - 2024

# Thursday

Time	Title	Number	Location
9:00	PeopleSoft Success: One Strategy for Staying Current and On Track for the Future	14030	Moscone West - 2024
	PeopleSoft Answers: How to Provide Seamless User Access, On- Premises or as SaaS	14842	Moscone West - 2022
	Extending PeopleSoft Applications with Oracle ADF and Oracle SOA Suite	12381	InterContinental – Union Square
10:30	PeopleSoft Answers: How to Enable PeopleSoft for Mobile Users	14000	Moscone West - 2022
	PeopleTools Developer Series: Mastering PeopleSoft's Reporting Tools	14002	Moscone West - 2024
12:00	PeopleTools Developer Series: Performance Tips for the PeopleSoft Developer	14026	Moscone West - 2022
1:30	Hands On Lab - Install Release 9.1 of PeopleSoft Human Capital Management in Minutes with Oracle VM	21401	Marriott Marquis - Nob Hill CD
	PeopleSoft PeopleTools Product Team Panel Discussion	14005	Moscone West - 2022
3:00	Hands On Lab - Install Release 9.1 of PeopleSoft Human Capital Management in Minutes with Oracle VM	21401	Marriott Marquis - Nob Hill CD
	PeopleSoft Answers: Oracle Active Data Guard and Oracle GoldenGate for Read-Only	14009	Moscone West - 2022

# Q&A



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