

Wesleyan University Student/Faculty Information System

PeopleSoft Query Reference

PeopleSoft 9.0; Query 8.52

Running a Query to Excel and Summarizing Data with a Pivot Table

1. If you are using an existing query, you can run it in Query Viewer or in Query Manager.
2. If you are creating a new query in Query Manager, once completed and saved, run the query.
3. In this example, the query used is the sample query **WES_SFIS_TRAINING_QUERY_3A**.
 - a. It is based on the WES_STUDENT View
 - b. To include all Majors that begin with ENGL, the criterion for the major is: WES_MAJORS like ENGL%
 - c. The prompted criteria are Term (STRM) and Career (ACAD_CAREER). When prompted, enter the current term and select Undergraduate
 - d. The fields returned are:
 - i. ID (EMPLID)
 - ii. Name (NAME)
 - iii. Wesleyan Majors (WES_MAJORS)
 - iv. Wesleyan Class (WES_CLASS)
 - e. The beginning of the results looks like this (with the IDs and Names obscured):

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Term = 1171,Career=UGRD

View All | Rerun Query | **Download to Excel** | Download to XML

First 1-100

	ID	Name	Wes Majors	Wesle
1			ENGL	2017
2			ENGL,FILM	2017
3			ENGL	2019
4			ENGL	2017
5			ENGL	2017
6			ENGL	2017
7			ENGL,MATH,PHIL	2018
8			ENGL,FILM	2017
9			ENGL,FILM	2018
10			ENGL	2017
11			ENGL	2017
12			ENGL,PSYC	2018
13			ENGL	2018
14			ENGL	2017
15			ENGL	2018

4. Run the query to Excel
 - a. If you are using Query Viewer, you can see on the SFIS Blog page [Query Viewer – View Results & Run to Excel](#).
 - b. If you are in Query Manager, proceed as follows:
 - i. Click on Download to Excel
 - ii. Following the dialogs in your browser, download, save, and open the Excel file.

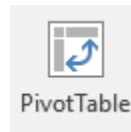
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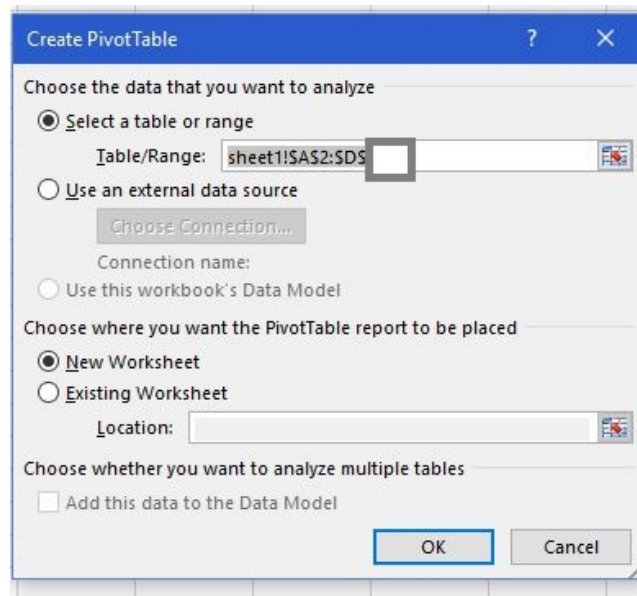
PeopleSoft 9.0; Query 8.52

ID	Name	Wes Majors	Wesleyan Class
		ENGL	2017
		ENGL,FILM	2017
		ENGL	2019
		ENGL	2017
		ENGL	2017
		ENGL,MATH,PHIL	2018
		ENGL,FILM	2017
		ENGL,FILM	2018
		ENGL	2017
		ENGL	2017
		ENGL,PSYC	2018
		ENGL	2018
		ENGL	2017
		ENGL	2018
		FNGL	2018

5. **Important: Delete Row 1.**
6. Begin the pivot table as follows:
 - a. Click on any cell within the range
 - b. Click on Insert
 - c. Click on the Pivot Table icon



7. The Create Pivot Table dialog will open. Depending upon your version of Excel, it may be somewhat different. Click OK to place the pivot table in a new worksheet.

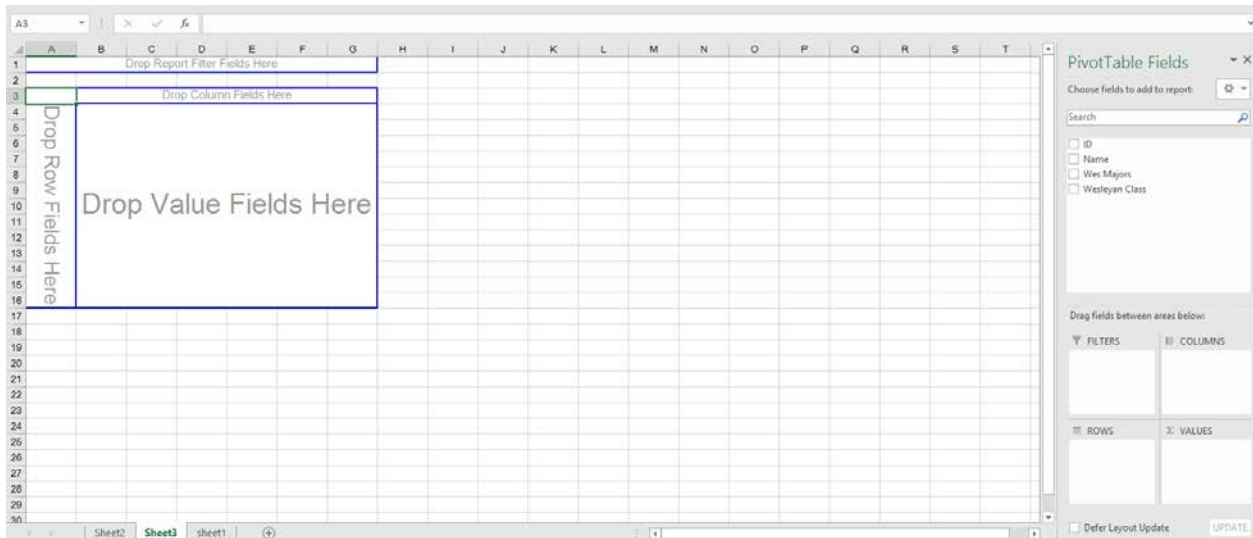


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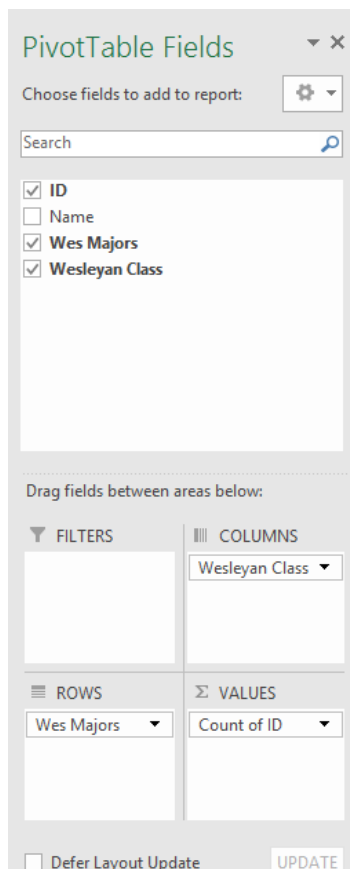
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6. The new worksheet will resemble this:



8. On the right, drag and drop ID, Wes Majors, and Wesleyan Class year into the sections at the bottom so that they appear as follows:



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- The left of the screen will now show a count of different English Majors combinations by class year (the actual values are obscured).

	A	B	C	D	E	F
1	Drop Report Filter Fields Here					
2						
3	Count of ID	Wesleyan Class				
4	Wes Majors	2017	2018	2019	Grand Total	
5	ENGL					
6	ENGL,ENVS					
7	ENGL,FGSS					
8	ENGL,FILM					
9	ENGL,FRST					
10	ENGL,GOVT					
11	ENGL,HISP					
12	ENGL,ITST					
13	ENGL,MATH					
14	ENGL,MATH,PHIL					
15	ENGL,MB&B					
16	ENGL,MDST					
17	ENGL,MUSC					
18	ENGL,PHYS					
19	ENGL,PSYC					
20	ENGL,RELI					
21	ENGL,RMST					
22	ENGL,SOC					
23	ENGL,THEA					
24	ENGL,UNIV					
25	Grand Total					
26						

