## REVISION CONTROL

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<td>04/25/06</td>
<td>M Diño</td>
<td>Release of New Document</td>
<td>All</td>
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<td>04/27/06</td>
<td>M Diño</td>
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<td>All</td>
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### Review/Approval History

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**Introduction**

The CMS Department office has created this Query Tips Business Process Guide to help end-users who create queries within the PeopleSoft HCM 8.9 HR system. The purpose of this guide is to offer tips on how to improve existing queries created by end-users. This guide is not a training guide on how to create queries. If additional information on how to create queries is needed, the Creating Queries training class should be taken.

**Process Prerequisites/Assumptions**

<table>
<thead>
<tr>
<th>Prerequisite/Assumption</th>
<th>Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>End-user has already taken the Creating Query Training Course</td>
<td>The CMS Department offers a Creating Query Training Course, which provides all the basic information on how to create a query within the PeopleSoft HCM 8.9 HR system. This course must be taken before the end-user is granted the security access needed to create queries.</td>
</tr>
</tbody>
</table>
HCM 8.9 Query Tips

Log into PeopleSoft and Navigate to Query Manager:

Using your campus issues User ID/Password, log into the PeopleSoft application. It is suggested that when creating new queries with multiple criteria or joins, the user should first try to create the query in a non-production instance e.g. H8SBTST so that performance in the production environment is not affected.

From your desktop:
1) Open your Internet Explorer browser
2) Navigate to the database login screen
3) Enter your User ID
4) Enter your Password
5) Click on the Sign In pushbutton

Navigate to the PeopleSoft Query Manager:
6) Reporting Tools
7) Query
8) Query Manager
From the Query Manager window:

9) Enter the query search criteria to identify the query e.g. Query Name begins with SB_Q.

10) Click on the Search pushbutton.

11) Run the desired query to excel by clicking the Edit hyperlink that corresponds to the query you want to run.

The Query opens:

12) Make all the necessary changes to the query and save if necessary.
Query Edit Field Properties

Within PeopleSoft query there are several formatting changes that the end user can make to change the way that the query output displays. This section covers the most common changes that can be made through the Edit Field Properties.

Change Column Field Order

Use the following steps to change the column order of the query output. In this example, the column order will change to:

<table>
<thead>
<tr>
<th>Old Column Order</th>
<th>New Column Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Name Prefix</td>
</tr>
<tr>
<td>First Name</td>
<td>First Name</td>
</tr>
<tr>
<td>Middle Name</td>
<td>Middle Name</td>
</tr>
<tr>
<td>Name Prefix</td>
<td>Last Name</td>
</tr>
<tr>
<td>Name Suffix</td>
<td>Name Suffix</td>
</tr>
</tbody>
</table>

From Query Manager:
1) Navigate to the Fields page
2) Identify the field you would like the query output to be ordered by
3) Click on the corresponding Column Order pushbutton

Edit Field Column page opens:
4) Change the Column Order so that the numbers correspond with the order that the query output should display.
Note: In our example we want the name fields to appear in the following order: Prefix, FirstName, MiddleName, LastName, Suffix.

5) Click on the **OK** pushbutton when finished.

You are returned to the Fields page:

6) Verify that the fields appear in the order you want displayed in the output. The correct number in the **Col** column should appear.

7) Click on the Run Folder tab to run the query.

8) After reviewing the change, click **Save** when finished.

Example of the Query output run in PeopleSoft:

Note: In version 8.0 end-users were required to Save the query before running it in PeopleSoft. In version 8.9, queries can be created and run without saving.

**Query Column Order Change**
Change Sort Field Order

Use the following steps to change the sort order of the query output. In this example, the sort order will change to:

<table>
<thead>
<tr>
<th>Old Sort Order</th>
<th>New Sort Order</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Last Name</td>
</tr>
<tr>
<td></td>
<td>First Name</td>
</tr>
</tbody>
</table>

From Query Manager:
1) Navigate to the Fields page
2) Identify the field you would like the query output to be sorted by
3) Click on the corresponding Sort Order pushbutton

Edit Field Sort page opens:
4) Change the Sort Order so that the numbers correspond with the sort order that the query output should display.
5) Select the Direction of the fields that you want to sort.
   Note: In our example we want the fields to appear in the following sort order: Last Name, then First Name.
6) Click on the OK pushbutton when finished
You are returned to the Fields page:

7) Verify that the fields appear in the sort order you want displayed in the output. The correct number in the Ord column should appear.

8) Click on the Run Folder tab to run the query.

9) After reviewing the change, click **Save** when finished.

Example of the Query output run in PeopleSoft:

Note: In version 8.0 end-users were required to Save the query before running it in PeopleSoft. In version 8.9, queries can be created and run without saving.
Change Heading Labels

Use the following steps to change the heading labels of the query output. In this example, the label heading of the NAME_TYPE field will be changed:

<table>
<thead>
<tr>
<th>Old Heading Label</th>
<th>New Heading Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of Name</td>
<td>Name Type</td>
</tr>
</tbody>
</table>

From Query Manager:
1) Navigate to the Fields page
2) Identify the field you would like to change the heading label for by reviewing the Heading Text column information.
3) Click on the corresponding Edit pushbutton.

Edit Field Properties page opens:
4) Review the Heading information. In this example the heading is generated from the RFT Short and appears in the Heading Text field.
5) Select the Text radio button to designate your own heading text for the field
6) Type in the heading you want displayed in the Heading Text field
7) Click on the OK pushbutton when finished

Note: In our example we want the field heading to be First.
You are returned to the Fields page:

8) Verify that the field heading has been changed. The correct heading in the Heading Text column should appear.

9) Click on the Run Folder tab to run the query.

10) After reviewing the change, click Save when finished.

Example of the Query output run in PeopleSoft:

Note: In version 8.0 end-users were required to Save the query before running it in PeopleSoft. In version 8.9, queries can be created and run without saving.
Change Translate Value Display

Use the following steps to change the translate value displayed on the query output. In this example, the translate value of Pay Status will be changed from ‘N’ which displays only the translate value code to “L” which displays the translate value long description. Output after editing:

<table>
<thead>
<tr>
<th>Old Translate Value Display “N”</th>
<th>New Translate Value Display “L”</th>
</tr>
</thead>
<tbody>
<tr>
<td>A  Active</td>
<td></td>
</tr>
<tr>
<td>D  Deceased</td>
<td></td>
</tr>
<tr>
<td>L  Leave of Absence</td>
<td></td>
</tr>
<tr>
<td>P  Leave With Pay</td>
<td></td>
</tr>
<tr>
<td>Q  Retired With Pay</td>
<td></td>
</tr>
<tr>
<td>R  Retired</td>
<td></td>
</tr>
<tr>
<td>S  Suspended</td>
<td></td>
</tr>
<tr>
<td>T  Terminated</td>
<td></td>
</tr>
<tr>
<td>U  Terminated With Pay</td>
<td></td>
</tr>
<tr>
<td>V  Terminated Pension Pay Out</td>
<td></td>
</tr>
<tr>
<td>W  Short Work Break</td>
<td></td>
</tr>
<tr>
<td>X  Retired-Pension Administration</td>
<td></td>
</tr>
</tbody>
</table>

From Query Manager:
1) Navigate to the Fields page
2) Identify the translate field you would like to change the value display for by reviewing the XLAT column information.
3) Click on the corresponding Edit pushbutton.

Edit Field Properties page opens:
4) Review the translate display information. In this example the translate value display is None.
5) Change the **Translate Value** for the field that you would like to change the value display for.
   - 'N'-None (the value will display)
   - 'S'-Short Descr
   - 'L'-Long Descr

   Note: In our example we want the Pay Status translate value Long Description to display instead of the translate value code.

6) Click on the **OK** pushbutton when finished

You are returned to the Fields page:

7) Verify that the translate value field display is correct in the **XLAT** column.

   Note: Since in our example we want our Pay Status XLAT value display changed, the XLAT should change from 'N' to 'L'.

8) Click on the Run Folder tab to run the query.

9) After reviewing the change, click **Save** when finished.

Example of the Query output run in PeopleSoft:

Note: In version 8.0 end-users were required to Save the query before running it in PeopleSoft. In version 8.9, queries can be created and run without saving.
# Query Field Selection Criteria

Within PeopleSoft query you are able to enter criteria that returns specific data based on the criteria selected. Using criteria helps improve query performance and should be used to further refine data for analysis. This section covers several examples of criteria that can be used within query.

## Exact Match Criteria

Use the following steps to enter criteria when you know the exact criteria of the value(s) you want returned. You will not be able to use a wildcard (%) if you enter the exact match criteria. In this example, the exact match criteria is Department ID = CF0700.

### From Query Manager:

1. Navigate to the Fields page
2. Identify the field that you want to create criteria for.
3. Click on the corresponding Criteria icon (]){( pushbutton.

### Special Note:

If you are querying on data and you want the criteria to return rows that are not blank e.g. where CSU Retirement Code is blank, where Expected End Date is blank, where SSI Counter is blank, etc., there is specific criteria that must be entered depending on what type of field the criteria is being built on. Use the following as a guide:

- **If the field is a date field then use null** – A.EFFDT is null or is not null
- **If the field is a number field, use 0 (zero)** – A.EMPL_RCD equal to 0
- **If the field is a character field, use ‘ ’ (blank)** – A.EMPLID equal to (blank) (type in a blank space in the Constant field to get the blank space)

If you are unsure what type of field you are building the criteria off of, then in query navigate back to the Fields folder tab and review the Format column.
Edit Criteria Properties page opens:

4) Review the Record and Field Expression. Verify that the correct field displays.
Note: Because you used the criteria icon from the Fields page, the record and field information are automatically filled in.

5) Enter the Condition Type.
6) Enter the Expression 2.
7) Click on the OK pushbutton when finished.

You are returned to the Fields page:

8) Navigate to the Criteria page
9) Verify that the field criteria appears correctly e.g. A.DEPTID equal to CF0700.
Note: If the criteria is not correct, click on the Edit pushbutton to update the criteria.

10) Click on the Run Folder tab to run the query.
11) After reviewing the change, click Save when finished.

Example of the Query output run in PeopleSoft:

Note: In version 8.0 end-users were required to Save the query before running it in PeopleSoft. In version 8.9, queries can be created and run without saving.
'Like' Criteria

Use the following steps to enter criteria where you do not know exactly the value(s) you want returned. Using Like criteria will allow you to use a wildcard (%) in your criteria. Examples of how the wildcard can be used:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Examples of Values Returned</th>
</tr>
</thead>
<tbody>
<tr>
<td>DeptID = CF%</td>
<td>CF0000-CF9999</td>
</tr>
<tr>
<td>DeptID = %S1%</td>
<td>BS1000-BS1999</td>
</tr>
<tr>
<td></td>
<td>CS1000-CS1999</td>
</tr>
<tr>
<td></td>
<td>DS1000-DS1999</td>
</tr>
<tr>
<td>DeptID = C%0100</td>
<td>C0100, CF0100, CS0100</td>
</tr>
<tr>
<td>DeptID = %9999</td>
<td>B9999, BF9999, BS9999</td>
</tr>
<tr>
<td></td>
<td>C9999, CF9999, CS9999</td>
</tr>
<tr>
<td></td>
<td>D9999, DF9999, DS9999</td>
</tr>
</tbody>
</table>

In this example, the like criteria is Department ID = B%0300.

From Query Manager:
1) Navigate to the Fields page
2) Identify the field that you want to create criteria for.
3) Click on the corresponding Criteria icon pushbutton.

Edit Criteria Properties page opens:
4) Review the Record and Field Expression. Verify that the correct field displays.
Note: Because you used the criteria icon from the Fields page, the record and field information are automatically filled in.
5) Enter the Condition Type.
6) Enter the Expression 2.
7) Click on the OK pushbutton when finished.
You are returned to the Fields page:
8) Navigate to the Criteria page

9) Verify that the field criteria appears correctly e.g. A.DEPTID like B%0300.

Note: If the criteria is not correct, click on the Edit pushbutton to update the criteria.

10) Click on the Run Folder tab to run the query.

11) After reviewing the change, click Save when finished.

Example of the Query output run in PeopleSoft:

Note: In version 8.0 end-users were required to Save the query before running it in PeopleSoft. In version 8.9, queries can be created and run without saving.
Date Field Criteria

Use the following steps to enter criteria for use with dates where you want the value to fall after, before or within a certain date range. Examples of how the Date Field can be used:

<table>
<thead>
<tr>
<th>Description</th>
<th>Field</th>
<th>Condition Type</th>
<th>Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dependent older than 23</td>
<td>Birthdate</td>
<td>less than</td>
<td>01/01/1983</td>
</tr>
<tr>
<td>Action Effective date after the beginning of FY 2005</td>
<td>Effective Date</td>
<td>greater than or equal to</td>
<td>07/01/2005</td>
</tr>
<tr>
<td>Job data entered after HCM 8.9 go-live date</td>
<td>Action Date</td>
<td>greater than</td>
<td>04/03/2006</td>
</tr>
<tr>
<td>Employees hired within FY 2004</td>
<td>Effective Date</td>
<td>between</td>
<td>07/01/2004 - 06/30/2006</td>
</tr>
</tbody>
</table>

In this example, the date criteria is Effective Date between 07/01/2005 and 06/30/2006.

From Query Manager:
1) Navigate to the Fields page
2) Identify the field that you want to create criteria for.
3) Click on the corresponding Criteria icon (pushbutton).

Edit Criteria Properties page opens:
4) Review the Record and Field Expression. Verify that the correct field displays.
   Note: Because you used the criteria icon from the Fields page, the record and field information are automatically filled in.
5) Enter the Condition Type.
6) Enter the Expression 2 – Date1 and Date2.
7) Click on the OK pushbutton when finished.
You are returned to the Fields page:

8) Navigate to the Criteria page

9) Verify that the field criteria appears correctly e.g. A.EFFDT between 2005-07-01 AND 2006-06-30.

Note: If the criteria is not correct, click on the Edit pushbutton to update the criteria.

10) Click on the Run Folder tab to run the query.

11) After reviewing the change, click Save when finished.

Example of the Query output run in PeopleSoft:

Note: In version 8.0 end-users were required to Save the query before running it in PeopleSoft. In version 8.9, queries can be created and run without saving.
Running Queries to Microsoft Excel

Follow these steps to setup your workstation so that when you run queries in the PeopleSoft 8.x application e.g. FIS 8.4, HCM 8.9, etc. your query will open in Microsoft Excel instead of inside your web browser.

Illustration of Excel Opening in the Web Browser:

If you click on the Download to Excel hyperlink from PS Query, Excel opens in a separate Web Browser instead of opening up in Excel.

From PS Query:
1) Create a new query or run an existing query in PeopleSoft.
2) Download the results of your query to Excel.

The query returns results in Excel but opens in the Internet Explorer web browser window.
Setup Needed for Query to open in Excel Application instead of the Web Browser:

Make the following changes so that if you click on the Download to Excel hyperlink from PS Query, Excel opens in a New Window.

From your workstation Desktop:
1) Select **Start**
2) Right Click
3) Select **Explore**

The Windows Explorer window will open.
4) Select **Tools**
5) Select **Folder Options…**
The Folder Options window will open.
6) Select the **File Types** folder tab
7) Highlight the XLS (Microsoft Excel Worksheet) file type
8) Click on the **Advanced** pushbutton

![Folder Options window](image)

The Edit File Type window will open.
9) Deselect the **Browse in same window** checkbox
10) Click the **OK** pushbutton

Note: It is optional whether or not you want to **Confirm open after download** or **Always show [file] extension**.

![Edit File Type window](image)
You are returned back to the Folder Options window.

11) Click the **Close** pushbutton

---

From PS Query:

12) Create a new query or run an existing query in PeopleSoft.

13) Download the results of your query to Excel.
The query returns results in Excel and opens in a new window using the Excel application.

Since your query was downloaded into Excel and opened in the Excel Application, you should still be able to toggle back to your PeopleSoft query in the web browser.
Running Queries to Excel from PeopleSoft:

There are a couple of ways to run query results to Excel from PeopleSoft. The following illustrates the two most common ways to run queries to Excel.

From the Query Manager window:
1) Enter the query search criteria to identify the query e.g. Query Name begins with SB_POS.
2) Click on the Search pushbutton.
3) Run the desired query to excel by clicking the Excel hyperlink that corresponds to the query you want to run.

The query results will be returned in Excel in a separate window.
If you would like to make changes to your query first before running the query results to Excel, from the Query Manager window:

4) Run the desired query to excel by clicking the Edit hyperlink that corresponds to the query you want to run.

The Query opens:

5) Make all the necessary changes to the query and save if necessary.

6) When you have completed making the query changes, click on the Run folder tab.
To run the query to Excel:
7) Click on the **Download to Excel** hyperlink.

The query results will be returned in Excel in a separate window.
# Commonly Used Query Records

The following is a list of commonly used HR query records:

<table>
<thead>
<tr>
<th>Record Name</th>
<th>Component Reference</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMPLOYEES</td>
<td>Personal Information component Job Data component</td>
<td>Record that stores personal data, job data and CSU job data for current employees only. Only Active employees will be returned.</td>
</tr>
<tr>
<td>PERSON_NAME</td>
<td>Personal Information component Biographical Details page Last Name First Name Name Type = PRI</td>
<td>Record that stores person name information. Because PeopleSoft stores several Name Types, add the criteria of NAME_TYPE = PRI. The Primary name type is used by HR.</td>
</tr>
<tr>
<td>PERS_NID_VW</td>
<td>Personal Information component Biographical Details page National ID fields</td>
<td>Record that stores the person’s National ID (Social Security Number).</td>
</tr>
<tr>
<td>PERSONAL_DATA</td>
<td>Personal Information component Biographical Details page Contact Information page Regional page</td>
<td>Record that stores personal data information: Name, Address, Birthdate, SSN, etc. Because of performance issue, avoid joining this Record to other tables if possible. Use PERSON_NAME for LastName, FirstName, PERS_NID_VW for SSN, etc.</td>
</tr>
<tr>
<td>JOB</td>
<td>Job Data Information component Work Location page Job Information page Job Labor page Payroll page Salary Plan page</td>
<td>Record that stores job data information: Position Number, Job Code, Expected End Date, Expected Return Date, Last Date Physically Worked, FTE, Salary Grade, Benefit Program, etc.</td>
</tr>
<tr>
<td>COMPENSATION</td>
<td>Job Data component Compensation page – all fields</td>
<td>Record that stores employee job related Compensation information: Pay Components - Rate Code, Comp Rate, etc.</td>
</tr>
<tr>
<td>CSU_JOB</td>
<td>Job Data component CSU Job page – all fields CSU Faculty page – all fields</td>
<td>Record that stores CSU job data information: Probation Code, Anniversary Code, Retirement Code, DIP Eligibility, SSI Counter, etc.</td>
</tr>
<tr>
<td>PER_ORG_ASSN</td>
<td>Job Data component Employment Information page Original Start Date Benefit Program Participation page Benefit Record Number</td>
<td>Record that stores Person Organization Assignment data information: POI Type, Original Hire Date, Benefit Record Number, etc.</td>
</tr>
<tr>
<td>BEN_PROG_PARTIC</td>
<td>Job Data component Benefit Program Participation page [Benefit] Effective Date Benefit Program</td>
<td>Record that stores Employee Benefit Program Participation data information: [Benefit Program] Effective Date &amp; Benefit Program.</td>
</tr>
</tbody>
</table>