

HCM Query Basic - Fluid

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HCM Query Basic - Fluid

Welcome to **PeopleSoft Query Basics - Fluid for Human Capital Management (HCM)**. This module contains information and tools needed to perform basic query functions in PeopleSoft 9.2 PT. 8.61.05.

At the end of this module, you will be able to...

- 1. Search for existing queries.
- 2. Run existing queries
- **3.** Run existing queries to HTML and Excel
- 4. Export existing queries to Excel
- 5. Understand how to Save queries to Excel.

NOTE: This guide serves as an introduction to the Query Module of PeopleSoft 9.2 PT. 8.61.05. This module will not cover topics associated with creating or modifying queries.

Run an Existing Query

Procedure

In this topic you will learn how to **Run an Existing Query**.

Step	Action
1.	What is a Query?
	A Query is a request for data or information from a database. It allows the end-user to interact with the system to retrieve, manipulate, and/or analyze data. The system stores data in tables when it is entered. <i>Tables</i> are comprised of <i>Records (rows)</i> and <i>Fields (columns)</i> .
	Queries contained in the Reports database that are <i>predefined</i> are <i>public queries</i> . A plethora of public queries are available for HCM end-user benefit. Access to these queries is determined by the end-user's security access (Operator ID).

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Step	Action
2.	Click the NavBar button.

Step	Action
3.	Click the Menu button.
	Menu
4.	Click the Reporting Tools button.
	Reporting Tools
5.	Click the Query button.
	C Query >
6.	Click the Query Manager button.

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Query Manager				
New Window Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Query Create New Query	Help	Pers	onalize	Page
*Search By Query Name begins with Search Advanced Search				

Step	Action
7.	When Query Manager is opened, it defaults the user onto the Find an Existing Query option. The user may view existing queries utilizing one of the following methods:
	1. Enter appropriate search criteria (query name) into the *Search By field. The user <u>must</u> enter all or part of the query name. Use the % (percent sign) to act as a wildcard when searching.
	2. Click the Search button to view a list of all existing queries. The user's private queries will display at the top of the list. Private queries will be covered in the <i>Query Intermediate</i> class.
	3. Users may also click the Advanced Search . The user can change the <i>Query Name</i> parameter from ' <i>begins with</i> ' to ' <i>contains</i> ' - or to another available parameter - to search for an existing query.
8.	Click the Search button.
	NOTE: It may take the system a couple of minutes to process the request, if the user retrieves an excessive number of results from the search. The Processing indicator will display in the top right corner of the page.
	Search

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Step	Action
9.	A message appears under the Search button stating there are 'too many items met your search criteria.' Thus, only the first 300 items can be displayed.

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Query Manager											
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Step	Action
10.	The total number of queries retrieved displays on the far-right side of the page as well. In this example, it shows that the <i>first 30 query results</i> are displayed in the window. Users can select View 100 to <i>view one hundred queries</i> at a time.
11.	The arrows allow you to navigate from page to page. The <i>right arrow</i> allows you to view the <i>next</i> 30 queries. The <i>right arrow with a straight line</i> allows you to view the <i>last 30 queries</i> . The <i>left arrow</i> allows you the view the <i>previous 30 queries</i> , and the <i>left arrow with the straight line</i> displays the <i>first 30 queries</i> .

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Too man	iy items met your search	h criteria. Only the first 300) items displayed.				
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Query							
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Select	Query Name		Descr	Owner	Folder	Edit	Rui HTI
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Action
Users can <i>reduce</i> the number of queries retrieved by <i>entering all or part</i> of the <i>query name</i> in the <i>Search By</i> field. In this example, you will search for the query <i>LSU_BENPROG_DT_GT_RTRMNT_DT</i> .
Enter the desired information into the Libe_D field. Enter Libe_D .
Click the Search button. Search

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Query Manager							
nformation you have and click Find an Existing	Search. Leave fields blar Query Create New Qu	nk for a list of all values. ery					
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LSU_BENEFTIT_PLANS		Lists all benefit plans	Public		Edit	HTML	Excel
LSU_BENPROG_DT_GT_R	TRMNT_DT	Ben Prog Dt > Rtrmnt Plan Dt	Public		Edit	HTML	Excel
LSU_BEN_MATCHING_SHA	ARE	Business Unit PPE Promt	Public		Edit	HTML	Excel
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Step	Action
14.	There are two formats in which users can view query results:
	1. HTML - Will open a new window within the PeopleSoft application to display query results. The HTML method does not allow the user to edit or manipulate the results. HTML will retrieve all results regardless of the number of results returned. Users are able to download results into Excel from HTML.
	2. Excel - The query results can also be run directly to an Excel spreadsheet within the PeopleSoft application. Data results can be edited or manipulated in Excel. For example, data may be sorted, filtered, formatted, and saved as an Excel file.

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Query Manager											
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LSU_BENEFTIT_PLAN	۹S	Lists all benefit plans	Public		Edit	HTML	Excel				
LSU_BENPROG_DT_	GT_RTRMNT_DT	Ben Prog Dt > Rtrmnt Plan Dt	Public		Edit	HTML	Excel				
LSU_BEN_MATCHING	SHARE	Business Unit PPE Promt	Public		Edit	HTML	Excel				

Step	Action
15.	Click the LSU_BENPROG_DT_GT_RTRMNT_DT HTML link.
	HTML

SU_BENPROG								
Business Unit:	٩							
Row ID	Name	Ben Progrm	Eff Date	Plan Typ	Ded Begin	Covrg Elec	Plan	Unit

Step	Action
16.	Enter the desired information into the *Business Unit field. Enter "LSUNO ". <i>NOTE: Other Business Units will use the following designations:</i> <i>Shreveport - LSUSH</i>
	Lallie Kemp - LAKMC HCSD HQTRS - HCSDA

LSU_BENPROG_DT_GT	LSU_BENPROG_DT_GT_RTRMNT_DT - Ben Prog Dt > Rtrmnt Plan Dt						
*Business Unit: LSUNO Q View Results							
Row ID Name	Ben Progrm	Eff Date	Plan Typ	Ded Begin	Covrg Elec	Plan Unit	
row ID Name	Len Frogrm	LTI Jate	Pian typ	Uea Begin	Lovig Liec	rian Unit	

Step	Action
17.	Click the View Results button.
	View Results

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Row	ID	Name Ben P	rogrm Eff Date	Plan Typ	Ded Begin	Covrg Elec	Plan	Unit
1	John Doe	NEL	07/01/2011	70	07/04/2005	т	DCRES	LSUNO
2	John Doe	NEL	10/01/2005	70	07/04/2005	т	DCRES	LSUNO
3	John Doe	NEL	07/01/2013	70	07/05/2004	т	DCRES	LSUNO
4	John Doe	NEL	07/01/2013	70	08/01/2001	т	DCRES	LSUNO
5	John Doe	NEL	04/01/2005	70	07/05/2004	Т	DCRES	LSUNO
6	John Doe	NEL	11/01/2004	70	07/05/2004	Т	DCRES	LSUNO
7	John Doe	NEL	06/01/2022	70	07/03/2006	Т	DCRES	LSUNO
8	John Doe	NEL	02/28/2011	70	07/05/2004	т	DCRES	LSUNO
9	John Doe	NEL	01/01/2003	70	12/31/2002	т	ORPVAL	LSUNO
10	John Doe	NEL	12/01/2007	70	07/04/2005	т	DCRES	LSUNO
11	John Doe	NEL	07/01/2013	70	07/07/2003	т	DCRES	LSUNO
12	John Doe	NEL	10/01/2001	70	07/09/2001	т	DCRES	LSUNO
13	John Doe	NEL	09/24/2012	70	07/07/2003	т	DCRES	LSUNO
14	John Doe	NEL	06/01/2007	70	07/07/2003	т	DCRES	LSUNO
15	John Doe	NEL	07/01/2011	70	07/04/2005	т	DCRES	LSUNO
16	John Doe	NEL	07/01/2007	70	07/03/2006	т	DCRES	LSUNO
17	John Doe	NEL	05/07/2001	70	05/01/2001	т	TRSL	LSUNO
18	John Doe	NEL	11/01/2015	70	07/05/2004	т	DCRES	LSUNO
19	John Doe	NEL	07/01/2024	70	07/07/2003	т	DCRES	LSUNO
20	John Doe	NEL	12/01/2007	70	07/07/2003	Т	DCRES	LSUNO
21	John Doe	FTP	07/01/2024	70	07/03/2006	Т	DCRES	LSUNO
22	John Doe	FTP	09/13/2010	70	04/02/2004	E	TRSL	LSUNO
23	John Doe	NEL	09/01/2005	70	07/07/2003	т	DCRES	LSUNO
24	John Doe	NEL	03/01/2022	70	07/07/2003	Т	DCRES	LSUNO
25	John Doe	NEL	10/15/2010	70	07/01/2001	Т	DCRES	LSUNO
26	John Doe	NEL	07/01/2007	70	07/04/2005	Т	DCRES	LSUNO
27	John Doe	FTP	04/01/2021	70	05/01/2019	E	ORPTIA	LSUNO
28	John Doe	NEL	07/29/2013	70	07/07/2003	Т	DCRES	LSUNO
29	John Doe	NEL	07/29/2013	70	07/01/2001	Т	DCRES	LSUNO
30	John Doe	NEL	09/01/2007	70	07/02/2007	Т	DCRES	LSUNO

Step	Action
18.	Click the Excel Spreadsheet link.
	NOTE: A new window opens to display your Excel Spreadsheet. Excel SpreadSheet

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Row	ID	Name	Ben Progrm	Eff Date	Plan Typ	Ded Begi	Full downl	oad history			
1		John Doe	NEL	07/01/2011	70	07/04/2005					
2		John Doe	NEL	10/01/2005	70	07/04/2005	Т	DCRES	LSUNO		
3		John Doe	NEL	07/01/2013	70	07/05/2004	T	DCRES	LSUNO		
4		John Doe	NEL	07/01/2013	70	08/01/2001	T	DCRES	LSUNO		
5		John Doe	NEL	04/01/2005	70	07/05/2004	Т	DCRES	LSUNO		
6		John Doe	NEL	11/01/2004	70	07/05/2004	Т	DCRES	LSUNO		
7		John Doe	NEL	06/01/2022	70	07/03/2006	Т	DCRES	LSUNO		
8		John Doe	NEL	02/28/2011	70	07/05/2004	Т	DCRES	LSUNO		
9		John Doe	NEL	01/01/2003	70	12/31/2002	Т	ORPVAL	LSUNO		
10		John Doe	NEL	12/01/2007	70	07/04/2005	T	DCRES	LSUNO		
11		John Doe	NEL	07/01/2013	70	07/07/2003	Т	DCRES	LSUNO		
12		John Doe	NEL	10/01/2001	70	07/09/2001	Т	DCRES	LSUNO		
13		John Doe	NEL	09/24/2012	70	07/07/2003	Т	DCRES	LSUNO		
14		John Doe	NEL	06/01/2007	70	07/07/2003	Т	DCRES	LSUNO		
15		John Doe	NEL	07/01/2011	70	07/04/2005	Т	DCRES	LSUNO		
16		John Doe	NEL	07/01/2007	70	07/03/2006	Т	DCRES	LSUNO		
17		John Doe	NEL	05/07/2001	70	05/01/2001	т	TRSL	LSUNO		
18		John Doe	NEL	11/01/2015	70	07/05/2004	Т	DCRES	LSUNO		
19		John Doe	NEL	07/01/2024	70	07/07/2003	Т	DCRES	LSUNO		
20		John Doe	NEL	12/01/2007	70	07/07/2003	Т	DCRES	LSUNO		
21		John Doe	FTP	07/01/2024	70	07/03/2006	Т	DCRES	LSUNO		
22		John Doe	FTP	09/13/2010	70	04/02/2004	F	TRSL	LSUNO		

Step	Action
19.	Click the LSU_BENPROG_DT_GT_RTRM Open button.
20.	Your results display.
	Click the Close button.
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w	ID	Name	Ben Progrm	Eff Date	Plan Typ	Ded Begin	Covrg Elec	Plan	Unit		
		John Doe	NEL	07/01/2011	70	07/04/2005	T	DCRES	LSUNO		
2		John Doe	NEL	10/01/2005	70	07/04/2005	1	DCRES	LSUNO		
3		John Doe	NEL	07/01/2013	70	07/05/2004	1	DCRES	LSUNO		
4		John Doe	NEL	07/01/2013	70	08/01/2001	Т	DCRES	LSUNO		
5		John Doe	NEL	04/01/2005	70	07/05/2004	Т	DCRES	LSUNO		
5		John Doe	NEL	11/01/2004	70	07/05/2004	Т	DCRES	LSUNO		
7		John Doe	NEL	06/01/2022	70	07/03/2006	Т	DCRES	LSUNO		
3		John Doe	NEL	02/28/2011	70	07/05/2004	Т	DCRES	LSUNO		
9		John Doe	NEL	01/01/2003	70	12/31/2002	Т	ORPVAL	LSUNO		
0		John Doe	NEL	12/01/2007	70	07/04/2005	Т	DCRES	LSUNO		
1		John Doe	NEL	07/01/2013	70	07/07/2003	Т	DCRES	LSUNO		
2		John Doe	NEL	10/01/2001	70	07/09/2001	Т	DCRES	LSUNO		
3		John Doe	NEL	09/24/2012	70	07/07/2003	Т	DCRES	LSUNO		
4		John Doe	NEL	06/01/2007	70	07/07/2003	Т	DCRES	LSUNO		
5		John Doe	NEL	07/01/2011	70	07/04/2005	Т	DCRES	LSUNO		
6		John Doe	NEL	07/01/2007	70	07/03/2006	Т	DCRES	LSUNO		
7		John Doe	NEL	05/07/2001	70	05/01/2001	т	TRSL	LSUNO		
8		John Doe	NEL	11/01/2015	70	07/05/2004	т	DCRES	LSUNO		
9		John Doe	NEL	07/01/2024	70	07/07/2003	Т	DCRES	LSUNO		
0		John Doe	NEL	12/01/2007	70	07/07/2003	Т	DCRES	LSUNO		
1		John Doe	FTP	07/01/2024	70	07/03/2006	Т	DCRES	LSUNO		
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Step	Action
21.	Click the Close tab.
22.	Click the LSU_BENPROG_DT_GT_RTRMNT_DT Excel link.

ow ID Name Ber	Progrm Eff Date	Plan Typ	Ded Begin	Covrg Elec	Plan Unit

Step	Action
23.	Enter the desired information into the *Business Unit field. Enter "LSUSH ". <i>NOTE: Other Business Units will use the following designations:</i> <i>New Orleans - LSUNO</i>
	Lallie Kemp - LAKMC HCSD HQTRS - HCSDA

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Step	Action
24.	Click the View Results button.
	View Results



Step	Action
25.	Click the LSU_BENPROG_DT_GT_RTRM Open button.

PROTECTED	VIEW Be careful—files from the Internet	t can contain viruses. Unless you	need to edit, it's safer	to stay in Pro	tected View. Enab	le Editing		
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	Iohn Dec	jben Progrim	0/2/2015	70	T/7/2002	T	DCDES	
	John Doe	NEL	3/18/2013	70	7/7/2003	T	DCRES	1.9
	John Doe	NEL	5/1/2023	70	7/3/2006	Ť	DCRES	IS
	John Doe	NEL	10/1/2023	70	7/9/2001	T	DCRES	IS
	John Doe	NEL	3/2/2014	70	7/9/2001	T	DCRES	LS
	John Doe	NEL	9/24/2021	70	7/9/2001	Ť	DCRES	LS
	John Doe	NEL	2/15/2010	70	7/14/2008	Ť	DCRES	LS
	John Doe	NEL	1/1/2020	70	7/11/2011	Ť	DCRES	LSI
	John Doe	NEL	10/1/2023	70	9/1/2001	Т	ORPTIA	LS
	John Doe	FTP	10/3/2005	70	8/5/2002	E	LASERS	LS
	John Doe	FTP	10/3/2005	70	8/5/2002	E	LASERS	LS
	John Doe	FTP	10/3/2005	70	8/5/2002	E	LASERS	LS
	John Doe	FTP	10/3/2005	70	8/5/2002	E	LASERS	LS
	John Doe	NEL	7/15/2008	70	7/14/2008	Т	DCRES	LS
	John Doe	NEL	8/2/2010	70	7/9/2001	Т	DCRES	LS
	John Doe	NEL	2/5/2020	70	7/5/2004	Т	DCRES	LS
	John Doe	FTP	2/19/2024	70	3/16/2023	E	LASERS	LS
	John Doe	FTP	2/19/2024	70	3/16/2023	E	LASERS	LS
	John Doe	FTP	2/19/2024	70	3/16/2023	E	LASERS	LS
	John Doe	FTP	2/19/2024	70	3/16/2023	E	LASERS	LS
	John Doe	FTP	7/3/2012	70	7/1/2012	E	TRSL	LS
	John Doe	NEL	7/14/2009	70	7/13/2009	Т	DCRES	LS
	John Doe	NEL	1/2/2020	70	7/12/2010	T	DCRES	LSI
	John Doe	NEL	7/1/2020	70	7/11/2011	T	DCRES	LS
	John Doe	NEL	7/13/2010	/0	7/12/2010	1	DCRES	LS
	John Doe	NEL	7/14/2009	/0	7/13/2009		DCRES	LS
	John Doe	NEL	4/18/2008	10	7/2/2007	1	DCRES	LS
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Step	Action
26.	Click the Close button.
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27.	Click the Close tab.
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Step	Action
28.	Click the Home button.
29.	This completes Run an Existing Query.
	End of Procedure.