

HCM Query Intermediate - Fluid

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HCM Query Intermediate - Fluid

Welcome to **PeopleSoft Query Intermediate - Fluid for Human Capital Management** (HCM) module contains information and tools needed to create queries in PeopleSoft 9.2 PT. 8.61.05.

What is Query?

Query is an end-user reporting tool that allows for retrieval of select data from the HCM system. It is accessed through the Reports database and extracts data from PeopleSoft tables and records.

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

- **1.**Create and Format a Query.
- **2.** Add Criteria to a query.
- **3.** Add a prompt to a query.
- 4. Use Multiple tables to create a query.

Creating and Formatting a New Query

Create a New Query

Procedure

In this topic you will learn how to **Create a New 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> . The end-user <u>must</u> select the <i>Tables, Records</i> and <i>Fields</i> utilized in the query. Query results are displayed in an Excel spreadsheet format. <i>The end-user must have an idea of what the spreadsheet data will include before selecting any tables, records or fields.</i> |
| 2. | Queries will only be created in the Reports database and will be saved as <i>private queries</i> . Only you will be able to view and run a query you create, unless you specifically share it with another user. |
| | Queries contained in the Reports database that are predefined are public queries. 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). If you edit an existing public query, make sure you <i>save</i> the query under a <i>new name</i> . |

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| Step | Action |
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| 3. | Click the NavBar button. |
| 4. | Click the Menu button. |
| | Menu |
| 5. | Click the Reporting Tools menu. Reporting Tools > |
| 6. | Click the Query menu. |
| | C Query > |
| 7. | Click the Query Manager button. |

| Step | Action |
|------|---|
| 8. | Click the Create New Query link. |
| | Create New Query |
| 9. | Across the top of the page are <i>nine tabs</i> that can be used in creating or amending a query. The system defaults you onto the Records tab. In this tab you will select the <i>tables and/or records</i> you wish to use in your query. <i>Tables and records</i> are listed in <i>alphabetical</i> order. |
| 10. | The user may <i>search</i> for <i>tables and records</i> utilizing one of the following methods: |
| | 1. Enter appropriate search criteria (Table/Record name) into the *Search By field. The user <u>must</u> enter all or part of the name. Use the % (percent sign) to act as a wildcard when searching. Names can be entered in upper, lower or mixed case. |
| | 2. Click the Search button to view a list of all existing tables and records. |
| | 3. Users may also click the Advanced Search . The user can change the <i>Record Name</i> parameter from ' <i>begins with</i> ' to ' <i>contains'</i> - or to another available parameter - to search for a table or record. |
| 11. | Scenario |
| | In this exercise, you will use fields from one record - the EMPLOYEES record. The following fields will be selected from the table: |
| | 1. EMPLID 2. NAME 3. HIGH_EDUC_LVL 4. ORIG_HIRE_DT 5. DEPTID |
| 12. | Enter the desired information into the *Search By field. Enter " employees ". |
| 13. | Click the Search button. Search |
| 14. | Only one option is returned in the search results. However, if you are unsure if this is the correct record to use, simply click the Show Fields link to view the fields that comprise the record. |
| | Click the Show Fields link. Show Fields |
| 15. | There are 241 fields associated with this record. You would scroll through the list to determine if all fields were included. |
| | Press the left mouse button and drag the mouse down to the bottom of the page. |

| Step | Action |
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| 16. | All fields are found on this record, so you will select it for your query. |
| | Click the Return button. |
| | Return |
| | |
| 17. | Click the Add Record link. |
| | Add Record |
| 18. | In this example, an Effective Date criteria message displays and occurs anytime an effective dated record is selected. This allows you to modify the date criteria of the record. For this record, all data will be retrieved with effective dates prior to the current date. |
| | Click the OK button. |
| | OK |
| 19. | Selecting Fields |
| | The <i>record</i> and the <i>fields</i> in the record appear on the Query tab. It is here that you will select the fields to build your query. Simply click the <i>checkboxes</i> to the left of the field name to select it. |
| | To <i>deselect</i> a field, click the checkbox again or click the <i>Uncheck All Fields</i> button to deselect all checked fields. |
| 20. | Key Field |
| | A field with a <i>key</i> to the left of the field name is called a Key Field . The <i>key</i> indicates the field as a <i>common field</i> to multiple records. Key Fields provide a <i>link</i> when <i>joining</i> multiple tables and/or records together when building a query. |
| 21. | Add Criteria |
| | The <i>funnel with a plus sign</i> found on the far right of the page for each field is called the Add Criteria button. Adding criteria allows you to <i>reduce</i> the number of rows returned in your results and <i>retrieve</i> only the data you need at the time the query runs. |
| | See the Working with Criteria and Prompts section for additional information regarding using criteria. |

| Step | Action |
|------|---|
| 22. | Fields default in hierarchical order (i.e., the Key fields in the record appear at the top of the list). Fields may be sorted and viewed alphabetically by selecting the Sort fields alphabetically button. Select the button a second time to return to the original view. Click the Sort fields alphabetically button. |
| 23. | Click the Sort fields alphabetically button to return to the original view. |
| 24. | The following fields will be selected for your query: EMPLID, NAME, HIGH_EDUC_LVL, ORIG_HIRE_DT, and DEPTID. Click the EMPLID - Empl ID option. |
| 25. | Click the NAME - Name option. |
| 26. | If a field is not on the first page of your results, you can use the Find feature to search for the field rather than going from page to page. The Find function is <i>case sensitive</i> , unlike the Search function which is <u>not</u> . Click the Find button. |



| Step | Action |
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| 27. | Enter the desired information into the Enter search string: field. Enter "HIGH". |
| 28. | Click the OK button. |

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| | HIGHEST_EDUC_LVL - Highest Education Level | < | Ŗ | |
| | FT_STUDENT - Full-Time Student | 4 | 74 | |
| | MILITARY_STATUS - Military Status | | 74 | |
| | US_WORK_ELIGIBILTY - Eligible to Work in U.S. | | 4 | |
| | MILIT_SITUATN_FRA - Military Status | | 4 | |
| | DISABLED - Disabled | | 4 | |
| | DISABLED_VET - Disabled Veteran | | 4 | |
| | ETHNIC_GROUP - Ethnic Group | 4 | 4 | |
| | TWO_RACES_IND_USA - Two or More Races | 4 | 74 S | |
| | CITIZENSHIP_STATUS - Citizenship Status | e e e e e e e e e e e e e e e e e e e | 54 3 | |
| | ORIG_HIRE_DT - Original Start Date | | 4 | |
| | PER_ORG - Organizational Relationship | < | 54 D | |
| | BENEFIT_RCD_NBR - Benefit Record Number | < | 54 (3) | |
| | CMPN/_SENIORITY_DI - Company Seniority Date | 4 | \$ + ⊋ | |
| | SERVICE_DI - Service Date | 4 | \$ • ⋑ | |
| | HOME_HOSI_CLASS - Home/Host Classification | 4 | \$ - | |
| | LAST_INCREASE_DT - Date Last increase | 4 | ₽ | |
| | During Strength (or more) or Company | 4 | ₽ | |
| | BUSINESS_ITTLE - BUSINESS THE PROPATION DT_DESERTION | 4 | ₽ | |
| | EEEDT Effective Date | ę | 2 | |
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| | EFFSEQ - Elective Sequence | ¢ | 2 | |
| | FINE_DT - FISI Stati Date | ¢ | 2 | |
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| | REPORTS TO - Reports To Position Number | ¢ | 2 | |
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| Step | Action |
|------|--|
| 29. | Click the HIGHEST_EDUC_LVL - Highest Education Level option. |
| | |
| 30. | Click the ORIG_HIRE_DT - Original Hire Date option. |
| | |
| 31. | Click the Find button. |
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| | | HIGHEST EDUC I | | 9 | 2 | |
| | | ET STUDENT Full Time Student | | 9 | | |
| | | MILITARY STATUS - Military Status | | Ś | 2 | |
| | | US WORK ELIGIBILTY - Eligible to Work in U.S. | | Ś | | |
| | | MILIT_SITUATN_FRA - Military Status | | 9 | 2 | |
| | | DISABLED - Disabled | | 9 | 2 | |
| | Ō | DISABLED VET - Disabled Veteran | | 5 | 2 | |
| | | ETHNIC GROUP - Ethnic Group | | 9 | 2 | |
| | | TWO RACES IND USA - Two or More Races | | 9 | 2 | |
| | | CITIZENSHIP STATUS - Citizenship Status | | 9 | 2 | |
| | | ORIG_HIRE_DT - Original Start Date | | 5 | 2 | |
| | | PER_ORG - Organizational Relationship | | 5 | 4 | |
| | | BENEFIT_RCD_NBR - Benefit Record Number | | 5 | 4 | |
| | | CMPNY_SENIORITY_DT - Company Seniority Date | | 9 | 4 | |
| | | SERVICE_DT - Service Date | | 9 | 4 | |
| | | HOME_HOST_CLASS - Home/Host Classification | | 9 | • | |
| | | LAST_INCREASE_DT - Date Last Increase | | 1 | 4 | |
| | | OWN_5PERCENT_CO - Owns 5% (or More) of Company | | 7 | (| |
| | | BUSINESS_TITLE - Business Title | | 2 | ŧ | |
| | | PROBATION_DT - Probation Date | | 7 | ÷ | |
| | | EFFDT - Effective Date | | 7 | • | |
| | | EFFSEQ - Effective Sequence | | 1 | | |
| | | HIRE_DT - First Start Date | | 1 | ÷ | |
| | | EXPECTED_RETURN_DT - Expected Return Date | | | • | |
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| | | LASI_UAIE_WORKED - LASI Date Worked | | e e e | * | |
| | | KEPUKIS_IU - KEPORS ID POSITION NUMBER | MAME Current Primary N | | | |
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| 4 | 1.0 | BUSINESS UNIT - BUSINESS UNIT | | | 2 | • |

| Step | Action |
|------|--|
| 32. | Enter the desired information into the Enter search string: field. Enter "DEPTID". |
| 33. | Click the OK button. |

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| Query | Manage | r | | | |
| | Fields | | Q K < 94-143 of 241 • > > View | w 100 | 4 |
| | | DEPTID - Department JOBCODE - Job Code POSITION_NBR - Position Number EMPL_STATUS - Payroll Status ACTION - Action ACTION_DI - Action Date ACTION_ENERSON - Reason Code LOCATION - Location Code JOB_ENTRY_DT - Job Entry Date DEPT_ENTRY_DT - Job Entry Date DEPT_ENTRY_DT - Department Entry Date POSITION_ENTRY_DT - Position Entry Date SHIFT - Regular/Temporary FULL_PART_TIME - Full/Part Time FLSA_STATUS - FLSA Status OFFICER_CD - Officer Code COMPANY - Company PAYGROUP - Pay Group EMPL_TYPE - Employee Type HOLIDAY_SCHEDULE - Holiday Schedule STD_HOURS - Standard Hours STD_HRS_FREQUENCY - Standard Work Period REG_REGION - Regulatory Region PAID_HOURS - Paid Hours | Join SET_DEPT_VW - Department table view Join ACTION_TBL - ACTION Setup Table Join ACTN_REASON_TBL - Action/Reason Combinations Join SET_LOC_VW - View of location table Join COMPANY_TBL - Company Codes Join HOLIDAY_TBL - Holiday Table ID | 0 දුර පර | |
| | | PAUD_FIE - Paid FIE PAID_HRS_FREQUENCY - Paid Work Period FTE - FTE EEO_CLASS - EEO Classification | | - 0- 0- 0 | |

| Step | Action |
|------|--|
| 34. | Click the DEPTID - Department option. |
| 35. | The fields selected on the Query tab only affect which fields are shown in your spreadsheet results. Click the Fields tab. Fields |
| 36. | Verify all the fields needed for your spreadsheet are shown on the Fields tab. If all fields are <u>not</u> shown, return to the Query tab to select any missing fields. <i>Selected fields displayed in spreadsheet order on the Fields tab.</i> Users can make <i>format</i> changes to the query <i>layout</i> from the Fields page. <i>See the "Format a Query" topic for additional information.</i> The Run tab allows you to <i>preview</i> the query results and <i>verify</i> you are retrieving data for all selected fields. |
| | Run |

| Step | Action |
|------|---|
| 37. | All fields have populated with data, so you know your query is working as it should. Click the Fields tab. Fields |
| 38. | It is recommended that you <i>name</i> and <i>save</i> your query before getting too far in the process. Click the Save As link. Save As |

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| Step | Action |
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| 39. | The *Query and Description fields each have a maximum length of 30 characters. <u>No</u> special characters (e.g., \$, &, #, etc.), except for an underscore, can be used in the query name. The *Query name can be entered in upper or lower case but will be changed by the system to upper case when saved. The Description can be entered in upper or lower case and will <u>not</u> change when saved. Enter the desired information into the *Query field. Enter |
| | "EMPL_HIGH_EDU_LIST". |
| 40. | Enter the desired information into the Description field. Enter "EMPLOYEE HIGH EDUCATION LIST ". |

| Step | Action |
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| 41. | Enter the desired information into the Query Definition field. Enter "04/24/25 CLASS EXERCISE". |

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| Step | Action |
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| 42. | Click in the OK field. |
| | ОК |
| 43. | This completes <i>Create a New Query</i> . End of Procedure. |

Format a Query

Procedure

In this topic you will learn how to **Format a Query**.

| Step | Action |
|------|--|
| 1. | Selected fields will display on the Fields tab in spreadsheet result order. The <i>Heading Text</i> column shows each field's column title. |
| 2. | Notice the 'N' value in the XLAT column for HIGHEST_EDUC_LVL. XLAT is an abbreviation for Translate Value which is a specific text or label that is stored in a table. There are three values used for Translate Values: N (None) option will display the default translate code (e.g., "G" = Bachelor's Degree) in the query results. S (Short) option will display a maximum of 10 characters (e.g., Bachelor's) in the query results. L (Long) option will display a maximum of 30 characters (e.g., G-Bachelor's Level Degree) NOTE: Translate Values will appear on the page if the field does not have an associated value. Translate Values and Heading Titles may be changed by clicking on a field's Edit button. |

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| Step | Action | | | | |
|------|---|--|--|--|--|
| 3. | Click the HIGHEST_EDUC_LVL Edit button. Edit | | | | |
| 4. | In the Heading box: The RFT Short option will display the default selection (Hi Educ Lv) in the column heading. The RFT Long option will display the long description (Highest Education Level) in the column heading. The Heading Text option will display the free text (that you type) in the column heading. No Heading will been the column heading heading. | | | | |
| 5. | Click the Text option. | | | | |
| 6. | Enter the desired information into the Heading Text field. Enter " HIGH EDUCATION LVL ". | | | | |
| 7. | Click the Long option. | | | | |

| Step | Action | | | | | | |
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| 8. | Click the OK button. | | | | | | |
| | ОК | | | | | | |
| 9. | Click the Reorder/Sort button. | | | | | | |
| | Reorder / Sort | | | | | | |
| 10. | The <i>left side</i> of the panel is used to <i>reorder</i> , or <i>change</i> the order, of the columns will display in your spreadsheet results. | | | | | | |
| | The <i>right side</i> of the panel is used to <i>sort</i> your data. When running your query, <i>data will sort based on the field in the first column</i> . For this example, the data will sort by EmpIID. <i>Sort</i> allows you to <i>change how the data is ordered</i> in your spreadsheet without having to change the column order. | | | | | | |
| 11. | Reorder Columns | | | | | | |
| | You will first reorder your columns. EmplID and Name will stay in their designated positions. <i>DEPTID</i> will change to column 3 , <i>HIGHEST_EDUC_LVL</i> to column 4 , and ORIG_HIRE_DT to the 5 position. | | | | | | |
| | Enter the desired information into the DEPTID field. Enter " 3 ". | | | | | | |
| 12. | Enter the desired information into the HIGHEST_EDUC_LVL field. Enter "4". | | | | | | |
| 13. | Enter the desired information into the ORIG_HIRE_DT field. Enter "5". | | | | | | |
| 14. | Sort Data | | | | | | |
| | Currently your data is sorted by EMPLID in ascending order, because it is the first column of your spreadsheet. You can change whether your data sorts ascending or descending simply by checking the box for the desired field in the Descending column. | | | | | | |
| | Click the HIGHEST_EDUC_LVL Descending option. | | | | | | |
| 15. | You can change how your data will sort by placing a "1" in the New Order By column for the field you wish to sort by first. In this example, use the HIGHEST_EDUC_LVL field as your first sort option. | | | | | | |
| | Enter the desired information into the HIGHEST_EDUC_LVL New Order By field. Enter "1". | | | | | | |
| 16. | You can sort by more than one data type. In this example, you place a "2" in the New Order By column for ORIG_HIRE_DT . | | | | | | |
| | Enter the desired information into the ORIG_HIRE_DT New Order By field. Enter "2". | | | | | | |

| Step | Action |
|------|---|
| 17. | Click the OK button. |
| 18. | The Col order shows the changes made using the <i>Reorder</i> option. The Ord column displays the changes made using the <i>Sort</i> option. Click the Run button. |
| 19. | A total of 9,073 results are returned, and is sorted by HIGHEST_EDUC_LVL and then ORIG_HIRE_DT. Click the Fields tab. elds |
| 20. | Click the Properties link. Properties |
| 21. | Using the Distinct Option When running a query occasionally the same row of output may be listed more than once when it meets multiple query requirements. Using the Distinct option removes duplicated rows of data. However, the end-user should note that this option may remove pertinent duplicated information, depending on the query. Therefore, if the end-user is not sure if any pertinent data will be removed by selecting this option, the safer alternative would be to run the query results to Excel and manipulate the data in the spreadsheet. If the end-user is confident that pertinent data will not be removed, then the Distinct option is available. Click the Distinct option. |
| 22. | Press the left mouse button and drag the mouse down to the desired location. |
| 23. | Click the OK button. |
| 24. | Click the Save button. Save |
| 25. | This completes <i>Format a Query</i> . End of Procedure. |

Working with Criteria and Prompts

Add a Single Criteria

Procedure

In this topic you will learn how to Add a Single Criteria.

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| | Char50 | | | | Name | 9. | Edit | - | | |
| | Char10 | | | | Dept ID | 9. | Edit | - | | |
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| | Char2 | 1D | L | | Hi Educ Lv | 9 | Edit | _ | | |
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| • | Char2 Date | 1D 2 | L | | Hi Educ Lv Start Date | 9. 9. | Edit | - | | |

| Step | Action |
|------|---|
| 1. | The user can add criteria to a field to limit the results returned and retrieve only pertinent data. In this example, you will add a <i>single</i> criterion - J - Doctorate (Academic) - to HIGHEST_EDUC_LVL. |
| | Click the HIGHEST_EDUC_LVL Add Criteria button. |
| 2. | The field name defaults into the <i>Record Alias.Fieldname</i> box. The * <i>Condition Type</i> defaults to "equal to" . <i>Choose Expression 2 Type</i> defaults to Constant . Click the Define Constant - Select Constant from List button. |
| | |
| 3. | Click the J - Doctorate (Academic) - Select Constant link. Select Constant |

| Step | Action |
|------|--|
| 4. | Click the OK button. |
| | ОК |
| 5. | Click the Run button. |
| | Run |
| 6. | A total of 22 results are retrieved. |
| | Click the Criteria tab. |
| | Crite |
| 7. | The Criteria tab now indicates HIGHEST_EDUC_LVL = J. |
| | Click the Save button. |
| 8. | This completes <i>Add a Single Criteria</i> . End of Procedure. |

Add a Group of Criteria using "In List"

Procedure

In this topic you will learn how to Add a Group of Criteria using "In List".

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| Step | Action |
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| 1. | NOTE: When changing the criteria of a field that has already been added to the Criteria tab, do not return to the Fields tab to add the field to the Criteria tab again. Doing so will cause an error in your search results. Instead, edit the field that already appears in the Criteria tab by clicking the Edit button. Click the HIGHEST_EDU_LVL Edit button. Edit |
| 2. | Select the *Condition Type to choose the "in list" option. NOTE: The "in list" *Condition Type finds data having a value that matches any one of the values in a specified list of values. Click the button to the right of the *Condition Type field. |

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| Step | Action |
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| 3. | Click the "in list" list item. |
| | in list |

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| Step | Action |
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| 4. | Click the Select List Members button. |
| | Q |
| 5. | Click the Bachelor's Level Degree Add Value button. |
| | Add Value |
| 6. | Click the Some Graduate School Add Value button. |
| | Add Value |
| 7. | To delete a value, check the box that appears in <i>front of the value</i> that you wish to delete under <i>List Members</i> and click the Delete Checked Values button. |
| 8. | Click the OK button. |
| | OK |
| 9. | Click the OK button. |
| | ОК |

| Step | Action |
|------|--|
| 10. | The Criteria tab now indicates HIGHEST_EDUC_LVL with the values G,H ,and I . Click the Save button. |
| 11. | The Criteria tab now indicates HIGHEST_EDUC_LVL with the values G,H,and I. Click the Run tab. |
| 12. | The query results are <i>limited</i> to employees whose <i>highest education level</i> is a Bachelor's Level Degree , Some Graduate School , and/or a Master Level Degree . Click the Fields tab. Fields |
| 13. | This completes <i>Add a Group Criteria using "In List.</i> " End of Procedure. |

Using "Between" Criteria

Procedure

In this topic you will learn about Using "Between" Criteria.

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| Step | Action |
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| 1. | Click the ORIG_HIRE_DT Criteria button. |
| | 9. |
| 2. | Click the button to the right of the *Condition Type field. |
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| 3. | Click the between list item. |
| | between |
| 4. | Enter the desired information into the Define Constant *Date field. Enter "010125". |
| 5. | Enter the desired information into the Define Constant 2 * Date 2 field. Enter "043025". |

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| 6. | Click the OK button. |
| | ОК |
| 7. | Click the Save button. |
| | Save |
| 8. | Click the Run tab. |
| | Run |
| 9. | In addition to the highest education level criteria level criteria established in the previous exercise, the query output now also reflects only those employees hired between 01/01/25 and 04/30/25. |
| | Click the Criteria tab. |
| | Criteria |
| 10. | This completes Using "Between" Criteria. |
| | End of Procedure. |

Create a "Prompt" for Criteria

Procedure

In this topic you will learn how to Create a Prompt for Criteria.

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| AND ~ | A.HIGHEST_EDUC_LVL - Highest Education Level | in list | ('G','H','I') | Edit | |
| AND 🗸 | A.ORIG_HIRE_DT - Original Start Date | between | 2025-01-01 AND 2025-04-30 | Edit | |
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| Step | Action |
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| 1. | Click the EHIGHEST_EDUC_LVL Edit button. |
| | Edit |
| 2. | Click the button to the right of the *Condition Type field. |

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| 3. | Click the equal to list item. |
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| Step | Action |
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| 4. | Click the Prompt option. |
| | ○ Prompt |
| 5. | Click the New Link link. |
| | New Prompt |
| 6. | NOTE: Most users will not make changes to the default values on the Edit Prompt |
| | Properties page. |
| 7. | Click the OK button. |
| | ОК |
| 8. | Your prompt is indicated in the Define Prompt box by a :1. This signifies that one prompt has been created. Additional prompts will be designated as :2, :3, etc. |
| | Click the OK button. |
| | OK |

| Step | Action |
|------|---|
| 9. | NOTE: You must Save your changes before selecting another link from the menu (e.g., Reporting Tools) by selecting the Save or Save As button. <u>There is no</u> Warning that changes will be lost. Click the Save button. Save |
| 10. | Click the Run tab. |

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| Step | Action |
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| 11. | You are prompted to select the desired highest education level. In this example, you will select Medical Doctor . Click the button to the right of the *Hi Educ Ly: field |
| | |
| 12. | Click the Medical Doctor list item. |
| | Medical Doctor |

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| Logical | Expression1 | OK | Cancel | | | Edit |
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| Step | Action |
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| 13. | Click the OK button. |
| | ОК |
| 14. | The query results display those employees whose highest education level is Medical Doctor . |
| | Click the Home button. |
| 15. | This completes <i>Create a Prompt for Criteria</i> . End of Procedure. |

Using Multiple Tables in Query

When creating a query, it may be necessary to retrieve data from more than one table (record) or specify criteria in your query from a second table. In these cases, you need to link at least two tables in one query. Query enables you to run a query that pulls information from multiple tables. When you perform a join, the records involved are linked based on common fields.

Linking multiple tables, or joining, enables Query to retrieve data from more than one table, but the query output will appear as if the data is retrieved from a single table. Working with multiple tables is almost as easy as working with one.

The three join types covered in Query Intermediate are the following:

- 1. Record Hierarchy joins parent child relationship
- 2. Related Record joins predefined relationships
- 3. Any Record joins relationships the user defines

In this lesson you wish to retrieve a query that provides a list of employees with their EmplID, Job Code, DeptID, Name and Job Title (Descr). The Personal_Data record contains the EmplID and Name fields. The Job record contains the Job Code and DeptID fields, but not the Descr field. The Descr field is found in the Jobcode table. Therefore, it will be necessary to pull the fields from three different tables (Personal_Data, Job and Jobcode) to retrieve the desired query results.

Any Record Joins and Related Record Joins

Procedure

In this topic you will learn how to use Any Record Joins and Related Records Joins.

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| Step | Action |
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| 1. | Click the NavBar button. |
| 2. | Click the Menu button. |
| 3. | Click the Reporting Tools menu. Reporting Tools > |
| 4. | Click the Query menu. Query |
| 5. | Click the Query Manager button. Query Manager |
| 6. | Click the Create New Query link. Create New Query |

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| Step | Action |
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| 7. | In this example, you will create a query using a "Any Record Join" and a "Related Record Join" to create a list of <i>employees</i> , <i>dept ids</i> , and <i>job titles</i> and <i>descriptions</i> . |
| | Search for the record Personal_Data . |
| | Enter the desired information into the *Search By field. Enter "PERSONAL ". |

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| Step | Action |
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| 8. | Click the Search button. |
| | Search |
| 9. | Click the PERSONAL_DATA Add Record link. |
| | Add Record |
| 10. | NOTE: Query displays a letter in front of each record or table. This letter is an alias that represents the record or table. When joining records or tables, Query assigns subsequent letters. |
| | Click the EMPLID - Empl Id option. |
| | |
| 11. | Click the NAME - Name option. |
| | |
| 12. | NOTE: This is an "Any Record Join." |
| | Click the Record tab. |
| | Records |

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| Recname | | | | | Join R | ecord | s | Show Fields | | | | |
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| PERSONAL_DT_FST - PERSONAL_DT_FST | | | | Join Record Show | | | Show Fields | | | | | |
| PERSONAL_PH | HONE - Pers | onal Data - Phone | Numbers | | Join Re | ecord | s | Show Fields | | | | |
| PERSONAL_V | N - Personal | Data Name View | | | Join R | ecord | s | Show Fields | | | | |
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| Step | Action |
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| 13. | In this example, you will search for the JOB - EE Job History . |
| | Enter the desired information into the *Search By field. Enter "JOB" . |

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| Recname | | | | | Join Record | Sho | w Fields | | | |
| PERSONAL | _DATA - PERSO | DNAL_DATA for R | oting | | Join Record | Sho | w Fields | | | |
| PERSONAL | _DTA_VW - EE | Personal Data Vie | w | | Join Record | Sho | w Fields | | | |
| PERSONAL | _DT_FST - PEF | RSONAL_DT_FST | | | Join Record | Sho | w Fields | | | |
| PERSONAL | _PHONE - Pers | sonal Data - Phone | Numbers | | Join Record | Sho | w Fields | | | |
| PERSONAL | VW - Persona | I Data Name View | | | Join Record | Sho | w Fields | | | |
| Save | Save | As | New Query | | Preference | es | Proper | ties | | |
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| Step | Action |
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| 14. | Click the Search button. |
| | Search |
| 15. | Click the JOB - EE Job History Join Record link. |
| | Join Record |
| 16. | The Join Type defaults to a <i>Standard Join</i> and will remain as defaulted. |
| | The Join Record defaults to our first record $A = PERSONAL_DATA - PERSONAL_DATA$ for Rpting. Click the A = PERSONAL_DATA - PERSONAL_DATA for Rpting link. |
| | A = PERSONAL_DATA - PERSONAL_DATA for Rpting |
| 17. | NOTE: The Query tool has detected alike fields in both queries. In most cases, you should continue with the default fields. |
| | Click the Add Criteria button. |
| | Add Criteria |

| Step | Action |
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| 18. | Click the OK button. |
| | OK |

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| | | SCODE - Job Code | n Number | | | Join JOBCC | DE_TBL - Job Co | des | 74 92 | |
| | | PERVISOR_ID - Supe | rvisor ID | | | | | | 9 | |
| | | STATUS - HR Status | | | | | | | 9 <mark>4</mark> | |
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| 19. | Click the DEPTID - Department option. |

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| | | 6 6 6 | EMPL_RCD - Empl Record EFFDT - Effective Date EFFSEQ - Effective Sequence PER_ORG - Organizational Relationship DEPTID - Department JOBCODE - Job Code POSITION_NBR - Position Number SUPERVISOR_ID - Supervisor ID HR_STATUS - HR Status APPT_TYPE - Appointment Type MAIN_APPT_NUM_JPN - Main Appointment Number POSITION_OVERRIDE - Override Position Data POSN_CHANGE_RECORD - Position Management Record EMPL_STATUS - Payroll Status ACTION_Action ACTION_ERASON - Reason Code | Join DEPT_TBL - Departments Join JOBCODE_TBL - Job Codes Join ACTION_TBL - ACTION Setup Table Join ACTION_TBL - ACTION Setup Table | පර ප | |
| | | | LOCATION - Location Code TAX_LOCATION_CD - Tax Location Code JOB_ENTRY_DT - Job Entry Date DEPT_ENTRY_DT - Department Entry Date POSITION_ENTRY_DT - Position Entry Date SHIFT - Regular Shift REG_TEMP - Regular/Temporary EUL _ EAPT_TIME_E-different Tamo | Combinations | 0° 0° 0° 0° 0° 0° 0° 0° | |
| | | | COMPANY - Company | Join COMPANY_TBL - Company Codes | 8 | |

| Step | Action |
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| 20. | Click the JOBCODE - Job Code option. |
| 21. | Click the Join JOBCODE_TBL - Job Codes link. Join JOBCODE_TBL - Job Codes |
| 22. | The Join Type defaults to <i>Standard Join</i> and will remain as defaulted. Click the OK button. |
| 23. | Click the OK button. |
| 24. | Click the DESCR - Description option. |
| 25. | Click the Fields tab. Fields |

| Step | Action |
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| 26. | NOTE: Query displays a letter in front of each field. This letter is an alias that represents the record or table from which the field was pulled. When joining records or tables, Query assigns subsequent letters. |
| | Click the Save As link. Save As |

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| Step | Action |
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| 27. | Enter the desired information into the *Query field. Enter "EMPL_JOB_TITLES". |
| 28. | Enter the desired information into the Description field. Enter "EMPLOYEE JOB TITLES ". |
| 29. | Enter the desired information into the Query Definition field. Enter "05/19/25". |
| 30. | Enter the desired information into the Query Definition field. Enter " CLASS EXERCISE ". |

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