



HCM Query Basic - Fluid

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Training Guide
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.

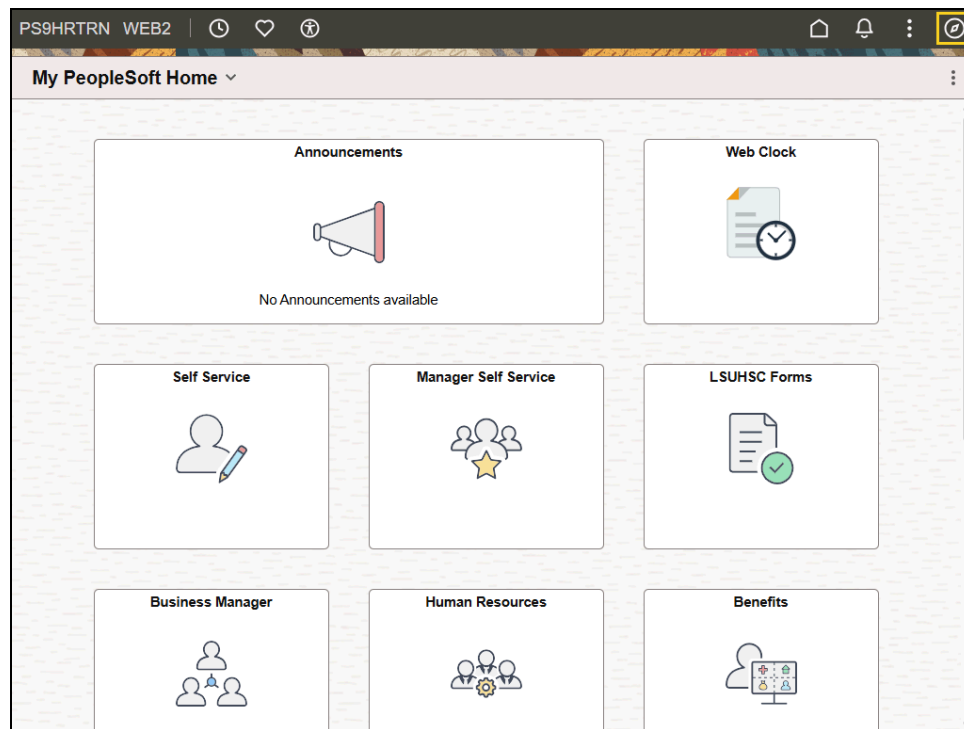
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Run an Existing Query

Procedure

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


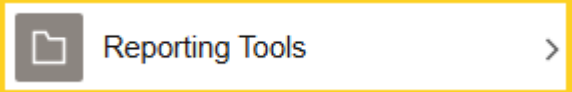

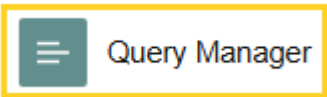
Step	Action
1.	<p>What is a Query?</p> <p>A Query is a request for data or information from a database. It allows the end-user to interact with the system to retrieve, manipulate, and/or analyze data. The system stores data in tables when it is entered. Tables are comprised of Records (rows) and Fields (columns).</p> <p>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).</p>

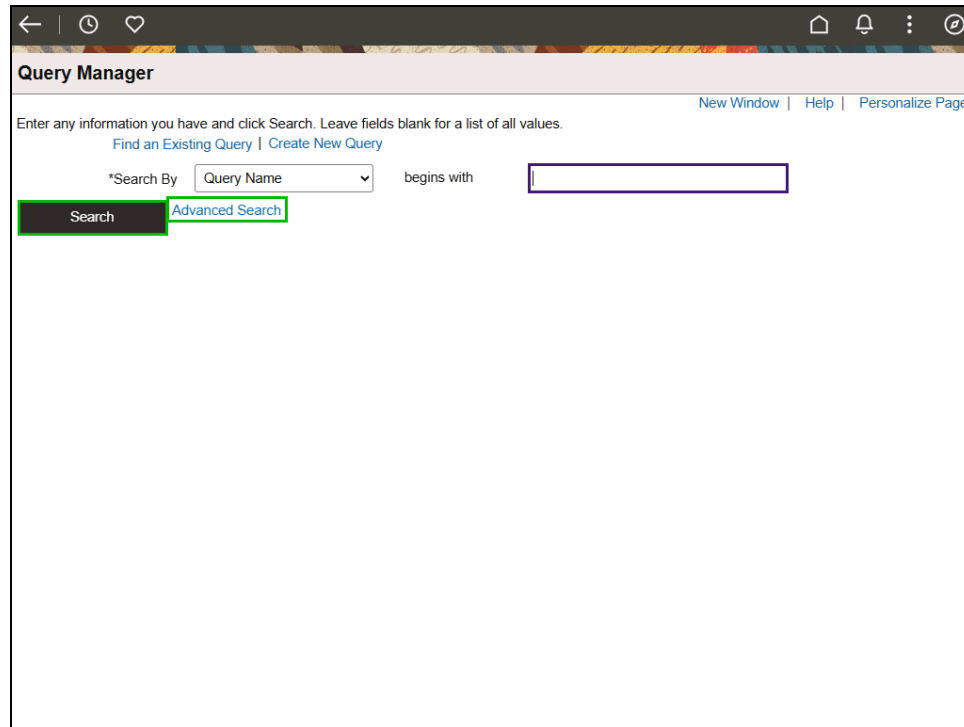



Step	Action
2.	<p>Click the NavBar button.</p> 

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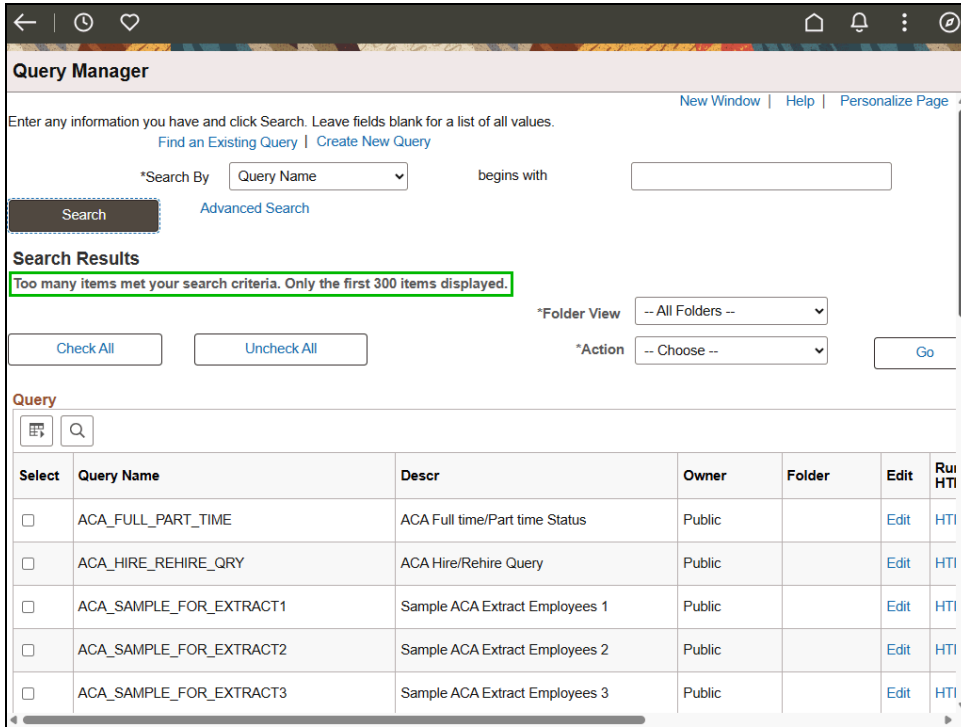
Step	Action
3.	Click the Menu button.  Menu
4.	Click the Reporting Tools button. 
5.	Click the Query button. 
6.	Click the Query Manager button. 



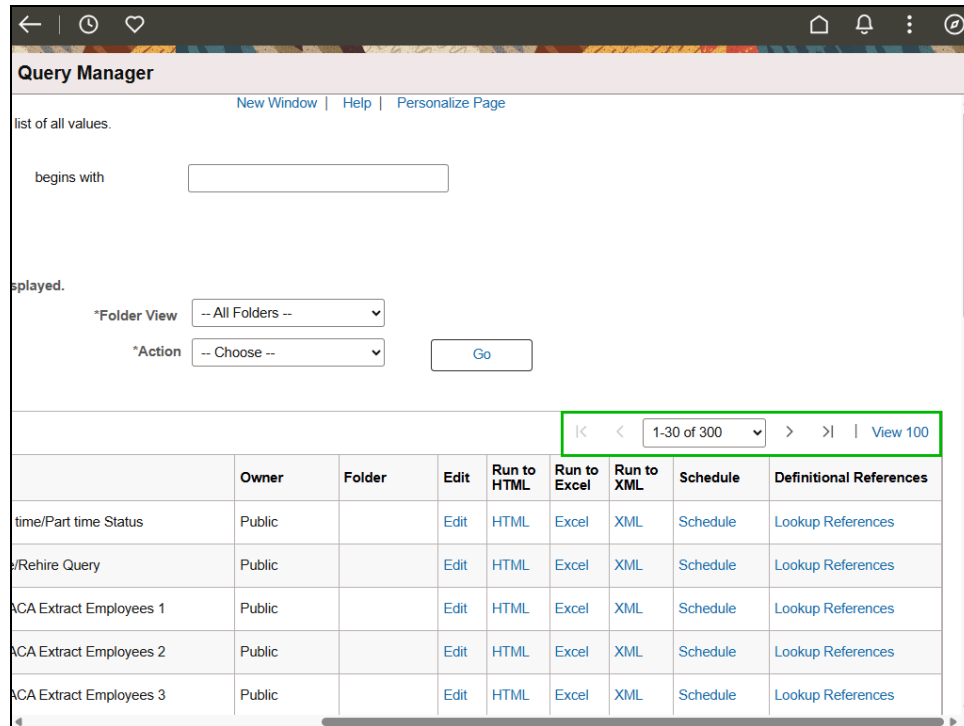
Step	Action
7.	<p>When Query Manager is opened, it defaults the user onto the Find an Existing Query option. The user may view existing queries utilizing one of the following methods:</p> <ol style="list-style-type: none"> 1. Enter appropriate search criteria (query name) into the <i>*Search By</i> field. The user <u>must</u> enter <i>all or part</i> of the query name. Use the % (<i>percent sign</i>) 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.	<p>Click the Search button.</p> <p>NOTE: <i>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.</i></p> <div style="text-align: center;">  </div>

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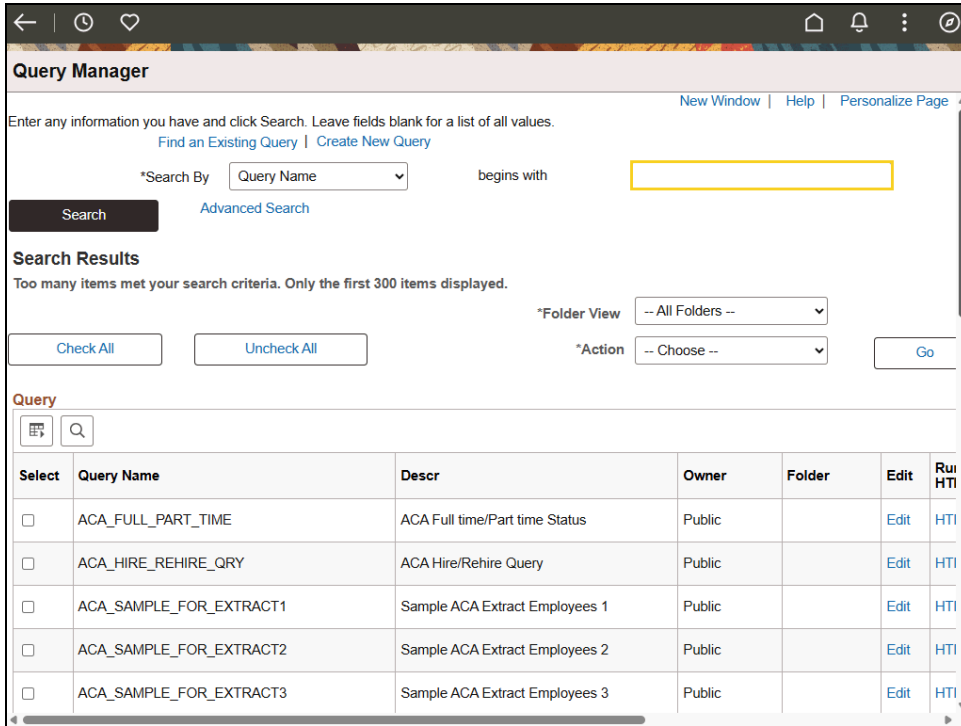
Step	Action
9.	A message appears under the Search button stating there are 'too many items met your search criteria.' Thus, only the first 300 items can be displayed.




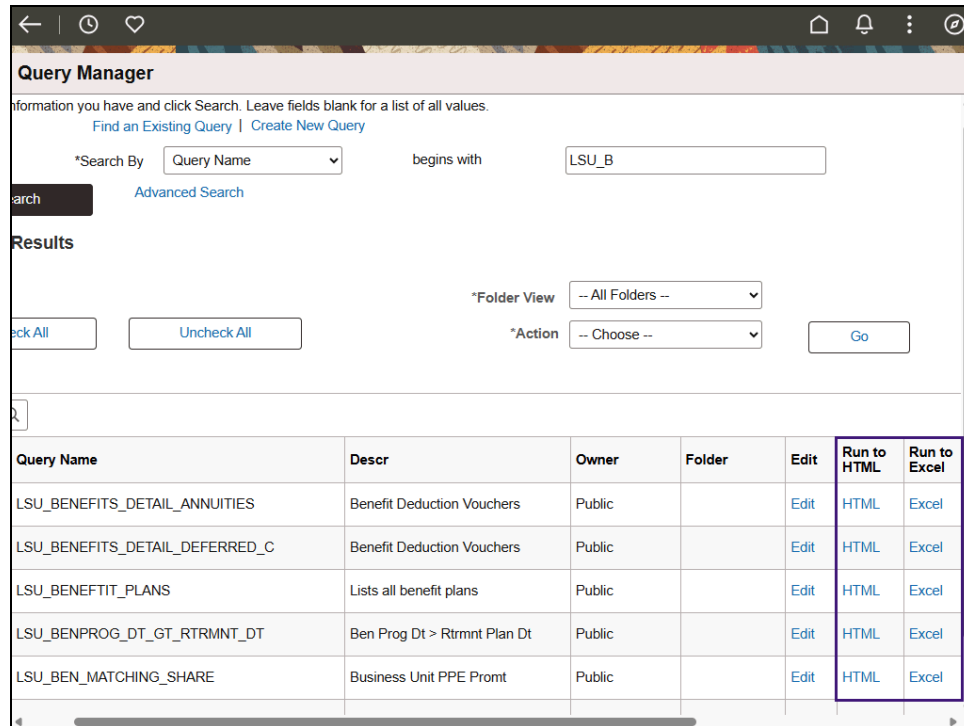
Step	Action
10.	The total number of queries retrieved displays on the far-right side of the page as well. In this example, it shows that the <i>first 30 query results</i> are displayed in the window. Users can select View 100 to <i>view one hundred queries</i> at a time.
11.	The arrows allow you to navigate from page to page. The <i>right arrow</i> allows you to view the <i>next 30 queries</i> . 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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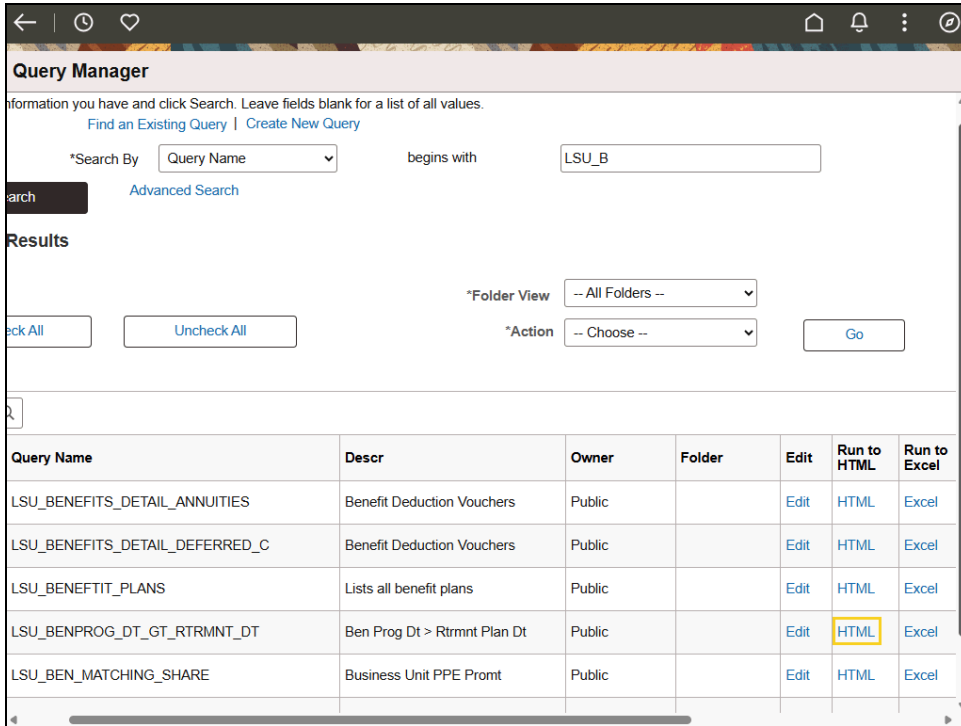
Step	Action
12.	<p>Users can <i>reduce</i> the number of queries retrieved by <i>entering all or part</i> of the <i>query name</i> in the <i>Search By</i> field. In this example, you will search for the query LSU_BENPROG_DT_GT_RTRMNT_DT.</p> <p>Enter the desired information into the LSU_B field. Enter "LSU_B".</p>
13.	<p>Click the Search button.</p> 




Step	Action
14.	<p>There are two formats in which users can view query results:</p> <ol style="list-style-type: none"> 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. 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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Step	Action
15.	Click the LSU_BENPROG_DT_GT_RTRMNT_DT HTML link. 

LSU_BENPROG_DT_GT_RTRMNT_DT - Ben Prog Dt > Rtrmnt Plan Dt

*Business Unit: Q

View Results

Row	ID	Name	Ben Progm	Eff Date	Plan Typ	Ded Begin	Covrg Elec	Plan	Unit
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Step	Action
16.	<p>Enter the desired information into the *Business Unit field. Enter "LSUNO".</p> <p><i>NOTE: Other Business Units will use the following designations:</i></p> <p><i>Shreveport - LSUSH</i></p> <p><i>Lallie Kemp - LAKMC</i></p> <p><i>HCSD HQTRS - HCSDA</i></p>

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LSU_BENPROG_DT_GT_RTRMNT_DT - Ben Prog Dt > Rtrmnt Plan Dt

*Business Unit:

Row	ID	Name	Ben Progm	Eff Date	Plan Typ	Ded Begin	Covrg Elec	Plan	Unit
-----	----	------	-----------	----------	----------	-----------	------------	------	------

Step	Action
17.	Click the View Results button. <input type="button" value="View Results"/>

LSU_BENPROG_DT_GT_RTRMNT_DT - Ben Prog Dt > Rtrmnt Plan Dt

*Business Unit:

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File \(46 kb\)](#)

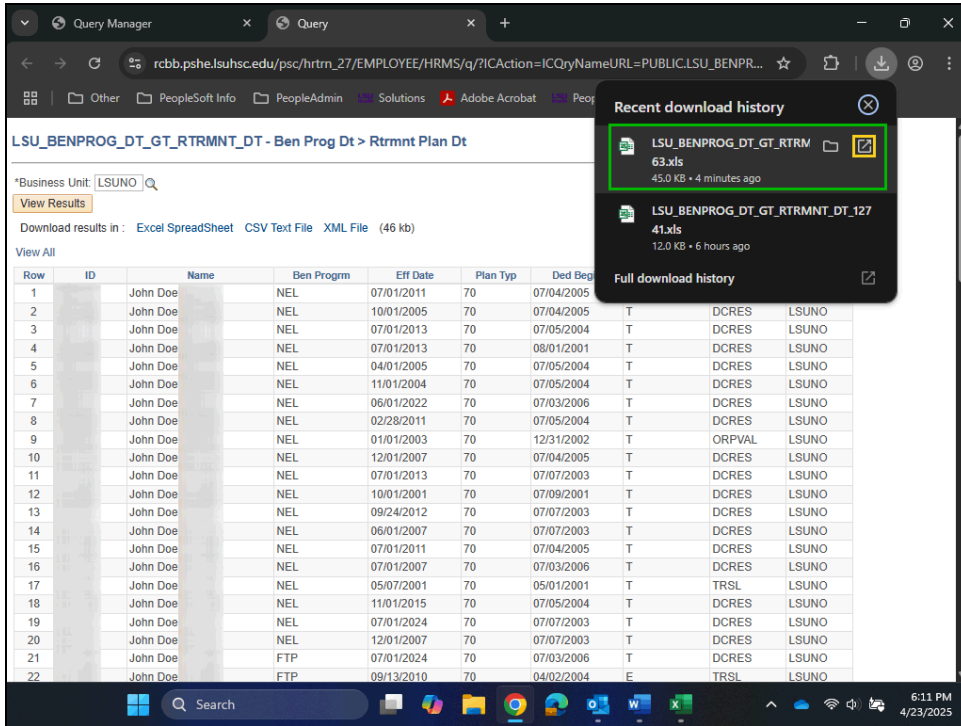
View All First 1-100 of 216



Row	ID	Name	Ben Progrm	Eff Date	Plan Typ	Ded Begin	Covrg Elec	Plan	Unit
1		John Doe	NEL	07/01/2011	70	07/04/2005	T	DCRES	LSUNO
2		John Doe	NEL	10/01/2005	70	07/04/2005	T	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	T	DCRES	LSUNO
6		John Doe	NEL	11/01/2004	70	07/05/2004	T	DCRES	LSUNO
7		John Doe	NEL	06/01/2022	70	07/03/2006	T	DCRES	LSUNO
8		John Doe	NEL	02/28/2011	70	07/05/2004	T	DCRES	LSUNO
9		John Doe	NEL	01/01/2003	70	12/31/2002	T	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	T	DCRES	LSUNO
12		John Doe	NEL	10/01/2001	70	07/09/2001	T	DCRES	LSUNO
13		John Doe	NEL	09/24/2012	70	07/07/2003	T	DCRES	LSUNO
14		John Doe	NEL	06/01/2007	70	07/07/2003	T	DCRES	LSUNO
15		John Doe	NEL	07/01/2011	70	07/04/2005	T	DCRES	LSUNO
16		John Doe	NEL	07/01/2007	70	07/03/2006	T	DCRES	LSUNO
17		John Doe	NEL	05/07/2001	70	05/01/2001	T	TRSL	LSUNO
18		John Doe	NEL	11/01/2015	70	07/05/2004	T	DCRES	LSUNO
19		John Doe	NEL	07/01/2024	70	07/07/2003	T	DCRES	LSUNO
20		John Doe	NEL	12/01/2007	70	07/07/2003	T	DCRES	LSUNO
21		John Doe	FTP	07/01/2024	70	07/03/2006	T	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	T	DCRES	LSUNO
24		John Doe	NEL	03/01/2022	70	07/07/2003	T	DCRES	LSUNO
25		John Doe	NEL	10/15/2010	70	07/01/2001	T	DCRES	LSUNO
26		John Doe	NEL	07/01/2007	70	07/04/2005	T	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	T	DCRES	LSUNO
29		John Doe	NEL	07/29/2013	70	07/01/2001	T	DCRES	LSUNO
30		John Doe	NEL	09/01/2007	70	07/02/2007	T	DCRES	LSUNO

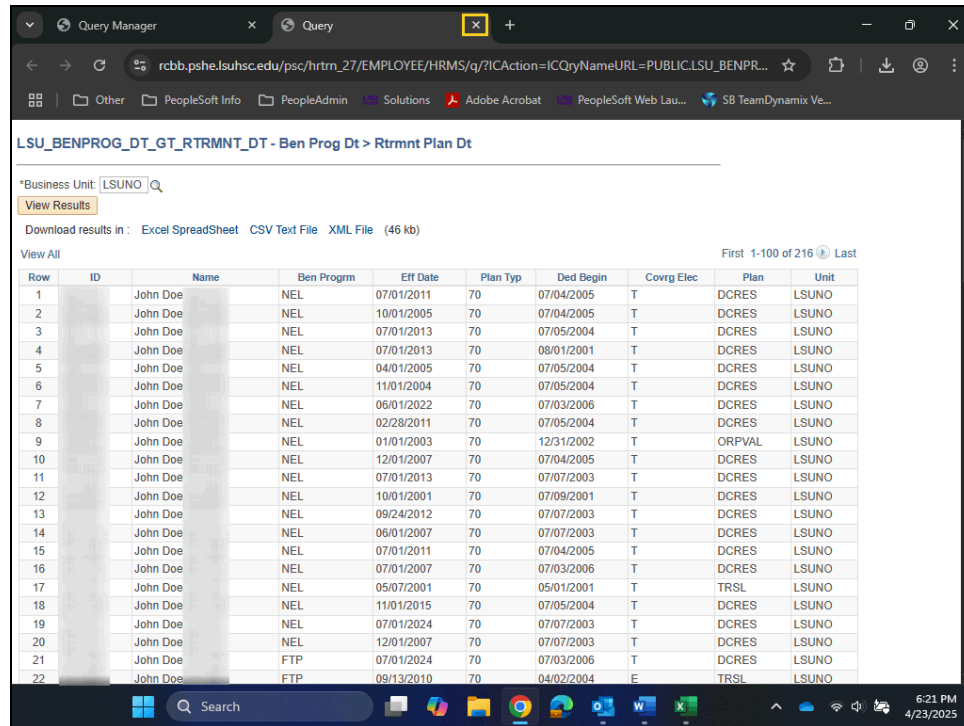
Step	Action
18.	<p>Click the Excel Spreadsheet link.</p> <p><i>NOTE: A new window opens to display your Excel Spreadsheet.</i></p> <p>Excel Spreadsheet</p>



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Step	Action
19.	Click the LSU_BENPROG_DT_GT_RTRM Open button. 
20.	Your results display. Click the Close button. 



Step	Action
21.	Click the Close tab. 
22.	Click the LSU_BENPROG_DT_GT_RTRMNT_DT Excel link. 

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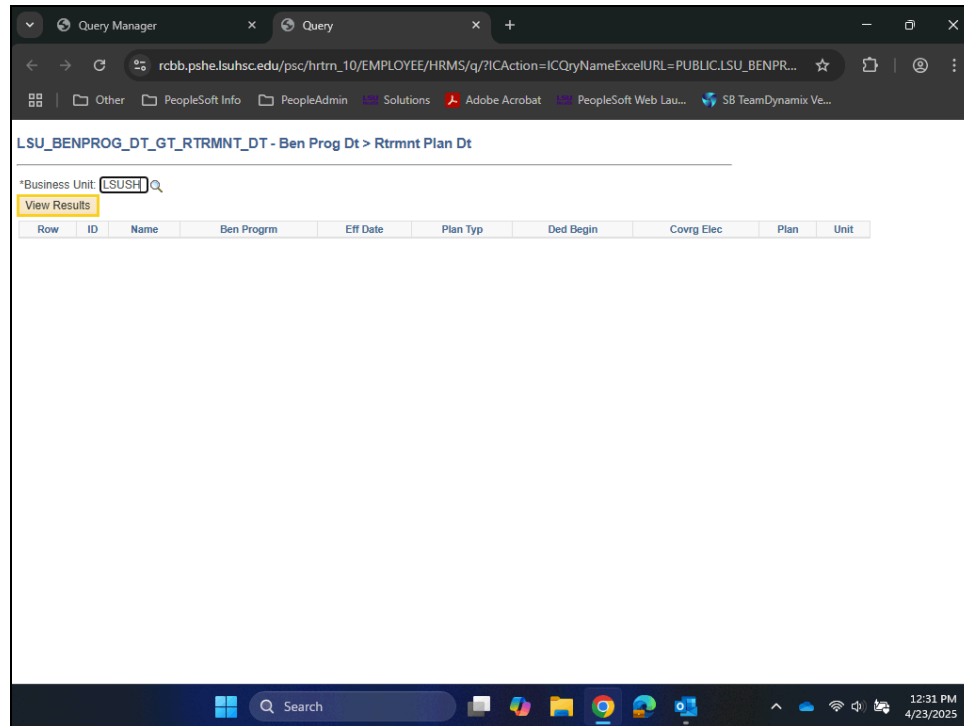
LSU_BENPROG_DT_GT_RTRMNT_DT - Ben Prog Dt > Rtrmnt Plan Dt


*Business Unit: Q

View Results

Row	ID	Name	Ben Progm	Eff Date	Plan Typ	Ded Begin	Covrg Elec	Plan	Unit
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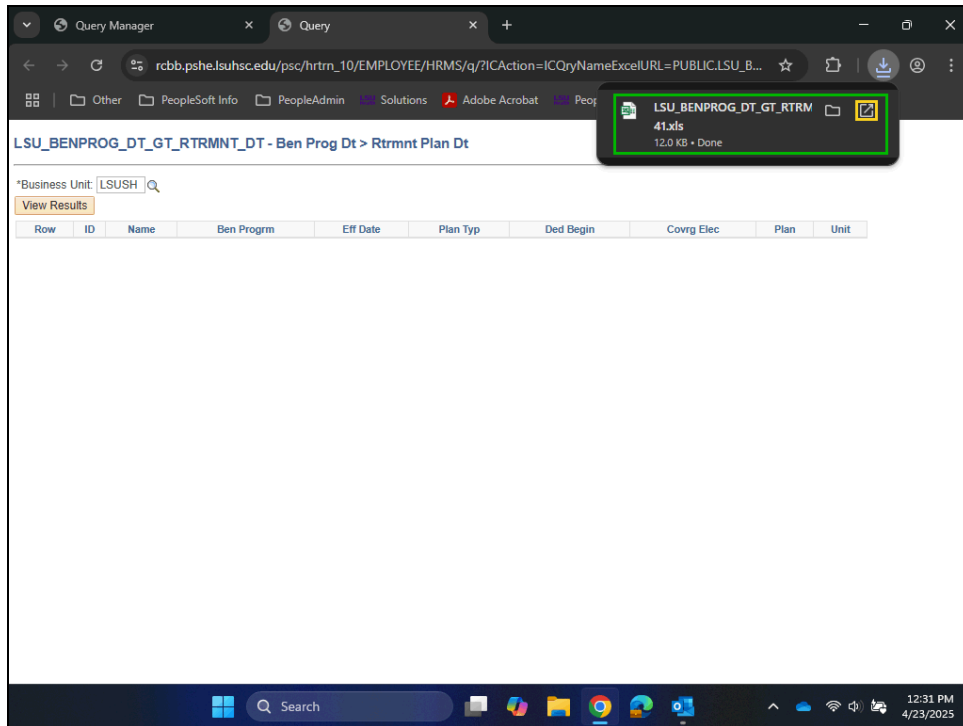
Step	Action
23.	<p>Enter the desired information into the *Business Unit field. Enter "LSUSH".</p> <p><i>NOTE: Other Business Units will use the following designations:</i></p> <p><i>New Orleans - LSUNO</i></p> <p><i>Lallie Kemp - LAKMC</i></p> <p><i>HCSD HQTRS - HCSDA</i></p>




Step	Action
24.	Click the View Results button. 

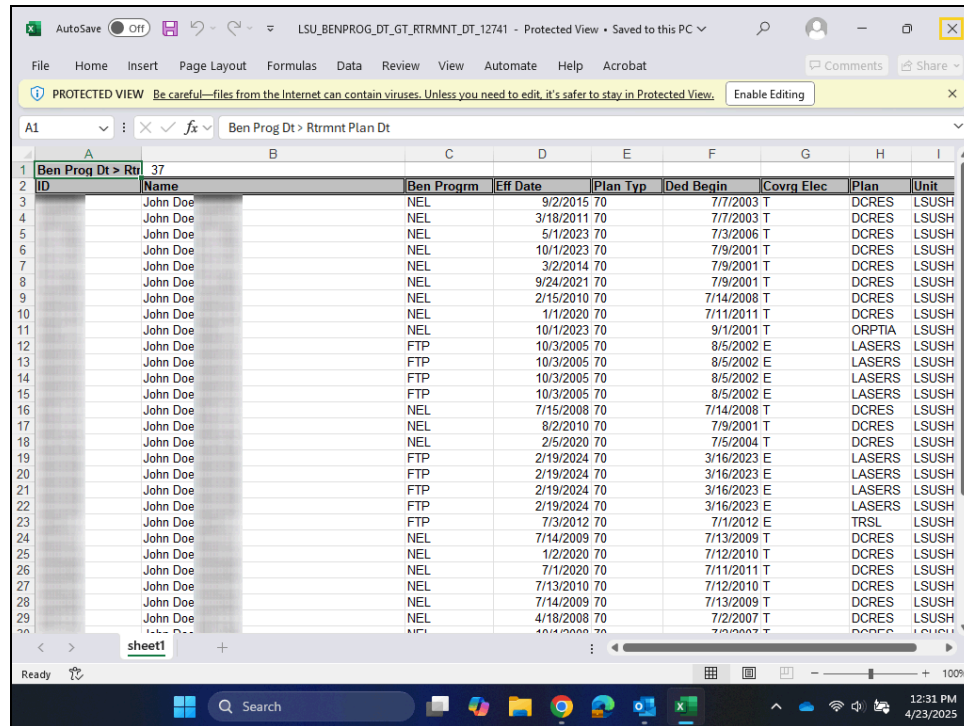
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Step	Action
25.	Click the LSU_BENPROG_DT_GT_RTRM Open button. 

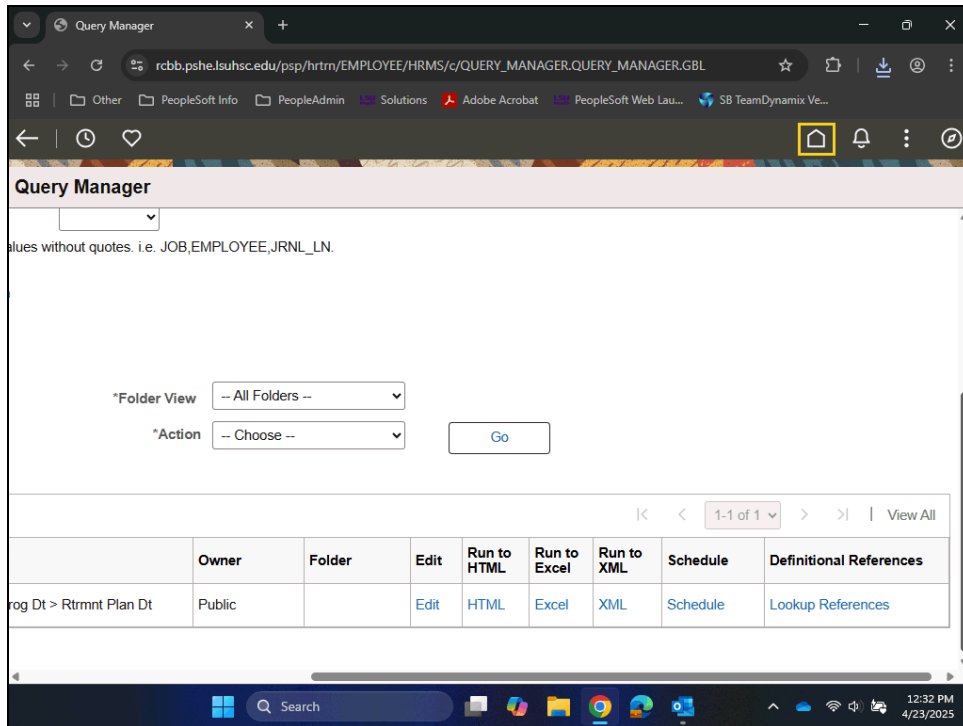
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Step	Action
26.	Click the Close button. 
27.	Click the Close tab. 

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Step	Action
28.	Click the Home button. 
29.	This completes <i>Run an Existing Query</i> . End of Procedure.