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Lesson 1: Overview

Discussion

The **Query Manager** and **Query Viewer** are accessed through the PeopleSoft SA/HR menu.

- The <u>Query Manager</u> allows access to all the data stored in the PeopleSoft SA/HR database: historical, current and future. You can run existing queries that use data to which you have security access and, if your security level allows, you can create queries based on the data to which you have security access.

  The Query Manager is organized into 9 pages. Each page heading refers to a specific action that may be used when creating or editing a query.

- The <u>Query Viewer</u> is a read-only version of Query Manager. It is used by individuals who only need to view or print queries.

This course is for UA employees who need to run existing queries in PeopleSoft SA/HR version 9 and save or print the results. This also is the first of two courses required for UA employees who wish to request security to modify and write queries. An introduction to creating a query using a single table (record) is reviewed.

At the end of this course, you will be able to:

- Locate and run an existing query
- Run a query to Excel
- Print the query results
- Create a basic query
- Select a record (table) for a query
- Select fields for a query
- Edit field properties
- Use select criteria in a query
- Edit query properties
- Set the query property of Distinct
- Save a query as public or private and use naming conventions

Lesson 2: Locate an Existing Query

Discussion

To locate an existing query, sign in to PeopleSoft and navigate to the Query Viewer using the **path:** Reporting Tools > Query > Query Viewer.

The Query Viewer basic search page is displayed. The field on this page is not case sensitive.

- On the Query Viewer basic search page, you may search for a query by the first few characters of the name or the first few characters of the query's description. You only need to know the beginning of the name or description in order to search.

- If the part of the name or description that you know may not be at the beginning of the name or description, click on the Advanced Search link. At the down arrow for name or description, select "contains."

- Then, type the part of the name or description that you know and click on the Search button. Select the query you need from the Search Results list.

In PeopleSoft version 9, only 300 rows may be returned in Search Results. This is not a limit on query results rows (the answer to your query); it is only a limit on Search Results displayed on the search pages.

Please see Appendix B for a list of sample queries that are representative of the questions that are asked by queries at The University of Akron. See Appendix C for information about naming conventions to follow when you save a query or need to locate a query written by someone else.

Basic Search

Steps
1. Sign-in to PeopleSoft Student Administration/HR version 9 with the UserID and password that your instructor has given you.   The home page of PeopleSoft is displayed.
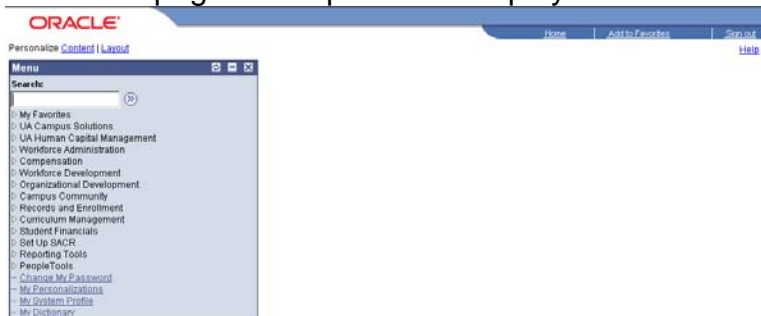
Steps

2. Select the following **path** to use the Query Viewer:

    Reporting Tools > Query > Query Viewer

    The Query Viewer basic search page is displayed.

    Query Viewer

    Enter any information you have and click Search. Leave fields blank for a list of all values.

    *Search By: | Query Name ▼ | begins with | _____ |

    [Search]   Advanced Search

    > Use the Search by fields to locate an existing query.

3. Select the criteria to locate the query you need.
    a. Search by <u>Query Name</u> or <u>Description</u> by selecting at the down arrow.

        In class, select **Query Name**.

    b. In the edit box of the Search by row, <u>type the text</u> that is the beginning of the query's name or description.

        In class, type **upkr.**

    The criteria for your search are entered.

    Query Viewer

    Enter any information you have and click Search. Leave fields blank for a list of all values.

    *Search By: | Query Name ▼ | begins with | UPKR |

    [Search]   Advanced Search

    > The edit box is not case sensitive.

Steps

4. Click Search .

    The queries that match your criteria are displayed in the Search Results at the bottom of the page.

    Query Viewer

    Enter any information you have and click Search. Leave fields blank for a list of all values.

    *Search By: [Query Name ▾]   begins with   [UPKR]

    [Search]   Advanced Search

    Search Results

    *Folder View: [-- All Folders -- ▾]

Query							
			Customize | Find | View All |	First ◀ 1-14 of 14 ▶ Last			
Query Name	**Description**	**Owner**	**Folder**	**Run to HTML**	**Run to Excel**	**Schedule**	**Add to Favorites**
UPKR_COPY_QRY2	Query for class	Private		HTML	Excel	Schedule	Favorite
UPKR_HRQUERY_CLASS	MY DEPT DATA	Private		HTML	Excel	Schedule	Favorite
UPKR2_NRSGRAD_CRBYTERM_NSERGRP	UA_NURS_GRAD_CR_BYTERM_STUDGRP	Public		HTML	Excel	Schedule	Favorite
UPKR_COPY_QRY	Query for class	Public	CLASS QUERY	HTML	Excel	Schedule	Favorite
UPKR_DEGREES_AWARDED	Degrees Only by Term	Public		HTML	Excel	Schedule	Favorite

    > The number of queries returned is given in the view tools area.

Advanced Search

Steps
1. Select the following **path** to use the Query Viewer: **Reporting Tools > Query > Query Viewer**   The Query Viewer basic search page is displayed.   **Query Viewer**   Enter any information you have and click Search. Leave fields blank for a list of all values.   *Search By: Query Name ▼   begins with _____   Search   Advanced Search
2. Click on the **Advanced Search** link.   **Query Viewer**   Enter any information you have and click Search. Leave fields blank for a list of all values.   Query Name: begins with ▼ _____   Description: begins with ▼ _____   The edit box is not case sensitive.   Uses Record Name: begins with ▼ _____   Uses Field Name: begins with ▼ _____   Access Group Name: begins with ▼ _____ 🔍   Folder Name: begins with ▼ _____   Owner: =   _____ ▼   When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.   Search   Clear   Basic Search
3. Select the criteria to locate the query that you need. The following selections are one example.   In class, use the following criteria to locate a query where you know a few characters in its description.   Search by **Description**.   Select **contains** from the list at the down arrow.   In the edit box of the Description row, <u>type the text</u> that is a part of the query's description.   In class, type **example**.

Steps

4. Click Search .
   The queries that match your criteria are displayed in the Search Results at the bottom of the page.

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

Field	Operator	Value
Query Name:	begins with	
Description:	contains	EXAMPLE
Uses Record Name:	begins with	
Uses Field Name:	begins with	
Access Group Name:	begins with	
Folder Name:	begins with	
'Query Type:	=	User
Owner:	=	

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

Search   Clear   Basic Search

Search Results

'Folder View: -- All Folders --

Query	Customize	Find	View All		First ◄ 1-3 of 3 ► Last

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
UAAH_WHIMP	Class Example	Private	CLASS4	HTML	Excel	Schedule	Favorite
UA_R_TIME_CONVERSION_EXAMPLE	TIME CONVERSION EXAMPLE	Public		HTML	Excel	Schedule	Favorite
UPKR_COPY2_QRY	Example Query for class	Public	CLASS QUERY	HTML	Excel	Schedule	Favorite

The number of queries returned is given in the view tools area.

5. Leave the search results on your screen to use in the next lesson.

Lesson 3: Run an Existing Query

Steps
1. Enter the **path** to the Query Viewer: **Reporting Tools > Query > Query Viewer** The Query Viewer basic search page is displayed. **Query Viewer** Enter any information you have and click Search. Leave fields blank for a list of all values. ***Search By:** [Query Name ▼]   begins with   [   ] [Search]   Advanced Search
2. Select the criteria to locate the query you need. (See Lesson 2 for detailed instructions.)
3. Click [Search]. The queries that match your criteria are displayed in the Search Results at the bottom of the page. At the end of the Lesson 2, you had search results similar to what are shown below. **Search Results** **'Folder View:** [-- All Folders -- ▼] **Query** — Customize | Find | View All | ▦ First ◄ 1-3 of 3 ► Last 	Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
---	---	---	---	---	---	---	---
UAAH_WHIMP	Class Example	Private	CLASS4	HTML	Excel	Schedule	Favorite
UA_R_TIME_CONVERSION_EXAMPLE	TIME CONVERSION EXAMPLE	Public		HTML	Excel	Schedule	Favorite
UPKR_COPY2_QRY	Example Query for class	Public	CLASS QUERY	HTML	Excel	Schedule	Favorite	
4. Locate the query in the search results and select the link for **HTML** (to open the query in the web browser) or **Excel** (to run the query directly to a Microsoft Excel spreadsheet). In class, click on the **HTML** link for the query PKR_COPY2_QRY. A second, separate window opens in the Internet Explorer. In that window, one of two things will occur. a. The query will run and the results are displayed. b. You will be prompted for criteria. In this example, you will be prompted to enter the Term, as shown on the next page.

Steps

	ID	Term	Career	Elig Enrl	Prim Prog

Term: [   ] 🔍

View Results

---

5. Enter the criteria.
   Use the Lookup tool 🔍 if you are uncertain of the appropriate values to enter.

   In class, click on 🔍.
   The Lookup page for that field is displayed.

   ## Look Up Term

   Search by: [Term ▼] begins with [   ]

   [Look Up] [Cancel] Advanced Lookup

---

6. Click on [Lookup] .
   A list of the valid values for the Term field is displayed.

   ### Look Up Term

   Search by: [Term ▼] begins with [   ]

   [Look Up] [Cancel] Advanced Lookup

   Search Results
   Only the first 300 results can be displayed. Enter more information above and search again to reduce the number of search results.
   View All   First ◄ 1-100 of 300 ► Last

Term	Description	Short Description
9999	End Term - Srvc Indicator Use	End Term
4177	2017 Fall	2017 Fall
4173	2017 Summer	2017 Summe
4171	2017 Spring	2017 Sprin
4167	2016 Fall	2016 Fall

---

7. Click on the link for **2008 Fall**.
   The valid value for the 2008 Fall term populates the Term field.

   Term: [4087] 🔍

   View Results

---

8. Click on [View Results] to run the query.
   The query results are displayed.

Steps

This page is meant as a preview page. To print, save or manipulate the data, select one of the export options, which appear as links on the page.

Term: 4087 🔍

View Results

The export options

When the results of the query are displayed, the number of rows returned is noted in the View tools area.

Download results in : Excel SpreadSheet   CSV Text File (199 kb)

Do not use this link unless you have a small number of rows.

View All

◄ 1-100 of 3331 ► Last

	ID	Term	Career	Elig Enrl	Prim Prog
1		4087	UGRD	Y	FAAUP
2		4087	UGRD	Y	FAAU
3		4087	UGRD	Y	FAAUP
4		4087	UGRD	Y	FAAUP
5		4087	UGRD	Y	FAAUP
6		4087	UGRD	Y	FAAUP
7		4087	UGRD	Y	FAAU
8		4087	UGRD	Y	FAAU
9		4087	UGRD	Y	FAAU

Unless the query results consist of a small number of rows, the **View All** link is not the method to review your data.

The Excel file may open in Internet Explorer, rather than opening in Excel. In Appendix D, see the instructions labeled "Configuring the Internet Explorer." These instructions are for changing the settings on your computer so that the files will open in the appropriate program.

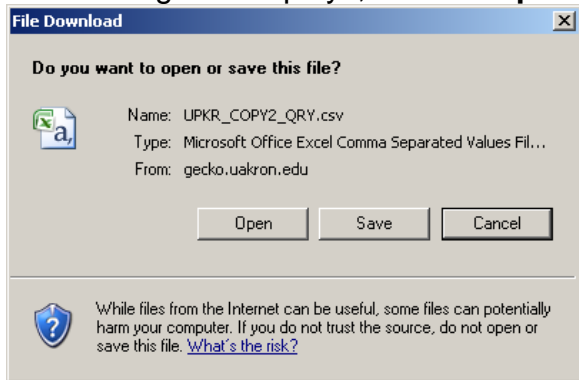# Lesson 4: View, Print and Save the Query Results

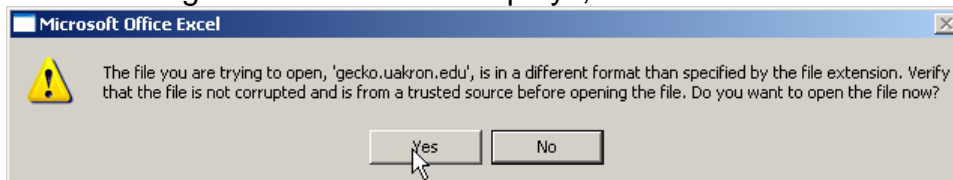| Steps |
|---|
| 1. Select one of the two options to download the query results.

Download results in : Excel SpreadSheet CSV Text File

In class, select **CSV Text File** .

  a. Select Excel Spreadsheet for data that has been formatted for a report appearance.
  b. Select CSV (Comma Separated Values) for data that has little formatting. This file may be opened in Excel or a database program such as Access. The CSV format is recommended if the data will be used for a Word Mail Merge. |
| 2. If this dialog box displays, click on **Open**.

File Download

Do you want to open or save this file?

Name: UPKR_COPY2_QRY.csv
Type: Microsoft Office Excel Comma Separated Values Fil…
From: gecko.uakron.edu

  Open   Save   Cancel

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk? |
| 3. If this message from Excel 2007 displays, click on **Yes**.

Microsoft Office Excel

The file you are trying to open, 'gecko.uakron.edu', is in a different format than specified by the file extension. Verify that the file is not corrupted and is from a trusted source before opening the file. Do you want to open the file now?

  Yes   No |
| 4. Excel opens and the query results display in a worksheet. |

UPKR_COPY2_QRY[1].csv

	A	B	C	D	E	F	G	H
1	ID	Term	Career	Elig Enrl	Prim Prog			
2		4087	UGRD	Y	FAAUP			
3		4087	UGRD	Y	FAAU			
4		4087	UGRD	Y	FAAUP			
5		4087	UGRD	Y	FAAUP			
6		4087	UGRD	Y	FAAUP			
7		4087	UGRD	Y	FAAUP			

Steps
5. To format the Excel worksheet for printing, see the Excel Quick Guide handouts. (These guides are available at the Software Training website: http://www.uakron.edu/its/learning/training/index.php)
6. When the results have been formatted, use the File, Print menu option in Excel 2003 or the Office button and the Print option in Excel 2007 to print the query results.   **NOTE**: If the query results are only a few rows, you may consider using the File, Print option from the Internet Explorer menu. It is recommended that you check at File, Print Preview to be sure that it will print as you need. Use File, Page Setup to landscape the paper and/or change the paper size.
7. When you have completed your work with the query results, close Excel.
8. Close the query results window in the Internet Explorer. The Query Viewer window displays.

Lesson 5: Set a Query as a Favorite in Query Viewer

In the Query Viewer search results, there are links to set a query as a Favorite.

Steps

1. Complete the search for the query as outlined in Lesson 2.

2. In the search results, locate the query to be set as a favorite.
   In class, locate the UPKR_COPY2_QRY.

   Search Results

   'Folder View: -- All Folders -- ▼

Query					Run to HTML	Run to Excel	Schedule	Add to Favorites
Query Name	**Description**		**Owner**	**Folder**				
UAAH_WHIMP	Class Example		Private	CLASS4	HTML	Excel	Schedule	Favorite
UA_R_TIME_CONVERSION_EXAMPLE	TIME CONVERSION EXAMPLE		Public		HTML	Excel	Schedule	Favorite
UPKR_COPY2_QRY	Example Query for class		Public	CLASS QUERY	HTML	Excel	Schedule	Favorite

3. Click on the **Favorite** link for that query.
   The selected query is listed in a grid with the header **My Favorite Queries**.

   Search Results

   'Folder View: -- All Folders -- ▼

Query					Run to HTML	Run to Excel	Schedule	Add to Favorites
Query Name	**Description**		**Owner**	**Folder**				
UAAH_WHIMP	Class Example		Private	CLASS4	HTML	Excel	Schedule	Favorite
UA_R_TIME_CONVERSION_EXAMPLE	TIME CONVERSION EXAMPLE		Public		HTML	Excel	Schedule	Favorite
UPKR_COPY2_QRY	Example Query for class		Public	CLASS QUERY	HTML	Excel	Schedule	Favorite

   ▼ **My Favorite Queries**

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Remove
UPKR_COPY2_QRY	Example Query for class	Public	CLASS QUERY	HTML	Excel	Schedule	☐

   Clear Favorites List

Steps

4. To review the appearance of this page when there are no search results, click on the **Home** link in the navigation header.

   Select the **path:** Reporting Tools > Query > Query Viewer.

   Query Viewer

   Enter any information you have and click Search. Leave fields blank for a list of all values.

   *Search By: [Query Name ▼]   begins with   [   ]

   [Search]   Advanced Search

My Favorite Queries				Customize | Find |	First ◄ 1 of 1 ► Last	
Query Name	**Description**	**Owner**	**Folder**	**Run to HTML** **Run to Excel**	**Schedule**	**Remove**
UPKR_COPY2_QRY	Example Query for class	Public	CLASS QUERY	HTML Excel	Schedule	☐

   [Clear Favorites List]

5. Click on the Expand/Collapse button ▼ .

   ▼ My Favorite Queries

   The list of favorites is hidden.

   ► My Favorite Queries

   [Clear Favorites List]

6. Click on the Expand/Collapse button ► again to display the list of Favorites.

My Favorite Queries				Customize | Find |	First ◄ 1 of 1 ► Last	
Query Name	**Description**	**Owner**	**Folder**	**Run to HTML** **Run to Excel**	**Schedule**	**Remove**
UPKR_COPY2_QRY	Example Query for class	Public	CLASS QUERY	HTML Excel	Schedule	☐

   [Clear Favorites List]

7. Click on the **Remove** ☐ button to remove the query from the Favorites list.

Lesson 6: Create a Basic Query

Discussion

The Query Viewer can be used only to run queries and download the results. The Query Manager can be used to run queries and download results, as well as to create or modify a query.

The **path** to the Query Manager is:

Reporting Tools > Query > Query Manager

In the Query Manager, follow these steps to create a query:
1. Select the records.
2. Select the fields.
3. Edit field properties.
4. Add field criteria.
5. Add expressions (if applicable).
6. Save the query (optional).
7. Run the query.

The pages available in order of their display:

Page	Comments
Records	Select the records (tables) to be included in the query.
Query	Select the fields to be included in the query. Displays the selected records (tables) in the query and the fields in those records.
Expressions	Optional page that is used to add and edit expressions. Expressions represent a value and consist or at least one operand (such as B.FIRSTNAME or 1.03) and an operator (such as +). Examples: A.ANNUALWAGE * 1.03 C.LAST NAME + ', ' + C.FIRST NAME
Prompts	Displays the prompts you have created. You may edit the prompts. Run-Time prompts allow you to enter a value to satisfy the criterion for a specific field at the time that the query is run. The query results will include only those rows of information that match the value entered at the prompt.
Fields	Displays the selected fields for output in the query. Edit field properties, such as column number, heading text, sort order and aggregate functions. Can delete a field from the query. Can select a field on which to set criteria.

Page	Comments
Criteria	Displays the specific fields and values that will limit the rows of data that are returned. Can select any field (from the records included in the query definition) on which to set criteria. The field does not need to be included in the query results (on the Fields page). Can edit or delete criteria.
Having	Displays the specific fields and values that will limit the data returned when an aggregate function is used. Aggregate functions include Sum, Average, Max, Min and Count. This page was called Having Criteria in version 7.
View SQL	Displays the SQL SELECT statement that Query Manager creates after you create your query on the previous pages.
Run	Asks the question (query) and displays the query results.

Steps 1 and 2: Selecting Records and Fields

Selecting the First Record

Steps
1. Enter the **path** to the Query Manager: **Reporting Tools > Query > Query Manager** and click <u>Create New Query</u> on the Query Manager search page. -OR- If you are working in Query Manager, already, click <u>New Query</u> . The Records tab of the Query Manager displays. The Find an Existing Record edit box displays. ![Records tab screenshot showing Query Name: New Unsaved Query, Find an Existing Record, Search By: Record Name begins with, Search, Advanced Search, Save, Save As, New Query, Preferences, Properties, New Union, Return to Search] Use the Records page to search for the records (tables) that you need.
2. Search for the first record (table) that you need by entering criteria in the Search by row. In class, enter criteria to locate the records with **Record Name begins with STDNT**. The search is not case sensitive. ![Find an Existing Record screenshot: Query Name: New Unsaved Query, Description:, Search By: Record Name begins with STDNT, Search, Advanced Search]
3. Click Search . The records that meet the criterion are displayed in the Search Results area.

Steps

Records	Query	Expressions	Prompts	Fields	Criteria	Having	View SQL	Run

Query Name: New Unsaved Query   **Description:**

Find an Existing Record

*Search By: Record Name ▼   begins with   STDNT

[Search]   Advanced Search

Search Results

The view tools

Record	Customize	Find	View All	⊞ First ◄ 1-20 of 33 ► Last	
Recname	Add Record	Show Fields
STDNT_ADVISOR - Student Advisor	Add Record	Show Fields
STDNT_ADVR_HIST - Student Advisor History	Add Record	Show Fields
STDNT_AGRMNT - Student Agreements	Add Record	Show Fields
STDNT_AGRMNT_CR - Student Agreement Courses	Add Record	Show Fields
STDNT_ATTR_DTL - Student Attribute Table	Add Record	Show Fields
STDNT_ATTR_VAL - Student Attribute Table	Add Record	Show Fields
STDNT_BLOCK_DTL - Student Enrollment Block Dtl	Add Record	Show Fields
STDNT_CAREER - Student Career	Add Record	Show Fields
STDNT_CAREER_VW - Student Career view	Add Record	Show Fields
STDNT_CARTRM_VW - Student Career Term Table View	Add Record	Show Fields
STDNT_CAR_MLSTN - Student Milestone	Add Record	Show Fields
STDNT_CAR_SEQ - Student Career Sequence	Add Record	Show Fields
STDNT_CAR_SRCH - Student Academic Program	Add Record	Show Fields
STDNT_CAR_TERM - Student Career Term Table	Add Record	Show Fields

Click the **Add Record** link for the record you need.

4. In the Search Results, locate the record that you need.

Use the scroll bar to view the results on a page. Use the view tools to move to additional pages of search results.

In class, locate the record:
STDNT_CAR_TERM .

Steps

5. Click on the   Add Record   link for the record to select it.
    The Query page is displayed. The record that you selected is listed and is expanded to show all the fields within it.

Note the instructions available at the top of this page.

Selecting the Fields

Steps
6. Click on the **Folder icon** 🗁 in front of the record name. The record is collapsed. The field names are no longer displayed. Records \ Query \ Expressions \ Prompts \ Fields \ Criteria \ Having \ View SQL \ Run **Query Name:** New Unsaved Query   **Description:** Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab. **Chosen Records** Alias Record ⊞   A STDNT_CAR_TERM - Student Career Term Table   Hierarchy Join ⊟ Save   Save As   New Query   Preferences   Properties   New Union   Return to Search
7. Click again on the **Folder icon** ⊞ in front of the record name. The record is expanded. The field names are displayed.

Steps

8. Select the fields that you want for your query by clicking on the checkbox in front of the field's name.

   In class, select the fields shown in the following screenshot.

Click on the Sort tool to place the field names in ascending alphabetical order.

Each record that you select is assigned an **alias**. The first record is **A**, the second record is **B**, etc.

In class, select five fields.

EmplID
Acad_Career
STRM
Acad_Prog_Primary
Elig_To_Enroll

Saving a Query

In PeopleSoft version 9, you do not need to save your query before you run it.

Although, we are not ready to run the query in class, it is a good idea to save your work periodically.

Steps
1. Scroll to the bottom of the page and click on [Save] . The "Enter a name to save this query" page is displayed.
2. In the *Query Name edit box, you enter a name for the new query.   In class, follow the naming conventions as outlined in Appendix C. Name the query **UXXX_QUERYINTRO**, where XXX are your initials.   This field is required.   The Query Name is uppercase and can be a maximum of 30 characters. Spaces are not permitted. An underscore can be used to separate words or abbreviations within the name. Example: UPKR_ADVISOR_JULY
3. In the **Description** edit box, a brief explanation of the query's purpose can be entered.   In class, enter the description as **Query Class 1** .   This is an optional field.   The Description can be a maximum of 30 characters. Upper and lower case are permitted. Spaces are permitted.
4. In the **Folder** edit box, you may indicate a query folder in which to list this query. A Folder in Query Manager allows you to group queries. When you search for a query, you can ask to see either all queries or just the queries in a particular folder (group).   Enter the name of an existing folder or enter a new name to create a new folder.   Folders are discussed in the Query Advanced class.
5. Only the *Query Type of User is supported at this time. This is a required field that defaults to User.   Do not change the value in this field.

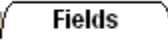| Steps |
|---|
| 6. Click on the down arrow for **Owner** to select either Public or Private.

 In class, select **Private**.

 Review the discussion of Public and Private Queries in Appendix A to ensure you make the appropriate choice. |
| 7. In the **Query Definition** edit box, you may enter a more detailed description of the query than is allowed in the Description property.
 This field is optional.

 The page will look similar to this:

 Enter a name to save this query:

 *Query: `UPKR_QUERYINTRO`
 Description: `Query Class 1`
 Folder:
 *Query Type: `User`
 *Owner: `Private`
 Query Definition:

 [OK]   [Cancel] |
| 8. Click [OK] to save any changes.
 -OR-
 Click [Cancel] if you did not make any changes or do not want to save the changes.

 In class, click [OK] .
 The Query page is displayed and the query is saved.

 Note that the query name and description (if you entered one) are displayed at the top of the page.

 Records \ **Query** \ Expressions \ Prompts \ Fields \ Criteria \ Having \ View SQL \ Run

 Query Name: UPKR_QUERYINTRO   **Description:** Query class 1

 Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.
 Chosen Records
 Alias Record
 📁 A STDNT_CAR_TERM - Student Career Term Table   Hierarchy Join ⊟
 [Check All]   [Uncheck All] |

Step 3: Edit Field Properties

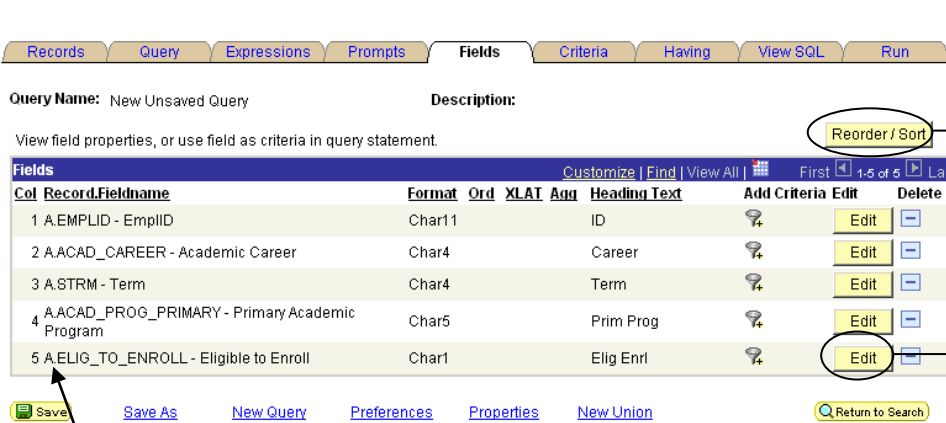On the Fields page, use the **Edit button** `Edit` for a Field to change the field properties of:

- Heading
- Aggregate

On the Fields page, use the **Reorder/Sort button** `Reorder / Sort` to change the field properties of:

- Column Number
- Order By Descending
- New Order By

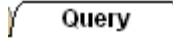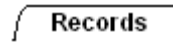| Steps |
|---|
| 1. Click on the `Fields` folder tab.
The Fields page is displayed. |

Use the Reorder/Sort button to change the Column Number, New Order By and Order By Descending properties of a field.

Records	Query	Expressions	Prompts	**Fields**	Criteria	Having	View SQL	Run

Query Name: New Unsaved Query   Description:

View field properties, or use field as criteria in query statement.   Reorder / Sort

Fields					Customize | Find | View All |	First 1-5 of 5 La
Col Record.Fieldname	**Format**	**Ord**	**XLAT**	**Agg**	**Heading Text**	**Add Criteria** **Edit** **Delete**
1 A.EMPLID - EmplID	Char11				ID	Edit
2 A.ACAD_CAREER - Academic Career	Char4				Career	Edit
3 A.STRM - Term	Char4				Term	Edit
4 A.ACAD_PROG_PRIMARY - Primary Academic Program	Char5				Prim Prog	Edit
5 A.ELIG_TO_ENROLL - Eligible to Enroll	Char1				Elig Enrl	Edit

Save   Save As   New Query   Preferences   Properties   New Union   Return to Search

Use the Edit button for a field to change the Heading, or Aggregate properties of the field.

Note that the field names include the alias for the record from which they originate. The fieldnames use the format **Alias.Fieldname**.
Example: A.STRM is the TERM field in the first (and here only) record, STDNT_CAR_TERM .

2. Verify that you have the Fields that you need.
   In class, the Fields page should look like the screenshot shown above.

   To select additional fields from the record already included in the query, click on the `Query` folder tab.

   To include additional records in the query from which to select fields, click on the `Records` folder tab.

Steps

3. Review the column labeled "Heading Text." These are the labels that will appear at the top of each column in the query results.

    Change the **Heading Text** for field 4, A.ACAD_PROG_PRIMARY.

    a. Click [Edit] for that field.
    b. On the Edit Field Properties page, edit the Heading Text field by selecting the **RFT Long** option.

Edit Field Properties

Field Name: A.ACAD_PROG_PRIMARY - Primary Academic Program

Heading
- ○ No Heading   ○ RFT Short
- ○ Text   ⦿ RFT Long

Heading Text:
Prim Prog

Unique Field Name:
A.ACAD_PROG_PRIMARY

[OK] [Cancel]

Aggregate
- ⦿ None
- ○ Sum
- ○ Count
- ○ Min
- ○ Max
- ○ Average

The Heading box offers four choices:
- No heading
- Text – Displays any text you enter in the Heading Text edit box.
- RFT Short – Displays the Record Field Table short name.
- RFT Long – Displays the Record Field Table long name.

You may select the text option and then, enter the text of your choice in the **Heading Text** edit box.

c. Click [OK].

    The Fields page is displayed with your changes.

| Records | Query | Expressions | Prompts | Fields | Criteria | Having | View SQL | Run |

Query Name: UPKR_QUERYINTRO   **Description:** Query Class 1

View field properties, or use field as criteria in query statement.   [Reorder / Sort]

Fields   Customize | Find | View All | 🏢   First ◀ 1-5 of 5 ▶ Last

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.EMPLID - EmplID	Char11				ID	🔍	Edit	⊟
2	A.ACAD_CAREER - Academic Career	Char4				Career	🔍	Edit	⊟
3	A.STRM - Term	Char4				Term	🔍	Edit	⊟
4	A.ACAD_PROG_PRIMARY - Primary Academic Program	Char5				Primary Academic Program	🔍	Edit	⊟
5	A.ELIG_TO_ENROLL - Eligible to Enroll	Char1				Elig Enr	🔍	Edit	⊟

The Heading Text for column 4 is now Primary Academic Program.

[💾 Save]   Save As   New Query   Preferences   Properties   New Union   [🔍 Return to Search]

Steps

4. Change the **column number** of field number 3, A.STRM.
    a. Click [Reorder / Sort] .
        Note the instructions at the top of the Edit Field Ordering page.
    b. On the Edit Field Ordering page, enter a **2** in the New Column edit box for A.STRM.

5. Sort the rows in the query results by A. ACAD_PROG_PRIMARY and then by A.EMPLID.
    a. In the **New Order By** column, enter a **1** in the Acad_Prog_Primary field. This will sort the results by the value in this field.
    b. Enter a **2** in the A.Emplid field. This will sort the rows with the same Acad_Prog_Primary value by the Emplid value.
    c. Click [OK] .

Edit Field Ordering

Reorder columns by entering column numbers on the left. Columns left blank or assigned a 0 will be automatically assigned a number. Change the order by number by entering numbers on the right. To remove an order by number, leave the field blank or enter a 0.

Note the instructions.

By default, the sort will be Ascending. Click to mark the Descending checkbox, if necessary.

Edit Field Ordering			Customize | Find | View All | ▦ First ◀ 1-5 of 5 ▶ Last		
New Column	Column	Record.Fieldname	Order By Descending	New Order By
		1 A.EMPLID - EmplID	☐	2
		2 A.ACAD_CAREER - Academic Career	☐	
2		3 A.STRM - Term	☐	
		4 A.ACAD_PROG_PRIMARY - Primary Academic Program	☐	1
		5 A.ELIG_TO_ENROLL - Eligible to Enroll	☐	

[OK]   [Cancel]

6. Review the Fields page to see the changes in Field Properties.
    *   The STRM field is now column 2.
    *   Review the **Ord** property. The rows in the query results will be sorted first by ACAD_PROG_PRIMARY and then by EMPLID.

| Records | Query | Expressions | Prompts | Fields | Criteria | Having | View SQL | Run |

Query Name: UPKR_QUERYINTRO   **Description:** Query Class 1

View field properties, or use field as criteria in query statement.   [Reorder / Sort]

Fields					Customize | Find | View All | ▦ First ◀ 1-5 of 5 ▶ Last			
Col Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1 A.EMPLID - EmplID	Char1	2			ID	🔍	[Edit]	□
2 A.STRM - Term	Char4				Term	🔍	[Edit]	□
3 A.ACAD_CAREER - Academic Career	Char4				Career	🔍	[Edit]	□
4 A.ACAD_PROG_PRIMARY - Primary Academic Program	Char5	1			Primary Academic Program	🔍	[Edit]	□
5 A.ELIG_TO_ENROLL - Eligible to Enroll	Char1				Elig Enrl	🔍	[Edit]	□

[Save]   Save As   New Query   Preferences   Properties   New Union   [Return to Search]

7. Click on [Save] to save your changes.

Step 4: Add Field Criteria

In this part of the lesson, you will restrict the results to Undergraduate students for a particular group of Primary Academic Programs who are eligible to enroll in the 2008 Fall term.

To add criteria for a field that is listed on the Fields page, click on the Add Criteria tool for that field.

Setting Constant Criteria from the Fields Page

Steps
1. Create a criterion for the A.ACAD_CAREER field.

    a. Click on the Add Criteria tool   for that field.

    b. Leave the default Expression 1 Type of **Field**.

    c. The selected field's name appears in the Expression 1 box.

    d. In the Condition Type, make a selection at the down arrow.

        In class, select **equal to**.

    e. Leave the default Expression 2 Type of **Constant**.

    f. In the Expression 2 edit box, type **UGRD**. (This field value is case sensitive so use upper case.)

    g. Read the criterion to be sure it is correct.

        Field A.ACAD_CAREER equal to Constant UGRD

    h. Click   OK .

        After you click OK, the Fields page is displayed.

Steps

2. Create a criterion for the A.STRM field.

   a. Click on the Add Criteria tool [icon] for that field.
   b. Leave the default Expression 1 Type of **Field**.
   c. The selected field's name appears in the Expression 1 box.
   d. In the Condition Type, make a selection at the down arrow.

      In class, select **equal to**.
   e. Leave the default Expression 2 Type of **Constant**.
   f. In the Expression 2 edit box, type **4087**.
   g. Read the criterion to be sure it is correct.

      Field A.STRM equal to Constant 4087

   Edit Criteria Properties

Choose Expression 1 Type	Expression 1
⦿ Field	**Choose Record and Field**
○ Expression	Record Alias.Fieldname:
	🔍 A.STRM - Term

   'Condition Type: | equal to ▼ |

Choose Expression 2 Type	Expression 2
○ Field	**Define Constant**
○ Expression	Constant: 4087 🔍
⦿ Constant	
○ Prompt	
○ Subquery	

   OK   Cancel

   h. Click [OK] .

      After you click OK, the Fields page is displayed.

Steps

3. Create a criterion for the A.ACAD_PROG_PRIMARY field.

   a. Click on the Add Criteria tool [icon] for that field.
   b. Leave the default Expression 1 Type of **Field**.
   c. The field A.ACAD_PROG_PRIMARY appears in the Expression 1 box.
   d. Select the Condition Type of **like**. (For a list of Condition Types, see Note 2 after this step.)
   e. Select an Expression 2 Type of **Constant**.
   f. Enter the text for the criterion in the Expression 2 edit box.

      In class, type **FAA%** . In PeopleSoft, the percent sign, %, is a wildcard meaning "any characters here."
      (This is a case sensitive field, so type in upper case.)
   g. Read the criterion to be sure it is correct.

      Field A.ACAD_PROG_PRIMARY like Constant FAA%

      Edit Criteria Properties

      Choose Expression 1 Type
      ⦿ Field
      ○ Expression

      Expression 1
      Choose Record and Field
      Record Alias.Fieldname:
      🔍 A.ACAD_PROG_PRIMARY - Primary

      *Condition Type: [like ▾]

      Choose Expression 2 Type
      ⦿ Constant
      ○ Prompt

      Expression 2
      Define Constant
      Constant: FAA% 🔍

      [OK]   [Cancel]

      > **Like** is used when the value in Expression 2 is not an exact match. Whenever you use a wildcard like %, use Like.

      FAA% will include the rows for students with any primary academic program code that begins with FAA (Fine and Applied Arts).

   h. Click [OK] .

Steps

4. Create a criterion for the A.ELIG_TO_ENROLL field.

    a. Click on the Add Criteria tool 🕇 for that field.
    b. Leave the default Expression 1 Type of **Field**.
    c. The field A.ELIG_TO_ENROLL appears in the Expression 1 box.
    d. Select the Condition Type of **equal to**.
    e. Select an Expression 2 Type of **Constant**.
    f. Enter the text for the criterion in the Expression 2 edit box.

    In class, use the Lookup tool 🔍 to find the valid value that you need.

    Click on its Select Constant link. In class, select **Y**.

    Select A Constant

Values		Customize	Find	View All	▦ First ◀ 1-2 of 2 ▶ Last	
Field Value	**Translate Long Name**	**Translate Short Name**	**Select Constant**
N	No	No	Select Constant
Y	Yes	Yes	Select Constant

    Cancel

    g. On the Edit Criteria Properties page, click OK .
    h. Read the criterion to be sure it is correct.

    Field A.ELIG_TO_ENROLL equal to Constant Y

    Edit Criteria Properties

Choose Expression 1 Type	Expression 1
⦿ Field	Choose Record and Field
○ Expression	**Record Alias.Fieldname:**
	🔍 A.ELIG_TO_ENROLL - Eligible to

    *Condition Type: equal to

Choose Expression 2 Type	Expression 2
○ Field	Define Constant
○ Expression	
⦿ Constant	Constant: Y 🔍
○ Prompt	
○ Subquery	

    OK   Cancel

    i. Click OK .

NOTE 1 - Using Wildcards

The available wildcards are % and _ .

- ◘ The **percent sign**, **%,** means "any characters here." For example, 61% would return field values that begin with 61 and are followed by no or any number of characters. %61 would return field values that contain 61 anywhere within the value, at the beginning, in the middle or at the end.

- ◘ The **underscore character**, _, means "any one character here." You may use more than one underscore in an expression. For example, 6_00 would return field values that were 4 characters in length, begin with a 6, then any character and end with 00. 6__0 (6, two underscores, 0) would return field values that are 4 characters in length, begin with a 6, then any two characters and end with 0.

NOTE 2 – Condition Types (Operators)

The Condition Type is the logical operator that tells Query Manager how to compare the Expression 1 to the Expression 2. This record provides information about the available Condition Types.

In this lesson's example, the criterion reads: A.ACAD_PROG_PRIMARY like FAA% . The Condition Type is **like** and the Expression 2 Type (for FAA%) is **constant** (with wildcard).

Condition Type (Operator)	Expression 2 Type[1]	Description
equal to not equal to greater than not greater than less than not less than	constant field expression prompt	
in list not in list	list	Use this operator if you have a field that could be equal to a number of different values. For example, if you want to find all students from OH, CA, and NY, use the **In List** operator. If you want to omit students who live in OH, CA, and NY, use **not in list**.
between not between	constant - constant constant - field constant - expression field - constant field - field field - expression expression - constant expression - field expression - expression	Use **between** when you need to select fields having a value that is between two specified values. For example, if you want to locate all the rows dated from 2001-10-01 through 2001-10-31, use the between operator and specify the beginning and ending dates as values. Between is inclusive, so rows of data with the beginning and ending dates will be included in the results.
like not like	constant (with wild cards) prompt	The wildcard character **%** (percent sign) is used for any string of zero or more characters. For example, S% finds any string beginning with the letter S. The wildcard character _ (underscore) is used for a single character. For example "_ones**" will find any string of five characters ending with "ones" - such as Jones and Cones.
is null is not null		IS NULL checks for fields that have NO values. (Zero is a value.) Null fields have no data.
in tree not in tree	tree option	

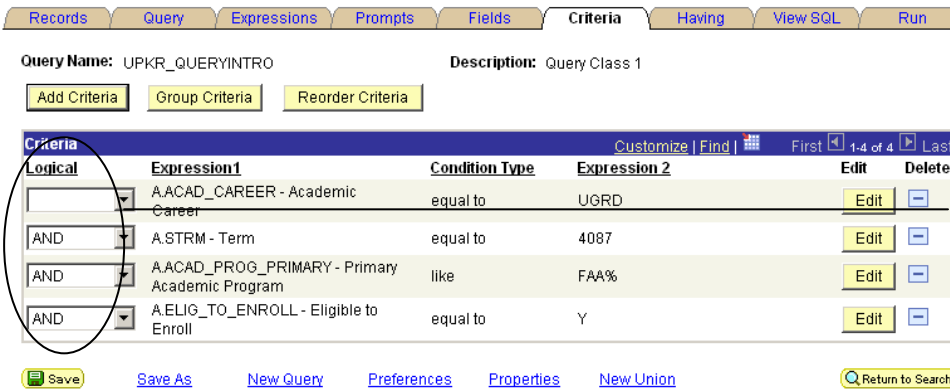[1] The Expression 2 Type of sub query has not been included in this list.

Review/Edit the Criteria on the Criteria Page

You have reviewed setting criteria on the Fields page, based on the fields selected for the query results.

In this part of the lesson, you review the criteria that you have set and how to edit those criteria.

Steps

1. Click on the [**Criteria**] folder tab.
   The Criteria page is displayed.

| Records | Query | Expressions | Prompts | Fields | Criteria | Having | View SQL | Run |

Query Name: UPKR_QUERYINTRO   Description: Query Class 1

[Add Criteria]   [Group Criteria]   [Reorder Criteria]

Criteria   Customize | Find | First ◄ 1-4 of 4 ► Last

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.ACAD_CAREER - Academic Career	equal to	UGRD	Edit	–
AND	A.STRM - Term	equal to	4087	Edit	–
AND	A.ACAD_PROG_PRIMARY - Primary Academic Program	like	FAA%	Edit	–
AND	A.ELIG_TO_ENROLL - Eligible to Enroll	equal to	Y	Edit	–

[Save]   Save As   New Query   Preferences   Properties   New Union   [Return to Search]

For this query, the **logical** operator AND is used. When the query is run, only the rows that meet all 4 of the criteria will be returned.

2. Review the criteria to determine if they are correct.

   To revise/edit a criterion, click on its [Edit] .

   To delete a criterion, click on its [–] .

Steps 5, 6 and 7

Step 5 is to add expressions. This is not covered in the Query Introduction class.
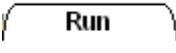
In step 6, you save the query. If you need complete instructions for saving a query, refer to Lesson 4. In class, you have saved your query. You only need to save the changes.

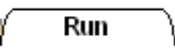Click [Save] to save the changes to the query definition.

When the query definition is complete and the query is saved, perform step 7, run the query, as outlined in the next lesson.

Lesson 7: Running a Query

Discussion

To run the query, click on the `Run` folder tab.

A query also may be run from the Query Viewer or Query Manager basic or advanced search page. Search for the query, locate it in the search results and click on its `HTML` or `Excel` link.

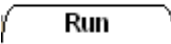When you click on `Run` or `HTML` or `Excel`, one of three events will occur:

1. A new, separate browser window opens; the query runs and the preview results are displayed.
2. A new, separate Excel window opens and the results are displayed in an Excel worksheet.
3. A new, separate report window opens with the prompts displayed and a button `View Results`. In this event, you would enter your criteria at the prompts and click `View Results` to run the query and display the results.

When the results of the query are displayed in a separate browser window, the number of rows returned is noted in a header bar. This page is meant as a preview page. To review your data, select one of the export options, which appear as links on the page. Unless the query results consist of a small number of rows, the **View All** link is not the method to review your data.

Steps

1. <u>If you are on the Query Viewer or Query Manager basic or advanced search page</u>, click on either the HTML link or the Excel link for the query you need in the Search Results.
   -OR-

   <u>If the query is open</u>, click on the ⌐ Run ⌐ folder tab in the Query Manager.

2. If prompts are displayed, enter your criteria and click View Results .

   UPKR_QRYCLASS - for query class

   Term: [ ] 🔍
   View Results

	ID	Name	Career	Term

   The query runs and the preview results are displayed in the browser or in Excel, depending on what you selected.

UPKR_QUERYINTRO- Query Class 1

Download results in (Excel SpreadSheet   CSV Text File)(199 kb)

Select one of these export options to save and view the query results.

View All   First ◀ 1-100 of 3331 ▶ Last

	ID	Term	Career	Primary Academic Program	Elig Enrl
1	10364	4087	UGRD	FAAU	Y
2	1133225	4087	UGRD	FAAU	Y
3	1133226	4087	UGRD	FAAU	Y
4	1133230	4087	UGRD	FAAU	Y
5	1133589	4087	UGRD	FAAU	Y
6	1133774	4087	UGRD	FAAU	Y
7	1133835	4087	UGRD	FAAU	Y

The Excel file may open in Internet Explorer, rather than opening in Excel. In Appendix D, see the instructions labeled "Configuring the Internet Explorer." These instructions are for changing the settings on your computer so that the files will open in the appropriate program.

---

3. See Lesson 4 for instructions to view, print and save the query results.

# Lesson 8: View and Edit Query Properties

Discussion

The following items are considered Query Properties:

- Query (Name)
- Description
- Folder
- Query Type
- Owner
- Distinct
- Query Definition
- Last Updated Date/Time (read only)
- Last Update User ID (read only)

To review or change any of the query properties:

Open the query to change (by clicking on its Edit link on the Query Manager basic or

advanced search page) and click on the Properties link that appears at the bottom of
most of the pages in the Query Manager component.

The query properties may be changed at any time with the exception of the read only
properties of Last Updated Date/Time and Last Update User ID, which are for your
information only. To save the changes on the Query Properties page, click OK on the

page and then Save on the Query Manager pages.

Steps

1.   Enter the **path** to the Query Manager:
 	
     Reporting Tools > Query > Query Manager
 	
     The Query Manager basic search page is displayed.
 	
Query Manager
Enter any information you have and click Search. Leave fields blank for a list of all values.
Find an Existing Query | Create New Query
 	
*Search By: Query Name   ▼   begins with   [   ]
[Search]   Advanced Search
 	
Find an Existing Query | Create New Query

2.   Select the criteria to locate the query you need.   (See Lesson 2 for detailed instructions.)
3.   Click [Search] .   The queries that match your criteria are displayed in the Search Results at the bottom of the page.
4.   Click on the Edit link of the query that you need to open.   The Fields page is displayed.

5.   Click on the Properties link at the bottom of the page.
     The Query Properties page is displayed.
     Use this page to view or change the properties.

Steps

Query Properties

*Query:	UPKR_QUERYINTRO
Description:	Query Class 1
Folder:	
*Query Type:	User
*Owner:	Private ☐ Distinct

Query Definition:

Last Updated Date/Time:	12/23/2008 3:00:26PM
Last Update User ID:	TRAIN01

OK   Cancel

---

6. In the ***Query Name** edit box, you may review an existing query's name or change its name. When you save this change, the original query remains with the original name and a copy is created with the new name.
This field is required.

The Query Name is uppercase and can be a maximum of 30 characters. Spaces are not permitted. An underscore can be used to separate words or abbreviations within the name. Example: UPKR_ADVISOR_JULY

Each query must have a unique name.

---

7. In the **Description** edit box, a brief explanation of the query's purpose can be entered.
This is an optional field.

The Description can be a maximum of 30 characters. Upper and lower case are permitted. Spaces are permitted.

---

8. Only the ***Query Type** of User is supported at this time.
This is a required field that defaults to User.

Do not change the value in this field.

---

9. Click on the down arrow for **Owner** to select either Public or Private.
Review the discussion of Public and Private Queries, in Appendix A, to ensure you make the appropriate choice.

Steps

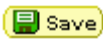| |
|---|
| 10. If you want to use the **Distinct** property, click to mark its checkbox. This field is optional.

 Selecting the Distinct property will eliminate duplicate rows of data from the query results. Some queries will return the same row more than once because it satisfies the query in more than one case.

 For example, if you select the Distinct property and two rows contain exactly the same data, only one row will appear in the query results.

 It will take longer for a query to run if you use the Distinct property. |
| 11. In the **Query Definition** edit box, you may enter a more detailed description of the query than is allowed in the Description property. This field is optional. |
| 12. The **Last Updated Date/Time** property indicates the date and time that the query definition was last saved. This field is read only. It cannot be modified by the user. |
| 13. The **Last Update User ID** property indicates the name of the last user to save the query definition. This field is read only. It cannot be modified by the user. |
| 14. Click ⬜ OK ⬜ if you made any changes.

 Click 🖫 Save to save the changes. -OR-
 Click Cancel if you did not make any changes.

 The Fields page is displayed. |

Lesson 9: View the SQL Page

The eighth page of the Query Manager component is named **View SQL**. SQL is an acronym for Structured Query Language. SQL is the programming language in which PeopleSoft's Query Manager writes your query. You create a query by example. In other words, you select the records and fields, the field properties and criteria. From your choices, the Query Manager writes a computer program that will locate the data you requested.

Reviewing the program on the SQL page is one way to check for your errors.

Steps

1. With a query open to its definition, click on the ⌐ **View SQL** ⌐ folder tab. The View SQL page is displayed.

Records	Query	Expressions	Prompts	Fields	Criteria	Having	View SQL	Run

Query Name: UPKR_QUERYINTRO   **Description:** Query Class 1

Query SQL:
```
SELECT A.EMPLID, A.STRM, A.ACAD_CAREER, A.ACAD_PROG_PRIMARY, A.ELIG_TO_ENROLL
  FROM PS_STDNT_CAR_TERM A
  WHERE A.ACAD_CAREER = 'UGRD'
    AND A.STRM = '4087'
    AND A.ACAD_PROG_PRIMARY LIKE 'FAA%'
    AND A.ELIG_TO_ENROLL = 'Y'
  ORDER BY 4, 1
```

📄 Save   Save As   New Query   Preferences   Properties   New Union   🔍 Return to Search

2. Review the SQL statements to check for errors in your query definition.
3. Return to the appropriate page of the Query Manager component if you want to make changes to the query definition.

Appendix A: Public and Private Queries

When you save a query, you need to decide whether the query will be a Public or a Private query. Here are some items to consider.

Public Queries

- It may be used by anyone with the appropriate security.

- If you want to use someone else's public query and make changes to it, make a copy for yourself, first. Then, modify only your own queries.

- Each query must have a unique name.

- Follow naming conventions, as outlined in Appendix C.

- If you save a query as a Public query, save a Private copy for yourself. This is helpful if the Public query is damaged or modified accidentally.

- You must have security to the records that are used in a query in order to see the results. If you run a query and receive no results, one reason may be that you do not have security to view the data.

Private Queries

- It may be used only by the individual who created it.

- In search results on the Find an Existing Query page, your private queries will be listed first. Only you will see your private queries.

Appendix B: Standard Query List for Student Administration

At The University of Akron, there are some frequently-asked questions of the PeopleSoft Student Administration data that are memorized as queries. In many circumstances, the query you need is in this list.

Query Name	Description	Prompts	Examples
UA_R_EMPLID_FROM_UANET_ID	Get EMPLID for a UAnet ID	Email	rodehav@uakron.edu (case sensitive)
UA_UNIV_ADVISERS	Adviser List with email	Academic Program	BUSU, A&SU, EDUCU, ENGRU
UA_UNIV_ADVISERS_NAME	Adviser List by Acad Plan	Term Career Academic Plan Like	4053 UGRD 3%
UA_UNIV_COURSES_TAUGHT	Fall Class Sections	Subject area	5%
UA_UNIV_DEANS_LIST_MAILING	Dean's List	Institution Academic Career Academic Group Term	Akron UGRD A&S 4047
UA_UNIV_ENROLLED	Enrolled by Academic Program	Academic Program	BUSU, A&SU, EDUCU, ENGRU
UA_UNIV_GRAD_ACAD_STANDING	Graduate School Academic Standing	None	
UA_UNIV_HONORS	Honors	Academic Program	BUSU, A&SU, EDUCU, ENGRU
UA_UNIV_MAJORS	Choose Major by Academic Plan	Academic Plan	3%
UA_UNIV_ROSTER_INFO	Class Rosters	Term Class Number	4047 76444, 72437
UA_UNIV_SCH_ACAD_GROUP	Student Credit Hours by Academic Group	Academic Group	BUS, C&T, A&S

Appendix C: Naming Conventions

When saving a query, if public is NOT selected, you will be the only person who can open or run this query.

If public is selected, any user who has security access to the Query tool can open, modify, delete and run the query.

General guidelines to be used:

1.   Save as public only those queries you anticipate sharing with others. Use Save As to make a private copy of the query for you. This private copy will ensure that you can replace the public copy if someone damages it.

2.   All public queries should be saved using the following format:

   ➢ All public queries must begin with a "U" this denotes a University of Akron query as opposed to a NEOUCOM or system-delivered report.

   ➢ The second, third and fourth characters must be your initials.

   ➢ The last characters are the user's choice.

   ➢ Each user is responsible for maintaining an individual log of queries.

   EXAMPLE: John J. Doe's public query could be "UJJD_ENR_STDNT".

3.   Be respectful of others. Do not copy (save as), modify or run a query that does not belong to you without the permission of the author.

Appendix D: Configuring the Internet Explorer

Discussion

In order for the proper functioning of PeopleSoft reporting and downloading, follow these instructions to:

- Configure for Excel Files
- Set Pop-up Blocker

Configure for Excel Files

When you click on a link to a Microsoft Office file from within Internet Explorer, the file may open in Internet Explorer, rather than opening in the appropriate Office program. These instructions walk through the process of changing your settings so that the files will open in the appropriate program.

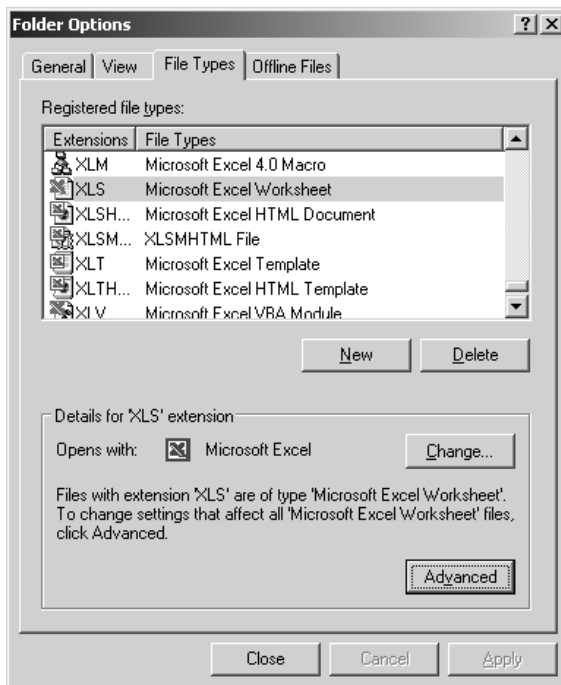| Steps |
|-------|
| 1. Open My Computer by double clicking on the **My Computer** icon on the desktop. |
| 2. From the menu bar select **Tools**, **Folder Options.** |
| 3. Click on the **File Types** tab. |
| 4. In the **Registered file types** list, click the specific Office document type (for example, **XLS** for a Microsoft Excel Worksheet (or, it may read, Microsoft Office Excel 97-2003 Worksheet). It will be near the bottom of the list.
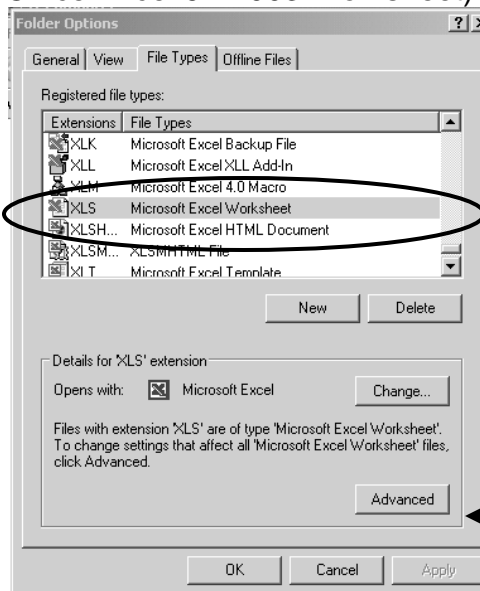
Then, click on the **Advanced** button. |

Steps

5. In the **Edit File Type** dialog box, click to clear the **Browse in same window** check box (or click to clear the **Open Web documents in place** check box). Also, clear the **Confirm open after download** check box.
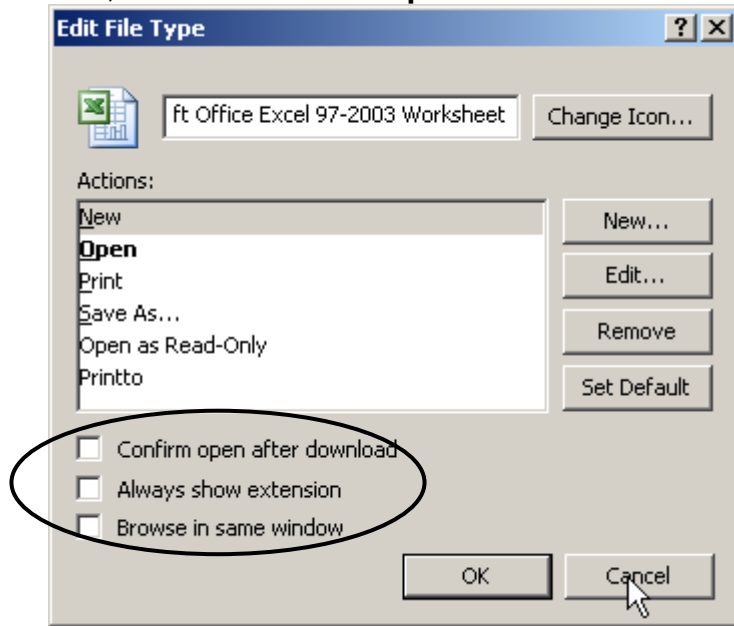
Click on the **OK** button. The Folder Options dialog box displays.

Steps

6. Complete Steps 4-5 for the following file types:
    • **XLA**
    • **XLB**
    • **CSV**
 	
 NOTE: If you are using Office 2007, you need to follow steps 4-5 for the following file types as well: **XLSX** and **XLAM**.

7. Click on the **OK** button.
8. In the My Computer Window, click on the **Close** button.

Configure Pop-Up Blocker

Most computers on campus are set up to block pop-up windows from appearing and this can interfere with your ability to work with many PeopleSoft pages and reports because PeopleSoft uses pop-ups to present information. Therefore, you will need to adjust the setting for the Pop-up Blocker in Internet Explorer so that you can use PeopleSoft without having pages blocked.
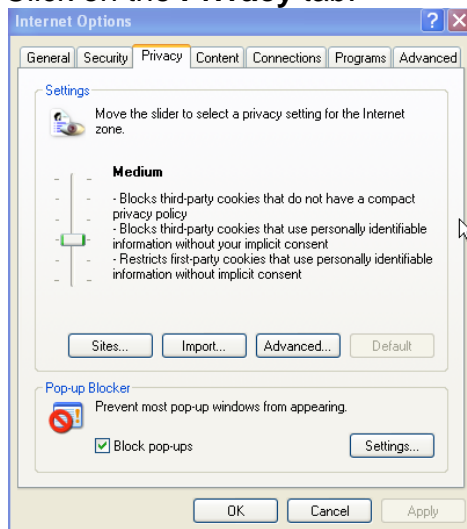
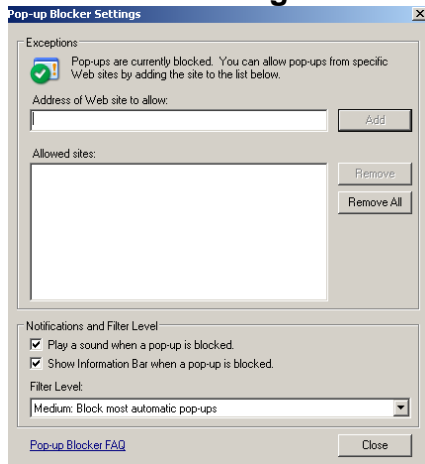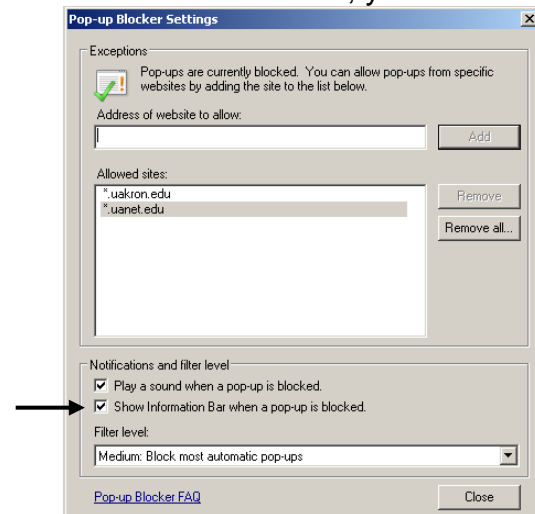| Steps |
|---|
| 1. From within Internet Explorer select **Tools**, **Internet Options**.

Note: If you are using Internet Explorer 7, you can click on the **Tools** icon and then select Internet Options. |
| 2. Click on the **Privacy** tab.

The **Block pop-ups** option should be selected. |

Steps
3. Click on the **Settings** button.
4. In the **Address of Web site to allow** field, enter: **uakron.edu**
5. Click on the **Add** button.
6. Enter **uanet.edu** in the **Address of Web site to allow** field and click on the **Add** button.
7. Under Allowed Sites, you should see *.uakron.edu and *uanet.edu.
8. Verify that the checkbox for **Show Information Bar when a pop-up is blocked** is selected.
9. Click on the **Close** button. Click on the **OK** button.