Santa Clara University

Office of the Registrar

Introduction to PeopleSoft Reporting Tools – Query

Getting Started

In order to run or create queries, you must have the proper security access. In order to obtain this, we require that you receive basic PeopleSoft training in the student administration module. You should have all met with Adora Hoose, our senior technical analyst, and walked through the basic use of PeopleSoft. This class is basic first level training in the use of the PeopleSoft query tool. You will learn how to access the query tool, run to EXCEL, answer prompts for variables and download the results. After successful completion of this class you will be given the ability to run queries.

Terminology

PeopleSoft is a ***relational database***. Relational databases link related data across tables for a more complete picture. We use the student administration module to house all student data. A *module* is a term used to describe a separate unit of software or hardware that can operate and be tested individually without need of other components. PeopleSoft has separate modules for financials and human resources.

The following are laymen's terms and are designed for non-technical users.

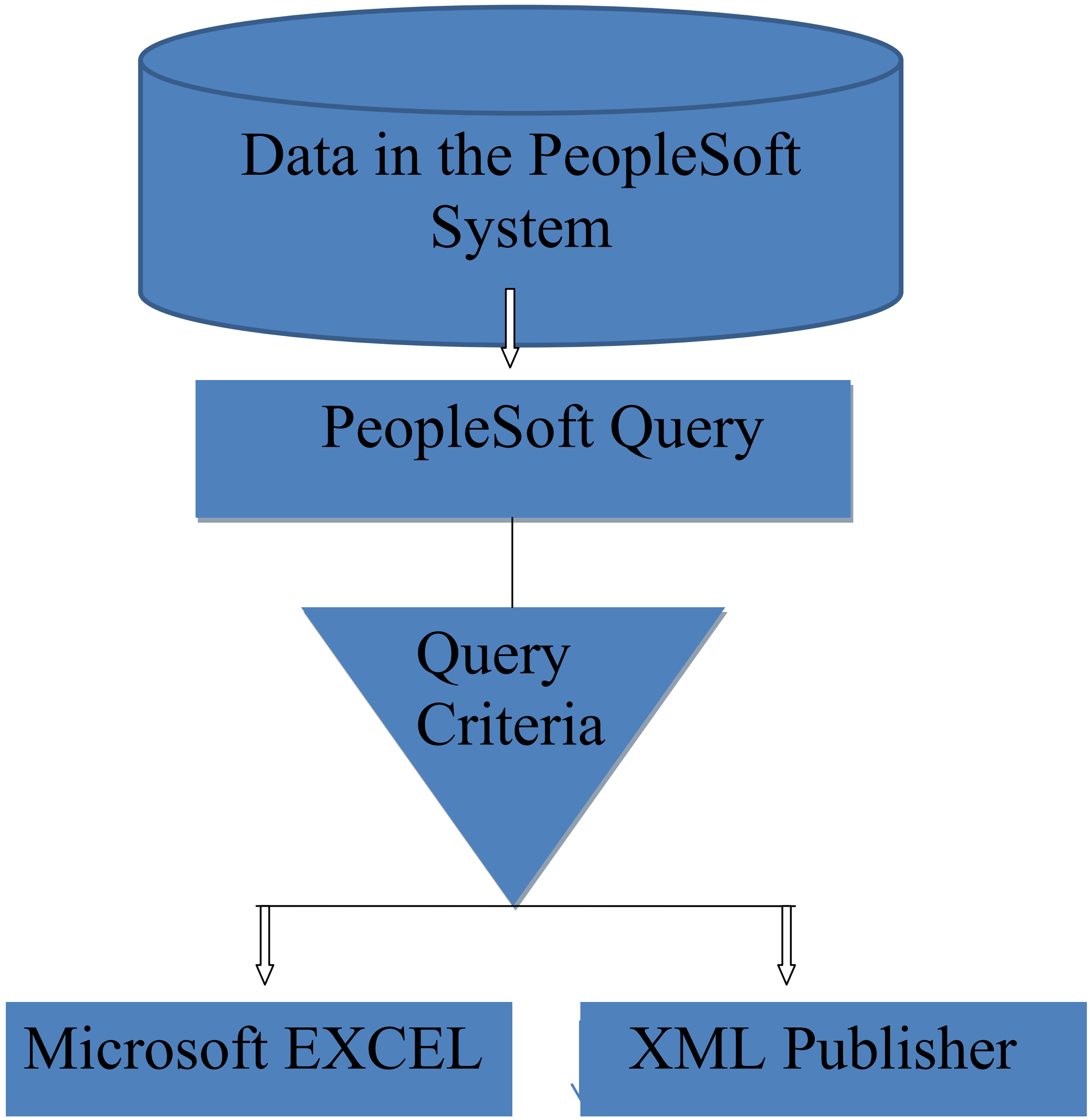
Field: A single data item. (Examples: first name, zip code)
Record: A group of fields. (Example: a personal data record that contains all of the data items for one person: first name, last name, SSN, City, State, zip, etc.)
Table: The main component of a database. A *table* is a set of records. (For example, there may be an employee table that contains all of the personal data records.)
Database: USUALLY a collection of tables – but may be a single table.
Query: A query is a question that is asked about a set of data. The question usually eliminates some data from the "answer" or result. For example, when given a list of people a query may be used to list only those people who live in a specific state or city.
Run: This is the term used for when the query is applied against the tables of information or "executed" in order to create an answer.
Dataset: The result of running a query.

Note that at Santa Clara University, PeopleSoft data is replicated and housed in a separate database. This is to protect the main PeopleSoft database. When you run a query you are actually running it against that replicated database. We refer to this database as the " CSRPT" database. There is a 5 minute delay from when information is entered into PeopleSoft to when it will show up in your query results. If you log back into PeopleSoft after running a query and receive an error message refresh your browser.

The saying" garbage in, garbage out" applies. You have "read only" access to PeopleSoft. The Office of the Registrar is responsible for entering accurate data into the database. Data quality is very important to us so we have checks and balances in place to ensure our data is accurate.

Conceptual Overview – How does it work?

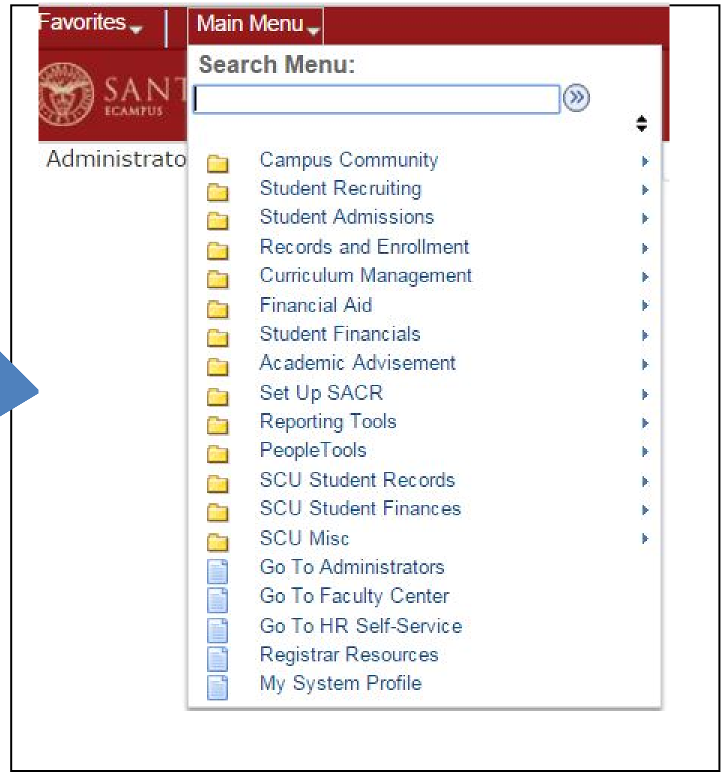
Query inquires upon the data stored in the PeopleSoft system, generates a set of data, and makes the data available within PS Query or other reporting tools.



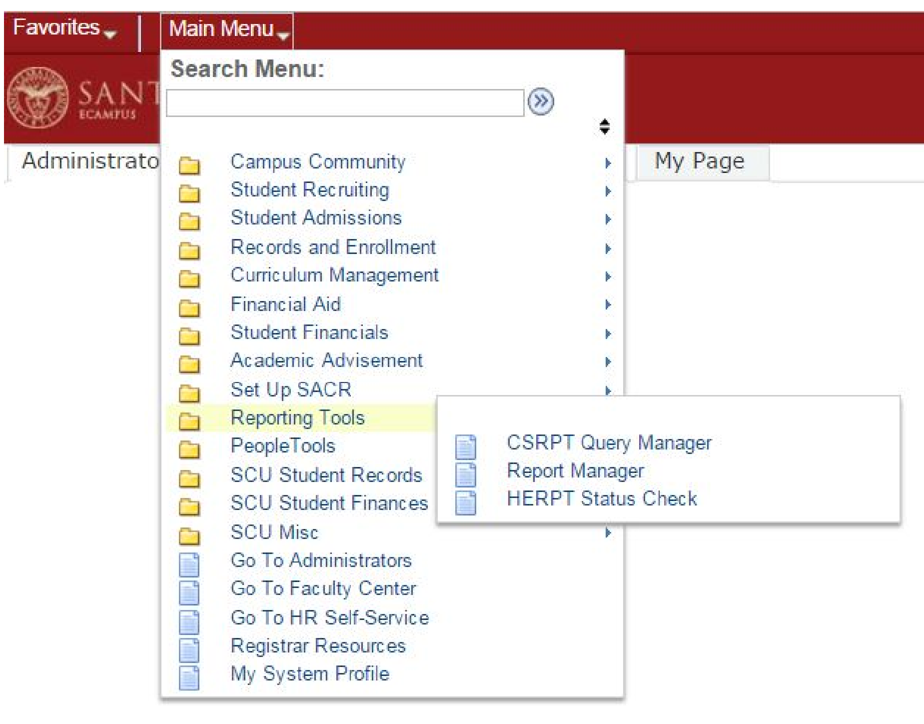
Accessing the Query Tool

1. Log into PeopleSoft via eCampus (https://ecampus.scu.edu/psp/csprd90/?cmd=login)

2. Click on Reporting Tools



3. Click on CSRPT Query Manager

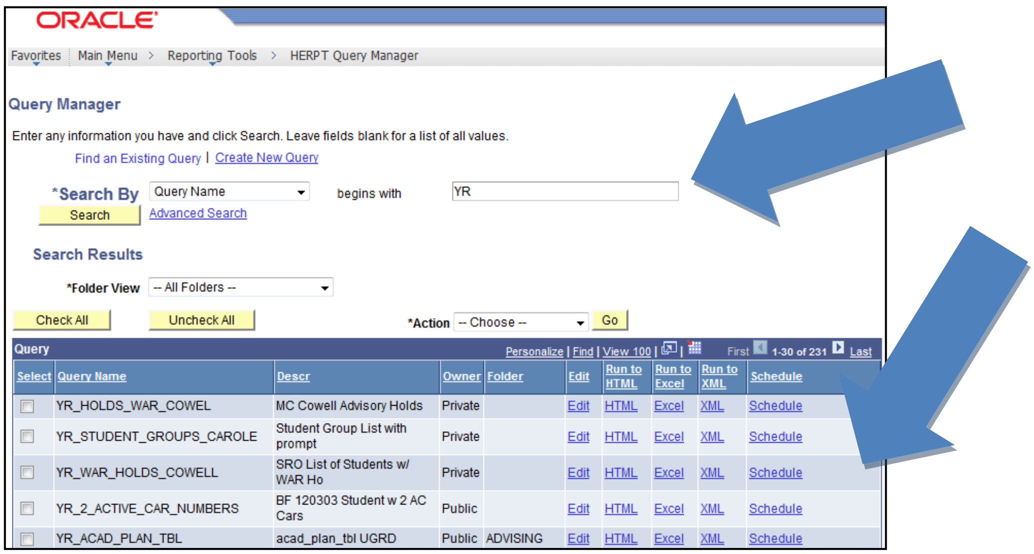


Query Ownership

Public Queries

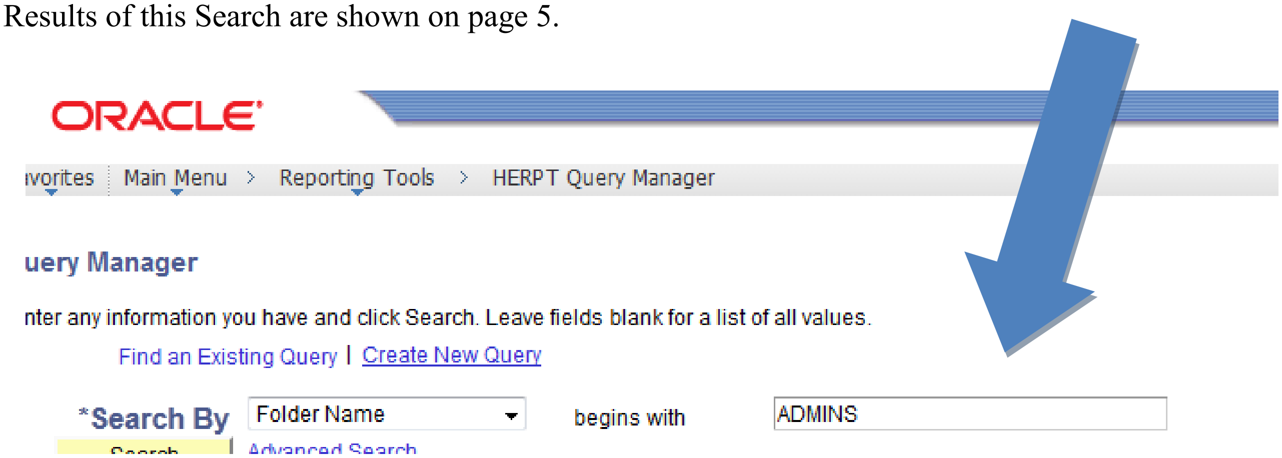
Public Queries are available to all users **who have query access. Any user with access to the records used by the query can run the query.** Your public query list is controlled by the PeopleSoft security level assigned to you. For example, if you don't have security to see grade information, none of the public queries that contain grades will be in your list.

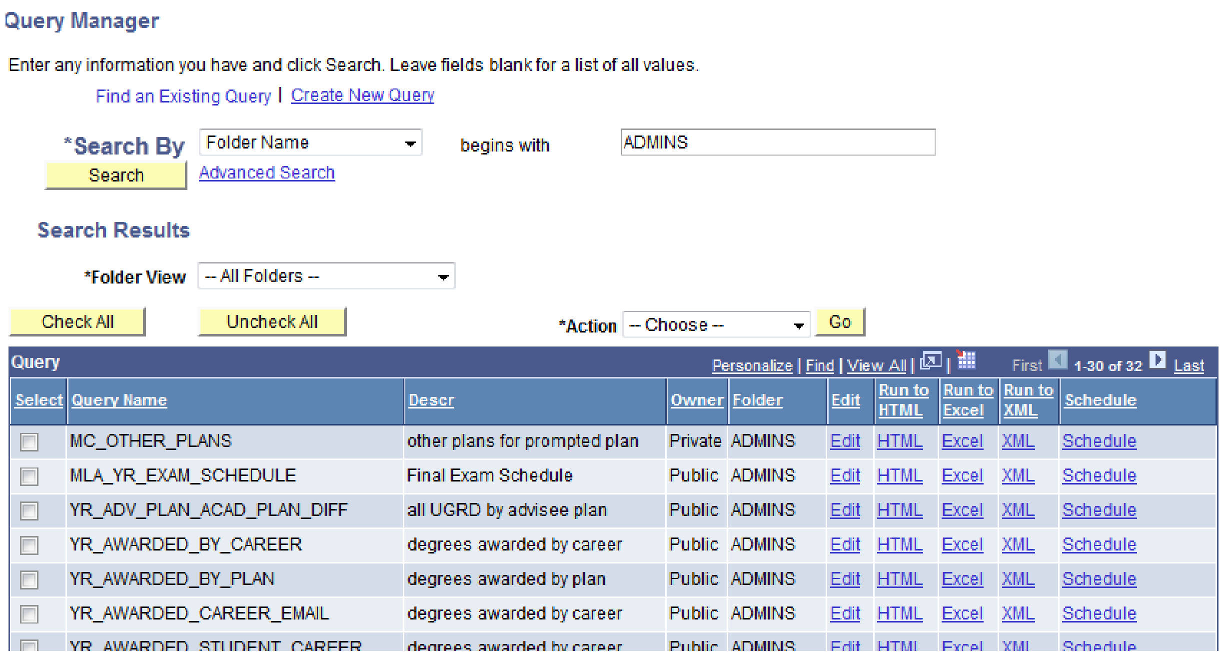
Many public queries exist in the reporting database (CSRPT). Each of these queries starts with the letters YR. After you have logged into CSRPT you can see a list of public queries that you can run by entering YR in the appropriate box and clicking the Search button.



Another option would be to search by folders. Using the drop down menu next to the "Search By" field you can choose "Folder Name" to search for a specific folder.

Below shows a folder called "ADMINS". This folder contains YR queries that are used a lot by AAs. Results of this Search are shown on page 5.





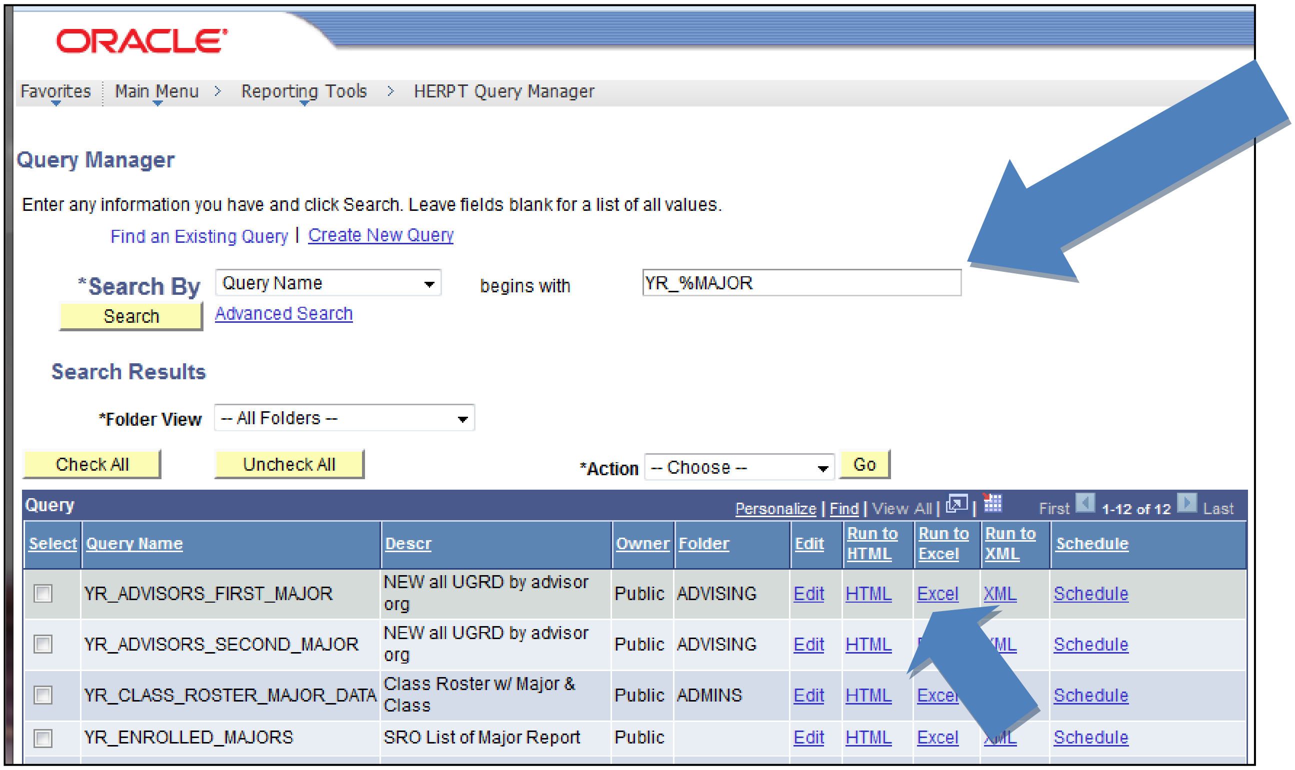
<u>Private Queries</u>

Private queries can only be run by the person who "owns" them. The Office of the Registrar can create queries for others. Private queries can be requested in two ways. A request for a new query is made using the Office of the Registrar Ad hoc Request Form (See Appendix A). Once the new query has been written and tested it would be assigned to the requester's PeopleSoft query ID. At that point it's available for the requester to run on demand.

A private query can also be "cloned" from an existing query. For example, an AA in the Math department has a query that selects all students who have petitioned to graduate from that department. You would like to run a similar query for the Theatre & Dance department. To have the query **modified** for your department you would send the Ad hoc Request Form to the Office of the Registrar giving the name of the person in the Math department and the name of the query that they run. You would request that the query be modified to select students from the Theatre & Dance department, and then assigned to your ID. The primary responsibility to create, change, and save private queries for AA's resides with the Office of the Registrar.

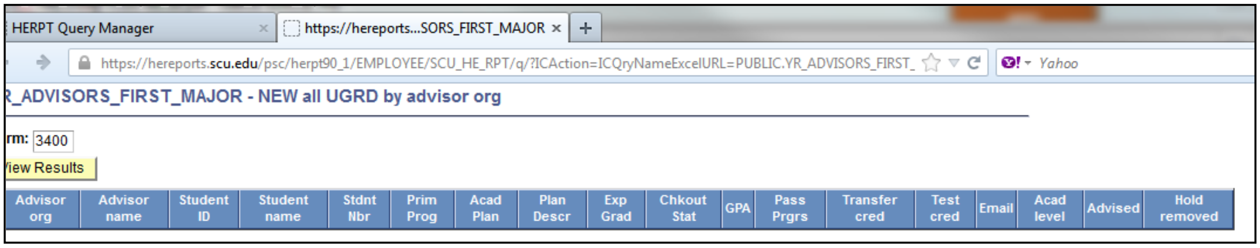
Running Existing Queries

1. To locate public queries, type in “YR” in the “begins with” field and click on “Search”.
   a. To focus on a particular kind of query, you may use the % sign as a wildcard. Note that queries that match the YR and wildcard of Major are listed in alphabetical order.

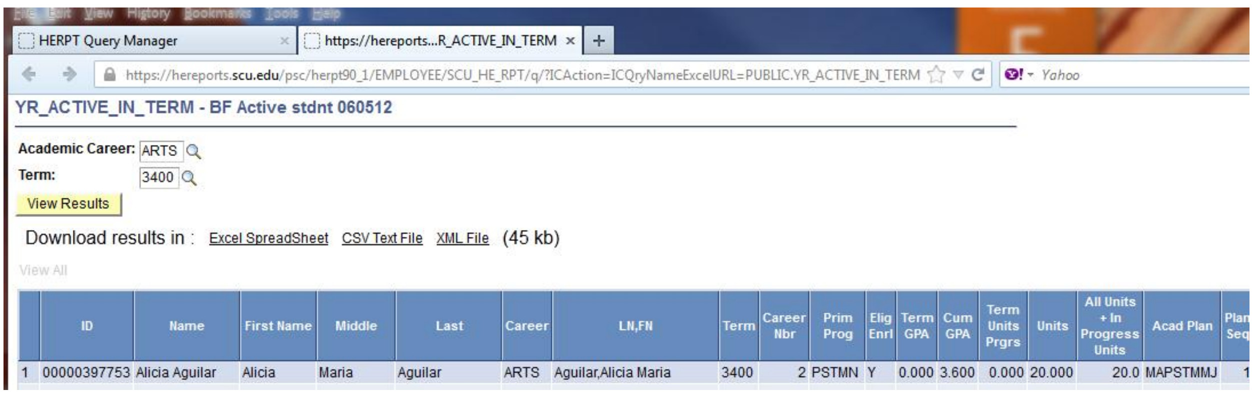


2. To run the query, press on the Excel link next to the name of the query you want to run. In this example we will run “YR_ADVISORS_FIRST_MAJOR”.

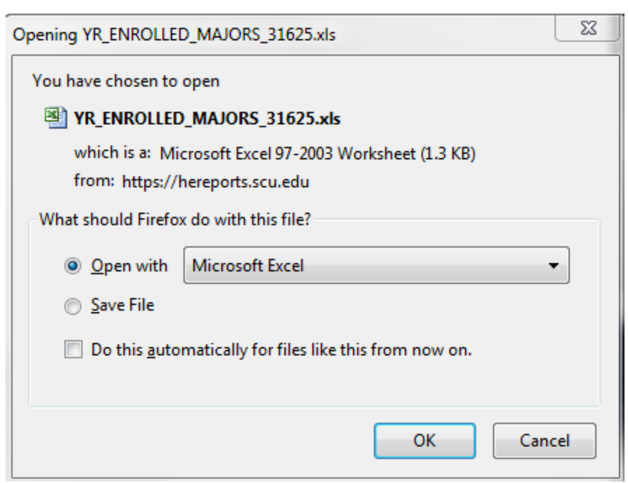
3. Sometimes the system will prompt you for information to make the query results very specific. In the following query you are required to specify the term. Then click on "View Results"



4. The system returns your results. At this point you can click on "Excel Spreadsheet"



Depending on your browser, it may bring you to the following screen (Firefox) and then you click on the "ok "button to direct the system to return the results in Excel format. It also may just automatically bring up your results in Excel format skipping this step.



Example of results:

NEW all UGRD	4999						
Advisor org	**Advisor name**	**Student ID**	**Student name**	**Stdnt Nbr**	**Prim Prog**	**Acad Plan**	**Plan Descr**
ACTG	Barnes,Roger A			1	UBUSN	BCFNCEMJ	Finance
ACTG	Calegari,Michael J			1	UBUSN	BCACTGMJ	Accounting
ACTG	Calegari,Michael J			1	UBUSN	BCACTGMJ	Accounting
ACTG	Calegari,Michael J			1	UBUSN	BCACTGMJ	Accounting

In the future, higher level query classes will be offered. If you are interested in learning more about the PeopleSoft query tool watch the training site for new class offerings. http://www.scu.edu/training

It is also highly recommended that you take EXCEL classes through the training center to learn how to sort, filter and use pivot tables to easily manage the data.

If you have any questions feel free to contact me. My email is lzhao@scu.edu.

Thank you!