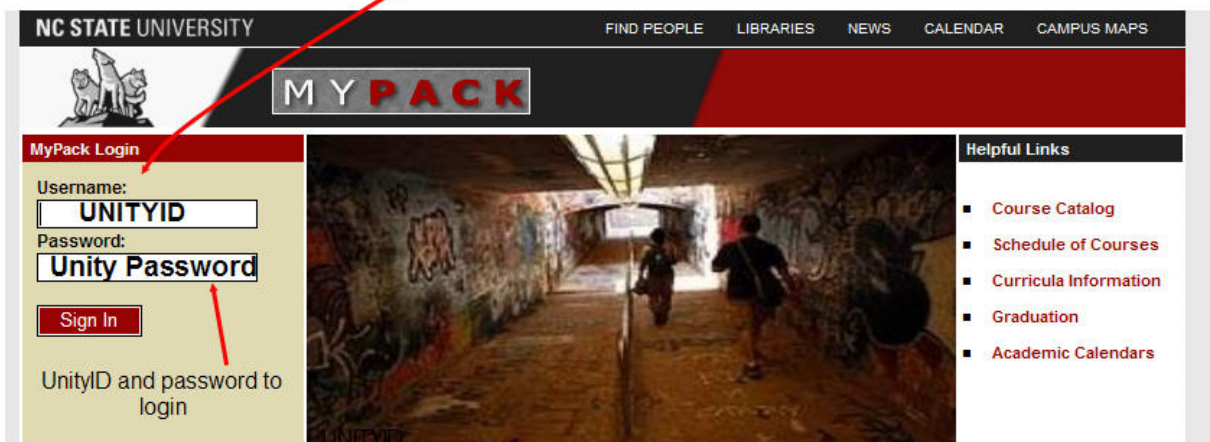
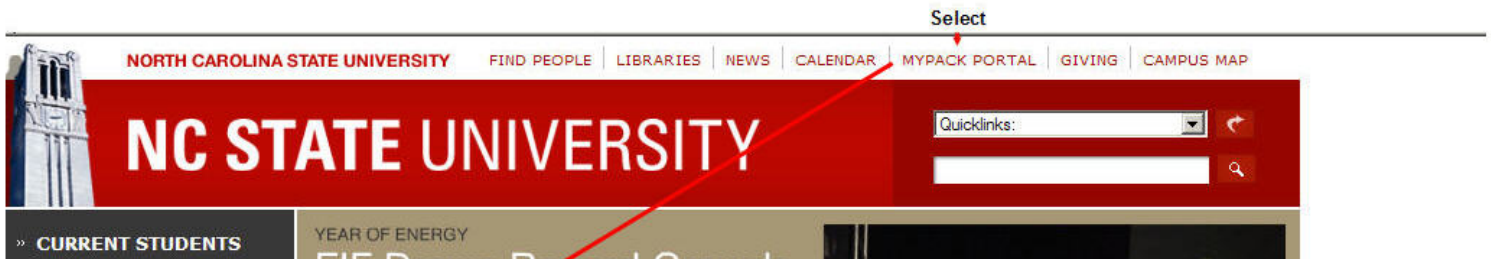


## INTRODUCTION

HRIM has developed public queries which are accessible to campus users that have access to People Soft Query. All Public queries beginning with HR. Public queries can be modified and made into a private query which only the user that created the query can access. These private queries can be copied to other users.

The data for the public queries is retrieved from Denorm table. The Denorm tables drop records after 18 months. The user must select the Reporting Environment. The reporting environment is one day behind the Production Environment.



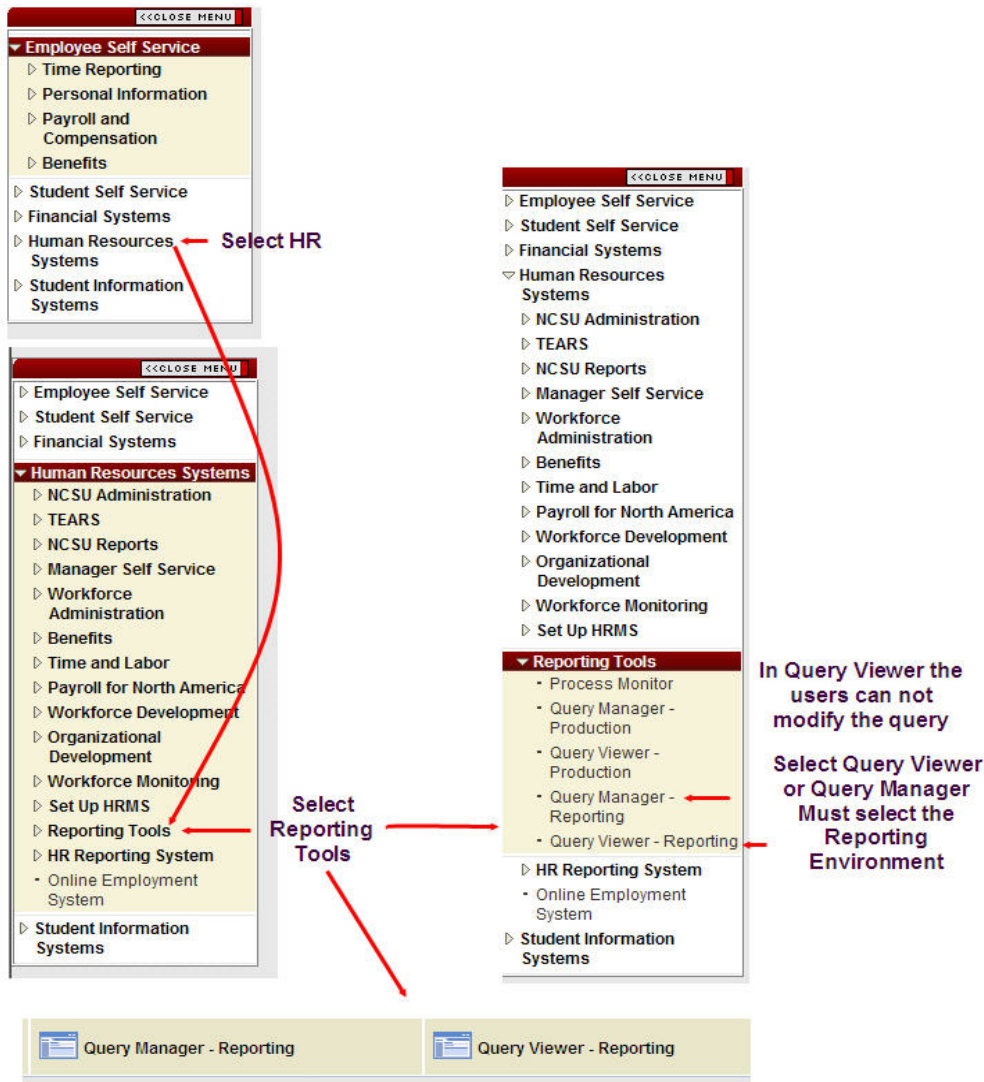
Login to People Soft with the Unity ID and Unity Password

The user must have access to People Soft Query in order to access Query

If the user is having problems with the login they should contact the Solutions Center at 513-1178 or [acs\\_help](#).

# Navigation to People Soft Query

Select Human Resources Systems – Reporting Tools – Query Viewer Or Query /Manager



## Query Viewer:

The user would login to the Query Viewer if they wanted to run the query to HTML or Excel. Modifications to the query cannot be made in Query Viewer.

## Query Manager:

From the Query Manager the user performs the same tasks as from the query viewer. With query manager the user has the capability to make modifications to the query.

# QUERY VIEWER

**Query Viewer**

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

\*Search By:  begins with

[Advanced Search](#)

Type "HR" and hit Enter or Search for the list of all HR public queries

For the list of Public HR Queries the "Search By" should remain as the default option of "Query Name". Type HR in the "Begins with" field. This will provide the user with all of the queries that begin with HR.

The List of public queries beginning with HR are displayed

**Search Results**

\*Folder View:

The user is able to use the wildcard % to enhance the search

Allows user to view all public queries they have access to

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
HR_A	List of Active employees	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>	<a href="#">Favorite</a>
HR_ACCTG_LINE		Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>	<a href="#">Favorite</a>
HR_ACTION_BY_DATE_RANGE	Actions by date range	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>	<a href="#">Favorite</a>

Query Name and Description

View the results in a new window

Exports results to Excel

Add query to the favorite list

**Query Viewer**

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

\*Search By:  begins with

[Advanced Search](#)

This example will find all queries the user has access to that have "temp" in the query name

To run the query to HTML, select Run to HTML. The result of the query will display in a new window.

Download results in : [Excel Spreadsheet](#), [CSV Text File](#) (1991 kb)

[View entire list](#)

User can download to CSV or Excel File

[View All](#)

	Job Code	DeptID	Empl Class	Salary	FTE	Pay Status	Highest Educati	Original Start Date
1	F021	160601	2	71847.000	1.000000	A	Doctorate	08/16/1998
2	12264	513001	1	55673.000	1.000000	A	HS +2	11/05/1990

View entire list allows user to view all rows.

The user can use the arrows on the right side of the page to move up and down in the list.

The user can download the file to a CSV or Excel file. The prompt data is not required again when you download the file to Excel.

To return to the query the user must select File- Close Tab

**Run to Excel** - If a prompt is required by the query – the user will need to supply the information for the prompt. The results will download to Excel.

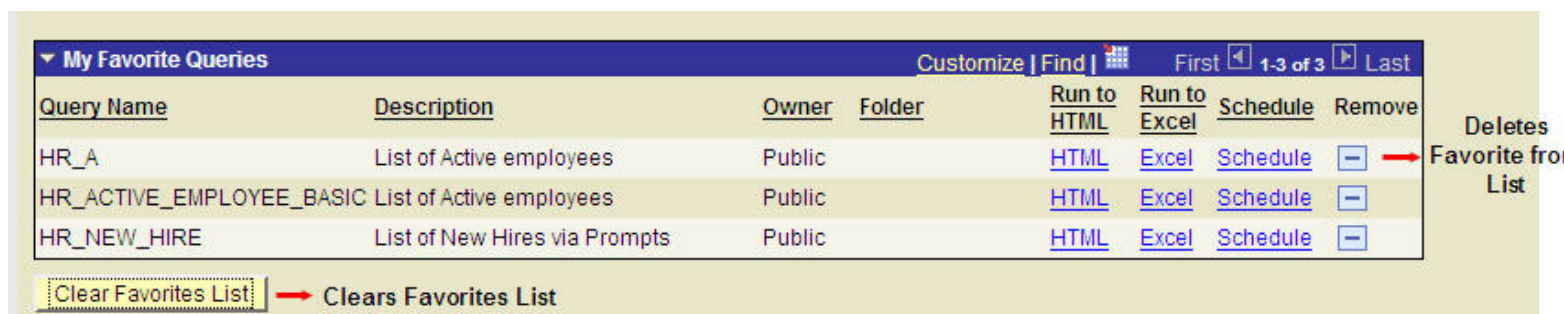


Number of rows retrieved

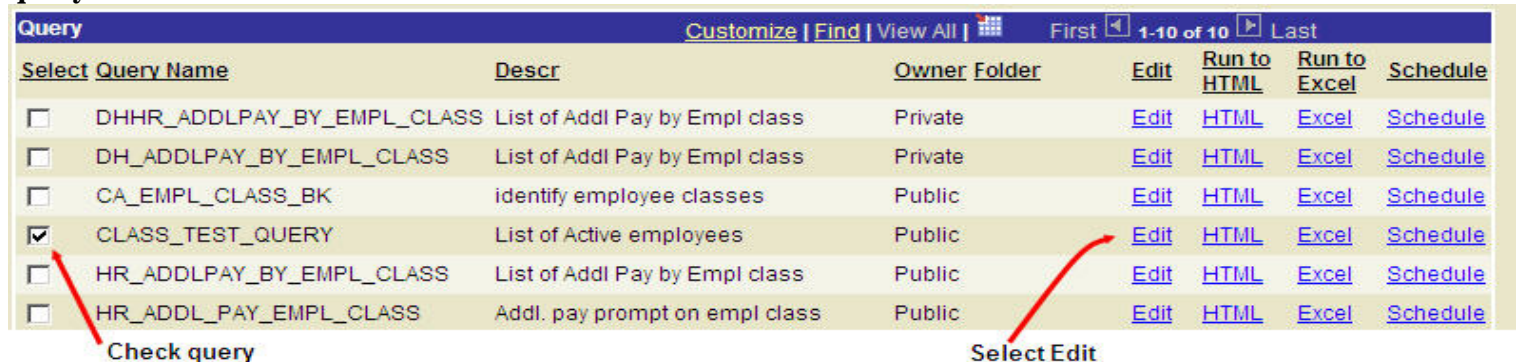
	A	B	C	D	E	F	G	H	
1	List of Active employees	7902							
2	Job Code	DeptID	Empl Class	Salary	FTE	Pay Status	Highest Educati	Original Start Date	Descr
3	F021	160601	2	71847.000	1.000000	A	Doctorate	8/16/1998	EPA Emp
4	12264	513001	1	55673.000	1.000000	A	HS +2	11/5/1990	SPA Emp
5	F011	120301	2	100374.000	1.000000	A	Master's	8/24/1981	EPA Emp
6	C810	140604	2	64457.000	1.000000	A	Bachelor's	2/1/1999	EPA Emp

Excel displays the number of records retrieved at the top of the spreadsheet.

**Add to Favorites** - Add to Favorites allows the user to add queries to the favorite list. If favorites have been added they will display on the top of the screen at login time. The favorites will be displayed in both environments. The user can clear the favorites list by selecting “Clear Favorites List”. The user can get back to the HR query list by typing HR in the “begins in” box. A query can be deleted from the favorites list by selecting “Minus” under remove.



**Modify the Query** – The user must be in Query Manager to modify the query.



If the user would like to run the query to HTML or Excel and not change the query they would follow the instructions for Query Viewer. If the user would like to modify the query they will select Query Manager Reporting. The list of queries will display. Type HR for the HR queries. . Place a check by the query name and select “Edit”. The default tab will be the Fields Tab.

## FIELDS TAB

Using the Fields Tab the user can:

Add a field to the criteria

Edit the heading for a field

Delete the field

Reorder/Sort the entire fields list

To add a field to the fields list, the user will select the Query Tab. (Refer to the documentation for Query Tab).

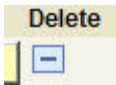
Query Name: CLASS\_TEST\_QUERY Description: List of Active employees

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

Col	Record	Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	B.	JOBCODE - Job Code	Char6				Job Code			
2	B.	DEPTID - Department	Char10				DeptID			
3	B.	EMPL_CLASS - Employee Classification	Char3		N		Empl Class			
4	B.	ANNUAL_RT - Annual Rate	Num16.3				Salary			
5	B.	FTE - FTE	Num2.6				FTE			
6	B.	NAME - Name	Char50				Name			

Buttons: Save, Save As, New Query, Preferences, Properties, New Union, Return to Search

To delete a field from the fields list – Select the “Minus”



To add the field back to the list or to add additional fields, the user must select the Query Tab. (Refer to the Query Tab documentation).

To edit a heading for a data field – Select “Edit” The Edit Field Properties will appear  
The user must select the radio button “Text” and type the heading name under “Heading Text”.

Field Name: A.DESCR - Description

Heading

No Heading  RFT Short

Text  RFT Long

Heading Text: Description

\*Unique Field Name: A.DESCR

Aggregate

None

Sum

Count

Min

Max

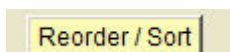
Average

Buttons: OK, Cancel

To add criteria to the query select “ Add Criteria”  
(Refer to the Add Criteria documentation).



The user can Reorder/Sort the fields list.



In the example below Empl\_Class will become the first data field in the list. The data will be sorted by Empl\_Class by Descr. The query defaults to ascending order. To change to descending sort order check under “Order By Descending” next to the data field.

**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.

New Column	Column	Record.Fieldname	Order By	Descending	New Order By
	1	A.SETID - SetID		<input type="checkbox"/>	
	1	A.EMPL_CLASS - Employee Classification		<input type="checkbox"/>	1
		A.EFFDT - Effective Date		<input type="checkbox"/>	
		A.EFF_STATUS - Status as of Effective Date		<input type="checkbox"/>	
		A.DESCR - Description		<input type="checkbox"/>	2
		A.DESCRSHORT - Short Description		<input type="checkbox"/>	
		A.DATA_TYPE_CD - Data Type CD		<input type="checkbox"/>	

OK Cancel **Empl\_Class will become the first field** **The data will sort by Empl\_Class by Descr**

## QUERY TAB

From the Query tab the user can determine the records included in the query. Data fields can be added or deleted.

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

Query Name: **QUERY TAB** Description: List of Active employees  
CLASS\_TEST\_QUERY


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	Click to expand
B	NC_ASSGN_EMP_VW - Assignment Employee View	<input type="checkbox"/>
A	EMPL_CLASS_TBL - Employee Class Table joined with B.EMPL_CLASS - Employee Classification	<input type="checkbox"/>

Expand All Records Collapse All Records

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

The user can expand the records to view all data fields by selecting the folder . The data fields are added to the fields list by checking the box next to the data field. Removing the check will remove the field from the list.

Query Name: CLASS\_TEST\_QUERY Description: List of Active employees

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. **Sort**

**Chosen Records**

Alias	Record	Click to collapse
B	NC_ASSGN_EMP_VW - Assignment Employee View	<input type="checkbox"/>

Check All Fields Uncheck All Fields

**Fields** Find | View 100 First 1-50 of 149 Last

Field	Check the field to include	Check off or not include the
<input type="checkbox"/> EMPLID - EmplID	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> EMPL_RCD - Empl Rcd Nbr	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> NAME - Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Add Criteria

The data fields can be sorted by selecting the A/Z in the right hand corner



Selecting A/Z will sort the data fields in alpha order.

Add Criteria



The user can add criteria from the Query Tab

(see documentation for Add Criteria documentation)

## CRITERIA TAB

The criteria tab allows the user to edit, delete or add criteria to the query.

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	B.EFFDT - Effective Date	Eff Date <=	Current Date (EffSeq = Last)	Edit	-
AND	B.EMPL_STATUS - Payroll Status	in list	('A','L','P','Q')	Edit	-
AND	A.EFFDT - Effective Date	Eff Date <=	B.EFFDT - Effective Date	Edit	-
AND	A.SETID - SetID	equal to	:1 Prompt	Edit	-
AND	B.EMPL_CLASS - Employee Classification	in list	('1','2')	Edit	Delete Criteria
AND	B.COMP_RATECD - Comp Rate Code	not equal to	TMPSP	Edit Criteria	Edit

Delete



Delete the criteria from the query – Select “Minus”

The condition type is most important for the criteria tab. “Equal to” as the condition allows only one value for the criteria. “In List” allows multiple values. To display the conditions the user will select the dropdown arrow – the list of conditions will display. The user should select the appropriate condition type.

\*Condition Type: equal to

Equal to allows one value

\*Condition Type: in list

In list allows multiple values

Edit

Edit

**EDIT THE CRITERIA** – Select “Edit”

The Edit Criteria Properties window will open. The user should select the magnifying glass to see all of the data field values.

### Edit Criteria Properties

Choose Expression 1 Type

Field

Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:

B.EMPL\_CLASS - Employee Classi

\*Condition Type: in list ↖ Drop Down for more conditions

Choose Expression 2 Type

In List

Subquery

Expression 2

Edit List

List Members: ('1','2')

Select to see data values ↖

OK Cancel

The Edit List will display the value in the query. To delete the value uncheck the value and select “Delete Checked Values”. To add a value the user should type the value in the box “Value” and select “Add Value”. To search for the value the user should select “Search”.

### Edit List

List Members Customize | Find | First 1-2 of 2 Last

<input checked="" type="checkbox"/>	1	Check to delete the value
<input type="checkbox"/>	2	Select - Delete Checked Values

Value:  Add Value Search Delete Checked Values

OK Cancel Add value - Select Add Value [Add Prompt](#) Search for values

If the user selects “Search” the SetID panel will appear. For the SetID the user should type USA and select the magnifying glass next to the data field to retrieve the list of values. If the condition type is “in list” the user will be allowed to select multiple values. If the condition list is “equal to” the user will be allowed to select one value.

SetID:  ↖ Type UpperCase USA

Employee Classification:  ↖ Select to retrieve values

OK Cancel

### Search Results

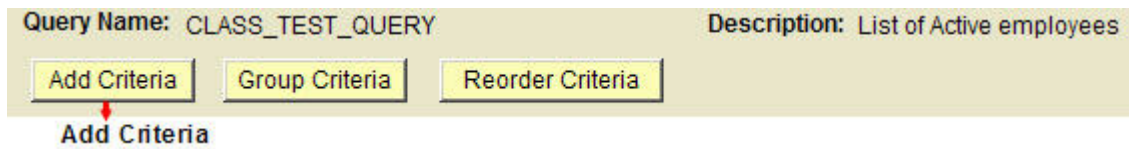
(View All) First 1-12 of 12 Last

Employee Classification	Description	Short Description
<a href="#">1</a>	SPA Employee	SPA
<a href="#">2</a>	EPA Employee	EPA
<a href="#">3</a>	County EPA Employee	CEPA
<a href="#">4</a>	Post Doc Employee	PDOCS
<a href="#">5</a>	Law Enforcement	LawEnfrce
<a href="#">6</a>	Graduate Assistant	GRAD
<a href="#">7</a>	Grad Fellowship	Grad Fello
<a href="#">8</a>	County SPA Employee	CSPA
<a href="#">H</a>	Housing - Resident	HRES
<a href="#">N</a>	No Pay Employee	No Pay
<a href="#">S</a>	Temporary Employee	TEMP
<a href="#">Z</a>	No Pay Employee	No Pay

Select value(s) ↖

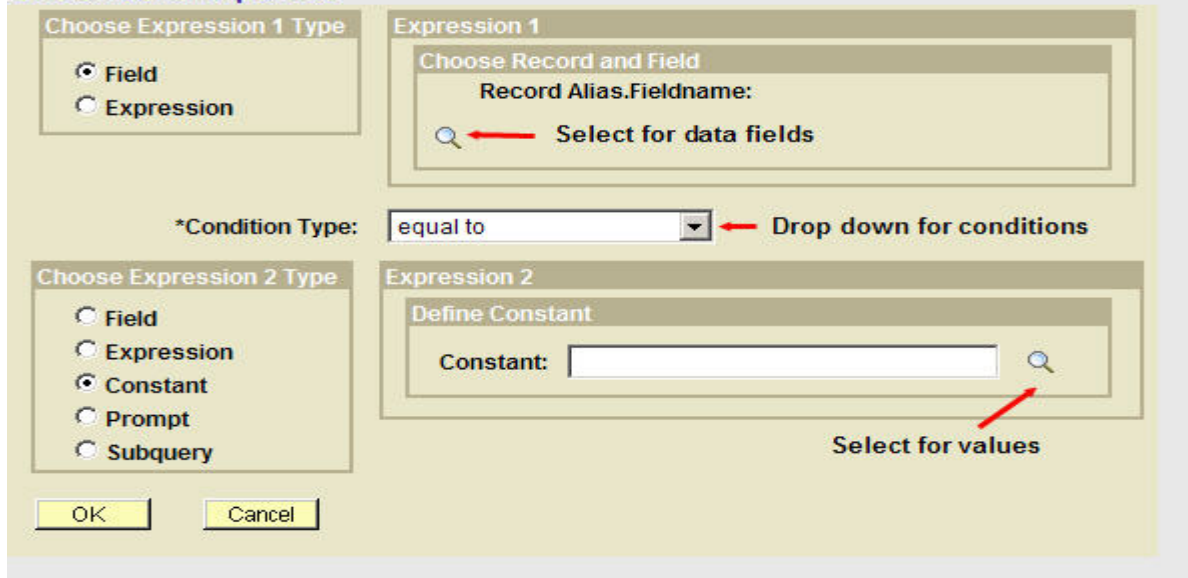
## Add Criteria

To add Criteria from the Criteria tab the user will select “Add Criteria”



The “Add Criteria” button will take the user to Edit Criteria Properties. The user should select the magnifying glass under Expression 1 “Record Alias.Fieldname”.

### Edit Criteria Properties



Show Fields

Show Fields

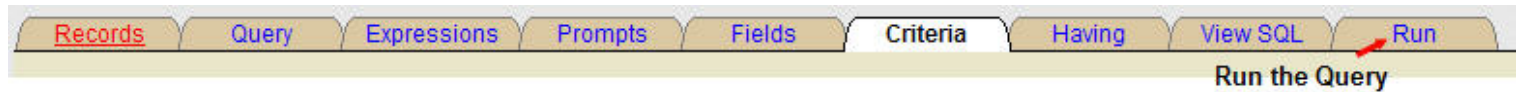
The user should determine the record the data fields are stored in and select “Show Fields”  
The list of data fields will appear. The fields list will be delivered in the sort order that was established in the Query Tab. The user can not sort the fields list from this screen. Once the data field name is located click on the data field name to add it as criteria. The “Find”<sup>Find</sup> can be use to attempt to find the data field name. The user can type the entire data field name or a portion of the data field name.



Criteria can also be added from the query tab and the fields list tab by selecting  
(Refer to documentation for adding criteria).

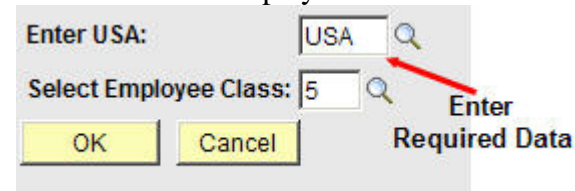
## RUN TAB

The user will preview the data from the RUN tab. The data will be displayed in a new window.



If the query requires prompts the user will need to supply the data required.

In the example below the user will supply USA so the translation will be correct. Police Officers (employee class 5 will be 5 will be displayed.



The data is displayed to a new window. The user can rerun the Query or download the results to Excel. The prompt information is not required when downloading to Excel from this window. The total number of records is displayed. To move back and forward in the list, select First or Last.

	Job Code	DeptID	Empl Class	Salary	FTE
1	15830	425001	5	45984.000	1.000000
2	15836	425001	5	66500.000	1.000000
3	15836	425001	5	59427.000	1.000000
4	15830	425001	5	38839.000	1.000000
5	15836	425001	5	59427.000	1.000000

The user will select any tab to return to the query.



## Results In Excel

The results in Excel. The user should delete the first row. This is the number of records retrieved.

1	47	Number of Records			
2	Job Code	DeptID	Empl Class	Salary	FTE
3	15830	425001	5	45984.000	1.000000
4	15836	425001	5	66500.000	1.000000
5	15836	425001	5	59427.000	1.000000
6	15830	425001	5	38839.000	1.000000

## Save the Query

To save the Query the user should select [Save As](#). The name of the query can not be the same name. The user is allowed to enter a brief description and a more detail description of the query. The Owner will always be Private.

**Enter a name to save this query as:**

\*Query:  Change the name of query

Description:  Description


Folder:

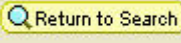
\*Query Type:

\*Owner:  Must be PRIVATE

Query Definition:

Description of query

The user should save the query often by selecting  from any tab.

From any tab the user can return to the query list by selecting 

The user will receive the following message if changes have been made to the query..

Discard current query? (all changes since the last save will be lost) (139,25)

**Select Yes or No**

If the user wants to save the query select “No”. Selecting NO will take the user back to the query and allow the user to save the query. Selecting “Yes” will discard the charges made to the query.

## Query Action

The action box allows the user to perform several tasks.

Folder View:

Select Action

\*Action:

Query	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Schedule
<input type="checkbox"/>	DHHR_ADDLPAY_BY_EMPL_CLASS	List of Addl Pay by Empl class	Private		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	DH_ADDLPAY_BY_EMPL_CLASS	List of Addl Pay by Empl class	Private		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	CA_EMPL_CLASS_BK	identify employee classes	Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>
<input checked="" type="checkbox"/>	CLASS_TEST_QUERY	List of Active employees	Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>

**Select query**

The user can copy a private query to another user. Under Action select “Copy to User” and select go.

The Unity ID in all caps must be entered as the User ID. If the query is to be copied to the user again, the query must be deleted. The copy will not overlay an existing query.

**Enter the user id to copy the selected queries to:**

User ID:  ←

OK

Cancel

To delete the private query/queries the user will select the query and select Delete Selected under Action. The User will received a message to confirm the permanent deletion of all selected queries. If the user does not want to delete the query/queries they should select “NO”

Check All    Uncheck All    Select Delete → \*Action:     Go

Select	Query Name	Descr	Owner	Folder	Run Edit to HTML	Run to Excel	Schedule
<input type="checkbox"/>	DHHR_ADDLPAY_BY_EMPL_CLASS	List of Addl Pay by Empl class	Private		<a href="#">Edit</a> <a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	DH_ADDLPAY_BY_EMPL_CLASS	List of Addl Pay by Empl class	Private		<a href="#">Edit</a> <a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>
<input checked="" type="checkbox"/>	CA_EMPL_CLASS_BK	identify employee classes	Public		<a href="#">Edit</a> <a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>
<input checked="" type="checkbox"/>	CLASS_TEST_QUERY	List of Active employees	Public		<a href="#">Edit</a> <a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>

→ Select the query

The user can rename one or multiple queries. The user should select Rename Select under Action and select the query/queries they wish to rename.

\*Folder View:

Check All    Uncheck All    Select Rename → \*Action:     Go

Select	Query Name	Descr	Owner	Folder	Run Edit to HTML	Run to Excel	Schedule
<input type="checkbox"/>	DHHR_ADDLPAY_BY_EMPL_CLASS	List of Addl Pay by Empl class	Private		<a href="#">Edit</a> <a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	DH_ADDLPAY_BY_EMPL_CLASS	List of Addl Pay by Empl class	Private		<a href="#">Edit</a> <a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>
<input checked="" type="checkbox"/>	CA_EMPL_CLASS_BK	identify employee classes	Public		<a href="#">Edit</a> <a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>
<input checked="" type="checkbox"/>	CLASS_TEST_QUERY	List of Active employees	Public		<a href="#">Edit</a> <a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>

→ Select query

For “Add to Favorites” see (Add to Favorite documentation).

## Value Translations

Employee Status - Data Field Name Empl\_Status

Values			
Field Value	Translate Long Name	Translate Short Name	Add Value
A	Active	Active	Add Value
D	Deceased	Deceased	Add Value
L	Leave of Absence	Leave	Add Value
P	Leave With Pay	Leave W/Py	Add Value
Q	Retired With Pay	Ret w/Pay	Add Value
R	Retired	Retired	Add Value
S	Suspended	Suspended	Add Value
T	Terminated	Terminated	Add Value
U	Terminated With Pay	Term w/Pay	Add Value
V	Terminated Pension Pay Out	Term w/Pen	Add Value
W	Short Work Break	Work Break	Add Value
X	Retired-Pension Administration	Ret - PAdm	Add Value

Employee Class - Data Field Name Empl\_Class

Employee Classification	Description	Short Description
1	SPA Employee	SPA
2	EPA Employee	EPA
3	County EPA Employee	CEPA
4	Post Doc Employee	PDOCS
5	Law Enforcement	LawEnfrce
6	Graduate Assistant	GRAD
7	Grad Fellowship	Grad Fello
8	County SPA Employee	CSPA
H	Housing - Resident	HRES
N	No Pay Employee	No Pay
S	Temporary Employee	TEMP
Z	No Pay Employee	No Pay

