Basic Query for Human Resources
Log into PeopleSoft Human Resources:

- Open browser
- Go to: [https://cubshr9.clemson.edu/psp/hpprd/?cmd=login](https://cubshr9.clemson.edu/psp/hpprd/?cmd=login)
- Enter your Novell ID and Password
- Click Sign In

Navigation into Query Tools:

- Select Reporting Tools
- Query
- Query Manager or Query Viewer
  - Query Manager – Used to view the definition of an existing query, edit an existing query, run an existing query, or to create a new query.
  - Query Viewer – Used to view/run an existing query

Query Viewer

- To search for an existing query – type part or entire name of query – click search
- Query view only allows a user to run an existing query either to HTML or Excel. A user cannot edit or create queries in this application.
Query Manager

- Query Manager allows a user to run an existing query, edit an existing query, or create a new query. Click on Edit to open an existing query to modify or run.

Create a New Query in Query Manager

- Reporting Tools – Query – Query Manager
- Click on “Create New Query” link

- Enter the entire record name or partial name
- Click the search button

- In the record name list, Click on “Show Fields” to view all fields in that record OR click on “Add Record” to select the record.
When “Show Fields” is selected, a list of fields appears. You can click on the “Description” column header to sort the list alphabetically. When finished viewing the list of fields, scroll to the bottom of page and click “Return”.

When “Add Record” is selected, if the record is an Effective Dated record, this warning message will appear. Click OK.
Query for HR

- Notice when record is selected, you will automatically move to the “Query Tab” across the top.

- When a record is selected, the system automatically assigns a letter prior to the record name.

- The fields in each record appear with checkboxes. Click the checkbox beside each field name to select the field to be included in the query. You can click “Check All” button to include all fields in your query or “Uncheck All” button to deselect all fields.

Editing Fields

- Selected fields can be viewed by clicking the Fields tab.
• **Col** – shows which column the field will appear in on the results window. Ex: 1 = column 1 in the results; 2 = column 2 in the results, etc.

• **Record.Fieldname** – Shows which record a field was selected from for the query and the field name.

• **Format** – Type of field (character, numeric, date, etc).

• **Ord** – The sort order of the fields

• **XLAT** – Translate Table Value

• **Agg** – Aggregate field (for numbers)

• **Heading Text** – The title of the column in the results

• **Add Criteria** – Click on this icon to add criteria to the query

• **Edit** – Edit button to edit the field’s properties

• **Delete** – Delete button to delete the field from the query

• Click Reorder/Sort button, which brings up the Edit Field Ordering box below that allows you to reorder the columns and change or select the order of all fields at one time. Make the necessary changes and click OK.

![Edit Field Ordering](image)
Click the “Edit” button at the end of the row, which brings up the Edit Field Properties box below. Click OK when changes are completed.

Adding Criteria

To add Criteria to a field, click the “Add Criteria” Icon

![Edit Field Properties](image1)

![Adding Criteria](image2)
Query for HR

- **Expression 1 Type** – This is where you specify what you are comparing.
  - **Field** – Compares to a field within the records in the query.
  - **Expression** – Compares to an expression that you have created in the query.
- **Expression 1** – This is where you select the field or expression you want to compare.
- **Condition Type** – This is where you correlate between Expression 1 and Expression 2.
- **Expression 2 Type** – This is where you specify what Expression 1 is being compared to.
- **Expression 2** – This is where you enter the field, expression, constant, or prompt.

Criteria can be viewed by selecting the Criteria tab.

Save the query

- Click on the Save As button at the bottom left corner of the screen
  - Enter a name for the query
  - Enter a description if needed
  - The Query type should be User
  - The Owner can be Private or Public
    - **Private** – Only you as the creator can see the query
    - **Public** – Anyone can see, edit, or run the query
  - Click OK
When applying Condition Types to Criteria, the following information should be helpful:

<table>
<thead>
<tr>
<th>Condition Type</th>
<th>Expression 2</th>
<th>Description of Condition Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equal to</td>
<td>Constant</td>
<td>Finds rows of data with a value that matches the constant in Expression 2</td>
</tr>
<tr>
<td>Not equal to</td>
<td>Constant</td>
<td>Finds rows of data without the value that matches the constant in Expression 2</td>
</tr>
<tr>
<td>Greater than</td>
<td>Constant</td>
<td>Finds rows of data with a value greater than the constant in Expression 2</td>
</tr>
<tr>
<td>Not greater than</td>
<td>Constant</td>
<td>Finds rows of data not greater than the constant in Expression 2</td>
</tr>
<tr>
<td>Less than</td>
<td>Constant</td>
<td>Finds rows of data less than the constant in Expression 2</td>
</tr>
<tr>
<td>Not less than</td>
<td>Constant</td>
<td>Finds rows of data not less than the constant in Expression 2</td>
</tr>
<tr>
<td>Like (% and _ wildcards)</td>
<td>Constant</td>
<td>Finds rows of data that match specific specified data</td>
</tr>
<tr>
<td>Not like (% and _ wildcards)</td>
<td>Constant</td>
<td>Finds rows of data that does not match specific specified data</td>
</tr>
<tr>
<td>In list</td>
<td>In List</td>
<td>Finds rows of data in a specified list of data</td>
</tr>
<tr>
<td>Not in list</td>
<td>In List</td>
<td>Finds rows of data in a specified list of data</td>
</tr>
<tr>
<td>Between</td>
<td>Constant – Constant</td>
<td>Finds rows of data between 2 specified constants</td>
</tr>
<tr>
<td>Not between</td>
<td>Constant – Constant</td>
<td>Finds rows of data not found between 2 specified constants</td>
</tr>
</tbody>
</table>
• Click on the Run tab to run the query and view results

![Image of query interface]

• Results are displayed. You can rerun query by clicking Rerun Query or run query results to Excel by clicking Download to Excel.

![Image of query results]

**Add a Prompt**

• Click on the prompts tab
• Click Add Prompt
• Click the magnifying glass under Field Name to search for a field

![Image of Add Prompt properties]

Use magnifying glass to search for a field.
Add a Prompt (Continued)

- Enter the name of the field
- Click Search
- Select the appropriate field
- Click OK
- Add criteria, using same field used for prompt and select Prompt for Expression 2 Type
- Select the magnifying glass in Expression 2 to add the prompt
- Click OK
Add a Prompt (Continued)
- Select the appropriate prompt
- Click OK

Run a Query with Prompt
- When you are ready to run your query click on the Run tab
- When prompted, enter appropriate information and click OK

Join a Record
- Click on the Records tab
- Enter a record name or partial record name
- Click on Search
Join a Record (continued)

- Click join record next to the appropriate record

- Select “Join to filter and get additional fields (Standard Join)”
- Select the record to join with
- Select “Add Criteria”
Join a Record (continued)

- When “Add Criteria” is selected, if the record is an Effective Dated record, this warning message will appear. Click OK.

- After joining the records you will automatically move to the “Query Tab” across the top. You can select additional fields to be in your query.