Creating a Query

Concept

Creating your own queries enables you to select the table or tables from which you need to retrieve data. You can also select the fields within the tables so that the query displays only the required data.

This topic provides the basic information of how to select tables and fields for creating queries by using Query Manager. When creating a query, you can specify query attributes and perform such tasks as modifying column headings and specifying the sort order.

In this topic, you want to create a query about student degrees.
### Procedure

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
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</thead>
<tbody>
<tr>
<td>1.</td>
<td>Begin by navigating to the <strong>Records</strong> page. Click the <strong>Reporting Tools</strong> link.</td>
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</table>

![PeopleSoft interface with Reporting Tools link highlighted]
Step | Action
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2. | Click the **Query Manager** link.

**Query Manager**
3. Click the **Create New Query** link.

4. The **Records** page enables you to select the records upon which to base the new query. Select the criteria to use when searching for records. You can search for existing records by entering appropriate keywords.
### Step 5
The first step in creating a query is to open an existing record on which you want to base the query. You want to create a query about student degrees, but are not certain of how the record name is stored in the database. You know the record name contains the letters DEG, so you can do an advanced search to locate records containing those letters.

Click the **Advanced Search** link.

### Step 6
You need to change the search operator for the **Record Name** field.

Click the **Record Name** list.

### Step 7
Change the operator to **contains**.

Click an entry in the list.

### Step 8
Click in the **Record Name** field.

### Step 9
Enter the desired information into the **Record Name** field. Enter "DEG".

### Step 10
Click the **Search** button.
### Step 11

The search results display all the records that contain the letters DEG. Use the ACAD_DEGR - Student Degree Table record to create the query. Click the **Add Record** link.

![Add Record](image-url)

### Step 12

The **Query** page appears, displaying several fields. Use this page to add fields to a query. Add the fields, EMPLID, DEGREE, INSTITUTION, ACAD_CAREER, DEGR_CONFER_DT, and ACAD_DEGR_STATUS to the query. Click the **EMPLID** option.

![EMPLID](image-url)

12. Click the **EMPLID** option.

![EMPLID](image-url)

13. Click the **DEGREE** option.

![DEGREE](image-url)

14. Click the **INSTITUTION** option.

![INSTITUTION](image-url)

15. Click the **ACAD_CAREER** option.

![ACAD_CAREER](image-url)

16. Click the **DEGR_CONFER_DT** option.
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<tr>
<td>17.</td>
<td>Click the <strong>ACAD_STATUS_DATE</strong> option.</td>
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</table>

Next, you need to edit the selected fields. Navigate to the **Fields** page. Click the **Fields** tab.

The **Fields** page displays the fields that you selected. In the **Record.Fieldname** column, notice the letter **A** before each field name. This letter is an alias that represents the table from which this field has been extracted.
Step 20. You can change the order of the columns that the fields are displayed in by clicking the **Column Order** button. Click the **Column Order** button.
Step | Action
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21. | You need the Academic Degree Status field to appear before the Confer Date field in your report. Currently the Confer Date field appears at the fifth position. Enter the desired information into the **Column Order** field. Enter "6".
22. | Click in the **Column Order** field.
23. | Now you can change the **Academic Degree Status** field to appear in column 5. Enter the desired information into the **Column Order** field. Enter "5".
24. | Click the **OK** button.
25. Notice that the **Academic Degree Status** field now appears before the **Confer Date** field.

Next, use the **Edit** button to change attributes of the **Confer Date** field. Click the **Edit** button.
26. You need to change the column heading for the Confer Date field to **Degree Confer Date**. Click the **Text** option.
### Step 27
Click in the **Heading Text** field.

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<td>28.</td>
<td>Enter the desired information into the <strong>Heading Text</strong> field. Enter &quot;Degree Confer Date&quot;.</td>
</tr>
<tr>
<td>29.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>

**NOTE:**

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<td>30.</td>
<td>Notice the new heading text for the <strong>Confer Date</strong> field. Click the <strong>Save Query</strong> button.</td>
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</table>
### Step 31
You can specify a name and description for the new query you created. Enter the desired information into the *Query field. Enter "DEGREES".*

### Step 32
Click in the **Description** field.

### Step 33
Enter the desired information into the **Description** field. Enter "General info about degrees".*

### Step 34
The **Query Type** field enables you to specify the type of query as User, Process, or Role. Standard queries are defined as User types, and queries that use workflow are defined as Process or Role types. For the exercise, retain the default query type.

### Step 35
You can specify the query as either Private or Public by selecting an entry in the **Owner** field. A Private query can be accessed and modified by only the user who created the query. However, any user who has access to the query records can run, modify, or delete a Public query. For this exercise, retain the default values.

### Step 36
Click the **OK** button.
37. Finally, view the results of the query. Click the **Run** tab.

38. The **Run** page enables you to preview the query you have just created. Click the **View SQL** tab.
Creating your own queries enables you to select the table or tables from which you want to execute a query and to design the fields within those tables so that only the data you want displays.

**End of Procedure.**