



Specialized PeopleSoft 9.2



PeopleSoft v9.2 Query Manager Basic and Advanced Course for FSCM & HCM

Course Presentation

Agenda

➤ Introductions

- About SpearMC Consulting
- About the Instructor

➤ About this Course

➤ Course Lessons

- 11 Course Lessons
- 11 Exercises
- 10 Min Break Every hour and 15 mins.*
- Break for Lunch 12pm – 1 Hour*

➤ Q&A.....if time permits*

**Applicable only to live-classroom training! If purchased online, this material is intended as a self-paced study guide.*

About This Course

➤ PeopleSoft Query Design Tool

- Intended for both End Users and Technical Professionals
- Foundation for Participating in Advanced Query Training
- Using Supply Chain & Finance Modules for Demonstrations

➤ Course Format

- Learn – PowerPoint Explanation*
- See – Demos*
- Do – Exercises*

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Introductions – About SpearMC Consulting



- SpearMC is a full-service consulting and technology services firm **focusing on PeopleSoft ERP**
- Our consultants and network of PeopleSoft Analysts, Technical Leads and Project Managers **average fifteen years of PeopleSoft experience**
- We are North America's **leading provider of custom-tailored PeopleSoft ERP training solutions** and educational content development.
- It is our goal to provide the highest levels of **professional service at competitive rates**

Introductions – About SpearMC Consulting



In 2012 and 2013,
SpearMC was recognized by **Inc. Magazine** as one of the
Inc. 5000 Fastest-Growing Private Companies in America
and by the
San Francisco Business Times
as one of the
100 Fastest-Growing Companies in the Bay Area

Introductions – About the Instructor



Course Instructor – Keith Harper

➤ 23 Years Experience in Business

- Information Technology
- Supply Chain Operations
- Product Development
- Process Improvement
- Consulting

➤ Leader and Team Member PeopleSoft Installations in

- v. 8.0, 8.4, 9.0, 9.1, 9.2
- Supply Chain Modules

➤ Certified

- Six Sigma Black Belt
- APICs Certification

About This Course

➤ Two-Day Agenda

➤ Course Lessons

1. What Is PeopleSoft Query and Basic Navigation
2. PeopleSoft Relational Database Structure
3. Creating a Simple Query (Single Record) – Using Query Manager
4. Modifying Results – Criteria and Filters (Simple Query)
5. PeopleSoft System Structure – SetIDs and Business Units
6. Creating Simple Record Joins (Multiple Records)
7. Prompts and Translate Values
8. Creating Expressions and Aggregate Functions
9. Effective Dating
10. Creating Left Outer Joins
11. Query Viewer, Scheduler and Distributing Results

Lesson 1 – What Is PeopleSoft Query and Basic Navigation

➤ Lesson Topics

1. What is a Query?
2. PeopleSoft Query Tool-Set Overview

What is a Query?

- *Query* means 'to question'
- Information Systems - A query is a request to pull information from a database.
 - Utilizes the programming language SQL (Structured Query Language)
- In a query you indicate what tables (in PeopleSoft: Records) you would like to pull information from.
- Indicate criteria / filters to limit or expand your results to the desired information.
- PeopleSoft Query is a delivered tool that enables even non-technical users to write and run their own queries.

What is PeopleSoft Query?

➤ There are 3 components to PeopleSoft Query:

1. Query Manager - Tool used to create and save the query.
2. Query Viewer - Allows you or other users to run the query and view the results.
 - Output the results in multiple file formats.
e.g. Excel, CSV, HTML
3. Query Scheduler - Enables you to schedule your query to run at a designated time and dispatch the results to you or other individuals or groups.

Lesson 2 – PeopleSoft Relational Database Structure

➤ Lesson Topics

1. What is a Relational Database?
2. Tables, Records, and Keys
3. Tables and Relationships Example

PeopleSoft Relational Database Structure

- **All business information in all PeopleSoft modules is housed in a relational database**
- **A *relational database* is a structured collection of information that is related to a particular subject or purpose.**
 - Examples: Purchase Orders, Employees, Inventory
- **Within the database, you organize the data into storage containers called tables. Tables are made up of columns and rows similar to a spreadsheet.**
 - *Columns* represent individual fields in a table
 - *Rows* represent records of data in a table.

PeopleSoft Relational Database Structure – continued

- Relationships can be defined between tables through the use of a unique field or grouping of fields called a *key*.
- Keys are fields in tables that are used to uniquely identify a specific record (row) from all other records (rows) in the table.
 - Examples: Sales Order Number, Purchase Order Number, Employee ID
- A key for a table can be a single field in the table or a grouping of 2 or more fields. Multiple field keys are typically used in PeopleSoft Records.
 - Examples:
 - Business Unit + Sales Order Number
 - SetID + Item Number
 - SetID + Supplier ID + Address ID + Effective Date

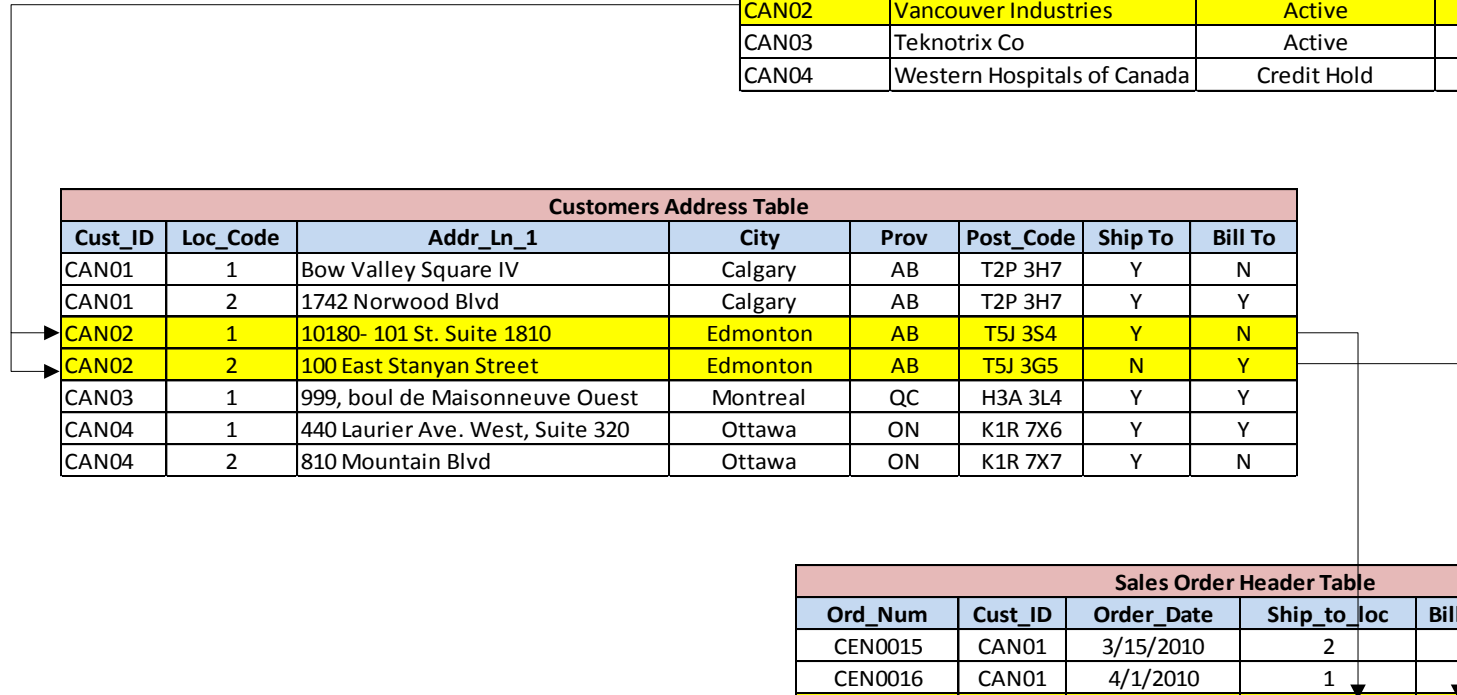
PeopleSoft Relational Database Structure – continued

Relational Database Example Sample Data

Customers Table			
Cust_ID	Cust_Name	Cust_status	Date_added
CAN01	Canadian High Tech Sports	Active	1/1/2010
CAN02	Vancouver Industries	Active	1/15/2010
CAN03	Teknotrix Co	Active	1/20/2010
CAN04	Western Hospitals of Canada	Credit Hold	1/20/2010

Customers Address Table							
Cust_ID	Loc_Code	Addr_Ln_1	City	Prov	Post_Code	Ship To	Bill To
CAN01	1	Bow Valley Square IV	Calgary	AB	T2P 3H7	Y	N
CAN01	2	1742 Norwood Blvd	Calgary	AB	T2P 3H7	Y	Y
CAN02	1	10180- 101 St. Suite 1810	Edmonton	AB	T5J 3S4	Y	N
CAN02	2	100 East Stanyan Street	Edmonton	AB	T5J 3G5	N	Y
CAN03	1	999, boul de Maisonneuve Ouest	Montreal	QC	H3A 3L4	Y	Y
CAN04	1	440 Laurier Ave. West, Suite 320	Ottawa	ON	K1R 7X6	Y	Y
CAN04	2	810 Mountain Blvd	Ottawa	ON	K1R 7X7	Y	N

Sales Order Header Table						
Ord_Num	Cust_ID	Order_Date	Ship_to_loc	Bill_to_loc	Order_Status	
CEN0015	CAN01	3/15/2010	2	2	Filled	
CEN0016	CAN01	4/1/2010	1	2	Open	
CEN0017	CAN02	4/15/2010	1	2	Filled	
CEN0018	CAN03	5/1/2010	1	1	Cancelled	



PeopleSoft Relational Database Structure – continued

➤ Other attributes of the PeopleSoft Relational Database

- Data is clearly defined within the record, so it can be cross checked and validated on entry to minimize errors.
- Data can be easily manipulated and retrieved in various ways using SQL. This manipulation can produce detailed queries and reports.
- Are designed in a manner to reduce redundancy by limiting the amount of occurrences that a single piece of data appears in multiple tables.
 - Saves disk space and speeds up system performance.
 - Example: Vendor ID stored in purchase order table rather than vendor name.
 - Allows for Vendor Name to be changed without losing integrity of transactional data...Vendor ID is static.

Lesson 3 – Creating a Simple Query (Single Record) – Using Query Manager

➤ Lesson Topics

1. Searching and Adding a Record
2. Searching and Selecting Fields
3. Running Simple Query and Export Results
4. Saving Queries and Query Properties

< Exercise 1 – Creating a Simple Query >

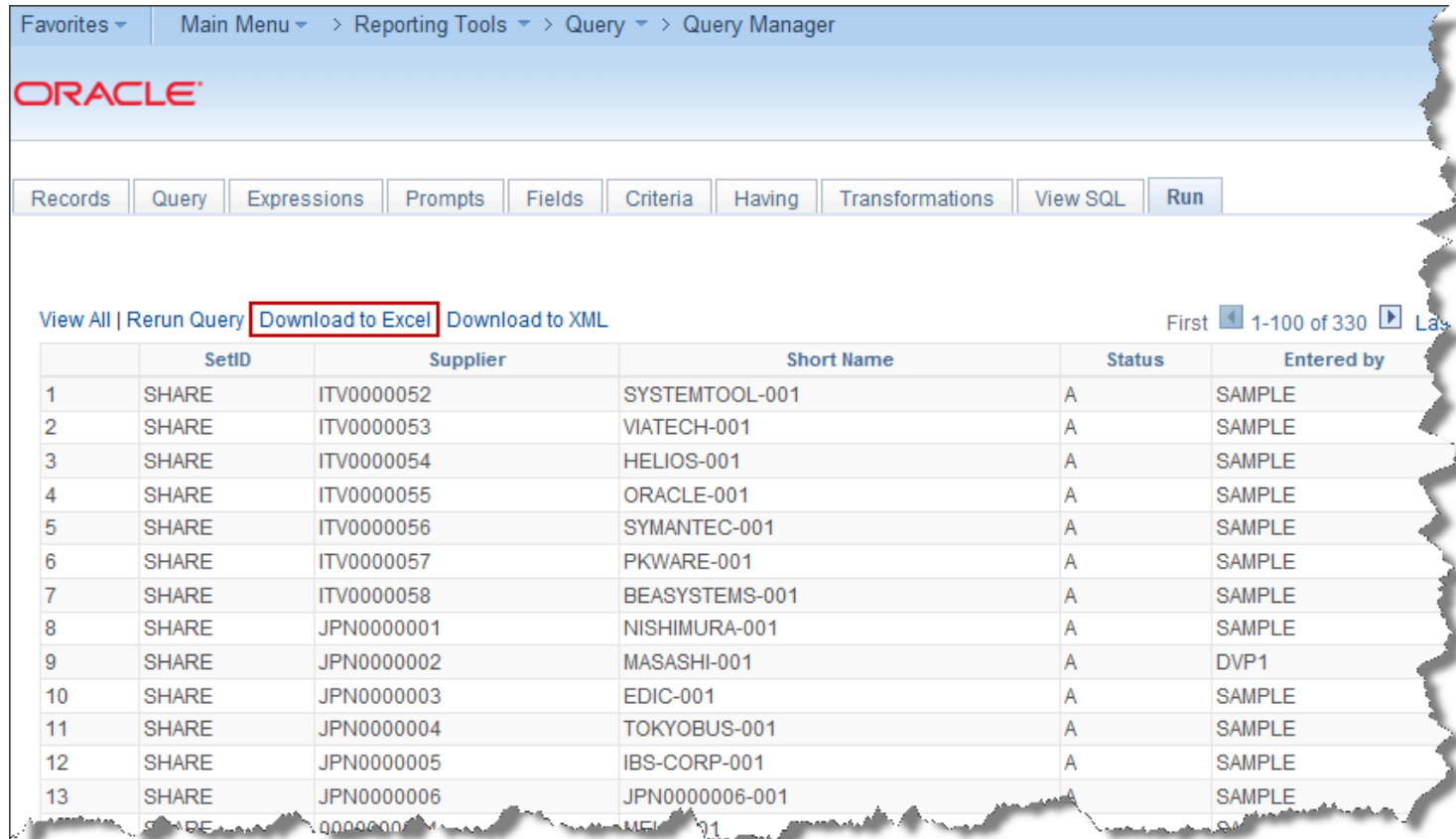
Student Exercise 1 – Creating a Simple Query

Creating a Simple Query – Vendor Listing

1. Login to PeopleSoft.
2. Navigate to PeopleSoft *Reporting Tools > Query > Query Manager*
3. Click on the [Create New Query](#) link.
4. In the *Description* field: Enter **VENDOR** and click on the [Search](#) link.
5. Click on the [Add Record](#) link beside the *VENDOR–Supplier Header Table* record.
6. Check the boxes beside the following fields: SETID, VENDOR_ID, VENDOR_NAME_SHORT, VENDOR_STATUS
7. Click on the [Find](#) link at the top of the field list.
8. Enter '**entered**' into the popup dialog box. The field ENTERED_BY should appear at the top of the list. Select the check box for this field.
9. Click on the [Save](#) button at the bottom of the page.
10. Enter a query name: **VENDOR_LIST_YourInitials**
11. Enter a description: **Sample Vendors**
12. Click [OK](#).
13. Click the [Run](#) tab at the top of the page.

Student Exercise 1 – Continued

Results should appear as below



Oracle Query Manager interface showing a table of results. The 'Download to Excel' link is highlighted with a red box.

	SetID	Supplier	Short Name	Status	Entered by
1	SHARE	ITV0000052	SYSTEMTOOL-001	A	SAMPLE
2	SHARE	ITV0000053	VIATECH-001	A	SAMPLE
3	SHARE	ITV0000054	HELIOS-001	A	SAMPLE
4	SHARE	ITV0000055	ORACLE-001	A	SAMPLE
5	SHARE	ITV0000056	SYMANTEC-001	A	SAMPLE
6	SHARE	ITV0000057	PKWARE-001	A	SAMPLE
7	SHARE	ITV0000058	BEASYSTEMS-001	A	SAMPLE
8	SHARE	JPN0000001	NISHIMURA-001	A	SAMPLE
9	SHARE	JPN0000002	MASASHI-001	A	DVP1
10	SHARE	JPN0000003	EDIC-001	A	SAMPLE
11	SHARE	JPN0000004	TOKYOBUS-001	A	SAMPLE
12	SHARE	JPN0000005	IBS-CORP-001	A	SAMPLE
13	SHARE	JPN0000006	JPN0000006-001	A	SAMPLE

14. Click on the [Download to Excel](#) link.
15. The query results will open in an Excel spreadsheet.

Lesson 4 – Modifying Results – Criteria and Filters (Simple Query)

➤ Lesson Topics

1. **Changing Column Order, Sorting Rows, Changing Field Names**

< Exercise 2 – Modifying Results >

2. **Simple Filtering (Criteria)**

< Exercise 3 – Filtering Report Results >

Demo of Modifying Results*

**Applicable only to live-classroom training!*

Student Exercise 2 – Modifying Results

Changing Column and Sort Order

1. While still in the *Vendor Listing* query, click on the [Query](#) tab.
2. Select the following additional field: **LAST_ACTIVITY_DT**
3. Select the [Fields](#) tab.
4. Click the [Reorder / Sort](#) button
5. Enter **1** in the *New Column* field for the ENTERED_BY field, enter **2** in the *New Column* field LAST_ACTIVITY_DT

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.

Edit Field Ordering Personalize | Find | View All | | First 1-6 of 6 Last

New Column	Column	Record.FieldName	Order By	Descending	New Order By
	1	A.SETID - SetID		<input type="checkbox"/>	
	2	A.VENDOR_ID - Supplier ID		<input type="checkbox"/>	
	3	A.VENDOR_NAME_SHORT - Short Supplier Name		<input type="checkbox"/>	
	4	A.VENDOR_STATUS - Supplier Status		<input type="checkbox"/>	
1	5	A.ENTERED_BY - Entered by		<input type="checkbox"/>	
2	6	A.LAST_ACTIVITY_DT - Last Activity Date		<input type="checkbox"/>	