2009

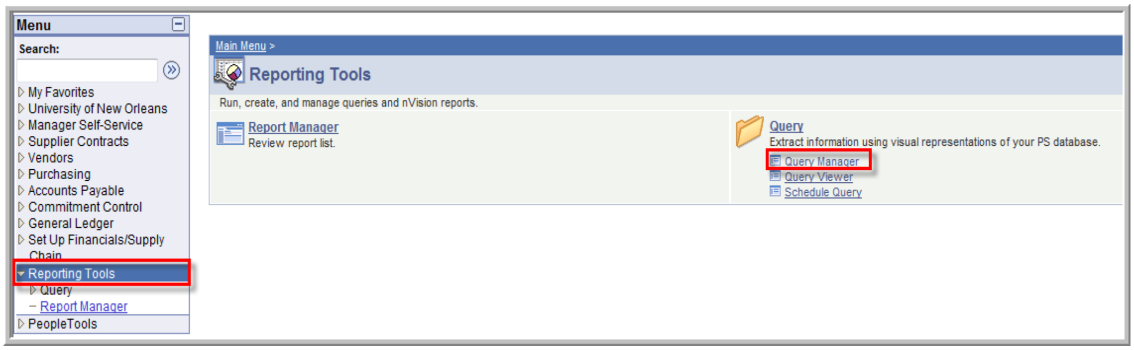
The University of New Orleans

PeopleSoft 9.0: Create a Query

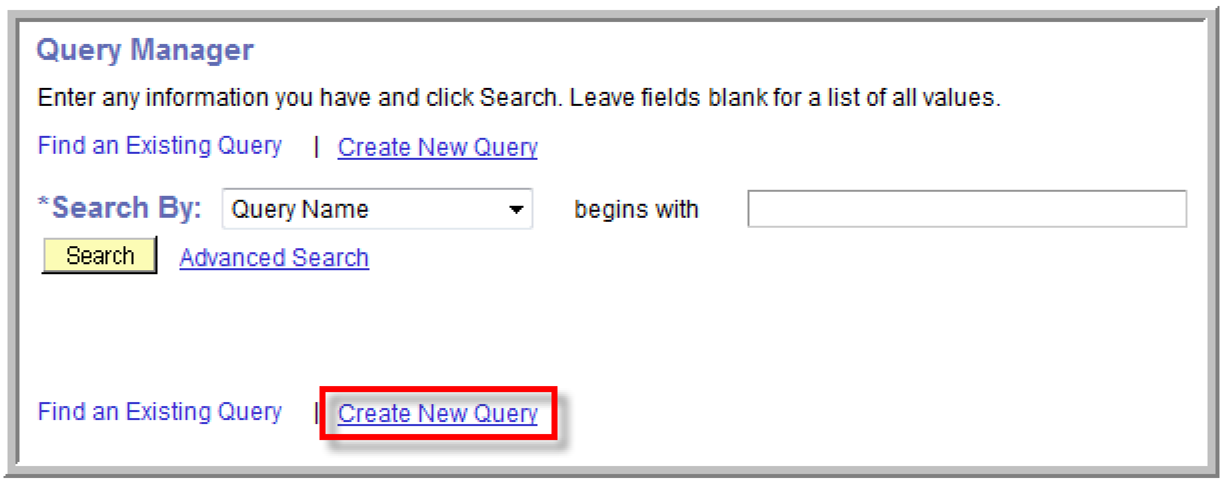
Training Group

Creating a Query

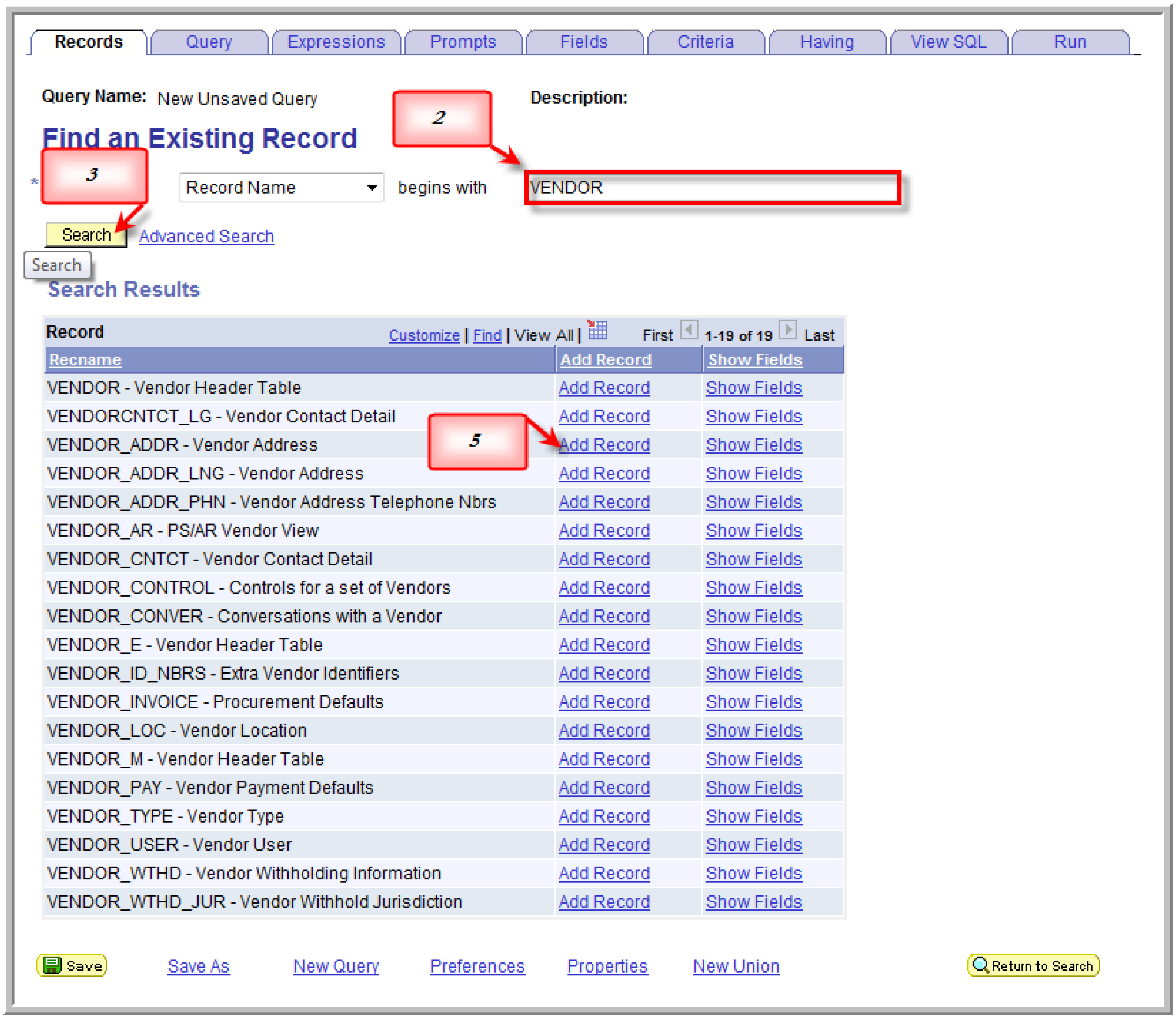
Navigation: Reporting Tools>Query Manager



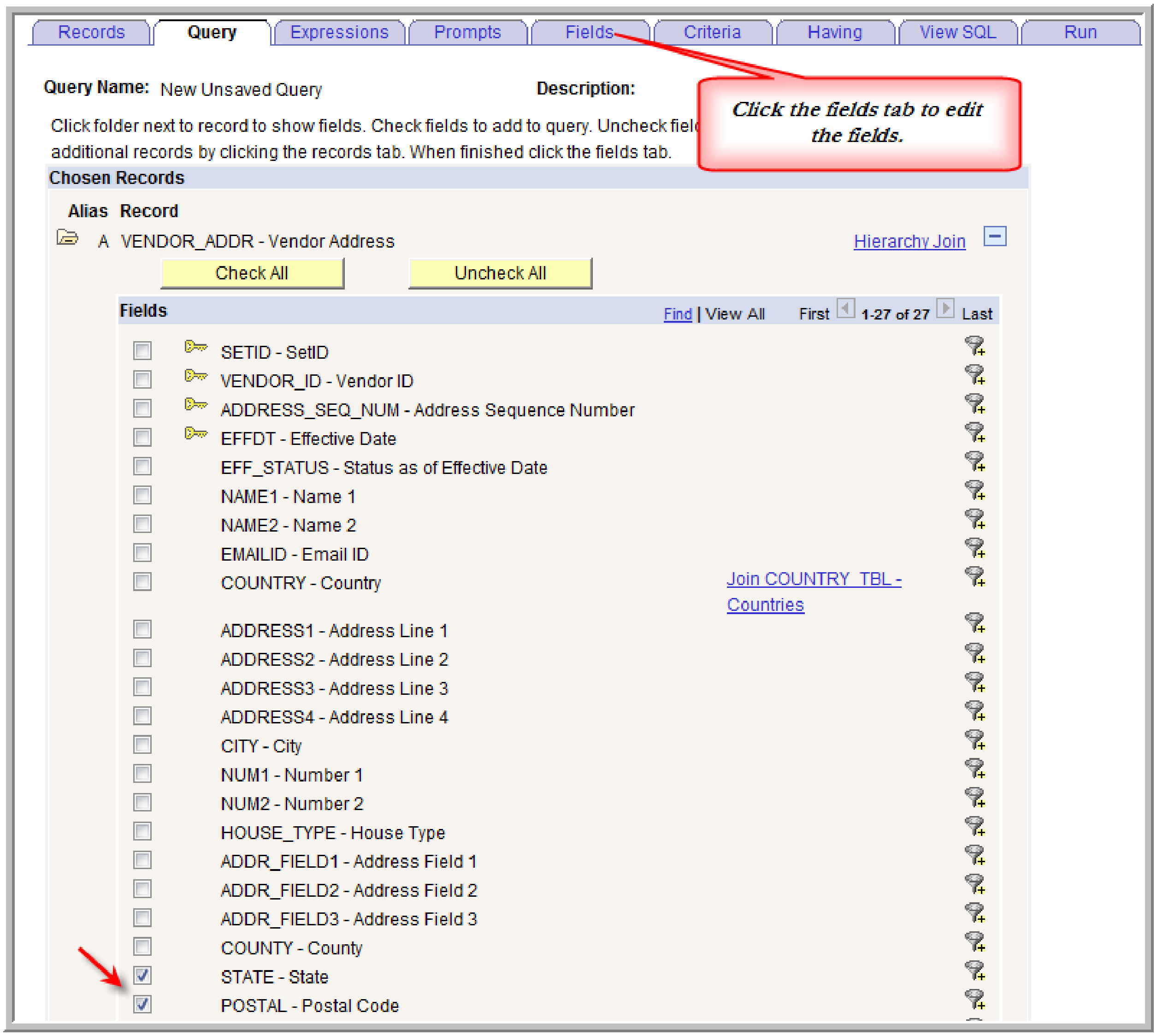
1. Click the Create a New Query link.



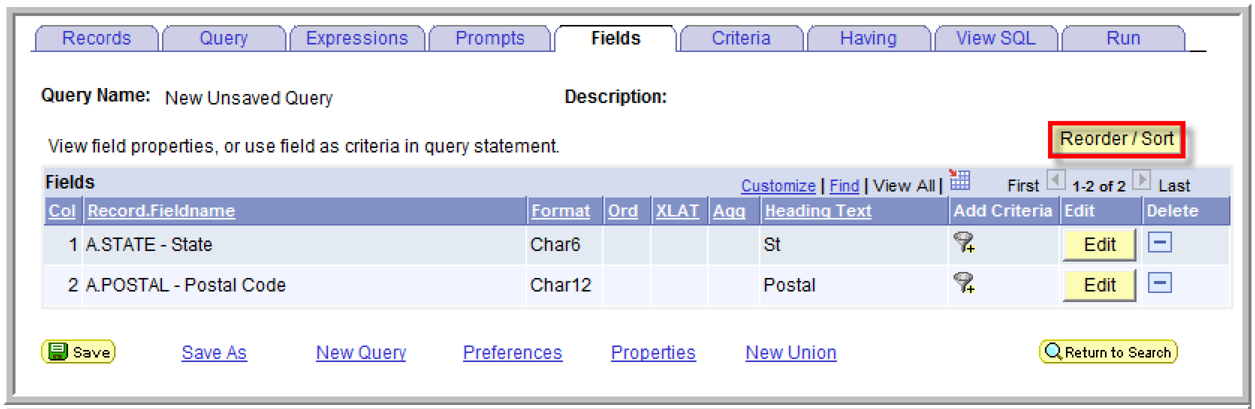
2. Search for an existing record to base your query from by typing a key word into the field.
3. Click the search button.
4. The key word you choose will determine the records in your search results.
5. Click the Add a record link.

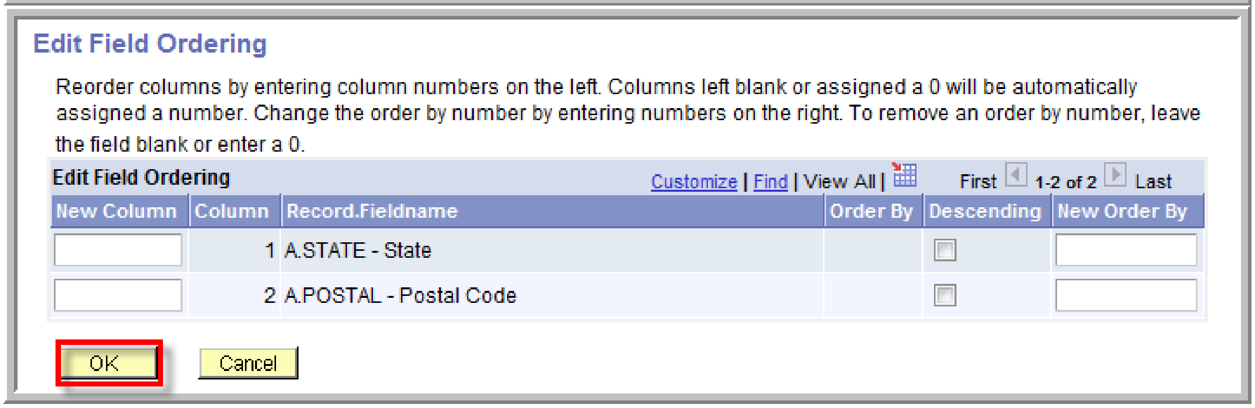


6. Several fields will be displayed. Add fields to your query by clicking the fields option next to the field name.
7. Click the fields tab to edit the fields.

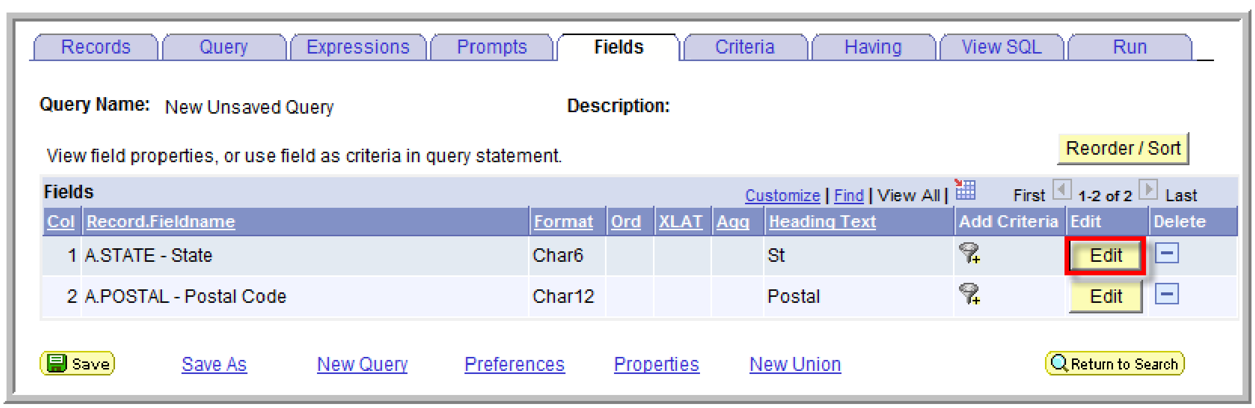


8. To reorder the field columns click the reorder/short button. Once you have set the order click the ok button.

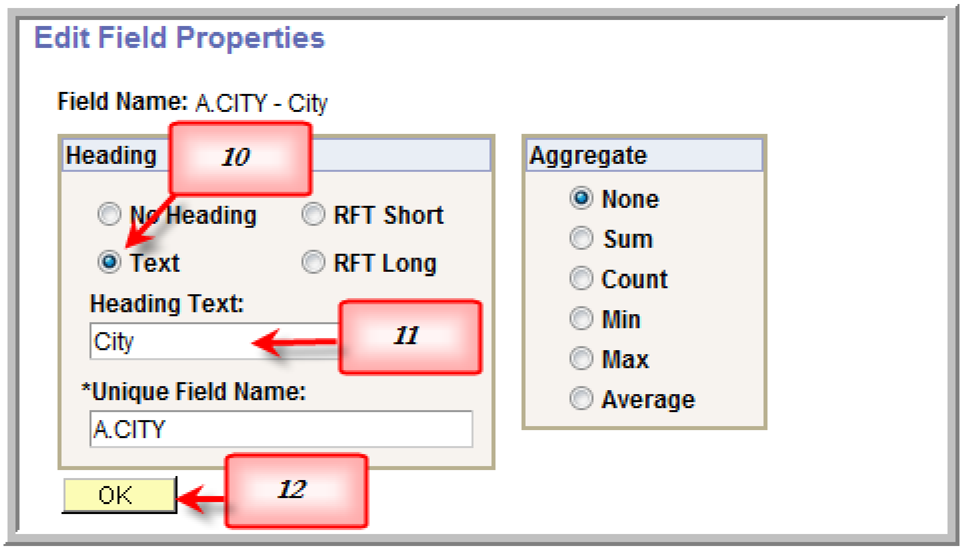




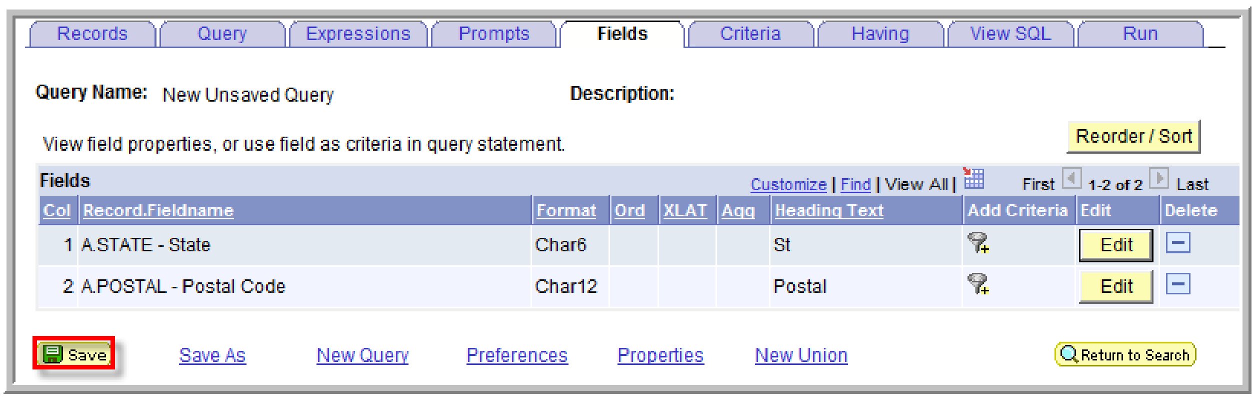
9. To change the column heading click the edit button.



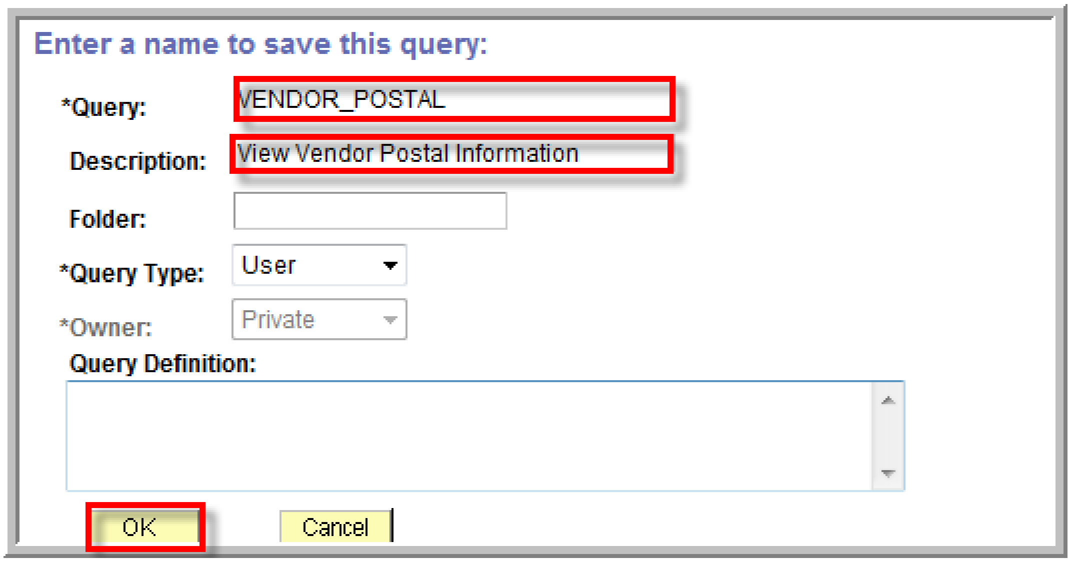
10. Click the text option.
11. Click on the heading field.
12. Enter desired information in the field and click ok.



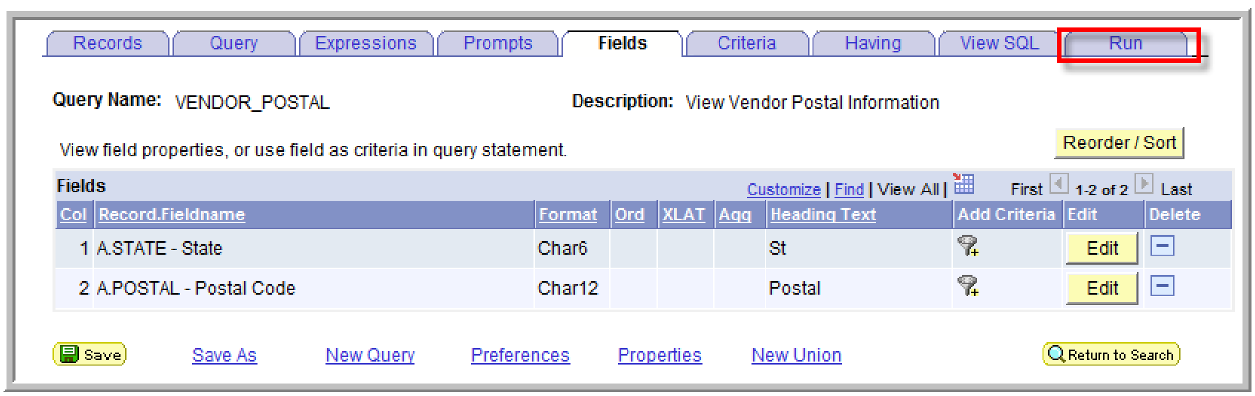
13. Click the save button.



14. Specify a name and description for your query.(The payment name may only contain letters, numbers and underscores.)
15. Click the ok button.



16. Click the run tab to run the query. To view the SQL click the View SQL tab.



17. To download the queries select the Download to Excel link.