

Basic Query Training

Office of Enrollment Services

March 7 & 9, 2017

Agenda

- Query Naming Conventions
- Query Searching
- Saving Favorites
- File of Popular Queries
- Running Queries
- Minor Query Modifications
- Helpful Excel Tools
- Requesting a New Query
- Demonstration

Query Naming Conventions

- 9_: Queries written for current PeopleSoft version
 - 8_ queries may not produce accurate results
- 9_AD: Admissions
- 9_SR: Student Records
- 9_SF: Student Accounts
- 9_IR: Institutional Research
- 9_FA: Financial Aid
- 9_HS: Housing
- 9_PROV: Provost


Query Naming Conventions

- Some users save queries built for their own use beginning with their initials: DMS_, KGW_, LJA, NMD, etc.
- Some users save queries built for their own use beginning with 9_ and then their initials: 9_DES, 9_DH
- Only public queries are viewable to all users
 - Private queries are available only to the owner
 - You must have appropriate query security to see public queries

Query Searching

- Navigation: Reporting Tools > Query > Query Manager

[Favorites](#) | [Main Menu](#) > [Reporting Tools](#) > [Query](#) > [Query Manager](#)

 *Cardinal Students* Hi Kevin!

Query Manager

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

[Find an Existing Query](#) | [Create New Query](#)

*Search By

Query Name ▼

Search

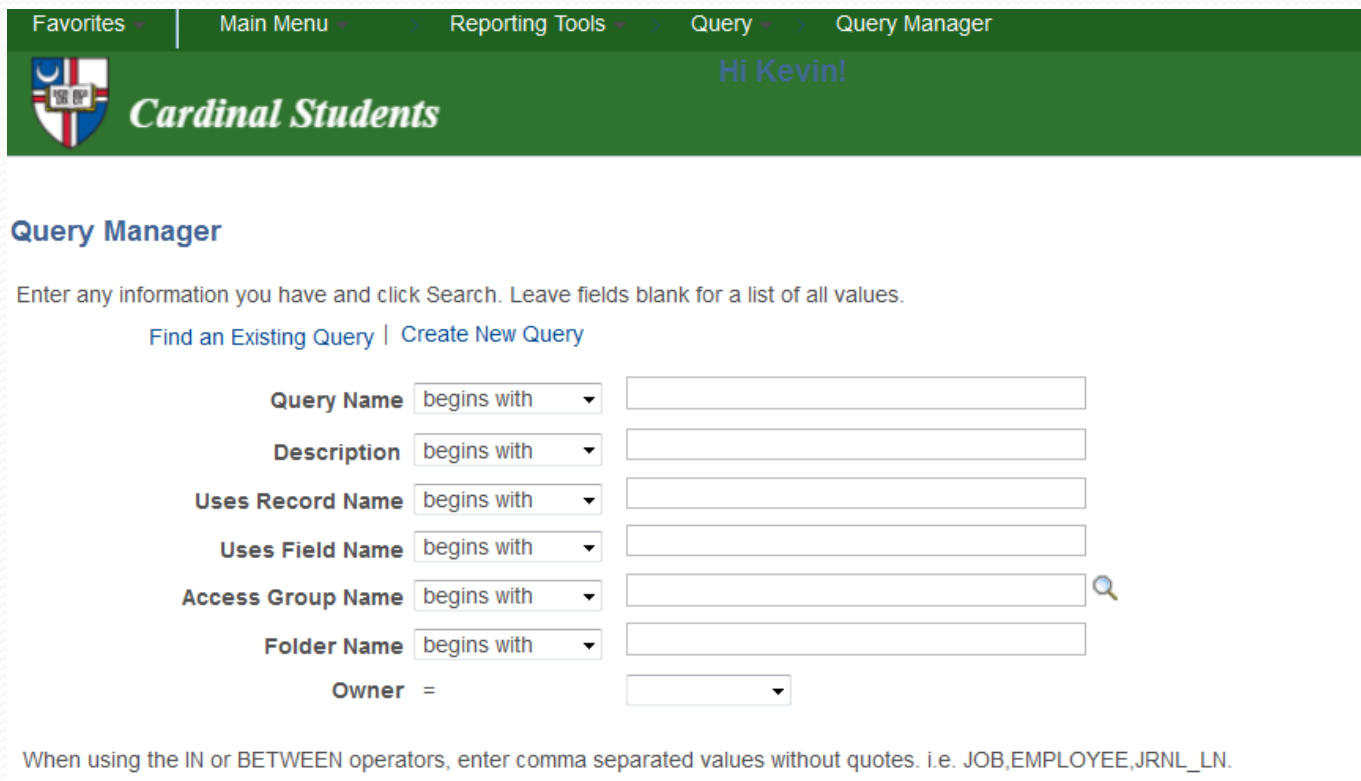
Advanced Search

begins with

[PDF File of CUA Public Queries](#)

Query Searching

- Click the Advanced Search Hyperlink to open multiple searching options.



The screenshot shows the 'Query Manager' page of the 'Cardinal Students' system. The top navigation bar includes links for 'Favorites', 'Main Menu', 'Reporting Tools', 'Query', and 'Query Manager'. A green header bar displays the 'Cardinal Students' logo and the text 'Hi Kevin!'. Below the header, the 'Query Manager' title is followed by instructions: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Two links, 'Find an Existing Query' and 'Create New Query', are provided. The search form contains several fields, each with a 'begins with' dropdown menu and a text input box: 'Query Name', 'Description', 'Uses Record Name', 'Uses Field Name', 'Access Group Name', and 'Folder Name'. An 'Owner' field is also present, consisting of an equals sign and a dropdown menu. A magnifying glass icon is located to the right of the 'Access Group Name' input box. At the bottom, a note states: 'When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.'

Query Manager

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

[Find an Existing Query](#) | [Create New Query](#)

Query Name begins with

Description begins with

Uses Record Name begins with

Uses Field Name begins with

Access Group Name begins with

Folder Name begins with

Owner =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

Query Searching

- Select the search modifier option to hone your search
 - you'll usually want to use “contains” on Query Name or Description
- Type the search text in the box
- Click Search

Helpful Hint: There are many student records queries that pull data on enrolled students. These start 9_SR_ENR. You may search for query name begins with or contains 9_SR_ENR



Query Manager

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

[Find an Existing Query](#) | [Create New Query](#)

Query Name	<input type="text" value="contains"/>	<input type="text" value="DEGREE"/>
Description	<input type="text" value="begins with"/>	<input type="text"/>
Uses Record Name	<input type="text" value="begins with"/>	<input type="text"/>
Uses Field Name	<input type="text" value="begins with"/>	<input type="text"/>
Access Group Name	<input type="text" value="begins with"/>	<input type="text"/>
Folder Name	<input type="text" value="begins with"/>	<input type="text"/>
Owner	=	<input type="text"/>



When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

Query Searching

- This example is to find a query that shows degrees awarded.
 - Using query name contains “degree” pulls all queries with degree in the name.
 - There are several Institutional Research queries and several Student Records queries – some school or department specific

<input type="checkbox"/>	9_IR_OFF_DEGREES	Completions Data Rev. S05	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_IR_OFF_DEGREES_10YEARS	Completions Data Rev. S05	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_IR_OFF_DEGREES_ADHC	Completions Data Rev. S05	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_IR_OFF_DEGREES_ENG	Completions Data Rev. for ENG	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_IR_OFF_DEGREES_NURU	Completions Data	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_IR_OFF_DEGREES_PHIL_REQ	Philosophy Degrees 20 yrs	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_IR_OFF_DEGREES_PHYS	Completions Data Rev. for PHYS	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_IR_OFF_DEGREES_SON	Completions Data Rev. S05	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_IR_OFF_DEGREES_WRK	Completions Data Rev. S05	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_IR_OFF_GAINFUL_DEGREES	Completions Data Rev. S05	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_IR_OFF_GAINFUL_DEGREES_EDCRT	Completions Data Rev. S05	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_MILL_DEGREE_CROSS_REF	Peoplesoft Millennium Crs Ref	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_QC_GRAD_DEGREE		Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_SR_ARCH_DEGREES	UGRD/GRAD One Comp Term	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_SR_BUSECON_DEGREES_AWARDED	Busn stdts degrees awarded	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_SR_DEGREES_AWARDED	Students with degrees awarded	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_SR_DEGREES_CURRENT_STUDENT	For Ana Lincoln	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_SR_METRO_DEGREES	For Susan Scully	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_SR_MSPS_DEGREE_STU_EMPLOYEES	For MSPS	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_SR_NCSSS_DOCTORAL_DEGREES	For range of completion terms	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_SR_PHIL_DEGREES_MILESTONES	PHIL degrees/milestone	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_SR_PSY_DEGREES	For Brian Nowlin	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_SR_TRS_DEGREES	For Abi Akintolayo	Public		Edit	HTML	Excel	XML	Schedule	Lookup References

Query Searching


- Performing the same kind of search using the “description” field may also be helpful
 - Sometimes a word may be abbreviated in the query name but spelled out in the description
 - Think broadly about what words might be used in query names and descriptions
 - For degrees awarded you may want to search “degree”, “comp” (for completion), “award,” “post” (for posted)







Query Manager

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

[Find an Existing Query](#) | [Create New Query](#)

Query Name	<input type="text" value="begins with"/>	<input type="text"/>
Description	<input type="text" value="contains"/>	<input type="text" value="DEGREE"/>
Uses Record Name	<input type="text" value="begins with"/>	<input type="text"/>
Uses Field Name	<input type="text" value="begins with"/>	<input type="text"/>
Access Group Name	<input type="text" value="begins with"/>	<input type="text"/> 
Folder Name	<input type="text" value="begins with"/>	<input type="text"/>
Owner	=	<input type="text"/>

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

Query										
Personalize Find View All   First  1-23 of 23  Last										
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References
<input type="checkbox"/>	9_AD_READMIT_DG_STDNTS_BY_TERM	Readmitted degree students	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_AD_READMIT_DG_STDNTS_FOR_FEE	Readmitted degree students	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_IR_OFF_DEGREES_PHIL_REQ	Philosophy Degrees 20 yrs	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_PROV_BIOTECH_ASGN	Biotech Non Degree Students	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_PROV_GRADS_BY_PROG_TYPE	Grads by Program & Degree Type	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_SR_BUSECON_DEGREES_AWARDED	Busn stdts degrees awarded	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_SR_CAR_SER_ACTIVE_STUDENTS	Activ students no nondegree	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_SR_DEGREES_AWARDED	Students with degrees awarded	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	9_SR_PHIL_DEGREES_MILESTONES	PHIL degrees/milestone	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	FISAP_ELIG_APP_UGRD_DEP_DEG	Elig Aplcnts Dep UG w/Degree	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	FISAP_ELIG_APP_UGRD_DEP_NO_DEG	Elig Aplcnts Dep UG No Degree	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	FISAP_ELIG_APP_UGRD_IND_DEG	Elig Aplcnts Ind UG w/Degree	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	FISAP_ELIG_APP_UGRD_IND_NO_DEG	Elig Aplcnts Ind UG no Degree	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	KGW_AUDIT_DEGREES_POSTED	Posted Degrees by term	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	KGW_BIOL_PHD_DEGREES_AWARDED	Students with degrees awarded	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	KGW_DEGREES_AWARDED_FERPA	degrees awarded with ferpa hol	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	KGW_DEGREES_POSTED	Posted Degrees by term	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	KGW_DEGREES_POSTED_SSN	Posted Degrees by term	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	KGW_DEGREE_HONORS	Degree Honors	Public		Edit	HTML	Excel	XML	Schedule	Lookup References

Saving Favorites

- You can save queries as favorites so they will appear on the main Query Manager page
- From search results, click the select box next to the query you want save as favorite
- In the *Action box choose Add to Favorites and click Go



Query Manager

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

[Find an Existing Query](#) |
 [Create New Query](#)

Query Name	contains	AWARDED
Description	begins with	
Uses Record Name	begins with	
Uses Field Name	begins with	
Access Group Name	begins with	
Folder Name	begins with	
Owner	=	

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

Search

Clear

Basic Search

[PDF File of CUA Public Queries](#)

Search Results

*Folder View -- All Folders --

Check All

Uncheck All

*Action Add to Favorites

Go

Query

[Personalize](#) |
 [Find](#) |
 [View All](#) |
 [Print](#) |
 [Help](#)

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input type="checkbox"/>	9_FA_PERKINS_AWARDED		Public		Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	9_FA_SEOG_AWARDED		Public		Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	9_SR_BUSECON_DEGREES_AWARDED	Busn stdts degrees awarded	Public		Edit	HTML	Excel	XML	Schedule
<input checked="" type="checkbox"/>	9_SR_DEGREES_AWARDED	Students with degrees awarded	Public		Edit	HTML	Excel	XML	Schedule

Saving Favorites

- The query is now included in the “My Favorite Queries” list



Query Manager

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

[Find an Existing Query](#) |
 [Create New Query](#)

*Search By

begins with

Search

[Advanced Search](#)

[PDF File of CUA Public Queries](#)

▼ My Favorite Queries

[Personalize](#) |
 [Find](#) |
 [?](#) |
 [|](#)

Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
9_ES_CREDIT_BALANCES	Credit Bal through prompt term	Public		Edit	HTML	Excel	XML	Schedule
9_ES_CREDIT_BALANCES_II	Credit Bal only prompt term	Public		Edit	HTML	Excel	XML	Schedule
9_ES_REFUNDS_NOCHG_SCHOLARSHIP	stu w/ book scholarships	Public		Edit	HTML	Excel	XML	Schedule
9_SF_ENRLD_STDT_NO_TUIT	SF Stud Enrolled No Tuition	Public		Edit	HTML	Excel	XML	Schedule
9_SF_REFUNDS_DATE_PRMP	Stud Refunds by Date	Public		Edit	HTML	Excel	XML	Schedule
9_SR_DEGREES_AWARDED	Students with degrees awarded	Public		Edit	HTML	Excel	XML	Schedule
KGW_CHARGES_NOT_PAID	charges in acct not paid	Public		Edit	HTML	Excel	XML	Schedule
KGW_PAYMENTS_PAID_WHAT	Charges Paid by Payments	Public		Edit	HTML	Excel	XML	Schedule
KGW_XFER_BALANCES_ISSUES	To audit transfer	Public		Edit	HTML	Excel	XML	Schedule

File of Popular Queries

- Tech Services compiled a spreadsheet of popular queries
- Use this as another source when searching for queries you may need
- Click the [PDF File of CUA Public Queries](#) hyperlink on the Query Manager page



Query Manager

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

[Find an Existing Query](#) |
 [Create New Query](#)

*Search By

Query Name

begins with

Search

[Advanced Search](#)

[PDF File of CUA Public Queries](#)

▼ My Favorite Queries

[Personalize](#)

Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML
9_ES_CREDIT_BALANCES	Credit Bal through prompt term	Public		Edit	HTML	Excel	XML
9_ES_CREDIT_BALANCES_II	Credit Bal only prompt term	Public		Edit	HTML	Excel	XML
9_ES_REFUNDS_NOCHG_SCHOLARSHIP	stu w/ book scholarshipships	Public		Edit	HTML	Excel	XML
9_SF_ENRLD_STDT_NO_TUIT	SF Stud Enrolled No Tuition	Public		Edit	HTML	Excel	XML
9_SF_REFUNDS_DATE_PRMP	Stud Refunds by Date	Public		Edit	HTML	Excel	XML
9_SR_DEGREES_AWARDED	Students with degrees awarded	Public		Edit	HTML	Excel	XML
KGW_CHARGES_NOT_PAID	charges in acct not paid	Public		Edit	HTML	Excel	XML
KGW_PAYMENTS_PAID_WHAT	Charges Paid by Payments	Public		Edit	HTML	Excel	XML
KGW_XFER_BALANCES_ISSUES	To audit transfer	Public		Edit	HTML	Excel	XML

[Clear Favorites List](#)

Instructions

This is a spreadsheet of popular Campus Solutions public queries, to help you find one that may be useful for your needs.

The nine worksheets are:

- 1- **[Admissions](#)** (queries for prospects or applicants)
- 2- **[Classes](#)** (queries related to catalog or class schedule)
- 3- **[Student Life](#)** (queries related to student life issues)
- 4- **[Students-All Schools and Depts](#)** (queries that select all schools and departments)
- 5- **[Students-Law School](#)** (queries for law school only)
- 6- **[Students-One Class](#)** (queries that prompt for one class number)
- 7- **[Students-One Dept](#)** (queries for one particular department -- see subheads)
- 8- **[Students-One School](#)** (queries for one particular school -- see subheads)
- 9- **[Students-Select Prog or Plan](#)** (queries that prompt for one program or plan)

Each query has a description, a list of prompt fields, a list of major print fields, special notes on selection, and which office originally requested it.

If you have any questions on existing queries, or need a new query written, please submit a ticket to Technology Services at techsupport@cua.edu. Queries starting with C_ or 8_ are obsolete; look for the same query as 9_. If one does not exist, please submit a ticket.

Running Queries

- Running query to HTML (so it appears in the Cardinal Students browser window)
 - From the search results page click the [HTML](#) hyperlink
 - After running to HTML you can download the results to Excel by clicking the [Excel Spreadsheet](#) hyperlink
- Running query directly to Excel (Excel will open and the results will display in a worksheet)
 - From the search results page click the [Excel](#) hyperlink

Query Manager

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

[Find an Existing Query](#) | [Create New Query](#)

*Search By

begins with

Search

[Advanced Search](#)

[PDF File of CUA Public Queries](#)

Search Results

*Folder View

Check All

Uncheck All

*Action

Go

Query										Personalize Find View All   First
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	
<input type="checkbox"/>	9_SR_DEGREES_AWARDED	Students with degrees awarded	Public		Edit	HTML	Excel	XML	Schedule	
<input type="checkbox"/>	9_SR_DEGREES_CURRENT_STUDENT	For Ana Lincoln	Public		Edit	HTML	Excel	XML	Schedule	

Minor Query Modifications

- You can save any public query as private for your use only
- In your private query, you can easily change the field order and sort order
- You can remove fields you don't need or add other fields if they are already in the tables used in the query

Minor Query Modifications

- Save as private
 - From search results click the [Edit](#) hyperlink

Query					Personalize F	
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML
<input type="checkbox"/>	9_SR_GRADE_DUMP_PLAN	Grades by Program/Plan	Public		Edit	HTML

Minor Query Modifications

- Click the [Save As](#) hyperlink

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

Query Name 9_SR_GRADE_DUMP_PLAN Description Grades by Program/Plan Feed

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

Fields Personalize Find View All First 1-13 of 13 Last

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.EMPLID - Empl ID	Char11				ID		Edit	-
2	F.NAME - Name	Char50	1			Name		Edit	-
3	E.ACAD_LEVEL_BOT - Academic Level - Term Start	Char3				Strt Level		Edit	-
4	C.ACAD_PROG - Academic Program	Char5				Acad Prog		Edit	-
5	D.ACAD_PLAN - Academic Plan	Char10				Acad Plan		Edit	-
6	A.SUBJECT - Subject Area	Char8				Subject		Edit	-
7	A.CATALOG_NBR - Catalog Nbr	Char10				Catalog		Edit	-
8	A.DESCR - Description	Char30				Descr		Edit	-
9	A.UNT_TAKEN - Units Taken	Num4.2				Unit Taken		Edit	-
10	A.CRSE_GRADE_INPUT - Grade Input	Char3				Grade In		Edit	-
11	A.CRSE_GRADE_OFF - Official Grade	Char3				Grade		Edit	-
12	E.CUM_GPA - Cumulative GPA	Num6.3				Cum GPA		Edit	-
13	E.CUR_GPA - Current GPA	Num6.3				Current GPA		Edit	-

Save **Save As** New Query Preferences Properties Publish as Feed Publish as Pivot Grid New Union

Minor Query Modifications

- Change the name – you may want to just add your initials to the beginning of the query name or replace the “9” with your initials
- Change the Description if you wish
- You should only have the option of “Private” in the *Owner box
 - If you have Public as an option NEVER over-write an existing public query – select Private
- Click OK

Favorites ▾

Main Menu ▾

> Reporting Tools ▾

> Query ▾

> Query Manager



Cardinal Students

Hi Kevin!

Enter a name to save this query as:

*Query

Description

Folder

*Query Type

*Owner

Query Definition:

OK

Cancel

Minor Query Modifications

- Adding or deleting fields from the output
 - Click the Query tab

The screenshot shows a query editor interface with a tabbed menu at the top. The 'Query' tab is highlighted with a red rectangle. Below the tabs, the 'Query Name' is 'KGW_SR_GRADE_DUMP_PLAN' and the 'Description' is 'Grades by Program/Plan'. A 'Feed' icon is visible on the right. Below this, there is a text instruction: '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.' Below the instruction is a section titled 'Chosen Records' containing a table with columns 'Alias' and 'Record'. The table lists five records (A through F) with their respective table names and a 'Hierarchy Join' button next to each. At the bottom of the 'Chosen Records' section are two buttons: 'Expand All Records' and 'Collapse All Records'. At the very bottom of the interface are several action buttons: 'Save', 'Save As', 'New Query', 'Preferences', 'Properties', 'Publish as Feed', 'Publish as Pivot Grid', and 'New Union'.

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

Query Name KGW_SR_GRADE_DUMP_PLAN **Description** Grades by Program/Plan Feed

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	
A	CLASS_TBL_SE_VW - Class Table Student Enrl View	Hierarchy Join
C	ACAD_PROG - Student Academic Program	Hierarchy Join
D	ACAD_PLAN - Student Academic Plan Table	Hierarchy Join
E	STDNT_CAR_TERM - Student Career Term Table	Hierarchy Join
F	CX_NAMES	Hierarchy Join

Expand All Records Collapse All Records

Save Save As New Query Preferences Properties Publish as Feed Publish as Pivot Grid New Union


Minor Query Modifications

- The records used in the query display
- Click the + next to the record to see all the fields available in that record (fields already in the query will be selected with a check mark)
- To remove a field from the query uncheck the select box
- To add a field to the query check the select box next to that field.

Minor Query Modifications


- In this example we added CLASS_SECTION


Records Query Expressions Prompts Fields Criteria Having Dependency Transformations View SQL Run

Query Name KGW_SR_GRADE_DUMP_PLAN Description Grades by Program/Plan  Feed
















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
 A	CLASS_TBL_SE_VW - Class Table Student Enrl View

[Hierarchy Join](#) 

Fields Find | View All First 1-50 of 74 Last

<input checked="" type="checkbox"/>	 EMPLID - Empl ID	
<input type="checkbox"/>	 ACAD_CAREER - Academic Career	
<input type="checkbox"/>	 INSTITUTION - Academic Institution	
<input type="checkbox"/>	 STRM - Term	
<input type="checkbox"/>	 CLASS_NBR - Class Nbr	
<input type="checkbox"/>	ACAD_GROUP - Academic Group	
<input checked="" type="checkbox"/>	SUBJECT - Subject Area	
<input checked="" type="checkbox"/>	CATALOG_NBR - Catalog Nbr	
<input type="checkbox"/>	SESSION_CODE - Session	
<input checked="" type="checkbox"/>	CLASS_SECTION - Class Section	

Join INSTITUTION_TBL - Institution Table
Join TERM_TBL - Term Definition Table
Join ACAD_GROUP_TBL - Academic Group Table
Join SUBJECT_TBL - Subject Table

Minor Query Modifications

- Any added fields will appear at the far right of the query results
- Field location can be changed on the Fields tab.

Records

Query

Expressions

Prompts

Fields

Criteria

Having

Dependency

Transformations

View SQL











































Run

Query Name KGW_SR_GRADE_DUMP_PLAN**Description** Grades by Program/Plan Feed ▾

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

Reorder / Sort

FieldsPersonalize | Find | View All |   First  1-14 of 14  Last

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.EMPLID - Empl ID	Char11				ID		 Edit	
2	F.NAME - Name	Char50	1			Name		 Edit	
3	E.ACAD_LEVEL_BOT - Academic Level - Term Start	Char3				Strt Level		 Edit	
4	C.ACAD_PROG - Academic Program	Char5				Acad Prog		 Edit	
5	D.ACAD_PLAN - Academic Plan	Char10				Acad Plan		 Edit	
6	A.SUBJECT - Subject Area	Char8				Subject		 Edit	
7	A.CATALOG_NBR - Catalog Nbr	Char10				Catalog		 Edit	
8	A.DESCR - Description	Char30				Descr		 Edit	
9	A.UNT_TAKEN - Units Taken	Num4.2				Unit Taken		 Edit	
10	A.CRSE_GRADE_INPUT - Grade Input	Char3				Grade In		 Edit	
11	A.CRSE_GRADE_OFF - Official Grade	Char3				Grade		 Edit	
12	E.CUM_GPA - Cumulative GPA	Num6.3				Cum GPA		 Edit	
13	E.CUR_GPA - Current GPA	Num6.3				Current GPA		 Edit	
14	A.CLASS_SECTION - Class Section	Char4				Section		 Edit	

Save

Save As

New Query

Preferences

Properties

Publish as Feed

Publish as Pivot Grid





New Union

Minor Query Modifications

- Click Reorder/Sort
- To change the location of the field, enter the location number in the New Column field
 - In the example we are moving the newly added CLASS_SECTION field from column 14 to column 8
- To change the sort order of the output, enter the sort order in the New Order By field
 - You can enter multiple sort orders – in the example we sort first by NAME, then by SUBJECT, then by CATALOG_NBR
- Click OK

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  1-14 of 14  Last

New Column	Column	Record.FieldName	Order By	Descending	New Order By
<input type="text"/>	1	A.EMPLID - Empl ID		<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	2	F.NAME - Name	1	<input type="checkbox"/>	<input type="text" value="1"/>
<input type="text"/>	3	E.ACAD_LEVEL_BOT - Academic Level - Term Start		<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	4	C.ACAD_PROG - Academic Program		<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	5	D.ACAD_PLAN - Academic Plan		<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	6	A.SUBJECT - Subject Area		<input type="checkbox"/>	<input type="text" value="2"/>
<input type="text"/>	7	A.CATALOG_NBR - Catalog Nbr		<input type="checkbox"/>	<input type="text" value="3"/>
<input type="text"/>	8	A.DESCR - Description		<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	9	A.UNT_TAKEN - Units Taken		<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	10	A.CRSE_GRADE_INPUT - Grade Input		<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	11	A.CRSE_GRADE_OFF - Official Grade		<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	12	E.CUM_GPA - Cumulative GPA		<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	13	E.CUR_GPA - Current GPA		<input type="checkbox"/>	<input type="text"/>
<input type="text" value="8"/>	14	A.CLASS_SECTION - Class Section		<input type="checkbox"/>	<input type="text"/>

Minor Query Modifications

- If the query does not have prompts, it may be hard coded with criteria that doesn't meet your needs, e.g. it may be coded for a term that has passed
- Click the Criteria tab

Query Name 9_IR_OFF_DEGREES_ENG

Description Completions Data Rev. for ENG



Add Criteria






Group Criteria

Reorder Criteria

Criteria					
Personalize Find					
		First		1-24 of 24	
				Last	
Logical	Expression1	Condition Type	Expression 2	Edit	Delete
<div></div>	A.COMPLETION_TERM - Completion Term	between	0905 AND 1161	Edit	<div></div>
AND	A.EMPLID - Empl ID	equal to	B.EMPLID - Empl ID	Edit	<div></div>
AND	A.EMPLID - Empl ID	equal to	C.EMPLID - Empl ID	Edit	<div></div>
AND	A.EMPLID - Empl ID	equal to	D.EMPLID - Empl ID	Edit	<div></div>
AND	A.STDNT_DEGR - Student Degree Nbr	equal to	D.STDNT_DEGR - Student Degree Nbr	Edit	<div></div>
AND	D.ACAD_PLAN - Academic Plan	equal to	E.ACAD_PLAN - Academic Plan	Edit	<div></div>
AND	E.EFFDT - Effective Date	Eff Date <=	Current Date	Edit	<div></div>
AND	E.ACAD_PLAN - Academic Plan	in list	('ENGL-MAPHD','ENGL-PHD')	Edit	<div></div>
AND	D.EMPLID - Empl ID	equal to	F.EMPLID(+)	Edit	<div></div>
AND	D.STDNT_DEGR - Student Degree Nbr	equal to	F.STDNT_DEGR(+)	Edit	<div></div>
AND	D.ACAD_PLAN - Academic Plan	equal to	F.ACAD_PLAN(+)	Edit	<div></div>

Minor Query Modifications

- This example shows the query is pulling only students who graduated between terms 0905 and 1161
 - You can edit that criteria (change the results terms)
 - Click the Edit box

Criteria					Personalize Find  		First 	1-24 of 24	 Last
Logical	Expression1	Condition Type	Expression 2	Edit	Delete				
<input type="text"/>	A.COMPLETION_TERM - Completion Term	between	0905 AND 1161	<div>Edit</div>					

Edit Criteria Properties

Choose Expression 1 Type

- ☒ Field
☐ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname



A.COMPLETION_TERM - Completion

*Condition Type between

Choose Expression 2 Type

- ☒ Const - Const
☐ Const - Field
☐ Const - Expr
☐ Field - Const
☐ Field - Field
☐ Field - Expr
☐ Expr - Const
☐ Expr - Field
☐ Expr - Expr

Expression 2

Define Constant

Constant



Define Constant 2

Constant 2



OK

Cancel

Minor Query Modifications

- Update the terms in the Expression 2 box and click OK

Edit Criteria Properties

Choose Expression 1 Type

- ☒ Field
- ☐ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname

A.COMPLETION_TERM - Completion

*Condition Type between

Choose Expression 2 Type

- ☒ Const - Const
- ☐ Const - Field
- ☐ Const - Expr
- ☐ Field - Const
- ☐ Field - Field
- ☐ Field - Expr
- ☐ Expr - Const
- ☐ Expr - Field
- ☐ Expr - Expr

Expression 2

Define Constant

Constant

Define Constant 2

Constant 2

OK

Cancel

Minor Query Modifications

- There are various options in the Condition Type. Most often used are:
 - Equal to
 - Not equal to
 - Greater than
 - Not greater than
 - Between

Minor Query Modifications

- NOTE: Normally when two records are joined in a query, the student must have data in both of those tables or he will not be pulled in the query
 - For example, if the academic plan and academic sub plan tables are joined in the normal way, only students who have both plans and sub-plans will be pulled by the query
- If you see (+) after a field in the criteria, this means if the student exists on the first record, he will still be included even if he doesn't exist on the second record

Minor Query Modifications

- In the example below G is the academic plan table and H is the academic sub-plan table
- The (+) on H will allow students with no sub-plan to be displayed in the query results

AND ▼	G.EMPLID - Empl ID	equal to	H.EMPLID(+)
AND ▼	G.EFFDT - Effective Date	equal to	H.EFFDT(+)
AND ▼	G.EFFSEQ - Effective Sequence	equal to	H.EFFSEQ(+)

Minor Query Modifications

- After you have made all modifications you want, click Save
- Click the Run tab to run your query
- If there are prompts in the query the prompt box will open
- Enter the appropriate values and click OK

RecordsQueryExpressionsPromptsFieldsCriteriaHavingDependencyTransformationsView SQLRun

Query NameKGW_SR_GRADE_DUMP_PLANDescriptionGrades by Program/PlanFeed

View field properties; or use field as criteria in query statement.Reorder / Sort

FieldsPersonalizeFindView AllFirst1-14 of 14Last

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.EMPLID - Empl ID	Char11						Edit	-
2	F.NAME - Name	Char50	1					Edit	-
3	E.ACAD_LEVEL_BOT - Academic Level - Term Start	Char3						Edit	-
4	C.ACAD_PROG - Academic Program	Char5						Edit	-
5	D.ACAD_PLAN - Academic Plan	Char10						Edit	-
6	A.SUBJECT - Subject Area	Char8	2					Edit	-
7	A.CATALOG_NBR - Catalog Nbr	Char10	3					Edit	-
8	A.CLASS_SECTION - Class Section	Char4						Edit	-
9	A.DESCR - Description	Char30						Edit	-
10	A.UNT_TAKEN - Units Taken	Num4.2						Edit	-
11	A.CRSE_GRADE_INPUT - Grade Input	Char3				Grade In		Edit	-
12	A.CRSE_GRADE_OFF - Official Grade	Char3				Grade		Edit	-
13	E.CUM_GPA - Cumulative GPA	Num6.3				Cum GPA		Edit	-
14	E.CUR_GPA - Current GPA	Num6.3				Current GPA		Edit	-

KGW_SR_GRADE_DUMP_PLAN

Academic Institution:CRDNL

Term:1168

Academic Program:MUSU

Academic Plan:MUSIC-BA

OKCancel

SaveSave AsNew QueryPreferencesPropertiesPublish as FeedPublish as Pivot GridNew Union

Minor Query Modifications

- If there are more than 100 rows returned, you can click the [View All](#) hyperlink to have all rows appear in one scrolling page or you can use the left and right arrows on the right side of the page to navigate through the results
- Click the [Download to Excel](#) hyperlink to download the results to an Excel worksheet

Records

Query

Expressions

Prompts

Fields

Criteria

Having

Dependency

Transformations

View SQL

Run

Academic Institution = CRDNL,Term=1168,Academic Program=MUSU,Academic Plan=MUSIC-BA

View All

Rerun Query

Download to Excel

Download to XML

First

1-100 of 279

Last

ID	Name	Strt Level	Acad Prog	Acad Plan	Subject	Catalog	Section	Descr	Unit Taken	Grade In	Grade	Cum GPA	Current GPA
----	------	------------	-----------	-----------	---------	---------	---------	-------	------------	----------	-------	---------	-------------

Helpful Excel Tools

- How to retrieve missing leading zeros
 - Sometimes the leading zeros in student IDs or course numbers may disappear when query is run to Excel
- Vlookup
 - Used to compare two Excel worksheets to identify when a field on one worksheet matches a field in another
- Converting text to numbers
 - Especially helpful for Vlookup – PeopleSoft downloads numbers to Excel as text

Helpful Excel Tools

- Missing leading zeros
 - Example is for student ID that is missing leading 0, e.g. 0601234 displays as 601234
 - Highlight the ID column
 - Right click and select format cells
 - Select Custom
 - On the right side select 0
 - In the Type field enter 0000000 (seven zeros)
 - Click OK

ID before

	A
1	ID
2	601234
3	601235
4	601236
5	601237

ID after

	A
1	ID
2	0601234
3	0601235
4	0601236
5	0601237

Format Cells

Number Alignment Font Border Fill Protection

Category:

General
Number
Currency
Accounting
Date
Time
Percentage
Fraction
Scientific
Text
Special
Custom

Sample
0601234

Type:
0000000

General
0.00
#,##0
#,##0.00
#,##0_);(,##0)
#,##0_);[Red](,##0)
#,##0.00_);(,##0.00)
#,##0.00_);[Red](,##0.00)
\$#,##0_);(\$,##0)
\$#,##0_);[Red](\$,##0)

Delete

Type the number format code, using one of the existing codes as a starting point.

OK Cancel

Helpful Excel Tools

- Vlookup
 - Example is find out who on spreadsheet two exists on spreadsheet one
 - For best results, put compare data in Column A on both spreadsheets
 - Sort both spreadsheets in the same order, e.g., when comparing based on student IDs, sort both spreadsheets by ID smallest to largest

Spreadsheet 1

	A	B
1	ID	Name
2	1001111	Smith, John
3	1002121	Jones, Jane
4	1003542	Johnson, Peter
5	1006544	Harold, James

Spreadsheet 2

	A	B
1	ID	Name
2	1001111	Smith, John
3	1003542	Johnson, Peter
4	2001234	Capaldi, Peter
5	2002345	Lupino, Jessica

Helpful Excel Tools

- Label the first empty column (C in this example) as your compare column, e.g. enter heading “Match”

	A	B	C
1	ID	Name	Match
2	1001111	Smith, John	
3	1002121	Jones, Jane	
4	1003542	Johnson, Peter	
5	1006544	Harold, James	

Helpful Excel Tools

- Click Cell C2
- Type =Vlookup
- Click on Cell A2
- Type a comma (,)
- Tap the space bar

	A	B	C
1	ID	Name	Match
2	1001111	Smith, John	=VLOOKUP(A2,
3	1002121	Jones, Jane	
4	1003542	Johnson, Peter	
5	1006544	Harold, James	

Helpful Excel Tools

- Click the first data cell in your second spreadsheet (do not click on the title row)
- Hold down the Ctrl and Shift keys and use the down and right arrows to highlight all data rows (or click and drag to highlight all data rows)

	A	B
1	ID	Name
2	1001111	Smith, John
3	1003542	Johnson, Peter
4	2001234	Capaldi, Peter
5	2002345	Lupino, Jessica

Helpful Excel Tools

- Click back on the first spreadsheet
- Note additional parameters have been added to your Vlookup formula

	A	B	C	D	E	F
1	ID	Name	Match			
2	1001111	Smith, John	=VLOOKUP(A2, [Vlookup2.xlsx]Sheet1!\$A\$2:\$B\$5			
3	1002121	Jones, Jane				
4	1003542	Johnson, Peter				
5	1006544	Harold, James				

Helpful Excel Tools

- Type a comma (,)
- Tap the space bar
- Type the column number from the second spreadsheet that holds the data you will pull into spreadsheet one (in this example column 1 – ID)
- Type a comma (,)
- Tap the space bar
- Type FALSE)
- Click Enter

	A	B	C	D	E	F	G
1	ID	Name	Match				
2	1001111	Smith, John	=VLOOKUP(A2, [Vlookup2.xlsx]Sheet1!\$A\$2:\$B\$5, 1, FALSE)				
3	1002121	Jones, Jane					
4	1003542	Johnson, Peter					
5	1006544	Harold, James					

Helpful Excel Tools

- Click the formula cell (in this example C2)
- Click on the black square at the bottom right of the cell border and drag the formula down to the bottom row

	A	B	C
1	ID	Name	Match
2	1001111	Smith, John	1001111
3	1002121	Jones, Jane	#N/A
4	1003542	Johnson, Peter	1003542
5	1006544	Harold, James	#N/A

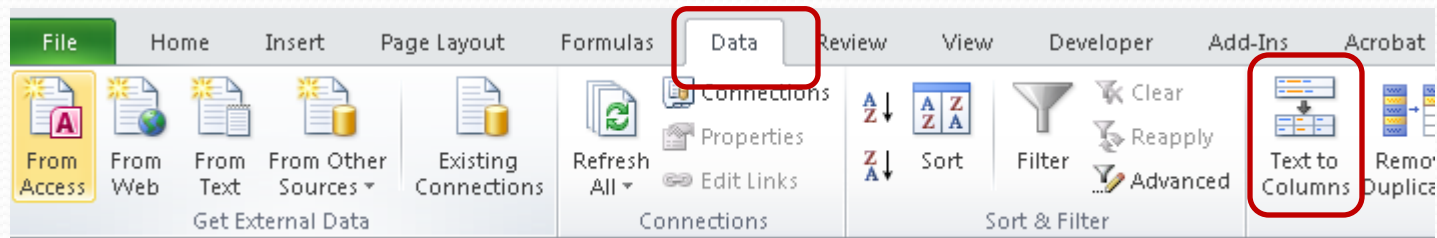
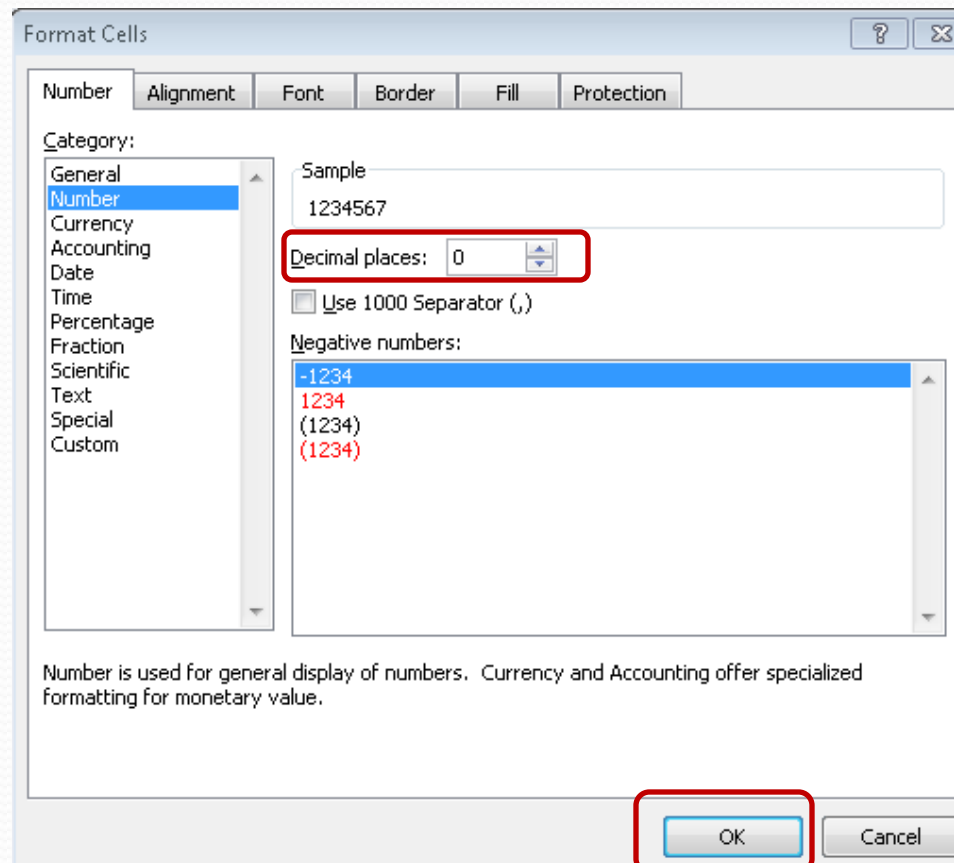
Helpful Excel Tools

- Your match column will be highlighted
- Right click and select copy
- Right click and select Paste Values (the folder icon with 123 written on it)
 - You must do this to convert the formula into the actual values
- Students who existed in spreadsheet two that are also in spreadsheet one will have the ID displayed
- Students who existed in spreadsheet one but were not in spreadsheet two will have #N/A listed

Helpful Excel Tools

- Convert text to numbers
 - If there are numbers in your data field but you see a small green wedge in the upper left corner of the field, this means the field is actually formatted as text
 - Select the column
 - Right click and select format cells
 - Choose number and set the decimal places appropriately (0 for ID numbers)
 - Click OK
 - Click the Data tab
 - Click Text to Columns
 - Click Finish

ID	Name (LN, FN)	Career	Acad Prog	Acad Plan
1234567		GRAD	MUSG	MUSIC-DMA
2345678		GRAD	MUSG	MUSIC-DMA
3567890		GRAD	MUSG	MUSIC-DMA
1237894		GRAD	MUSG	MUSIC-DMA
4569871		GRAD	MUSG	MUSIC-DMA



Convert Text to Columns Wizard - Step 1 of 3

The Text Wizard has determined that your data is Delimited.

If this is correct, choose Next, or choose the data type that best describes your data.

Original data type

Choose the file type that best describes your data:

- ☒ **Delimited** - Characters such as commas or tabs separate each field.
- ☐ **Fixed width** - Fields are aligned in columns with spaces between each field.

Preview of selected data:

2	1234567
3	2345678
4	3567890
5	1237894
6	4569871

Cancel

< Back

Next >

Finish

	A	B	C	D	E
1	ID	Name (LN, FN)	Career	Acad Prog	Acad Plan
2	1234567		GRAD	MUSG	MUSIC-DMA
3	2345678		GRAD	MUSG	MUSIC-DMA
4	3567890		GRAD	MUSG	MUSIC-DMA
5	1237894		GRAD	MUSG	MUSIC-DMA
6	4569871		GRAD	MUSG	MUSIC-DMA

Notice the green wedges are gone and the numbers are right justified. This shows you they have been converted

Requesting a New Query

- If there is not an existing query that will meet your needs, send an email to cua-techsupport@cua.edu to request a new query
 - Remember the data you need must exist in Cardinal Students
 - Be very specific about the population the query should pull, e.g., students currently enrolled in classes whose primary program is Arts and Sciences undergraduate and whose cumulative GPA is 3.0 or higher

Requesting a New Query

- List all data fields you want displayed by the query
- List the order you want the data fields displayed
- State how you want the data sorted
- When possible, tech services will build your query with prompts so it can be useful to other departments



Demonstration