

Running a PeopleSoft Query

Purpose: Use this document as a reference for running a query in ctcLink.

Audience: All staff.

! You must have at least one of these local college managed security roles:

- ZD_DS_QUERY_VIEWER

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

Running a PeopleSoft Query

Navigation: Reporting Tools > Query > Query Viewer

1. The **Query Viewer** basic search page displays.
2. If you know the name of the query you'd like to run:
 - a. Enter **Query Name**.
 - b. Select **Search**.
 - c. Skip to Step 9.
3. If you don't know the name of the query you'd like to run: Select **Advanced Search**.The **Query Viewer** advanced search page displays.
4. Enter search criteria. Notice that the drop-down list next to each search criterion can be adjusted, depending on what you know about the query you seek. Options include "contains", "begins with", "between", and a host of others.
5. Select **Search**.
6. A list of candidates (possible queries) will display at the bottom of the page.

! If you are searching for a specific query that you know exists but doesn't appear in the returned search results--you *do not* have the correct security to access the query (illustrated in image below).

- For example, the below query is a FIN query that the staff member did not have the correct security role to access--the **No matching values were found** message displays

8. Identify the desired query and select the **HTML** link in the column titled **Run to HTML**.



If nothing happens when you select HTML, check pop-up blocker settings.



To eliminate time spent searching for a frequently used query, select the **Favorite** link to [Add to Favorites](#). Queries will be saved in the My Favorite Queries section on the Query Viewer page. To remove a query in the My Favorite Queries section, select the [-] icon.

9. The query opens in a new window.
10. Some queries will prompt you to enter specific parameters. These parameters allow the query to return filtered results. In the example below, we'll enter:
 - a. **Academic Institution**
 - b. **Academic Career**
 - c. **Admit Term**
 - d. **Admit Type**
11. Select **View Results**.
12. Results display at the bottom of the page.
13. You have the option to download the results to **Excel Spreadsheet, CSV Text File, or XML File**, simply by selecting one of these three links. You don't have to download the results if you don't want to.




If you do not select **Run to HTML** and instead select **Run to Excel**, you will be directed to the query and prompted to enter specific information. Once the **View Results** button has been selected, the query results will download directly into an Excel file where you will have the option to Save (illustrated in image below). The query results will only be displayed in Excel, and *not* on the screen.

14. When you're done, close the new window.

Process complete.

Add to Favorites

 If you frequently use a query, please click the **Favorites** link to add it to your favorites. Queries will be saved in the **My Favorite Queries** section of the Query Viewer page. To remove a query from the My Favorite Queries section, select the minus **[-]** icon.

- 1. Query **Search Results** display.
- 2. Select the **Favorite** link in the **Add to Favorites** column.
- 3. The query is added to the **My Favorite Queries** panel.

▼ My Favorite Queries

Q

1-5 of 5

◀ ▶

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Remove
CTC_AD_3CEENGINE_RESID	3C Engine PopSel Query CEMLI	Public	ADMISSIONS	HTML	Excel	XML	Schedule	Lookup References	—
QCS_CM_TERM_CLASSES	Classes offered each term	Public	CURRICULUM MGMT	HTML	Excel	XML	Schedule	Lookup References	—
QCS_SR_DEGREE_BY_TERM	Degrees by completion term	Public	STUDENT RECORDS	HTML	Excel	XML	Schedule	Lookup References	—
QCS_SR_TERM_ACT_INACTIVESTACK	Term Activated Inactive Progs	Public	ROSTERS	HTML	Excel	XML	Schedule	Lookup References	—
QCS_SR_WITHDRAWN	Withdrawing from all classes	Public	STUDENT RECORDS	HTML	Excel	XML	Schedule	Lookup References	—

Clear Favorites List

- 4. Select the **minus [-] icon** to delete a favorite query.
- 5. The query is no longer displayed in My Favorite Queries.

Video Tutorial

The video below demonstrates the process actions described in steps listed above. There is no audio included with this video. Select the play button to start the video.

Video Tutorial via Panopto

View the link to **Running a PeopleSoft Query**. This link will open in a new tab/window.