ctcLink PeopleSoft Reporting

Accessing ctcLink Queries and Reports

Data Services

March 2017
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Updated March 2020

Washington State Board for Community and Technical Colleges
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Course Introduction

Welcome to PeopleSoft Query! PeopleSoft Query is a data extraction tool that all ctcLink PeopleSoft users are able to access and use. A Query is simply a set of instructions on what data to pull from the system. For example, all students who were enrolled in Math for term 2167. Sometimes, these instructions can be modified by the end user in the form of a Prompt. Perhaps, instead of always pulling data for term 2167, the Query is written so that the end user would be prompted for which term they would like to see the data. There are many Queries which have already been written and are available for use. These Queries will extract data from the system that end users can use to create reports. In this class we are going to learn how to request the development of a new Query as well as how to find and run existing Queries. We are also going to learn how to use MetaLink to search Query metadata and how to find and run BI Publisher reports.

Course Goal

The goal of this course is to teach end users of ctcLink PeopleSoft to find and retrieve Queries and Reports in the most effective manner.

Course Learning Objectives

At the end of this course users will:

- Understand Query Development Requests and Query Migration
- Access PeopleSoft Query Viewer and Schedule Query
- Search for existing Queries using Wildcards.
- Run Queries to multiple outputs.
- Effectively use MetaLink to search Query metadata.
- Have knowledge of how to run reports created with BI Publisher.
Creating a New Service Desk Query Development Request

Before requesting a new query be created it is important to always search existing queries first. It may happen however that there is not already an existing Query to meet your needs. In this case you will contact one of your college’s Query Developers to request the development of a query. As each institution has a different process for this it is not something that will be covered in this course. If you do not know who your institution’s developers are please contact pmcdaniel@sbctc.edu.

Query Migration

Queries are developed in the ctcLink PCD (Production College Development) environment. Once they have been reviewed and tested by the creator and SBCTC Data Services team, they are migrated over to production.

Query Migrations occur twice a week on Tuesdays and Thursdays.
To be migrated on Tuesday submit the migration request ticket to Data Services by Monday at 3pm.

To be migrated on Thursdays, submit the migration request ticket to Data Services by Wednesday at 3pm.

Query requests sent for migration by Monday at 3pm will be in PRD on Wednesday Morning, while those sent in by 3pm on Wednesday, will be in PRD by Friday morning.
Using PeopleSoft Query

Once you have logged into PeopleSoft there are two main areas in PS Query you will be able to access:

- Query Viewer
- Schedule Query

Query Viewer is accessible by everyone with a PeopleSoft License and can be used to view Query output in HTML, Excel or XML. Users are also able to schedule a Query to run through Query Viewer.

Schedule Query is used exclusively for scheduling a Query to run at a future time or to run Queries with large results.

Use the following menu paths to access PS Query:

- Query Viewer: Main Menu → Reporting Tools → Query → Query Viewer
- Schedule Query: Main Menu → Reporting Tools → Query → Schedule Query

Using PeopleSoft Query Viewer

Query Viewer: Main Menu → Reporting Tools → Query → Query Viewer.

Query Viewer is accessible by everyone with a PeopleSoft License and can be used to view Query output in HTML, Excel or XML. The first screen of Query Viewer will give users the option to search for a Query as well as display any previously selected Favorite Queries.

Searching Using Query Viewer

From this screen users are able to search using the Operator “Begins With” by multiple criteria including:

- Access Group Name
- Description
- Folder Name
- Owner
- Query Name
- Type
- Uses Field Name
- Uses Record Name
In addition there is an Advanced Search capability where even more search functionality is available including different Operators such as:

- <
- <=
- =
- >
- >=

- Begins With
- Between
- Contains
- In
- Not =

**Query Viewer**

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

- 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
- *Query Type = User
- Owner =

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

[Search] [Clear] [Basic Search]
Searching Using Wildcards

PeopleSoft allows users to use wildcards in place of a single space by using _ or in place of everything following the wildcard by using %.

_ matches any single character. For example, _ones matches any five-character string ending with “ones”, such as "Jones" or "Cones".

% matches any string of zero or more characters. For example, C% matches any string starting with C, including C alone.

To use one of the wildcard characters as a literal character (for example, to include a % in your string), precede the character with a \ (for example, percent\%).

Query Viewer Options

Users are able to further refine search results by selecting folders from the Folder View field.

The Query results can be ran to:

- HTML
- Excel
- XML
- Schedule

Note that this is also where regularly accessed Queries can be added to Favorites by simply clicking on the "Favorite" hyperlink.

Click on the output selection to the right of the desired Query. In the Example below “Excel” was selected for the output results for the Query CTC_AD_3CENGINE_DEIN. A new tab will open if there are prompts to be filled in. (Make sure to allow pop-ups).
Click on “View Results” once the prompts have been filled in and the file will appear in the lower left hand side of the screen in Chrome. In IE a pop up will appear at the bottom of the screen asking to open or save the file.

Click the box in Chrome or "Open "in IE and a new instance of Excel will open in a new file with the Query results. The process is the same for XML files.

To view the results in a new tab, click on the “HTML” hyperlink from the results list.

TIP! When viewing the results in HTML you are able to, in essence, “re-run” the Query without the need to retype in all the prompt information. Instead, you are able to make whatever changes you want directly from the new tab.

For example, to quickly change the selected Term – instead of having to re-input Institution, Academic Career and Term, just change the Term.

The results will display in the new tab below the prompts.
Using PeopleSoft Schedule Query

Schedule Query is used exclusively for scheduling a Query to run at a future time or to run Queries with large results. However, Queries can also be scheduled through Query Viewer or Query Manager. The process to schedule a Query to run through Query Viewer and Query Manager is the same.

Scheduling a Query to Run Through Query Viewer

Search for the desired Query and click on "Schedule" from the list of results.

The “Scheduled Query” page will come up with the Query name previously selected already filled in along with designating whether the Query is Private or Public. If there is an existing Run Control ID for the Query it will display here.

If there is not an existing Run Control ID, enter one in the Field. A Run Control ID is used to tell the system when and where and how you want the report to run. For example, you might tell the system to run the report on the database server at 2 am or every Sunday afternoon, or you might tell it to run the report immediately. For most reports, you must also set parameters that determine the content of the report, such as the business unit or time period on which to report. These parameters are based on the Prompts used in the query and are saved by the Run Control ID so they don’t have to be re-entered each time you use the Run Control ID to run the query.

A run control is a database record that provides values for these settings. Instead of entering the same values each time you run a Query, you create and save a run control with those settings.

There is no specific naming convention for the Run Control ID but it is recommended to use the date and description (making sure to use underscore in place of spaces).

Run Control ID’s have a 30 character limit and cannot be easily deleted. They are individual to each user and are not visible by others.

Run Control ID’s can be used for a single Query to save the parameters or the user can change the Query associated with the ID.

Once the Run Control ID has been entered click on the “Add” button.

The Schedule Query page will display. The Query name will automatically populate based on the Query selected from Query Viewer or Query Manager. Enter a description for the Query Run Control ID in the Description Field. This will be the Report Name.
Note: if there are prompts (parameters) for the Run Control ID they can be updated here by clicking Update Parameters. You can save these changes to the Run Control ID by clicking “Save”. This will not, however, schedule the Query. To schedule the Query click on “Apply”.

The Process Scheduler Request page will display. Select the Time Zone, Date and Time to run the Query.

The Output Type and Format can also be selected here.

Click “OK”.

You will return to the Schedule Query page. Notice there is now a Process Instance number now associated with this Scheduled Query.
CTCLINK PEOPLESOFT REPORTING

PROCESS MONITOR

To view the status of your Scheduled Query click the “Process Monitor” hyperlink.
The Process Monitor will display the status of the Scheduled Query.
You are able to see the status of Scheduled Query runs by:

- User ID
- Type
- Number of days past
- Server
- Name
- Instance from and to
- Run Status
- Distribution Status

Click on “Save” to return to the previous page.

Another way to access the Process Monitor is through the menu path:
Main Menu> PeopleTools> Process Scheduler> Process Monitor

Once the Query has run and you see a status of “Success” click on “Go back to Scheduled Query”. This will return you to the first Scheduled Query search page. Note that your Run Control ID is filled in so to get to the Scheduled Query page to view the report via Report Manager click on ”Enter”. Click on the Report Manager hyperlink to view the Report.

REPORT MANAGER

Report Manager allows the user to filter displayed reports by:

- Folder
- Instance from and to
- Name
- Created on Date
- Number of Days past
- Date Range

Another way to access the Report Manager is through the menu path:
Main Menu> ReportingTools> Report Manager

Click on the Description found in the Report column to view the output.
The Query results can be viewed in the selected format by clicking on the Query Name in the Name column.

Scheduling through Query Viewer—Simplified Instructions for a New Run Control ID

- Go to Query Manager or Query Viewer and search for the desired Query and click on "Schedule "from the list of results
- The Query name will automatically populate based on the Query selected from Query Viewer or Query Manager.
- Click on Add New Value and enter a Run Control ID.
- Click on the “Add” button.
- If there are prompts (parameters) in the Query a pop up box will appear where they can be filled in. To update existing parameters click on Update Parameters.
- Enter a description for the Query Run Control ID in the Description Field. This will be the Report Name.
- Click Apply
- On the Process Scheduler page select the Time Zone, Date and Time to run the Query, if desired. Also change the default output Type and Format, if desired
- Click OK
- Note the Process Instance Number
- View the status of the run via Process Monitor
- View the results of the report via Report Manager

Scheduling through Query Viewer—Simplified Instructions for an Existing Run Control ID

- Go to Query Manager or Query Viewer and search for the desired Query and click on "Schedule "from the list of results
- The Query name will automatically populate based on the Query selected from Query Viewer or Query Manager.
- Click on Find an Existing Value and search for the Run Control ID.
- Click on the the hyperlink for the Report Name or Run Control ID in the search results.
- If there are prompts (parameters) in the Query a pop up box will appear where they can be filled in. To update existing parameters click on Update Parameters.
- Click Apply
- On the Process Scheduler page select the Time Zone, Date and Time to run the Query, if desired. Also change the default output Type and Format, if desired
- Click OK
- Note the Process Instance Number
- View the status of the run via Process Monitor
- View the results of the report via Report Manager
Scheduling a Query to Run Through Schedule Query

Navigate to the Schedule Query page by following this menu path: Main Menu → Reporting Tools → Query → Schedule Query

You will be brought to the page to search for an existing Scheduled Query via:

- Description
- Query Name
- Run Control ID

Click on the Add a New Value tab to create a new Scheduled Query Run.

Enter a Run Control ID in the Field. There is no specific naming convention for the Run Control ID but it is recommended to use the date and description (making sure to use underscore in place of spaces).

Once the Run Control ID has been entered click on the “Add” button.
The Schedule Query page will display. Search for the correct Query and add a Run Control ID description.

Note: Clicking on “Save” will save the Run Control ID for the Scheduled Query request however it will NOT schedule the Query run. To schedule the Query run, click on “Run”. Note that this is different than when accessing Schedule Query through Query Viewer or Query Manager.

The Process Scheduler Request page will display.

Select the Time Zone, Date and Time to run the Query.

The Output Type and Format can also be selected here.

Output Types available are:

Format Types available are:

Click “OK”.

You will return to the Schedule Query page. Notice there is now a Process Instance number now associated with this Scheduled Query.

To view the status of your Scheduled Query click the “Process Monitor” hyperlink.
**PROCESS MONITOR**

To view the status of your Scheduled Query click the “Process Monitor” hyperlink.

The Process Monitor will display the status of the Scheduled Query.

You are able to see the status of Scheduled Query runs by:

- User ID
- Type
- Number of days past
- Server
- Name
- Instance from and to
- Run Status
- Distribution Status

Click on “Save” to return to the previous page.

Another way to access the Process Monitor is through the menu path:
Main Menu> PeopleTools> Process Scheduler> Process Monitor

Once the Query has run and you see a status of “Success” click on “Go back to Scheduled Query”. This will return you to the first Scheduled Query search page. Note that your Run Control ID is filled in so to get to the Scheduled Query page to view the report via Report Manager click on “Enter”. Click on the Report Manager hyperlink to view the Report.

**REPORT MANAGER**

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- Folder
- Instance from and to
- Name
- Created on Date
- Number of Days past
- Date Range

Another way to access the Report Manager is through the menu path:
Main Menu> ReportingTools> Report Manager

Click on the Description found in the Report column to view the output.

The Query results can be viewed in the selected format by clicking on the Query Name in the Name column.
Scheduling through the Menu Path – Simplified Instructions for a New Run Control ID

- Navigate to Schedule Query: Main Menu → Reporting Tools → Query → Schedule Query.
- Click on Add a New Value to create a new Run Control ID. Enter a Run Control ID.
- Click on the “Add” button.
- Enter the Query name or search for the Query.
- Enter a description for the Query Run Control ID in the Description Field. This will be the Report Name.
- If there are prompts (parameters) in the Query a pop up box will appear where they can be filled in. To update existing parameters click on Update Parameters.
- Click Run.
- On the Process Scheduler page select the Time Zone, Date and Time to run the Query, if desired.
- Also change the default output Type and Format, if desired.
- Click OK.
- Note the Process Instance Number.
- View the status of the run via Process Monitor.
- View the results of the report via Report Manager.

Scheduling through the Menu Path – Simplified Instructions for an Existing Run Control ID

- Navigate to Schedule Query: Main Menu → Reporting Tools → Query → Schedule Query.
- Click on Find an Existing Value and select the correct Run Control ID.
- If there are prompts (parameters) in the Query a pop up box will appear where they can be filled in. To update existing parameters click on Update Parameters.
- Click Run.
- On the Process Scheduler page select the Time Zone, Date and Time to run the Query, if desired. Also change the default output Type and Format, if desired.
- Click OK.
- Note the Process Instance Number.
- View the status of the run via Process Monitor.
- View the results of the report via Report Manager.
Using the metaLink Data Dictionary

With any PeopleSoft implementation one of the most difficult things for users responsible for Query and Report development is to determine what data lives where and/or to understand the meaning and usage of each record and field. The sheer number of available tables and fields can be overwhelming for anyone attempting to learn the data structure. In addition, end users reading reports may have questions about the exact nature of the data they are looking at. What each particular date field means, for example.

The obvious answer to this challenge is, of course, a Data Dictionary. A Data Dictionary is a repository of detailed information about the data itself such as relationships to other data, definitions, usage, format, etc. Oracle defines it as a collection of tables with metadata. What is metadata? It is data about data. An example would be the field EMPLID. What type of field is it? Is it a character field, a numeric field? How many characters can it contain? What are valid entries into the field? The Data Dictionary gives users a place to search all of that information and more regarding the data that they use daily. In addition, the Data Dictionary also provides a place for information regarding data relationships.

To meet the need for a Data Dictionary for our Query Developers and end users to have access to the information they need regarding PeopleSoft data structure and metadata, Greg Gamble, of the Application Development team at the State Board developed a web application called metaLink. It is a .Net site on Framework 4.0, using C# on code pages. SQL Server is the Database. Having the web app developed in house allows us amazing flexibility.

The MetaLink app will support the college system by providing key information about the data stored within the tables and columns in Golden Gate, which are replicated from the ctcLink production database. The key information is critical to the accurate use of PeopleSoft data for reporting and/or analysis.

The key features of MetaLink allows designated users to:

- Document structures and properties for a given record or field.
- View completed data dictionary reports.
- View the ctcLink reporting catalog.
- Search for available PeopleSoft data queries.

Logging into the metaLink Data Dictionary

The Data Dictionary section of metaLink does require a login as it details PeopleSoft data structure, which is proprietary. The Data Dictionary provides the ability to search records by pillar or to search our State Board Master Data, which is used for our data warehouse. The search sections of metaLink do not require a logon.

In order to gain access to MetaLink you must first request a password. Please submit all requests for MetaLink passwords to Carmen McKenzie or Paula McDaniel.

cmckenzie@sbctc.edu or pmcdaniel@sbctc.edu.

Navigate to http://dataservicesmetalink.sbctc.edu

Click on Login in the upper right hand corner of the screen and enter your login credentials.
You will now be able to view metadata, edit metadata or edit your account information. Click on Meta Data to go to the Reporting Library.

**Using the metaLink Data Dictionary**

To view record information, click on View Current Data Dictionary. Note: At this point in the training, we are focusing on finding record and field information. The other areas of metaLink will be explained later in this class.

Select a pillar then choose to either display only common tables or only prompt tables and then select the table and click View Report. Note that record names in MetaLink are slightly different than the record names in PeopleSoft query as all record names in MetaLink begin with PS_.

There are two main sections: Table Information and column Information. Table Information holds details regarding the record while column Information holds details regarding the fields of the table.
Record Information

Record details are found under the header TABLE INFORMATION. The available fields are:

- **Table Name** – Name of the record.
- **Alternative Table Name** - The laymen name for the record. For example, the record STDNT_ENRL is commonly referred to as the Student Enrollment table.
- **Table Description** – Description of the record and what it is used for. Any pertinent information regarding the record.
- **Business Use Description** – Description of the business use of the record.
- **Pillar** – the Pillar the record belongs to.
- **Module** – the Module the record pertains to.
- **Prompt Table** - indicates if the record is used as a prompt table.
- **Effective Dated Table** - indicates if the record contains the EFFDT field.
- **Commonly Used Table** - indicates if the record has been flagged as commonly used.

<table>
<thead>
<tr>
<th>TABLE INFORMATION</th>
<th>PS_BEN_HEALTH_SRCH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table Name</td>
<td>PS_BEN_HEALTH_SRCH</td>
</tr>
<tr>
<td>Alternative Table Name</td>
<td>HEALTH_BENEFIT is a record that identifies all health-related benefit elections for an employee. These benefits are related to the plan types in the “H” series such as Medical, Dental, and Vision.</td>
</tr>
<tr>
<td>Table Description</td>
<td>HEALTH_BENEFIT is a record that identifies all health-related benefit elections for an employee. These benefits are related to the plan types in the “H” series such as Medical, Dental, and Vision.</td>
</tr>
<tr>
<td>Business Use Description</td>
<td></td>
</tr>
<tr>
<td>Parent Child Business Rules</td>
<td>SYISADM_HCM</td>
</tr>
<tr>
<td>Pillar</td>
<td>SYISADM_HCM</td>
</tr>
<tr>
<td>Module</td>
<td>BA - Benefits Administration</td>
</tr>
<tr>
<td>Prompt Table</td>
<td>No</td>
</tr>
<tr>
<td>Effective Dated Table</td>
<td>No</td>
</tr>
<tr>
<td>Commonly Used Table</td>
<td>No</td>
</tr>
</tbody>
</table>

Many of the tables only contain information on the Table Name and Pillar which is why it is so important to add information if you have it. If we look at the table BEN_HEALTH_SRCH in the HCM pillar we can see some of the great information that has been added to metaLink about the record.

The information in the Table Description field of this record provides users with vital knowledge about which fields to use to create a join with another record. Without this information, a user could inadvertently join on the wrong field and thus create a query with incorrect or misleading results.

Field Information

Field details are found under the header COLUMN INFORMATION. The available fields are:

- **Alternative column Name** - The laymen name for the column. For example, the column name STRM is commonly referred to as Session/Term.
• Description - The description of the field and what it is used for. Any pertinent information regarding the field should be included.
• Primary Key - Indicates if this field is part of the primary key for the record (table). The combination of primary key fields represent the uniqueness of the row in the record.
• Data Type - A classification identifying one of various types of data, such as integer, text or decimal that determines the possible values for that type.
• Size - The length or scale of the field value. Size is directly related to the Data Type.
• Nullable - Indicates if the field can contain null or blank values.
• Data Classification - The WA State Office of the Chief Information Officer (OCIO) data classification. Category 1 thru 4 are used with Category 1 being public information and category 4 being confidential information requiring special handling.
• For a detailed description of each category, see the Data Classification Brief here: [http://www.sbctc.edu/resources/documents/colleges-staff/data-services/data-warehouse/DataClassificationBrief.pdf](http://www.sbctc.edu/resources/documents/colleges-staff/data-services/data-warehouse/DataClassificationBrief.pdf)
• History: Includes any historical changes to the field such as inclusions or exclusions of values.
• Accountable Commission: Designated by the Data Governance Committee and indicates which system commission is ultimately accountable for this specific data element.
• Examples of Use: Provides examples of how/when to use the field. Information about auto-joins and how they might affect the query, etc.
• Converted: The table and field name of the legacy source record if converted during implementation.
• Common column: Used only by SBCTC.
• Notes – Any other notes, pertinent information regarding the field.
• Valid Values – field values and their meanings.

You will see how the information presented could be useful. For example, when studying the tables, we see that the STDNT_GRP table does not have an Effective Status yet the STDNT_GRP_HIST does have Effective Status. This means that whenever you need a query to display students in an inactive status you must use the STDNT_GRP_HIST table. Also, note the STDNT_GROUP_TBL defines student group codes making it an excellent choice for a prompt table.
MetaLink Query, Report and Pivot Grid Search

One of the great things about MetaLink is that it allows users to search for queries, reports and pivot grids across a variety of fields from a single input source. Users are able to search across all pillars, by a single Folder or by all Folders, across Description, Definition and field name. The plethora of available options and the ease of searching is one of the best features of MetaLink. In PeopleSoft query for example, the only way to search by query definition is by creating a query to do so while MetaLink allows query definition searching with no additional effort required.

To search MetaLink for existing queries, reports and pivot grids in Production click on the Meta Data tab if you are logged into the system.

If you are not logged in as a logon is not required for this section simply click on Search Tools.

Next click on View Query, Report and Pivot Grid search hyperlink.

From here, you will enter your search criteria.

It is important to note that users enter the search criteria in one page to search three different objects; queries, reports and pivot grids. However, each search criteria may not actually apply to all three objects. For example, Modules will search reports only while Folders will only search queries. However, Pillars will search queries, reports and pivot grids. If the search criteria does not apply to a certain tab then
an exhaustive list of complete inventory will display instead of a filtered list of search results. How will a user know which search criteria applies to which tabs? There is a Definitions box to the right of the search criteria, which explains which search criteria affects which tab.

**Definitions**

- **Pillar** – Will search Queries, Reports and Pivot Grids.
- **Module** – Will search Reports.
  - Pivot Grid and Queries will display ALL current inventory.
- **Folders** – Will search Queries.
  - Pivot Grid and Reports will display ALL current inventory.
- **Field Names** – Will search Queries and Pivot Grids.
  - Reports will display ALL current inventory.
  - Use a comma (,) as an OR separator to search multiple fields.
  - AND separator searches are not available.
- **Free Text** – Will search Queries, Reports and Pivot Grids.
  - Free Text Search allows using up to four search terms.
    - Use a comma as an OR separator to search using multiple search terms.
    - Use a single space as an AND separator to search using multiple search terms.

*All search boxes are separated by AND conditional operator logic.*

**Search Criteria Boxes**

**All Pillars**

If you want to search a specific pillar, you are able to select it in the “All Pillars” box. If you want to search across all three pillars, simply leave “All Pillars” selected. Queries, reports and pivot grid results will be returned based on your selection.
Modules

Selecting a module will narrow the search and only return Reports based on the selected module. The search will produce results in the Queries and Pivot Grids tabs; however, the results will simply be a list of all current queries and pivot grids, not a list of results based on Module. Instead, the only tab, which will reflect a filtered list of results, will be the Reports tab.

Folders

In the next box, you are able to search for queries either in a specific folder or across all folders if ‘All Folders’ is selected. The search will produce results in the Reports and Pivot Grids tabs, however the results will simply be a list of all current reports and pivot grids, not a list of results based on Folder. Instead, the only tab, which will reflect a filtered list of results, will be the Queries tab.
Field Names

In the Fields box, users are able to enter field names to find results. Commas act as an “OR” separator allowing multiple fields to be searched, however it is not possible to search multiple fields based on an "AND" logic at this time. The search will produce results in the Queries and Pivot Grids tabs, results in the Reports tab will simply be a list of all current reports, not a list of results based on the Field/s entered.
Free Text Search

The “Free Text Search” box will search across all columns in all three tabs returning any results, which contains the word or words entered. Up to five terms can be separated by a comma for an "OR" logic separation or a space which acts as an "AND" separation logic.

Combine Search criteria

In the same way as the Advanced Search in PeopleSoft, all of the fields used for searching in MetaLink can be combined with other fields to narrow down your search results to find specifically the queries, reports or pivot grids you are most interested in. Just make sure to keep in mind that some of the search fields are designed to only search either queries, reports, or pivot grids.

Search Results

Each tab will display either results or a message saying no results found if the search applies to that tab. If the search does not apply to the tab then a complete list of current inventory will display. For example, if a search is performed on the Modules box then a complete, exhaustive list of all queries will display, as the Modules search does not apply to queries as shown below.
It gets really interesting however, if another search criteria has been selected. Following the same example, let's say that we selected the Pillar of FIN and then selected a Module. Then, the list of queries (and pivot grids) will be exhaustive and complete WITHIN the Finance module.

It can be a bit confusing at first, but with practice, it will soon make sense!
Queries Tab Results

The Queries Tab will show queries that match the search criteria (or all queries as explained above). The list will include the:

- Pillar
- Folder
- Query Name
- Description
- Long Description (Definition)

The query name will be in the form of a hyperlink, which can be clicked to bring up additional details about the query.

![Query Search Results](image)

The additional details available via the hyperlink are the table/field pairs that show which records and fields were used in the creation of the query.
Reports Tab Results

The Reports Tab will show reports that match the search criteria (or all reports as previously explained). The list will include the:

- Pillar
- Module
- Report ID
- Report Name
- Description

The report name will be in the form of a hyperlink, which can be clicked to bring up additional details about the report.
The additional details available via the hyperlink are:

- Report ID
- Business Process Number
- CEMLI Number
- Report Name
- Report Description
- Report Type
- PeopleSoft Navigation
Pivot Grids Tab Results

The Pivot Grids Tab will show pivot grids that match the search criteria (or all pivot grids as previously explained). The list will include the:

- Pillar
- Object Name (Pivot Grid Name)
- Description
- Long Description
The pivot grid name will be in the form of a hyperlink, which can be clicked to bring up additional details about the pivot grid.

![Pivot Grid Search Results](image)

The additional details available via the hyperlink are table/field pairs that show which records and fields were used in the creation of the pivot grid.

![Pivot Grid Details](image)

**View Script Search**
The MetaLink Script Search allows for searching for the underlying SQL script used in the creation of Views. Users can search by View Name and/or by Pillar. Click on Meta Data to go to the Reporting Library.

Click on View Script Search.

Here you will enter your search terms.

The results will display as show below.
Click on the hyperlink of the View Name to see the underlying SQL code.

Resources

While it is now possible to search commonly used tables in metaLink there is also a Resources page where full documents of commonly used tables are available by pillar.

To access these documents simply click on Resources when accessing the home page.
This brings the user to the Resources page where documents are available for download.

### Resources

#### File Downloads

**Campus Solutions Commonly Used Tables**
- Campus Solutions Pillar

**Finance Commonly Used Tables**
- Finance Pillar

**Human Capital Management Commonly Used Tables**
- Human Capital Management Pillar
Adding Information to MetaLink

How is it populated? Well, while we in Data Services are definitely the responsible party for making sure it is populated, we are also harnessing the knowledge and expertise of our users... all of our users, not just Query Developers. The app is basically a wiki utilizing crowdsourcing as its source of information. We leverage our communities of practice, functional analysts, project staff... anyone who knows (or finds out something interesting) about the data is able to share their knowledge. As we gain information about data structure and business uses of different fields and records we have an obligation to all our fellow users to share it. It is quick and easy to add in information.

Click on Edit Meta Data

To update the record – select only the Pillar and record. To update a field within a record – select the Pillar, record and field you would like to modify. Type in the new information.

Scroll to the bottom of the screen when finished and click Save Data.
BI Publisher Introduction

Oracle Business Intelligence Publisher (BI Publisher, formerly XML Publisher) is an enterprise reporting solution that streamlines report and form generation. BI Publisher enables you to design and create report layout templates with the more common desktop applications of Microsoft Word and Adobe Acrobat, and renders XML data based on those templates. With a single template, it can generate reports in many formats (PDF, RTF, Excel, HTML, and so on) in many languages. This approach to reporting can dramatically reduce report maintenance, enabling power business users to adjust report templates without involvement of IT resources.

In essence BI Publisher allows the State Board to create actual formatted reports using Queries, Connected Queries or other data sources and then allow the end users the option of how the report should be rendered. Users are able to select to view a report on the Web, in Excel, Word or Adobe. BI Publisher is basically a translator of data. It takes the raw format of Query results and translates those results into a nicely formatted report.

The BI Publisher report naming convention prefixes will be:

- BCS - Campus Solutions
- BFS - Finance
- BHC - Human Capital Management

The rest of the BIP report name will follow the standard query naming convention.

For the purpose of this class we are going to be looking at how to view Query based BI Publisher reports through Query Report, how to run a BI Publisher report using Query Report Scheduler and using BI Publisher Report search.

BI Publisher Query Report Viewer

The BI Publisher Query Report Viewer allows end users to run Query based BI Publisher reports. Note: BI Publisher reports with data sources other than Query do not appear in search results and will need to be scheduled to run.

Navigate to Query Report Viewer: Main Menu → Reporting Tools → BI Publisher → Query Report Viewer

There are two search methods: Basic Search and Advanced Search.

Basic Search

Basic Search allows users to search by:

- Data Source ID
- Data Source Owner
- Object Owner ID
- Report Category ID
- Report Description
- Report Name
- Template Type
Wildcards % and _ can be used in your searches. “Begins With” is the only available operator in Basic Search.

**Advanced Search**

The Advanced Search allows for the same searching options but with different operators available. Users can combine search Criteria in the Advanced Search to narrow the results returned.

Wildcards % and _ are also available to use in your searches here. Enter your search Criteria or simply hit enter for a list of all available reports.

Users are able to select how the report should be displayed in the Format column. Available options are:

- PDF
- HTM
- RTF
- XLS

Once the Format selection is made, click on “View Report” to see the report results.
BI Publisher Query Report Scheduler

The Query Report Scheduler is similar to Schedule Query in that users are able to schedule reports to run at a specific time/date or immediately. All BI Publisher reports with data sources of Query or Connected Query are available to be run through this tool.

Note: Do not schedule any Queries or Reports to run between the hours of 1 am and 3 am as this time is reserved for IT.

The BI Publisher Query Report Scheduler is very similar in use and appearance to Schedule Query. Each report is assigned a Run Control ID which will tell the system when, where and how to run the report saving the report parameters (prompts) to the Run Control ID. Run Control ID’s are personal and are not shared across the system.

Adding a New Run Control ID Detailed Instructions

Navigate to Query Report Viewer: Main Menu → Reporting Tools → BI Publisher → Query Report Scheduler

If adding a new Run Control ID, select the Add a New Value tab. Enter the Run Control ID and click on “Add”. This will take you to the Query Report Scheduler Page.

On this page select the Report Name. Either type it in or click on the magnifying glass next to the Report Name Field to search for your report. Once you have made the selection if there are prompts in the report you will be asked to enter in the values.
Note that once the Report Name is entered the remainder of the fields will fill in automatically with the exception of Template as of Date where users can select a particular version of the template they want the report to be based on. Click on Run in the upper right corner to run the report.

This will take you to the Process Scheduler Request page where final selections are made including the Date and Time to run the report as well as Type and Format. Once done with the selections click OK to schedule the report.

You will be directed back to the Query Report Scheduler page where you will be able to check the Process Monitor and the Report Manager for your report.
Adding a new Run Control ID Simplified Instructions

- Navigate to Query Report Viewer: Main Menu → Reporting Tools → BI Publisher → Query Report Scheduler
- Click the Add a New Value tab. Enter the Run Control ID and click on “Add”.
- This will take you to the Query Report Scheduler Page.
- On this page select the Report Name. Either type it in or click on the magnifying glass next to the Report Name Field to search for your report. Once you have made the selection if there are prompts in the report you will be asked to enter in the values.
- Note that once the Report Name is entered the remainder of the fields will fill in automatically with the exception of Template as of Date where users can select a particular version of the template they want the report to be based on. Click on Run in the upper right corner to run the report.
- This will take you to the Process Scheduler Request page where final selections are made including the Date and Time to run the report as well as Type and Format. Once done with the selections click OK to schedule the report.
- You will be directed back to the Query Report Scheduler page where you will be able to check the Process Monitor and the Report Manager for your report.

Using an Existing Run Control ID Detailed Instructions

Navigate to Query Report Viewer: Main Menu → Reporting Tools → BI Publisher → Query Report Scheduler
From the main Query Report Scheduler page you are also able to search for an existing Run Control ID.

There are two search methods: Basic Search and Advanced Search.

**Basic Search**

Basic Search allows users to search by:
- Data Source ID
- Data Source Type
- Description
- Language Code
- Report Name
- Run Control ID

Wildcards % and _ are also available to use in your searches here.

“Begins With” is the only available operator in Basic Search.
The Advanced Search allows for the same searching options but with different operators available. Users can combine search Criteria in the Advanced Search to narrow the results returned.

Wildcards % and _ are also available to use in your searches here.

Enter your search Criteria or simply hit enter for a list of all Run Control ID’s. Remember they are personal to you so only Run Control ID’s you have created will display here.

Click on the hyperlink of the Report you wish you run. This will take you to the Query Report Scheduler page where the report name will be filled in already. The parameters will also be saved though they can be changed by clicking on the Update Parameters hyperlink. Click on Run in the upper right corner to run the report.

This will take you to the Process Scheduler Request page where final selections are made including the Date and Time to run the report as well as Type and Format. Once done with the selections click OK to schedule the report.
You will be directed back to the Query Report Scheduler page where you will be able to check the BI Publisher Process Monitor and the Report Manager for your report.

Using an Existing Run Control ID Simplified Instructions

- Navigate to Query Report Viewer: Main Menu → Reporting Tools → BI Publisher → Query Report Scheduler
- Search for an existing Run Control ID. To search for all Run Control ID’s simply press enter or click Search
- This will show you a list of all available Run Control ID’s.
- Click on the hyperlinked name of the desired Run Control ID.
- This will take you to the Query Report Scheduler page where the report name will be filled in already. The parameters will also be saved though they can be changed by clicking on the Update Parameters hyperlink.
- Click on Run in the upper right corner to run the report.
- This will take you to the Process Scheduler Request page where final selections are made including the Date and Time to run the report as well as Type and Format. Once done with the selections click OK to schedule the report.
- You will be directed back to the Query Report Scheduler page where you will be able to check the Process Monitor and the Report Manager for your report.

BI Publisher Report Search

The BI Publisher Report Search will allow users to search specifically for the results of their scheduled BI Publisher reports. It is similar to Report Manager. In the example to the right the search was made for all BI Publisher Reports ran within the last 30 days.
Also note that users are able to access the BI Publisher Process Monitor and BI Publisher Report Manager from this page.

Click on the hyperlink in the Report column to go to the Report Index page to view the report.

To download and/or view the report click on the Report Name in the File List box.

It is interesting to note that while there appears to be separate Process Monitors and Report Viewers for BI Publisher with different menu paths they are actually the same Query Process Monitor and Report Viewer as found when scheduling standard Queries. You will be able to view both BI Publisher reports and standard scheduled Queries from either navigation. At the same time, only BI Publisher run Control ID’s will display when finding an existing value in BI Publisher Query Report Scheduler and only Run Control ID’s for standard Queries will display in Schedule Query.
Course Exercises Campus Solutions

1. Navigate to PeopleSoft Query Viewer and search for the Query QCS_AA_ENROLLED_NO_ADVISOR. Select to run the output to HTML using the following prompts:
   - Institution – WA171
   - Term – 2161
   - Career – UGRD
   List the number of results returned

2. Practice changing the prompts in the HTML output. Change the following:
   - Institution - WA220
   - Term – 2147
   - Career – CNED
   List the number of results returned

3. Returning to Query Viewer, select Advanced Search and using the % Wildcard search for all Queries in folders that begin with: Academic%
   How many Queries were returned:

4. Still in Advanced Search look for all Queries which use the Field Name DISB_PLAN. You may practice using Wildcards in this search as well.
   How many Queries were returned:

5. Go back to Basic Search and look for and select any Query that begins with QC_ then add the selected Query to your “Favorites”.
   List the name of the Query here:

6. Navigate to Query Viewer and search for QCS_PAULA_STDNT_ENROLL_INSTIT. Run the Query to Excel. Use the following for the prompts:
   - Institution – WA172
   - Status – Waiting
   - Term - 2163
   Open the file in Excel. How many results were returned?

7. Navigate to Schedule Query and schedule your Query to run immediately.
   Write down your Process Instance number here:
   View your Query results in Report Manager.

8. Navigate to Data Services MetaLink and click on the Meta Data tab. In the Current Data Dictionary find the field GRADING_BASIS in the PS_ACAD_CAR_TBL record. What does the Value OPT stand for in this field?
9. Going to Query Search look in the CS Pillar in the Student Financials Folder for Queries that have the code 890 in the definition and use the fields: ADVR_LOAD_ENRL and STDNT_CAR_NBR. How many Queries match these Criteria?

10. Now go to Report Search and look in the CS Pillar in the Financial Aid folder for Queries which have a name or description with “Student”. How many reports match these Criteria?

11. When searching in MetaLink a space acts as an ________ separator and a comma acts as an ________________ separator.

12. MetaLink allows users to search across all pillars by Folder, Description, Definition and Query Name?  
   True  False

13. The BI Publisher report naming convention prefix for Campus Solutions will be:

14. BI Publisher Query Report Viewer allows end users to run ____________ based BI Publisher reports.

15. The Process Monitor and Report Manager for PeopleSoft Query and BI Publisher are the same and will display both types of requests.
   True  False

16. When searching for Run Control ID’s in BI Publisher both Run Control ID’s created in Schedule Query and BI Publisher Query Report Scheduler will display.
   True  False
**Course Exercises Human Capital**

1. **Navigate to PeopleSoft Query Viewer and search for the Query QHC_HR_EMPLOYEES_BY_BUS_UNIT.** Select to run the output to HTML using the following prompts:
   - Business Unit – HR170

   List the number of results returned ________________________________

2. **Practice changing the prompts in the HTML output.** Change the following:
   - Business Unit – HR220

   List the number of results returned ________________________________

3. **Returning to Query Viewer, select Advanced Search and using the % Wildcard search for all Queries in folders that begin with: Pay%**
   - How many Queries were returned: ________________________________

4. **Still in Advanced Search look for all Queries which use the Field Name VENDOR_CLASS.** You may practice using Wildcards in this search as well.
   - How many Queries were returned: ________________________________

5. **Go back to Basic Search and look for and select any Query that begins with QH_ then add the selected Query to your “Favorites”.**
   - List the name of the Query here: ________________________________

6. **Navigate to Query Viewer and search for QHC_PAULA_EMPL_BY_CO.** Run the Query to Excel. Use the following for the prompts:
   - Business Unit – HR220

   Open the file in Excel. How many results were returned? ________________________________

7. **Navigate to Schedule Query and schedule your Query to run immediately.**
   - Write down your Process Instance number here: ________________________________
   - View your Query results in Report Manager.

8. **Navigate to Data Services MetaLink and click on the Meta Data tab.** In the Current Data Dictionary find the field EMPLID_TYPE in the PS_PAY_CHECK record. What does the Value E stand for in this field?

   __________________________________________________________________________

9. **Going to Query Search look in the HCM Pillar in All Folders for Queries that have the code 890 in the definition and use the fields: ACCOUNT and FUND_CD.** How many Queries match these Criteria?

   __________________________________________________________________________

10. **Now go to Report Search and look in the HCM Pillar in the HR Core Objects folder for Queries which have a name or description with “Salary”.** How many reports match these Criteria?

   __________________________________________________________________________

11. **When searching in MetaLink a space acts as an ____________ separator and a comma acts as an ________________ separator.**
12. MetaLink allows users to search across all pillars by Folder, Description, Definition and Query Name?
   True  False

13. The BI Publisher report naming convention prefix for Campus Solutions will be:

14. BI Publisher Query Report Viewer allows end users to run _______________ based BI Publisher reports.

15. The Process Monitor and Report Manager for PeopleSoft Query and BI Publisher are the same and will display both types of requests.
   True  False

16. When searching for Run Control ID’s in BI Publisher both Run Control ID’s created in Schedule Query and BI Publisher Query Report Scheduler will display.
   True  False
Course Exercises Financials

1. Navigate to PeopleSoft Query Viewer and search for the Query QFS_PO_VENDOR_ITEM_DETAIL. Select to run the output to HTML using the following prompts:
   - Unit – WA220
   List the number of results returned

2. Practice changing the prompts in the HTML output. Change the following:
   - Institution – WA170
   List the number of results returned

3. Returning to Query Viewer, select Advanced Search and using the % Wildcard search for all Queries in folders that begin with: Expen%
   How many Queries were returned:

4. Still in Advanced Search look for all Queries which use the Field Name EXPENSE_TYPE. You may practice using Wildcards in this search as well.
   How many Queries were returned:

5. Go back to Basic Search and look for and select any Query that begins with QF_ then add the selected Query to your “Favorites”.
   List the name of the Query here:

6. Navigate to Query Viewer and search for QFS_PAULA_VENDOR_LOC. Run the Query to Excel. Use the following for the prompts:
   - SetID: WACTC
   - Location: 220
   Open the file in Excel. How many results were returned?

7. Navigate to Schedule Query and schedule your Query to run immediately.
8. Write down your Process Instance number here:

9. Navigate to Data Services MetaLink and click on the Meta Data tab. In the Current Data Dictionary find the field VAT_ACCOUNT_FLG in the PS_GL_ACCOUNT_TBL record. What does the Value N stand for in this field?

10. Going to Query Search look in the FIN Pillar in the Expenses folder for Queries that have the code 890 in the definition and use the fields: ACCOUNT and FUND_CD. How many Queries match these Criteria?

11. Now go to Report Search and look in the FIN Pillar in the Payables folder for Queries which have a name or description with “1099”. How many reports match these Criteria?
12. When searching in MetaLink a space acts as an _________ separator and a comma acts as an _________________ separator.

13. MetaLink allows users to search across all pillars by Folder, Description, Definition and Query Name?  
   True    False

14. The BI Publisher report naming convention prefix for Campus Solutions will be:

________________________

15. BI Publisher Query Report Viewer allows end users to run _______________ based BI Publisher reports.

16. The Process Monitor and Report Manager for PeopleSoft Query and BI Publisher are the same and will display both types of requests.  
   True    False

17. When searching for Run Control ID’s in BI Publisher both Run Control ID’s created in Schedule Query and BI Publisher Query Report Scheduler will display.
   True    False
Course Review

The goal of this course was to teach end users of ctcLink PeopleSoft to find and retrieve Queries and Reports in the most effective manner.

The Objectives for this course were to give attendees the tools and necessary information to:

• Properly create a Query Development Request and Understand Query Migration
• Access PeopleSoft Query Viewer and Schedule Query
• Search for existing Queries using Wildcards.
• Run Queries to multiple outputs.
• Effectively use MetaLink to search Query metadata.
• Have knowledge of how to run reports created with BI Publisher.

To meet the Goal and Objectives we learned how to correctly create a development request and the steps for Query migration. We saw how to search for and run Queries in Query Viewer and how to schedule Queries to run. We learned how to run Queries to multiple outputs and use Wildcards in searches. We also became knowledgeable about MetaLink and how it can be a very useful tool for finding information and how to run and schedule reports created through BI Publisher.
**ctcLink PeopleSoft Reporting Training Evaluation**

Please take a moment to answer the following questions. Your comments are an **important contribution** as we design learning experiences to meet your professional needs.

What will you do **differently** as a result of this training?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

What do you feel were the **strengths** of this course?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

What do you feel were the **weaknesses** of this course?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

How can we **improve** this course?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

What additional **training-development** in PS Query do you require?

________________________________________________________________________

Please rate the following statements using a 1 through 5 scale where:
<table>
<thead>
<tr>
<th>Question</th>
<th>1 (Agree Strongly)</th>
<th>2 (Agree)</th>
<th>3 (Neutral)</th>
<th>4 (Disagree)</th>
<th>5 (Strongly Disagree)</th>
</tr>
</thead>
<tbody>
<tr>
<td>The course <strong>difficulty level</strong> was about right.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I can <strong>apply the information</strong> I learned in this course to my job.</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>The course met my professional <strong>educational needs</strong>.</td>
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</tr>
<tr>
<td>The trainer <strong>actively involved</strong> me in the learning process.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>As a result of this training, I feel <strong>more confident</strong> in my capacity to develop Queries.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix - Simplified Instructions

Scheduling through Query Viewer– Simplified Instructions for a New Run Control ID

- Go to Query Manager or Query Viewer and search for the desired Query and click on "Schedule " from the list of results.
- The Query name will automatically populate based on the Query selected from Query Viewer or Query Manager.
- Click on Add New Value and enter a Run Control ID.
- Click on the “Add” button.
- If there are prompts (parameters) in the Query a pop up box will appear where they can be filled in. To update existing parameters click on Update Parameters.
- Enter a description for the Query Run Control ID in the Description Field. This will be the Report Name.
- Click Apply
- On the Process Scheduler page select the Time Zone, Date and Time to run the Query, if desired. Also change the default output Type and Format, if desired
- Click OK
- Note the Process Instance Number
- View the status of the run via Process Monitor
- View the results of the report via Report Manager

Scheduling through Query Viewer– Simplified Instructions for an Existing Run Control ID

- Go to Query Manager or Query Viewer and search for the desired Query and click on "Schedule " from the list of results.
- The Query name will automatically populate based on the Query selected from Query Viewer or Query Manager.
- Click on Find an Existing Value and search for the Run Control ID.
- Click on the the hyperlink for the Report Name or Run Control ID in the search results.
- If there are prompts (parameters) in the Query a pop up box will appear where they can be filled in. To update existing parameters click on Update Parameters.
- Click Apply
- On the Process Scheduler page select the Time Zone, Date and Time to run the Query, if desired. Also change the default output Type and Format, if desired
- Click OK
- Note the Process Instance Number
- View the status of the run via Process Monitor
- View the results of the report via Report Manager
Scheduling through Schedule Query Menu Path – Simplified Instructions for a New Run Control ID

- Navigate to Schedule Query: Main Menu → Reporting Tools → Query → Schedule Query.
- Click on Add a New Value to create a new Run Control ID. Enter a Run Control ID.
- Click on the “Add” button.
- Enter the Query name or search for the Query.
- Enter a description for the Query Run Control ID in the Description Field. This will be the Report Name.
- If there are prompts (parameters) in the Query a pop up box will appear where they can be filled in. To update existing parameters click on Update Parameters.
- Click Run.
- On the Process Scheduler page select the Time Zone, Date and Time to run the Query, if desired.
- Also change the default output Type and Format, if desired.
- Click OK.
- Note the Process Instance Number.
- View the status of the run via Process Monitor.
- View the results of the report via Report Manager.

Scheduling through Schedule Query Menu Path – Simplified Instructions for an Existing Run Control ID

- Navigate to Schedule Query: Main Menu → Reporting Tools → Query → Schedule Query.
- Click on Find an Existing Value and select the correct Run Control ID.
- If there are prompts (parameters) in the Query a pop up box will appear where they can be filled in. To update existing parameters click on Update Parameters.
- Click Run.
- On the Process Scheduler page select the Time Zone, Date and Time to run the Query, if desired. Also change the default output Type and Format, if desired.
- Click OK.
- Note the Process Instance Number.
- View the status of the run via Process Monitor.
- View the results of the report via Report Manager.
Searching Record and Field Information – MetaLink

- Click on Meta Data to go to the Reporting Library.
- Click on View Current Data Dictionary.
- Select a pillar and table then click View Report.
- Table Information holds details regarding the record while Column Information holds details regarding the fields of the table.

BI Publisher Reports

- Navigate to Query Report Viewer: Main Menu → Reporting Tools → BI Publisher → Query Report Viewer
- Search for a Report
- Select the desired format in which to view the Report
- Click on View Report
Adding a new Run Control ID Simplified Instructions

- Navigate to Query Report Viewer: Main Menu → Reporting Tools → BI Publisher → Query Report Scheduler
- Click the Add a New Value tab. Enter the Run Control ID and click on “Add”.
- This will take you to the Query Report Scheduler Page.
- On this page select the Report Name. Either type it in or click on the magnifying glass next to the Report Name Field to search for your report. Once you have made the selection if there are prompts in the report you will be asked to enter in the values.
- Note that once the Report Name is entered the remainder of the fields will fill in automatically with the exception of Template as of Date where users can select a particular version of the template they want the report to be based on. Click on Run in the upper right corner to run the report.
- This will take you to the Process Scheduler Request page where final selections are made including the Date and Time to run the report as well as Type and Format. Once done with the selections click OK to schedule the report.
- You will be directed back to the Query Report Scheduler page where you will be able to check the Process Monitor and the Report Manager for your report.

Using an Existing Run Control ID Simplified Instructions

- Navigate to Query Report Viewer: Main Menu → Reporting Tools → BI Publisher → Query Report Scheduler
- Search for an existing Run Control ID. To search for all Run Control ID’s simply press enter or click Search
- This will show you a list of all available Run Control ID’s.
- Click on the hyperlinked name of the desired Run Control ID.
- This will take you to the Query Report Scheduler page where the report name will be filled in already. The parameters will also be saved though they can be changed by clicking on the Update Parameters hyperlink.
- Click on Run in the upper right corner to run the report.
- This will take you to the Process Scheduler Request page where final selections are made including the Date and Time to run the report as well as Type and Format. Once done with the selections click OK to schedule the report.
- You will be directed back to the Query Report Scheduler page where you will be able to check the Process Monitor and the Report Manager for your report.