PeopleSoft Query Development Life Cycle

Data Services

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Paula McDaniel, Data Analytics Learning and Education Instructor
Washington State Board of Community and Technical Colleges, Data Services
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COURSE GOAL
The goal of this course is to train Query Developers on the relationship between training and Query Manager access levels as well as the conventions and protocols followed in the Query Development Life Cycle. This will allow for quick and efficient query migration of new and updated queries from the Production College Development (PCD) environment to the Production (PRD) environment.

COURSE LEARNING OBJECTIVES
At the end of this course users will be able to:

1. Define roles, responsibilities and requirements for each Query Developer level.
2. Explain why searching for an existing query before developing a new query is the essential first step in query development.
3. Describe query development conventions and protocol in query creation and modification. Including:
   a. Query Naming Convention
   b. Query Description
   c. Query Definition
   d. Prompts Utilization
   e. Public vs Private Queries
   f. Query Folders
   g. Query Performance
4. Demonstrate the ability to correctly fill out a Query Migration Request Form.
5. Identify all of the criteria which must be met to modify an existing query.
6. Identify who owns what Query or Report based on prefix.
7. Explain BI Publisher reports naming convention
8. Explain Connected Query naming convention
SECTION 1 - QUERY DEVELOPER STRUCTURE AND QUERY MANAGER ACCESS LEVELS

This section is designed to provide users with knowledge of Query Developer structure as well as the necessary information to grow as a Query Developer. Successful completion of training is closely related to the level of access a user has. As more and more training is successfully completed the user is able to gain more access to Query Manager as well as access to other reporting tools such as BI Publisher and Connected Query. At the end of this section users will be able to:

1. Explain Query Developer structure, roles and responsibilities of each role.
2. List what courses must be successfully completed in order to acquire access to Query Manager.
3. List what courses must be successfully completed in order to become an Advanced Query Developer and/or Report Developer.

Query Developer Structure

There is a definitive structure that each institution will follow for managing query development and Query Developers. Each institution will have:

- A Reporting Lead
- Query Developers

Each institution may have:

- Advanced Query Developers
- Report Developers

The Reporting Lead

Each institution will have a person designated as a Reporting Lead. This person will:

- Be the main point of contact for SBCTC.
- Authorize college query developers.
- Be a member of system query governance community.
- Address query development training needs.
- Make sure standards are correctly followed.

Though there may be some colleges who wish to designate an internal lead per pillar, there will need to be a single “main” reporting lead for SBCTC purposes.

Query Developer Levels and Query Manager Access

As Data services manages Query Developer training and access to Query Manager, it is our goal that all Query Developers are granted the correct access to fit their ability. As their ability and skills grow, their access to Query Manager can expand concurrently.

There are currently three levels of Query Developers:

- Query Developer
- Advanced Query Developer
- Report Developer
**Query Developer**

- Access to Query Manager in the PCD environment only.
- Access to records and pillars is dependent on job function and security.
- Limited to creating only up to 6 joins in a single query.
- Follows the Query Development Life Cycle (QDLC) standards.
- Liaison between college report requester and the SBCTC ctcLink Reporting Team.
- Understands and uses query search tools prior to submitting requests.
- Requires passing ctcLink PeopleSoft Query 101 Basics and QDLC training with an assessment score of 80% or higher in each course. **PeopleSoft Query 101 is a competency based course and may be passed by only completing the assessment successfully, if desired.**

New Query Developers will need to follow the subsequent process to be granted access to Query Manager in PCD:
Advanced Query Developer

- Access to Query Manager in PCD.
- Access to records and pillars is dependent on job function and security.
- No limit on the number of joins used in a single Query.
- Follows the Query Development Life Cycle (QDLC) standards.
- Liaison between college report requester and the SBCTC ctcLink Reporting Team.
- Understands and uses query search tools prior to submitting requests.
- Requires passing PS Query 101, 201, 301, 401 and QDLC training with an assessment score of 80% or higher for each course. PeopleSoft Query 101, 201, 301 and 401 are competency based courses and may be passed by only completing the assessments successfully, if desired.

Query Developers will need to follow the subsequent process to be designated an Advanced Query Developer:
Report Developer

Report developers enjoy all of the same benefits and access levels as Advanced Query Developers with the addition of access to BI Publisher and Connected Query or to Pivot Grid and Composite Query for true report development.

- Access to Query Manager in PCD.
- Access to records and pillars is dependent on job function and security.
- No limit on the number of joins used in a single Query.
- Follows the Query Development Life Cycle (QDLC) standards.
- Liaison between college report requester and the SBCTC ctcLink Reporting Team.
- Understands and uses query search tools prior to submitting requests.
- Access to BI Publisher and Connected Query and/or access to Pivot Grid and Composite Query.
- Must be an Advanced Query Developer as well as pass the BI Publisher 101 or the Pivot Grid 101 training with an assessment score of 80% or higher. Users are able to select their track – either BI Publisher or Pivot Grid. Access is granted based on the selection so BI Publisher access is granted to users who pass the BI Publisher 101 course and Pivot Grid access granted to those who pass the Pivot Grid course. Users are not limited and may select to complete both tracks as desired. BI Publisher and Pivot Grid 101, 201 and 301 are competency based courses and may be passed by only completing the assessments successfully, if desired.

Advanced Query Developers will need to follow the subsequent process to be granted Report Developer access to Query Manager in PCD.

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**Moving from Advanced Query Developer to Report Developer**

- **PCD Environment**
  - **Advanced Query Developer** notifies the Reporting Lead that supervisory approval to move up to a Report Developer has been received.
  - **Has the Advanced Query Developer passed either the BI Publisher 101 or the Pivot Grid 101 with a passing grade on all assessments of 80% or higher?**
    - **NO**
      - Advanced Query Developer must meet all requirements before being approved as a Report Developer.
    - **YES**
      - Data Services will update tracking of the Query Developer to a Report Developer.
      - Data Services submits a service desk ticket to SBCTC Security for Report Developer Query Manager access in selected pillars with approvals attached.
      - Data Services reviews Advanced Query Developer’s qualifications and approves request.
      - The Reporting Lead submits a ticket to Data Services with the request and attaches supervisor’s approval.

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**Report Developer**
SECTION 2 – ctcLink PeopleSoft PCD Query Development Lifecycle

This section is designed to instruct users on the correct protocol and conventions to follow when creating a query in the PCD environment. Section 2 covers in detail the Query Development Life Cycle and each phase of query development. At the end of this section users will be able to:

1. Describe the 4 phases of the Query Development Lifecycle.
2. Detail how FA queries are treated differently than other queries.
3. Describe the benefits of searching for queries using metaLink.
4. Define the methods used to find records and fields to be used in query development.
5. Describe query development conventions and protocol in query creation and modification. Including:
   a. Query Naming Convention
   b. Query Description
   c. Query Definition
   d. Prompts Utilization
   e. Public vs Private Queries
   f. Query Folders
   g. Query Performance
6. Define the purpose of the Query Migration Request Form
7. List what possible modifications may be made to an existing query and the steps a Query Developer must take before modifying any existing query.
8. Explain why delivered queries should never be modified.

ctcLink PeopleSoft Query Development Lifecycle Chart

There are 4 phases of query development.

- **Phase 1 – Query Development in PCD**
  - Search for existing queries that may meet the need first before developing a new query.
  - Always follow the correct protocol and conventions when developing a new query.
    - Financial Aid query creation requires approval from the financial aid team.
- **Phase 2 – Request migration of the query from PCD to PRD.**
  - Queries written in PeopleSoft Query should normally be written in the Production College Development (PCD) environment. This means that for a query to be used in the production environment (PRD) it must first be copied to PRD from PCD. This process is known as Query Migration. Queries are migrated on Tuesdays and Thursdays. Cut-off for inclusion is 12:00 pm. Queries received for migration after 12:00 pm on these days will migrated on the next Migration Day.
- **Phase 3 – The query is reviewed and then migrated by SBCTC.**
  - This review process ensures consistency across query development.
- **Phase 4 – Optional Phase that pertains to modifying queries that already exist in production.**
  - There are only 2 modification types allowed:
    - Adding a prompt to an existing query
    - Adding an additional field that does NOT result in row duplication
  - All modifications must first be approved by the original Query Developer or by Data Services.
    - Financial Aid query modifications also require approval from the financial aid team.
Modifications must be done in PCD and then migrated to PRD. Modifications of existing queries is not allowed in PRD.

Below is a summary depiction of the ctcLink Query Development Life Cycle (QDLC). The pages that follow will provide additional details related each phase and step in this process.

**Phase I: Develop Query in PCD**
- Search for an existing query or report. Develop in PCD environment.
- Use standard naming convention.
- Add description to query property.
- Add definition to query property.
- Add prompts whenever possible instead of hard coding criteria.
- Make public.
- Store in logical folder.
- Test the Query for accuracy, performance and data validation.

**Phase II: Request Migration to Production (PRD)**
- Submit Service Desk ticket to migrate query to Production.
- Include completed Query Migration Request form with ticket ensuring the query passes all “Pre-Migration Checklist” requirements.

**Phase III: Data Services Migration to Production (PRD)**
- Query will be tested for compliance and functionality by Data Services.
- Data Services submits migration request to Application Services.
- Query will be added to View Query Search Listing in metaLink. For access to metaLink please email pmcdaniel@sbctc.edu or cmckenzie@sbctc.edu.

**Phase IV: Modification of Existing Query**
- Understand how a modification will impact the original purpose
- Determine if a modification is acceptable, or if a new query needs to be developed. If modifying an existing query, make a copy first.
- Check if the change is acceptable to original Query writer or if not able to locate this person, check with Data Services for approval to change.
- Repeat QDLC starting at the second step of Phase I
- If desired, request that the original query be removed from PRD
PHASE I: Query Development

Search for Existing Queries or Reports before Developing New Queries

Always search existing queries or reports before creating a new query. This can potentially save a large amount of time and resources. If a query is found that is close, it can use that as a foundation for the new query by using “Save As”. (See Phase IV of the QDLC) As all colleges will have access and be storing their queries in the same place, it is likely a usable query has already been developed. Note: All FA queries, whether new or modified must first be approved by the Financial Aid team.

While we will be learning how to search in the PeopleSoft Query 101 Basics course, it is important to note that there are various methods for searching for queries; either in PeopleSoft or in metaLink.

PeopleSoft Query Basic Search

- 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

PeopleSoft Query Advanced Search

- Search using the Operator’s:
  - <
  - <=
  - =
  - >
  - >=

- Search using any of the Operators listed above by multiple criteria including:
  - Access Group Name
  - Description
  - Folder Name
  - Owner
  - Query Name
  - Type
  - Uses Field Name
  - Uses Record Name

Searching for Queries within metaLink

metaLink is a Data Dictionary provided by Data Services where users can search for Queries, Reports and Records. MetaLink offers the benefit of being able to search for Queries based on the Definition Field (Long Description) which has no character limit but is not available in PeopleSoft Query searches for anyone who is not a Query Developer. As the Description field, which all users can view, only has a 30 character limit, being able to search on the Definition field is a major benefit to performing query searches using metaLink. Users can also use metaLink to search for both field and record information to gain valuable insight into the data structure, as well as search for existing Queries or Reports. Using metaLink is covered in the PeopleSoft Query 201 Intermediate course.

The key features of metaLink allow designated users to:
  - Document structures and properties for a given record or field
  - Track and record changes by user, date, and what was changed
  - View data dictionary reports
  - View the ctcLink reporting catalog
  - Search for available queries
  - In order to gain access to metaLink, first request a password. Please submit all requests for metaLink passwords to: Carmen McKenzie or Paula McDaniel. cmckenzie@sbctc.edu or pmcdaniel@sbctc.edu.
Develop a New Query in PCD Environment

In general, there are three environments in our system’s PeopleSoft infrastructure: Development (PDV), Quality Assurance (PCD) and Production (PRD). Each environment contains the three pillar instances: Campus Solutions (CS), Finance (FIN) and Human Capital Management (HCM).

Designated Query Developers develop their queries in the PCD environment, not in the PRD environment unless special access has been granted. This ensures that the queries in PRD have been tested, meet standards and do not affect PRD performance. Why do we not first develop in the PDV environment? Because Query Developers are developing queries, not views, tables, pages, or procedures, developing in PCD is acceptable and reduces the development time by eliminating one migration request step. The PDV environment is also refreshed at a slower rate than the PCD environment.

Some developers prefer to store their draft queries in a personal folder, just make sure that the folder name of the final query has been added to the correct folder name prior to requesting migration. A list of accepted folder names can be found in the Query Organization – Folders and Favorites section. Folder names are free text and are automatically migrated with the query.

Finding Records to Use in Query Development

One of the most challenging steps in developing a query, especially for those new to PeopleSoft, is to determine which table (record) contains the data needed. We will learn the steps for using shortcut keys/extensions to find record and field information in the ctcLink PeopleSoft Query 201 Intermediate course, however the shortcut keys and extensions are included here as a reference for the correct processes to follow for finding the records and fields which are being written to from a particular front end page.

CNTL + SHIFT + J

One trick to determining the record is to first locate the PeopleSoft page where the data is entered. While on that page, use the keystrokes CNTL + SHIFT + J. This will bring up a new page that lists the technical Page name. This functionality is only available in the PCD environment.

Next, run the query QXX_PSPNLFIELD where XX is the Pillar acronym. The query will prompt for the Page name. The query will then return each field shown on the page and the corresponding record and field names.

CNTL+SHIFT+C

Another method of finding record and field information is to use CNTL+SHIFT+C if using google Chrome as the browser. Use a mouse to hover over the field to see the field and record name. This tool will only work in Chrome and Firefox. This tool is not available in Internet Explorer.

PSChrome Extension

Also consider downloading the PSChrome Extension. It is available to search for at: https://google.com/chrome/webstore Search for “PeopleSoft” in the search bar and then download PSChrome. The extension allows for searching page information and field information from any PeopleSoft screen.
Naming Conventions

Queries

Queries should all follow the same naming convention which keeps them from being dropped or deleted by changes to the environment. This convention also aids in searching and identification.

The correct protocol is to start the query name with Q for Query or V for View followed by:
- FS – for Finance
- CS – for Campus Solutions
- HC – For Human Capital

For example, a query for Campus Solutions would start with QCS. This beginning section of the name is then followed by the two character module abbreviation which is then in turn followed by a description. As query names do not allow for spaces or special characters, use underscores for spaces.

Note: Only Data Services or ctcLink project staff are allowed to create Views.

An example of a correctly formatted query name is:
QCS_AA_ENROLLED_NO_ADVISOR

Module Acronyms and Names

To see the list of module acronyms and names by pillar please click HERE

See BI Publisher Information for details on BI Publisher Reports naming conventions. See Connected Query Information for details on Connected Query naming conventions.

Query Description and Definition

Describe the query using the Query Property Description and Definition fields.
- The Description field is 30 characters. Try to use a description that will best identify the query and will also facilitate searching.
- The Definition field allows for an unlimited number of characters. Use this field for a detailed description of the query to include its use, association to a business process, any criteria that has been applied and the original creator of the query.

Include the following in the Query Definition field:
- Detailed description of purpose of query
- Any specific criteria applied, for example “Selects using Student Group SINT”
- Include key search terms
- Describe any changes or updates made to an existing query including approval for the modification.
- College code and email address of developer, for example, 890: pmcdaniel@sbctc.edu
- Date query was created or updated
- Business process number, if applicable.

Prompts Utilized Where Possible

Runtime Prompts are pop-up selection windows which appear when the query is ran that asks the end user to enter or select something from a list – for example, a specific Institution. It is important to keep in mind that prompts should be used as much as possible to increase the value of the query. If a query is developed for a specific institution, that query will only ever be good for that institution, however if a prompt is used where
the end user selects which institution they work for; the query now becomes usable for everyone regardless of institution. Queries should be tested for prompts before migrations. Queries not using prompts where possible will not be migrated.

To see the list of commonly used Prompt Tables pillar please click HERE

**Public not Private**

Queries in PCD can be saved either private or public. ctcLink Queries in being migrated from PCD to PRD should always be saved as public so that other Query Developers are able to see and use them. If all Queries are public and able to be searched it will prevent the duplication of effort that could happen if a query was private and not visible to others on the team and then reproduced.

**Query Organization – Folders and Favorites**

Folders can be used to categorize and organize Queries. Queries may only be stored in one folder at a time. Query folder organization is defined in the list below. If a new folder assignment is desired, please submit a ticket for Data Services. Some developers prefer to store draft queries in PCD in a personal folder, which is acceptable, just make sure to remove or change the folder name prior to making a migration request. Queries not in the appropriate folder will not be migrated. In addition to Folders, users may also save Queries in a favorites list for easy access and organization.

**ctcLink Folders**

To see the list of query folder names by pillar please click HERE

**Test the Query**

Once the development of the query has been completed, the next step is to test that it adheres to the Query Development Standards outlined previously in this document. Testing the query prior to submitting a migration request will ensure that the migration into the production environment will happen quickly, typically overnight. It may be helpful to use the Query Migration Form, shown on the following page, as a guide to query testing.

**Performance Standards**

Users will also need to test that their query is efficient and does not take too long to run. Inefficient Queries can use up valuable resources. The best way to ensure the query is efficient is to run it and verify that its run-time is less than one minute, preferable just a few seconds. Also aim to have the smallest number of records returned by the query as possible. A good sign that the query is returning too many records is if the message “Query Result Set Too Large” is received indicating that scheduling the query is required in order to get the full results.

**PHASE II: Submit a Migration Request**

The last step in the development process, and the second phase of the overall QDLC, is to request the query be migrated into the PRD environment. Follow the steps below:

- Log in into SBCTC Service Desk
If not prompted into the Request screen, click in the “Request” icon.

On Request Type select “ERP Support”, this will bring a second drop-down list.
Select “Data & Reporting”, this will bring a third drop-down list.
Select “Migration Request”.

Fill in the “Subject” field.
Describe the request with as much detail as possible.
Choose the PeopleSoft Pillar from the drop-down list.
From the “Instructions” field, click on the link “Query Migration Request Form” to open the form.
Click “Enable Editing” button and completely fill out the form
- Source Environment is normally PCD
- Target Environment is normally PRD
Fill out the Query Migration Request form completely.
Click “Save As” to save the form the users’ PC (the completed form needs to be attached in the Migration Request)

The Next step is to add the Query Migration Request Form:

- Click “Add File” button
- Click “Browse” to find the file
- Once found click “Open”
- Click “Upload”, once done the file name should be seen below the “Add File” button
- Location stays as SBCTC.
- Finally click “Save”

To see the Query Migration Request form example please click HERE (https://www.sbctc.edu/resources/documents/colleges-staff/data-services/peoplesoft-ctclick/query-migration-request-form.pdf)

The Migration Request form is used by Data Services and helps ensure that the Query Developer has reviewed their query for compliance and performance before submitting for migration. This form can also be used as a guide during development work to make sure the standards described in this document are being adhered to.
PHASE III: Migration to Production
Data Services will review the query for compliance and functionality. If there are any concerns with the query or its compliance to any of the standards listed in this document, it will be sent back to the developer to resolve before migration. Once the query is approved by Data Services it is sent to the Application Services team for migration. The query will be added to View Query Search Listing in metaLink. For access to metaLink please email pmcdaniel@sbctc.edu or cmckenzie@sbctc.edu.

PHASE IV: Modification of Existing Queries

Modifying Queries Created by Others

Please do not modify any existing queries without first analyzing the impact of the modification with the original creator or the ERP Pillar lead. Approval is always required to make a modification to an existing query. Some queries are used for business processes and changing the criteria may have a negative impact on the process.

If a query is found that is very close to what is needed but that is not quite right, it is absolutely okay to use that query as a base that can then be changed to fit current needs. The caveat is that “Save As” must be used to save the query to a new name which can then be modified. All FA queries, whether new or for a modification must first be approved by the Financial Aid team.

Modifying QXX, or VXX, or CTC_ (where XX is the pillar acronym)

- First try to determine who created the query by looking at the definition within the Query Properties. If no name, look to see who the last to modify the query was. If unable to determine a specific person to ask for approval, assign to the ERP Pillar Lead via the Service Desk to request the modification. Once ERP Support has made their decision the query will be assigned to Data Services.

Modifying CTC_FA Financial Aid Queries

- Any and all Financial Aid queries, both new query requests and modification of existing queries need to be approved by the SBCTC Financial Aid team.
  Assign to the Financial Aid Pillar Lead via the Service Desk to request the modification.

Modifying Delivered Queries
Queries that are delivered by Oracle are found in the DELIVERED folder. These queries do not follow the QXX or CTC naming convention. If a Query Developer makes a modification to one of these queries any changes made will be overwritten and lost at the next system upgrade. Therefore, all changes to a delivered query must be saved using the “Save As” button. The new queries must follow the standard conventions listed in this training course.
SECTION 3 – ADDITIONAL INFORMATION & CONVENTIONS

This section is designed to present users with additional information regarding query conventions and protocol including who owns which queries and reports and naming conventions for BI Publisher and Connected Queries. At the end of this section users will be able to:

1. Describe how query pre-fixes can aid in recognizing the owner of the query or report.
2. Explain BI Publisher reports naming convention.
3. Explain connected query naming convention.

Who Owns What Queries And Reports?

Queries

When the first three characters of the query or view name =
- **QXX** or **VXX** (where **XX** is the pillar acronym) = **Data Services**
- **CTC** = Now owned by Data Services. Historically, some “CTC_” queries were owned and warrantied by **Ciber**, but others were developed by functional project staff.
- **Not QXX, VXX or CTC (DELIVERED)** = if the query does not begin with any of these prefixes then it is a delivered query and is owned by Oracle.

Financial Aid Queries

When the first five characters = **CTC_FA** the query is owned by the SBCTC Financial Aid team.

Any and all Financial Aid queries, both new query requests and modification of existing queries need to be approved by the SBCTC Financial Aid team.

Reports

- **DELIVERED** reports = Oracle
- Developed reports in menu **CTC_Custom** = Originally created by Ciber. Now owned by Data Services.
- Developed BI Publisher reports **BXX** (where **XX** is the pillar acronym) = Data Services. See **BI Publisher** for more information.

Additional Conventions

While creating queries will be the main area most Query Developers will work in there are additional reporting tools that will become available for use as the Query Developer gains skill and knowledge. Following the correct conventions when using these tools is also very important for consistency and continuity in searching.

BI Publisher Conventions and Protocol

BI Publisher is a PeopleSoft delivered reporting tool that allows users to choose the output type of a report and for specific formatting and presentation of data. These reports use queries or connected queries as data sources. BI Publisher reports follow the same naming convention as standard queries with the caveat that they will begin with **B** which stands for BI Publisher.

- **Example**: **BFS_EX_GLBAL**

  B/Pillar  Module  Description

  ```
  BFS_EX_GLBAL
  ```
Queries used as data sources for BI Publisher should have a BI designation at the end of the query or Connected query name.

- Example:
  - Query - QFS_AR_ITEM_DST_GL_BI

Connected queries are only used as data sources for BI Publisher Reports so it is not necessary to designate them for BI Publisher usage.

- Example:
  - Connected Query - CQCS_SF_ITEM_DUE_AS_OF

**Connected Queries Conventions and Protocol**

PeopleSoft Connected Query allows for the creation of a single XML file based on a set of queries with parent-child relationships. Connected queries are only used as data sources within BI Publisher at the State Board. It is important to designate which queries make up part of a connected query and what their role is within the connected query. There is a 30 character limit on the connected query’s name.

Connected queries can be ‘broken down’ into three parts:

- Connected Query – hierarchal object created from multiple existing queries which produces the XML output
- Parent Query - A parent query in a connected query is a query that has one or many child queries. The top level query in a connected query is the parent query.
- Child Query - A child query in a connected query is a query that has a single parent query. A child query can have one or more sibling queries. Fields in a child query are mapped to related fields in the immediate parent query.

**Tying the Pieces Together**

The connected query is designated by the prefix CQXX where XX is the pillar name. The parent connected query is designated by the suffix CQP. Each child connected query is designated by the suffix CQ and the child number. The descriptive portion of the names for the final connected query report, the parent query and the child queries should be the same for continuity.

- Example:
  - Connected Query: CQHC_PY_PAYROLL_REGISTER_RPT
  - Parent Query: QHC_PY_PAYROLL_REGISTER_BI_CQP
  - Child Queries: QHC_PY_PAYROLL_REGISTER_BI_CQ1
  - QHC_PY_PAYROLL_REGISTER_BI_CQ2
  - QHC_PY_PAYROLL_REGISTER_BI_CQ3

- Note that all queries share the same base name.

**Connected Queries**

Connected queries are found in the Connected Query Manager or Connected Query Viewer. The connected query creates the final XML output that is then used as a data source for BI Publisher. A connected query is created by connecting multiple queries together. The prefix CQXX is used to designate a connected query. As the output is only used for BI Publisher reports at the State Board there is no need to add the BI at the end of the name to designate use for BI Publisher; it is implied.

**Connected Query Naming Convention**

CQXX_XX_XXX......XXXX – where CQ stands for Connected Query

- Example: CQHC_PY_PAYROLL_REGISTER_RPT
**Connected Query Description Properties:**
For the connected query description enter CQ at the end of the description to denote a connected query.
- Example: “Payroll Register Report CQ”

**Connected Query Definition:**
Connected queries do not have the standard Definition field found in Query Manager. Related queries are listed in the body of the connected query manager page and do not have to be further defined.

**Parent Queries**
Parent queries are standard queries found within Query Manager so it is important to designate them appropriately so they do not get used or modified incorrectly.

**Parent Query Naming Convention**
QXX_XX_XXX......XXXX_CQP – where CQP stands for Connected Query Parent
- Example: QHC_PY_PAYROLLREGISTER_BI_CQP

**Connected Query Parent Description Properties:**
For the Parent Query Description: Enter CQP at the end of the description to designate a Connected Query Parent query.
- Example: “Payroll Register Report -CQP”

**Connected Query Parent Definition Properties:**
Enter additional details regarding the Parent Query including the Child Queries.
- Example: 890:lpetersen@sbctc.edu 10/04/2017 Parent Connected Query.
  Child Queries: QHC_PY_PAYROLLREGISTER_BI_CQ1  
  QHC_PY_PAYROLLREGISTER_BI_CQ2  
  QHC_PY_PAYROLLREGISTER_BI_CQ3

**Child Queries**
Child queries are standard queries found within Query Manager so it is important to designate them appropriately so they do not get used or modified incorrectly.

**Child Query Naming Convention**
QXX_XX_XXX......XXXX_CQ1 - where CQ1 stands for Connected Query Child 1
QXX_XX_XXX......XXXX_CQ2 - where CQ2 stands for Connected Query Child 2
QXX_XX_XXX......XXXX_CQ3 - where CQ3 stands for Connected Query Child 3
- Example: QHC_PY_PAYROLLREGISTER_BI_CQ1  
  QHC_PY_PAYROLLREGISTER_BI_CQ2  
  QHC_PY_PAYROLLREGISTER_BI_CQ3
Connected Query Child Description Properties:
For the Child Query Description: Enter CQX at the end of the description to designate Connected Query Child y with X being the Child Query number.

- Example: “Payroll Register Report -CQ1”

Connected Query Child Definition Properties:
Enter additional details regarding the Child Query including the query number and the Parent Query.

- Example: 890:lpetersen@sbctc.edu 10/04/2017
  First Connected Query Child.
  Parent Query – QHC_PY_PAYROLL_REGISTER_BI_CQ1

Sharing a Private Query
Though we will learn about using Query Manager in the ctcLink PeopleSoft Query 101 Basics course, the steps to share a private query through the action ‘copy to user’ are as follows:

1. Check the ‘Select’ box next to the query to be copied.
2. Select the Action ‘Copy to User’.
3. Click ‘Go’.
4. Enter the User ID of the person with whom to share the query.
5. Click OK
6. Review the success message.

For more information on Query Manager Options please review the ctcLink PeopleSoft Query Training Manual [Query Manager Options](#) section (Page 17).