**ctcLink PeopleSoft Query Development Lifecycle PCD**

Queries written in PeopleSoft Query should 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. All queries should first be written in PCD and then migrated to PRD. Queries are migrated on Tuesdays and Thursdays.

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 are 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.
- **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 are 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

Requirements for Query Manager Access in PCD
The document Structure for Query Manager Access discusses all of the requirements for access to query manager in PCD in more detail however the basic requirements to gain access to query manager in PCD is to turn in a signed Non-Disclosure Agreement as well as complete both the 101 Basics course as well as the QDLC course.

Non-Disclosure Agreement
Another security measure initiated by Data Services is the Non-Disclosure Agreement (NDA). Each query developer is required to sign this document and have their Reporting Lead sign it as well. If a signed NDA is not received by Data Services access to Query Manager in PCD will not be granted. Once signed (electronic signatures are acceptable) return it to Paula McDaniel – pmcdaniel@sbctc.edu or Carmen McKenzie – cmckenzie@sbctc.edu. The same form is used for dataLink developers as well as query developers. Note that as a query developer only the signature of the developer and reporting lead is required. It is not necessary to have the IT Director also sign it as that is the process for dataLink developers. The link for the NDA is here: Non-Disclosure Agreement.

Required Courses for Access to Query Manager
Query developers must pass the final assessments for the Query Development Life Cycle (QDLC) course as well as the ctcLink PeopleSoft Query 101 Basics course with a score on the final assessment of 80% or better. These are competency-based courses so it is only necessary to complete the final assessments successfully if the developer already possesses the knowledge shared in the courses. Everyone with a ctcLink login will have access to Query Viewer to view queries and reports.
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 search 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 same search criteria as the basic search but with the choice of the following operators:
  - <
  - <=
  - =
  - >
  - >=
  - Begins With
  - Between
  - Contains
  - In
  - Not =

**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, reports and pivot grids
  a. 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. 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.

The PCD environment is refreshed on the first Monday of every month from PRD. The environment is available for use Monday – Friday from 7 am to 7 pm.

FERPA and the Name Field
When displaying a name in query results it is required to add the field FERPA_BLOCK to the query results as well. To do this the query developer will use the VCS_BIO_PRIORTY or the VCS_BIO_PRIMARY records to add the name. No other record is allowed to be used for this purpose. The VCS_BIO_PRIORTY will prioritize the preferred name if it is available while the VCS_BIO_PRIMARY will prioritize the primary name if it is available. Both of these views will then display other name types if either primary or preferred is not available.

Data Dump Queries
As development is not allowed in PRD and there may be times that data from PRD is required immediately there is protocol for creating and using data dump queries. Please see Data Dump Query Protocol for more information.

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
It is extremely important to follow the proper naming conventions when developing queries. Query names reflect the query owners as well as facilitate searching. Additionally improperly names queries in the PCD environment could potentially be deleted if they do not follow the correct conventions.

Queries Being Migrated to Production
Queries should all follow the same naming convention which 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```
Queries in Development in PCD

Queries that are in development in the PCD environment MUST begin with DEV_. Change the name to the standard naming convention for queries in production when migrating the query. Before migration maintain the naming convention of DEV_. **Queries that do not have DEV_ as their prefix will be lost during refreshes of the PCD environment.**

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.

When formatting the entry for the Definition field please follow these guidelines:

- If the query is to be modified by SBCTC only then the first line of the query definition box will be “**Edited by SBCTC only**”. This must remain as the first statement within the Query Definition box. If the query is to be edited by colleges then only the normal entries are needed.
- All entries will be separated with a dashed line.
- All entries will appear in descending order by date below this entry.

Example

** Edited by SBCTC only**

----------------------------------------------

890:tmorrill@sbctc.edu 07/22/2019
Updated listing for HS records/fields
----------------------------------------------
Prompts

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 must be developed for every query to increase the value of the query and for security. 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 their institution the query now becomes usable for everyone regardless of institution. Queries will be tested for prompts before migrations. Queries not using prompts will not be migrated.

Query Prompt Table Security

Though query security is determined based on the roles assigned to each developer, it is required to add an additional layer of security through prompts. As stated above, all queries in all pillars should include an Institution, Business Unit or SETID prompt. Any exceptions to this rule must first be approved by Data Services. In the CS pillar, for example, all queries should contain a prompt on the INSTITUTION field where the query developer must use the record INSTITUTN_SCRTY, which is a secure record, as the Prompt Table record. In other pillars if there is a secure record available to use as the Prompt Table it is necessary to use it. For example, the FS field BUSINESS_UNIT requires the Prompt Table record SP_BU_GL_CLSVW to be used in the prompt. Whenever there is a security record available to use as a Prompt Table record it is required to do so. Required security Prompt Tables as well as other recommended Prompt Tables for fields not tied to security are found in the document Prompt Tables to Use.

Commonly Used Prompt Tables

To see the list of commonly used Prompt Tables per 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.

To see the list of query folder names by pillar please click HERE (https://www.sbctc.edu/resources/documents/colleges-staff/data-services/peoplesoft-ctclink/query-folder-names-list-aug-2018.pdf)

In addition to Folders, users may also save queries in a favorites list for easy access and organization.

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 “Data Services”, this will bring a second drop-down list.
- Select “ctcLink Reporting”, this will bring a third drop-down list.
- Select “Migration Request”.

Page | 9
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 attach the Query Migration Request Form to the Migration Request:

- 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-ctclink/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.

Query Migrations occur twice a week on Tuesdays and Thursdays.

If you intend to have your query migrated on Tuesday, the latest time to submit your migration request ticket is Monday at 3pm. If your ticket is not in, on or before 3pm, your query will be migrated during the next migration window which is Thursday.

Also, if you intend to have your query migrated on Thursdays, please submit your migration request ticket by Wednesday at 3pm. If your ticket is not in, on or before 3pm, your query will be migrated during the next migration window which will be the following Tuesday.

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

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.

Other Reporting Tools Development Convention and Protocol
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.

BI Publisher Naming Convention
The naming convention for BI Publisher reports only begins with B instead of BI in order to save space as the name can only be 12 characters long.
- Example: BFS_EX_GLBAL
  B/Pillar Module Description

BI Publisher Description
Enter a brief description of the report.

BI Publisher Definition
BI Publisher reports do not have the standard Definition field found in Query Manager. Enter as much information as possible into the query(ies) which will form the data source for the BI Publisher report.

BI Publisher Folder
BI Publisher reports are not stored in folders. The standard queries that make up the BI Publisher report are. Any standard query used in a BI Publisher report will be stored in the BI Publisher folder.

BI Publisher Data Sources
Though each will be explained in more detail below is a list of each of the possible data sources for BI Publisher reports.

- PS Queries
- Connected Query
- Composite Query (8.57)

PS Queries for BI Publisher
Queries used as data sources for BI Publisher should have a BI designation at the beginning of the query name.
- Example:
  - Query - BIFS_AR_ITEM_DST_GL
Queries used in BI Publisher must be stored in the BI Publisher folder.

**Connected Queries for BI Publisher**

Connected queries are only used as data sources for BI Publisher Reports as they only produce XML. 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 the 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. The top level query should normally be where prompts are used.
- **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.

Connected queries are found in the Connected Query Manager or Connected Query Viewer but only produce XML. A connected query is created by connecting multiple queries together by mapping related field with one query being the parent query and the other queries being child queries. An example of when to use a connected query would be for a report which includes detailed as well as totaled information. The connected query creates the final XML output that is then used as a data source for BI Publisher. The connected query is designated by the prefix CQXX where XX is the pillar name. The parent query is a standard query and is designated by the prefix BIXX since it will be used in a BI Publisher report and a suffix CQP to designate it as a parent query. Each child query is a standard query and is also designated by the prefix BIXX as it will be used in a BI Publisher report and a suffix CQ and the child number to designate it as a child query. The number does not denote any particular order but is instead just a way of differentiating each child query since 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. Use the description field for each query to provide a short description of the purpose of the query.

- **Example:**
  - Connected Query: CQHC_PY_PAYROLL_REGISTER_RPT
  - Parent Query: BIHC_PY_PAYROLL_REGISTER_CQP
  - Child Queries: BIHC_PY_PAYROLL_REGISTER_CQ1, BIHC_PY_PAYROLL_REGISTER_CQ2, BIHC_PY_PAYROLL_REGISTER_CQ3

- All queries share the same base name.
- Parent and children queries should be stored in the folder BI PUBLISHER

- **Example:**
  - Connected Query - CQCS_SF_ITEM_DUE_AS_OF

**Connected Query for BI Publisher Naming Convention**

Connected Queries will begin with CQ.
CQXX_XX_XXX......XXXX – where CQ stands for Connected Query

- Example: CQHC_PY_PAYROLL_REGISTER_RPT
  CQ/Pillar Module Description

Connected Query Description Properties:
Enter the description of the report

- Example: “Payroll Register Report”

Connected Query Definition Properties
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.

Connected Query Parent and Child 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. They will start with BI as they will be used in a connected query which will be the data source for a BI Publisher report.

Parent Query Naming Convention
BIXX_XX_XXX......XXXX_CQP – where CQP stands for Connected Query Parent

- Example: BIHC_PY_PAYROLL_REGISTER_CQP
  BI/Pillar Module Description Connected Query Parent Suffix

Queries used in BI Publisher must be stored in the BI Publisher folder.

Parent Query Description
Enter a brief description of the query.

- Example: “Payroll Register Report by College”

Parent Query Definition
Enter additional details regarding the Parent Query including the Child Queries.

- Example: 890:lpetersen@sbctc.edu 10/04/2017
  Parent Connected Query
  Child Queries: BIHC_PY_PAYROLL_REGISTER_CQ1
  BIHC_PY_PAYROLL_REGISTER_CQ2
  BIHC_PY_PAYROLL_REGISTER_CQ3

Child Query Naming Convention
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. They will start with BI as they will be used in a connected query which will be the data source for a BI Publisher report.

BIXX_XX_XXX......XXXX_CQ1 - where CQ1 stands for Connected Query Child 1
BIXX_XX_XXX.......XXXX_CQ2 - where CQ2 stands for Connected Query Child 2
BIXX_XX_XXX.......XXXX_CQ3 - where CQ3 stands for Connected Query Child 3

- Example:

  BIHC_PY_PAYROLL_REGISTER_CQ1
  BIHC_PY_PAYROLLREGISTER_CQ2
  BIHC_PY_PAYROLLREGISTER_CQ3

  Bl/Pillar  Module  Description  Connected Query Child Number Suffix

Queries used in BI Publisher must be stored in the BI Publisher folder.

**Child Query Description**

Enter a brief description of the query.

- Example: “Payroll Register Report Totals”

**Child Query Definition**

Enter additional details regarding the Child Query including the query number and the Parent Query.

- Example: 890:lpeterson@sbctc.edu 10/04/2017
  
  First Connected Query Child.
  
  Parent Query – QHC_PY_PAYROLL_REGISTER_CQ1

Note: Only Report Developers who have completed the required training will have access to Connected Query in PCD. Please see [Query Developer Levels and Access to Reporting Tools in PCD](#) for more information.

**Composite Queries for BI Publisher**

Composite queries will be available as a BI Publisher data source in version 8.57.

Composite query enables you to combine data from existing base queries and then apply filters, aggregates, and so on before presenting the report results, which show the combined data set. Composite query retrieves multiple levels of related information on existing base queries and presents the combined data as a single and flattened query result. The composite query is comprised of multiple base queries. They can be used as a data source for pivot grids. It is important to designate which queries make up part of a composite query and what their role is within the composite query. There is a 30 character limit on the composite query’s name.

Composite queries can be ‘broken down’ into two parts:

- Composite Query – hierarchical object created from multiple existing queries.
- Base Query - A query that is joined by field to other queries then tied together as a composite query that can be used as a data source for pivot grid.

Composite queries are found in the Composite Query Manager. A composite query is created by connecting multiple queries together. The composite query is designated by the prefix COXX where XX is the pillar name. The base queries are designated by the suffix COX where X is the base query number. The descriptive portion of the names for the final composite query and the base queries should be the same for continuity.

- Example:
  
  o  Composite Query: COHC_PY_COMPOSITE_EXAMPLE
  o  Base Queries: BIHC_PY_COMPOSITE_EXAMPLE_CO1
Note that all queries share the same base name.

**Composite Query for BI Publisher Naming Convention**
COXX_XX_XXXXXX – where CO stands for Composite Query

- Example: CCOCS_PY_COMPOSITE_EXAMPLE
  
**Composite Query Description Properties:**
Enter a brief description of the composite query.

- Example: “Payroll Register Report”

**Composite Query Definition Properties:**
Composite queries do not have the standard Definition field found in Query Manager. Base queries are listed in the body of the composite query manager page and do not have to be further defined.

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

**Composite Base Query Naming Convention**
BIXX_XX_XXX......XXXX_CO1 - where CO1 stands for Composite Base Query 1
BIXX_XX_XXX......XXXX_CO2 - where CO2 stands for Composite Base Query 2
BIXX_XX_XXX......XXXX_CO3 - where CO3 stands for Composite Base Query 3

- Example: BIHC_PY_COMPOSITE_BASE_CO1
  BIHC_PY_COMPOSITE_BASE_CO2
  BIHC_PY_COMPOSITE_BASE_CO3
  
**Composite Base Query Description Properties:**
Enter a brief description of the query.

- Example: “Payroll Register Report”

**Composite Base Query Definition Properties:**
Enter additional details regarding the Base Query including the name of the Composite Query.

- Example: 890:lpeterson@sbctc.edu 10/04/2017
  Composite Base Query.
  Composite Query: CCOCS_PY_COMPOSITE_EXAMPLE
Note: Only Advanced Query Developers who become Report Developers by completing the required training will have access to BI Publisher in PCD. Please see Query Developer Levels and Access to Reporting Tools in PCD for more information.

**Pivot Grid Conventions and Protocol**

Pivot Grid will allow Query Developers to create graphical representations of data in a visually effective and efficient manner. Pivot Grids can use queries, components or composite queries as a data source.

**Pivot Grid Naming Convention**

The pivot grid naming convention is: PGXX_XXXXXXXXX.

- Example: PGCS_FTE_SUMMARY
  
  PG/Pillar Description

Note: Only Advanced Query Developers who become Report Developers by completing the required training will have access to Pivot Grid in PCD. Please see Query Developer Levels and Access to Reporting Tools in PCD for more information.

**Pivot Grid Description**

The pivot grid description field is the only area where developers can enter notes about the grid. There is no definition field for a pivot grid, however there does not seem to be a character limit on the description field. Include as much of the following as possible when entering the description:

- Detailed description of purpose of pivot grid.
- Any specific aggregation applied.
- Include key search terms
- Describe any changes or updates made to an existing grid including approval for the modification.
- College code and email address of developer, for example, 890: pmcdaniel@sbctc.edu
- Date pivot grid was created or updated
- Business process number, if applicable.

**Pivot Grid Definition**

There is no definition field for Pivot Grids. Use the description field provided to write a thorough description of the pivot grid as explained above in Pivot Grid Description.

**Pivot Grid Folder**

Pivot Grids are not stored in folders. The standard queries that make up the pivot grid are. Any standard query used in a pivot grid report will be stored in the Pivot Grid folder.

**Pivot Grid Data Sources**

Available pivot grid data sources are:

- Standard Queries
- Composite Queries
PS Queries for Pivot Grid

Queries used as data sources for Pivot Grids should have a PG designation at the beginning of the query name. PGXX_XX_XXXXX

- Example:
  - Query – PGFS_AR_ITEM_DST_GL

Queries used in Pivot Grids must be stored in the Pivot Grid folder.

Composite Queries for Pivot Grid

Composite query enables users to combine data from existing base queries and then apply filters, aggregates, and so on before presenting the report results, which show the combined data set. Composite query retrieves multiple levels of related information on existing base queries and presents the combined data as a single and flattened query result. The composite query is comprised of multiple base queries. They can be used as a data source for pivot grids. It is important to designate which queries make up part of a composite query and what their role is within the composite query. There is a 30 character limit on the composite query’s name.

Composite queries can be ‘broken down’ into two parts:

- Composite Query – hierarchical object created from multiple existing queries.
- Base Query - A query that is joined by field to other queries then tied together as a composite query that can be used as a data source for pivot grid.

Composite queries are found in the Composite Query Manager. A composite query is created by connecting multiple queries together. The composite query is designated by the prefix COXX where XX is the pillar name. The base queries are designated by the suffix COX where X is the base query number. The descriptive portion of the names for the final composite query and the base queries should be the same for continuity.

- Example:
  - Composite Query: COHC_PY_COMPOSITE_EXAMPLE
  - Base Queries: PGHC_PY_COMPOSITE_EXAMPLE_CO1
  - PGHC_PY_COMPOSITE_EXAMPLE_CO2
  - PGHC_PY_COMPOSITE_EXAMPLE_CO3

- Note that all queries share the same base name.

Composite Query for Pivot Grid Naming Convention

COXX_XX_XXXXXX – where CO stands for Composite Query

- Example: COCS_PY_COMPOSITE_EXAMPLE

Composite Query Description Properties:

Enter a brief description of the composite query.

- Example: “Payroll Register Report”

Composite Query Definition Properties:

Composite queries do not have the standard Definition field found in Query Manager. Base queries are listed in the body of the composite query manager page and do not have to be further defined.
Composite Query Base Queries

Base queries are standard queries found within Query Manager. It is important to designate them appropriately, so they do not get used or modified incorrectly.

Composite Base Query Naming Convention

BIXX_XX_XXX......XXXX_CO1 - where CO1 stands for Composite Base Query 1
BIXX_XX_XXX......XXXX_CO2 - where CO2 stands for Composite Base Query 2
BIXX_XX_XXX......XXXX_CO3 - where CO3 stands for Composite Base Query 3

• Example: 
  BIHC_PY_COMPOSITE_BASE_CO1
  BIHC_PY_COMPOSITE_BASE_CO2
  BIHC_PY_COMPOSITE_BASE_CO3

Queries used in Pivot Grids must be stored in the Pivot Grid folder.

Composite Base Query Description Properties:
Enter a brief description of the query.

• Example: “Payroll Register Report”

Composite Base Query Definition Properties:
Enter additional details regarding the Base Query including the name of the Composite Query.

• Example: 890:lpeterson@sbctc.edu 10/04/2017
  Composite Base Query.
  Composite Query: COCS_PY_COMPOSITE_EXAMPLE

Note: Only Advanced Query Developers who become Report Developers by completing the required training will have access to BI Publisher in PCD. Please see Query Developer Levels and Access to Reporting Tools in PCD for more information.

nVision Conventions and Protocol

PS/nVision is a sophisticated tool for creating business reports in Microsoft Excel. Working within Microsoft Excel, user can create a report layout that defines both the data to retrieve and the format of the report. Using PS/nVision, users can create report layouts that summarize information from the PeopleSoft database and use the drill down feature to expose the supporting details. Users can share report layouts across multiple business units and time periods, creating reports that "roll" from unit to unit or period to period without changing the data-retrieval criteria.

PS/nVision works within spreadsheets. Access PS/nVision features from a special PS/nVision menu within Microsoft Excel to create templates (layouts) for data retrieval. Once a report layout is created (XNV file), users can use it to automatically format data. PS/nVision selects data from the PeopleSoft database using ledgers, trees, and queries.

nVision Naming Convention

The naming convention for nVision reports created by Data Services is: N_XXXXXXXX
Note: Only State Board staff will have access to create nVision reports.

**NVision Description**
Enter a brief description of the report in the Title field of Define Report Request

**NVision Definition**
nVision reports do not have a definition field. Enter as much information as possible in the query definition if using a query as a data source.

**NVision Folder**
NVision reports are not stored in folders. Any standard query used in a NVision report will be stored in the NVision folder.

**nVision Data Sources**
nVision data sources subject to naming conventions are:

- Standard Queries

**PS Queries for nVision**
Queries used as data sources for nVision should have a NV designation at the beginning of the query or connected query name. NVXX_XX_XXXX

- Example:
  - Query – NVFS_AR_ITEM_DST/GL

Queries used in nVision must be stored in the nVision folder.

**Additional Information**
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**

DELCERED 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.

**Query Maintenance**

The SBCTC Data Services team will annually work on query clean up during the month of August. Queries which have not been ran in one year will be moved to the ARCHIVE folder. Queries which have resided in the ARCHIVE folder for one year and were still not ran (totaling 2 years without being used) will be deleted.