



CHARTER SCHOOL PEOPLESOFT TRAINING MANUAL

Palm Beach County School District—HRIM Team

How to Run Queries

DIVISION OF HUMAN RESOURCES

Compensation and Employee Information Services

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How to Run a Query

In PeopleSoft, users have the ability to extract information using the Query Tool. The data can display in an HTML or Excel format. Running queries to Excel provides the flexibility of sorting, adding formulas, printing with different parameters, changing format and emailing the results like any other Excel spreadsheet.

One of the most frequently run queries, is **CHT_CAE_STAFF_LISTING_BY_DEPT**. This query reflects all staff currently listed in PeopleSoft for your school. It should be run several times a year to ensure that all staff has been correctly entered in PeopleSoft and that staff no longer working at your school have been terminated correctly in PeopleSoft.

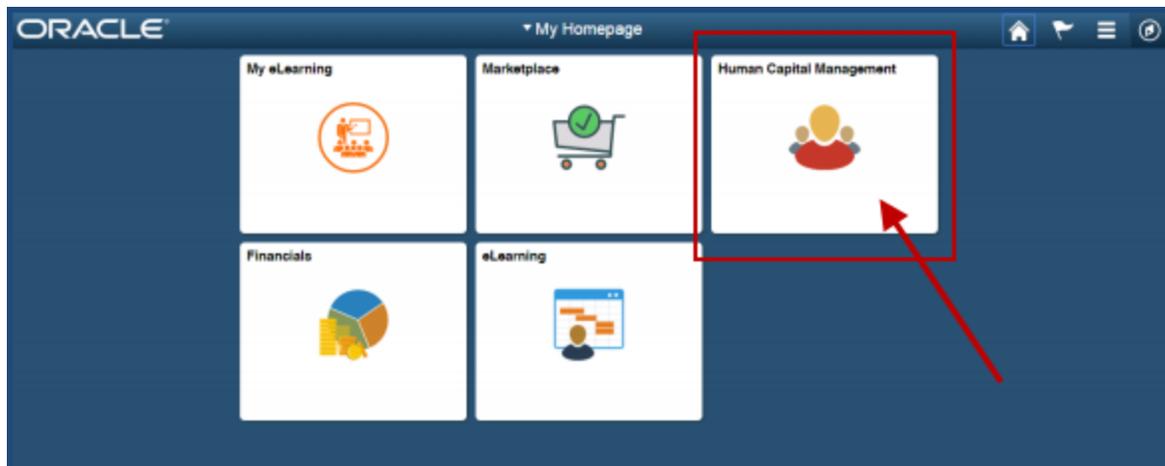
Recommended times to run this query:

- At the beginning of a school year
- Prior to the Charter DOE Staff Survey 2 period in October
- Prior to the break in December
- Prior to the Charter DOE Staff Survey 3 period in February
- At the end of a school BEFORE terminating staff members in PeopleSoft who will not be returning for the next school year
- Prior to the Charter DOE Staff Survey 5 period in July

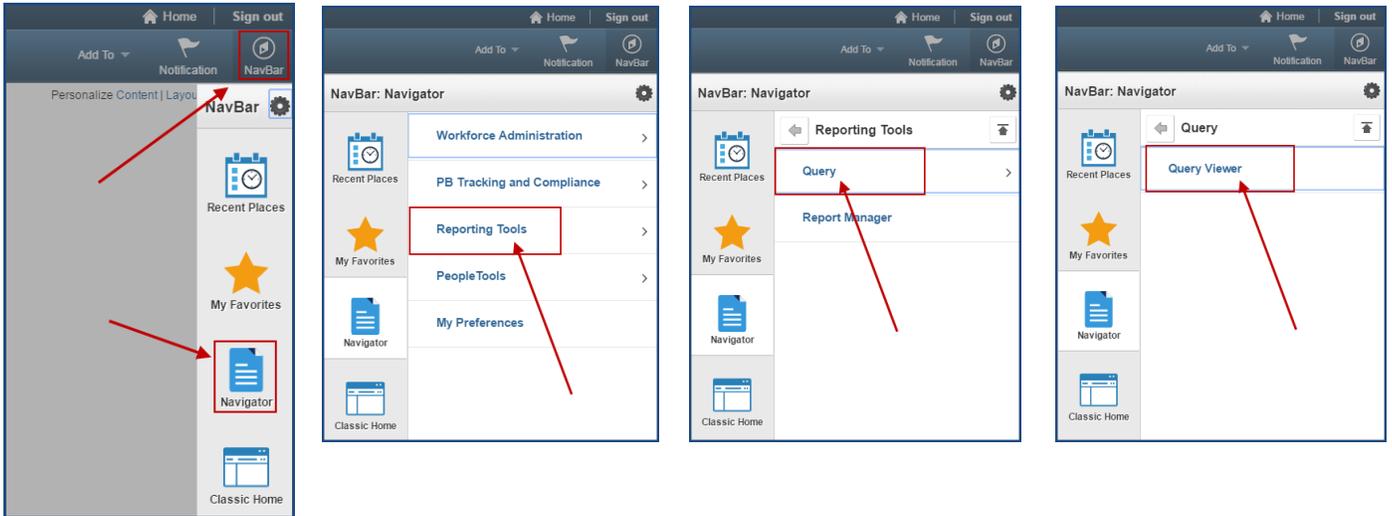
To run a query, you will need to navigate to **Query Viewer** in *PeopleSoft*.

It is a good idea to create a folder on your computer for the Staff Lists each fiscal year. When you run the query to an Excel format, you can name the file "Staff Listing as of " and include the date in the following format, for example: 060118 (06=month; 01=day; 18=year).

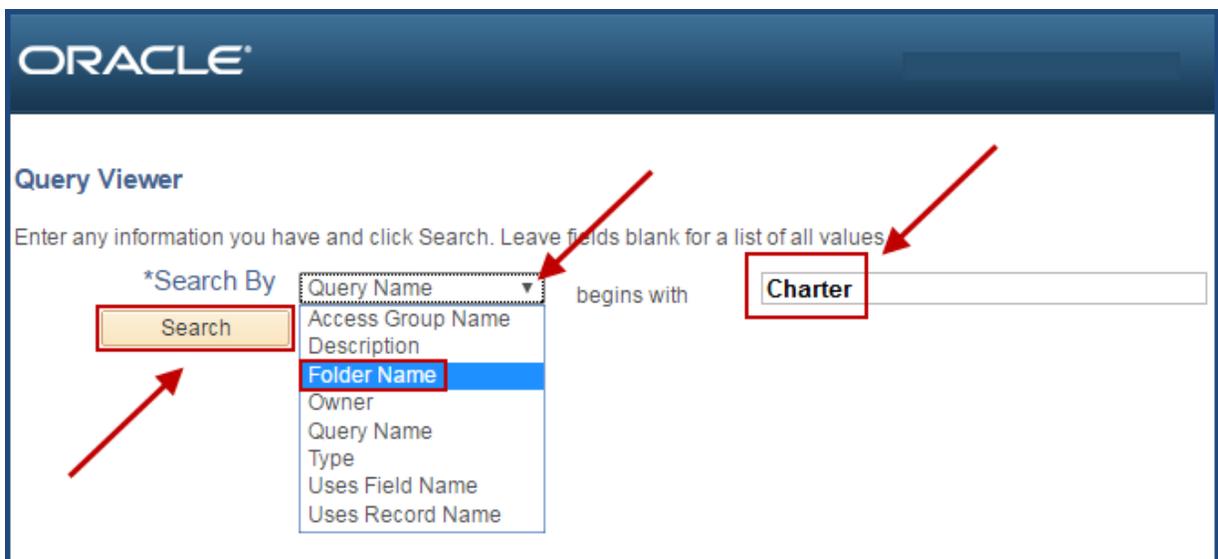
1. Once you are logged into *PeopleSoft*, click on the **Human Capital Management** tile on **My Homepage**.



2. A new window will open. Click on the **NavBar** icon in the upper right of the window to display the **NavBar Menu**, then click on the **Navigator** icon.
3. Click on **Reporting Tools**, then **Query**, then **Query Viewer**.



4. Once the **Query Viewer** window appears, click on the dropdown arrow in the **Search By** field and choose **Folder Name**. Type *Charter* in the **begins with** field. Click **Search**.



- The list of Queries available to Charter Schools will appear. Look for the **CHT_CAE_STAFF_LISTING_BY_DEPT** query. Click on *Excel* to run the query results to an *Excel* file.

It is a good idea to click the Favorite button next to any Queries you may run frequently. The next time you navigate to the Charter Query folder, they will already be listed.

Query Viewer

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

*Search By Folder Name begins with CHARTER

Search Advanced Search

Search Results

*Folder View -- All Folders --

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
CHT_A_BENEFIT_RCD	Audit of CHT Benefit Record	Public	CHARTER CAE	HTML	Excel	XML	Schedule	Lookup References	Favorite
CHT_A_DD_FTE_HR_ISSUES	Charter duty day fte hrs issue	Public	CHARTER CAE	HTML	Excel	XML	Schedule	Lookup References	Favorite
CHT_A_FTE_GREATER_THAN_1	Selects CHTEEs with FTE > 1.00	Public	CHARTER CAE	HTML	Excel	XML	Schedule	Lookup References	Favorite
CHT_A_LOA_PRIMARY	CHT Leave record is primary	Public	CHARTER CAE	HTML	Excel	XML	Schedule	Lookup References	Favorite
CHT_A_MULTI_ACTIVE_PRIMARY_RCD	Multi active CHT Primary Rrd	Public	CHARTER CAE	HTML	Excel	XML	Schedule	Lookup References	Favorite
CHT_A_NO_ACTIVE_PRIMARY_RECORD	No active CHT Primary Record	Public	CHARTER CAE	HTML	Excel	XML	Schedule	Lookup References	Favorite
CHT_A_NO_ETHNICITY	EEs with blank ethn or race	Public	CHARTER CAE	HTML	Excel	XML	Schedule	Lookup References	Favorite
CHT_A_NO_ETHNICITY_SEX_EDU_BD	EEs with unknown race, sex, ed	Public	CHARTER CAE	HTML	Excel	XML	Schedule	Lookup References	Favorite
CHT_A_NO_HOME_ADDRESS	EEs with no home address	Public	CHARTER CAE	HTML	Excel	XML	Schedule	Lookup References	Favorite
CHT_A_NO_SALARY	Charter no annual rt	Public	CHARTER CAE	HTML	Excel	XML	Schedule	Lookup References	Favorite
CHT_A_POSITION_NUM	Audit CHT CAE with position	Public	CHARTER CAE	HTML	Excel	XML	Schedule	Lookup References	Favorite
CHT_A_SURVEY		Public	CHARTER CAE	HTML	Excel	XML	Schedule	Lookup References	Favorite
CHT_CAE_BIRTHDAY_LIST	Employee Birthday List	Public	CHARTER CAE	HTML	Excel	XML	Schedule	Lookup References	Favorite
CHT_CAE_EMPLOYEE_MAILING_LABEL	Employees Mailing Labels	Public	CHARTER CAE	HTML	Excel	XML	Schedule	Lookup References	Favorite
CHT_CAE_EMPLOYEE_SHEET	Employee names, signature line	Public	CHARTER CAE	HTML	Excel	XML	Schedule	Lookup References	Favorite
CHT_CAE_STAFF_LISTING	Personnel by dept	Public	CHARTER CAE	HTML	Excel	XML	Schedule	Lookup References	Favorite
CHT_CAE_STAFF_LISTING_BY_DEPT	Personnel by dept	Public	CHARTER CAE	HTML	Excel	XML	Schedule	Lookup References	Favorite

Note: A yellow callout bubble says "Do not use this one" pointing to the "CHT_CAE_STAFF_LISTING" row. Red arrows point from the "Excel" and "Favorite" buttons of the "CHT_CAE_STAFF_LISTING_BY_DEPT" row to the corresponding buttons in the next screenshot.

- In the next window, enter your school number and click **View Results**. (Depending upon the browser used, you may be prompted to choose whether to **Open** or to **Save** the file. If prompted, choose **Open**.)

CHT_CAE_STAFF_LISTING_BY_DEPT - Personnel by dept

DEPT ID:  **Enter school number**

View Results

ID	Empl Record	NID	Last	First Name	Job Code	Job Title	Dept	School Name	Pay Status
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- Once the file opens, save the file to your computer. You can use the following example as the file name: *Staff Listing as of 060118* (06=month; 01=day; 18=year) and keep a file for each fiscal year.