



PEOPLESOFT QUERY: UPGRADE TO VERSION 8

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Agenda

- **To provide an introduction to PeopleSoft Query Manager, Version 8, by demonstrating how to run a pre-defined query**
- **Provide an update on the status of queries, both public and private, as they now exist in Version 7**
- **Promote the use of Brio Query using the Reporting Data Store (RDS) by demonstrating how to run a pre-defined query**
- **Open discussion and/or questions about upcoming upgrade**

RUNNING A PS QUERY FROM QUERY MANAGER IN VERSION 8

To get to the login page of PeopleSoft, Version 8, you will open Internet Explorer and navigate to the link.



Upgrade of Existing PeopleSoft Queries

- Database was copied in November 2003
- Queries, both private and public, which existed at that time were evaluated by the PeopleSoft Upgrade Lab

- The upgrade document identified changes to each query. Those changes included:
 - Deletion of records (tables)
 - Deletion of fields
 - Field Name Changes
 - Index Changes
- One query could have one or more changes

- Organized this information into an Access database to provide an efficient way to analyze all the queries; 2,300 unique queries affected
- Public queries already being updated and re-run in Version 8;
- Private queries sorted by operator ID and will be distributed via an Excel spreadsheet for the query creator to review
- Need to determine if they are still being used; if so, make public so the query can be upgraded.

- There was also a supplemental list produced that included all of the PS Queries written since November (when the database was copied for the Upgrade Lab)
- This list was divided into public queries and private queries. These private queries were appended to the original list and they will be circulated as well. There were 1,800 queries written since November.

- Keep in mind the following when reviewing this list of private queries:
 - Because of the sheer volume, make certain you really need them;
 - Take the time to determine if there is a Brio Query already written to extract the same data; Brio Query is the preferred tool to use since it uses the Reporting Data Store (RDS) and not the production system.

- The list will be circulated within the next week and be due back by July 1st. If I don't receive any input about particular queries, they won't be updated or in the case of those queries created since November, reviewed to see if they will work in Version 8. This allows several months to update all private queries.

RUNNING A BRIO QUERY USING THE REPORTING DATA STORE (RDS)

To get to the login page of Brio's On Demand Server, you will open Internet Explorer and navigate to the link.



- What can you do now in anticipation of the upgrade?
 - Listen to the PeopleSoft v8 Upgrade Overview available on the PeopleSoft Training site.
<http://www.uakron.edu/its/peoplesoft8/peoplesoft.php>
 - Become familiar with Internet Explorer. Take the training offered if review is needed.
 - Take the Brio Training.

- The simulated queries used today are available for review at the following location:
- <http://www.uakron.edu/its/>
- This is the home page of Information Technology Services. You will be guided from this page to the location of the Brown Bag notes and simulated queries.

- “GO LIVE” anticipated dates:
 - Portal – End of June, Beginning of July
 - Financials – September
 - Student Administration / HR – October
- Training for each module will begin approximately 2 weeks prior.

■ Questions?