



SUMMIT UPGRADE PROJECT

**Manager Self Service Query Pages
DD-H-HR-216**

PeopleSoft Human Resources 8.9 Upgrade

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CHANGE LOG

Description	Version
Original Document	1.0
Redesigned base sub query to use "in list" criteria	1.1

IMPACTED OBJECTS

Impact Type (New, Modify, or Delete)	Object Type (Record, View, Page, Page PeopleCode, etc)	Object Name	PeopleCode Event/ Comments
Modify	Project	RC_H_ALL_QUERIES	
New	Query	RC_H_HR_MANAGERSELS ERVICE	
New	Portal Registry Structure	RC_H_HR_MANAGERSELS ERVICE	
New	View	RC_QRY_OPRID_VW	
Modify	Query Tree	RC_QUERY_TREE	

The view RC_QRY_OPRID_VW is included in the project RC_H_ALL_QUERIES and does not need to be documented in any other Detail Design Documents.

The Tree RC_QUERY_TREE is also included in the project RC_H_ALL_QUERIES, but it must be documented in the modification's Detail Design Document.

TECHNICAL DESCRIPTION

This document provides the framework and instructions to create Query Pages in PeopleTools 8.48. The idea for creating Query Pages came from <http://peoplesoftexperts.blogspot.com/2006/09/execute-query-from-lefthand-portal.html>.

The idea was expanded to dynamically grab the current user's OPRID and EMPLD so there would no Prompts for the user. This would allow the user to only see the information tied directly to the person logged in. Ramsey County also wanted to use the REPORTS_TO field to manage Query security. When Managers ran the Query, it would return information for people who reported directly to them and no one else.

To accomplish the first requirement (grab the current user's OPRID and EMPLID), the table PSQRYTRANS is used. When a query is run, a row is inserted into PSQRYTRANS that contains the Query Name, the User ID and the Start Time. A new view was created to grab the OPRID and QRYNAME from the PSQRYTRANS table and return a single row based on the Query Name and the Start Time of the query.

Next, the OPRID is joined to the PSOPRDEFN table to grab the current user's EMPLID. Then, the EMPLID is joined with the view PS_EMPL_CURRJOB_VW to grab the current user's POSITION_NBR. Finally, the POSITION_NBR is joined to the view PS_EMPL_INFO_VW to return a list of EMPLIDs of users whose REPORTS_TO field matches the POSITION_NBR.

The query in this document is the starting point for all Manager Queries. Because this query returns just them EMPLID of direct reports, it can be expanded to grab any information that includes EMPLID.

ONLINE OBJECTS

Portal Registry Structure

Portal Registry Structure Definition		
Name: RC_H_HR_EMPLOYEEEREPORTS	Type (Folder or Content): Content	
Label: Employee Reports	Sequence: 999	Product:
Parent Folder: Manager Self Service	Object Owner ID:	
Long Description: A list of Employee's IDs who report directly to you.		
URL Type: PeopleSoft Generic URL	Portal URL: q/?ICAction=ICQryNameURL=PUBLIC.RC_H_HR_EMPLOYEEEREPORTS	
Permission Lists: PTPT1000		

Records

Record: RC_QRY_OPRID_VW					Record Type: View			
Field Name	Key	Dir	Req	Src Key	Alt Src	List Box	Default Value	Table Edits
OPRID								

RC_QRY_OPRID_VW.SQL

```
SELECT %FirstRows(1) USERID
, QRYNAME
FROM PSQRYTRANS
ORDER BY QRYSTARTTIME
```

Query

Query Name: RC_H_HR_MANAGERSELSERVICE		Description: Starter Query for MSS					
Query Type: User		Owner: Public					
Records							
NAMES					A		
Fields							
Col	Record, Fieldname	Format	Order By Num	Agg	Heading Text		
1	A.NAME	Char50			Name		
Criteria							

Logical	Expression 1	Condition Type	Expression 2
	A.EFFDT	Last Eff Date	B.EMPLID
AND	A.EMPLID	Equal to	Subquery 1
SQL			
<pre> SELECT A.NAME FROM PS_NAMES A, PS_PERS_SRCH_QRY A1 WHERE A.EMPLID = A1.EMPLID AND A1.OPRID = 'DANIEL.IVERSON' AND (A.EFFDT = (SELECT MAX(A_ED.EFFDT) FROM PS_NAMES A_ED WHERE A.EMPLID = A_ED.EMPLID AND A.NAME_TYPE = A_ED.NAME_TYPE) AND A.EMPLID IN (SELECT B.EMPLID FROM PS_EMPL_INFO_VW B, PS_EMPL_CURRJOB_VW C, PS_EMPL_INFO_VW D WHERE B.EMPLID = C.EMPLID AND B.EMPL_RCD = C.EMPL_RCD AND C.REPORTS_TO = D.POSITION_NBR AND D.EMPLID = (SELECT E.EMPLID FROM PSOPRDEFN E WHERE E.OPRID = (SELECT F.OPRID FROM PS_RC_QRY_OPRID_VW F WHERE F.QRYNAME = 'RC_H_HR_MANAGERSELSERVICE'))))) </pre>			

Query Name: Subquery 1		Description: Direct Reports EmplID Subquery			
Query Type: User		Owner: Public			
Records					
EMPL_INFO_VW		B			
EMPL_CURRJOB_VW		C			
EMPL_INFO_VW		D			
Fields					
Col	Record, Fieldname	Format	Order By Num	Agg	Heading Text
1	B.EMPLID	Char11			ID
Criteria					
Logical	Expression 1	Condition Type	Expression 2		
	B.EMPLID	Equal to	C.EMPLID		
AND	B.EMPL_RCD	Equal to	C.EMPL_RCD		
AND	C.REPORTS_TO	Equal to	D.POSITION_NBR		
AND	D.EMPLID	Equal to	Subquery 2		
SQL					
<pre> (SELECT B.EMPLID FROM PS_EMPL_INFO_VW B, PS_EMPL_CURRJOB_VW C, PS_EMPL_INFO_VW D WHERE B.EMPLID = C.EMPLID AND B.EMPL_RCD = C.EMPL_RCD AND C.REPORTS_TO = D.POSITION_NBR AND D.EMPLID = (SELECT E.EMPLID FROM PSOPRDEFN E WHERE E.OPRID = (SELECT F.OPRID FROM PS_RC_QRY_OPRID_VW F WHERE F.QRYNAME = 'RC_H_HR_MANAGERSELSERVICE')))) </pre>					

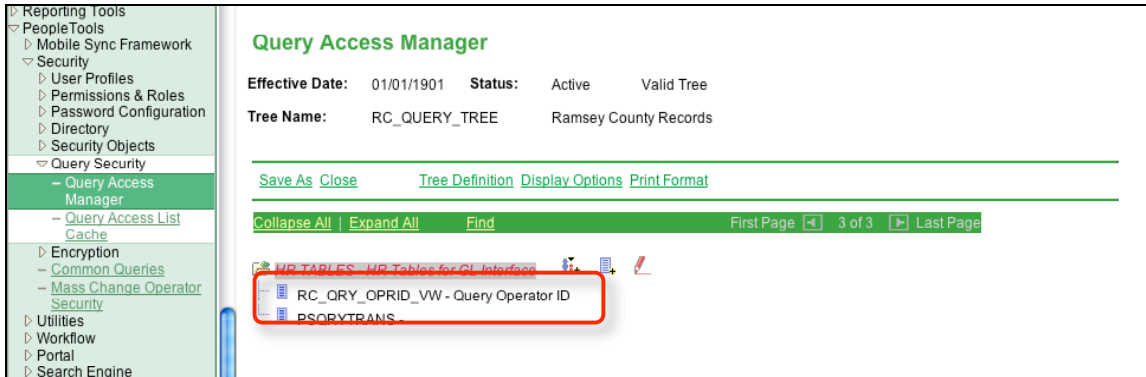
Query Name: Subquery 2		Description: Emplid Subquery			
Query Type:		Owner:			
Records					
PSOPRDEFN		E			
Fields					
Col	Record, Fieldname	Format	Order By Num	Agg	Heading Text
1	E.EMPLID	Char11			ID
Criteria					
Logical	Expression 1	Condition Type	Expression 2		
	E.OPRID	Equal to	Subquery 3		
SQL					
<pre>(SELECT E.EMPLID FROM PSOPRDEFN E WHERE E.OPRID = (SELECT F.OPRID FROM PS_RC_QRY_OPRID_VW F WHERE F.QRYNAME = 'RC_H_HR_MANAGERSELSERVICE'))</pre>					

Query Name: Subquery 3		Description: Current User Subquery			
Query Type: User		Owner: Public			
Records					
RC_QRY_OPRID_VW		F			
Fields					
Col	Record, Fieldname	Format	Order By Num	Agg	Heading Text
1	F.OPRID	Char11			ID
Criteria					
Logical	Expression 1	Condition Type	Expression 2		
	F.QRYNAME	Equal to	'RC_H_HR_MANAGERSELSERVICE'		
SQL					
<pre>(SELECT F.OPRID FROM PS_RC_QRY_OPRID_VW F WHERE F.QRYNAME = 'RC_H_HR_MANAGERSELSERVICE')</pre>					

Trees

The new view RC_QRY_OPRID_VW must be added to the Query Security Tree before it can be used. Navigate to 'PeopleTools > Security > Query Security > Query Access Manager'. Select the Tree RC_QUERY_TREE. Add the new view to the tree.

Tree Screenshot



App Designer Project

A single Application Designer project will be created to store the Queries and the Content References created. The project name is RC_H_ALL_QUERIES. The Queries and Content References must be inserted into the Application Designer project so they can be migrated to the Production environment.

PORTAL REGISTRY CONFIGURATION

Create the Content Reference

Navigate to ‘PeopleTools > Portal > Structure and Content’. Navigate to the folder under which you want to create the content reference. Add a new content reference and fill following fields as follows

- **Node Name** - Always use Local or appropriate remote node name
- **URL Type** - PeopleSoft Generic URL
- **Portal URL** - q/?ICAction=ICQryNameURL=PUBLIC.[YOUR_QUERY_NAME]

General
Security

[Root > Manager Self Service >](#)

Content Ref Administration

Name: RC_H_HR_MANAGERSELSERVICE

***Label:** [Copy object](#) [Select New Parent Folder](#)

Long Description: (254 Characters)

Product:

Sequence number:

Object Owner ID

Usage Type:

Storage Type:

Template Name:

Author: DANIEL.IVERSON

Parent Folder: Manager Self Service

***Valid from date:**

Valid to date:

Creation Date: 12/04/2006

WSRP Producible

No Template

[Create Content Reference Link](#) [Add Content Reference](#) [Test Content Reference](#)

URL Information

Node Name

URL Type:

***Portal URL:**

Hide from portal navigation Hide from MSF navigation

Content Reference Attributes

Name: [Delete](#)

Label: Translate [Attribute Information](#)

Attribute value:

[Add](#)

Go to Security Tab and add appropriate permission list and save the content reference.

General Security

[Root](#) > [Manager Self Service](#) >

Content Reference Security

Label: Manager Self Service Reports

Public
 Author Access

Security Authorizations			
Type	Name	Description	View Definition
1	Permission List	PTPT1000	PeopleSoft User

Inherited Security Authorizations			
Type	Name	Description	View Definition
			View Definition

Run the Query

Navigate to the new query page ‘Manager Self Service > Manager Self Service Reports’.

Menu

- My Favorites
- Self Service
 - Manager Self Service
 - Time Management
 - Job and Personal Information
 - Compensation and Stock
 - Learning and Development
 - Performance Management
 - Manager Self Service Reports
 - Current Salary Info
 - Employee Reports
- Recruiting
- Workforce Administration
- Benefits
- Compensation
- Stock
- Time and Labor
- Payroll for North America
- Global Payroll & Absence Mgmt
- Payroll Interface

class='PSQRYTITLE' >RC_H_HR_MANAGERSELSERVICE- Starter Query for MSS

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) (1 kb)

View All First 1-3 of 3 Last

	Name
1	Gower, Steven
2	Bottoms, Lisa
3	Staunton, Joanne

This query shows the Manager’s direct reports.