



PeopleSoft Data Warehouse (EPM)

Sorting Fields for the Report:

Having a report that is sorted correctly is key to the overall readability and usage. As mentioned in the “Selecting Fields...” document, all fields listed under the **Print** icon will appear on the report (left-to-right in the order they are listed). In addition, fields listed under the **By** and **Across** icons will also appear on the report. However, these will either vertically (By) or horizontally (Across) sort the report by that field and produce row labels on the report. **By** fields will always appear first on the report.

The screenshot shows the 'Query' configuration window. It has three main sections: 'Print', 'By', and 'Across'. The 'Print' section contains 'LastName', 'FirstName', 'Middle Name', and 'Suffix'. The 'By' section contains 'Subject', 'Ctlg Nbr', and 'Section'. The 'Across' section is empty. Callouts explain that 'By' fields are sorted as rows going down, and 'Across' fields are sorted across columns and are typically used for calculations.

The setup and result of a basic report sorted using **By** fields may look like this:

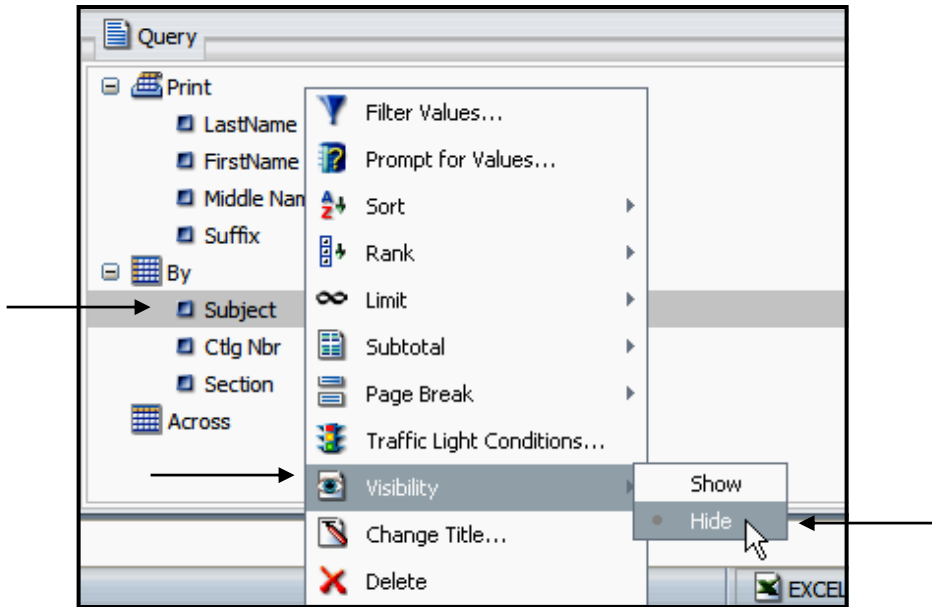
The screenshot shows the EPM Query configuration on the left and the resulting report output on the right. The configuration window has filters for 'Term Equal to 1108' and 'LastName Equal to Smith'. The 'By' section is circled in red. The report output is a table with columns A through H. The first three columns (A, B, C) are circled in red and labeled as 'By' fields. The table shows rows for various subjects, categories, and sections, with names listed in columns D, E, F, and G. Callouts explain that the 'By' fields are the first three listed and are sorted top to bottom, and that not all lines are populated because the 'By' fields produce row labels.

	A	B	C	D	E	F	G	H
	Subject	Ctlg Nbr	Section	lastName	FirstName	Middle Name	Suffix	
2	ACCT	201	002	Smith	Keye	Trainer	-	
3		201H	201	Smith	Sam	Weather	-	
4		308	350	Smith				
5				Smith				
6			352	Smith				
7				Smith				
8		309	010	Smith	Scott	Michael	-	
9			020	Smith	Sam	Linne	-	
10			112	Smith	Scott	Michael	-	
11			113	Smith	Scott	Michael	-	
12		313	001	Smith	Robert	Allen	-	
13			002	Smith	Tom	Andrew	-	
14			003	Smith	Tom	Andrew	-	
15		404	001					
16		412	250					
17			251					
18	ADVT	333	150					

EPM Query Instructions – Sorting

To make the resulting report easier to manipulate in the form of an Excel Spreadsheet, you may want to consider making the following alterations to your basic report. The following changes will allow every line in the report to be populated:

1. Switch the fields under **By** to the **Hide** setting which will remove the row label from the report. To do this, select the fields one at a time and right click, scroll over **Visibility**, and choose **Hide**.



2. From the table's field listing, add these same fields to the top of the **Print** list.

The screenshot shows the 'Query' window with the 'Print' list containing 'Subject', 'Ctlg Nbr', 'Section', 'LastName', 'FirstName', 'Middle Name', and 'Suffix'. The first three fields are circled in red. A callout box says 'The Query needs to look like this:'. An arrow points to an Excel spreadsheet showing the resulting report. The spreadsheet has columns A through H. Row 1 contains the headers: Subject, Ctlg Nbr, Section, LastName, FirstName, Middle Name, Suffix. Rows 2 through 18 contain data. A callout box points to the data rows, saying 'Now every line is populated, but the sort order remains the same.'

	A	B	C	D	E	F	G	H
1	Subject	Ctlg Nbr	Section	LastName	FirstName	Middle Name	Suffix	
2	ACCT	201	002	Smith	Keye	Trainer	-	
3	ACCT	201H	201	Smith	Su	Smith	-	
4	ACCT	308	350	Smith	Sel	Smith	-	
5	ACCT	308	350	Smith	Sel	Smith	-	
6	ACCT	308	352	Smith	Smith	Smith	-	
7	ACCT	308	35	Smith	Smith	Smith	-	
8	ACCT	309	01	Smith	Smith	Smith	-	
9	ACCT	309	02	Smith	Smith	Smith	-	
10	ACCT	309	11	Smith	Smith	Smith	-	
11	ACCT	309	113	Smith	Smith	Smith	-	
12	ACCT	313	001	Smith	Smith	Smith	-	
13	ACCT	313	002	Smith	Smith	Smith	-	
14	ACCT	313	003	Smith	Smith	Smith	-	
15	ACCT	404	001	Smith	Smith	Smith	-	
16	ACCT	412	250	Smith	Smith	Smith	-	
17	ACCT	412	251	Smith	Smith	Smith	-	
18	ADVT	333	150	Smith	Smith	Smith	-	