



### Using Excel with PeopleSoft

Previously we had two demonstrations on “Excel Worksheet Basics” and “Using Excel as a Database” to help you prepare for the upcoming PeopleSoft System. We will explore how Excel relates to PeopleSoft. There are two file formats that can be used to download data (Excel Spreadsheet and CSV Text file). We will go through the portal in PeopleSoft to run a query in the Query Manager for the Student Administration Module. This will create a data file that can be used in Excel. A few terms were mentioned that you may or may not be familiar with — portal, query, Query Manager, and CSV Text file format, let’s define them.

A **portal** is basically the entrance that will allow students, staff, and faculty self service access to various "role related" information to view or manipulate in PeopleSoft.

A **query** is a means of retrieving, viewing, and analyzing data from a database. The **Query Manager** is a tool in PeopleSoft that you will use to run the queries. Keep in mind that these queries have been written by the developers for you to use and not necessarily everyone will have access to the Query Manager.

A **CSV** (Comma Separated Variables) Text file is a comma delimited file which is a database exported into a format where each field is indicated by a comma. Where necessary (e.g., if the field has a comma in it) the field will also be quoted. This file type is often associated with Microsoft Excel as this is one of the standard ways to transfer data into and out of a spreadsheet.

# ConnectND Portal

**Who am I?**  
You are currently signed in as msaucedo

**Enterprise Menu**

- ▶ My Favorites
- ▶ Campus Websites
- ▶ Build Community
- ▶ Design Student Administration
- ▼ PeopleTools - Student Admin
  - [Query Manager](#)
- ▶ PeopleTools
  - [Forgot My Password](#)
  - [Search/Match](#)
  - [My Personalizations](#)
  - [My System Profile](#)

**Signon**

User Id:

Password:

[Sign In](#)

[Select Language](#)

**Welcome to CampusConnection**

**Welcome to CampusConnection**

The CampusConnection portal will provide a secure and convenient access to your personal and campus information. It isn't all here yet, but great features will continue to be added in coming months. Once you create a Userid and Password, you can return anytime to continue work on your application, check your application status, or update your bio/demo information.

Two pilot campuses have begun use of the new portal - Valley City State University and Mayville State University. If you would like to request information from or apply online to either of these institutions, follow the simple instructions provided below. Enjoy the new real-time access to your campus information.

**First Time Users**

**Request Information**

1. Click on **Request Information**
2. Complete and submit **User Registration**
3. **Create a User Profile** and select a Userid and Password
4. Continue onto **Campus Access** and **Request Information**.

**Apply for Admission**

1. Click on **Apply for Admission**
2. Complete and submit **User Registration**
3. **Create a User Profile** and select a Userid and Password
4. Continue onto **Campus Access** and **Apply for Admission**.

**Have Userid and Password**

1. Enter Userid and Password in **Signon Box**
2. Click **Sign In**

powered by **PeopleSoft**

**Select** from the Enterprise Menu:  
People Tools-Student Admin, Query  
Manager

**Enterprise Menu**

- ▶ My Favorites
- ▶ Campus Websites
- ▶ Build Community
- ▶ Design Student Administration
- ▼ PeopleTools - Student Admin
  - [Query Manager](#)
- ▶ PeopleTools
  - [Forgot My Password](#)
  - [Search/Match](#)
  - [My Personalizations](#)
  - [My System Profile](#)

The Query Manager screen will come up for you to search for an existing Query.

## Query Manager

### Find an Existing Query

Search by:

\*Query Type:

[Search](#)

A list of queries is listed. The Class Description query is selected by clicking on the Run hyperlink.

Query	View All	First	1-30 of 300	Last
SF301__TEST_ITEM_TYPE_TABLE	SF301---Test Item Type Table	Public	<a href="#">Run</a>	
SF302__TEST_GL_INTERFACE_TBL	SF302---Test GL Interface Tbl	Public	<a href="#">Run</a>	
SF701__TERM_FEES_TABLES	SF701 - Term Fees Tables	Public	<a href="#">Run</a>	
SF702__TERM_SUBFEES_TABLE	SF702 - Term Subfees Table	Public	<a href="#">Run</a>	
SF703A__CLASS_SUBFEE_TABLE	SF703A - Class SubFee Table	Public	<a href="#">Run</a>	
SF703B__CLASS_TBL		Public	<a href="#">Run</a>	
SF703__CLASS_FEES_TABLE	SF703 - Class Fees Table	Public	<a href="#">Run</a>	
SF704A__COURSE_SUBFEES_TABLE	SF704 - Course Subfees Table	Public	<a href="#">Run</a>	
SF704B__CRSE_OFFER		Public	<a href="#">Run</a>	
SF704__COURSE_FEES_TABLE	SF704 - Course Fees Table	Public	<a href="#">Run</a>	
SF705__COURSE_RATES_TABLE	SF705 - Course Rates Table	Public	<a href="#">Run</a>	
SF706A__ITEM_TYPE_TBL_QUERY	SF706A - ITEM TYPE TBL QUERY	Public	<a href="#">Run</a>	
SF707__GROUP_SUMMARY_REPORT	SF707 - Group Summary Report	Public	<a href="#">Run</a>	
SF708__CALC_ERRORS_REPORT	SF708 - Calc Errors Report	Public	<a href="#">Run</a>	
SF709A__CLASS_DESCRIPTION	SF709A--Class Description	Public	<a href="#">Run</a>	

Notice the screen view and data after running the query. The top of the screen has the title of the query followed by “Download results in: Excel Spreadsheet CSV Text File” and the data.

SF709A\_\_CLASS\_DESCRIPTION- SF709A--Class Description

Download results in: [Excel SpreadSheet](#) [CSV Text File \(17 kb\)](#)

[View All](#) First 1 - 100 of 211 Last

	Class Nbr	Description	Term
1	1984	Pre-School Management	0410
2	1673	General Biology I Lab	0410
3	1677	Invertebrate Zoology Lab	0410

**File Download**

Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open or save this file.

File name: ND5T80  
 File type: Microsoft Excel Worksheet  
 From: tst-web-0.ndusdom.erp.nodak.edu

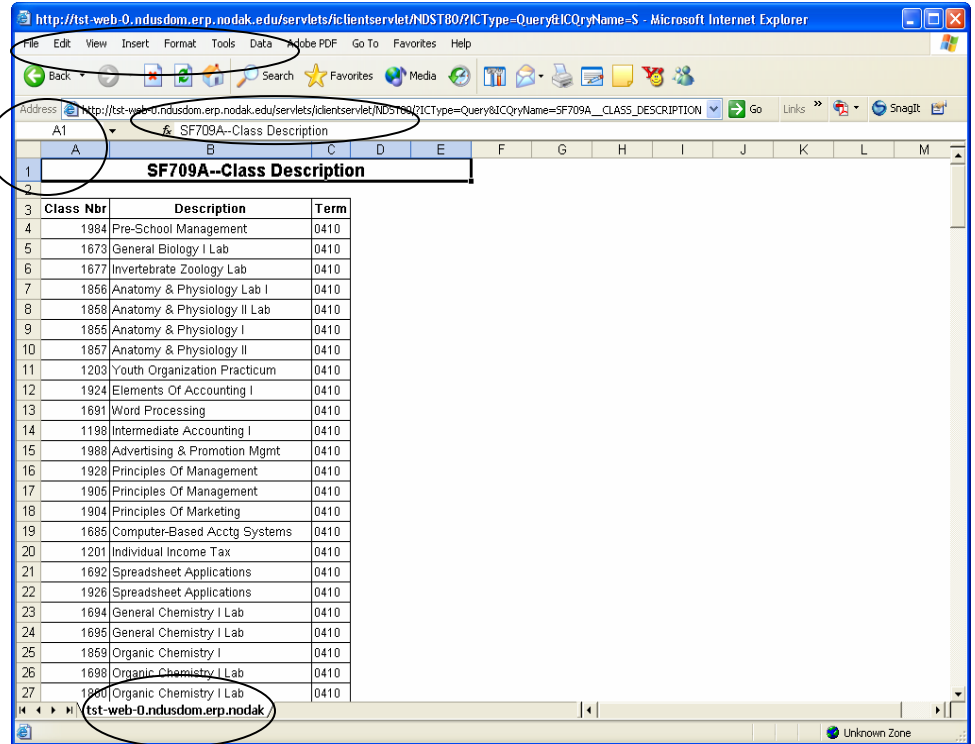
**Warning** This type of file could harm your computer if it contains malicious code.

Would you like to open the file or save it to your computer?

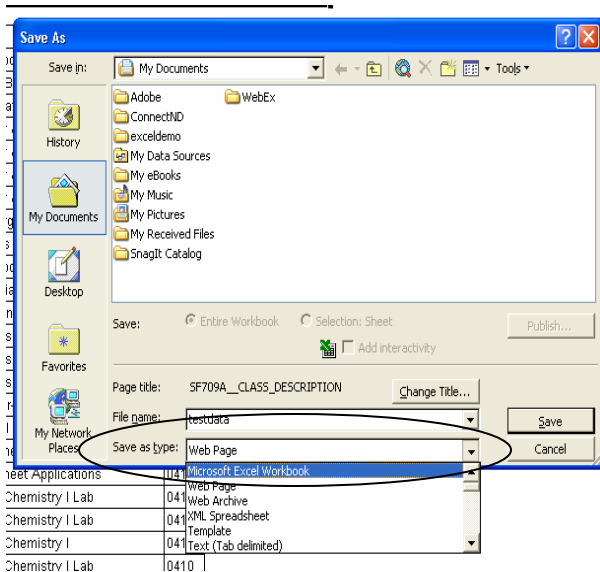
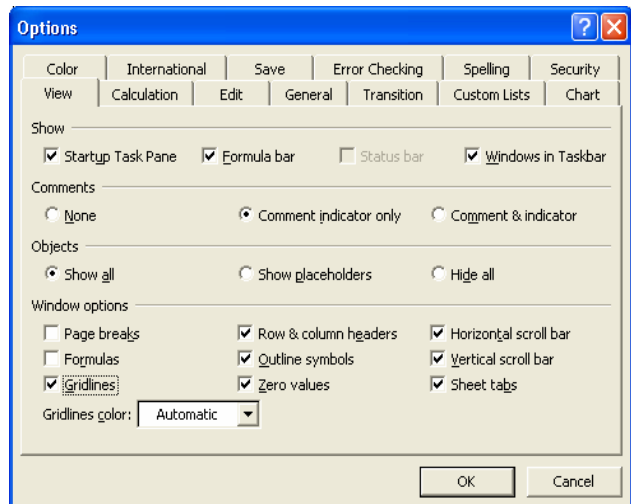
Always ask before opening this type of file

At this point you have several options, view the data in PeopleSoft or download the data using the Excel Spreadsheet or CSV Text file. If you click on the Excel Spreadsheet link, the File Download dialog box will appear. Select Open to view the file.

Notice the file opened in the browser not in the Excel application but if you look at the screen closely, you can see some familiarity to Excel such as the Menu Bar, Name Box, Formula bar, Rows, Columns, and Sheet Tabs.



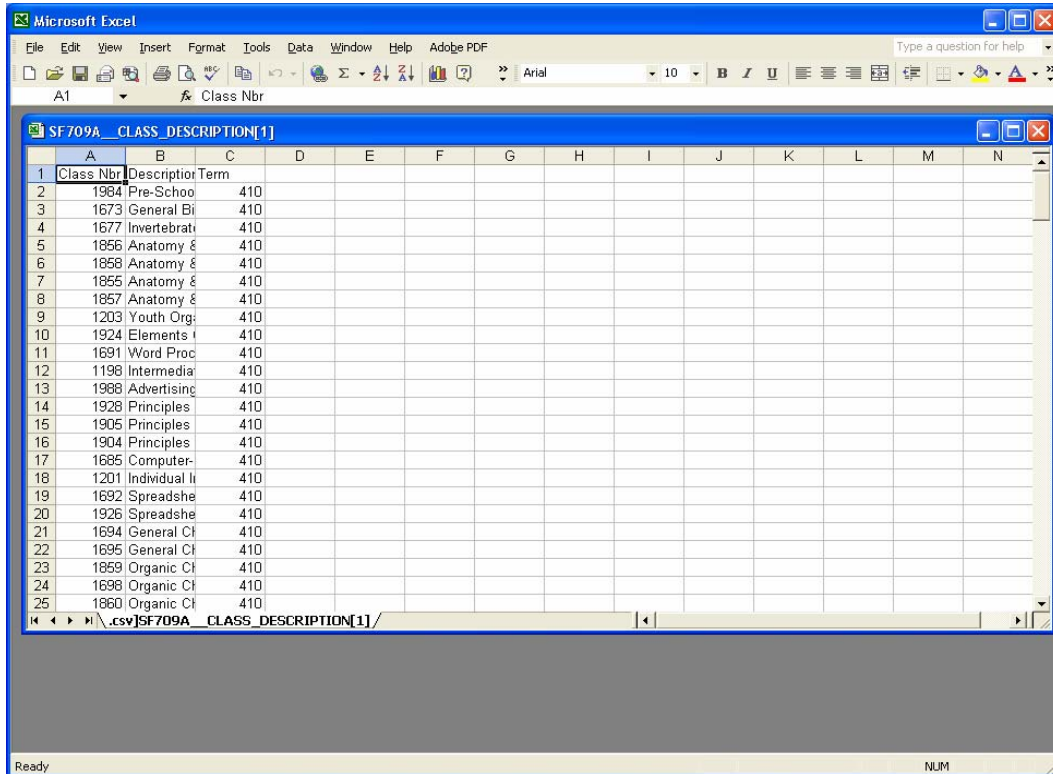
You can work in this view to make any changes to the spreadsheet just as if you were using the Excel application. For example, if you are used to seeing the gridlines in your spreadsheets, go to Tools, Options, View and check Gridlines.



You can also rename this particular worksheet to "Class Description" by either double clicking on sheet tab then typing in the new name or by right clicking on the tab to get a menu and select rename.

To save this spreadsheet Click File, Save As, make sure you change the file type to Microsoft Excel otherwise it will save it as an html document.

If you select the CSV Text File, you will also get the File Download Dialog box. Click open and notice your screen. You are in the Excel application so you can make any changes that you like to it. For example, you can use AutoFit to increase columns width, format the column labels, and rename the worksheet.



When you save make sure you change the file type to Microsoft Excel.

