



PEOPLESOFT REPORTS – QUICK GUIDE

ADDITIONAL REPORTS - STATE DATA QUERY

This report will provide you with all your members who have been uploaded to PeopleSoft to date for the current membership year.

Access People Soft using your state log-in.

Menu Path: Membership System> Reports > Additional Reports

This brings you to the Query Manager page.

Type: FFA_MEM_EXTRACT in the empty field.

Click SEARCH.

Locate: FFA_MEM_EXTRACT_STATE - click on the blue link “RUN”.

When the next screen comes up, enter the State Abbreviation and % (for example GA%) where it says enter chapter prefix.

Click: View Results (this takes a few minutes to download).

You may get a message saying file is too large, click ok.

*The results look like an Excel Spreadsheet

HOWEVER YOU ARE STILL IN MICROSOFT INTERNET EXPLORER.

Click on Download Results in Excel Spreadsheet.

On your toolbar go to File > Save as. Name the file and save on your desktop. Make sure that when you save the file the type is saved as: Microsoft Excel workbook.

Close Microsoft Internet Explorer window.

Open the file on your desktop; sort, send or view as desired.

This report will provide you with all your members who have been uploaded to the system, to date.

USING PIVOT TABLE ON DATA

To move this Excel Spreadsheet into a pivot table format, follow the instructions below.

Open the Excel file that you’ve just saved to your desktop. Delete the top two lines so that the top line in your spreadsheet has the column headers on it.

Highlight the whole page by clicking on the top left cell (the whole worksheet should be highlighted). Go to your toolbar at the top and click on Data, then Pivot Table.

At step one, use the pre-sets that come up and click on “Next”.

At step two, use the pre-set information again and click “Next”.

At step three, click on the Layout button at the bottom of the box.

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Pivot Table, page 2.

This will bring up a layout showing “Row” to the left side, “Column” at the top and “Data” in the middle. Click on the small box on the right labeled Chapter ID and drag and drop it to the section of the layout labeled Row. Then grab the small box labeled Student ID and drag and drop it to the section labeled Data. Then click OK.

This will return you to the step three screen, click Finish.

You will then be able to see the finished pivot table for your state. You can move the extra toolbar to the top of your screen next to your other toolbar so that you can see the screen better. Your excel spreadsheet list will be set up by chapter number with the current number of active members in that chapter listed to the right. If you double click on the number it will add a page to your spreadsheet and fill the page with all the student data for each person within that chapter.

Make sure that you save this pivot table copy or it will revert back to the original excel spreadsheet that you started with.

You can adjust your pivot table by changing the items you select when you work on the layout screen.