**General Steps to Pull Reports from PeopleSoft for MGMA Survey**

1. **Log in to PeopleSoft**:
   * Open your web browser and go to your organization’s PeopleSoft login page.
   * Enter your username and password to access the system.
2. **Navigate to the Reporting Tools**:
   * After logging in, head to the "Reporting Tools" section. This can typically be found under the "Reporting Tools" or "Queries" menu.
   * Look for tools such as Query Manager, Query Viewer, or nVision, which you’ll use to generate the necessary reports.
3. **Using Query Manager to Generate MGMA Survey Data**:
   * **Access Query Manager**: Navigate to Reporting Tools > Query > Query Manager.
   * **Create a New Query**:
     + Click on "Create New Query".
     + Select the appropriate record (table) you want to query. For example, you might need data from the HR, payroll, or financial tables to fill out the Compensation and Production or Cost and Revenue sections of the MGMA survey.
   * **Add Fields**:
     + Add the specific fields required for the MGMA survey by selecting them from the list of available fields in the chosen record. Common fields might include Employee ID, Job Title, Compensation, Hours Worked, etc.
   * **Add Criteria**:
     + Filter the data according to the MGMA survey requirements. For instance, you might filter by specific departments, job titles, or date ranges.
   * **Run the Query**:
     + Save and run the query to generate the report.
     + You can run the query directly in Query Manager or use Query Viewer to view and refine the results.
4. **Using Query Viewer for Final Data Review**:
   * **Access Query Viewer**: Go to Reporting Tools > Query > Query Viewer.
   * **Search for Your Query**: Enter the name of the query you created or search for existing queries that might already provide the data you need.
   * **Run the Query**: Click on the query name to run it and view the results. This step is crucial for ensuring that the data pulled matches the format and criteria specified by MGMA.
   * **Export Results**: Export the results to Excel or another format accepted by MGMA for easy uploading to the survey platform.
5. **Using PeopleSoft nVision for Detailed Financial Reports**:
   * **Access nVision**: Go to Reporting Tools > PS/nVision > Define Report Request.
   * **Create a New Report Request**: Follow the prompts to define a new report request, which may include financial data or other detailed reports required by the MGMA survey.
   * **Select Layout and Scope**: Choose the appropriate layout and scope based on the MGMA survey’s data requirements.
   * **Run the Report**: Submit the report request to generate the necessary data. This report can typically be exported and used directly for MGMA survey submission.

**Additional Resources and Support**

1. **MGMA Survey Participation Resources**: Refer to the MGMA survey participation page for specific guidelines on the data required. [MGMA Survey Participation Guide](https://www.mgma.com/mgma-datadive-survey-participation).
2. **PeopleSoft and Oracle Documentation**:
   * **Oracle PeopleSoft Documentation**: Access Oracle’s official PeopleSoft documentation online for comprehensive guides and user manuals. [Oracle PeopleSoft Documentation](https://docs.oracle.com/en/applications/peoplesoft/index.html).
   * **PeopleSoft Query Manager Guide**: Learn more about using Query Manager within PeopleSoft. [PeopleSoft Query Manager Guide](https://docs.oracle.com/cd/F28299_01/pt857pbr3/eng/pt/tpsq/concept_PeopleSoftQueryOverview-c07506.html).
   * **PeopleSoft nVision Guide**: Explore how to use nVision for reporting. [PeopleSoft nVision Guide](https://docs.oracle.com/cd/F28300_01/psft/pdf/pt857tnvs-b022020.pdf).
3. **Training Courses and Tutorials**:
   * **Oracle University - PeopleSoft Training**: Oracle offers training courses and tutorials on PeopleSoft, which can be beneficial if you're new to the system or need a refresher. The free tutorials can be found here. [Oracle University - PeopleSoft Training](https://docs.oracle.com/cd/E52319_01/infoportal/training.html).
   * **PeopleSoft Query Tutorials on YouTube**: Search for PeopleSoft query and reporting tutorials on YouTube for step-by-step visual guides. Example search: ["PeopleSoft Query Tutorial"](https://www.youtube.com/results?search_query=peoplesoft+query+tutorial).
4. **MGMA and PeopleSoft Support**:
   * **MGMA Support**: If you need further assistance with pulling reports or understanding MGMA survey requirements, contact MGMA’s Data Solutions team. You can reach them via the contact information provided on the MGMA survey participation page.
   * **Oracle Support**: For technical support related to PeopleSoft, consult Oracle Support for guidance. [Oracle Support](https://support.oracle.com/portal/).

**Example: Creating a Simple Query in Query Manager for MGMA Survey**

1. **Log in to PeopleSoft**.
2. **Navigate to Query Manager**: Reporting Tools > Query > Query Manager.
3. **Create a New Query**:
   * Click on "Create New Query".
   * Select the record (table) needed for the MGMA survey (e.g., Compensation, Payroll).
4. **Add Fields**:
   * Select the fields relevant to the MGMA survey (e.g., Compensation, Hours Worked, Job Titles).
5. **Add Criteria**:
   * Apply necessary filters to match the MGMA survey requirements.
6. **Save and Run the Query**.
7. **Review Results**: Use Query Viewer to verify the data before exporting and uploading to the MGMA survey platform.

By following these tailored steps and utilizing the available resources, you’ll be well-prepared to pull the necessary data from PeopleSoft and successfully complete the MGMA survey.