



PeopleSoft Query Manager v9.1

Training Manual

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PURPOSE

Welcome to PeopleSoft Query Manager Basics! This manual contains the tools needed to learn the concepts and procedures involved in creating and running queries in PeopleSoft Query Manager. Users will learn the basic functions of Query Manager including, searching for predefined queries, creating new queries, managing queries, running queries, and exporting query results.

By the end of this course, users should have the tools and information necessary to:

- Access Query Manager
- Navigate Query Manager
- Find Existing Queries
- Manage Queries
- Create and Modify Queries
- Run Queries

CHAPTER 1 - GETTING STARTED

Topic 1: Accessing PeopleSoft Query

PeopleSoft databases are accessed through an internet web browser. The following URLs currently provide access to the Financial Applications. Enter the URL in the Address field of the web browser. Contact a supervisor for updated addresses for production, reporting, quality assurance, and user training purposes.

**** SPECIFIC TO CLIENT SYSTEM****



Add PeopleSoft database URLs to the web browser's Favorites Folder for easy access to PeopleSoft databases.

Query options display based on user roles and security. To access PeopleSoft Query functions, expand or double-click **Reporting Tools** in the Navigation Menu. The **Query** folder contains links to Query Manager, Query Viewer, and Query Scheduler.

Query Manager: Allows users to create new queries, modify existing queries, and schedule queries to run at a later date.

Query Viewer: Provides 'read-only' access to predefined queries. Users can search, run, print, and download query data.

Query Scheduler: Allows users to manage queries scheduled to run at a later date.

CHAPTER 2 - QUERY MANAGER

To open Query Manager, navigate to Reporting Tools and access Query. Access to Query Manager and its functions is based on user security. Some options may not be available to all users.



Figure 1

Query Manager opens in query search mode. From the main Query Manager Page, users search for an existing query using Basic or Advanced Search, and create new queries

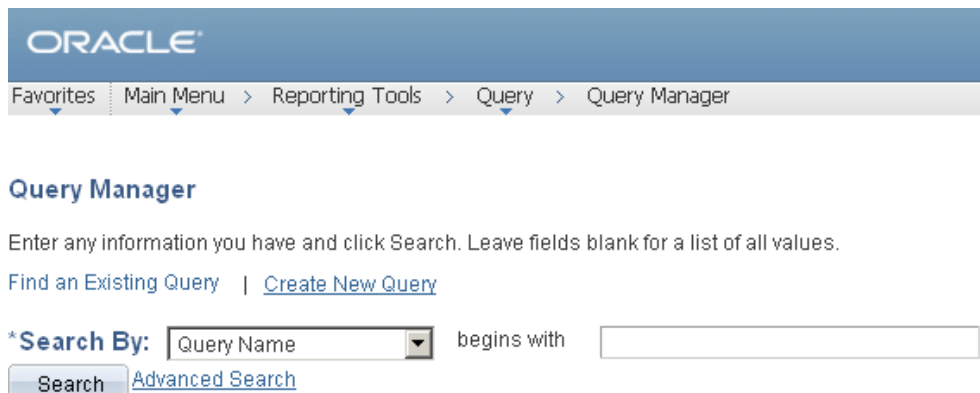


Figure 2

Query Manager is organized as a group of pages. The pages open when accessing an existing query, and when building a new query. Each page serves a function when creating, modifying, or reviewing queries.

Topic 1: Records Page

The Records Page provides Basic and Advanced Searches to find records in the PeopleSoft database. The Records Page provides search, preview, and join functionality.

Access the Records Page to:

- Search for Records
- Preview Fields
- Add/Join Records

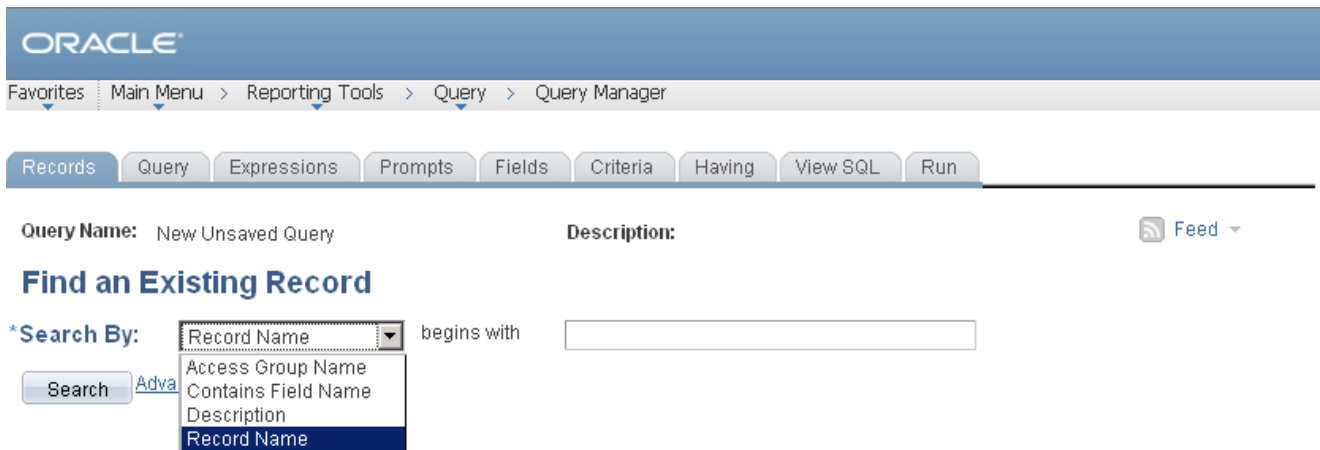


Figure 3

Records Search Information:

- ▶ **Query Name and Description:** The name and description for an existing query displays at the top of the page. When creating a new query, 'New Unsaved Query' displays for the Query Name, and a Description will not display.
- ▶ **Search By:** The Basic Search and Advanced Search provide the following categories to guide a record search:
 - Access Group Name:** Provides a list of records based on security access to table information.
 - Contains Field Name:** Provides a list of records containing a specific field.
 - Description:** Provides a list of records with a keyword contained in the records descriptive name.
 - Record Name:** Provides a list of records based on the record's database name.

Basic Search: The Basic Search assumes that the criteria entered will be found at the beginning of the information requested. Leaving the criteria field blank returns all records. Use wildcards to expand the search beyond the 'Begins with' condition.



Use wildcards as placeholders for data when conducting a search. The most commonly used wildcard in PeopleSoft is the % symbol.

%value: Searches for data containing the word 'value' at the end of a data string.

%value%: Searches for data containing the word 'value' within a data string.

value%: Searches for data containing the word 'value' at the beginning of a data string.

Advanced Search: Opens a search page allowing the use of conditional operators to expand the flexibility of searching for records. Advanced Search uses the same fields for the Search By options as the Basic Search. Access Conditional Operators from the drop-down list.

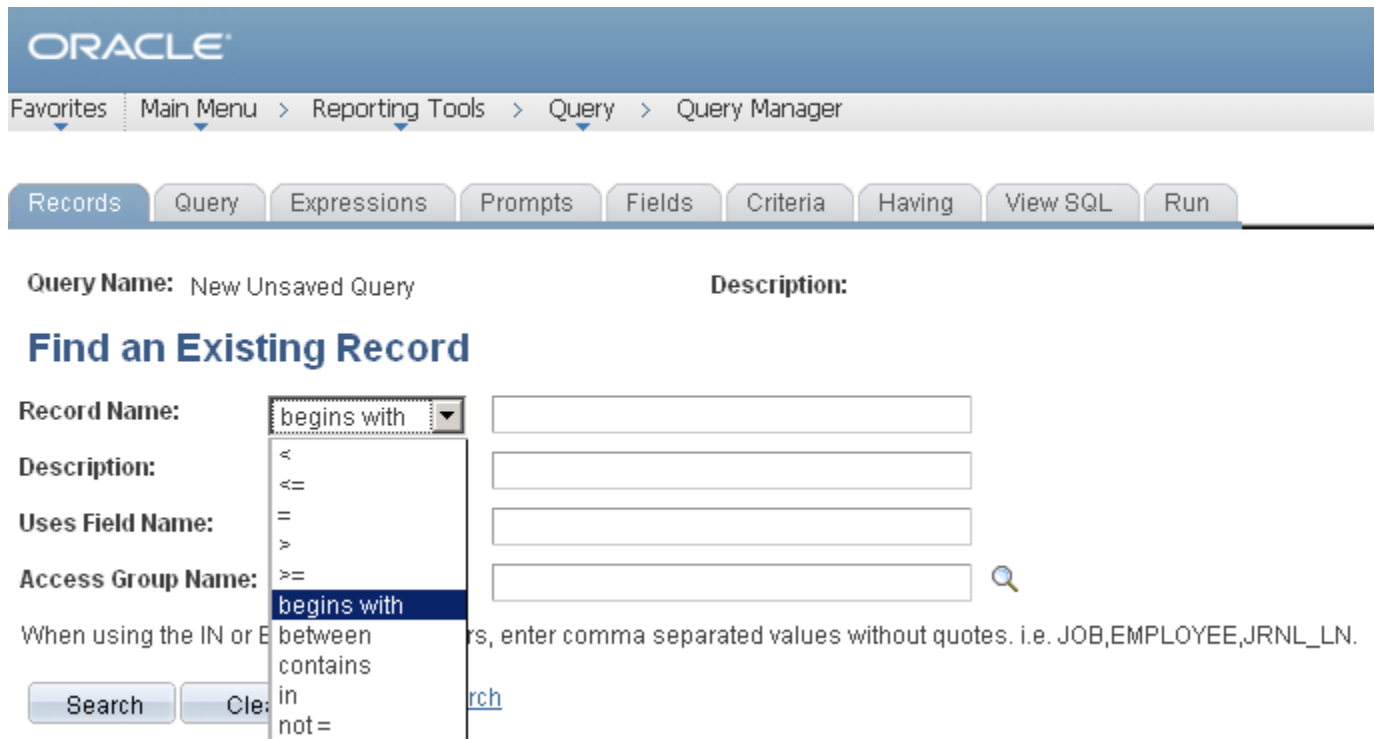


Figure 4

<	Results are less than the criteria entered.
<=	Results are less than or equal to the criteria entered.
=	Results are exactly equal to the criteria entered.
>	Results are greater than the criteria entered.
>=	Results are greater than or equal to the criteria entered.
Begins with	Results begin with the criteria entered.
Between	Results fall within and include the range entered. Separate range with commas.
Contains	Results contain some form of the criteria entered. Entering beg would return Beginning, Beg., etc.
In	Results presented have one or more of the criteria entered. Separate criteria with commas. Entering Ledger and Bank would produce results containing either ledger or bank.
Not =	Results do not include the criteria entered. Entering Ledger will prevent Ledger from returning.

Records meeting the criteria entered returns in a list. From the results, add records to the query, or preview the fields contained within the record.

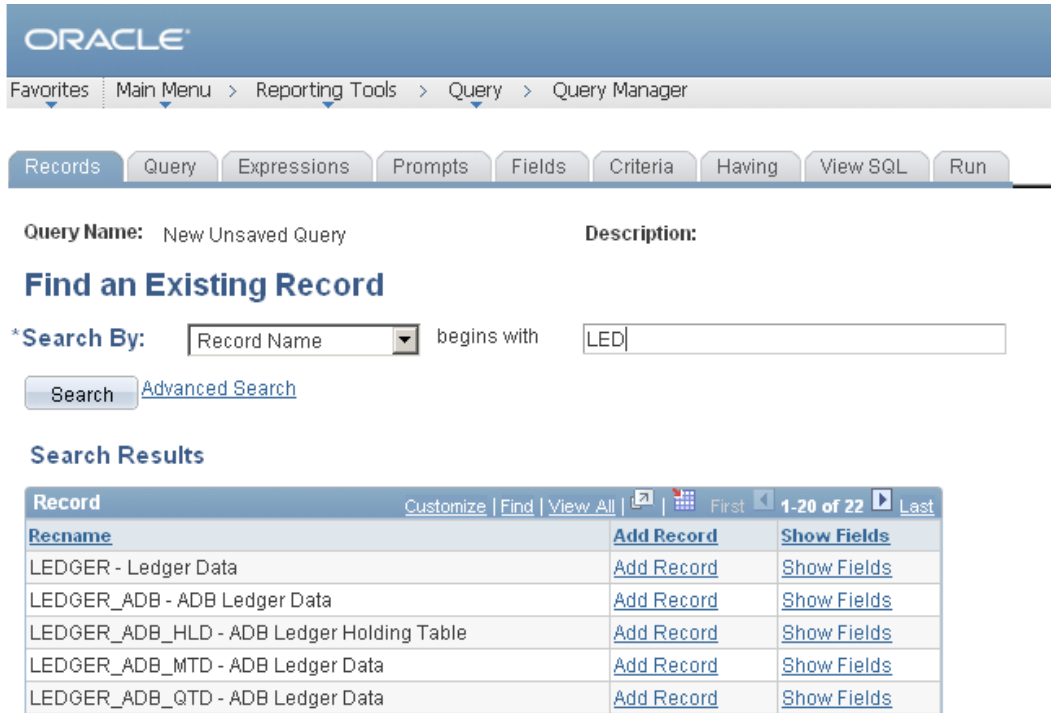


Figure 5

- **Rename:** Displays the name and description of the record retrieved by the search.
- **Add Record/Join Record:** Adds the record to the query. **Add Record** opens the Query Page to add fields to the query. After the first record is added, **Add Record** changes to **Join Record**. Each time a new record is needed, navigate to the Records tab to search and join a record.
- **Show Fields:** Previews the fields contained in the record. Previewing the fields helps determine if the record will meet the needs of the query.

Fields for record LEDGER - Ledger Data:

Fieldname	Description
Y	BUSINESS_UNIT - Business Unit
Y	LEDGER - Ledger
Y	ACCOUNT - Account

Figure 6

- **Key:** A key field is a unique identifier in a record. There can be a single or multiple key fields for each record. A key field displays 'Y' in the column next to the field name. Using all key fields prevents the retrieval of duplicate rows of data. For example, omitting the Effective Date key field from a query retrieves multiple rows of like data, each with a different Effective Date.
- **Description:** Displays the field name and the description of the data field.

Topic 2: Query Page

The Query Page displays records selected for the query and fields contained within the records. A folder with an alias name represents each record. The record folders expand to display fields. A field used for the query has a checkmark next to its name. Navigate between the Records Page and Query Page to add additional records and fields.

Access the Query Page to:

- Add Fields
- Create Record Joins
- Create Hierarchy Joins
- Add Criteria
- Delete Records



Figure 7

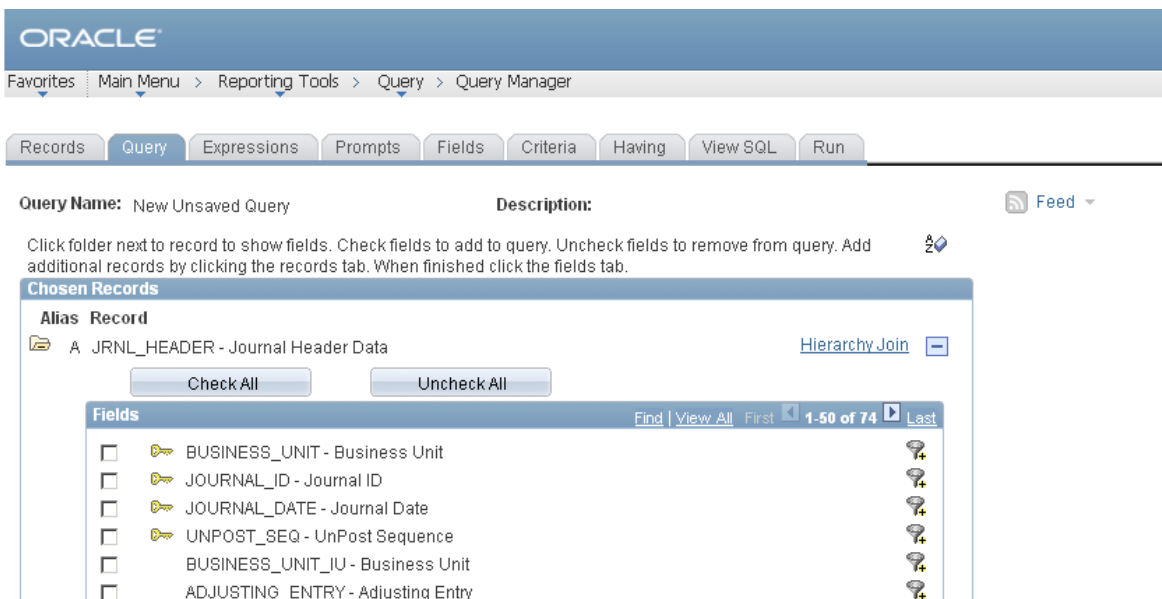







Figure 8

- **Query Name and Description:** The name and description for an existing query displays at the top of the page. When creating a new query, 'New Unsaved Query' displays for the Query Name, and a Description will not display.
-  **Record Name and Description:** The name of each record added to the query displays with a folder icon. Expand and collapse the folder to view and hide the fields contained in each record.
- The alpha character before the record name represents an alias name. The system assigns an alias name to distinguish fields having the same name in multiple records.
- **Field Name and Description:** The name and description of fields contained in a record display when a record folder is expanded.
-  **Key Field:** Indicates the field is a unique identifier for each record.
-  **Sort Fields:** Sorts the field display in alphabetical order. To remove the sort, click the icon again.
- **Hierarchy Join:** Joins a parent and child record. A Hierarchy Join link displays for each record in the query.
-  **Delete Record:** Removes a record from the query.
- **Select Fields:** Adds and removes fields from the query. **Check All Fields** selects all fields for the query. **Uncheck All Fields** removes the field selections.
- **Related Records Join:** Joins related records with common fields. If a field has a relationship with another record, a join link displays next to the field.
- **Expand All Records/Collapse All Records:** Expands and collapses folders for multiple records.
-  **Add Criteria:** Opens the Criteria Page to add filter conditions to the field.

Topic 3: Expressions Page

The Expressions Page is used to create calculations using Structured Query Language (SQL). Expression results can be displayed as a column in the query, or used as part of the query criteria.

Access the Expressions Page to:

- Build Expressions
- Add Expressions to a Query
- Add Expressions to Criteria
- Edit Expressions
- Delete Expressions

ORACLE

Favorites | Main Menu > Reporting Tools > Query > Query Manager

Records | Query | **Expressions** | Prompts | Fields | Criteria | Having | View SQL | Run

Query Name: New Unsaved Query Description: Feed ▾

[Add Expression](#)

Expression Text	Use as Field	Add Criteria	Edit	Delete
A.JRNL_TOTAL_DEBITS	Use as Field		Edit	-

[Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [Publish as Feed](#) [New Union](#) [Return To Search](#)

Figure 9

- Query Name and Description: The name and description for an existing query displays at the top of the page. When creating a new query, 'New Unsaved Query' displays for the Query Name, and a Description will not display.
- Add Expression: Opens the Edit Expression Properties Page for expression definition.
- Expression Text: Displays the logic defined in the Edit Expression Properties Page.
- Use as Field: Adds the results of the expression to the query results.
- Add Criteria: Opens the Edit Criteria Properties Page to create a criteria statement based on the expression results.
- Edit: Opens the Edit Expression Properties Page to modify an existing expression.
- Delete: Removes an expression from the query.

ORACLE®

Favorites Main Menu > Reporting Tools > Query > Query Manager

Edit Expression Properties

'Expression Type: Number Length: 1

Aggregate Function Decimals:

Expression Text: A.JRNL_TOTAL_DEBITS

[Add Prompt](#) [Add Field](#)

OK Cancel

Figure 10

- **Expression Type:** Create expressions using character, number, and date fields.
- **Length:** The digit/character length for the expression results.
- **Decimals:** The number of digits to display after the decimal in a numeric expression.
- **Aggregate Function:** Defines the expression as a calculation using a SQL function.
- **Add Field:** Adds a field to the expression.
- **Add Prompt:** Adds a prompt to the expression if the calculation relies on information entered by a user.

Topic 4: Prompts Page

Prompts allow users to enter data to filter a query. Creating prompts expands the use of a query beyond the needs of a single user. For example, adding prompts for Business Unit and Date Range expands the use of a general ledger query for use by all business units.

Access the Prompts Page to:

- Define Prompts
- Edit Prompts
- Delete Prompts

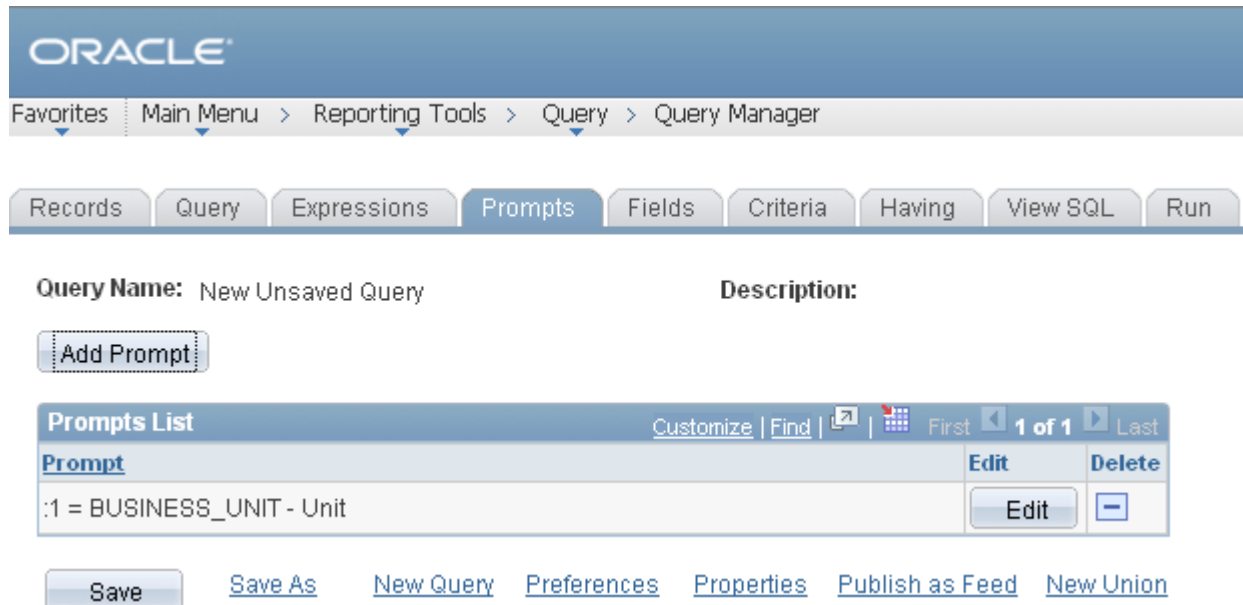


Figure 11

- Query Name and Description: The name and description for an existing query displays at the top of the page. When creating a new query, 'New Unsaved Query' displays for the Query Name, and a Description will not display.
- Add Prompt: Opens the Edit Prompt Properties Page to define a new prompt.
- Prompt: Displays the names of saved prompts.
- Edit: Opens the Edit Prompt Properties Page to modify an existing prompt.
- Delete: Removes the prompt from the query.

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Favorites | Main Menu > Reporting Tools > Query > Query Manager

Edit Prompt Properties

Field Name:

***Type:**

***Format:**

Length:

Decimals:

***Edit Type:**

***Heading Type:**

Heading Text:

***Unique Prompt Name:**

Prompt Table:

OK Cancel

Figure 12

- **Field Name:** Defines the field used for the prompt comparison.
- **Type:** Defines the data format of the field selected. Formats include character, number, and date. The information for this field auto populates based on the database definition for the field.
- **Format:** Defines the data format for the field and prompt. This field auto populates based on the database definition for the field.
- **Length:** Defines the length of the character or number for the field and prompt. This field auto populates based on the database definition for the field.
- **Decimals:** Defines the decimal placement for a number field and prompt. This field auto populates based on the database definition for the field.
- **Edit Type:** Defines the type of field edit for the prompt. This field auto populates based on the edit type defined for the field on the database.
- **Heading Type:** Defines the text displayed when the prompt is presented to the user.
- **Heading Text:** Defines label for the prompt when Heading Type of Text is selected.
- **Unique Prompt Name:** The system assigned unique identifier for the prompt.
- **Prompt Table:** Defines the database table to be used when comparing data entered by the user with the field.

Topic 5: Fields Page

The Fields Page provides information regarding the individual fields selected to display in the query results.

Access the Fields Page to:

- Define Criteria
- Define Expressions
- Edit Column Headings
- Define Sort Order
- Define Column Display Order
- Delete Fields from the Query

ORACLE

Favorites > Main Menu > Reporting Tools > Query > Query Manager

Records Query Expressions Prompts **Fields** Criteria Having View SQL Run

Query Name: New Unsaved Query Description: Feed

View field properties, or use field as criteria in query statement. [Reorder / Sort](#)

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.BUSINESS_UNIT - Business Unit	Char5				Unit		Edit	
2	A.JOURNAL_ID - Journal ID	Char10				Journal ID		Edit	
3	A.JOURNAL_DATE - Journal Date	Date				Date		Edit	
4	A.UNPOST_SEQ - UnPost Sequence	Num2.0				Seq		Edit	
5	A.FISCAL_YEAR - Fiscal Year	Num4.0				Year		Edit	
6	A.ACCOUNTING_PERIOD - Accounting Period	Num3.0				Period		Edit	

[Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [Publish as Feed](#) [New Union](#) [Return To Search](#)

Figure 13

- Query Name and Description:** The name and description for an existing query displays at the top of the page. When creating a new query, 'New Unsaved Query' displays for the Query Name, and a Description will not display.
- Column:** Designates the display order of the fields in the query results.
- Record.Fieldname:** Displays the record and field name.
- Format:** Displays the database format definition for the field.
- Ord:** Displays the sort order for the field. If descending sort order is defined, 'D' will also display in this column.
- XLAT:** Displays the value to appear in the query results when a Translate Table is used. .
- "N" indicates no value will display in the query results.

- “S” indicates the code, or short value, will display in the query results.
- “L” indicates the code description, or long value, will display in query results.
- **Agg:** Displays the Aggregate Function defined for a field.
- **Heading Text:** Displays the column heading used in query results.
- **Add Criteria:** Defines filter criteria using the field. If the field has an expression defined, the Edit Having Criteria Properties Page will display. If the field does not have an expression defined, the Edit Criteria Properties Page will display.
- **Edit:** Opens the Edit Field Properties Page to define aggregate functions, column display order, column headings, and sort order for the field.
- **Delete:** Removes the field from displaying in query results.
- **Reorder/Resort:** Opens the Edit Field Ordering Page to change the column display and data sort order.

ORACLE

Favorites | Main Menu > Reporting Tools > Query > Query Manager

Edit Field Properties

Field Name: A.BUSINESS_UNIT - Business Unit

Heading	Aggregate
<input type="radio"/> No Heading <input checked="" type="radio"/> RFT Short <input type="radio"/> Text <input type="radio"/> RFT Long Heading Text: <input type="text" value="Unit"/> *Unique Field Name: <input type="text" value="A.BUSINESS_UNIT"/>	<input checked="" type="radio"/> None <input type="radio"/> Sum <input type="radio"/> Count <input type="radio"/> Min <input type="radio"/> Max <input type="radio"/> Average
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

Figure 14

- **Field Name:** Displays the alias name of the field being modified.
- **Column:** Defines which column the data appears in the query results.
- **Order By Number:** Defines the sort order for the field.
- **Descending:** Defines ascending/descending sort order for the field.
- **Heading:** Defines the column heading to display in query results.
- **Heading Text:** Defines the column heading to display if the Text option is selected.
- **Unique Field Name:** Displays the alias name of the field.
- **Aggregate:** Defines the field to return a single value for multiple rows of data.

Edit Field Ordering

Reorder columns by entering column numbers on the left. Columns left blank or assigned a 0 will be automatically assigned a number. Change the order by number by entering numbers on the right. To remove an order by number, leave the field blank or enter a 0.

Edit Field Ordering					
Customize Find View All [?] [Grid] First 1-6 of 6 Last					
New Column	Column	Record.Fieldname	Order By	Descending	New Order By
	1	A.BUSINESS_UNIT - Business Unit		<input type="checkbox"/>	
	2	A.JOURNAL_ID - Journal ID		<input type="checkbox"/>	
	3	A.JOURNAL_DATE - Journal Date		<input type="checkbox"/>	
	4	A.UNPOST_SEQ - UnPost Sequence		<input type="checkbox"/>	
	5	A.FISCAL_YEAR - Fiscal Year		<input type="checkbox"/>	
	6	A.ACCOUNTING_PERIOD - Accounting Period		<input type="checkbox"/>	

OK Cancel

Figure 15

- **New Column:** Entry field for assigning a new column display position for the field.
- **Column:** The current column display position for the field.
- **Record.Fieldname:** The record and field name for the data.
- **Order By:** The current sort order for the field.
- **Descending:** Indicates if the data is sorted in descending or ascending order.
- **New Order By:** Entry field for assigning a new sort order for the field.

Topic 6: Criteria Page

A query without criteria retrieves every row of data in the record. Criteria statements filter the data to narrow results. Criteria statements filter data by comparing field values, expressions, and logical operators.

Access the Criteria Page to:

- Define Criteria
- Edit Criteria
- Group Criteria
- Reorder Criteria
- Delete Criteria

ORACLE

Favorites Main Menu > Reporting Tools > Query > Query Manager

Records Query Expressions Prompts Fields **Criteria** Having View SQL Run

Query Name: New Unsaved Query Description: Feed

[Add Criteria](#) [Group Criteria](#) [Reorder Criteria](#)

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
<input type="text"/>	A.BUSINESS_UNIT - Business Unit	equal to	:1	Edit	-
AND	A.ACCOUNTING_PERIOD - Accounting Period	equal to	1	Edit	-
AND	A.JOURNAL_ID - Journal ID	like	GL%	Edit	-

[Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [Publish as Feed](#) [New Union](#) [Return To Search](#)

Figure 16

- **Query Name and Description:** The name and description for an existing query displays at the top of the page. When creating a new query, 'New Unsaved Query' displays for the Query Name, and a Description will not display.
- **Add Criteria:** Opens the Edit Criteria Properties Page to define criteria.
- **Group Criteria:** Opens the Edit Criteria Grouping Page to apply grouping logic to the criteria when multiple operators of different types are used.
- **Reorder Criteria:** Opens the Edit Criteria Ordering Page to change the order criteria is applied to the query.
- **Logical:** Displays the operator applied to connect the criteria statements. A drop-down list provides available options.
- **Expression 1:** Displays the field or expression defined as the filter data.
- **Condition Type:** Displays the comparison operator defined for the filter.
- **Expression 2:** Displays the field or expression defined as the comparison data for the filter.
- **Edit:** Opens the Edit Criteria Properties Page to define criteria.
- **Delete:** Removes the criteria from the query.

Edit Criteria Properties

Choose Expression 1 Type

Field

Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:

Condition Type:

Choose Expression 2 Type

Field

Expression

Constant

Prompt

Subquery

Expression 2

Define Constant

Constant:

Figure 17

- **Expression 1:** Defines the data to be filtered. If the filter is based on a field, the field containing the data will be defined. If the filter is based on an expression, the expression will be defined.
- **Condition Type:** Defines the comparison logic for the two expressions. The Condition Type determines the definition of Expression 2. If Expression 1 is an Effective Date, special condition types become available.
- **Expression 2:** Defines the comparison data or value. Data from Expression 1 compares to the data in Expression 2. The query retrieves data meeting the condition.

ORACLE

Favorites Main Menu > Reporting Tools > Query > Query Manager

Edit Criteria Grouping

Use the edit boxes to enter parenthesis for each criteria. Use only the '(' and ')' characters.

Logical	Left Paren	Expression1	Condition Type	Expression 2	Right Paren
	<input type="text"/>	A.BUSINESS_UNIT - Business Unit	equal to	:1	<input type="text"/>
AND	<input type="text"/>	A.ACCOUNTING_PERIOD - Accounting Period	equal to	1	<input type="text"/>
AND	<input type="text"/>	A.JOURNAL_ID - Journal ID	like	GL%	<input type="text"/>

OK Cancel

Figure 18

- **Logical:** The logic operator connecting the criteria statements.
- **Grouping Field 1:** The entry field for parenthesis to group criteria statements.
- **Expression 1:** The logic defined for the filtering expression.
- **Condition Type:** The logic defined for the expression operator.
- **Expression 2:** The logic defined for the comparison data.
- **Grouping Field 2:** The entry field for parenthesis to group criteria statements.

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Favorites Main Menu > Reporting Tools > Query > Query Manager

Edit Criteria Ordering

Reorder criteria by entering position numbers on the left. Rows left blank or assigned a 0 will be automatically assigned a position.

New Position	Position	Expression1	Condition Type	Expression 2
<input type="text"/>	1	A.BUSINESS_UNIT - Business Unit	equal to	:1
<input type="text"/>	2	A.ACCOUNTING_PERIOD - Accounting Period	equal to	1
<input type="text"/>	3	A.JOURNAL_ID - Journal ID	like	GL%

OK Cancel

Figure 19

- **New Position:** The entry field for changing the order the query applies the criteria statement.
- **Position:** The current order the query applies the criteria statement.
- **Expression 1:** The logic defined for the filtering expression.
- **Condition Type:** The logic defined for the comparison operator.
- **Expression 2:** The logic defined for the comparison data.

Topic 7: Having Page

Add expression results to criteria statements using the Having Page. The Criteria Page only allows fields contained within a record to be added to criteria statements. For example, creating a query to provide a list of journal entries, where the sum of the journal entries for a date range is greater than zero, requires Having Criteria. An expression defines the sum of the journal entries. The result of the journal entry expression is added to a criteria statement to retrieve only those amounts having a total amount greater than zero. The query performs the calculation before applying the criteria statement.

Access the Having Page to:

- Add Expression Results to Criteria
- Edit Having Criteria
- Group Having Criteria
- Reorder Having Criteria
- Delete Having Criteria



Figure 20

- **Query Name and Description:** The name and description for an existing query displays at the top of the page. When creating a new query, 'New Unsaved Query' displays for the Query Name, and a Description will not display.
- **Add Having Criteria:** Opens the Edit Having Criteria Page to define criteria using an expression result.
- **Group Criteria:** Opens the Edit Criteria Grouping Page to apply grouping logic to the criteria when multiple operators of different types are used.
- **Reorder Criteria:** Opens the Edit Criteria Ordering Page to change the order the query applies criteria statements.
- **Logical:** Displays the operator connecting the criteria statements.
- **Expression 1:** Displays the field or expression defined as the filter data.
- **Condition Type:** Displays the comparison operator defined for the filter.
- **Expression 2:** Displays the field or expression defined as the comparison data for the filter.
- **Edit:** Opens the Edit Having Criteria Properties Page to define criteria.
- **Delete:** Removes criteria statements from the query.

Edit Having Criteria Properties

Choose Expression 1 Type

Field

Expression

Expression 1

Define Expression

Expression: A.JRNL_TOTAL_DEBITS

[New Expression](#) [Edit the Expression](#)

Condition Type: equal to

Choose Expression 2 Type

Field

Expression

Constant

Prompt

Subquery

Expression 2

Define Constant

Constant:

OK Cancel

Figure 21

- **Expression 1:** Defines the data to be filtered. If the filter is based on a field, the field containing the data will be defined. If the filter is based on an expression, the expression will be defined.
- **Condition Type:** Defines the comparison logic for the two expressions. The condition type selected determines how Expression 2 is defined. If Expression 1 is an Effective Date, special condition types become available.
- **Expression 2:** Defines the comparison data or value. Data from Expression 1 is compared to the data in Expression 2. Data meeting the condition will be retrieved by the query.

Edit Criteria Grouping

Use the edit boxes to enter parenthesis for each criteria. Use only the '(' and ')' characters.

Edit Criteria Grouping						Customize Find First 1 of 1 Last
Logical	Left Paren	Expression1	Condition Type	Expression 2	Right Paren	
	<input type="text"/>	A.JRNL_TOTAL_DEBITS	equal to	0	<input type="text"/>	

OK Cancel

Figure 22

- **Logical:** The logic operator connecting the criteria statements.
- **Grouping Field 1:** The entry field for parenthesis to group criteria statements.
- **Expression 1:** The logic defined for the filtering expression.
- **Condition Type:** The logic defined for the expression operator.
- **Expression 2:** The logic defined for the comparison data.
- **Grouping Field 2:** The entry field for parenthesis to group criteria statements.

Topic 8: View SQL Page

The View SQL Page displays the definition of the query in Structured Query Language. Query Manager takes all fields, expressions, calculations, and criteria for the query and compiles it into SQL. Viewing SQL helps identify logic and data issues with queries. In addition, use the SQL of a working query with other query tools that may offer more flexibility in designing queries.

ORACLE								
Favorites Main Menu > Reporting Tools > Query > Query Manager								
Records	Query	Expressions	Prompts	Fields	Criteria	Having	View SQL	Run
Query Name: New Unsaved Query		Description:			Feed ▾			
Query SQL:								
<pre>SELECT A.BUSINESS_UNIT, A.JOURNAL_ID, (CONVERT(CHAR(10),A.JOURNAL_DATE,121)), A.UNPOST_SEQ, A.FISCAL_YEAR, A.ACCOUNTING_PERIOD FROM PS_JRNL_HEADER A WHERE A.BUSINESS_UNIT = :1 AND A.ACCOUNTING_PERIOD = 1 AND A.JOURNAL_ID LIKE 'GL%' HAVING A.JRNL_TOTAL_DEBITS = '0'</pre>								

Figure 23

Topic 9: Preview Page

Use the Run Page to review query results prior to saving, printing, or downloading the query. From Run, navigate query results, refresh data after adding new information, and download the results to Excel.

ORACLE® Home

Favorites | Main Menu > Reporting Tools > Query > Query Manager

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Unit = US001

View All | [Rerun Query](#) | [Download to Excel](#) | [Download to XML](#) First 1-32 of 32 Last

	Unit	Journal ID	Date	Seq	Year	Period
1	US001	GL6_BENFT	01/01/1999	0	1999	1
2	US001	GL6_EXPROD	01/01/1999	0	1999	1
3	US001	GL6_OTHEXP	01/01/1999	0	1999	1
4	US001	GL6_RNTEXP	01/01/1999	0	1999	1
5	US001	GL6_SLSMK1	01/01/1999	0	1999	1
6	US001	GL6_SLSMK2	01/01/1999	0	1999	1

Figure 24

- **Prompts Used:** If prompts were used to execute the query, the name of the prompt and the data entered by the user displays above the query results.
- **View All:** Select to view all query results without pagination.
- **Rerun Query:** Select to refresh the query results.
- **Download to Excel:** Select to open query results in Excel

Topic 10: Query Manager Common Actions

Navigating Results

After performing a search in Query Manager, results consistently display with a header to navigate through the results.

Search Results Too many items met your search criteria. Only the first 300 items displayed.

Record	Customize Find View 100 First 1-20 of 300 Last	
<u>Recname</u>	<u>Add Record</u>	<u>Show Fields</u>
1099C_CUST_DATA - 1099C Customer Data	<u>Add Record</u>	<u>Show Fields</u>
AB_CONVER_WW - Action List Conversation View	<u>Add Record</u>	<u>Show Fields</u>

Figure 25

- **View All:** Displays the search results on one page. By default, Query Viewer only displays 30 results at a time. Select View All to display all the records retrieved without pagination. The link reverts to View 30 after the results are displayed.
- **Page Navigation:** The Query header displays the number of records displayed and the number of records retrieved. Quickly navigate to the first and last results pages using the First and Last link. Navigate one page at a time using the arrow buttons.

Customizing Query Manager

Every search performed in Query Manager produces a results page with a header. Customize results display to suit the needs of the individual user. The customization attaches to the User ID and database instance. Future search results for the page display in the order requested. Customizing the results display for one page does not affect the results on another page.

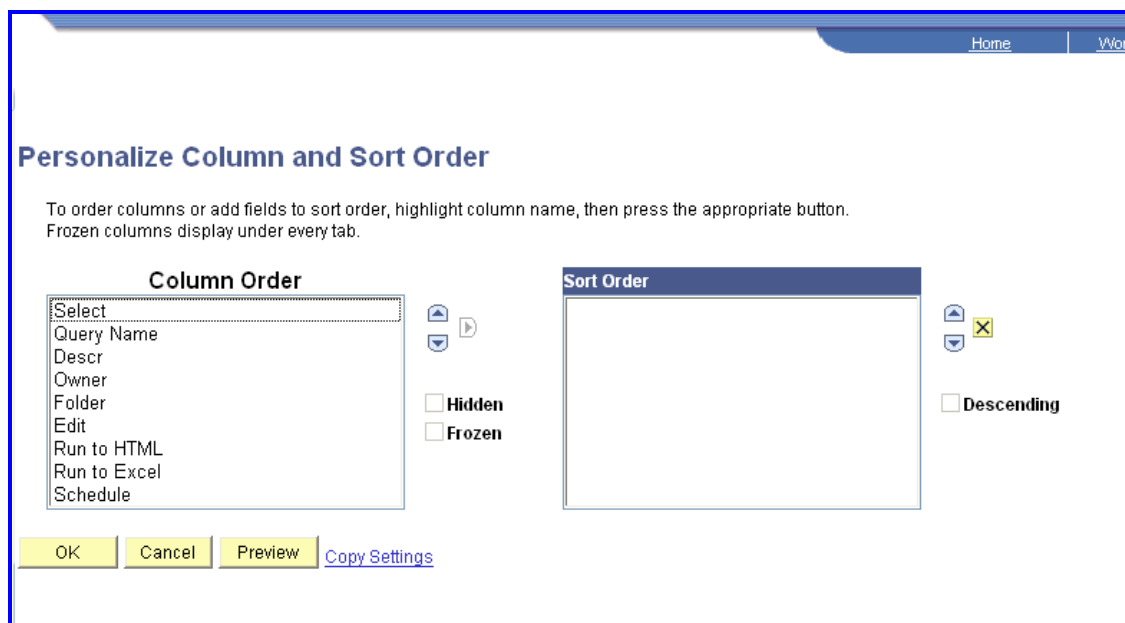


Figure 26

Customize Search Results Display

Select Customize from the Navigation Header.

Select the column title from the Column Order list.

Use the up and down arrow buttons to move the column title.

Customize Search Results Sort

Select Customize from the Navigation Header.

Select the column title from the Column Order list.

Use the right arrow button to copy the column title to the Sort Order list.

If multiple column titles are added to the Sort Order list, use the up and down arrow buttons to move the column title.

Remove Columns from Sort

Select Customize from the Navigation Header.

Select the column title from the Sort Order list.

Select the delete icon to remove the column title.

Sort in Descending Order

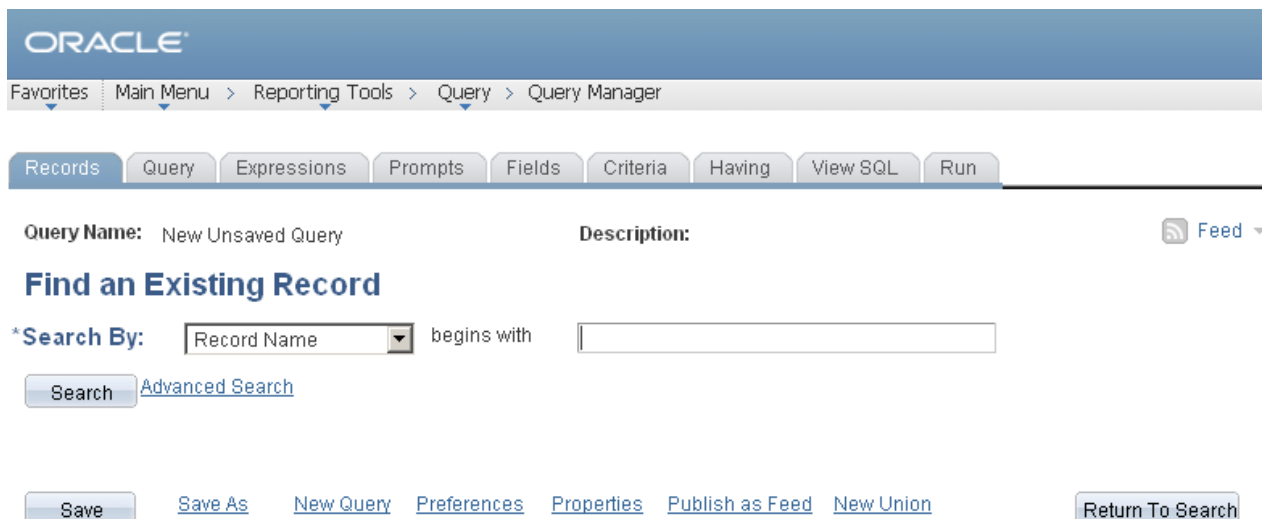
Select Customize from the Navigation Header.

Select the column title from the Sort Order list.

Select the delete icon to remove the column title.

Query Manager Commands

The following commands display at the bottom of Query Manager Pages.



The screenshot shows the Oracle Query Manager interface. At the top, there is a blue header with the Oracle logo. Below the header is a breadcrumb trail: Favorites > Main Menu > Reporting Tools > Query > Query Manager. A row of tabs is visible: Records (selected), Query, Expressions, Prompts, Fields, Criteria, Having, View SQL, and Run. Below the tabs, the 'Query Name' is 'New Unsaved Query' and the 'Description' field is empty. A 'Feed' icon is on the right. The main section is titled 'Find an Existing Record'. Underneath, there is a search form with a dropdown menu set to 'Record Name', followed by the text 'begins with' and an empty input field. Below the input field is a 'Search' button and a link to 'Advanced Search'. At the bottom of the interface, there is a row of buttons: Save, Save As, New Query, Preferences, Properties, Publish as Feed, New Union, and Return To Search.

Figure 27

Save/Save As: Use Save or Save As to commit query changes. Save overwrites the existing query. Save As saves a copy of the query.

Figure 28

- **Query:** Name the query using standard naming conventions.
- **Description:** A short description of the query's purpose.
- **Folder:** The name of the folder where the query was saved.
- **Query Type:** Defines the query's intended use.
 - Archive: Used by the Data Archive Manager process.
 - User: Used to retrieve data directly from the PeopleSoft database.
 - Role: Used to determine contacts and communications links when working with PeopleSoft Business process.
 - Process: Runs periodically as a batch process.
- **Owner:** Save queries as either Public or Private. Public queries can be executed, opened, modified, or deleted by anyone with proper security access. Private queries can only be executed, opened, modified, or deleted by the individual who created the query.
- **Query Definition:** A description and purpose of the query.

New Query: Opens the Records Page to start building a new query.

Preferences: Defines the display of record and field descriptions, enables automatic record joins, and enables auto preview. Preferences are User ID specific. Changes made to preferences will apply to each query created by the user.

Figure 29

- **Name Style:** Defines the display of record and field names throughout Query Manager Pages.
- **Enable Auto Join:** Determines fields creating a record join when adding multiple records to a query.
- **Enable Auto Preview:** Causes the query to automatically rerun when accessing the Preview Page.

Properties: Displays the properties for a saved query. Query Properties are specific to the query being created. The information will change with each query created

Figure 30

- **Query:** The name assigned to the query.
- **Description:** A short description of the query's purpose.
- **Folder:** The name of the folder used to categorize the query.
- **Query Type:** Defines the query's intended use.
- **Archive:** Used by the Data Archive Manager process.
- **User:** Used to retrieve data directly from the PeopleSoft database.
- **Role:** Used to determine contacts and communications links when working with PeopleSoft Business process.
- **Process:** Runs periodically as a batch process.
- **Query Definition:** A description and purpose of the query.
- **Last Updated Date/Time:** Provides the query creation or last modification date.
- **Last Update User ID:** Provides identification of the person who created or last modified the query.

New Union/Delete Union: Use to join separate queries. The Records Page is opened for users to begin creating an additional query.

Return to Search: Opens the main Query Manager Page.