



Specialized PeopleSoft 9.2

PeopleSoft v9.2 Query Manager

Basic and Advanced Course for FSCM & HCM

Training Guide

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PREFACE – COURSE OBJECTIVE

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

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.

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.

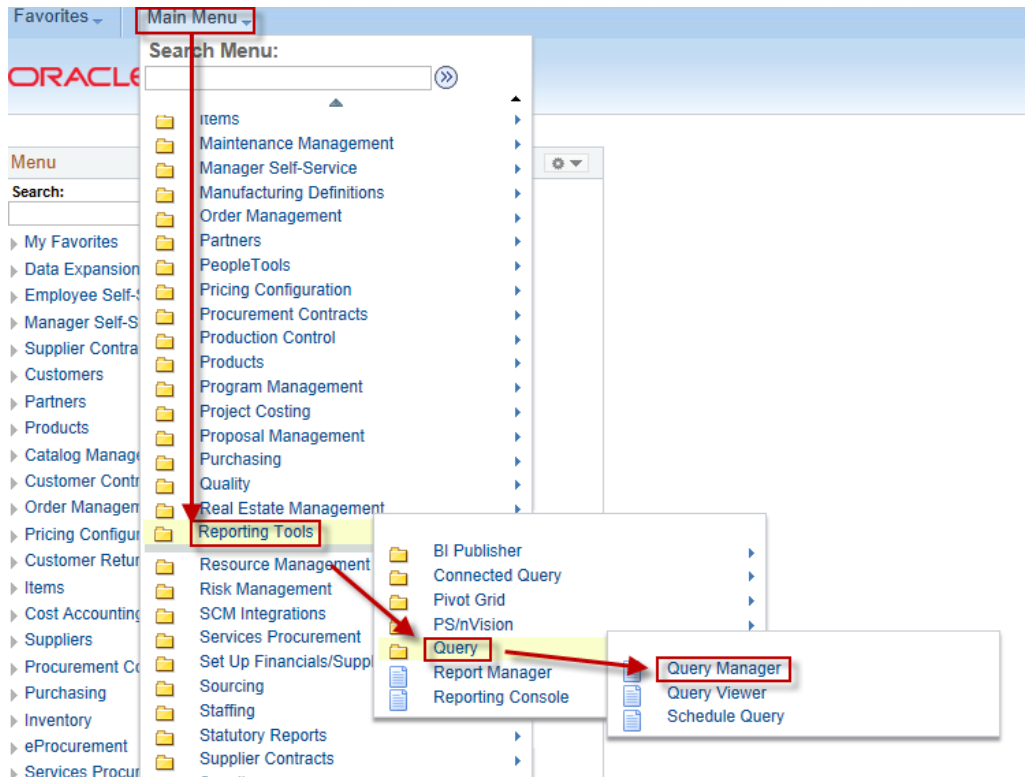
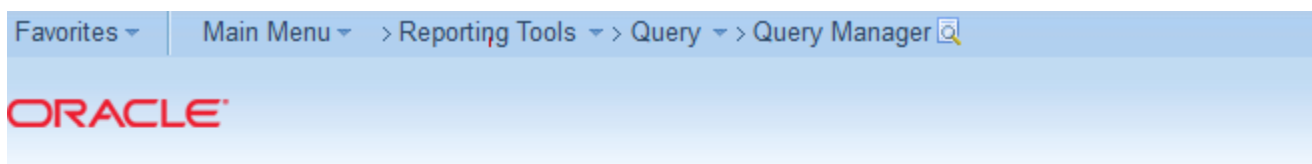


Figure 1

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



Query Manager

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Query | **Create New Query**

*Search By begins with

[Advanced Search](#)

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

The screenshot shows the Oracle Query Manager interface. At the top, there is a breadcrumb trail: Favorites > Main Menu > Reporting Tools > Query > Query Manager. Below this is the Oracle logo. The main interface has a tabbed menu with 'Records' selected. Below the tabs, there are fields for 'Query Name' and 'Description'. The 'Query Name' field contains '*Search By' and a dropdown menu is open, showing options: 'Access Group Name', 'Contains Field Name', 'Description', and 'Record Name'. The 'Record Name' option is selected. To the right of the dropdown is a text input field labeled 'begins with'. Below the input field is a 'Search' button and a link for 'Advanced Search'. At the bottom of the interface, there are buttons for 'Save', 'Save As', 'New Query', 'Preferences', 'Properties', 'Publish as Feed', 'New Union', and 'Return To Search'.

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.

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

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, but do not use <spaces>. Entering Ledger, Vendor would produce results containing both the LEDGER and Vendor records.
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.

The screenshot shows the Oracle Query Manager interface. At the top, there is a breadcrumb trail: Favorites > Main Menu > Reporting Tools > Query > Query Manager. Below this is the Oracle logo. A navigation bar contains tabs for Records, Query, Expressions, Prompts, Fields, Criteria, Having, Transformations, View SQL, and Run. The main area shows a query named 'New Unsaved Query' with a description field. A search criteria is set to 'Record Name' begins with 'LED'. A 'Search' button is highlighted. Below the search bar, the 'Search Results' section displays a table with 6 records. Each record has 'Recname', 'Add Record', and 'Show Fields' columns.

Record	Personalize	Find	View All	First	1-20 of 21	Last
Recname						
LEDGER - Ledger Data						
LEDGER_ADB - ADB Ledger Data						
LEDGER_ADB_MTD - ADB Ledger Data						
LEDGER_ADB_QTD - ADB Ledger Data						
LEDGER_ADB_YTD - ADB Ledger Data						

Figure 5

- **Recname:** 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:

The screenshot shows a table titled 'Fields for record LEDGER - Ledger Data:'. The table has columns for 'Fieldname', 'Key', and 'Description'. There are 35 fields in total, with the first three shown. Each field has a 'Y' in the 'Key' column, indicating it is a key field.

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

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

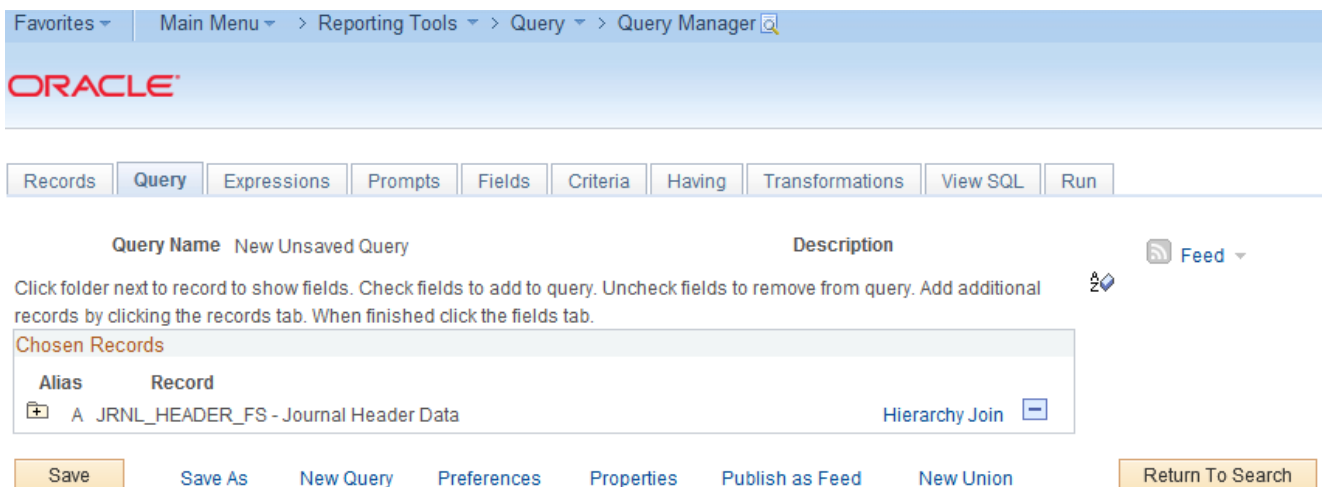


Figure 7

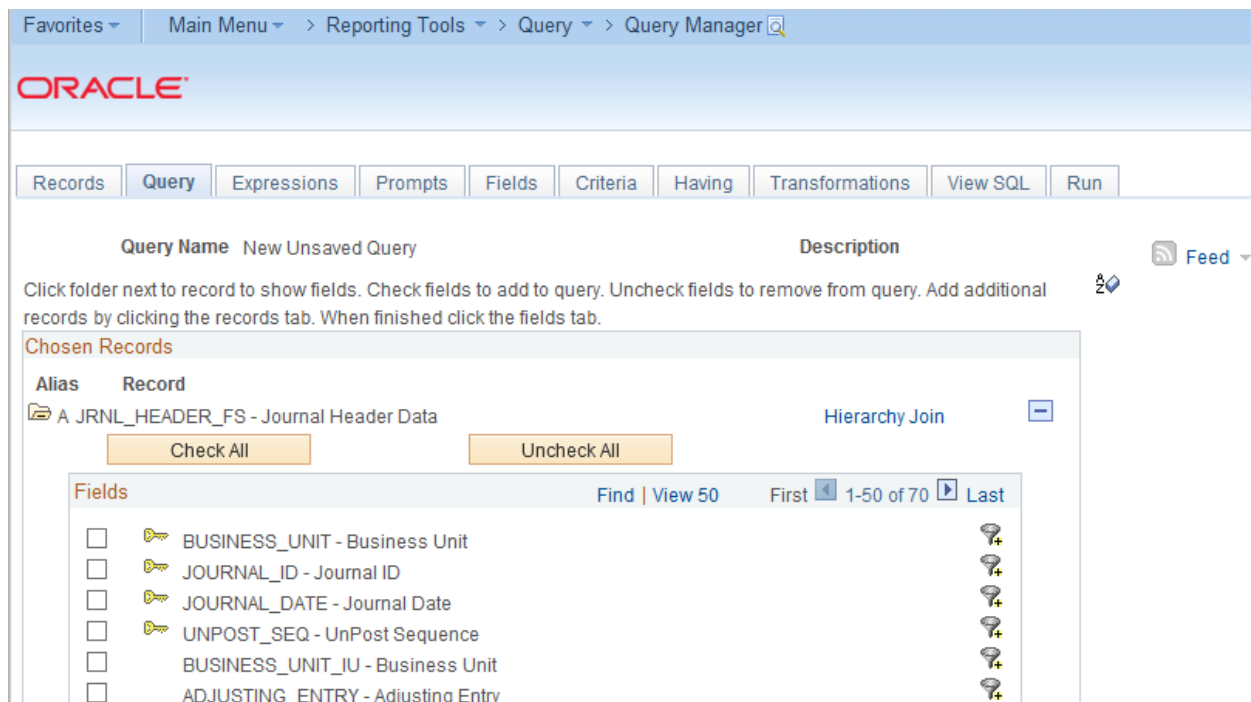







Figure 8

- **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

Query Name: New Unsaved Query Description: Feed

Add Expression

Expression Text	Use as Field	Add Criteria	Edit	Delete
AJRNL_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.

The screenshot shows a dialog box titled "Edit Expression Properties". It features a dropdown menu for "*Expression Type" currently set to "Number". To the right of this dropdown is a "Length" input field containing the number "1". Below the dropdown is a checked checkbox for "Aggregate Function" and an empty "Decimals" input field. A large text area labeled "Expression Text" contains the text "A.JRNL_TOTAL_DEBITS". At the bottom of the dialog, there are two blue buttons labeled "Add Prompt" and "Add Field", and two orange buttons labeled "OK" and "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

The screenshot shows the Oracle Prompts page interface. At the top, there is a navigation bar with tabs for Records, Query, Expressions, Prompts, Fields, Criteria, Having, Transformations, View SQL, and Run. Below the navigation bar, there is a section for 'Query Name' (New Unsavd Query) and 'Description'. A 'Feed' icon is visible. A 'Prompts List' table is displayed with one entry: ':1 = BUSINESS_UNIT - Unit'. The table has 'Edit' and 'Delete' buttons for each entry. At the bottom, there are buttons for 'Save', 'Save As', 'New Query', 'Preferences', 'Properties', 'Publish as Feed', 'New Union', and 'Return To Search'.

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 Unsavd 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.

Edit Prompt Properties

Field Name <input type="text" value="BUSINESS_UNIT"/>	*Heading Type <input type="text" value="RFT Short"/>
*Type <input type="text" value="Character"/>	Heading Text <input type="text" value="Unit"/>
*Format <input type="text" value="Upper"/>	*Unique Prompt Name <input type="text" value="BIND1"/>
Length <input type="text" value="5"/>	
Decimals <input type="text"/>	
*Edit Type <input type="text" value="No Table Edit"/>	Prompt Table <input type="text"/>
<input type="button" value="OK"/>	<input type="button" value="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

Query Name: New Unsaved Query Description

View field properties, or use field as criteria in query statement. Reorder / Sort Feed

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	
7	A.JRNL_TOTAL_DEBITS	Num1.0			Sum	A.JRNL_TOTAL_DEBITS		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 (None, Short, Long) to appear in the query results when a translate table field is used.
 - “N” indicates the code will display in the query results.
 - “S” indicates the short description translate value, will display in the query results.
 - “L” indicates the long description, (i.e. long translate value), will display in the query results.
- **Agg:** Displays if an aggregate function is 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.

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

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

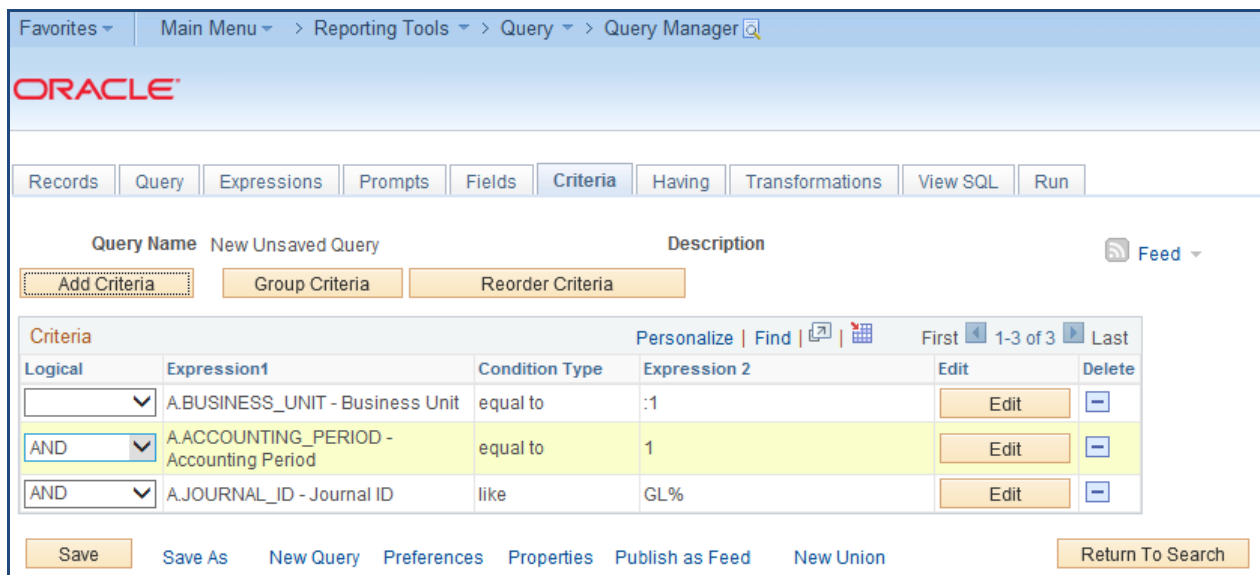


Figure 16

- **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.

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

ORACLE

Edit Criteria Properties

Choose Expression 1 Type

Field

Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:

🔍 A.ACCOUNTING_PERIOD - Accounti

*Condition Type:

equal to ▾

Choose Expression 2 Type

Field

Expression

Constant

Prompt

Subquery

Expression 2

Define Constant

Constant: 1 | 🔍

OK

Cancel

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.

Edit Criteria Grouping

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

Edit Criteria Grouping						Personalize	Find			First	1-3 of 3	Last
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"/>							

Figure 18

- **Logical:** The logic operator connecting the criteria statements.
- **Left Paren:** 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.
- **Right Paren:** The entry field for parenthesis to group criteria statements.

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.

Edit Criteria Ordering						Personalize	Find	View All			First	1-3 of 3	Last
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%									

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

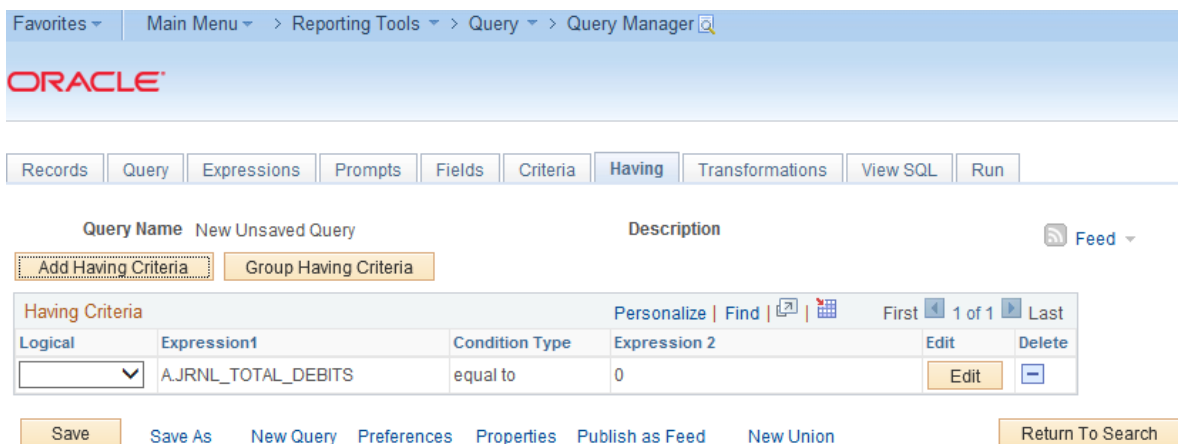


Figure 20

- **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.