PeopleSoft v9.2 Query Manager

Basic and Advanced Course for FSCM & HCM

Training Guide

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TABLE OF CONTENTS

PREFACE – COURSE OBJECTIVE 5

GETTING STARTED 6

TOPIC 1: ACCESSING PEOPLESOFT QUERY 6

QUERY MANAGER 7

TOPIC 1: RECORDS PAGE 9
TOPIC 2: QUERY PAGE 12
TOPIC 3: EXPRESSIONS PAGE 14
TOPIC 4: PROMPTS PAGE 16
TOPIC 5: FIELDS PAGE 18
TOPIC 6: CRITERIA PAGE 21
TOPIC 7: HAVING PAGE 24
TOPIC 8: VIEW SQL PAGE 26
TOPIC 9: PREVIEW PAGE 27
TOPIC 10: QUERY MANAGER COMMON ACTIONS 28

WORKING WITH EXISTING QUERIES 33

TOPIC 1: SEARCHING FOR EXISTING QUERIES 33
TOPIC 2: MANAGING QUERIES 39

WORKING WITH RECORDS 45

TOPIC 1: SEARCHING FOR RECORDS 45
TOPIC 2: PREVIEWING FIELDS 48
TOPIC 3: ADDING RECORDS 49
TOPIC 4: DELETING RECORDS 49

WORKING WITH FIELDS 50

TOPIC 1: ADDING FIELDS 50
TOPIC 2: CHANGING COLUMN DISPLAY ORDER 51
TOPIC 3: DEFINING SORT ORDER 53
TOPIC 4: CHANGING COLUMN HEADINGS 55
TOPIC 5: APPLYING AGGREGATE FUNCTIONS 56
TOPIC 6: DELETING FIELDS 60

WORKING WITH CRITERIA 61

TOPIC 1: DEFINING CRITERIA 61
TOPIC 2: WORKING WITH MULTIPLE CRITERIA 68
TOPIC 3: DEFINING DISTINCT CRITERIA 74
TOPIC 4: EDITING CRITERIA 75

TOPIC 5: DELETING CRITERIA 76

BUILDING PROMPTS 78

TOPIC 1: CREATING PROMPTS 78
TOPIC 2: ADDING PROMPTS TO CRITERIA 81
TOPIC 3: DELETING PROMPTS 82

BUILDING EXPRESSIONS 84

TOPIC 1: DEFINING EXPRESSIONS 84
TOPIC 2: DEFINING AGGREGATE FUNCTIONS 91
TOPIC 3: ADDING EXPRESSIONS TO CRITERIA 95
TOPIC 4: DELETING EXPRESSIONS 96

BUILDING SUBQUERIES 97

TOPIC 1: DEFINING A SUBQUERY 97

BUILDING LIST OF VALUES 103

TOPIC 1: DEFINING LIST OF VALUES 103
TOPIC 2: DELETING LIST OF VALUES 106

UNDERSTANDING JOINS 107

TOPIC 1: CREATING HIERARCHY JOINS 107
TOPIC 2: DELETING HIERARCHY JOINS 108
TOPIC 3: CREATING RELATED RECORD JOINS 108
TOPIC 4: DELETING RELATED RECORD JOINS 112
TOPIC 5: CREATING ANY RECORD JOINS 113

SAVING QUERIES 120

TOPIC 1: SAVING NEW QUERY 121
TOPIC 2: SAVING CHANGES 121
TOPIC 3: SAVING A COPY 121

RUNNING QUERIES 122

TOPIC 1: USING PROMPTS 122
TOPIC 2: RUNNING TO HTML 123
TOPIC 3: DOWNLOADING RESULTS TO EXCEL 123
TOPIC 4: RUNNING TO EXCEL 124

FINANCIALS DESKTOP REFERENCE 126

TOPIC 1: DEFINING FILE TYPES 126
TOPIC 2: PLANNING GUIDE FOR REBUILDING QUERIES 128

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.

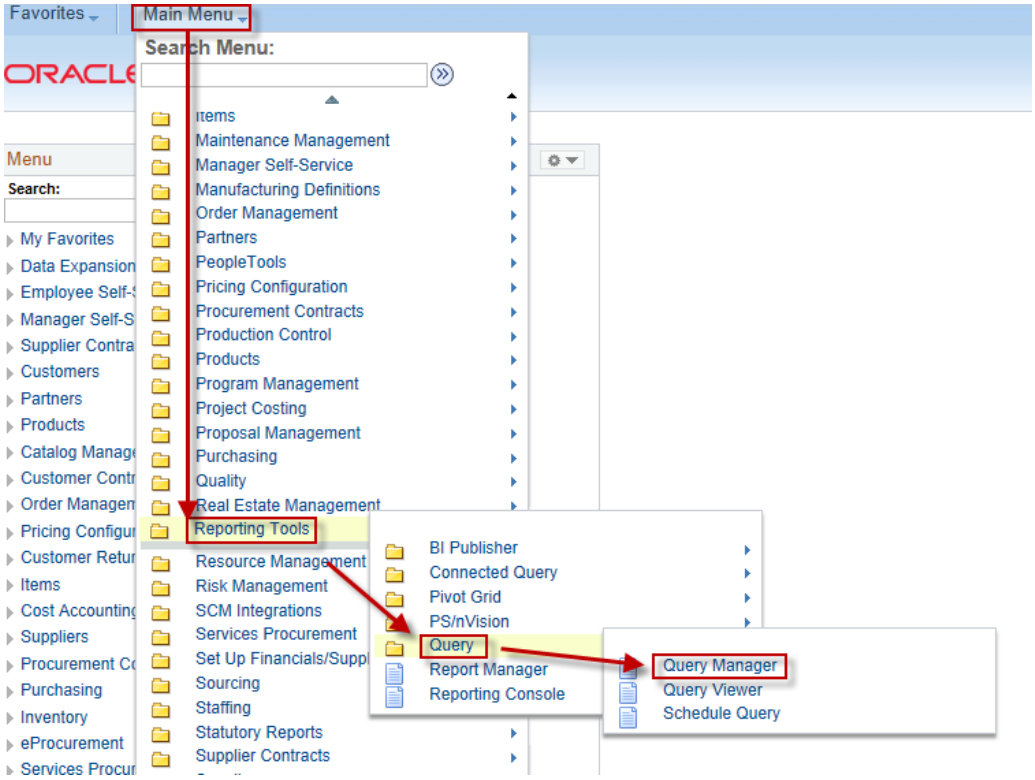

Figure 1

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

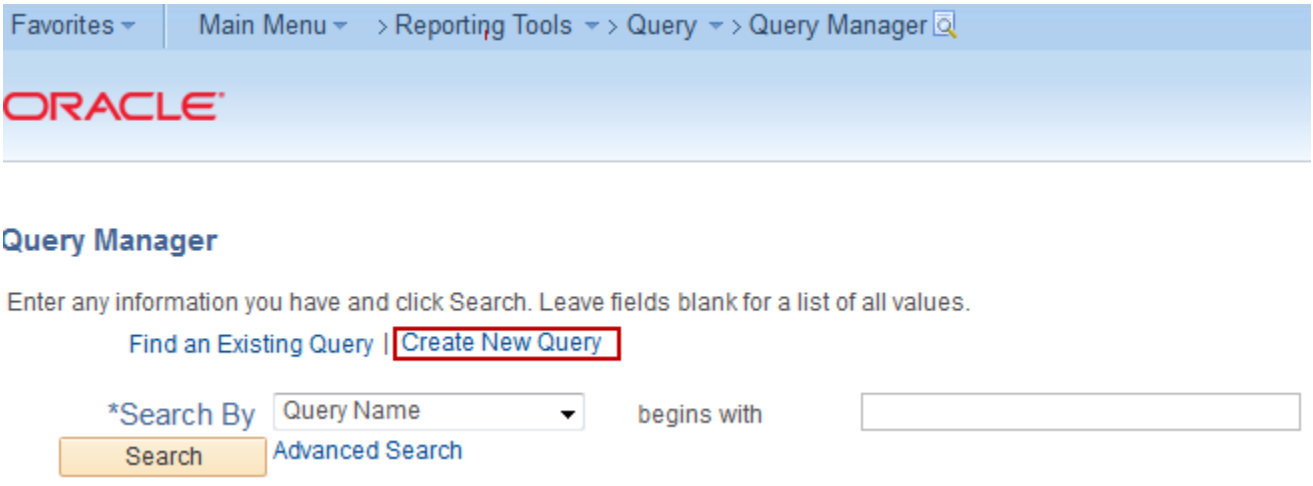

Figure 2

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

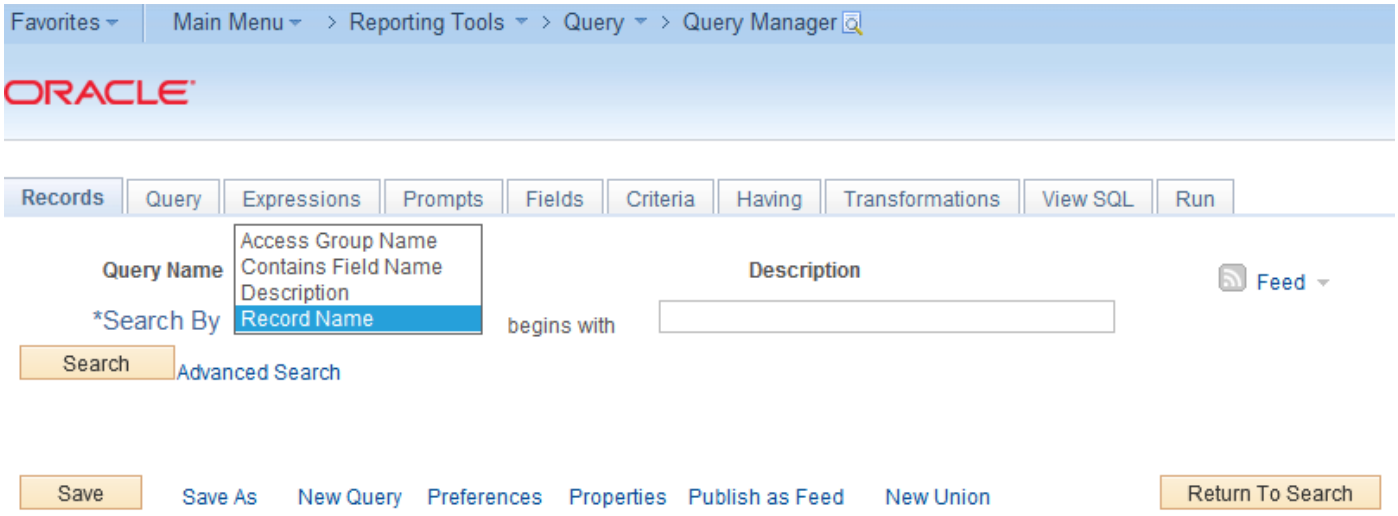

Figure 3

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.

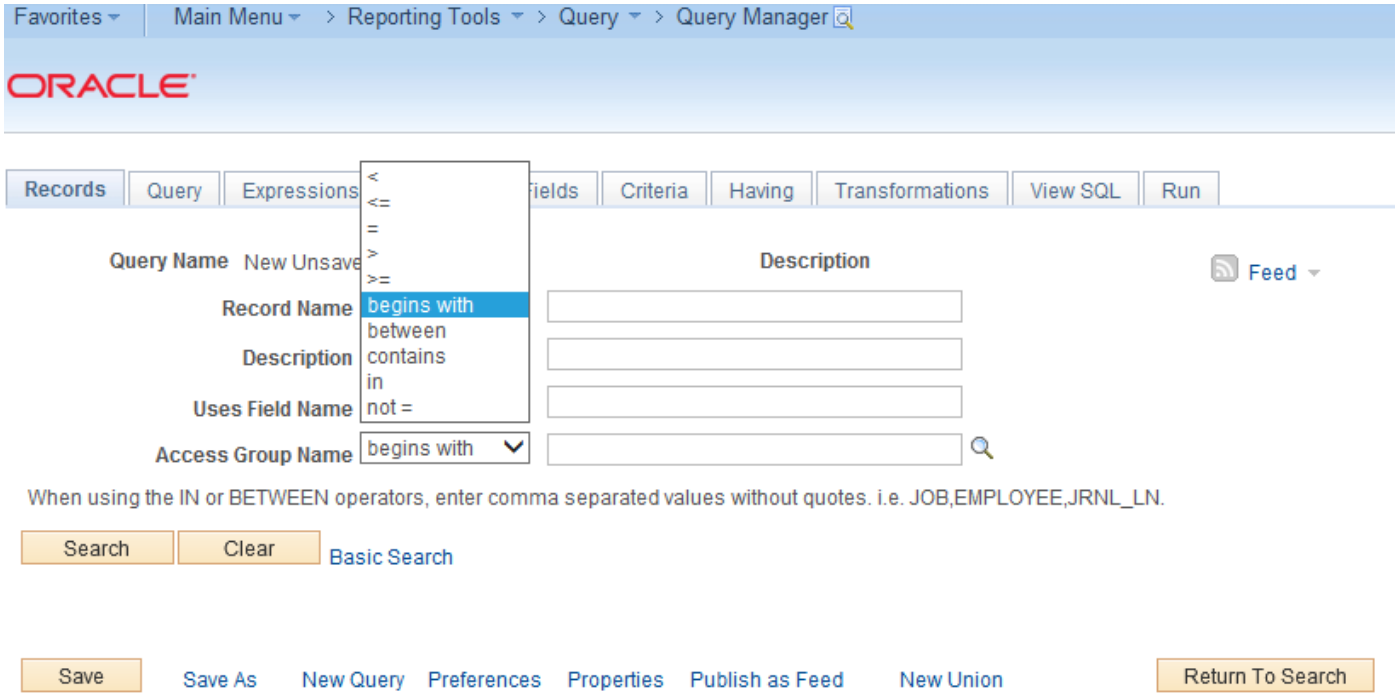

Figure 4

<	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, 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.

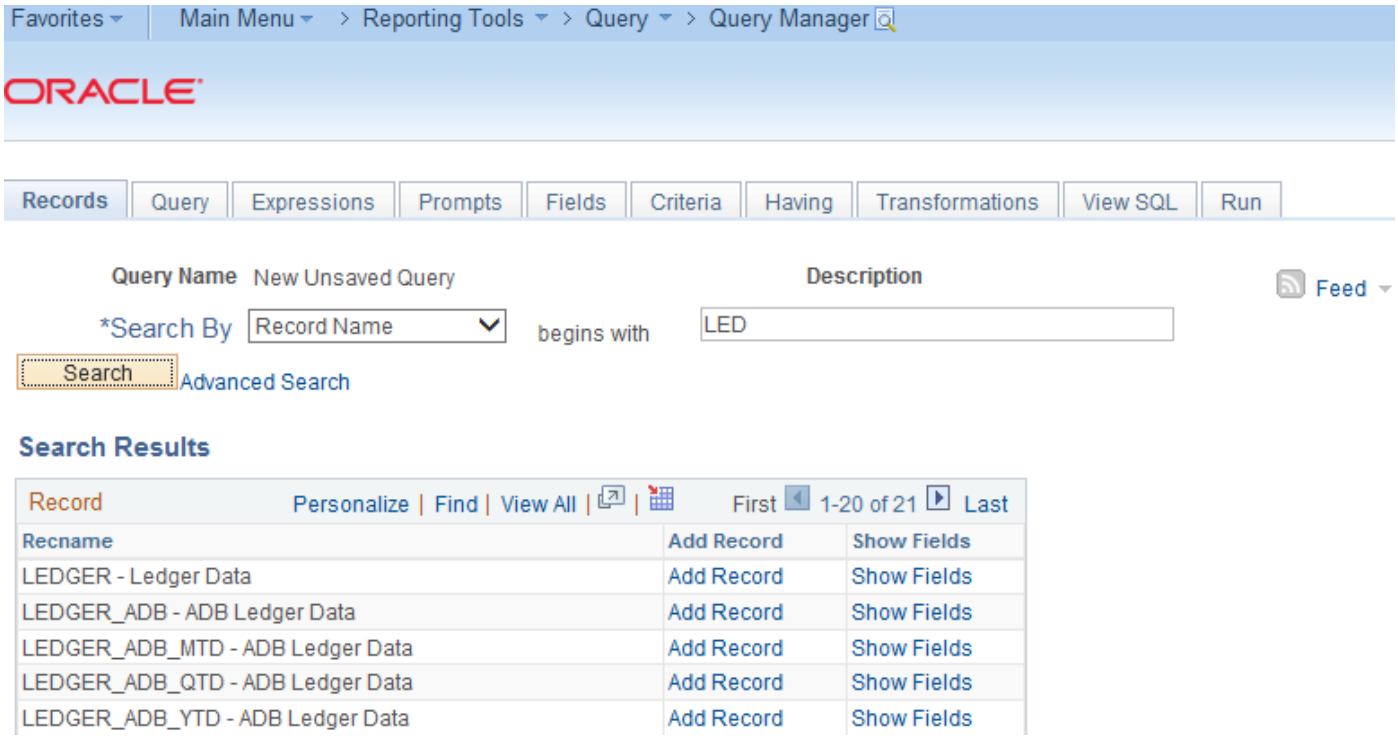

Figure 5

- **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.

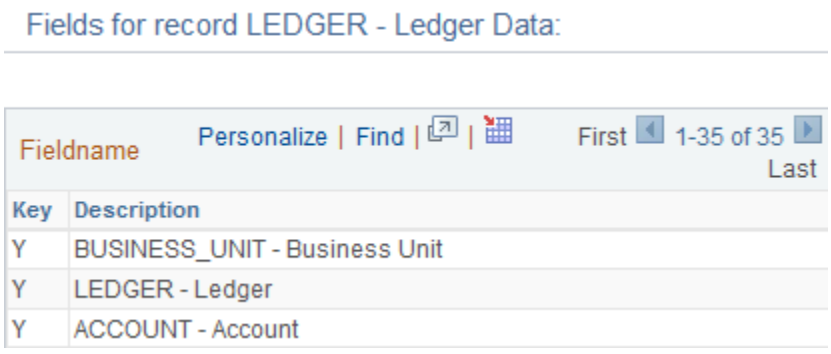

Figure 6

- **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

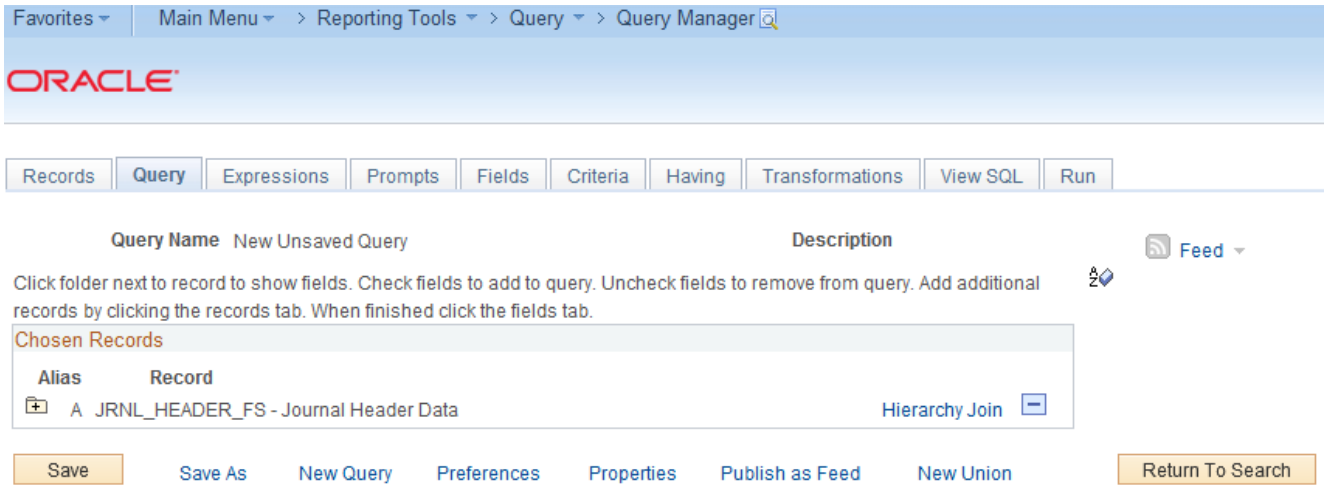

Figure 7

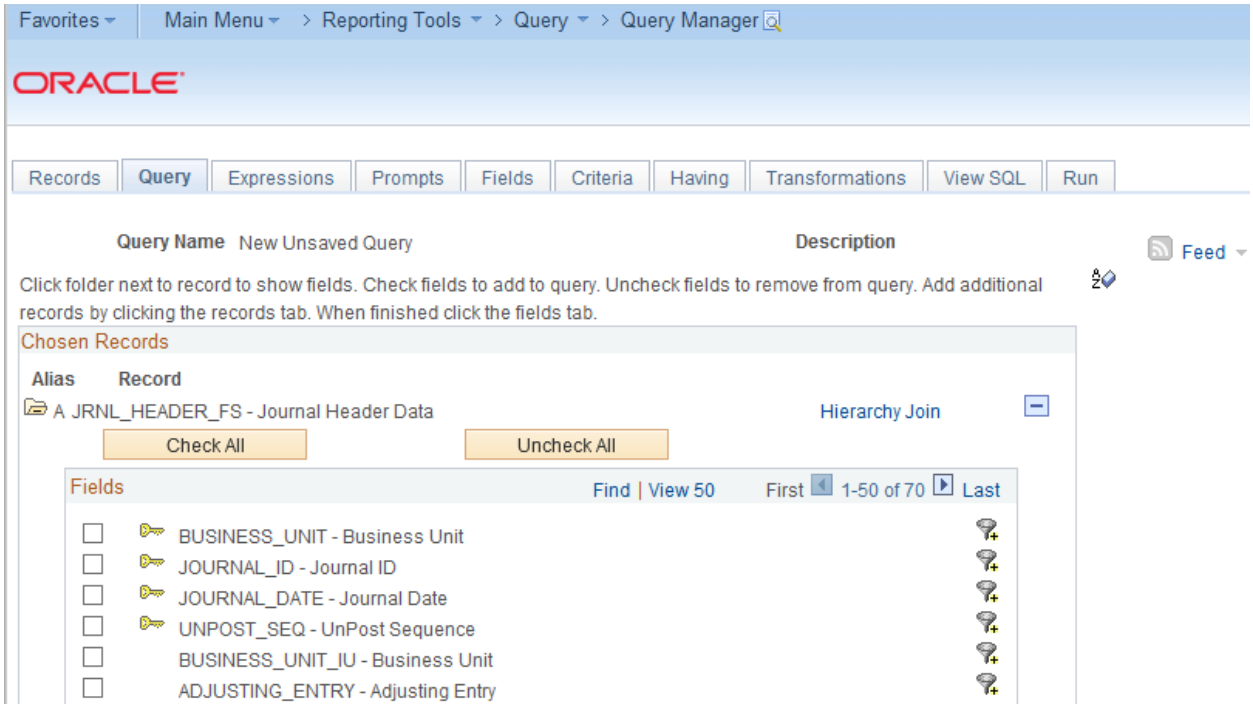

Figure 8

- **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

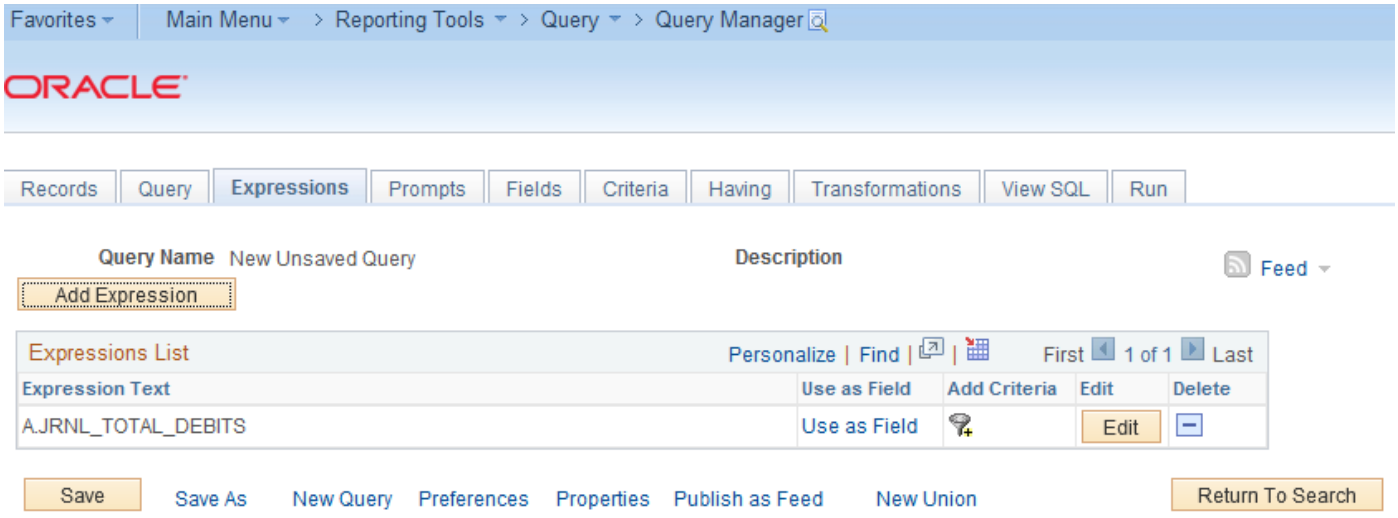

Figure 9

- 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.

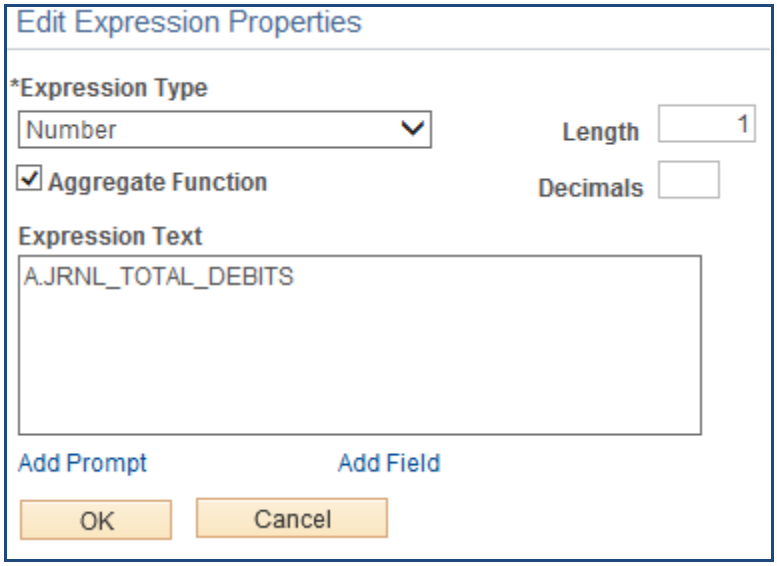

Figure 10

- **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

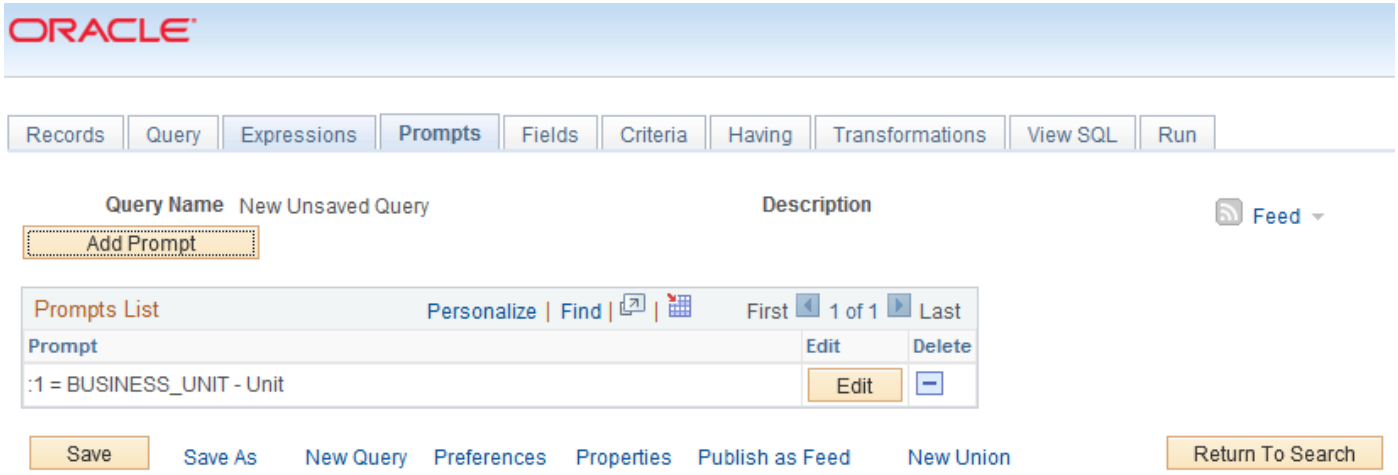

Figure 11

- 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.

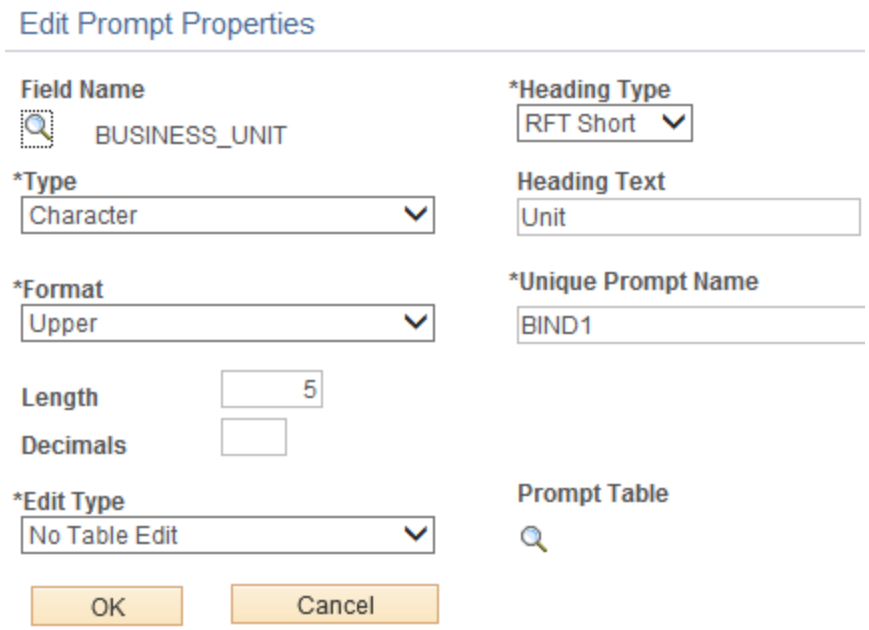

Figure 12

- **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

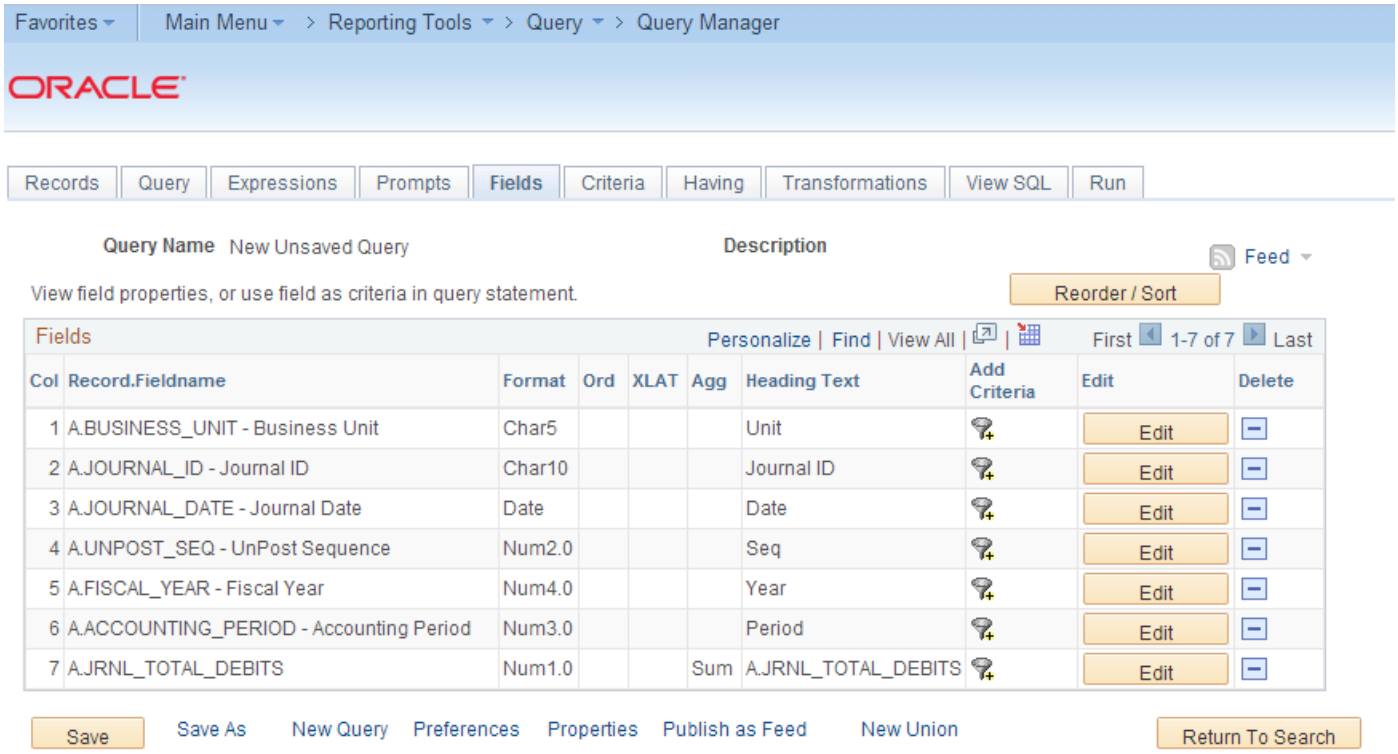

Figure 13

- **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.

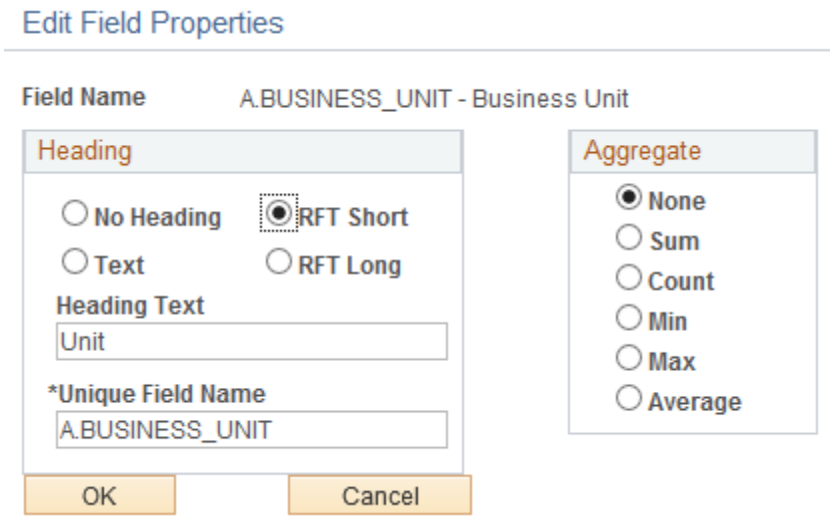

Figure 14

- **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.

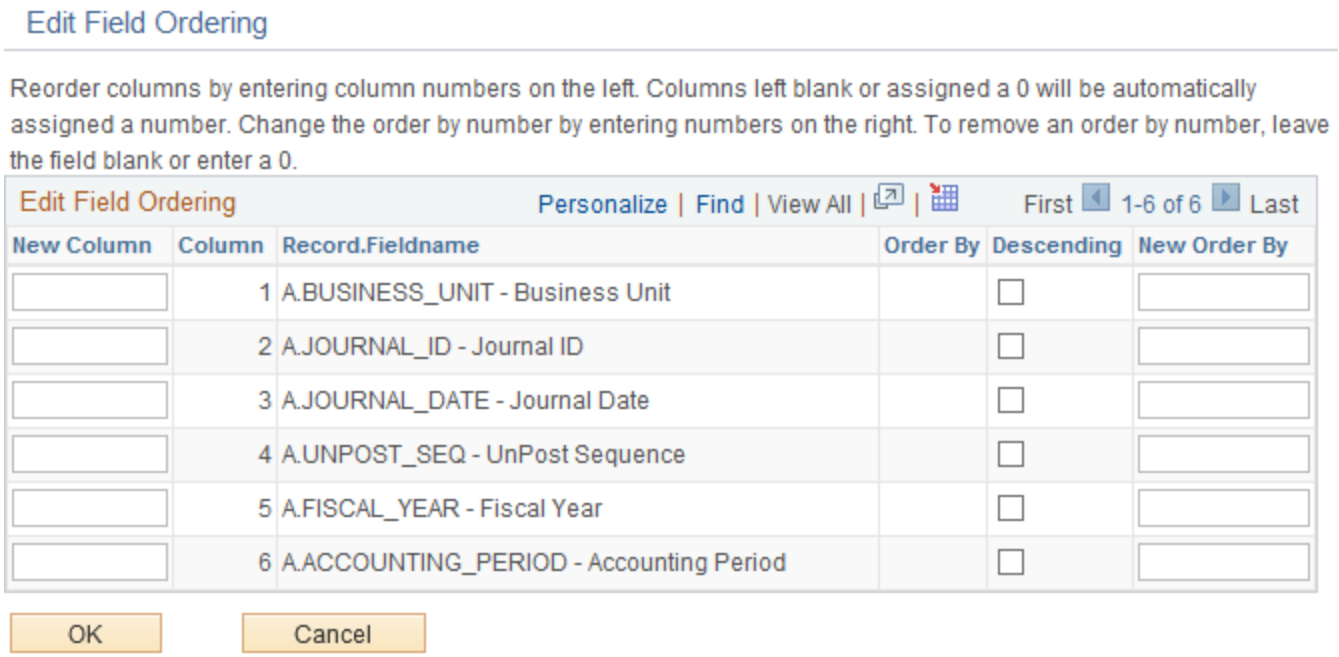

Figure 15

- **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

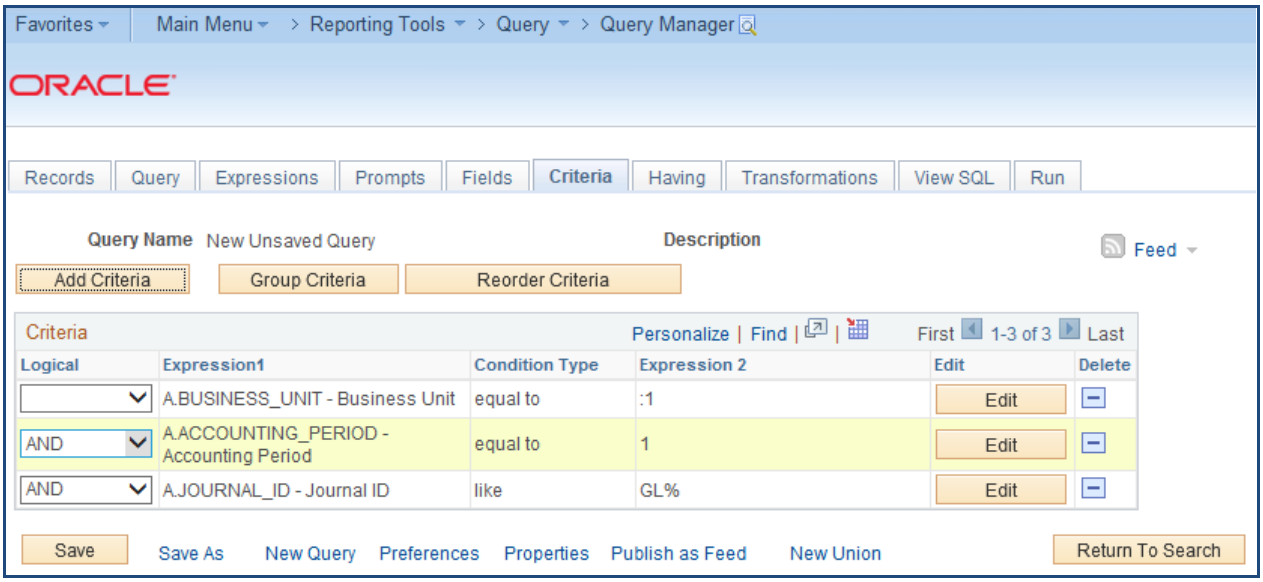

Figure 16

- **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.

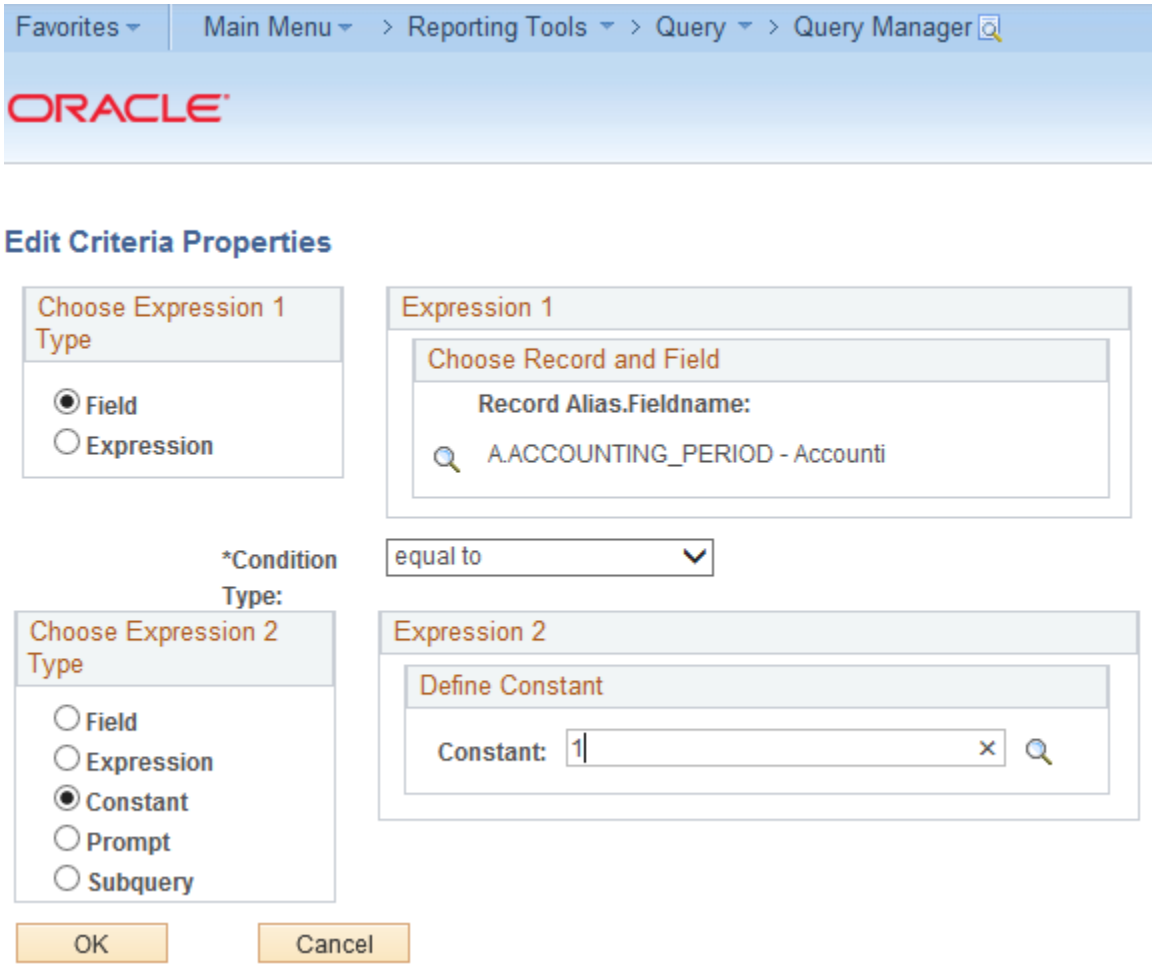

Figure 17

- **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.

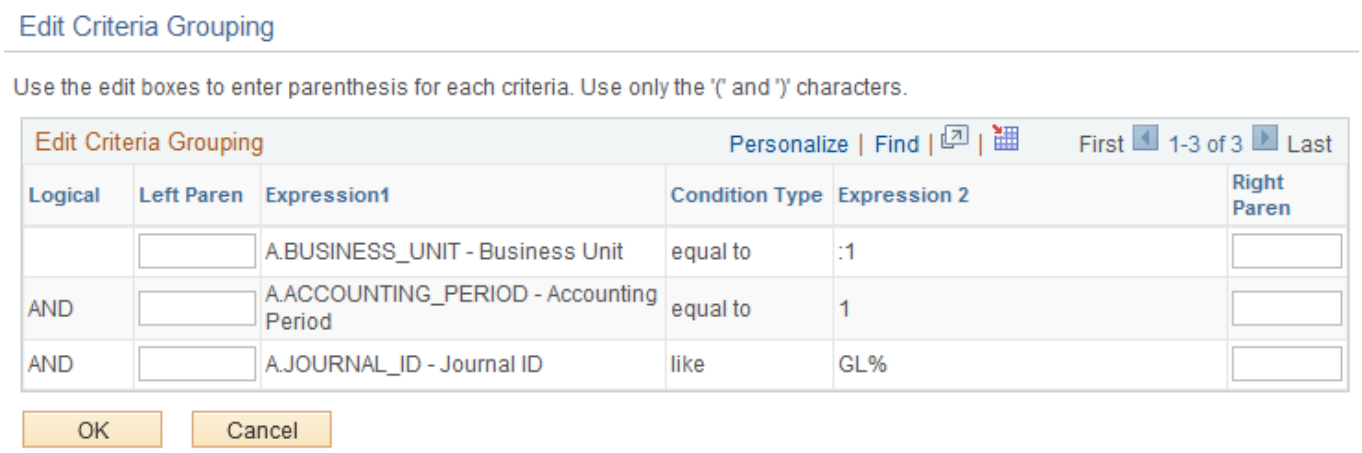

Figure 18

- **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.

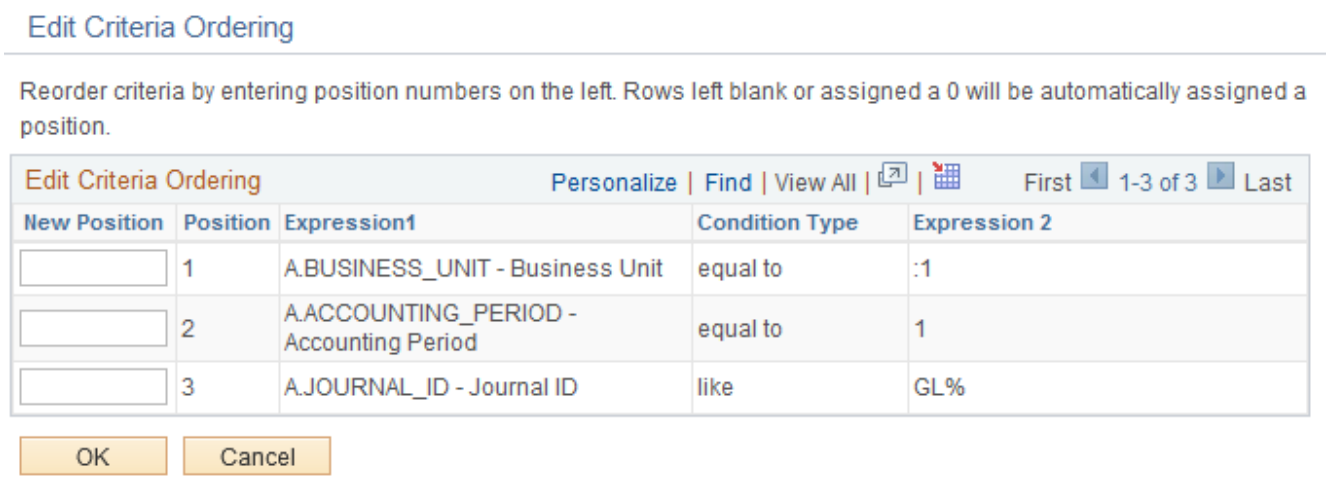

Figure 19

- **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

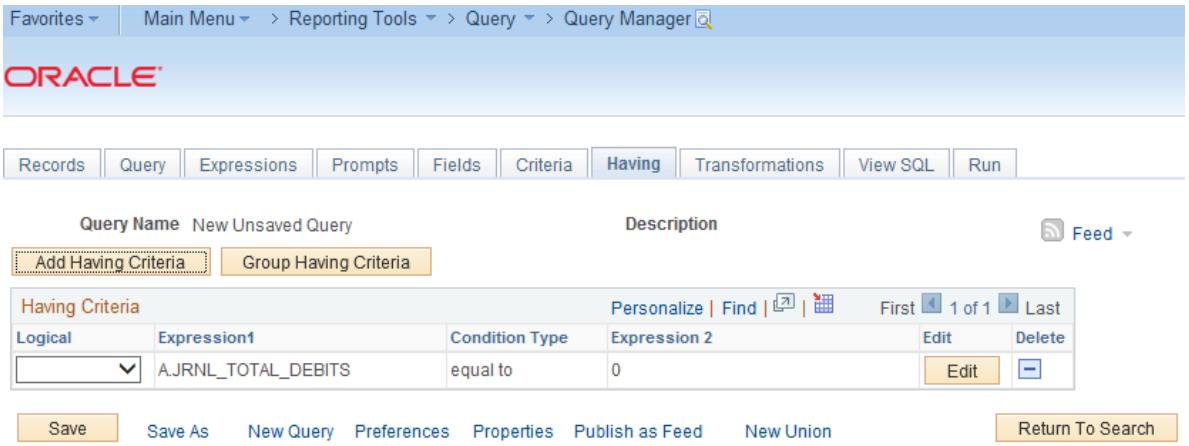

Figure 20

- **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.