Contents

PeopleSoft Query Overview

PeopleSoft Query (Query) is an end-user reporting tool that allows users to extract information from SFS easily and efficiently. Queries can be as simple or as complex as needed; and can be one-time queries or saved queries used repeatedly. This manual walks through the steps of creating a query using the web query tool, and also discusses some advanced query topics that aid in creating powerful queries.

To use Query efficiently, you need a basic understanding of the data (that is, in what record is the data stored) the query will be based upon, and relationships to other records within the database. It is fairly simple to create a query, but it takes time and understanding to create a query and bring back accurate data.

Query has several different ways to do the same task, this manual shows one way. You will likely find different ways to do many items described in this manual. Use the method that works best for you.

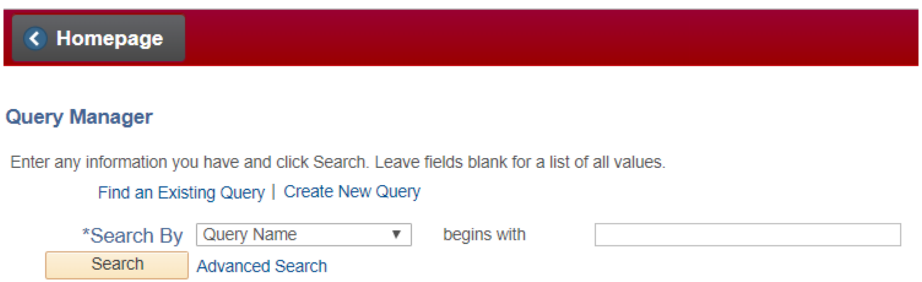
Before getting started with Query, remember the following:

- **Use a single mouse click** when working with Query. There is no need to double click on fields or tabs.
- **Do not use the back button** on the browser when navigating through SFS.
- If the system is processing, **there is not a way for you to stop the processing**. Pressing the stop button on the browser or clicking on another tab will likely cause the system to not respond. You will lose any unsaved data.
- PeopleSoft uses the terms “record” and “table” interchangeably. In this manual, the terms will mean the same thing, which is a two-dimensional arrangement of rows and columns that holds data.

- Queries can be either ‘Public’ or ‘Private’. Public queries are available for any user to review, run or alter. Private queries can only be accessed by the owner.

Process Frequency	Used on an ad-hoc basis.
Dependencies	Some knowledge of SFS records and data.
Assumptions	N/A
Responsible Parties	N/A
Alternate Scenarios	N/A

Process Detail



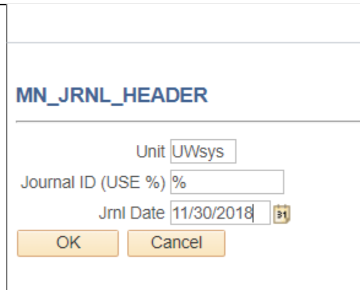
I. Running the Query

Retrieving your data results.

Navigation: Reporting Tools > Query > Query Manager

When running queries, the system looks at all of the rows in the record(s) and returns only those that meet the requirements specified in a query – or all rows if no criteria are specified. A query with no criteria is called a “list query” and contains all of the data in a record.

1. To run a query in Query Manager, **click** Run, the query executes and displays the results. When the query is run, Query Prompts may appear if criteria was defined in the query:



to use Prompt values that require user input. Query prompts may require only a single value such as a date, or may require the user to enter multiple values. The information input by the user completes the query – or the question – being "applied" to the data.

Remember, the query results (dataset) are static. If the data in the database changes 5 minutes after the query is run, the query results will remain the same, unless you rerun the query.

Depending upon the data in the system, or the information supplied in the limits or run-time prompts, the dataset may be empty. Empty datasets may also be a result of security restrictions. If you do not have access to view data within the query tool, the dataset may display as empty – even if data is present.

When data meets the requirements of the query it will be included in the results. The upper right hand corner of the dataset will display the number of records returned. Unlike other PeopleSoft search results, Query can display more than 300 rows as a result of a "fetch" on the database.

View All | Rerun Query | Download to Excel | Download to XML   First 1-100 of 206 Last

	Unit	Journal ID	Date	Seq	Year	Period	Ledger Grp	Source	Status	Lines
1	UWMSN	ALO0000001	10/31/2018	0	2019	4	ACTUALS	ALO	P	128
2	UWMSN	ALO0000002	10/31/2018	0	2019	4	ACTUALS	ALO	P	2748
3	UWMSN	ALO0000003	10/31/2018	0	2019	4	ACTUALS	ALO	P	16
4	UWMSN	ALO0000004	10/31/2018	0	2019	4	ACTUALS	ALO	P	11916
5	UWMSN	CA00495889	10/31/2018	0	2019	4	ACTUALS	CA	P	1610
6	UWMSN	FX00000014	10/31/2018	0	2019	4	ACTUALS	ALO	P	24
7	UWMSN	ALO0000005	10/31/2018	0	2019	4	ACTUALS	ALO	P	24
8	UWMSN	ALO0000006	10/31/2018	0	2019	4	ACTUALS	ALO	P	4
9	UWMSN	ALO0000007	10/31/2018	0	2019	4	ACTUALS	ALO	P	4
10	UWMSN	ALO0000008	10/31/2018	0	2019	4	ACTUALS	ALO	P	4
11	UWMSN	ALO0000009	10/31/2018	0	2019	4	ACTUALS	ALO	P	4
12	UWMSN	AP00495652	10/31/2018	0	2019	4	ACTUALS	APA	P	8
13	UWMSN	AP00495653	10/31/2018	0	2019	4	ACTUALS	APX	P	4
14	UWMSN	EXACC95655	10/31/2018	0	2019	4	ACTUALS	EX	P	2122

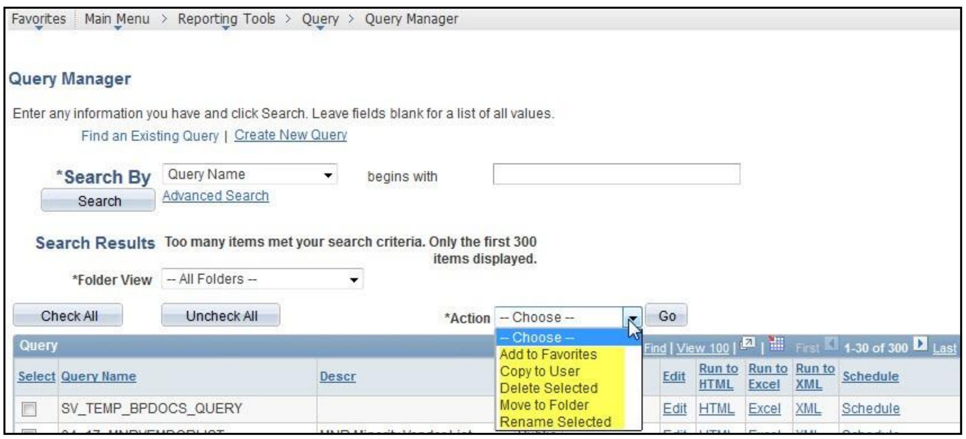
2. You may want to execute a query again because you want to see a different Business Unit or different Period, etc. **Click** on the **Rerun Query** hyperlink. The default view is to show the first 100 rows. **Press** the *View All* hyperlink located on the left-hand side to view all the data at once, or use the arrows to navigate the results.
3. You can also download the query results to Excel or XML by **clicking** the *Download to Excel* or *Download to XML* hyperlink for that function. You will be prompted to either 'Open'

or ‘Save’ the query dataset.

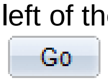
NOTE: From Oracle Support: “Since the release of MS Office 2007, Excel 2007, 2010, and 2013 can support around 1 Million rows. However, this does not change the limitation on the number of rows that can be downloaded into Excel while running queries from PeopleSoft Query Tool. The Query tool can only handle roughly 64k rows. You can also use nVision layout to run any query and Excel will support up 1,000,000 rows.

Please remember….. having so many rows to download into Excel it will use large amounts of resources from the application server, web server and database server and can cause performance issues.

II. Query Actions



Navigation: Reporting Tools > Query > Query Manager

1. There are different query actions available for queries in the ***Action*** menu on the main search screen of Query Manager. To use these actions, simply **click** the checkbox to the left of the query name, **select** a value from the Action dropdown menu, and **click** 

. You will be prompted for additional information to complete any desired action(s).

III. Planning a New Query

When creating a new query, planning ahead can save time. It may help to determine the following:

- Start with the “results” or output you seek.
- What records are needed to give your results?
- Which fields should be included in the query?
- How should the data be limited?
- Should any amounts by summarized?

Queries that are created “on the fly” with no planning may give incorrect data due to PeopleSoft’s complex record structure. Poorly built queries can cause the system to slow down for all users by using excessive database resources.

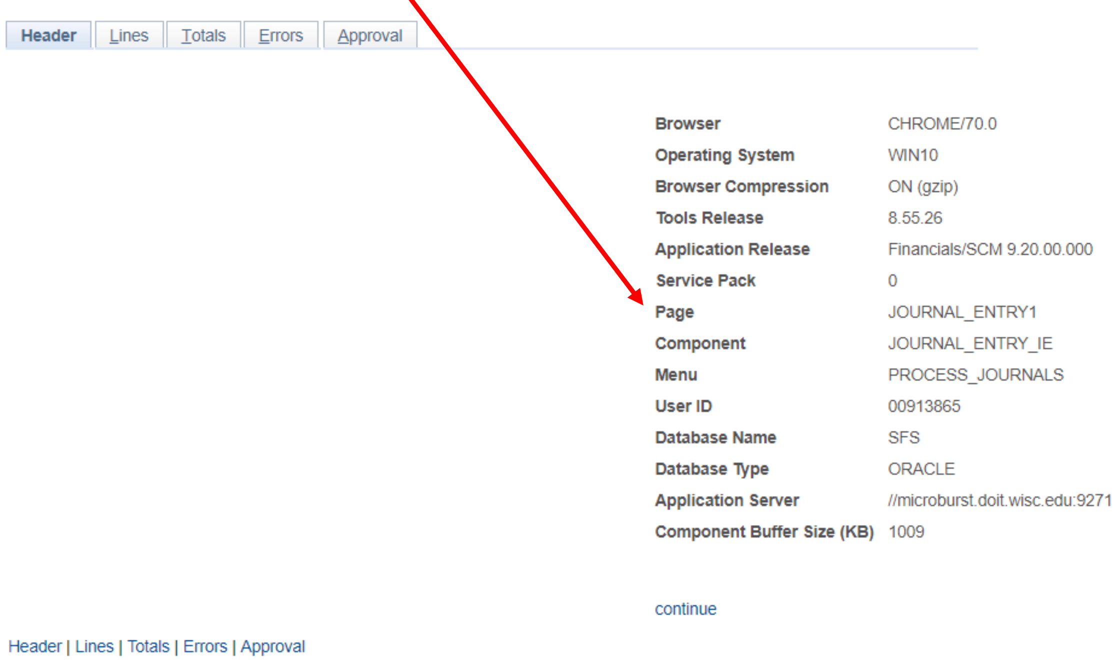
IV. How to Find Out Which Record(s) to Use

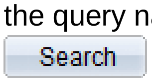
As most users are aware, familiarity with the pages in SFS is not the same as knowing the record structures which store the data. When creating a query, you must know the records, as that is what you base the query on. So, how do you determine the records? There is a query to find this information, all you need to know is the page name. The query name is **UW_89_PAGE_TABLES.**

This query will prompt you for a page name and will then display the fields and records for the page. It will not display work tables or temporary tables.

Steps to determine Page/Record names:

1. **Navigate** to the page where the data you wish to query is contained
2. **Press** ALT+J to see the page name:



3. **Navigate** to Query Viewer or Query Manager
4. **Enter** the query name ‘UW_89_PAGE_TABLES’
5. **Click** 

6. **Run** it to Excel, HTML or XML.
7. A prompt will come up for the Page Name. **Enter** it or lookup the value

Page Name = JOURNAL_ENTRY1

View All | Rerun Query | Download to Excel | Download to XML   First 1-26 of 26 Last

	Label Text	Record	Field Name
1			
2			
3			
4	Edit Table	DERIVED	EDITTABLE
5	Auto Generate Lines	JRNL_HEADER	AUTO_GEN_LINES
6	Journal Class	JRNL_HEADER	JOURNAL_CLASS
7	Adjustment Type	JRNL_HEADER	GL_ADJUST_TYPE
8	Transaction Code	JRNL_HEADER	IU_TRAN_CD
9	Agency Location Code	JRNL_HEADER	ALC
10	SJE Type	JRNL_HEADER	SJE_TYPE
11	Entered On	JRNL_HEADER	JRNL_CREATE_DTTM
12	Last Updated On	JRNL_HEADER	DTTM_STAMP_SEC
13	Fiscal Year	JRNL_HEADER	FISCAL_YEAR
14	Ledger Group	JRNL_HEADER	LEDGER_GROUP
15	Adjusting Entry	JRNL_HEADER	ADJUSTING_ENTRY
16	Ledger	JRNL_HEADER	LEDGER
17	Source	JRNL_HEADER	SOURCE
18	Period	JRNL_HEADER	ACCOUNTING_PERIOD
19	Reference Number	JRNL_HEADER	TRANS_REF_NUM
20	ADB Date	JRNL_HEADER	ADB_DATE
21	Entered By	JRNL_HEADER	OPRID
22	Description	OPRID_VW	OPRDEFNDESC
23	Long Description	JRNL_HEADER	DESCR254
24	CTA	JRNL_HEADER	GL_CTA
25	Date Code Adjustment	JRNL_HEADER	DATE_CODE_JRNL
26		JRNL_HEADER	

8. This will show you the record and field that displays on the page, so keep this information handy when you start building your query.

V. Building a New Query

Navigation: Reporting Tools > Query > Query Manager

Query Manager

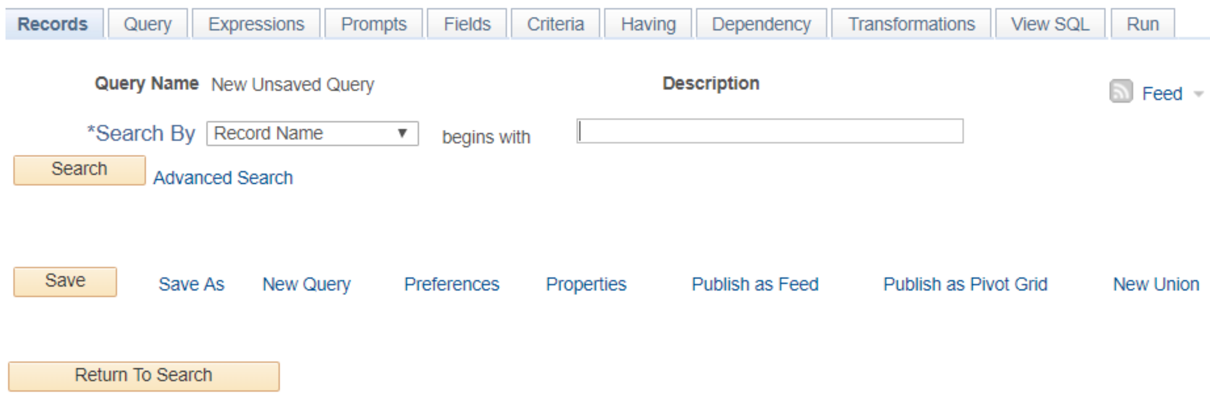
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Query | Create New Query

*Search By Query Name ▼ begins with

Search Advanced Search

1. Query Manager defaults to the Find an Existing Query search screen. To create a new query, **click** the *Create New Query* hyperlink. You will be taken to the *Find an Existing Record* screen:



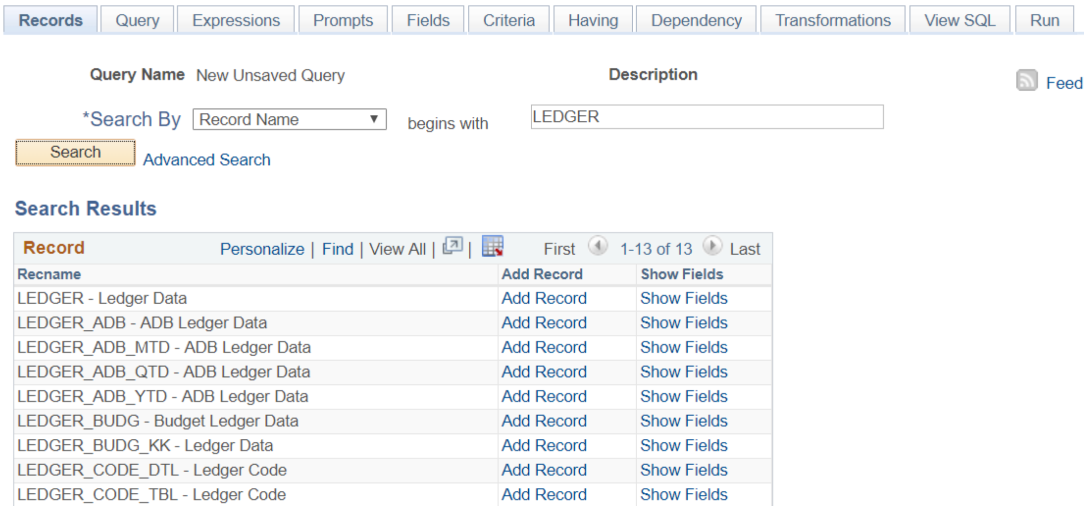
2. The query tool shows several query tabs along the top of the window which are used to build a new query. The same tabs appear once an existing query has been opened for editing. The tabs perform the following functions:

   a. Records -- Select the records to use in the query.
   b. Query -- Select fields to add to the query from the records selected.
   c. Expressions -- Create an expression to use within the query.
   d. Prompts -- Create run-time prompts for the query.
   e. Fields -- Change the heading name, sort order, or create an aggregate field.
   f. Criteria -- Limit the results by creating criteria to get back expected information.
   g. Having -- Limit the results by creating criteria on the aggregate fields.
   h. Dependency – DO NOT USE - the Dependency page (QRY_PRUNING) is used to specify whether a record can be pruned during the SQL pruning process in Composite Query. This page also enables you to specify the details of a record or field, depending on other records or fields.
   i. Transformations – DO NOT USE – used only if you have PeopleSoft Pure Internet Architecture access from a browser… NA for this environment.
   j. View SQL -- Review the query SQL.
   k. Run -- View the query results.

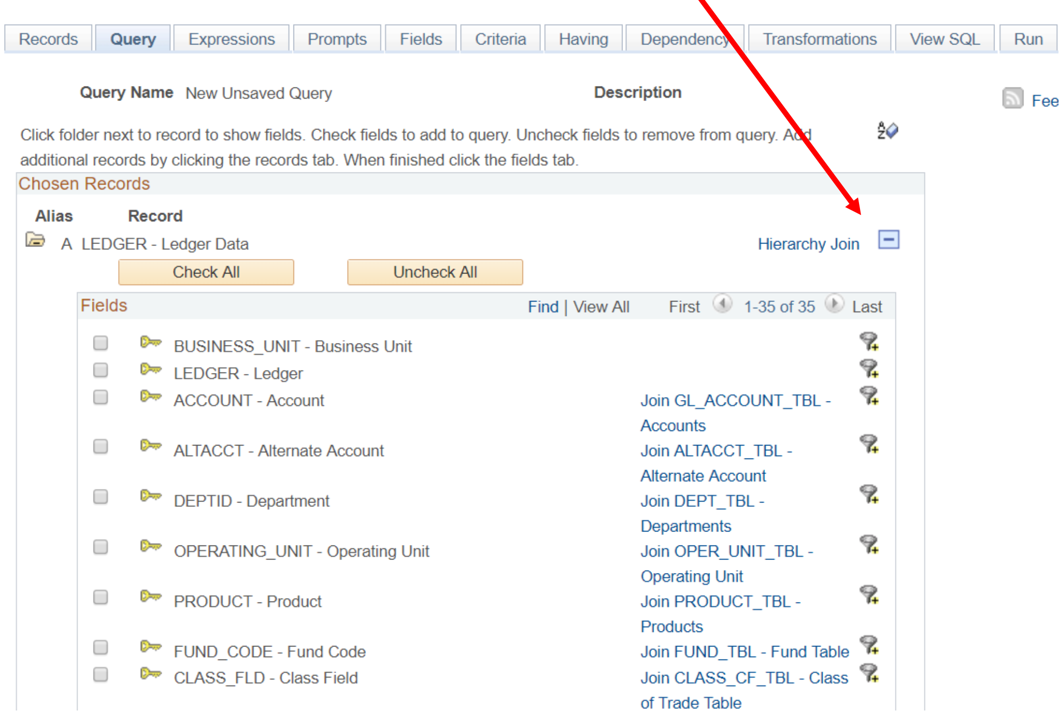
3. Select the records that contain the information for the query. In this example, the query is based on a single record.

   NOTE: When you have multiple records in a query, the records must be related (joined) in a rational manner, or else your results will not be accurate. Typically, Query will join records based on "like" key fields. Keys fields are "High" level fields that make each line unique, which may or may not be the proper joins for the query. (See the **RPT.1.02.03 - Intermediate PeopleSoft Query** business process document for more information about joining records.)

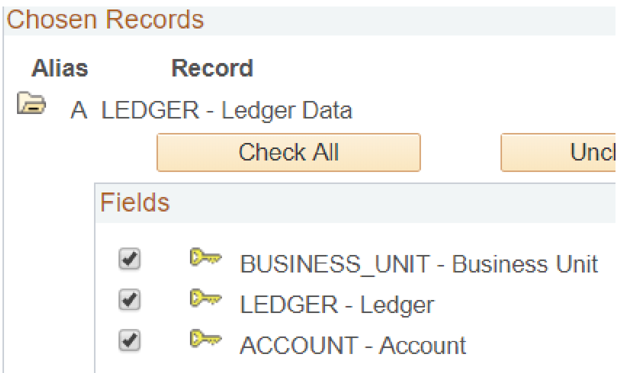
   a. The example below is based on the LEDGER record. Enter 'LEDGER' in the *Search Box* and click **SEARCH** to find the record.

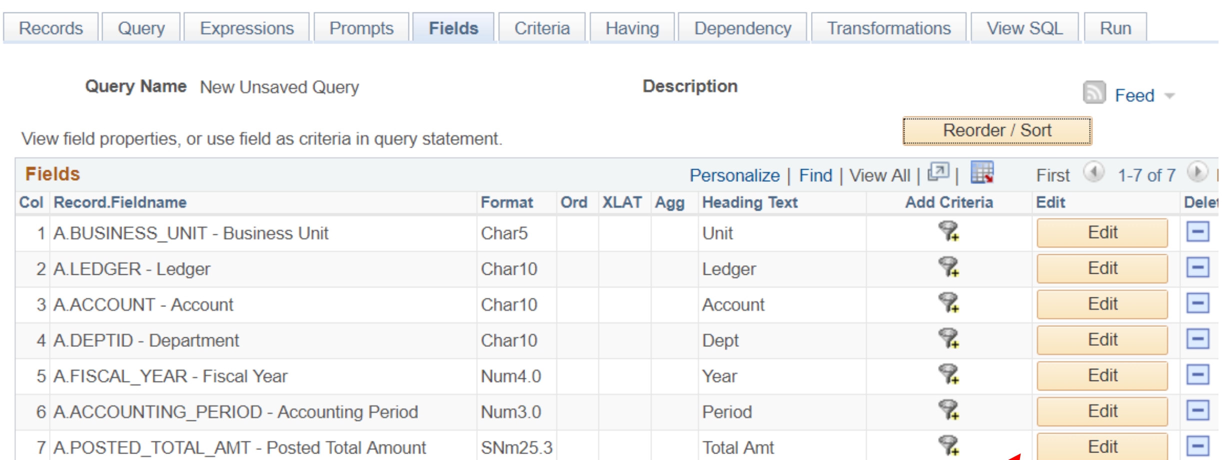


b. Once you locate the correct record, **click** the *Add Record* hyperlink. The screen will change from Records to Query. The record has been added to the query, and a list of fields contained in the chosen record is now seen. To remove a record from your query, **click** to the right of the record name.

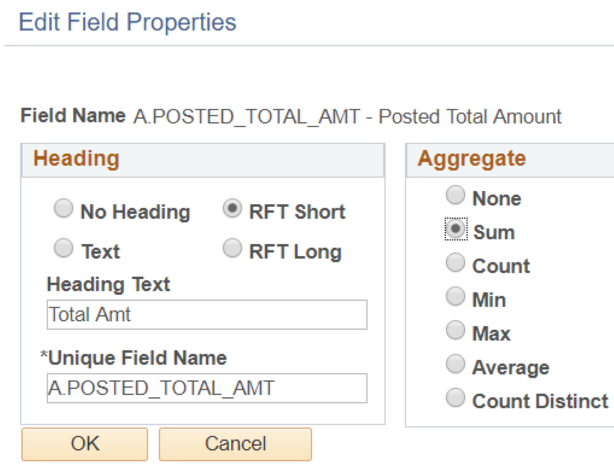


4. Query - To add fields for the query, **check** the corresponding box to the left of the field name. To add every field in the record to the query, **click** Check All. To remove all fields, **click** Uncheck All. To eliminate a single field, simply **uncheck** the corresponding box to the left of the field name. You will now be able to see the fields you have added on Fields.





5. Fields - On the Fields tab, each checked field displays. On the Fields tab you can change the field to an aggregate field, change the heading text, limit the results or change the sort and column order. Foe example, this query can show the *Posted Total Amount* field aggregated, so **click** Edit to the far right of the POSTED_TOTAL_AMT field. You will be taken to the Edit Field Properties screen:

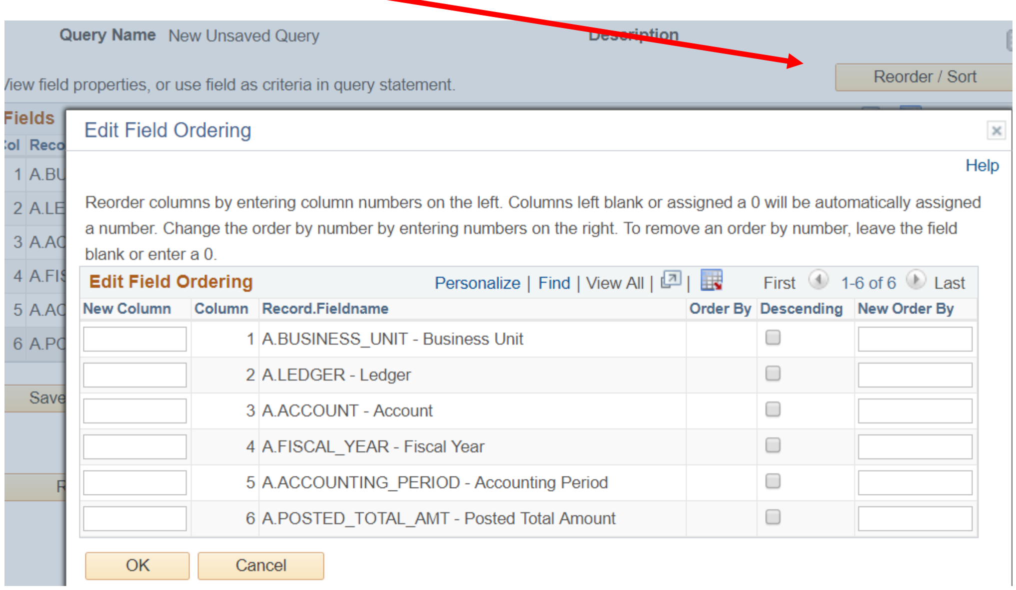


a. **Change** the *Aggregate* radio button from 'None' to 'Sum'.

b. There are several options on this page that are useful. The **Heading** section controls the heading display text. Each field has a system generated short name and long name. To select the default short name, **click** the 'RFT Short' radio button. To select the default long name, **click** the 'RFT Long' radio button. If you wish to modify the heading to something else, you can **click** the 'Text' radio button and **type** your heading directly in the *Heading Text* box. Be sure to change the radio button to 'Text' first, or your changes may not be saved.

c. **Click** OK when finished. You will be taken back to Fields.

d. Click on **Reorder/Sort**



e. In the *New Column* area, **fill in** the new order of the columns (1 being the first column, 2 being the second and so on…) to reorder the columns as you like. A number is not needed in every field. This will change the left to right placement of the fields/columns in the final query output.

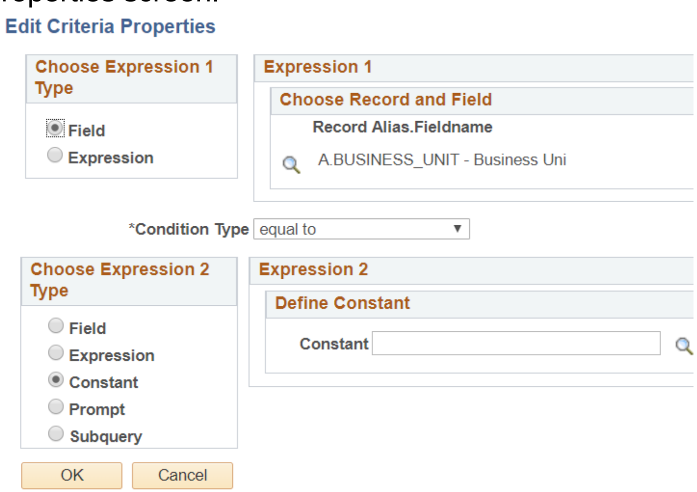
f. **Fill in** the *New Order By* area (1 being the first column to be sorted, 2 being the second and so on…) to sort any columns in ascending order. A number is not needed in every field. Ascending order is the default order. Ascending order sorts alpha characters from A-Z and numeric characters from smallest to largest values. Blanks or null values are sorted first.

g. If you wish to have the column sorted in descending order, **click** the checkbox for that column under the *Descending* area. A number is not needed in every field. Descending order sorts alpha characters from Z-A and numeric characters from largest to smallest values. Blanks or null values are sorted last.

h. Once you have finished sorting and ordering, **click** OK. You will be taken back to Fields.

6. - To narrow your query search, you can add criteria to your query. This can be done from Fields (#5) or from Criteria (#6).

a. From Fields, **click** icon under the *Add Criteria* area for the field you wish to narrow. (For this example, *Business Unit*) You will be taken to the Edit Criteria Properties screen.



i. **Select** your *Condition Type* from the dropdown menu. In this instance, use *Condition Type* of ‘equal to’.

ii. Under the *Choose Expression 2 Type*, **accept** the default ‘Constant’

iii. Under the Expression 2 section, in *the Define Constant* box**, enter** a specific value or **select** a value from the lookup for the *Constant* field. For an ad-hoc query you will most likely use a constant value. (i.e. 'UWMSN', 'UWEXT') You can also create a prompt to ask the user to select a value if the query will be used more than once and saved.

iv. In this example, the *Business Unit* is being narrowed to 'UWMSN'. The *Ledger* is being narrowed to 'FIN_RPT', and the *Account* is being narrowed to a value greater than '6000'. To do this, we will need to create 3 separate criteria. Once you have **entered** 'UWMSN' as the *Constant* value, **click** OK.

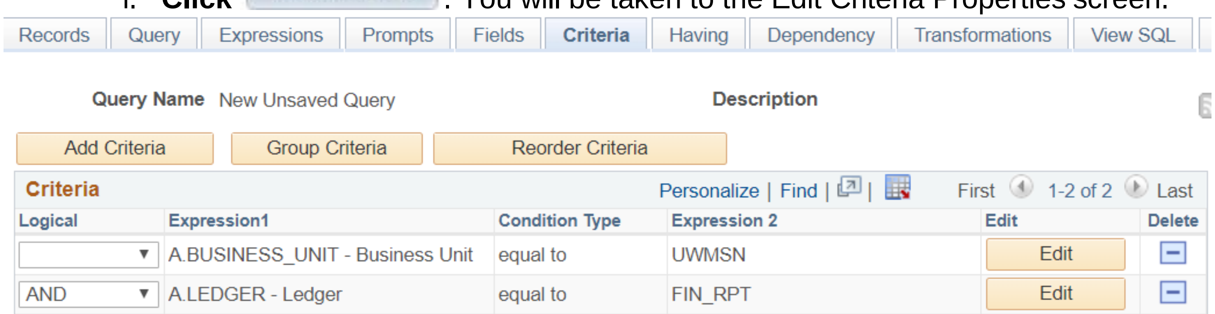
v. In the Ledger field row, **click** . You will be taken to the Edit Criteria Properties screen.

vi. Under the *Expression 2* section, in the *Constant* **enter** 'FIN_RPT'.

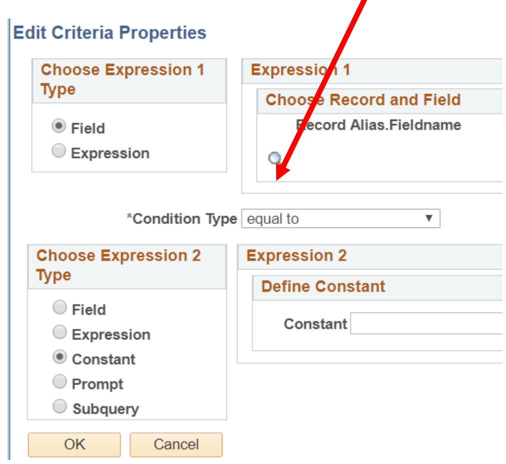
vii. **Click** OK. You will be taken back to Fields.

b. Click Criteria

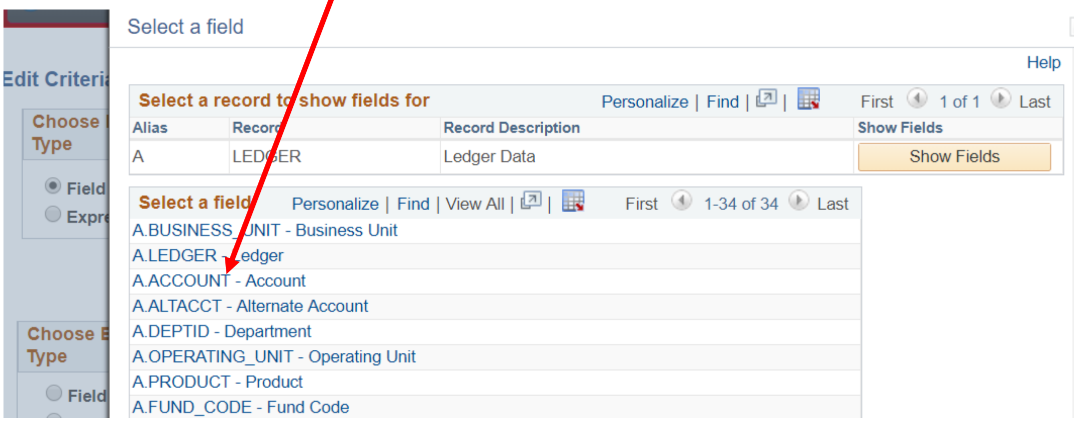
i. **Click** Add Criteria. You will be taken to the Edit Criteria Properties screen.



ii. In the *Expression 1* BOX, **lookup** to find a field in which to add criteria..

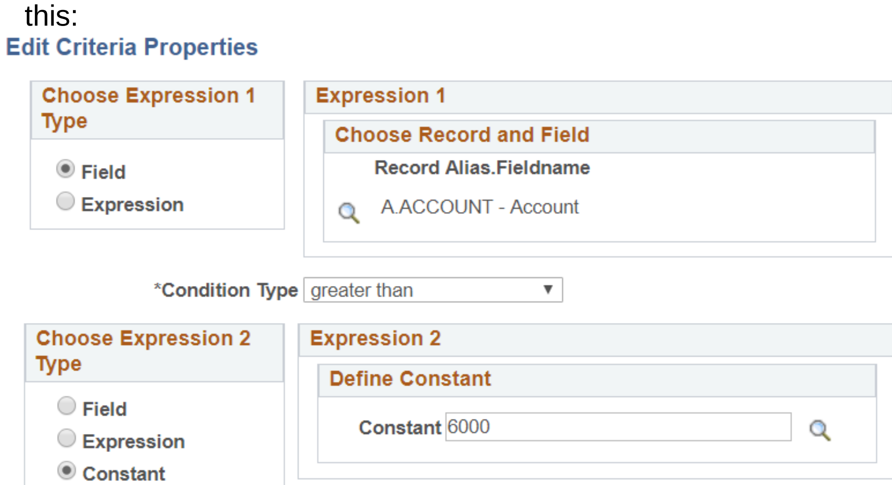


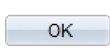
For this example, **click** the *A.ACCOUNT- Account* hyperlink



iii. For this example, the value should be greater than 6000. So, **select** 'greater than' from the dropdown menu in the *Condition Type* selection box.

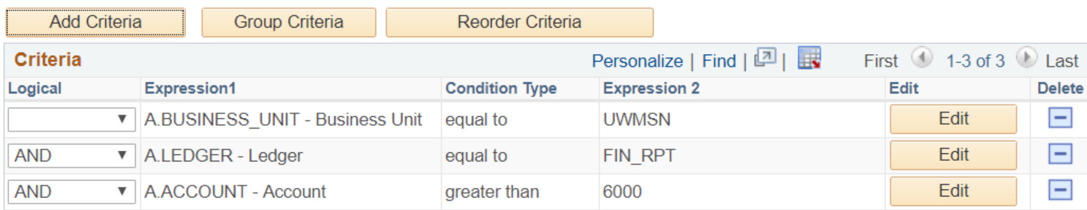
iv. In the *Constant* field for *Expression 2*, **type** '6000'. Your screen should look like this:



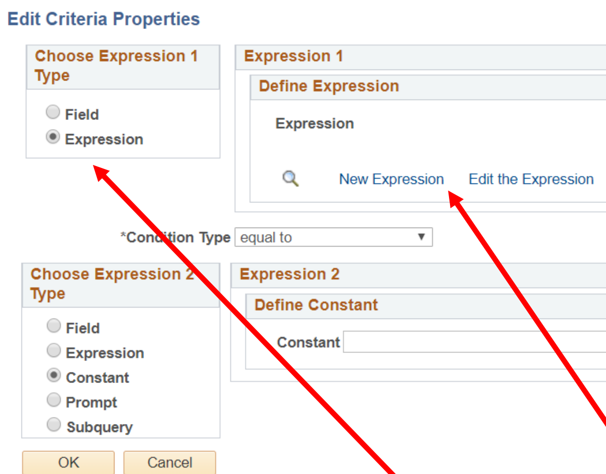
v. **Click** 

. You will be taken back to 

, where you will see the 3 criteria which you added.

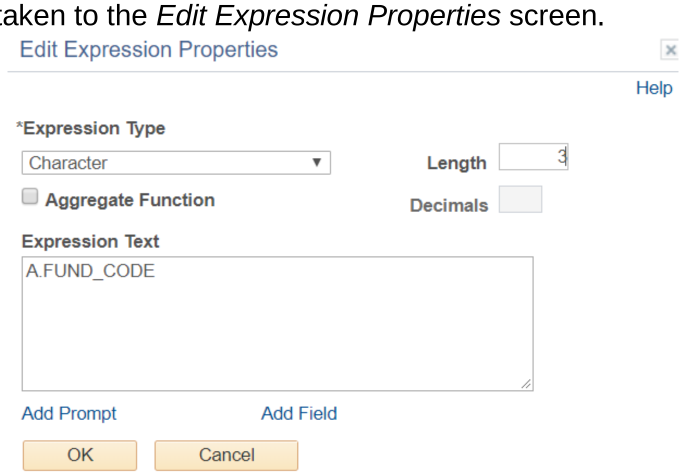


c. If you need to add criteria on fields that are not included in your result set, you can add the criteria using Add Criteria on Criteria. You can also add criteria to your query on any screen where you see the icon.



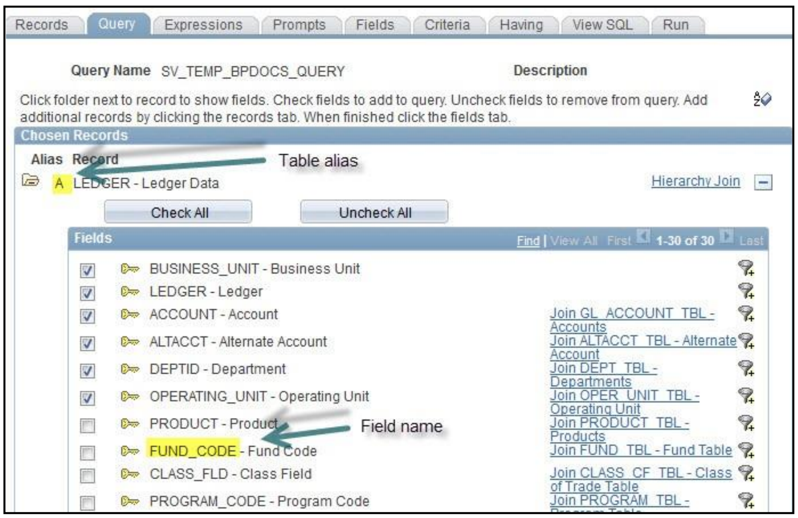
i. In the *Choose Expression 1 Type* box, **select** the *Expression* radio button.

ii. In the *Expression 1* section, **click** the *New Expression* hyperlink. You will be taken to the *Edit Expression Properties* screen.



iii. In the *Expression Text* box, **type** the Table alias.Fieldname value for the field on which you wish to add criteria. OR, click on "Add Field" hyperlink below the Expressions Type box to search for add the Field value. Be sure to update the *Length* to the number of characters for this field value. In this case, the *Fund* field data is 3 characters long.

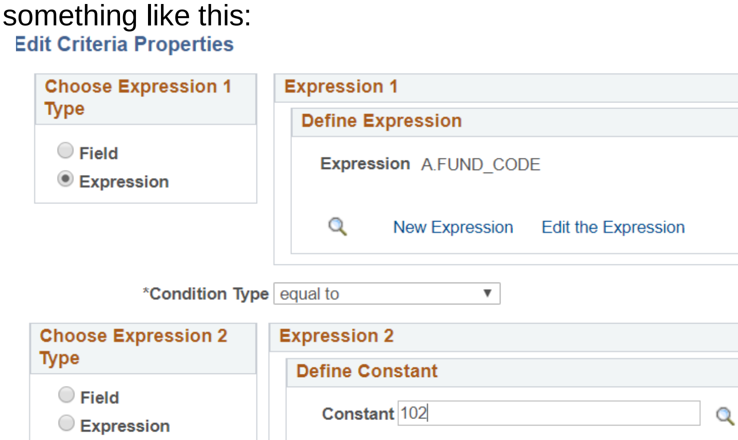
iv. If you do not know the Table alias.Fieldname, it can be found on the Query tab. (See screenshot below)



v. **Click** OK. You will be taken back to the Edit Criteria Properties screen.

vi. **Enter** your *Expression 2* criteria *Constant* value

vii. **Click** OK when you are finished. Your finished criteria should look something like this:

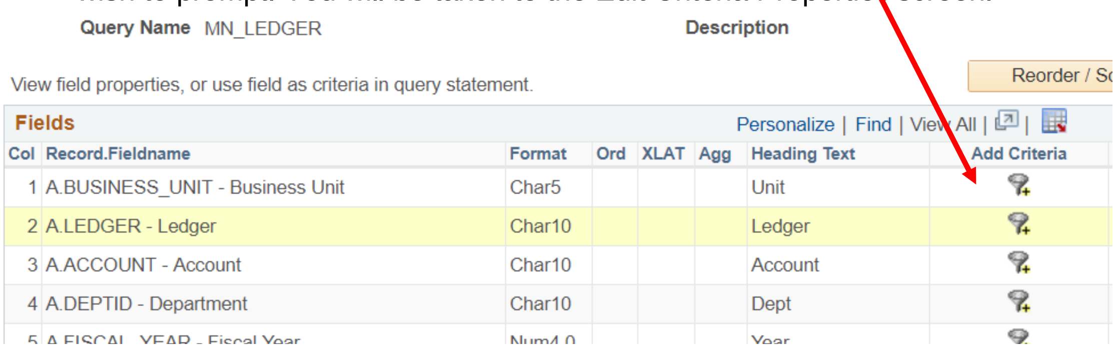


7. Expressions – (See the **RPT.1.02.03 - Intermediate PeopleSoft Query** business process document for more information about creating expressions.)

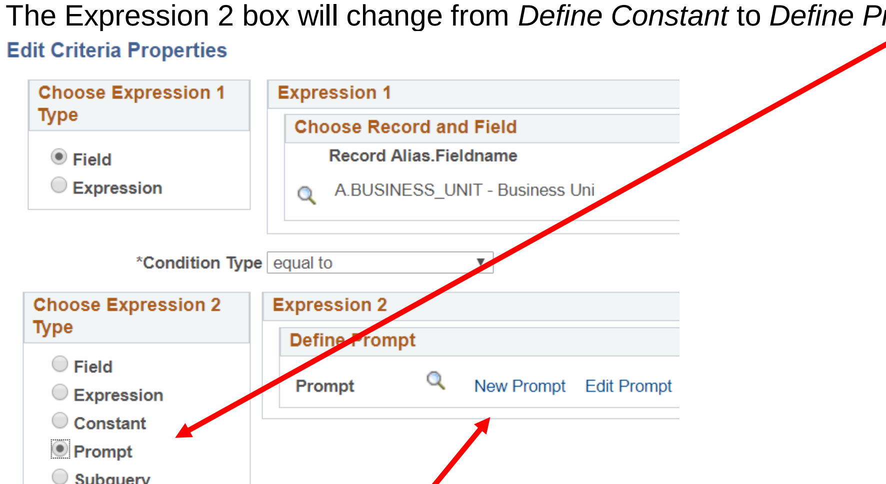
8. Prompts – You can add runtime prompts to your query from Prompts and Fields. Adding a prompt lets you refine a query when it is run. For example, suppose you want to change a query so that you can prompt the user to enter a *Business Unit*. Before you added the prompt, the query always retrieved rows for a specific business unit. Adding a prompt to the query enables the user to enter any *Business Unit*, and then the query can return results based on the value provided when running the query.

   When you run a query with a prompt, the prompts must be entered when the query is run. **Enter** the value into the field. The query uses the value that you enter as the comparison value for the criterion that included the prompt. To create a prompt, **change** the *Criteria Type* to 'Prompt'.

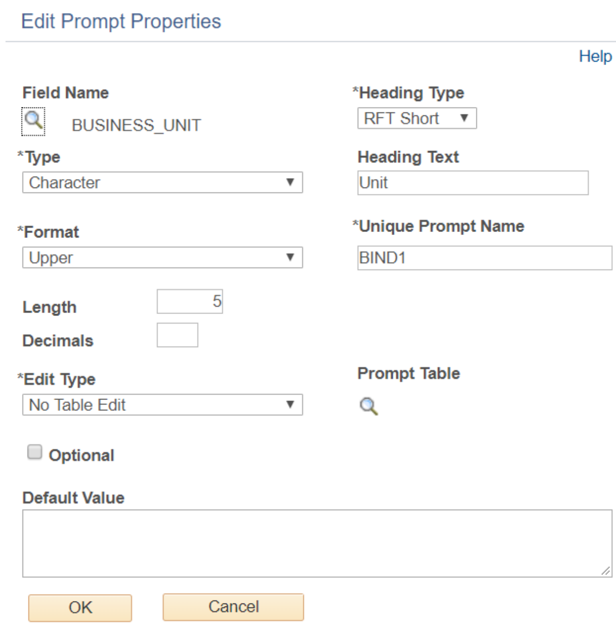
   a. To add a prompt from the *Fields* tab, **click** the *Add Criteria* icon for the field you wish to prompt. You will be taken to the Edit Criteria Properties screen.



   b. In the *Choose Expression 2 Type* box, **click** the radio button next to *Prompt*. The Expression 2 box will change from *Define Constant* to *Define Prompt.*



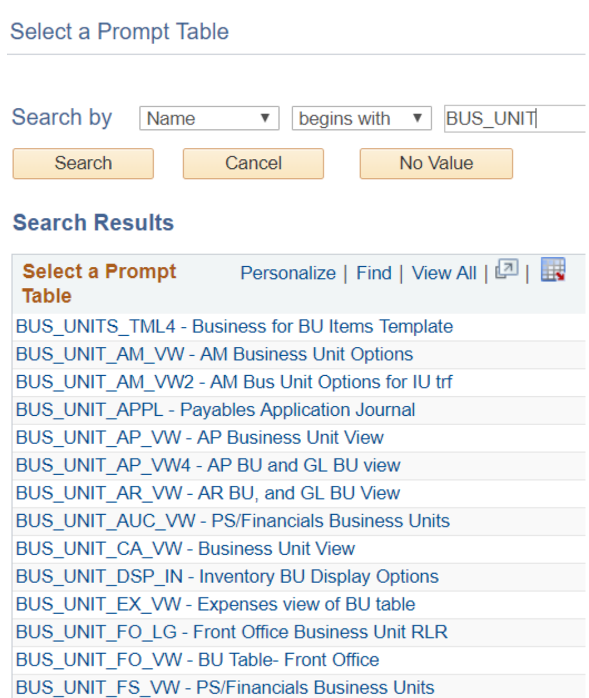
   Click the *New Prompt* hyperlink. You will be taken to the Edit Prompt Properties screen.

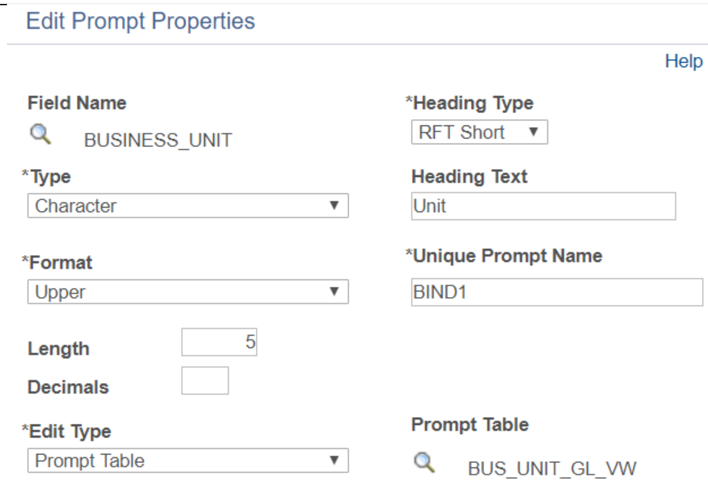


c. Your field has already been identified for the prompt.

d. If you would like to have a look up table for your prompt, **click** the icon.

e. **Enter** your table name criteria and **click** search to see a list of available tables.





f. **Select** a value. You will be taken back to the Edit Prompt Properties screen.

g. **Click** OK. You will be taken back to the Fields tab.

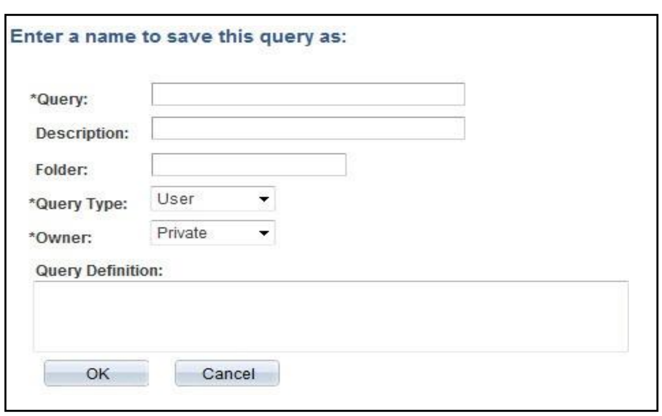
h. If you navigate to the Criteria tab, you will see your new prompt criteria as an expression with a colon and a numeric value. On the Prompts tab, you will also see your newly defined prompt information. When the query is run, the user will now be prompted for *Business Unit*.

9. HAVING – (See Using Having Criteria; in the **RPT.1.02.04 -- Advanced PeopleSoft Query** business process document.)

10. – **Click** View SQL tab at any time during the query creation process to view the SQL that has been built by PS Query.

VI. Saving a Query

1. To save your query at any time, **click** Save.
2. To make changes to an existing query or to copy it, you can **click** the *Save As* hyperlink to give the query a new name. (No two public queries can have the same name.)



3. If you are saving a new query, the Enter a name to save this query: screen will appear. **Enter** an appropriate name in *Query* field. The name can be no more than 30 characters long. This is a required field. Only letters, numbers and underscores may be included in query names - Symbols (i.e. *&^ %) and spaces may not be used.

    a. Naming conventions-

    It is recommended that all users save their queries with meaningful names, to assist in finding the query easily and to reduce duplication of queries. The name is the key item used when you or someone else searches for a query. Within the UW System, the naming convention is to use the 3 letter institution designation in the beginning of the query name to show the query was not delivered by PeopleSoft. The standard naming convention is as follows:

    BusinessUnit(3char)_Module(2char)_QueryDescription(up to 25 char.)

    Example, to save a query that UW Oshkosh uses to find Account information by fund, the name would be “OSH_GL_ACCOUNT_BY_FUND”.

4. A short *Description* can be entered. Field length: 30 characters.
5. A *Folder* name can be given to help organize and aid in searching for queries. Field length: 18 characters. The folder name is another way to search queries. Similar queries can be added to the same folder to find easier. A folder is not required.
6. The *Query Type* is a required field and defaults to ‘User’.
7. The *Owner* is a dropdown value of either ‘Public’ or ‘Private’. Private queries can only be used by the owner. Public queries may be used by all users. The default value is ‘Private’. Your security will determine whether you can save a query as a private query (only seen by you), or a public query (seen by everyone).
8. The *Query Definition* field is a memo field where you can put a detailed description of the query and its functions, or any other information that a user needs to know about the query.
9. **Click** OK to save your query.

VII. Using Wildcard Characters to Find Information

PeopleSoft applications support three wildcard characters to help you search for data in character fields. You can use these wildcard characters to find the exact information that you need.

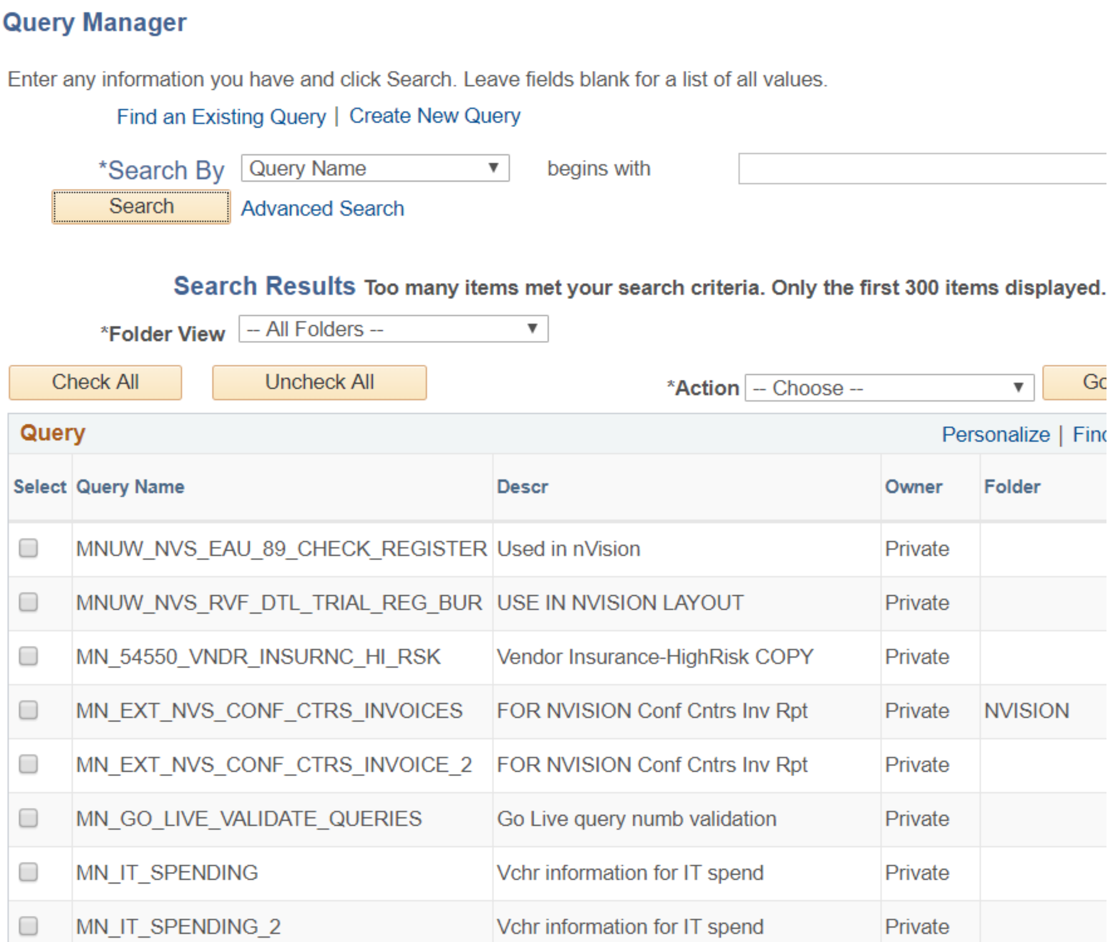
NOTE: Wildcard characters only work with the ‘begins with’ and ‘contains’ operators.

The supported standard wildcard characters are:

Wildcard	Search Action
% (percent symbol)	Match one or more characters.
_ (underscore)	Match any single character.
\ (backslash)	Escape character; do not treat the next character as a wildcard.

- *%* matches any string of zero or more characters. For example, *C%* matches any string starting with C, including C alone.
- _ matches any single character. Such as, *_ones* matches any five-character string ending with *ones,* such as Jones or Cones.
- To use one of the wild-card characters as a literal character, meaning to include a *%* in your string, precede the % character with a \, as \%.

The following will demonstrate an example, if you wanted to find the SFS Centrally maintained queries, you could search for 'SFS%' in the *begins with* search box for *Search By* 'Query Name'. However, the system returns a list of all queries that begin with *SFS* which includes queries that are NOT maintained centrally, as you can see below:



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 Query Name begins with

Search Advanced Search

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

*Folder View -- All Folders --

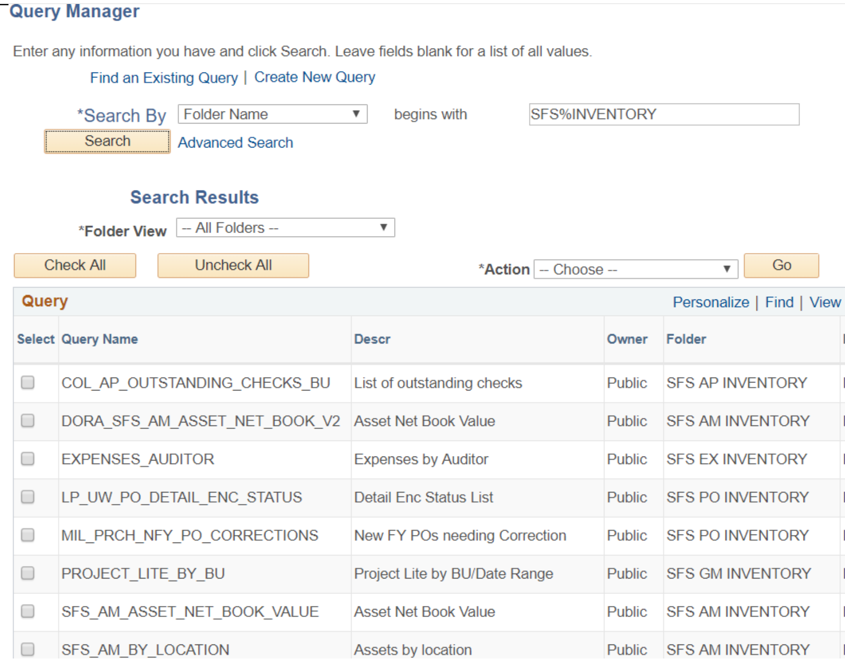
Check All Uncheck All *Action -- Choose -- Go

Query Personalize | Find

Select	Query Name	Descr	Owner	Folder
	MNUW_NVS_EAU_89_CHECK_REGISTER	Used in nVision	Private	
	MNUW_NVS_RVF_DTL_TRIAL_REG_BUR	USE IN NVISION LAYOUT	Private	
	MN_54550_VNDR_INSURNC_HI_RSK	Vendor Insurance-HighRisk COPY	Private	
	MN_EXT_NVS_CONF_CTRS_INVOICES	FOR NVISION Conf Cntrs Inv Rpt	Private	NVISION
	MN_EXT_NVS_CONF_CTRS_INVOICE_2	FOR NVISION Conf Cntrs Inv Rpt	Private	
	MN_GO_LIVE_VALIDATE_QUERIES	Go Live query numb validation	Private	
	MN_IT_SPENDING	Vchr information for IT spend	Private	
	MN_IT_SPENDING_2	Vchr information for IT spend	Private	

The query inventory list uses a naming convention of 'SFS_module two letter designation_query name' then you could reduce the list to those that are centrally maintained by using ALL three wildcard options.

1. *Search by* 'FOLDER Name or use % as a wildcard to search on Key words.
2. You can also find these special queries by changing the *Search by* to 'Folder Name' *begins with* 'SFS%Inventory':

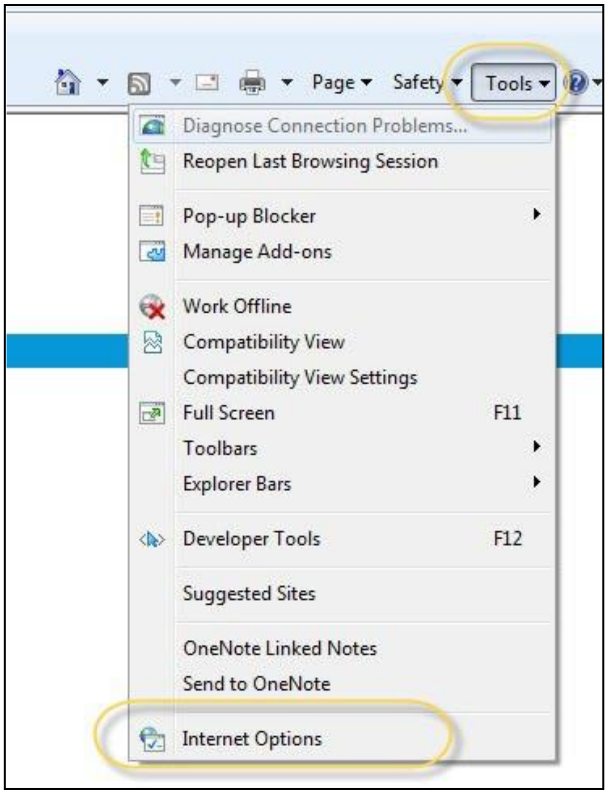


VIII. Internet Explorer Settings for Query Download to Excel

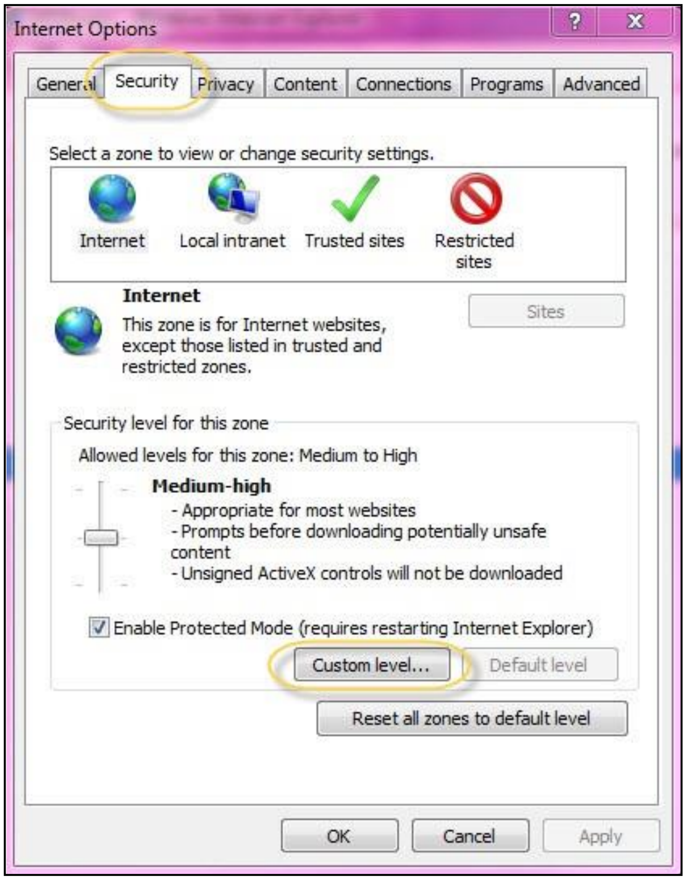
Depending on the settings on your computer, when you run a query to Excel, it may or may not open in the Internet Explorer browser window. If Excel does open in the browser window, Excel functionality is not available. This setting is defined in Internet Explorer.

To adjust the settings:

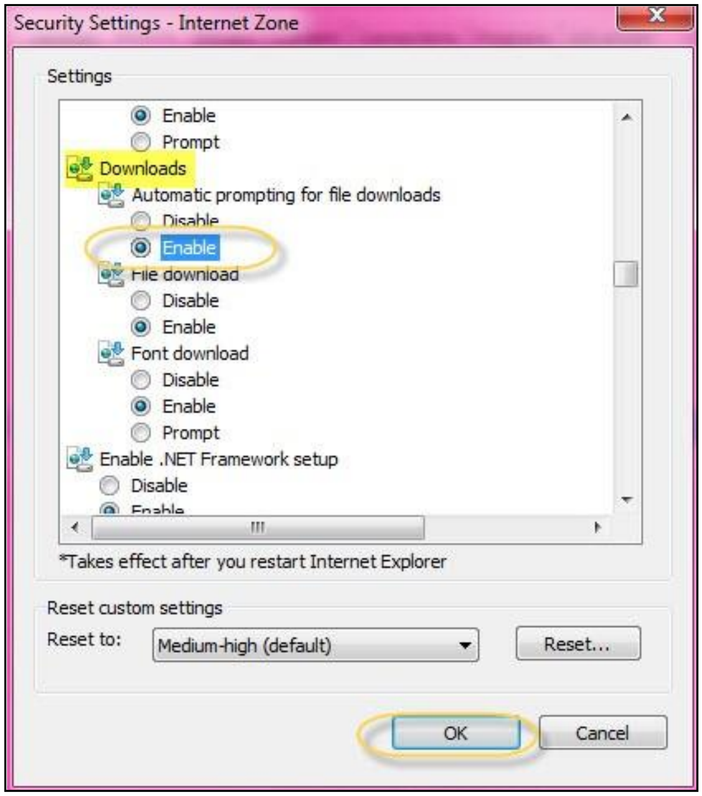
1. **Open** an Internet Explorer Window.
2. **Choose** “Tools” from the menu in the upper right hand corner.

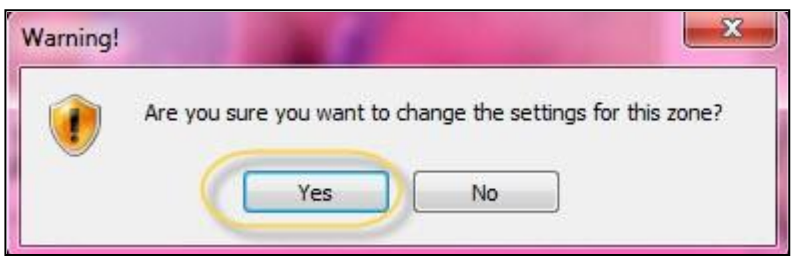


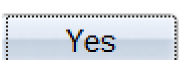
3. **Click** Internet Options.
4. In the Internet Options screen, **click** Security.
5. **Click** Custom level... .

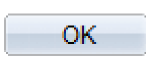


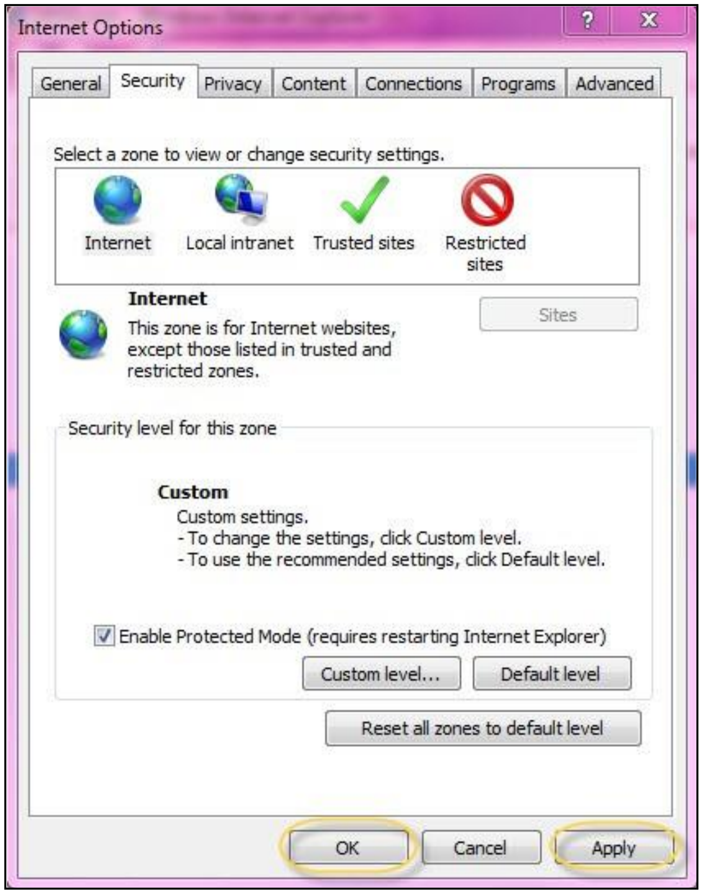
6. **Scroll** down to the “Downloads” heading.
7. Under “Automatic prompting for file downloads”, **choose** the “Enable” radio button.



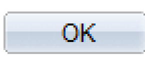


8. **Click** 

9. **Click** 



10. Click 

11. **Click** .

12. Excel will now open in a new window when opened.

Revision History

Author	Version	Date	Description of Change
Andrea Vredberg	1.0	6/24/2013	Initial Draft from 8.9 version
Stacy VanWormer	2.0	07/23/2013	Revision
Susan Kincanon	2.1	08/07/2013	Review, format, edit and ready for final review
Brendan McHugh	2.1	08/09/2013	Review
Scott Larson	2.1	08/14/2013	Review and approve
Susan Kincanon	2.2	08/14/2013	Finalize and publish to website
Susan Kincanon	3.0	09/05/2013	Added the Wildcard section and republish
Mike Niebanck	4.0	12/6/2018	Changed to v9.2