QUERY VIEWER BASICS

PeopleSoft Financials 9.2 Web Query is a graphical tool that allows users to easily retrieve specific data from the PeopleSoft system. The data is retrieved by running pre-defined or custom queries.

Query Viewer is a read-only reporting tool that allows users to easily retrieve specific data from the PeopleSoft system. Query Viewer allows users to:

- Search for a query using the basic or advanced search functions
- Run a query and display results in a new browser window (either HTML or Excel)
- Download the results to an Excel spreadsheet or a CSV text file
- Print a query
- Schedule a query to run at a predetermined time

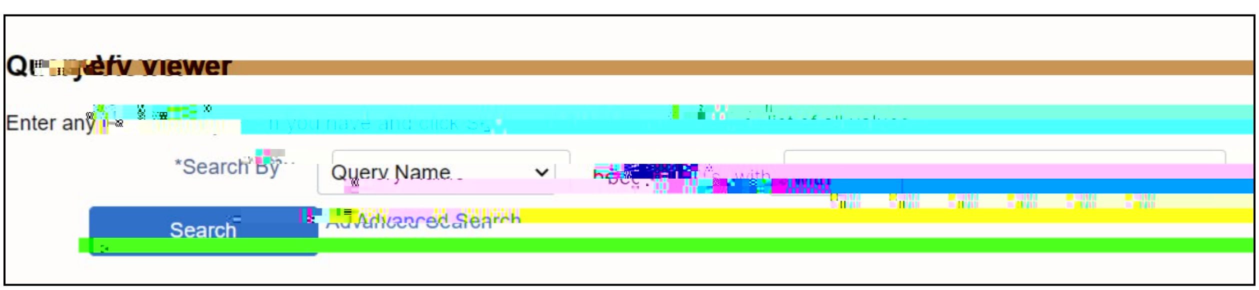
Users are not able to edit queries in Query Viewer but instead can run pre-defined queries that are BOR-delivered, institution-developed, or private queries created and saved by a user.

A query is a request for data results from the source database. As used in PeopleSoft Financials, queries are run as user-defined reports. A public query is one that anyone can run. A private query is one that only the query's creator can access. If users run a public query and do not receive any results, it could be a result of security limitations or that prompted criteria did not result in any valid results.

Searching for a Pre-Defined Query

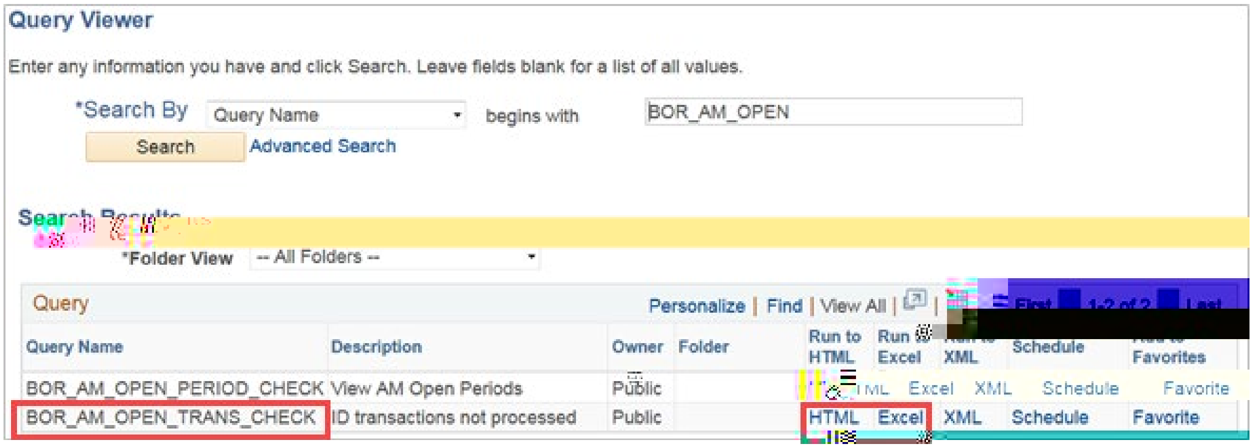
Users can find queries specific to each module area by navigation to the documentation index page of the [GeorgiaFIRST Financials website](#).

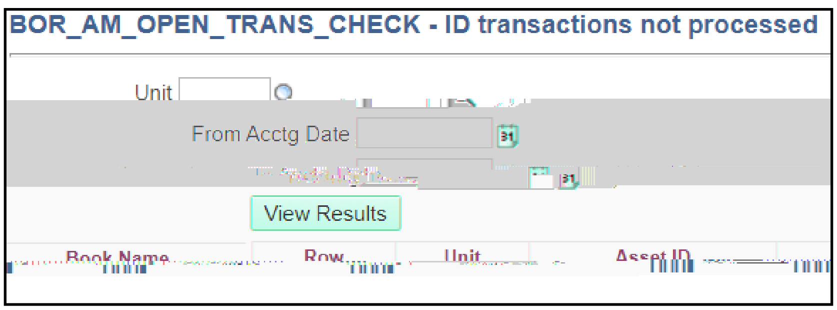
Navigation: Reporting Tools > Query > Query Viewer

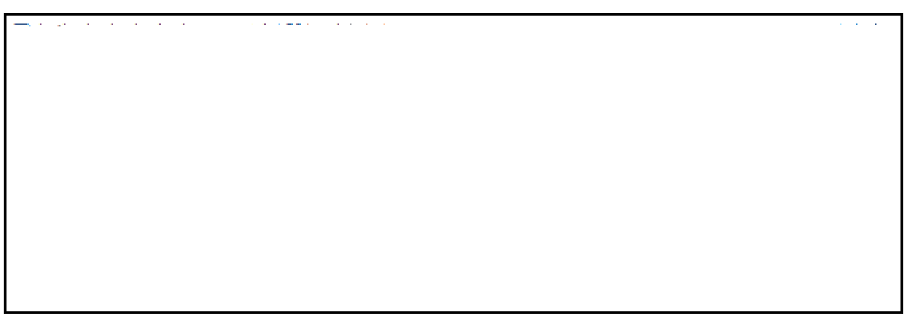


When searching for a pre-defined query, remember no spaces exist in query names. Also, the more details entered into the search field, the more exact the user has to be. If a query name is misspelled, users may not get the results they are looking for.

For example, when searching for the “BOR_AM_OPEN_TRANS_CHECK” query if a user cannot remember the exact name of a query, a portion of the query name such as “BOR_AM_OPEN” can be entered in the search field.







The % character acts as a wildcard for multiple characters. In the above example, Ledger looks for any possible results (ORG_BD, DETAIL_EN, etc.). The criteria set for

Account, however, will look for any accounts starting with 553, including 553201 and 553123.

The _ (underscore) character acts as a wildcard for exactly one character. In the above

Scheduling a Query

Scheduling a query allows users to set a query to run at a specific time and to set recurrence options. Users schedule queries through the Schedule Query menu selection or directly on the Query Viewer page.

The Process Scheduler Request page enables users to set the run date and time, how often the process runs, output type, and format. Users can then go to the Report Manager to see query results.

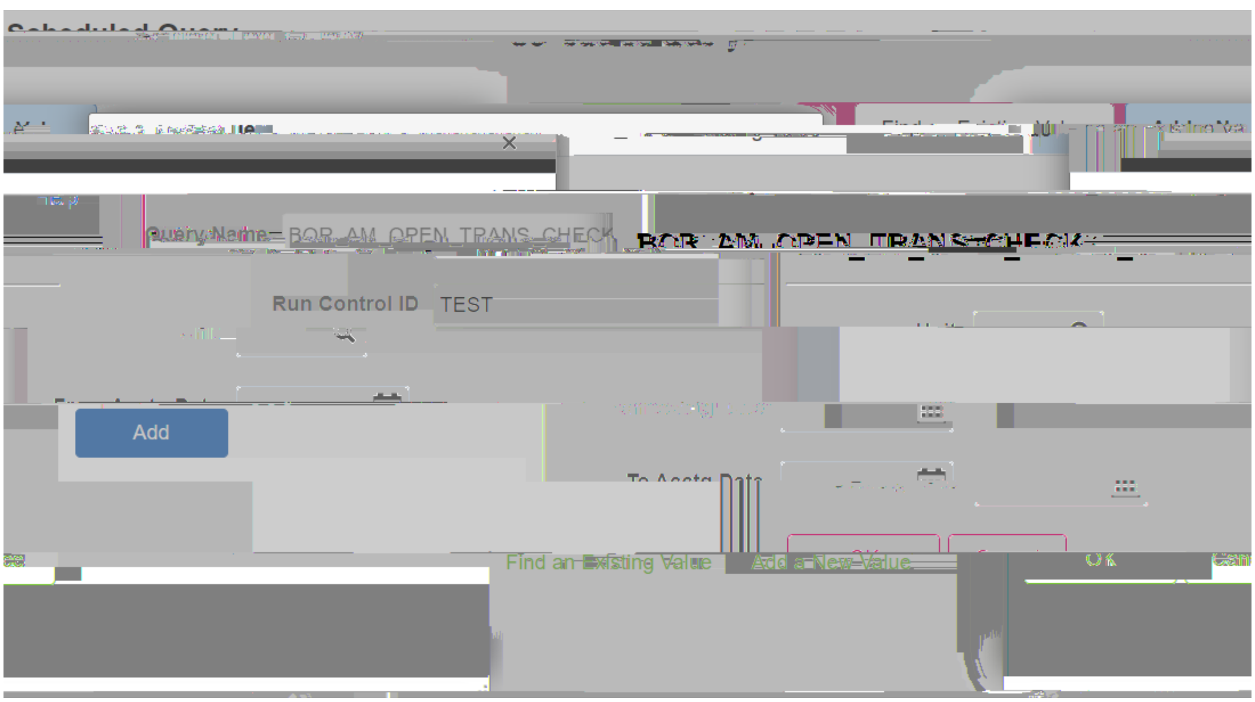
Navigation: Main Menu > Reporting Tools > Query > Query Manager

Using the above instructions on Searching for a Pre-Defined Query, find a query to schedule. After the desired query is visible in search results, click the Schedule link to begin the scheduling process.

Clicking the Schedule link will open the Scheduled Query page that lists query attributes including whether the query is a Private Query and the Query Name. Users must enter a Run Control ID for the selected query and schedule settings.

Scheduled Query

Click the Add button after filling in the Run Control ID. If the query is set up to request parameters, a window will open where the user can enter these parameters. After filling in prompted parameters, click the OK button.



The next page lists the selected Run Control ID, Query Name, and has a field where the user can input a Description. Below these fields, the page will list any prompted parameters filled in during the previous step. If parameters need adjusted, the Update

Queries scheduled to run on a recurring schedule can also be viewed through Report Manager. The navigation is PeopleTools > Reporting Tools > Report Manager. Query results will be available through the link in the Report column.