Query Training

By: Tanya Harris

Paul Angulo, CPA
County Auditor-Controller

General Objectives

• Understand Query Layouts and Terminology
• View query results online in a grid
• Design and run queries
• Correctly select and specify criteria for retrieving data
• Understand and retrieve information from effective-dated tables
• Create runtime prompts
• Access information from multiple records
• Perform predefined calculations
• Export query results to Excel
PeopleSoft Queries

With PeopleSoft Queries, you can easily create queries to access data in the PeopleSoft database. The queries can be simple or complex based on your requirement. In addition they can be one-time or can be used repeatedly.

The following are some examples of how you can use PeopleSoft Queries:

• Preview queries within Query Manager and Query Viewer, displaying the results in a grid for review
• Run queries from Query Manager or Query Viewer as a separate process, and view the results in a separate browser window
• Schedule queries so that they run at predefined times or on recurring schedules
• Download & format query results in Excel
Applications of Queries

PeopleSoft Query is designed to output into several reporting options:

PeopleSoft Reporting Tools

- PS/Query: PeopleSoft Query allows you to extract information that you’re looking for using visual representations of your PeopleSoft database, without having to write Structured Query Language (SQL) statements.

- Crystal Reports: Versatile report formatter from Seagate Software. Using PeopleSoft’s Open Query, Crystal accesses all database platforms supported by PeopleSoft.
PeopleSoft Reporting Tools

• Excel: Query Link provides the ability to send queries from Query to a Microsoft Excel Spreadsheet. Your data is sent directly from your query into a predefined spreadsheet layout.

• nVision: A tool that enables the import of data directly from a query into predefined excel layouts for data analysis.

Varieties of Queries

• User Queries: (DEFAULT) User Queries are those created to retrieve data directly from the Query manager or Query Viewer applications which are web-based.

• Reporting Queries: Reporting Queries are similar to user queries although their intended use in with another reporting tool. They can be used as data sources for generic queries, schedules queries, Crystal Reports, nVision or Cube Manager. (Used exclusively by Oasis Team)
Varieties of Queries

- Process Queries: Process Queries run periodically, via batch processes most often using the PeopleSoft Application Engine and the Query API (application programming interface). (Used exclusively by Oasis Team)

- Role Queries: Role Queries are used by PeopleSoft Workflow to designate recipients of emails, forms or worklist entries. (Used exclusively by Oasis Team)

Running a Query from a Browser

The Query Viewer is the primary place to run and view queries. When searching for a query, you can choose to run the query immediately and view the results in a new browser window or schedule it to be run at a later time (or a predefined schedule)
Running a Query from a Browser

Queries Viewer enables you to:
– Search for a query
– Preview a query in the active browser window
– Run a query and display results in a new browser window
– Print a query
– Schedule a query

Running a Query
Running a Query
### Information Displayed for each query

- **Query Name:** The database name of the query

- **Query Description:** The description of the query entered upon creation

- **Query Owner:**
  - Private – Only the logged on User ID can modify or delete this query
  - Public – Any user can modify this query

---

<table>
<thead>
<tr>
<th>Query Name</th>
<th>Description</th>
<th>Owner</th>
<th>Folder</th>
<th>Run To Report</th>
<th>Run To Schedule</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>AR_BALANCE</td>
<td>Actual ARs</td>
<td>D-12</td>
<td>Private</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BORROW_CASH_BALANCE_OVER_100</td>
<td>Actual ARs for Over 12 months</td>
<td>Private</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CASH_BALANCE</td>
<td>Actual ARs</td>
<td>D-12</td>
<td>Private</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CASH_BALANCE_31</td>
<td>Actual ARs for 31 days</td>
<td>Private</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CASH_POOL_BAL_TEST</td>
<td>Tie to Pool Report</td>
<td>Private</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CF_102120_DW1</td>
<td>Private</td>
<td>CASHFLOW</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CF_CURRENT_DETAIL_DEPT_BLE</td>
<td>Private</td>
<td>CASHFLOW</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DEPT_CF_FUND_PLAN_EXP</td>
<td>Dept Analysis 11.2.11</td>
<td>Private</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DEPT_CF_FUND_PLAN_PAY</td>
<td>Dept Analysis 11.2.11</td>
<td>Private</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DEPT_CF_FUND_PLAN_PAY</td>
<td>Dept Analysis 11.2.11</td>
<td>Private</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DEPT_FRA_EMP_Benefit</td>
<td>Report</td>
<td>Private</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

County of Riverside ▪ Office of the Auditor-Controller
Information Displayed for each query

- Run to HTML: The query will be executed and the results will display in a new browser window.

- Run to Excel: The query will be executed and the results will display in a new Excel Spreadsheet.

- Schedule: Schedule the query to run at a later time.

Query Results

This is your output when you select run to HTML, it is often referred to as a Grid.

Select this to download into Excel.
Query Results

- As shown on the previous screen, the search results will display in a new browser window.
- The default display will be 100 rows.
- You can select the “View All” hyperlink to display all the query results.
- You can also download your results to an Excel Spreadsheet or CSV (Comma-Separated Values) Text File.

Troubleshooting Tip

If you are having problems finding your query make sure that you are in the correct environment. Queries should be run in Reporting not Production.
What Environment Are You In?

- Reporting Environment
- Production Environment

Query Manager

County of Riverside ■ Office of the Auditor-Controller
Query Manager

Functions of Query Manager
- View, change or download an existing query
- Create a new query
- Search
Creating a Query

Creating your own queries enables you to select the table or tables from which you need to retrieve data. You can also select the fields within the tables so that the query displays only required data.
Creating a Query

There are six steps to creating a basic query:

1. Select the record(s)
2. Select the field(s)
3. Set the query preferences
4. Edit the field properties
5. Save the query
6. Execute the query

The first step in creating a query is selecting a record. The record you select establishes the primary focus of your query. You can search for existing records by entering appropriate key words in the search field.
Creating a Query

- Example: We want to create a query to get the detail for all Appropriation 2 expenditures in the all ACO Dept ID’s that hit the General Ledger in FY 2010

- If you don’t know the record name just type **LEDGER** in the Search By Record first

Basic Search

Once you put Ledger in the Basic Search Field it will show a total of 9 Records that start with Ledger. You can also search for Ledger by Field
Advanced Search

If you have no clue about where to start, you can go to the Advanced Search box.

Type Ledger in the Field name and it will display every record that has Ledger as a field.
Advance Search

Two most commonly used Search Types:

- Begins with: The text entered in the “Search For“ text box must be the beginning text of the Search In criteria displayed in the search results

- Contains: The text entered in the “Search For“ text box must be in the description of the query to be displayed in the search results

If you leave the field blank and click search, it will display up to 300 records in pages of 20 at a time.

Advanced Search

An Advanced Search will show you all 186 Records that has “Ledger” as a Field within the Record.
Creating A Query

When the Available Records are displayed, you will get the following information for each Record:

- **Recname** – This is the database record name – the Record description
- **Add Record** – Click this hyperlink to select the record for this query
- **Show Fields** – Click on the icon to display all fields associated with the record. This is to determine if the record is the correct one required for the query.

Creating a Query

Select “Add Record” for LEDGER - Ledger Data. Once the record is selected, the Query tab will be the active page listing the fields associated with that selected record.
Field Selection

Chosen Records

- Folder Icon: Hide or Unhide the list of fields associated with the selected record. This is useful when you are using more than one record for the query and only need to view the fields associated to one record at a time.

- Alias: The database record name – the record description. For example, Department is the Alias for DeptID.

Field Selection

- Record: The record name in the database and the description of the record.

- Hierarchy Join: This hyperlink allows you to join a child record to its parent.

- Minus Button: Used to delete a hierarchy join.
Fields
The page will automatically display all fields related to each record. You can use the scrollbar to find the field(s) required for the query, or use the navigational options in the Fields header

- Checkbox – Check the box to select this field for the query
- Key Symbol – Indicates the key fields for this record

Fields

- Field – The field name as it is stored in the database
- Add Criteria Button – Used to add a row of Criteria to the query
- Join Record Name – Some fields are related to other records. Those related records can be joined to this query using this hyperlink.
Fields

For the query we are building together, in order to get all expenditures for FY 2010 these are some of the data fields we need to see and/or query on:

- Ledger
- Account Fiscal Year
- Dept ID Accounting Period
- Fund
- **Posted Base Amount**

*(do not select Posted Total Amount)*
Fields

- Col – This is the order in which the field will be displayed in the query results
- Record.Fieldname – The fieldname as it is stored in the database
- Format – This is the format of the field as it is defined in the database
- Ord – Indicates if this field has been selected to be used for sorting
- XLAT – This indicates if the field is a code from the translate table

Fields

- Agg – This indicates if an aggregate function has been assigned to this field
- Heading Text – The default text as defined in the database
- Add Criteria – Used to add a row of Criteria to the query
- Edit – Select this button to edit the field properties
- Delete – Select this button to delete the field from the query
### Edit Field Properties

Once fields have been selected for the query, you have the option of editing the field properties to enhance the displayed results of the query.

#### Field Properties

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Format</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 ACCOUNT</td>
<td>Create</td>
<td>Name of the account</td>
</tr>
<tr>
<td>2 DEPT</td>
<td>Create</td>
<td>Name of the department</td>
</tr>
</tbody>
</table>

### Edit Field Ordering

#### Field Ordering

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 ACCOUNT</td>
<td>Name of the account</td>
</tr>
<tr>
<td>2 DEPT</td>
<td>Name of the department</td>
</tr>
</tbody>
</table>

COUNTY OF RIVERSIDE OFFICE OF THE AUDITOR-CONTROLLER
Edit Field Ordering

- You can change the order of how you would like to see your query results.
- You can decide how you want the query sorted by
- The number “1” represents the highest order or sort
- You can also select the box to change the sort from Ascending to Descending

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>LEDGER</td>
</tr>
<tr>
<td>2</td>
<td>ACCOUNT</td>
</tr>
<tr>
<td>3</td>
<td>DEPT</td>
</tr>
<tr>
<td>4</td>
<td>FUND CODE</td>
</tr>
<tr>
<td>5</td>
<td>COLOR</td>
</tr>
<tr>
<td>6</td>
<td>TAX YEAR</td>
</tr>
<tr>
<td>7</td>
<td>ACCOUNTING PERIOD</td>
</tr>
<tr>
<td>8</td>
<td>POSTED RELAY</td>
</tr>
</tbody>
</table>

Sort Order

Translate Values

- Translate values are helpful in queries. If a field has an associated translate value, the XLAT column will contain one of three values, N, S or L. An additional group box will also appear to Translate the Value

- To modify the translate field, it can be accessed in the Edit Field Properties page.
Translate Values

- The Three Options for displaying translate values are:
- None – (DEFAULT) - Translate code, Assumes Current Date Logic
- Short – 10 char Xlatshortname. You have to specify effective date logic
- Long – 30 char Xlatlongname. You have to specify effective date logic
Translate Values

- There will be times that a query will return results which are difficult to understand.
- For Example, In the query ASSET_DEPRECIATION_ROWS you will get a Trans Type of “PDP”, “TRE” or “RCT”
- You can Translated description of these values with the options of getting the Short or Long Description of those Trans Types
Translate Values

When Translate Value of Short/Long has been selected you will also see a box entitled Effective Date for Short/Long with three Radio Buttons

- Current Date – (Default) - Here you specify a date in which this change will become effective. Typically users want results that are defined as current (Less than or equal to today’s date without exceeding)
- Field – Provides the flexibility of choosing records that do not maintain a “current” status (rarely used)
- Expression – These are formulas and calculations created by the author of the query (rarely used)
Aggregate Function

- An aggregate is a predefined summary calculation in Query. This function is a special type of operator that returns a single value based on multiple rows of data.
- When your query includes one or more aggregate functions, PeopleSoft Query collects related rows and displays a single row that summarizes their contents.
- The aggregate functions available are:

<table>
<thead>
<tr>
<th>Avg</th>
<th>Count</th>
<th>Max</th>
<th>Min</th>
<th>Sum</th>
</tr>
</thead>
</table>

Example: Suppose you create an Order query that includes Customer ID and Amount Fields for each item ordered.
- You want to find out how much each customer has ordered.
- Without any aggregate functions, this query would return one row for every customer and amount combination.
- If you apply the aggregate function Sum to the Amount field, the query can be narrowed down to display one row that summarizes the amount for each customer.
### Aggregate Function

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:24</td>
<td>Date</td>
<td>Voucher</td>
<td>Vendor</td>
<td>Status</td>
<td>Total Amount</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>1/18/2011</td>
<td>000000009</td>
<td>1234567890</td>
<td>100000009</td>
<td>500000000000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Edit Field Properties

I changed the Heading Text from Year to Fiscal Year

#### Edit Field Properties

- **Field Name:** A.FISCAL_YEAR - Fiscal Year

#### Aggregate

- **None**
- **Sum**
- **Count**
- **Min**
- **Max**
- **Average**

#### Heading

- **No Heading**
- **RFT Short**
- **Text**
- **RFT Long**

**Heading Text:**

- **Fiscal Year**

*Unique Field Name:*

- **A.FISCAL_YEAR**

---

**County of Riverside - Office of the Auditor-Controller**
Edit Field Properties

- The text listed in the Headings Text column is used as the Heading description in your output to the Grid and Excel.

- You can change field attributes to reflect what you want to see on a report. For example: If you are looking at a Capital Asset query, you can change the field “Profile_ID” to Assets Profile Id and you can change the DESCR field to Asset Name.

Edit Field Properties

You can choose a column heading from the following:

- No Heading: Indicates that the data is to display with no column heading.
- Text: You can enter text to be displayed as the column heading.
- RFT Short: The Record Field Text (RFT) short description as it was defined in the database.
- RFT Long: The Record Field Text (RFT) long description as it was defined in the database.
- Heading Text – Previews the text as it will be displayed in the query results.
Fields after Editing and Ordering of Data

**Fields**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Format</th>
<th>XTAT App</th>
<th>Heading Text</th>
<th>Add Criteria</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ledger</td>
<td>Char10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fund Code</td>
<td>Char5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dept</td>
<td>Char10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Account</td>
<td>Char10</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Class</td>
<td>Char5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fiscal Year</td>
<td>Num4.0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Period</td>
<td>Num3.0</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sum Amount</td>
<td>Sum25.2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Account Description</td>
<td>Char30</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Query Management**

After generating a query, save it so you can execute it again at a later time. You can save a query at any time through the Query Manager page, after you have selected one record and at least one field for your query.

**Saving Queries**

After generating a query, save it so you can execute it again at a later time. You can save a query at any time through the Query Manager page, after you have selected one record and at least one field for your query.
Tips for Saving Queries:

- Query Name: Must be upper case and can be up to 30 characters. You cannot have spaces or any special characters other than underscore.

- Description: You can add a description for your query that can be up to 30 characters, mixed case, with special characters.

- Type: User (default and only option available to users outside of OASIS), Reporting, Process, Role.

Tips for Saving Queries

Owner: Indicates who has access to the query

- PRIVATE: This is the default. Only the Operator ID that created the query can open run, modify or delete the query. Only the Operator ID that created the query can modify the owner to Public.

- PUBLIC: Any user with access to the records involved can run the query. Any operator ID with Public access can modify but only Oasis Team can delete the query.
Tips for Saving Queries

• Since OASIS does not allow users to modify a public query or run a query without first being saved, you must save your modified query as a Private one.

• Since all Public Queries must have unique names, PeopleSoft will not allow the saving of a Private Query with the same name as an existing Public Query.

• You should name your queries to closely resemble what the query does to expedite the easy identification of the query for future use.

Running a Query

Once you save your query, you will have to go to Return to Search, Select the Query you just created, then Run to HTML.
Results

Windows Internet Explorer

Query Result Set too Large. (124,87)
Result of 'SQL Fetch' is over the maximum result size specified for the application server. Modify your query or increase the maximum result size.

OK

In the Query that we just built, It took forever to run and then we got an error. Why?

What was our objective when we built our Query?
– We wanted to create a query to get the detail for all Appropriation 2 expenditures in all ACO Dept ID’s that hit the General Ledger in FY 2010

We need to establish criteria to narrow the search
Criteria

As a query is created, it is possible to further specify data rows with defining criteria so that a query can be narrowed.

• You do not want to retrieve every row of data from the records you are accessing. By defining criteria rows, you can filter and pull only the information that you need.

• You are able to apply criteria to fields which are not included in the output of the query. You may want to initially have the field as output in order to verify that the criteria row executed correctly.
Criteria

Select the “Add Criteria” for each field that you want to query on.
Criteria Parts

• Fields – Select if you want to base the selection criterion on a field’s values. Usually field in another record component. When you select this option; you must go on to select a condition type

• Condition Type – The condition type determines how Query Manager compares the values of the first expression to the second expression (i.e. greater than, equal to, in list, between, etc.)

Expression – Select if you want PS Query to evaluate an expression that you enter before comparing the results to the value in the selected field.

When you select this option, you must go on to select an expression type. If you are entering an aggregate value, select Aggregate Expression check box. You can also enter parameter for length and decimal positions.
Final Criteria Tab

This is the criteria you will need to have in order to Find ACO Approp 2 Expenditures for FY 2010

<table>
<thead>
<tr>
<th>Records</th>
<th>Query</th>
<th>Expressions</th>
<th>Prompts</th>
<th>Fields</th>
<th>Criteria</th>
<th>Hiding</th>
<th>View SQL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Final Fields Tabs

<table>
<thead>
<tr>
<th>Records</th>
<th>Query</th>
<th>Expressions</th>
<th>Prompts</th>
<th>Fields</th>
<th>Criteria</th>
<th>Hiding</th>
<th>View SQL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

County of Riverside ■ Office of the Auditor-Controller
Properties

Select the Properties link at the bottom of the screen. This link is available at the bottom of all Tabs.

Query Properties

Duplicate rows of output are sometimes produced due to the query’s requirements. The Distinct check box removes duplicate rows of output. We will discuss the drawbacks of selecting this box later in the presentation.
### Expenditures Query Results

**MAM_QUERY_TRAINING** - Expenditure Query for MAM Trail

Download results in:  Excel Spreadsheet  XML Text File  (244 KB)

#### View All

<table>
<thead>
<tr>
<th>Ledger</th>
<th>Field</th>
<th>Date Format</th>
<th>Date</th>
<th>Amount</th>
<th>Fiscal Year</th>
<th>Fiscal Period</th>
<th>Fiscal Amount</th>
<th>Fiscal Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AlC</td>
<td>1</td>
<td>12302020</td>
<td>10/5</td>
<td>2543.00</td>
<td>2010</td>
<td>1</td>
<td>2543.00</td>
<td>Regular Salaries</td>
</tr>
<tr>
<td>AlC</td>
<td>2</td>
<td>12302020</td>
<td>10/5</td>
<td>2543.00</td>
<td>2010</td>
<td>2</td>
<td>2543.00</td>
<td>Regular Salaries</td>
</tr>
<tr>
<td>AlC</td>
<td>3</td>
<td>12302020</td>
<td>10/5</td>
<td>2543.00</td>
<td>2010</td>
<td>3</td>
<td>2543.00</td>
<td>Regular Salaries</td>
</tr>
</tbody>
</table>

### Exporting Data

**MAM_QUERY_TRAINING** - Expenditure Query for MAM Trail

Download results in:  Excel Spreadsheet  XML Text File  (244 KB)

#### View All

<table>
<thead>
<tr>
<th>Ledger</th>
<th>Field</th>
<th>Date Format</th>
<th>Date</th>
<th>Amount</th>
<th>Fiscal Year</th>
<th>Fiscal Period</th>
<th>Fiscal Amount</th>
<th>Fiscal Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AlC</td>
<td>1</td>
<td>12302020</td>
<td>10/5</td>
<td>2543.00</td>
<td>2010</td>
<td>1</td>
<td>2543.00</td>
<td>Regular Salaries</td>
</tr>
<tr>
<td>AlC</td>
<td>2</td>
<td>12302020</td>
<td>10/5</td>
<td>2543.00</td>
<td>2010</td>
<td>2</td>
<td>2543.00</td>
<td>Regular Salaries</td>
</tr>
<tr>
<td>AlC</td>
<td>3</td>
<td>12302020</td>
<td>10/5</td>
<td>2543.00</td>
<td>2010</td>
<td>3</td>
<td>2543.00</td>
<td>Regular Salaries</td>
</tr>
</tbody>
</table>
Exporting Data

You will have to copy this to a regular excel sheet so that you can add formula and group.

<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td></td>
<td>B</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Results

If this is a Query you just build, once you have your results you may want to run Simpler just to have something to validate your output against.
Simpler Results vs Query Results

Now let's go and look at some of the more advanced features of selecting criteria and adding (joining) additional records.
Criteria

Rows of Criteria are like an equation. They have a left side (Expression 1) and Operator (=,>) and a right side (Expression 2). You will have many options for each segment.

Choose Expression 1 Type
• This is used to specify what you are comparing
  – Field – You are comparing to a field within the records selected for this query
  – Expression – You are comparing to an expression you create. Query will evaluate each row with the expression created.
### Criteria

- Choose Expression 2 Type
- This is what Expression 1 Type will be compared to:
  - Field: You are comparing to a field within the records selected for this query
  - Expression: You are comparing to an expression you create. Query will evaluate each row with the expression created
  - Constant: You are comparing to a single fixed value
  - Prompt: You are comparing to a prompt which requires the user to enter value(s) at the time the query is executed

### Condition Type

Each Condition Type correlates to certain specific Expression 2 Types

<table>
<thead>
<tr>
<th>Output</th>
<th>Condition Type</th>
<th>Expression 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>One Value</td>
<td>Equal To</td>
<td>Constant (single value)</td>
</tr>
<tr>
<td></td>
<td>Not Equal To</td>
<td>Constant (single value)</td>
</tr>
<tr>
<td></td>
<td>Greater Than</td>
<td>Constant</td>
</tr>
<tr>
<td></td>
<td>Not Greater Than</td>
<td>Expression</td>
</tr>
<tr>
<td></td>
<td>Less Than</td>
<td>Prompt</td>
</tr>
<tr>
<td></td>
<td>Not Less Than</td>
<td>Prompt</td>
</tr>
<tr>
<td>More Than One Value</td>
<td>*In List</td>
<td>List</td>
</tr>
<tr>
<td></td>
<td>Not In List</td>
<td>Subquery</td>
</tr>
<tr>
<td>Range of Values</td>
<td>Between</td>
<td>Const-Const</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Const-Field</td>
</tr>
<tr>
<td></td>
<td>Not Between</td>
<td>Const-Expr</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Field-Const</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Field-Field</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Expr-Const</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Expr-Field</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Expr-Expr</td>
</tr>
<tr>
<td>Values That Exist in</td>
<td>*Exists</td>
<td>Subquery</td>
</tr>
<tr>
<td>Another Query</td>
<td>*Not Exists</td>
<td></td>
</tr>
<tr>
<td>Values with Wildcards</td>
<td>Like</td>
<td>Constant (with wild cards)</td>
</tr>
<tr>
<td></td>
<td>Not Like</td>
<td>Prompt</td>
</tr>
<tr>
<td>No Value</td>
<td>Is Null</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Is Not Null</td>
<td></td>
</tr>
<tr>
<td>Tree Node Value(s)</td>
<td>*In Tree</td>
<td>Tree Option</td>
</tr>
<tr>
<td></td>
<td>*Not In Tree</td>
<td></td>
</tr>
</tbody>
</table>

* Conditions that have any one option.
**Condition Types**

**Equal To**

The *Equal To* condition type finds the rows of data having a value that matches the constant specified in Expression 2.
Condition Types

**In List**

The *In List* condition finds fields having a value that match any one of the values in a list of values. With this option you are prompted to create a list with the Edit List group box.

**Like**

The *Like* condition type retrieves data containing fields that match specified portions of a character string.
Condition Types

The constant when used with the *Like* condition is case sensitive and can use the following wildcard characters to search for data:

- `%` ~ Any string of zero or more characters. For example, `C%` will find any string that begins with the letter C

- `_` (underscore) ~ And single character. For example, “_ones” will find any string of five characters ending with “ones” such as Jones and Cones

**Condition Types**

**Between**

The *Between* condition selects fields containing a value that is between two specified values. This is an inclusive range where the upper and lower values are included in the search
Condition Types

Is Null

- When you use `Is Null`, you are searching for fields that have no value. Null fields are not the same as zeros or blanks. Null fields have no data, whereas zeros and blanks are considered data. There is also an expression type of `Is Not Null`.

- The only field types that PeopleTools supports that may contain null values are non-required Long Character, Image, Date, Time and Datetime Fields.

Condition Types

In Tree

- When you use `In Tree`, the value in the selected record field appears as a node in a tree created with PeopleSoft Tree Manager.
- Since these are a bit more complicated, I will walk through this with you. We use these more at the ACO for CAFR and flux analysis. For example: A tree is used when we need to pull expenditures by function (i.e. General Government or Public Protection, etc.)
In Tree

County of Riverside - Office of the Auditor-Controller

In Tree

County of Riverside - Office of the Auditor-Controller
Boolean Expressions

- Boolean Expressions are used to further define your criteria rows.

- The Boolean Expressions used in Query include AND, OR, NOT, and parenthesis.
  - And – Returns rows of data if all rows of criteria are TRUE. For Example: Say you want all employees that live in Riverside AND work in the ACO Dept Id
  - OR – Returns rows of data if either one of the rows of criteria are TRUE (all rows are not required to be TRUE).
  - When you have more than one criteria work you can use parenthesis to control the order in which Query executes the criteria rows.

Boolean Expressions

- By default, and AND Boolean is added each time you add a new row of criteria and is displayed in the Logical column of the Criteria page.
- Simply use the drop-down arrow to switch it to OR.
Boolean Expressions

Query processes criteria in a certain order based on which Boolean expression are being used. The Order is:

1) Parenthesis
2) NOT
3) AND
4) OR

Group Criteria

- This is a function that is utilized for multiple sets of criteria.
- In our example of getting all Approp 2 Expenditures for the ACO we need to capture Accounting Periods 0 thru 12.
- We ALSO need to capture all Period 998 entries from the ACTUALS Ledger with a Class field of CJ.
- We have two sets of data groupings (Criteria)
Group Criteria

Here you will notice that you have one main group as noted with the double parenthesis and a subgroups within it.

Edit Criteria Grouping

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

- A Having clause is similar to a Where clause for rows of data that have been aggregated into a single row of output.

- The system evaluates Where clauses by looking at the individual table rows before they are grouped by the aggregate function, and then it evaluates Having clauses after applying the function.

- Therefore, if you want to check the value returned by the function, you must define Having criteria.

Example:

- You have a list of voucher lines.
- First, use the aggregate function to group the business units based on the amount due.
- Then, use the Having clause to obtain a list of voucher lines in which the minimum amount is greater than $100.
Having

County of Riverside ■ Office of the Auditor-Controller

Having

This is without the Having Criteria

<table>
<thead>
<tr>
<th>Voucher</th>
<th>Invoice</th>
<th>Vendor</th>
<th>Date</th>
<th>Status</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>00233305</td>
<td>10-1105</td>
<td>116-2426</td>
<td>12/06/2010</td>
<td>Postable</td>
<td>2500.0000</td>
</tr>
<tr>
<td>00233305</td>
<td>10-1105</td>
<td>116-2426</td>
<td>12/07/2010</td>
<td>Postable</td>
<td>420.0000</td>
</tr>
<tr>
<td>00233305</td>
<td>10-1105</td>
<td>116-2426</td>
<td>12/08/2010</td>
<td>Postable</td>
<td>307.4000</td>
</tr>
<tr>
<td>00233305</td>
<td>10-1105</td>
<td>116-2426</td>
<td>12/09/2010</td>
<td>Postable</td>
<td>300.0000</td>
</tr>
<tr>
<td>00233305</td>
<td>10-1105</td>
<td>116-2426</td>
<td>12/10/2010</td>
<td>Postable</td>
<td>666.9500</td>
</tr>
<tr>
<td>00233305</td>
<td>10-1105</td>
<td>116-2426</td>
<td>12/11/2010</td>
<td>Postable</td>
<td>1202.4500</td>
</tr>
<tr>
<td>00233305</td>
<td>10-1105</td>
<td>116-2426</td>
<td>12/12/2010</td>
<td>Postable</td>
<td>452.5000</td>
</tr>
</tbody>
</table>

Having Criteria

<table>
<thead>
<tr>
<th>Local</th>
<th>Expression</th>
<th>Condition Type</th>
<th>Expression</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>MERCHANDISE_inventory - Merchandise value</td>
<td>greater than</td>
<td>100</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This is with the Having Criteria

<table>
<thead>
<tr>
<th>Voucher</th>
<th>Invoice</th>
<th>Vendor</th>
<th>Date</th>
<th>Status</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>00233305</td>
<td>10-1105</td>
<td>116-2426</td>
<td>12/06/2010</td>
<td>Postable</td>
<td>2500.0000</td>
</tr>
<tr>
<td>00233305</td>
<td>10-1105</td>
<td>116-2426</td>
<td>12/07/2010</td>
<td>Postable</td>
<td>420.0000</td>
</tr>
<tr>
<td>00233305</td>
<td>10-1105</td>
<td>116-2426</td>
<td>12/08/2010</td>
<td>Postable</td>
<td>307.4000</td>
</tr>
<tr>
<td>00233305</td>
<td>10-1105</td>
<td>116-2426</td>
<td>12/09/2010</td>
<td>Postable</td>
<td>300.0000</td>
</tr>
<tr>
<td>00233305</td>
<td>10-1105</td>
<td>116-2426</td>
<td>12/10/2010</td>
<td>Postable</td>
<td>666.9500</td>
</tr>
<tr>
<td>00233305</td>
<td>10-1105</td>
<td>116-2426</td>
<td>12/11/2010</td>
<td>Postable</td>
<td>1202.4500</td>
</tr>
<tr>
<td>00233305</td>
<td>10-1105</td>
<td>116-2426</td>
<td>12/12/2010</td>
<td>Postable</td>
<td>452.5000</td>
</tr>
</tbody>
</table>
Effective Date

• Effective-dated records are those records that contain the field EFFDT (Effective Date).

• The effective date field is used throughout PeopleSoft applications to give data a historical perspective and allows for the viewing of data changes over time.

Effective Date

• When you are using a PeopleSoft application for day-to-day processing, you usually want the application to give you the currently effective rows of data.

• Essentially, the application must return the row in which the effective date is less than or equal to the current date.

• You do not need to see the history rows, which are no longer accurate, not do you need to see future-dated rows, which are not yet in effect.
Effective Date

- When you are querying an effective-dated table, you may want to view some rows that are not currently in effect or, you may want to view all rows, regardless of their effective dates.

- Additionally, you may want to view only the rows that were effective as a specific date.
Effective Date

Effective Date enables rows of data to be classified in one of three categories:

- History – Rows of data where the effective date is less than the effective date of the current row
- Current – The row of data with the highest effective date / sequence number less than or equal to today’s date (system date on the server). There can only be one current row per high-level key
- Future – Rows of data where the effective date is greater than today’s date (system date on the server)

Effective Dates

- Effective dates can be used in your query as criteria
- When you start a new query and select an effective-dated record Query Manager automatically creates Default criteria.
- You will be prompted to choose a default for effective-date processing in your query and then edit the field to define specific dates
Effective Dates

The Effective Date Options dialog box is displayed only for effective-dated records.

If you choose one of the six effective-date comparisons (visible on Criteria tab – conditions drop-down), you will be returning one effective-dated row of information per item.
Effective Date

The flexibility comes when you vary what you want the effective date compared against

\[ \text{Effective Date} \leq \text{Maximum Effdt} \{\leq, <\} \{\text{current date, constant, field}\} \]

\[ \text{Effective Date} < \]

\[ \text{Effective Date} \geq \text{Minimum Effdt} \{\geq, >\} \{\text{current date, constant, field}\} \]

\[ \text{Effective Date} > \]

Other Effective Date Options

- First Effective Date – Returns the row that contains the lowest (oldest) effective date value
- Last Effective Date – Returns the row that contains the highest effective date value
- No Effective Date Option – Does not use any effective date logic, therefore returns all rows of effective-dated information
Effective Date

- Often times effective-dated tables have an effective status field.
- The EFF_STATUS field has two values, active and inactive.
- If you are working with effective-dated tables and looking for the current row of information, you may want to add criteria on the EFF_STATUS field to specify only active rows.

Effective Date

There is an Effective Sequence option that is used if the record can have several entries for the same effective date. For example, a capital assets, such as a tower, may exist in two locations on the same date. You would need to track both of those locations separately.
Effective Date
The Effect Sequence option will only appear if the record is Effective Sequenced, like the Location field for Assets
– First – Returns the row that contains the lowest effective sequence number within the effective-dated criteria (i.e. 0)
– Last – Returns the row that contains the highest effective sequence number within the effective-dated criteria (i.e. the last change made for that effective date). This is the default
– All – Return all effective sequence rows within the effective-dated criteria

Run-Time Prompts
• A Run-Time Prompt requires the user to enter a value for a specific field at the time the query is executed
• Run-Time Prompts start their lives as simple rows of criteria. The only difference is when you get to Expression 2, where the Prompt is placed
• The report will display only those rows of information that match the value entered in the prompt
Run-Time Prompts

- The first time you define a prompt in a report, the Edit Prompt properties page will appear.
- You will need to verify that the parameters are what you want.

**Heading Types**
- RFT Long – The long field name from the record definition.
- RFT Short – The short name from the record definition.
- Text – This is a user defined text label.
Run-Time Prompts

Edit Types

- No Table Edit – Value entered in prompt dialog box is not validated
- Prompt Table – Will be picked as the default as one is defined on the record definition. Allows validation against the prompt table which enables lookup capabilities in the prompt dialog box
- Translate Table – Will be picked if the field is validated against the Translate Table. Enables lookup capabilities in the prompt dialog box
- Yes/No – Standard validation for fields represented by check boxes on pages

Run-Time Prompts

- If the edit type is Prompt Table, make sure the Prompt Table field contains the correct record you want to prompt against
- Type, format and length all default from the field definition in the database
Run-Time Prompts

This is a query that has a Prompt for and Employee Number to show all PS Roles.

<table>
<thead>
<tr>
<th>Role Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Central Journal Approver</td>
</tr>
<tr>
<td>2 Journal Processor</td>
</tr>
<tr>
<td>3 RV PeopleSoft/HR</td>
</tr>
<tr>
<td>4 RV/PS - ASSET REVIEWER - ACO</td>
</tr>
<tr>
<td>5 RV/PHYSICAL ASSET PROCESSOR</td>
</tr>
<tr>
<td>6 RV/PS VOUCHER APPROVER DEPT</td>
</tr>
<tr>
<td>7 RV/PS PROCESSOR 1</td>
</tr>
<tr>
<td>8 RV/PS PROCESSOR 2</td>
</tr>
<tr>
<td>9 RV/PS PROCESSOR 3</td>
</tr>
<tr>
<td>10 RV/PS INQUIRY</td>
</tr>
<tr>
<td>11 RV/PS QUERY USER</td>
</tr>
<tr>
<td>12 RV/PS CENTRAL BUDGET PROCESSOR</td>
</tr>
<tr>
<td>13 RV/PS COMPL COORDINATOR</td>
</tr>
<tr>
<td>14 RV/PS COMPS REVIEWER</td>
</tr>
<tr>
<td>15 RV/PS JAIL PROC - BATION</td>
</tr>
<tr>
<td>16 RV/PS JAIL PROC - CONTROL</td>
</tr>
<tr>
<td>17 RV/PS JAIL PROC - JAIL LOAD</td>
</tr>
<tr>
<td>18 RV/PS JAIL PROC - PRE APPR</td>
</tr>
<tr>
<td>19 RV/PS INQUIRY</td>
</tr>
<tr>
<td>20 RV/PS USER II</td>
</tr>
<tr>
<td>21 RV/PS USER III</td>
</tr>
<tr>
<td>22 RV/PS INQUIRY</td>
</tr>
</tbody>
</table>
Multiple Run-Time Prompts

- To add a prompt for an additional field you must add another row of criteria

- If you have more than one prompt in a query, you define the subsequent prompts through an Edit Prompts properties page that manages all the prompt definitions

Once you set up your Prompts, you will see them as soon as you Run your Query.
Queries with Multiple Tables

• When writing queries, it is very simple to retrieve information from one table. In many cases, you may want to retrieve data from more than one table or specify criteria from a second table.

• Working with multiple tables is almost as easy as working with one

Joins

• A join enables you to retrieve data from two or more records or specify criteria from more than one record.

• Whenever you perform a join, the records involved are linked based on common fields
Joins

- In Query, predefined joins are either a Record Hierarchical join or a Related Record join.

- Since these types of joins are predefined, you do not have to add any criteria to manually link the records.

Joins

- Record Hierarchy – A Hierarchical join uses records that are related through a parent-child relationship; it is defined by the Record properties and key structure when the record is created in the Application Designer

- Related Record – Related Record joins use records from non-hierarchical records that are related by common fields. This is determined by the Prompt Table relationship defined for a field in the Application Designer
Joining

To join records that share a common high-level key, simply select the Hierarchy Join hyperlink on the Query tab page.

You select another record, GL, just as we did when we selected our first record, Ledger.
Joining

Once again, a list of Records that Begin with “GL” has been selected. We need the GL_ACCOUNT_TBL record.

Click on the LEDGER Link to indicate you want to Join with that Record.
Joining

This automatically selects matching fields. You just need to select “Add Criteria”

Auto Join Criteria

Query has detected the join conditions shown below. Use the checkboxes to unselect the criteria that you do not want to add to the query and click add criteria when done. The criteria added can always be modified later using the criteria tab.

- A.ACCOUNT - Account = B.ACCOUNT - Account
- A.CURRENCY_CD - Currency Code = B.CURRENCY_CD - Reconcile Currency

Add Criteria  Cancel

Joining

This is the Effective Date Dialog Box we discussed a bit earlier
Joining

Your newly joined record and its fields are displayed below the first record. Notice that each record added to your query is assigned an incremental letter that represents a correlation, or alias, of the record.

Joining

If you join a record to a query and later decide you do not want to include the record, from the Query tab, click the delete record button and confirm the deletion by clicking Yes.
Joining

As you will notice that the newly joined field that we added to get the account description is show as B. DESCR

- In the Record.Field column, notice the letter A, before each field name. This letter is an alias that represents the FIRST table from which these fields have been extracted. If and when a second table is used in a query to extract fields from, those field names would be proceeded by the letter B which would represent the SECOND table from which those fields have been extracted. Field names extracted from subsequent table selections would be designated by the letters C, D, E, etc.

- Riverside County may limit end users in creating queries to the number of Records (tables) they can join based on their security
Related Record Join

- The related records are specific to a field in the current record.

- If a field prompts against another record, you will see the related record displayed as a hyperlink to the right of the field.
Trouble Shooting Your Query

We will now go over some issues you may face if your query is not producing the output you are expecting.

Control Table

- You can have an issue when joining a Transaction Table to a Control Table.
- A Control Table stores information that controls how the applications (AP, AR, Projects, etc.) process data.
- Control Tables are identified by the **KEY Field of SETID**.
- The most commonly used SETID is **RIVCO**.
Control Tables

Examples:
- COMBO_DATA_TBL
- DEPT_TBL
- FUND_TBL
- RV_PROJ_ATTRIB6
- INV_Items
- MASTER_ITEM_TBL
- ITM_VENDOR
- MTCH_RULES
- VENDOR

Transaction Tables

- Transaction Tables Contain the actual data that users enter and access through the PS application pages.

- Transaction Tables Are Identified by KEY Fields other than SETID.

- The most commonly used KEY Field is BUSINESS_UNIT.
Transaction Tables

Examples:
- LEDGER
- ASSET
- ITEM_ACTIVITY
- BI_HDR
- PROJECT
- BU_ITEMS_INV
- REQ_HDR
- PO_HDR
- VOUCHER
Control vs Transaction Table Summary

- In order for a **Business Unit** to **process** **TRANSACTIONs**, it **must have** an associated **CONTROL** table.
- The **Business Unit** contains the actual data. (**Transaction Tables**)  
- The **SETID** contains the rules by which the data is processed. (**Control Tables**)  

When Joining Control & Transaction Tables

- When joining a **Control table** to a **Transaction table** users must be careful to select **compatible Key Fields** from each table.

  **Example:** Join **VENDOR** (Control) table to **VOUCHER** (Transaction) table.
Control Tables

Notice the Key Fields of SETID and VENDOR_ID for this record

Transaction Tables

Notice the Key Fields of BUSINESS_UNIT and VOUCHER_ID for this record
Joining Control & Transaction Tables

Notice that the KEY Fields are different in these two tables.

When Joining Control & Transaction Tables

Notice that PeopleSoft selects BUSINESS_UNIT in its Auto Join Criteria to link the VOUCHER (transaction) table to the VENDOR (control) table. This is because the BUSINESS_UNIT field is present on both the VENDOR table and the VOUCHER table. This must be adjusted because the BUSINESS_UNIT field on the VENDOR table is not compatible with the BUSINESS_UNIT field on the VOUCHER table.
Joining Control & Transaction Tables

To make this table join work you must edit the join on BUSINESS_UNIT. Click on the Edit Criteria button to bring up the Edit Criteria Properties Screen. Here click on the Magnifying Glass in Expression 1 to access the listing of all the tables in your query and their fields.

1. Change B.BUSINESS_UNIT in Expression 1 to A.SETID.
2. Now change Expression 2 in the same manner to read B.VENDOR_SETID.
Always use *KEY* fields as much as possible. Key Fields force the indices to be utilized.

Here VENDOR_ID and SET_ID are the *KEY* fields on the VENDOR table and they are being joined to compatible fields on the VOUCHER table.

**Other Common Errors When Joining Tables**

1. The order in which you join tables matters

   **Example:** Joining the VOUCHER to the PAYMENT table.

   The `PYMNT_VCHR_XREF` table *must be between* the two.
Other Common Errors When Joining Tables
VOUCHER – PYMNT_VCHR_XREF – PAYMENT

PAYMENT Table

PYMNT_VCHR_XREF Table

VOUCHER Table

Other Common Errors When Joining Tables
PAYMENT – PYMNT_VCHR_XREF – VOUCHER

PAYMENT Table

PYMNT_VCHR_XREF Table

VOUCHER Table
Other Common Errors When Joining Tables

2. Using the correct tables improves performance

Example: You want to know project information on certain vouchers

- Instinct is to use the VCHR_ACCTG_LINE table
  - Makes the query run an extraordinary long time
  - May timeout while processing
- Use the PROJ_RESOURCE table instead
  - Contains all the voucher and PO information
  - Query processes in a fraction of the time

Common Errors When Joining Tables

3. HST Tables – Tables with HST extensions in their names are History Tables and usually do not contain any data. Using these tables will usually return no data or will time out.

- Exception is RV_VCHR_APPR_HS table
Other Common Errors When Joining Tables

4. Financial Style (FS) Tables – Tables with FS extensions are not all identical to the basic PeopleSoft tables of the same name. Using these tables may return incorrect data, no data or will time out. It is best not to use these tables.

5. JRNL_HDR to JRNL_LN – When joining these two tables do not set the LEDGER field on each table to equal each other. The LEDGER field on the JRNL_HDR table is not populated. You must set the LEDGER_GROUP field on the JRNL_HDR table to equal the LEDGER field on the JRNL_LN table.
Query Operands

DISTINCT
- Using “DISTINCT” in a query causes extra processing time.
- Use “DISTINCT” only when absolutely necessary
- Do Not automatically add “DISTINCT” to all your queries.
- THINK B-4 you click “DISTINCT”

LIKE
- Using “LIKE” makes it impossible to use the appropriate index in that field.
- Causes a “Full Table Scan”.
- “LIKE” is very expensive and requires the system to work harder.
- May cause system timeouts.
- Try using “IN LIST” instead if possible.
Query Operands

(Continued)

**IN LIST** – When entering a long list of values the page will cut off the list so you cannot view all the values.

Click on **CUSTOMIZE PAGE** at the top right of the screen:
Query Operands In List

1. Click on RESTORE DEFAULTS
2. Click on OK

Page Customization

To define new tabbing order, select Clear Tabbing Order, then click here to include in desired essay. To rearrange tabbing order, select Remove from order, Move Up in order, or Move Down in order, then appropriate item to rearrange.

You can now see the entire list:
Scheduling a Query to Run

- You may choose to schedule queries so that they run at predefined times or on recurring schedules.
- Query Manager interacts with PeopleSoft Process Scheduler to enable you to schedule queries.
- To Schedule a query, you must submit a process request.
- The results of scheduled queries are routed to PeopleSoft Report Manager.
- You can even display the report in a PDF format.

Copying a Query

- This is probably the Absolute Best Feature of Query that we didn’t have in v7.5.
- The Query Manager allows you to copy a query from your list of queries to another’s list of queries.
- This function is extremely helpful in allowing a user to create a private query and then distribute it among other staff to use it.
Copying a Query

- You can only copy nonpublic (Private) queries to another user’s list of queries.
- If the target user does not have permission to access all of the records in a copied query, that query will not appear in the target user’s list of queries.
- Once permission has been granted, the query will appear in the list.
- Most user’s don’t have queries in Production but if you did, you can’t copy a query from Production into a user’s Reporting Environment.

This Prompt Box will appear when you Run the query.
Copying a Query

You have to let the person know and also the name of the query you copied.

Add a Query to Favorites

• Perform a Search of your Query
• Check the Box then go to the Action dropdown and select Add to Favorites
UPK for Query Training

UPK covers all the commonly used features of Query writing

- Riverside Query for Financials 8.1.0
  - Introduction
    - Application and Navigation of Queries
  - PeopleSoft Query Banks
    - Running an Existing Query Using Query Viewer
    - Running an Existing Query Using Query Manager
    - Editing Fields
    - Creating a Query
    - Translate Values
    - Downloading Queries to Excel and CSV Files
    - Submitting Process Requests
    - Making a Query Distinct
    - Retaining Queries
    - Deleting Queries
    - Copying Queries

- Selection Criteria
  - Summary of Combinations
  - Criteria Tab
  - Equal To
  - In List
  - Between
  - Like %
  - Like _
  - Boolean Expressions
  - Use of Parentheses

- Run Time Prompting
  - Run Time Prompts
  - Multiple Prompts
UPK for Query Training

- Defining Query Selection Criteria
- Entering Selection Criteria
- Specifying Effective Date Criteria
- Applying an Aggregate Function
- Creating a Query Using Having Criteria
- Advanced Query Options
  - Defining Expressions
  - Creating Record Hierarchy Joins
  - Creating Related Record Joins

Commonly Used Tables

PeopleSoft 8.8 Financials
OASIS Commonly Used Tables
and their Descriptions

<table>
<thead>
<tr>
<th>GREEN HIGHLIGHTED TABLES INDICATE CONTROL TABLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>GENERAL LEDGER Query Tables</td>
</tr>
<tr>
<td><strong>General Ledger</strong></td>
</tr>
<tr>
<td>COMBO DATA TEL Combo Edit Combinations</td>
</tr>
<tr>
<td>JRNL HEADER Journal Header Data</td>
</tr>
<tr>
<td>JNLNL UN Journal Line Data</td>
</tr>
<tr>
<td>Ledger Ledger Data (Actual)</td>
</tr>
<tr>
<td><strong>Commitment Control (KK)</strong></td>
</tr>
<tr>
<td>KK_BUDGET_HDR Budget Journal Header Data</td>
</tr>
<tr>
<td>KK_BUDGET_UN Budget Journal Line Data</td>
</tr>
<tr>
<td>KK_CNM_VALUE Commit Control Funding Source</td>
</tr>
<tr>
<td>KK_NMBR_JKDB Ledger Data</td>
</tr>
<tr>
<td>Ledger Ledger Data</td>
</tr>
<tr>
<td>RV_RDG_XLT_ACCT RV Budget Translation ACCT</td>
</tr>
</tbody>
</table>

County of Riverside ■ Office of the Auditor-Controller
Query Planning Guide

Planning

- Decide What fields you want to display
- What tables are involved (where are fields stored)?
- Determine the focus of the results
- What are the relationships between tables?: Determine join types
- What Criteria or other factors are required?
- What calculations (Aggregates) are required?

Building

- Select Record of Focus
- Join in all other tables (one at a time)
  - Look for predefined first, but beware of views that may limit data access
    - For any Joins – establish relationship on all key items of new table
      - Criteria: B. Field = A. Field
      - May require multiple lines of Criteria, one for each Key Item
- Select Fields for output
Query Planning Guide

Building (Continued)

- Select Order By for the sort fields
- Select XLAT translations
- Update Headings
- Select Criteria
- Select Aggregates
- Select Having Criteria

What Next

- Go Back to your office and try to edit and run some queries
- Build a Query from scratch
- Compare it to Simpler
- Talk to co-workers, we have a lot of people that are very proficient in Query
- The more you work with Queries the easier they become to understand
Questions

The End