



## **Query Manager Basics**

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

### **Query Manager**

Query Manager provides you with more options when working with queries.

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

Favorites -	Main Menu -> Reporting Tools -> Query -> Query Manager	
	E.	Home
Query Mana	ger	
Enter any inform	nation you have and click Search. Leave fields blank for a list of all values.	
Find	an Existing Query   Create New Query	
*Sea	rch By Query Name begins with	
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Query Manager defaults to finding an existing query. You can use the basic search to enter the beginning portion of the query name. You can also use the Advanced Search feature.

### **Advanced Search**

The Advanced Search gives you more options when searching. For example, let's say you know the query name has "OPEN\_TRANS" in it, but you can't remember the entire name. You can enter "OPEN\_TRANS" in the Query Name search field and change "begins with" to "contains".



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Enfer any information you have and cli	ck Search. Leave ne	eids blank for a list of all values.						
Find an Existing Query   C	reate New Query							
Query Name	begins with	OPEN_TRANS						
Description	< <=							
Uses Record Name	= >							
Uses Field Name	>=							
Access Group Name	begins with between		۹,					
Folder Name	contains in							
Owner	not =	•						
When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.								
Search Clear	Basic Search	h						

By using the word "contains" when searching, you receive more results without having to enter the exact name.

### **Retrieving Query Results**

Query Manager allows you to run a query to HTML or Excel. Below are the results after searching "BOR\_AM\_ASSET" using basic search.

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	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		- begin	begins with BOR_AM_ASSET								
	Search	Advanced Search	-									
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	*Folder View All Folders											
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You can run the query to HTML by clicking **HTML** link for the selected query. This will run in a new window. You can then download these files by clicking the appropriate link. Close the window when you





are finished. You can also run a query directly to Excel. To do this, simply click **Excel** link of the selected query.

Quer	y Manager								
Enter	any information you have	and click Search. Leave fi	elds blank for a list of a	all values.					
	Find an Existing Qu	ery   Create New Query							
	*Search By Query Name • be Search Advanced Search		begins with	BOR_AM_ASSET					
(			-						
	Search Re	esults							
	*Folder View All	Folders	-						
(	Check All U	ncheck All	*Action	Choose		Go	]		
Que	Query			Add to Favorit	tes	d   View /	All   🖾	Ш ғ	First 🔳 1-5 of 5 🕨 Last
Selec	Select Query Name			Copy to User Delete Selected		Run to HTML	Run to Excel	Run to XML	Schedule
	BOR_AM_ASSET_AP_TO_AM_LOAD Assets w/ Recv ID to load		Move to Folder Rename Selected		HTML	Excel	XML	Schedule	
	BOR_AM_ASSET_LIS	TING Asset Lis	ting for Auditors	Public	Ed	t HTML	Excel	XML	Schedule
	BOR_AM_ASSET_LOO	CATION ASSET_I	_OCATION count	Public	Ed	it HTML	Excel	XML	Schedule
	BOR_AM_ASSET_NB	V_TBL ASSET_I	NBV_TBL summed	Public	Ed	it HTML	Excel	XML	Schedule

You can also use the dropdown Action menu for other options.

The dropdown Action menu provides options for you to add the query to your favorites, copy the query, delete the query, move the query, or rename the query. Keep in mind, you should never delete or rename a public query that you did not create.

More information on saving a query as a favorite, editing a query and scheduling a query is available in subsequent query job aids.