

Scheduling a Query

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.

You can schedule a query in both Query Viewer and Query Manager. The following steps will guide you through scheduling a query in Query Manager.

Query Manager

Navigation: **Main Menu > 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 BOR_AM_OPEN_TRANS

[Advanced Search](#)

Search Results

*Folder View -- All Folders --

*Action -- Choose --

Query					Personalize	Find	View All	First 1 of 1 Last		
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	
<input type="checkbox"/>	BOR_AM_OPEN_TRANS_CHECK	ID transactions not processed	Public		Edit	HTML	Excel	XML	Schedule	

Scheduling a Query

Scheduling a query allows you to set a query to run at a specific time and then you are able to retrieve the results at your convenience.

You will begin by searching for the query you would like to schedule. Below are the results after searching for **BOR_AM_OPEN_TRANS_CHECK**.

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 begins with

[Advanced Search](#)

Search Results

*Folder View

*Action

Query									
	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input type="checkbox"/>	BOR_AM_OPEN_TRANS_CHECK	ID transactions not processed	Public		Edit	HTML	Excel	XML	Schedule

Click the **Schedule** link to begin the scheduling process.

Scheduled Query

[Find an Existing Value](#) [Add a New Value](#)

Private Query:

Query Name:

Run Control ID:

[Find an Existing Value](#) | [Add a New Value](#)

You will notice the query name populates automatically. The system will require you to enter a new Run Control ID the first time you schedule a query.

Enter a Run Control ID. Click **Add**.

Scheduled Query

Private Query:

Query Name:

Run Control ID:

[Find an Existing Value](#) | [Add a New Value](#)

Select your Business Unit and Date range. Click **OK** and the **Add**.

Scheduled Query

Private Query:

Query Name:

Run Control ID:

[Find an Existing Value](#) | [Add a New Value](#)

BOR_AM_OPEN_TRANS_CHECK

Unit:

From Acctg Date:

To Acctg Date:

Calendar

May 2015

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Enter a description of the query.

Schedule Query

[Run Control ID ASSETQUERY](#)
[Report Manager](#)
[Process Monitor](#)

Query Name:

*Description:

[Update Parameters](#)

Prompt Name	Value
BUSINESS_UNIT	<input type="text" value="98000"/>
ACCOUNTING_DT	<input type="text" value="2014-09-16"/>
ACCOUNTING_DT	<input type="text" value="2015-05-14"/>

Click **OK**. You will be routed to the Process Scheduler Page. This is where you setup the time for the query to run.

Process Scheduler Request

[Help](#)

User ID Run Control ID

Server Name

Recurrence

Time Zone

Run Date

Run Time

[Process List](#)

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web	TXT	Distribution

Select the **Run Date** and **Run Time** you want the query to run. If you want this scheduled query to occur again, make a selection from the **Recurrence** dropdown list. Leave the **Server Name** blank. The system will select the appropriate server for this query to run on.

Next, select the format you want your query to run to. Click **OK** to schedule the query. You will be returned to the Query Manager page.

Process Scheduler Request Help

User ID: OIITDUREN Run Control ID: ASSETQUERY

Server Name: Run Date: 05/14/2015

Recurrence: Run Time: 4:00:00PM Reset to Current Date/Time

Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web	XLS	Distribution

OK Cancel

To view how a query has been scheduled to run in the future, go to the Process Monitor.

Navigation: PeopleTools > Process Scheduler > Process Monitor

Process List Server List

View Process Request For

User ID: OIITDUREN Type: Last: 1 Hours Refresh

Server: Name: Instance: to:

Run Status: Distribution Status: ☒ Save On Refresh

Process List Personalize Find View All First 1 of 1 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	7155974		Application Engine	PSQUERY	OIITDUREN	05/14/2015 4:00:00PM EDT	Success	Posted	Details

Save Notify

[Process List](#) [Server List](#)

In the Process Monitor, the query will show a Run Status of “Queued” until it is scheduled to run. Once it runs, the status will show “Success” and the Distribution Status will be “Posted”. See subsequent job aids for directions on how to retrieve results for a scheduled query.