

# Selecting a Primary Record

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. This job aid is designed to assist users in selecting a new record.

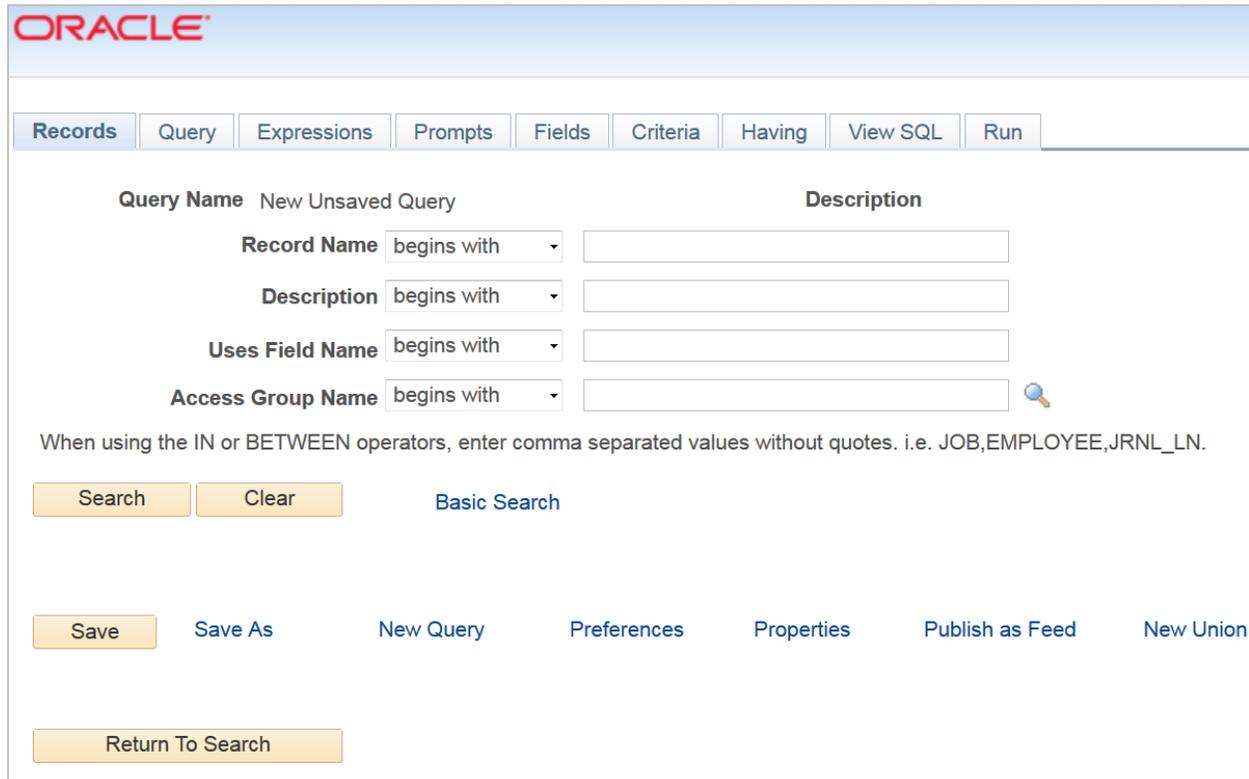
## Query Manager

You will create new queries using Query Manager.

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

You can use basic search page or advanced search page to select primary record. Basic search allows users to search for one field with the search criteria of “begins with”.

The advanced search page provides users with different options for searching for Record Name, Description, Uses Field Name, and/or Access Group Name. Also, you can search for items with a “contains” clause and not just “begins with”.



**ORACLE**

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Query Name New Unsaved Query Description

Record Name begins with

Description begins with

Uses Field Name begins with

Access Group Name begins with  🔍

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL\_LN.

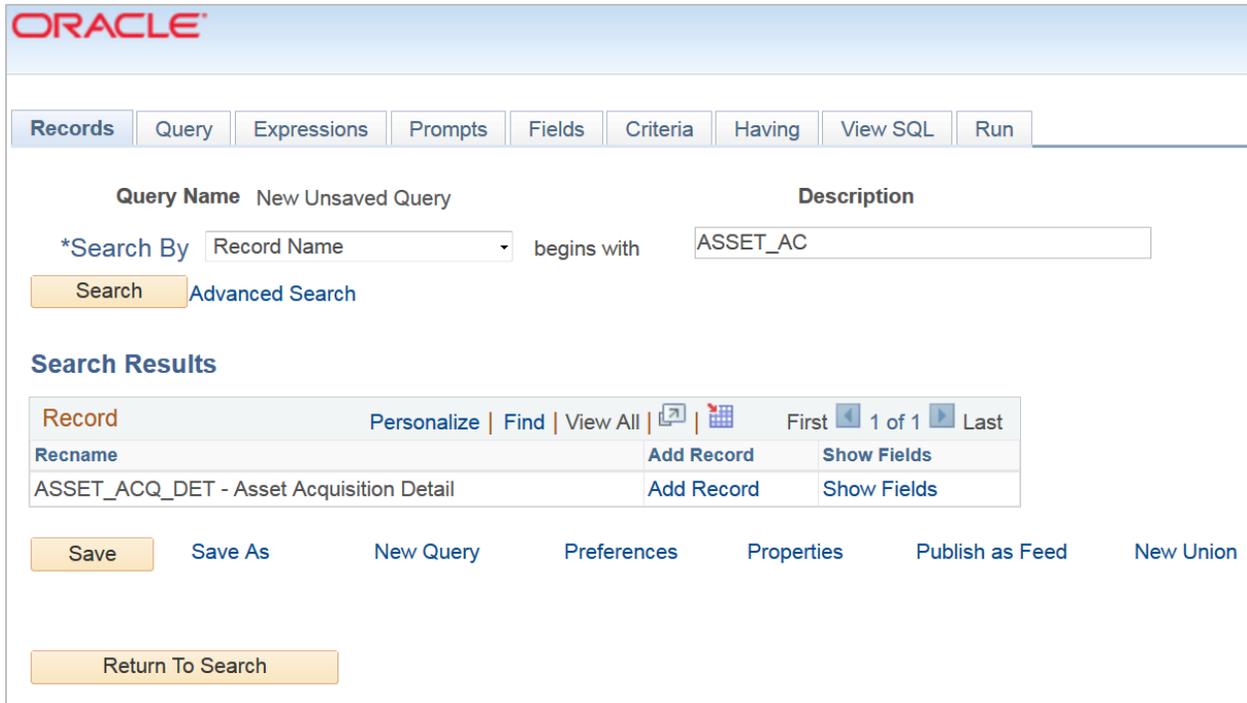
Search Clear Basic Search

Save Save As New Query Preferences Properties Publish as Feed New Union

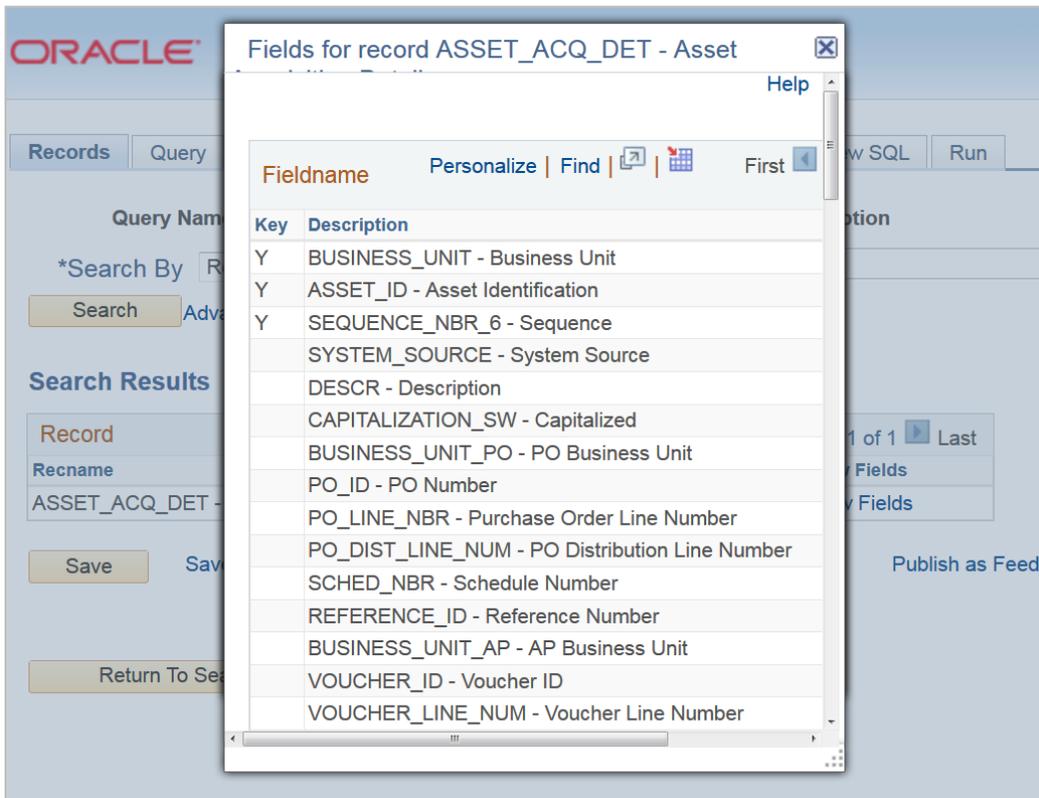
Return To Search

The following steps will guide users in selecting a primary record through the basic search page.

In Query Manager, click **Create New Query**. Enter record name into search field. Remember, once you click **Search**, everything that begins with what is entered in this field will be displayed. The more info you enter in the search field, the more specific the results.

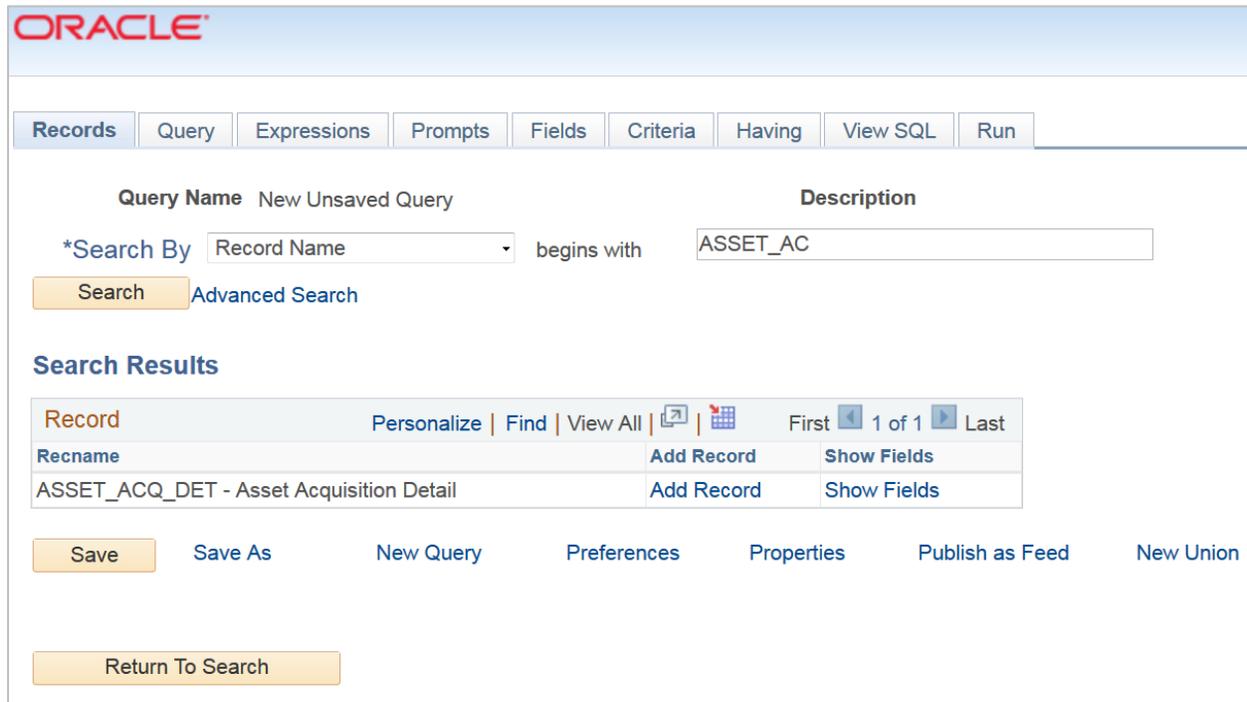


Click **Show Fields** to view the fields for the record.



Click the **x** in the top right corner of the list or the **Return** bottom at the bottom.

Click **Add Record** to add the selected record.



**ORACLE**

Records | Query | Expressions | Prompts | Fields | Criteria | Having | View SQL | Run

Query Name: New Unsaved Query      Description:

\*Search By: Record Name (dropdown) begins with: ASSET\_AC

Search | Advanced Search

**Search Results**

Record	Personalize	Find	View All	First	1 of 1	Last
Recname						
ASSET_ACQ_DET - Asset Acquisition Detail						

[Add Record](#)    [Show Fields](#)  
[Add Record](#)    [Show Fields](#)

[Save](#)    [Save As](#)    [New Query](#)    [Preferences](#)    [Properties](#)    [Publish as Feed](#)    [New Union](#)

[Return To Search](#)

The system will take you to the **Query** tab after adding a primary record. This is where you will select the fields you want displayed in your query. The remaining steps of creating a query will be covered in subsequent job aids.