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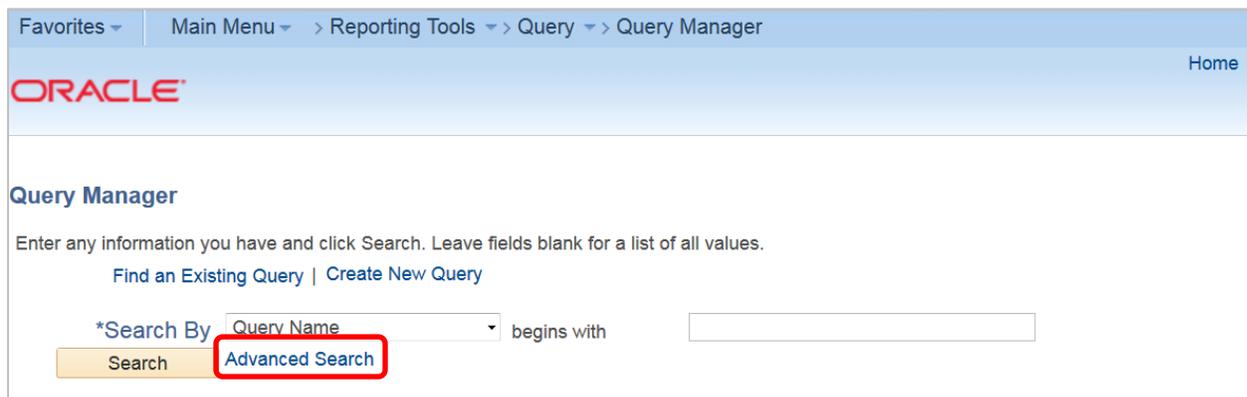
PeopleSoft Financials 9.2 Web Query is a graphical tool that allows you to easily retrieve specific data from the PeopleSoft system. The data is retrieved by running predefined or custom queries.

Query Manager

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

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

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".

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

Query Name	begins with ▾	OPEN_TRANS
Description		
Uses Record Name		
Uses Field Name		
Access Group Name		🔍
Folder Name		
Owner		▾

Dropdown options shown:
<
<=
=
>
>=
begins with
between
contains
in
not =

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

Search   Clear   Basic Search

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.

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_ASSET]

Search   Advanced Search

Search Results

*Folder View [-- All Folders -- ▾]

Check All   Uncheck All   *Action [-- Choose -- ▾] Go

Query								
						Personalize	Find	View All	🔲	🔳	First ◀ 1-5 of 5 ▶ Last

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
☐	BOR_AM_ASSET_AP_TO_AM_LOAD	Assets w/ Recv ID to load	Public		Edit	HTML	Excel	XML	Schedule
☐	BOR_AM_ASSET_LISTING	Asset Listing for Auditors	Public		Edit	HTML	Excel	XML	Schedule
☐	BOR_AM_ASSET_LOCATION	ASSET_LOCATION count	Public		Edit	HTML	Excel	XML	Schedule
☐	BOR_AM_ASSET_NBV_TBL	ASSET_NBV_TBL summed	Public		Edit	HTML	Excel	XML	Schedule
☐	BOR_AM_ASSET_NO_TAG_NUMBER	Assets Missing Tag Numbers	Public		Edit	HTML	Excel	XML	Schedule

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.

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

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_ASSET]

[Search] Advanced Search

Search Results

*Folder View [-- All Folders -- ▾]

[Check All] [Uncheck All]   *Action [-- Choose -- ▾] [Go]

Query						First ◀ 1-5 of 5 ▶ Last

-- Choose --
Add to Favorites
Copy to User
Delete Selected
Move to Folder
Rename Selected

Select	Query Name	Descr			Run to HTML	Run to Excel	Run to XML	Schedule
☐	BOR_AM_ASSET_AP_TO_AM_LOAD	Assets w/ Recv ID to load			HTML	Excel	XML	Schedule
☐	BOR_AM_ASSET_LISTING	Asset Listing for Auditors	Public	Edit	HTML	Excel	XML	Schedule
☐	BOR_AM_ASSET_LOCATION	ASSET_LOCATION count	Public	Edit	HTML	Excel	XML	Schedule
☐	BOR_AM_ASSET_NBV_TBL	ASSET_NBV_TBL summed	Public	Edit	HTML	Excel	XML	Schedule
☐	BOR_AM_ASSET_NO_TAG_NUMBER	Assets Missing Tag Numbers	Public	Edit	HTML	Excel	XML	Schedule

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.