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”.

Job Aid: Query Manager Basics
GeorgiaFIRST Financials

1 | Page
05.29.15
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.

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.

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.