QUERY VIEWER BASICS

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

Query Viewer is a read-only reporting tool that allows users to easily retrieve specific data from the PeopleSoft system. Query Viewer allows users to:

- Search for a query using the basic or advanced search functions
- Run a query and display results in a new browser window (either HTML or Excel)
- Download the results to an Excel spreadsheet or a CSV text file
- Print a query
- Schedule a query to run at a predetermined time

Users are not able to edit queries in Query Viewer but instead can run pre-defined queries that are BOR-delivered, institution-developed, or private queries created and saved by a user.

A query is a request for data results from the source database. As used in PeopleSoft Financials, queries are run as user-defined reports. A public query is one that anyone can run. A private query is one that only the query’s creator can access. If users run a public query and do not receive any results, it could be a result of security limitations or that prompted criteria did not result in any valid results.

Searching for a Pre-Defined Query

Navigation: Reporting Tools > Query > Query Viewer

When searching for a pre-defined query, remember no spaces exist in query names. Also, the more details entered into the search field, the more exact the user has to be. If a query name is misspelled, users may not get the results they are looking for.
For example, when searching for the “BOR_AM_OPEN_TRANS_CHECK” query if a user cannot remember the exact name of a query, a portion of the query name such as “BOR_AM_OPEN” can be entered in the search field. The system will search and provide results for every query beginning with “BOR_AM_OPEN.” The search results include the “BOR_AM_OPEN_TRANS_CHECK” query as shown below.

Users can find queries specific to each module area by navigation to the documentation index page of the GeorgiaFIRST Financials website.

**Searching with Advanced Criteria**
The Advanced Search link gives more options when searching. Users can specify specific fields or records and adjust the matching criteria for any search fields.

For example, if a user does not know the entire query name but does know that the query contains the phrase “OPEN_TRANS,” then the user can change the search criteria from “begins with” to “contains” in the Query Name search field as shown below.
By using the word “contains” when searching rather than “begins with,” the user receives all results that include the phrase “OPEN_TRANS” as shown below:
Retrieving Query Results

Users can run the query to HTML to view results directly in a browser or export to Excel. To do this, use the "HTML" and/or "Excel" links to the right of the query. Both options will bring up a new window with query results or a set of prompts if the query is set up to request user prompts as shown below:

User prompts vary from query to query, but must be filled in prior to clicking the View Results button. Also, some prompts allow for wildcards to stand in for one or more unknown characters as shown below:

The % character acts as a wildcard for multiple characters. In the above example, Ledger looks for any possible results (ORG_BD, DETAIL_EN, etc.). The criteria set for Account, however, will look for any accounts starting with 553, including 553201 and 553123.
The _ (underscore) character acts as a wildcard for exactly one character. In the above example, the Dept criteria looks for any department starting with 99 and ending with 0000. In this example, that would include departments 9910000, 9920000, etc.

**Saving a Query to Favorites**
In Query Viewer, search results include an “Add to Favorites” link.

![Query Viewer screenshot](image)

Clicking the Favorite link adds the query to Favorites, making it appear on the Query Viewer page without requiring any search criteria as shown below:

![Query Viewer screenshot](image)

Favorites can be removed individually by clicking the “-” button in the Remove column, or all favorites can be removed by clicking the Clear Favorites List button.
Scheduling a Query

Scheduling a query allows users to set a query to run at a specific time and to set recurrence options. Users schedule queries through the Schedule Query menu selection or directly on the Query Viewer page.

The Process Scheduler Request page enables users to set the run date and time, how often the process runs, output type, and format. Users can then go to the Report Manager to see query results.

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

Using the above instructions on Searching for a Pre-Defined Query, find a query to schedule. After the desired query is visible in search results, click the **Schedule** link to begin the scheduling process.

Clicking the Schedule link will open the Scheduled Query page that lists query attributes including whether the query is a Private Query and the Query Name. Users must enter a Run Control ID for the selected query and schedule settings.
Click the Add button after filling in the Run Control ID. If the query is set up to request parameters, a window will open where the user can enter these parameters. After filling in prompted parameters, click the OK button.
The next page lists the selected Run Control ID, Query Name, and has a field where the user can input a Description. Below these fields, the page will list any prompted parameters filled in during the previous step. If parameters need adjusted, the Update Parameters link will open the window from the previous step again to allow adjusting parameters.

**Schedule Query**

<table>
<thead>
<tr>
<th>Run Control ID</th>
<th>TEST</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Query Name</strong></td>
<td>BOR_AM_OPEN_TRANS_CHECK</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>ID transactions not processed</td>
</tr>
</tbody>
</table>

Update Parameters

<table>
<thead>
<tr>
<th>Prompt Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUSINESS_UNIT</td>
<td>51000</td>
</tr>
<tr>
<td>ACCOUNTING_DT</td>
<td>2021-08-01</td>
</tr>
<tr>
<td>ACCOUNTING_DT</td>
<td>2021-09-01</td>
</tr>
</tbody>
</table>

Click OK. The system navigates to the Process Scheduler Request page.

If the query is being run as a scheduled query because the expected results set is too large for running to HTML and should be run immediately, Click OK to continue. If the query is being run as a scheduled query to set up a recurring schedule, Adjust the run Date and Run Time options and select a suitable option from the Recurrence field before clicking OK. The Server name should not be adjusted.
The system will navigate back to the query search page. To view query results, navigate to the Process Monitor to review process run status. The navigation is: PeopleTools > Process Scheduler > Process Monitor

In the Process Monitor, the query shows a Run Status of "Queued" until it is scheduled to run. Once it runs, the Run Status shows "Success" and the Distribution Status will be "Posted." Query results will be available through the Details link.

Queries scheduled to run on a recurring schedule can also be viewed through Report Manager. The navigation is PeopleTools > Reporting Tools > Report Manager. Query results will be available through the link in the Report column.