

## 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

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

Navigation: Reporting Tools > Query > Query Viewer

**Query Viewer**

Enter any information you have and click Search. Leave fields blank for a list of all values.

\*Search By  begins with

[Advanced Search](#)

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.

**Query Viewer**

Enter any information you have and click Search. Leave fields blank for a list of all values.

\*Search By  begins with

[Search](#) [Advanced Search](#)

**Search Results**

\*Folder View

**Query**

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
BOR_AM_OPEN_PERIOD_CHECK	View AM Open Periods	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
BOR_AM_OPEN_TRANS_CHECK	ID transactions not processed	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>

### 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.

### Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

Query Name	<div style="border: 1px solid gray; padding: 2px;">             begins with ▾              &lt;              &lt;=              =              &gt;              &gt;=              begins with              between  <b>contains</b>              in              not =              begins with ▾           </div>	<input style="width: 95%;" type="text" value="OPEN_TRANS"/> <input style="width: 95%;" type="text"/> <input style="width: 95%;" type="text"/>
Description		<input style="width: 95%;" type="text"/>
Uses Record Name		<input style="width: 95%;" type="text"/>
Uses Field Name		<input style="width: 95%;" type="text"/>
Access Group Name		<input style="width: 95%;" type="text"/>
Folder Name		<input style="width: 95%;" type="text"/>
*Query Type	=	<input style="width: 95%;" type="text" value="User"/> ▾
Owner	=	<input style="width: 95%;" type="text"/> ▾

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

Basic Search

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:

**Search Results**

\*Folder View

Query

1-10 of 10 | View All

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
360_CHA_OPEN_TRANS	OPEN TRANS	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
360_CHA_OPEN_TRANS_V2		Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
360_DC_OPEN_TRANS	OPEN TRANS	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
510_CA_AM_OPEN_TRANS_CHECK	Asset open transaction	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
840_AM_OPEN_TRANS	Current Open Trans	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
ASSET_OPEN_TRANS_ROWS	Asset Open Transactions	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
BOR_AM_OPEN_TRANS_CHECK	ID transactions not processed	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
F270_OPEN_TRANS	OPEN_TRANS count by book	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
FINQA_PURGE_OPEN_TRANSACTION	PS_OPEN_TRANS	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
FINQA_UPDATE_DELETE_OPEN_TRANS	PS_OPEN_TRANS	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>

## Retrieving Query

### Results

**Query Viewer**

Enter any information you have and click Search. Leave fields blank for a list of all values.

\*Search By  begins with

**Search Results**

\*Folder View

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
BOR_AM_OPEN_PERIOD_CHECK	View AM Open Periods	Public		HTML	Excel	XML	Schedule	Favorite
<b>BOR_AM_OPEN_TRANS_CHECK</b>	ID transactions not processed	Public		<b>HTML</b>	<b>Excel</b>	XML	Schedule	Favorite

**BOR\_AM\_OPEN\_TRANS\_CHECK - ID transactions not processed**

Unit

From Acctg Date

To Acctg Date

Row	Unit	Asset ID	Book Name
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**BOR\_KK\_LEDGER\_ACTIVITY - KK Ledger Activity with Prompt**

Ledger

Unit

Account

Dept

Fund

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

**Query Viewer**

Enter any information you have and click Search. Leave fields blank for a list of all values.

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[Advanced Search](#)

**Search Results**

\*Folder View

**Query**

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BOR_AM_OPEN_TRANS_CHECK	ID transactions not processed	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>

**Query Viewer**

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\*Search By  begins with

[Advanced Search](#)

**My Favorite Queries**

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Remove
BOR_AM_OPEN_TRANS_CHECK	ID transactions not processed	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<input type="button" value="-"/>

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.

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[Search](#) [Advanced Search](#)

**Search Results**

\*Folder View

**Query**

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BOR_AM_OPEN_TRANS_CHECK	ID transactions not processed	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>

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.

## Scheduled Query

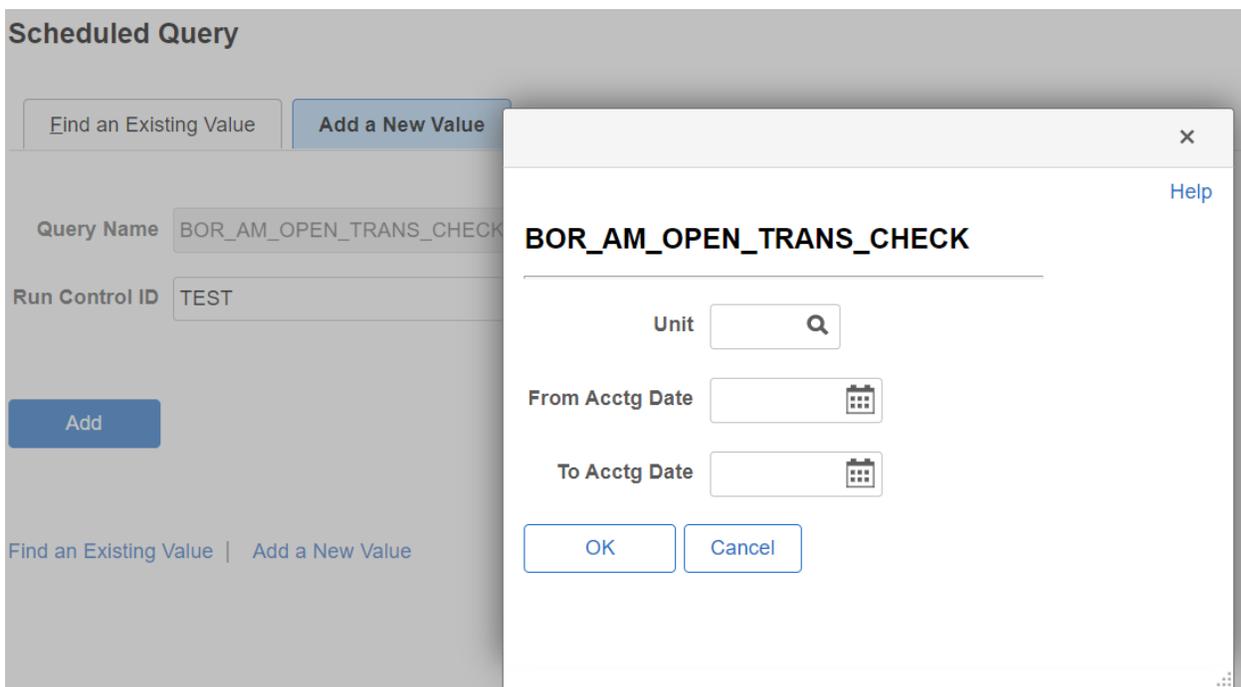
---

Query Name

Run Control ID

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

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 screenshot shows the 'Scheduled Query' interface with a modal dialog box open. The dialog box title is 'BOR\_AM\_OPEN\_TRANS\_CHECK'. It contains the following fields:

- Unit:  with a magnifying glass icon.
- From Acctg Date:  with a calendar icon.
- To Acctg Date:  with a calendar icon.

At the bottom of the dialog are 'OK' and 'Cancel' buttons. The background interface shows the 'Run Control ID' field filled with 'TEST' and the 'Add' button highlighted.

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**

Run Control ID    TEST

[Report Manager](#)

[Process Monitor](#)

Query Name    BOR\_AM\_OPEN\_TRANS\_CHECK

\*Description    ID transactions not processed

[Update Parameters](#)

Prompt Name	Value
BUSINESS_UNIT	51000
ACCOUNTING_DT	2021-08-01
ACCOUNTING_DT	2021-09-01

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.

Drag to move Help

User ID  Run Control ID TEST

---

Server Name  Run Date 09/01/2021

Recurrence  Run Time 9:56:27AM

Time Zone

**Process List**

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

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.

**View Process Request For**

User ID  Type  Last  5 Days

Server  Name  Instance From  Instance To  [Report Manager](#)

Run Status  Distribution Status   Save On Refresh

**Process List**

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	15136565		Application Engine	PSQUERY	PLB...	09/01/2021 9:56:27AM EDT	Success	Posted	<a href="#">Details</a>

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.

- List
- Explorer
- Administration
- Archives

**View Reports For**

Folder  Instance  to

Name  Created On  Last  1 Days

**Reports**

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 ID transactions not processed	ID TRANSACTIONS NOT PROCESSED	General	09/01/21 9:58AM	13965026	15136565