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”.

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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”.

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.

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.