

PeopleSoft Query Basics and Best Practices

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Agenda

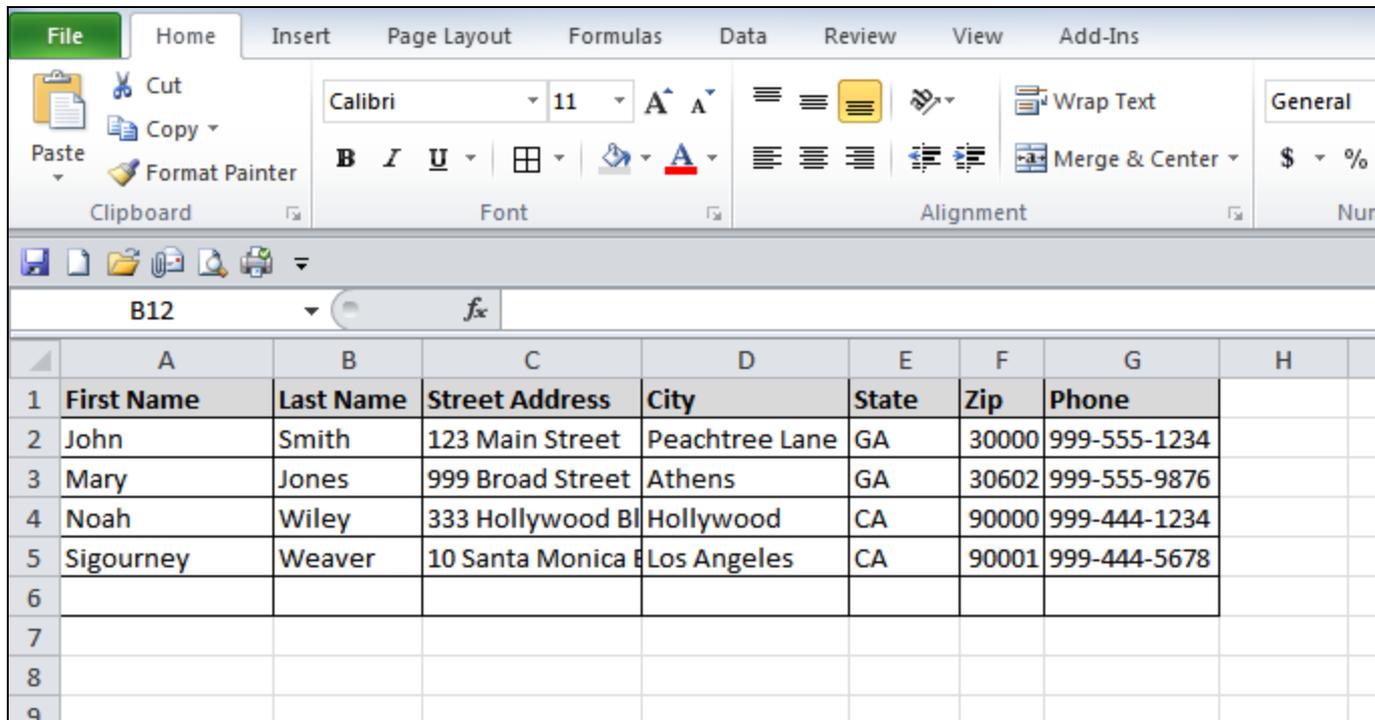
- Overview of PeopleSoft Query
- Best Practices
- Training Resources

PeopleSoft Query

- An end-user reporting tool that allows you to retrieve information from the PeopleSoft database tables.
- Instead of writing code (SQL statements), you use a graphical user interface to extract the precise information that you are looking for.

Data Basics

- What is a Table or Record
 - A record is a collection of data items



The screenshot shows the Microsoft Excel interface with a table containing five records. The ribbon is set to the 'Home' tab, and the 'Font' and 'Alignment' groups are visible. The table has the following data:

	A	B	C	D	E	F	G	H
1	First Name	Last Name	Street Address	City	State	Zip	Phone	
2	John	Smith	123 Main Street	Peachtree Lane	GA	30000	999-555-1234	
3	Mary	Jones	999 Broad Street	Athens	GA	30602	999-555-9876	
4	Noah	Wiley	333 Hollywood Bl	Hollywood	CA	90000	999-444-1234	
5	Sigourney	Weaver	10 Santa Monica B	Los Angeles	CA	90001	999-444-5678	
6								
7								
8								
9								

Unit: 98000 Journal ID: AP00049766 Date: 07/29/2008

Long Description: AP Accrual

*Ledger Group: ACTUALS Auto Generate Lines

Ledger: Adjusting Entry: Non-Adjusting Entry

*Source: AP Fiscal Year: 2009

Reference Number: Period: 1

SJE Type: ADB Date: 07/29/2008

Journal Class: Save Journal Incomplete Status

Transaction Code: Autobalance on 0 Amount Line

[Currency Defaults: USD // 1](#)

Reversal: Do Not Generate Reversal [Commitment Control](#)

Unit: 98000 Journal ID: AP00049766 Date: 07/29/2008 *Process: Edit Journal

[Template List](#) [Search Criteria](#) Errors Only Line: 10

Select	Line	SpeedType	Account	Fund	Dept	Program	Class	Project	Bud Ref	Budget Date	Amount
<input type="checkbox"/>	1		742105	10000	1711000	16300	11000		2009	07/29/2008	70.00
<input type="checkbox"/>	2		742105	10000	1212100	16100	11000		2009	07/29/2008	35.00
<input type="checkbox"/>	3		211000	10000	1711000	16300	11000		2009	07/29/2008	-70.00
<input type="checkbox"/>	4		211000	10000	1212100	16100	11000		2009	07/29/2008	-35.00

Totals		Personalize Find View All <input type="button" value="x"/> <input type="button" value="u"/> First 1 of 1 Last	
Unit	Total Lines	Total Debits	Total Credits Journal Status Budget Status
98000	4	105.00	105.00 P v

- Journal Header

Header | Lines | Totals | Errors | Approval

Unit: 98000 Journal ID: AP00049766 Date: 07/29/2008

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[Currency Defaults: USD // 1](#)

Reversal: Do Not Generate Reversal [Commitment Control](#)

- PS_JRNL_HEADER record

Records | Query | Expressions | Prompts | Fields | Criteria | Having | View SQL | Run

Unit = 98000,Journal ID=AP00049766

[View All](#) | [Rerun Query](#) | [Download to Excel](#) | [Download to XML](#) First

	Unit	Journal ID	Date	Year	Period	Ledger Grp	Lines	Debits	Credits	Source	Errors	Budget Status	Status	Posted	Us
1	98000	AP00049766	07/29/2008	2009	1	ACTUALS	4	105.000	105.000	AP	V	V	P	07/30/2008	WN

Header	Lines	Totals	Errors	Approval							
Unit: 98000	Journal ID: AP00049766	Date: 07/29/2008	*Process: Edit Journal	Process							
Template List	Search Criteria	<input type="checkbox"/> Errors Only	Line: 10								
Lines											
Select	Line	SpeedType	Account	Fund	Dept	Program	Class	Project	Bud Ref	Budget Date	Amount
<input type="checkbox"/>	1		742105	10000	1711000	16300	11000		2009	07/29/2008	70.00
<input type="checkbox"/>	2		742105	10000	1212100	16100	11000		2009	07/29/2008	35.00
<input type="checkbox"/>	3		211000	10000	1711000	16300	11000		2009	07/29/2008	-70.00
<input type="checkbox"/>	4		211000	10000	1212100	16100	11000		2009	07/29/2008	-35.00
Totals											
Unit	Total Lines	Total Debits		Total Credits		Journal Status	Budget Status				
98000	4	105.00		105.00		P	V				

PS_JRNL_LN record

Records	Query	Expressions	Prompts	Fields	Criteria	Having	View SQL	Run						
Unit = 98000,Journal ID=AP00049766														
View All Rerun Query Download to Excel Download to XML														
	Unit	Journal ID	Date	Line #	Ledger	Account	Dept	Fund	Class	Program	Bud Ref	Budget Period	Project	Amount
1	98000	AP00049766	07/29/2008	1	ACTUALS	742105	1711000	10000	11000	16300	2009	2009		70.000
2	98000	AP00049766	07/29/2008	2	ACTUALS	742105	1212100	10000	11000	16100	2009	2009		35.000
3	98000	AP00049766	07/29/2008	3	ACTUALS	211000	1711000	10000	11000	16300	2009	2009		-70.000
4	98000	AP00049766	07/29/2008	4	ACTUALS	211000	1212100	10000	11000	16100	2009	2009		-35.000

PS_JRNL_HEADER

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Unit = 98000,Journal ID=AP%

View All | Rerun Query | Download to Excel | Download to XML

First 1-100 of 3152

	Unit	Journal ID	Date	Year	Period	Ledger Grp	Lines	Debits	Credits	Source	Errors	Budget Status	Status	Posted	
1	98000	APPEXREC01	01/31/2002	2002	7	APPROP	0	0.000	0.000	UPG	V	V	P		UP
2	98000	APPEXREC01	04/30/2002	2002	10	APPROP	0	0.000	0.000	UPG	V	V	P		UP
3	98000	AP00048843	07/15/2008	2009	1	ACTUALS	11	461.700	461.700	AP	V	V	P	07/16/2008	NT
4	98000	AP00048844	07/31/2008	2009	1	ACTUALS	10	461.700	461.700	AP	V	V	P	07/16/2008	NT
5	98000	AP00048860	07/16/2008	2009	1	ACTUALS	99	976456.270	976456.270	AP	V	V	P	07/16/2008	NT
6	98000	AP00048861	07/16/2008	2009	1	ACTUALS	92	976456.270	976456.270	AP	V	V	P	07/16/2008	NT
7	98000	AP00049056	07/16/2008	2009	1	ACTUALS	3	43.790	43.790	AP	V	V	P	07/17/2008	NT
8	98000	AP00049110	07/17/2008	2009	1	ACTUALS	138	1877516.430	1877516.430	AP	V	V	P	07/17/2008	NT
9	98000	AP00049111	07/17/2008	2009	1	ACTUALS	126	1877560.220	1877560.220	AP	V	V	P	07/17/2008	NT

Table and Field Names

- Look at an existing query
- List of Commonly Used Tables (Records)
- ERDs
Entity Relationship Diagram

<http://www.usg.edu/gafirst-fin/training>

<http://www.usg.edu/gafirst-fin/documentation>

Table and Field Names

EXISTING QUERIES

- Look at an existing query in Query Manager or Query Viewer
 - Module Specific Queries naming convention
 - BOR_AP_%
 - BOR_GL_%
 - BOR_EX_%
 - Etc.

Table and Field Names

EXISTING QUERIES

- See Module Specific Job Aids
 - Accounts Payable Inquiries, Queries, and Reports
 - General Ledger and Commitment Control Queries
 - PeopleSoft v9.2 Budget Prep Queries and Reports
 - Etc.

Security Roles

- **BOR_PT_QRY_ALLACGRPS**: You must have this role in order to access the records you need to query.
- And 1 of the following roles (**Only one**)
 - **BOR_PT_QRY_VIEWER** (Gives a user access to run public queries).
 - **BOR_PT_QRY_PRIVATE** (Gives a user access to create private queries only, run private and public queries.)
 - **BOR_PT_QRY_PUBLIC** (Gives a user access to create private and public queries, run private and public queries.)

Security Roles

- Other roles that may be necessary:
 - **BOR_QRY_SENSDATA** (gives query access to sensitive data records that may contain things such as SSN#, emplids, etc.)
 - **BOR_PT_QRY_BUDPREP** (Gives access to the budget prep records)
 - **BOR_QRY_XXXXX** (each institution has a query specific role that allows access to their banner views)
 - **BOR Reconciliation User** provides access to ADP data (Limit to those only working with ADP data).

Navigation

- Reporting Tools > Query > Query Manager
or
- Reporting Tools > Query > Query Viewer
Depending on your security roles

Dissecting a query

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

BTF_FUND_CODE

Search

[Advanced Search](#)

Search Results

*Folder View

-- All Folders --

Check All

Uncheck All

*Action

-- Choose --

Go

Query	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input type="checkbox"/>	BTF_FUND_CODE	Fund Code ChartField	Public		Edit	HTML	Excel	XML	Schedule



[? Help](#)

BTF_FUND_CODE

SetID: 

Fund Code Like:



SetID = SHARE,Fund Code Like=%

[View All](#) | [Rerun Query](#) | [Download to Excel](#) | [Download to XML](#)

First 1-98 of 98 Last

	SetID	Fund	Eff Date	Status	Descr	Short Desc	Bud. Only	Sync ID	Sync Date Time
1	SHARE	12000	02/16/2012	I	Auxiliary Enterprises	Aux Enterp	N	234	03/29/2012 8:12:33PM
2	SHARE	12000	03/29/2012	I	Auxiliary Enterprises	Aux Enterp	N	234	03/29/2012 8:12:16PM
3	SHARE	12000	04/04/2013	I	Auxiliary Enterprises	Aux Enterp	N	234	04/04/2013 6:42:42PM
4	SHARE	12000	04/25/2013	I	Auxiliary Enterprises	Aux Enterp	N	234	04/25/2013 5:22:29PM
5	SHARE	12000	04/23/2014	I	Auxiliary Enterprises	Aux Enterp	N	234	05/02/2014 5:30:28PM
6	SHARE	12000	02/21/2013	I	Auxiliary Enterprises	Aux Enterp	N	234	03/11/2013 3:09:24PM
7	SHARE	12000	06/24/2013	I	Auxiliary Enterprises	Aux Enterp	N	234	07/17/2013 5:02:34PM
8	SHARE	11920	01/01/1901	A	University System Office	USO	N	212	05/11/2009 2:30:49PM
9	SHARE	21922	01/01/1901	A	USO-Health Insurance Reporting	USOHealth	N	213	05/11/2009 2:30:49PM
10	SHARE	21940	01/01/1901	A	USO-GPLS-Library Systems	USO-LibSys	N	214	05/11/2009 2:30:49PM
11	SHARE	11922	01/01/1901	A	USO-Health Insurance Reporting	USO Health	N	215	05/11/2009 2:30:49PM
12	SHARE	11930	01/01/1901	A	USO-GA Public Library Services	USO-GPLS	N	216	05/11/2009 2:30:49PM
13	SHARE	21999	01/01/1901	A	Restricted Oth Organized Acti	Oth Org Act	N	217	05/11/2009 2:30:49PM

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 begins with
 [Advanced Search](#)

Search Results

*Folder View

*Action

Query						Personalize	Find	View All	First	1 of
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	
<input type="checkbox"/>	BTF_FUND_CODE	Fund Code ChartField	Public		Edit	HTML	Excel	XML	Schedule	

Favorites Main Menu > Reporting Tools > Query > Query Manager

New Window ?

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Query Name BTF_FUND_CODE Description Fund Code ChartField

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.

Chosen Records

Alias Record

 A FUND_TBL - Fund Table [Hierarchy Join](#) 

Save Save As New Query Preferences Properties Publish as Feed New Union

- Records
- Query**
- Expressions
- Prompts
- Fields
- Criteria
- Having
- View SQL
- Run

Query Name BTF_FUND_CODE

Description Fund Code ChartField

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.

Chosen Records

Alias Record

A FUND_TBL - Fund Table [Hierarchy Join](#) [-]

Fields Find | View All First 1-9 of 9 Last

<input checked="" type="checkbox"/>	 SETID - SetID		
<input checked="" type="checkbox"/>	 FUND_CODE - Fund Code	Join FUND_TBL - Fund Table	
<input checked="" type="checkbox"/>	 EFFDT - Effective Date		
<input checked="" type="checkbox"/>	EFF_STATUS - Status as of Effective Date		
<input checked="" type="checkbox"/>	DESCR - Description		
<input checked="" type="checkbox"/>	DESCRSHORT - Short Description		
<input checked="" type="checkbox"/>	BUDGETARY_ONLY - Budgetary Only		
<input checked="" type="checkbox"/>	SYNCID - Synchronization ID		
<input checked="" type="checkbox"/>	SYNCDTTM - Sync Date Time		

- Save
- Save As
- New Query
- Preferences
- Properties
- Publish as Feed
- New Union

Records

Query

Expressions

Prompts

Fields

Criteria

Having

View SQL

Run

Query Name BTF_FUND_CODE

Description Fund Code Cha

Add Expression

No expressions have been defined yet.

Save

[Save As](#)

[New Query](#)

[Preferences](#)

[Properties](#)

[Publish as Feed](#)

[New Union](#)

Records | Query | Expressions | **Prompts** | Fields | Criteria | Having | View SQL | Run

Query Name BTF_FUND_CODE

Description Fund Code Char

Add Prompt

Prompts List			Personalize	Find	First	1-2 of 2	Last
Prompt	Edit	Delete					
:1 = SETID - SetID	Edit	-					
:2 = FUND_CODE - Fund Code Like	Edit	-					

Save | [Save As](#) | [New Query](#) | [Preferences](#) | [Properties](#) | [Publish as Feed](#) | [New Union](#)

Records Query Expressions Prompts **Fields** Criteria Having View SQL Run

Query Name BTF_FUND_CODE

Description Fund Code ChartField

View field properties, or use field as criteria in query statement.

Reorder / Sort

Fields									
Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.SETID - SetID	Char5				SetID		Edit	
2	A.FUND_CODE - Fund Code	Char5				Fund		Edit	
3	A.EFFDT - Effective Date	Date				Eff Date		Edit	
4	A.EFF_STATUS - Status as of Effective Date	Char1		N		Status		Edit	
5	A.DESCR - Description	Char30				Descr		Edit	
6	A.DESCRSHORT - Short Description	Char10				Short Desc		Edit	
7	A.BUDGETARY_ONLY - Budgetary Only	Char1				Bud. Only		Edit	
8	A.SYNCID - Synchronization ID	Num10.0				Sync ID		Edit	
9	A.SYNCDTM - Sync Date Time	DateTm				Sync Date Time		Edit	

Save

[Save As](#)

[New Query](#)

[Preferences](#)

[Properties](#)

[Publish as Feed](#)

[New Union](#)

Return

Records Query Expressions Prompts Fields **Criteria** Having View SQL Run

Query Name BTF_FUND_CODE

Description Fund Code ChartField

Add Criteria Group Criteria Reorder Criteria

Criteria					
Logical	Expression1	Condition Type	Expression 2	Edit	Delete
<input type="checkbox"/>	A.SETID - SetID	equal to	:1	Edit	-
AND <input checked="" type="checkbox"/>	A.FUND_CODE - Fund Code	like	:2	Edit	-

Save Save As New Query Preferences Properties Publish as Feed New Union Re

Records **Query** Expressions Prompts Fields Criteria Having View SQL

Query Name BOR_AP_DUE

Descripti

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add or remove records by clicking the records tab. When finished click the fields tab.

Chosen Records

Alias Record

- A PYMNT_VCHR_XREF - Voucher Scheduled Payment
- B VOUCHER - AP Voucher Header Table
- C VENDOR - Vendor Header Table
- D VENDOR_PAY - Vendor Payment Defaults

Query Name BOR_AP_DUE

Description AP Scheduled thru Selected Dt



View field properties, or use field as criteria in query statement.

Reorder / Sort

Fields									
Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.REMIT_VENDOR - Remit Vendor	Char10	1			Vendor		Edit	
2	C.NAME1 - Name 1	Char40				Name		Edit	
3	A.VNDR_LOC - Vendor Location	Char10				Location		Edit	
4	A.REMIT_ADDR_SEQ_NUM - Remitting Address	Num5.0				Address Seq		Edit	
5	C.VENDOR_STATUS - Vendor Status	Char1		S		Vendor Status		Edit	
6	A.VOUCHER_ID - Voucher ID	Char8				Voucher		Edit	
7	A.SCHEDULED_PAY_DT - Scheduled to Pay	Date				Scheduled		Edit	
8	A.DSCNT_DUE_DT - Discount Due Date	Date				Disc due		Edit	
9	A.DUE_DT - Due Date	Date				Due		Edit	
10	B.ACCOUNTING_DT - Accounting Date	Date				Vchr Acctg Date		Edit	
11	A.PYMNT_GROSS_AMT - Gross Payment	SNm25.3				Gross Amt		Edit	

Query Name BOR_AP_DUE

Description AP Scheduled thru Selected Dt

Add Criteria Group Criteria Reorder Criteria

Criteria					
Logical	Expression1	Condition Type	Expression 2	Edit	Delete
<input type="checkbox"/>	A.BUSINESS_UNIT - Business Unit	equal to	:1	Edit	-
AND	A.SCHEDULED_PAY_DT - Scheduled to Pay	not greater than	:2	Edit	-
AND	A.PYMNT_METHOD - Payment Method	equal to	:3	Edit	-
AND	A.PYMNT_SELCT_STATUS - Payment Selection Status	in list	('D','N','R','V')	Edit	-
AND	A.BUSINESS_UNIT - Business Unit	equal to	B.BUSINESS_UNIT - Business Unit	Edit	-
AND	A.VOUCHER_ID - Voucher ID	equal to	B.VOUCHER_ID - Voucher ID	Edit	-
AND	C.SETID - SetID	equal to	A.REMIT_SETID - Remit SetID	Edit	-
AND	C.VENDOR_ID - Vendor ID	equal to	A.REMIT_VENDOR - Remit Vendor	Edit	-
AND	B.ENTRY_STATUS - Entry Status	not equal to	X	Edit	-
AND	B.CLOSE_STATUS - Close Status Indicator	not equal to	C	Edit	-
AND	B.PROCESS_MAN_CLOSE - Process Manual Close	not equal to	Y	Edit	-
AND	A.REMIT_SETID - Remit SetID	equal to	D.SETID - SetID	Edit	-
AND	A.REMIT_VENDOR - Remit Vendor	equal to	D.VENDOR_ID - Vendor ID	Edit	-
AND	D.EFFDT - Effective Date	Eff Date <=	Current Date	Edit	-
AND	A.VNDR_LOC - Vendor Location	equal to	D.VNDR_LOC - Vendor Location	Edit	-
AND	B.ENTRY_STATUS - Entry Status	not equal to	T	Edit	-

Modify an Existing Query

Saving your Query

Favorites | Main Menu > Reporting Tools > Query > Query Manager

Enter a name to save this query as:

*Query: x

Description:

Folder:

*Query Type: v

*Owner: v

Query Definition:

Public vs. Private Queries

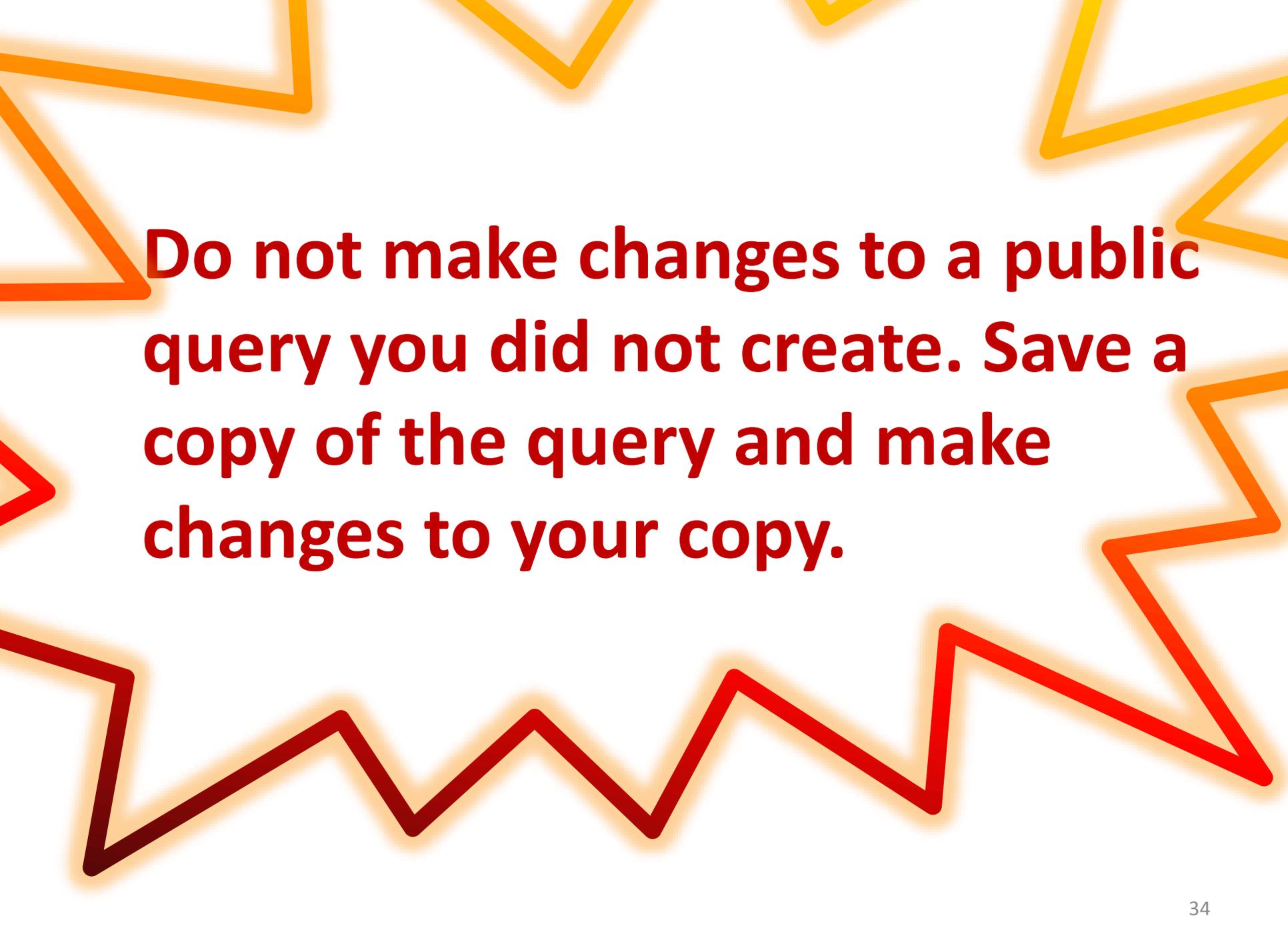
- PUBLIC: Anyone can use a public query.
 - Anyone with public or private query security roles can change that query
- PRIVATE: Only the person who created a private query can use it or delete it.

Public vs. Private Queries

- When you create a query
 - Save a private copy for yourself
 - Then save a public version with a unique name for everyone else.
 - If someone changes or deletes the public query you created, you will still have the private version.

Do not make changes to a public query you did not create. Save a copy of the query and make changes to your copy.





Do not make changes to a public query you did not create. Save a copy of the query and make changes to your copy.

Naming Queries



- Do NOT use BOR_
- You can rename your queries

Query Properties

Favorites Main Menu > Reporting Tools > Query > Query Manager New Window

Records **Query** Expressions Prompts Fields Criteria Having View SQL Run

Query Name BOR_AP_DUE Description AP Scheduled thru Sel

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.

Chosen Records

Alias	Record	
	A PYMNT_VCHR_XREF - Voucher Scheduled Payment	Hierarchy Join <input type="checkbox"/>
	B VOUCHER - AP Voucher Header Table	Hierarchy Join <input type="checkbox"/>
	C VENDOR - Vendor Header Table	Hierarchy Join <input type="checkbox"/>
	D VENDOR_PAY - Vendor Payment Defaults	Hierarchy Join <input type="checkbox"/>

[Save As](#) [New Query](#) [Preferences](#) **[Properties](#)** [Publish as Feed](#) [New Union](#)

Query Properties

Favorites | Main Menu > Reporting Tools > Query > Query Manager

Query Properties

*Query:

Description:

Folder:

*Query Type:

*Owner:

Distinct Security Join Optimizer

Query Definition:

Last Updated Date/Time: 11/07/2009 8:12:30AM

Last Update User ID: YHOWINGTON

Sharing a Query

- Save it as your private version first
- Save As, change the name, make it a Public Query - Seen by everyone

OR

- Copy it to a specific user

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 begins with

[Advanced Search](#)

Search Results

*Folder View

*Action

Select	Query Name	Descr	Owner	Action	Run to XML	Run to Excel	Run to XML	Schedule
<input checked="" type="checkbox"/>	BTF_FUND_CODE	Fund Code ChartField	Public	<ul style="list-style-type: none"> -- Choose -- Add to Favorites Copy to User Delete Selected Move to Folder Rename Selected 	Run to XML	Run to Excel	Run to XML	Schedule

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 begins with
 [Advanced Search](#)

Search Results

*Folder View

*Action

Query	Personalize	Find	View All	First	of 1
<input type="checkbox"/>	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input checked="" type="checkbox"/>	Edit	HTML	Excel	XML	Schedule
Select	Query Name	Descr	Owner	Folder	
<input checked="" type="checkbox"/>	BTF_FUND_CODE	Fund Code ChartField	Public		

Running Queries

- **Edit:** Review/Change query parameters
- **HTML:** Runs the query to browser window
- **Excel:** Runs the query, results open in Excel
- **XML:** Runs the query, results in XML format
- **Schedule:** Runs the query in the process monitor. Results in XLS, PDF, TXT, XML

Scheduling Queries

- Why?
 - Queries that take a long time to process
 - Queries that return a large number of rows

- See Job Aid: **Scheduling a Query**

Query Maintenance

Cleanup existing queries

- Deleting a query
 - For cleanup purposes, delete queries you no longer use...get rid of the clutter.
- Renaming a query
 - Make sure all the queries you want to keep have the correct naming convention

New Features

Drilling URLs

- Results show as links that open a new window:
 - A page within PeopleSoft (Voucher Inquiry)
 - Results of another query
 - An external page or attachment

New Features

- Subqueries: A query within a query
- Pivot Grids (similar to Excel Pivot Tables)
- Connected Query (output in structured XML)

Query Resources

- GeorgiaFIRST Online Training
 - <http://www.usg.edu/gafirst-fin/training/online>
Complete enrollment form and email to [ITS Helpdesk](#)
- ORACLE University
 - <http://education.oracle.com>

Query Resources

- Query Maintenance Best Practices
 - Query changes in PeopleTools 8.52 and Instructions for Scheduling a Query
 - Key records for Queries
 - Entity Relationship Diagrams
- http://www.usg.edu/gafirst-fin/documentation/category/general_job_aids_and_reference_documents

Query Resources

Documentation	
Announcements	
Known Issues	+
Releases	+
Project Information	
Training	x
▶ GeorgiaFIRST Training	
Online Training	
v9.2 Training Resources	
Training Archives	
Online Travel & Expense Training	
ePro/GeorgiaFIRST Marketplace Training	

GeorgiaFIRST Training

The GeorgiaFIRST Training web pages contain information on all training initiatives for GeorgiaFIRST Financials.

- [GeorgiaFIRST Upcoming Training Events](#)
Up-to-date information on training events
- [Online GeorgiaFIRST Training](#)
GeorgiaFIRST Training modules available via GeorgiaVIEW
- [GeorgiaFIRST Training Resources](#)
Training resources developed from upgrade to PSFIN version 9.2
- [GeorgiaFIRST Training Archives](#)
Archives of past GeorgiaFIRST Training Sessions
- [Online Travel & Expense Training Modules for Non-Traditional PeopleSoft Users](#)
Training modules for non-traditional users of Travel and Expenses
- [ePro/GeorgiaFIRST Marketplace Training](#)
Training materials and online lessons for users of ePro and the GeorgiaFIRST Marketplace
- [Georgia Summit Presentations](#)

- [Getting Started in PeopleSoft Financials v9.2 \(6:30\)](#)

This video provides basic tips to help new users navigate in PeopleSoft.

- [Overview of the Introduction to Oracle PeopleSoft Financials Online Class \(5:17\)](#)

[Common Definitions in PeopleSoft Handout](#) 

This course is designed to introduce a new user to Georgia *FIRST* and PeopleSoft Financials, including some basic elements in PeopleSoft Financials.

- [Relational Databases \(8:07\)](#)

[Relational Databases Handout.pdf](#) 

This course is designed to introduce a new user to relational databases, the structure underpinning PeopleSoft Financials.

- [John Buys a Printer \(9:57\)](#)

[John_Buys_a_Printer_Handout.pdf](#) 

[Modules_Handout.pdf](#) 

John Buys a Printer walks users through the entire process of purchasing an item in Georgia *FIRST* PeopleSoft Financials and explains how all of the modules relate to each other.

- [Security Access in PeopleSoft Financials \(4.28\)](#)

This course is designed to introduce a new user to the PeopleSoft Financials security system and to explain how users access the database.

- [Georgia *FIRST* Website and Releases \(8:01\)](#)

[GeorgiaFIRST_Financials_LISTSERV_Handout.pdf](#) 

This course is designed to familiarize users with the Georgia *FIRST* website and help them understand the purpose of new releases.

Query Resources

The following resources are designed to assist users with PeopleSoft Financials Web Query.

- [Introduction to PeopleSoft Query \(4:27\)](#)

This series is designed to introduce a new user to PeopleSoft Financials queries. In it, you will learn what a query is, how to find the query you need, and how to run a query. This first course will focus on understanding the background and concept of queries.

- [How to Use Query Manager to Find the Query You Need \(6:50\)](#)

This course is designed to teach beginning query users how to use Query Manager to find existing queries in PeopleSoft.

- [How to Use the Georgia *FIRST* Website to Find the Queries You Need \(6:50\)](#)

This course is designed to teach beginning query users how to use the Georgia *FIRST* website to find existing queries.

- [Running, Saving and Printing Existing Queries \(3:52\)](#)

This course is designed to teach beginning query users how to run, save and print an existing query.

- [How to Schedule and Retrieve a Query \(3:56\)](#)

This course is designed to teach beginning query users how to schedule queries and then retrieve them after they have run.

Job Aids

[9.2 Key Records for Queries](#) 

[Query Maintenance and Best Practices](#) 

[Query Changes](#) 

[Query Viewer Basics](#) 

[Query Manager Basics](#) 

[Adding a Query to Favorites](#) 

Queries and Reports Job Aids

GeorgiaFIRST Financials

Overview

► **Documentation**

Announcements

Known Issues

Releases

Project Information

Training

iStrategy/Reporting

Budget Issues Committee

Support

You are currently logged into GeorgiaFIRST. [Log Out](#)

Documentation

 Print friendly  Email or share

PeopleSoft Financial Modules: Asset Management:

- [View Announcements for Asset Management](#)
- [View Active Known Issues for Asset Management](#)
- [View Job Aids and Reference Documents for Asset Management](#)

Business Processes for Asset Management

Posted/modified	Type	Documentation	Active Project
07.21.16		Asset Management (AM) - Integration 	Active
07.21.16		Asset Management (AM) - Assets 	Active
06.07.16		Asset Management Business Process Index 	Active
04.29.16		9.2 Asset Management Queries and Reports 	Active

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Asset Information Queries:

Query Name	Description	Parameters
<p>BOR_AM_ASSET_NO_TAG_NUMBER Assets Missing Tag Numbers Query</p>	<p>List of all assets in the system without a tag number.</p> <p>Run this query prior to performing physical inventory.</p> <p>Returns the following for each asset:</p> <ul style="list-style-type: none"> • Business Unit, Asset ID, Description, Asset Status, Tag Number 	<ul style="list-style-type: none"> • Unit
<p>BOR_AM_ASSET_AP_TO_AM_LOAD Assets to Load Query</p>	<p>Returns the identification of the receipts and vouchers that are ready to be interfaced to the AM Module.</p> <p>Returns the following for each asset:</p> <ul style="list-style-type: none"> • Unit, Voucher, Line, Quantity, Receipt No., Receipt Line, PO No., Line, Profile ID, Amount, Unit Cost, Descr 	<ul style="list-style-type: none"> • AP Unit

2-Day Query Class

Nov. 8th: Query Training for Beginners

- Relational Databases
- Working with Existing Queries
- Creating a Basic Query
- Adding Criteria to a Query
- Query Maintenance Best Practices

Nov. 9th: Query Training for Advanced Users

- Advanced Selection Criteria
- Run Time Prompts
- Aggregate Functions
- Working with Multiple Tables

Demonstration

Changing and saving a query

