Welcome!

- Purpose of this training session is to provide an overview of the Query Viewer tool to run public queries in PeopleSoft.

- Toward the end of this session you will have the opportunity to review information related to your own department or projects.
Agenda

• Crosswalk Inquiry
• Creating PeopleSoft favorites
• Searching for public queries
• Running queries
• Scheduling queries
• Questions/Open Discussion
Cross Walk Inquiry

USC Conversion > USC Chartfield Mapping > USC Department/Fund Inquiry
## Project ID ➔ Department/Fund

### USC Dept/Fund Inquiry

<table>
<thead>
<tr>
<th>USC Department/Fund</th>
<th>Oper Unit</th>
<th>Fund Code</th>
<th>Dept</th>
<th>Class Field</th>
<th>Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>USC Department/Fund</td>
<td>Oper Unit</td>
<td>Fund Code</td>
<td>Dept</td>
<td>Class Field</td>
<td>Product</td>
</tr>
</tbody>
</table>

**Fiscal Year**

**PC Business Unit**

**Project**

**Activity**

### Results

<table>
<thead>
<tr>
<th>USC Department</th>
<th>USC Fund</th>
<th>Description</th>
<th>Fiscal Year</th>
<th>Operating Unit</th>
<th>Department</th>
<th>Fund Code</th>
<th>Class Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>13020</td>
<td>FC29</td>
<td>MECHANISTIC STUDIES OF IRON REGULATION</td>
<td>2013</td>
<td>CL071</td>
<td>130200</td>
<td>F1000</td>
<td>202</td>
</tr>
<tr>
<td>13020</td>
<td>FC29</td>
<td>MECHANISTIC STUDIES OF IRON REGULATION</td>
<td>2016</td>
<td>CL071</td>
<td>130200</td>
<td>F1000</td>
<td>202</td>
</tr>
<tr>
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<td>FC29</td>
<td>MECHANISTIC STUDIES OF IRON REGULATION</td>
<td>2015</td>
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<td>130200</td>
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<td>202</td>
</tr>
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<td>FC29</td>
<td>MECHANISTIC STUDIES OF IRON REGULATION</td>
<td>2014</td>
<td>CL071</td>
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<td>F1000</td>
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</tbody>
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<tr>
<th>USC Department</th>
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<th>Description</th>
<th>Fiscal Year</th>
<th>Operating Unit</th>
<th>Department</th>
<th>Fund Code</th>
<th>Class Field</th>
<th>PC Business Unit</th>
<th>Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>13020</td>
<td>MECHANISTIC STUDIES OF IRON REGULATION</td>
<td>2013</td>
<td>CL071</td>
<td>130200</td>
<td>F1000</td>
<td>202</td>
<td>USCSP</td>
<td>10003055</td>
</tr>
<tr>
<td>2</td>
<td>13020</td>
<td>MECHANISTIC STUDIES OF IRON REGULATION</td>
<td>2014</td>
<td>CL071</td>
<td>130200</td>
<td>F1000</td>
<td>202</td>
<td>USCSP</td>
<td>10003055</td>
</tr>
<tr>
<td>3</td>
<td>13020</td>
<td>MECHANISTIC STUDIES OF IRON REGULATION</td>
<td>2015</td>
<td>CL071</td>
<td>130200</td>
<td>F1000</td>
<td>202</td>
<td>USCSP</td>
<td>10003055</td>
</tr>
<tr>
<td>4</td>
<td>13020</td>
<td>MECHANISTIC STUDIES OF IRON REGULATION</td>
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<td>CL071</td>
<td>130200</td>
<td>F1000</td>
<td>202</td>
<td>USCSP</td>
<td>10003055</td>
</tr>
</tbody>
</table>
Using the Cross Walk
PeopleSoft Queries

- A query is a tool used to retrieve information from PeopleSoft.
- Navigation:
  Main menu > 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  [Query Name]  begins with

Search  Advanced Search
Categories of Queries Available

• Pre-Encumbrance
  *(Requisitions and Purchase Orders prior to Dispatch)*
  
  o SC_REQUISITIONS
  o SC_PRE_ENCUMBRANCE_DETAIL
  o SC_PRE_ENCUMBRANCE_SUMMARY

• Encumbrance
  *(Purchase Order in Dispatched Status)*
  
  o SC_PURCHASE_ORDERS
  o SC_ENCUMBERANCE_DETAIL
  o SC_ENCUMBERANCE_SUMMARY
Categories of Queries Cont’d

There are also queries available to you related to the following:

• Actuals
• Budget
• Open and Close Balances
• COA – Chart of Accounts
• Others
PeopleSoft Resources - Query Help

- Reporting Information
  - Query Tip 1
  - Query Tip 2
  - Query Listing with Descriptions
Steps to Run a Query

- Enter the query name or partial name then click search
- All queries that match the criteria return in search results

![Query Viewer Image]

<table>
<thead>
<tr>
<th>Query Name</th>
<th>Description</th>
<th>Owner</th>
<th>Folder</th>
<th>Run to HTML</th>
<th>Run to Excel</th>
<th>Run to XML</th>
<th>Schedule</th>
<th>Definitional References</th>
<th>Add to Favorites</th>
</tr>
</thead>
<tbody>
<tr>
<td>SC_COLUMBIA_FUNDS_CAR_FWD ACTUALS</td>
<td></td>
<td>Public</td>
<td>BUDGET OFFICE</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
<td>Lookup References</td>
<td>Favorite</td>
</tr>
</tbody>
</table>
Steps to Run a Query cont’d

- Suggestion is to run query to HTML; you then get options to export it as csv, excel or xml formats.
- You can also add queries to your Favorites List.
Criteria for SC_COLUMBIA_FUNDS_CAR_FWD

- Here is a list of the available search criteria.
SC_COLUMBIA_FUNDS_CAR_FWD Results

- The results for the query are returned based on the criteria entered.
- If there are too many results to fit on the page; PeopleSoft tells you how many out of the total results are available.

### SC_COLUMBIA_FUNDS_CAR_FWD - ACTUALS

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Oper Unit</th>
<th>Period</th>
<th>Fund</th>
<th>View Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>CL040</td>
<td>2</td>
<td>A1000</td>
<td></td>
</tr>
</tbody>
</table>

![Download results in: Excel SpreadSheet, CSV Text File, XML File (1 kb)](image)

View All

<table>
<thead>
<tr>
<th>Oper Unit</th>
<th>PRIOR YR CARRY FORWARD</th>
<th>BUDGETED ALLOC (as)</th>
<th>ACTUAL REVENUES (as)</th>
<th>ACTUAL TRANS FM (81xxx)</th>
<th>ACTUAL TRANS TO (86xxx)</th>
<th>ACTUAL EXPENSE (as)</th>
<th>ACTUAL IITs (as)</th>
<th>NEW YR CARRY FORWARD</th>
</tr>
</thead>
<tbody>
<tr>
<td>CL040</td>
<td>0.00</td>
<td>0.00</td>
<td>193818.86</td>
<td>0.00</td>
<td>0.00</td>
<td>-128389.35</td>
<td>0.00</td>
<td>65429.51</td>
</tr>
</tbody>
</table>
Running a Query and Exporting Results
Creating Favorites in PeopleSoft

Main Menu > Reporting Tools > Query > Query Viewer

- Recently Used
  - Query Viewer
  - University Dashboard
  - Report Manager
  - Award Profile
  - Budgets Overview

- Recent Search Results
- My Favorites
  - Add to Favorites
  - Edit Favorites
  - ACM Dashboard

Use fields blank for a list of all values.

begins with
Naming and Saving Favorites

- Favorites are available on any computer accessed using your user id and password.
Creating a Favorite
Navigation to Schedule a Query

- Main Menu > Reporting Tools > Query > Schedule Query
  or
- After you’ve selected the query, you can click the **Schedule** link

---

**Query Viewer**

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

*Search By* Query Name begins with SC_PAY

*Search Results*

*Folder View* -- All Folders --

<table>
<thead>
<tr>
<th>Query Name</th>
<th>Description</th>
<th>Owner</th>
<th>Folder</th>
<th>Run to HTML</th>
<th>Run to Excel</th>
<th>Run to XML</th>
<th>Schedule</th>
<th>Definitional References</th>
<th>Add to Favorites</th>
</tr>
</thead>
<tbody>
<tr>
<td>SC_PAYMENTS</td>
<td>SC Payments</td>
<td>Public</td>
<td>SYSTEM</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
<td>Lookup References</td>
<td>Favorite</td>
</tr>
<tr>
<td>SC_PAY_REQUESTS</td>
<td>SC Pay Requests</td>
<td>Public</td>
<td>SYSTEM</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
<td>Lookup References</td>
<td>Favorite</td>
</tr>
</tbody>
</table>
Scheduling a Query

- Click the **Add a New Value** tab.
- Create a Run Control ID, remember it cannot contain any spaces.
- Click the **Add** button.
Enter Query Criteria

- Use the look up icon to select the appropriate parameters for the query.

- After entering all the criteria for the query, click the OK button.
Update Query Criteria, if needed

- Click the **Update Parameters** link to make changes.
- Click the **Run** button to submit.
Query Schedule Options

- Update the Recurrence to your desired frequency.
- Use the calendar to select the first run date.
Process Instance

- Note the Process Instance number
  - This is used to track the status of the request in the Process Monitor.

```
Schedule Query

Run Control ID   AG2
Report Manager
Process Monitor

Query Name: SC_PAY_REQUESTS
Search
*Description: SC Pay Requests

Process Instance: 290686
```

OneCarolina
# Report Manager

- **Navigation:**
  - Main Menu > Reporting Tools > Report Manager

## View Reports For

<table>
<thead>
<tr>
<th>Folder</th>
<th>Instance</th>
<th>Refresh</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>290686 to 290686</td>
<td></td>
</tr>
</tbody>
</table>

## Reports

<table>
<thead>
<tr>
<th>Report</th>
<th>Report Description</th>
<th>Folder Name</th>
<th>Completion Date/Time</th>
<th>Report ID</th>
<th>Process Instance</th>
</tr>
</thead>
<tbody>
<tr>
<td>SC Pay Requests</td>
<td>SC PAY REQUESTS</td>
<td>General</td>
<td>04/14/16 4:21PM</td>
<td>153711</td>
<td>290686</td>
</tr>
</tbody>
</table>

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*One Carolina*
## Report Manager

<table>
<thead>
<tr>
<th>Report</th>
<th></th>
<th>Process Instance</th>
<th>290686</th>
<th>Message Log</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>PSQUERY</td>
<td>Process Type</td>
<td>Application Engine</td>
<td></td>
</tr>
<tr>
<td>Run Status</td>
<td>Success</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### SC Pay Requests

#### Distribution Details

<table>
<thead>
<tr>
<th>Distribution Node</th>
<th>DNODE</th>
<th>Expiration Date</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>04/21/2016</td>
<td></td>
</tr>
</tbody>
</table>

#### File List

<table>
<thead>
<tr>
<th>Name</th>
<th>File Size (bytes)</th>
<th>Datetime Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>AE_PSQUERY_290686.stdout</td>
<td>289</td>
<td>04/14/2016 4:21:55.246782PM EDT</td>
</tr>
<tr>
<td>AE_PSQUERY_290686.trc</td>
<td>188</td>
<td>04/14/2016 4:21:55.246782PM EDT</td>
</tr>
<tr>
<td>SC_PAY_REQUESTS-290686.html</td>
<td>8,234</td>
<td>04/14/2016 4:21:55.246782PM EDT</td>
</tr>
</tbody>
</table>

#### Distribute To

<table>
<thead>
<tr>
<th>Distribution ID Type</th>
<th>*Distribution ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>User</td>
<td>ANDREADG</td>
</tr>
</tbody>
</table>
Questions
Thank you!