



# Query Viewer Training

June 2016

# 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

Favorites ▾ Main Menu ▾ > USC Conversion ▾ > USC Chartfield Mapping ▾ > USC Department/Fund Inquiry

 UNIVERSITY OF SOUTH CAROLINA

USC Dept/Fund Inquiry

USC Department/Fund	Oper Unit	Fund Code	Dept	Class Field	Product
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Fiscal Year	PC Business Unit	Project	Activity		
<input type="text"/>	<input type="text" value="USCSP"/>	<input type="text" value="10003055"/>	<input type="text"/>		

Search

# Project ID → Department/Fund

## USC Dept/Fund Inquiry

USC Department/Fund  Oper Unit  Fund Code  Dept  Class Field  Product

Fiscal Year  PC Business Unit  Project  Activity

	USC Department	USC Fund	Description	Fiscal Year	Operating Unit	Department	Fund Code	Class Field
1	13020	FC29	MECHANISTIC STUDIES OF IRON REGULATION	2013	CL071	130200	F1000	202
2	13020	FC29	MECHANISTIC STUDIES OF IRON REGULATION	2016	CL071	130200	F1000	202
3	13020	FC29	MECHANISTIC STUDIES OF IRON REGULATION	2015	CL071	130200	F1000	202
4	13020	FC29	MECHANISTIC STUDIES OF IRON REGULATION	2014	CL071	130200	F1000	202

# Department/Fund → Project ID

## USC Dept/Fund Inquiry

USC Department/Fund:    
 Oper Unit:    
 Fund Code:    
 Dept:    
 Class Field:    
 Product:    
 Fiscal Year:   
 PC Business Unit:    
 Project:    
 Activity:

Search

Personalize | Find |

	USC Department	USC Fund	Description	Fiscal Year	Operating Unit	Department	Fund Code	Class Field	PC Business Unit	Project
1	13020	FC29	MECHANISTIC STUDIES OF IRON REGULATION	2013	CL071	130200	F1000	202	USCSP	10003055
2	13020	FC29	MECHANISTIC STUDIES OF IRON REGULATION	2014	CL071	130200	F1000	202	USCSP	10003055
3	13020	FC29	MECHANISTIC STUDIES OF IRON REGULATION	2015	CL071	130200	F1000	202	USCSP	10003055
4	13020	FC29	MECHANISTIC STUDIES OF IRON REGULATION	2016	CL071	130200	F1000	202	USCSP	10003055



# 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)*

- SC\_REQUISITIONS
- SC\_PRE\_ENCUMBRANCE\_DETAIL
- SC\_PRE\_ENCUMBRANCE\_SUMMARY

- **Encumbrance**

*(Purchase Order in Dispatched Status)*

- SC\_PURCHASE\_ORDERS
- SC\_ENCUMBERANCE\_DETAIL
- 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

## PeopleSoft

About

News

Training

Resources

FAQs

Newsletters

## 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**

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

\*Search By  begins with

[Advanced Search](#)

**Search Results**

\*Folder View

Query										Personalize	Find	View All	First	1 of 1	Last
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites						
SC_COLUMBIA_FUNDS_CAR_FWD	ACTUALS	Public	BUDGET OFFICE	HTML	Excel	XML	Schedule	Lookup References	Favorite						



# 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.

**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](#)

**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
SC_COLUMBIA_FUNDS_CAR_FWD	ACTUALS	Public	BUDGET OFFICE	HTML	Excel	XML	Schedule	Lookup References	Favorite



# Criteria for SC\_COLUMBIA\_FUNDS\_CAR\_FWD

- Here is a list of the available search criteria.

SC_COLUMBIA_FUNDS_CAR_FWD - ACTUALS	
Fiscal Year	<input type="text" value="2016"/>
Period	<input type="text" value="0"/>
Oper Unit	<input type="text"/> 
Fund	<input type="text"/> 

# 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

Fiscal Year   
Period   
Oper Unit    
Fund

Download results in : [Excel SpreadSheet](#) [CSV TextFile](#) [XML File \(1 kb\)](#)

[First](#) [1-1 of 1](#) [Last](#)

View All

Oper Unit	PRIOR YR CARRY FORWARD	BUDGETED ALLOC(3s)	ACTUAL REVENUES (4s)	ACTUAL TRANS FM (81xxx)	ACTUAL TRANS TO (86xxx)	ACTUAL EXPENSE (5s)	ACTUAL IITs (6s)	NEW YR CARRY FORWARD
1 CL040	0.00	0.00	193818.86	0.00	0.00	-128389.35	0.00	65429.51



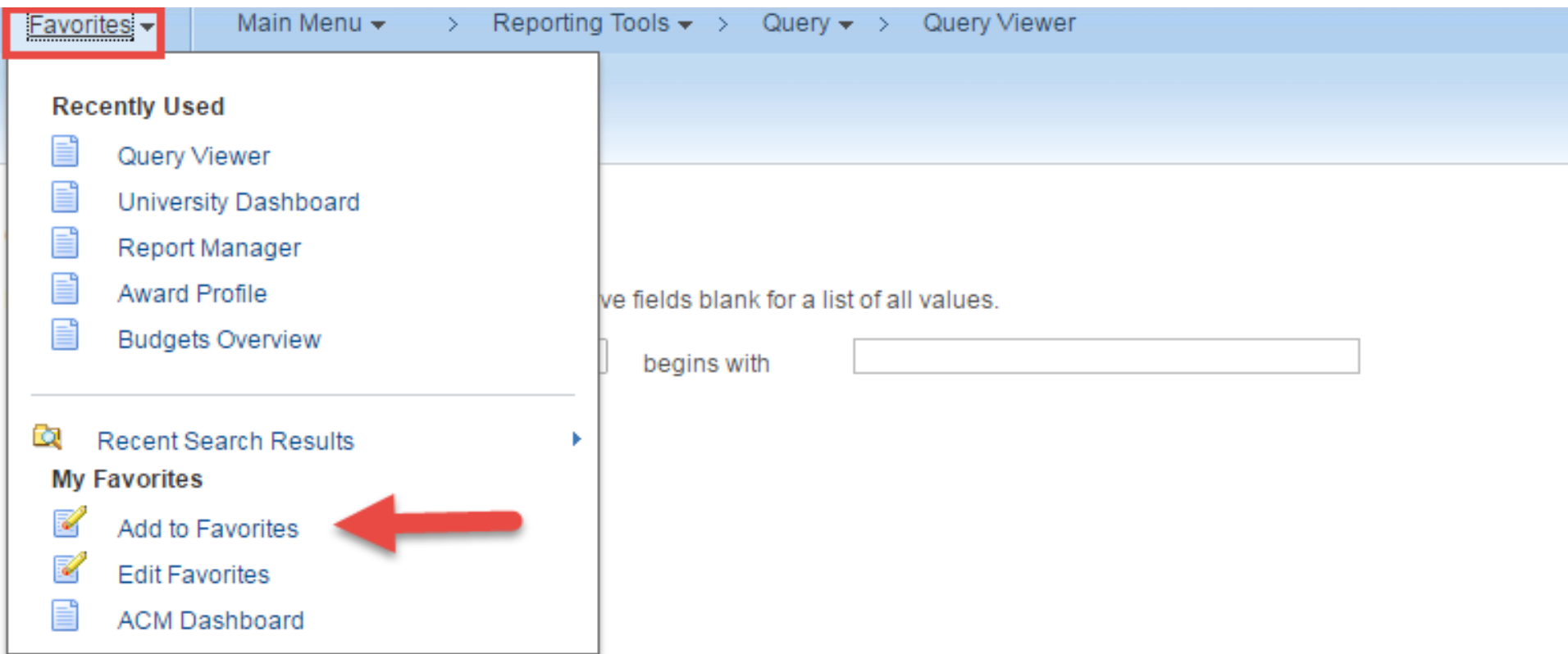
# Running a Query and Exporting Results





# Creating Favorites in PeopleSoft

Main Menu > Reporting Tools > Query > Query Viewer



The screenshot shows the PeopleSoft interface with the 'Favorites' dropdown menu open. The breadcrumb navigation at the top reads 'Main Menu > Reporting Tools > Query > Query Viewer'. The dropdown menu is divided into three sections: 'Recently Used', 'Recent Search Results', and 'My Favorites'. The 'My Favorites' section contains three items: 'Add to Favorites', 'Edit Favorites', and 'ACM Dashboard'. A red arrow points to the 'Add to Favorites' option. The background shows a search filter with the text 'beginning with' and an empty input field.

**Favorites** ▾

Main Menu ▾ > Reporting Tools ▾ > Query ▾ > Query Viewer

**Recently Used**

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

**Recent Search Results** ▶

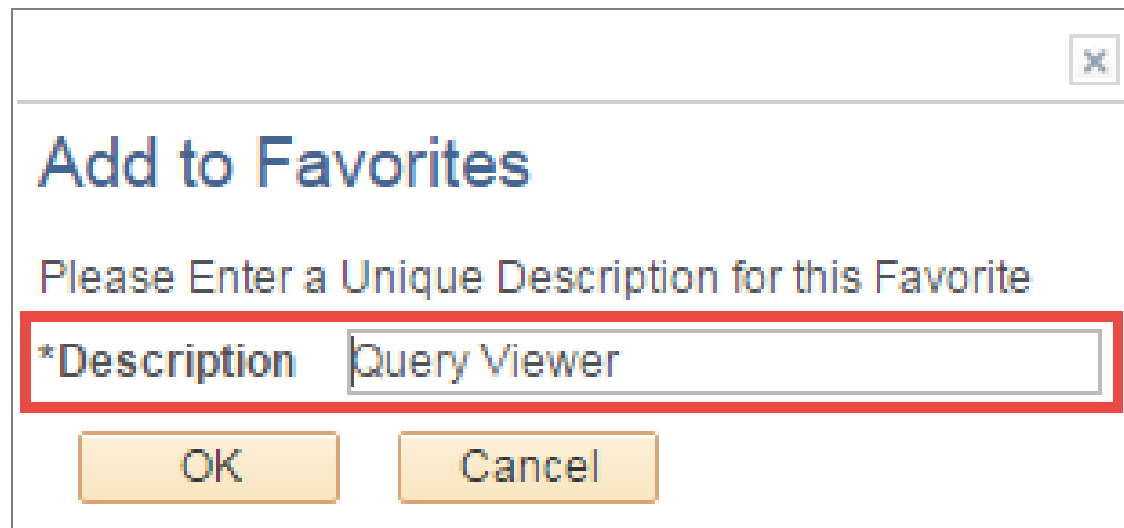
**My Favorites**

- Add to Favorites
- Edit Favorites
- ACM Dashboard

beginning with

# Naming and Saving Favorites

- Favorites are available on any computer accessed using your user id and password.



✕

## Add to Favorites

Please Enter a Unique Description for this Favorite

\*Description Query Viewer

OK

Cancel

# 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  begins with

[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
SC_PAYMENTS	SC Payments	Public	SYSTEM	HTML	Excel	XML	Schedule	Lookup References	Favorite
SC_PAY_REQUESTS	SC Pay Requests	Public	SYSTEM	HTML	Excel	XML	Schedule	Lookup References	Favorite

# 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.

### Scheduled Query

Private Query

Query Name

Run Control ID

# Enter Query Criteria

## SC\_PAY\_REQUESTS

Request ID	<input type="text"/>
Request Status	Approved <input type="button" value="v"/>
Voucher	<input type="text"/>
Invoice	<input type="text"/>
Invoice Date	<input type="text"/> <input type="button" value="31"/>
Supplier	<input type="text"/> <input type="button" value="🔍"/>
Name 1	<input type="text"/>
Description	<input type="text"/>
Amount	<input type="text"/>
Comments	<input type="text"/>
Entered on	<input type="text"/> <input type="button" value="31"/>
User ID	<input type="text"/> <input type="button" value="🔍"/>
Name	<input type="text"/>
USCID	<input type="text"/>
Email	<input type="text"/>
Oper Unit	BF000 <input type="button" value="🔍"/>
Dept	<input type="text"/> <input type="button" value="🔍"/>
Fund	<input type="text"/> <input type="button" value="🔍"/>
Account	<input type="text"/> <input type="button" value="🔍"/>
Class	<input type="text"/> <input type="button" value="🔍"/>
PC BU	<input type="text"/> <input type="button" value="🔍"/>

- 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.

**Schedule Query**

Run Control ID AG2 Report Manager Process Monitor **Run**

Query Name:

\*Description:

**Update Parameters**

Prompt Name	Value
REQUEST_ID	<input type="text"/>
PR_STATUS	5
VOUCHER_ID	<input type="text"/>

# Query Schedule Options

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

Process Scheduler Request ✕

Help

User ID ANDREADG Run Control ID AG2

Server Name  Run Date 04/14/2016

Recurrence PC\_WEEKLY  Run Time 10:03:06AM

Time Zone

**Process List**

Select	Description	Process Name	Process Type	Type	*Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web	HTM	Distribution



# 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:

\*Description:

Process Instance: 290686

# Report Manager

- Navigation:  
Main Menu > Reporting Tools > Report Manager

List Explorer Administration Archives

**View Reports For**

Folder  Instance  to  Refresh

Name  Created On  Last  1 Days

**Reports** Personalize | Find | View All | First  1 of 1  Last

	Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1	SC Pay Requests	SC PAY REQUESTS	General	04/14/16 4:21PM	153711	290686

# Report Manager

## Report

<b>Report ID</b>	153711	<b>Process Instance</b>	290686	<a href="#">Message Log</a>
<b>Name</b>	PSQUERY	<b>Process Type</b>	Application Engine	
<b>Run Status</b>	Success			

SC Pay Requests

## Distribution Details

<b>Distribution Node</b>	DNODE	<b>Expiration Date</b>	04/21/2016
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## File List

Name	File Size (bytes)	Datetime Created
AE_PSQUERY_290686.stdout	289	04/14/2016 4:21:55.246782PM EDT
AE_PSQUERY_290686.trc	188	04/14/2016 4:21:55.246782PM EDT
SC_PAY_REQUESTS-290686.html	8,234	04/14/2016 4:21:55.246782PM EDT

## Distribute To

Distribution ID Type	*Distribution ID
User	ANDREADG

# Scheduling a Query



# Questions



# Thank you !

