Open & Run Financials Queries

Description

PeopleSoft Query provides financial data to department users. Specifically, the kind of data best reviewed through Query includes current accounting balances and accounting transaction detail. You can run existing queries and view the results in a new browser window using **Query Viewer**. Query Viewer enables you to:

- Search for a query
- Preview a query in the active browser window
- Run a query and display results in a new browser window

The purpose of this quick guide is to demonstrate how to open and run existing queries.

Process Steps

**Navigation:**

From PeopleSoft Financials menu: **Reporting Tools > Query > Query Viewer**
The **Query Viewer** page opens in **Basic Search** mode. Both **Basic Search** and **Advanced Search** provide the following categories to guide the search. The default search by category is **Query Name**.

- **Access Group Name**: Provides a list of queries based on user security access.
- **Description**: Common name used to describe the query when it was created.
- **Folder Name**: Folder where the query was stored after it was created via Query Manager.
- **Owner**: Queries are saved as either Public or Private. Public queries can be executed, opened, modified, or deleted by anyone who has security access. Private queries can only be executed, opened, modified, and deleted by the person who created the query.
- **Query Name**: Search for queries based on the name assigned when the query was created.
- **Type**: Query type options are **Archive**, **User**, **Role**, and **Process**. Most users will generally use the **User** query type.
- **Uses Field Name**: Search for queries based upon if the query uses a specific field of data. A specific field name or the beginning of the field name can be entered.
- **Uses Record Name**: Search for queries based upon if the query uses a specific table/record in the database.

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

**Search By:**
- **Query Name**
- **Access Group Name**
- **Description**
- **Folder Name**
- **Owner**
- **Query Name**
- **Type**
- **Uses Field Name**
- **Uses Record Name**
In this example we will search according to *Query Name*. Enter the Query Name and click the **Search** button.

Queries meeting the search criteria will return in a list. You can filter which queries appear in the list by selecting a **Folder View**.

Use the **Customize** feature to change the way **Query Viewer** displays your query search results. This is useful when multiple pages of queries are returned, or when it makes more sense to change the order. The customizations will be attached to your User ID, and future search results will display in the set order.

Use the **Favorite** link in the **Add to Favorites** column to add a query your My Favorite Queries list. Your favorites are associated with your User ID. The list is available each time **Query Viewer** is accessed and can be cleared or specific entries removed.

**Personalize Column and Sort Order**

To order columns or add fields to sort order, highlight column name, then press the appropriate button. Frozen columns display under every tab.

**Search By:**

- **Query Name**
- **Folder View**

**Search Results**

- **Folder View:**  -- All Folders --

**My Favorite Queries**

- **Query Name:** UMS_GLO_REPTING
  - **Description:** All accounts for a project
  - **Owner:** Public
  - **Folder:** USER
  - **Run to HTML:** Schedule
  - **Add to Favorites:**

**Example Search:**

- **Query Name:** UMS_GLO_REPTING
- **Folder:** Public
- **Run to HTML:** Schedule
- **Add to Favorites:**
Query results can be viewed, printed, and saved in a number of formats. PeopleSoft Query allows results to be run to an HTML document or Excel Spreadsheet. Be aware that data viewed in HTML format cannot be edited or modified.

1. Some queries will execute immediately upon selecting either HTML or Excel in the Run to... columns; others will prompt you for input before running the query. For example, if you run the UMS_GLQ_REPTING query, a new window will open where you will be prompted to enter the Period. After you enter the required prompt, click . The results will appear in the selected format in the same browser window.

2. If you run the Query in HTML format, you can switch your results to Excel format by clicking the Excel Spreadsheet link or download the results to Excel by clicking the CSV Text File link in the Download results in section.
To schedule an existing query to run sometime in the future click on the Schedule link.

When scheduling a query, the query will run through Process Scheduler. You define the time and day to run the query, along with distribution options.

A Run Control is needed to schedule a query. Either select an existing run control or create a new run control for the query. In this example, the Run Control ID is called “query_run”. Click Add.

After you enter a Run Control ID and click Add, enter a Description for the query, and enter a Value for any prompts in the query. In this example, you must enter an Accounting Period. Click OK when ready. The Process Scheduler page will open.
On the Process Scheduler Request page you can leave the Server Name field blank.

1. Enter the Run Date and Run Time.

2. If you want to email the query to another user, click the Distribution link to set the e-mail options.

3. The default distribution is only to the user who runs the query. If additional users need to view the query, add them to the Distribute To section. Any users (or roles) selected here will be able to view the query in the Report Manager. Selecting a role will allow anyone with that role to view the query results.

To email the report to a user, click the Email Web Report checkbox and enter a Subject for the email and any text you’d like to include. Next, enter an email address in the Email Address List. If you wish to send the report to more than one email address, enter one address per line with a semicolon after each but the last one. The email will send a link to the query results in the Report Manager. Click OK on the Distribution Detail page and then again on the Process Scheduler Request page.