

# Contents

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# Advanced PeopleSoft Query Overview

PeopleSoft Query (Query) is an end-user reporting tool that allows users to extract information from SFS easily and efficiently. Queries can be as simple or as complex as needed; and can be one-time queries or saved queries used repeatedly. This manual walks through the steps of creating a query using the web query tool, and also discusses some advanced query topics that aid in creating powerful queries. To use Query efficiently, you need a basic understanding of the data (that is, in what record is the data stored) the query will be based upon, and relationships to other records within the database. It is fairly simple to create a query, but it takes time and understanding to create a query and bring back accurate data.

Query has several different ways to do the same task, this manual shows one way. You will likely find different ways to do many items described in this manual. Use the method that works best for you. Before getting started with Query, remember the following:

- Use a single mouse click when working with Query. There is no need to double click on fields or tabs.
- Do not use the back button on the browser when navigating through SFS.
- If the system is processing, there is not a way for you to stop the processing. Pressing the stop button on the browser or clicking on another tab will likely cause the system to not respond. You will lose any unsaved data.
- PeopleSoft uses the terms "record" and "table" interchangeably. In this manual, the terms will mean the same thing, which is a two-dimensional arrangement of rows and columns that holds data.
- Queries can be either 'Public' or 'Private'. Public queries are available for any user to review, run or alter. Private queries can only be accessed by the owner.

Process Frequency	Used on an ad hoc basis.
Dependencies	Knowledge of SFS records and data.



Assumptions User has read and understands the PS Query Manager Basic Intermediate Level business process documents.					
Responsible Parties	N/A				
Alternate Scenarios	N/A				

# **Process Detail**

Navigation: Main Menu > Reporting Tools > Query > Query Manager or access via a WorkCenter.

< Homepage		Accounts Payable WorkCenter
Accounts Payable WorkCenter Main Reports/Queries	• «	Query Manager
Queries C • V		Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Query   Create New Query
<ul> <li>Public</li> <li>Outstanding Checks</li> <li>Review Payments by Vendor</li> <li>Check Details</li> </ul>		*Search By Query Name    begins with  Advanced Search

#### I. Using Subqueries

Build a query to answer the following question: How many vendors do not have any vouchers in the system?

Begin by creating the main query against the VENDOR table.

To build the main guery:

**1.** Click Query Manager.

The Query Manager – Find an Existing Query page appears.

2. Click <u>Create New Query</u>.

The Records page appears.

- **3.** Enter the following in the Search by fields:
  - Leave Name in the first field
  - Leave begins with in the second field
  - Type VENDOR% in the third field



4. Click Search .

A list of records meeting the search criteria appears.

Komepage		Accounts	Payable	WorkCenter	
Accounts Payable WorkCenter	~	Records         Query         Expressions         Prompts         Fields         C           Query Name         New Unsaved Query	riteria Having	Dependency	Transformations Vie
<ul> <li>Query Wanager</li> <li>Public</li> <li>Outstanding Checks</li> <li>Review Payments by Vendor</li> <li>Check Details</li> </ul>		*Search By Record Name	VENDOR%	9	
Vouchers by UserID, Date Range		Record Personalize   Find   View All   🔄	🖌 🛛 First 🕚	1-20 of 20 🕑 Last	
Cleared Checks by PU		Recname	Add Record	Show Fields	
Cleared Checks by BO		VENDOR - Supplier Header Table	Add Record	Show Fields	
		VENDORCNTCT_LG - Supplier Contact Detail	Add Record	Show Fields	
▶ Tax		VENDOR_ADDR - Supplier Address	Add Record	Show Fields	
		VENDOR_ADDR_LNG - Supplier Address	Add Record	Show Fields	
		VENDOR_ADDR_PHN - Supplier Address Telephone Nbr	Add Record	Show Fields	
		VENDOR_AR - PS/AR Supplier View	Add Record	Show Fields	

#### 5. Click Add Record beside VENDOR - Supplier Header Table

The Query tab is automatically selected.

- **6.** Select the following fields:
  - SETID
  - VENDOR\_ID
  - NAME1
  - VENDOR\_STATUS



Komepage		Accounts Payable WorkCenter	
Accounts Payable WorkCenter Main Reports/Queries	0 «	Records Query Expressions Prompts Fields Criteria Having Dependency Transforma	tions View SQL
Queries	0 •	Query Name New Unsaved Query Description	
<ul> <li>Query Manager</li> <li>Public</li> <li>Outstanding Checks</li> </ul>		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	Ŝ⊘
<ul> <li>Review Payments by Vendor</li> <li>Check Details</li> <li>Vouchers by UserID, Date Range</li> <li>AP Payments</li> </ul>		Alias     Record       Image: Check All     Uncheck All	loin 🖃
Cleared Checks by BU		Fields Find   View All First 🕚 1-50 of 69	Last
<ul> <li>Tax</li> </ul>		SETID - SetID Join SETID_TBL - TableSet	94 92
		VENDOR_ID - Supplier ID	2
		VNDR NAME SHRT LISE - Short Supplier Name	9
Reports/Processes	0 •	<ul> <li>✓ VNDR_NAME_SEQ_NUM - Sequence Number</li> <li>✓ NAME1 - Supplier Name</li> </ul>	94 94
		NAME2 - Additional Name	9.
P Trial Register		VENDOR_STATUS - Supplier Status	84
Voucher Activity		VENDOR CLASS - Classification	74

7. Click Save

The save page appears.

Enter a name to save this query:						
*Query XXX_QT_VND_SUBQUERY1						
Description Suppliers without vouchers						
Folder						
*Query Type User						
*Owner Private <b>v</b>						
Query Definition:						
OK Cancel						

8. Type XXX\_QT\_VND\_SUBQUERY1 (XXX – your initials) in the Query field.



9. Type Vendors without vouchers in the Description field.

10	Click	OK

The new query is saved.

Komepage		Accounts Payable WorkCenter			
Accounts Payable WorkCenter • « Main Reports/Queries	Edit Criteria Properties				
Queries C ov	Choose Expression 1	Expression 1			
Query Manager	Туре	Choose Record and Field			
✓ Public	Field	Record Alias.Fieldname			
Outstanding Checks	Expression	Q A.SETID - SetID			
Review Payments by Vendor					
Check Details  Vouchers by UserID, Date Pange	*Condition Type equal to				
AP Payments					
Cleared Checks by BU	Type	Expression 2			
Canceled Check Details	Field	Define Constant			
▶ Tax	Expression	Constant SHARE			
	<ul> <li>Constant</li> </ul>				
	Prompt				
Reports/Processes	Subquery				
	OK Cancel				



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Click on the **Fields** tab. Add Criteria to the SETID by clicking  $\square$ . Under 11. Expression 2 enter SHARE.

Komepage		Ac	counts I	Pay	able	W	orkCenter			
Accounts Payable WorkCenter	» «	Records Query Expressions Prompts I	ields Crite	eria	Havir	ng	Dependency T	ransformations View	SQL Run	
Query Manager		Query Name XXX_QT_VND_SUBQUERY1 View field properties, or use field as criteria in query s	atement.			Desc	ription Suppliers w	Reorder /	Sort Sort	<b>*</b>
Outstanding Checks		Fields					Personalize   Find	View All   💷   📑	First 🕚 1-4 of	ł 4 🕑 La
Review Payments by Vendor		Col Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
Check Details		1 A.SETID - SetID	Char5				SetID	94	Edit	
Vouchers by UserID, Date Range     AB Reumante		2 A.VENDOR_ID - Supplier ID	Char10				Supplier	94	Edit	
Cleared Checks by BU		3 A.NAME1 - Supplier Name	Char40				Supplier	9.	Edit	-
Canceled Check Details		4 A.VENDOR_STATUS - Supplier Status	Char1		N		Status	8	Edit	
Тах		Save Save As New Query Prefe	rences P	ropert	ties	P	ublish as Feed	Publish as Pivot Grid	d	

13. Click on the Run tab.

> The Run page appears, and after a few moments of processing, the results of the query are displayed.

14. How many vendors do you have in the system? \_\_\_\_

Homepage					Accounts Payable WorkCenter	
Accounts Payable WorkCenter		Records	Query	Expressions Pron	npts Fields Criteria Having Dependency Transformation	IS View SQL Run
Main Reports/Queries	0 0 -					
Query Manager		View All	Rerun Query	Download to Excel	Download to XML	First 🕚 1-100 of 37924 🕕 Last
Public			SetID	Supplier	Supplier	Status
Outstanding Checks		1	SHARE	000008721	FRIZZLE, PEGGY	I. I.
Review Payments by Vendor     Check Dataile	2	SHARE	000008747	DAFFINSON ASPHALT MAINTENANCE	1	



15. Click on the Criteria tab.

The Criteria page appears.

- Add Criteria Click 16.
- 17. Leave the default in the Expression 1 Type box.
- 18. Leave the Expression 1 box blank.



K Homepage			Accounts Payable WorkCenter
Accounts Payable WorkCenter Main Reports/Queries	o «	Edit Criteria Properties	
Queries	0 0-	Choose Expression 1	Expression 1
Query Manager		Туре	Choose Record and Field
D. hills		Field	Record Alias.Fieldname
Public     Outstanding Checks     Review Payments by Vendor		Expression	٩
Check Details Vouchers by UserID, Date Range		*Condition Typ	equal to v
AP Payments     Cleared Checks by BU     Canceled Check Details		Choose Expression 2 Type	does not exist
▶ Tax		Field Expression	equal to
		Constant	exists
Reports/Processes	0 07	Prompt	greater than
	and the second second	ounderly	in list
		OK Cancel	in tree
P Trial Register			in the
Voucher Activity			is not null
			is null
Process Monitor			loss than
Report Manager			less man
Reporting Console     Query Viewer			like

**19.** Select **does not exist** in the Condition Type field.

The Edit Criteria Properties page changes to allow you to edit the Criterion and create the subquery.

K Homepage			Accounts Payable WorkCenter
Accounts Payable WorkCenter Main Reports/Queries	0 «	Edit Criteria Properties	
Queries	0 0 -	*Condition Type	does not exist 🔹
Query Manager     Public		Choose Expression 2 Type	Expression 2
<ul> <li>Outstanding Checks</li> <li>Review Payments by Vendor</li> </ul>		Subquery	Define/Edit Subquery
<ul> <li>Check Details</li> <li>Vouchers by UserID, Date Range</li> <li>AP Payments</li> </ul>		OK Cancel	

# 20. Click Define/Edit Subquery.

The Records tab is automatically selected.



Komepage	Accounts Payable WorkCenter
Accounts Payable WorkCenter	Records       Query       Expressions       Prompts       Fields       Criteria       Having       Dependency       Transformations       View SQL       Run         Query Name       XXX_QT_VND_SUBQUERY1       Description       Suppliers without vouchers       Seed >         Working on selection       Subquery for does not exist       Subquery/Union Navigation
<ul> <li>Public</li> <li>Outstanding Checks</li> <li>Review Payments by Vendor</li> <li>Check Details</li> <li>Vouchers by UserID, Date Range</li> <li>AP Payments</li> <li>Cleared Checks by BU</li> <li>Canceled Check Details</li> <li>Tax</li> </ul>	*Search By Record Name  begins with VOUCHER Search Advanced Search Save Save As New Query Preferences Properties Publish as Feed Publish as Pivot Grid New Union Return To Search

- **21.** Enter the following in the Search by fields:
  - Leave Record Name in the first field
  - Leave begins with in the second field
  - Type **VOUCHER** in the third field
- 22. Click Search .

A list of records meeting the search criteria appears.

# 23. Click Add Record beside VOUCHER – AP Voucher Header Table.

K Homepage		Accounts Payable WorkCenter			
Accounts Payable WorkCenter	0 «	Records         Query         Expressions         Prompts         Fields         Criteria         Having         Dependency         Transformations         View Stress	QL Run		
Queries	0 •	Query Name XXX_QT_VND_SUBQUERY1 Description Suppliers without vouchers	Eeed		
Query Manager     Public		Working on selection Subquery for does not exist Subquery/Union N	lavigation		
<ul> <li>Outstanding Checks</li> <li>Review Payments by Vendor</li> <li>Check Details</li> <li>Vouchers by UserID, Date Range</li> <li>AP Payments</li> </ul>		*Search By Record Name			
Cleared Checks by BU		Record Personalize   Find   View All   🖾   🔢 First 🕢 1-2 of 2 🕑 Last			
Canceled Check Details		Recname Add Record Show Fields			
▶ Tax		VOUCHER - AP Voucher Header Table Add Record Show Fields			
		VOUCHER_LINE - Voucher Line Add Record Show Fields			
Reports/Processes	0 07	Save Save As New Query Preferences Properties Publish as Feed Publish as Pivot Grid	New Uni		
マ Reports to Run ₽ Trial Register		Return To Search			



The screen allowing you to choose one field from the subquery table, which the subquery will use for comparison, is displayed, and the Query tab is automatically selected.

Komepage		Accounts Payable WorkCenter	
Accounts Payable WorkCenter Main Reports/Queries	• «	Records         Query         Expressions         Prompts         Fields         Criteria         Having         Dependency	Transformations View
<b>Queries</b>	0 -	Query Name XXX_QT_VND_SUBQUERY1 Description Suppliers	without vouchers
P Query Manager		Working on selection Subquery for does not exist	Subquery/Union
Public     Outstanding Checks     Review Payments by Vendor     Check Details		Add additional records by clicking the records tab. When finished select a single field for this subquery at transferred to the fields tab. Chosen Records	nd you will be 🕏
P Vouchers by UserID, Date Range		Alias Record	
AP Payments		B VOUCHER - AP Voucher Header Table	Hierarchy Join 📃
Cleared Checks by BU		Fields Find   View 100 First 🕚 1-5	50 of 264 🕑 Last
▶ Tax		Select 📴 BUSINESS_UNIT - Business Unit	9
		Select 🍉 VOUCHER_ID - Voucher ID	9
		Select VOUCHER_STYLE - Voucher Style	¥.
A Reports/Processes	0	Select INVOICE_ID - Invoice Number	Å.
	0.4	Select ERS_INV_SEQ - ERS Invoice Sequence	7.
		Select INVOICE_DT - Invoice Date	74
Trial Register		Select VENDOR SETID - Supplier SetID	¥+ ©
Voucher Activity		Select VENDOR_ID - Supplier ID	¥• 9
		Select VNDR_LOG - Supplier Location	7+

24. Click <u>Select</u> on the Vendor ID line. This takes you to the Field tab.

Now that you have created your Subquery, you must join the records in the Subquery to the records in the main query. To do this you are going to join the records on their two common fields—SETID and VENDOR\_ID.



**25.** Go back to the Query tab.



Homepage		Accounts	Payable WorkCenter
Accounts Payable WorkCenter Main Reports/Queries	0 «	Records         Query         Expressions         Prompts         Fields         Critical Critica	teria Having Dependency Transformations View
☑ Queries         ☑ Query Manager         ☑ Dublic         ☑ Outstanding Checks         ☑ Review Payments by Vendor         ☑ Check Details         ☑ Vouchers by UserID, Date Range         ☑ AP Payments	COV	Query Name       XXX_QT_VND_SUBQUERY1         Working on selection       Subquery for does not exist         Add additional records by clicking the records tab. When finished set transferred to the fields tab.         Chosen Records         Alias       Record         Image: B       VOUCHER - AP Voucher Header Table	Description Suppliers without vouchers Subquery/Union elect a single field for this subquery and you will be 20 Hierarchy Join
Cleared Checks by BU Canceled Check Details Tax	0 07	Fields Select BUSINESS_UNIT - Business Unit Select VOUCHER_ID - Voucher ID Select VOUCHER_STYLE - Voucher Style Select INVOICE_ID - Invoice Number Select EBS_INV_SEQ - EBS_Invoice Sequence	Find   View 100 First (1-50 of 264 ) Last
<ul> <li>✓ Reports to Run</li> <li>₽ Trial Register</li> <li>₽ Voucher Activity</li> </ul>		Select         INVOICE_DT - Invoice Date           Select         VENDOR_SETID - Supplier SetID           Select         VENDOR_ID - Supplier ID           Select         VNDR_LOC - Supplier Location	97 97 97 97

**26.** Click **Click** on the **VENDOR\_SETID** row.

The Edit Criteria Properties page appears.

Edit Criteria Properties		
		He
Choose Expression 1	Expression 1	
Туре	Choose Record and Field	
Field	Record Alias.Fieldname	
Expression	C.VENDOR_SETID - Supplier Set	
*Condition Typ	e equal to	
Туре	Choose Record and Field	
Field     Expression     Constant     Brompt	Record Alias.Fieldname	
Subguony		
Subquery		
OK Cancel		

- **27.** Leave the defaults in the Expression 1 Type and Expression 1 boxes.
- **28.** Leave **equal to** in the Condition Type field.
- **29.** Select **Field** in the Expression 2 Type box. The Edit Criteria Properties page changes.
- **30.** Click  $\bigcirc$  in the Expression 2 box.



The Select Record and Field page appears.

Select a field	
Select a field Personalize   Find   View All	🔢 First 🕚 1-50 of 69 🕑 Last
A.SETID - SetID	
A.VENDOR_ID - Supplier ID	
A.VENDOR_NAME_SHORT - Short Supplier Name	
A.VNDR_NAME_SHRT_USR - Short Supplier Name	
A.VNDR_NAME_SEQ_NUM - Sequence Number	
A.NAME1 - Supplier Name	
A.NAME2 - Additional Name	
A.VENDOR_STATUS - Supplier Status	
A.VENDOR_CLASS - Classification	
A.VENDOR_PERSISTENCE - Persistence	
A.REMIT_ADDR_SEQ_NUM - Remitting Address	
A.PRIM_ADDR_SEQ_NUM - Invoicing Address	
A.ADDR_SEQ_NUM_ORDR - Ordering Address	
A.REMIT_SETID - Remit SetID	
A.REMIT_VENDOR - Remit Supplier	
A.CORPORATE_SETID - SetID	
A.CORPORATE_VENDOR - Corporate Supplier	
A.CUST_SETID - Customer SetID	
A.CUST_ID - Customer ID	
A.ENTERED_BY - Entered by	
A.AR_NUM - Our Customer Number	
A.OLD_VENDOR_ID - Old Supplier ID	
A.WTHD_SW - Withholding Applicable	

# 31. Click <u>A. SETID – SetID</u>.

The Edit Criteria Properties reappears and the field you selected is displayed in the Expression 2 box.

Edit Criteria Properties		
		He
Choose Expression 1	Expression 1	
Туре	Choose Record and Field	
Field	Record Alias.Fieldname	
Expression	C.VENDOR_SETID - Supplier Set	
*Condition Typ Choose Expression 2	e equal to  v Expression 2	
Туре	Choose Record and Field	
<ul> <li>Field</li> <li>Expression</li> </ul>	Record Alias.Fieldname	
Prompt		
<ul> <li>Constant</li> <li>Prompt</li> <li>Subquery</li> </ul>		



**32.** Click OK

The first join is complete.

# To join on the VENDOR\_ID field:



**33.** Click **Click** on the **VENDOR\_ID** row.

The Edit Criteria Properties page appears.



Edit Criteria Properties		[
		Hel
Choose Expression 1	Expression 1	
Туре	Choose Record and Field	
Field	Record Alias.Fieldname	
Expression	C.VENDOR_ID - Supplier ID	
*Condition Type Choose Expression 2 Type Field Expression Constant Prompt Subquery OK Cancel	e equal to  Expression 2  Choose Record and Field  Record Alias.Fieldname  A.VENDOR_ID - Supplier ID	

- **34.** Leave the defaults in the Expression 1 Type and Expression 1 boxes.
- **35.** Leave **equal to** in the Condition Type field.
- **36.** Select **Field** in the Expression 2 Type box.

The Edit Criteria Properties page changes.

**37.** Click  $\bigcirc$  in the Expression 2 box.

The Select Record and Field page appears.

38. Click <u>A. VENDOR\_ID – Supplier ID</u>.

The Edit Criteria Properties reappears and the field you selected is displayed in the Expression 2 box.

**39.** Click OK



# The second join is now complete. Click the <u>Subquery/Union Navigation</u> link.

K Homepage	Accounts Payable WorkCenter
Accounts Payable WorkCenter • « Re Main Reports/Queries	ecords Query Expressions Prompts Fields Criteria Having Dependency Transformations View SQL Run
🙀 Queries 🖸 o 👻	Query Name XXX_QT_VND_SUBQUERY1 Description Suppliers without vouchers
P Query Manager Wo	orking on selection Subquery for does not exist Subquery/Union Navigation
Public     Outstanding Checks     Ac     Review Payments by Vendor     Check Details     Check Details     Check Details	dd additional records by clicking the records tab. When finished select a single field for this subquery and you will be 20 ansferred to the fields tab. hosen Records
AP Payments	C VOUCHER - AP Voucher Header Table Hierarchy Join
Cleared Checks by BU     Canceled Check Details	Fields Find   View 100 First 🕢 1-50 of 264 🕑 Last
▶ Tax	Select 阳 BUSINESS_UNIT - Business Unit
	Select 📴 VOUCHER_ID - Voucher ID

Left Right	/ or union to navigate	Select subq
Left Right		
🗁 Top Level of Query		Left Right
	of Query	🗁 Top L
Subquery for does not exist	ery for does not exist	🗁 Su

- **40.** Select Subquery for does not exist.
- 41. Click the Criteria tab.

The Criteria page appears. The records in the subquery are now linked to the records in the main query.

Komepage		Acc	ounts Payable WorkCenter	
Accounts Payable WorkCenter Main Reports/Queries	o «	Records Query Expressions Prompts Fie	Ids Criteria Having Dependency	Transformations View SQL Run
Queries     Image: The second se	Query Name         XXX_QT_VND_SUBQUERY1           Working on selection         Subquery for does not exist           Add Criteria         Group Criteria           Criteria         Criteria	Description Suppliers Reorder Criteria Personalize   Find   🗐	s without vouchers Subquery/Union Navigation First  1-2 of 2  Last	
	Logical         Expression1           ▼         B.VENDOR_SETID - Supplier SetID           AND         ▼           B.VENDOR_ID - Supplier ID	Condition Type         Expression 2           equal to         A.SETID - SetID           equal to         A.VENDOR_ID - Supplier I	Edit Delete Edit • D Edit •	
<ul> <li>Canceled Check Details</li> <li>Tax</li> </ul>		Save Save As New Query Prefere	inces Properties Publish as Feed	Publish as Pivot Grid New Union

The query is complete. Now save it and run it.



42.

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You can run this query from either the main query or the subquery.



The changes to the query are saved.

43. Click on Run.

After a few moments of processing, the new query results are displayed.

44. How many vendors do not have any vouchers? \_\_\_\_\_

Komepage					ļ	Accou	nts Pay	able V	VorkCente	r		
Accounts Payable WorkCenter           Main         Reports/Queries           Queries         Queries	> 0 • • •	Records	Query	Expressions	Prompts	Fields	Criteria	Having	Dependency	Transformations	View SQL	Run
<ul> <li>Query Manager</li> <li>Public</li> </ul>		View All	Rerun Quer SetID	y   Download to	Excel   Dowr Supplier	nload to XM	ИL		Supplie	or	First 🕚 1-10	00 of 2634 December 2634 De
Outstanding Checks     Review Revenues by Vender		1	SHARE	0000000	135	AGA	GAS CENT	RAL INC				I
Check Details		2	SHARE	0000000	770 978	LASE	CO ERPROFES	SOR OF CI	LEARLAKE			1
Vouchers by UserID, Date Range		4	SHARE	0000000	823	CHIN	IE TIME					I.
AP Payments Cleared Checks by BU		5	SHARE	0000000	883	COL	LECTIONS	UNLTD INC	;			1
Canceled Check Details		6	SHARE	0000001	080 305	DAT	ALINK CORI					1
▶ Tax		8	SHARE	0000001	523	GEN	ERAL REVE	ENUE COR	P			

Use the **<u>Subquery/Union Navigation</u>** link to switch between the Subquery and the main query.



45. Click on the Criteria tab.

The Criteria page appears.



# 46. Click Subquery/Union Navigation.

Homepage			Ac	counts Paya	able WorkCenter		
Accounts Payable WorkCenter Main Reports/Queries	0 «	Records Query	Expressions Prompts F	ields Criteria	Having Dependency	Transformations View	v SQL Run
Query Manager  Public  Outstanding Checks  Query Manager		Working on selection Add Criteria Criteria	Subquery for does not exist Group Criteria	Reorder Criteria	Personalize   Find   🖉	Subquery/Union	■ Feed →
<ul> <li>Review Payments by Vendor</li> <li>Check Details</li> <li>Vouchers by UserID, Date Range</li> <li>AP Payments</li> <li>Cleared Checks by BU</li> <li>Canceled Check Details</li> <li>Tax</li> </ul>		Logical Expr B.VE AND V B.VE Save Save	ession1 ENDOR_SETID - Supplier SetID ENDOR_ID - Supplier ID e As New Query Prefe	Condition Type equal to equal to rences Propert	Expression 2 A.SETID - SetID A.VENDOR_ID - Supplier ies Publish as Feed	Edit Edit ID Edit Publish as Pivot Gr	Delete id New Union

The navigation page appears.

Select subquery or union to navigate to						
Left Right						
🗁 Top Level of Query						
Subquery for does not exist						

# 47. Click <u>Top Level of Query</u>.

The main query appears.

#### **48.** Click on the **Criteria** tab.

The Criteria page appears for the main query. Notice Expression 2 says SUBQUERY. This tells you a Subquery exists for this query.

K Homepage		Accounts Payable WorkCenter										
Accounts Payable WorkCenter	o «	Records	Query	Expressions	Prompts	Fields	Criteria	Having	Dependency	Transformations	View S	QL Ru
Queries Query Manager Query Manager Public Qutstanding Checks Review Payments by Vendor Check Details Newborn hullearD Data Bases	0 0 -	Qu Working or Add C	uery Namo selection Criteria	XXX_QT_VNI     Top Level of     Group C	D_SUBQUER Query riteria	Y1 Re	order Criteria	Des	scription Supplie	ers without vouchers Subquer	y/Union N	avigation
		Criteria Logical	Exp	ression1		Cond	dition Type	Personali: Expressi	ze   Find   🗐	First I-	2 of 2 🕚	Last Delete
AP Payments     Cleared Checks by BU     Canceled Check Details     Tax		AND	V A.3	e As New Q	uery Pi	does	s not exist	SUBQU	ERY Publish as Feed	Publish as P	it ivot Grid	E Ne



# 49. Click Subquery/Union Navigation.

Komepage					1	Accou	nts Pay	able V	orkCente	r		
Accounts Pavable WorkCenter	• «		1				-	1				
Main Paparts/Quarias		Records	Query	Expressions	Prompts	Fields	Criteria	Having	Dependency	Transformations	View SQ	L Ru
Queries	0 0 -	a	uery Nam	e XXX_QT_VNI		Y1		De	scription Supplie	ers without vouchers		តា
Query Manager		Working o	n selectio	n Top Level of	Query					Subquer	ry/Union Na	vigation
Public     □     Control     Contro     Control     Control     Control     Contr		Add	Criteria	Group C	riteria	Re	order Criteria	a				
Outstanding Checks     Review Payments by Vendor		Criteria						Personali	ze   Find   💷	📕 🛛 First 🕚 1-	-2 of 2 🕑 I	Last
Check Details		Logical Expression1 Condition Type					dition Type	Express	ion 2	Edit	Dr	elete
Vouchers by UserID, Date Range			▼ A.S	SETID - SetID		equ	al to	SHARE		Ed	it	-
<ul> <li>AP Payments</li> <li>Cleared Checks by BU</li> </ul>		AND	Ŧ			doe	s not exist	SUBQU	ERY	Ed	it	
Canceled Check Details     Tax		Save	Sa	ve As New Q	uery P	reference	s Prope	rties	Publish as Feed	Publish as P	ivot Grid	Ne

The navigation page appears.



#### 50. Click <u>Subquery for does not exist</u>.

The Subquery appears.

K Homepage		Accounts P	ayable WorkCenter
Accounts Payable WorkCenter Main Reports/Queries Queries Query Manager Public Builder Decks Review Payments by Vendor	0 «	Records         Query         Expressions         Prompts         Fields         Criterion           Query Name         XXX_QT_VND_SUBQUERY1           Working on selection         Subquery for does not exist           Add additional records by clicking the records tab. When finished selection           transferred to the fields tab.	ia Having Dependency Transformations View SQL Run Description Suppliers without vouchers Subquery/Union Navigation act a single field for this subquery and you will be
<ul> <li>Check Details</li> <li>Vouchers by UserID, Date Range</li> <li>AP Payments</li> <li>Cleared Checks by BU</li> <li>Canceled Check Details</li> <li>Tax</li> </ul>		Chosen Records  Alias Record  B VOUCHER - AP Voucher Header Table  Fields  Fields  Select BUSINESS_UNIT - Business Unit Select VOUCHER_ID - Voucher ID Select VOUCHER_STYLE - Voucher Style	Hierarchy Join Find   View 100 First 1-50 of 264 Last

# II. Unions

Unions allow you to execute two or more separate queries and consolidate the results into one



dataset. Both queries must have the same number of selected fields, in the same order, with the same data type.

In this example, we need a query that includes both Purchase Order Header table data and Requisition Order Header table data into one result set. With a union query, you create two separate select statements (one for *PO*, one for *REQ*.) The two queries must have the same number of columns, the columns must be in the same order, and the data type for each column must be the same.

1. **Create** a *New Query* or identify a query that you would like to unite with another. For this example, the first query or *Top Level of Query* has been created using the *REQ\_HDR* table. The following fields have been selected:



2. Click the New Union hyperlink from any tab other than the Run

tab.

Komepage		Accounts Payable WorkCenter	
Accounts Payable WorkCenter Main Reports/Queries Queries Query Manager Public Outstanding Checks Review Payments by Vendor Check Details Vouchers by UserID, Date Range AP Payments Cleared Checks by BU Canceled Check Details	0 «	Records       Query       Expressions       Prompts       Fields       Criteria       Having       Dependency       Transformations       View SQL       Ru         Query Name       UNION_EXAMPLE_QUERY       Description       How to build a Union       Image: Search By Record Name       Image: Begins with       Image: Search       Advanced Search       Image: Search Results       Image: Show Fields       Image: S	n Feed 👻
		Save Save As New Query Preferences Properties Publish as Feed Publish as Pivot Grid New	v Union



- 3. PeopleSoft Query automatically switches to the Records tab of the Query Manager to start defining the second query (*Union1*).
- 4. **Define** the query the same way other queries are defined.

However, the first query in the union—the *Top Level of Query*—has a special status. PeopleSoft Query determines the ordering of the rows and columns based on what you specify for the *Top Level of Query*. It also uses the column headings defined for the *Top Level of Query* in the results.

5. **Add** the selected record to the second query (*Union 1*). For this example, the *PO\_HDR* table is added.

Komepage			A	ccounts	Payable W	/orkCenter
Accounts Payable WorkCenter	o «	Records Query Ex	pressions Prompts	Fields Ci	riteria Having	Dependency T
Queries Query Manager  Public  Public Review Payments by Vendor Check Details Vouchers by UserID, Date Range AP Payments	0 07	Query Name Un Working on selection *Search By R Search Advanced Search Results	NION_EXAMPLE_QUERY Inion 1 ecord Name v Search	, begins with	De PO_HDR	scription How to bui
<ul> <li>Cleared Checks by BU</li> <li>Canceled Check Details</li> </ul>		Record	Personalize   Find   V	iew All   🗖	📑 First 🕚	1-7 of 7 🕑 Last
		Recname			Add Record	Show Fields
▶ Tax		PO_HDR - Purchase Order	Header		Add Record	Show Fields
		PO_HDR_A - PO Activity H	eader		Add Record	Show Fields
		PO_HDR_FS - Purchase O	rder Header		Add Record	Show Fields
		PO_HDR_KK2_VW			Add Record	Show Fields
		PO_HDR_MISC - PO Head	er Miscellaneous Charge		Add Record	Show Fields
Reports/Processes	0 .	PO_HDR_PRV - Purchase	Order Header		Add Record	Show Fields
Reports to Run		PO_HDR_STG - PO Heade	er Staging Table		Add Record	Show Fields

6. Add the similar fields as in the Top Level of Query.



Homepage		Accounts Payable WorkCenter	
Accounts Payable WorkCenter	0 «	Records         Query         Expressions         Prompts         Fields         Criteria         Having         Dependency         Transformations	Vi
Cuerres Cuerry Manager  Public Cuerry Manager  Cuerry Manager	0 0 +	Query Name     UNION_EXAMPLE_QUERY     Description     How to build a Union       Working on selection     union 1     Subquery.       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.     \$20	/Ur
<ul> <li>Review Payments by Vendon</li> <li>Check Details</li> <li>Vouchers by UserID, Date Range</li> <li>AP Payments</li> <li>Cleared Checks by BU</li> <li>Canceled Check Details</li> </ul>		Chosen Records          Alias       Record         Image: B PO_HDR - Purchase Order Header       Hierarchy Join         Check All       Uncheck All         Fields       Find   View All	]
Tax	0 07	Image     BUSINESS_UNIT - Business Unit     Image     Image	
		HOLD_STATUS - Hold From Further Processing     74       RECV_STATUS - Receipt Status     74	

7. The two queries have the same number of fields, in the same order, and of the same data type.

Komepage		Accou	nts Paya	able	Wo	orkCenter				
Accounts Payable WorkCenter	° «	Records Query Expressions Prompts Fields	Criteria	Havin	ıg	Dependency Trans	formations View	SQL Run		
Queries O	0 -	Query Name UNION_EXAMPLE_QUERY			Descri	iption How to build a U	Jnion	S Feed	~	
Query Manager     Public     Outstanding Checks	,	Vorking on selection         Top Level of Query         Subquery/Union Navigation           View field properties, or use field as criteria in query statement.         Reorder / Sort								
Review Payments by Vendor		Fields			F	Personalize   Find   Vie	ew All   💷   🔣	First 🕚 1-3 of 3	3 🕑 Last	
<ul> <li>Check Details</li> <li>Vouchers by UserID, Date Range</li> </ul>		Col Record.Fieldname	Format Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete	
P AP Payments		1 A.BUSINESS_UNIT - Business Unit	Char5			Unit	7.	Edit		
Cleared Checks by BU		2 A.REQ_ID - Requisition ID	Char10			Req ID	¥.	Edit		
Canceled Check Details		3 A.REQ_STATUS - Requisition Status	Char4	N		Status	%	Edit		
and Reports/Processes	0.7	Return To Search								
Komepage		Accou	ints Paya	able	Wo	orkCenter				
Accounts Payable WorkCenter Main Reports/Queries	° «	Records Query Expressions Prompts Fields	Criteria	Havin	Ig	Dependency Trans	formations View	SQL Run		
Queries O	0 -	Query Name UNION_EXAMPLE_QUERY			Descri	iption How to build a U	Inion	Feed 1	~	
Query Manager		Working on selection Union 1						Subquery/Un	ion Navigation	
Public     Qutstanding Checks		View field properties, or use field as criteria in query stateme	nt.				Reorder / S	Sort		
Review Payments by Vendor		Fields			F	Personalize   Find   Vie	ew All   💷   🔣	First 🕚 1-3 of 3	3 🕑 Last	
Check Details		Col Record.Fieldname	Format Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete	
AP Payments		1 B.BUSINESS_UNIT - Business Unit	Char5			Unit	9.	Edit		
<ul> <li>Cleared Checks by BU</li> <li>Canceled Check Details</li> </ul>		2 B.PO_ID - PO Number	Char10			PO No.	9.	Edit		
		3 B.PO_STATUS - PO Status Char2 N Status 😵						Edit		
▶ Tax		Save Save As New Query Preference	Propertie	00	Pi	ublish as Feed			New I	
		Save As New Query Preference.					Publish as Pivot Gric	1	New c	



8. When you're working on a union, each individual selection looks like an independent query. To **navigate** between the main query, subqueries, and unions, **use** the *Subquery/Union Navigation* hyperlink.

Select subquery or union to navigate to						
Left Right						
🗁 Top Level of Query						
🗁 Union 1						

9. Criteria to narrow results must **be placed** in both queries.

K Homepage		Accounts Payable WorkCenter
Accounts Payable WorkCenter	0 «	Records         Query         Expressions         Prompts         Fields         Criteria         Having         Dependency         Transformations         View SQL         Run
Queries	0 -	Query Name UNION_EXAMPLE_QUERY Description How to build a Union
<ul> <li>✓ Query Manager</li> <li>✓ Public</li> <li>✓ Outstanding Checks</li> </ul>		Working on selection         Top Level of Query         Subquery/Union Navigation           Add Criteria         Group Criteria         Group Criteria
Review Payments by Vendor		Criteria Personalize   Find   🖓   🔜 First 🕚 1 of 1 🔍 Last
Check Details Vouchers by UserID, Date Range AP Payments Cleared Checks by BU		A.BUSINESS_UNIT - Business Unit     equal to     UWSYS     Edit
Canceled Check Details		Save Save As New Query Preferences Properties Publish as Feed Publish as Pivot Grid New Union
▶ Tax		Return To Search
Komepage		Accounts Payable WorkCenter
Accounts Payable WorkCenter Main Reports/Queries	o «	Records         Query         Expressions         Prompts         Fields         Criteria         Having         Dependency         Transformations         View SQL         Run
Queries C	0 -	Query Name UNION_EXAMPLE_QUERY Description How to build a Union
Query Manager		Working on selection Union 1 Subquery/Union Navigation
		Add Criteria Group Criteria
Outstanding Checks     Poview Perments by Vender		Criteria Personalize   Find   🖉   🐺 First 🕚 1 of 1 🕑   ast
Check Details		Logical Expression1 Condition Type Expression 2 Edit Delete
<ul> <li>Vouchers by UserID, Date Range</li> <li>AP Payments</li> </ul>		B.BUSINESS_UNIT - Business Unit equal to UWSYS     Edit
<ul> <li>Cleared Checks by BU</li> <li>Canceled Check Details</li> </ul>		Save Save As New Query Preferences Properties Publish as Feed Publish as Pivot Grid New Union D
▶ Tax		
		Return To Search

10. When you have set up your query, **run** the query, and the results will be the combination of the two statements entered.



Komepage			А	ccount	ts Payable W	/orkCente	r			
Accounts Payable WorkCenter Main Reports/Queries	0 «	Records Query	Expressions Prompts	Fields	Criteria Having	Dependency	Transformations	View SQL Run		
Cuery Manager		View All   Rerun Query   Download to Excel   Download to XML First 🚳 1-100 of 2								
Public			Unit			Req ID		Status		
Outstanding Checks		1	UWSYS		000000001			С		
Review Payments by Vendor		2	UWSYS		000000001			Х		
Check Details		3	UWSYS		000000002			С		
Vouchers by UserID, Date Range		4	UWSYS		000000002			х		
<ul> <li>AP Payments</li> <li>Cleared Checks by BU</li> </ul>		5	UWSYS		000000003			С		
		6 UWSYS 000000003					X			
Canceled Check Details		7	UWSYS		0000000004			C		
▶ Tax		8	LIWSYS		0000000004			X		

11. You can View SQL

to see the union of the two separate queries.

K Homepage	Ассои	nts Payable WorkCenter	
Accounts Payable WorkCenter   Main Reports/Queries  Queries  Queries  Query Manager  Public  Outstanding Checks  Review Payments by Vendor  Check Details  Vouchers by UserID, Date Range  AP Payments  Cleared Checks by BU  Canceled Check Details  Tax	Records       Query       Expressions       Prompts       Fields         Query Name       UNION_EXAMPLE_QUERY         Working on selection       Union 1         XLAT/Related Language         Query SQL         SELECT A.BUSINESS_UNIT, A.REQ_ID, A.REQ_STATUS FROM PS_REQ_HDR A         WHERE (ABUSINESS_UNIT = 'UWSYS')         UNION         SELECT B.BUSINESS_UNIT, B.PO_ID, B.PO_STATUS FROM PS_PO_HDR B         WHERE (B.BUSINESS_UNIT = 'UWSYS')	Criteria Having Dependency Transformatio Description How to build a Union Sub	ns View SQL Run Feed -
Reports/Processes	Save Save As New Query Preference:	s Properties Publish as Feed Publish	as Pivot Grid New Union Delete Union
Reports to Run			

12. If you need to delete the union, you can **click** the *Delete Union* hyperlink at the bottom of the screen in *Union 1* only. This will return your query to a single query, leaving only the *Top Level of Query*.



Komepage	Accounts	Payable WorkCenter	
Accounts Payable WorkCenter	Records Query Expressions Prompts Fields C	riteria Having Dependency Transformations View	SQL Run
Queries       Image: Imag	Query Name UNION_EXAMPLE_QUERY Working on selection Union 1 XLAT/Related Language Query SQL SELECT A.BUSINESS_UNIT, A.REQ_ID, A.REQ_STATUS FROM PS_REQ_HDR A WHERE (A.BUSINESS_UNIT = 'UWSYS') UNION SELECT B.BUSINESS_UNIT, B.PO_ID, B.PO_STATUS FROM PS_PO_HDR B WHERE (B.BUSINESS_UNIT = 'UWSYS')	Description How to build a Union Subquery/Union	Seed ✓           Navigation
dal Reports/Processes C ⊙ ▼ ▼ Reports to Run	Save Save As New Query Preferences	Properties Publish as Feed Publish as Pivot Grid	New Union Delete Union

#### **III. Using Wildcard Characters to Find Information**

PeopleSoft applications support three wildcard characters to help you search for data in character fields. You can use these wildcard characters to find the exact information that you need.

NOTE: Wildcard characters only work with the 'begins with' and 'contains' operators.

The supported standard wildcard characters are:

Wildcard	Search Action
% (percent symbol)	Match one or more characters.
_ (underscore)	Match any single character.
\ (backslash)	Escape character; do not treat the next character as a wildcard.

- % matches any string of zero or more characters. For example, *C*% matches any string starting with C, including C alone.
- \_ matches any single character. Such as, \_*ones* matches any five-character string ending with *ones*, such as Jones or Cones.
- To use one of the wild-card characters as a literal character, meaning to include a % in your string, precede the % character with a \, as \%.

The following will demonstrate an example, if you wanted to find the SFS Centrally maintained queries, you could search for 'SFS%' in the *begins with* search box for *Search By* 'Query Name'. However, the system returns a list of all queries that begin with *SFS* which includes queries that are NOT maintained centrally, as you can see below:



Homepage						Accounts Paya	ble	Wor	kCe	nter		
Accounts Payable WorkCenter          Main       Reports/Queries         Queries       Query Manager	> 0 • • 0	Query Enter a	/ Manager any information you have and click Search. Lo Find an Existing Query   Create New Q	eave fields blank for a list of all valu	es.							
<ul> <li>♥ Public</li> <li>♥ Outstanding Checks</li> <li>♥ Review Payments by Vendor</li> <li>♥ Check Details</li> <li>♥ Vouchers by UserID, Date Range</li> <li>♥ AP Payments</li> <li>♥ Cleared Checks by BU</li> <li>♥ Canceled Check Details</li> <li>♥ Tax</li> </ul>		*Search By Query Name  begins with SFS% Search Advanced Search Search Results *Folder View - All Folders  Check All Uncheck All *Action Choose  Go						at (1) 1 20	1 of 175 🕕 1 oot			
		Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References
			SFS_1099_VNDR_DFLT_LOC	1099 Vendors WTHD Default LOCs	Public	1099_CLEANUP	Edit	HTML	Excel	XML	Schedule	Lookup References
			SFS_ACH_EMP_VENDOR_SUM	EMP_VENDOR_ACH_SUM	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
			SFS_ACH_ERE_SUM	SFS_ACH_ERE_SUM	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
			SFS_ACH_EXT_VENDOR_SUM	SFS_ACH_EXT_VENDOR_SUM	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
			SFS_AM_ASSET_NET_BOOK_VALUE	Asset Net Book Value	Public	SFS AM INVENTORY	Edit	HTML	Excel	XML	Schedule	Lookup References
Reports/Processes	0 •		SFS_AM_BY_LOCATION	Assets by location	Public	SFS AM INVENTORY	Edit	HTML	Excel	XML	Schedule	Lookup References
			SFS_APPO_VCHRS_NO_POS	Finds direct payment vouchers	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<ul> <li>Inal Register</li> <li>Voucher Activity</li> </ul>			SFS_APPO_VENDORS_PD_BY_SETID	Payments by vendor	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
Processing Tools			SFS_APPO_VENDORS_PD_OVER_5K	Vendors Paid Over 5K	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
Report Manager     Reporting Console			SFS_APPO_VOUCHER_BY_CHARTFIELD	Voucher Listing by Chartfield	Public	SFS_APPO_INVENTORY	Edit	HTML	Excel	XML	Schedule	Lookup References

Understanding that the centrally maintained query inventory list uses a naming convention of 'SFS\_module two letter designation\_query name' then you could reduce the list to those that are centrally maintained by using ALL three wildcard options.

1. You can also find these special queries by changing the *Search by* to 'Folder Name' *begins with* 'SFS%Inventory'



Komepage				Accounts Payable Wo	rkCe	nter						â
Accounts Payable WorkCenter	o «	Quer	y Manager									New Window
Queries C	0 -	Enter	any information you have and click Search. Le	eave fields blank for a list of all values.								
P Query Manager			Find an Existing Query   Create New Q	uery								
Public     Outstanding Checks     Review Payments by Vendor     Check Details			*Search By Folder Name Search Advanced Search	begins with SFS%INV	ENTORY	,						
P Vouchers by UserID, Date Range			Search Results									
P AP Payments			*Folder View All Folders V									
Cleared Checks by BU Canceled Check Details		C	Check All Uncheck All *Action Choose V Go									
▶ Tax		Que	ry			Personalize   Find   View	v 100	121		First	④ 1-30 o	f 122 🕐 Last
		Select	t Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References
			DORA_SFS_AM_ASSET_NET_BOOK_V2	Asset Net Book Value	Public	SFS AM INVENTORY	Edit	HTML	Excel	XML	Schedule	Lookup References
Reports/Processes	0 -		EXPENSES_AUDITOR	Expenses by Auditor	Public	SFS EX INVENTORY	Edit	HTML	Excel	XML	Schedule	Lookup References
			LP_UW_PO_DETAIL_ENC_STATUS	Detail Enc Status List	Public	SFS PO INVENTORY	Edit	HTML	Excel	XML	Schedule	Lookup References
Voucher Activity			MIL_PRCH_NFY_PO_CORRECTIONS	New FY POs needing Correction	Public	SFS PO INVENTORY	Edit	HTML	Excel	XML	Schedule	Lookup References
<ul> <li>Processing Tools</li> <li>Process Monitor</li> </ul>			PROJECT_LITE_BY_BU	Project Lite by BU/Date Range	Public	SFS GM INVENTORY	Edit	HTML	Excel	XML	Schedule	Lookup References
Report Manager     Reporting Console			SFS_AM_ASSET_NET_BOOK_VALUE	Asset Net Book Value	Public	SFS AM INVENTORY	Edit	HTML	Excel	XML	Schedule	Lookup References
Query Viewer			SFS_AM_BY_LOCATION	Assets by location	Public	SFS AM INVENTORY	Edit	HTML	Excel	XML	Schedule	Lookup References
			SFS_APPO_VOUCHER_BY_CHARTFIELD	Voucher Listing by Chartfield	Public	SFS_APPO_INVENTORY	Edit	HTML	Excel	XML	Schedule	Lookup References

<b>Revision Histor</b>	y		
Author	Version	Date	Description of Change
Andrea Vredberg	1.0	06/24/2013	Initial Draft from 8.9 version
Stacy VanWormer	2.0	07/31/2013	Revision
Susan Kincanon	2.1	08/15/2013	Edit, format and ready for publication
Stacy VanWormer	2.2	09/05/2013	Revision
Susan Kincanon	3.0	09/05/2013	Updated with Wildcards and IE sections, finalized
Scott Larson	3.0	09/13/2013	Reviewed and approved to publish
Susan Kincanon	3.0	09/16/2013	Finalize and publish
Bonnie Correll	4.0	10/16/2018	Revise for SFS 9.2