

Contents

Business Process Overview	1
Process Detail	1
I. Query Drill Functionality - Usage.....	1
II. New Query Drill Functionality – Creating Drills to SFS Pages	3
III. New Query Drill Functionality – Creating Drills to Other Queries in SFS	9
IV. New Query Drill Functionality – Creating Drills to External Websites.....	15
V. How to Create an Expression to use as a Drill Field.....	19
VI. Troubleshooting Tips	28
Revision History.....	29

Business Process Overview

This document provides instructions on how to Creating Hyperlinked Query Drills. Hyperlinked drills allow the user to quickly reference other information in SFS or in external websites. The information provided here is at an intermediate to advanced query level.

Process Frequency	This process is performed on an as needed or ad-hoc basis.
Dependencies	An intermediate level of knowledge with PS Query and the correlating tables in SFS is recommended as a prerequisite.
Assumptions	Users have read and understand the basic and intermediate query process documents.
Responsible Parties	Users of SFS and PS Query.
Alternate Scenarios	N/A

Process Detail

I. Query Drill Functionality - Usage

The Query Drill functionality allows a user to run a query and then drill from that query to:

- An existing page in SFS
- Another query
- An external link/website

Navigation: Main Menu > Reporting Tools > Query > Query Manager

1. **Select** a query that has been updated to include the new functionality. To find queries that

University of Wisconsin System
 SFS Business Process
**RPT.1.02.05- Advanced PeopleSoft Query:
 Creating Hyperlinked Query Drills**

have this new functionality, see the new **Query Inventory** list that includes information on which public queries have hyperlinked drills! For this example, the SFS_GM_BILLING_ACTIVITY drills to a page in SFS.

2.  the query as you would normally.

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

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

Business Unit = UWEXT,Contract # (% if Unknown)=%,Project (% for All or Unknown)=133%

[View All](#) | [Rerun Query](#) | [Download to Excel](#) | [Download to XML](#) First 1-100 of 34504 Last

	Business Unit	Contract Number	Contract Line	Project	Contract Type	Contract Status	Account	Dept	Fund	Program	Analysis Type	Acctg Date	Resource Amount	Billing Dist. Status	GL Dist. Status	Invoice	Bill Date
1	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	2620	464620	133	5	BIL	10/10/2008	107696.740	P	C		
2	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	2620	464620	133	5	BIL	10/14/2008	108518.850	P	C		
3	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	2184	464600	133	5	BIL	11/18/2008	895.000	P	C		
4	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	3710	464610	133	5	BIL	11/20/2008	429.000	P	C		
5	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	2130	464630	133	5	BIL	11/21/2008	372.200	P	C		
6	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	2620	464610	133	5	BIL	11/26/2008	90.000	P	C		
7	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	2260	464610	133	5	BIL	12/02/2008	900.000	P	C		
8	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	2620	464610	133	5	BIL	12/03/2008	100.000	P	C		
9	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	2620	464610	133	5	BIL	12/03/2008	1725.000	P	C		
10	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	2130	464610	133	5	BIL	12/04/2008	447.080	P	C		
11	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	1771	464610	133	5	BIL	12/04/2008	2340.970	P	C		01/01/1900
12	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	1771	464630	133	5	BIL	12/04/2008	213.950	P	C		01/01/1900
13	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	2130	464630	133	5	BIL	12/05/2008	699.390	P	C		
14	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	3710	464610	133	5	BIL	12/05/2008	322.960	P	C		
15	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	1076	464630	133	5	BIL	12/05/2008	335.000	P	C		01/01/1900
16	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	1076	464610	133	5	BIL	12/05/2008	650.000	P	C		01/01/1900

3. Click the hyperlinked field to drill.

The screenshot displays the 'General Information' page for a contract in the SFS system. The breadcrumb trail is: Favorites | Main Menu > Customer Contracts > Create and Amend > General Information. The 'Amendments' tab is selected. Key fields include: Contract Number: EXT100006, Sold To Customer: CORPORATION FOR PUBLIC BROADCASTING, Amendment Number: 0000000003, and *Contract Status: PRE_CLOSE. Below these are buttons for 'Amend Contract' and 'Add to My Contracts'. A detailed list of contract attributes follows, such as Description (FY08 WHA-TV COMMUNITY SERVICE), Processing Status (Active), Amendment Status (Complete), Region Code, Business Unit (UW Extension), Contract Type (SCHEDULED), Contract Classification (Standard), Currency Code (USD), Last Amended (04/22/2011), Exchange Rate Type (CRRNT), Start Date (10/01/2007), Contract Signed (11/12/2007), End Date (09/30/2009), Last Update Date/Time (04/22/2011 2:42:46PM), and Last Update User ID (00550769). At the bottom, there are sections for 'Other Information' and 'Summary of Amounts', with a 'Go To:' menu containing links for Billing Plans, Revenue Plans, Milestones, and Renewals. Action buttons for Save, Return to Search, Notify, Add, and Update/Display are also present.

4. The hyperlink will take you to the resulting drill page, query or external website.

II. New Query Drill Functionality – Creating Drills to SFS Pages

Create a drill from a PS Query to a page in SFS.

Navigation: Main Menu > Reporting Tools > Query > Query Manager

1. After identifying the query you would like to update, **click** the *Edit* hyperlink.

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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 SFS_TEST

Search Advanced Search

Search Results

*Folder View -- All Folders --

Check All Uncheck All *Action -- Choose --

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML
<input type="checkbox"/>	SFS_TEST	Vouchers by UserID, date range	Public	SFS AP INVENTORY	Edit	HTML

2. Click **Expressions**
3. Click **Add Expression**

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Records Query **Expressions** Prompts Fields

Query Name SFS_TEST

Add Expression

Expressions List

Expression Text
 'WISDM link'

Drilling URL

'psp///c/ENTER_VOUCHER_INFORMATION.VCHR_EXPRESS.GE
 Action=U&BUSINESS_UNIT=%A.BUSINESS_UNIT%&VOUCHER
 ER_ID%:A.VOUCHER_ID'

'psp///c/MAINTAIN_VENDORS.VNDR_ID.GBL?
 Action=U&SETID=%A.BUSINESS_UNIT%&VENDOR_ID=%A.VEN
 NDOR_ID'

4. You will be taken to the Edit Expression Properties page.

Edit Expression Properties

*Expression Type
Drilling URL ▼

Expression Text

Query URL **Component URL**

External URL Attachment URL

Free Form URL Image URL

REST URL

OK Cancel

5. In the *Expression Type* field, **choose** 'Drilling URL' from the drop down menu.
6. Next, **click** the *Component URL* hyperlink.
7. You will be taken to the Select a Component page:

Select a Component

Portal Name 🔍

Node Name 🔍 Use psc

Content Reference **Add Content Reference Link**

*Menu Name 🔍

*Market 🔍

*Component 🔍

Page 🔍

Menu Action ▼

Search Keys Select Field Map Columns

8. **Click** the *Add Content Reference Link* to navigate to the component (page) you wish to drill to, if you do not already know the actual menu and component name. You will be taken to a folder hierarchy icon navigation page:

Select a Content Reference or Content Reference Link

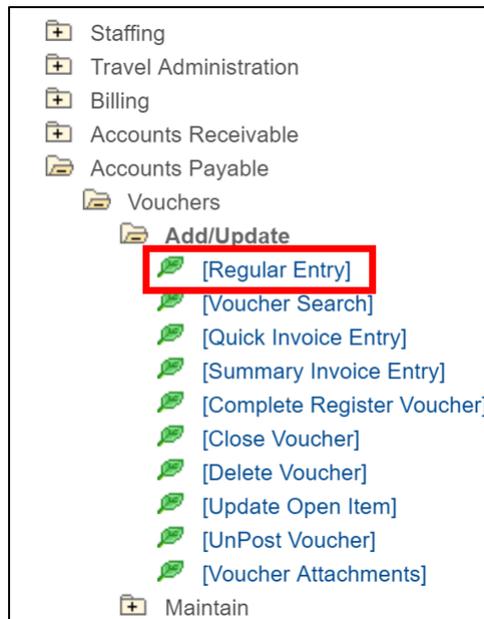
Click the registry name and pick a content reference or content reference link.

Click "Return" to exit and not create a link.

Left | Right

 EMPLOYEE

9. Click the  sign to the left of the 'EMPLOYEE' folder to expand.
10. **Navigate** through the menu until you find the component or page you need.



11. **Click** on the hyperlink to the right of the page. You will be taken back to the Select a Component page and the required information will be added automatically.

Select a Component

Portal Name

Node Name Use psc

Content Reference [Add Content Reference Link](#)

*Menu Name

*Market

*Component

Page

Menu Action

Search Keys

URL Keys				Find	First	1-2 of 2	Last
Selection Flag	Field Name	Key Value	Field Lookup				
<input type="checkbox"/>	BUSINESS_UNIT	<input type="text"/>					<input type="button" value="+"/> <input type="button" value="-"/>
<input type="checkbox"/>	VOUCHER_ID	<input type="text"/>					<input type="button" value="+"/> <input type="button" value="-"/>

12. On the Select a Component page, **Click** . The URL Keys section will appear.

13. In the *Key Value* field, either **type** in the [table alias.field name](#) or **search** using the *Field Lookup*.

14. On the Select a Component page, **click** . The Map URL to Query Columns section will appear.

Select a Component

*Component

Page

Menu Action

URL Keys			
Selection Flag	Field Name	Key Value	Field Lookup
<input type="checkbox"/>	BUSINESS_UNIT	A.BUSINESS_UNIT	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="checkbox"/>	VOUCHER_ID	A.VOUCHER_ID	<input type="button" value="+"/> <input type="button" value="-"/>

Map URL to Query Columns	
Selection Flag	Unique Field Name
<input type="checkbox"/>	A.BUSINESS_UNIT
<input type="checkbox"/>	D.NAME1
<input type="checkbox"/>	A.ENTERED_DT
<input checked="" type="checkbox"/>	A.GROSS_AMT
<input type="checkbox"/>	A.INVOICE_ID
<input type="checkbox"/>	A.INVOICE_DT
<input type="checkbox"/>	A.OPRID
<input type="checkbox"/>	E.OPRDEFNDESC

15. **Click** the *Selection Flag* checkbox for the appropriate column on which you wish to place your drill.
16. **Click** . You will be taken back to the Edit Expression Properties page. You should now see the built expression in the *Expression Text* box.

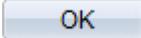
Edit Expression Properties

*Expression Type
 Drilling URL

Expression Text
 'psp//c/ENTER_VOUCHER_INFORMATION.VCHR_EXPRES
 S.GBL&BUSINESS_UNIT=%A.BUSINESS_UNIT%&VOUCHE
 R_ID=%A.VOUCHER_ID%:A.GROSS_AMT'

Query URL Component URL
 External URL Attachment URL
 Free Form URL Image URL
 REST URL

OK Cancel

17. Click 

18. Click 

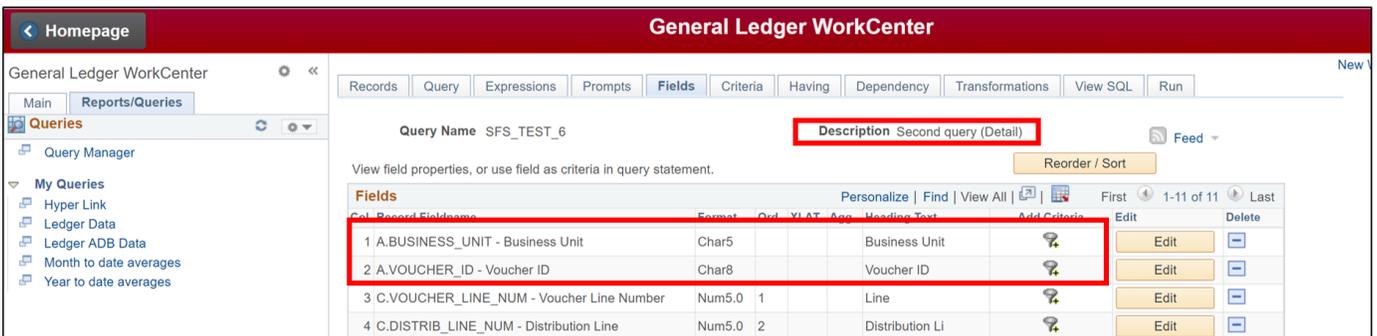
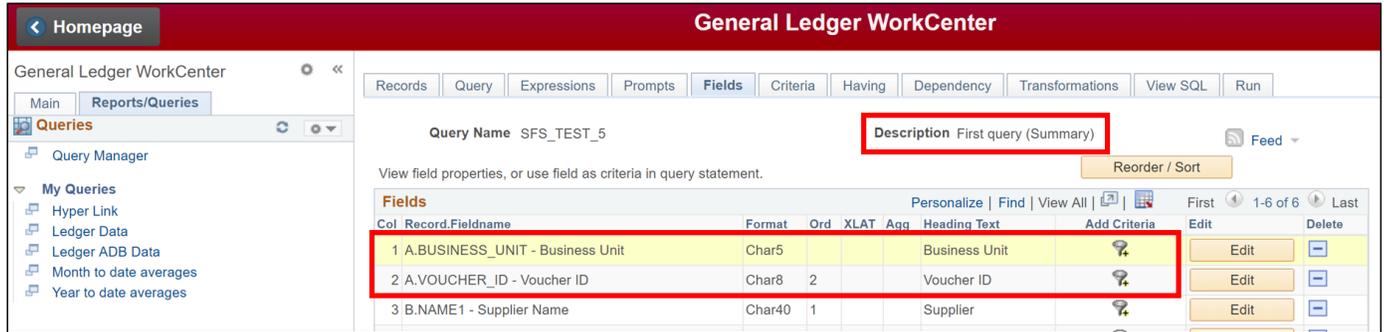
19. Test  the query to make sure the drill works correctly.

III. New Query Drill Functionality – Creating Drills to Other Queries in SFS

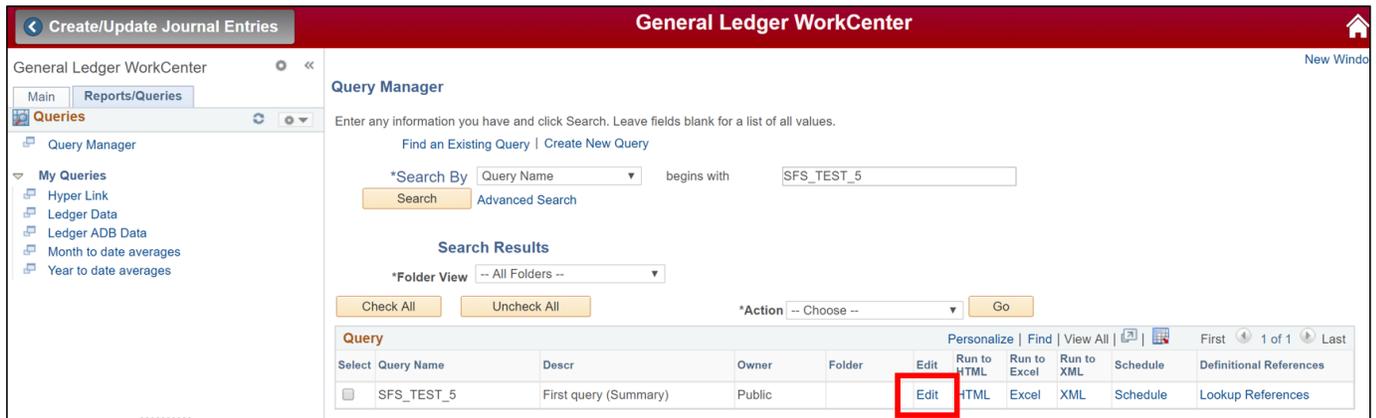
Create a drill from a PS Query to another PS Query.

Navigation: Main Menu > Reporting Tools > Query > Query Manager

1. It is important to note that you should plan your queries for the query-query link carefully before adding the drill functionality. In many cases, the first query will be a summary query and the second query will be a detail query. Both queries must contain any fields in which the parameter data is being passed from the first query to the next in the result set of each query. Either build or define the queries for the drill, then make sure they each contain the fields to be 'passed'.

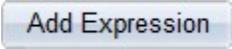


2. After identifying the queries you would like to join, click the *Edit* hyperlink on the first (summary) query.



3. Click Expressions



4. Click  . You will be taken to the Edit Expression Properties page.

5. In the *Expression Type* field, **choose** 'Drilling URL' from the drop down menu.
 6. Next, **click** the *Query URL* hyperlink. You will be taken to the Select a Query page:

Select a Query

Portal Name 🔍

Node Name 🔍 Use psc

Query Name 🔍

*Format ▼

7. **Search for** 🔍 or **type in** the name of the query to which you wish to drill in the *Query Name* field.
8. **Select** 'HTM' from the drop down menu in the *Format* field.
9. **Click** . The URL Keys section will appear.
10. In the *Key Value* field, either **type** in the [table alias.field name](#) or **search** 🔍 using the *Field Lookup*.

Select a Query

Portal Name

Node Name Use psc

Query Name

*Format

URL Keys					Find	First	1-2 of 2	Last
Selection Flag	Key Field Name	Unique Prompt Name	Key Value	Field Lookup				
<input type="checkbox"/>	BUSINESS_UNIT	BIND1	A.BUSINES	<input type="text"/>	<input type="button" value=""/>	<input type="button" value=""/>	<input type="button" value=""/>	<input type="button" value=""/>
<input type="checkbox"/>	VOUCHER_ID	BIND5	A.VOUCHER	<input type="text"/>	<input type="button" value=""/>	<input type="button" value=""/>	<input type="button" value=""/>	<input type="button" value=""/>

11. If you receive the “Query does not contain any prompt keys” error message, you may have to **click** the lookup  and **select** your query name, even though you have typed the query name in the box.

12. On the Select a Query page, **click** .

Select a Query

Portal Name

Node Name Use psc

Query Name

*Format

Prompt Keys Select Field **Map Columns**

URL Keys					
Selection Flag	Key Field Name	Unique Prompt Name	Key Value	Field Lookup	
<input type="checkbox"/>	BUSINESS_UNIT	BIND1	A.BUSINES		<input type="button" value="+"/> <input type="button" value="-"/>
<input type="checkbox"/>	VOUCHER_ID	BIND5	A.VOUCHER		<input type="button" value="+"/> <input type="button" value="-"/>

Map URL to Query Columns	
Selection Flag	Unique Field Name
<input type="checkbox"/>	A.BUSINESS_UNIT
<input checked="" type="checkbox"/>	A.VOUCHER_ID
<input type="checkbox"/>	B.NAME1
<input type="checkbox"/>	A.INVOICE_ID

- The Map URL to Query Columns section will appear. **Check** the box next to the column on which you would like to place your drill.
- Click . You will be taken back to the Edit Expression Properties page. You should be able to see your new expression in the *Expression Text* box.

Edit Expression Properties

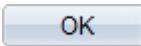
*Expression Type
 Drilling URL

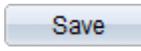
Expression Text

'psp//q/?
 ICAction=ICQryNameURL=PUBLIC.SFS_TEST_6&BIND1=%
 A.BUSINESS_UNIT%&BIND5=%A.VOUCHER_ID%:A.VOUC
 HER_ID'

Query URL Component URL
 External URL Attachment URL
 Free Form URL Image URL
 REST URL

OK Cancel

15. Click 

16. Click 

17. Test  the query to make sure the drill works correctly. Your query hyperlink should take you to the next query.

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Business Unit = UWMIL, User ID (%if unknown)=%, Entered on- From=2018-09-16, Entered on - To=2018-10-15

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

Business Unit	Voucher ID	Supplier	Invoice	Date	Gross Amt
1 UWMIL	01222650	AAA ACME LOCK CO INC	1801130295	10/01/2018	25.000
2 UWMIL	01222652	AAA ACME LOCK CO INC	00057689	09/29/2018	75.000

SFS_TEST_6- Second query (Detail)

Download results in : Excel Spreadsheet CSV Text File XML File (1 kb)

View All

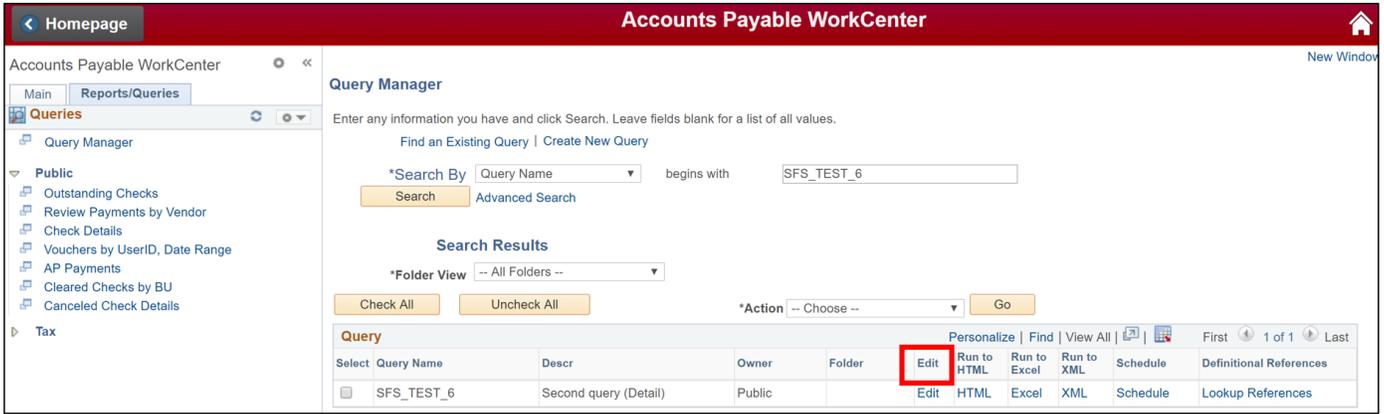
Business Unit	Voucher ID	Line	Distribution Li	GL Unit	Account	Fund	Class	Project	Dept	Amount
1 UWMIL	01222650	2		1 UWMIL	3120	128			032835	25.000

IV. New Query Drill Functionality – Creating Drills to External Websites

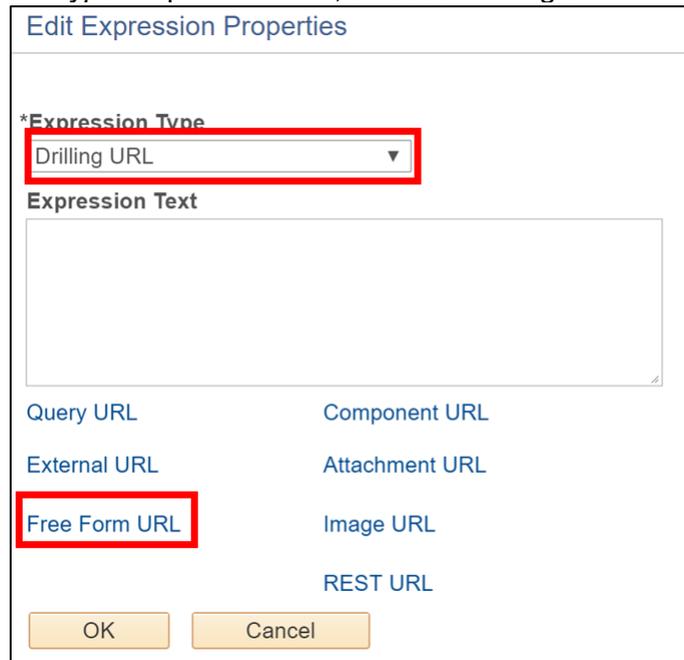
Create a drill from a query to an external website.

Navigation: Main Menu > Reporting Tools > Query > Query Manager

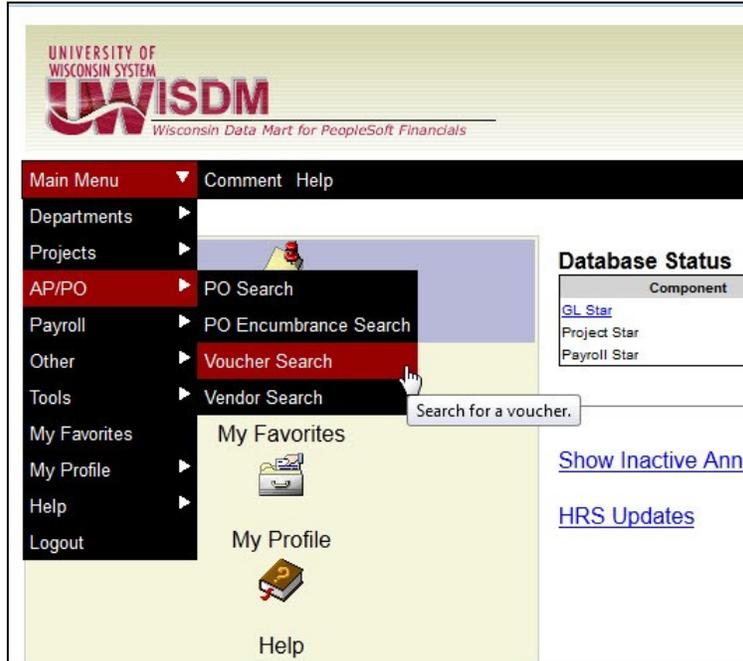
1. After you have identified the query to which you would like to add a drill, **click the *Edit* hyperlink in Query Manager.**



2. Click **Expressions**
3. Click **Add Expression**. You will be taken to the Edit Expression Properties page.
4. In the *Expression Type* dropdown menu, **choose 'Drilling URL'.**



5. **Click the *Free Form URL* hyperlink.** You will be taken to the Define a Free Form URL page.
6. In a new browser window, **navigate** to the external website.
7. If you are linking to WISDM, as in this example, **find** an example of the data to which you are drilling in your query. (i.e. PO Search for Purchase Orders, Project Search for Projects, etc.)



8. Once you have searched, **click** on the detail link.

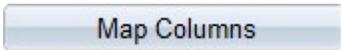


9. On the detail page, **select** and **copy** the URL from the browser's address bar.
10. **Paste** the URL address into the *URL* box on the Define a Free Form Drilling URL page.
11. **Edit** the text to replace the values after the "=" to be the values from your query you wish to pass. Use the [table alias.field name](#) method as mentioned in this training document. **Surround** the name with % symbols. (i.e. %A.PO_ID%)

Define a Free Form Drilling URL

URLID https://wisdm2.doit.wisc.edu/wisdm2/PoDetail.aspx?id=%A.PO_ID%

12. Click



13. Check the box next to the query column in which you wish to place your drill.

Map URL to Query Columns Find | First 1-11 of 11 Last

Selection Flag	Unique Field Name
<input type="checkbox"/>	A.BUSINESS_UNIT
<input checked="" type="checkbox"/>	A.VOUCHER_ID
<input type="checkbox"/>	C.VOUCHER_LINE_NUM
<input type="checkbox"/>	C.DISTRIB_LINE_NUM
<input type="checkbox"/>	C.BUSINESS_UNIT_GL
<input type="checkbox"/>	C.ACCOUNT
<input type="checkbox"/>	C.FUND_CODE
<input type="checkbox"/>	C.CLASS_FLD
<input type="checkbox"/>	C.PROJECT_ID
<input type="checkbox"/>	C.DEPTID
<input type="checkbox"/>	C.MONETARY_AMOUNT

14. Click



. You will be taken back to the Edit Expression Properties page, and you should see your newly created expression in the *Expression Text* box.

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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 SFS_TEST

Search Advanced Search

Search Results

*Folder View -- All Folders --

Check All Uncheck All *Action -- Choose -- Go

Query	Personalize	Find	View All	First	1-3 of 3	Last			
<input type="checkbox"/> SFS_TEST	Vouchers by UserID, date range	Public	SFS AP INVENTORY	Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/> SFS_TEST_5	First query (Summary)	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/> SFS_TEST_6	Second query (Detail)	Public		Edit	HTML	Excel	XML	Schedule	Lookup References

2. Click **Expressions**.
3. Click **Add Expression**. You will be taken to the Edit Expression Properties page:

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

Query Name SFS_TEST Description Vouchers by UserID, date range Feed

Add Expression

Expressions List

Expression Text	Use as Field	Add Criteria	Edit	Delete
'WISDM link'	Use as Field		Edit	

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

Return To Search

4. The *Expression Type* dropdown value should default to 'Character'. **Type** your expression text in the *Expression Text* box, surrounded by single quotes. **Set** the *Length* to the correct value to include all the characters for the expression text you entered. Include quotes as characters. ('Some'= 6; 'Characters' = 12)

Edit Expression Properties

*Expression Type

 Aggregate Function Length
 Decimals

Expression Text

Add Prompt Add Field

5. Click . You will be taken back to . You should see your new text in the Expressions List section.

Accounts Payable WorkCenter

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

Query Name SFS_TEST Description Vouchers by UserID, date range Feed

Add Expression

Expressions List

Expression Text	Use as Field	Add Criteria	Edit	Delete
'WISDM Link'	<input type="button" value="Use as Field"/>	<input type="button" value="Add Criteria"/>	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

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

Return To Search

6. Click the *Use as Field* hyperlink. You will be taken to and you will see your expression added as a field.

University of Wisconsin System SFS Business Process RPT.1.02.05- Advanced PeopleSoft Query: Creating Hyperlinked Query Drills

Accounts Payable WorkCenter

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

Query Name: SFS_TEST Description: Vouchers by UserID, date range

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

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.BUSINESS_UNIT - Business Unit	Char5				Business Unit		Edit	
2	A.VENDOR_ID - Supplier ID	Char10				Supplier		Edit	
3	D.NAME1 - Supplier Name	Char40				Vendor Name		Edit	
4	A.VOUCHER_ID - Voucher ID	Char8	1			Voucher ID		Edit	
5	A.ENTERED_DT - Entered on	Date				Voucher Entry Date		Edit	
6	A.GROSS_AMT - Gross Invoice Amount	SNm25.3				Gross Amt		Edit	
7	A.INVOICE_ID - Invoice Number	Char30				Invoice Number		Edit	
8	A.INVOICE_DT - Invoice Date	Date				Invoice Date		Edit	
9	A.OPRID - User ID	Char30				User ID		Edit	
10	E.OPRDEFNDESC - Description	Char30				User Name		Edit	
11	'WISDM Link'	Char15				'WISDM Link'		Edit	

Save Save As New Query Preferences Properties Publish as Feed Publish as Pivot Grid

7. Go back to **Expressions**.
8. Click **Add Expression**. You will be taken to the Edit Expression Properties page:

Accounts Payable WorkCenter

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

Query Name: SFS_TEST Description: Vouchers by UserID, date range

Add Expression

Expression Text	Use as Field	Add Criteria	Edit	Delete
'WISDM Link'	Use as Field		Edit	

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

Return To Search

9. In the *Expression Type* field, choose 'Drilling URL' from the drop down menu.

Edit Expression Properties

*Expression Type
Drilling URL

Expression Text

Query URL Component URL
External URL Attachment URL
Free Form URL Image URL
REST URL

OK Cancel

10. Next, **click** the *Free Form URL* hyperlink. You will be taken to the Define a Free Form Drilling URL page:

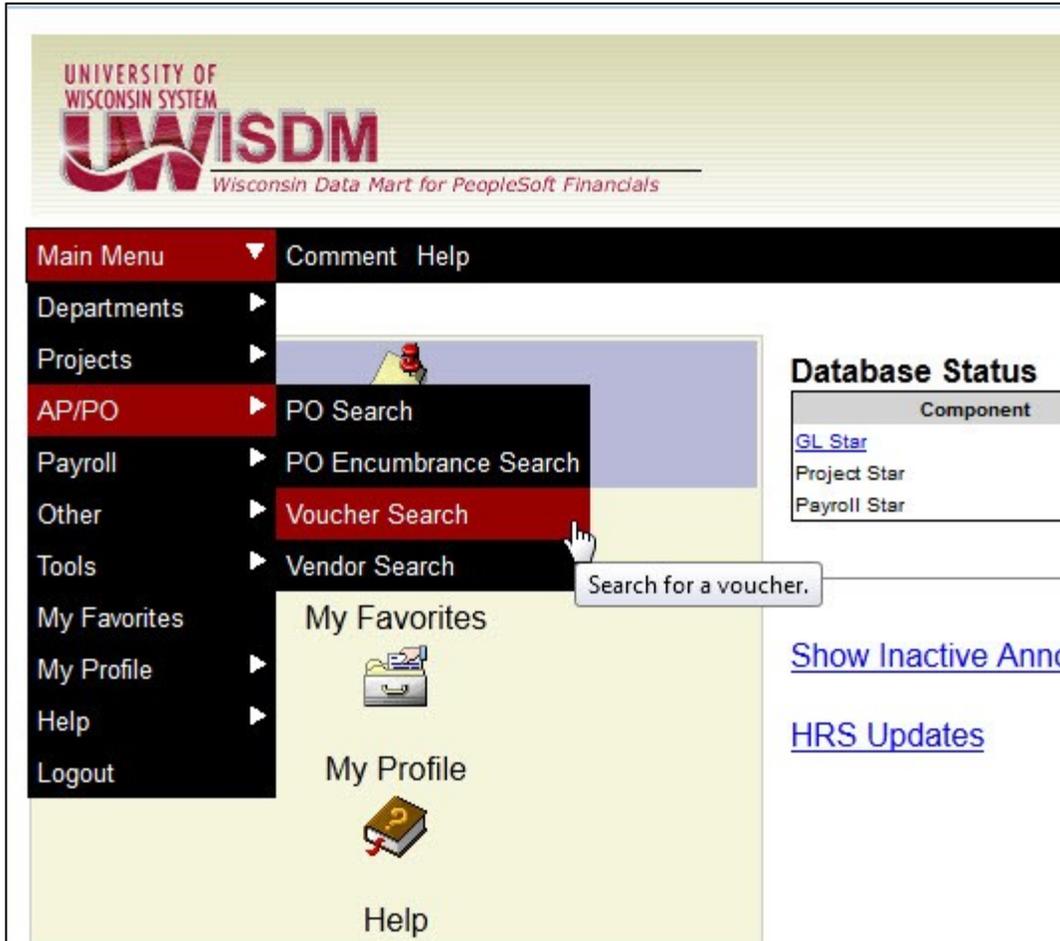
Define a Free Form Drilling URL

URLID

Map Columns

11. **Open** a new internet browser window.

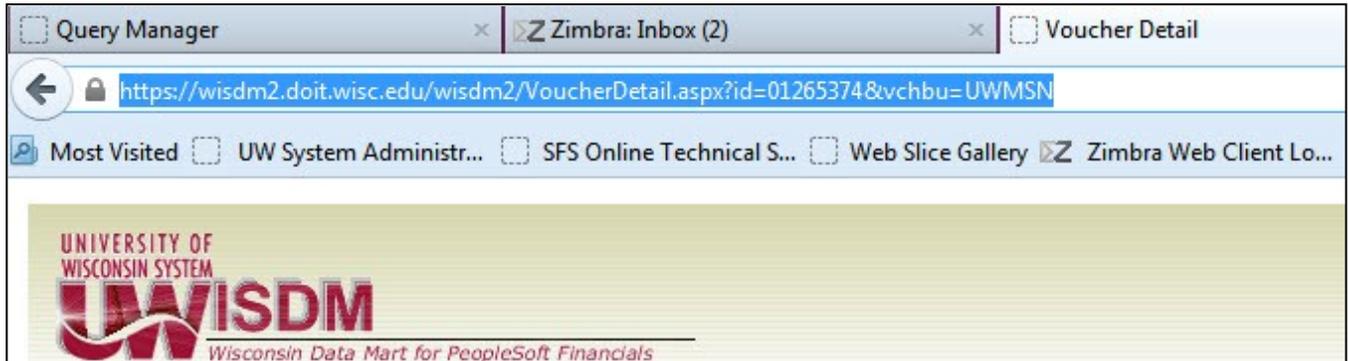
12. **Navigate** to the external website. (In this example, WISDM.)
13. **Log in**, if required.



14. **Search** for a value that matches the information you wish to pass through the query. (In this example, we want to pass Business Unit and Voucher ID#. So, for this example, we **navigate** to the "Voucher Search" page in WISDM. **Search** for any Voucher ID#.)
15. When you find a value that returns results, **click** the hyperlink to the detail page.

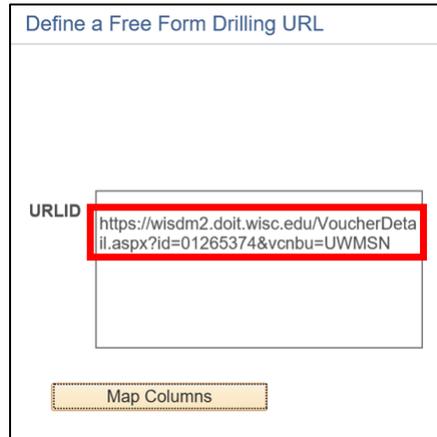
Voucher ID	Voucher Unit	Invoice No	Invoice Date	Vc
01285374	UWMSN	8950875	5/24/2011	0000109751

16. Once you are on the detail page, **copy** the URL from the address bar.

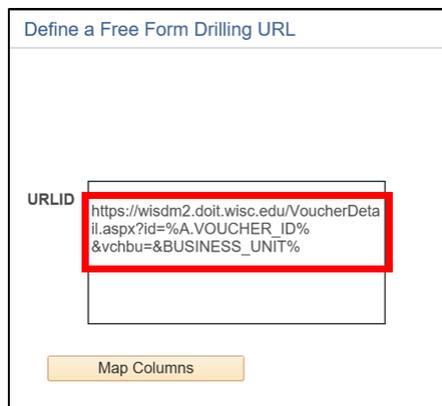


17. **Return** to the browser that contains your query.

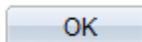
18. **Paste** website URL into the *URL* textbox.



19. **Edit** the text to replace the values after the “=” to be the values from your query you wish to pass. Use the [table alias.field name](#) method as mentioned in this training document. **Surround** the name with % symbols. (i.e. %A.VOUCHER_ID%)



20. Once you have finished, **click**



21. In this example, we want to pass the Business Unit and Voucher ID. If you do not

know them, the values can be found on **Query**. Make sure those fields are **checked**

Accounts Payable WorkCenter

Records | **Query** | Expressions | Prompts | Fields | Criteria | Having | Dependency | Transformations | View S

Query Name: SFS_TEST Description: Vouchers by UserID, date range

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	Hierarchy Join
A	VOUCHER - AP Voucher Header Table	Join

Check All Uncheck All

Fields Find | View 100 First 1-50 of 264 Last

<input checked="" type="checkbox"/>	BUSINESS_UNIT - Business Unit	
<input checked="" type="checkbox"/>	VOUCHER_ID - Voucher ID	
<input type="checkbox"/>	VOUCHER_STYLE - Voucher Style	

22. Click **Map Columns**. The Map URL to Query Columns section will appear.

Define a Free Form Drilling URL

URLID: `https://wisdm2.doit.wisc.edu/VoucherDetail.aspx?id=%A.VOUCHER_ID%&vchbu=&BUSINESS_UNIT%`

Map Columns

Define a Free Form Drilling URL

Map Columns

Selection Flag	Unique Field Name
<input type="checkbox"/>	A.BUSINESS_UNIT
<input type="checkbox"/>	A.VENDOR_ID
<input type="checkbox"/>	A.VOUCHER_ID
<input type="checkbox"/>	A.ENTERED_DT
<input type="checkbox"/>	A.GROSS_AMT
<input type="checkbox"/>	A.INVOICE_ID
<input type="checkbox"/>	A.INVOICE_DT
<input type="checkbox"/>	A.OPRID
<input checked="" type="checkbox"/>	EXPR11_11

OK Cancel

23. Click the *Selection Flag* checkbox for the appropriate column on which you wish to place your drill. You should see your newly created expression represented as “Expr#_#”.
24. Click . You will be taken back to the Edit Expression Properties page. You should now see the built expression in the *Expression Text* box.

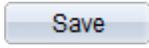
Edit Expression Properties

*Expression Type
 Drilling URL

Expression Text
 '/f/[https://wisdm2.doit.wisc.edu/VoucherDetail.aspx?id=%A.VOUCHER_ID%&vchbu=&BUSINESS_UNIT%]:EXPR11_11'

Query URL Component URL
 External URL Attachment URL
 Free Form URL Image URL
 REST URL

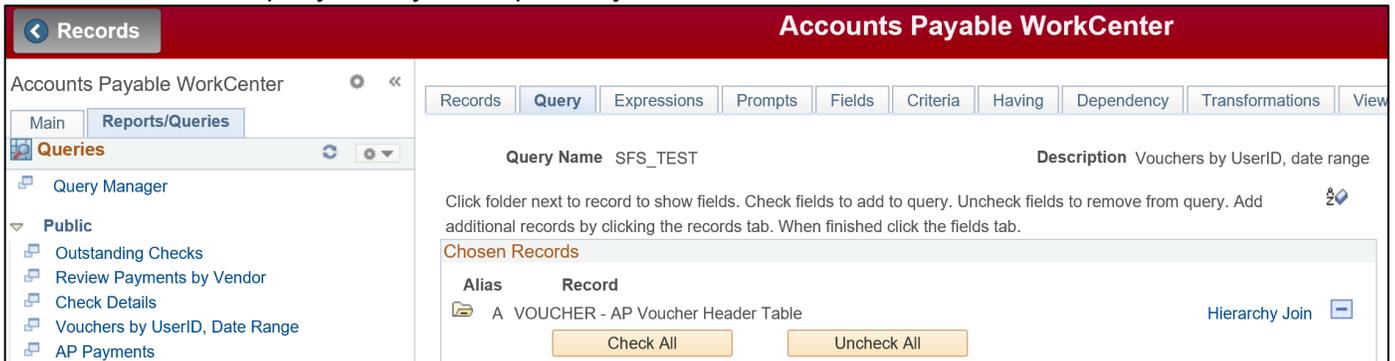
OK Cancel

- 25. Click . You will be taken back to .
- 26. Click .
- 27. Test  the query to make sure the drill works correctly.

VI. Troubleshooting Tips

Here are a few tips and things to consider when having difficulty creating queries with new drill functionality.

1. **Use** the 'Save As' function to save your query as a different name until you perfect the techniques described here. Don't forget to delete the old one when you get it all done!
2. **Save** often.
3. **Plan** your query carefully. **Know** what fields you are passing in the drills.
4. **Know** to what tables the fields belong that you are attempting to pass to another query, PeopleSoft page or external website.
5. **Table Alias.Field Name-** **Know** the table aliases ahead of time. Table alias information can be found on the  of your query. It is the letter of the alphabet that is shown just before the table name.
 - a. PS Query assigns each table added to a query an alias. If you have 4 tables in a query, then you will probably have aliases A, B, C and D.



The screenshot shows the 'Accounts Payable WorkCenter' interface. The 'Query' tab is selected, showing the configuration for a query named 'SFS_TEST'. The description is 'Vouchers by UserID, date range'. Below the description, there is a section for 'Chosen Records' with a table:

Alias	Record
A	VOUCHER - AP Voucher Header Table

Buttons for 'Check All' and 'Uncheck All' are visible below the table.

- b. Many input fields in PS Query hyperlinking drills will look for the table alias.fieldname. For example, the table alias.field name for the field VOUCHER_ID on the VOUCHER table shown below would be 'A.VOUCHER_ID'.

NOTE: In order for the query to pass the values correctly, all fields listed in the URL Keys section **MUST** be included (box checked) on , like below:

The screenshot shows the 'Accounts Payable WorkCenter' interface. The 'Query Name' is 'SFS_TEST' and the 'Description' is 'Vouchers by UserID, date range'. The 'Fields' list includes:

- BUSINESS_UNIT - Business Unit
- VOUCHER_ID - Voucher ID
- VOUCHER_STYLE - Voucher Style
- INVOICE_ID - Invoice Number
- ERS_INV_SEQ - ERS Invoice Sequence
- INVOICE_DT - Invoice Date
- VENDOR_SETID - Supplier SetID
- VENDOR_ID - Supplier ID

The 'Chosen Records' section shows 'A. VOUCHER - AP Voucher Header Table'.

- Any fields you are trying to pass in the drill MUST be included as fields (box checked) in the original query. If you don't see the fields returned in the original query, you can add them on [Query](#).
- Feel free to contact support for assistance. Email uwsaproblemsolvers@maillist.uwsa.edu.

Revision History

Author	Version	Date	Description of Change
Stacy VanWormer	1.0	07/11/13	Initial Draft
Susan Kincanon	1.1	07/22/2013	Review, edit, and format
Scott Larson	1.2	07/22/2013	Review and edit
Stacy VanWormer	1.3	07/22/2013	Final updates
Susan Kincanon	1.4	07/23/2013	Final review and publish
Bonnie Correll	2.0	10/17/2018	Revised for SFS 9.2