

# Contents

Busine	ess Process Overview	1
Proce	ss 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
Revisi	ion 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



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. Ru

the query as you would normally.

vorite	es Main M	enu > Rep	orting Too	ls > Quer	y > Query Ma	nager											
*	•		-			-											
lecor	ds Que	ry Expre	ssions	Prompts	Fields	Criteria H:	aving	View SQI		Run							
Bus	iness Un	it = UWEX	T,Contra	act # (%	if Unknown)	=%,Project	(% for /	All or U	nkno	wn)=133	3%						
view All   Rerun Query   Download to Excel   Download to XML																	
1010										CL							
	Business Unit	Contract Number	Contract Line	Project	Contract Type	Contract Status	Account	Dept	Fund	Program	Analysis Type	Acctg Date	Resource Amount	Dist. Status	Dist. Status	Invoice	Bill Date
1	UWEXT	EXT100006	1	<u>133KG43</u>	SCHEDULED	PRE_CLOSE	2620	464620	133	5	BIL	10/10/2008	107696.740	Р	С		
2	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	2620	464620	133	5	BIL	10/14/2008	108518.850	Р	С		
3	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	2184	464600	133	5	BIL	11/18/2008	895.000	Ρ	С		
4	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	3710	464610	133	5	BIL	11/20/2008	429.000	Ρ	С		
5	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	2130	464630	133	5	BIL	11/21/2008	372.200	P	С		
6	UWEXT	EXT100006	1	<u>133KG43</u>	SCHEDULED	PRE_CLOSE	2620	464610	133	5	BIL	11/26/2008	90.000	Ρ	С		
7	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	2260	464610	133	5	BIL	12/02/2008	900.000	Ρ	С		
8	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	2620	464610	133	5	BIL	12/03/2008	100.000	P	С		
9	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	2620	464610	133	5	BIL	12/03/2008	1725.000	Ρ	С		
10	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	2130	464610	133	5	BIL	12/04/2008	447.080	Ρ	С		
11	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	1771	464610	133	5	BIL	12/04/2008	2340.970	Ρ	С		01/01/1900
12	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	1771	464630	133	5	BIL	12/04/2008	213.950	Ρ	С		01/01/1900
13	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	2130	464630	133	5	BIL	12/05/2008	699.390	Ρ	С		
14	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	3710	464610	133	5	BIL	12/05/2008	322.960	Р	С		
15	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	1076	464630	133	5	BIL	12/05/2008	335.000	Р	С		01/01/1900
16	UWEXT	EXT100006	1	133KG43	SCHEDULED	PRE_CLOSE	1076	464610	133	5	BIL	12/05/2008	650.000	P	С		01/01/1900

3. Click the hyperlinked field to drill.



Shared Financial System					
Favorites Main Menu > Ci	ustomer Contracts > Creat	e and Amend >	General Information		
General Lines Ame	ndments				
Contract Number:	EXT100006		Sold To Customer:	CORPORATION FOR PUBLIC BROADCA	STING
Amendment Number:	000000003		*Contract Status:	PRE_CLOSE	
Amend Contract			Add to My Contracts		
Description:	FY08 WHA-TV COMMUNI	TY SERVICE	Processing Status:	Active	
Contract Admin:		<b>Q</b>	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	
			Last Update User ID:	00550769	
Other Information					
Summary of Amounts					
Go To: <u>Billing Plans</u>	Revenue Plans	<u>Milestones</u>	Renewals	More	•
Save Return to Sea	rch 🔚 Notify			🖡 Add 🖉 Upda	ate/Display
General   Lines   Amendment	<u>s</u>				

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.



K Homepage	General Ledger WorkCenter	
General Ledger WorkCenter • • • • • • • • • • • • • • • • • • •	Query Manager         Enter any information you have and click Search. Leave fields blank for a list of all values.         Eind an Existing Query         Create New Query	
<ul> <li>My Queries</li> <li>Hyper Link</li> <li>Ledger Data</li> <li>Ledger ADB Data</li> <li>Month to date averages</li> <li>Year to date averages</li> </ul>	*Search By Query Name   begins with SFS_TEST  Search Results  *Folder View All Folders	
	Check All *Action Choose •	G
	Query     Person       Select Query Name     Descr     Owner     Folder     Edit     Ru	onalize un to
	SFS_TEST Vouchers by UserID, date range Public SFS AP	TML
Homepage General Ledger WorkCenter	<ul> <li>Records Query Expressions Prompts Fields Cr</li> </ul>	
Main Reports/Queries		
<ul> <li>Query Manager</li> <li>My Queries</li> <li>Hyper Link</li> <li>Ledger Data</li> <li>Ledger ADB Data</li> <li>Month to date averages</li> <li>Year to date averages</li> </ul>	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 Pro	operties
*Expression Type	T
Expression Text	
Query URL	Component URL
External URL	Attachment URL
Free Form URL	Image URL
	REST URL
OKC	ancel

- 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		0	
Node Name		Q	Use psc
Content Reference			Add Content Reference Link
*Menu Name		Q	
*Market			
*Component		2	
Page		Q	
Menu Action	▼		
Search Keys	Select Field	Map Colu	mns

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 主 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.



	Portal Name		Q		
	Node Name			lsensc	
Con	tent Reference FP_VCHR	EXPRESS GBI			
001	*Menu Name ENTER V	OUCHER INFORMATION	Add	Content Reference	ce Link
	*Market GBL				
		DDESS			
		PRESS			
	Page		Q		
Search Ke	eys Sele	ct Field Ma	o Columns		
Search Ke	eys Sele	ct Field Ma	Columns	First 🕙 1-2 c	of 2 🕑 Las
Search Ke URL Keys Selection Flag	eys Sele	ct Field Ma	o Columns ind   고	First 4 1-2 c	of 2 🕑 Las
Search Ke URL Keys Selection Flag	Sele	ct Field Ma	o Columns	First ④ 1-2 c Field Looku	of 2 🕑 Las
Search Ke URL Keys Selection Flag	eys Sele Field Name BUSINESS_UNIT VOUCHER_ID	ct Field Ma	o Columns	First 1-2 c Field Looku	of 2 🕑 Las ip

- *13.* In the *Key Value* field, either **type** in the <u>table alias.field name</u> or **search** susing the *Field Lookup*.
- 14. On the Select a Component page, **click** Map Columns . The Map URL to Query Columns section will appear.



Select a Compo	onent		
Search Ke	*Component VCHR_EXPF Page Menu Action eys Select	RESS	]
URL Keys		Find   🗐 Fir	rst 🕚 1-2 of 2 🕑 Last
Selection Flag	Field Name	Key Value	Field Lookup
	BUSINESS_UNIT	A.BUSINESS_UNIT	۹ 🛨 🖃
	VOUCHER_ID	A.VOUCHER_ID	Q = =
Map URL to Qu Selection Flag	Initial Stress     Find       Unique Field Name     A.BUSINESS_UNIT       D.NAME1     A.ENTERED_DT       A.GROSS_AMT     A.INVOICE_ID	d   🔄 First 🕢 1-8 of 8 🕑 Last	
	A.INVOICE_DT		
	A.OPRID		
	E.OPRDEFNDESC		
ОК	Cancel		

- 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.



17.

18.

19.

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

Expression Text	
'psp///c/ENTER_V S.GBL&BUSINES R_ID=%A.VOUCH	OUCHER_INFORMATION.VCHR_EXPRES S_UNIT=%A.BUSINESS_UNIT%&VOUCHE IER_ID%:A.GROSS_AMT'
Query URL	Component URL
External URL	Attachment URL
Free Form URL	Image URL
	REST URL
OK	Cancel

#### 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*

 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'.



Komepage		Ge	neral Ledg	jer Wor	rkCenter			
General Ledger WorkCenter	• «	Records Query Expressions Prompts Fie	lds Criteria	Having	Dependency Trans	formations View	SQL Run	
Queries	0 •	Query Name SFS_TEST_5		Desc	ription First query (Sun	ery (Summary)		~
Query Manager     My Queries		View field properties, or use field as criteria in query state	ent.			Reorder / S	Sort	
🗗 Hyper Link		Fields			Personalize   Find   Vie	ew All   💷   🔜	First 🕙 1-6 of 6	6 🕑 Last
<ul> <li>Ledger Data</li> <li>Ledger ADB Data</li> </ul>		Col         Record.Fieldname           1         A.BUSINESS_UNIT - Business Unit	Char5	XLAT Agg	Business Unit	Add Criteria	Edit	Delete
Month to date averages		2 A.VOUCHER_ID - Voucher ID	Char8 2		Voucher ID	9,	Edit	-
Teal to date averages		3 B.NAME1 - Supplier Name	Char40 1		Supplier	9,	Edit	-
						-		

			dger WorkCenter							
General Ledger WorkCenter	o «	Records Query Expressions	Prompts Field	Is Criter	a Having	g Dependency Trans	sformations View S	SQL Run		New \
Queries Query Manager	0 •	Query Name SFS_TEST_6	s criteria in query state	nent.		Description Second query (	Detail) Reorder / S	Feed -		
<ul> <li>➢ My Queries</li> <li>☑ Hyper Link</li> <li>☑ Ledger Data</li> </ul>		Fields		Format	Ord XLAT	Personalize   Find   View	V All   🖾   🔜 F	rst ④ 1-11 of 11 Edit	Last     Delete	
<ul> <li>Ledger ADB Data</li> <li>Month to date averages</li> </ul>		1 A.BUSINESS_UNIT - Business 2 A.VOUCHER_ID - Voucher ID	Jnit	Char5 Char8		Business Unit Voucher ID	9. 9.	Edit Edit		
Year to date averages		3 C.VOUCHER_LINE_NUM - Vou- 4 C.DISTRIB_LINE_NUM - Distrib	cher Line Number ution Line	Num5.0 Num5.0	1	Line Distribution Li	94 94	Edit Edit		

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

Create/Update Journal Entries	Genera	I Ledger WorkCenter	<b>^</b>
General Ledger WorkCenter     O     Image: Content of the second	Query Manager Enter any information you have and click Search. Leave fields blau Find an Existing Query I Create New Query *Search By Query Name • begins Search Advanced Search Search Results *Folder View - All Folders • •	*Action - Choose - •	New Windo
	Query	Personalize   Find	View All   💷   🔜 First 🕚 1 of 1 🕑 Last
	Select Query Name Descr	Owner Folder Edit Run to HTML Excel	Run to XML Schedule Definitional References
	SFS_TEST_5 First query (Summary)	Public Edit HTML Excel	XML Schedule Lookup References

3. Click Expressions



Create/Update Journal En	tries			Genera	al Ledger W	orkCenter			
General Ledger WorkCenter		¢ «	Records Query Expressions	Prompts Fields	Criteria Having	Dependency	Transformations	View SQL	Run
Queries Query Manager	0	0 -	Query Name SFS_TEST_5		De	scription First que	ry (Summary)		Feed 👻
✓ My Queries I Hyper Link I edger Data			Save Save As New Quer	y Preferences	Properties	Publish as Feed	Publish as Pive	ot Grid	New Union
Ledger ADB Data     Month to date averages     Year to date averages			Return To Search						

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

Edit Expression Properties					
*Expression Typ	e				
Drilling URL	▼				
Expression Tex	t				
	h				
Query URL	Component URL				
External LIRI	Attachment LIRI				
	Allachment one				
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 *Query URL* hyperlink. You will be taken to the Select a Query page:



Select a Query	
Portal Name	٩
Node Name	🔍 🔲 Use psc
Query Name SFS_TEST_6	٩
*Format HTM ▼	
Prompt Keys Select Field	Map Columns

- 7. Search for <sup>Q</sup> 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 Prompt Keys . The URL Keys section will appear.
- 10. In the Key Value field, either **type** in the <u>table alias.field name</u> or **search** susing the *Field Lookup*.



Select a Query				
Portal Nam	ne		Q	
Node Nam	ne		Q	Use psc
Query Nam	e SFS_TEST_6		Q	
*Form	at HTM 🔻			
Prompt Ke	eys	Select Field		Map Columns
			9	0
URL Keys		Find	First	t 🕚 1-2 of 2 🕑 Last
Selection Flag	Key Field Name	Prompt Name	Key Value	Field Lookup
	BUSINESS_UNI	BIND1	A.BUSINES	Q = =
	VOUCHER_ID	BIND5	A.VOUCHER	٩ + -
OK	Cancel			

- 11. If you receive the "Query does not contain any prompt keys" error message, you may have to **click** the lookup <sup>(4)</sup> and **select** your query name, even though you have typed the query name in the box.
- 12. On the Select a Query page, **click**

Map Columns	
-------------	--



Select a Query							
Portal Name				Q			
Node Name		🔍 🔲 Use psc					
Query Name	SFS_	TEST_6		Q			
*Format	HTM	•					
Prompt Key	S		Select Field		Map Columr	าร	
URL Keys Selection Flag	Key	Field Name	Find   Unique Prompt Name	First Key Value	<ul><li>I-2 of 2</li><li>Field Lookup</li></ul>	€ Last	
	BUS	SINESS_UNIT	BIND1	A.BUSINES	Q	+ -	
	VOL	JCHER_ID	BIND5	A.VOUCHE	Q	+ -	
Map URL to Qu	erv C	olumns	Find L	First G	1-6 of 6 🕟	Last	
Selection Flag		Unique Field N	Name	11150		LUST	
		A.BUSINESS	_UNIT				
		A.VOUCHER_ID					
		B.NAME1					
		A.INVOICE_I	D				

- 13. 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.
- 14. **Click** OK . 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.



*Expression Type	
Drilling URL	▼
Expression Text	
A.BUSINESS_UNIT%{	&BIND5=%A.VOUCHER_ID%:A.VOU
Query URL	Component URL
Query URL External URL	Component URL Attachment URL
Query URL External URL Free Form URL	Component URL Attachment URL Image URL

- 15. Click OK 16. Click Save
- 17. Test Run the query to make sure the drill works correctly. Your query hyperlink should take you to the next query.

Create/Update Journal Entries				General Ledger	WorkCenter		
General Ledger WorkCenter	«	Records Query I	Expressions	Prompts Fields Criteria Ha	ving Dependency Transformati	ons View SQL	Run
Main Reports/Queries	~	Business Unit = U	WMIL,User ID	) (%if unknown)=%,Entered o	n- From=2018-09-16,Entered	on - To=2018-10-	15
P Query Manager		View All   Rerun Query   Download to Excel   Download to XML First 🕢 1-9 of 9 🕟 La					
		Business Unit	Voucher ID	Supplier	Invoice	Date	Gross Amt
P Hyper Link		1 UWMIL	01222650	AAA ACME LOCK CO INC	1801130295	10/01/2018	25.000
🚽 Ledger Data		2 UWMIL	01222652	AAA ACME LOCK CO INC	00057689	09/29/2018	75.000

											Â
SF	S_TEST_6- Second query (I	Detail)								_	
Do	ownload results in : Excel SpreadS	Sheet CSV Text File XMI	File (1 kb)								
Vie	w All										First 1-1 of 1 Last
	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.

Homepage	Accounts Payable WorkCenter	Â
Accounts Payable WorkCenter  Main Reports/Queries Queries Query Manager	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	New Windov
<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> </ul>	*Search By Query Name v begins with SFS_TEST_6 Search Advanced Search Search Results *Folder View All Folders v Check All Uncheck All *Action Choose v Go	
▶ Tax	Query Personalize   Find   View All   🖾	First 🕚 1 of 1 🕑 Last
	Select Query Name Descr Owner Folder Edit Run to Run to XML Schedule	Definitional References
	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.
- 4. In the *Expression Type* dropdown menu, **choose** 'Drilling URL'.

Edit Expression	Properties
*Everageige Type	
Drilling URL	▼
Expression Text	
Query URL	Component URL
External URL	Attachment URL
Free Form URL	Image URL
	REST URL
ОК	Cancel

- 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.
- 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.)



UNIVERSITY OF WISCONSIN SYSTEM	ISDM Wisconsin Data Mart for PeopleSoft Financials	
Main Menu	Comment Help	
Departments	•	
Projects	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Database Status
AP/PO	PO Search	Component
Payroll	PO Encumbrance Search	GL Star Project Star
Other	Voucher Search	Payroll Star
Tools	Vendor Search	a voucher
My Favorites	My Favorites	avouenen
My Profile		Show Inactive Anno
Help		HRS Undates
Logout	My Profile	Into opdatos
	Help	

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

UNIVERSITY OF WISCONSIN SYSTEM WISCONSIN Data Mart for Wain Menu Comment	PeopleSoft Financials						
				SEARCH CRITERIA			
				PO	starts with 👻	%00000%	
				PO Date	is exactly 💌		
				PO Vndr ID			
				PO Vndr Name	is exactly 👻		
				PO Short Vendor Name	is exactly 👻		
				Records Per Page		50 👻	
					Submit		Reset Search
First Page   Previous Page   1   2							
PO	PO Date	PO Vndr ID				PO	Vndr Name
126K000001	7/14/2009	0000123011	REGENTS	OF THE UNIVERSITY OF MINNESOTA			
203K000001	7/22/2010	0000131009					
209K000002	7/4/2011	0000136030					
<u>315K000001</u>	6/20/2011	0000005015	GI OFFICE TECHNOLOGIES				

- 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.
- Edit the text to replace the values after the "=" to be the values from your query you wish to pass. Use the <u>table alias.field name</u> method as mentioned in this training document. Surround the name with % symbols. (i.e. %A.PO\_ID%)



12. Click

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

Define	a Free Form Drilling URL
URLID	https://wisdm2.doit.wisc.edu/wisdm2/PoD etail.aspx?id=%A.PO_ID%
	Map Columns

Map Columns

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

Map URL to Query	Columns Find   E First V 1-11 of 11 V Last
Selection Flag	Unique Field Name
	A.BUSINESS_UNIT
	A.VOUCHER_ID
	C.VOUCHER_LINE_NUM
	C.DISTRIB_LINE_NUM
	C.BUSINESS_UNIT_GL
	C.ACCOUNT
	C.FUND_CODE
	C.CLASS_FLD
	C.PROJECT_ID
	C.DEPTID
	C.MONETARY_AMOUNT
OK	Cancel

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.



Check Details

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

	Edit Expression P	roperties				
	*Expression Type Drilling URL Expression Text '/f/[https://wisdm2.doit id=%A.PO_ID%]:A.V0	wisc.edu/wis DUCHER_ID'	▼ dm2/PoDetail.a	ispx?		
	Query URL External URL	Comp	onent URL	4		
	Free Form URL	Image	URL			
	ОК	REST Cancel	URL			
15. <b>Click</b> ок new expressior	. You will be tak	en back to	Expressio	ns , where	you should see your	
<b>16. Click</b> Save 17. Test Run th take you to the	e query to make s external webpage	ure the dril	l works cor	rectly. Your o	query hyperlink should	
Records				Acco	ounts Payable WorkCenter	
Accounts Payable WorkCenter • « Main Reports/Queries	Records Query Expressions	Prompts Fields	Criteria Having	Dependency Trans	sformations View SQL Run	
Queries Query Manager Query Manager Vellic Outstanding Checks Review Permente by Vender	Business Unit         UWMSN,Volume           View All   Rerun Query   Download         Business Unit         Vouch           1         UWMSN         0266647           2         UWMSN         0206647	to Excel   Download to er ID Line Distri	XML bution Li GL Unit 1 UWMSN	Account Fund Cla 3104 136	First      1-100 of 254502     Last     Bept     Amount     878200     505.560     408600     1021	

#### V. How to Create an Expression to use as a Drill Field

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Sometimes you may want to create a hyperlink from a query to another query, PeopleSoft page, or external website, but you don't have a natural column to place the hyperlink. An example of this might be hyperlinking to WISDM. There is a way using PS Query to create a new column using an expression, name that column, and add your Query Drill to that newly created column. In this example, the drill is to an external website.

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

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

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Criteria							Acco	ounts	Paya	able W	/orkCen	ter
Accounts Payable WorkCenter Main Reports/Queries Query Manager Public Cutstanding Checks Review Payments by Vendor Check Details Vouchers by UserID, Date Range AP Payments Cleared Checks by BU Canceled Check Details	0 «	Query Enter a	Manager  Any information you have and     Find an Existing Query       *Search By Query Nar     Search Advanced      Search Result      *Folder View - All Folder heck All Uncheck	click Search. Leave fields blank for Create New Query ne v begins with Search IS rrs – v All	a list of all value <u>FFS_T</u> *Action <u>- Chc</u>	85. EST 2058		S Go	×			
▶ Tax		Que	ry				Per	rsonalize	Find	View All	2   🔣	First 🕚 1-3 of 3 🕑 Last
		Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References
			SFS_TEST	Vouchers by UserID, date range	Public	SFS AP INVENTORY	Edit	ITML	Excel	XML	Schedule	Lookup References
			SFS_TEST_5	First query (Summary)	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
			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:

Records		Accounts Payable WorkCenter
Accounts Payable WorkCenter     Main   Reports/Queries     Queries   Query Manager	> 0 • • •	Records       Query       Expressions       Prompts       Fields       Criteria       Having       Dependency       Transformations       View SQL       Run         Query Name       SFS_TEST       Description       Vouchers by UserID, date range       SFeed        Feed          Add Expression       Feed        Feed        Feed        Feed        Feed
<ul> <li>Public</li> <li>Outstanding Checks</li> <li>Review Payments by Vendor</li> <li>Check Details</li> </ul>		Expressions List     Personalize     Find     Find     Find     Find     Find     Find     Expression       Expression Text     Use as Field     Add Criteria     Edit     Delete       'WISDM link'     Use as Field     %     Edit     Edit
<ul> <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>		Save         Save As         New Query         Preferences         Properties         Publish as Feed         Publish as Pivot Grid         New Union           Return To Search         Return

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)



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

Edit	Expression Properties
*Exp Cha Exp 'WI Add	ression Type aracter  aracter  aracter  aracter  aracter  aracter  aracter  becimals  becimals
5. Click OK in the Expres	. You will be taken back to Expressions . You should see your new text sions List section.
Records	Accounts Payable WorkCenter
Accounts Payable WorkCenter	Records Query Expressions Prompts Fields Criteria Having Dependency Transformations View SQL Run
Queries C o	Query Name     SFS_TEST     Description     Vouchers by UserID, date range       Add Expression
<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> </ul>	Expressions List       Personalize   Find   [7]   III       First ④ 1 of 1 ⑥ Last         Expression Text       Use as Field       Add Criteria       Edit       Delete         WISDM Link'       Use as Field       %       Edit       Delete         Save       Save As       New Query       Preferences       Properties       Publish as Feed       Publish as Pivot Grid       New Union
D Tax	Return To Search

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



Records			Accounts F	ayak	ole W	orkC	enter															
Accounts Payable WorkCenter	o «	Records Query Expressions Prom	pts Fields C	iteria	Having	J Dep	endency Transf	ormations View	v SQL Run	New												
Queries Query Manager	0 -	Query Name SFS_TEST View field properties, or use field as criteria in	n query statement.		ſ	Descripti	on Vouchers by Us	erID, date range Reorder	Sort Feed	Ŧ												
Public     Outstanding Checks		Fields				Person	alize   Find   View	Ali   🖾   🔣	First ④ 1-11 of 1	1 🕑 Last												
Review Payments by Vendor		Col Record.Fieldname	Forma	t Ord	XLAT	Agg He	eading Text	Add Criteria	Edit	Delete												
Check Details		1 A.BUSINESS_UNIT - Business Unit	Char			Bu	usiness Unit	9	Edit	-												
Vouchers by UserID, Date Range     AP Payments					2 A.VENDOR_ID - Supplier ID	Char	0		Su	upplier	94	Edit	-									
Cleared Checks by BU							3 D.NAME1 - Supplier Name	Char	0		Ve	endor Name	9.	Edit	-							
Canceled Check Details		4 A.VOUCHER_ID - Voucher ID	Char	1		Vo	oucher ID	9	Edit													
▶ Tax														5 A.ENTERED_DT - Entered on	Date			Vo	oucher Entry Date	9	Edit	-
		6 A.GROSS_AMT - Gross Invoice Amount	SNm	5.3		Gi	ross Amt	94	Edit	-												
		7 A.INVOICE_ID - Invoice Number	Char	0		In	voice Number	9	Edit	-												
Reports/Processes	0 •	8 A.INVOICE_DT - Invoice Date	Date			In	voice Date	9	Edit	-												
	Reports to Run	9 A.OPRID - User ID	Char	0		Us	ser ID	9	Edit	-												
Trial Register	10 E.OPRDEFNDESC - Description	Char	0		Us	ser Name	9	Edit	-													
Voucher Activity		11 'WISDM Link'	Char	5		'W	/ISDM Link'	9	Edit	-												
Processing Tools     Process Monitor     Report Manager		Save Save As New Query	Preferences	Propert	ies	Publis	sh as Feed	Publish as Pivot G	rid	Ne												

Go back to Expressions
 Click Add Expression . Yes

I. You will be taken to the Edit Expression Properties page:

Records		Accounts Payable Wo	rkCenter
Accounts Payable WorkCenter          Main       Reports/Queries         Image: Constraint of the second se	> 0 • • •	Records     Query     Expressions     Prompts     Fields     Criteria     Having       Query Name     SFS     TEST     Dest       Add Expression     Comparison     Comparison     Comparison	Dependency Transformations View SQL Run scription Vouchers by UserID, date range Feed
<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>		Expression List Expression Text WISDM Link' Save Save As New Query Preferences Properties Return To Search	Personalize       Find       Image: First fill in the last       1 of 1 fill in the last         Use as Field       Add Criteria       Edit       Delete         Use as Field       R       Edit       Edit         Publish as Feed       Publish as Pivot Grid       New Union

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



*Expression Type Drilling URL Expression Text Query URL Component URL External URL Attachment URL Free Form URL Image URL REST URL	Edit Expression Properties			
*Expression Type Drilling URL Expression Text Query URL Component URL External URL Attachment URL Free Form URL Image URL REST URL				
Expression Text         Query URL         Component URL         External URL         Attachment URL         Free Form URL         Image URL         REST URL	*Expression Type			
Query URL     Component URL       External URL     Attachment URL       Free Form URL     Image URL       REST URL	Expression Text			
Query URL     Component URL       External URL     Attachment URL       Free Form URL     Image URL       REST URL				
Query URL     Component URL       External URL     Attachment URL       Free Form URL     Image URL       REST URL				
Query URL     Component URL       External URL     Attachment URL       Free Form URL     Image URL       REST URL				
Query URL     Component URL       External URL     Attachment URL       Free Form URL     Image URL       REST URL				
External URL Attachment URL Free Form URL Image URL REST URL	Query URL	Component URL		
Free Form URL Image URL REST URL	External URL	Attachment URL		
REST URL	Free Form URL	Image URL		
		REST URL		
OK Cancel	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.

UNIVERSITY OF WISCONSIN SYSTEM	ISDM Wisconsin Data Mart for PeopleSoft Financials	-
Main Menu	Comment Help	
Departments	►	
Projects	► <u>/</u> ♣,	Database Status
AP/PO	PO Search	Component
Payroll	PO Encumbrance Search	GL Star Project Star
Other	Voucher Search Indiana	Payroll Star
Tools	Vendor Search	avoucher
My Favorites	My Favorites	a voucher.
My Profile		Show Inactive Anno
Help		HRS Undates
Logout	My Profile	Titto opuates
	Help	

- 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 natures around a value that natures are natures around a value that natures are natures around a value that natures around a value that natures are natures ar
- 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
01265374	UWMSN	8950875	5/24/2011	0000109751

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



Query Manager	× Zimbra: Inbox (2)	× [ Voucher Detail				
+ https://wisdm2.doit.wis	c.edu/wisdm2/VoucherDetail.aspx?id=01265374	l&vchbu=UWMSN				
Most Visited 🗍 UW System	Administr 🗍 SFS Online Technical S 🗍 V	Neb Slice Gallery <b>∑Z</b> Zimbra Web Client Lo				
UNIVERSITY OF WISCONSIN SYSTEM						
A A ISDM						
Wisconsin Data	Wisconsin Data Mart for PeopleSoft Financials					

- 17. **Return** to the browser that contains your query.
- 18. **Paste** website URL into the URL textbox.

Define a Free Form Drilling URL		
URLID	https://wisdm2.doit.wisc.edu/VoucherDeta il.aspx?id=01265374&vcnbu=UWMSN	
	Map Columns	

19. Edit the text to replace the values after the "=" to be the values from your query you wish to pass. Use the <u>table alias.field name</u> method as mentioned in this training document. **Surround** the name with % symbols. (i.e. %A.VOUCHER\_ID%)

Define a Free Form Drilling URL			
URLID	https://wisdm2.doit.wisc.edu/VoucherDeta il.aspx?id=%A.VOUCHER_ID% &vchbu=&BUSINESS_UNIT%		
	Map Columns		

- 20. Once you have finished, click
- 21. In this example, we want to pass the Business Unit and Voucher ID. If you do not

OK



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

checked



22. Click	Мар	Columns	. The Map URL to Query Columns section will appear
		Define a Fr	ree Form Drilling URL
		URLID http il.as &vc	ap Columns



Define a Free Form D	rilling URL					
Map Columns						
Map LIPL to Query (	olumne	Find L 7	First (4)	1.0 of 0	Last	
Selection Flag	Selection Flag Unique Field Name				Last	
	A.BUSINESS_UNIT					
	A.VENDOR_ID					
	A.VOUCHER_ID					
	A.ENTERED_DT					
	A.GROSS_AMT					
	A.INVOICE_ID					
	A.INVOICE_DT					
	A.OPRID					
	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** OK 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						
	~					
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					
ОКС	ancel					



25. Click OK . You will be taken back to Expressions .
26. Click Save .
27. Test Run the guery 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 Query 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.

Records			Aco	counts Paya	ble Wo	rkCenter		
Accounts Payable WorkCenter Main Reports/Queries	o «	Records Query Exp	ressions Prompts	Fields Criteria	Having	Dependency	Transformations	View
Queries Query Manager Public	0 •	Query Name SFS Click folder next to record to additional records by clickir	S_TEST o show fields. Check field ng the records tab. Wher	ds to add to query. U n finished click the fiel	Des ncheck fields lds tab.	scription Vouch	ers by UserID, date query. Add	range Ž∕
<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>		Chosen Records Alias Record A VOUCHER - AP N Chec	Voucher Header Table	Uncheck All			Hierarchy Join	

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 Query, like below:



Records		Accounts Payable WorkCenter
Accounts Payable WorkCenter           Main         Reports/Queries	o «	Records         Query         Expressions         Prompts         Fields         Criteria         Having         Dependency         Transformations         View
Queries  Query Manager  Public  Outstanding Checks  Review Payments by Vendor  Check Details  Vouchers by UserID, Date Range AP Payments Cleared Checks by BU	0 0 -	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.       20         Chosen Records       Alias       Record       Hierarchy Join         A VOUCHER - AP Voucher Header Table       Hierarchy Join       E         Chock All       Uncheck All       E         Fields       Find       View 100       First < 1-50 of 264
Canceled Check Details Tax Reports/Processes Reports to Run	0 0-	Image: Second state of the second s

- 6. 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 themon Query
- 7. 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