PeopleSoft Query Viewer Overview

PeopleSoft Query Viewer is an end-user reporting tool that allows users to view and run existing queries. **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 query owner.

<table>
<thead>
<tr>
<th>Process Frequency</th>
<th>Used on an ad hoc basis.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dependencies</td>
<td>Some knowledge of SFS records and data.</td>
</tr>
<tr>
<td>Assumptions</td>
<td>N/A</td>
</tr>
<tr>
<td>Responsible Parties</td>
<td>N/A</td>
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<tr>
<td>Alternate Scenarios</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Process Detail

I. Getting Started

*Navigation: Reporting Tools > Query*

There are three options for Query from the main menu:

- Query Manager- Allows you to create new queries and modify or run existing queries.
- Query Viewer- Allows you only to run existing queries.
- Schedule Query- Allows you to schedule an existing query to run sometime in the future.

II. Running an Existing Query

*Navigation: Reporting Tools > Query > Query Viewer*

1. **Clicking** here will return the first 300 queries available to you. To access additional queries it is necessary to specify search criteria. For additional criteria, **click** on the Advanced Search link:
2. **Enter** information needed to limit the results to a manageable set. This search is useful if you do not know the query name, but know a record the query uses.

3. In this example, the query name is UW_88_NVS_LIST_OF_ACCOUNTS. **Enter** in part or the entire name to get a list of queries. The more of the name entered, the more refined the results will be.

4. There are five options for the query:
   a. **Run to HTML** – Run this report to a HTML format.
   b. **Run to Excel** – Run this report to a Microsoft Excel format.
   c. **Run to XML** – Run this report to an XML format.
   d. **Schedule** – Run this report at some time in the future. The results will show up in the Report Manager and can also be e-mailed to you or other users. (See Section III)
   e. **Add to Favorites** – Add this query to your list of favorite queries. The query will then show up on the bottom of the query search pages to find easily. Below is an example:
5. This report will show up on the query search pages under the My Favorite Queries section until it is removed from the list. To remove a query, **click** under the Remove column, or **press** **Clear Favorites List** to remove all favorite queries from the list.

### III. Scheduling a Query

*Navigation: Reporting Tools > Query > Query Viewer*

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

1. To schedule a query from the **Query Viewer**, **click** on the **Schedule** hyperlink.

2. A run control is needed to schedule a query. A run control is a unique name given to a group of settings or configuration for output for a specific report.
3. Either **select** an existing run control or **create** a new run control for the query. By default, the screen goes to Add a New Value if no Run Control IDs have been set up. To search for an existing run control, use Find an Existing Value and search. Once you have created a Run Control ID for a specific query, the Scheduled Query screen will default to Add a New Value.

4. To add a new value, **Click** Add a New Value

5. **Type** in a Run Control ID

6. **Click** Add

7. **Enter** a Description for the query

8. **Click** Okay

9. **Enter** a value for any prompts in the query.

10. On the Process Scheduler Request page, you can set up the output for your query. Run scheduled queries on the ‘PSUNX’ server. Choose ‘PSUNX’ from the Server Name drop down menu.

11. **Select** the time that PeopleSoft should run the query, if different than the default time.

12. You can also **set** a recurrence, if you would like a report run more than once on a schedule.
13. **Select** a value from the *Type* dropdown menu that suits your output needs. You can also **select** an output format, using the values in the *Format* dropdown menu.

14. When using the ‘Email’ option (value under the *Type* dropdown menu), **click** on the *Distribution* link to set the e-mail options. You will see the Distribution Detail screen.

15. Under the Email Only section, **add** an e-mail subject, message text and email address(es) to the Email Address List box. The e-mail will send an attachment/link to the query results in the Report Manager.
16. The default distribution in the Distribute To section is only to the user that runs the query. If additional users need to view the query in the Report Manager, add them to the Distribute To section by clicking the \[+\]. Any users (or roles) selected here will be able to view the query in the Report Manager. Selecting a role will allow anyone with that role to view the query results. **NOTE:** You cannot add or lookup a user without first choosing a value from the ID Type dropdown menu.

17. Click \[OK\]. You will be taken back to the **Process Scheduler Request** screen.

18. Click \[OK\]

19. To view your scheduled report, navigate to the Report Manager. You should see a link to the **Report Manager** on the Schedule Query screen. If you do not have a link, you can navigate to the Report Manager as follows:

   Reporting Tools > Report Manager
20. Your report can be found on [Administration] under the Details link.

21. To schedule a query from the Main Menu, navigate as follows:
   Reporting Tools > Query > Schedule Query
22. Follow steps 2-19 as outlined above.

IV. Internet Explorer Settings for Query Download to Excel

Depending on the settings on your computer, when you run a query to Excel, it may or may not open in the Internet Explorer browser window. If Excel does open in the browser window, Excel functionality is not available. This setting is defined in Internet Explorer.
To adjust the settings:

1. **Open** an Internet Explorer Window.
2. **Choose** “Tools” from the menu in the upper right hand corner.

3. **Click** Internet Options.
4. In the Internet Options screen, **click** Security.
5. **Click** Custom level...
6. Scroll down to the “Downloads” heading.
8. Click **Yes**

9. Click **OK**
10. Click  
11. Click  
12. Excel will now open in a new window when opened.
Revision History

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<th>Author</th>
<th>Version</th>
<th>Date</th>
<th>Description of Change</th>
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<td>Andrea Vredberg</td>
<td>1.0</td>
<td>6/24/2013</td>
<td>Initial Draft from 8.9 version</td>
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<td>Stacy VanWormer</td>
<td>1.1</td>
<td>07/03/2013</td>
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<td>Susan Kincanon</td>
<td>1.2</td>
<td>07/23/2013</td>
<td>Review, edit, format</td>
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<td>Scott Larson</td>
<td>1.2</td>
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<td>Susan Kincanon</td>
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