

Contents

Peop	pleSoft Query Overview	1
Proc	ess Details - Joins	2
١.	Creating a Query with Multiple Records	2
II.	Creating Record Hierarchy Joins	3
III	. Creating Related Record Joins	6
IV	7. Creating Any Record Joins	7
V.	Left Outer Joins	. 11
VI	I. Using Having Criteria	. 12
VI	II. Using Wildcard Characters to Find Information	. 17
VI	III. Internet Explorer Settings for Query Download to Excel	. 20

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	Some knowledge of SFS records and data.
Assumptions	N/A
Responsible Parties	N/A
Alternate Scenarios	N/A

Process Details - Joins

Navigation: Reporting Tools> Query> Query Manager

Que	ry Manager	
Enter	any information yo	a have and click Search. Leave fields blank for a list of all values.
	Find an Exis	ing Query Create New Query
	*Search By	Query Name
[[Search	Advanced Search

I. Creating a Query with Multiple Records

Query Manager allows you to build queries with multiple-record joins. Joins retrieve data from more than one record. PeopleSoft Query links the records, based on common fields, and links the rows on the two records by common fields in shared columns.

Joined records must each include **at least one** field in both records that contain similar data. For example, if you want to join **Vendor** record and **Voucher** record, they both must contain a common field, such as a Vendor ID field, or a "High level" key field. (symbolized using a Key) to serve as a field on which the data can be joined. Records can be joined on multiple (similar) fields so long as the fields have the ability to match information. Typically (but not always) records are joined on key fields. Key fields are essentially the field(s) that make the record unique, and are shown in Query with a

symbol next to them. If you have a query with multiple records, and do not add joins or create incorrect joins, the results will return wrong information may result in a cartesian



join and the query could get stuck in a loop and never finish processing.....this is bad and the System Administrators will not like you.

Using joins, you define relationships among fields when you query the records. The procedure for joining records differs depending on how the records being joined are related to each other. Query Manager uses three types of joins: record hierarchy (parent-child relationships), related record (predefined relationships), and any record (relationships the user defines).

II. Creating Hierarchy Joins

A hierarchy join is similar to a parent/child relationship. An example of this is the JRNL_HEADER and JRNL_LN. This type of join is the easiest to create in Query and PeopleSoft completes the join automatically.

- 1. To create a Hierarchy Join, select the base record for your query (parent)
- 2. **Click** the *Hierarchy Join* link.



3. Records that have a parent/child relationship will appear.

Select record for hierarchy join

Left | Right

JRNL_CF_BAL_TBL - Journal Balances Table
JRNL_DRILL_VW - Journal Line DrillDown View
JRNL_OPENITM_VW - Open Item Journal View
OPEN_ITEM_GL - GL Open Item Table
UW_AP_JRNL_LN - Journal Line Data
UW_JRNL_BUD_VW - Journal Line Budget DrillDn Vw
UW_JRNL_DRL_VW - Journal Line DrillDown VW- Mod
UW_PO_JRNL_LN - Journal Line Data
UW_REDBOOK_LOAD - Redbook Budget lines



4. **Select** the child record to join to the parent record.....**select** JRNL_LN record. The join is reflected on . This action automatically creates the necessary joins needed between the two records.

Chose	n Records	
Alias	Record	
🗜 A	JRNL_HEADER - Journal Header Data	Hierarchy Join 📃
Ē B	JRNL_LN - Journal Line Data joined with A	Hierarchy Join 📃

- 5. You can **select** fields from either record to be included in the results, the same as a query with only one record.
- 6. Click a next to the record name to minimize the record, OR
- 7. Click = to view the fields from that record.
- 8. Once you have selected fields, click "View SQL" to see the automatically created join.



III. Creating Related Record Joins

In a Related Record join, you can automatically join two records based on a relationship that is predefined in the record design.

1. In the example below, the LEDGER record is used in the query. Notice there are several hyperlinks on the right hand side that say "Join..." **Clicking** on one of these hyperlinks will join the record automatically to the record you choose. Click on the link for Account.....



2. When you click on the link to add the record, you will be taken to the "Select join type" screen.

Select join type

Join	Туре		
ullet	Join to	filter and get add	ditional fields (Standard Join)
\bigcirc	Join to	get additional fie	lds only (Left outer join)
0	V	Canaal	
0	r.	Cancer	

- 3. **Choose** a join type
- 4. Click . (For information on Left Outer Joins, see <u>Section V</u>.)
- 5. Once you have joined the appropriate record(s), you can **add** fields to your query or view the fields from multiple records in your query.
- 6. Navigate between the records the same way as the Hierarchy Joins above, by clicking the
 next to the record name on Query



IV. Creating Any Record Joins

Query Manager allows the creation of a join between any two records. Query will attempt to automatically join the records based on the keys on each record, which may or may not be what you want. It is very important to understand the record structure to ensure the links created are appropriate. Additional joins may need to be added that Query does not create. Planning the query becomes more important as query complexity increases.

In this example, two AP records are used in the query - VENDOR_LOC and VENDOR_PAY.

- 1. Click Records
- 2. Enter the Record Name 'VENDOR_LOC' in the begins with field
- 3. Click Search

Search Results

Record	Personalize Find View 20	🔣 🛛 First 🔇	🕨 1 of 1 🕑 Last
Recname		Join Record	Show Fields
VENDOR_LOC - Supplier Loca	tion	Join Record	Show Fields



- 4. **Click** the *Add Record* hyperlink for the *Recname* VENDOR_LOC.
- 5. You will see the VENDOR_LOC record added to Query.

Records	Query	Expressions	Prompts	Fields	Criteria	Having	Dependency	Transformati	ons \
Q	uery Nam	e New Unsaved	Query			Des	cription		
Click folde additional	er next to re records by	ecord to show field clicking the recor	ls. Check fiel ds tab. Wher	ds to add to n finished cl	o query. Und ick the fields	heck fields t s tab.	o remove from q	uery. Add	Ŝ∅
Alias	Reco	rd OC - Supplier Loc	ation					Hierarchy Joi	n 🖃
E		Check All		Uncheck	All		Eirot 4	50 of 129	Loct
F		SETID - SetID			Find	View 100	Join SP_SETIE	-50 01 128 D_NONVW -	R
	• • •	VENDOR_ID - S VNDR_LOC - Su	upplier ID Ipplier Locati	on					94 94
		EFFDT - Effectiv EFF_STATUS - S	e Date Status as of E	Effective Da	ite				74 94 92
			- Currency	Coue			JOIN CONNEIN		
6. T 7. E	o selec E nter th	t the second e <i>Record N</i>	d record, <i>ame</i> 'VEl	click NDOR	Records PAY' in	the beg	ins with fiel	d	
8. C	lick	Search		_	-	5			
Sea	arch R	esults							

Record	Personalize Find View 20	🔣 🛛 First 🔇	🕨 1 of 1 🕑 Last
Recname		Join Record	Show Fields
VENDOR_PAY - Supplier Payr	nent Defaults	Join Record	Show Fields

9. **Click** the *Join Record* hyperlink for the *Recname* VENDOR_PAY.

Select join type and then record to join with VENDOR_PAY - Supplier Payment Defaults.

			He
Join T	уре		
	Join to filter and get additional field Join to get additional fields only (Le	s (Standard Join) aft outer join)	
Join R	lecord	Personalize Find 🗖 🔢	First 🕚 1 of 1 🕑 Last
A = VEN	IDOR_LOC - Supplier Location		



10. Select a Join Type

- A Standard Join will return data only if data is present that matches your criteria in <u>both</u> records.
- A Left Outer Join will return all data from the first record and additional data where the criteria are met on the second record. It will not filter the results to where the conditions are met on both records. (For more information on Left Outer Joins, see <u>Section V</u>.)

In this example, we will use a Standard Join, because we want data from the records where data is present in both records.

11. **Click** on the appropriate hyperlink in the *Join Record* section to add the second record to the query. In this example, there is only one additional record, VENDOR_LOC. PeopleSoft will create criteria based on the similar keys between each record.

			Но	
			116	lp
	Query has	detected the join conditions shown below.		
	Use the ch criteria wh	eckboxes to unselect the criteria that you do not want to add to the quent on done. The criteria added can always be modified later using the criteri	y and click add ia tab.	
		A.SETID - SetID = B.SETID - SetID		
		A.VENDOR_ID - Supplier ID = B.VENDOR_ID - Supplier ID		
		A.VNDR_LOC - Supplier Location = B.VNDR_LOC - Supplier Location	ı	
12	2. Click	Add Criteria Cancel		
Chosen Re	ecords			
Alias	Record			_
🕂 A VE	ENDOR_LOC	Supplier Location	Hierarchy Join	-
🗈 B VE	NDOR_PAY -	Supplier Payment Defaults	Hierarchy Join	-

13. You will see the VENDOR_PAY record added to Query



14. If additional criteria need to be entered, **navigate** to **Criteria** and add appropriate criteria, with the *Expression 1 Type* and *Expression 2 Type* for both being 'Field'. This would look like the following:

*	ung roos > Query > Query Manager	
it Criteria Properties		
Choose Expression 1	Expression 1	
Туре	Choose Record and Field	
Field	Record Alias.Fieldname:	
C Expression	rear a track and a second model with the second second	
C Expression	A.SETID - SetID	
*Condition Type: Choose Expression 2	equal to	
*Condition Type: Choose Expression 2 Type	equal to Expression 2 Choose Record and Field	
*Condition Type: Choose Expression 2 Type © Field © Expression © Constant	equal to Expression 2 Choose Record and Field Record Alias.Fieldname: B.SETID - SetID	

TIP: If you are unsure of the record structures and how the records are related, run the query with only one record at a time and review the information to determine proper relationships.

V. Left Outer Joins

Query Manager enables you to easily create a Left Outer Join. The query will then bring back <u>all</u> rows of the first (left) record in the result set, even if there are no matches in the joining record.

1. Select the Left Outer Join option for the Type of Join



		Н
Join Type		
Join to filter and get addition	onal fields (Standard Join)	
Join to get additional fields	only (Left outer join)	
Join Record	Personalize Find 💷 🔢	First 🕚 1 of 1 🕑 Last

When you **select** Left Outer Join as your Join Type, join to the most recently added record in the query, or you will receive an error message. If you are creating a query with more than 2 records, be sure to add the "left" record just before the "right" record.

Here is an example, following are two sample records and how the different joins would return data:

• Standard Join - Rows are returned <u>only</u> where there is data in both records. (Result set contains 6 rows)

Cust.# -	Customer First 🔹	Customer Last 🔹	Email 🔹	Order ID 🔹	Item 🚽	Item#	- Quantity -	Shipped 🔹	Total Order Amt 🔸
1	2 Frank	Smith	frankie@email.com	1	Sponge	29892974	4		\$25.25
1	3 Jennifer	Johnson	Jjgirl@email.com	(Napkins	20777744	100	V	\$4.55
1	3 Jennifer	Johnson	Jjgirl@email.com	2	Paper Plates	29379246	25		\$11.56
4	1 Robert	Green	begreen@email.mail	3	Napkins	29797746	100	V	\$4.55
(5 Timothy	Dominick	tdominick@emailaddressplace.com	1	Dish Towel	20742749	2		\$4.75
	5 Timothy	Dominick	tdominick@emailaddressplace.com		2 Scraper	28797294	1	V	\$5.23

• Left Outer Join - All rows are returned from the first (left) record, and any data from the second (right) record is also presented. (Result set contains 8 rows)

Cust.# - Customer First -	Customer Last	Email 🗸	Order ID 👻	Item 🚽	Item#	Quantity	Shipped -	 Total Order Amt +
1 Penny	Nickels	pnickels@email.com						
2 Frank	Smith	frankie@email.com	1	Sponge	29892974	4		\$25.25
3 Jennifer	Johnson	Jjgirl@email.com	4	Paper Plates	29379246	25	V	\$11.56
3 Jennifer	Johnson	Jjgirl@email.com	6	Napkins	20777744	100		\$4.55
4 Robert	Green	begreen@email.mail	5	Napkins	29797746	100	V	\$4.55
5 Suzy	Worthington	suzywor@emailaddy.com						
6 Timothy	Dominick	tdominick@emailaddressplace.com	2	Scraper	28797294	1	V	\$5.23
6 Timothy	Dominick	tdominick@emailaddressplace.com	3	Dish Towel	20742749	2		\$4.75

VI. Using Having Criteria

SQL does not support the use of aggregate functions in WHERE clauses. When an aggregate function is applied to a field (i.e. sum, count, etc.) you cannot add a typical limit to it. To limit rows based on the results of an aggregate function, Query Manager creates HAVING criteria.



An example of using a HAVING criteria would be to create a list of departments that have greater than \$5,000 posted to a particular account during a fiscal year.

When you click the *Add Criteria* icon from the Fields tab for an aggregate field, new criteria is added to Having tab instead of Criteria tab. The selection criteria using the

Having tab in the same way you add selection criteria using Criteria tab.

1. To add Having criteria, **go** to Fields tab.

VOIN	tes Main Menu & Reporting Tools & Query &	Query Mana	nor						
-	Main Mend / Reporting 1005 / Query /	Query mane	igei						
leco	ords Query Expressions Prompts Fiel	ds Crite	ria	Havin	g	View SQL Run	Ň		
	Query Name TEST_QUERY_HAVING_TAB			1	Descr	iption Demo of HAV	ING tab use		5 Fe
/iev	w field properties, or use field as criteria in query statem	nent.					F	Reorder / S	ort
Fiel	ds					Personalize Find V	ew Al 🚺 🚹	First 🚺 1-8	of 8 🖸 La
Col	Record.Fieldname	Format	<u>Ord</u>	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.DEPOSIT_BU - Deposit Unit	Char5				Unit	94	Edit	
2	A.DEPOSIT_ID - Deposit ID	Char15				Deposit ID	9.	Edit	
3	A.PAYMENT_SEQ_NUM - Payment Sequence	Num6.0				Seq	94	Edit	
4	A.PAYMENT_ID - Payment ID	Char15				Payment ID	94	Edit	
5	A.PAYMENT_AMT - Payment Amount	SNm25.3				Amount	9.	Edit	E
6	A.PAYMENT_STATUS - Payment Status	Char1		N		Status	94	Edit	
7	A.AR_WOAPPR_STATUS - Write-Off Approval Status	Char1		N		Status	9	Edit	-
	A DAVINENT NETLIOD, Davins and Mathad	Chara		N		Pay Mathod	9	Edit	

2. On the field you would like to aggregate, click

	Shared Financial System					
Favorites	Main Menu	> Reporting	g Tools	> Que	ery >	Query Ma
Edit Field Field Nar	1 Properti ne: A.PAYME	es ENT_AMT - Pa	yment An	nount		
Heading	1			Aggre	gate	
(C) Ma	Heading	RFT Shore	t	0	None	
© Te Headi	ext ng Text:	© RFT Long	1	Ö	Count	
© Te Headin Amou	ext ng Text: nt	© RFT Long		0	Count Min	
© Te Headin Amou *Uniqu	ext ng Text: nt e Field Name	© RFT Long		0000	Count Min Max Avera <u>c</u>	je
© Te Headin Amou *Uniqu A.PAY	ext ng Text: nt e Field Name MENT_AMT	© RFT Long e:		0000	Count Min Max Averag	je

Edit



Aggregate	Action
None	No action
Sum	Numeric total of values
Count	Number of rows returned in criteria
Min	Smallest numeric value
Мах	Largest numeric value
Average	Mean/Average numeric value

- 3. **Choose** an Aggregate function to perform on your field.
- 4. Click

	Shared Financial System								
avorit	es Main Menu > Reporting Tools > Query >	Query Mana	ger	_	_				
×									
Reco	ords Query Expressions Prompts Fiel	ds Crite	ria	Havin	g	View SQL Run			
	Query Name TEST_QUERY_HAVING_TAB			1	Descri	ption Demo of HAV	/ING tab use		Feed
Vio	v field properties, or use field as criteria in query statem	ant					R	eorder / S	ort
Fiel	ds	ient.				Democratica Find	2		of a Diana
Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.DEPOSIT_BU - Deposit Unit	Char5				Unit	9.	Edit	
2	A.DEPOSIT_ID - Deposit ID	Char15				Deposit ID	8	Edit	
3	A.PAYMENT_SEQ_NUM - Payment Sequence	Num6.0				Seq	9.	Edit	-
4	A.PAYMENT_ID - Payment ID	Char15				Payment ID	9.	Edit	
5	A.PAYMENT_AMT - Payment Amount	SNm25.3		<	Sum	Sum Amount	9.	Edit	
6	A.PAYMENT_STATUS - Payment Status	Char1		N		Status	9.	Edit	
7	A.AR_WOAPPR_STATUS - Write-Off Approval Status	Char1		N		Status	9.	Edit	Ξ

- 5. You will now see the aggregate function appear on Fields
- tab in the Agg column

6. Click Having

.

Shared Financial System		
rorites Main Menu > Reporting Tools > Query > Query Manag	ger	
ecords Query Expressions Prompts Fields Criteri	a Having View SQL Run	
Query Name TEST_QUERY_HAVING_TAB Add Having Criteria No having criteria have been added yet.	Description Demo of HAVING tab use	Feed -
Save Save As New Query Preferences Properties	Publish as Feed New Union	Return To Search
Save As New Query Preferences Properties	Publish as Feed New Union	Return To Search

7. Click Add Having Criteria

SFS_RPT.1.02.03_Intermediate_PeopleSoft_Query.docx



System	
ites Main Menu > Repor	ting Tools > Query > Query Manager
Having Criteria Prope	rties
noose Expression 1	Expression 1
pe	Choose Record and Field
Field	Record Alias.Fieldname:
© Expression	9
•	~
+Canaditian Torner	and the second second
"Condition Type:	equal to 👻
oose Expression 2	Expression 2
pe	Define Constant
🔊 Field	
© Expression	Constant:
Constant	
Prompt	
Prompt	

8. In the Expression 1 box, use the silver icon to select the field for Record Alias. Fieldname.

S S	ystem		
vorites	Main Menu > Report	ting Tools > Query > Query Manager	
lect a f	ield		
Select a	record to show fields	for Personalize Find	🖾 🛗 First 🗹 1 of 1 🖸 La
Select a <u>Alias</u>	record to show fields Record	for <u>Personalize</u> <u>Find</u> <u>Record Description</u>	Show Fields
Select a <u>Alias</u> A	record to show fields Record PAYMENT	for <u>Personalize Find</u> Record Description Payments	Show Fields
Select a <u>Alias</u> A Select a	record to show fields Record PAYMENT Fold	for <u>Personalize Find</u> Record Description Payments	Show Fields

9. Any fields that have aggregate functions will be available to choose from. **Click** the hyperlink to select your field.



nrres Wan Wenti > Renn	rting Tools > Query > Query Manager			
	Tang 1005 . Quer, . Quer, Hanager			
it Having Criteria Prope	erties			
Choose Expression 1	Expression 1			
Туре	Choose Record and Field			
Field	Record Alias.Fieldname:			
© Expression	A.PAYMENT_AMT - Payment Amount			
1				
*Condition Type:	greater than 👻			
Choose Expression 2	Expression 2			
Гуре	Define Constant			
Ciold				
Field	Constant: 5000.00			
© Expression				
© Expression © Constant				
© Expression © Constant © Prompt	22 22			

- 10. **Select** the appropriate *Condition Type* from the dropdown menu.
- 11. In the *Expression 2* box, enter your *Constant* in the Define Constant section in the same way you would define any other criteria. (In this instance, we are looking for any total payment amount greater than \$5,000.00.) Your screen should look something like this:
- 12. Click _____
- 13. You will now see your Having Criteria on Having. Having criteria cannot be seen on Criteria

Sha Fin Sys	red ancial tem					
Favorites M	ain Menu > R	eporting Tools > Query	 Query Manager 	ger		
Records	Query Exp	ressions Prompts	Fields Criter	ia Having View SQL	Run	
Qu	iery Name TE	ST_QUERY_HAVING_TAB		Description Dem	o of HAVING tab use	6
Add Havi	ng Criteria	Group Having Criteria				
Having Crit	eria			Personal	ize Find 🗖 🛗 First 🗹	1 of 1 🚺 Last
Logical	Expression	on1	Condition Type	Expression 2	Edit	Delete
	A.PAYMEI Amount	NT_AMT - Payment	greater than	5000.00	Edit	-

- 14. The limit setup is the same as a traditional limit; however, the SQL written behind the scenes is different.
- 15. Click View SQL



VII. 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:



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%							
	Search	Advanced Search									
	Search Results Too many items met your search criteria. Only the first 300 items displayed.										
	*Folder View All Folders V										
Check All Uncheck All *Action - Choose V Go						▼ Go					
Que	Query Personalize Find View 100 💷 🧱 First 🕚										
Select	Select Query Name		Descr		Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Sch
	SFS_1099_VNDR_DFLT_LOC		1099 Vendors WTHD Defa	ault LOCs	Public	1099_CLEANUP		HTML	Excel	XML	Scł
	SFS_ACH_EMP_VENDOR_SUM		EMP_VENDOR_ACH_SU	JM	Public		Edit	HTML	Excel	XML	Scł
	SFS_ACH_ERE_SUM		SFS_ACH_ERE_SUM		Public		Edit	HTML	Excel	XML	Scł
	SFS_ACH_EXT_VENDOR_SUM		SFS_ACH_EXT_VENDOR	R_SUM	Public		Edit	HTML	Excel	XML	Scł

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

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_% Search Advanced Search Search Results Too many items met your search criteria. Only the first 300 items displayed. *Folder View -- All Folders -v ▼ Go Check All Uncheck All *Action -- Choose --Query Personalize | Find | View 100 | 💷 | Edit Run to HTML Run to Excel Owner Folder Select Query Name Descr SFS_1099_VNDR_DFLT_LOC 1099 Vendors WTHD Default LOCs Public 1099_CLEANUP Edit HTML Excel XML SFS_ACH_EMP_VENDOR_SUM EMP_VENDOR_ACH_SUM Edit HTML Excel XML Public SFS_ACH_ERE_SUM SFS_ACH_ERE_SUM Public Edit HTML Excel XML SFS_ACH_EXT_VENDOR_SUM SFS_ACH_EXT_VENDOR_SUM Public Edit HTML Excel XML SFS ALL PO WITH FUND Public Edit HTML Excel XML

Query Manager

First



Search by Folder Name:

Query Manager										
Enter a	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 Folder Name										
	Search Advanced Search									
	Search Results									
	*Folder View All Folders	v								
С	Check All Uncheck All *Action - Choose - V Go									
Que	Query			Personalize Find View 100 🗷 🧱 🛛 First 🕚 1-30 of 167 🕑 Las						of 167 🕑 Last
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References
	COL_AP_OUTSTANDING_CHECKS_BU	List of outstanding checks	Public	SFS AP INVENTORY	Edit	HTML	Excel	XML	Schedule	Lookup References
	DORA_SFS_AM_ASSET_NET_BOOK_V2	Asset Net Book Value	Public	SFS AM INVENTORY	Edit	HTML	Excel	XML	Schedule	Lookup References
	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
	MIL_PRCH_NFY_PO_CORRECTIONS	New FY POs needing Correction	n Public	SFS PO INVENTORY	Edit	HTML	Excel	XML	Schedule	Lookup References
	PROJECT_LITE_BY_BU	Project Lite by BU/Date Range	Public	SFS GM INVENTORY	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

VIII. 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.
- 7. Under "Automatic prompting for file downloads", **choose** the "Enable" radio button.



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10. Click Apply

12. Excel will now open in a new window when opened.

Revision History

Author	Version	Date	Description of Change
Andrea Vredberg	1.0	06/24/13	Initial Draft from 8.9 version
Stacy VanWormer	2.0	07/26/13	Revision
Susan Kincanon	2.1	09/5/2013	Review, edit, format, add sections VI and VII for team review
Mike Niebanck	3.0	12/7/2013	Update to v9.2