PeopleSoft

Query Manager Activities

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Contents

SAN DIEGO COUNTY
OFFICE OF EDUCATION

PREPARED BY THE SDCOE CUSTOMER RESOURCE CENTER

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Activity 1: Create a New Query

WHAT YOU SHOULD BE ABLE TO DO	▪ **RECORDS TAB:** Add a record (table) ▪ **RECORDS TAB:** Add fields from a record. ▪ **RUN TAB:** Execute a query

Scenario: You want to create a query that provides a listing of all the department locations within your district. You want it to provide:

1. Location ID
2. Status
3. Department Description
4. Address (Street, City, St, Postal Code)

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

Directions:

1. Click on the **Create a New Query** link.
2. Search for Record Name: *LOCATION*
3. Click the **Add Record** link for the record. A message box will appear stating, "An effective date criteria has been automatically added for the effective dated record. (139, 60)" Click **OK.**
4. Within the LOCATION_TBL record, check the boxes for the Fields:
   - LOCATION - Location Code
   - EFF_STATUS - Status as of Effective Date
   - DESCR - Description
   - ADDRESS1 - Address Line 1
   - ADDRESS2 - Address Line 2
   - CITY - City
   - STATE - State
   - POSTAL - Postal Code
5. Click on the **Run** tab to execute the query and see results.
6. Click on any of the tabs (Example: **Fields**) and click **Save**.
7. Enter a name for the query following your districts naming procedure. Click **OK**.

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Activity 2: Add a Field (Existing Record)

WHAT YOU SHOULD BE ABLE TO DO	▪ **RECORDS TAB:** Add a field from an existing record (table) ▪ **FIELDS TAB:** Use Reorder/Sort to place a field in a particular column ▪ **FIELDS TAB:** Use Reorder/Sort to sort the results in a particular order

Scenario: You want to add **Site** to query *099_RP_AP_VOUCHERS_POSTED*. This is a simple modification where you add one field from an existing record (table) already used in the query. You want it to appear directly to the right of **Object**.

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

Directions:

1. Navigate to **Query Manager**. Search for query *099_RP_AP_VOUCHERS_POSTED.*
2. Click the **Edit** link for the query.
3. Click the **Run tab**. Use Acct Dt Range *01/01/2017 to 01/08/2017*. Select your District. Review the query results.
   - We need to add **Site** so it appears to the right of **Object**.
4. Click the **Query tab**.
   - There are various records (tables) being used. How many? ______
   - Note the letters in front of the Record.
5. Click the **Fields tab**. These are all of the fields in the query.
   - See A, B, and C in front of the Fieldnames? What are they used for?____
   - Which field # is **Object**? ______
   - Which record does **Object** pull from? Write the Alias. ______
6. Go to the **Query tab**. Find **Site**.
   - Which Record was the **Site** field in? ____________________
   - Select it so it is checked. This adds it to the query.
7. Go to the **Fields tab**.
   - Where does **Site** appear by default? _______________________________
   - Now we have to arrange it so it is after **Object**. Click **Reorder/Sort** at the top of the screen. Use the left side to arrange the order of the fields/columns. Which # should you enter for **Site** to make it appear to the right of **Object**? ______
8. Click the **Run tab** to run the query. Notice we haven't saved the query yet.
   - Verify the output matches what you expected.
   - How are the query results sorted? ____
   - Let's modify the query to sort by **Supplier Name**.
9. Click the **Fields tab**. Click **Reorder/Sort**.

- Use the right side to change the sort order of the results.
- How will you make the query sort by **Supplier Name**? ___________________________________

10. Click the **Run tab** to run the query.
    - Verify the output matches what you expected.
11. Save the query as your own.

Activity 3: Add Criteria

WHAT YOU SHOULD BE ABLE TO DO	▪ **FIELDS TAB:** Add criteria. You can add criteria from the Criteria, Fields, and Query tabs. Adding criteria from a field (it doesn't have to be a field in the query) skips having to fill out Expression 1.

Scenario: Run the 099_RP_SUPPLIERS_AND_1099 query. Note the status of the suppliers. You want to limit results to only include active suppliers.

Directions:

1. Navigate to **Query Manager**: Find 099_RP_SUPPLIERS_AND_1099
2. Click on **Fields** Tab, click on **Add Criteria** icon for the **Supplier Status** field.
3. Under "Expression 1", note the Record and Field is populated with the Alias and Field Name,

   A VENDOR_STATUS - Supplier Status
4. Change Condition Type to "in list"
5. Click on the look up tool for **List Members**. Click on the **Add Value** button for field names A (Approved) and E (Unapproved).
6. Click **OK.**
7. Verify the List Members are the ones you chose and click **OK.**
8. Click the **Run** tab and Verify the results
9. Click on any tab, click on **Save As** to save the query as your own.

Activity 4: Add a Record to an Existing Query

WHAT YOU SHOULD BE ABLE TO DO	▪ **RECORDS TAB:** Add a record (table) ▪ **RECORDS TAB:** Use a Left Outer Join ▪ **RECORDS TAB:** Add fields from a record. ▪ **RUN TAB:** Execute a query

Scenario: You want to add Payment Reference Number field to the M_AP_INV_PRELIST query to get corresponding warrant numbers for vouchers that had been paid**.**

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

Directions:

1. Search for the M_AP_INV_PRELIST query.
2. Click on the **Edit** link for the M_AP_INV_PRELIST query.
3. Run the Query. How many rows are returned? _______________
4. Click on **Records** tab.
5. Search for Record Name containing the string '*XREF'*.
6. Click on the **Show Fields** link for the Record PYMNT_XREF_VW - AP Payment Voucher Information.
7. Notice the record has the fields PYMNT_ID_REF - Payment Reference, BUSINESS_UNIT – Business Unit, and VOUCHER_ID – Voucher ID.
8. Click on the **Join Record** link for the PYMNT_XREF_VW - AP Payment Voucher Information record.
9. For Join Type, select **Join to get additional fields (Left outer join)**.
10. Click on **Record A = VOUCHER - AP Voucher Header Table**.
11. An Auto Join Criteria message box will appear. Click the **Add Criteria** button.
12. Click on the **Query** tab.
13. Click on the PYMNT_XREF_VW - AP Payment Voucher Information record.
14. Select the PYMNT_ID_REF - Payment Reference field.
15. Click the **Run** tab.
16. Verify the query now contains the additional field (Reference) to the right of the PO No. field.
17. How many rows were returned? ______________
18. Save the query as your own.

Activity 5: Add a Prompt

WHAT YOU SHOULD BE ABLE TO DO	▪ **FIELDS TAB:** Add Object and Date Range Prompts. ▪ **PROMPTS TAB:** Edit the prompt label.

Scenario: The *099_AP_VOUCHERS_POSTED* query does not include prompts for Date Range or Object. You would like to include them to narrow down results.

Directions:

1. Navigate to **Query Manager**. Find *099_AP_VOUCHERS_POSTED.*
2. Click the **Run tab**. The results set may be too large. Create prompts to narrow down the results.
3. Go to the **Fields tab**. Make sure the field you want to prompt is there. In this example, you're checking that Object and Accounting Date are part of the query.
4. Click the **Add Criteria** icon for the field you want to add the prompt to.

   To add an **Object** prompt:

   - Click the **Add Criteria** icon for the **Object** field.
   - Expression 2 Type = Prompt
   - Condition Type = like. By choosing "like" you can type in the % sign to run the query for *all* types in the status field; if you select Equals, the user is forced to always run it by a *specific* type for that field.
   - Click New Prompt
   - Edit Type = No Table Edit. Doing this allows you to use the % sign. If you select Prompt Table you can't use the % sign.
   - Click on the lookup tool for Prompt Table and click the No Value button to remove the Prompt Table.
   - Click OK to get back to the **Fields** tab.

   To add a **Date Range** prompt:

   - Click on the **Add Criteria icon** for the **Accounting Date** field.
   - Expression 2 Type = Prompt
   - Condition Type leave as equal to
   - Click the **New Prompt** link, under **Heading Text**, add *"From"* ahead of "**Acctg Date**"
   - Click OK.
   - You will see a ":3" next to Prompt.
   - Click on **New Prompt** again, under **Heading Text**, add "*To*" ahead of "Acct Date". The field should read **"To Acctg Date".**
   - Click OK
   - You will see a ":4" next to Prompt
   - For Condition Type, click "between". New options appear for Expression 2 Type. Click on "Expr – Expr."
   - Click on the **Add Prompt** link under **Define Expression** and select **Prompt :3 = ACCOUNTING_DT – From Acctg Dt**.
   - Repeat for **Define Expression 2** but select **Prompt :4 = ACCOUNTING_DT – To Acctg Date**.

- Click OK

5. Click the **Prompts tab**. Verify you see prompts for Object, From Acctg Date and To Acctg Date to (the prompts you just added).
6. Click the **Run tab**. Use date range 01/01/2017 – 01/08/2017.
   - Test the % sign. Does it work? ______
7. Save as your own.

Activity 6: Format a Query

WHAT YOU SHOULD BE ABLE TO DO	▪ **FIELDS TAB:** Change how a field is displayed in the query. For example, change "Line" to "Voucher Line". ▪ **PROMPTS TAB:** Add % to how a field is displayed to remind the user it is an option.

Scenario: The *099_AP_VOUCHERS_POSTED* query has a field labeled "Line". Let's change it to "Voucher Line".

Directions:

1. Navigate to **Query Manager**. Find *099_AP_VOUCHERS_POSTED*.
2. Go to the **Fields tab**. Review the column that shows how fields display (Heading Text).
3. Find **Line**. Click **Edit**. Change the Heading to Text. Type "*Voucher Line*." Click **OK**.
4. Click the **Prompts tab**. Click the **Edit** button for the Object prompt. Let's add a % to the end of "Object" to remind the user it is an entry option. Example: Object %.
5. Click the **Run tab** to verify the % was added.
6. Save.

Activity 7: Actions

WHAT YOU SHOULD BE ABLE TO DO	▪ **ACTIONS MENU:** Do the following: Add a query to your favorites, copy a private query to another user, move a query to a folder, rename a query and delete a query. ▪ View and edit a query's properties.

Directions:

1. Navigate to **Query Manager**. Find any query.
2. Click the **Actions** dropdown menu.

Add to Favorites	Adds the query to your favorites, just like Query Viewer.
Copy to User	This is relevant to Private queries. When you create a Private query and want to share it with someone, use this option.
Move to Folder	To move a query to a folder (like HR, PAYROLL, ACCOUNTS PAYABLE, GENERAL LEDGER, etc.). For example, categorize. M_HR_ACT_ONLY as HR. If you need to create a new folder, please see Vanessa or Peyri.
Rename Selected	Can only rename your own private query
Delete Selected	Only your own Private Queries

Directions:

1. Navigate to **Query Manager**. Find any query.
2. Click **Properties** to see/edit information about the query – last updated, public/private, folder name, etc.

Activity 8: Putting It All Together (Activities 2-7)

Find 099_RP_AP_UNPAID_VCHR

1. Add new field Supplier Name. Sort to make Supplier Name appear to the right of Supplier ID.
2. Add Criteria that omits Closed Vouchers.
3. Add a Date Range prompt for Invoice Date.
4. Sort results by Voucher ID
5. Rename the Heading Text "Supplier" to "Supplier ID" for the Supplier ID Fieldname.
6. Put in the Accounts Payable folder.