

Basic Query 8.4

**PeopleSoft 8.4
Training Manual**

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SECTION 1

Introduction

OVERVIEW

The intent of this course is to demonstrate the features of PeopleSoft Query Release 8.4. This course is designed to teach users how to create queries using PeopleSoft's Query tool.

OBJECTIVES

By the end of this course, you will be able to:

- Open existing queries
- Create new queries using the Component and Designer Views
- Specify selection criteria and sorts
- Generate run-time prompts
- Send query results to Excel
- Perform a simple join between two tables

SECTION 2

Query Overview

OVERVIEW

This lesson reviews how to access Query, as well as how to run an existing query. You will also learn about the various components of the query definition. In later lessons, we will use this acquired knowledge to build and execute queries.

OBJECTIVES

By the end of this section, you will be able to:

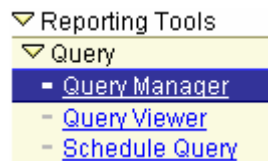
- Access Query
- Understand new Query terminology
- Open an existing query
- Run an existing query
- View query results
- Set preferences

2.1 Accessing Query Manager

To provide a quick introduction to Query, you will access and run an existing query. Once you execute the query, the results will be displayed on the screen within a grid control. Once you are logged on to PeopleSoft, perform the following steps to access Query Manager.

Navigation:

- Reporting Tools
- Query
- Query Manager



The **Query Manager** page displays:

Query Manager

Find an Existing Query

Search by: ***Query Type:**

[Create New Query](#)

From the **Query Manager** page you can open a query, modify an existing query, run an existing query, or create a new query.

2.2 Opening an Existing Query

If you have predefined queries, you can open and/or execute them easily. As new queries are defined they can be saved and executed as well.

- Enter a part or all of the query name
 - For this example, type **SLO_GL**
 - Press the **Search** button
 - The list of available queries displays
 - Click the hyperlink for the **SLO_GL_CASHBAL_NONTRST_T** query

Query Manager

Find an Existing Query

Search by: *Query Type:

[Create New Query](#)

Search Results

Query			First	1-21 of 21	Last
SLO_GL_ABNORMAL_CREDITS_T	DAF-Abnormal Balance-credit	Public	Run	Schedule	
SLO_GL_ABNORMAL_DEBITS_T	DAF-Abnormal Debits	Public	Run	Schedule	
SLO_GL_APXBATCH_CHKS_T	SEC-APX Batch Vouchers/Checks	Public	Run	Schedule	
SLO_GL_CASHBAL_NONTRST_T	SEC-Cash balances-non trust	Public	Run	Schedule	
SLO_GL_CASHBAL_TRUST_T	SEC-Cash balances-trust	Public	Run	Schedule	
SLO_GL_CASHNET_SAM11_P	KEA - CashNet totals by batch	Public	Run	Schedule	

NOTE: Only queries that have been saved as public, as indicated in the third column of the search results above, are available to all users. If this column contains “Private”, only the person who created that query has access to it.

[Records](#) [Query](#) [Expressions](#) [Prompts](#) **Fields** [Criteria](#) [Having](#) [View SQL](#) [Preview](#)

Query Name: SLO_GL_CASHBAL_NONTRST_T Description: SEC-Cash balances-non trust

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

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.LEDGER - Ledger	Char10				Ledger		<input type="button" value="Edit"/>	<input type="button" value="-"/>
2	A.FUND_CODE - Fund Code	Char5	1			Fund		<input type="button" value="Edit"/>	<input type="button" value="-"/>
3	A.ACCOUNT - Account	Char10				Account		<input type="button" value="Edit"/>	<input type="button" value="-"/>
4	A.POSTED_TOTAL_AMT - Posted Total Amount	SNm25.3			Sum	Sum Total Amt		<input type="button" value="Edit"/>	<input type="button" value="-"/>
5	A.FISCAL_YEAR - Fiscal Year	Num4.0				Year		<input type="button" value="Edit"/>	<input type="button" value="-"/>
6	B.DESCR - Description	Char30				Descr		<input type="button" value="Edit"/>	<input type="button" value="-"/>
7	A.BUSINESS_UNIT - Business Unit	Char5				Unit		<input type="button" value="Edit"/>	<input type="button" value="-"/>

[Save As](#)

[New Query](#)

[Preferences](#)

[Properties](#)

[New Union](#)

When the query opens, the **Fields** page is initially displayed. This page lists the fields to be selected by this query as well as a number of each field's properties as pertains to the query.

2.3 Running a Query

To run a query, click the Preview folder tab on the far right. Note that this method will work when you first open a query or create a new query. In order to rerun a query that you have open you will need to click on the Preview tab and then click on the **Rerun Query** hyperlink.

Records Query Expressions Prompts **Fields** Criteria Having View SQL Preview

Query Name: SLO_GL_CASHBAL_NONTRST_T Description: SEC-Cash balances-non trust

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.LEDGER - Ledger	Char10				Ledger		Edit	-
2	A.FUND_CODE - Fund Code	Char5	1			Fund		Edit	-
3	A.ACCOUNT - Account	Char10				Account		Edit	-
4	A.POSTED_TOTAL_AMT - Posted Total Amount	SNm25.3			Sum	Sum Total Amt		Edit	-
5	A.FISCAL_YEAR - Fiscal Year	Num4.0				Year		Edit	-
6	B.DESCR - Description	Char30				Descr		Edit	-
7	A.BUSINESS_UNIT - Business Unit	Char5				Unit		Edit	-

Save As New Query Preferences Properties New Union Return to Search

When the query has finished running, the results are displayed in a grid format.

To run the output to an Excel spreadsheet click the **Download to Excel** hyperlink.

Records Query Expressions Prompts Fields Criteria Having View SQL **Preview**

View All | [Rerun Query](#) | [Download to Excel](#) First 1-39 of 39 Last

	Ledger	Fund	Account	Sum Total Amt	Year	Descr	Unit
1	ACTUALS	AD201	101001	24061.700	2003	2001-2002 General Fund Expense	SLCMP
2	ACTUALS	AD202	101001	-3704.290	2003	2002-2003 General Fund Expense	SLCMP
3	ACTUALS	AD203	101001	-753415.350	2003	2003-2004 General Fund Expense	SLCMP
4	ACTUALS	BD201	101001	-0.180	2003	2001-2002 Reimb Activity Exp	SLCMP
5	ACTUALS	BD202	101001	29988.270	2003	2002-2003 Reimb Activity Exp	SLCMP
6	ACTUALS	BD203	101001	24378.460	2003	2003-2004 Reimb Activity Exp	SLCMP
7	ACTUALS	BF202	101001	87656.240	2003	2002-2003 Reimb Activity Rev	SLCMP
8	ACTUALS	BF203	101001	37495.180	2003	2002-2003 Reimb Activity Rev	SLCMP

2.4 Setting Preferences

You are able to modify your Query Manager by setting preferences.

Click the **Preferences** hyperlink found at the bottom of the Query Manager pages.

18 A.BALANCING_LINE - Balancing Line	Char1	Balancing Line		Edit	-
--------------------------------------	-------	----------------	---	-------------	----------

 [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [New Union](#) 

The **Query Preferences** page allows you to control the display of records by either description or name and description.

The “Enable Auto Join” checkbox is used to automatically determine the join conditions when a new record component is added.

Query Preferences

*Name Style: ▼

Enable Auto Join

(Query will automatically determine the join conditions for you when a new record component is added)

2.5 Exiting a Query

In version 8.4, in order for changes made to a query to take effect, the query must be explicitly saved. As a result, you will be prompted to save changes to a modified query if you exit Query Manager. If you modify a query, you may run it before you save it.

SECTION 3

Creating a Query

OVERVIEW

This lesson illustrates how to create and execute a new query. In addition, we will save and modify the query. Building on these skills, we will then make the query more complex by adding such operations as sorts, and aggregate functions.

OBJECTIVES

By the end of this section, you will be able to:

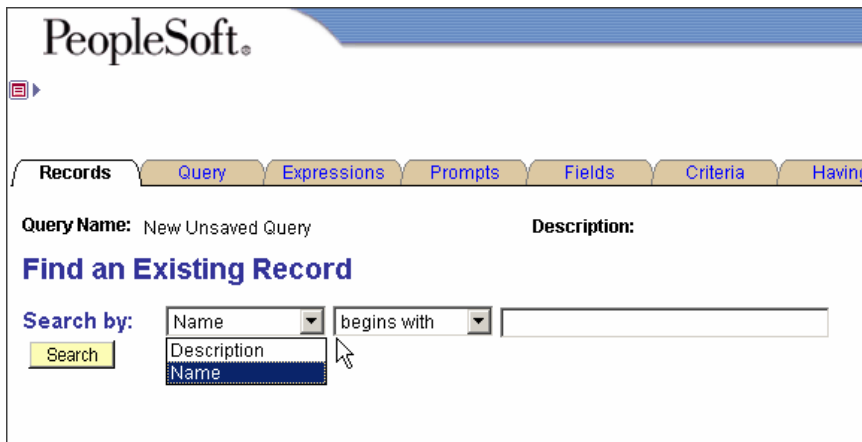
- Create queries
- Save queries
- Change headings
- Sort query output
- Use aggregate functions such as count and average

3.1 Selecting a Record

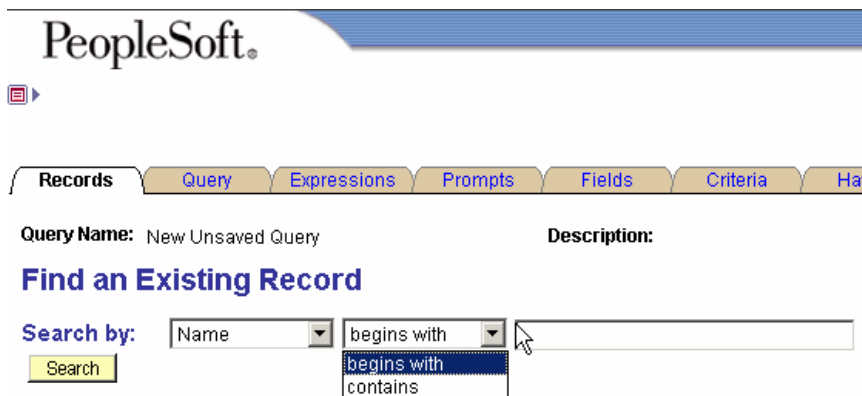
In order to create a new query, we will work with the LEDGER record to create a query that will gather information about account balances and funds. We will start with some very simple concepts and build on these skills to create a more complete and useful query.

The first step in creating a query is selecting a record. You want to choose the record that will be the primary focus of your query. For example, if you want information about account balances with certain funds you may want to select the LEDGER record.

To create our new query, we must locate the LEDGER record. There are several different methods to select a record from this page. You can search by Name or Description and select either begins with (shown below) or contains certain letters.



The screenshot shows the PeopleSoft interface with the 'Records' tab selected. The 'Query Name' is 'New Unsaved Query' and the 'Description' is blank. The section is titled 'Find an Existing Record'. Under 'Search by:', there are two dropdown menus. The first dropdown is set to 'Name' and the second is set to 'begins with'. A search input field is to the right of the second dropdown. A 'Search' button is located below the first dropdown. A mouse cursor is hovering over the 'Name' dropdown menu, which is open, showing 'Description' and 'Name' as options.



The screenshot shows the PeopleSoft interface with the 'Records' tab selected. The 'Query Name' is 'New Unsaved Query' and the 'Description' is blank. The section is titled 'Find an Existing Record'. Under 'Search by:', there are two dropdown menus. The first dropdown is set to 'Name' and the second is set to 'begins with'. A search input field is to the right of the second dropdown. A 'Search' button is located below the first dropdown. A mouse cursor is hovering over the second dropdown menu, which is open, showing 'begins with' and 'contains' as options.

For our example, leave the drop-down values as they are and type the first few characters of the record name ("LED" in the example shown below), and then press the **Search** button.

Click the [Add Record](#) hyperlink for the record to add it to the query (in this case, select [Add Record](#) for the LEDGER record.)

PeopleSoft.

Records Query Expressions Prompts Fields Criteria Having

Query Name: New Unsaved Query Description:

Find an Existing Record

Search by: Name begins with LED

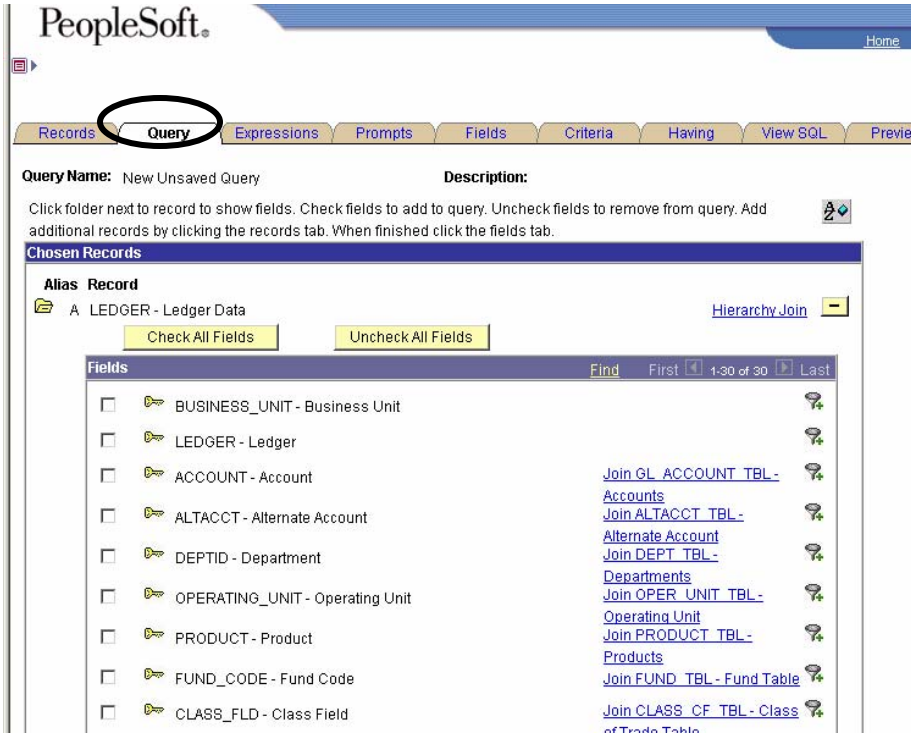
Search

Search Results

Record Find | View All First 1-19 of 19 Last

+	LEDGER - Ledger Data	Add Record
+	LEDGER_ADB - ADB Ledger Data	Add Record
+	LEDGER_ADB_MTD - ADB Ledger Data	Add Record
+	LEDGER_ADB_QTD - ADB Ledger Data	Add Record
+	LEDGER_ADB_YTD - ADB Ledger Data	Add Record
+	LEDGER_BUDG - Budget Ledger Data	Add Record
+	LEDGER_BUDG_KK - Ledger Data	Add Record
+	LEDGER_CODE_DTL - Ledger Code	Add Record
+	LEDGER_CODE_TBL - Ledger Code	Add Record
+	LEDGER_KK - Ledger Data	Add Record
+	LEDGER_PROJ - Project Based Ledger	Add Record
+	LED_DEFN_TBL - Ledger Definition	Add Record

Once a record has been selected, the **Query** page is activated. All fields contained in the selected record, LEDGER, are displayed:



Activity #1 - To create a list of account balances by period within a fund, select the LEDGER record using one of the navigation options defined. Follow the above example as a guideline.

3.2 Selecting Fields

The next step in defining a query is to select the fields that will comprise the output columns.

Navigation options for selecting fields:

- Manually select individual fields by checking the “field” check boxes to the left:

PeopleSoft. Home

Records Query Expressions Prompts Fields Criteria Having View SQL Prev

Query Name: New Unsaved Query Description:

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

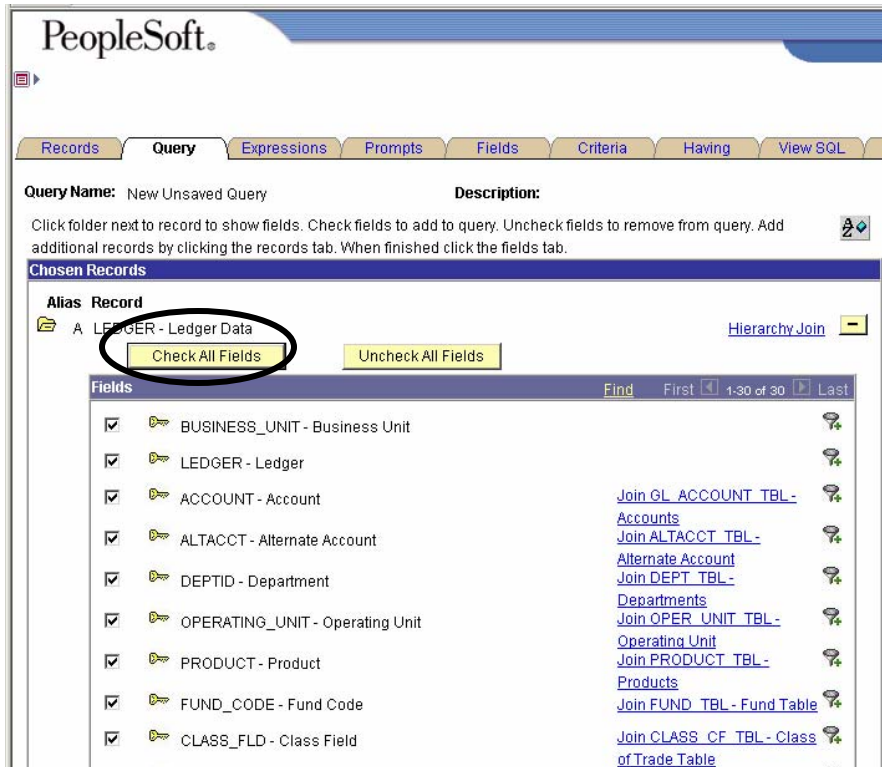
A LEDGER - Ledger Data Hierarchy Join -

Check All Fields Uncheck All Fields

Fields Find First 1-30 of 30 Last

<input checked="" type="checkbox"/>	BUSINESS_UNIT - Business Unit	
<input type="checkbox"/>	LEDGER - Ledger	
<input checked="" type="checkbox"/>	ACCOUNT - Account	Join GL_ACCOUNT_TBL - Accounts
<input type="checkbox"/>	ALTACCT - Alternate Account	Join ALTACCT_TBL - Alternate Account
<input type="checkbox"/>	DEPTID - Department	Join DEPT_TBL - Departments
<input type="checkbox"/>	OPERATING_UNIT - Operating Unit	Join OPER_UNIT_TBL - Operating Unit
<input type="checkbox"/>	PRODUCT - Product	Join PRODUCT_TBL - Products
<input checked="" type="checkbox"/>	FUND_CODE - Fund Code	Join FUND_TBL - <u>Lookup Table Join</u>
<input type="checkbox"/>	CLASS_FLD - Class Field	Join CLASS_CF_TBL - Class of Trade Table

- Or, select all fields by pressing **Check All Fields** button:



Activity #2 - Create a list of account balances by period within a fund: select the BUSINESS_UNIT, LEDGER, ACCOUNT, FUND_CODE, FISCAL_YEAR, ACCOUNTING_PERIOD, AND POSTED_TOTAL_AMT fields using one of the navigation options defined. Follow the example as a guideline.

Select the **Fields** page to view the selected fields and their properties.

The column order is indicated in the column titled "Col".

When a field is selected for output its column sequence number is displayed in the Col column.


The sequence number represents the left to right order of the displayed fields in the query output:

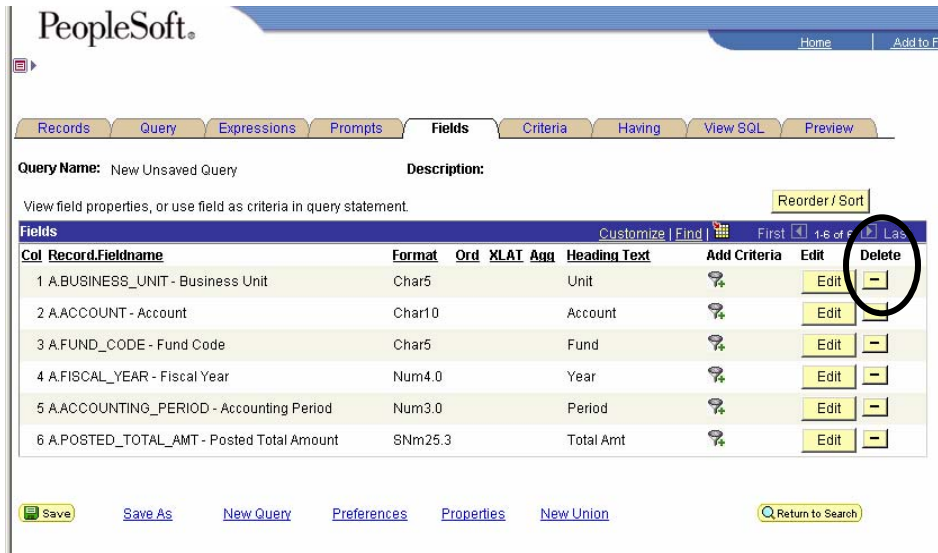
The screenshot shows the PeopleSoft interface for the 'Fields' page. The 'Fields' tab is selected and circled. Below the navigation tabs, the 'Query Name' is 'New Unsaved Query' and the 'Description' is empty. A 'Reorder / Sort' button is visible. The main table lists the following fields:

Col	Record	Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A	BUSINESS_UNIT - Business Unit	Char5				Unit		Edit	-
2	A	LEDGER - Ledger	Char10				Ledger		Edit	-
3	A	ACCOUNT - Account	Char10				Account		Edit	-
4	A	FUND_CODE - Fund Code	Char5				Fund		Edit	-
5	A	FISCAL_YEAR - Fiscal Year	Num4.0				Year		Edit	-
6	A	ACCOUNTING_PERIOD - Accounting Period	Num3.0				Period		Edit	-
7	A	POSTED_TOTAL_AMT - Posted Total Amount	SNM25.3				Total Amt		Edit	-







At the bottom of the page, there are buttons for 'Save', 'Save As', 'New Query', 'Preferences', 'Properties', 'New Union', and 'Return to Search'.

3.3 Removing Fields

To remove a field from your query output, press the “Delete”  button on the field’s line.



The screenshot shows the PeopleSoft query editor interface. At the top, there is a navigation bar with tabs for Records, Query, Expressions, Prompts, Fields, Criteria, Having, View SQL, and Preview. Below this, the 'Fields' tab is active, and a table lists the fields in the query. The table has columns for Col, Record, Fieldname, Format, Ord, XLAT, Agg, Heading Text, Add Criteria, Edit, and Delete. The 'Delete' column contains minus signs (-) for each field. The first field, 'A.BUSINESS_UNIT - Business Unit', has its 'Delete' button circled in red. Below the table, there are buttons for Save, Save As, New Query, Preferences, Properties, New Union, and Return to Search.

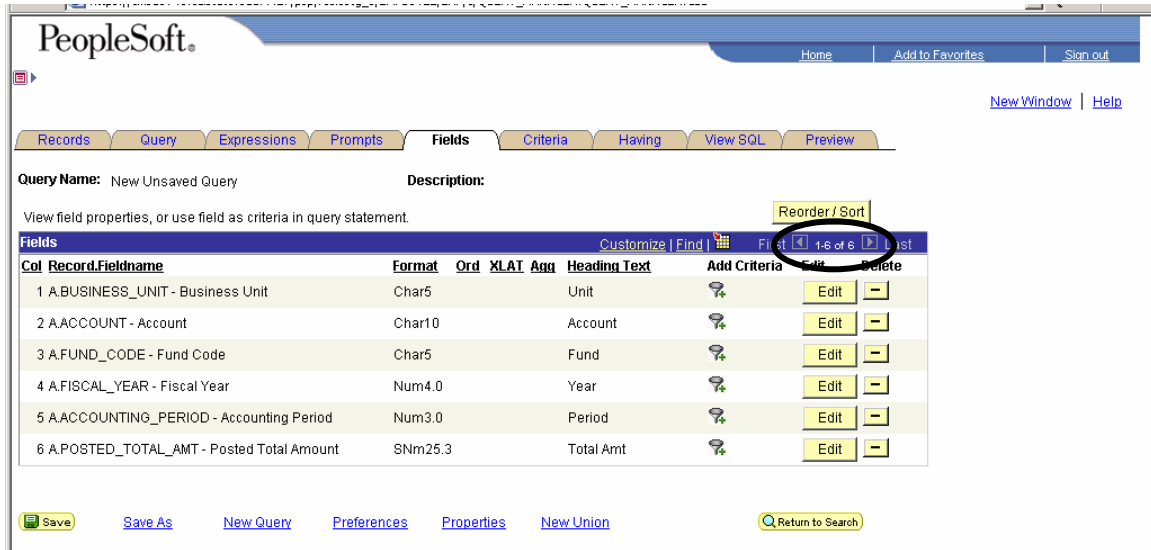
Col	Record	Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.	BUSINESS_UNIT - Business Unit	Char5				Unit		Edit	-
2	A.	ACCOUNT - Account	Char10				Account		Edit	-
3	A.	FUND_CODE - Fund Code	Char5				Fund		Edit	-
4	A.	FISCAL_YEAR - Fiscal Year	Num4.0				Year		Edit	-
5	A.	ACCOUNTING_PERIOD - Accounting Period	Num3.0				Period		Edit	-
6	A.	POSTED_TOTAL_AMT - Posted Total Amount	SNm25.3				Total Amt		Edit	-

Activity #3 - Modify the query field list by removing the LEDGER field so that the remaining query fields are as shown above.

3.4 Running Queries

As mentioned in section 2.7, in version 8.4, a new or modified query does not have to be saved before you can run it.

You may run the query before saving (by clicking on the **Preview** tab); however, you may wish to save the query first by using the standard SLO naming convention. You should save your query as a Private Query. Public Queries may only be saved in compliance with SLO Public Query Request Process Guide.



Click the **Save As** link at the bottom of the page to save the new query.

Enter the query name (use a prefix of "SLO_", to indicate a San Luis Obispo custom query, followed by Office/Function code "XXX_", then the query name, followed by T for Template or P for Prompt). Note that this is the standard naming convention for Public queries (as outlined in the Public Query Request Process Guide); for Private queries you may use any structure that you choose.



PUBLIC QUERY PROCESS

Add a short description, the query type (in this case "User"), and the owner (in this case "Private"). The Query Definition section allows you to enter a much more detailed description of the query if desired:

Query Manager - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address https://cmsdev-fs.calstate.edu:4427/psp/f8slostg_1/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MANAGER.GBL

PeopleSoft® Home Add to Favorites Sign out

[New Window](#) | [Help](#)

Enter a name to save this query as:

*Query: SLO_GL_TRAIN1_T

Description: Training Query

*Query Type: User

*Owner: Private

Query Definition:
Training Query

OK Cancel

javascript:submitAction_win1(document.win1,'QRYPROP_WRK_QRYOK');

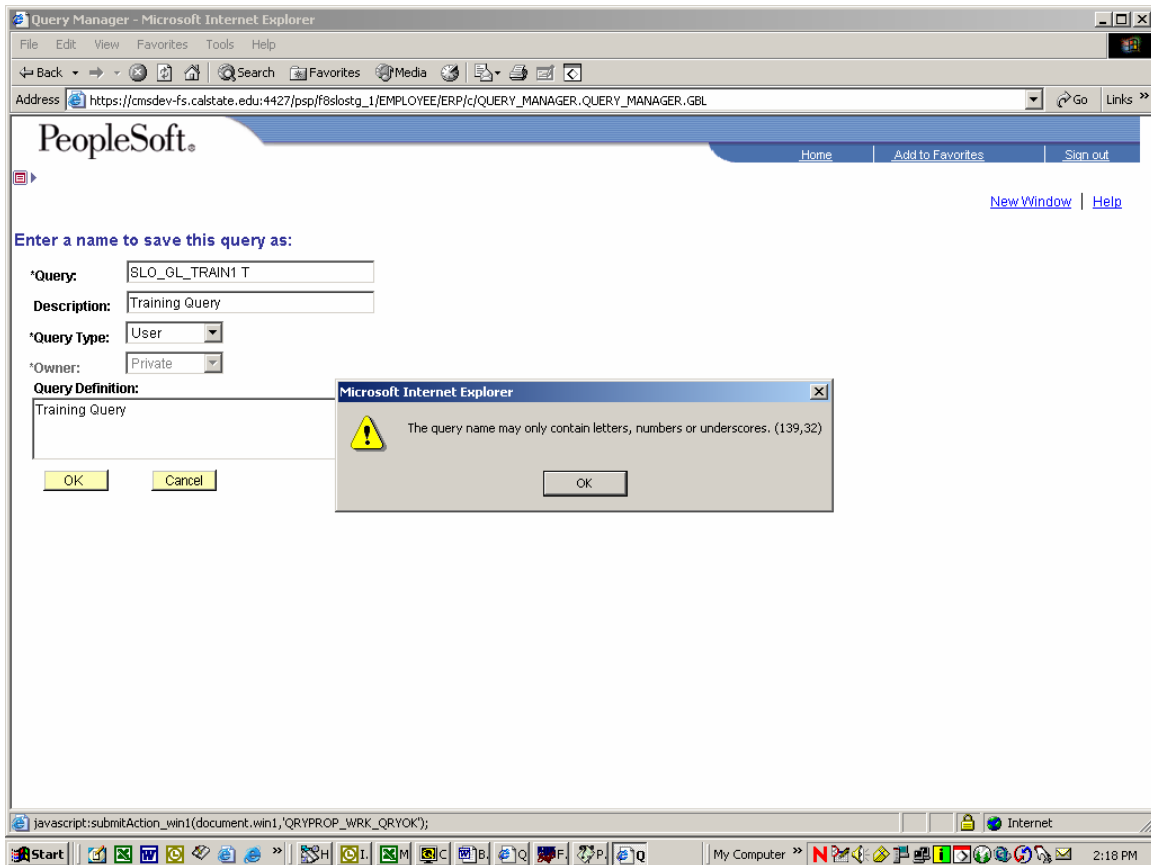
Start My Computer 2:11 PM

Users are only allowed to make or change private queries unless they follow the correct process below is a link to the public query request form.



Public Query Request Form

Be sure to avoid using spaces in the query name or you will receive the following error:



Notice that the query name has changed from “New Unsaved Query” to “SLO_GL_TRAIN1_T”:

Query Name: SLO_GL_TRAIN1_T Description: Training Query

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				Unit		Edit	-
2	A	ACCOUNT - Account	Char10				Account		Edit	-
3	A	FUND_CODE - Fund Code	Char5				Fund		Edit	-
4	A	FISCAL_YEAR - Fiscal Year	Num4.0				Year		Edit	-
5	A	ACCOUNTING_PERIOD - Accounting Period	Num3.0				Period		Edit	-
6	A	POSTED_TOTAL_AMT - Posted Total Amount	SNm25.3				Total Amt		Edit	-

[Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [New Union](#) [Return to Search](#)

Click the **Preview** tab to execute the query.

Output will be displayed in a new window:

PeopleSoft.

Home Add to Favorites Sign out

New Window Help

Records Query Expressions Prompts Fields Criteria Having View SQL Preview

View All | Rerun Query | Download to Excel First 1-100 of 41968 Last

	Unit	Account	Fund	Year	Period	Total Amt
1	SLCMP	101001	AD198	1999	12	191749.200
2	SLCMP	101001	AD199	1999	12	100475.280
3	SLCMP	101001	BF198	1999	12	-1178.860
4	SLCMP	101001	BF199	1999	12	553313.750
5	SLCMP	101001	CR198	1999	12	3337.520
6	SLCMP	101001	CR199	1999	12	219415.220
7	SLCMP	101001	FA001	1999	12	21009.610
8	SLCMP	101001	FC001	1999	12	35.500
9	SLCMP	101001	HA005	1999	12	133.990
10	SLCMP	101001	HA006	1999	12	210.000
11	SLCMP	101001	HAR01	1999	12	43514.390
12	SLCMP	101001	HAR03	1999	12	40062.000
13	SLCMP	101001	JB001	1999	12	58675.920
14	SLCMP	101001	JBR01	1999	12	40.000
15	SLCMP	101001	JC001	1999	12	26047.800
16	SLCMP	101001	JDR01	1999	12	936.600
17	SLCMP	101001	KA001	1999	12	31902.910
18	SLCMP	101001	MC001	1999	12	-17719.400
19	SLCMP	101001	MD003	1999	12	-26538.390

Internet

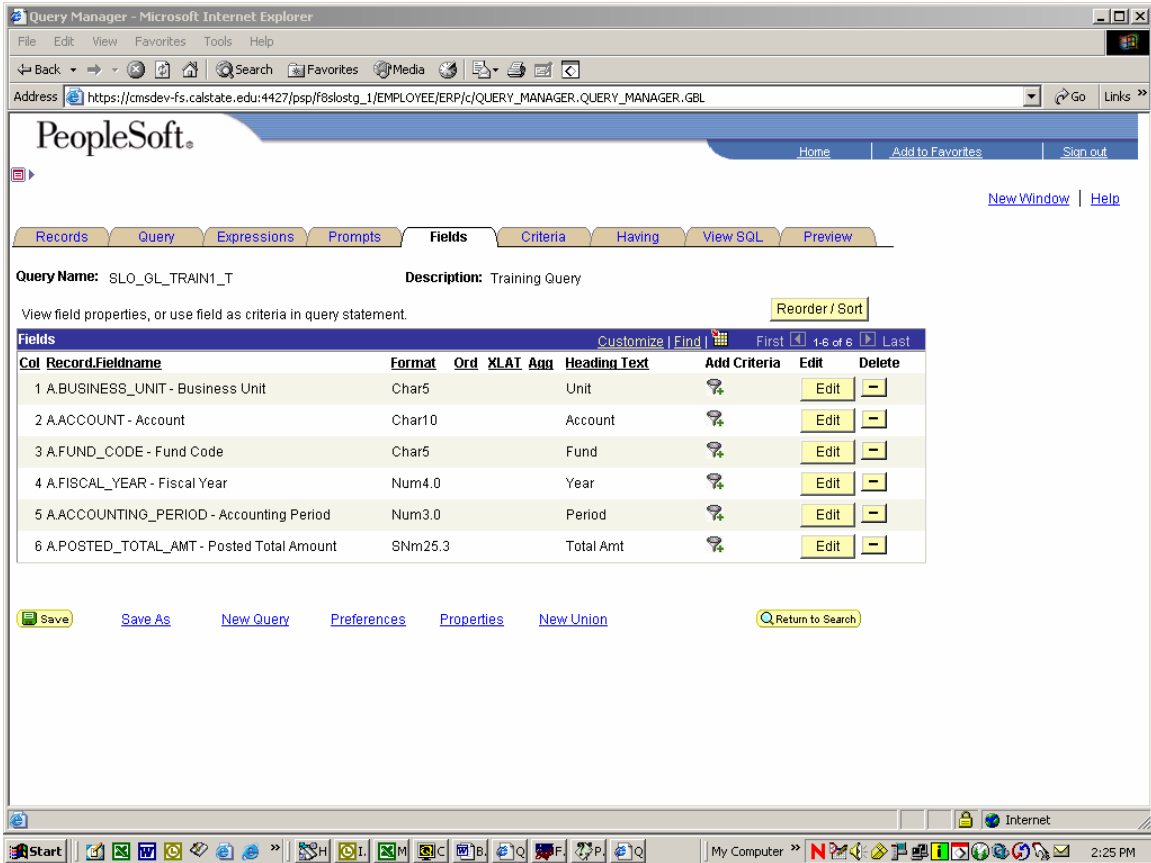
My Computer 2:21 PM

3.5 Modifying Headings

The text listed in the “Heading Text” column will be used for the headings in your query output to the grid control and Excel.

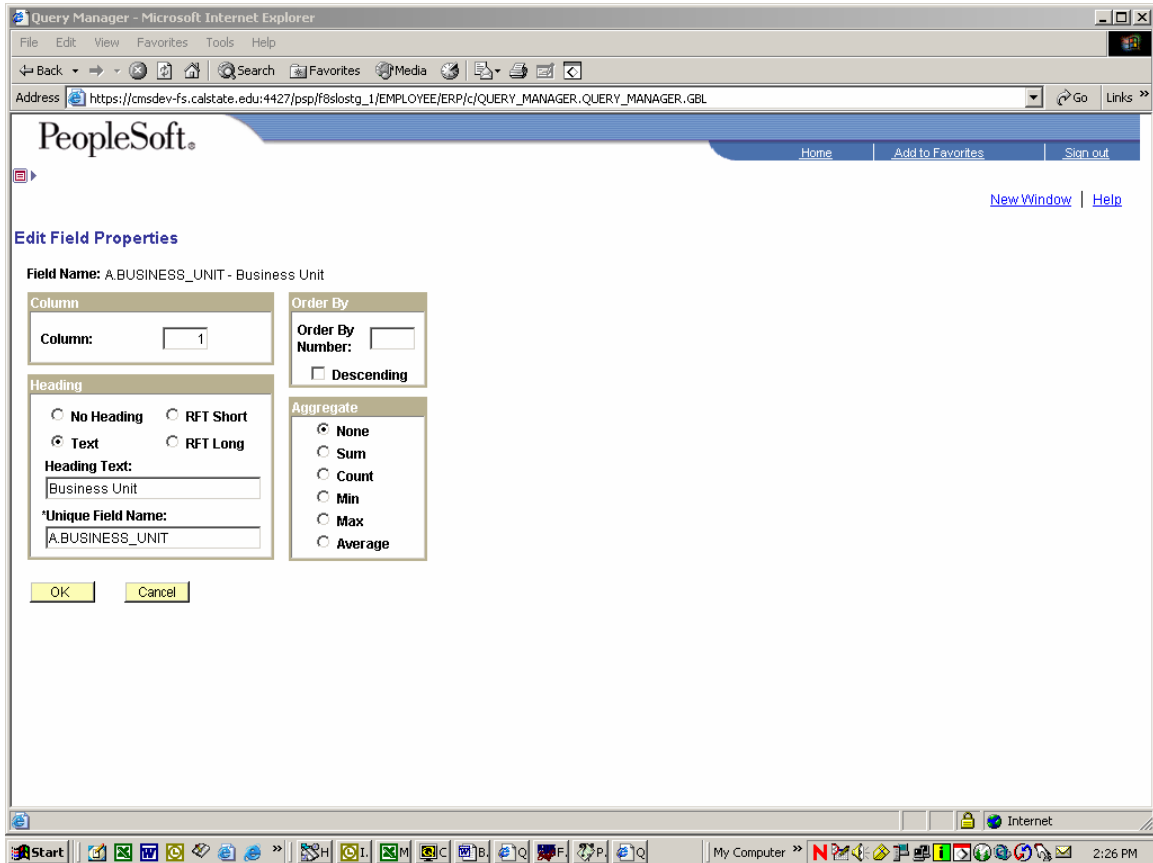
Let’s change the heading for UNIT to “Business Unit” and the heading for YEAR to “Fiscal Year”.

Press the **Edit** button on the field line you wish to change the heading for:



Navigation for modifying field headings:

- In the “Heading” group box, click on the “Text” radio button
- Select and click in the “Heading Text” field
- Type new heading text into the text box
- Press **OK** button



Save changes to query and rerun by selecting on the **Preview** tab, and then clicking on the **Rerun Query** hyperlink.

The modified headings are shown in the resultant output:

The screenshot shows the PeopleSoft Query Manager interface in a Microsoft Internet Explorer browser. The address bar displays the URL: https://cmsdev-fs.calstate.edu:4427/pspf8slostg_1/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MANAGER.GBL. The interface includes a navigation bar with tabs for Records, Query, Expressions, Prompts, Fields, Criteria, Having, View SQL, and Preview. The Preview tab is active. Below the tabs, there are links for View All, Rerun Query, and Download to Excel. A pagination control shows 'First 1-100 of 41968 Last'. The main content area displays a table with the following data:

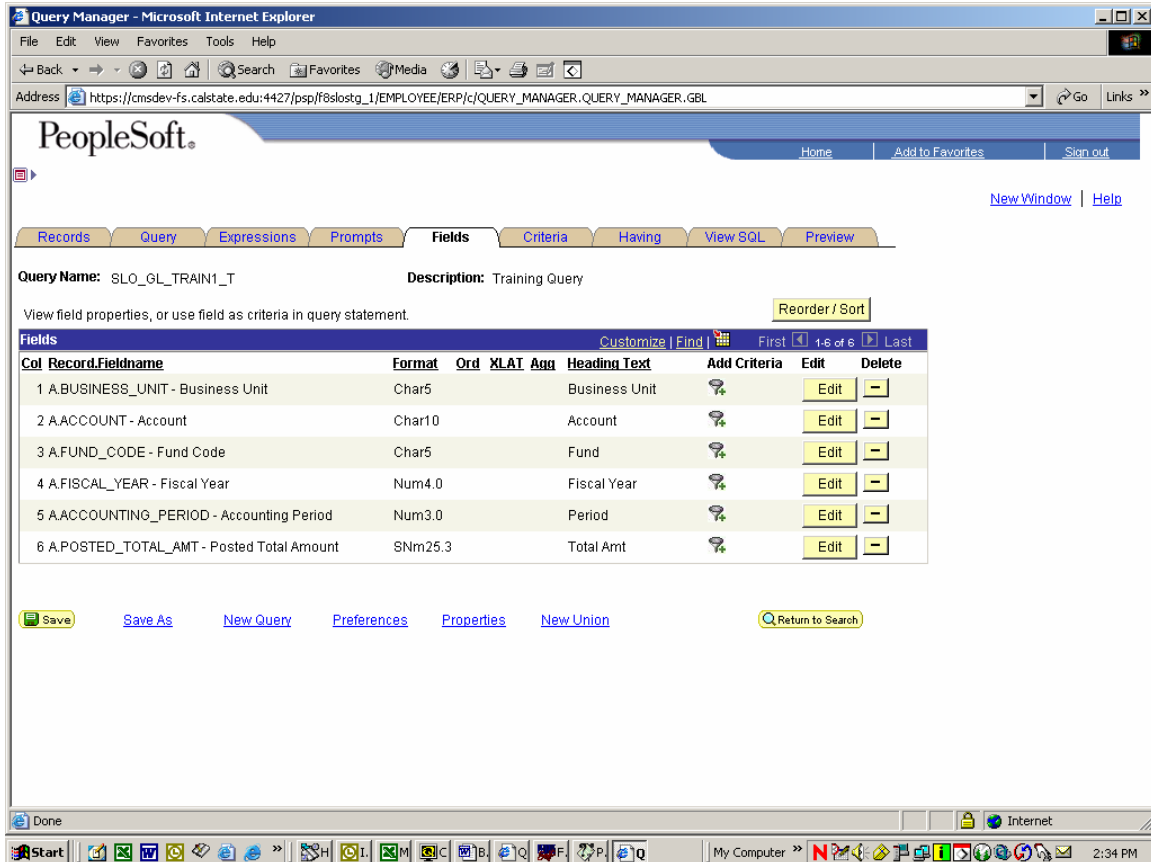
	Business Unit	Account	Fund	Fiscal Year	Period	Total Amt
1	SLCMP	101001	AD198	1999	12	191749.200
2	SLCMP	101001	AD199	1999	12	100475.280
3	SLCMP	101001	BF198	1999	12	-1178.860
4	SLCMP	101001	BF199	1999	12	553313.750
5	SLCMP	101001	CR198	1999	12	3337.520
6	SLCMP	101001	CR199	1999	12	219415.220
7	SLCMP	101001	FA001	1999	12	21009.610
8	SLCMP	101001	FC001	1999	12	35.500
9	SLCMP	101001	HA005	1999	12	133.990
10	SLCMP	101001	HA006	1999	12	210.000
11	SLCMP	101001	HAR01	1999	12	43514.390
12	SLCMP	101001	HAR03	1999	12	40062.000
13	SLCMP	101001	JB001	1999	12	58675.920
14	SLCMP	101001	JBR01	1999	12	40.000
15	SLCMP	101001	JC001	1999	12	26047.800
16	SLCMP	101001	JDR01	1999	12	936.600
17	SLCMP	101001	KA001	1999	12	31902.910
18	SLCMP	101001	MC001	1999	12	-17719.400
19	SLCMP	101001	MD003	1999	12	-26538.390

Activity #6 - Change the headings for UNIT and YEAR as indicated above.

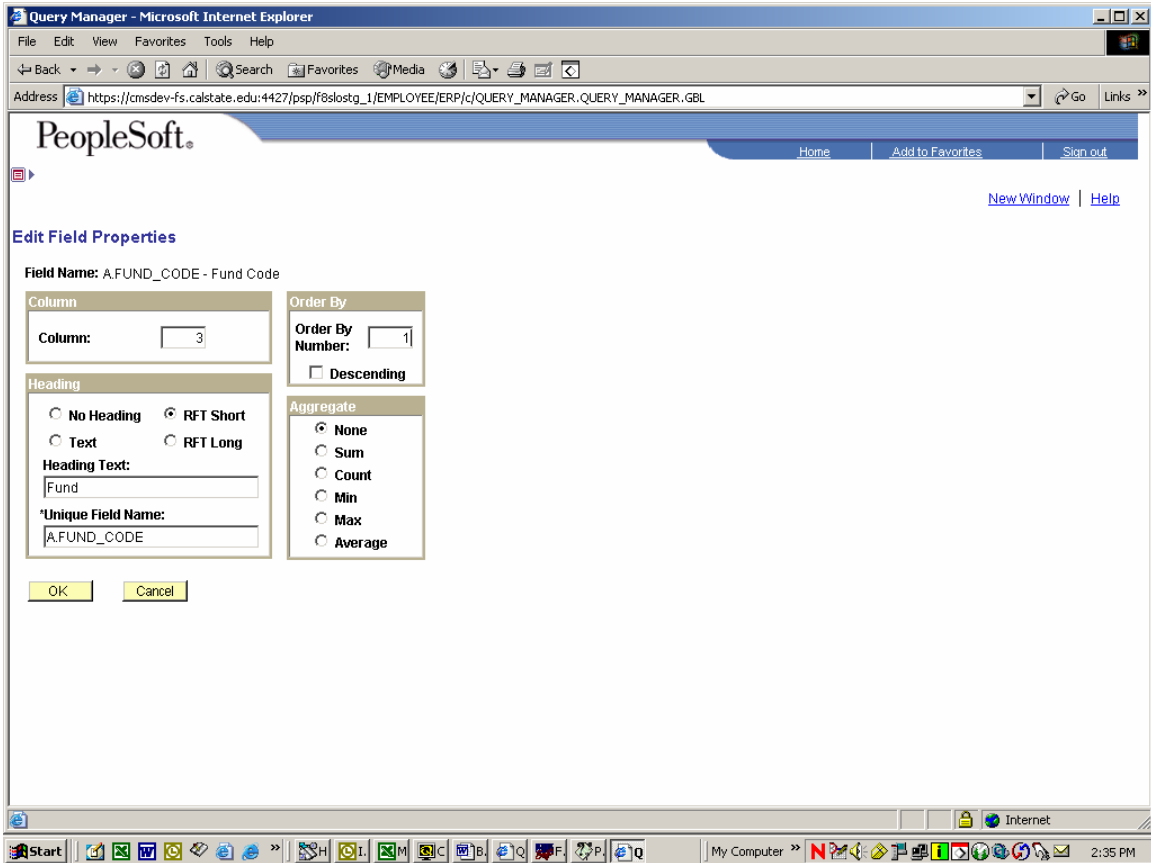
3.6 Sorting Query Output

The numbers in the “Ord” column represent which fields your query is using to sort the output. Unless you specify a specific sort order, the query will list the results in the order that the data is retrieved from the database.

Let’s sort the output by the FUND_CODE field. From the **Fields** page press the **Edit** button for the field to change sort order.



Specify sort order in the "Order By Number" field in "Order By" group box:



A "1" now displays in the "Ord" column for FUND_CODE. More than one field may be selected for sort criteria. For example, you could sort the query by ACCOUNT within FUND_CODE. When you select more than one field to sort by, the number displayed in the "Ord" column indicates the sequence in which the fields are used to sort the output. For now, we are putting this query in FUND_CODE sequence only.

NOTE: As the default, the system will sort the output in ascending order for the field. If you want to sort the output in descending order, from the Field Properties dialog box, click the "Descending" checkbox and it will sort the output in descending order (i.e. Z-A, 9-1, etc.) for that field. If you choose to sort the output in descending order, a 'D' will be displayed in the "Ord" column.

Save changes to query (optional) and rerun.

The modified sort order is shown in the resultant output:

The screenshot shows the PeopleSoft Query Manager interface. The table displays the following data:

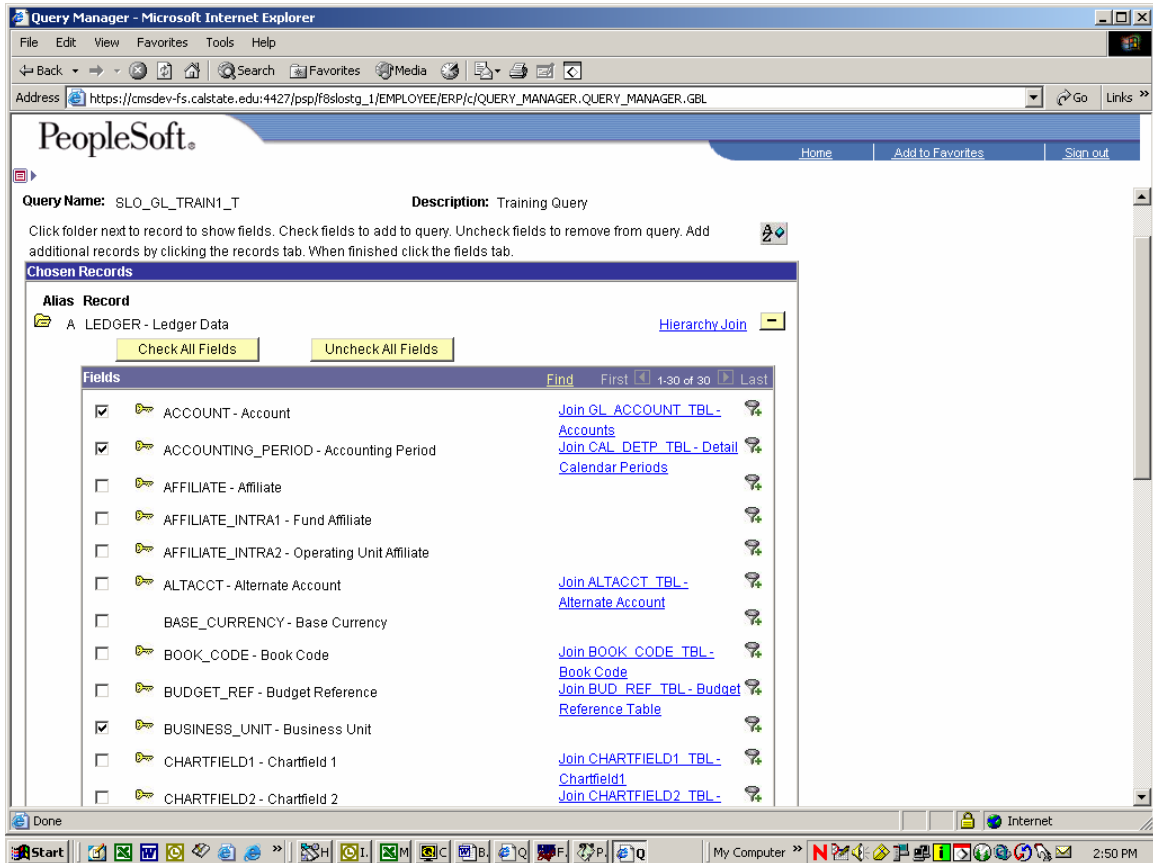
Ord	Business Unit	Account	Fund	Fiscal Year	Period	Total Amt
1	SLCMP	606002	AD196	1999	999	-2000.350
2	SLCMP	606002	AD196	1999	999	-9632.830
3	SLCMP	606002	AD196	1999	999	-3745.680
4	SLCMP	606002	AD196	1999	999	-810.280
5	SLCMP	606002	AD196	1999	999	-4960.880
6	SLCMP	606002	AD196	1999	999	-23999.270
7	SLCMP	606002	AD196	1999	999	-7437.420
8	SLCMP	606002	AD196	1999	999	-29574.170
9	SLCMP	606002	AD196	1999	999	-9962.450
10	SLCMP	202026	AD196	2001	4	-364.500
11	SLCMP	201001	AD196	2001	4	0.000
12	SLCMP	660003	AD196	2001	3	0.000
13	SLCMP	403002	AD196	2001	3	0.000
14	SLCMP	606002	AD196	1999	999	-1968.060
15	SLCMP	606002	AD196	1999	999	-16405.540
16	SLCMP	606002	AD196	1999	999	-10455.850
17	SLCMP	606002	AD196	1999	999	-1813.310
18	SLCMP	606002	AD196	1999	999	-25109.060
19	SLFRM	601303	AD196	1999	12	32454.990

Activity #7 - Sort the query by FUND_CODE in ascending order. Follow the above example as a guideline.

3.7 Adding Fields

In order to expand our account and fund query, let's add the Posted Base Currency Amount. By sorting the display of field names listed on the **Query** page in alphabetical order, it will be easy to find the new field for the query.

Press the **AZ** button to display field names in alphabetical order:



Now that the fields are sorted alphabetically, find the POSTED_BASE_AMT field and click the checkbox to select it.

Save changes to query (optional) and rerun.

The new field is shown in the resultant output:

The screenshot shows the PeopleSoft Query Manager interface in a Microsoft Internet Explorer browser. The address bar displays the URL: https://cmsdev-fs.calstate.edu:4427/psp/f8slostg_1/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MANAGER.GBL. The interface includes a navigation menu with tabs for Records, Query, Expressions, Prompts, Fields, Criteria, Having, View SQL, and Preview. Below the tabs, there are links for View All, Rerun Query, and Download to Excel. The main content area displays a table with 8 columns: Business Unit, Account, Fund, Fiscal Year, Period, Total Amt, and Amount. The table contains 19 rows of data, showing various financial transactions across different business units and fiscal years.

	Business Unit	Account	Fund	Fiscal Year	Period	Total Amt	Amount
1	SLFRM	202026	AD196	2001	4	-364.500	-364.500
2	SLFRM	305801	AD196	2001	4	364.500	364.500
3	SLFRM	660003	AD196	2001	4	0.000	0.000
4	SLCMP	202026	AD196	2001	12	364.500	364.500
5	SLCMP	305022	AD196	2001	12	-364.500	-364.500
6	SLCMP	305801	AD196	2001	12	-364.500	-364.500
7	SLFRM	305022	AD196	2001	12	155322935.050	155322935.050
8	SLCMP	403002	AD196	2001	999	0.000	0.000
9	SLCMP	403002	AD196	2001	999	0.000	0.000
10	SLFRM	305022	AD196	2001	12	-155322935.050	-155322935.050
11	SLCMP	305022	AD196	2001	12	364.500	364.500
12	SLCMP	305022	AD196	2000	12	-155322935.050	-155322935.050
13	SLFRM	403002	AD196	2001	3	0.000	0.000
14	SLFRM	660003	AD196	2001	3	0.000	0.000
15	SLFRM	202026	AD196	2002	0	-364.500	-364.500
16	SLFRM	202026	AD196	2002	0	364.500	364.500
17	SLFRM	305022	AD196	2002	0	364.500	364.500
18	SLFRM	660003	AD196	2001	999	0.000	0.000
19	SLFRM	305022	AD196	2002	0	-364.500	-364.500

Activity #8 - Add the field POSTED_BASE_AMT to your query. Follow the above example as a guideline.

3.8 Changing Column Order

Often it is necessary to rearrange the order in which the columns display to achieve the desired output. To change the column order, follow the steps below.

Navigation options for changing the column order:

- Press the **Edit** button to go to the **Edit Field Properties** page
- Specify new column number in “Column” group box

OR

- Press the **Reorder/Sort** button

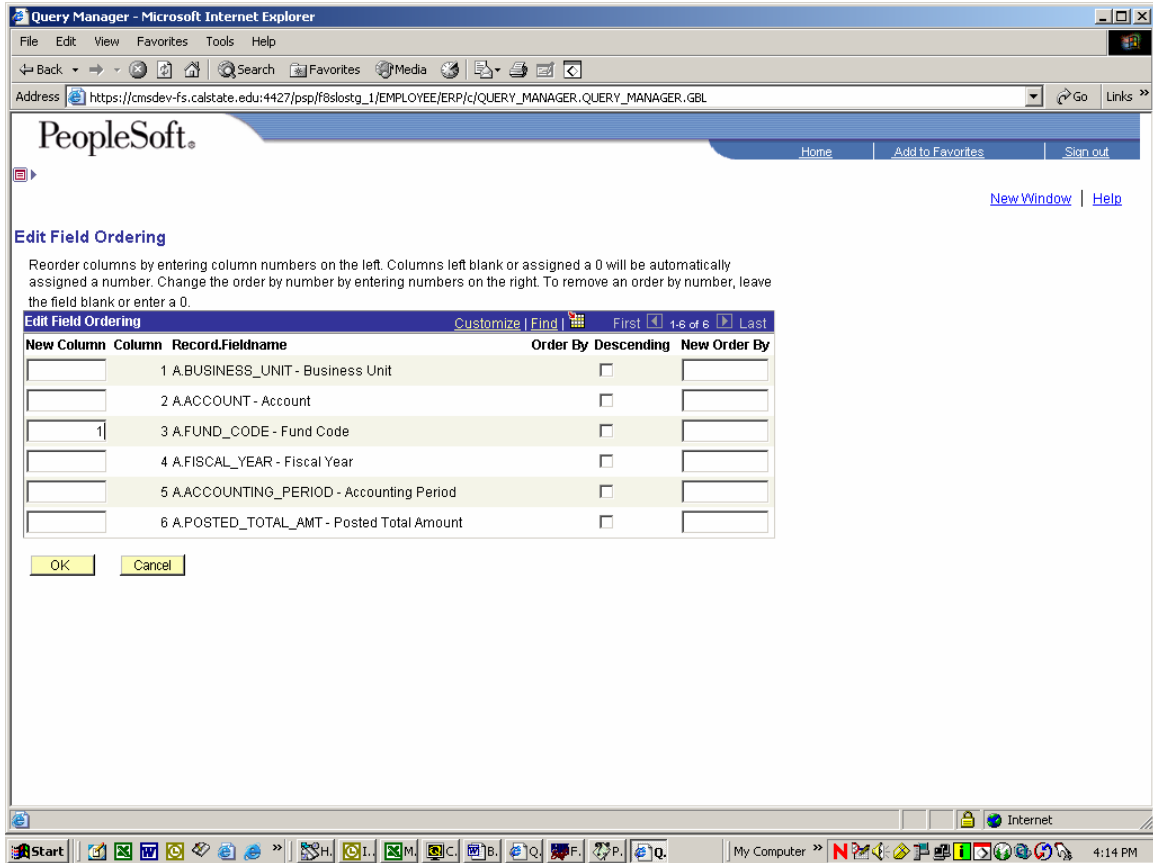
Query Name: SLO_GL_TRAIN1_T Description: Training Query

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				Unit		Edit	-
2	A.	ACCOUNT - Account	Char10				Account		Edit	-
3	A.	FUND_CODE - Fund Code	Char5				Fund		Edit	-
4	A.	FISCAL_YEAR - Fiscal Year	Num4.0				Year		Edit	-
5	A.	ACCOUNTING_PERIOD - Accounting Period	Num3.0				Period		Edit	-
6	A.	POSTED_TOTAL_AMT - Posted Total Amount	SNm25.3				Total Amt		Edit	-

[Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [New Union](#) [Return to Search](#)

Specify new column sequence numbers in the “New Column” fields, and specify FUND_CODE to be displayed in column 1:



Click “OK” to save the new column order and return to the Field page.

Save changes to query (optional) and rerun.

Notice that the "Fund" is now located in column 1:

The screenshot shows the PeopleSoft Query Manager interface in a Microsoft Internet Explorer browser. The address bar displays the URL: https://cmsdev-fs.calstate.edu:4427/pspf8slostg_1/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MANAGER.GBL. The interface includes a navigation menu with options like Home, Add to Favorites, and Sign out. Below the menu, there are tabs for Records, Query, Expressions, Prompts, Fields, Criteria, Having, View SQL, and Preview. The Preview tab is active, showing a table of data. The table has columns for Fund, Business Unit, Account, Fiscal Year, Period, and Total Amt. The data is sorted by Total Amt in descending order. The table contains 19 rows of data.

	Fund	Business Unit	Account	Fiscal Year	Period	Total Amt
1	AD198	SLCMP	101001	1999	12	191749.200
2	AD199	SLCMP	101001	1999	12	100475.280
3	BF198	SLCMP	101001	1999	12	-1178.860
4	BF199	SLCMP	101001	1999	12	553313.750
5	CR198	SLCMP	101001	1999	12	3337.520
6	CR199	SLCMP	101001	1999	12	219415.220
7	FA001	SLCMP	101001	1999	12	21009.610
8	FC001	SLCMP	101001	1999	12	35.500
9	HA005	SLCMP	101001	1999	12	133.990
10	HA006	SLCMP	101001	1999	12	210.000
11	HAR01	SLCMP	101001	1999	12	43514.390
12	HAR03	SLCMP	101001	1999	12	40062.000
13	JB001	SLCMP	101001	1999	12	58675.920
14	JBR01	SLCMP	101001	1999	12	40.000
15	JC001	SLCMP	101001	1999	12	26047.800
16	JDR01	SLCMP	101001	1999	12	936.600
17	KA001	SLCMP	101001	1999	12	31902.910
18	MC001	SLCMP	101001	1999	12	-17719.400
19	MD003	SLCMP	101001	1999	12	-26538.390

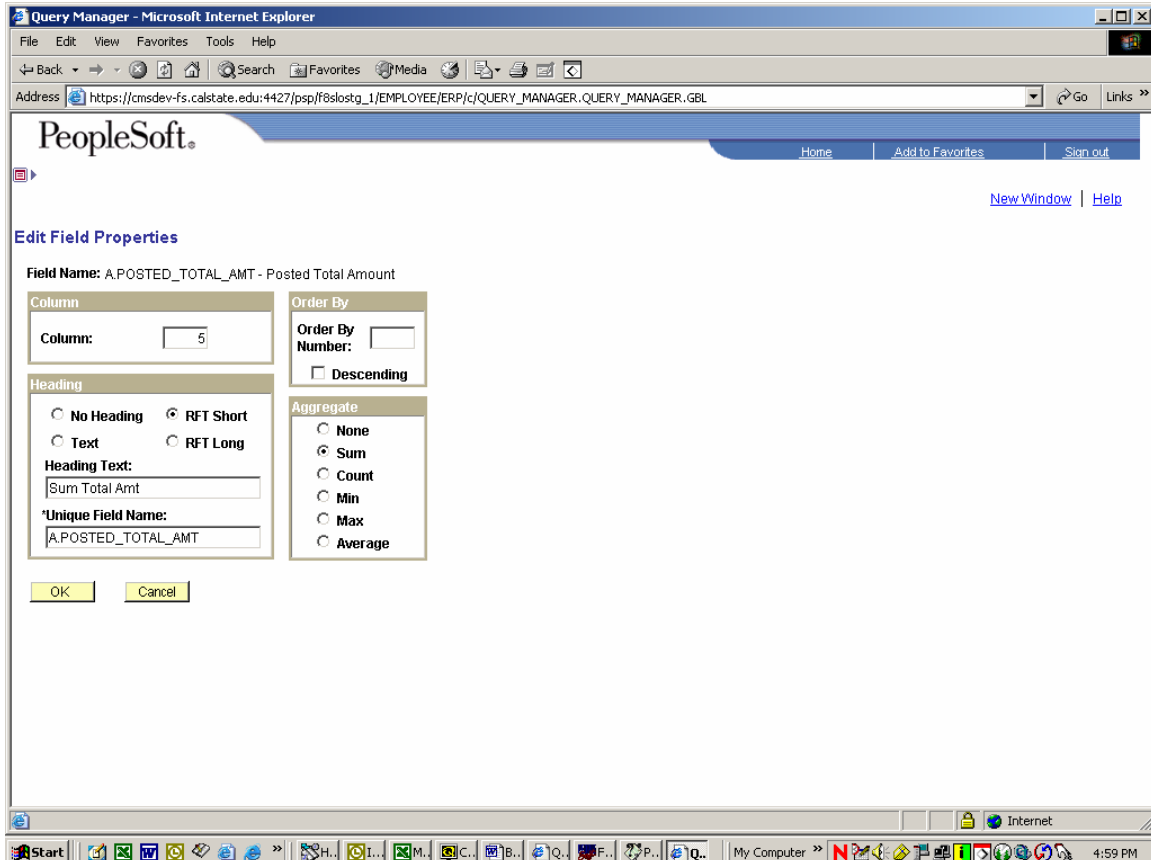
Activity #9 - Change the column order of the account/fund list, so that the fields are displayed in the following order: Fund, Business Unit, Account, Fiscal Year, Period, Total Amount. Follow the above example as a guideline.

3.9 Aggregate Functions

An aggregate function allows the user to perform various predefined summary options such as counting and averaging.

To establish an aggregate function, press the **Edit** button next to the field to which you are going to apply the aggregate. This will take you to the **Edit Field Properties** page.

Select the radio button in the “Aggregate” group box for the aggregate function you wish to apply:



NOTE: In order to undo an aggregate function, follow the instructions above and choose the radio button labeled “None”.

Additional information for using the Aggregate Functions will be provided in later sections of this guide.

SECTION 4

Using Selection Criteria

OVERVIEW

In this lesson you will learn how to specify selection criteria in a query. Selection criteria is used to restrict the rows selected from the database when the query is executed. In addition, you will learn how to create run-time prompts.

OBJECTIVES

By the end of this section, you will be able to:

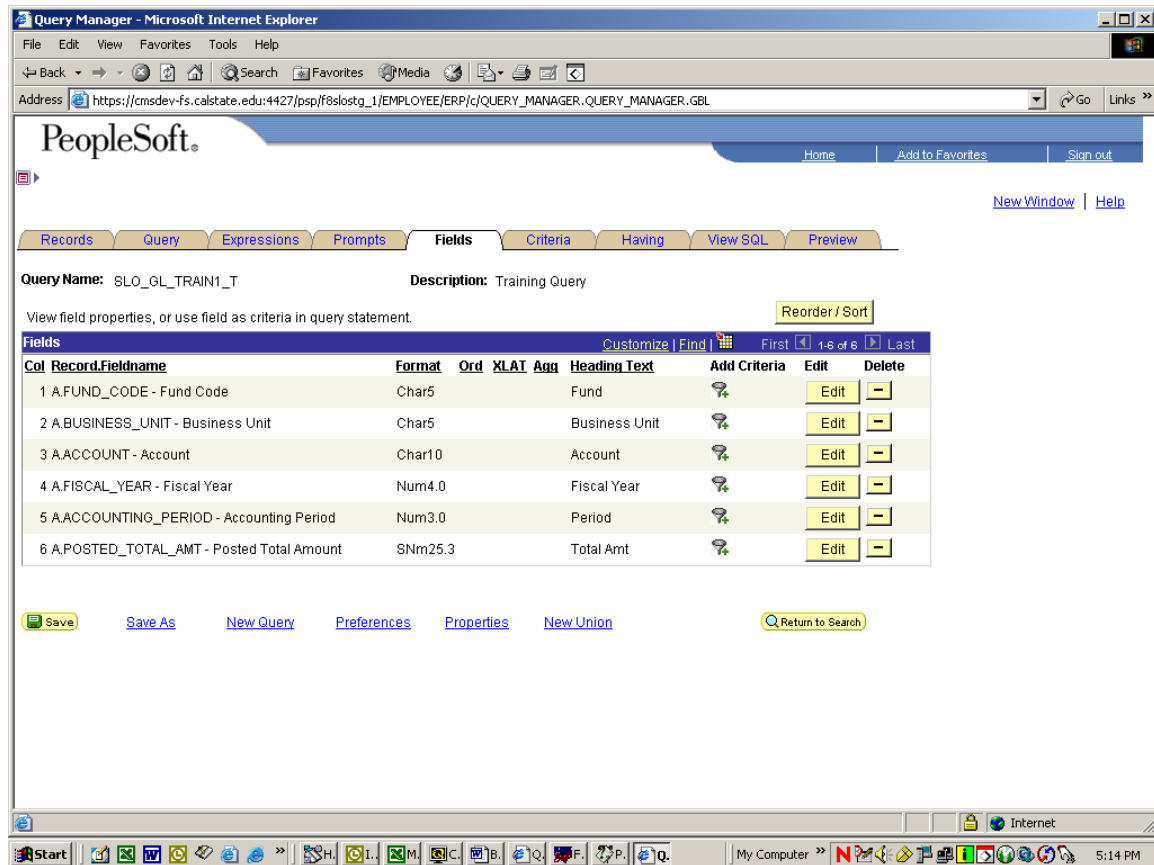
- Create selection criteria
- Create run-time prompts

4.1 Adding Selection Criteria

Criteria are used to select only specific rows of data from the database. Criteria can be established from both the **Fields** and the **Criteria** pages.

Using our account/fund list as an example, you may want to create a listing of the accounts and funds only for the current fiscal year. The query we created in the previous section gives us all fiscal years. Let's now add selection criteria to the query.

Open the SLO_GL_TRAIN1_T query if it is not already open:



The screenshot shows the PeopleSoft Query Manager interface in a Microsoft Internet Explorer browser window. The address bar shows the URL: https://cmsdev-fs.calstate.edu:4427/psp/f8slostg_1/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MANAGER.GBL. The page title is "PeopleSoft." and the user is logged in as "Home". The navigation menu includes "Home", "Add to Favorites", and "Sign out". The main navigation tabs are "Records", "Query", "Expressions", "Prompts", "Fields", "Criteria", "Having", "View SQL", and "Preview". The "Fields" tab is currently selected.

Query Name: SLO_GL_TRAIN1_T Description: Training Query

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.FUND_CODE - Fund Code	Char5				Fund		Edit	-
2	A.BUSINESS_UNIT - Business Unit	Char5				Business Unit		Edit	-
3	A.ACCOUNT - Account	Char10				Account		Edit	-
4	A.FISCAL_YEAR - Fiscal Year	Num4.0				Fiscal Year		Edit	-
5	A.ACCOUNTING_PERIOD - Accounting Period	Num3.0				Period		Edit	-
6	A.POSTED_TOTAL_AMT - Posted Total Amount	SNm25.3				Total Amt		Edit	-

Buttons: [Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [New Union](#) [Return to Search](#)

Then navigate to the Criteria page by selecting the tab.

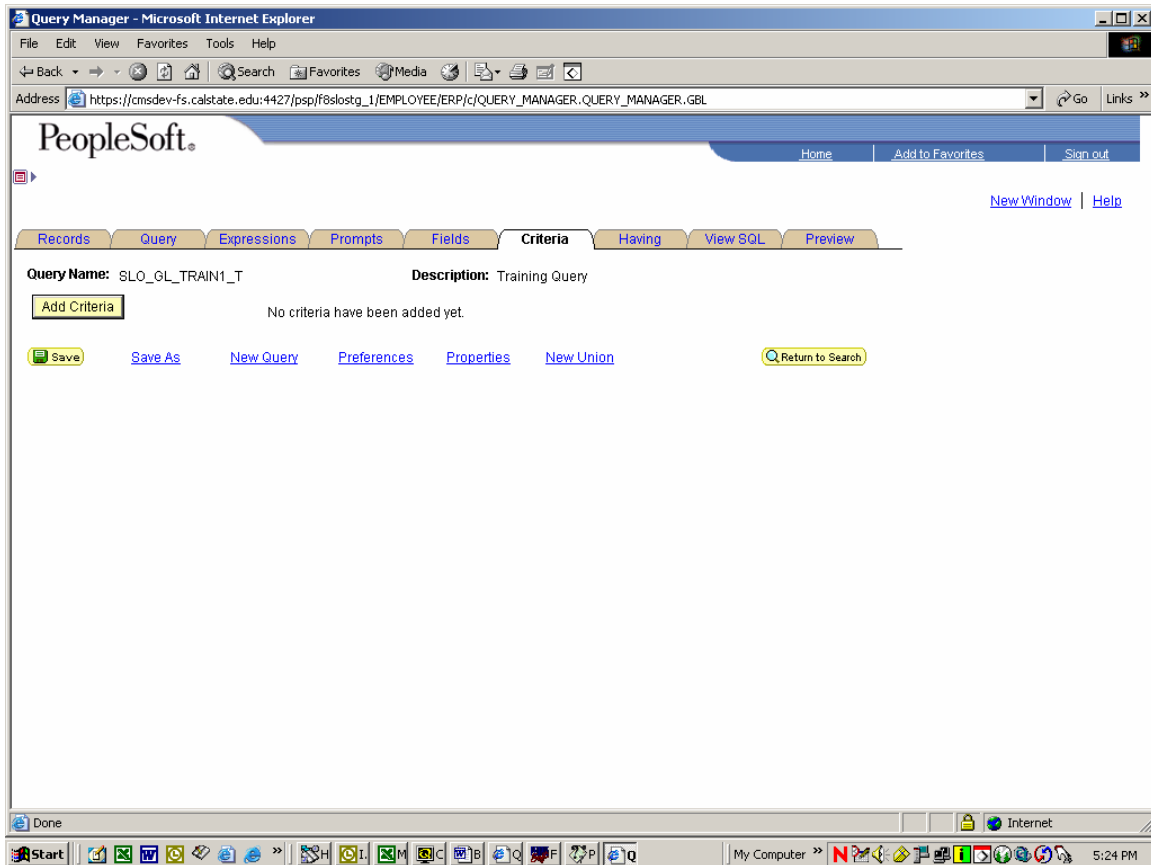
There are a couple of different ways to add criteria to a query.

- Click on the “funnel-plus” button in the “Add Criteria” column for the individual field for which you want to add a criterion
- Go to the **Criteria** page and press the **Add Criteria** button

Both of these approaches will take you to the **Edit Criteria Properties** page.

Using the first method will auto-populate some fields for you (such as the Record and Field), and is generally easier to follow. But, since the second method is more comprehensive we will show that route here:

Navigating to the **Criteria** page we see:



At this point, no criteria have been specified yet. Occasionally you will notice that some criteria have been automatically specified for you—this is often the case when you are using a table that is effective dated.

4.2 Criteria Components

The **Criteria** page together with the **Edit Criteria Properties** page, allow you to define criteria expressions to selectively retrieve information.

The following columns are present on the **Criteria** page (**Expression 1, Condition Type, and Expression 2** are also present on the **Edit Criteria Properties** page):

Component	Definition
Logical	Contains the Boolean operator that represents how the criteria rows are evaluated. Blank for the first criteria, subsequent rows default to AND but can be changed to OR.
Expression 1	Used to specify what you are comparing.
Condition Type	State how your Expression 1 is to be compared with your Expression 2.
Expression 2	You can compare the Expression 1 to a constant, a field from another record, an expression, a subquery, or values entered using a run-time prompt.

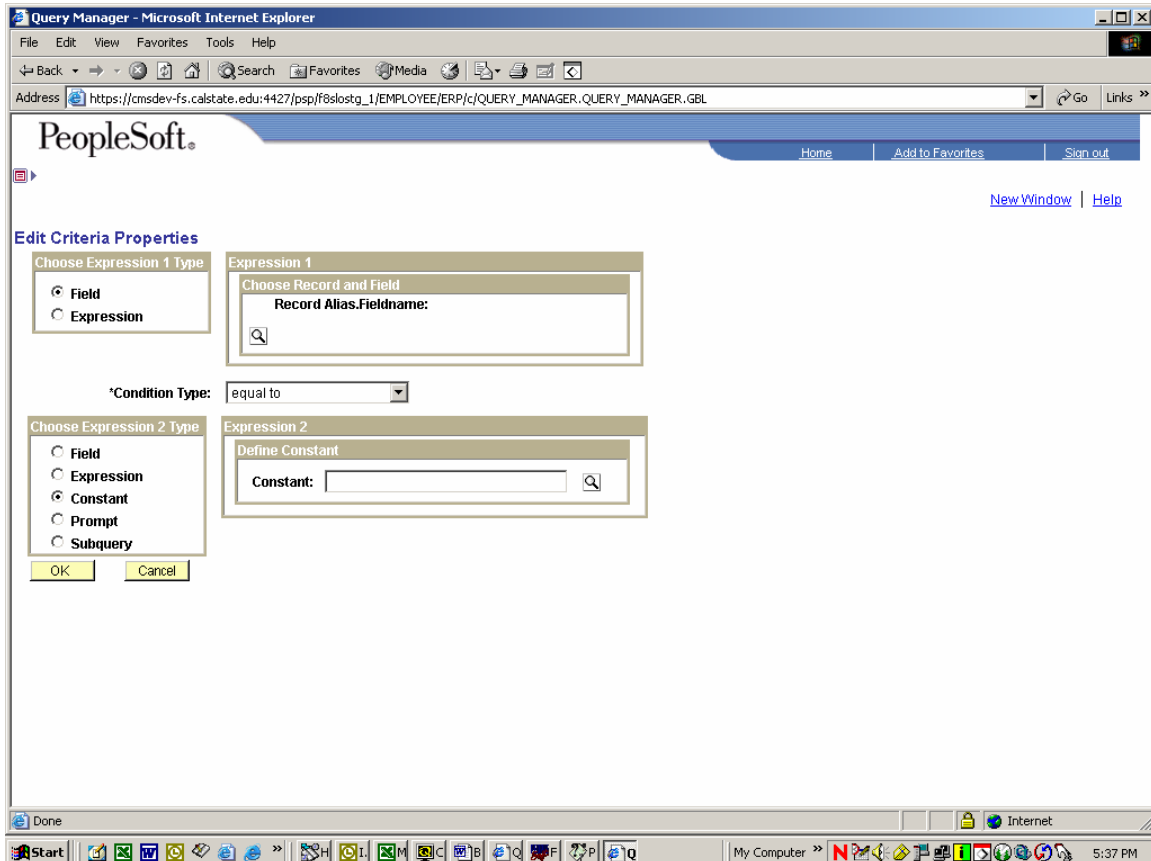
The buttons on the page are used to manipulate query criteria.

Button	Definition
Add Criteria	Add Criteria
Delete	Remove existing criteria
Edit	Edit existing criteria
Group Criteria	Add or remove parentheses

4.3 Entering Criteria

To enter criteria for the FISCAL_YEAR field, perform the following steps:

Press the **Add Criteria** button. This will take you to the **Edit Criteria Properties** page (you could also click on the Funnel+ symbol on the FISCAL_YEAR line which would take you to the same page, and automatically populate the Record Alias.Fieldname in Expression 1):

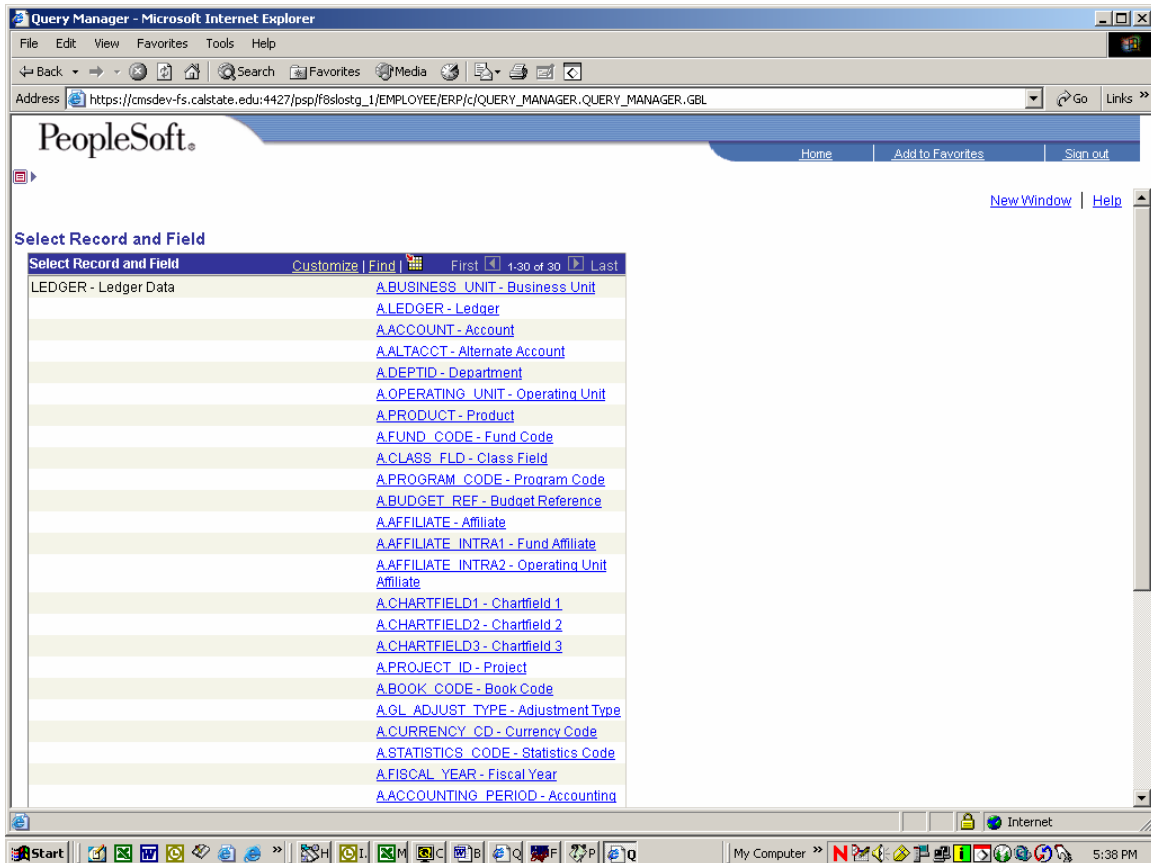


Let's add criteria to our query to select the current fiscal year.

Confirm the following:

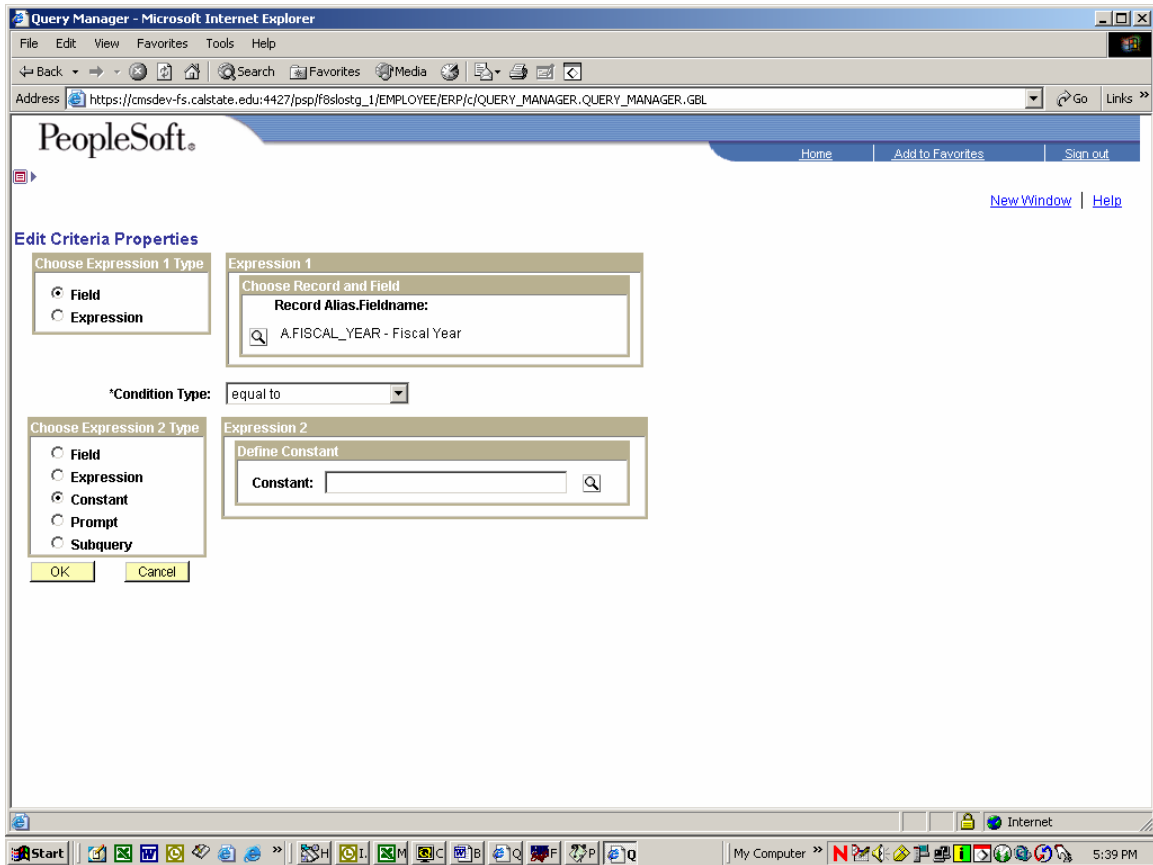
- The "Field" radio button is selected in the "Choose Expression 1 Type" group box
- The Condition Type is set to "equal to"
- The "Constant" radio button is selected in the "Choose Expression 2 Type" group box

Press the magnifying glass icon in the “Choose Record and Field” group box within the “Expression 1” group box to bring up the **Select Record and Field** page:



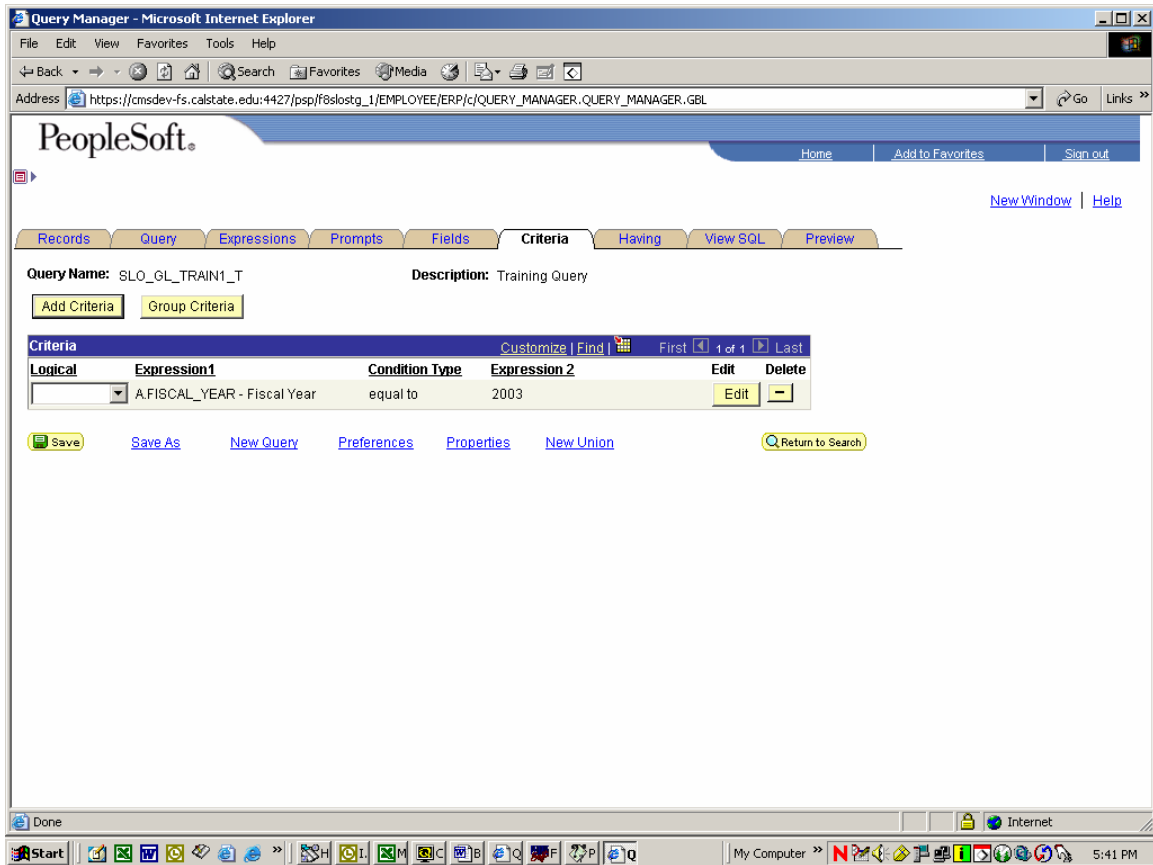
Scroll down and click on the **A.FISCAL_YEAR – Fiscal Year** hyperlink

You will be taken back to the **Edit Criteria Properties** page:



Enter the fiscal year you want to restrict the information to (for example, 2003) in the “Constant field” within the “Define Constant” group box within the “Expression 2” group box.

Press the **OK** button and you will be back on the **Criteria** page:



Resave the query and run:

The screenshot shows the PeopleSoft Query Manager interface in a Microsoft Internet Explorer browser. The address bar displays the URL: https://cmsdev-fs.calstate.edu:4427/psp/f8slstg_1/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MANAGER.GBL. The interface includes a navigation menu with tabs for Records, Query, Expressions, Prompts, Fields, Criteria, Having, View SQL, and Preview. Below the tabs, there are links for View All, Rerun Query, and Download to Excel. A pagination control shows 'First 1-100 of 41968 Last'. The main content area displays a table with the following columns: Fund, Business Unit, Account, Fiscal Year, Period, and Total Amt. The table contains 19 rows of data, all for the fiscal year 2003, sorted by Fund in ascending order.

	Fund	Business Unit	Account	Fiscal Year	Period	Total Amt
1	AD196	SLCMP	305022	2003	0	364.500
2	AD196	SLCMP	305022	2003	0	-364.500
3	AD196	SLCMP	305801	2003	0	-364.500
4	AD196	SLCMP	305801	2003	0	364.500
5	AD196	SLFRM	202026	2003	0	-364.500
6	AD196	SLFRM	305022	2003	0	364.500
7	AD196	SLFRM	202026	2003	0	364.500
8	AD196	SLFRM	305022	2003	0	-364.500
9	AD196	SLFRM	305801	2003	0	-364.500
10	AD196	SLFRM	305801	2003	0	364.500
11	AD196	SLCMP	202026	2003	0	-364.500
12	AD196	SLCMP	202026	2003	0	364.500
13	AD197	SLFRM	305022	2003	0	160151634.080
14	AD197	SLFRM	305022	2003	0	-160151634.080
15	AD197	SLCMP	305022	2003	0	160151634.080
16	AD197	SLCMP	305022	2003	0	-160151634.080
17	AD198	SLCMP	305022	2003	0	165420664.580
18	AD198	SLCMP	202027	2003	0	8700.000
19	AD198	SLCMP	202027	2003	0	-8700.000

NOTE: Notice that the output displays only rows with a Fiscal Year equal to 2003. In addition, the output is sorted by Fund in ascending order.

Wildcards are also available in queries. The wildcard within PeopleSoft is %. For example, F% will find any records beginning with a F, %F will find any records that end in an F.

Activity #10 - Add the criteria for FISCAL_YEAR 2003 in your query. Follow the above example as a guideline.

4.4 Condition Type/Expression Combinations

Each Condition Type uses specific expressions for the “Expression 2” group box.

Condition Type	Expression 2
equal to not equal to greater than not greater than less than not less than	constant field expression subquery prompt
in list not in list	list subquery
between not between	constant-constant constant-field constant-expression field-constant field-field field-expression expression- constant expression-field expression-expression
like not like	constant prompt
exists not exists	subquery
is null is not null	
in tree not in tree	tree option

NOTE: If you forget which expressions are associated with each condition type, after you select which condition type you are using to define the criteria, the available options for that condition type will appear in the “Choose Expression 2 Type” group box.

4.5 Compound Selection Criteria

Often you will have to create a query that requires multiple selection criteria against one or more fields. When you have multiple conditions, you must use one of the Boolean operators to relate one criterion to another.

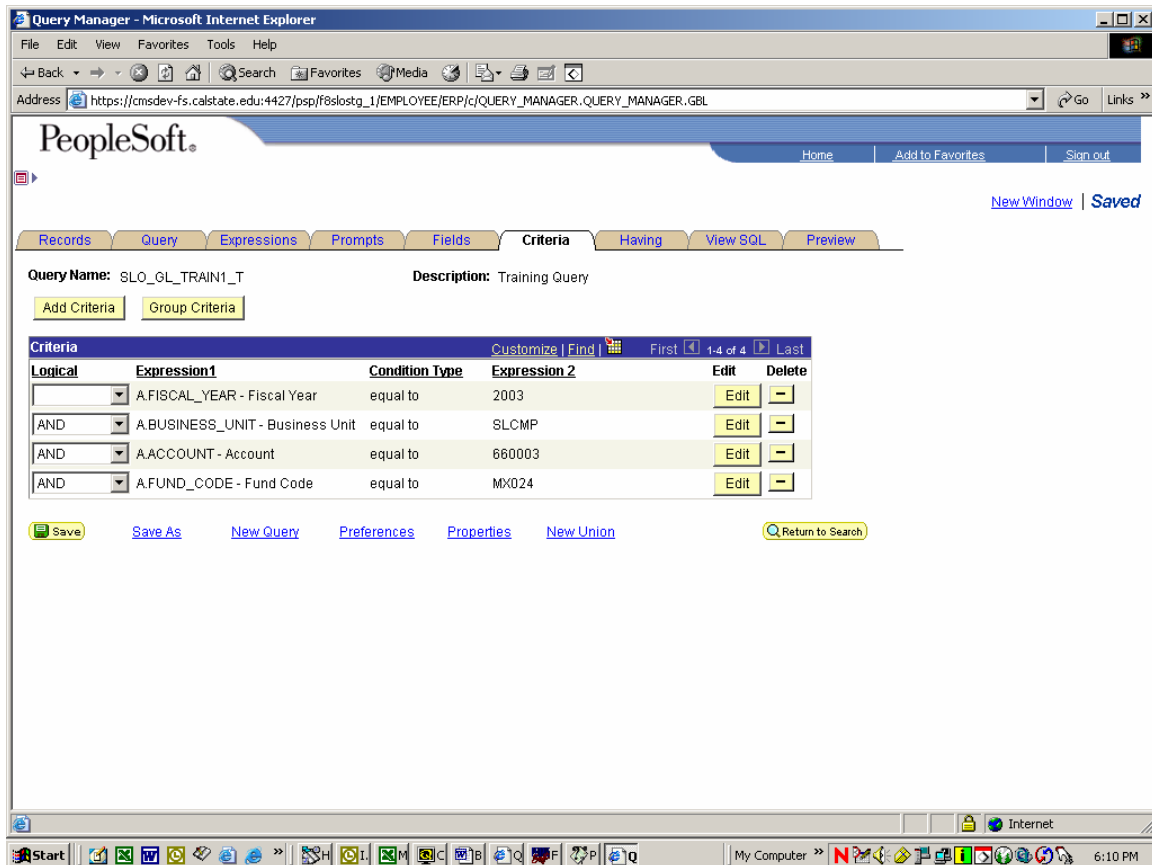
The operators available on the **Criteria** page are AND, OR, NOT, and parentheses. The operators AND, OR, and NOT are used to show the relationship of one criteria row to another. Parentheses are used to further define the relationship and define the order in which the criteria is evaluated. If you do not use parentheses, the criteria is evaluated in the order listed.

Let's add criteria to qualify on BUSINESS_UNIT, ACCOUNT, and FUND_CODE in our query.

- From the **Fields** page, press the "Add Criteria" icon on the BUSINESS_UNIT line.
- Enter "SLCMP" into the "Constant" field within the "Define Constant" group box within the "Expression 2" group box.
- Press the **OK** button.

Repeat the same steps for the ACCOUNT field and the FUND_CODE field using the constants of "660003" and "MX024", respectively. Remember that when defining constants you can use the look-up function (magnifying glass) to see the available constant fields.

Now our criteria looks like:



The screenshot shows the PeopleSoft Query Manager interface in Microsoft Internet Explorer. The browser address bar shows the URL: https://cmsdev-fs.calstate.edu:4427/psp/f8slostg_1/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MANAGER.GBL. The page title is "PeopleSoft." and the breadcrumb navigation includes "Home", "Add to Favorites", and "Sign out". The main navigation tabs are "Records", "Query", "Expressions", "Prompts", "Fields", "Criteria", "Having", "View SQL", and "Preview". The "Criteria" tab is active, showing the query name "SLO_GL_TRAIN1_T" and description "Training Query". Below the query name are buttons for "Add Criteria" and "Group Criteria". The criteria table is as follows:

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.FISCAL_YEAR - Fiscal Year	equal to	2003	Edit	-
AND	A.BUSINESS_UNIT - Business Unit	equal to	SLCMP	Edit	-
AND	A.ACCOUNT - Account	equal to	660003	Edit	-
AND	A.FUND_CODE - Fund Code	equal to	MX024	Edit	-

At the bottom of the criteria table are buttons for "Save", "Save As", "New Query", "Preferences", "Properties", "New Union", and "Return to Search". The Windows taskbar at the bottom shows the Start button, several application icons, and the system tray with the time 6:10 PM.

Resave the query and rerun:

The screenshot shows the PeopleSoft Query Manager interface in a Microsoft Internet Explorer browser. The address bar displays the URL: https://cmsdev-fs.calstate.edu:4427/psp/f8slostg_1/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MANAGER.GBL. The interface includes a navigation menu with tabs for Records, Query, Expressions, Prompts, Fields, Criteria, Having, View SQL, and Preview. Below the navigation menu, there are links for View All, Rerun Query, and Download to Excel. A table displays the query results, showing 6 records. The table has columns for Fund, Business Unit, Account, Fiscal Year, Period, and Total Amt. The data is as follows:

	Fund	Business Unit	Account	Fiscal Year	Period	Total Amt
1	MX024	SLCMP	660003	2003	1	0.000
2	MX024	SLCMP	660003	2003	2	70110.660
3	MX024	SLCMP	660003	2003	3	675.070
4	MX024	SLCMP	660003	2003	4	46.080
5	MX024	SLCMP	660003	2003	5	83.580
6	MX024	SLCMP	660003	2003	998	0.000

NOTE: Notice that the output now only displays information for Fund MX024 in Business Unit SLCMP for Account 660003 in the 2003 Fiscal Year.

Activity #11 - Add the criteria for BUSINESS-UNIT, ACCOUNT, and FUND_CODE to your query. Follow the above example as a guideline.

4.6 Boolean Operators

When you need to use multiple fields or the same field more than once for selection criteria, the operators of OR, NOT or parentheses may also have to be selected.

If you wanted to see the same information presented above for fund MX024, but did not want to include any information related to BUSINESS_UNIT "SLCMP", then follow these steps:

From the **Criteria** page, on the BUSINESS_UNIT line, change the value in the "Logical" drop-down list from AND to AND NOT:

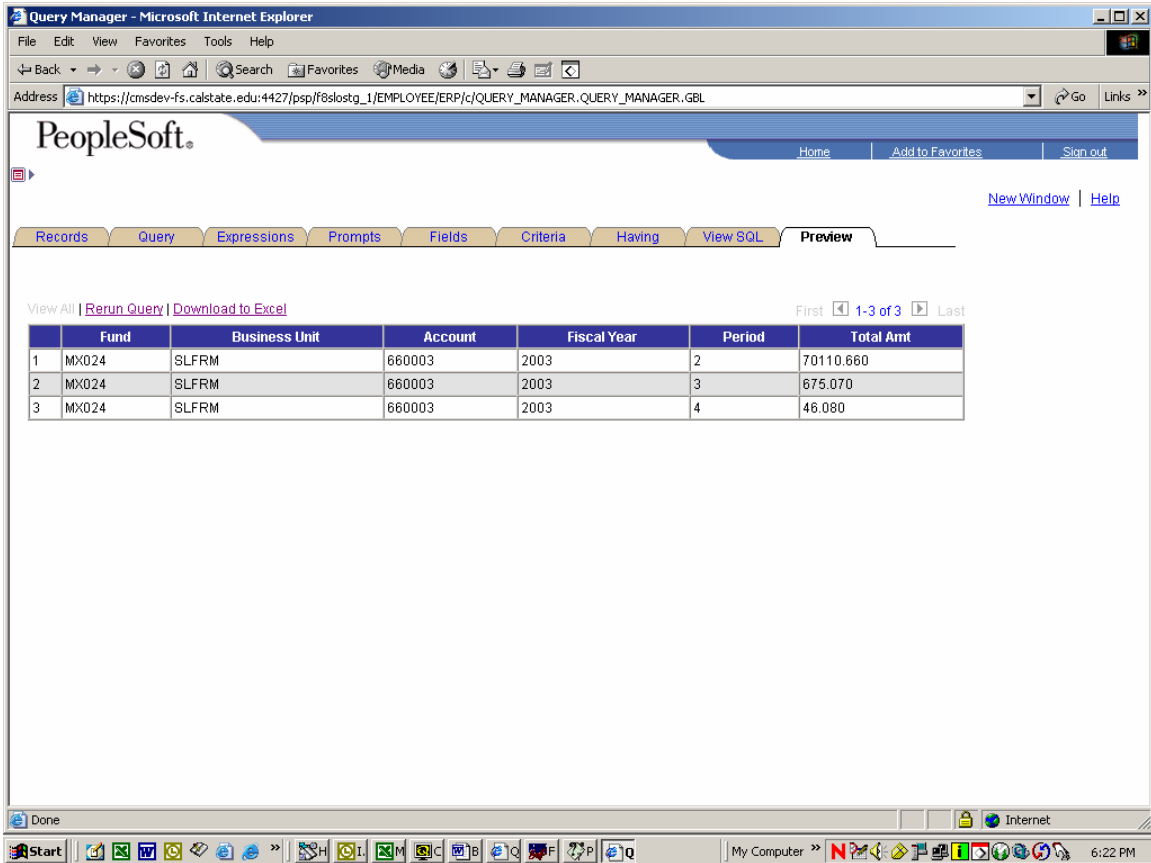
Query Name: SLO_GL_TRAIN1_T Description: Training Query

[Add Criteria](#) [Group Criteria](#)

Logical	Expression 1	Condition Type	Expression 2	Edit	Delete
	A.FISCAL_YEAR - Fiscal Year	equal to	2003	Edit	-
AND NOT	A.BUSINESS_UNIT - Business Unit	equal to	SLCMP	Edit	-
AND	A.ACCOUNT - Account	equal to	660003	Edit	-
AND NOT	A.FUND_CODE - Fund Code	equal to	MX024	Edit	-

[Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [New Union](#) [Return to Search](#)

Rerun the query (don't save this time):



NOTE: Notice that the output now only displays the information related to Business Unit SLFRM (which is the only other unit besides SLCMP in this case).

Now let's modify the query to total the amounts in this account/fund for Business Unit SLCMP up through the end of period 3.

- From the **Criteria** page, on the BUSINESS_UNIT line, change the value in the "Logical" drop-down list back to "AND" from "AND NOT"
- From the **Fields** page, press the "Add Criteria" icon on the ACCOUNTING_PERIOD line
- Change the **Condition Type** to "Less than" and enter "4" in the "Define Constant" group box within the "Expression 2" group box. In this way the query will only return information prior to period 4 (i.e. periods 0 – 3).
- Press the **OK** button
- You will be returned to the **Field** page. Click on the edit button for POSTED_TOTAL_AMT and choose the Aggregate function of "Sum".
- Press the **OK** button

Our criteria now looks like:

The screenshot shows the PeopleSoft Query Manager interface in a Microsoft Internet Explorer browser window. The address bar shows the URL: https://cmsdev-fs.calstate.edu:4427/pspf8slostg_1/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MANAGER.GBL. The page title is "Query Manager - Microsoft Internet Explorer".

The interface displays the "Criteria" tab for a query named "SLO_GL_TRAIN1_T" with the description "Training Query". Below the query name are buttons for "Add Criteria" and "Group Criteria".

The main area contains a table of criteria:

Logical	Expression 1	Condition Type	Expression 2	Edit	Delete
	A.FISCAL_YEAR - Fiscal Year	equal to	2003	Edit	-
AND	A.BUSINESS_UNIT - Business Unit	equal to	SLCMP	Edit	-
AND	A.ACCOUNT - Account	equal to	660003	Edit	-
AND	A.FUND_CODE - Fund Code	equal to	MX024	Edit	-
AND	A.ACCOUNTING_PERIOD - Accounting Period	less than	4	Edit	-

Below the table are buttons for "Save", "Save As", "New Query", "Preferences", "Properties", "New Union", and "Return to Search".

The Windows taskbar at the bottom shows the Start button, several application icons, and the system tray with the time 6:36 PM.

And our Fields page now looks like:

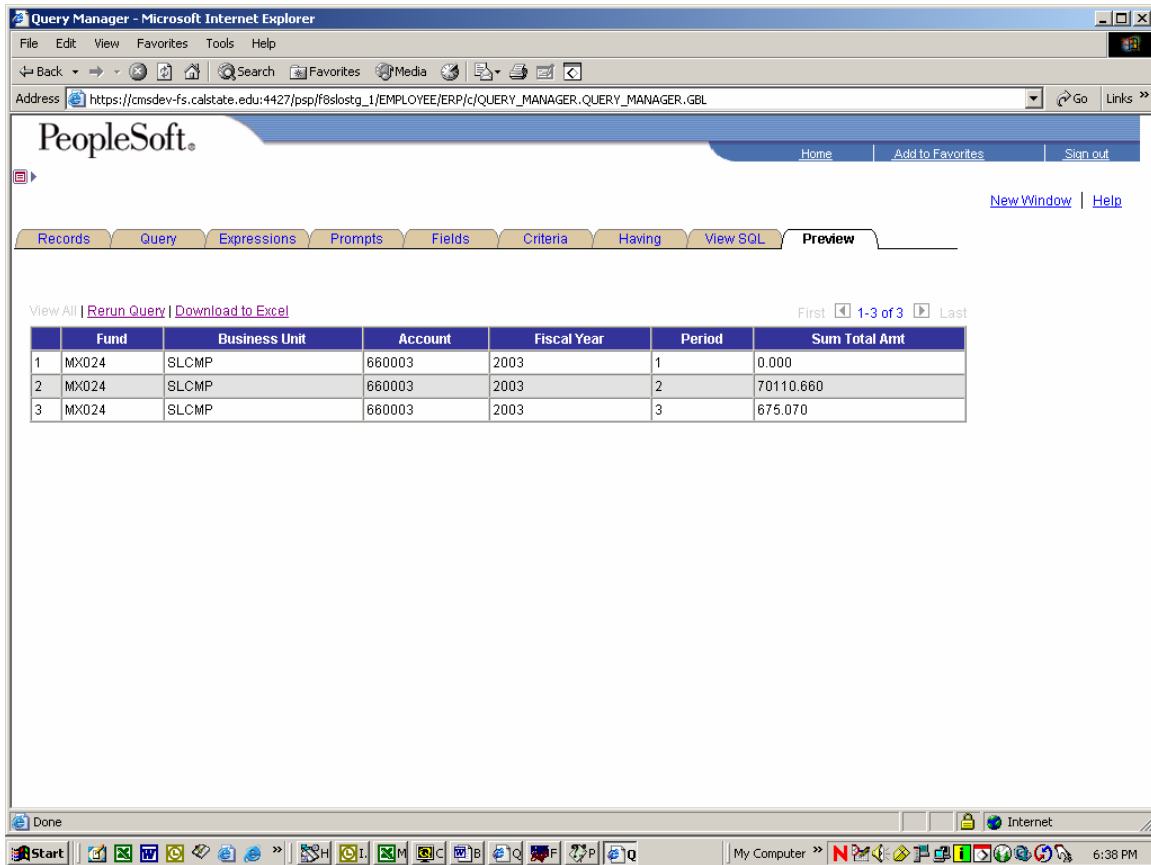
Query Name: SLO_GL_TRAIN1_T Description: Training Query

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.FUND_CODE - Fund Code		Char5	1			Fund		Edit	-
2	A.BUSINESS_UNIT - Business Unit		Char5				Business Unit		Edit	-
3	A.ACCOUNT - Account		Char10				Account		Edit	-
4	A.FISCAL_YEAR - Fiscal Year		Num4.0				Fiscal Year		Edit	-
5	A.ACCOUNTING_PERIOD - Accounting Period		Num3.0				Period		Edit	-
6	A.POSTED_TOTAL_AMT - Posted Total Amount		SNm25.3			Sum	Sum Total Amt		Edit	-

[Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [New Union](#) [Return to Search](#)

If we run the query at this point, you will notice that the aggregate function does not appear to have worked (all three periods are listed separately):



The screenshot shows the PeopleSoft Query Manager interface in Microsoft Internet Explorer. The browser address bar displays the URL: https://cmsdev-fs.calstate.edu:4427/psp/f8slostg_1/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MANAGER.GBL. The interface includes a navigation menu with tabs for Records, Query, Expressions, Prompts, Fields, Criteria, Having, View SQL, and Preview. The Preview tab is active, displaying a table with the following data:

	Fund	Business Unit	Account	Fiscal Year	Period	Sum Total Amt
1	MX024	SLCMP	660003	2003	1	0.000
2	MX024	SLCMP	660003	2003	2	70110.660
3	MX024	SLCMP	660003	2003	3	675.070

The reason for this is that the column labeled "Period" constrains the Aggregate Function to provide summary information only to the extent of each individual period listed here. In order to summarize all periods, the "Period" column must be removed.

- On the Fields page, click the "-" button to remove the ACCOUNTING_PERIOD field so that it does not show up in the results table. Note that this does NOT remove the criteria which we have set up for the ACCOUNTING_PERIOD field.

Save and rerun the query. The results should look as follows:

The screenshot shows the PeopleSoft Query Manager interface in a Microsoft Internet Explorer browser. The browser's address bar displays the URL: https://cmsdev-fs.calstate.edu:4427/pspf8slostg_1/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MANAGER.GBL. The PeopleSoft logo is visible at the top left, and navigation links for Home, Add to Favorites, and Sign out are at the top right. Below the logo, there are tabs for Records, Query, Expressions, Prompts, Fields, Criteria, Having, View SQL, and Preview. The Preview tab is currently selected. Below the tabs, there are links for View All, Rerun Query, and Download to Excel. On the right side, there are navigation controls for First, 1-1 of 1, and Last. The main content area displays a table with the following data:

	Fund	Business Unit	Account	Fiscal Year	Sum Total Amt
1	MX024	SLCMP	660003	2003	70785.730

The browser's status bar at the bottom shows "Done" and "Internet". The Windows taskbar at the very bottom includes the Start button, several application icons, and the system tray showing "My Computer" and the time "6:43 PM".

4.7 Removing Criteria

Let's remove the criteria row for the accounting period. In order to accomplish this, follow the steps listed below:

- On the **Criteria** page, press the "Delete" button ("-") on the ACCOUNTING_PERIOD line

The **Criteria** page will now look as follows:

The screenshot shows the PeopleSoft Query Manager interface. The browser title is "Query Manager - Microsoft Internet Explorer". The address bar shows the URL: https://cmsdev-fs.calstate.edu:4427/psp/f8slostg_1/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MANAGER.GBL. The page header includes the PeopleSoft logo and navigation links: Home, Add to Favorites, Sign out, New Window, and Help. The main navigation tabs are: Records, Query, Expressions, Prompts, Fields, Criteria (selected), Having, View SQL, and Preview. The query name is "SLQ_GL_TRAIN1_T" and the description is "Training Query". There are buttons for "Add Criteria" and "Group Criteria". The criteria table is as follows:

Logical	Expression 1	Condition Type	Expression 2	Edit	Delete
	A.FISCAL_YEAR - Fiscal Year	equal to	2003	Edit	-
AND	A.BUSINESS_UNIT - Business Unit	equal to	SLCMP	Edit	-
AND	A.ACCOUNT - Account	equal to	660003	Edit	-
AND	A.FUND_CODE - Fund Code	equal to	MX024	Edit	-

Below the table are buttons for Save, Save As, New Query, Preferences, Properties, New Union, and Return to Search.

Activity #12 - Remove the criteria for ACCOUNTING_PERIOD. Follow the above example as a guideline.

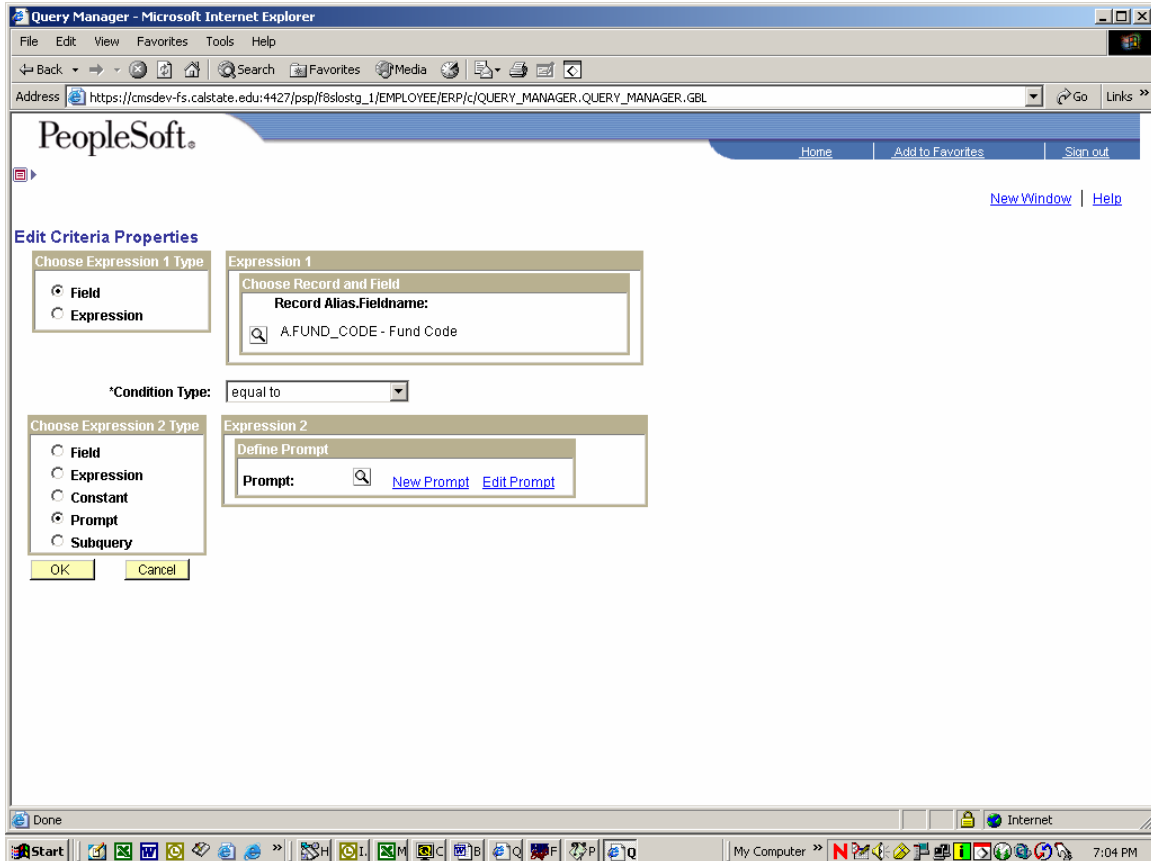
4.8 Run-time Prompts

There are times when you may want to use a different value for a field each time the query is run. An example of this might be a query where you have to specify different funds each time. A run-time prompt allows you to enter a value for a specific field at the time the query is executed. This eliminates the necessity of having many different queries that are virtually the same except for one or more variables.

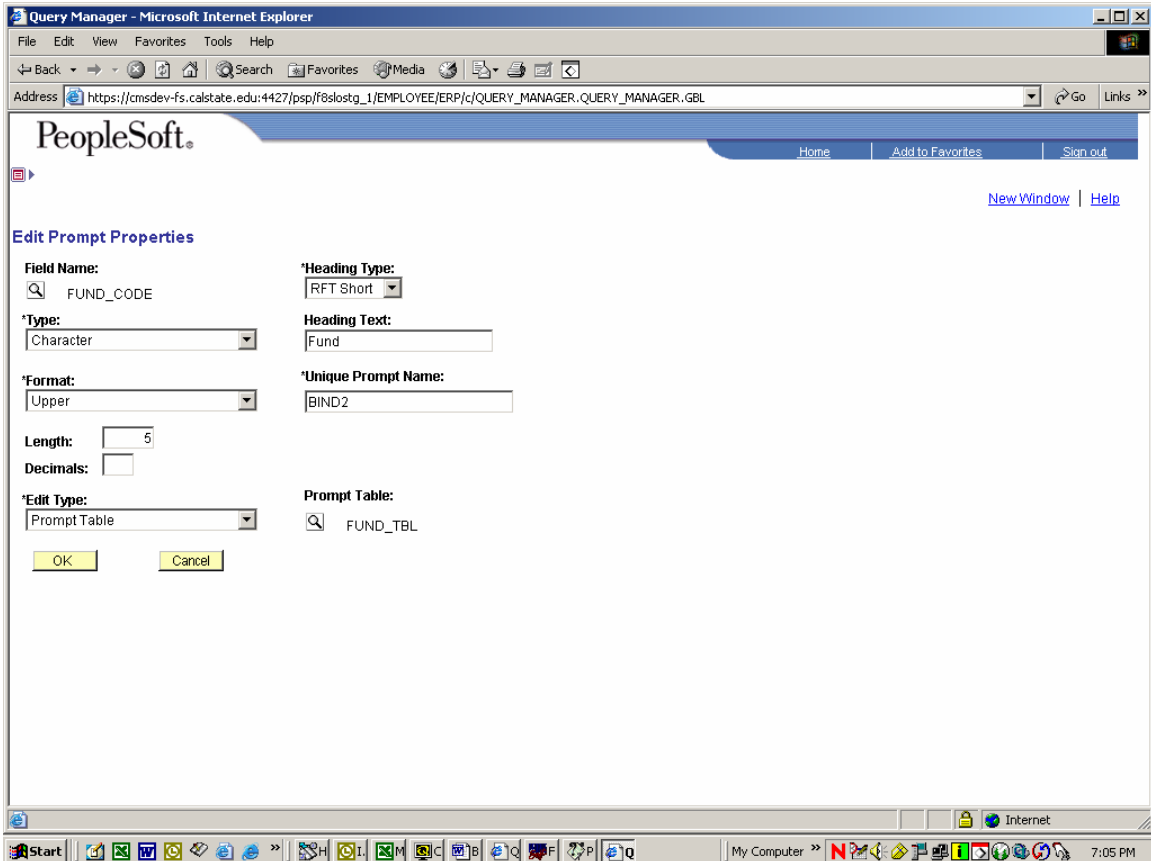
Run-time prompts are available for all expression types except *is null* and *in tree*, as well as their negative counterparts. You can have multiple prompts in a query.

Let's establish a run-time prompt on the FUND_CODE field.

- From the **Criteria** page
- Press the **Edit** button for FUND_CODE
- Select the "Prompt" radio button in the "Choose Expression 2" group box:

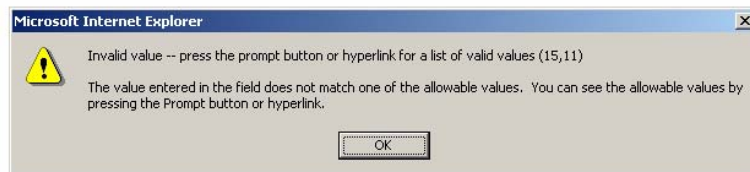
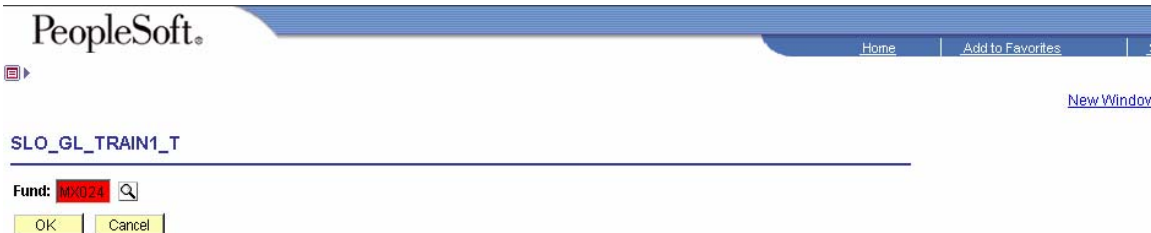


- Click on the **New Prompt** hyperlink in the "Define Prompt" group box within the "Expression 2" group box:



Notice that the **Edit Type** dialogue box defaults to Prompt Table. This selection will only work if your prompt field is a “key” in the table that you are querying. You may want to accept this default and try your prompt since it is a simple process to edit the prompt properties if the field is not a “key” and you receive a warning message.

If the prompt is not a “key” in the table you are querying, you will receive the following warning message:



In order to correct the prompt, click **OK**, click on the **Cancel** button, click the criteria tab and edit the field you are prompting for. In the **Define Prompt** select the **Edit Prompt** hyperlink. Then in the **Edit Type** dropdown list, choose **No Table Edit**.

PeopleSoft. Home Add to Favorites Sign

[New Window](#)

Edit Prompt Properties

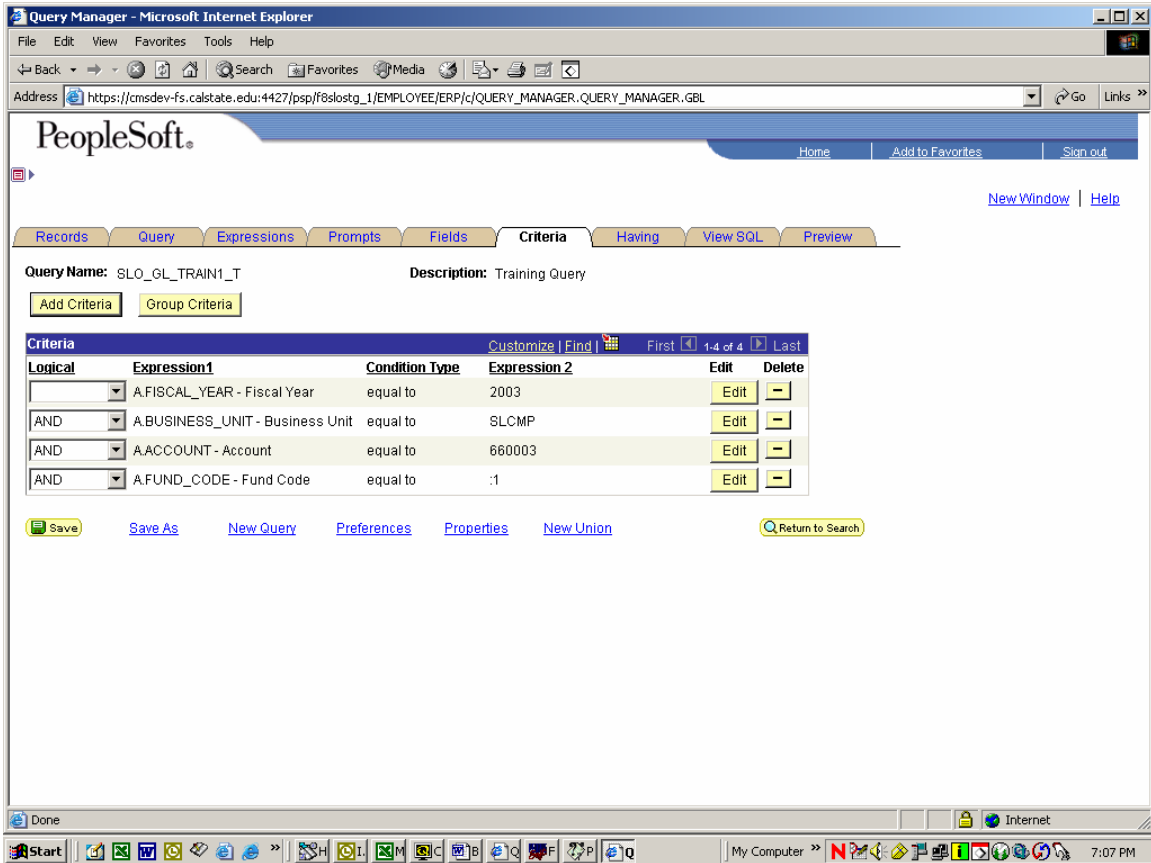
Field Name: FUND_CODE	*Heading Type: RFT Short
*Type: Character	Heading Text: Fund
*Format: Upper	*Unique Prompt Name: BIND1
Length: 5	
Decimals:	
*Edit Type: No Table Edit	Prompt Table: FUND_TBL

OK Cancel

- Click the **OK** button.

NOTE: If you would like to change the run-time prompt heading, then click on the “Heading Type” drop-down list and select “Text”. Then enter the new heading in the “Heading Text” text box.

- Then click **OK** again to save at Edit Criteria Properties level and return to the criteria page. (Your prompt should now accept your input now when you run your query; but, keep in mind that it will not perform a validation of your input.)



Resave the query and rerun.

Enter FUND_CODE to search for (MX024) and press the **View Results** button:

The screenshot shows the PeopleSoft Query Manager interface in a Microsoft Internet Explorer browser. The address bar displays the URL: https://cmsdev-fs.calstate.edu:4427/pspf8slostg_1/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MANAGER.GBL. The interface includes a navigation bar with tabs for Records, Query, Expressions, Prompts, Fields, Criteria, Having, View SQL, and Preview. Below the tabs, there are links for "View All", "Rerun Query", and "Download to Excel". The main content area displays a table with the following data:

	Fund	Business Unit	Account	Fiscal Year	Sum Total Amt
1	MX024	SLCMP	660003	2003	70915.390

The browser's status bar at the bottom shows "Done" and "Internet". The Windows taskbar at the very bottom displays the Start button, several application icons, and the system tray with the time 7:14 PM.

Activity #13 – Build a run-time prompt on the FUND_CODE field. Follow the above example as a guideline.

SECTION 5

Creating a Simple Join

OVERVIEW

In this lesson you will learn how to create a query utilizing a simple join between two tables. This technique is used when a query requires data that is not all contained in one place.

OBJECTIVES

By the end of this section, you will be able to:

- Create a query in which two tables are joined on common keys

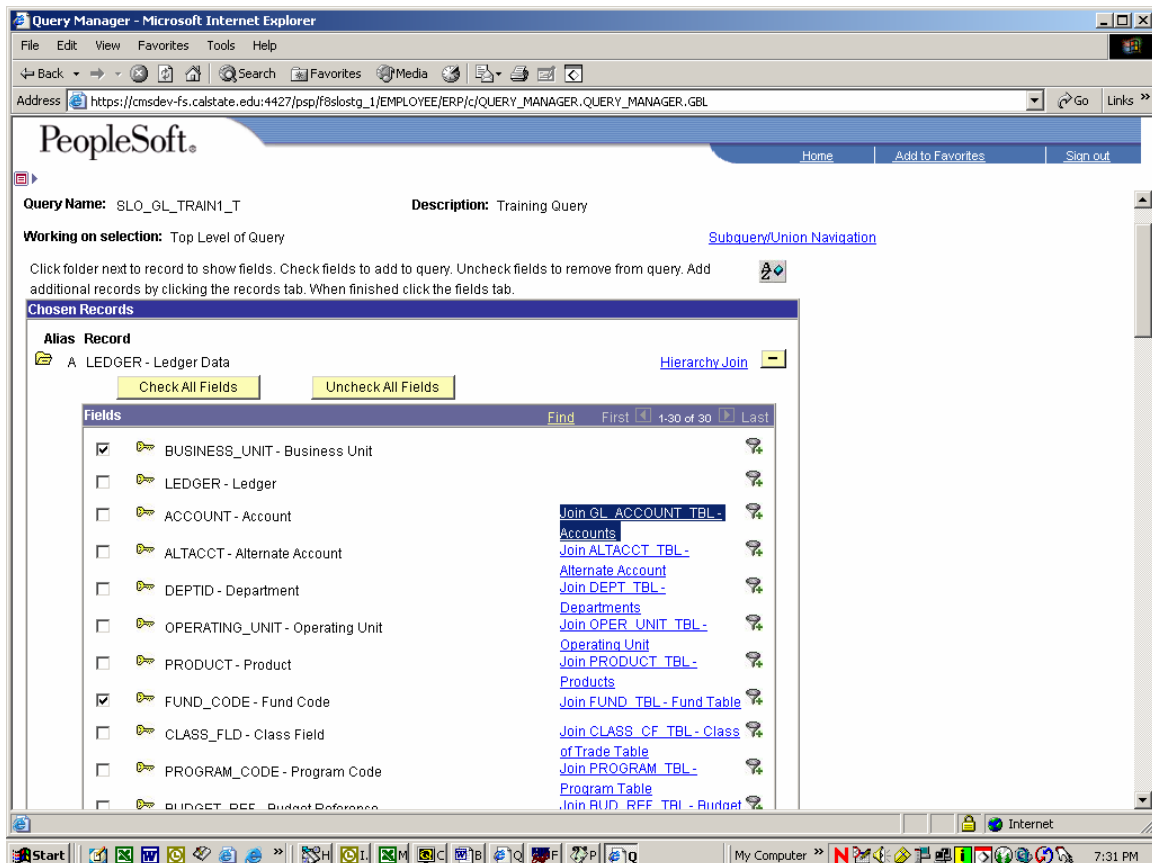
5.1 Joining Two Tables

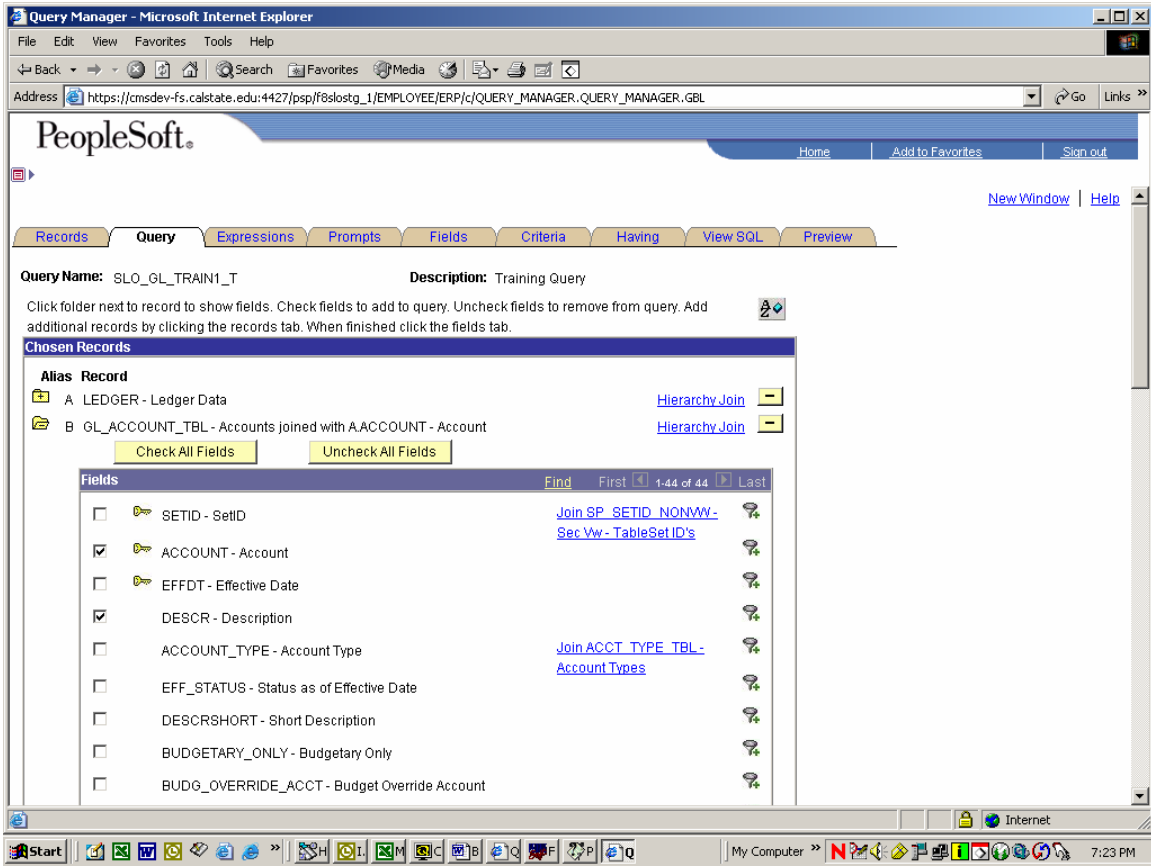
Joining tables greatly extends Query's reach by enabling the user to combine data from multiple tables into a single query. For example, in the previous query we have been displaying in the results table the account number that is being queried. However, we have no what of displaying the description of that account in the results table because Account Description is not one of the fields available in the Record that we are using. Therefore, we will need to join it with another record that DOES contain the Account Description.

It is important to join on all common keys to prevent unexpected results and performance problems.

Fortunately, Query does a lot of work for us. In the following example, the Query tool takes care of joining on common keys for us.

- Use the existing account/fund query SLO_GL_TRAIN1_T
- On the Query page, click the Subquery/Union Navigation hyperlink, and choose Top Level
- Next to the field for ACCOUNT (uncheck the ACCOUNT box), click on the hyperlink for [Join GL_ACCOUNT_TBL - Accounts](#):





- Select the ACCOUNT and DESCR fields

The **Fields** page will look like:

Query Name: SLO_GL_TRAIN1_T Description: Training Query

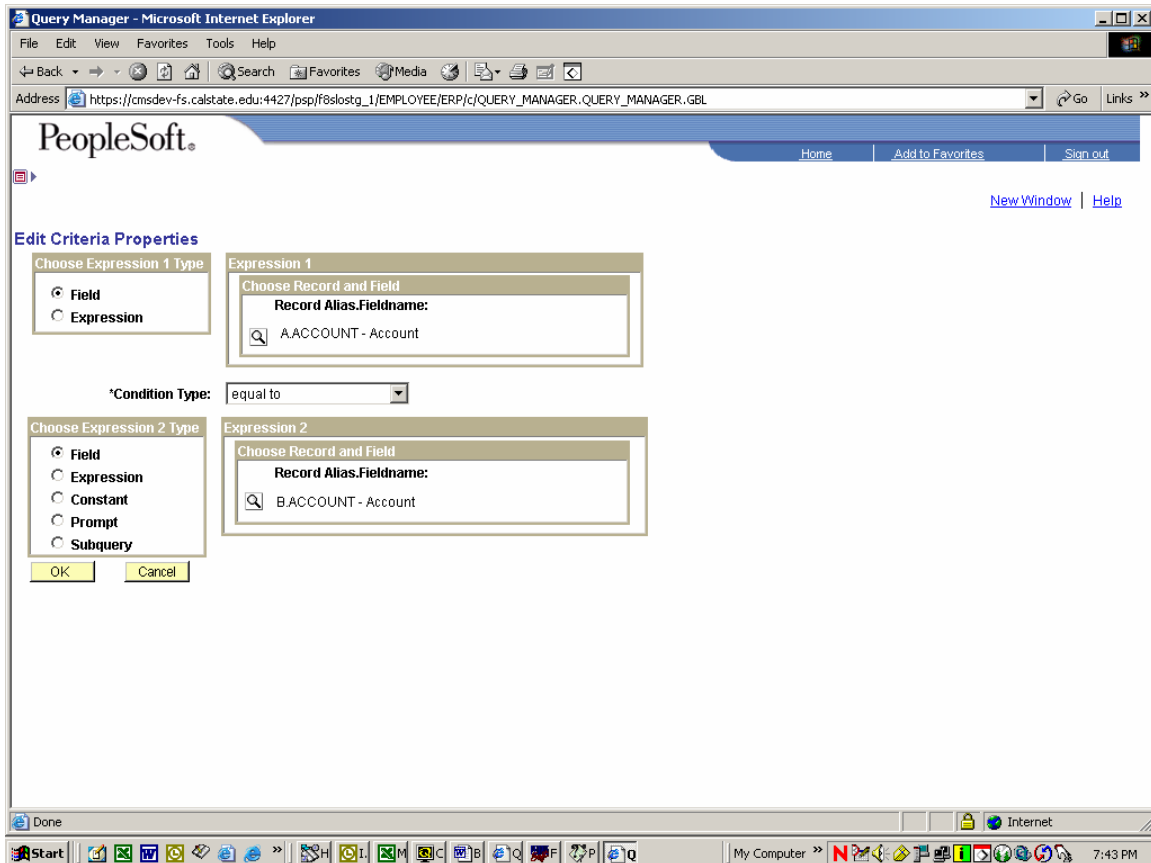
Working on selection: Top Level of Query [Subquery/Union Navigation](#)

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	FUND_CODE - Fund Code	Char5	1			Fund		Edit	-
2	A	BUSINESS_UNIT - Business Unit	Char5				Business Unit		Edit	-
3	A	FISCAL_YEAR - Fiscal Year	Num4.0				Fiscal Year		Edit	-
4	A	POSTED_TOTAL_AMT - Posted Total Amount	SNm25.3			Sum	Sum Total Amt		Edit	-
5	B	ACCOUNT - Account	Char10				Account		Edit	-
6	B	DESCR - Description	Char30				Descr		Edit	-

[Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [New Union](#) [Return to Search](#)

For the B.ACCOUNT field, set up a new criteria for the account number that you wish to query (660003). Edit the A.ACCOUNT field and set the Expression 2 Type equal to "field", then choose B.ACCOUNT for the Expression 2 field; this will link the Account from table A (Ledger Record) to table B (Account Record).



The **Criteria** page will look like (notice that B.EFFDT Effective Date was automatically added):

Query Name: SLO_GL_TRAIN1_T Description: Training Query

[Add Criteria](#) [Group Criteria](#)

Logical	Expression 1	Condition Type	Expression 2	Edit	Delete
	A.FISCAL_YEAR - Fiscal Year	equal to	2003	Edit	-
AND	A.BUSINESS_UNIT - Business Unit	equal to	SLCMP	Edit	-
AND	A.ACCOUNT - Account	equal to	B.ACCOUNT - Account	Edit	-
AND	A.FUND_CODE - Fund Code	equal to	MX024	Edit	-
AND	B.EFFDT - Effective Date	Eff Date <=	Current Date	Edit	-
AND	B.ACCOUNT - Account	equal to	660003	Edit	-

[Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [New Union](#) [Return to Search](#)

Save and Run the new query:

The screenshot shows the PeopleSoft Query Manager interface in a Microsoft Internet Explorer browser window. The browser address bar displays the URL: https://cmsdev-fs.calstate.edu:4427/psp/f8slostg_1/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MANAGER.GBL. The PeopleSoft logo is visible at the top left, and navigation links for Home, Add to Favorites, and Sign out are at the top right. Below the logo, there are links for New Window and Help. The interface features a series of tabs: Records, Query, Expressions, Prompts, Fields, Criteria, Having, View SQL, and Preview. The Preview tab is currently selected. Below the tabs, there are links for View All, Rerun Query, and Download to Excel. A pagination control shows 'First', '1-1 of 1', and 'Last'. The main content area displays a table with the following data:

	Fund	Business Unit	Fiscal Year	Sum Total Amt	Account	Descr
1	MX024	SLCMP	2003	70915.390	660003	Supplies and Services

The Windows taskbar at the bottom shows the Start button, several application icons, and the system tray with the time 7:45 PM.

Notice that the proper description for account 660003 has been retrieved from the Accounting Table and is now displayed in the results table.