



# Query and Advanced Query Manual

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## Overview

Queries can be as simple or as complex as necessary, and they can be one-time ad-hoc queries or queries used repeatedly. Running a query asks the system to search the database for an answer. The database is comprised of records (tables), fields (columns), key fields, and field data (rows). The results generated in a query will depend on the records (tables) selected.

This manual covers the basic concepts of viewing public queries as well as modifying or creating new queries. Users should have a basic understanding of how to use PeopleSoft applications. We recommend completing **PantherSoft Fundamentals** as well as having a full understanding of data and transactions at FIU. To register for training, check the FIU Develop website at <https://develop.fiu.edu/>.

## Types of Queries

PeopleSoft Query provides the following types of queries:

- **User queries:** Create and run queries to retrieve data from the database directly from Windows-based Query Designer, or the web-based Query Manager/Query Viewer applications. These are the primary queries open to the entire user community.
- **Reporting queries:** Reporting queries are the same as user queries, except that they are designed to be used by another reporting tool. Reporting queries can be used as data sources for reports, PS/nVision, or Query Manager.
- **Process queries:** These are queries that are intended to run periodically by batch processes, using PeopleSoft Application Engine and the Query API (application programming interface).

## Query Terminology

**Criteria:** Refines a query by specifying conditions that the retrieved data must meet. This helps the query run the same way each time.

**Prompts:** Extracts specific information without changing the results of the query. A field that requests a required value to run the query.

**Record Definitions:** Design specifications that determine the structure of a PeopleSoft application data table and online processing. In the PeopleSoft database, tables are represented as record definitions. In PeopleSoft Query, tables are also called records.

**Records/Tables:** Made up of columns (**Fields**) and rows (**Data**). Columns determine how the data will be stored. Rows represent the actual data stored in the database. Oracle's PeopleSoft refers to Tables as Records.

**SetID:** Code that is used to group and share configuration data across the application. At FIU, **most** of the control records (i.e., Accounts, Department ID, Activity #) are under SetID 'FIU01' and allows the entire university to use those values.

**Fields:** Column headers within a query that store single pieces of information for each row. (TRAVEL\_AUTH\_ID is a field.)

**Rows:** Data in the field that contains all the information for a unique combination of key values on the table i.e. Travel Authorization number "0000201458" is the data in the field.

**Key Fields:** Fields within a record that hold unique data which identifies that record from all the other records in the file or database e.g., Account number, Transaction IDs, and Name are typical key fields. As an identifier, each key value must be unique in each record. Every record has a key field.

## Roles and Security

The following users can access the Query Tools functionality:

**Query Super Users:** Users who develop queries within PeopleSoft for the user community. They can save Public queries that can be accessed by any user at FIU. They may also have job specific duties that require them to use, develop, and write queries on a regular basis.

**Query Managers:** User with the knowledge and skills received from the training and certification quiz to create and modify queries. They can only save their new or modified queries as Private queries.

**Query Viewers:** Users who can only run public queries but cannot develop or modify queries.

Users have access to data based on security settings within each PantherSoft application. See below for the process to request **Query Viewer or Query Manager** security role within each application. **Query Super Users** are provided their role based on job specification.

**Note:** Access is primarily granted within the Reporting Database and not within Production. However, users can request access to view, create, and modify queries in the Production environment.

## Query Access within PS Human Resources

Users requesting either **Query Viewer** or **Query Manager** within the Human Resources application must have their HR supervisor put in the request with either the Human Resources Help Desk 305-348-2181 or Information Technology 305-348-2284. Users must attend the related training and complete a certification quiz for final approval of the security role. Access is also only granted within the Reporting database.

## Query Access within PS Financials

To gain **Query Viewer** access within PantherSoft Financials to view or run public queries, users must obtain **Access Role 001 Inquiry and Reporting**. By default, this role provides access only within the Reporting Database.

Users should login to PantherSoft Financials and navigate with the NavBar to **Main Menu > Access Request System > Access Request**. Click on the **Add a New Value** tab and **Add** to create a new request. Choose 001 Inquiry and Reporting role and include a business reason under the *Description* field as to why the user is requesting the role. All roles route to the individual's HR Supervisor for approval.

To obtain the security role for **Query Manager**, users must attend the Query 101 training listed in [FIU Develop](#), score 80% or higher on the certification quiz, and send an email to [controller@fiu.edu](mailto:controller@fiu.edu) copying their HR supervisor. The HR supervisor must reply approving the request to receive the role. Access is only granted within the Reporting database.

**Note:** When access to Production is needed, users can send an email to [controller@fiu.edu](mailto:controller@fiu.edu) copying their HR supervisor. The HR supervisor must reply approving the request.

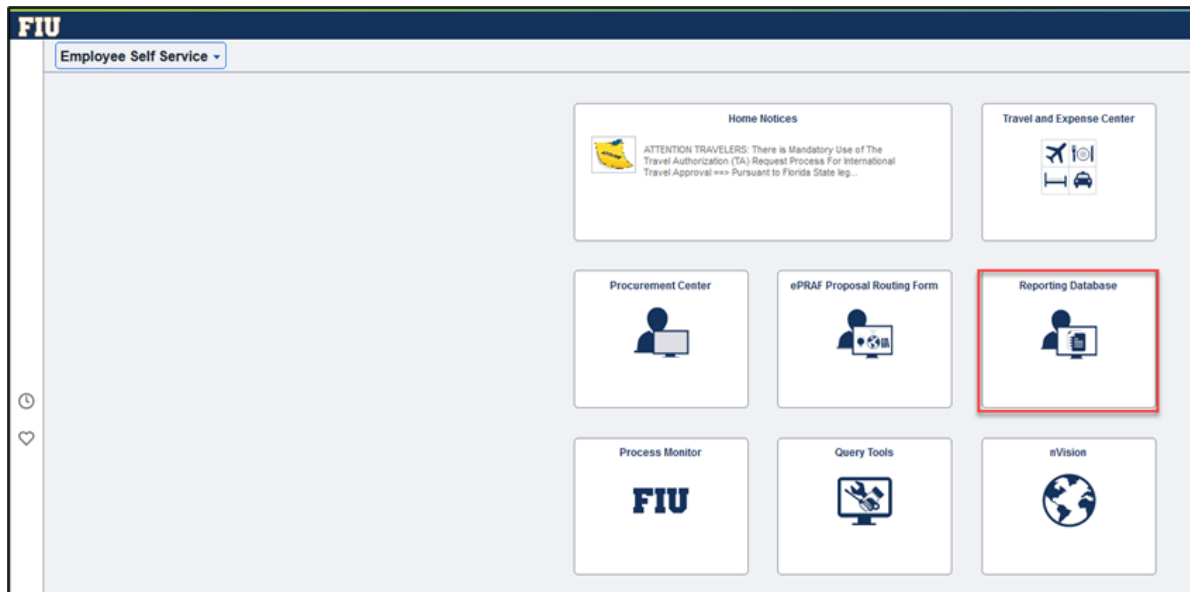
## Query Access within PS Campus Solutions

Users requesting either **Query Viewer** or **Query Manager** access within the Campus Solutions application must login to the Campus Solutions application and request access through the **End User Security Request** Tile. There are two roles within Job Role Campus Community to Run Queries – RPT and Create Queries – RPT. Either must be approved by an HR supervisor and are only granted within the Reporting database. Users must attend the training and pass the certification quiz with 80% or higher for final approval of the security role. For additional information or support please contact [sfsuppor@fiu.edu](mailto:sfsuppor@fiu.edu).

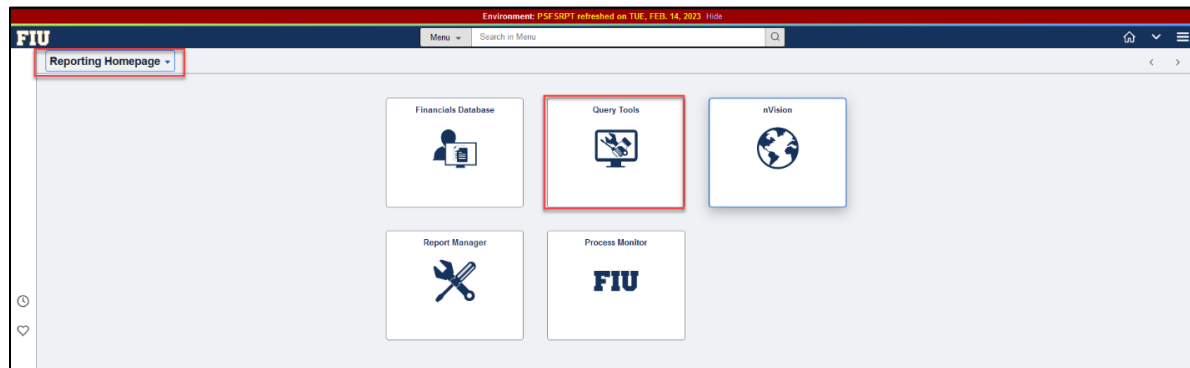
## Reporting Database and VPN Access

The Reporting Database is a PantherSoft Financials environment used exclusively to run and process data. Data and information on reports is 24hrs behind the usual production environment. The Reporting Database can be found through the **Reporting Database** tile as well as a stand-alone URL.

1. Within PantherSoft Financials and from the **Employee Self Service** homepage, click **Reporting Database** Tile.



This will navigate to the Reporting Database environment, proceed with Query Tools tile.



Alternatively, users can navigate to the Reporting Database directly through the Databases website. Visit <http://go.fiu.edu/fiudatabases>

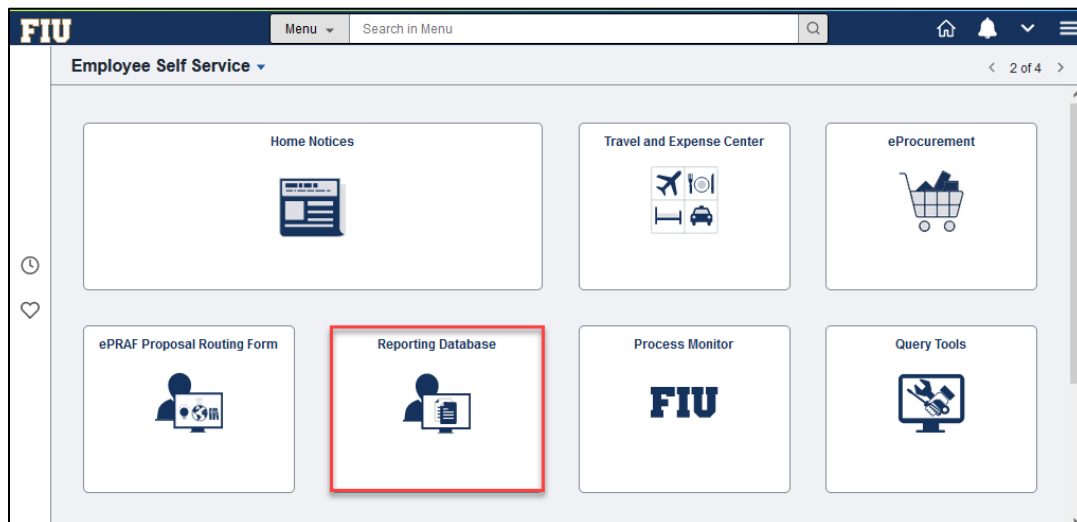
## Query Viewer

**Query Viewer** allows users read-only access to pre-existing queries created by other users in the PantherSoft applications. Query results can be previewed in a web browser or exported to an Excel spreadsheet. Query Viewer is available both within the Reporting database and Production environments. See the [Roles and Security](#) section for information regarding gaining access to Query Viewer within a specified environment (Human Resources, Financials, Campus Solutions).

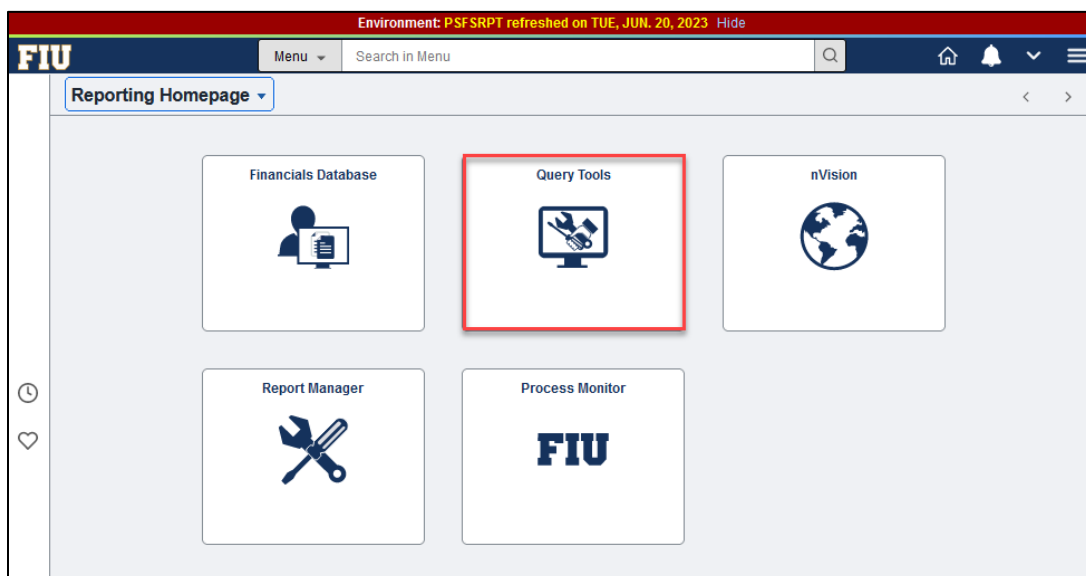
## Running or Viewing a Query

To begin running or viewing a query using **Query Viewer**, login to the Reporting Database. It can be accessed via <http://go.fiu.edu/fiudatabases> or directly through a production application. Note that the Reporting Database requires login to the VPN.

From PantherSoft Financials Production environment, click the **Reporting Database** Tile.



1. Within the PSFSRPT environment, click the **Query Tools** tile.





2. Click on **Query Viewer** and search for the name of a query. Click on [Advanced Search](#) to filter results.

The screenshot shows the 'Query Viewer' interface. At the top, a red banner indicates the environment: 'Environment: PSFSRPT refreshed on MON, JUN. 19, 2023'. Below this is a navigation bar with 'Reporting Homepage' and 'Query Tools'. The left sidebar contains 'Query Manager', 'Query Viewer' (highlighted with a red box), and 'Schedule Queries'. The main area is titled 'Query Viewer' and contains the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this, there is a search bar with a dropdown menu set to '\*Search By' and 'Query Name'. To the right of the dropdown is a text input field with the placeholder 'begins with'. Below the search bar are two buttons: 'Search' and 'Advanced Search' (highlighted with a red box). A red box also highlights the text input field.

Advanced Search view:

The screenshot shows the 'Advanced Search' view in the 'Query Viewer' interface. The top banner indicates the environment: 'Environment: PSFSRPT refreshed on MON, MAR. 20, 2023'. The main area is titled 'Query Viewer' and contains the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this, there are several search criteria, each with a dropdown menu set to 'begins with' and a text input field. The criteria are: 'Query Name', 'Description', 'Uses Record Name', 'Uses Field Name', 'Access Group Name', and 'Folder Name'. Below these is a section for 'Owner' with an equals sign and a dropdown menu. At the bottom, there is a note: 'When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL\_LN.' Below the note are three buttons: 'Search' (highlighted with a red box), 'Clear', and 'Basic Search'.

Use the **Search By** drop-down to find queries by other parameters.

The screenshot shows the 'Query Viewer' interface with the 'Search By' dropdown menu open. The dropdown menu lists the following options: 'Query Name', 'Access Group Name', 'Description', 'Folder Name', 'Owner', 'Query Name', 'Type', 'Uses Field Name', and 'Uses Record Name'. The 'Query Name' option is highlighted. Below the dropdown menu is a table with the following columns: 'Query Name', 'Owner', 'Folder', 'Run to HTML', and 'Run to Excel'. The table is currently empty.

**Query Name:** The name given to a query. There are no spaces, uses capital letters. The naming convention at FIU should have queries begin with FIU and underscore and the name of the department. EX: FIU\_FSSS\_ER\_QUEUE

**Description:** A brief description given to a query

**Uses Record Name:** Searches for a query that includes an associated Record name.

**Uses Field Name:** Searches for a query that includes the name of a specific field.

**Access Group Name:** Searches for a query associated to an Access Group

**Folder Name:** Searches for the name of the folder the query is stored in.

**Owner (Public or Private):** Searches for either private or public queries. Queries saved as private are not searchable by users who do not have public query access.

**Type:** Search for User, Archive, Process, or Role queries.

- After entering search parameters, click **Search**. Results will appear below.

Environment: PSF SRPT refreshed on THU, FEB. 16, 2023 Hide

Query Tools

**Query Viewer**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Query Name begins with FIU\_FSSS

Description begins with EXPENSE REPORT

Uses Record Name begins with

Uses Field Name begins with

Access Group Name begins with

Folder Name begins with

Owner =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB.EMPLOYEE,JRNL\_LN.

Search Clear Basic Search

**Search Results**

\*Folder View -- All Folders --

Query

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
FIU_FSSS_ER_APY_NOAPPROVAL	Expense Report Queue	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
FIU_FSSS_ER_BY_ACTIVITY_NBR	Expense Report by Activity Nu	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
FIU_FSSS_ER_NOAPPROVAL	Expense Report - No Approval	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
FIU_FSSS_ER_QUEUE	Expense Report Queue	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
FIU_FSSS_SHTM_270000000	Expense Reports for SHTM	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

- Choose the Query Name to run or view associated data. Decide which **Run To** option, either HTML or Excel. Run to HTML displays the query results on screen. Run to Excel displays the result in an excel spreadsheet. Run to XML is not used at FIU.

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
FIU_FSSS_ER_QUEUE	Expense Report Queue	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

Many queries involve additional criteria called prompts. These are fields or specific information needed to further refine the results of the query. Prompts may be required to complete running the query.

Queries that are **Run to HTML** may display this way:

**FIU\_FSSS\_ER\_QUEUE - Expense Report Queue**

Exp Report # (No Leading 0)

[View Results](#)

Row	Report ID	Report Descr	Traveler PID	Traveler Name	Report Status	Submission Date	Total Due Employee	Approver PID	Approver Name	Approval Queue
-----	-----------	--------------	--------------	---------------	---------------	-----------------	--------------------	--------------	---------------	----------------

Queries that are **Run to Excel** may display this way. If a prompt is present, enter the information required then click View Results:

← → ↻ 🔒 📄 https://myfsreporting.fiu.edu/psc/fscm\_9/EMPLOYEE/ERP/q/2ICA 80% ☆ 📄 📄 ☰

🔖 Import bookmarks... 📌 PeopleSoft Database S... 🏠 FIU Homepage 🏠

**FIU\_FSSS\_ER\_QUEUE - Expense Report Queue**

Exp Report # (No Leading 0)

[View Results](#)

Row	Report ID	Report Descr	Traveler PID	Traveler Name	Report Status	Sub
-----	-----------	--------------	--------------	---------------	---------------	-----

FIU\_FSSS\_ER\_QUEUE\_50006909.xlsx  
Completed — 3.8 KB

FIU\_FSSS\_ER\_QUEUE\_931751524.xlsx  
Completed — 3.8 KB

[Show all downloads](#)

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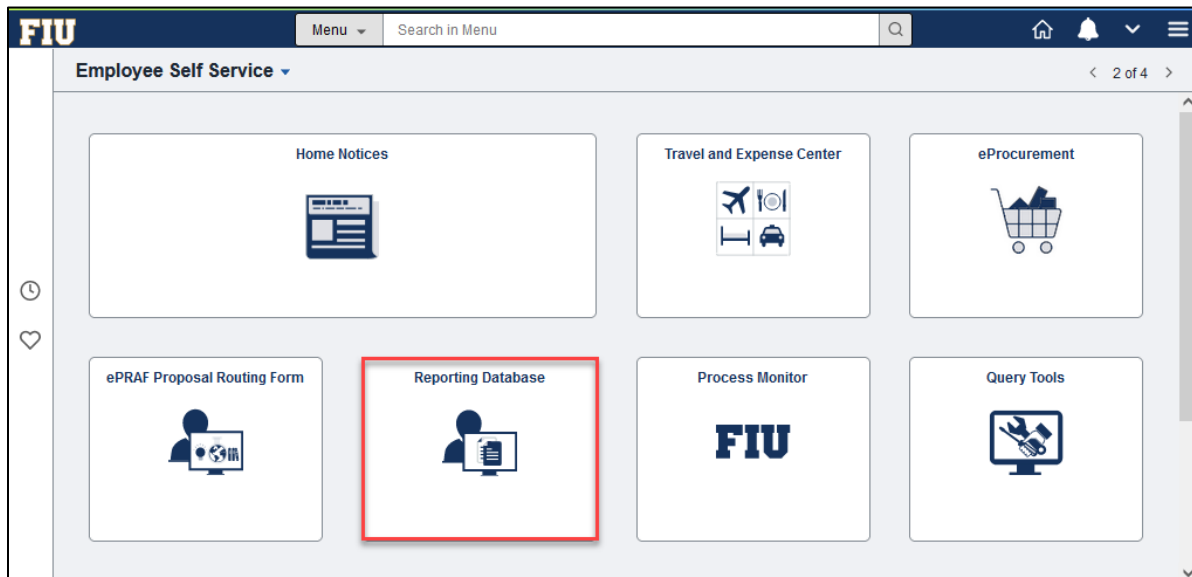
## Query Manager

Users with **Query Manager** security role can create or edit queries without needing to use Standard Query Language (SQL) programming statements. When creating a query, users must navigate to **Query Manager** to edit a query or to access the link for creating a new query.

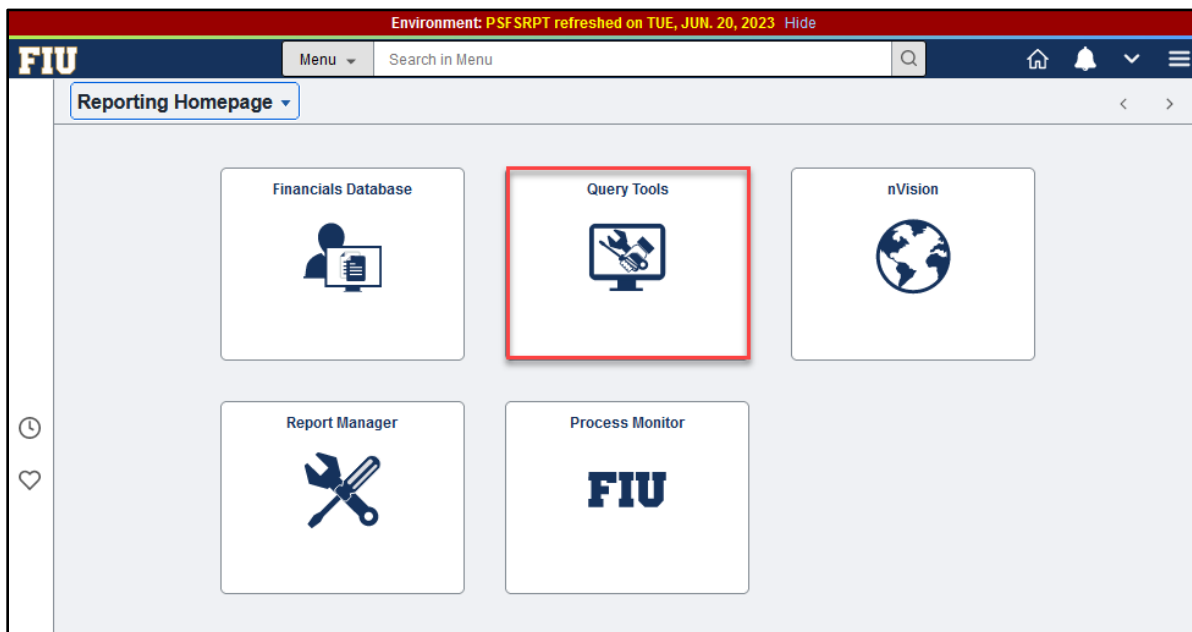
### Create a New Query/Modify Existing Query

Users should login to the Reporting Database first. It can be accessed via <http://go.fiu.edu/fiudatabases> or directly through a production application. Note that the Reporting Database requires login to the VPN.

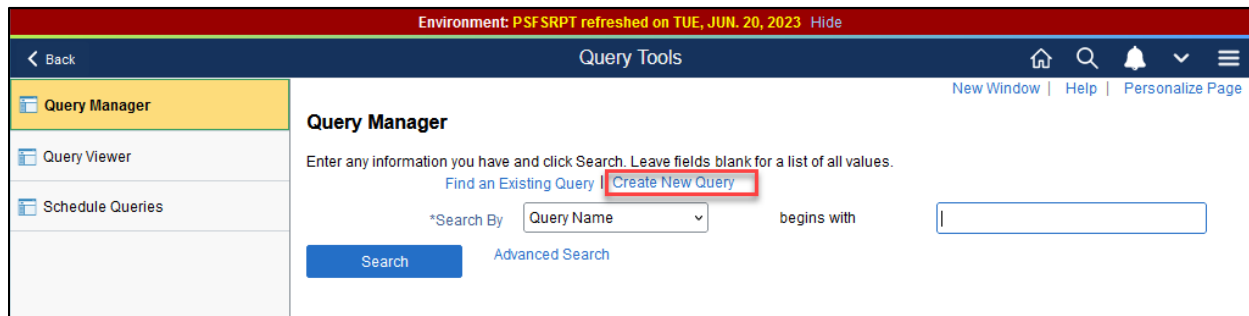
From PantherSoft Financials Production environment, click the **Reporting Database** Tile.



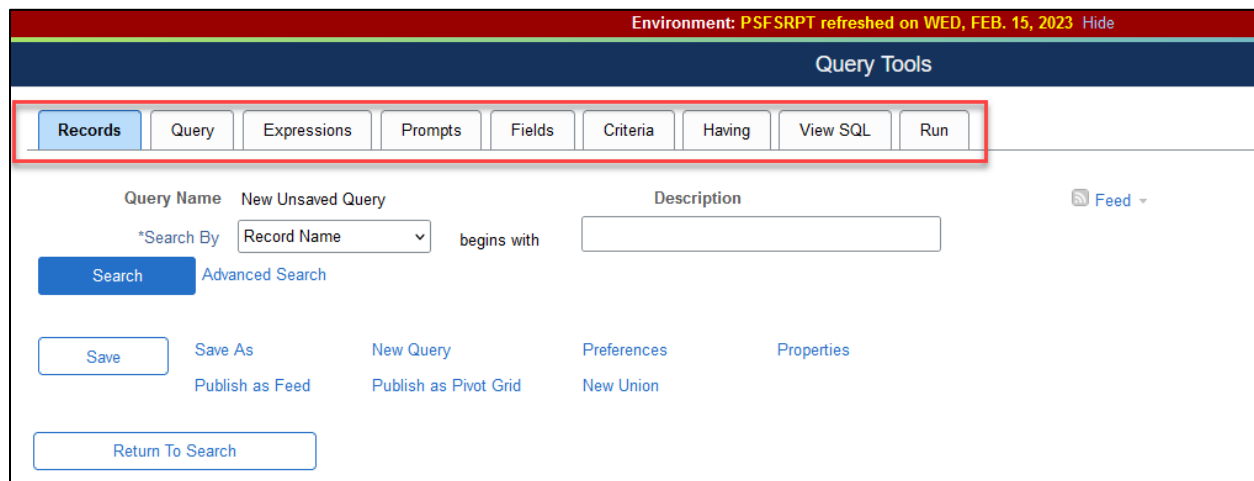
1. Within the PSFSRPT environment, click the **Query Tools** tile.



2. Query Manager is the default navigation. Click [Create New Query](#) link.



3. A new unsaved query will appear with tabs across the top.



**Records Tab** – Adds or joins records to the query.

**Query Tab** – Shows which records are already selected for the query.

**Expressions** – Displays the Expressions if any, that have been added to the query and can create expressions.

**Prompts** – Allows user to add or edit prompts.

**Fields** – Shows the fields currently selected and provides options to create criteria and further work with the fields.

**Criteria** – Shows the specific parameter set that refines how the query will run each time.

**Having** – Create, view, edit criteria based on Aggregated fields.

**View SQL** – Displays the SQL language of the query.

**Run** - Runs the query according to set criteria, records, and fields selected.

Along the bottom of the **Query Tools** pages are useful links: [Save As](#), [New Query](#), [Preferences](#), [Properties](#), [Publish as Feed](#), [Publish as Pivot Grid](#), and [New Union](#).

Query Tools

Records

Query

Expressions

Prompts

Fields

Criteria

Having

View SQL

Run

Query Name

New Unsaved Query

Description

Feed

\*Search By

Record Name

begins with

SPEED

Search

Advanced Search

Search Results

Record

1-4 of 4

View All

Recname	Add Record	Show Fields
SPEEDCHART_DTL - SpeedChart Detail Records	Add Record	Show Fields
SPEEDCHART_HDR - SpeedChart Header Records	Add Record	Show Fields
SPEEDTYP_TBL - SpeedTypes	Add Record	Show Fields
SPEED_USER_TBL - SpeedTypes Users	Add Record	Show Fields

Save

Save As

New Query

Preferences

Properties

Publish as Feed

Publish as Pivot Grid

New Union

Return To Search

**Save As:** Provides the option to save the query.

**New Query:** Replaces the current open window with the creating a new query options.

**Preferences:** Provides Query Preferences such as Name Style and whether to enable Auto Join

**Properties:** Provides Query Properties including save, name/rename options, last updated date/time, and last update user id as well as Distinct and Security Join Optimizer options.

**Publish as Feed/Publish as Pivot Grid options are not available**

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## Searching and Selecting Records

The first step in creating a new query is to choose a Record. Selecting the proper record to add to a query involves familiarity with the data and intuition about the information that users wish to search. To aid with selecting records, there is a list of frequently used [Records](#).

1. After clicking on the [Create New Query](#) link, users must search for and select a record. Use the **Search By** drop-down and/or **begins with** field to enter the name of a Record. Click **Search**. The [Advanced Search](#) link shows more search options.

The same search options, like partial entries and using the wildcard learned in Fundamentals, work within Query as well. Users can also perform a partial search by entering part of a record name or description in the Search By field.

The screenshot shows the 'Query Tools' interface with the 'Records' tab selected. A red box highlights the search section, which includes a 'Query Name' field with the text 'New Unsaved Query', a 'Description' field, and a '\*Search By' dropdown menu set to 'Record Name'. Below the dropdown is a 'begins with' text input field. To the left of these fields are 'Search' and 'Advanced Search' buttons. Below the search section are buttons for 'Save', 'Save As', 'New Query', 'Preferences', 'Properties', 'Publish as Feed', 'Publish as Pivot Grid', and 'New Union'. At the bottom is a 'Return To Search' button.

Advanced Search options:

The screenshot shows the 'Query Tools' interface with the 'Records' tab selected. A red box highlights the advanced search section, which includes four dropdown menus: 'Record Name' (set to 'begins with'), 'Description' (set to 'begins with'), 'Uses Field Name' (set to 'begins with'), and 'Access Group Name' (set to 'begins with'). To the right of these dropdowns are four corresponding text input fields. Below the input fields is a magnifying glass icon. Below the search section are buttons for 'Search' (highlighted with a red box), 'Clear', and 'Basic Search'. Below these are buttons for 'Save', 'Save As', 'New Query', 'Preferences', 'Properties', 'Publish as Feed', 'Publish as Pivot Grid', and 'New Union'. At the bottom is a 'Return To Search' button.

2. Search results will appear. Click [Add Record](#) to choose the desired record. Click [Show Fields](#) to display a list of all the fields within the record available for selection.

RecordsQueryExpressionsPromptsFieldsCriteriaHavingView SQLRun

Query NameNew Unsaved QueryDescription

Record Name

begins with

SPEED

Description

begins with

Uses Field Name

begins with

Access Group Name

begins with

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL\_LN.

Search

Clear

Basic Search

Search Results

Record

1-4 of 4

View All

Recname	Add Record	Show Fields
SPEEDCHART_DTL - SpeedChart Detail Records	Add Record	Show Fields
SPEEDCHART_HDR - SpeedChart Header Records	Add Record	Show Fields
SPEEDTYP_TBL - SpeedTypes	Add Record	Show Fields
SPEED_USER_TBL - SpeedTypes Users	Add Record	Show Fields

Save

Save As

New Query

Preferences

Properties

Publish as Feed

Publish as Pivot Grid

New Union

Return To Search

**Show Fields:** Displays a preview of the record's fields. Users can click **Return** to go back to the **Records** tab page.

RecordsQueryExpressionsPromptsFieldsCriteriaHavingView SQL

Query NameNew Unsaved QueryDescription

Record Name

begins with

SPEED

Description

begins with

Uses Field Name

begins with

Access Group Name

begins with

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL\_LN.

Search

Clear

Basic Search

Search Results

Record

1-4 of 4

View All

Recname	Add Record	Show Fields
SPEEDCHART_DTL - SpeedChart Detail Records	Add Record	Show Fields
SPEEDCHART_HDR - SpeedChart Header Records	Add Record	Show Fields
SPEEDTYP_TBL - SpeedTypes	Add Record	Show Fields
SPEED_USER_TBL - SpeedTypes Users	Add Record	Show Fields

Save

Save As

New Query

Preferences

Properties

Publish as Feed

Publish as Pivot Grid

New Union

Return To Search

Fields for record SPEEDCHART\_HDR - SpeedChart Header Records:

Fieldname

Key	Description
Y	SETID - SetID
Y	SPEEDCHART_KEY - SpeedChart Key
Y	OPRID - User ID
Y	OPRCLASS - Primary Permission List
Y	EFFDT - Effective Date
	EFF_STATUS - Status as of Effective Date
	DESCR - Description
	SPEEDTYPE_TYPE - Type of SpeedType
	TOTAL_LINES - SpeedChart Total Lines
	UNIT_OF_MEASURE - Unit of Measure
	SPDCHRT_DEFN_FLG - SpeedChart Definition Flag
	DESCRLONG - Description

Return



**Add Record:** Adds/Selects the record; it will appear under the **Query** tab.

Records

Query

Expressions

Prompts

Fields

Criteria

Having

View SQL

Run

Query Name

New Unsavd Query

Description

Feed

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

SPEEDTYP\_TBL - SpeedTypes

Check All

Uncheck All

Hierarchy Join

Fields

1-29 of 29

View All

☐

SETID - SetID

Join SP\_SETID\_NONVW - Sec Vw - TableSet ID's

☐

SPEEDTYPE\_KEY - SpeedType Key

Join OPRID\_VW - View of Opr IDs in PSOPRDEFN

☐

OPRID - Operator Id

☐

OPRCLASS - Primary Permission List

☐

DESCR - Description

☐

ACCOUNT - Account

Join GL\_ACCOUNT\_TBL - Accounts

☐

ALTACCT - Alternate Account

Join ALTACCT\_XREF - Alternate Account xREF

☐

DEPTID - Department

Join DEPT\_TBL - Departments

☐

BUSINESS\_UNIT\_PC - PC Business Unit

☐

PROJECT\_ID - Project

☐

ACTIVITY\_ID - Activity

☐

RESOURCE\_TYPE - Source Type

Join PROJ\_RESTYPE\_FS - Project Resource Types View

☐

RESOURCE\_CATEGORY - Category

☐

RESOURCE\_SUB\_CAT - Subcategory

☐

ANALYSIS\_TYPE - Analysis Type

☐

OPERATING\_UNIT - Operating Unit

Join OPER\_UNIT\_TBL - Operating Unit

☐

PRODUCT - Task

Join PRODUCT\_TBL - Products

☐

FUND\_CODE - Fund Code

Join FUND\_TBL - Fund Table

☐

CLASS\_FLD - Site

Join CLASS\_CF\_TBL - Class of Trade Table

☐

PROGRAM\_CODE - Program Code

Join PROGRAM\_TBL - Program Table

☐

BUDGET\_REF - Budget Reference

Join BUD\_REF\_TBL - Budget Reference Table

☐

AFFILIATE - Affiliate

Join AFFILIATE\_VW - View of GL Bus Unit Table

☐

AFFILIATE\_INTRA1 - Fund Affiliate

☐

AFFILIATE\_INTRA2 - Operating Unit Affiliate

☐

CHARTFIELD1 - Activity Nbr

Join CHARTFIELD1\_TBL - Chartfield1

☐

CHARTFIELD2 - Cost PID

Join CHARTFIELD2\_TBL - Chartfield2

☐

CHARTFIELD3 - ChartField 3

Join CHARTFIELD3\_TBL - Chartfield3

☐

CURRENCY\_CD - Currency Code

Join CURRENCY\_CD\_TBL - Currency Codes

☐

STATISTICS\_CODE - Statistics Code

Join STAT\_TBL - Statistics Codes

Save

Save As

New Query

Preferences

Properties

Publish as Feed

Publish as Pivot Grid

New Union

Return To Search

## Saving a Query

When editing or creating queries, any changes or edits do not save automatically. In addition, saving a query is only available within **Query Manager**. Users must scroll to the bottom of the screen and access the [Save As](#) link.

1. To save a Query via **Query Manager** select [Save As](#).

The screenshot shows the 'Query Tools' interface. On the left is a sidebar with 'Query Manager', 'Query Viewer', and 'Schedule Queries'. The main area displays a table of fields with columns: Col, Record.FieldName, Format, Ord, XLAT, Agg, Heading Text, Add Criteria, and Edit. The table lists 9 fields, including A.SETID, A.SPEEDTYPE\_KEY, A.OPRID, A.DESCR, A.DEPTID, A.BUSINESS\_UNIT\_PC, A.FUND\_CODE, A.PROGRAM\_CODE, and A.CHARTFIELD1. At the bottom, there are buttons for 'Save', 'Save As' (highlighted with a red box), 'New Query', 'Preferences', 'Properties', 'Publish as Feed', 'Publish as Pivot Grid', 'New Union', and 'Return To Search'.

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit
1	A.SETID - SetID	Char5				SetID		<a href="#">Edit</a>
2	A.SPEEDTYPE_KEY - SpeedType Key	Char10				SpeedType		<a href="#">Edit</a>
3	A.OPRID - Operator Id	Char30				Operator		<a href="#">Edit</a>
4	A.DESCR - Description	Char30				Descr		<a href="#">Edit</a>
5	A.DEPTID - Department	Char10				Dept		<a href="#">Edit</a>
6	A.BUSINESS_UNIT_PC - PC Business Unit	Char5				PC Bus Unit		<a href="#">Edit</a>
7	A.FUND_CODE - Fund Code	Char5				Fund		<a href="#">Edit</a>
8	A.PROGRAM_CODE - Program Code	Char5				Program		<a href="#">Edit</a>
9	A.CHARTFIELD1 - Activity Nbr	Char10				Activity Nbr		<a href="#">Edit</a>

2. Enter a short name for the query in the **Query** field. Query names must follow the standard naming convention: FIU\_DEPARTMENT\_QUERY\_DESCRIPTION; cannot have spaces or symbols.

The dialog box titled 'Enter a name to save this query as:' contains the following fields and options:

- \*Query**: FIU\_FSSS\_TA\_QUEUE (highlighted with a red box)
- Description**: Travel Authorization Queue
- Folder**: (empty text box)
- \*Query Type**: User (dropdown menu)
- \*Owner**: Private (dropdown menu)
- Query Definition**: (empty text box)
- Buttons**: OK, Cancel

3. Enter information that will help describe and identify what the query is about in the **Description** field.

**Enter a name to save this query as:**

\*Query

Description

Folder

\*Query Type

\*Owner

Query Definition

4. Select a **Query Type** from the drop-down menu. Standard queries are designated as *User* queries. The *Archive*, *Process*, or *Role* options apply to Workflow queries. Workflow is not currently implemented by FIU. Select the default option: *User*.

**Enter a name to save this query as:**

\*Query

Description

Folder

\*Query Type

\*Owner

Query Definition

5. The Owner field will default to: *Private*. *Private* indicates that only the user ID that created the query can open, run, modify, or delete the query while *Public* means that any user with access to the records used by the query can run, modify, or delete the query. The ability to save a query as *Public* will vary depending on a users' level of security.

**Enter a name to save this query as:**

\*Query

Description

Folder

\*Query Type

\*Owner

Query Definition

OK Cancel

6. Enter the Query Definition which can be a long description, i.e. "This query shows all the Hazardous Materials Ship To locations." Then, click **OK**.

**Enter a name to save this query as:**

\*Query

Description

Folder

\*Query Type

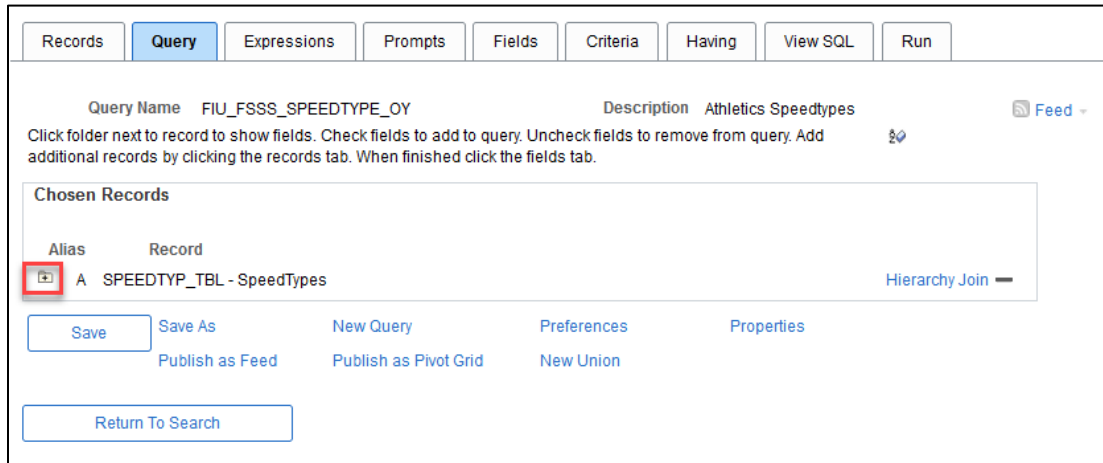
\*Owner

Query Definition

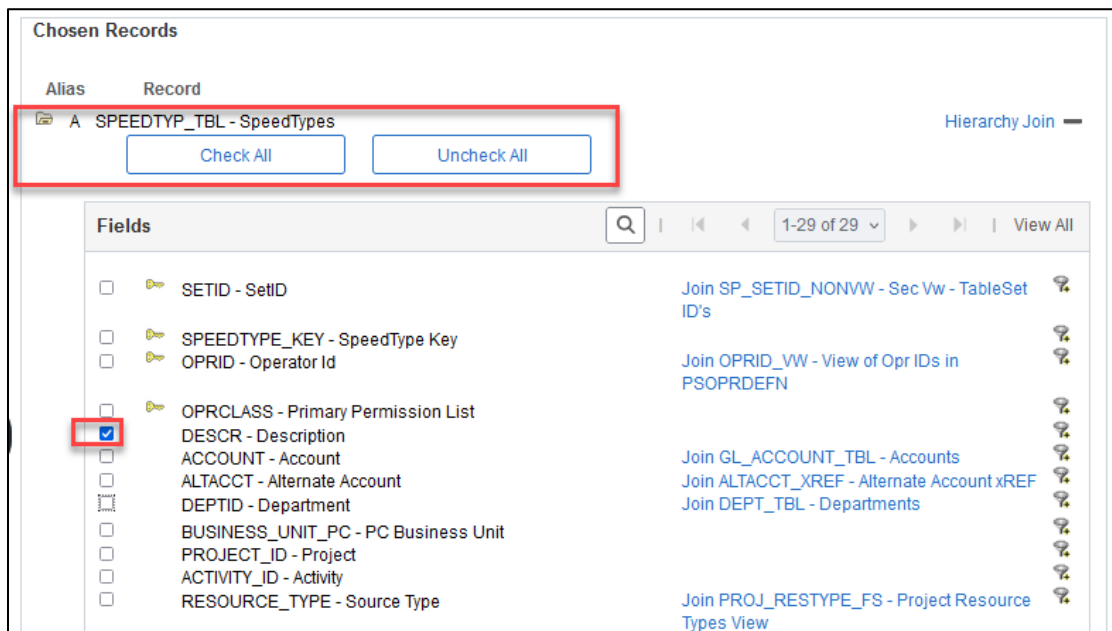
OK Cancel

## Query Tab

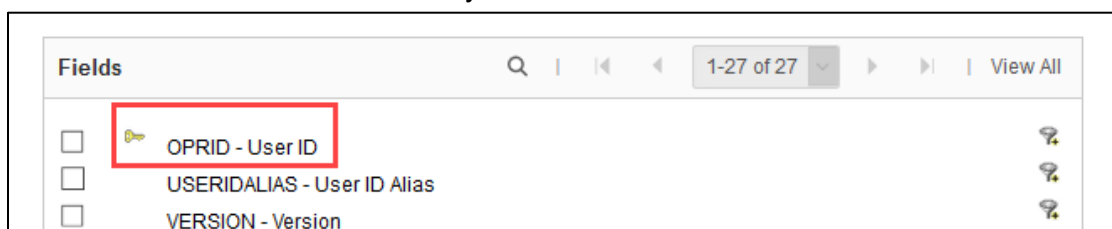
The **Query** Tab includes options related to records already chosen for a query. Users can click the folder icon next to a record to expand or collapse and show fields.



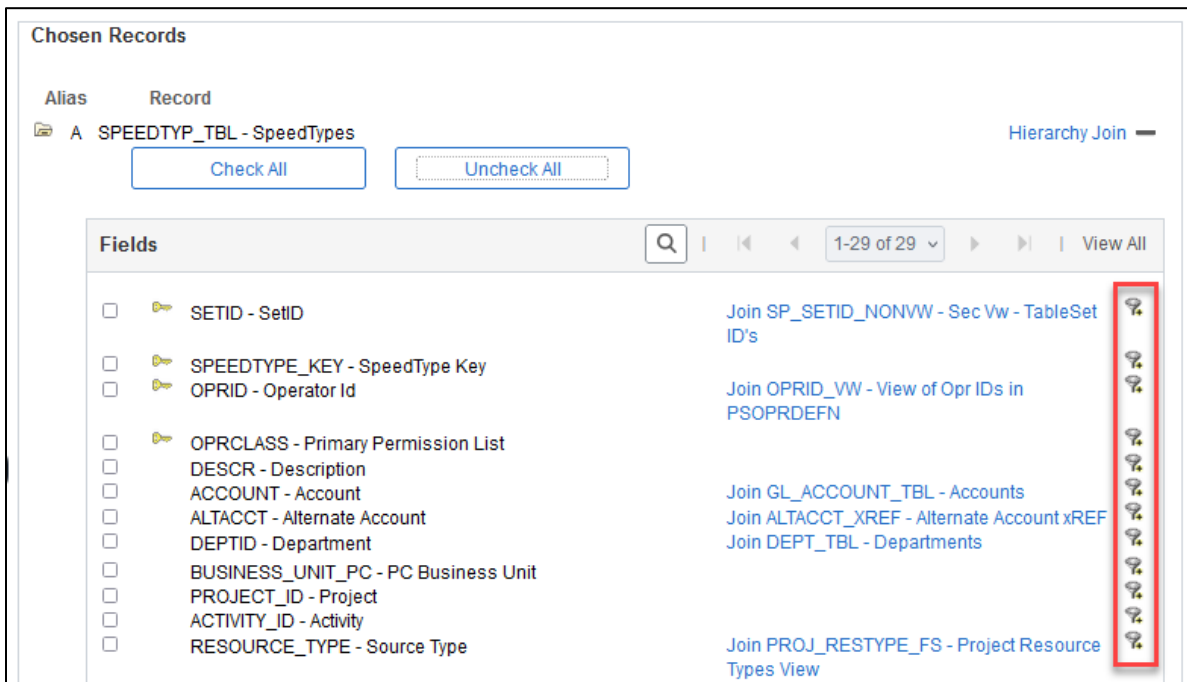
Check boxes to add fields, uncheck boxes to remove fields from the query. Once a record folder is expanded, there are also buttons for **Check All** and **Uncheck All**. It may be helpful to check all fields to view the data contained in those fields.



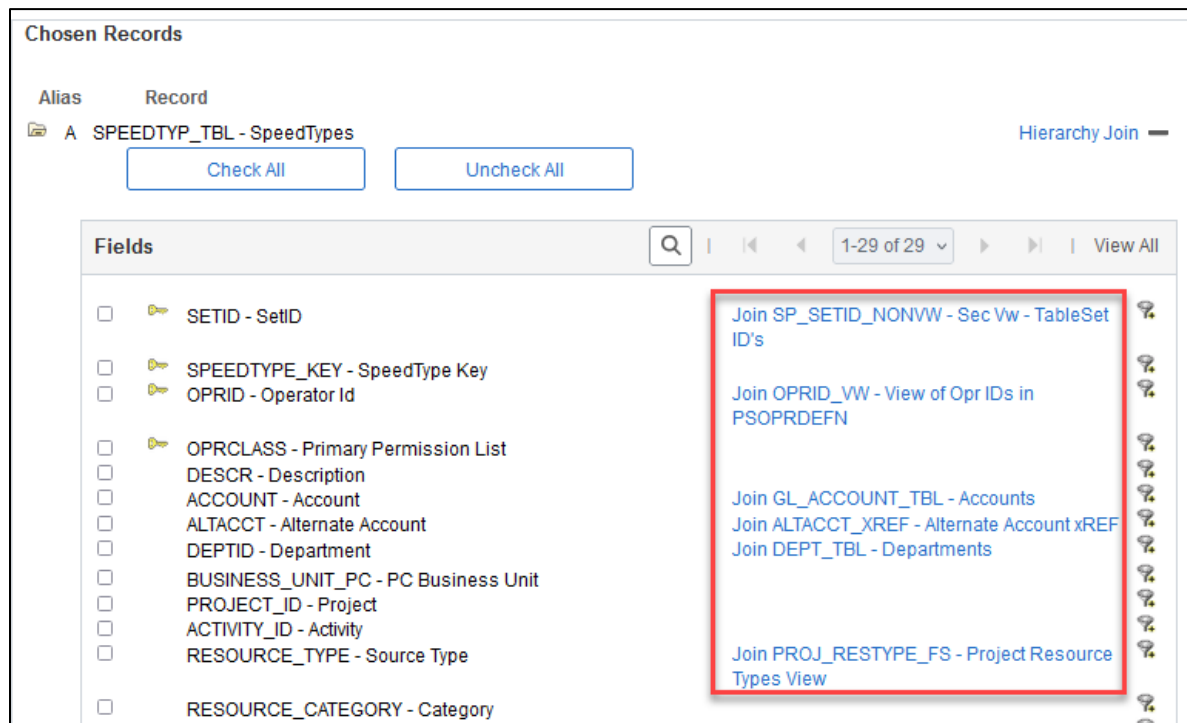
The key icon next to a field indicates this is a key field of the record.



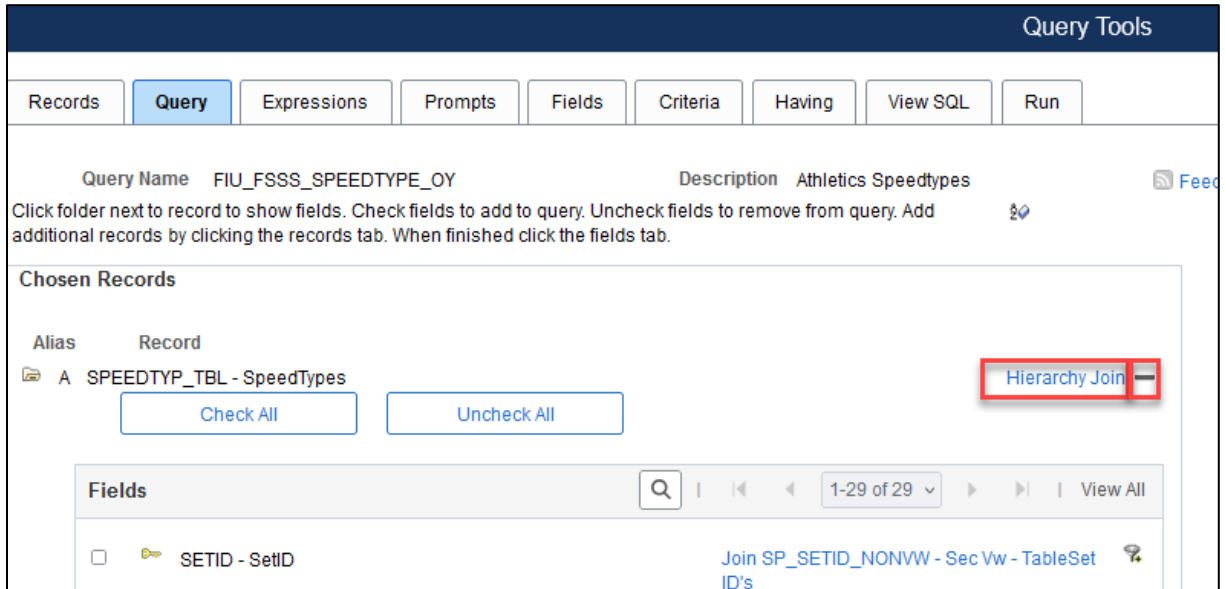
The **Use as Criteria** icon is located to the right of the fields. By clicking on this icon, criteria can be created for that field.



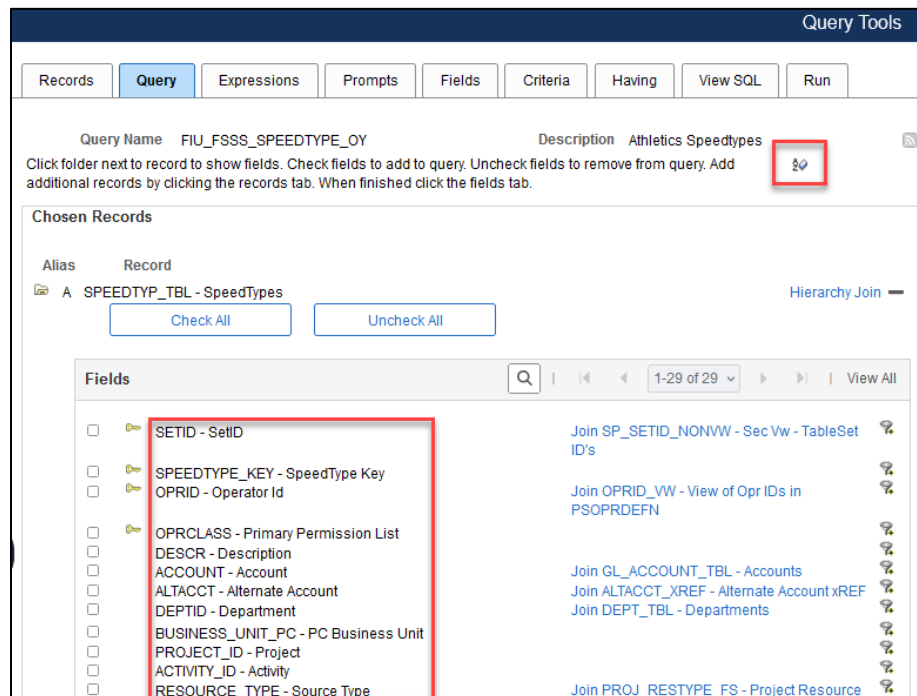
Some fields will have blue links next to them. These provide the ability to create joins to additional records, called **Related Record Join**.



For each joined record, there are two options: to Delete a record with the minus sign and to join a child table to its parent table via the [Hierarchy Join](#) link.



Click the **Sort fields alphabetically** button once to list fields in alphabetical order. Click the button again to return to original sort. Fields displayed top to bottom on this screen will run left to right within the query if chosen.



## Field Tab

The **Field** Tab provides options related to the fields already chosen within the query. Users can change field properties using Reorder/Sort and Edit to change the labels of the field.

Query Tools

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

Query Name FIU\_FSSS\_SPEEDTYPE\_OY Description Athletics Speedtypes Feed

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

Fields

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.SETID - SetID	Char5				SetID		Edit	—
2	A.SPEEDTYPE_KEY - SpeedType Key	Char10				SpeedType		Edit	—
3	A.OPRID - Operator Id	Char30				Operator		Edit	—
4	A.DESCR - Description	Char30				Descr		Edit	—
5	A.DEPTID - Department	Char10				Dept		Edit	—
6	A.FUND_CODE - Fund Code	Char5				Fund		Edit	—
7	A.PROGRAM_CODE - Program Code	Char5				Program		Edit	—
8	A.CHARTFIELD1 - Activity Nbr	Char10				Activity Nbr		Edit	—

## Editing Field Properties

Users can alter the way the field name appears within the query by clicking on **Edit** within the field line. This will edit the field heading in the query, but it does not change the field name on the record.

Query Tools

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

Query Name New Unsavd Query Description Feed

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

Fields

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.SETID - SetID	Char5				SetID		Edit	—
2	A.SPEEDTYPE_KEY - SpeedType Key	Char10				SpeedType		Edit	—
3	A.OPRID - Operator Id	Char30				Operator		Edit	—
4	A.DESCR - Description	Char30				Descr		Edit	—
5	A.DEPTID - Department	Char10				Dept		Edit	—
6	A.FUND_CODE - Fund Code	Char5				Fund		Edit	—
7	A.PROGRAM_CODE - Program Code	Char5				Program		Edit	—
8	A.CHARTFIELD1 - Activity Nbr	Char10				Activity Nbr		Edit	—

Options appear under the **Heading** box. Choose one of the following options to edit the name of a field, then click **OK**.



**No Heading:** The column in the query will not have a heading; the field name will not show.

**Text:** The column heading in the query is any customized text that is typed within the **Heading Text** field. The field will be customized to what is typed.

**RFT Short:** The column heading is the short name from the record definition; what appears to the left of the dash. Example: Descr

**RFT Long:** The column heading is the long name from the record definition; what appears to the right of the dash. Example: Description

### Edit Field Properties

Field Name    A.DESCR - Description

**Heading**

☐ No Heading    ☐ RFT Short

☐ Text    ☒ RFT Long

Heading Text

Descr

\*Unique Field Name

A.DESCR

**Aggregate**

☒ None

☐ Sum

☐ Count

☐ Min

☐ Max

☐ Average

☐ Count Distinct

OK    Cancel

Employee Self Service

Query Tools

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

Query Name   New Unsavd Query   Description   [Feed](#)

View field properties, or use field as criteria in query statement.   [Reorder / Sort](#)

Fields

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.SETID - SetID	Char5				SetID		<a href="#">Edit</a>	—
2	A.SPEEDTYPE_KEY - SpeedType Key	Char10				SpeedType		<a href="#">Edit</a>	—
3	A.OPRID - Operator Id	Char30				Operator		<a href="#">Edit</a>	—
4	A.DESCR - Description	Char30				Description		<a href="#">Edit</a>	—
5	A.DEPTID - Department	Char10				Dept		<a href="#">Edit</a>	—
6	A.FUND_CODE - Fund Code	Char5				Fund		<a href="#">Edit</a>	—
7	A.PROGRAM_CODE - Program Code	Char5				Program		<a href="#">Edit</a>	—
8	A.CHARTFIELD1 - Activity Nbr	Char10				Activity Nbr		<a href="#">Edit</a>	—

## Changing Column and Sort Order

Users can change the order the columns (fields) display within the query as well as how the data is sorted within those columns. Click the **Reorder/Sort** button for those options.

Query Tools

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

Query Name FIU\_FSSS\_SPEEDTYPE\_OY Description Athletics Speedtypes Feed

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

**Reorder / Sort**

Fields

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.SETID - SetID	Char5				SetID		Edit	—
2	A.SPEEDTYPE_KEY - SpeedType Key	Char10				SpeedType		Edit	—
3	A.OPRID - Operator Id	Char30				Operator		Edit	—
4	A.DESCR - Description	Char30				Descr		Edit	—
5	A.DEPTID - Department	Char10				Dept		Edit	—
6	A.FUND_CODE - Fund Code	Char5				Fund		Edit	—
7	A.PROGRAM_CODE - Program Code	Char5				Program		Edit	—

The **Edit Field Ordering** box will appear. Fields appear in the order they were chosen from top to bottom. They will display when the query runs from left to right.

To change the order of the columns (fields), use the **New Column** boxes next to the column or field to be changed. Enter a number next to the field that is to be first, second, third. In the example below the 4th column will now be Column 1, followed by Column 6th. Columns left blank are automatically assigned a consecutive number. The same number cannot be used on multiple fields. Click **OK** if that is all that is being changed.

**Edit Field Ordering**

Reorder columns by entering column numbers on the left. Columns left blank or assigned a 0 will be automatically assigned a number. Change the order by number by entering numbers on the right. To remove an order by number, leave the field blank or enter a 0.

Edit Field Ordering

New Column	Column	Record.FieldName	Order By	Descending	New Order By
	1	A.SETID - SetID		<input type="checkbox"/>	
	2	A.SPEEDTYPE_KEY - SpeedType Key		<input type="checkbox"/>	
	3	A.OPRID - Operator Id		<input type="checkbox"/>	
1	4	A.DESCR - Description		<input type="checkbox"/>	
	5	A.DEPTID - Department		<input type="checkbox"/>	
2	6	A.FUND_CODE - Fund Code		<input type="checkbox"/>	
	7	A.PROGRAM_CODE - Program Code		<input type="checkbox"/>	
	8	A.CHARTFIELD1 - Activity Nbr		<input type="checkbox"/>	

OK Cancel

To change any column or field to sort the data in **descending** order, simply check the box next to the field(s) within the **Descending** column. Then, click **OK** if nothing else is to be changed.

**Edit Field Ordering**

Reorder columns by entering column numbers on the left. Columns left blank or assigned a 0 will be automatically assigned a number. Change the order by number by entering numbers on the right. To remove an order by number, leave the field blank or enter a 0.

**Edit Field Ordering**

1-8 of 8 | View All

New Column	Column	Record.FieldName	Order By	Descending	New Order By
	1	A.SETID - SetID		<input type="checkbox"/>	
	2	A.SPEEDTYPE_KEY - SpeedType Key		<input checked="" type="checkbox"/>	
	3	A.OPRID - Operator Id		<input type="checkbox"/>	
	4	A.DESCR - Description		<input type="checkbox"/>	
	5	A.DEPTID - Department		<input type="checkbox"/>	
	6	A.FUND_CODE - Fund Code		<input type="checkbox"/>	
	7	A.PROGRAM_CODE - Program Code		<input type="checkbox"/>	
	8	A.CHARTFIELD1 - Activity Nbr		<input type="checkbox"/>	

OK Cancel

The **New Order By** column is used to sort the associated field data selected in ascending order. Users will need to enter 1 in the **New Order By** column next to the field that needs to be sorted first. If additional fields need to be sorted, add sequential numbers to indicate the order you want to sort by. If a field is left blank or a 0 is entered, no sorting will take place. In the example below, the query results (rows) will show A. DEPTID field sorted from smaller to larger value. Click **OK** if there are no other changes.

**Edit Field Ordering**

Reorder columns by entering column numbers on the left. Columns left blank or assigned a 0 will be automatically assigned a number. Change the order by number by entering numbers on the right. To remove an order by number, leave the field blank or enter a 0.

**Edit Field Ordering**

1-8 of 8 | View All

New Column	Column	Record.FieldName	Order By	Descending	New Order By
	1	A.SETID - SetID		<input type="checkbox"/>	
	2	A.SPEEDTYPE_KEY - SpeedType Key		<input type="checkbox"/>	
	3	A.OPRID - Operator Id		<input type="checkbox"/>	
	4	A.DESCR - Description		<input type="checkbox"/>	
	5	A.DEPTID - Department		<input type="checkbox"/>	1
	6	A.FUND_CODE - Fund Code		<input type="checkbox"/>	
	7	A.PROGRAM_CODE - Program Code		<input type="checkbox"/>	
	8	A.CHARTFIELD1 - Activity Nbr		<input type="checkbox"/>	

OK Cancel

## Criteria Tab

The **Criteria** Tab provides the options to add specific conditions to a query which will refine and return specific rows of data. Without criteria, users can retrieve every row of data within a table or record by simply selecting the fields and running a query.

The screenshot shows the 'Query Tools' interface. At the top, there is a navigation bar with tabs: Records, Query, Expressions, Prompts, Fields, **Criteria** (highlighted with a red box), Having, View SQL, and Run. Below the navigation bar, the 'Query Name' is 'FIU\_FSSS\_SPEEDTYPE\_OY' and the 'Description' is 'Athletics Speedtypes'. A red box highlights the 'Add Criteria' button. Below this button, there is a message: 'No criteria have been added yet.' At the bottom, there is a 'Return To Search' button.

Select the **Criteria** Tab and click the **Add Criteria** button.

This screenshot is identical to the previous one, showing the 'Query Tools' interface with the 'Criteria' tab selected. The 'Add Criteria' button is highlighted with a red box, and the message 'No criteria have been added yet.' is visible.

The **Edit Criteria Properties** page appears.

The screenshot shows the 'Edit Criteria Properties' dialog box. It has a title bar 'Query Tools' and a title 'Edit Criteria Properties'. The dialog is divided into two main sections: 'Expression 1' and 'Expression 2'. In the 'Expression 1' section, 'Choose Expression 1 Type' has 'Field' selected. 'Choose Record and Field' has a text box with 'Record Alias.Fieldname' and a search icon. In the 'Expression 2' section, 'Choose Expression 2 Type' has 'Constant' selected. 'Define Constant' has a text box with 'Constant' and a search icon. A '\*Condition Type' dropdown is set to 'equal to'. At the bottom, there are 'OK' and 'Cancel' buttons.

## Criteria Properties

**Expression 1 Type:** Defines the criteria being added. Can be a Field or Expression.

**Expression 1:** The Field or Expression the Criteria is being compared to.

**Expression 2 Type:** Defines where the Comparison Value the Criteria is being compared against comes from; usually, Field, Expression, Prompt, Constant or Subquery though the options can change based on the Condition Type selected.

**Expression 2:** The Value the Criteria will be compared against.

Value Type	Action
Field	The value in the selected field is compared to the value in another field, usually a field in another record component.
Expression	The value in the selected field is compared to an expression you enter, which PeopleSoft Query evaluates once for each row before comparing the result to the value in the selected field.
Constant	The value in the selected field is compared to a single fixed value.
Subquery	The value in the selected field is compared to the data returned by a subquery.
Prompt	The value in the selected field is compared to a value that you enter when running the query.

By default, the **Field** option is selected in the **Choose Expression 1 Type** box. Select a specific field from a table/record that has been chosen within the query by clicking on the search glass icon under **Expression 1, Choose Record and Field**.

Query Tools

Edit Criteria Properties

Choose Expression 1 Type

☒ Field
 ☐ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname

Q

\*Condition Type

equal to

Choose Expression 2 Type

☐ Field
 ☐ Expression
 ☒ Constant
 ☐ Prompt
 ☐ Subquery

Expression 2

Define Constant

Constant

Q

OK

Cancel

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The **Select a field** window appears providing all the possible records and fields that are available within the query. Users may need to click on the Show Fields button to view available fields if the query has more than one record. Click the desired field to select it.

Select a field

Select a record to show fields for

Alias	Record	Record Description	Show Fields
A	SPEEDTYP_TBL	SpeedTypes	Show Fields

Select a field

1-29 of 29

View All

A.SETID - SetID

A.SPEEDTYPE\_KEY - SpeedType Key

A.OPRID - Operator Id

A.OPRCLASS - Primary Permission List

A.DESCR - Description

A.ACCOUNT - Account

A.ALTAECT - Alternate Account

A.DEPTID - Department

A.BUSINESS\_UNIT\_PC - PC Business Unit

A.PROJECT\_ID - Project

The chosen field appears under **Record Alias.FieldName**

Edit Criteria Properties

Choose Expression 1 Type

☒ Field

☐ Expression

Expression 1

Choose Record and Field

Record Alias.FieldName

A.DEPTID - Department

\*Condition Type

in list

Choose Expression 2 Type

☒ In List

☐ Subquery

Expression 2

Edit List

List Members

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## Condition Types

The following table describes the available condition types. For each of the condition types, Query Manager offers a “not” option that reverses its effect. For example, *not equal to* returns all rows that *equal to* would not return.

Condition Types	When It Returns a Row
between	The value in the selected record field falls between two comparison values. The range is inclusive.
equal to	The value in the selected record field exactly matches the comparison value.
exists	This condition is different from the others, in that it doesn’t compare a record field to the comparison value. The comparison value is a subquery. If the subquery returns any data, PeopleSoft Query returns the corresponding row.
greater than	The value in the record field is greater than the comparison value.
in list (see subquery section)	The value(s) in the selected record field matches the comparison value(s) in a list. The query will show the results of that match.
in tree	The value in the selected record field appears as a node in a tree created with PeopleSoft Tree Manager. The comparison value for this condition is a tree or branch of a tree PeopleSoft Query is to search.
is null	The selected record field doesn’t have a value in it. Don’t specify a comparison value for this condition. Key fields, required fields, character fields, and numeric fields do not allow null values.
less than	The value in the record field is less than the comparison value.
like	The value in the selected field matches a specified string pattern. The comparison value may be a string that contains wildcard characters. The wildcard characters that PeopleSoft Query recognizes are % and _. % matches any string of zero or more characters, i.e., C% matches any string starting with C, including C alone. _ matches any single character, i.e., ones matches any five-character string ending with ones, such as Jones or Cones.

### Condition Type: Equal To Example

In the screenshot below, using Field DEPID-Department from record A, **Condition Type:** equal to, we can select Field, Expression, Constant, Prompt, or Subquery to add a value to compare with Expression 1.

**Edit Criteria Properties**

**Choose Expression 1 Type**

☒ Field  
☐ Expression

**Expression 1**

**Choose Record and Field**

Record Alias.Fieldname  
A.DEPTID - Department

\*Condition Type: equal to

**Choose Expression 2 Type**

☐ Field  
☐ Expression  
☒ Constant  
☐ Prompt  
☐ Subquery

**Expression 2**

**Define Constant**

Constant: 110100000

OK Cancel

### Condition Type: In Tree Example

**Condition Type** “in tree”: Enables a hierarchical tree to be chosen, and within the tree, the nodes containing specific values. *In Tree* is used to return the records that match or appear in the specified tree.

Some of the most commonly used trees at FIU are:

- ACCOUNTROLLUP
- ACTIVITY\_HIERARCHY
- DEPT\_ROLLUP
- STUFINANCIALS – Student Financials in Campus Solutions

**In Tree** can be used to answer questions such as: What are all the Travel Authorizations within the College of Medicine? Criteria could be added using “in tree” instead of having to list every department number.

Follow the steps to use **Condition Type** “in tree”:

1. After clicking **Add New Criteria**, choose **Expression 1 Type: Field**, **Choose Record and Field:** A.DEPTID-Department, select the “in tree” **Condition Type**.
2. Choose Tree Option under **Choose Expression 2 Type** and click the [New Node List](#) link under **Select Tree Node List** to display the Select Tree page.



### Edit Criteria Properties

**Choose Expression 1 Type**

☒ Field  
☐ Expression

**Expression 1**

**Choose Record and Field**

Record Alias.FieldName  
A.DEPTID - Department

\*Condition Type in tree

**Choose Expression 2 Type**

☒ Tree Option  
☐ Tree Prompt Option

**Expression 2**

**Select Tree Node List**

Node List

☐ Display Detail Values [New Node List](#)

OK Cancel

- Click on Search or type in the Tree name. **Only trees to which a user has been granted access will be listed.** Click the name of the desired tree.

### Select a Tree

Tree Name contains

Tree Name	SetID	SetControlValue	Effective Date	Description	Saved As
DEPT_HIERARCHY_CIV	FIU01		07/03/2006	Department Hierarchy Civil	Valid Tree
DEPT_ROLLUP_HR	FIU01		06/01/2012	Dept Rollup to Org with PID	Valid Tree
DEPT_ROLLUP	FIU01		12/01/2011	Dept Detail Rollup to Org	Valid Tree
DEPT_ROLLUP_HR_OLD	FIU01		01/01/1900	Dept Detail Rollup to Org Old	Valid Tree
DEPT_ROLLUP_HR	FIU01		07/01/2011	Dept Detail Rollup to Org	Valid Tree
DEPT_ROLLUP_HR	FIU01		03/14/2012	Dept Detail Rollup to Org	Valid Tree
DEPT_HIERARCHY_OLD	FIU01		01/01/1900	Department Hierarchy	Valid Tree
DEPT_ROLLUP_OLD	FIU01		12/01/2011	Dept Detail Rollup to Org	Valid Tree
DEPT_ROLLUP_HR	FIU01		05/01/2012	Dept Rollup to Org with PID	Valid Tree
DEPT_ORG	FIU01		06/30/2011	Dept Org	Valid Tree
DEPT_ROLLUP_HR	FIU01		03/28/2012	Dept Rollup to Org Newest Vrsn	Valid Tree
DEPT_91_ADV	FIU01		07/03/2006	Department Hierarchy 91_ADV	Valid Tree
DEPT_HIERARCHY	FIU01		07/03/2006	Department Hierarchy	Valid Tree
CC_DEPT_SECURITY	FIU01		12/11/2003	CC Department Security	Valid Tree
DEPT_HIERARCHY_ASU	FIU01		07/03/2006	Department Hierarchy	Valid Tree
DEPT_HIERARCHY	FIU01		01/01/1900	Department Hierarchy	Valid Tree
DEPT_HIERARCHY	FIU01		02/08/2006	Department Hierarchy	Valid Tree
DEPT_HIERARCHY_ADH	FIU01		01/01/1900	Department Hierarchy	Valid Tree
DEPT_ROLLUP_HR	FIU01		04/29/2012	Dept Rollup to Org Newest Vrsn	Valid Tree
DEPT_HIERARCHY_ADH	FIU01		07/03/2006	Department Hierarchy	Valid Tree
DEPT_HIERARCHY_PIC	FIU01		01/01/1900	Dept Hierarchy Pico	Valid Tree
DEPT_HIERA_071905	FIU01		01/01/1900	Department Hierarchy	Valid Tree
DEPT_HIERARCHY_03	FIU03		01/01/1900	Department Hierarchy FIU03	Valid Tree

Cancel

4. Click the **Add to Node Selection List** icon to select the Node. Folders may be expandable as well as users can use the expand hierarchy icon if displayed.

**Display and Select TreeNodes**


SetID FIU01 Effective Date 06/30/2011  
Tree Name DEPT\_ORG

▶ **Selected Nodes List**

▶ **Manual Selection**

[ALL\\_DEPTS](#) > [ACADEMIC\\_AFFAIRS](#) > [COLL\\_OF\\_MEDICINE](#)

[Collapse All](#) | [Expand All](#) [Find](#) First Page 22 of 94 Last Page

- ALL\_DEPTS - All Departments
  - ACADEMIC\_AFFAIRS - Academic Affairs
    - ENGAGEMENT - Office of Engagement
    - UNIVERSITY\_COLLEGE - University College
    - UNIVERSITY\_TECH - Division of IT
    - RESEARCH\_GRADSCHOOL - Research & Economic Devel.
    - PROVOST - Provost Office
    - ENROLL\_SVS\_FIN\_AID - Enrollment Svcs & Fin Aid
    - COLL\_OF\_NURSING - Nursing & Health Science
    - COLL\_OF\_MEDICINE - College of Medicine** 
    - ENG\_COMP\_SCIENCE - Engineering & Computer Science
    - EDUCATION - School of Educ & Human Dev
    - CBA - College of Business Admin
    - ARTSCIENCE - Arts, Sciences & Education
    - ACADMC\_AFFRS\_SCHLS - Academic Affairs-Schools
    - ACADEMIC\_AFFRS3 - Academic Affairs
    - STUDENT\_AFFAIRS - Div of Student Affairs
    - DIV\_OF\_FINANCE - Division of Finance
    - ADV\_EXT\_RELATIONS - Advmnt & External Relations
    - GOVERNMENT\_RELATIONS - Governmental Relations
    - GENERAL\_COUNSEL - Office of the General Counsel
    - PRESIDENT - President's Executive Area




[Collapse All](#) | [Expand All](#) [Find](#) First Page 22 of 94 Last Page

Users can remove nodes from the list by clicking the **Remove from List** icon. To display the selected tree branch, click the **Find** icon.

**Display and Select TreeNodes**

SetID FIU01 Effective Date 06/30/2011  
Tree Name DEPT\_ORG



▼ **Selected Nodes List**

 COLL\_OF\_MEDICINE - College of Medicine  

▶ **Manual Selection**

[ALL\\_DEPTS](#) > [ACADEMIC\\_AFFAIRS](#) > [COLL\\_OF\\_MEDICINE](#)

[Collapse All](#) | [Expand All](#) [Find](#) First Page 22 of 94 Last Page

- ALL\_DEPTS - All Departments
  - ACADEMIC\_AFFAIRS - Academic Affairs
    - ENGAGEMENT - Office of Engagement
    - UNIVERSITY\_COLLEGE - University College
    - UNIVERSITY\_TECH - Division of IT
    - RESEARCH\_GRADSCHOOL - Research & Economic Devel.
    - PROVOST - Provost Office
    - ENROLL\_SVS\_FIN\_AID - Enrollment Svcs & Fin Aid
    - COLL\_OF\_NURSING - Nursing & Health Science
    - COLL\_OF\_MEDICINE - College of Medicine**  
    - ENG\_COMP\_SCIENCE - Engineering & Computer Science
    - EDUCATION - School of Educ & Human Dev

5. Scroll to the bottom of the page and click **OK**. The selected tree SetID, tree name, effective date, and selected nodes appear in the Select Tree dialog box.

**Edit Criteria Properties**

**Choose Expression 1**  
Type  
☒ Field  
☐ Expression

**Expression 1**  
**Choose Record and Field**  
Record Alias.Fieldname  
A.DEPTID - Department

\*Condition Type in tree

**Choose Expression 2**  
Type  
☒ Tree Option  
☐ Tree Prompt Option

**Expression 2**  
**Select Tree Node List**  
Node List FIU01,DEPT\_ORG,2011-06-30,COLL\_OF\_MEDICINE  
☐ Display Detail Values [New Node List](#) [Edit Node List](#)

OK Cancel

## Understanding Effective Dates

Effective dates keep history, current, and future information in tables. The system categorizes effective-dated rows into three basic types:

<i>Future</i>	Data rows that have effective dates greater than the system date—usually today's date. There can be more than one.
<i>Current</i>	The data row with the greatest effective date less than or equal to today's (system) date. Only one row is the current row.
<i>History</i>	Data rows that have effective dates less than the effective date of the current data row. There can be more than one.

When adding data with effective dates, the query defaults to *currently effective* rows of data—the row where the effective date is less than or equal to today's date. The query may not need to see the historic rows, which are no longer accurate, or future-dated rows, which aren't in effect yet.

An effective date criteria has been automatically added for this effective dated record. (139,60)

OK

### To specify effective date criteria:

1. When you choose the record that has EFFDT as a key field, Query Manager automatically creates default criteria and adds that criteria to the Criteria page.

Query Manager

Criteria

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Query Name: New Unsaved Query Description: Feed

Add Criteria Group Criteria

Criteria

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.EFFDT - Effective Date	Eff Date <=	Current Date	Edit	—

Save Save As New Query Preferences Properties

Publish as Feed Publish as Pivot Grid New Union

Return To Search

Edit Criteria Properties

Choose Expression 1 Type

☒ Field  
☐ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname

A.EFFDT - Effective Date

\*Condition Type: Eff Date <=

Choose Expression 2 Type

☐ Field  
☐ Expression  
☐ Constant  
☒ Current Date

OK Cancel

- If you choose one of the comparison options, choose to compare each row's effective date against today's date.
- Select *Current Date* to compare each row's effective date against today's date.
  - Select *Constant* to display the Constant box so that you can enter a date.  
Select this option when you want to see the rows that were effective as of a past date or that will be effective on a future date.
  - Select *Expression* to display the Edit Expression box so that you can enter a SQL expression that evaluates the date entered.  
Select this option if you want to prompt users for an effective date when they run the query. You can add a prompt to the expression you define in the Edit Expression box.
  - Select *Field* to display the Select Field box so that you can select the record field that holds the date to which you want to compare effective dates.  
Select this option when you want to see the rows that were effective at the same time as another record. For example, if you're reviewing the list of products on a customer order, you'll want to see the products that were effective on the date of the order.
  - Select *First Effective Date* to return the row with the oldest effective date, usually the first row entered for an item.
  - Select *Last Effective Date* to return the row with the latest effective date, even if that date is still in the future.

## Prompts Tab

A run-time prompt allows values to be entered for a specific field at the time the query is run. This acts as a criterion. The query will display only those rows of information that match the value entered in the prompt.

1. Prompts can be created from the **Add Criteria** icon associated with a field on the **Field or Query** Tab. Another way to create a prompt is from the **Criteria** Tab. Click the **Add Criteria** button and choose the field with which the prompt will be associated.

The screenshot shows the 'Query Tools' interface with the 'Criteria' tab selected. The 'Add Criteria' button is highlighted with a red box. Below the buttons, the 'Criteria' section shows a table with one criterion: 'ADEPTID - Department' with a condition type of 'in tree'. The 'Expression 2' field contains the text 'FIU01,DEPT\_ORG.2011-06-30,COLL\_OF\_MEDICINE'. The 'Edit' button is also visible.

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
<input type="checkbox"/>	ADEPTID - Department	in tree	FIU01,DEPT_ORG.2011-06-30,COLL_OF_MEDICINE	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

The 'Edit Criteria Properties' dialog box is shown. It has two main sections: 'Choose Expression 1 Type' and 'Choose Expression 2 Type'. In the 'Choose Expression 1 Type' section, 'Field' is selected. In the 'Choose Expression 2 Type' section, 'Constant' is selected. The 'Expression 1' section shows a search box with 'ADEPTID - Department' selected. The 'Expression 2' section shows a search box with 'Constant' entered. The 'Condition Type' is set to 'equal to'.

**Edit Criteria Properties**

**Choose Expression 1 Type**

☒ Field  
☐ Expression

**Expression 1**

**Choose Record and Field**

Record Alias.Fieldname  
ADEPTID - Department

**\*Condition Type** equal to

**Choose Expression 2 Type**

☐ Field  
☐ Expression  
☒ Constant  
☐ Prompt  
☐ Subquery

**Expression 2**

**Define Constant**

Constant

OK Cancel

- From the **Choose Expression 2 Type** box, select **Prompt**.

**Edit Criteria Properties**

**Choose Expression 1 Type**

☒ Field  
☐ Expression

**Expression 1**

**Choose Record and Field**

Record Alias.Fieldname  
A.DEPTID - Department

\*Condition Type equal to

**Choose Expression 2 Type**

☐ Field  
☐ Expression  
☐ Constant  
☒ Prompt  
☐ Subquery

**Expression 2**

**Define Prompt**

Prompt [New Prompt](#) [Edit Prompt](#)

OK Cancel

- In the **Define Prompt** box, click the [New Prompt](#) link.

**Edit Criteria Properties**

**Choose Expression 1 Type**

☒ Field  
☐ Expression

**Expression 1**

**Choose Record and Field**

Record Alias.Fieldname  
A.DEPTID - Department

\*Condition Type equal to

**Choose Expression 2 Type**

☐ Field  
☐ Expression  
☐ Constant  
☒ Prompt  
☐ Subquery

**Expression 2**

**Define Prompt**

Prompt [New Prompt](#) [Edit Prompt](#)

OK Cancel

The **Edit Prompt Properties** window appears. PeopleSoft Query looks to the record definition for information about the field chosen and completes the rest of the dialog box based on its properties. There are basic properties about how the prompted field will display, which can be changed. This includes the **Heading Type**, **Type**, **Heading Text**, **Format**.

**Heading Type:** RFT Short, RFT Long, or text options are available.

**Type:** This indicates what kind of field was chosen.

**Heading Text:** Where the name of the prompted field can be changed.

**Unique Prompt Name** A default value generated by Query Manager for globalization.

**Edit Prompt Properties**

Field Name:

\*Heading Type:

\*Type:

\*Format:

Length:

Decimals:

\*Unique Prompt Name:

\*Edit Type:

Prompt Table:

☐ Optional

Default Value:

By default, prompts use the **Edit Type** *Prompt Table*. The system will then use a prompt table to choose values based on the field. Under **Prompt Table**, the name of a table will display. If the **Edit Type** is *Translate Table*, the value in the list box determines the values used. The **Edit Type** *No Table Edit* will allow the user running the query to enter manually any value.

Use the drop-down **Edit Type** and choose *No Table Edit*. Click the search glass icon under **Prompt Table** and select or confirm **No Value**.

### Edit Prompt Properties

Field Name

\*Heading Type

\*Type

Heading Text

\*Format

\*Unique Prompt Name

Length

Decimals

\*Edit Type

Prompt Table

### Edit Prompt Properties

Field Name

\*Heading Type

\*Type

Heading Text

\*Format

\*Unique Prompt Name

Length

Decimals

### Select a Prompt Table

Search by

Click **OK** to exit and then **OK** again to confirm the choices.

Prompts are viewable as criteria under the **Criteria** Tab indicated by the symbol “:1”. The number depends on the order of the prompts.



Query Tools

Records

Query

Expressions

Prompts

Fields

Criteria

Having

View SQL

Run

Query Name

FIU\_FSSS\_SPEEDTYPE\_OY

Description

Athletics Speedtypes

Feed

Add Criteria

Group Criteria

Reorder Criteria

Criteria

1-2 of 2

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.DEPTID - Department	in tree	FIU01,,DEPT_ORG,2011-06-30,COLL_OF_MEDICINE	Edit	—
AND	A.DEPTID - Department	equal to	:1	Edit	—

Save

Save As

New Query

Preferences

Properties

Publish as Feed

Publish as Pivot Grid

New Union

Return To Search

Prompts are also viewable under the **Prompt** Tab. They can be fully edited and deleted there.

Query Tools

Records

Query

Expressions

Prompts

Fields

Criteria

Having

View SQL

Run

Query Name

FIU\_FSSS\_SPEEDTYPE\_OY

Description

Athletics Speedtypes

Add Prompt

Prompts List

1-1 of 1

Prompt	Edit	Delete
:1 = DEPTID - Dept	Edit	—

Save

Save As

New Query

Preferences

Properties

Publish as Feed

Publish as Pivot Grid

New Union

Return To Search

## Run Tab

To process the query and view the results, click the **Run** Tab. Results will display below the tabs. There are also options to View All, Rerun Query, and Download to Excel. FIU does not utilize Download to XML.

**View All:** Click this link to view all rows and use scroll bar to navigate.

**Rerun Query:** Click this link to rerun your query in the preview pane. If any changes were made to the query since the last preview, the query must be rerun to see the effect of the changes.

**Download to Excel:** Click this link to download the query to Excel.

Query Tools								
Records	Query	Expressions	Prompts	Fields	Criteria	Having	View SQL	Run
<a href="#">View All</a>   <a href="#">Rerun Query</a>   <a href="#">Download to Excel</a>   <a href="#">Download to XML</a> <span style="float: right;">First 1-100 of 768 Last</span>								
Row	SetID	SpeedType	Operator	Descr	Dept	Fund	Program	Activity Nbr
1	FIU01	800002086		Polydrug Nanocarrier to Treat	340008000	660	22	
2	FIU01	800001568		NeighborhoodHELP Medical Home	310000000	665	22	
3	FIU01	341000500		Role of Y Chromosomal Genes in	340006000	661	22	
4	FIU01	341000501		Genetic Basis of Testicular De	340006000	661	22	
5	FIU01	122000503		AIDS Encephalopathy and HIV Di	340008000	661	22	
6	FIU01	122000500		Cocaine in the Immuno and Neur	340008000	661	22	
7	FIU01	122000502		Heroin-AIDS Encephalopathy: Ne	340008000	661	22	
8	FIU01	122000501		Immunogenesis of HIV-1 Infecti	340008000	661	22	
9	FIU01	312000500		Liver Cancer Research	312000000	665	22	
10	FIU01	340000501		Mechanisms of Arsenical Transp	340005000	661	22	
11	FIU01	128000500		Role of Cocaine in Neuro-AIDS	340008000	661	22	
12	FIU01	342000500		Metalloid Transport and Drug R	340007000	661	22	
13	FIU01	2400350901		A & D Tano Medical Simul Ctr E	301000000	901	00	
14	FIU01	2400360901		Neuro Endocrine Immune Ctr End	300001000	901	00	
15	FIU01	2400360903		Neuro Endocrine Immune Ctr End	300001000	903	00	

## Validating Query Results

A query is defined as a request for information from a database. The queries and query types mentioned in this manual are **'select'** queries; select queries are data retrieval queries. When data is retrieved and results are displayed, the results should be validated.

While there is no defined step-by-step method of validation, there are a few things that a user can do to determine if the results are accurate.

Some helpful validation tips:

- **Some queries should not have results but there are results:** this may mean that a process may need to be run for the query not to have any results, i.e., running Budget Checking, Voucher Posting, Payment Posting, Combo Build, Journal Edit.

- **Some queries result in an error:** A correction is needed to clear the results of the query. After correcting the error, re-run the query, and it should yield different or no results, i.e., correcting a Journal Entry that is in error status and changing the status to 'Valid'.
- Reconcile data in a query with standard reports. User nVision reports to confirm data, i.e., AP-Voucher Reports.
- If planning to combine two tables, run each table separately, for one department or an account, then filter in Excel or use a v-lookup function to compare the two. Run the query and then estimate how many rows to expect, and make sure that is what results after combining the tables.
- Use one chartfield and follow it through the queries. When joining new tables, make sure all the data is there and nothing is missing, i.e., same number of rows. Check which lines are missing and validate that the query is correct to exclude those lines.
- Validate some transactions from query results comparing them with what is in PeopleSoft menus or view pages, making sure the fields match, for example that the PO line is open.
- Use the Show Fields option.
- Check all the fields and see what the output is by running the query.
  - Which fields display data?
  - What data is displayed?
- Look at the Criteria, Records, and SQL language of another query that might do the same thing but with different documents.

## Working with Multiple Records and Data

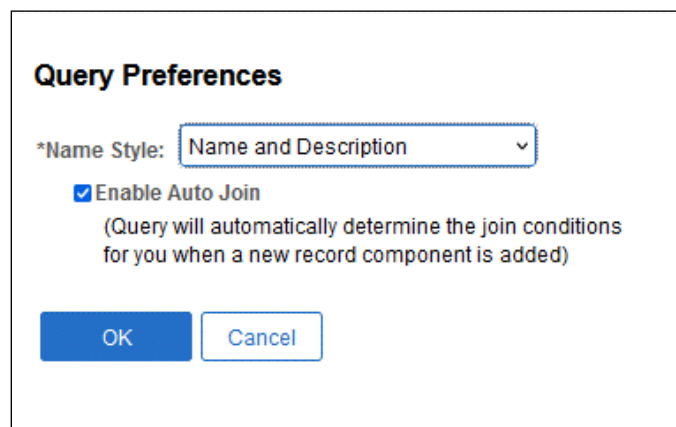
In many cases, the desired output data comes from more than one table or record of data. The tables must be linked together to retrieve the correct output or at least added/joined to the query.

PeopleSoft Query allows queries created to include multiple tables joins. Joins allow data to be retrieved from more than one underlying table, presenting the data as if it came from one. When joins are completed, the records involved are linked based on common fields. The process for joining tables differs depending on how the tables being joined are related to each other. PeopleSoft Query recognizes four types of joins:

- **Record Hierarchy Join**, which joins a parent table to a child table. (A child table is a table that uses all the same key fields as its parent, plus one or more additional keys).
- **Related Record Join**, which joins records from non-hierarchical records that are related by common fields. For example, description tables for common codes are related records.
- **Any Record Join (Standard Inner Join)**, which joins any two tables in the database.
- **Left Outer Join**, which joins any two tables in the database similar to an 'Any Record Join'. However, in a left outer join, all rows of the first (left) record are present in the result set, even if there are no matches in the joining record.

In Query, predefined joins can be generated as a *Record Hierarchy Join* or a *Related Record Join*. Since these types of joins are predefined, **no criteria are needed to manually link the records**.

The Auto Join Wizard should be enabled in Query Preferences. PeopleSoft Query automatically attempts to join the new record to the existing record by looking for matching columns on the two records when *Any Record Join* or *Left Outer Join* are attempted.



The image shows a 'Query Preferences' dialog box. It has a title bar with the text 'Query Preferences'. Inside the dialog, there is a label '\*Name Style:' followed by a dropdown menu showing 'Name and Description'. Below this, there is a checked checkbox labeled 'Enable Auto Join'. Underneath the checkbox, there is a line of text in parentheses: '(Query will automatically determine the join conditions for you when a new record component is added)'. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

## Record Hierarchy Join

A record hierarchy joins a parent table to a child table. (A *child table* is a table that uses all the same key fields as its parent, plus one or more additional key fields.)

### To create a Record Hierarchy Join:

1. From the **Query Tab**, choose the base record for the query and click the [Hierarchy Join](#) link to the right of the base record.

Query Tools

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

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	EX_EE_AUTH_TBL - Employee Authority
B	PO_HDR - Purchase Order Header

Check All Uncheck All

Fields

1-50 of 97 View All

<input type="checkbox"/>	BUSINESS_UNIT - Business Unit	
<input type="checkbox"/>	PO_ID - PO Number	
<input type="checkbox"/>	CHNG_ORD_BATCH - Change Order Number	
<input type="checkbox"/>	PO_TYPE - PO Type	
<input type="checkbox"/>	PO_STATUS - PO Status	
<input type="checkbox"/>	HOLD_STATUS - Hold From Further Processing	

All the records that have a parent/child relationship with the selected base record appear. Click the name of the table listed that should be joined.

Select record for hierarchy join

Left | Right

PO\_HDR - Purchase Order Header

PO\_ER\_LINE - PO Expected Receipts Lines

PO\_LINE - Purchase Order Line Item

Cancel

At this point, any field can be selected from either table into one query.

Records

Query

Expressions

Prompts

Fields

Criteria

Having

View SQL

Run

Query Name

New Unsaved Query

Description

Feed

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	EX_EE_AUTH_TBL - Employee Authority	<a href="#">Hierarchy Join</a> —
B	PO_HDR - Purchase Order Header	<a href="#">Hierarchy Join</a> —
C	PO_LINE - Purchase Order Line Item joined with B	<a href="#">Hierarchy Join</a> —

Check All

Uncheck All

Fields

|

1-50 of 64

[View All](#)

☐

BUSINESS\_UNIT - Business Unit

☐

PO\_ID - PO Number

☐

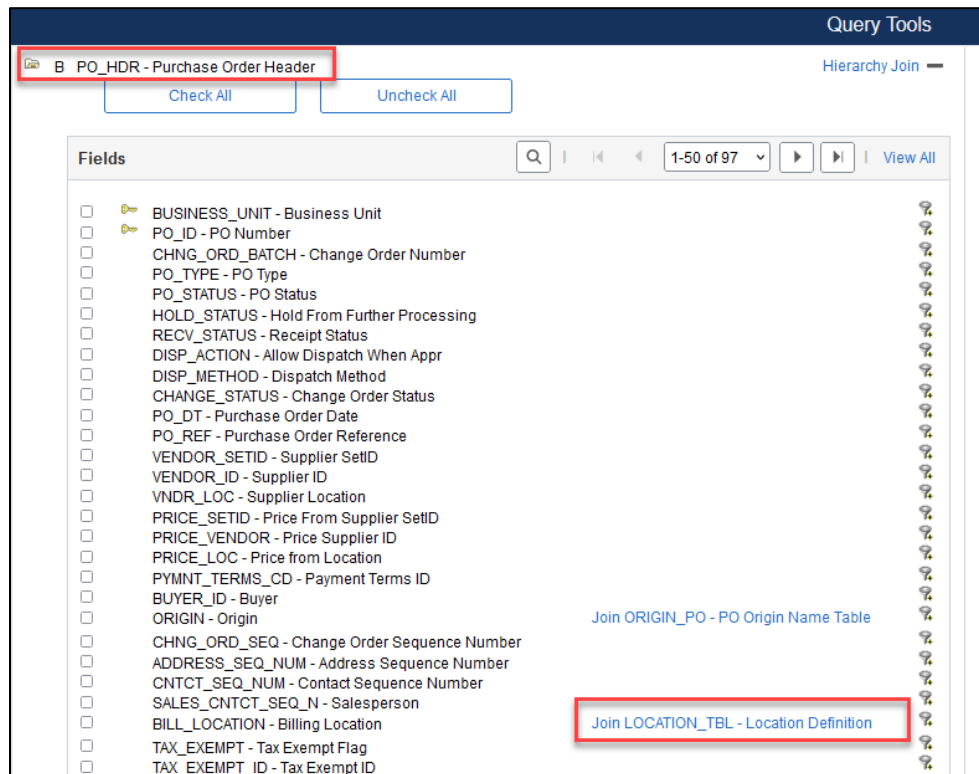
LINE\_NBR - Line Number

## Related Record Join

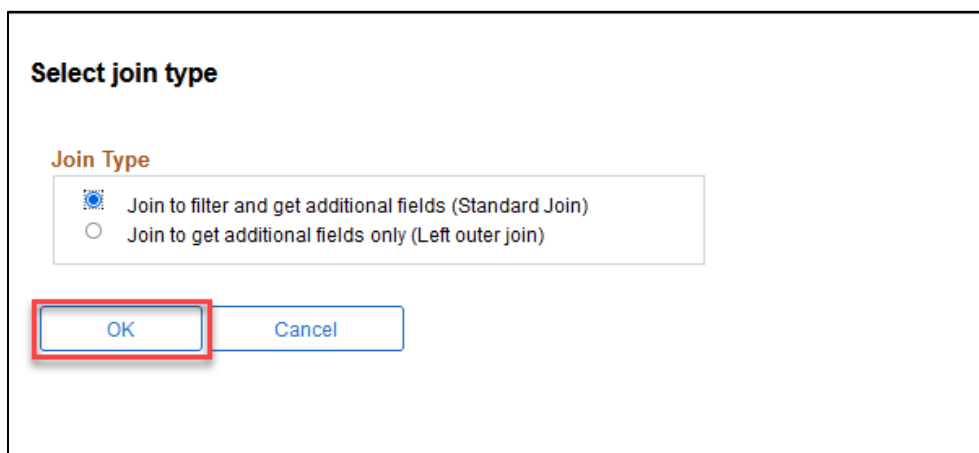
In a related record join, two tables are joined based on a shared field that *isn't necessarily a key field*. For example, if a field has a prompt table defined for it, then PeopleSoft Query displays a join link to the right of the shared field.

### To create a related record join:

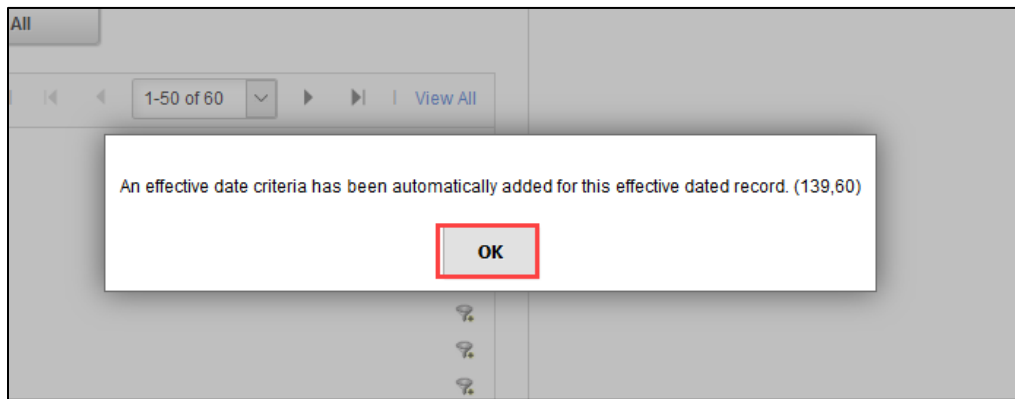
1. From the **Query** tab, choose the base record for the query and click the required *Related Record Join* link.



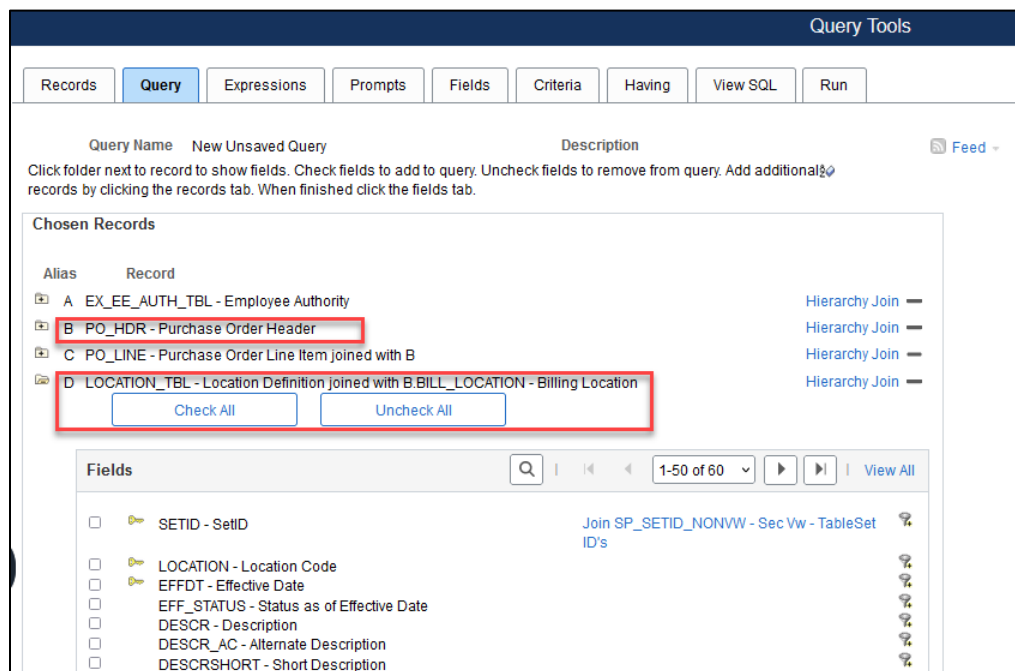
2. Select Standard Join and click **OK**.



Effective data criteria will be added, click **OK**.



The join is reflected on the Query Tab with the added record.



## Standard Join

The Standard Join is typically used when the names of the records that should be joined are known. This join is also used when our query requires additional information and there is no need to retain the original results. In other words, the standard join filters and add fields to the query. Using Query Manager, a join will be created between two records by adding the initial base record, selecting fields, defining criteria, and then returning to the Record tab to select the second record.

### To create any record join:

1. Choose the base record for the query and select the appropriate fields and criteria.
2. Return to the Record page to select the second record. The Auto Join Wizard will attempt to join the new record to the existing record by finding matching fields between the two tables.

In this Standard Join example, we are going to join the REQ\_HDR table and the PO\_LINE\_DISTRIB table to see all the Requisitions that have sourced to a Purchase Order.



## Standard Join Example

**Business Question:** What are all the requisitions that have sourced to a Purchase Order between 02/15/2023 and 02/28/2023?

1. Main Menu>Reporting Database>Query Tools>Query Manager
2. Click Create a New Query
3. Search for and add **REQ\_HDR** record

The screenshot shows the 'Query Tools' window with the 'Records' tab selected. The 'Query Name' is 'New Unsavd Query'. The search criteria are set to 'Record Name' and 'begins with' 'REQ\_HDR'. The 'Search' button is highlighted with a red box. Below the search bar, the 'Search Results' section shows a table with one record: 'REQ\_HDR - Requisition Header'. The 'Add Record' button is highlighted with a red box. At the bottom, there are buttons for 'Save', 'Save As', 'New Query', 'Preferences', 'Properties', 'Publish as Feed', 'Publish as Pivot Grid', 'New Union', and a 'Return To Search' button.

4. Select the REQ\_ID field and click funnel shape next to ENTERED\_DT field to add criteria without selecting the field.

The screenshot shows the 'Query Tools' window with the 'Query' tab selected. The 'Query Name' is 'FIU\_FSSS\_LF\_JOINS' and the 'Description' is 'Standard Join Example'. The 'Chosen Records' section shows a table with one record: 'REQ\_HDR - Requisition Header'. The 'Fields' section shows a list of fields with checkboxes. The 'REQ\_ID' field is selected with a red box. The 'ENTERED\_DT' field has a funnel icon next to it, which is also highlighted with a red box. The 'Fields' section also includes a search bar and a 'View All' button.

5. Change the condition type to “between”  
\*Verify Expression 2 Type Box indicates “Const-Const”
6. Enter “02/15/2023” in the first date box
7. Enter “02/28/2023” in the second date box

**Edit Criteria Properties**

**Choose Expression 1 Type**

☒ Field  
☐ Expression

**Expression 1**

**Choose Record and Field**

Record Alias.Fieldname  
A. ENTERED\_DT - Entered on

\*Condition Type: between

**Choose Expression 2 Type**

☒ Const - Const  
☐ Const - Field  
☐ Const - Expr  
☐ Field - Const  
☐ Field - Field  
☐ Field - Expr  
☐ Expr - Const  
☐ Expr - Field  
☐ Expr - Expr

**Expression 2**

**Define Constant**

\*Date 02/15/2023

**Define Constant 2**

\*Date 2 02/28/2023

OK Cancel

8. Click OK
9. Click Save

## 10. Click Run

When we first ran the query with the date criteria on the REQ\_HDR record by itself, we received 764 results. These results show all Requisitions entered between our date parameters.

Query Tools		
Records	Query	Expressions
Prompts	Fields	Criteria
Having	View SQL	Run

View All | Rerun Query | Download to Excel | Download to XML

First 1-100 of 764 Last

Row	Req ID	Entered
1	0000281903	02/22/2023
2	0000281928	02/22/2023
3	0000281967	02/22/2023
4	0000281612	02/15/2023
5	0000282281	02/28/2023
6	0000282283	02/28/2023
7	0000281618	02/16/2023
8	0000281626	02/16/2023
9	0000281922	02/22/2023
10	0000281952	02/22/2023
11	0000281542	02/15/2023
12	0000281581	02/15/2023
13	0000281845	02/21/2023
14	0000281610	02/15/2023
15	0000281770	02/20/2023
16	0000281772	02/20/2023
17	0000281782	02/20/2023
18	0000281787	02/20/2023
19	0000282022	02/23/2023
20	0000282030	02/23/2023

Create a STANDARD JOIN with the PO\_LINE\_DISTRIB table to find all the requisitions that sourced to PO. The two tables will link at Business Unit, and REQ\_ID, and we will select the PO\_ID field from the PO\_LINE\_DISTRIB. The system will bring back the data that matches Req ID and a PO ID. If there is no PO number, the Requisition number will not show.

## 11. Click on the Records tab

## 12. Search for PO\_\_LINE\_DISTRIB

\*By selecting show fields next to the PO\_LINE\_DISTRIB record, user can see that there is a PO\_ID and REQ\_ID field.

13. Click Join Record

Query Tools

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Query Name FIU\_FSSS\_LF\_JOINS Description Standard Join Example

\*Search By Record Name begins with PO\_LINE\_DISTRIB

Search Advanced Search

Search Results

Record

Recname	Join Record	Show Fields
PO_LINE_DISTRIB - PO Line Accounting Entries	Join Record	Show Fields

Save Save As New Query Preferences Properties

Publish as Feed Publish as Pivot Grid New Union

Return To Search

14. System defaults to Standard Join

15. Click the A= REQ\_HDR-Requisition Header record link.

Select join type and then record to join with PO\_LINE\_DISTRIB - PO Line Accounting Entries.

Join Type

☒ Join to filter and get additional fields (Standard Join)

☐ Join to get additional fields only (Left outer join)

Join Record

A = REQ\_HDR - Requisition Header

Cancel

The system shows that the two records are going to join at Business Unit and Requisition ID and bring the results from the additional field(s) selected, which in this case will be PO\_ID.

Results will show all Requisitions that have PO IDs associated. Those requisitions that do not, will be filtered out. (Join to filter and get additional fields)

**Auto Join Criteria**

Query has detected the join conditions shown below.  
Use the checkboxes to unselect the criteria that you do not want to add to the query and click add criteria when done. The criteria added can always be modified later using the criteria tab.

<input checked="" type="checkbox"/>	A.BUSINESS_UNIT - Business Unit = B.BUSINESS_UNIT - Business Unit
<input checked="" type="checkbox"/>	A.REQ_ID - Requisition ID = B.REQ_ID - Requisition ID

**Add Criteria** **Cancel**

16. Click Add Criteria

17. Choose the PO ID from Record B

**Query Tools**

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

Query Name FIU\_FSSS\_LF\_JOINS Description Standard Join Example

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	REQ_HDR - Requisition Header	Hierarchy Join
B	PO_LINE_DISTRIB - PO Line Accounting Entries	Hierarchy Join

**Check All** **Uncheck All**

**Fields**  | 1-50 of 135 **View 100**

<input type="checkbox"/>	BUSINESS_UNIT - Business Unit	
<input checked="" type="checkbox"/>	PO_ID - PO Number	
<input type="checkbox"/>	LINE_NBR - Line Number	
<input type="checkbox"/>	SCHED_NBR - Schedule Number	
<input type="checkbox"/>	DST_ACCT_TYPE - Accounting Entry Type	
<input type="checkbox"/>	DISTRIB_LINE_NUM - Distribution Line	
<input type="checkbox"/>	QTY_PO - Purchase Order Quantity	
<input type="checkbox"/>	CURRENCY_CD - Currency Code	
<input type="checkbox"/>	MERCHANDISE_AMT - Merchandise Amount	
<input type="checkbox"/>	CURRENCY_CD_BASE - Business Unit Base Currency	
<input type="checkbox"/>	MERCH_AMT_BSE - Merchandise Amount Base	
<input type="checkbox"/>	LOCATION - Location Code	

Join LOCATION\_TBL - Location Definition

18. Click Save

19. Click Run

Performing the Standard Join yields 1969 results. All these results have PO#s. Now we notice that there is repetition. The same req# is repeated with the same PO# because we used the PO\_LINE\_DISTRIB record, and the results are by line. If the requisition has multiple lines, the results repeat the PO# according to that # of lines.

Query Tools		
Records	Query	Expressions
Prompts	Fields	Criteria
Having	View SQL	Run

View All | Rerun Query | Download to Excel | Download to XML

First 1-100 of 1989 Last

Row	Req ID	PO No.
1	0000282021	0000246417
2	0000281562	0000188578
3	0000281896	0000193149
4	0000282154	0000201074
5	0000282173	0000201978
6	0000281668	0000238969
7	0000281649	0000242481
8	0000282158	0000243912
9	0000282158	0000243912
10	0000282086	0000244169
11	0000282086	0000244169
12	0000282086	0000244169
13	0000282086	0000244169
14	0000282086	0000244169
15	0000282086	0000244169
16	0000282086	0000244169
17	0000281911	0000244281

We are going to use **Distinct** to get rid of the duplicates. The distinct feature is intuitive enough to not remove the duplicate requisitions that have sourced to *different* PO#s.

### Using Distinct

20. Click any tab except Run
21. Click the Properties link at the bottom of the page

Query Tools		
Records	Query	Expressions
Prompts	Fields	Criteria
Having	View SQL	Run

Query Name FIU\_FSSS\_LF\_JOINS Description Standard Join Example [Feed](#)

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

**Criteria**

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
<input type="text"/>	A. ENTERED_DT - Entered on	between	2023-02-15 AND 2023-03-28	<a href="#">Edit</a>	—
AND	A.BUSINESS_UNIT - Business Unit	equal to	B.BUSINESS_UNIT - Business Unit	<a href="#">Edit</a>	—
AND	A.REQ_ID - Requisition ID	equal to	B.REQ_ID - Requisition ID	<a href="#">Edit</a>	—

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

[Publish as Feed](#) [Publish as Pivot Grid](#) [New Union](#) [Edit Query Properties](#)

[Return To Search](#)

22. Check off the Distinct Box

23. Click OK

Query Properties

\*Query

FIU\_FSSS\_LF\_JOINS

Description

Standard Join Example

Folder

\*Query Type

User

\*Owner

Private

☒ Distinct

☐ Security Join Optimizer

Query Definition

Image Fields

☒ Blank Value

☐ Image Data

☐ Image Hyperlink

Last Updated Date/Time

03/01/2023 2:41:13PM

Last Update User ID

2216854

OK

Cancel

24. Click Save

25. Click Run

When we run the results again, the results decrease to 815 due to no duplicates.

Query Tools		
Records	Query	Expressions
Prompts	Fields	Criteria
Having	View SQL	Run
View All   Rerun Query   Download to Excel   Download to XML		
First 1-100 of 697 Last		
Row	Req ID	PO No.
1	0000281567	0000247489
2	0000281830	0000248676
3	0000282026	0000249301
4	0000282029	0000249310
5	0000281763	0000254136
6	0000281778	0000254150
7	0000281752	0000254151
8	0000281946	0000254530
9	0000282215	0000254531
10	0000282199	0000254536
11	0000282224	0000254548
12	0000281995	0000254554
84	0000281736	0000254128
85	0000281736	0000254134
86	0000281754	0000254138
87	0000281764	0000254140
88	0000281683	0000254152

## Left Outer Join

In a Left Outer Join, all rows of the first (left) record are present in the result set **even if there are no matches in the joining record**. This allows the integrity of the data from the first table though none of those records exist in the secondary tables that are being joined. **A left outer join will not filter any rows when the query is run.**

### To create left outer joins:

1. Choose the base record for the query and select the appropriate fields and criteria.
2. Return to the Record page to select the second record. Also, select a Related Record Join Link. The Auto Join Wizard will attempt to join the new record to the existing record by finding matching fields between the two tables.
3. Click the Join Record link on the same row as the joining record.
4. Select Join to get additional fields only (Left outer join).

### Left Outer Join Example

**Business Question:** What are all the requisitions between 02/15/2023 and 02/28/2023 which may or may have not been sourced to a PO?

By performing a LEFT Outer Join, we should keep the integrity of the results of the first table (all requisitions entered between 2/15/2023 and 2/28/2023); however now the results should include all the requisitions, whether sourced or not to a PO due to the “join to get additional fields only”. There is no filtering associated with Left Outer Join.

Main Menu>Reporting Tools>Query>Query Manager

1. Click Create New Query
2. Search for and Add the REQ\_HDR
3. Choose the REQ\_ID field
4. Click the Criteria Funnel next to the ENTERED\_DT field
5. Change the condition type to “Between”.
6. Enter “02/15/2023” in Date 1
7. Enter “02/28/2023” in the Date 2 box
8. Click OK
9. Save the Query
10. Click Run
11. Click records to search for and select Join the PO\_LINE\_DISTRIB record
12. Click Join Record



Query Tools

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

Query Name FIU\_FSSS\_LF\_JOINS Description Standard Join Example

\*Search By Record Name begins with PO\_LINE\_DISTRIB

**Search** Advanced Search

Search Results

**Record**

1-1 of 1 View All

Recname	Join Record	Show Fields
PO_LINE_DISTRIB - PO Line Accounting Entries	<b>Join Record</b>	Show Fields

Save Save As New Query Preferences Properties

Publish as Feed Publish as Pivot Grid New Union

[Return To Search](#)

13. Select the Join to get additional fields only (Left Outer Join)

14. Click the A=REQ\_HDR link

Select join type and then record to join with PO\_LINE\_DISTRIB - PO Line Accounting Entries.

**Join Type**

☐ Join to filter and get additional fields (Standard Join)

☒ Join to get additional fields only (Left outer join)

**Join Record**

A = REQ\_HDR - Requisition Header

Cancel

The criteria show the join will occur where there is a BUSINESS\_UNIT and a REQ\_ID field.

**Auto Join Criteria**

Query has detected the join conditions shown below.  
Use the checkboxes to unselect the criteria that you do not want to add to the query and click add criteria when done. The criteria added can always be modified later using the criteria tab.

<input checked="" type="checkbox"/>	A.BUSINESS_UNIT - Business Unit = B.BUSINESS_UNIT - Business Unit
<input checked="" type="checkbox"/>	A.REQ_ID - Requisition ID = B.REQ_ID - Requisition ID

**Add Criteria** Cancel

15. Choose PO ID field
16. Click Properties and choose Distinct again
17. Click Save
18. Click Run

Query Tools

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Query Name New Unsaved Query Description [Feed](#)

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	REQ HDR - Requisition Header	Hierarchy Join
B	PO_LINE_DISTRIB - PO Line Accounting Entries left outer joined with A	Hierarchy Join

Check All Uncheck All

**Fields**  1-50 of 135 View 100

<input type="checkbox"/>	BUSINESS_UNIT - Business Unit	
<input checked="" type="checkbox"/>	PO_ID - PO Number	
<input type="checkbox"/>	LINE_NBR - Line Number	
<input type="checkbox"/>	SCHED_NBR - Schedule Number	
<input type="checkbox"/>	DST_ACCT_TYPE - Accounting Entry Type	
<input type="checkbox"/>	DISTRIB_LINE_NUM - Distribution Line	
<input type="checkbox"/>	QTY_PO - Purchase Order Quantity	
<input type="checkbox"/>	CURRENCY_CD - Currency Code	

The results increase because now the query includes Requisitions that have not sourced to a Purchase Order.

Query Tools

65	0000281835	0000254259
66	0000281891	0000254266
67	0000281878	0000254335
68	0000281988	0000254336
69	0000281945	0000254361
70	0000281810	0000254178
71	0000281819	0000254179
72	0000281815	0000254180
73	0000281832	0000254198
74	0000281678	0000251862
75	0000282100	0000254456
76	0000282142	0000254468
77	0000282257	
78	0000282039	
79	0000282238	
80	0000282268	
81	0000281947	
82	0000282222	
83	0000282002	
84	0000281861	
85	0000282036	
86	0000282165	
87	0000282081	
88	0000282184	
89	0000281817	
90	0000282281	
91	0000282086	0000244169
92	0000281904	0000245698

## Aggregate Functions in Query

An Aggregate is a property used to help perform computations or mathematical functions on a set of values to summarize or roll up the data. For example, rather than running a query that lists separate rows of data by expense account and journal monetary amounts in those accounts, an aggregate could be used to obtain the total monetary amount by expense account.

When applied to fields, Aggregate Functions redefine how that field is used throughout the query. PeopleSoft Query replaces the field, wherever it occurs, with the results of the function.

**The table below lists the aggregate functions that can be applied to a field.**

Aggregate Function	Action
None	The field does not have an aggregate function defined (Default)
Sum	Adds related values in each row and displays the total.
Count	Counts the number of rows.
Min (Minimum)	Checks the value from each row and returns the lowest one.
Max (Maximum)	Checks the value from each row and returns the highest one.
Average	Adds the related values in each row and divides the result by the number of rows.
Count Distinct	Counts the number of non-null value rows in the query result, and the duplicated rows are counted once

### Aggregate Functions Example

**Business Question:** What was the total monetary amount for each journal by account on 02/17/2023? The Aggregate feature of SUM will narrow down multiple journal line data rows into one row of information.

1. Navigate to Query Manager
2. Search and add the **JRNL\_LN** record

Query Tools

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Query Name New Unsaved Query Description [Feed](#)

\*Search By Record Name begins with **JRNL\_LN**

Search Advanced Search

Search Results

Record

1-2 of 2 View All

Recname	Add Record	Show Fields
JRNL_LN - Journal Line Data	<b>Add Record</b>	Show Fields
JRNL_LN_FS - Journal Line Data	Add Record	Show Fields

Save Save As New Query Preferences Properties

Publish as Feed Publish as Pivot Grid New Union

Return To Search

3. Select the **Business Unit, Account, and Monetary Amount** fields.
4. Click Save (at the bottom of the screen).
5. Click the **Criteria Funnel** next to **JOURNAL\_DATE** field (to add the 2/17/2023 criteria).

Query Tools

Fields 1-50 of 72 View All

<input checked="" type="checkbox"/>	BUSINESS_UNIT - Business Unit	
<input type="checkbox"/>	JOURNAL_ID - Journal ID	
<input type="checkbox"/>	JOURNAL_DATE - Journal Date	
<input type="checkbox"/>	UNPOST_SEQ - UnPost Sequence	
<input type="checkbox"/>	JOURNAL_LINE - GL Journal Line Number	
<input type="checkbox"/>	LEDGER - Ledger	Join LED_GRP_LED_TBL - Ledger Group Ledgers
<input type="checkbox"/>	SPEEDCHART_KEY - SpeedChart Key	
<input type="checkbox"/>	SPEEDTYPE_KEY - SpeedType Key	
<input type="checkbox"/>	ACCOUNT_CODE - Accounting Tag	
<input checked="" type="checkbox"/>	ACCOUNT - Account	
<input type="checkbox"/>	ALTACCT - Alternate Account	
<input type="checkbox"/>	DEPTID - Department	
<input type="checkbox"/>	OPERATING_UNIT - Operating Unit	
<input type="checkbox"/>	PRODUCT - Task	
<input type="checkbox"/>	FUND_CODE - Fund Code	
<input type="checkbox"/>	CLASS_FLD - Site	
<input type="checkbox"/>	PROGRAM_CODE - Program Code	
<input type="checkbox"/>	BUDGET_REF - Budget Reference	
<input type="checkbox"/>	AFFILIATE - Affiliate	Join AFFILIATE_VW - View of GL Bus Unit Table
<input type="checkbox"/>	AFFILIATE_INTRA1 - Fund Affiliate	
<input type="checkbox"/>	AFFILIATE_INTRA2 - Operating Unit Affiliate	
<input type="checkbox"/>	CHARTFIELD1 - Activity Nbr	
<input type="checkbox"/>	CHARTFIELD2 - Cost PID	
<input type="checkbox"/>	CHARTFIELD3 - ChartField 3	
<input type="checkbox"/>	BOOK_CODE - Book Code	Join BOOK_CODE_TBL - Book Code
<input type="checkbox"/>	GL_ADJUST_TYPE - Adjustment Type	
<input type="checkbox"/>	BUDGET_PERIOD - Budget Period	
<input type="checkbox"/>	SCENARIO - Scenario	Join BD_SCENARIO_TBL - Budget Scenario Table
<input type="checkbox"/>	CURRENCY_CD - Currency Code	Join CURRENCY_CD_TBL - Currency Codes
<input type="checkbox"/>	BUSINESS_UNIT_PC - PC Business Unit	
<input type="checkbox"/>	PROJECT_ID - Project	
<input type="checkbox"/>	ACTIVITY_ID - Activity	
<input type="checkbox"/>	RESOURCE_TYPE - Source Type	Join PROJ_RESTYPE_FS - Project Resource Types View
<input type="checkbox"/>	RESOURCE_CATEGORY - Category	
<input type="checkbox"/>	RESOURCE_SUB_CAT - Subcategory	
<input type="checkbox"/>	ANALYSIS_TYPE - Analysis Type	
<input type="checkbox"/>	STATISTICS_CODE - Statistics Code	Join STAT_TBL - Statistics Codes
<input checked="" type="checkbox"/>	MONETARY_AMOUNT - Monetary Amount	
<input type="checkbox"/>	MOVEMENT_FLAG - Movement Flag	
<input type="checkbox"/>	STATISTIC_AMOUNT - Statistic Amount	

6. Enter "02/17/2023" as the date. Then click **OK**.

### Edit Criteria Properties

Choose Expression 1 Type

☒ Field

☐ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname

A.JOURNAL\_DATE - Journal Date

\*Condition Type equal to

Choose Expression 2 Type

☐ Field

☐ Expression

☒ Constant

☐ Prompt

☐ Subquery

Expression 2

Define Constant

\*Date 02/17/2023

OK

Cancel

7. Click the **Run** tab.

Results show every transaction (or journal line) that was recorded on that date (02/17/2023) by account. To view Monetary Amount totals by account, an aggregate sum function can be added to group the monetary amount values to form a single value by account.

Query Tools

RecordsQueryExpressionsPromptsFieldsCriteriaHavingView SQLRun

View All | Rerun Query | Download to Excel | Download to XML

First 1-100 of 1598 Last

Row	Unit	Account	Amount
1	FIU01	757005	30090.870
2	FIU01	657005	-30090.870
3	FIU01	112009	-30090.870
4	FIU01	112009	30090.870
5	FIU01	773906	1200.000
6	FIU01	357001	-1200.000
7	FIU01	112009	-1200.000
8	FIU01	112009	1200.000
9	FIU01	389001	8266104.000
10	FIU01	631020	-8266104.000
11	FIU01	389001	10641537.000
12	FIU01	631020	-10641537.000
13	FIU01	711913	60000.000
14	FIU01	711913	65000.000
15	FIU01	711913	-60000.000

8. Click the **Fields** Tab. Click **Edit** next to the Monetary Amount Field

The screenshot shows the 'Query Tools' interface with the 'Fields' tab selected. The 'Fields' list contains three entries: 'A.BUSINESS\_UNIT - Business Unit', 'A.ACCOUNT - Account', and 'A.MONETARY\_AMOUNT - Monetary Amount'. The 'Edit' button for the 'A.MONETARY\_AMOUNT' field is highlighted with a red box. A tooltip 'Edit Field Properties' is visible over the 'Edit' button.

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.MONETARY_AMOUNT - Monetary Amount	SNm25.3				Amount		Edit	—

9. In the **Edit Field Properties** box choose from the **Aggregates**, “Sum.” Click **OK**.

The 'Edit Field Properties' dialog box is shown. The 'Field Name' is 'A.MONETARY\_AMOUNT - Monetary Amount'. Under the 'Heading' section, 'RFT Short' is selected. Under the 'Aggregate' section, 'Sum' is selected. The 'Heading Text' is 'Amount' and the '\*Unique Field Name' is 'A.MONETARY\_AMOUNT'. The 'OK' button is highlighted with a red box.

**Edit Field Properties**

Field Name A.MONETARY\_AMOUNT - Monetary Amount

**Heading**

☐ No Heading ☒ RFT Short ☐ RFT Long

☐ Text

Heading Text  
Amount

\*Unique Field Name  
A.MONETARY\_AMOUNT

**Aggregate**

☐ None ☒ Sum ☐ Count ☐ Min ☐ Max ☐ Average ☐ Count Distinct

OK Cancel

The screenshot shows the 'Query Tools' interface with the 'Fields' tab selected. The 'Fields' list now shows the 'A.MONETARY\_AMOUNT' field with the 'Sum' aggregate applied, and the heading text updated to 'Sum Amount'. The 'A.MONETARY\_AMOUNT' row and the 'Sum' aggregate option are highlighted with red boxes.

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.MONETARY_AMOUNT - Monetary Amount	SNm25.3			Sum	Sum Amount		Edit	—

10. Click **Save** and **Run**. The new results show the rows organized by single accounts. Also, the monetary amount field has changed to a Sum Amount.

Records	Query	Expressions	Prompts	Fields	Criteria	Having	View SQL	Run
<a href="#">View All</a>   <a href="#">Rerun Query</a>   <a href="#">Download to Excel</a>   <a href="#">Download to XML</a>								First 1-100 of 185 Last
Row	Unit	Account	Sum Amount					
1	FIU01	657005	-4095028.670					
2	FIU01	331001	22792.900					
3	FIU01	619019	-782.000					
4	FIU01	773105	375.000					
5	FIU01	773606	3881.850					
6	FIU01	711182	960.000					
7	FIU01	155002	4033761.480					
8	FIU01	614201	-35838.390					
9	FIU01	711231	1473.670					
10	FIU01	711256	181.030					
11	FIU01	167002	666.220					
12	FIU01	679114	300.000					
13	FIU01	768201	137769.760					
14	FIU01	613607	0.000					
15	FIU01	613102	-1050.700					
16	FIU01	613605	-502077.040					
17	FIU02	112201	40811.840					
18	FIU04	772116	1400.000					
19	FIU01	112005	-12231878.520					
20	FIU01	711075	79.040					

## Having Criteria

**Having** criteria is used when associated to a field with an aggregate function. Aggregated fields cannot use the regular selection criteria (**Criteria** tab); therefore, any criteria must be created using the **Having** tab.

### Having Criteria Example

**Business Question:** What are all the accounts that net to zero from related journal lines on 02/17/2023?

After displaying the results from the [Aggregate example](#), follow these steps to create the Having criteria:

1. Click the **Having** tab then choose **Add Having Criteria**.

The screenshot shows the 'Query Tools' interface with the 'Having' tab highlighted in a red box. Below the tabs, the 'Add Having Criteria' button is also highlighted in a red box. The interface includes fields for 'Query Name' (FIU FSSS AMOUNT) and 'Description'. Other buttons like 'Save', 'Save As', 'Add Criteria to Query', 'Publish as Feed', 'Publish as Pivot Grid', 'Preferences', 'Properties', 'New Union', and 'Return To Search' are visible.

2. Use the lookup glass in **Expression 1, Choose Record and Field** box to search for the **Monetary Amount** field. Notice it is the only field that shows up because it is the only 'aggregated' field.

The screenshot shows the 'Edit Having Criteria Properties' dialog box. It has two main sections: 'Expression 1' and 'Expression 2'. In the 'Expression 1' section, the 'Choose Record and Field' box has a search icon highlighted in a red box. In the 'Expression 2' section, the 'Define Constant' box has a search icon. The 'Condition Type' dropdown is set to 'equal to'. At the bottom, there are 'OK' and 'Cancel' buttons.



Click the [A. MONETARY\\_AMOUNT – Monetary Amount](#) field.

**Select a field**

Select a record to show fields for

Alias	Record	Record Description	Show Fields
A	JRNL_LN	Journal Line Data	Show Fields

Select a field

A.MONETARY\_AMOUNT - Monetary Amount

Cancel

3. Ensure Condition Type is at “equal to”
4. Constant Value = 0.00
5. Click OK

**Edit Having Criteria Properties**

**Choose Expression 1**  
Type

☒ Field  
☐ Expression

**Expression 1**

Choose Record and Field

Record Alias.Fieldname

A.MONETARY\_AMOUNT - Monetary A

\*Condition Type equal to

**Choose Expression 2**  
Type

☐ Field  
☐ Expression  
☒ Constant  
☐ Prompt  
☐ Subquery

**Expression 2**

Define Constant

Constant 0.00

OK Cancel

Query Tools

Records

Query

Expressions

Prompts

Fields

Criteria

Having

View SQL

Run

Query Name

FIU\_FSSS\_AMOUNT

Description

Feed

Add Having Criteria

Group Having Criteria

Having Criteria

Q

1-1 of 1

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.MONETARY_AMOUNT - Monetary Amount	equal to	0.00	Edit	—

Save

Save As

New Query

Preferences

Properties

Publish as Feed

Publish as Pivot Grid

New Union

Return To Search

6. Click the **Run** tab. Results show the summed amounts equal to zero.

Query Tools

Records

Query

Expressions

Prompts

Fields

Criteria

Having

View SQL

Run

View All

Rerun Query

Download to Excel

Download to XML

First

1-20 of 20

Last

Row	Unit	Account	Sum Amount
1	FIU01	613607	0.000
2	FIU01	155003	0.000
3	FIU01	331021	0.000
4	FIU01	671204	0.000
5	FIU01	711602	0.000
6	FIU02	112009	0.000
7	FIU01	112009	0.000
8	FIU01	311098	0.000
9	FIU01	711085	0.000
10	FIU01	672239	0.000
11	FIU01	773304	0.000
12	FIU01	711916	0.000
13	FIU01	773101	0.000
14	FIU02	619017	0.000
15	FIU01	288001	0.000
16	FIU01	772111	0.000
17	FIU01	112028	0.000
18	FIU01	761006	0.000
19	FIU01	155004	0.000
20	FIU01	112017	0.000

# Expressions

Expressions are calculations that PeopleSoft Query performs as part of a query. They are used to display a value of a field differently than the way the field is stored or used in the record. Examples include using it to perform calculations other than the predefined aggregates, calculations against aggregated values, filter data by using expressions as selection criteria or access information from external sources.

There are two basic types of expressions, using them as columns in the query output (as field) or in criteria to filter out data. To use expressions as fields, select the **Expressions** tab, select the expression type and any expression text.

## Expressions Example

**Business Scenario:** I need my query to show a field with the names of the employees who entered journals on 02-17-2023.

Using values drawn from specific fields (First Name and Last Name), we will add an expression that displays both fields as one field in one separate column we will name: Full Name.

1. Main Menu>Reporting Tools>Query>Query Manager
2. Click Create New Query
3. Search for the JRNL\_HEADER record
4. Add record

The screenshot shows the 'Query Tools' interface with the 'Records' tab selected. The 'Query Name' is 'New Unsaved Query'. The search criteria is set to 'Record Name' and the search text is 'JRNL\_HEADER'. The search results table shows three records: 'JRNL\_HEADER - Journal Header Data' and 'JRNL\_HEADER\_FS - Journal Header Data'. The 'Add Record' button for the first record is highlighted with a red box.

Recname	Add Record	Show Fields
JRNL_HEADER - Journal Header Data	Add Record	Show Fields
JRNL_HEADER_FS - Journal Header Data	Add Record	Show Fields

5. Select the BUSINESS\_UNIT, JOURNAL\_ID, JOURNAL\_DATE, and scroll down to select OPR\_ID.
6. Click the Criteria Funnel next to JOURNAL\_DATE

Alias Record

A JRNL\_HEADER - Journal Header Data

Check All Uncheck All

Fields

1-50 of 78 View All

☒ BUSINESS\_UNIT - Business Unit

☒ JOURNAL\_ID - Journal ID

☒ JOURNAL\_DATE - Journal Date

☐ UNPOST\_SEQ - UnPost Sequence

☐ BUSINESS\_UNIT\_IU - Business Unit

☐ ADJUSTING\_ENTRY - Adjusting Entry

☐ FISCAL\_YEAR - Fiscal Year

☐ ACCOUNTING\_PERIOD - Accounting Period

☐ ADB\_DATE - Average Daily Balance Date

☐ LEDGER\_GROUP - Ledger Group

☐ LEDGER - Ledger

Join LED\_GRP\_LED\_TBL - Ledger Group Ledgers

☐ AUTO\_GEN\_LINES - Auto Generate Lines

☐ REVERSAL\_CD - Reversal Code

☐ REVERSAL\_DATE - Reversal Date

☐ REVERSAL\_ADJ\_PER - Adjustment Period

☐ REVERSAL\_CD\_ADB - ADB Reversal Code

☐ REVERSAL\_DATE\_ADB - ADB Reversal Date

☐ UNPOST\_JRNL\_DATE - Unpost Date

☐ JRNL\_TOTAL\_LINES - Journal Total Lines

☐ JRNL\_TOTAL\_DEBITS - Journal Total Debits

☐ JRNL\_TOT\_CREDITS - Journal Total Credits

☐ JRNL\_NET\_UNITS - Journal Net Statistical Units

☐ SOURCE - Source

Join SOURCE\_TBL - Journal Sources

☐ TRANS\_REF\_NUM - Reference Number

☐ JRNL\_BALANCE\_STAT - Journal Balance Status

☐ CONTROL\_TOTAL\_STAT - Control Total Status

☐ JRNL\_EDIT\_ERR\_STAT - Journal Edit Error Status

☐ JRNL\_HDR\_STATUS - Journal Header Status

☐ SUSP\_RECON\_STATUS - Suspense Reconciliation Status

☐ JRNL\_PROCESS\_REQST - Journal Processing Request

☐ JRNL\_SUMLED\_REQST - Post to Summary Ledger

☐ SJE\_TYPE - Standard Journal Entry Type

☐ SCHEDULE - Schedule ID

Join SCHEDULE\_TBL - Schedules

☐ EVENT\_OCCURRENCE - Event Occurrence

Join EVENTS\_TBL - SJE Events

☐ POSTED\_DATE - Date Posted

☐ PROCESS\_INSTANCE - Process Instance

☐ SOURCE\_INSTANCE - Source Instance

☐ TRANSACTION\_DATE - Transaction Date

☐ LAST\_LN\_COMMITTED - Last Line Committed

☒ OPRID - User ID

☐ DTTM\_STAMP\_SEC - Last Update DateTime

7. Enter the date 02/17/2023 in the Define Constant Field
8. Click OK

**Edit Criteria Properties**

**Choose Expression 1 Type**

☒ Field

☐ Expression

**Expression 1**

**Choose Record and Field**

Record Alias.FieldName

AJOURNAL\_DATE - Journal Date

**\*Condition Type** equal to

**Choose Expression 2 Type**

☐ Field

☐ Expression

☒ Constant

☐ Prompt

☐ Subquery

**Expression 2**

**Define Constant**

\*Date 02/17/2023

OK Cancel

9. Click the Records Tab
10. Search for the PERSONAL\_DATA record
11. Click on Join Record

The screenshot shows the 'Query Tools' interface with the 'Records' tab selected. The search criteria are set to 'Record Name' and 'PERSONAL\_DATA'. The search results show one record: 'PERSONAL\_DATA - EE Personal Data'. The 'Join Record' button is highlighted with a red box.

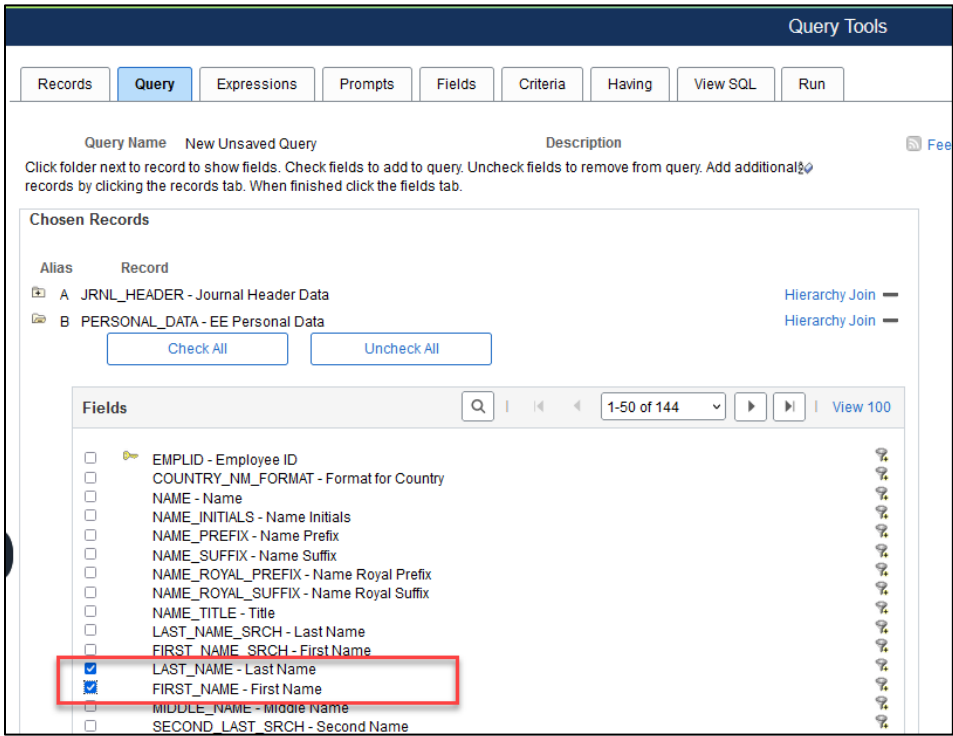
12. Leave default at Standard Join
13. Click the JRNL\_HEADER link

The screenshot shows a dialog box titled 'Select join type and then record to join with PERSONAL\_DATA - EE Personal Data.' The 'Join Type' section has two options: 'Join to filter and get additional fields (Standard Join)' (selected) and 'Join to get additional fields only (Left outer join)'. The 'Join Record' section shows a list of records, with 'A = JRNL\_HEADER - Journal Header Data' selected and highlighted with a red box. There is a 'Cancel' button at the bottom.

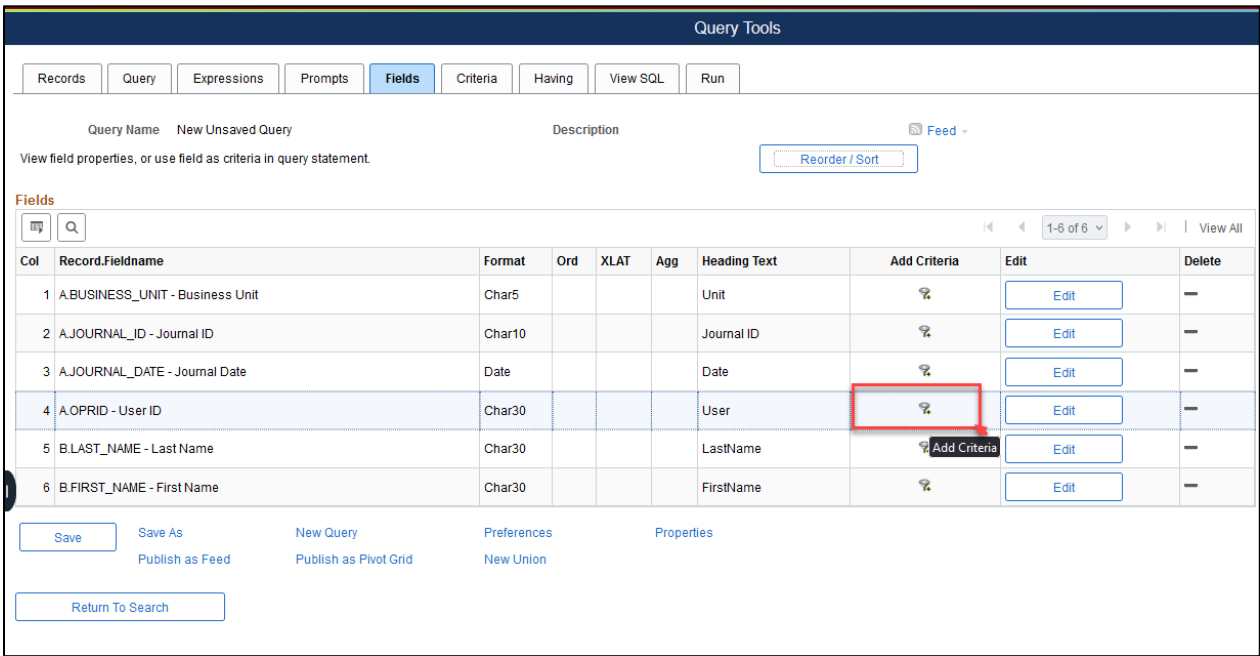
The screenshot shows the main query interface with a warning message displayed. The message reads: 'No join conditions were found between records A.JRNL\_HEADER - Journal Header Data and B.PERSONAL\_DATA - EE Personal Data. (139,101)'. Below the message is a warning: 'Warning: This may result in a very large number of rows to be returned when running this query.' There is an 'OK' button at the bottom of the warning box.

Since there are no join conditions (common fields) for the two records to join, we must create the join manually. We are going to add criteria to make EMPL ID to OPR ID equal, and the records will join there.

14. Select the LAST\_NAME and FIRST\_NAME fields



- 15. Click the Fields Tab
- 16. Click the Criteria Funnel next to OPR\_ID



- 17. Choose Field in the Expression 2 type
- 18. Use the Lookup glass to choose the EMPL\_ID field from B PERSONAL\_DATA record.

19. Click OK

### Edit Criteria Properties

**Choose Expression 1 Type**

☒ Field  
☐ Expression

**Expression 1**

**Choose Record and Field**

Record Alias.Fieldname  
A.OPRID - User ID

**\*Condition Type** equal to

**Choose Expression 2 Type**

☒ Field  
☐ Expression  
☐ Constant  
☐ Prompt  
☐ Subquery

**Expression 2**

**Choose Record and Field**

Record Alias.Fieldname  
B.EMPLID - Employee ID

OK

Cancel

Query Tools

Records

Query

Expressions

Prompts

Fields

Criteria

Having

View SQL

Run

Query Name

New Unsaved Query

Description

Feed

Add Criteria

Group Criteria

Reorder Criteria

Criteria

1-2 of 2

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.JOURNAL_DATE - Journal Date	equal to	2023-02-17	Edit	—
AND	A.OPRID - User ID	equal to	B.EMPLID - Employee ID	Edit	—

Save

Save As

New Query

Preferences

Properties

Publish as Feed

Publish as Pivot Grid

New Union

Return To Search

20. Select the Expressions tab and Click Add Expressions

The screenshot shows the 'Query Tools' interface with the 'Expressions' tab selected. The 'Add Expression' button is highlighted with a red box. Below the tab, there are buttons for 'Save', 'Save As', 'New Query', 'Preferences', and 'Properties'. A 'Return To Search' button is also visible at the bottom. The text 'No expressions have been defined yet.' is displayed in the center.

21. Use Expression Type: Character and modify Length to increase number of characters allowed, i.e., 30 to accommodate long names.

22. Click Add Field

The screenshot shows the 'Edit Expression Properties' dialog box. The '\*Expression Type' dropdown menu is set to 'Character' and is highlighted with a red box. The 'Length' input field is set to '1' and is also highlighted with a red box. The 'Decimals' input field is empty. The 'Add Field' button is highlighted with a red box. The 'OK' and 'Cancel' buttons are at the bottom.



23. Choose the B.FIRST\_NAME field from the PERSONAL\_DATA record (click show fields)

Select a field

Select a record to show fields for

1-2 of 2

Alias	Record	Record Description	Show Fields
A	JRNL_HEADER	Journal Header Data	Show Fields
B	PERSONAL_DATA	EE Personal Data	Show Fields

Select a field

1-50 of 144

View 100

B.EMPLID - Employee ID

B.COUNTRY\_NM\_FORMAT - Format for Country

B.NAME - Name

B.NAME\_INITIALS - Name Initials

B.NAME\_PREFIX - Name Prefix

B.NAME\_SUFFIX - Name Suffix

B.NAME\_ROYAL\_PREFIX - Name Royal Prefix

B.NAME\_ROYAL\_SUFFIX - Name Royal Suffix

B.NAME\_TITLE - Title

B.LAST\_NAME\_SRCH - Last Name

B.FIRST\_NAME\_SRCH - First Name

B.LAST\_NAME - Last Name

B.FIRST\_NAME - First Name

B.MIDDLE\_NAME - Middle Name

24. Type the [Concatenate formula](#): (space) || (space) '(space)' (space)|| (space)
25. Click on Add Field and select B.LAST\_NAME
26. Click OK

**Edit Expression Properties**

\*Expression Type  
Character

Length 30

☐ Aggregate Function

Decimals

Expression Text  
B.FIRST\_NAME || ' ' || B.LAST\_NAME

Add Prompt Add Field

OK Cancel

27. Select Use as Field

Query Tools

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Query Name FIU\_FSSS\_EXPRESSIONS Description Manual Feed

Add Expression

Expressions List

Expression Text	Use as Field	Add Criteria	Edit	Delete
B.FIRST_NAME    ' '    B.LAST_NAME	Use as Field		Edit	-

Save Save As New Query Preferences Properties Publish as Feed Publish as Pivot Grid New Union Return To Search

28. Notice the Field has now been added with the expression listed as Heading Text

29. Delete LAST\_NAME and FIRST\_NAME and Click on Edit to change the field heading to Full Name.

Query Tools

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

Query Name: FIU\_FSSS\_EXPR Description: [Feed](#)

View field properties, or use field as criteria in query statement. [Reorder / Sort](#)

Fields

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.BUSINESS_UNIT - Business Unit	Char5				Unit		<a href="#">Edit</a>	—
2	A.JOURNAL_ID - Journal ID	Char10				Journal ID		<a href="#">Edit</a>	—
3	A.JOURNAL_DATE - Journal Date	Date				Date		<a href="#">Edit</a>	—
4	A.OPRID - User ID	Char30				User		<a href="#">Edit</a>	—
5	B.LAST_NAME_SRCH - Last Name	Char30				Last Name		<a href="#">Edit</a>	—
6	B.FIRST_NAME_SRCH - First Name	Char30				First Name		<a href="#">Edit</a>	—
7	B.FIRST_NAME    ' '    B.LAST_NAME	Char25				B.FIRST_NAME    ' '    B.LAST_		<a href="#">Edit</a>	—

30. Click Save

31. Click Run

Query Tools

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

View All | [Rerun Query](#) | [Download to Excel](#) | [Download to XML](#)

First 1-62 of 62 Last

Row	Unit	Journal ID	Date	User	Full Name
1	FIU01	0001312724	02/17/2023	1346696	Marta Torres
2	FIU01	0001312546	02/17/2023	2629279	Lesbia Gutierrez
3	FIU01	0001312715	02/17/2023	4226173	MELISAH MILLER
4	FIU01	0001312716	02/17/2023	4226173	MELISAH MILLER
5	FIU01	0001313014	02/17/2023	1188035	Iliana Perez
6	FIU01	0001313018	02/17/2023	1188035	Iliana Perez
7	FIU01	0001312777	02/17/2023	6189686	VALENTINA LUQUE
8	FIU01	0001312778	02/17/2023	6189686	VALENTINA LUQUE
9	FIU01	0001312554	02/17/2023	1067094	SHARON DUCHATELIER
10	FIU01	0001316266	02/17/2023	0108427	Raul Velez
11	FIU01	0001316282	02/17/2023	0108427	Raul Velez
12	FIU01	0001312693	02/17/2023	6055252	Ida Judith Litt Pine
13	FIU01	0001312690	02/17/2023	6030562	Valentina Petre
14	FIU01	0001312734	02/17/2023	1020643	Thaddeus Randall
15	FIU01	0001315605	02/17/2023	2578622	Maria Mejia
16	FIU02	0001312713	02/17/2023	1275454	Margarita Zabalo

## Common Expressions Syntax

To tell the system how to “express” a value, the input must be specific.

<b>sub string</b>	<b>SUBSTR</b> ('ABCDEFGG',3,4) → CDEF	give me part of the string ABCDEFG which starts in position 3 (C) and is 4 letters long → CDEF
<b>multiply</b>	A.Cost_per_unit * 500 → use as Field	1.1. give me the total cost and use the total cost as a new column in the query result 1.2. can use the total cost in a criterion, such as to only show total cost > 5000
<b>concatenate</b>	A.Dept_ID    ' - '    A.Description	1.1. This merges field results (data) together show me the result in the form: 110401000 – Controller
<b>length</b>	<b>LENGTH</b> (A.DEPT_ID) → 9	
<b>Trim</b>	<b>Trim</b> (A.Req_ID) → remove leading zeros	
<b>System date</b>	<b>SYSDATE</b> – A.APPROVAL_DATE → how many days ago approved	

## Subqueries

A *subquery*, sometimes called a *sub-SELECT*, is a query whose results are used as comparison value for the selected criteria by another query. Subqueries can return a single value, a list of values, or check for existence. The condition type used in the subquery criteria will determine the subquery type.

### Single Value Subquery

- Condition type that produces a single value (equal to, min, max, etc.). It can be used with a subquery or in standard criteria.

### In List Subquery

- In List/Not In List condition type. It can be used with a subquery or in standard criteria.

### Exists Subquery

- Exists/Does Not Exist condition type. This condition type is used exclusively with subqueries. When the condition type “Exists” is selected, the only option for Expression 2 Type is “Subquery” and there is no Expression 1 as there is no comparison. The subquery will evaluate either a true or false response.

The *in list Condition Type*, which is used in the subquery example provided below, prompts users to search for or create a list using the Edit List dialog box to identify the set of values your query will use for comparison when applied to a standard criteria.

To build a list of values within your query, choose the record and field under **Record Alias.Fieldname**. Select **Condition Type**: in list and click the search glass icon within the **Edit List** box for a list options.

The screenshot shows the 'Edit Criteria Properties' dialog box. It is divided into two main sections: 'Expression 1' and 'Expression 2'.  
In the 'Expression 1' section, 'Choose Expression 1 Type' has 'Field' selected. 'Choose Record and Field' shows 'Record Alias.Fieldname' with a search icon and the text 'AREQ\_STATUS - Requisition Sta' highlighted.  
In the center, '\*Condition Type' is set to 'in list'.  
In the 'Expression 2' section, 'Choose Expression 2 Type' has 'In List' selected. 'Edit List' shows 'List Members' with a search icon highlighted.  
At the bottom are 'OK' and 'Cancel' buttons.

In the example below, *in list* will be used as condition type for Expression 2 Type: Subquery, which allows to create a new query within your original query using a new record.

### Subquery Example

**Business Question:** Our department needs to identify employees who are travel proxies and expense managers for the university.

Start by creating a top query with all employees who are travel proxies. Then, the subquery will use the results of the top query (employees who are proxies) and criteria to show who are also expense managers.

The first part of a subquery is to build the top query. Use the following steps as an example.

1. Navigate to **Query Manager** and [Create New Query](#).
2. Search for and Add the **EX\_EE\_AUTH\_TBL** record.

The screenshot displays the 'Query Tools' interface. At the top, there is a dark blue header with the text 'Query Tools'. Below this is a navigation bar with tabs: 'Records' (highlighted in blue), 'Query', 'Expressions', 'Prompts', 'Fields', 'Criteria', 'Having', 'View SQL', and 'Run'. The main area is divided into sections. The top section contains a 'Query Name' field with the value 'New Unsaved Query' and a 'Description' field. Below these is a search section with a '\*Search By' dropdown set to 'Record Name', a 'begins with' label, and a text input field containing 'EX\_EE\_AUTH\_TBL'. A blue 'Search' button is highlighted with a red box. Below the search section is a 'Search Results' section. The 'Record' section shows a table with one record: 'EX\_EE\_AUTH\_TBL - Employee Authority'. The 'Add Record' button in this section is highlighted with a red box. At the bottom, there is a 'Return To Search' button.

Query Name	Description
New Unsaved Query	

\*Search By: Record Name begins with EX\_EE\_AUTH\_TBL

Search

Search Results

Record

Recname	Add Record	Show Fields
EX_EE_AUTH_TBL - Employee Authority	Add Record	Show Fields

Save Save As New Query Preferences Properties  
Publish as Feed Publish as Pivot Grid New Union

Return To Search

3. Choose the **AUTHORIZED\_OPRID** field. Then, click the funnel next to the AUTHORIZED\_OPRID field.

Query Tools

Records Query Expressions Prompts Fields Criteria Having View SQL Run

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 EX\_EE\_AUTH\_TBL - Employee Authority Hierarchy Join

Check All Uncheck All

Fields

FMPI ID - FmPI ID

☒ AUTHORIZED\_OPRID - Authorized User ID

EE\_AUTH\_LEVEL - Authorization Level

Join PERSONAL\_DATA - EE Personal Data

Use as Criteria

Save Save As New Query Preferences Properties

Publish as Feed Publish as Pivot Grid New Union

4. Change **Condition Type** to "not equal to". This will help to eliminate employees who are proxy for themselves, leaving only employees that are proxy for others for the top query results.

Edit Criteria Properties

Choose Expression 1 Type

☒ Field

☐ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname

A.AUTHORIZED\_OPRID - Authorize

\*Condition Type not equal to

Choose Expression 2 Type

☐ Field

☐ Expression

☒ Constant

☐ Prompt

☐ Subquery

Expression 2

Define Constant

Constant

OK Cancel

5. Ensure “Field” is selected in **Expression Type 2** box. Under the **Chose Record and Field** box and **Record Alias.FieldName**, use the lookup glass to select the **EMPL\_ID** field.

**Edit Criteria Properties**

**Choose Expression 1 Type**

☒ Field  
☐ Expression

**Expression 1**

**Choose Record and Field**

Record Alias.FieldName  
A.AUTHORIZED\_OPRID - Authorize

\*Condition Type not equal to

**Choose Expression 2 Type**

☒ Field  
☐ Expression  
☐ Constant  
☐ Prompt  
☐ Subquery

**Expression 2**

**Choose Record and Field**

Record Alias.FieldName  
Select Field

OK Cancel

Select [A.EMPLID – Empl ID](#).

**Select a field**

Select a record to show fields for

Alias	Record	Record Description	Show Fields
A	EX_EE_AUTH_TBL	Employee Authority	Show Fields

Select a field

Field
A.EMPLID - Empl ID
A.AUTHORIZED - Long Description ed User ID
A.EE_AUTH_LEVEL - Authorization Level

Cancel



Click **OK**.

### Edit Criteria Properties

#### Choose Expression 1 Type

☒ Field  
☐ Expression

#### Expression 1

##### Choose Record and Field

Record Alias.Fieldname  
A.AUTHORIZED\_OPRID - Authorize

\*Condition Type

not equal to

#### Choose Expression 2 Type

☒ Field  
☐ Expression  
☐ Constant  
☐ Prompt  
☐ Subquery

#### Expression 2

##### Choose Record and Field

Record Alias.Fieldname  
A.EMPLID - Empl ID

OK

Cancel

6. Next, click the **Criteria** Tab and click **Add Criteria** button.

Records

Query

Expressions

Prompts

Fields

Criteria

Having

View SQL

Run

Query Name

New Unsaved Query

Description

Add Criteria

Group Criteria

Feed

Criteria

1-1 of 1

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
<div></div>	AAUTHORIZED_OPRID - Authorized User ID	not equal to	AEMPLID - Empl ID	<div>Edit</div>	<div>—</div>

Save

Save As

New Query

Preferences

Properties

Publish as Feed

Publish as Pivot Grid

New Union

Return To Search

7. Use the lookup glass in the **Expression 1** box to select the **AUTHORIZED\_OPRID** field

**Edit Criteria Properties**

**Choose Expression 1 Type**

☒ Field  
☐ Expression

**Expression 1**

**Choose Record and Field**

Record Alias.Fieldname

\*Condition Type equal to

**Choose Expression 2 Type**

☐ Field  
☐ Expression  
☒ Constant  
☐ Prompt  
☐ Subquery

**Expression 2**

**Define Constant**

Constant

Click [A.AUTHORIZED OPRID – Authorized User ID](#).

**Select a field**

Select a record to show fields for

Alias	Record	Record Description	Show Fields
A	EX_EE_AUTH_TBL	Employee Authority	<input type="button" value="Show Fields"/>

Select a field

Field
A.EMPLID - Empl ID
<b>A.AUTHORIZED_OPRID - Authorized User ID</b>
A.EE_AUTH_LEVEL - Authorization Level

8. Change the condition type to “in list”. The “in list” condition type finds fields having a value that matches any one of the values in a list of values. With this option, there is an option to create a list or subquery within the Choose Expression 2 Type box.

**Edit Criteria Properties**

**Choose Expression 1 Type**

☒ Field  
☐ Expression

**Expression 1**

**Choose Record and Field**

Record Alias.Fieldname  
A.AUTHORIZED\_OPRID - Authorize

**\*Condition Type** in list

**Choose Expression 2 Type**

☒ In List  
☐ Subquery

**Expression 2**

**Edit List**

List Members

OK Cancel

9. Choose “Subquery” in the **Expression 2 Type** box. Select the [Define/Edit Subquery](#) link under **Define Subquery**, **Expression 2** box.

**Edit Criteria Properties**

**Choose Expression 1 Type**

☒ Field  
☐ Expression

**Expression 1**

**Choose Record and Field**

Record Alias.Fieldname  
A.AUTHORIZED\_OPRID - Authorize

**\*Condition Type** in list

**Choose Expression 2 Type**

☐ In List  
☒ Subquery

**Expression 2**

**Define Subquery**

Define/Edit Subquery

OK Cancel

10. By defining a subquery, the screen re-directs to the **Records** tab. It will indicate that the “working on selection subquery for ....” Type the name of another record in the **begins with** box. In this case it is “EX\_APPRVR.” Click **Search**. Then select that record, click [Add Record](#).

Query Tools

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Query Name New Unsavd Query Description

Working on selection Subquery for A.AUTHORIZED\_OPRID - Authorized User ID

\*Search By Record Name begins with EX\_APPRVR

Search Advanced Search

Search Results

Record

1-2 of 2 View All

Recname	Add Record	Show Fields
EX_APPRVR - Approvers	Add Record	Show Fields
EX_APPRVR_TYPE - Approver Types.	Add Record	Show Fields

Save Save As New Query Preferences Properties

Publish as Feed Publish as Pivot Grid New Union

Return To Search

11. Click [Select](#) next to the **APPROVER\_OPRID** field.

Query Tools

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Query Name New Unsavd Query Description

Working on selection Subquery for A.AUTHORIZED\_OPRID - Authorized User ID

Add additional records by clicking the records tab. When finished select a single field for this subquery and you will be transferred to the fields tab.

Chosen Records

Alias	Record
B	EX_APPRVR - Approvers

Hierarchy Join

Fields

Select	BUSINESS_UNIT_GL - GL Business Unit	
Select	APPROVER_PROFILE - Approver Profile	
Select	APPROVER_OPRID - Approver Oprid	
Select	CHARTFIELD_FROM - Chartfield From	
Select	CHARTFIELD_TO - Chartfield To	

Save Save As New Query Preferences Properties

Publish as Feed Publish as Pivot Grid New Union

Return To Search

12. This will automatically land on the **Fields** Tab. Click on the funnel to create criteria to make B.APPROVER\_OPRID equal to A.AUTHORIZED\_OPRID.

The screenshot shows the 'Query Tools' interface with the 'Fields' tab selected. The 'Fields' tab is highlighted with a red box. Below the tabs, the 'Query Name' is 'FIU\_FSSS\_SUBQUERY' and the 'Description' is 'Manual'. The 'Working on selection' is 'Subquery for A.AUTHORIZED\_OPRID - Authorized User ID'. The 'View field properties, or use field as criteria in query statement.' button is visible. The 'Fields' section shows a table with columns: Col, Record.FieldName, Format, Ord, XLAT, Agg, Heading Text, Add Criteria, and Edit. The first row shows '1 B.APPROVER\_OPRID - Approver Oprid' with 'Char30' format. The 'Add Criteria' button is highlighted with a red box. Below the table are buttons for 'Save', 'Save As', 'New Query', 'Preferences', 'Properties', 'Publish as Feed', 'Publish as Pivot Grid', and 'New Union'.

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit
1	B.APPROVER_OPRID - Approver Oprid	Char30				Approver Oprid		Edit

13. Choose "Field" in the **Expression 2 Type** box.

The screenshot shows the 'Edit Criteria Properties' dialog box. It has two sections: 'Choose Expression 1 Type' and 'Choose Expression 2 Type'. In the 'Choose Expression 1 Type' section, 'Field' is selected. In the 'Choose Expression 2 Type' section, 'Field' is also selected and highlighted with a red box. The 'Expression 1' section shows 'Choose Record and Field' with 'Record Alias.FieldName' and 'B.APPROVER\_OPRID - Approver Op'. The 'Expression 2' section shows 'Choose Record and Field' with 'Record Alias.FieldName'. The '\*Condition Type' is set to 'equal to'. At the bottom are 'OK' and 'Cancel' buttons.

**Edit Criteria Properties**

**Choose Expression 1 Type**

☒ Field  
☐ Expression

**Expression 1**

**Choose Record and Field**

Record Alias.FieldName  
B.APPROVER\_OPRID - Approver Op

\*Condition Type: equal to

**Choose Expression 2 Type**

☒ Field  
☐ Expression  
☐ Constant  
☐ Prompt  
☐ Subquery

**Expression 2**

**Choose Record and Field**

Record Alias.FieldName

OK Cancel

14. Select the lookup glass under **Choose Record and Field, Record Alias.FieldName**.

Edit Criteria Properties

Choose Expression 1 Type

☒Field

☐Expression

Expression 1

Choose Record and Field

Record Alias.FieldName

B.APPROVER\_OPRID - Approver Op

\*Condition Type

equal to

Choose Expression 2 Type

☒Field

☐Expression

☐Constant

☐Prompt

☐Subquery

Expression 2

Choose Record and Field

Record Alias.FieldName

Select Field

OK

Cancel

Select A.AUTHORIZED OPRID – Authorized User ID.

Select a field

Select a record to show fields for

1-2 of 2

Alias	Record	Record Description	Show Fields
A	EX_EE_AUTH_TBL	Employee Authority	<div>Show Fields</div>
B	EX_APPRVR	Approvers	<div>Show Fields</div>

Select a field

1-3 of 3

View All

A.EMPLID - Empl ID

A.AUTHORIZED\_OPRID - Authorized User ID

A.EE\_AUTH\_LEVEL - Authorization Level

Long Description

Cancel

15. Click **OK**.

### Edit Criteria Properties

#### Choose Expression 1 Type


☒ Field

☐ Expression

#### Expression 1

##### Choose Record and Field

Record Alias.Fieldname

 B.APPROVER\_OPRID - Approver Op

\*Condition Type

equal to

#### Choose Expression 2 Type

☒ Field

☐ Expression

☐ Constant


☐ Prompt

☐ Subquery

#### Expression 2

##### Choose Record and Field

Record Alias.Fieldname

 A.AUTHORIZED\_OPRID - Authorize

OK

Cancel

16. Click **the Run** tab.

Reporting Homepage

Query Tools

New Window

Help

Personalize Page

Records

Query

Expressions

Prompts

Fields

Criteria

Having

View SQL

Run

Query Name

FIU\_FSSS\_SUBQUERY

Description

Manual

Feed

Subquery/

Working on selection

Subquery for A.AUTHORIZED\_OPRID - Authorized User ID

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

Reorder / Sort

Fields

1-1 of 1

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit
1	B.APPROVER_OPRID - Approver Oprid	Char30				Approver Oprid		Edit

Save

Save As

New Query

Preferences

Properties

Publish as Feed

Publish as Pivot Grid

New Union

Result amounts may vary. At this point, the list shows employees who are proxies AND approvers.

Query Tools	
Records	Query
Expressions	Prompts
Fields	Criteria
Having	View SQL
Run	
View All   Rerun Query   Download to Excel   Download to XML	
First 1-100 of 8597 Last	
Row	Authorized ID
1	1378914
2	1064595
3	1375886
4	1668670
5	6263933
6	1064595
7	1760463
8	1064595
9	1091848
10	1760463
11	1760463
12	1298015
13	1727962
14	2644829
15	1331764
16	1091848
17	1367108
18	1377848
19	1064595
20	1760463
21	1064595
22	1064595



17. To further refine the query, the approvers need to specifically be expense managers. Click the **Criteria** Tab and click the **Add Criteria** button.

Query Tools

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

Query Name FIU\_FSSS\_SUBQUERY Description Manual [Feed](#)

Working on selection Subquery for A.AUTHORIZED\_OPRID - Authorized User ID [Subquery/Union Navigation](#)

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

**Criteria**

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
<input type="checkbox"/>	B.APPROVER_OPRID - Approver Opid	equal to	A.AUTHORIZED_OPRID - Authorized User ID	<a href="#">Edit</a>	<a href="#">-</a>

[Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#)  
[Publish as Feed](#) [Publish as Pivot Grid](#) [New Union](#)

[Return To Search](#)

18. Use the lookup glass to view records in the Expression 1 box

**Edit Criteria Properties**

**Choose Expression 1 Type**

☒ Field ☐ Expression

**Expression 1**

**Choose Record and Field**

Record Alias.Fieldname

[Q](#)

\*Condition Type equal to

**Choose Expression 2 Type**

☐ Field ☐ Expression ☒ Constant ☐ Prompt ☐ Subquery

**Expression 2**

**Define Constant**

Constant

[Q](#)

[OK](#) [Cancel](#)

19. Choose Show Fields next to the B record

20. Choose APPROVER\_PROFILE

**Select a field**

Select a record to show fields for

Alias	Record	Record Description	Show Fields
A	EX_EE_AUTH_TBL	Employee Authority	Show Fields
B	EX_APPRVR	Approvers	Show Fields

Select a field

B.BUSINESS\_UNIT\_GL - GL Business Unit

**B.APPROVER\_PROFILE - Approver Profile**

B.APPROVER\_OPRID - Approver Oprid

B.CHARTFIELD\_FROM - Chartfield From

B.CHARTFIELD\_TO - Chartfield To

Cancel

21. Leave Condition type as equal to

22. Type "EXPENSE MANAGER" in the Constant box

(The reason why we are isolating the Expense Manager approver type is because approvers can be HR Supervisors, Project Managers, etc.)

23. Click Ok.

**Edit Criteria Properties**

Choose Expression 1 Type

☒ Field

☐ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname

B.APPROVER\_PROFILE - Approver

\*Condition Type equal to

Choose Expression 2 Type

☐ Field

☐ Expression

**☒ Constant**

☐ Prompt

☐ Subquery

Expression 2

Define Constant

Constant EXPENSE MANAGER

OK Cancel

24. Click the Run tab.

Query Tools

Records

Query

Expressions

Prompts

Fields

Criteria

Having

View SQL

Run

Query Name

New Unsaved Query

Description

Feed

Working on selection

Subquery for A.AUTHORIZED\_OPRID - Authorized User ID

Subquery/Union Navigation

Add Criteria

Group Criteria

Reorder Criteria

Criteria

1-2 of 2

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	B.APPROVER_OPRID - Approver Oprid	equal to	A.AUTHORIZED_OPRID - Authorized User ID	Edit	—
AND	B.APPROVER_PROFILE - Approver Profile	equal to	EXPENSE MANAGER	Edit	—

Save

Save As

New Query

Preferences

Properties

Publish as Feed

Publish as Pivot Grid

New Union

Return To Search

Query Tools	
Records	Query
Expressions	Prompts
Fields	Criteria
Having	View SQL
Run	
View All   Rerun Query   Download to Excel   Download to XML	
First 1-100 of 2765 Last	
Row	Authorized ID
1	1378914
2	1375886
3	1668670
4	1727962
5	2644829
6	1331764
7	1367108
8	1377848
9	1293307
10	1378914
11	1373630
12	1378914
13	1136854
14	1367108
15	1375886
16	1377848
17	0104226
18	1378914
19	5470577
20	1378914

# Unions

Unions combine the data resulting from two or more separate queries. A union of two queries can take place only when the queries have the following common elements:

- The same number of selected fields.
- The same data types for all fields.
- The same display order for the columns (aka fields).

Therefore, before creating a union, it is useful to create the queries separately first to identify the information contained in the fields and ensure the same order and data type is selected. Please see the Union Example below.

## Union Example

**Business Question:** We need to create a query that contains information for Project and Expense Managers in the University.

First identify the information contained in the fields, decide how many columns to select, and match the fields in both queries.

1. Create both queries separately using the EX\_APPRV record for the first and the PROJECT\_MGR record for the second query. Select the desired fields and view the results to determine the number of columns and the information that matches.

**Note:** The Query tab can be used to select and deselect fields as needed.

Employee Self Service

Query Tools

Records

Query

Expressions

Prompts

Fields

Criteria

Having

View SQL

Run

View All | Rerun Query | Download to Excel | Download to XML

First 1-100 of 1715 Last

Row	GL Unit	Profile	Approver Oprid	From
17	FIU01	EXPENSE MANAGER	0101395	110301000
18	FIU01	EXPENSE MANAGER	0101395	110302000
19	FIU01	EXPENSE MANAGER	0101487	110401000
20	FIU01	EXPENSE MANAGER	0101487	111110000
21	FIU01	EXPENSE MANAGER	0101487	111120000
22	FIU01	EXPENSE MANAGER	0101487	111150000
23	FIU01	EXPENSE MANAGER	0101487	111160000
24	FIU01	EXPENSE MANAGER	0101487	111170000
25	FIU01	EXPENSE MANAGER	0101487	111180000

Employee Self Service

Query Tools

Records

Query

Expressions

Prompts

Fields

Criteria

Having

View SQL

Run

View All | Rerun Query | Download to Excel | Download to XML

First 1-100 of 15753 Last

Row	Unit	Project	Manager	Proj Role
1	FCN01	608900210	1735391	PROJ_MANAGER
2	FCN01	608900215	1735391	PROJ_MANAGER
3	FCN01	608880400	1735391	PROJ_MANAGER
4	FCN01	608110218	1735391	PROJ_MANAGER
5	FCN01	608540202	1735391	PROJ_MANAGER
6	FSR01	291000503	1400294	PROJ_MANAGER
7	FCN01	600099006	1735391	PROJ_MANAGER
8	FCN01	600099013	1735391	PROJ_MANAGER
9	FCN01	608010303	1735391	PROJ_MANAGER

Matching Fields				
EX_APPRV Record	GL Unit	Profile	Approver Oprid	From
PROJECT_MGR Record	Unit	Proj Role	Manager	Project

2. Create a New Query with a union. Search for EX\_APPRVR- Approvers record. Click Add Record.

The screenshot shows the 'Query Tools' interface. The 'Records' tab is selected. The 'Query Name' is 'New Unsaved Query'. The 'Description' field contains 'EX\_APPRVR'. The 'Search By' dropdown is set to 'Record Name'. The 'Search' button is highlighted. Below the search bar, the 'Search Results' section shows a table with two records: 'EX\_APPRVR - Approvers' and 'EX\_APPRVR\_TYPE - Approver Types.'. The 'Add Record' button for the first record is highlighted.

3. Choose the BUSINESS\_UNIT, APPROVER\_PROFILE, APPROVER\_OPRID, and CHARTFIELD\_FROM. The EX\_APPRVR table is created first. The data in its fields will be combined in a union with the same number of fields and data type contained in the PROJECT\_MGR table as indicated in the table shown in step 1.
- 4.

The screenshot shows the 'Query Tools' interface. The 'Query' tab is selected. The 'Chosen Records' section shows the 'EX\_APPRVR - Approvers' record. The 'Fields' section shows a list of fields: 'BUSINESS\_UNIT\_GL - GL Business Unit', 'APPROVER\_PROFILE - Approver Profile', 'APPROVER\_OPRID - Approver Oprid', 'CHARTFIELD\_FROM - Chartfield From', and 'CHARTFIELD\_TO - Chartfield To'. The first four fields are checked, and the 'CHARTFIELD\_FROM' field is highlighted.

5. Use the [Save As](#) link to save the query.

☒

BUSINESS\_UNIT\_GL - GL Business Unit

☒

APPROVER\_PROFILE - Approver Profile

☒

APPROVER\_OPRID - Approver Oprid

☒

CHARTFIELD\_FROM - Chartfield From

☐

CHARTFIELD\_TO - Chartfield To

Save

Save As

New Query

Preferences

Properties

Publish as Feed

Publish as Pivot Grid

New Union

6. Check the fields order in Fields.

Employee Self Service

Query Tools

New Window | Help | Pe

Records

Query

Expressions

Prompts

Fields

Criteria

Having

View SQL

Run

Query Name

FIU\_FSSS\_EXPENSEPROJECTMGRS

Description

Expense and Project Managers

Feed

Working on selection

Top Level of Query

Subquery/Union Navigation

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

Reorder / Sort

Fields

1-4 of 4

View All

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.BUSINESS_UNIT_GL - GL Business Unit	Char5				GL Unit		Edit	—
2	A.APPROVER_PROFILE - Approver Profile	Char15				Profile		Edit	—
3	A.APPROVER_OPRID - Approver Oprid	Char30				Approver Oprid		Edit	—
4	A.CHARTFIELD_FROM - Chartfield From	Char30				From		Edit	—

Save

Save As

New Query

Preferences

Properties

Publish as Feed

Publish as Pivot Grid

New Union

7. Click the [New Union](#) link in any of the tabs. It will not be available in the Run tab.

☒

CHARTFIELD\_FROM - Chartfield From

☐

CHARTFIELD\_TO - Chartfield To

Save

Save As

New Query

Preferences

Properties

Publish as Feed

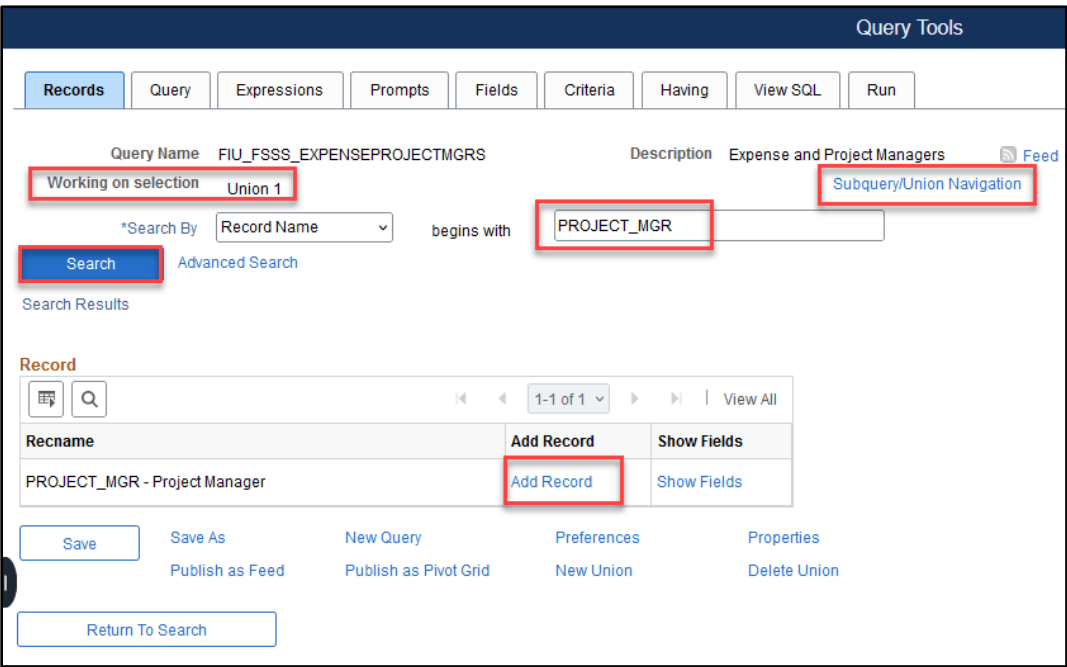
Publish as Pivot Grid

New Union

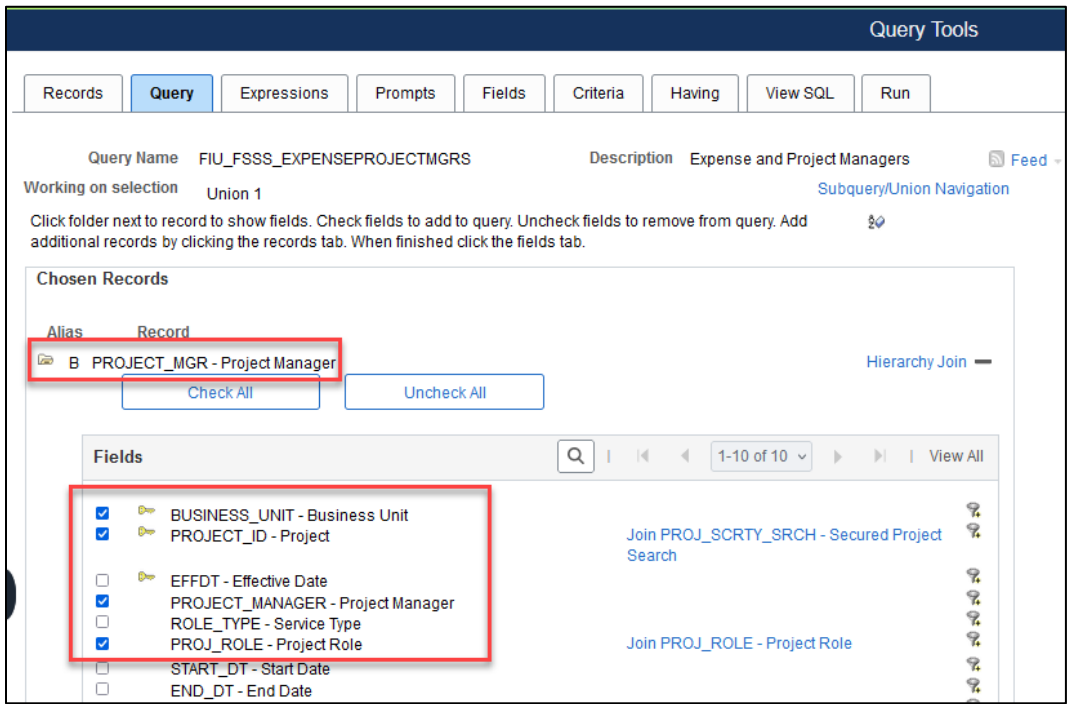
Return To Search

8. The **Records** Tab appears showing **Working on selection** “Union 1.” arch for the PROJECT\_MGR record. Click on [Add Record](#).

**Note:** The [Subquery/Union Navigation](#) appears. It allows navigation between the **Top Level of Query** (EX\_APPRV table) and **Union 1** (PROJECT\_MGR table).



- Select the fields with similar data. Choose BUSINESS\_UNIT, PROJ\_ROLE, PROJECT\_MANAGER, and PROJECT\_ID. The Reorder/Sort functionality will allow you to organize the fields of the union to match the data in the Top Level of Query.



- Select the Fields tab and click on the **Sort/Reorder** Button.

Employee Self Service Query Tools

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

Query Name FIU\_FSSS\_EXPENSEPROJECTMGRS Description Expense and Project Managers [Feed](#)

Working on selection Union 1

View field properties, or use field as criteria in query statement. [Reorder / Sort](#)

**Fields**

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria
1	B.BUSINESS_UNIT - Business Unit	Char5				Unit	<a href="#">%</a>
2	B.PROJECT_ID - Project	Char15				Project	<a href="#">%</a>
3	B.PROJECT_MANAGER - Project Manager	Char11				Manager	<a href="#">%</a>
4	B.PROJ_ROLE - Project Role	Char15				Proj Role	<a href="#">%</a>

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

[Publish as Feed](#)
[Publish as Pivot Grid](#)
[New Union](#)
[Delete Union](#)

[Return To Search](#)

- As indicated in the table shown in step 1 PROJECT\_ROLE matches APPROVER\_PROFILE, PROJECT\_MANAGER matches APPROVER OPRID, and PROJECT ID matches CHARTFIELD\_FROM, so we need to add that order.

Employee Self Service Query Tools

**Edit Field Ordering**

Reorder columns by entering column numbers on the left. Columns left blank or assigned a 0 will be automatically assigned a number. Change the order by number by entering numbers on the right. To remove an order by number, leave the field blank or enter a 0.

**Edit Field Ordering**

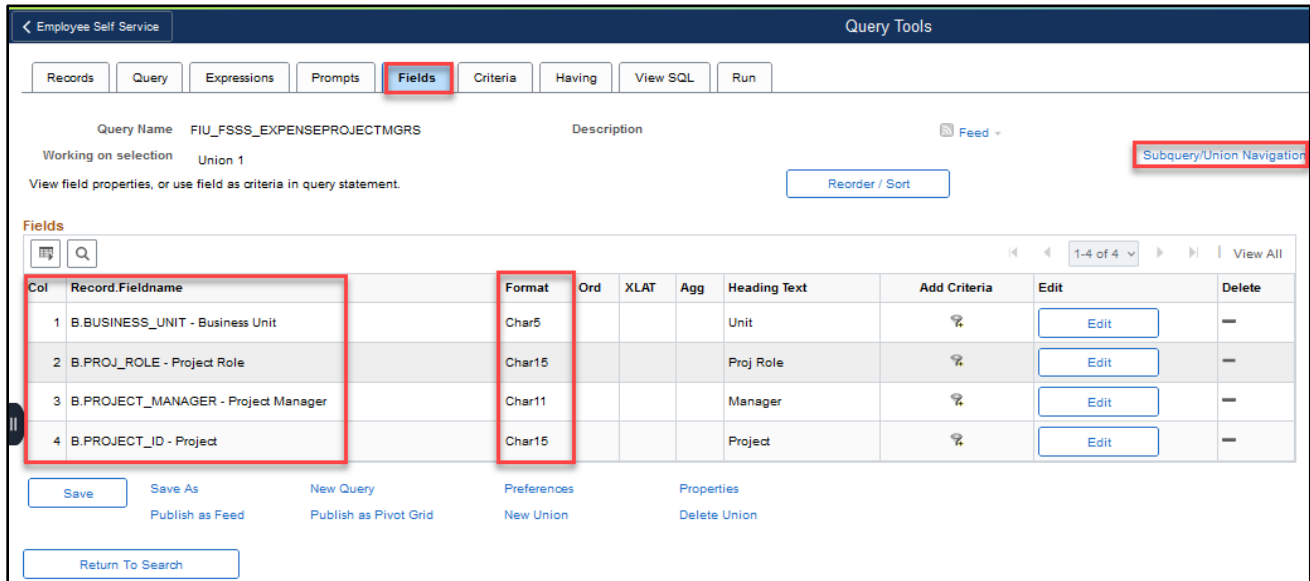
1-4 of 4 | [View All](#)

New Column	Column	Record.FieldName	Order By	Descending	New Order By
	1	B.BUSINESS_UNIT - Business Unit		<input type="checkbox"/>	
4	2	B.PROJECT_ID - Project		<input type="checkbox"/>	
3	3	B.PROJECT_MANAGER - Project Manager		<input type="checkbox"/>	
2	4	B.PROJ_ROLE - Project Role		<input type="checkbox"/>	

[OK](#)
[Cancel](#)



- Verify the fields in the union by clicking the **Fields** Tab. The fields used in the Top-Level of Query can be viewed by toggling. Click the [Subquery/Union Navigation](#) link.



Employee Self Service Query Tools

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

Query Name FIU\_FSSS\_EXPENSEPROJECTMGRS Description Feed

Working on selection Union 1

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

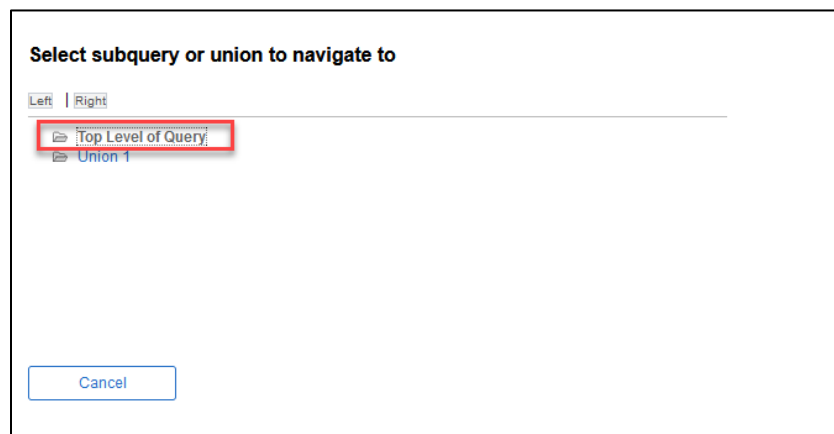
**Fields**

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	B.BUSINESS_UNIT - Business Unit	Char5				Unit		Edit	—
2	B.PROJ_ROLE - Project Role	Char15				Proj Role		Edit	—
3	B.PROJECT_MANAGER - Project Manager	Char11				Manager		Edit	—
4	B.PROJECT_ID - Project	Char15				Project		Edit	—

Save Save As New Query Preferences Properties  
Publish as Feed Publish as Pivot Grid New Union Delete Union

Return To Search

- Click Top Level of Query to see Record A.



Select subquery or union to navigate to

Left | Right

Top Level of Query

Union 1

Cancel

- The system goes back to the **Query** tab. Click the **Fields** tab to finish reviewing the Top-Level of Query fields.

Employee Self Service Query Tools

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

Query Name FIU\_FSSS\_EXPENSEPROJECTMGRS Description Expense and Project Managers Feed

Working on selection Top Level of Query Subquery/Union Navigation

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 EX\_APPRVR - Approvers Hierarchy Join

Employee Self Service Query Tools

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

Query Name New Unsaved Query Description Feed

Working on selection Top Level of Query Subquery/Union Navigation

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

**Fields**

1-4 of 4 View All

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.BUSINESS_UNIT_GL - GL Business Unit	Char5				GL Unit		<input type="button" value="Edit"/>	
2	A.APPROVER_PROFILE - Approver Profile	Char15				Profile		<input type="button" value="Edit"/>	
3	A.APPROVER_OPRID - Approver Oprid	Char30				Approver Oprid		<input type="button" value="Edit"/>	
4	A.CHARTFIELD_FROM - Chartfield From	Char30				From		<input type="button" value="Edit"/>	

- Before selecting run, make sure to answer the three important Union tests:
  - Do you have the same number of output columns? In this example there are 4.
  - Do you have the same data type? Yes, the data in the fields of the Top Level of Query match the data in the fields of Union 1. Refer to the screenshot and the table in step 1.
  - Are they in the same display order? Yes: BUSINESS\_UNIT, PROJECT\_ROLE / APPROVER\_PROFILE, PROJECT\_MANAGER / APPROVER OPRID, and PROJECT ID/ CHARTFIELD\_FROM.

Then click the **Run** tab.

Employee Self Service Query Tools

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

Query Name FIU\_FSSS\_EXPENSEPROJECTMGRS Description Expense and Project Managers Feed

Working on selection Top Level of Query Subquery/Union Navigation

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

**Fields**

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.BUSINESS_UNIT_GL - GL Business Unit	Char5				GL Unit		Edit	—
2	A.APPROVER_PROFILE - Approver Profile	Char15				Profile		Edit	—
3	A.APPROVER_OPRID - Approver Oprid	Char30				Approver Oprid		Edit	—
4	A.CHARTFIELD_FROM - Chartfield From	Char30				From		Edit	—

Save Save As New Query Preferences Properties  
Publish as Feed Publish as Pivot Grid New Union

Return To Search

The results show approximately 17468 rows of data for both Project Managers and Expense Managers and display the headings from the first record.

Employee Self Service

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

View All | Rerun Query | Download to Excel | Download to XML First 601-700 of 17468 Last

Row	GL Unit	Profile	Approver Oprid	From
660	FCN01	PROJ_MANAGER	1735391	608900638
661	FCN01	PROJ_MANAGER	1735391	608900639
662	FCN01	PROJ_MANAGER	1735391	608900640
663	FCN01	PROJ_MANAGER	1735391	608900641
664	FCN01	PROJ_MANAGER	1735391	608900705
665	FIU01	EXPENSE MANAGER		110813000
666	FIU01	EXPENSE MANAGER		110871000
667	FIU01	EXPENSE MANAGER		110882000
668	FIU01	EXPENSE MANAGER		110884000
669	FIU01	EXPENSE MANAGER		110912000
670	FIU01	EXPENSE MANAGER		111011000
671	FIU01	EXPENSE MANAGER		111020000
672	FIU01	EXPENSE MANAGER		123590000
673	FIU01	EXPENSE MANAGER		124402000
674	FIU01	EXPENSE MANAGER		151710000
675	FIU01	EXPENSE MANAGER		152930000
676	FIU01	EXPENSE MANAGER		202090000
677	FIU01	EXPENSE MANAGER		252000000
678	FIU01	EXPENSE MANAGER		255000000
679	FIU01	EXPENSE MANAGER		298000000
680	FIU01	EXPENSE MANAGER		334000000
681	FIU01	EXPENSE MANAGER	0101395	110301000
682	FIU01	EXPENSE MANAGER	0101395	110302000
683	FIU01	EXPENSE MANAGER	0101487	110401000

# Managing Queries

## Schedule a Query

Schedule Query enables users to run a query process in the background and deliver it at a predetermined day, time, and delivery method. There are two ways to schedule a query, from the **Schedule Query** navigation and from the [Schedule](#) link found in Search Results.

From the **Schedule Query** navigation within either the Reporting Database or Production environment following these steps:

1. Click the **Add a New Value** tab to create a Run Control ID. Give it a unique name and click **Add**. Spaces and symbols are not allowed in a run control name.

The screenshot shows the 'Schedule Query' interface. On the left is a navigation pane with 'Query Manager', 'Query Viewer', and 'Schedule Queries' (highlighted). The main area has a 'Schedule Query' title and two tabs: 'Find an Existing Value' and 'Add a New Value' (selected). Below the tabs is a text input field for '\*Run Control ID' containing 'OY\_TrانData'. Below this is a blue 'Add' button. At the bottom, there are links for 'Find an Existing Value' and 'Add a New Value'. The top right corner shows 'Environment: PSFSRPT'.

2. Select a query by clicking **Search** or type the name of the query into the **Query Name** field.

The screenshot shows the 'Schedule Query' interface. At the top right, it says 'Environment: PSFSRPT refreshed on FRI, MAR. 03, 2023' with a 'Hide' link. Below this is a 'Query Tools' header. The main area has a 'Schedule Query' title. Below the title, it shows 'Run Control ID OY\_TrانData' and links for 'Report Manager' and 'Process Monitor'. There is a 'Run' button. Below this is a 'Query Name' field and a 'Search' button. Below the 'Query Name' field is a '\*Description' field. At the bottom, there are buttons for 'Save', 'Add', and 'Update/Display'.

**Scheduled Query Search Page**

\*Query Type:

Query:

**Query**

1-12 of 5422   View 100		
FIU_FSSS_AMOUNT		Private
FIU_FSSS_EXPRESSIONS	Manual	Private
FIU_FSSS_LF_AND	Voucher Example pp.36	Private
FIU_FSSS_LF_JOINS	Standard Join Example	Private
FIU_FSSS_LF_JOINS_OY	Left outer join example	Private
FIU_FSSS_SPEEDTYPE_OY	Athletics Speedtypes	Private
FIU_FSSS_SUBQUERY	Manual	Private
FIU_FSSS_UNION	Manual	Private
1099C_CUST_DATA	Input to 1099C Crystal	Public
1099_SSN_GT_999	1099 with SSN >999999990	Public
1099_SSN_LT_0	1099 with SSN <0	Public

From the search results, select the query by clicking on the name.

**Scheduled Query Search Page**

\*Query Type:

Query:

**Query**

1-7 of 7   View All		
TRANDATA_BYDATE	TranData_byDate_with Alt Acct	Public
TRANDATA_BYDATE_CONTROLLER	TranData_byDate_with_Activity#	Public
TRANDATA_BYDATE_CONTROLLER2	TranData_byDate_with_Activity#	Public
TRANDATA_BYDATE_JRNLDESCR	TranData_byDate_with Alt Acct	Public
TRANDATA_BYDATE_RD	TranData_byDate_with_Activity#	Public
TRANDATA_BYPCARD	COB	Public
TRANDATA_COM	Trandata Data College of Med	Public

Some queries may have prompts or criteria that must be entered before scheduling. Enter any required information.

Help

## TRANDATA\_BYDATE

---

\*Journal Date From

\*Journal Date Through

Dept or Proj ID or 123%

3. The chosen query and parameters will be displayed. Click the [Update Parameters](#) link to make any changes and click **Save**. After saving, click **Run**.

Run Control ID

OY\_TranData

Report Manager

Process Monitor

Query Name

TRANDATA\_BYDATE

\*Description

TranData\_byDate\_with Alt Acct

[Update Parameters](#)

Prompt Name	Value
JRNL_DATE_FROM	2021-07-01
JRNL_DATE_THRU	2022-06-30
DEPTID	102600000

- The **Process Scheduler Request** screen appears. This screen has options for scheduling recurrence, date, time, and output options.

Query Tools

**Process Scheduler Request**

User ID 2216854 Run Control ID OY\_TranData

Server Name

Run Date 03/03/2023

Recurrence

Run Time 4:28:36PM

Time Zone

[Reset to Current Date/Time](#)

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web	TXT	Distribution

**Recurrence options:**

Recurrence

Time Zone

List

Description

PSQUERY

Daily Purge

M-F at 5pm

PerfMon Reaper Recurrence

**Run Date options:** Use the calendar to choose a specific date.

Run Date 03/03/2023

Run Time 4:28:36PM

Process Type Application Engine

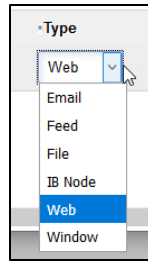
**Calendar**

March 2023

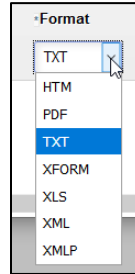
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

< [Current Date](#) >

Output options can be chosen under **Type** drop-down. Web and Email are the most common options. Email will email the query at the desired day and time. The Web option will produce the query result on screen.



**Format** is the type of file that will be produced. TXT for a CSV file or XLS for an Excel spreadsheet file are the most common.



5. After choosing all the parameters of the schedule, click **OK**.

**Process Scheduler Request**

User ID 2216854 Run Control ID OY\_TranData

Server Name  Run Date 03/03/2023

Recurrence  Run Time 4:28:36PM

Time Zone

**Process List**

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web	TXT	Distribution

A Process Instance number will appear, this confirms that the schedule is created and will process at the date and time and recurrence indicated.

**Schedule Query**

Run Control ID OY\_TranData [Report Manager](#) [Process Monitor](#)

Query Name   **Process Instance: 8654730**

\*Description

[Update Parameters](#)

Prompt Name	Value
JRNL_DATE_FROM	2021-07-01
JRNL_DATE_THRU	2022-06-30
DEPTID	102600000



## Email a Query

To schedule a query to be emailed at specific days and times, follow steps 1-4 in the Schedule Query section.

1. On the **Process Scheduler Request** screen, make sure to choose **Email** as a Type instead of Web. Also, click the [Distribution](#) link to enter email address(es).

**Process Scheduler Request**

User ID 2216854 Run Control ID OY\_TRANDATA

Server Name  Run Date 03/03/2023

Recurrence  Run Time 4:46:17PM

Time Zone

**Process List**

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Email	TXT	<a href="#">Distribution</a>

2. There are options to enter an **Email Subject**, **Message Text**, **Email Address List**. Click **OK**.

**Distribution Detail**

Process Name PSQUERY

Process Type Application Engine

Folder Name

Retention Days 90

**Email Only**

Email Subject  Email With Log: ☐ Email Web Report: ☐

Message Text

Email Address List

Override Sender Email Id: ☐

**Distribute To**

ID Type	Distribution ID		
User	1111111	<input type="button" value="Search"/>	<input type="button" value="+"/> <input type="button" value="-"/>

The email arrives at the scheduled date and time.

Tran Data Query

10:00 AM 03/03/2023

fin-pantherid@fiu.edu

To: Odette Yero; Odette Yero

Follow up. Start by Friday, March 10, 2023. Due by Friday, March 10, 2023.

TRANDATA\_BYDATE-8665778.csv 922 KB

Latest Tran Data Query emailed.

## Adding Queries to My Favorite Queries

Place frequently used queries in the My Favorite Queries list for easy access. This option is available through Query Manager as well as Query Viewer.

**To add a query to the My Favorite Queries list:**

1. On the Query Manager Search Results page, select the query and add it to the My Favorite Queries list (click the box to the left of the query). It will appear as follows:

<a href="#">Check All</a>		<a href="#">Uncheck All</a>		*Action		<div>-- Choose --</div>	<a href="#">Go</a>
Query							
<div><div><div></div></div><div><div></div></div></div>							
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	
<input checked="" type="checkbox"/>	FIU_FSSS_AMOUNT	Transaction Amount	Private		<a href="#">Edit</a>	<a href="#">HTML</a>	
<input type="checkbox"/>	FIU_FSSS_EXPRESSIONS	Manual	Private		<a href="#">Edit</a>	<a href="#">HTML</a>	

2. Select *Add to Favorites* from the Action drop-down list box.

Search Results

Too many items met your search criteria. Only the first 300 items displayed.

Check All

Uncheck All

\*Folder View

-- All Folders --

\*Action

-- Choose --

-- Choose --

Add to Favorites

Copy to User

Delete Selected

Move to Folder

Rename Selected



Go

Query

Select	Query Name	Descr			Edit	Run to HTML	Run to Excel
<input checked="" type="checkbox"/>	FIU_FSSS_AMOUNT	Transaction Amount			Edit	HTML	Excel

3. Click Go.

The query appears in the My Favorite Queries list group box.

<b>My Favorite Queries</b>								
 								
Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
FIU_FSSS_AMOUNT	Transaction Amount	Private		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<a href="#">Clear Favorites List</a>								

## Copying a Query to Another User's List of Queries

The Query Manager allows users to copy a private query to another individual to view that private query. It is important to note that users can only copy **Private** queries to another user's list of queries.

If the intended user does not have permission to access all the records in a copied query, that query will not appear in the target user's list of queries. Some queries are also created within one environment versus another e.g., Production vs Reporting. The intended user must also have access to that environment to view the query.

Once the query is copied, it will then appear in the intended user's list of queries in Query Viewer.

Click on the **Query Tools** Tile, and **Query Manager**:

**To copy a query to another user's list of queries:**

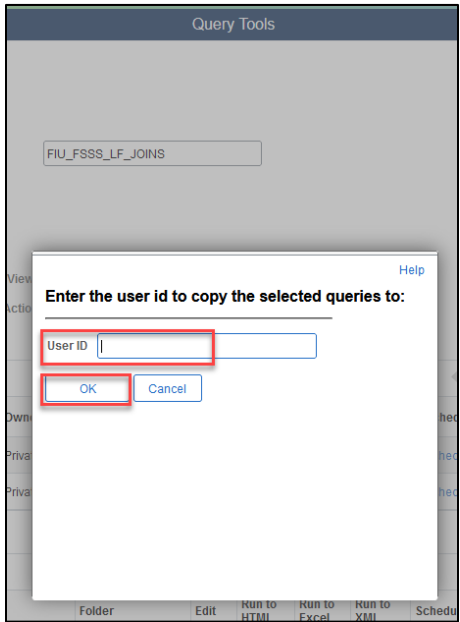
1. On the Query Manager Search Results page, select or search for the query or queries that are intended for another user.

The screenshot shows the 'Query Manager' interface. At the top, there's a search bar with 'Query Name' selected and 'FIU\_FSSS\_LF\_JOINS' entered. Below the search bar, there's a 'Search' button and a 'Go' button. The 'Search Results' section shows a table with columns: Select, Query Name, Descr, Owner, Folder, Edit, Run to HTML, Run to Excel, Run to XML, Schedule, and Definitional References. The first row is 'FIU\_FSSS\_LF\_JOINS' with 'Standard Join Example' as the description and 'Private' as the owner. The 'Action' dropdown menu is open, showing options: -- Choose --, Add to Favorites, Copy to User (highlighted), Delete Selected, Move to Folder, and Rename Selected. The 'Copy to User' option is highlighted.

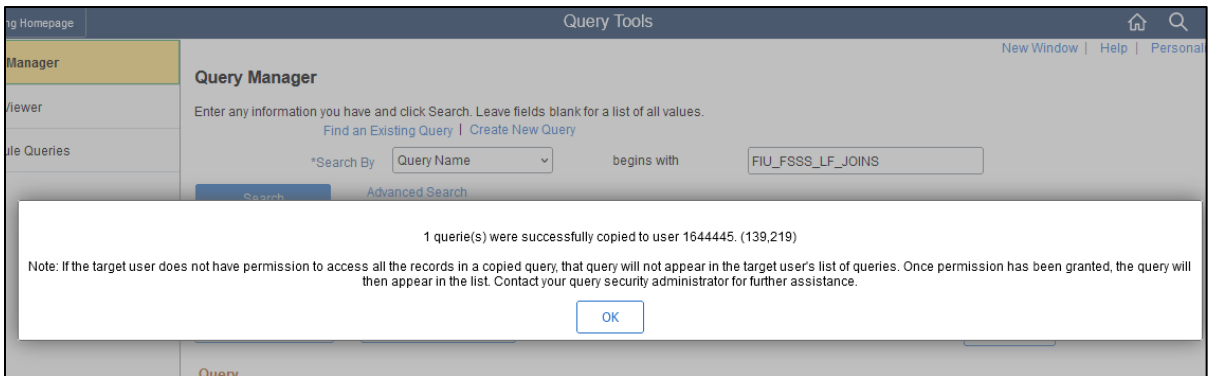
2. Select **Copy to User** from the *Action drop-down* list. Click **Go**.

The screenshot shows the 'Query Manager' interface. At the top, there's a search bar with 'Query Name' selected and 'FIU\_FSSS\_LF\_JOINS' entered. Below the search bar, there's a 'Search' button and a 'Go' button. The 'Search Results' section shows a table with columns: Select, Query Name, Descr, Owner, Folder, Edit, Run to HTML, Run to Excel, Run to XML, Schedule, and Definitional References. The first row is 'FIU\_FSSS\_LF\_JOINS' with 'Standard Join Example' as the description and 'Private' as the owner. The 'Action' dropdown menu is open, showing options: -- Choose --, Add to Favorites, Copy to User (highlighted), Delete Selected, Move to Folder, and Rename Selected. The 'Copy to User' option is highlighted.

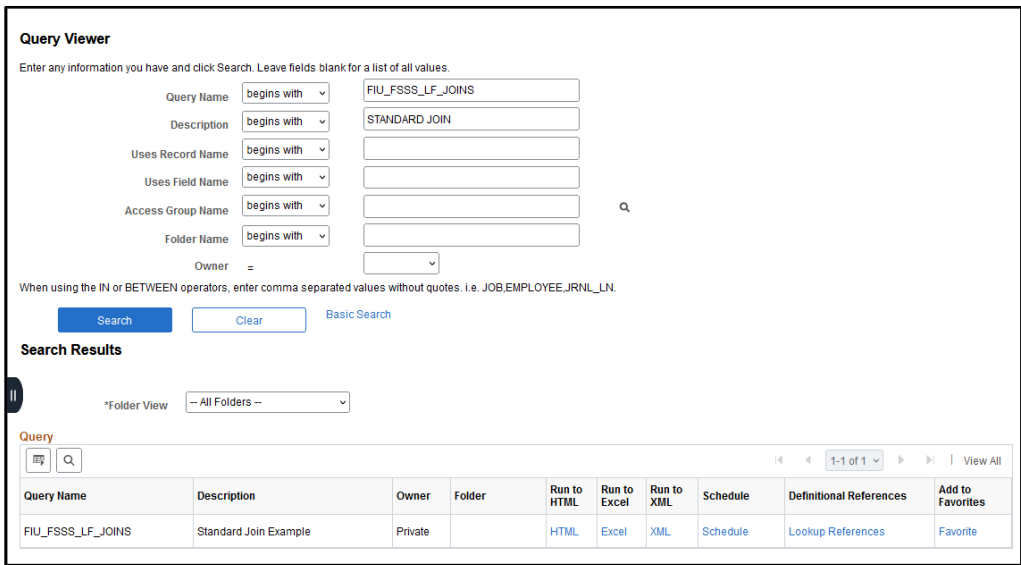
3. Enter the Panther ID of the intended user. Click **OK**.



4. A message will appear indicating the query was successfully copied to the designated user.



5. The intended user must then navigate to the environment in which the query was created (Reporting or Production), go to **Query Tools**, then to **Query Viewer**, and search for the name of the query that was copied. Please note that no email is generated to advise the user about the copied query.



## Moving a Query to an Organization Folder

Folders are a tool within **Query Manager** to help users organize queries under a common heading. To move a query to an organization folder:

1. On the Query Manager Search Results page, select the query or queries to move to an organization folder.

Environment: PSFSRPT refreshed on MON, MAR. 20, 2023 Hide

Query Tools

**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  begins with

[Advanced Search](#)

**Search Results**

\*Folder View  \*Action

Query

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References
<input checked="" type="checkbox"/>	FIU_FSSS_LF_AND	Voucher Example pp.36	Private		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>
<input checked="" type="checkbox"/>	FIU_FSSS_LF_JOINS	Standard Join Example	Private		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>
<input checked="" type="checkbox"/>	FIU_FSSS_LF_JOINS_OY	Left outer join example	Private		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>

2. Select **Move to Folder** from the Action drop-down. Click **Go**.

Environment: PSFSRPT refreshed on MON, MAR. 20, 2023 Hide

Query Tools

**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  begins with

[Advanced Search](#)

**Search Results**

\*Folder View  \*Action

Query

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References
<input checked="" type="checkbox"/>	FIU_FSSS_LF_AND	Voucher Example pp.36	Private		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>
<input checked="" type="checkbox"/>	FIU_FSSS_LF_JOINS	Standard Join Example	Private		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>
<input checked="" type="checkbox"/>	FIU_FSSS_LF_JOINS_OY	Left outer join example	Private		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>

- The **Move to Folder** box will appear. Choose an existing folder from *All Folder dropdown* or choose to enter the name of a new folder. Click **OK**.

### Move to Folder

Select an existing folder to move to:

☐ -- All Folders --

OR enter a folder name to move to:

☒ Odette Training

OK

Cancel

Queries moved into a specific named folder are now searchable within **Query Viewer** or **Query Manager** using the **Folder Name** Advanced Search field.

Query Tools

### 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](#)

Query Name begins with

Description begins with

Uses Record Name begins with

Uses Field Name begins with

Access Group Name begins with

**Folder Name** contains ODETTE TRAINING

Owner =

Q

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL\_LN.

Search

Clear

[Basic Search](#)

#### Search Results

Check All

Uncheck All

\*Folder View -- All Folders --

\*Action Move to Folder

Go

**Query**

☐ ☐

1-3 of 3

View All

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References
<input type="checkbox"/>	FIU_FSSS_LF_AND	Voucher Example pp.36	Private	ODETTE TRAINING	<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>
<input type="checkbox"/>	FIU_FSSS_LF_JOINS	Standard Join Example	Private	ODETTE TRAINING	<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>
<input type="checkbox"/>	FIU_FSSS_LF_JOINS_OY	Left outer join example	Private	ODETTE TRAINING	<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>

## Renaming a Private Query

To rename a private query, a user must be the owner of the query. Navigate to **Query Manager**.

1. On the **Query Manager** page click **Search**. This will initiate the **Action** drop-down choices.

Environment: PSFSRPT refreshed on MON, MAR. 20, 2023 Hide

Query Tools

**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  begins with

**Search** [Advanced Search](#)

2. Select the checkbox next to the query to be renamed. Then choose the “Rename Selected” option from the Action drop-down. Click **Go**.

**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  begins with

**Search** [Advanced Search](#)

**Search Results**

Too many items met your search criteria. Only the first 300 items displayed.

\*Folder View

\*Action

**Query**

☐ ☐ ☒ ☐

Select	Query Name	Descr		Edit	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References
<input type="checkbox"/>	FIU_FSSS_AMOUNT	Transaction Amount		Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	FIU_FSSS_EXPRESSIONS	Manual	Private	Edit	HTML	Excel	XML	Schedule	Lookup References
<input checked="" type="checkbox"/>	FIU_FSSS_LF_AND	Voucher Example pp.36	Private	Edit	HTML	Excel	XML	Schedule	Lookup References
<input type="checkbox"/>	FIU_FSSS_LF_JOINS	Standard Join Example	Private	Edit	HTML	Excel	XML	Schedule	Lookup References

3. Enter the new desired name of the query in the New Name box, then click **Ok**.

Query Tools

**Rename Queries**

Enter new names for the queries on the right.

**Rename Queries**

☐ ☐

Query Name	Owner	New Name
FIU_FSSS_LF_AND	Private	<input type="text" value="FIU_FSSS_LF_AND_OY"/>