

Using PeopleSoft Query Manager

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

The first screen of Query Manager gives users the option to search for a Query, create a new Query, and displays any previously selected Favorite Queries.

Searching

Basic search uses the Operator “Begins With” in multiple criteria:

- Access Group Name
- Description
- Folder Name
- Owner
- Query Name
- Type
- Uses Field Name
- Uses Record Name

Advanced Search has more search functionality with operators:

- <
- <=
- =
- >
- >=
- Begins With
- Between
- Contains
- In
- Not =

Using Wildcards

PeopleSoft allows wildcard use.

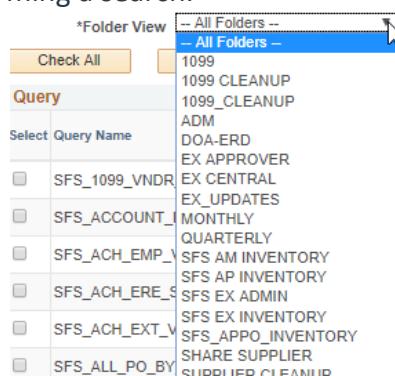
- _ matches any single character. For example, _ones matches any five-character string ending with "ones", such as "Jones" or "Cones".
- % matches any string of zero or more characters. For example, C% matches any string starting with C, including C alone.

To use one of the wildcard characters as a literal character (for example, to include a % in your string), precede the character with a \ (for example, percent\%).

Options

Refine Results by Folder

Select a folder from the Folder View drop-down to further refine the search. This field will appear only after first performing a search.



Edit the Query

To edit a query, click on the hyperlink Edit (to the right of the folder name in the list of results). This will open the query in Query Manager. ****SFS_** queries should only be edited by UWSA staff.

Run the Query

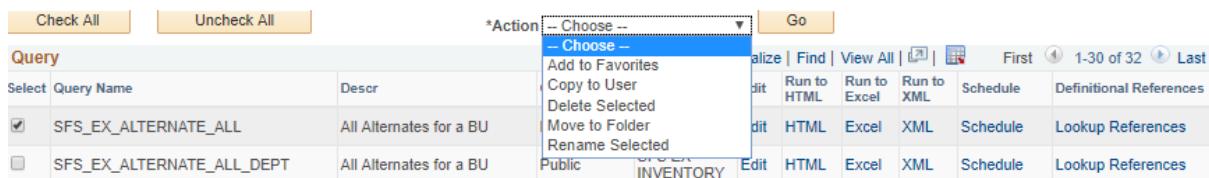
Results can be run to:

- HTML
- XML
- Excel
- Schedule

Query									Personalize	Find	View All	Print	First	1-29 of 29	Last
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References					
<input type="checkbox"/>	SFS_EX_ALTERNATE_ALL	All Alternates for a BU	Public	SFS EX INVENTORY	Edit	HTML	Excel	XML	Schedule	Lookup References					
<input type="checkbox"/>	SFS_EX_ALTERNATE_ALL_DEPT	All Alternates for a BU	Public	SFS EX INVENTORY	Edit	HTML	Excel	XML	Schedule	Lookup References					
<input type="checkbox"/>	SFS_EX_ALTERNATE_TERMINATED	Terminated Alternates	Public	SFS EX INVENTORY	Edit	HTML	Excel	XML	Schedule	Lookup References					

Select Options

To the left of the list of results are checkboxes. One or more Queries can be selected. You can then bring up the list of available actions by selecting the drop-down menu from the Actions field.



The screenshot shows a list of queries with checkboxes. The first query, 'SFS_EX_ALTERNATE_ALL', has a checked checkbox. A dropdown menu is open over the 'Actions' field, showing options: 'Choose', 'Add to Favorites', 'Copy to User', 'Delete Selected', 'Move to Folder', and 'Rename Selected'. The 'Choose' option is highlighted. The background 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 'Edit' column contains hyperlinks for each query.

Available actions are:

- **Add to Favorites** - Adds the query to the users list of favorite queries. It will display below query search results.
- **Copy to User** - Allows the query creator to share the private query with one or more other users. Used typically with Private Queries.
- **Delete Selected** - Permanently delete the selected query or queries.
- **Move to Folder** - Removes the query from its current folder and add it to the newly selected folder.
- **Rename Selected** - Renames the selected query. Every query must have a unique name, regardless of whether it is private or public.