PeopleSoft®

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Query

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Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Query
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Contents

About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Enterprise PeopleTools 8.45 PeopleBook: Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplesoftpress@mmapartner.com.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
" " (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).

Typographical Convention or Visual Cue	Description
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

If the note is preceded by *Important!*, the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

See *About These PeopleBooks*, “ISO Country and Currency Codes,” ISO Country Codes.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

See Appendix D, “ISO Country and Currency Codes,” ISO Currency Codes.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date The last date for which a report or process includes data.

Business Unit An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

Description Enter up to 30 characters of text.

Effective Date The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when

	you can view and change the information. Pages or panels and batch processes that use the information use the current row.
Once, Always, and **Don't Run**	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler

Enterprise PeopleTools 8.45 PeopleBook: Using PeopleSoft Applications

PeopleSoft Query Preface

This preface provides a general overview of the contents discussed in PeopleSoft Query.

PeopleSoft Query

PeopleSoft Query is an end user reporting tool. This book explains the basic concepts of selecting data, how to design simple and complex queries, and how to send query results to other reporting tools.

To take full advantage of the information covered in this book, PeopleSoft recommends that you have a basic understanding of how to use PeopleSoft applications. You should also be comfortable using Microsoft Windows.

This book assumes that you are familiar with PeopleTools. It also assumes a basic familiarity with relational database concepts and SQL.

CHAPTER 1

Getting Started with PeopleSoft Query

This chapter provides an overview of PeopleSoft Query and discusses:

- PeopleSoft Query business processes.
- PeopleSoft Query implementation.
- Other sources of information.

PeopleSoft Query Overview

With PeopleSoft Query, you can extract the precise information that you're looking for by using visual representations of your PeopleSoft database, without writing Structured Query Language (SQL) statements. The queries that you write can be as simple or as complex as necessary; they can be one-time queries or queries that you use repeatedly.

You can use PeopleSoft Query in the following ways:

- To display data in a grid (on the Run tab).

  Preview queries within Query Manager, displaying the result set in a grid for review. This option is useful as you refine your queries.

- To run queries as a separate process.

  You can run queries as a separate process and have results sent to a separate browser window by selecting the Run option from Query Manager or Query Viewer.

- To schedule a query.

  You can choose to schedule queries so that they run at predefined times or on recurring schedules. The results of scheduled queries are routed to PeopleSoft Report Manager.

- To download query results to an Excel spreadsheet.

  Choose to have the data downloaded and formatted as a Microsoft Excel spreadsheet. This option is available in your query search results, or after you run or schedule a query.

- To serve as a data source for Crystal Reports.

  With Crystal Reports, you can apply advanced formatting to the output of your queries. If you have access to the Windows version of Query Designer, you can run improvised or predefined queries directly to Crystal Reports. Users who do not have the Windows client installed can schedule a predefined Crystal Report to run on a Process Scheduler server, and the results can be routed to PeopleSoft Report Manager.

  You also launch your Crystal reports from PeopleSoft Query.

  See *Enterprise PeopleTools 8.45 PeopleBook: Crystal Reports for PeopleSoft*, "Using Crystal Reports," Launching Crystal Reports With PeopleSoft Query.

See *Enterprise PeopleTools 8.45 PeopleBook: Crystal Reports for PeopleSoft*, "Using Crystal Reports".

- To determine to whom to forward information.

  Write queries that PeopleSoft Workflow uses to determine to whom to send emails, forms, or worklist entries. This type of query is called a *role query*.

  See *Enterprise PeopleTools 8.45 PeopleBook: Workflow Technology*, "Introducing PeopleSoft Workflow".

- To create a data source for PeopleSoft nVision reports.

  PeopleSoft nVision can use queries as a data source.

  See *Enterprise PeopleTools 8.45 PeopleBook: PS/nVision*, "Understanding PS/nVision".

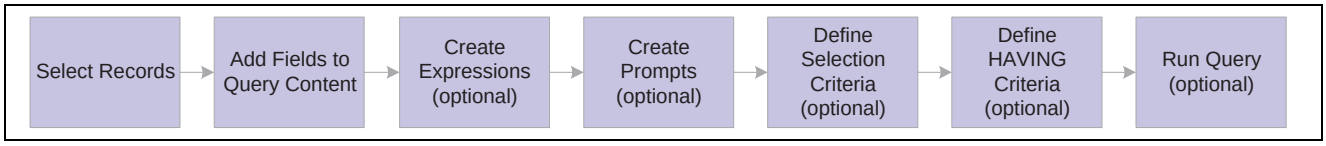
- To serve as a data source for defining online analytical processing (OLAP) Cube Manager dimensions and facts.

  Queries are a primary data source for PeopleSoft Cube Manager, which you can use to build OLAP cubes.

  See *Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Cube Manager*, "Introducing PeopleSoft Cube Manager".

PeopleSoft Query Business Processes

The following process flow illustrates the PeopleSoft Query business processes:



PeopleSoft Query business process flow

PeopleSoft Query Implementation

PeopleSoft Query is automatically installed with your Enterprise PeopleTools installation.

Before using PeopleSoft Query, you must first set up query security:

Step	Reference
1. Define query profiles.	See *Enterprise PeopleTools 8.45 PeopleBook: Security Administration*, "Implementing Query Security," Defining Query Profiles.
2. Build query access group trees.	See *Enterprise PeopleTools 8.45 PeopleBook: Security Administration*, "Implementing Query Security," Building Query Access Group Trees.

Step	Reference
3. Work with query trees.	See *Enterprise PeopleTools 8.45 PeopleBook: Security Administration*, "Implementing Query Security," Working with Query Trees.
4. Define row-level security and query security records.	See *Enterprise PeopleTools 8.45 PeopleBook: Security Administration*, "Implementing Query Security," Defining Row-Level Security and Query Security Records.

Other Sources of Information

This section provides information to consider before you begin to use PeopleSoft Query.

In addition to implementation considerations presented in chapter section, take advantage of all PeopleSoft sources of information, including the installation guides, release notes, PeopleBooks, red papers, the Updates + Fixes area of Customer Connection and PeopleSoft's curriculum courses.

See Also

"PeopleSoft Query Preface," page xiii

Enterprise PeopleTools 8.45 PeopleBook: Getting Started with Enterprise PeopleTools

CHAPTER 2

Creating and Running Simple Queries

This chapter provides an overview of query types, lists prerequisites and common elements, and discusses how to:

- Create new queries.
- Save queries.
- Run queries.
- Add queries to the Internet Explorer Favorites list.
- Download queries.
- Perform lookups.
- Print query results.
- Use Query Viewer.

Understanding Query Types

PeopleSoft Query provides the following different types of queries:

User query

User queries retrieve data from the database directly from Windows-based Query Designer, or the web-based Query Manager/Query Viewer applications.

Note. Because of the range of possible circumstances in which you might run an ad hoc query, there are no special considerations or requirements that apply to all of them.

Reporting query

Reporting queries are essentially 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 ad hoc queries, scheduled queries, Crystal Reports, PS/nVision, or Cube Manager.

When you define a custom report, you often include runtime variables that users specify when they run the report. For example, you might want users to be able to say which business unit, location, or time period to report on. Therefore, your reporting query may include one or more runtime prompt variables.

If your query requires input parameters, you must decide how users should enter them. If they run the report from any of the PeopleSoft Query applications, they can enter values into the dialog box that appears in Query Manager, Query Viewer, or Scheduled Query.

When reporting queries are used as a data source to another third party reporting product, you may need to:

- Create or modify a page to collect the necessary input parameters.
- Create or modify a record definition, based on the input parameters.
- Add a process definition to PeopleSoft Process Scheduler.

See *Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler*, "Defining PeopleSoft Process Scheduler Support Information," Adding New Process Definitions.

See Chapter 3, "Defining Selection Criteria," page 27.

Process query

Process queries are queries that you intend to run periodically using a batch process. Create these automated batch processes using PeopleSoft Application Engine and the Query API. For example, you could write a query that returns any overdue receivables and schedule a batch process to run the query once a week.

Note. Process and role queries override the automatic row-level query security logic that is applied to all other types of queries. For this reason, you should restrict access to creating these types of queries to administrative roles and not include any sensitive data columns in the select list for these types of queries. You can restrict access to creating/modifying these queries based on Query Profile settings assigned to a Permission List. Also note that Workflow queries also override the row-level security logic.

Role query

PeopleSoft Workflow uses role queries to determine to whom to send an email, form or worklist entry to. A role query needs to return one or more role IDs based on the data that has been saved on the page that is triggering the routing.

Because a role query returns a list of role users, the record definition that you want is either PSROLEUSER (which lists role users and the roles to which they are assigned) or ROLEXLATOPR (which lists role users and their IDs).

The only field that you will select in your query is ROLEUSER. Of course, you will use other fields and join to other record definitions to specify the criteria that role users can select. But no matter how complex the query is—how many joins or selection criteria it has—it must return ROLEUSER and nothing more.

Define a role as a query because you want to route items differently based on the context of the transaction that the users are performing. Thus, every role query contains at least one bind variable whose value gets set at run time. The bind variable or variables correspond to the data on which you want to base the routing decision. At run time, the system sets the values of the bind variables based on data from the page that triggers the event.

Save your role queries with names that begin with [ROLE] so that you can identify them as role queries.

Note. Process and role queries override the automatic row-level query security logic that is applied to all other types of queries. For this reason, you should restrict access to creating these types of queries to administrative roles and not include any sensitive data columns in the select list for these types of queries. You can restrict access to creating/modifying these queries based on Query Profile settings that are assigned to a Permission List. Also note that Workflow queries also override the row-level security logic.

See *Enterprise PeopleTools 8.45 PeopleBook: Workflow Technology*, "Introducing PeopleSoft Workflow".

Archive query

You can save a query as this type if you have access to workflow queries. These queries are generally only used by the PeopleSoft Data Archive Manager.

See *Enterprise PeopleTools 8.45 PeopleBook: Data Management*, "Using PeopleSoft Data Archive Manager".

Note. Archive queries can only be created and saved as *public*.

PS/nVision query

Use PeopleSoft Query to create a query in order to specify the data source for a PS/nVision report layout. However, if you want to use your query in a PS/nVision matrix layout, you must apply aggregate functions to at least one column.

Queries used with PS/nVision tabular layouts do not have the same restrictions as matrix layout queries; they are like other reporting queries and do not require an aggregate column.

See Chapter 5, "Working with Advanced Query Options," page 55.

See *Enterprise PeopleTools 8.45 PeopleBook: PS/nVision*, "Using Layouts," Understanding Layouts.

Prerequisites

Before you can create a new query, navigate to the Query Manager search page.

To begin defining a new query:

1. Select Reporting Tools, Query, Query Manager.

   The Query Manager search page appears.

2. Click the Create New Query link to open the Find an Existing Record search page.

   The Find an Existing Record search page appears. This is the first in a series of pages that you will use to define the parts of your query within Query Manager. Access each of the pages using the tabs. In this chapter, we discuss the following tabs that are used to create a simple query: Records, Query, Fields, and Properties.

   The View SQL page enables you to view the Structured Query Language (SQL) code for the query. The Run tab enables you to view the results before running your query. We discuss the Expressions, Prompts, Criteria, and Having tabs in "Defining Selection Criteria."

See Also

Chapter 3, "Defining Selection Criteria," page 27

Common Elements in This Chapter

Add Record	Click this link to access the Query page, where you can add fields to the query content or add additional records.
Show Fields	Click this link to display the fields included in the record.
Col (column)	Displays the current column number for each field listed.
Query Name	*New Unsaved Query* appears in this read-only field until you change it on the Properties page. This field appears on all of the Create New Query pages.
Record.Fieldname	Displays the record alias and name for each field listed.
	Indicates key fields.
	Click the Delete button to delete the associated record from the query. A confirmation message appears. Click the Yes button to proceed with the deletion. Click the No button to cancel the deletion.
	Click the Use as Criteria button to open the Criteria page, where you can add criteria for the selected field.
	Click the Folder button to view the fields for the chosen record. Query Manager expands the record so that you can see the fields and make sure that this record has the content that you want. Click the Folder button again to hide the fields for a record. A key is displayed to the left of key fields.

Creating New Queries

To create a new query:

1. Select the records upon which to base the new query.
2. Add fields to the query content.
3. Format the query output.
4. Specify selection criteria.
5. Run the query.
6. Save the query.

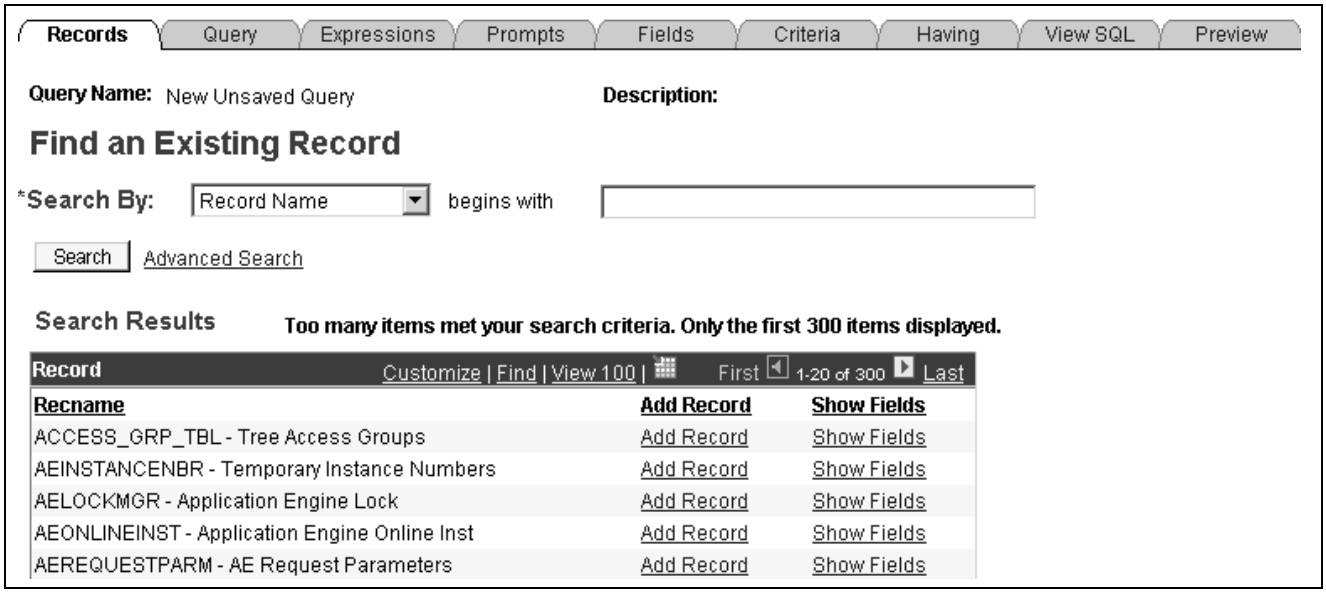
Pages Used to Create a Query

Page Name	Object Name	Navigation	Usage
Records	QRY_RECORDS	Reporting Tools, Query, Query Manager, Create New Query link, Find an Existing Record	Select the records upon which to base the new query.
Query	QRY_QUERY	Reporting Tools, Query, Query Manager, Create New Query, - Records, - Query	Add fields to the query content. You can also add additional records by performing joins. When you first access this page, if you have selected the record for an effective-dated table, PeopleSoft Query displays a dialog box informing you that an effective date criteria has been automatically added for this record. Click the OK button to close the dialog box.
Fields	QRY_FIELDS	Reporting Tools, Query, Query Manager, Create New Query, - Records, - Fields	View how fields are selected for output; view the properties of each field; and change headings, order-by numbers, and aggregate values.
Edit Field Column Order	QRY_FIELDS_COLUMN	Reporting Tools, Query, Query Manager, Create New Query, - Records, - Fields, Edit Field Column Order	Use to change the column order for multiple fields.
Edit Field Sort Order	QRY_FIELDS_ORDER	Reporting Tools, Query, Query Manager, Create New Query, - Records, - Fields, Edit Field Sort Order	Use to change the sort order for multiple fields.
Edit Field Properties	QRY_FIELDS_SEC	Reporting Tools, Query, Query Manager, Create New Query, - Records, - Fields, Edit Field Properties	Use to format the query output (for example, to change column headings or display translate table values in place of codes).
Query Properties	QRY_PROPERTIES	Reporting Tools, Query, Query Manager, Create New Query, Properties Link	View and edit query data, such as the query name and description. Also use to record information about your query so that you can use it again in the future.

Page Name	Object Name	Navigation	Usage
View SQL	QRY_SQL	Reporting Tools, Query, Query Manager, Create New Query, View SQL	View the underlying SQL code that Query Manager generates based on your query definition. You cannot modify SQL on this page.
Run	QUERY_VIEWER	Reporting Tools, Query, Query Manager, Create New Query, Run	View the results of your query prior to saving in order to verify that your query provides you with the results that you need. Continue to adjust and preview your query as necessary.

Selecting Records

Access the Records page.



Records page

Note. In your PeopleSoft database, tables are represented as record definitions. In PeopleSoft Query, we refer to the record definitions as *records*.

To find a record:

1. If you know the entire record name, description, access group name or field name included in the record, navigate to the Records page, then select the appropriate item in the Search by drop-down list box. Enter the name in the field (or click the lookup button if searching by access group name). Then click the Search button to display a list of records that match your search criteria.
   - Perform a partial search by entering part of a record name or description in the Search by field.

     Note. Enter as much of the record name as possible to find the correct record.

- Perform an advanced search by clicking the Advanced Search link. You can perform a progressively narrower search by selecting conditions for the record name, record description, or field name contained in the record, then entering an appropriate search string in the fields that correspond to your selections. For access group name, select a condition then select the access group name from the prompt.
- If you want to view a list of available records, leave the field blank and click the Search button to display a list of up to 300 records.

  By default, only the first 20 records appear on the page. To see more of the list, use the navigation buttons and links located on the header bar. To display 100 of the records, select the View 100 link, and use the scrollbar to go through the rest of the list.

2. If you want to view a record's fields, click Show Fields next to the record whose fields you want to view.

   A page displays the record's fields.
3. Click Return when you have finished looking at the fields.
4. Click Add Record next to the record you would like to add to the query.

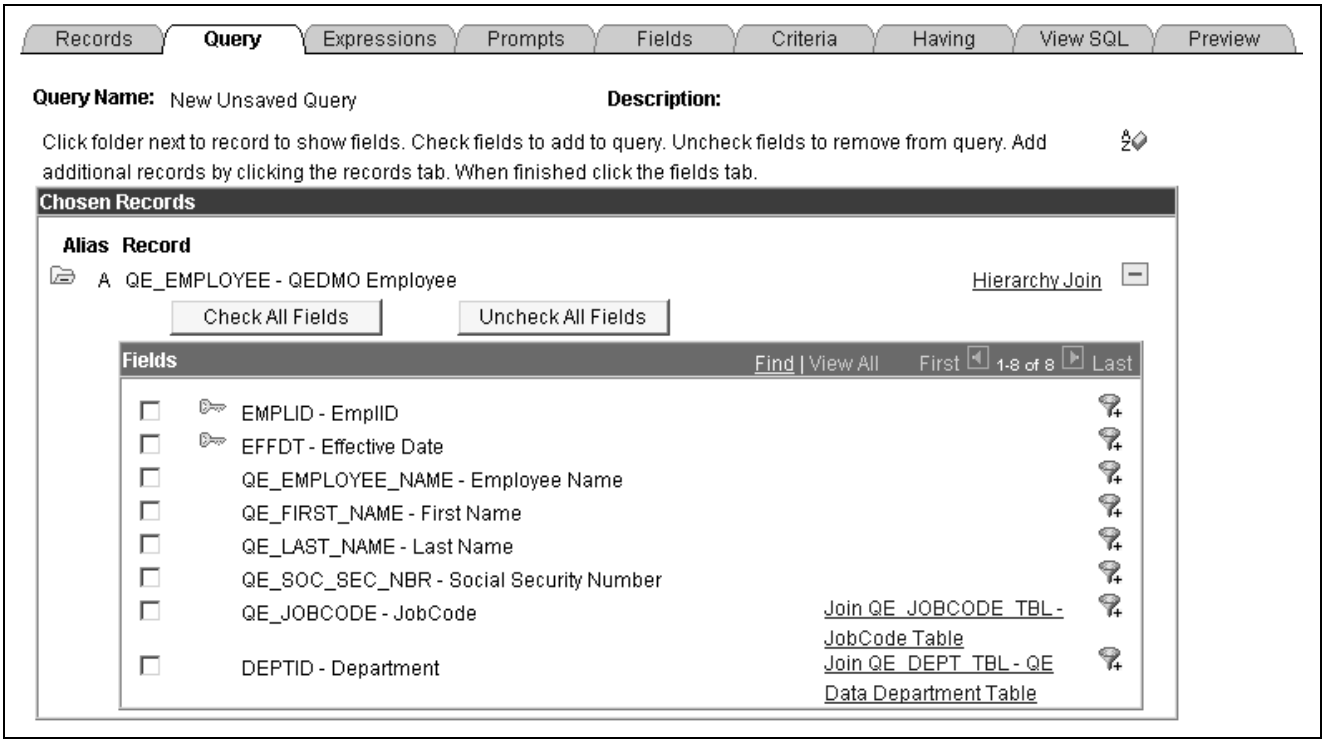
Note. In most cases, you will select only one base record from this page. If you navigate back and select a second base record, you are creating an *any join* for the two records.

See Also

Chapter 5, "Working with Advanced Query Options," Creating Any Record Joins, page 60

Adding Fields to Query Content

Access the Query page.



Query page

	Click the Sort button once to list fields in alphabetical order. Click the button again to return to the original sort.
Alias	The alias name that the system automatically assigns to the chosen records.
Hierarchy Join	Click this link to join a child table to its parent table.
Check All Fields	Click this button to check all fields in the record. Once you select a field, the system automatically adds it to the query and you can view it on the Fields page. This button does not appear when the field names are hidden.
Uncheck All Fields	Click this button to clear all fields in the record.
Field Names	Select the check box located to the left of each field that you want to add to your query content.
Related Record Join	Click this link to join two records that are based on a shared field. For example, in the above example, the QE_DEPT_TBL record is related to the QE_EMPLOYEE record by the DEPTID field.
Expand All Records	Click this button to view all fields in the records This button appears only when there is more than one record listed.
Collapse All Records	Click this button to hide all fields in the records. This button appears only when there is more than one record listed.

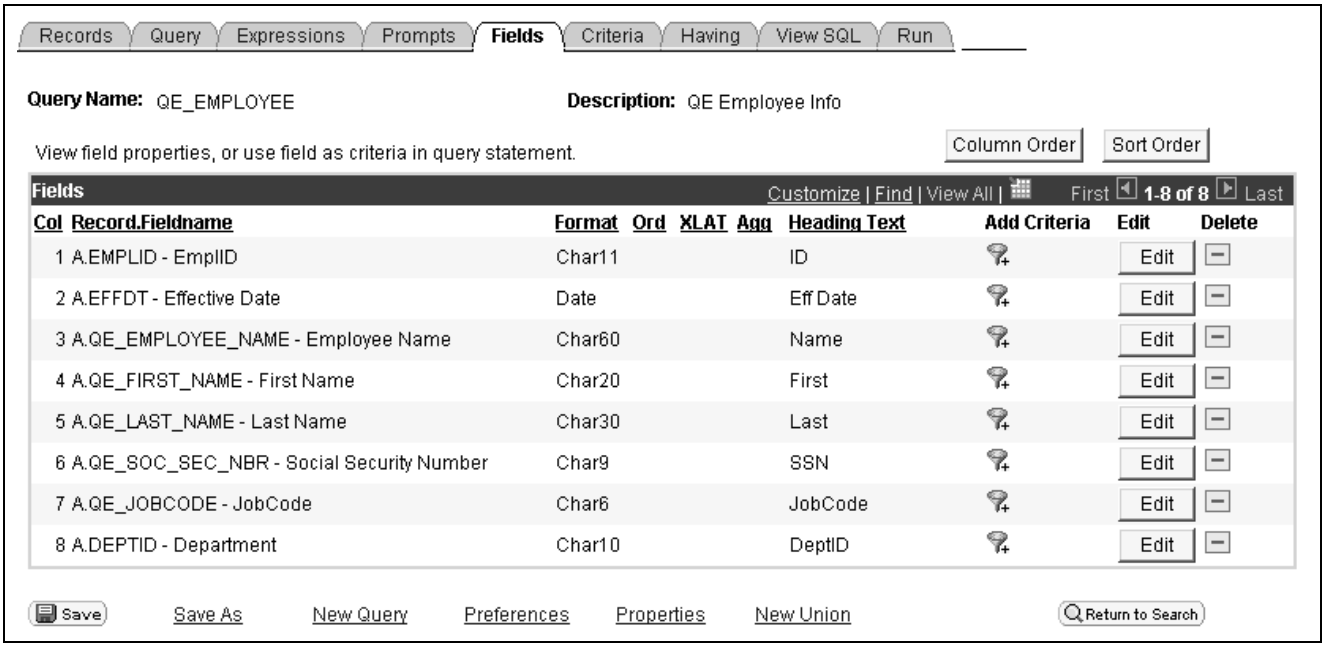
See Also

Chapter 3, “Defining Selection Criteria,” Specifying Effective Date Criteria, page 40

Chapter 5, “Working with Advanced Query Options,” Joining Records, page 58

Viewing Fields Selected for Output

Access the Fields page.



Fields page

Format Field type and length for each field listed.

Ord (order) Shows one or more fields selected to sort your query output.

If the field is the first sort field, a *1* appears, and the system sorts rows that are based on this field first. The second sort field that is selected is numbered *2*, and so on.

A descending sort order can also be specified. The letter *D* appears if sorting fields in descending order is selected.

XLAT (translate) Specifies the translate value that you want to appear in the query results: *N* (none), *S* (short), or *L* (long).

The table you're querying may include fields that use the Translate table. If so, the field itself contains a short code of some kind, for which the Translate table provides a set of corresponding values. For example, if the table includes an EFF_STATUS field, the value is *A* or *I*, which the Translate table translates into *Active* and *Inactive*. If a field has values on the Translate table, a letter appears in the XLAT column for that field.

In your query results, you might want to display the translated value rather than the code (for example, *Active* instead of *A*). To instruct PeopleSoft Query to make this substitution, specify *L* as the translate value.

Translate tables are effective-dated, so you must select which effective date to use for it. For most tables, PeopleSoft Query defaults to the current date, meaning that it uses the currently active list of Translate table values. However, if the table you're querying is also effective-dated, PeopleSoft Query uses the value in the EFFDT field for a row. That is, for each row the query returns, PeopleSoft Query uses the Translate table values that were active as of that row's effective date.

If neither of these effective date options are what you want, you have two more options:

- If the table you're querying includes another date field, you can use the value in that field as the effective date for Translate table values. Click the Edit button and then select the Field option, and then select the field name from the drop-down list box.
- Use an expression to set the effective date for the Translate table. For example, enter a fixed effective date or prompt the user for a fixed effective date.

Agg (aggregate) Aggregate function for each field listed.

Heading Text The heading assigned to appear at the top of the column for the query output for each field listed.

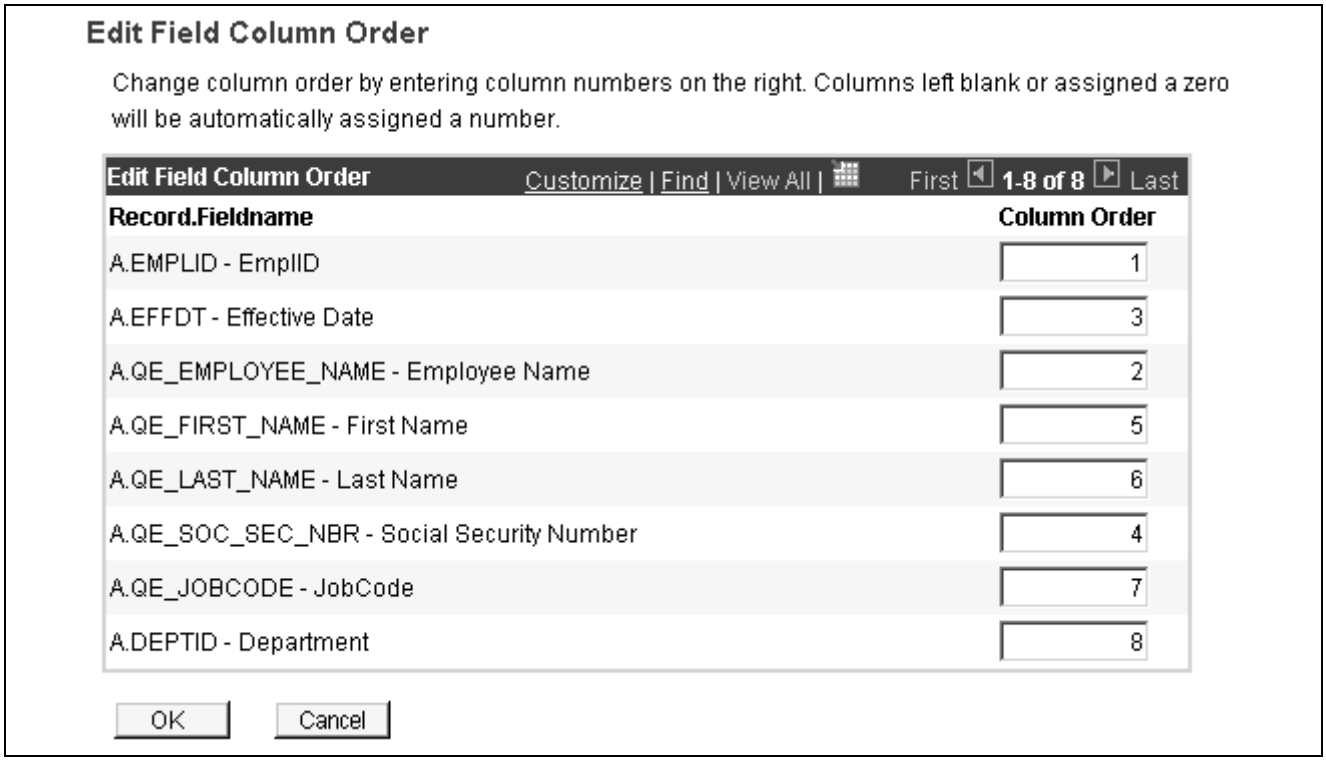
Edit Click this button to format the query output (for example, to change column headings, display translate table values in place of codes, or specify a sort order).

Column Order Click this button to display the Edit Field Column Order page, which enables you to change the column order for multiple fields.

Sort Order Click this button to display the Edit Field Sort Order page, which enables you to change the sort order for multiple fields.

Changing the Column Order for Multiple Fields

Access the Edit Field Column Order page by clicking the Column Order button on the Fields page.

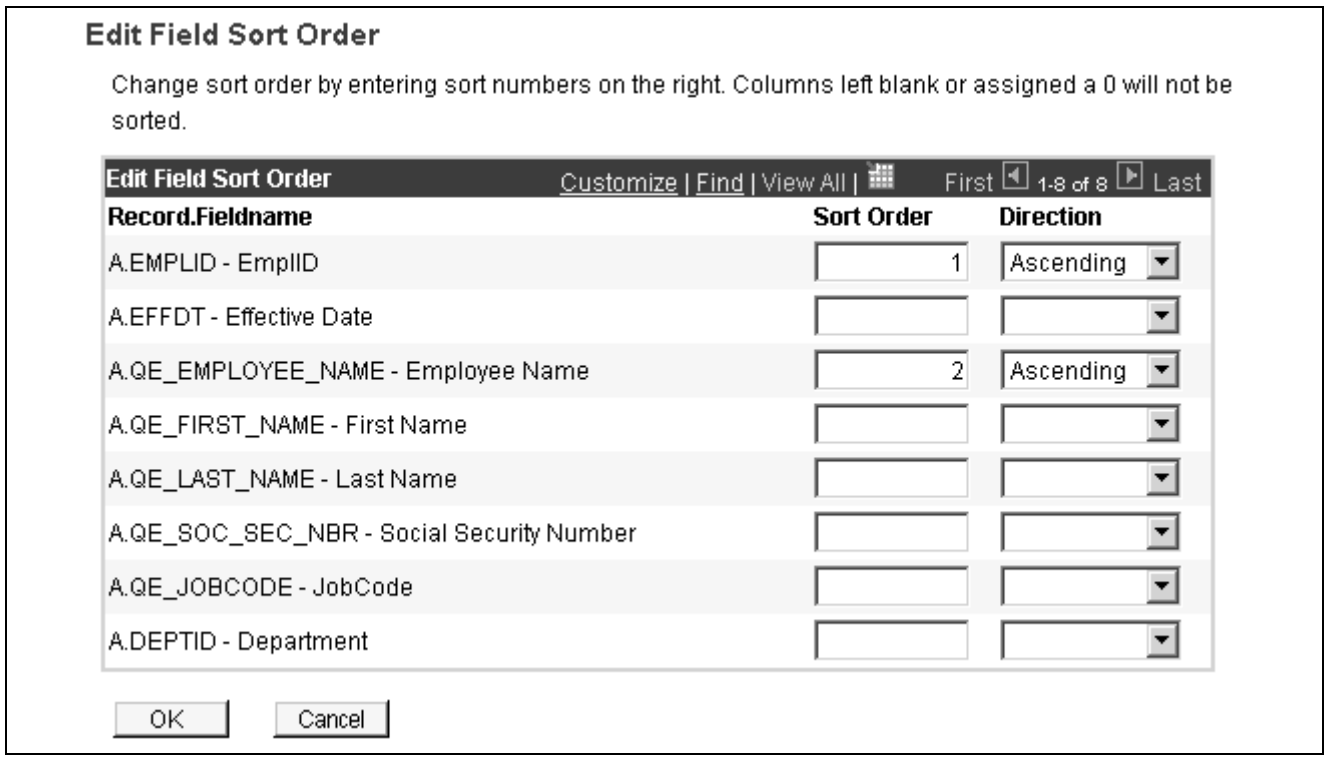


Edit Field Column Order page

Column Order Enter the desired column order. Columns left blank or assigned a zero are automatically assigned a number.

Changing the Sort Order for Multiple Fields

Access the Edit Field Sort Order page by clicking the Sort Order button on the Fields page.



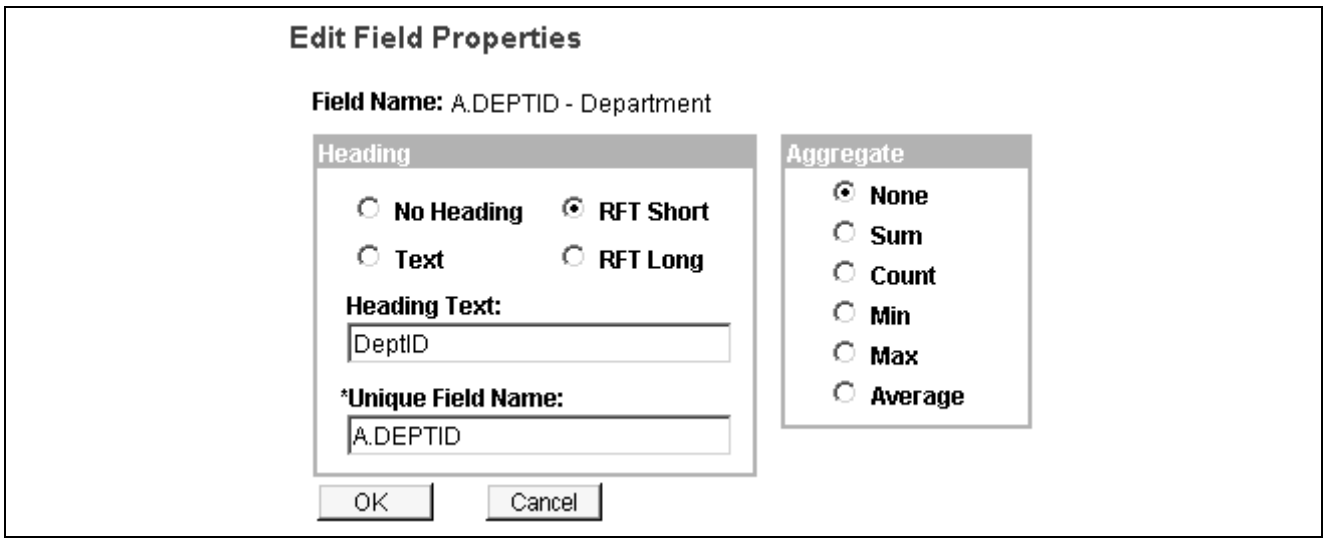
Edit Field Sort Order page

Sort Order Enter the desired sort order. Enter zero to remove a sort order. If the field is the first sort field, enter *1*, and the system sorts rows based on this field first. To be the second sort field, enter *2*, and so on.

Direction Select *Ascending* to sort fields in ascending order. Select *Descending* to sort fields in descending order.

Editing Field Properties

Access the Edit Field Properties page by clicking the Edit button on the Fields page.



Edit Field Properties page

Field Name The name of the field for which you are editing properties.

Column Number By default, the fields appear in the same order as they are listed in the record on the Query page. To change the order for the selected field, enter the new column number. When you close the Field Properties dialog box, the columns reorder.

Heading Choose a column heading from the following:

No Heading: The column does not have a heading.

Text: The column heading is the text that you have entered in the text box.

RFT Short: The column heading is the short name from the record definition.

RFT Long: The column heading is the long name from the record definition.

Unique Field Name Used for translations. There is no need to change the default value, which is a single-letter alias for the record followed with the record field name (for example A.NAME or B.EMPLID).

Descending Select this check box to sort data output in descending order. Leave it blank to sort in ascending order.

Aggregate If you are using aggregate values, select the aggregate function value for this field.

An aggregate function is a special type of operator that returns a single value based on multiple rows of data. When your query includes one or more aggregate functions, PeopleSoft Query collects related rows and displays a single row that summarizes their contents.

None Will not use aggregate functions.

Sum Adds the values from 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.

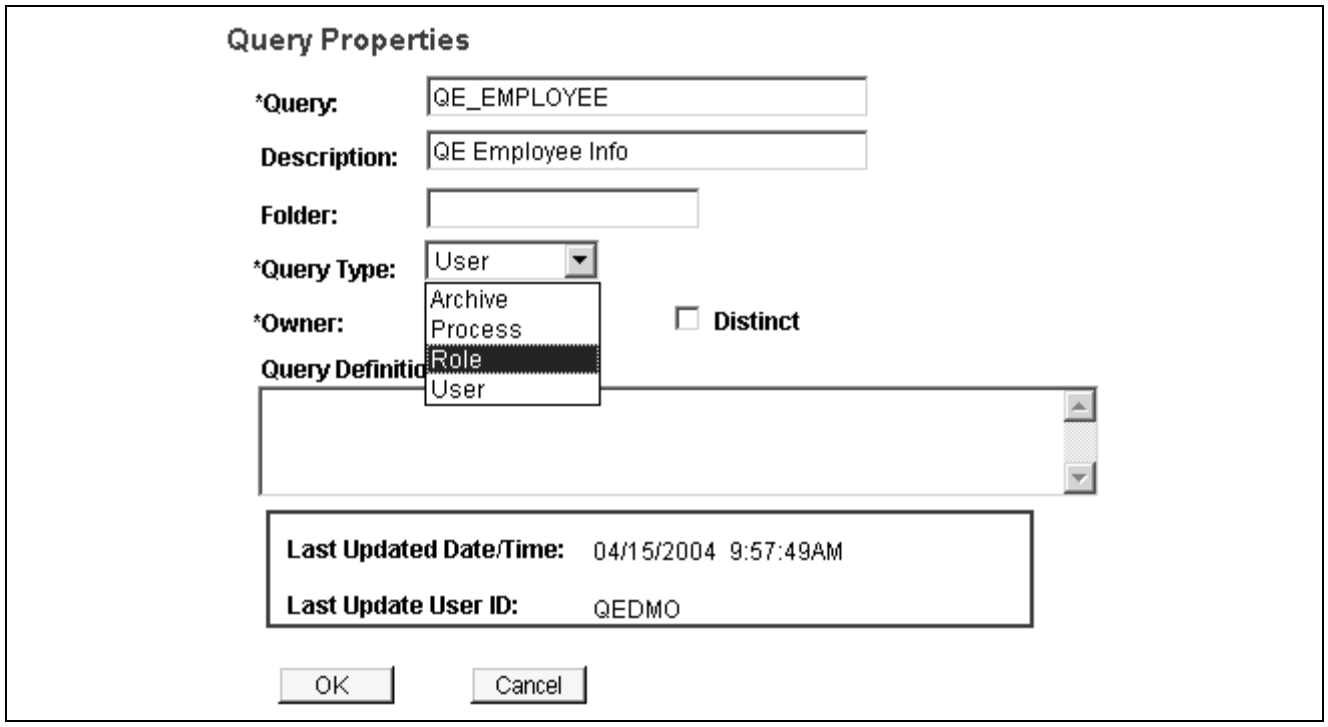
Average Adds the values from each row and divides the result by the number of rows.

See Also

Chapter 5, “Working with Advanced Query Options,” Working with Aggregate Functions, page 55

Viewing and Editing Query Properties

Access the Query Properties page.



Query Properties page

Query Enter a name for the new query. This field appears on all the Create New Query pages.

Description Enter a description for the new query. This field appears on all the Create New Query pages.

Folder Enter the name of the folder in which you would like the query to reside.

To create a new folder, enter the name of the new folder.

Query Type Select *Archive, Process, Role* or *User.* Workflow queries are either *Process* or *Role.*

Owner Select from the following:

Private: Only the user ID that created the query can open, run, modify, or delete the query.

*Public:*Any user with access to the records used by the query can run, modify, or delete the query (if they have access to public queries).

Distinct Select this check box to eliminate duplicate rows in a query result.

Some queries return the same row more than once because it satisfies the query in more than one case. For example, if you query the JOB record to return all JOBCODES, you will receive multiple rows that look identical because some employees have the same JOBCODE. If you select the Distinct check box, you will receive each JOBCODE only once.

This option is not visible for union selections because unions are automatically distinct.

Query Definition Free text area that you can use to further describe your query.

Save Click to save the page.

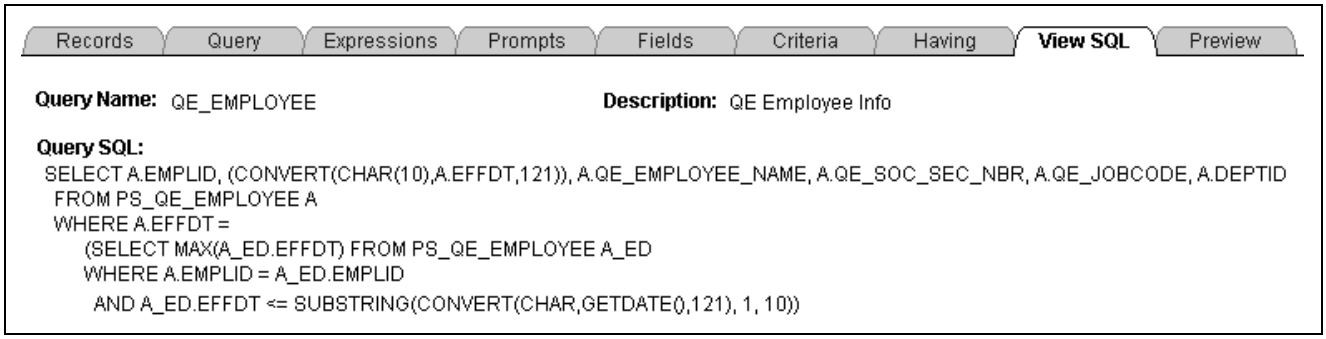
See Also

Appendix A, "Creating Workflow Queries," page 65

Appendix B, "PeopleSoft Query Security," page 67

Viewing Underlying SQL Code

Access the View SQL page.

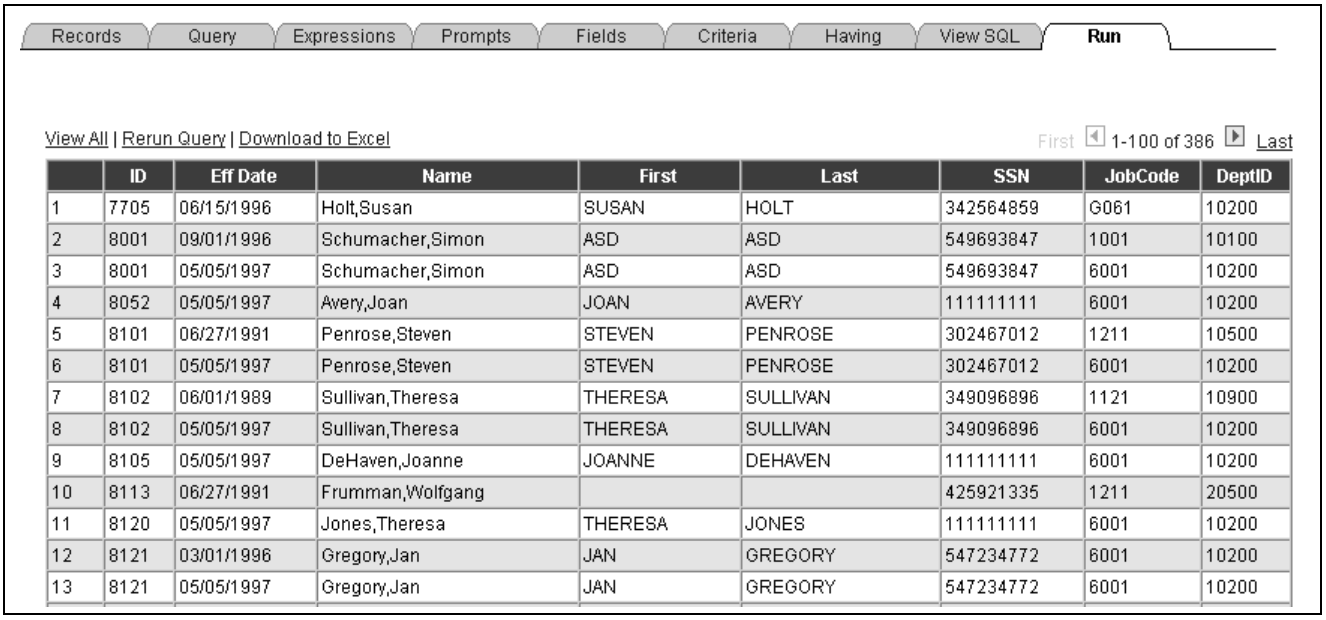


View SQL page

Query SQL Displays the underlying SQL code that Query Manager generates based on your query definition. To copy the SQL statement, highlight the text of the statement and copy it using your browser's copy command. Paste it into another application, if desired.

Previewing Query Results Prior to Saving

Access the Run page.



	ID	Eff Date	Name	First	Last	SSN	JobCode	DeptID
1	7705	06/15/1996	Holt,Susan	SUSAN	HOLT	342564859	G061	10200
2	8001	09/01/1996	Schumacher,Simon	ASD	ASD	549693847	1001	10100
3	8001	05/05/1997	Schumacher,Simon	ASD	ASD	549693847	6001	10200
4	8052	05/05/1997	Avery,Joan	JOAN	AVERY	111111111	6001	10200
5	8101	06/27/1991	Penrose,Steven	STEVEN	PENROSE	302467012	1211	10500
6	8101	05/05/1997	Penrose,Steven	STEVEN	PENROSE	302467012	6001	10200
7	8102	06/01/1989	Sullivan,Theresa	THERESA	SULLIVAN	349096896	1121	10900
8	8102	05/05/1997	Sullivan,Theresa	THERESA	SULLIVAN	349096896	6001	10200
9	8105	05/05/1997	DeHaven,Joanne	JOANNE	DEHAVEN	111111111	6001	10200
10	8113	06/27/1991	Frumman,Wolfgang			425921335	1211	20500
11	8120	05/05/1997	Jones,Theresa	THERESA	JONES	111111111	6001	10200
12	8121	03/01/1996	Gregory,Jan	JAN	GREGORY	547234772	6001	10200
13	8121	05/05/1997	Gregory,Jan	JAN	GREGORY	547234772	6001	10200

Run page

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

Rerun Query Click this link to rerun your query preview. If you have made changes to your query since the last preview, you must rerun the query to see the affect of your changes.

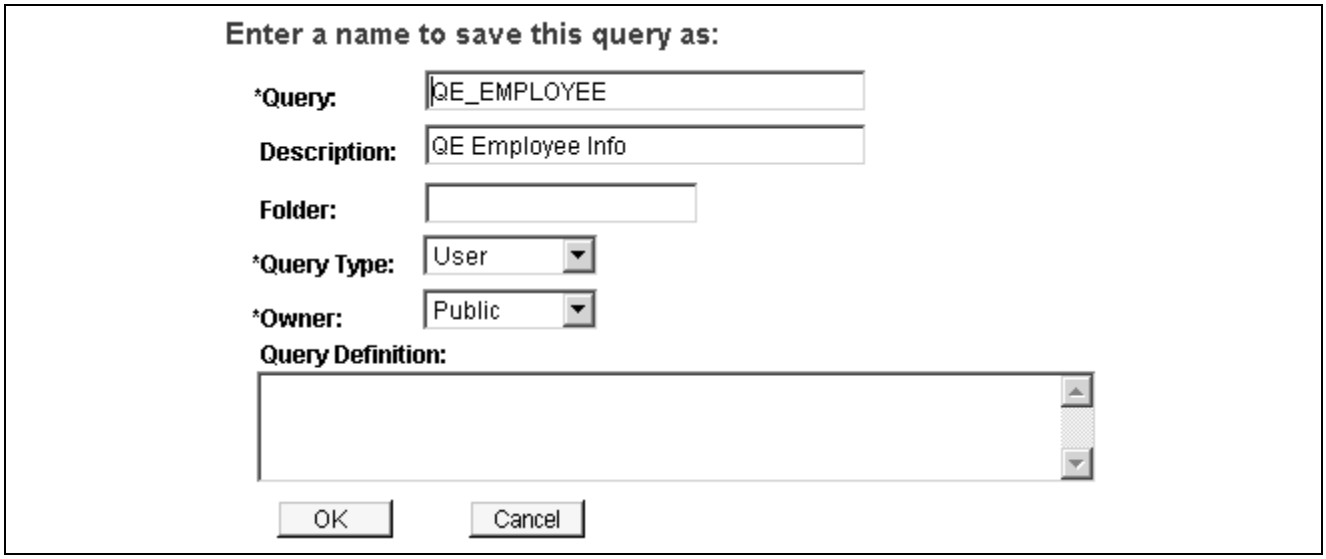
Note. If you do not want to rerun the query every time you want to preview it, *deactivate* the Enable Auto Preview feature. When this feature is active, your query automatically runs each time you select the Run tab. To *activate* Enable Auto Preview, click the Preferences link then select Enable Auto Preview.

Download to Excel Click this link to download your query to Excel.

Note. To grant access to download your query to Excel, the permission lists of the users must include the WEBLIB_QUERY web library with full access.

Saving Queries

You can save a query at any time after you have selected one record and at least one field for your query. Save queries from any Query Manager page (except for the Records page) by clicking either the Save button or the Save As link. You must enter some basic information about the query before the system allows you to save it for the first time.



Saving a query

To save a query:

1. After you make your changes in Query Manager, select Save.
2. In the Query field, enter a short name for the query; in the Description field, enter information that will help you to later identify the query.
3. In the Description field, enter an appropriate description for the query.
4. In the Folder field, enter the name of the folder into which you would like to save the query.

   To create a new folder, enter the name of the new folder.
5. Select a query type.

   Standard queries are designated as *User* queries. If you have access to workflow queries, your list of types will also expand to include role, process and archive.
6. In the Owner field, select whether your query is *Public* or *Private.*
   - *Private* means that only the user ID that created the query can open, run, modify, or delete the query.
   - *Public* means that any user with access to the records used by the query can run, modify, or delete the query.
7. Enter the query definition.

Note. Using Save As creates another instance of the query that you can modify and save under a different name. When you select Save As, the Properties page appears, enabling you to change the name, description, and owner of the new query.

Running Queries

You can run a predefined query from your browser and view it online. When you click the Run button on the Query Manager search page, PeopleSoft Query displays the results in a new browser window. This Run option is useful if you want to run multiple queries or run the same query multiple times with different run time prompt values and compare the results of the queries.

To run a query:

1. Select Reporting Tools, Query, Query Manager.

Query Manager Search page appears.

2. Search for a query using the basic or advanced search function. Both search types allow you to use the following *search by* criteria: access group name, description, folder name, owner, query name, type, uses field name, and uses record name. The basic search allows you to search using the *begins with* condition. The advanced search allows you to perform a progressively narrower search by using one or more *search by* criteria and selecting from a broad choice of conditions. The following provides instructions on using *search by* criteria:

   - If you know the entire name of the query that you want to run, select Query Name from the Search by drop-down list box. Then enter the query name in the Search by field.

     If you do not know the name of the query and want to search through a list of queries, leave the Search by field blank and click the Search button to display a list of up to 300 queries.

     Perform a partial search by entering part of the search string in the Search by field.

   - To search using any other *search by* criteria, select the appropriate item from the Search By drop-down list box, then enter the search string in the field.

3. To perform an advanced search, click the Advanced Search link on the Query Manager Search page. On the Advanced Search page, select the appropriate *search by* criteria and conditions, then enter a search string in each of the corresponding fields.

4. Click the Search button to display a list of queries that match your search criteria. The Search Results page appears. The results list all the queries that match the search criteria. The following information appears:

   - Query name.
   - Query description.
   - Owner (public or private).
   - Folder.

5. Scroll to the name of the query that you want to run.

   By default, only the first 30 queries appear on the page. To see more of the list, click the navigation buttons and links located on the header bar.

   To display 100 of the queries, select View 100 and use the scrollbar to view the rest of the list.

6. To run a query, click the Edit link on the row of the query. You may also select from the following links on the row of the query:

   - Run to HTML: Click to generate an HTML version of the query.
   - Run to Excel: Click to download the query to an Excel spreadsheet.
   - Schedule: Click to schedule a time for the query to run.

See Chapter 4, “Modifying, Scheduling, and Organizing Queries,” Scheduling Queries, page 48.

See Also

Enterprise PeopleTools 8.45 PeopleBook: Security Administration, “Understanding PeopleSoft Security,” Security Basics

Adding Queries to the Internet Explorer Favorites List

To add a query to the *Favorites* list on the Internet Explorer menu:

1. Right-click the Run To HTML link on the Query Manager or Query Viewer search page.

   The Add Favorite dialog box appears.

2. Change the name to the name of your query.
3. Click OK.

   Internet Explorer adds the query to your Internet Explorer Favorites list.

Downloading Queries

You can download your query to an Excel spreadsheet or CSV text file.

Once you have downloaded the query to Excel, the first row in the spreadsheet will display the total number of rows of your query that are included in the spreadsheet.

Note. Excel spreadsheets can contain a maximum number of 65,536 rows. If the spreadsheet cannot include all of the rows in your query then the first row will display – in a red font – the total number of rows of your query that are included in the spreadsheet.

If you download your query from the Run page, the query will have a different default filename than if you download your query after clicking the Run to HTML or Run to Excel links. These default filenames are different because queries that are run using the Run page are run using the application server. Queries run using the Run to HTML and Run to Excel links are run using a query service.

To download your query results, select one of the following:

- Run to Excel: Click this link on the Query Manager or Query Viewer Search Results page.
- Download to Excel: Click this link on the Query Manager or Query Viewer Run page.
- *Excel SpreadSheet*: This option is available after you have clicked Run to HTML on the Query Manager or Query Viewer search results page. However you can also click Download to Excel and Run to Excel without downloading the query to HTML.

  Excel 2000 or later is preferred. If you're using Excel 97, select the CSV text file link when you need to download large resultsets.

  You can configure your environment to open the Excel file in a separate window or save it as a file on your local hard drive by modifying the File Type Option settings for Excel Worksheets.

Note. Downloaded data such as numbers and dates are formatted in the Excel spreadsheet according to the regional settings on the user's machine.

If you use the Windows NT or Windows 2000 or Macintosh operating systems, you can set your downloaded queries to open in browser windows instead of in the Microsoft Excel application. To set this in Windows, select the XLS file type in your folder options and select the Browse in same window check box. When this check box is cleared, downloaded queries open in the Microsoft Excel application.

The query name and run time parameters have now been added when downloading to Excel from Query using Query Viewer or Query Manager. However, run time parameters are not downloaded when using the RUN option.

- *CSV Text File*: This option is available after you have clicked Run to HTML.

Note. The output has no formatting and does not support UTF-8 encoded data.

Note. If you are using Office 97, the File download dialog box appears. You can open the file in your browser or save it to disk.

To modify the File Type Option settings for Excel Worksheets when using Windows 2000:

1. Open Windows Explorer.
2. Select Tools, Folder Options, File Types.

   If you're using Windows NT, select View, Options, File Types.
3. Select *XLS* (Excel Worksheet)
4. Click the Advanced button, and select or clear the Browse in same window check box .

   If you're using Windows NT, click the Edit button, and select or clear the Confirm Open After Download check box.

Applying a Formula to a Newly Inserted Column

When working in Excel on a query that you have downloaded, adhere to the following guidelines in order to insert a new column to the spreadsheet, then add a formula to that column:

When you insert a new column in Microsoft Excel, the new column's cells assume the default format from one of the adjacent columns—typically the left column. For example, inserting a column between columns B and C causes the new column to take the format of column B. If column B is formatted as Text, you will not be able to apply a formula to the newly inserted column.

Note. If the columns adjacent to the newly inserted column have a format of General, you should be able to apply a formula without performing the following procedure.

To apply a formula to a newly inserted column:

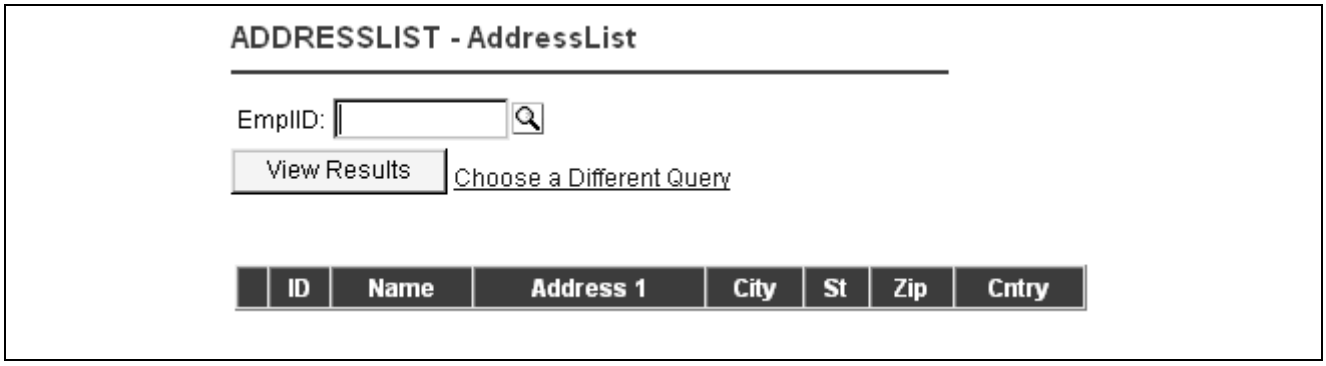
1. Highlight the newly inserted column.
2. Change the column's format from text to general.
3. Insert the formula into the column.

Performing Lookups

Some queries are designed to prompt you for information when you select to run them. By doing this, the results of your query are narrowed to only the data matching the information that you entered, instead of returning all the data from the records. To help you enter the correct information, you can perform a search using the Lookup button that appears on the page.

For example, the ADDRESSLIST query prompts you for a specific employee ID. You might know an employee's last name, but not have the employee ID handy. Using the Lookup button, you use the information that you *do* have to find the required information.

In this example, we perform a basic lookup using ADDRESSLIST.



ADDRESSLIST page

To perform a lookup:

1. Click the Run link from the Query Manager Search page for the ADDRESSLIST query name from the query list.
2. If you know the employee ID for the address that you are looking up, enter it in the *EmplID* (employee ID) field; if you need to search for the employee ID, click the Lookup button.
3. On the Lookup page, click the drop-down arrow to find more search values.

   In this example, you can select *EmplID*, *Name*, or *Last Name*. To find all values for this field, leave the search field blank and click the Lookup button. You can also display all of the search fields at once by clicking the Advanced Lookup link.
4. Select the value to search by, and then click the Lookup button.

   In this example, we know the employee's last name, but not his employee ID.

   Your lookup information appears on the page.
5. Click the link in the result field.

   The Query page appears with the required value already complete.
6. Click the View Results button.

   The query results appear on the page.

Printing Query Results

To print query results, you must first run the query and have the results appear in your browser. Click the Print button from your browser, or select File, Print from you browser menu. The query prints on your default printer.

If you choose to download the query to Excel, you can print the query using Excel's print function.

Using Query Viewer

Query Viewer is a read-only version of Query Manager. It provides security administrators with an easy way to limit some users to read-only access for all queries. Query Administration can easily provide read-only access to users who should only view or print queries.

Query Viewer enables you to:

- Search for a query using the basic or advanced search functions.

  Both search types allow you to select the following *search by* criteria: access group name, description, folder name, owner, query name, query type, uses field name, and uses record name. The basic search enables you to search using only the *begins with* condition. The advanced search enables you to perform a progressively narrower search by using one or more *search by* criteria and selecting from a choice of conditions for each *search by* criterion.

- Run a query (which displays results in a new browser window).

  To run a query, click the Edit button on the row of the query on the Search Results page.

- Download the results to an Excel spreadsheet, HTML, or a CSV Text file.

  You can download the results to an Excel spreadsheet or HTML by clicking the Run to Excelor Run to HTML links associated with the query on the Search Results page. To download the results to a CSV Text file, click the Run to HTML link associated with the query on the Search Results page, then click CSV Text File on the HTML results of the query.

- Print a query:

  - To print query results, you must first run the query and display the results in your browser.

    Click the Print button from your browser, or select File, Print from you browser menu. The query prints on your default printer.

  - If you choose to download the query to Excel or another tool, you can print the query using the print functions of those applications.

    Note. To grant access to download the query to Excel, the permission lists of the users must include the WEBLIB_QUERY web library with full access.

- Schedule a query:

  - From the Search results page, click the Schedule link associated with the query.

  - Query Viewer interacts with PeopleSoft Process Scheduler to give users the ability to schedule queries.

    You can submit requests to schedule a query, check the status of your request using Process Monitor, and view your output using Report Manager.

See Also

Chapter 2, “Creating and Running Simple Queries,” Previewing Query Results Prior to Saving, page 18

Chapter 2, “Creating and Running Simple Queries,” Running Queries, page 20

Chapter 4, “Modifying, Scheduling, and Organizing Queries,” Scheduling Queries, page 48

CHAPTER 3

Defining Selection Criteria

To selectively retrieve just the data you want, you define *selection criteria*. Selection criteria refines your query by specifying conditions that the retrieved data must meet. For example, you can specify that the system retrieve only those phone numbers with a certain area code instead of all phone numbers.

This chapter discusses how to:

- Define expressions.
- Define prompts.
- Choose selection criteria.
- Define criteria.
- Define HAVING criteria.

Defining Expressions

Expressions are calculations that PeopleSoft Query performs as part of a query. Use them when you must calculate a value that PeopleSoft Query does not provide by default (for example, to add the values from two fields together or to multiply a field value by a constant).

An expression can be treated just as if it were a field in the query: select it for output, change its column heading, or choose it as an “order by” column.

In Query Manager, you can use expressions in two ways:

- As comparison values in selection criteria.
- As columns in the query output.

To add or edit expressions for queries:

1. Select Reporting Tools, Query, Query Manager, Create New Query, Expressions to open the Expressions page.
2. The query name appears in the Query Namefield.

   The default for this field is *New Unsaved Query* until you change it on the Properties page.
3. Click Add Expression to open the Edit Expression Properties page, where you can select expression types.
4. Select an Expression Type from the drop-down list.

   If you select *Character,* enter the maximum length of the expression result in the Length field.

   If you select *Number* or *Signed Number,* enter the total number of digits in the Length field and the number of digits after the decimal point in the Decimal field.

5. If you are entering an aggregate value, such as SUM, AVG, or COUNT, select the Aggregate Expression check box.
6. In the Text Box field, enter the expression.

   Query Manager inserts the expression into the SQL for you. You can include Oracle hints in PeopleSoft Query expressions using the following rules:

   - Expression containing a hint must begin with /*+
   - Expression can contain only one hint.

     For example, only one set of /*+ */ is allowed.
   - Expression must contain complete hint.

     For example, it can't have only /*+ or */. Both must be in the same expression.
7. Click Add Prompt to add prompt properties for this expression; click Add Field to add another field to this expression.

Using MetaSQL in Expressions

MetaSQL enables you to enter an expression that can be used across any supported database. For example, to concatenate strings use the MetaSQL %CONCAT, and Enterprise PeopleTools will convert it to the appropriate database string concatenation function. To create a substring use %SUBSTRING.

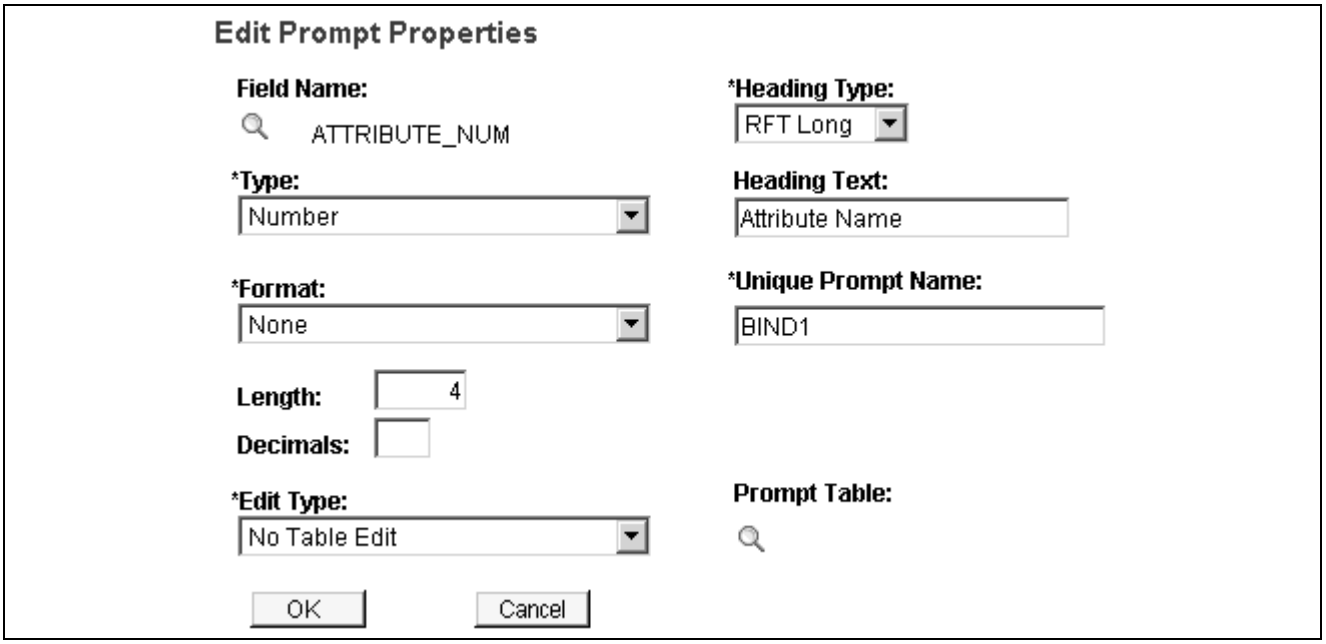
Note. You will need to make sure the expression type and length are set correctly for the data that is going to be returned. Only the MetaSQL functions that are valid for *dynamic views* will work with PeopleSoft Query.

See Also

Enterprise PeopleTools PeopleBook: PeopleCode Reference, "Meta-SQL."

Defining Prompts

Access the Edit Prompt Properties page.



Edit Prompt Properties page

To define prompts:

1. Select Reporting Tools, Query, Query Manager, Create New Query, Prompts to add or edit one or more prompts for your query.
2. Click the Add Prompt button to add a new prompt, or click the appropriate Edit button to edit an existing prompt.

   The Edit Prompt Properties page appears.
3. Click the Lookup button next to the *Field* field to select a prompt field.

After you select a prompt field, the name of the field appears. PeopleSoft Query looks to the record definition for information about this field and completes the rest of the dialog box based on its properties.

Heading Text Displays the label for the text box where you enter the comparison value. To change the text, select Text from the Heading Type list box, then enter the new label in the Heading Text text box.

Unique Prompt Name A default value generated by Query Manager for globalization. This value can be set only by a base language user to uniquely identify a query prompt parameter.

Edit Type Defines the type of field edit for the specified field. *No Table Edit* is the default. In general, we recommend that you use the same edit type that is used in the field record definition so that this edit type is consistent throughout Enterprise PeopleTools.

Prompt Table If the edit type is *Prompt Table*, the value in the Field list box specifies the prompt table to use. If the edit type is *Translate Table*, the value in the drop-down list box determines the values used. PeopleSoft Query assumes that the specified field has translate table values associated with it, and that the field is identified as a translate table field in its record definition.

See *Enterprise PeopleTools 8.45 PeopleBook: Security Administration*, "Implementing Query Security".

Note. When using a prompt table on a field from a record definition with multiple keys, you must prompt for all higher-level keys before lower-level keys. PeopleSoft Query needs values for the higher-level keys to generate the correct prompt list. Because of this complication, we recommend that you do not use multikey prompt tables.

Adding a prompt enables you to further refine a query when you run it. For example, suppose you wanted to change a query so that you could prompt the user to enter a value for the duration of a vacation. Prior to adding the prompt, the query always retrieved rows for employees who have taken vacation based on a defined constant value on which to make a comparison. Adding a prompt to the query enables the user to enter any duration, then the query can return employees based on the value provided when running the query.

When you run a query with a prompt, a dialog box appears for you to specify the required value. Enter the value into the text box. The query uses the value that you enter as the comparison value for the criterion that included the prompt.

If the field for which you are prompting has an associated prompt table (even if it is the Translate table), the Edit Tabledrop-down list box shows its name.

See Also

Chapter 3, "Defining Selection Criteria," Entering Comparison Values, page 34

Chapter 2, "Creating and Running Simple Queries," Adding Fields to Query Content, page 11

Choosing Selection Criteria

Because your PeopleSoft database stores data in tables, you can identify every individual piece of data by saying what *column* (field) and *row* (record) its in. When you create a query, pick the data that you want by specifying which columns and rows you want the system to retrieve.

If you run the query after selecting the fields, the system retrieves *all* the data in those columns; that is, it retrieves the data from every row in the table or tables. You select which rows of data you want by adding selection criteria to the query.

The selection criteria serves as a test that the system applies to each row of data in the tables that you are querying. If the row passes the test, the system retrieves it; if the row does not pass, the system does not retrieve it. For example, suppose you needed the names of all PeopleStore customers who are not PeopleSoft employees. You'd start by creating a query that retrieves the Name and Company fields from the Customer table. You can then add a selection criterion that tells PeopleSoft Query to scan for rows where the company name is not *PeopleSoft.*

In most cases, a selection criterion compares the value in one of a row's fields to a reference value. In the example from the previous paragraph, you would compare the value in the Company field to the constant value *PeopleSoft.* In other situations, you might compare the value to the value in another record field or to a value that the user enters when running the query.

Defining Criteria

This section discusses how to:

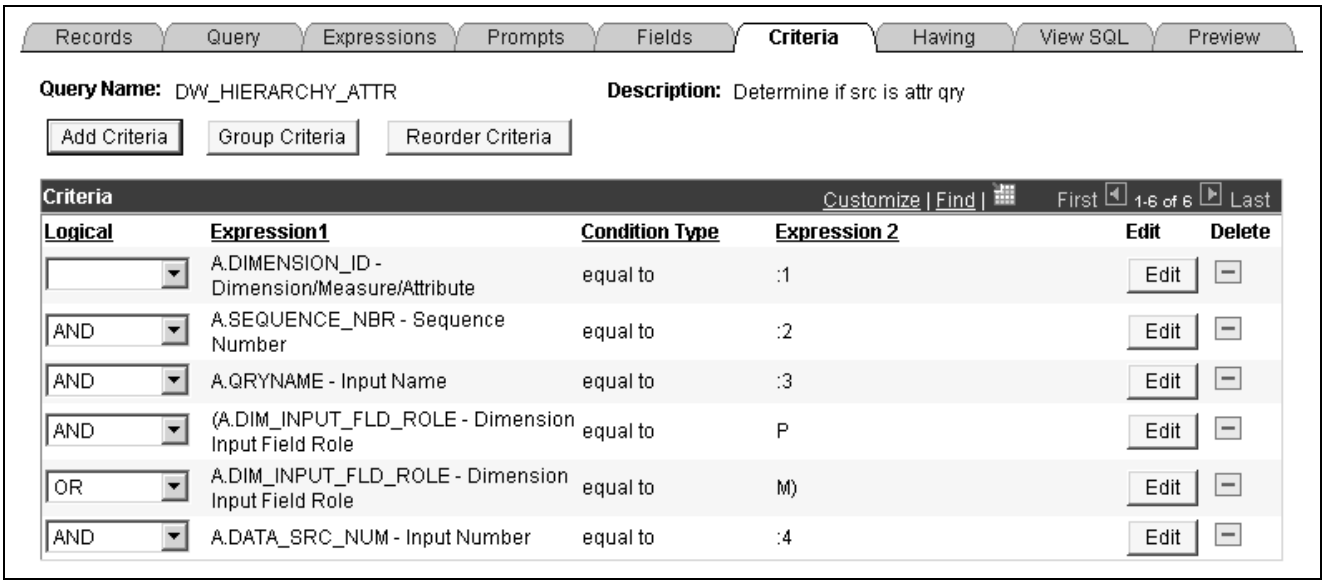
- Enter selection criteria.
- Select condition types.
- Enter comparison values.
- Specify effective date criteria.
- Relate multiple criteria.

Pages Used to Enter Selection Criteria

Page Name	Object Name	Navigation	Usage
Criteria	QRY_CRITERIA	Reporting Tools, Query, Query Manager, Create New Query, Criteria	Enter selection criteria for the query.
Query	QRY_QUERY	Reporting Tools, Query, Query Manager, Create New Query, Query	Click the Add Criteria icon associated with the required field.
Fields	QRY_FIELDS	Reporting Tools, Query, Query Manager, Create New Query, Fields	Click the Add Criteria icon associated with the required field.

Entering Selection Criteria

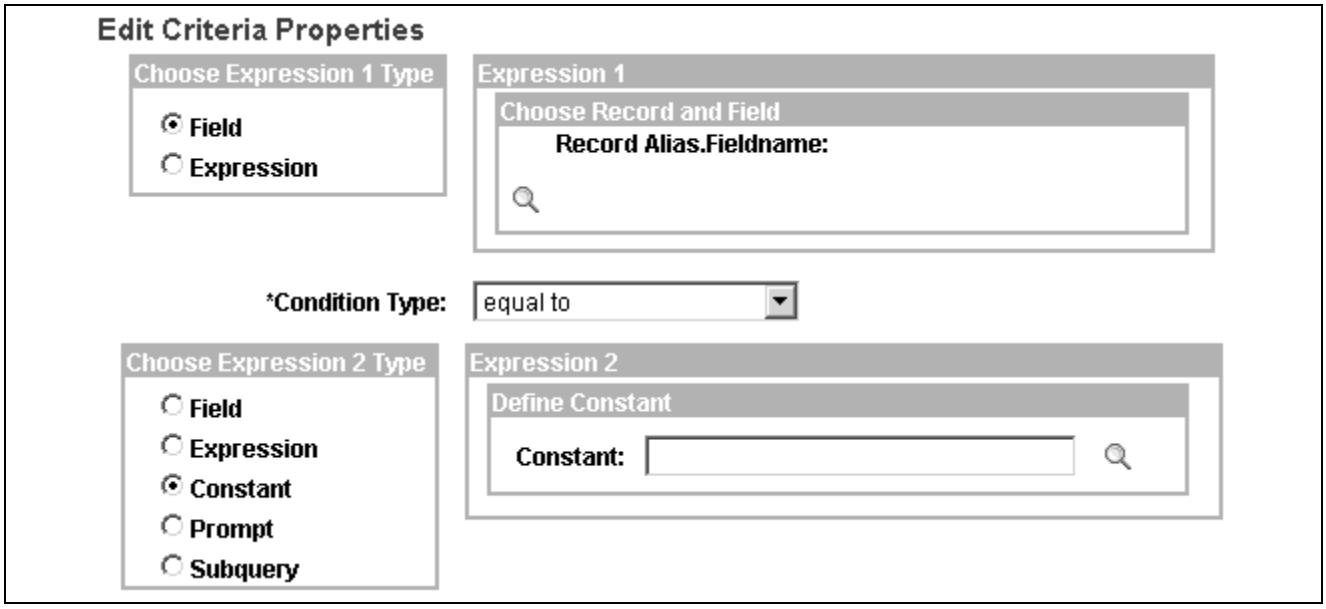
Access the Criteria page.



Criteria page

Any rows after the first row must include either an AND or OR logical value in the Logical column to specify whether you want the rows to meet this criterion in addition to other criteria you have defined or as an alternative criterion. The first criterion you define does not have a value in this column. The default for subsequent criteria is AND.

To reorder the criteria for your query, click Reorder Criteria, enter the new positions for the criteria on the Edit Criteria Ordering page, and click OK.



Edit Criteria Properties page

Field Select if you want to base the selection criterion on another field's value. Usually a field in another record component. To compare the values from fields in two records, you must join the record components.

When you select this option, you must go on to select a condition type.

See Chapter 3, "Defining Selection Criteria," Selecting Condition Types, page 33.

Click the drop-down button in the Condition Type column and select the appropriate comparison operator from the pop-up menu.

Expression Select if you want PeopleSoft Query to evaluate an expression that you enter before comparing the result to the value in the selected field.

When you select this option, you must go on to select an expression type. If you are entering an aggregate value, select the Aggregate Expression check box. You can also enter parameters for length and decimal positions.

Also enter the expression in the text box. Query Manager inserts this expression into the Structured Query Language (SQL).

Criteria Based on a Field

To create criteria based on a field:

1. Click the Add Criteria icon that is associated with the required field, on the Fields or Query page.

   Query Manager opens the Edit Criteria Properties page with the selected field entered as Expression 1.
2. Specify the criteria for that field, and then click OK to return to the Fields or Query page.

   You can also use a field from a record as criteria even if you have not chosen that field for query output.

Criteria Not Based on a Field

To create criteria that is not based on a field:

1. Click the Add Criteria button on the Criteria page.

The Edit Criteria Properties page appears, enabling you to edit Expression 1 and Expression 2.

2. In the Choose Expression 1 Type group box, select Field or Expression.
3. Edit the second (right-hand) Expression column to enter comparison values.
4. Save your query.

See Also

Chapter 3, "Defining Selection Criteria," Entering Comparison Values, page 34

Selecting Condition Types

The condition type determines how Query Manager compares the values of the first (left-hand) expression to the second (right-hand) expression.

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.

Note. It is always better to use the *not* version of an operator rather than the NOT operator on the entire criterion. When you use NOT, PeopleSoft Query cannot use SQL indexes to speed up the data search. When you use the *not* version of an operator, PeopleSoft Query can translate it into a SQL expression that enables it to use the indexes.

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 operator is different from the others, in that it does not 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	The value in the selected record field matches one of the comparison values in a list.

Condition Types	When It Returns a Row
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 operator is a tree or branch of a tree that you want PeopleSoft Query to search. **Note.** PeopleSoft Query should not use trees which contain a combination of dynamic details and range details. The results returned from trees with this combination of details may be inaccurate.
is null	The selected record field does not have a value in it. You do not specify a comparison value for this operator. 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. For example, C% matches any string starting with C, including C alone. _ matches any single character. For example, _ones matches any five-character string ending with *ones*, such as Jones or Cones. PeopleSoft Query also recognizes any wildcard characters that your database software supports. See your database management system documentation for details. 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\%\).

Note. If you have selected the EFFDT field on an effective-dated table, PeopleSoft Query also offers special effective date operators.

See Also

Chapter 3, "Defining Selection Criteria," Specifying Effective Date Criteria, page 40

Entering Comparison Values

This section provides an overview of comparison values and discusses how to:

- Select a constant value.

- Build a list of values.
- Add prompts to the expression list.
- Add a comparison value to the list.

The procedure for entering comparison values differs depending on what kind of value you're entering. If you're comparing one field to another, pick the second record field; if you're comparing the rows to a constant value, enter the constant.

The following table describes all the available value types, the dialog boxes that appear based on each comparison type, and the fields you must complete in those dialog boxes.

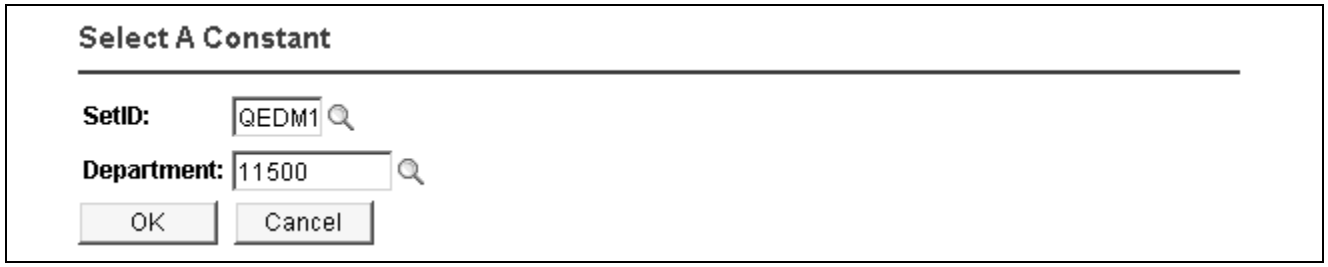
Value Type	Action
Field	The value in the selected field is compared to the value in another field, usually a field in another record component. When you have selected Field as the comparison value, the Choose Record and Field dialog box appears. The Record Alias field lists all the records that are part of the current query. Select the record and the field. The selected field name appears in the second Expression column of that field's row.
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. When you have selected Expression as the comparison value, the Define Expression dialog box appears. In the text box, enter a valid SQL expression. To add a field or user prompt to the expression, click the Add Prompt link or the Add Field link. These links display the same dialog boxes that you see when adding a field or prompt as a comparison value: the Add Prompt displays the Run-time Prompt dialog box; the Add Field link displays the Select Record and Field dialog box. The only difference is that PeopleSoft Query adds the field or prompt to your expression rather than using it directly as the comparison value.
Constant	The value in the selected field is compared to a single fixed value. When you select Constant as the comparison value the Define Constant dialog box appears. In the text box, enter the value you want to compare the first expression to. To add a value by selecting it from a list, click the lookup button to display the Select a Constant page. See *Selecting a Constant Value.*

Value Type	Action
Subquery	The value in the selected field is compared to the data returned by a subquery. When you select Subquery as the comparison value, the Define Subquery dialog box appears. Click the Define/Edit Subquery link to move to the Records tab to start a new query. See Chapter 5, "Working with Advanced Query Options," Working with Subqueries, page 57.
Prompt	The value in the selected field is compared to a value that you enter when running the query. When you select Prompt as the comparison value, the Define Prompt dialog box appears. Click the New Prompt link to move to the Edit Prompt Properties page. See Chapter 3, "Defining Selection Criteria," Defining Prompts, page 28.
In List	The value in the selected field is compared to a list of values that you enter. This value type is available only when the selected operator is *in list* or *not in list*. When you select In List as your comparison value, the Edit List dialog box appears. Use the Lookup button to display the Edit List page and search for the desired values. See *Building a List of Values*.
Current Date	The value in the selected field is compared to the current date on the database server.
Tree Option	The value in the selected field is compared to a selected set of tree nodes. This value type is available only when the selected operator is *in tree* or *not in tree*. When you select Tree Option as the comparison value, the Select Tree Node List dialog box appears. Use this dialog box to create a list of values for PeopleSoft Query to compare to the value from the first expression.
Effective Seq (effective sequence)	Used on some effective-dated records, the effective sequence is a sequencing number provided to further refine the effective date.

Note. Not all value types are available for all operators. For example, when you select the *exists* operator, *Subquery* is the only available value type. After you select an operator, PeopleSoft Query displays only the value types that are available for that operator.

Selecting a Constant Value

When you select *Constant* as your comparison value, the Define Constant dialog box appears. In the text box enter the value to which you want to compare the first expression. To add a value by selecting it from a list, click the Lookup button to display the Select a Constant page.



Select a Constant page

To select a constant:

1. Click the Lookup button to select a constant.

   The Look Up page appears.

2. Select the desired value from the result list by clicking its associated link.

   The Select a Constant page appears again with the selected value in the field.

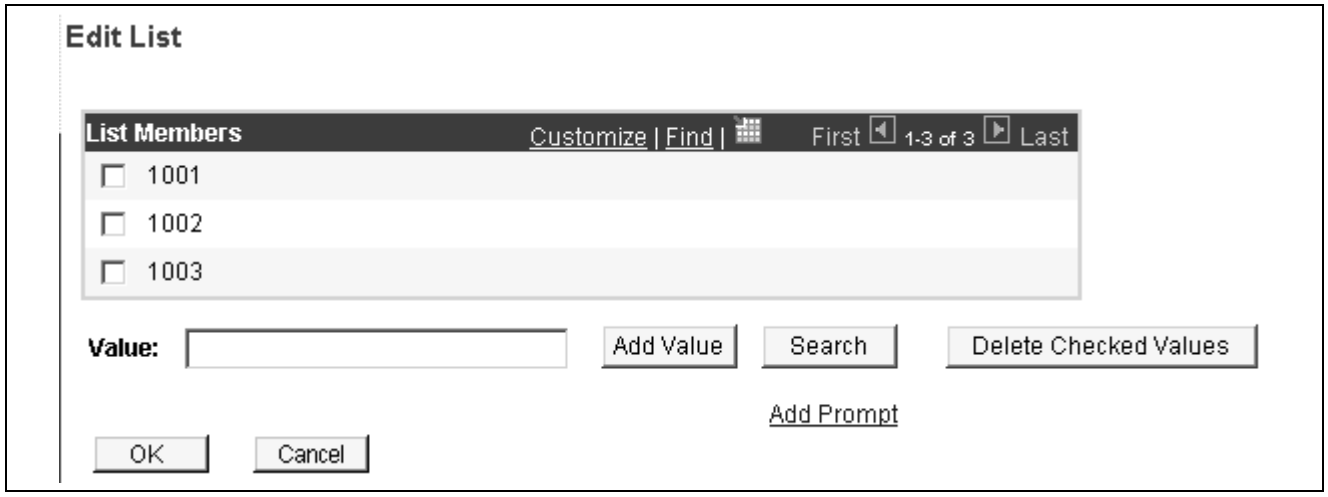
3. If more than one field exists on the Select a Constant page, you must repeat steps 1 and 2 for each field in order to further narrow your search for the constant.

4. Click OK.

   The Edit Criteria Properties page appears. The selected value is displayed in the Define Constant dialog box.

Building a List of Values

When you select *In List* as your comparison value, the Edit List dialog box appears. Use this dialog box to build a list of values for PeopleSoft Query to compare to the value from the first expression. To add a comparison value to the list, click the Lookup button on the Edit List dialog box. This displays the Edit List page, which dynamically reflects which record is used.



Edit List page

List Members Lists the values that have been selected using the Add Value button.

Note. The grid, containing the selected value, appears when a value is selected.

To delete a value, select the check box to the left of the appropriate List Members value and click the Delete Checked Values button.

Value For each value that you want to add, manually enter a value in the Value text box and click the Add Value button. The value will display in the List Members grid.

To select from a list of values, click the Search button to display the Select a Constant page. Click the Lookup button to display the Look Up page. Enter part of a value in the text box. The system automatically adds a wildcard to the end of the entry, which enables you to do a partial search. For example, if you enter a value of *10*, the system will return all values, (up to a total of 300), that begin with 10, such *10*, *100*, and *10069*. Click the Look Up button to display the list of values that corresponds to the search criteria.

Select the desired value from the list by clicking its associated link. The Select a Constant page appears again. Click OK. The selected value will display in the List Members grid.

Add Prompt Select to add one or more prompts to the list so that users can enter the comparison values when they run the query.

OK Click to accept the values listed on the List Members grid.

The system jumps back to the Edit Criteria Properties page. The values selected will be listed in the Edit List dialog box.

Cancel Click to return to the Edit Criteria Properties page without saving selections.

Adding Prompts to an Expression List

You can add one or more prompts to the expression list so that users can enter comparison values when they run a query.

To add prompts to an expression list:

1. Click the Add Prompt link to open the Select a Prompt page.
2. Click the required prompt.

   The prompt appears on the Edit List page.

   If you selected the *in list* operator, you may want to add more than one prompt so that your users can enter more than one value to search for.
3. To add another prompt, click the Add Prompt link again and select a different prompt.

   Because you already have a prompt in place, a different dialog box appears, showing the prompt you have already added.
4. To add the next prompt, click the New button and complete the Run-time Prompt dialog box.

   The settings for this second prompt are the same as those used with the first prompt. If you want a different label for this prompt, enter that label in the Heading Text text box.

   When you click OK, the second prompt appears in the Available Prompts list.
5. Highlight the second prompt, and click the Select button to add it to the list of comparison values.

The prompt then appears in the Edit List dialog box.

6. Repeat this process for each prompt you want to add.

   When you're done, click OK to close the Edit List dialog box.

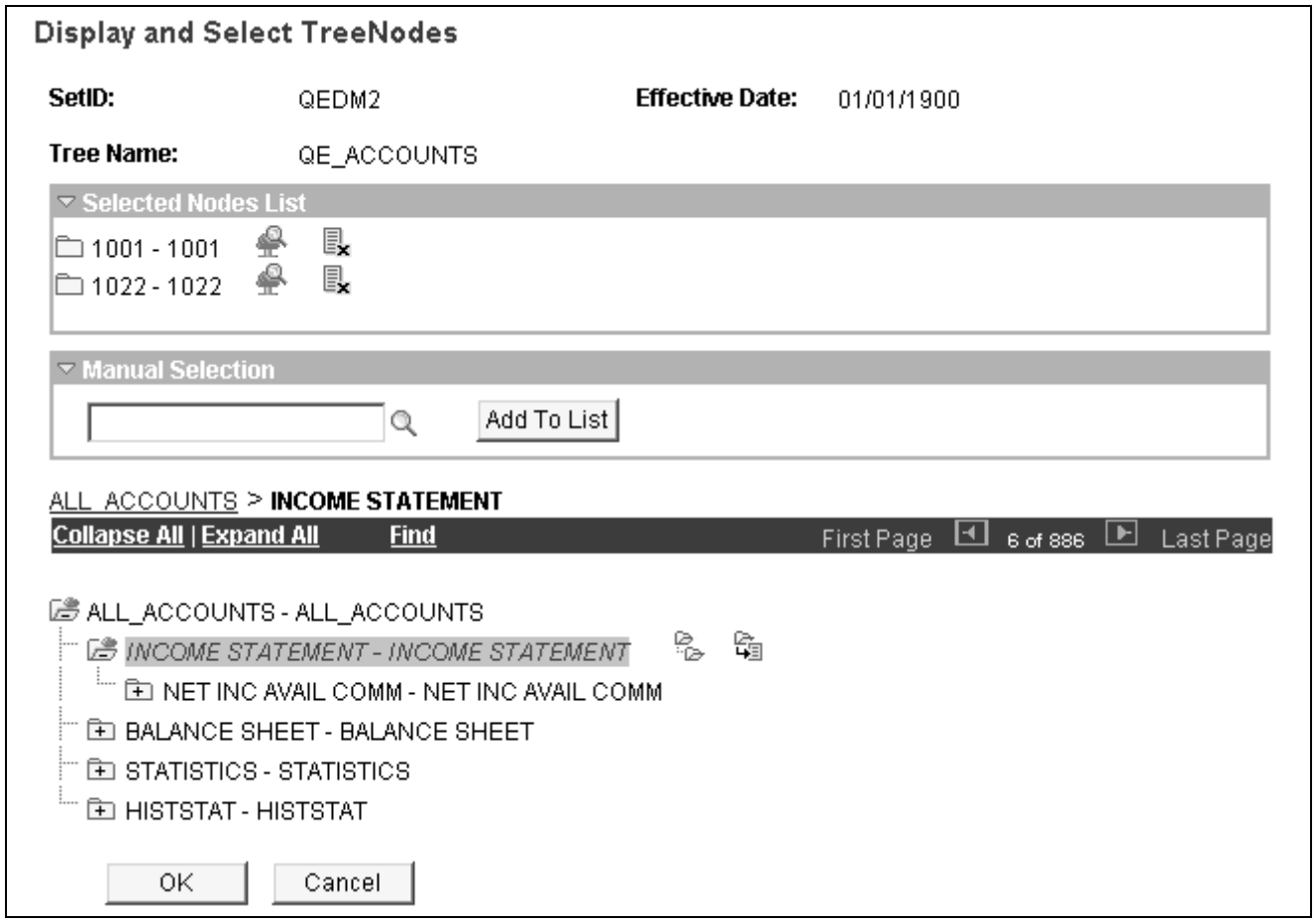
Adding Comparison Values to an Expression List

When you select Tree Option as the comparison value, the Select Tree Node List dialog box appears. Use this dialog box to create a list of values for PeopleSoft Query to compare to the value from the first expression. Click the New Node List link to display the Select Tree page.

If the Selected Nodes List has been previously populated, you can either:

- Change the tree by clicking the New Nodes List link.
- Open the previously selected tree, bypassing the Tree Selection page, by clicking the Edit Node List link.

Click the name of the desired tree to display the Display and Select TreeNodes page, which you can use to select which element of the tree PeopleSoft Query will check. If no nodes have been previously selected, the Selected Nodes List grid is collapsed. If you do not know the name of the tree, you can perform a search for the tree.



Selecting tree nodes on the Display and Select TreeNodes page

To select tree nodes:

1. Highlight the desired tree node, and click the Add Node icon.
2. If you know the name of the desired node, enter the name of the desired node in the Manual Selection list box.

Alternatively, click the Lookup button to select the desired node from a list of available nodes. When you find the node you're looking for, click the Add to List button to add it to the list. The nodes you enter or select from the list appear in the Selected Nodes list box.

3. Remove nodes from the list by clicking the corresponding icon.
4. Display the selected tree branch by clicking the corresponding icon.
5. Click OK.

   The selected tree setID, tree name, effective date, and selected nodes appear in the Select Tree dialog box.

Specifying Effective Date Criteria

Effective-dated tables have record definitions that include the Effective Date (EFFDT) field. This field, used throughout the PeopleSoft applications, provides a historical perspective, allowing you to see how the data has changed over time. Whenever users add a row of data to the table, they specify the date on which that data becomes effective; whenever users change a row of data, they specify a new effective date, and the system retains the previous version of the row as history.

When you're using a PeopleSoft application for day-to-day processing, you usually want the system to give you the *currently effective* rows of data—the row where the effective date is less than or equal to today's date. You do not want to see the history rows, which are no longer accurate, nor do you want to see future-dated rows, which are not yet in effect.

When you're querying an effective-dated table, though, you may well want to see some rows that are not currently in effect. You might want to see all the rows, regardless of their effective dates. Or you might want to see the rows that were effective as of some date in the past.

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.

   This criteria is used to specify which row of data PeopleSoft Query retrieves for each item in the table. The default is the currently effective row. Defaults are as follows:

   Expression 1 Record Alias.EFFDT

   Condition Type EffDt <=

   Expression 2 Current Date

   Effective Sequence Last

2. If you choose one of the comparison options, choose to compare each row's effective date against today's date or a date other than today.

   - 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 some future date.

   - Select *Expression* to display the Define Expression dialog box so that you can enter a SQL expression that evaluates to a date.

     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 Define Expression dialog 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 some other record. For example, if you're reviewing the list of products on a customer order, you will 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.
- Select *No Effective Date* to return all rows, regardless of their effective dates.

Note. All options (except *No Effective Date*) return a single row for each item on the table. If you want a subset of the rows (say, all future-dated rows or all history rows), select *No Effective Date*, then enter a selection criterion on the Effective Date field. Use the standard comparison operators rather than the Effective Date comparison operators.

Keep in mind that the effective date operators work differently than the standard comparison operators: they always return a single effective-dated row. For example, Eff Date <= returns the one row whose EFFDT value is most recent, whereas not greater than would return the currently active row *and* all history rows.

See Also

Enterprise PeopleTools 8.45 PeopleBook: Using PeopleSoft Applications, "Working With Pages," Using Effective Dates

Relating Multiple Criteria

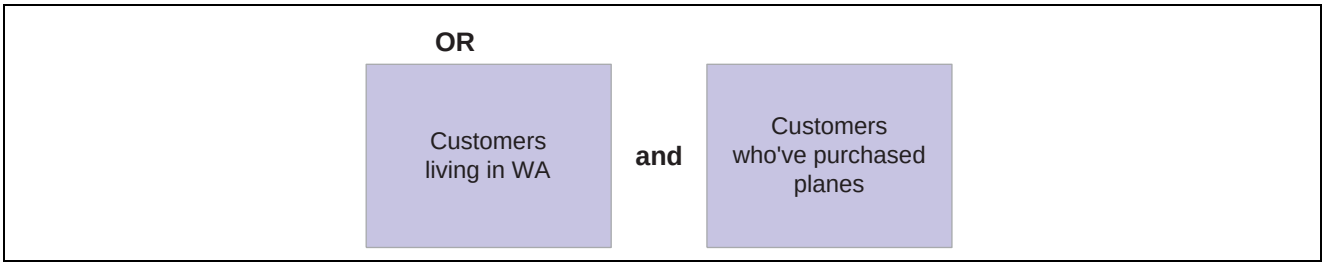
Using PeopleSoft Query, you can relate multiple criteria in specific ways that you define using the AND, AND NOT, OR, and OR NOT operators. You can also group criteria using parentheses.

This section discusses how to:

- Use AND and OR logical operators.
- Group criteria with parentheses.

Using AND and OR Logical Operators

When you specify two or more selection criteria for a query, you must tell PeopleSoft Query how to coordinate the different criteria. For example, suppose you're querying the list of your customers and you have defined two criteria: one that selects customers from the state of Washington and another that selects customers who have purchased airplanes. You may want PeopleSoft Query to return only those rows that meet *both* conditions (customers in Washington who have purchased airplanes), or you may want the rows that meet *either one* of the conditions (*all* Washington customers plus *all* customers who have purchased airplanes).



Rows returned by AND and OR

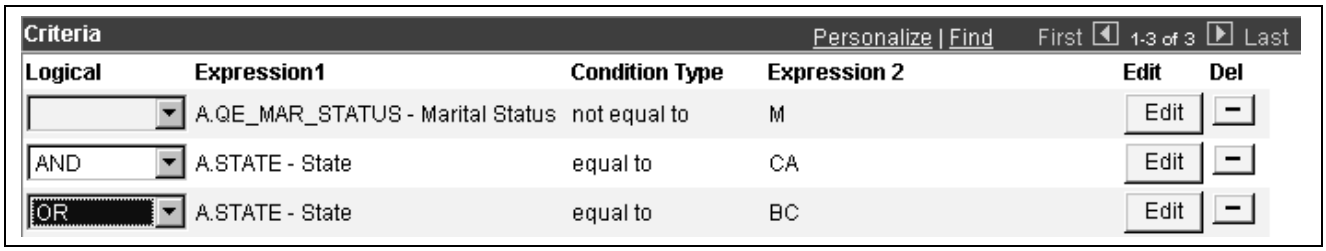
When your query includes multiple criteria, link them using either AND, AND NOT, OR, or OR NOT. When you link two criteria with AND, a row must meet the first *and* second criterion in order for PeopleSoft Query to return it. When you link two criteria with OR, a row must meet the first *or* second criterion, not necessarily both.

By default, PeopleSoft Query assumes that you want those rows that meet all of the criteria you specify. When you add a new criterion, PeopleSoft Query displays *AND* in the Logical column on the Criteria tab. To link the criterion using one of the other options instead, select the required option from the drop-down list.

Grouping Criteria with Parentheses

When your query includes multiple criteria, PeopleSoft Query checks the criteria according to the rules of logic: it evaluates criteria linked by ANDs before those linked by ORs. When all the criteria are linked by ANDs, this order always returns the correct results. When you mix in one or more ORs, however, this is not always what you want.

For example, suppose you wanted a list of employees who are not married and reside in either California (CA) or British Columbia (BC). Enter the following criteria:

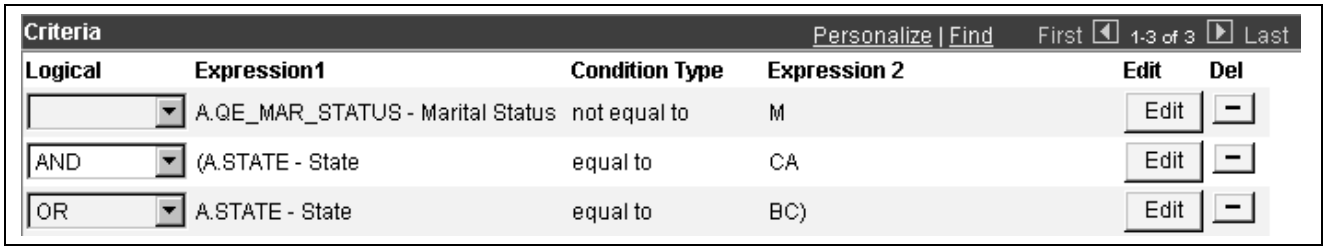


Example of criteria that returns an incorrect result

The set of criteria entered in the previous screen shot returns a list of employees in California (except for those who are married) and *all* employees in British Columbia (including those who are married). This list results because PeopleSoft Query evaluates criteria in the order of appearance. It looks for rows where the employee is not married *and* where the state is California *or* rows where the state is British Columbia.

What you really want PeopleSoft Query to search for are rows where the state is British Columbia *or* California, *and* where the marital status is not married. That is, you want PeopleSoft Query to evaluate the OR before the AND. To accomplish this task, add parentheses to the list of criteria. When a list of criteria includes parentheses, PeopleSoft Query evaluates the criteria inside the parentheses before the criteria outside the parentheses.

On the Criteria tab, the opening parenthesis appears just before the field name and the closing parenthesis appears just after the comparison value. For example, following is the set of criteria that returns the result you want:



Adding parentheses around the last two criteria

To group criteria:

1. Click the Group Criteria button located on the Criteria tab.

   The Edit Criteria Grouping page appears.

2. Use the edit boxes to enter parenthesis for each criteria.

A parenthesis appears at the beginning of the Expression1 column for the first row that you selected and at the end of the Expression2 column for the last row that you selected. In the previous example, notice that the *AND* operator *precedes* the parentheses, while the *OR* operator is located *within* the parentheses.

You can add as many parentheses as needed.

Defining HAVING Criteria

SQL does not support the use of aggregate functions in WHERE clauses. Therefore, once you have applied an aggregate function to a field, you cannot use that field in your selection criteria, which corresponds to a SQL WHERE clause. When you want to select rows based on the results of an aggregate function, Query Manager enables you to create *HAVING criteria.* For example, you want a list of the departments whose minimum salary is greater than $100,000.

In SQL, a HAVING clause is like a WHERE clause for rows of data that have been aggregated into a single row of output. The system evaluates WHERE clauses by looking at the individual table rows *before* they're grouped by the aggregate function, then it evaluates HAVING clauses *after* applying the function. So if you want to check the value returned by the function, you must define a HAVING criterion.

When you click the Add Criteria icon from the Fields or Query tabs for an aggregate field, new criteria is added to the Having Criteria tab instead of the Criteria tab. Add selection criteria using the Having Criteria tab in the same way you add selection criteria using the Criteria tab.

Keep in mind that PeopleSoft Query compares the result of applying the aggregate function to the comparison value.

CHAPTER 4

Modifying, Scheduling, and Organizing Queries

This chapter discusses how to:

- Modify queries.
- Schedule queries.
- Organize queries

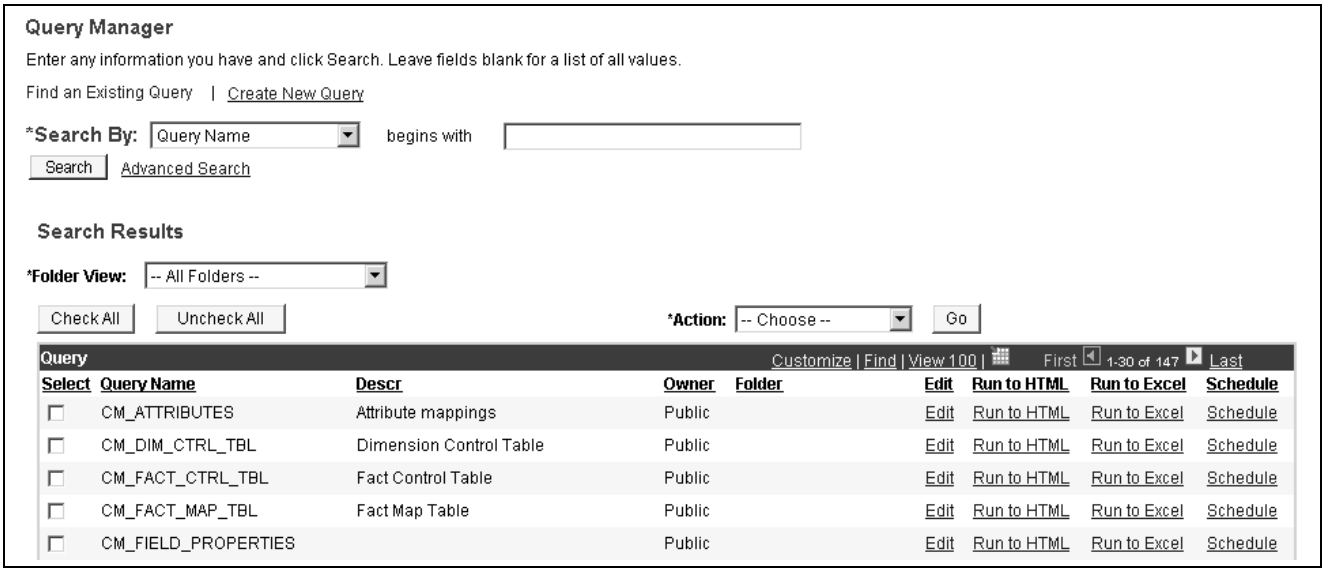
Modifying Queries

This section discusses how to:

- Open existing queries.
- Rename queries.
- Delete queries.
- Update existing queries.
- Automatically repair existing queries.

Opening Existing Queries

Use Query Manager to open and view queries.



Query Manager Search Results page

To open an existing query from your browser:

1. Select Reporting Tools, Query, Query Manager.

   The Query Manager search page appears.

2. Search for a query using the basic or advanced search functions. Both search types enable you to select from the following *search by* criteria: access group name, description, folder name, owner, query name, query type, and uses record name. The basic search enables you to search by using the *begins with* condition. The advanced search enables you to perform a progressively narrower search by using one or more *search by* criteria and selecting from a choice of conditions for each *search by* criterion. The following provides instructions on using *search by* criteria:

   - To perform a basic search by name, enter the name of the query in the Search by field and click the Search button.

     If you do not know the name of the query and want to search through a list of queries, leave the Search for field blank and click the Search button to display a list of up to 300 queries.

     Perform a partial search by entering part of a query name or description in the Search by field. Use the drop-down list to search queries by either name or description. Then click the Search button to display a list of queries that match your search criteria.

     The Search Results page appears and lists all the queries that match the search criteria. The following information appears: query name, query description, ownership (public or private)

   - If you know the name of the query that you want, enter it in the Search by field and click the Search button.

     If you do not know the name of the query and want to search through a list of queries, leave the Search for field blank and click the Search button to display a list of up to 300 queries.

     Perform a partial search by entering part of a query name or description in the Search by field. Use the drop-down list box to search for queries by either name or description. Then click the Search button to display a list of queries that match your search criteria.

     The Search Results page appears. The results list all the queries that match the search criteria. The following information appears: query name, description, owner, folder.

   - To perform an advanced search, click the Advanced Search link. On the advanced search page, select the appropriate *search by* criteria and conditions and enter a search string in each of the corresponding fields. Then click the Search button to display a list of queries that match your search criteria. The Search Results page appears. The results list all the queries that match the search criteria. The following information appears: query name, description, owner, folder.

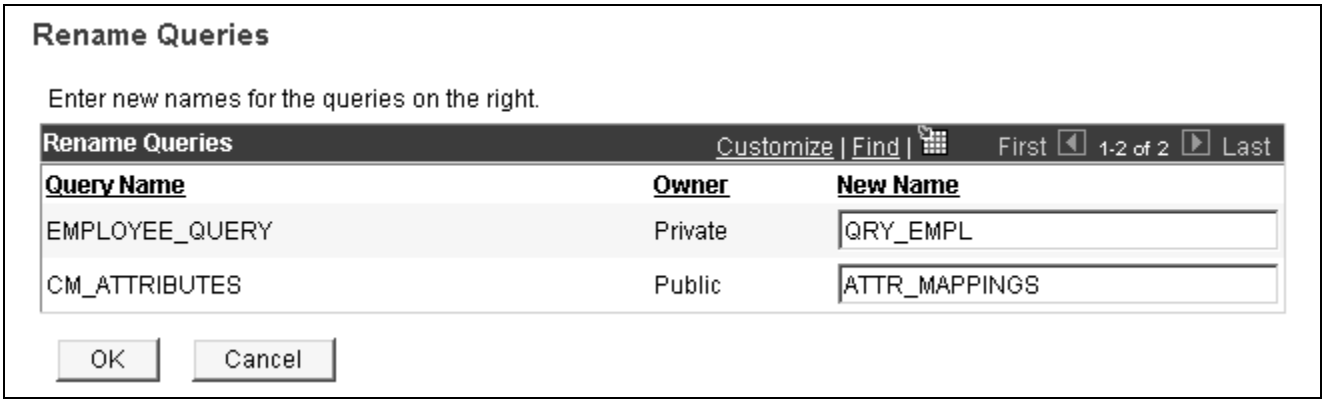
3. Click the Edit link on the row of the query.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleCode Language Reference, “Meta-SQL”

Renaming Queries

If your security access allows, you can change the name of a query from the Query Search Results page.



Rename Queries page

To rename a query:

1. On the Query Manager Search Results page, select the query or queries that you want to rename.
2. Select *Rename Selected* from the Action drop-down list box.
3. Click Go.

   The Rename Queries page appears, providing a list of the current query names and query owners.
4. Enter new names for the queries in the New Name field.
5. Click OK to save your changes.

Deleting Queries

You can delete any public query that you have access to as well as any private query that you have created.

To delete a query:

1. On the Query Manager Search Results page, select the query that you want to delete.
2. Select *Delete Selected* from the Action drop-down list box.
3. Click Go.

   The Query Delete Verification page appears.
4. Click *Yes* to confirm the deletion or *No* to avoid deletion.

Updating Existing Queries

There may be times when you'd like to update a query to reflect new conditions or copy an existing query and modify the new query for other uses. You can open a query, examine it to see if it is suitable, and then use the Save As function to save it with a new name.

To update an existing query:

1. On the Query Manager Search Results page, find the query that you want to modify and click the Edit link on the row of the query.

   The Fields page appears.
2. Navigate to the page that you would like to modify.
3. Enter the new information on the page.

4. Click either the Save button to update the existing query, or click the Save As link to save a different instance of the query under a new name.

Automatically Repairing Existing Queries

There may be times when a record definition that is used in a query changes. When this occurs, PeopleSoft Query automatically repairs the query when it is opened. A warning message displays informing the user about the problem and what actions were taken:

Problem	Action
Field deleted from the record definition is a selected field.	The field is removed from the selected list. If the field is the only field selected, the query cannot be saved.
Field deleted from the record definition is used in a prompt.	No action taken. This does not affect the prompt unless the field has been completely removed from the database, and the prompt label is either a short or long translate.
Field deleted from the record definition is used in an expression.	The field is removed from the expression. This may result in an invalid expression, but the query can be saved.
Field deleted from the record definition is used in a criterion.	The criterion is removed. If criterion is a subquery criterion, all lower subqueries are deleted.
Record deleted is the first record in the query.	Error returned. The query cannot be repaired.
Record deleted is not the first record.	The record and all fields are removed. **Note.** The actions specified previously for deleted fields apply.
Record deleted contains hierarchy joins below it.	Record and all records joined below are removed. **Note.** The actions specified previously for deleted fields apply.

Note. If a record has been deleted, the query will no longer appear in the list of queries because you no longer have access to all of the records in that query. To open such a query, you will need to use Query API.

Scheduling Queries

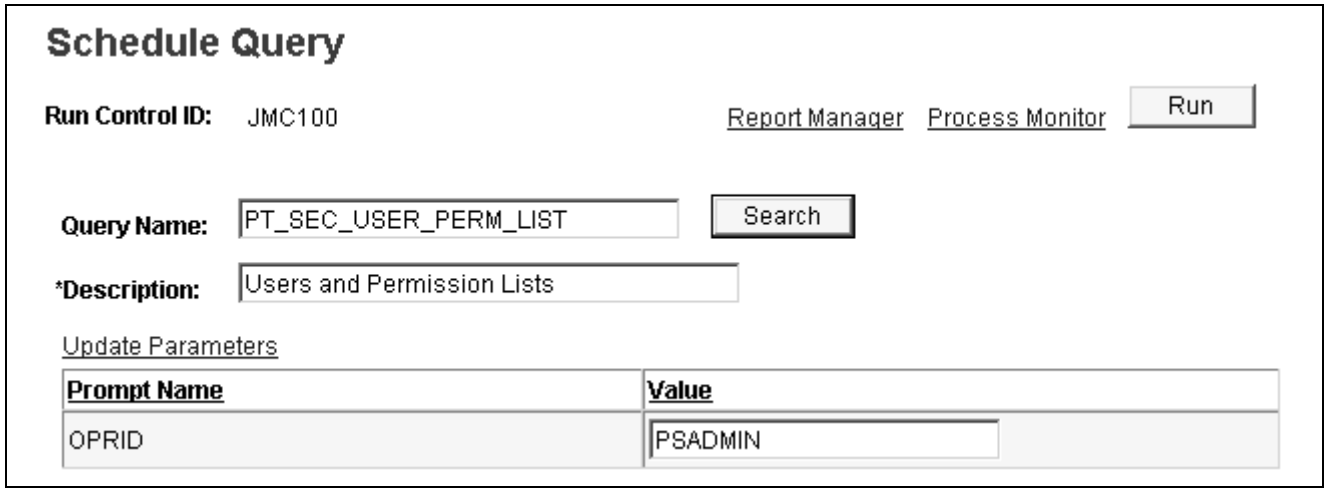
Query Manager interacts with PeopleSoft Process Scheduler to give users the ability to schedule queries.

This section discusses how to:

- Submit process requests.
- Select process requests.
- Use Process Monitor.
- View output in Report Manager.
- Specify a user's language.

Submitting Process Requests

A process request enables you to submit a job or process to run. The Process Request page enables you to specify such variables as where to run the process and in what format to generate the output based on a run control ID.



Scheduled Query Run Control page

To submit a process request:

1. Select Reporting Tools, Query, Schedule Query.

   The Schedule Query Search page appears.

2. Select an existing Run Control ID, or select the Add New Value tab to enter a new ID.

   The Query Process Request dialog box appears.

3. Select the query for which you want to schedule and update any prompt parameters.

   Use the Update Parameters link to select or change the value required for each available prompt. When values have been selected, they appear in the Prompt Name and Value fields.

   Note. If you have one or more Asian languages installed, select the desired language from the Asian Font drop-down list box. This drop-down list box appears *only* if you have one or more Asian languages installed.

4. Click the Save button to save changes and remain on the Schedule Query page.
5. Click the Run button to display the Process Scheduler Request page.

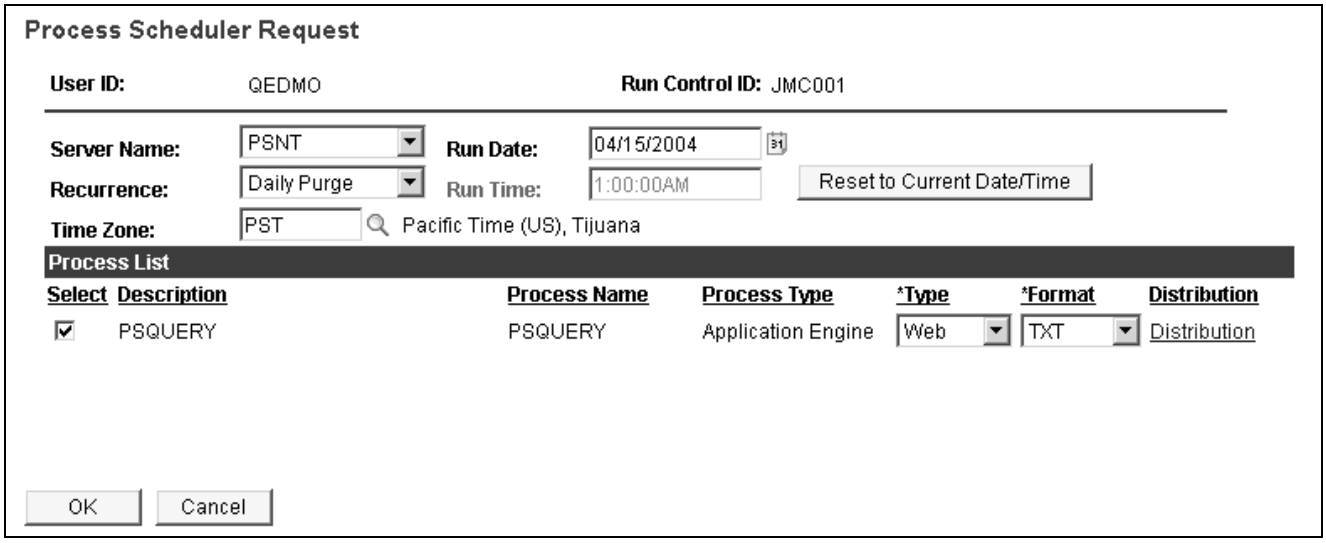
   When scheduling queries from Query Manager or Query Viewer, the Run button is replaced with an OK button.

6. Click the Process Monitor link to view the status of your request; click the Report Manager link to view the output of your request.

Selecting Process Requests

The Process Scheduler Request page enables you to set the server, run date and time, how often the process runs (the recurrence of the process), output type, and format.

To select a process request:



Process Scheduler Request page

1. Open the Process Scheduler Request page.
2. Complete the fields on this page.

Type	The destination types for this process are: *Web:* Sends the output of the process to the report repository, including log and trace files. The format of the report is the format selected on this page. *Window:* Sends the output to a new browser window. All output of the process is also sent to the report repository, including log and trace files. The format of the report is the format selected on this page. *File:* Enables you to write the output to a file that appears in the Output Destination.
Format	Click to select the output format for this job or process.
Distribution Detail	When the output distribution type is Web, click the Distribution link to display the Distribution Detail page, where you can enter additional information.

3. Click OK to run the query.

   The system displays the Query Process Request page. The process instance number appears below the Schedule button.

4. Click the Process Monitor link to view the status of your request.

   The Process List page appears. The Run Status field reveals the status of your scheduled or running process.

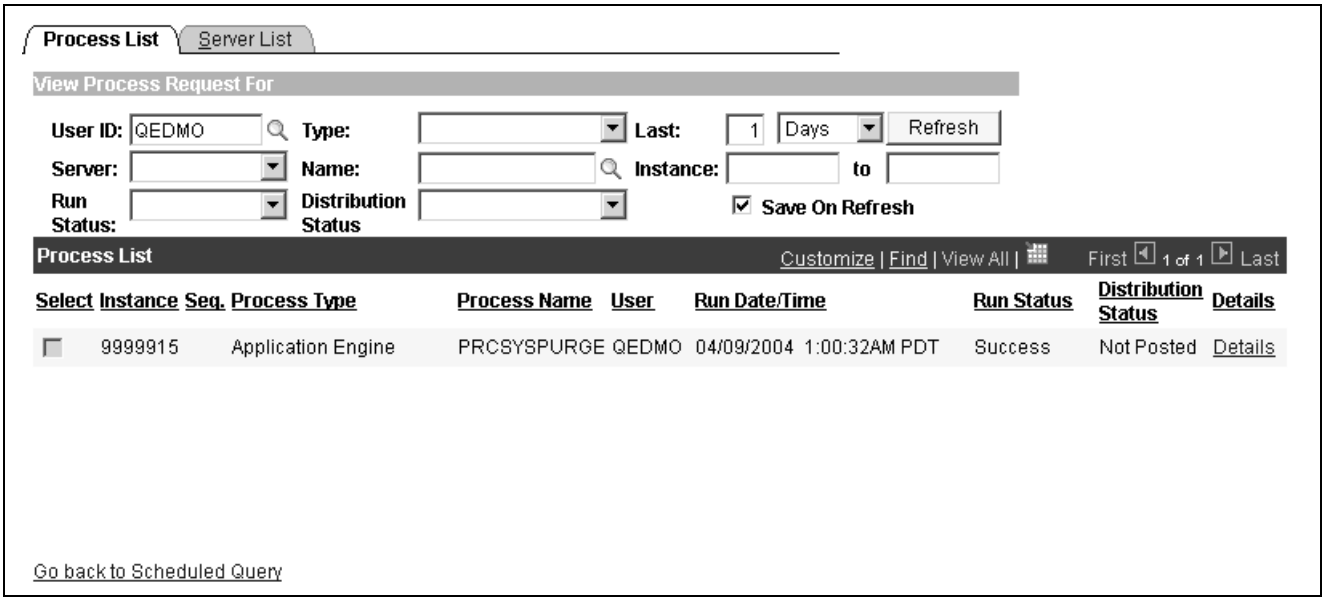
Using Process Monitor

Process Monitor consists of two pages: the Process List page and the Server List page.

- The Process List page lets you monitor the process requests you have submitted.

  You can select filtering options (for example, process type and run status) so that you view only the process requests that meet the selected criteria. And you can view details associated with particular process requests.

- The Server List page lets you monitor the PeopleSoft Process Scheduler server agents within your system.



Process Monitor - Process List page

User ID View the processes submitted by a particular user ID. Usually, you view by your own user ID.

Type View by a particular process type (for example, *Application Engine*).

Last Specify an interval of time by which to limit the process requests that appear in the list. Enter a numerical value in the edit box preceding the drop-down list, and then select a unit type from the drop-down list. Values are: *Days*, *Hours*, or *Minutes.*

Server Select to view processes run on a particular server.

Name View processes by a process name.

Instance Specify a range of instances by which to limit the process requests that appear in the list. To limit the view to a single request, enter the required instance ID in the first text field.

Run Status Select if you want to view processes by a specific status, such as *Success* or *Error.*

Save on Refresh Select the check box to save filter criteria changes when you select the Refresh button.

Refresh Click to check the current status of a process. This button refreshes the list.

Instance Displays the process instance; that is, the order in which the process appears in the queue. This number is automatically generated.

Sequence This field is blank; it is not used for query processes.

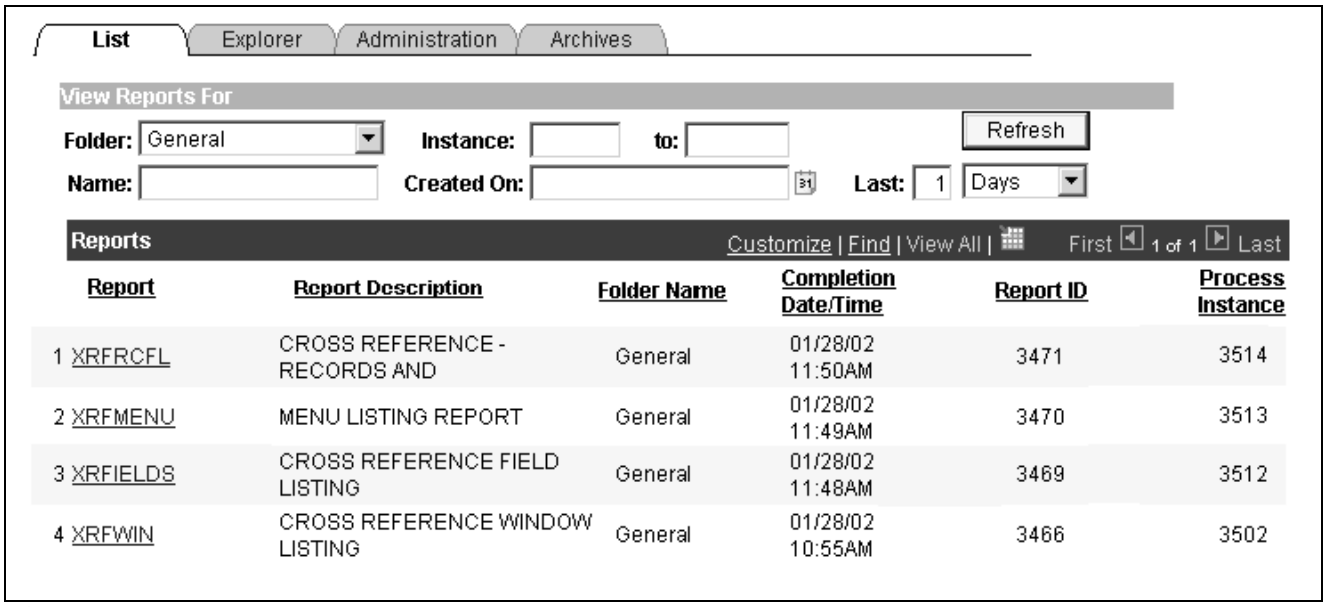
User	The ID of the user who submitted the process.
Details	Click to open the Process Details page.
Go back to Scheduled Query	Click to return to the Query Process Request page.
Report Manager	Click to view your query reports.

Viewing Output in Report Manager

Report Manager is like your own personal inbox of reports and process output. It provides a secure way to view report content, check the posting status of your output, and see content detail messages.

View all of your reports by opening your Report List in your browser.

Select Reporting Tools, Report Manager, or click the Report Manager link located on the Schedule Query page.



List page

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler, "Using Process Monitor"

Enterprise PeopleTools 8.45 PeopleBook: Using PeopleSoft Applications, "Working With Processes and Reports"

Specifying a User's Language

For scheduled queries, the system uses the language specified in the user's profile. It does not use the language that is selected during sign-on. The system also uses the international and regional settings that the user has specified using My Personalizations. If no personal settings have been specified, the system uses the default installation international settings.

Note. Most PeopleSoft components can default to international settings from the browser if the user has not set any user specific settings. However, this is *not* available for scheduled queries or any PeopleSoft Process Scheduler processes.

See Also

Enterprise PeopleTools 8.45 PeopleBook: Security Administration, "Administering User Profiles"

Organizing Queries

This section discusses how to:

- Add queries to the My Favorite Queries list.
- Copy a query to another user's list of queries.
- Move a query to an organization folder

Adding Queries to the My Favorite Queries List

The Query Manager and Query Viewer search pages always include a list of queries called *My Favorite Queries.* If you use certain queries often, you can put the queries in this list for easy access.

To add a query to the My Favorite Queries list:

1. On the Query Manager Search Results page, select the query that you want to add to the My Favorite Queries list.
2. Select *Add to Favorites* from the Action drop-down list box.
3. Click Go.

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

Copying a Query to Another User's List of Queries

The Query Manager allows you to copy a query from your list of queries to another user's list of queries.

Note. You can only copy nonpublic queries to another user's list of queries.

If the target user does not have permission to access all of the records in a copied query, that query will not appear in the target user's list of queries. Once permission has been granted, the query will then appear in the list.

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

1. On the Query Manager Search Results page, select the query or queries that you want to copy.
2. Select *Copy to User* from the Action drop-down list box.
3. Click Go.

   The Enter User ID dialog box appears.
4. Enter the user ID of the user to whom you would like to copy the query.
5. Click OK.

Moving a Query to an Organization Folder

Organizing queries in folders helps you provide easy access to the queries using appropriate categories. To move a query to an organization folder:

1. On the Query Manager Search Results page, select the query or queries that you want to move to an organization folder.
2. Select *Move to Folder* from the Action drop-down list box.
3. Click Go.

   The Move to Folder dialog box appears.
4. Select one of the following:
   - *Select an existing folder to move to:* Select the folder from the drop-down list box to which you would like to move the queries.
   - *OR enter a folder name to move to:* Enter the name for a new folder to which you would like to move the queries.
5. Click OK.

CHAPTER 5

Working with Advanced Query Options

This chapter discusses:

- Working with aggregate functions.
- Working with subqueries.
- Working with unions.
- Joining records.

Note. Familiarity with Structure Query Language (SQL) is helpful when writing more advanced queries.

Working with Aggregate Functions

In a standard query, each row in the result set that PeopleSoft Query returns corresponds to an individual row in the table that you're querying. Sometimes, however, what you want is a summary of the information in multiple rows. For example, you might want to know how many customers you have in each state. You can query for this kind of summary information using *aggregate functions*.

This section provides an overview of aggregate functions and discusses how to apply an aggregate function to a field.

Understanding Aggregate Functions

An aggregate function is a special type of operator that returns a single value based on multiple rows of data. When your query includes one or more aggregate functions, PeopleSoft Query collects related rows and displays a single row that summarizes their contents.

For example, suppose you have an Order table that includes (among other fields) a customer ID and an amount for each item ordered. You'd like to find out how much each customer has ordered, so you create a query that selects the customer ID and amount fields. Without any aggregate functions, this query would return the same number of rows as there are in the table. If Stuart Schumacher ordered 10 items, you'd see 10 rows with his ID in the Customer ID column. On the other hand, if you apply the aggregate function Sum to the amount field, you will get just one row for each customer ID. PeopleSoft Query takes all the rows with the same value in the nonaggregated column (Customer ID) and collapses them into a single row. The value of the amount field in Stuart Schumacher's row would be the sum of the values from the 10 rows.

The following table lists the aggregate functions that you can apply to a field using PeopleSoft Query:

Aggregate Function	Action
Sum	Adds the values from each row and displays the total.
Count	Counts the number of rows.
Min	Checks the value from each row and returns the lowest one.
Max	Checks the value from each row and returns the highest one.
Average	Adds the values from each row and divides the result by the number of rows.

Applying an Aggregate Function to a Field

When you apply an aggregate function to a field, you're redefining how PeopleSoft Query uses the field throughout the query. Essentially, PeopleSoft Query replaces the field, wherever it occurs, with the results of the function. If you select the field as a display column, PeopleSoft Query displays the aggregate values; if you use the field as an order by column, PeopleSoft Query orders the results based on the aggregate values.

Note. If you do not want PeopleSoft Query to redefine the field in this way—for example, if you want to display both the individual row values *and* the results of the aggregate function—create an expression that includes the aggregate function rather than applying the function directly to the field.

To apply an aggregate function to a field:

1. In Query Manager, select the Fields tab.
2. Click the Edit button associated with the appropriate field.

   The Edit Field Properties page appears.
3. Pick the aggregate function that you want to use for this field, and click OK.

   The abbreviation for the selected function appears in the Agg column. If a function is not available for the field you have selected, the Edit Field Properties page does not close. For example, you cannot use Sum with a character field.

Note. In addition to the previously listed aggregate functions, any aggregate function supported by the underlying database can be used by creating an expression component.

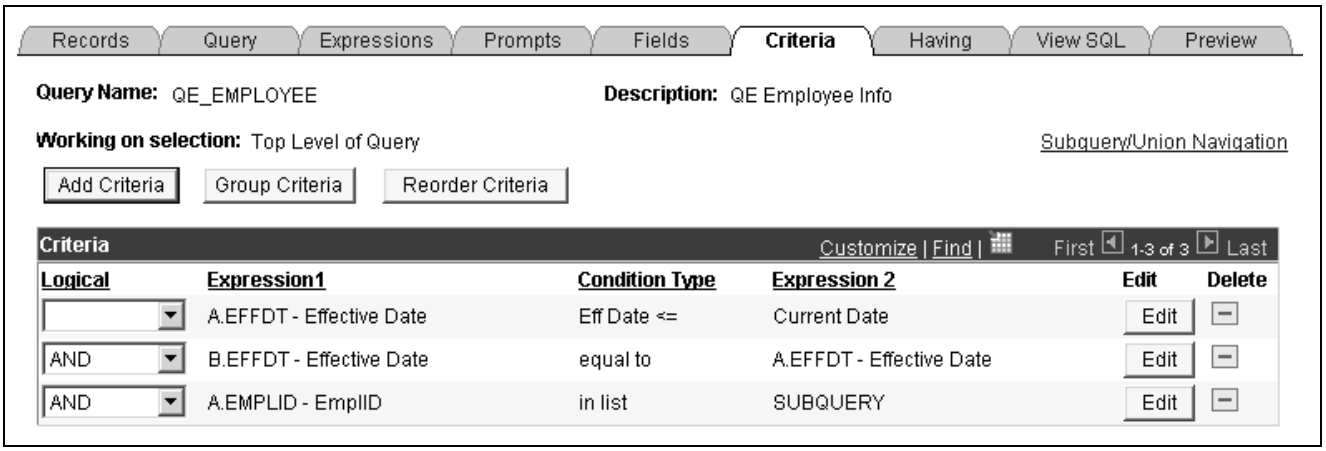
See Also

Chapter 3, "Defining Selection Criteria," Defining Expressions, page 27

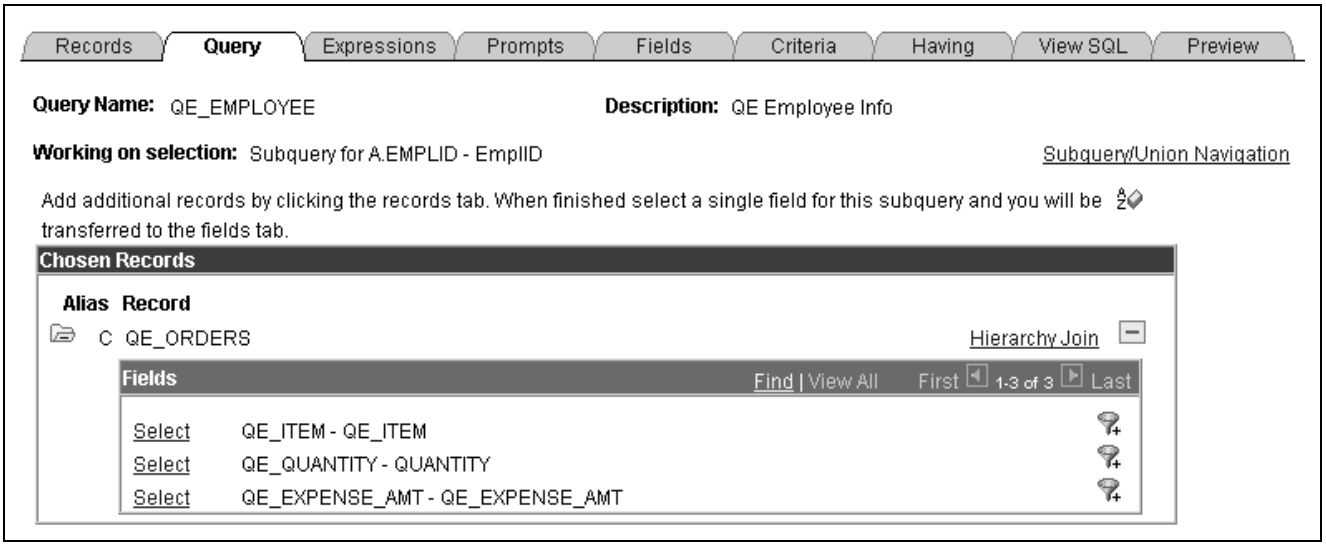
Working with Subqueries

A *subquery*,sometimes called a *sub-SELECT*, is a query whose results are used by another query. The main query uses the subquery's result set as a comparison value for a selection criterion.

You create a subquery when you need to compare a field value to the results of a second query. Suppose, for example, that you want a list of employees who are not members of any professional organizations. For each employee in the PERSONAL_DATA table, you must find out whether their employee IDs are in the MEMBERSHIP table. In other words, you must compare the value in the PERSONAL_DATA.EMPLID field to the results of a subquery that selects the EMPLID values from the MEMBERSHIP table. Following are examples of the Criteria page when using a subquery and the Query page when creating a subquery:



Using a subquery



Subquery - Query page

To create subqueries:

1. From the Criteria page, select Subquery as the comparison value.

   PeopleSoft Query displays a special Query Manager view where you can select a record. See Subquery − Query page above.

2. From the Subquery - Query page, select the required field.

Note. A subquery can have only one field. However, you can create multiple subqueries.

When you have defined subqueries and unions, a Subquery/Union Navigation link appears at the top each page of the main query and the subqueries.

3. Click the Subquery/Union Navigation link to display a hierarchical view of the main query and all subqueries and unions.

   Use the hierarchy to navigate between the main query, subqueries, and unions.

Working with Unions

Unions enable you to get the results from two or more separate queries at the same time. You can create a union of multiple queries 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.

Note. Translate values, long or short description, cannot be displayed in a union query. Only the code for the field can be selected for output display.

You must understand SQL to ensure that you create logical union queries.

To create a union:

1. On the bottom of each Query Manager page, click the New Union link.

   PeopleSoft Query automatically switches to the record tab of the Query Manager so that you can start defining the second query. Define that query in the same way that you define other queries.

   When you're working on a union, each individual selection looks like an independent query, and for the most part they *are* independent. However, the first selection in the union—the one you started before clicking the New Union link—has a special status. PeopleSoft Query determines the ordering of the rows and columns based on what you specify for the first selection. It also uses the column headings defined for the first selection.

2. Navigate between the main query, subqueries, and unions using the Subquery/Union Navigation link.

Joining Records

Query Manager enables you to create queries that include multiple-table *joins.* Joins retrieve data from more than one table, presenting the data as if it came from one table. PeopleSoft Query links the tables, based on common columns, and links the rows on the two tables by common values in the shared columns.

Joins are what make relational databases relational. Using joins, you define relationships among fields when you query the records, not when you create the records. Because PeopleSoft records are highly normalized (they each describe one kind of entity), it is easy to use Query Manager to create joins.

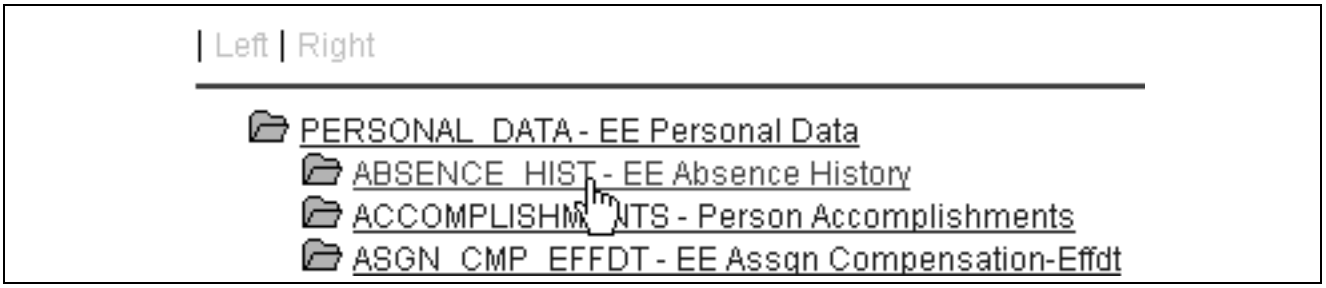
The procedure for joining tables differs depending on how the tables being joined are related to each other. Query Manager recognizes three types of joins: record hierarchy, related record, and any record.

This section discusses how to:

- Create record hierarchy joins.
- Create related record joins.
- Create any record joins.
- Create outer joins.
- Create left outer joins.

Creating Record Hierarchy Joins

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 keys.) Specify the parent/child relationship using the Parent Record Name option in PeopleSoft Application Designer.



Selecting the second record

To create a record hierarchy join:

1. Choose the base record for your query and select the appropriate fields and criteria.
2. From the Query page, click the Hierarchy Join link.

   All of the records that have a parent/child relationship with your selected record appear.
3. Select the second record for the join.

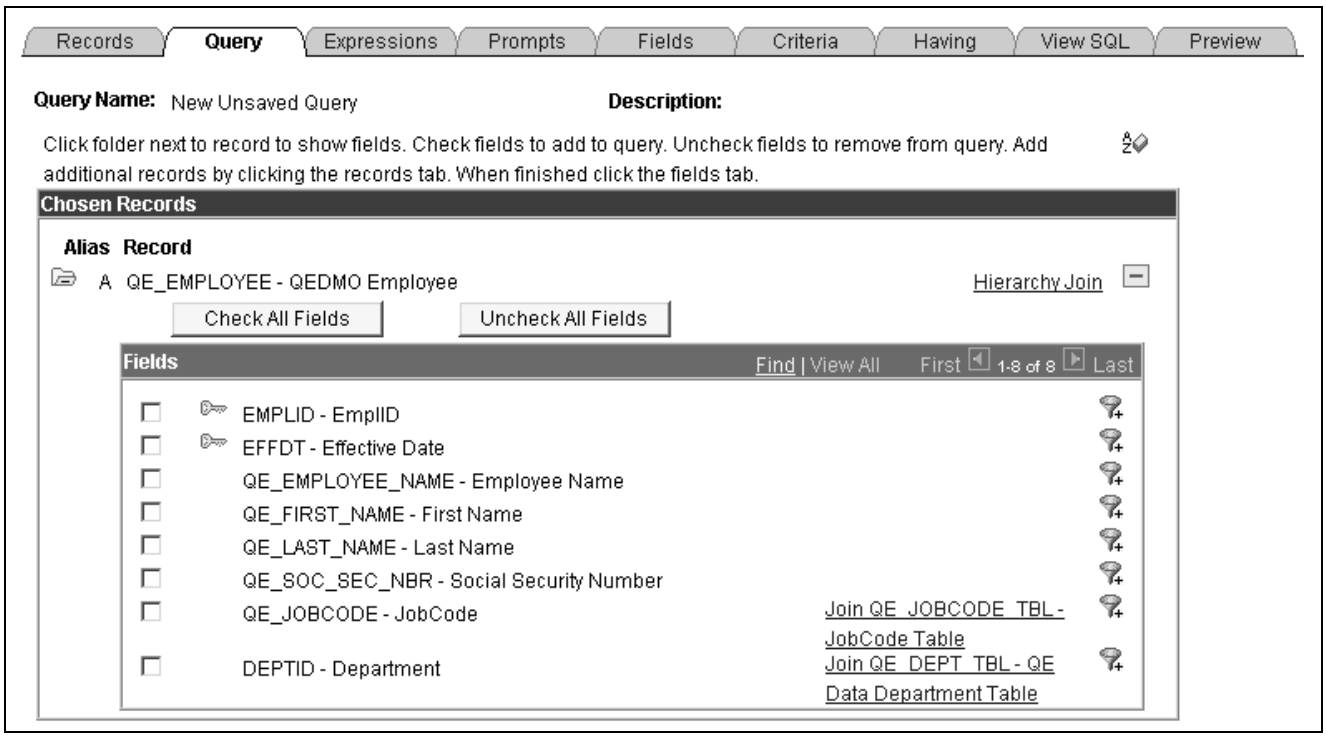
   In our example, we are selecting ABSENCE_HIST.

   The join is reflected on the Query page.

Creating Related Record Joins

In a related record join, you can automatically join two records based on a relationship that has been predefined in the record designer. 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.

The following example shows that the Disciplinary Actions record can be joined to the Personal Data record by either the EMPLID or the SUPERVISOR_ID field:



Query page showing related record join links

To create a related record join:

1. Choose the base record for your query and select the appropriate fields and criteria.
2. From the Query page, click the Related Record Join link.

   The join is reflected on the Query page.

Creating Any Record Joins

Using Query Manager, you can create a join between two records (any record join) by selecting your initial base record, defining its output fields and associated criteria, and then returning to the Record page to select the second record.

If you have the Enable Auto Join preference selected in the Query Preferences dialog box, PeopleSoft Query automatically attempts to join the new record to the existing record by looking for matching columns on the two records. To navigate to the Query Preferences dialog, click the Preferences link.

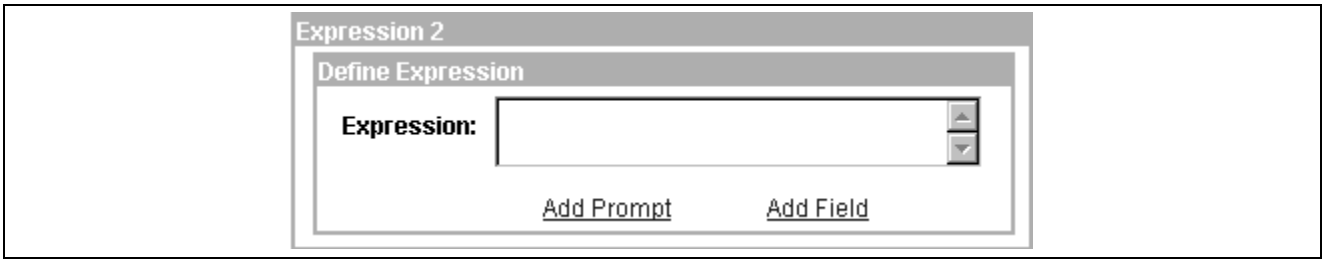
Creating Outer Joins

An outer join forces a row from one of the participating tables to appear in the result if there is no matching row.

Note. You can only create an outer join using this method if you have an Oracle 8 database. If you use a platform other than Oracle 8, you can create an outer join equivalent or create a left outer join using PeopleSoft Query's left outer join feature.

See Chapter 5, "Working with Advanced Query Options," Creating Left Outer Joins, page 62.

To create an outer join, you must include a plus sign in parentheses *(+)* after the key fields of the subordinate record in the criteria that link the records. To produce this syntax, you cannot use the predefined joins. You must perform an any record join and code an expression that contains the (+) instead of a field. Following is an example of the Define Expression dialog box:



Define Expression dialog box

This section discusses how to:

- Create an outer join for Oracle 8.
- Create an outer join equivalent for non-Oracle 8 platforms.

Creating an Outer Join for Oracle 8

To create an outer join for Oracle 8:

1. From the Criteria page, select the required field from the primary record.
2. In the Condition Type Operator field, accept the value of *Equal To,* and in the Expression 2 Type field, accept the value of *Expression.*

   The Define Expression dialog box appears.
3. Click Add Field.
4. Select the required field from the secondary record.
5. Manually enter *(+)* after the field name.

Creating an Outer Join Equivalent for non-Oracle 8 Platforms

If you use a platform other than Oracle 8, use this method to achieve the same effect as an outer join.

Note. If you use a platform other than Oracle 8, you can also create a *left* outer join using PeopleSoft Query's left outer join feature.

See Chapter 5, "Working with Advanced Query Options," Creating Left Outer Joins, page 62.

For example, to retrieve a list of all students and any evaluation information on file, the first select must retrieve those students who have not completed an evaluation; the second select must retrieve those students who have completed an evaluation.

To perform an outer join equivalent for the previous example:

1. Using the Student_Data record, select *Customer_ID* and *Name.*

   Because you will be selecting two different fields from the Student_Eval record and you want them to have their own columns, you must create two dummy fields for your first record.
2. Create two different expressions and select them for output.
3. Save the query.

4. Create your subquery to find those students who have not completed an evaluation.

   This completes your first select. If you run the query at this point, you will see only those students who did not completed an evaluation.

5. To join in the students who did complete an evaluation, create a union.
6. Using the Student_Data record, select *Customer_ID* and *Name* for output.
7. Join the Student_Eval record using a record hierarchy join.
8. Select *Course* and *Course_Rt* for output.

Creating Left Outer Joins

PeopleSoft Query enables you to easily create a 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.

Note. This feature is not available for the Oracle 8 platform.

To create a left outer join on a new query:

1. On the Query Manager search page, click the Create New Query link.
2. On the Records page, search for the first (left) record for the left outer join.
3. Click the Add Record link on the same row as the record you would like to add.

   The Query page appears.

4. Select the appropriate fields to add to the query.
5. Navigate to the Records page.
6. Search for the joining record.
7. Click the Join Record link on the same row as the joining record.
   - If the Enable Auto Join preference is selected, the Join Type and Record to Join dialog box appears.
   - If the Enable Auto Join preference is not selected, the Join Type dialog box appears.
8. Select Join to get additional fields only (Left outer join).
9. Complete the join.
   - If the Enable Auto Join preference is selected, click the record name to join with.
   - If the Enable Auto Join preference is not selected, click OK.
10. Define the join criteria.
    - If the Enable Auto Join preference is selected, the Auto Join Criteria dialog box appears.

      You may deselect the criteria from the query. You may also click Add Criteria to add or edit criteria or conditions (2–3 tier client only). If there are no common keys between the two join records, a message appears instead of the Add Criteria dialog box.

    - If the Enable Auto Join preference is not selected, the Auto Join Criteria dialog box does *not* appear.

      If desired, navigate to the Criteria page to add criteria to the On clause of the outer join. The This criteria belongs to drop-down list box specifies where the criteria will appear. Select the alias that corresponds to this join record.

11. Define the effective date criteria.

- (2–3 tier client) If the joined record is an effective-dated record, the Effective Date Criteria dialog box appears.

  You may accept the defaults or change them as desired.

- (4–tier PeopleSoft Pure Internet Architecture) If the joined record is an effective dated record, a message appears stating that an effective date criteria has been automatically added.

  If desired, you may navigate to the Criteria page to change the defaults for this criteria.

12. To ensure that the left outer join completed successfully, you may navigate to the Query page.

    Text for the joined records confirms a successful left outer join.

Note. If you use PeopleSoft Query with the DB2 UDB platform, the DB2 UDB platform will not allow you to have a subquery in the ON clause of a left outer join. For example:

```
SELECT A.ROLENAME, A.DESCR FROM
(PSROLEUSER B LEFT OUTER JOIN  PSOPRDEFN C ON
B.ROLEUSER IN (SELECT F.OPRID FROM
 PSOPRDEFN F WHERE F.OPRID IN (’AMA1’,’AMA2’,’AMA3’)))
```

This code yields the following error message: *SQL0338N An ON clause associated with a JOIN operator or in a MERGE statement is not valid.*

APPENDIX A

Creating Workflow Queries

This appendix provides an overview of workflow queries and discusses how to define a workflow query.

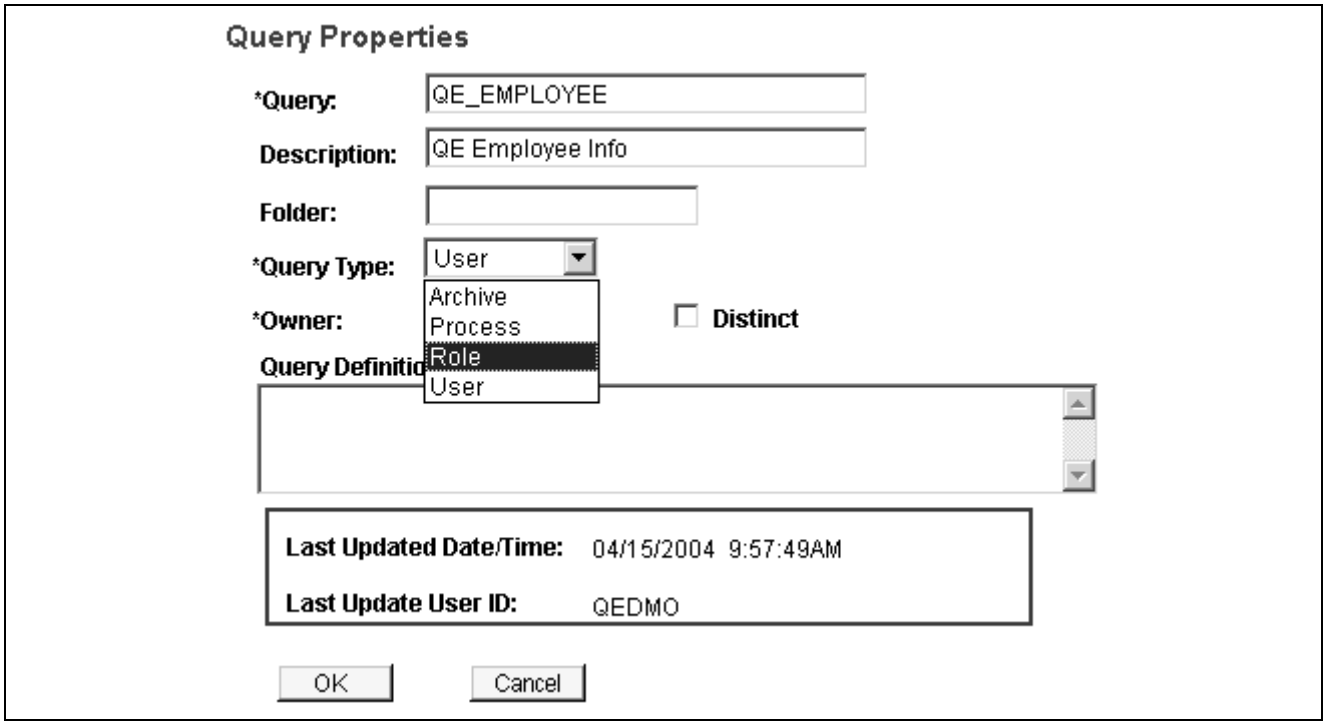
Understanding Workflow Queries

Workflow queries—also called *role queries*—are queries that PeopleSoft Workflow uses as part of automated business processes to determine which users should receive work items.

Because these queries are run by the system rather than by users, the PeopleSoft application does not run the same prequery security checks. In particular, the application does not check which access groups to which the user running a workflow query has access — because the user is a workflow agent. (For this reason, you may not want to allow all users to create workflow queries.)

Defining Workflow Queries

Use the Query Properties page to define a workflow query.



Query Properties page

To define a workflow query:

1. From a Query Manager page, select the Properties link.

   The Query Properties page appears.

2. Select the query type of *Role*, and click OK.

   The query type of *Archive* refers to queries intended for archiving. These queries are generally only used by the PeopleSoft Data Archive Manager.

   The query type of *User* refers to any standard query.

   The query type of *Process* refers to queries that are intended to run periodically by batch processes.

PeopleSoft recommends that you use a naming convention to distinguish the different types of queries:

The Role query option refers to the fact that PeopleSoft name its role queries with names that begin with [ROLE].

See Also

Appendix B, “PeopleSoft Query Security,” Using Query Profiles, page 72

APPENDIX B

PeopleSoft Query Security

With PeopleSoft Query security, you can control the query operations that users can perform and the data to which they have access. This chapter discusses how to:

- Use query access group trees.
- Use row-level security and query security record definitions.
- Use query profiles.

Using Query Access Group Trees

This section provides an overview of query access group trees and discusses how to:

- Create query trees.
- Grant and restrict access to groups.
- Enable the query access list cache.

Understanding Query Access Group Trees

PeopleSoft Query uses *query access group trees* to control security of the tables in your PeopleSoft database. You define a hierarchy of record components, based on logical or functional groupings, and then give users access to one or more branches of the tree. Users can use PeopleSoft Query to retrieve information from only those tables whose record definitions they have access to.

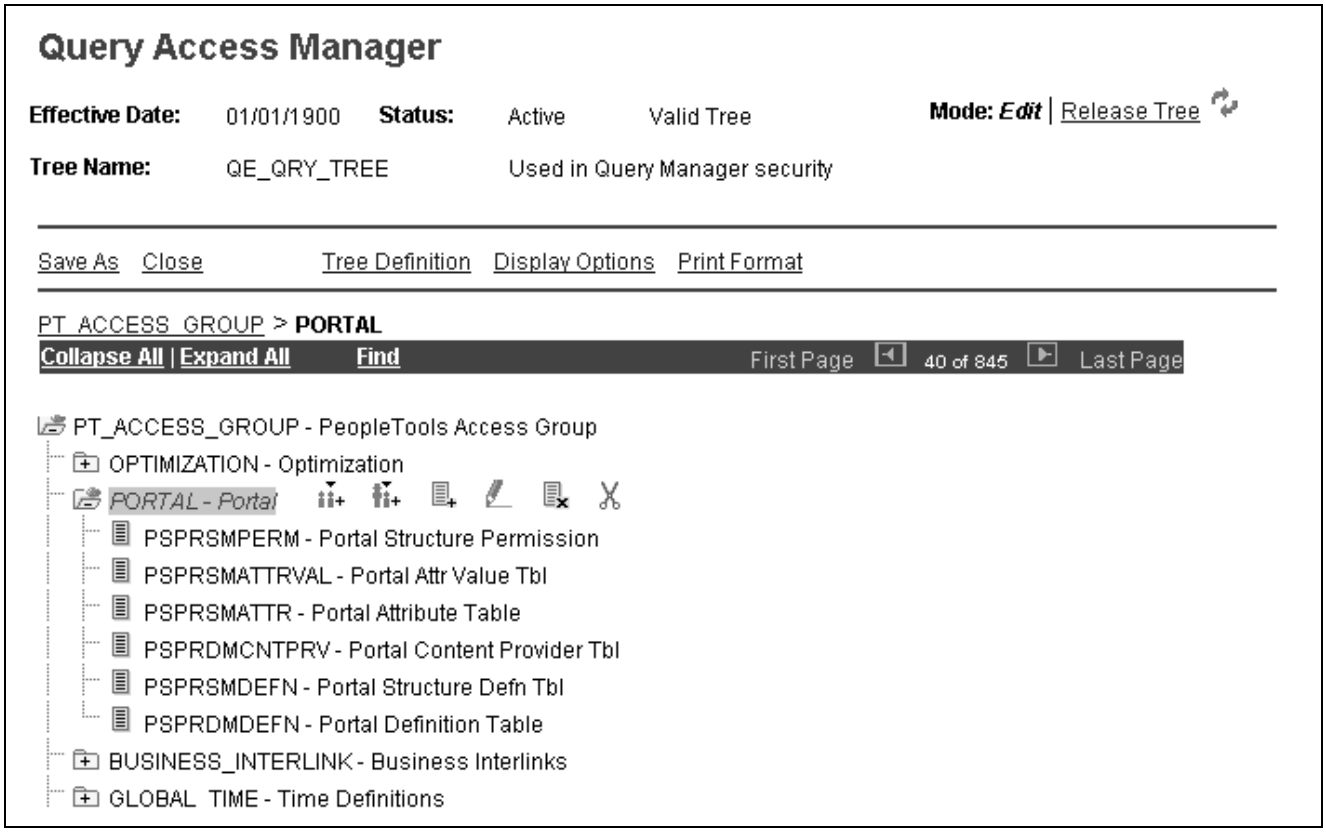
Using PeopleSoft Query Access Manager, you can create, view, and update query access group trees.

Query access group trees contain two types of nodes: groups and records.

- Groups represent of a set of child groups or records.
- Records represent a PeopleSoft record definition.

Creating Query Trees

Access the Query Access Manager page.



Example of a query access group tree in Query Access Manager

PeopleSoft provides sample trees with all of its applications. You can customize these trees; however, because these trees may get replaced when you upgrade to subsequent application releases, PeopleSoft recommends that you create your own query trees based on your organization's needs.

In your query trees, include all record components that you want users to be able to query. However, you do not have to put all record components in the same query tree. Instead, you can use the sample query trees to provide access to the standard PeopleSoft record definitions, but create additional query trees for record definitions that you want to add during the course of customizing your system. This strategy enables you to take advantage of the sample trees but avoid overwriting your changes during future application upgrades.

How you organize the contents of your query trees depends on the needs of your organization and users. For example, for nontechnical or casual users, you might want to create small trees that are not intimidating. To simplify the trees, you can create separate trees that contain subcategories of each function. For example, you could create separate trees for human resource, general ledger, and projects record components so that users in each region can access only those record components that they use.

It is also a good idea when creating your tree to have an access group that includes all components of the tree. This makes it easier to give users access to all tables—you need only to add one row on the Access Groups tab in Query Security.

Note. Consider adding record components to your query trees in a hierarchy that matches the parent/child relationship of records in your database. Though you do not have to organize records this way—PeopleSoft Application Designer actually controls the parent/child hierarchy in your database—you will probably find it helpful to keep your query trees consistent with your database structure.

Granting and Restricting Access to Groups

Once you've built a query tree, you must give users access to one or more of its access groups. They can then generate queries on any tables in the access groups that are accessible to them.

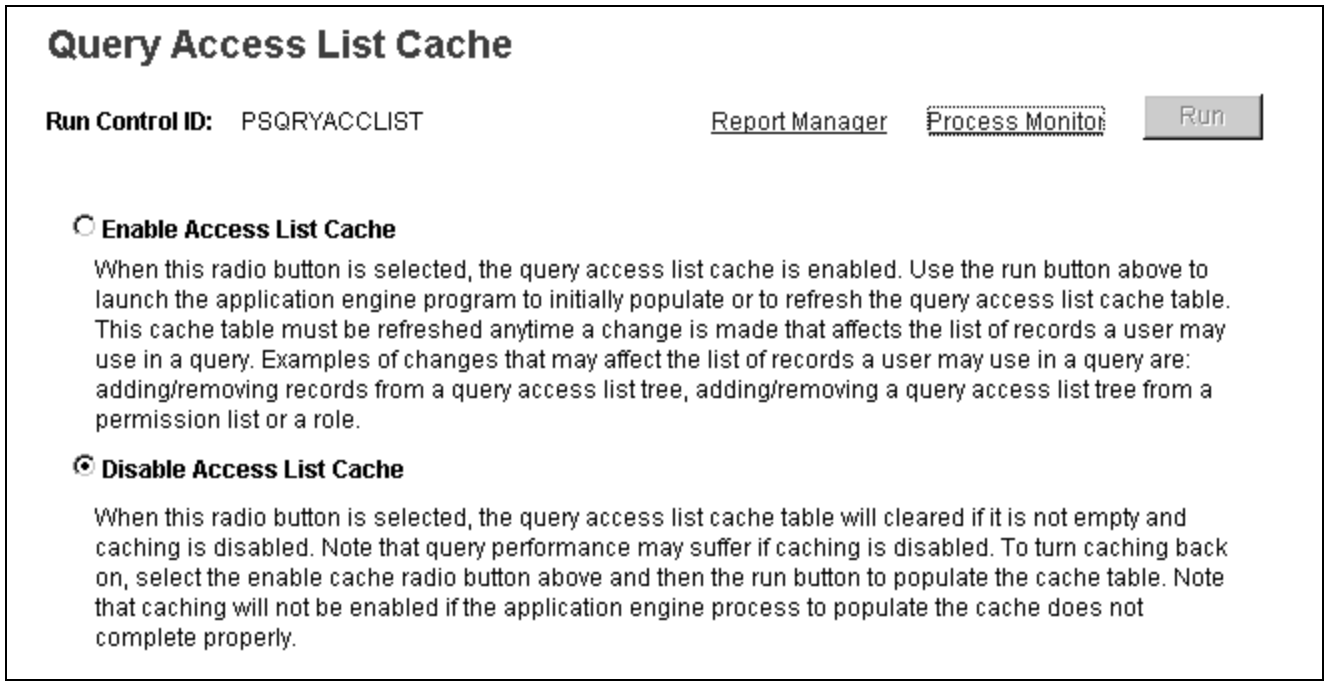
To create new queries, or even to run existing ones, users must have access rights to the record components used in the queries. Once you've built your query trees, you must grant users access to them. You can grant and restrict access to entire query trees or portions of them through the Security, Permission List Access Groups page.

See Also

Enterprise PeopleTools 8.45 PeopleBook: Security Administration, "Implementing Query Security"

Enabling the Query Access List Cache

An optional query access list cache batch process is available for users who work with Query Manager, Crystal Reports, and PS/nVision. When the access list cache is enabled, the time taken by the system to retrieve the queries that match the search criteria entered is greatly improved.



Security - Query Access List Cache page

To enable the access list cache:

1. Select PeopleTools, Security, Query Security, Query Access List Cache.
2. Select Enable List Cache.
3. Click the Run button to run the process.

   If the process does not complete, the cache will be disabled.

Note. Rerun the process when changes have been made to Query Access Groups or Query Access Group settings on Roles or Permission Lists.

Using Row-Level Security and Query Security Record Definitions

This section discusses how to:

- Enforce row-level security.
- Use query security record definitions.

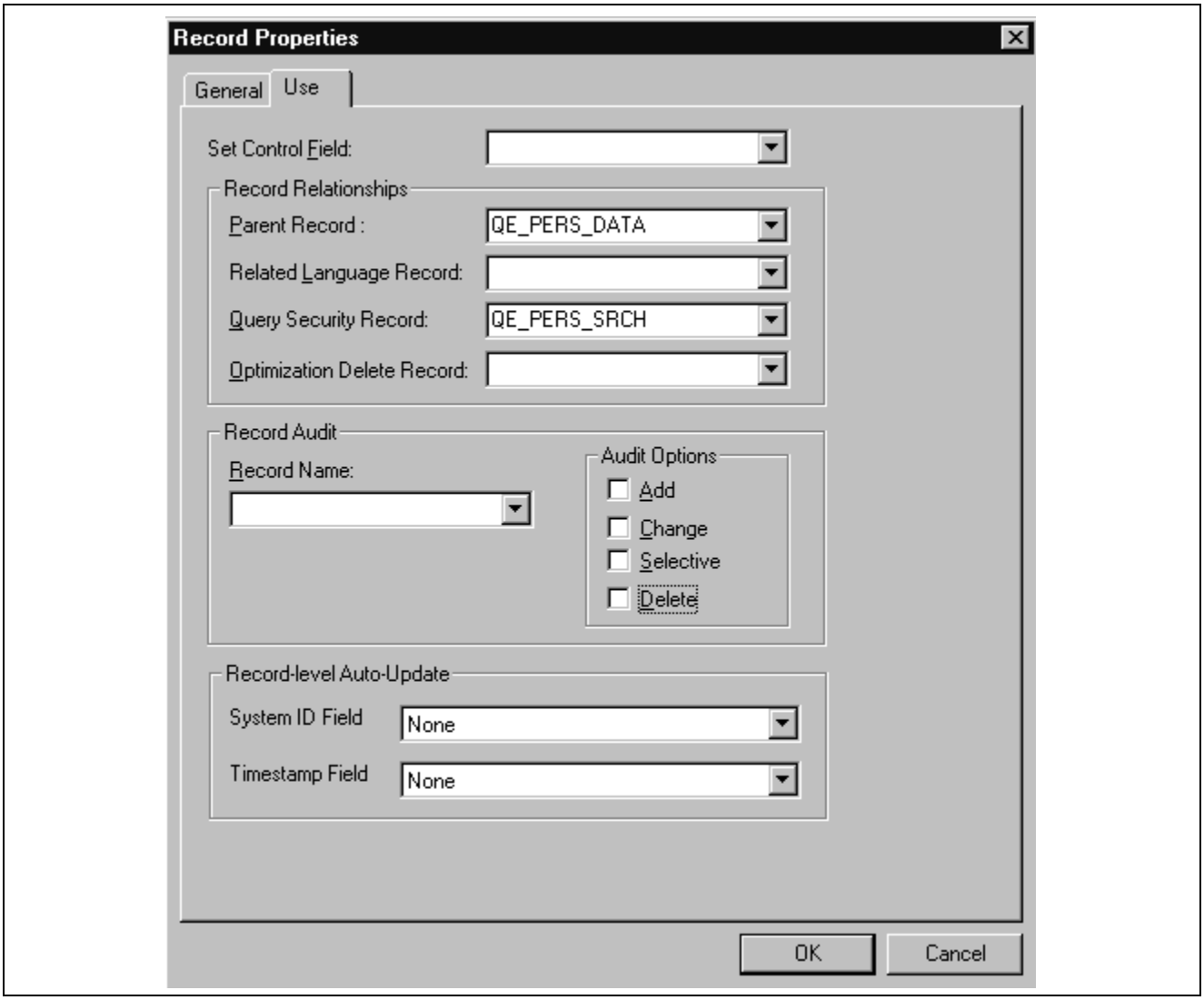
Enforcing Row-Level Security

By default, when you give PeopleSoft Query users access to a record definition, they have access to all the rows of data in the table built using the associated record definition. In some cases, though, you may want to restrict users from seeing some of those data rows. For example, you may not want your human resources staff to access compensation data for vice presidents or above. In other words, you want to enforce the *row-level security* feature offered by many PeopleSoft applications.

Row-level security enables users to access a table without accessing all rows on that table. This type of security is typically applied to tables that hold sensitive data. For example, you might want users to be able to review personal data for employees in their own departments but not for employees in other departments. To accomplish this, you would give everyone access to the PERSONAL_DATA table, but would enforce row-level security so that users could see only the rows where the DEPTID matches their own.

Note. PeopleSoft Query row-level security is enforced only when you are using PeopleSoft Query or Scheduled Query; it doesn't control runtime page access to table data.

PeopleSoft applications implement row-level security by using a query security record (typically a view) specified on the record definition that joins the data table with an authorization table. When a user searches for data in the data table, the system performs a related record join between the security record view and the base table (rather than searching the table directly). The view adds a security check to the search, based on the criteria you have set up for row-level security. For example, to restrict users to seeing only data from their own departments, the view would select from the underlying table only those rows where the DEPTID matches the user's DEPTID. You can specify the query security record on any record definitions property dialog box by selecting an appropriate view from the Query Security Record drop-down list box.



Using QE_PERS_SRCH view as a Query Security Record view

Note. Process and role queries override the automatic row-level query security logic that is applied to all other types of queries. For this reason, you should restrict access to creating these types of queries to administrative types of roles and not include any sensitive data columns in the select list for these types of queries. You can restrict access to creating/modifying these queries based on query profile settings that are assigned to a permission list. Also note that Workflow queries also override the row-level security logic.

Securing Data Through the Search Record

To secure data through the query security record view, create a query security record that has both of the following:

- The same key field as the base record that you are securing.
- One of the following three row-level security fields as a key field and not as a list box item:
  - OPRID (User ID).
  - OPRCLASS (Primary Permission List).
  - ROWSECCLASS (Row Security Permission List).

When one of the above fields is added as a key field, Enterprise PeopleTools automatically adds a WHERE clause when it does a select through the record. This forces the value to be equal to the current user's value.

Using Query Security Record Definitions

Implement row-level security by having PeopleSoft Query search for data using a *query security record definition.* The query security record definition adds a security check to the search.

Query security record definitions serve the same purpose as search record definitions do for pages. Just as a search record definition determines what data the user can display in the page, the query security record definition determines what data the user can display with PeopleSoft Query.

To get PeopleSoft Query to retrieve data by joining a security record definition to the base table, specify the appropriate query security record when you create the base table's record definition.

Note. PeopleSoft's row-level security views restrict users from seeing certain rows of data. If you specify a query security record for a given base record definition, PeopleSoft Query adds a qualifier to the WHERE clause of each query, instructing the system to retrieve only rows in organizational entities to which you have been granted access. If you perform a "historical" query—for example, a query asking for the employees in your department as of last year—you may not get the results that you expect. Because the system is enforcing row-level security, PeopleSoft Query returns only those employees who were in the department last year and who are currently in a department to which you have access.

Each PeopleSoft product line comes with a set of views for implementing its standard row-level security options.

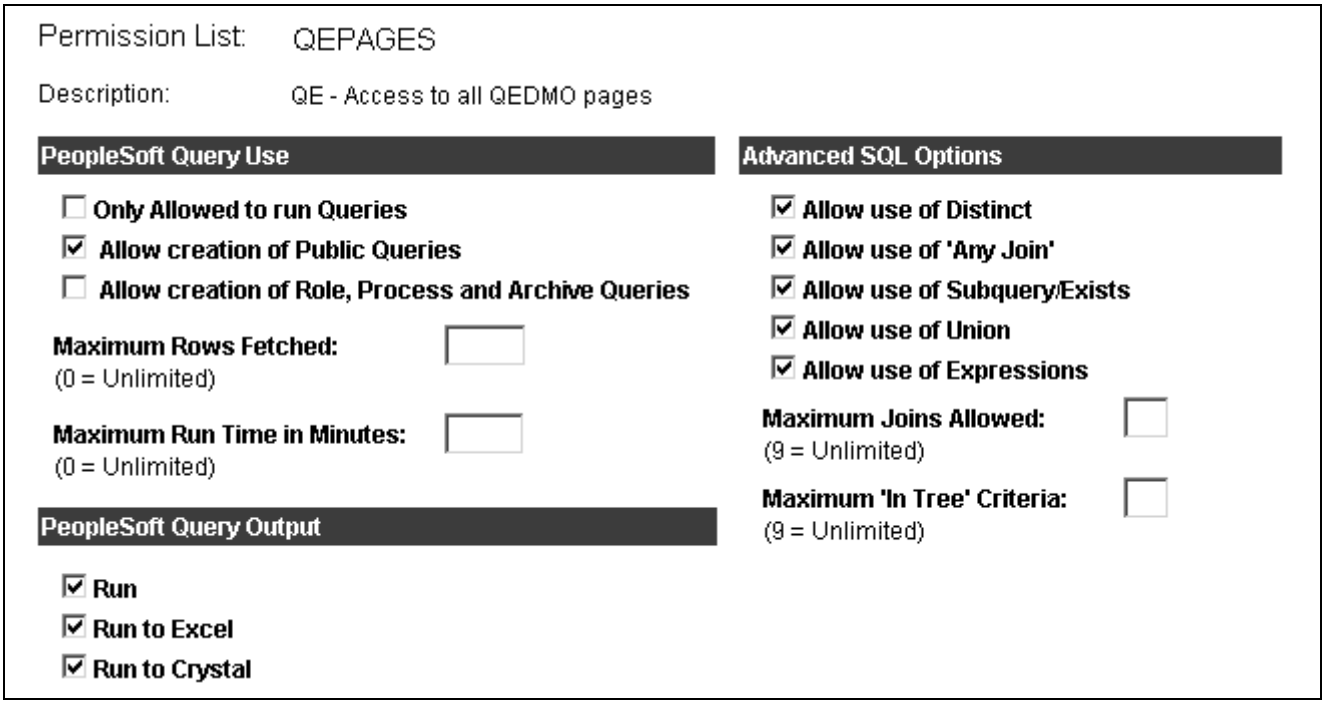
See Also

Your Product Documentation

Using Query Profiles

Use the Query Profile page to specify the type of access you will permit users to have when they work with PeopleSoft Query.

Select PeopleTools, Security, Permissions & Roles, Permission Lists. Select the Query tab. Click the Query Profile link.



Security, query profile page

Query profiles specify the type of access you'll permit users to have when they work with PeopleSoft Query. For example, you may want certain users to run only existing queries, not create new ones. For those you do allow to create new queries, you might want to restrict the types of queries that they can create, limit the number of rows returned, or set the time a query may run before it times out.

Note. If a user has more than one permission list, PeopleSoft Query will use the highest timeout value as defined in the Time-out Minutes section of the user's permission lists.

See *Enterprise PeopleTools 8.45 PeopleBook: Security Administration*, "Setting Up Permission Lists," Setting General Permissions.

Note. All timeouts are globally enabled and disabled in Query Administration.

See Appendix C, "Query Administration," Understanding Query Administration, page 75.

Note. When you select the Allow creation of Role, Process and Archive Queries check box, you also allow the user to create role, process, and archive queries.

You can also determine the output options users have for generating their queries. The first level of security is access to PeopleSoft Query itself. If you don't give users access to PeopleSoft Query when you define their user IDs, they can't create or run queries. Not all users needs to create their own queries.

PeopleSoft tests query profile settings across all of the permission lists to which a user has access. For example, each permission list that is granted to a user/role has the possibility to add in capabilities. However, the Only Allowed to run Queries option is unique because when you select this option, capabilities are removed. So, if what you want to do is remove the ability to update queries (to only run them), then you must ensure that *none* of the permission list settings grant the update capabilities. Do this by clearing the Run Only option.

By default, the query profile gives users access to all PeopleSoft Query features—assuming, of course, that you gave them access to PeopleSoft Query.

See Also

Enterprise PeopleTools 8.45 PeopleBook: Security Administration, “Implementing Query Security”

APPENDIX C

Query Administration

This appendix provides an overview of Query Administration and describes how to use the Query Administration component.

Understanding Query Administration

System administrators can use Query Administration to monitor query performance and usage. Some of the conditions that you can monitor include average runtime, number of times run, and the dates last run. Using a predefined search, you can also select queries to review and report on.

Note. Workflow queries are excluded from the statistics due to the large volume that can be run as part of workflow processing. Therefore, care should be taken to ensure that workflow queries are as efficient as possible.

Query Administration also allows you to cancel queries that are currently running in Query Manager and Query Viewer as well as enable/disable queries and logging.

Note. You cannot cancel currently running scheduled queries.

See Also

Appendix B, "PeopleSoft Query Security," Using Query Profiles, page 72

Using Query Administration

This section discusses how to:

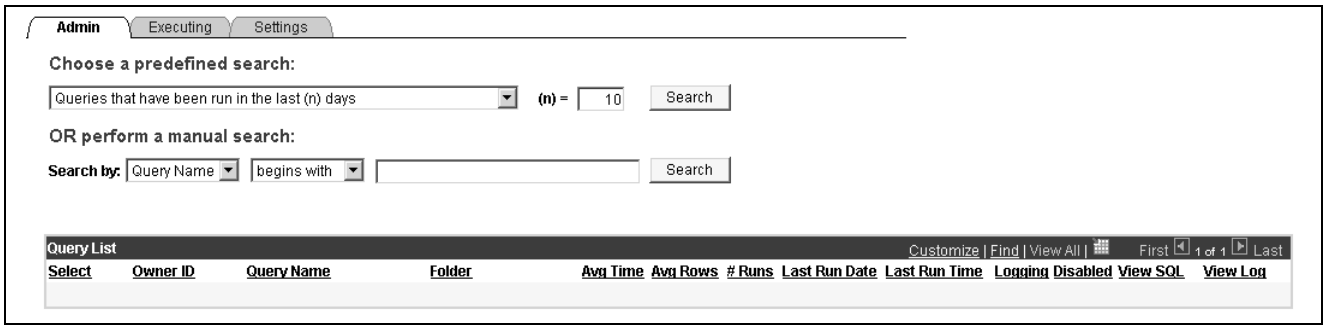
- Administer queries.
- Cancel currently running queries.

Pages Used for Query Administration

Page Name	Object Name	Navigation	Usage
Admin	QRY_ADMIN	PeopleTools, Utilities, Administration, Query Administration, Admin	Administer queries.
Executing	QRY_KILL	PeopleTools, Utilities, Administration, Query Administration, Executing	Enable or disable queries and logging, and cancel currently running queries.
Settings	QRY_SETTINGS	PeopleTools, Utilities, Administration, Query Administration, Settings	Enable or disable the query timeout feature on a systemwide basis. You can also enable or disable the running of query statistics.

Administering Queries

Access the Admin page.



Admin page

To use Query Administration:

1. Use either the predefined search or manual search option to restrict the list of queries that are displayed.

   For a predefined search, select one of the following options:

   - *Queries that belong to locked out accounts.*
   - *Queries that have been disabled.*
   - *Queries that have been run in the last (n) days.*
   - *Queries that have logging turned on.*
   - *Queries that have never been run.*
   - *Queries that have run but not in the last (n) days.*
   - *Top (n) queries by largest average number of rows.*
   - *Top (n) queries by longest run time.*
   - *Top (n) queries most frequently run.*

   In the (n)= field, enter the desired value for the selected search option.

   For a manual search, select to search queries by query name or owner ID.

   You can define your search further by choosing either *begins with* or *contains* search type.

2. Click the Search button to display a list of queries that match your search criteria.

   The Query List group box lists those queries that match your search criteria.

3. Review the following statistics for each query listed:

   - Owner ID.
   - Query name.
   - Folder
   - Average time to run.
   - Average number of rows.
   - Number of times run.
   - Last run date and time.
   - Logging status.
   - Disabled status.

   Note. If a query appears in the list as *<UNTITLED>*, a user has created and run one or more queries without saving them. Results from all unsaved queries appear as a single untitled row. You can only clear statistics for untitled queries. Attempting to perform any other action on untitled queries will result in an error message.

4. For the appropriate query, click the View Log link to view the log for that query.

   A message appears if no logs are available.

5. For the appropriate query, click the View SQL link to view the Structured Query Language (SQL) for that query.

6. Select the check box for each query on which you would like to perform an action. You can also click Check All to select all queries, or click Uncheck All to deselect all queries.

7. Perform an action by clicking one of the following buttons:

   - Logging On: Enables logging for the selected query.

     When you enable the logging feature, detailed statistics will be logged on the query after every time it has run to completion. The statistics are stored in a separate Query Log table.

     Note. The statistics log is updated with data only if the query runs to completion.

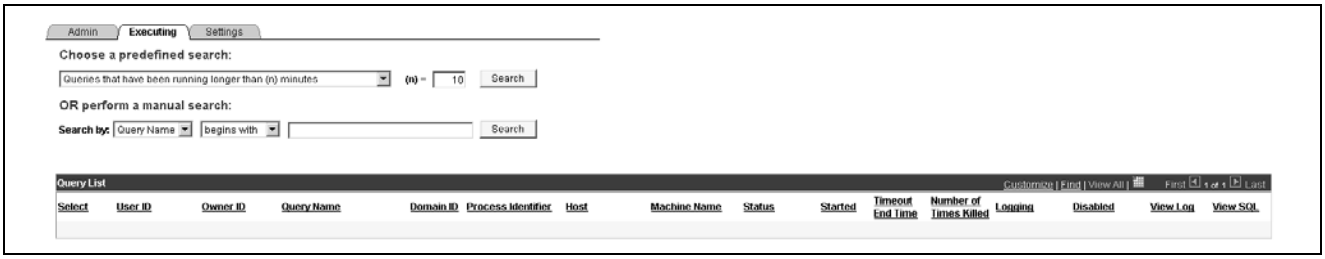
   - Logging Off: Disables logging for the selected query.
   - Enable: Enable the selected query to be run, previewed or scheduled.
   - Disable: Disable the selected query from being run, previewed, or scheduled.
   - Assign New Owner: Assign a new owner to the selected query.
   - Delete: Delete the selected query.
   - Rename: Rename the selected query.
   - Move to Folder: Move the selected query to a folder.
   - Clear Stats/Logs: Delete the statistics and logs for the selected query.

8. For the appropriate query, select the Logging check box to enable logging for that query.

Note. Changes are automatically saved. There is no Save button.

Cancelling Currently Running Queries

Access the Executing page.



Executing page

The Executing page displays all of the currently running queries, allowing you to enable or disable queries, enable or disable logging, and cancel currently running queries. If an administrator needs to verify that a query has been cancelled, they can look in the Appsrv.log and verify that the *PSMONITORSRV* service has cancelled the selected query.

To cancel currently running queries:

1. Use either the predefined search or manual search option to restrict the list of queries that are displayed.

   For a predefined search, select one of the following options:

   - *Queries that have been running longer than (n) minutes.*
   - *Top (n) queries by longest run time.*

2. In the (n)= field, enter desired value for the search option.

   For a manual search, select to search queries by query name or owner ID.

   You can define your search further by choosing either the *begins with* or *contains* search type.

3. Click the Search button to display a list of queries that match your search criteria.

   The Query List group box lists those queries that match your search criteria.

4. Review the following statistics for each query listed:

   - User ID.
   - Owner ID.
   - Query name.
   - Domain ID.
   - Process identifier.
   - Host
   - Machine name.
   - Status
   - Time started.
   - Timeout end time.
   - Number of times killed.

- Logging status.
- Disabled status.

5. For the appropriate query, click the View Log link to view the log for that query.

   A message appears if no logs are available.

6. For the appropriate query, click the View SQL link to view the Structured Query Language (SQL) for that query.
7. Select the check box for each query on which you would like to perform an action. You can also click Check All to select all queries, or click Uncheck All to deselect all queries.
8. Perform an action by clicking one of the following buttons:
   - Kill Selected Processes: Forces the selected query to stop running.
   - Logging On: Enables logging for the selected query.

     When you enabling logging, detailed statistics will be logged on the query after every time it has run to completion. The statistics are stored in a separate Query Log table.
   - Logging Off: Disables logging for the selected query.
   - Enable: Enable the selected query to be run, previewed or scheduled.
   - Disable: Disable the selected query from being run, previewed, or scheduled.
9. For the appropriate query, select the Logging check box to enable logging for that query.

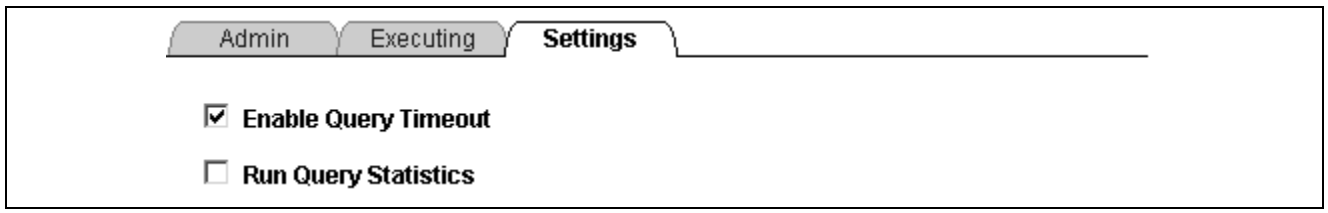
Note. Changes are automatically saved. There is no Save button.

The kill (cancel) query/timeout mechanism represents each query that is run from Query Manager or Query Viewer as a row in the table PSQRYTRANS. Query Monitor, which implements the kill query/timeout functionality, has a mechanism that looks for orphan rows in PSQRYTRANS. Orphan rows are rows in PSQRYTRANS that do not have a query actively running. Orphan rows can be created because the server crashed while running a query, or other reasons.

Query monitor will only look for orphan rows for the appserver domain that it is running in, therefore there could potentially be orphan rows that are in PSQRYTRANS when there is not an active domain. These rows are not seen by the online query monitoring facility, but could potentially exist in the database. These rows will only exist under the most exceptional conditions. You may use the database query tool to clean these rows up. You can use the *machine* and *domain* fields to determine if there are rows which should be cleaned up.

Setting Additional Options

Access the Settings page.



Settings page

Enable Query Timeout Select or clear to enable or disable the query timeout feature on a systemwide basis. The timeout values are stored in each permission list.

Note. The query timeout feature applies to queries that are run in Query Manager and Query Viewer. This feature does not apply to scheduled queries.

Run Query Statistics Select or clear to enable or disable the query statistics feature on a systemwide basis.

Note. By default, the query statistics feature is *disabled.*

PeopleSoft recommends that you only use the query statistics feature for the purposes of analysis. Do not leave the query statistics feature enabled on an ongoing basis. When this feature is enabled, you may compromise the performance and the system may have an increased possibility of query timeouts or may return query results with zero values. PeopleSoft also offers this recommendation to users of queries in reports.

APPENDIX D

ISO Country and Currency Codes

PeopleBooks use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

This appendix discusses:

- ISO country codes.
- ISO currency codes.

See Also

"About These PeopleBooks Preface," Typographical Conventions and Visual Cues

ISO Country Codes

This table lists the ISO country codes that may appear as country identifiers in PeopleBooks:

ISO Country Code	Country Name
ABW	Aruba
AFG	Afghanistan
AGO	Angola
AIA	Anguilla
ALB	Albania
AND	Andorra
ANT	Netherlands Antilles
ARE	United Arab Emirates
ARG	Argentina
ARM	Armenia
ASM	American Samoa
ATA	Antarctica

ISO Country Code	Country Name
ATF	French Southern Territories
ATG	Antigua and Barbuda
AUS	Australia
AUT	Austria
AZE	Azerbaijan
BDI	Burundi
BEL	Belgium
BEN	Benin
BFA	Burkina Faso
BGD	Bangladesh
BGR	Bulgaria
BHR	Bahrain
BHS	Bahamas
BIH	Bosnia and Herzegovina
BLR	Belarus
BLZ	Belize
BMU	Bermuda
BOL	Bolivia
BRA	Brazil
BRB	Barbados
BRN	Brunei Darussalam
BTN	Bhutan
BVT	Bouvet Island
BWA	Botswana
CAF	Central African Republic
CAN	Canada
CCK	Cocos (Keeling) Islands

ISO Country Code	Country Name
CHE	Switzerland
CHL	Chile
CHN	China
CIV	Cote D'Ivoire
CMR	Cameroon
COD	Congo, The Democratic Republic
COG	Congo
COK	Cook Islands
COL	Colombia
COM	Comoros
CPV	Cape Verde
CRI	Costa Rica
CUB	Cuba
CXR	Christmas Island
CYM	Cayman Islands
CYP	Cyprus
CZE	Czech Republic
DEU	Germany
DJI	Djibouti
DMA	Dominica
DNK	Denmark
DOM	Dominican Republic
DZA	Algeria
ECU	Ecuador
EGY	Egypt
ERI	Eritrea
ESH	Western Sahara

ISO Country Code	Country Name
ESP	Spain
EST	Estonia
ETH	Ethiopia
FIN	Finland
FJI	Fiji
FLK	Falkland Islands (Malvinas)
FRA	France
FRO	Faroe Islands
FSM	Micronesia, Federated States
GAB	Gabon
GBR	United Kingdom
GEO	Georgia
GHA	Ghana
GIB	Gibraltar
GIN	Guinea
GLP	Guadeloupe
GMB	Gambia
GNB	Guinea-Bissau
GNQ	Equatorial Guinea
GRC	Greece
GRD	Grenada
GRL	Greenland
GTM	Guatemala
GUF	French Guiana
GUM	Guam
GUY	Guyana
GXA	GXA - GP Core Country

ISO Country Code	Country Name
GXB	GXB - GP Core Country
GXC	GXC - GP Core Country
GXD	GXD - GP Core Country
HKG	Hong Kong
HMD	Heard and McDonald Islands
HND	Honduras
HRV	Croatia
HTI	Haiti
HUN	Hungary
IDN	Indonesia
IND	India
IOT	British Indian Ocean Territory
IRL	Ireland
IRN	Iran (Islamic Republic Of)
IRQ	Iraq
ISL	Iceland
ISR	Israel
ITA	Italy
JAM	Jamaica
JOR	Jordan
JPN	Japan
KAZ	Kazakstan
KEN	Kenya
KGZ	Kyrgyzstan
KHM	Cambodia
KIR	Kiribati
KNA	Saint Kitts and Nevis

ISO Country Code	Country Name
KOR	Korea, Republic of
KWT	Kuwait
LAO	Lao People’s Democratic Rep
LBN	Lebanon
LBR	Liberia
LBY	Libyan Arab Jamahiriya
LCA	Saint Lucia
LIE	Liechtenstein
LKA	Sri Lanka
LSO	Lesotho
LTU	Lithuania
LUX	Luxembourg
LVA	Latvia
MAC	Macao
MAR	Morocco
MCO	Monaco
MDA	Moldova, Republic of
MDG	Madagascar
MDV	Maldives
MEX	Mexico
MHL	Marshall Islands
MKD	Fmr Yugoslav Rep of Macedonia
MLI	Mali
MLT	Malta
MMR	Myanmar
MNG	Mongolia
MNP	Northern Mariana Islands

ISO Country Code	Country Name
MOZ	Mozambique
MRT	Mauritania
MSR	Montserrat
MTQ	Martinique
MUS	Mauritius
MWI	Malawi
MYS	Malaysia
MYT	Mayotte
NAM	Namibia
NCL	New Caledonia
NER	Niger
NFK	Norfolk Island
NGA	Nigeria
NIC	Nicaragua
NIU	Niue
NLD	Netherlands
NOR	Norway
NPL	Nepal
NRU	Nauru
NZL	New Zealand
OMN	Oman
PAK	Pakistan
PAN	Panama
PCN	Pitcairn
PER	Peru
PHL	Philippines
PLW	Palau

ISO Country Code	Country Name
PNG	Papua New Guinea
POL	Poland
PRI	Puerto Rico
PRK	Korea, Democratic People's Rep
PRT	Portugal
PRY	Paraguay
PSE	Palestinian Territory, Occupie
PYF	French Polynesia
QAT	Qatar
REU	Reunion
ROU	Romania
RUS	Russian Federation
RWA	Rwanda
SAU	Saudi Arabia
SDN	Sudan
SEN	Senegal
SGP	Singapore
SGS	Sth Georgia & Sth Sandwich Is
SHN	Saint Helena
SJM	Svalbard and Jan Mayen
SLB	Solomon Islands
SLE	Sierra Leone
SLV	El Salvador
SMR	San Marino
SOM	Somalia
SPM	Saint Pierre and Miquelon
STP	Sao Tome and Principe

ISO Country Code	Country Name
SUR	Suriname
SVK	Slovakia
SVN	Slovenia
SWE	Sweden
SWZ	Swaziland
SYC	Seychelles
SYR	Syrian Arab Republic
TCA	Turks and Caicos Islands
TCD	Chad
TGO	Togo
THA	Thailand
TJK	Tajikistan
TKL	Tokelau
TKM	Turkmenistan
TLS	East Timor
TON	Tonga
TTO	Trinidad and Tobago
TUN	Tunisia
TUR	Turkey
TUV	Tuvalu
TWN	Taiwan, Province of China
TZA	Tanzania, United Republic of
UGA	Uganda
UKR	Ukraine
UMI	US Minor Outlying Islands
URY	Uruguay
USA	United States

ISO Country Code	Country Name
UZB	Uzbekistan
VAT	Holy See (Vatican City State)
VCT	St Vincent and the Grenadines
VEN	Venezuela
VGB	Virgin Islands (British)
VIR	Virgin Islands (U.S.)
VNM	Viet Nam
VUT	Vanuatu
WLF	Wallis and Futuna Islands
WSM	Samoa
YEM	Yemen
YUG	Yugoslavia
ZAF	South Africa
ZMB	Zambia
ZWE	Zimbabwe

ISO Currency Codes

This table lists the ISO country codes that may appear as currency identifiers in PeopleBooks:

ISO Currency Code	Description
ADP	Andorran Peseta
AED	United Arab Emirates Dirham
AFA	Afghani
AFN	Afghani
ALK	Old Lek
ALL	Lek
AMD	Armenian Dram

ISO Currency Code	Description
ANG	Netherlands Antilles Guilder
AOA	Kwanza
AOK	Kwanza
AON	New Kwanza
AOR	Kwanza Reajustado
ARA	Austral
ARP	Peso Argentino
ARS	Argentine Peso
ARY	Peso
ATS	Schilling
AUD	Australian Dollar
AWG	Aruban Guilder
AZM	Azerbaijanian Manat
BAD	Dinar
BAM	Convertible Marks
BBD	Barbados Dollar
BDT	Taka
BEC	Convertible Franc
BEF	Belgian Franc
BEL	Financial Belgian Franc
BGJ	Lev A/52
BGK	Lev A/62
BGL	Lev
BGN	Bulgarian LEV
BHD	Bahraini Dinar
BIF	Burundi Franc
BMD	Bermudian Dollar

ISO Currency Code	Description
BND	Brunei Dollar
BOB	Boliviano
BOP	Peso
BOV	Mvdol
BRB	Cruzeiro
BRC	Cruzado
BRE	Cruzeiro
BRL	Brazilian Real
BRN	New Cruzado
BRR	Brazilian Real Dollar
BSD	Bahamian Dollar
BTN	Ngultrum
BUK	N/A
BWP	Pula
BYB	Belarussian Ruble
BYR	Belarussian Ruble
BZD	Belize Dollar
CAD	Canadian Dollar
CDF	Franc Congolais
CHF	Swiss Franc
CLF	Unidades de fomento
CLP	Chilean Peso
CNX	Peoples Bank Dollar
CNY	Yuan Renminbi
COP	Colombian Peso
CRC	Costa Rican Colon
CSD	Serbia Dinar

ISO Currency Code	Description
CSJ	Krona A/53
CSK	Koruna
CUP	Cuban Peso
CVE	Cape Verde Escudo
CYP	Cyprus Pound
CZK	Czech Koruna
DEM	Deutsche Mark
DJF	Djibouti Franc
DKK	Danish Krone
DOP	Dominican Peso
DZD	Algerian Dinar
ECS	Sucre
ECV	Unidad de Valor
EEK	Kroon
EGP	Egyptian Pound
EQE	Ekwele
ERN	Nakfa
ESA	Spanish Peseta
ESB	Convertible Peseta
ESP	Spanish Peseta
ETB	Ethiopian Birr
EUR	euro
FIM	Markka
FJD	Fiji Dollar
FKP	Falklands Isl. Pound
FRF	French Franc
GBP	Pound Sterling

ISO Currency Code	Description
GEK	Georgian Coupon
GEL	Lari
GHC	Cedi
GIP	Gibraltar Pound
GMD	Dalasi
GNE	Syli
GNF	Guinea Franc
GNS	Syli
GQE	Ekwele
GRD	Drachma
GTQ	Quetzal
GWE	Guinea Escudo
GWP	Guinea-Bissau Peso
GYD	Guyana Dollar
HKD	Hong Kong Dollar
HNL	Lempira
HRD	Dinar
HRK	Kuna
HTG	Gourde
HUF	Forint
IDR	Rupiah
IEP	Irish Pound
ILP	Pound
ILR	Old Shekel
ILS	New Israeli Sheqel
INR	Indian Rupee
IQD	Iraqi Dinar

ISO Currency Code	Description
IRR	Iranian Rial
ISJ	Old Krona
ISK	Iceland Krona
ITL	Italian Lira
JMD	Jamaican Dollar
JOD	Jordanian Dinar
JPY	Yen
KES	Kenyan Shilling
KGS	Som
KHR	Riel
KMF	Comoro Franc
KPW	North Korean Won
KRW	Won
KWD	Kuwaiti Dinar
KYD	Cayman Islands dollar
KZT	Tenge
LAJ	Kip Pot Pol
LAK	Kip
LBP	Lebanese Pound
LKR	Sri Lanka Rupee
LRD	Liberian Dollar
LSL	Loti
LSM	Maloti
LTL	Lithuanian Litas
LTT	Talonas
LUC	Convertib Francl
LUF	Luxembourg Franc

ISO Currency Code	Description
LUL	Financial Franc
LVL	Latvian Lats
LVR	Latvian Ruble
LYD	Libyan Dinar
MAD	Moroccan Dirham
MAF	Mali Franc
MDL	Moldovan Leu
MGF	Malagasy Franc
MKD	Denar
MLF	Mali Franc
MMK	Kyat
MNT	Tugrik
MOP	Pataca
MRO	Ouguiya
MTL	Maltese Lira
MTP	Maltese Pound
MUR	Mauritius Rupee
MVQ	Maldive Rupee
MVR	Rufiyaa
MWK	Malawian Kwacha
MXN	Mexican Peso
MXP	Mexican Peso
MXV	Mexican UDI
MYR	Malaysian Ringgit
MZE	Mozambique Escudo
MZM	Metical
NAD	Namibia Dollar

ISO Currency Code	Description
NGN	Naira
NIC	Cordoba
NIO	Cordoba Oro
NLG	Netherlands Guilder
NOK	Norwegian Krone
NPR	Nepalese Rupee
NZD	New Zealand Dollar
OMR	Rial Omani
PAB	Balboa
PEI	Inti
PEN	Nuevo Sol
PES	Sol
PGK	Kina
PHP	Philippine Peso
PKR	Pakistan Rupee
PLN	Zloty
PLZ	Zloty
PTE	Portuguese Escudo
PYG	Guarani
QAR	Qatari Rial
ROK	Leu A/52
ROL	Leu
RUB	Russian Ruble
RUR	Russian Federation Rouble
RWF	Rwanda Franc
SAR	Saudi Riyal
SBD	Solomon Islands

ISO Currency Code	Description
SCR	Seychelles Rupee
SDD	Sudanese Dinar
SDP	Sudanese Pound
SEK	Swedish Krona
SGD	Singapore Dollar
SHP	St Helena Pound
SIT	Tolar
SKK	Slovak Koruna
SLL	Leone
SOS	Somali Shilling
SRG	Surinam Guilder
STD	Dobra
SUR	Rouble
SVC	El Salvador Colon
SYP	Syrian Pound
SZL	Lilangeni
THB	Baht
TJR	Tajik Ruble
TJS	Somoni
TMM	Manat
TND	Tunisian Dinar
TOP	Pa’anga
TPE	Timor Escudo
TRL	Turkish Lira
TTD	Trinidad Dollar
TWD	New Taiwan Dollar
TZS	Tanzanian Shilling

ISO Currency Code	Description
UAH	Hryvnia
UAK	Karbovanet
UGS	Uganda Shilling
UGW	Old Shilling
UGX	Uganda Shilling
USD	US Dollar
USN	US Dollar (Next day)
USS	US Dollar (Same day)
UYN	Old Uruguay Peso
UYP	Uruguayan Peso
UYU	Peso Uruguayo
UZS	Uzbekistan Sum
VEB	Bolivar
VNC	Old Dong
VND	Dong
VUV	Vatu
WST	Tala
XAF	CFA Franc BEAC
XAG	Silver
XAU	GOLD
XBA	European Composite Unit
XBB	European Monetary Unit
XBC	European Unit of Account 9
XBD	European Unit of Account 17
XCD	East Caribbean Dollar
XDR	SDR
XEU	EU Currency (E.C.U)

ISO Currency Code	Description
XFO	Gold-Franc
XFU	UIC-Franc
XOF	CFA Franc BCEAO
XPD	Palladium
XPF	CFP Franc
XPT	Platinum
XTS	For Testing Purposes
XXX	Non Currency Transaction
YDD	Yemeni Din
YER	Yemeni Rial
YUD	New Yugoslavian Dinar
YUM	New Dinar
YUN	Yugoslavian Dinar
ZAL	Financial Rand
ZAR	Rand
ZMK	Zambian Kwacha
ZRN	New Zaire
ZRZ	Zaire
ZWC	Rhodesian Dollar
ZWD	Zimbabwe Dollar

Glossary of PeopleSoft Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

accounting class In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

agreement In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

allocation rule In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

AR specialist Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.

arbitration plan In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

assessment rule In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.

asset class An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attribute/value pair In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

authentication server A server that is set up to verify users of the system.

base time period In PeopleSoft Business Planning, the lowest level time period in a calendar.

benchmark job In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

book In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

branch A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

budgetary account only An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."

budget check In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business event In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, “Introduction to Microsoft Word.” A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company’s catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*
clone	In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

condition In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

content reference Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.

control table Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

cost profile A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

cost row A cost transaction and amount for a set of ChartFields.

current learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

data acquisition In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

data elements Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

dataset A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

directory information tree In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.

event propagation process In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

	Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained. In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
KPI	An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

learner group In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

ledger mapping You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

linked section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

load In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new

	laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
match group	In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also *compensation object.*
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.

PeopleCode event An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.

PeopleSoft Internet Architecture The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.

performance measurement In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.

period context In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

plan In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

plan template In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.

planned learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.

planning instance In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

portal registry In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.

price list In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.

price rule In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.

price rule key In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

process category In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

process group In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

process definition Process definitions define each run request.

process instance A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

process job You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

process request A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

record group A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag Abbreviation for *record input value-added tax flag*. Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT

	on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for *record output value-added tax flag*. See *record input VAT flag*.
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

search query You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

section In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

serial genealogy In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

session In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

single signon With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

source transaction In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

template A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

TimeSpan A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather

	than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

worksheet A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

worklist The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

XML schema An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

yield by operation In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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