
Enterprise PeopleTools 8.49

PeopleBook: PeopleSoft Query

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Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Query
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About This PeopleBook

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

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only elements, such as fields and check boxes, that require additional explanation. If an 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 Enterprise applications are defined in this preface.

PeopleSoft Enterprise 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 Enterprise applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, or windows. 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 Enterprise applications most effectively.

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. 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 the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

Obtaining Documentation Updates

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

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

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, <http://www.oracle.com/technology/documentation/psftent.html>.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
PeopleBooks support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

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, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft Enterprise 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 <i>O</i> .
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 Enterprise 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.

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.

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 Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@us.oracle.com.

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

Common Elements Used in 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.
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
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).
Request ID	An ID that represents a set of selection criteria for a report or process.
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.
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.
User ID	An ID that represents the person who generates a transaction.

PeopleSoft Query Preface

This book discusses PeopleSoft Query, a tool that you use to retrieve selected data from the database.

PeopleSoft Query

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

To take full advantage of the information covered in this book, you should be comfortable using Microsoft Windows and should have a basic familiarity with relational database concepts and SQL. In addition, this book assumes that you have a basic understanding of how to use PeopleSoft applications and are familiar with PeopleTools.

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 are 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).

You can 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 clicking the HTML link from Query Manager or Query Viewer.

Note. Query Viewer is a read-only version of Query Manager. See chapter Creating and Running Simple Queries, section Using Query Viewer for additional details.

- To schedule a query.

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

- To download query results to a Microsoft Excel spreadsheet.

You can 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 9. If you do not have the Windows client installed, you can schedule a predefined Crystal Report to run on a Process Scheduler server, and have the results routed to PeopleSoft Report Manager.

See *Enterprise PeopleTools 8.49 PeopleBook: Crystal Reports for PeopleSoft*, “Using Crystal Reports 9,” Launching Crystal Reports 9 with Microsoft Windows-based PeopleSoft Query.

See *Enterprise PeopleTools 8.49 PeopleBook: Crystal Reports for PeopleSoft*, “Using Crystal Reports 9”.

- To determine to whom to forward information.

You can 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 8.49 PeopleBook: Workflow Technology*, “Understanding PeopleSoft Workflow”.

- To create a data source for PeopleSoft nVision reports.

PeopleSoft nVision can use queries as a data source.

See *Enterprise PeopleTools 8.49 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 8.49 PeopleBook: PeopleSoft Cube Manager*, “Introducing PeopleSoft Cube Manager”.

- To serve as a data source of the same name for PeopleSoft XML Publisher.

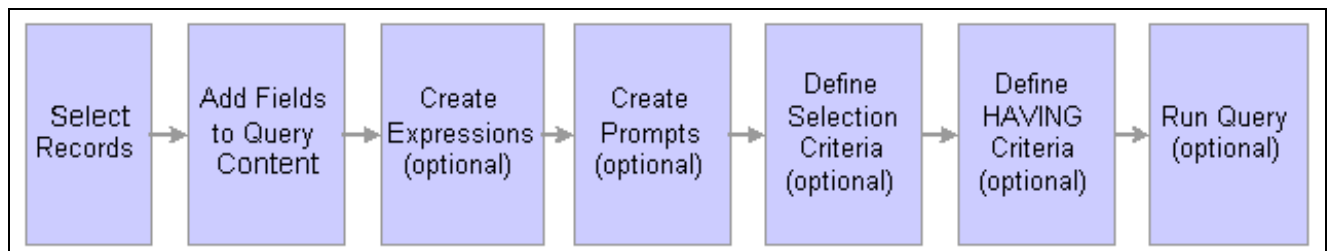
With XML Publisher, you can apply advanced formatting to the output of your queries and streamline report and form generation.

Queries that are used as data sources for XML Publisher need to be run through Reporting Tools, XML Publisher to see XML Publisher-related formatting.

See *Enterprise PeopleTools 8.49 PeopleBook: XML Publisher for PeopleSoft Enterprise*, “Getting Started with XML Publisher”.

PeopleSoft Query Business Processes

This 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 set up query security:

Step	Reference
1. Define query profiles.	See <i>Enterprise PeopleTools 8.49 PeopleBook: Security Administration</i> , “Implementing Query Security,” Defining Query Profiles.
2. Build query access group trees.	See <i>Enterprise PeopleTools 8.49 PeopleBook: Security Administration</i> , “Implementing Query Security,” Building Query Access Group Trees.
3. Work with query trees.	See <i>Enterprise PeopleTools 8.49 PeopleBook: Security Administration</i> , “Implementing Query Security,” Working with Query Trees.
4. Define row-level security and query security records.	See <i>Enterprise PeopleTools 8.49 PeopleBook: Security Administration</i> , “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 this chapter, 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 xvii

Enterprise PeopleTools 8.49 PeopleBook: Getting Started with PeopleTools

CHAPTER 2

Creating and Running Simple Queries

This chapter provides an overview of query types, and discusses how to:

- 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, Cube Manager, or XML Publisher.

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 page 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 8.49 PeopleBook: PeopleSoft Process Scheduler*, “Defining PeopleSoft Process Scheduler Support Information,” Adding New Process Definitions.

See [Chapter 3, “Defining Selection Criteria,” page 29](#).

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. 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 select in your query is ROLEUSER. Of course, you 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. Note that Workflow queries also override the row-level security logic.

See *Enterprise PeopleTools 8.49 PeopleBook: Workflow Technology*, “Understanding PeopleSoft Workflow”.

Archive query

You can save a query as an archive query if you have access to workflow queries that include *Archive Query*, *Role Query*, and *Process Query*. These queries are generally only used by the PeopleSoft Data Archive Manager.

See *Enterprise PeopleTools 8.49 PeopleBook: Data Management*, “Using PeopleSoft Data Archive Manager”.

Note. You can only create and save archive queries 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 63](#).

See *Enterprise PeopleTools 8.49 PeopleBook: PS/nVision*, “Using Layouts,” Understanding Layouts.

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 row.

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 /Add Criteria button to open the Edit Criteria Properties page, where you can determine how this field will be used as a criterion for the current query.



From the Query tab, click the Folder button to view the fields for the chosen record, if they are not already displayed. 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.

Dirty Reads in PeopleSoft Query

Dirty Reads mode—also called Read Only mode—enables you to configure your servers to avoid table locking while running PeopleSoft queries. When Dirty Read mode is enabled for PeopleSoft Query, the performance is increased as queries do not lock on other INSERT and UPDATE operations.

Dirty Read mode is set in configuration files for PeopleSoft Application server and PeopleSoft Process Scheduler server:

- In PeopleSoft Application server, under section [PSQRYSRV], the setting ‘Use dirty-read’ controls behavior for PSAPPSRV, PSQCKSRV, and PSQRYSRV.
- In PeopleSoft Process Scheduler server, under section [PSAESRV], the setting ‘scheduledquery-dirtyread’ controls behavior for scheduled query process executing under PSAESRV process.

See Also

Enterprise PeopleTools 8.49 PeopleBook: System and Server Administration, “Setting Application Server Domain Parameters,” Use Dirty-Read

Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler, “Managing PeopleSoft Process Scheduler,” Setting Parameters for the Application Engine Server

Creating New Queries

This section describes how to:

- Select records.
- Add fields to query content.
- View fields selected for output.
- Change the column order for multiple fields.
- Change the sort order for multiple fields.
- Edit field properties.
- View and edit query properties.
- View underlying SQL code.
- Preview query results prior to saving.

Pages Used to Create a Query

Page Name	Object Name	Navigation	Usage
Query Preferences	QRY_PREFERENCES	Reporting Tools, Query, Query Manager. Click the Preferences link on any page of the Query Manager component except the Run page.	Specify query preferences.
Records	QRY_RECORDS	Reporting Tools, Query, Query Manager. Click the Create New Query link. Click the Search button to find an existing record.	Select the records upon which to base the new query.
Query	QRY_QUERY	Reporting Tools, Query, Query Manager. Click the Create New Query link. Click the Search button to find an existing Record. Click the Add Record link for the desired record.	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, a page informs you that an effective date criteria has been automatically added for this record. Click OK to close the page.
Fields	QRY_FIELDS	Reporting Tools, Query, Query Manager. Click the Create New Query link. Click the Search button to find an existing Record. Click the Add Record link for the desired record. Select the desired fields. Click the Fields tab.	View how fields are selected for output; view the properties of each field; and change headings, order-by numbers, and aggregate values.
Edit Field Ordering	QRY_FIELDS_ORDER	From the Fields page, click the Reorder/Sort button.	Use to change the column and sort order for multiple fields.
Edit Field Properties	QRY_FIELDS_SEC	From the Fields page, click the Edit button to the right of the desired field.	Use to format the query output; for example, to change column headings or display translate table values in place of codes.

Page Name	Object Name	Navigation	Usage
Query Properties	QRY_PROPERTIES	Click the Properties link at the bottom of the page (this link appears on all pages but the Run page).	View and edit data about the current query, 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.
View SQL	QRY_SQL	With a query open, select the View SQL tab.	View the underlying SQL code that Query Manager generates based on your query definition. You cannot modify SQL on this page.
Run	QUERY_VIEWER	With a query open, select the Run tab.	View the results of your query prior to saving in order to verify that your query yields the results that you need. Continue to adjust and preview your query as necessary.

Specifying Query Preferences

Access the Query Preferences page.

Query Preferences

*Name Style: Name and Description

☒ **Enable Auto Join**
(Query will automatically determine the join conditions for you when a new record component is added)

☒ **Enable Auto Preview**

OK Cancel

Query Preferences page

Name Style

Specify how record and field names are displayed. Select one of the following:

- *Description only*
- *Name and Description*

This is used mostly for global users where the record and field names are in English but the descriptions are in another language.

Enable Auto Join

Select to indicate that your query should automatically determine the join conditions when a new record component is added.

Enable Auto Preview

Select to indicate that your query preview should automatically rerun each time you access the Run page of the Query Manager component.

This option is selected by default.

See Also

[Chapter 2, “Creating and Running Simple Queries,” Selecting Records, page 11](#)

[Chapter 2, “Creating and Running Simple Queries,” Adding Fields to Query Content, page 12](#)

[Chapter 2, “Creating and Running Simple Queries,” Previewing Query Results Prior to Saving, page 19](#)

Enterprise PeopleTools 8.49 PeopleBook: Security Administration, “Managing PeopleSoft Personalizations,” Understanding Internally Controlled Options

Selecting Records

Access the Records page.

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Query Name: New Unsaved Query Description:

Find an Existing Record

*Search By: Record Name begins with

Search Advanced Search

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

Record	Recname	Add Record	Show Fields
ACCESS_GRP_TBL	Tree Access Groups	Add Record	Show Fields
AEINSTANCENBR	Temporary Instance Numbers	Add Record	Show Fields
AELOCKMGR	Application Engine Lock	Add Record	Show Fields
AEONLINEINST	Application Engine Online Inst	Add Record	Show Fields
AEREQUESTPARM	AE Request Parameters	Add Record	Show Fields
AEREQUESTTBL	AE Request Table	Add Record	Show Fields
AERUNCONTROL	AE Run Control Table	Add Record	Show Fields
AERUNCONTROLPC	Checkpoint tbl for PC globals	Add Record	Show Fields

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 select a record:

1. Find the record upon which to base the query.
 - If you know the entire record name, description, access group name, or field name included in the record, select the appropriate item in the Search By drop-down list box. Enter the name in the field (or click the Look Up button if searching by access group name). Then click the Search button to display a list of records that match your search criteria.

- You can perform a partial search by entering part of the name in the Search By field.

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

- You can 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, and then entering an appropriate search string in the fields that correspond to your selections. For access group name, select a condition, click the Lookup Name button, and then select the access group name from the list of access group trees that appears.
- 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 in question.

A page displays the record's fields. You can use this information to verify whether you want to base the query upon this record.

3. Click Return when you have finished looking at the fields.
4. Click Add Record next to the record you want to add to the query.

This takes you to the Query field, from which you can select which fields from the selected record to add to the query.

Note. In most cases, you 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 68

Adding Fields to Query Content

Access the Query page.

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

Query Name: New Unsaved Query **Description:**

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.

Chosen Records

Alias Record

A AE_APPL_TBL - Application Definitions [Hierarchy Join](#)

Check All **Uncheck All**

Fields Find | View All First 1-25 of 25 Last

☐	AE_PRODUCT - Product	+
☐	AE_APPL_ID - Application	+
☐	AE_VERSION - Version	+
☐	DESCR - Description	+
☐	AE_DATE_OVERRIDE - Override Current Date	+
☐	ASOF_DT - As Of Date	+
☐	LAST_DTTM_UPDATE - Last Change Date	+
☐	OPRID - User ID	+
☐	AE_CACHE_RECNAME - Cache Record	+
☐	AE_SYMBOLICS_PROG - Symbolics Handler	+
☐	AE_FILTER_PROG_1 - Filter 1	+

[Join AE_CACHE_REC_VW](#)
[View of AE Cache Records](#)

Query page

To add fields to your query:

1. Select the fields to add to the query either by clicking their check boxes or by clicking the Check All Fields button.
2. When you have selected the desired fields, select the Fields tab.



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. After 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.

Fields

Select the check box to the left of each field that you want to add to your query content.

Related Record Join

Click such links 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 5, “Working with Advanced Query Options,” Joining Records, page 67

Viewing Fields Selected for Output

Access the Fields page.

Query Name: New Unsaved Query **Description:**

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

Col	Record	Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.AE_PRODUCT -	Product	Char2		N		Product		Edit	[-]
2	A.AE_APPL_ID -	Application	Char8				Appl ID		Edit	[-]
3	A.AE_VERSION -	Version	Num4.2				Version		Edit	[-]
4	A.ASOF_DT -	As Of Date	Date				As Of		Edit	[-]
5	A.OPRID -	User ID	Char30				User		Edit	[-]
6	A.AE_CACHE_RECNAME -	Cache Record	Char15				Cache		Edit	[-]
7	A.AE_FILTER_PROG_1 -	Filter 1	Char8				Filter 1		Edit	[-]

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

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.

You can also specify a descending sort order. The letter *D* appears if you are sorting fields in descending order.

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 them. 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, 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 display the Edit Field Properties page.

See [Chapter 2, "Creating and Running Simple Queries," Viewing and Editing Query Properties, page 18](#).

Reorder/Sort

Click this button to display the Edit Field Ordering page, which enables you to change the column order and/or sort order for multiple fields.

Changing the Column and Sort Order for Multiple Fields

Access the Edit Field Ordering page.

Edit Field Ordering

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

Edit Field Ordering				
Customize Find View All First 1-7 of 7 Last				
New Column	Column	Record.Fieldname	Order By Descending	New Order By
	1	A.AE_PRODUCT - Product	☐	
	2	A.AE_APPL_ID - Application	☐	
	3	A.AE_VERSION - Version	☐	
	4	A.ASOF_DT - As Of Date	☐	
	5	A.OPRID - User ID	☐	
	6	A.AE_CACHE_RECNAME - Cache Record	☐	
	7	A.AE_FILTER_PROG_1 - Filter 1	☐	

OK Cancel

Edit Field Ordering page

New Column

Enter the new column number to reorder the columns. Columns that are left blank or assigned a zero are automatically assigned a number.

Order By

Current sort order.

Descending

Select this check box to sort fields in descending order.

New Order By

Enter the new sort order number to change the 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 designate the second sort field, enter 2, and so on.

Editing Field Properties

Access the Edit Field Properties page.

Edit Field Properties

Field Name: A.AE_APPL_ID - Application

Heading

☐ No Heading
 ☒ RFT Short
☐ Text
 ☐ RFT Long

Heading Text:

***Unique Field Name:**

Aggregate

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

OK Cancel

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 page, the columns reorder.
Heading	Choose a column heading from the following: <i>No Heading:</i> The column does not have a heading. <i>Text:</i> The column heading is the text that you have entered in the text box. <i>RFT Short:</i> The column heading is the short name from the record definition. <i>RFT Long:</i> 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 by the record field name (for example A.NAME or B.EMPLID).
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 63

Viewing and Editing Query Properties

Access the Query Properties page.

Query Properties

*Query: AE_PRODUCT

Description: AE Product Info

Folder:

*Query Type: User

*Owner: Public ☐ Distinct

Query Definition:

Last Updated Date/Time: 01/29/2007 4:59:38PM

Last Update User ID: QEDMO

OK Cancel

Query Properties page

Query	Use this field to edit the name of the Query.
Description	Edit the description of the query.
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 <i>Archive</i> , <i>Process</i> , <i>Role</i> or <i>User</i> . Workflow queries are either <i>Process</i> or <i>Role</i> . See Chapter 2, “Creating and Running Simple Queries,” Understanding Query Types, page 5.
Owner	Select from the following: <i>Private</i> : If you select this option, only the user ID that created the query can open, run, modify, or delete the query. <i>Public</i> : If you select this option, any user with access to the records used by the query can run, modify, or delete the query (if he or she has 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 receive multiple rows that look identical because some employees have the same JOBCODE. If you select the Distinct check box, you receive each JOBCODE 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.

See Also

[Appendix A, “Creating Workflow Queries,” page 73](#)

[Appendix B, “PeopleSoft Query Security,” page 75](#)

Viewing Underlying SQL Code

Access the View SQL page.

Records	Query	Expressions	Prompts	Fields	Criteria	Having	View SQL	Run
Query Name: PT_OBJSEC_USER		Description: User's Defn Security						
Query SQL: SELECT DISTINCT A.OPRID, D.DESCR100, C.ENTNAME FROM PSOPROBJ B, PSOBJGROUP C, PSOPRDEFN A, PSOBJSECDESC D WHERE B.OBJGROUPID = C.OBJGROUPID AND A.OPRCLASS = B.CLASSID AND C.ENTTYPE = D.ENTTYPE AND A.OPRID = :1								

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.

RecordsQueryExpressionsPromptsFieldsCriteriaHavingView SQLRun

User ID = PSADMIN

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

First1-100 of 12488Last

	User	Description	Object Name
1	PSADMIN	Fields	CERTORG
2	PSADMIN	Fields	CERTORGUNIT
3	PSADMIN	Fields	CERTSTATUS
4	PSADMIN	Fields	CHGPWDONEXPIRE
5	PSADMIN	Fields	CHGPWDONWARN
6	PSADMIN	Fields	CIDISCOVERY
7	PSADMIN	Fields	CLNTDESTFILE
8	PSADMIN	Fields	CLOCK_OPTION
9	PSADMIN	Fields	CMDLINETYPE
10	PSADMIN	Fields	CNFTOKEN

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 effect 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 and then select Enable Auto Preview. (The Preferences link is available on every page except the Run page.)

See [Chapter 2, “Creating and Running Simple Queries,” Specifying Query Preferences, page 10](#).

Download to Excel

Click this link to download your query to Microsoft Excel.

Note. To grant users access to download your query to Microsoft Excel, you must make sure that their permission lists 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 it. Save queries from any Query Manager page (except for the Run 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.

Enter a name to save this query as:

*Query:

Description:

Folder:

*Query Type:

*Owner:

Query Definition:

Saving a query

To save a query for the first time:

1. After you make your changes in Query Manager, click the Save button.
2. In the Query field, enter a short name for the query.
3. In the Description field, enter an appropriate description for the query. This information will help you identify the query later.
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.

Note. The folder that you create does not reside on your local drive. You create a folder for the purpose of describing the query and to facilitate grouping and sorting.

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*: 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.
7. Enter the query definition.
8. Click OK to save the query.

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 page you just saw 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.

If you want to run queries that you haven't saved, you can use the Run page in the Query Manager.

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. These are 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, and 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, and 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, and 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 remaining of the list.

6. To run a query, use the following links on the row of the query:

- HTML: Click to generate an HTML version of the query.
- Excel: Click to download the query to a Microsoft Excel spreadsheet.

- **Schedule:** Click to schedule a time for the query to run.

Note. If a Query—that is used as a data source for XML Publisher—is run through Reporting Tools, Query, Query Manager, the XML Publisher-related prompts do not appear. The normal basic table-formatted Query results are generated.

See [Chapter 4, “Modifying, Scheduling, and Organizing Queries,” Scheduling Queries, page 53](#).

See *Enterprise PeopleTools 8.49 PeopleBook: XML Publisher for PeopleSoft Enterprise*, “Running, Locating and Viewing XML Publisher Reports,” Running XML Publisher PeopleSoft Query Reports.

See Also

Enterprise PeopleTools 8.49 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 HTML link on the Query Manager or Query Viewer search page.
2. Click the Add to Favorites option on the Internet Explorer menu.
The Add Favorite page appears.
3. Change the text in the Name box to the name of your query.
4. Click OK.

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

Downloading Queries

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

After you have downloaded the query to Microsoft Excel, the first row in the spreadsheet displays the total number of rows of your query that are included in the spreadsheet.

Note. A Microsoft Excel spreadsheet can contain a maximum number of 65,536 rows. If the spreadsheet cannot include all of the rows in your query, the first row displays—in a red font—the total number of rows returned by the query. If this number is greater than 65,536, Microsoft Excel spreadsheet did not include the remaining rows.

If you download your query from the Run page, the query has a different default filename than if you download your query after clicking the HTML or Excel links. These default filenames are different because: (a) using the Run page to run queries, queries are run using the application server, and (b) using the HTML or Excel links, queries are run using a query service.

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

- **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 the HTML link on the Query Manager or Query Viewer search results page. However, you can also click the Download to Excel or Excel links without downloading the query to HTML.

Microsoft Excel 2000 or later is preferred. If you're using Microsoft Excel 97, select the *CSV Text File* link when you need to download large result sets.

You can configure your environment to open the Microsoft 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 Microsoft Excel Worksheets.

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

If you use the Windows 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 option 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 Microsoft 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 the HTML link. If you click this option, the File Download page appears, at which point you can open the file in your browser or save it to disk.

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

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

1. Open Windows Explorer.
2. Select Tools, Folder Options, File Types.
3. Select *XLS* (Microsoft Excel Worksheet).
4. Click the Advanced button, and select or clear the Browse in same window check box.

Applying a Formula to a Newly Inserted Column

When working in Microsoft Excel on a query that you have downloaded, adhere to the following guidelines in order to insert a new column into the spreadsheet, and 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, if you insert a column between columns B and C, the new column takes on the format of column B. If column B is formatted as *Text*, you cannot 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 by selecting Format, Cells, and then selecting *General* from the list of categories on the Number tab.

3. Insert the formula into the column.

Performing Lookups

Some queries are designed to prompt you for information when you run them. This approach narrows the query results to match the information that you entered. To help you enter the correct information, you can perform a search using the Look Up 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 Look Up 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 - Address List

Empl_ID: 

[View Results](#)

ID	Name	Address	City	State	Zip Code	Country
----	------	---------	------	-------	----------	---------

ADDRESSLIST page

To perform a lookup:

1. Click the HTML 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 Look Up button.
3. On the Look Up 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 Look Up 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 Look Up 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

Before you can print query results, you must run the query.

To print query results on your default printer:

1. Click either the HTML or Excel links.
2. Click the Print button or select File, Print.

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

If you download the query as a CSV text file, you can print it using the print functions of the applications you use to work with it.

Note. To grant users access to download your query to Microsoft Excel, you must make sure that their permission lists include the WEBLIB_QUERY web library with full access.

See *Enterprise PeopleTools 8.49 PeopleBook: Security Administration*, "Setting Up Permission Lists," Setting Query Permissions.

Using Query Viewer

Query Viewer is a read-only version of Query Manager. It enables security administrators limit some users to read-only access for all queries, so they can 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, 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 HTML or Excel button to the right of the query on the Search Results page.
- Download the results to a Microsoft Excel spreadsheet or a CSV Text file.
To download the results, first click the HTML link associated with the query on the Search Results page. Then, to download the results to a CSV text file, click the CSV Text File link on the HTML results of the query. To download the results to a Microsoft Excel file, click the Excel Spreadsheet link on the HTML results page.
- Print a query.
See [Chapter 2, "Creating and Running Simple Queries," Printing Query Results, page 26](#).
- Schedule a query.

From the Search results page, click the Schedule link associated with the query. Query Viewer interacts with PeopleSoft Process Scheduler to enable you 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 *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler*, “Using Process Monitor”.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler*, “Using Report Manager”.

Note. Online viewing of Query-based XML Publisher reports is available by navigating to Reporting Tools, XML Publisher, View Query Report.

See Also

Chapter 2, “Creating and Running Simple Queries,” Previewing Query Results Prior to Saving, page 19

Chapter 2, “Creating and Running Simple Queries,” Running Queries, page 22

Chapter 4, “Modifying, Scheduling, and Organizing Queries,” Scheduling Queries, page 53

Enterprise PeopleTools 8.49 PeopleBook: XML Publisher for PeopleSoft Enterprise, “Running, Locating and Viewing XML Publisher Reports,” Running Reports in Query Report Viewer

CHAPTER 3

Defining Selection Criteria

You define *selection criteria* to selectively retrieve the data that you want. Selection criteria refine 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:

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

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) it is in. When you create a query, select 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. This might be much more data than you want or need. 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 that you needed the names of all PeopleStore customers who were not PeopleSoft employees. You would start by creating a query that retrieved the Name and Company fields from the Customer table. You could then add a selection criterion that enables 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 preceding example, 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:

- View and edit selection criteria.
- Edit criteria properties.
- Select condition types.
- Enter comparison values.
- Specify effective date criteria.
- Relate multiple criteria.
- Relate multiple criteria.

Pages Used to Define Criteria

Page Name	Object Name	Navigation	Usage
Query	QRY_QUERY	Reporting Tools, Query, Query Manager Click the Create New Query link on the Query Manager search page. Click the Search button. Click the Add Record link to select a record for the query.	Select a record for the query criteria.
Fields	QRY_FIELDS	Reporting Tools, Query, Query Manager, Fields Select each field that you want to use in the query, and then click the Add Criteria icon, or click the Check All button to select all the fields associated with the record as criteria.	Select the fields to be used as criteria for the query.
Criteria	QRY_CRITERIA	Reporting Tools, Query, Query Manager, Criteria	View and edit selection criteria for your query statement.
Edit Criteria Properties	QRY_CRITERIA_SEC	Reporting Tools, Query, Query Manager, Criteria Click the Add Criteria button on the Criteria page or click the Use As Criteria link on the Fields page.	Edit selection criteria properties for your query statement.

Viewing and Editing Selection Criteria

Access the Criteria page.

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

Query Name: AE_PRODUCT Description: AE Product Info

Add Criteria Group Criteria Reorder Criteria

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.AE_PRODUCT - Product	equal to	AR	Edit	[-]
AND	A.AE_PRODUCT - Product	equal to	OM	Edit	[-]

Save Save As New Query Preferences Properties New Union Return to Search

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 that you have defined or as an alternative criterion. The first criterion that 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 the Reorder Criteria button, enter the new positions for the criteria on the Edit Criteria Ordering page, and click OK. You can also click the Add Criteria button from this Criteria page to add additional criteria, and you can click the Group Criteria button to group your criteria logically.

Editing Criteria Properties

Access the Edit Criteria Properties page.

Edit Criteria Properties

Choose Expression 1 Type

☒ Field
☐ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:

A.AE_PRODUCT - Product

*Condition Type: equal to

Choose Expression 2 Type

☐ Field
☐ Expression
☒ Constant
☐ Prompt
☐ Subquery

Expression 2

Define Constant

Constant: AR

OK Cancel

Edit Criteria Properties page

Field

Select this option 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 then select a condition type.

See [Chapter 3, "Defining Selection Criteria," Selecting Condition Types, page 32](#).

Select the appropriate comparison operator from the Condition Type drop-down list box.

Expression

Select this option 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 and click the New Expression link to create a new expression, you must then select an expression type. If you are entering an aggregate value, select the Aggregate Function 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 SQL.

Creating Criteria Based on a Field

To create criteria based on a field:

1. Access the Edit Criteria Properties page.

If you accessed the page by clicking the Use As Criteria link on the Fields page, Query Manager displays the Edit Criteria Properties page with the selected field populated in the Expression 1 field.

2. Specify the criteria for the field, and click OK to return to the Fields or Criteria page.

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

Creating Criteria Not Based on a Field

To create criteria that is not based on a field:

1. Access the Edit Criteria Properties page by clicking the Add Criteria button on the Criteria page.

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

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

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.

Query Manager also offers a *not* option that reverses the effect of each condition type. For example, *not equal to* returns all rows that *equal to* would not return.

Note. You should 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 an SQL expression that enables it to use the indexes.

This table describes the available condition types:

Condition Types	Return Values
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.
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 that contain a combination of dynamic details and range details. The results returned from trees with this combination of details may be inaccurate. See <i>Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Tree Manager</i>, “Using PeopleSoft Tree Manager”.
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.

Condition Types	Return 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 wild-card 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 wild-card characters that your database software supports. See your the documentation for your database management system for details. To use one of the wild-card 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.

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 an expression list.
- Add comparison values to an expression list.

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

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

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 select <i>Field</i> as the comparison value, the Choose Record and Field page 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 that you enter, which PeopleSoft Query evaluates once for each row before comparing the result to the value in the selected field. When you select <i>Expression</i> as the comparison value, the Define Expression page appears. In the text box, enter a valid SQL expression. To add a field or user prompt to the expression, click the Add Field or Add Prompt link, respectively. These links display the same pages that you see when adding a field or prompt as a comparison value: Add Prompt displays the Run-time Prompt page; Add Field displays the Select a Field page. 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 <i>Constant</i> as the comparison value, the Define Constant page appears. In the text box, enter the value that you want to compare the first expression to. To add a value by selecting it from a list, click the Look Up button to display the Select a Constant page. Note. A list of constants is available only for fields that have translate values or an assigned prompt table.
Prompt	The value in the selected field is compared to a value that you enter when running the query. When you select <i>Prompt</i> as the comparison value, the Define Prompt page appears. Click the New Prompt link to move to the Edit Prompt Properties page. To modify an existing prompt, click the Edit Prompt link. See Chapter 3, "Defining Selection Criteria," Defining Prompts, page 43.

Value Type	Action
Subquery	The value in the selected field is compared to the data that is returned by a subquery. When you select Subquery as the comparison value, the Define Subquery page 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 65.
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 <i>in list</i> or <i>not in list</i>. When you select <i>in list</i> as your comparison value, the Edit List page appears. Use the Look Up button to display the Edit List page and search for the desired values. Note. Values will appear here only if you have entered them previously.
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 <i>in tree</i> or <i>not in tree</i>. When you select <i>Tree Option</i> as the comparison value, the Select Tree Node List page appears. Use this page 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 that is 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 page 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 Look Up button to display the Select a Constant page.

Note. A list of constants is available only for fields that have translate values or an assigned prompt table.

Select a Constant page

To select a constant:

1. Click the Look Up button on the Select a Constant page.
The Look Up page appears.
2. Select the value that you want from the result list by clicking its associated link.
The Select a Constant page appears again with the selected value in the field. If you are working with a date field, you can select a date/constant from a calendar.
3. If more than one field exists on the Select a Constant page, you must repeat steps 1 and 2 for each field to further narrow your search for the constant.
4. Click OK.

The Edit Criteria Properties page appears with the selected value in the Define Constant page.

Building a List of Values

When you select *In List* as your comparison value, the Edit List page appears. Use this page to build a list of values for PeopleSoft Query to compare to the value from the first expression. (After you have created such a list, you can also use this page to select from the list.) To add a comparison value to the list, click the Look Up button on the Edit List page. 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	To add a value, enter it into the Value text box and click the Add Value button. The value appears 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 Look Up button to display the Look Up page. Enter part of a value in the text box. The system automatically adds a wild card to the end of the entry, which enables you to do a partial search. For example, if you enter a value of <i>10</i>, the system returns all values, (up to a total of 300), that begin with 10, such as <i>10</i>, <i>100</i>, and <i>10069</i>. 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 appears 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. Note. The prompts must be defined before you can select them. If no prompts have been defined, you will receive an error message.
OK	Click to accept the values that are listed in the List Members grid. You will return to the Edit Criteria Properties page, where the selected values are displayed in the Edit List page.
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.

Note. You must have defined the prompts before you can add them to your expression list.

To add prompts to an expression list:

1. With the expression list open, click the Add Prompt link to access 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 page appears showing the prompt that you have already added.

4. To add the next prompt, click the New button and complete the Run-time Prompt page.

The settings for this second prompt are the same as those that are 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 page.

- Repeat this process for each prompt that you want to add.

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

Adding Comparison Values to an Expression List

When you select Tree option as the comparison value (available if you select the *in tree* or *not in tree* condition type), the Select Tree Node List page appears. Use this page 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 tree that you want 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.

Display and Select TreeNodes

SetID: QEDM2
 Effective Date: 01/01/1900

Tree Name: QE_ACCOUNTS

Selected Nodes List

1001 - 1001			
1022 - 1022			

Manual Selection

[ALL ACCOUNTS](#) > **INCOME STATEMENT**

[Collapse All](#) | [Expand All](#)

[First Page](#)
[6 of 886](#)
[Last Page](#)

ALL_ACCOUNTS - ALL_ACCOUNTS

INCOME STATEMENT - INCOME STATEMENT

NET INC AVAIL COMM - NET INC AVAIL COMM

BALANCE SHEET - BALANCE SHEET

STATISTICS - STATISTICS

HISTSTAT - HISTSTAT

Selecting tree nodes on the Display and Select TreeNodes page

To select tree nodes:

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

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

3. Remove nodes from the list by clicking the Remove from List icon corresponding to the node to be deleted.
4. Display the selected tree branch by clicking the corresponding icon.
5. When you are done selecting nodes, click OK.

The selected tree SetID, tree name, effective date, and nodes appear in the Select Tree Node List page.

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 enabling 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 use a PeopleSoft application for day-to-day processing, you usually want the system to give you the *currently effective* rows of data—the rows 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 query an effective-dated table, however, you may 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:

Expression 1 Record Alias.EFFDT

Condition Type EffDt <=

Expression 2 Current Date

Effective Sequence Last

2. If you select 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 Define 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 page 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 that you define in the Define Expression page.

- 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 that is 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.
- Removing the *Effective Date* criterion is equivalent to selecting *No Effective Date*. The query returns 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 (for example, all future-dated rows or all history rows), enter a selection criterion in the Effective Date field. Use the standard comparison operators rather than the Effective Date comparison operators.

Remember that the effective date operators work differently than the standard comparison operators: they always return a single effective-dated row. For example, *Eff Date* $\leq$ returns the one row for which the EFFDT value is most recent, whereas not greater than would return the currently active row *and* all history rows.

See Also

Enterprise PeopleTools 8.49 PeopleBook: Using PeopleSoft Applications, “Working With Pages,” Using Effective Dates

Relating Multiple Criteria

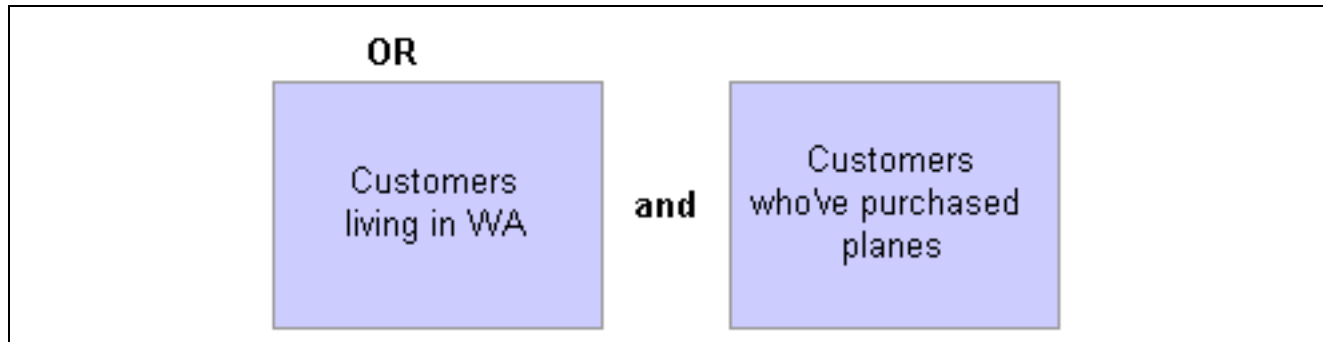
Using PeopleSoft Query, you can relate multiple criteria in specific ways that you define using the AND, AND NOT, OR, and OR NOT operators. You can also group criteria using parentheses.

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 are querying your list of customers and you have defined two criteria: one selects customers from the state of Washington and another 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* the second criterion for PeopleSoft Query to return it. When you link two criteria with OR, a row must meet the first *or* the second criterion, but not necessarily both.

By default, PeopleSoft Query assumes that you want rows that meet all of the criteria that 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 box.

Grouping Criteria with Parentheses

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

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

Criteria					
			Personalize Find	First ◀ 1-3 of 3 ▶ Last	
Logical	Expression1	Condition Type	Expression 2	Edit	Del
	A.QE_MAR_STATUS - Marital Status	not equal to	M	Edit	—
AND	A.STATE - State	equal to	CA	Edit	—
OR	A.STATE - State	equal to	BC	Edit	—

Example of criteria that returns an incorrect result

The set of criteria that was entered in the previous sample page 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, the following set of criteria returns the result that you want:

Criteria					
Personalize Find					
First		1-3 of 3		Last	
Logical	Expression1	Condition Type	Expression 2	Edit	Del
	A.QE_MAR_STATUS - Marital Status	not equal to	M	Edit	-
AND	(A.STATE - State	equal to	CA	Edit	-
OR	A.STATE - State	equal to	BC)	Edit	-

Adding parentheses around the last two criteria

To group criteria:

1. Click the Group Criteria button on the Criteria tab.
The Edit Criteria Grouping page appears.
2. Use the edit boxes to enter parentheses for the criteria as needed.

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 Prompts

This section provides an overview of prompts and discusses how to edit prompt properties.

Understanding Prompts

Adding a prompt lets you further refine a query when you run it. For example, suppose that you want to change a query so that you could prompt the user to enter a value for the duration of a vacation. Before you add the prompt, the query always retrieves rows for employees who had 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, and then the query can return employees based on the value provided when running the query.

When you run a query with a prompt, a prompt page requests the required value. All date, time, and datetime prompt fields are required fields when running Query. Enter the value into the field. 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 Table drop-down list box shows its name.

Pages Used to Define Prompts

Page Name	Object Name	Navigation	Usage
Prompts	QRY_PROMPT	Reporting Tools, Query, Query Manager, Prompts	Add or edit a prompt.
Edit Prompt Properties	QRY_PROMPT_SEC	Reporting Tools, Query, Query Manager, Prompts Click the Add Prompt button or the Edit button on the Prompts page.	Edit the prompt properties.

Editing Prompt Properties

Access the Edit Prompt Properties page.

Edit Prompt Properties page

To define prompts:

1. From the Prompts page, 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.

2. Click the Look Up button next to the Field Name 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 page based on its properties.

Type Indicates the type of the field.

Format Specifies the field format. Over a dozen formats are available, including Name, Phone, Social Security Number, and Zip Code.

Length Indicates the field length.

Decimals	Defines the number of decimals that are allowed.
Edit Type	Defines the type of field edit for the specified field. <i>No Table Edit</i> is the default value. In general, you should use the same edit type that is used in the field record definition so that this edit type is consistent throughout Enterprise PeopleTools.
Heading Type	Select a heading type for the prompt from the following values: <i>Text</i> : The prompt heading is the free text that you have entered in the text box. <i>RFT Short</i> : The prompt heading is the short name from the record definition. <i>RFT Long</i> : The prompt heading is the long name from the record definition.
Heading Text	Displays the label for the text box where you enter the comparison value. To change the text, select <i>Text</i> from the Heading Type drop-down list box, and then enter the new label in the Heading Text text box.
Unique Prompt Name	A default value that Query Manager generates for globalization. Only base language users can set this value to uniquely identify a query prompt parameter.
Prompt Table	If the edit type is <i>Prompt Table</i> , you can select a prompt table to use. If the edit type is <i>Translate Table</i> , 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 Appendix B, “PeopleSoft Query Security,” page 75 .

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, you should not use multikey prompt tables.

See Also

[Chapter 2, “Creating and Running Simple Queries,” Adding Fields to Query Content, page 12](#)

Defining HAVING Criteria

SQL does not support the use of aggregate functions in WHERE clauses. Therefore, after 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*. You might use such criteria, for example, when you want a list of the departments whose minimum salary is greater than 100,000.00 USD.

In SQL, a HAVING clause is similar to 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 are grouped by the aggregate function, and then it evaluates HAVING clauses *after* applying the function. So if you want to check the value that is returned by the function, you must define a HAVING criterion.

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

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

Defining Expressions

This section provides an overview of expressions and discusses how edit expression properties.

Understanding 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.

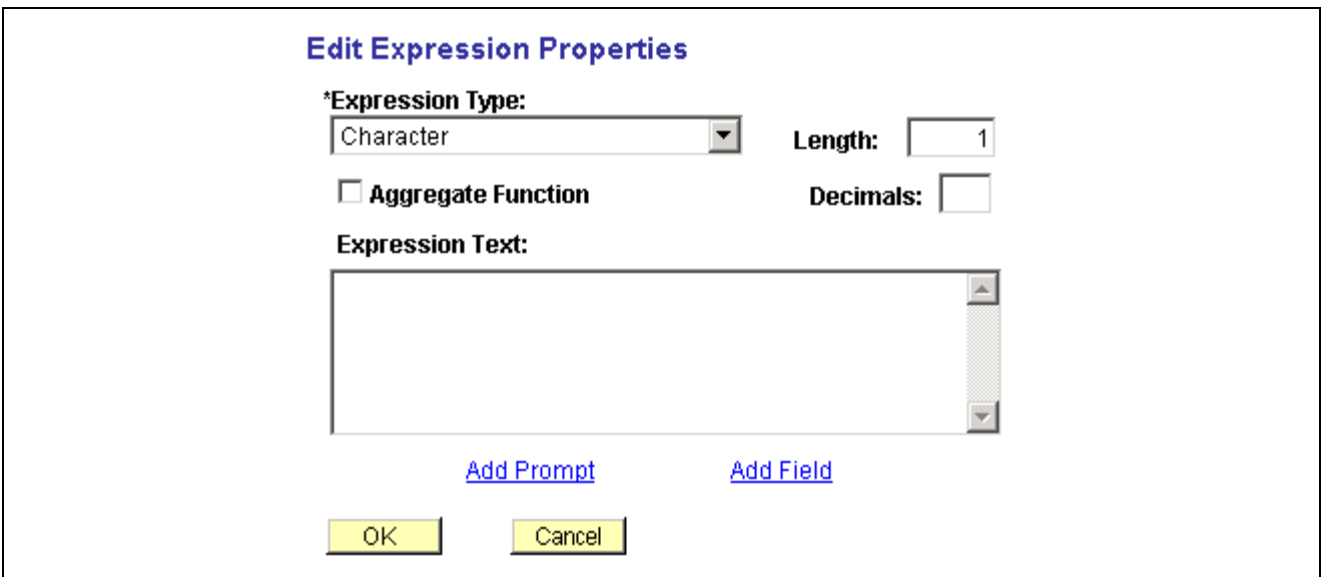
You can work with an expression as if it were a field in the query: select it for output, change its column heading, or choose it as an “order by” column.

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

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

Editing Expression Properties

Access the Edit Expression Properties page.



Edit Expression Properties page

To add or edit expressions for queries:

1. Select Reporting Tools, Query, Query Manager, then click the Create New Query link, and then select the Expressions tab to open the Expressions page.
2. The query name appears in the Query Name field.

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 option from the Expression Type drop-down list box.

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.

Note. For *Number* and *Signed Number*, expression types, the Length field defines the total length of the number (integer portion + decimals portion). For example, if Length = 10 and Decimals = 3, then this means that the integer portion = 7 (Length - Decimals = Integer).

5. If you are entering an aggregate value, such as SUM, AVG, or COUNT, select the Aggregate Expression check box.
6. In the Expression Text field, enter the expression (for example, *A. Total * .1*, where *A* represents the first record.)
 Query Manager inserts the expression into the SQL for you. You can include Oracle hints in PeopleSoft Query expressions as long as you adhere to the following rules:
 - Expressions containing a hint must begin with */*+ .*
 - Expressions can contain only one hint.
 For example, only one set of */*+ */* is allowed.
 - Expressions must contain a complete hint.
 For example, an expression can't have only */*+* or **/*. Both must be in the same expression.
7. Click the Add Prompt button to add prompt properties for this expression; click the Add Field button to add another field to this expression.

Note. You must define a prompt, as described in the next section, before you can add it to your 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 need to make sure that 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 8.49 PeopleBook: PeopleCode Language Reference, “Meta-SQL,” Meta-SQL

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.
- Repair existing queries automatically.

Opening Existing Queries

Use Query Manager to open and view queries.

Query Manager

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

[Find an Existing Query](#) | [Create New Query](#)

*Search By: begins with

[Advanced Search](#)

Search Results

*Folder View:

*Action:

Query	Customize	Find	View 1.00	First	31-60 of 164	Last		
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Schedule
☐	DW_HIERMAP_KEY	Star schema key of hierarchy	Public		Edit	HTML	Excel	Schedule
☐	DW_INSTANCE_DEF	Default instance information	Public		Edit	HTML	Excel	Schedule
☐	DW_INSTANCE_ESS	Essbase specific information	Public		Edit	HTML	Excel	Schedule
☐	DW_INSTANCE_PPL	PowerPlay specific information	Public		Edit	HTML	Excel	Schedule
☐	DW_INSTANCE_STAR	Star Schema Instance	Public		Edit	HTML	Excel	Schedule

Query Manager Search Results page

To open an existing query from your browser:

1. Select Reporting Tools, Query, Query Manager.
The Query Manager Search Results 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, type, uses field name, and uses record name. The basic search enables you to search using the *begins with* condition. The advanced search enables you to perform a progressively narrower search using one or more *search by* criteria and selecting from a choice of conditions for each *search by* criterion. The following list 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 box to search queries by either name or description, and 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, and 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.

- 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 listing the query name, description, owner, and folder for all the queries that match the search criteria.

3. Click the Edit link on the row of the query that you want to modify.

See Also

Enterprise PeopleTools 8.49 PeopleBook: PeopleCode Language Reference, “Meta-SQL”

Renaming Queries

You can rename existing queries.

Rename Queries

Enter new names for the queries on the right.

Query Name	Owner	New Name
EMPLOYEE_QUERY	Private	QRY_EMPL
CM_ATTRIBUTES	Public	ATTR_MAPPINGS

OK Cancel

Rename Queries page

To rename a query:

1. Select PeopleTools, Utilities, Administration, Query Administration.
2. On the Admin (Administration) page, choose a predefined search or a manual search by clicking the respective Search button.
3. Select the Queries from the Query List.
4. Click Rename.

The Rename Queries page appears, listing the current query names and query owners.

5. Enter new names for the queries in the New Name field.
6. Click OK to save your changes.

Note. Alternatively, you can use the Query Manager search page (Reporting Tools, Query, Query Manager) to rename a query. You must first select a query that you want to rename, and then select *Rename Selected* from the Action drop-down list box.

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. Select PeopleTools, Utilities, Administration, Query Administration.

2. On the Admin (Administration) page, choose a predefined search or a manual search by clicking the respective Search button.
3. Click Delete.

The Query Delete Verification page appears.

4. Click Yes to confirm the deletion or No to avoid deletion.

Note. Alternatively, you can use the Query Manager search page (Reporting Tools, Query, Query Manager) to delete a query. You must first select a query that you want to delete, and then select *Delete Selected* from the Action drop-down list box.

Updating Existing Queries

At times, you might want to update a query to reflect new conditions or copy an existing query and modify it for other uses. You can open a query, examine it to determine whether it is suitable, and then use the Save As function to save it with a new name.

To update an existing query:

1. Select Reporting Tools, Query, Query Manager.
2. On the Query Manager Search Results page, find the query that you want to modify and click its Edit link.

The Fields page appears.

3. Navigate to the page that you want to modify—except the Run page.
4. Enter the new information on the page.
5. Click either the Save button to update the existing query, or the Save As link to save a different instance of the query under a new name.

Note. When using Microsoft Windows-based Query Designer, any modification to a previously saved query needs to be saved before downloading query results to Microsoft Excel or to Crystal Reports 9. A message will appear reminding you to save your work. This is to ensure that accurate data are displayed. New ad-hoc queries that have never been saved before in the database can be downloaded to Microsoft Excel and to Crystal Reports 9 without having to save after every modification.

Repairing Existing Queries Automatically

A record definition that is used in a query may change. When this occurs, PeopleSoft Query automatically repairs the query when it is opened. A warning message informs you 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.

Problem	Action
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 in the query.	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 no longer appears 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 need to use Query API.

See Also

Enterprise PeopleTools 8.49 PeopleBook: Security Administration, “Setting Up Permission Lists,” Setting Query Permissions

Scheduling Queries

Query Manager interacts with PeopleSoft Process Scheduler to enable you 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 Schedule Query page submits a process request and brings up the Process Request page, which 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.

Schedule Query

Run Control ID: RUN_QRY [Report Manager](#) [Process Monitor](#)

Query Name:

*Description:

[Update Parameters](#)

Prompt Name	Value
OPRID	QEDMO

Schedule Query page

To submit a process request:

1. Select Reporting Tools, Query, Schedule Query.
2. Search for and select an existing run control ID, or select the Add New Value tab to enter a new ID.
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 that is required for each available prompt. When values have been selected, they appear in the Prompt Name and Value fields.

Note. If the query does not have any prompt, the Update Parameters link does not appear.

Note. If you have one or more Asian languages installed, select the language that you want 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 submit the query process request and display the Process Scheduler Request page.
When you are 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.

Note. If a Query that is used as a data source for XML Publisher is run through Reporting Tools, Query, Schedule Query, the XML Publisher-related prompts do not appear. The normal basic table-formatted Query results will be generated.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler*, “Submitting and Scheduling Process Requests”.

See *Enterprise PeopleTools 8.49 PeopleBook: XML Publisher for PeopleSoft Enterprise*, “Running, Locating and Viewing XML Publisher Reports,” Scheduling Reports in Query Report Scheduler.

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.

Process Scheduler Request

User ID: QEDMO **Run Control ID:** RUN_QRY

Server Name: PSNT **Run Date:** 01/30/2007

Recurrence: Daily Purge **Run Time:** 1:00:00AM Reset to Current Date/Time

Time Zone: PST Pacific Time (US)

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
☒	PSQUERY	PSQUERY	Application Engine	Web	TXT	Distribution

OK Cancel

Process Scheduler Request page

To select a process request:

1. Select Reporting Tools, Query, Schedule Query.
2. Select a run control ID, and click the Run button.
The Process Scheduler Request page appears.
3. Complete the fields on the Process Scheduler Request page.

Server Name	Select the name of the server on which you want the process to run.
Recurrence	Select the recurring time intervals for the process to run. For example, to run a process every weekday at 5:00 p.m., select the predefined recurrence definition <i>M-F at 5pm</i> .
Time Zone	Select the time zone in which the process will run. For example, you might be in Eastern Standard Time (EST) and schedule a process to run in Pacific Standard Time (PST).
Run Date	Select the date on which you want the process to run.
Run Time	Select the time at which you want the process to run.
Reset to Current Date/Time	Click to reset the run date and time to the present date and time.
Select	Select a job or process to run.

	You can select multiple jobs and processes.
Description	Identifies a process or job. Jobs are listed as links. Click the link to display the Job Detail page, which shows all of the individual processes and jobs that are associated with the selected main job.
Process Name and Process Type	Identifies the name and type (such as COBOL or Crystal) of the process as it appears in the process or job definition.
Type	Select the output type for this job or process. An output type that is selected for a process at the process definition level overwrites the output type and the output type drop-down list box becomes unavailable. An output type that is selected for a job at the main job level carries through to the job items. An output type that is selected for individual job items overwrites the output type that is entered for the parent job. Values are: <i>File:</i> Writes the output to the file that you indicate in the Output Destination field. Note. For PS/nVision, the Output Destination must contain the full path and the name of the file. <i>Printer:</i> Sends the output to a printer. You can enter a custom printer location in the Output Destination field if you have the appropriate security access. If the Output Destination field is left blank, the printer that is defined on the Process Profile Permissions page is used. If that printer is undefined, the default printer that is defined for the process scheduler is used. <i>Email:</i> Sends the output through an email. To distribute a report to an email list, enter the appropriate information on the Distribution Detail page by clicking the Distribution link. By default, the output is sent through email to the person running the process. This option is available for Structured Query Reports (SQR), PS/nVision, and Crystal reports. <i>Web:</i> Sends all output of the process to the report repository, including log and trace files. The format of the report is specified by the format list. <i>Window:</i> Sends the output to a new browser window. The status of the process now appears in the new browser window before the results are displayed. The different statuses are <i>Queued</i>, <i>Initiated</i>, <i>Processing</i>, <i>Success</i>, <i>Error</i>, or <i>Warning</i>. All output for the process is also sent to the report repository, including log and trace files. The format of the report is specified by the format list. When multiple processes are requested, a new browser window is opened for each request.

Note. This output type is not available if the user does not have REN Server *Report Window* permission, or if no active REN Server cluster is available for Reporting.

To grant access to the new browser window, the permission lists of the users must include full access for the Realtime Event Notification for Reporting Window and the WEBLIB_RPT web library with full access.

Format

Select the output format for this job or process.

When an output format is selected for a process at the process definition level, it cannot be changed. Therefore, the output format drop-down list box becomes unavailable.

Note. An output format that is selected for a job at the main job level carries through to the job items. The format that is selected for individual processes or jobs that are attached to a job overrides the format that is entered for the parent job.

Note. To get text-wrapping support for very long text fields, use HTML format.

Note. PDF format has a maximum page width size of approximately 353 cm and it does not support text-wrapping. All output columns must fit within this limit. A column's size will be as wide as the longest text it has to accommodate. If a text field's length needs more than 353 cm of space, the text may go beyond its column border and successive columns will not print.

Distribution

Click the Distribution link to access the Distribution Detail page, where you enter additional distribution information when the output type is *Web*, *Window*, or *Email*. Also use this page to select a folder name to which the output should be distributed when the output type is *Web* or *Window*.

4. Click OK to run the query.

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

5. 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

The Process Monitor can be used to view the status of your process requests.

You can access the Process Monitor by clicking the Process Monitor link on the Schedule Query page or by navigating to PeopleTools, Process Scheduler, Process Monitor.

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

- The Process List page enables you to monitor the process requests that you have submitted.
You can select filtering options—for example, process type and run status—to view only selected process requests. And you can click the Details link to view details that are associated with particular process requests.
- The Server List page enables you to monitor the PeopleSoft Process Scheduler server agents within your system.

Process List [Server List](#)

View Process Request For

User ID: Type: Last:

Server: Name: Instance: to

Run Status: Distribution Status: ☐ Save On Refresh

Process List [Customize](#) | [Find](#) | [View All](#) | [First](#) | [1-2 of 2](#) | [Last](#)

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
☐	9999969		Application Engine	PSQUERY	QEDMO	02/01/2007 10:25:17AM PST	Success	Posted	Details
☐	9999968		Application Engine	PSQUERY	QEDMO	02/01/2007 10:01:57AM PST	Success	Posted	Details

[Go back to Schedule Query](#)

Process Monitor - Process List page

User ID	View the processes that were submitted by a particular user ID. Usually, you view by your own user ID.
Type	View by a particular process type—for example, <i>Application Engine</i> .
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 box, and then select a unit type from the drop-down list box. Values are <i>Days</i> , <i>Hours</i> , and <i>Minutes</i> .
Refresh	Click to check the current status of a process. This button refreshes the list.
Server	Select to view processes that 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 <i>Success</i> or <i>Error</i> .

Distribution Status	Displays the distribution status for each individual job and process. Valid statuses are <i>N/A</i> , <i>None</i> , <i>Generated (OS390)</i> , <i>Not Posted</i> , <i>Posting</i> , and <i>Posted</i> .
Save On Refresh	Select to save filter criteria changes when you click the Refresh button.
Instance	Displays the process instance, that is, the order in which the process appears in the queue. This number is automatically generated.
Seq (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 Detail page.

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 on the Schedule Query page.

The screenshot shows the 'List' tab selected in the Report Manager interface. At the top, there are tabs for 'List', 'Explorer', 'Administration', and 'Archives'. Below these is a 'View Reports For' section with filters for Folder, Instance, to, Name, Created On, and Last, along with a 'Refresh' button. A table titled 'Reports' displays a list of reports with columns for Report, Report Description, Folder Name, Completion Date/Time, Report ID, and Process Instance. Two reports are listed: 'Users and Permission Lists' and 'Message Sets'. At the bottom, there is a link to 'Go back to Schedule Query'.

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 Users and Permission Lists	USERS AND PERMISSION LISTS	General	02/01/07 10:25AM	9999945	9999969
2 Message Sets	MESSAGE SETS	General	02/01/07 10:02AM	9999944	9999968

List page

Note. XML Publisher reports may also be viewed by navigating to Reporting Tools, XML Publisher, XMLP Report Search.

See Also

Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler, “Using Process Monitor”

Enterprise PeopleTools 8.49 PeopleBook: Using PeopleSoft Applications, “Working With Processes and Reports”

Enterprise PeopleTools 8.49 PeopleBook: XML Publisher for PeopleSoft Enterprise, “Running, Locating and Viewing XML Publisher Reports,” Searching the XML Publisher Report Repository

Specifying a User’s Language

For scheduled queries, the system uses the language that is specified in the user’s profile, not the language that is selected during sign-in. The system also uses the international and regional settings that the user has specified using My Personalizations. If you have not specified personal settings, the system uses the default installation international settings.

Note. Most PeopleSoft components can use the international settings from the browser by default 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 8.49 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 a folder.

Adding Queries to the My Favorite Queries List

The Query Manager and Query Viewer search pages can 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.

Note. Although you can view a list of favorites, you can’t create a list of favorites in the Query Viewer.

To add a query to the My Favorite Queries list:

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

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

Note. You can add multiple queries to the My Favorite Queries list at once by selecting several queries before selecting *Add to Favorites* and clicking the Go button.

Copying a Query to Another User's List of Queries

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

Note. You can copy only non-public 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 does not appear in the target user's list of queries. When permission has been granted, the query appears in the list.

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

1. Select Reporting Tools, Query, Query Manager.
2. On the Query Manager search results page, select the query or queries that you want to copy.
3. Select the *Copy to User* option from the Action drop-down list box.
4. Click the Go button.

The Enter User ID page appears.

5. Enter the user ID of the user to whom you want to copy the query.
6. Click OK.

Moving a Query to a Folder

Organizing queries in folders can help you more easily access the queries.

To move a query to a folder:

1. Select Reporting Tools, Query, Query Manager.
2. On the Query Manager search results page, select the query or queries that you want to move to an organization folder.
3. Select the *Move to Folder* option from the Action drop-down list box.
4. Click the Go button.

The Move to Folder page appears.

5. Select one of the following:
 - *Select an existing folder to move to:* From the drop-down list box, select the folder to which you want to move the queries.
 - *OR enter a folder name to move to:* Enter the name for a new folder to which you want to move the queries.
6. Click OK.

CHAPTER 5

Working with Advanced Query Options

This chapter discusses how to:

- Work with aggregate functions.
- Work with subqueries.
- Work with unions.
- Join records.

Note. Familiarity with SQL is helpful when writing more advanced queries.

Working with Aggregate Functions

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

Understanding Aggregate Functions

In a standard query, each row in the result set corresponds to an individual row in the table that you are querying. Sometimes, however, you instead want 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*.

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 that your Order table includes (among other fields) a customer ID and an amount for each item that was ordered. You want to determine 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 are in the table. If Stuart Schumacher ordered 10 items, you would 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 collapses all the rows with the same value in the non-aggregated column (customer ID) 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 (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.

Applying an Aggregate Function to a Field

When you apply an aggregate function to a field, you are 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 that is associated with the appropriate field.
The Edit Field Properties page appears.
3. Select the aggregate function that you want to use for this field, and click OK.

The abbreviation for the selected function appears in the Agg (Aggregate) column. If a function is not available for the field that you have selected, the Edit Field Properties page does not close. For example, you cannot use *Sum* with a character field, but you can use *Count*, *Min*, and *Max*.

Note. In addition to the previously listed aggregate functions, you can use any aggregate function that is supported by the underlying database by creating an expression component.

See Also

[Chapter 3, “Defining Selection Criteria,” Defining Expressions, page 46](#)

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 determine whether his or her employee ID is in the MEMBERSHIP table. That is, 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.

The following examples show the Criteria page when you are using a subquery and the Query page when you are creating a subquery:

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

Query Name: QE_EMPLOYEES Description: QE EMPLOYEE INFO

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

Add Criteria Group Criteria Reorder Criteria

Criteria	Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	[dropdown]	A.EFFDT - Effective Date	Eff Date <=	Current Date	[Edit]	[minus]
	AND	A.EMPLID - EmplID	in list	SUBQUERY	[Edit]	[minus]
	AND	A.EFFDT - Effective Date	equal to	A.EFFDT - Effective Date	[Edit]	[minus]

Criteria page when you are using a subquery

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

Query Name: AE_PROCESS Description: AE EMPLOYEE INFO

Working on selection: Subquery for A.DTTM_STAMP_SEC - Last Update DateTime [Subquery/Union Navigation](#)

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

Chosen Records

Alias Record

C AEREQUESTPARM - AE Request Parameters [Hierarchy Join](#) [minus]

Fields	Find	View All	First	1-6 of 6	Last
Select OPRID - User ID					
Select RUN_CNTL_ID - Run Control ID					
Select AE_APPLID - Program Name					
Select AE_STATE_RECNAME - State Record					
Select AE_BIND_VAR - Bind Variable Name					
Select AE_BIND_VALUE - Value					

[Join PSAEAPPLSTATE - Application state record](#)

Query page when you are creating a subquery

To create subqueries:

1. Select Reporting Tools, Query, Query Manager.

2. Click the Use As Criteria link on the Query page or click the Add Criteria button on the Criteria page.
3. On the Edit Criteria Properties page, select *Subquery* as the comparison value.

PeopleSoft Query displays a special Query Manager view where you can select a record. See the example of the Query page with subquery above.

4. On the Query - Subquery 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 of each page of the main query and the subqueries.

5. 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, both the long and short descriptions, cannot be displayed in a union query. Only the code for the field can be selected for output display.

Similarly, values from the related language record are not retrieved for union queries.

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

To create a union:

1. Click the New Union link, which is available on the bottom of each Query Manager page except for the Run page.

PeopleSoft Query automatically switches to the Records tab 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 that 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 that you 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), you can easily use Query Manager to create joins.

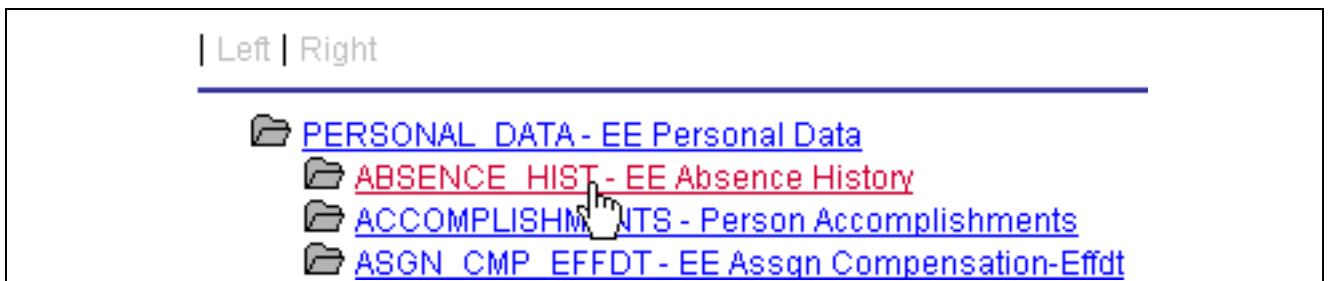
The procedure for joining tables differs depending on how the tables that are being joined are related to each other. Query Manager recognizes three types of joins: record hierarchy, related record, and any record.

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 join 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. Select 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 the previous example, the ABSENCE_HIST record is selected.
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, PeopleSoft Query displays a join link to the right of the shared field.

The following example shows that you can join the QEDMO Employee record to the JobCode record by using the QE_JOBCODE field, or you can join the QEDMO Employee record to the Data Department Table by using the DEPTID field:

The screenshot shows the 'Query' page in PeopleSoft Query Manager. The 'Query Name' is 'New Unsaved Query'. The 'Description' section contains instructions: 'Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.' Below this is the 'Chosen Records' section, which lists 'A QE_EMPLOYEE - QEDMO Employee'. To the right of this record is a 'Hierarchy Join' link and a minus sign. Below the record name are two buttons: 'Check All Fields' and 'Uncheck All Fields'. The 'Fields' section is expanded, showing a list of fields with checkboxes: EMPLID - EmplID, EFFDT - Effective Date, QE_EMPLOYEE_NAME - Employee Name, QE_FIRST_NAME - First Name, QE_LAST_NAME - Last Name, QE_SOC_SEC_NBR - Social Security Number, QE_JOBCODE - JobCode, and DEPTID - Department. To the right of the 'QE_JOBCODE' and 'DEPTID' fields are join links: 'Join QE_JOBCODE_TBL - JobCode Table' and 'Join QE_DEPT_TBL - QE Data Department Table'. The 'Fields' section also includes a 'Find' button, a 'View All' link, and a pagination indicator '1-8 of 8'.

Query page showing related record join links

To create a related record join:

1. Select the base record for your query and select the appropriate fields and criteria.
2. From the Query page, click the Related Record Join link.
3. From the Select Join Type page, select the standard join option and click OK.

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 Records page to select the second record. When you return to the Records page, you see the link Join Record rather than Add Record to the right of all listed record names.

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

To access the Query Preferences page, click the Preferences link on any page of Query Manager.

Creating Outer Joins

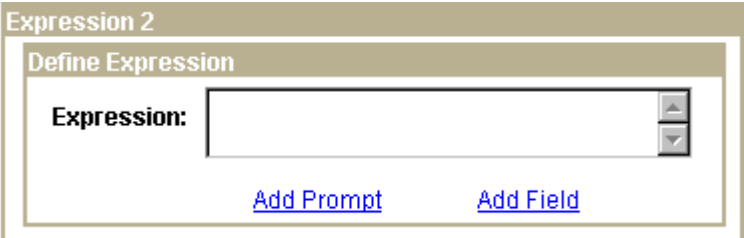
An outer join forces a row from one of the participating tables to appear in the result if no matching row exists.

Note. You can create an outer join using this method only 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 70.](#)

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.

The following example shows the Define Expression page:



Define Expression page

Creating an Outer Join for Oracle 8

To create an outer join for Oracle 8:

1. From the Criteria page, click the Edit button to the right of the required field from the primary record.
2. In the Condition Type drop-down list box, accept the default operator value of *Equal To*.
3. In the Expression 2 Type section, select the value of *Expression*.
The Define Expression text box appears.
4. Click the Add Field link.
5. Select the required field from the secondary record.
6. Manually enter (+) after the field name.
7. Click OK.

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 70.](#)

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 complete 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 no matches are 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 that you want to add.
The Query page appears.
4. Select the appropriate fields to add to the query.
5. Navigate to the Records page.
6. Find the joining record and then click the Join Record link on the same row as that record.
7. Select Join to get additional fields only (Left outer join).

Note. When you select Left outer join, you must select the last record that you've previously added to the query. If you attempt to join to records other than the last record, an error message appears.

8. Complete the join.
 - If the Enable Auto Join preference is selected in the Query Preference page, click the record name to join with.
 - If the Enable Auto Join preference is not selected in the Query Preference page, click OK.
9. Define the join criteria.
 - If the Enable Auto Join preference is selected, the Auto Join Criteria page appears.
You can clear the criteria from the query. You can also click the Add Criteria button to add or edit criteria or conditions (2–3 tier client only). If no common keys are between the two join records, a message appears instead of the Add Criteria page.

- If the Enable Auto Join preference is not selected, the Auto Join Criteria page does *not* appear.
If you want, 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.

10. Define the effective date criteria.

- For 2–3 tier client: If the joined record is an effective-dated record, the Effective Date Criteria page appears.
You can accept the defaults or change them as desired.
- For 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.

Optionally, you can navigate to the Criteria page to change the defaults for this criteria.

11. To ensure that the left outer join finished successfully, navigate to the Query page.

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

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
(P.SROLEUSER 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.*

Note. Use the `SELECT DISTINCT` operation when you create a left outer join on two records with two separate security records. Using the `SELECT` operation in this case will cause the query to pull in too many records.

PeopleSoft Query automatically includes an `OR IS NULL` condition to make sure all relevant records are included.

Adding Left Outer Joins Criteria into the ON Clause

If you want to create criteria for the left outer joined record, you can add left outer joins criteria into the ON clause.

To create left outer joins criteria into the ON clause:

1. On the Criteria page, click the Edit button to access the Edit Criteria Properties page.
2. On the Edit Criteria Properties page, select *ON clause of outer join* <Alias Name> from the This Criteria Belongs To drop-down list box.
3. Click OK.

APPENDIX A

Creating Workflow Queries

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

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 the user who is running a workflow query can 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

*Query: QE_EMPLOYEE

Description: QE Employee Info

Folder:

*Query Type: User

*Owner: Public ☐ Distinct

Query Definition:

Last Updated Date/Time: 01/30/2007 2:30:45PM

Last Update User ID: QEDMO

OK Cancel

Query Properties page

To define a workflow query:

1. Select Reporting Tools, Query, Query Manager.
2. On a Query Manager page, click the Properties link.
The Query Properties page appears.
3. Select the query type of *Role*, and click OK.

Note. You should use a naming convention to distinguish the different types of queries.

The Role query option refers to the fact that role queries are named with names that begin with [ROLE].

See [Chapter 2, “Creating and Running Simple Queries,” Understanding Query Types, page 5](#).

See Also

[Appendix B, “PeopleSoft Query Security,” Using Query Profiles, page 80](#)

[Chapter 2, “Creating and Running Simple Queries,” Understanding Query Types, page 5](#)

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 only from 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.

Pages Used to Create Query Trees

Page Name	Object Name	Navigation	Usage
Query Access Manager	PSTREEMGRACC	PeopleTools, Security, Query Security, Query Access Manager	Create query trees or search for existing query trees.

Creating Query Trees

Access the Query Access Manager page.

The screenshot displays the 'Query Access Manager' interface. At the top, it shows the 'Effective Date' as 01/01/1900 and the 'Status' as 'Active' and 'Valid Tree'. Below this, the 'Tree Name' is 'QE_QRY_TREE' and it is 'Used in Query Manager security'. A navigation bar includes links for 'Save As', 'Close', 'Tree Definition', 'Display Options', and 'Print Format'. The main content area shows a tree structure for 'PT_ACCESS_GROUP > OPTIMIZATION'. The tree is expanded to show 'OPTIMIZATION - Optimization' with a plus icon. Below this, there are several sub-items: 'PORTAL - Portal' (with a plus icon), 'PSPRSMPerm - Portal Structure Permission', 'PSPRSMATTRVAL - Portal Attr Value Tbl', 'PSPRSMATTR - Portal Attribute Table', 'PSPRDMCNPTRV - Portal Content Provider Tbl', 'PSPRSMDEFN - Portal Structure Defn Tbl', and 'PSPRDMDEFN - Portal Definition Table'. Further down, there are 'BUSINESS_INTERLINK - Business Interlinks' and 'GLOBAL_TIME - Time Definitions'. The interface also includes a 'Find' bar and pagination controls showing 'First Page', '40 of 846', and 'Last Page'.

Query Access Manager page — example of a query access group tree

PeopleSoft provides sample trees with all of its applications. You can configure these trees; however, because these trees may get replaced when you upgrade to subsequent application releases, you should 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. Note that 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 while adapting 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 resources, general ledger, and projects record components so that users in each region can access only those record components that they use.

When creating your tree, you should also have an access group that includes all components of the tree. This enables you to give users access to all tables more easily—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. Although you do not have to organize records in 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

After you have 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 that are used in the queries. After you have 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 Permission List Access Groups page (by selecting PeopleTools, Security, Permission & Roles, Permission Lists, Query, Access Group Permissions).

See Also

Enterprise PeopleTools 8.49 PeopleBook: Security Administration, “Setting Up Permission Lists,” Setting Query Permissions

Enabling the Query Access List Cache

An optional batch process is available for users who work with Query Manager, Crystal Reports, and PS/nVision. The system can much more quickly retrieve the queries that match the designated search criteria if the query access list cache is enabled.

Query Access List Cache

Run Control ID: PSQRYACCLIST

[Report Manager](#)
[Process Monitor](#)
Run

☐ **Enable Access List Cache**

When this radio button is selected, the query access list cache is enabled. Use the run button above to launch the application engine program to initially populate or to refresh the query access list cache table. This cache table must be refreshed anytime a change is made that affects the list of records a user may use in a query. Examples of changes that may affect the list of records a user may use in a query are: adding/removing records from a query access list tree, adding/removing a query access list tree from a permission list or a role

☒ **Disable Access List Cache**

When this radio button is selected, the query access list cache table will be cleared if it is not empty and caching is disabled. Note that query performance may suffer if caching is disabled. To turn caching back on, select the enable cache radio button above and then the run button to populate the cache table. Note that caching will not be enabled if the application engine process to populate the cache does not complete properly.

Query Access List Cache page

To enable the query access list cache:

1. Select PeopleTools, Security, Query Security, Query Access List Cache.
2. Select the Enable Access List Cache option.

3. Click the Run button to run the process.

If the process does not finish, 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 can access all the rows of data in the table that were 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. That is, you want to enforce the *row-level security* feature that is 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) that is 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 that 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 by selecting an appropriate view from the Query Security Record drop-down list box on the Record Properties dialog box for any record definition.

The image shows a 'Record Properties' dialog box with two tabs: 'General' and 'Use'. The 'General' tab is active. It contains several sections:

- Set Control Field:** A dropdown menu.
- Record Relationships:**
 - Parent Record: `QE_PERS_DATA`
 - Related Language Record: (empty dropdown)
 - Query Security Record: `QE_PERS_SRCH`
 - Analytic Delete Record: (empty dropdown)
- Record Audit:**
 - Record Name: (empty dropdown)
 - Audit Options:**
 - ☐ Add
 - ☐ Change
 - ☐ Selective
 - ☐ Delete
- Record-level Auto-Update:**
 - System ID Field: `None`
 - Timestamp Field: `None`
- Sync type (MSF):**
 - ☐ Server -> User (Down Sync)
 - ☐ User -> Server (Up Sync)
- Record Information:**
 - ☐ Tools Table
 - ☐ Managed
- ☐ Append All (Dynamic Views)

At the bottom are 'OK' and 'Cancel' buttons.

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 and modifying these queries based on query profile settings that are assigned to a permission list. 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 criteria:

- 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 you add one of the preceding fields 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. The PeopleSoft 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.

Using Query Profiles

Use the Query Profile page to determine users' level of access when they work with PeopleSoft Query.

Permission List: PTPT1000	
Description: PeopleSoft User	
PeopleSoft Query Use ☐ Only Allowed to run Queries ☒ Allow creation of Public Queries ☒ Allow creation of Role, Process and Archive Queries Maximum Rows Fetched: (0 = Unlimited) Maximum Run Time in Minutes: (0 = Unlimited)	Advanced SQL Options ☒ Allow use of Distinct ☒ Allow use of 'Any Join' ☒ Allow use of Subquery/Exists ☒ Allow use of Union ☒ Allow use of Expressions Maximum Joins Allowed: 9 (9 = Unlimited) Maximum 'In Tree' Criteria: 9 (9 = Unlimited)
PeopleSoft Query Output ☒ Run ☒ Run to Excel	
OK Cancel	

Security, query profile page

To use query profiles:

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

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

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

See *Enterprise PeopleTools 8.49 PeopleBook: Security Administration*, "Setting Up Permission Lists," Setting General Permissions.

Note. All time-outs are globally enabled and disabled in Query Administration.

See [Appendix C, "Query Administration," Understanding Query Administration, page 83](#).

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 that 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 need 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 or role has the possibility to add capabilities. However, the 'Only Allowed to Run Queries' option is unique because when you select this option, capabilities are removed. So if you want to prevent users from updating queries (and allow them only to run them), then you must ensure that *none* of the permission list settings grant the update capabilities by clearing the 'Only Allowed to Run Queries' 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 8.49 PeopleBook: Security Administration, “Implementing Query Security”

APPENDIX C

Query Administration

This appendix provides an overview of Query Administration and discusses how to use Query Administration.

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 because of the large volume that can be run as part of workflow processing. Therefore, you should take care that workflow queries are as efficient as possible.

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

Note. You cannot cancel currently running scheduled queries.

See Also

[Appendix B, “PeopleSoft Query Security,” Using Query Profiles, page 80](#)

Using Query Administration

This section discusses how to:

- Administer queries.
- Cancel currently running queries.
- Set additional options.

Pages Used for Query Administration

Page Name	Object Name	Navigation	Usage
Admin (Administration)	QRY_ADMIN	PeopleTools, Utilities, Administration, Query Administration	Administer queries.
Executing	QRY_KILL	PeopleTools, Utilities, Administration, Query Administration, Executing	Cancel currently running queries, and enable or disable queries and logging.
Settings	QRY_SETTINGS	PeopleTools, Utilities, Administration, Query Administration, Settings	Set additional options such as enabling the query time-out feature and running query statistics.

Administering Queries

Access the Admin page.

Admin page

To administer queries:

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

For a predefined search, enter the desired value for the selected search option in the (n)= field and 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.*

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

You can define your search further by selecting 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 that is 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 clear statistics only 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 SQL for that query.

6. Select the check box for each query on which you want to perform an action.

You can also click the Check All button to select all queries, or click the Uncheck All button to clear 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: Disables the selected query from being run, previewed, or scheduled.
- Assigns New Owner: Assign a new owner to the selected query.
- Delete: Deletes the selected query.
- Rename: Renames the selected query.
- Move to Folder: Moves the selected query to a folder.
- Clears Stats/Logs: Delete the statistics and logs for the selected query.

8. For the appropriate query, click the Logging button to enable logging for that query.

Note. Your changes are saved automatically. No Save button is available.

Canceling 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 canceled, he or she can look in the Appsrv.log and verify that the *PSMONITORSRV* service has canceled 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 the value that you want 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 selecting 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 that is listed:

- User ID.
- Owner ID.
- Query name.
- Domain ID.
- Process identifier.
- Host.
- Machine name.
- Status.
- Time started.
- Time-out 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 SQL for that query.
 7. Select the check box for each query on which you want to perform an action.
You can also click the Check All button to select all queries, or click the Uncheck All button to clear 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 enable logging, detailed statistics are 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: Enables the selected query to be run, previewed, or scheduled.
 - Disable: Disables 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.

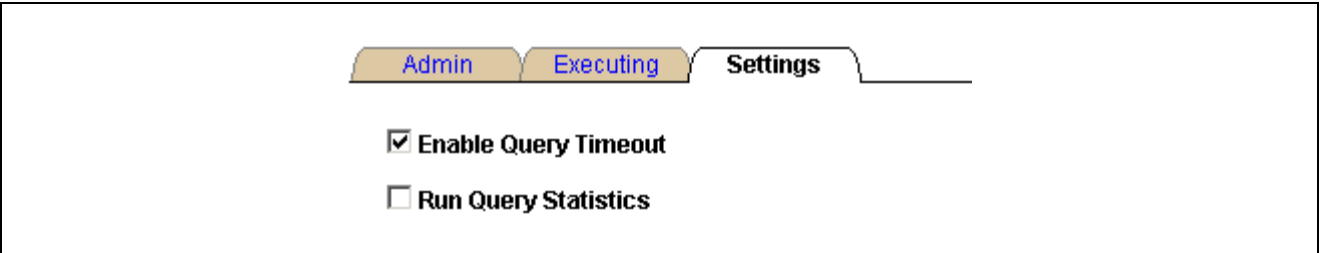
Note. Your changes are saved automatically. No Save button is available.

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 looks for orphan rows only for the application server domain that it is running in. For this reason, orphan rows could be in PSQRYTRANS when no active domain exists. These rows are not seen by the online query monitoring facility, but could potentially exist in the database. Such rows are rare, and you can use the database query tool to clean them up. You can use the *machine* and *domain* fields to determine whether rows exist that should be cleaned up.

Setting Additional Options

Access the Settings page.



The screenshot shows a web interface with three tabs: "Admin", "Executing", and "Settings". The "Settings" tab is active. Below the tabs, there are two checkboxes:

- ☒ Enable Query Timeout
- ☐ Run Query Statistics

Settings page

Enable Query Timeout

Select or clear this check box to enable or disable the query timeout feature on a system-wide 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 this check box to enable or disable the query statistics feature on a system-wide basis.

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

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

Glossary of PeopleSoft Enterprise 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.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
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 Enterprise Human Resources, PeopleSoft Enterprise Benefits

	Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Enterprise 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 Enterprise 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.
address usage	In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.
adjustment calendar	In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.
administrative function	In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.
admit type	In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.
agreement	In PeopleSoft Enterprise 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 Enterprise 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.
analysis database	In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered

	for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.
Application Messaging	PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.
assessment rule	In PeopleSoft Enterprise 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 Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree.
auction event	In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.
audience	In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
bid response	In PeopleSoft Strategic Sourcing, the response by a bidder to an event.
billing career	In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.
bio bit or bio brief	In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.
book	In PeopleSoft Enterprise 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 activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
business event	In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. In PeopleSoft Enterprise 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 process	A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also <i>detailed business process</i>.
business unit constraints	In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.
business task	The name of the specific function depicted in one of the business processes.
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 Enterprise 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.
buy event	In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction. For bidders, the sale of goods or services.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
cash drawer	A repository for monies and payments taken locally.
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 Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog.

catalog partner	In PeopleSoft Enterprise 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.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
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 Enterprise 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 Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
claimback	In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.
class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> .
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 <i>sub-classification</i> .
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> .

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, PeopleTools maintains a set of collections (one per language code) for each search index object.
collection rule	In PeopleSoft Enterprise 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.
comm key	See <i>communication key</i> .
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.
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.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client.
condition	In PeopleSoft Enterprise 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 Enterprise. 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.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
constraint	A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.
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 Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to

	3C access groups so that you can assign data-entry or view-only privileges across functions.
	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 plus contract line	A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines.
cost plus pricing	In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.
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.
counter sale	A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab. See also <i>class</i> .
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.
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 cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
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 Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). 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.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
direct receipt	Items shipped from a warehouse or vendor to another warehouse.
direct ship	Items shipped from the vendor or warehouse directly to the customer (formerly referred to as <i>drop ship</i>).
directory information tree	In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure.
division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>cohort</i>.
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 Enterprise 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 Enterprise 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 <i>Enterprise Incentive Management ledger</i> . 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 Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft Enterprise 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 Enterprise 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.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
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 Enterprise Human Resources, also refers to an incident that affects benefits eligibility.
event constraints	In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.
event propagation process	In PeopleSoft Enterprise 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. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Enterprise 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 Enterprise 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.
financial aid term	In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.
financial sanctions	For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment. For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).
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 Enterprise 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.
gap	In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.
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.
gift table	In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GDS	Abbreviation for <i>Global Distribution System</i> . Broad-based term to describe all computer reservation systems for making travel plans.
GL business unit	Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> .
GL entry template	Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
global constraints	In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.
group	In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Enterprise 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 Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes.
ideal response	In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.
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, and user interaction objects.

incentive rule	In PeopleSoft Enterprise 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 Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
initiative	In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.
inquiry access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data. See also <i>update access</i> .
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software.
integration point	An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application.
integration set	A logical grouping of integrations that applications use for the same business purpose. For example, the integration set <code>ADVANCED_SHIPPING_ORDER</code> contains all of the integrations that notify a customer that an order has shipped.
item	In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Enterprise 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 Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
item shuffle	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.
itinerary	In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as <i>pending reservations</i> . Reservations that have been paid for are referred to as <i>confirmed reservations</i> .
joint communication	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.

keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.
KPI	An abbreviation for <i>key performance indicator</i> . 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.
KVI	Abbreviation for <i>Known Value Item</i> . Term used for products or groups of products where the selling price cannot be reduced or increased.
landlord	In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.
LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft Enterprise 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.
lease	In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.
lease abstract	In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.
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 <i>rates</i>) 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.
line	In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

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.
LMS	Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.
load	In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft Enterprise 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 <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Enterprise 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.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> .
match group	In PeopleSoft Enterprise 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 <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Enterprise 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 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 Enterprise 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 Enterprise 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.
NDP	Abbreviation for <i>Non-Discountable Products</i> . Term used for products or groups of products where the selling price cannot be decreased.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
Optimization Engine	A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.
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 Enterprise and non-PeopleSoft Enterprise 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 <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
payment shuffle	In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.
pending item	In PeopleSoft Enterprise 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 Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed.
PeopleCode event	See <i>event</i> .
PeopleSoft Pure 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.
person of interest	A person about whom the organization maintains information but who is not part of the workforce.
personal portfolio	In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.
phase	A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.
pickup quantity	The product quantity that the customer is taking with them from the counter sales environment.
plan	In PeopleSoft Enterprise 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 Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and

	Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> .
portal registry	In PeopleSoft Enterprise 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.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	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	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 conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	The fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Enterprise 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	A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number.
product adds	The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as <i>giveaways</i>).
product bidding	In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners.
product line	The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
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 Enterprise 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 Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
proxy bidding	In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
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 <i>record input value-added tax flag</i> . Within PeopleSoft Enterprise 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 Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
reference data	In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels.
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 Enterprise 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 <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
reservations	In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
RFI event	In PeopleSoft Strategic Sourcing, a request for information.
RFx event	In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.
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.
saved bid	In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.
score	In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.
SCP SCBM XML message	Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
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.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.

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.
sell event	In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.
serial genealogy	In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
session	In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements. 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 Enterprise 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.
short-term customer	A customer not in the system who is entered during sales order entry using a template.

single signon	With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password.
source key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
source transaction	In commitment control, any transaction generated in a PeopleSoft Enterprise 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.
sourcing objective	For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).
speed key	See <i>communication key</i> .
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.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Enterprise 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 Enterprise 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 <i>basis</i> 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 Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger.
system source	The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch). When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).
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.
task	A deliverable item on the detailed sourcing plan.
tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
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 Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
tenant	In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.
territory	In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
third party	A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications.
tiered pricing	Enables different portions of a schedule to be priced differently from one another.
time span	A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.
total cost	In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

travel group	In PeopleSoft Expenses, the organization's travel rules and policies that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.
travel partner	In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
trace usage	In PeopleSoft Enterprise 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 Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.
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 Enterprise 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.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.

See also *inquiry access*.

user interaction object	In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise 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 Enterprise 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 <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This term refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . 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 <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
weight or weighting	In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.
work order	In PeopleSoft Enterprise 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.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
worksheet	A way of presenting data through a PeopleSoft Enterprise 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 link	The XML Linking language enables you to insert elements into XML documents to create a links between resources.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
XPI	Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications.

yield by operation

In PeopleSoft Enterprise 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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