
PeopleTools 8.62: Query

July 2025

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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the [Oracle Help Center](#). The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see [Configuring Context-Sensitive Help Using the Hosted Online Help Website](#).

Locally Installed PeopleSoft Online Help

If you're setting up an on-premises PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. Installable PeopleSoft Online Help is made available with selected PeopleSoft Update Images and with PeopleTools releases for on-premises installations, through the [Oracle Software Delivery Cloud](#).

Your installation documentation includes a chapter with instructions for how to install the online help for your business environment, and the documentation zip file may contain a README.txt file with additional installation instructions. See *PeopleSoft 9.2 Application Installation* for your database platform, "Installing PeopleSoft Online Help."

To configure the context-sensitive help for your PeopleSoft applications to use a locally installed online help website, see [Configuring Context-Sensitive Help Using a Locally Installed Online Help Website](#).

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the [Oracle Help Center](#). The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals

- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

<i>Typographical Convention</i>	<i>Description</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.
... (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 ().
[] (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.

<i>Typographical Convention</i>	<i>Description</i>
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

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

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

Information that applies only to a specific 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 region-specific heading: "(Latin America) Setting Up Depreciation"

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- 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 the PeopleSoft Online Help:

- USF (U.S. Federal)

- E&G (Education and Government)

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help.
- Managing hosted Online Help.
- Managing locally installed PeopleSoft Online Help.

PeopleTools Related Links

[PeopleTools 8.62 Home Page](#)

[PeopleSoft Search and Insights Home Page](#)

“PeopleTools Product/Feature PeopleBook Index” (Getting Started with PeopleTools)

[PeopleSoft Online Help](#)

[PeopleSoft Information Portal](#)

[PeopleSoft Spotlight Series](#)

[PeopleSoft Training and Certification | Oracle University](#)

[My Oracle Support](#)

[Oracle Help Center](#)

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Send your suggestions to pssoft-infodev_us@oracle.com.

Please include the applications update image or PeopleTools release that you’re using.

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Getting Started with PeopleSoft Query

PeopleSoft Query Overview

PeopleSoft Query is an end user reporting tool. With PeopleSoft Query, you can extract the precise information that you are looking for by using visual representations of your PeopleSoft database, without writing 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. This document 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 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.

Note: PeopleTools delivers components, which are Classic Plus enabled. However, PeopleTools only upgrade will not set Classic Plus as the default branding.

Applications will set the system level branding as Classic Plus in the Branding System Options page. Query components which are classic plus enabled are listed in the topic “PeopleTools Components Delivered as Classic Plus” (Portal Technology).

You can use PeopleSoft Query in the following ways:

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

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 [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 and XML.

You can have the data downloaded and formatted as a Microsoft Excel spreadsheet and XML. These options are available in your query search results, or after you run or schedule a query.

- 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*.

- To create a data source for PeopleSoft nVision reports.

PeopleSoft nVision reports can use queries as a data source.

- To serve as a data source for Pivot Grid models.

Queries are a primary data source for PeopleSoft Pivot Grid, which you can use to build Pivot Grid models.

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

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

- To serve as a data source of the same name for Oracle BI Publisher (formally PeopleSoft XML Publisher).

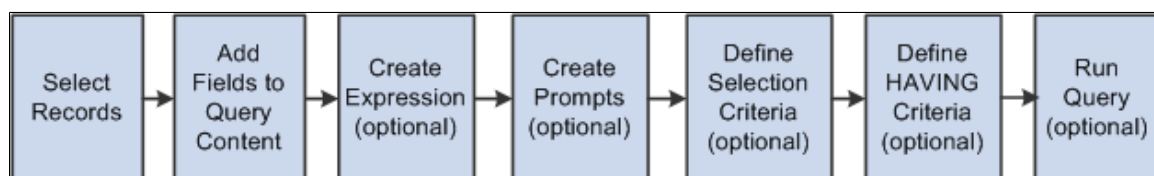
With BI Publisher, you can apply advanced formatting to the output of your queries and streamline report and form generation.

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

Note: Because PSQUERY is confined by the query limitations that are imposed by the platform on which PSQUERY runs, invalid queries that result in database errors will also result in errors when constructed and run through PSQUERY.

PeopleSoft Query Business Processes

This process flow illustrates the PeopleSoft Query business processes.



Other Sources of Information

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

In addition to implementation considerations presented in these topics, take advantage of all PeopleSoft sources of information, including the installation guides, release notes, product documentations, red papers, the **Updates + Fixes** area of My Oracle Support, and PeopleSoft's curriculum courses.

Related Links

“PeopleTools Overview” (Getting Started with PeopleTools)

PeopleSoft Query Implementation

PeopleSoft Query is automatically installed with your Oracle's PeopleTools installation. Before using PeopleSoft Query, you must set up query security.

Step	Reference
1. Define query profiles.	See “Defining Query Profiles” (Security Administration).
2. Build query access group trees.	See “Building Query Access Group Trees” (Security Administration).
3. Work with query trees.	See “Working with Query Trees” (Security Administration).
4. Define row-level security and query security records.	See “Defining Row-Level Security and Query Security Records” (Security Administration).

Creating and Running Simple Queries

Understanding Query Types

PeopleSoft Query provides the following different types of queries:

<i>Term</i>	<i>Definition</i>
User query	User queries retrieve data from the database directly from Windows-based Query Designer or the web-based Query Manager and 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. Oracle PeopleSoft currently supports the Windows-based Query Designer, but we no longer enhance this version. Since PeopleTools 8.50, all enhancements such as new features or functionality are added only to Query Manager and Query Viewer applications. There are two usage types of User query: • Reporting query • PS/nVision query

Term	Definition
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, Connected Query, Composite Query, Pivot Grid, PS/nVision, Cube Manager, or BI 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 Defining Criteria , “Adding New Process Definitions” (Process Scheduler).
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 Working with Aggregate Functions, Working with Subqueries, Working with Unions, Joining Records, “Understanding Layouts” (PS/nVision).

Term	Definition
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 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 or 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 runtime. The bind variable or variables correspond to the data on which you want to base the routing decision. At runtime, 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. See “Understanding PeopleSoft Workflow” (Workflow Technology) .

Term	Definition
Archive query	You can save a query as an archive query if you have access to workflow queries that include <i>Archive Query</i>, <i>Role Query</i>, and <i>Process Query</i>. These queries are generally only used by the PeopleSoft Data Archive Manager. See “Understanding PeopleSoft Data Archive Manager” (Data Management). Note: You can only create and save archive queries as <i>public</i>.

Understanding 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.

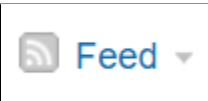
Related Links

“Use Dirty-Read” (System and Server Administration)

“Setting Parameters for the Application Engine Server” (Process Scheduler)

Common Elements Used to Create and Run Simple Queries

Field or Control	Description
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	<i>New Unsaved Query</i> 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.

Field or Control	Description
Record.FieldName	Displays the record alias and name for each field listed. Note: You can select and add up to 676 records for each query. The record alias goes from A to Z for record number 1 to record number 26. When you add record number 27 and after, the record alias starts at AA and follows the pattern AB, AC, AD, and so on. The record alias doesn't include AS and TO, and ends with ZX, ZY, ZZ.
	The Key icon 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 or 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.
	Hover over to view the feeds of this query. See “Understanding Query Feeds” (Feed Publishing Framework) .
Save	Click to save a query at any time after you have selected one record and at least one field for it. See Saving Queries, Updating Existing Queries.
Save As	Click to access the Query Properties page where you can enter basic information about the query and save it. See Saving Queries, Updating Existing Queries.
New Query	Click to access the PeopleSoft Query Manager where you can start creating a new query. See Creating New Queries.

Field or Control	Description
Preference	Click to access the Preference page where you can specify query preferences. See Specifying Query Preferences.
Properties	Click to access the Query Properties page where you can view and edit data about the current query, such as the query name and description. You can also record information about your query so that you can use it again in the future. In addition, you can define how images are displayed in the query results. See Viewing and Editing Query Properties.
Public As Feed	This link is available only when query was not published as feed. Click to access the PSQuery Data Type - Publish Feed Definition page where you can define feed properties such as the feed title, security, and other options. See “Understanding Query Feeds” (Feed Publishing Framework).
Manage Feed	This link is available only when query was published as feed. Click to access the PSQuery Data Type - Publish as Feed page where you can define feed properties such as the feed title, security, and other options. See “Understanding Query Feeds” (Feed Publishing Framework).
Publish as Pivot Grid	Click to display all existing Pivot Grid models that use the current query as the data source. You also have the options to either edit the existing Pivot Grid models or add new ones. If you add a new model, a unique title name must be provided. Similar to the Pivot Grid Wizard, this feature enables you to open and edit the Pivot Grid models for which you are granted permission. The security access for using this feature is the same as using Pivot Grid Wizard. See “Creating Pivot Grid Models Using Query Manager” (Pivot Grid).
New Union	This link is available only when query does not have union. Click to create an union of multiple queries. See Working with Unions.

Field or Control	Description
Delete Union	This link is available only when a query has a union attached. Click to delete an existing union of multiple queries. See Working with Unions .
Return to Search	Click to return to the Query Manager search page where you can create new queries, modify existing queries, schedule queries, and organize queries. See Modifying Queries , Scheduling Queries , Organizing Queries .

Creating New Queries

Specifying Query Preferences

Use the Query Preferences page to (QRY_PREFERENCES) specify query preferences.

Navigation:

To access the Query Preferences page:

1. Select **Reporting Tools > Query > Query Manager**.
2. Create a new query or search for an existing one.
3. Access the Query Preferences page by clicking the **Preferences** link on any page of the Query Manager component (except the Run page).

This example illustrates the fields and controls on the Query Preferences page. Definitions for the fields and controls appear following the example.

Query Preferences

×

Help

*Name Style:

Name and Description

▼

☒ Enable Auto Join

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

OK

Cancel

Field or Control	Description
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.

Related Links

- Selecting Records
- Adding Fields to Query Content
- Previewing Query Results Prior to Saving

Selecting Records

Use the Records page (QRY_RECORDS) to select the records upon which to base the new query.

Navigation:

To access the Records page:

1. Select **Reporting Tools** > **Query** > **Query Manager**.
2. Click the **Create New Query** link.
3. Click the **Search** button.

This example illustrates the fields and controls on the Records page.

The screenshot shows the 'Records' tab selected in the top navigation bar. Below the tabs, the 'Query Name' is 'QE_EMPLOYEE' and the 'Description' is 'QE Employee Info'. The search criteria are set to '*Search By' with a dropdown menu showing 'Record Name' and a text field 'begins with'. The 'Search' button is highlighted in yellow. Below the search bar, the 'Search Results' section displays a table with two records. The table has columns for 'Record', 'Recname', 'Join Record', and 'Show Fields'. The records are 'QE_ALL_JOBS_LV - Job Openings' and 'QE_ALL_JOBS_VW - Job Openings'. At the bottom of the page, there are several buttons: 'Save', 'Save As', 'New Query', 'Preferences', 'Properties', 'Publish as Feed', 'Publish as Pivot Grid', 'New Union', and a yellow 'Return To Search' button.

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 in the Records page:

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.

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 records from the list, use the navigation buttons and links located on the header bar. To display 100 records, select the **View 100** link, and use the scroll-bar to go through the rest of the list.

2. If you want to view a record's fields, click the **Show Fields** link 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. After viewing the fields, click the **Return** button to return to the Records page.
4. Click the **Add Record** link next to the record that you want to add to the query.

The **Query** page appears enabling you to select the 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.

Related Links

[Creating Any Record Joins](#)

Adding Fields to Query Content

Use the Query page (QRY_QUERY) to add fields to the query content and add additional records by performing joins.

Navigation:

To access the Query page:

1. Select **Reporting Tools > Query > Query Manager**.
2. Click the **Create New Query** link.
3. Click the **Search** button to find an existing record, and click the **Add Record** link for the desired record.

Note: 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 the OK button to close the page.

This example illustrates the fields and controls on the Query page. Definitions for the fields and controls appear following the example.



Field or Control	Description
	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 selected records. Note: You can select and add up to 676 records for each query. The record alias goes from A to Z for record number 1 to record number 26. When you add record number 27 and after, the record alias starts at AA and follows the pattern AB, AC, AD, and so on. The record alias doesn't include AS and TO, and ends with ZX, ZY, and ZZ.
Hierarchy Join	Click this link to join a child table to its parent table.
Check All	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.

Field or Control	Description
Uncheck All	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.
Join <record name>	Click the related record join link to join two records that are based on a shared field. For example, in the above example, the QE_DEPT_TBL record is related to the QE_EMPLOYEE record by the DEPTID field.
Expand All Records	Click this button to view all fields in the records This button appears only when there is more than one record listed.
Collapse All Records	Click this button to hide all fields in the records. This button appears only when there is more than one record listed.

In the Query page, to add fields to your query:

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

Related Links

[Joining Records](#)

Viewing Fields Selected for Output

Use the Fields page (QRY_FIELDS) to view how fields are selected for output and the properties of each field. You can also change headings, order-by numbers, and aggregate values.

Navigation:

To access the Fields page:

1. Select **Reporting Tools > Query > Query Manager**.
2. Click the **Create New Query** link.
3. Click the **Search** button to find an existing record.
4. Click the **Add Record** link for the desired record.

5. Select the desired fields, and then select the Fields tab.

This example illustrates the fields and controls on the Fields page. Definitions for the fields and controls appear following the example.

RecordsQueryExpressionsPromptsFieldsCriteriaHavingDependencyTransformationsView SQLRun

Query NameQE_EMPLOYEEDescriptionQE Employee InfoFeed

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

Fields

PersonalizeFindView AllFirst1-8 of 8Last

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.EMPLID - Empl ID	Char11	1			ID		Edit	
2	A.EFFDT - Effective Date	Date	3			Eff Date		Edit	
3	A.QE_EMPLOYEE_NAME - Employee Name	Char60	2			Name		Edit	
4	A.QE_FIRST_NAME - First Name	Char50				First		Edit	
5	A.QE_LAST_NAME - Last Name	Char30				Last		Edit	
6	A.QE_SOC_SEC_NBR - Social Security Number	Char9				SSN		Edit	
7	A.QE_JOBCODE - JobCode	Char6				JobCode		Edit	
8	A.DEPTID - Department	Char10				Dept		Edit	

SaveSave AsNew QueryPreferencesPropertiesPublish as FeedPublish as Pivot GridNew Union

Return To Search

Field or Control	Description
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 <i>1</i> 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 <i>D</i> appears if you are sorting fields in descending order.

Field or Control	Description
XLAT (translate)	Specifies the translate value that you want to appear in the query results: <i>N</i> (none), <i>S</i> (short), or <i>L</i> (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 <i>A</i> or <i>I</i>, which the Translate table translates into <i>Active</i> and <i>Inactive</i>. 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, <i>Active</i> instead of <i>A</i>). To instruct PeopleSoft Query to make this substitution, specify <i>L</i> 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.
Add Criteria	Select the Add Criteria icon to access the Edit Criteria Properties page, where you can edit selection criteria properties for your query statement. See Defining Criteria

Field or Control	Description
Edit	Click this button to display the Edit Field Properties page. See Viewing and Editing Query Properties .
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

Use the Edit Field Ordering page (QRY_FIELDS_ORDER) to change the column and sort order for multiple fields.

Navigation:

To access the Edit Field Ordering page:

1. Select **Reporting Tools > Query > Query Manager**.
2. Create a new query or search for an existing one.
3. Select the Fields tab, and click the **Reorder/Sort** button.

This example illustrates the fields and controls on the Edit Field Ordering page. Definitions for the fields and controls appear following the example.

Edit Field Ordering

[Help](#)

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					
Personalize Find View All					
First 1-8 of 8 Last					
New Column	Column	Record.FieldName	Order By	Descending	New Order By
	1	A.EMPLID - Empl ID	1	☐	1
	2	A.EFFDT - Effective Date	3	☐	3
	3	A.QE_EMPLOYEE_NAME - Employee Name	2	☐	2
	4	A.QE_FIRST_NAME - First Name		☐	
	5	A.QE_LAST_NAME - Last Name		☐	
	6	A.QE_SOC_SEC_NBR - Social Security Number		☐	
	7	A.QE_JOBCODE - JobCode		☐	
	8	A.DEPTID - Department		☐	

Field or Control	Description
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.
Column	By default, the fields appear in the same order as they are listed in the record on the Query page.
Order By	Indicates current sort order.
Descending	Select this check box to sort fields in the 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

Use the Edit Field Properties page (QRY_FIELDS_SEC) to format the query output; for example, to change column headings or display translate table values in place of codes.

Navigation:

To access the Edit Field Properties page:

1. Select **Reporting Tools > Query > Query Manager**.
2. Create a new query or search for an existing one.
3. Select the Fields tab, and then click an appropriate **Edit** button.

This example illustrates the fields and controls on the Edit Field Properties page. Definitions for the fields and controls appear following the example.

Edit Field Properties

Field Name A.EMPLID - Empl ID

Heading

☐ No Heading

☒ RFT Short

☐ Text

☐ RFT Long

Heading Text

ID

*Unique Field Name

A.EMPLID

Aggregate

☒ None

☐ Sum

☐ Count

☐ Min

☐ Max

☐ Average

Field or Control	Description
Field Name	The name of the field for which you are editing properties.
Heading	Select a column heading from the following options: <i>No Heading</i>: The column does not have a heading. <i>Text</i>: Select this option and enter the column heading text in the Heading 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 the alias for the record followed by the record field name (for example, A.NAME or B.EMPLID).

Field or Control	Description
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: query is not using 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.

Related Links

[Working with Aggregate Functions](#)

Viewing and Editing Query Properties

Use the Query Properties page (QRY_PROPERTIES) to view and edit data about the current query such as the query name and description, record information about your query, and so on. You also use this page to define how the image fields are displayed in the query results.

Navigation:

To access the Query Properties page:

1. Select **Reporting Tools > Query > Query Manager**.
2. Create a new query or search for an existing one.
3. Click the **Properties** link on any page of the Query Manager component except the Run page.

This example illustrates the fields and controls on the Query Properties page. Definitions for the fields and controls appear following the example.

Query Properties

***Query:**

Description:

Folder:

***Query Type:**

***Owner:**

☐ Distinct ☐ Security Join Optimizer

Query Definition:

Image Fields

- ☐ Blank Value
- ☒ Image Data
- ☐ Image Hyperlink

Last Updated Date/Time: 06/26/2013 4:31:27PM

Last Update User ID: QE_CQ

Field or Control	Description
Query	Use this field to edit the name of the query. The field can take 30 characters. The name can contain US ASCII alphabetic and numeric characters, as well as underscores.
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 Understanding Query Types.

Field or Control	Description
Owner	Select from the following options: • <i>Private</i>: If you select this option, only the user 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 option 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 option, you receive each JOBCODE once. This option is not visible for union selections because unions are automatically distinct. Note: In Oracle databases, PeopleSoft LongCharacter fields use the CLOB data type when their length definition exceeds 1333. Since CLOBS and other binary data types are not valid columns for all operators, all queries including columns with LongCharacter field length definition that exceeds 1333 should not include the DISTINCT operator.
Security Join Optimizer	If the tables being joined in the current query are associated with the same query security record, use this option to determine whether the joins should be optimized. • Select this option to enable query to join once to the security record and use those results to filter all subsequent joins to that <i>same</i> security record. • Clear this option to enable query to join multiple times to the same security record. Note: For left outer joins, PSQuery uses either 'inner join' or 'in line view' (in the case of Oracle (+) proprietary syntax) logic to join the individual tables to their security records first, before performing the left outer join. In these cases, the Security Join Optimizer option is not applied to ensure the query returns correct results.
Query Definition	Free text area that you can use to further describe your query.

<i>Field or Control</i>	<i>Description</i>
Image Fields	Use this section to define how the image fields are displayed in the query results. The available options are: - Blank Value: Select this option to not display the images. - Image Data: Select this option to display embedded images (inline). Note: When Image Data option is selected, a query run to HTML output will display the images as embedded in the query results (inline). All other output formats will display the image field data as a Base64 encoded data string. - Image Hyperlink: Select this option to display the image field values as hyperlinks. When you click any of these image hyperlinks, the image is displayed in a new browser window. Note: The query image URL is distinct for each row in the result set; that is, the query image URL specifically returns the image corresponding with that particular row containing the URL.

Query Image Field Handling

Query supports the use of *image* fields in the query definition. Setting the *Image Fields* property under the Query Properties page determines how these field values are displayed in the Query result set. If the image field property is set to *Image Data*, the image field value (binary image) will be displayed as an embedded image in the result set when you run the query to HTML output format. If you run a query to any other type of format (for example, XML or TXT), a Base64 encoded data string representing the image will be displayed instead. When setting the property to *Image Hyperlink*, a URL will be returned in place of the field value. When accessed, this URL will return the image as an image file in a new browser window.

Regardless of how the query is run, whether through PSQuery API methods (RunToRowset, RunToFile, and so on) or through the Query Manager or Query Viewer page, the image fields are handled the same way.

Note: The above-mentioned image handling behavior applies to PeopleSoft *Image* type fields only. Although other field types such as *Long Character*, *Attachment*, and *Image Reference* are capable of storing image data, these field types are not handled by PSQuery in the same way.

Although all available Image Formats for an image field are supported for the query result set, only a subset of these formats can be successfully displayed as embedded images in Query HTML output. These are BMP, DIB, GIF, JPG, PNG and SVG.

Regardless of the size of the original image, the system resizes images to 100 pixels by 100 pixels in query output.

This example shows the query results after you run the query using the Run page in Query Manager, with the Image Fields property set to *Image Data*.

RecordsQueryExpressionsPromptsFieldsCriteriaHavingDependencyTransformationsView SQLRun

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

First 1-100 of 118 Last

	Photograph	Last Name	First Name	Base
1		Richardson	Daniel	TOR
2		Day	Annette	ATL
3		DeLange	Hutch	ATL
4		Nakisher	Harald	GER
5		Vincelette	Estelle	MEL

This example shows the query results after you run a query using the HTML link in Query Manager, with the Image Fields property set to *Image Hyperlink*.

KN_QE_QRY_IMAGELINK_PROP- image link property query

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (16 kb)

View All

ID	Emp	Eff Date	Name	SSN	JobCode	Dept
1 8052	http://islcd2off.us.oracle.com:8920/psco/OEDMO_4/EMPLOYEE/DE_LOCAL/q?iCAction=iCQrImageURL=PUBLIC:KN_QE_QRY_IMAGELINK_PROP&IMGFIELD=QE_QRY_PHOTO_BMP&IMGRECORD=QE_QRY_BMP2&EMPLID=8052	05/05/1997	Avery,Joan	111111111	6001	10200
2 8101	http://islcd2off.us.oracle.com:8920/psco/OEDMO_4/EMPLOYEE/DE_LOCAL/q?iCAction=iCQrImageURL=PUBLIC:KN_QE_QRY_IMAGELINK_PROP&IMGFIELD=QE_QRY_PHOTO_BMP&IMGRECORD=QE_QRY_BMP2&EMPLID=8101	05/05/1997	Penrose,Steven	302467012	6001	10200
3 8102	http://islcd2off.us.oracle.com:8920/psco/OEDMO_4/EMPLOYEE/DE_LOCAL/q?iCAction=iCQrImageURL=PUBLIC:KN_QE_QRY_IMAGELINK_PROP&IMGFIELD=QE_QRY_PHOTO_BMP&IMGRECORD=QE_QRY_BMP2&EMPLID=8102	05/05/1997	Sullivan,Theresa	349096896	6001	10200

Note: When accessing a Query Image URL (Image Hyperlink), users must be signed into the PeopleSoft PIA environment and have the permission to view the images. If you are not signed into PIA, the sign-in page appears asking for your authentication. If you don't have access to the images based on both Query Access List security and security joins defined by the underlying records in the query (row-level security), the required rows with image data are not returned and an error message appears.

Note: If you set the Image Fields section to *Image Data* for a query, its online performance can be impacted by the size of the images and the number of rows returned.

Related Links

[Defining Workflow Queries](#)

[Using Query Access Group Trees](#)

Using Row-Level Security and Query Security Record Definitions

Using Query Profiles

Editing Header or Footer Text

Use the Header page (QRY_HEADER) or the Footer page (QRY_FOOTER) to include a descriptive text in the header or footer area respectively on the Query HTML result page. These texts are used by query owners to provide additional information about the query that is run.

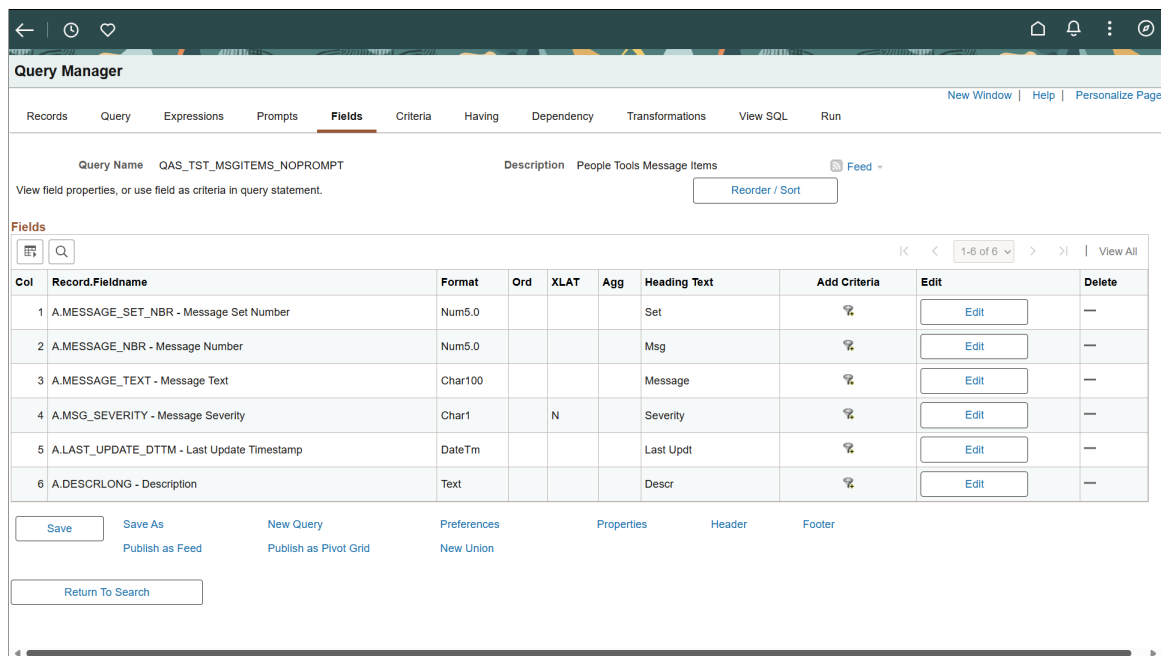
Query owners can include just one header and footer text in each query. The Header and Footer links open a page to set the query title text.

Navigation:

To access the Query HTML Header or Footer page:

1. Select **Reporting Tools > Query > Query Manager**.
2. Create a new query or search for an existing one.
3. Click the Header or Footer link on any page of the Query Manager component except the Run page.

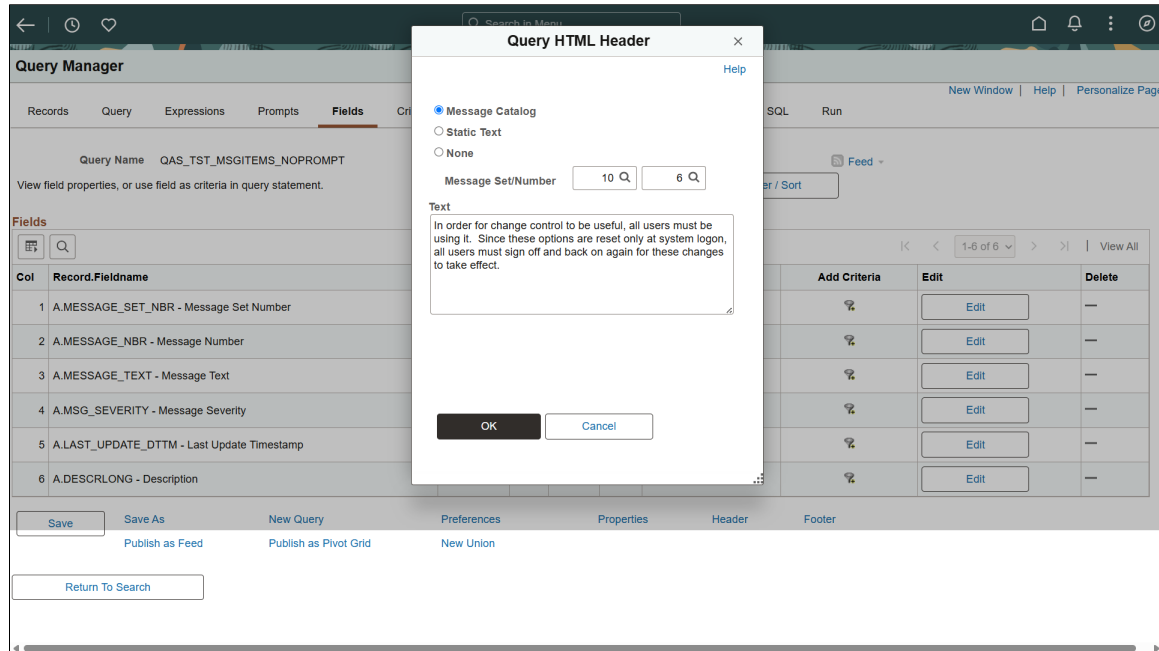
This example illustrates the Header and Footer links on the bottom of the Query Manager page.



On clicking the Header link, the Header page appears. To display a text message on the header region of a query result, select one of the following options:

- **Message Catalog:** Select this option to make the header text translatable. When you select Message Catalog, you can set the Message Set Number and Message Number properties.
- **Static Text:** Select this option if you do not require the message text to be translatable.
- **None:** This is the default option. Select this option if you do not wish to display any header text.

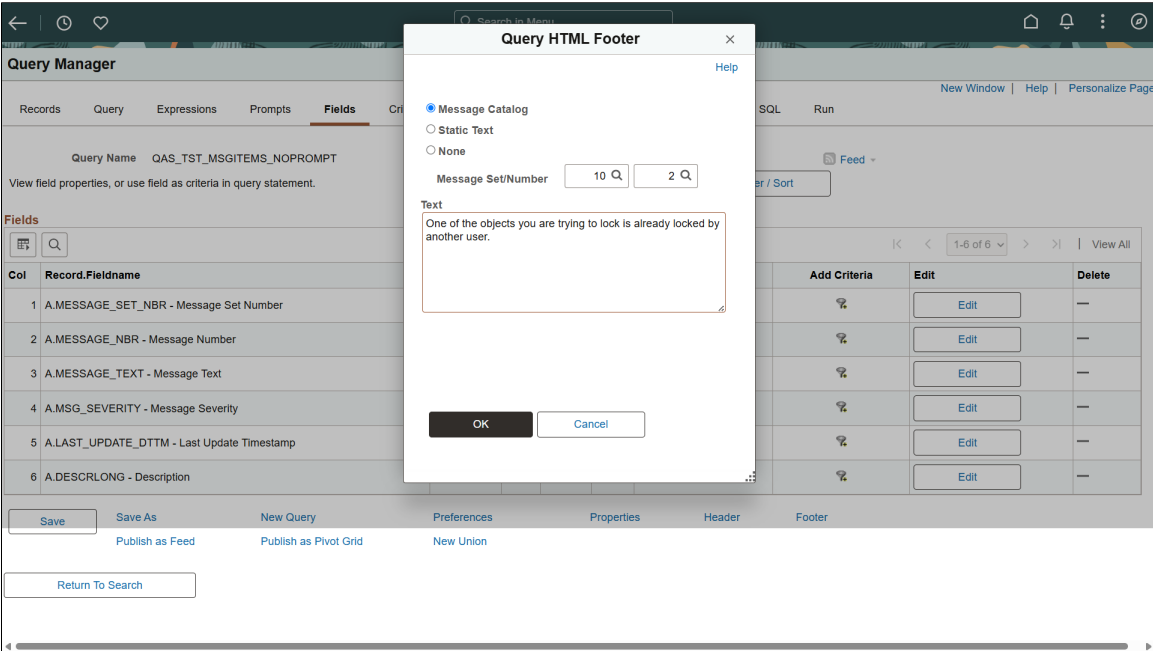
This example illustrates the fields and controls on the Header page.



On clicking the Footer link, the Footer page appears. To display a message on the footer of a query result, select one of the following options:

- **Message Catalog:** Select this option to make the footer text translatable. When you select Message Catalog, you can set the Message Set Number and Message Number properties.
- **Static Text:** Select this option if you do not require the message text to be translatable.
- **None:** This is the default option. Select this option if you do not wish to display any text on the footer of the query result.

This example illustrates the fields and controls on the Footer page.



This example illustrates the fields and controls on running a query with header and footer texts set from Message Catalog entries.

QAS_TST_MSGITEMS_NOPROMPT- People Tools Message Items									
In order for change control to be useful, all users must be using it. Since these options are reset only at system logon, all users must sign off and back on again for these changes to take effect.									
Download results in : Excel Spreadsheet CSV Text File XML File (8930 kb)									
View All									
								First 1-100 of 29767	Last
Row	Set	Msg	Message	Severity	Last Updt	Descr			
1	262	1137	SSL option	M	11/15/2016 12:36:11AM	Use Search server SSL if set to true			
2	262	1138	Search server Administrator user name	M	11/15/2016 12:36:11AM	Search server Administrator user name			
3	262	1139	Search server Administrator user password	M	11/15/2016 12:36:11AM	Search server Administrator user password			
4	262	1140	Search server proxy user name	M	11/15/2016 12:36:11AM	Search server proxy user name			
5	262	1141	Search server proxy user password	M	11/15/2016 12:36:11AM	Search server proxy user password			
6	262	1142	Search call back user name	M	11/15/2016 12:36:11AM	Search call back user name			
7	262	1143	Search call back user password	M	11/15/2016 12:36:11AM	Search call back user password			
8	262	2172	Crawling in progress next status check in 120 seconds	M	08/29/2017 3:11:46AM	Crawling in progress next status check in 120 seconds			
9	268	1077	Detailed View Display Settings	M	10/24/2017 4:54:43AM	Detailed View Display Settings			
10	268	1078	Facet State	M	10/24/2017 4:54:43AM	Facet State			
92	262	2158	Domain status is Active	M	02/02/2016 8:00:59AM				
93	262	2159	Domain status is Inactive	M	02/02/2016 8:00:59AM				
94	158	20689	Sub Layout Container Selection	M	02/02/2016 8:02:41AM				
95	158	20690	Sub Container Properties	M	02/02/2016 8:02:41AM				
96	269	244	Run Refresh Materialized View AE with Control ID %1	M	03/01/2016 3:00:53AM	Run Refresh Materialized View AE			
97	269	245	No Materialized View to Refresh	M	03/01/2016 3:00:54AM	No Materialized View to Refresh			
98	269	246	Tests	M	03/01/2016 3:02:34AM	Tests			
99	269	100	More languages installed in the selected target %1 than PeopleSoft Image	M	03/01/2016 3:08:47AM	Target Database %1 has more Languages installed than exist in the current PeopleSoft Image. In order to proceed with package creation, the additional languages must be installed in the Image.			
100	269	247	The Base Language of this Image has been determined to be %1.	M	03/01/2016 3:08:47AM	Error: The Loading of languages through this Wizard is not supported for non-Base English Databases. The Base Language of this Image has been determined to be %1.			

One of the objects you are trying to lock is already locked by another user.

Note: This result only applies to Run to HTML option for displaying query result, such as links to run query to html output from WorkCenter, Navigation Collection menu, Query Manager and Query Viewer.

Viewing Underlying SQL Code

Use the View SQL page (QRY_SQL) to view the underlying SQL code that Query Manager generates based on your query definition. You can select the **XLAT/Related Language** check box to display

the full SQL, including the system generated XLAT and Related Language left outer joins; otherwise, deselect this check box to display the SQL without the XLAT and Related Language joins. You cannot modify SQL on this page.

Navigation:

1. Select **Reporting Tools > Query > Query Manager**.
2. Create a new query or search for an existing one.
3. From the Fields page, select the SQL tab.

This example illustrates the fields and controls on the View SQL page.

Records Query Expressions Prompts Fields Criteria Having Dependency Transformations View SQL Run

Query Name QRY_XLAT_EXPR_DOC Description XLAT in Expression Feed

☒ XLAT/Related Language

Query SQL

```
SELECT A.QE_JOB_OPENING_ID, TO_CHAR(A.EFFDT,'YYYY-MM-DD'), A3X.XLATSHORTNAME, A.QE_JO_TYPE,
A.QE_PRM_PST_TITLE, A.QE_PRM_PST_TITLE
FROM PS_QE_QRYTR_ALLJOB A LEFT OUTER JOIN PSXLATITEM A3X ON A3X.FIELDNAME='QE_JO_TYPE' AND
A3X.FIELDVALUE=A.QE_JO_TYPE AND A3X.EFF_STATUS = 'A' AND A3X.EFFDT = (SELECT MAX(EFFDT) FROM PSXLATITEM TB
WHERE TB.FIELDNAME=A3X.FIELDNAME AND TB.FIELDVALUE=A3X.FIELDVALUE AND TB.EFF_STATUS = 'A' AND TB.EFFDT <=
TO_DATE(TO_CHAR(SYSDATE,'YYYY-MM-DD'),'YYYY-MM-DD'))
WHERE ( A.EFFDT =
(SELECT MAX(A_ED.EFFDT) FROM PS_QE_QRYTR_ALLJOB A_ED
WHERE A.QE_JOB_OPENING_ID = A_ED.QE_JOB_OPENING_ID
AND A_ED.EFFDT <= SYSDATE)
AND A.QE_JOB_OPENING_ID < 300151
AND A.QE_JO_TYPE <> ''
AND A.QE_PRM_PST_TITLE <> '' )
ORDER BY 4
```

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

Note: To copy the SQL statement, highlight the text of the statement, copy it using your browser's copy command, and then paste it into another application.

Previewing Query Results Prior to Saving

Use the Run page (QUERY_VIEWER) to 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.

Navigation:

To access the Run page:

1. Select **Reporting Tools > Query > Query Manager**.
2. Create a new query or search for an existing one.
3. From the Fields page, select the **Run** tab.

This example illustrates the fields and controls on the Run page. Definitions for the controls appear following the example.

RecordsQueryExpressionsPromptsFieldsCriteriaHavingDependencyTransformationsView SQLRun

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

First1-100 of 386Last

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

Field or Control	Description
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, <i>deactivate</i> the Enable Auto Preview feature. When this feature is active, your query automatically runs each time you select the Run tab. To <i>activate</i> 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 Specifying Query Preferences.
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.
Download to XML	Click this link to download your query result as XML format to another browser window. Note: To grant users access to download your query to XML, you must make sure that their permission lists include the WEBLIB_QUERY web library with full access.

Query Results in Double-Byte Characters

In the Run page, the width of rows are automatically adjusted to show the query results. If the query results are in double-byte characters (for example, Japanese), rows may wrap vertically.

To view the row horizontal with no line break:

1. In PeopleSoft Application Designer, open the PTQUERYSTYLESUB definition.
2. Open the PSQRYRESULTSHDR style class properties.
3. In the Spacing/Alignment tab, select the *Nowrap* option from the **White Space** drop-down list.

See “Setting Style Class Attributes” (Application Designer Developer’s Guide), “Specifying Spacing and Alignment” (Application Designer Developer’s Guide).

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.

This example shows the information that you must define when you save your query for the first time.

The screenshot shows a dialog box titled "Enter a name to save this query:" with a close button (X) in the top right corner. A "Help" link is also present in the top right. The dialog contains the following fields and controls:

- *Query**: A text input field.
- Description**: A text input field.
- Folder**: A text input field.
- *Query Type**: A dropdown menu with "User" selected.
- *Owner**: A dropdown menu with "Private" selected.
- Query Definition**: A large text area for entering the query definition.
- OK**: A dark button to confirm saving.
- Cancel**: A light blue button to cancel saving.

To save a query for the first time:

1. After you make your changes in Query Manager (**Reporting Tools** > **Query** > **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 want 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 the query types also include *role*, *process*, and *archive*.

6. In the **Owner** field, select whether your query is *Public* or *Private*.

- *Private*: Only the user 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 the **OK** button to save the query.

Note: Using the **Save As** link creates another instance of the query that you can modify and save under a different name. When you click the **Save As** link, the Enter a Name to Save This Query page also appears enabling you to change the name, description, and owner of the new query.

Running Queries

Using the HTML, Excel, or XML links on the Query Manager search page, you can run a predefined query from your browser and view it online in a new browser window. These links are useful when you run the same query multiple times with different runtime prompt values and then compare the results of the queries.

If you want to run the query 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**.

The Query Manager Search page appears.

2. Search for a query using the basic or advanced search function.

Both search types enable 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 enables 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, 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, 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 scroll-bar to view the remainder 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.

- **XML:** Click to download query result to browser in webbrowser format. There are options that enable you to open, save, or cancel the downloaded file.

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

See [Scheduling Queries](#).

Related Links

“Running BI Publisher PeopleSoft Query Reports” (BI Publisher for PeopleSoft)

“Security Basics” (Security Administration)

Downloading Queries

You can download your query to a 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: 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 options:

- **HTML:** Click this link on the Query Manager or Query Viewer search results page.
- **Excel:** Click this link on the Query Manager or Query Viewer search results page.

After you click the Excel link, there are options that enable you to save, open, or cancel downloading query results to Microsoft Excel.

Note: The CacheBaseDir= setting in the psappsrv.cfg file specifies the location of temp files that are created by the Query to Excel execution. Those temp files are removed automatically after the run. If the CacheBaseDir is not set in the psappsrv.cfg file, all temp files are located under %PS_SERVDIR %.

See [Enabling the Query Access List Cache](#), “CacheBaseDir” (System and Server Administration).

- **XML:** Click this link on the Query Manager or Query Viewer search results page.

After you click the **XML** link, query result is downloaded to browser with the XML output formatted for use with BI Publisher and there are options that enable you to open, save, or cancel the downloaded file. If you click the **Open** button, XML formatted query result is downloaded to browser. You can also select the *XML* option as the format of your query results in the Schedule Query page when schedule to run a query.

- **Download to Excel:** Click this link on the Query Manager or Query Viewer Run page.

Note: The Download to Excel feature requires fontconfig package. See "Completing the Installation" in *PeopleSoft 9.2 Application Installation* for your database platform to install the fontconfig package.

- **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.

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.

- **CSV Text File:** This option is available after you have clicked the **HTML** link. If you click this option, the File Download page appears enabling you to 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.

Because Microsoft Excel does not support UTF-8 encoding, the CSV file is written in binary mode with UCS-2 encoded data. Moreover, Excel does not automatically recognize Unicode-encoded, comma-delimited files even if they have a .csv extension. Therefore, you are not be able to open the receiving file by double-clicking. Instead, you must open the receiving file using the File\Open menu in Excel and choose the comma delimiter.

- **XML File:** This option is available after you have click the **HTML** link. If you click this option, the File Download page appears enabling you to open the XML formatted query result in your browser or save it to your local machine.

Performing Query 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.

This example shows a basic lookup using ADDRESSLIST.

ADDRESSLIST - Address List

*Empl ID:



View Results

To perform a lookup:

1. Select **Reporting Tools > Query > Query Manager**.
2. Search for an existing one.
3. Click the **HTML** link from the Query Manager search page for the ADDRESSLIST query name from the query list.
4. 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.
5. On the Look Up page, click the drop-down list 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.

6. 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.

7. Click the link in the result field.

The Query page appears with the required value already complete.

8. Click the **View Results** button.

The query results appear on the page.

Performing Definitional Reference Lookups in Queries

Use the Definitional References to Query page (QRY_DEFN_REF) to view all PeopleSoft definitional objects that use this particular query as the data source. The results show the definition ID, definition type, and definition sub-types if they are available.

These object types are included in the Definitional References to Query page:

- BI Publisher (with the Report Definition or Data Source Definition subtypes)

- Connected Query
- Composite Query
- Pivot Grid
- PeopleSoft Search Framework
- Cube Builder, Cube Outline, and Cube Dimension
- Query Feed and Query Feed Template

Navigation:

1. Select **Reporting Tools > Query > Query Manager**.
2. Click the **Search** button and then click a **Lookup References** link.

This example illustrates the fields and controls on the Definitional References to Query page.

Definitional References to Query "QE_EMPLOYEE"		
Definitions referencing Query "QE_EMPLOYEE"		
Definition ID	Definition Type	Definition Sub-Type
CPQ_TCREATE_PROMPT	Composite Query	
EMPLOYEE_REPORTING_DETAILS	Connected Query	
EMPL_RPRT_DETAILS_COPY	Connected Query	
QE_CHARTFIELDS_CQ	Connected Query	
QE_COPY_OF_CQ_QUICK_START	Connected Query	
QE_CPQ_AGGREGATE_TYPES	Composite Query	
QE_CPQ_SMOKE	Composite Query	
QE_CPQ_SMOKE_FILTERS	Composite Query	
QE_CPQ_SMOKE_PROMPT	Composite Query	
QE_CPQ_TCREATE_EXPR	Composite Query	
QE_CPQ_TCREATE_FILTER	Composite Query	
QE_CPQ_TCREATE_MULT	Composite Query	
QE_CPQ_TCREATE_NEW	Composite Query	
QE_CPQ_TCREATE_PROMPT	Composite Query	
QE_CQ_XFORM_SMOKE	Connected Query	
QE_EMPLOYEE	BI Publisher	Data Source Definition
QE_EMPLOYEE_REPORTING_DETAILS	Connected Query	
QE_EMPL_DEPT_DETAILS	Connected Query	
QE_QAS_EMPL_DEPT_DETAILS_PRI	Connected Query	
QE_QAS_EMPL_REPT_DETAILS_PRI	Connected Query	
QE_SORT1	BI Publisher	Report Definition
QE_SORT2	BI Publisher	Report Definition

Note: The Lookup References feature specifically lists only *definitional* references, which are defined PeopleSoft objects of specific types. This feature is not used to find references that are not *definitional* references, such as Query API references in PeopleCode or any static text references to that query name, whether in SQL objects, scripts, PeopleCode, and so on.

nVision query-based reports are not listed in the Definitional References to Query page because nVision definitions do not contain the query reference in its definition record in the database, but only in the physical template file that is stored on the server.

The **Lookup References** links are available in the Query Manager search page, Query Viewer search page, Connected Query Manager search page, and Connected Query Viewer search page.

Printing Query Results

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

To print query results on your default printer:

1. Select **Reporting Tools > Query > Query Manager**.
2. Click the **Search** button, and then click either the **HTML** or **Excel** links.
3. 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 "Setting Query Permissions" (Security Administration).

Using Query Viewer

Query Viewer is a read-only version of Query Manager. It enables security administrators to limit some users to read-only access for all queries, so they can only view or print queries.

Navigation:

Access the Query Viewer page by selecting **Reporting Tools > Query > Query Viewer**.

This example illustrates the fields and controls on the Query Viewer page.

Query Viewer

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

* **Search By** begins with

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

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

* **Folder View**

Query									
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
BI_PVG_BILL_VW	Bill Hdr w INV bill status vw	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
BI_PVG_IVC_VW	Bill Hdr w INV bill status vw	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
CM_ATTRIBUTES	Attribute mappings	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
CM_DIM_CTRL_TBL	Dimension Control Table	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
CM_FACT_CTRL_TBL	Fact Control Table	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
CM_FACT_MAP_TBL	Fact Map Table	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
CM_FIELD_PROPERTIES		Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
CM_HIER_CTRL_TBL	Hierarchy Control table	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
CM_HIER_MAP_TBL	Hierarchy Map Table	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite
CT_PSLATITEM		Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

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**, **Excel**, or **XML** link to the right of the query on the Search Results page.

Note: After you click the **HTML** link, you have an option to view the XMLP formatted result in a new browser by clicking the **Download to XML File** link on the HTML result page.

- View a query in XMLP formatted result by clicking the **XML** link.
- 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 click the **CSV Text File** link on the HTML results of the query to download the results to a CSV text file.

To download the results to a Microsoft Excel file, click the **Excel Spreadsheet** link on the HTML results page.

- Print a query.

See [Printing Query Results](#).

- 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 “Understanding Process Monitor” (Process Scheduler), “Viewing the Status of Processes” (Process Scheduler), “Viewing the Status of Servers” (Process Scheduler).

- Look up definitional references.

Click the **Lookup References** link to display the Definitional References to Query window, where you can view all PeopleSoft definitional objects that use this particular query as the data source. The results show the definition ID, definition type, and definition sub-types if they are available.

See [Performing Definitional Reference Lookups in Queries](#).

- Add queries to the favorites list.

Click the **Favorite** link to add the frequently used queries to the My Favorite Queries section. After you create a favorite, the My Favorite Queries section appears on the Query Viewer search page and Query Manager search page. You can access the favorite queries without performing the query search and you have the option to remove these queries from the My Favorite Queries section as needed.

Note: Queries in the My Favorite Queries section are linked to the user ID.

See [Organizing Queries](#).

Note: Online viewing of Query-based BI Publisher reports is available by selecting **Reporting Tools > BI Publisher > BIP Query Report Viewer**.

Related Links

[Previewing Query Results Prior to Saving](#)

[Running Queries](#)

[Scheduling Queries](#)

“Running Reports in Query Report Viewer” (BI Publisher for PeopleSoft)

Chapter 3

Defining Selection Criteria

Choosing 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.

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

Viewing and Editing Selection Criteria

Use the Criteria page (QRY_CRITERIA) to view and edit selection criteria for your query statement.

Navigation:

Reporting Tools > Query > Query Manager > Criteria

This example illustrates the fields and controls on the Criteria page. You can find definitions for the fields and controls later on this page.

Query Name: QE_EMPDEPT Description: Employee Count By Department Feed

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

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.EMPLID - Empl ID	between	7000 AND 9000	Edit	-
AND	A.QE_EMPLOYEE_NAME - Employee Name	is not null		Edit	-
OR	A.QE_LAST_NAME - Last Name	in tree	„QE_JOBCODES,1999-01-01,DIR ECTOR,OFFICER	Edit	-

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

Field or Control	Description
Add Criteria	Click to access the Edit Criteria Properties page, where you can add additional criteria for the query.
Group Criteria	Click to access the Edit Criteria Grouping page, where you can group your criteria logically.
Reorder Criteria	Click to access the Edit Criteria Ordering page, where you can reorder the criteria for your query.
Logical	Any rows after the first row must include either an <i>AND</i> or <i>OR</i> 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 <i>AND</i> .
Edit	Click to access the Edit Criteria Properties page, where you can edit the existing criteria for the query.

Adding Criteria Properties

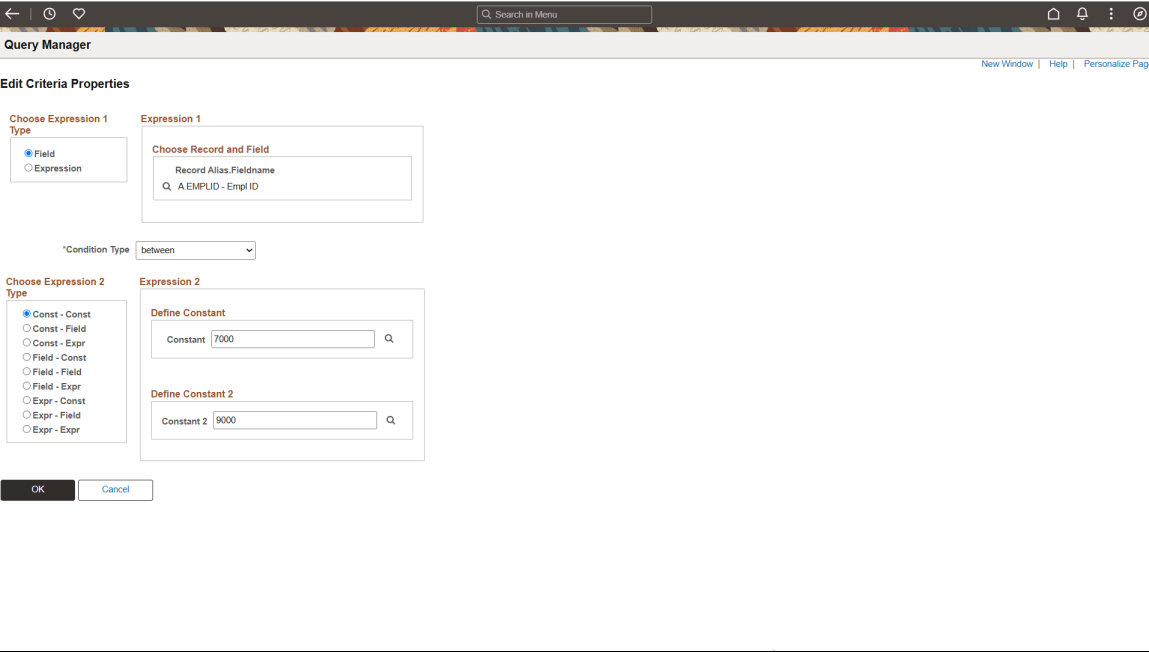
Use the Edit Criteria Properties page (QRY_CRITERIA_SEC) to add or edit selection criteria properties for your query statement.

Navigation:

1. Select **Reporting Tools > Query > Query Manager**.
2. Open an existing query.
3. Select the Criteria tab to access the Criteria page, and click the **Add Criteria** button.

Alternatively, access the Fields page and click the **Use As Criteria** link.

This example illustrates the fields and controls on the Edit Criteria Properties page. Definitions for the fields and controls appear following the example.



Field or Control	Description
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 select an appropriate comparison operator from the Condition Type drop-down list. See Selecting Condition Types.
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. See Defining Expressions

Creating Criteria Based on a Field

To create criteria based on a field:

- 1. Select **Reporting Tools > Query > Query Manager**.

2. Create a new query or search for an existing one.
3. Access the Criteria page, and click the **Add Criteria** button.

Alternatively, access the Fields page and click the **Use As Criteria** link. If you accessed the Edit Criteria Properties page by clicking the **Use As Criteria** link on the Fields page, Query Manager populates the selected field in the **Expression 1** field.

4. In the Edit Criteria Properties page, specify the criteria for the field, and click the **OK** button to return to the Fields or Criteria page.

You can also use a field from a record as criteria even if you do not select 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 (for example, *not equal* or *not less than*) rather than the *NOT* operator on the entire criterion (for example, *AND NOT* or *OR NOT* logical operator). When you use *NOT*, PeopleSoft Query cannot use SQL indexes to speed up the data search. When you use the *not* version of an operator, PeopleSoft Query can translate it into a SQL expression that enables it to use the indexes.

Condition Types	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.

Condition Types	Return Values
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 “PeopleSoft Tree Manager Overview” (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.
less than	The value in the record field is less than the comparison value.
like	The value in the selected field matches a specified string pattern. The comparison value may be a string that contains wildcard characters. The wildcard characters that PeopleSoft Query recognizes are % and _. % matches any string of zero or more characters. For example, C% matches any string starting with C, including C alone. _ matches any single character. For example, _ones matches any five-character string ending with ones, such as Jones or Cones. PeopleSoft Query also recognizes any 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 select the **EFFDT** field on an effective-dated table, you can use the effective-date operators in PSQuery.

Entering Comparison Values

This topic 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.

Value Type	Action
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 Defining Prompts.
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 Working with Subqueries.
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.

Value Type	Action
Tree Prompt Option	The value in the selected field enables you to select a tree value as a tree prompt, when the query is run. This value type is available only when the selected operator is in tree or not in tree. When you select the Tree Prompt Option as the comparison value, all options to select tree values at design time are not available. However, you are able to select tree values as tree prompts when you run the query.
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* in the Choose Expression 2 Type section as your comparison value, the Define Constant section appears. In the Constant field, enter the value to which you want to compare the first expression. Otherwise, click the Constant **Look Up** button to access the Select a Constant page where you can select a constant value from the available constants.

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

To select a constant value from the available constants:

1. Click the **Constant Look Up** button on the Select A Constant page.
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 the **OK** button.

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

This example illustrates the field and controls on the Select A Constant page when there is only one constant field.

The screenshot shows a dialog box titled "Select A Constant". It has a close button (X) in the top right corner and a "Help" link. Below the title, there is a search field labeled "EmpID:" with a magnifying glass icon. At the bottom, there are two buttons: "OK" and "Cancel".

This example illustrates the fields and controls on the Select a Constant page when there are multiple constant fields.

The screenshot shows a page titled "Select A Constant". Below the title, there is a section labeled "Values" with a search icon and a "View All" link. A table displays the following data:

Field Value	Translate Long Name	Translate Short Name	Select Constant
CNF	Conference Attendance	Conference	Select Constant
DIS	Disability	Disability	Select Constant
DSC	Disciplinary	Disciplinary	Select Constant
JUR	Jury Duty	Jury Duty	Select Constant
MAT	Maternity/Paternity	Maternity	Select Constant
OTH	Other	Other	Select Constant
PER	Personal	Personal	Select Constant
REL	Religious	Religious	Select Constant
SCK	Sick	Sick	Select Constant
VAC	Vacation	Vacation	Select Constant

At the bottom of the page, there is a "Cancel" button.

Building a List of Values

When you select *In List* as your comparison value, the Edit List page appears. Use the Edit List 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, which dynamically reflects which record is used.

This example illustrates the fields and controls on the Edit List page. Definitions for the fields and controls appear following the example.

Edit List

List Members

Personalize | Find |   First  1-4 of 4  Last

☒	1001
☐	1002
☐	1121
☐	1310

Value:

Add Value

Search

Delete Checked Values

Add Prompt

OK

Cancel

Field or Control	Description
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.

Field or Control	Description
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. When the Select a Constant page appears again, click the OK button, and the selected value appears in the List Members grid.
Add Prompt	Click 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 in the Edit List page 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 the **OK** button, 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.

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

When you finish adding prompts, click the **OK** button to close the Edit List page.

Adding Comparison Values to an Expression List

When you select the **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.

This example illustrates the fields and controls on the Select a Tree page.

Tree Name	SetID	SetControlValue	Effective Date	Description	Saved As
QEQ_DEPT	SHARE		01/01/1900	Manufacturing Departments	Valid Tree
QE_ACE_DGC_DEPT	QEDM1		01/01/1900	Dept Tree for DGC Model	Valid Tree
QE_DEPT_DYNAMIC	QEDM1		01/01/1999	Dynamic Detail Dept Tree	Valid Tree
QE_DEPT_SEC	QEDM2		01/01/2001	DEPART SECURITY	Valid Tree

This example shows how to select tree nodes in the Display and Select TreeNodes page.

To select tree nodes:

1. In the Display and Select TreeNodes page, highlight the desired tree node, and click the **Add Node** icon.
2. If you know the name of the node that you want, enter the name of the node in the **Manual Selection** drop-down list.

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** drop-down list.

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.

Defining a Criteria with Tree Prompt in PeopleSoft Query

In addition to the option of selecting the tree value at design time for a criteria, Tree Prompts option will allow the user an option to select the tree and node value at run time. This allows the user to reuse the same query to get various organizational reports.

Note: In both web-based Query Manager and Windows client [psqed.exe], while creating a query you have the option of selecting to enter the tree details either at the design time or at the runtime. There is a Tree Prompt Option (an expression type) and a Tree Option when you select the condition type as In Tree or Not In Tree. Based on your selection, the tree option is handled to execute the query accordingly in the specified modules.

When you select the Tree Prompt Option as the comparison value, all options to select tree values at design time are not available. However, you are able to select tree values as criteria prompts when you run query.

This is an example of the Edit Criteria Properties with the Tree Prompt Option is selected.

The screenshot shows the 'Query Manager' window with the 'Edit Criteria Properties' dialog open. The dialog has a title bar with 'Query Manager' and a search bar. The main content area is titled 'Edit Criteria Properties'. It contains two sections for defining expressions. The first section, 'Choose Expression 1 Type', has 'Field' selected. The second section, 'Choose Expression 2 Type', has 'Tree Prompt Option' selected. A 'Condition Type' dropdown is set to 'In tree'. A 'Record Alias.Fieldname' field contains 'Q. A.PTSF_DBOARD_NAME - Dashboard'. At the bottom are 'OK' and 'Cancel' buttons.

After the Tree Prompt Option is selected:

- The Criteria page has a same criteria prompt entry.
- The View SQL page displays the viewable SQL for the in tree prompt.

Note: Since tree information at query design time is not known yet, the SQL in the View SQL page is different from the SQL that actually runs in the database. When query is finally executed, based on the user's selection of tree and nodes when prompted, the SQL is modified accordingly with tree info in order to fetch rows of data.

- When you access the Run page, you are prompted for selecting the tree for the specified field and its node list.

Based on the tree node list that you selected, and after collecting the other prompt values, if any, the results are displayed on the Run page.

Note: Query that has a criteria with tree prompts cannot be run as part of any process, either via Process Scheduler or from command line. However, you can execute the query with tree prompts from Query Scheduler.

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.

Related Links

“Using Effective Dates” (Applications User’s Guide)

Grouping 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.

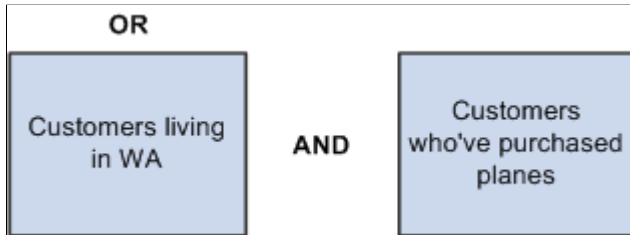
This topic describes the AND and OR logical operations and discusses how to group criteria in query.

Understanding the 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).

This diagram illustrates the rows that are 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.

Grouping Criteria in Query

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.

This example shows the criteria settings for a list of customers who are not friends and reside in either California (CA) or Florida (FL).

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.CUSTOMER_TYPE - Customer Type	not equal to	FRND	Edit	-
AND	A.STATE - State	equal to	CA	Edit	-
OR	A.STATE - State	equal to	FL	Edit	-

The set of criteria that was entered in the previous sample page returns a list of customers in California (except for those who are friends) and *all* customers in Florida (including those who are friends). This list results because PeopleSoft Query evaluates criteria in the order of appearance. It looks for rows where the customer is not friend *and* where the state is California *or* rows where the state is Florida.

What you really want PeopleSoft Query to search for are rows where the state is California *or* Florida, *and* where the customer type is not friend. 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.

Using the **Group Criteria** button on the Criteria page to access the Edit Criteria Grouping page (QRY_CRITERIA_GROUP) where you can insert the opening parenthesis just before the field name and the closing parenthesis just after the comparison value.

This example shows the Edit Criteria Grouping page with open and close parentheses around the second the third criteria.

Edit Criteria Grouping

Use the edit boxes to enter parenthesis for each criteria. Use only the '(' and ')' characters.

Logical	Left Paren	Expression1	Condition Type	Expression 2	Right Paren
		A.CUSTOMER_TYPE - Customer Type	not equal to	FRND	
AND	(	A.STATE - State	equal to	CA	
OR		A.STATE - State	equal to	FL	)

This example shows the Criteria page with open and close parentheses around the second the third criteria.

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

Query Name CUSTOMER_INFO Description Customer Information Feed

Add Criteria Group Criteria Reorder Criteria

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.CUSTOMER_TYPE - Customer Type	not equal to	FRND	Edit	-
AND	(A.STATE - State	equal to	CA	Edit	-
OR	A.STATE - State	equal to	FL)	Edit	-

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

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

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. The query uses the value that you enter as the comparison value for the criterion that included the prompt.

If the field you are prompting has an associated prompt table (even if it is the Translate table), the **Edit Table** drop-down list shows its name.

Viewing and Editing Prompts

Use the Prompts page (QRY_PROMPT) to add or edit a prompt.

Navigation:

Reporting Tools > Query > Query Manager > Prompts

This example illustrates the fields and controls on the Prompts page.

Records	Query	Expressions	Prompts	Fields	Criteria	Having	Dependency	Transformations	View SQL	Run
Query Name		QE_EMPLOYEE		Description		QE Employee Info		Feed		
Add Prompt										
Prompts List										
Prompt	Edit	Delete								
:1 = EMPLID - ID	Edit	[-]								
:2 = EMPL_STATUS - Status	Edit	[-]								
Save Save As New Query Preferences Properties Publish as Feed Publish as Pivot Grid New Union										
Return To Search										

Editing Prompt Properties

Use the Edit Prompt Properties page (QRY_PROMPT_SEC) to edit the prompt properties.

Navigation:

1. Select Reporting Tools, Query, Query Manager.
2. Add a new query or search for an existing one.

3. Access the Prompts page.
4. Click the **Add Prompt** button or the **Edit** button on the Prompts page.

This example illustrates the fields and controls on the Edit Prompt Properties page. Definitions for the fields and controls appear following the example.

Edit Prompt Properties

Field Name
 PRCSTYPE

*Heading Type
RFT Short

*Type
Character

*Format
Mixed Case

Length
30

Decimals

*Edit Type
Translate Table

☐ Optional

Heading Text
Type

*Unique Prompt Name
BIND2

Prompt Table
 PRCSTYPE_VW

Default Value
Cube Builder

Field or Control	Description
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 Oracle's PeopleTools.

Field or Control	Description
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, 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 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.
Optional	Use this option to define whether the prompt is optional or required. • Select this option to indicate that the query prompt is optional. When the prompt is set to optional, a query may return a large result set because results are not limited or restricted by a prompt value. • Clear this option to indicate that the query prompt is required. By default, the Optional option is cleared and a valid prompt value must be selected or entered when you run the queries that have prompts. Note: A required prompt value must be validated based on the Edit Type list. Prompt with the Edit Type set to <i>Yes/No Table</i> cannot be set as optional prompt because there are only two valid values, <i>Y</i> and <i>N</i>. See the “Defining Optional Prompts” section later in this topic for more information about defining optional prompts.

Field or Control	Description
Default Value	Use this field to set a default value for the prompt. The value in this field is used to populate the prompt when no other prompt value is selected or entered. For character fields, you can add a default prompt value that has up to 254 characters long. Note: Entering a default value for a prompt set the prompt to <i>required</i>. If the Optional option is selected, when you enter a default prompt value for the prompt, the Optional option is cleared and a message appears saying: “Optional prompt cannot have default value. Prompt is now set to be required.” Default prompt value is not a translatable field. Tree prompts cannot be used as the default or optional prompt values.

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.

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.

Related Links

[Adding Fields to Query Content](#)

Using the Default Prompt Values for Query Prompts

In the Edit Prompt Properties page, if there is a default prompt value, when you run the query, the prompt window displays the default prompt value in the prompt field.

This example shows the Edit Prompt Properties page with the **Default Value** field set to *Cube Builder*.

Edit Prompt Properties

Field Name

PRCSTYPE

*Heading Type

RFT Short

*Type

Character

Heading Text

Type

*Format

Mixed Case

*Unique Prompt Name

BIND2

Length

30

Decimals

*Edit Type

Translate Table

Prompt Table

PRCSTYPE_VW

☐ Optional

Default Value

Cube Builder

This example shows the prompt window with the default prompt value *Cube Builder* displayed for the character prompt.

RecordsQueryExpressionsPromptsFieldsCriteriaHavingDependencyTransformationsView SQLRun

Query NameQE_QRY_DPROMPT_CHAR

DescriptionTest default char prompt

Feed

Query SQL

SELECT A.PRCSTYPE, A.PRCNAME, A.OUTDESTTYPE, A.OUTDEST, A.OUTDESTSRC
FROM PS_QE_QRY_PRCDEFN A
WHERE (A.PRCSTYPE = :1)
ORDER BY 2

QE_QRY_DPROMPT_CHAR

Type: Cube Builder

OKCancel

Save

Save As

New Query

Preferences

Properties

Publish as Feed

Publish as Pivot Grid

New Union

In the prompt window, you can either run the query using the default prompt value or enter a different value to overwrite the default prompt value. If you do not use the default prompt value, the prompt value that you enter or select must be validated based on the value selected in the **Edit Type** list. For example, if the **Edit Type** list is set to **Prompt Table**, the prompt value must be a valid value from the prompt table.

Note: After you define the default prompt value, you are not able to run the query with a blank prompt value. In fact, the value in the **Default Value** field is always used as the prompt value if you do not enter a value for the prompt. For example, after you define the **Default Value** field and save the query, and then you clear the default value when you run the query, the query still runs using the value in the **Default Value** field as the prompt value, even after you clear the value.

If you do not enter a default value for the prompt and the required prompt is set to *No Table Edit*, the system runs the query using the blank value for a character prompt and using 0 (zero) for a numeric prompt.

If there is a default prompt value and you enter *NULL* as a prompt value when you run the query, the default prompt value is used as the prompt value.

Note: PSQuery doesn't support the criteria that compare the long character fields to the prompt values. You can only set criteria with long character field to be *Is Null* or *Is Not Null*.

PSQuery does not set a numeric prompt field to *NULL*, so numeric prompt always initialize with 0 (zero), which may be the value that you enter or the default value of a field.

- If 0 is a value of an optional numeric prompt and it also is *NULL*, this *NULL* value is used as an indicator that you have not entered a prompt value; therefore, the criteria defined to be compared with an optional numeric prompt is dropped during runtime.
- If 0 is a valid prompt value, you should not set the prompt to optional. The query is run with the prompt value set to 0 and the prompt value is validated accordingly.

Using System Variables as the Default Prompt Values

In addition to specifying the default prompt value as a constant, you can use system variables as the default prompt values for some prompt types.

This table lists the system variables that can be used as the default prompt values.

System Variable	Valid for Prompt Type
%Date	Date
%DateTime	DateTime
%Time	Time

For example, if the **Default Value** field in the Edit Prompt Properties page is set to *%Date*, when you run the query using the Run page in Query Manager, the prompt window displays the current date as the default prompt value. You then can either use the default value (current date) or select a new date.

This example shows the Edit Prompt Properties page with the Default Value field set to *%Date*.

Edit Prompt Properties

Field Name:

*Heading Type:

*Type:

*Format:

Length:

Decimals:

*Edit Type:

Prompt Table:

☐ Optional

Default Value:

This example shows the prompt window displaying the current date as the default prompt value.

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

Query Name: QECEDATE_2 Description: Query for CE Prompt

Add Prompt

Prompts List: Personalize Find 1-2 of 2 Last

Prompt	Edit	Delete
1 = BUSINESS_UNIT - Business Unit	Edit	
2 = JOURNAL_DATE - Journal Date	Edit	

Save Save As New Query Preferences Properties Publish as Feed

Return To Search

QECEDATE_2

Journal Date: 05/29/2014

OK Cancel

When you use the Schedule Query page to schedule a query that has a date prompt with the **Default Value** field in the Edit Prompt Properties page set to *%Date*, the prompt window also appears displaying the current date as the default value.

To ensure the correct date is displayed on the query report every time the query is run:

- If you click the **OK** button in the prompt window without entering a new prompt date, the default prompt date value (%Date) is saved to the run control record instead of the current date (resolved value of %Date).
- If you click the **OK** button in the prompt window after you enter a new prompt date value, for example, 01/01/2014, the new prompt date value 01/01/2014, not the %Date value, is saved to the run control record.

Defining Optional Prompts

This section describes optional Prompt expression types and how to set them.

Understanding Defining Optional Prompts

When a user runs a query with an optional prompt defined, a prompt dialog box appears when he or she runs the query. They can enter or select a prompt value to refine the returned result set or not enter a value/by-pass the dialog box and get the entire result set.

When defining criteria, the Between condition type is not supported for Prompt expression types defined as optional. Instead, use an Expression expression type using greater than (>) and less than (<) operators to define the criteria. The following example shows a sample expression using greater than (>) and less than (<) operators to achieve a similar result as a Between condition type:

```
(A.MESSAGE_SET_NBR = :1 OR A.MESSAGE_SET_NBR > :1) AND ( A.MESSAGE_SET_NBR < :2 O⇒  
R A.MESSAGE_SET_NBR = :2)
```

Setting Optional Prompts

This example shows the Edit Prompt Properties page with the **Optional** option selected and prompt table is set to *PRCSTYPE_VW*, which is used to validate the prompt value.

Edit Prompt Properties

Field Name:

*Heading Type:

*Type:

*Format:

Length:

Decimals:

*Edit Type:

*Unique Prompt Name:

Prompt Table:

☒ Optional

Default Value:

When you use the Run page in Query Manager to run a query with the prompt set to Optional, a prompt window is displayed.

This example shows the prompt window when you run a query using the Run page in Query Manager.

Records Query Expressions Prompts Fields Criteria Having Dependency Transformations View SQL Run

Query Name: QRY_OPROMPT_CHAR Description: Optional char prompt [Feed](#)

Query SQL:
 SELECT A.PRCSTYPE, A.PRCNAME, A.OUTDESTTYPE, A.OUTDEST, A.OUTDESTSRC
 FROM PS_QE_QRY_PRCDEFN A
 WHERE (A.PRCSTYPE = :1)

Save Save As New Query Preferences Properties Publish as Feed Publish

Return To Search

QRY_OPROMPT_CHAR [Help](#)

Type:

OK Cancel

Because the prompt is set to optional, you can either enter a valid prompt value or click the **OK** button on the prompt window without entering a prompt value.

- If you enter a prompt value, that prompt value must be validated because the prompt is defined to have the **Edit Type** option set to *Prompt Table*. If so, the query is run using the entered prompt value and the report results display the prompt setting.

This example shows the query results with *Type = XML Publisher* is displayed as the prompt setting:

Records	Query	Expressions	Prompts	Fields	Criteria	Having	Dependency	Transformations	View SQL	Run
Type = XML Publisher										
View All Rerun Query Download to Excel Download to XML First 1-100 of 207 Last										
	Type	Name	Type	Destination	Dest Sourc					
1	XML Publisher	TRX5001	0		3					
2	XML Publisher	TRX5003	0		3					
3	XML Publisher	PO_LGSPND	0		3					
4	XML Publisher	CS_OBJ_DEV	0		3					
5	XML Publisher	TRX5000	0		3					
6	XML Publisher	TRX5002	0		3					
7	XML Publisher	CS_DOC_STAT1	0		3					
8	XML Publisher	SPL_CAPX_RPT	0		3					
9	XML Publisher	FSX0007	0		3					
10	XML Publisher	FSX5101	0		3					

- If you click the **OK** button without entering a prompt value, the criteria defined to compare with the optional prompt is dropped during runtime. The query is run without the prompt value and the report results do not display the prompt setting.

This example shows the query results without the prompt setting.

Records	Query	Expressions	Prompts	Fields	Criteria	Having	Dependency	Transformations	View SQL	Run
View All Rerun Query Download to Excel Download to XML First 1-100 of 2907 Last										
	Type	Name	Type	Destination	Dest Sourc					
1	Application Engine	AR_PP3	0		3					
2	Application Engine	AR_PP4	0		3					
3	Application Engine	AP_CFOP_JOB	0		3					
4	Application Engine	AP_COPYB_RPT	0		3					
5	Application Engine	AP_FG_PROC	0		3					
6	Application Engine	AP_INIPAC	0		3					
7	Application Engine	AP_JFMIP_UPG	0		3					
8	Application Engine	AP_MATCH	0		3					
9	Application Engine	AP_PCJOB	0		3					
10	Application Engine	AP_PCJOBUPD	0		3					

When you use the Schedule Query page to run a query with the prompt set to optional, a prompt window is also displayed and you can either:

- Click the **OK** button on the prompt window without entering a prompt value. Prompt is saved to the run control record without a value. During the running process, the criteria defined to compare with the corresponding optional prompt are dropped from the SQL before the query runs.
- Enter a valid prompt value on the prompt window and click the **OK** button. The new prompt value is saved to the run control record. Because there is a valid prompt value, the criteria defined to compare with the corresponding optional prompt are used to run the query.

Defining HAVING Criteria

Having Criteria Properties

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.

Viewing the Having Criteria Properties

Use the Having page (QRY_HAVING) to view the having criteria.

Navigation:

Reporting Tools > Query > Query Manager > Having

This example illustrates the fields and controls on the Having page.

Query Name: QE_EMPLOYEE Description: QE Employee Info [Feed](#)

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

Having Criteria					
Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.EMPLID	not equal to	1001	Edit	-

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

[Return To Search](#)

Editing the Having Criteria Properties

Use the Edit Having Criteria Properties (QRY_CRITERIA_SEC) page to add or edit the having criteria properties.

Navigation:

1. Select **Reporting Tools > Query > Query Manager**.
2. Add a new query or search for an existing one.
3. Access the Having page.
4. Click the **Add Having Criteria** button or the **Edit** button on the Having page.

This example illustrates the fields and controls on the Edit Having Criteria Properties page.

Edit Having Criteria Properties

Choose Expression 1 Type

☐ Field

☒ Expression

Expression 1

Define Expression

Expression A.EMPLID

[New Expression](#) [Edit the Expression](#)

*Condition Type not equal to

Choose Expression 2 Type

☐ Field

☐ Expression

☒ Constant

☐ Prompt

☐ Subquery

Expression 2

Define Constant

Constant

Defining Record and Field Dependencies

Use the Dependency page (QRY_PRUNING) to specify whether a record can be pruned during the SQL pruning process in Composite Query. This page also enables you to specify the details of a record or field, depending on other records or fields.

Note: The dependency settings in the Dependency page are used only for the SQL pruning process in Composite Query.

Navigation:

Reporting Tools > Query > Query Manager > Dependency

This example illustrates the fields and controls on the Dependency page. In the Field Dependency section, A.MESSAGE_SET_NBR has dependency on PMSGCATDEFN.MSG_SEVERITY. You can find definitions for the fields and controls later on this page.

RecordsQueryExpressionsPromptsFieldsCriteriaHavingDependencyTransformationsView SQLRun

Query NameMESSAGES_WITHOUT_EXPLAIN_TEXTDescriptionMessages Without Explain TextFeed

Record ListPersonalizeFindView AllFirst1-2 of 2Last

Alias	Record	Prunable
A	PMSGCATDEFN	☐
B	PMSGSETDEFN	☐

Add Field Dependency

Field DependencyPersonalizeFindFirst1 of 1Last

Query Field Name	Record	Field Name
A.MESSAGE_TEXT	PMSGCATDEFN	MSG_SEVERITY

SaveSave AsNew QueryPreferencesPropertiesPublish as FeedPublish as Pivot GridNew Union

Field or Control	Description
Record List	This section lists the records that are added to the query definitions.
Prunable	Select this option to set the record to be able to be pruned during the SQL pruning process in Composite Query.
Add Field Dependency	Click this button to add a new field dependency.

Field or Control	Description
Field Dependency	This section lists the field dependencies that are defined by query developer or query owner. • Query Field Name: A list of the output fields defined for the query definition. • Record: A list of the available records used to define the field dependency. • Field Name: A list of the available fields used to define the field dependency. When you set the field dependency, note that: • If a field is selected in the Query Field Name drop-down list, the field that it depends on is not pruned during the SQL pruning process. In the previous example image, A.MESSAGE_TEXT is selected on the Query Field Name drop-down list, and the field MSG_SEVERITY on the record PSMSGCATDEFN is not pruned during the pruning process. • If a field is selected in the Query Field Name drop-down list, but the dependent Record and Field Name lists have no values selected, the selected query field is not pruned during the SQL pruning process. • If no field dependency is defined for the query definition, the Field Dependency section does not appear.

Note: Record and field dependency information is managed, and this information can be copied along with the query definition.

Adding a Field Dependency

To add a field dependency:

1. Select Reporting Tools, Query, Query Manager.
2. Create a new query or open an existing one.
3. Access the Dependency page.
4. Click the **Add Field Dependency** button to add a new field dependency.

The Field Dependency section appears.

5. Select the values from the **Query Field Name**, **Record**, and **Field Name** drop-down lists.
6. Click the **Save** button.
7. Optionally, repeat Steps 4 through 6 to add additional field dependencies.

Related Links

“Query Access Service Operations” (Reporting Web Services)

“Selecting Records” (Reporting Web Services)

“Executing the Query” (Reporting Web Services)

Defining Expressions

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.

Viewing and Editing Expressions

Use the Expressions page (QRY_EXPRESSIONS) to add or edit an expression.

Navigation:

Reporting Tools > Query > Query Manager > Expressions

This example illustrates the fields and controls on the Expressions page.

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

Query Name EXPENSES Description [Feed](#)

[Add Expression](#)

Expressions List Personalize Find [1 of 1](#) First Last

Expression Text	Use as Field	Add Criteria	Edit	Delete
A.QTY * A.PRICE	Use as Field	Add Criteria	Edit	Delete

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

[Return To Search](#)

Editing Expression Properties

Use the Edit Expression Properties page (QRY_EXPR_SEC) to edit the expression properties.

Navigation:

1. Select Reporting Tools, Query, Query Manager.
2. Add a new query or search for an existing one.
3. Access the Expressions page.
4. Click the **Add Expression** button or the **Edit** button.

This example illustrates the fields and controls on the Edit Expression Properties page.

To add or edit expressions for queries:

1. Select **Reporting Tools > Query > Query Manager**.
2. Select the Expressions tab to open the Expressions page.
3. Click the **Add Expression** button to open the Edit Expression Properties page, where you can select expression types.
4. Select an option from the **Expression Type** drop-down list.

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

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

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 Oracle's 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.

Related Links

“Understanding Meta-SQL” (PeopleCode Language Reference)

Extracting and Transforming Data from PeopleSoft Pure Internet Architecture

Extracting and Transforming Data Overview

PeopleSoft supports integrations with several different reporting tools, such as Pivot Grid, SQR, PS/nVision, Application Engine, and BI Publisher. Reports are typically created by application developers using the corresponding window-client based designer. In most cases, PeopleSoft Query is the primary data source for data from a PeopleSoft database. Users can then use reporting tools to apply additional formatting (HTML, PDF, XLS, XML, and so on) to the data to create a report.

If you have PeopleSoft Pure Internet Architecture access from a browser and do not have access to any PeopleSoft client tools, then you have limited options for customizing PeopleSoft reports. For example, you are unable to modify existing file layouts (in PeopleSoft Application Designer), and so on.

To provide the flexibility to accomplish reporting tasks from Pure Internet Architecture, PeopleTools has provided a way of extracting, transforming, and distributing data from there without the need to access any client tools.

In addition to the currently available formats (HTM, PDF, TXT, XLS, XML, and XMLP), PeopleSoft Query now includes a user-defined output format called *XFORM*, which triggers a transformation (XSLT). You must provide the XSLT to define the desired transformation of the extracted data.

Then, to generate the transformed output and distribute the data results, you schedule the query process to run using the Process Scheduler Request page and select *XFORM* as the output format. If you want to send the transformed output to an external IB node using the Integration Broker framework, you schedule the query process to run using the Process Scheduler Request page, select the *IB Node* as the output type and *XFORM* as the output format. The page also features a new Approval Required option that enables you to review and approve the transformed output before distributing it.

See “Scheduling and Distributing Query and Connected Query Results with Transformation” in the [Scheduling Queries](#) section.

Note: Query users who have permission to edit the query can add, modify, and delete the XSLT. Query users who have permission to schedule and run the query can select the node output type as well as the XSLT for transformation.

Viewing and Editing Data Transformations for a Query

Use the Transformations page (QRY_TRANSFORM) to view, add, or modify the list of transformation program (XSLT) that are defined for the query.

Navigation:

Reporting Tools > Query > Query Manager > Transformations

The following example shows the fields and controls on the Transformations page. Definitions for the fields and controls follow the example.

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

Query Name QE_QRY_INFORMIX_RLR Description test expr and field - informix Feed

Add XSLT

User Defined Output				
Name	Output File Type	Edit XSLT	Preview	Delete
Demo - Fix	TXT	Edit XSLT	Preview	
htmlTransform	HTML	Edit XSLT	Preview	
prompt_fixFormatTransform	TXT	Edit XSLT	Preview	

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

Return To Search

Field or Control	Description
Add XSLT	Click to access the Transformation Details page, where you can add a new transformation (XSLT) for the selected query. Note: The number of transformations that you can add to a query definition is not limited. You can define how to use each XSLT to convert query data into a document with different formats.
Output File Type	Displays a file extension to be created after the transformation.
Edit XSLT	Click to view and edit the content of the current XSLT.
Preview	Click to view sample output of a query with transformation.
	Click to delete the XSLT from the selected query. After you click the Delete icon, a Delete Confirmation message appears enabling you to either confirm or cancel the deletion.

Defining the Data Transformation for a Query

Use the Transformation Details page (QRYXSLTDETAILS) to add the transformation program (XSLT).

Navigation:

1. Select Reporting Tools, Query, Query Manager.
2. Access the Transformations page and click the **Add XSLT** button.

The following example shows the fields and controls on the Transformation Details page for an XSLT that is used to generate a fixed output. Definitions for the fields and controls follow the example.

Transformation Details

Help

*Name

qe_xrfwin3Fixformat

*Output File Type

TXT

*XSLT

<?xml version='1.0'?>
<xsl:stylesheet xmlns:xsl="http://www.w3.org/1999/XSL/Transform" version="1.0">
 <xsl:output method="text"/>
 <xsl:template match="query">
 Query: QE_SIMPLE3XRFWIN
 <xsl:apply-templates/>
 </xsl:template>
 <xsl:template match="MENU_NAME">
 Menu Name: <xsl:value-of select="." />
 </xsl:template>
 <xsl:template match="DESCR">
 Description: <xsl:value-of select="." />
 </xsl:template>
 <xsl:template match="MENU_GROUP">
 Menu Group: <xsl:value-of select="." />
 <xsl:apply-templates/>
 </xsl:template>
</xsl:stylesheet>

OK

Cancel

Field or Control	Description
Name	Enter the name of the transformation.
Output File Type	Select the file extension to be created after the transformation. The default value is TXT.
XSLT	Enter the XSLT that will be used to transform the XML. Note: To generate a user-defined output format, you need to enter the XSLT that defines how to transform the query data. The output varies based on the XSLT. XSLT should be in the valid XML format. Only basic XML validation will be performed on the user-provided XSLT.

This example illustrates a fixed format output after applying the XSLT to a query data.

```
Query: QE_SIMPLE3XRFWIN

Menu Name:ADMINMOBILE_MENU
Description:
Menu Group:Administer MobileAdminister Mobile

Menu Name:APPLICATION_ENGINE
Description:Application Engine
Menu Group:PeopleSoftPeopleSoft

Menu Name:APPMGMONITOR
Description:Application Message Monitor
Menu Group:PeopleSoftPeopleSoft

Menu Name:ARCHIVING
Description:Data Archival Menu
Menu Group:PeopleSoftPeopleSoft

Menu Name:ARCH_COPY_ALL_VAL
Description:Copy All Criteria Value
Menu Group:

Menu Name:CDM_RPT
Description:
Menu Group:PeopleSoftPeopleSoft

Menu Name:CHART_MENU
Description:
Menu Group:Chart MenuChart Menu

Menu Name:CONFIGMENU
Description:
Menu Group:PeopleSoftPeopleSoft
```


Drilling URLs in PeopleSoft Query

Understanding Drilling URLs

Drilling URLs are the URLs that you define by selecting the menu, component, page, portal object, or URL of choice.

When you build a query using Query Manager, you can define drilling URLs that are associated with this query. These settings are saved into the database, along with prompt, criteria, and so on, as part of the metadata for this query. When you execute this query through Query Manager or Query Viewer, the query results page shows results as links, which you can click to be redirected to a different page in a new browser. Depending on how drilling URLs are defined, the new browser is either a PeopleSoft Pure Internet Architecture page, another query result page, or an external page.

Note: Drilling URLs that were created in earlier PeopleTools releases will work properly in the current release.

In PeopleTools 8.53 and PeopleTools 8.54, queries with Unions always return the URLs from the top level of the Union.

Common Terminology Used to Create Drilling URLs in PeopleSoft Query

<i>Term</i>	<i>Definition</i>
Source Query	A query that defines a Drilling URL.
Destination Query	A query that was defined as a Drilling URL.
Destination Component	A component that was defined as a Drilling URL.

Viewing and Editing Expression Properties

Drilling URLs are a special type of expression that you can define using the Edit Expression Properties page (QRY_QRYURL_SELECT) in Query Manager.

Navigation:

1. Select **Reporting Tools > Query > Query Manager**.
2. Select the Expressions tab, and click the **Add Expression** button.

This example illustrates the fields and controls on the Edit Expression Properties page with the expression type as Drilling URL. Definitions for the fields and controls appear following the example.

Edit Expression Properties

***Expression Type**

Drilling URL 

Expression Text

[Query URL](#)
[Component URL](#)

[External URL](#)
[Attachment URL](#)

[Free Form URL](#)
[Image URL](#)

[REST URL](#)

Term	Definition
Expression type	To define drilling URLs, you must select the <i>Drilling URL</i> option from the Expression type list.
Expression text	Optionally, type the URL in the Expression text text box. Note: You have two options: type the URL in this Expression Text box or click the Query URL, Component URL, or External URL links to allow the appropriate system building URLs. If you type the URL directly into the Expression text box, the system does not validate against a value for the correct format.
Query URL	Click to access the Query URL definition widget, where you can select a query to build URLs in a query URL format.
Component URL	Click to access the Component URL definition widget, where you can select a component to build URLs in a component URL format.
External URL	Click to access the External URL definition widget, where you can enter external URL to build URLs in an external URL format.
Attachment URL	Click to access the Attachment URL definition widget, where you can enter attachment URL to build URLs in an attachment URL format.

Term	Definition
Free Form URL	Click to access the Free Form URL definition widget, where you can manually enter URLs that will be used to build drilling URLs in report results.
Image URL	Click to access the Image URL definition widget, where you can select an image field to build URLs in the image URL format.
REST URL	Click to access the REST definition widget, where you can define the REST drilling URLs for PeopleSoft REST Service that have defined HTTP Get methods.

Note: Drilling URLs are saved into database as an expression, so you can access the Expressions page and add the defined drilling URLs as fields. However, you cannot add drilling URLs as criteria because drilling URLs are special type of expressions. You can add drilling URLs as query fields or columns, and then on the query results page, values in that fields or columns will be expanded to fully qualified URLs, which you can click to either run query, access a PeopleSoft Pure Internet Architecture page, or access an external URL.

See [Defining Expressions](#).

Defining Query Drilling URLs

Page Used to Define Query Drilling URLs

The Query URL widget enables you to use the Select a Query page (QRY_FIELDS) to build drilling URLs in a query URL format.

Navigation:

1. Select **Reporting Tools > Query > Query Manager**.
2. Select the Expressions tab, and click the **Add Expression** button.
3. Select the *Drilling URL* option from the **Expression Type** list and then click the **Query URL** link.

This example illustrates the fields and controls on the Select a Query page. Definitions for the fields and controls appear following the example.

×
Help

Portal Name Q
Node Name Q
Query Name Q
*Format XML

☐ Use psc

Prompt Keys
Select Field
Map Columns

URL Keys

⌵ Q
1-1 of 1

Selection Flag	Key Field Name	Unique Prompt Name	Key Value	Field Lookup		
☐	DEPTID	BIND1		Q	+	-

Select Query Columns

⌵ Q
1-8 of 8

Selection Flag	Unique Field Name	Order By
☐	A.EMPLID	
☐	A.EFFDT	
☐	A.QE_EMPLOYEE_NAME	
☐	A.QE_SOC_SEC_NBR	
☐	A.QE_JOBCODE	
☐	A.DEPTID	

Map URL to Query Columns

⌵ Q
1-8 of 8

Selection Flag	Unique Field Name
☐	A.EMPLID
☐	A.EFFDT
☐	A.QE_EMPLOYEE_NAME
☐	A.QE_SOC_SEC_NBR
☐	A.QE_JOBCODE
☐	A.DEPTID

OK
Cancel

Field or Control	Description
Portal Name	Optionally, enter or select a portal that is used to build drilling URLs at report runtime. Note: If the Portal Name field has no value, PeopleSoft Query uses value <code>%PORTAL</code> to form a drilling URL at report runtime.

Field or Control	Description
Node Name	Optionally, enter or select a node that is used to build drilling URLs at report runtime. If the Node Name field has no value, PSQuery uses value <i>%NODE</i> to form a drilling URL at report runtime.
Use psc (content servlet)	Used to define the content type that is used to build drilling URLs. - Deselect this option to use the portal service (psp) type. By default, this option is deselected. - Select this option to use the content servlet (psc) type.
Query Name	Type a query name in the text box or click the query lookup icon to search for an existing query.
Format	Used to select the format of report results that will be generated from the drilling URLs. Available options are: - XML (XMLP format) If you select the <i>XML</i> option, drilling URL in the Expression Text field includes the <i>ICQryNameXMLURL</i> value. - HTM If you select the <i>HTM</i> option, drilling URL in the Expression Text field includes the <i>ICQryNameURL</i> value. - XLS If you select the <i>XLS</i> option, drilling URL in the Expression Text field includes the <i>ICQryNameExcelURL</i> value.
Prompt Keys	Click to access the Query Search Page where you can search for the prompt criteria of the query that you entered in the Query Name field. If the entered query has prompt criteria, a list of those fields appears in the URL Keys section. If the entered query has no prompt criteria, a message appears saying “Query does not contain any prompt key(s)”. Note: This step is optional. If you do not map any prompt keys to the source query column field, then when you click a drilling URL link in query result column page, you will be directed to the Prompt page, where you can enter prompt key values before retrieving query result.
Select Field	Click to access the Select Query Column section.

Field or Control	Description
Map Columns	Click to display the Map URL to Query Columns section. Note: This step is required for the drilling URLs to be available in a query results page. You can define multiple drilling URLs in a query, but each query result column can only bind with one URL. Therefore, when you click the Column Mapping button, only those fields that have no bond with any URL appear in the Map URL to Query Columns section. If all query columns have bonds with other tracking URLs, then a message appears saying “All columns have already been mapped to other drilling URLs.”
URL Keys	The URL Keys section is available only after you define the Query field and click the Prompt Keys button. In this URL Keys section, you define value mapping between Drilling URL destination query prompt fields and Drilling URL source query result column fields. To map these fields, select the key field by selecting the check box adjacent to a prompt key field, and then click the lookup icon to select the source query column field to map to it. Note: This step is optional. If you do not map any prompt keys to a source query column field, then when you click a drilling URL link on the query result column page, you will be directed to the Prompt page, where you can enter prompt key values before you retrieve query results.
Select Query Column	Select query result columns to form field name and value pairs and to define the order of the appended value pair in the URL. Note: The Select Query Column section is available after you click the Select Field button.
Map URL to Query Columns	The Map URL to Query Columns section is available only after you define the component values and click the Map Columns button. Note: This step is required for the drilling URLs to be available in the query results page. Use the Map Columns button for binding source query result column fields with Drilling URL. You must map URL to query result columns in order for the drilling URLs to be available as links in column fields of the source query results. You can define column mapping by selecting the appropriate check box in the Map URL to Query Columns section.
OK	Click to finish defining the Query URL widget and return to the Edit Expression Properties page.

Searching for Query

Use the Query Search Page (QUERY_URL_SRCH_SPG) to search for the prompt criteria of the query that you entered in the **Query Name** field of the Select a Query page. If the entered query has prompt criteria, a list of those fields appears in the **URL Keys** section. If the entered query has no prompt criteria, a message appears saying “Query does not contain any prompt key(s)”.

Navigation:

1. Select **Reporting Tools > Query > Query Manager**.
2. Select the Expressions tab, and click the **Add Expression** button.
3. Select the *Drilling URL* option from the **Expression Type** list, and click the **Query URL** link.
4. Click the **Prompt Key** button next to the **Query Name** field.

This example illustrates the fields and controls on the Query Search page.

Query Search Page

Query Type: Queries

Query Name:

Query

1-12 of 763

View 100

Query Name	Description	User ID
ADDRESSLIST		Private
ADDRESS_LIST		Private
QAS_TST_MSGITEMS_NOPROMPT	People Tools Message Items	Private
QAS_TST_MSG_ITEMS	Qry>Returns list of msg items	Private
BI_PVG_BILL_VW	Bill Hdr w INV bill status vw	Public
BI_PVG_IVC_VW	Bill Hdr w INV bill status vw	Public
CM_ATTRIBUTES	Attribute mappings	Public
CM_DIM_CTRL_TBL	Dimension Control Table	Public
CM_FACT_CTRL_TBL	Fact Control Table	Public
CM_FACT_MAP_TBL	Fact Map Table	Public
CM_FIELD_PROPERTIES		Public
CM_HIER_CTRL_TBL	Hierarchy Control table	Public

Return

Selecting Query Columns for Existing Drilling URLs

Using the Select Query Column section, you can append field name and value pairs to the end of existing Drilling URL types. The format of the appended field name and value pair is `&FIELDNAME=VALUE`.

For example:

- `'/c/QE_SAMPLE_APPS.QE_DEPT_TBL.GBL?Action=U&DEPTID=%A.DEPTID%&SETID=%A.SETID%EMPLID=00001:A.SETID'`

In this example, the appended field name and value is formed using a static field name, EMPLID, and the static value 00001. At runtime, the drilling URL is expanded as:

```
http://myserver.example.com:8920/ps/ps/EMPLOYEE/QE_LOCAL/c/
QE_SAMPLE_APPS.QE_DEPT_TBL.GBL?
Action=U&DEPTID=10300&SETID=QEDMOEMPLID=00001
```

- `'/c/QE_SAMPLE_APPS.QE_DEPT_TBL.GBL?Action=U&DEPTID=%A.DEPTID%&SETID=%A.SETID%&A.SETID=%A.SETID%&A.DEPTID=%A.DEPTID:A.SETID'`

In this example, the appended field name and value pairs are from two query result columns, A.SETID and A.DEPTID. At runtime, the actual values that are returned in the query results for the A.SETID and A.DEPTID columns replace the %A.SETID% and %A.DEPTID%, as in this URL:

```
http://myserver.example.com:8920/ps/ps/EMPLOYEE/QE_LOCAL/c/
QE_SAMPLE_APPS.QE_DEPT_TBL.GBL?
Action=U&DEPTID=10300&SETID=QEDMO&A.SETID=QEDMO&A.DEPTID=10300
```

Note: The **Expression Text** field in the Edit Expression Properties page is not editable. You can modify existing drilling URLs or define new drilling URLs using available drilling URL widgets.

Processing Existing Drilling URLs at Runtime

At runtime, the query drilling URL feature is able to process all drilling URLs that are created in PeopleTools releases later than 8.50. For example, when you define the same drilling URL:

- PeopleTools 8.50 forms the drilling URL as

```
'/q/?ICAction=ICQryNameURL=PUBLIC.QE_EMP_DESTINATION&BIND1=
A.DEPTID:A.DEPTID'

'/c/QE_SAMPLE_APPS.QE_DEPT_TBL.GBL?Action=U&DEPTID=A.DEPTID&
SETID=A.SETID:A.SETID'
```

- PeopleTools 8.51 forms the drilling URL as

```
'/q/?ICAction=ICQryNameURL=PUBLIC.QE_EMP_DESTINATION&BIND1=
%A.DEPTID:A.DEPTID'

'/c/QE_SAMPLE_APPS.QE_DEPT_TBL.GBL?Action=U&DEPTID=%A.DEPTID%&
SETID=%A.SETID:A.SETID'
```

- PeopleTools 8.52 and later forms the drilling URL as

```
'psp/EMPLOYEE/QE_LOCAL/q/?ICAction=ICQryNameURL=
PUBLIC.QE_EMP_DESTINATION&BIND1=%A.DEPTID:A.DEPTID'

'psp/EMPLOYEE/QE_LOCAL/c/QE_SAMPLE_APPS.QE_DEPT_TBL.GBL?Action=U&
DEPTID= %A.DEPTID%&SETID=%A.SETID:A.SETID'
```

Note: PeopleSoft introduced query drilling URL in PeopleTools 8.50 and added more features in later releases, so drilling URLs created in different releases will look slightly different. However, runtime processing is backward compatible and drilling URLs that have been defined in previous release will be expanded correctly in newer release without the user's need to redefine them.

In PeopleTools 8.50, drilling URLs must be expanded correctly. When you modify a drilling URL that was created in PeopleTools 8.51 or later and then save it in PeopleTools 8.50, the system uses new format and syntax to form the URL. In PeopleTools 8.51 or later, when you run a query with the drilling URLs that were directly upgraded from PeopleTools 8.50, the runtime converts the format differences between the different releases.

Steps Used to Select a Query to Build Drilling URLs

To select a query to build drilling URLs:

1. Select **Reporting Tools > Query > Query Manager**.

The Query Manager search page appears.

2. Click the **Create New Query** link on the Query Manager search page to create a source query, or click the **Search** button and open an existing one.
3. If you create a new source query, click the **Search** button and click the **Add Record** link to select a record for the query.

The Fields page appears.

4. Select the Expressions tab, and click the **Add Expression** button.

The Edit Expression Properties page appears.

5. Select the *Drilling URL* option from the **Expression Type** list.
6. Click the **Query URL** link to define drilling URL for the source query that you just created.

The Select a Query page appears.

7. Optionally, define the portal name, node name, or content type.
8. Type a query name in the **Query Name** text box, or click the lookup icon to search for one from existing queries.
9. Select the format of report results that will be generated from the drilling URLs.
10. Optionally, define value mapping in the **URL Keys** section.

- a. Click the **Prompt Keys** button to bind the prompt keys of the destination query with the columns of the source query.

Note: If the destination query has prompt criteria, the **URL Keys** section appears with a list of key fields.

- b. Define value mapping in the **URL Keys** section by selecting the check box adjacent to a prompt key field, and then clicking the lookup icon to select a source query column field to map to it.

11. Optionally, define query result columns for existing drilling URLs:
 - a. Click the **Select Field** button to display the Select Query Column section.
 - b. Select query result columns to form fieldname and value pairs and to define the order of the appended value pair in the URL.
12. Optionally, define the column mapping in the Map URL to Query Columns section:
 - a. Click the **Map Columns** button to map the drilling URL to a source query selected column.
 - b. Select appropriate values from the **Map URL to Query Columns** section.
13. Click the **OK** button.

The Edit Expression Properties reappears with query drilling URLs in the **Expression Text** field.

This is an example of a drilling URL with the **Use psc** option is not selected, and the **Portal Name** and **Node Name** fields have no values. Notice that, **%PORTAL** and **%NODE** values will be used to build URLs at the report runtime:

```
'psp///q/?ICAction=ICQryNameURL=PUBLIC.DESTINATION&BIND1=A.DEPTID:A.DEPTID'
```

In this example, 'psc// is your selected portal name, node name, and content type; the standard query URL format is /q/? ICAction=ICQryNameURL=PUBLIC.DESTINATION&BIND1=A.DEPTID, and the binding column is A.DEPTID. Thus, this drilling URL is binding with column A.DEPTID.

This is an example of a drilling URL with the **Use psc** option is selected, portal CUSTOMER, and node QE_LOCAL:

```
'psc/EMPLOYEE/QE_LOCAL/q/?ICAction=ICQryNameURL=PUBLIC.QE_EMP_DESTINATION:
A.QE_EMPLOYEE_NAME'
```

In this example, 'psc/EMPLOYEE/QE_LOCAL is your selected portal name, node name, and content type.

Note that, a query drilling URL:

- Always includes /q/.
- Is saved as part of expression metadata for the query.
- Contains two parts: query URL format and query result columns binding with the Drilling URL.

14. Save your query.
15. Select **Reporting Tools > Query > Query Manager**.

Alternatively, select **Reporting Tools > Query > Query Viewer**.

16. Click the **HTML** link or the **Download to Excel** link.

The query results page displays results as links. When you click these links, the destination query is run using prompt key values that are defined using the source query.

Defining Component Drilling URLs

Page Used to Define Component Drilling URLs

The Component URL widget enables you to use the Select a Component page (QRY_COMPURL_SELECT) to build drilling URLs in component URL format. When you click the **Component URL** link in the Edit Expression Properties page to access the Select a Component page, a PeopleSoft Pure Internet Architecture page is launched.

Note: The Component URL widget is only used for pages that have the **Action** field set to **Update/Display**.

Navigation:

1. Select **Reporting Tools > Query > Query Manager**.
2. Select the Expressions tab, and click the **Add Expression** button.
3. Select the *Drilling URL* option from the **Expression Type** list and click the **Component URL** link.

This example illustrates the fields and controls on the Select a Component page. Definitions for the fields and controls appear following the example.

Select a Component

Portal NameEMPLOYEE

Node NameEMPL

Content Reference

PROCESS_SCHEDULER

Add Content Reference Link

*Menu Name

GBL

*Market

PTSCHEDULER

Page

Menu Action

Search Keys

Select Field

Map Columns

URL Keys

Selection Flag

Field Name

Key Value

Field Lookup

PTSCHDL_NAME

Select Query Columns

Selection Flag

Unique Field Name

Order By

A.EMPLID

A.EFFDT

A.QE_EMPLOYEE_NAME

A.QE_FIRST_NAME

A.QE_LAST_NAME

A.QE_SOC_SEC_NBR

A.QE_JOBCODE

A.DEPTID

Map URL to Query Columns

Selection Flag

Unique Field Name

A.EFFDT

A.QE_FIRST_NAME

A.QE_LAST_NAME

A.QE_SOC_SEC_NBR

A.QE_JOBCODE

A.DEPTID

OK

Cancel

Field or Control	Description
Portal Name	Optionally, enter or select a portal that is used to build drilling URLs at the report runtime. Note: If the Portal Name field has no value, PeopleSoft Query uses the value <code>%PORTAL</code> to form a drilling URL at the report runtime.
Node Name	Optionally, enter or select a node that is used to build drilling URLs at the report runtime. If the Node Name field has no value, PeopleSoft Query uses the value <code>%NODE</code> to form a drilling URL at the report runtime.

Field or Control	Description
Use psc (content servlet)	Used to define the content type that is used to build drilling URLs. - Deselect this option to use the portal service (psp) type. By default, this option is deselected. - Select this option to use the content servlet (psc) type.
Content Reference	Enter the name of a content reference or use the Add Content Reference Link link to select a content reference from an existing list. See “Administering Content References” (Portal Technology).
Add Content Reference Link	Click to access the Select a Content Reference or Content Reference Link page, where you can select a content reference or content reference link. Note: The values of the Menu Name, Market, and Component fields are populated if you select a content reference or content reference link using the Add Content Reference Link link.
Menu Name	Enter a menu name or click the lookup icon and select one menu name from an existing list. Otherwise, the menu name value is populated if you select a content reference or content reference link using the Add Content Reference Link link.
Market	Enter a market code or click the lookup icon and select one market code from an existing list. The market code is populated automatically if you select a content reference or content reference link using the Add Content Reference Link link.
Component	Enter a component name or click the lookup icon and select one component name from an existing list. Otherwise, the component name value is populated if you select a content reference or content reference link using the Add Content Reference Link link.

Field or Control	Description
Menu Action	Select an action type to associate with the component. When you run the query, a component drilling URL expands with correct action mode within the URL. For different component actions, the drilling URL will be constructed differently. When you click the component drilling URL from the query results page, it opens the target component with the correct action mode. The available menu actions are: • Add The URL will include <i>Action=A</i>. Clicking the URL opens the target component at the Add a New Value page. • Update/Display The URL will include <i>Action=U</i>. Clicking the URL opens the target component at the Find an Existing Value page. • Update/Display All The URL will include <i>Action=L</i>. Clicking the URL opens the target component at the Find an Existing Value page with the Include History option selected by default. • Correction The URL will include <i>Action=C</i>. Clicking the URL opens the target component at the Find an Existing Value page with the Correct History option selected by default. Note: The Menu Action lists the actions that were granted to the selected component when the component was created using Application Designer. If you have defined mapping between query result columns and all of the component search key fields, then clicking the component drilling URL will bypass the search page and open the main page directly.

Field or Control	Description
Search Keys	Click to select mapping between component search keys and source query result columns. If the entered component has a search key, a list of those search keys appears in the URL Keys section. If the entered component has no search key, a message appears saying “Component does not contain any search keys”. Note: This step is optional. If you do not map any search keys to the source component, then when you click a drilling URL link in the query result column page, you will be directed to a component search page, where you can select search key values.
Select Field	Click to display the Select Query Column section.
Map Columns	Click to display the Map URL to Query Columns section. Note: This step is required for the drilling URLs to be available in query results page. You can define multiple drilling URLs in a query, but each query result column can only bind with one URL. When you click the Map Columns button, only those fields that have no bond with any URL appear in the Map URL to Query Columns section. If all query columns have bonds with other tracking URLs, then a message appears saying “All columns have already been mapped to other drilling URLs.”
URL Keys	The URL Keys section is available only after you define the component and click the Search Keys button. In this URL Keys section, you define value mapping between Drilling URL destination component search keys and Drilling URL source query result column fields. To map these fields, you can either select the key field and then click the lookup icon to select source query column field to map to it, or enter static values as mapping value directly into the Field Value field. Similarly, in the Key Value field, you can either manually enter the key name or search for existing keys from the component. You can also add or delete key values using the Add or Delete button. Note: This step is optional. If you do not map any search keys to the source component, then when you click a drilling URL link in query result column page, you will be directed to a component search page, where you can enter search key values before you launch the component.
Select Query Column	Select query result columns to form fieldname and value pairs and to define the order of the appended value pair in the URL.

Field or Control	Description
Map URL to Query Columns	The Map URL to Query Columns section is available only after you define the component values and click the Map Columns button. Note: This step is required for the drilling URLs to be available in the query results page. Use the Map Columns button for binding source query result column fields with a Drilling URL. You must map URLs to query result columns in order for the drilling URLs to be available as links in column fields of the source query results. You can define column mapping by selecting the appropriate check box in this Map URL to Query Columns section.
OK	Click to finish defining a Component URL widget and return to the Edit Expression Properties page.

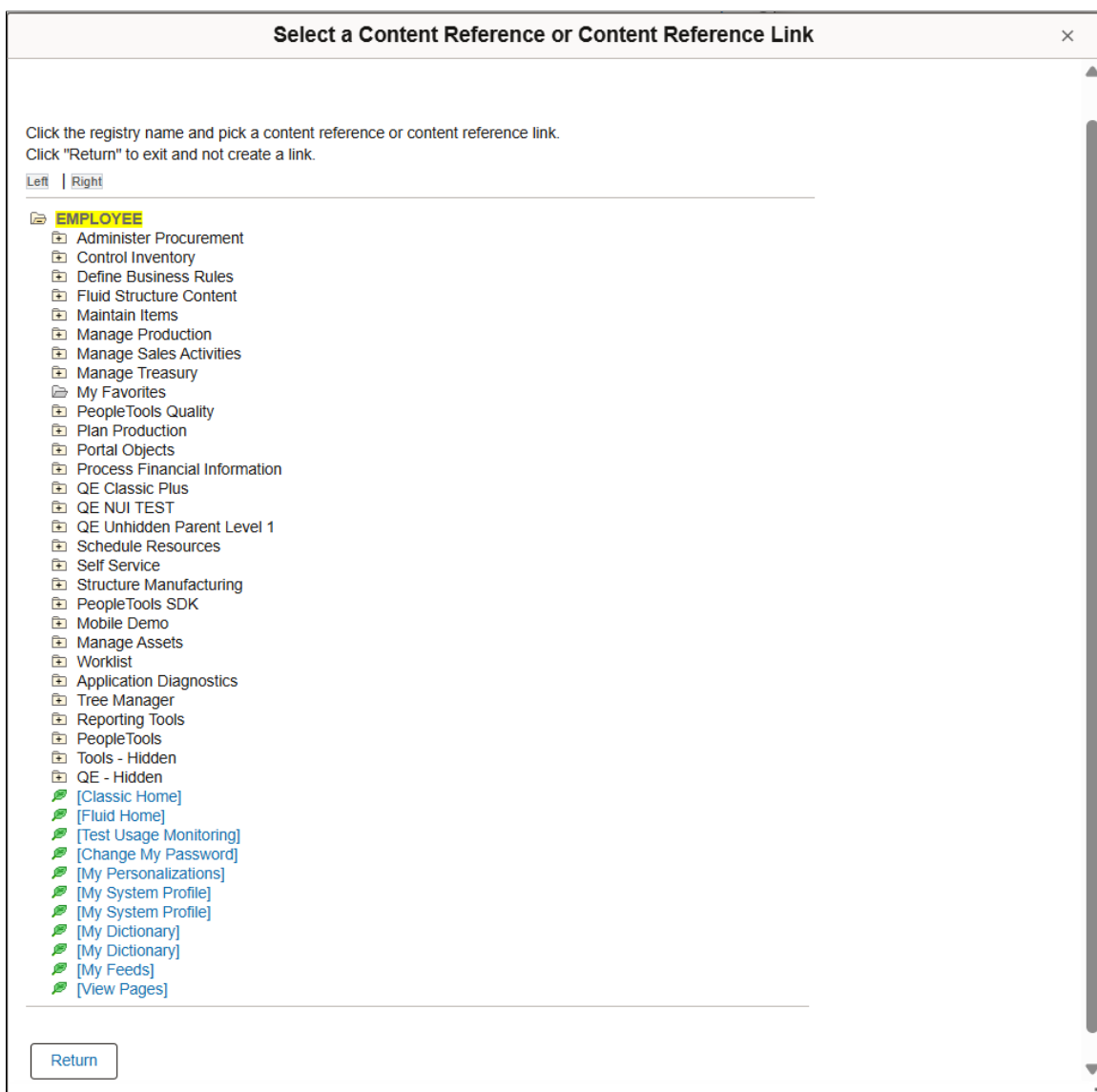
Selecting a Content Reference or Content Reference Link

Use the Select a Content Reference or Content Reference Link page (QRY_CREFURL_SELECT) to select a content reference or content reference link.

Navigation:

1. Select **Reporting Tools > Query > Query Manager**.
2. Select the Expressions tab, and click the **Add Expression** button.
3. Select the *Drilling URL* option from the **Expression Type** list, and click the **Component URL** link.
4. Click the **Add Content Reference Link** link.

This example illustrates the fields and controls on the Select a Content Reference or Content Reference Link page.



Steps Used to Select a Component to Build Drilling URLs

To select a component to build drilling URLs:

1. Select **Reporting Tools > Query > Query Manager**.

The Query Manager search page appears.

2. Click the **Create New Query** link on the Query Manager search page to create a source query, or click the **Search** button and open an existing one.
3. If you create a new source query, click the **Search** button and click the **Add Record** link to select a record for the query.

The Fields page appears.

4. Select the Expressions tab, and click the **Add Expression** button.

The Edit Expression Properties page appears.

5. Select the *Drilling URL* option from the **Expression Type** list.
6. Click the **Component URL** link to define a drilling URL for the source query that you just created.

The Select a Component page appears.

7. Optionally, define the portal name, node name, or content type.
8. Type a content reference in the text box or click the **Add Content Reference Link** link to select one from existing components.
9. If needed, define the values for the **Menu Name**, **Market**, and **Component** fields.
10. Optionally, define value mapping in the **URL Keys** section.

In the **Field Value** and **Key Name** fields, either use the lookup icon to select a source query column field to map to it, or enter static values as mapping value directly into the fields.

Note: If the selected component has a search key, the **URL Keys** section appears with a list of search key fields after you click the lookup icon.

11. Optionally, define query result columns for existing drilling URLs:
 - a. Click the **Select Field** button to display the Select Query Column section.
 - b. Select query result columns to form fieldname and value pairs and to define the order of the appended value pair in the URL.
12. Optionally, define the map columns in the Map URL to Query Columns section.
 - a. Click the **Map Columns** button to map the drilling URL to a source query selected column.
 - b. Select appropriate values from the **Map URL to Query Columns** section.
13. Click the **OK** button.

The Edit Expression Properties page appears with a component drilling URL in the **Expression Text** field.

This is an example of a component drilling URL with the **Use psc** option is not selected, and the **Portal Name** and **Node Name** fields have no values. Notice that, *%PORTAL* and *%NODE* values will be used to build URLs at the report runtime:

```
'psp///c/QE_SAMPLE_APPS.QE_DEPT_TBL.GBL?Action=U&DEPTID=%A.DEPTID%&
SETID=PLEASANTON:A.EMPLID'
```

This is an example of a component drilling URL with the **Use psc** option is selected, portal **CUSTOMER**, and node **QE_LOCAL**:

```
'psc/CUSTOMER/QE_LOCAL/c/QE_SAMPLE_APPS.QE_DEPT_TBL.GBL?Action=U&
DEPTID=%A.DEPTID%&CITY=PLEASANTON:A.EMPLID'
```

In this example, 'psc/CUSTOMER/QE_LOCAL is your selected portal name, node name, and content type; &DEPTID=%A.DEPTID is your static value as key value; and &CITY=PLEASANTON is your entered key name and key value.

Note that, a component drilling URL:

- Always includes /c/.
- Is saved as part of expression metadata for the query.
- Contains two parts: component URL format and query result columns binding with the drilling URL.

14. Save your query.

15. Select **Reporting Tools > Query > Query Manager**.

Alternatively, select **Reporting Tools > Query > Query Viewer**.

16. Click the **HTML** link or the **Download to Excel** link.

The query results page displays results as links. When you click these links, destination query is run using the prompt key value that is defined using the source query.

Defining External Drilling URLs

Page Used to Define External Drilling URLs

The External URL widget enables you to use the Enter an External URL page (QRY_URL_SELECT) to build drilling URLs in an external URL format; when you click the **External URL** link in the Edit Expression Properties page to access the Enter an External URL page, you are directed to an external page.

Navigation:

1. Select **Reporting Tools > Query > Query Manager**.
2. Select the Expressions tab, and click the **Add Expression** button.
3. Select the *Drilling URL* option from the **Expression Type** list and click the **External URL** link.

This example illustrates the fields and controls on the Enter an External URL page. Definitions for the fields and controls appear following the example.

Enter an External URL

Help

Portal Name

CUSTOMER

Node Name

ATOM

URLID

https://www.yahoo.com

Select Field

Map Columns

Select Query Columns

<

<

1-1 of 1

>

>

Selection Flag	Unique Field Name	Order By
☐	A.ATTRIBUTE_NAME	

Map URL to Query Columns

<

<

1-1 of 1

>

>

Selection Flag	Unique Field Name
☐	A.ATTRIBUTE_NAME

OK

Cancel

Note: Query URL and component URL have a certain format for key list values in the URL. However, external URL has no key mapping widget because external URL is free-format URL.

Field or Control	Description
Portal Name	Optionally, enter or select a portal that is used to build drilling URLs at the report runtime. Note: If the Portal Name field has no value, PeopleSoft Query uses the value <code>%PORTAL</code> to form a drilling URL at the report runtime.
Node Name	Optionally, enter or select a node that is used to build drilling URLs at the report runtime. If the Node Name field has no value, PeopleSoft Query uses the value <code>%NODE</code> to form a drilling URL at the report runtime.
Use psc (content servlet)	Used to define the content type that is used to build drilling URLs. • Deselect this option to use the portal service (psp) type. By default, this option is deselected. • Select this option to use the content servlet (psc) type.
URL	Enter the value of the external URL. Note: There is no format restriction.
Select Field	Click to display the Select Query Column section.
Map Columns	After you enter URL value, click this button to display the Map URL to Query Columns section. Note: This step is required for the drilling URLs to be available in the query results page. You can define multiple drilling URLs in a query, but each query result column can only bind with one URL. When you click the Map Column button, only those fields that have no bond with any URL appear in the Map URL to Query Columns section. If all query columns have bonds with other tracking URLs, then a message appears saying “All columns have already been mapped to other drilling URLs.”
Select Query Column	Select query result columns to form fieldname and value pairs and to define the order of the appended value pair in the URL.

Field or Control	Description
Map URL to Query Columns	The Map URL to Query Columns section is available only after you define the component values and click the Map Columns button. Note: This step is required for the drilling URLs to be available in query results page. Use the Map Columns button for binding source query result column fields with a Drilling URL. You must map URL to query result columns in order for the drilling URLs to be available as links in column fields of source query results. You can define column mapping by selecting an appropriate check box in this Map URL to Query Columns section.
OK	Click to complete defining External URL widget and return to the Edit Expression Properties page.

Steps Used to Enter External URLs to Build Drilling URLs

To enter an external URL to build drilling URLs:

1. Select **Reporting Tools > Query > Query Manager**.

The Query Manager search page appears.

2. Click the **Create New Query** link on the Query Manager search page to create a source query, or click the **Search** button and open an existing one.
3. If you create a new source query, click the **Search** button and click the **Add Record** link to select a record for the query.

The Fields page appears.

4. Select the Expressions tab, and click the **Add Expression** button.

The Edit Expression Properties page appears.

5. Select the *Drilling URL* option from the **Expression Type** list.
6. Click the **External URL** link to define drilling URL for the source query that you just created.

The Enter an External URL page appears.

7. Optionally, define the portal name, node name, or content type.
8. Type a valid URL in the **External URL** edit box.
9. Optionally, define query result columns for existing drilling URLs:
 - a. Click the **Select Field** button to display the Select Query Column section.

- b. Select query result columns to form fieldname and value pairs and to define the order of the appended value pair in the URL.
10. Optionally, define the column mapping in the **Map URL to Query Columns** section.
 - a. Click the **Map Columns** button to map the drilling URL to source query selected column.
 - b. Select appropriate values from the **Map URL to Query Columns** section.
11. Click the **OK** button.

The Edit Expression Properties reappears with query drilling URLs in the **Expression Text** field.

This is an example of an external drilling URL with the **Use psc** option is not selected, and the **Portal Name** and **Node Name** fields have no values. Notice that, *%PORTAL* and *%NODE* values will be used to build URLs at the report runtime: 'psp//e/?url=[http://www.oracle.com]:A.DEPTID'.

This is an example of an external drilling URL with the **Use psc** option is selected, portal **EMPLOYEE**, and node **QE_LOCAL**: 'psp/EMPLOYEE/QE_LOCAL/e/?url=[http://www.oracle.com]:A.DEPTID'. In this example, 'psp/EMPLOYEE/QE_LOCAL' is your selected portal name, node name, and content type.

Note: An external drilling URL always includes /e/.

12. Save your query.
13. Select **Reporting Tools > Query > Query Manager**.

Alternatively, select **Reporting Tools > Query > Query Viewer**.

14. Click the **HTML** link or the **Download to Excel** link.

The query results page displays results as links. When you click these links, destination query is run using prompt key value that is defined using the source query.

Defining Attachment Drilling URLs

Page Used to Define Attachment Drilling URLs

The Attachment URL widget enables you to use the Enter an Attachment URL page (QRY_ATTURL_SELECT) to build drilling URLs in an attachment URL format.

Navigation:

1. Select **Reporting Tools > Query > Query Manager**.
2. Select the Expressions tab, and click the **Add Expression** button.
3. Select the *Drilling URL* option from the **Expression Type** list, and click the **Attachment URL** link.

This example illustrates the fields and controls on the Enter an Attachment URL page. Definitions for the fields and controls appear following the example.

Enter an Attachment URL ×

[Help](#)

*URL Type Internal URL ▼

Portal Name EMPLOYEE Q

Node Name PT_LOCAL Q

*URL Id FILEDB Q

*File Name Field A.ATTRIBUTE_NAME Q

☐ Use psc

System attachment table

Select Field
Map Columns

Select Query Columns

Q
1-1 of 1

Selection Flag	Unique Field Name	Order By
☐	A.ATTRIBUTE_NAME	

Map URL to Query Columns

Q
1-1 of 1

Selection Flag	Unique Field Name
☐	A.ATTRIBUTE_NAME

OK
Cancel

Field or Control	Description
URL Type	Available options are <i>Internal URL</i> and <i>External URL</i> .
Portal Name	If the attachment URL is internal, optionally enter or select a portal that is used to build drilling URLs at the report runtime. Note: If the Portal Name field has no value, PeopleSoft Query uses the value <i>%PORTAL</i> to form a drilling URL at the report runtime.
Node Name	If the attachment URL is internal, optionally enter or select a node that is used to build drilling URLs at the report runtime. If the Node Name field has no value, PeopleSoft Query uses the value <i>%NODE</i> to form a drilling URL at the report runtime.

Field or Control	Description
Use psc (content servlet)	If the attachment URL is internal, define the content type that is used to build drilling URLs. - Deselect this option to use the portal service (psp) type. By default, this option is deselected. - Select this option to use the content servlet (psc) type.
URL ID	Select a query field that will be used for attachment file name. Note: The URL IDs are set in this folder: PeopleTools\Utilities\Administration\URLs.
Select Field	Click to display the Select Query Column section.
Map Columns	After you enter URL value, click this button to display the Map URL to Query Columns section. Note: This step is required for the drilling URLs to be available in the query results page. You can define multiple drilling URLs in a query, but each query result column can only bind with one URL. When you click the Map Column button, only those fields that have no bond with any URL appear in the Map URL to Query Columns section. If all query columns have bonds with other tracking URLs, then a message appears saying “All columns have already been mapped to other drilling URLs.”
Select Query Column	Select query result columns to form field name and value pairs and to define the order of the appended value pair in the URL.
Map URL to Query Columns	This section is available only after you define the component values and click the Map Columns button. Note: This step is required for the drilling URLs to be available in query results page. Use the Map Columns button for binding source query result column fields with a Drilling URL. You must map URL to query result columns in order for the drilling URLs to be available as links in column fields of source query results. You can define column mapping by selecting an appropriate check box in this Map URL to Query Columns section.
OK	Click to complete defining External URL widget and return to the Edit Expression Properties page.

Steps Used to Enter Attachment URLs to Build Drilling URLs

To enter an attachment URL to build drilling URLs:

1. Select **Reporting Tools > Query > Query Manager**.

The Query Manager search page appears.

2. Click the **Create New Query** link on the Query Manager search page to create a source query, or click the **Search** button and open an existing one.
3. If you create a new source query, click the **Search** button and click the **Add Record** link to select a record for the query.

The Fields page appears.

4. Select the Expressions tab, and click the **Add Expression** button.

The Edit Expression Properties page appears.

5. Select the *Drilling URL* option from the **Expression Type** list.
6. Click the **Attachment URL** link to define drilling URL for the source query that you just created.

The Enter an Attachment URL page appears.

7. Select an URL type.

Note: The **Portal Name** field, **Node Name** field, and **Use psc** option are not active if the URL type is set to *External URL*.

8. If the attachment URL is internal, optionally define the portal name, node name, or content type for internal URL.
9. Select an URL ID and a file name field.
10. Optionally, define query result columns for existing drilling URLs:
 - a. Click the **Select Field** button to display the Select Query Column section.
 - b. Select query result columns to form fieldname and value pairs and to define the order of the appended value pair in the URL.
11. Optionally, define the column mapping in the **Map URL to Query Columns** section.
 - a. Click the **Map Columns** button to map the drilling URL to source query selected column.
 - b. Select appropriate values from the **Map URL to Query Columns** section.
12. Click the **OK** button.

The Edit Expression Properties reappears with query drilling URLs in the **Expression Text** field.

- If URL type is *external*, its attachment drilling URL always begins with '%URLID:'. For example: '%URLID:FILEDB%%A.SETID%:A.EFFDT'.

At runtime, this external URL is expanded to `record://PSFILE_ATTDET1`.

Notice that drilling URL runtime replaces %A.SETID% with actual query field column value of 1. Drilling URL runtime also replace FILEDB with record://PSFILE_ATTDET. FILEDB is defined as record://PSFILE_ATTDET in the URL page that can be set using this navigation path: **PeopleTools > Utilities > Administration > URLs.**

- If URL type is *internal*, its attachment drilling URL always includes '/s/'. For example: 'psc/EMPLOYEE/QE_LOCAL/s/WEBLIB_FILEHTTP.ISCRIPT1.FieldFormula.IScript_GetAttachment?urlid=FILEDB&filename=%A.SETID%A.QE_JOBCODE'.

At runtime, this internal URL is expanded to:

```
http://myserver.example.com:8920/psc/QEDMO/EMPLOYEE/QE_LOCAL/s/WEBLIB_FILEHTTP.ISCRIPT1.FieldFormula.IScript_GetAttachment?urlid=FILEDB&filename=%25A.SETID%25
```

Notice that drilling URL runtime replaces %A.SETID% with actual query field column value 25.

13. Save your query.

Defining Free Form Drilling URLs

The Free Form URL widget enables you to use the Define a Free Form Drilling URL page (QRY_FREEURL_SELECT) to manually enter URLs that will be used to build drilling URLs in report results.

Navigation:

1. Select **Reporting Tools > Query > Query Manager.**
2. Select the Expressions tab, and click the **Add Expression** button.
3. Select the *Drilling URL* option from the **Expression Type** list and click the **Free Form URL** link.

This example illustrates the fields and controls on the Define a Free Form Drilling URL page.

You can define free-form drilling URLs using the following elements:

- Static text; for example, *http://www.oracle.com*.
- Query result columns; for example, *%A.EMPLID%*, *%B.DEPID%*.
- Portal system variable.

Note: Application engine program may not recognize portal system variable if query API is called from an undetermined context.

Portal system variables is case-sensitive.

The following table lists the portal system variables that PeopleSoft Query supports.

<i>Portal System Variable</i>	<i>Portal System Variable</i>	<i>Portal System Variable</i>
%AuthenticationToken	%ClientDate	%ClientTimeZone
%ContentID	%ContentType	%Copyright
%Currency	%Date	%DateTime
%DbName	%DbServerName	%DbType
%EmailAddress	%EmployeeId	%HPTabName
%IsMultiLanguageEnabled	%Language	%Language_Base
%LocalNode	%Market	%MaxMessageSize

<i>Portal System Variable</i>	<i>Portal System Variable</i>	<i>Portal System Variable</i>
%NavigatorHomePermissionList	%Node	%PasswordExpired
%Portal	%PrimaryPermissionList	%ProcessProfilePermissionList
%RowSecurityPermissionList	%RunningInPortal	%ServerTimeZone
%Time	%UserDescription	%UserId

Note: Unlike other type of drilling URLs, PeopleSoft Query uses portal service (psp) to construct free-form drilling URLs during the report runtime. PeopleSoft recommends you to include the portal name and the node name as part of the URL. At the report runtime, query processing manager (QPM) uses current running context to determine protocol, host, and port, and then concatenates those values with drilling URL itself to form a full URL.

Defining Image Drilling URLs

The Image URL widget enables you to use the Select a Query page to build URLs in the image URL format.

Navigation:

1. Select **Reporting Tools > Query > Query Manager**.
2. Select the Expressions tab, and click the **Add Expression** button.
3. Select the *Drilling URL* option from the **Expression Type** list and click the **Image URL** link.

This example illustrates the fields and controls on the Select a Query page showing image query and the binds for the Image URLs.

Select a Query

Portal Name

Node Name

Query Name

*Image Field Name

Prompts

Select Field

Map Columns

Query does not contain any prompt key(s).

Keys

Personalize | Find |

First 1 of 1 Last

	Selection Flag	Key Field Name	Key Value	Field Lookup
1	☐	EMPLID	A.EMPLID	

Select Query Columns

Find |

First 1-4 of 4 Last

Selection Flag	Unique Field Name	Order By
☐	A.EMPLID	
☐	B.QE_EMPLOYEE_NAME	
☐	B.QE_JOBCODE	
☐	A.QE_QRY_PHOTO_BMP	

Map URL to Query Columns

Find |

First 1-4 of 4 Last

Selection Flag	Unique Field Name
☐	A.EMPLID
☐	B.QE_EMPLOYEE_NAME
☐	B.QE_JOBCODE
☐	A.QE_QRY_PHOTO_BMP

This example illustrates the fields and controls on the Edit Expression Properties page. Image URL is created in the Expression Text box.

Edit Expression Properties

***Expression Type**
 Drilling URL

Expression Text

```
'pscl//q
/?ICAction=ICQryImageUrl=PUBLIC.QE_QRY_BMP_LINK&
IMGFIELD=QE_QRY_PHOTO_BMP&
IMGRECORD=QE_QRY_BMP2&EMPLID=%A.EMPLID%'
```

[Query URL](#) [Component URL](#)

[External URL](#) [Attachment URL](#)

[Free Form URL](#) [Image URL](#)

[REST URL](#)

See “Using the Search Test Page” (Search Technology).

Defining REST Drilling URLs

REST Drilling URL Overview

Report developers may use a REST (REpresentational State Transfer) drilling URL to allow the user to drill down from the query result set, or a report based on the query, into a PeopleSoft defined Rest Web Service URL. This feature and the newly introduced BI Publisher REST Web Service, would allow the user to drill down from a query, or even a formatted query-based report, directly into another formatted (BIP) report.

In general, you are able to drill down from the query results or a formatted query-based report into another query using the Query Drilling URL feature. However, if the parent query containing the drilling URL is used as a data source for a formatted report (such as an nVision report, BI Publisher report, or Pivot Grid chart), Oracle PeopleSoft recommends that you use the REST Drilling URL feature and the BIP Web Service so that the drilling URLs can drill into a formatted report. When defining a drilling URL to the BIP Rest Service, all supported report output parameters, such as the report definition ID, output format, template ID, and language code, can be defined as a part of the drilling URL. In addition, the required query prompt values for the drilling report can be mapped to field values in the parent query.

You can define REST drilling URLs to drill down into the BIP REST Service or any PeopleSoft REST Service that has a defined HTTP Get method. REST drilling URLs behave similarly to other types of drilling URLs that are available in Query Manager; in that they can be defined as separate fields in the query results or mapped to the output fields in the parent query to be used as links for the output fields.

Note that:

- REST Web Service drilldown is available only for Service Operations using the HTTP GET method.

Only REST services with defined HTTP Get methods are available for users to select when they define REST drilling URLs because query drilling URLs are based on a simple HTTP Get Request URL.

- The BIP REST Service is available only for non-bursted reports.

Only a non-bursted report is supported because a BIP REST service synchronously returns report output to the calling application or browser.

- BIP REST Services are available only for query-based reports.

Reports based on an XML file-based data source (including the desupported Rowset and XMLDoc data source types) require an XML file to be created and provided at runtime; therefore, reports based on XML file-based data sources are not supported using a simple HTTP Get Request URL.

- Connected Query based reports cannot be used with the REST drilling URL feature.

Potentially, these reports can generate an extremely large result that may introduce performance issues if run synchronously with the intention of viewing the report output immediately.

Terminology

<i>Term</i>	<i>Definition</i>
REST Web Services	PeopleSoft Defined Consumer or Provider REST (Representational State Transfer) Web Services

Note: All references to the term *REST Services* in this documentation indicate a *REST Get Service Operation* specifically because the REST Drilling URL feature only supports REST Web Services that have a defined HTTP Get Method.

BI Publisher Report Web Service

The BI Publisher Report Web Service is a REST Web Service used to run a BI Publisher report using an HTTP Get Method (HTTP URL). You can use the REST Service to synchronously run a BI Publisher report and immediately view the output in the requested format. The combination of required and optional URL components provide the flexibility of running a BI Publisher report using either the report default settings or using specified overrides (for Template ID, Output Format, and Language Code). In addition, prompt values must also be specified if required by the underlying query used by the BI Publisher report.

This example illustrates the General page (**PeopleTools > Integration Broker > Integration Setup > Service Operation Definitions**) displaying the defined Get Method service operation that will service the REST URL requests. The URI section displays the available URI templates.

General | Handlers | Routings

Service Operation: BIP_RUNREPORT_REST_GET
 REST Method: GET
 *Operation Description: BIP Run Report
 Operation Comments:
 Owner ID: PeopleTools
 Operation Alias: BIPRunReport

☒ User/Password Required
 *Req Verification: Basic Authentication and
[Service Operation Security](#)
☐ Used with Think Time Methods

REST Resource Definition

REST Base URL: `http://slc05aql.us.oracle.com:80/PSIGW/RESTListeningConnector/QE_LOCAL/BIPRunReport.v1/`
 URI Template Format Example: `weather/{state}/{city}?forecast={day}`

Index	Template	Validate	Build		
1	{ReportID}	Validate	Build	+	-
2	{ReportID}?format={OutputFormat}	Validate	Build	+	-
3	{ReportID}?langcd={LangCode}	Validate	Build	+	-
4	{ReportID}?prompts={Query_PromptColl*}	Validate	Build	+	-
5	{ReportID}?format={OutputFormat}&langcd={LangCode}&prompts={Query_PromptColl*}	Validate	Build	+	-
6	{ReportID}?format={OutputFormat}&langcd={LangCode}	Validate	Build	+	-
7	{ReportID}?format={OutputFormat}&prompts={Query_PromptColl*}	Validate	Build	+	-
8	{ReportID}?langcd={LangCode}&prompts={Query_PromptColl*}	Validate	Build	+	-
9	{ReportID}/{TemplateID}	Validate	Build	+	-
10	{ReportID}/{TemplateID}?format={OutputFormat}	Validate	Build	+	-
11	{ReportID}/{TemplateID}?langcd={LangCode}	Validate	Build	+	-
12	{ReportID}/{TemplateID}?prompts={Query_PromptColl*}	Validate	Build	+	-
13	{ReportID}/{TemplateID}?format={OutputFormat}&langcd={LangCode}&prompts=	Validate	Build	+	-
14	{ReportID}/{TemplateID}?format={OutputFormat}&langcd={LangCode}	Validate	Build	+	-
15	{ReportID}/{TemplateID}?format={OutputFormat}&prompts={Query_PromptColl*}	Validate	Build	+	-
16	{ReportID}/{TemplateID}?langcd={LangCode}&prompts={Query_PromptColl*}	Validate	Build	+	-

Document Template: BIP_RUNREPORT_TEMPL.V1 [View Message](#)

The simplest URI template is: `http://<server>/PSIGW/RESTListeningConnector/QE_LOCAL/BIPRunReport.v1/{ReportID}`.

The most complex URI template is: `http://<server>/PSIGW/RESTListeningConnector/QE_LOCAL/BIPRunReport.v1/{ReportID}/{TemplateID}?format={OutputFormat}&langcd={LangCode}&prompts={Query_PromptColl*}`.

Note that:

- The *Report ID* element is always required and denotes the Report Definition ID of the report to be run.

All other elements in the URL are optional. If any element other than *Report ID* is omitted, then the default value for that parameter as defined in the Report Definition is used when the system runs the report.

- The *Query_PromptColl** element is a collection element and represents query prompt values for the underlying query that the report definition is based on.

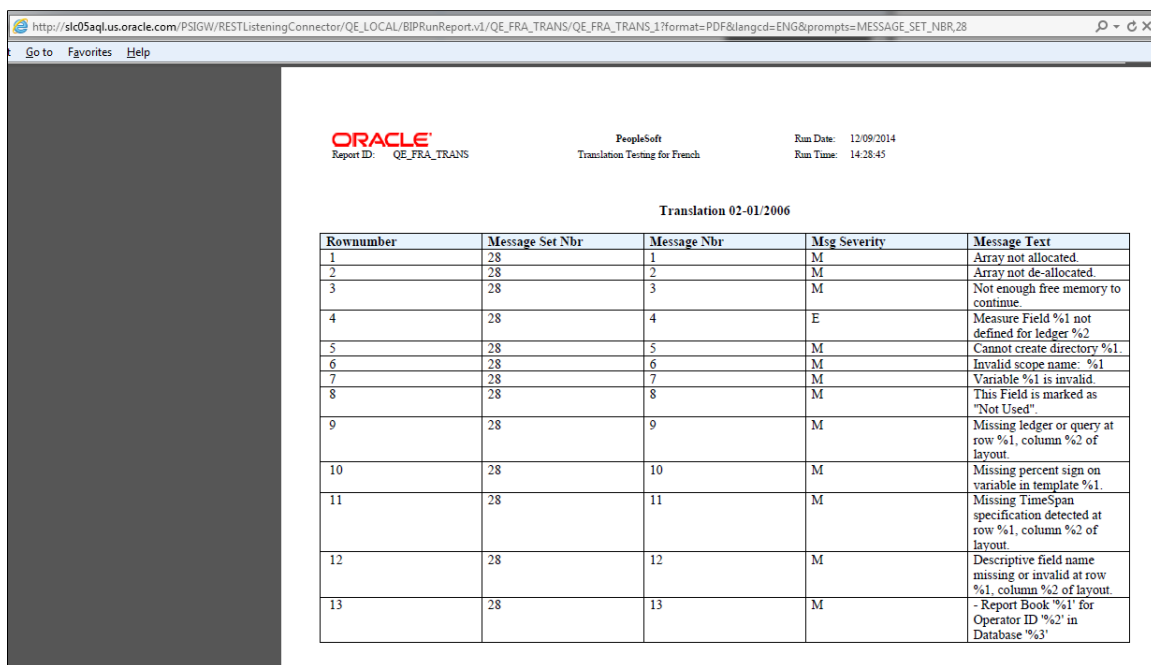
The query prompt values need to be specified as a comma-separated sequence of name-value pairs. For eg., "...&prompts=<prompt1>,<value1>,<prompt2>,<value2>,...", where *promptn* is the Prompt Field Name as defined in the Query definition. In case there are any duplicate Field Names in the list of prompts, the Unique Prompt Name should instead be substituted for the Field Name for these specific prompt fields only.

These are two examples of the fully qualified URLs for the simplest and most complex URI templates mentioned previously:

- This is the fully qualified URL when the simplest URI template is used: `http://<server>:80/PSIGW/RESTListeningConnector/QE_LOCAL/BIPRunReport.v1/XRFWIN.`
- This is the fully qualified URL when the most complex URI template is used:
`http://<server>:80/PSIGW/RESTListeningConnector/
QE_LOCAL/BIPRunReport.v1/QE_FRA_TRANS/QE_FRA_TRANS_1?
format=PDF&langcd=ENG&prompts=MESSAGE_SET_NBR,28.`

The web service response content is the report output file in one of the four output formats (as per users request or the default).

This example illustrates the report output file returned in browser after executing the complex URL request from the previous example.



Rownumber	Message Set Nbr	Message Nbr	Msg Severity	Message Text
1	28	1	M	Array not allocated.
2	28	2	M	Array not de-allocated.
3	28	3	M	Not enough free memory to continue.
4	28	4	E	Measure Field %1 not defined for ledger %2
5	28	5	M	Cannot create directory %1.
6	28	6	M	Invalid scope name: %1
7	28	7	M	Variable %1 is invalid.
8	28	8	M	This Field is marked as "Not Used".
9	28	9	M	Missing ledger or query at row %1, column %2 of layout.
10	28	10	M	Missing percent sign on variable in template %1.
11	28	11	M	Missing TimeSpan specification detected at row %1, column %2 of layout.
12	28	12	M	Descriptive field name missing or invalid at row %1, column %2 of layout.
13	28	13	M	- Report Book %1' for Operator ID %2' in Database %3'

Security When Using BIP REST Drilling URLs

The BIP REST Web Service is associated with the *PTPT1000 – PeopleSoft User* permission list and can be accessed by any PeopleSoft user to run a BI Publisher report. However, the returned results depend on the Query Access List permissions and row-level security that are specific to the user making the request. That is, PeopleSoft Query security is still enforced for query-based BI Publisher reports run using the BIP REST Web Service.

In addition, BI Publisher REST URLs require PeopleSoft User Authentication if a request is being made outside an existing PIA session; it requires basic authentication with SSL.

Page Used to Define REST Drilling URLs

Report developers use the Define a REST Service Drilling URL page in Query Manager to define the REST drilling URLs. They can locate and select any PeopleSoft REST Service Operation that is defined using the HTTP Get method and enter parameters for the REST drilling URL using either static text or by mapping to query field values. They can also map the REST drilling URLs to existing query columns or use them as standalone fields in the results, which is similar to other drilling URL types.

Navigation:

1. Select **Reporting Tools > Query > Query Manager**.
2. Open an existing query or create a new one.
3. Select the Expressions tab and click the **Add Expression** button.
4. Select the *Drilling URL* option from the **Expression Type** list and click the **REST URL** link.

This example illustrates the fields and controls on the Define a REST Service Drilling URL page. Definitions for the fields and controls appear following the example.

Define a REST Service Drilling URL

Service Operation  Use Secure REST Target: ☒

REST URI Templates	
Select	URI Template
☐	{OwnerType}/{QueryName}?isconnectedquery={IsConnectedQuery}
☒	{QueryName}?isconnectedquery={IsConnectedQuery}

URI Primitives		
Name	Value	Query Field
QueryName	%Menu Name%	
IsConnectedQuery		

▼ Map URL to Query Columns

Selection Flag	Unique Field Name
☒	Menu Name

REST URL

`https://slc05aql.us.oracle.com:443/PSIGW/RESTListeningConnector/QE_LOCAL/QueryFields.v1/{QueryName}?isconnectedquery={IsConnectedQuery}`

Field or Control	Description
Service Operation	Click the search icon to search and select a PeopleSoft-defined REST service operation. Note: Only REST service operations using a HTTP Get method are available for selection. Other sections and fields in this page appear after you select an existing service operation in the Service Operation field using the search icon or after you enter a valid service operation and tab out of the Service Operation field.
Use Secure REST Target	Select this check box to use the secure REST Target location (HTTPS) in the drilling URL. Note: Your selection of this option reflects in the REST URL field, which appears at the bottom of the page. If the selected service operation requires SSL as part of its Required Verification type, then this check box is selected by default and unavailable for modification.
REST URI Templates	Use this section to select a URI template from the list of available templates.

Field or Control	Description
URI Primitives and Collections	Use these sections to qualify the selected template with either static text values or mapped query field values, which will be used to qualify the REST URLs at query runtime.
Map URL to Query Columns	Use this section to map the REST URLs to existing columns and create drilldown links for those column values in the query results.
REST URL	This field displays a preview of the REST URL qualified with values you enter into the URI Primitives section or the URI Collections section. • If all the values specified are static values, then this field displays a fully qualified REST URL that you may copy and paste into a separate browser window to test. • If there are values that are mapped to Query Field values (for example, <i>%Menu Name%</i>), then the REST URL is not fully qualified as it can only be qualified with the corresponding Query Field value generated at runtime.

Steps Used to Define REST Drilling URL

Note: This section discusses the steps used to define a REST Drilling URL to a PeopleSoft-defined *REST Web Service Operation*. However, when defining a drilling URL specifically with the BIP Web Service (BIP_RUNREPORT_REST_GET), certain optimizations are applied to the page in this scenario, and these optimizations are discussed in the [Defining a REST Drilling URLs Using the BIP REST Service](#) section.

To define a REST drilling URL to a PeopleSoft-defined *REST Web Service Operation*:

1. Select **Reporting Tools > Query > Query Manager**.
2. Open an existing query or create a new one.
3. Select the Expressions tab and click the **Add Expression** button.
4. Select the *Drilling URL* option from the **Expression Type** list and click the **REST URL** link.

The Define a REST Service Drilling URL page appears.

5. In the **Service Operation** field, select a REST service operation; for example, select *QAS_LISTQUERYFIELDS_REST_GET*.

This example illustrates the Define a REST Service Drilling URL page displaying the *QAS_LISTQUERYFIELDS_REST_GET* value in the **Service Operation** field.

Define a REST Service Drilling URL

Service Operation  Use Secure REST Target: ☒

REST URI Templates Find | View All |  First 1-2 of 2 Last

Select	URI Template
☐	{OwnerType}/{QueryName}?isconnectedquery={IsConnectedQuery}
☐	{QueryName}?isconnectedquery={IsConnectedQuery}

▶ Map URL to Query Columns

REST URL

https://slc05aql.us.oracle.com:443/PSIGW/RESTListeningConnector/QE_LOCAL/QueryFields.v1/

6. Select a URI template in the REST URI Templates section.

The URI Primitives section appears.

7. Use the URI Primitives section to qualify elements in the selected template by either entering static values or mapping to runtime query field values.

This example illustrates the Define a REST Service Drilling URL page displaying the *QAS_LISTQUERYFIELDS_REST_GET* value in the **Service Operation** field. The URI Primitives section includes the static values. The **REST URL** field displays the qualified REST URL using the values specified in the URI Primitives section.

Define a REST Service Drilling URL

Service Operation  Use Secure REST Target: ☒

REST URI Templates Find | View All |  First 1-2 of 2 Last

Select	URI Template
☐	{OwnerType}/{QueryName}?isconnectedquery={IsConnectedQuery}
☒	{QueryName}?isconnectedquery={IsConnectedQuery}

URI Primitives Find |  First 1-2 of 2 Last

Name	Value	Query Field
QueryName	XRFWIN	
IsConnectedQuery	N	

▶ Map URL to Query Columns

REST URL

https://slc05aql.us.oracle.com:443/PSIGW/RESTListeningConnector/QE_LOCAL/QueryFields.v1/XRFWIN?isconnectedquery=N

8. In the URI Primitives section, click the **Lookup** icon in the **Query Field** column for element QueryName to map to a query field value.

The Select Mapping Query Fields page appears.

This example illustrates the Select Mapping Query Fields page.

Select Mapping Query Fields

Record.FieldName
A.EMPLID
A.EFFDT
A.QE_EMPLOYEE_NAME
A.QE_FIRST_NAME
A.QE_LAST_NAME

9. Select a query field from the **Record.FieldName** list.

The Define a REST Service Drilling URL page reappears displaying the mapped query field name in the **Value** column for the **QueryName** element.

This example illustrates the Define a REST Service Drilling URL page. In the URI Primitives section, the **Value** for the element **QueryName** displays `%A.EMPLID%` after you select the **A.EMPLID** field from the Select Mapping Query Fields page.

Define a REST Service Drilling URL

Service Operation: Use Secure REST Target: ☒

REST URI Templates		
Select	URI Template	
☐	{OwnerType}/{QueryName}?isconnectedquery={IsConnectedQuery}	
☒	{QueryName}?isconnectedquery={IsConnectedQuery}	

URI Primitives		
Name	Value	Query Field
QueryName	%A.EMPLID%	A.EMPLID
IsConnectedQuery	N	

▶ Map URL to Query Columns

REST URL

`https://slc05aql.us.oracle.com:443/PSIGW/RESListingConnector/QE_LOCAL/QueryFields.v1/%A.EMPLID%?isconnectedquery=N`

10. Click the **OK** button.

The Edit Expression Properties page reappears with the REST drilling URL expression in the **Expression Text** field.

This example illustrates the Edit Expression Properties page displaying the REST drilling URL expression in the **Expression Text** field.

Edit Expression Properties

***Expression Type**

Drilling URL

Expression Text

```

/rest_s/QAS_LISTQUERYFIELDS_REST_GET
/[%A.EMPLID%?isconnectedquery=N]

```

[Query URL](#)
[Component URL](#)

[External URL](#)
[Attachment URL](#)

[Free Form URL](#)
[Image URL](#)

[REST URL](#)

11. Click the **OK** button to return to the Expressions page.
12. Click the **Use as Field** link to use the REST drilling URL as a separate field in the query results.
13. Save the query and then select the Run tab.

This example illustrates the Run page displaying the REST drilling URLs in the **Drilling URL** column.

Records

Query

Expressions

Prompts

Fields

Criteria

Having

Dependency

Transformations

View SQL

Run

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

First

1-100 of 386

Last

	ID	Eff Date	Name	First	Last	SSN	JobCode	Dept	Drilling URL
1	7705	06/15/1996	Holt,Susan	SUSAN	HOLT	342564859	G061	10200	https://slc05aql.us.oracle.com:443/PSIGW/RESTListeningConnector/QE_LOCAL/QueryFields.v1/7705?isconnectedquery=N
2	8001	09/01/1996	Schumacher,Simon	ASD	ASD	549693847	1001	10100	https://slc05aql.us.oracle.com:443/PSIGW/RESTListeningConnector/QE_LOCAL/QueryFields.v1/8001?isconnectedquery=N
3	8001	05/05/1997	Schumacher,Simon	ASD	ASD	549693847	6001	10200	https://slc05aql.us.oracle.com:443/PSIGW/RESTListeningConnector/QE_LOCAL/QueryFields.v1/8001?isconnectedquery=N
4	8052	05/05/1997	Avery,Joan	JOAN	AVERY	111111111	6001	10200	https://slc05aql.us.oracle.com:443/PSIGW/RESTListeningConnector/QE_LOCAL/QueryFields.v1/8052?isconnectedquery=N
5	8101	06/27/1991	Penrose,Steven	STEVEN	PENROSE	302467012	1211	10500	https://slc05aql.us.oracle.com:443/PSIGW/RESTListeningConnector/QE_LOCAL/QueryFields.v1/8101?isconnectedquery=N

URI Collection Elements

Some URI templates may contain collection elements, which correspond with parameters on the URL that accept multiple comma-separated values. In these cases, you may add item values for the collection element using the **Insert Item for Collection** link at the top of the URI Collections section.

This is an example of using the URI Collections section to insert multiple values for a URI collections element while defining a REST drilling URL using the *QAS_EXECUTEQRY_REST_GET* service operation.

Define a REST Service Drilling URL

Service Operation
QAS_EXECUTEQRY_REST_GET
Use Secure REST Target:
☒

REST URI Templates
Find | View All |
First 1-5 of 12 Last

Select	URI Template
☐	{OwnerType}/{QueryName}/{OutResultType}/{OutResultFormat}?isconnectedquery={isConnectedQuery}&maxrows={MaxRow}&prompt_psqueryname={Prompt_PSQueryName*}&prompt_uniquepromptname={Prompt_UniquePromptName*}&prompt_fieldvalue={Prompt_FieldValue*}&filterfields={FilterFields*}
☐	{OwnerType}/{QueryName}/{OutResultType}/{OutResultFormat}?isconnectedquery={isConnectedQuery}&maxrows={MaxRow}&prompt_psqueryname={Prompt_PSQueryName*}&prompt_uniquepromptname={Prompt_UniquePromptName*}&prompt_fieldvalue={Prompt_FieldValue*}&filterfields={FilterFields*}&json_resp={json_response}
☒	{OwnerType}/{QueryName}/{OutResultType}/{OutResultFormat}?isconnectedquery={isConnectedQuery}&maxrows={MaxRow}&prompt_uniquepromptname={Prompt_UniquePromptName*}&prompt_fieldvalue={Prompt_FieldValue*}&filterfields={FilterFields*}
☐	{OwnerType}/{QueryName}/{OutResultType}/{OutResultFormat}?isconnectedquery={isConnectedQuery}&maxrows={MaxRow}&prompt_uniquepromptname={Prompt_UniquePromptName*}&prompt_fieldvalue={Prompt_FieldValue*}&filterfields={FilterFields*}&json_resp={json_response}
☐	{OwnerType}/{QueryName}/{OutResultType}/{OutResultFormat}?isconnectedquery={isConnectedQuery}&maxrows={MaxRow}&prompt_psqueryname={Prompt_PSQueryName*}&prompt_uniquepromptname={Prompt_UniquePromptName*}&prompt_fieldvalue={Prompt_FieldValue*}

URI Primitives
Find |
First 1-6 of 6 Last

Name	Value	Query Field
OwnerType	public	
QueryName	MESSAGES_FOR_MSGSET	
OutResultType	XMLP	
OutResultFormat	FILE	
isConnectedQuery	N	
MaxRow	1000	

Insert Item for Collection:

FilterFields
Prompt_FieldValue
Prompt_UniquePromptName

URI Collections

Name
Value

Prompt_UniquePromptName	
Prompt_FieldValue	
FilterFields	

Map URL to Query Columns

REST URL

https://slc05aql.us.oracle.com:443/PSIGW/RESListingConnector/QE_LOCAL/ExecuteQuery.v1/public/MESSAGES_FOR_MSGSET/XMLP/FILE?isconnectedquery=N&maxrows=1000&prompt_uniquepromptname=&prompt_fieldvalue=&filterfields=

This example illustrates the Define a REST Service Drilling URL page - URL Collections section. Use the drop-down list next to the **Insert Item for Collection** link to select a collection element value to add to the URI collections. For example, you can select the *FilterFields* option from the drop-down list and click the **Insert Item for Collection** link twice to insert two rows under the FilterFields collection element in the URI Collections section, and then you use the inserted rows to define either static values or map to query fields.

MaxRow: 1000

Insert Item for Collection: FilterFields

Name	Value	Query Field
Prompt_UniquePromptName		
Prompt_FieldValue		
FilterFields		
	A.MESSAGE_SET_NBR	
	A.MESSAGE_NBR	

Map URL to Query Columns

REST URL

https://slc05aql.us.oracle.com:443/PSIGW/REStListeningConnector/QE_LOCAL/ExecuteQuery.v1/public/XRFWIN/XMLP/FILE?isconnectedquery=N&maxrows=1000&prompt_uniquepromptname=&prompt_fieldvalue=&filterfields=A.MESSAGE_SET_NBR,A.MESSAGE_NBR

Defining a REST Drilling URLs Using the BIP REST Service

When you define a REST Drilling URL using the BIP Rest Service Operation *BIP_RUNREPORT_REST_GET*, certain optimizations are applied to the page in order to better facilitate the process. Specifically, the following features are available:

- Lookup functionality for URI template elements.

In the URI Primitives section, a Lookup icon is available for each element in the selected URI template. You can use the lookup icons to search and select the applicable values for these elements (such as the **ReportID**, **TemplateID**, **OutputFormat**, and **LangCode**) rather than having to enter the values manually.

Similarly, the Lookup icons are also available in the URI Collections section. If the selected report definition is based on a query containing prompts, these prompt name and value pairs are specified using the **Query_PromptColl Collection** element. The Lookup icons can be used to select from available values for the prompt, provided a prompt table has been defined for the prompt in the query definition.

- Default values.

After selecting a value for the ReportID (BIP Report Definition ID), all other optional element values (such as the **TemplateID**, etc.) are automatically pre-populated according to the default values defined at the report definition level.

The following steps are the sample process of how to create a REST Drilling URL using the BIP REST Service:

1. Select **Reporting Tools > Query > Query Manager**.
2. Open an existing query or create a new one.
3. Select the Expressions tab and click the **Add Expression** button.
4. Select the *Drilling URL* option from the **Expression Type** list and click the **REST URL** link.

The Define a REST Service Drilling URL page appears.

5. In the **Service Operation** field, select service operation *BIP_RUNREPORT_REST_GET* (BIP Rest Web Service).
6. Select a URI template in the REST URI Templates section.

This example illustrates the Define a REST Service Drilling URL page. The **Service Operation** field display the service operation *BIP_RUNREPORT_REST_GET* and a URI template is selected in the REST URI Templates section.

Define a REST Service Drilling URL

Service Operation  Use Secure REST Target: ☒

REST URI Templates Find | View All |   First 6-10 of 16 Last

Select	URI Template
☐	{ReportID}?format={OutputFormat}&langcd={LangCode}
☒	{ReportID}?format={OutputFormat}&prompts={Query_PromptColl*}
☐	{ReportID}?langcd={LangCode}&prompts={Query_PromptColl*}
☐	{ReportID}/{TemplateID}
☐	{ReportID}/{TemplateID}?format={OutputFormat}

URI Primitives Find |   First 1-2 of 2 Last

Name	Value	Query Field	Lookup
ReportID			
OutputFormat			

URI Collections Find |   First 1 of 1 Last

Name	Value
Query_PromptColl	

► Map URL to Query Columns

REST URL

`https://slc05aql.us.oracle.com:443/PSIGW/RESTListeningConnector/QE_LOCAL/BIPRunReport.v1/{ReportID}?format={OutputFormat}`

7. In the URI Primitives section, click the **Lookup** icon on the **ReportID** row.

The Select Value for ReportID page appears.

This example illustrates the Select Value for ReportID page. All report definitions that you have permissions to access appear in the list for your selection.

Select Value for ReportID

Select a Report Definition

Search by ReportID

ReportID	Description
COUNT_TEST	MESSAGE Severity MESSET 1-20
QEQ OMX4200	Product List
QESMOKEXMLP	Smoke XMLP
QE_1KEY_BLNK	Data Generation w blank values
QE_AP_NVS	For Nested Group Sorting
QE_COUNT	Count Agg Func Query and Chart
QE_DATE_TIME	For Testing Date Time stamp
QE_DEPT_DET	QE_DEPT_DET
QE_DRURL_QRY	For DRILL URL with Query Test
QE_EMPTY_FONT	For font used for empty spaces
QE_EMP_LIST	QE_EMP_LIST
QE_FRA_TRANS	Translation Testing for French
QE_PDF_7PROF	Run Report w 7 Prof Template

- Select a report ID from the list of available report IDs and then the Define a REST Service Drilling URL page reappears.

In this example, select the **QE_FRA_TRANS** report.

This example illustrates the Define a REST Service Drilling URL page displaying the selected report ID in the **ReportID** row. In addition, other URI elements are populated with the default values for this report definition.

Define a REST Service Drilling URL

Service Operation
Use Secure REST Target: ☒

REST URI Templates
Find | View All | First 6-10 of 16 Last

Select	URI Template
☐	{ReportID}?format={OutputFormat}&langcd={LangCode}
☒	{ReportID}?format={OutputFormat}&prompts={Query_PromptColl*}
☐	{ReportID}?langcd={LangCode}&prompts={Query_PromptColl*}
☐	{ReportID}/{TemplateID}
☐	{ReportID}/{TemplateID}?format={OutputFormat}

URI Primitives
Find | First 1-2 of 2 Last

Name	Value	Query Field	Lookup
ReportID	QE_FRA_TRANS		
OutputFormat	HTM		

URI Collections
Find | First 1-2 of 2 Last

Name	Value	Query Field	Lookup
Query_PromptColl	MESSAGE_SET_NBR		

Map URL to Query Columns

REST URL

Note: If you manually enter a valid report definition ID into the **Value** field for **ReportID** (rather than using the **Lookup** icons) and then tab out of the field, the other URI elements are automatically populated with the default values as well.

- Optionally, use the **Lookup** icons for the other URI elements to select any values other than the default values.

For instance, when you click the **Lookup** icon for OutputFormat, you are presented with all available output formats as defined in the report definition.

This example illustrates the Select Value for OutputFormat page when you click the **Lookup** icon for OutputFormat.

Select Value for OutputFormat

Select an Output Format

Search by OutputFormat

OutputFormat	Description
HTM	HTML Documents (*.htm)
PDF	Acrobat (*.pdf)
RTF	Rich Text File (*.rtf)
XLS	Microsoft Excel Files (*.xls)

Find | View All | First 1-4 of 4 Last

10. Use the Define a REST Service Drilling URL page - URI Collections section to populate the values for the Query_PromptColl Collection element in the URI Template, which requires name-value pairs for all query prompts that are defined for the underlying query used by this report definition.

In this example, there is a single prompt *MESSAGE_SET_NBR* defined for the query. The prompt name *MESSAGE_SET_NBR* is displayed in a column preceding the **Value** column, which is used for specifying the value for this query prompt.

11. Click the **Lookup** icon on the prompt *MESSAGE_SET_NBR* to access the Select Value for *MESSAGE_SET_NBR* page where you can search and select a value for the prompt, provided a prompt table has in fact been defined for this prompt field in the query definition.

This example illustrates the Select Value for MESSAGE_SET_NBR page.

Select Value for MESSAGE_SET_NBR	
Query Prompt Lookup	
Find View 100   First 1-30 of 270 Last	
MESSAGE SET NBR	Description
1	PeopleTools Message Bar Items
2	PeopleCode
3	General Tools Messages
4	Help Processor
5	Help Text Manager
6	Import Definition Manager
7	Open Query API
8	PeopleCode Editor
9	Menu Definition Manager
10	Change Control
11	Object Group Manager
12	Definition Security Manager
13	Market Rate Processing
14	Panel Definition Manager
15	Application Processor
16	Printer Manager
17	Validation Wizard
18	Record Access Manager
19	Java Client

12. Click the number link for any of the listed values to select that message set number.

The Define a REST Service Drilling URL page reappears.

This example illustrates the Define a REST Service Drilling URL page listing message set number 27.

Define a REST Service Drilling URL

Service Operation
BIP_RUNREPORT_REST_GET
Use Secure REST Target:
☒

REST URI Templates
Find | View All |
First
6-10 of 16
Last

Select	URI Template
☐	{ReportID}?format={OutputFormat}&langcd={LangCode}
☒	{ReportID}?format={OutputFormat}&prompts={Query_PromptColl*}
☐	{ReportID}?langcd={LangCode}&prompts={Query_PromptColl*}
☐	{ReportID}/{TemplateID}
☐	{ReportID}/{TemplateID}?format={OutputFormat}

URI Primitives
Find |
First
1-2 of 2
Last

Name	Value	Query Field	Lookup
ReportID	QE_FRA_TRANS	☒	☒
OutputFormat	HTM	☒	☒

URI Collections
Find |
First
1-2 of 2
Last

Name	Value	Query Field	Lookup
Query_PromptColl			
MESSAGE_SET_NBR	27	☒	☒

Map URL to Query Columns

REST URL
https://slc05aql.us.oracle.com:443/PSIGW/RESTListeningConnector/QE_LOCAL/BIPRunReport.v1/QE_FRA_TRANS?format=HTM&prompts=MESSAGE_SET_NBR,27

Note: When you define a REST Drilling URL using the BIP Rest Service Operation, you cannot manually add values into a collection element. The URI Collections section in this case is used solely for the population of the Query Prompt values; therefore, the **Insert Item for Collection** link and the drop-down list are not available as can be seen when you define the drilling URL using other service operations.

- Expand the Map URL to Query Columns section and then select the fields to map the REST URL to query columns.

This example illustrates the Map URL to Query Columns section. The REST drilling URL is mapped to the **A.DEPTID** column.

▼ Map URL to Query Columns	
Selection Flag	Unique Field Name
☐	A.EMPLID
☐	A.EFFDT
☐	A.QE_EMPLOYEE_NAME
☐	A.QE_FIRST_NAME
☐	A.QE_LAST_NAME
☐	A.QE_SOC_SEC_NBR
☐	A.QE_JOBCODE
☒	A.DEPTID

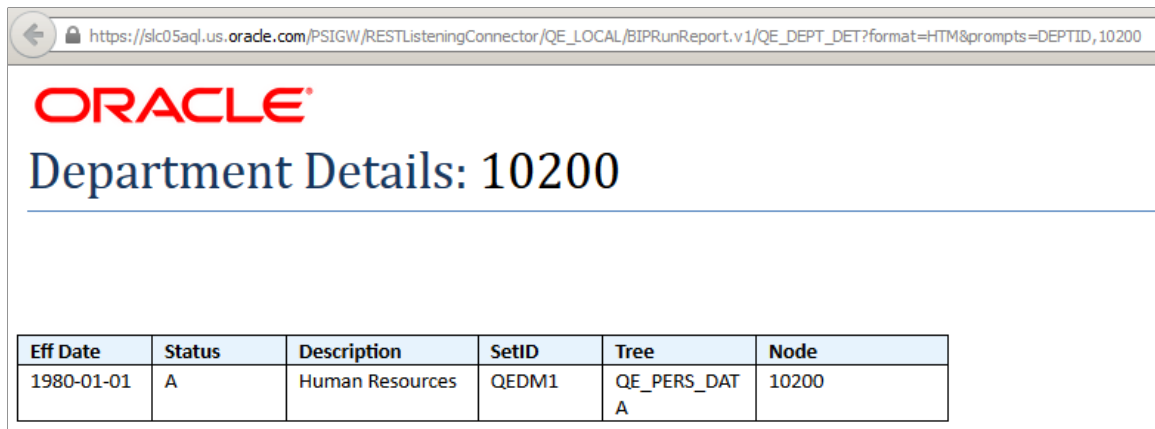
14. Click the **OK** button to return to the Expressions page.
15. Optionally, click the **Use as Field** link to use the REST drilling URL as a separate field in the query results.
16. Save the query and then access the Run page.

This example illustrates the Run page displaying the REST drilling URLs. The Dept (DEPTID) column is mapped to the REST drilling URL and the Drilling URL column displays the REST drilling URLs separately.

Records Query Expressions Prompts Fields Criteria Having Dependency Transformations View SQL Run									
View All Rerun Query Download to Excel Download to XML									
First 1-100 of 386 Last									
	ID	Eff Date	Name	First	Last	SSN	JobCode	Dept	Drilling URL
1	7705	06/15/1996	Holt,Susan	SUSAN	HOLT	342564859	G061	10200	https://slc05aql.us.oracle.com:443/PSIGW/RESTListeningConnector/QE_LOCAL/QueryFields.v1/7705?isconnectedquery=N
2	8001	09/01/1996	Schumacher,Simon	ASD	ASD	549693847	1001	10100	https://slc05aql.us.oracle.com:443/PSIGW/RESTListeningConnector/QE_LOCAL/QueryFields.v1/8001?isconnectedquery=N
3	8001	05/05/1997	Schumacher,Simon	ASD	ASD	549693847	6001	10200	https://slc05aql.us.oracle.com:443/PSIGW/RESTListeningConnector/QE_LOCAL/QueryFields.v1/8001?isconnectedquery=N
4	8052	05/05/1997	Avery,Joan	JOAN	AVERY	111111111	6001	10200	https://slc05aql.us.oracle.com:443/PSIGW/RESTListeningConnector/QE_LOCAL/QueryFields.v1/8052?isconnectedquery=N
5	8101	06/27/1991	Penrose,Steven	STEVEN	PENROSE	302467012	1211	10500	https://slc05aql.us.oracle.com:443/PSIGW/RESTListeningConnector/QE_LOCAL/QueryFields.v1/8101?isconnectedquery=N

17. Click a **REST URL** link to display the report output.

This is an example report output that appears in the browser after you click the **10200** link in the previous example.



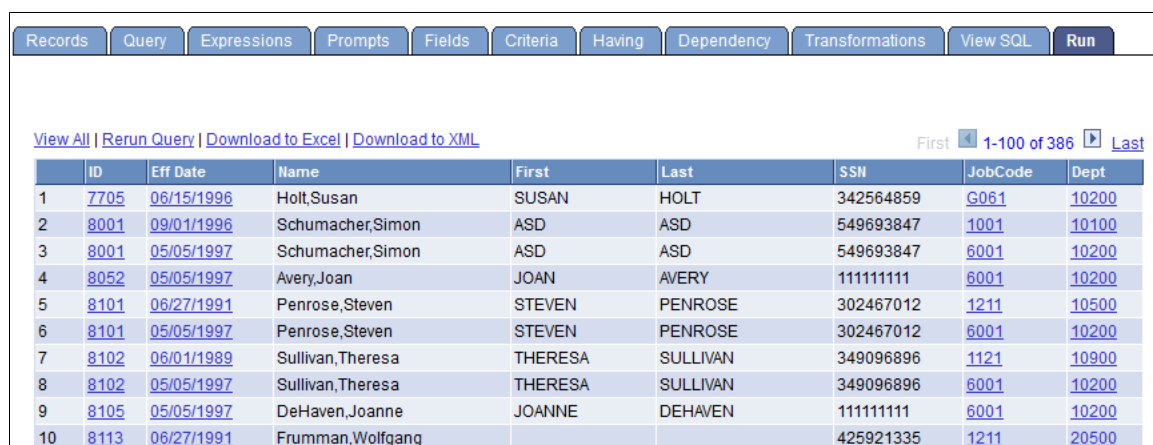
Eff Date	Status	Description	SetID	Tree	Node
1980-01-01	A	Human Resources	QEDM1	QE_PERS_DAT A	10200

Viewing Query Results With Drilling URLs

When you access the Run page of a query that has a Drilling URL defined, its query results are shown as links. Clicking these result links either:

- Runs the destination query with prompt key values if the source query has prompt criteria defined and prompt keys are mapped to source query result columns.
- Launches the component with the search key values if the source query has search keys defined and search keys are mapped to source query result columns.
- Redirects the external URL.

This is an example of the Run page with query results as links. When you click the **Download to Excel** link to download query results to a Microsoft Excel spreadsheet, an Excel spreadsheet is launched with links to respective cells. When you click the **Excel** link from Query Manager or the Query Viewer search results page, you get similar query results.



ID	Eff Date	Name	First	Last	SSN	JobCode	Dept
7705	06/15/1996	Holt,Susan	SUSAN	HOLT	342564859	G061	10200
8001	09/01/1996	Schumacher,Simon	ASD	ASD	549693847	1001	10100
8001	05/05/1997	Schumacher,Simon	ASD	ASD	549693847	6001	10200
8052	05/05/1997	Avery,Joan	JOAN	AVERY	111111111	6001	10200
8101	06/27/1991	Penrose,Steven	STEVEN	PENROSE	302467012	1211	10500
8101	05/05/1997	Penrose,Steven	STEVEN	PENROSE	302467012	6001	10200
8102	06/01/1989	Sullivan,Theresa	THERESA	SULLIVAN	349096896	1121	10900
8102	05/05/1997	Sullivan,Theresa	THERESA	SULLIVAN	349096896	6001	10200
8105	05/05/1997	DeHaven,Joanne	JOANNE	DEHAVEN	111111111	6001	10200
8113	06/27/1991	Frumman,Wolfgang			425921335	1211	20500

This is an example of the Run page with query results as image links.

Image URL
http://slc00fdm:8620/psc/ps/EMPLOYEE/QE_LOCAL/q/?ICAction=ICQryImageUrl=PUBLIC.QRY_QE_ORG_ABNPIC_IMG&BIND1=DEFAULT4&BIND2=DEF1&BIND3=DEF0
http://slc00fdm:8620/psc/ps/EMPLOYEE/QE_LOCAL/q/?ICAction=ICQryImageUrl=PUBLIC.QRY_QE_ORG_ABNPIC_IMG&BIND1=DEFAULT4&BIND2=DEF31&BIND3=DEF22
http://slc00fdm:8620/psc/ps/EMPLOYEE/QE_LOCAL/q/?ICAction=ICQryImageUrl=PUBLIC.QRY_QE_ORG_ABNPIC_IMG&BIND1=DEFAULT3&BIND2=DEF81F&BIND3=DEF22
http://slc00fdm:8620/psc/ps/EMPLOYEE/QE_LOCAL/q/?ICAction=ICQryImageUrl=PUBLIC.QRY_QE_ORG_ABNPIC_IMG&BIND1=DEFAULT7&BIND2=DEF81E&BIND3=DEF22
http://slc00fdm:8620/psc/ps/EMPLOYEE/QE_LOCAL/q/?ICAction=ICQryImageUrl=PUBLIC.QRY_QE_ORG_ABNPIC_IMG&BIND1=DEFAULT8&BIND2=DEF22&BIND3=P1
http://slc00fdm:8620/psc/ps/EMPLOYEE/QE_LOCAL/q/?ICAction=ICQryImageUrl=PUBLIC.QRY_QE_ORG_ABNPIC_IMG&BIND1=DEFAULT3&BIND2=DEF31&BIND3=DEF22
http://slc00fdm:8620/psc/ps/EMPLOYEE/QE_LOCAL/q/?ICAction=ICQryImageUrl=PUBLIC.QRY_QE_ORG_ABNPIC_IMG&BIND1=DEFAULT4&BIND2=DEF23&BIND3=DEF1
http://slc00fdm:8620/psc/ps/EMPLOYEE/QE_LOCAL/q/?ICAction=ICQryImageUrl=PUBLIC.QRY_QE_ORG_ABNPIC_IMG&BIND1=DEFAULT7&BIND2=DEF81A&BIND3=DEF22
http://slc00fdm:8620/psc/ps/EMPLOYEE/QE_LOCAL/q/?ICAction=ICQryImageUrl=PUBLIC.QRY_QE_ORG_ABNPIC_IMG&BIND1=DEFAULT7&BIND2=DEF0&BIND3=DEFTOP

This is an example of query results in Microsoft Excel when you click the **Excel** link in Query Manager or Query Viewer. Note that the URL appears when you hover the mouse over a cell.

The screenshot shows a Microsoft Excel window titled "QE_EMPLOYEE_9315.xls [Compatibility Mode] - Microsoft Excel". The ribbon includes Home, Insert, Page Layout, Formulas, Data, Review, and View. The formula bar shows "A1" and "QE_EMPLOYEE". The table has columns: ID, Eff Date, Name, First, Last, SSN, JobCode, and Dept. A tooltip is visible over cell A10, displaying the URL: http://myserver.example.com:8920/psc/QEDMO/EMPLOYEE/QE_LOCAL/q/?ICAction=ICQryNameURL=PUBLIC.BI_PVG_BILL_VW&A.EMPLID=8101. The tooltip also contains the text: "Click once to follow. Click and hold to select this cell."

ID	Eff Date	Name	First	Last	SSN	JobCode	Dept
7705	6/15/1996	Holt,Susan	SUSAN	HOLT	342564859	G061	10200
8001	9/1/1996	Schumacher,Simon	ASD	ASD	549693847	1001	10100
8001	5/5/1997	Schumacher,Simon	ASD	ASD	549693847	6001	10200
8052	5/5/1997	Avery,Joan	JOAN	AVERY	111111111	6001	10200
8101	6/27/1991	Penrose,Steven	STEVEN	PENROSE	302467012	1211	10500
8101	5/5/1997	Penrose,Steven	STEVEN	PENROSE	302467012	6001	10200
8102			ESA	SULLIVAN	349096896	1121	10900
8102			ESA	SULLIVAN	349096896	6001	10200
8105			NE	DEHAVEN	111111111	6001	10200
8113					425921335	1211	20500
8120	5/5/1997	Jones,Theresa	THERESA	JONES	111111111	6001	10200
8121	3/1/1996	Gregory,Jan	JAN	GREGORY	547234772	6001	10200
8121	5/5/1997	Gregory,Jan	JAN	GREGORY	547234772	6001	10200

You can also view the query results of a query that has drilling URL defined using the **HTML** links in Query Manager or Query Viewer.

This is an example of query results as links when you click the **HTML** links in Query Manager or Query Viewer.

QE_EMPLOYEE - QE Employee Info

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (149 kb)

View All First 1-100 of 386 [»](#) Last

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

In this query result page:

- You can click the **Excel Spreadsheet** link to download query results to Microsoft Excel.

Note: The **Excel Spreadsheet** link in this query result page has the same usage as the **Excel** link in Query Manager or the Query Viewer search result page.

- You can click the **CSV Text File** link to download query results into a CSV format file.

Note: Because CSV file is opened using a text editor such as Notepad and links do not apply to text editors, unlike HTML and Excel, no links exist in the CSV format file. However, if you select drilling URL as query selected field, then the drilling URL appears in a fully expanded version.

This is an example of CSV file content:

```
"QEDM1","10900","10900","http://myserver.example.com:8920/psp/ps_2/EMPLOYEE/
/QE_LOCAL/c/QE_SAMPLE_APPS.QE_DEPT_TBL.GBL?Action=U&DEPTID=10900&SETID=QEDM1"
```

Scheduling Queries With Drilling URLs

The Schedule Query page has five different output types: *HTM*, *PDF*, *TXT*, *XLS*, and *XML*. Result files from a successful schedule query run contain links for respective columns using *HTM*, *PDF*, and *XLS* formats.

This is an example of query results in PDF format. Note that the URL appears when you hover the mouse over a cell.

drillingURLs using MSN w/xform

	SetID	Dept	Eff Date	Descr	Drilling URL
1	QEDM1	00001	06/15/1996	Corporate Headquarters	http://dep1113a.appsdev.fusionappsdpdx1.oraclevcn.com:8000/psp/t63103rzz/EMPLOYEE/C
2	QEDM1	10000	01/01/1985	Administration Division	http://dep1113a.appsdev.fusionappsdpdx1.oraclevcn.com:8000/psp/t63103rzz/EMPLOYEE/C
3	QEDM1	10100	01/01/1960	Office of the President	http://dep1113a.appsdev.fusionappsdpdx1.oraclevcn.com:8000/psp/t63103rzz/EMPLOYEE/C
4	QEDM1	10200	01/01/1980	Human Resources	http://dep1113a.appsdev.fusionappsdpdx1.oraclevcn.com:8000/psp/t63103rzz/EMPLOYEE/C
5	QEDM1	10300	01/01/1960	Controllers	http://dep1113a.appsdev.fusionappsdpdx1.oraclevcn.com:8000/psp/t63103rzz/EMPLOYEE/C
6	QEDM1	10400	01/01/1960	Retail Services	http://dep1113a.appsdev.fusionappsdpdx1.oraclevcn.com:8000/psp/t63103rzz/EMPLOYEE/C
7	QEDM1	10500	01/01/1960	Business Services	http://dep1113a.appsdev.fusionappsdpdx1.oraclevcn.com:8000/psp/t63103rzz/EMPLOYEE/C
8	QEDM1	10600	01/01/1960	Branch Office Administration	http://dep1113a.appsdev.fusionappsdpdx1.oraclevcn.com:8000/psp/t63103rzz/EMPLOYEE/C
9	QEDM1	10700	01/01/1960	Walnut Creek Office	http://dep1113a.appsdev.fusionappsdpdx1.oraclevcn.com:8000/psp/t63103rzz/EMPLOYEE/C
10	QEDM1	10800	01/01/1980	Lafayette Office	http://dep1113a.appsdev.fusionappsdpdx1.oraclevcn.com:8000/psp/t63103rzz/EMPLOYEE/C

http://dep1113a.appsdev.fusionappsdpdx1.oraclevcn.com:8000/psp/t63103rzz/EMPLOYEE/C
[EMPLOYEE/LOCAL_APPS/QE_DEPT_TBL.GBL?Action=U&DEPTID=10900&SETID=QEDM1]

If drilling URL is defined in the query, then no links exist in the result file for TXT and XML formats. However, if you select drilling URLs as a query selected field, drilling URLs are shown in a fully expanded version.

This is an example of TXT file content:

```
"QEDM1","10900","10900","http://myserver.example.com:8920/ps/ps_2/EMPLOYEE  
/QE_LOCAL/c/QE_SAMPLE_APPS.QE_DEPT_TBL.GBL?Action=U&DEPTID=10900&SETID=QEDM1"
```

Note: Theoretically, one query can have multiple drilling URLs defined; however, the number of URLs for each query should be limited to enhance performance. For queries that return a large number of results, having multiple URLs defined would slow query execution time.

Modifying, Scheduling, and Organizing Queries

Modifying Queries

Opening Existing Queries

Use Query Manager component to open and view queries.

This example illustrates the fields and controls on the Query Manager search results page.

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

*Folder View

*Action

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References
☐	BI_PVG_BILL_VW	Bill Hdr w INV bill status vw	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
☐	BI_PVG_IVC_VW	Bill Hdr w INV bill status vw	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
☐	CM_ATTRIBUTES	Attribute mappings	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
☐	CM_DIM_CTRL_TBL	Dimension Control Table	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
☐	CM_FACT_CTRL_TBL	Fact Control Table	Public		Edit	HTML	Excel	XML	Schedule	Lookup References
☐	CM_FACT_MAP_TBL	Fact Map Table	Public		Edit	HTML	Excel	XML	Schedule	Lookup References

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 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.

Related Links

“Understanding Meta-SQL” (PeopleCode Language Reference)

Renaming Queries

Use the Rename Queries page to rename existing queries.

This example illustrates the fields and controls on the Rename Queries page.

Query Name	Owner	New Name
CM_ATTRIBUTES		ATTR_MAPPINGS
CM_FACT_MAP_TBL		FACT_MAP_TBL
CM_HIER_MAP_TBL		HIER_MAP_TBL

To rename a query:

1. Select **PeopleTools > Utilities > Administration > Query Administration**.

2. On the Admin (Administration) page, select a predefined search or a manual search by clicking the respective **Search** button.
3. Select the queries from the Query List.
4. Click the **Rename** button.

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 the **OK** button 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.

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, select a predefined search or a manual search by clicking the respective **Search** button.
3. Click the **Delete** button.

The Query Delete Verification page appears.

4. Click the **Yes** button to confirm the deletion or click the **No** button 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.

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.

Note: When you save an existing query after editing it, Query Manager deletes the old version of it and then recreates the query. The query definition table entries and language table entries related to the query definition are deleted.

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. Access the tab that you want to modify the information—except the Run tab.
4. Enter the new information.
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 must be saved before downloading query results to Microsoft Excel. A message appears 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 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.

The following table lists the problems and their corresponding actions.

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

Problem	Action
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.

Related Links

“Setting Query Permissions” (Security Administration)

Scheduling Queries

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.

This example illustrates the fields and controls on the Schedule Query page.

The screenshot shows the 'Schedule Query' page. At the top, there's a title 'Schedule Query'. Below it, there's a 'Run Control ID' field with the value 'RunQry'. To the right of this field are two links: 'Report Manager' and 'Process Monitor', and a yellow 'Run' button. Below the 'Run Control ID' field, there's a 'Query Name' field with the value 'CM_ATTRIBUTES' and a yellow 'Search' button. Below the 'Query Name' field, there's a '*Description:' field with the value 'Attribute mappings'. Below the '*Description:' field, there's a link 'Update Parameters'. Below the 'Update Parameters' link, there's a table with two columns: 'Prompt Name' and 'Value'. The table has one row with the value 'ATTRIBUTE_NUM' and a text input field containing the value '112'.

To submit a process request:

1. Select **Reporting Tools > Query > Schedule Queries**.
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.

4. Optionally, select an option in the **Asian Font** field.

The **Asian Font** field is available if the output format is set to *PDF* with Asian fonts.

If the output format is set to PDF, you are able to run queries to PDF outputs with all Western European fonts, Korean font, Japanese font, Traditional Chinese font, and Simplified Chinese font. Alternatively, use BI Publisher to run queries to PDF outputs with Eastern European fonts, Thai fonts, Russian fonts, and so on; or change the output to another format.

See “Using Scheduled Queries” (Global Technology).

5. 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.

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

You are unable to open or schedule a query that has been disabled.

6. Click the **Save** button to save changes and remain on the Schedule Query page.
7. 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.

8. 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 BI Publisher is run through **Reporting Tools > Query > Schedule Queries** the BI Publisher-related prompts do not appear. The normal basic table-formatted query results will be generated.

See “Understanding Run Control IDs” (Process Scheduler), “Submitting Process Requests” (Process Scheduler), “Scheduling Process Requests” (Process Scheduler), “Using Process Status Notifications” (Process Scheduler), “Scheduling Reports in Query Report Scheduler” (BI Publisher for PeopleSoft).

Schedule Query with Tree Prompt

You can schedule queries that have tree prompts using the Schedule Query component or using the **Schedule** links in the Query Manager and Query Viewer. While scheduling these queries, you are prompted for selecting the tree for the specified field and its node list. After the successful selection of values for the tree prompts, other prompts are available for your input. These queries can either be saved and used in the future or can be scheduled and run immediately by clicking the **Run** button.

This example illustrates the fields and controls on the Schedule Query page with query that has In Tree prompts. Definitions for the fields and controls appear following the example.

Schedule Query

Run Control ID: TEST

Report Manager

Process Monitor

Query Name

QEQ_PII_XFORM

*Description

xform Multi Tree prompts

Asian Font

Update Tree Parameters

Tree Prompts

Field Name	Expression Text
A.QE_JOBCODE	SHARE,,QEQ_DEPT,1900-01-01,DEPARTMENTS

OK

Cancel

Apply

Field or Control	Description
Update Tree Parameters	The Update Tree Parameters link is available if you are running queries that have tree prompts. Click this link to access the Select a Tree page and the Select Tree Node page, where you can select a tree and its node list.
Tree Prompts	The Tree Prompts section displays the field names and expression texts, which will be used in forming the SQL before running the query.

Note: In Windows query application psqed.exe, you also can create tree prompts and use that prompts to enter input at runtime. Execution of the query is similar to PIA Query Manager, where you select the tree node to run the query.

Scheduling and Distributing Query and Connected Query Results with Transformation

In PSQuery, the available user-defined output formats are HTM, PDF, TXT, XFORM, XLS, XML, and XMLP. You select the XFORM format to trigger a transformation (XSLT). Note that you must provide the XSLT to define the desired transformation of the extracted data.

To generate the query results with transformation and distribute that resulting data, you schedule the query process to run using the Process Scheduler Request page and select *XFORM* as the output format.

The following example shows the fields and controls on the Process Scheduler Request page when you generate the query results with transformation.

The screenshot shows the 'Process Scheduler Request' dialog box. At the top, it displays 'User ID: QEDMO' and 'Run Control ID: 123'. Below this, there are fields for 'Server Name' (set to 'PSNT'), 'Run Date' (set to '04/04/2025'), 'Recurrence' (empty), and 'Run Time' (set to '4:12:31AM'). A 'Time Zone' field with a search icon is also present. A 'Reset to Current Date/Time' button is located next to the 'Run Time' field. The 'Process List' section contains a table with the following data:

Select	Description	Process Name	Process Type	Type	Format	Distribution	Transformation
☒	PSQUERY	PSQUERY	Application Engine	Web	XFORM	Distribution	

At the bottom of the dialog, there are 'OK' and 'Cancel' buttons.

To generate the query results with transformation and distribute that resulting data to an external IB node using the Integration Broker framework, you schedule the query process to run using the Process Scheduler Request page, set the output type to *IB Node*, and set the output format to *XFORM*. The page also includes the **Approval Required** option that enables you to review and approve the transformed output before distributing it.

The following example shows the fields and controls on the Process Scheduler Request page when you generate the query results with transformation and distribute that resulting data to an external IB node using the Integration Broker framework. Definitions for the fields and controls follow the example.

The screenshot shows the 'Process Scheduler Request' dialog box with the same top section as the previous image. The 'Process List' table is updated as follows:

Select	Description	Process Name	Process Type	Type	Format	Node	Approval Required	Transformation
☒	PSQUERY	PSQUERY	Application Engine	IB Node	XFORM	QE_ONDEMAND	☒	

The 'Approval Required' checkbox is now checked. The 'Node' field is set to 'QE_ONDEMAND'. The 'OK' and 'Cancel' buttons remain at the bottom.

Field or Control	Description
Type	The available options are: • <i>Email</i>: If the <i>Email</i> option is selected, the Format and Distribution drop-down lists appear. • <i>Feed</i>: If the <i>Feed</i> option is selected, the Format, Distribution, and Feed Title drop-down lists appear, and the only available format is <i>ATOM</i>. • <i>File</i>: If the <i>File</i> option is selected, the Format and Distribution drop-down lists appear. • <i>IB Node</i>: The <i>IB Node</i> option is used to generate the custom output. The selected Integration Broker node will define the destination of the output. If the <i>IB Node</i> option is selected, the Format list, Node list, Approval Required check box, and Transformation list appear, and the only available format is <i>XFORM</i>. • <i>Web</i>: If the <i>Web</i> option is selected, the Format and Distribution drop-down lists appear. • <i>Window</i>: If the <i>Window</i> option is selected, the Format and Distribution drop-down lists appear.
Format	The available options are HTM, PDF, TXT, XFORM, XLS, XML, and XMLP. Note: If the output type is set to <i>Feed</i>, the only available format is <i>ATOM</i> and the Transformation drop-down list is not available. ScheduledQuery-CSVUnicodeEncoding setting applies only when OutputUnicode property of query class is set to <i>True</i> and scheduled query is set to 'TXT' format. It is not a required setting. If it is not set, the CSV output encoding will be UCS2 with BOM. See "PSTools Section" (Process Scheduler) If the output type is set to <i>IB Node</i>: • The only available option in the Format column is <i>XFORM</i>, which enables you to generate a customized output format. • The Node, Approval Required, and Transformation drop-down lists appears.

Field or Control	Description
Node	This option is available when the Type column is set to <i>IB Node</i>. Select an IB node from the list of the external IB nodes, which were enabled to receive the transformation output with the routing added to receive the delivered Query Transform Server Operation. Note: To enable an IB Node to receive the query and connected query transformed outputs, you must add a routing for Service Operation PRCS_OUTPUT_IB_OPER. This routing enables the node to be an output destination for the transformed outputs.
Approval Required	This option is available when the Type column is set to <i>IB Node</i>. Select to request that the transformed output file be reviewed and approved before you distribute its output data to external destinations. If the Approval Required option is selected, then at report runtime: - The transformed output file is posted to the repository for review. Note: The Distribution Status column displays <i>Pending</i> until the transformed output file is reviewed, approved, and published. - The owner who submits the process can review the result output using Process Monitor. - After the result output file is reviewed and approved, it is distributed using the Integration Broker framework based on the Integration Broker node set on the Process Scheduler Request page. If the Approval Required option is not selected, then at report runtime: - The result output file is not posted to the report repository. - The result output file is distributed using the Integration Broker framework based on the Integration Broker node set on the Process Scheduler Request page.

Field or Control	Description
Transformation	This option is available when the Format column is set to <i>XFORM</i>. This option is required for generating customized output. Select a transformation option from the list of valid XSLTs that were previously defined for the selected query. The selected transformation will determine the XSLT to be applied to the query XML data.

Reviewing and Publishing the Transformed Output

If the **Approval Required** check box in the Process Scheduler Request page is selected, the query owner who submits the process can access the Process Monitor to review the output and then publish the output to the external destinations after it is approved.

Note: In general, the available distribution statuses are N/A (not available), Generated, Posting, and Posted. You can view the output from a web browser when the process displays the distribution status of Posted. If the process runs with the output type set to IB Node and the output format set to XFORM, then the Pending distribution status is also available. The Pending status indicates that the transformed output files were transferred to the report repository and must be reviewed and published.

To review and publish the transformed output files:

1. Access the Process Monitor page.
2. Click the **Details** link to access the Process Detail page.
3. Click the **View Log/Trace** link to access the View Log/Trace page.

If the process has the run status of Success and the distribution status of Pending, then the **Publish** link appears next to the request output.

This example shows the View Log/Trace page with a list of the output files and the **Publish** link.

View Log/Trace

Help

Report

Report ID 75

Process Instance 9274

Message Log

Name PSQUERY

Process Type Application Engine

Run Status Success

drillingURLs using MSN w/xform

Distribution Details

Distribution Node HTTPS

Expiration Date 05/05/2025

File List

Name	File Size (bytes)	Datetime Created	Publish
AE_PSQUERY_9274.stdout	302	04/28/2025 4:19:04.352837PM PDT	
QE_XFORM_DRILLING_URLS_MSN-9274.TXT	4,699	04/28/2025 4:19:04.352837PM PDT	Publish

Distribute To

Distribution ID Type	Distribution ID
User	QEDMO

Return

- Optionally, review the output file by clicking the **Name** link in the file List section.
- Click the **Publish** link to send the output to the request Integration Broker node, which is defined in the Process Scheduler Request page.

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.

This example illustrates the fields and controls on the Process Scheduler Request page. Definitions for the fields and controls appear following the example.

Process Scheduler Request

×

User ID

QEDMO

Run Control ID

RUN_QRY

Server Name

Run Date

04/21/2025

Recurrence

Run Time

1:36:37AM

Reset to Current Date/Time

Time Zone

Process List

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

OK

Cancel

Field or Control	Description
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) of the process as it appears in the process or job definition.

Field or Control	Description
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 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: File: Writes the output to the file that you indicate in the Output Destination field. Note: If you set Type value to <i>File</i> or <i>Printer</i>, you must enter the name of the directory in the Output Destination field. Printer: 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. Email: 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 BI Publisher. See “Setting Report Distribution” (PS/nVision). Note: If a query result includes a file without data, the email subject indicates that the report was empty. Using Scheduled Query, you can schedule queries to run and have the results email directly to recipients as an attachment. If a report fails to run, no email is sent. If no file is found, the email will contain a meaningful message to inform recipients. If sending email is successful, process status is be marked as success; otherwise, it ends in error. If the generated output file is too large, the email is returned to the sender with information to indicate any attachment size limitations. Feed: Sends query results as feeds. You have to enter query prompts values, select the Format as <i>Atom</i>, and select a feed definition which matches the query prompts values. If there are no existing feeds with matching prompt values, all the scheduled feeds appear. You can select any scheduled feed to make a copy of that feed and later also change the title of the new cloned feed.

Field or Control	Description
	See “Understanding Query Feeds” (Feed Publishing Framework), “Publishing Query Feeds” (Feed Publishing Framework), “Defining Advanced Options for Query Feeds” (Feed Publishing Framework), “Using Query Feeds” (Feed Publishing Framework). • <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 <i>Report Window</i> 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. • <i>IB Node</i>: Select the IB Node option to generate custom output using the IB framework. The selected Integration Broker node defines the destination of the output. Note: The Node, Approval Required, and Transformation columns are available after the Type column is set to <i>IB Node</i>. See “Scheduling and Distributing Query and Connected Query Results with Transformation” in the Scheduling Queries section.

Field or Control	Description
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 becomes unavailable. Select the <i>XFORM</i> option to display the Transformation column. You must define a transformation to submit the process. See “Scheduling and Distributing Query and Connected Query Results with Transformation” in the Scheduling Queries section. 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. To get text-wrapping support for very long text fields, use HTML format. 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. XML format is for producing webbrowser XML format result. XMLP format is producing XMLP format result.
Node	This column is available when the Type column is set to <i>IB Node</i>. Select one node from the list of the external Integration Broker nodes that are valid to receive query output with transformation; for example, the IB external node with routing defined for the query transformation service operation.

Field or Control	Description
Approval Required	This column is available when the Type column is set to <i>IB Node</i>. Select to request that the transformed output be reviewed and approved before you distribute the output data to the external destinations. If the Approval Required option is selected, then at the report runtime: • The result output file is posted to the repository for review. • The owner who submits the process can review the result output using Process Monitor. • After the result output file is reviewed and approved, it is distributed using the Integration Broker framework based on the Integration Broker node set on the Process Scheduler Request page. If the Approval Required option is not selected, then at the report runtime: • The result output file is not posted to the report repository. • The result output file is distributed using the Integration Broker framework based on the Integration Broker node set on the Process Scheduler Request page. See “Reviewing and Publishing the Transformed Output” in Scheduling Queries.
Distribution	Click to access the Distribution Detail page, where you enter additional distribution information when the output type is <i>Web</i>, Window, or <i>Email</i>. Also use this page to select a folder name to which the output should be distributed when the output type is <i>Web</i> or <i>Window</i>.
Output Destination	Enter the file directory path or printer destination for the output. For example, <i>C:\Documents and Settings\admin\psft\pt\8.5x\appserv\prcs\QEDMO\log_output</i>. Note: This field is available only when the output type that you select is <i>File</i> or <i>Printer</i>. If you select an output destination (OutDest) for a process at the process definition level, this field is populated with that output destination. See “PeopleCode Syntax Quick Reference” (PeopleCode API Reference).

Field or Control	Description
Transformation	This column is available when the output format is set to <i>XFORM</i>. Select a transformation from the list of valid transformations that were defined for the query or connected query. See Extracting and Transforming Data from PeopleSoft Pure Internet Architecture.

This example illustrates the fields and controls on the Distribution Detail page. Definitions for the fields and controls appear following the example.

Distribution Detail
×

[Help](#)

Process Name PSQUERY

Process Type Application Engine

Folder Name ▼

Retention Days 7

Email Only

Email Subject

Message Text

Email Address List

Email With Log: ☐

Email Web Report: ☐

Override Sender Email Id: ☐

Suppress Empty Result: ☐

Distribute To

*ID Type	*Distribution ID		
User ▼	QEDMO Q	+	-

OK
Cancel

Field or Control	Description
Folder Name	Select a folder name to which the output should be distributed when the output type is <i>Web</i> or <i>Window</i> .
Retention Days	Enter the number of days the output is stored in the report repository before it is expired and purged by the purge process for the selected process request.
Email Subject	Enter the subject of the distribution email.
Message Text	Enter the text to be included in the distribution email.
Email Address List	Enter the email addresses of those users who would be notified about the completion of process request.
Email With Log	Select if the email has to be sent with log.
Email Web Report	Select if the email must contain web report.
Override Sender Email Id	Select to override the Sender Email ID for email notifications.
Suppress Empty Result	Select to suppress sending query result through an email if the query returns empty result set. When this check box is not selected, an email is sent with "No matching rows were found" as the subject if the query returns no data.

To select a process request:

1. Select **Reporting Tools > Query > Schedule Queries**.
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.
4. Click the **OK** button 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 selecting **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.

This example illustrates the fields and controls on the Process Monitor - Process List page. Definitions for the fields and controls appear following the example.

The screenshot shows the 'Process Monitor' interface with the 'Process List' tab selected. At the top, there are filters for 'View Process Requests' including 'User ID' (set to 'DEMO'), 'Type' (dropdown), 'Last' (dropdown), 'Days' (dropdown), and 'Run Status' (dropdown). There are buttons for 'Refresh', 'Clear', and 'Report Manager'. Below the filters is a table with the following columns: Select, Instance, Seq, Run Control ID, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, Details, and Actions. The table contains 16 rows of process requests, including 'PTSEARCHREPORTS', 'PurgeSUN', 'PurgeSUN', 'PurgeSUN', 'PurgeSUN', 'PTPORTALREGISTRY_NCR', 'RUNDRCS1', 'RUNDRCS1', 'RUNDRCS1', 'RUNDRCS1', 'RUNDRCS1', 'RUNDRCS1', 'RUNDRCS1', 'RUNDRCS1', 'RUNDRCS1', 'RUNDRCS1', and 'RUNDRCS1'. Each row has a 'Details' link and an 'Actions' link.

Field or Control	Description
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, and then select a unit type from the drop-down list. Values are <i>Days</i> , <i>Hours</i> , and <i>Minutes</i> .

Field or Control	Description
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> , <i>Pending</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.

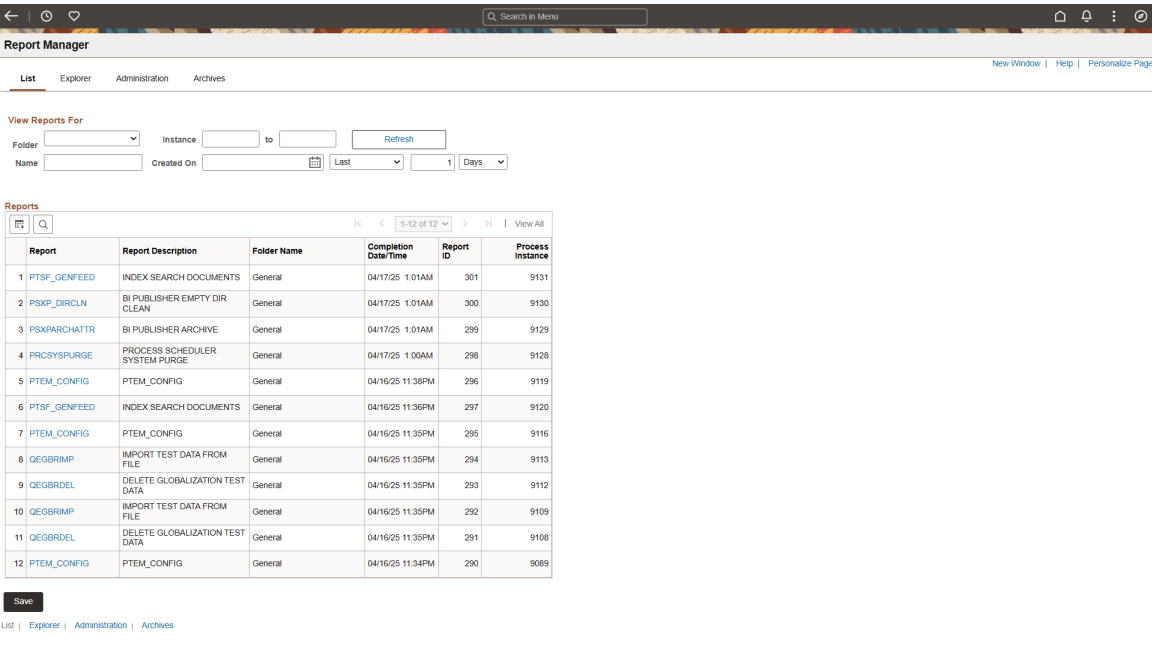
Viewing Output in Report Manager

Report Manager is like your own personal in-box 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.

You can view all of your reports by opening your Report List in your browser.

To access the Report Manager, select **Reporting Tools > Report Manager** or click the **Report Manager** link on the Schedule Query page.

This example illustrates the fields and controls on the Report Manager - List page.



Note: BI Publisher reports can also be viewed by navigating to **Reporting Tools > BI Publisher > Search for BIP Reports**.

Related Links

- “Viewing the Status of Processes” (Process Scheduler)
- “Requesting Reports in PeopleSoft Applications” (Applications User’s Guide)
- “Checking the Status of Reports” (Applications User’s Guide)
- “Viewing Reports in Report Manager” (Applications User’s Guide)
- “Searching the BI Publisher Report Repository” (BI Publisher for PeopleSoft)

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.

Related Links

- “Understanding User Profiles” (Security Administration)

Organizing Queries

Page Used to Organize Queries

Use the Query Viewer search page – Action drop-down list to organize queries.

This example illustrates the Query Viewer search page with the **Action** drop-down list expanded.

The screenshot shows the Query Manager interface. At the top, there's a search bar with a dropdown for 'Query Name' and a text input for 'begins with' containing 'QE_EM'. Below this is a 'Search' button and a link to 'Advanced Search'. The 'Search Results' section shows a dropdown for 'Folder View' set to 'All Folders'. Below that are 'Check All' and 'Uncheck All' buttons. The 'Action' dropdown is expanded, showing options: 'Add to Favorites', 'Copy to User', 'Delete Selected', 'Move to Folder', and 'Rename Selected'. The main table lists queries with columns for 'Query Name', 'Descr', and 'Public'. The table has 5 rows of query data. To the right of the table are buttons for 'Edit', 'Run to HTML', 'Run to Excel', 'Run to XML', 'Schedule', and 'Lookup References'.

Select	Query Name	Descr	Public	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	Lookup References
☐	QE_EMPDEPT	Employee Count By Department		Edit	HTML	Excel	XML	Schedule	Lookup References
☐	QE_EMPDEPT_10100	Employee Count By Department	Public	Edit	HTML	Excel	XML	Schedule	Lookup References
☐	QE_EMPLOYEE	QE Employee Info	Public	Edit	HTML	Excel	XML	Schedule	Lookup References
☐	QE_EMPLOYEE_DOUBLE_DEFPROMPT	QE Employee Info	Public	Edit	HTML	Excel	XML	Schedule	Lookup References
☐	QE_EMPLOYEE_DOUBLE_PROMPT	QE Employee Info	Public	Edit	HTML	Excel	XML	Schedule	Lookup References

The available options in the **Action** drop-down list are:

- **Add to Favorites**

Use this option to add queries to the My Favorite Queries list.

- **Copy to User**

Use this option to copy private queries to other users' list of queries.

Note: The user who is being copied to must have access to the records with which the query is associated. If that user does not have access, the query does not appear in that user's search list.

- **Delete Selected**

Use this option to delete the selected queries from the database.

- **Move to Folder**

Use this option to move queries to folders.

- **Rename Selected**

Use this option to change the names of the selected queries.

Adding Queries to the My Favorite Queries List

You can access the frequently used queries from the Query Manager search page or the Query Viewer search page by designating those queries as favorites. After you create one or more favorites, the My Favorite Queries section appears on the Query Manager search page and Query Viewer search page. You can access the favorite queries without performing the query search and you have the options to remove the queries from the My Favorite Queries section as needed.

Note: Queries in the My Favorite Queries list are linked to the user ID.

This is an example of the Query Manager search page, My Favorite Queries section. You can click the triangular arrow next to the My Favorite Queries label to expand and collapse the section.

The screenshot shows the Query Manager search page. At the top, there's a search bar with a dropdown menu set to 'Query Name' and a 'Search' button. Below the search bar, there's a section titled 'My Favorite Queries' which is expanded. This section contains a table with columns: Query Name, Descr, Owner, Folder, Edit, Run to HTML, Run to Excel, Run to XML, Schedule, Definitional References, and Remove. The table lists four queries: QE_EMPDEPT, QE_EMP_LIST2, QE_PSRCH_NODEPIC, and QE_PSRCH_NODEPIC_IMG. Each query has a corresponding 'Remove' button. Below the table, there's a 'Clear Favorites List' button.

Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Remove
QE_EMPDEPT	Employee Count By Department	Public		Edit	HTML	Excel	XML	Schedule	Lookup References	[-]
QE_EMP_LIST2	QE Employee Info	Public		Edit	HTML	Excel	XML	Schedule	Lookup References	[-]
QE_PSRCH_NODEPIC	Employee search	Public		Edit	HTML	Excel	XML	Schedule	Lookup References	[-]
QE_PSRCH_NODEPIC_IMG	Employee Image	Public		Edit	HTML	Excel	XML	Schedule	Lookup References	[-]

To add a query to the My Favorite Queries list:

1. Select **Reporting Tools > Query > Query Manager**.
2. Click the **Search** button.
3. On the Query Manager search results page, select the query that you want to add to the My Favorite Queries section.

Note: If you want to add multiple queries to the My Favorite Queries section at once, you can select multiple queries at this step.

4. Select the *Add to Favorites* option from the **Action** drop-down list.
5. Click the **Go** button.

The selected query or queries appear in the **My Favorite Queries** section.

Note: You can also click the **Favorite** links in the Query Viewer search page to add the queries to the My Favorite Queries section.

Removing Queries From the My Favorite Queries List

My Favorite Queries list appears on the Query Manager search page or on the Query Viewer search page.

- To remove a query from the My Favorite Queries list, click the **Remove** button (the minus button) next to the query that you want to remove.
- To remove all queries from the My Favorite Queries list, click the **Clear Favorites List** button.

Creating and Using Folders

You can use folders and folder structure to organize queries. Note that:

- All folders are visible to all users.
- Only public queries and the user's private queries appear in a folder.
- A query can be stored in only one folder other than the All Folders view.

Copying Queries to Another User's List of Queries

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

Note: Only non-public queries can be copied to another user's list of queries.

If the target user does not have permission to access all records in the copied queries, those queries do not appear in the target user's list of queries. After permission is granted, the copied queries appear in his or her list of queries.

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.
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 queries.
6. Click the **OK** button.

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.
4. Click the **Go** button.

The Move to Folder page appears.

5. Select one of the following options:

- *Select an existing folder to move to:* From the drop-down list, 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 the **OK** button.

Working with Advanced Query Options

Working with Aggregate Functions

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.

<i>Aggregate Function</i>	<i>Action</i>
Sum	Adds the values from each row and displays the total.
Count	Counts the number of all rows in the query result including the null-value rows and duplicated rows.
Count Distinct	Counts the number of nonnull-value rows in the query result, and the duplicated rows are counted once.
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. Select **Reporting Tools > Query > Query Manager**.
2. In Query Manager, select the Fields tab.
3. Click the **Edit** button that is associated with the appropriate field.

The Edit Field Properties page appears.

4. Select the aggregate function that you want to use for this field, and click the **OK** button.

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.

Related Links

[Defining Expressions](#)

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.

This example illustrates the fields and controls on the Criteria page when you are using a subquery.

Query Name EMPLOYEE Description EMPLOYEE [Feed](#)

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

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

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.EFFDT - Effective Date	Eff Date <=	Current Date	Edit	-
AND	A.EMPLID - Empl ID	in list	SUBQUERY	Edit	-
AND	A.EFFDT - Effective Date	equal to	A.EFFDT - Effective Date	Edit	-

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

This example illustrates the fields and controls on the Query page when you are creating a subquery.

Query Name EMPLOYEE Description EMPLOYEE [Feed](#)

Working on selection Subquery for A.EMPLID - Empl ID [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
B QE_EMPL	

[Hierarchy Join](#) [-](#)

Fields	Find	View All	First	1-4 of 4	Last
Select EMPNAME - EMPNAME					
Select EMPLID - Empl ID					
Select DEPTID - Department					
Select DEPTNAME - Department					

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

[Return To Search](#)

To create subqueries:

1. Select **Reporting Tools > Query > Query Manager**.
2. Click the **Use As Criteria** icon 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 an 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.

In addition, if using drilling URLs, both queries in a union must have a drilling URL mapped to a field. The number of drilling URLs defined in the top level of the query must be the same.

Note: Values from the related language record are not retrieved for union queries.

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

In Oracle databases, PeopleSoft LongCharacter fields use the CLOB datatype when their length definition exceeds 1333. Since CLOBs (and other binary datatypes) are not valid columns for all operators, all queries including columns with LongCharacter field length definition that exceeds 1333 should not include the UNION operator.

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.

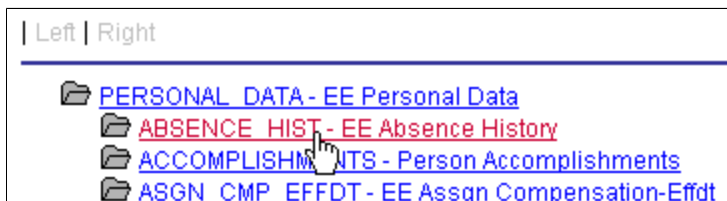
The procedure for joining tables differs depending on how the tables that are being joined are related to each other. Query Manager recognizes three types of joins: record hierarchy, related record, and any record.

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.)

Note: You can specify the parent/child relationship using the **Parent Record Name** option in PeopleSoft Application Designer.

This example shows how to perform hierarchy joins with the ABSENCE_HIST record is selected.



To create a record hierarchy join:

1. In Query Manager (**Reporting Tools > Query > Query Manager**) select the base record for your query.
2. Select the appropriate fields and criteria.
3. From the Query page, click the **Hierarchy Join** link.

All of the records that have a parent/child relationship with your selected record appear.

4. Select the second record for the join.

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.

This example shows the Query page. Use the Join <record name> link to join record. The QEDMO Employee record can join to the JobCode record by using the QE_JOBCODE field, or the QEDMO Employee record can join the Data Department record by using the DEPTID field.

To create a related record join:

1. In Query Manager (**Reporting Tools** > **Query** > **Query Manager**), select the base record for your query.
2. Select the appropriate fields and criteria.
3. From the Query page, click the **Related Record Join** link.
4. From the Select Join Type page, select the standard join option and click the **OK** button.

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 database. If you use a platform other than Oracle database, you can create an outer join equivalent or create a left outer join using PeopleSoft Query's left outer join feature.

The Outer Join functionality is available only in Query Manager. This functionality is not available in the 2–3 Tier Query Client.

See [Creating Left Outer Joins](#).

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.

You can join only one child record to the same parent query when the child record is added using the Records page. If you join more than one child record to the same parent query, an error message appears that says: "Left Outer joins must be joined to the last record in the query". On the contrary, you can have multiple outer joins to the same parent table if those joins are added using the Hierarchy joins link in the Query page.

This example illustrates the fields and controls on the Define Expression section.

Creating an Outer Join for Oracle Database

To create an outer join for Oracle database:

1. Access the Criteria page (**Reporting Tools > Query > Query Manager > Criteria**).
2. From the Criteria page, click the **Edit** button to the right of the required field from the primary record.
3. In the **Condition Type** drop-down list, accept the default operator value of *Equal To*.
4. In the **Expression 2 Type** section, select the value of *Expression*.

The Define Expression text box appears.

5. Click the **Add Field** link.
6. Select the required field from the secondary record.
7. Manually enter (+) after the field name.
8. Click the **OK** button.

Creating an Outer Join Equivalent for non-Oracle Platforms

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

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

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. In Query Manager (**Reporting Tools > Query > Query Manager**), create a new query or updating an existing query using the Student_Data record.
2. Select the *Customer_ID* and *Name* fields.

Because you will select 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.

3. Create two different expressions and select them for output.
4. Save the query.
5. 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 see only those students who did not complete an evaluation.

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

To add a left outer join to a record:

1. Access the Query Manager search page by selecting **Reporting Tools > Query > Query Manager**.
2. Click the **Create New Query** link, add a record, and select fields.

Alternatively, open an existing query.

3. Access the Records page.
4. Find the joining record and then click the **Join Record** link on the same row as that record.
5. Select the **Join to get additional fields only (Left outer join)** option.

Note: You can add a left outer join to any record in a query.

6. Complete the join.
 - If the **Enable Auto Join** preference is selected on the Query Preference page, click the record name to join with.
 - If the **Enable Auto Join** preference is not selected on the Query Preference page, click the **OK** button.
7. 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. 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 specifies where the criteria will appear. Select the alias that corresponds to this join record.
8. 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.
9. 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.

10. (Optional) If the query has multiple joins to the same security record, which can be resource intensive and time consuming when it runs, select the **Security Join Optimizer** option to improve the performance of this query.

See [Viewing and Editing Query Properties](#).

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 (**Reporting Tools > Query > Query Manager > Criteria**) 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.
3. Click the **OK** button.

Using Connected Query

Understanding Connected Query

Connected Query Overview

Connected Query enables you to create a single XML file based on a set of queries with parent-child relationships.

A connected query is a hierarchical object built with existing PeopleSoft queries. A parent query can nest n levels of child queries and any child query can have m sibling queries within a hierarchy. No artificial limits exist for n and m , but typical use involves a single parent-child relationship or a few levels of nesting. Fields in a child query are mapped to related fields in the immediate parent query. A connected query returns a hierarchical data set in which data returned by child queries is filtered by the results of its immediate parent query.

Connected queries are used to analyze data, supply to other systems with PeopleSoft data using Web Services, and create BI Publisher reports that use connected query as a Data Source.

See “Creating Data Sources” (BI Publisher for PeopleSoft), “Registering Data Sources” (BI Publisher for PeopleSoft), “Running BI Publisher PeopleSoft Query Reports” (BI Publisher for PeopleSoft).

Connected queries are significantly useful:

- To simplify task for a business user.

User create a set of linked simple queries to collect data from multiple tables instead of creating a complicated query with multiple equal, outer joins, and grouping conditions.

- As a tool to combine the main report and its subreports in the same template for using with BI Publisher reports.
- When outputs need to be in structured XML.

A simple query (including a query with multiple joins) creates a tabular plain layout. To have a hierarchical output, you need to use multiple grouping conditions that involve complicated logic and is not always straight forward. Connected Query processing creates a hierarchical output where a single row of data from parent query results in a set of rows in a child query. This data is processed row by row and produces structured data. It has similarity with SQR and Application Engine nested loops processing.

Instead of using Application Engine or SQR to collect data for file processing by BI Publisher, use Connected Query as the data collection tool because no conditional logic involves in this process. However, use SQR for processes with high volume of data or when high performance is required.

You can quickly create a single parent-child relationship using the Connected Query Quick Start component (CQ_WIZARD), and create complex connected queries using the Connected Query Manager (PSCONQRS).

Note: Queries with In-Tree prompt cannot be used in Connected Query.

Connected Query Terms

<i>Field or Control</i>	<i>Description</i>
Parent Query	A parent query in a connected query is a query that has one or many child queries. The top level query in a connected query is the parent query.
Child Query	A child query in a connected query is a query that has a single parent query. A child query can also serve as a parent query if it has one or more child queries in the Connected Query definition. A child query can have one or more sibling queries.
Sibling Query	A sibling query in a connected query is a child query that shares a parent with another child query.
Public Connected Query	Public connected query is a query that can be used by all users. Note: Public connected queries cannot include any private query.
Private Connected Query	Private connected query is a query that can be used only by its creator. Note: Private connected queries include public queries and private queries that have been created by the same user.
Mapping Query Fields	Mapping query fields establishes the filtering relationship between values of selected fields in a child query and the corresponding fields in the parent query.
	Use the Help icon to retrieve help for a specific topic. Note: The Help icon is available in Connected Query Quick Start and on the Connected Query Properties page (PSCONQRSPROPS) in Connected Query Manager.

Connected Query Example

This example shows the structure that Connected Query uses to collect data of each employee, who directly and indirectly reports to specific departments.

The screenshot shows the 'Connected Query Manager' window. At the top, the 'Connected Query' is 'QE_EMPLOYEE_REPORTING_DETAILS'. Below it, 'Owner ID' is 'PeopleTools Demo' and '*Status' is 'Active'. There are buttons for 'Transformations', 'Properties', and a 'Public' checkbox. A 'Description' section contains a 'Description' field with 'Employee Reporting Rollup' and a 'Comments' field with 'Employee Reporting Details based on QE_PERS_DATA tree'. A 'Parent Query Selection' section shows 'Parent Query' as 'QE_DEPARTMENTS_ROLLUP_PERS' with a 'View Query' button. Below this is a 'Connected Query Structure' table:

	Field1	Field2	Field3
QE_DEPARTMENTS_ROLLUP_PERS	A.SETID	A.TREE_NAME	B.TREE_NODE_NUM
QE_EMPLOYEE_FROM_PERSDATA_TREE	A.SETID	A.TREE_NAME	A.TREE_NODE_NUM
QE_EMPLOYEE			
QE_DEPARTMENT_DATA			

At the bottom, there is a 'Preview XML' button, a 'Max Rows Fetched for Query' field set to '6', and 'Save' and 'Cancel' buttons.

In this example:

- The first query (QE_DEPARTMENTS_ROLLUP_PERS) selects a list of departments that report to a specific department defined by user in the first query prompt.
- The second query (QE_EMPLOYEE_FROM_PERSDATA_TREE) selects lists of employee based on the departments returned from the parent query.

Query QE_EMPLOYEE displays detailed information of every employee that is selected by query QE_EMPLOYEE_FROM_PERSDATA_TREE.

- The last query (QE_DEPARTMENT_DATA) displays detailed information of each department that participated in the report.

Connected Query Processing Options

You can run a connected query using one of the following options:

- PeopleCode-based Preview XML

Connected Query Report Developers use the **Preview XML** button to run a connected query using the application server when they build a new or edit an existing connected query. This option does not require saving the connected query to the database.

See [Using Connected Query Viewer](#).

- C++ based CQRuntime

End users use the CQRuntime option to run a connected query using the Process Scheduler server. This method requires saving the connected query object to the database before running it.

See [Using Connected Query Scheduler](#).

- C++ based CQRuntime with the OrderBy Runtime option

If you use C++ based CQRuntime with the OrderBy Runtime option, parent and child queries are dynamically altered to include the ORDER BY clause, every SQL statement runs once, and the connected query dramatically cuts the number of SQL statements that are generated at runtime. As a result, processing is faster and consumes fewer server resources.

Note: Report developers can set the OrderBy processing option for all members or some members of the specific connected query.

See the Using the OrderBy Processing Option section in [Using Connected Query Manager](#).

Security for Connected Query

The following table lists the delivered Connected Query permission lists and roles.

<i>Permission List</i>	<i>Role</i>	<i>Description</i>
PTPT2700	Connected Query Developer	Provides full access to Connected Query applications.
PTPT2800	Connected Query User	Provides access to run, preview results, and schedule a connected query. Users are not able to modify existing or create new connected queries.

Using Connected Query Quick Start

Understanding Connected Query Quick Start

The Connected Query Quick Start is a wizard that walks you through creating a simple connected query with a single parent query and a single child query linked using a set of related fields.

Note: The parent and child queries must exist and be visible in Query Manager before you can use them to create a connected query.

You cannot specify a child query in a connected query that is defined in a union.

Connected Query Quick Start is used only for creating new connected queries. You can edit existing connected queries using the Connected Query Manager page.

Connected query uses query security permissions for each of its member queries.

Related Links

[Creating New Queries](#)

[Understanding Connected Query Manager](#)

Step 1: Enter Connected Query Name and Descriptive Information

Use the Connected Query Quick Start - Step 1 (CQ_WZ_INFO) to enter a connected query name and descriptive information, and define ownership of the connected query.

Navigation:

Reporting Tools > Connected Query > Connected Query Quick Start

This example illustrates the fields and controls on the Connected Query Quick Start - Step 1. Definitions for the fields and controls appear following the example.

Connected Query Quick Start

Step 1 of 5

Create a simple parent-child Query relationship between two Queries

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Enter Connected Query Name and Descriptive Information

*Connected Query:

ENROLLMENT_CRSE_SSNN

☒ Public

Description:

Enrollment and Course Session

Comments:

List of enrollment for each course session.

Field or Control	Description
Connected Query	This is a required field. Enter a name for the connected query. Note: The name of the connected query cannot be changed after you enter the name into the Select a Child Query page of a Connected Query Quick Start. Because Connected Query uses query name as an XML node, query names used in a Connected Query must follow these naming rules: - Query names can include letters, numbers, and other characters. However, query names cannot include spaces. - Query names can start with letters <i>xml</i> (or <i>XML</i>, <i>Xml</i>, and so on). However, these names cannot consist of only three letters <i>XML</i>. - Query names cannot start with a number nor a punctuation character. If a query name starts with an alpha or underscore [_] character, the query node name in an XML file will be the same as the query name. Otherwise, the query node name will be the query name with the prefix <i>PS_</i>. For example: - Query <code>MyQuery123</code> is written to the output XML file as <code>MyQuery123</code>. - Query <code>_MyQueryA</code> is written to the output XML file as <code>_MyQueryA</code>. - Query <code>123MyQuery</code> is written to the output XML file as <code>PS_123MyQuery</code>.
Public	Indicate the query ownership. If the Public check box is selected, this connected query will be public. If the Public check box is not selected, this connected query will be private. Note: The ownership of the connected query cannot be changed after you enter data into the Select a Child Query page of a Connected Query Quick Start.
Description	(Optional) Enter a description for the connected query.
Comments	(Optional) Enter comments for the connected query.

Field or Control	Description
Next	Note: The Next button is available after you enter the name of the connected query in the Connected Query field and move to any other field. Click to advance the wizard to the next page.

Step 2: Select a Parent Query

Use the Connected Query Quick Start - Step 2 (CQ_WZ_PARENT) to select an existing query to use as the parent query.

Navigation:

- 1. Select **Reporting Tools > Connected Query > Connected Query Quick Start**.
- 2. Enter a connected query and descriptive information, and click the **Next** button.

This example illustrates the fields and controls on the Connected Query Quick Start - Step 2. Definitions for the fields and controls appear following the example.

Connected Query Quick Start

Step 2 of 5

Create a simple parent-child Query relationship between two Queries

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Select a Parent Query

Connected Query Definition

Connected Query

ENROLLMENT_CRSE_SSNN

☒ Public

Description

Enrollment and Course Session

Comments

List of enrollment for each course session.

Parent Query:

ENROLLMENTS

View Query

Field or Control	Description
Parent Query	Click the query Lookup icon to select a parent query from a list of queries for which you have been granted access. Note: You must use the query Lookup icon to select a parent query and be able to move to the next page.
View Query	Click to open Query Manager component in read-only mode to view the query.

Field or Control	Description
Next	This button becomes active after you select a parent query. Click to advance the wizard to the next page.

Step 3: Select a Child Query

Use the Connected Query Quick Start - Step 3 (CQ_WZ_CHILDQRY) to select an existing query to use as the child query.

Navigation:

1. Select **Reporting Tools > Connected Query > Connected Query Quick Start**.
2. Enter a connected query and descriptive information, and click the **Next** button.
3. Select an existing query to use as the parent query, and click the **Next** button.

This example illustrates the fields and controls on the Connected Query Quick Start - Step 3. Definitions for the fields and controls appear following the example.

Connected Query Quick Start
Step 3 of 5

Create a simple parent-child Query relationship between two Queries

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Select a Child Query

Connected Query Definition

Connected Query ENROLLMENT_CRSE_SSNN
☒ **Public**

Description Enrollment and Course Session

Comments List of enrollment for each course session.

Connected Query Structure

ENROLLMENTS

CRSE_SESSIONS

Child Query:

Field or Control	Description
Child Query	Click the query Lookup icon to select a child query from a list of queries for which you have been granted access. After you select a child query, its name appears in the Connected Query Structure section.
View Query	This button becomes active after you select a child query. Click to open Query Manager component in read-only mode to view the query.
Next	This button becomes active after you select a child query using the Lookup icon. Click to advance the wizard to the next page.

Step 4: Map Child Query Fields to Parent Query for Filtering

Use the Connected Query Quick Start - Step 4 (CQ_WZ_FLDMAP) to map query fields from a child query to corresponding fields from a parent query.

Navigation:

1. Select **Reporting Tools > Connected Query > Connected Query Quick Start**.
2. Enter a connected query and descriptive information, and click the **Next** button.
3. Select an existing query to use as the parent query, and click the **Next** button.
4. Select an existing query to use as the child query, and click the **Next** button.

This example illustrates the fields and controls on the Connected Query Quick Start - Step 4. Definitions for the fields and controls appear following the example.

Connected Query Quick Start

Step 4 of 5

Select fields from each Query then click 'Map Fields' button to map.

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Map Child Query fields to Parent Query fields for Filtering

Connected Query Definition

Connected Query

ENROLLMENT_CRSE_SSNN

☒ Public

Description

Enrollment and Course Session

Comments

List of enrollment for each course session.

Connected Query Structure

ENROLLMENTS

CRSE_SESSIONS

Select fields from each Query then click 'Map Fields' button to map.

Map Fields

Parent Query - ENROLLMENTS

Key	Parent Query Field	Format
	B.STUDENT_NAME - Student Name	CHAR 50
	A.COURSE - Course Code	CHAR 6
	A.ENROLL_DT - Enroll Date	DATE 10
	A.ENROLL_STATUS - Enrollment Status	CHAR 3

Child Query - CRSE_SESSIONS

Select	Key	Select a Child Query Field	Format	*Select a Parent Query Field
☐		A.TRAINING_LOC - Training Location	CHAR 6	
☐		A.START_DATE - Start Date	DATE 10	
☐		A.END_DATE - End Date	DATE 10	
☒		A.COURSE - Course Code	CHAR 6	A.COURSE
☐		A.INSTRUCTOR - Instructor	CHAR 4	

This page displays two sets of fields coming from parent and child queries:

- The parent query section displays parent query fields and is for informational purposes only.

This section is collapsed by default and you have the option to expand it.

- The child query section displays child query fields and enables the report developer to select one or more fields for mapping.

For each child query field selection, a drop-down list with possible parent query field lists appears. Those parent query field lists are filtered by compatible field data types. In some cases, Connected Query Manager uses *smart thinking* to map fields based on partial matching names but ultimate field matching is up to the user.

Field or Control	Description
Map Field	Click to update the Connected Query structure. Note: The Fields column in the Connected Query Structure section displays the values that you just selected.
Next	This button becomes active after you select the fields for mapping and click the Map Fields button. Click to advance the wizard to the next page.

This example illustrates the fields and controls on the Connected Query Quick Start - Step 4. Fields are mapped and Connected Query structure is updated.

Connected Query Quick Start

Step 4 of 5

Select fields from each Query then click 'Map Fields' button to map.

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Map Child Query fields to Parent Query fields for Filtering

Connected Query Definition

Connected Query ENROLLMENT_CRSE_SSNN ☒ **Public**

Description Enrollment and Course Session

Comments List of enrollment for each course session.

Connected Query Structure	Field1
ENROLLMENTS	A.COURSE
CRSE_SESSIONS	A.COURSE

Map Fields

Select fields from each Query then click 'Map Fields' button to map.

Select	Key	Select a Child Query Field	Format	*Select a Parent Query Field
☐		A.TRAINING_LOC - Training Location	CHAR 6	
☐		A.START_DATE - Start Date	DATE 10	
☐		A.END_DATE - End Date	DATE 10	
☒		A.COURSE - Course Code	CHAR 6	A.COURSE
☐		A.INSTRUCTOR - Instructor	CHAR 4	

Step 5: Preview a Connected Query

Report developers use the Connected Query Quick Start - Step 5 (CQ_WZ_PREVIEW) to review a new connected query and preview the results by running it in a preview mode with a limited number of rows returned from each query.

Navigation:

1. Select **Reporting Tools > Connected Query > Connected Query Quick Start**.
2. Enter a connected query and descriptive information, and click the **Next** button.
3. Select an existing query to use as the parent query, and click the **Next** button.
4. Select an existing query to use as the child query, and click the **Next** button.

- Map query fields from a child query to corresponding fields from a parent query, and click the **Next** button.

This example illustrates the fields and controls on the Connected Query Quick Start - Step 5. Definitions for the fields and controls appear following the example.

Connected Query Quick Start

Step 5 of 5

Create a simple parent-child Query relationship between two Queries

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Complete
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Preview

Connected Query Definition

Connected Query ENROLLMENT_CRSE_SSNN ☒ **Public**
Description Enrollment and Course Session
Comments List of enrollment for each course session.

Connected Query Structure	Field1
ENROLLMENTS	A.COURSE
CRSE_SESSIONS	A.COURSE

Preview XML
Max Rows Fetched for Query:

```

<?xml version="1.0" encoding="utf-8"?>
<ConnectedQuery name="ENROLLMENT_CRSE_SSNN" preview="True" query_rows_limit="6"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:noNamespaceSchemaLocation="">
  <ENROLLMENTS>
    <B.STUDENT_NAME><![CDATA[Lincoln,Jennifer]]></B.STUDENT_NAME>
    <A.COURSE><![CDATA[1001]]></A.COURSE>
    <A.ENROLL_DT>2010-01-15</A.ENROLL_DT>
    <A.ENROLL_STATUS><![CDATA[Completed]]></A.ENROLL_STATUS>
    <CRSE_SESSIONS>
      <A.TRAINING_LOC><![CDATA[MXO]]></A.TRAINING_LOC>
      <A.START_DATE>2012-03-09</A.START_DATE>
      <A.END_DATE>2012-03-13</A.END_DATE>
      <A.COURSE><![CDATA[1001]]></A.COURSE>
      <A.INSTRUCTOR><![CDATA[HMH]]></A.INSTRUCTOR>
    </CRSE_SESSIONS>
    <CRSE_SESSIONS>
      <A.TRAINING_LOC><![CDATA[PAR]]></A.TRAINING_LOC>
      <A.START_DATE>2012-07-13</A.START_DATE>
      <A.END_DATE>2012-07-17</A.END_DATE>
    </CRSE_SESSIONS>
  </ENROLLMENTS>
</ConnectedQuery>

```

Field or Control	Description
Preview XML	Click to display the formatted XML output for this connected query. XML output appears in a Preview mode, in the lower section of the Preview page.
Max Rows Fetched For Query	Enter the maximum number of rows to display in Preview mode by each member query. Note: You should limit the number of rows that are being fetched. The default value is 6. If you enter 0 or clear this text box, no row limits are imposed for a resulting XML, which can cause significant delay in getting results; and because the application runs in synchronized mode using the application server, you may get browser time-out or tuxedo time-out.
Complete	Click to transfer to Connected Query Manager page, where you can perform enhancements and save the connected query. Note: While working with a Connected Query Quick Start, you can modify your previous selections at any step by clicking the step number (in yellow or gray) icons. Changes in your selection could change a connection query structure.

Note: In the Connected Query Quick Start - Preview page, when XML that contains CDATA sections is displayed at runtime, application users will see `<![CDATA* and *]>` in places of `<![CDATA[ and ]]>`.

Using Connected Query Manager

Understanding Connected Query Manager

Connected Query Manager enables a report developer to create a new connected query, edit an existing connected query, copy existing connected queries, and delete a connected query object, as well as run connected queries in three modes:

- Preview XML
- Run to window
- Schedule

The queries you defined in a connected query must exist as PeopleSoft queries in the database. In addition, you cannot specify a child query in a connected query that is defined in a union.

Connected Query Manager supports XML output format and user-defined output format (XFORM, which triggers a transformation XSLT). Connected Query structure consists of a set of PeopleSoft queries that are linked by related fields. No limits exist for the number of fields being linked between two queries.

Parent and child pairs of queries can be linked together using sets of correlated fields, though those linkages are not required.

Each query being selected in a connected query structure has a set of image icons, which enables you to perform various actions:

Term	Definition
	Click the Insert Child Query icon to insert a new query as a child of the selected query.
	Click the Insert Sibling Query icon to insert a new query as a sibling of the selected query.
	Click the Delete Query icon to delete a selected query.
	Click the Select Related Field icon to open a related field selection section.
	Click the Open Query icon to open a selected query in Query Manager in read-only mode.

Note: While deciding which tool to use for reporting purposes, report developer should consider using a single query with joins and unions first. Using Connected Query could affect the performance of the reporting application.

The main contributing factor to the Connected Query performance is the number of nested levels. Application developer should try to minimize the depth of nesting in a Connected Query structure. Another contributing factor is the number of rows being returned from each query. To achieve a better performance, queries that are positioned higher in a Connected Query hierarchy should be limited in the number of rows being returned. This limitation could be achieved by means of using filtering in parent queries.

Related Links

“Understanding Projects” (Application Designer Developer’s Guide)

“Creating and Saving Projects” (Application Designer Developer’s Guide)

Creating a Connected Query

Use the Connected Query Manager page (PSCONQRSBUILDER) to create and maintain connected queries.

1. Select **Reporting Tools > Connected Query > Connected Query Manager**.
2. Select the Add a New Value tab.

Alternatively, click the Edit link.

This example illustrates the fields and controls on the Connected Query Manager page. Definitions for the fields and controls appear following the example.

Connected Query Manager

Connected QueryEMPLOYEE_REPORTING_DETAILS

Owner ID

Public

StatusActive

Transformations

Properties

Description

DescriptionEmployee Reporting Rollup

CommentsEmployee Reporting Details based on QE_PERS_DATA tree

Parent Query Selection

Parent QueryQE_DEPARTMENTS_ROLLUP_PERS

View Query

Connected Query Structure	Field1	Field2	Field3
QE_DEPARTMENTS_ROLLUP_PERS	A.SETID	A.TREE_NAME	B.TREE_NODE_NUM
QE_EMPLOYEE_FROM_PERSDATA_TREE	A.SETID	A.TREE_NAME	A.TREE_NODE_NUM
QE_EMPLOYEE			
QE_DEPARTMENT_DATA			

Preview XML

Max Rows Fetched for Query6

Save

Cancel

Field or Control	Description
Connected Query	Enter a name for the connected query.
Transformations	Click to access the Connected Query Transformation page, where you can view, add, or modify the list of transformation program XSLTs that are defined for the connected query.
Public	Indicate the query ownership. Select to indicate that this is a public query. Clear this check box to indicate that this is a private query. Note: Public connected queries can be run by any user with adequate permissions. Private connected queries can be run and edited only by the owner.

Field or Control	Description
Status	Select the status of the connected query. Values are: • <i>Active</i>: Enables user to schedule a connected query. • <i>In Progress</i>: Enables user to preview a connected query, but that connected query is not visible by other reporting tools—for example, BI Publisher. Any connected query with an <i>In Progress</i> status can be previewed, but not scheduled. • <i>Inactive</i>: Indicates a connected query that does not pass a validation routine.
Properties	The Properties button is active only after you select a parent query. Click to access the Connected Query Properties page.
Description	Enter a description for the connected query.
Comments	Enter comments for the connected query.
Parent Query Selection	Click the search icon to select a parent query from an existing list. Note: You must use the search icon to search for and select a parent query. After you select a parent query, all buttons become active and the Connected Query Structure section appears with active icons, which enables you to continue building a connected query.
View Query	Click to open the selected query in read-only mode in the Query Manager component. Query Manager opened from Connected Query is fully functional but does not allow you to save any changes.

Field or Control	Description
Connected Query Structure	This section appears after you select a parent query. It displays the image icons that you can use to further develop the Connected Query structure. See the Understanding Connected Query Manager section earlier in this topic for a description of the icons. Note: If parent and child queries are not linked with some fields, each row of data for a parent query will have <i>all</i> rows from a child query as no filtering from a parent to child will happen. For example, Project is a parent query and Project Description is a child query. The Project and Project Description queries are linked by the Project_ID field that will assume one-to-one relationship (assuming no EFFDT field exists in a second query). Therefore, if the Project query returns 100 rows, the Project Description query will return a single row for the Project query, and resulted data set will have 100 rows of data. If no field is selected as a mapped field (Project_ID field), Connected Query returns 100 x 100 = 10000 rows. Sometimes mapped fields are not needed, in which case the system displays a warning message when you save the connected query (Connected Query design time).
Use 'Order By' processing	This option is only available when the SupportsOrderBy option in the Connected Query Properties page is set to True. Select to apply the OrderBy processing option at runtime. Note: This option is always selected for the first query and you cannot modify it. For the following queries, this option becomes active when you click the query name in the Connected Query Structure column. The OrderBy processing option is not used if the connected query is running in the Preview XML mode. When you reopen the Connected Query Property page and set the SupportsOrderBy property to False, the Use OrderBy Processing column is not available in the Connected Query Manager page. If you later set the SupportsOrderBy property back to True, the system will display the processing property that you previously selected. See the Using the OrderBy Processing Option section in Using Connected Query Manager.
Preview XML	This button becomes active after you select a parent query. Click this button at any time to preview the XML report in a separate window.
Save	This button becomes active after you select a parent query. Click this button to save your connected query. You can save the connected query as soon as you have added one parent query.

Steps Used to Create a Connected Query

To create a connected query using Connected Query Manager:

1. Select **Reporting Tools > Connected Query > Connected Query Manager**.

2. Select the Add a New Value tab.

The Connected Query Manager page appears.

3. Enter a name in the **Connected Query** field.

The connected query name must be unique to all private and public queries.

4. Define query ownership using the **Public** check box.

By default, the **Public** check box is selected to indicate that this connected query is a public connected query. You can clear the **Public** check box if you want this connected query to be private .

5. Select the status of the connected query using the **Status** drop-down list.

Note: The *Inactive* status indicates that a connected query does not pass a validation routine. When a connected query is not valid, this status is set automatically during the Save process.

- Select the *Active* option to enable the user to schedule a connected query.
- Select the *In Progress* option to indicate that this query can be previewed in Connected Query Manager, but can not be scheduled.

The *In Progress* status is useful when a connected query is not ready for end user to view using the Connected Query Viewer page.

6. Optionally, enter description and comments for the connected query using the **Description** and **Comments** fields.

If the Description field is blank, Connected Query populates the description using the connected query name.

7. In the **Parent Query** field, click the search icon to select a parent query from an existing list.

Note: You must use the search icon to search for and select a parent query. After you select a parent query, all buttons become active and the Connected Query Structure section appears with active icons, which enables you to continue building a connected query.

8. Optionally, click the **View Query** button to view the selected query.

Note: You can preview a connected query at any point without having previously saved it.

9. Optionally, continue building your connected query by adding child queries, linking fields between parent and child queries, and so on.

10. Save your connected query.

Because connected query can be created with one parent query presented, you can save your connected query and use it as a new connected query.

Viewing and Editing Data Transformations for a Connected Query

Use the Connected Query Transformation page (PSCONQRSXSLT) to view, add, or modify the list of transformation program XSLTs that are defined for the connected query.

Navigation:

1. Select **Reporting Tools > Connected Query > Connected Query Manager**.
2. Click the Transformations button.

This example illustrates the fields and controls on the Connected Query Transformation page.

Name	File Type	Edit XSLT	Preview	
fixFormat	TXT	Edit XSLT	Preview	—
lessLabels	TXT	Edit XSLT	Preview	—

Note: When you click the Preview button to view sample output of the connected query with transformation, the maximum number of rows that will appear in the output depends on the value that you set in the Max Rows Fetched for Query field in the Connected Query Manager page.

See [Extracting and Transforming Data from PeopleSoft Pure Internet Architecture](#).

Setting Connected Query Properties

Report developers use the Connected Query Properties page (PSCONQRSPROP) to associate a set of properties with a connected query definition, modify values of execution or output XML file based on user-selected properties, and ensure that user-selected properties (with PeopleTools projects) are compatible with PeopleTools 8.50 and later releases.

Navigation:

1. Select **Reporting Tools > Connected Query > Connected Query Manager**.
2. Select the Add a New Value tab, or click the Edit link.

- On the Connected Query Manager page, click the **Properties** button.

This example illustrates the fields and controls on the Connected Query Properties page. You can find definitions for the fields and controls later on this page.

Connected Query Properties		
Connected Query Properties		
Property Name	*Property Value	Default Value
ExecutionLog	False ▼	False
IgnoreRelFieldOutput	False ▼	False
IsDebugMode	False ▼	False
ShowEmptyXML	False ▼	False
ShowFormattedXML	False ▼	False
SupportsOrderBy	False ▼	False

Field or Control	Description
ExecutionLog	The valid values are: <i>True.</i> <i>False.</i> (Default.) If ExecutionLog is set to <i>True</i>, an execution log is recorded in an appropriate log file. Recording includes regular logging and output statistics section.
IgnoreRelFieldOutput	The valid values are: <i>True.</i> <i>False.</i> (Default.) If IgnoreRelFieldOutput is set to <i>True</i>, the output XML file will not repeat mapped field nodes that are associated with a child query. For example, if a parent query has a field DEPTID linked to the child query field DEPARTMENT, node DEPARTMENT will not appear in the XML output file.

Field or Control	Description
IsDebugMode	The valid values are: • <i>True</i>. • <i>False</i>. (Default.) If IsDebugMode is set to <i>True</i>, an execution log is recorded in an appropriate log file. Recording includes regular logging and output statistics section. In addition, if application server executes the connected query (for example, PreView XML), the <i>True</i> mode preserves a directory that contains temporary files after a connected query is executed. Log also contains SQL statement that is generated by each member query as well as values of related fields used to link parent query to its child.
ShowEmptyXML	The valid values are: • <i>True</i>. • <i>False</i>. (Default.) Set the property to <i>True</i> to generate an empty XML data file when a connected query does not retrieve data while running the parent query. You can override this value for a specific connected query using the Connected Query Manager page. If this property is set to <i>True</i> and a connected query is being used as a data source for a BI Publisher report, an empty report is generated.
ShowFormattedXML	The valid values are: • <i>True</i>. • <i>False</i>. (Default.) Available options are <i>True</i> and <i>False</i> (default). If ShowFormattedXML is set to <i>True</i>, an output XML file will contain node indentations used to format XML. This output is used for XML output shown in the Connected Query Quick Start. You should set the SHOWFORMATTEDXML property to <i>True</i> if you want to use non-XML editors to work with output XML files. However, if you set the SHOWFORMATTEDXML property to <i>False</i> (default option), the output files will be smaller.

<i>Field or Control</i>	<i>Description</i>
SupportsOrderBy	The valid values are: <i>True.</i> If SupportsOrderBy is set to <i>True</i>, the Use OrderBy processing column is available in the Connected Query Manager page. <i>False. (Default.)</i> If SupportsOrderBy is set to <i>False</i>, the Use OrderBy processing column is not available in the Connected Query Manager page.

Note: You define all connected query properties as strings using the name-value pairs concept. These properties are stored in database-managed tables as a part of the connected query definition. You can preview a connected query XML without storing its properties in the database. If you move the mouse pointer to the Help icon (question mark), a pop-up window appears showing detailed information about all properties.

Using the OrderBy Processing Option

The PeopleCode-based Preview XML and C++ based traditional CQRuntime run each child query multiple times based on data rows that the parent query returns, so the Connected Query application runs the child SQL statement for every parent row with the different bind values. These two running options make the Connected Query application a universal solution that enables users to map multiple queries together without limiting the resulting object structure. Connected Query enables users to map fields between different queries, provide a number of nesting levels, and so on. If the OrderBy run-time optimization is not used, these two running options run plenty of SQL statements that could affect your system performance. The number of generated SQL statements depends on the number of nested levels and on the number of data rows that are returned by higher level queries. The following example describes the difference in executions with and without using of the OrderBy processing option.

Suppose that the connected query EMP_ADR consists of these two hierarchical queries that are linked by the field EMPL_ID:

```
EMP_DET (Level 0)
  EMP_ADDRESS (Level 1)
```

Applying the PeopleCode-based Preview XML and C++ based CQRuntime options, each of the above queries performs a SELECT from a single table. Connected Query application generates the following SQL statements:

```
Level 0: SELECT EMPLID, NAME FROM EMP_DET
Level 1: SELECT EMPLID, ADDRESS FROM EMP_ADDRESS WHERE EMPLID=:1
```

In the previous SQL statements, Level 1 query (EMP_ADDRESS) runs for every row returned from the Level 0 query (EMP_DET) using a bind variable that is dynamically substituted with the EMPLID field value being returned from the Level 0 query.

If you apply the OrderBy Processing option, both queries are dynamically altered to include the ORDER BY clause, and the Connected Query application generates the following SQL statements:

```
Level 0: SELECT EMPLID, NAME FROM EMP_DET ORDER BY EMPLID
Level 1: SELECT EMPLID, ADDRESS FROM EMP_ADDRESS ORDER BY EMPLID
```

In the previous SQL statements, every SQL statement runs once. The data set being generated is created by the associated code that processes child query rows based on a concatenated set of related field values being returned from a parent query.

Note: Not all queries in the Connected Query application can apply the OrderBy processing option.

To use the OrderBy processing option, each query with the OrderBy processing turned on should meet the following requirements:

1. Parent and child queries must have one-to-many relationships.

Every row of the related field values of the parent query can correspond to *none*, *one*, or *many rows* of child query data with the same set of related field values. Every row of the related field values of the child query can have *only one row* of parent data for the same set of related field values.

For example, query DEPARTMENT is linked to query EMPLOYEE by the related field DEPTID. Each department has one or more employees, and each employee works in a single department, which is a one-to-many relationship. You can use the OrderBy processing option for this structure if DEPARTMENT is a Level 0 query and EMPLOYEE is a child query. However, if query EMPLOYEE is set at Level 0 and query DEPARTMENT is set as a child query, then you cannot use the OrderBy processing option because multiple employees work in a department, and that is a many-to-one relationship.

In another example, a connected query has query JOB and query EMPLOYEE, and these queries are joined by the JOB_ID field. You can use the OrderBy processing option if:

- JOB_ID is assigned to multiple employees and
- Each employee has only one JOB_ID.

However, you cannot use the OrderBy processing option if:

- JOB_ID is assigned to multiple employees and
- Each employee has multiple JOB_ID assignments.

2. All child queries (sibling queries) that have the same parent query must share the same set of related fields.

For example, assume that a connected query has the following structure:

```
DEP_EMP (Level 0)
  EMPL (Level 1)
    EMPL_DETAILS (Level 1)
```

You can use the OrderBy processing option if:

- DEP_EMP query is linked with EMPL query by the EMPL_ID field and

- DEP_EMP query is linked with EMPL_DETAILS query by the EMPL_ID field.

You cannot use the OrderBy processing option if:

- DEP_EMP query is linked with the EMPL query by the EMPL_ID field and
- DEP_EMP query is linked with the DEP_DETAILS query by the DEPTID field.

3. Child queries that constitute a single hierarchy should be joined by the same set of related fields as their parent and any other fields.

For example, assume that a connected query has the following structure:

```
DEP_EMP > EMPL > EMPL_ADDR
```

You can use the OrderBy processing option if:

- DEP_EMP query is linked with the EMPL query by the EMPL_ID field and
- Query EMPL is linked to the EMPL_ADDR query by the related fields EMPL_ID and ADDRESS_ID.

4. Related fields that are identified as parent and child query relationships must follow the same field order in each query.
5. Parent queries on any level should not be restricted to the amount of data they return if the same restrictions do not exist for their child queries.

Note: This rule is not required, but it is highly recommended.

If the parent query limits the number of rows that are returned by any filter (for example, the WHERE clause) in the query and the child query does not use this filter; then Connected Query performance may be less efficient.

If the parent query uses a prompt to limit the amount of data returned, you should add the same prompt to the child query to eliminate extra string processing and improve processing time.

Note: To improve Connected Query performance when creating a connected query, report developers should compare the Connected Query results by running connected queries using the traditional execution algorithm and the OrderBy processing options. It is recommended that Connected Query developer sets the connected query property ExecutionLog to True to analyze the results, and then use the OrderBy processing option only if both processing options return the same number of nodes and improve processing speed.

Setting the SupportsOrderBy Property

To set the SupportsOrderBy property:

1. Select Reporting Tools, Connected Query, Connected Query Manager.
2. Open an existing query and click the Properties button.

3. Select the True option from the Property Value list for the SupportsOrderBy property.
4. Click the OK button to return to the Connected Query Manager page.

The Use 'Order By' processing column is available in the Connected Query Structure section.

Connected Query Manager

Connected Query: PORTALMRUCQUERY [Transformations](#)

Owner ID: PeopleTools Demo [Properties](#)

*Status: Active ☐ Public

Description

Description: PORTAL MRU Connected Query

Comments:

Parent Query Selection

Parent Query: PTPORTALMRU [View Query](#)

Connected Query Structure	Use 'Order By' processing	Field1	Field2
PTPORTALMRU	☒	A.PORTAL_NAME	A.PORTAL_OBJNAME
PTPORTALREG_SEC	☐	A.PORTAL_NAME	A.PORTAL_OBJNAME

[Preview XML](#) Max Rows Fetched for Query: 6

[Save](#) [Cancel](#)

In this example, the Use 'Order By' processing option for the first query PSMENUDEFN is always selected and you cannot modify it. The Use 'Order By' processing options for the following queries become active when you click the query name in the Connected Query Structure column.

If you reopen the Connected Query Property page and set the SupportsOrderBy property to False, then the Use 'Order By' processing column is not available in the Connected Query Manager page. If you later set the SupportsOrderBy property back to True, the system will display the processing option that you previously selected.

Note: The OrderBy processing option is not applied if the connected query is running in the Preview XML mode.

5. Select the appropriate options in the Use 'Order By' processing column.

If the Use 'Order By' processing option is selected for a specific query (for example, PSMENUITEM), then:

- The parent query (in this example, PSMENUDEFN) SQL will be modified by adding the ORDER BY clause. Data returned from the parent query will be ordered using a set of related fields defined to link a child query to its parent. In this example, it is the field A.MENUNAME.
- If the parent query (PSMENUDEFN) has an existing ORDER BY clause defined inside the query definition, it will be removed and replaced with the ORDER BY clause being generated by the processor.
- A single SELECT statement based on a query definition will be issued for a child query (PSMENUITEM) with NO FILTERING based on related field values received for a parent query.

- Output XML data will be written row by row for a child query with a reference to the data that is returned from related fields used for a parent query.

6. Click the Save button.

When the SupportsOrderBy property is set to True and you click the Save button on the Connected Query Manager page, the following validation are performed:

- If all members of the connected query have their related fields defined?

This validation is performed for the CQRuntime with or without the OrderBy processing option.

- If each parent query is already ordered by another child and the OrderBy sequence of the fields is not the same for the different child siblings, this message appears noting the bind variables are being replaced with the run-time values: "User selected field %1 in query %2 conflicts with user selected field %3 used in query %4."
- If all related fields being used in the OrderBy processing option include data type other than NUMBER, CHAR, DATE, DATETIME or TIME, this message appears: "Cannot use 'OrderBy' processing on query %1 as field %2 has unsupported data type."
- If any related field being used in the connected query structure does not exist in the Select List of the correspondent query, this message appears: "Cannot use 'OrderBy' processing on query %1 as related field %2 is not used in query %3 select list."
- If any related field being used in the connected query structure does not exist in the correspondent query, this message appears: "Cannot use 'OrderBy' processing on query %1 as related field %2 does not exist in the query %3."

Note: If an error message appears, the connected query is not saved. You should evaluate the use of the OrderBy processing option on each query or on the connected query, and then save the connected query again.

Using Effective Date Operator in the Connected Query Manager Page

Effective date operator is available in the Connected Query Manager page as a part of the field mapping process. You can select an effective date operator for any of the member queries if a child query has an EFFDT value selected as a related field.

This example shows the Connected Query Manager page and the **Eff Date Operator** (effective date operator) list.

Connected Query Manager

Connected Query **QE_CQ_3PROPS_EFF_DATE**

Transformations

Owner ID

Properties

☒ Public
 *Status **Active**

Description

Parent Query Selection

Parent Query:

View Query

Connected Query Structure	Fields
QE_EMPLOYEE	A.DEPTID
QE_PERS_DATA	
QE_DEPARTMENT_DATA_A	A.DEPTID

Select fields from each Query then click 'Map Fields' button to map.

Map Fields

Parent Query - QE_EMPLOYEE

Child Query - QE_DEPARTMENT_DATA_A

Select	Key	Select a Child Query Field	Format	*Select a Parent Query Field	*Eff Date Operator
☐		A.SETID - SetID	CHAR 5		
☒		A.DEPTID - Department	CHAR 10	A.DEPTID	
☒		A.EFFDT - Effective Date	DATE 10	A.EFFDT	Eff Date =
☐		A.EFF_STATUS - Status as of Effective Date	CHAR 1		
☐		A.DESCR - Description	CHAR 30		
☐		B.SETID - SetID	CHAR 5		
☐		B.TREE_NAME - Tree Name	CHAR 18		
☐		B.TREE_NODE - Tree Node	CHAR 20		

Preview XML

Max Rows Fetched for Query:

Save

Cancel

Note that the effective date operator list:

- Is available only if a selected field has a format of *EFFDT*.
- Is available in the Connected Query Manager but not available in the Connected Query Quick Start.
- Has a default operator—an equal operator—like other fields.
- Need not be saved in the database before you preview the XML of a connected query.

Editing a Connected Query

Use the Connected Query Manager search page (PSCONQRSSRCH) to edit a connected query, copy an existing connected query, delete a connected query, preview results of a connected query, schedule

a connected query to run immediately with results displayed in a separate window, and schedule a connected query to run at the preset time.

Navigation:

Reporting Tools > Connected Query > Connected Query Manager

This example illustrates the fields and controls on the Connected Query Manager search page.

Connected Query Manager

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

[Find an Existing Value](#) | [Add a New Value](#)

Search by: begins with

[Advanced Search](#) Preview - Max Rows for Query:

Search Results:

Connected Query										
Name	Description	Owner	Status	Edit	Copy	Delete	Preview XML	Run To Window	Schedule	Definitional References
CUSTOMERS	Customers	Public	Active	Edit	Copy	Delete	Preview XML	Run To Window	Schedule	Lookup References
ITEMDEFIN	Items	Public	Active	Edit	Copy	Delete	Preview XML	Run To Window	Schedule	Lookup References
PORTALREGISTRY_CQ	Portal Registry	Public	Active	Edit	Copy	Delete	Preview XML	Run To Window	Schedule	Lookup References
PTESCONQRY	Enterprise Scheduler ConQry	Public	Active	Edit	Copy	Delete	Preview XML	Run To Window	Schedule	Lookup References
PTRS_CONQRY	Reporting Search ConQry	Public	Active	Edit	Copy	Delete	Preview XML	Run To Window	Schedule	Lookup References
QE_ALL_CAT_CQ	QE_ALL_CAT_CQ	Public	Active	Edit	Copy	Delete	Preview XML	Run To Window	Schedule	Lookup References

To edit existing connected queries:

1. Access the Connected Query Manager page by selecting **Reporting Tools > Connected Query > Connected Query Manager**.
2. Enter your search criteria and click the **Search** button.
3. In the Connected Query Manager search page, click the **Edit** link on the row with the connected query you want to edit.
4. Optionally, change the connected query structure, edit description fields, and change the connected query status.

Copying a Connected Query

Use the Copy a Connected Query page (PSCONQRSCOPY) to copy a connected query.

Navigation:

1. Select **Reporting Tools > Connected Query > Connected Query Manager**.
2. Click the Copy link for the connected query to copy.

This example illustrates the fields and controls on the Copy Connected Query page.

The screenshot displays the 'Copy Connected Query' page, which is divided into two main sections: 'Source Connected Query' and 'Target Connected Query'.

Source Connected Query:

- Connected Query:** EMPLOYEE_REPORTING_DETAILS
- Status:** Active
- ☒ **Public**
- Description:** Employee Reporting Rollup
- Comments:** Employee Reporting Details based on QE_PERS_DATA tree

Target Connected Query:

- *Connected Query:** EMPL_RPRT_DETAILS_COPY
- *Status:** Active (dropdown menu)
- ☒ **Public**
- Description:** Employee Reporting Rollup
- Comments:** Employee Reporting Details based on QE_PERS_DATA tree

To copy a connected query:

1. Access the Copy Connected Query page by selecting **Reporting Tools > Connected Query > Connected Query Manager**.
2. Enter your selection criteria and click the **Search** button.
3. On the Connected Query Manager page, click the **Copy** link next to the connected query to copy.

To save a copy of the connected query:

1. Change the connected query name in the Target section with a new unique name.
2. Optionally, change ownership, descriptions, or the status of the query.
3. Click the **OK** button.

Deleting a Connected Query

To delete a connected query:

1. Access the Connected Query Manager page by selecting **Reporting Tools > Connected Query > Connected Query Manager**.
2. Click the **Delete** link next to the connected query to delete.

A confirmation message appears asking if you want to delete the existing connected query.

- Click the **OK** button to continue and delete the connected query.

Alternatively, click the **Cancel** button to cancel the deletion and return to the Connected Query Manager page.

This is an example of the delete confirmation message.

You have requested that a definition be deleted. Delete Connected Query: QE_CQ_MSGSET_LT11 ? (241,12)

NOTE: This object could be scheduled to run or referenced by other applications. There is no way to determine all possible usages of the definition you are about to delete.
Select 'OK' to delete the definition or 'Cancel' to leave the definition alone.

Performing Definitional Reference Lookups in Connected Queries

Use the Definitional References to Connected Query page (PSCONQRS_DEFN_REF) to view all PeopleSoft definitional objects that use this particular connected query as the data source. The results show the definition ID, definition type, and definition sub-types if they are available.

These object types are included in the Definitional References to Connected Query page:

- BI Publisher (with the Report Definition or Data Source Definition subtypes)
- PeopleSoft Search Framework

Navigation:

- Select **Reporting Tools > Connected Query > Connected Query Manager**.
- Click the **Search** button.
- Click a **Lookup References** link.

This example illustrates the fields and controls on the Definitional References to Connected Query page.

Definitional References to Connected Query "QE_SRCH_JOB_OPENING_CQY"	
Definitions referencing "QE_SRCH_JOB_OPENING_CQY" Find View All   First  1-6 of 6  Last	
Definition ID	Definition Type
QE_ALL_CAT_CQ_SD2	Search Definition
QE_ALL_CAT_SD_CQ2_REM	Search Definition
QE_SES_PPM	Search Definition
QE_SRCH_JOB_FACET_SORT	Search Definition
QE_SRCH_JOB_FACET_SORT_SD	Search Definition
QE_SRCH_JOB_OPENINGS	Search Definition

Note: The Lookup References feature specifically lists only *definitional* references, which are defined PeopleSoft objects of specific types. This feature is not used to find the references that are not *definitional* references, such as Connected Query API references in PeopleCode or any static text references to that Connected Query name, whether in SQL objects, scripts, PeopleCode, and so on.

The **Lookup References** links are available in the Query Manager search page, Query Viewer search page, Connected Query Manager search page, and Connected Query Viewer search page.

Opening a PeopleSoft Query Using Connected Query Manager

When you open a PeopleSoft query using the Connected Query Manager, the Query Manager component appears in a read-only mode along with a message informing you that no changes are allowed to the query that is opened. The Query Manager that is being opened through the Connected Query Manager is fully functional. It enables you to run a query, view SQL that is being generated by query, view the query structure, view query prompts, view query criteria, and so on, but it doesn't allow you to save any changes for the opened query.

This is an example of the message received when you open a PeopleSoft query in the Connected Query Manager.

No changes allowed in Queries opened via Connected Query application. (241,68)

Note: You can only view the Query definition. You will not be able to modify the Query when Query is opened via Connected Query application you need to modify the Query, please open the Query via Query Manager.

OK

Using Connected Query Viewer

Connected Query Viewer is a read-only version of Connected Query Manager. It enables security administrators to limit users with a role of Connected Query User (permission list PTPT2800) to search for and view connected queries that have a status of *Active*.

Use the Connected Query Viewer page (PSCONQRSSRCH) to view the results of a running connected query: preview the XML, schedule a connected query to run immediately with results displayed in a separate window, or schedule the connected query to run at a later time.

Navigation:

Reporting Tools > Connected Query > Connected Query Viewer

This example illustrates the fields and controls on the Connected Query Viewer page. Definitions for the fields and controls appear following the example.

Connected Query Viewer

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

Search by: begins with

[Advanced Search](#)

Preview - Max Rows for Query:

Search Results:

Connected Query							
Name	Description	Owner	Status	Preview XML	Run To Window	Schedule	Definitional References
CUSTOMERS	Customers	Public	Active	Preview XML	Run To Window	Schedule	Lookup References
ITEMDEFIN	Items	Public	Active	Preview XML	Run To Window	Schedule	Lookup References
PORTALREGISTRY_CQ	Portal Registry	Public	Active	Preview XML	Run To Window	Schedule	Lookup References
PTESCONQRY	Enterprise Scheduler ConQry	Public	Active	Preview XML	Run To Window	Schedule	Lookup References
PTRS_CONQRY	Reporting Search ConQry	Public	Active	Preview XML	Run To Window	Schedule	Lookup References
QE_ALL_CAT_CQ	QE_ALL_CAT_CQ	Public	Active	Preview XML	Run To Window	Schedule	Lookup References

Field or Control	Description
Search	Click to search for a connected query using the basic search function. Combined with only the <i>begins with</i> condition, the basic search enables you to select the following <i>Search by</i> criteria: Connected Query Description, Connected Query Name, Connected Query Status, and Owner.
Advanced Search	Click the Advanced Search link to search for a connected query using the advanced search function. The advanced search enables you to perform a narrower search by using one or more <i>Search by</i> criteria and selections of conditions for each <i>Search by</i> criterion. You can select the following <i>Search by</i> criteria: Connected Query name, Description, Status, Ownership Type, and Case Sensitive Search.
Preview - Max Rows For Query	Enter a number of rows to be returned from each query in a preview mode. You should limit the number of rows that are being returned. The default value is 6. If you enter 0 or clear this text box, no row limits will be imposed for a resulted XML, which can cause a significant delay in getting results; and because the application runs in a synchronized mode using application server, you may get browser time-out or tuxedo time-out errors.

Field or Control	Description
Preview XML	Click a Preview XML link for the selected connected query to view its results in a new browser window. Note: The Preview XML action uses the Application Server to generate and configure XML data, thus you have to wait for XML data to be available. To keep working while system generates and configures XML data, use the Run to Window link, which does not limit number of rows returned from each query. If the connected query has prompts, a prompt window appears after you click the Preview XML button.
Run to Windows	Click a Run To Windows link for the selected connected query to schedule that query to be run immediately using PeopleSoft Process Scheduler, and then view its XML results in a new browser window.
Schedule	From the Connected Query Viewer search results page, click the Schedule link that is associated with the connected query. Connected Query Viewer interacts with PeopleSoft Process Scheduler to enable you to schedule connected queries. You can submit requests to schedule a connected query, check the status of your request using Process Monitor, and view connected query results using Report Manager. See “Understanding Process Monitor” (Process Scheduler), “Viewing the Status of Processes” (Process Scheduler), “Administering Report Manager” (Process Scheduler).
Lookup References	Click this link to display the Definitional References to Connected Query window where you can view all PeopleSoft definitional objects that use this particular connected query as the data source. The results show the definition ID, definition type, and definition sub-types if they are available. See Performing Definitional Reference Lookups in Connected Queries in Using Connected Query Manager.

Related Links

“Running BI Publisher PeopleSoft Query Reports” (BI Publisher for PeopleSoft)

Using Connected Query Scheduler

Use the Schedule Connected Query page (PSCONQRS_RUN_CNTRL) to schedule a connected query to run in the PeopleSoft Process Scheduler.

Navigation:

You can schedule a connected query in three ways:

- Clicking the **Run To Window** link in the Connected Query Manager search page or the Connected Query Viewer search page.
- Clicking the **Schedule** link in the Connected Query Manager search page or the Connected Query Viewer search page.
- Selecting **Reporting Tools > Connected Query > Connected Query Scheduler**.

Connected Query interacts with Application Engine program PSCONQRS to enable you to schedule connected queries. You can search for an existing run control ID or create a new run control ID and schedule a connected query using the Schedule Connected Query page, check the status of your request using the **Process Monitor** link, and view your output using the **Report Manager** link.

This example illustrates the fields and controls on the Schedule Connected Query page. Definitions for the fields and controls appear following the example.

Schedule Connected Query

New Window | Help | Personalize Page

Run Control ID:TEST1

Report Manager

Process Monitor

Run

Connected Query Definition

*Connected QueryDescription

QE_EMPLOYEE_REPORTING_DETAILSQEmployee Reporting Rollup

CQ Temp TBLTemp Table Instances

Update Parameters

Report Parameters

Query Parameters

Query Name	Prompt Name	Prompt Value
QE_DEPARTMENTS_ROLLUP_PERS	TREE_NODE	3

Save

Cancel

Field or Control	Description
Report Manager	Click to access the Report Manager page to view the report content after the output file is posted and the output destination is set to <i>Web</i> or <i>Window</i>. The final output file is posted to the Report Manager repository for web access by authorized users. See “Administering Report Manager” (Process Scheduler).
Process Monitor	Click to access the Process Monitor page and check the progress of your request. See “Understanding Process Monitor” (Process Scheduler), “Viewing the Status of Processes” (Process Scheduler).

Field or Control	Description
Update Parameters	Click to update the runtime prompt values of connected query. See “Submitting Process Requests” (Process Scheduler).
Run	Click to access the Process Scheduler Request page, where you can specify variables, such as where a process runs and in what format the process output is generated. The values for output type and output format appear by default per the report definition and can be changed if the report definition allows it. Note: The Run button in the Schedule Connected Query page functions as the Schedule link in the Connected Query Manager search page.
Connected Query	Enter or search for a connected query. Note: On the Schedule Connected Query page, you cannot modify the connected query name after you save the Run Control ID.
CQ Temp TBL	Enter the name of temporary table. This value indicates whether the search definition uses the connected query as its data source.
Temp Table Instances	Enter the temporary table instance. This value indicates whether the search definition uses the connected query as its data source.

Related Links

Scheduling Queries

“Understanding the Management of PeopleSoft Process Scheduler” (Process Scheduler)

“Running BI Publisher PeopleSoft Query Reports” (BI Publisher for PeopleSoft)

Using Composite Query

Composite Query Overview

Composite Query Overview

Composite Query enables you to combine data from existing queries and then apply filters, aggregates, and so on before presenting the report results, which show the combined data set. Composite Query retrieves multiple levels of related information on existing queries and presents the combined data as a single and flattened query result.

You can create BI Publisher reports with composite query as a Data Source.

See “Creating Data Sources” (BI Publisher for PeopleSoft), “Registering Data Sources” (BI Publisher for PeopleSoft), “Running BI Publisher PeopleSoft Query Reports” (BI Publisher for PeopleSoft).

Using Composite Query, you also have the option to:

- Select the SQL pruning option to remove tables and fields that are not needed based on users’ attribute selections.
- Set the ORDER BY and GROUP BY clauses.
- Set the WHERE clause as a filter over the result set of a composite query.

Note: Fields in the WHERE clause cannot be pruned.

- Prune the base queries at runtime based on the selected output fields, join criteria, filter criteria, and ORDER BY clause.
- View pruned SQL statements for the composite query.
- Run the composite queries using Application Server.
- Reuse a composite query definition.
- Specify join criteria, field dependencies within a query, and field or table pruning options at query design time.

See [Defining Record and Field Dependencies](#).

- Set the result limit by selecting the attributes in the base queries.

Note: Composite queries created based on web services requests are not persisted in the database. The base queries can be the existing queries that were created using Query Manager, Query API, or QAS.

Composite Query Considerations and Limitations

Using Composite Query, note that:

- Composite Query should not be used for returning a large number of rows. The result set returned from a composite query should be 10,000 rows or less at runtime. The time-out limitation to run a composite query is the time-out limitation of the application servers.

Make sure you construct the Join Criteria, Filter Criteria, and aggregations to reduce the amount of data returned by a composite query.

- Composite query does not change the SQL statements or the result sets of existing queries. If users select the **Standard Pruning** option or the **Prune To Select** option, the pruning process removes the selected fields or record from the query's SQL statement if these fields or record are not needed. The **Prune To Select** pruning option can potentially change the result set.
- Relationships between different base queries are expressed by fields, not by expressions or prompts.
- A composite query can have a sibling at any level. However, no relationship exists between siblings other than that they have the same parent. A Cartesian Join between siblings is possible if the key to join parent and children has the one-to-many or many-to-many relationship. This relationship is different from connected queries, where siblings have the implication of performing the UNION clause to the result of the siblings.
- All base queries collect data from the same database. These base queries are joined through the join criteria, which appears in the FROM clause. Join Criteria are combined using the operator AND to avoid a Cartesian product. Join criteria between base queries does not support Right Outer Join or Outer Join.
- Users must specify the field dependencies to ensure correctness of SQL pruning.

The pruning process may produce incorrect SQL statements if the dependencies are incomplete or incorrect.

See [Defining Record and Field Dependencies](#).

- All fields in base queries must have unique names. By default, the table alias and the field name, with a dot (.) in between, are used as the unique field name.
- If a query has the UNION construct, pruning is based on the main SELECT clause.

If a field is removed from the main SELECT clause, it is removed from the UNION clause based on the pruning rules. If a field is selected in the main SELECT clause, it is automatically selected in the UNION clause.

- The Order By clause in the base queries is removed due to the limitation of Microsoft SQL server. If users need to sort the composite query results, they have to use Composite Query Manager to specify the Order By clause for the composite query.
- A composite query does not parse expressions.

To support different database platforms, users must provide expression syntax as MetaSQL. Otherwise, the composite query will not work for other platforms.

- All related language and XLAT translations are performed at the query level.

Security for Composite Query

Users must have the role of Composite Query Developer or permission list PTPT5100 to access the Composite Query component.

Creating Composite Query Definitions

Specifying Composite Query Properties

Use the Specify Composite Query Manager page (PSCPQINFO) to specify composite query properties.

Navigation:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Select the Add a New Value tab to add a new composite query.

This example illustrates the fields and controls on the Specify Composite Query Properties page. Definitions for the fields and controls appear following the example.

Specify Composite Query Properties

Next >

Composite Query Information

*Composite Query Name

EMPL_AND_JOB

*Type

Public

*Status

In Progress

Description

Employee and Job Code

Term	Definition
Composite Query Name	This is a required field. Enter a unique name for the composite query. Note: The name of the composite query cannot be changed after you enter the name into the Specify Composite Query Properties page.

Term	Definition
Type	Select whether the composite query is <i>Private</i> or <i>Public</i>. • <i>Private</i>: Only the user ID that created the composite query can open, run, modify, or delete the composite query. • <i>Public</i>: Any user with access to the base queries used by the composite query can run, modify, or delete the composite query.
Status	Select the status of the composite query. The available options are <i>In Progress</i>, <i>Active</i>, or <i>Inactive</i>. Note: Currently, composite queries do not apply the status logic based on the value set in this field; the status logic will be applied to the composite queries in future PeopleTools releases.
Description	This is an optional field. Enter a description for the composite query.
Next	Click to advance to the Select Base Query page.

Selecting Base Queries

Use the Select Base Query page (PSCPQSELECTQRY) to select one or two base queries for the composite query.

Note: Currently, only queries that do not have runtime prompts can be selected as base queries.

Navigation:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Select the Add a New Value tab.
3. Enter the basic information in the Specify Composite Query Properties page and click the **Next** button.

This example illustrates the fields and controls on the Select Base Query page. Definitions for the fields and controls appear following the example.

Select Base Query

Next >

Composite Query NameEMPL AND_JOB

Base Queries

Query Name 1QE_EMPLOYEE

Query Alias 1EMPLOYEE

Query Name 2QE_JOBCODE

Query Alias 2JOB

Term	Definition
Query Name	At least one query must be selected. The query names cannot be changed after you enter the values into this page and move to the next page.
Query Alias	Enter the query alias name. Note that the query aliases cannot: • Include any space, special character, or database reserved word. • Be changed after you enter the values into this page and move to the next page.
Next	This button is available after you select the name of the first base query. Click this button to advance to the Specify Query Joins page.

Specifying Query Joins

Use the Specify Query Joins page (PSCPQQRYJOINS) to define how selected queries (from the Select Base Query page) should be joined.

Navigation:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Select the Add a New Value tab.
3. Enter the basic information in the Specify Composite Properties page and click the **Next** button.

4. Select two base queries in the Select Base Query page and click the **Next** button.

This example illustrates the fields and controls on the Specify Query Joins page. Definitions for the fields and controls appear following the example.

Specify Query Joins

Next >

Composite Query Name EMPL_AND_JOB

Joins				
Query Alias 1	Query Name 1	*Join to Related Query	Query Alias 2	Query Name 2
EMPLOYEE	QE_EMPLOYEE	Inner Join	JOB	QE_JOBCODE

Query Join Details					
Query Name	*Query Field	*Condition Type	Query Name	*Query Field	
QE_EMPLOYEE	A.QE_JOBCODE	equal to	QE_JOBCODE	A.QE_JOBCODE	+ -

Term	Definition
Joins	This section displays the query names and query alias of the selected queries. You can select a join type from the Join to Related Query drop-down list. The available values are <i>Inner Join</i> and <i>Left Outer Join</i>.
Query Join Details	Use this section to select the query fields and condition type used to join the selected queries. Query Field The first Query Field drop-down list includes the fields that you have selected as the output fields from the first base query. In the previous example, the first base query is QE_EMPLOYEE. Select a query field as a mapping field from the first Query Field drop-down list. Condition Type Select a value from the Condition Type drop-down list to define how the field values are compared. Only the subset of the condition types supported by PSQuery is supported by Composite Query. The available options are <i>equal to</i>, <i>greater than</i>, <i>less than</i>, <i>not greater than</i>, <i>not less than</i>, <i>equal to</i>, and <i>not equal to</i>. Query Field The second Query Field drop-down list includes the fields that you have selected as output fields from the second base query. In the previous example, the second base query is QE_JOBCODE. Select a query field as a mapping field from the second Query Field drop-down list.

<i>Term</i>	<i>Definition</i>
Next	Click to advance to the Select Output Fields page.

Selecting Output Fields

Use the Select Output Fields (PSCPQOUTPUTFIELDS) page to select the output fields for the composite query. This page displays all fields that are available from the base queries that you selected.

Navigation:

1. Select **Reporting Tools > Composite Query > Composite Query Manager**.
2. Select the Add a New Value tab.
3. Enter the basic information in the Specify Composite Properties page and click the **Next** button.
4. Select two base queries in the Select Base Query page and click the **Next** button.
5. Specify query joint and click the **Next** button.

This example illustrates the fields and controls on the Specify Output Fields page. Three fields from the first query, QE_EMPLOYEE, are selected and one field from the second query, QE_JOBCODE, is selected.

Select Output Fields

Next >

Composite Query Name EMPL_AND_JOB_2

Select	Query Name	Query Alias	Query Field Name	Field Format
	QE_EMPLOYEE	EMPLOYEE		
☒		EMPLOYEE	A.EMPLID	Char11
☒		EMPLOYEE	A.EFFDT	Date
☒		EMPLOYEE	A.QE_EMPLOYEE_NAME	Char60
☐		EMPLOYEE	A.QE_FIRST_NAME	Char50
☐		EMPLOYEE	A.QE_LAST_NAME	Char30
☐		EMPLOYEE	A.QE_SOC_SEC_NBR	Char9
☐		EMPLOYEE	A.QE_JOBCODE	Char6
☐		EMPLOYEE	A.DEPTID	Char10
	QE_JOBCODE	JOB		
☒		JOB	A.QE_JOBCODE	Char6
☐		JOB	A.DESCR	Char30

[Select All](#)
[Clear All](#)

Term	Definition
Select	Select the check box to the left of each field that you want to add to the composite query output field list.
Select All	Click this link to select all fields in the queries.
Clear All	Click this link to deselect all fields in the queries.

Note: If the output field of the base query is a drilling URL field or is mapped to the drilling URLs and you add this drilling URL field to the composite query output field list, then you must add all query fields that are used to build the drilling URLs to the composite query output field list.

If the base query includes the drilling URL fields, only the drilling URL fields that have the drilling URL type set to Query, Component, or External are listed in the Select Output Fields page.

Using the Composite Query Manager Page

Use the Composite Query Manager page (PSCPQMAIN) to view and maintain connected queries.

Navigation:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Search for an existing query and click the corresponding **Edit** link.

This example illustrates the fields and controls on the Composite Query Manager page. You can find definitions for the fields and controls later on this page.

Composite Query Name EMPL_AND_JOB_2

Type Public

*Status In Progress

Description Employee and Job Code

Actions

Query Selected

- EMPLOYEE
 - A.EMPLID *
 - A.EFFDT *
 - A.QE_EMPLOYEE_NAME *
 - A.QE_FIRST_NAME
 - A.QE_LAST_NAME
 - A.QE_SOC_SEC_NBR
 - A.QE_JOBCODE
 - A.DEPTID
- JOB
 - A.QE_JOBCODE *
 - A.DESCR

Fields

Description	Field Format	Heading	Order-By	Aggregate	Actions
1 EMPLOYEE."A.EMPLID"	Char11	ID			
2 EMPLOYEE."A.EFFDT"	Date	Eff Date			
3 EMPLOYEE."A.QE_EMPLOYEE_NAME"	Char60	Name			
4 JOB."A.QE_JOBCODE"	Char6	JobCode			

Term	Definition
Status	Select the status of the composite query. The available options are <i>In Progress</i>, <i>Active</i>, or <i>Inactive</i>. Note: Currently, composite queries do not apply the status logic based on the value set in this field, but the status logic will be applied to the composite queries in future PeopleTools releases.
Actions	The available options are: • Add Prompt: Select this option to add additional prompts to the composite query. See Defining Composite Query Prompts. • Add Query: Select this option to join or add additional base queries to the composite query. See Defining Joins in Composite Queries. • Add Expression: Select this option to add additional expressions to the composite query. See Defining Expressions in Composite Queries. • Add Drilling URL: Select this option to add drilling URLs to the composite query. See Defining Drilling URLs in Composite Queries.
Query Selected	This section lists the queries that you have selected using the Select Base Query page.
	Click the Expand icon to expand the list of the fields from the selected query.
	Click the Collapse icon to collapse the list of fields from the selected query.
	The Query Name icon indicates the name of the base query.
	The Query Field icon indicates the name of the fields in the base query.
	The Selected as Output Field icon indicates that this field is already selected as an output field for the composite query. In the previous example, the selected output fields are A.EMPLID, A.EFFDT, A.QE_EMPLOYEE_NAME, and A.QE_JOBCODE.

Term	Definition
	Click the Add to Output Field List icon to add the corresponding field to the output field list for the composite query.
	Click the Menu icon to open the actions menu that is available for the selected query or field. If you click the Menu icon for a query, the available options are: • Remove: Select this option to remove the corresponding query and all of its fields from the output field list. • Select All Fields: Select this option to add all fields of the corresponding query to the output field list. • Deselect All Fields: Select this option to remove all fields of the corresponding query from the output field list. If you click the Menu icon for a field, the available options are: • Add Field: Select this option to add the corresponding field to the output field list. • Add Filter: Select this option to create a filter for the composite query using the corresponding field. See Defining Filters in Composite Queries. Note: If the base query includes drilling URL fields, only the drilling URL fields that have the drilling URL type set to Query, Component, or External are listed in the Query Selected section. If the output field of the base query is a drilling URL field or is mapped to the drilling URLs and you add this drilling URL field to the composite query output field list, then you must add all query fields that are used to build the drilling URLs to the composite query output field list.
Joins	Click this button to display the Joins section and access the Query Join Details page, where you can view, define, and maintain query joins details for the composite query. See Defining Joins in Composite Queries.
Filters	Click this button to display the Filters section, where you can view and maintain filters criteria for the composite query. See Defining Filters in Composite Queries.
Having	Click this button to display the Having section, where you can view and maintain the having criteria for the composite query. See Defining HAVING Criteria in Composite Queries.

<i>Term</i>	<i>Definition</i>
SQL	Click this button to display the SQL section, where you can view the SQL statement that is generated for the composite query. See Viewing SQL in Composite Queries.
	Move the mouse over the Options icon to display the action options, which are: • Properties: Select this option to view the properties of the composite query. • Run/Preview: Select this option to preview the composite query results. See Previewing Composite Query Results and Viewing Composite Query Properties.
Fields	The Fields section displays the output fields of the composite query when you first access the Composite Query Manager page. Use the Fields section to view, define, and maintain the output fields that are selected for the output column results. • Initially, the Heading column displays the headings of the fields using the field headings from the base query. If the field is an expression created within the composite query, then this column displays the heading of the expression. You can use the Edit Field option from the Action icon to edit the headings and field properties. See Editing Field Properties. • Use the Order By column to enter the sort order numbers for the output fields. • Use the Aggregate column to apply aggregate functions to the output fields. See Applying Aggregate Functions in Composite Queries. • Use the Action icon to add the output fields as the filters, edit the fields' unique names and headings, edit the fields' group order, move the output fields up or down, or remove the output fields from the output field list. See Editing Field Properties, Applying Group By Clause in Composite Queries, or Defining Filters in Composite Queries.

Creating a Composite Query Definition

To create a composite query definition:

1. In PeopleSoft PIA, select Reporting Tools, Composite Query, Composite Query Manager.

The Composite Query Manager search page appears.

2. Click the **Add a New Value** link.

The Specify Composite Query Properties page appears.

3. Enter the composite query name, type, status, and description.

Note: The composite query name must be unique. Values in the **Type** and **Status** fields are required.

4. Click the **Next** button.

The Select Base Query page appears.

5. Select one or two base queries that are used for the composite query.

Note: Queries with runtime prompts cannot be used as base queries for a composite query.

This example illustrates the fields and controls on the Select Base Query page. The first base query is QE_EMPLOYEE, with the alias set to EMPLOYEE. The second base query is QE_JOBCODE, with the alias set to JOB.

6. Click the **Next** button.

If you select two base queries using the Select Base Query page, the Specify Query Joins page appears, listing the selected queries.

7. Use the Specify Query Joins page to specify query join details.
 - a. Select a join type in the **Join to Related Query** drop-down list.

The available options are *Inner Join* and *Left Outer Join*.

In this example, select the *Inner Join* option.

- b. In the Query Join Details section, note that the first **Query Field** drop-down list displays the fields that you have selected as output fields from the first base query. The second **Query Field** drop-down list displays the fields that you have selected as output fields from the second base query.

In this example, the first base query is QE_EMPLOYEE and the second base query is QE_JOBCODE.

- c. Select a query field as a mapping field from the first **Query Field** drop-down list.

In this example, select A.QE_JOBCODE.

- d. Select a condition type from the **Condition Type** drop-down list.

Condition type defines how the field values are compared. The available options are *equal to*, *greater than*, *less than*, *not greater than*, *not less than*, *equal to*, and *not equal to*.

- e. Select a query field as a mapping field from the second **Query Field** drop-down list.

In this example, select A.QE_JOBCODE.

This example illustrates the fields and controls on the Specify Query Joins page listing the selected queries and the join details.

Specify Query Joins

Next >

Composite Query Name EMPL_AND_JOB

Joins				
Query Alias 1	Query Name 1	*Join to Related Query	Query Alias 2	Query Name 2
EMPLOYEE	QE_EMPLOYEE	Inner Join	JOB	QE_JOBCODE

Query Join Details					
Query Name	*Query Field	*Condition Type	Query Name	*Query Field	
QE_EMPLOYEE	A.QE_JOBCODE	equal to	QE_JOBCODE	A.QE_JOBCODE	+ -

8. Click the **Next** button.

The Select Output Fields page appears listing all fields from the selected base queries.

9. Select the output fields for the composite query.

This example illustrates the selections on the Select Output Fields page. The A.EMPLID, A.EFFDT, and A.QE_EMPLOYEE_NAME fields are selected from the QE_EMPLOYEE query. The A.QE_JOBCODE field is selected from the QE_JOBCODE query.

Select Output Fields

Next >

Composite Query Name EMPL_AND_JOB_2

Fields				
	Query Name	Query Alias	Query Field Name	Field Format
	QE_EMPLOYEE	EMPLOYEE		
☒		EMPLOYEE	A.EMPLID	Char11
☒		EMPLOYEE	A.EFFDT	Date
☒		EMPLOYEE	A.QE_EMPLOYEE_NAME	Char60
☐		EMPLOYEE	A.QE_FIRST_NAME	Char50
☐		EMPLOYEE	A.QE_LAST_NAME	Char30
☐		EMPLOYEE	A.QE_SOC_SEC_NBR	Char9
☐		EMPLOYEE	A.QE_JOBCODE	Char6
☐		EMPLOYEE	A.DEPTID	Char10
	QE_JOBCODE	JOB		
☒		JOB	A.QE_JOBCODE	Char6
☐		JOB	A.DESCR	Char30

[Select All](#)
[Clear All](#)

10. Click the **Next** button.

The Query Composite Manager page appears and displays basic Composite Query definitions that you have defined for the composite query.

11. Click the **Save** button.

This example illustrates the EMPL_AND_JOB composite query in the Query Composite Manager page. The Query Selected section displays the EMPLOYEE and JOB as the base queries. The Fields section lists the selected output fields. The A.EMPLID, A.EFFDT, and A.QE_EMPLOYEE_NAME fields are from the EMPLOYEE query. The A.QE_JOBCODE field is from the JOB query.

Composite Query Name EMPL_AND_JOB_2

Type Public

*Status In Progress

Description Employee and Job Code

Actions

Query Selected

EMPLOYEE

JOB

Fields

Description	Field Format	Heading	Order-By	Aggregate	Actions
1 EMPLOYEE."A.EMPLID"	Char11	ID			
2 EMPLOYEE."A.EFFDT"	Date	Eff Date			
3 EMPLOYEE."A.QE_EMPLOYEE_NAME"	Char60	Name			
4 JOB."A.QE_JOBCODE"	Char6	JobCode			

Defining Composite Query Prompts

Page Used to Define Composite Query Prompts

Use the Composite Query Manager page - Prompts section and the Edit Prompt Properties page (PSCPQPROMPT_SEC) to add additional prompts to the composite query.

Navigation:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Open an existing composite query or create a new one.
3. In the Composite Query Manager page, click the **Actions** link and select the **Add Prompt** option.

This example illustrates the fields and controls on the Composite Query Manager page. The Prompts section lists the defined prompts for the current composite query. In the Prompts section, two options are available from the **Action** icon: select the **Edit** option to edit the current prompt properties and select the **Remove** option to delete the current prompt.

Composite Query Name EMPL_AND_JOB_2

Type Public

*Status In Progress

Description Employee and Job Code

Actions

Query Selected

EMPLOYEE

JOB

Prompts

:1 = JOBCODE

:2 = EMPLID

Fields

Description	Field Format	Heading	Order-By	Aggregate	Actions
1 EMPLOYEE."A.EMPLID"	Char11	ID			
2 EMPLOYEE."A.EFFDT"	Date	Eff Date			
3 EMPLOYEE."A.QE_EMPLOYEE_NAME"	Char60	Name			
4 JOB."A.QE_JOBCODE"	Char6	JobCode			

This example illustrates the fields and controls on the Edit Prompt Properties page. Definitions for the fields and controls appear following the example.

Term	Definition
Field Type, Format, and Length	The values of these fields appear by default from the field definition in the database.
Decimals	Defines the number of decimal places that are allowed.
Edit Type	Select the appropriate type for the selected field: Prompt Table: You search and select only values that exist in a prompt table. If you select Prompt Table as the edit type, the correct record should appear by default. However, you should verify that the Prompt Table field displays the record that stores the values that you want users to see. Translate Table: You select from a list of values specific to this field that exist in the Translate table. Yes/No Table: You select or deselect check boxes. No Table Edit: You enter any value. No validation exists on this edit type.

<i>Term</i>	<i>Definition</i>
Heading Type	Select a heading type for the prompt from the following values: • Text: The prompt heading is the free text that you entered in the text box. Note: For consistency and globalization, manually entering text is discouraged. • RFT Short: The prompt heading is the short name from the record definition. • RFT Long: 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 the Text option from the Heading Type drop-down list and then enter the new label in the Heading Text box.
Unique Prompt Name	A default value that Query Manager generates for globalization. Only base language users can set this value to identify a unique query prompt parameter.
Prompt Table	If the edit type is Prompt Table, you can select a prompt table to use. If the edit type is Translate Table, the value in the drop-down list determines the values used. Composite 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.

Note: The Edit Prompt Properties page in Composite Query Manager is similar to the Edit Prompt Properties page in Query Manager. See [Defining Prompts](#).

Adding Prompts to Composite Queries

To add prompts to composite queries:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Open an existing composite query or create a new one.
3. In the Composite Query Manager page, click the **Actions** menu link and select the **Add Prompt** option.

The Edit Prompt Properties page appears.

4. Specify prompt properties such as field name, heading type, unique prompt name, edit type, and so on.
5. Click the **OK** button to create the prompt.

The Composite Query Manager page reappears. The newly created prompt is added to the Prompts section.

6. Optionally, use the **Action** icons in the Prompts section to add the prompts as output fields, edit the prompts, or remove the prompts from the composite query.

Editing Prompts in Composite Queries

To edit prompts in composite queries:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Open an existing composite query.
3. In the Composite Query Manager page - Prompts section, click the **Actions** icon for the prompt that you want to edit and select the **Edit** option.

The Edit Prompt Properties page appears.

4. Specify prompt properties such as field name, heading type, unique prompt name, edit type, and so on.
5. Click the **OK** button to accept the changes.

The Composite Query Manager page reappears listing the modified prompt.

Removing Prompts from Composite Queries

To remove prompts from composite queries:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Open an existing composite query.
3. In the Composite Query Manager page - Prompts section, click the **Actions** icon for the prompt that you want to remove from the composite query and select the **Remove** option.

A warning message appears.

4. Click the **OK** button.

The Composite Query Manager page reappears. The selected prompt is removed from the Prompts section.

Note: Prompts are not removed from the composite query if they are used as part of the composite query. For example, you cannot remove the prompt from the composite query if that prompt is used as a filter in the composite query.

Defining Joins in Composite Queries

Pages Used to Define Joins in Composite Queries

Use the Composite Query Manager page - Joins section, Look Up Query page (PSXPSRCHQRY_SEC), Query Selected page (PSCPQ_ADD_JOIN_SEC), and Query Join Details page (PSCPQJOINDTL_SEC) to view, define, and maintain query joins details for the composite query.

Navigation:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Open an existing composite query or create a new one.
3. In the Composite Query Manager page, click the **Actions** menu link and select the **Add Field** option.
4. In the Look Up Query page, search and select a query from the list of available queries.
5. In the Query Selected page, define the join type and join field, and click the **OK** button.

The Query Join Details page appears, listing the join details for the composite query.

This example illustrates the fields and controls on the Composite Query Manager page – Joins section.

Composite Query Name: EMPL_AND_JOB
 Type: Public
 *Status: In Progress
 Description: Employee and Job Code

Actions

Query Selected

- EMPLOYEE
- JOB
- DEPT

Prompts

- :1 = JOBCODE
- :2 = EMPLID

Fields Joins Filters Having SQL

Query Alias 1	Query Name 1	Join Type	Query Alias 2	Query Name 2
EMPLOYEE	QE_EMPLOYEE	Inner Join	JOB	QE_JOBCODE
EMPLOYEE	QE_EMPLOYEE	Inner Join	DEPT	QE_EMPDEPT

This example illustrates the fields and controls on the Look Up Query page.

Look Up Query

* Search by: Query Name

begins with QE_EM

Lookup

Cancel

Advanced Lookup

Search Results

Query

Personalize | Find | View All |

First 1-6 of 6 Last

Query Name	Description	Owner
QE_EMPDEPT	Employee Count By Department	Public
QE_EMPLOYEE	QE Employee Info	Public
QE_EMPLOYEE FROM PERSDATA A	Employee_From_PersData_tree	Public
QE_EMPLOYEE FROM PERSDATA TREE	Employee_From_PersData_tree	Public
QE_EMPLOYEE SORTED	QE Employee Info	Public
QE_EMP_DESTINATION	QE Employee Info	Public

This example illustrates the fields and controls on the Query Selected page.

Query Selected

Query Name QE_EMPDEPT

Query Alias DEPT

Join Type

☒ Inner Join
 ☐ Left Outer Join

Select a query to create the join with

Personalize | Find |

First 1-2 of 2 Last

	Query Alias	Query Name
☒	EMPLOYEE	QE_EMPLOYEE
☐	JOB	QE_JOBCODE

This example illustrates the fields and controls on the Query Join Details page.

Query Join Details

Query Name 1 QE_EMPLOYEE

*Join Type Inner Join

Query Name 2 QE_EMPDEPT

	Query Alias 1	Query Name 1	*Query Field	*Condition Type	Query Alias 2	Query Name 2	*Child Query Field Name	
1	EMPLOYEE	QE_EMPLOYEE	A.QE_JOBCODE	equal to	DEPT	QE_EMPDEPT	A.QE_JOBCODE	

Joining Additional Base Queries

To join additional base queries for composite queries:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Open an existing composite query.
3. In the Composite Query Manager page, click the **Actions** menu link and select the **Add Query** option.

The Look Up Query page appears.

4. Select a base query to join in the composite query.
5. In the Query Selected page:
 - a. Enter a unique query alias for the query.
 - b. Define the join type using the Join Type section.
 - c. Select a query to create the join.
 - d. Click the **OK** button.

The Query Join Details page appears, listing the join values that you defined.

6. Confirm the join values and click the **OK** button.

The Composite Query Manager page reappears, listing the newly added base query in the Query Selected section.

7. Click the **Joins** button.

The Joins section appears, listing the newly added join.

Editing Joins in Composite Queries

To edit joins in composite queries:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Search for and open an existing composite query.
3. In the Composite Query Manager page, click the **Joins** button.

The Joins section appears.

4. Click a link in the **Join Type** column for the join that you want to edit.

The Query Join Details page appears, listing the previously defined join values.

5. Modify the join details and click the **OK** button.

The Composite Query Manager page reappears, listing the modified join details.

Defining Expressions in Composite Queries

Page Used to Define Expressions in Composite Queries

Use the Edit Expression Properties page (PSCPQEXPR_SEC) and the Composite Query Manager page - Expressions section to view, add, and maintain expressions in the composite queries.

Navigation:

- 1. Select Reporting Tools, Composite Query, Composite Query Manager.
- 2. Create a new composite query or open an existing one.
- 3. In the Composite Query Manager page, click the **Actions** menu link and select the **Add Expression** option.

This example illustrates the fields and controls on the Edit Expression Properties page. Definitions for the fields and controls appear following the example.

Edit Expression Properties

*Expression Type

Character

Length

5

Decimals

Expression Text

%Upper(%Substring(EMPLOYEE."A.QE_EMPLOYEE_NAME",
7,5))

Add Field

OK

Cancel

Field or Control	Description
Expression Type	Select an appropriate data type. - If you select the <i>Character</i> option, enter the maximum length of the expression result in the Length field. - If you select the <i>Number</i> or Signed Number option, enter the total number of digits in the Length field and the number of digits after the decimal point in the Decimal field.
Length	Enter the length of the expression type.

Field or Control	Description
Expression Text	Enter the expression text to perform a calculation, for example, <i>SUM(A.COST)</i> or <i>%Upper(%Substring(EMPLOYEE."A.QE_EMPLOYEE_NAME",7,5))</i> .
Add Field	Click this link to access the Select a Field page (CPQ_QUERY_FIELD), where you can select and add a composite query output field or a query field to the composite query expression.

Note: The Edit Expression Properties page in Composite Query Manager is similar to the Edit Expression Properties page in Query Manager. See [Defining Expressions](#).

This example illustrates the fields and controls on the Composite Query Manager page. The Expressions section lists the defined expressions for the current composite query.

The screenshot shows the Composite Query Manager interface. At the top, the Composite Query Name is 'EMPL_AND_JOB_2', Type is 'Public', Status is 'In Progress', and Description is 'Employee and Job Code'. Below this are tabs for Actions, Fields, Joins, Filters, Having, and SQL. The 'Expressions' section is expanded, showing a list of expressions: EMPLOYEE, JOB, DEPT, and an expression '%Upper(%Substring(EMPLOYEE."A...'. The 'Fields' section is also visible, showing a table with columns: Description, Field Format, Heading, Order-By, Aggregate, and Actions. The table contains four rows of fields: 1. EMPLOYEE."A.EMPLID" (Char11, ID), 2. EMPLOYEE."A.EFFDT" (Date, Eff Date), 3. EMPLOYEE."A.QE_EMPLOYEE_NAME" (Char60, Name), and 4. JOB."A.QE_JOBCODE" (Char6, JobCode).

In the Composite Query Manager page, Expressions section, four actions are available from the **Action** icon:

- **Add Field:** Use this option to add the expressions to the output field list in the Fields section.
- **Add Filter:** Use this option to add the expression as a left operand in filter criteria.
- **Edit:** Use this option to edit the current expression properties.
- **Remove:** Use this option to delete the expression from the composite query.

Derived Formula Using Expressions in Composite Query

Composite Query can expand the aggregate of fields in expressions using the aggregate function that is specified for the selected fields.

If a composite query has field F1, field F2, and expression field $F1 + F2$, then Composite Query expands the expression field as $SUM(F1) + AVG(F2)$ when field F1 has aggregate function SUM and field F2 has aggregate function AVG. Instead of users specifying the field names as shown in SQL to satisfy this requirement, Composite Query can parse the expression for the fields using the following syntax: `# { <QueryAlias> . <QueryUniqueFieldName> }`.

To display distinct output results that do not list the same field more than once, add the column number to the previous syntax: `#{<QueryAlias>.<QueryUniqueFieldName>:<column number>}`.

Examples of using the previous syntax are:

- `#{Q1.A.SALARY}`
- `#{Q2.SET ID}`
- `#{Q2.SET ID:3}`

Note that:

- The column number is optional.

If you do not specify the column number, then Composite Query uses the first field that matches the field name to check if an aggregate function is defined for that field. If so, Composite Query uses the aggregate function to expand the field in an expression. You are not able to use the field without aggregation if it is included in the output field list.

- If you create the composite query using Composite Query Manager, you should remove the expression field that has a derived aggregate from the Group By clause.

Otherwise, the SQL will not generate the correct Group By clause.

- If you modify the composite query using API, you must set the GroupByNumber property of all fields to ensure that the correct Group By number is used for all output fields.
- If you do not want the derived aggregate for a field in expression, specify zero for the column; for example, `#{Q2.SET ID:0}`.

Adding Expressions to Composite Queries

To add new expressions to composite queries:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Open an existing composite query or create a new one.
3. In the Composite Query Manager page, click the **Actions** menu link and select the **Add Expression** option.

The Edit Expression Properties page appears.

4. Specify expression properties such as expression type, length, decimals, and text.
5. Click the **OK** button to create the new expression.

The Composite Query Manager page reappears. The newly created expression is added to the Expressions section.

6. Optionally, use the **Action** icon in the Expressions section to add the expressions as the output fields, edit the current expressions, or remove the current expressions from the composite query.

Editing Expressions in Composite Queries

To edit expressions in composite queries:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Open an existing composite query.
3. In the Composite Query Manager page - Expressions section, click the **Actions** icon for the expression that you want to edit.
4. Select the **Edit** option.

The Edit Expression Properties page appears.

5. Specify expression properties such as expression type, length, decimals, and text.
6. Click the **OK** button to accept the changes.

The Composite Query Manager page reappears displaying the modified expression based on your selections.

Removing Expressions from Composite Queries

To remove expressions from composite queries:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Search for and open an existing composite query.
3. In the Composite Query Manager page - Expressions section, click the **Actions** icon for the expression that you want to remove from the composite query.
4. Select the **Remove** option.

A warning message appears.

5. Click the **OK** button.

The Composite Query Manager page reappears. The selected expression is removed from the Expression section.

Note: Expressions are not removed from the composite query if they are used in the output field list or filter list.

Adding Expressions to the Output Field List

To add expressions to the output field list:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Open an existing composite query or create a new one.
3. In the Composite Query Manager page - Expressions section, click the **Actions** icon for the expression that you want to add to the output field list.

4. Select the **Add Field** option.

The expression is added to the Fields section, which displays a list of all output fields.

In this examples, expression `%Upper(%Substring(EMPLOYEE.'A.QE_EMPLOYEE_NAME",7,5))` is added to the Fields section.

Composite Query Name: EMPL_AND_JOB_2
 Type: Public
 *Status: In Progress
 Description: Employee and Job Code

Actions: Query Selected (EMPLOYEE, JOB, DEPT), Prompts, Expressions (%Upper(%Substring(EMPLOYEE.'A.QE_EMPLOYEE_NAME",7,5)))

Description	Field Format	Heading	Order-By	Aggregate	Actions
1 EMPLOYEE."A.EMPLID"	Char11	ID			
2 EMPLOYEE."A.EFFDT"	Date	Eff Date			
3 EMPLOYEE."A.QE_EMPLOYEE_NAME"	Char60	Name			
4 JOB."A.QE_JOBCODE"	Char6	JobCode			
5 %Upper(%Substring(EMPLOYEE."A.QE_EMPLOYEE_NAME",7,5))	Char5	EXPR1_5_1			

Defining Drilling URLs in Composite Queries

Page Used to Define Drilling URLs in Composite Queries

You can define drilling URLs for composite queries using Composite Query Manager. Depending on the drilling URL type you select, different pages and fields are available for you to build drilling URLs for the composite queries.

This example illustrates the fields and controls on the Composite Query Manager page. The Drilling URL section lists the defined drilling URLs for the current composite query. The Fields section lists the drilling URLs that are used as separate columns in the output results.

Composite Query Name: CPO_DRILLINGURL_COMPONENT
 Type: Public
 *Status: Active
 Description: Component drilling URL

Actions: Query Selected (Q1_EMPLOYEE, Q2_DEPARTMENT_DATA, Q3_JOBCODE), Drilling URL (Query - QE_EMP_DESTINATION, Component - QE_DEPT_TBL, External - http://www.cnn.com)

Description	Field Format	Heading	Order-By	Sort	Aggregate	Actions
1 Q1_EMPLOYEE."A.EMPLID"	Char11	ID	1	Asc		
2 Q1_EMPLOYEE."A.QE_EMPLOYEE_NAME"	Char60	Name				
3 Q1_EMPLOYEE."A.QE_JOBCODE"	Char6	JobCode				
4 Q3_JOBCODE."A.DESCR"	Char30	Descr				
5 Q2_DEPARTMENT_DATA."A.DEPTID"	Char10	Dept				
6 Q2_DEPARTMENT_DATA."A.DESCR"	Char30	Descr				
7 Q2_DEPARTMENT_DATA."A.SETID"	Char5	SetID				
8 Component - QE_DEPT_TBL	URL	component #1				
9 Query - QE_EMP_DESTINATION	URL	URL1_9_1				

Selecting Drilling URL Type for Composite Queries

Use the Select Drilling URL Type page (PSCPQURLOPTIONS) to add and select a drilling URL type. The available options are Query, Component, and External.

Navigation:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Create a new composite query or open an existing one.
3. In the Composite Query Manager page, click the Actions menu link and select the Add Drilling URL option.

This example illustrates the Select Drilling URL Type page. Definitions for the fields and controls appear following the example.

Field or Control	Description
Query	Select this option and click the OK button to access the Drilling URL Details – Select a Query page, where you can select a query to build the drilling URLs in a query URL format.
Component	Select this option and click the OK button to access the Drilling URL Details – Select a Component page, where you can select a component to build the drilling URLs in a component URL format.
External	Select this option and click the OK button to access the Drilling URL Details – External URL page, where you can enter an external URL to build the drilling URLs in an external URL format.

Defining Query Drilling URLs for Composite Queries

Use the Drilling URL Details – Select a Query page (PSCPQURL_SEC) to define the query drilling URLs in the composite queries.

Navigation:

1. Select Reporting Tools, Composite Query, Composite Query Manager.

2. Create a new composite query or open an existing one.
3. In the Composite Query Manager page, click the **Actions** menu link and select the **Add Drilling URL** option.
4. In the Select Drilling URL Type page, select the **Query** option and click the **OK** button.

This example illustrates the fields and controls on the Drilling URL Details – Select a Query page. Definitions for the fields and controls appear following the example.

Drilling URL details

Select a Query

Portal Name

Node Name

Use psc: ☐

Query Name

Format

URL Keys Find | First 1 of 1 Last

Prompt Name	Prompt Value	Field Lookup
BIND1	%Q2_DEPARTMENT_DATA.A.DEPTID%	

Map Hyperlink to Output Column(s) Find | First 1-6 of 6 Last

Select	Output Field
☒	Q1_EMPLOYEE.A.EMPLID
☐	Q1_EMPLOYEE.A.QE_EMPLOYEE_NAME
☐	Q1_EMPLOYEE.A.QE_JOBCODE
☐	Q3_JOBCODE.A.DESCR
☒	Q2_DEPARTMENT_DATA.A.DEPTID

Append Selected Field(s) to URL Find | First 1-6 of 6 Last

Select	Output Field	Order By
☐	Q1_EMPLOYEE.A.EMPLID	
☐	Q1_EMPLOYEE.A.QE_EMPLOYEE_NAME	
☐	Q1_EMPLOYEE.A.QE_JOBCODE	
☐	Q3_JOBCODE.A.DESCR	
☐	Q2_DEPARTMENT_DATA.A.DEPTID	

Field or Control	Description
Portal Name	Optionally, enter or select a portal that is used to build drilling URLs at report runtime. Note: If the Portal Name field has no value, Composite Query uses value %PORTAL to form a drilling URL at report runtime.
Node Name	Optionally, enter or select a node that is used to build drilling URLs at report runtime. Note: If the Node Name field has no value, Composite Query uses value %NODE to form a drilling URL at report runtime.
Use psc (content servlet)	Define the content type that is used to build drilling URLs. • Select this check box to use the content servlet (psc) type. • Deselect this check box to use the portal service (psp) type. By default, this check box is deselected.
Query Name	Type a query name in the field or click the query lookup icon to search for an existing query.
Format	Select the format of report results that will be generated from the drilling URLs. Available options are HTM, XLS, and XML (XMLP format).
URL Keys	The URL Keys section is available only after you define the value in the Query Name field. Use this section to define the mapping value between the drilling URL output component search keys and the drilling URL source query result column fields. Enter a valid prompt output value or use the Field Lookup icon to select the prompt output values from the list of available values.
Map Hyperlink to Output Column(s)	Note: This step is required for the drilling URLs to be available in a composite query results page. Select the output columns to form the mapping between the drilling URLs and the selected output column.

Field or Control	Description
Append Selected Field(s) to URL	Use this section to select the output columns to append to the drilling URLs and to define the order of the appended value pair in the URLs. You can define multiple drilling URLs in a composite query, but each output field can only bind with one URL.
OK	Click to finish defining the query drilling URL for the composite query and to return to the Composite Query Manager page.

Defining Component Drilling URLs for Composite Queries

Use the Drilling URL Details – Select a Component page to build the component drilling URLs for composite queries.

Navigation:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Create a new composite query or open an existing one.
3. In the Composite Query Manager page, click the **Actions** menu link and select the **Add Drilling URL** option.
4. In the Select Drilling URL Type page, select the **Component** option and click the **OK** button.

This example illustrates the fields and controls on the Drilling URL Details – Select a Component page. Definitions for the fields and controls appear following the example.

Drilling URL details

Select a Component

Portal Name

Node Name

Use psc: ☐

Content Reference

Menu Name

Market

Component

Page

Menu Action

URL Keys Find | First 1-2 of 2 Last

Component Key	Component Key Value	Field Lookup
DEPTID	%Q2_DEPARTMENT_DATA.A.DEPTID%	
SETID	%Q2_DEPARTMENT_DATA.A.SETID%	

Map Hyperlink to Output Column(s) Find | First 1-9 of 9 Last

Select	Output Field
☐	Q1_EMPLOYEE.A.EMPLID
☐	Q1_EMPLOYEE.A.QE_EMPLOYEE_NAME
☐	Q1_EMPLOYEE.A.QE_JOBCODE
☐	Q3_JOBCODE.A.DESCR
☐	Q2_DEPARTMENT_DATA.A.DEPTID

Append Selected Field(s) to URL Find | First 1-9 of 9 Last

Select	Output Field	Order By
☐	Q1_EMPLOYEE.A.EMPLID	
☐	Q1_EMPLOYEE.A.QE_EMPLOYEE_NAME	
☐	Q1_EMPLOYEE.A.QE_JOBCODE	
☐	Q3_JOBCODE.A.DESCR	
☐	Q2_DEPARTMENT_DATA.A.DEPTID	

Note: Most fields in this page are similar to the ones described in the previous section, Defining Query Drilling URLs for Composite Queries. The following table lists and describes only the fields that are related to the component drilling URLs.

Field or Control	Description
Content Reference	Enter the name of a content reference or use the search icon to select a content reference from an existing list. Note: The values of the Menu Name, Market, and Component fields are populated if you select a content reference using the search icon.
Menu Name	Optionally, enter a menu name or click the lookup icon and select a menu name from an existing list.
Market	Optionally, enter a market code or click the lookup icon and select a market code from an existing list.
Component	Optionally, enter a component name or click the lookup icon and select a component name from an existing list.
Page	Enter a page name or click the lookup icon and select a page name from an existing list.

Field or Control	Description
Menu Action	Select an action type to associate with the component. When you run the composite query, the component drilling URL expands with correct action mode within the URL. For different component actions, the drilling URL will be constructed differently. When you click the component drilling URL from the composite query results, it opens the target component with the correct action mode. The available menu actions are: • Add The URL will include Action=A. Clicking the URL opens the target component at the Add a New Value page. • Correction The URL will include Action=C. Clicking the URL opens the target component at the Find an Existing Value page with the Correct History option selected by default. • Update The URL will include Action=U. Clicking the URL opens the target component at the Find an Existing Value page. • Update All The URL will include Action=L. Clicking the URL opens the target component at the Find an Existing Value page with the Include History option selected by default. Note: The Menu Action lists the actions that were granted to the selected component when the component was created using Application Designer. If you have defined mapping between query result columns and all of the component search key fields, then clicking the component drilling URL bypasses the search page and open the main page directly.

Defining External Drilling URLs for Composite Queries

Use the Drilling URL Details – Enter an External URL page to build the external drilling URLs for composite queries.

Navigation:

1. Select Reporting Tools, Composite Query, Composite Query Manager.

2. Create a new composite query or open an existing one.
3. In the Composite Query Manager page, click the **Actions** menu link and select the **Add Drilling URL** option.
4. In the Select Drilling URL Type page, select the **External** option and click the **OK** button.

This example illustrates the fields and controls on the Drilling URL Details – External URL page. Use the **URL** field to enter the value of the external URL. Note that the **URL** field has no format restriction.

Drilling URL details

Enter an External URL

Portal Name

Node Name

URL

Map Hyperlink to Output Column(s) Find |  First 1-10 of 10 Last

Select	Output Field
☐	Q1_EMPLOYEE.A.EMPLID
☐	Q1_EMPLOYEE.A.QE_EMPLOYEE_NAME
☐	Q1_EMPLOYEE.A.QE_JOBCODE
☐	Q3_JOBCODE.A.DESCR
☐	Q2_DEPARTMENT_DATA.A.DEPTID

Append Selected Field(s) to URL Find |  First 1-10 of 10 Last

Select	Output Field	Order By
☐	Q1_EMPLOYEE.A.EMPLID	
☐	Q1_EMPLOYEE.A.QE_EMPLOYEE_NAME	
☐	Q1_EMPLOYEE.A.QE_JOBCODE	
☐	Q3_JOBCODE.A.DESCR	
☐	Q2_DEPARTMENT_DATA.A.DEPTID	

Note: Most fields in this page are similar to the ones described in the previous section, Defining Query Drilling URLs for Composite Queries.

Adding Defined Drilling URLs to the Output Field List

To add the defined drilling URLs to the output fields list in a composite query:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Open an existing composite query.

The Drilling URLs section on the Composite Query Manager page lists the defined drilling URLs, if any.

3. In the Composite Query Manager page, Drilling URL section, click the **Menu** icon for the drilling URL that you want to add to the output field list.
4. Select the **Add Field** option.

The drilling URL is added to the Fields section, which displays a list of all output fields.

5. Save the composite query.

Editing Drilling URLs in Composite Queries

To edit the drilling URLs in a composite query:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Open an existing composite query.
3. In the Composite Query Manager page, Drilling URL section, click the **Menu** icon for the drilling URL that you want to edit.
4. Select the **Edit** option.

The Drilling URL Details page appears, displaying the fields and sections based on the drilling URL type of the selected drilling URL.

5. Specify the drilling URL properties.
6. Click the **OK** button to accept the changes.

The Composite Query Manager page reappears, displaying the modified drilling URL based on your selections.

7. Save the composite query.

Removing Drilling URLs From the Composite Queries

To remove the drilling URLs from the composite query:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Open an existing composite query.
3. In the Composite Query Manager page, Drilling URL section, click the **Menu** icon for the drilling URL that you want to remove from the composite query.
4. Select the **Remove** option.

The selected drilling URL is removed from the Drilling URL section.

5. Save the composite query.

Defining Filters in Composite Queries

Page Used to Define Filters in Composite Queries

Use the Composite Query Manager page - Filters section and the Add / Edit Filter page (PSCPQFILTERDTL_SEC) to view, define, and maintain query filters for the selected output fields in the composite queries.

Navigation:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Create a new composite query or open an existing one.
3. In the Composite Query Manager page - Fields section, click the **Actions** icon and select the **Add Filter** option from the **Action** list.

This example illustrates the fields and controls on the Composite Query Manager page - Filters section, including a list of filters that is defined for the composite query. You can use the **Action** icons in the Filters section to edit filters or remove filters from the composite query.

Fields	Joins	Filters	Having	SQL	
Filters					
Find First 1-3 of 3 Last					
Logical	Expression1	Condition Type	Expression 2	Actions	
	JOB."AQE_JOBCODE"	equal to	EMPLOYEE."AQE_JOBCODE"		
AND	EMPLOYEE."AQE_EMPLOYEE_NAME"	not equal to	%Upper(%Substring(EMPLOYEE."AQE_EMPLOYEE_NAME",7,5))		
AND	EMPLOYEE."A.EMPLID"	equal to	:1		
Group Filter					

This example illustrates the fields and controls on the Add / Edit Filter page. Definitions for the fields and controls appear following the example.

Add / Edit Filter

Filter Expression - Left

Query Alias

JOB

Query Field

A.QE_JOBCODE

Condition Type

equal to

Filter Expression - Right

Criteria Type

Field

Find |  |  | First  1-15 of 15  Last

	Expression 2 Text
☐	EMPLOYEE."A.EMPLID"
☐	EMPLOYEE."A.EFFDT"
☐	EMPLOYEE."A.QE_EMPLOYEE_NAME"
☐	EMPLOYEE."A.QE_FIRST_NAME"
☐	EMPLOYEE."A.QE_LAST_NAME"
☐	EMPLOYEE."A.QE_SOC_SEC_NBR"
☒	EMPLOYEE."A.QE_JOBCODE"
☐	EMPLOYEE."A.DEPTID"
☐	JOB."A.QE_JOBCODE"
☐	JOB."A.DESCR"

Field or Control	Description
Condition Type	Select a value from the Condition Type drop-down list. The available options are <i>greater than</i> , <i>not greater than</i> , <i>less than</i> , <i>not less than</i> , <i>equal to</i> , <i>not equal to</i> , <i>in list</i> , and <i>not in list</i> .

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Field or Control	Description
Criteria Type	Select a value from the Criteria Type drop-down list. The available options are: • Expression: If you select this option, the Expression 2 Text section displays a list of expressions from the base queries. • Field: If you select this option, the Expression 2 Text section displays a list of query fields from the base queries. • Prompt: If you select this option, the Expression 2 Text section displays a list of query prompts from the base queries. • Constant: If you select this option, the Expression 2 Text section displays a constant text box.

Adding Filters to Composite Queries

To add filters to composite queries:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Open an existing composite query or create a new one.
3. In the Composite Query Manager page - Fields section, click the **Actions** icon for the output field that you want to add as a filter and select the **Add Filter** option.

Alternatively, in the Query Selected section, click the **Actions** icon for the field that you want to add as a filter and select the **Add Filter** option.

The Add / Edit Filter page appears, enabling you to create a filter against the selected field.

4. Select a value from the **Condition Type** drop-down list.

The available options are *greater than*, *not greater than*, *less than*, *not less than*, *equal to*, *not equal to*, *in list*, and *not in list*.

5. Select the values in the Filter Expression - Right section.
6. Select a value from the **Criteria Type** drop-down list.

The available options are **Expression**, **Field**, **Prompt**, and **Constant**.

7. Select a value from the Expression 2 Text section.

This value is used for creating the filter with the selected field in the Filter Expression - Left section.

8. Click the **OK** button to create the filter.

The Composite Query Manager page - Filter section appears, listing the newly added filter.

This example illustrates the Add / Edit Filter page and the value in the **Criteria Type** drop-down list is set to *Field*. The Expression 2 Text section displays 10 query fields from the base queries EMPLOYEE and JOB. The **EMPLOYEE."A.QE_JOBCODE"** field is selected for creating the filter with the previously selected field **A.QE_JOBCODE** in the JOB query.

Add / Edit Filter

Filter Expression - Left

Query Alias
JOB

Query Field
A.QE_JOBCODE

Condition Type
equal to

Filter Expression - Right

Criteria Type
Field

Find

First

1-15 of 15

Last

Expression 2 Text
☐ EMPLOYEE."A.EMPLID"
☐ EMPLOYEE."A.EFFDT"
☐ EMPLOYEE."A.QE_EMPLOYEE_NAME"
☐ EMPLOYEE."A.QE_FIRST_NAME"
☐ EMPLOYEE."A.QE_LAST_NAME"
☐ EMPLOYEE."A.QE_SOC_SEC_NBR"
☒ EMPLOYEE."A.QE_JOBCODE"
☐ EMPLOYEE."A.DEPTID"
☐ JOB."A.QE_JOBCODE"
☐ JOB."A.DESCR"

This example illustrates the Add / Edit Filter page and the value in the **Criteria Type** drop-down list is set to *Expression*. The Expression 2 Text section displays all expressions that were defined for the composite query. The *%Upper* expression is selected for creating the filter with the previously selected field **A.QE_EMPLOYEE_NAME** in the EMPLOYEE query.

Add / Edit Filter

Filter Expression - Left

Query Alias
EMPLOYEE

Query Field
A.QE_EMPLOYEE_NAME

Condition Type not equal to

Filter Expression - Right

Criteria Type
Expression

Expression 2 Text	
	%Upper(%Substring(EMPLOYEE."A.QE_EMPLOYEE_NAME",7,5))

This example illustrates the Add / Edit Filter page and the value in the **Criteria Type** drop-down list is set to *Prompt*. The Expression 2 Text section displays all prompts that were defined for the composite query. The *:1 = EMPLID - ID* prompt is selected for creating the filter with the previously selected field **A.EMPLID** in the EMPLOYEE query.

Add / Edit Filter

Filter Expression - Left

Query Alias
EMPLOYEE

Query Field
A.EMPLID

Condition Type equal to

Filter Expression - Right

Criteria Type
Prompt

Find |  |  | First  1-2 of 2  Last

	Expression 2 Text
☒	:1 = JOBCODE - Job Code
☐	:2 = - EMPLID

This example illustrates the Add / Edit Filter page and the value in the **Criteria Type** drop-down list is set to *Constant*. The constant *_an%* finds any employee with the last name containing one or more characters followed by the character *an*. For example, Andersen, Bannister, and Branham.

Add / Edit Filter

Filter Expression - Left

Query Alias
EMPLOYEE

Query Field
A.QE_LAST_NAME

Condition Type equal to

Filter Expression - Right

Criteria Type
Constant

Constant
_an%

This example illustrates the Composite Query Manager page - Filter section after adding field-field, field-expression, and field-prompt filters as defined in the previous examples.

Fields Joins Filters Having SQL

Filters Find 1-4 of 4 Last

Logical	Expression 1	Condition Type	Expression 2	Actions
	JOB."A.QE_JOBCODE"	equal to	EMPLOYEE."A.QE_JOBCODE"	
AND	EMPLOYEE."A.QE_EMPLOYEE_NAME"	not equal to	%Upper(%Substring(EMPLOYEE."A.QE_EMPLOYEE_NAME",7,5))	
AND	EMPLOYEE."A.EMPLID"	equal to	:1	
AND	EMPLOYEE."A.QE_LAST_NAME"	equal to	_an%	

Group Filter

Adding Filters for Expressions in Composite Queries

To add a filter for an expression in a composite query:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Open an existing composite query.
3. In the Composite Query Manager page, Expressions section, click the **Menu** icon for the expression that you want to add a filter to and select the **Add Filters** option.

Alternatively:

- a. In the Composite Query Manager page, Expressions section, click the **Menu** icon for the expression to which you want to add a filter.
 - b. Select the **Add Field** option to add the expression to the output field list.
 - c. In the Fields section, click the **Actions** icon for the expression field that you want to add a filter to and select the **Add Filter** option.
4. Use the Add/Edit Filters page to select the condition type, criteria type, and field (or prompt, expression, constant) to create the filter.

This example illustrates the Add/Edit Filter page displaying the Filter Expression – Left section (the left operand) and the Filter Expression – Right section when you add a filter for an expression field.

Add / Edit Filter

Filter Expression - Left

Expression

Condition Type

Filter Expression - Right

Criteria Type

Find | | First 1-10 of 10 Last

	Expression 2 Text
☐	Q_EMP."A.EMPLID"
☐	Q_EMP."A.EFFDT"
☒	Q_EMP."A.QE_EMPLOYEE_NAME"
☐	Q_EMP."A.QE_FIRST_NAME"
☐	Q_EMP."A.QE_LAST_NAME"
☐	Q_EMP."A.QE_SOC_SEC_NBR"
☐	Q_EMP."A.QE_JOBCODE"
☐	Q_EMP."A.DEPTID"
☐	Q_JOB."A.QE_JOBCODE"
☐	Q_JOB."A.DESCR"

5. Click the OK button to accept the changes and return to the Composite Query Manager page.
The newly added filter is listed in the Composite Query Manager page on the Filters tab.
6. Specify the filter logical properties as needed.
7. Save the composite query.

Editing Filters in Composite Queries

To edit filters in composite queries:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Open an existing composite query.
3. In the Composite Query Manager page, click the **Filters** button.
The Filters section appears.
4. Click the **Actions** icon for the filter that you want to edit and select the **Edit** option.
The Add / Edit Filter page appears.
5. Specify filter properties such as condition type, criteria type, and expression 2 text.
6. Click the **OK** button to accept the changes.

The Composite Query Manager page - Filter section reappears, listing the filter with the new settings.

Removing Filters from Composite Queries

To remove filters from composite queries:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Open an existing composite query.
3. In the Composite Query Manager page, click the **Filters** button.
The Filters section appears.
4. Click the **Actions** icon for the filter that you want to remove.
5. Select the **Remove** option.

The selected filter is removed from the Filters section.

Grouping Filters in Composite Queries

When your composite query includes multiple filter criteria, you may group filter criteria with parentheses to define how filter criteria should be evaluated. For example, filter criteria inside the parentheses are evaluated before the filter criteria outside the parentheses.

Use the Edit Filter Grouping page (PSCPQFILTERGRP_SEC) to edit the filter grouping in a composite query.

This example illustrates the fields and controls on the Edit Filter Grouping page. Definitions for the fields and controls appear following the example.

Edit Filter Grouping

Group Selected

UnGroup Selected

Reset All

Filters

Find |  | First 1-4 of 4 Last

Select	Logical	Expression1	Condition Type	Expression 2
☐		JOB."A.QE_JOBCODE"	equal to	EMPLOYEE."A.QE_JOBCODE"
☐	AND	EMPLOYEE."A.QE_EMPLOYEE_NAME"	not equal to	%Upper(%Substring(EMPLOYEE."A.QE_EMPLOYEE_NAME",7,5))
☐	AND	EMPLOYEE."A.EMPLID"	equal to	:1
☐	AND	EMPLOYEE."A.QE_LAST_NAME"	equal to	_an%

Term	Definition
Group Selected	Click this button to add the parentheses around the selected filters.
UnGroup Selected	Click this button to remove the parentheses around the selected filters.
Reset All	Click this button to remove all parentheses that currently exist in the Filters section.

Steps Used to Group Filter Criteria in Composite Queries

To group the filter criteria in composite queries:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Open an existing composite query.
3. In the Composite Query Manager page, click the **Filters** button.
4. Click the **Group Filter** button to access the Edit Filter Grouping page.
5. Select the filters that you want to group together.

This example shows the Edit Filter Grouping page. The second and the third filters are selected.

Edit Filter Grouping

Group Selected UnGroup Selected Reset All

Select	Logical	Expression1	Condition Type	Expression 2
☐		JOB."A.QE_JOBCODE"	equal to	EMPLOYEE."A.QE_JOBCODE"
☒	AND	EMPLOYEE."A.QE_EMPLOYEE_NAME"	not equal to	%Upper(%Substring(EMPLOYEE."A.QE_EMPLOYEE_NAME",7,5))
☒	AND	EMPLOYEE."A.EMPLID"	equal to	:1
☐	AND	EMPLOYEE."A.QE_LAST_NAME"	equal to	_an%

- Click the **Group Selected** button to add the parentheses around the selected filters.

The selected filters are grouped using parentheses.

- Click the **OK** button to apply the changes to the filters.

The Composite Query Manager page - Filter section reappears showing the grouped filters.

This example shows the Composite Query Manager page - Filter section. The second and the third filters are grouped using parentheses.

Fields Joins Filters Having SQL

Logical	Expression1	Condition Type	Expression 2	Actions
	JOB."A.QE_JOBCODE"	equal to	EMPLOYEE."A.QE_JOBCODE"	
AND	(EMPLOYEE."A.QE_EMPLOYEE_NAME"	not equal to	%Upper(%Substring(EMPLOYEE."A.QE_EMPLOYEE_NAME",7,5))	
AND	EMPLOYEE."A.EMPLID"	equal to	:1)	
AND	EMPLOYEE."A.QE_LAST_NAME"	equal to	_an%	

Group Filter

Applying Aggregate Functions in Composite Queries

To apply aggregate functions to the output field of composite queries:

- Select Reporting Tools, Composite Query, Composite Query Manager.
- Open an existing composite query or create a new one.
- In the Composite Query Manager page - Fields section, select an aggregate option from the **Aggregate** drop-down list.

The available options are *Average*, *Count*, *Count Distinct*, *Max*, *Min*, and *Sum*.

This example illustrates the fields and controls on the Composite Query Manager page - Fields section. The aggregate value for the EMPLOYEE.“A.EMPLID” is set to *Count*.

Fields

Joins

Filters

Having

SQL

Fields

Find

First

1-5 of 5

Last

	Description	Field Format	Heading	Order-By	Aggregate	Actions
1	EMPLOYEE."A.EMPLID"	Char11	ID		Count	
2	EMPLOYEE."A.EFFDT"	Date	Eff Date			
3	EMPLOYEE."A.QE_EMPLOYEE_NAME"	Char60	Name			
4	JOB."A.QE_JOBCODE"	Char6	JobCode			
5	%Upper(%Substring(EMPLOYEE."A.QE_EMPLOYEE_NAME",7,5))	Char5	EXPR1_5_1			

4. Optionally, click the **SQL** button to verify the aggregate setting on the generated SQL.

Applying Group By Clause in Composite Queries

Page Used to Edit the Group By Clause in Composite Queries

The Group By column is added automatically when you apply the first aggregate function to the output field. By default, all non-aggregate output fields are included in the initial Group By clause in the same order as in the output field list. You use the Edit Group By page (PSCPQGROUPOBY_SEC) to edit the order of the **Group By** fields.

This example illustrates the fields and controls on the Edit Group By page.

Edit Group By				
Group By Fields				
Selected Field		Include	Move Up	Move Down
1	EMPLOYEE.“A.EFFDT”	☒	Move Up	Move Down
2	EMPLOYEE.“A.QE_EMPLOYEE_NAME”	☒	Move Up	Move Down
3	JOB.“A.QE_JOBCODE”	☒	Move Up	Move Down
4	%Upper(%Substring(EMPLOYEE.“A.QE_EMPLOYEE_NAME”,7,5))	☒	Move Up	Move Down

Term	Definition
Include	Select this check box to include the selected field in the Group By list.
Move Up	Click this link to move the selected field up in the grid.

Term	Definition
Move Down	Click this link to move the selected field down in the grid.

Steps Used to Edit the Group By List

To edit the Group By list:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Create a new composite query or open an existing one.
3. In the Composite Query Manager page, Fields section, optionally select an aggregate option from the **Aggregate** column for the field to which you want to add aggregate.

This example illustrates the Composite Query Manager page. The Fields section displays the aggregate Count for the employee ID field.

The screenshot shows the 'Composite Query Manager' interface. At the top, there's a navigation bar with 'My Homepage', 'Composite Query Manager', and icons for home, flag, menu, and refresh. Below the navigation bar, the 'Composite Query Name' is 'EMPL_AND_JOB', 'Type' is 'Public', 'Status' is 'In Progress', and 'Description' is 'Employee and Job Code'. On the left, there's a sidebar with 'Actions' and 'Query Selected' sections. The 'Query Selected' section lists 'EMPLOYEE' and 'JOB' with sub-items 'A.QE_JOBCODE' and 'A.DESCR'. The main area has tabs for 'Fields', 'Joins', 'Filters', 'Having', and 'SQL'. The 'Fields' tab is active, showing a table with 4 rows of fields. Each row has columns for 'Description', 'Field Format', 'Heading', 'Order-By', 'Aggregate', and 'Actions'. The 'Aggregate' column for the first row (EMPLOYEE.A.EMPLID) is set to 'Count'.

Description	Field Format	Heading	Order-By	Aggregate	Actions
1 EMPLOYEE.A.EMPLID	Char11	ID		Count	
2 EMPLOYEE.A.EFFDT	Date	Eff Date			
3 EMPLOYEE.A.QE_EMPLOYEE_NAME	Char60	Name			
4 JOB.A.QE_JOBCODE	Char6	JobCode			

4. Click the **Actions** icon of an output field and select the **Edit Group By** option to display the Edit Group By page.

Note: The **Edit Group By** option is available in **Actions** for all output fields, including the aggregate fields. However, in the Edit Group By page, the aggregate fields are not included in the **Group By Fields** list.

This example illustrates the Edit Group By page. All fields except the aggregate field from the output field list are included and grouped automatically.

Edit Group By

Group By Fields					
		Find	First	1-3 of 3	Last
	Selected Field	Include	Move Up	Move Down	
1	EMPLOYEE."A.EFFDT"	☒	Move Up	Move Down	
2	EMPLOYEE."A.QE_EMPLOYEE_NAME"	☒	Move Up	Move Down	
3	JOB."A.QE_JOBCODE"	☒	Move Up	Move Down	

5. Select the **Include** check boxes for the fields to include those fields in the Group By clause.

Otherwise, deselect the Include check boxes for the fields to remove those fields from the Group By clause.

Note: You may deselect the **Include** check box for any field to remove that field from the Group By clause, but your removal may cause an error if the removed field must be included in the Group By clause.

6. Optionally, click the **Move Up** or **Move Down** link to reorder the fields in the Group By clause.
7. Click the **OK** button to apply the changes and return to the Composite Query Manager page.
8. Optionally, click the **SQL** button to verify the Group By clause in the generated SQL.

Aggregated fields and aggregated expression fields should not be included in the Group By list. By default, aggregated fields are not included in the Group By list. However, if an expression field contains aggregation, it is included in the Group By list by default because the system has read it as a regular non-aggregate expression field. To avoid the error when you run SQL, you must remove the aggregate expression field from the Group By list by deselecting its Include check box or by removing it from the output field list.

After the Group By clause is generated, the order of the **Group By** columns is persisted, so removing or adding output fields does not reset the order of the **Group By** columns. If you add an additional output field to the composite query for the existing Group By clause, then the new output field is added to the end of the Group By clause. You should ensure that the fields listed in the Group By clause are in the correct order. To reset all **Group By** fields, you must remove all aggregate values from the output fields, add those fields back to the output field list, and then regenerate the default Group By clause.

Editing Field Properties

Use the Edit Field Properties page (PSCPQFIELD_SEC) to add or edit the field properties, including the unique field names and field headings.

Navigation:

- 1. Select Reporting Tools, Composite Query, Composite Query Manager.
- 2. Open an existing composite query or create a new one.
- 3. In the Composite Query Manager page, Fields section, click the Action icon for the field for which you want to modify the field properties.
- 4. Select the Edit Field option.

Navigation

This example illustrates the Edit Field Properties page. Definitions for the fields and controls appear following the example.

Edit Field Properties

JOB."A.QE_JOBCODE":

JOB."A.QE_JOBCODE"

*Unique Name

JOB.A.QE_JOBCODE

Heading

JobCode

Field or Control	Description
Unique Name	Use this field to change the default unique name for a field or an expression. By default, the format of a unique field name is <i><query alias>.<query unique field name></i> and the format of a unique expression name is <i>EXPR<SELNum>_<colnum>_<exprNum></i>.
Heading	Enter new heading text for the field heading. By default, this field is blank for all fields from the base query. If the field is an expression created within the composite query, then this field displays the expression heading.

Defining HAVING Criteria in Composite Queries

Pages Used to Define HAVING Criteria in Composite Queries

Use the Composite Query Manager page - Having section and the Add / Edit Having page (PSCPQFILTERDTL_SEC) to view, define, and maintain the Having criteria that are defined for the composite query.

Navigation:

- 1. Select Reporting Tools, Composite Query, Composite Query Manager.
- 2. Create a new composite query or open an existing one.
- 3. In the Composite Query Manager page - Fields section, click the **Actions** icon for the aggregate field that you want to add the Having criteria.
- 4. Select the **Add Having** option.

The Add / Edit Having page appears, enabling you to create Having criteria against the selected field.

This example illustrates the fields and controls on the Add / Edit Filter page and the value in the **Criteria Type** drop-down list is set to *Field*. The *EMPLOYEE."EXPR1_5_1"* field is selected for creating the having criteria with the previously selected field *A.QE_EMPLOYEE_NAME* in the EMPLOYEE query.

Add / Edit Having

Filter Expression - Left

Query Alias

EMPLOYEE

Query Field

A.QE_EMPLOYEE_NAME

Condition Type

equal to

Filter Expression - Right

Criteria Type

Field

Find

First

1-3 of 3

Last

	Expression 2 Text
☐	EMPLOYEE."A.EFFDT"
☐	JOB."A.QE_JOBCODE"
☒	EMPLOYEE."EXPR1_5_1"

Field or Control	Description
Condition Type	Select a value from the drop-down list. The available options are <i>equal to</i> , <i>greater than</i> , <i>less than</i> , <i>not greater than</i> , <i>not less than</i> , and <i>not equal to</i> .

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Field or Control	Description
Criteria Type	Select a value from the Criteria Type drop-down list. The available options are: <i>Expression:</i> If you select this option, the Expression 2 Text section displays a list of the expressions from the base queries. <i>Field:</i> If you select this option, the Expression 2 Text section displays a list of the query fields from the base queries. <i>Prompt:</i> If you select this option, the Expression 2 Text section displays a list of the query prompts from the base queries.

This example illustrates the fields and controls on the Composite Query Manager page - Having section after adding Having criteria. You can use the **Action** icon in the Having section to edit or remove the Having criteria from the composite query.

Adding Having Criteria to Composite Queries

To add Having criteria to composite queries:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Open an existing composite query or create a new one.
3. In the Composite Query Manager page - Fields section, click the *Actions* icon for the aggregate field that you want to add Having criteria.
4. Select the *Add Having* option.

The Add / Edit Having page appears.

5. Select a value from the **Condition Type** drop-down list.
6. Select a value in the Filter Expression - Right section.
7. Select a value from the **Criteria Type** drop-down list.

The available options are *Expression*, *Field*, and *Prompt*.

8. Select a value from the Expression 2 Text section. This value is used for creating the Having criteria with the selected field in the Filter Expression - Left section.
9. Click the *OK* button to create the Having criteria.

The Composite Query Manager page - Having section reappears listing the newly added Having criteria.

Editing Having Criteria in Composite Queries

To edit Having Criteria in composite queries:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Open an existing composite query.
3. In the Composite Query Manager page, click the **Having** button.

The Having section appears.

4. Click the **Actions** icon for the Having criteria that you want to edit and select the *Edit* option.

The Add / Edit Having page appears.

5. Specify the Having properties such as condition type, criteria type, and expression 2 text.
6. Click the **OK** button to accept the changes.

The Composite Query Manager page - Having section reappears, listing the Having criteria with the new settings.

Removing Having Criteria from Composite Queries

To remove Having criteria from composite queries:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Open an existing composite query.
3. In the Composite Query Manager page, click the **Having** button.

The Having section appears.

4. Click the **Actions** icon for the Having criteria that you want to remove and select the *Remove* option.

The selected Having criteria is removed from the Having section.

Grouping the Having Criteria in Composite Queries

When the composite query has multiple having criteria, you may group them using the parentheses to define how they should be evaluated. For example, the Having criteria inside the parentheses are evaluated before the ones outside of the parentheses.

Use the Edit Having Criteria Grouping page (PSCPQHAVINGGRP_SEC) to edit the Having criteria grouping in a composite query.

This example illustrates the fields and controls on the Edit Having Criteria Grouping page. Definitions for the fields and controls appear following the example.

Edit Having Criteria Grouping

Group Selected

UnGroup Selected

Reset All

Having

Find | | First 1-2 of 2 Last

Select	Logical	Expression1	Condition Type	Expression 2
☐		EMPLOYEE."A.QE_EMPLOYEE_NAME"	equal to	EMPLOYEE."EXPR1_5_1"
☐	AND	EMPLOYEE."A.EFFDT"	equal to	DEPT."A.EFFDT"

Term	Definition
Group Selected	Click this button to add the parentheses around the selected Having criteria.
UnGroup Selected	Click this button to remove the parentheses around the Having criteria.
Reset All	Click this button to remove all parentheses that currently exist in the Having section.

Steps Used to Group Having Criteria in Composite Queries

To group Having criteria in composite queries:

- 1. Select Reporting Tools, Composite Query, Composite Query Manager.
- 2. Open an existing composite query or create a new one.
- 3. In the Composite Query Manager page, click the **Having** button.
- 4. Click the **Group Having** button to access the Edit Having Criteria Grouping page.
- 5. Select the Having criteria that you want to group together.
- 6. Click the **Group Selected** button to add parentheses around the selected Having criteria.

The selected Having criteria are grouped together using parentheses.

- 7. Click the **OK** button to apply the changes to the Having criteria.

The Composite Query Manager page - Having section reappears, displaying the Having criteria grouped as specified.

Viewing SQL in Composite Queries

Use the Composite Query Manager page - SQL section to view the generated SQL statement for a composite query. You can also use this section to view the SQL statement that is generated with the pruning option.

Navigation:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Create a new composite query or open an existing one.
3. In the Composite Query Manager page, click the **SQL** button.

The Composite Query Manager page - SQL section appears, displaying the generated SQL statement for the composite query. By default, the system displays the SQL statement in the *No Pruning* mode.

This example illustrates the Composite Query Manager page - SQL section with the **SQL Pruning** drop-down list set to *No Pruning*.



Fields Joins Filters Having SQL 

SQL Pruning

```

SELECT EMPL."A.EMPLID",
       EMPL."A.QE_EMPLOYEE_NAME"
FROM
  (SELECT A.EMPLID AS "A.EMPLID",
        TO_CHAR(A.EFFDT,'YYYY-MM-DD') AS "A.EFFDT",
        A.QE_EMPLOYEE_NAME AS "A.QE_EMPLOYEE_NAME",
        A.QE_FIRST_NAME AS "A.QE_FIRST_NAME",
        A.QE_LAST_NAME AS "A.QE_LAST_NAME",
        A.QE_SOC_SEC_NBR AS "A.QE_SOC_SEC_NBR",
        A.QE_JOBCODE AS "A.QE_JOBCODE",
        A.DEPTID AS "A.DEPTID",
        B.EMPNAME AS "B.EMPNAME",
        B.EMPLID AS "B.EMPLID",
        B.DEPTID AS "B.DEPTID",
        B.DEPTNAME AS "B.DEPTNAME"
  FROM (PS_QE_EMPLOYEE A LEFT OUTER
  JOIN
    PS_QE_EMPL B
  ON
    A.EMPLID = B.EMPLID )
  WHERE ( A.EFFDT =
    (SELECT MAX(A_ED.EFFDT) FROM PS_QE_EMPLOYEE A_ED
     WHERE A.EMPLID = A_ED.EMPLID
     AND A_ED.EFFDT <= SYSDATE)) ) EMPL
  JOIN
    ( SELECT A.QE_JOBCODE AS "A.QE_JOBCODE",
          A.DESCR AS "A.DESCR"
    FROM PS_QE_JOBCODE_TBL A
    ORDER BY 1,
          2 ) JOB
  ON
    EMPL."A.QE_JOBCODE" = JOB."A.QE_JOBCODE"
  
```

SQL Pruning

Based on the attributes that are selected in the result sets and the attribute dependency, Composite Query might be able to simplify the SQL statements that are generated for the underlying queries. The pruning process removes the tables in the FROM clause if the pruning rules allow. It also removes the columns in the SELECT clause, which corresponds to the view row attributes that users have not selected.

The available pruning types are:

- **No Pruning**

Selecting this option enables the system to produce a full SQL statement without any pruning.

By default, the **Pruning Type** is set to **No Pruning**.

- **Standard Pruning**

Selecting this option enables the system to prune only a field or a table when the pruning process does not change the result set. That is, the result sets of the SQL statements that are generated by the Standard Pruning and No Pruning options are identical. The field is not pruned if it is used in the query, such as JOIN criteria in the FROM, WHERE, GROUP BY, or ORDER BY clauses.

Note: In general, standard pruning does not prune much except the Cartesian Join, where a table does not have any relationship with other tables.

- **Prune to Select List**

Selecting this option enables the system to remove all join criteria and joined tables from the SQL if the fields from that table are not selected. That is, the system can prune a table from the query if no field in the table is selected for the composite query. This pruning option can change the result set because the table that is being pruned can have been used to filter the result set based on the JOIN it has against the other tables.

You should select the **Prune to Select List** option where the result set is not altered. To accomplish that, you should ensure the join produces only extra columns and nothing more. The implication is that the relationship between the joined tables is many-to-one or one-to-one.

Note: The **Standard Pruning** and **Prune to Select List** options enable the system to prune a field from the SELECT clause if it is not used by the composite query.

The dependency settings of the base queries in the Query Manager - Dependency tab are also used to determine whether a field or a table can be pruned.

Related Links

[Defining Record and Field Dependencies](#)

Previewing Composite Query Results and Viewing Composite Query Properties

Previewing Composite Query Results

Use the composite query Preview page (PSCPQPREVIEW) to preview the composite query results. By default, the system display the composite query without pruning and the results are based on the **Maximum Rows Fetched** setting. You can change the pruning type and the **Maximum Rows Fetched** setting to display more or fewer result rows.

Navigation:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Create a new composite query or open an existing one.
3. In the Composite Query Manager page, move your mouse over the **Action** menu icon (next to the **SQL** button) and select the **Run/Preview** option.

The composite query Preview page appears, displaying the composite query result.

This example illustrates the fields and controls on the composite query Preview page. The **Pruning Type** is set to *No Pruning*.

< My Homepage

Preview



New Window

Preview

Pruning Type

☒ No Pruning

☐ Standard Pruning

☐ Prune to Select List

Maximum Rows Fetched

100

Preview

Download

ID	Name	JobCode	Descr	Dept	Descr	SetID	query drilling url	component drilling url	external drilling url
1	7705 Holt,Susan	G061	Employment Specialist	10200	Human Resources	QEDM1	http://sic05aql.us.oracle.com/pspp/Q855OIT_297/EMPLOYEE/QE_LOCAL/??ICAction=ICOnNameURL=Public.QE_EMP_DESTINATION&BND1=10200	http://sic05aql.us.oracle.com/pspp/Q855OIT_newwin/EMPLOYEE/QE_LOCAL/??QE_SAMPLE_APPS.QE_DEPT_TBL_GBL?Action=U&DEPTID=10200&SETID=QEDM1	http://sic05aql.us.oracle.com/pspp/Q855OIT_297/EMPLOYEE/QE_LOCAL/??url=http://www.cnn.com
2	8001 Schumacher,Simon	1001	President & CEO	10100	Office of the President	QEDM1	http://sic05aql.us.oracle.com/pspp/Q855OIT_297/EMPLOYEE/QE_LOCAL/??ICAction=ICOnNameURL=Public.QE_EMP_DESTINATION&BND1=10100	http://sic05aql.us.oracle.com/pspp/Q855OIT_newwin/EMPLOYEE/QE_LOCAL/??QE_SAMPLE_APPS.QE_DEPT_TBL_GBL?Action=U&DEPTID=10100&SETID=QEDM1	http://sic05aql.us.oracle.com/pspp/Q855OIT_297/EMPLOYEE/QE_LOCAL/??url=http://www.cnn.com
3	8001 Schumacher,Simon	6001	Sr Secretary	10200	Human Resources	QEDM1	http://sic05aql.us.oracle.com/pspp/Q855OIT_297/EMPLOYEE/QE_LOCAL/??ICAction=ICOnNameURL=Public.QE_EMP_DESTINATION&BND1=10200	http://sic05aql.us.oracle.com/pspp/Q855OIT_newwin/EMPLOYEE/QE_LOCAL/??QE_SAMPLE_APPS.QE_DEPT_TBL_GBL?Action=U&DEPTID=10200&SETID=QEDM1	http://sic05aql.us.oracle.com/pspp/Q855OIT_297/EMPLOYEE/QE_LOCAL/??url=http://www.cnn.com
4	8052 Avery,Joan	6001	Sr Secretary	10200	Human Resources	QEDM1	http://sic05aql.us.oracle.com/pspp/Q855OIT_297/EMPLOYEE/QE_LOCAL/??ICAction=ICOnNameURL=Public.QE_EMP_DESTINATION&BND1=10200	http://sic05aql.us.oracle.com/pspp/Q855OIT_newwin/EMPLOYEE/QE_LOCAL/??QE_SAMPLE_APPS.QE_DEPT_TBL_GBL?Action=U&DEPTID=10200&SETID=QEDM1	http://sic05aql.us.oracle.com/pspp/Q855OIT_297/EMPLOYEE/QE_LOCAL/??url=http://www.cnn.com
5	8101 Penrose,Steven	6001	Sr Secretary	10200	Human Resources	QEDM1	http://sic05aql.us.oracle.com/pspp/Q855OIT_297/EMPLOYEE/QE_LOCAL/??ICAction=ICOnNameURL=Public.QE_EMP_DESTINATION&BND1=10200	http://sic05aql.us.oracle.com/pspp/Q855OIT_newwin/EMPLOYEE/QE_LOCAL/??QE_SAMPLE_APPS.QE_DEPT_TBL_GBL?Action=U&DEPTID=10200&SETID=QEDM1	http://sic05aql.us.oracle.com/pspp/Q855OIT_297/EMPLOYEE/QE_LOCAL/??url=http://www.cnn.com

Term	Definition
Pruning Type	Based on the attributes that are selected in the result sets and the attribute dependency, Composite Query might be able to simplify the SQL statements that are generated for the underlying queries. The pruning process removes the tables in the FROM clause if the pruning rules allow. It also removes the columns in the SELECT clause, which corresponds to the view row attributes that users have not selected. The available pruning types are: No Pruning Selecting this option enables the system to produce a full SQL statement without any pruning. By default, the Pruning Type is set to No Pruning. Standard Pruning Selecting this option enables the system to prune only a field or a table when the pruning process does not change the result set. The result sets of the SQL statements that are generated by the Standard Pruning and No Pruning options are identical. The field is not pruned if it is used in the query, such as the JOIN criteria in the FROM, WHERE, GROUP BY, or ORDER BY clauses. Note: In general, standard pruning does not prune much except the Cartesian Join, where a table does not have any relationship with other tables. Prune to Select List Selecting this option enables the system to remove all join criteria and joined table from the SQL if the fields from that table is not selected. The system can prune a table from the query if no field in the table is selected for the composite query. This pruning option can change the result set because the table that is being pruned can have been used to filter the result set based on the JOIN it has against the other tables. You should select the Prune to Select List option when the result set is not altered. To accomplish that, you should ensure the join produces only extra columns and nothing more. The implication is that the relationship between the joined tables is many-to-one or one-to-one. Note: The Standard Pruning and Prune to Select List options enable the system to prune a field from the SELECT clause if it is not used by the composite query. The dependency settings of the base queries in the Query Manager – Dependency tab are also used to determine whether a field or a table can be pruned. See Defining Record and Field Dependencies.

Term	Definition
Maximum Rows Fetched	Use to specify the maximum number of rows returned. By default, the value in the Maximum Rows Fetched field is set to 100.
Preview	Click this button to refresh the results using the new settings in the composite query Preview page. If the composite query has prompts, a prompt window appears after you click the Preview button.
Download	Click to select an option to download the composite query results to either an HTML file or an XML file.

Steps Used to Preview Composite Query Results

To preview composite query results:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Create a new composite query or open an existing one.
3. In the Composite Query Manager page, move your mouse over the **Option** menu icon (next to the **SQL** button).
4. Select the **Run/Preview** option to preview the composite query results.

If runtime prompts exist, the prompt dialog appears.

5. If needed, enter the valid prompt values and click the **OK** button.

The composite query Preview page appears, listing the composite query results.

6. Optionally, change the values in the **Pruning Type** section or the **Maximum Row Fetched** field and then click the **Preview** button to view the newly refreshed composite query results.
7. Optionally, use the **Download** menu link to download the full results of the composite query to an HTML or a XML file.

Viewing Composite Query Properties

Use the Properties page (PSCPQPROPERTIES) to view and edit the property settings of the composite query, including owner ID, comments, and distinct option.

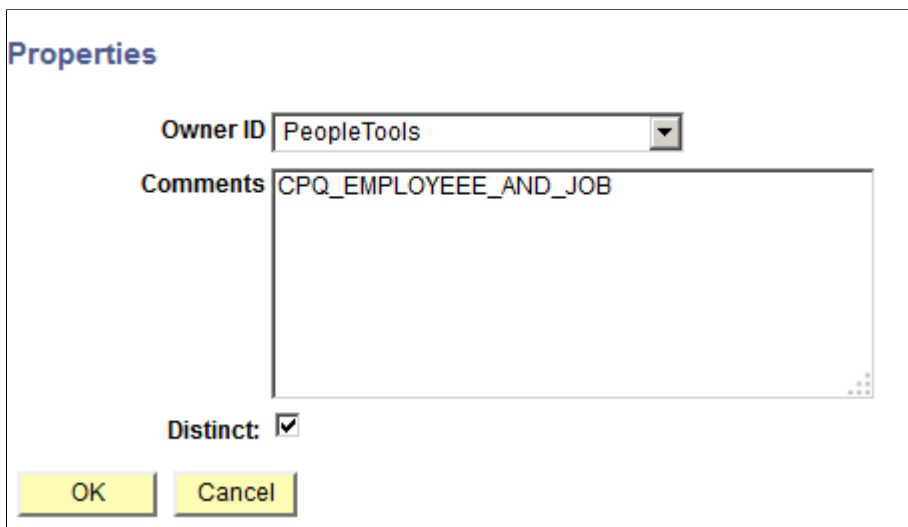
Navigation:

1. Select Reporting Tools, Composite Query, Composite Query Manager.
2. Create a new composite query or open an existing one.

3. In the Composite Query Manager page, move your mouse over the **Action** menu icon (next to the **SQL** button).
4. Select the **Properties** option to view the property settings of the composite query.

The Properties page appears, displaying the properties settings of the composite query.

This example illustrates the fields and controls on the Properties page. The **Distinct** option is selected to eliminate duplicate rows in the composite query result.



The screenshot shows a dialog box titled "Properties" in blue text. It contains two main input fields: "Owner ID" with a dropdown menu showing "PeopleTools" and a small downward arrow, and "Comments" with a text area containing "CPQ_EMPLOYEE_AND_JOB". Below these fields is a checkbox labeled "Distinct:" which is checked. At the bottom of the dialog are two buttons: "OK" and "Cancel", both with yellow backgrounds.

Editing, Copying, and Deleting Composite Queries

Page Used to Edit, Copy, and Delete Composite Queries

Use the **Edit**, **Copy**, and **Delete** links in the Composite Query Manager search page (PSCPQSRCH) to edit, copy, and delete existing composite queries.

Navigation:

Reporting Tools > Composite Query > Composite Query Manager

This example illustrates the Composite Query Manager search page, including the **Edit**, **Copy**, and **Delete** links.

Composite Query Manager

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

[Find an Existing Value](#) | [Add a New Value](#)

Search By begins with

Search [Advanced Search](#)

Composite Query		Personalize	Find	View All	First	1-11 of 11	Last
Name	Description	Owner	Status	Edit	Copy	Delete	
EMPL_AND_JOB	Employee and Job Code	Public	Active	Edit	Copy	Delete	
EMPL_JOB	EMPL_JOB	Public	Active	Edit	Copy	Delete	
QE_CPQ_SMOKE	smoke composite query	Public	Active	Edit	Copy	Delete	
QE_CPQ_SMOKE_FILTERS	smoke composite query filters	Public	Active	Edit	Copy	Delete	
QE_CPQ_SMOKE_PROMPT	smoke composite query prompt	Public	Active	Edit	Copy	Delete	

Editing Composite Queries

To edit composite queries:

1. Select Reporting Tools, Composite Query, Composite Query Manager.

The Composite Query Manager search page appears.

2. Click the **Search** button.

A list of existing composite queries appears.

3. Click the **Edit** link for the composite query that you want to edit.

The Composite Query Manager page appears. From this page, you can edit the composite query by adding base queries, defining prompts and expressions, applying aggregate functions, and so on.

This example illustrates the Composite Query Manager page, where you can edit the composite query.

Composite Query Manager

Composite Query Name: EMPL_AND_JOB_2

Type: Public

*Status:

Description:

[New Window](#)

Actions

Query Selected

- EMPLOYEE
- DEPT
- JOB

Prompts

- :1 = EMPID
- :2 = JOBCODE

Expressions

- %Upper(%Substring(EMPLOYEE."A...

Fields

Description	Field Format	Heading	Order-By	Aggregate	Actions
1 EMPLOYEE."A.EMPLID"	Char11	ID		Count	Edit
2 EMPLOYEE."A.EFFDT"	Date	Eff Date			Edit
3 EMPLOYEE."A.QE_EMPLOYEE_NAME"	Char60	Name			Edit
4 JOB."A.QE_JOBCODE"	Char6	JobCode			Edit
5 %Upper(%Substring(EMPLOYEE."A.QE_EMPLOYEE_NAME",7,5))	Char5	EXPR1_5_1			Edit

Deleting Composite Queries

To delete composite queries:

1. Select Reporting Tools, Composite Query, Composite Query Manager.

The Composite Query Manager search page appears.

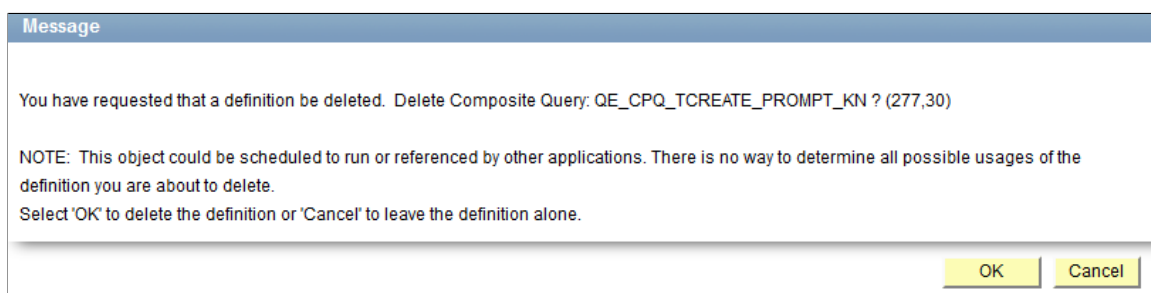
2. Click the **Search** button.

A list of existing composite queries appears.

3. Click the **Delete** link for the composite query that you want to delete.

A delete warning message appears.

This example show the delete warning message when you delete a composite query.



4. Click the **OK** button to confirm that you want to delete the selected composite query.

The Composite Query Manager search page reappears, displaying a delete confirmation message.

Copying Composite Queries

Use the Copy Composite Query page (PSCONQRSCOPY) to copy the composite queries.

This example illustrates the fields and controls on the Copy Composite Query page.

The screenshot displays the 'Copy Composite Query' page, which is divided into two main sections: 'Source Composite Query' and 'Target Composite Query'.

Source Composite Query:

- Composite Query:** CPQ_TCREATE_PROMPT
- Status:** Active
- ☒ **Public**
- Description:**
 - Description:** CPQ_CREATE_PROMPT
 - Comments:** CPQ_CREATE_PROMPT for debugging and verification

Target Composite Query:

- *Composite Query:** CPQ_TCREATE_PROMPT_COPY
- *Status:** Active (dropdown menu)
- ☒ **Public**
- Description:**
 - Description:** CPQ_CREATE_PROMPT_COPY
 - Comments:** Copy of CPQ_CREATE_PROMPT for debugging and verification

Steps Used to Copy Composite Queries

To copy composite queries:

1. Select Reporting Tools, Composite Query, Composite Query Manager.

The Composite Query Manager search page appears.

2. Click the **Search** button.

A list of existing composite queries appears.

3. Click the **Copy** link for the composite query that you want to copy.

The Copy Composite Query page appears.

4. Enter a unique name, set the status, and select the type for the target composite query.

5. Optionally, modify the query description and comment for the target composite query.

6. Click the **Save** button.

The Composite Query Manager search page appears, listing the cloned composite query along with other existing composite queries.

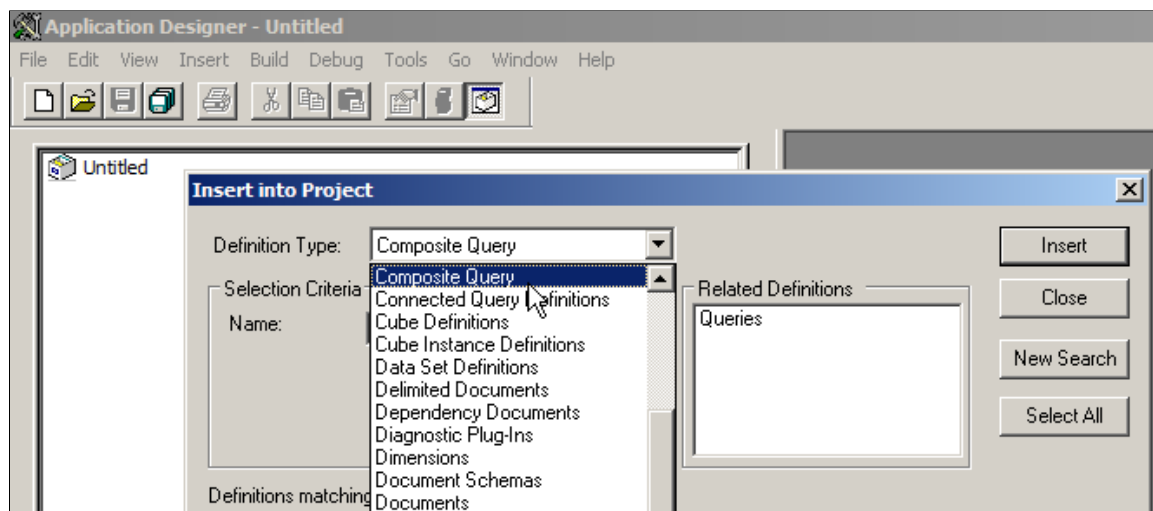
Copying Composite Query Definitions Between Databases

Composite Query is a managed object that can be copied between databases using database project. To copy a composite query between databases:

1. Use Application Designer to create a project.
2. Insert a Composite Query definition into the project.
3. Copy the database project (that has the Composite Query definition) between databases.

Note: Database projects that have the Composite Query definitions can also be exported to or from file and imported to or from file.

This example illustrates Application Designer - Insert into Project dialog box. Composite Query is one of the definition types.



Using Composite Query Viewer

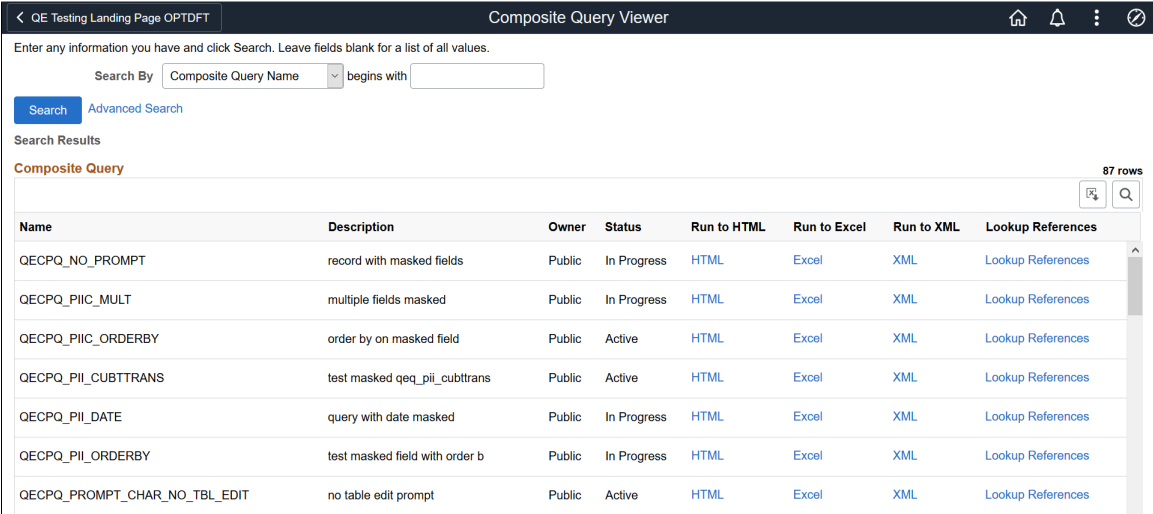
Composite Query Viewer is a read-only version of the Composite Query Manager. It enables security administrators to limit users with a role of Composite Query User (permission list PTPT5900) to search for and view composite queries.

Use the Composite Query Viewer page (PSCPQVIEWER_SRCH) to view the results of a composite query in HTML, Excel, or XML with results displayed in a separate window.

Navigation:

Reporting Tools > Composite Query > Composite Query Viewer

This example illustrates the fields and controls on the Composite Query Viewer page. Definitions for the fields and controls appear following the example.



Field or Control	Description
Search	Select to search for a composite query using the basic search function. Combined with only the <i>begins with</i> condition, the basic search enables you to select the following <i>Search by</i> criteria: Composite Query Description, Composite Query Name, Composite Query Status, and Owner.
Advanced Search	Select the Advanced Search link to search for a composite query using the advanced search function. The advanced search enables you to perform a narrower search by using one or more <i>Search by</i> criteria and selections of conditions for each <i>Search by</i> criterion. You can select the following <i>Search by</i> criteria: Composite Query name, Description, Status, Ownership Type, and Case Sensitive Search.
HTML	Select an HTML link to run the composite query immediately using PeopleSoft Process Scheduler, and then view its HTML results in a new browser window.
Excel	Select an Excel link to run the composite query immediately using PeopleSoft Process Scheduler, and then view its results in an Excel spreadsheet.
XML	Select an XML link to run the composite query immediately using PeopleSoft Process Scheduler, and then view its XML results in a new browser window.

Field or Control	Description
Lookup References	Select this link to display the Definitional References to Composite Query window where you can view all PeopleSoft definitional objects that use this particular composite query as the data source. The results show the definition ID, definition type, and definition sub-types if they are available.

Related Links

[Composite Query Overview](#)

[Creating Composite Query Definitions](#)

Using Composite Query Scheduler

Use the Composite Query Scheduler page (PSCPQ_RUNCTL_FL) to schedule a composite query to run in the PeopleSoft Process Scheduler.

Navigation:

You can schedule a composite query by selecting **Reporting Tools > Composite Query > Schedule Composite Query**. Composite Query interacts with Application Engine program PSCOMPQRY to enable you to schedule composite queries. You can search for an existing run control ID or create a new run control ID and schedule a composite query using the Composite Query Scheduler page, check the status of your request using the Process Monitor link, and view your output using the Report Manager link.

This example illustrates sample values of fields and controls associated with existing run controls on the Composite Query Scheduler page.

Composite Query Scheduler

Select an existing Run Control or add a new one.

Existing Run Controls

Run Control ID ↕	Description ↕	Composite Query ↕
1	date prompt	QECPO_PROMPT_DATE
2	cpq with expr field & prompt	QECPO_ACT_EXPR_FIELD
3	no table edit prompt	QECPO_PROMPT_CHAR_NO_TBL_EDIT

Applying Filter Options to Select Existing Run Control ID

You must select a Run Control ID to schedule a composite query corresponding to it.

To filter the results for Run Control ID:

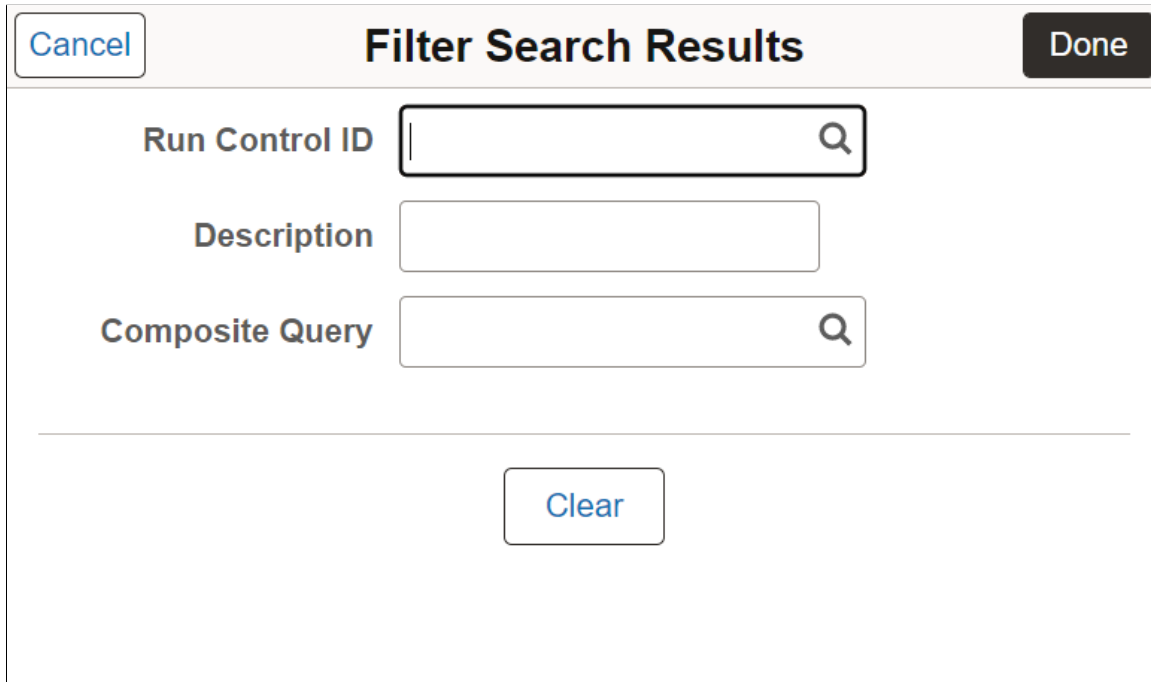
1. Click **Apply Filter** on the Composite Query Scheduler page.

2. Enter the Run Control ID in the **Run Control ID** field in Filter Search Results dialog box. Partial search is enabled in this field so that relevant search results appear as you type the characters in the Run Control ID. You can also look up valid values for Run Control IDs using the magnifying glass icon in the field.

Alternatively, you can filter the search results by entering composite query name or by looking up the valid values for composite queries in Composite Query field.

3. Click **Done**.

This example illustrates the fields and controls on the Filter Search Results dialog box.



The image shows a dialog box titled "Filter Search Results". At the top left is a "Cancel" button, and at the top right is a "Done" button. The main area contains three input fields: "Run Control ID" with a magnifying glass icon, "Description", and "Composite Query" with a magnifying glass icon. Below these fields is a "Clear" button.

Adding a New Run Control ID

You can create a new run control ID if there are no existing IDs that satisfy the desired query parameters to schedule a composite query.

To add a new Run Control ID:

1. Click **Add New Run Control** on the Composite Query Scheduler page.
2. Enter the run control ID in the Run Control ID field.
3. Enter the composite query name in **Composite Query** field. You can also look up the valid values for composite queries using the magnifying glass icon in the field. Partial search is enabled in this field, so that relevant search results appear as you type the characters in the composite query name. Description field is automatically filled when you select the composite query.
4. Click **Save**.

This example illustrates sample values of fields and controls displayed on the Composite Query Scheduler page after selecting the Run Control ID. Definitions for the fields and controls appear following the example.

Composite Query Scheduler

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

Run

Run Control ID 2

*Composite Query QECPO_ACT_EXPR_FIEL Q

*Description cpq with expr field & promp

Composite Query Parameters

Update Parameters

Prompt Name	Value
QE_BAM_MONTH_FLD	03/01/2004
QE_BAM_PRDSALES_FL	100005

Save

Return to Search

Add New Run Control

Field or Control	Description
Report Manager	Click to access the Report Manager page to view the report content after the output file is posted and the output destination is set to <i>Web</i> or <i>Window</i> . The final output file is posted to the Report Manager repository for web access by authorized users. See “Administering Report Manager” (Process Scheduler)
Process Monitor	Click to access the Process Monitor page and check the progress of your request. See “Understanding Process Monitor” (Process Scheduler), “Viewing the Status of Processes” (Process Scheduler)
Run	Click to access the Process Scheduler Request page, where you can specify variables, such as where a process runs and in what format the process output is generated. The values for output type and output format appear by default per the report definition and can be changed if the report definition allows it. The process instance gets displayed on Composite Query Scheduler page once the process is scheduled.
Run Control ID	The selected run control ID that is used to schedule a composite query.
Composite Query	Enter or search for a composite query.
Description	Auto-filled description of the composite query.
Update Parameters	Click to update the runtime prompt values of composite query. See “Submitting Process Requests” (Process Scheduler)

<i>Field or Control</i>	<i>Description</i>
Save	Click to save the changes made to the composite query parameters.
Return to Search	Click to return to the Composite Query Scheduler page displaying the existing run controls.
Add New Run Control	Click to add a new run control.

Related Links

[Scheduling Queries](#)

[Using Connected Query Scheduler](#)

“Running BI Publisher PeopleSoft Query Reports” (BI Publisher for PeopleSoft)

Creating 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.

This example illustrates the fields and controls on the Query Properties page with the **Security Join Optimizer** option selected.

Query Properties

*Query

Description

Folder

*Query Type

*Owner

☐ Distinct ☒ Security Join Optimizer

Query Definition:

Image Fields

☒ Blank Value

☐ Image Data

☐ Image Hyperlink

Last Updated Date/Time 10/30/2003 2:45:06PM

Last Update User ID PPLSOFT

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 the **OK** button.

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].

Related Links

[Understanding Query Types](#)

[Using Query Profiles](#)

Chapter 10

PeopleSoft Query Security

Using Query Access Group Trees

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

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.

PeopleSoft Query does not apply the following query tree securities to role, process and archive types of query:

- Table set control record
- Row-level security
- Query access tree security

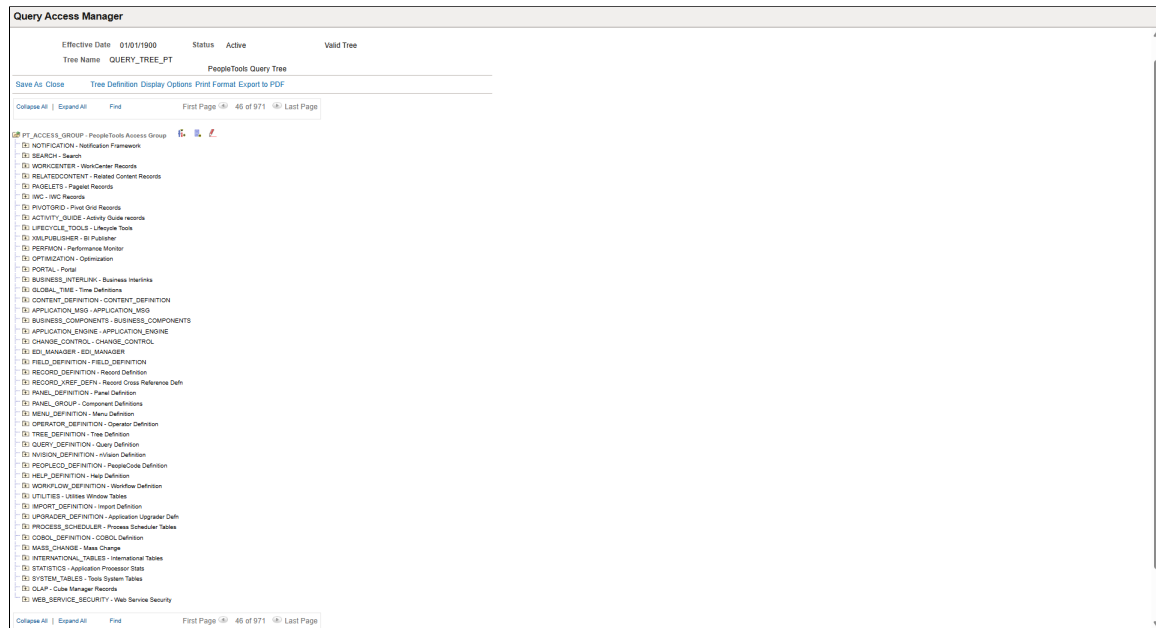
Creating Query Trees

Use the Query Access Manager page (PSTREEMGRACC) to create query trees or search for existing query trees.

Navigation:

PeopleTools > Security > Query Security > Query Access Manager

This example illustrates the fields and controls on the Query Access Manager page.



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**).

Related Links

“Setting Query Permissions” (Security Administration)

Enabling the Query Access List Cache

An optional batch process is available for users who work with Query Manager 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.

This example illustrates the fields and controls on the Query Access List Cache (RUN_QRYACCLIST) page.

Query Access List Cache

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

☐ **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.

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: When the **Enable Access List Cache** option is selected and roles of a user profile or permission list of a role has been modified, which affect the Query Access List Cache, you must rerun the QRYACCLIST AE process to properly update the cache. Otherwise, the Query Access List Cache is not up-to-date and will be switched off automatically.

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

Enforcing Row-Level Security

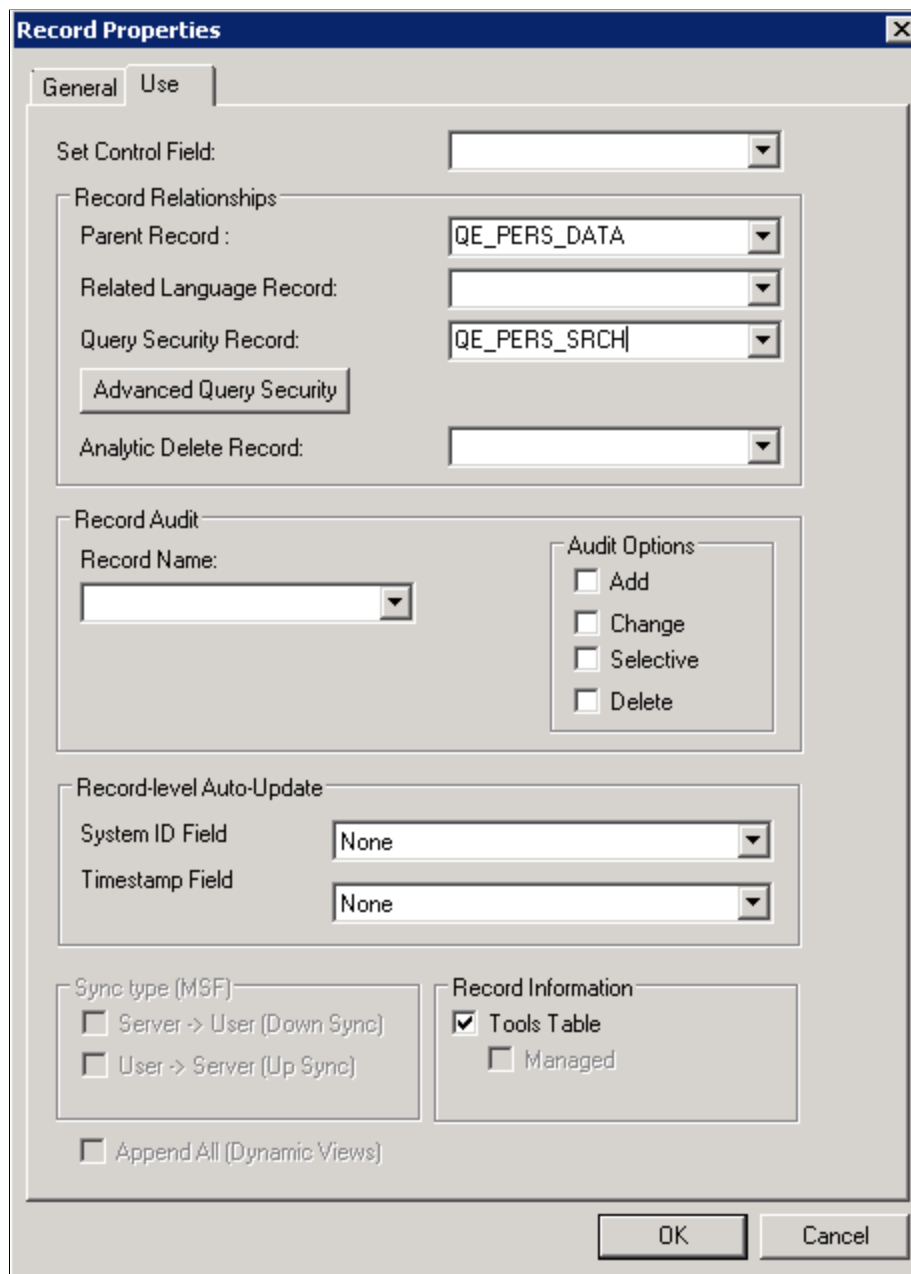
By default, when you give PeopleSoft Query users access to a record definition, they can access all the rows of data in the table that were built using the associated record definition. In some cases, though, you may want to restrict users from seeing some of those data rows. For example, you may not 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 on the Record Properties dialog box for any record definition.

This example illustrates the Record Properties dialog box - Use tab with the **Query Security Record** field is set to **QE_PERS_SRCH**.



The image shows the 'Record Properties' dialog box with the 'Use' tab selected. The 'Set Control Field' dropdown is empty. Under 'Record Relationships', 'Parent Record' is 'QE_PERS_DATA', 'Related Language Record' is empty, 'Query Security Record' is 'QE_PERS_SRCH', and 'Analytic Delete Record' is empty. There is a button for 'Advanced Query Security'. Under 'Record Audit', 'Record Name' is empty, and 'Audit Options' includes 'Add', 'Change', 'Selective', and 'Delete', all of which are unchecked. Under 'Record-level Auto-Update', both 'System ID Field' and 'Timestamp Field' are set to 'None'. Under 'Sync type (MSF)', 'Server -> User (Down Sync)' and 'User -> Server (Up Sync)' are unchecked, and 'Append All (Dynamic Views)' is also unchecked. Under 'Record Information', 'Tools Table' is checked and 'Managed' is unchecked. 'OK' and 'Cancel' buttons are at the bottom right.

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).

Note: These security criteria are applied for all definitions, including *multiple query security record* definitions and *single query security record* definitions.

When you add one of the preceding fields as a key field, 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.

See [Using Query Access Group Trees](#), [Using Query Profiles](#).

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.

Adding Multiple Query Security Records for a Record Definition

You are able to add multiple query security records for a record definition, including:

- Associating multiple query security records with a single record.
- Specifying the fields (including non-key fields from the query security record) and the base record that will be used to secure the data.

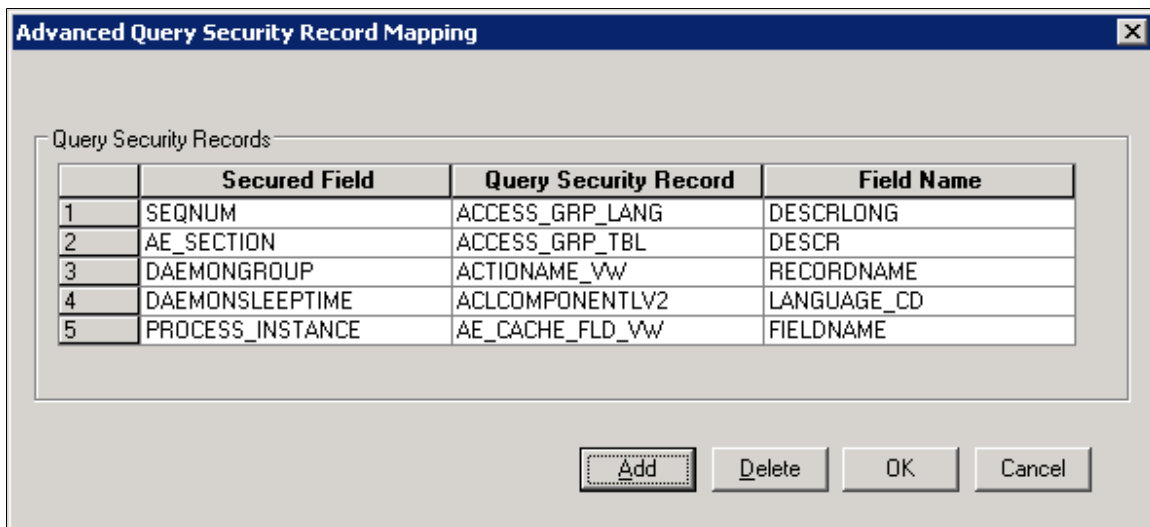
Adding Multiple Query Security Records for Record Definitions

Query Administrator uses the Advanced Query Security Record Mapping dialog box and the Add Query Security Record dialog box in Application Designer to add multiple query security records for a record definition. Note that each base record can have one query security record defined in the Record Property dialog box and as many as five additional query security records defined in the Advanced Query Security Record Mapping dialog box. When you add more than five query security records using the Advanced Query Security Record Mapping dialog box, an error message appears to alert you that the maximum limit has been reached.

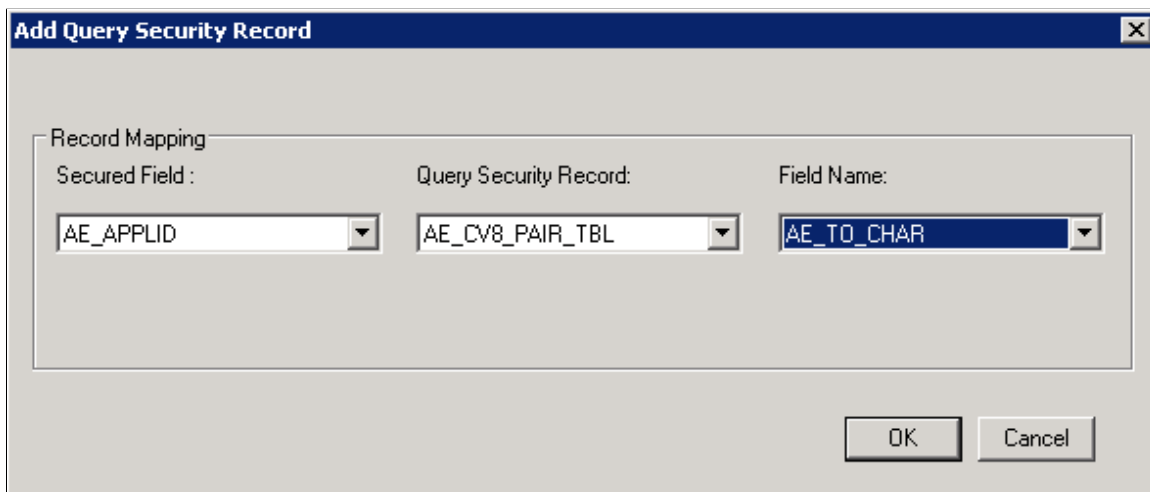
Navigation:

1. Open the Record Properties dialog box in Application Designer.
2. Click the **Advanced Query Security** button.
3. In the Advanced Query Security Record Mapping dialog box, click the **Add** button.

This example illustrates the Advanced Query Security Record Mapping dialog box in Application Designer.



This example illustrates the Add Query Security Record dialog box in Application Designer.



Field or Control	Description
Secured Field	Select a field from the available fields in the base record.
Query Security Record	Select a record that you have permission to access. Note: Dynamic views, derived or work records, subrecords, and temporary records cannot be used as query security records. These records are excluded from the Query Security Record drop-down list.
Field Name	Select a field from the selected query security record.

To add multiple query security records for record definitions:

1. In Application Designer, open the Record Properties dialog box.
2. Click the **Advanced Query Security** button.

The Advanced Query Security Record Mapping dialog box appears with the list of query security records that are already set to the current record.

3. Click the **Add** button to access the Add Query Security Record dialog box.
4. Use the Add Query Security Record dialog box to enter additional query security records and their corresponding field mappings.

Removing Query Security Records from Record Definitions

To remove query security records from record definitions:

1. In Application Designer, open the Record Properties dialog box.
2. Click the **Advanced Query Security** button.

The Advanced Query Security Record Mapping dialog box appears with the list of query security records that are already set to the current record.

3. Select a row in the Query Security Record section.
4. Click the **Delete** button.

A warning message appears.

5. Click the **Yes** button to confirm the deletion.

Using Query Profiles

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

Navigation:

PeopleTools > Security > Permissions and Roles > Permission Lists > Query tab > Query Profile

This example illustrates the fields and controls on the Security - Query Profile page.

Permission List: PTP1000	
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	

To use query profiles:

1. Select **PeopleTools > Security > Permissions and 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.

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

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.

If the **Allow Use of Any Join** option is not selected, query users cannot run the queries that use more than one record.

See [Understanding Query Administration](#), "Setting General Permissions" (Security Administration).

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 that you gave them access to PeopleSoft Query.

Related Links

“Defining Query Profiles” (Security Administration)

“Building Query Access Group Trees” (Security Administration)

“Working with Query Trees” (Security Administration)

“Defining Row-Level Security and Query Security Records” (Security Administration)

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.

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: Workflow queries are excluded from the statistics because of the large volume that can be run as part of workflow processing. Therefore, you should ensure that workflow queries are as efficient as possible.

You cannot cancel currently running scheduled queries.

Related Links

[Using Query Profiles](#)

Using Query Administration

Administering Queries

Use the Admin page (QRY_ADMIN) to administer queries.

Navigation:

PeopleTools > Utilities > Administration > Query Administration

This example illustrates the fields and controls on the Query Administration page.

The screenshot shows the 'Query Administration' page with tabs for 'Admin', 'Executing', and 'Settings'. Under the 'Admin' tab, there are two search methods: 'Choose a predefined search' and 'OR perform a manual search'. The predefined search section has a dropdown for 'Queries that have been run in the last (n) days', a field for '(n) = 10', and a 'Search' button. The manual search section has a 'Search by:' dropdown set to 'Query Name', a 'begins with' dropdown, and a text input field containing 'WFT', with a 'Search' button. Below these is a status line 'Search results for: Manual search - Query Name begins with WFT' and buttons for 'Check All' and 'Uncheck All'.

The 'Query List' section contains a table with the following columns: Select, Owner ID, Query Name, Folder, Avg Time, Avg Rows, # Runs, Last Run Date, Last Run Time, Logging, Disabled, View SQL, and View Log. The table lists 10 queries, all with an average time of 0.000, average rows of 0.000, and 0 runs. The queries are:

Select	Owner ID	Query Name	Folder	Avg Time	Avg Rows	# Runs	Last Run Date	Last Run Time	Logging	Disabled	View SQL	View Log
☐		WFT0001_TOTALS_BY_BP_WL		0.000	0.000	0			Off	No	View SQL	View Log
☐		WFT0001_TOTALS_BY_BP_WL1		0.000	0.000	0			Off	No	View SQL	View Log
☐		WFT0002_TOTALS_BY_BP_WL_OPR		0.000	0.000	0			Off	No	View SQL	View Log
☐		WFT0005_TOTALS_FOR_SINGLE_BP		0.000	0.000	0			Off	No	View SQL	View Log
☐		WFT0002_TOTALS_BY_BP_WL_OPR1		0.000	0.000	0			Off	No	View SQL	View Log
☐		WFT0003_OPERATOR_TOTALS1		0.000	0.000	0			Off	No	View SQL	View Log
☐		WFT0004_TOTALS_BY_BP_WL_AL_OP1		0.000	0.000	0			Off	No	View SQL	View Log
☐		WFT0003_OPERATOR_TOTALS		0.000	0.000	0			Off	No	View SQL	View Log
☐		WFT0004_TOTALS_BY_BP_WL_ALL_OP		0.000	0.000	0			Off	No	View SQL	View Log
☐		WFT0005_TOTALS_FOR_SINGLE_BP1		0.000	0.000	0			Off	No	View SQL	View Log

Below the table are two rows of action buttons: 'Logging On', 'Enable', 'Assign New Owner', 'Delete', 'Rename', 'Move to Folder', 'Clear Stats/Logs' and 'Logging Off', 'Disable', 'Copy to New Owner'.

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 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.
- **Copy to New Owner:** Copy ownership of selected queries from current user to another user. This action only applies to private queries.

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

Note: Your changes are saved automatically, and the **Save** button is not available.

Managing Currently Running Queries

Use the Executing page (QRY_KILL) to cancel currently running queries, and enable or disable queries and logging.

Navigation:

PeopleTools > Utilities > Administration > Query Administration > Executing

This example illustrates the fields and controls on the 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 administrators needs to verify that a query has been canceled, they can look in the Appsrv.log and verify that the *PSMONITORSRV* service has canceled the selected query.

To manage 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 and the **Save** button is not available.

The kill query (cancel query or time-out) 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 time-out 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 for 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

Use the Settings page (QRY_SETTINGS) set additional options such as enabling the query time-out feature and running query statistics.

Navigation:

PeopleTools > Utilities > Administration > Query Administration > Settings

This example illustrates the fields and controls on the Settings page. Definitions for the fields and controls appear following the example.

Admin	Executing	Settings
☒ Enable Query Timeout ☐ Run Query Statistics ☐ Query Data Masking Query Column Mask: *		

Field or Control	Description
Enable Query Timeout	Select or clear this check box to enable or disable the query time-out feature on a system-wide basis. The time-out 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. By default, the query statistics feature is <i>disabled</i>. PeopleSoft recommends that you use the query statistics feature only for analysis and that you do 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 time-outs or may return query results with zero values. This recommendation also applies to users of queries in reports.
Query Data Masking	Select or clear this check box to enable or disable data masking for query. Using Data Privacy Framework, you can set the length of unmasked characters. This partial masking does not apply if the query returns a value that is shorter than the length of unmasked character setting. Partial masking also does not apply to long character and image fields, which are displayed as a single masked character. See “Data Privacy Framework” (Security Administration).

<i>Field or Control</i>	<i>Description</i>
Query Column Mask	Set the data masking character. If data masking is defined for this query, the mask defined here is applied to data values when this query is used as a data source by: • BI Publisher • Composite Query • Connected Query • Feed Publishing Framework • nVision • Pagelet Wizard • PeopleSoft Search Framework • Pivot Grid • Query Access Service (QAS) • Tile Wizard See “Data Privacy Framework” (Security Administration).