# Table of Contents
(Updated for Intro to Query – Part 3)

**Navigating to the Query Manager Search Page** ............................................................... 5
   Exercise 1—How to Navigate to the Query Manager Search Page

**Understanding Public and Private Queries** ................................................................. 7

**Terms and Buttons Used with the Query Tool** .............................................................. 8

**Finding All Existing Queries** ....................................................................................... 8
   Exercise 2—How to Find All Existing Queries

**Finding and Running an Existing Query** ..................................................................... 9
   Exercise 3—How to Find and Run an Existing Query

**Creating a New Query** ................................................................................................. 12
   Exercise 4—How to Create a New Query

**Pages Used to Create a Query** ..................................................................................... 17

**Adding New Criteria to a Field in a Query** ................................................................. 18
   Exercise 5—How to Add New Criteria to a Field in a Query

**Adding a New Field to a Query** .................................................................................. 20
   Exercise 6—How to Add a New Field to a Query

**Using Other Condition Types** .................................................................................... 22
   Exercise 7—How to Use Other Condition Types

**Using Wildcards** ........................................................................................................... 25
   Exercise 8—How to Use a Wildcard

**Using Logical Operators to Related Multiple Criteria** .............................................. 28
   Exercise 9—How to Change Relations between Multiple Criteria

**Using a Prompt** ............................................................................................................. 30
   Exercise 10—How to Run an Existing Query That Uses a Prompt
   Exercise 11—How to Insert a Prompt into a Query

**Joining Tables** ............................................................................................................ 35
   Exercise 12—How to Join Tables
   —Adding Criteria for SET ID ....................................................................................... 38
   —Reordering Criteria ................................................................................................. 40
   —Grouping Criteria .................................................................................................. 42
   —Changing a Column Label ...................................................................................... 43

**Reordering Fields** ....................................................................................................... 45
   Exercise 13—How to Reorder Fields
8. The **Criteria** tab should look like this:

![Criteria Tab Example]

9. Click the **Run** tab.

![Run Tab Example]

**Reordering Criteria**

The above results include Accounts with a **Status** of “I”, even though one criterion says EFF_STATUS equal to “A”. The order of the criteria caused this problem; in this case it was the placement of the “OR condition”. The EFF_STATUS criterion must be moved above the ACCOUNT criterion that has the OR condition.

10. Click on **Criteria** tab and click **Reorder Criteria** button

![Reorder Criteria Example]
11. In the **Edit Criteria Ordering** page, move the **A.EFF_STATUS** criterion by typing **2** in **New Position**

12. Click **OK**

13. The **Criteria** tab should look like this:

14. Click the **Run** tab  (compare with results on page 40, #9)

Note that the **Status** column contains some rows with I (Inactive) when one criterion states **EFF_STATUS** equal to **A**.

*There is a problem with the criteria!*
Grouping Criteria

15. Click the Criteria tab

16. Click the Group Criteria button

17. Add parenthesis as shown below to group the criteria for ACCOUNT_TYPE and ACCOUNT.

18. Click OK

19. Click the Run tab

20. Grouping the criteria has solved the problem. Note the number of rows returned is far less than on the bottom of page 41.

21. Click Fields tab, Save As link, and OK button to save your query.
Changing a Column Label

22. Click the **Fields** tab.

23. Click the **Edit** button across from the **A.DESCR - Description** entry.

24. On the **Edit Field Properties** page:
   - **Heading** box - click the radio button for **Text**
   - **Heading Text** field - delete the existing text and type: **Account Description**
   - Click **OK**

25. Click the **Run** tab.

Note how long it takes the query to run.
You should see a page similar to the following:

26. Click the **Fields** tab and click the **Save As** link.

27. Highlight the existing text in the **Query name** field. Type: **xxx_class_joins** (where **xxx** represents your initials).

28. Click **OK**.

---End of Exercise---
Reordering Fields
You can easily arrange the order of rows and columns as you would like them to appear when you run a query. In the following exercise, you will follow steps to reorder fields in the query you are creating.

Exercise 13—How to Reorder Fields

1. If necessary, click the Fields tab. You should see a page similar to the following:

![Fields tab page](image)

2. Click the Reorder/Sort button.
   You should see the Edit Field Ordering page similar to the following:

![Edit Field Ordering page](image)
The first column labeled **New Column** determines the left to right order of the columns.

3. Type the values 1, 2 and 3 in this column as shown in the following sample page:

The right column labeled **New Order By** determines how to sort rows of data.
(Note: PS sorts numbers before alpha characters.)

4. Sort the rows so that is **A.EFF_STATUS – Status as of Effective Date** the first row and **A.ACCOUNT - Account** is the second row by typing the values as shown below:

5. Click **OK**.
6. Click on Criteria tab

7. Remove the criterion for **A. EFF_STATUS equal to A** using the delete button.

8. Click the Run tab.

9. You should see a page similar to the following results.

Note that the columns are now in a new order and that the rows of data are sorted by Status (A’s first and then I’s) and then by Account.

10. Click the Fields tab.

11. Click the Save As link.

12. Click OK.

--End of Exercise--
Aggregate Functions and Having Criteria

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, PS Query collects related rows and displays a single row that summarizes their contents.

For example, you might want to sum the Amount for each Chartfield1 (Purpose) in the UOD_TRANS_DTL record. That is, you want your results to have one row for each unique Purpose and to display the sum of Amount for each Purpose. You would not want multiple rows for each Purpose, even though the UOD_TRANS_DTL record has many such multiple rows.

Exercise 14—How to Use Aggregate Functions, Part 1 (Using “Sum”)

In this exercise, you will create a new query to illustrate a simple use of the Aggregate function. You will sum the Amount for each Purpose in the UOD_TRANS_DTL record.

1. Navigate to the Query Manager Search page. (Click Reporting Tools, then click Query Manager)
2. Click the Create New Query link

   ![Query Manager Screenshot]

3. The Find an Existing Record Search page will appear
4. In the Search For field, type: UOD_TRANS and then click Search.
5. Click the Add Record link for the record named UOD_TRANS_DTL

   ![Find an Existing Record Screenshot]

   UOD_TRANS_DTL table contains transaction details
   UOD_TRANS_NOTEB table contains the Trans Tag data entered via UDataGlance
6. A list of fields in the record will be displayed. Click the check box next to the following 7 fields:
   - **FISCAL_YEAR** – Fiscal Year
   - **ACCOUNTING_PERIOD** – Accounting Period
   - **ACCOUNT** - Account
   - **CHARTFIELD1** – Purpose
   - **LEDGER** – Ledger (not shown in picture, you will have to scroll down.)
   - **AMOUNT** – Amount (not shown in picture, you will have to scroll down.)
   - **UOD_CHRTFLD1_DESCR** – Description (not shown in picture, you will have to scroll down.)

7. Click the **Fields** tab to confirm that the seven fields have been added.
8. Click the **Criteria** tab.
9. Click the **Add Criteria** button.

Note - This is the alternative way to add criteria, especially when a field was NOT selected in the Query tab to display in your query results.
10. In the **Choose Record and Field** box, click the magnifying glass.

11. You should see a page that looks this:

12. Click the **A.BUSINESS_UNIT - Business Unit**.

13. Keep the **Condition Type** field as “equal to.”

14. In the **Define Constant** box, type: **UOD01**. Your page should look like this:

15. Click **OK**
Your Criteria page will look like this:

16. Click on the Fields tab, you will be adding criteria for these three fields:
   - Fiscal Year
   - Accounting Period
   - Chartfield1 – Purpose

17. The following are examples of adding criteria to the three fields:
For the Purpose criterion:

- **Condition Type** – select like
- **Define Constant** – enter a partial Purpose code with the wildcard % so that your results may have multiple Purpose codes (Enter a Purpose for which you have view access!)

**IMPORTANT NOTE!**
Define Constant – do not enter MAST112%, type a Purpose you have access to.

18. Click the **Run** tab. Your results will be different (though similar) to this:

Note the number of rows that are returned. If you scroll through the data, you will see multiple rows with the same Purpose and Account. You may also see multiple values in the Ledger column (ACTUALS, BEGBUD).
19. Click the **Fields** tab and then click the **Edit** button on **A.AMOUNT - Amount**.

![Fields Tab](image1)

20. You should see a page like this. In the **Aggregate** box, click **Sum**.

21. Click **OK**

![Edit Field Properties](image2)

22. Click the **Run** tab. Your page should look like this:

![Run Tab](image3)

Note that now there is only one row for each **Purpose/Account /Ledger** combination and there are fewer rows returned than in the previous exercise.

23. Click on **Fields** tab and then **Save As** link.

24. In the Query name type: **xxx_class_aggr_sum** (where **xxx** represents your initials). Click **OK**.
Exercise 15—How to Use Aggregate Functions, Part 2 (Using “Count”)

In this exercise, you will use the aggregate function in a query with more fields. If you want to group your data by account and see subtotals of total amount for each fiscal year and accounting period combination, you would use the following steps:

1. You should be in the query named xxx_class_aggr_sum (where xxx represents your initials). If not, navigate to the Query Manager Search page and enter your initials the Search For field and click the Search button. Select the query from the list by clicking on the name.

2. Click the Criteria tab. You should see a page similar to the following:

3. Edit the criteria on the A.ACCOUNTING_PERIOD – Accounting Period field by clicking the Edit button on that criterion.

4. Change the criteria properties to match the following:

   This criterion will return results for all accounting periods (1-12 and both adjustment periods, 991 and 992).
5. Click the Run tab

Note the number of rows that are returned. Also note the multiple rows for some Account values.

6. Click the Fields tab.

7. Click the Edit button on the ACCOUNTING_PERIOD – Account Period row.

8. You should see the Edit Fields Properties page.

9. In the Aggregate box, click Count.

10. Click OK
11. Click the Run tab. Note that you now have fewer rows returned.

You now have one row for each unique combination of Fiscal Year, Accounting Period, Ledger and Purpose. In other words, you have grouped by FISCAL_YEAR, ACCOUNTING_PERIOD, LEDGER and PURPOSE to get a total amount.

Note:
The results show a count of the number of Accounts used in transactions (instead of the returning the values of Account); one row for each unique combination of Purpose, Fiscal Year, Accounting Period and Ledger.

12. Click the Fields tab

13. Click the Save As link.

14. In the Query name field and type: xxx_class_aggr_count (where xxx represents your initials).

15. Click OK.

---End of Exercise---
Using PS “Having” Criteria
Having is specifically used when a criterion is added to an aggregated field, such as a sum. Suppose you only wanted to see rows for accounts where the Sum Amount was greater than zero. You want to put criteria on an aggregated field. PeopleSoft calls this condition “Having Criteria.”

Exercise 16—How to Use Having Criteria

1. If necessary, click the Fields tab.
2. Click the Add Criteria icon on of the A.AMOUNT - Amount row.
3. Click the drop-down arrow next to Condition Type and click greater than.
4. In the Define Constant box, type: 0.
5. Click OK.
6. Click the Criteria tab.
Note: This criterion does NOT appear on the Criteria page.

7. Click the Having tab.

Note: This criteria DOES appear on the Having page. Criteria on aggregated fields appear on this page.

8. Click the Run tab. (Sometimes adding “Having Criteria” will give you fewer rows of data.)

Notice that the Sum Amount column only contains rows where the amounts are greater than 0.

9. Click the Fields tab and click the Save As link.

10. Click OK.

--End of Exercise--
Defining Expressions

Query Manager allows you to create expressions two different ways: by adding criteria and by defining your own in the Expressions tab. You will use the Expression tab when you need to do more than is available in the Criteria Properties dialog box.

We will look at the following four types of expressions:

- Numerical manipulation
- Substring
- Concatenate
- Decode

Numerical Manipulation

If you want to add a column to your query that shows a 5% increase in total amount, you would use the following steps:

**Exercise 17—How to Use Numerical Manipulation**

1. Click Query Manager in the Navigation bar
2. Click the Create New Query link
3. Find an Existing Record – in the begins with field, type: `UOD_T` and then click Search
4. Click the Add Record link on the first record, `UOD_TRANS_DTL` – UOD Transaction Detail GL

This is one of the key reporting tables (records) in UD Financials.
5. A list of the 50 fields in the record will be displayed. Select the following 7 fields:
   - FISCAL_YEAR – Fiscal Year
   - ACCOUNTING_PERIOD – Accounting Period
   - ACCOUNT - Account
   - DEPTID - Department
   - FUND_CODE - Fund Code
   - CHARTFIELD1 - Purpose
   - AMOUNT – Amount (you must scroll down)

6. Click the Fields tab and click the Save As link.

7. In the Query field, type: xxx_class_expressions (xxx represents your initials).

8. Click OK.
8. Add Criteria for the following fields:
   - **Fiscal Year** equal to 2014
   - **Accounting Period** equal to 4
   - **CHARTFIELD1 - Purpose** equal to a Purpose on which you are an Administrator (a Purpose you can view or approve). For example ADMN 112114 (the letters must be UPPER CASE).

![Image of query tool with fields added]

9. Click the **Expressions** tab. And then click the **Add Expression** button.

![Image of expressions tab with Add Expression highlighted]

10. You will see a page like this:

    ![Image of edit expression properties]

    **Edit Expression Properties**
    
    **Expression Type:** Character
    
    **Expression Text:**

    
    ![Add Prompt, Add Field, OK, Cancel buttons]
11. In the Expression Type box, select Signed Number

12. Change the Length field to 15

13. Change the Decimals field to 2

14. Click the Add Field link

15. Scroll down to find the A.AMOUNT - Amount link and then click on it.
16. You will be back at the Edit Expressions Properties page, where you’ve added **A.AMOUNT** to the **Expression Text** box:

![Edit Expression Properties](image)

17. At the end of the existing text in the **Expression Text** box, type: *\( \ast 1.05 \)*

This will add 5% to the amount.

![Edit Expression Properties](image)

18. Click **OK**.

19. Click the **Use as Field** link

This expression is now treated like any other field; you can put criteria on it, rename it, etc. This will take you to the **Fields** tab.
20. Note that you have a new field called **A.AMOUNT*1.05**.

21. Click the **Edit** button for this field.

22. Verify that the **Heading box** is set to **Text**.

23. In the **Heading Text** field delete the existing text and type: **5% Projected Increase**

24. Click **OK**. Click the **Run** tab. You should see a page similar to the following:
25. Click the **Fields** tab.

26. Click the **Save As** link. (If you have already done so, name the query **xxx_class_expressions**, where **xxx** represents your initials). Click **OK**.

---End of Exercise---

**Substring**

You can create a field that includes only certain digits of an existing field by using the substring expression. In the next exercise, you will use a substring expression to view digits 5 and 6 of the **Chartfield1 - Purpose** field.

**Exercise 18—How to Use the Substring Expression**

1. From the **Query Manager** “Find an Existing Query” page, open the query named **XXX_CLASS_AGGR_SUM** (where **XXX** represents your initials).

2. Click on the **Criteria** tab and click on the **Edit** button on the **A. CHARTFIELD1 – Purpose** row.

![Edit Criteria Properties](image)

3. Change the value in the Constant field to **XXXX%** (where **XXXX** represent the acronym of the Purpose(s) for which you have administrator access rights).

4. Verify that the **Condition Type** is “like.” And click **OK**.
5. Click the **Expressions** tab
6. Click the **Add Expression** button

![Screenshot of the Query Tool interface showing the Expressions tab, Add Expression button, and the Add Field link]

7. In the **Expression Type**, click **Character** if it is not already selected
8. Change the **Length** to **2**
9. Click the **Add Field** link

![Screenshot of the Edit Expression Properties window showing Character as the expression type and Length set to 2]

10. Click **A.CHARTFIELD1 - Purpose**

![Screenshot of the Select a field window showing A.CHARTFIELD1 - Purpose highlighted]
You will create an expression to extract the 5th and 6th characters from the Purpose codes.

11. Click in the Expression Text box and type this in front of A.CHARTFIELD1: %substring ( 

12. Type this after A.CHARTFIELD1: , 5, 2)

This text tells Query to start at the 5th character of A.CHARTFIELD1 and to extract two characters. Your page should look like this:

```
Note: There are NO spaces in the expression.
```

13. Click OK.

14. Click the Use as Field link.

15. You will be on the Fields tab, note the new field in the list. Click the Edit button for %substring(A.CHARTFIELD1,5,2)
16. In the Heading Text box, change the text to **Purpose 5, 6**

![Edit Field Properties](image)

17. Click OK.

18. Click the Save As link.

19. Rename this query `xxx_class_substring` (where `xxx` represents your initials).

20. Click OK.

21. Click the Run tab.

![Run Tab](image)

---End of Exercise---
Concatenate (combines multiple fields into one)

Using the concatenate expression, you can see the Fiscal Year and Accounting Period fields together as one field.

Exercise 19—How to Concatenate Fields

1. Open the query named XXX_CLASS_AGGR_SUM (where XXX represents your initials)
2. Click the Expressions tab
3. Click the Add Expression button

4. In the Expression Type box, choose Character if it is not already selected
5. Change the Length to 15.
6. Click the Add Field link.
7. Click **A.FISCAL_YEAR - Fiscal Year**

8. In the **Edit Expression Properties** page, click the **Add Field** link again.

9. This time click **A.ACCOUNTING_PERIOD - Accounting Period**.

10. In the **Expression Text** box, type: `concat` between the two field names as shown below.

11. Click **OK**.
12. Click the **Use as Field** link

13. This will take you to the **Field** tab

14. Click the **Edit** button for the new field of **A.FISCAL_YEAR %concat A.ACCOUNTING_PERIOD**.

15. In the **Heading Text** box, change text to: **FY AcctgPeriod**

16. Click **OK**.
17. Click the **Save As** link.

18. In **Query** field, rename this query **xxx_class_concat** (where **xxx** represents your initials).

19. Click **OK**.

20. Click the **Criteria** tab.

21. Make sure the criteria on CHARTFIELD1, FISCAL_YEAR and ACCOUNTING_PERIOD are limited to one or just few values. This query uses the UOD_TRANS_DTL record, selecting too many values will have an adverse effect on the system resources.

22. Click the **Run** tab

Note that this new concatenated field is difficult to read. See the next page for an alternative that makes it more understandable.
Note: The following is an alternative way of writing a concatenation expression. It will also demonstrate adding a dash (-) in between the two fields to make the new field easier to read.

23. Click on the **Expressions** tab

24. Click the **Edit** button on the **A.FISCAL_YEAR %CONCAT A.ACCOUNTING_PERIOD** row.

25. Omit the `%concat` and replace it with `||` on either side of a dash in single quotes.

   Your expression will now be **A.FISCAL_YEAR || ' - ' || A.ACCOUNTING_PERIOD** –

   There are spaces before and after both sets of the `||`.

26. Click the **OK** button.

27. Click the **Run** tab. Notice that the new concatenated field now has a dash in it.

28. Go to **Fields** tab, click **Save As** link and click **OK**

---End of Exercise---
Decode ("if" statements)

Decode allows you to create a field whose value is conditional upon a logical expression. For example, you may want to create a field that is populated with Amount under certain conditions and is blank under other conditions. The general format is the following:

DECODE (statement to evaluate, thing to evaluate statement against, value if true, value if false).

Exercise 20—How to Use Decode

In this exercise, we will create a field called "basic budget amount." If the Fund is OPBAS (Operating Basic Budget), then return the Amount. Otherwise, return zero.

1. Go to Query Manager and open XXX_CLASS_SUBSTRING (where XXX represents your initials)
2. Click the Query tab click the show Fields icon to display the fields
3. Click on the FUND_CODE – Fund Code check box to add this field to your query

4. Click the Criteria tab
5. Change two criteria by clicking the Edit buttons:
   - Accounting Period to equal to 2
   - Purpose to like with your acronym with the % wildcard (e.g. UNIV%)
6. Click the **Expressions** tab and then click the **Add Expression** button

7. In **Expression Type** select **Number**

8. Change **Length** to 15 and **Decimals** to 2.

In the **Expression Text** box, type: `decode(A.FUND_CODE,'OPBAS',A.AMOUNT,0)`

9. Click **OK**.

10. Click the **Use As Field** link for the new field `decode(A.FUND_CODE,'OPBAS',A.AMOUNT,0)`.

11. This opens the **Fields** tab
12. Click the **Edit** button for `decode(A.FUND_CODE,'OPBAS',A.AMOUNT,0)`.

![Image of Query Tool with the decode function highlighted]

13. In the **Heading Text** box, change the text to: **Basic Bgt Amt**

![Image of Edit Field Properties with the heading text set to 'Basic Budget Amt']

14. Click **OK**

15. Click the **Run** tab.

**OOOOOPS – an error!**

This “group function” error means there’s a problem with a sum on one of the fields.

A SQL error occurred. Please consult your system log for details. Error in running query because of SQL Error, Code=934, Message=ORA-00934, group function is not allowed here (50,380)
16. Click the **Fields** tab

The problem is the **Sum** on the A.AMOUNT field - it conflicts with the decode field and is not needed, since the decode expression also involves the A.AMOUNT field.

17. Delete the A.AMOUNT field with the delete button

18. Add the sum to the “decode” field instead – click the **Edit** button on the “DECODE” field

19. In the **Aggregate** box, click **Sum**

20. Click **OK**

21. Click the **Run** tab
Notice only the rows with the Fund Code of OPBAS have an amount in the Basic Budget Amt column.

22. Click the Save As link.

23. In Query field, rename this query xxx_class_decode (where xxx represents your initials).

24. Click OK.

---End of Exercise---

Running Query Results to Excel
You can run results from queries to Microsoft Excel. In the next exercise, you will run your query results from the previous exercise to Excel. There are three ways to download query results to Excel:

- Query Viewer search page
- Query Manager search page
- Run tab in Query Manager

Exercise 21—How to Run Query Results to Excel from Query Viewer or Query Manager

1. Open Query Manager or Query Viewer

2. Find the query you want to download and click the Excel link

Query Viewer search page:
3. When this dialog box appears, click **Save**

4. Click **Open** when this message appears at the bottom of your screen:

5. Save this new Excel document and rename it something meaningful to you.
Run tab in Query Manager:

1. From the Query Manager search page, click the **Edit** link on the query you want to download

![Query Manager](image)

2. Click the **Run** tab and then click the **Download to Excel** link

![Run tab](image)

3. When this dialog box appears, click **Save**

![Save dialog box](image)

4. Click **Open** when this message appears at the bottom of your screen:

![Download completion](image)

5. Save this new Excel document and rename it something meaningful to you.

---End of Exercise--
Using the Query Viewer

The Query Viewer is a read-only version of the Query Manager. It allows Security Administrators to provide read-only access to users who only need to view or print queries.

The Query Viewer enables you to do the following:
- Search for a query
- Preview a query
- Run a query
- Print a query

To Use the Query Viewer to Search for a Query
Log in to PS as you normally do.
From the Menu box, click Reporting Tools.
Click Query.
Click Query Viewer.
In the Search For field, type the name of the query you want to find.

To Use the Query Viewer to Preview a Query
When you preview a query, the results are displayed in the current browser window.
Log in to PS as you normally do.
From the Menu box, click Reporting Tools.
Click Query.
Click Query Viewer.
In the Search For field, type the name of the query you want to find.
Click the name of the query you want to view.
Download the results to an Excel spreadsheet.

To Use the Query Viewer to Run a Query
When you run a query, the results are displayed in a new browser window.
Log in to PS as you normally do.
From the Menu box, click Reporting Tools.
Click Query.
Click Query Viewer.
In the Search For field, type the name of the query you want to find.
Click the HTML link to run the query.
Download the results to an Excel spreadsheet.

To Use the Query Viewer to Print a Query
Log in to PS as you normally do.
From the Menu box, click Reporting Tools.
Click Query.
Click Query Viewer.
In the Search For field, type the name of the query you want to find.
Run the query.
Click the Print button for the browser program you use. (Or, select File | Print from the browser’s Menu bar.) The query will print on your default printer.

If you choose to download the query to Excel or another program, you can print the query using that program’s print functions.
## Appendix

**Terms and Buttons Used with Fields** (from PeopleBooks online documentation)

<table>
<thead>
<tr>
<th>Button</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Sort button" /></td>
<td>Click the Sort button once to list fields in alphabetical order. Click the button again to return to original sort.</td>
</tr>
<tr>
<td>Alias</td>
<td>The alias name that the program automatically assigns to the chosen records.</td>
</tr>
<tr>
<td>Hierarchy Join</td>
<td>Click this link to join a child table to its parent table.</td>
</tr>
<tr>
<td>Check All Fields</td>
<td>Click this button to check all fields in the record. Once you select a field, the program 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.</td>
</tr>
<tr>
<td>Uncheck All Fields</td>
<td>Click this button to clear all fields in the record.</td>
</tr>
<tr>
<td>Field Names</td>
<td>Select the box located to the left of each field that you want to add to your query content.</td>
</tr>
<tr>
<td>Related Record Join</td>
<td>Click this link to join two records based on a shared field.</td>
</tr>
<tr>
<td>Expand All Records</td>
<td>Click this button to view all fields in the records. This button appears only when there is more than one record listed.</td>
</tr>
<tr>
<td>Collapse All Records</td>
<td>Click this button to hide all fields in the records. This button appears only when there is more than one record listed.</td>
</tr>
<tr>
<td>Format</td>
<td>Field type and length for each field listed.</td>
</tr>
<tr>
<td>Ord (order)</td>
<td>Shows one or more fields selected to sort your query output. If the field is the first sort field, a 1 appears, and the program sorts rows based on this field first. The second sort field selected is numbered 2, and so on. A descending sort order can also be specified. The letter D appears if sorting fields in descending order is selected.</td>
</tr>
<tr>
<td>XLAT (translate)</td>
<td>Specifies which translate value you want to appear in the query results: N (none), S (short), or L (long). The table you're querying may include fields that use the Translate table. If so, the field itself contains a short code of some kind, for which the Translate table provides a set of corresponding values. For example, if the table includes an EFF_STATUS field, the value is A or I, which the Translate table translates into Active and Inactive. If a field has values on the Translate table, a letter appears in the XLAT column for that field. In your query results, you might want to display the translated value rather than the code (for example, <em>Active</em> instead of A). To tell PS Query to make this substitution specify L as the translate value. Translate tables are effective-dated, so you must select which effective date to use for it. For most tables, PS 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, PS Query uses the value in the EFFDT field for a row. That is, for each row the query returns, PS 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: • If the table you're querying includes another date field, you can use the value in that field as the effective date for Translate table values. Click the Edit button and then select the Field option, and then select the field name from the drop-down list box. • Use an expression to set the effective date for the Translate table. For example, enter a fixed effective date or prompt the user for one.</td>
</tr>
<tr>
<td>Agg (aggregate)</td>
<td>Aggregate function for each field listed.</td>
</tr>
<tr>
<td>Heading Text</td>
<td>The heading assigned to appear at the top of the column for the query output for each field listed.</td>
</tr>
<tr>
<td>Edit</td>
<td>Click this button to format the query output (for example, to change column headings, display translate table values in place of codes, or specify a sort order).</td>
</tr>
<tr>
<td>ReOrder/Sort</td>
<td>Click this button to display the Edit Field Ordering page, which enables you change the column order and/or sort order for multiple fields.</td>
</tr>
</tbody>
</table>
Standard Criteria used with UDO_TRANS_DTL Table

This query, EZQ_TRANS_NONBUDPURPNOPO, was written to return transactions for a given Purpose for a range of accounting periods. It excludes budget entries and Purchase Order transactions that are not yet expenses.

This is what the prompts look like:

These are the explanations for the six “standard” criteria:

- **STATISTICS_CODE not in list ‘ENU’, ‘ENP’** - This excludes any transaction used to record endowment “units”.
- **ACCOUNTING_PERIOD not equal to 0** and **ACCOUNTING_PERIOD not equal to 999** - These two criteria exclude the two accounting periods used in the system fiscal year end close process.
- **LEDGER equal to ACTUALS** or **LEDGER equal to ‘ ’ (blank)** - These two criteria ensure that the results do not include budget transactions.
- **JOURNAL_ID not equal to ‘ ’ (blank)** - This excludes Purchase Order transactions that create just obligations, but not actual expenses. (As a PO is expensed the transactions will be in the results because the Ledger will be ACTUALS.)