

Table of Contents

(Updated for Intro to Query – Part 3)

<u>Navigating to the Query Manager Search Page</u>	5
Exercise 1—How to Navigate to the Query Manager Search Page	
<u>Understanding Public and Private Queries</u>	7
<u>Terms and Buttons Used with the Query Tool</u>	8
<u>Finding All Existing Queries</u>	8
Exercise 2—How to Find All Existing Queries	
<u>Finding and Running an Existing Query</u>	9
Exercise 3—How to Find and Run an Existing Query	
<u>Creating a New Query</u>	12
Exercise 4—How to Create a New Query	
<u>Pages Used to Create a Query</u>	17
<u>Adding New Criteria to a Field in a Query</u>	18
Exercise 5—How to Add New Criteria to a Field in a Query	
<u>Adding a New Field to a Query</u>	20
Exercise 6—How to Add a New Field to a Query	
<u>Using Other Condition Types</u>	22
Exercise 7—How to Use Other Condition Types	
<u>Using Wildcards</u>	25
Exercise 8—How to Use a Wildcard	
<u>Using Logical Operators to Related Multiple Criteria</u>	28
Exercise 9—How to Change Relations between Multiple Criteria	
<u>Using a Prompt</u>	30
Exercise 10—How to Run an Existing Query That Uses a Prompt	30
Exercise 11—How to Insert a Prompt into a Query	31
<u>Joining Tables</u>	35
Exercise 12—How to Join Tables	35
—Adding Criteria for SET ID	38
—Reordering Criteria	40
—Grouping Criteria	42
—Changing a Column Label	43
<u>Reordering Fields</u>	45
Exercise 13—How to Reorder Fields	

<u>Aggregate Functions and Having Criteria</u>	48
Exercise 14—How to Use Aggregate Functions, Part 1 (Sum)	48
Exercise 15—How to Use Aggregate Functions, Part 2 (Count)	54
<u>Using PS “Having” Criteria</u>	57
Exercise 16—How to Use Having Criteria	
<u>Defining Expressions</u>	59
Exercise 17—How to Use Numerical Manipulation	59
Exercise 18—How to Use the Substring Expression	65
Exercise 19—How to Concatenate Fields	69
Exercise 20—How to Use Decode	74
<u>Running Query Results to Excel</u>	78
Exercise 21—How to Run Query Results to Excel	
<u>Using the Query Viewer</u>	81
<u>Appendix</u>	82
Terms and Buttons Used with Fields	82
Standard Criteria used with UDO_TRANS_DTL Table	83

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

Query Name: ELLELL_CLASS_CRITERIA Description: query class exercise

Buttons: 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.ACCOUNT_TYPE - Account Type	equal to	E	Edit	-
OR	A.ACCOUNT - Account	like	14%	Edit	-
AND	A.EFF_STATUS - Status as of Effective Date	equal to	A	Edit	-
AND	A.SETID - SetID	equal to	B.SETID - SetID	Edit	-

Buttons: Save, Save As, New Query, Preferences, Properties, Publish as Feed, New Union, Return To S

9. Click the **Run** tab.

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

First 1-100 of 752 Last

	SetID	Account	Eff Date	Status	Type	Descr	Short Desc	SetID	Descr
1	UOD01	120200	01/01/1951	A	E	PROFESSIONAL STAFF FULL-TIME	PROF FT	UOD01	Expense
2	UOD01	120201	11/11/2004	I	E	(D)DO NOT USE, USE 120200	PROF FT	UOD01	Expense
3	UOD01	120299	01/01/1951	A	E	COMPENSATED ABSENCES	COMP ABSEN	UOD01	Expense
4	UOD01	120300	01/01/1951	A	E	PROFESSIONAL STAFF PART-TIME	PROF PT	UOD01	Expense
5	UOD01	120400	01/01/1951	A	E	SUPPLEMENTAL PAY - PROFESSIONA	SUPPL PR	UOD01	Expense
6	UOD01	120500	01/01/1951	A	E	OFF-CAMPUS - PROFESSIONAL	OFF-CMP PR	UOD01	Expense
7	UOD01	120700	01/01/1951	A	E	DISABILITY PAY PROFESSIONALS	DISABILITY	UOD01	Expense
8	UOD01	120800	05/04/2010	A	E	POST DOC/FACULTY FELLOW	POSTDOC	UOD01	Expense

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

Query Name: ELLELL_CLASS_CRITERIA Description: query class exercise

Buttons: 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.ACCOUNT_TYPE - Account Type	equal to	E	Edit	-
OR	A.ACCOUNT - Account	like	14%	Edit	-
AND	A.EFF_STATUS - Status as of Effective Date	equal to	A	Edit	-
AND	A.SETID - SetID	equal to	B.SETID - SetID	Edit	-

11. In the **Edit Criteria Ordering** page, move the **A.EFF_STATUS** criterion by typing **2** in **New Position**
12. Click **OK**

Edit Criteria Ordering

Reorder criteria by entering position numbers on the left. Rows left blank or assigned a 0 will be automatically assigned a position.

New Position	Position	Expression1	Condition Type	Expression 2
	1	A.EFFDT - Effective Date	Eff Date <=	Current Date
	2	A.ACCOUNT_TYPE - Account Type	equal to	E
	3	A.ACCOUNT - Account	like	14%
2	4	A.EFF_STATUS - Status as of Effective Date	equal to	A
	5	A.SETID - SetID	equal to	B.SETID - SetID

OK Cancel

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

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

Query Name: ELLELL_CLASS_CRITERIA Description: query class exercise Feed

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.EFF_STATUS - Status as of Effective Date	equal to	A	Edit	-
AND	A.ACCOUNT_TYPE - Account Type	equal to	E	Edit	-
OR	A.ACCOUNT - Account	like	14%	Edit	-
AND	A.SETID - SetID	equal to	B.SETID - SetID	Edit	-

Save Save As New Query Preferences Properties Publish as Feed New Union Return To

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

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

View All | Rerun Query | Download to Excel | Download to XML First 1-100 of 579 Last

	SetID	Account	Eff Date	Status	Type	Account Description	Short Desc	SetID	Account Type Descr
1	UOD01	140000	01/01/1951	A	E	(BUDGET ONLY) SUPPLIES & EXP	S & E BUD	UOD01	Expense
2	UOD01	140101	01/01/1951	A	E	(D)DO NOT USE, USE 140100	ATHL SUP	UOD01	Expense
3	UOD01	140101	11/12/2004	I	E	(D)DO NOT USE, USE 140100	ATHL SUP	UOD01	Expense
4	UOD01	141001	01/01/1951	A	E	(D)DO NOT			Expense
5	UOD01	141001	11/12/2004	A	E	(D)DO NOT			Expense
6	UOD01	141001	11/19/2004	I	E	(D)DO NOT			Expense
7	UOD01	141201	11/12/2004	I	E	(D)DO NOT			Expense
8	UOD01	141201	01/01/1951	A	E	(D)DO NOT			Expense
9	UOD01	141401	11/12/2004	I	E	(D)DO NOT			Expense

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

- Click the **Criteria** tab
- Click the **Group Criteria** button

Query Name: EL_CLASS_JOINS2 Description: query class exercise

Group Criteria

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.EFFDT - Effective Date	Eff Date <=	Current Date	Edit	-
AND	A.EFF_STATUS - Status as of Effective Date	equal to	A	Edit	-
AND	A.ACCOUNT_TYPE - Account Type	equal to	E	Edit	-
OR	A.ACCOUNT - Account	like	14%	Edit	-
AND	A.SETID - SetID	equal to	B.SETID - SetID	Edit	-

- Add parenthesis as shown below to group the criteria for ACCOUNT_TYPE and ACCOUNT.
- Click **OK**

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.EFFDT - Effective Date	Eff Date <=	Current Date	
AND		A.EFF_STATUS - Status as of Effective Date	equal to	A	
AND	(A.ACCOUNT_TYPE - Account Type	equal to	E	
OR		A.ACCOUNT - Account	like	14%)
AND		A.SETID - SetID	equal to	B.SETID - SetID	

OK Cancel

- Click the **Run** tab
- Grouping the criteria has solved the problem. Note the number of rows returned is far less than on the bottom of page 41.

View All | Rerun Query | Download to Excel | Download to XML First 1-100 of 463 Last

	SetID	Account	Eff Date	Status	Type	Account Description	Short Desc	SetID	Account Type Descr
1	UOD01	150501	12/01/2004	A	E	(D)DO NOT USE, USE 150500	HAULING	UOD01	Expense
2	UOD01	152301	11/12/2004	A	E	(D)DO NOT USE, USE 152300	BUILDINGS-	UOD01	Expense
3	UOD01	199703	11/12/2004	A	E	(D)DO NOT USE, USE 199700	OP TRSFS	UOD01	Expense
4	UOD01	146900	06/21/2011	A	E	(D)PRT SPT-EMPLOYEE-FICA-NO1099	DONT USE	UOD01	Expense
5	UOD01	149814	01/01/1951	A	E	1743 FUNDING FOR UD (EXPENSE)	1743 FUND	UOD01	Expense
6	UOD01	121600	01/01/1951	A	E	ACADEMIC CENTER DIRECTORS	ACD CT DIR	UOD01	Expense
7	UOD01	142850	01/01/1951	A	E	ACADEMIC TECHNOLOGY SERVICES	ATS	UOD01	Expense
8	UOD01	158700	01/01/1951	A	E	ACCRETION EXP (G/A USE ONLY)	ACCRETION	UOD01	Expense
9	UOD01	164022	01/01/1951	A	E	ACOUSTICAL CEILINGS	ACOUS CEIL	UOD01	Expense

- 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.

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

Query Name: ELLELL_CLASS_CRITERIA Description: query class exercise Feed

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

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.SETID - SetID	Char5				SetID		Edit	-
2	A.ACCOUNT - Account	Char10	1			Account		Edit	-
3	A.EFFDT - Effective Date	Date				Eff Date		Edit	-
4	A.EFF_STATUS - Status as of Effective Date	Char1		N		Status		Edit	-
5	A.ACCOUNT_TYPE - Account Type	Char1				Type		Edit	-
6	A.DESCR - Description	Char30				Descr		Edit	-
7	A.DESCRSHORT - Short Description	Char10				Short Desc		Edit	-
8	B.SETID - SetID	Char5				SetID		Edit	-
9	B.DESCR - Description	Char30				Descr		Edit	-

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**

Edit Field Properties

Field Name: A.DESCR - Description

Heading

No Heading RFT Short

Text RFT Long

Heading Text:

*Unique Field Name:

Aggregate

None

Sum

Count

Min

Max

Average

OK Cancel

25. Click the **Run** tab.

Note how long it takes the query to run.

You should see a page similar to the following:

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

[View All](#) | [Rerun Query](#) | [Download to Excel](#) | [Download to XML](#) First 1-100 of 579 Last

	SetID	Account	Eff Date	Status	Type	Account Description	Short Desc	SetID	Descr
1	UOD01	120200	01/01/1951	A	E	PROFESSIONAL STAFF FULL-TIME	PROF FT	UOD01	Expense
2	UOD01	120299	01/01/1951	A	E	COMPENSATED ABSENCES	COMP ABSEN	UOD01	Expense
3	UOD01	120300	01/01/1951	A	E	PROFESSIONAL STAFF PART-TIME	PROF PT	UOD01	Expense
4	UOD01	120400	01/01/1951	A	E	SUPPLEMENTAL PAY - PROFESSIONA	SUPPL PR	UOD01	Expense
5	UOD01	120500	01/01/1951	A	E	OFF-CAMPUS - PROFESSIONAL	OFF-CMP PR	UOD01	Expense
6	UOD01	120700	01/01/1951	A	E	DISABILITY PAY PROFESSIONALS	DISABILITY	UOD01	Expense
7	UOD01	120800	05/04/2010	A	E	POST DOC/FACULTY FELLOW	POSTDOC	UOD01	Expense
8	UOD01	121000	01/01/1951	A	E	CHAIRPERSONS	CHAIRPERSO	UOD01	Expense
9	UOD01	121100	01/01/1951	A	E	FACULTY FULL-TIME (BARGAINING	FACULTY FT	UOD01	Expense

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

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

Query Name: ELLELL_CLASS_CRITERIA Description: query class exercise Feed

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

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.SETID - SetID	Char5				SetID		Edit	
2	A.ACCOUNT - Account	Char10	1			Account		Edit	
3	A.EFFDT - Effective Date	Date				Eff Date		Edit	
4	A.EFF_STATUS - Status as of Effective Date	Char1		N		Status		Edit	
5	A.ACCOUNT_TYPE - Account Type	Char1				Type		Edit	
6	A.DESCR - Description	Char30				Account Description		Edit	
7	A.DESCRSHORT - Short Description	Char10				Short Desc		Edit	
8	B.SETID - SetID	Char5				SetID		Edit	
9	B.DESCR - Description	Char30				Descr		Edit	

Save As [New Query](#) [Preferences](#) [Properties](#) [Publish as Feed](#) [New Union](#) Return To Search

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:

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

Query Name: ELLELL_CLASS_JOINS Description: query class exercise Feed

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

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.SETID - SetID	Char5				SetID	+	Edit	-
2	A.ACCOUNT - Account	Char10	1			Account	+	Edit	-
3	A.EFFDT - Effective Date	Date				Eff Date	+	Edit	-
4	A.EFF_STATUS - Status as of Effective Date	Char1		N		Status	+	Edit	-
5	A.ACCOUNT_TYPE - Account Type	Char1				Type	+	Edit	-
6	A.DESCR - Description	Char30				Account Description	+	Edit	-
7	A.DESCRSHORT - Short Description	Char10				Short Desc	+	Edit	-
8	B.SETID - SetID	Char5				SetID	+	Edit	-
9	B.DESCR - Description	Char30				Descr	+	Edit	-

Save Save As New Query Preferences Properties Publish as Feed New Union Return To Set

2. Click the **Reorder/Sort** **Reorder / Sort** button.

You should see the **Edit Field Ordering** page similar to the following:

Edit Field Ordering

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

New Column	Column	Record.FieldName	Order By	Descending	New Order By
	1	A.SETID - SetID		<input type="checkbox"/>	
	2	A.ACCOUNT - Account	1	<input type="checkbox"/>	1
	3	A.EFFDT - Effective Date		<input type="checkbox"/>	
	4	A.EFF_STATUS - Status as of Effective Date		<input type="checkbox"/>	
	5	A.ACCOUNT_TYPE - Account Type		<input type="checkbox"/>	
	6	A.DESCR - Description		<input type="checkbox"/>	
	7	A.DESCRSHORT - Short Description		<input type="checkbox"/>	
	8	B.SETID - SetID		<input type="checkbox"/>	
	9	B.DESCR - Description		<input type="checkbox"/>	

OK Cancel

The first column labeled **New Column** determines the left to right order of the columns.

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

Edit Field Ordering

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

Edit Field Ordering					
Customize Find View All First 1-9 of 9 Last					
New Column	Column	Record.Fieldname	Order By	Descending	New Order By
		1 A.SETID - SetID		<input type="checkbox"/>	
1	2	A.ACCOUNT - Account	1	<input type="checkbox"/>	1
	3	A.EFFDT - Effective Date		<input type="checkbox"/>	
	4	A.EFF_STATUS - Status as of Effective Date		<input type="checkbox"/>	
	5	A.ACCOUNT_TYPE - Account Type		<input type="checkbox"/>	
	2	A.DESCR - Description		<input type="checkbox"/>	
	3	A.DESCRSHORT - Short Description		<input type="checkbox"/>	
	8	B.SETID - SetID		<input type="checkbox"/>	
	9	B.DESCR - Description		<input type="checkbox"/>	

OK Cancel

The right column labeled **New Order By** determines how to sort *rows of data*.

(Note: PS sorts numbers before alpha characters.)

- 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:

Edit Field Ordering

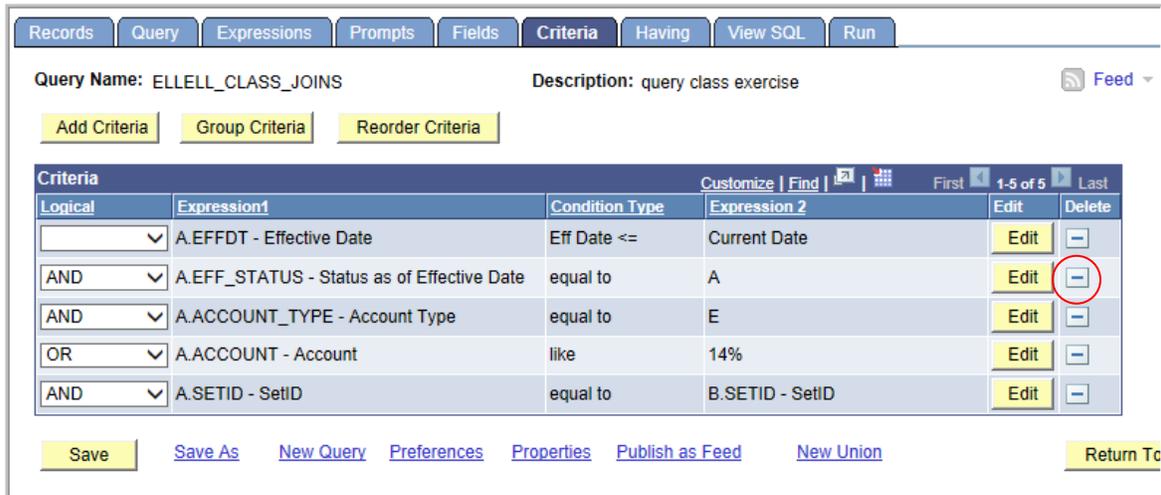
Reorder columns by entering column numbers on the left. Columns left blank or assigned a 0 will be automatically assigned a number. Change the order by number by entering numbers on the right. To remove an order by number, leave the field blank or enter a 0.

Edit Field Ordering					
Customize Find View All First 1-9 of 9 Last					
New Column	Column	Record.Fieldname	Order By	Descending	New Order By
		1 A.SETID - SetID		<input type="checkbox"/>	
1	2	A.ACCOUNT - Account	1	<input type="checkbox"/>	2
	3	A.EFFDT - Effective Date		<input type="checkbox"/>	
	4	A.EFF_STATUS - Status as of Effective Date		<input type="checkbox"/>	1
	5	A.ACCOUNT_TYPE - Account Type		<input type="checkbox"/>	
	2	A.DESCR - Description		<input type="checkbox"/>	
	3	A.DESCRSHORT - Short Description		<input type="checkbox"/>	
	8	B.SETID - SetID		<input type="checkbox"/>	
	9	B.DESCR - Description		<input type="checkbox"/>	

OK Cancel

- Click **OK**.

6. Click on **Criteria** tab
7. Remove the criterion for **A. EFF_STATUS equal to A** using the delete button 



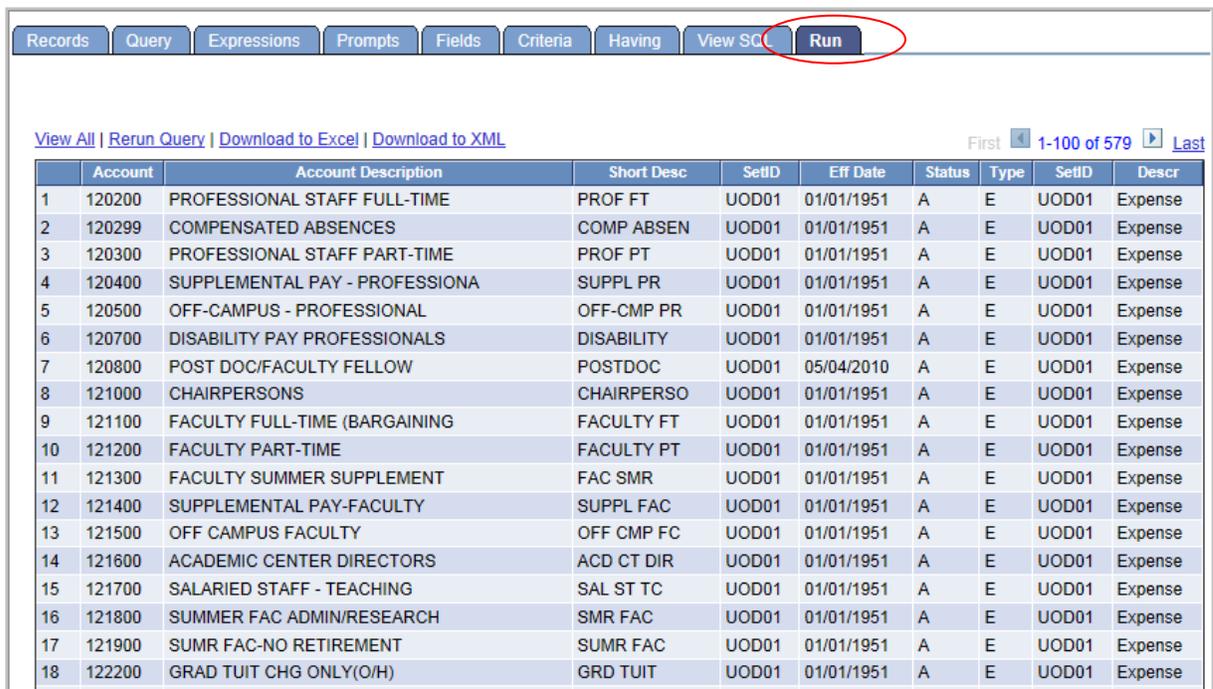
Query Name: ELLELL_CLASS_JOINS Description: query class exercise

[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.EFF_STATUS - Status as of Effective Date	equal to	A	Edit	-
AND	A.ACCOUNT_TYPE - Account Type	equal to	E	Edit	-
OR	A.ACCOUNT - Account	like	14%	Edit	-
AND	A.SETID - SetID	equal to	B.SETID - SetID	Edit	-

[Save](#) [Save As](#) [New Query](#) [Preferences](#) [Properties](#) [Publish as Feed](#) [New Union](#) [Return To](#)

8. Click the **Run** tab.
9. You should see a page similar to the following results.



[View All](#) | [Rerun Query](#) | [Download to Excel](#) | [Download to XML](#) First 1-100 of 579 Last

	Account	Account Description	Short Desc	SetID	Eff Date	Status	Type	SetID	Descr
1	120200	PROFESSIONAL STAFF FULL-TIME	PROF FT	UOD01	01/01/1951	A	E	UOD01	Expense
2	120299	COMPENSATED ABSENCES	COMP ABSEN	UOD01	01/01/1951	A	E	UOD01	Expense
3	120300	PROFESSIONAL STAFF PART-TIME	PROF PT	UOD01	01/01/1951	A	E	UOD01	Expense
4	120400	SUPPLEMENTAL PAY - PROFESSIONA	SUPPL PR	UOD01	01/01/1951	A	E	UOD01	Expense
5	120500	OFF-CAMPUS - PROFESSIONAL	OFF-CMP PR	UOD01	01/01/1951	A	E	UOD01	Expense
6	120700	DISABILITY PAY PROFESSIONALS	DISABILITY	UOD01	01/01/1951	A	E	UOD01	Expense
7	120800	POST DOC/FACULTY FELLOW	POSTDOC	UOD01	05/04/2010	A	E	UOD01	Expense
8	121000	CHAIRPERSONS	CHAIRPERSO	UOD01	01/01/1951	A	E	UOD01	Expense
9	121100	FACULTY FULL-TIME (BARGAINING	FACULTY FT	UOD01	01/01/1951	A	E	UOD01	Expense
10	121200	FACULTY PART-TIME	FACULTY PT	UOD01	01/01/1951	A	E	UOD01	Expense
11	121300	FACULTY SUMMER SUPPLEMENT	FAC SMR	UOD01	01/01/1951	A	E	UOD01	Expense
12	121400	SUPPLEMENTAL PAY-FACULTY	SUPPL FAC	UOD01	01/01/1951	A	E	UOD01	Expense
13	121500	OFF CAMPUS FACULTY	OFF CMP FC	UOD01	01/01/1951	A	E	UOD01	Expense
14	121600	ACADEMIC CENTER DIRECTORS	ACD CT DIR	UOD01	01/01/1951	A	E	UOD01	Expense
15	121700	SALARIED STAFF - TEACHING	SAL ST TC	UOD01	01/01/1951	A	E	UOD01	Expense
16	121800	SUMMER FAC ADMIN/RESEARCH	SMR FAC	UOD01	01/01/1951	A	E	UOD01	Expense
17	121900	SUMR FAC-NO RETIREMENT	SUMR FAC	UOD01	01/01/1951	A	E	UOD01	Expense
18	122200	GRAD TUIT CHG ONLY(O/H)	GRD TUIT	UOD01	01/01/1951	A	E	UOD01	Expense

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

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](#)

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

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**

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

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

Find an Existing Record

*Search By: begins with

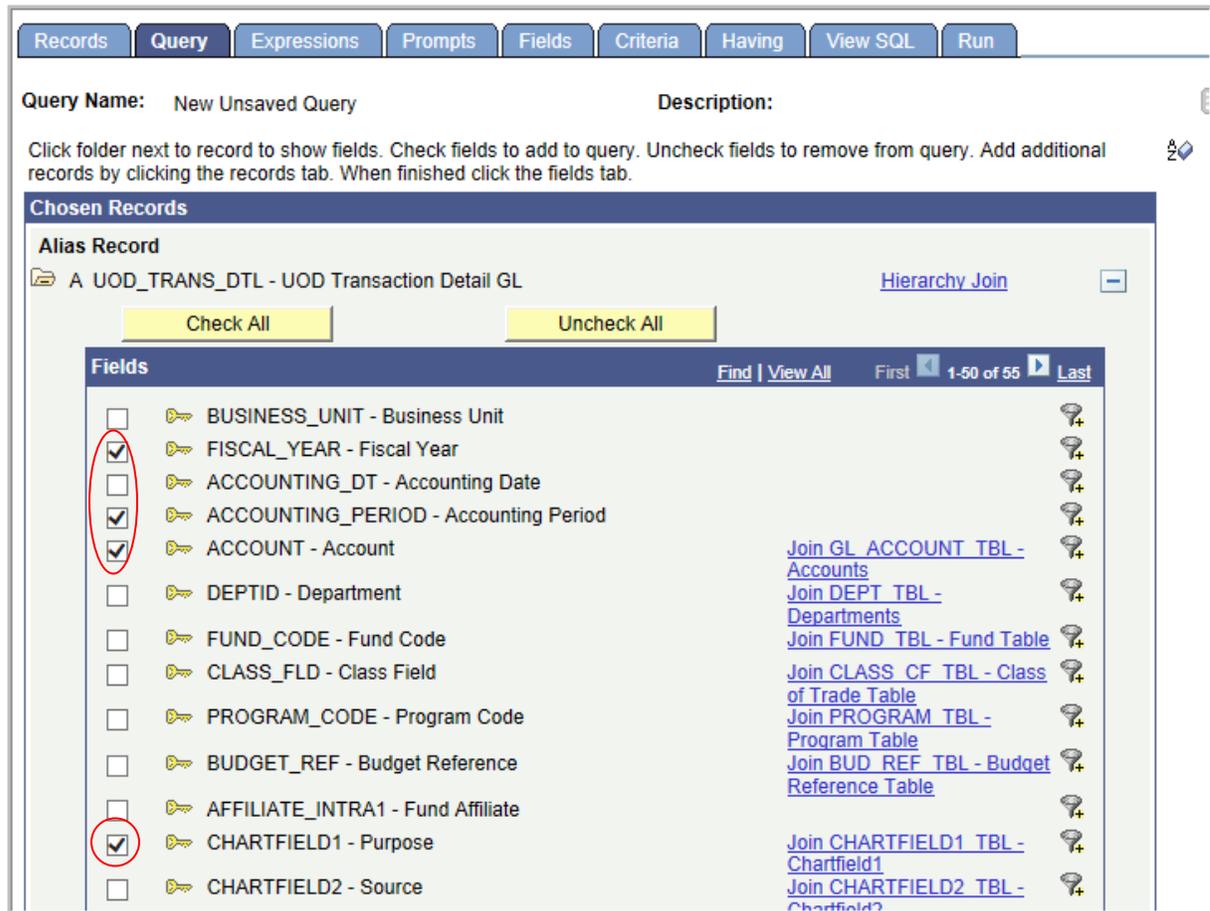
[Advanced Search](#)

Search Results

Record	Customize	Find	View All	First	1-2 of 2	Last
Recname	Add Record	Show Fields				
UOD_TRANS_DTL - UOD Transaction Detail GL	Add Record	Show Fields				
UOD_TRANS_NOTEB - UOD Trans Detail Notes BackUp	Add Record	Show Fields				

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.)

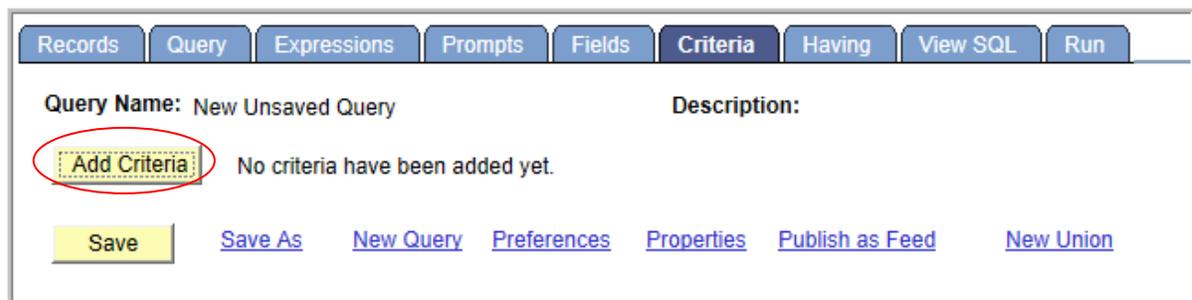


7. Click the **Fields** tab to confirm that the seven fields have been added.

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:

Alias	Record	Record Description	Show Fields
A	UOD_TRANS_DTL	UOD Transaction Detail GL	Show Fields

- A.BUSINESS_UNIT - Business Unit
- A.FISCAL_YEAR - Fiscal Year
- A.ACCOUNTING_DT - Accounting Date
- A.ACCOUNTING_PERIOD - Accounting Period
- A.ACCOUNT - Account

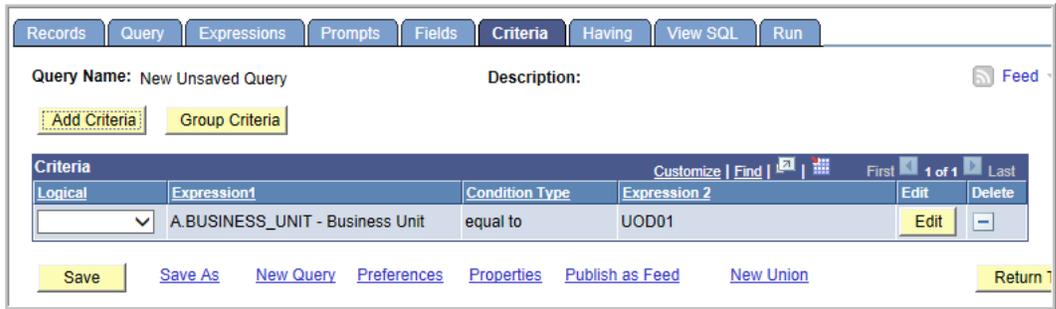
12. Click the **A.BUSINESS_UNIT - Business Unit**.

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

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

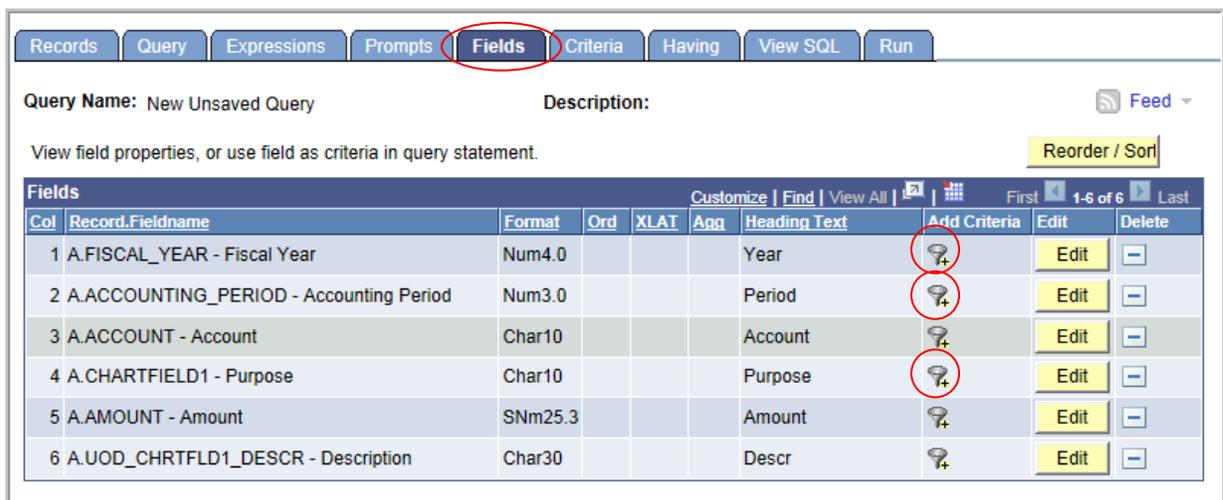
15. Click **OK**

Your **Criteria** page will look like this:

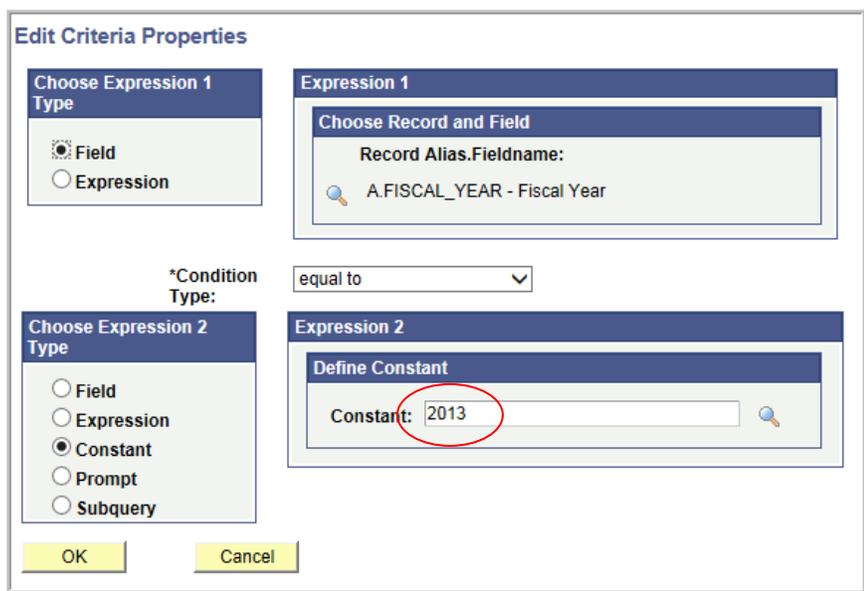


16. Click on the **Fields** tab, you will be adding criteria for these three fields:

- **Fiscal Year**
- **Accounting Period**
- **Chartfield1 – Purpose**



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



Edit Criteria Properties

Choose Expression 1 Type

Field
 Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:
A.ACCOUNTING_PERIOD - Accounti

*Condition Type: equal to

Choose Expression 2 Type

Field
 Expression
 Constant
 Prompt
 Subquery

Expression 2

Define Constant

Constant: 1

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!)

Edit Criteria Properties

Choose Expression 1 Type

Field
 Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:
A.CHARTFIELD1 - Purpose

*Condition Type: like

Choose Expression 2 Type

Constant
 Prompt

Expression 2

Define Constant

Constant: MAST112%

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

OK Cancel

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

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

[View All](#) | [Rerun Query](#) | [Download to Excel](#) | [Download to XML](#) First 1-100 of 698 Last

	Year	Period	Account	Purpose	Ledger	Amount	Descr
1	2013	1	140000	MAST112111	BEBUD	5000.000	CEOE-LEWES HONORS DAY
2	2013	1	122600	MAST112112	ACTUALS	931.250	CEOE GRADUATE SUPPORT
3	2013	1	122600	MAST112112	ACTUALS	1004.170	CEOE GRADUATE SUPPORT
4	2013	1	122600	MAST112112	ACTUALS	1004.170	CEOE GRADUATE SUPPORT
5	2013	1	122600	MAST112112	ACTUALS	931.250	CEOE GRADUATE SUPPORT
6	2013	1	122600	MAST112112	ACTUALS	1004.170	CEOE GRADUATE SUPPORT
7	2013	1	122600	MAST112112	ACTUALS	1004.170	CEOE GRADUATE SUPPORT

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**.

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

Query Name: EL_CLASS_AGGR_SUM Description: Feed

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

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.FISCAL_YEAR - Fiscal Year	Num4.0				Year		Edit	
2	A.ACCOUNTING_PERIOD - Accounting Period	Num3.0				Period		Edit	
3	A.ACCOUNT - Account	Char10				Account		Edit	
4	A.CHARTFIELD1 - Purpose	Char10				Purpose		Edit	
5	A.LEDGER - Ledger	Char10				Ledger		Edit	
6	A.AMOUNT - Amount	SNm25.3				Amount		Edit	
7	A.UOD_CHRTFLD1_DESCR - Description	Char30				Descr		Edit	

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

21. Click **OK**

Edit Field Properties

Field Name: A.AMOUNT - Amount

Heading

No Heading RFT Short

Text RFT Long

Heading Text:
Amount

*Unique Field Name:
A.AMOUNT

Aggregate

None

Sum

Count

Min

Max

Average

OK Cancel

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

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

[View All](#) | [Rerun Query](#) | [Download to Excel](#) | [Download to XML](#) First 1-100 of 114 Last

	Year	Period	Account	Purpose	Ledger	Sum Amount	Descr
1	2013	1	120200	MAST112115	BEBUD	313749.000	SMSP SUPPORT
2	2013	1	120200	MAST112115	ACTUALS	6837.380	SMSP SUPPORT
3	2013	1	120200	MAST112124	ACTUALS	17218.040	CEOE-UNIV SPON RESEARCH
4	2013	1	120200	MAST112125	ACTUALS	719.400	CEOE-OTHER RSRCH MATCHING
5	2013	1	120200	MAST112126	ACTUALS	4907.240	CEOE-SEA GRANT RSRCH MATCHING
6	2013	1	120200	MAST112129	ACTUALS	824.060	CEOE - FACULTY SERVICE

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:

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.BUSINESS_UNIT - Business Unit	equal to	UOD01	Edit	-
AND	A.FISCAL_YEAR - Fiscal Year	equal to	2013	Edit	-
AND	A.ACCOUNTING_PERIOD - Accounting Period	equal to	1	Edit	-
AND	A.CHARTFIELD1 - Purpose	like	MAST112%	Edit	-

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).

Edit Criteria Properties

Choose Expression 1 Type
 Field
 Expression

Expression 1
 Choose Record and Field
 Record Alias.Fieldname:
 A.ACCOUNTING_PERIOD - Accounti

*Condition Type: **not equal to**

Choose Expression 2 Type
 Field
 Expression
 Constant
 Prompt
 Subquery

Expression 2
 Define Constant
 Constant: **999**

OK Cancel

Accounting Period 999 contains the system-generated entries to close the fiscal year and should not be included.

5. Click the **Run** tab

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

	Year	Period	Account	Purpose	Ledger	Sum Amount	Descr
101	2013	1	154800	MAST112115	ACTUALS	5123.450	SMSP SUPPORT
102	2013	1	154800	MAST112118	ACTUALS	15.000	PHYSICAL OCEAN INSTRUCTION
103	2013	1	190000	MAST112115	BEGBUD	-546705.000	SMSP SUPPORT
104	2013	1	190000	MAST112128	BEGBUD	-7000.000	CEOE-LEWES COAST DAY
105	2013	1	190000	MAST112167	BEGBUD	836504.000	RTRMNTS-SGBNF-HULL INS ALLO
106	2013	1	R00100	MAST112139	ACTUALS	-122580.000	REV GRAD TUIT CEOE FT RES FLL
107	2013	1	R00100	MAST112142	ACTUALS	-18156.000	REV GRAD TUIT CEOE PT RES FLL
108	2013	1	R00100	MAST112153	ACTUALS	-8614.000	REV MASTER SUSTAIN CEOE
109	2013	1	R00200	MAST112141	ACTUALS	-967020.000	REV GRAD TUIT CEOE FT NRES FLL

6. Click the **Fields** tab.

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

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.FISCAL_YEAR - Fiscal Year	Num4.0				Year			
2	A.ACCOUNTING_PERIOD - Accounting Period	Num3.0				Period			
3	A.ACCOUNT - Account	Char10				Account			
4	A.CHARTFIELD1 - Purpose	Char10				Purpose			
5	A.AMOUNT - Amount	SNm25.3			Sum	Sum Amount			
6	A.UOD_CHRTFLD1_DESCR - Description	Char30				Descr			

8. You should see the **Edit Fields Properties** page.

9. In the **Aggregate** box, click **Count**.

10. Click **OK**

Edit Field Properties

Field Name: A.ACCOUNT - Account

Heading

No Heading RFT Short

Text RFT Long

Heading Text: Account

*Unique Field Name: A.ACCOUNT

Aggregate

None

Sum

Count

Min

Max

Average

OK Cancel

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.

	Year	Period	Count Account	Purpose	Ledger	Sum Amount	Descr
1	2013	1	1	MAST112111	BEGBUD	5000.000	CEOE-LEWES HONORS DAY
2	2013	9	2	MAST112111	ACTUALS	388.800	CEOE-LEWES HONORS DAY
3	2013	11	4	MAST112111	ACTUALS	4608.640	CEOE-LEWES HONORS DAY
4	2013	1	24	MAST112112	ACTUALS	20742.680	CEOE GRADUATE SUPPORT
5	2013	1	2	MAST112112	BEGBUD	335277.000	CEOE GRADUATE SUPPORT
6	2013	2	62	MAST112112	ACTUALS	43767.270	CEOE GRADUATE SUPPORT
7	2013	3	47	MAST112112	ACTUALS	20367.990	CEOE GRADUATE SUPPORT
8	2013	4	59	MAST112112	ACTUALS	25257.940	CEOE GRADUATE SUPPORT

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

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.FISCAL_YEAR - Fiscal Year	Num4.0				Year	+	Edit	-
2	A.ACCOUNTING_PERIOD - Accounting Period	Num3.0				Period	+	Edit	-
3	A.ACCOUNT - Account	Char10				Count Count Account	+	Edit	-
4	A.CHARTFIELD1 - Purpose	Char10	1			Purpose	+	Edit	-
5	A.LEDGER - Ledger	Char10				Ledger	+	Edit	-
6	A.AMOUNT - Amount	SNm25.3			Sum	Sum Amount	+	Edit	-
7	A.UOD_CHRTFLD1_DESCR - Description	Char30				Descr	+	Edit	-

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.

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

Query Name: EL_CLASS_AGGR_COUNT_X Description: class template Exercise 15 Feed

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

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.FISCAL_YEAR - Fiscal Year	Num4.0				Year		Edit	-
2	A.ACCOUNTING_PERIOD - Accounting Period	Num3.0				Period		Edit	-
3	A.ACCOUNT - Account	Char10			Count	Count Account		Edit	-
4	A.CHARTFIELD1 - Purpose	Char10	1			Purpose		Edit	-
5	A.LEDGER - Ledger	Char10				Ledger		Edit	-
6	A.AMOUNT - Amount	SNm25.3			Sum	Sum Amount		Edit	-
7	A.UOD_CHRTFLD1_DESCR - Description	Char30				Descr		Edit	-

3. Click the drop-down arrow next to **Condition Type** and click **greater than**.
4. In the **Define Constant** box, type: **0**.

Edit Having Criteria Properties

Choose Expression 1 Type

Field
 Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:

A.AMOUNT - Amount

*Condition Type: **greater than**

Choose Expression 2 Type

Field
 Expression
 Constant
 Prompt
 Subquery

Expression 2

Define Constant

Constant: **0**

OK Cancel

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

Note: This criterion does NOT appear on the **Criteria** page.

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.BUSINESS_UNIT - Business Unit	equal to	UOD01	Edit	-
AND	A.FISCAL_YEAR - Fiscal Year	equal to	2013	Edit	-
AND	A.ACCOUNTING_PERIOD - Accounting Period	not equal to	999	Edit	-
AND	A.CHARTFIELD1 - Purpose	like	MAST112%	Edit	-

7. Click the **Having** tab.

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

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.AMOUNT - Amount	greater than	0	Edit	-

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.

	Year	Period	Count Account	Purpose	Ledger	Sum Amount	Descr
1	2013	1	1	MAST112111	BEBUD	5000.000	CEOE-LEWES HONORS DAY
2	2013	9	2	MAST112111	ACTUALS	388.800	CEOE-LEWES HONORS DAY
3	2013	11	4	MAST112111	ACTUALS	4608.640	CEOE-LEWES HONORS DAY
4	2013	1	24	MAST112112	ACTUALS	20742.680	CEOE GRADUATE SUPPORT
5	2013	1	2	MAST112112	BEBUD	335277.000	CEOE GRADUATE SUPPORT
6	2013	2	62	MAST112112	ACTUALS	43767.270	CEOE GRADUATE SUPPORT
7	2013	3	47	MAST112112	ACTUALS	20367.990	CEOE GRADUATE SUPPORT
8	2013	4	59	MAST112112	ACTUALS	25257.940	CEOE GRADUATE SUPPORT
9	2013	5	53	MAST112112	ACTUALS	24514.270	CEOE GRADUATE SUPPORT

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

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](#)

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

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

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

Query Name: New Unsaved Query Description:

Find an Existing Record

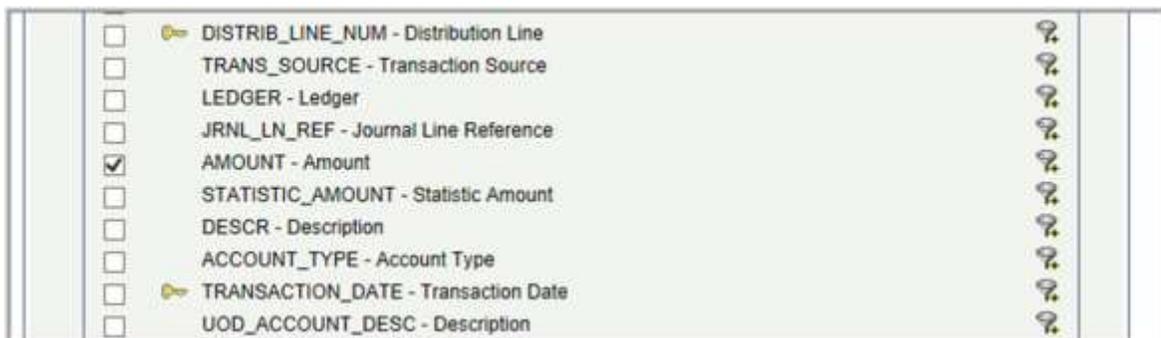
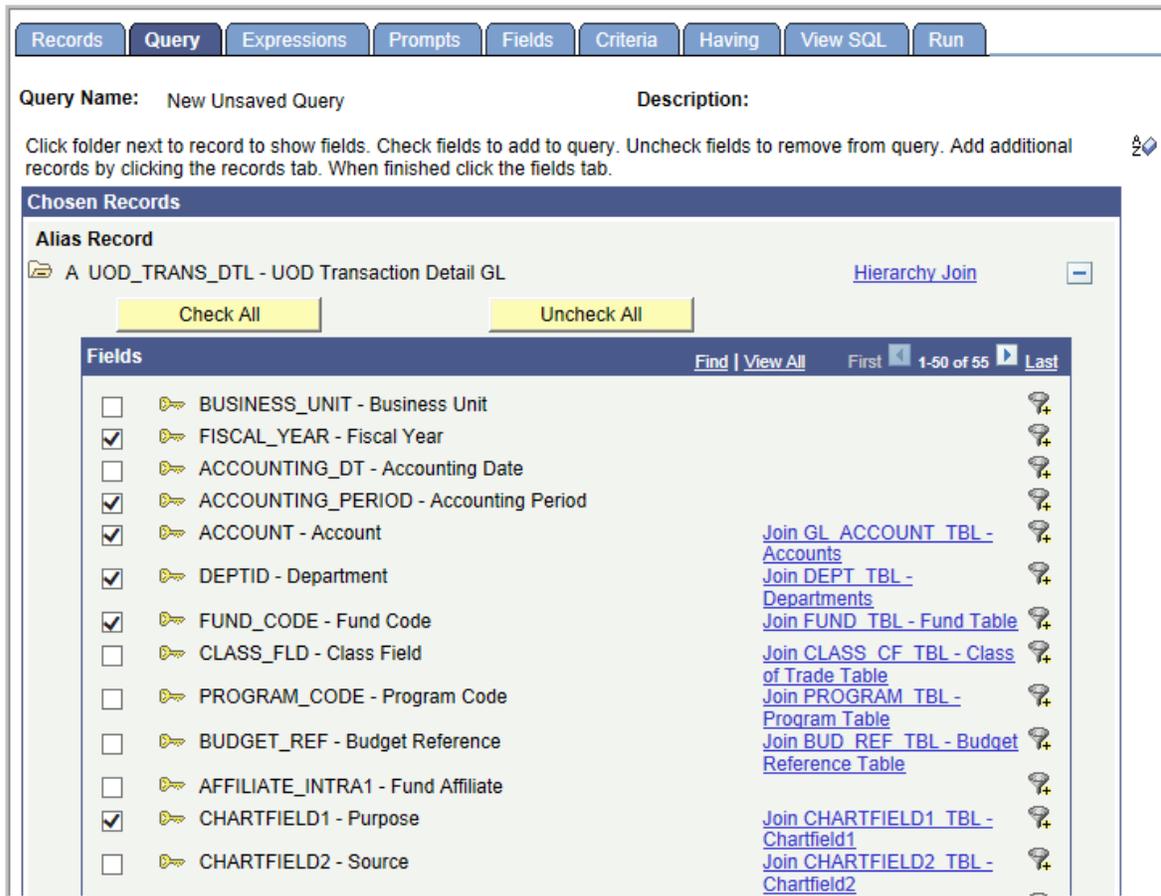
*Search By: begins with

[Advanced Search](#)

Search Results

Record	Customize	Find	View All	First	1-3 of 3	Last
UOD_TRANS_DTL - UOD Transaction Detail GL	Add Record	Show Fields				
UOD_TRANS_NOTE_B - UOD Trans Detail Notes BackUp	Add Record	Show Fields				
UOD_TRN_NOTE_VW - UOD Transaction Detail GL	Add Record	Show Fields				

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).

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

Query Name: ELLEN_CLASS_EXPRESSIONS Description: Feed

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

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.FISCAL_YEAR - Fiscal Year	Num4.0				Year		Edit	-
2	A.ACCOUNTING_PERIOD - Accounting Period	Num3.0				Period		Edit	-
3	A.ACCOUNT - Account	Char10				Account		Edit	-
4	A.DEPTID - Department	Char10				Dept		Edit	-
5	A.FUND_CODE - Fund Code	Char5				Fund		Edit	-
6	A.CHARTFIELD1 - Purpose	Char10				Purpose		Edit	-
7	A.AMOUNT - Amount	SNm25.3				Amount		Edit	-

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

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

Query Name: ELLEN_CLASS_EXPRESSIONS Description:

Add Expression No expressions have been defined yet.

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

10. You will see a page like this:

Edit Expression Properties

*Expression Type: Character Length: 1

Aggregate Function Decimals:

Expression Text:

[Add Prompt](#) [Add Field](#)

OK Cancel

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

Edit Expression Properties

*Expression Type: Signed Number ▼ Length: 15

Aggregate Function Decimals: 2

Expression Text:

[Add Prompt](#) Add Field

OK Cancel

15. Scroll down to find the **A.AMOUNT - Amount** link and then click on it.

Select a field

Select a record to show fields for			
Alias	Record	Record Description	Show Fields
A	UOD_TRANS_DTL	UOD Transaction Detail GL	Show Fields

Select a field			
Alias	Record	Record Description	Show Fields
A.BUSINESS_UNIT - Business Unit			
A.FISCAL_YEAR - Fiscal Year			
A.ACCOUNTING_DT - Accounting Date			
A.ACCOUNTING_PERIOD - Accounting Period			
A.ACCOUNT - Account			
A.DEPTID - Department			

A.TRANS_SOURCE - Transaction Source	
A.LEDGER - Ledger	
A.JRNL_LN_REF - Journal Line Reference	
A.AMOUNT - Amount	
A.STATISTIC_AMOUNT - Statistic Amount	
A.DESCR - Description	
A.ACCOUNT_TYPE - Account Type	
A.TRANSACTION_DATE - Transaction Date	
A.UOD_ACCOUNT_DESCR - Description	
A.UOD_DEPTID_DESCR - Description	
A.UOD_FUNDCODE_DESCR - Description	

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

*Expression Type: Signed Number Length: 15

Aggregate Function Decimals: 2

Expression Text: A.AMOUNT

[Add Prompt](#) [Add Field](#)

OK Cancel

17. At the end of the existing text in the **Expression Text** box, type: ***1.05**
This will add 5% to the amount.

Edit Expression Properties

*Expression Type: Signed Number Length: 15

Aggregate Function Decimals: 2

Expression Text: A.AMOUNT*1.05

[Add Prompt](#) [Add Field](#)

OK Cancel

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.

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Query Name: ELLEN_CLASS_EXPRESSIONS Description: Feed

Add Expression

Expression Text	Use as Field	Add Criteria	Edit	Delete
A.AMOUNT*1.05	Use as Field		Edit	

Save Save As New Query Preferences Properties Publish as Feed New Union Return T

20. Note that you have a new field called **A.AMOUNT*1.05**.

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

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.FISCAL_YEAR - Fiscal Year	Num4.0				Year		Edit	-
2	A.ACCOUNTING_PERIOD - Accounting Period	Num3.0				Period		Edit	-
3	A.ACCOUNT - Account	Char10				Account		Edit	-
4	A.DEPTID - Department	Char10				Dept		Edit	-
5	A.FUND_CODE - Fund Code	Char5				Fund		Edit	-
6	A.CHARTFIELD1 - Purpose	Char10				Purpose		Edit	-
7	A.AMOUNT - Amount	SNm25.3				Amount		Edit	-
8	A.AMOUNT*1.05	SNm13.2				A.AMOUNT*1.05		Edit	-

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**

Edit Field Properties

Field Name: A.AMOUNT*1.05

Heading

No Heading RFT Short
 Text RFT Long

Heading Text:

*Unique Field Name:

Aggregate

None
 Sum
 Count
 Min
 Max
 Average

OK Cancel

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

Year	Period	Account	Dept	Fund	Purpose	Amount	5% Projected Increase
1	2014	4 145600	01520	OPBAS	ADMN112114	261,710	274.79

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.

Query Name: ELLEN_CLASS_AGGR_SUM Description: class template Exercise 15

Buttons: Add Criteria, Group Criteria, Reorder Criteria

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.BUSINESS_UNIT - Business Unit	equal to	UOD01	Edit	-
AND	A.FISCAL_YEAR - Fiscal Year	equal to	2013	Edit	-
AND	A.ACCOUNTING_PERIOD - Accounting Period	equal to	1	Edit	-
AND	A.CHARTFIELD1 - Purpose	like	MAST112%	Edit	-

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**.

Edit Criteria Properties

Choose Expression 1 Type: Field Expression

Expression 1: Choose Record and Field: Record Alias.Fieldname: A.CHARTFIELD1 - Purpose

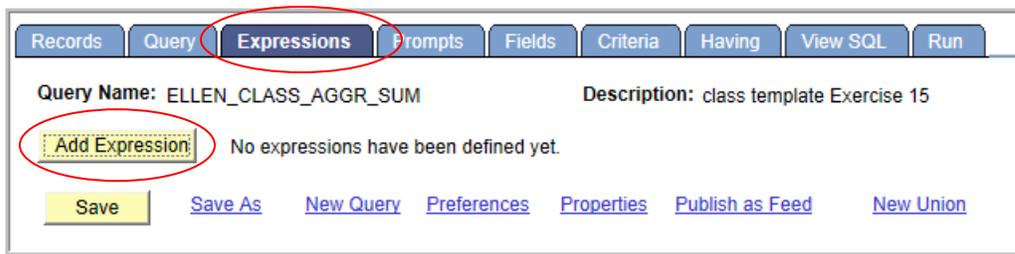
*Condition Type:

Choose Expression 2 Type: Constant Prompt

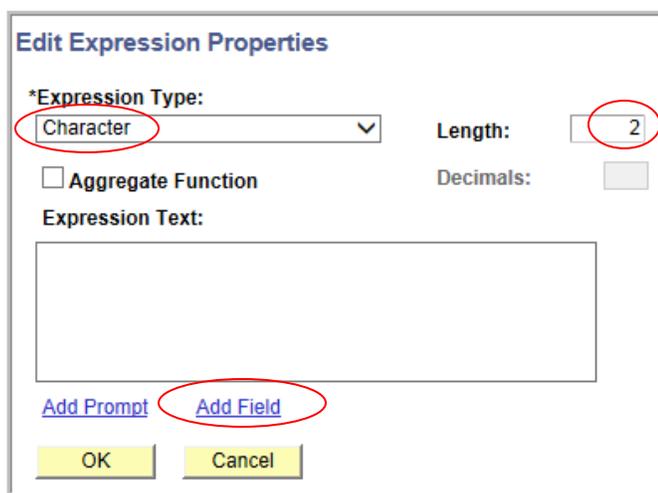
Expression 2: Define Constant: Constant:

Buttons: OK, Cancel

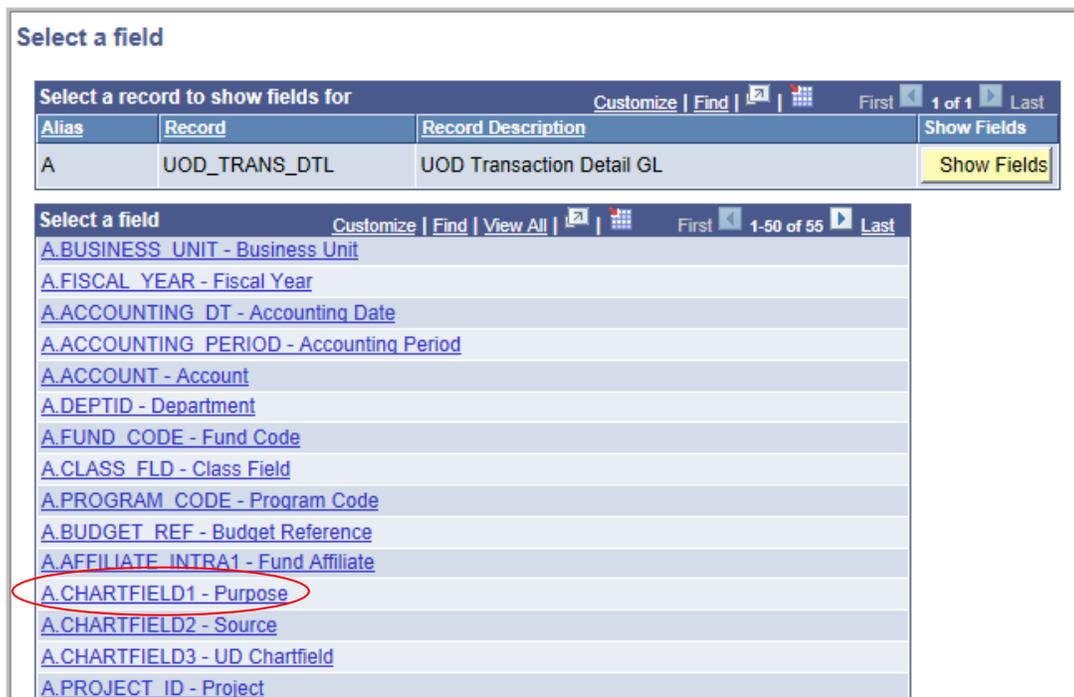
5. Click the **Expressions** tab
6. Click the **Add Expression** button



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



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

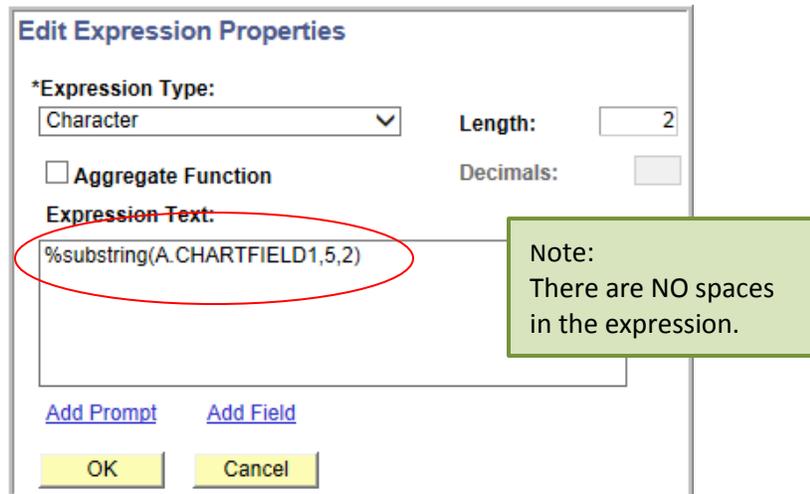


You will create an expression to extract the 5th and 6th characters from the Purpose codes.

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

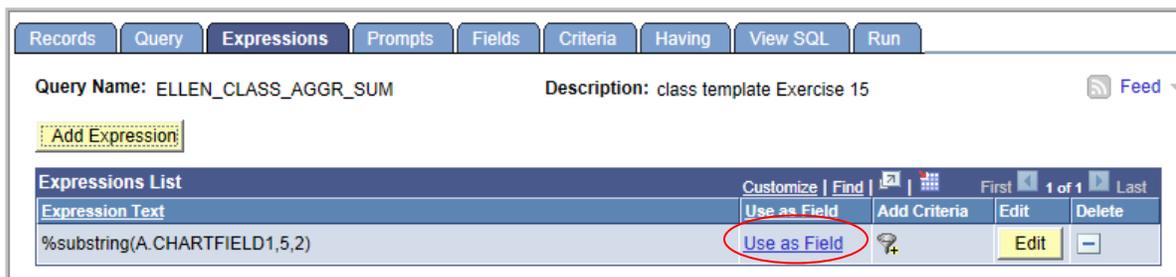
12. Type this *after* A.CHARTFIELD1: **, 5, 2)**

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

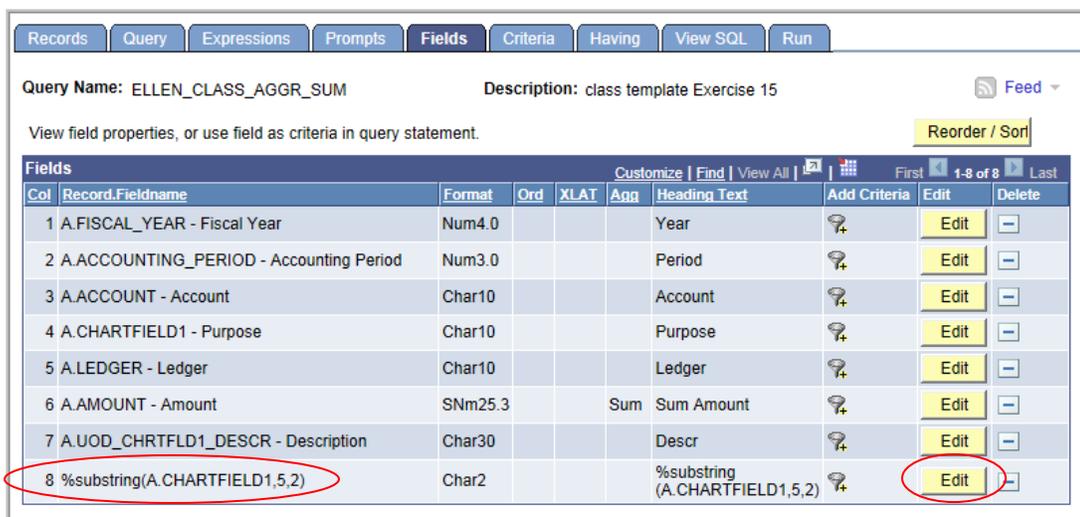


13. Click **OK**.

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

Field Name: %substring(A.CHARTFIELD1,5,2)

Heading

No Heading RFT Short

Text RFT Long

Heading Text: Purpose 5, 6

*Unique Field Name: EXPR8_8

OK Cancel

Aggregate

None

Sum

Count

Min

Max

Average

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.

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

View All | [Rerun Query](#) | [Download to Excel](#) | [Download to XML](#) First 1-94 of 94 Last

	Year	Period	Account	Purpose	Ledger	Sum Amount	Descr	Purpose 5, 6
1	2013	1	125200	STGP912416	ACTUALS	1600.000	ICE HOCKEY CLUB	91
2	2013	1	126000	STGP912115	ACTUALS	374.000	THE REVIEW	91
3	2013	1	129500	STGP912416	ACTUALS	126.400	ICE HOCKEY CLUB	91
4	2013	1	130100	STGP912439	ACTUALS	-393.800	CATHOLIC CAMPUS MINISTRY	91
5	2013	1	140140	STGP912115	ACTUALS	75.000	THE REVIEW	91
6	2013	1	140140	STGP912352	ACTUALS	1254.930	GREEK AFFAIRS	91
7	2013	1	140140	STGP912375	ACTUALS	800.000	ALPHA KAPPA ALPHA	91
8	2013	1	140140	STGP912439	ACTUALS	2855.110	CATHOLIC CAMPUS MINISTRY	91
9	2013	1	141900	STGP912338	ACTUALS	2.490	RSA	91

--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

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

Query Name: ELLELL_CLASS_AGGR_SUM_X Description:

Add Expression No expressions have been defined yet.

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

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.

Edit Expression Properties

*Expression Type: **Character** Length: **15**

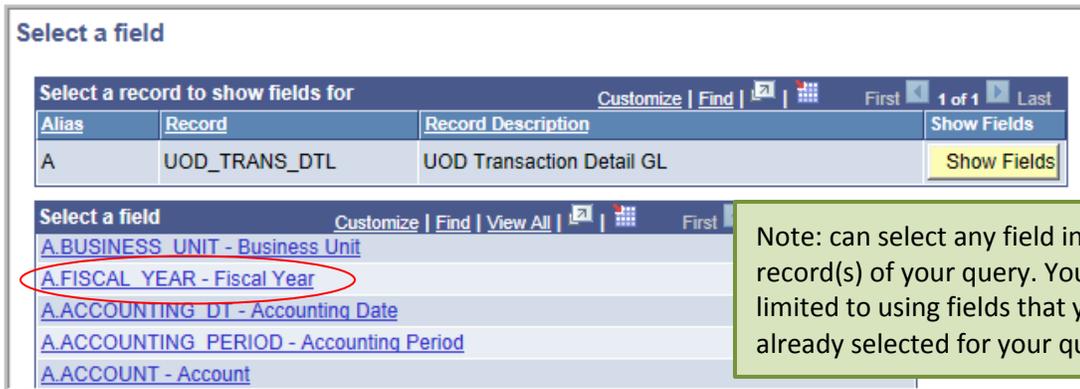
Aggregate Function Decimals:

Expression Text:

[Add Prompt](#) [Add Field](#)

OK Cancel

7. Click **A.FISCAL_YEAR - Fiscal Year**



Select a field

Alias	Record	Record Description	Show Fields
A	UOD_TRANS_DTL	UOD Transaction Detail GL	Show Fields

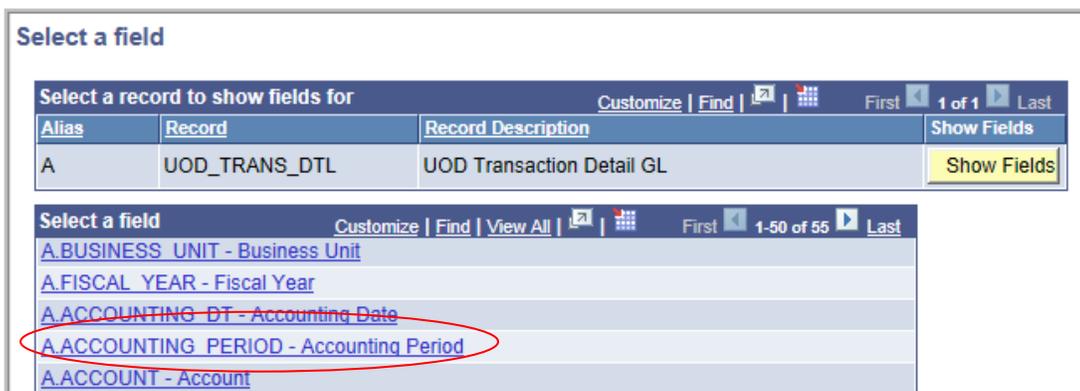
Select a field

- A.BUSINESS_UNIT - Business Unit
- A.FISCAL_YEAR - Fiscal Year**
- A.ACCOUNTING_DT - Accounting Date
- A.ACCOUNTING_PERIOD - Accounting Period
- A.ACCOUNT - Account

Note: can select any field in the record(s) of your query. You are not limited to using fields that you have already selected for your query.

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

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



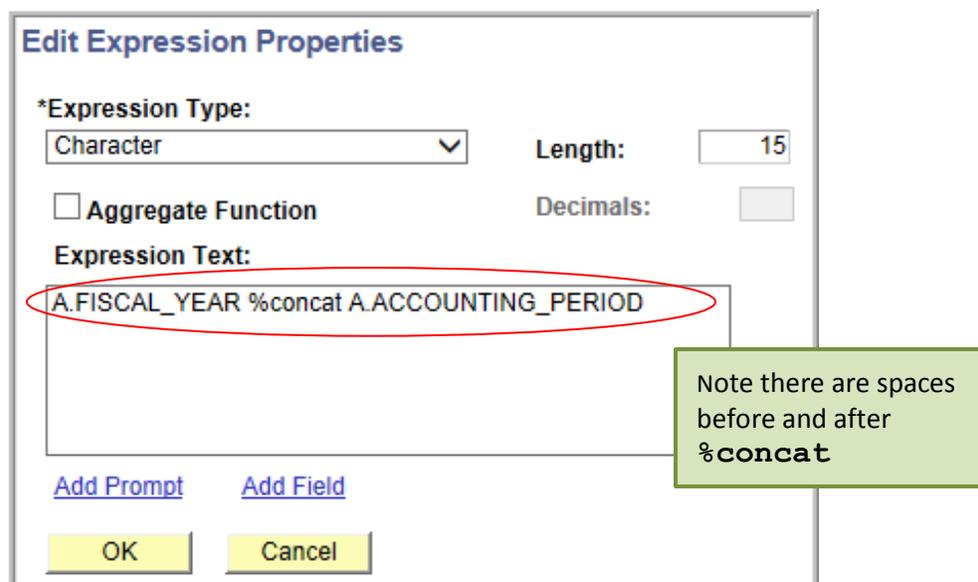
Select a field

Alias	Record	Record Description	Show Fields
A	UOD_TRANS_DTL	UOD Transaction Detail GL	Show Fields

Select a field

- A.BUSINESS_UNIT - Business Unit
- A.FISCAL_YEAR - Fiscal Year
- A.ACCOUNTING_DT - Accounting Date
- A.ACCOUNTING_PERIOD - Accounting Period**
- A.ACCOUNT - Account

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



Edit Expression Properties

*Expression Type: Character Length: 15

Aggregate Function Decimals:

Expression Text:

A.FISCAL_YEAR %concat A.ACCOUNTING_PERIOD

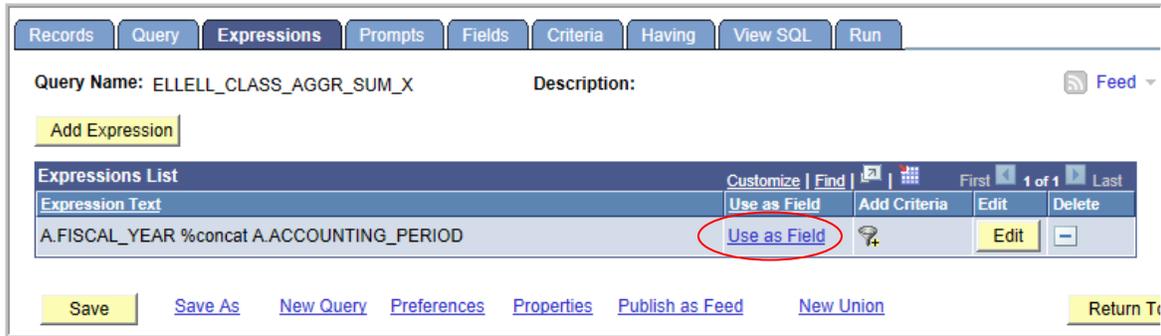
Add Prompt Add Field

OK Cancel

Note there are spaces before and after %concat

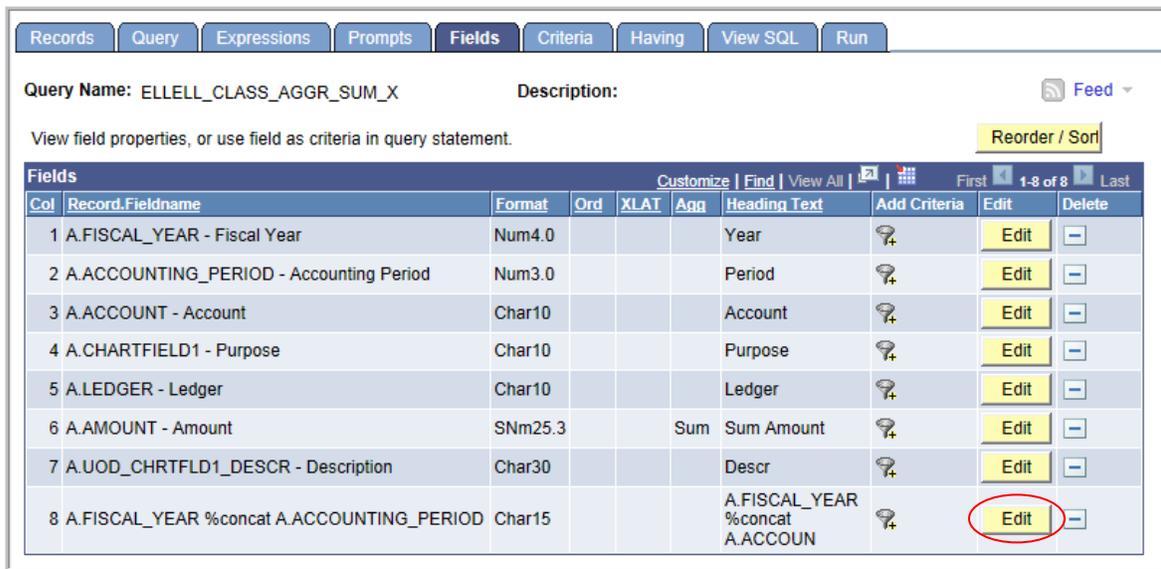
11. Click **OK**

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.

Query Name: ELLELL_CLASS_CONCAT_X Description:

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

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.BUSINESS_UNIT - Business Unit	equal to	UOD01	Edit	-
AND	A.FISCAL_YEAR - Fiscal Year	equal to	2013	Edit	-
AND	A.ACCOUNTING_PERIOD - Accounting Period	equal to	1	Edit	-
AND	A.CHARTFIELD1 - Purpose	like	MAST112%	Edit	-

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

22. Click the **Run** tab

View All | [Rerun Query](#) | [Download to Excel](#) | [Download to XML](#) First 1-24 of 24 Last

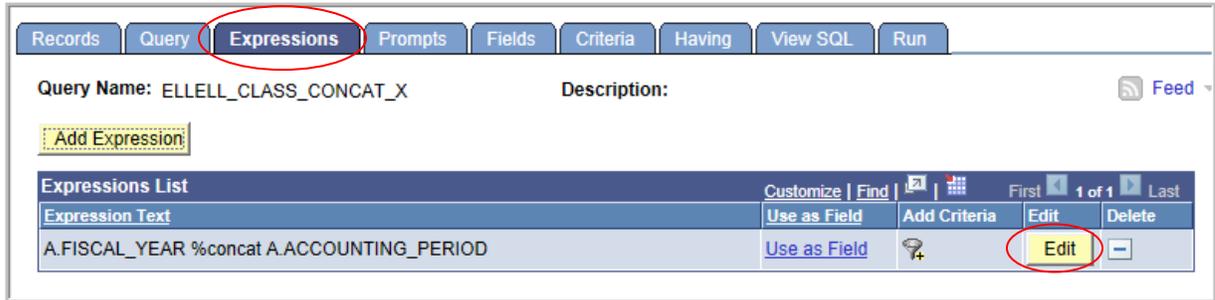
	Year	Period	Account	Purpose	Ledger	Sum Amount	Descr	FY AcctgPeriod
1	2013	1	143000	MAST112113	ACTUALS	5.000	SMSP-LEWES INSTRUCTION SUPP	20131
2	2013	1	140600	MAST112115	ACTUALS	29.960	SMSP SUPPORT	20131
3	2013	1	141000	MAST112115	ACTUALS	46.120	SMSP SUPPORT	20131
4	2013	1	144300	MAST112115	ACTUALS	-126.380	SMSP SUPPORT	20131
5	2013	1	145000	MAST112115	ACTUALS	-416.790	SMSP SUPPORT	20131
6	2013	1	145600	MAST112115	ACTUALS	127.830	SMSP SUPPORT	20131
7	2013	1	147700	MAST112115	ACTUALS	-62.060	SMSP SUPPORT	20131
8	2013	1	148300	MAST112115	ACTUALS	110.000	SMSP SUPPORT	20131
9	2013	1	148500	MAST112115	ACTUALS	340.180	SMSP SUPPORT	20131
10	2013	1	145900	MAST112116	ACTUALS	8.310	CEOE IT OPERATIONS	20131
11	2013	1	148400	MAST112116	ACTUALS	692.000	CEOE IT OPERATIONS	20131
12	2013	1	149600	MAST112116	ACTUALS	-69.990	CEOE IT OPERATIONS	20131

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.

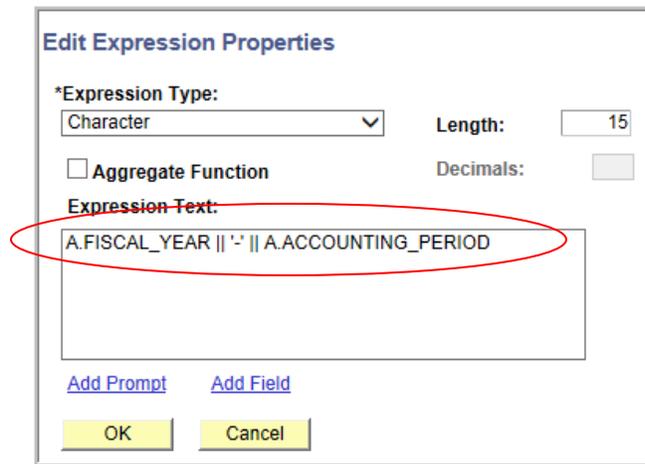


25. Omit the **%concat** and replace it with **||** on either side of a dash in single quotes.

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.



The | (pipes) character is found on your keyboard above the Enter key on the same key as the backslash.

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)

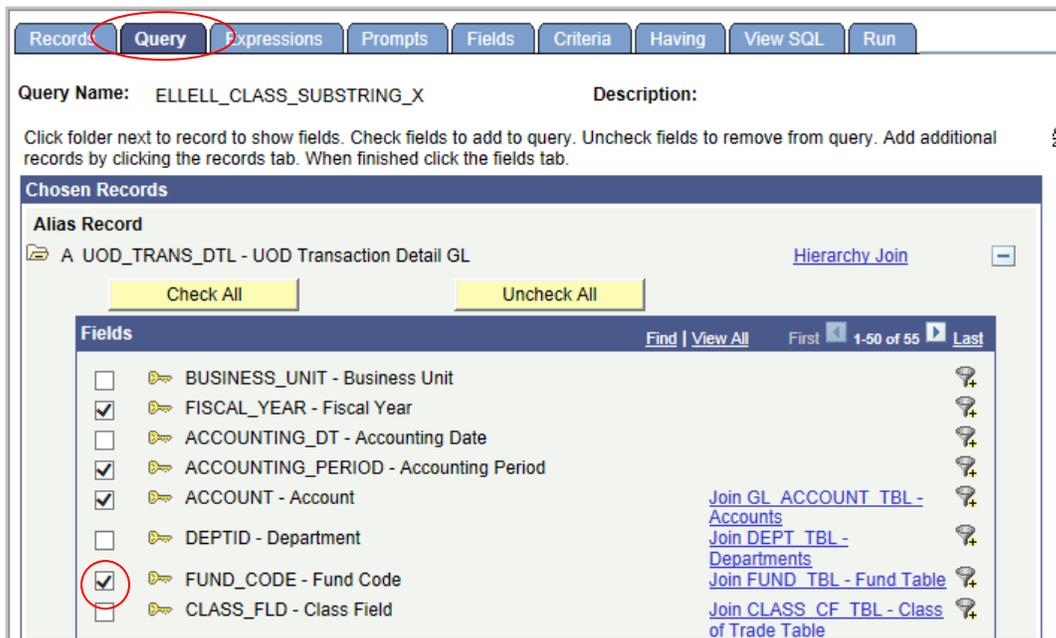
Decode allows you to create a field whose value is conditional upon a logical expression. For example, you may want to create a field that is populated with **Amount** under certain conditions and is blank under other conditions. The general format is the following:

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



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

Query Name: ELLELL_CLASS_SUBSTRING_X Description:

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

Chosen Records

Alias Record

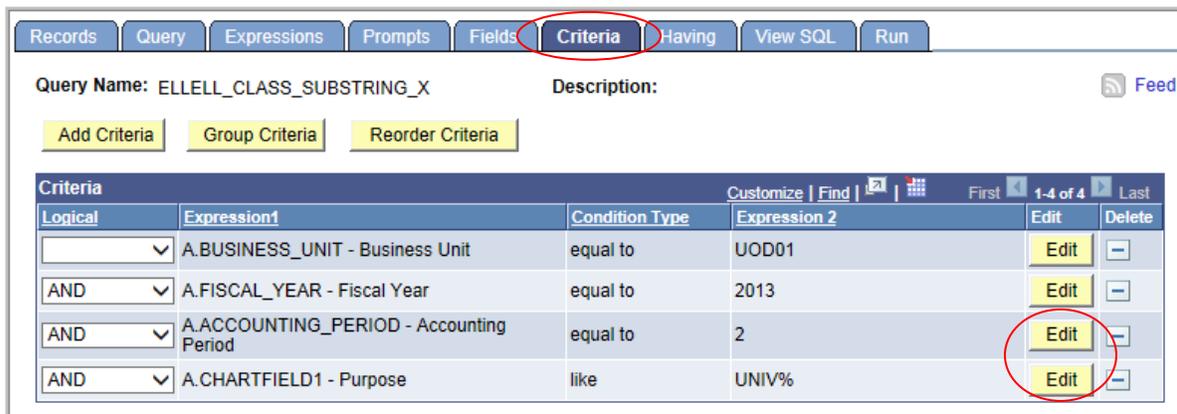
A UOD_TRANS_DTL - UOD Transaction Detail GL [Hierarchy Join](#)

Check All Uncheck All

Fields Find | View All First 1-50 of 55 Last

<input type="checkbox"/>	BUSINESS_UNIT - Business Unit	
<input checked="" type="checkbox"/>	FISCAL_YEAR - Fiscal Year	
<input type="checkbox"/>	ACCOUNTING_DT - Accounting Date	
<input checked="" type="checkbox"/>	ACCOUNTING_PERIOD - Accounting Period	
<input checked="" type="checkbox"/>	ACCOUNT - Account	Join GL ACCOUNT_TBL - Accounts
<input type="checkbox"/>	DEPTID - Department	Join DEPT_TBL - Departments
<input checked="" type="checkbox"/>	FUND_CODE - Fund Code	Join FUND_TBL - Fund Table
<input type="checkbox"/>	CLASS_FLD - Class Field	Join CLASS_CF_TBL - Class of Trade Table

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%**)



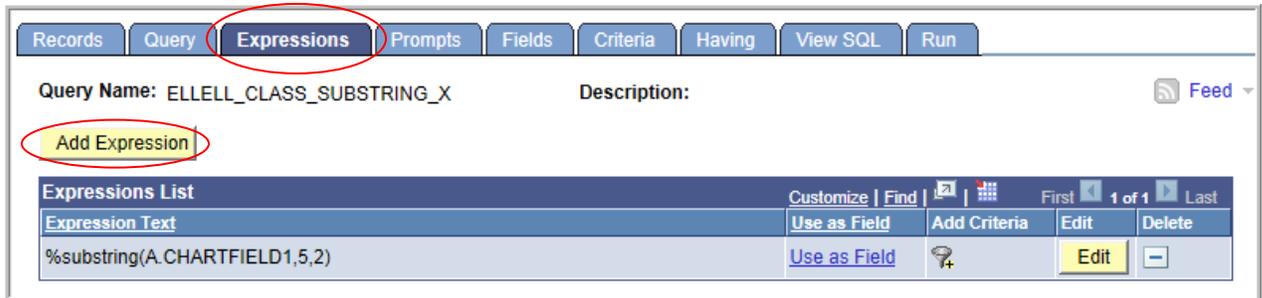
Records Query Expressions Prompts Fields **Criteria** Having View SQL Run

Query Name: ELLELL_CLASS_SUBSTRING_X Description: [Feed](#)

Add Criteria Group Criteria Reorder Criteria

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.BUSINESS_UNIT - Business Unit	equal to	UOD01	Edit	-
AND	A.FISCAL_YEAR - Fiscal Year	equal to	2013	Edit	-
AND	A.ACCOUNTING_PERIOD - Accounting Period	equal to	2	Edit	-
AND	A.CHARTFIELD1 - Purpose	like	UNIV%	Edit	-

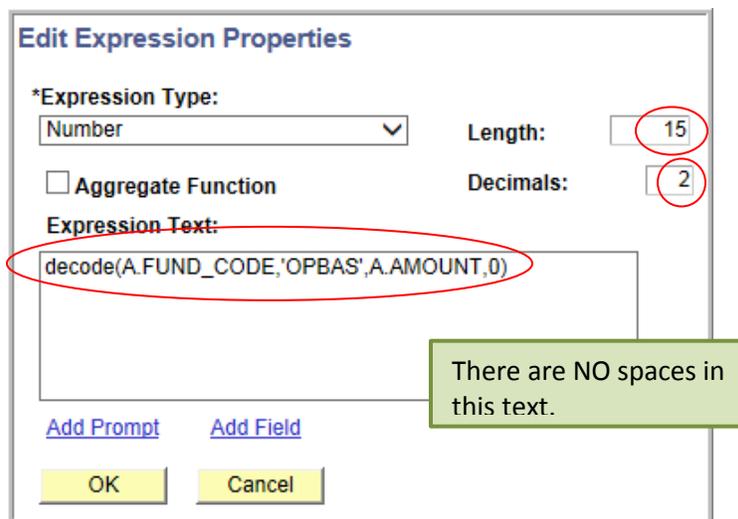
- Click the **Expressions** tab and then click the **Add Expression** button



- In **Expression Type** select **Number**

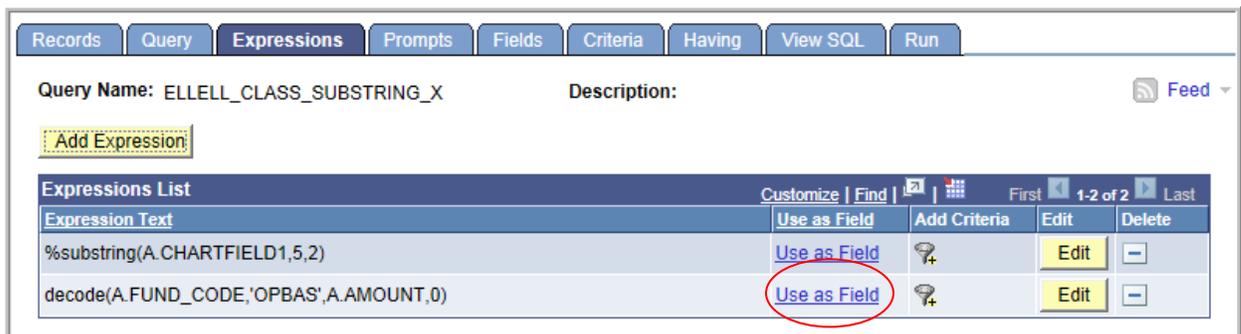
- Change **Length** to **15** and **Decimals** to **2**.

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



- Click **OK**.

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



- This opens the **Fields** tab

12. Click the **Edit** button for `decode(A.FUND_CODE,'OPBAS',A.AMOUNT,0)`.

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.FISCAL_YEAR - Fiscal Year	Num4.0				Year		Edit	
2	A.ACCOUNTING_PERIOD - Accounting Period	Num3.0				Period		Edit	
3	A.ACCOUNT - Account	Char10				Account		Edit	
4	A.CHARTFIELD1 - Purpose	Char10				Purpose		Edit	
5	A.LEDGER - Ledger	Char10				Ledger		Edit	
6	A.AMOUNT - Amount	SNm25.3			Sum	Sum Amount		Edit	
7	A.UOD_CHRTFLD1_DESCR - Description	Char30				Descr		Edit	
8	%substring(A.CHARTFIELD1,5,2)	Char2				Purpose 5, 6		Edit	
9	A.FUND_CODE - Fund Code	Char5				Fund		Edit	
10	decode(A.FUND_CODE,'OPBAS',A.AMOUNT,0)	Num13.2				decode(A.FUND_CODE,'OPBAS',A.A		Edit	

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

Edit Field Properties

Field Name: `decode(A.FUND_CODE,'OPBAS',A.AMOUNT,0)`

Heading

No Heading RFT Short
 Text RFT Long

Heading Text:

*Unique Field Name:

Aggregate

None
 Sum
 Count
 Min
 Max
 Average

14. Click **OK**

15. Click the **Run** tab.

OOOOOPS – an error!

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

This "group function" error means there's a problem with a sum on one of the fields.

[Rerun Query](#)

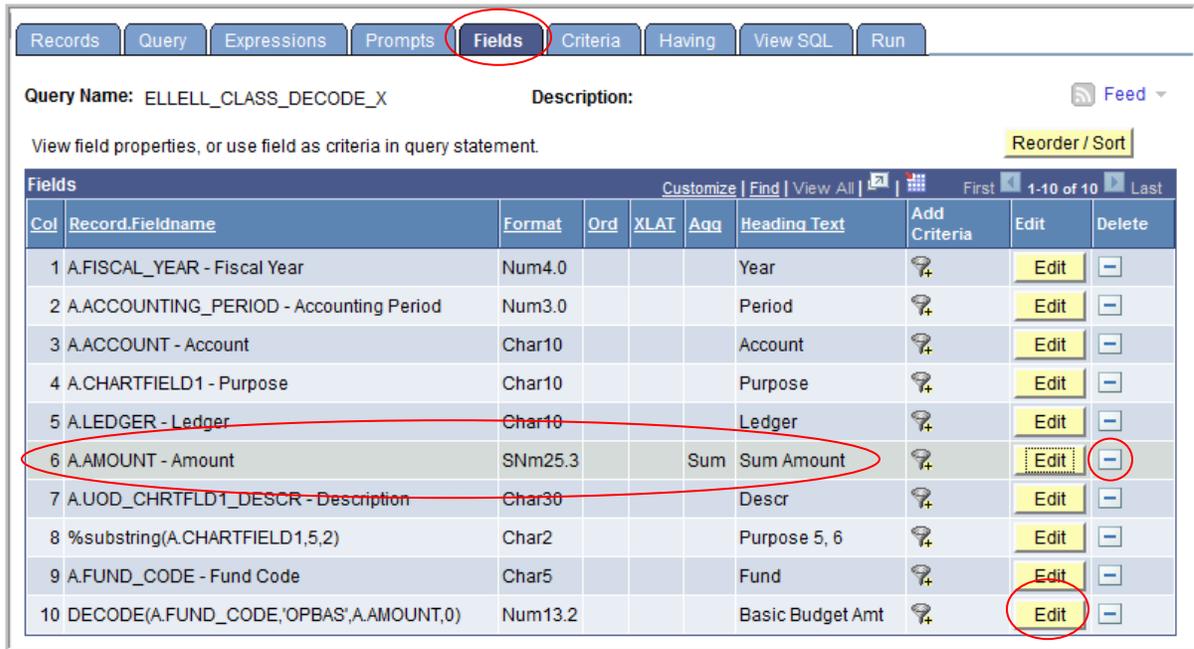
A SQL error occurred. Please consult your system log for details.
 Error in running query because of SQL Error, Code=934, Message=ORA-00934: group function is not allowed here (50,380)

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  button

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



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

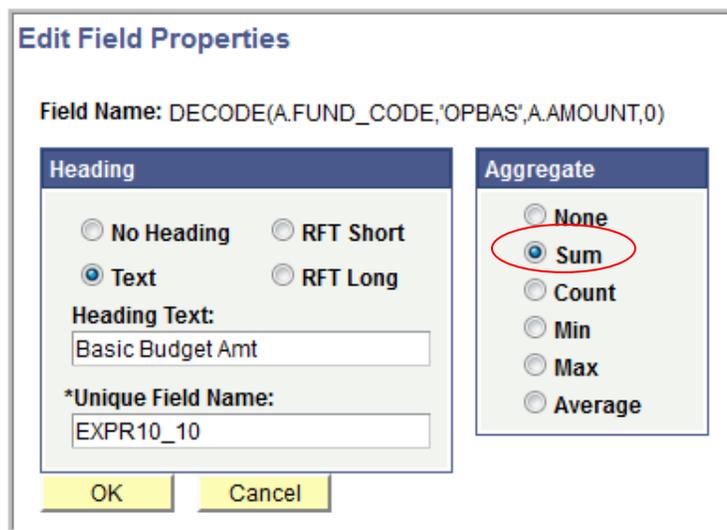
Query Name: ELLELL_CLASS_DECODE_X Description: Feed

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

Col	Record.FieldName	Format	Ord	XLAT	Aqq	Heading Text	Add Criteria	Edit	Delete
1	A.FISCAL_YEAR - Fiscal Year	Num4.0				Year		Edit	
2	A.ACCOUNTING_PERIOD - Accounting Period	Num3.0				Period		Edit	
3	A.ACCOUNT - Account	Char10				Account		Edit	
4	A.CHARTFIELD1 - Purpose	Char10				Purpose		Edit	
5	A.LEDGER - Ledger	Char10				Ledger		Edit	
6	A.AMOUNT - Amount	SNm25.3			Sum	Sum Amount		Edit	
7	A.UOD_CHRTFLD1_DESCR - Description	Char30				Descr		Edit	
8	%substring(A.CHARTFIELD1,5,2)	Char2				Purpose 5, 6		Edit	
9	A.FUND_CODE - Fund Code	Char5				Fund		Edit	
10	DECODE(A.FUND_CODE,'OPBAS',A.AMOUNT,0)	Num13.2				Basic Budget Amt		Edit	

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

20. Click **OK**



Edit Field Properties

Field Name: DECODE(A.FUND_CODE,'OPBAS',A.AMOUNT,0)

Heading	Aggregate
<input type="radio"/> No Heading <input type="radio"/> RFT Short <input checked="" type="radio"/> Text <input type="radio"/> RFT Long Heading Text: <input type="text" value="Basic Budget Amt"/> *Unique Field Name: <input type="text" value="EXPR10_10"/>	<input type="radio"/> None <input checked="" type="radio"/> Sum <input type="radio"/> Count <input type="radio"/> Min <input type="radio"/> Max <input type="radio"/> Average

OK Cancel

21. Click the **Run** tab

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

Year	Period	Account	Purpose	Ledger	Descr	Purpose 5, 6	Fund	Basic Budget Amt
1	2013	1 146000	UNIV112166	ACTUALS	INDIRECT COST/CASB	11	OPBAS	2500.00
82	2013	1 144300	UNIV112535	ACTUALS	CHRYSLER OPERATIONAL COSTS	11	OPBAS	133.50
83	2013	1 148500	UNIV112535	ACTUALS	CHRYSLER OPERATIONAL COSTS	11	OPBAS	180.04
84	2013	1 151800	UNIV112535	ACTUALS	CHRYSLER OPERATIONAL COSTS	11	OPBAS	188.45
85	2013	1 154800	UNIV112535	ACTUALS	CHRYSLER OPERATIONAL COSTS	11	OPBAS	105.00
86	2013	1 149000	UNIV175181	ACTUALS	SPECIAL TUIT HLDG	17	OPBAL	0.00
87	2013	1 154800	UNIV175191	ACTUALS	DIVERSITY TASK FORCE	17	OPBAL	0.00
88	2013	1 144600	UNIV175216	ACTUALS	R/E FIN OFC YEAR END ENTRIES	17	OPBAL	0.00

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:

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
ELLELL_CLASS_AGGR_SUM_X		Private		HTML	Excel	XML	Schedule	Favorite
ELLELL_CLASS_CRITERIA	query class exercise	Private		HTML	Excel	XML	Schedule	Favorite
ELLELL_CLASS_DECODE		Private		HTML	Excel	XML	Schedule	Favorite
ELLELL_CLASS_JOINS	query class exercise	Private		HTML	Excel	XML	Schedule	Favorite
ELLELL_CLASS_SUBSTRING_X		Private		HTML	Excel	XML	Schedule	Favorite

Query Manager search page:

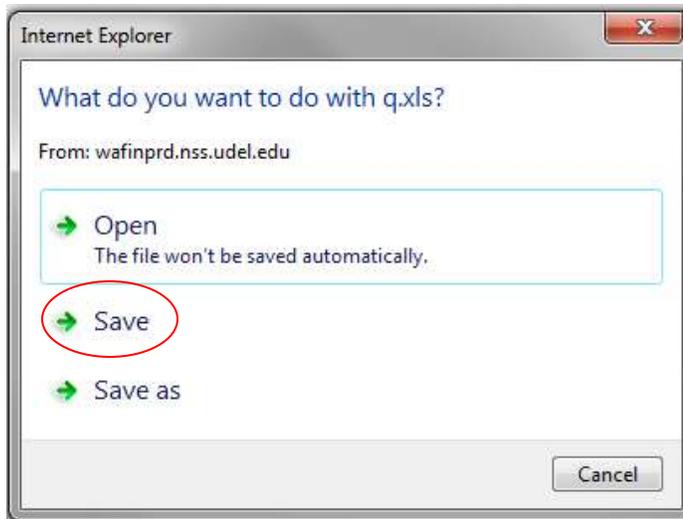
Query Manager
 Enter any information you have and click Search. Leave fields blank for a list of all values.
[Find an Existing Query](#) | [Create New Query](#)

*Search By: begins with
 [Advanced Search](#)

Search Results
 *Folder View:
 *Action:

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input type="checkbox"/>	ELLELL_CLASS_AGGR_SUM_X		Private		Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	ELLELL_CLASS_CRITERIA	query class exercise	Private		Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	ELLELL_CLASS_DECODE		Private		Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	ELLELL_CLASS_JOINS	query class exercise	Private		Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	ELLELL_CLASS_SUBSTRING_X		Private		Edit	HTML	Excel	XML	Schedule

- When this dialog box appears, click **Save**



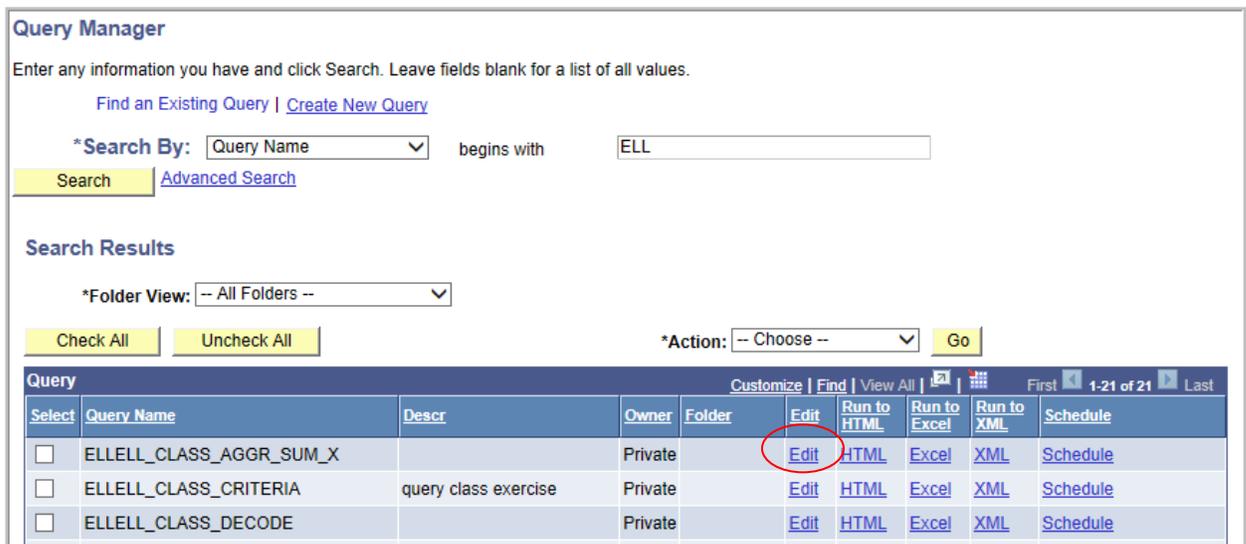
- Click **Open** when this message appears at the bottom of your screen:



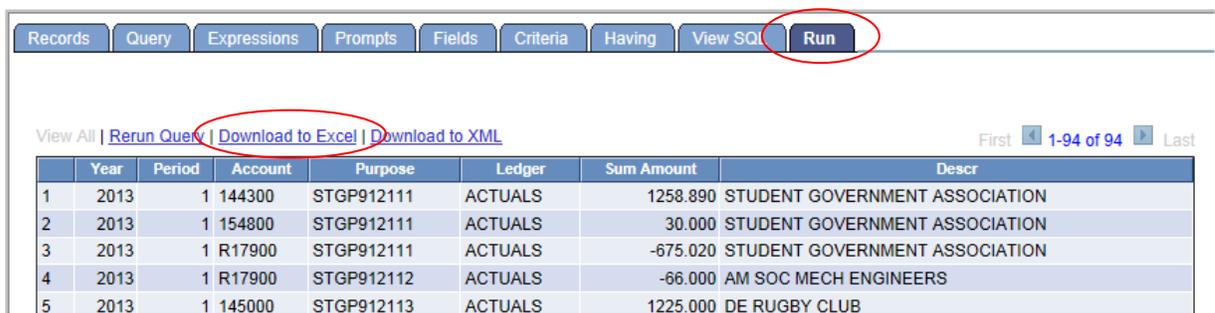
- Save this new Excel document and rename it something meaningful to you.

Run tab in Query Manager:

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



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



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.

--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)

 Sort button	Click the Sort button once to list fields in alphabetical order. Click the button again to return to original sort.
Alias	The alias name that the program automatically assigns to the chosen records.
Hierarchy Join	Click this link to join a child table to its parent table.
Check All Fields	Click this button to check all fields in the record. Once you select a field, the 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.
Uncheck All Fields	Click this button to clear all fields in the record.
Field Names	Select the box located to the left of each field that you want to add to your query content.
Related Record Join	Click this link to join two records based on a shared 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.
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 program sorts rows based on this field first. The second sort field selected is numbered <i>2</i> , and so on. A descending sort order can also be specified. The letter <i>D</i> appears if sorting fields in descending order is selected.
XLAT (translate)	Specifies which translate value 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 tell PS 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 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: <ul style="list-style-type: none"> • 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.
Agg (aggregate)	Aggregate function for each field listed.
Heading Text	The heading assigned to appear at the top of the column for the query output for each field listed.
Edit	Click this button to format the query output (for example, to change column headings, display translate table values in place of codes, or specify a sort order).
ReOrder/Sort	Click this button to display the Edit Field Ordering page, which enables you change the column order and/or sort order for multiple fields.

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:

EZQ_TRANS_NONBUDPURPNOPO

Enter Purpose:

Starting Fiscal Year:

Starting Acctg Period:

Ending Fiscal Year:

Ending Accounting Period:

Favorites | Main Menu > Reporting Tools > Query > Query Manager

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

Query Name: EZQ_TRANS_NONBUDPURPNOPO Description: Non Budget Trans No PO Purp Feed

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.BUSINESS_UNIT - Business Unit	equal to	UOD01	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
AND	A.CHARTFIELD1 - Purpose	equal to	:1	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
AND	A.FISCAL_YEAR - Fiscal Year	between	:2 AND :4	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
AND	A.FISCAL_YEAR*1000 +A.ACCOUNTING_PERIOD	not less than	(:2*1000)+:3	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
AND	A.FISCAL_YEAR*1000 +A.ACCOUNTING_PERIOD	not greater than	(:4*1000)+:5	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
AND	A.STATISTICS_CODE - Statistics Code	not in list	('ENU','ENP')	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
AND	A.ACCOUNTING_PERIOD - Accounting Period	not equal to	0	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
AND	A.ACCOUNTING_PERIOD - Accounting Period	not equal to	999	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
AND	(A.LEDGER - Ledger	equal to	ACTUALS	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
OR	A.LEDGER - Ledger	equal to	'')	<input type="button" value="Edit"/>	<input type="button" value="[-"/>
AND	A.JOURNAL_ID - Journal ID	not equal to	'')	<input type="button" value="Edit"/>	<input type="button" value="[-"/>

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.)