

University of Houston-Clear Lake

Query Viewer

Reporting Tools

0125529
7/17/2008

Change Control:

Version	Update/Initials
1.0	Created/SAE

I. Process Overview

Use this process to run a query and to set a query to your query favorites.

II. Process Description & Navigation

Main Menu > Reporting Tools > Query > Query Viewer

1. Basic Search (begins with), you may select from the options:
 - a. Description
 - b. Owner (Private/Public, not recommend for basic search)
 - c. Query Name (default)
 - d. Uses Field Name (i.e. technical field name, such as RECRUITER_ID)
 - e. Uses Record Name (i.e. table name, such as PRSPCT_RECRTER)
 - f. Currently we do not have a business process for Folder Name or Type. Access Group Name would not be very useful for a non-technical search.
 - g. After selecting a Search By option, enter the appropriate information.

Query Viewer

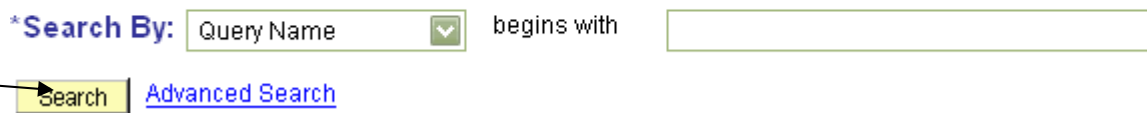
Enter any information you have and click Search. Leave fields blank for a list of all values.



2. Advanced Search: if you do not know the exact query name and putting in part of the query name or description yields a large number of results, you may wish to use Advanced Search. Select the hyperlinked advanced search.

Query Viewer

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



Query Viewer

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

Query Name:	<input type="text" value="begins with"/>	<input type="text"/>
Description:	<input type="text" value="begins with"/>	<input type="text"/>
Uses Record Name:	<input type="text" value="begins with"/>	<input type="text"/>
Uses Field Name:	<input type="text" value="begins with"/>	<input type="text"/>
Access Group Name:	<input type="text" value="begins with"/>	<input type="text"/>
Folder Name:	<input type="text" value="begins with"/>	<input type="text"/>
Owner:	=	<input type="text" value=""/>

When using the IN or BETWEEN operators, enter comma separated values without quotes. i

[Basic Search](#)

3. You may change the search criteria (begins with), and you may enter information in any of the fields. You may also use the % sign for characters you are uncertain about. For example you may be looking for a
 - a. **Owner is:** "public."
 - b. **Query name begins with:** You may know UHCL_PROS_NOT_APPL or UHCL_PROSPECTS_NOT_APPL in the name, so you may enter in the query name UHCL_PROS%APP.
 - c. **Description contains:** If you knew the description contained "phone," for description you could change the search criteria to "contains" and enter into the field "phone."
 - d. **Search:** when you have entered what you know.

Query Viewer

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

a. **Query Name:** begins with

b. **Description:** contains

Uses Record Name: begins with

Uses Field Name: begins with

Access Group Name: begins with

Folder Name: begins with

c. **Owner:** =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

d. [Basic Search](#)

Search Results

Folder View: -- All Folders --

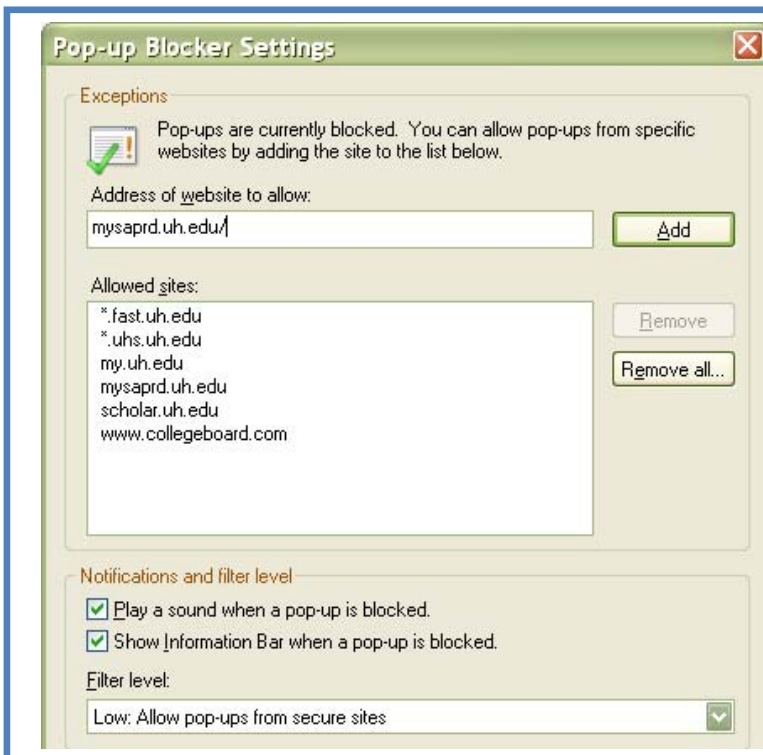
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
UHCL_PROSPECTS_NOT_APPLIED	phone and emails	Public		HTML	Excel	Schedule	Favorite
UHCL_PROSPECTS_NOT_APPL_GRAD	phone and emails	Public		HTML	Excel	Schedule	Favorite
UHCL_PROSPECTS_NOT_APPL_UGRD	phone and emails	Public		HTML	Excel	Schedule	Favorite
UHCL_PROS_NOT_APPLIED_DE1	phone and email	Public		HTML	Excel	Schedule	Favorite

This narrowed the results to 4.

4. Run the query:

- 1) Select HTML or EXCEL hyperlink next to the query name depending on how you want the results. See Tip Box 1 for running to EXCEL.

Tip Box 1



Tip: you may need to hold down the Ctrl key even if your pop-up blocker is turned off for saprd.uh.edu when running to EXCEL.

To preset pop-up blocker settings, in Microsoft Internet Explorer, in the menu bar select Tools > Pop-up Blocker > Pop-up Blocker Settings. Type "mysaprd.uh.edu" in the Address of website to allow box and click Add.

Make sure the Filter Level is set to "Low."

5. Schedule query: You may set-up a query to run on a schedule and have a link emailed to you for the results on a daily basis.
 - a. Click on Schedule next to the query you wish to schedule.
 - b. Name the run control ID a simple, unique name to save your run settings (required). In the example below, the name is “prospectnotapplied.”

Scheduled Query

[Find an Existing Value](#) [Add a New Value](#)

Query Name:

Run Control ID:

[Find an Existing Value](#) | [Add a New Value](#)

- c. Click “Add.”
- d. If there are prompts, fill in as needed. Click OK.

UHCL_PROSPECTS_NOT_APPLIED

Academic Career: 

Admit Term: 

Recruiting Status Date: 

- e. Type in the description (required). Click OK.

Schedule Query

Run Control ID: prospectnotapplied

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

Query Name: UHCL_PROSPECTS_NOT_APPLIED

Description: type description here

[Update Parameters](#)

Prompt Name	Value
ACAD_CAREER	UGRD
ADMIT_TERM	1760
RECR_STATUS_DT	2008-06-01

OK

Cancel

Apply

f. Set-up Process Scheduler Request.

Process Scheduler Request

User ID: 0125529

ii.

Run Control ID: prospectnotapplied

Server Name:

Run Date: 07/17/2008

i.

Recurrence: WEEKDAY 06:4

Run Time: 6:40:00AM

[Reset to Current Date/Time](#)

Time Zone:

iii.

iv.

v.

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Scheduled Query Program	PSQUERY	Application Engine	Web	XLS	Distribution

OK

Cancel

- i. Recurrence: select a time for the query to be run on Weekdays or M-F.
- ii. Run date: If selecting a morning recurrence intended for tomorrow, you may want to change this to tomorrow's date.
- iii. Type: Web.
- iv. Format: XLS.
- v. Distribution: Click on Distribution.
 - 1) Select Email Web Report box.

- 2) Enter a subject.
- 3) Enter a message text if desired.
- 4) The report link will automatically be emailed to the user ID of the person scheduling the query.
- 5) Click OK.

Distribution Detail

Process Name: PSQUERY

Process Type: Application Engine

Folder Name:

Distribute To

ID Type	*Distribution ID
User <input type="text" value="User"/>	<input type="text" value="0125529"/> <input type="button" value="Search"/> <input type="button" value="+"/> <input type="button" value="-"/>

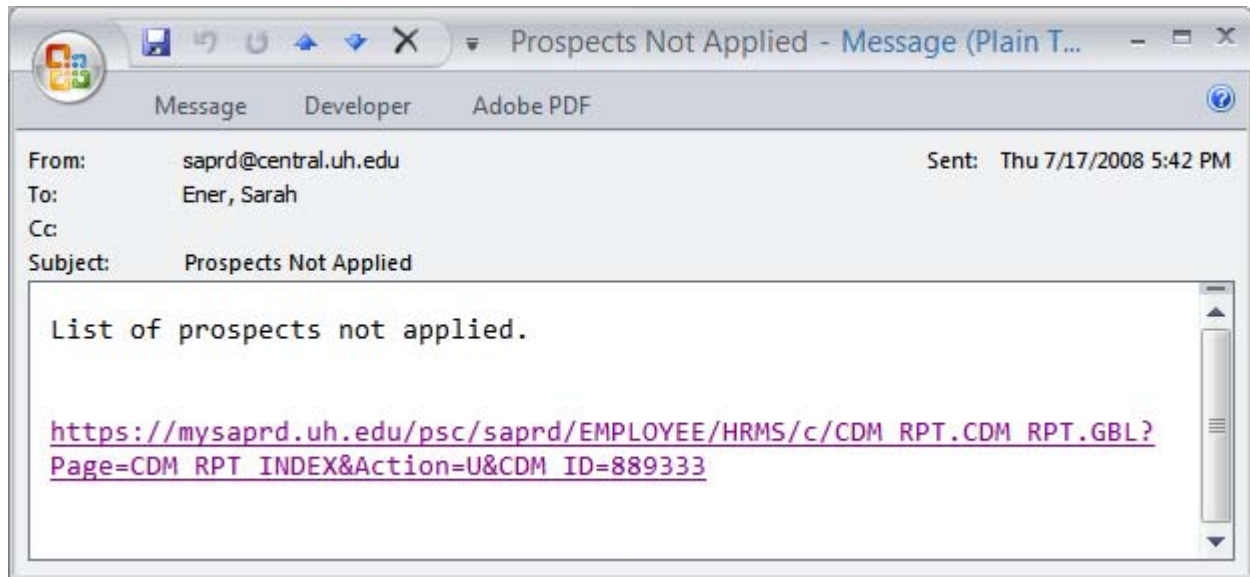
Email Only

Email Subject: **Email With Log** **Email Web Report**

Message Text:

Email Address List:

- g. Click OK when the set-up is complete.
- h. You will receive an email in your inbox:



- i. Click on the link in your email.
- j. A log-in page will open. Log into PeopleSoft.
- k. Click on the file named after the query.

Report

Report ID: 889333 **Process Instance:** 2799440 [Message Log](#)
Name: PSQUERY **Process Type:** Application Engine
Run Status: Success

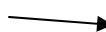
Scheduled Query Program

Distribution Details

Distribution Node: PSUNX **Expiration Date:** 08/16/2008

File List

Name	File Size (bytes)	Datetime Created
Redirected Terminal Output	276	07/17/2008 5:41:39.000000PM CDT
UHCL_PROSPECTS_NOT_APPLIED-2799440.xls	64,000	07/17/2008 5:41:39.000000PM CDT



Distribute To

Distribution ID Type	*Distribution ID
User	0125529

- l. A dialogue box will appear asking if you want to open or save the file.
- m. To cancel a scheduled query, navigate: People Tools > Process Scheduler > Process Monitor.
 - 1) Look for a Queued process named PSQUERY. (You may enter Run Status: Queued and PSQUERY in the "Name" field and refresh the page.)

Process List **Server List**

View Process Request For

User ID: 0125529 Type: [] Last: 1 Days Refresh

Server: [] Name: PSQUERY Instance: [] to []

Run Status: Queued Distribution Status: [] Save On Refresh

Process List Customize | Find | View All | First 1 of 1 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	2802507		Application Engine	PSQUERY	0125529	07/21/2008 6:40:00AM CDT	Queued	N/A	Details

Select All Deselect All

Delete Request Cancel Request Hold Request Restart Request

- 2) Select Details. If you have more than one query scheduled, check the Run Control ID.
- 3) After ensuring it is the correct process, select Cancel.

Process Detail

Process

Instance: 2802507 Type: Application Engine

Name: PSQUERY Description: Scheduled Query Program

Run Status: Cancel Distribution Status: N/A

Run Update Process

Run Control ID: prospectnotapplied ○ Hold Request

Location: Server ○ Queue Request

Server: ● Cancel Request

Recurrence: WEEKDAY 06:40AM ○ Delete Request

○ Restart Request

Date/Time Actions

Request Created On: 07/18/2008 6:40:22AM CDT [Parameters](#) Transfer

Run Anytime After: 07/21/2008 6:40:00AM CDT [Message Log](#) [View Locks](#)

Began Process At: [Batch Timings](#)

Ended Process At: View Log/Trace

OK Cancel

b.

c.

6. My Favorite Queries:
 - a. Select the Favorite link.

Search Results

Folder View: -- All Folders --

Query							
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
UHCL_PROSPECTS_NOT_APPLIED	phone and emails	Public		HTML	Excel	Schedule	Favorite
UHCL_PROSPECTS_NOT_APPL_GRAD	phone and emails	Public		HTML	Excel	Schedule	Favorite
UHCL_PROSPECTS_NOT_APPL_UGRD	phone and emails	Public		HTML	Excel	Schedule	Favorite
UHCL_PROS_NOT_APPLIED_DE1	phone and email	Public		HTML	Excel	Schedule	Favorite

- b. The query will add to the My Favorite Queries' box.

Search Results

Folder View: -- All Folders --

Query							
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
UHCL_PROSPECTS_NOT_APPLIED	phone and emails	Public		HTML	Excel	Schedule	Favorite
UHCL_PROSPECTS_NOT_APPL_GRAD	phone and emails	Public		HTML	Excel	Schedule	Favorite
UHCL_PROSPECTS_NOT_APPL_UGRD	phone and emails	Public		HTML	Excel	Schedule	Favorite
UHCL_PROS_NOT_APPLIED_DE1	phone and email	Public		HTML	Excel	Schedule	Favorite

My Favorite Queries									
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to Crystal	Schedule	Remove	
UHCL_APPL_FEE_CC_RPT	Daily CC report	Public		HTML	Excel		Schedule		
UHCL_PROSPECTS_NOT_APPL_UGRD	phone and emails	Public		HTML	Excel	Crystal	Schedule		
UHCL_TRNS_CRDT_NOT_POST	Some acctpd courses not posted	Public		HTML	Excel		Schedule		

[Clear Favorites List](#)

- c. To delete/remove a query from My Favorite Queries' box just click on the - button.