

## INTRODUCTION

You have completed the first lesson 'View a Query' and you are ready to proceed to learning the Advanced search method. This document is to be used as a reference guide and used in conjunction with the associated User Productivity Kit (UPK) – View a Query Using a Prompt.

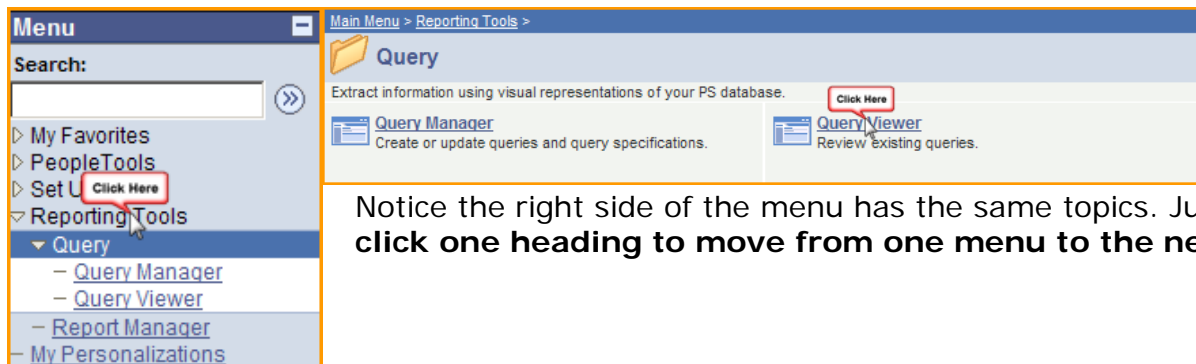
This class is designed for CSS, FMS, and HCM. The instructions used to create the material refer to the use of Internet Explorer; other browsers might use different methods and commands.

Advanced search introduces two new concepts: conditions and prompts. Conditions are used with search criteria to limit the results you want to see when searching for query; in advanced search there are many more conditions besides the "begins with" condition you are limited to in Basic search. Adding a prompt allows you to further refine a query.

If using this guide as a reference tool, sign in to the correct database (CSS or FMS). The navigation menu that appears below may look very different from your navigation menu; a user's security access determines the components which are available to them.

Once signed in to the system, **select Reporting Tools** from the menu pagelet.

Next, **select Query Viewer**.



The screenshot displays the PeopleSoft navigation interface. On the left, a 'Menu' sidebar is visible with a search field and a list of categories: 'My Favorites', 'PeopleTools', 'Set U', 'Reporting Tools', 'Query', 'Report Manager', and 'My Personalizations'. The 'Reporting Tools' category is expanded, and the 'Query' sub-category is selected. The main content area shows the 'Query' section, which includes a description: 'Extract information using visual representations of your PS database.' Below this, there are two links: 'Query Manager' (with the description 'Create or update queries and query specifications.') and 'Query Viewer' (with the description 'Review existing queries.'). Red boxes and arrows highlight the 'Click Here' text next to each link in the main content area.

Notice the right side of the menu has the same topics. Just **click one heading to move from one menu to the next.**

## Advanced Search

An *Advanced search* page will appear. To access an advanced search, **click Advance Search**.

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

\*Search By: Query Name  begins with

[Advanced Search](#)

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

Query Name:  begins with

Description:  begins with

Uses Record Name:  begins with

Uses Field Name:  begins with

Access Group Name:  begins with

Folder Name:  begins with

Owner: =

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

[Basic Search](#)

The Advanced search page criteria are the same as the Basic search by criteria.

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

Query Name:  begins with

Description:

Uses Record Name:

Uses Field Name:

Access Group Name:

Folder Name:

Owner: =

Criteria are defined using Condition Types

As mentioned earlier, conditions include

**Condition Types (non-symbol):**

*Begins With* – applies to the start of <The query name begins with HR>

*Between* – lets you find cases in which the criterion is between two values  
<X is between 250 and 500.>

*Contains* – have within <The query name contains PO>

*In* – the criterion is in a list of values <X is in the list of 5, 10, 15, 20, 25. >

*Not =* - the value is not equal to what you enter <X not= 500, only those cases in which X is not 500 are found.>

For this example, the question being asked is, “what are the purchase orders (PO’s), less than \$1500, for the BG@100 department?”

Using the Advanced search method allows viewers to narrow a search, by adding detail to the criteria.

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

Query Name: contains PO  
 Description: contains 1500  
 Uses Record Name: begins with  
 Uses Field Name: begins with  
 Access Group Name: begins with  
 Folder Name: begins with  
 \*Query Type: = User  
 Owner: =

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

Search Clear Basic Search

**Set criteria conditions:**

**Query Name: contains  
Description: contains**

After the information has been placed in the appropriate fields **click Search.**

The system matched one result to the search criteria. **Click HTML.**

**Search Results**

\*Folder View: -- All Folders --

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
BG_PO_REQ_LT_1500	Requisitions less than 1500	Public		HTML	Excel	Schedule	Favorite

No results are returned because we must enter the values to answer the prompts at the top of the page. This particular query is asking for prompts. Prompts are a great tool to use to limit the results to just the information you need. When you run a query with a prompt, a prompt page requests the required values. In this example, the data needed is a DCC (Department Cost Center), Date From and Date To.

If the DCC is unknown, **click the look up** button.

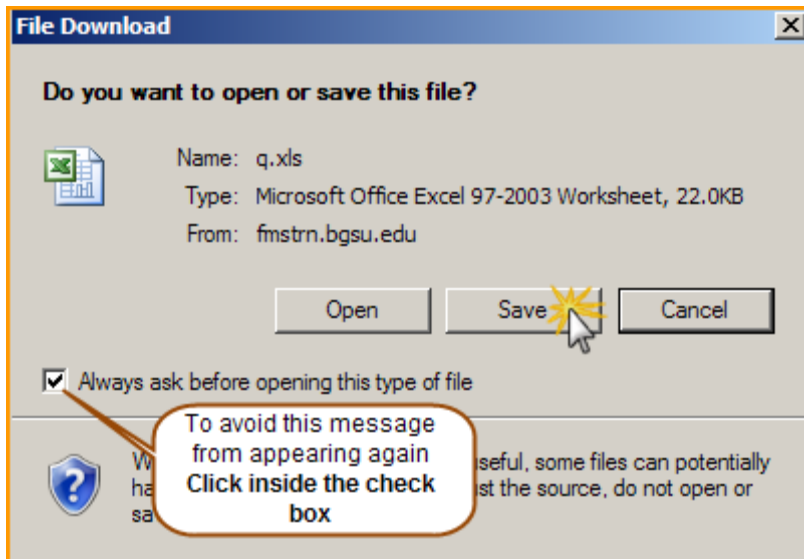
**Enter a Date From. Enter a Date To.**

After the appropriate information has been entered, **click View Results.**

After the results appear, the Excel Spreadsheet link appears.

**Click Excel Spreadsheet.**

When you clicked the link to Excel spreadsheet the system will prompt you through a series of system generated messages and questions.

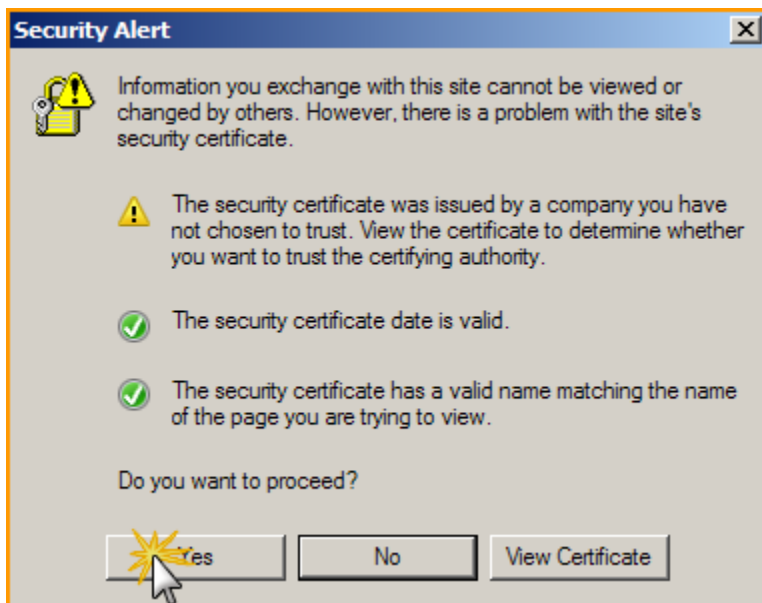


The first message asks if you want to open or save the file. For this example,

**Click Save.**

\*FYI – click the check box to avoid this message from appearing in the future.\*

The second message that appears is a Security Alert.

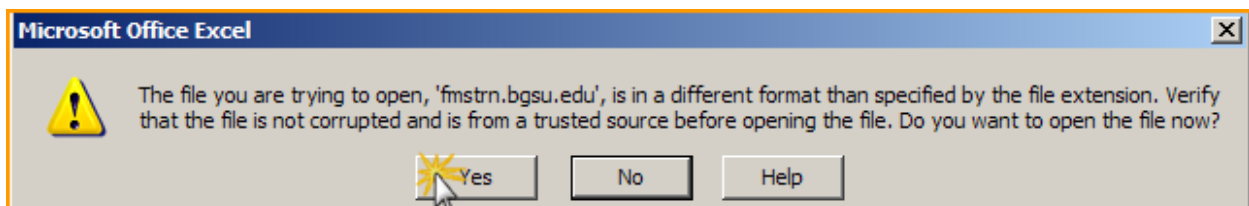


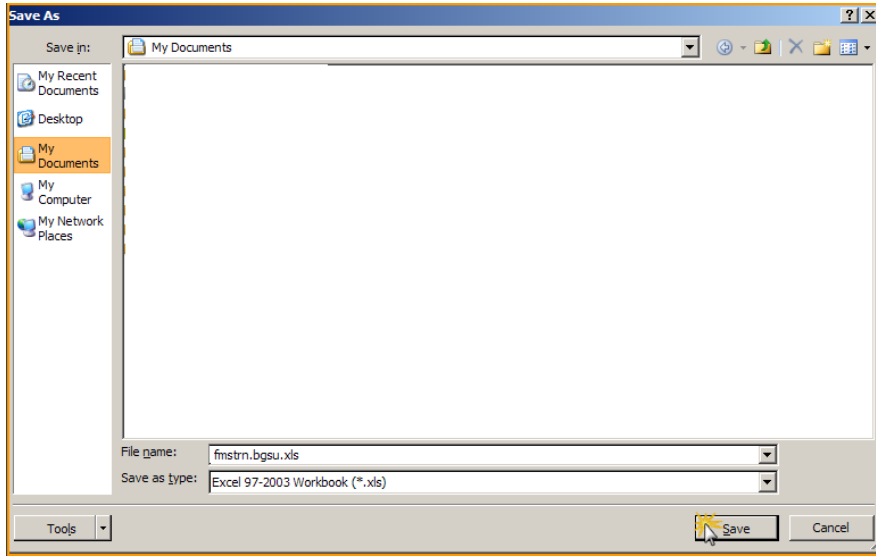
The description explains that the information you are about to exchange from on site to another can not be viewed or changed by others. In addition, the site's security certificate is not issued by a company among the user's trusted sites.

No need to worry, the PeopleSoft setup is OK and can be a trusted site.

**Click Yes.**

The final message you receive explains that the file is in a different format and the file may not be from a trustworthy source. You know that the file is from a trusted source, **click Yes.**





The system will automatically name the file and determine the file's location.

In this example, we will leave the system generated file location and name.

**Click Save.**

Results are displayed in Excel. Now that you have saved the query to a specific location, close Excel.

**Click the "X" in the top right corner.**

Req ID	Status	Req Date	Origin	Requester
0000013480	Complete	1/17/2008	ONL	AMANI
0000013492	Complete	1/18/2008	LOW	AMANI
0000013492	Complete	1/18/2008	LOW	AMANI
0000013492	Complete	1/18/2008	LOW	AMANI
0000014377	Complete	2/15/2008	LOW	AMANI
0000014377	Complete	2/15/2008	LOW	AMANI
0000014377	Complete	2/15/2008	LOW	AMANI
0000014441	Complete	2/19/2008	LOW	AMANI
0000014715	Complete	2/28/2008	CNF	ANITAB
0000015011	Complete	3/10/2008	LOW	ANITAB
0000015011	Complete	3/10/2008	LOW	ANITAB
0000015202	Complete	3/19/2008	LOW	AMANI
0000015202	Complete	3/19/2008	LOW	AMANI
0000015202	Complete	3/19/2008	LOW	AMANI
0000015945	Complete	4/14/2008	LOW	AMANI
0000015969	Complete	4/15/2008	LOW	AMANI
0000016431	Complete	4/29/2008	CNF	ANITAB
0000016431	Complete	4/29/2008	CNF	ANITAB
0000020160	Complete	8/28/2008	CNF	ANITAB