Towson University

PEOPLESOFT FINANCIALS QUERY MANUAL

Contents

Query Overview:

What is a query?

PeopleSoft Query is a reporting tool that enables data to be written directly on screen and enables the creation of (depending on security) ad-hoc reporting. Queries extract data from stored records based on field selections and criteria written. Predefined, public, secured queries have been written for the end users. The queries contain prompts to allow users to easily enter their criteria.

Queries can be as simple or as complex as needed; and can be one-time queries or saved queries used repeatedly.

Additional Query Information:

Before getting started with Query, remember the following:

- **Use a single mouse click** when working with Query. There is no need to double click on fields or tabs.

- **Do not use the back button** on the browser when navigating through PeopleSoft.

Before using the Query tool, you should understand the differences between a public query and a private query. The following items are a list of the most important differences:

- A public query may be used by anyone who has the proper security.
- Only the individual who created it may use a private query.
- If you use a public query created by someone else—and make any modifications to it—you must save it as a private query before making any changes.
- **Always** save your version of a public query with a unique name. We recommend using TU_(the creator's initials) as the first set letters of the query name. This will helpful during upgrades and testing.

Some queries contain multiple joins and various tables, and can take a while to run, especially if the criteria range is large. In these situations, it is best to use Query Scheduler as these processes are run on a main server as compared to your desktop. This will also give the user the ability to continue working within PeopleSoft instead of waiting as the process is running on their desktop.

Frequently Asked Questions:

How are the queries secured? Towson utilizes the security in place for nVision distribution table in conjunction with the Commitment Control security. When the end user has access to a specific department defined in their Report Book, they will have the ability to query on that department as well. The nVision security also contains a number of node level reports. If the user has the node level report in their Report Book, they will have query access to all of the departments under that node; there is not a need to have each department listed in the nVision Report Book. The list of queries provided under the folder "ALL" are not secured. These queries provide chart of accounts information, and contain no specific financial transactions, or payroll information.

I see that I can run a query by Source Code, is there a list of all Source Codes? Yes, for an up to date list of the various Source Codes utilized, please go to:
http://www.towson.edu/adminfinance/fiscalplanning/financialservices/documents/JOURNALSOURCESforReporting.pdf
The document also includes the contact person for the area submitting the expenses.

How can the queries be run? Users can run the predefined queries in either HTML, or Excel. There is also an option of downloading the HTML output to Excel.

What should a user do if the wrong criterion is entered in a prompt field and they have already clicked view results? If an error in the data entered for prompts is discovered, it is asked that the query be allowed to run before making the change and re-running.

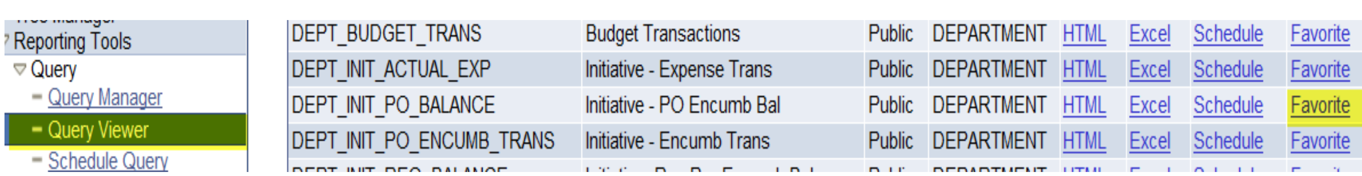
How are the predefined queries grouped together? The predefined queries are grouped by, "DEPARTMENT", "PROJECT", and "ALL". Department queries also include queries on initiatives.

I ran a query and receive a message that says "No Matching Values Found". What does this mean? This message could have two meanings. This message could mean that the criteria entered does not match your security, you do not have access to that department, grant, or fund. It could also mean that there simply is no data for the criteria entered. Examples are: the department doesn't have expenses to date for that particular fiscal year, or there were no Pro-Card charges for that month.

How can I tell if the error message is given because I don't have access to that chartfield?
There are queries that can be run by chartfield to show User Access. These queries are under the folder "ALL". (See chart "List of Queries with Descriptions)

What should I do if I find that I do not have access to something that I should? If a user does not have access to a specific department or grant but they should, a message needs to be sent to the PSTEAM@towson.edu, requesting nVision access to that department or grant. Please be sure to have the email sent from the manager of that area.

I have queries that I run regularly, do I have to search for them each time? No. If a user has a query, or multiple queries that are run on a regular basis, they can add them to their favorites list. Each time the user navigates to Query Manager, or Query Viewer, the queries marked as "Favorites" appear, and can be run without searching. To mark a query as a "Favorite"; navigate to Query Viewer, and then select the Favorite option next to the appropriate query.



I have queries that I run regularly using the same criteria. Can I save my criteria to avoid re-entering?

Yes. Users can save specific criteria frequently used by navigating to Reporting Tools/Query and then choosing the Schedule Query option. For detailed instructions see steps on Scheduling a Query.

If I schedule a query to avoid reentering, am I required to set up a recurrence?

No. The Schedule Query option can be used to simply save criteria, and run at the users' discretion.

The query that I am running keeps timing me out, what should I do?

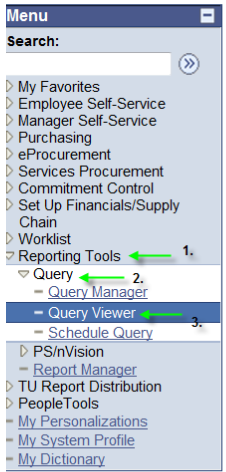
Some queries contain multiple joins and various tables, and can take a while to run, especially if the criteria range is large. In these situations, it is best to use Query Scheduler as these processes are run on a main server as compared to your desktop.

How can I go about requesting a modification to a query, or the addition of a new query?

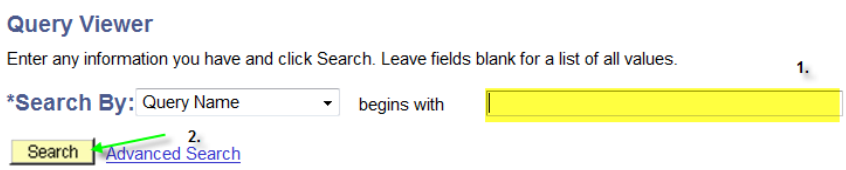
Any request for a new query, or a modification to an existing query need to be made through the User Advisory Committee. The committee will review the request and determine if it should be sent on to the appropriate PeopleSoft Financials' team members.

How to Run Queries:

1. From the menu bar, select Reporting Tools, then Query, then Query Viewer.



2. Enter the Query Name to be run in the “begins with” box (1), then select “Search” (2). Users can enter the first few letters of a query name and then search to return a list of all queries that can be run based on security. If no data is entered, the first 300 queries will be returned, however users do not have security for these queries. In the example below, DEPT was entered in the “begins with” box. (A list of available queries is in chart form below.)

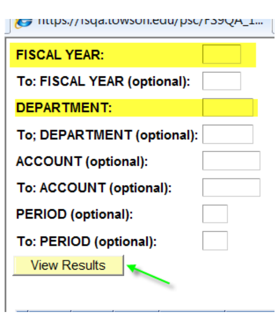


3. Choose the option of how the query is to be run; either HTML or Excel. If the query is run into HTML, it can be downloaded into Excel.

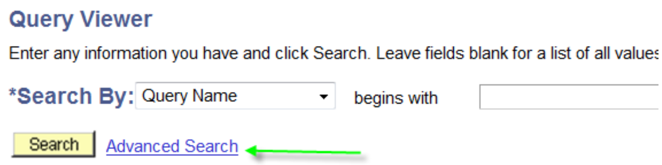
Query — Customize | Find | View All | First 1-15 of 15 Last

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
DEPT_ACTUAL_REV_EXP	Revenue and Expense Trans	Public	DEPARTMENT	HTML	Excel	Schedule	Favorite
DEPT_BUDGET_BALANCE	Budget Remaining Balance	Public	DEPARTMENT	HTML	Excel	Schedule	Favorite
DEPT_BUDGET_TRANS	Budget Transactions	Public	DEPARTMENT	HTML	Excel	Schedule	Favorite
DEPT_PAY_ACCT_EMPL	Payroll by Account and Empl	Public	DEPARTMENT	HTML	Excel	Schedule	Favorite
DEPT_PAY_DET_TRANS	Payroll Detail Transactions	Public	DEPARTMENT	HTML	Excel	Schedule	Favorite
DEPT_PAY_EMPL_DATE	Payroll by Employee and Date	Public	DEPARTMENT	HTML	Excel	Schedule	Favorite
DEPT_PAY_EMPL_MONTH_SUM	Payroll by Employee and Month	Public	DEPARTMENT	HTML	Excel	Schedule	Favorite
DEPT_PO_BALANCE	PO Encumb Balances	Public	DEPARTMENT	HTML	Excel	Schedule	Favorite

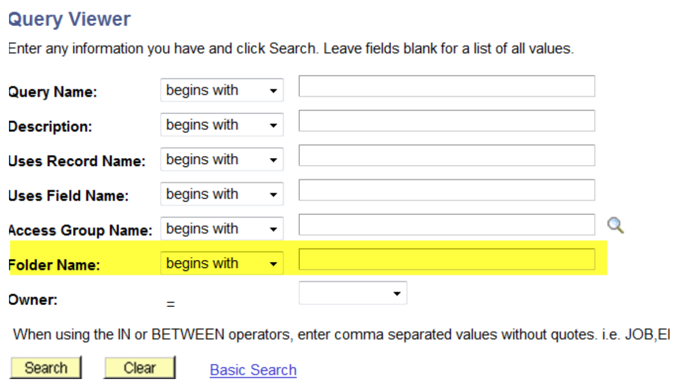
4. Based on the query selected, user must enter required information (highlighted below) and then select “View Results”.



5. The user may also select the “Advanced Search” link to search for a query (instead of the query name on Step 2).



6. Search for query by any of the options listed. Example highlights “Folder Name”. Current folders available include DEPARTMENT, PROJECT and ALL.



For this example, PROJECT was entered.

Query — Customize | Find | View All | First 1-14 of 14 Last

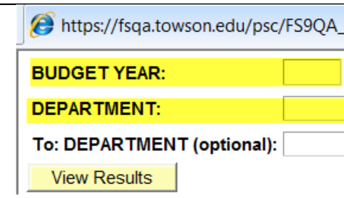
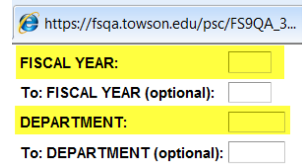
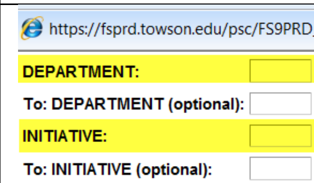
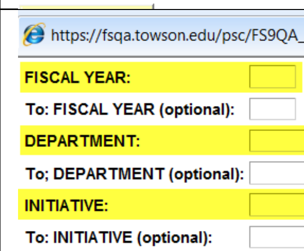
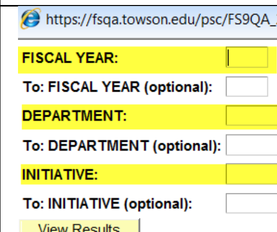
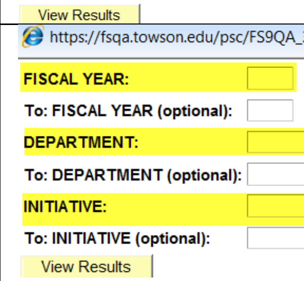
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
PROJ_ACTUAL_REV_EXP	Revenue and Expense Trans	Public	PROJECT	HTML	Excel	Schedule	Favorite
PROJ_BUDGET_BALANCE	Budget Remaining Balance	Public	PROJECT	HTML	Excel	Schedule	Favorite
PROJ_BUDGET_TRANS	Budget Transactions	Public	PROJECT	HTML	Excel	Schedule	Favorite
PROJ_PAY_ACCT_EMPL	Payroll by Account and Empl	Public	PROJECT	HTML	Excel	Schedule	Favorite
PROJ_PAY_DET_TRANS	Payroll detail transactions	Public	PROJECT	HTML	Excel	Schedule	Favorite
PROJ_PAY_EMPL_DATE	Payroll by Employee and Date	Public	PROJECT	HTML	Excel	Schedule	Favorite
PROJ_PAY_EMPL_MONTH_SUM	Payroll by Employee and Month	Public	PROJECT	HTML	Excel	Schedule	Favorite
PROJ_PO_BALANCE	PO Encumb Balances	Public	PROJECT	HTML	Excel	Schedule	Favorite
PROJ_PO_ENCUMB_TRANS	Encumb transactions	Public	PROJECT	HTML	Excel	Schedule	Favorite
PROJ_PO_VOUCHERS	Single PO transactions	Public	PROJECT	HTML	Excel	Schedule	Favorite
PROJ_REQ_BALANCE	Req Pre-Encumb Balances	Public	PROJECT	HTML	Excel	Schedule	Favorite
PROJ_REQ_PRE_TRANS	Pre-Encumb Tranctions	Public	PROJECT	HTML	Excel	Schedule	Favorite
PROJ_SF_DETAIL	Student Financials Detail	Public	PROJECT	HTML	Excel	Schedule	Favorite
PROJ_VENDOR_ENCUMB	Single Vendor PO Trans	Public	PROJECT	HTML	Excel	Schedule	Favorite

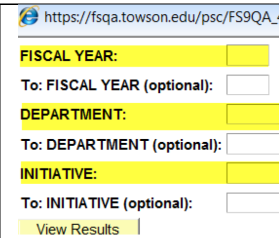
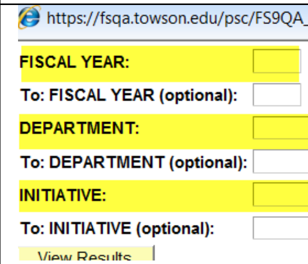
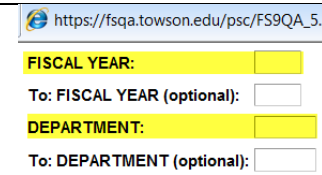
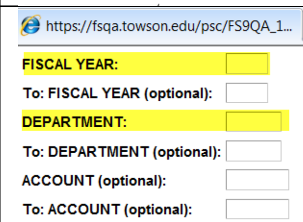
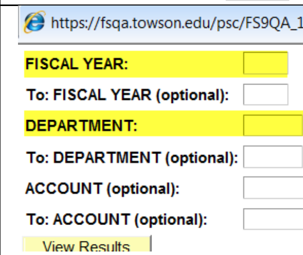
7. Based on the query selected, user must enter required information and then select “View Results”.

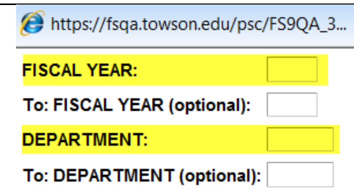
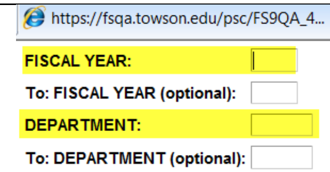
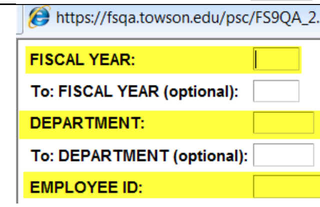
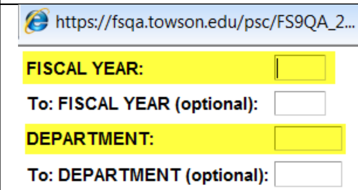
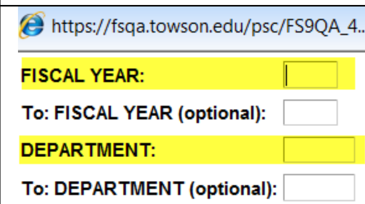
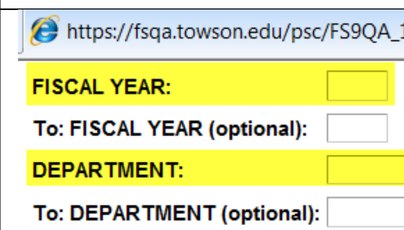
List of Queries with Descriptions:

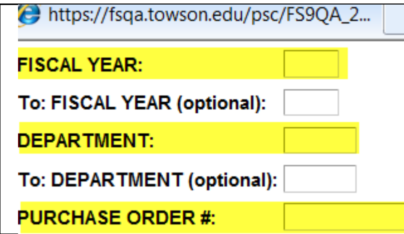
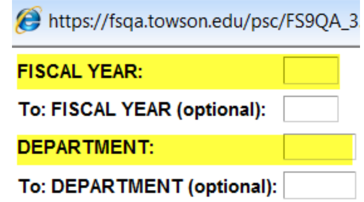
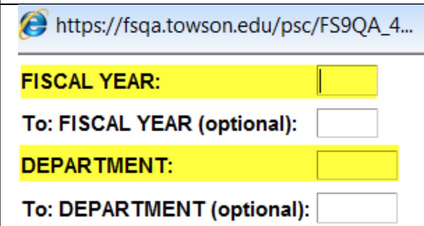
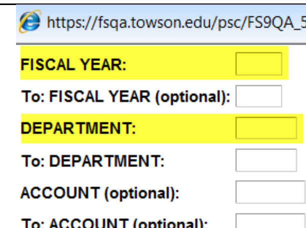
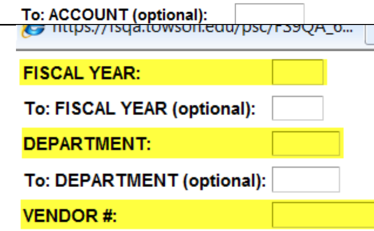
Query Table

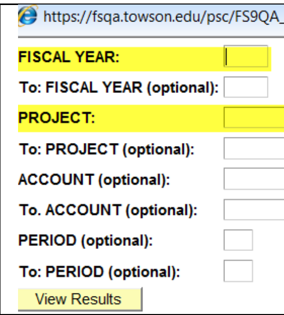
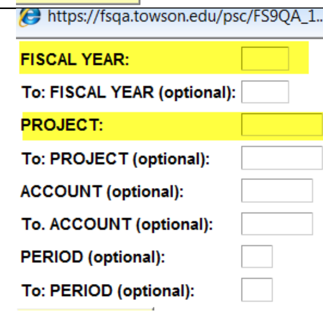
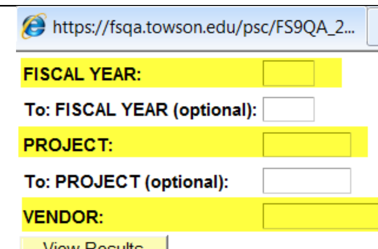
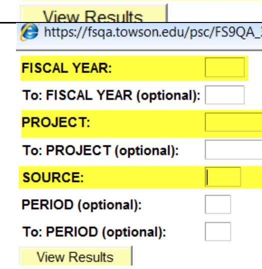
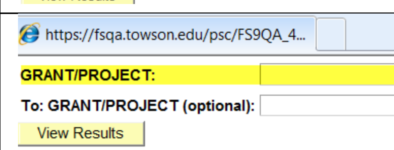
Query Name	Descr	Folder	Detailed Description	Query Prompts Highlighted prompts are required fields. Additional fields are optional.
DEPT_ACTUAL_REV_EXP	Revenue and Expense Trans	DEPARTMENT	This query can be run to find all, or specific account transactions by department, or department range. Can be run for a single fiscal year, or multiple years; as well as specified periods.	https://fsqa.towson.edu/psc/FS9QA_1... FISCAL YEAR: To: FISCAL YEAR (optional): DEPARTMENT: To; DEPARTMENT (optional): ACCOUNT (optional): To: ACCOUNT (optional): PERIOD (optional): To: PERIOD (optional): View Results
DEPT_ACTUAL_SINGLE_VENDOR	Vendor Invoice Transactions	DEPARTMENT	This query can be run to show all invoice payments made to a specific vendor by department, or range of departments, for one fiscal year, or a range of fiscal years. Must have vendor number (can be found on DAT and DEN reports, as well as the PO).	https://fsqa.towson.edu/psc/FS9QA_2... FISCAL YEAR: To: FISCAL YEAR (optional): DEPARTMENT: To; DEPARTMENT (optional): VENDOR: View Results
DEPT_ACTUAL_SOURCE_REV_EXP	Source-Rev and Exp Trans	DEPARTMENT	This query can be run to show all transactions by a specific Source Code for a single department or range of departments, by one fiscal year, or a range of fiscal years; as well as by period, or range of periods. Must have specific source code to obtain results.	https://fsqa.towson.edu/psc/FS9QA_4 FISCAL YEAR: To: FISCAL YEAR (optional): DEPARTMENT: To; DEPARTMENT (optional): SOURCE: PERIOD (optional): To: PERIOD (optional): View Results
DEPT_BUDGET_BALANCE_PARENT	Budget Remaining Balance	DEPARTMENT	This query can be run to find the budget balance available at the parent level for a single department, or a range of departments for a specific fiscal year.	https://fsqa.towson.edu/psc/FS9QA_4... BUDGET YEAR: DEPARTMENT: To: DEPARTMENT (optional):

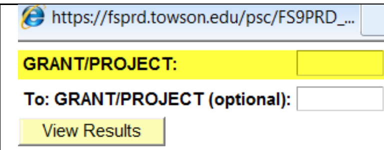
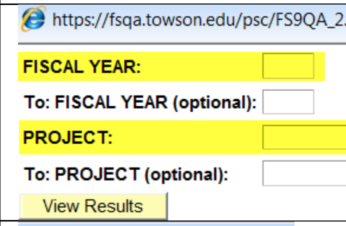
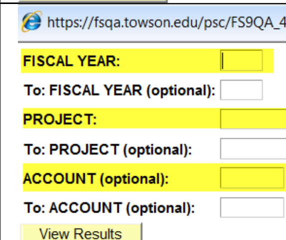
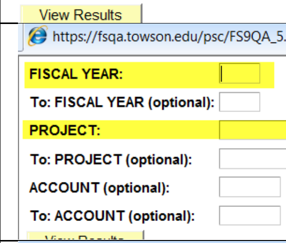
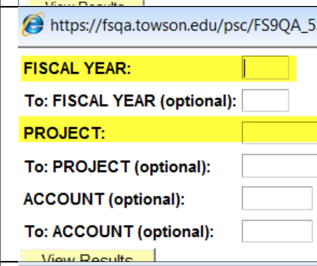
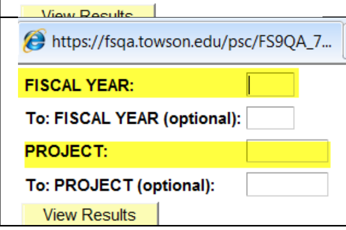
DEPT_BUDGET_BALANCE_CHILD	Child Budget Net Amounts	DEPARTMENT	This query can be run to find the net budget balance available at the child level for a department or range of departments. Includes net amounts for budget, actuals, encumbrances, and pre-encumbrances.	
DEPT_BUDGET_TRANS	Budget Transactions	DEPARTMENT	This query can be run to find all budget transactions for a single department, or department range, for a particular fiscal year, or a range of fiscal years.	
DEPT_INIT_BUDGET_BALANCE	Initiative – Budget Rem Bal	DEPARTMENT	This query can be run to find the remaining budget balance by child account for a department initiative.	
DEPT_INIT_ACTUAL_EXP	Initiative – Expense Transactions	DEPARTMENT	This query can be run to show the actuals for an initiative by department, or range of departments, and for one fiscal year or a range of fiscal years.	
DEPT_INIT_PO_BALANCE	Initiative-PO Encumb Balance	DEPARTMENT	This query can be run to show Purchase Order balances related to an initiative by a single department or range of departments, by fiscal year or range of fiscal years. Query will show a total of amount of vouchers/journals.	
DEPT_INIT_PO_ENCUMB_TRANS	Initiative – PO Encumb Trans	DEPARTMENT	This query can be run to show all encumbrance transactions related to a Purchase Order that uses an Initiative, for a department, or range of departments, by fiscal year or range of fiscal years. Query will show each voucher/journal that changed the encumbrance amount.	

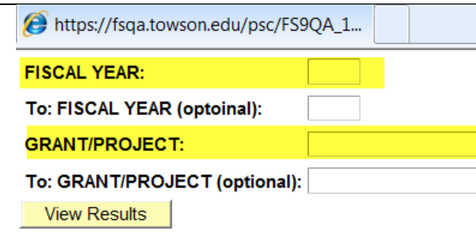
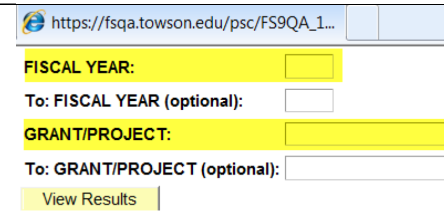
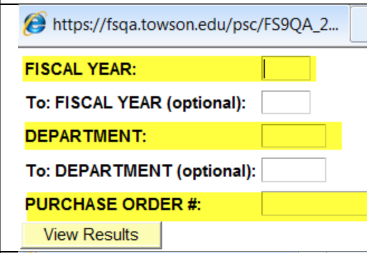
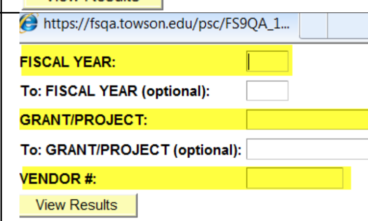
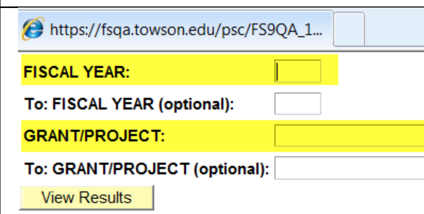
DEPT_INIT_REQ_BALANCE	Initiative-Req Pre-Encumb Bal	DEPARTMENT	This query can be run to show all pre-encumbrance balances related to an initiative by a single department, or range of departments, and by fiscal year or range of fiscal years. If a PO or journal liquidated any amount of the REQ, a total amount will be shown.	
DEPT_INIT_REQ_PRE_TRANS	Initiative-Pre-Encumb Trans	DEPARTMENT	This query can be run to show all pre-encumbrance transactions related to a requisition that uses an initiative, for a single department, or range of departments, by fiscal year or range of fiscal years. Query will show the PO number (if applicable) that liquidated the requisition(s).	
DEPT_PAY_ACCT_EMPL	Payroll by Account and Empl	DEPARTMENT	This query can be run to find the <u>summarized</u> pay by account, by employee, for a department, or a range of departments.	
DEPT_PAY_DET_TRANS	Payroll Detail Transactions	DEPARTMENT	This query can be run to find the <u>detailed</u> pay by account, by employee, for a department, or a range of departments.	
DEPT_PAY_EMPL__ACCT_MONTH_SUM	Payroll by Empl, Acct & Month	DEPARTMENT	This query can be run to summarize by ACCOUNT an employee's pay by month for a department and fiscal year, or years. Can also be run for multiple departments. User can specify an account or leave blank for all payroll accounts.	

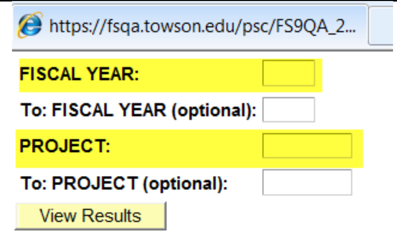
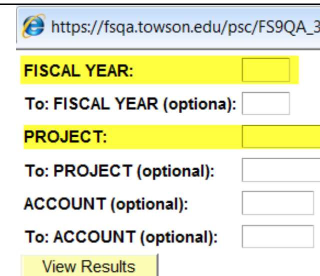
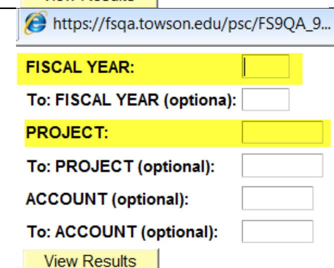
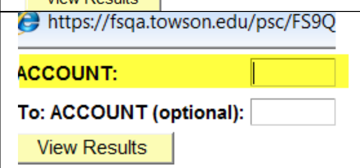
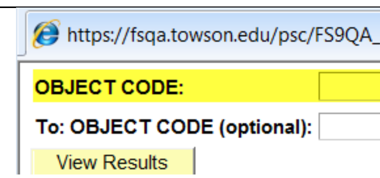
DEPT_PAY_EMPL_DATE	Payroll by Employee and Date	DEPARTMENT	This query can be run to find the total amount paid to an employee by department, or department range, by pay period.	
DEPT_PAY_EMPL_MONTH_SUM	Payroll by Employee and Month	DEPARTMENT	This query can be run to summarize employee pay by month for a department(s) and fiscal year or years.	
DEPT_PAY_SINGLE_EMPLOYEE	Payroll sum for employee	DEPARTMENT	This query can be run to find total paid to an employee by pay period for a single department, or range of departments, by one fiscal year, or a range of fiscal years. To use this query you must have the Employee ID.	
DEPT_PO_BALANCE	PO Encumb Balances	DEPARTMENT	This query can be run to show the purchase order summarized balances for a single department, or a range of departments. Query provides PO number, vendor name, PO amount, the sum of vouchers paid and remaining encumbrance. (If multiple lines exist for a department on a single PO, only one line will show the summary.)	
DEPT_PO_ENCUMB_TRANS	Encumb Transactions	DEPARTMENT	This query can be run to show the purchase order details for a single department, or a range of departments. Query shows encumbrances and individual vouchers paid, but does NOT show the balance remaining on PO.	
DEPT_PO_LINE_BALANCE	PO Line Remaining Balances	DEPARTMENT	This query can be run to show the PO detailed balances for a department, or range of departments. Query also shows summary of vouchers paid. (If multiple lines exist for a department on a single PO, results will appear for EACH line and include the remaining balances.)	

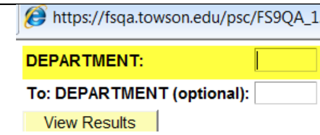
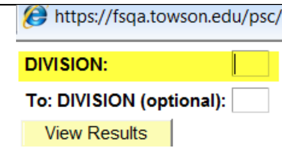
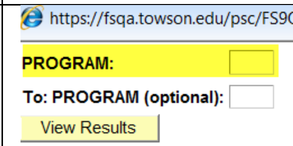
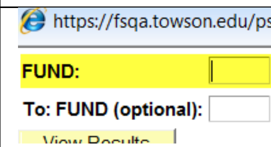
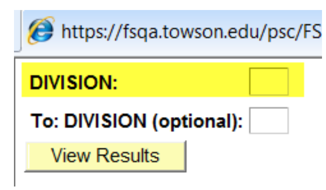
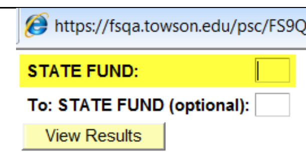
DEPT_PO_SINGLE_PO	Single PO Transactions	DEPARTMENT	This query can be run to show vouchers paid against a specified purchase order for a department, or for multiple departments. Query provides voucher number. NOTE: must have PO number.	
DEPT_REQ_BALANCE	Req Pre-Encumb Balances	DEPARTMENT	This query can be run to show requisitions created by department, or range of departments, for a particular fiscal year, or multiple fiscal years. The query will show if there is still an open pre-encumbrance, or if the amount has already been liquidated (through a purchase order).	
DEPT_REQ_PRE_TRANS	Pre-Encumb Transactions	DEPARTMENT	This query can be run to show ALL pre-encumbrance transactions for a department, or range of departments. The query will show the pre-encumbrance and the liquidation - if the purchase order was created. The PO number will also be displayed.	
DEPT_SF_DETAIL	Student Financials Detail	DEPARTMENT	This query can be run to show detailed transactions related to Student Financials, by department, or range of departments, as well as one fiscal year or a range of fiscal years.	
DEPT_PO_SINGLE_VENDOR	Single Vendor PO Trans	DEPARTMENT	This query can be run to find ALL transactions related to a specific vendor by department, or a range of departments; for a fiscal year, or range of fiscal years. NOTE: must have vendor number.	

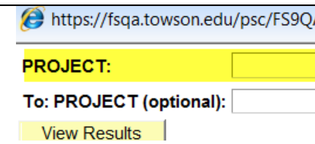
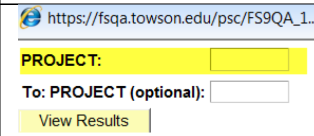
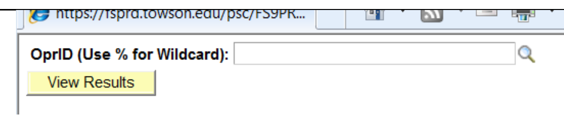
PROJ_ACTUAL_BAL_SHEET	Balance Sheet Transactions	PROJECT	This query can be run to find all balance sheet transactions for a specific grant or range of grants by fiscal year or range of fiscal years. A specific account or account range, as well as a specific period or range of periods can be used.	
PROJ_ACTUAL_REV_EXP	Revenue and Expense Trans	PROJECT	This query can be run to find all, or specific, transactions by project, or project range. Can be run for a single fiscal year, or multiple years; as well as specified periods.	
PROJ_ACTUAL_SINGLE_VENDOR	Vendor invoice transactions	PROJECT	This query can be run to find ALL transactions related to a specific vendor by project, or a range of projects, by a fiscal year, or range of fiscal years. NOTE: must have vendor number.	
PROJ_ACTUAL_SOURCE_REV_EXP	Source-Rev and Exp Trans	PROJECT	This query can be run to show all transactions by a specific Source Code for a single project or range of projects, by one fiscal year, or a range of fiscal years; as well as by period, or range of periods. Must have specific source code to obtain results.	
PROJ_BUDGET_BALANCE_PARENT	Budget Remaining Balance	PROJECT	This query can be run to find the budget balance available at the parent level for a single project, or a range of projects.	

PROJ_BUDGET_BALANCE_CHILD	Child budget net amounts	PROJECT	This query can be run to find the budget balance available at the child level for a single project, or a range of projects.	
PROJ_BUDGET_TRANS	Budget Transactions	PROJECT	This query can be run to find all budget transactions for a single project, or a range of projects, for a particular fiscal year or a range of fiscal years.	
PROJ_PAY_ACCT_EMPL	Payroll by Account and Empl	PROJECT	This query can be run to find the summarized pay by account or range of accounts, by employee, for a project, or a range of projects.	
PROJ_PAY_DET_TRANS	Payroll Detail Transactions	PROJECT	This query can be run to find the detailed pay by account, by employee, for a project, or a range of projects.	
PROJ_PAY_EMPL_ACCT_MTH_SUM	Payroll by Empl, Accnt & Month	PROJECT	This query can be run to summarize by ACCOUNT an employee's pay by month for a department and fiscal year, or years. Can also be run for multiple departments. User can specify an account or leave blank for all payroll accounts.	
PROJ_PAY_EMPL_MONTH_SUM	Payroll by Employee and Month	PROJECT	This query can be run to summarize an employee's pay by month for a project or a range of projects, and a fiscal year, or range of fiscal years.	

PROJ_PAY_SINGLE_EMPLOYEE	Payroll sum for employee	PROJECT	This query can be run to find the total paid to an employee by pay period for a single project, or range of projects in one fiscal year, or a range of fiscal years. To use this query you must have the Employee ID.	
PROJ_PO_BALANCE	PO Encumb Balances	PROJECT	This query can be run to show the purchase order summarized balances for a single project, or a range of projects. Query provides PO number, vendor name, PO amount, sum of vouchers paid, and remaining encumbrance. (If multiple lines exist for a project on a single PO, only one line will show the summary)	
PROJ_PO_ENCUMB_TRANS	Encumb transactions	PROJECT	This query can be run to show the purchase order details for a single project, or a range of projects. Query shows encumbrances and individual vouchers paid, but does NOT show the balance remaining on the PO.	
PROJ_PO_SINGLE_PO	Single PO transactions	PROJECT	This query can be run to show vouchers paid against a specified purchase order for a project, or for multiple projects. The query provides a voucher number. NOTE: must have the PO number.	
PROJ_PO_SINGLE_VENDOR	Single Vendor PO Trans	PROJECT	This query can be run to find ALL transactions related to a specific vendor by project or a range of projects; for a fiscal year, or range of fiscal years. NOTE: must have vendor number.	

PROJ_REQ_BALANCE	Req Pre-Encumb Balances	PROJECT	This query can be run to show requisitions created by project, or range of projects, for a particular fiscal year, or multiple fiscal years. The query will show if there is still an open pre-encumbrance, or if the amount has already been liquidated (through a purchase order).	
PROJ_REQ_PRE_TRANS	Pre-Encumb Transactions	PROJECT	This query can be run to show ALL pre-encumbrance transactions for a project, or range of projects. The query will show the pre-encumbrance and the liquidation - if the purchase order was created. PO number will also be displayed.	
PROJ_SF_DETAIL	Student Financials Detail	PROJECT	This query can be run to show detailed transactions related to Student Financials. This can be run for one project or range of projects, one fiscal year, or a range of fiscal years. Users may also specify an account, or account range.	
ALL_ACCOUNT_DESCR	Account Descriptions	ALL	This query can be run to find a single account description or a list of account descriptions in a range. Query will also show the state object code.	
ALL_ACCOUNT_OBJECT	Accounts using object code	ALL	This query can be run to find an object description, as well as the PeopleSoft accounts associated with that object and their descriptions. Queries can be run for one object code, or a range of object codes.	

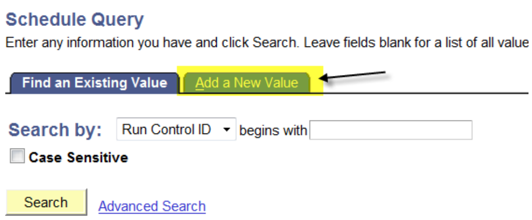
ALL_DEPARTMENT_DESCR	Department Descriptions	ALL	This query can be run to find the department description, program, sub program, division, sub division and budget contact person. Query can be run for one department, or a range of departments.	
ALL_DEPARTMENT_DIVISION	Divisions using division code	ALL	This query can be run to find all departments in a specific division, or range of divisions. Query results show division, department, status, program, sub program, and budget contact. Example: Division 05 – Admin & Finance	
ALL_DEPARTMENT_PROGRAM	Department using program	ALL	This query can be run to find all departments in a specific program, or range of programs. Query results also show sub program, division, sub division, and budget contact. Example: Program 004 – Academic Support	
ALL_FUND_DECSR	Fund Descriptions	ALL	This query can be run to find the description of a PeopleSoft fund. Query results show the division, sub division, and associated STATE fund. Example: Fund 4120 – Sports Complex Operation	
ALL_FUND_DIVISION	Funds using division code	ALL	This query can be run to find all departments in a single division or a range of divisions. Query shows sub division, department, status, program, sub program, and budget contact. Example: 04 – Student Affairs	
ALL_FUND_STATE	Funds using State Fund code	ALL	This query can be run to find all PeopleSoft funds in a single State Fund or range of State Funds. Query shows PeopleSoft fund, status, division, and sub division. Example: 43-Current Restricted	
ALL_MY_DEPARTMENTS	User's Departments for Queries	ALL	This query can be run to see all departments that are assigned to a user. The query shows department description	No prompt needed. Data returned reflects security by USERID that is logged in.

			as well. (DPL, NPL)	
ALL_MY_FUNDS	User's Funds for Query	ALL	This query can be run to see all funds that are assigned to a user. (F Reports)	No prompt needed. Data returned reflects security by USERID that is logged in.
ALL_MY_PAY_DEPARTMENTS	User's Payroll Departments	ALL	This query can be run to see all payroll reports that are assigned to a user. (DPR or NPR reports)	No prompt needed. Data returned reflects security by USERID that is logged in.
ALL_MY_PROJECTS	User's Projects for Query	ALL	This query can be run to see all project reports that are assigned to a user. (P reports)	No prompt needed. Data returned reflects security by USERID that is logged in.
ALL_PROJECT_DESCR	Project Description	ALL	This query can be run to find project descriptions and <u>all</u> attributes including but not limited to: start/end date, type, CFDA #, division, sub division, source etc.	
ALL_PROJECT_INACTIVE	Inactive Projects	ALL	This query can be run to determine if a project is INACTIVE. The query will show start and end dates, as well as the date that the project became inactive. If the project is NOT inactive, no results will be displayed.	
ALL_QUERY_LIST	List of Secured Queries	ALL	This query can be run to see a list of all secured queries available.	No prompt needed.
ALL_REPORTS_FOR_USER	nVision reports for user	ALL	This query can be run to see a list of all reports available to a user by USERID.	

Scheduling a Query:

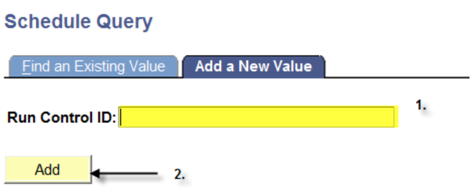
Many times users run the same query and use the same criteria. In order to avoid reentering the criteria each time, users can use the "Schedule Query" function to save their criteria. It is NOT necessary to set the query to run on a recurring basis. In order to save the criteria for a query by scheduling, navigate to "Schedule Query" using the path: "Reporting Tools/Query/Schedule Query". **NOTE: You must use the name of the query you are going to schedule**

Then select the "Add a New Value" tab.

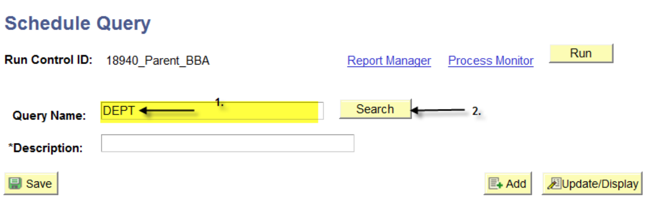


Enter a name for the query that you are scheduling in the "Run Control ID" box. Then click "Add". Run Control ID's CANNOT contain spaces, however, you can use an underscore to separate words/numbers. It is advised to use a Run Control ID that will allow you to easily identify the query and criteria you are running.

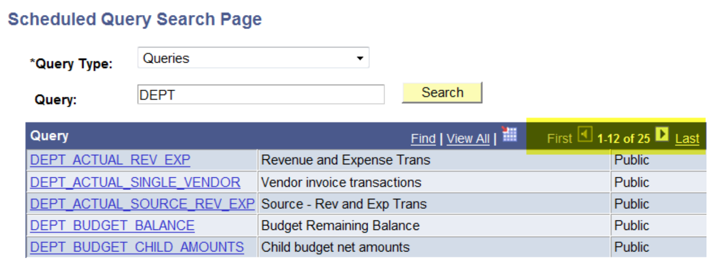
For example: "18940_Parent_BBA"



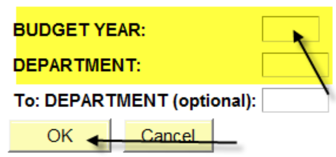
Enter the entire query name or the beginning of the query name and select Search.



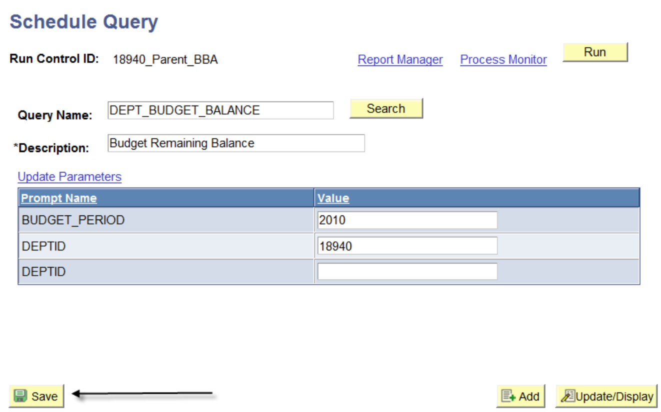
From the list displayed, select the query you are going to schedule. Note that not all of the queries may be displayed at once and you will need to "View All".



Once the query has been selected, the screen will reflect the criteria needed. In this case “BUDGET YEAR” and “DEPARTMENT” values are needed. Note that the “To: DEPARTMENT” is optional. Once the criteria has been entered, select “OK”.



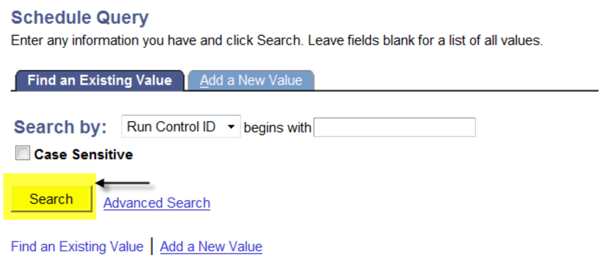
Your query has not been established, you must “Save” the scheduled query now.



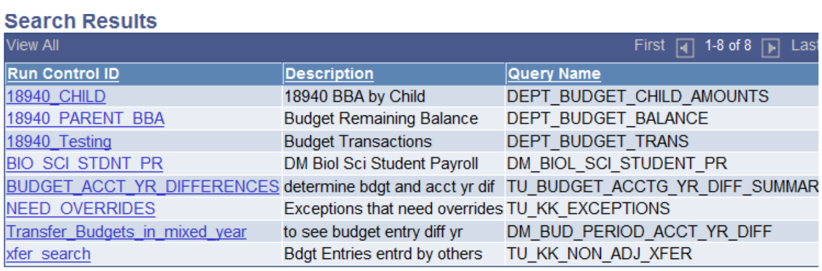
Running a Scheduled Query:

Once a "Scheduled Query" has been saved, the user can now run that query. To run a scheduled query, navigate to "Reporting Tools/Query/Schedule Query".

Select "Search" while on the "Find an Existing Value" tab.



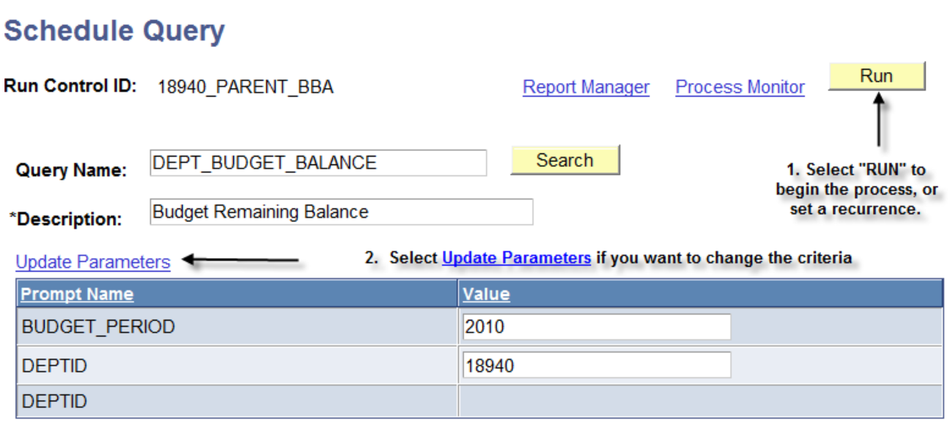
This will return a list of the queries you have scheduled. Select the "Run Control ID" associated with the query you want to view.


Search Results

View All | First 1-8 of 8 Las

Run Control ID	Description	Query Name
18940_CHILD	18940 BBA by Child	DEPT_BUDGET_CHILD_AMOUNTS
18940_PARENT_BBA	Budget Remaining Balance	DEPT_BUDGET_BALANCE
18940_Testing	Budget Transactions	DEPT_BUDGET_TRANS
BIO_SCI_STDNT_PR	DM Biol Sci Student Payroll	DM_BIOL_SCI_STUDENT_PR
BUDGET_ACCT_YR_DIFFERENCES	determine bdgt and acct yr dif	TU_BUDGET_ACCTG_YR_DIFF_SUMMAR
NEED_OVERRIDES	Exceptions that need overrides	TU_KK_EXCEPTIONS
Transfer_Budgets_in_mixed_year	to see budget entry diff yr	DM_BUD_PERIOD_ACCT_YR_DIFF
xfer_search	Bdgt Entries entrd by others	TU_KK_NON_ADJ_XFER

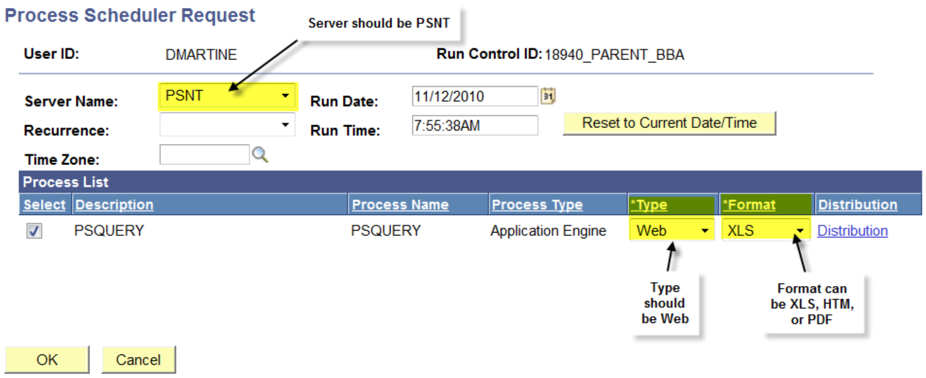
Once the Run Control ID has been selected, the Scheduled Query will be displayed. From this page, users have 2 options. They can either run/schedule the query or "Update Parameters",(criteria).



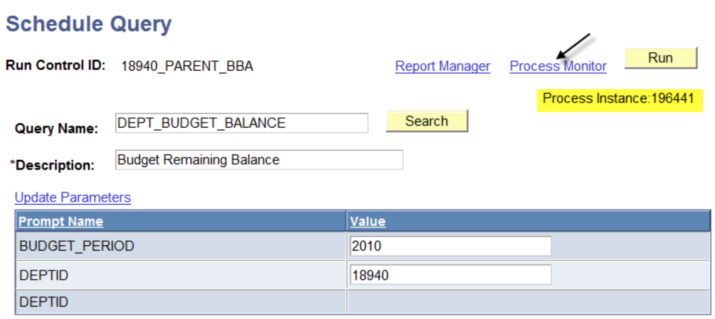
Once you select Run you will need to identify the "Server Name" as well as "Type" and "Format", just as required for nVision reporting.

The "Server Name" should be set to "PSNT".

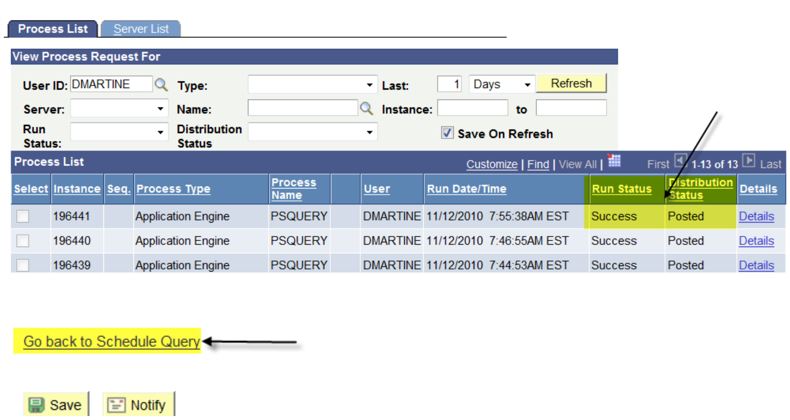
The "Type" should be "Web", and the "Format" can either be "**HTM**", "**XLS**" or "**PDF**". Once options have been established, select "OK" at the bottom of the screen.



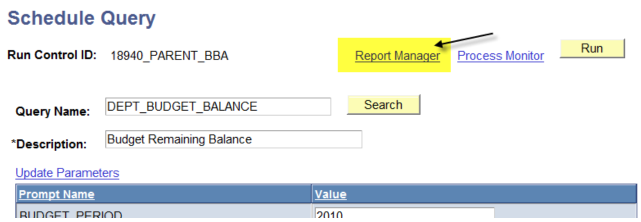
You will be returned to the Schedule Query page, and should see a Process Instance number under "RUN". This means you have successfully run your scheduled query. To review the status, select "Process Monitor".



Once on the Process List tab, review the Run Status and Distribution Status. Refresh the page, until the status shows "Success" and "Posted". Then click on Go back to Schedule Query.



Select Report Manager.



Click on the description of the query you ran to open.