

North Dakota University System

ConnectND Finance 9.0

Query Download and Query Scheduler job aid

Version 1.2

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Table of Contents

QUERY DOWNLOAD	5
Step 1. Access query	5
Steps 1a and 1b. Run Control.....	5
Step 2. Query Download Page	6
Step 3. SAVE/Open File	6
Re-Run Query – Same Results.....	7
Same Query with different parameters.....	7
QUERY SCHEDULE	8
Step 1. Access query	8
Step 1a and 1b. Run Control	8
Step 2. Query Schedule Page	9
Step 3. Process Scheduler Page	9
Step 4. Access the Query Results	9
Re-Run Query –	11

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QUERY DOWNLOAD

This custom feature in PeopleSoft allows files to be created and copied to the user's PC. There are no size limits as with using the Excel or HTML formats and thus the Query Download provides a method to return large volumes of data for the user. This method eliminates proxy errors for those large queries also.

Step 1. Access query: Navigation: Reporting Tools> Query> Query Viewer, enter query or search for a query. On your selected query, click the [Query Download](#) Link.

Query Viewer **1**

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

*Search By: Query Name **2** begins with NDU_PO09

Search **3** Advanced Search

Search Results

*Folder View: -- All Folders --

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites	Query Download
NDU_PO09_PO_DTL_BY_BU_CF	PO Dtl by Bus Unit & Chart Fld	Public		HTML	Excel	Schedule	Favorite	Query Download 4

Steps 1a and 1b. Run Control

A new run control page will appear: set up a run control **once** for **each query** you may want to have for download capabilities. It is suggested to name your Run Control similar to your selected query.

<p>Step 1a: On the Add a New Value Tab, enter in your Run Control ID</p> <p>Click ADD</p>	<p>Step 1b: Complete the fields as desired.</p> <p>Click OK</p>
<p>Query Download</p> <p>Find an Existing Value Add a New Value 1</p> <p>Run Control ID: NDU_PO09 2</p> <p>Add 3</p>	<p>NDU_PO09_PO_DTL_BY_BU_CF</p> <p>Business Unit: und01</p> <p>Entered Date From: 1-1-08</p> <p>Entered Date Through: 12-15-08</p> <p>Dept Like: %</p> <p>Fund Like: %</p> <p>Project Like: %</p> <p>OK Cancel</p>

Step 2. Query Download Page

Query Download

Query Download File

Run Control ID: QUERY_DOWNLOAD [Report Manager](#) [Process Monitor](#) [Run Batch](#) 1

Query Name: [Refresh](#) [Run Online](#) [SAVE](#) [RESET](#)

*Description:

[Update Report Parameters](#)

Query Bind Name	Prompt Value
BUSINESS_UNIT	<input type="text" value="UND01"/>
ENTERED_DT	<input type="text" value="2008-01-01"/>
ENTERED_DT	<input type="text" value="2008-12-15"/>
DEPTID	<input type="text" value="%"/>
FUND_CODE	<input type="text" value="%"/>
PROJECT_ID	<input type="text" value="%"/>

[OK](#) [Cancel](#) [Apply](#)

1. Click "Run Batch"
On the Process Scheduler Request Page, Click "OK"
The Query Download page will return with an assigned process instance number.

2. Click the Process Monitor link
When the process status is success and posted,
use the "Go back go Query Download" link

Go to Step 3

Step 3. SAVE/Open File

Query Download

Query Download File

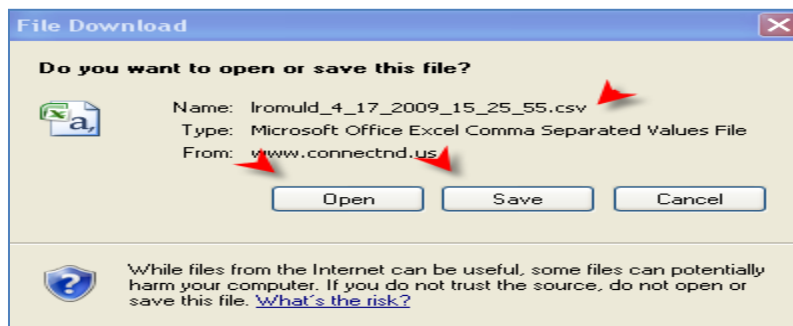
Run Control ID: NDU_PO09 [Report Manager](#) [Process Monitor](#) [Run Batch](#)

Query Name: [Refresh](#) 1 [Search](#) [Run Online](#) [SAVE](#) 2 [RESET](#)

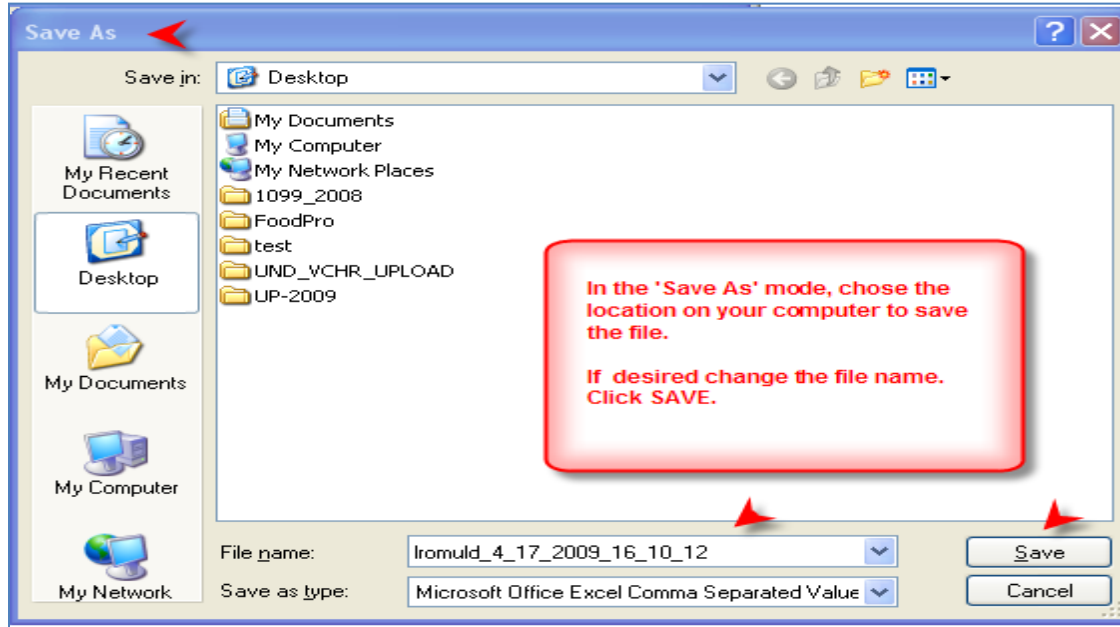
1. Click 'Refresh' to make the SAVE button available.

2. Click on SAVE ~ A dialog box will appear.

A dialog box appears which shows the system assigned csv file and the options of 'open' or 'save'. If the file is more than the Excel 2003 maximum rows (65,536) then do a save; if you have Excel 2007 you should be able to open the file if you choose not to save it.

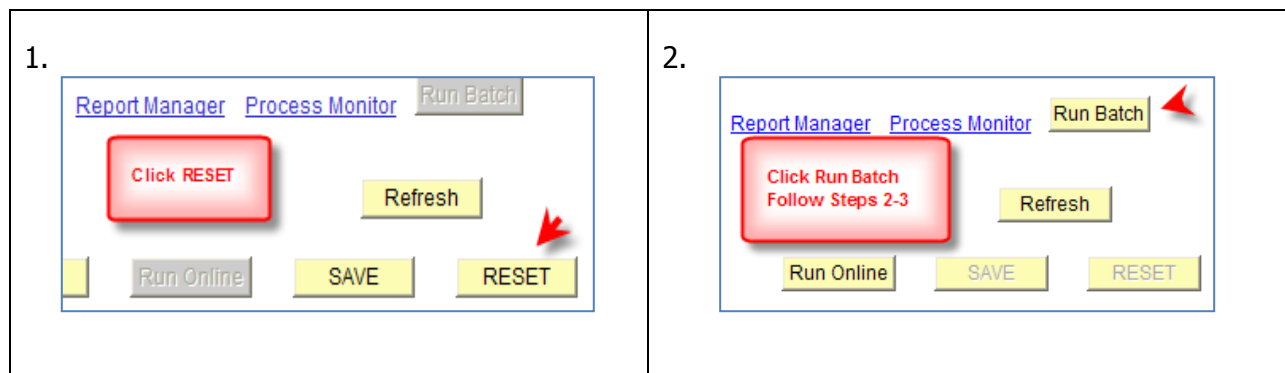


The SAVE AS page appears: To review your file, open it in Excel.



Re-Run Query – Same Results

To use the Query Download for the same query results, open the query using Query Viewer click on the [Query Download](#) link. The Query Download page with its previous parameters for that query will appear. Note: the query results will be updated from any transactions which occur between using the same query/same query parameters.



Same Query with different parameters

Access the Query> Query Download File page. Click the '[Update Parameters](#)' link. The query prompts will appear. Enter the prompt fields and click Ok. The Query Download File will return Click **RESET**, then **Run Batch** when it appears. Follow steps 2-3 on page 6.

QUERY SCHEDULE

The Query Schedule has the Query Download functionality along with the added functionality to schedule the query to run at a specific date/time. If running queries that access large amounts of data, it is recommended that the query schedule be used to schedule the query to run outside of normal business hours.

Step 1. Access query: Navigation: Reporting Tools> Query> Query Viewer, enter query or search for a query. On your selected query, click the [Schedule](#) Link.

Query Viewer 1

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

*Search By: Query Name 2 begins with NDU_PO09

Search 3 [Advanced Search](#)

Search Results

*Folder View: -- All Folders -- v

Query	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites	Query Download
NDU_PO09_PO_DTL_BY_BU_CF	PO Dtl by Bus Unit & Chart Fld	Public		HTML	Excel	Schedule 4	Favorite	Query Download

Step 1a and 1b. Run Control

A new run control page will appear: set up a run control **once** for **each query** you may want to have for download capabilities. It is suggested to name your Run Control similar to your selected query.

<p>Step 1a: On the Add a New Value Tab, enter in your Run Control ID</p> <p>Click ADD</p>	<p>Step 1b: Complete the fields as desired.</p> <p>Click OK</p>
<p>Scheduled Query 1</p> <p>Find an Existing Value Add a New Value</p> <p>Query Name: NDU_PO09_PO_DTL_BY_BU_CF</p> <p>Run Control ID: NDU_PO09_PO_DTL_BY_BU_CF 2</p> <p>Add 3</p> <p>Find an Existing Value Add a New Value</p>	<p>NDU_PO09_PO_DTL_BY_BU_CF</p> <p>Business Unit: UND01 magnifying glass</p> <p>Entered Date From: 1-1-08 calendar</p> <p>Entered Date Through: 12-15-08 calendar</p> <p>Dept Like: % magnifying glass</p> <p>Fund Like: % magnifying glass</p> <p>Project Like: % magnifying glass</p> <p>OK Cancel</p>

Step 2. Query Schedule Page

Schedule Query

Run Control ID: NDU_PO09_PO_DTL_BY_BU_CF [Report Manager](#) [Process Monitor](#)

Query Name:

*Description:

[Update Parameters](#)

Prompt Name	Value
BUSINESS_UNIT	UND01
ENTERED_DT	2008-01-01
ENTERED_DT	2008-12-15
DEPTID	%
FUND_CODE	%
PROJECT_ID	%

1. Enter a description as desired.
2. Click OK.

OK Cancel Apply

Step 3. Process Scheduler Page

Process Scheduler Request

User ID: phurdelbrink Run Control ID: NDU_PO09_PO_DTL_BY_BU_CF

Server Name: Run Date: 31

Recurrence: Run Time: [Reset to Current Date/Time](#)

Time Zone:

Process List

Select	Description	Process Name	Process T	Location
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application	Location

1. The Current Date will default as the Run Date. Change to the desired date.
2. The Current Time will default as the Run Time. Change to the desired time including the AM/PM designation.
3. Click OK and the query will run at the designated time.

OK Cancel

Step 4. Access the Query Results: Navigation: PeopleTools > Process Scheduler > Process Monitor. Enter in the userid and the appropriate information in the last field to obtain the results based on the time the query was scheduled to run. For example, if the query was scheduled to run on 3/10/2010 and it was 3/11/2010, the user might use 1 in the last field and select Days from the dropdown menu or use 24 in the last field and Hours in the dropdown menu.

1.

Process List [Server List](#)

View Process Request For

User ID: phurdelbrink Type: Last: 1 Days

Server: Name: Instance:

Run Status: Distribution Status: Save On Refresh

Process List [Customize](#) | [Find](#) | [View All](#) | [First](#) | 1-4 of 4 | [Last](#)

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	5544710		Application Engine	PSQUERY	phurdelbrink	03/10/2010 4:15:00PM CST	Success	Posted	Details

Click on the Details hyperlink to access the query results.

2.

Process Detail

Process

Instance: 5544710 Type: Application Engine
Name: PSQUERY Description: PSQUERY
Run Status: Success Distribution Status: Posted

Run **Update Process**

Run Control ID: NDU_PO09_PO_DTL_BY_BU_CF Hold Request
Location: Server Queue Request
Server: PSNT Cancel Request
Recurrence: Delete Request
 Restart Request

Date/Time **Actions**

Request Created On: 03/10/2010 4:14:04PM CST
Run Anytime After: 03/10/2010 4:15:00PM CST
Began Process At: 03/10/2010 4:15:16PM CST
Ended Process At: 03/10/2010 4:17:47PM CST

[View Log/Trace](#)

Click on the View Log/Trace to drill down to the file.

3.

View Log/Trace
Report

Report ID: 3943509 Process Instance: 5544710 [Message Log](#)
Name: PSQUERY Process Type: Application Engine
Run Status: Success

NDU_PO09_PO_DTL_BY_BU_CF

Distribution Details

Distribution Node: NT Expiration Date: 05/09/2010

File List

Name	File Size (bytes)	Datetime Created
AE_PSQUERY_5544710.stdout	287	03/10/2010 4:17:47.657000PM CST
NDU_PO09_PO_DTL_BY_BU_CF-5544710.csv	118,912	03/10/2010 4:17:47.657000PM CST

Distribute To
Distribution ID Type
User

Click on the csv hyperlink to open the file in excel

4.

Microsoft Office Excel

The file you are trying to open, 'NDU_PO09_PO_DTL_BY_BU_CF-5544710.xls', is in a different format than specified by the file extension. Verify that the file is not corrupted and is from a trusted source before opening the file. Do you want to open the file now?

Yes No Help

The above message will appear on top of the data in the excel file that is created. The file name will vary depending on the query that is being run. Click on Yes.

5. The excel file will appear.

Re-Run Query -

To use the Query Schedule for the same query, open the query using Query Viewer click on the [Schedule](#) link. The Query Schedule page with its previous parameters for that query will appear. Click on the [Update Parameters](#) link to change the parameters. Click on OK and Query Schedule Page will appear. Click on the [Run](#) link. The Process Scheduler page will appear where the user can change the date/time from the current date/time and click OK to schedule the query.