

Running PeopleSoft Query Viewer and Running Query to Excel – Basic Steps

Query Viewer enables you to:

- Search for a query using the basic or advanced search functions.
- Run a query (which displays results in a new browser window).
- Download the results to an Excel spreadsheet (or a CSV Text file).
- Print a query: Before you can print query results, you must run the query.

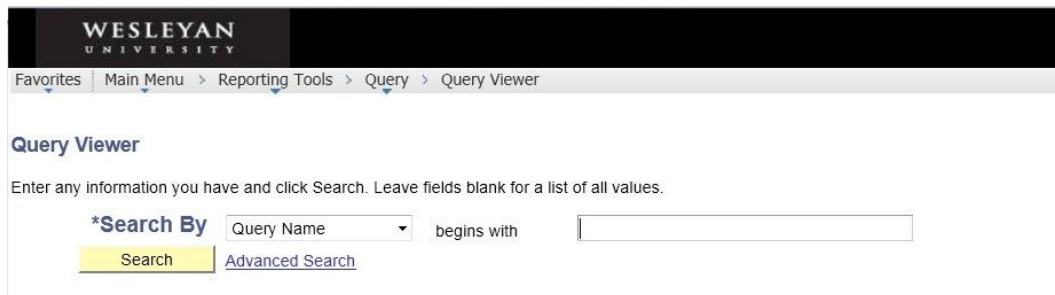
1. In PeopleSoft , in either the Test or Production Database, navigation: **Reporting Tools > Query > Query Viewer**



The **Query Viewer search** page has these main elements:

- a. **Search By** dropdown box – the default is Query Name
- b. *“begins with”* text box – the box in which the query name or beginning letters of the query name are typed
- c. **Advanced Search** link – provides you with additional means to search for the wanted query
- d. **Search** button

2. If you know the name of the query you would like to run, you can type all or part of the name into the box next to *“begins with.”*



3. Click the yellow Search button (or hit Enter).

4. Depending upon what you type, either one query or a listing of queries will appear. In this example, the search is for all queries that begin with “WXY” (typed in either upper or lower case). There are two such queries, one of them Private and one of them Public.

Query Viewer

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

*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
WXY_TEST_PVT	Sample of query description	Private	TRAINING	HTML	Excel	XML	Schedule	Favorite
WXY_TEST	Sample of query description	Public	TRAINING	HTML	Excel	XML	Schedule	Favorite

The **Search Results** section in **Query Viewer** has these main elements:

- **Folder View** dropdown – the default is “—All Folders —” (see **Folder**)
- **Query Name** – displays all of the queries that meet the criteria you searched on. The queries are always shown in upper case. Query names do not have spaces in them. Query naming conventions will be discussed later.
- **Description** – a brief description of the Query
- **Owner** – Public or Private. Private queries are only accessible by the user who created them. The Public option enables other users to access the query if they have access to public queries. A public query is accessible when you have been granted access to the public query and you have access to all records used by the public query.
- **Folder** – Folder creation is available through Query Manager and enables the user to organize queries to make them easier to locate
- **Run to HTML** – You can use this link to run the results of the query to an Excel file or a CSV text file. In general you should use the next option, **Run to Excel**
- **Run to Excel** – Use this option to copy the results to an Excel file for further analysis and printing
- **Schedule** – You would not normally use this option
- **Add to Favorites** – If you have certain queries you run on a regular basis, you may want to select this option. When you click on the link, the query is automatically added to your favorite queries list. Thereafter, when you open Query Viewer, it will appear at the bottom of the page under the heading **My Favorite Queries**

5. **To view the results of a query:** Find the query you would like to run and click on the blue **HTML** link toward the right. (Note that, depending your browser setting, Internet Explorer will place a tab at the top of the screen containing the query output. Read further information about Internet Explorer under the section on running a query to Excel.)
 - a. In this example, the query output has two fields. Each row is numbered on the left. You will see on the right that there are 47 rows all together.
 - b. You can download the query results at this point, as indicated at the top, into an Excel spreadsheet or a CSV text file.

- c. If the query has one or more prompts, read over the information in the next section.

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1 kb)

View All First 1-47 of 47 Last

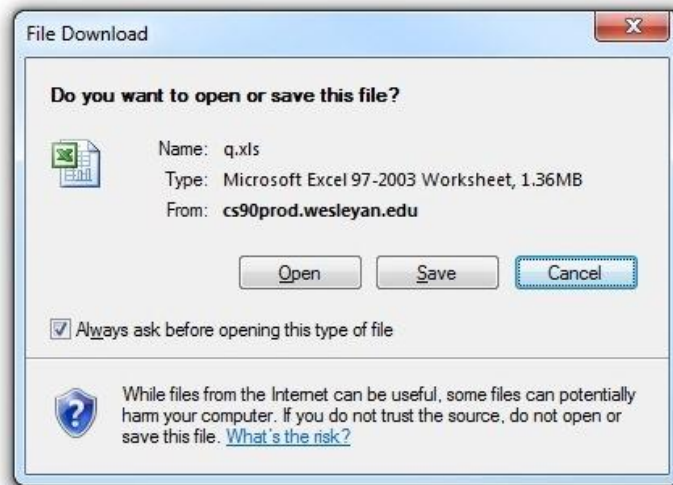
	ID	Term
1	WSLYN	0989
2	WSLYN	0991
3	WSLYN	0996
4	WSLYN	0999
5	WSLYN	1001
6	WSLYN	1006
7	WSLYN	1009
8	WSLYN	1011
9	WSLYN	1016

- 6. **To run a query to Excel:** Find the query you would like to run and click on the blue **Excel** link toward the right.
 - a. NOTE: If you use *Internet Explorer*, depending upon your browser settings, one or both of the following may occur:
 1. You may need to hold down the Ctrl key while clicking on the Excel link.
 2. A new tab will open at the top similar to this one. You may need to hold down the Ctrl key while selecting this tab.

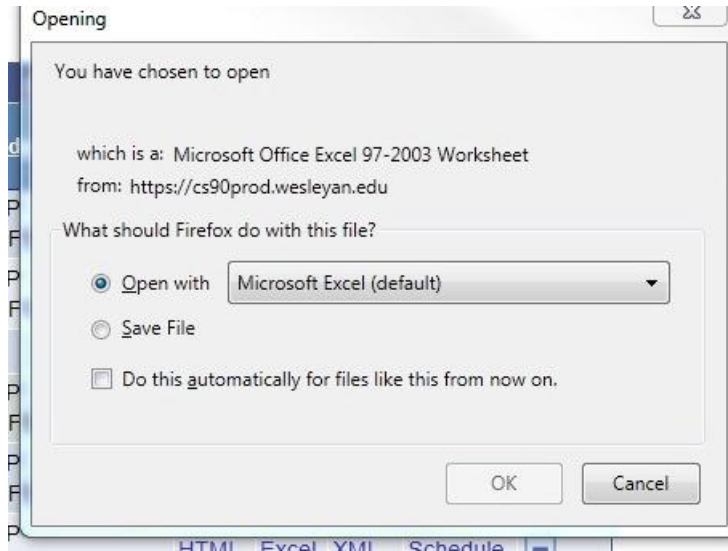


- b. **Queries without Prompts:** If the query does not prompt you for criteria, the following will occur. Depending upon your settings, a popup menu may appear based on the browser you are using. The menu asks if you want to Open or Save the Excel file. Note that with either browser you can choose whether to be asked before opening this type of file - see the checkbox on each menu. In most instances you will want to open and view the file, but if you wish you can save it at this time.

i. Internet Explorer:



ii. Firefox:



- c. **Queries with Prompts:** If this query uses a prompt, there is one extra step to run the query to Excel. (See Note 6a above regarding Internet Explorer).

- i. In either browser, a page with one or more boxes similar to this appears:



- i. The text beneath the prompt(s) is a display of the names (labels) of the fields that will be shown when the query is run. In this example, the field names of “ID,” “Due DtCd” and “Term” are shown.
- ii. Enter the desired criteria in the prompt box(es).
- iii. If one of the prompted items is the Admit Term, the Admit Term must be entered (and you cannot use a wildcard for the Admit Term).
- iv. **Wildcards:** If the phrase “(% to see all)” is part of the prompt, you can enter a % sign to see everything in that field. If there is more than one prompt box, you may enter a code in one box and a % in another.
 - a. To narrow down the selection in a prompt with a wildcard:
 - a. You may enter the entire name.
 - b. Or you may use the wild card (%) in conjunction with the first few letters of the name, for example, ABC%
- v. Do not leave any prompts blank; they will not return any results. At a minimum, any field with the phrase “(% to see all)” must have the % filled in.

- vi. Click View Results or hit Enter.
- vii. Depending on which browser you're using, a popup menu as shown above will appear. Proceed as indicated above.

d. Rerunning the query:

1. If you would like to rerun the query, access the prompt page again
2. You can change the criteria and create a new Excel file.