

# Writing A Simple Query Job Aid

User Role(s): Agency Query Writer DFS Query Writer Last Updated: 03/09/2023

# Overview

Query Writers can create or modify queries to extract Florida PALM data using the Query Manager tool. This tool allows Query Writers to develop, run, and schedule queries to various formats (e.g., xls, pdf, html and txt/rtf) without writing a Structured Query Language (SQL) statement. In order to create a query, you should understand the data record that holds the data you wish to extract. Use the "Florida PALM Data Dictionary" to see a list of commonly used tables, which are referred to as records in Florida PALM. A simple query uses a single record when creating the query.

Before creating a new query, you may wish to search for an existing report or query to use or identify a query to modify to meet your unique needs. Formatted reports and public queries, including navigational information in Florida PALM, can be found in the Reports Catalog on the Solution page of the Florida PALM website. View the *Running a Query* course in the *PALM TECH* – *Florida PALM Overviews* Learning Path in the People First Learning Management System to learn how to search for an existing query.

# How to Create a Simple Query

- 1. Log into Florida PALM.
- 2. Navigate to the Query Manager page.
  - a. Path: NavBar > Menu > Reporting Tools > Query > Query Manager
- 3. Click the Create New Query link.

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Figure 1: The Query Manager page





- 4. Click the **Properties** link.
- 5. Enter the name of the query in the Query field.
- 6. Enter a short description in the **Description** field.
- 7. Select "User" from the Query Type dropdown.
- 8. In the **Owner** dropdown, select whether you are creating a private or a public query.
- 9. Select the **Distinct** check box.
- 10. Click the **OK** button.



Figure 2: The Query Properties page





- 11. On the **Records** tab, enter the name of the record containing your desired data values using the **Search By** field.
- 12. Click the Search button.
- 13. Select the desired record by clicking the Add Record link.

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14. On the Query tab, select the checkboxes for the fields desired in the query results.

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Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional so records by clicking the records tab. When finished click the fields tab.	
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🗆 🔤 JOURNAL_ID - Journal ID 😵	
🛛 🗠 JOURNAL_DATE - Journal Date	Add Criteria NOTES:
UNPOST_SEQ - UnPost Sequence	
LEDGER_GROUP - Ledger Group	Clicking a funnel button will
KK_BUDG_TRANS_TYPE - Budget Entry Type 74	allow criteria to be added for
Figure 4: The Query tab	that specific field





15. On the **Expressions** tab, click the **Add Expression** button to calculate or modify a value that PeopleSoft query does not provide by default.

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Return To Search		the Edit button		

Figure 5: The Expressions tab

- 16. On the **Edit Expression Properties** page, select the desired **Expression Type** from the dropdown.
- 17. Select the field to modify by clicking the **Add Field** link.
- 18. Enter the calculation in the **Expression** field.
  - a. For example, to update a field's data values output to two decimal places, you would create an expression as shown in Figure 6.
- 19. Click the **OK** button.



Figure 6: The Edit Expression Properties popup





20. On the Fields tab, you may view, edit, and format the fields selected on the Fields tab:

- a. Click the **Edit** button to edit the field name (Heading Text).
- b. Click the **Reorder/Sort** button to modify the order in which the fields are displayed or sort the Query results.

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Figure 7: The Fields tab

21. On the **Edit Field Properties** page, you can adjust your field name(s) using the options in the **Heading** section.

22. Click the **OK** button.

	Edit Field Propertie	es ×
		Help
Field Name A.BUSINESS_UNIT - Busin	Aggregate  None Sum Count Min Max Average	<ul> <li>Heading NOTES:</li> <li>Clicking the RFT Short or RFT Long radio button changes the length of the column header text. The value of the RFT Short / RFT Long description can be seen in the Heading Text field on the Fields tab after the selection has changed.</li> </ul>
OK Cancel	○ Count Distinct	<ul> <li><b>RFT Short</b> displays the database short description of the field</li> <li><b>RFT Long</b> displays the long database description of the field</li> </ul>

Figure 8: The Edit Field Properties page

23. On the Edit Field Ordering page:

- a. Use the **New Column** section to change the physical order of the field columns of the query results.
- b. Use the New Order By section to change the sort order of the query results.





# 24. Click the **OK** button.

			Ec	lit Field Ordering				×		
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ОК	Ca	ancel	Values are not required for all fields and do not have to be in a sequential order							

Figure 9: The Edit Field Ordering page

25. The **Criteria** tab allows users to filter the results when a query is run. To add a criterion, click the **Add Criteria** button.

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~	A.BUSINESS_UNIT - Business Unit     equal to     40000     Edit     —										

Figure 10: The Criteria tab

- 26. On the **Edit Criteria Properties** page, fill in the **Expression 1** section, unless already populated from the **Query** or **Field** tabs. In the example shown, the data in the output is limited to a specified business unit.
  - a. Leave the Field radio button selected in the Choose Expression 1 Type section.
  - b. Select the desired field using the Look Up icon in the Choose Record and Field section.





- c. Use the **Condition Type** dropdown to select how **Expression 1** will be compared to **Expression 2**.
- 27. Fill in the **Expression 2** section:
  - a. Select the **Constant** radio button in the **Chose Expression 2 Type** section.
  - b. Type the desired value in the Constant field
- 28. Click the **OK** button

Edit Criteria Properties Choose Expression 1 Type	S Expression 1
● Field ○ Expression	Choose Record and Field Record Alias.Fieldname A.BUSINESS_UNIT - Business Uni
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OK Cance	- 

Figure 11: The Edit Criteria Properties page

- 29. You can save a query at any time after selecting at least on record and field. To save the query, click the **Save** button.
  - a. The **Save** button is available on tabs except the **Run** tab.
- 30. On the **Run** tab, use the **Download to Excel** and **Download to XML** links to export your query results.





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Figure 12: The Run tab

- 31. To share a private query with other agency users, return to the Query Manager page.
- 32. Search for desired query using the Search By field and clicking the Search button.
- 33. Select the checkbox next to the desired query in the Search Results section.

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Figure 13: The Query Manager page

- 34. In the Search Results section, click the Action dropdown.
- 35. Click the Copy to User list item.
- 36. Click the **Go** button.





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Figure 14: The Action dropdown

- 37. Type the desired user's User ID.38. Click the OK button.

	×		
	Help		
Enter the user id to copy the selected queries to:			
User ID OK Cancel	User IL The Us entered use to I correct	<b>User ID</b> NOTES: The <b>User ID</b> must be entered exactly as they use to log in (e.g., correct capitalization)	

Figure 15: Selecting a user

39. Click the **OK** button in the pop up.





1 querie(s) were successfully copied to user Note: If the target user does not have permission to access all the records in a copied query, that query will not appear in the target user's list of queries. Once permission has been granted, the query security administrator for further assistance. OK Image NOTES: The message state how many queries were added to the specified user To share a query with multiple users, repeat the previous steps Image Note: Image

Figure 16: Confirmation Message

Still have questions? Please contact the Florida PALM Solution Center.

