Powerful PeopleSoft 9.2 Connected Query

Session ID#: 103300

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SpearMC Consulting

Administrative Notes

Please:

- **Silence Audible Devices**
- **Note Fire Exits**
- **Partake of Refreshments**
- **Note Quest Staffers (green shirts) and Room Monitors**
- **Complete Feedback Form**
- **Ask Questions**

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About SpearMC and Your Presenter

About SpearMC

Founded in 2004, SpearMC is a technology and professional services firm specializing in

- PeopleSoft Financials and Supply Chain Management

- PeopleSoft Human Capital Management and Payroll

- ERP Architecture and Application Development

- Project and Program Management (PMO)

- Change Management

- ERP Training

- Mobile Technology

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About SpearMC

Regional offices in Chicago, Denver, Oklahoma City, Seattle and San Francisco

- We focus on local market delivery and capability development in line with industry focus areas unique to the regions we serve.

- Our local and well-connected network of top-tier business analysts, technical leads, developers and project managers keep travel cost to a minimum.

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About SpearMC

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Services and Competencies

Technology and Business Consulting

- Full-service ERP and BI Selection, Implementation and Integration
  - PeopleSoft
  - JD Edwards
  - Oracle EBS
  - Hyperion
  - Dynamics AX

- ERP Training

- IT Transformation and Strategy

- Infrastructure and Architecture

- ERP Application Development

- Capability Assessment

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Services and Competencies

Program and Project Management

- Project Management Office

- Project Portfolio Management

- Change Management

Business Transformation

- Operations Improvement (Six Sigma, Lean)

- CIO and CTO Advisory Services

- Strategy for Pricing and Revenue Enhancement

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Methods and Tools.

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Methods and Tools

Needs Analysis

- IT Strategy and Transformation

- ERP Selection and Integration

- Business Transformation

- Project Management

Assess Staffing Requirements

- Complement Existing Expertise

- Capability Assessment

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Methods and Tools

Tools, best practices and proven management techniques include:

- Continuous Improvement

- Six Sigma and Lean

- Agile Project Management Techniques

- Change Management

What is Connected Query?

- Connected Query is a PeopleSoft Reporting Tool

- Provides additional functionality as an addition to existing PS Query Tool

- Made up of:

  - Connected Query Manager

  - Connected Query Wizard

  - Connected Query Viewer

What is Connected Query

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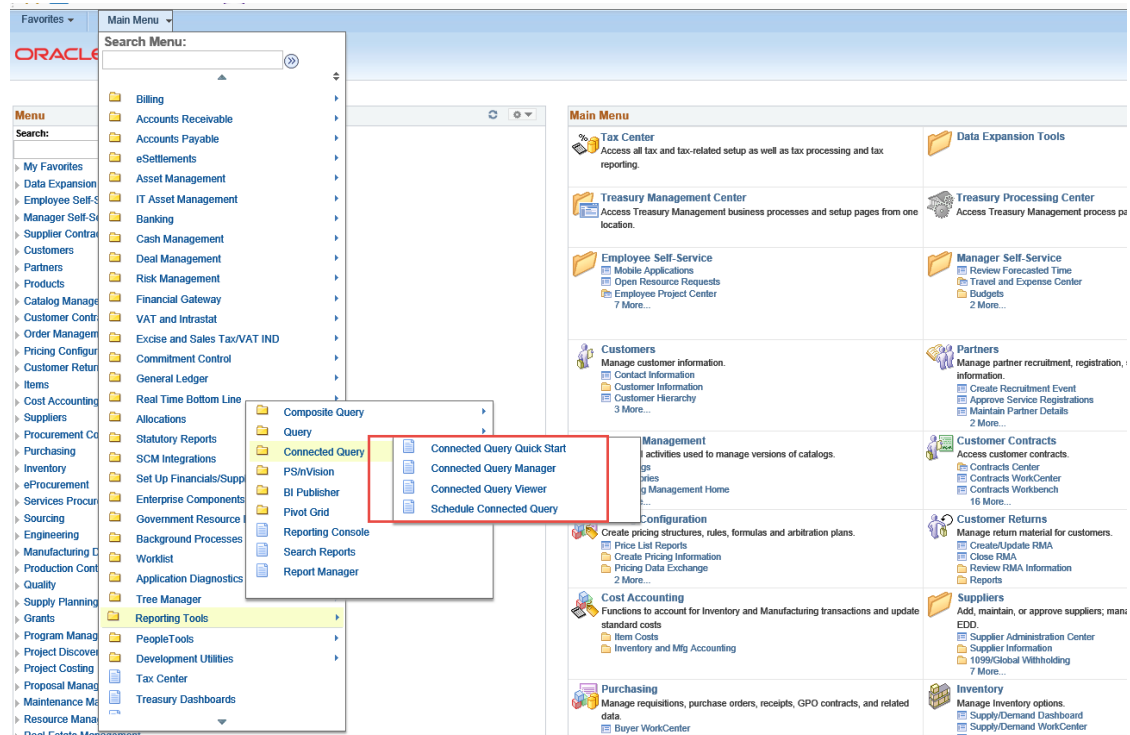
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What is Connected Query?

- A connected Query is a reporting tool that uses other Queries as its data sets (records)

  - Aka……A Query made from multiple Queries

- When a CQ is run, it generates a single XML File

  - The XML file can be used by XML Report Writing tools such as BI Publisher or Crystal

- A connected query is a hierarchical object

  - Has parent-child relationships.

Query 1

Query 2

Query 3

Connected Query Results

Query 1   Query 2   Query 3
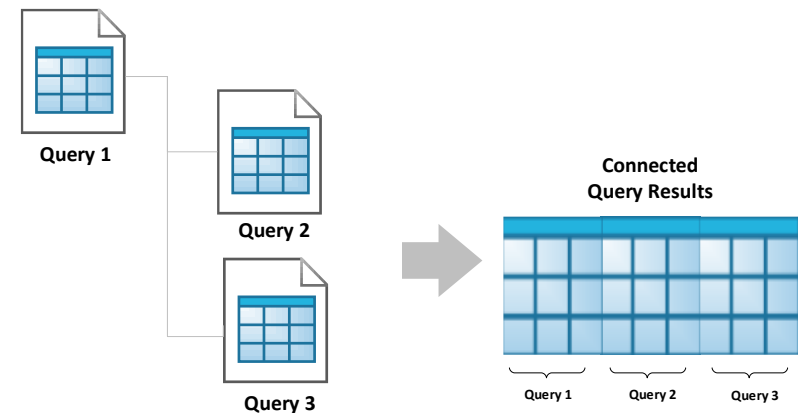
What is Connected Query?

- A parent query can nest multiple levels of child queries and any child query can have multiple sibling queries within a hierarchy.

    - No limits exist for levels, but typical use involves a single parent-child relationship or a few levels of nesting.

Parent (1)

L2-Child 1

L3 - Child 1   L3 - Child m..

L2-Child 2

L2-Child n..

L3 - Child 1
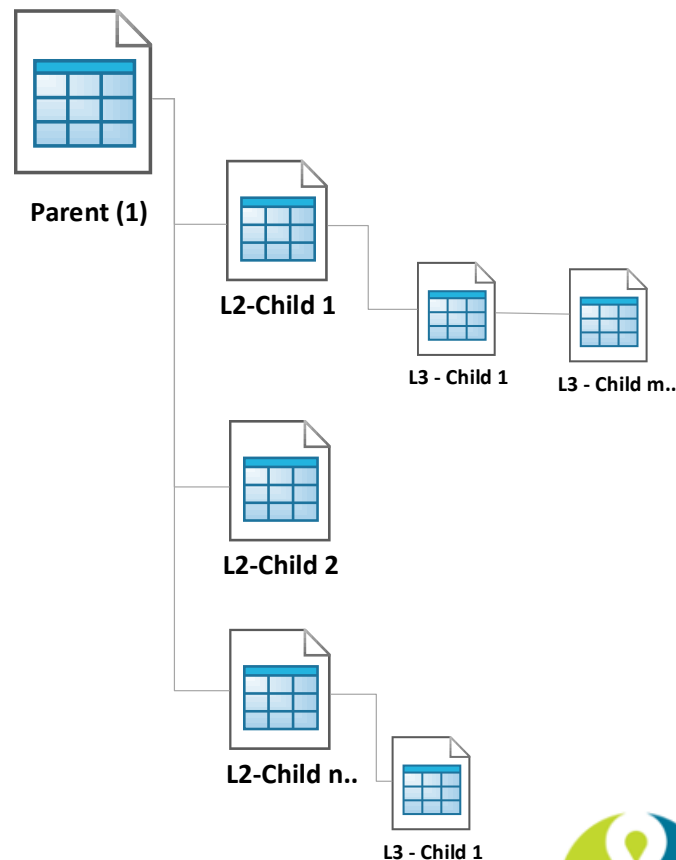
What is Connected Query?

■ Example

Vendor Purchase Orders

| Vendor ID |
| Vendor Name |
| Sum of PO $ |
| Count of POs |

Vendor UnPaid Invoices

| Vendor ID |
| Sum Unpaid Inv $ |
| Unpaid Inv Count |

Vendor Paid Invoices

| Vendor ID |
| Sum Paid Inv $ |
| Count of Paid Inv. |

Vendor ID	Vendor Name	PO $	PO Count	Unpaid Inv $	Unpaid Inv Count	Paid Inv $	Paid Inv Count
12345	SpearMC	$125,000	4	$50,0000	10	$25,0000	6

What is Connected Query?

- A connected query returns a hierarchical XML data set in which data returned by child queries is <u>filtered</u> by the results of its immediate parent query.

  - All Data from the Parent Query is returned.

  - Results only include data from the child query if there is a related row in its parent query.

```xml
<?xml version="1.0" encoding="UTF-8"?>
- <ConnectedQuery xsi:noNamespaceSchemaLocation="" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" query_rows_limit="6" preview="True" name="CQ_DEMO_EXP">
  - <CQ_01_VENDOR_SPEND>
    - <A.VENDOR_ID>
        <![CDATA[SCM0000001]]>
      </A.VENDOR_ID>
    - <A.NAME1>
        <![CDATA[BIKE SHOP]]>
      </A.NAME1>
      <MERCHANDISE_AMT>3101462.27</MERCHANDISE_AMT>
    - <CQ_02_VENDOR_PO_COUNT>
      - <A.VENDOR_ID>
          <![CDATA[SCM0000001]]>
        </A.VENDOR_ID>
      - <B.PO_ID>
          <![CDATA[43]]>
        </B.PO_ID>
      </CQ_02_VENDOR_PO_COUNT>
    </CQ_01_VENDOR_SPEND>
  - <CQ_01_VENDOR_SPEND>
    - <A.VENDOR_ID>
        <![CDATA[SCM0000002]]>
      </A.VENDOR_ID>
    - <A.NAME1>
        <![CDATA[CAMPER'S WAREHOUSE]]>
      </A.NAME1>
      <MERCHANDISE_AMT>1071999</MERCHANDISE_AMT>
    - <CQ_02_VENDOR_PO_COUNT>
      - <A.VENDOR_ID>
          <![CDATA[SCM0000002]]>
        </A.VENDOR_ID>
      - <B.PO_ID>
          <![CDATA[38]]>
        </B.PO_ID>
      </CQ_02_VENDOR_PO_COUNT>
    - <CQ_03_VENDOR_INVOICES>
      - <A.VENDOR_ID>
```

Why It's Cool

- Simplifies process of creating complex Queries by enabling the user to create a few simple Queries and combining the results.

    - Avoid complicated queries with multiple equal, outer joins, and grouping conditions.

- Avoid the need to involve programmers to create an SQR program or create PeopleSoft record Views

Vendor Table

PO HDR

PO Line

PO SHIP

Invoice HDR

Invoice Line

Invoice HDR_1

Invoice Line _2

(+)

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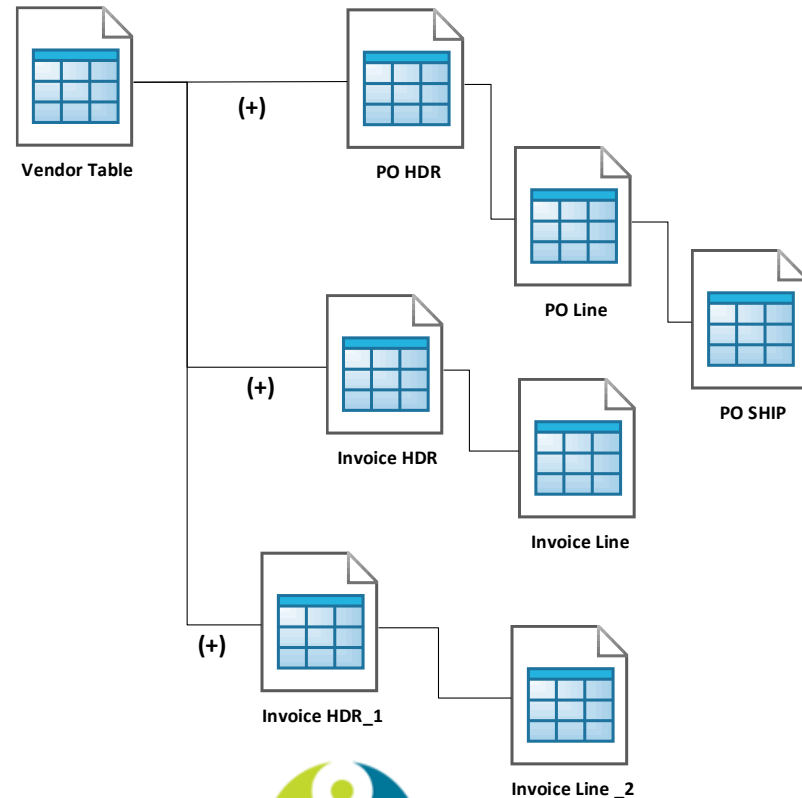
Connected Query Demo

Supplier Activity Report

Steps to Build a Connected Query

- Create Your Parent and Child Queries in PeopleSoft Query Manager.

  - In this examples 1 parent and 2 child queries were created.

  - Make sure to save each of them as either all public or all private.

  - Each Query must have one or more fields in common with it's parent query. This field is used to join the parent and child queries

Steps to Build a Connected Query

- From the Connected Query Manager page, select 'Add New Value'

- Enter a Query Name and Description

- Enter if the Connected Query is Public or Private

Steps to Build a Connected Query

- Click on the lookup icon to choose a parent Query.

  - Note this is the query you created in Query Manager as your 'Parent Query'
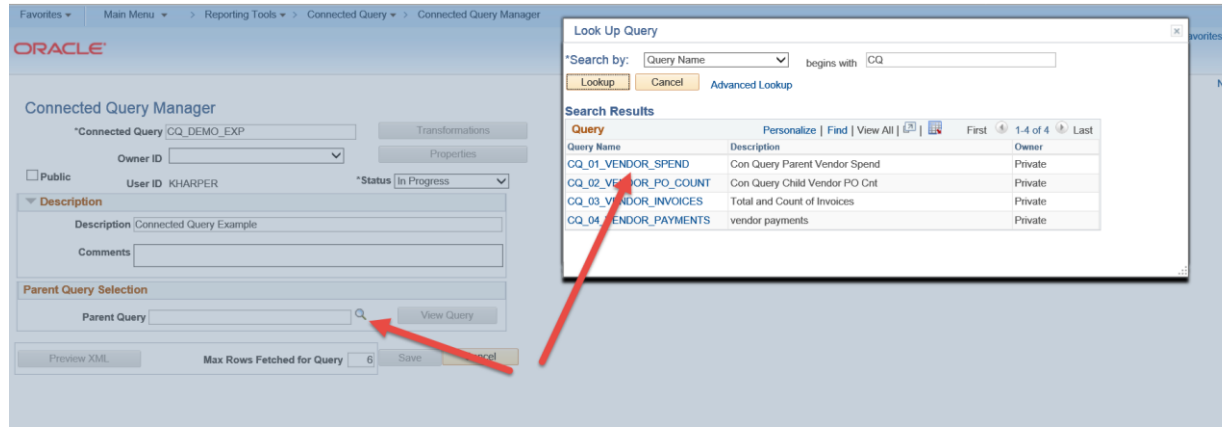
- After you select the parent Query, click on the open Query Icon as shown below
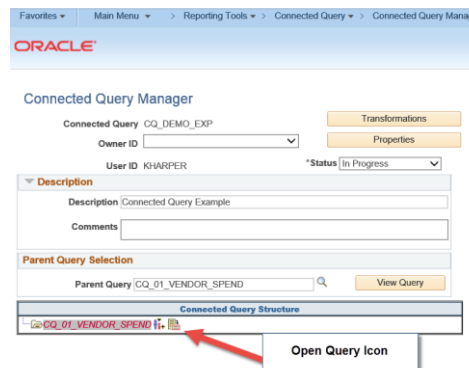
Steps to Build a Connected Query

- The Parent Query is displayed. Click the run tab to see the values that will be included in your results from the parent query.

  - Note the parent Query cannot be updated from this view.
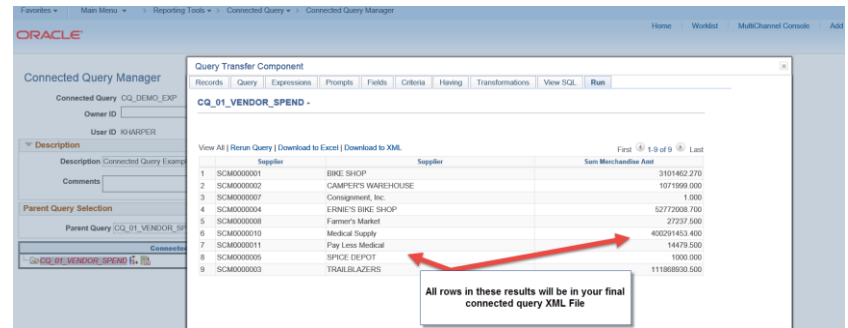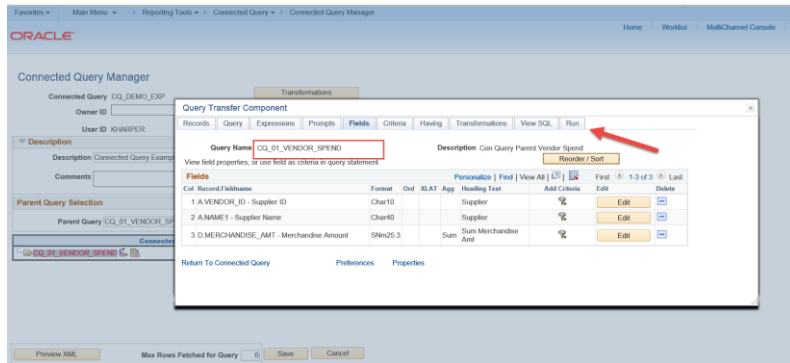
- Choose the 'Insert Child Query' icon
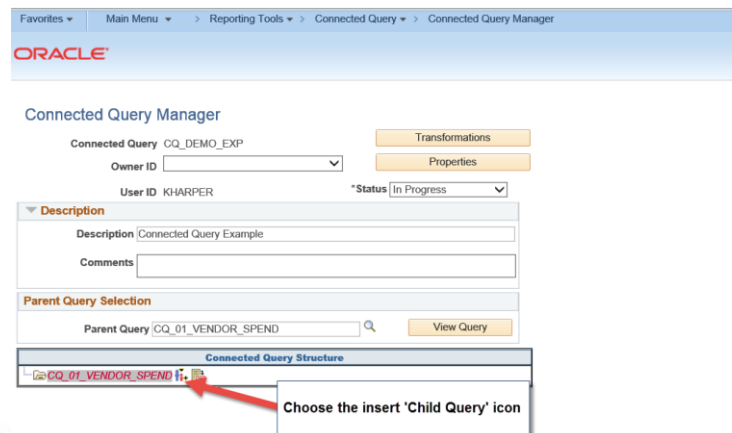
Steps to Build a Connected Query

- Choose a Query to be inserted as a child to the parent.

  - This query was previously created using Query manager
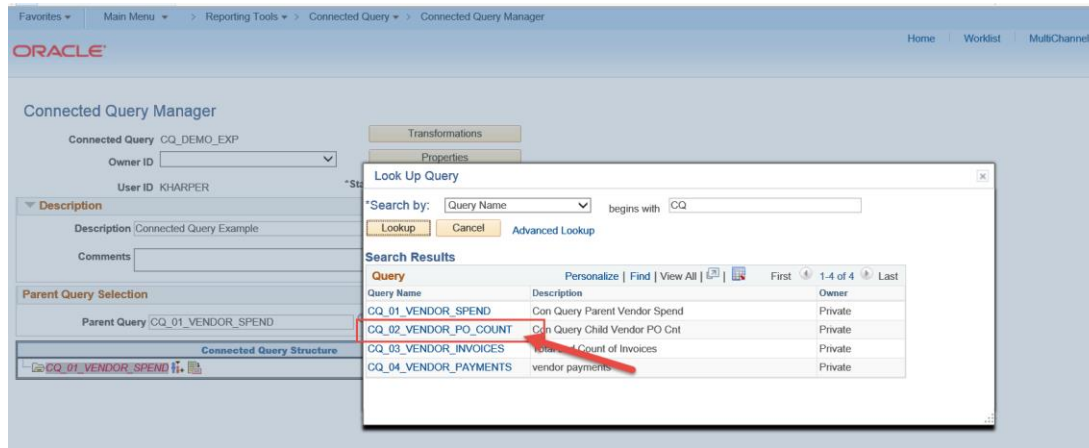
- The Child Query is now shown below the parent Query
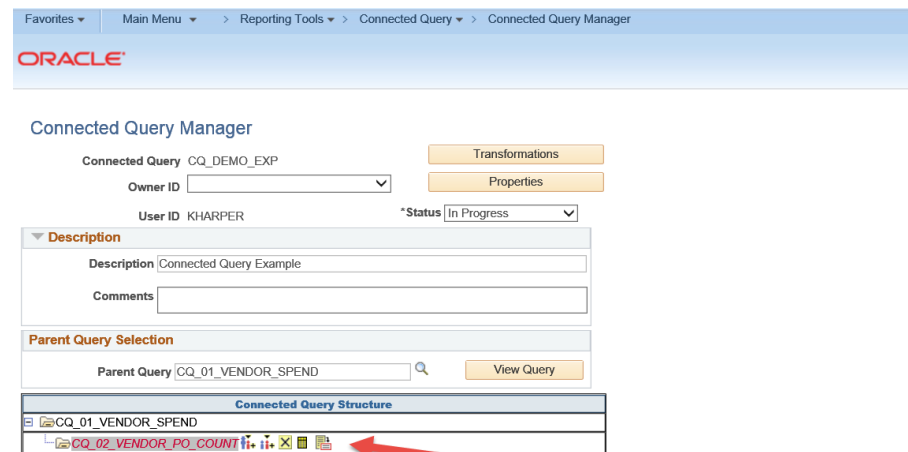
Steps to Build a Connected Query

- Select the 'Open Query' icon next to the child query.

  - The fields displayed will be included in the connected query results.
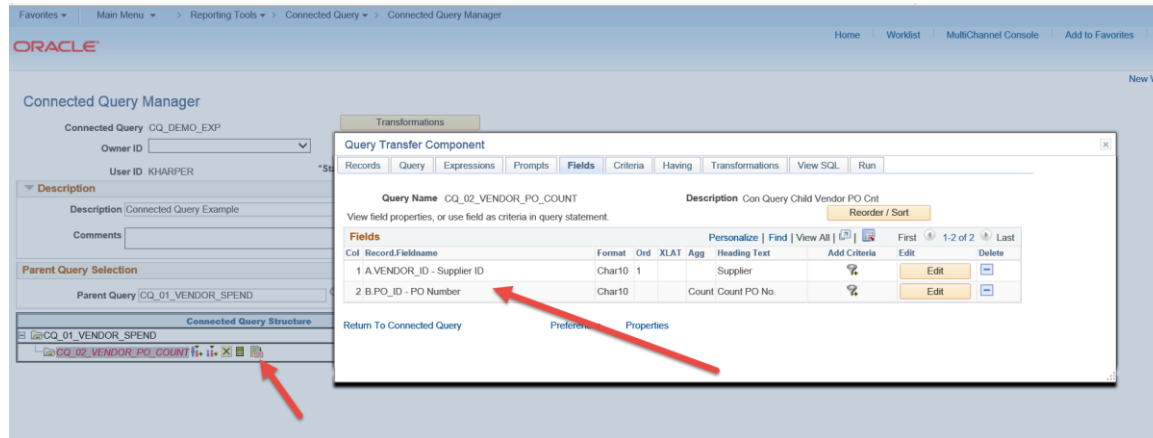
- Note: Only rows in the child query that match the Vendor ID field in the parent Query will be shown.
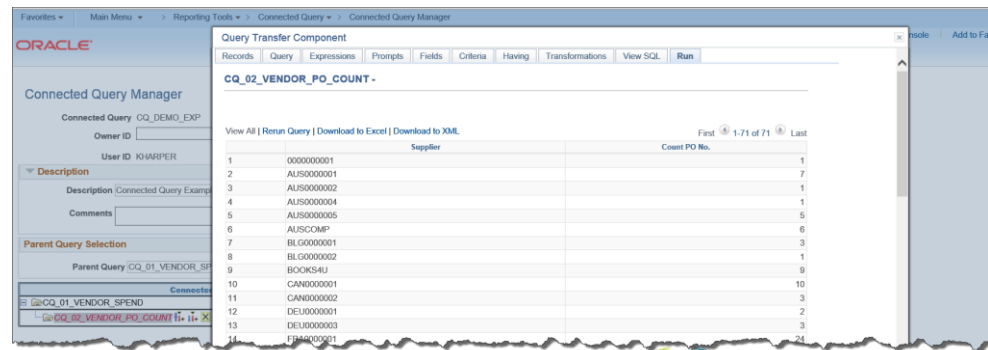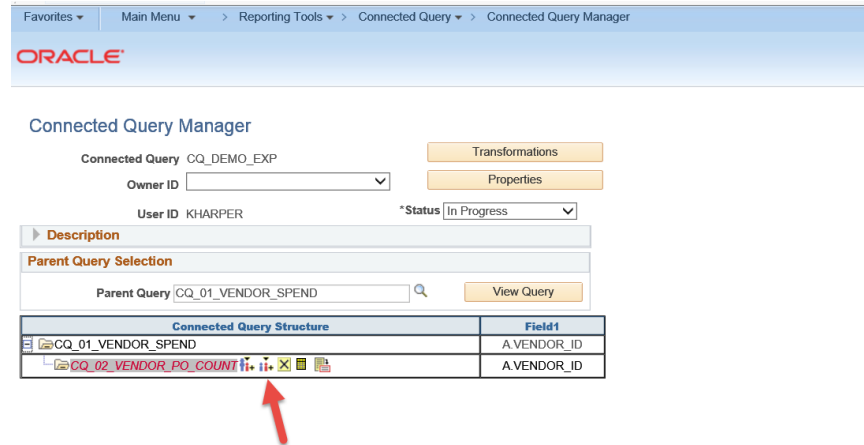
Steps to Build a Connected Query
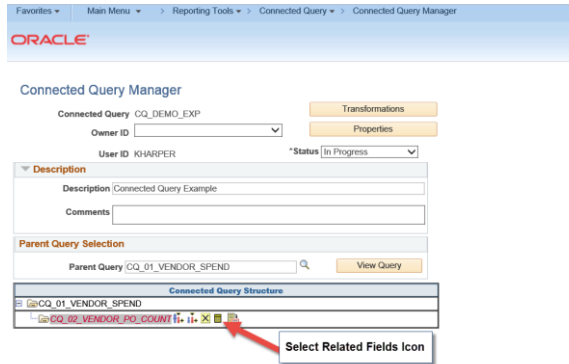
- Select the 'Related Fields' Icon

- Choose the field(s) from the Parent and Child Query which link the two Queries together.
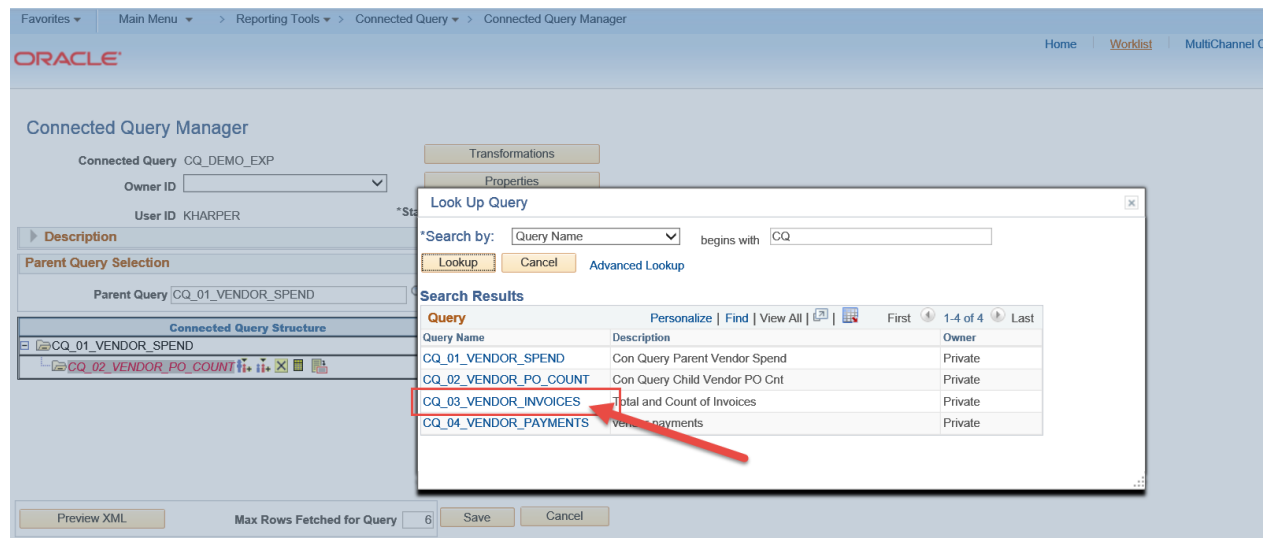
- Click the Map Fields Button
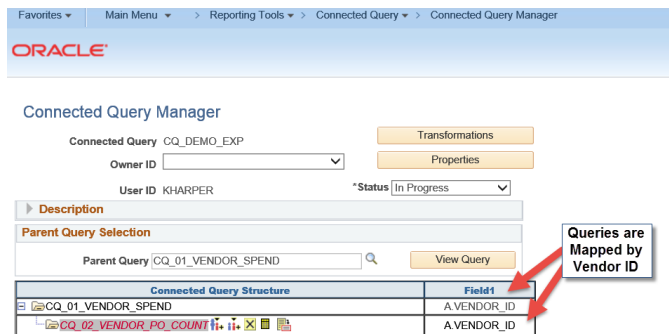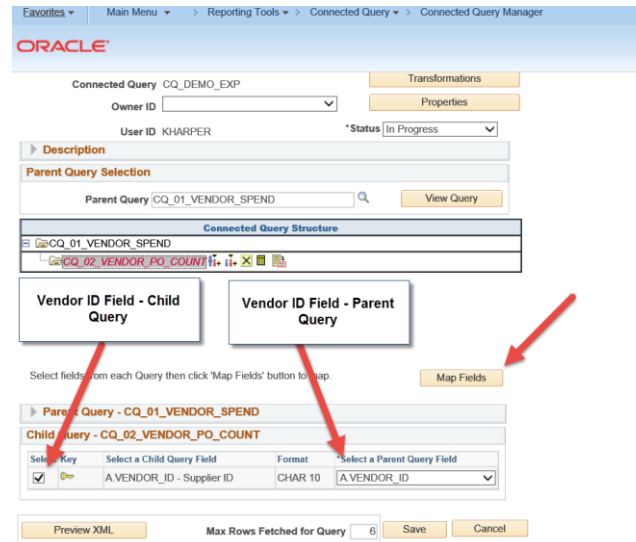
Steps to Build a Connected Query

■ Select the 'Related Fields' Icon
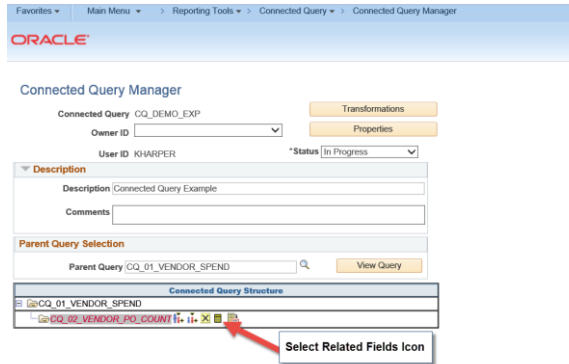
■ Choose the field(s) from the Parent and Child Query which link the two Queries together.

■ Click the Map Fields Button
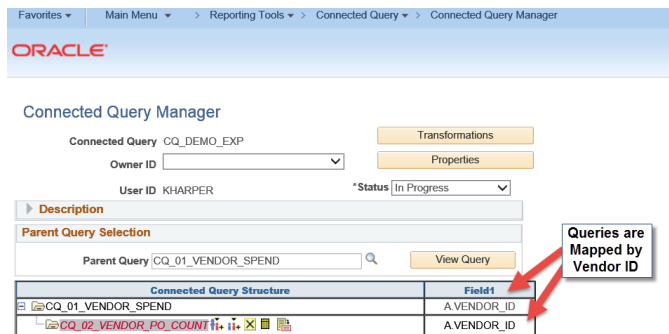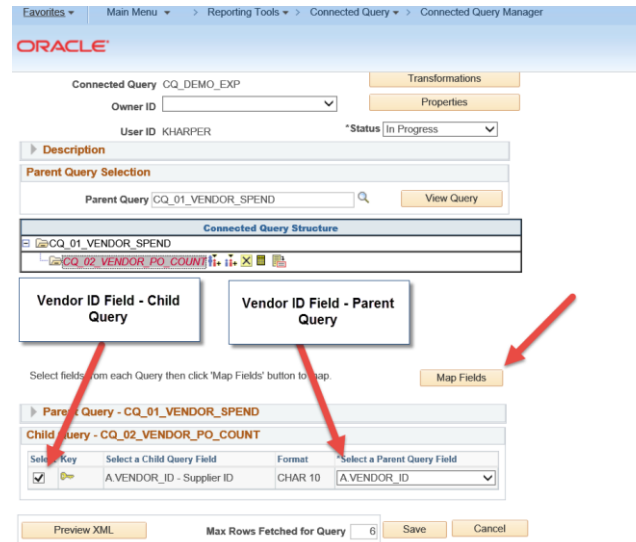
Steps to Build a Connected Query

- Click the 'Insert Sibling' Icon

- Choose a query to be inserted as the 2nd Child Query.

Steps to Build a Connected Query

■ As with the prior child, select the 'Related fields' icon by the newly added query.

■ Choose the fields to map from the parent and child queries.

■ Click the 'Map Fields' button

Select the child and parent fields to Map

Steps to Build a Connected Query

- The Parent and Child Fields are shown as matched by 'Vendor ID'

- Click on the Preview XML Button. The Data results will be shown in XML Hierarchical format.

Favorites ▾ | Main Menu ▾ | > Reporting Tools ▾ | > Connected Query ▾ | > Connected Query Manager

ORACLE

Connected Query Manager

		Transformations
Connected Query	CQ_DEMO_EXP	
Owner ID	[▾]	Properties
User ID	KHARPER	*Status In Progress ▾

▶ Description

Parent Query Selection

Parent Query CQ_01_VENDOR_SPEND 🔍 | View Query

Connected Query Structure	Field1
⊟ 📁 CQ_01_VENDOR_SPEND	A.VENDOR_ID
📁 CQ_02_VENDOR_PO_COUNT	
📁 *CQ_03_VENDOR_INVOICES* 🗙 🔳	A.VENDOR_ID

```
<?xml version="1.0" encoding="UTF-8"?>
- <ConnectedQuery xsi:noNamespaceSchemaLocation="" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" query_rows_limit="6" preview="True" name="CQ_DEMO_EXP">
  - <CQ_01_VENDOR_SPEND>
    - <A.VENDOR_ID>
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      </A.VENDOR_ID>
    - <A.NAME1>
        <![CDATA[BIKE SHOP]]>
      </A.NAME1>
      <MERCHANDISE_AMT>3101462.27</MERCHANDISE_AMT>
    - <CQ_02_VENDOR_PO_COUNT>
      - <A.VENDOR_ID>
          <![CDATA[SCM0000001]]>
        </A.VENDOR_ID>
      - <B.PO_ID>
          <![CDATA[43]]>
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  - <CQ_01_VENDOR_SPEND>
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      </A.VENDOR_ID>
    - <A.NAME1>
        <![CDATA[CAMPER'S WAREHOUSE]]>
      </A.NAME1>
      <MERCHANDISE_AMT>1071999</MERCHANDISE_AMT>
    - <CQ_02_VENDOR_PO_COUNT>
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          <![CDATA[SCM0000002]]>
        </A.VENDOR_ID>
      - <B.PO_ID>
          <![CDATA[38]]>
        </B.PO_ID>
      </CQ_02_VENDOR_PO_COUNT>
    - <CQ_03_VENDOR_INVOICES>
      - <A.VENDOR_ID>
```

Cancel

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Steps to Build a Connected Query

■ Change the Query Status to 'Active' so that the Query is available in the Connected Query Viewer

■ Save the Query

Steps to Build a Connected Query

■ From the Connected Query viewer menu option, choose the 'Run to Window' URL.

■ Click on the Details URL to retrieve the XML Results from the Connected Query

Steps to Build a Connected Query

- The XML File can be saved and opened by any XML viewer such as Word or Excel to validate the results
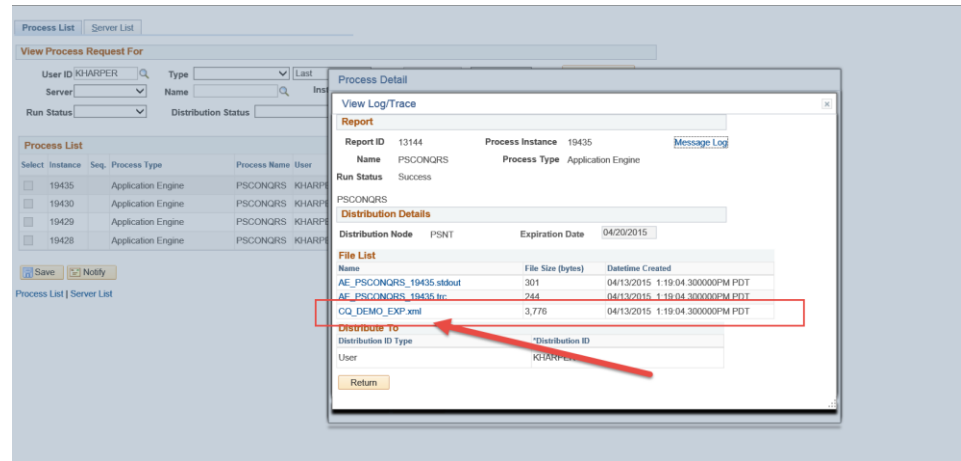
- XML – Connected Query Results Opened in Excel

Connected Query Terms

Parent Query

A parent query in a connected query is a query that has one or many child queries. The top level query in a connected query is the parent query.

Child Query

A child query in a connected query is a query that has a single parent query. A child query can also serve as a parent query if it has one or more child queries in the Connected Query definition. A child query can have one or more sibling queries.

Sibling Query

A sibling query in a connected query is a child query that shares a parent with another child query.

Public Connected Query

Public connected query is a query that can be used by all users.
Note: Public connected queries cannot include any private query.

Get in touch

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