How To Access Public Queries in PeopleSoft

The end-user should perform the steps below to access Public Queries in PeopleSoft. Public and Private Queries may only be accessed in **the Financials Report Database (PSFSRPT)**.

Section 1: Accessing Public Queries via PeopleTools

PeopleSoft Note
The steps in this section should be followed if the end-user has access to Query via **PeopleTools** (proceed to Step 1 of this section).
If the end-user does not have access to Query via **PeopleTools**, please follow the procedures outlined in **Section 2: Accessing Public Queries via Navigator Display**.

Step	Action
1.	Navigate: **Go**, **PeopleTools**, **Query** **(**If you do not have access to PeopleTools, proceed to Section 2
2.	Click: (or Select: File, **Open**)
3.	Click: to display a list of available Public Queries.

Tip
For a description of Public Financials Queries and please see http://www.lsuhsc.edu/ps/support/catalogofqueries.htm.

Step	Action
4.	Using the vertical scroll bar, scroll down the list of queries to locate and highlight the query that you wish to view. To quickly locate a particular query, type the first few letters in the **Name** field and click . The list of available queries will narrow to only those queries that begin with those letters. For example, entering ***LSU*** in the **Name** field and clicking will display only those queries that begin with **LSU**.
5.	Double-click on the selected query to display the query in **Designer View**.
6.	Click to run the query to Grid Control - or - Click to run the query to Excel and view the results in an Excel spreadsheet (See Section 3: Saving Query Output)
7.	If prompted, enter the requested information (Chartstring, Budget Period, etc.) in the **Enter Values** box and click **OK**.

End of Section 1

Section 2: Accessing Public Queries via Navigator Display

Step	Action
1.	Navigate: **View**, **Navigator Display, Query** to display a list of Public queries on the left side of the Query window
2.	Scroll down the list of queries to locate and highlight the query that you wish to view or click anywhere in the list of queries and type the first two characters of the name of the Query – (e.g. typing ***NO*** will automatically scroll down the list to display the proximity of queries whose name(s) begins with ***NO***. Scroll down the list as needed and highlight the query that you wish to view.
3.	Right-click on the highlighted query
4.	Select: **Run to Excel** to view the results in an Excel spreadsheet (See Section 3: Saving Query Output) or **Run** (to view in the query screen)
5.	If prompted, enter the requested information (Chartstring, Budget Period, etc.) in the **Enter Values** box and click **OK**.

End of Section 2

Section 3: Saving Query Output

PeopleSoft Note
The steps in this section should be followed if the end-user has run the query results to Excel. These steps will not work if the end-user has run the query to Grid Control or the Query Screen.

Step	Action
1.	From within the Excel application, navigate **File, Save As** to open the Save As dialog box.
3.	Select the file location by clicking on the drop down arrow next to the **Save In** field and clicking on the drive where you want to save the file.  . You may select folders within the selected drive in which to save the spreadsheet.
3.	Enter the **File Name** and click the  button.

End of Section 3

TIP
For more detailed information regarding running queries, please refer to the Financials Query manual at http://www.lsuhsc.edu/ps/support/finance.htm.