

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.

Favorites ▾ Main Menu ▾ > My Homepage > Query Manager

Florida **PALM**

Query Manager

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

[Find an Existing Query](#) **[Create New Query](#)**

*Search By begins with

[Advanced Search](#)

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.

The screenshot shows the 'Query Properties' dialog box with several annotations. A red dashed box highlights the 'Query' and 'Description' fields. A blue arrow points from the 'Query' field to the 'QUERY NOTES' box. Another red dashed box highlights the 'Query Type' and 'Owner' dropdowns. A blue arrow points from the 'Query Type' dropdown to the 'OWNER NOTES' box. A third red dashed box highlights the 'Distinct' checkbox, with a blue arrow pointing to the 'DISTINCT NOTES' box. The 'OK' button is also highlighted with a red dashed box.

OWNER NOTES:

- DFS Query Writers can create “Public” and “Private” queries
- “Private” queries may be shared with other users
 - If you delete a “Private” query, users that you have shared the query with will still be able to view and use the query
- “Public” queries will be available to all users with the appropriate permissions

QUERY NOTES:

- This field has a maximum of 30 characters and cannot contain spaces
- DFS Query Writers should follow the appropriate naming conventions for the type of query being written
 - Agency specific queries should start with the agency’s acronym
 - Queries applying to all agencies should start with “FLP”
- Agency Query Writers should follow their agency’s query naming conventions

DISTINCT NOTES:

- This field removes duplicates from a query’s output

Image Fields

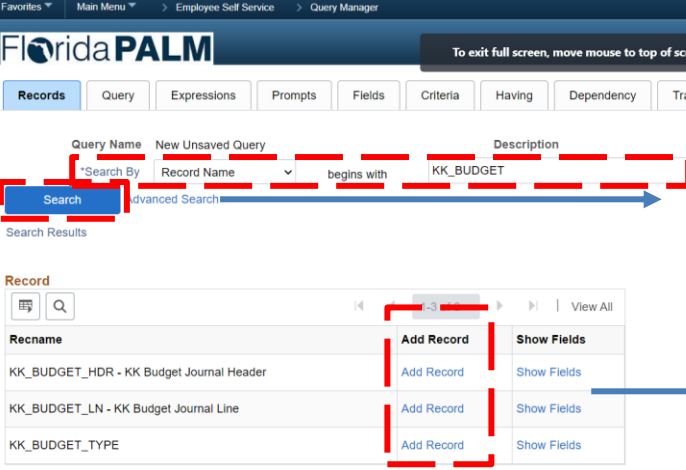
☒ Blank Value
☐ Image Data
☐ Image Hyperlink

Last Updated Date/Time
 Last Update User ID

OK Cancel

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.



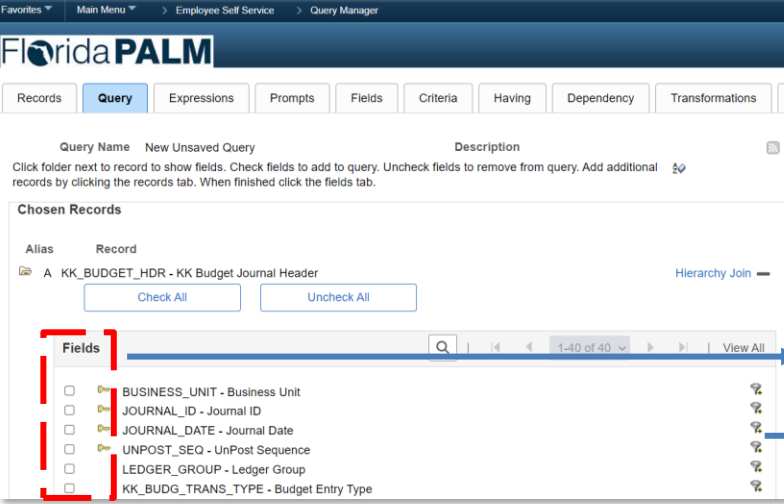
Advanced Search NOTES:
The **Advanced Search** link enables more search fields on the page

- For example, if you know the name of a field you wish to use you should use the **Advanced Search** link

Show Fields NOTES:
Use the **Show Fields** link to preview the fields, if you are unsure if this is the record you wish to use

Figure 3: The Records tab

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



Fields NOTES:
The order which fields are selected is the order the fields will be displayed in the query output

Add Criteria NOTES:
Clicking a funnel button will allow criteria to be added for that specific field

Figure 4: The Query tab

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

The screenshot shows the 'Expressions' tab in the FloridaPALM interface. The 'Add Expression' button is highlighted with a red dashed box. A text box on the right contains the following notes:

Expressions NOTES:
Existing expressions are listed in the **Expressions List** table

- These can be modified by clicking 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.

The screenshot shows the 'Edit Expression Properties' popup. The 'Expression Type' dropdown is set to 'Signed Number' and is highlighted with a red dashed box. The 'Length' is set to 10 and 'Decimals' is set to 2. The 'Expression Text' field contains 'A.POSTED_TOTAL_AMT'. The 'Add Field' link is highlighted with a red dashed box. A text box on the right contains the following notes:

Length NOTES:

- Required for **Expression Type** 'Number' and 'Signed Number'
- Composed of an integer portion and a decimal portion
 - For example, 32.6 has a length of 3 (2 in the integer portion and 1 in the decimal portion)

A text box at the bottom contains the following notes:

Decimals NOTES:

- Required for **Expression Type** 'Number' and 'Signed Number'
- Determines how many numbers are after the decimal point

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

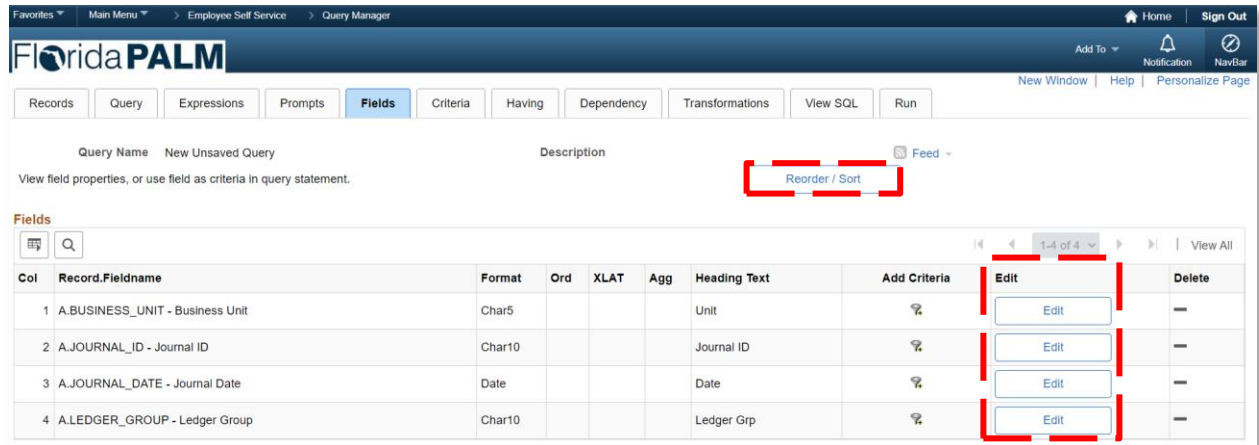


Figure 7: The Fields tab

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.

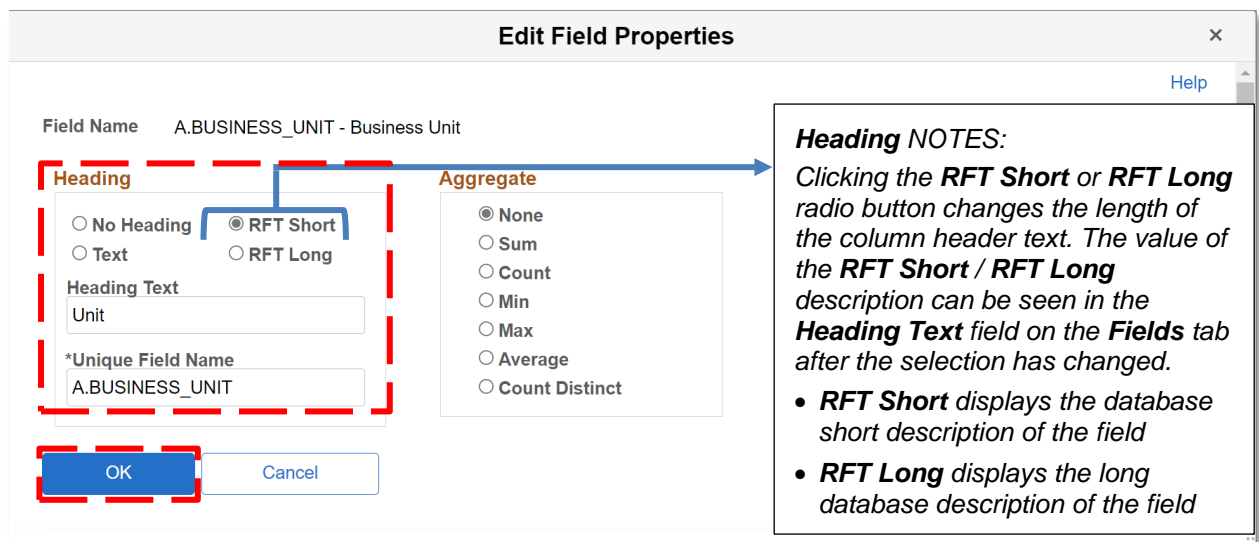


Figure 8: The Edit Field Properties page

23. On the **Edit Field Ordering** page:
- Use the **New Column** section to change the physical order of the field columns of the query results.
 - Use the **New Order By** section to change the sort order of the query results.

24. Click the **OK** button.

Edit Field Ordering

Reorder columns by entering column numbers on the left. Columns left blank or assigned a 0 will be automatically assigned a number. Change the order by number by entering numbers on the right. To remove

Edit Field Ordering

New Column	Column	Record.FieldName	Order By	Descending	New Order By
	1	A.BUSINESS_UNIT - Business Unit		<input type="checkbox"/>	
	2	A.JOURNAL			
	3	A.JOURNAL			
	4	A.LEDGER			

Descending NOTES:
Florida PALM defaults to order by ascending

New Order By NOTES:

- The sort order begins with 1, representing the first field the results should be orderd by, and increments by 1 for each following field
- Values are not required for all fields and do not have to be in a sequential order

OK Cancel

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.

Criteria

Query Name: New Unsaved Query

Add Criteria Group Criteria

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
AND	A.BUSINESS_UNIT - Business Unit	equal to	40000	Edit	—

Criteria tab NOTES:
Any criteria added on other tabs will automatically be shown here

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.
- Leave the **Field** radio button selected in the **Choose Expression 1 Type** section.
 - 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

☒ Field
☐ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname
A.BUSINESS_UNIT - Business Uni

***Condition Type** equal to

Choose Expression 2 Type

☐ Field
☐ Expression
☒ Constant
☐ Prompt
☐ Subquery

Expression 2

Define Constant

Constant

OK **Cancel**

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.

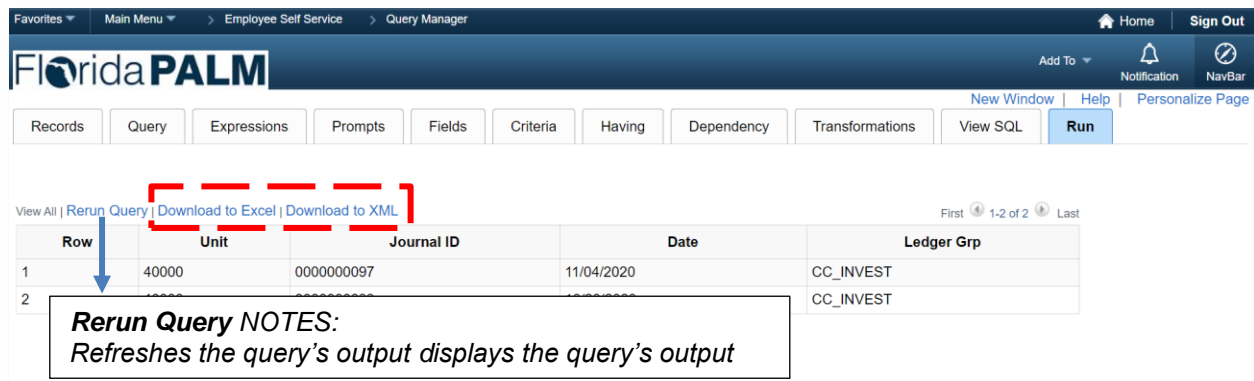


Figure 12: The Run tab

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.

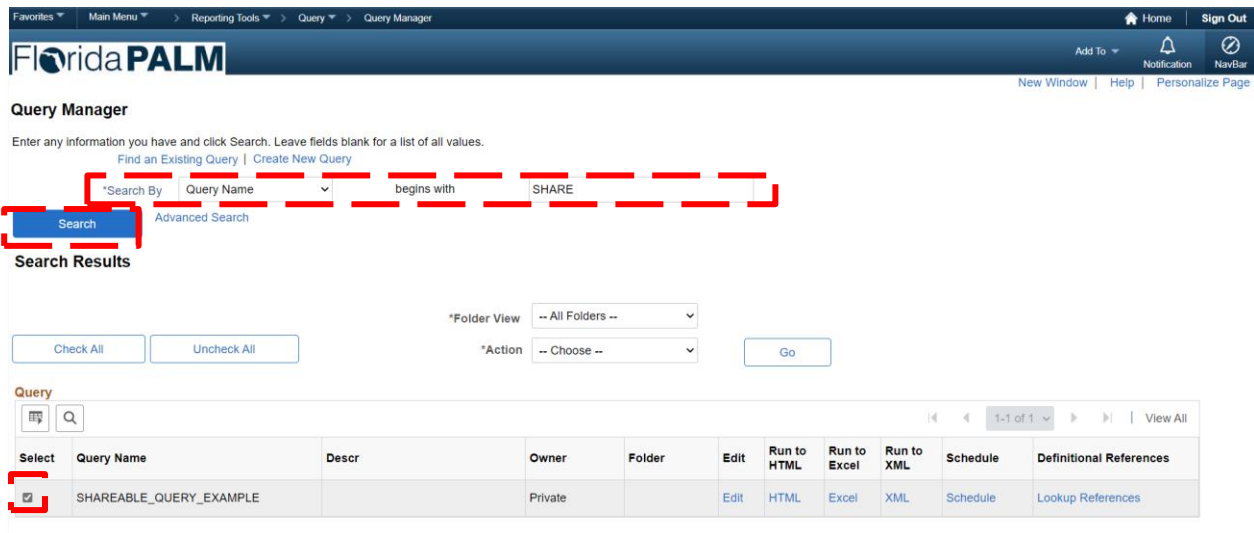


Figure 13: The Query Manager page

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

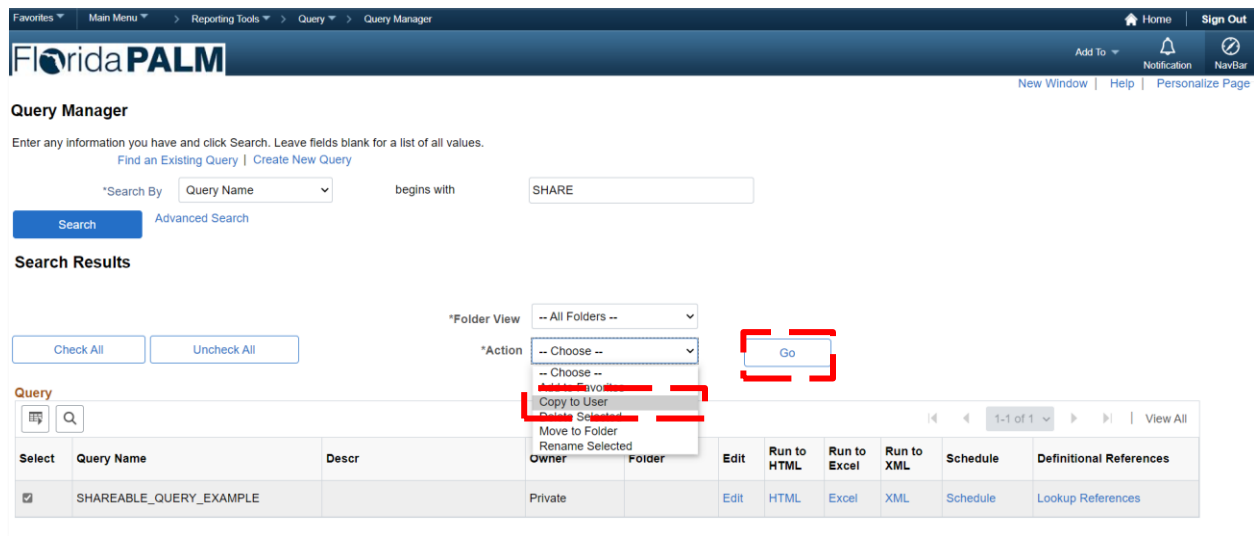


Figure 14: The Action dropdown

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

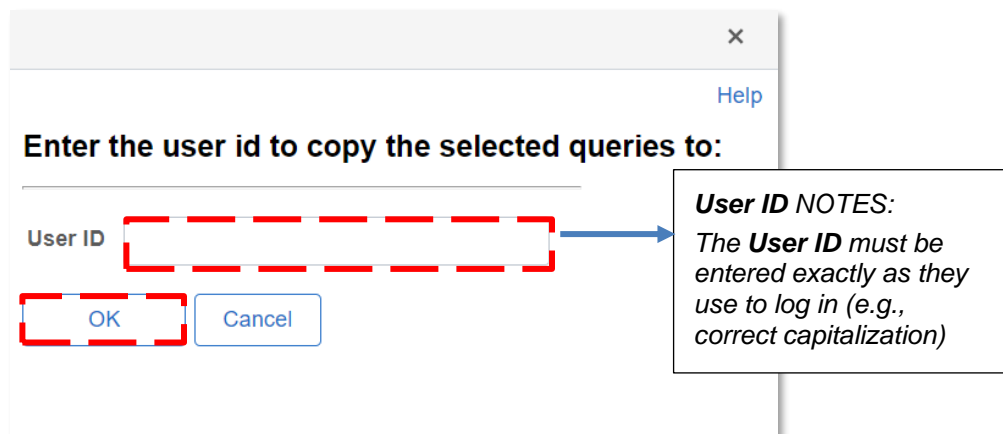


Figure 15: Selecting a user

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

1 query(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

Message NOTES:

- The message state how many queries were added to the specified user
- To share a query with multiple users, repeat the previous steps

Figure 16: Confirmation Message

Still have questions?

Please contact the [Florida PALM Solution Center](#).