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.

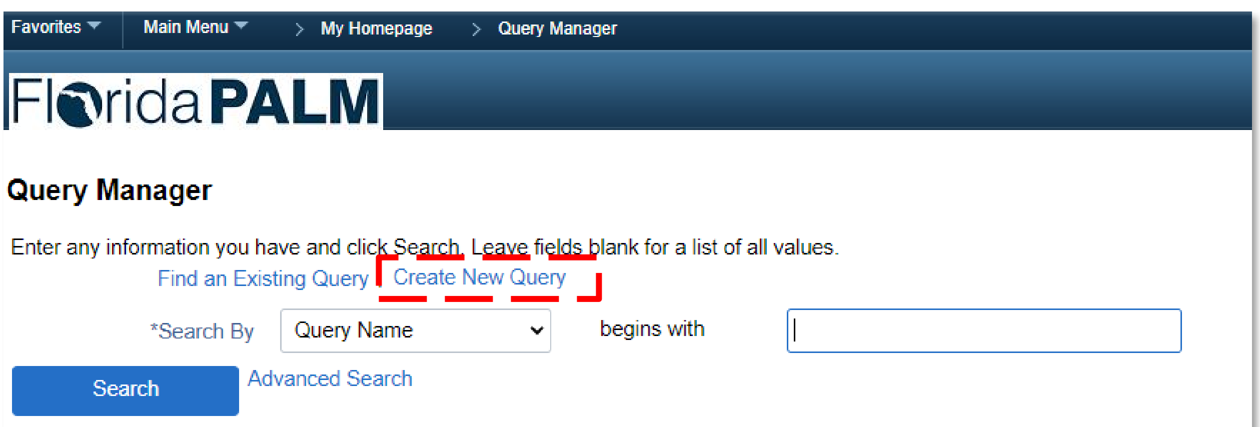

Figure 1: The Query Manager page

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.

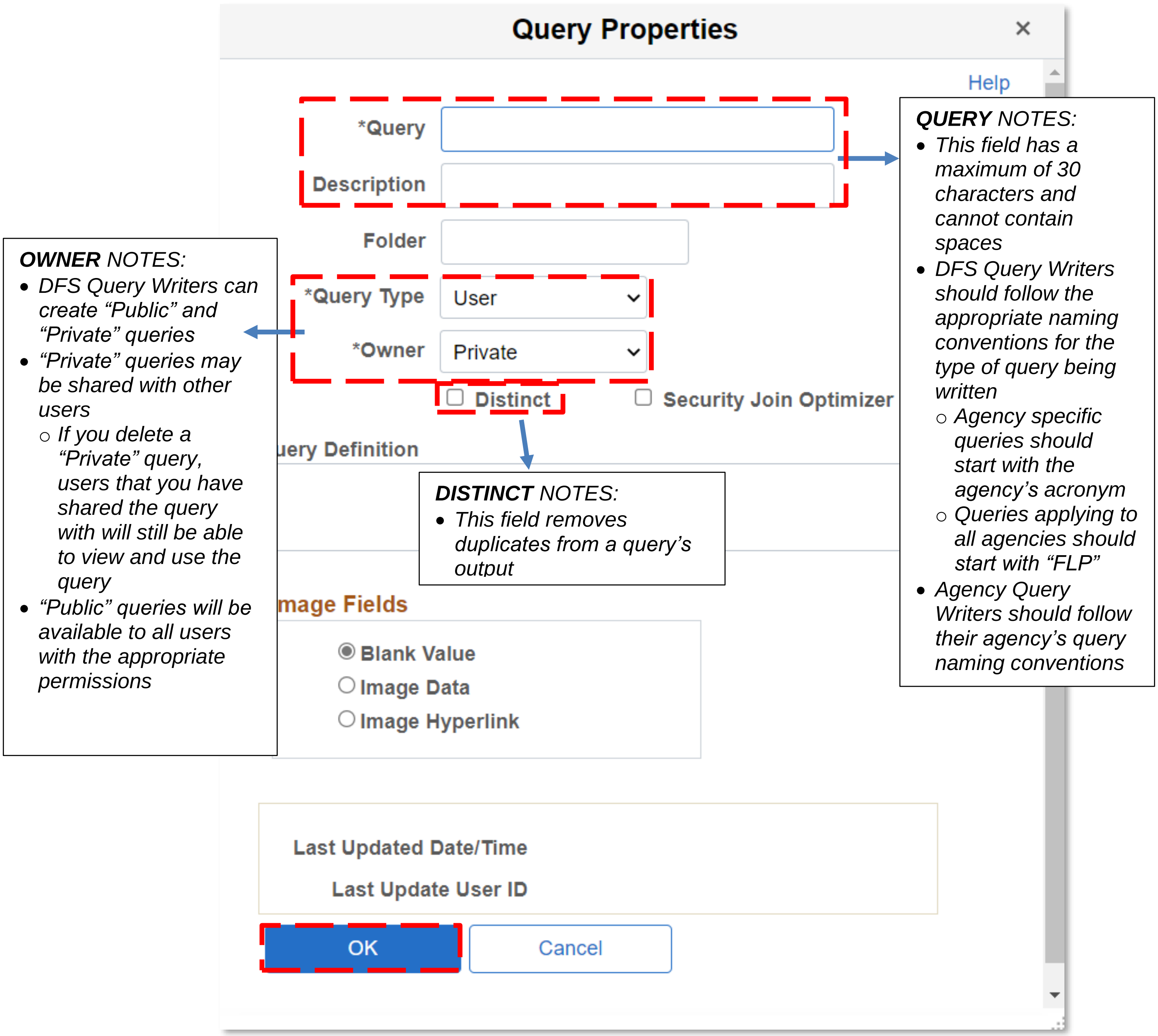

Figure 2: The Query Properties page

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.

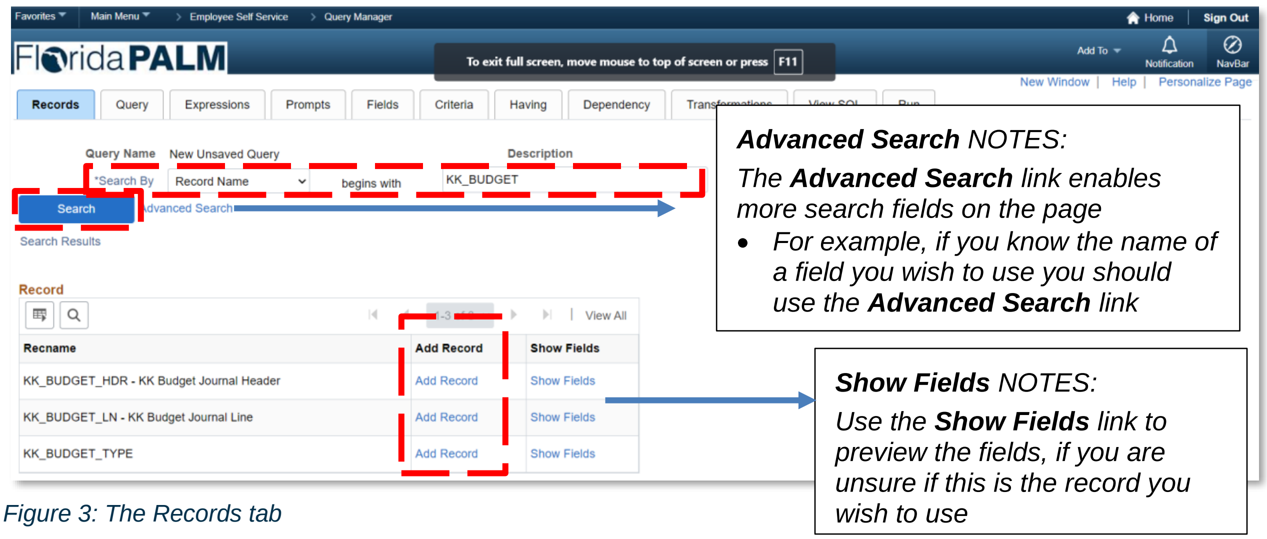

Figure 3: The Records tab

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

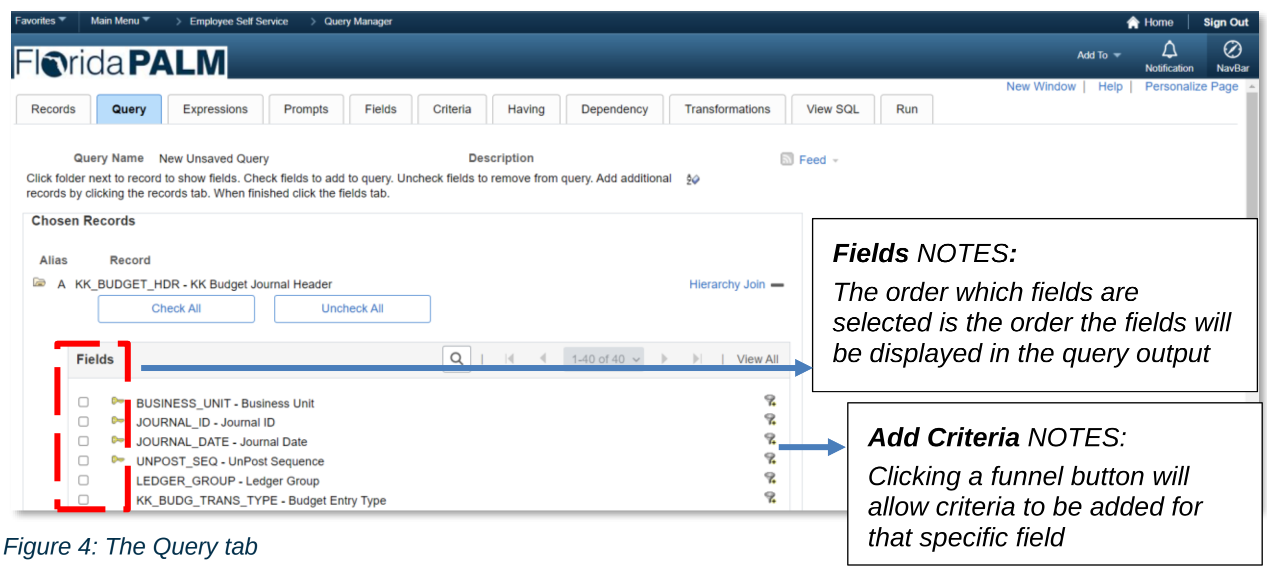

Figure 4: The Query tab

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

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.

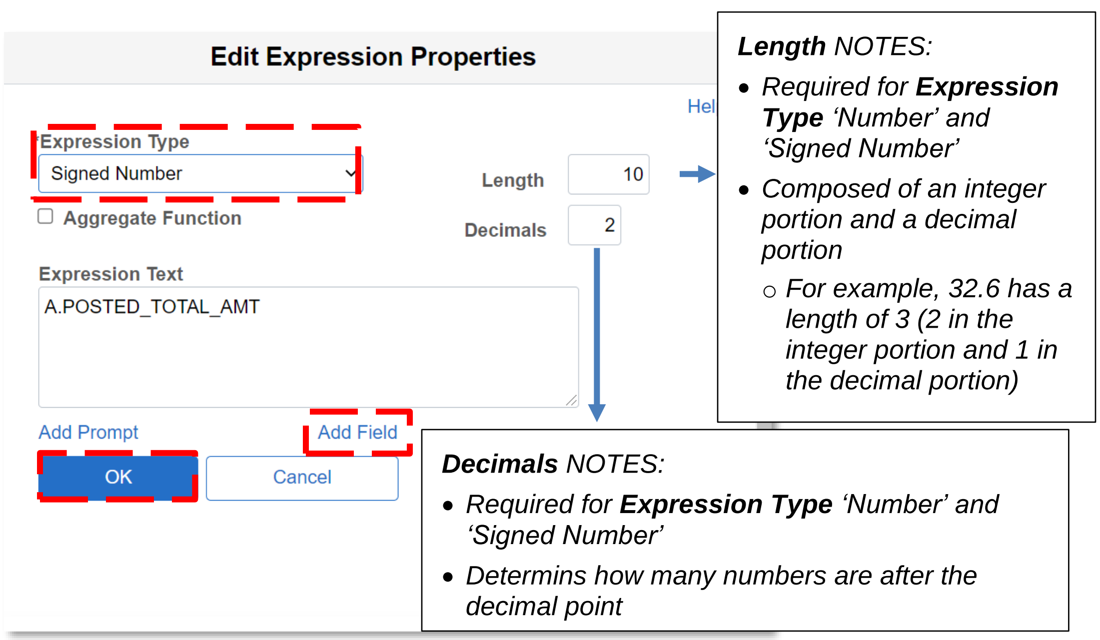

Figure 6: The Edit Expression Properties popup

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.

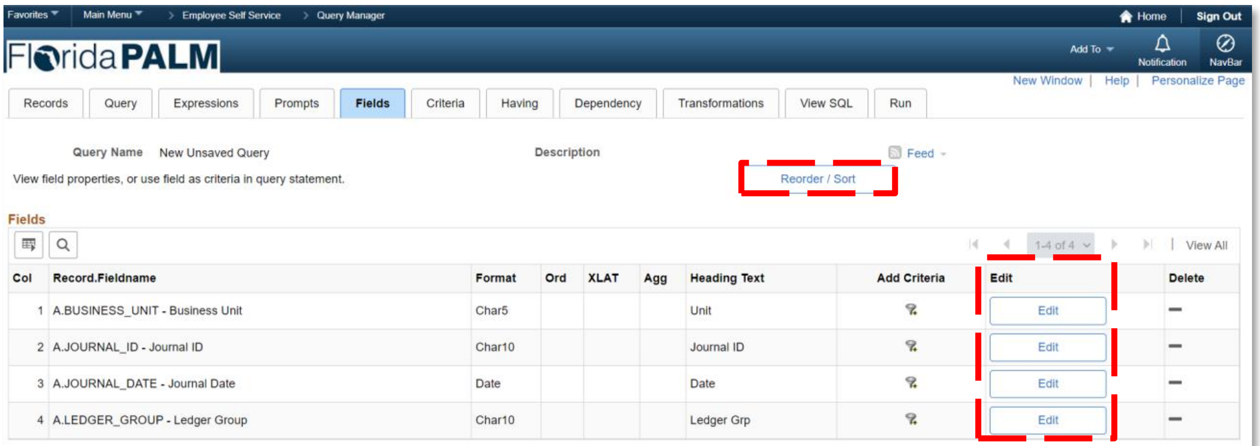

Figure 7: The Fields tab

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.

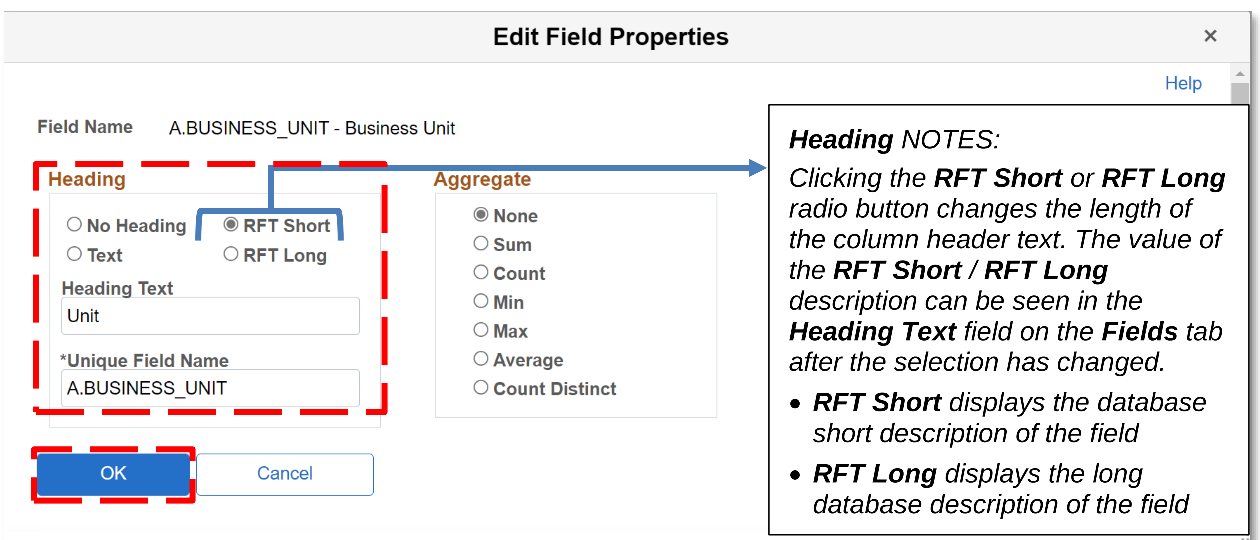

Figure 8: The Edit Field Properties page

23. On the **Edit Field Ordering** page:
    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.

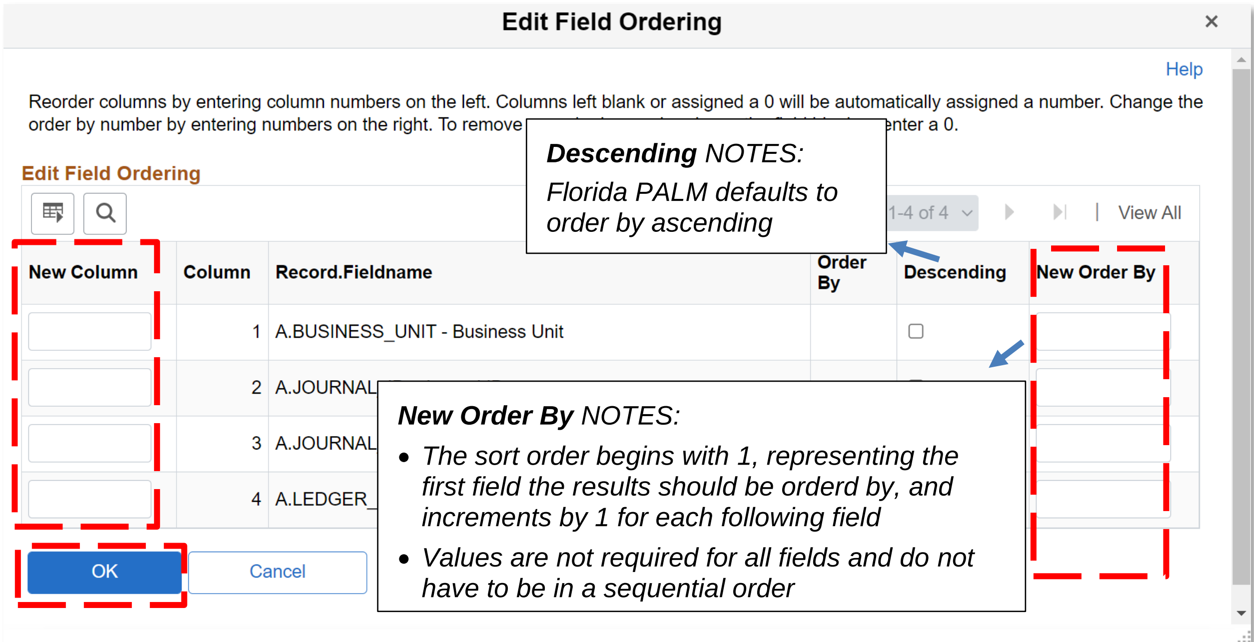

Figure 9: The Edit Field Ordering page

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

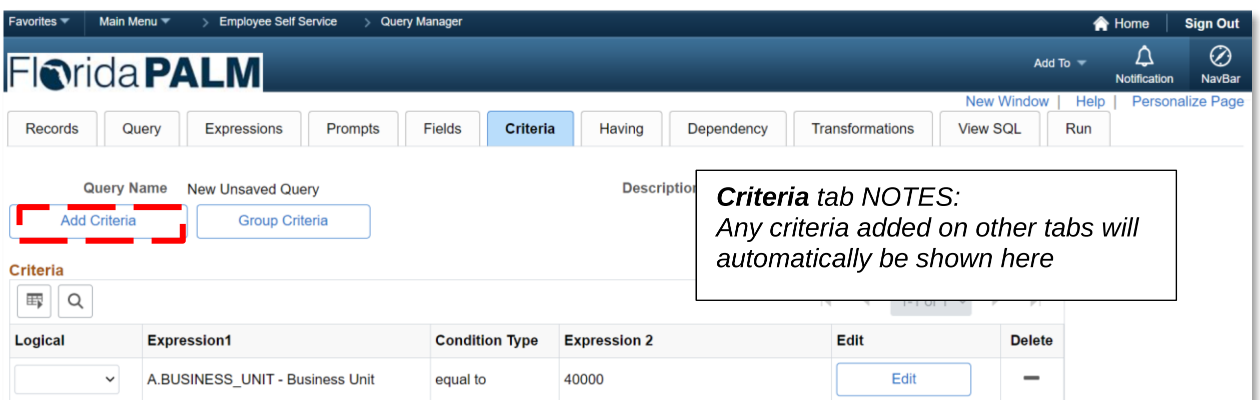

Figure 10: The Criteria tab

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

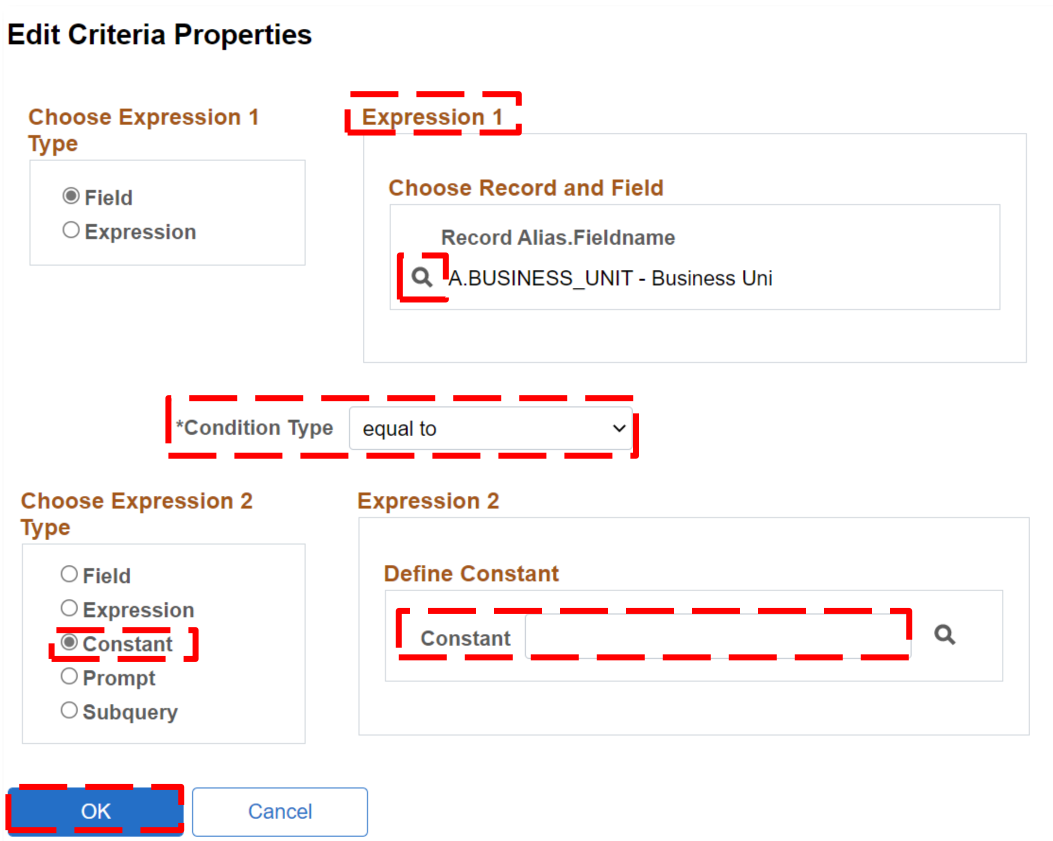

Figure 11: The Edit Criteria Properties page

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.

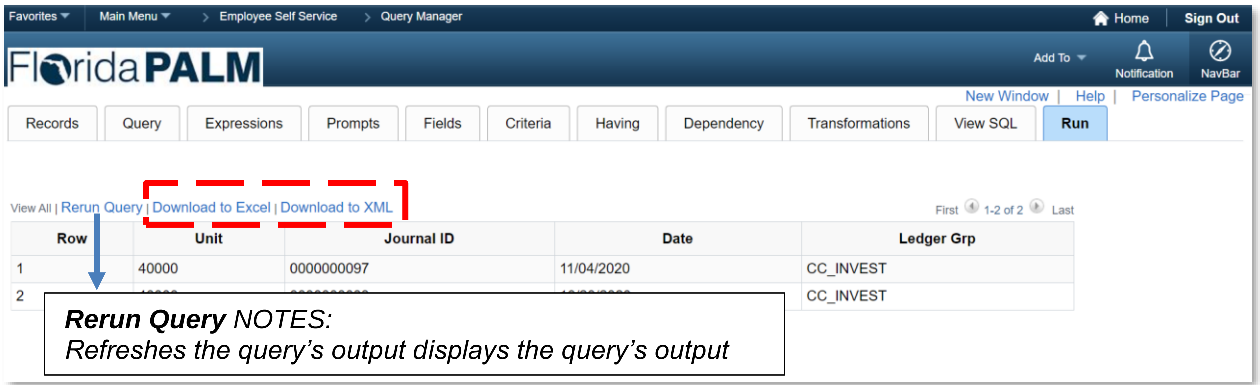

Figure 12: The Run tab

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.

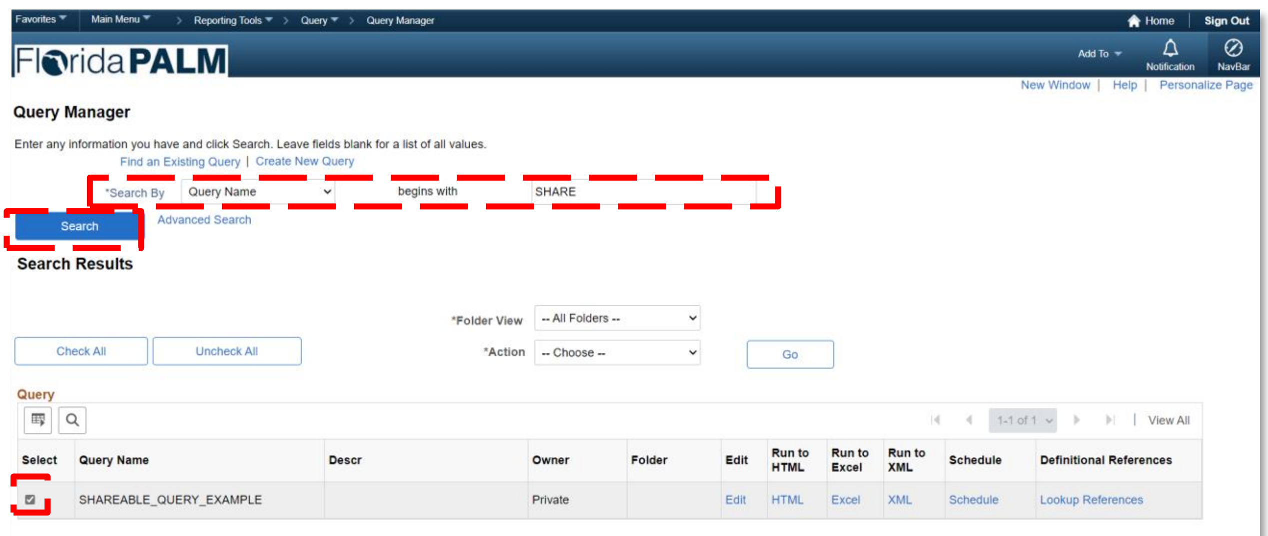

Figure 13: The Query Manager page

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

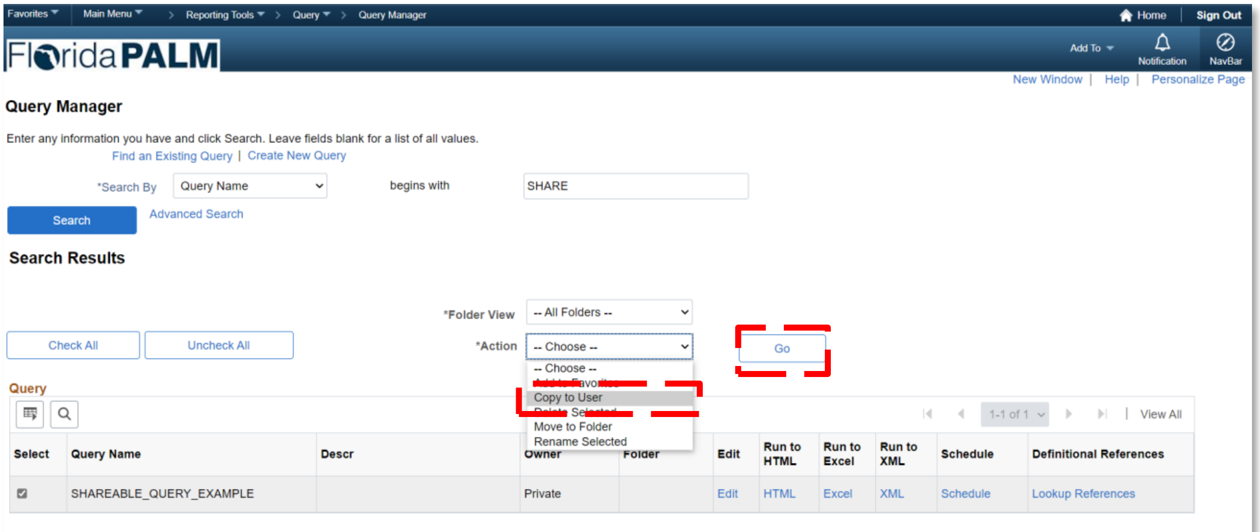

Figure 14: The Action dropdown

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

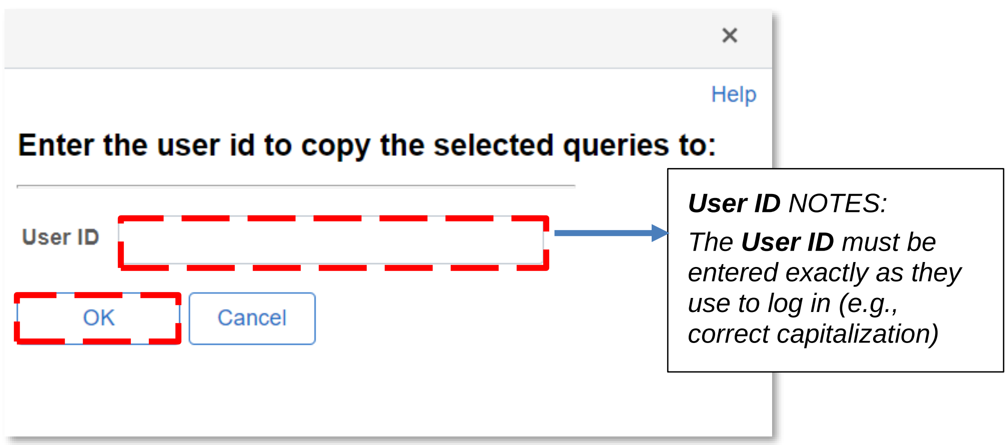

Figure 15: Selecting a user

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

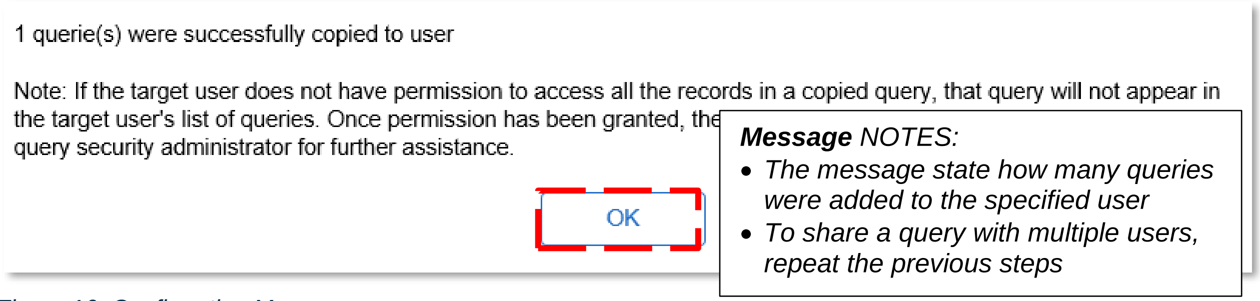

Figure 16: Confirmation Message

Still have questions?
Please contact the **[Florida PALM Solution Center](#)**.