



Retrofitting PeopleSoft Institutional Queries

PeopleSoft Version 9.2

Agenda

- ▶ Overview
- ▶ Why Queries require changing V9.2
 - Dropped Records
 - Field changes
 - Application changes
- ▶ Retro-fitting your queries
- ▶ Query Best Practices
- ▶ Documentation

Overview

- ▶ Institutional Queries can be retrofitted in the FPRE database (used for User Acceptance Testing)
 - URL: fpre.gafirst.usg.edu
 - Password: Contact Security Administrator
- ▶ Queries can be retrofitted until close of business on **February 25th**.
- ▶ Queries in FPRE are from 1 / 9 / 2015 production backup
 - ***Reminder-Query Freeze:*** Any query changes made in production after 1 / 9 will need to be made in FPRE as well so it will exist in production after upgrade.

Overview

- ▶ The queries in FPRE (UAT) as of February 25th will be migrated to the new upgraded production 9.2 environment
- ▶ Queries can be created and updated after go-live as well but working on the queries in FPRE ensures that they will be ready to go immediately upon upgrade.
- ▶ This is also a good opportunity to cleanup (rename or delete) any unused or obsolete queries.
- ▶ Recap:
 - Production Queries as of 1 / 9 migrated to FPRE
 - Queries can be updated in FPRE until 2 / 25
 - Queries in FPRE will be migrated to the upgraded Production

Why queries are changing - Dropped Records

- ▶ Why were records (tables) dropped?
 - Dropped because record (table) was a BOR modification that was eliminated as part of the upgrade.
 - PeopleSoft delivered tables were dropped.
- ▶ Each institution will receive a list of dropped records and their institutional queries that are impacted.
 - The list will include some recommendations of what record to use in place of the drop in 9.2.
 - The list only includes institutional queries that follow the standard naming convention where the query name is prefixed with the institution id.
 - You will need to look for others that do not follow the standard naming convention

Dropped Records

- ▶ Queries with dropped records will not be accessible in 9.2 (UAT or Production).
- ▶ If you have a query that includes a dropped record, we recommend recreating it in FPRE while you still have access to it in 8.9.
 - Use the existing 8.9 query to recreate it in FPRE.
 - Determine if there is a different record you should use in 9.2 in place of the dropped record.
- ▶ If your query was an institutional version of a BOR query, you may be able to use the BOR query to recreate your version

Dropped Records

- ▶ Information provided for dropped Records

8.9 RECORD	9.2 RECORD	Comments
DEPR_EXP_PD3_VW	DEPR_ALL_PD2_VW	BOR_DEPR_AM_DET_BY_PERIOD has been rewritten and renamed to BOR_AM_DEPR_DET_BY_PERIOD_BQ. The new query will be available post upgrade in Release 4.10
DISTRIB_LN_BOR		7.5 data. No longer needed, use table DISTRIB_LINE

- ▶ Information provided for queries impacted by dropped records.

BUSINESS UNIT	NAME	QUERY TYPE	QUERY	RECORD
30000	Lyman, Elbert W	PRIVATE	300_DEPR_AM_DET	DEPR_EXP_PD3_VW
30000	Lyman, Elbert W	PUBLIC	300_DEPR_AM_DET_BY_PERIOD_BQ	DEPR_EXP_PD3_VW
53000	Adams, Angel A	PRIVATE	530_BOR_DEPR_AM_DET	DEPR_EXP_PD3_VW
53000	Adams, Angel A	PUBLIC	BOR_DEPR_AM_DET_BY_PERIOD_AA	DEPR_EXP_PD3_VW
53000	Lesley A. Ferencz	PUBLIC	450_BOR_DEPR_AM_DET_BY_PERIOD	DEPR_EXP_PD3_VW
53000	Lesley A. Ferencz	PUBLIC	530_BOR_DEPR_AM_DET_BY_PERIOD	DEPR_EXP_PD3_VW
54000	Denise Colquitt	PRIVATE	540_BDC_DEPR_AM_YTD	DEPR_EXP_PD3_VW
54000	Denise Colquitt	PUBLIC	270_DEPR_AM_PD	DEPR_EXP_PD3_VW

Why queries are changing – Field Changes

- ▶ Some records had field changes
 - Fields deleted
 - Fields added
 - Fieldnames changed
- ▶ Queries with field changes will be automatically updated but updates need to be reviewed
- ▶ Some of your queries may not need modification if the field being changed is not critical information in your query.
 - ▶ Example – Some queries may be pulling all fields in a record even though some of those fields are not necessary

Field Changes

- ▶ Each institution will receive a list of changed records / fields and their institutional queries that are impacted
- ▶ Information provided for field changes

A	B	C
8.9 RECORD	8.9 FIELD	9.2 FIELD
BOR_JRNL_WF_VW	ACTION	
BOR_JRNL_WF_VW	DATETIME_STAMP	
BOR_JRNL_WF_VW	OPRID	

- ▶ Information provided for queries impacted by field changes

BUSINESS UNIT	NAME	QUERY TYPE	QRYNAME	RECNAME	FIELDNAME
28000	Wade,Celeste	PUBLIC	280_CW_JRNL_APPVR_CK	BOR_JRNL_WF_VW	ACTION
28000	Wade,Celeste	PUBLIC	280_CW_JRNL_APPVR_CK	BOR_JRNL_WF_VW	DATETIME_STAMP
28000	Wade,Celeste	PUBLIC	280_CW_JRNL_APPVR_CK	BOR_JRNL_WF_VW	OPRID
5100B	Ding,Na	PRIVATE	510_BOR_GL_JRNL_WORKFLOW_AUDIT	BOR_JRNL_WF_VW	ACTION
5100B	Ding,Na	PRIVATE	510_BOR_GL_JRNL_WORKFLOW_AUDIT	BOR_JRNL_WF_VW	DATETIME_STAMP
5100B	Ding,Na	PRIVATE	510_BOR_GL_JRNL_WORKFLOW_AUDIT	BOR_JRNL_WF_VW	OPRID
5100B	Ding,Na	PRIVATE	510_ND_BOR_GL_JRNL_WF_AUDIT	BOR_JRNL_WF_VW	ACTION
5100B	Ding,Na	PRIVATE	510_ND_BOR_GL_JRNL_WF_AUDIT	BOR_JRNL_WF_VW	DATETIME_STAMP
5100B	Ding,Na	PRIVATE	510_ND_BOR_GL_JRNL_WF_AUDIT	BOR_JRNL_WF_VW	OPRID
6900B	Morris,Tamya Gail	PUBLIC	690_DSC_JOURNAL_LOG_APPR_WF	BOR_JRNL_WF_VW	ACTION
6900B	Morris,Tamya Gail	PUBLIC	690_DSC_JOURNAL_LOG_APPR_WF	BOR_JRNL_WF_VW	DATETIME_STAMP
6900B	Morris,Tamya Gail	PUBLIC	690_DSC_JOURNAL_LOG_APPR_WF	BOR_JRNL_WF_VW	OPRID

Field Change example: BOR_JRNL_WF_VW

A	B	C
8.9 RECORD	8.9 FIELD	9.2 FIELD
BOR_JRNL_WF_VW	ACTION	
BOR_JRNL_WF_VW	DATETIME_STAMP	
BOR_JRNL_WF_VW	OPRID	

Fields for record BOR_JRNL_WF_VW - Journal workflow audit view:

Fieldname	Personalize	Find	First	1-6 of 6	Last
Key	Description				
	BUSINESS_UNIT - Business Unit				
	JOURNAL_ID - Journal ID				
	JOURNAL_DATE - Journal Date				
	OPRID - User ID				
	ACTION - Action				
	DATETIME_STAMP - DateTime Stamp				

Fields for record BOR_JRNL_WF_VW - Journal workflow audit

Fieldname	Personalize	Find	First	1-7 of 7	Last
Key	Description				
	BUSINESS_UNIT - Business Unit				
	JOURNAL_ID - Journal ID				
	JOURNAL_DATE - Journal Date				
	DESCR - Description				
	EOAWREQUESTOR_ID - Requester				
	EOAWSTEP_STATUS - Step Instance Status				
	APPROVER - Approver				

Field Change example: BOR_JRNL_WF_VW

- ▶ Query automatically updated to reflect change in fields

Records Query Expressions Prompts **Fields** Criteria Having View SQL Run

Query Name 690_DSC_JOURNAL_LOG_APPR_WF Description Journal Activity w/ Appr WF Feed

View field properties, or use field as criteria in query statement. Reorder / Sort

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.JOURNAL_ID - Journal ID	Char10	2			Journal ID	+	Edit	-
2	A.JOURNAL_DATE - Journal Date	Date	3			Date	+	Edit	-
3	A.LEDGER_GROUP - Ledger Group	Char10	1			Ledger Grp	+	Edit	-
4	A.DESCR254 - Long Description	Char254				Long Descr	+	Edit	-
5	A.SOURCE - Source	Char3				Source	+	Edit	-

Save Save As New Query

Return To Search

Message

One or more records used in this query have changed. The query has been adjusted to reflect this. (50,37) (0,0)

OK

Field Change example: BOR_JRNL_WF_VW

▶ Query in 8.9 (record B is BOR_JRNL_WF_VW)

Query Name 690_DSC_JOURNAL_LOG_APPR_WF Description Journal Activity w/ Appr WF

View field properties, or use field as criteria in query statement. Reorder / Sort

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.JOURNAL_ID - Journal ID	Char10	2			Journal ID		Edit	
2	A.JOURNAL_DATE - Journal Date	Date	3			Date		Edit	
3	A.LEDGER_GROUP - Ledger Group	Char10	1			Ledger Grp		Edit	
4	A.DESCR254 - Long Description	Char254				Long Descr		Edit	
5	A.SOURCE - Source	Char3				Source		Edit	
6	B.OPRID - User ID	Char30				User		Edit	
7	B.ACTION - Action	Char3		L		Action		Edit	
8	B.DATETIME_STAMP - DateTime Stamp	DateTm				DateTime		Edit	

▶ Query in 9.2 (deleted fields removed)

Records Query Expressions Prompts **Fields** Criteria Having View SQL Run

Query Name 690_DSC_JOURNAL_LOG_APPR_WF Description Journal Activity w/ Appr WF

View field properties, or use field as criteria in query statement. Reorder / Sort

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.JOURNAL_ID - Journal ID	Char10	2			Journal ID		Edit	
2	A.JOURNAL_DATE - Journal Date	Date	3			Date		Edit	
3	A.LEDGER_GROUP - Ledger Group	Char10	1			Ledger Grp		Edit	
4	A.DESCR254 - Long Description	Char254				Long Descr		Edit	
5	A.SOURCE - Source	Char3				Source		Edit	

Why queries are changing – Application Changes

- ▶ New PeopleSoft records/fields
 - Queries for Workflow may change because of new 9.2 workflow records (ePro & GL).
- ▶ Changes to BOR modifications
 - In Expenses, we previously had BOR fields on a PS delivered table, EX_SHEET_LINE. In 9.2, we moved those fields to a BOR record, EX_MIL_DTL_BOR
 - In Budget Prep, the Budget Period field was relabeled to Budget Ref.
- ▶ Dropped BOR tables that are no longer needed
 - There were BOR tables that housed 7.5 data that are no longer needed

Field Change due to Application Change example: Budget_Ref

- ▶ When a field is replaced, the new field is unchecked on the updated query.
- ▶ Example: Budget_Ref

A	B	C
8.9 RECORD	8.9 FIELD	9.2 FIELD
BUD_AGGDET_BOR	BUDGET_PERIOD	BUDGET_REF
BUD_FRG_UPT_BOR	BUDGET_PERIOD	BUDGET_REF
BUD_NPSA_BOR	BUDGET_PERIOD	BUDGET_REF
BUD_PSA_BOR	BUDGET_PERIOD	BUDGET_REF
BUD_PSB_BOR	BUDGET_PERIOD	BUDGET_REF
BUD_PSC_BOR	BUDGET_PERIOD	BUDGET_REF
BUD_PSC_ORIG	BUDGET_PERIOD	BUDGET_REF
BUD_PSD_BOR	BUDGET_PERIOD	BUDGET_REF

Field Change due to Application Change example: Budget_Ref

Records Query Expressions Prompts **Fields** Criteria Having View SQL Run

Query Name 240_MM_BUDPREP_AGG

Description budget prep totals

Feed

View field properties, or use field as criteria in query statement.

Reorder / Sort

Fields									
Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.BUSINESS_UNIT - Business Unit	Char5				Unit		Edit	-
2	A.LEDGER - Ledger	Char10				Ledger		Edit	-
3	A.BUDGET_PERIOD - Budget Period	Char8				Budget Period		Edit	-
4	A.POSITION_NBR - Position Number	Char8				Position		Edit	-
5	A.POSITION_POOL_ID - Position Pool ID	Char3				Pool ID		Edit	-
6	A.ACCT_CD - Account Code	Char25				Acct Code		Edit	-
7	A.FUND_CODE - Fund Code	Char5				Fund		Edit	-
8	A.DEPTID - Department	Char10				Dept		Edit	-
9	A.CLASS_FLD - Class Field	Char5				Class		Edit	-
10	A.PROGRAM_CODE - Program Code	Char5				Program		Edit	-
11	A.PROJECT_ID - Project	Char15				Project		Edit	-
12	A.ACCOUNT - Account	Char10				Account		Edit	-
13	A.SOURCE - Source	Char3				Source		Edit	-
14	A.BUD_FINAMT_BOR - Proposed Budget	SNm17.2				Proposed Budget		Edit	-
15	A.EMPLID - Empl ID	Char11				ID		Edit	-
16	A.EMPL_RCD - Empl Rcd Nbr	Num3.0				Empl Rcd#		Edit	-
17	B.DESCR - Description	Char30				Descr		Edit	-

Field Change due to Application Change example: Budget_Ref

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Query Name 240_MM_BUDPREP_AGG Description budget prep totals

Click folder next to record to show fields. Check fields to add to query. Uncheck fields to remove from query. Add additional records by clicking the records tab. When finished click the fields tab.

Chosen Records

Alias Record

A BUD_AGGDET_BOR - Budget Prep Aggregate Details Hierarchy Join [-]

Check All Uncheck All

Fields Find | View All First 1-22 of 22 Last

<input checked="" type="checkbox"/>		BUSINESS_UNIT - Business Unit	
<input checked="" type="checkbox"/>		LEDGER - Ledger	
<input type="checkbox"/>		BUDGET_REF - Budget Reference	
<input checked="" type="checkbox"/>		POSITION_NBR - Position Number	
<input checked="" type="checkbox"/>		POSITION_POOL_ID - Position Pool ID	
<input checked="" type="checkbox"/>		ACCT_CD - Account Code	
<input checked="" type="checkbox"/>		FUND_CODE - Fund Code	
<input checked="" type="checkbox"/>		DEPTID - Department	
<input checked="" type="checkbox"/>		CLASS_FLD - Class Field	
<input checked="" type="checkbox"/>		PROGRAM_CODE - Program Code	
<input checked="" type="checkbox"/>		PROJECT_ID - Project	
<input checked="" type="checkbox"/>		ACCOUNT - Account	
<input checked="" type="checkbox"/>		SOURCE - Source	
<input checked="" type="checkbox"/>		BUD_FINAMT_BOR - Proposed Budget	
<input type="checkbox"/>		BUD_FUND_CODE2_BOR - Fund Code	
<input type="checkbox"/>		BUD_DEPTID2_BOR - Department	
<input type="checkbox"/>		BUD_CLASS_FLD2_BOR - Class Field	
<input type="checkbox"/>		BUD_PROGRAM2_BOR - Program Code	
<input type="checkbox"/>		BUD_PROJECTID2_BOR - Project/Grant	
<input type="checkbox"/>		BUD_ACCOUNT2_BOR - Account	
<input checked="" type="checkbox"/>		EMPLID - Empl ID	
<input checked="" type="checkbox"/>		EMPL_RCD - Empl Rcd Nbr	

Join DEPT_TBL - Departments

Retrofitting your queries

- ▶ Queries with dropped records will need to be rewritten using new recommended records
- ▶ Queries with field changes will need to be evaluated to see if they still provide the data needed
- ▶ All institutional queries should be evaluated at some point to ensure that they are needed and are providing the appropriate data

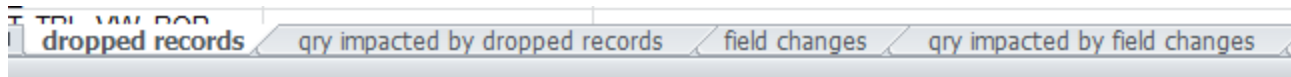
Query Best Practices

- ▶ Query name should always start with your three digit campus code (first three digits of your Business Unit) and your initials.
 - Do not name a query that you edit or create with the prefix **BOR** since all delivered model queries use the **BOR_XXX** naming convention.
- ▶ If you rename a query, both the old and new query will exist. You should delete the query with the incorrect name.
- ▶ Deleting queries:
 - Only the person who creates a private query can delete it.
 - Anyone with public query access can delete a public query.

Documentation

▶ Documentation

- Query Best Practices document
- Query Change Spreadsheet
 - Each institution will receive a spreadsheet with their impacted queries
 - Four tabs:
 - Dropped Records
 - Queries impacted by dropped records
 - Field Changes
 - Queries impacted by field changes





Questions?