



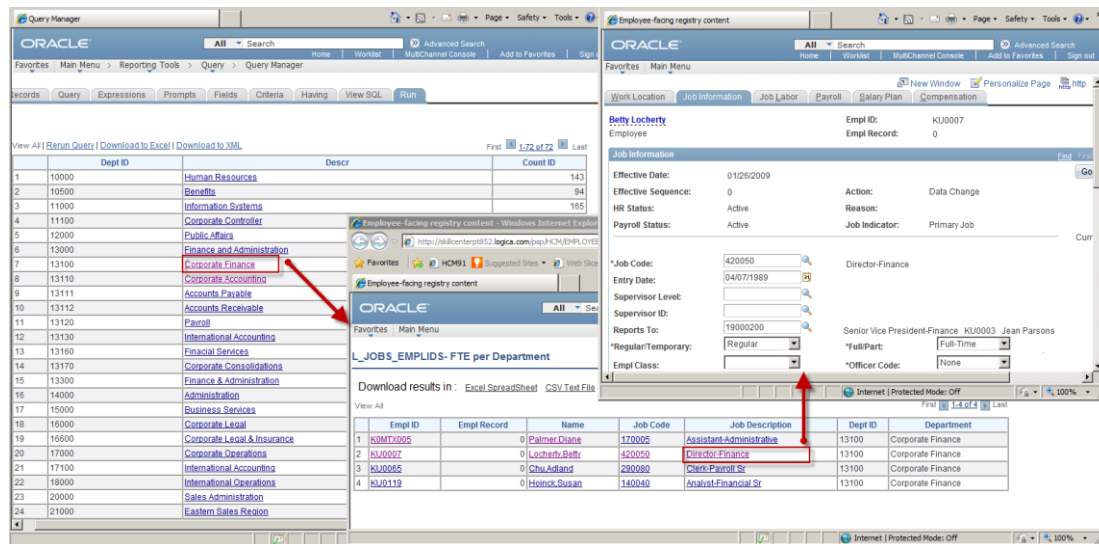
DESDE
1989

PeopleSoft
Conhecimento

Extending PSQuery productivity with Drilling URL



1. Extending PSQuery productivity with Drilling URL



PSQuery is an online PeopleTools functionality heavily used by business analysts and key users to gain information from the PeopleSoft application without the need of development or database SQL knowledge. The biggest con of PSQuery is that you end up with one static list of data, which is usually exported to Excel for further enhancement and analysis.

From PeopleTools 8.50, you now have the ability to create more in-depth analyses and productivity using drilling URLs.

When you build a query using Query Manager, you can define drilling URLs that are associated with this query using the expression option. These settings are saved into the database, along with prompt, criteria, and so on, as part of the metadata for this query. When you execute this query through Query Manager or Query Viewer, the query results page shows results as links, which you can click to be redirected to a different page in a new browser. You can create URLs for:

- Other PSQuery, for more in-depth information about a subject, actual drilldown functionality

- PIA Component, direct link to components where the keys for the search page of the component are extracted from the selected columns in the query
- External URL, non PeopleSoft URLs, for example Vendor sites
- Attachment URL, direct link to an attachment that is stored in the database or file system
- Free Format URL, any type of URL you want to construct, can be used for example to deep link to other non-PeopleSoft applications

So how does one create a drilling URL?

You start off by creating an ordinary query as you would usually do. For this example I created a query on table JOB. I then joined JOB with table NAMES, to retrieve the name of the employee and joined JOB with tables DEPT_TBL and JOBCODE_TBL to retrieve the descriptions of the jobcode and the department. I selected the following columns:

- JOB.EMPLID
- JOB.EMPL_RCD
- NAMES.NAME
- JOB.JOBCODE
- JOBCODE_TBL.DESCR
- JOB.DEPT_ID
- DEPT_TBL.DESCR

Now lets create a drilling URL to Component JOB_DATA and map this URL to the JOBCODE_TBL.DESCR field, so that when we click on the Jobcode description, we will be redirected to the JOB_DATA component for the employee record showing in the query.

You start off by selecting tab Expression and click on the button Add Expression and from the dropdown menu you select Drilling URL.

Edit Expression Properties

***Expression Type**

Drilling URL

Character

Date

Datetime

Drilling URL

Long Character

Number

Signed Number

Time

[Query URL](#) [Component URL](#)

[External URL](#) [Attachment URL](#)

[Free Form URL](#)

OK Cancel

Now select link Component URL.

Select a Component

Portal Name

Node Name

Content Reference

*Menu Name

*Market

*Component

Page

☐ Use psc

[Add Content Reference Link](#)

Search Keys Select Field Map Columns

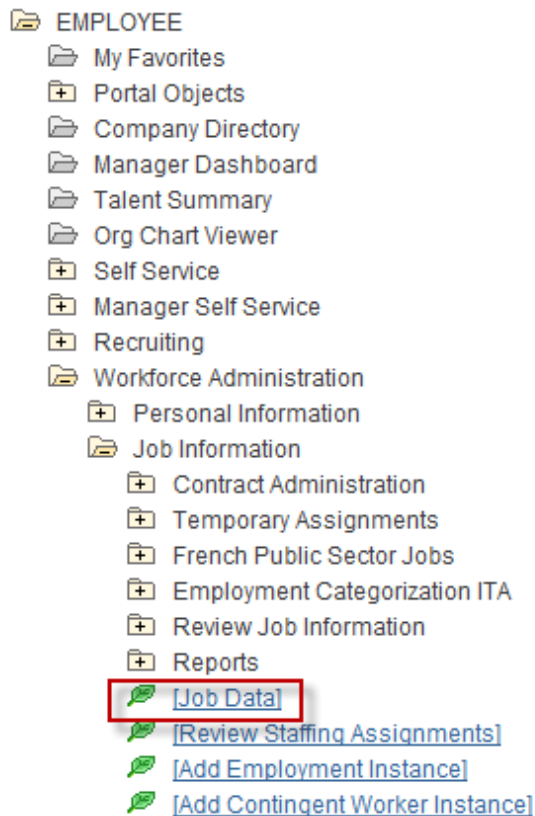
Use the link Add Content Reference Link, to select the component where we want the drilling URL to redirect to. After you select the Add Content Reference Link you will be presented with a tree of the PeopleSoft menu content reference. From the tree select content reference Job Data.

Select a Content Reference or Content Reference Link

Click the registry name and pick a content reference or content reference link.

Click "Return" to exit and not create a link.

Left | Right



Once you select the content reference you will go back to the previous screen and there you will see that the fields that will produce the link to the component are now filled in, except the Page field is not filled in. Use the prompt icon to select which page you want the drilling URL to navigate to.

Portal Name
 Node Name ☐ Use psc
 Content Reference [Add Content Reference Link](#)
 *Menu Name
 *Market
 *Component
 Page

URL Keys

Selection Flag	Field Name	Key Value	Field Lookup
<input type="checkbox"/>	EMPLID	A.EMPLID	<input type="button" value="+"/> <input type="button" value="-"/>
<input checked="" type="checkbox"/>	EMPL_RCD	A.EMPL_RCD	<input type="button" value="+"/> <input type="button" value="-"/>

Map URL to Query Columns

Selection Flag	Unique Field Name
<input type="checkbox"/>	A.EMPL_RCD
<input checked="" type="checkbox"/>	B.DESCR
<input type="checkbox"/>	A.DEPTID
<input type="checkbox"/>	C.DESCR

After this, click on the button Search Keys. This will bring up a grid with the search keys for the component. Select the query result fields corresponding with the component search keys. You can also choose to fill in a constant value instead of the query result fields.

Finally click on the Map Columns button to change the query result field JOBCODE.DESCR to the drilling URL, otherwise you can add the drilling URL as a separate result field in the query, but personally I don't find this so appealing.

Now do the same trick to create a drilling URL to component PERSONAL_DATA and map this to EMPLID and NAME and create a drilling URL to component JOB_CODE_TBL and map this to query result field JOB.JOBCODE.

You will now end up with a query with four result fields presented as direct links to PeopleSoft components corresponding to the query results.

	Empl ID	Empl Record	Name	Job Code	Job Description	Dept ID	Department
1	K0MTX005	0	Palmer,Diane	170005	Assistant-Administrative	13100	Corporate Finance
2	KU0007	0	Locherty,Betty	420050	Director-Finance	13100	Corporate Finance
3	KU0065	0	Zhu,Adland	290080	Clerk-Payroll Sr	13100	Corporate Finance
4	KU0119		Hoinck,Susan	140040	Analyst-Financial Sr	13100	Corporate Finance

Link to PERSONAL_DATA

Link to JOBCODE_TBL

Link to JOB_DATA

Now lets take it a level higher.

I would like to see a list of departments with the headcount and when a select a department I would like to see the employees of that department (query created above).

First create prompts SETID and DEPTID for the query created above and add these prompt the criteria list.

Records

Query

Expressions

Prompts

Fields

Criteria

Having

View SQL

Run

Query Name L_JOBS_EMPLIDS

Description FTE per Department

Add Criteria

Group Criteria

Reorder Criteria

Criteria

Personalize | Find | 1-8 of 8 Last

Logical

Expression1

Condition Type

Expression 2

Edit

Delete

AND

A.EFFDT - Effective Date

Eff Date <=

Current Date (EffSeq = Last)

Edit

AND

B.EFFDT - Effective Date

Eff Date <=

A.EFFDT - Effective Date

Edit

AND

C.EFFDT - Effective Date

Eff Date <=

A.EFFDT - Effective Date

Edit

AND

A.EMPLID - Empl ID

equal to

D.EMPLID - Empl ID

Edit

AND

D.EFFDT - Effective Date

Eff Date <=

Current Date

Edit

AND

A.SETID_DEPT - Department Set ID

equal to

:2

Edit

AND

A.DEPTID - Department

equal to

:1

Edit

AND

A.EMPL_STATUS - Payroll Status

equal to

A

Edit

Now create the high level query with the list of departments. I created a query on JOB and DEPT_TBL and selected fields:

- JOB.DEPTID
- DEPT_TBL.DESCR
- JOB.EMPLID (count)

Query Name

L_DEPT_FTE

Description

Department FTE

Feed


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


Reorder / Sort


Fields										Personalize	Find	View All			First	1-3 of 3	Last
Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete								
1	A.DEPTID - Department	Char10				Dept ID		<div>Edit</div>	<div>—</div>								
2	B.DESCR - Description	Char30				Descr		<div>Edit</div>	<div>—</div>								
3	A.EMPLID - Empl ID	Char11			Count	Count ID		<div>Edit</div>	<div>—</div>								

Now select tab Expression and create a Drilling URL of type Query and select the Job details query created prior.


Select a Query



Portal Name 


Node Name  ☐ Use psc

Query Name 

*Format



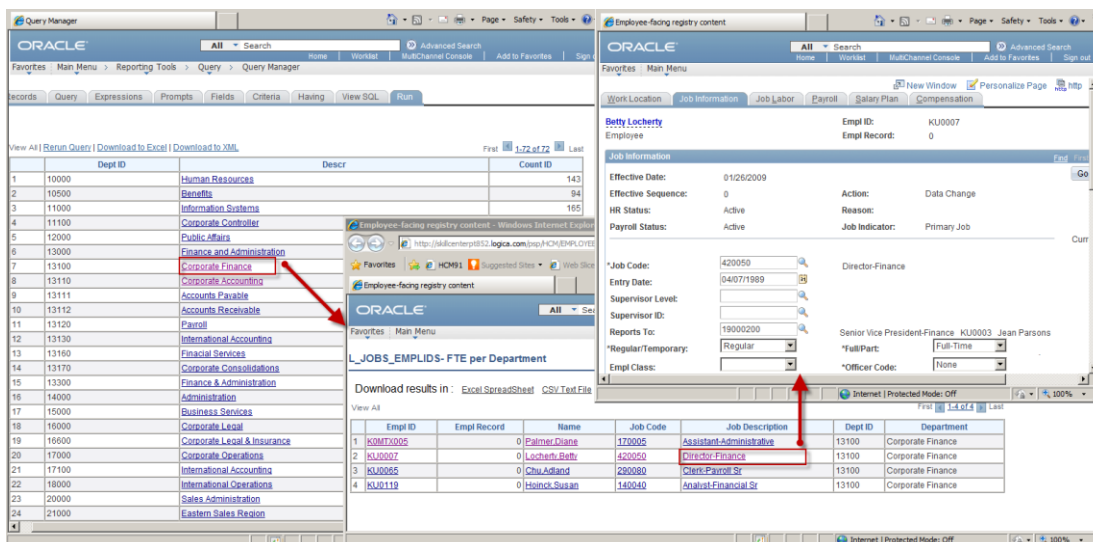
URL Keys						
Selection Flag	Key Field Name	Unique Prompt Name	Key Value	Field Lookup		
<input type="checkbox"/>	DEPTID	BIND1	A.DEPTID		<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="checkbox"/>	SETID	BIND2	SHARE		<input type="button" value="+"/>	<input type="button" value="-"/>



Map URL to Query Columns	
Selection Flag	Unique Field Name
<input type="checkbox"/>	A.DEPTID
<input checked="" type="checkbox"/>	B.DESCR
<input type="checkbox"/>	A.EMPLID

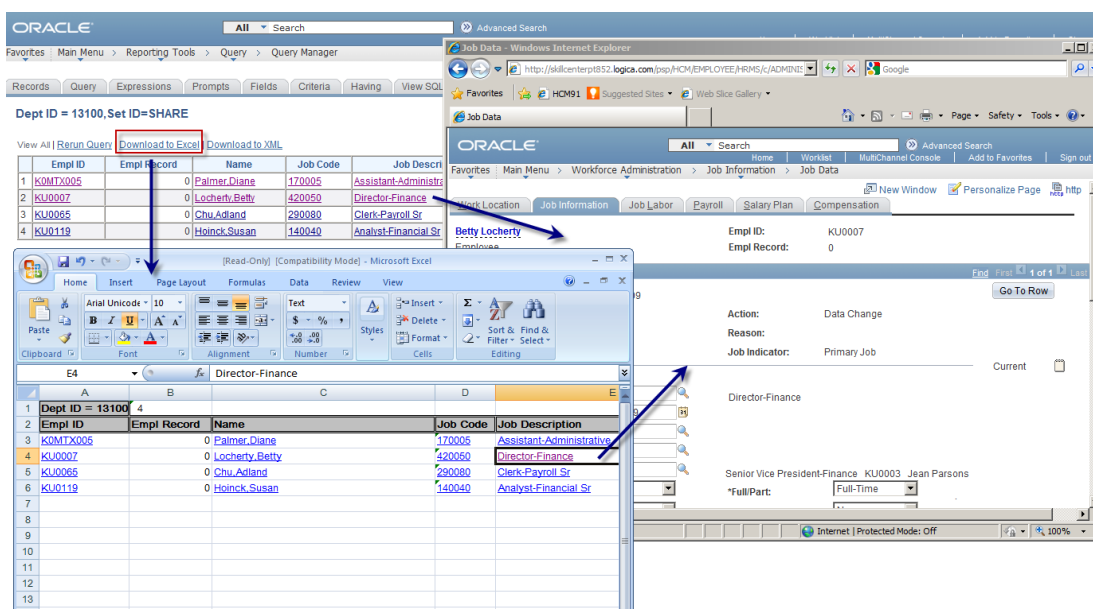
After clicking on Prompt Keys select the query result fields from this query which will be used to fill the prompt values of the lower query. Notice that in the above screen I chose to have DEPTID bind to the query result field and have SETID bind to constant value SHARE. Finally map the drilling URL to query result field DEPT_TBL.DESCR.

You end up with:



Without any coding and all done with online PeopleSoft pages (in a few clicks!) you have created a high level query with a list of headcount per department with a drill down possibly to further detail on the employees residing on these departments and from here a more in depth deep link to the individual transaction data.

Another great feature of PeopleSoft Query is the ability to export the query results to an Excel spreadsheet. When the query contains drilling URLs these are also exported to Excel as hyperlinks. This results in a spreadsheet with deep links to PeopleSoft transaction data.



Imagine the possibilities without the need of customizations or development ...