

Query Maintenance Best Practices

It is important to follow Query Maintenance Best Practices to ensure the queries you need remain available to you and are in good working order. This document discusses best practices for both public and private queries created by your institution.

Public vs. Private Queries

The following are key points to remember when working with queries:

- Anyone can use a public query.
- Only the person who created a private query can use it or delete it.
- You should never make changes to a public query you did not create. If you want to change a public query, save a copy of the query and make the changes to your copy of the query.
- When you create a public query, consider creating a private copy with a unique name for yourself (see the next section for naming conventions). Then, if someone mistakenly changes or deletes a public query you created, you will still have a copy of the original.
- When you search for queries from the Query Manager Search page, PeopleSoft will list the private queries you created first that correspond with your search. Only you will see these. Public queries are listed after private queries.
- If you run a public query and do not receive results, it is possible you may not have authorization to some of the records used in that query.

Naming Your Queries

Whether you are making a copy of a public query (saving as a private query) or creating a new query, the query name should always start with your three digit campus code (first three digits of your Business Unit), include your initials and then the name of the query. For example, if Jackie Daily at Business Unit 98000 wants to write a query to find outstanding checks, the query name might be 980_JD_OUTSTANDING_CHECKS.

Note: 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. This will minimize confusion for other users when searching for BOR delivered queries versus institution created queries.

In the event you determine you have incorrectly named your query, you can update the query name.

Use the following steps to change the name of a saved query:

1. Navigate to Query Manager: Main Menu > Reporting Tools > Query > Query Manager
2. From Query Manager, search for the query and select the checkbox beside the query name.

- Click the **Edit** link next to the selected query.

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](#)

Search Results

*Folder View

*Action

Query	Personalize	Find	View All	Print	First	1 of 1	Last		
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input checked="" type="checkbox"/>	98_HD_AM_ASSET_LISTING	Asset Listing for Auditors	Private		Edit	HTML	Excel	XML	Schedule

- Click the **Properties** link at the bottom of the page:

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

Query Name 98_HD_AM_ASSET_LISTING Description Asset Listing for Auditors

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

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.BUSINESS_UNIT - Business Unit	Char5				Unit		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
2	A.ASSET_ID - Asset Identification	Char12	1			Asset ID		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
3	A.TAG_NUMBER - Tag Number	Char12				Tag Number		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
4	A.DESCR - Description	Char30				Descr		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
5	A.ACQUISITION_CD - Acquisition Code	Char1		N		Acq Code		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
6	A.ACQUISITION_DT - Acquisition Date	Date				Acq Date		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
7	A.PROFILE_ID - Asset Profile ID	Char10				Profile ID		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
8	A.SERIAL_ID - Serial ID	Char20				Serial ID		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
9	B.CATEGORY - Asset Category	Char5				Category		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
10	B.COST - Total Cost	SNm25.3				Cost		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
11	B.DEPTID - Department	Char10				Dept		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>
12	C.LOCATION - Location Code	Char10				Location		<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

- On the Query Properties page, update the query name to the correct naming convention and click **OK**.

- Click **Save** to retain the updated query name. Once you have saved your updated query name, return to Query Manager and search for your query. Confirm your updated query is returned within your search.

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input type="checkbox"/>	980_HD_AM_ASSET_LISTING	Asset Listing for Auditors	Private		Edit	HTML	Excel	XML	Schedule

Note: The original incorrectly named query still exists and will need to be deleted. Follow the instructions below to delete the original query.

Deleting Queries

Institution-developed queries (both public and private) should be evaluated from time to time to determine if they are still needed. Queries that are no longer needed should be deleted.

Who can delete a private query?

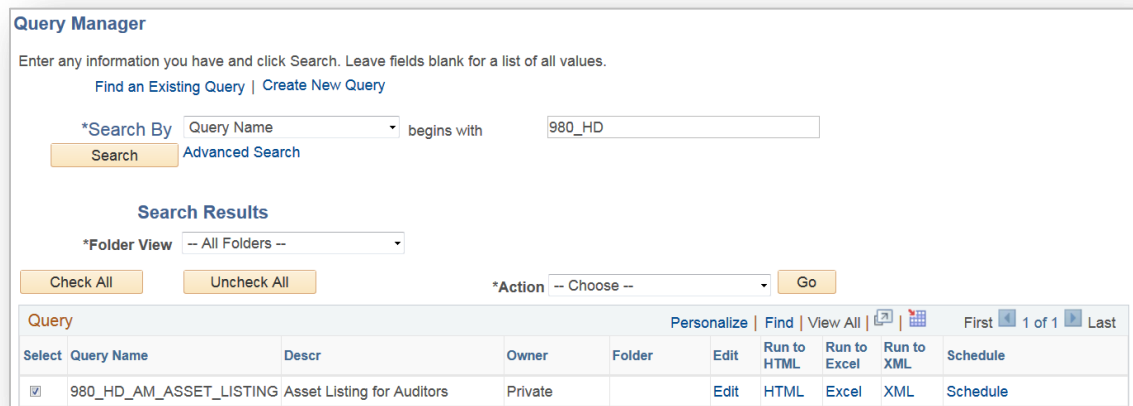
Only the person who created the private query can delete it.

Who can delete a public query?

Anyone can delete an institution-developed public query.

Use the following steps to delete queries:

1. From Query Manager or Query Viewer, search for the query and select the checkbox beside the query name. You may want to search for queries that start with your Business Unit and your initials. You can select one or multiple queries to delete.



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

Search Results

*Folder View

*Action

Query	Personalize	Find	View All	First	1 of 1	Last			
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input checked="" type="checkbox"/>	980_HD_AM_ASSET_LISTING	Asset Listing for Auditors	Private		Edit	HTML	Excel	XML	Schedule

- From the **Action** dropdown menu, select **Delete Selected** and click **Go**.

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

Search Results

*Folder View

***Action**

Query	Personalize	Find	View All	First	1 of 1	Last
<input checked="" type="checkbox"/>	<input type="button" value="Edit"/>	<input type="button" value="Run to HTML"/>	<input type="button" value="Run to Excel"/>	<input type="button" value="Run to XML"/>	<input type="button" value="Schedule"/>	
980_HD_AM_ASSET_LISTING	Asset Listing for Auditors	Private				

- You will receive a message asking to confirm the deletion of selected queries. Click **Yes** to delete.

Message

Confirm the permanent deletion of all selected queries? (139,191)