Saving a Predefined Query to Edit
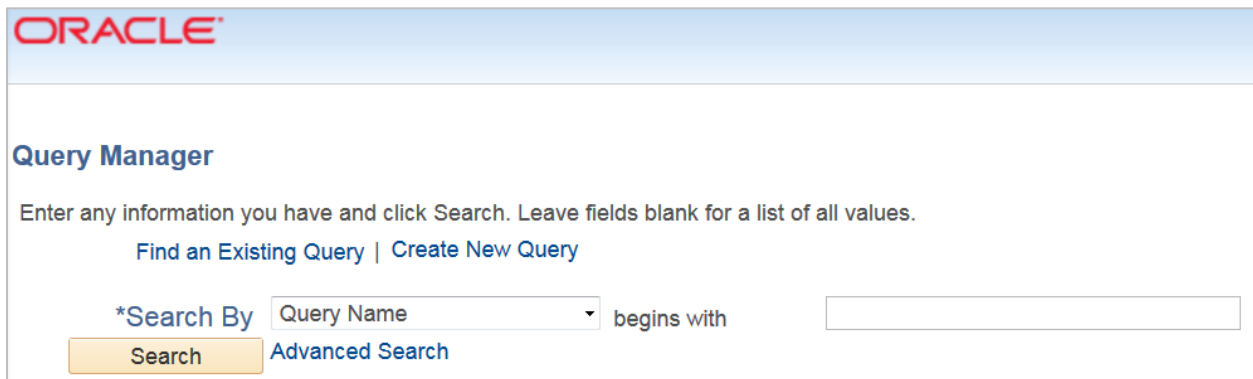
PeopleSoft Financials 9.2 Web Query is a graphical tool that allows you to easily retrieve specific data from the PeopleSoft system. The data is retrieved by running predefined or custom queries.

If you would like to edit a predefined query, you will first need to save a personal copy of the query. The following steps will guide you through saving a query in Query Manager.

Query Manager

Navigation: **Main Menu > Reporting Tools > Query > Query Manager**

Saving a Query

In order to edit a predefined query, you must be in Query Manager. Remember, you should never edit a query you did not create. The first step in editing a predefined query is to save a personal copy of the query. You will then edit the copy of the saved query and not the actual query itself.

Search for and select the query you would like to edit. The following search results are displayed after searching for **BOR_AM_ASSET**.

Select the desired query to save by clicking the **Edit** link for that query. The system will take you to pages where you can see how the query was built. You may receive a message stating the query is read-only. However, even if you do not receive this message, you should not make any changes to a query that another person created. Your first step is to save a new copy of the query for yourself.

To do this, click the **Save As** link on the query editing page. This link is at the lower left of the page. You can now save a personal copy of this predefined query.
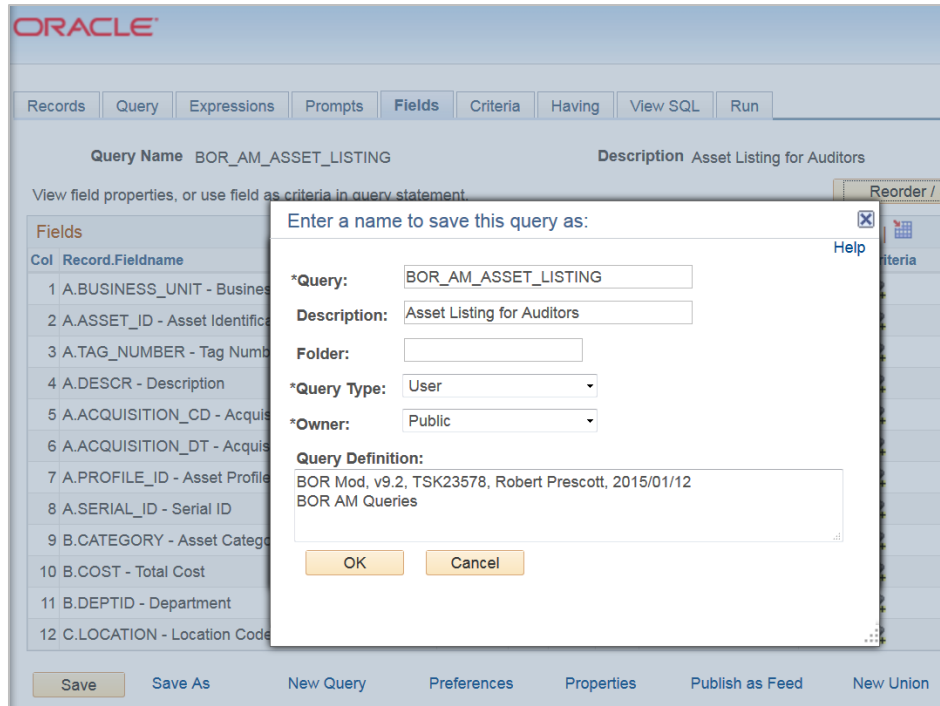
First, change the name of the query. You may want to replace BOR with your business unit and your initials in the query name. Also, you may want to make the query private so you're the only one who can see and run it.
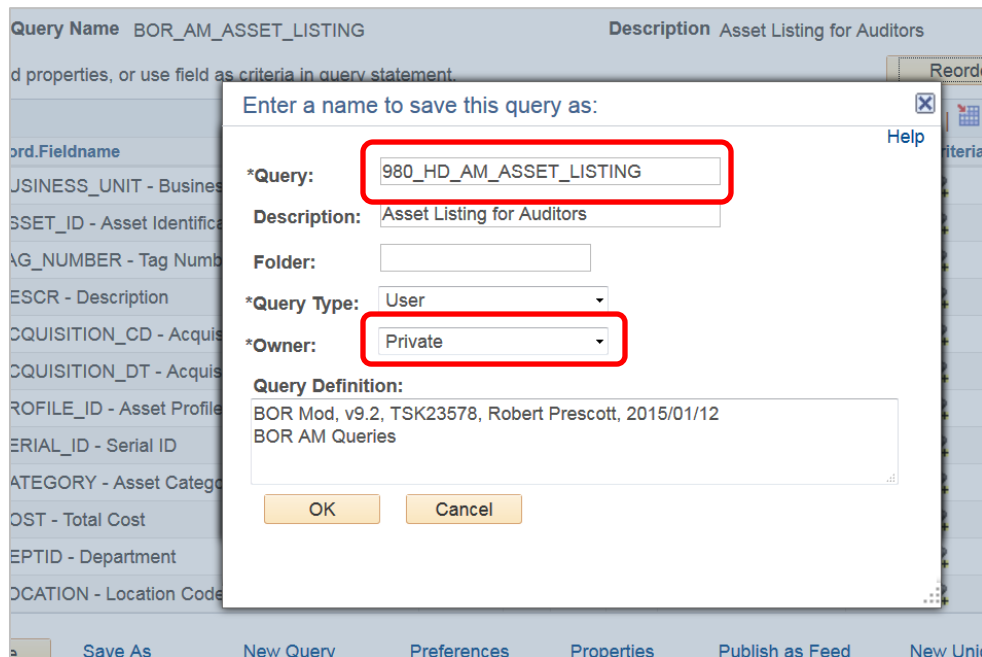
You can always save a public copy of your edited query later. When finished customizing, click **OK**.

You will notice the query name has changed. You now have a saved copy of the original query that you can now edit.

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

Query Name 980_HD_AM_ASSET_LISTING   **Description** Asset Listing for Auditors   Feed

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

Reorder / Sort

Fields   Personalize | Find | View All | First 1-12 of 12 Last

Save   Save As   New Query   Preferences   Properties   Publish as Feed   New Union

If you return to Query Manager and search for the query you just saved, you'll notice it is now private. The personal copy of this query you just saved is now ready for you to edit.

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 Query Name begins with 980_HD_AM

Search   Advanced Search

Search Results

*Folder View -- All Folders --

Check All   Uncheck All   *Action -- Choose --   Go

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
☐	980_HD_AM_ASSET_LISTING	Asset Listing for Auditors	Private		Edit	HTML	Excel	XML	Schedule

Query   Personalize | Find | View All | First 1 of 1 Last

Also, the original predefined query can be found when searching in Query Manager.