

People 5.2 ft

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

ORACLE [®]			
Query Manager			
Enter any information yo	ou have and click Search. Le	ave fields blank for a list of	all values.
Find an Exis	ting Query Create New Qu	iery	
*Search By Search	Query Name Advanced Search	 begins with 	

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**.



Quer	y Manager											
Enter	Enter any information you have and click Search. Leave fields blank for a list of all values.											
	Find an Exist	ting Query Create Ne	w Querv	an raidoo.								
	*Search By	Query Name	 begins with 	BOR_AM_	ASSET							
	Search	Advanced Search										
	Search Results											
	*Folder View	All Folders	•									
	Check All	Uncheck All	*Actio	on Choose		•	Go					
Que	ery				Personal	ize Find	d View A	u 🖾	۲ F	First 📧 1-5 of 5 🕨 Last		
Selec	ct Query Name		Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule		
	BOR_AM_ASSE	T_AP_TO_AM_LOAD	Assets w/ Recv ID to load	Public		Edit	HTML	Excel	XML	Schedule		
	BOR_AM_ASSE	T_LISTING	Asset Listing for Auditors	Public		Edit	HTML	Excel	XML	Schedule		
	BOR_AM_ASSE	T_LOCATION	ASSET_LOCATION count	Public		Edit	HTML	Excel	XML	Schedule		
	BOR_AM_ASSE	T_NBV_TBL	ASSET_NBV_TBL summed	Public		Edit	HTML	Excel	XML	Schedule		
	BOR_AM_ASSE	T_NO_TAG_NUMBER	Assets Missing Tag Numbers	Public		Edit	HTML	Excel	XML	Schedule		

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.

							Home	Worklist
Records Query Expressions Prompts Fi	elds Criter	ia	Having	g \	view SQL Run			New
Query Name BOR_AM_ASSET_LISTING				Desc	ription Asset Listing for	or Auditors	S Food	_
View field properties, or use field as criteria in query st	atement.					Reorder /	Sort	Ť
Fields					Personalize Find V	′iew All 💷 🛗	First 🚺 1-12 of	12 🕨 Las
Col Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1 A.BUSINESS_UNIT - Business Unit	Char5				Unit	94	Edit	-
2 A.ASSET_ID - Asset Identification	Char12	1			Asset ID	9	Edit	-
3 A.TAG_NUMBER - Tag Number	Char12				Tag Number	9	Edit	-
4 A.DESCR - Description	Char30				Descr	9	Edit	-
5 A.ACQUISITION_CD - Acquisition Code	Char1		N		Acq Code	9.	Edit	-
6 A.ACQUISITION_DT - Acquisition Date	Date				Acq Date	9	Edit	-
7 A.PROFILE_ID - Asset Profile ID	Char10				Profile ID	9	Edit	-
8 A.SERIAL_ID - Serial ID	Char20				Serial ID	9	Edit	-
9 B.CATEGORY - Asset Category	Char5				Category	9	Edit	-
10 B.COST - Total Cost	SNm25.3				Cost	94	Edit	-
11 B.DEPTID - Department	Char10				Dept	9	Edit	
12 C LOCATION - Location Code	Char10				Location	9	Edit	





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.

ORACLE [®]										
Records Query Expression	s Prompts	Fields	Criteria	Having	View SQ	L Run				
Query Name BOR_AM_	ASSET_LISTING	3		De	scription	Asset Listin	g for Auditors			
View field properties, or use field a	as criteria in quer	v statemen	t					Reorder / S		
Fields	Enter a nan	ne to sav	e this qu	ery as:			×			
Col Record.Fieldname							Help	riteria		
1 A.BUSINESS_UNIT - Busine	*Query:	BOR_A	M_ASSET	LISTING						
2 A.ASSET_ID - Asset Identific	Description	Asset Li	sting for A	uditors						
3 A.TAG_NUMBER - Tag Numb	Folder:									
4 A.DESCR - Description	*Query Type:	*Query Type: User								
5 A.ACQUISITION_CD - Acqui	*Owner:	Public		•						
6 A.ACQUISITION_DT - Acquis	Query Defin	ition:								
7 A.PROFILE_ID - Asset Profile	BOR Mod, v	9.2, TSK23	578, Robe	t Prescott, 2	2015/01/12					
8 A.SERIAL_ID - Serial ID	BOR AM Qu	eries								
9 B.CATEGORY - Asset Catego										
10 B.COST - Total Cost	ОК	С	ancel							
11 B.DEPTID - Department										
12 C.LOCATION - Location Code								4		
Save Save As	New Query	Prefe	erences	Propert	ties	Publish as F	Feed Ne	w Union		

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.

Query Name BOR_AM_A	ASSET_LISTING		Descripti	on Asset Listing for A	uditors
d properties, or use field as	s criteria in querv	statement.			Reorde
	Enter a name	e to save this qu	ery as:		×
ord.Fieldname	(Help riteria
JSINESS_UNIT - Busines	*Query:	980_HD_AM_ASS	ET_LISTING		2
SSET_ID - Asset Identifica	Description:	Asset Listing for A	uditors		
AG_NUMBER - Tag Numb	Folder:				2
ESCR - Description	*Query Type:	User	•		4
CQUISITION_CD - Acquis	*Owner:	Private			
CQUISITION_DT - Acquis	Query Definit	ion:			4
ROFILE_ID - Asset Profile	BOR Mod, v9.	2, TSK23578, Robe	rt Prescott, 2015/01	1/12	-
ERIAL_ID - Serial ID	BOR AM Quer	ries			2
ATEGORY - Asset Catego					.4
OST - Total Cost	OK	Cancel			4
EPTID - Department					2
DCATION - Location Code					
Save As	New Query	Preferences	Properties	Publish as Feed	New Unic





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.

ïew field properties, or use	field as criteria in quer	Reorder /	Sort						
Fields		Personalize Find V	iew All 💷 🛗	First 🚺 1-12 of	12 🕨 Las				
ol Record.Fieldname		Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1 A.BUSINESS_UNIT - B	usiness Unit	Char5				Unit	9 <mark>.</mark>	Edit	-
2 A.ASSET_ID - Asset Id	entification	Char12	1			Asset ID	9.	Edit	
3 A.TAG_NUMBER - Tag	Number	Char12				Tag Number	9.	Edit	-
4 A.DESCR - Description		Char30				Descr	94	Edit	-
5 A.ACQUISITION_CD -	Acquisition Code	Char1		N		Acq Code	9	Edit	-
6 A.ACQUISITION_DT -	Acquisition Date	Date				Acq Date	94	Edit	-
7 A.PROFILE_ID - Asset	Profile ID	Char10				Profile ID	94	Edit	-
8 A.SERIAL_ID - Serial II	D	Char20				Serial ID	94	Edit	-
9 B.CATEGORY - Asset	Category	Char5				Category	9.	Edit	-
10 B.COST - Total Cost		SNm25.3				Cost	9.	Edit	-
11 B.DEPTID - Departmen	t	Char10				Dept	9.	Edit	-
12 C.LOCATION - Location	n Code	Char10				Location	9.	Edit	-

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	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 -				98	80_HD_/	AM						
	Search	Advanced Sea	rch										
	Sear	ch Results											
	*Folder View	All Folders -											
Cł	neck All	Uncheck A	All		*Action	- Choose	9		- Go				
Quer	Query Personalize Find View All 🔄 🛗 First 🚺 1 of 1 🔟 Last												
Select	Query Name		Descr		Owner		Folder	Edit	Run to HTMI	Run to Excel	Run to XMI	Schedule	
	980_HD_AM_AS	SET_LISTING	Asset Listing for A	uditors	Private			Edit	HTML	Excel	XML	Schedule	

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