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

4. Click the **Properties** link at the bottom of the page:
5. On the Query Properties page, update the query name to the correct naming convention and click **OK**.

6. 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.

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

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