

QUERY—SAVE A PUBLIC QUERY AS A PRIVATE QUERY

Using **UHV_COST_CENTER_BY_DEPT** as an example.

Access the Financial Production database: <https://my.uh.edu/fs>

Or, See the [SignOn Financial Production](#) job aid.

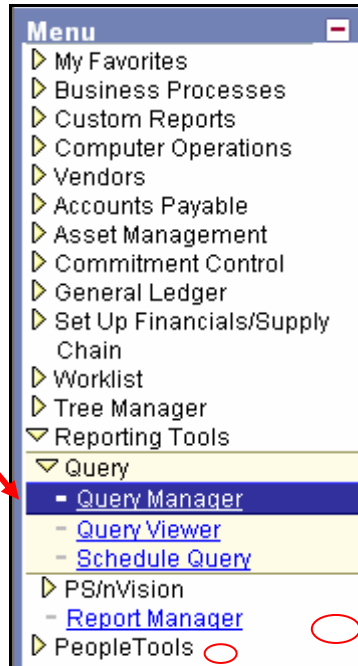
Remember to use ALL CAPS

OR: Open a new window, if already in PeopleSoft.

NAVIGATION

From the **Menu** select:

- ▶ Reporting Tools
- ▶ Query
- ▶ Query Manager






Be sure to add to "Favorites"!

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INSTRUCTIONS

STEP 1: SEARCH FOR & SELECT QUERY :

- **Name** - you can search by query name or description
(Default is **Name**; Click  for options)
- **begins with** - you can search by the start of the query name/description (i.e. "UHV"... in the text field), or
- **contains** (i.e., "cost", in the text field).
(Default is **begins with**; Click  for options)
- Click on 
- Choose the public query needed from the list that appears in the **Search Results** by clicking once on the query name ([link](#)).
(i.e., **UHV_COST_CENTERS_BY_DEPT**)

Query Viewer

Find an Existing Query

Search by:

Query Manager

Find an Existing Query

Search by:

Query Type:

Search Results

Query	Description	Access	Actions
UHV_COST_CENTERS_LISTS_BY_DEPT	List of cost centers in a dept	Private	Delete Rename Run Schedule
ASSET_COST_CURRENT_BALANCE	Asset Cost Current Balance	Public	Run Schedule
FINQA_AP_LC_CM_RMATCH_COST	Landed Cost CM_RMATCH_COST-RTV	Public	Run Schedule
FINQA_ARCHIVE_COST	REC	Public	Run Schedule
FINQA_CHARTFIELD_COST		Public	Run Schedule
UHS_AM_COST	Asset Mgmt Financial Info	Public	Run Schedule
UHS_AM_VALID_COST_CENTER	Valid Chart Field Combinations	Public	Run Schedule
UHS_COST_CNTR_AP_DISTRIB	Match cost cntr recs to ap dis	Public	Run Schedule
UHS_PO_HUB_COST_CENTER	PO HUB - Cost Center	Public	Run Schedule
UHS_PO_LEDGER_5_COST_CENTER	PO with Ledger 5 Cost Centers	Public	Run Schedule
UHS_SA_COST_CENTER		Public	Run Schedule
UHS_SPEEDTYPE_BY_COST_CENTER		Public	Run Schedule
UHV_COST_CENTERS_BY_DEPT	List of cost centers in a dept	Public	Run Schedule

STEP 2: TO SAVE AS A PRIVATE QUERY.

Fields Tab comes up after having selected the query. (This is a listing of the fields in the Query you have selected)

- Click on the [Save As](#) link at the bottom of the **Fields** tab.

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

Query Name: UHV_COST_CENTERS_BY_DEPT Description: List of cost centers in a dept

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

Col	Record	Fieldname	Format	Ord	XLAI	Am	Heading Text	Add Criteria	Edit	Delete
1	A	BUSINESS_UNIT - Business Unit	Char5				Unit		<input type="button" value="Edit"/>	<input type="button" value="-"/>
2	A	EFFDT - Effective Date	Date				Eff Date		<input type="button" value="Edit"/>	<input type="button" value="-"/>
3	A	EFF_STATUS - Status as of Effective Date	Char1		N		Status		<input type="button" value="Edit"/>	<input type="button" value="-"/>
4	A	SPEEDTYPE_KEY - SpeedType Key	Char10				SpeedType		<input type="button" value="Edit"/>	<input type="button" value="-"/>
5	A	FUND_CODE - Fund Code	Char5				Fund		<input type="button" value="Edit"/>	<input type="button" value="-"/>
6	A	DEPTID - Department	Char10				DeptID		<input type="button" value="Edit"/>	<input type="button" value="-"/>
7	A	PROGRAM_CODE - Program Code	Char5				Program		<input type="button" value="Edit"/>	<input type="button" value="-"/>
8	B	DESCR - Description	Char30				Descr		<input type="button" value="Edit"/>	<input type="button" value="-"/>
9	B	MANAGER_NAME - Manager Name	Char30				Manager		<input type="button" value="Edit"/>	<input type="button" value="-"/>
10	A	PROJECT_ID - Project	Char15				Project		<input type="button" value="Edit"/>	<input type="button" value="-"/>

[New Query](#) [Preferences](#) [Properties](#) [New Union](#)

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STEP 3: ENTER A NAME TO SAVE THIS

QUERY AS WINDOW COMES UP.

- **Query** – Enter the new name for your use only.

Option: You can change the **Description** and **Query Definition**, if you want.

- **Click** **OK**.

Enter a name to save this query as:

*Query: UHV_COST_CENTERS_BY_DEPT
 Description: List of cost centers in a dept
 *Query Type: User
 *Owner: Private
 Query Definition:
 all cost centers in a dept; select by dept; lists fund, dept, program, descr, manager, project, status, speedtype

OK Cancel

RESULTS: THE FIELDS TAB RETURNS FOR THE NEW QUERY YOU JUST SAVED.

Now your copy of the public query is saved in your “private” listing. And will function the same as the public query.

It will appear at the top of your query searches because “private” queries appear before “public” queries.

Records Query Expressions Prompts **Fields** Criteria Having View SQL Preview

Query Name: UHV_COST_CENTER_LIST_BY_DEPT Description: List of cost centers in a dept

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		Edit	[-]
2	A	EFFDT - Effective Date	Date				Eff Date		Edit	[-]
3	A	EFF_STATUS - Status as of Effective Date	Char1		N		Status		Edit	[-]
4	A	SPEEDTYPE_KEY - SpeedType Key	Char10				SpeedType		Edit	[-]
5	A	FUND_CODE - Fund Code	Char5				Fund		Edit	[-]
6	A	DEPTID - Department	Char10				DeptID		Edit	[-]
7	A	PROGRAM_CODE - Program Code	Char5				Program		Edit	[-]
8	B	DESCR - Description	Char30				Descr		Edit	[-]
9	B	MANAGER_NAME - Manager Name	Char30				Manager		Edit	[-]
10	A	PROJECT_ID - Project	Char15				Project		Edit	[-]

Save Save As New Query Preferences Properties New Union Return to Search

To Run your new private query you can either run from here by clicking on the **Preview** Tab.

OR

Go to the **Query Viewer** to run as usual.

Records Query Expressions Prompts **Fields** Criteria Having View SQL **Preview**

Query Name: UHV_COST_CENTER_LIST_BY_DEPT Description: List of cost centers in a dept

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		Edit	[-]
2	A	EFFDT - Effective Date	Date				Eff Date		Edit	[-]
3	A	EFF_STATUS - Status as of Effective Date	Char1		N		Status		Edit	[-]
4	A	SPEEDTYPE_KEY - SpeedType Key	Char10				SpeedType		Edit	[-]
5	A	FUND_CODE - Fund Code	Char5				Fund		Edit	[-]
6	A	DEPTID - Department	Char10				DeptID		Edit	[-]
7	A	PROGRAM_CODE - Program Code	Char5				Program		Edit	[-]
8	B	DESCR - Description	Char30				Descr		Edit	[-]
9	B	MANAGER_NAME - Manager Name	Char30				Manager		Edit	[-]
10	A	PROJECT_ID - Project	Char15				Project		Edit	[-]

Save Save As New Query Preferences Properties New Union Return to Search