

## Introduction to Query For Query Viewers

Query is an ad-hoc reporting tool that allows you to retrieve data that is stored in the NUFinancials application. You use a series of query pages to specify what data to retrieve and the format in which results will be displayed. Query translates the information that you enter into SQL code to produce results which can be displayed in a browser window or downloaded to your workstation in an Excel spreadsheet.

There are two query access methods. **Query Viewer** allows execution of existing queries. Casual query users will only have access to queries via Query Viewer. **Query Manager** is used to create new queries or edit existing ones. It is also possible to execute queries from Query Manager. Query developers will have access to both query viewer and query manager pages.

## **Introduction to Query** For Query Viewers

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## 1. Query Viewer

**Navigation: Reporting Tools > Query > Query Viewer**

Query Viewer is used for executing public queries in HTML or Excel.

### A. Executing queries

#### Steps

1. Enter search criteria using **Basic** or **Advanced** Search (ex. **QY\_TRN**).
2. Click **Search**.

All queries with names that begin with the search characters that you entered in step a will be displayed in a results grid. You can use the **% wildcard character** to return queries that contain but don't begin with the characters that you entered as search criteria. Private queries will be listed first alphabetically followed by Public queries.

3. Click on the **HTML** hyperlink to the right (ex. **QY\_TRN\_04**).

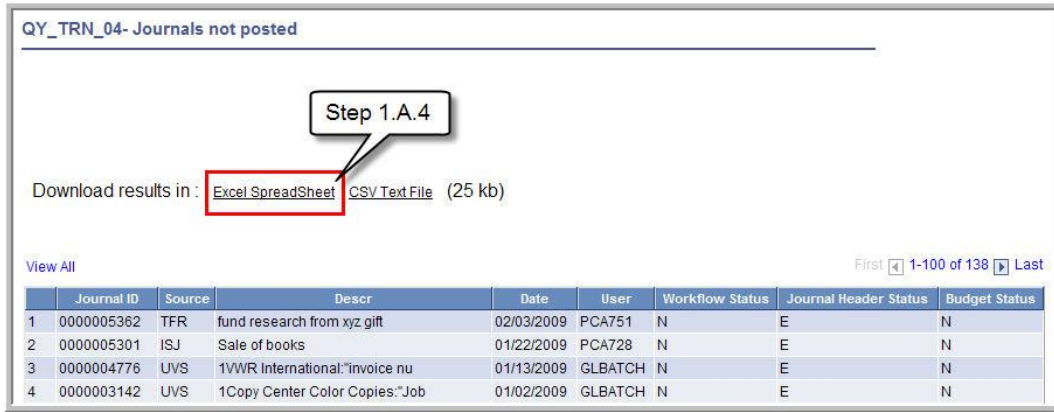
A new browser window will be opened that will display the results.

The screenshot shows the Query Viewer interface. On the left is a navigation menu with 'Reporting Tools' expanded to show 'Query' and 'Query Viewer'. The main area has a search box with 'Query Name' selected and 'begins with QY\_TRN' entered. A 'Search' button is highlighted. Below the search box is a 'Search Results' section with a 'Folder View' dropdown set to 'All Folders'. A table displays the search results:

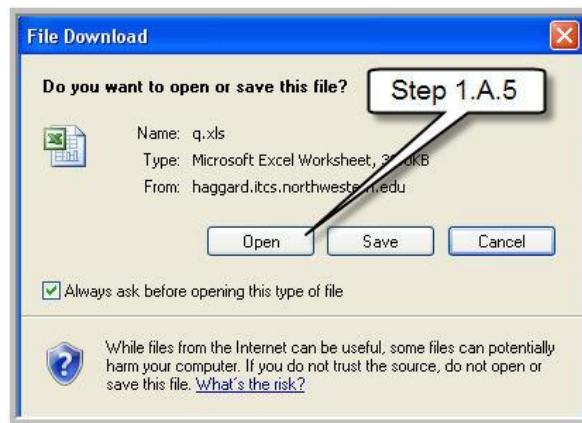
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
QY_TRN_04	Journals not posted	Private		HTML	Excel	Schedule	Favorite
QY_TRN_01	Journal Header Data	Public		HTML	Excel	Schedule	Favorite
QY_TRN_02	Journal Header and Line Data	Public		HTML	Excel	Schedule	Favorite
QY_TRN_03	Journal with prompts	Public		HTML	Excel	Schedule	Favorite

Annotations in the image point to: 'Step 1.A.1' (the search criteria input), 'Step 1.A.2' (the Search button), and 'Step 1.A.3' (the HTML link for QY\_TRN\_04).

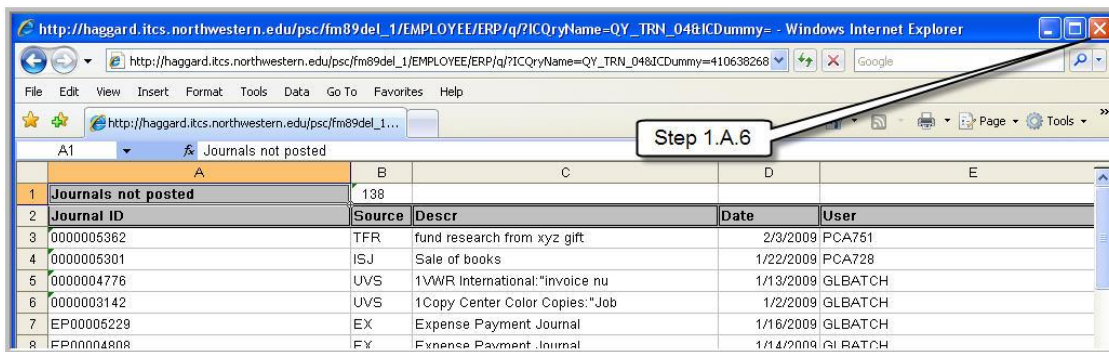
- Click on the **Excel Spreadsheet** hyperlink to download the query results to an Excel spreadsheet.



- A download window will open providing options to open the Excel file, save it to your workstation or cancel the request. Click **Open**.



- An Excel workbook will be opened in a new page, displaying your query results. Close the page by clicking on the red X icon in the upper right hand corner of the Excel page.



- You can also download results to Excel directly from the search page without first displaying them in a browser window. Click on the **Excel** hyperlink to the right.

**Query Viewer**  
Enter any information you have and click Search. Leave fields blank for a list of all values.

\*Search By:  begins with

[Advanced Search](#)

**Search Results**  
\*Folder View:

Query							
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
QY_TRN_04	Journals not posted	Private		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>	<a href="#">Favorite</a>
QY_TRN_01	Journal Header Data	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>	<a href="#">Favorite</a>
QY_TRN_02	Journal Header and Line Data	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>	<a href="#">Favorite</a>
QY_TRN_03	Journal with prompts	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">Schedule</a>	<a href="#">Favorite</a>

*Note: A callout box labeled "Step 1.A.7" points to the "Run to Excel" link in the first row of the table.*

## APPENDIX A-Query Terminology

Term	Definition
<b>Query</b>	<b>Query</b> gives users the ability to produce a report of information from a database.
<b>Database</b>	A <b>database</b> is a collection of related data.
<b>Record/Table</b>	<p>Within any database, data is organized into groupings called <b>Records/Tables</b>. The records/tables are the building blocks of the database. Each record contains related information.</p> <p>Examples of records include:</p> <ul style="list-style-type: none"> <li>- Journal information</li> <li>- PO information</li> <li>- Grant information</li> </ul> <p>Please Note: The terms records and tables are used interchangeably.</p>
<b>Fields</b>	<p><b>Fields</b> are the separate pieces of information contained <i>within</i> a record. Fields are also the column headings of an Excel Spreadsheet.</p> <p><b>Key Fields</b> uniquely identify a row of data and are identified with a key icon. A key field is also used to join one record to another when both records share the same key field.</p> <p>Some examples include: Journal ID, Budget Status, or Accounting Period</p>
<b>Joins</b>	<b>Joins</b> retrieve data from more than one table, presenting the data as if it came from one.
<b>Criteria</b>	<p><b>Criteria</b> are used to filter data from the database. Criteria helps to extract the specific information you would like to pull from the database. A criterion can include and/or exclude data.</p> <p>For an example you can specify a criterion to bring back data for a specific department number. This includes data for the desired department number and excludes all the rest.</p>
<b>Public vs. Private Queries</b>	<p>When a user saves a query they choose to save their query as either public or private.</p> <ul style="list-style-type: none"> <li>- <b>Public</b> can be seen by others</li> <li>- <b>Private</b> will only be seen by the person who created the query</li> </ul> <p>We have Public Queries created that users are more than welcome to use. If you do use public query you are <b>REQUIRED</b> to rename and save under your name.</p>