

QUERIES

The system has the functionality to analyze subsets of the database and return this data. This is done through means of a query. Queried data is returned in the following formats:

- To the computer screen
- To a report
- Output to Microsoft Excel workbook

Queries can be simple or complex in their function, and have the unique ability to be created with only minimal training. This course will focus only on the running of queries that have already been built; creation and modification of queries are beyond the scope of this manual. Depending on your security set-up, select Query Manager or Query Viewer. Information on both is offered next.

Navigation: Reporting Tools> Query>Query Viewer

QUERY VIEWER

QUERY VIEWER

Find an Existing Query

Search by: *Query Type:

[Create New Query](#)

You can then find an existing query by entering criteria in the Search by fields. The first field allows you to search by "Name" or "Description", while the second uses "Begins With" and "Contains", in the remaining blank field, you enter the value you are searching for. This is especially helpful when you only part of a name or description. Accordingly, the following types of searches may be chained together:

- Name Begins With XXX
- Name Contains XXX
- Description Begins With XXX
- Description Contains XXX
- If you are unsure of the name or description, leave the field blank and a list of all queries will be displayed.

Press on the button to search for the query. In our example, we will search for the value 'NDU'.

NOTE: The naming convention for North Dakota University System queries begin with NDU.

SEARCH RESULTS PAGE

The Search Results page appears. The results will list all queries that match the search criteria. The following information is displayed:

- Query name.
- Query description.
- Ownership. (Public or Private).
- Actions allowed. (Based on security access)

Here are some common queries:

NDU_AP69_TRXN_BY_DATE_FUND	AP Trxn by Fund and Date
NDU_GL53_VOUCHERS_FOR_ACCT	Vouchers paid under given acct
NDU_GL60_JRNLS_BY_ACCT	Journal Entries by Account
NDU_GL61_TRIALBAL_SUMS_ACCTG	TB Fnd Dept Sum by Per Fr/Th
NDU_GL75_JRNLS_BY_JRNLDT_ACCT	Journals With Project Fields
NDU_GL71_CASH_BY_JOURNAL	Cash Transactions by Journal

Scroll to the name of the query that you want to run.

Not all queries appear on the page. To see more of the list, use the navigation buttons and links located on the header bar.



To display all of the queries, select View All and use the scrollbar to go through the rest of the list.

To run a query from the list of queries, click the Run hyperlink located on the same row as the required query name. If there are no prompts in the query, a new browser instance will display with the results of your query.

If there are prompts defined in the query, you will need to enter the desired criteria in the prompt fields prior to seeing the results. Prompts make the query dynamic in that each time it is run, you can change the selection criteria.

Then press VIEW RESULTS to display the results of your query.

DOWNLOADING THE QUERY AS AN EXCEL SPREADSHEET

You have the option of downloading your query to an Excel spreadsheet. Click the hyperlink [An Excel Spreadsheet](#)  link to open the file in your browser in Excel. If you are using Excel 2000, the Excel spreadsheet will appear in your browser. To save, select **File, Save As**. If you are using Office 97, the **File download** dialog box appears. You have the choice of opening the file in your browser or saving it to disk.

Note: If nothing happens after hitting the Excel download hyperlink, hold the Control Key and hit the Excel download button again.

PRINTING A QUERY

To print a query, you must first have run the query and have it displayed in your browser. Select the **Print** button from your browser or select **File, Print** from your browser menu. The query will be printed on your default printer.

Navigation: Reporting Tools> Query> Query Viewer

QUERY VIEWER PAGE

*Search By: begins with

[Advanced Search](#)

Search Results

*Folder View:

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites	Query Download
NDU_PO01_OPEN_PO_REPORT	Open Purchase Orders	Public		HTML	Excel	Schedule	Favorite	Query Download
NDU_PO02_PO_NO_BUDGET_CHECK	PO's Not Budget Checked	Public		HTML	Excel	Schedule	Favorite	Query Download
NDU_PO03_PO_LINE_DISTRIB	PO Line Distrib	Public		HTML	Excel	Schedule	Favorite	Query Download
NDU_PO04_NON_EXP_ACCT_CODES	PO's with non-expense accounts	Public		HTML	Excel	Schedule	Favorite	Query Download
NDU_PO05_PO_BY_USERID	PO'S ENTERED BY USERID	Public		HTML	Excel	Schedule	Favorite	Query Download
NDU_PO06_REQ_BY_USERID	REQUISITION BY ENTERER	Public		HTML	Excel	Schedule	Favorite	Query Download
NDU_PO07_PO_BY_BUS_UNIT	PO'S ENTERED BY BUS UNIT	Public		HTML	Excel	Schedule	Favorite	Query Download
NDU_PO08_REQ_BY_BUS_UNIT	REQUISITION BY BUS UNIT	Public		HTML	Excel	Schedule	Favorite	Query Download
NDU_PO09_PO_DTL_BY_BU_CF	PO Dtl by Bus Unit & Chart Fld	Public		HTML	Excel	Schedule	Favorite	Query Download
NDU_PO11_SUM_BY_BU	PO Sum by Business Unit	Public		HTML	Excel	Schedule	Favorite	Query Download
NDU_PO12_SUM_BY_DEPT	PO Sum by Department	Public		HTML	Excel	Schedule	Favorite	Query Download
NDU_PO13_PO_CLOSING	PO Closing Data	Public		HTML	Excel	Schedule	Favorite	Query Download
NDU_PO17_PO_BY_PO_DATE	PO's By PO Date	Public		HTML	Excel	Schedule	Favorite	Query Download

On this page, enter a portion or the entire query name you wish to access and then press the button, in the above example NDU_PO was entered. A list of queries will appear in the Search Results list. To run the query, press [Run](#). The following page appears.

NDU_PO01_PO_NO_BUDGET_CHECK

Unit: 

No results are immediately available since this query has prompts defined for it. Therefore, prior to seeing the results, we must insert the required information. This query is prompting for the business unit. We can either enter a specific business unit such as MISU1 or we can enter a wildcard character (%) to select all values. Once the prompts are populated, then press VIEW RESULTS to see the results below.

Note: Some queries will have no prompts and therefore the results will be available immediately upon pressing the [RUN](#) hyperlink.

NDU_PO01_PO_NO_BUDGET_CHECK - PO's Not Budget Checked

Unit =

[View All](#) | [Rerun Query](#) | [Download to Excel](#)

	Unit	PO	Type	Status	Receipt	Dispatch	Method	PO Date	PO Ref	Vendor	Location
1	MISU1	0000000034	GEN	A	N	Y	PRN	04/24/2003		0000002268	MAIN
2	MISU1	0000000010	GEN	C	R	Y	PRN	04/02/2003	Old PO #35677	0000000458	MAIN
3	MISU1	0000000159	GEN	D	R	Y	PRN	02/04/2004		0000003687	MAIN

This view gives a quick look at the results. Since it is in the browser, you can print this page from the browser menu. However, if you want to download the information to Excel to analyze the information, press. [Excel Spreadsheet](#). This brings you to the same page but now in an Excel Spreadsheet as follows.

NDU_PO12_SUM_BY_DEPT_22536[1] [Compatibility Mode] - Microsoft Excel

Home Insert Page Layout Formulas Data Review View Developer

Clipboard Font Alignment Number Styles Cells Editing

E13 10/19/2009

1	PO Sum by Department											
2	PO No.	PO Status	Receipt Status	Vendor ID	PO Entered Date	PO Date	PO Amount	Receipt No	Voucher	Voucher Status	Voucher Amount	Invoice
3	0000001229	Compl	Received	0000006302	7/6/2009	7/6/2009	20,000.00	0000001200	00054685	Posted	20000.000	2043645,2045139,2045700,204390
4	0000001254	Compl	Received	0000000811	7/27/2009	7/27/2009	3,135.00	0000001193	00054536	Posted	3135.000	265327
5	0000001260	Canceled	Not Recvd	0000000811	7/29/2009	7/29/2009	4,180.00				0.000	
6	0000001265	Compl	Received	0000018723	8/4/2009	8/4/2009	4,149.60	0000001212	00055057	Posted	4149.600	1019
7	0000001266	Compl	Received	0000000431	8/4/2009	8/4/2009	7,268.00	0000001209	00054921	Posted	7268.000	46364042
8	0000001267	Compl	Received	0000000753	8/4/2009	8/4/2009	4,500.65	0000001184	00054077	Posted	4500.650	PVB2268
9	0000001268	Compl	Received	0000119311	8/4/2009	8/4/2009	4,794.00	0000001192	00054324	Posted	4794.000	268438140 - 38432329
10	0000001278	Compl	Received	0000119695	8/13/2009	8/13/2009	1,465.54	0000001198	00054642	Posted	1465.540	INV42619
11	0000001288	Compl	Received	0000002659	9/4/2009	9/4/2009	106.95	0000001215	00055060	Posted	106.950	712931
12	0000001290	Compl	Received	0000003072	9/8/2009	9/8/2009	1,615.09	0000001227	00054944	Posted	1615.090	9824462989, - 9824760352
13	0000001328	Compl	Received	0000114727	10/19/2009	10/19/2009	3,935.31	0000001246	00056846	Posted	3935.310	W83303920101
14	0000001338	Dispatched	Not Recvd	0000007793	11/3/2009	11/3/2009	10,277.00				0.000	
15	0000001354	Dispatched	Not Recvd	0000000431	11/23/2009	11/23/2009	5,948.00				0.000	
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sheet1

Ready

2 Microsoft Offi... 2 Microsoft Offi... BudgetTransactio... PeopleSoft 8 sess... https://www.con... Microsoft Excel ... 80%

11:31 AM

Now you can perform any Excel tasks you wish.

To save the spreadsheet, go to File, 'Save As'. Be sure to not only name the spreadsheet, but to also change the file type from the Web Page (HTM, HTML) to an Excel Worksheet (workbook) type.