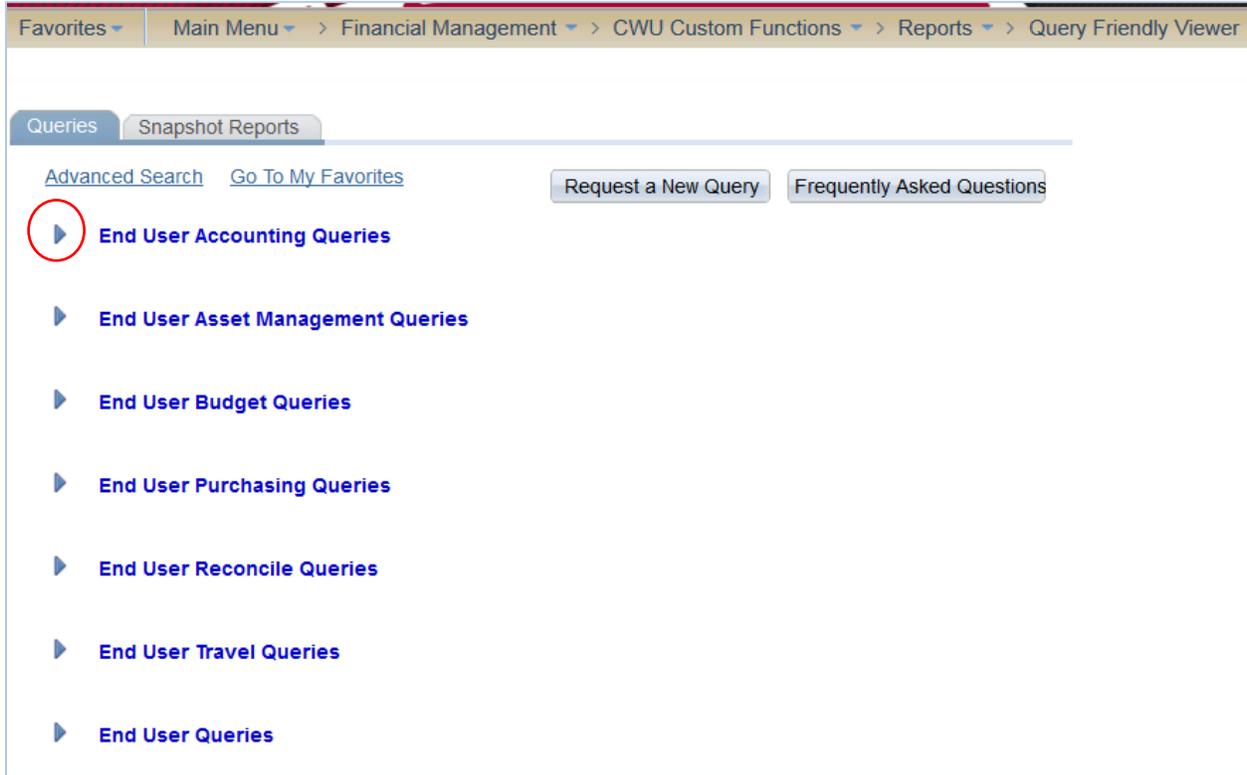


QUERY FRIENDLY VIEWER DOCUMENTATION

Navigate to the following: **Main Menu > Financial Management > CWU Custom Functions > Reports > Query Friendly Viewer**



Read through the query categories (e.g. End User Accounting Queries). Click the arrow to the left of the category you are interested in (circled in red). The arrows will both expand and collapse the categories. Once you have expanded the category, you will see a list of queries like this:

▼ **End User Accounting Queries**

	Query Name	Description	Purpose	Detail	HTML	Excel	Favorites
1	CWEU_AUTHORIZED_SIGNORS_PID_B	Authorized Signors by PID	Purpose	Detail	HTML	Excel	Favorites
2	CWEU_AUTH_PID_FOR_EMPLID_B	Auths on Projects by employee	Purpose	Detail	HTML	Excel	Favorites
3	CWEU_JRNL_BY_PROJECTID_B	Jrnl by Project ID, FY, & Per	Purpose	Detail	HTML	Excel	Favorites
4	CWEU_PROJECT_LIST_BY_DEPT_B	Project List for a Department	Purpose	Detail	HTML	Excel	Favorites
5	CWGL_PROJ_ID_BY_MANAGER_B	All Projects by Manager Name	Purpose	Detail	HTML	Excel	Favorites

Each query has a list of five associated links: **Purpose, Detail, HTML, Excel, and Favorites**.

Click the word 'Purpose' to see the 'Query Search View Purpose' information box as shown on the next page. On the left side of the box you will see a predefined purpose statement. On the right side of the

box is an editable text box where you can type notes relevant to your use of the query. Only you will see your notes. Be sure to click the Save Note button. Click OK to close the information box.

Query Search View purpose
Help

CWEU_AUTHORIZED_SIGNORS_PID_B

Purpose
Authorized Signors by Project_ID from Signature Authority.

Date/Time Last Executed

My Notes About This Query Save Note

This query is used to verify that the Budget Office has entered the Sig Auth forms I send over.

OK
Cancel

Click on the 'Detail' link to see the tables (Records) and fields used to build the table, including the SQL (Structured Query Language). The 'Query Manage Detail' page looks like the following:

Query Manage Detail
Help

Query Name CWEU_AUTHORIZED_SIGNORS_PID_B Authorized Signors by PID

Records Personalize | Find | View All

First 1-5 of 5 Last

1	CW_SIG_AUTH_PRJ	A
2	CW_SIG_AUTH_EMP	B
3	PROJECT_FS	C
4	CW_PERS_DATA	D
5	CW_SIG_AUTH_CD	E

Fields Personalize | Find | View All First 1-5 of 6 Last

1	Name	D.NAME
2	Transactions	E.CW_SIG_AUTH_CD
3	ID	B.EMPLID
4	Eff Date	B.EFFDT
5	Project	A.PROJECT_ID

```

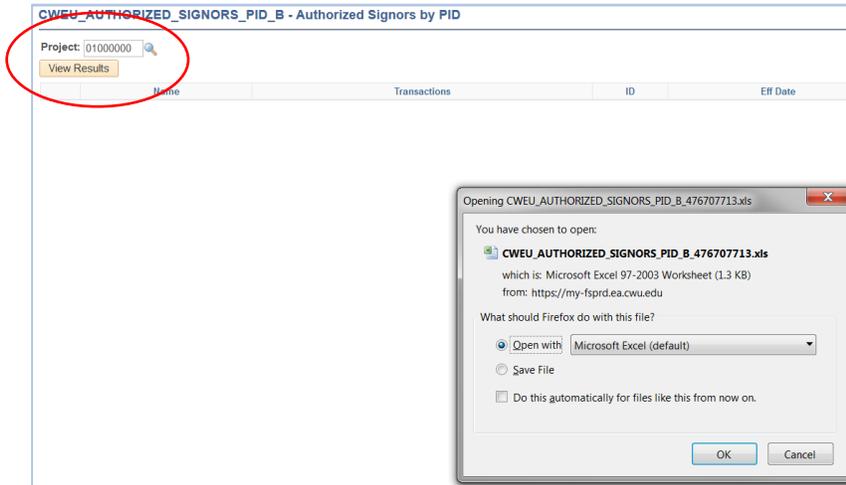
SQL SELECT D.NAME, E.CW_SIG_AUTH_CD, B.EMPLID, TO_CHAR(B.EFFDT,'YYYY-MM-DD'), A.PROJECT_ID, C.DESCR,
TO_CHAR(SYSDATE,'YYYY-MM-DD')
FROM PS_CW_SIG_AUTH_PRJ A, PS_CW_SIG_AUTH_EMP B, PS_PROJECT_FS C, PS_CW_PERS_DATA D, PS_CW_SIG_AUTH_CD E
WHERE ( B.BUSINESS_UNIT = A.BUSINESS_UNIT
AND B.PROJECT_ID = A.PROJECT_ID
AND ( B.EFFDT =
(SELECT MAX(B_ED.EFFDT) FROM PS_CW_SIG_AUTH_EMP B_ED
WHERE B.BUSINESS_UNIT = B_ED.BUSINESS_UNIT
AND B.PROJECT_ID = B_ED.PROJECT_ID
AND B.EMPLID = B_ED.EMPLID
AND B_ED.EFFDT <= SYSDATE)
AND A.BUSINESS_UNIT = C.BUSINESS_UNIT
AND A.PROJECT_ID = C.PROJECT_ID
AND B.EMPLID = D.EMPLID
AND A.PROJECT_ID = :1
AND B.EFF_STATUS = 'A'
AND A.BUSINESS_UNIT = E.BUSINESS_UNIT
AND A.PROJECT_ID = E.PROJECT_ID
AND E.EFFDT = B.EFFDT ) )
    
```

OK
Cancel

Click 'OK' or 'Cancel' to close this window.

Click on the 'HTML' link to run your query in your browser window. It will open in a new window.

Click on the 'Excel' link to run the query directly to Excel for download. However, if there are prompts for the query, a new browser window will open first. Enter the prompts and click View Results (circled in red below). The Open or Save dialog box will open and you can proceed as usual. Here is what the new window with the Open/Save dialog box will look like:

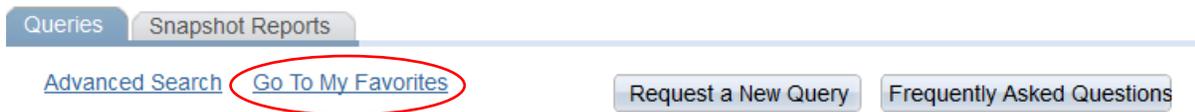


Click the 'Favorites' link to add a query to your favorites list which will appear at the bottom of the page below all of the query categories as shown here (Note the My Favorite Queries box title). After adding your query to My Favorites, be sure to scroll to the bottom of the page and click the Save button.



Click the minus (-) sign to remove from your favorites list.

Once you have saved some queries to your favorites, you can use the link at the top of the page (circled below) to navigate easily to your favorites:



From the top of the page you have a few additional options including: **Advanced Search**, **Request a New Query**, and **Frequently Asked Questions**.

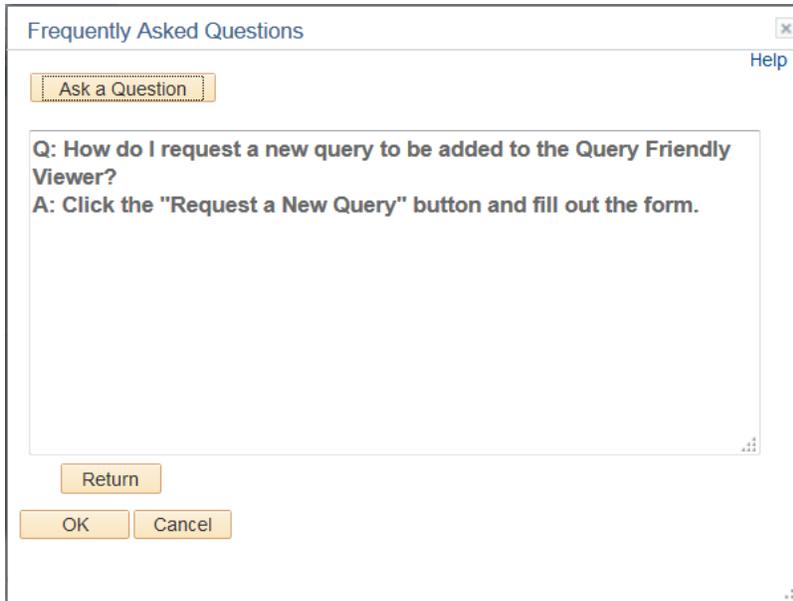
The 'Advanced Search' link will produce the 'Search by' box shown below where you can type in criteria, or select criteria using the magnifying glass, and then click the Search button. This functionality may become more meaningful if Query Friendly Viewer continues to grow with additional requests, but may not be necessary at this time.

A screenshot of the 'Search by' form. It has a blue header with the text 'Search by'. Below the header are five rows of search criteria, each with a dropdown menu, a text input field, and a magnifying glass icon. The criteria are: 'Query Name' (dropdown: 'begins with', input: empty), 'Category' (dropdown: '=', input: empty), 'Description' (dropdown: 'contains', input: empty), 'Keyword' (dropdown: '=', input: empty), and 'My Note Keyword' (dropdown: '=', input: empty). A 'Search' button is located at the bottom left of the form.

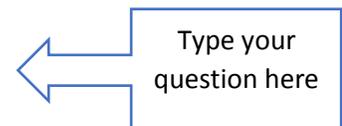
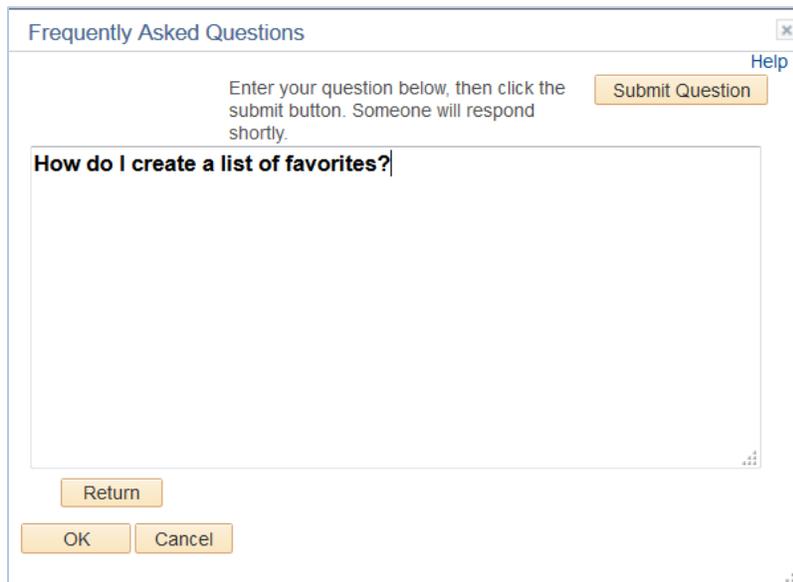
The 'Request a New Query' button is a link to the 'Data Request Form' available from the department of Organizational Effectiveness. If you are unable to find a query to meet your needs, or have an idea for another helpful query, please fill out the form and submit. There are several pages to this online form. All items marked with a red asterisk are required fields. Be sure to select Financial Management System (FMS) in the 'Data from' area of the Request Summary on the first page.

Once the form is submitted, personnel from Organizational Effectiveness will forward the form to the FMS team. You will be contacted as needed for additional information or to let you know when your request has been completed. Please contact either Lucinda Lunstrum (lunstrum@cwu.edu; ext 2626) or Tim McGuire (m McGuire@cwu.edu; ext 2329) if you need assistance with the form.

If you have a question regarding Query Friendly Viewer, click the Frequently Asked Questions button. When the 'Frequently Asked Questions' dialog box opens, scan through the questions and answers to see if your question is answered there. If not, click the 'Ask a Question' button at the top of the 'Frequently Asked Questions' dialog box as shown here:



The 'Frequently Asked Questions' dialog box will change as shown below. Click in the text box and type your question. Click the 'Submit Question' button when done. If you change your mind, just click 'Return' (you will be prompted to submit question or not) or click 'Cancel'.



Once you click 'Submit Question,' an email is sent to your FMS team for action. Commonly asked questions and their answers will be added to the Frequently Asked Questions list.

After you submit the question, you will be returned to the original Frequently Asked Questions dialog box. Click either 'Return' or 'Cancel'. You will be back at Query Friendly Viewer.