Running a Query

Business Process Guide

Updates

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Running a Query Overview

To request a query, please go to the following address:
http://www.cwu.edu/institutional-research/data-request-form
to fill out and submit the Data Request Form.

Before You Begin

*Prerequisites and Assumptions*

Before you can successfully perform the Running a Query process, it is assumed that each of the following conditions has been met:

- You have appropriate security to do so
- You know which query you wish to run
- If the query you wish to run does not exist, you know to complete the Data Request Form online at http://www.cwu.edu/institutional-research/data-request-form to request that the query be created
- This Business Process Guide is located in the bottom table (under *Staff Information*) of the web page that displays when you access the following address: http://www.cwu.edu/its-training/faculty-staff-guide
Attention: Please be aware many of the MyCWU CS user guides/ BPGs were developed for a previous version of MyCWU. We are working on updating these, but in the meantime there may be instances where you encounter slight discrepancies between what the guide advises and what you see on your screen. In most cases these changes are purely cosmetic, but there may be some impacts on functionality as well. If you have questions regarding these guides, please contact reg@cwu.edu.

1.0 Query Searches

Navigation: Main Menu > Campus Solutions > Reporting Tools > Query > Query Viewer

Follow the navigation path listed above to access the search page for Query Viewer.

Steps for Locating a Query:

1. There are different methods to use when searching for queries. If you know the beginning characters of the name of the query you wish to view, refer to the directions in section 1.1 below to carry out your query search.

2. If you do not know the beginning characters of the name of the query you wish to view, or if you simply wish to search for your query using other search criteria, refer to the directions in section 1.2 below.

1.1 Basic Query Search

Navigation: Main Menu > Campus Solutions > Reporting Tools > Query > Query Viewer

If you have not already accessed the Query Viewer page, follow the directions in section 1.0 above to do so.
Steps for Using Basic Query Search:

1. On the Query Viewer page, allow the Search By field to default in as Query Name.
2. To the right of “begins with,” enter the first few letters (or more) of the name of the query for which you are searching. If you don’t know the exact name of the query, it might help to identify the larger area from which the query originated:
   - Student Records queries begin with CWSRD_
   - Academic Progress queries begin with CWAAD_
   - Financial Aid queries begin with CWFAD_
   - Student Financials queries begin with CWSF_
   - Admissions queries begin with CWAD_
3. Click the button.

Tips for Working with a Query:

1. When the Search Results appear, be aware that there may be more than 100 items in the results. If so, you may need to click on the View 100 link in the Query title bar or navigate to other Search Results by clicking the left and right arrow keys.
2. When you locate the query you wish to view, you have several options:
   - If you wish to simply view the query information, click on the HTML link in the Run to HTML column. Refer to section 2.3 below.
   - If you wish to open the query in Excel, which will allow you to sort, rearrange, etc., the information, click on the Excel link in the Run to Excel column. Refer to section 2.4 below.
   - If you wish to add the query to your list of Favorites, click on the Favorite link in the Add to Favorites column. Refer to section 2.5 below.
3. Avoid clicking on the Schedule link. Most end users do not have access to it even though it looks as if it is an active link.

### 1.2 Advanced Query Search

**Navigation:** Main Menu > Campus Solutions > Reporting Tools > Query > Query Viewer

If you have not already accessed the Query Viewer page, follow the directions in section 1.0 above to do so.

1. When the Query Viewer page appears, click the Advanced Search link.

#### Steps for Using Advanced Query Search:

1. The Advanced Search page for queries includes additional criteria on which you may base your search. Not only are there additional fields but also ten different operator functions that may be used in conjunction with any of the search fields. The above search is looking for any Student Records queries that have specifically been written for academic departments that contain the word plan somewhere in their Description.

2. Once you have filled in all search fields that you wish to use to narrow your search, click the Search button.

3. To clear the information you entered into the fields on this page, click the Clear button.
Tips for Working with a Query:

1. When the **Search Results** appear, be aware that there may be more than 100 items in the results. If so, you may need to click on the **View 100** link in the **Query** title bar or navigate to other **Search Results** by clicking the left and right arrow keys.

2. When you locate the query you wish to view, you have several options:
   - If you wish to simply view the query information, click on the **HTML** link in the **Run to HTML** column. Refer to section 1.3 below.
   - If you wish to open the query in Excel, which will allow you to sort, rearrange, etc., the information, click on the **Excel** link in the **Run to Excel** column. Refer to section 1.4 below.
   - If you wish to add the query to your list of **Favorites**, click on the **Favorite** link in the **Add to Favorites** column. Refer to section 1.5 below.

3. Avoid clicking on the **Schedule** link. Most end users do not have access to it even though it looks as if it is an active link.

### 1.3 Open a Query in HTML

Assuming you have clicked on the **HTML** link as described in sections 1.1 and 1.2 above, follow the directions below. If not, see section 1.1 or 1.2 above.
1. You may be asked to enter additional search criteria. If so, enter the requested information. Use the magnifying glass, if need be.

2. Then click the button.

3. You may notice, when your search results display, that you still have the option of opening the results in an Excel Spreadsheet by clicking on the Excel Spreadsheet link, if desired. You may also choose to open the information as a comma-delimited file by clicking on the CSV Text File link. If a File Download box pops up, choose to open the file. You may save it as you would any other file on your computer. That way the information may be accessed at a later date without logging into Safari.

4. When finished with the query results, click the “X” in the upper right-hand corner to close the window and return to the Query Viewer page.

1.4 **Open a Query in Excel**

Assuming you have clicked on the Excel link as described in sections 1.1 and 1.2 above, follow the directions below. If not, see section 1.1 or 1.2 above.
1. You may be asked to enter additional search criteria. If so, enter the requested information. Use the magnifying glass, if need be.

2. Then click the button.

3. If a File Download box pops up, choose to the file.

4. The information will open as an Excel Spreadsheet file, ready to manipulate or save as you see fit.

5. When finished with your Excel file, click the “X” in the upper right-hand corner to close the window and return to the Query Viewer page.

### 1.5 Add a Query to Your List of Favorites

Assuming you have clicked on the Favorite link as described in sections 1.1 and 1.2 above, follow the directions below. If not, see section 1.1 or 1.2 above.

1. A listing of My Favorite Queries will appear at the bottom of the page.
2. To clear out the entire listing of your favorite queries, click the [Clear Favorites List] button.

3. To remove just a single query from your listing of Favorites, click the [-] button in the Remove column next to the query you wish to remove from the listing.

As long as you have at least one query that you have added to your Favorites, My Favorite Queries will display at the bottom of the Query Viewer page whenever the Query Viewer page is opened.