Running a Query Using the Query Friendly Viewer

Business Process Guide

Updates

<table>
<thead>
<tr>
<th>Date</th>
<th>Action</th>
<th>Page(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>07/23/12</td>
<td>Created</td>
<td></td>
</tr>
<tr>
<td>09/14/12</td>
<td>Added more information for My Note About This Query.</td>
<td>10-11</td>
</tr>
<tr>
<td>09/28/12</td>
<td>Updated CWU Data Request Form Information.</td>
<td>1-3</td>
</tr>
<tr>
<td>11/8/13</td>
<td>Updated links.</td>
<td>1-3</td>
</tr>
<tr>
<td>02/19/14</td>
<td>Updated navigation paths and screen shots for MyCWU.</td>
<td>all</td>
</tr>
<tr>
<td>08/30/17</td>
<td>Added disclaimer note</td>
<td>3</td>
</tr>
</tbody>
</table>

Table of Contents

Running a Query Overview ........................................................................................................... 2
Before You Begin .......................................................................................................................... 2
   Prerequisites and Assumptions ................................................................................................. 2
1.0 Query Friendly Viewer ........................................................................................................... 3
   1.1 Working with a Query in a Specific Category .................................................................. 4
   1.2 Advanced Query Search ..................................................................................................... 6
   1.3 Query Purpose ................................................................................................................... 8
   1.4 Query Detail ...................................................................................................................... 9
   1.5 Run a Query to HTML ....................................................................................................... 9
   1.6 Run a Query to Excel ....................................................................................................... 10
   1.7 Working with Your List of Favorite Queries ..................................................................... 11
Running a Query Overview

Queries will be run out of a non-production environment to maintain the processing speed of the production environment. The Report Database will be refreshed nightly.

You may request a query in one of two ways:

- Go to the following address: [http://www.cwu.edu/institutional-research/data-request-form](http://www.cwu.edu/institutional-research/data-request-form)
  to fill out and submit the CWU Data Request Form.

- Log into MyCWU and navigate to the Query Friendly Viewer page through the following navigation path: [Main Menu > Campus Solutions > CWU Reporting Solutions > Query Friendly Viewer](http://www.cwu.edu/institutional-research/data-request-form), and access the CWU Data Request Form by clicking on the Request a New Query button at the top of the page.

This Business Process Guide is located in the right-hand column of the html page that displays when you access the following address: [http://www.cwu.edu/its-training/faculty-staff-guide](http://www.cwu.edu/its-training/faculty-staff-guide)

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
- If the query you wish to run does not exist, you know to complete the CWU Data Request Form online through one of the two ways listed in the Overview above.
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 Friendly Viewer

Navigation:  Main Menu > Campus Solutions > CWU Reporting Solutions > Query Friendly Viewer

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

Steps for Locating a Query:

On the Query Friendly Viewer search page, you have multiple options:

- To search for a query in one of the categories that appear on the page, click on the to the left of the category. You'll notice that the category expands to show individual queries related to that category. Continue with the directions in section 1.1 below.
- To search for a query using advanced search options, click on the Advanced Search link at the top of the page, and then continue with the directions in section 1.2 below.
- To quickly navigate to your Favorite queries, click on the Go To My Favorites link at the top of
the page. Please note that, if your monitor is large enough that your list of My Favorite Queries already displays in your view, it will appear as if nothing happens when you click on the Go To My Favorites link. That is because clicking on that link simply takes a person to the bottom of the Query Friendly Viewer page, where your list of favorite queries is located. Refer to the directions in section 1.7 below for more information about your Favorite queries list.

- To request that a new query be written, click the Request a New Query button toward the top of the page. When the Query Request Form opens, fill out all fields in detail, and then Submit the form.
- To read the answers to frequently asked questions or to ask a question yourself, click the Frequently Asked Questions button toward the top of the page. When the Frequently Asked Questions page opens, you may ask a question by clicking the Ask a Question button, or read answers to other questions that have already been asked. Click the Return button to return to the Query Friendly Viewer search page when finished.

1.1 Working with a Query in a Specific Category

If you have not already clicked on the to the left of the category on the Query Friendly Viewer search page, follow the directions in section 1.0 above to do so.
Tips for Working with a Query:

1. To learn more about one of the queries listed, you have two options:
   - Click on the **Purpose** link to the right of the query. Refer to the directions in section 1.3 below.
   - Click on the **Detail** link to the right of the query. Refer to the directions in section 1.4 below.

2. To actually run a query, you have two options:
   - If you wish to simply view the query information, click on the **HTML** link to the right of the query. Refer to the directions in section 1.5 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 to the right of the query. Refer to the directions in section 1.6 below.
3. To add the query to your list of Favorites, click on the Favorites link to the right of the query. Refer to the directions in section 1.7 below.

1.2 Advanced Query Search

Navigation: Main Menu > Campus Solutions > CWU Reporting Solutions > Query Friendly Viewer > Advanced Search

If you have not already accessed the Advanced Search page for Query Friendly Viewer, follow the navigation path above to do so.

Steps for Using Advanced Query Search:

1. The Advanced Search page for Query Friendly Viewer queries includes five different fields on which you may base your search. In addition, you will find different operator functions that may be used in conjunction with any of the search fields. The five fields include the following:
   - **Query Name** - 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_
9.0 Running a Query Using the Query Friendly Viewer

- **Admissions** queries begin with CWAD_.

- **Category** – Refers to the broad category to which the query belongs (A query may be found in more than one category if it applies to multiple areas.). Make use of the magnifying glass for **Category** if you would like to see the category choices.

- **Description** – This includes a short description of the query.

- **Keyword** – Keywords are created by the query writer to help a person locate a particular query. Unlike the Description, a query may have many keywords used to identify it. Make use of the magnifying glass for **Keyword** if you would like to see the keyword choices.

- **My Note Keyword** – This feature will search for keywords in a personalized note that you have the option to save about the query.

The search in the screen shot above is looking for any **Student Records** queries in the **Enrollment** category that have been labeled with a keyword of “enroll.”

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

**Tips for Working with a Query:**

1. *To learn more about one of the queries* listed in the search results, you have two options:
• Click on the **Purpose** link to the right of the query. Refer to the directions in section 1.3 below.
• Click on the **Detail** link to the right of the query. Refer to the directions in section 1.4 below.

2. **To actually run a query** listed in the search results, you have two options:
   • If you wish to simply view the query information, click on the **HTML** link to the right of the query. Refer to the directions in section 1.5 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 to the right of the query. Refer to the directions in section 1.6 below.

3. **To add a query in the search results to your list of Favorites**, click on the **Favorites** link to the right of the query. Refer to the directions in section 1.7 below.

### 1.3 Query Purpose

If you have not already clicked on the **Purpose** link to the right of the query on the Query Friendly Viewer page, follow the directions under **Tips for Working with a Query** in section 1.1 or 1.2 above to do so.

[![Query Search View Purpose](image)]

The user may enter his/her own **Personal Notes** about the query in this freeform field. Avoid using symbols (| @ # $ % ^ & * () - + = | \ { ] : ; ' < , > . ? /) in your note as they will be stripped from your keyword when you save. Be sure to click the Save Note button above when finished entering the **Personal Note**!

Other types of information may appear on this page depending on the specific query whose **Purpose** you are viewing.

Doing so will display the **Query Search View Purpose** page.
1. You may read about the **Purpose** for the query and other pertinent information on this page (See notes in screen shot above).

2. To enter your own personal note about the query, type your note in the **My Notes About This Query** field. Remember to click the **Save Note** button above the field when finished.

3. When finished with the **Query Search View Purpose** page, click **OK** or **Cancel** to return to the **Query Friendly Viewer** page. Return to the directions under **Tips for Working with a Query** in section 1.1 or 1.2 above.

### 1.4 Query Detail

If you have not already clicked on the **Detail** link to the right of the query on the **Query Friendly Viewer** page, follow the directions under **Tips for Working with a Query** in section 1.1 or 1.2 above to do so.

![Query Manage Detail](image)

The **Query Manage Detail** page that displays reveals the **Fields** that will be in the output of the query.

2. When finished with the **Query Manage Detail** page, click **OK** or **Cancel** to return to the **Query Friendly Viewer** page. Return to the directions under **Tips for Working with a Query** in section 1.1 or 1.2 above.

### 1.5 Run a Query to 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 before proceeding.
1. You may be asked to enter additional search criteria on a prompt page. If so, enter the requested information. Use the magnifying glass, if need be.

2. Then click the View Results 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 at the top of the page, 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, close the window to return to the Query Friendly Viewer page. Return to the directions under Tips for Working with a Query in section 1.1 or 1.2 above.

1.6 Run a Query to 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 before proceeding.
1. You may be asked to enter additional search criteria on a prompt page. If so, enter the requested information. Use the magnifying glass, if need be.

2. Then click the button.

3. If an Opening... box pops up, choose to .

4. Then click .

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

6. When finished with your Excel file, exit Excel as well as the prompt window to return to the Query Friendly Viewer page. Return to the directions under Tips for Working with a Query in section 1.1 or 1.2 above.

1.7 Working with Your List of Favorite Queries

If you are attempting to add a query to your list of Favorite queries, this section assumes that you have clicked on the Favorites link as described in the directions under Tips for Working with a Query in sections 1.1 and 1.2 above. Make sure you have done that before proceeding with the rest of the directions below.

If you are simply accessing this section to learn more about your list of Favorite queries, proceed with the directions below.
1. A listing of **My Favorite Queries** will appear at the bottom of the page.

2. If you have just added a query to your list of **Favorites**, remember to click the **Save** button.

3. To remove a query from your list of **Favorites**, click the **Delete** button to the right of the query you wish to remove from the listing.

4. When the **Delete Confirmation** dialogue box displays, click the **OK** button to verify that you wish to delete the query from your list of Favorites, or click the **Cancel** button to exit the delete process without deleting it from your list of Favorites.

See the directions under **Tips for Working with a Query** in section 1.1 or 1.2 above for more information regarding these links.
5. 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 Friendly Viewer** page whenever the page is opened.

6. To learn more about the other links that you see to the right of each of the queries in your list of Favorite queries, refer to the directions under **Tips for Working with a Query** in section 1.1 or 1.2 above.

6. To quickly return to the top of the **Query Friendly Viewer** search page, click on the **Return to Top** link. Return to the directions under **Tips for Working with a Query** in section 1.1 or 1.2 above.