Financial Management System
End User Queries

Updates

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Overview

Many queries were written to supplement end user reporting needs at the time the Financial Management System was implemented. That list of queries has been pared down considerably.
1.0 Query Searches

Log into MyCWU. Navigate to Main Menu > Financial Management > Reporting Tools > Query > Query Viewer

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 characters “cweu.”
3. Click the button.

When the Search Results appear, you have several options.

If you wish to narrow the queries in the Search Results, refer to section 1.1 below.

4. If you wish to simply view the query information, click on the HTML link. Refer to section 1.2 below.
5. 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 that particular query’s row in the Search Results. Refer to section 1.3 below.
6. 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.

7. If you wish to add the query to your list of Favorites, click on the Favorite link. Refer to section 1.4 below.

### 1.1 Advanced Query Search

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.

2. The Advanced Search page for queries includes additional criteria on which you may base your search. For most end users, only the first two fields on this page are useful. There are also ten different operator functions that may be used in conjunction with either of the first two search fields. The above search is looking for any queries that “contain” the word “SIGNORS” somewhere in their Description. See the Informational note below.

There are two combinations of searches that seem to work well for end users:
- **Query Name:** “begins with” or “contains” whatever characters you wish to enter.
- **Description:** “contains” whatever characters you wish to enter.

3. Once you have filled in all search fields that you wish to use to narrow your search, click the Search button.
When the **Search Results** appear, you have several options.

4. If you wish to simply view the query information, click on the **HTML** link. Refer to section 1.2 below.

5. 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 that particular query's row in the **Search Results**. Refer to section 1.3 below.

6. 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.

7. If you wish to add the query to your list of **Favorites**, click on the **Favorite** link. Refer to section 1.4 below.

### 1.2 Open a Query in HTML

Assuming you have clicked on the **HTML** link as described in sections 1.0 and 1.1 above, follow the directions below. If not, see section 1.0 or 1.1 above.

1. You may be asked to enter additional search criteria. If so, enter the information needed.
2. Then click the **View Results** button.
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.

When finished with the query results, close the tab to return to the Query Viewer page.

### 1.3 Open a Query in Excel

Assuming you have clicked on the Excel link as described in sections 1.0 and 1.1 above, follow the directions below. If not, see section 1.0 or 1.1 above.

1. You may be asked to enter additional search criteria. If so, enter the information needed.
2. Then click the button.
3. Choose to open the file in Microsoft Excel.

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

When finished with your Excel file, close the tab to return to the Query Viewer page.

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

Assuming you have clicked on the Favorite link as described in sections 1.0 and 1.1 above, follow the directions below. If not, see section 1.0 or 1.1 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 **Remove** button in the row of 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.