



CENTRAL WASHINGTON UNIVERSITY

Financial Management + Human Resources + Campus Solutions

Financial Management System End User Queries

Updates

Date	Action	Page(s)
02/14/14	Document created.	
02/21/14	Updated directions in guide.	all
10/21/14	Updated link.	Cover plus 4-5
08/07/15	Removed reference to Chapter 6 in title of guide as well as other FMS chapters.	Cover, 2-3

Financial Services

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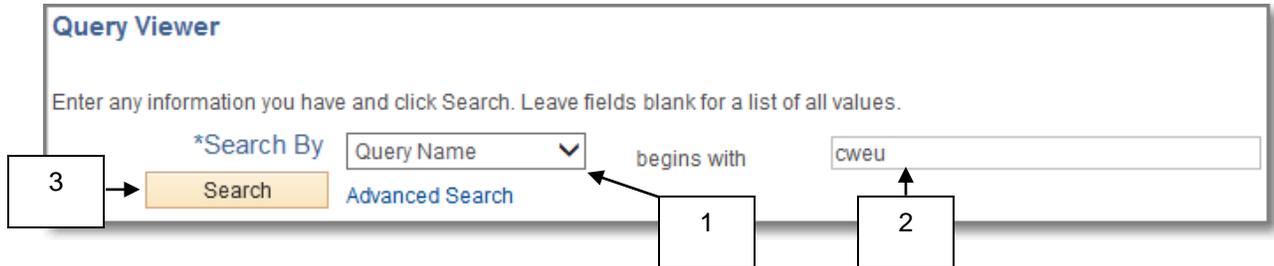
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Overview

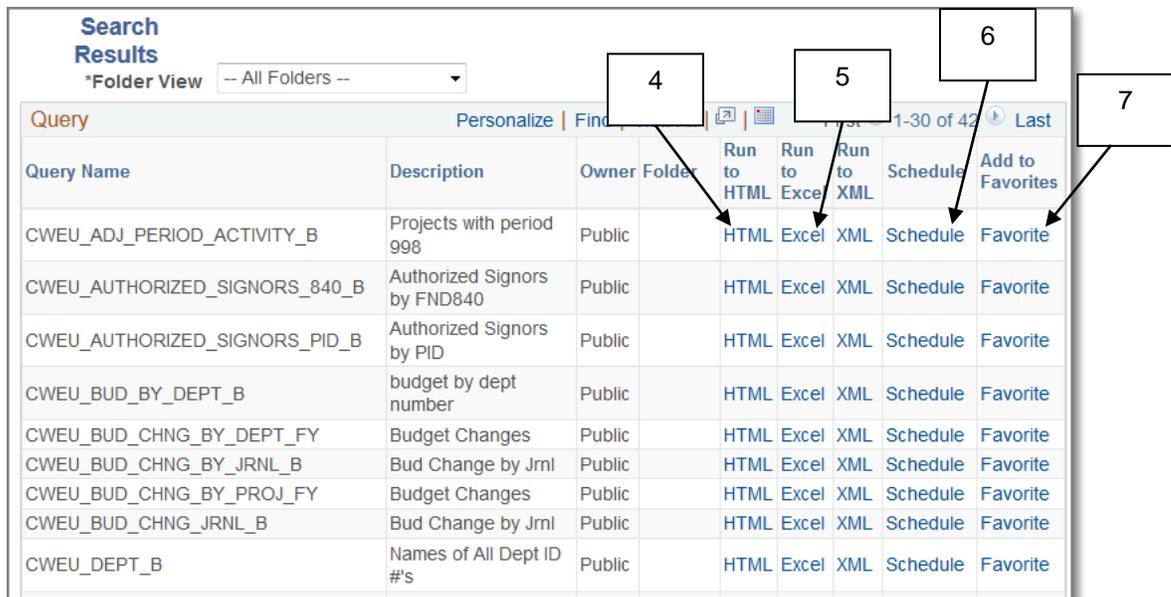
Many queries were written to supplement end user reporting needs at the time the Financial Management System was implemented. That list of queries has been pared down considerably.

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 **Search** 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.

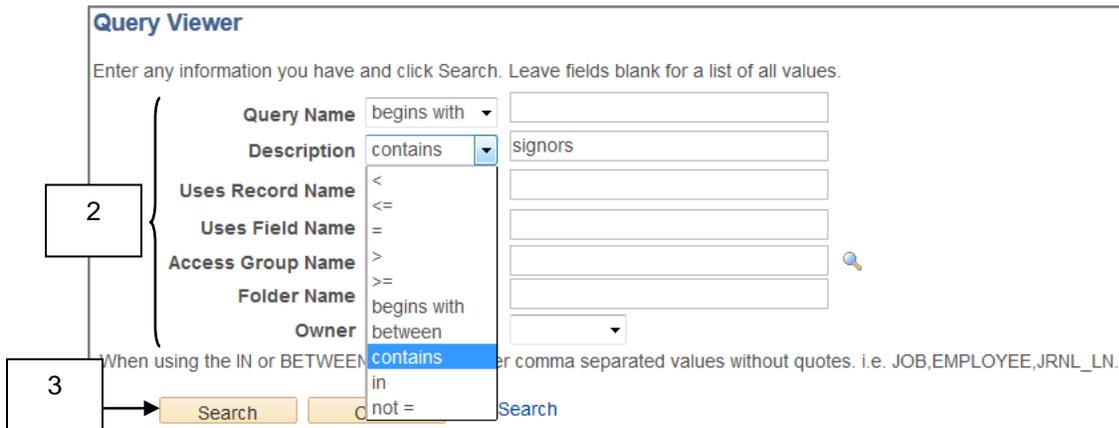
6. Avoid clicking on the [Schedule](#) link. Most end users do not have access to it even though it looks as if it is an active link.
7. If you wish to add the query to your list of **Favorites**, click on the [Favorite](#) link. Refer to section 1.4 below.

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.

i 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  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.

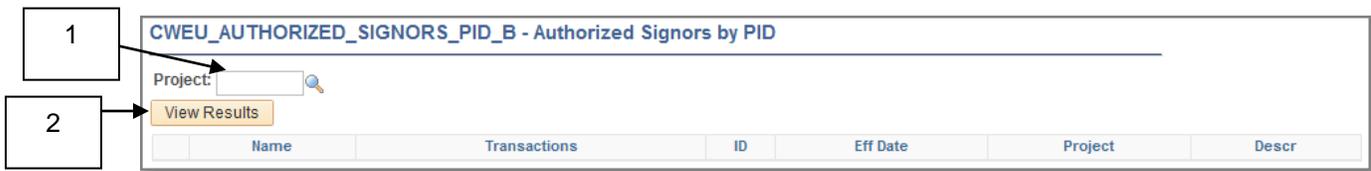


3. You may notice, when your search results display, that you still have the option of opening the results in an Excel Spreadsheet by clicking on the [Excel Spreadsheet](#) link, if desired.

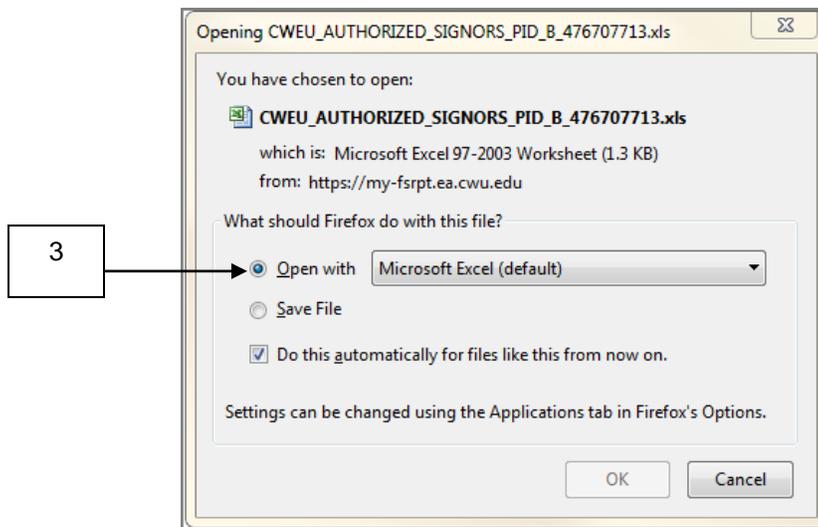
When finished with the query results, close the tab to return to the **Query Viewer** page.

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 [View Results](#) 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.

My Favorite Queries								
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to HTML	Schedule	Remove
CWEU_AUTHORIZED_SIGNORS_PID_B	Authorized Signors by PID	Public		HTML	Excel	XML	Schedule	-
CWEU_BUD_CHNG_BY_DEPT_FY	Budget Changes	Public		HTML	Excel	XML	Schedule	-
CWEU_MGR_PROMT_B	List of Projects by Mgr Name	Public		HTML	Excel	XML	Schedule	-
CWEU_PROJECT_LIST_BY_DEPT_B	List of Projects for Dept	Public		HTML	Excel	XML	Schedule	-
CWEU_PROJ_ACT_BY_DEPT_B	Proj Act Detail for a Dept	Public		HTML	Excel	XML	Schedule	-

Clear Favorites List

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 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.