

Running Queries



Users can access the **Query Viewer** to run pre-defined queries. The results of these queries will aid and assist in statistical analysis and decision making. This job aid explains the procedure for running a pre-defined query.

- Step 1.** Log into the Finance Application with your FIN Username and Password.

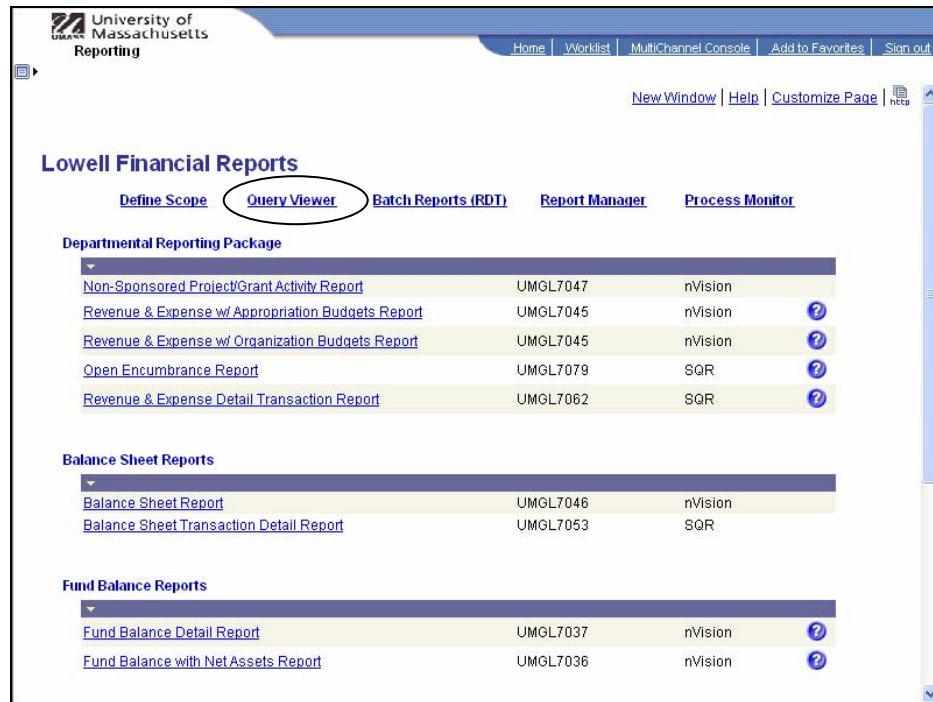


Navigate to the following path:

Report Center → Finance (or Grants) → Query Viewer

-or-

Reporting Tools → Query → Query Viewer



University of Massachusetts Reporting

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Help | Customize Page | neta

Lowell Financial Reports

[Define Scope](#) | **[Query Viewer](#)** | [Batch Reports \(RDT\)](#) | [Report Manager](#) | [Process Monitor](#)

Departmental Reporting Package

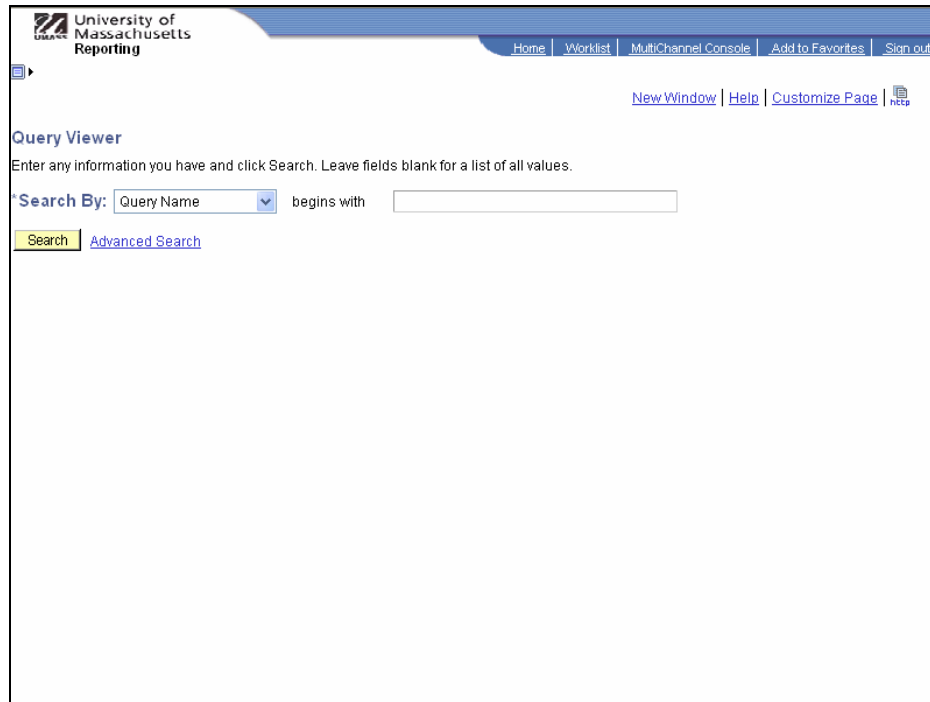
Non-Sponsored Project/Grant Activity Report	UMGL7047	nVision	
Revenue & Expense w/ Appropriation Budgets Report	UMGL7045	nVision	?
Revenue & Expense w/ Organization Budgets Report	UMGL7045	nVision	?
Open Encumbrance Report	UMGL7079	SQR	?
Revenue & Expense Detail Transaction Report	UMGL7062	SQR	?

Balance Sheet Reports

Balance Sheet Report	UMGL7046	nVision	
Balance Sheet Transaction Detail Report	UMGL7053	SQR	

Fund Balance Reports

Fund Balance Detail Report	UMGL7037	nVision	?
Fund Balance with Net Assets Report	UMGL7036	nVision	?



The screenshot shows a web application interface for the University of Massachusetts Reporting system. The page title is "University of Massachusetts Reporting". The navigation bar includes links for "Home", "Worklist", "MultiChannel Console", "Add to Favorites", and "Sign out". There are also utility links for "New Window", "Help", "Customize Page", and "Help". The main content area is titled "Query Viewer" and contains the instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values." Below this, there is a "Search By:" dropdown menu set to "Query Name", followed by the text "begins with" and an empty text input field. At the bottom of the search section, there are two buttons: "Search" and "Advanced Search".

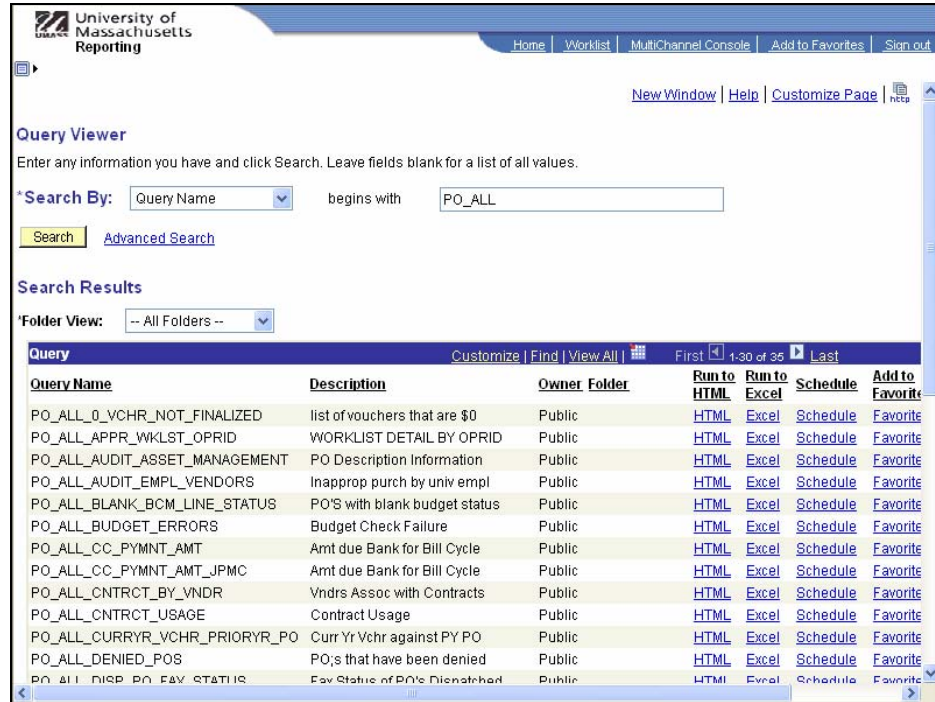
- Step 2.** Enter the **Query Name** (if known) or part of the **Query Name** (first letter or two). Otherwise, leave all the fields blank and proceed to the next step.



Note: Most queries begin with the module initials. For example, if the query is for Grants the module initials are "GM". Typing in a portion of the **Query Name** reduces the number of queries that will be returned and makes selecting the correct query more manageable. As time goes on, the list of queries could grow quite large.

Step 3.

Click Search.



The screenshot shows the 'Query Viewer' interface. At the top, there is a navigation bar with links for Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. Below this, the 'Query Viewer' section contains instructions to enter search information. A search filter is set to 'Query Name' and 'begins with' 'PO_ALL'. A 'Search' button is highlighted. Below the search section, the 'Search Results' section shows a table of query results. The table has columns for Query Name, Description, Owner, Folder, Run to HTML, Run to Excel, Schedule, and Add to Favorite. The results list various queries such as 'PO_ALL_0_VCHR_NOT_FINALIZED', 'PO_ALL_APPR_WKLIST_OPRID', and 'PO_ALL_AUDIT_ASSET_MANAGEMENT'.

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorite
PO_ALL_0_VCHR_NOT_FINALIZED	list of vouchers that are \$0	Public		HTML	Excel	Schedule	Favorite
PO_ALL_APPR_WKLIST_OPRID	WORKLIST DETAIL BY OPRID	Public		HTML	Excel	Schedule	Favorite
PO_ALL_AUDIT_ASSET_MANAGEMENT	PO Description Information	Public		HTML	Excel	Schedule	Favorite
PO_ALL_AUDIT_EMPL_VENDORS	Inapprop purch by univ empl	Public		HTML	Excel	Schedule	Favorite
PO_ALL_BLANK_BCM_LINE_STATUS	PO'S with blank budget status	Public		HTML	Excel	Schedule	Favorite
PO_ALL_BUDGET_ERRORS	Budget Check Failure	Public		HTML	Excel	Schedule	Favorite
PO_ALL_CC_PYMNT_AMT	Amt due Bank for Bill Cycle	Public		HTML	Excel	Schedule	Favorite
PO_ALL_CC_PYMNT_AMT_JPMC	Amt due Bank for Bill Cycle	Public		HTML	Excel	Schedule	Favorite
PO_ALL_CNTRCT_BY_VNDR	Vndrs Assoc with Contracts	Public		HTML	Excel	Schedule	Favorite
PO_ALL_CNTRCT_USAGE	Contract Usage	Public		HTML	Excel	Schedule	Favorite
PO_ALL_CURRYR_VCHR_PRIORYR_PO	Curr Yr Vchr against PY PO	Public		HTML	Excel	Schedule	Favorite
PO_ALL_DENIED_POS	PO's that have been denied	Public		HTML	Excel	Schedule	Favorite
PO_ALL_DSP_PO_FAV_STATUS	Fav Status of PO's Disatched	Public		HTML	Excel	Schedule	Favorite

Step 4. Click the [HTML](#) link next to the desired query.



Tip: To run the query directly to Excel, click the [Excel](#) link next to the desired query. Viewing the query results via HTML has minimal printing capabilities. The most effective way to print query results is to download to Excel and then print.

PO_ALL_PO_BAL_BY_DISTRIBUTION - PO Balances by Chrtfld Prompt

Unit:

Fund (Use % For All):

Dept (Use % For All):

Class (Use % For All):

Project (Use % For All):

Unit	PO No.	PO Date	Status	Rule	Buyer	Account	Dept	Fund	Class	Program	Project	Vendor	Name	Budg Dt	PO Amount	Vouchered Amount	PO Balance
------	--------	---------	--------	------	-------	---------	------	------	-------	---------	---------	--------	------	---------	-----------	------------------	------------




Tip: Each query is unique and yields different results. In some cases, the user is prompted to supply additional information before the query searches for the data. If additional information is required, follow **Steps 5 & 6**. Not all queries require this additional information; if additional information is not required, the results of the query will display immediately.

Step 5. Enter the data in the appropriate fields.

Step 6. Click .

PO_ALL_PO_BAL_BY_DISTRIBUTION - PO Balances by Chrtfld Prompt

Unit: 

Fund (Use % For All):

Dept (Use % For All):


Class (Use % For All):

Project (Use % For All):

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) (18 kb)

View All

	Unit	PO No.	PO Date	Status	Rule	Buyer	Account	Dept	Fund	Class	Program	Project
1	UMLOW	0100000001	08/29/2006	Dispatched	STANDARD	UM10005927	763100	L100600000	51161		B00	
2	UMLOW	0100000002	08/29/2006	Dispatched	STANDARD	UM10005927	763200	L200100000	51188		B00	
3	UMLOW	0100000003	08/29/2006	Dispatched	STANDARD	UM10005927	734200	L100700000	51179		B00	
4	UMLOW	0100000005	08/29/2006	Dispatched	STANDARD	UM10005927	734200	L400200000	51403		B00	
5	UMLOW	0100000006	08/29/2006	Dispatched	STANDARD	UM10005927	761330	L100800000	51180		B00	
6	UMLOW	0100000008	09/05/2006	Dispatched	STANDARD	UM99999946	740890	L400200000	51403		B00	
7	UMLOW	0100000009	09/06/2006	Dispatched	STANDARD	UM10005927	763100	L100600000	51161		B00	
8	UMLOW	0100000010	09/12/2006	Dispatched	STANDARD	UM10005927	763100	L680800000	53181		B00	F000171032
9	UMLOW	0100000011	09/12/2006	Dispatched	STANDARD	UM10005927	763100	L740800000	51161		B00	F000171034

- Step 7.** Review data that displays.
- Step 8.** Click the [Excel Spreadsheet](#) link to download the results to a Windows 98, Windows 2000, or Office 2000 version of Excel.
- Step 9.** Click the [CSV Text File](#) link to download the results as a CSV file, if needed.
- Step 10.** As the results opened in a new window, click  in the upper right-hand corner to close the window for the results of the query.
- Step 11.** Continue to run queries by returning to **Step 2** and following this procedure again.

End Procedure

Saving Favorites



A new feature in Finance 8.9 for queries is the ability to save favorite queries for those queries you run most often. Complete the following steps to save a query as a **Favorite**.

Step 1. Log into the Finance Application with your FIN Username and Password.

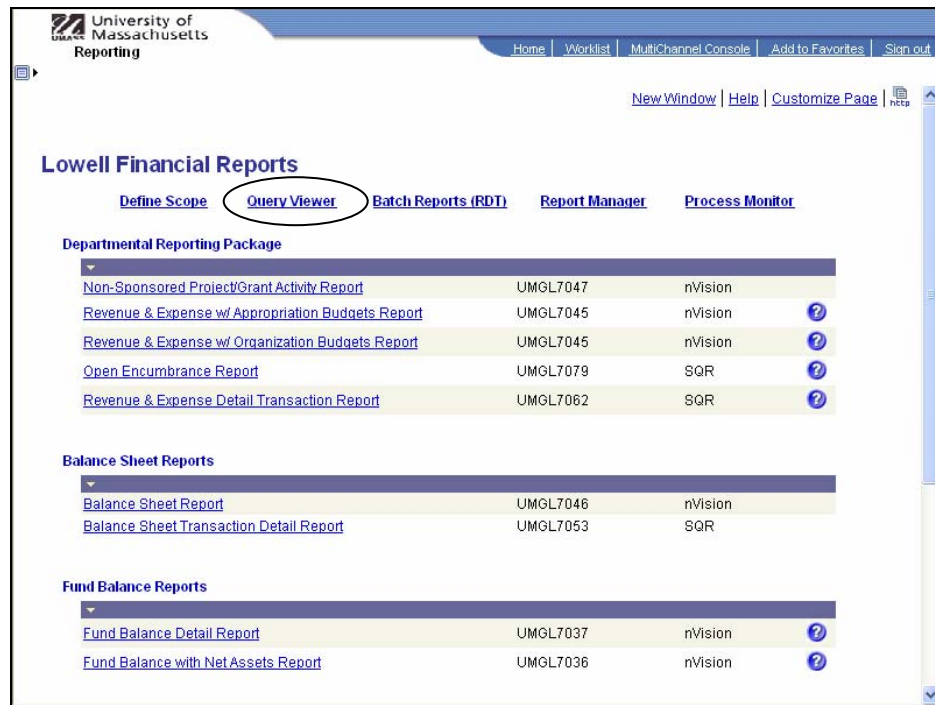


Navigate to the following path:

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University of Massachusetts Reporting

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New Window | Help | Customize Page | ncta

Lowell Financial Reports

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Departmental Reporting Package

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Revenue & Expense w/ Organization Budgets Report	UMGL7045	nVision	?
Open Encumbrance Report	UMGL7079	SQR	?
Revenue & Expense Detail Transaction Report	UMGL7062	SQR	?

Balance Sheet Reports

Balance Sheet Report	UMGL7046	nVision	
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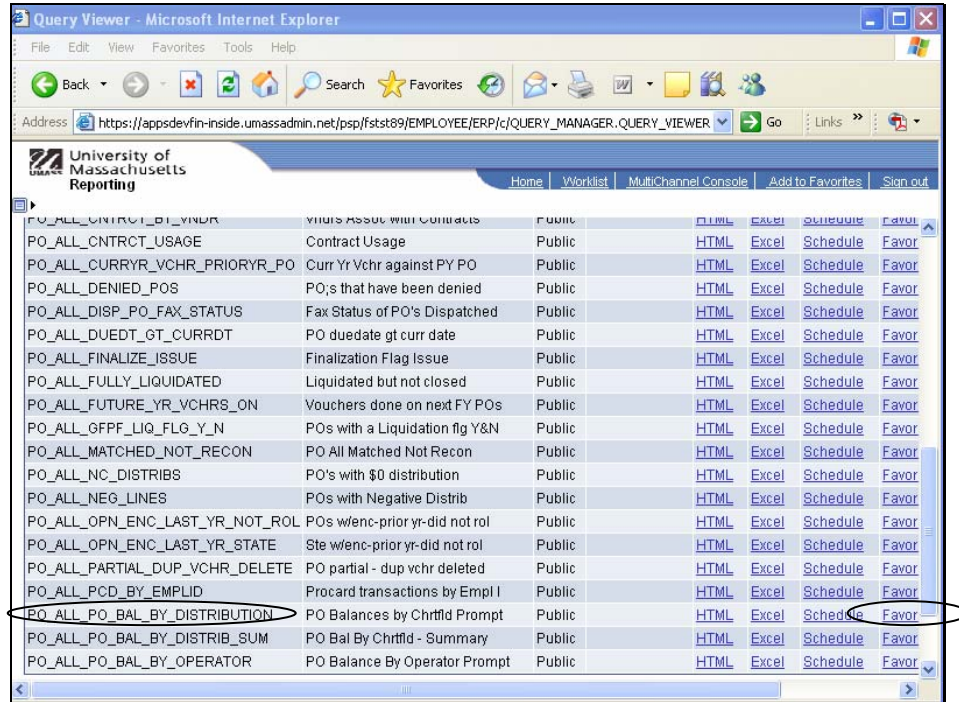


The screenshot shows a web application interface for the University of Massachusetts Reporting system. At the top left is the UMass logo and the text "University of Massachusetts Reporting". To the right of this is a navigation bar with links for "Home", "Worklist", "MultiChannel Console", "Add to Favorites", and "Sign out". Below the navigation bar are links for "New Window", "Help", "Customize Page", and a printer icon. The main content area is titled "Query Viewer" and contains the instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values." Below this instruction is a search form with a "Search By:" label, a dropdown menu currently set to "Query Name", and the text "begins with" followed by an empty text input field. At the bottom of the search form are two buttons: "Search" and "Advanced Search".

- Step 2.** Enter the **Query Name** (if known) or part of the **Query Name** (first letter or two). Otherwise, leave all the fields blank and proceed to the next step.

Step 3.

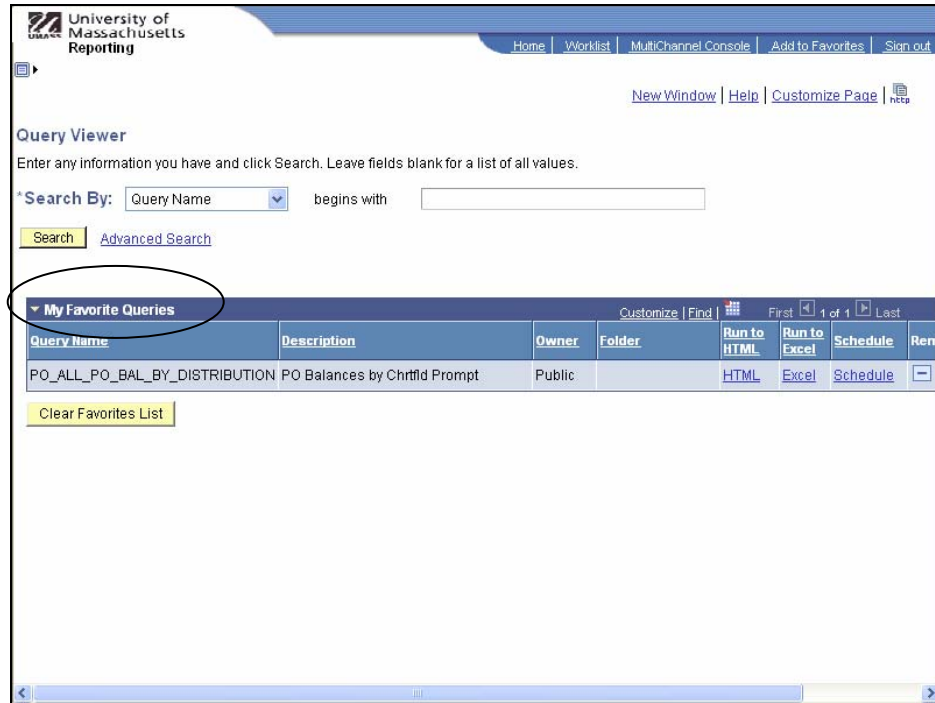
Click



Step 4. Click the [Favorite](#) link next to the desired query.



Note: Upon re-entering the **Query Viewer** and before searching for any queries, your **Favorite Queries** will be listed on the opening page of **Query Viewer**.



The screenshot shows the 'Query Viewer' interface. At the top, there is a navigation bar with links for 'Home', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign out'. Below this, there are links for 'New Window', 'Help', 'Customize Page', and 'http'. The main heading is 'Query Viewer' with a sub-heading 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a search section with a dropdown menu set to 'Query Name', a text input field for 'begins with', and buttons for 'Search' and 'Advanced Search'. A section titled 'My Favorite Queries' is circled in red. It contains a table with one row of data and a 'Clear Favorites List' button below it.

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Rem
PO_ALL_PO_BAL_BY_DISTRIBUTION	PO Balances by ChrtfId Prompt	Public		HTML	Excel	Schedule	-

End Procedure