

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 in running a pre-defined query.

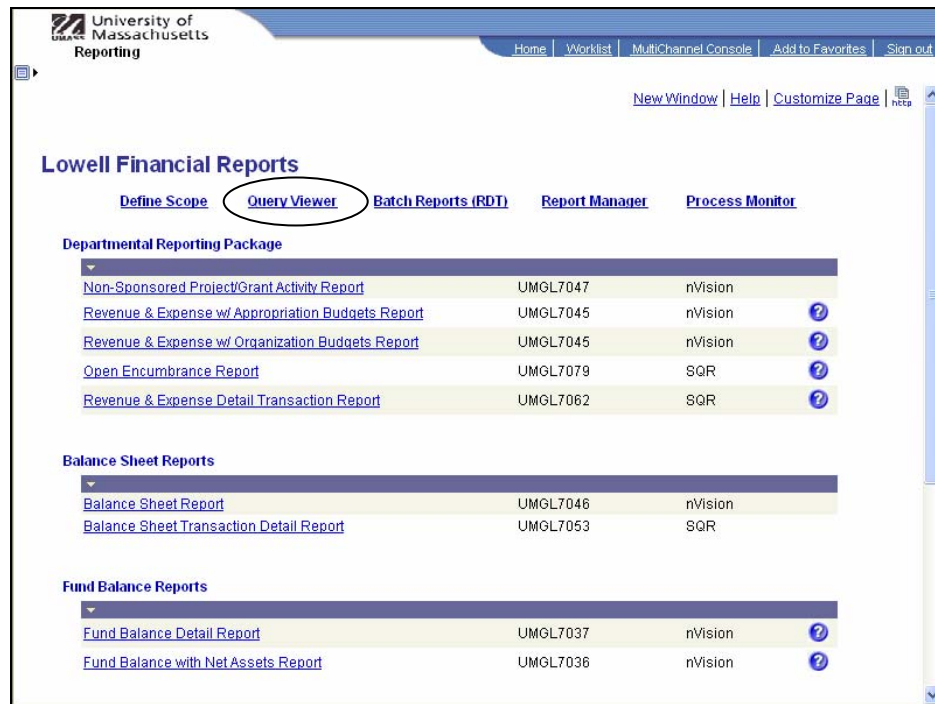
- Step 1.** Log on to the e*mpac Finance Application with your FIN Username and Password.



Report Center → Finance (or Grants) → Query Viewer

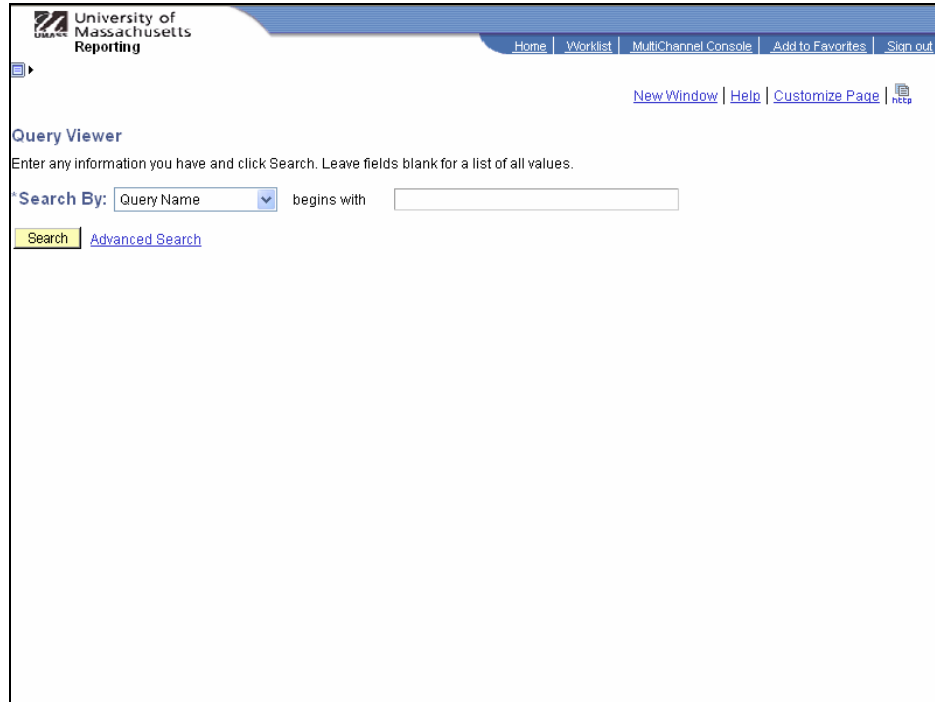
-or-

Reporting Tools → Query → Query Viewer



The screenshot shows the 'Lowell Financial Reports' section of the reporting application. The 'Query Viewer' link is circled in the navigation menu. Below the menu, there are three sections of reports: Departmental Reporting Package, Balance Sheet Reports, and Fund Balance Reports. Each report entry includes a link to the report, its ID (UMGL), and the reporting tool used (nVision or SQR).

Report Name	UMGL ID	Tool
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 Report	UMGL7046	nVision
Balance Sheet Transaction Detail Report	UMGL7053	SQR
Fund Balance Detail Report	UMGL7037	nVision
Fund Balance with Net Assets Report	UMGL7036	nVision



The screenshot shows the 'University of Massachusetts Reporting' 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', and 'Customize Page'. The main section 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.' There is a search form with a dropdown menu set to 'Query Name' and a text input field labeled 'begins with'. Below 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.



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 will reduce the number of query names that will be returned and make selecting the correct query more manageable. As time goes on the list of query names could grow quite large.

- Step 3.** Click  .



Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By: Query Name begins with PO_ALL

Search Results

*Folder View: -- All Folders --

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_DISP_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.

PO_ALL_PO_BAL_BY_DISTRIBUTION - PO Balances by Chrtfld Prompt

Unit: JML0W

Fund (Use % For All):

Dept (Use % For All):

Class (Use % For All):

Project (Use % For All):

[View Results](#)

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. Because of this, the user is prompted to supply additional information before the query searches for the data. If this is true follow steps 5 & 6. Not all queries require this additional information so when the user clicks the HTML link the results of the query will display like the screenshot after step 6.

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.



Tip: 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.

Step 9. Click the CSV Text File link to download the results as a CSV file, if needed.

Step 10. As the results opened into 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 e*mpac Financials version 8.9 for Queries is the ability to save favorite queries for those queries you run most often. Process the following steps to save a query as a **Favorite**.

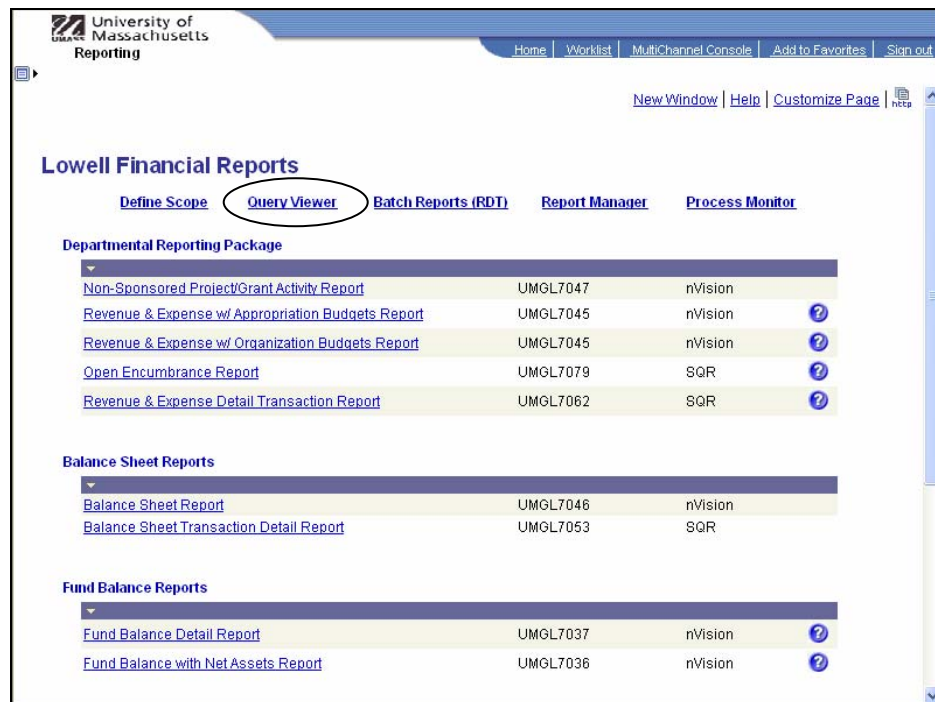
Step 1. Log on to the e*mpac Finance Application with your FIN Username and Password.

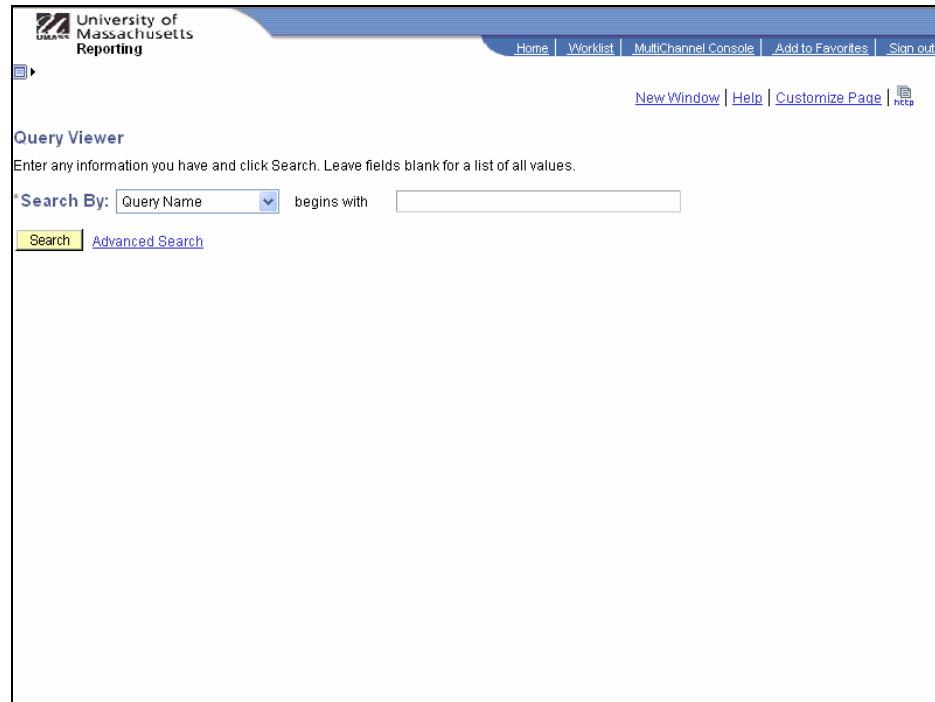


Report Center → Finance (or Grants) → Query Viewer

-or-

Reporting Tools → Query → Query Viewer

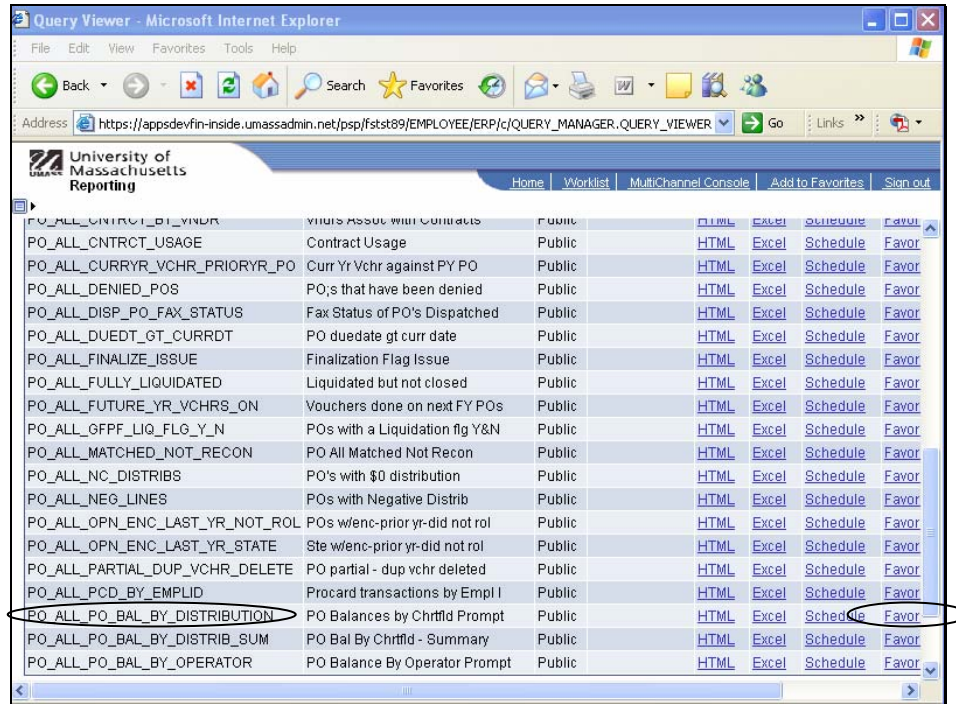




The screenshot shows a web application interface for the University of Massachusetts Reporting system. At the top, there is a navigation bar with links for Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. Below this, there are links for New Window, Help, and Customize Page. The main 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." There is a search form with a dropdown menu set to "Query Name" and a text input field labeled "begins with". Below 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 Favorites will be listed on the opening page of Query Viewer.



University of Massachusetts Reporting

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

New Window | Help | Customize Page | Help

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By: Query Name begins with

[Advanced Search](#)

My Favorite Queries Customize | Find | First 1 of 1 Last

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	<input type="button" value="-"/>

End Procedure

Last Edited Date	Dec. 22, 2006
Last Edited By	CG