

QUICK REFERENCE GUIDE

Query Basics: Getting Information from SWIFT

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Information can be retrieved directly from SWIFT using three different methods: reports, queries and inquiries. Data displayed using any of these methods is up-to-the-minute or “real-time” information. This guide introduces the terms and general steps for getting information from SWIFT using queries. For more detail on running queries, see [Query Viewer for All Modules](#).

Definitions

Inquiry: An online data lookup, delivered with PeopleSoft software, a.k.a. “canned” lookups. Geared to data in a specific SWIFT module, an inquiry features fields used to specify the needed data. SWIFT presents the results online as rows and columns of data.

Query: A customized data lookup created by SWIFT project team members specifically for State needs. These are accessed through the Query Viewer under the Reporting Tools menu and are named “M_XX” where XX is the module abbreviation: PO, AR, KK, SC, CM, etc. The resulting data may be viewed online or downloaded to Excel. You will not be able to drill down using the data presented online.

Report: A group of data gathered from SWIFT tables and presented in a format ready to be printed to paper. The data presented cannot be “drilled down.” Each SWIFT module contains a menu or submenus of available reports. Data may be saved and/or printed to several different file formats. Delivered with the original PeopleSoft software, a.k.a. “canned” reports.

Query Naming Convention

To use a query to retrieve data from SWIFT, you must know its name or a portion of its name.

The naming convention for State of Minnesota queries is as follows:

M_XX_GBL....

M stands for Minnesota, XX equals the two-letter SWIFT module abbreviation (e.g., AP for Accounts Payable), and GBL displays if all users have access to the query.

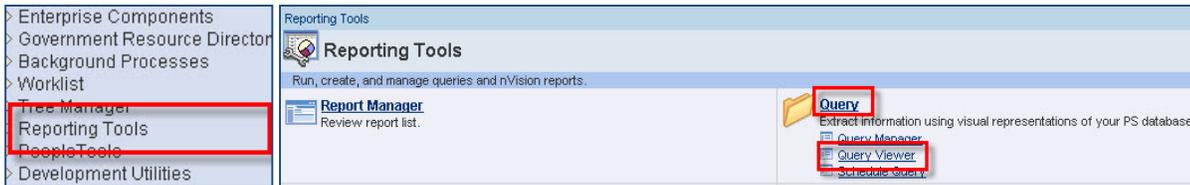
Example of a complete query name: M_AP_AGENCY_ORIGIN.

The characters that appear after XX_ or GBL_ describe the kind of data the query is set up to find. In the example above, this query shows the information associated with the **Agency Origin** field on the **Payments** tab of the **Voucher Regular Entry** page. **Agency Origin** contains the department name and phone number for questions about payments for that department. The query allows users to view what is currently recorded in SWIFT behind the **Agency Origin** field values for their agency.

How to Run Queries in SWIFT

Follow the steps below to look up SWIFT data using a query:

1. Access customized lookups through SWIFT's Main Menu: Reporting Tools, Query, Query Viewer.



The **Query Viewer** page displays.



TIP: If you type only **M_XX** (the two-digit abbreviation of the SWIFT module) and click **Search**, SWIFT displays all the queries in that module for which you have access.

2. Type the name of the query in the “begins with” field and click Search. Search results display below.



To work with data, select either the **Run to HTML** (a webpage) or **Run to Excel** hyperlink.

Click the **Run to HTML** hyperlink. A new tab opens showing parameter fields.



- In the **Unit** (Business Unit) field, type the Business Unit you want to view Agency Origins for and click the **View Results** button.

M_AP_AGENCY_ORIGIN

Unit: G0201

View Results

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (1 kb)

View All First

	Unit	Origin	Eff Date	Status	Descr	Phoi
1	G0201	BK	01/01/1901	A	ADMIN BOOKSTORE	651/297-3925
2	G0201	FS	01/01/1901	A	ADMIN FISCAL SERVICES	651/201-2534
3	G0201	MM	01/01/1901	A	ADMIN MATERIALS MANAGEMENT	651/201-2404
4	G0201	PM	01/01/1901	A	ADMIN PLANT MANAGEMENT	651/201-2315
5	G0201	RC	01/01/1901	A	ADMIN REAL EST & CONST SRV	651/201-2374
6	G0201	RM	01/01/1901	A	ADMIN RISK MANAGEMENT	651/201-2588
7	G0201	SO	01/01/1901	A	ADMIN SURPLUS OPERATIONS	651/639-4022
8	G0201	TM	01/01/1901	A	ADMIN FLEET SERVICES	651/201-2535
9	G0201	WC	01/01/1901	A	WORKERS COMPENSATION	651/201-3003

The Excel spreadsheet hyperlink above allows you to download the results to Excel.

- When you're finished with the information, close the tab.

★ Favorites Query Viewer https://fms.swift.state.m... X

M_AP_AGENCY_ORIGIN

Unit: G0201

View Results

The Query Viewer page re-displays.

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 M_AP_AGENCY_ORIGIN

Search [Advanced Search](#)

Search Results

*Folder View: -- All Folders --

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
M_AP_AGENCY_ORIGIN		Public		HTML	Excel	XML	Schedule	Favorite