

## **QUICK REFERENCE GUIDE**

### *Query Viewer Advanced – for All SWIFT Modules*

*Rvsd January 18, 2012*

#### **Query Viewer allows users to view the data entered into SWIFT tables**

You can use the PeopleSoft Query Viewer tool in the following ways:

- Run queries and have results sent to a separate browser window
- Download and format data as a Microsoft Excel spreadsheet and/or in an XML format. These options are available in your query search results after you run or schedule a query
- Schedule queries to run at predefined times or on recurring schedules. The results of scheduled queries are routed to your Report Manager

#### **Searching for Queries**

Query Viewer provides several fields that can be used to locate queries. You can search for a query using the basic or advanced search functions. The basic search enables you to search using only the “begins with” condition. **See Query Basics: Getting Information from SWIFT.** The advanced search enables you to search using one or more search by criteria and selecting from a choice of conditions for each search by criterion. The search criteria include:

- Access Group Name – PeopleSoft Query uses query access group trees to control security of the tables in your PeopleSoft database. Users can use access groups to retrieve queries that have records in specific access groups.
- Description – Description of Query
- Folder name – Folders are used to group queries, e.g., Dispatch, SS Awards and Vendors
- Owner – Public Queries or Private Queries
- Query Name – Name of Query
- Query Type – 99% of all queries are considered “User Queries.” Other types include queries associated with Archiving, Process and Roles
- Uses Field Name – Query contains a specific field such as PO\_ID or AUC\_ID
- Uses Record Name – Query uses a specific record such as PO\_HDR or AUC\_HDR

To search for a query perform the following steps:

1. Navigate to Reporting Tools, Query, Query Viewer.  
The Query Viewer page is displayed.
2. Click the **Advanced Search Criteria** hyperlink.  
The search criteria fields appear. Wildcards (%) can be used in any of the fields to further refine or broaden the search.
3. For this example, enter **PURCHASE ORDER** into the **Folder name** field.
4. Click the **search** button.  
Queries that are stored in the **PURCHASE ORDER** folder are returned in the **Search Results**.

## Financial Management System

Favorites | Main Menu > Reporting Tools > Query > Query Viewer

**Query Viewer**

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

Query Name:

Description:

Uses Record Name:

Uses Field Name:

Access Group Name:

Folder Name:

\*Query Type: =

Owner: =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL\_LN.

Search

Clear

[Basic Search](#)

### Query Viewer

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

Query Name:

Description:

Uses Record Name:

Uses Field Name:

Access Group Name:

Folder Name:

\*Query Type: =

Owner: =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL\_LN.

Search

Clear

[Basic Search](#)

**Search Results**

\*Folder View: -- All Folders --

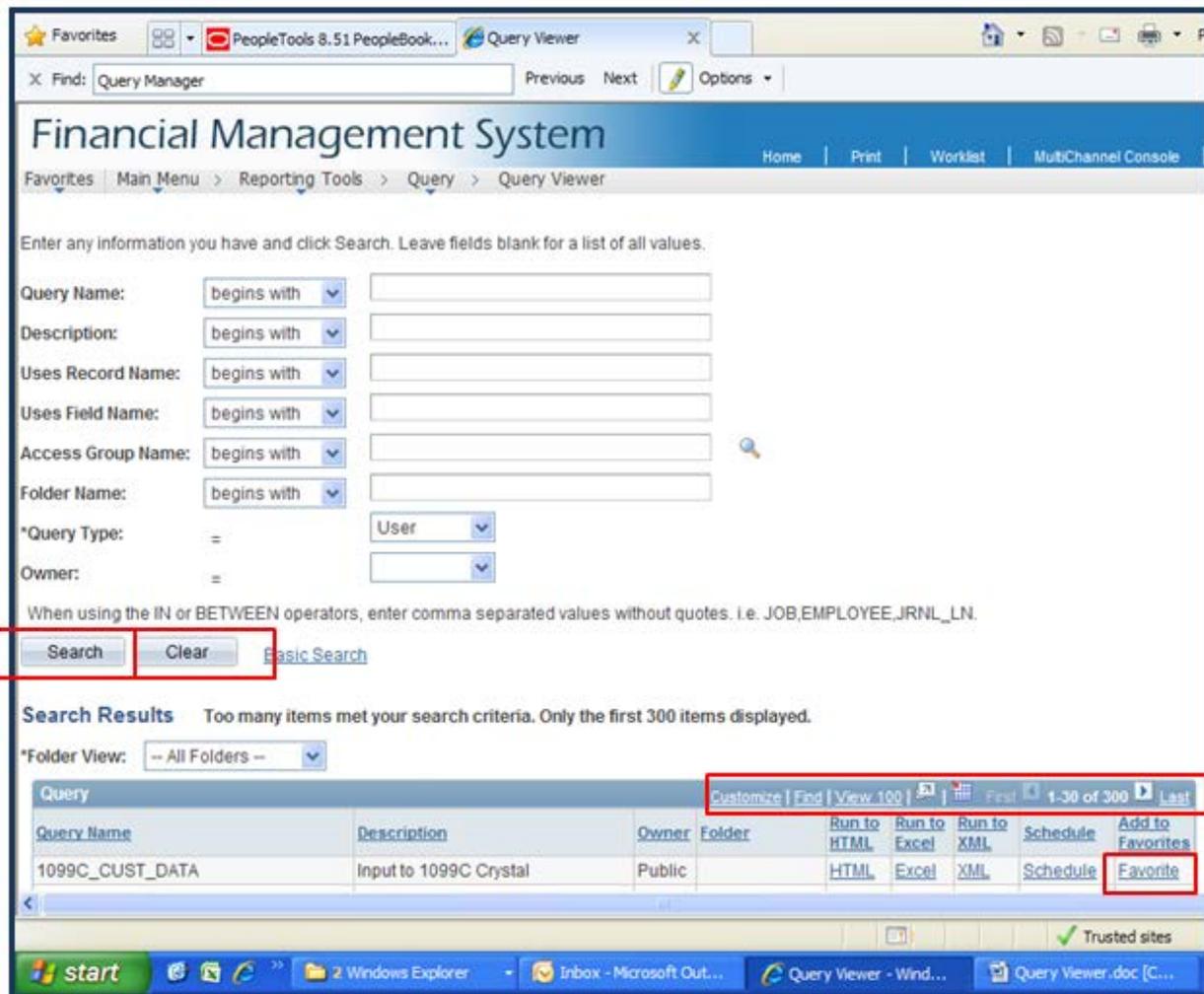
| Query                          | Description                   | Owner  | Folder         | Run to HTML          | Run to Excel          | Run to XML          | Schedule                 | Add to Favorites         |
|--------------------------------|-------------------------------|--------|----------------|----------------------|-----------------------|---------------------|--------------------------|--------------------------|
| M_PO_B2201_INTERFACE_POS       | DEED Interface POs by PO Date | Public | PURCHASE ORDER | <a href="#">HTML</a> | <a href="#">Excel</a> | <a href="#">XML</a> | <a href="#">Schedule</a> | <a href="#">Favorite</a> |
| M_PO_GBL_BUYERS_BY_AGENCY      | Active Buyers By Agency       | Public | PURCHASE ORDER | <a href="#">HTML</a> | <a href="#">Excel</a> | <a href="#">XML</a> | <a href="#">Schedule</a> | <a href="#">Favorite</a> |
| M_PO_GBL_BUYER_WORKLOAD        | Buyer Workload                | Public | PURCHASE ORDER | <a href="#">HTML</a> | <a href="#">Excel</a> | <a href="#">XML</a> | <a href="#">Schedule</a> | <a href="#">Favorite</a> |
| M_PO_GBL_CANCELLED_POS_W_ENCUM | Cancelled POs with Open Encum | Public | PURCHASE ORDER | <a href="#">HTML</a> | <a href="#">Excel</a> | <a href="#">XML</a> | <a href="#">Schedule</a> | <a href="#">Favorite</a> |
| M_PO_GBL_CATEGORY_DEFAULTS     | UNSPSC Category Defaults      | Public | PURCHASE ORDER | <a href="#">HTML</a> | <a href="#">Excel</a> | <a href="#">XML</a> | <a href="#">Schedule</a> | <a href="#">Favorite</a> |
| M_PO_GBL_CONVERTED_POS         | Converted Purchase Orders     | Public | PURCHASE ORDER | <a href="#">HTML</a> | <a href="#">Excel</a> | <a href="#">XML</a> | <a href="#">Schedule</a> | <a href="#">Favorite</a> |
| M_PO_GBL_DBA_NAME              | Search for Vendor by DBA Name | Public | PURCHASE ORDER | <a href="#">HTML</a> | <a href="#">Excel</a> | <a href="#">XML</a> | <a href="#">Schedule</a> | <a href="#">Favorite</a> |

- Click the **Clear** button to remove the search criteria.
- Click the **Search** button to retrieve all queries stored in SWIFT. Queries that you have identified as a "Favorite" will appear at the bottom of the page in a section labeled "**My Favorite Queries.**"

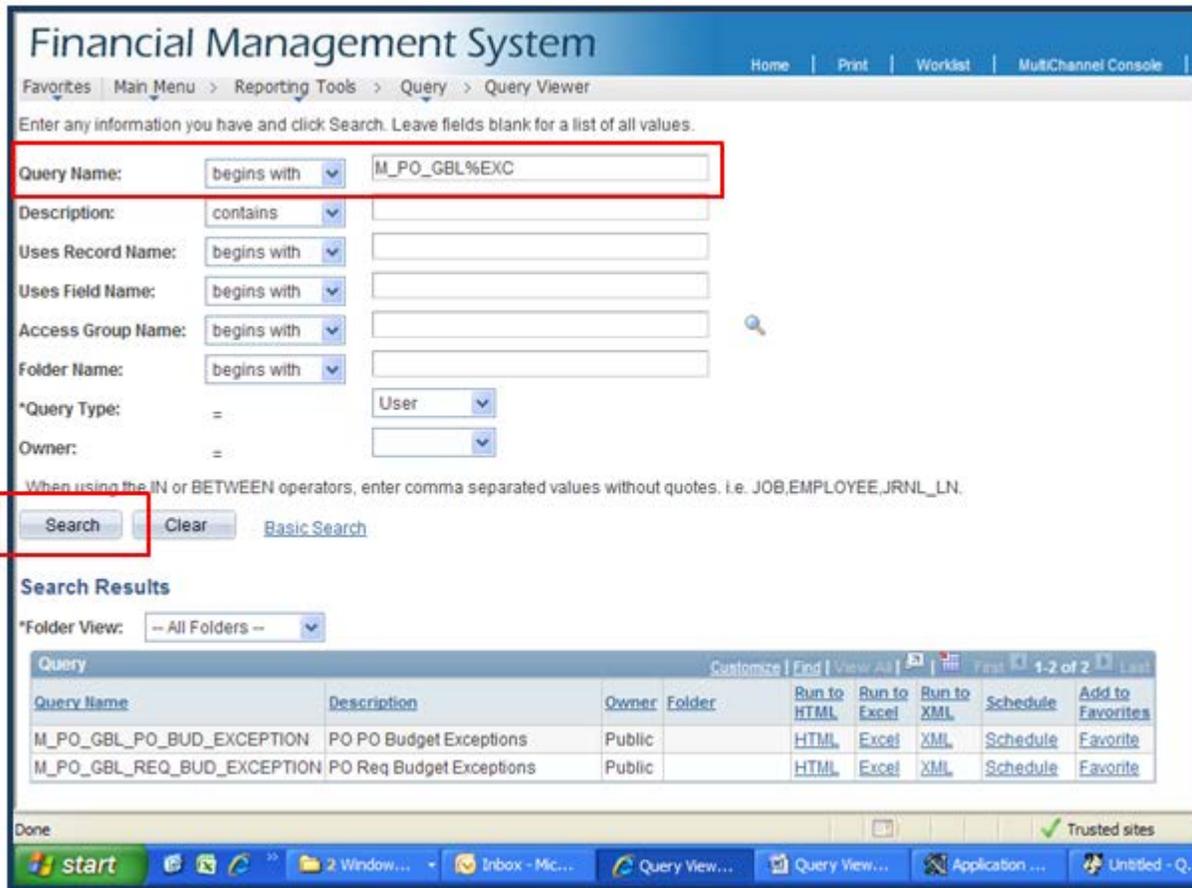
By default, only the first 30 queries appear on the page. To see more of the list, click the navigation buttons and links located on the header bar.



To display 100 of the queries, select View 100 and use the scroll-bar to view the remainder of the list.



- In the **Query Name** Field enter M\_PO\_GBL%EXC to narrow the search even further.
- Click the **Search** button to search only for those queries that begin with M\_PO\_GBL and contain EXC in the remainder of the name.



## Running Queries

You can run a predefined query from your browser and view it online. When you run a query, PeopleSoft Query displays the results in a new browser window. This run option is useful if you want to run multiple queries or run the same query multiple times with different runtime prompt values and compare the results of the queries.

PeopleSoft provides three (3) methods for running queries:

- HTML – Preview queries by displaying the result set in a grid for review. Once you have captured the results you have the opportunity to download to Excel, CSV or XML.
- Excel – Download and format data as a Microsoft Excel spreadsheet.
- XML – Download and format data to XML

### A. Running Query to HTML

1. Navigate to Reporting Tools, Query, Query Viewer

The Query Viewer page is displayed.

2. Enter “M\_PO\_GBL” into the “begins with” field to search only for queries beginning with “M\_PO\_GBL”

3. Click the **Search** button. The search results will display the queries that match your criteria.

4. Click the **HTML** link for the query you want to run. For the example below we are using M\_PO\_GBL\_DBA\_NAME.

**Query Viewer**

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

\* Search By: Query Name  M\_PO\_GBL

[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_PO_GBL_BUYERS_BY_AGENCY      | Active Buyers By Agency       | Public | PURCHASE ORDER | <a href="#">HTML</a> | <a href="#">Excel</a> | <a href="#">XML</a> | <a href="#">Schedule</a> | <a href="#">Favorite</a> |
| M_PO_GBL_BUYER_WORKLOAD        | Buyer Workload                | Public | PURCHASE ORDER | <a href="#">HTML</a> | <a href="#">Excel</a> | <a href="#">XML</a> | <a href="#">Schedule</a> | <a href="#">Favorite</a> |
| M_PO_GBL_CANCELLED_POS_W_ENCUM | Cancelled POs with Open Encum | Public | PURCHASE ORDER | <a href="#">HTML</a> | <a href="#">Excel</a> | <a href="#">XML</a> | <a href="#">Schedule</a> | <a href="#">Favorite</a> |
| M_PO_GBL_CATEGORY_DEFAULTS     | UNSPSC Category Defaults      | Public | PURCHASE ORDER | <a href="#">HTML</a> | <a href="#">Excel</a> | <a href="#">XML</a> | <a href="#">Schedule</a> | <a href="#">Favorite</a> |
| M_PO_GBL_CONVERTED_POS         | Converted Purchase Orders     | Public | PURCHASE ORDER | <a href="#">HTML</a> | <a href="#">Excel</a> | <a href="#">XML</a> | <a href="#">Schedule</a> | <a href="#">Favorite</a> |

PeopleSoft will open a new window with the results of the query. If the query contains prompts then you will need to enter criteria.

Query Viewer | https://fms.swift.state.m... X

M\_PO\_GBL\_DBA\_NAME - Search for Vendor by DBA Name

DBA Name (Use % as wild card):

| DBA Name | Vendor | Addr Seq Num | Eff Date | Email ID | Address 1 | Address 2 | City | State | Postal Code | Vendor Name 1 |
|----------|--------|--------------|----------|----------|-----------|-----------|------|-------|-------------|---------------|
|----------|--------|--------------|----------|----------|-----------|-----------|------|-------|-------------|---------------|

- In the example, enter **%MANUFACTURING%** in the DBA Name field. Adding “%” on both ends of the word will tell the system to find MANUFACTURING anywhere in the name.
- Click the **View Results** button to initiate the search.

M\_PO\_GBL\_DBA\_NAME - Search for Vendor by DBA Name

DBA Name (Use % as wild card):

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (104 kb)

View All | First 1-100 of 152 | Last

|    | DBA Name                       | Vendor     | Addr Seq Num | Eff Date   | Email ID                   | Address 1             | Address 2          | City        | State | Postal Code | Vendor Name 1                  |
|----|--------------------------------|------------|--------------|------------|----------------------------|-----------------------|--------------------|-------------|-------|-------------|--------------------------------|
| 1  | GLOBE TRAILER MANUFACTURING    | 0000347045 | 1            | 01/01/1901 | SALES@GLOBETRAILERS.COM    | 3101 59TH AVE DR E    |                    | BRADENTON   | FL    | 34203       | GLOBE TRAILER MANUFACTURING    |
| 2  | KURT MANUFACTURING             | 0000322173 | 1            | 01/01/1901 |                            | 5280 MAIN ST NE       |                    | MPLS        | MIN   | 55421       | KURT MANUFACTURING             |
| 3  | W & W MANUFACTURING CO         | 0000293754 | 1            | 01/01/1901 | SBARONE7@GMAIL.COM         | 800 S BROADWAY        |                    | HICKSVILLE  | NY    | 11801       | W & W MANUFACTURING CO         |
| 4  | REEVES MANUFACTURING GROUP THE | 0000248655 | 1            | 01/01/1901 | MSW@REEVESDECON.COM        | 1704 W 7TH ST         |                    | FREDERICK   | MD    | 21702       | REEVES MANUFACTURING GROUP THE |
| 5  | C & B MANUFACTURING INC        | 0000336813 | 1            | 01/01/1901 |                            | 131 COUNTY RD 34 E    |                    | JACKSON     | MIN   | 56143       | C & B MANUFACTURING INC        |
| 6  | WALDALE MANUFACTURING LTD      | 0000242429 | 2            | 05/03/2011 |                            | 17 TANTRAMAR CRESCENT | AMHERST NS B4H-4J6 | CANADA      |       |             | WALDALE MANUFACTURING LTD      |
| 7  | WALDALE MANUFACTURING LTD      | 0000242429 | 1            | 01/01/1901 | NIKI@WALDALE.COM           | 17 TANTRAMAR CRESCENT |                    | AMHERST     |       | B4H 4J6     | WALDALE MANUFACTURING LTD      |
| 8  | A & A MANUFACTURING CO INC     | 0000267627 | 1            | 01/01/1901 | SALES@GORTITE.COM          | 2300 S CALHOUN RD     |                    | NEW BERLIN  | WI    | 53151-0847  | A & A MANUFACTURING CO INC     |
| 9  | GHEHT MANUFACTURING INC        | 0000389186 | 1            | 01/01/1901 | JANE@CARTWRITE.COM         | 2999 HENKLE DR        |                    | LEBANON     | OH    | 45036       | GHEHT MANUFACTURING INC        |
| 10 | ROTONICS MANUFACTURING         | 0000301732 | 2            | 01/01/1901 | DEBBIE.HARPER@ROTONICS.COM | 5370 W HIGHWAY 12     |                    | MAPLE PLAIN | MIN   | 55359       | ROTONICS MANUFACTURING INC     |

You can refine your search by altering the criteria and then clicking the View Results button again.

7. Enter **%MANUFACTURING** into the DBA Name field.
8. Click the **View Results** button. The returned records will now contain only those vendors where their name ends with MANUFACTURING.

M\_PO\_GBL\_DBA\_NAME - Search for Vendor by DBA Name

DBA Name (Use % as wild card): %MANUFACTURING

[View Results](#)

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (28 kb)

View All First 1-42 of 42 Last

|    | DBA Name                       | Vendor     | Addr Seq Num | Eff Date   | Email ID                        | Address 1             | Address 2            | City            | State | Postal Code | Vendor Name 1                  |
|----|--------------------------------|------------|--------------|------------|---------------------------------|-----------------------|----------------------|-----------------|-------|-------------|--------------------------------|
| 1  | GLOBE TRAILER MANUFACTURING    | 0000347045 | 1            | 01/01/1901 | SALES@GLOBETRAILERS.COM         | 3101 59TH AVE DR E    |                      | BRADENTON       | FL    | 34203       | GLOBE TRAILER MANUFACTURING    |
| 2  | KURT MANUFACTURING             | 0000322173 | 1            | 01/01/1901 |                                 | 5280 MAIN ST NE       |                      | MPLS            | MN    | 55421       | KURT MANUFACTURING             |
| 3  | ROTONICS MANUFACTURING         | 0000301732 | 2            | 01/01/1901 | DEBBIE.HARPER@ROTONICS.COM      | 5370 W HIGHWAY 12     |                      | MAPLE PLAIN     | MN    | 55359       | ROTONICS MANUFACTURING INC     |
| 4  | BOWMAN MANUFACTURING           | 0000309992 | 1            | 01/01/1901 | HEATHER@BOWMANMFG.COM           | 17301 51ST AVE NE     |                      | ARLINGTON       | WA    | 98223       | BOWMAN MANUFACTURING           |
| 5  | POLLUX MANUFACTURING           | 0000294273 | 1            | 01/01/1901 |                                 | 650 TAFT ST NE        |                      | MPLS            | MN    | 55418       | POLLUX MANUFACTURING           |
| 6  | JOKO MANUFACTURING             | 0000353778 | 1            | 01/01/1901 |                                 | 61938 HWY 28          |                      | CHOKIO          | MN    | 56221-2010  | JOKO MANUFACTURING             |
| 7  | B & H MANUFACTURING            | 0000287648 | 1            | 01/01/1901 |                                 | 141 COUNTRY RD 34 E   |                      | JACKSON         | MN    | 56143       | B & H MANUFACTURING            |
| 8  | METAL MARKER MANUFACTURING     | 0000324742 | 1            | 01/01/1901 | DOUG.CARSON@METALMARKERMFG.COM  | 6225 LEAR NAGLE RD    |                      | NORTH RIDGEVILL | OH    | 44039       | METAL MARKER MANUFACTURING     |
| 9  | OBRIEN MANUFACTURING           | 0000242877 | 1            | 01/01/1901 | SALES@OBRIENMFG.COM             | 7346 W 400TH N        | PO BOX 7             | LEITERS FORD    | IN    | 46945       | OBRIEN MANUFACTURING           |
| 10 | CENTRAL CANVAS MANUFACTURING   | 0000347851 | 1            | 01/01/1901 | TJCCMI@CLEARWIRE.NET            | 636 19TH AVE NE       | PO BOX 637           | ST JOSEPH       | MN    | 56374-4630  | CENTRAL CANVAS MANUFACTURING   |
| 11 | LAKEWOOD MANUFACTURING         | 0000310596 | 1            | 01/01/1901 | TORI@LAKEWOOD-MANUFACTURING.COM | 1241 NEW WINDSOR ROAD |                      | WESTMINSTER     | MD    | 21158       | LAKEWOOD MANUFACTURING         |
| 12 | K & R MANUFACTURING            | 0000255751 | 1            | 06/01/2011 | SALES@KRMFG.COM                 | PO BOX 3670           | 1423 S BUSINESS RT 5 | CAMDENTON       | MO    | 65020       | K & R MANUFACTURING            |
| 13 | ARESCO MANUFACTURING           | 0000339058 | 1            | 01/01/1901 | CONTACT@ARESCOONLINE.COM        | 27 NW 3RD AVE         |                      | HALLANDALE BCH  | FL    | 33009       | ARESCO MANUFACTURING           |
| 14 | BROOKVILLE GLOVE MANUFACTURING | 0000250051 | 1            | 01/01/1901 | TWELSH@BROOKVILLEGLOVE.COM      | 5-15 WESTERN AVE      |                      | BROOKVILLE      | PA    | 15825       | BROOKVILLE GLOVE MANUFACTURING |
| 15 | PRO MANUFACTURING              | 0000339597 | 1            | 01/01/1901 |                                 | 77917 209TH ST        |                      | ALBERT LEA      | MN    | 56007       | PRO MANUFACTURING              |

If there are more results than what appears you can utilize the First, Last and the arrow buttons to review the other results. The Last link will retrieve the last set of results. The arrows can be used to cycle to the next set of results.

**B. Running Query Results to Excel**

Two methods can be used to download the result to Excel:

- You can send HTML results to Excel by selecting the **Excel Spreadsheet** link located on the HTML page. See (Running Queries to HTML).
- You can run the query from the search results page by selecting the Excel link.

Running query results to Excel from the HTML results page:

1. Click the Excel Spreadsheet link located on the HTML results page.  
The file Download window should appear.

M\_PO\_GBL\_DBA\_NAME - Search for Vendor by DBA Name

DBA Name (Use % as wild card): %MANUFACTURING

View Results

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (28 kb)

View All First 1-42 of 42 Last

|    | DBA Name                     | Vendor     | Addr Seq Num | Eff Date   | Email ID                        | Address 1             | Address 2            | City            | State | Postal Code | Vendor Name 1                |
|----|------------------------------|------------|--------------|------------|---------------------------------|-----------------------|----------------------|-----------------|-------|-------------|------------------------------|
| 1  | GLOBE TRAILER MANUFACTURING  | 0000347045 | 1            | 01/01/1901 | SALES@GLOBETR                   |                       |                      | ENTON           | FL    | 34203       | GLOBE TRAILER MANUFACTURING  |
| 2  | KURT MANUFACTURING           | 0000322173 | 1            | 01/01/1901 |                                 |                       |                      |                 | MIN   | 55421       | KURT MANUFACTURING           |
| 3  | ROTONICS MANUFACTURING       | 0000301732 | 2            | 01/01/1901 | DEBBIE.HARPER@                  |                       |                      | E PLAIN         | MIN   | 55359       | ROTONICS MANUFACTURING INC   |
| 4  | BOWMAN MANUFACTURING         | 0000309992 | 1            | 01/01/1901 | HEATHER@BOWM                    |                       |                      | GTON            | WA    | 98223       | BOWMAN MANUFACTURING         |
| 5  | POLLUX MANUFACTURING         | 0000294273 | 1            | 01/01/1901 |                                 |                       |                      |                 | MIN   | 55418       | POLLUX MANUFACTURING         |
| 6  | JOKO MANUFACTURING           | 0000353778 | 1            | 01/01/1901 |                                 |                       |                      | JO              | MIN   | 55221-2010  | JOKO MANUFACTURING           |
| 7  | B & H MANUFACTURING          | 0000287648 | 1            | 01/01/1901 |                                 |                       |                      | SON             | MIN   | 55143       | B & H MANUFACTURING          |
| 8  | METAL MARKER MANUFACTURING   | 0000324742 | 1            | 01/01/1901 | DOUG.CARSON@METALMARKERMFG.COM  | 6225 LEAR NAGLE RD    |                      | NORTH RIDGEVILL | OH    | 44039       | METAL MARKER MANUFACTURING   |
| 9  | OBRIEN MANUFACTURING         | 0000242877 | 1            | 01/01/1901 | SALES@OBRIENMFG.COM             | 7346 W 400TH N        | PO BOX 7             | LEITERS FORD    | IN    | 46945       | OBRIEN MANUFACTURING         |
| 10 | CENTRAL CANVAS MANUFACTURING | 0000347851 | 1            | 01/01/1901 | TJCCMI@CLEARWIRE.NET            | 636 19TH AVE NE       | PO BOX 637           | ST JOSEPH       | MIN   | 55374-4630  | CENTRAL CANVAS MANUFACTURING |
| 11 | LAKEWOOD MANUFACTURING       | 0000310596 | 1            | 01/01/1901 | TORI@LAKEWOOD-MANUFACTURING.COM | 1241 NEW WINDSOR ROAD |                      | WESTMINSTER     | MD    | 21158       | LAKEWOOD MANUFACTURING       |
| 12 | K & R MANUFACTURING          | 0000255751 | 1            | 06/01/2011 | SALES@KRMFG.COM                 | PO BOX 3670           | 1423 S BUSINESS RT 5 | CAMDENTON       | MO    | 65020       | K & R MANUFACTURING          |

**File Download**

Do you want to open or save this file?

Name: q.xls  
 Type: Microsoft Excel 97-2003 Worksheet, 19.9kB  
 From: fms.swift.state.mn.us

Always ask before opening this type of file

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

2. Click the **Open** button.
3. The results will open in Excel.

### C. Running Query Results to XML

XML (Extensible Markup Language) is a language that defines a set of rules for encoding documents in a readable format for people and machines. XML most likely will be used by software and system developers; therefore, it is not covered in this QRG.