

## QUICK REFERENCE GUIDE

Updated November 01, 2019

### Query Basics

There are three methods to look up procurement and financial information in SWIFT.

- **Inquiries:** Search for data associated with fields on a page (e.g., search for a particular voucher on the voucher page).
- **Queries:** Perform a customized search for data within a module (e.g., search for DBA names in the Supplier module).
- **Reports:** Review processing details on individual transactions or batch processes (e.g., review the budget checking status of vouchers).

This Quick Reference Guide shows how to run queries in SWIFT to perform customized searches for information in a particular module. Queries are located under the Reporting Tools Menu.

### Query Naming Conventions

To run a query in SWIFT, you will need to know the naming convention for the query. Naming conventions for queries use the following abbreviations:

- **M** stands for Minnesota. All naming conventions begin with this letter.
- **XX** or **XXX** is the two- or three-letter abbreviation of a SWIFT module (e.g., **AP** = Accounts Payable, **VND** = Vendor module)
- **GBL** stands for global.
- Use the underscore symbol (**\_**) between these parts of the query.

### Run a Query

- Step 1: Open a query using the Query Viewer.
- Step 2: Run a query and view the search results.

#### Step 1: Open a query using the Query Viewer.

1. Navigate to the *Query Viewer* page.

Navigation Option	Navigation Path
NavBar	Navigator, SWIFT, Reporting Tools, Query, Query Viewer.

2. The *Query Viewer* page will display. From the *Search By* field, select the “Query Name” option.
3. In the *begins with* field, enter the naming convention for the query you want to run.

Naming conventions for queries begin with “**M\_XX**” to abbreviate the following information:

- **M** = Minnesota – always start with this letter
- **XX** = abbreviation of SWIFT module (e.g., **AP** = Accounts Payable, **VND** = Vendor module)

**Note:** If you only type the “**M\_XX**” abbreviation, SWIFT will open all the queries in that module.

4. Press the **Search** button. A list of *Search Results* for queries will display below the *Query* section. The Search Results show the queries available for the particular module.
5. To open a particular query, select either the *HTML* link (to display the search results in a browser tab or window) or the *Excel* link (to display the search results in an Excel spreadsheet).

**Query Viewer**

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

\*Search By  begins with

**Search Results**

\*Folder View

**Query**

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
M_VND_CAT_INCTV_LIST	Vendor with Inactive Category	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
M_VND_CAT_LIST	Categories a Vendor selected	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
M_VND_CAT_LIST_BY_CAT	Categories a Vendor selected	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
M_VND_EFT_LAYOUT_CODE_2		Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
M_VND_GBL_AUDIT_BANK	Audit Vendor Bank History	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
M_VND_GBL_AUDIT_LOCATION	Audit Vendor Location	Public	AP_GBL	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
M_VND_GBL_AUDIT_VENDOR	Audit Vendor Header Fields	Public	AP_GBL	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
M_VND_GBL_DBA_NAME	Search for Vendor by DBA Name	Public		<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>
M_VND_GBL_EPC_C	Equal Pay Certified Vendors	Public	AP_GBL	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>	<a href="#">Lookup References</a>	<a href="#">Favorite</a>

## Step 2: Run a query and view the search results.

1. The query window will open. In the open field, type the search criteria.

**Hint:** You may use the wildcard symbol (%) as a placeholder for unknown information.

2. Press the **View Results** button. A list of search results will display.

**Note:** Query results will display in another window if you selected *HTML*, or they will open in an Excel spreadsheet if you selected *Excel*. Opening the query in Excel allows you to sort and filter the query results by column.

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

DBA Name (Use % as wild card)

Row	DBA Name	Additional	Supplier	Addr Seq Num	Eff Date	Email ID	Address 1	Address 2	City	State	Postal Code	Vendor Name 1
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