

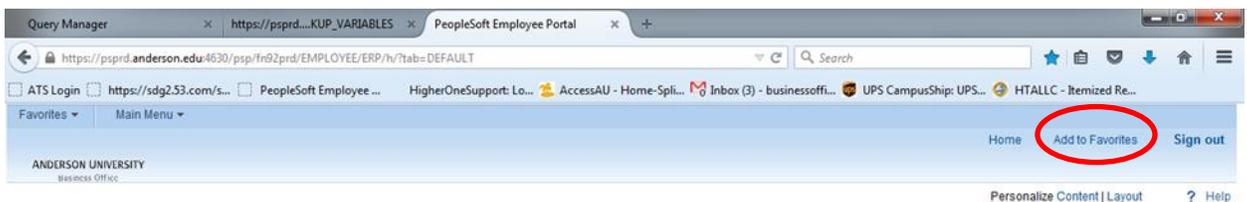
QUERY VIEWER INSTRUCTIONS

An alternative to accessing reports through Report Manager is to use Query Viewer. While information will be delivered in a different format, all information included on Report Manager can be accessed through Query Viewer.

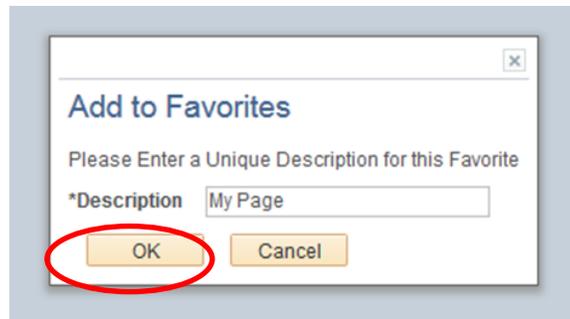
As a budget user, you can access six different queries to get details regarding the status of various budget items. Each query is described in more detail below. Follow the steps below to access this new feature.

HOW TO SAVE QUERY VIEWER AS 'FAVORITES'

1. Sign in to finance.anderson.edu
2. Navigate to Main Menu > Reporting Tools > Query > Query Viewer
 - a. Select "Add to Favorites"



- b. Select "OK" once the pop-up box appears.



- c. Select "OK" when the pop-up box below appears.



- d. Query Viewer is now saved as one of your "Favorites." This step only needs to be completed on your initial login to finance.anderson.edu. In the future, you can access Query Viewer directly from your Menu Bar on the Homepage screen simply by selecting "Favorites" at the top far left on your screen.

HOW TO SAVE QUERIES IN QUERY VIEWER AS 'FAVORITES'

1. Select 'Query Viewer' located by selecting 'Favorites' in the Menu Bar located at the top of your Homepage screen.
2. Enter 'MY_DEPARTMENTS' in the search box and hit the 'Search' button.

Query Viewer

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

*Search By begins with

[Advanced Search](#)

3. The search results should look as shown below. Select 'Favorite.'

Query Viewer

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

*Search By begins with

[Advanced Search](#)

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
MY_DEPARTMENTS	Budget Lookup Access by User	Public	AU BUDGET USER	HTML	Excel	XML	Schedule	Lookup References	Favorite

4. The MY_DEPARTMENTS query should now be displayed in the box labeled 'My Favorite Queries.'

My Favorite Queries									
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Remove

5. Repeat the steps above to add the additional five queries as 'Favorites.'
 - a. BUDGET_LOOKUP
 - b. BUDGET_LOOKUP_VARIABLES_ONLY
 - c. ENCUMBRANCE_PO_DETAIL
 - d. ACTUALS_TRANSACTION_DETAIL
 - e. BUDGET_ONLY_DETAIL
6. Once queries are saved as 'Favorites' they will automatically show up when you open Query Viewer. Note: The system will put all queries in alphabetical order.

USING QUERY VIEWER

Query Viewer allows you two primary options to access data: HTML and Excel.

Query				Personalize	Find	View All	First	1 of 1	Last
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
MY_DEPARTMENTS	Budget Lookup Access by User	Public	AU BUDGET USER	HTML	Excel	XML	Schedule	Lookup References	Favorite

1. **Excel** – This option allows users to sort, subtotal, and organize data to their preference. Query results will automatically open in an Excel workbook.

Once query results are in Excel, you will be able to format and save the spreadsheet for future use.

2. **HTML** – This allows a user to view query results as a separate tab on the web browser. Should you decide after seeing the query results you would prefer to have them in Excel, you can click the **Excel Spreadsheet** hyperlink.

It is recommended to use the HTML when you only want to view data. If you want to save the information, sort, add, or do any other manipulation of the data, Excel will be the better option.

- **HELPFUL TIPS**

- Some queries will prompt you to enter a department number, account number, or fiscal year. If you want to pull ALL accounts for a specific department, enter % for 'Account.'
- Query prompts for "Year" are for fiscal years. For instance, to pull information for the 2016-2017 academic year, enter **2017**. You can pull budget information dating back to fiscal year 2009 (academic year 2008-2009).
- You will only be able to run queries for departments you have been given access. Should you receive an error, double check to ensure the department number has been entered correctly.

QUERY DESCRIPTIONS

- **MY_DEPARTMENTS**

This query will show you which department budgets you have access to view.

****NOTE FOR BUDGET DIRECTORS**** This query shows the user names of every user available to view a budget. Please review to ensure the necessary personnel in your area has appropriate access. If any user should be added or removed, please contact Randy Coppess, racoppess@anderson.edu.

Also, just because someone has access to view a budget does not mean they have the authority to sign approving expenses. To verify who has signing authority for a specific budget, again, please contact Randy Coppess.

- **BUDGET_LOOKUP**

This query pulls all budget information for a specific department. Once you select HTML or Excel, you will be prompted to enter in a department number, account number and fiscal year.

The results will show the cumulative fiscal year amounts budgeted, actual spent, encumbered, and total remaining balance for each account line. The budgeted, actual and encumbered amounts will be hyperlinked. If you click on a number, the system will open a new tab on your web browser with detailed line items comprising the total.

The screenshot shows a web form titled "AU_BUDGET_LOOKUP - Budget Lookup". It contains three input fields: "Department ID", "Account Number", and "Fiscal Year". The "Fiscal Year" field has the value "0" entered. Below the input fields is a "View Results" button. A table header is visible below the button, with columns for "Year", "Manager", "Descr", and "Dept".

Annotations with red boxes and arrows point to the input fields:

- A box pointing to the "Department ID" field contains the text: "Enter department number".
- A box pointing to the "Account Number" field contains the text: "Enter specific account or % if you want ALL accounts for noted department.".
- A box pointing to the "Fiscal Year" field contains the text: "Enter fiscal year. For academic year 2016-2017, enter **2017**."

- **BUDGET_LOOKUP_VARIABLES_ONLY**

This query is similar to BUDGET_LOOKUP; however, it only pulls a department's variable budgets.

- **ACTUALS_TRANSACTION_DETAIL**

Use this query to pull actual income/expenditure details. You will be prompted to enter in 'Year,' 'Dept,' and 'Account.' Again, if you want to see all activity within a department, enter % for 'Account.'

- **BUDGET_ONLY_DETAIL**

If you need to see budgetary information only, you can use this query. You will be prompted to enter 'Budget Period,' which is the same period as our fiscal year. So if you want 2016-2017 information, enter **2017**.

- **ENCUMBRANCE_PO_DETAIL**

This query allows you to review details regarding departmental purchase orders. This query will note the vendor's name, purchase order number, account charged, additional descriptive detail, and amount.

ENCUMBRANCE_PO_DETAIL - Encumbrance PO Detail by User

PO No.
Dept
Account
Year

To pull ALL PO information for a specific department, enter prompt information as displayed.

PO No.	Tran Date	Acctg Date	Year	Budget Period	D
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