Creating Basic Queries

Step	Action
1.	Click the **Reporting Tools** link. ▷ Reporting Tools
2.	Click the **Query** link. Query
3.	Click the **Query Manager** link. Query Manager
4.	Click the **Create New Query** link. This will take you to the **Records** tab so that you can choose the base table with which to start. When working with queries, "**tables**" are identified as "**records**." Create New Query
5.	**Note:** If you click on the **Search** button without entering search criteria, you will only get back the first 300 records (tables) in the database. (You will not get past the A's). You can perform partial searches by entering part of a record (table) name or description in the **Search For** field. Use the drop down options to select more criteria (name or description). **Advanced Search** is also available and provides additional search options. **Hint:** The logical operator ***"contains"*** acts like a wild card and is very helpful in locating a record or existing query.
6.	A good source for the table names is the **Data Dictionary Keyword Search** at **http://www.smu.edu/intranet/des/sr_QP/default.asp**. This is a secured webpage and requires a valid SMU ID and password. **Note:** If you are unsure of the table name, you should contact a functional expert who can give you the correct table name. DO NOT guess. If you have the wrong table, your query may not be accurate.
7.	Enter the desired **Record Name** into the **begins with** field.
8.	Click the **Search** button. Search
9.	As you review the list of tables, you can use the "**Show Fields**" link to preview the fields contained in the table before adding the table to your query. Click the **Add Record** link of the desired table. Add Record

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10.	The **Query Tab** will display all the fields contained in the table. Click the checkbox next to the fields you want to display in the query results or you can click the **Check All** button to display all the fields in the query results. **Hint:** If you want the majority of the fields to display in the query results, click the **Check All** button then uncheck the fields you do not want to display. Check All
11.	Click the **Fields** tab. Fields
12.	If you decide you don't need all the fields, you can delete a field by clicking on the **Delete** button on that row.
13.	The fields you selected to delete have been removed and will not appear in the Query results. At this point it is a good idea to save your query before you add criteria or formatting. Saving the Query Click the **Save** button. Save
14.	Type your desired query name into the **Query** field. Enter the name for the new query. Allows up to 30 characters. All queries you create should begin with "U_". A second node should identify your functional area/module, school, department, etc: "U_SR_", "U_GCOX_", U_MLS_", "U_ARTS_", etc. The remaining characters may be descriptive: "U_THEO_ENROLLED", "U_LAW_ENRLD_ADDR", etc. To easily identify your public queries, you can include your initials after "U_<functional area>_". You CANNOT use spacing, you MUST use underscores.
15.	Enter the desired information into the **Description** field. Allows up to 30 characters.
16.	For **Query Type**, leave as "User." **Query Owner**: Select from the following in the drop down box: **Public:** Any user with access to the records used by the query can run, modify or delete the query. **Note:** Queries that support a business procedure should be labeled public, for others to be able to run them in the future. **Private:** Only the user ID that created the query can open, run, modify or delete the query.
17.	Click the **OK** button. OK

Step	Action
18.	Click the **Run** tab. Run
19.	The query results are displayed on the screen. To download the query results to **Excel**, click the **Download to Excel** link. **NOTE:** If you have a pop-up blocker turned on, you will need to hold down the **CTRL key** on your keyboard (temporarily overrides any pop-up blocker software) and click the **Download to Excel** link. Continue to hold down **the CTRL key** until you see that the Excel application has been launched. Download to Excel
20.	**End of Procedure.**