Downloading Query Results

Step	Action
1.	Begin by navigating to the **Query Viewer** search page. Click the right scrollbar.
2.	Click the **Reporting Tools** link. ▷ Reporting Tools
3.	Click the **Query** link. Query
4.	Click the **Query Viewer** link. Query Viewer
5.	Use a keyword to search for the **Sold To Customers** query. Click in the **begins with** field.
6.	Enter the desired information into the **begins with** field. For this simulation, enter a valid value e.g. "**OMC3210**".
7.	Click the **Search** button. Search
8.	SMART lets you run a query right to Excel from the **Search Results**. When you click the **Excel** link, a new window appears that lets you choose to open or save your query results. Click the **Excel** link. Excel
9.	Sometimes, you may need to enter one or more parameters. In this simulation, you need to enter a **SetID**. Click in the **SetID** field.
10.	For tables shared across agencies, the SetID will be "SOKID". For tables unique to your agency, the SetID will be the same as the Business Unit. Enter the desired information into the **SetID** field. For this simulation, enter a valid value e.g. "**SOKID**".

Step	Action
11.	Click the **View Results** button. View Results
12.	The **File Download** window appears and gives you the option of opening or saving your query results. Click the **Save** button. Save
13.	Choose a location on your computer or network drive to save your Excel file. You can also choose to use the default file name or create your own. For this simulation, save the file to the **Desktop** with the default file name. Click the **Save** button. Save
14.	When the download is complete, you can open the Excel file, open the folder where you saved the file, or close the **Download Complete** window. Click the **Open** button. Open
15.	The Excel file opens in a new window where you can view, format, summarize, and transfer your **Search Results**. When you are finished, close the file and Excel. Click the **Close** button. x
16.	You should also close the window used to run the query to Excel. Click the **Close** button. X
17.	You can also run the query to HTML and then download the results to an Excel spreadsheet or CSV text file. Click the **HTML** link. HTML
18.	Click in the **SetID** field.
19.	For tables shared across agencies, the SetID will be "SOKID". For tables unique to your agency, the SetID will be the same as the Business Unit. Enter the desired information into the **SetID** field. For this simulation, enter a valid value e.g. "**SOKID**".

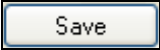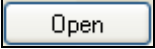| Step	Action
20.	Click the **View Results** button. View Results
21.	You have the choice of downloading query results in an Excel spreadsheet or a CSV text file. **Note:** Excel 2000 or later is preferred when downloading to Excel. For Excel 97, select the CSV Text File link for downloading large result sets.
22.	Click the **Excel SpreadSheet** link. Excel SpreadSheet
23.	The **File Download** window appears and gives you the option of opening or saving your query results. Click the **Save** button. Save
24.	Choose a location on your computer or network drive to save your Excel file. You can also choose to use the default file name or create your own. For this simulation, save the file to the **Desktop** and change the file name to "OMC3210_07152009". Double-click in the **File name** field. g
25.	Enter the desired information into the field. For this simulation, enter a valid value e.g. "**OMC3210_07152009**".
26.	Click the **Save** button. Save
27.	When the download is complete, you can open the Excel file, open the folder where you saved the file, or close the **Download Complete** window. Click the **Open** button. Open
28.	The Excel file opens in a new window where you can view, format, summarize, and transfer your **Search Results**. When you are finished, close the file. Click the **Close** button. x
29.	Now, save the results to your desktop as a CSV text file. Click the **CSV Text File** link. CSV Text File

Step	Action
30.	The **File Download** window provides you the option of opening the file or saving it to your computer. For this simulation, choose the **Save** option. Click the **Save** button. Save
31.	Choose a location on your computer or network drive to save your CSV text file. You can also choose to use the default file name or create your own. For this simulation, save the file to the **Desktop** and use the default file name. Click the **Save** button. Save
32.	When the download is complete, you can open the CSV text file, open the folder where you saved the file, or close the **Download Complete** window. Click the **Open** button. Open
33.	The CSV text file opens in a new window where you can view, format, summarize, and transfer your **Search Results**. When you are finished, close the file. Click the **Close** button. ❌
34.	**Congratulations!** You have successfully completed the **Downloading Query Results** topic. **End of Procedure.**