

Obtaining data using Actuate Query

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How do I obtain enterprise data using Actuate Query?

Actuate Query is a software designed to help you download reports directly, without contacting IT. By specifying your parameters, you can quickly and easily obtain data using this web-based software.

To obtain a data set:

1. In your **Documents** folder, select the type of data you want to download. A window will open to help you narrow your query.
2. Select the fields you're interested in:
 - Click **>** to select individual fields
 - Click **>>** to select all available fields
 - Click **<** to remove individual fields
 - Click **<<** to remove all available fields

The screenshot shows the Actuate Query web interface. At the top is a blue header with the 'ACTUATE' logo and a 'Help' link. Below the header are four tabs: '1. Content' (selected), '2. Sorting', '3. Filters', and '4. Finish'. The main area is titled 'Choose the fields to include to your query.' It contains two lists: 'Available Columns' on the left and 'Selected Columns' on the right. The 'Available Columns' list includes: Amount, Customer (highlighted), State, Category, Description, Item, Price, Quantity, and Order. Between the lists are four buttons: '>>', '>', '<', and '<<'. A vertical double-headed arrow is on the right side of the 'Selected Columns' list. At the bottom left is a checkbox labeled 'Allow user to change column selection when running the query'. At the bottom are five buttons: 'Preview', 'Cancel', 'Back', 'Next', and 'Finish'.

3. When you're satisfied with the selected fields, click **Next**. You'll be taken to tab 2. *Sorting*.

4. In the drop-down menu, select which field you want to sort your data by. You can add more than one field, and select whether it appears in Ascending or Descending order using the dropdown menu.

The screenshot shows the ACTUATE software interface. At the top, there is a blue header bar with the ACTUATE logo on the left and a 'Help' link on the right. Below the header, there are four tabs: '1. Content', '2. Sorting', '3. Filters', and '4. Finish'. The '2. Sorting' tab is currently selected. The main area of the '2. Sorting' tab is titled 'Specify the sort order.' and contains a dropdown menu with a list of fields: Amount, Customer, State, Category, Description, Item, Price, Quantity, and Order. The 'Customer' field is highlighted. To the right of the dropdown menu is a small dropdown menu with 'Ascending' selected. Below these elements is a checkbox labeled 'Allow user to change sort order when running the query', which is currently unchecked. At the bottom of the interface, there are five buttons: 'Preview', 'Cancel', 'Back', 'Next', and 'Finish'.

5. Click **Next** to continue. You'll be taken to tab 3. *Filters*.

6. Narrow your results using predefined and custom filters. Select filter parameters from the dropdown menus.

The screenshot shows the '3. Filters' tab in the ACTUATE application. The header bar is blue with the ACTUATE logo and a 'Help' link. Below the header, there are four tabs: '1. Content', '2. Sorting', '3. Filters' (selected), and '4. Finish'. The main area is titled 'Enter values for the predefined filters and custom filters.' and includes a checkbox 'Allow user to change'. Under 'Predefined Filters (Parameters)', there is a 'Location' dropdown menu with 'NH' selected. Below this, under 'Custom Filters', there is a dropdown menu with 'NH' and 'NY' options, and a text input field with an equals sign and a dropdown menu. At the bottom, there are buttons for 'Preview', 'Cancel', 'Back', 'Next', and 'Finish'.

7. Click **Next** to continue. You'll be taken to tab 4. *Finish*.
8. Select your desired output format and click **Run**. The output file will open in a new window.

The screenshot shows the '4. Finish' tab in the ACTUATE application. The header bar is blue with the ACTUATE logo. Below the header, there are four tabs: '1. Content', '2. Sorting', '3. Filters', and '4. Finish' (selected). The main area is titled 'Finish your query, choose output format and save the query (optional)'. It includes a 'Page header:' text input field. Under 'Output format:', there are four radio button options: 'Browser (DHTML)', 'Excel', 'PDF', and 'e.Analysis'. A 'Run' button is located to the right of these options. At the bottom, there is a checkbox labeled 'Allow user to change output format when running the query'.

At any point, even after running the query, you can modify the parameters by clicking **Back**.