



# **PeopleSoft Training**

## **BRF\_Financials\_Query\_9\_1**

**Version Date: January 2014**

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## BRF\_Financials\_Query\_9\_1

### Introduction to Query

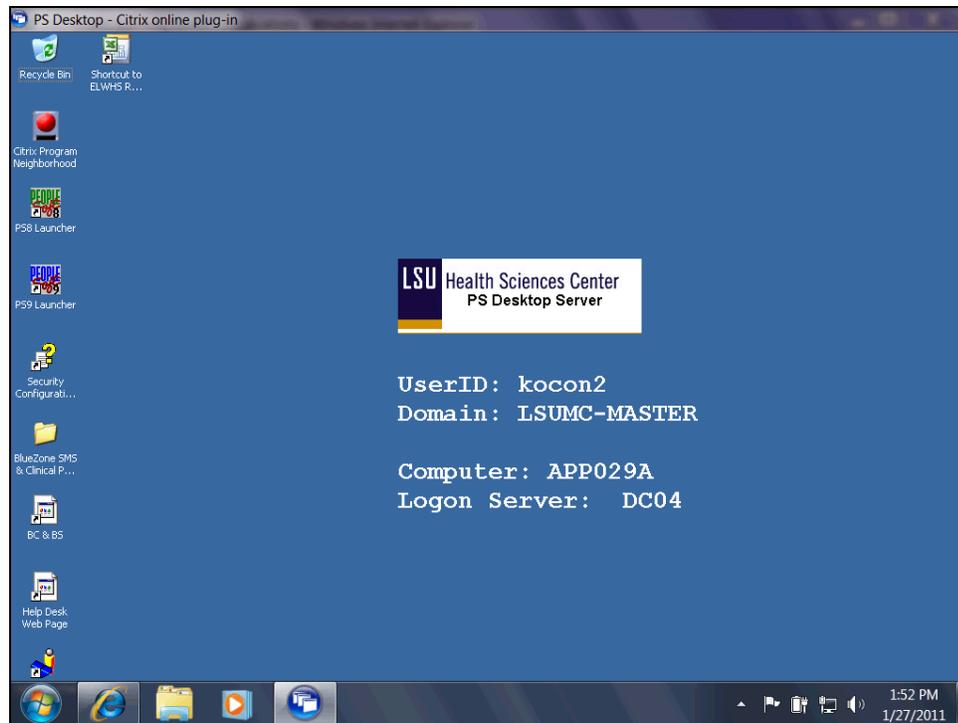
PeopleSoft Query is an end user reporting tool used to retrieve selected data from the database. PeopleSoft 9.1 provides query access in the web-based application through the Reporting Tools menu.

**NOTE:** *In Production, query will be accessed using the Reports (PS9FSRPT) database. In this manual, the Training (PS9FSTRN) database is used for training purposes only.*

### Navigate to Query Viewer

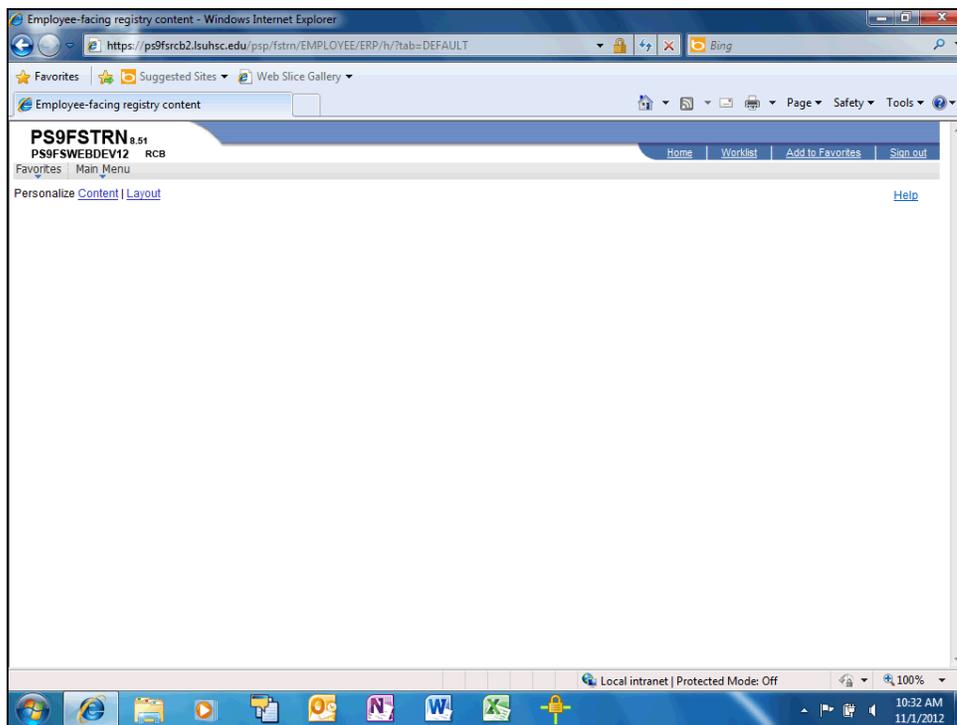
#### Procedure

In this topic you will learn how to [Navigate to Query Viewer](#).

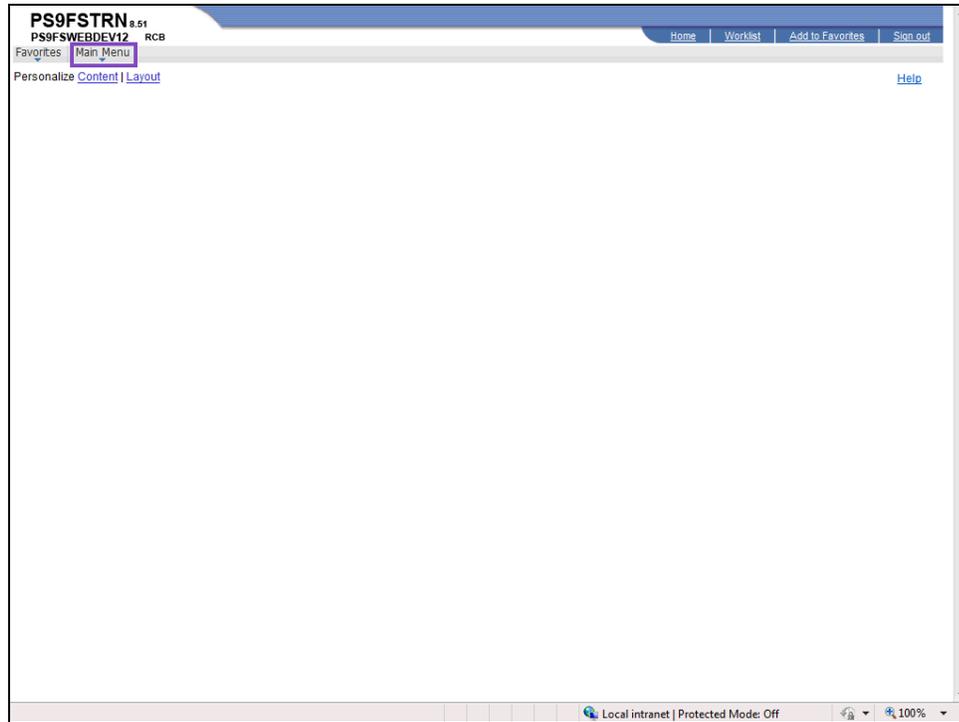


Step	Action
1.	Double-click the <b>PS9 Launcher</b> button. 

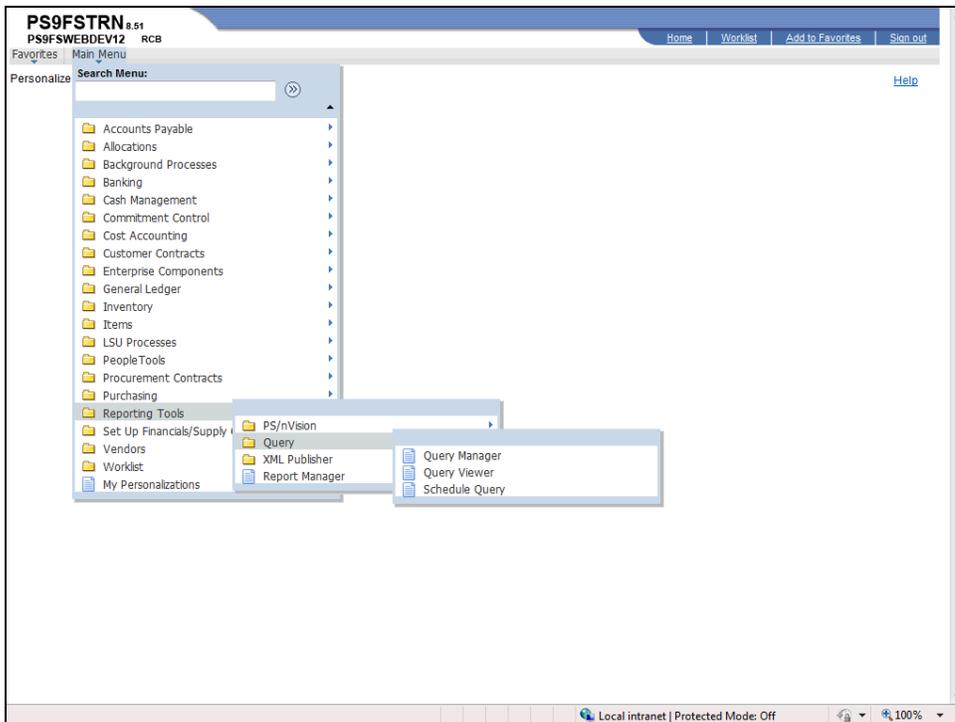
Step	Action
2.	Click the button to the right of the <b>Database</b> field. 
3.	Click the <b>PS 9 Financials Reports (PS9FSRPT)</b> option. 
4.	Click the <b>Start</b> button. 
5.	Anytime you enter a non-production database (RPT, SND, TRN, etc), a warning message displays reminding you any information entered into the database will be lost.  Click the <b>Yes</b> button. 



Step	Action
6.	Press <b>[F11]</b> key on your computer keyboard to hide the browser menu and address bars.



Step	Action
7.	Click the <b>Main Menu</b> button. 
8.	Click the <b>Reporting Tools</b> menu. 
9.	Click the <b>Query</b> menu. 



Step	Action
10.	Click the <b>Query Viewer</b> link. 
11.	The Query Viewer search page displays. From the Query Viewer search page you can: <ul style="list-style-type: none"> <li>• Search and run existing public or private queries, and/or</li> <li>• Add a query to Query Favorites.</li> </ul>
12.	This completes <i>Navigate to Query Viewer</i> . <b>End of Procedure.</b>

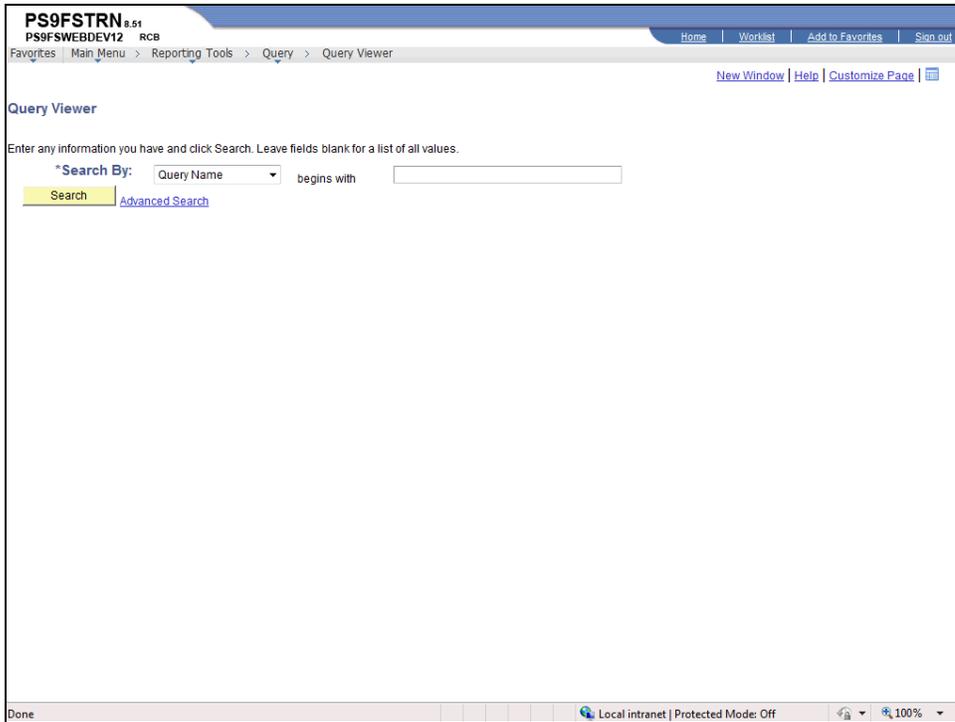
## Exercise 1

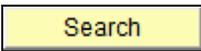
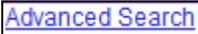
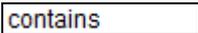
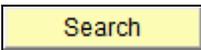
### Run a Predefined Query from Query Viewer

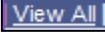
#### Procedure

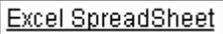
In this topic you will learn how to **Run a Predefined Query from Query Viewer**.

Step	Action
1.	<p><b>Scenario</b></p> <p>In this example you will run the APY3001 _AP_VENDOR_SUMMAY query to retrieve a list of approved vendors.</p>
2.	<p>You can access existing, predefined queries (Public and/or Private) from the Query Viewer page. Public queries are available to <b>all</b> end users with query access. Private queries are queries associated only with your UserID. Private queries can be created or can be amended Public queries. Creating and amending queries are discussed later in this manual.</p>
3.	<p>You must enter all or part of the query name into the Search By field. The Search By field is <b>not</b> case sensitive. You may enter information in upper, lower or mixed case.</p>
4.	<p>The "wildcard" can be utilized to focus your search. The wildcard is a percent (%) sign. The wildcard may be placed before, in the middle, at the end, or bracket the query name. For example:</p> <ol style="list-style-type: none"> <li>1. If the wildcard is placed at the end of the query name, APY%, the system will retrieve query names that end in APY.</li> <li>2. If the wildcard is placed in the middle of the query name, %APY%AP, the system will retrieve query names that contain APY somewhere in the name and ends with AP.</li> <li>3. If the wildcard brackets the query name %APY%AP%, the system will retrieve query names that contain APY and AP somewhere in the query name.</li> </ol>



Step	Action
5.	Enter the desired information into the field. Enter " <b>APY%</b> ".
6.	Click the <b>Search</b> button. 
7.	The system retrieves a list of query names that begins with APY. A total of 102 results were retrieved, with the first 30 displaying at the bottom of the page.
8.	Click the <b>Query Viewer</b> link. 
9.	The "begins with" operand cannot be changed on the Query View page, but can be changed using the Advanced Search link. The Advanced Search link offers an alternative method of retrieving information.  Click the <b>Advanced Search</b> link. 
10.	Click the button to the right of the <b>Query Name</b> field. 
11.	Click the <b>contains</b> list item. 
12.	Enter the desired information into the <b>Query Name</b> field. Enter " <b>APY</b> ".
13.	Click the <b>Search</b> button. 

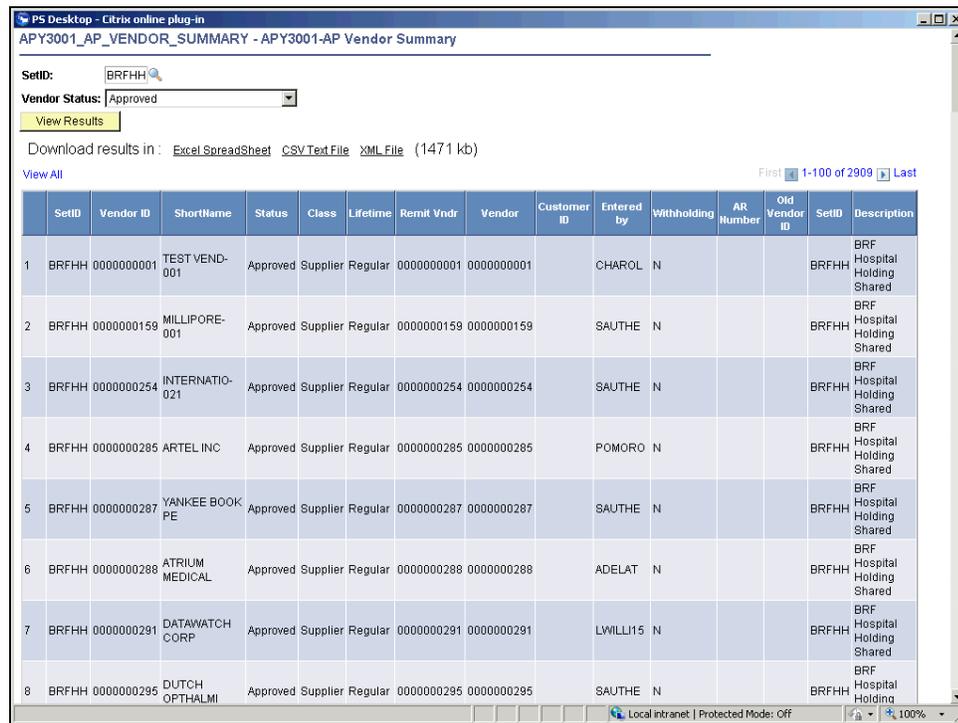
Step	Action
14.	A total of 107 options were returned using the Advanced Search method. Click the <b>View All</b> link. 
15.	Scroll down through the list of queries to find the <b>APY3001_AP_VENDOR_SUMMARY</b> query.  Click the <b>Down</b> button of the scrollbar. 
16.	Queries can be displayed in two formats: HTML and Excel. Both options will be demonstrated in this example, beginning with the HTML option.  <i><b>NOTE: Results downloaded to HTML can only be viewed as displayed. If you want to be able to manipulate the results, download your results directly to Excel.</b></i>
17.	Click the <b>HTML</b> link.  <i><b>NOTE: It is recommended that you run your query first to HTML to determine the number of options returned. Running your query to HTML will return <u>all</u> available results. Excel contains a finite number of rows and cannot always display large numbers of results.</b></i> 
18.	All University Health (BRF) facilities use the same SetID for vendor data, which is <b>BRFHH</b> . The SetID is case sensitive and BRFHH <b>must</b> be entered in ALL CAPS. Use the tab key, touch pad or mouse to move between fields. Do <b>not</b> use the Enter key as it acts as a Save option.  Enter the desired information into the <b>SetID</b> field. Enter " <b>BRFHH</b> ".
19.	Click the button to the right of the <b>Vendor Status</b> field. 
20.	Click the <b>Approved</b> option. 
21.	Click the <b>View Results</b> button.  <i><b>NOTE: A list of approved vendors will be retrieved and displayed below the View Results button.</b></i> 
22.	The total number of approved vendors retrieved display above the Description column. In this example, 2,909 vendors were retrieved. The first 100 vendors display in ascending order by Vendor ID number.
23.	The right arrow allows you to view the next 100 vendors. The Last link allows you to view the last 100 vendors. The left arrow allows you to navigate to the previous page, and the First link displays the first 100 vendors.

Step	Action
24.	The View All link displays all 2,909 vendors at one time.  <i>NOTE: It may take a few minutes to process your request when your search has retrieved a large number of results. The Processing indicator will display in the top right corner of the page.</i>
25.	HTML results can be downloaded to an Excel spreadsheet. Downloading results into an Excel spreadsheet will allow you to manipulate the data, move columns, hide columns, etc.  Click the <b>Excel Spreadsheet</b> link. This will open a new window. 



Step	Action
26.	You may change column widths, sort data, add formulas or utilize any other features available in Excel. You may save the query results to a network drive for later use, or you may print the results.  Click the <b>Close</b> button. 

Step	Action
27.	<p>CSV is an abbreviation for Comma Separated Value file. This type of file is not generally used by end users, but is available.</p> <p>The XML option is not available for use at this time.</p>



Step	Action
28.	<p>Click the <b>Close</b> button.</p> 
29.	<p>This completes <i>Run a Predefined Query from Query Viewer</i>.</p> <p><b>End of Procedure.</b></p>

## Exercise 2

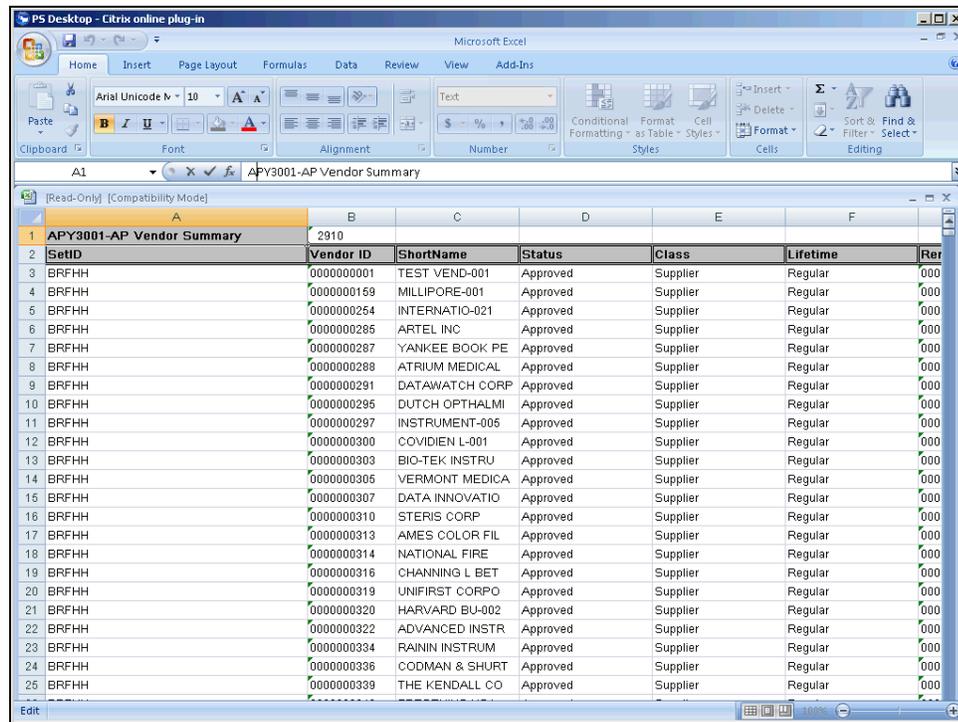
### Run a Predefined Excel Query from Query Viewer

#### Procedure

In this topic you will learn how to **Run a Predefined Query from Query Viewer**.

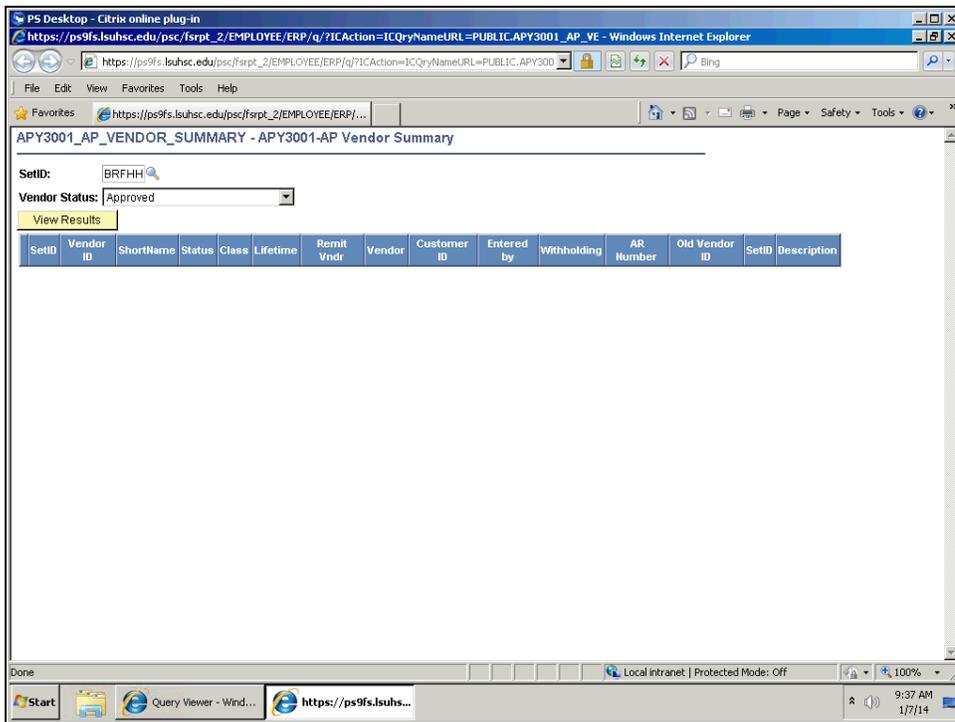
PS9FSTRN 8.61 PS9F5WEBDEV12 RCB						
Favourites   Main Menu > Reporting Tools > Query > Query Viewer						
APY2053_DRAFT_CREATE_DETAIL	APY2053 - Draft Create Detail	Public	HTML	Excel	XML	Schedule Favorite
APY2054_DFT_STAMP_TAX_SUMMARY	APY2054 - Dft Stamp Tax Summary	Public	HTML	Excel	XML	Schedule Favorite
APY2055_POSITIVE_PAYMENT	APY2055-Positive Payment	Public	HTML	Excel	XML	Schedule Favorite
APY2056_DFT_CREATE_SUMMARY	APY2056 - Dft Create Summary	Public	HTML	Excel	XML	Schedule Favorite
APY2060_AGENCY_LOC_CD	Agency Location Codes Listing	Public	HTML	Excel	XML	Schedule Favorite
APY2100_OPEN_PREPAYMENTS	APY2100- Open Prepayments	Public	HTML	Excel	XML	Schedule Favorite
APY2101_PREPAYMENT_SETTLEMENTS	APY2101- Prepayment Settlement	Public	HTML	Excel	XML	Schedule Favorite
APY3000_ADDRESS_SUBQUERY	APY3000-Address Subquery	Public	HTML	Excel	XML	Schedule Favorite
APY3000_VENDOR_DETAIL	APY3000-Vendor Detail	Public	HTML	Excel	XML	Schedule Favorite
APY3001_AP_VENDOR_SUMMARY	APY3001-AP Vendor Summary	Public	HTML	Excel	XML	Schedule Favorite
APY3012_VENDOR_WTHD_BALANCE	APY3012-VENDOR WTHD BALANCE	Public	HTML	Excel	XML	Schedule Favorite
APY3020_VNDR_OUTSTANDING_BAL	APY3020-Vndr Outstanding Bal	Public	HTML	Excel	XML	Schedule Favorite
APY3200	APY3200	Public	HTML	Excel	XML	Schedule Favorite
APY3200A	APY3200A	Public	HTML	Excel	XML	Schedule Favorite
APY3210	APY3210	Public	HTML	Excel	XML	Schedule Favorite
APY3210A	APY3210A	Public	HTML	Excel	XML	Schedule Favorite
APY6000_PAYMENT_ARCHIVE_REPORT	APY6000-Payment Archive Report	Public	HTML	Excel	XML	Schedule Favorite
APY6001_VOUCHER_ARCHIVE_REPORT	APY6001-Voucher Archive Report	Public	HTML	Excel	XML	Schedule Favorite
APY6002_VENDOR_ARCHIVE_REPORT	APY6002-Vendor Archive Report	Public	HTML	Excel	XML	Schedule Favorite
APY7010_WITHHOLDING_RULES	APY7010-WITHHOLDING RULES	Public	HTML	Excel	XML	Schedule Favorite
APY7020_WITHHOLDING_TYPES	APY7020-WITHHOLDING TYPES	Public	HTML	Excel	XML	Schedule Favorite
APY7030_WITHHOLDING_ENTITIES	APY7030-WITHHOLDING ENTITIES	Public	HTML	Excel	XML	Schedule Favorite
APY7040_WITHHOLDING_CODES	APY7040-WITHHOLDING CODES	Public	HTML	Excel	XML	Schedule Favorite
APY7050	Withholding Calc Report Query	Public	HTML	Excel	XML	Schedule Favorite
APY8025	WithHolding for Japan	Public	HTML	Excel	XML	Schedule Favorite
APY8030	190 Model	Public	HTML	Excel	XML	Schedule Favorite
APY8032_CIS6_PAYMENTS	UK Withholding - CIS6 Payments	Public	HTML	Excel	XML	Schedule Favorite
APY8035	Withholding France DAS2	Public	HTML	Excel	XML	Schedule Favorite
APY8045_PPS_1	WTHD PPS Remittance Advice	Public	HTML	Excel	XML	Schedule Favorite
APY8048_PPS_2	WTHD PPS Annual Report	Public	HTML	Excel	XML	Schedule Favorite
APY8049_PPS_3	WTHD PPS Payment Summary	Public	HTML	Excel	XML	Schedule Favorite
APY8050	WithHolding for Canada T4A	Public	HTML	Excel	XML	Schedule Favorite

Step	Action
1.	<p>Queries can also be run directly to Excel from the Query Viewer Search page.</p> <p>Click the <b>Excel</b> link for query APY3001_AP_VENDOR_SUMMARY.</p> 
2.	<p>The SetID is always <b>BRFH</b> and <b>must</b> be entered in ALL CAPS.</p> <p>Enter the desired information into the <b>SetID</b> field. Enter "<b>BRFH</b>".</p>
3.	<p>Click the button to the right of the <b>Vendor Status</b> field.</p> 
4.	<p>Click the <b>Approved</b> list item.</p> 
5.	<p>Click the <b>View Results</b> button.</p> 



SetID	Vendor ID	ShortName	Status	Class	Lifetime	Rer
3	000000001	TEST VEND-001	Approved	Supplier	Regular	000
4	000000159	MILLIPORE-001	Approved	Supplier	Regular	000
5	000000254	INTERNATIO-021	Approved	Supplier	Regular	000
6	000000285	ARTEL INC	Approved	Supplier	Regular	000
7	000000287	YANKEE BOOK PE	Approved	Supplier	Regular	000
8	000000288	ATRIUM MEDICAL	Approved	Supplier	Regular	000
9	000000291	DATAWATCH CORP	Approved	Supplier	Regular	000
10	000000295	DUTCH OPHTHALMI	Approved	Supplier	Regular	000
11	000000297	INSTRUMENT-005	Approved	Supplier	Regular	000
12	000000300	COVIDIEN L-001	Approved	Supplier	Regular	000
13	000000303	BIO-TEK INSTRU	Approved	Supplier	Regular	000
14	000000305	VERMONT MEDICA	Approved	Supplier	Regular	000
15	000000307	DATA INNOVATIO	Approved	Supplier	Regular	000
16	000000310	STERIS CORP	Approved	Supplier	Regular	000
17	000000313	AMES COLOR FIL	Approved	Supplier	Regular	000
18	000000314	NATIONAL FIRE	Approved	Supplier	Regular	000
19	000000316	CHANNING L BET	Approved	Supplier	Regular	000
20	000000319	UNIFIRST CORPO	Approved	Supplier	Regular	000
21	000000320	HARVARD BU-002	Approved	Supplier	Regular	000
22	000000322	ADVANCED INSTR	Approved	Supplier	Regular	000
23	000000334	RAININ INSTRUM	Approved	Supplier	Regular	000
24	000000336	CODMAN & SHURT	Approved	Supplier	Regular	000
25	000000339	THE KENDALL CO	Approved	Supplier	Regular	000

Step	Action
6.	<p>Running the query directly to Excel allows you to manipulate the results. You may perform any function or features available in Excel. You are also able to Save your results to a folder.</p> <p>Click the <b>Close</b> button.</p> 



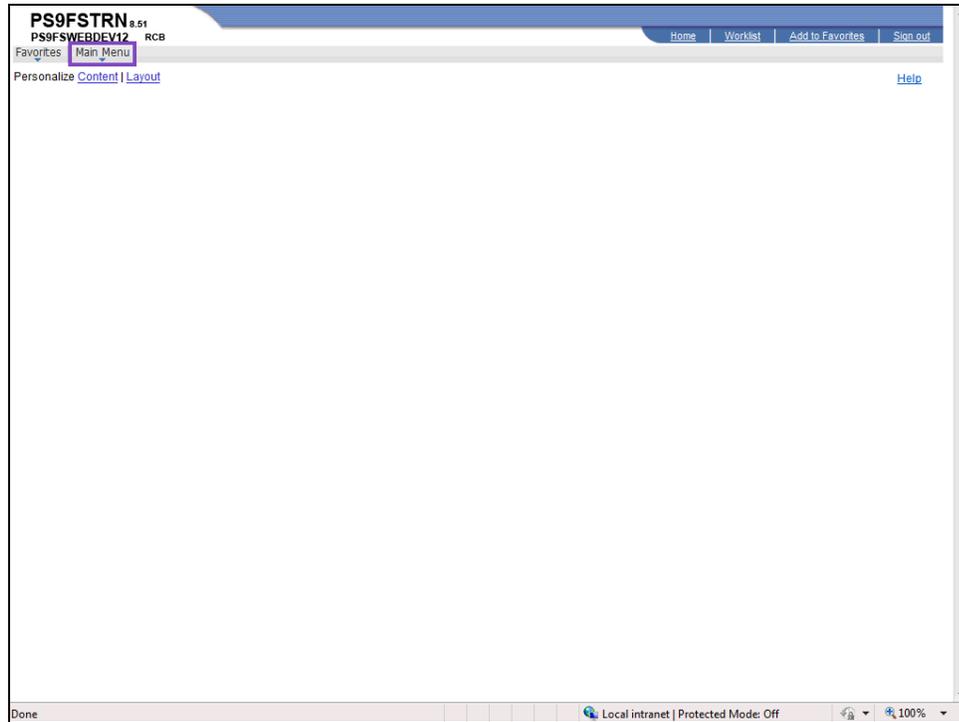
Step	Action
7.	Click the <b>Close</b> button. 
8.	This completes <i>View a Predefined Excel Query from Query Viewer</i> . <b>End of Procedure.</b>

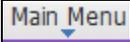
### Exercise 3

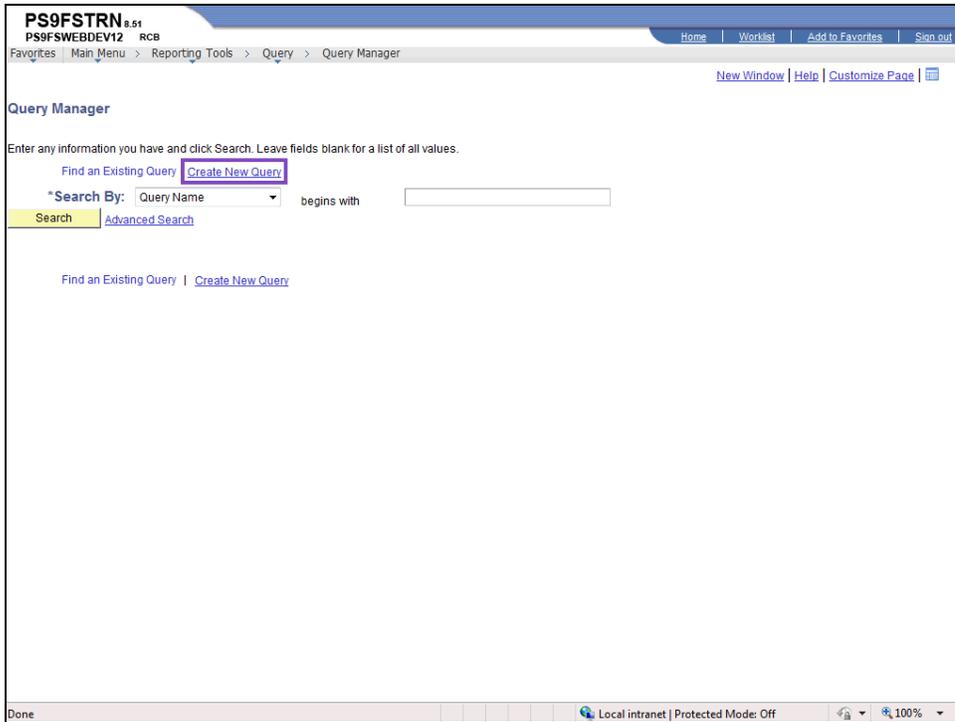
#### Create and Format a Query

##### Procedure

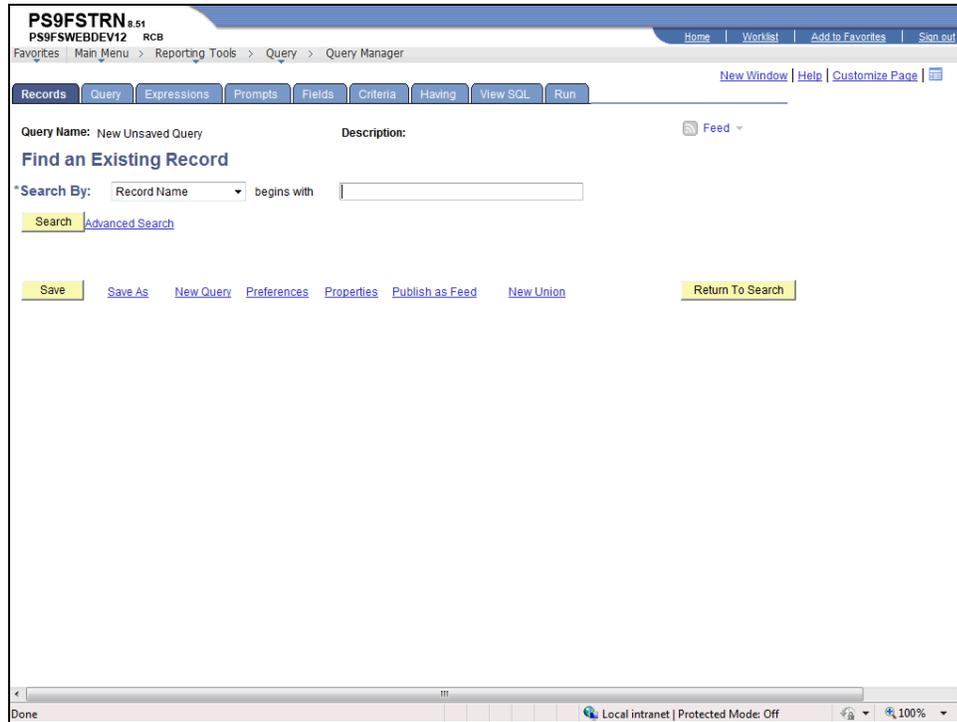
In this topic you will learn how to **Create and Format a Query**.



Step	Action
1.	Click the <b>Main Menu</b> button. 
2.	Click the <b>Reporting Tools</b> menu. 
3.	Click the <b>Query</b> menu. 
4.	Click the <b>Query Manager</b> menu. 



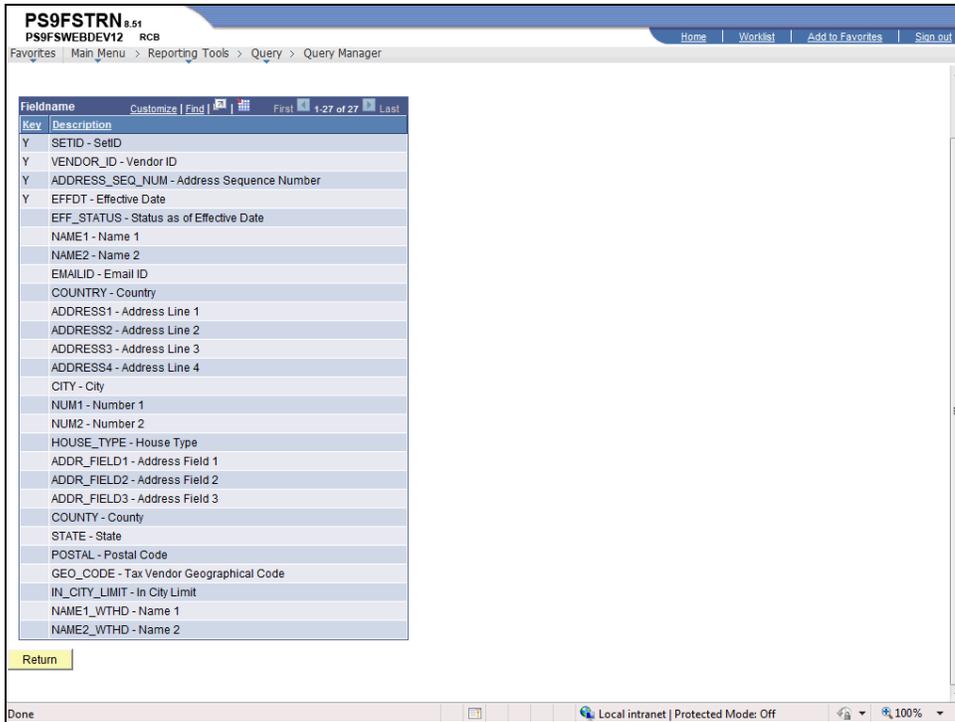
Step	Action
5.	Click the <b>Create New Query</b> link. 
6.	The Find an Existing Record page.  Across the top of the page are nine tabs that can be used in creating or amending a query. The system defaults you into the Records tab.
7.	PeopleSoft stores the data entered into the system in tables. The tables are comprised of rows (records) and columns (fields). You will select the various rows (records) and columns (fields) you want the system to retrieve to create your query. When your query is run, the data associated with the selected records and fields will display in your report.  In this example you will create a query that generates a list of vendor names, addresses and current status (e.g. Active or Inactive)



Step	Action
8.	<p>You start by selecting a record. Since you are interested in generating a list of vendors, it makes sense to first determine what vendor records are available.</p> <p>You must enter all or part of the Record Name into the Search By field. The wildcard (%) or the Advanced Search link may be utilized to help focus your search.</p> <p>Enter the desired information into the <b>Search By</b> field. Enter "<b>VEN</b>".</p>
9.	<p>Click the <b>Search</b> button.</p> <p><b>Search</b></p>
10.	<p>A list of 20 record options display.</p> <p>If you are unsure of which record to use, you can click a record's Show Fields link to view the fields that comprise the record. In this example, you will click the Show fields link for the <b>VENDOR_ADDR</b> record.</p> <p>Click the <b>Show Fields</b> link.</p> <p><b>Show Fields</b></p>
11.	<p>A list of fields displays for your review.</p> <p>If the fields you are interested in are not listed, simply return to your Search Results and click on the Show Fields link for another record.</p>

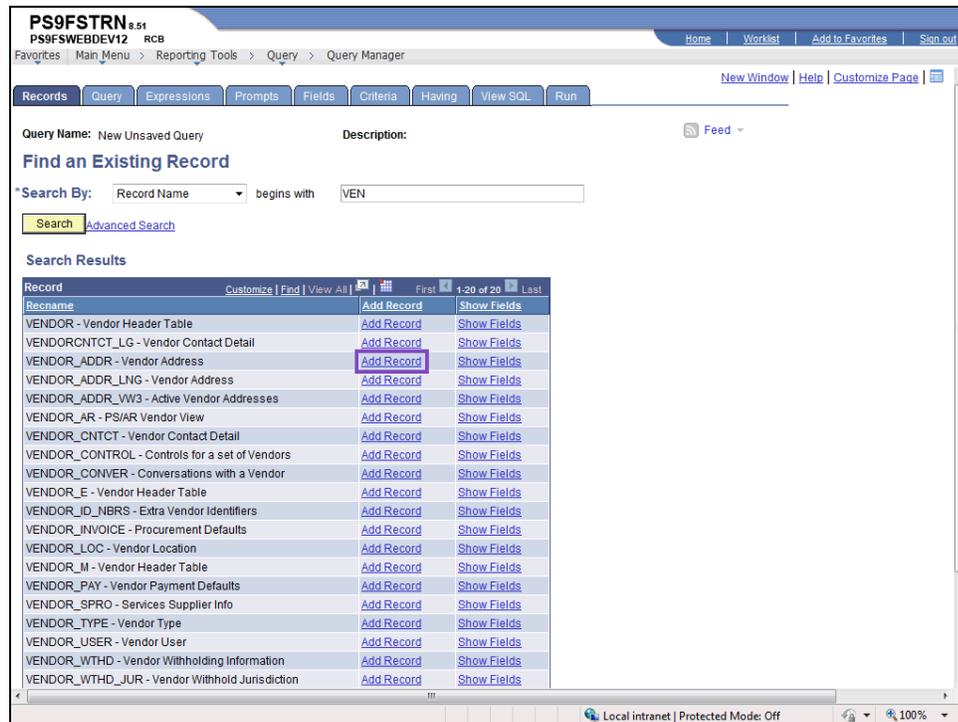
# Training Guide

## BRF\_Financials\_Query\_9\_1

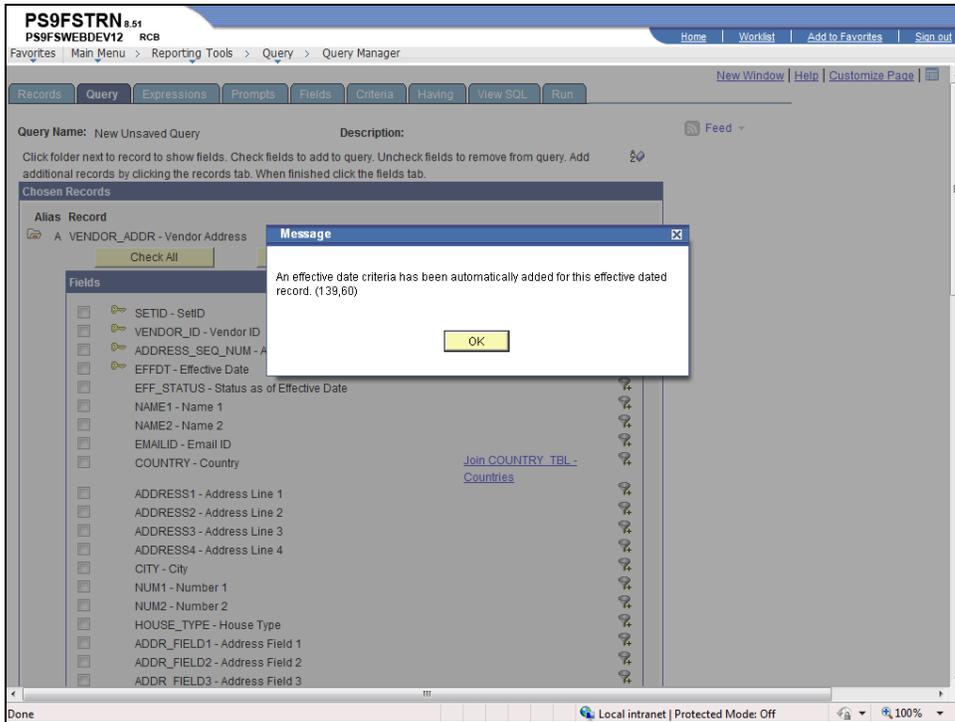


Step	Action
12.	Click the <b>Return</b> button.

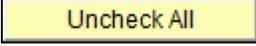
Return

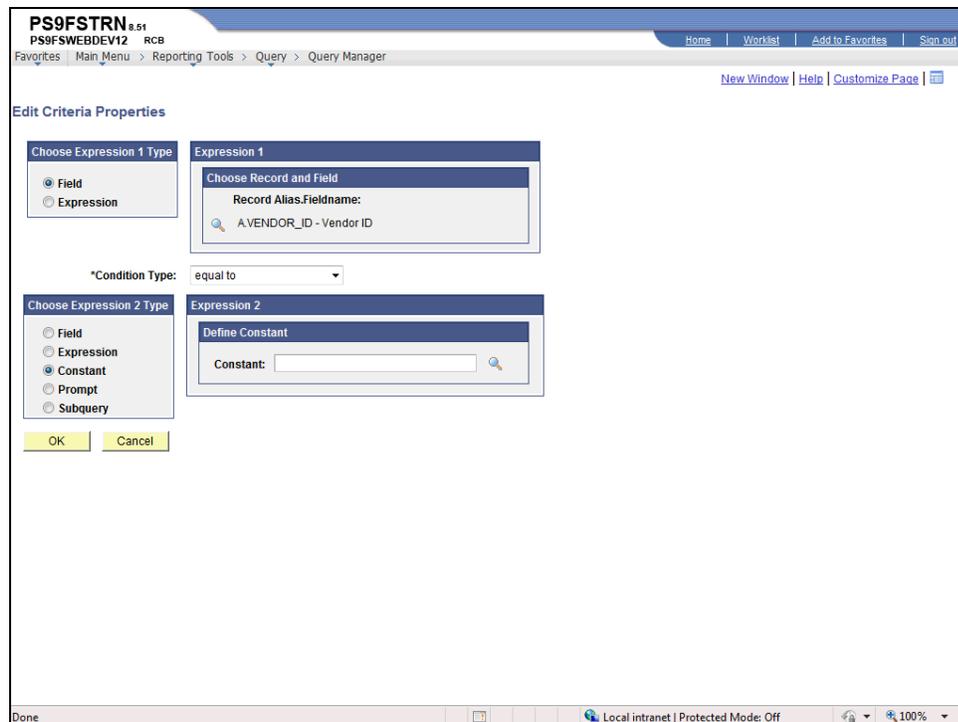


Step	Action
13.	<p>For this example, the VENDOR_ADDR - Vendor address record is the record you will use.</p> <p>Click the <b>Add Record</b> link for the VENDOR_ADDR record.</p> <p><i>NOTE: Once you select the Add Record option, the system will automatically take you to the Query tab where you will view the available field options for the Vendor_ADDR record.</i></p> <p><a href="#">Add Record</a></p>

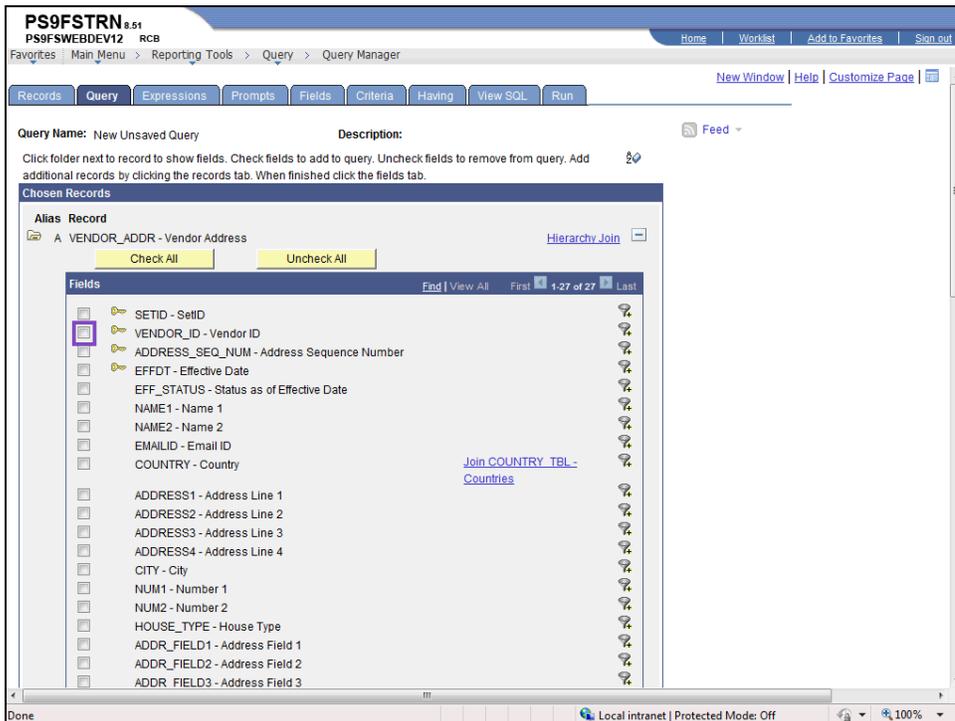


Step	Action
14.	<p>An Effective Date message will display when a record is selected. This allows you to modify the criteria and retrieve rows of data within a specified time frame. All data will be retrieved with effective dates prior to the current date.</p> <p>Click the <b>OK</b> button.</p> 
15.	<p>The system takes you to the Query tab.</p> <p>From the Query tab you can select individual fields within a record. The fields you select will display as the columns on your report.</p>
16.	<p>Field names do not default in alphabetical order. The system provides a Sort fields alphabetically option to make searching for fields easier.</p> <p>Click the <b>Sort fields alphabetically</b> button.</p> 
17.	<p>The fields display in alphabetical order. By clicking the Sort fields alphabetically button again, the system returns the fields to the original order.</p> <p>Click the <b>Sort fields alphabetically</b> button.</p> 

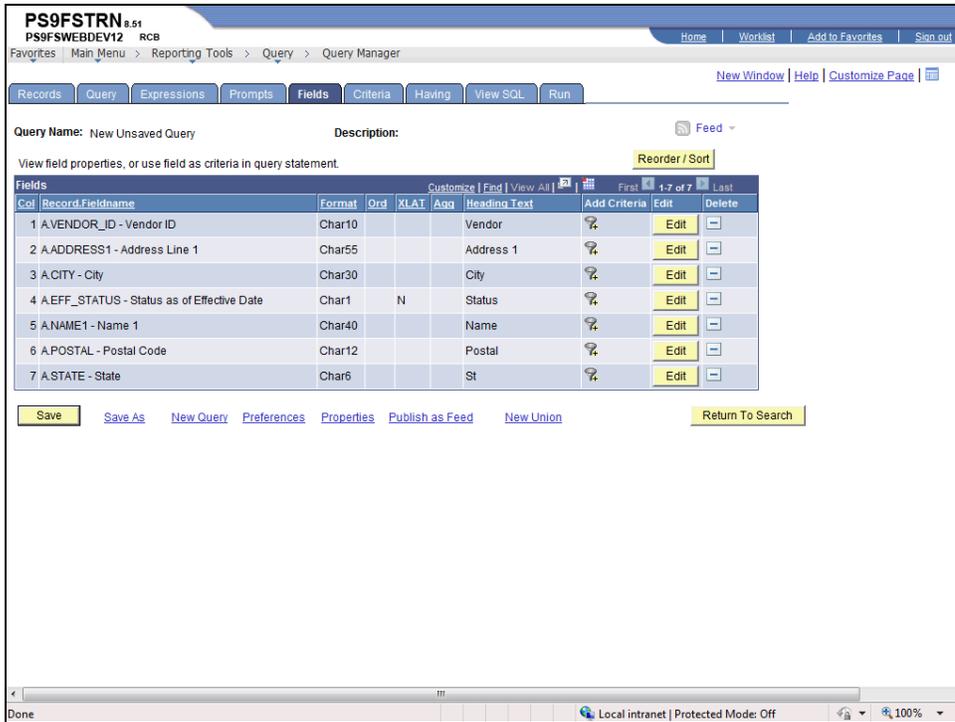
Step	Action
18.	<p>The Check All button is used if you want to use all the fields associated with the record in your query.</p> <p>Click the <b>Check All</b> button.</p> 
19.	<p>The Uncheck All button deselects all of the fields associated with the record.</p> <p>Click the <b>Uncheck All</b> button.</p> 
20.	<p>When a field is selected, the system returns <b>all</b> the data for the field. You can narrow your results by specifying criteria for the field. The Use as Criteria (funnel) option allows you to add criteria for a particular field.</p> <p>For example if you selected the Vendor ID field for your query, all vendors will be retrieved from the database. If you only wanted to retrieve vendors who have an Active status, you could specify this using criteria.</p> <p>Click the <b>Use as Criteria</b> button.</p> 



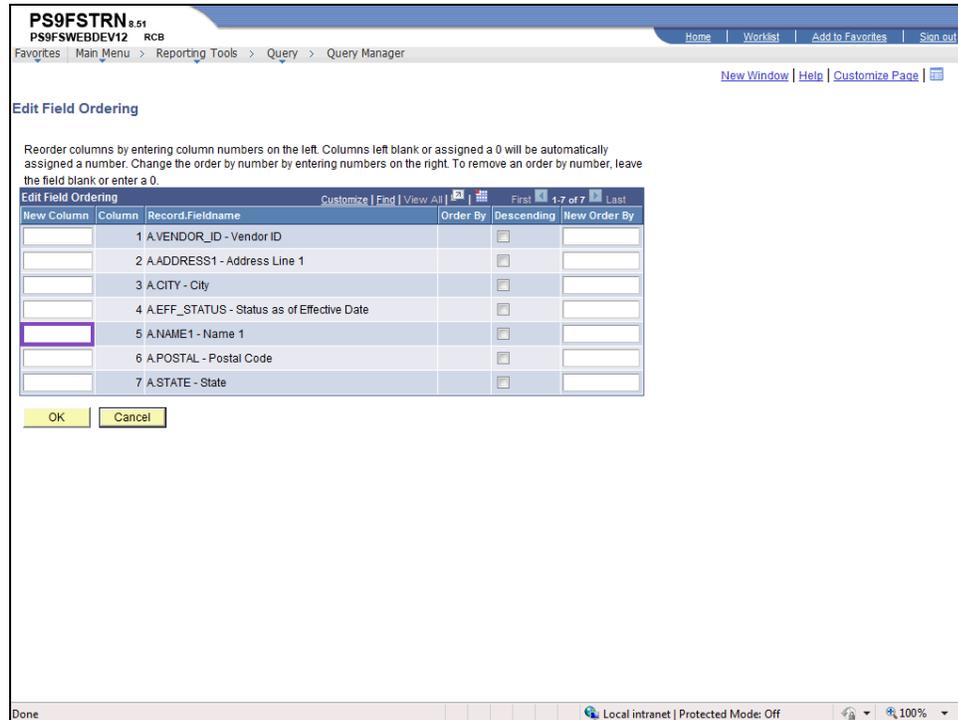
Step	Action
21.	<p>From the Edit Criteria Properties page, you can Choose Expression, Choose Record or Field, or Define Constant.</p> <p><i>NOTE: See Exercise 4 for information on the Using as Criteria feature.</i></p> <p>Click the <b>Cancel</b> button.</p> 
22.	<p>Joins are used when creating queries using more than one record. Joins allow you to retrieve data from multiple tables, but present it as if it came from one table. Three types of joins are used in PeopleSoft: Hierarchy Join, Standard (Any) Join and Related Record Join.</p> <p><i>NOTE: Joins are <u>not</u> used when creating a single record query.</i></p> <p><i>NOTE: See Exercise 5 - Hierarchy Joins for additional information.</i></p>
23.	<p>Key symbols identify fields found on multiple records. Key fields provide a link when joining multiple records.</p>
24.	<p><b>Selecting Fields</b></p> <p>Select a field by clicking the checkbox to the left of the Field Name.</p> <p>For this example the following fields will be selected: Vendor ID, Effective Status, Name1, Address1, City, State, and Postal.</p>

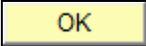


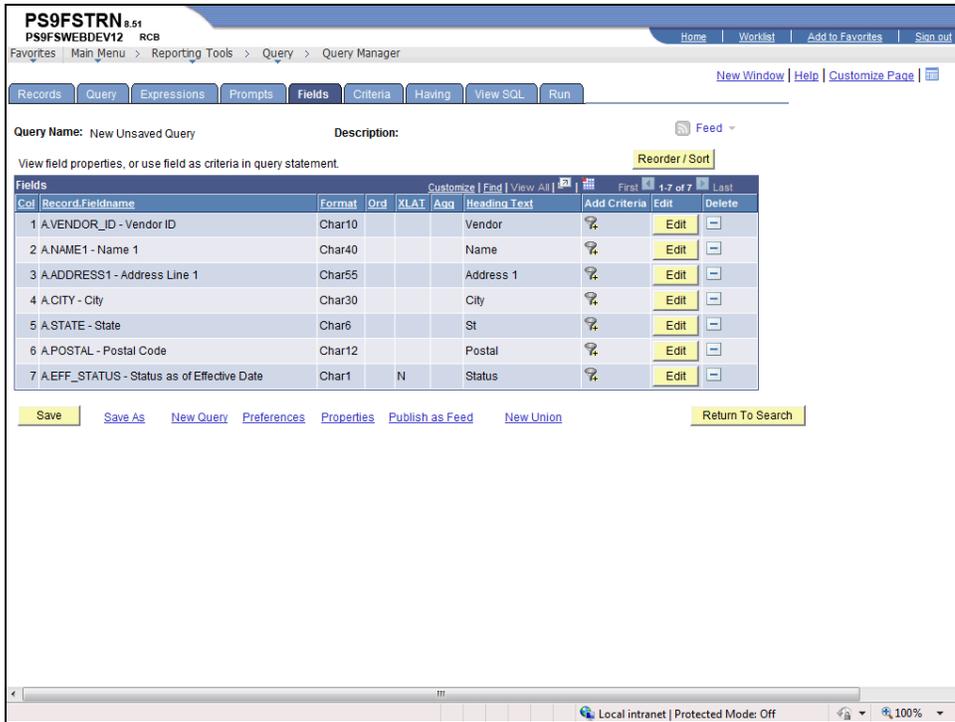
Step	Action
25.	Click the <b>VENDOR_ID</b> option. 
26.	Click the <b>Sort fields alphabetically</b> button to make field selection easier. 
27.	Click the <b>ADDRESS1</b> option. 
28.	Click the <b>CITY</b> option. 
29.	Click the <b>EFF_STATUS</b> option. 
30.	Click the <b>NAME1</b> option. 
31.	Click the <b>POSTAL</b> option. 
32.	Click the <b>STATE</b> option. 
33.	After all fields have been selected, click the Fields tab to view the selected fields collectively.  Click the <b>Fields</b> tab. 
34.	The fields display on the Fields tab in the order in which they were selected. Each field represents a column on your spreadsheet, so this also the order they will display in your report. Often fields will need to be reordered to make query results easier to read.
35.	<b>NOTE: It is recommended the query be saved when any changes are made. The Save As option will be used when first saving your query so that a name can be assigned.</b>  For <b>training purposes only</b> , you will forgo saving the query at this time.

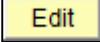


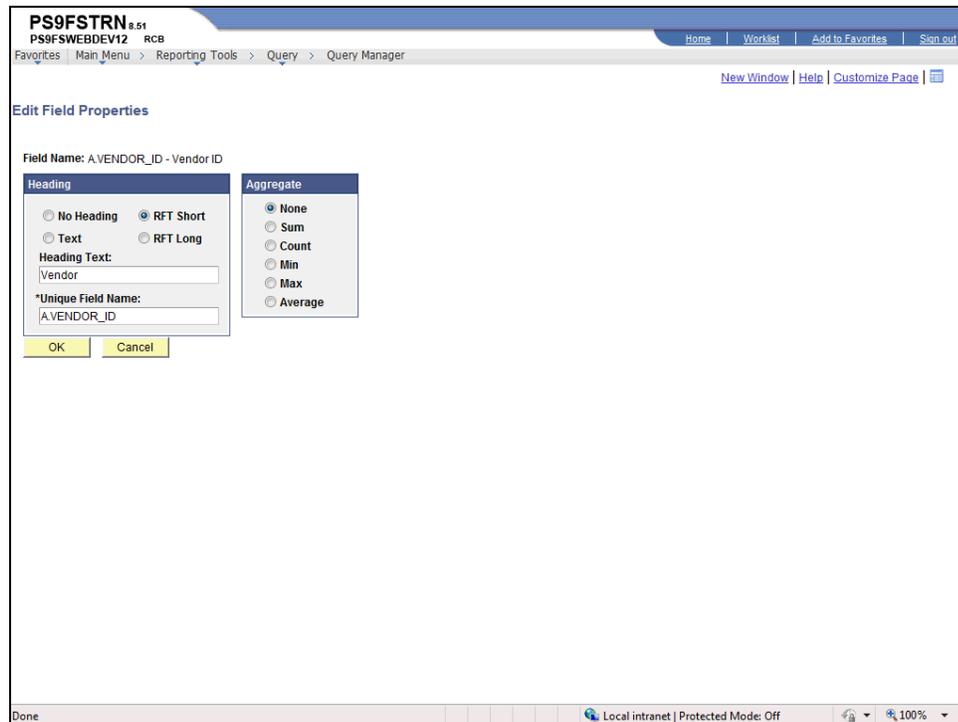
Step	Action
36.	<p>The Reorder/Sort button allows you change the order of the fields and, therefore, the order of your spreadsheet columns.</p> <p>Click the <b>Reorder / Sort</b> button.</p> <p><b>Reorder / Sort</b></p>
37.	<p>VENDOR_ID will remain as column 1, so no entry will need to be made for this field.</p>

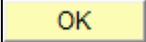


Step	Action
38.	<p>Reorder columns by entering the column number in the New Column field. If a field is left blank, that column will remain as originally indicated.</p> <p>In this example, NAME1 is the fourth (4th) column on your spreadsheet. Change NAME1 to column one (2).</p> <p>Enter the desired information into the <b>New Column - NAME1</b> field. Enter "2".</p>
39.	Enter the desired information into the <b>New Column - ADDRESS1</b> field. Enter "3".
40.	Enter the desired information into the <b>New Column - CITY</b> field. Enter "4".
41.	Enter the desired information into the <b>New Column - STATE</b> field. Enter "5".
42.	Enter the desired information into the <b>New Column - POSTAL</b> field. Enter "6".
43.	Enter the desired information into the <b>New Column - EFF_STATUS</b> field. Enter "7".
44.	<p>Click the <b>OK</b> button.</p> 
45.	The Fields are reordered based on the changes you made on the Reorder/Sort panel.
46.	The Heading Text displays the text used for each field (column) on your report. Field titles can be changed using the Edit feature.



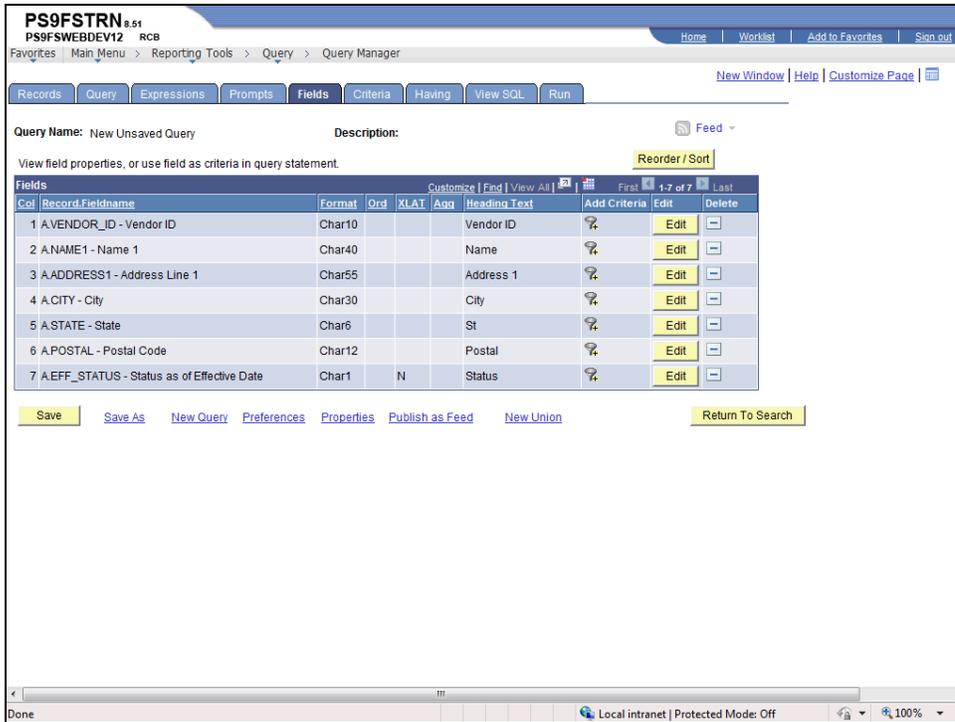
Step	Action
47.	<p>In this example you will change the VENDOR_ID Heading Text from Vendor to Vendor ID.</p> <p>Click the <b>VENDOR_ID Edit</b> button to change the Heading Text (column title).</p> 
48.	<p>The system defaults to RFT Short (Record Field Text Short). A RFT Short column title will be up to a 10-character long.</p> <p><b>NOTE: The Heading Text field displays the selected column title. In this example, the column title would display as Vendor since the RFT Short options is selected.</b></p> <p>The RFT Long displays up to a 30-character column title.</p> <p>The Text option displays the column title as it is entered in the Heading Text field.</p> <p>No Heading will result in the column title being blank.</p>



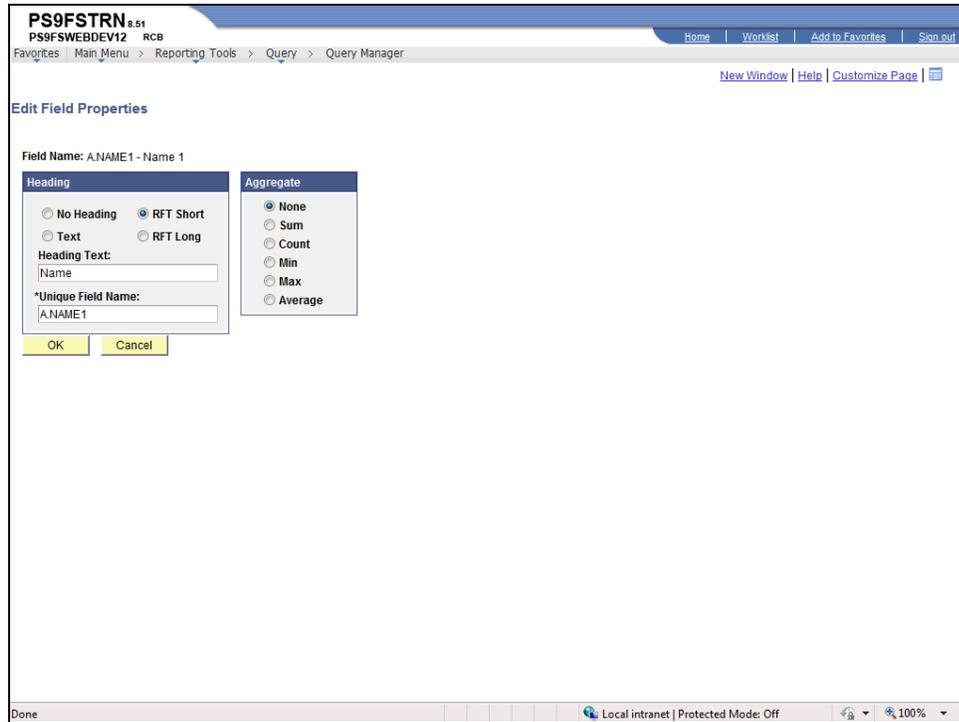
Step	Action
49.	Click the <b>RFT Long</b> option. 
50.	<i>NOTE: The Unique Name Field will always remain as defaulted.</i>  Click the <b>OK</b> button. 
51.	The Heading Text for the VENDOR_ID field has changed from Vendor to Vendor ID.

# Training Guide

## BRF\_Financials\_Query\_9\_1



Step	Action
52.	Click the <b>NAME1 Edit</b> button. <div style="border: 1px solid black; padding: 2px; display: inline-block; margin: 5px;">Edit</div>



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Favorites | Main Menu > Reporting Tools > Query > Query Manager

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### Edit Field Properties

Field Name: ANAME1 - Name 1

**Heading**

No Heading    RFT Short

Text    RFT Long

Heading Text:

Name

\*Unique Field Name:

ANAME1

**Aggregate**

None

Sum

Count

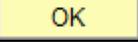
Min

Max

Average

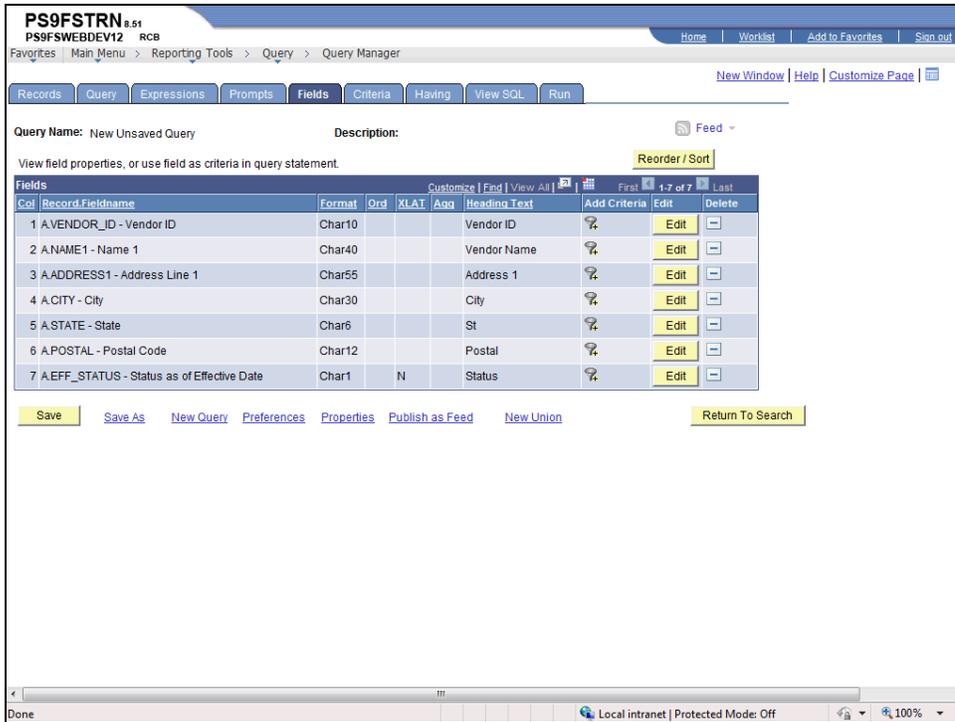
OK   Cancel

Done   Local intranet | Protected Mode: Off   100%

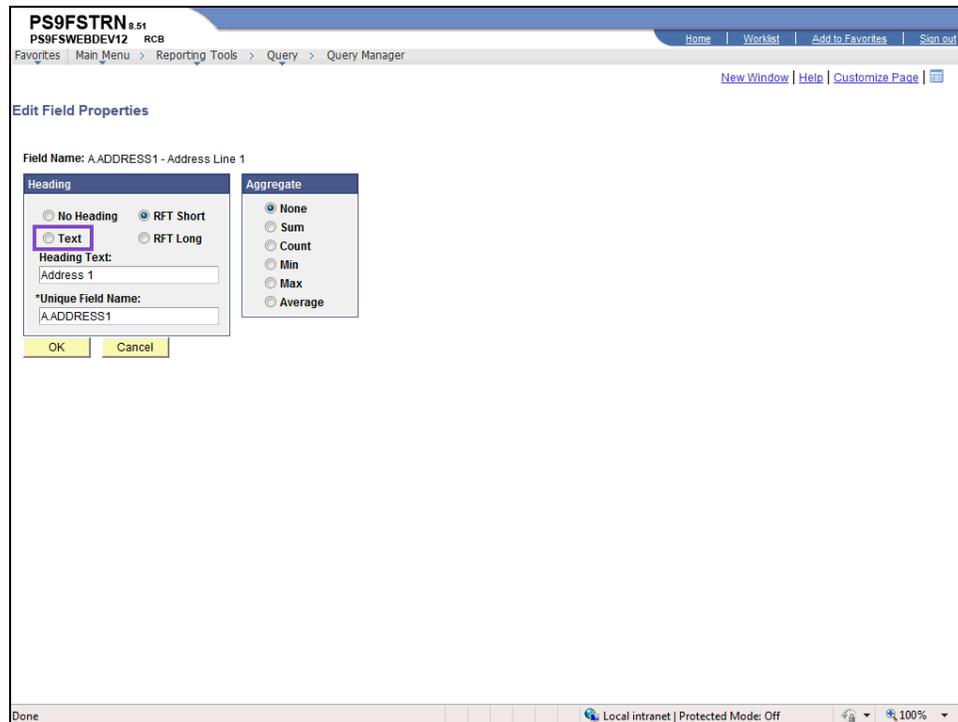
Step	Action
53.	Click the <b>Text</b> option.  <b>Text</b>
54.	Enter the desired information into the <b>Heading Text</b> field. Enter " <b>Vendor Name</b> ".
55.	Click the <b>OK</b> button. 

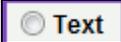
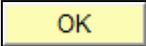
# Training Guide

## BRF\_Financials\_Query\_9\_1



Step	Action
56.	Click the <b>ADDRESS1 Edit</b> button. 



Step	Action
57.	Click the <b>Text</b> option. 
58.	Enter the desired information into the <b>Heading Text</b> field. Enter " <b>Address</b> ".
59.	Click the <b>OK</b> button. 

# Training Guide

## BRF\_Financials\_Query\_9\_1



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Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Reporting Tools > Query > Query Manager

Records | Query | Expressions | Prompts | Fields | Criteria | Having | View SQL | Run

Query Name: New Unsaved Query      Description:      Feed

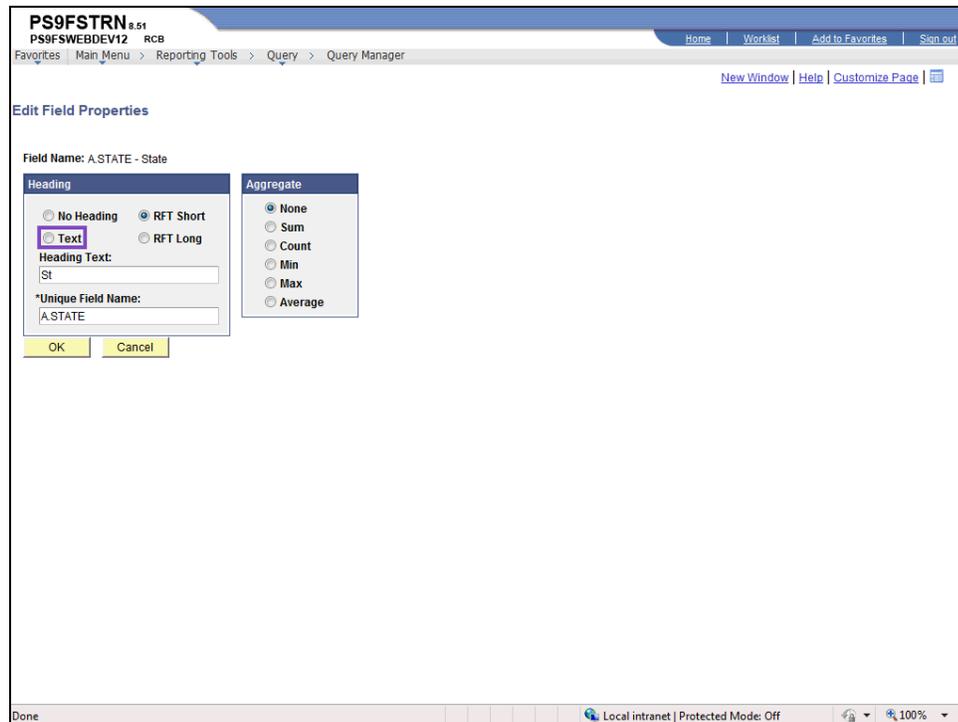
View field properties, or use field as criteria in query statement.      Reorder / Sort

Col	Record Fieldname	Format	Grp	XLAT	Aqa	Heading Text	Add Criteria	Edit	Delete
1	A.VENDOR_ID - Vendor ID	Char10				Vendor ID			
2	A.NAME1 - Name 1	Char40				Vendor Name			
3	A.ADDRESS1 - Address Line 1	Char55				Address			
4	A.CITY - City	Char30				City			
5	A.STATE - State	Char6				St			
6	A.POSTAL - Postal Code	Char12				Postal			
7	A.EFF_STATUS - Status as of Effective Date	Char1		N		Status			

Save    Save As    New Query    Preferences    Properties    Publish as Feed    New Union      Return To Search

Done      Local intranet | Protected Mode: Off      100%

Step	Action
60.	Click the <b>STATE Edit</b> button. 



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PS9FSWEBDEV12 RCB

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Favorites | Main Menu > Reporting Tools > Query > Query Manager

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### Edit Field Properties

Field Name: A.STATE - State

**Heading**

No Heading     RFT Short

Text             RFT Long

Heading Text:  
St

\*Unique Field Name:  
A.STATE

OK    Cancel

**Aggregate**

None

Sum

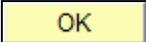
Count

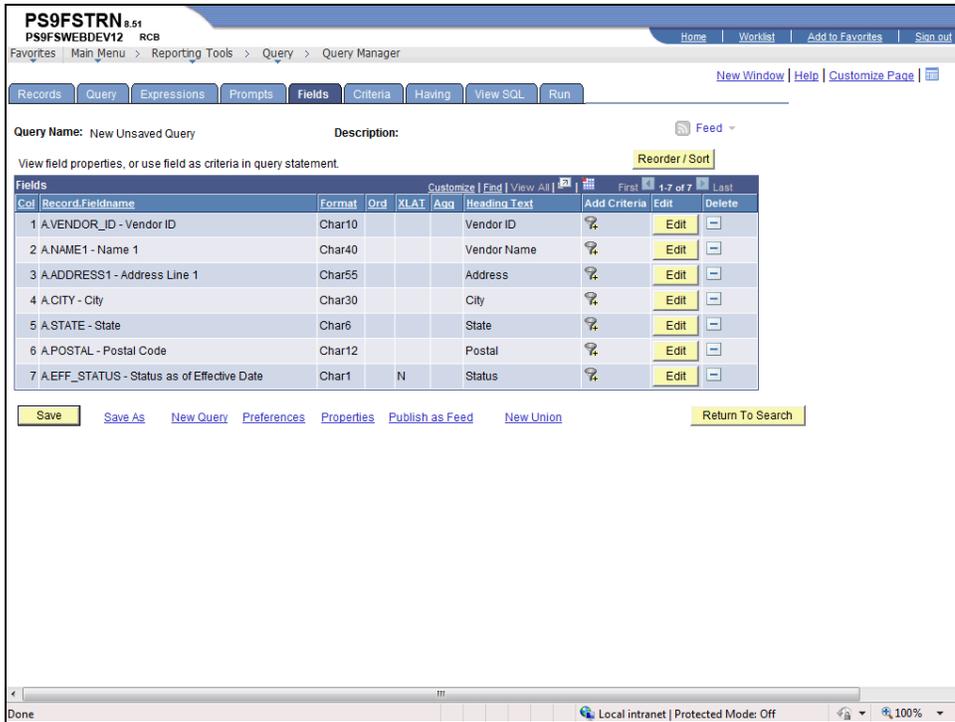
Min

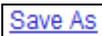
Max

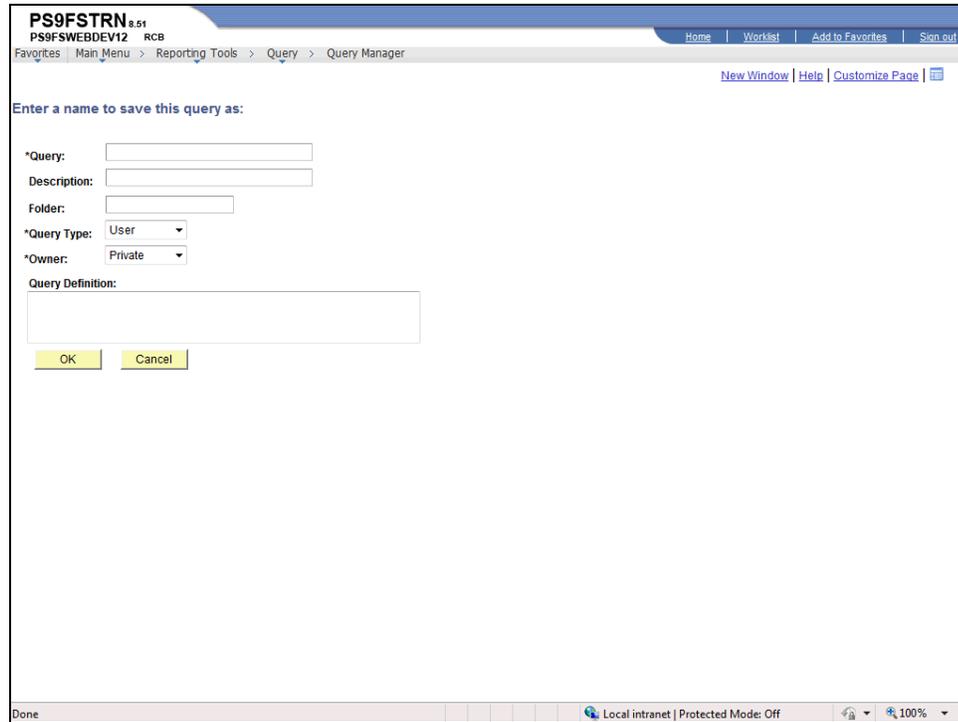
Average

Done    Local intranet | Protected Mode: Off    100%

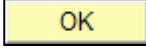
Step	Action
61.	Click the <b>Text</b> option. 
62.	Enter the desired information into the <b>Heading Text</b> field. Enter " <b>State</b> ".
63.	Click the <b>OK</b> button. 

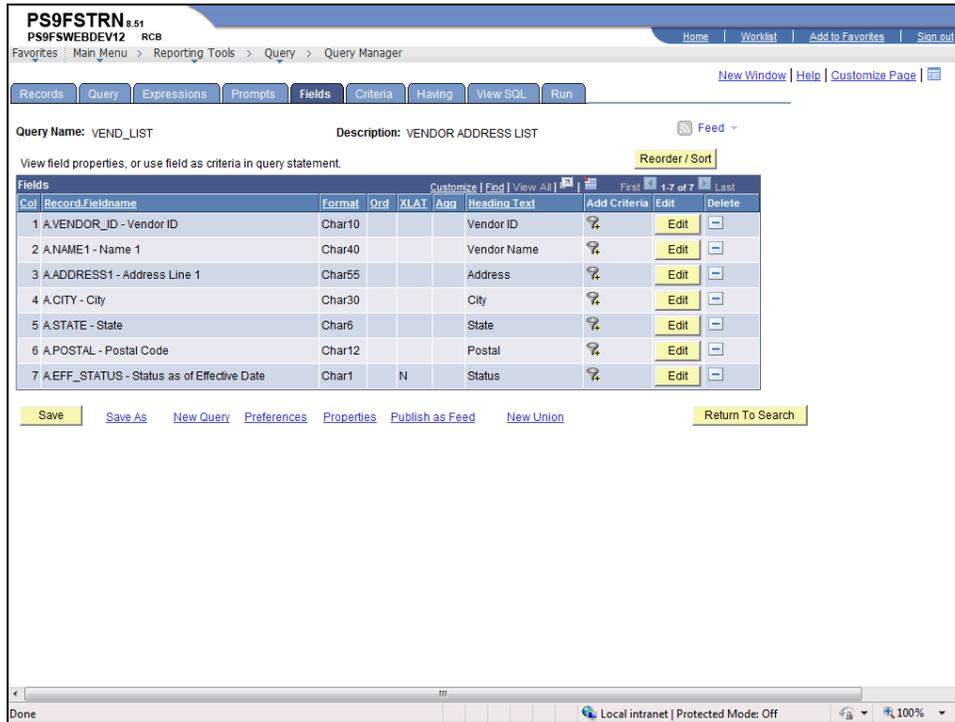


Step	Action
64.	<p>You <b>must</b> save your selections prior to running the query.</p> <p>Click the <b>Save As</b> link.</p> <p></p>
65.	<p>When you save the first time, you will name your query. Any queries you create <b>must</b> be saved as Private queries. If you modify a Public query, and wish to save the changes, it <b>must</b> be saved a Private query.</p>

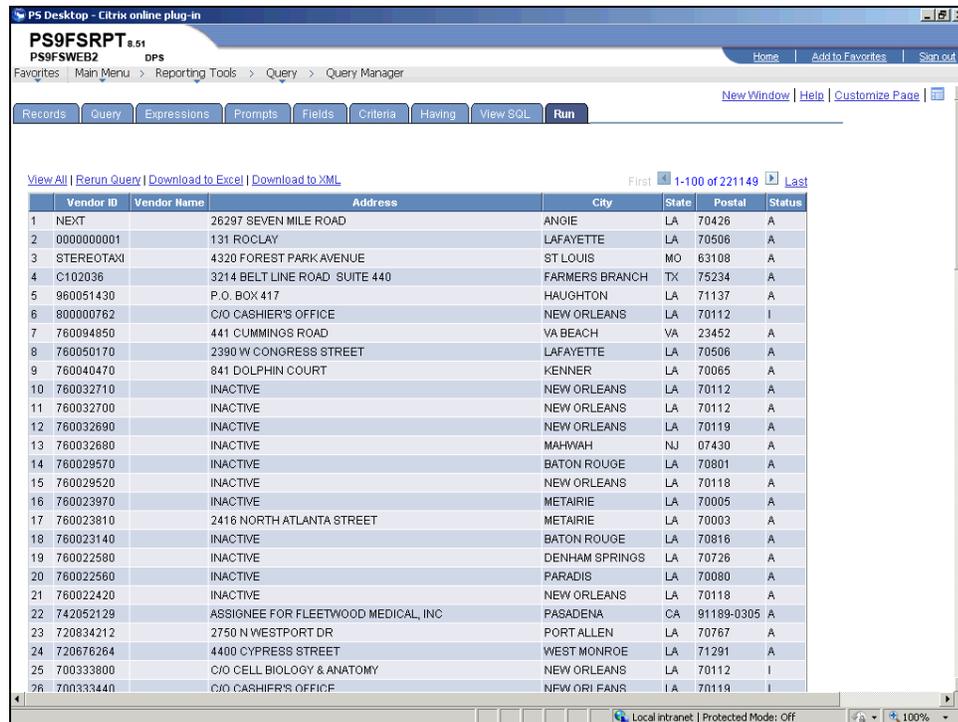


Step	Action
66.	<p>Query names <b>must</b> be entered in ALL CAPS. Names can be up to thirty (30) characters long. No spaces or special characters may be used in the name. An underscore can be used to separate words used in the query name.</p> <p>Enter the desired information into the <b>Query</b> field. Enter "<b>VEND_LIST</b>".</p>
67.	<p>A Description may be added. The Description is thirty (30) characters long and is not case sensitive.</p> <p>Enter the desired information into the <b>Description</b> field. Enter "<b>VENDOR ADDRESS LIST</b>".</p>
68.	<p>The Folder field is not used.</p> <p>The Query Type is always User.</p> <p>The Owner option defaults as Private and will remain as defaulted so that your query cannot accidentally be saved as a Public query.</p>
69.	<p>The Query Definition box is used to enter a longer description of the query. The use of Query Definition is optional. You can also enter the date you created your query in the Query Definition box.</p> <p>Enter the desired information into the <b>Query Definition</b> field. Enter "<b>THIS IS A LIST OF VENDOR ADDRESSES</b>".</p>

Step	Action
70.	Click the <b>OK</b> button. 

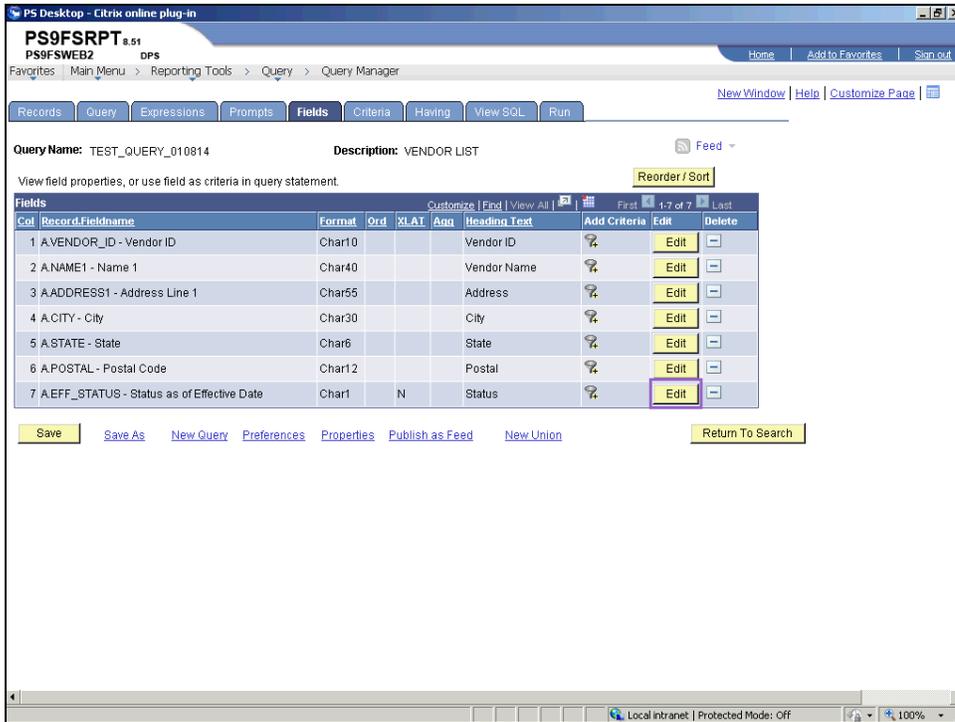


Step	Action
71.	The Run tab allows you to preview your query.  <i>NOTE: It is recommended the final query be run from the Query Manager than in the Run tab.</i>  Click the <b>Run</b> tab. 
72.	The query results display in HTML format. Data cannot be manipulated in HTML format. You can download the results to an Excel spreadsheet if you wish to make changes to the spreadsheet.
73.	221,149 results have been retrieved for your spreadsheet. The first 100 options display. You can use the arrows to move between pages, or use the Last and First links to view the Last 100 options and return to the First 100 options.  <i>NOTE: The number of results downloaded into Excel is limited. All 221,149 results will not download into Excel.</i>



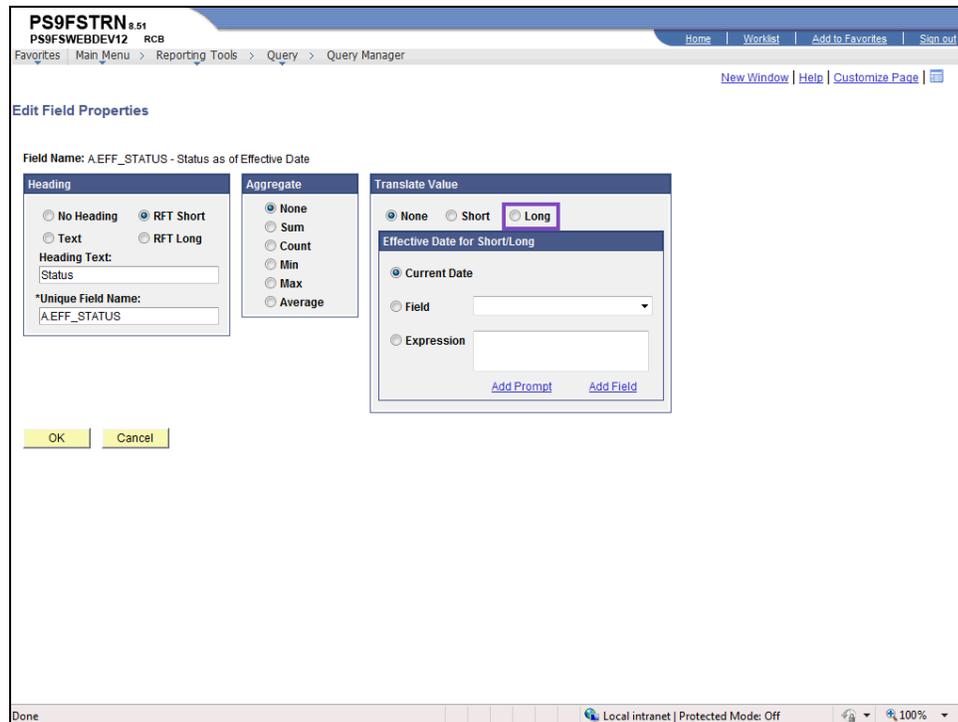
Vendor ID	Vendor Name	Address	City	State	Postal	Status
1	NEXT	26297 SEVEN MILE ROAD	ANGIE	LA	70426	A
2	0000000001	131 ROCLAY	LAFAYETTE	LA	70506	A
3	STEREOTAXI	4320 FOREST PARK AVENUE	ST LOUIS	MO	63108	A
4	C102036	3214 BELT LINE ROAD SUITE 440	FARMERS BRANCH	TX	75234	A
5	960051430	P.O. BOX 417	HAUGHTON	LA	71137	A
6	800000762	C/O CASHIER'S OFFICE	NEW ORLEANS	LA	70112	I
7	760094850	441 CUMMINGS ROAD	VA BEACH	VA	23452	A
8	760050170	2390 W CONGRESS STREET	LAFAYETTE	LA	70506	A
9	760040470	841 DOLPHIN COURT	KENNER	LA	70065	A
10	760032710	INACTIVE	NEW ORLEANS	LA	70112	A
11	760032700	INACTIVE	NEW ORLEANS	LA	70112	A
12	760032690	INACTIVE	NEW ORLEANS	LA	70119	A
13	760032680	INACTIVE	MAHWAH	NJ	07430	A
14	760029570	INACTIVE	BATON ROUGE	LA	70801	A
15	760029520	INACTIVE	NEW ORLEANS	LA	70118	A
16	760023970	INACTIVE	METAIRIE	LA	70005	A
17	760023810	2416 NORTH ATLANTA STREET	METAIRIE	LA	70003	A
18	760023140	INACTIVE	BATON ROUGE	LA	70816	A
19	760022580	INACTIVE	DENHAM SPRINGS	LA	70726	A
20	760022560	INACTIVE	PARADIS	LA	70080	A
21	760022420	INACTIVE	NEW ORLEANS	LA	70118	A
22	742052129	ASSIGNEE FOR FLEETWOOD MEDICAL, INC	PASADENA	CA	91189-0305	A
23	720834212	2750 N WESTPORT DR	PORT ALLEN	LA	70767	A
24	720676264	4400 CYPRESS STREET	WEST MONROE	LA	71291	A
25	700333800	C/O CELL BIOLOGY & ANATOMY	NEW ORLEANS	LA	70112	I
26	700333440	C/O CASHIER'S OFFICE	NEW ORLEANS	LA	70119	I

Step	Action
74.	Click the <b>Fields</b> tab. 
75.	A value in the XLAT column indicates a Translate Value may be being used. The Translate Value is an abbreviated code for a field's description.
76.	In this example, The EFF_STATUS has a XLAT value of "N". The XLAT column can contain one of the following values:  <b>N (None)</b> - Displays in the query results as a single character value and assumes a current date logic (i.e. Effective Date is equal to current date); <b>S (Short)</b> - Displays in the query results as a 10-character value and uses a specified effective date logic (i.e. Effective Date is equal to or less than current date; or <b>L (Long)</b> - Displays in the query results as a 30-character value and uses a specified effective date (i.e. Effective Date is equal to or less than current date).
77.	In this example, the XLAT value is "N", so the value in the column will display as a single letter in your query results: <b>A</b> = Active or <b>I</b> = Inactive.



Step	Action
78.	Click the EFF_STATUS <b>Edit</b> button.

Edit



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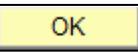
### Edit Field Properties

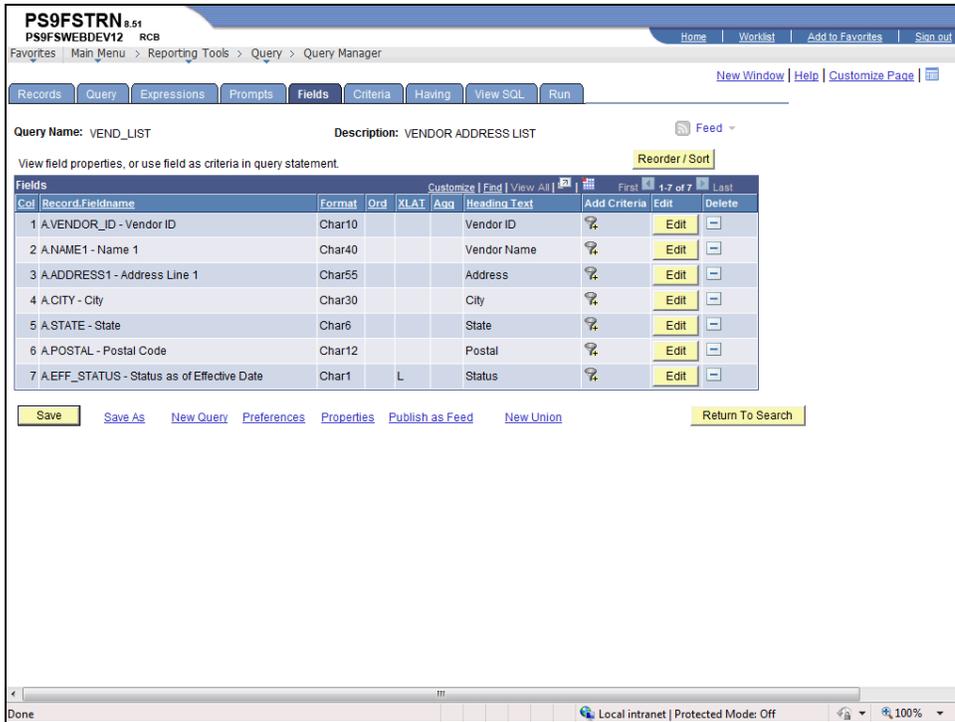
Field Name: AEFF\_STATUS - Status as of Effective Date

Heading	Aggregate	Translate Value
<input type="radio"/> No Heading <input checked="" type="radio"/> RFT Short <input type="radio"/> Text <input type="radio"/> RFT Long Heading Text: Status *Unique Field Name: AEFF_STATUS	<input checked="" type="radio"/> None <input type="radio"/> Sum <input type="radio"/> Count <input type="radio"/> Min <input type="radio"/> Max <input type="radio"/> Average	<input checked="" type="radio"/> None <input type="radio"/> Short <input checked="" type="radio"/> Long Effective Date for Short/Long <input checked="" type="radio"/> Current Date <input type="radio"/> Field <input type="radio"/> Expression <a href="#">Add Prompt</a>   <a href="#">Add Field</a>

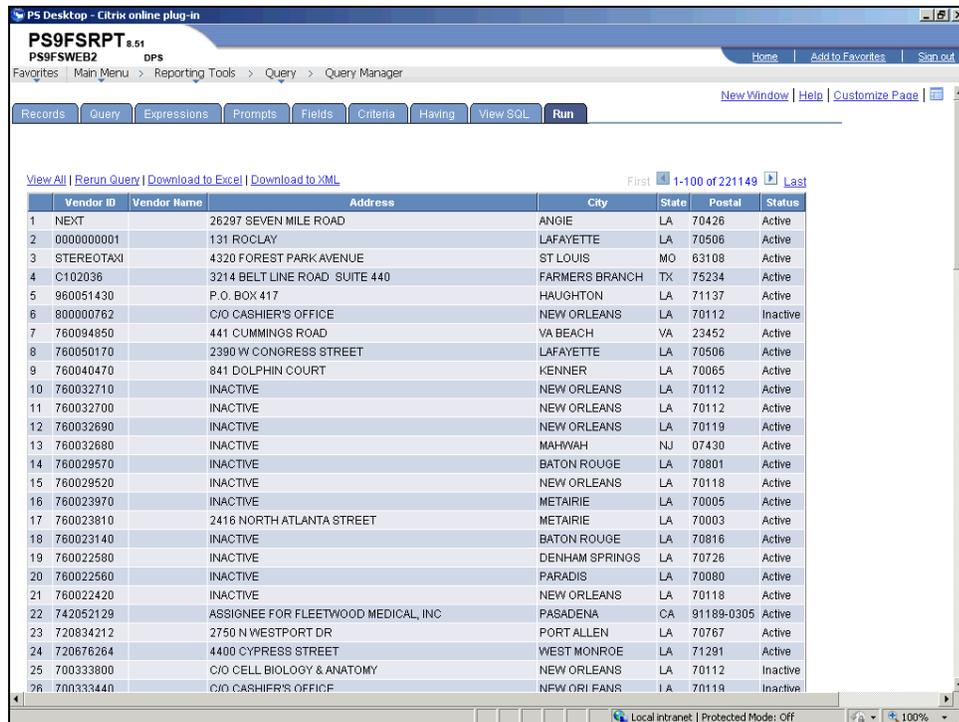
OK Cancel

Done Local intranet | Protected Mode: Off 100%

Step	Action
79.	Click the <b>Translate Value Long</b> option. 
80.	The Effective Date for Short/Long defaults as Current Date and will remain as defaulted.
81.	Click the <b>OK</b> button. 
82.	The EFF_STATUS row now displays an "L" in the XLAT column. By changing the Translate Value from "N" to "L", the query results will display "Active" instead of an "A", and "Inactive" instead of an "I" in the Status column.



Step	Action
83.	Click the <b>Run</b> tab. 
84.	The Status for each Vendor has changed from an "A" or "I" to "Active" or "Inactive".



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PS9FSWEB2 DPS  
Home | Add to Favorites | Sign out  
Favorites | Main Menu > Reporting Tools > Query > Query Manager  
New Window | Help | Customize Page

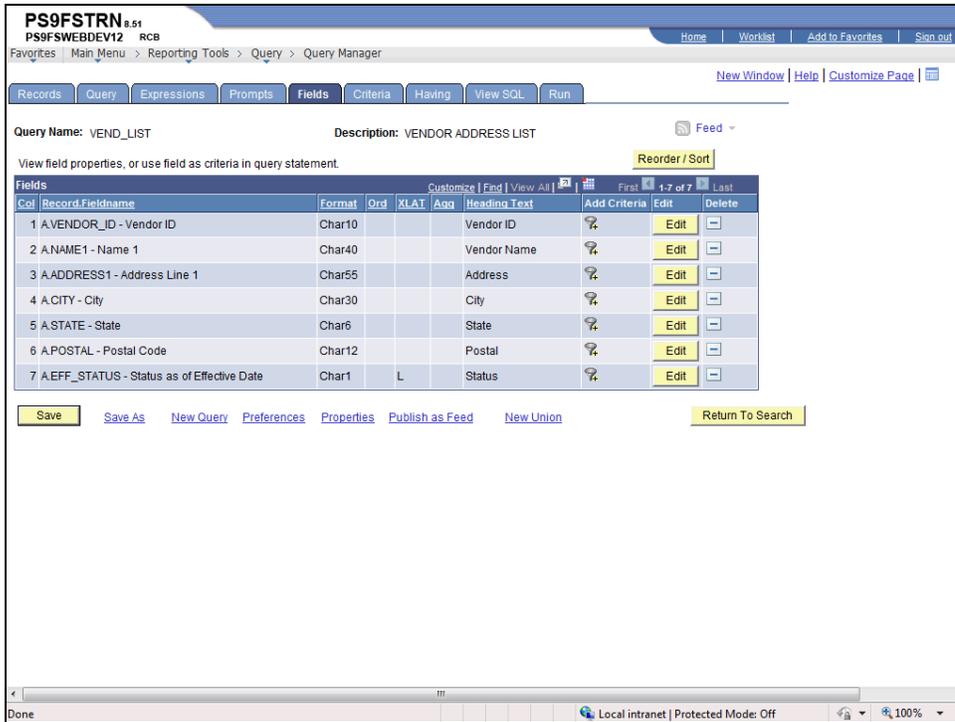
Records | Query | Expressions | Prompts | Fields | Criteria | Having | View SQL | Run

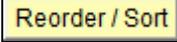
View All | Rerun Query | Download to Excel | Download to XML  
First 1-100 of 221149 Last

	Vendor ID	Vendor Name	Address	City	State	Postal	Status
1	NEXT		26297 SEVEN MILE ROAD	ANGIE	LA	70426	Active
2	0000000001		131 ROCLAY	LAFAYETTE	LA	70506	Active
3	STEREOTAXI		4320 FOREST PARK AVENUE	ST LOUIS	MO	63108	Active
4	C102036		3214 BELT LINE ROAD SUITE 440	FARMERS BRANCH	TX	75234	Active
5	960051430		P.O. BOX 417	HAUGHTON	LA	71137	Active
6	800000762		C/O CASHIER'S OFFICE	NEW ORLEANS	LA	70112	Inactive
7	760094850		441 CUMMINGS ROAD	VA BEACH	VA	23452	Active
8	760050170		2390 W CONGRESS STREET	LAFAYETTE	LA	70506	Active
9	760040470		841 DOLPHIN COURT	KENNER	LA	70065	Active
10	760032710		INACTIVE	NEW ORLEANS	LA	70112	Active
11	760032700		INACTIVE	NEW ORLEANS	LA	70112	Active
12	760032690		INACTIVE	NEW ORLEANS	LA	70119	Active
13	760032680		INACTIVE	MAHWAH	NJ	07430	Active
14	760029570		INACTIVE	BATON ROUGE	LA	70801	Active
15	760029520		INACTIVE	NEW ORLEANS	LA	70118	Active
16	760023970		INACTIVE	METAIRIE	LA	70005	Active
17	760023810		2416 NORTH ATLANTA STREET	METAIRIE	LA	70003	Active
18	760023140		INACTIVE	BATON ROUGE	LA	70816	Active
19	760022580		INACTIVE	DENHAM SPRINGS	LA	70726	Active
20	760022560		INACTIVE	PARADIS	LA	70080	Active
21	760022420		INACTIVE	NEW ORLEANS	LA	70118	Active
22	742052129		ASSIGNEE FOR FLEETWOOD MEDICAL, INC	PASADENA	CA	91189-0305	Active
23	720834212		2750 N WESTPORT DR	PORT ALLEN	LA	70767	Active
24	720676264		4400 CYPRESS STREET	WEST MONROE	LA	71291	Active
25	700333800		C/O CELL BIOLOGY & ANATOMY	NEW ORLEANS	LA	70112	Inactive
26	700333440		C/O CASHIER'S OFFICE	NEW ORLEANS	LA	70119	Inactive

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Step	Action
85.	Click the <b>Fields</b> tab. 



Step	Action
86.	<p>Just as you can Reorder the order in which fields (columns) display in your results, you can also Sort the data results for multiple fields.</p> <p>Click the <b>Reorder/Sort</b> button.</p> 
87.	<p>Currently your results display by Vendor ID in ascending order.</p> <p>In this example, you will sort results by State and then by City. You will enter a "1" into the New Order box to the right of the State field, and a "2" into the New Order box for City.</p> <p>By making these changes, your results will sort first by Vendor Name in ascending order. If there is more than one Vendor with the same name, then the results will sort by City in ascending order.</p>
88.	<p>If you wish to sort your results in descending order, check the box in the Descending checkbox for the desired field. If Descending is selected, the D1 will display in the Ord column on the Field tab to denote results will display in descending order.</p>

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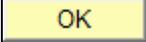
### Edit Field Ordering

Reorder columns by entering column numbers on the left. Columns left blank or assigned a 0 will be automatically assigned a number. Change the order by number by entering numbers on the right. To remove an order by number, leave the field blank or enter a 0.

New Column	Column	Record.Fieldname	Order By	Descending	New Order By
	1	A.VENDOR_ID - Vendor ID		<input type="checkbox"/>	
	2	A.NAME1 - Name 1		<input type="checkbox"/>	
	3	A.ADDRESS1 - Address Line 1		<input type="checkbox"/>	
	4	A.CITY - City		<input type="checkbox"/>	
	5	A.STATE - State		<input type="checkbox"/>	
	6	A.POSTAL - Postal Code		<input type="checkbox"/>	
	7	A.EFF_STATUS - Status as of Effective Date		<input type="checkbox"/>	

Done

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Step	Action
89.	Enter the desired information into the <b>EFF_STATUS - New Order By</b> field. Enter "1".
90.	Click the <b>OK</b> button. 
91.	The Ord column now displays a "1" for the EFF_STATUS field.  You query results will now sort by whether the vendor is Active or Inactive.

# Training Guide

## BRF\_Financials\_Query\_9\_1



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Records | Query | Expressions | Prompts | Fields | Criteria | Having | View SQL | Run

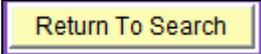
Query Name: VEND\_LIST      Description: VENDOR ADDRESS LIST      Feed

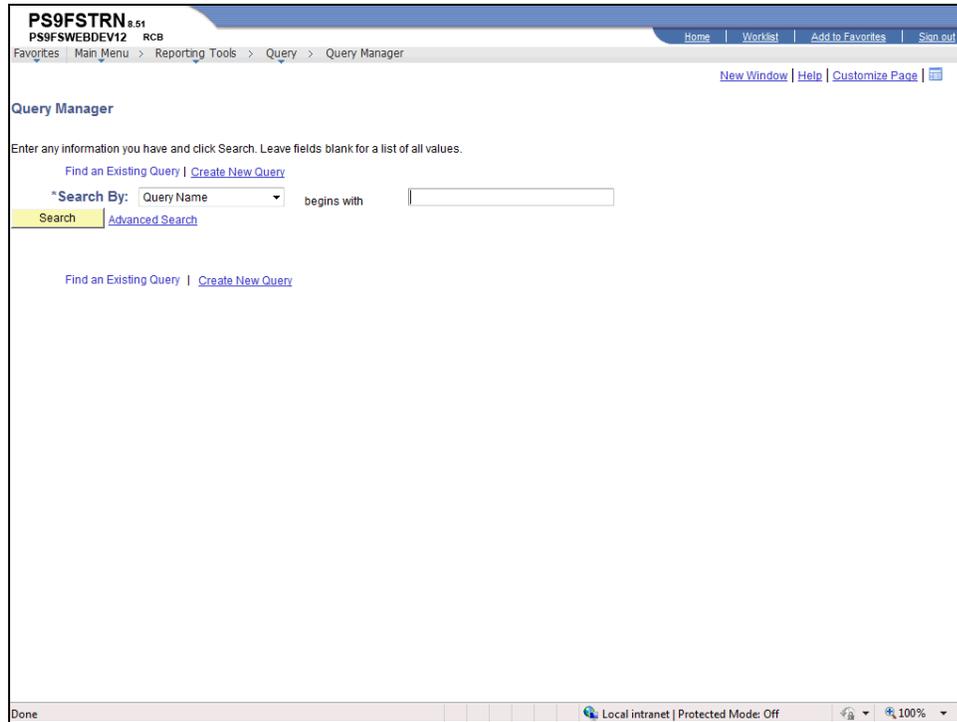
View field properties, or use field as criteria in query statement.      Reorder / Sort

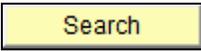
Col	Record.FieldName	Format	Grp	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.VENDOR_ID - Vendor ID	Char10				Vendor ID		Edit	
2	A.NAME1 - Name 1	Char40				Vendor Name		Edit	
3	A.ADDRESS1 - Address Line 1	Char55				Address		Edit	
4	A.CITY - City	Char30				City		Edit	
5	A.STATE - State	Char6				State		Edit	
6	A.POSTAL - Postal Code	Char12				Postal		Edit	
7	A.EFF_STATUS - Status as of Effective Date	Char1	1	L		Status		Edit	

Save    Save As    New Query    Preferences    Properties    Publish as Feed    New Union      Return To Search

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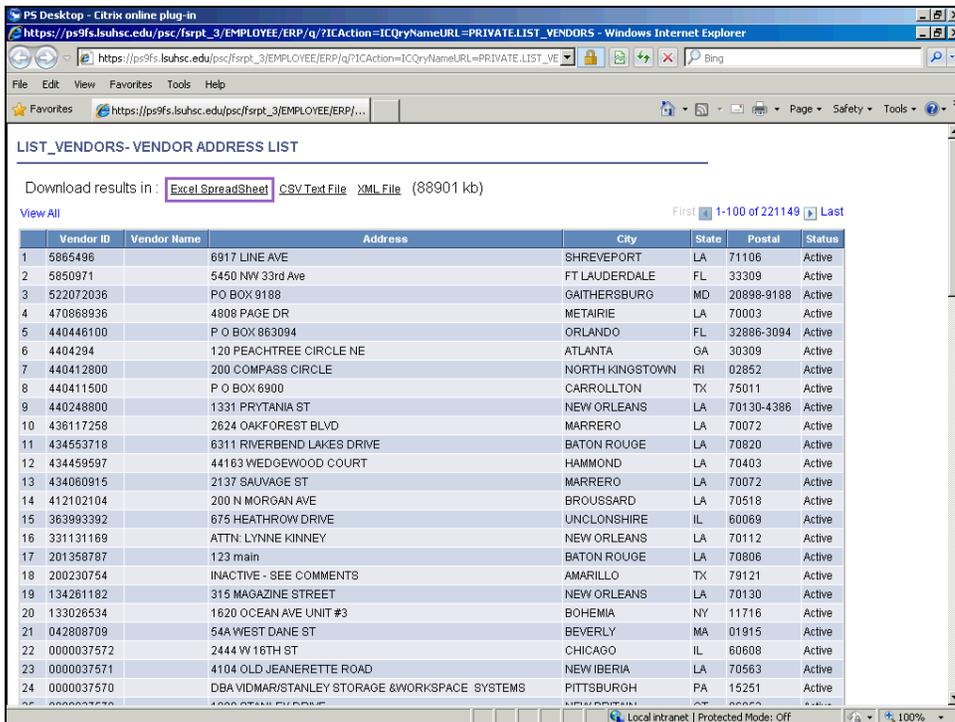
Step	Action
92.	Click the <b>Save</b> button. 
93.	Click the <b>Return To Search</b> button. 



Step	Action
94.	Enter the desired information into the <b>Search By</b> field. Enter " <b>VEND</b> ".
95.	Click the <b>Search</b> button. 
96.	Once all changes have been made to your query, you will run your query from the Query Manager page.  Any private queries associated with your user id will display first in your search results.  Click the <b>VEND_LIST HTML</b> link. 

# Training Guide

## BRF\_Financials\_Query\_9\_1



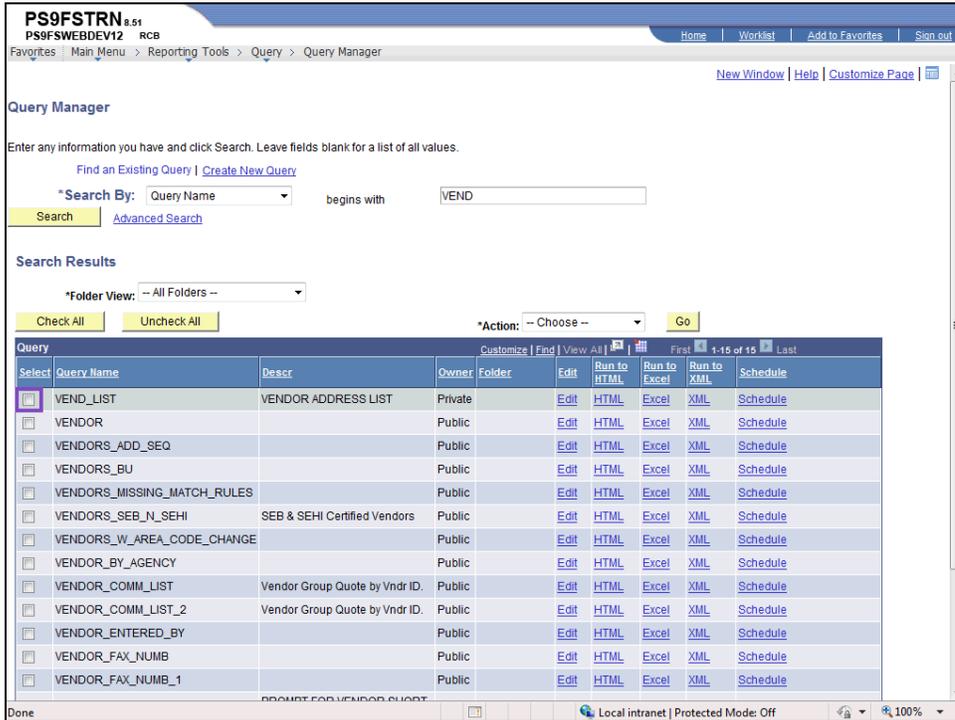
Step	Action
97.	<p>You can download your results into an Excel spreadsheet if you wish to manipulate your query results.</p> <p>Click the <b>Excel Spreadsheet</b> link.</p> <p><a href="#">Excel SpreadSheet</a></p>
98.	<p><b>NOTE:</b> A message displays in red on Line 1 stating the query results are too large and not all results were downloaded.</p>

Vendor ID	Vendor Name	Address	City	State	Postal
5865496		6917 LINE AVE	SHREVEPORT	LA	71106
5850971		5450 NW 33rd Ave	FT LAUDERDALE	FL	33309
522072036		PO BOX 9188	GAITHERSBURG	MD	20898-9188
470868936		4808 PAGE DR	METAIRIE	LA	70003
440446100		P O BOX 863094	ORLANDO	FL	32886-3094
4404294		120 PEACHTREE CIRCLE NE	ATLANTA	GA	30309
440412800		200 COMPASS CIRCLE	NORTH KINGSTOWN	RI	02852
440411500		P O BOX 6900	CARROLLTON	TX	75011
440248800		1331 PRYTANIA ST	NEW ORLEANS	LA	70130-4386
436117258		2624 OAKFOREST BLVD	MARRERO	LA	70072
434553718		6311 RIVERBEND LAKES DRIVE	BATON ROUGE	LA	70820
434459597		44163 WEDGEWOOD COURT	HAMMOND	LA	70403
434060915		2137 SAUVAGE ST	MARRERO	LA	70072
412102104		200 N MORGAN AVE	BROUSSARD	LA	70518
363993392		675 HEATHROW DRIVE	UNCLONSHIRE	IL	60069
331131169		ATTN: LYNNE KINNEY	NEW ORLEANS	LA	70112
201358787		123 main	BATON ROUGE	LA	70806
200230754		INACTIVE - SEE COMMENTS	AMARILLO	TX	79121
134261182		315 MAGAZINE STREET	NEW ORLEANS	LA	70130
133026534		1620 OCEAN AVE UNIT #3	BOHEMIA	NY	11716
042808709		54A WEST DANE ST	BEVERLY	MA	01915
0000037572		2444 W 16TH ST	CHICAGO	IL	60608
0000037571		4104 OLD JEANERETTE ROAD	NEW IBERIA	LA	70563
0000037570		DBA VIDMAR/STANLEY STORAGE &WORKSPACE SYSTEMS	PITTSBURGH	PA	15251

Step	Action
99.	Click the <b>Close</b> button. 

Vendor ID	Vendor Name	Address	City	State	Postal	Status
1	5865496	6917 LINE AVE	SHREVEPORT	LA	71106	Active
2	5850971	5450 NW 33rd Ave	FT LAUDERDALE	FL	33309	Active
3	522072036	PO BOX 9188	GAITHERSBURG	MD	20898-9188	Active
4	470868936	4808 PAGE DR	METAIRIE	LA	70003	Active
5	440446100	P O BOX 863094	ORLANDO	FL	32886-3094	Active
6	4404294	120 PEACHTREE CIRCLE NE	ATLANTA	GA	30309	Active
7	440412800	200 COMPASS CIRCLE	NORTH KINGSTOWN	RI	02852	Active
8	440411500	P O BOX 6900	CARROLLTON	TX	75011	Active
9	440248800	1331 PRYTANIA ST	NEW ORLEANS	LA	70130-4386	Active
10	436117258	2624 OAKFOREST BLVD	MARRERO	LA	70072	Active
11	434553718	6311 RIVERBEND LAKES DRIVE	BATON ROUGE	LA	70820	Active
12	434459597	44163 WEDGEWOOD COURT	HAMMOND	LA	70403	Active
13	434060915	2137 SAUVAGE ST	MARRERO	LA	70072	Active
14	412102104	200 N MORGAN AVE	BROUSSARD	LA	70518	Active
15	363993392	675 HEATHROW DRIVE	UNCLONSHIRE	IL	60069	Active
16	331131169	ATTN: LYNNE KINNEY	NEW ORLEANS	LA	70112	Active
17	201358787	123 main	BATON ROUGE	LA	70806	Active
18	200230754	INACTIVE - SEE COMMENTS	AMARILLO	TX	79121	Active
19	134261182	315 MAGAZINE STREET	NEW ORLEANS	LA	70130	Active
20	133026534	1620 OCEAN AVE UNIT #3	BOHEMIA	NY	11716	Active
21	042808709	54A WEST DANE ST	BEVERLY	MA	01915	Active
22	0000037572	2444 W 16TH ST	CHICAGO	IL	60608	Active
23	0000037571	4104 OLD JEANERETTE ROAD	NEW IBERIA	LA	70563	Active
24	0000037570	DBA VIDMAR/STANLEY STORAGE &WORKSPACE SYSTEMS	PITTSBURGH	PA	15251	Active

Step	Action
100.	Click the <b>Close</b> button. 



Step	Action
101.	The VENDOR_LIST query can be added to My Favorite Queries for easy access in the future.  Click the <b>Checkbox</b> to select the VENDOR_LIST option. 

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### Query Manager

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

[Find an Existing Query](#) | [Create New Query](#)

\*Search By: Query Name  begins with

[Advanced Search](#)

### Search Results

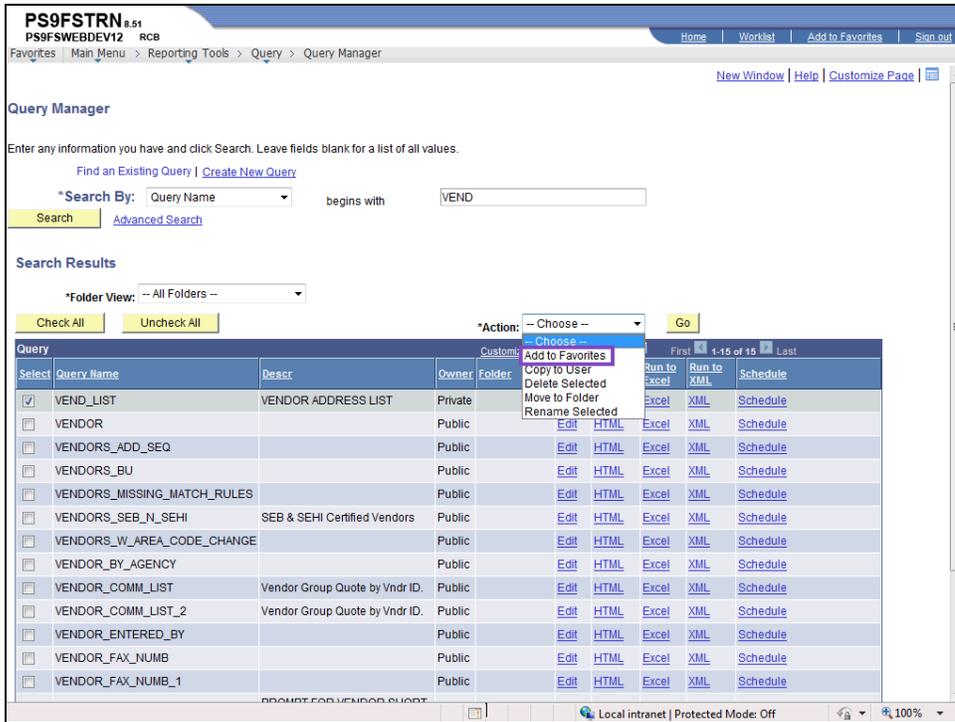
\*Folder View: -- All Folders --

\*Action: -- Choose --

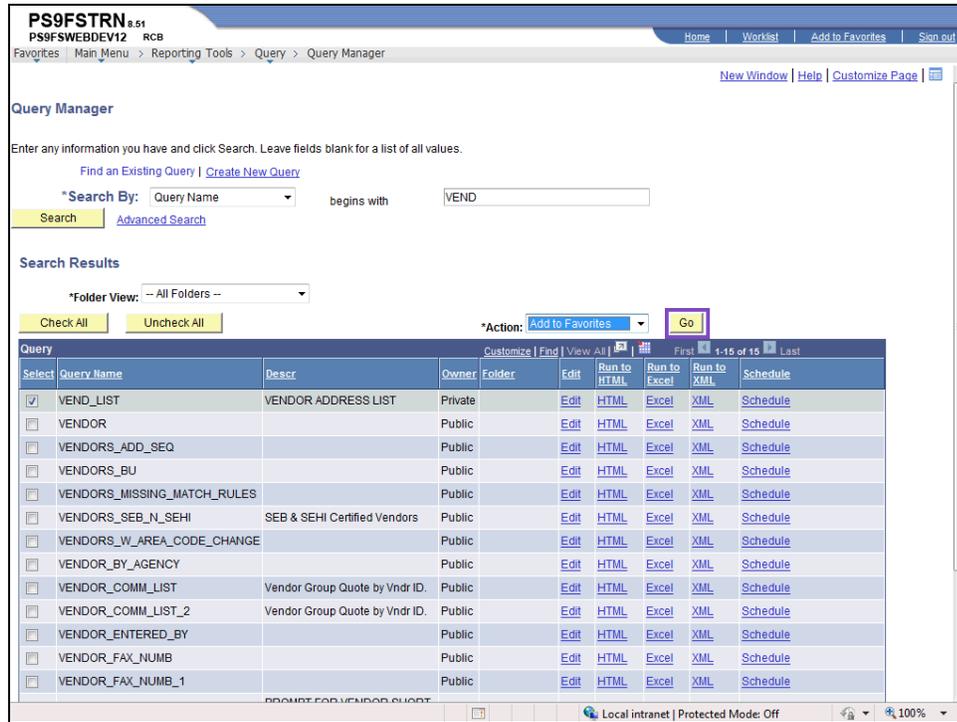
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input checked="" type="checkbox"/>	VEND_LIST	VENDOR ADDRESS LIST	Private		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	VENDOR		Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	VENDORS_ADD_SEQ		Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	VENDORS_BU		Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	VENDORS_MISSING_MATCH_RULES		Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	VENDORS_SEB_N_SEHI	SEB & SEHI Certified Vendors	Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	VENDORS_W_AREA_CODE_CHANGE		Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	VENDOR_BY_AGENCY		Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	VENDOR_COMM_LIST	Vendor Group Quote by Vndr ID.	Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	VENDOR_COMM_LIST_2	Vendor Group Quote by Vndr ID.	Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	VENDOR_ENTERED_BY		Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	VENDOR_FAX_NUMB		Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	VENDOR_FAX_NUMB_1		Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>

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Step	Action
102.	Click the button to the right of the <b>Action</b> field. 



Step	Action
103.	<p>Click the <b>Add to Favorites</b> option.</p> <p><i>NOTE: Your security permissions will determine the options available in the Action list.</i></p> <p><b>Add to Favorites</b></p>



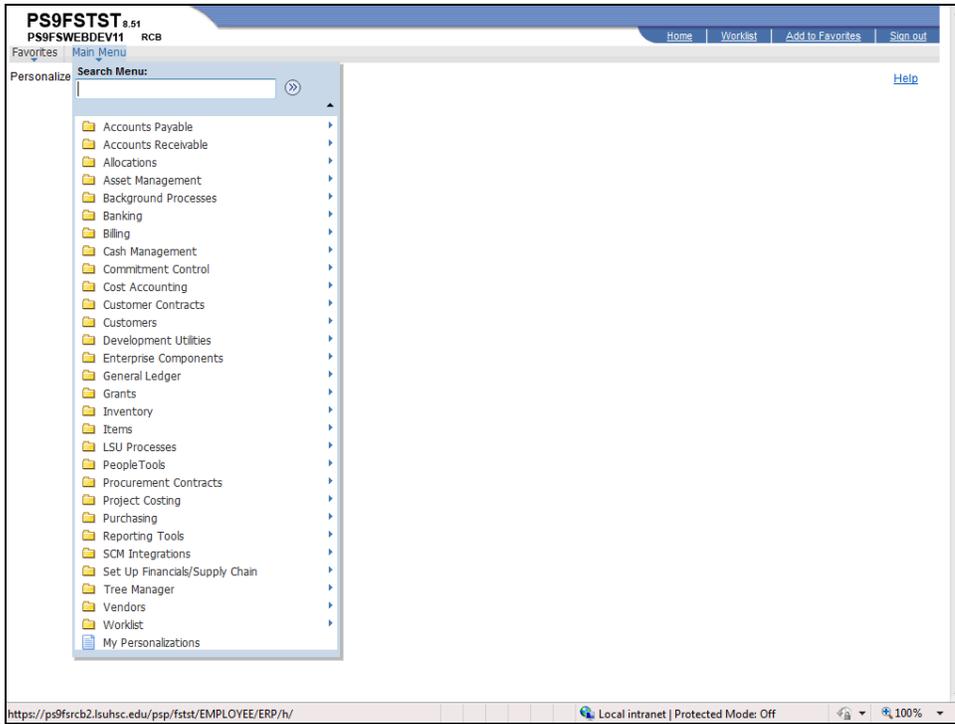
Step	Action
104.	Click the <b>Go</b> button. 
105.	Your query is added to My Favorite Queries and displaces at the bottom of the page. When you next navigate to Query, the My Favorite Queries section will display automatically on the Query Manager Search page. You will not need to use the Search By option to run this query in the future.
106.	This completes <i>Create and Format a Query</i> . <b>End of Procedure.</b>

## Exercise 4

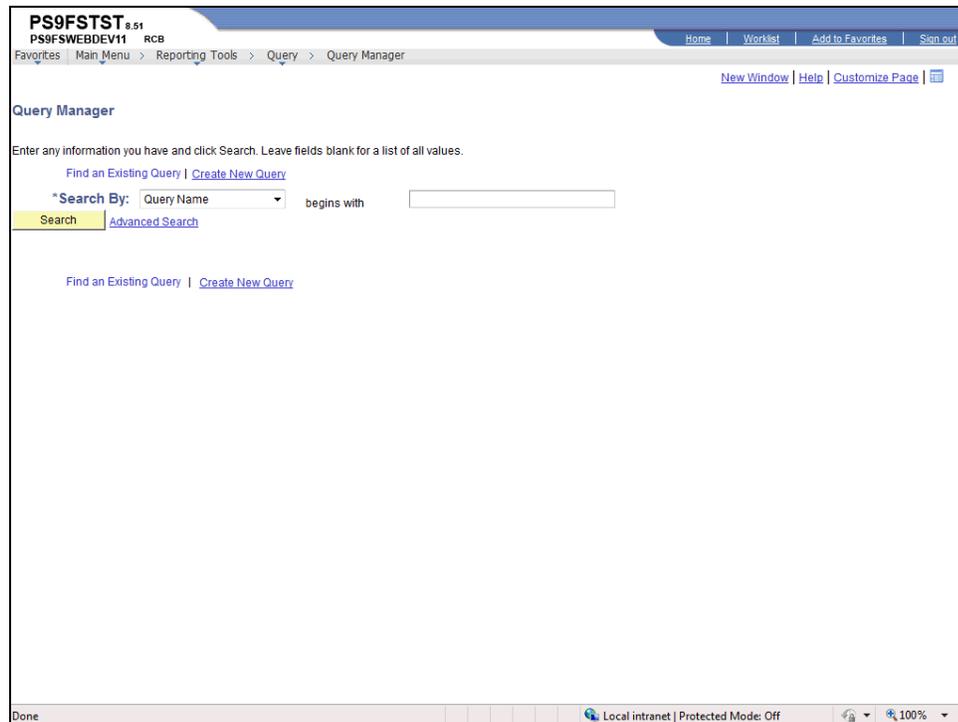
### Create a Query Using Criteria Components

#### Procedure

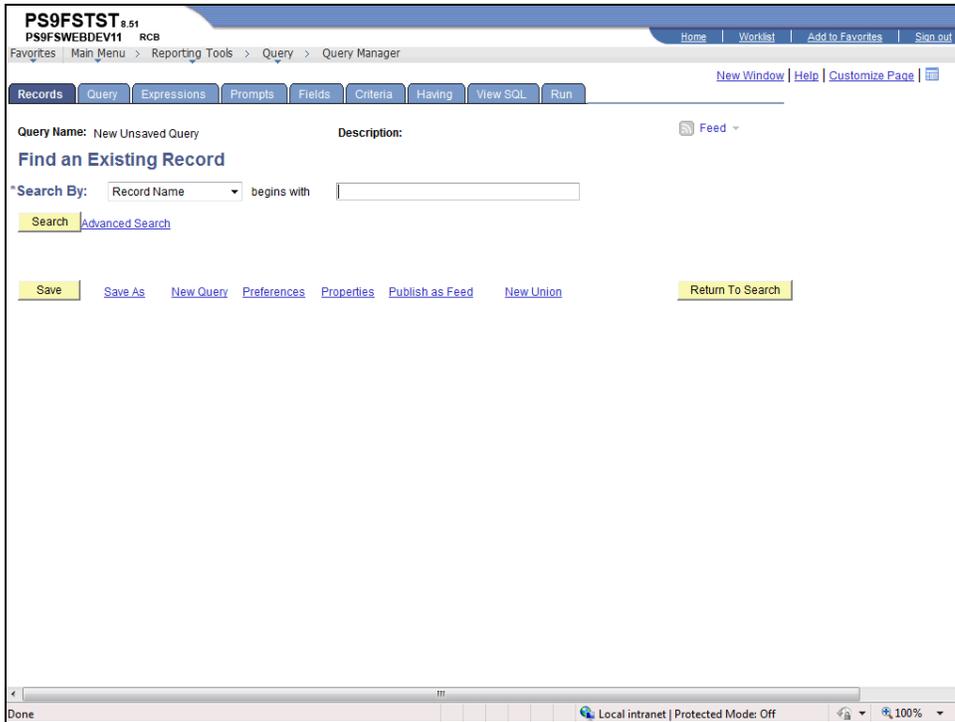
In this topic you will learn how to **Create a Query Using Criteria Components**.



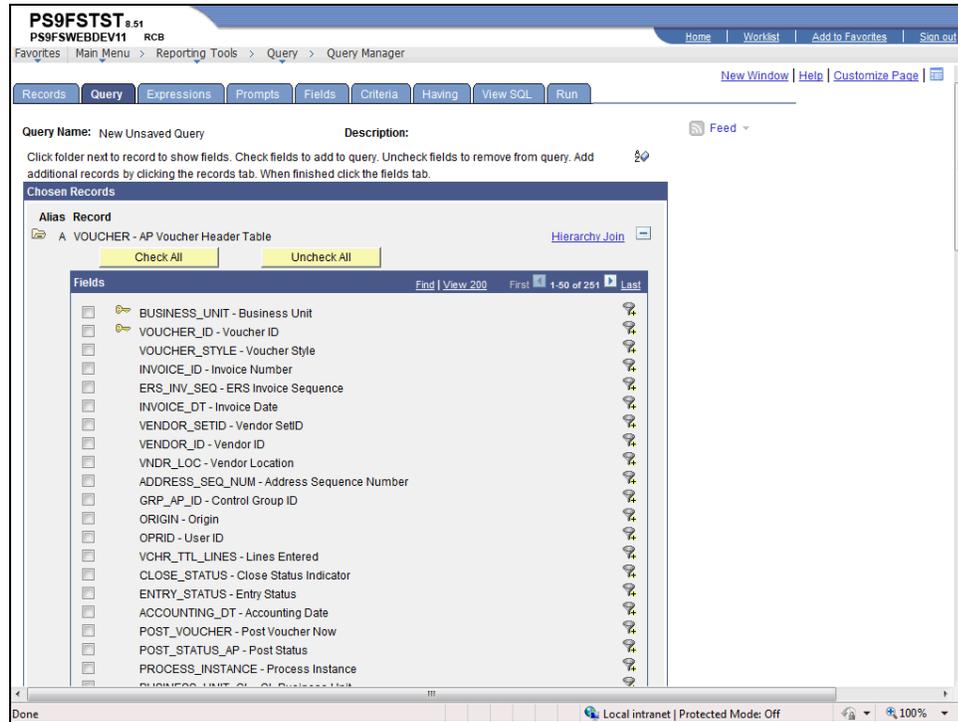
Step	Action
1.	Select the Main Menu link then click the <b>Reporting Tools</b> menu. 
2.	Click the <b>Query</b> menu. 
3.	Click the <b>Query Manager</b> link. 



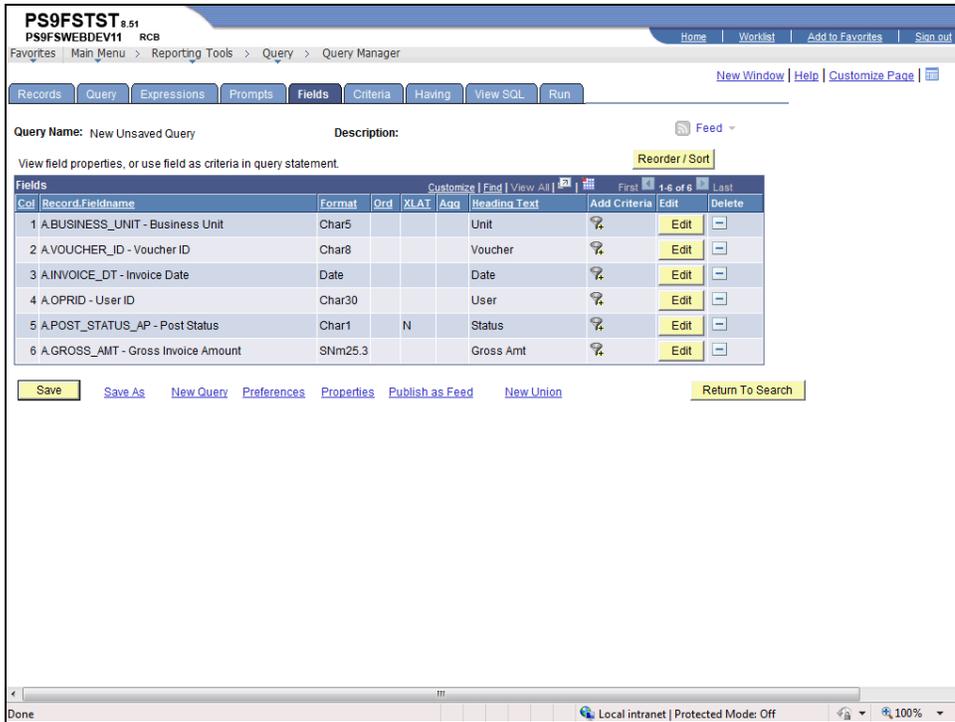
Step	Action
4.	Click the <b>Create New Query</b> link. <a href="#">Create New Query</a>
5.	Defining Criteria allows you to: <ol style="list-style-type: none"> <li>1. Reduce the number of rows of data returned in your results, and</li> <li>2. Retrieve only the data you need at the time the query runs.</li> </ol>
6.	In this exercise, you will create a query listing Average Gross Vouchers for the time period 11/01/2013 through 11/30/2013. The following Criteria will be applied: <ol style="list-style-type: none"> <li>1. Business Unit constant;</li> <li>2. Invoice Date between 11/01/2013 and 11/30/2013; and</li> <li>3. Post Status AP of Posted.</li> </ol>



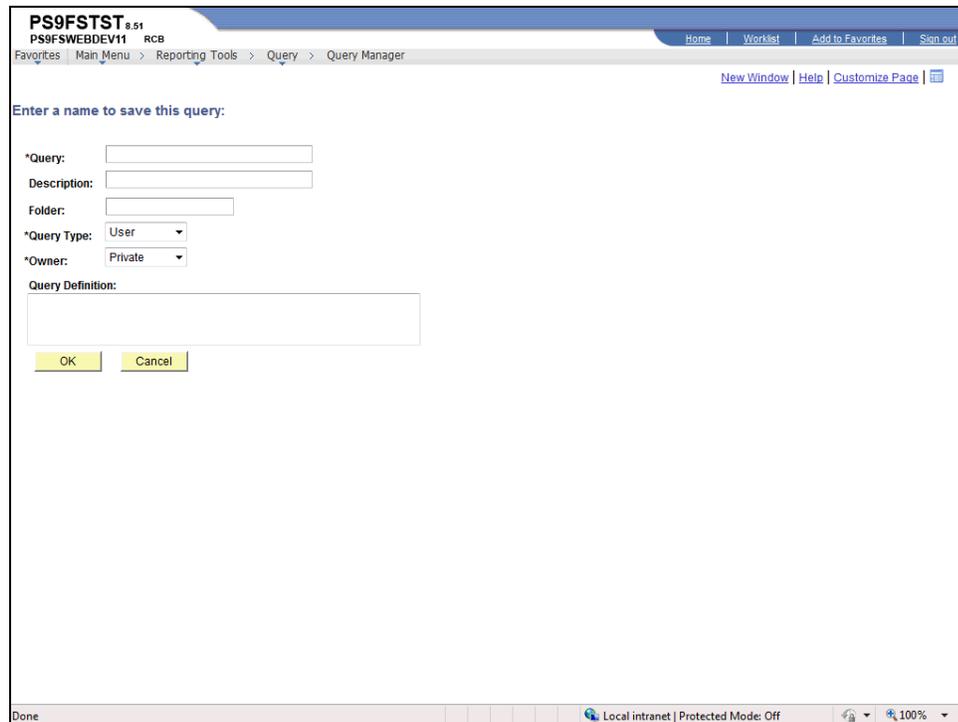
Step	Action
7.	Enter the desired information into the <b>begins with</b> field. Enter " <b>VOUCHER</b> ".
8.	Click the <b>Search</b> button. 
9.	You are interested in retrieving data on AP vouchers, so the VOUCHER_AP option will be selected.  Click the <b>Add Record</b> link. 

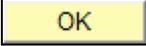


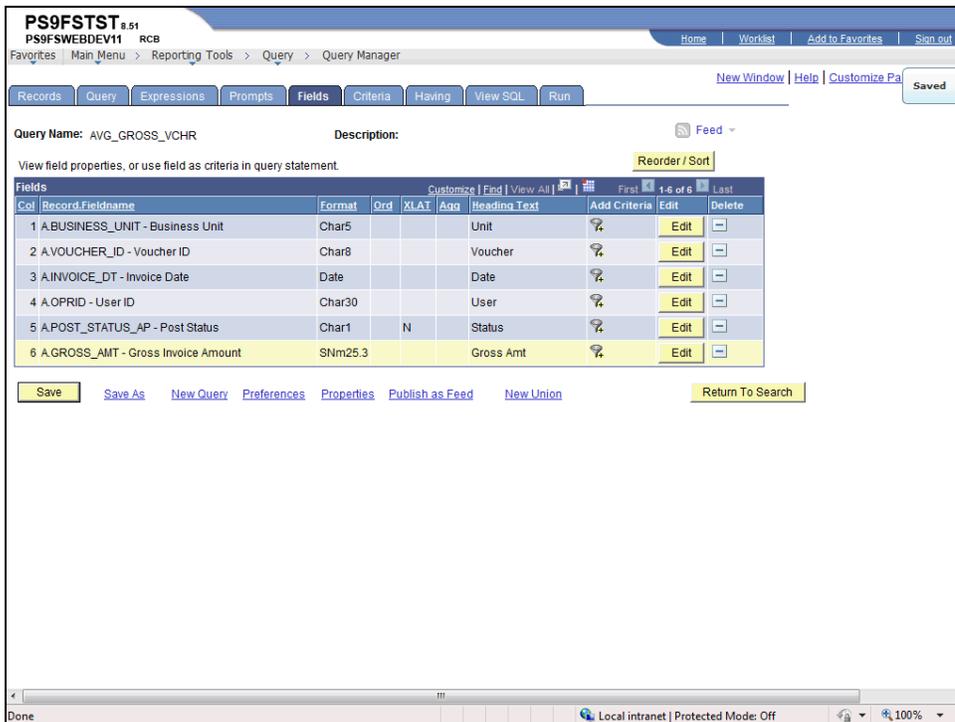
Step	Action
10.	<p>You are transferred to the Query tab.</p> <p>Select a field by clicking the checkbox to the left of the Field Name.</p> <p>Click the <b>BUSINESS_UNIT</b> field.</p> <input type="checkbox"/>
11.	<p>Click the <b>VOUCHER_ID</b> field</p> <input type="checkbox"/>
12.	<p>Click the <b>INVOICE_DT</b> field.</p> <input type="checkbox"/>
13.	<p>Click the <b>OPRID</b> field.</p> <input type="checkbox"/>
14.	<p>Click the <b>POST_STATUS_AP</b> and the <b>GROSS_AMT</b> fields.</p> <input type="checkbox"/>
15.	<p>Click the <b>Fields</b> tab.</p> <input type="button" value="Fields"/>
16.	<p>You can return to the Query tab to add or delete field.</p> <p>Fields may be deleted on the Fields tab by clicking the Delete button (-). However, fields cannot be added on the Fields tab.</p>



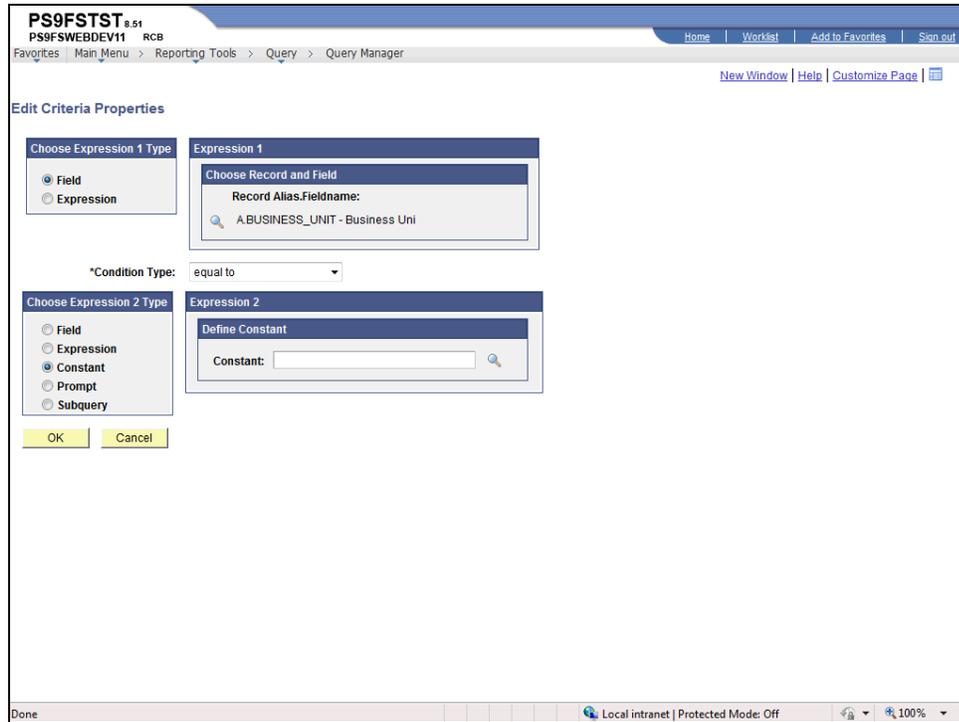
Step	Action
17.	<p>Click the <b>Save</b> button.</p> <p><b>NOTE:</b> <i>The query must be named when saved for the first time. The query <u>must</u> be saved as a Private query. If a Public query is modified, you must save the modified query as a Private query.</i></p> <p><b>Save</b></p>



Step	Action
18.	Enter the desired information into the <b>Query</b> field. Enter " <b>AVG_GROSS_VCHR</b> ".
19.	If desired, enter a longer description of the query in the Query Definition box.  Enter the desired information into the <b>Query Definition</b> field. Enter " <b>AVERAGE GROSS VOUCHER</b> ".
20.	Click the <b>OK</b> button. 
21.	Criteria are added to a query to filter or limit the results bases on specified parameters. There are three (3) methods for adding criteria to a query. Each method will be demonstrated in this topic. The methods are:  Method 1 - Add criteria from the Fields tab; Method 2 - Add criteria from the Criteria tab; and/or Method 3 - Add criteria from the Query tab.



Step	Action
22.	<p><b>Method 1</b> - Add criteria from the Fields tab</p> <p>In this example, Business Unit will be specified using a constant value to filter the query results.</p> <p>Click the <b>Add Criteria</b> button to the right of the BUSINESS_UNIT field.</p> 
23.	Changes can be made to any of the components on the Edit Criteria Properties panel. For this example, the Choose Expression 1 Type, Choose Expression 2 Type and Expression 1, Condition Type will remain as defaulted.
24.	By selecting the Add Criteria funnel for the BUSINESS_UNIT field on the Fields tab, the fields name defaults into Expression 1.
25.	The Condition Type determines how a query compares values specified in Expression 1 and Expression 2. In this example you want to specify a Business Unit, so the Condition Type will remain "equal to". Other Condition Type options are available and will be demonstrated later in the topic.
26.	Expression 2 defaults to the Constant option. Other options are available for Expression 2 and will be demonstrated later in this topic. For this example a single Business Unit will be specified as the Constant, so the system will retrieve data for the specified Business Unit only. If the Business Unit designation is unknown, click the Select Constant From List (magnifying glass) button.



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**Edit Criteria Properties**

Choose Expression 1 Type

Field  
 Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:

A.BUSINESS\_UNIT - Business Uni

\*Condition Type: equal to

Choose Expression 2 Type

Field  
 Expression  
 Constant  
 Prompt  
 Subquery

Expression 2

Define Constant

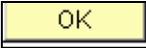
Constant:

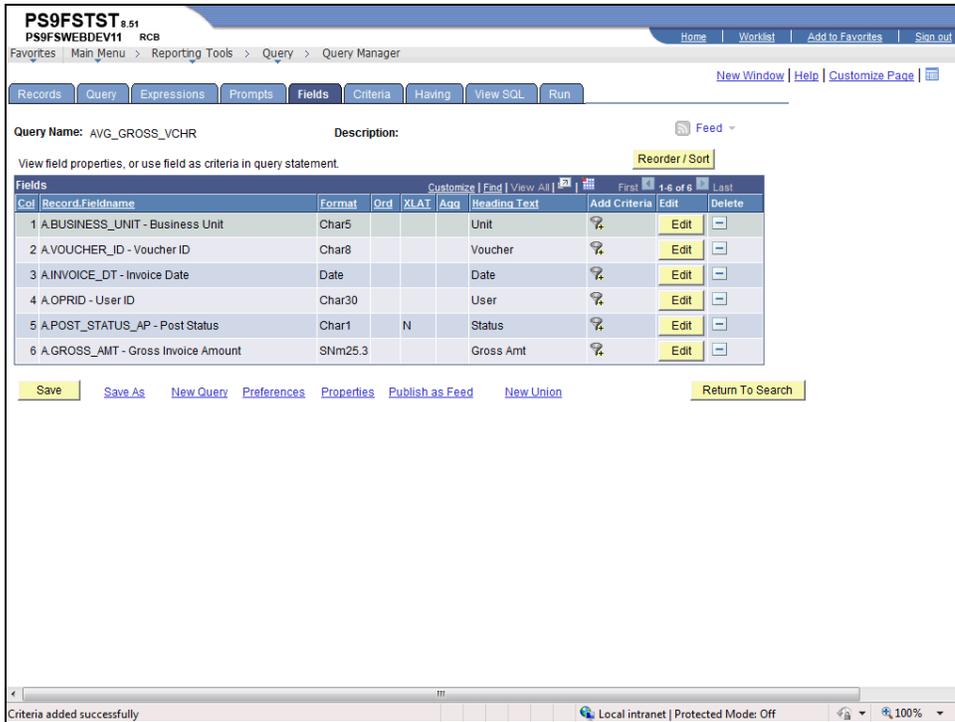
OK Cancel

Done

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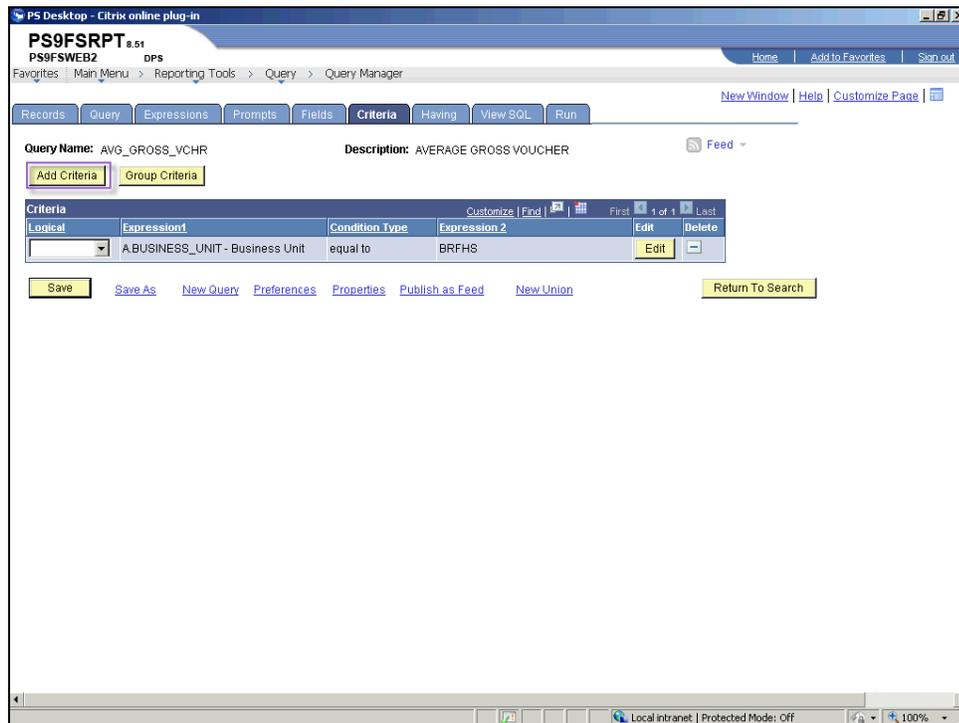
100%

Step	Action
27.	Enter the desired information into the <b>Constant</b> field. Enter " <b>BRFHS</b> ".
28.	Based on the criteria selected in Expression 1, Condition Type and Expression 2, the system will retrieve data for the Business Unit equal to the Constant <b>BRFHS</b> . In other words, only AP voucher data for the Business Unit <b>BRFHS</b> will be retrieved.
29.	Click the <b>OK</b> button. 

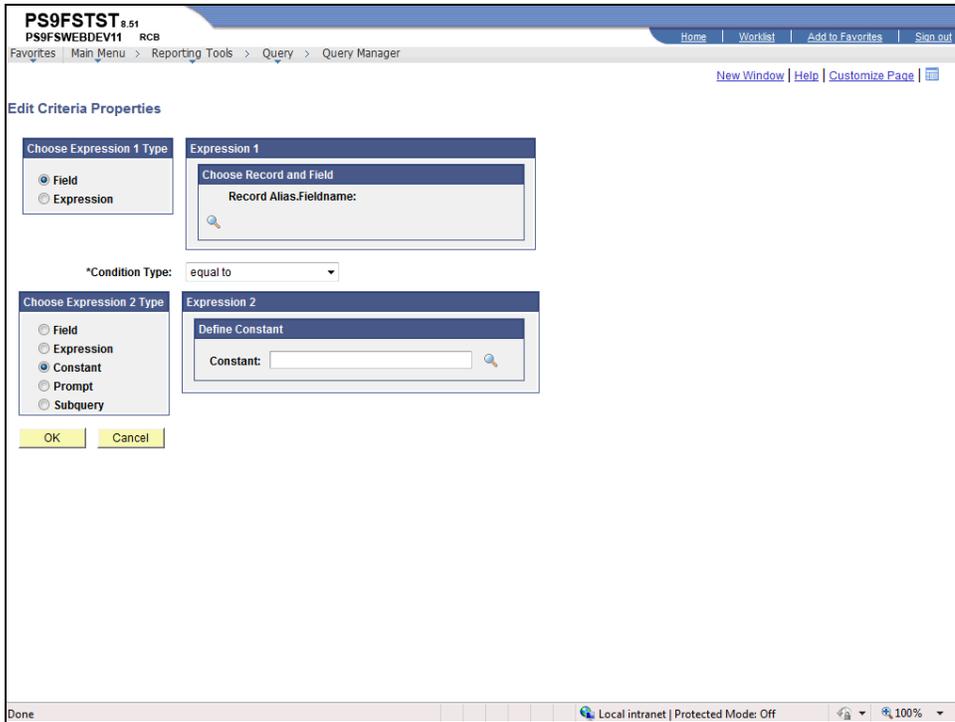


Step	Action
30.	<p><b>Method 1 Summary:</b></p> <ol style="list-style-type: none"> <li>The Business Unit Add Criteria was selected, and</li> <li>A Constant Business Unit value was specified on the Edit Criteria Properties panel.</li> <li>The system will retrieve AP voucher data for <b>BRFHS</b> only.</li> </ol> <p>This completes the discussion of Method 1 - Add criteria from the Fields tab.</p> <p>Click the <b>Save</b> button.</p> 
31.	<p><b>Method 2 - Add criteria from the Criteria tab</b></p> <p>In this example, you will specify a date range for the INVOICE_DT.</p> <p>Click the <b>Criteria</b> tab.</p> 

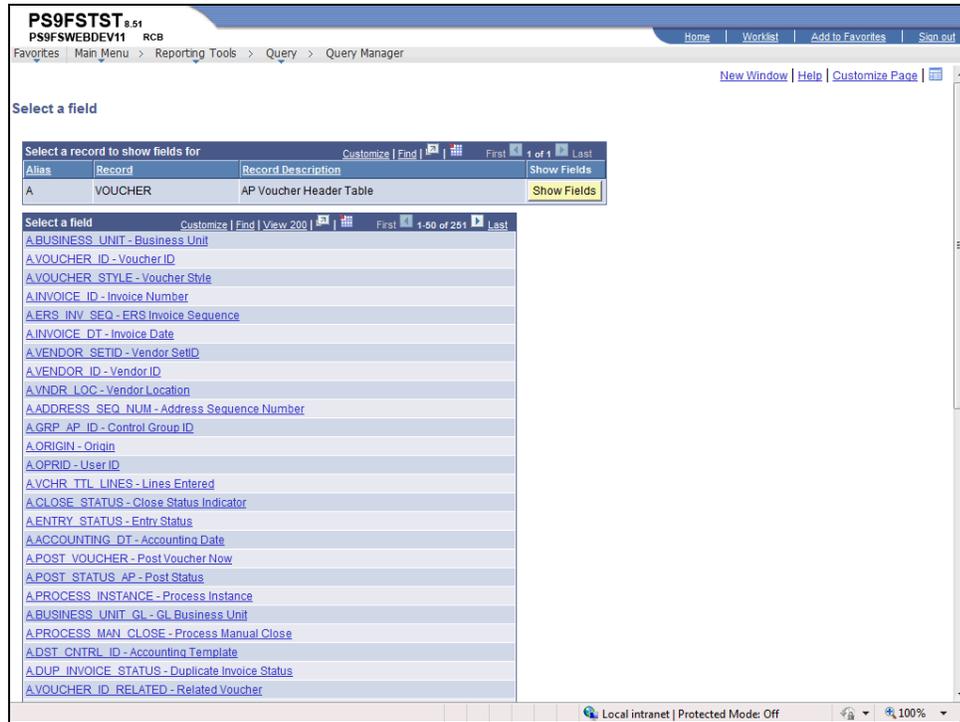
Step	Action
32.	<p>As criteria are added to the query, they are listed on the Criteria tab.</p> <p>The system filters data based on the "Logical" order of added criteria. The Logical represents how criteria compare to each other.</p> <p>If only one criterion is added, the Logical field will either be left blank, or the option <b>"NOT"</b> may be selected. In this example the field is left blank, so data will be retrieved for <b>BRFHS</b> only. If the <b>"NOT"</b> logical was used, the system would retrieve all Business except <b>BRFHS</b>.</p>



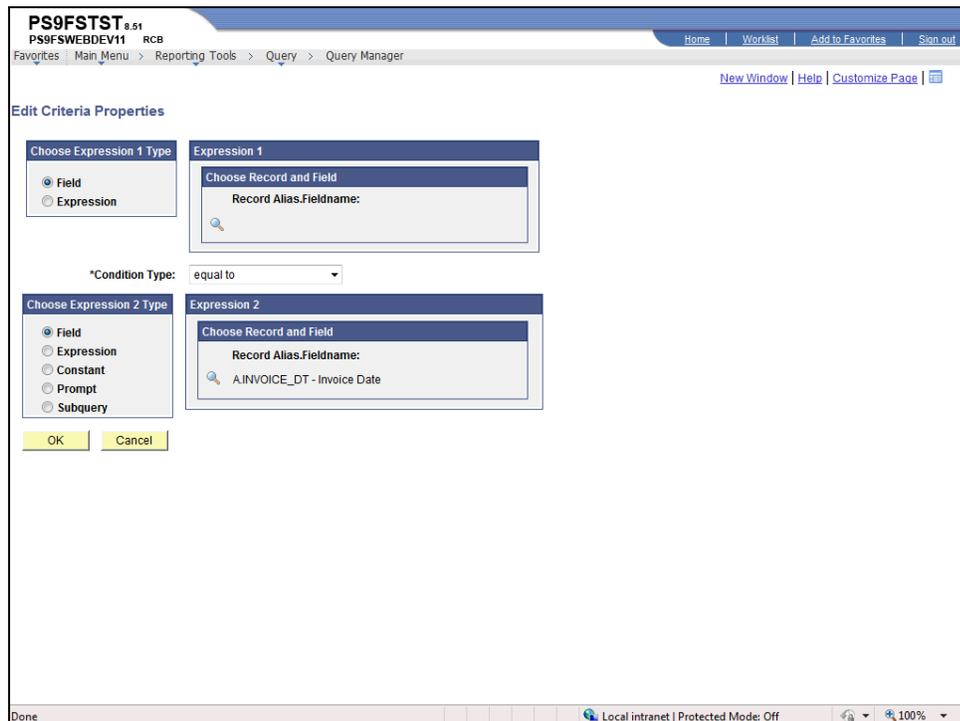
Step	Action
33.	<p>Click the <b>Add Criteria</b> button.</p> 

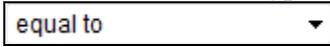


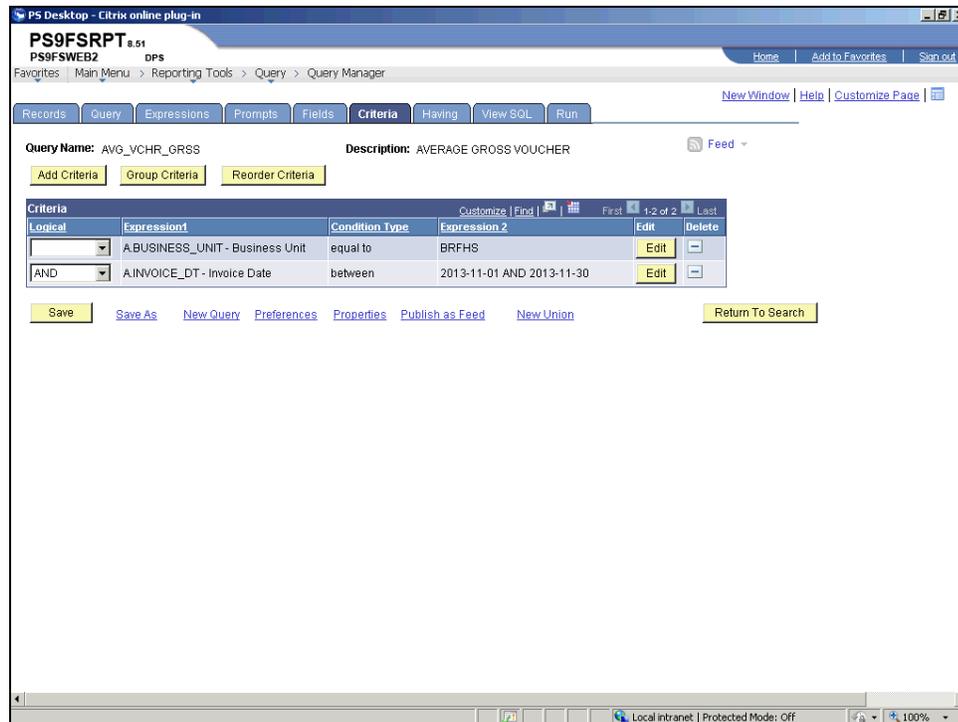
Step	Action
34.	<p>When selecting Add Criteria on the Fields tab, the Field Name defaulted into Expression 1. When adding criteria from the Criteria tab, the Field must be selected using the Select Record or Field (magnifying glass) button. Click the <b>Select Field</b> button.</p> 

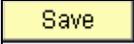


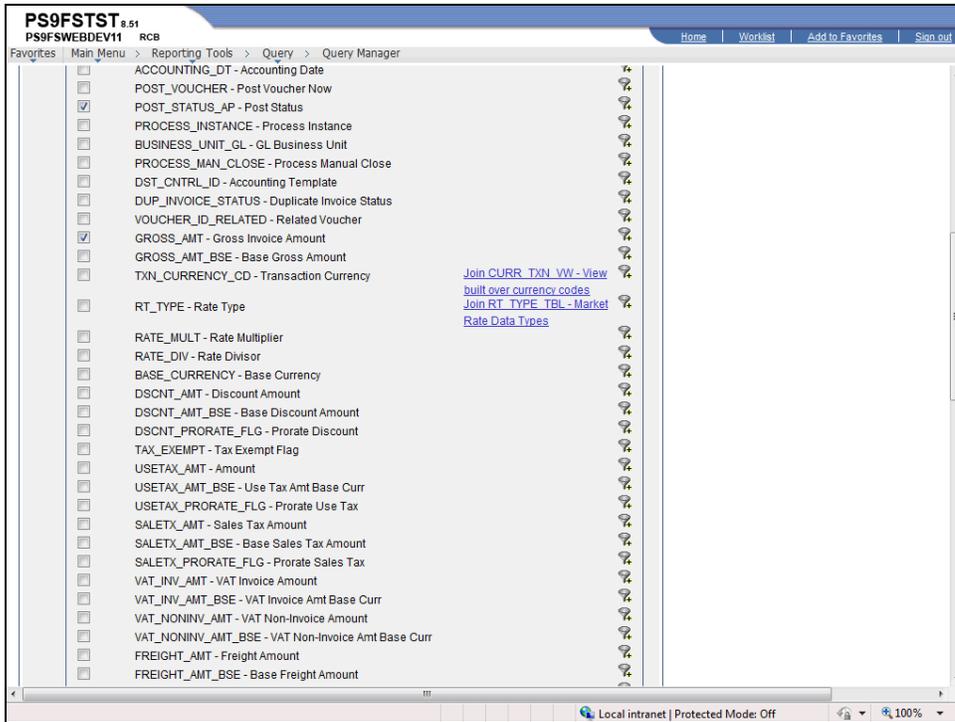
Step	Action
35.	Click the <b>A.INVOICE_DT - Invoice Date</b> link. <span style="border: 1px solid black; padding: 2px;">A.INVOICE_DT - Invoice Date</span>



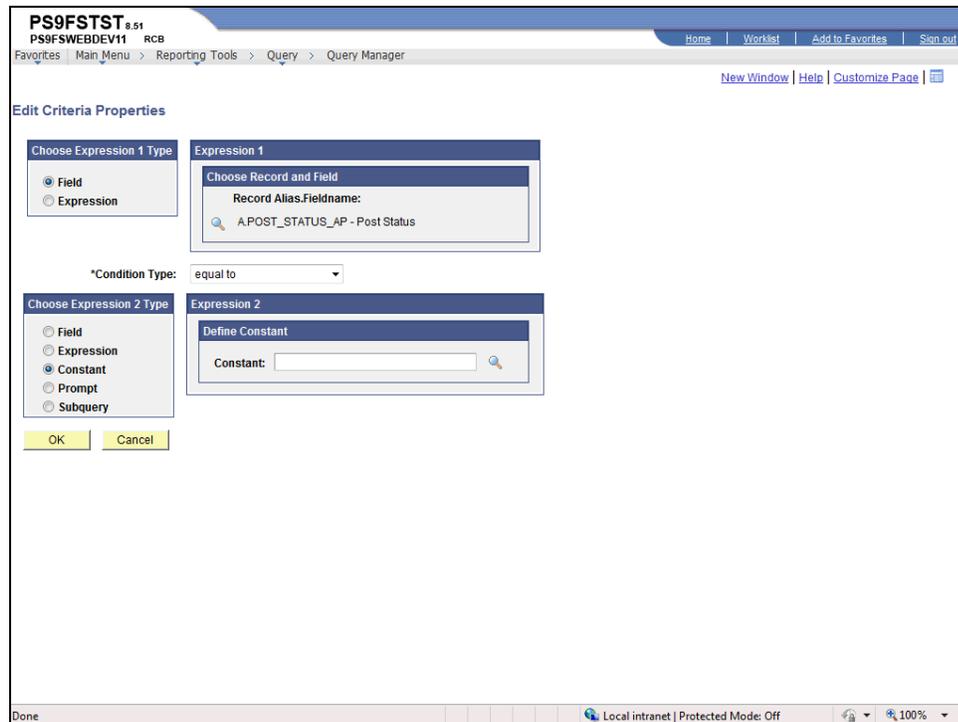
Step	Action
36.	<p>In this example, do not want the INVOICE_DT to equal a specific date. You want the system to retrieve data using a specified range for the INVOICE_DT. Therefore, the Condition Type must be changed.</p> <p>Click the <b>Condition Type</b> list.</p> 
37.	<p>For this example, you want to specify a range of dates, so the between option will be selected.</p> <p>Click the <b>between</b> list item.</p> 
38.	<p>Once the "between" option is selected, the Expression 2 changes from a single Constant field to multiple Constant fields so a date range can be entered.</p> <p>Enter the desired information into the <b>Constant</b> field. Enter "<b>11/01/13</b>".</p>
39.	<p>Enter the desired information into the <b>Constant 2</b> field. Enter "<b>11/30/13</b>".</p>
40.	<p>Based on the criteria selected in Expression 1, Condition Type and Expression 2, the system will retrieve data for vouchers with an INVOICE_DT between 11/01/2013 and 11/30/2013.</p>
41.	<p>Click the <b>OK</b> button.</p> 
42.	<p>An additional row displays on the Criteria tab for INVOICE_DT.</p> <p>The Logical field for INVOICE_DT defaults as <b>AND</b>, requiring the system to only retrieve data meeting <b>both</b> criteria. If the Logical had defaulted to OR, the system would have retrieved only data that met either criteria (i.e. the Business Unit does not equal <b>BRFHS</b>, or the Invoice Date does not fall within the Invoice Date range).</p> <p>Based on the selected criteria, the system will only retrieve vouchers for the <b>BRFHS</b> Business Unit with an Invoice Date between 11/01/2013 and 11/30/2013.</p>



Step	Action
43.	<p><b>Method 2 Summary:</b></p> <ol style="list-style-type: none"> <li>Clicked the Add Criteria button on the Criteria tab;</li> <li>Selected INVOICE_DT as the Field Name for Expression 1;</li> <li>Changed the Condition Type from "equal to" to "between";</li> <li>Entered the Invoice Date range 11/01/2013 through 11/30/2013;</li> <li>The system will retrieve vouchers with an Invoice Date between 11/01/2013 and 11/30/2013.</li> </ol> <p>This completes the discussion of Method 2 - Add criteria from the Criteria tab.</p> <p>Click the <b>Save</b> button.</p> 
44.	<p><b>Method 3</b> - Add criteria from the Query tab</p> <p>In this example, you will specify the POST_STATUS_AP equal "P" for "Posted".</p> <p>Click the <b>Query</b> tab.</p> 



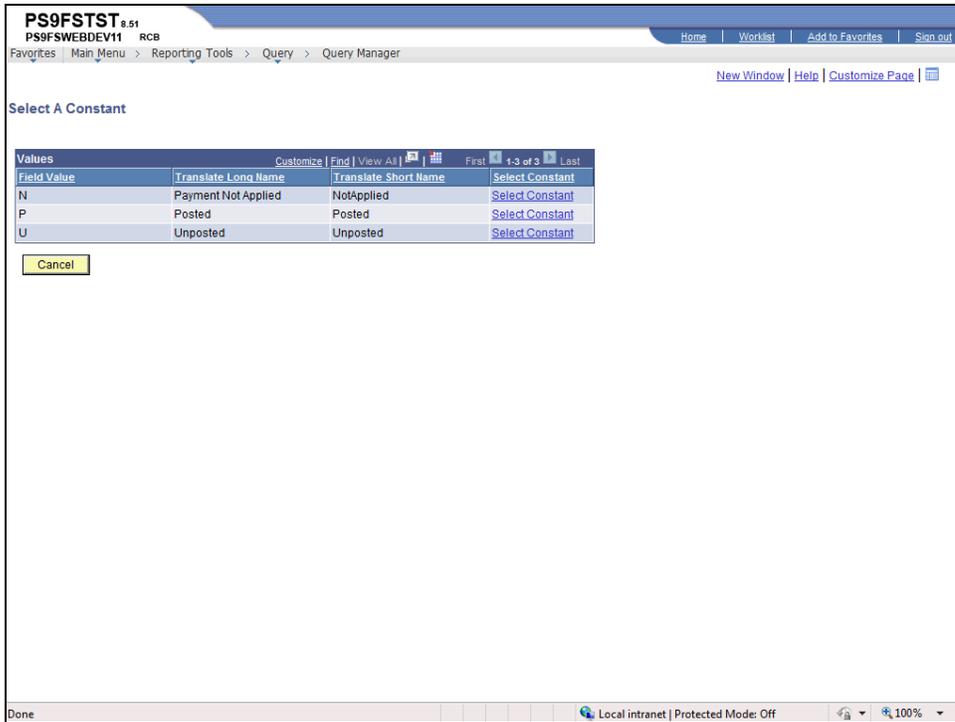
Step	Action
45.	<p>Click the Open Folder button next to A. VOUCHER if the fields are not displayed.</p> <p>Click the <b>Use as Criteria</b> button located to the right of the POST_STATUS_AP field</p> 



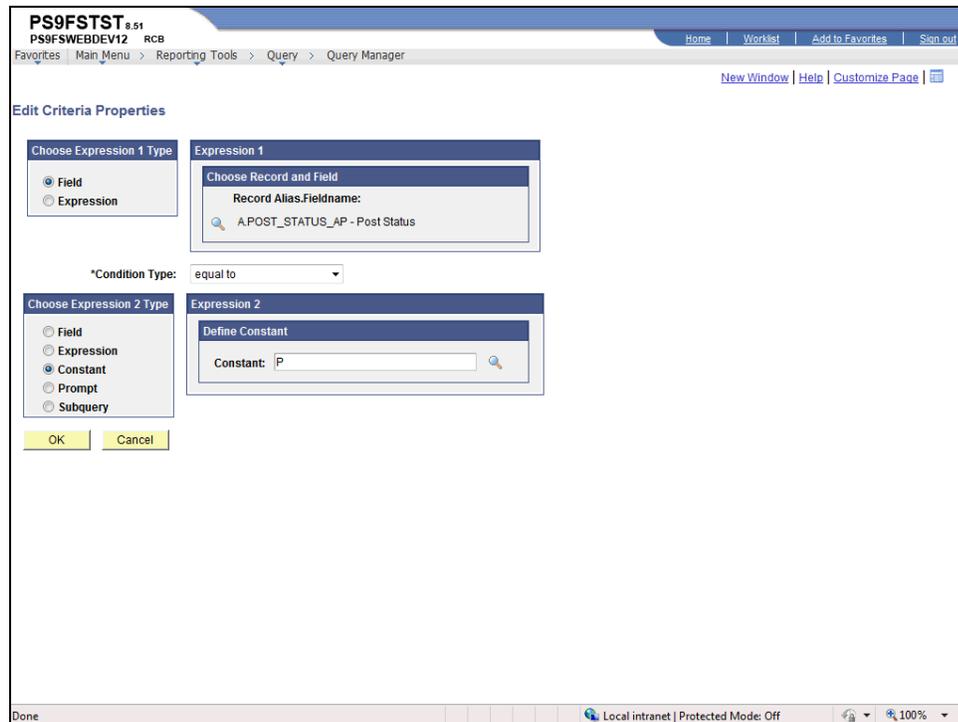
Step	Action
46.	<p>You clicked the Add Criteria (funnel) on the Query tab for a specific field, therefore, the field name defaults into the Expression 1 box. You want the POST_STATUS_AP to equal a specific value, so the Condition Type will remain "equal to". You will identify the POST_STATUS_AP value in Expression 2. POST_STATUS_AP has several predefined value options.</p> <p>Click the <b>Select Constant From List</b> button.</p> 

# Training Guide

## BRF\_Financials\_Query\_9\_1



Step	Action
47.	<p>In this example, you want the POST_STATUS_AP value to be Posted, so the "P" value will be selected.</p> <p>Click the <b>Select Constant</b> link.</p> <p><a href="#">Select Constant</a></p>



PS9FSTST 9.51  
PS9FSWEBDEV12 RCB

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Reporting Tools > Query > Query Manager

New Window | Help | Customize Page |

**Edit Criteria Properties**

Choose Expression 1 Type

Field  
 Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:

A.POST\_STATUS\_AP - Post Status

\*Condition Type: equal to

Choose Expression 2 Type

Field  
 Expression  
 Constant  
 Prompt  
 Subquery

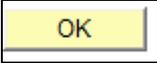
Expression 2

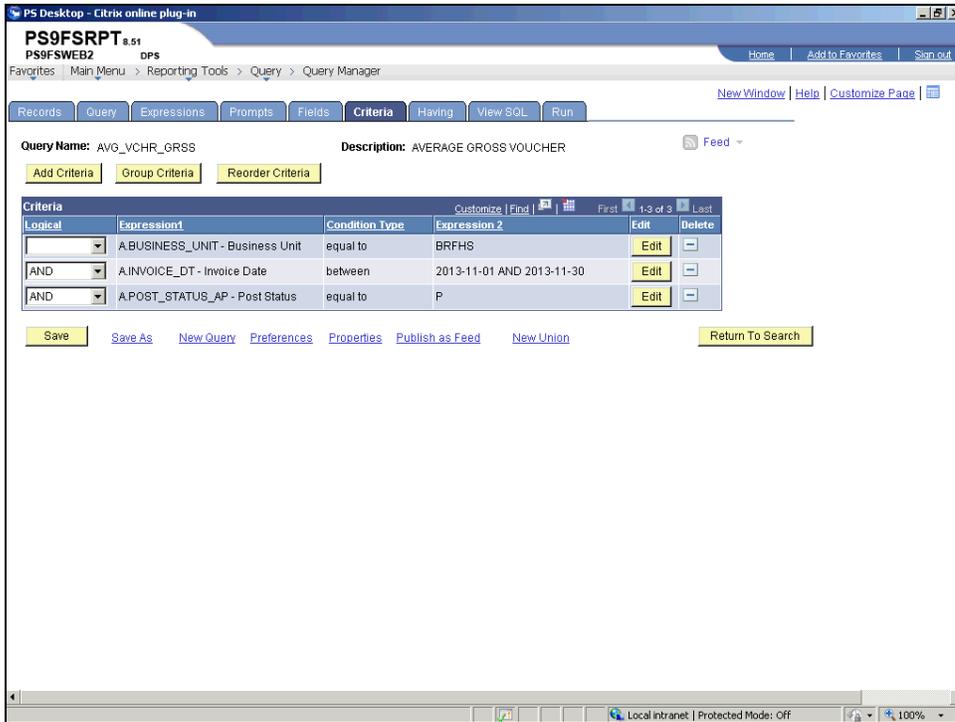
Define Constant

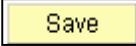
Constant: P

OK Cancel

Done Local intranet | Protected Mode: Off 100%

Step	Action
48.	Click the <b>OK</b> button. 
49.	Click the <b>Criteria</b> link. 
50.	<p>An additional row displays on the Criteria tab for POST_STATUS_AP.</p> <p>The Logical field for POST_STATUS_AP defaults as AND, requiring the system to only retrieve data meeting <b>all</b> three criteria. If the Logical had defaulted to OR, the system would have retrieved only data meeting one of the criteria (i.e. the Business Unit does not equal <b>BRFHS</b> or the Invoice Date does not fall within the specified date range, or the Post Status does not equal Posted).</p> <p>Based on the selected criteria, the system will only retrieve vouchers for the <b>BRFHS</b> Business Unit, with an Invoice Date between <b>11/01/2013</b> and <b>11/30/2013</b>, and having a Post Status of <b>Posted</b>.</p>



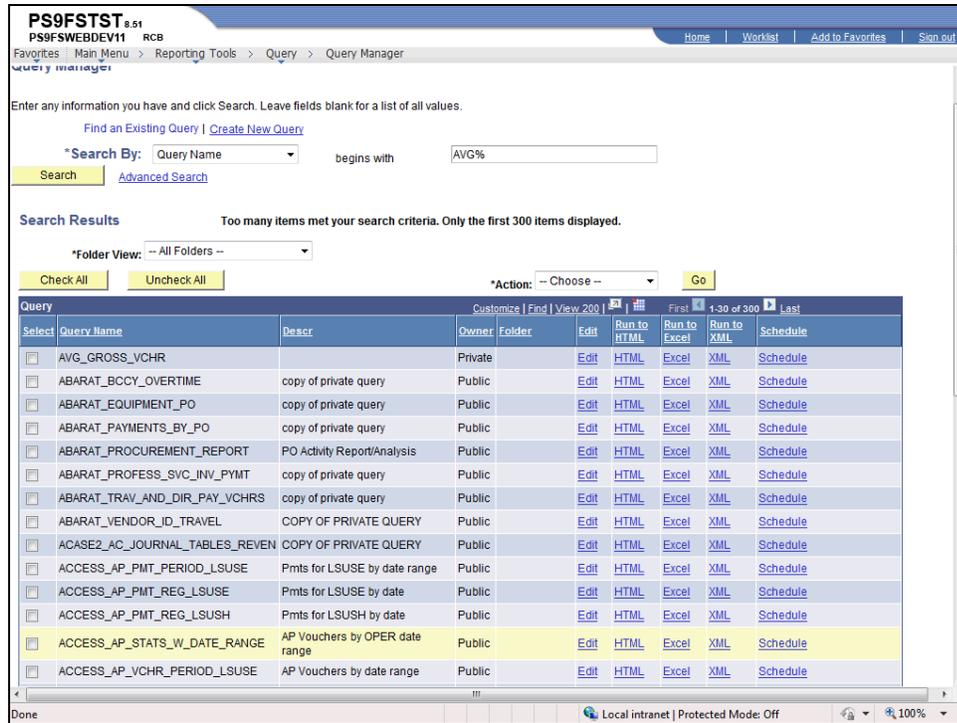
Step	Action
51.	<p><b>Method 3 Summary:</b></p> <ol style="list-style-type: none"> <li>1. Clicked the Query tab;</li> <li>2. Clicked the Add Criteria button on the Query tab for POST_STATUS_AP;</li> <li>3. Selected "P" for Posted for Expression 2;</li> <li>4. The system will retrieve vouchers with a Post Status of Posted.</li> </ol> <p>If desired, you may navigating to the <b>Run Tab</b> to run your query. Click <b>Run</b>.</p> <p>This completes the discussion of Method 3 - Add criteria from the Query tab. Click the <b>Save</b> button.</p> 
52.	<p>This completes <b>Create a Query Using Criteria Components</b>. <b>End of Procedure.</b></p>

## Edit and/or Delete Criteria

### Procedure

In this topic you will learn how to **Edit and/or Delete Criteria**.

Step	Action
1.	<p>You can Edit and/or Delete Criteria from your query by utilizing the Edit link.</p> <p>In this example, you will retrieve all vouchers regardless of whether the voucher has, or has not, been Posted for <b>BRFHS</b> with an <b>INVOICE_DT</b> range of <b>11/01/2013</b> through <b>11/30/2013</b>.</p>



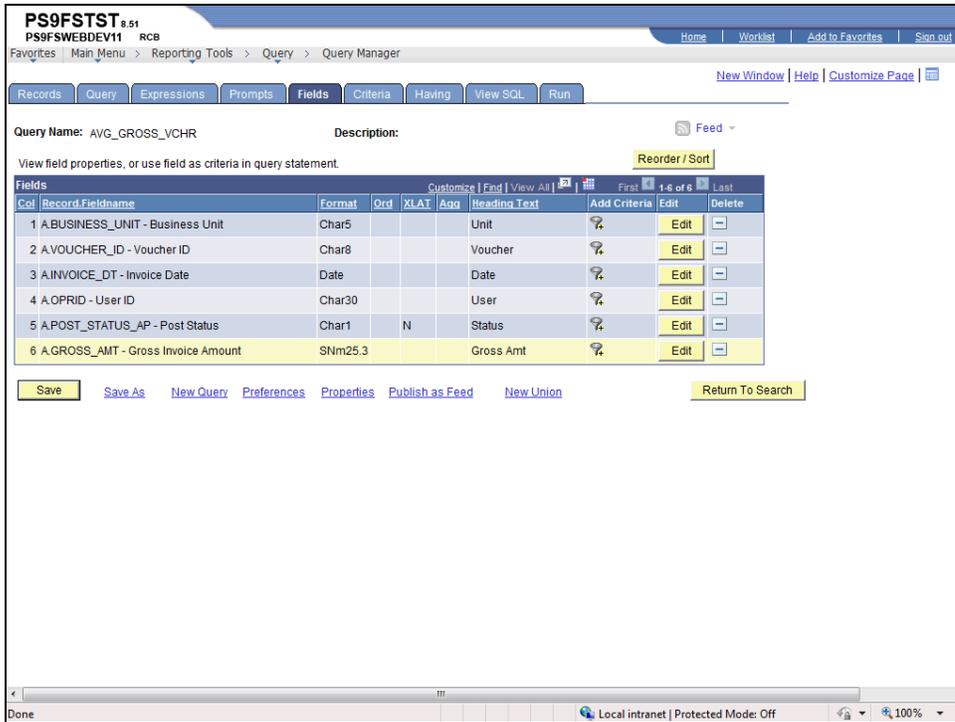
The screenshot shows the 'Query Manager' interface for 'PS9FSTST'. A search for 'AVG%' has been performed, resulting in a list of queries. The 'ACCESS\_AP\_STATS\_W\_DATE\_RANGE' query is highlighted in yellow. The interface includes search filters, a 'Search' button, and a table of results with columns for 'Query Name', 'Descr', 'Owner', 'Folder', and various action links like 'Edit', 'Run to HTML', 'Run to Excel', 'Run to XML', and 'Schedule'.

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input type="checkbox"/>	AVG_GROSS_VCHR		Private		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	ABARAT_BCCY_OVERTIME	copy of private query	Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	ABARAT_EQUIPMENT_PO	copy of private query	Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	ABARAT_PAYMENTS_BY_PO	copy of private query	Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	ABARAT_PROCUREMENT_REPORT	PO Activity Report/Analysis	Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	ABARAT_PROFESS_SVC_INV_PYMT	copy of private query	Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	ABARAT_TRAV_AND_DIR_PAY_VCHRS	copy of private query	Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	ABARAT_VENDOR_ID_TRAVEL	COPY OF PRIVATE QUERY	Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	ACASE2_AC_JOURNAL_TABLES_REVEN	COPY OF PRIVATE QUERY	Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	ACCESS_AP_PMT_PERIOD_LSUSE	Pmts for LSUSE by date range	Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	ACCESS_AP_PMT_REG_LSUSE	Pmts for LSUSE by date	Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	ACCESS_AP_PMT_REG_LSUSH	Pmts for LSUSH by date	Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input checked="" type="checkbox"/>	ACCESS_AP_STATS_W_DATE_RANGE	AP Vouchers by OPER date range	Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>
<input type="checkbox"/>	ACCESS_AP_VCHR_PERIOD_LSUSE	AP Vouchers by date range	Public		<a href="#">Edit</a>	<a href="#">HTML</a>	<a href="#">Excel</a>	<a href="#">XML</a>	<a href="#">Schedule</a>

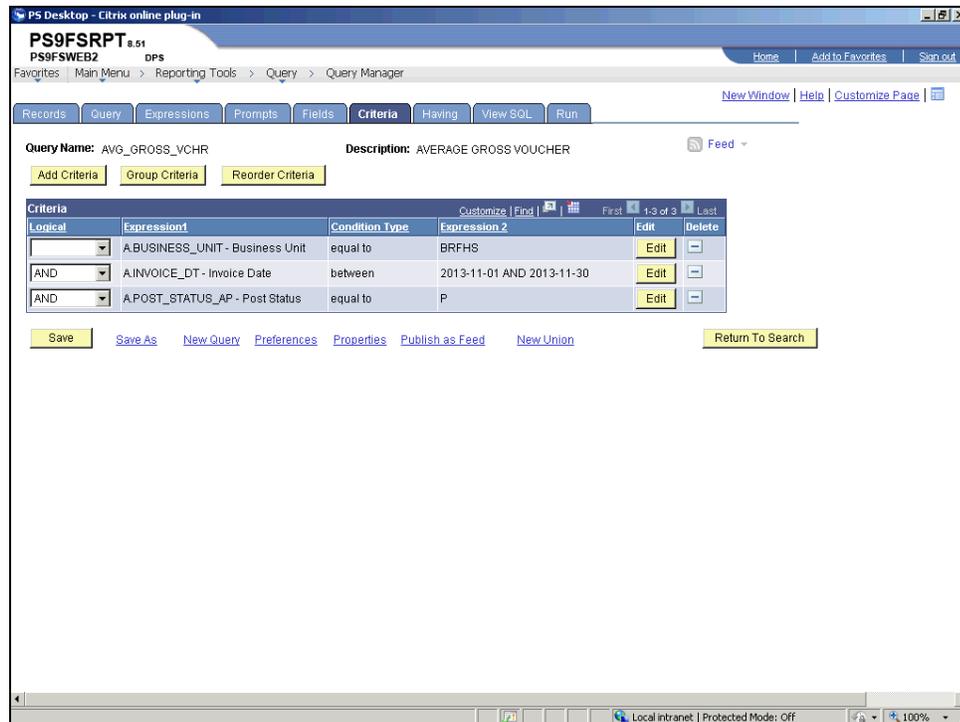
Step	Action
2.	<p>Click the <b>Edit</b> link.</p> <p><a href="#">Edit</a></p>

# Training Guide

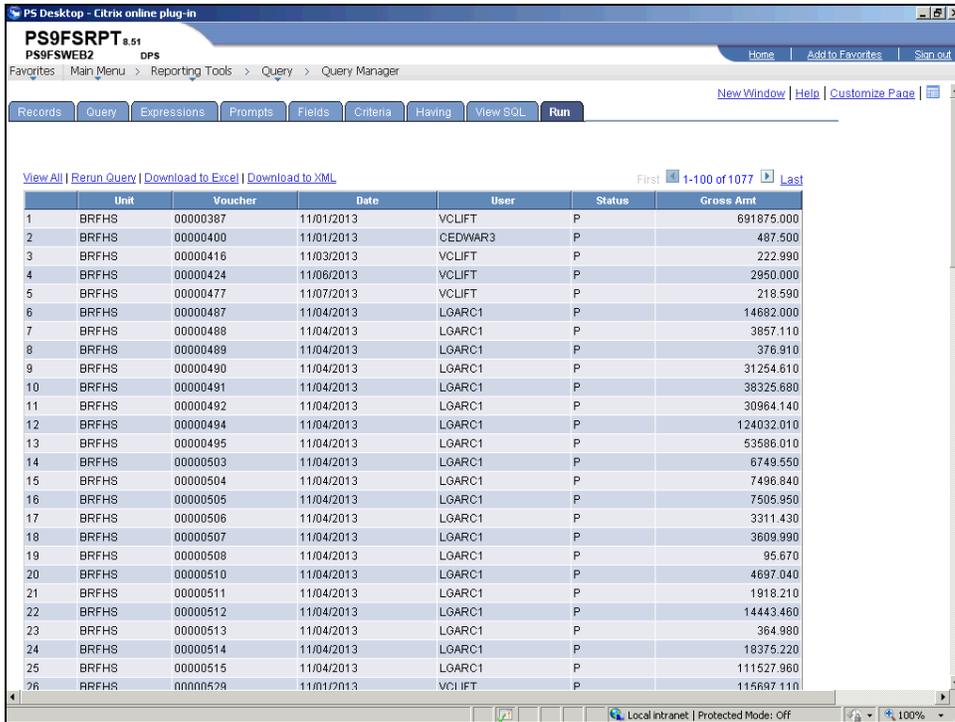
## BRF\_Financials\_Query\_9\_1



Step	Action
3.	<p>In this example you want to retrieve all vouchers, not just those with a Post Status of Posted. You will, therefore, delete the criteria for the POST_STATUS_AP field.</p> <p>Click the <b>Criteria</b> tab.</p> 

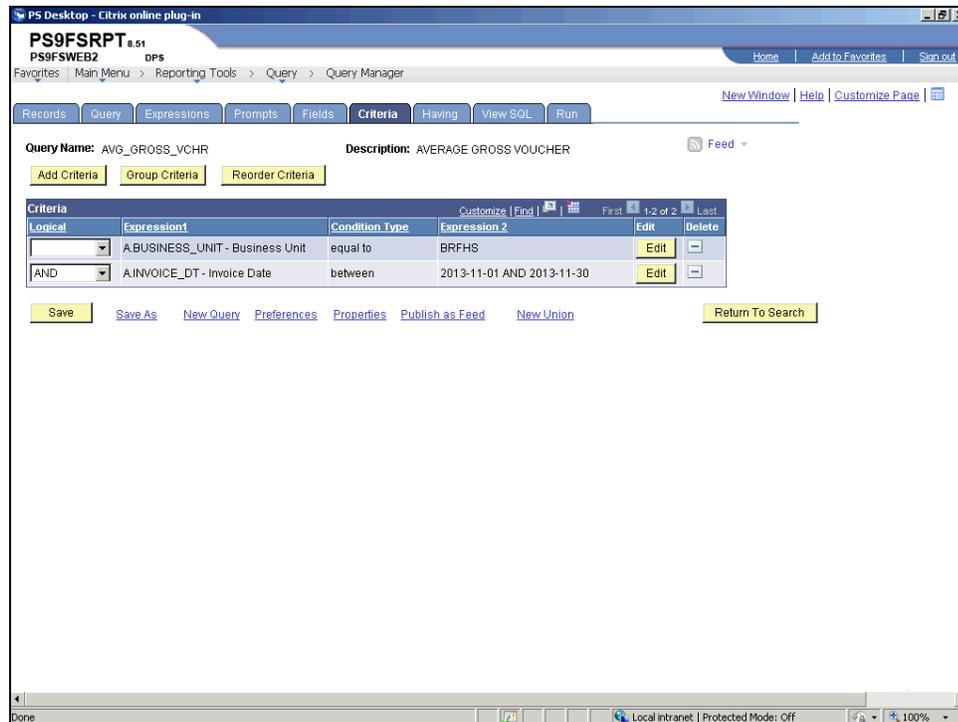


Step	Action
4.	Click the <b>Delete</b> (-) button for the POST_STATUS_AP criteria. 
5.	Click the <b>Save</b> button. 
6.	Click the <b>Run</b> link to preview the query. 

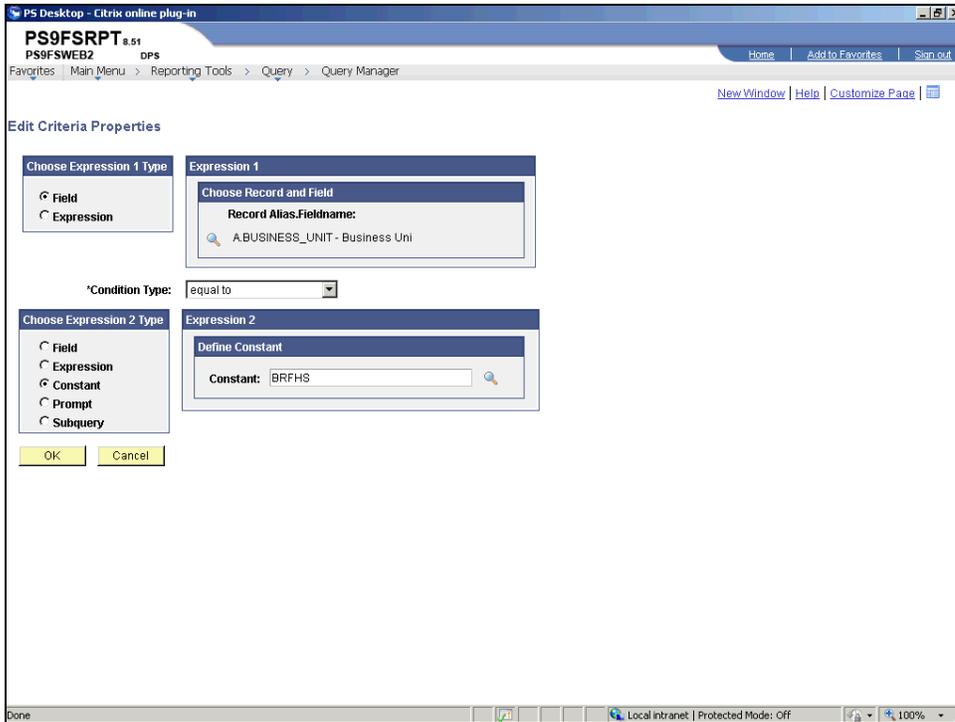


	Unit	Voucher	Date	User	Status	Gross Amt
1	BRFHS	00000387	11/01/2013	VCLIFT	P	691875.000
2	BRFHS	00000400	11/01/2013	CEWVAR3	P	487.500
3	BRFHS	00000416	11/03/2013	VCLIFT	P	222.990
4	BRFHS	00000424	11/06/2013	VCLIFT	P	2950.000
5	BRFHS	00000477	11/07/2013	VCLIFT	P	218.590
6	BRFHS	00000487	11/04/2013	LGARC1	P	14682.000
7	BRFHS	00000488	11/04/2013	LGARC1	P	3857.110
8	BRFHS	00000489	11/04/2013	LGARC1	P	376.910
9	BRFHS	00000490	11/04/2013	LGARC1	P	31254.610
10	BRFHS	00000491	11/04/2013	LGARC1	P	38325.680
11	BRFHS	00000492	11/04/2013	LGARC1	P	30964.140
12	BRFHS	00000494	11/04/2013	LGARC1	P	124032.010
13	BRFHS	00000495	11/04/2013	LGARC1	P	53586.010
14	BRFHS	00000503	11/04/2013	LGARC1	P	6749.550
15	BRFHS	00000504	11/04/2013	LGARC1	P	7496.840
16	BRFHS	00000505	11/04/2013	LGARC1	P	7505.950
17	BRFHS	00000506	11/04/2013	LGARC1	P	3311.430
18	BRFHS	00000507	11/04/2013	LGARC1	P	3609.990
19	BRFHS	00000508	11/04/2013	LGARC1	P	95.670
20	BRFHS	00000510	11/04/2013	LGARC1	P	4697.040
21	BRFHS	00000511	11/04/2013	LGARC1	P	1918.210
22	BRFHS	00000512	11/04/2013	LGARC1	P	14443.460
23	BRFHS	00000513	11/04/2013	LGARC1	P	364.980
24	BRFHS	00000514	11/04/2013	LGARC1	P	18375.220
25	BRFHS	00000515	11/04/2013	LGARC1	P	111527.960
26	BRFHS	00000524	11/01/2013	VCLIFT	P	115697.110

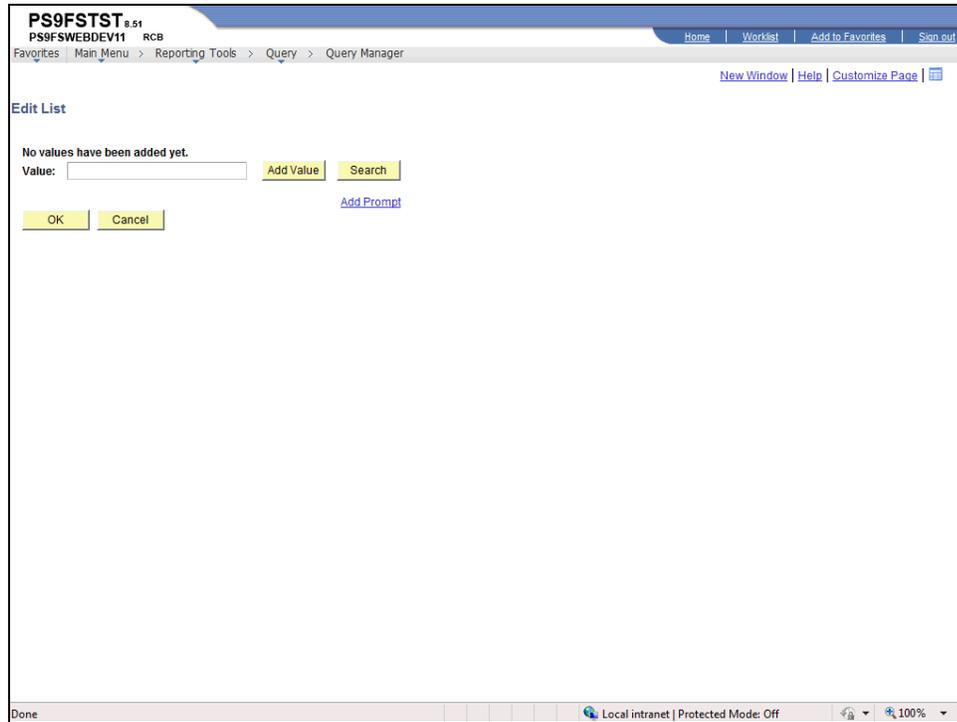
Step	Action
7.	<p>The first 100 options include only Posted vouchers.</p> <p>Click the <b>Last</b> link to view additional results.</p> <p><a href="#">Last</a></p>
8.	<p>The last 100 options includes Posted vouchers, but also included vouchers that are Unposted as well. The Unposted vouchers have a Status of "U".</p> <p>Click the <b>Criteria</b> tab.</p> <p><a href="#">Criteria</a></p>



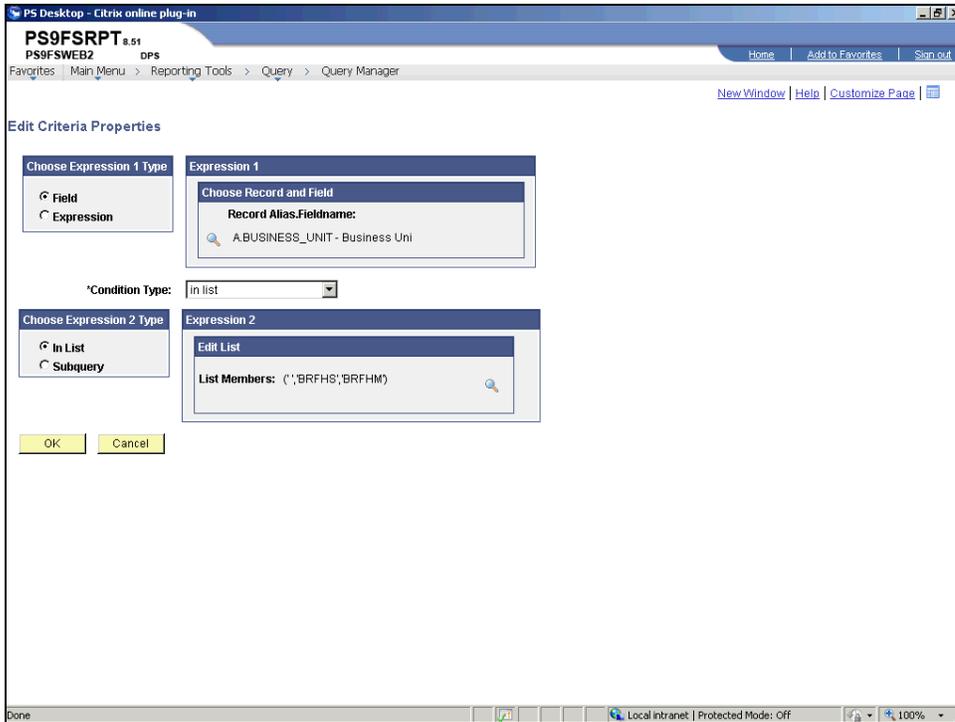
Step	Action
9.	<p>Criteria can be Edited as well as Deleted. In this example, you will Edit the Business Unit criteria to include BRFHS and BRFHM.</p> <p>Click the <b>Edit</b> button.</p> <p></p>

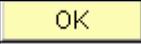


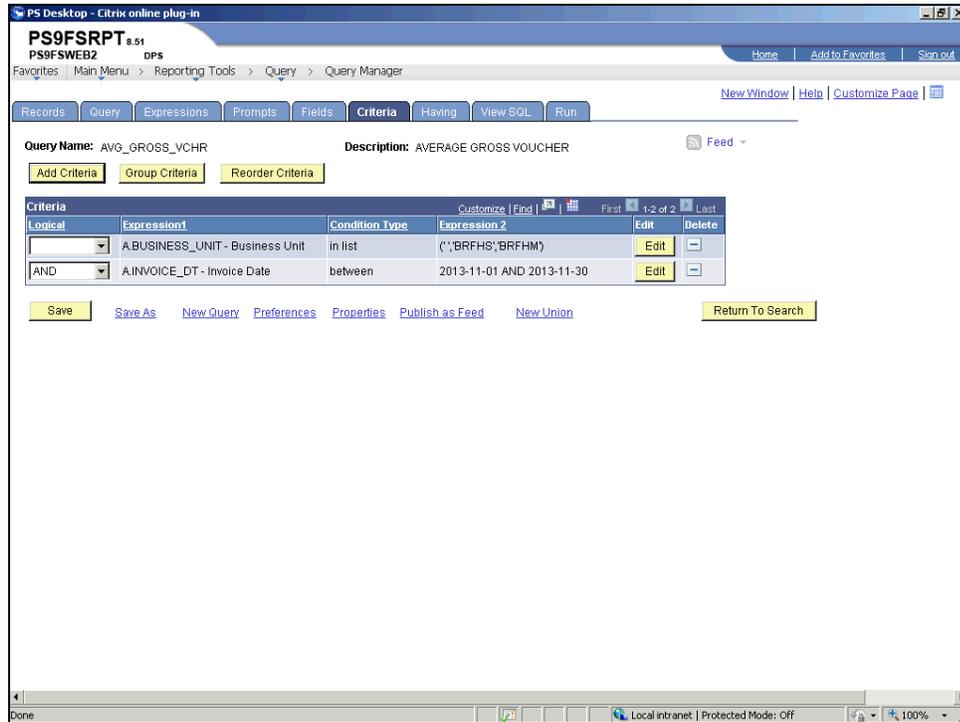
Step	Action
10.	<p>The Condition Type must be changed so the system will retrieve vouchers for BRFHS and BRFHM.</p> <p>Click the <b>Condition Type</b> list.</p> 
11.	<p>The "in list" option allows you to specify multiple values for a field, in this case the Business Unit field, rather than a single value. The system will match the comparison values in the list when compiling results.</p> <p>Click the <b>in list</b> option.</p> 
12.	<p>Expression 2 is no longer a Constant value and will identify the comparison values the system will match when compiling results.</p> <p>Click the <b>Select List Members</b> button.</p> 



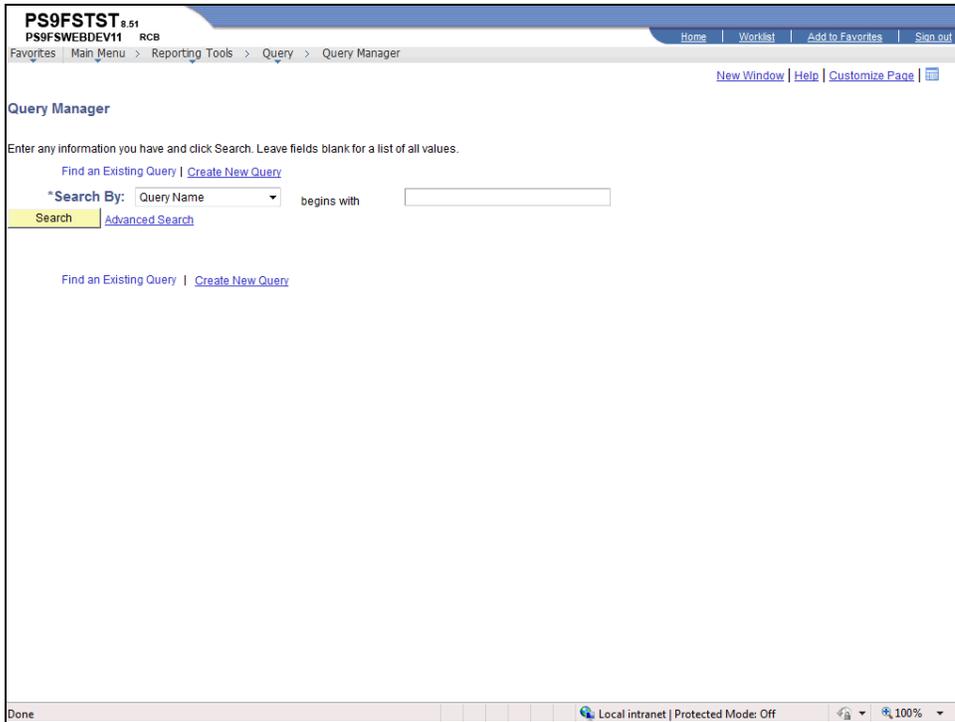
Step	Action
13.	<p>On the Edit List page, you will add the values to be included in your list. In this example, you are creating a list of Business Units. You <b>must</b> enter the Business Unit identifier into the Value field in ALL CAPS.</p> <p>Click in the <b>Value</b> field.</p> <input data-bbox="440 1199 824 1241" type="text"/>
14.	<p>Click the <b>Add Value</b> button to add the BRFHS Business Unit to your list.</p> <input data-bbox="440 1287 578 1335" type="button" value="Add Value"/>
15.	<p>You will repeat steps 14 and 15 until all Business Units have been added to your list.</p> <p>Enter the desired information into the <b>Value</b> field. Enter "<b>BRFHS</b>".</p>
16.	<p>Click the <b>Add Value</b> button.</p> <input data-bbox="440 1497 578 1545" type="button" value="Add Value"/>
17.	<p>Enter the desired information into the <b>Value</b> field. Enter "<b>BRFHM</b>".</p>
18.	<p>Click the <b>Add Value</b> button.</p> <input data-bbox="440 1640 578 1688" type="button" value="Add Value"/>
19.	<p>Click the <b>OK</b> button.</p> <input data-bbox="440 1734 578 1782" type="button" value="OK"/>

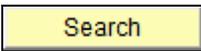


Step	Action
20.	<p>Expression 2 now contains a list of Business Units values: <b>BRFHS</b> and <b>BRFHM</b>. The system will retrieve vouchers associated with each of these Business Units.</p> <p>Click the <b>OK</b> button.</p> 



Step	Action
21.	Click the <b>Save</b> button. 
22.	Click the <b>Return To Search</b> button. 



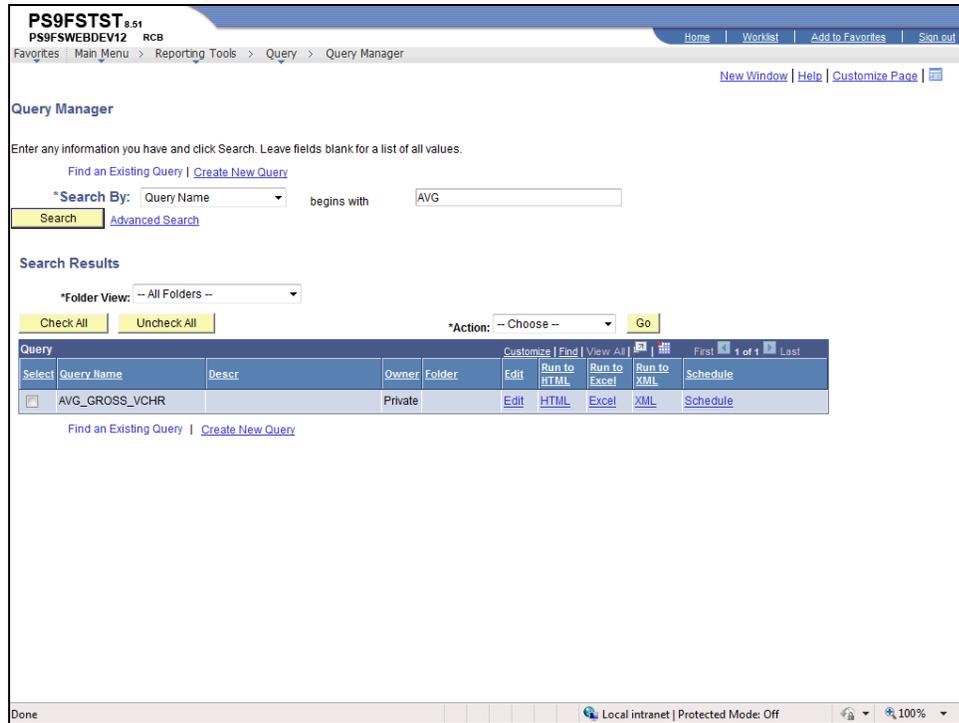
Step	Action
23.	Enter the desired information into the <b>Search By</b> field. Enter " <b>AVG%</b> ".
24.	Click the <b>Search</b> button. 
25.	Click the <b>HTML</b> link. This will open a new window. 
26.	Your results include vouchers for BRFHS and BRFHM with Invoice Dates between 11/01/2013 through 11/30/2013.
27.	This completes <b>Edit and/or Delete Criteria</b> . <b>End of Procedure.</b>

## Create a Run Time Prompt

### Procedure

In this topic you will learn how to **Create a Run Time Prompt**.

Step	Action
1.	<p>Run Time Prompts allow you to further refine your query results. When running your query, the system will "prompt" you to enter a value prior to retrieving results.</p> <p>In this example, you wish to view results for each Business Unit separately and determine the order in which you view them.</p>



The screenshot shows the 'Query Manager' interface. At the top, it displays 'PS9FSTST 8.51' and 'PS9FSWEBDEV12 RCB'. The breadcrumb navigation is 'Main Menu > Reporting Tools > Query > Query Manager'. There are links for 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below the navigation, there are links for 'New Window', 'Help', and 'Customize Page'. The main section is titled 'Query Manager' and contains a search area with a dropdown for '\*Search By:' set to 'Query Name' and a text input for 'begins with' containing 'AVG'. There are 'Search' and 'Advanced Search' buttons. Below the search area is a 'Search Results' section with a '\*Folder View:' dropdown set to '-- All Folders --', 'Check All' and 'Uncheck All' buttons, and an '\*Action:' dropdown set to '-- Choose --' with a 'Go' button. A table of search results is displayed with columns: 'Select', 'Query Name', 'Descr', 'Owner', 'Folder', 'Edit', 'Run to HTML', 'Run to Excel', 'Run to XML', and 'Schedule'. The table contains one row for 'AVG\_GROSS\_VCHR' with 'Private' as the folder and 'Edit' as the owner. The 'Edit' cell contains links for 'Edit', 'HTML', 'Excel', 'XML', and 'Schedule'. At the bottom of the interface, there is a status bar with 'Done', 'Local intranet | Protected Mode: Off', and a zoom level of '100%'.

Step	Action
2.	<p>Click the <b>Edit</b> link.</p> <p><a href="#">Edit</a></p>

# Training Guide

## BRF\_Financials\_Query\_9\_1

PS9FSTST 9.51  
PS9FSWEBDEV12 RCB

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Reporting Tools > Query > Query Manager

Records | Query | Expressions | Prompts | **Fields** | Criteria | Having | View SQL | Run

Query Name: AVG\_GROSS\_VCHR      Description:      Feed

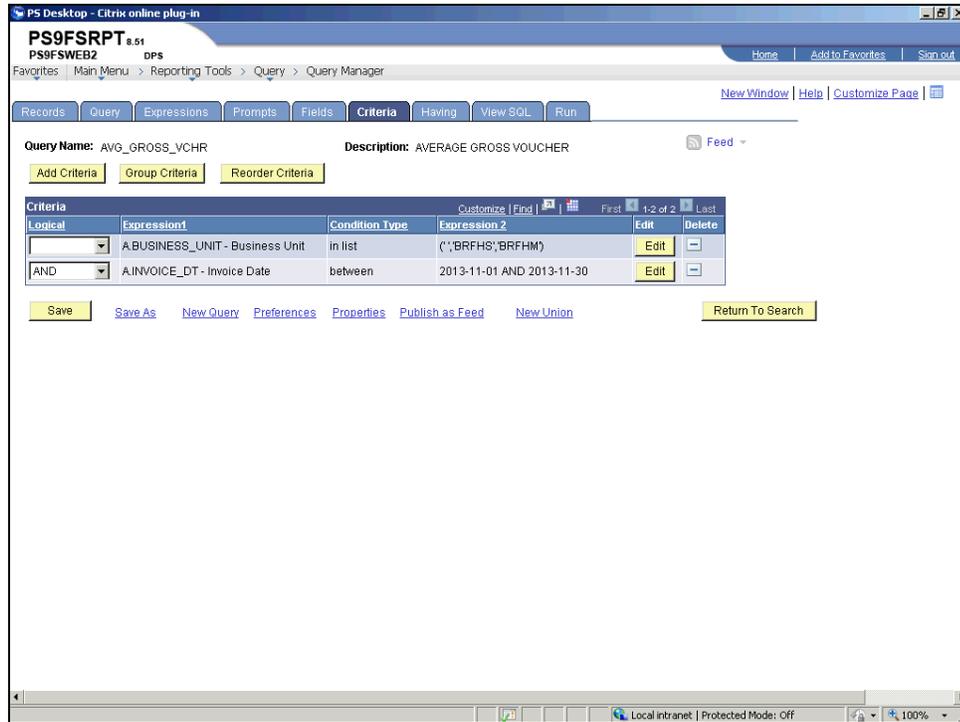
View field properties, or use field as criteria in query statement.      Reorder/Sort

Col	Record.Fieldname	Format	Ord	XLAT	Avg	Heading Text	Add Criteria	Edit	Delete
1	A.BUSINESS_UNIT - Business Unit	Char5				Unit		Edit	
2	A.VOUCHER_ID - Voucher ID	Char8				Voucher		Edit	
3	A.INVOICE_DT - Invoice Date	Date				Date		Edit	
4	A.OPRID - User ID	Char30				User		Edit	
5	A.POST_STATUS_AP - Post Status	Char1		N		Status		Edit	
6	A.GROSS_AMT - Gross Invoice Amount	SNm25.3				Gross Amt		Edit	

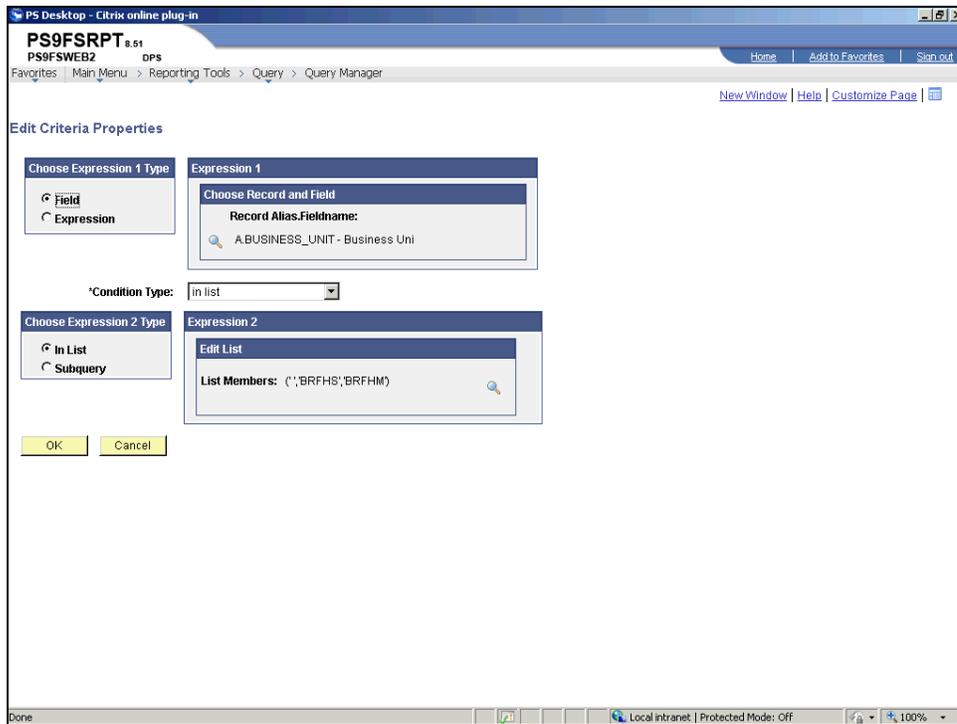
Save   Save As   New Query   Preferences   Properties   Publish as Feed   New Union      Return To Search

Done      Local intranet | Protected Mode: Off      100%

Step	Action
3.	Click the <b>Criteria</b> tab. 

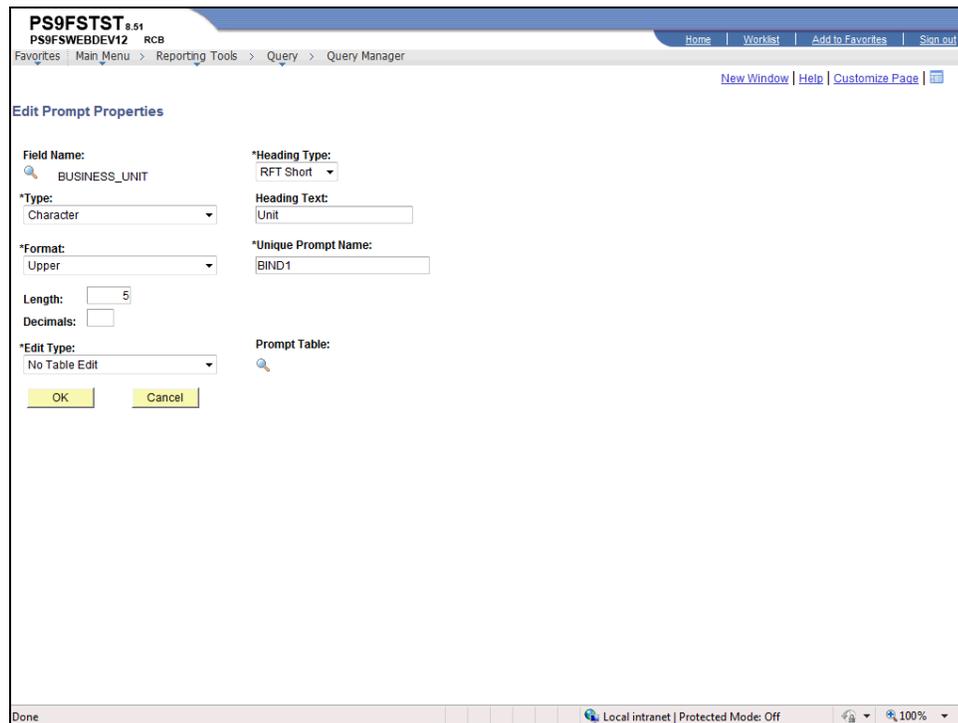


Step	Action
4.	Click the <b>Edit</b> button for the Business Unit criteria. 



Step	Action
5.	<p>The Condition Type will change to "equal to", so that you can specify, using a prompt, which Business Unit you wish to view. In this example, using a prompt is more efficient than creating a list that includes all Business Units.</p> <p>Click the <b>Condition Type</b> list.</p> 
6.	<p>Click the <b>equal to</b> option.</p> 
7.	<p>On the "equal to" option is selected for the Condition Type, the Expression 2 Type box displays a new list of options. The Expression 2 changes to Define Constant.</p> <p>Click the <b>Prompt</b> option.</p> 
8.	<p>When Prompt is selected for Expression 2 Type, the Expression 2 box changes from Define Constant to Define Prompt. Two (2) links have been added as well to the Expression 2 link: New Prompt and Edit Prompt. Currently, there are no Prompts identified, so the Edit Prompt option would not be selected at this time.</p> <p>Click the <b>New Prompt</b> link.</p> 

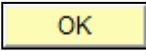
Step	Action
9.	<p><b>Edit Prompt Properties</b></p> <p>The Edit Prompt Properties is where you define prompt properties and is comprised of the following fields:</p> <p><b>Field Name:</b> The name of the field for which you are creating the prompt;  <b>Type:</b> Indicates the type of field (i.e. character, date, datetime, number, etc.);  <b>Format:</b> Specifies the format (i.e. Upper Case, Social Security Number, Mixed Case, Zip Code, etc.) of the field;  <b>Length:</b> The number of available characters;  <b>Decimals:</b> The number, if any, of Decimal places allowed;  <b>Edit Type:</b> Allows you to evaluate a value against a set of tables to determine if the value is valid;</p>
10.	<p><b>Edit Prompt Properties (continued)</b></p> <p><b>Heading Type:</b> Defines whether the prompt heading is Text, RFT Short, or RFT Long;  <b>Heading Text:</b> Displays the label for the prompt box;  <b>Unique Prompt Name:</b> A default value generated by the Query Manager; and  <b>Prompt Table:</b> This field is not used when creating simple queries.</p>

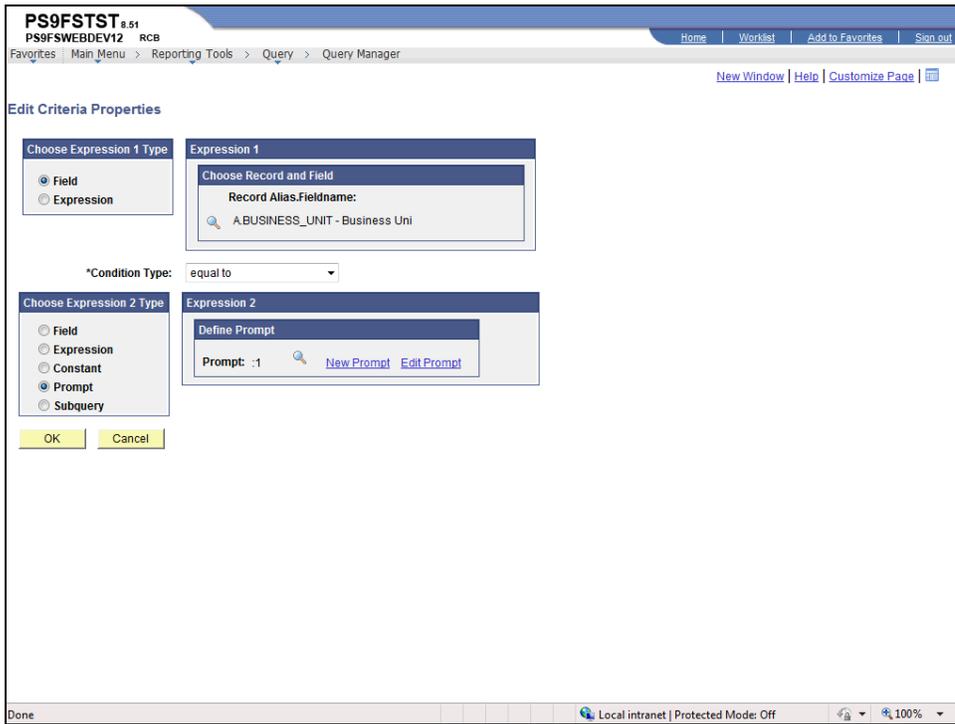


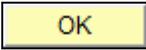
The screenshot displays the 'Edit Prompt Properties' window in a web browser. The browser's address bar shows 'PS9FSTST 8.51 PS9FSWEBDEV12 RCB' and navigation links for Home, Worklist, Add to Favorites, and Sign out. The breadcrumb trail is 'Favorites > Main Menu > Reporting Tools > Query > Query Manager'. The page title is 'Edit Prompt Properties'. The form contains the following fields and values:

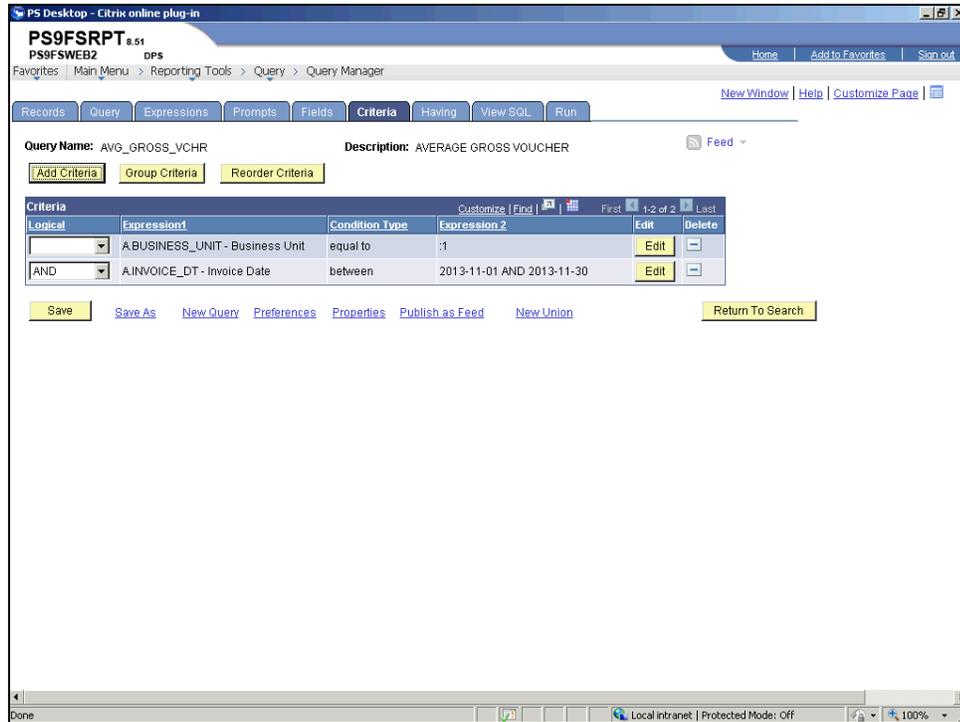
- Field Name: BUSINESS\_UNIT
- \*Type: Character
- \*Format: Upper
- Length: 5
- Decimals: (empty)
- \*Edit Type: No Table Edit
- \*Heading Type: RFT Short
- Heading Text: Unit
- \*Unique Prompt Name: BIND1
- Prompt Table: (empty)

At the bottom of the form are 'OK' and 'Cancel' buttons. The browser's status bar at the bottom indicates 'Done', 'Local intranet | Protected Mode: Off', and a zoom level of 100%.

Step	Action
11.	For this example, the Edit Prompt Properties page will remain as defaulted.  Click the <b>OK</b> button. 
12.	The Prompt created displays in the Expression 2 box. Prompts are displayed in the Criteria format ":number" (i.e. :1). Additional prompts may be created and would be displayed as :2, :3, etc.



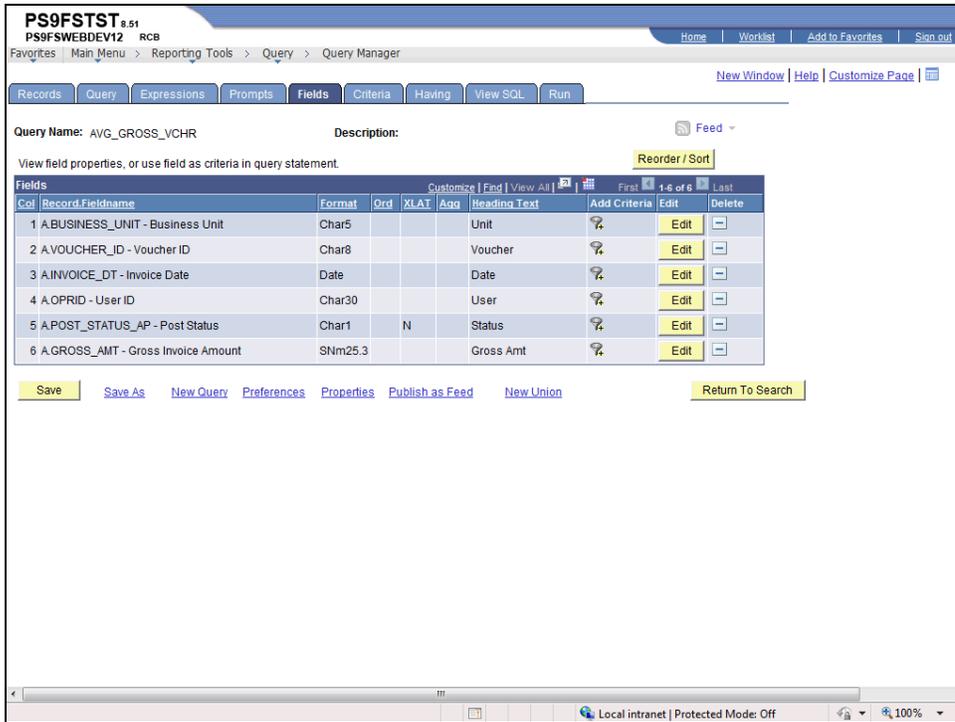
Step	Action
13.	Click the <b>OK</b> button. 



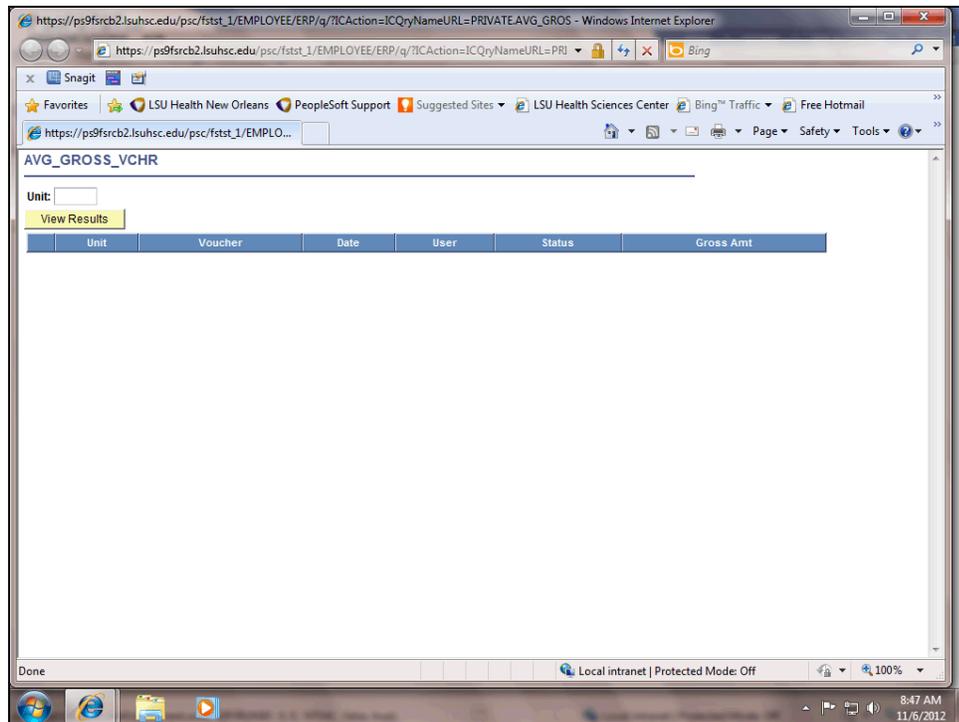
Step	Action
14.	Click the <b>Save</b> button to save the changes to your query. 

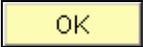
# Training Guide

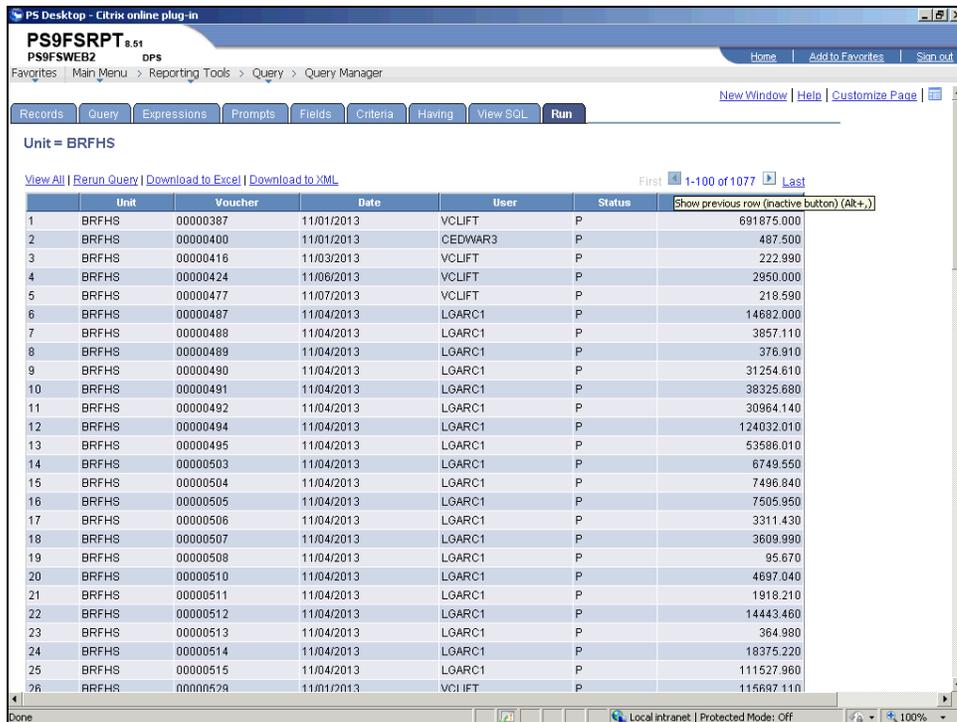
## BRF\_Financials\_Query\_9\_1



Step	Action
15.	<p>You will now run the query to test the criteria changes.</p> <p>Click the <b>Run</b> tab.</p> 



Step	Action
16.	<p>Your Prompt displays. You will enter the Business Unit identifier into the Unit field. The system will retrieve only vouchers for the Unit specified.</p> <p>Enter the desired information into the <b>Unit</b> field. Enter "<b>BRFHS</b>".</p>
17.	<p>Click the <b>OK</b> button.</p> 



Step	Action
18.	The <b>BRFHS</b> query results display.  Click the <b>Close</b> button. 
19.	This completes <b>Create a Run Time Prompt</b> . <b>End of Procedure.</b>

## Exercise 5

Query Manager enables you to create queries that include multiple-table joins. Joins retrieve data from more than one record (table), presenting the data as if it came from one record. PeopleSoft Query links the records, based on common columns, and links the rows to the two records by common values in the shared columns.

Joined records must each include at least one field in both records that contain comparable data. For example, if you want to join a Vendor record and a Voucher record, they both must contain a common element, such as a Vendor ID field, to serve as a field on which the data can be matched. Records can be joined on multiple fields so long as the fields have the potential to supply matching information. Typically, but not always, records are joined on key fields. Key fields are essentially the field(s) that make the record unique, and are shown in Query with a **KEY** symbol next to them.

Using joins, you define relationships among fields when you query the records. The procedure for joining records differs depending on how the records being joined are related to each other. Query Manager uses three types of Joins:

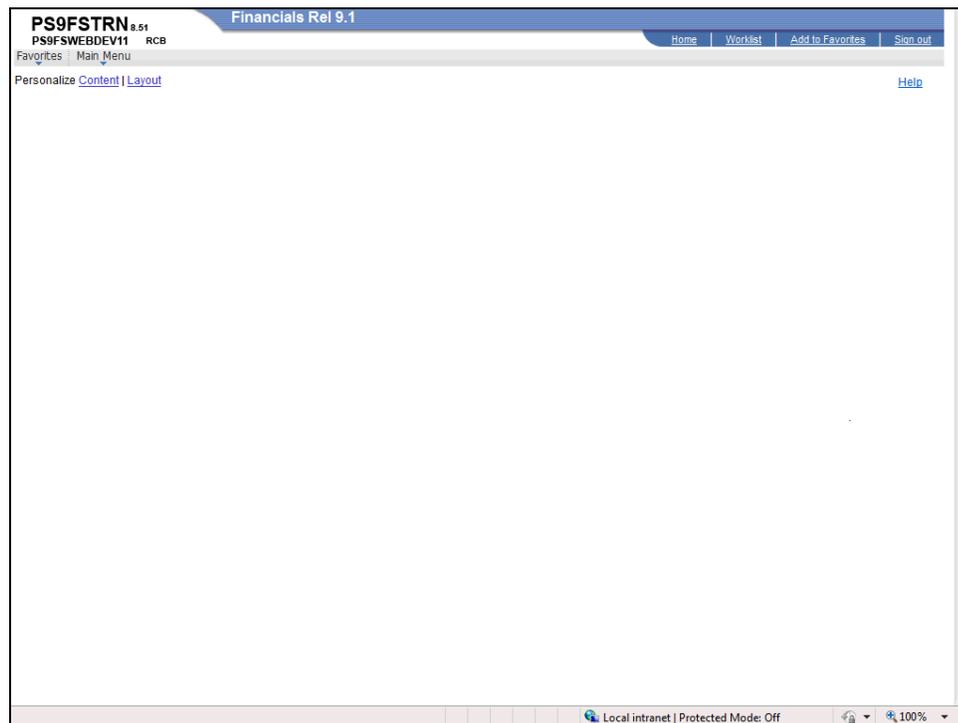
- Hierarchy Joins,
- Standard (Any) Joins, and/or
- Related Record Joins

## Hierarchy Joins

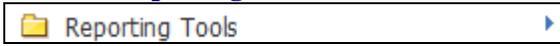
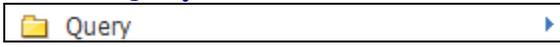
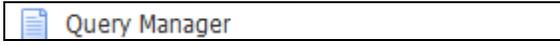
### Procedure

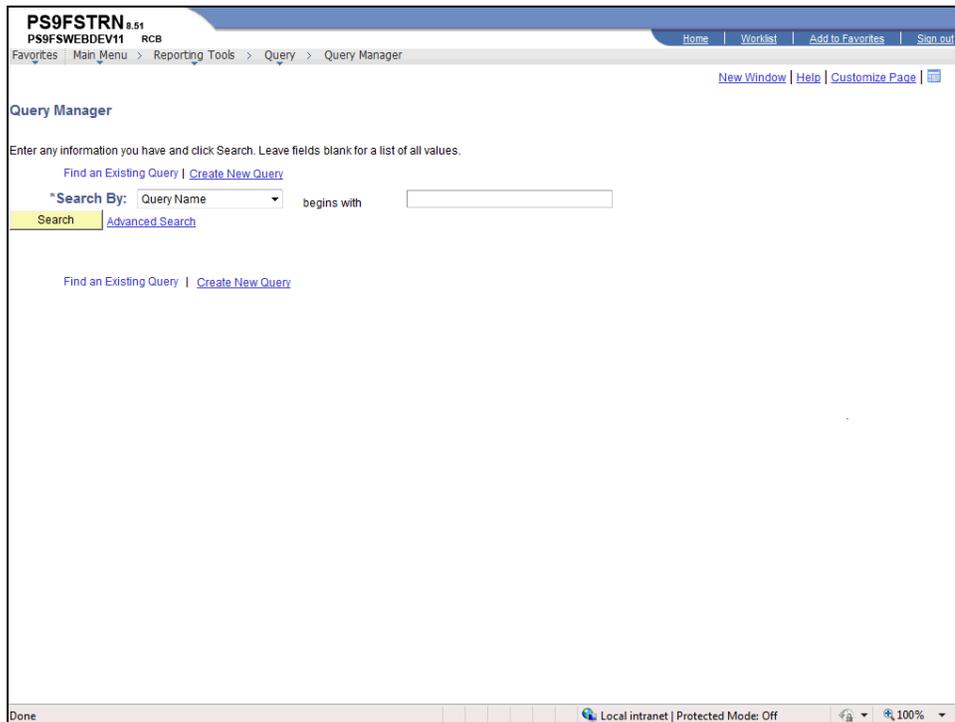
In this topic you will learn how to create **Hierarchy Joins**.

Step	Action
1.	<p>A Hierarchy Join uses tables/records that are related through a parent-child relationship. A child table is a table that uses all the same key fields as its parent, plus one or more additional keys. Hierarchy Joins are the strongest of the three joins, and are predefined in the system. This means the parent-child relationships are already identified and defined within the system.</p> <p>In this example, you will create a Hierarchy Join when the <code>VENDOR_ADDR</code> record (child) is joined to the <code>VENDOR</code> table (parent).</p>

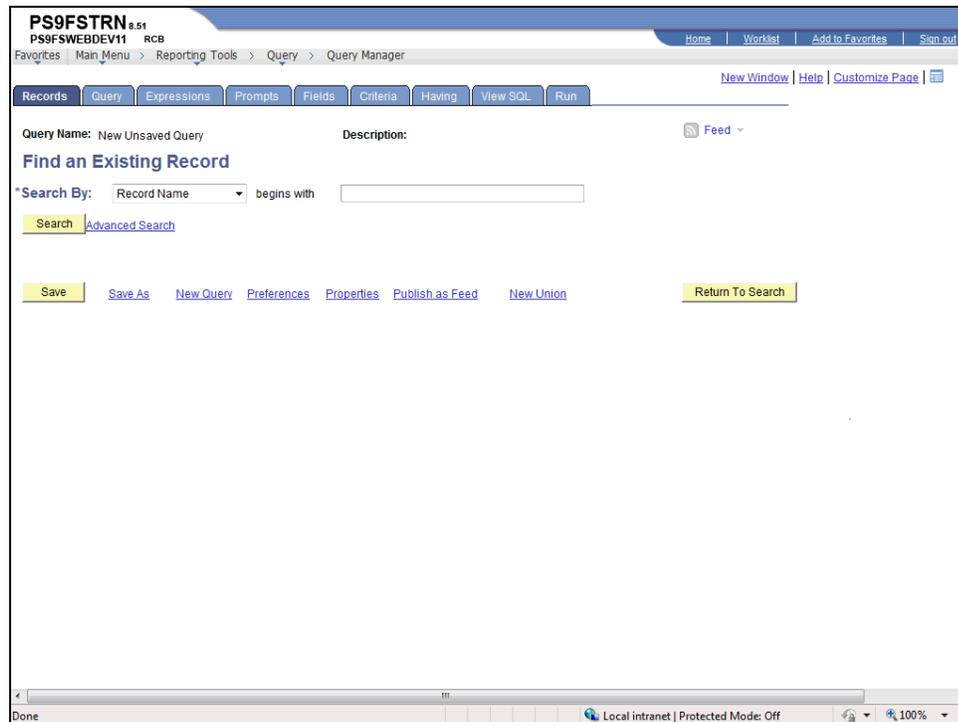


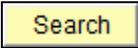
Step	Action
2.	<p>Click the <b>Main Menu</b> button.</p> 

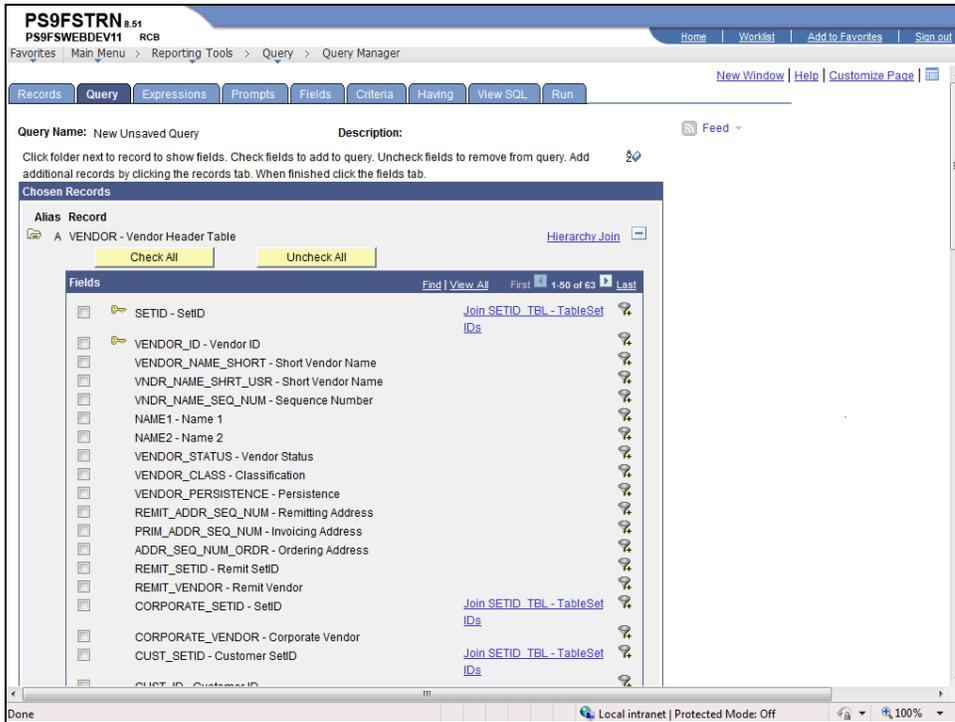
Step	Action
3.	Click the <b>Reporting Tools</b> menu. 
4.	Click the <b>Query</b> menu. 
5.	Click the <b>Query Manager</b> menu. 



Step	Action
6.	Click the <b>Create New Query</b> link. 



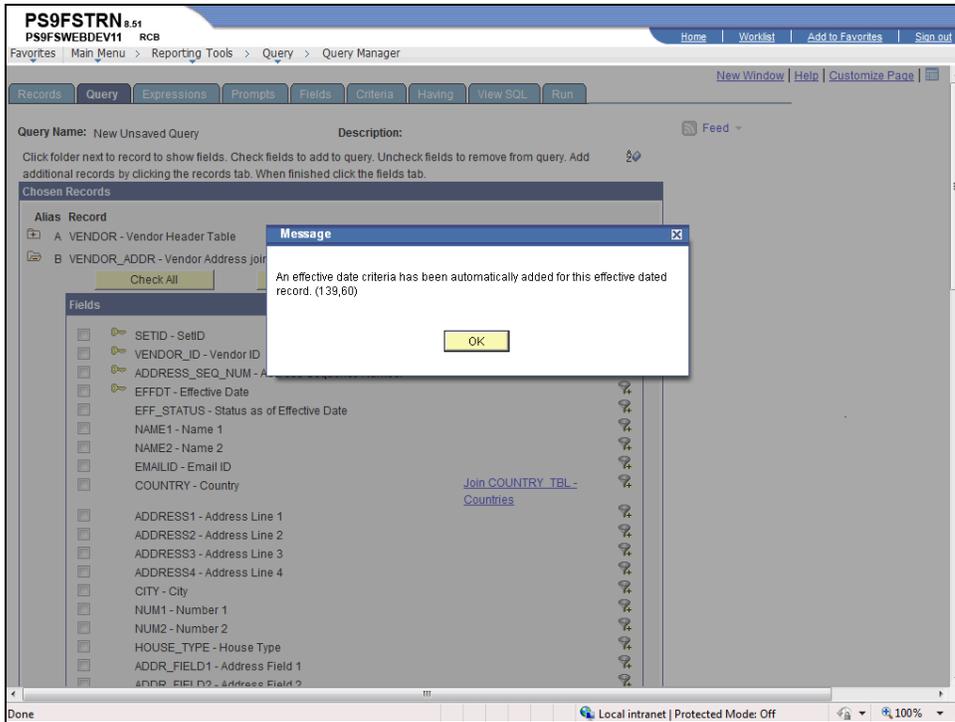
Step	Action
7.	You will first search for the parent table/record.  Enter the desired information into the <b>begins with</b> field. Enter " <b>VENDOR</b> ".
8.	Click the <b>Search</b> button. 
9.	Click the <b>Add Record</b> link for the VENDOR - Vendor Header Table option. 
10.	When a record is selected, the system assigns an alias name to the record. When using joins, the alias name determines the order of the joins. In this example, the VENDOR table is given the alias "A" because it is the first record used.



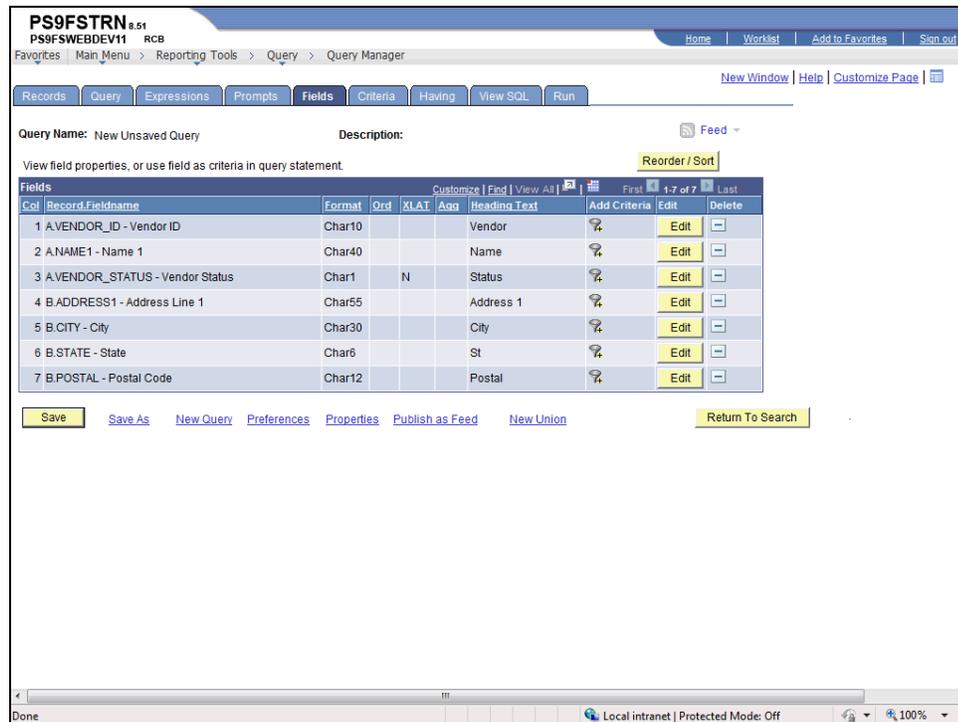
Step	Action
11.	<p>From the VENDOR table, you will select the <b>VENDOR_ID</b>, <b>NAME1</b> and <b>VENDOR_STATUS</b> fields.</p> <p>Click the <b>Select</b> option.</p> 
12.	<p>Click the checkbox in front of the <b>VENDOR_ID</b> field.</p> 
13.	<p>Click the checkbox in front of the <b>NAME1</b> and the <b>VENDOR_STATUS</b> fields.</p> 
14.	<p>By clicking the Hierarchy Join link, all of the records that have a parent/child relationship with the VENDOR table display.</p> <p>Click the <b>Hierarchy Join</b> link.</p> 



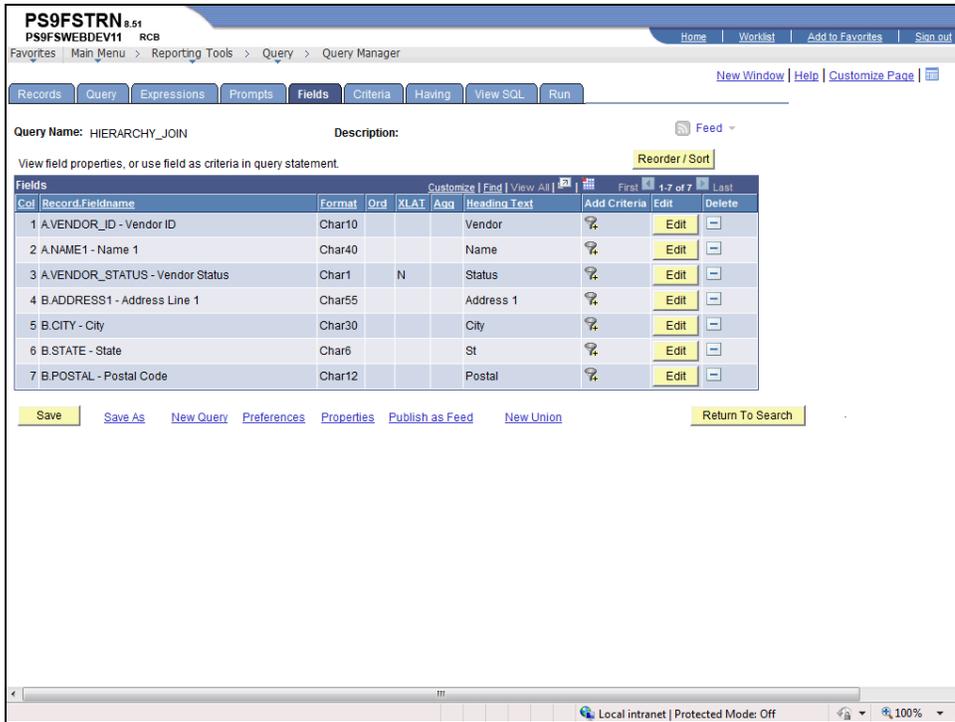
Step	Action
15.	<p>The VENDOR table is the parent record. The VENDOR_ADDR record is a child of the VNDR_ADDR_SCROL record. The VNDR_ADDR_SCROL record is a child of the parent record VENDOR table.</p> <p>Click the <b>VENDOR_ADDR - Vendor Address</b> link.</p> <p><a href="#">VENDOR_ADDR - Vendor Address</a></p>



Step	Action
16.	<p>An Effective Date message will display when a record is selected. This allows you to modify the criteria and retrieve rows of data within a specified time frame. All data will be retrieved with effective dates prior to the current date.</p> <p>Click the <b>OK</b> button.</p> 
17.	<p>The "B" alias has been assigned for the VENDOR_ADDR record. The system will first retrieve data for the "A" record and then the data for the "B" record.</p>
18.	<p>Select the following fields from the VENDOR_ADDR record:</p> <p><b>ADDRESS1</b> <b>CITY</b> <b>STATE</b> <b>POSTAL</b></p>



Step	Action
19.	<p>The Fields tab displays all the records and fields that are part of the current query.</p> 



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Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Reporting Tools > Query > Query Manager

Records | Query | Expressions | Prompts | **Fields** | Criteria | Having | View SQL | Run

Query Name: HIERARCHY\_JOIN Description: Feed

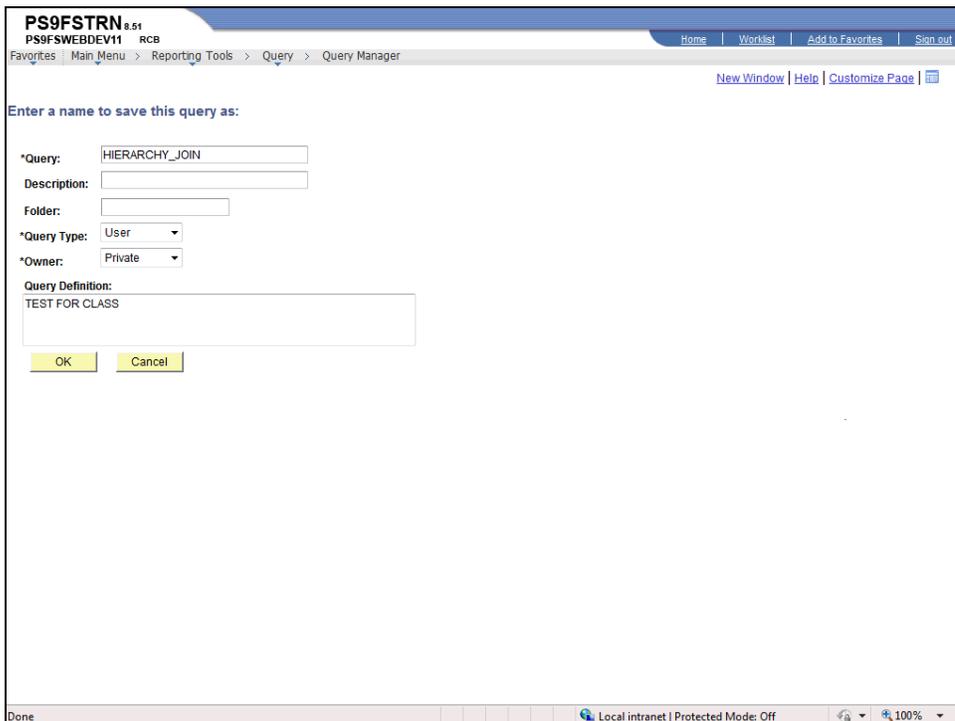
View field properties, or use field as criteria in query statement. Reorder / Sort

Col	Record	Fieldname	Format	Grd	XLAT	Aqa	Heading Text	Add Criteria	Edit	Delete
1	A.VENDOR_ID - Vendor ID		Char10				Vendor		Edit	
2	A.NAME1 - Name 1		Char40				Name		Edit	
3	A.VENDOR_STATUS - Vendor Status		Char1		N		Status		Edit	
4	B.ADDRESS1 - Address Line 1		Char55				Address 1		Edit	
5	B.CITY - City		Char30				City		Edit	
6	B.STATE - State		Char6				St		Edit	
7	B.POSTAL - Postal Code		Char12				Postal		Edit	

Save Save As New Query Preferences Properties Publish as Feed New Union Return To Search

Local intranet | Protected Mode: Off

Step	Action
20.	Click the <b>Save As</b> link. 



**PS9FSTRN 8.61**  
PS9FSWEBDEV11 RCB

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Reporting Tools > Query > Query Manager

New Window | Help | Customize Page |

Enter a name to save this query as:

\*Query: HIERARCHY\_JOIN

Description:

Folder:

\*Query Type: User

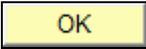
\*Owner: Private

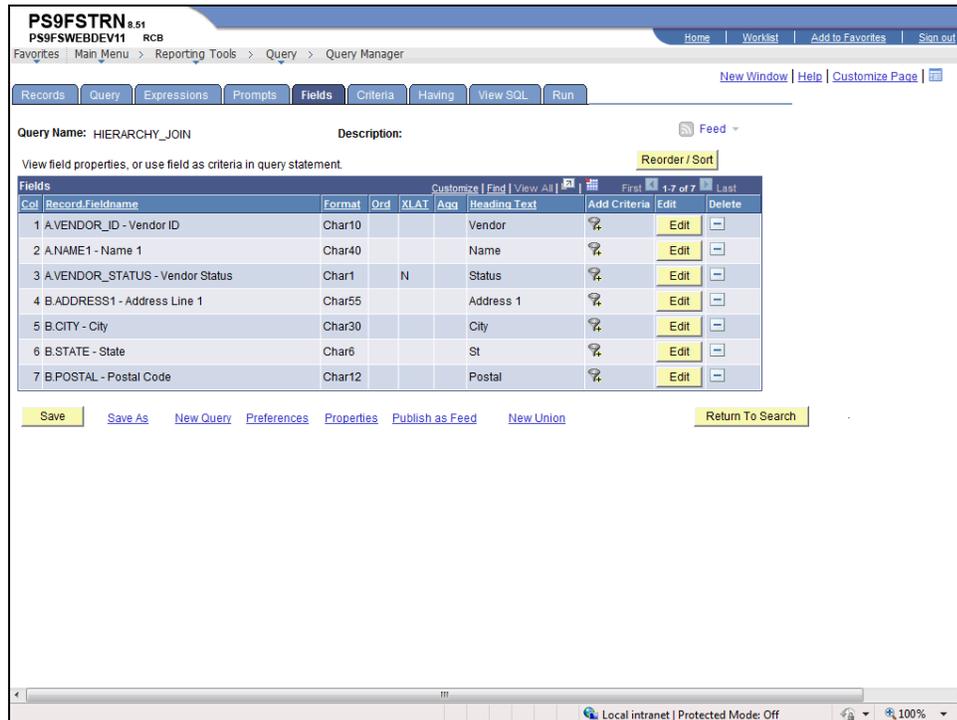
Query Definition:  
TEST FOR CLASS

OK Cancel

Done

Local intranet | Protected Mode: Off

Step	Action
21.	<p>Enter the name of your query. In this example we named the query HIERARCHY_JOIN, you may want to add a Query Definition, such as TEST FOR CLASS.</p> <p>Click the <b>OK</b> button.</p> 



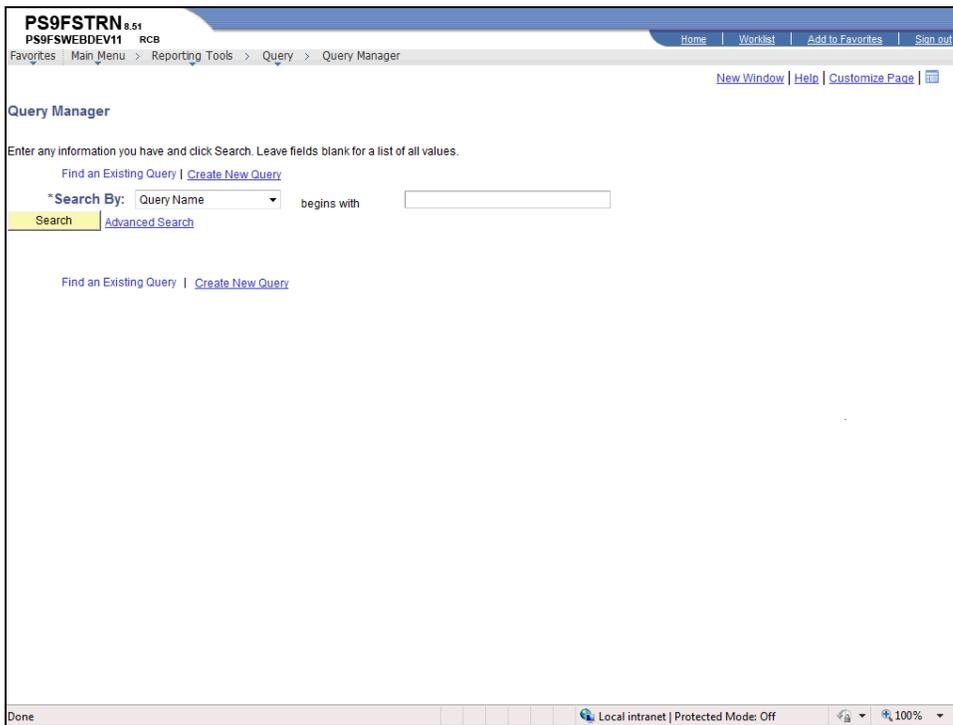
Step	Action
22.	<p>Click the <b>Run</b> tab to run and test your Hierarchy Join.</p> 
23.	<p>This completes <b>Hierarchy Joins</b>. <b>End of Procedure.</b></p>

## Standard (Any) Joins

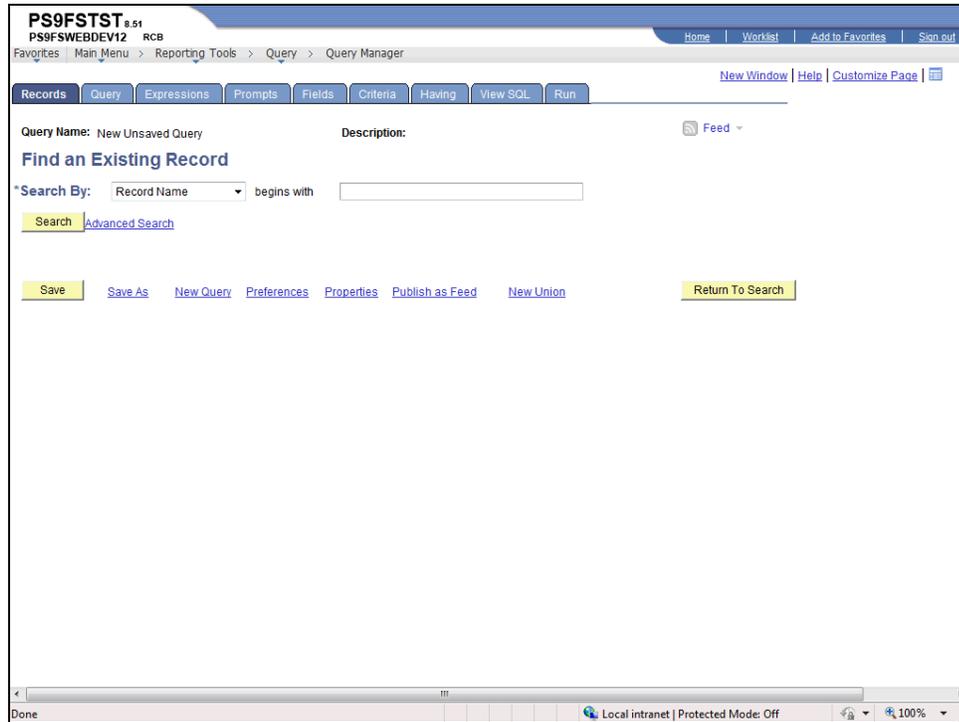
### Procedure

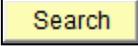
In this topic you will learn how to create a **Standard (Any) Join**.

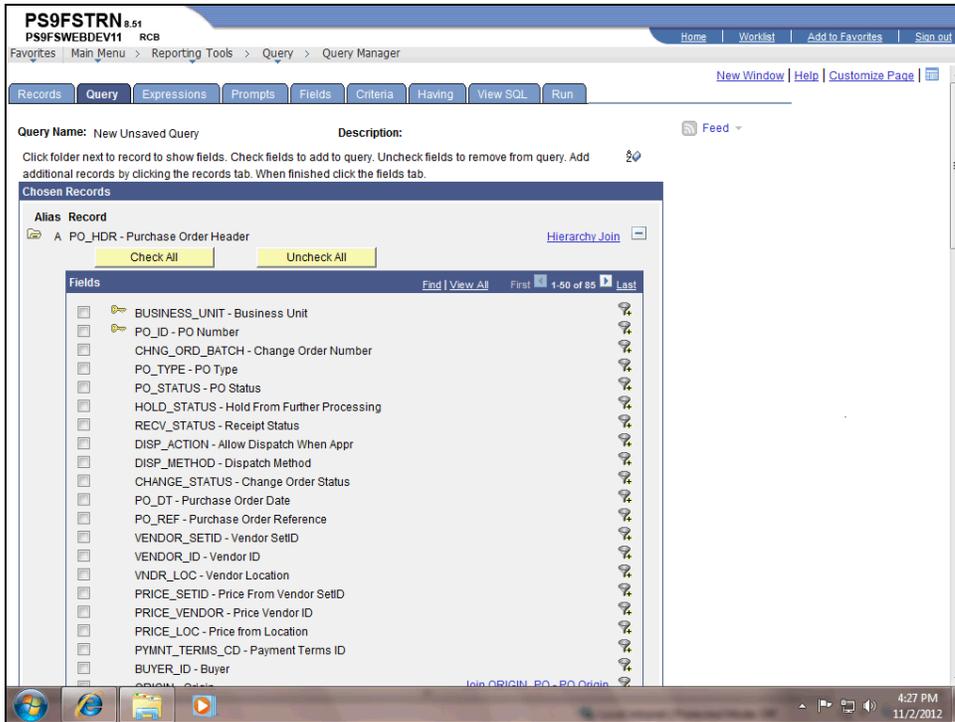
Step	Action
1.	<p>Query Manager allows the creation of a join between two records (any record join) by selecting your initial base record, then returning to the Record page to select the second record.</p> <p>Unlike Hierarchy Joins, Standard (Any) joins are not predefined in the system. You must manually join the tables/records when using a Standard (any) Join.</p> <p>When creating a Standard Join, the records you wish to join <b>must</b> have a <b>common key field</b> for joining. Query will attempt to automatically join the records based on the keys in each record.</p>
2.	<p>In this example, you will join the PO_HDR record and the PO_LINE_DISTRIB record to retrieve Purchase orders between a date range for a specific business unit and find the merchandise amount and the department ID number.</p>



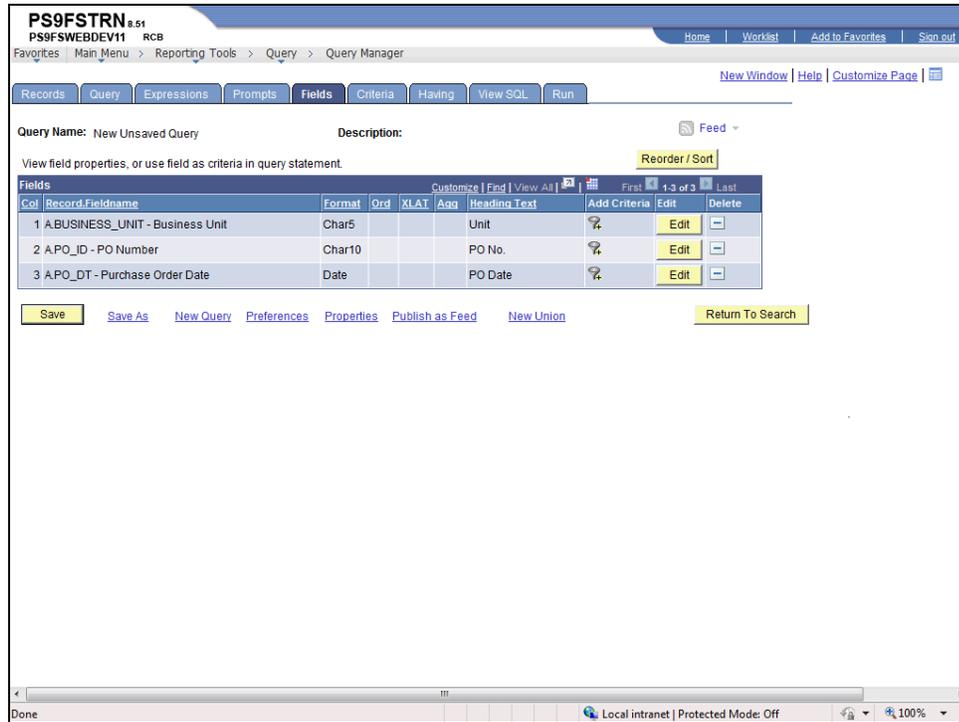
Step	Action
3.	<p>Click the <b>Create New Query</b> link.</p> <p><a href="#">Create New Query</a></p>



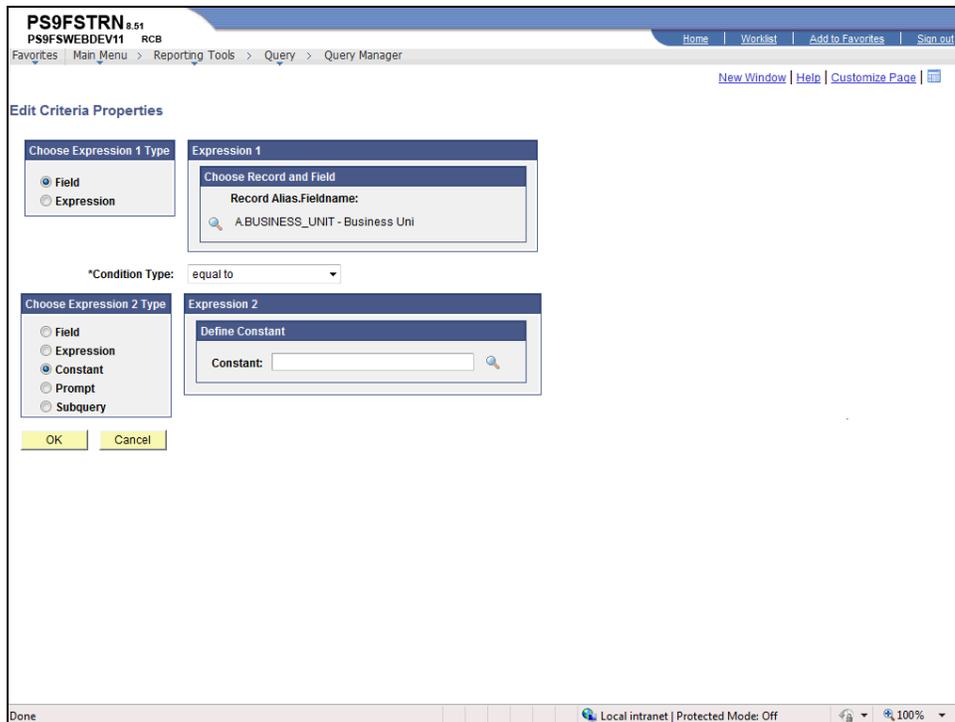
Step	Action
4.	Enter the desired information into the <b>begins with</b> field. Enter " <b>PO_HDR</b> ".
5.	Click the <b>Search</b> button. 
6.	Click the <b>Add Record</b> link. 

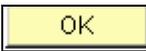


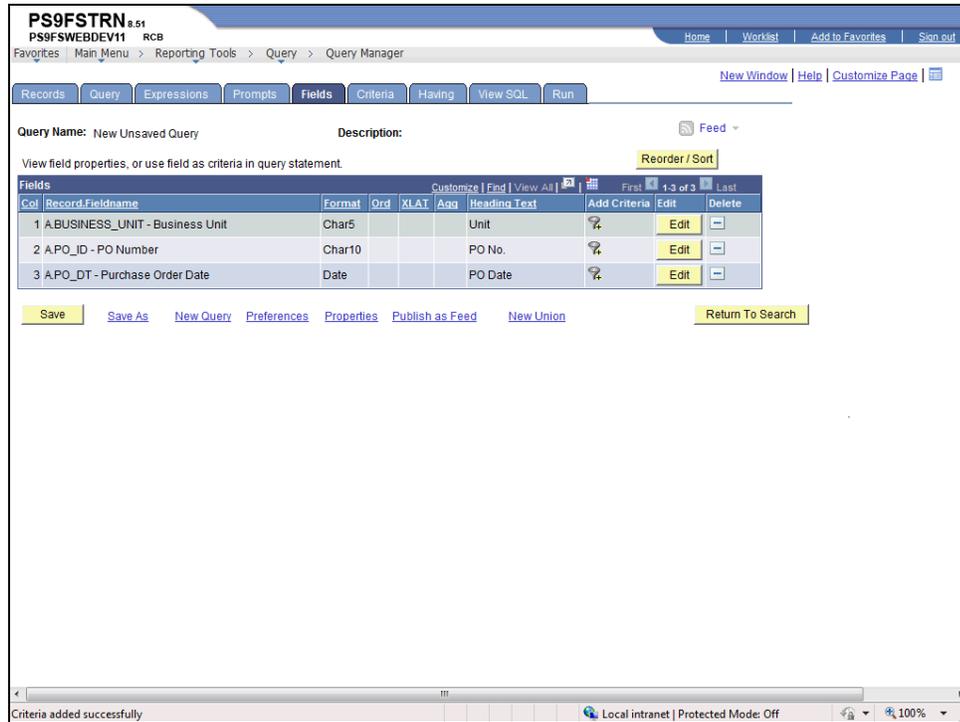
Step	Action
7.	Click the checkbox for the <b>BUSINESS_UNIT</b> field 
8.	Click the checkbox for the <b>PO_ID</b> field. 
9.	Click the checkbox for the <b>PO_DT</b> field. Click the <b>Select</b> option. 
10.	Click the <b>Fields</b> tab to view the selected fields 



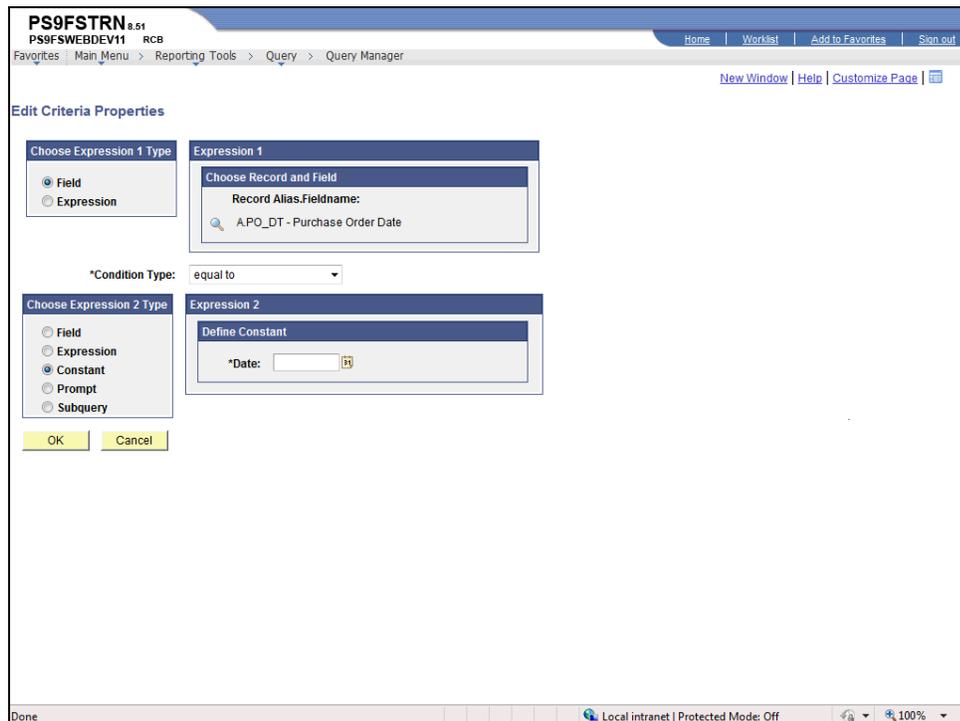
Step	Action
11.	Click the <b>Add Criteria</b> button for the BUSINESS_UNIT to add criteria.
	

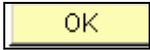


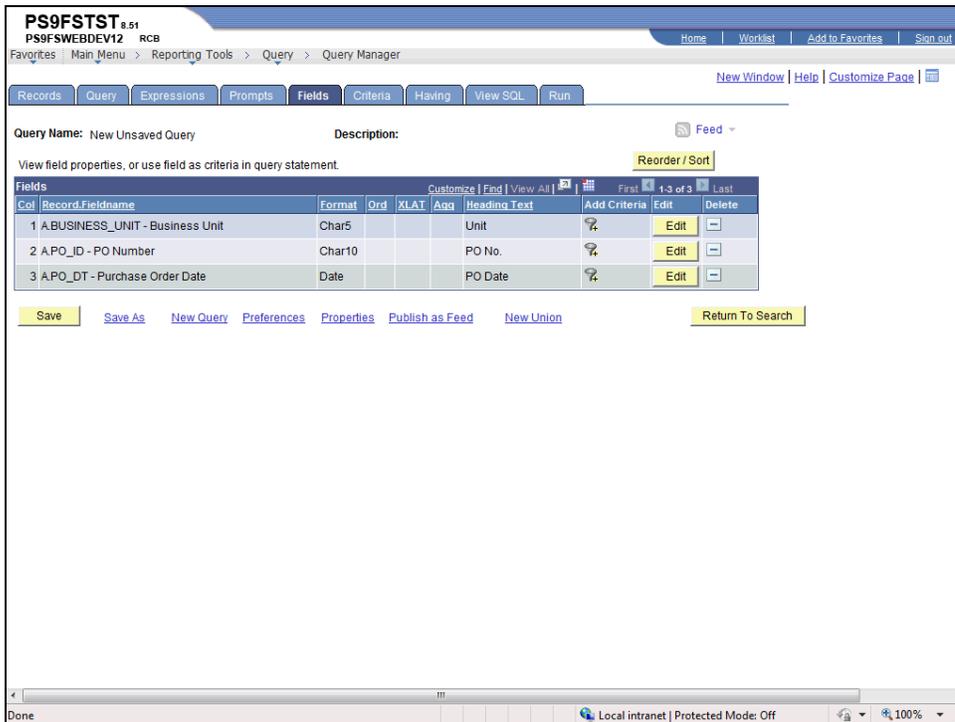
Step	Action
12.	Enter the desired information into the <b>Constant</b> field. Enter " <b>BRFHS</b> ".
13.	Click the <b>OK</b> button. 



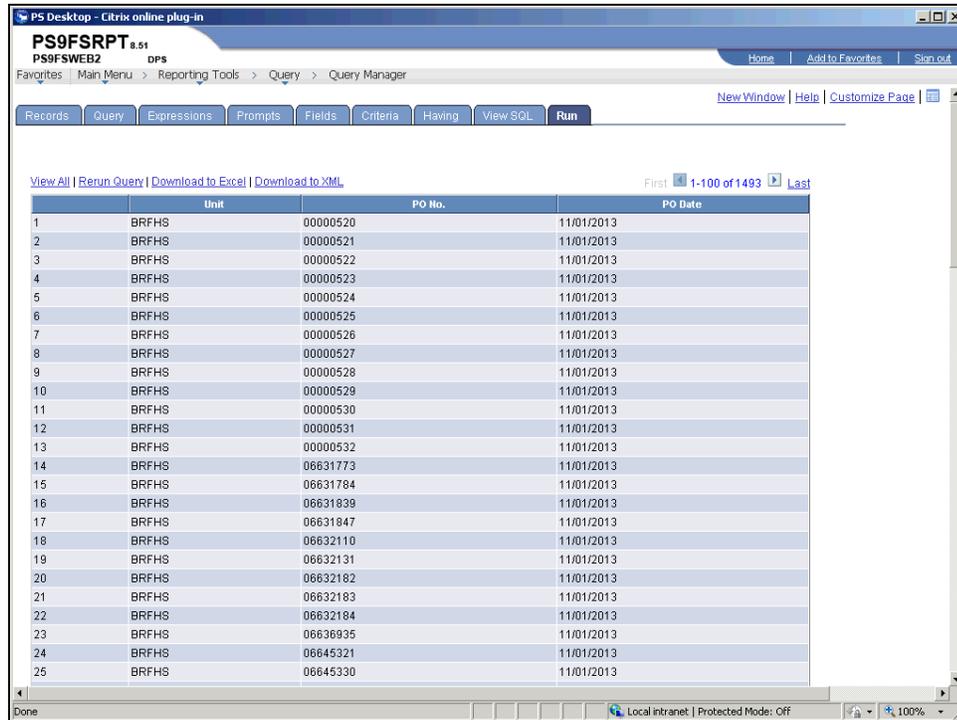
Step	Action
14.	Click the <b>Add Criteria</b> button to add a date range. 



Step	Action
15.	Click the <b>between</b> option from the drop-down list. 
16.	Enter the following date range: 11/01/13 - 11/30/13  <b>Note:</b> When creating queries it is optimal to select a smaller data sample for testing, such as 11/01/13-11/30/13. This will result in a quicker run time, and make it easier to test and troubleshoot your query.  Enter the desired information into the <b>Date</b> field. Enter " <b>11/01/13</b> ".
17.	Enter the desired information into the <b>Date 2</b> field. Enter " <b>11/30/13</b> ".
18.	Click the <b>OK</b> button. 

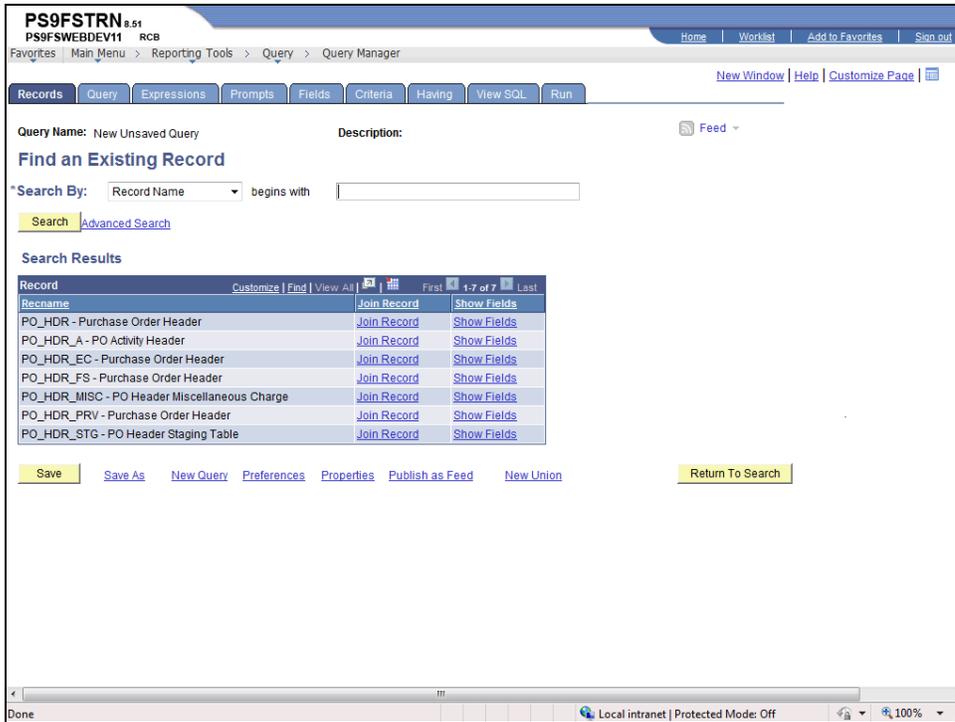


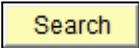
Step	Action
19.	Click the <b>Run</b> tab. 

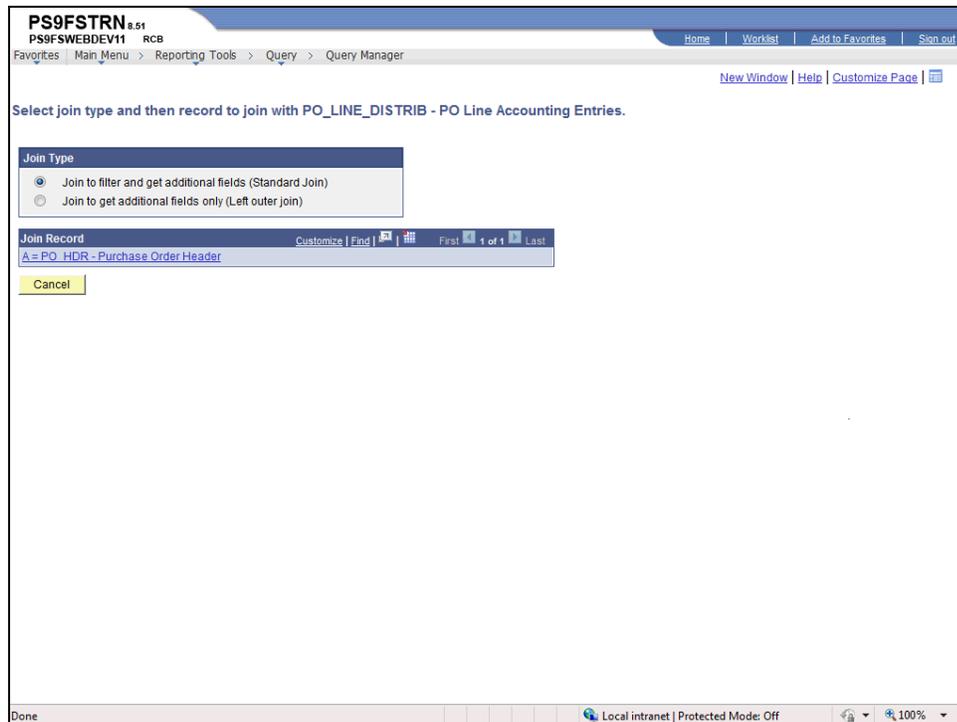


Step	Action
20.	Click the <b>Records</b> tab to select the other record to join to the PO_HDR record.

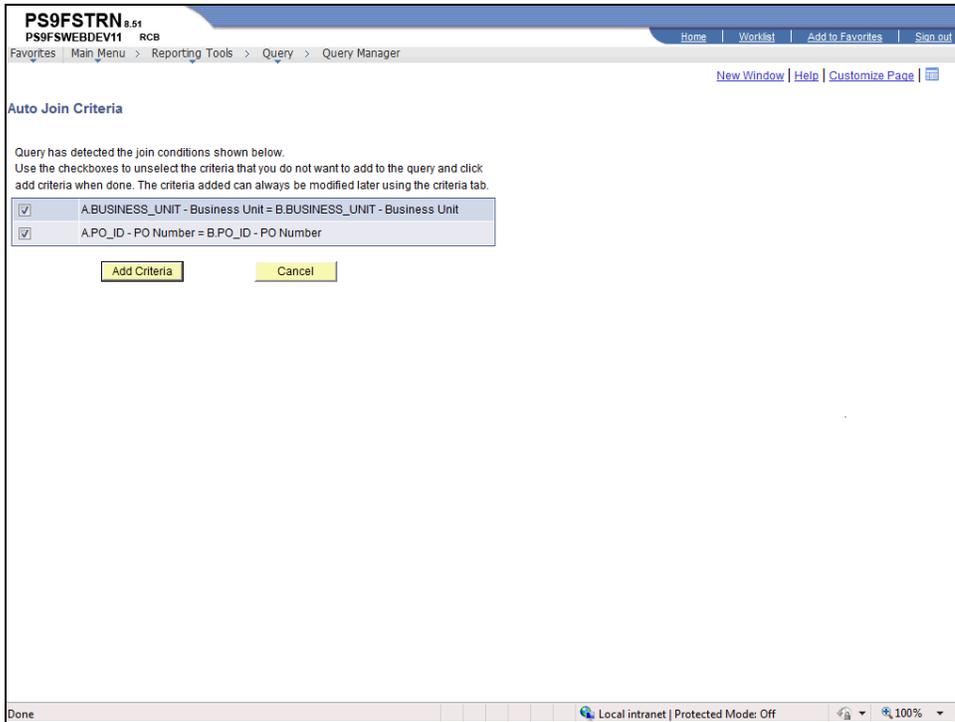




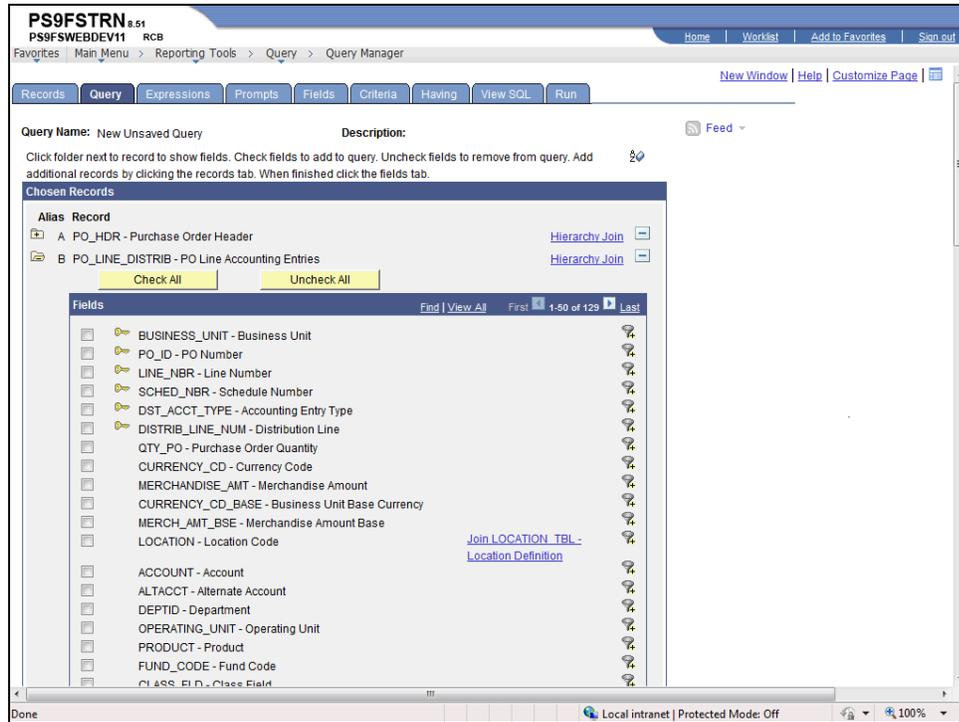
Step	Action
21.	Enter the desired information into the <b>begins with</b> field. Enter <b>"PO_LINE_DISTRIB"</b> .
22.	Click the <b>Search</b> button. 
23.	Click the <b>Join Record</b> link. 



Step	Action
24.	<p>In the Join Type section, the system defaults to the "Join to filter and get additional fields (Standard Join)". This should remain as defaulted.</p> <p>Click the <b>A = PO_HDR - Purchase Order Header</b> link.</p> <p><a href="#">A = PO_HDR - Purchase Order Header</a></p>



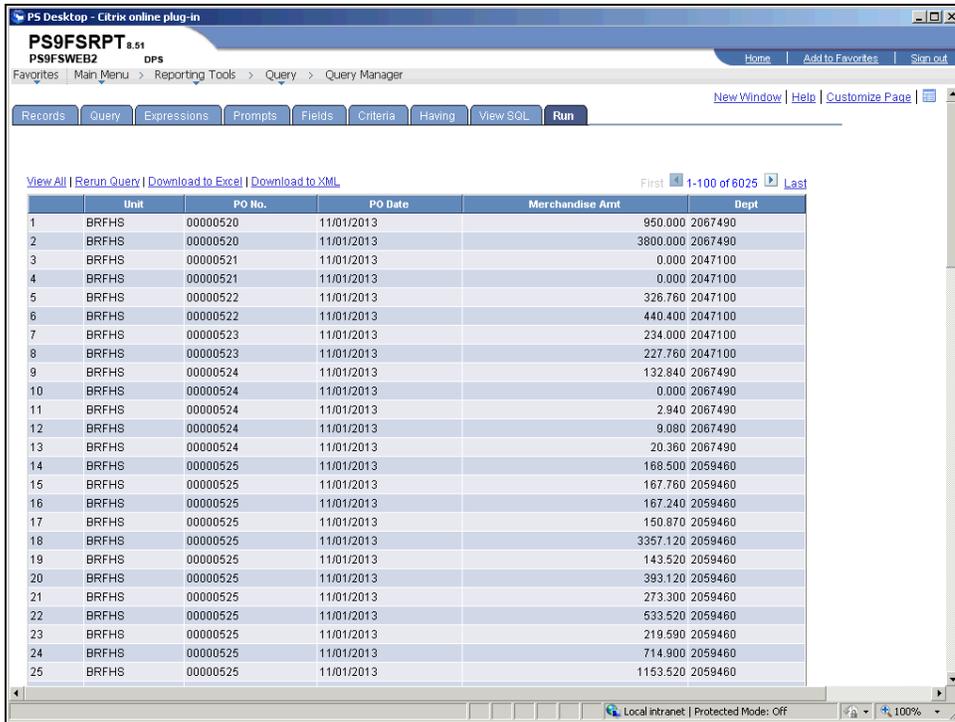
Step	Action
25.	Click the <b>Add Criteria</b> button.



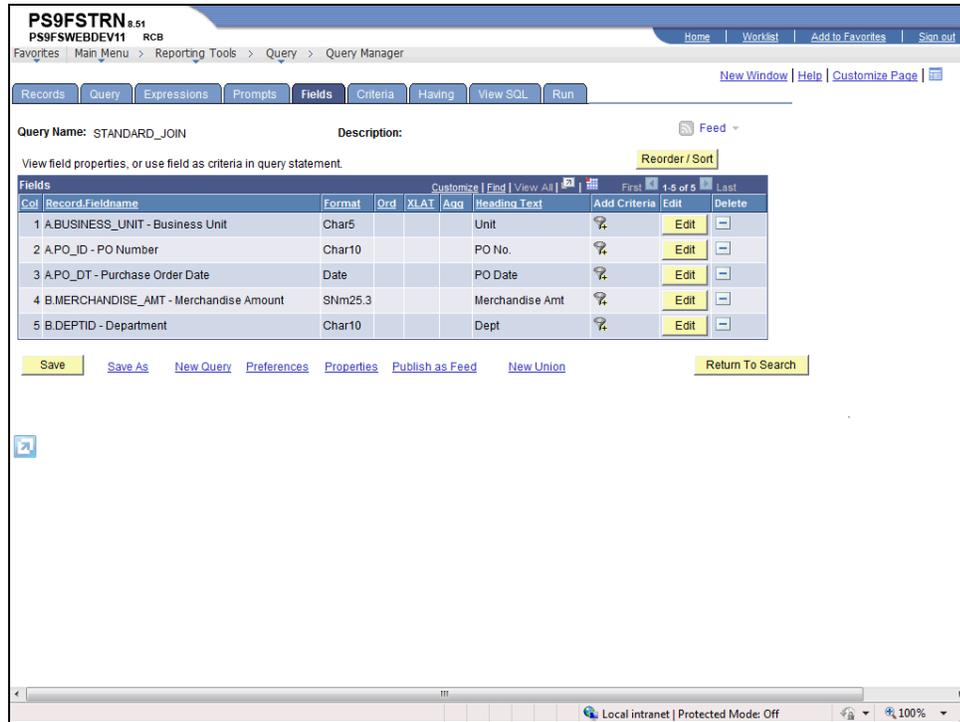
Step	Action
26.	Click the checkbox for the <b>MERCANDISE_AMT</b> and the <b>DEPTID</b> fields. 
27.	Click the <b>Run</b> tab to see if the join was successful. 
28.	The results for the Standard Join query displays.

# Training Guide

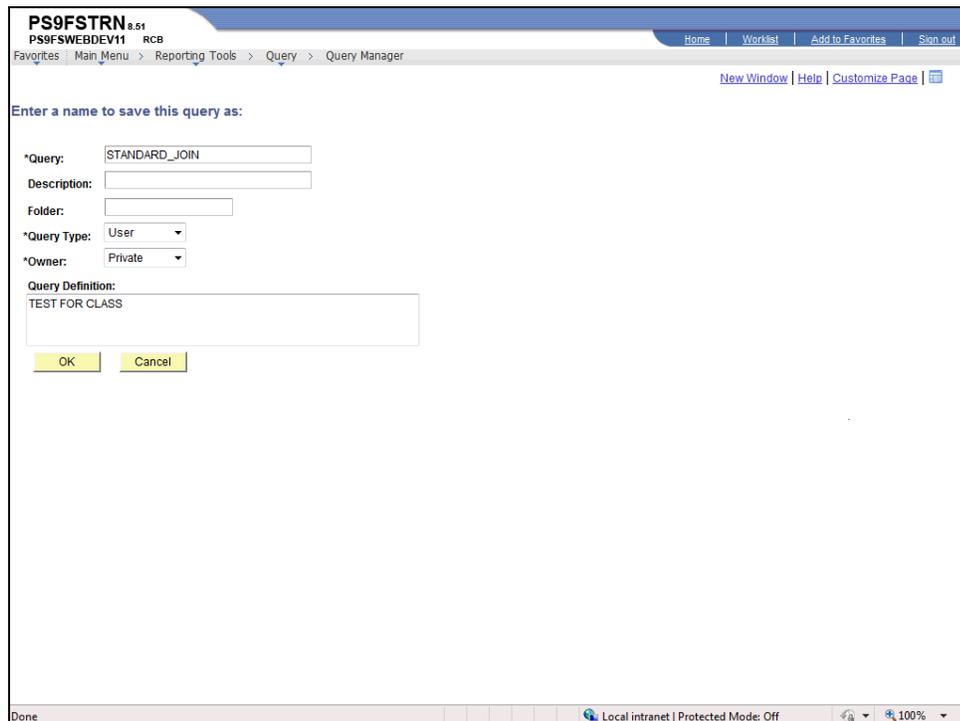
## BRF\_Financials\_Query\_9\_1

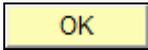


Step	Action
29.	Click the <b>Fields</b> tab. 



Step	Action
30.	Click the <b>Save As</b> link to save your query. 



Step	Action
31.	<p>Enter the name of your query and if desired, enter a longer description of the query in the Query Definition box.</p> <p>Click the <b>OK</b> button.</p> 
32.	<p>This completes <b>Standard (Any) Joins</b>.</p> <p><b>End of Procedure.</b></p>

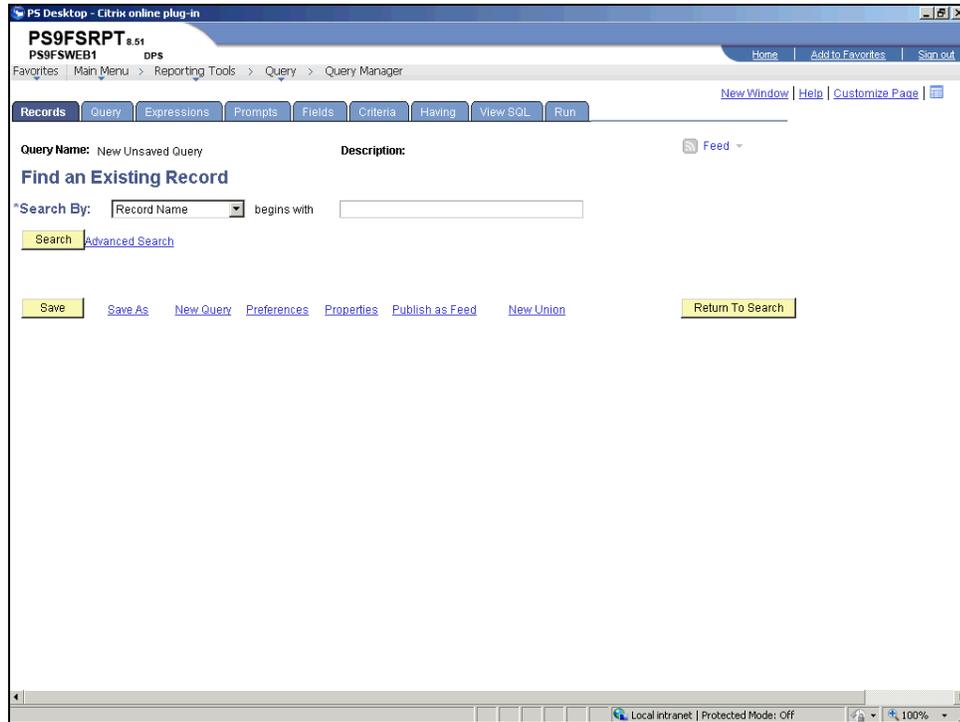
## Related Record Joins

### Procedure

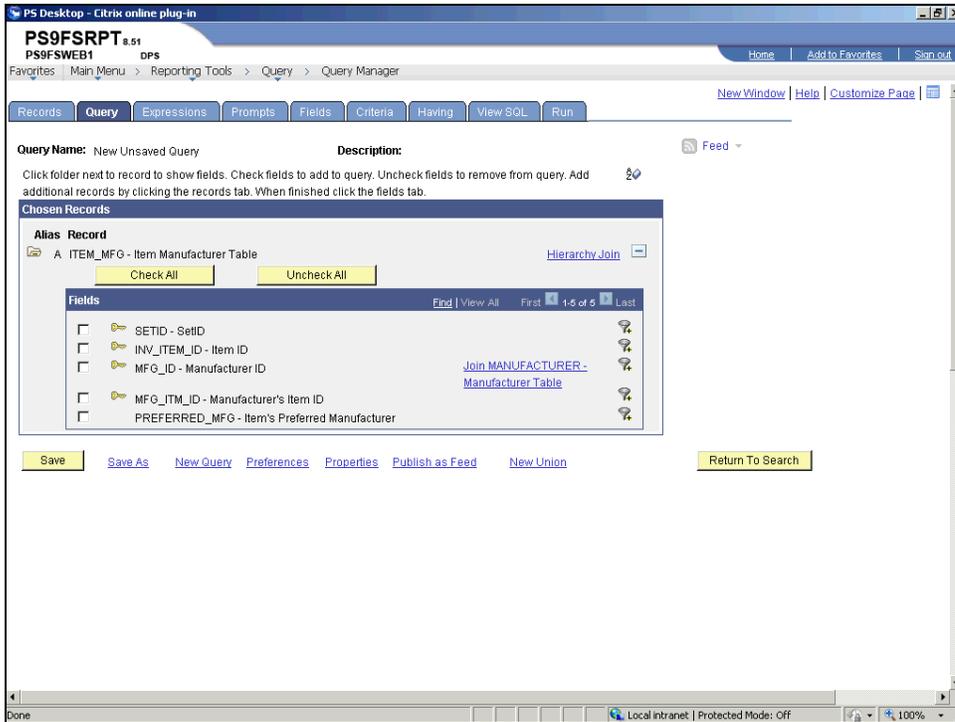
In this topic you will learn how to create **Related Record Joins**.

**Navigation:** Click the **Main Menu link**>**Reporting Tools**>**Query**>**Query Manager**

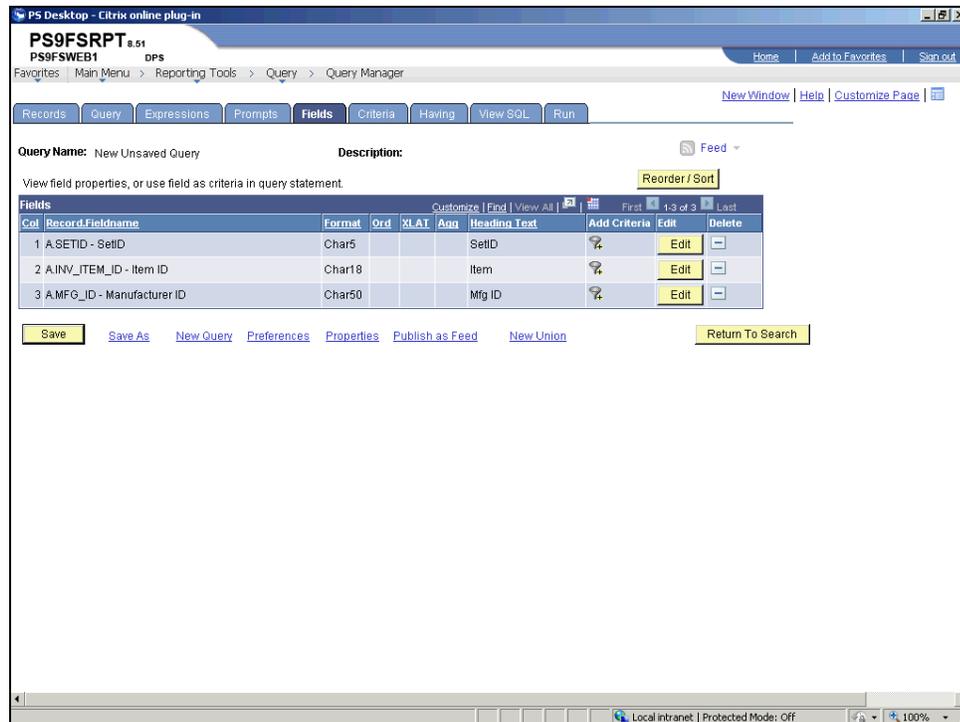
Step	Action
1.	<p>In a related join, you can automatically join two records based on a relationship that has been predefined in the record designer. The Related Record Joins displays as a link to the right of the field. The relationship between the fields has already been identified, so no criteria needs be added.</p> <p>Click the <b>Create New Query</b> link</p>
2.	<p>In this example you will create a query to retrieve Inventory item ID, Manufacturer's ID, and the Manufacturer's name.</p> <p>In order to retrieve our data, we will need to join two records, the ITEM_MFG and the MANUFACTURER.</p>



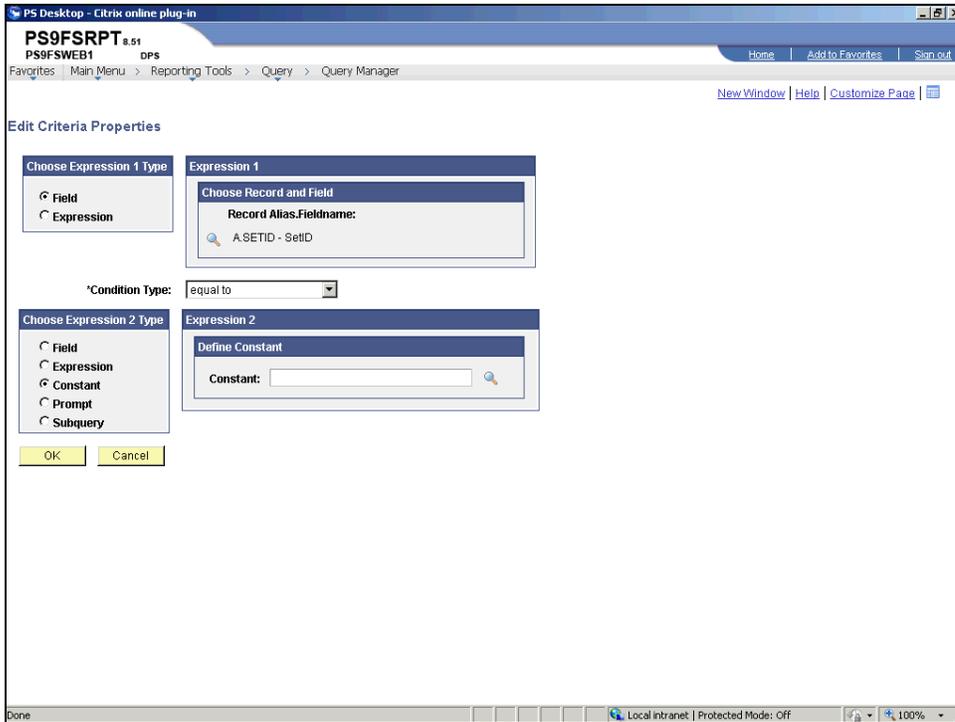
Step	Action
3.	Enter the desired information into the <b>begins with</b> field. Enter " <b>ITEM_MFG</b> ".
4.	Click the <b>Search</b> button. 
5.	Click the <b>Add Record</b> link. 

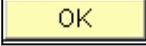


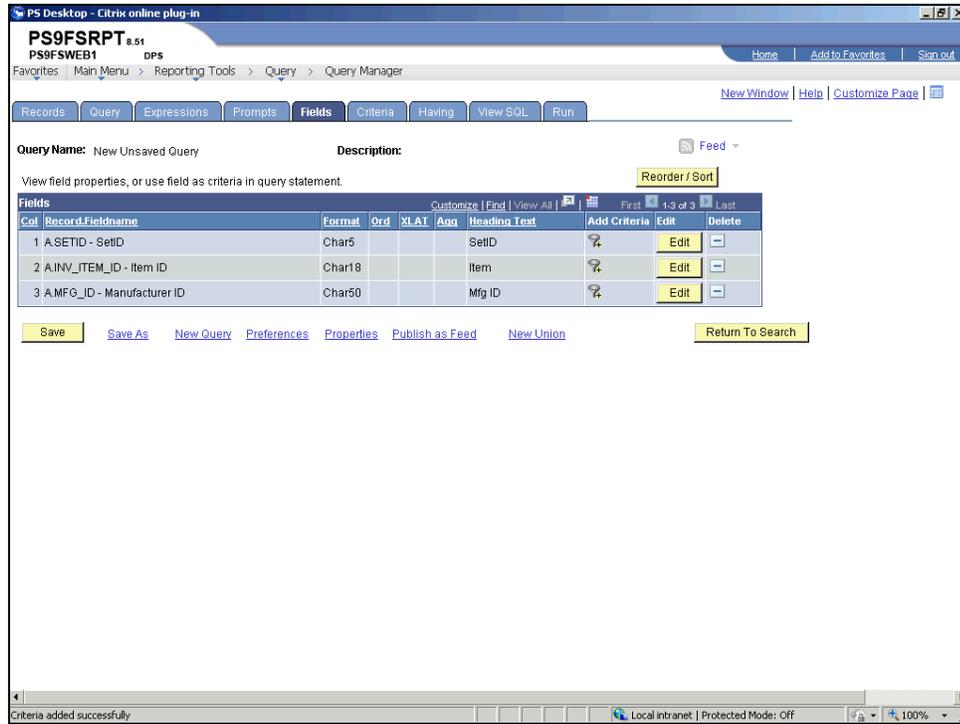
Step	Action
6.	<p>Select the following fields in the <b>ITEM_MFG</b> record:</p> <p><b>SETID</b>  <b>INV_ITEM_ID</b>  <b>MFG_ID</b></p> <p>.</p> <input type="checkbox"/>
7.	<p>Click the <b>Fields</b> tab.</p> <input type="button" value="Fields"/>



Step	Action
8.	<p><b>Note:</b> Add Criteria to the SETID and INV_ITEM_ID fields to retrieve a small data sample for testing.</p> <p>Click the <b>Add Criteria</b> button for the SETID field.</p> 



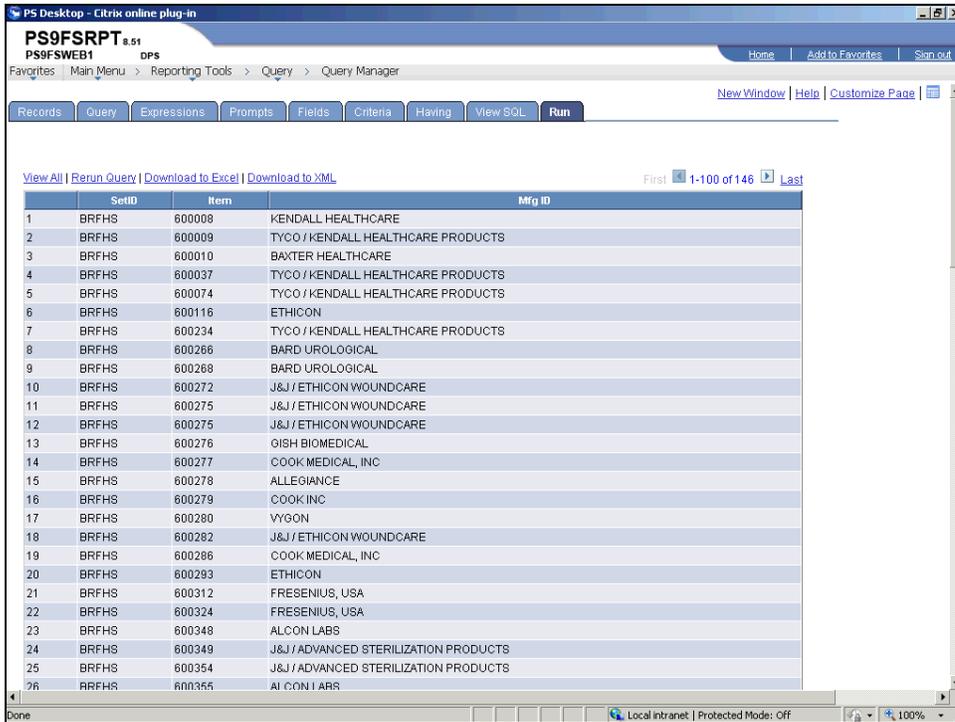
Step	Action
9.	Enter the desired information into the <b>Constant</b> field. Enter " <b>BRFH</b> ".
10.	Click the <b>OK</b> button. 
11.	Click the add <b>Criteria Button</b> . 
12.	Select <b>between</b> from the Conditions Type drop-down list.
13.	Enter the constants for Inventory items. In this example you are looking for inventory item ID's between: 600000 - 600600.
14.	Click the <b>OK</b> button. 



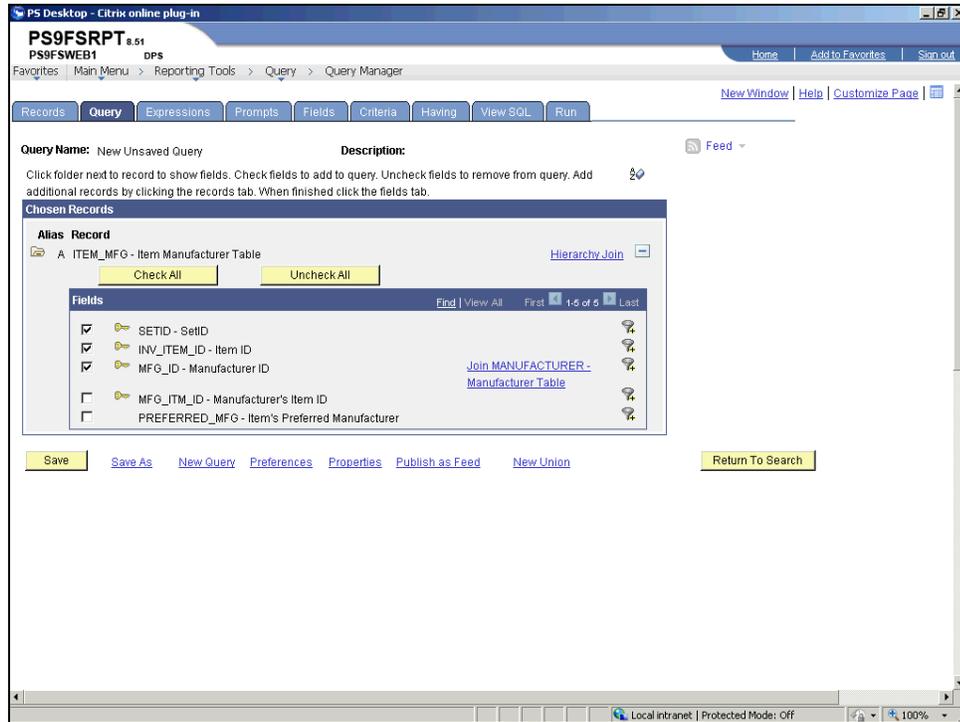
Step	Action
15.	Click the <b>Run</b> tab. 

# Training Guide

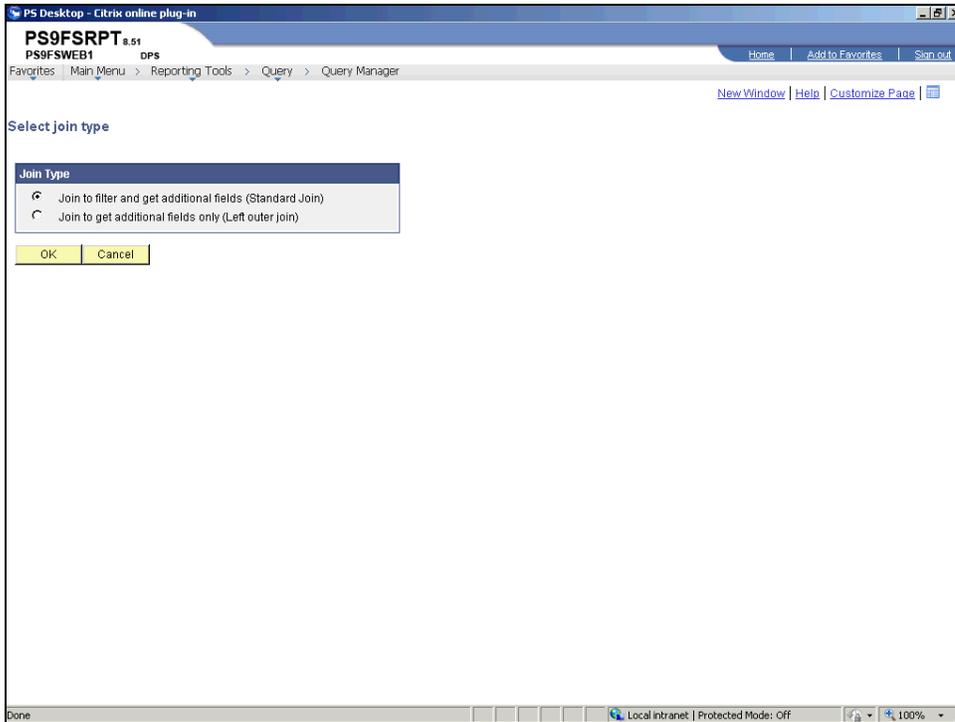
## BRF\_Financials\_Query\_9\_1



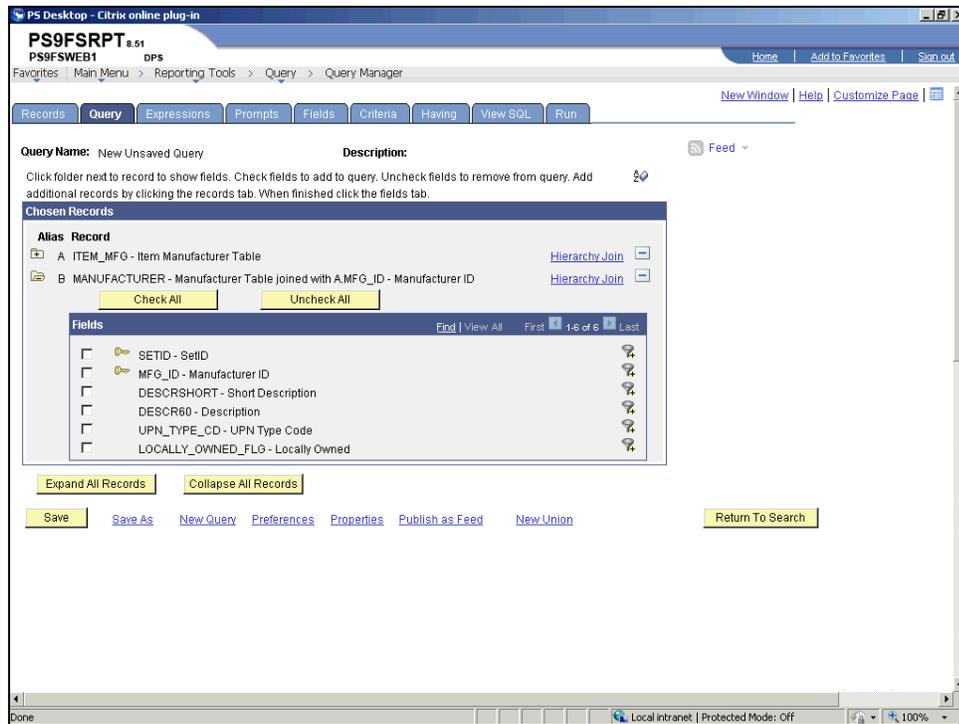
Step	Action
16.	Click the <b>Query</b> tab to Join the MANUFACTURER record. 



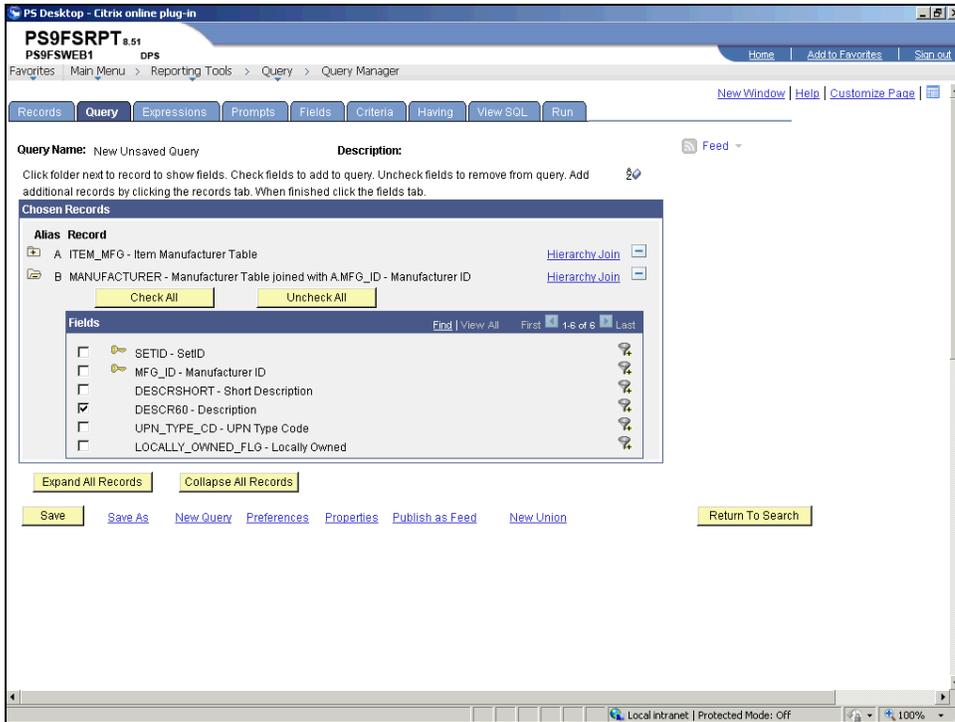
Step	Action
17.	<p>Click the <b>Join MANUFACTURER - Manufacturer Table</b> link</p> <p><b>Note:</b> Like Hierarchy Joins, Related Record Joins are predefined in the system. The relationship between the fields has already been identified, so no criteria needs to be added.</p>



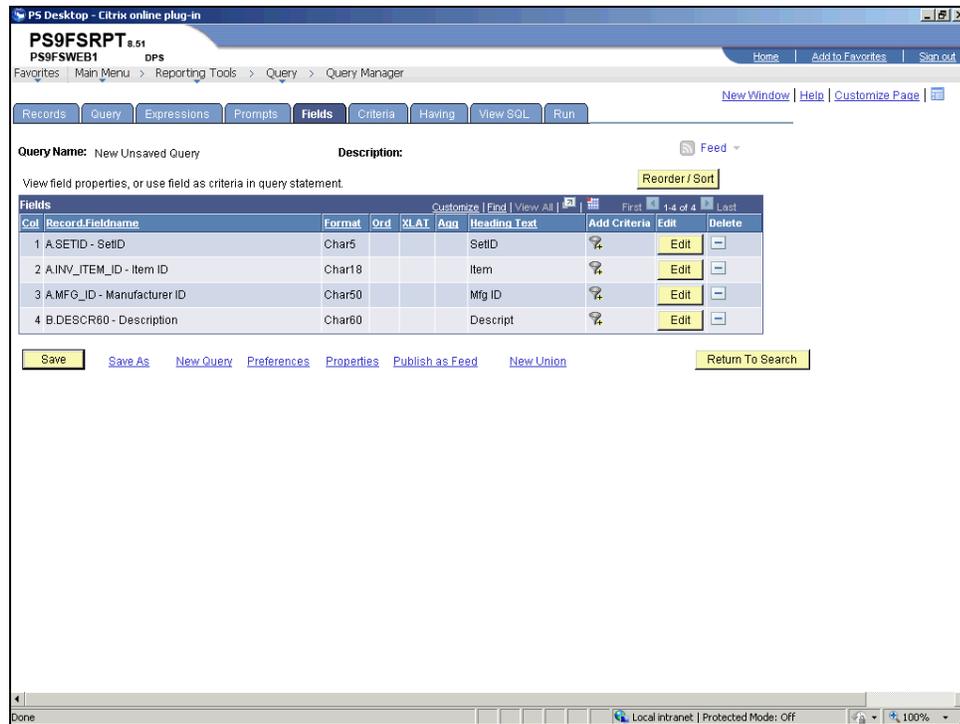
Step	Action
18.	<p>In the Join Type box, the "Join to filter and get additional fields (Standard Joins)" option defaults and should remain as defaulted.</p> <p>Click the <b>OK</b> button.</p> 



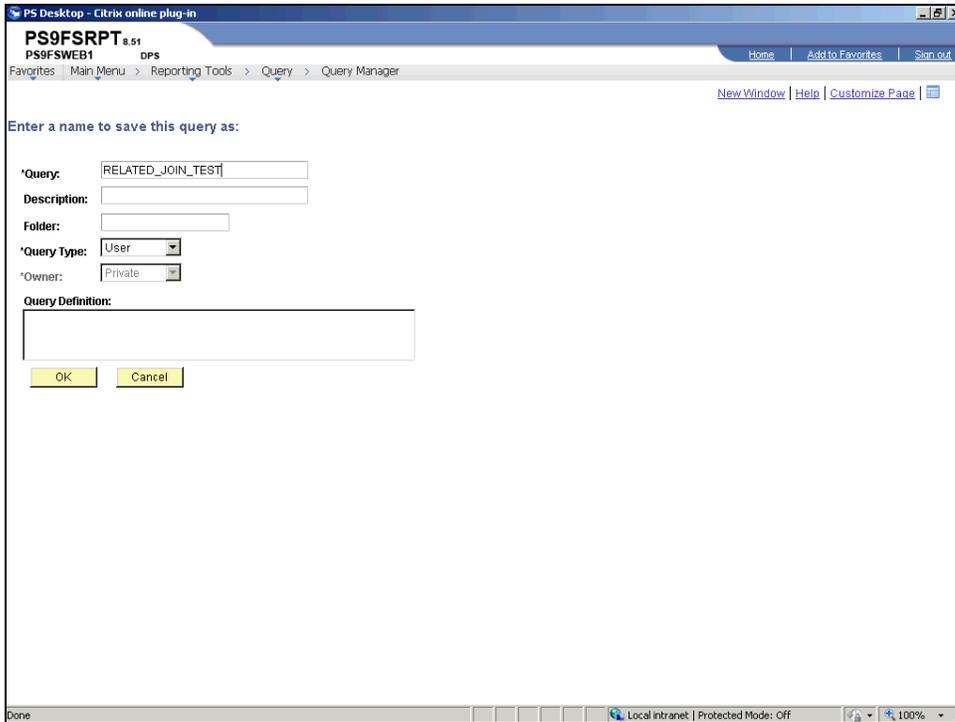
Step	Action
19.	<p><b>Note:</b> The (B) alias record has been assigned to the MANUFACTURER record.</p> <p><b>Select</b> the DESCR60 field to display the Manufacturer's name.</p> 

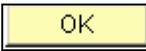


Step	Action
20.	Click the Fields tab to view the fields you selected for your query. 



Step	Action
21.	Click the <b>Run</b> tab to view results. 
22.	If the query produced the desired results, you would save and name your query. Click the <b>Save As</b> link. 



Step	Action
23.	Enter the Query Name and if you like you can enter a Query Definition.  Click the <b>OK</b> button. 
24.	This completes <b>Related Record Joins</b> . <b>End of Procedure.</b>

## Exercise 6

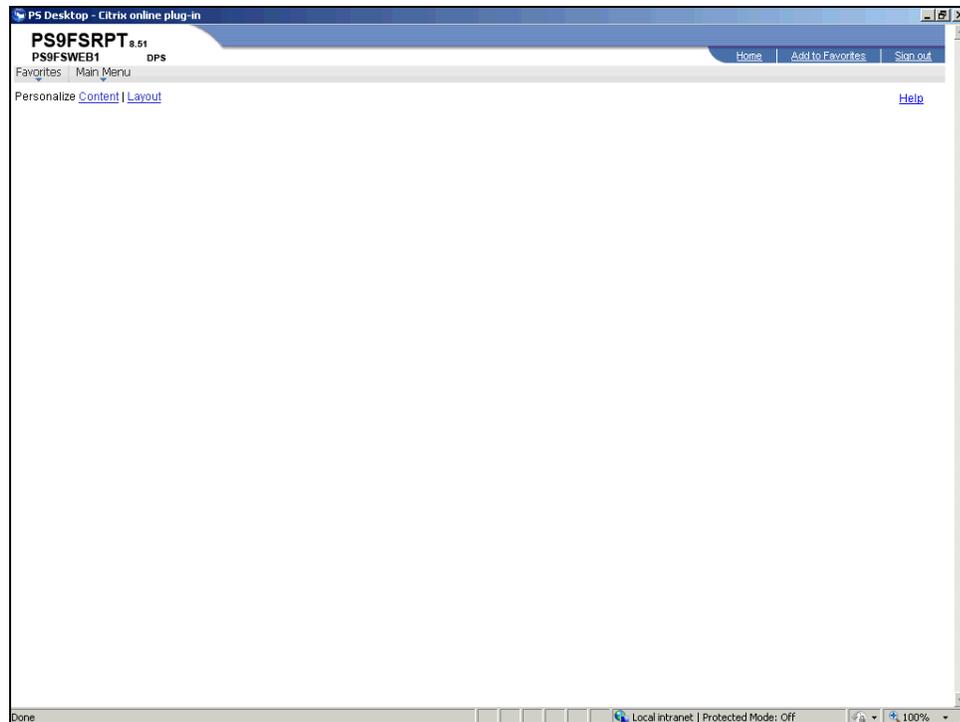
### Schedule A Single Query

#### Procedure

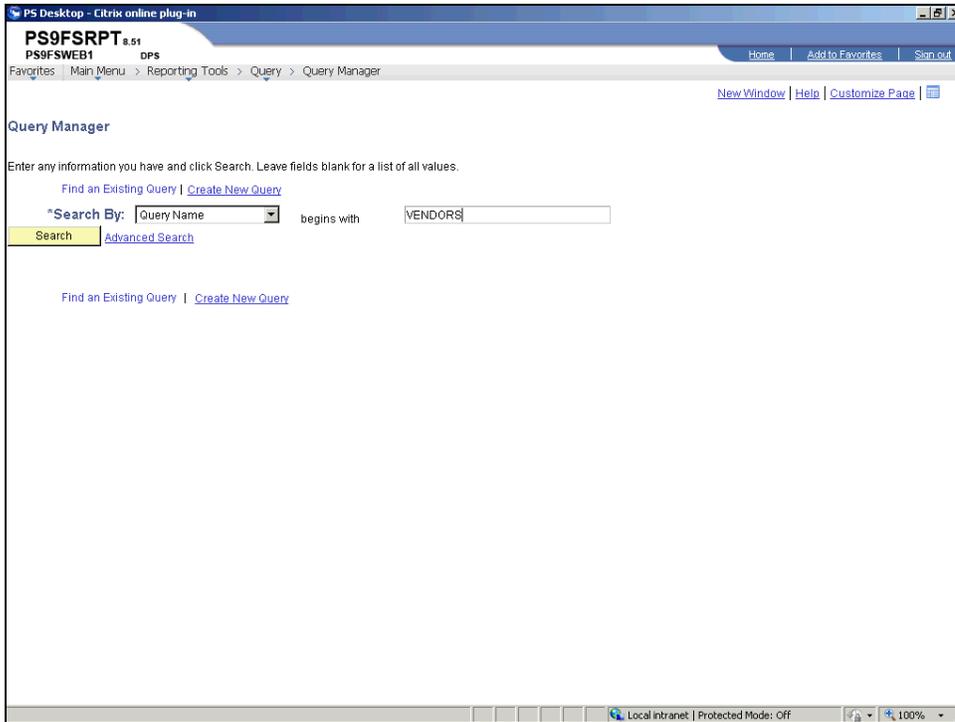
In this topic you will learn how to **Schedule a Single Query**.

*NOTE: This topic demonstrates how to schedule one query at a time for view.*

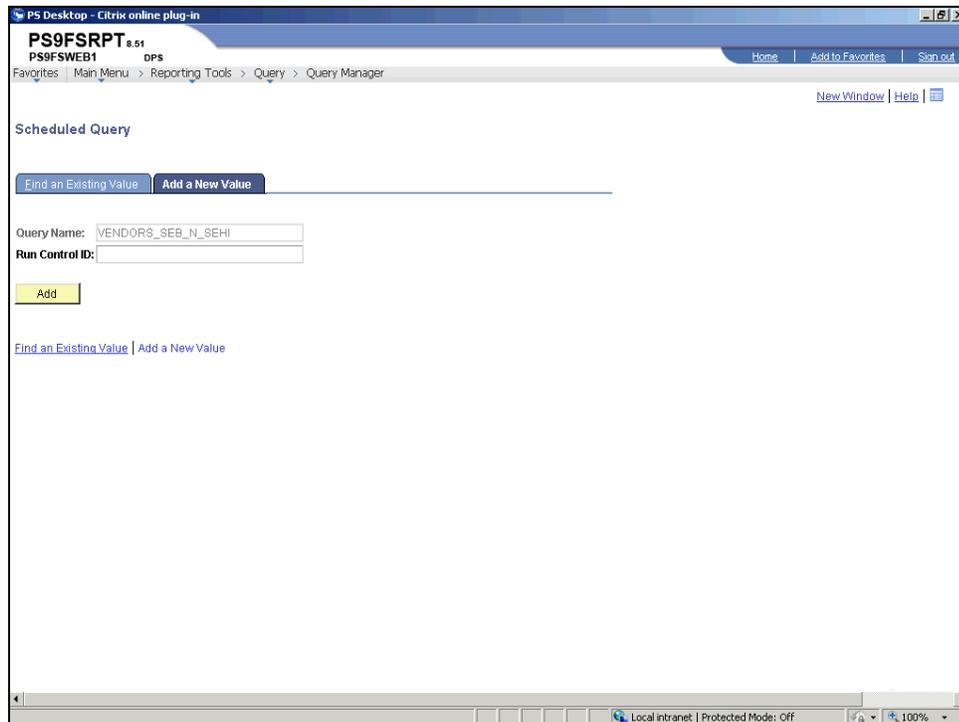
Step	Action
1.	<p>Queries may be scheduled through use of the Report Manager. This is a valuable tool when a query is large and takes a long time to run. Scheduling your query allows you to run the query at a time when there is less activity on the system.</p> <p>In this exercise, you will schedule the VENDORS_SED_N_SEHI query to run in 5 minutes.</p>



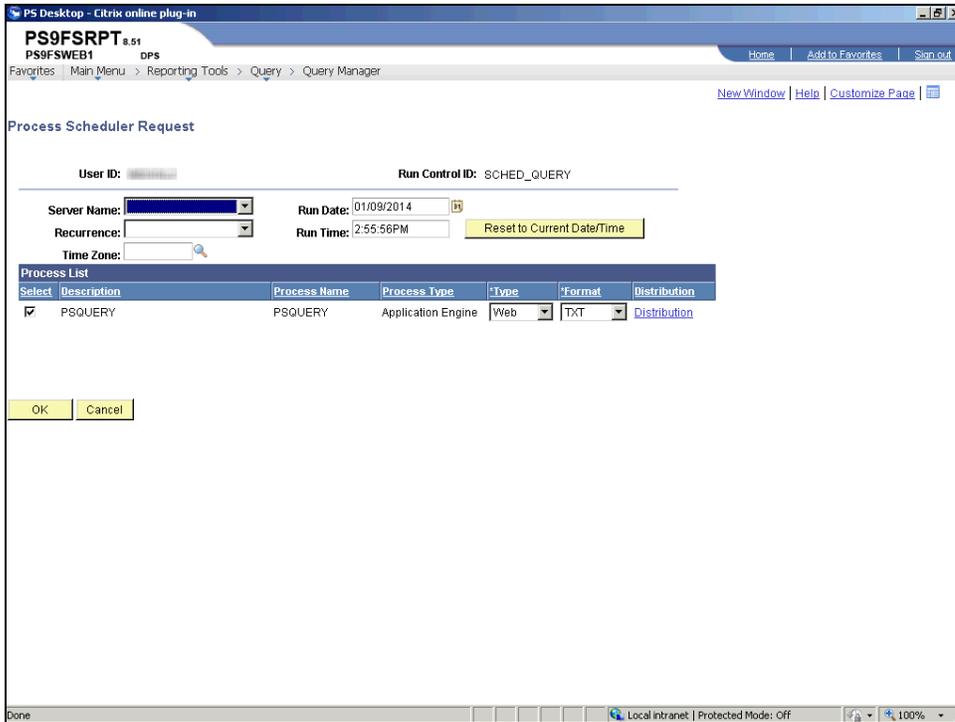
Step	Action
2.	<p>Click the <b>Main Menu</b> button.</p> 
3.	<p>Click the <b>Reporting Tools</b> menu.</p> 
4.	<p>Click the <b>Query</b> menu.</p> 
5.	<p>Click the <b>Query Manager</b> menu.</p> 

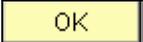


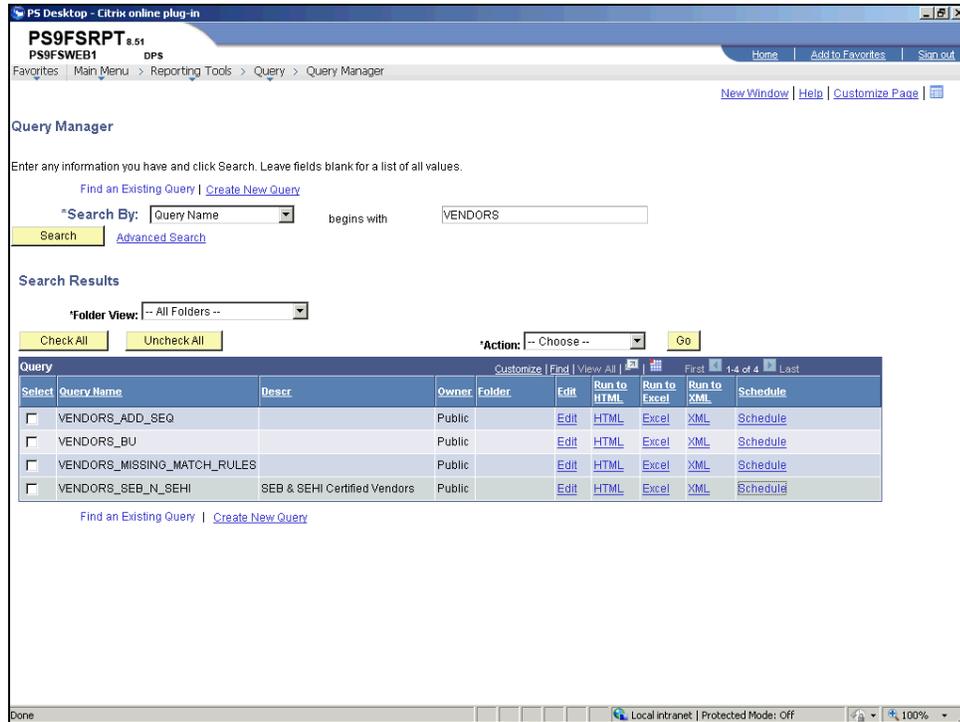
Step	Action
6.	<p>Enter the desired information into the <b>begins with</b> field.</p> <p>Enter <b>VENDORS</b>.</p> <p>Click the <b>Search</b> button.</p> 
7.	<p>Click the <b>Schedule</b> link.</p> 
8.	<p>The system defaults you to the Add a New Value tab. A Run Control ID <b>must</b> be added the first time you run a query.</p> <p>The Run Control ID is used to access the Report Manager. The Run Control ID is:</p> <ol style="list-style-type: none"> <li>1. Specific to the UserID;</li> <li>2. Can be entered in upper, lower or mixed case;</li> <li>3. Can be up to 30 characters long; and</li> <li>4. Must be one continuous string of words. It cannot contain any blank spaces. If you wish to separate two words, connect them using an underscore.</li> </ol>



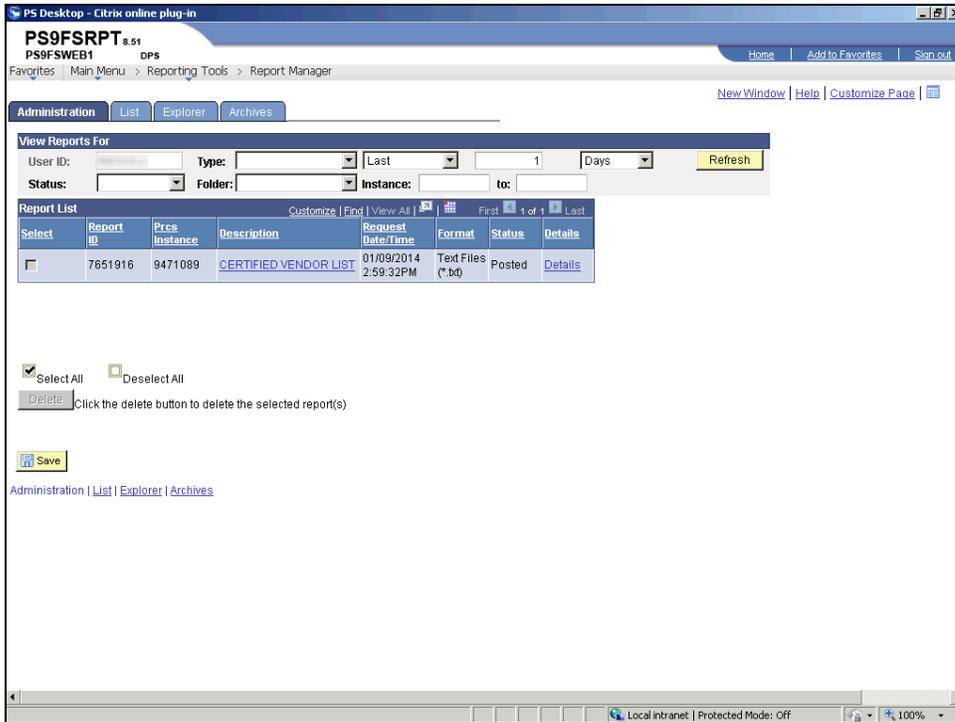
Step	Action
9.	Enter the desired information into the <b>Run Control ID</b> field. Enter " <b>SCHED_QUERY</b> ".
10.	Click the <b>Add</b> button. 
11.	Enter the desired information into the <b>Description</b> field. Enter " <b>VENDOR ADDRESS LIST</b> ".
12.	Click the <b>OK</b> button. 



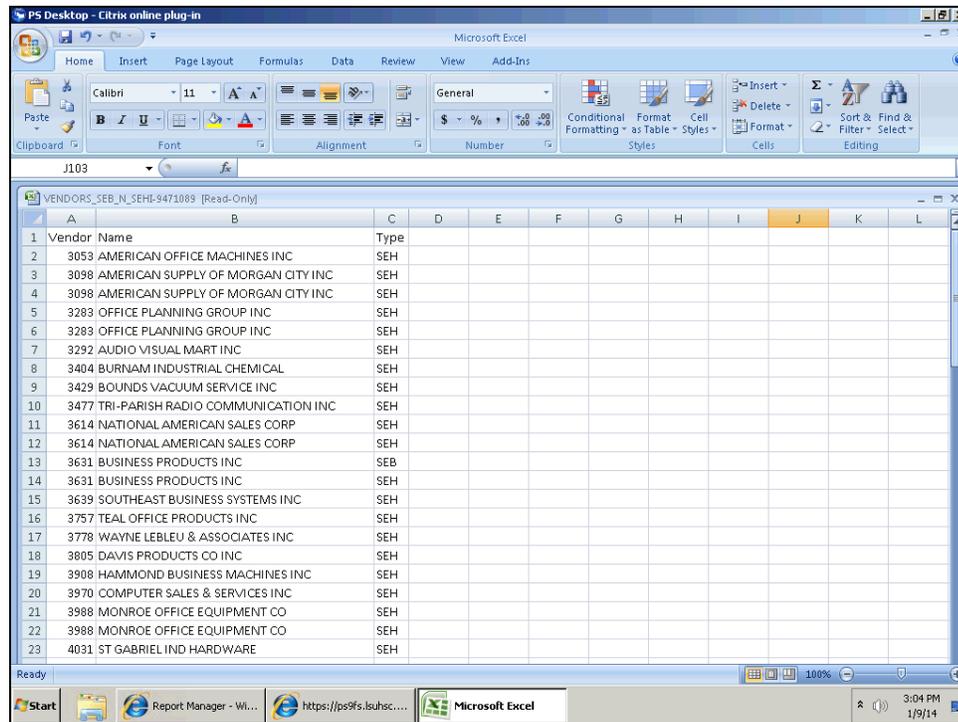
Step	Action
13.	You must select the Server on which the query will run. The Server is always <b>PSNT</b> .  Click the <b>Server Name</b> list. 
14.	Click the <b>PSNT</b> list item. 
15.	You will schedule the query to run 5 minutes from the time displayed in the Run time field. In this example, you will enter 3:00 PM into the Run Time field.  Enter the desired information into the <b>Run Time</b> field. Enter " <b>3:00:56pM</b> ".
16.	Click the <b>OK</b> button. 



Step	Action
17.	<p>Once the scheduled time has elapsed, you can view the query results via the Report Manager.</p> <p>Click the <b>Reporting Tools</b> link at the top of the screen.</p> 
18.	<p>Click the <b>Report Manager</b> menu.</p>  Report Manager



Step	Action
19.	<p>Click the <b>CERTIFIED VENDOR LIST</b> link in the Description column to view the results. This will open a new window.</p> <p><i>NOTE: If multiple process, queries, and/or reports have been run by the user, the most current will display at the top of the list.</i></p> <p><b>CERTIFIED VENDOR LIST</b></p>



Step	Action
20.	Once the results display, you can use any functionality in Excel to manipulate the results.  Click the <b>Close</b> button. 
21.	This completes <b>Schedule Queries</b> . <b>End of Procedure.</b>

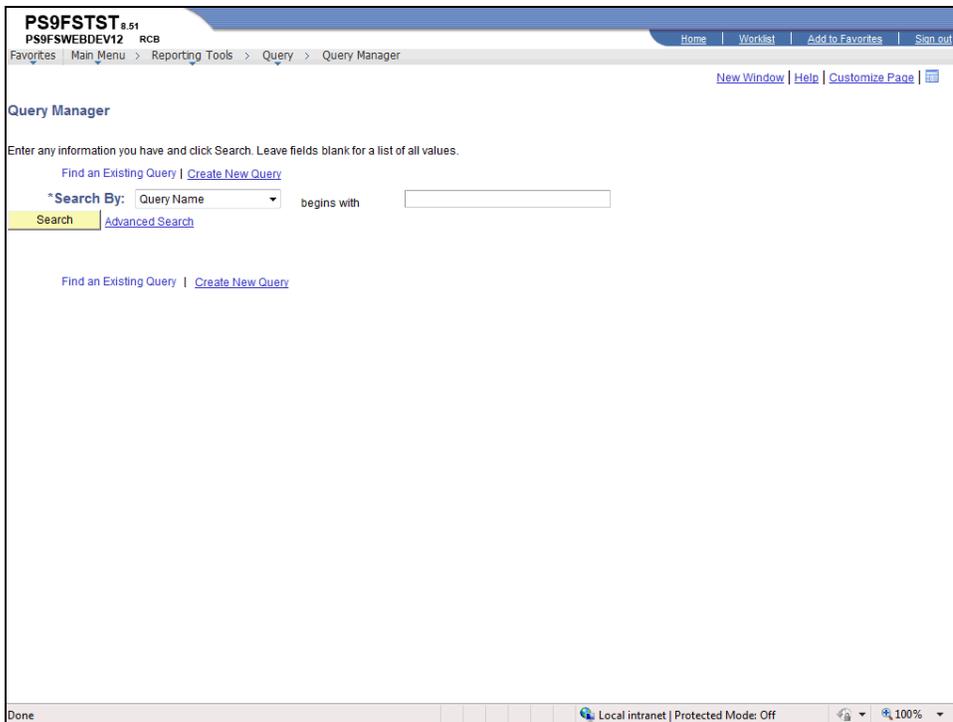
## Appendix

### Copy a Query to Another User

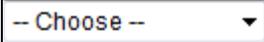
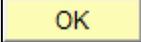
#### Procedure

In this topic you will learn how to **Copy a Query to Another User**.

Step	Action
1.	<p>Security access permitting, users may:</p> <ol style="list-style-type: none"> <li>1. Add a query to Favorites;</li> <li>2. Delete a query;</li> <li>3. Copy a query to another user;</li> <li>4. Move a query to another folder; and/or</li> <li>5. Rename a selected query.</li> </ol> <p><b><i>NOTE: Only Private queries may be Deleted, Copied, Moved, or Renamed. Public queries can also be Added to Favorites.</i></b></p> <p>In this exercise you will copy the AVG_GROSS_VCHR query to another user.</p>



Step	Action
2.	Enter the desired information into the <b>Search By</b> field. Enter "A".
3.	Click the <b>Search</b> button. 
4.	<p>You <b>must</b> select the query you wish to copy. You will check the Select box to the left of the Query Name to select a query.</p> <p>Click the <b>AVG_GROSS_VCHR</b> option.  </p>

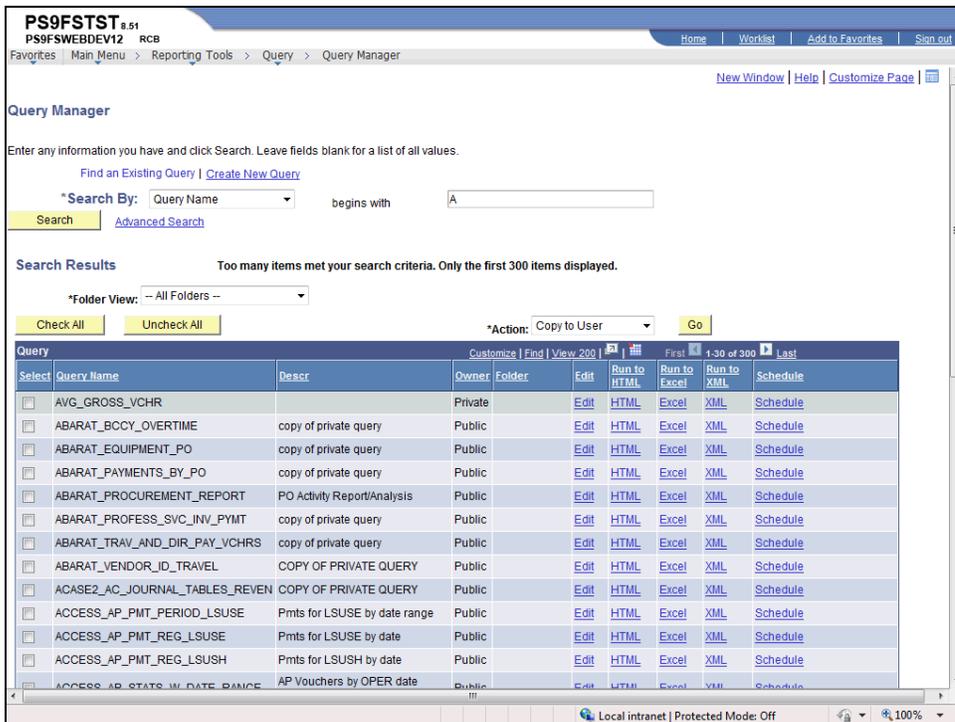
Step	Action
5.	Click the <b>Action</b> list. 
6.	Private queries may be copied to another user and will display at the top of the query search list. Your Private queries will not display in someone else's list.  Click the <b>Copy to User</b> option.
7.	Click the <b>Go</b> button. 
8.	You must enter the UserID ( <b>in uppercase only</b> ) of the person to whom you will copy the query. Enter the desired information into the <b>User ID</b> field. Enter " <b>CHARO1</b> ".
9.	Click the <b>OK</b> button. 
10.	A message will display if the query was successfully copied. A message box will also display if the query does not copy correctly.
11.	This completes <b>Copy a Query to Another User</b> . <b>End of Procedure.</b>

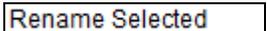
## Rename a Query

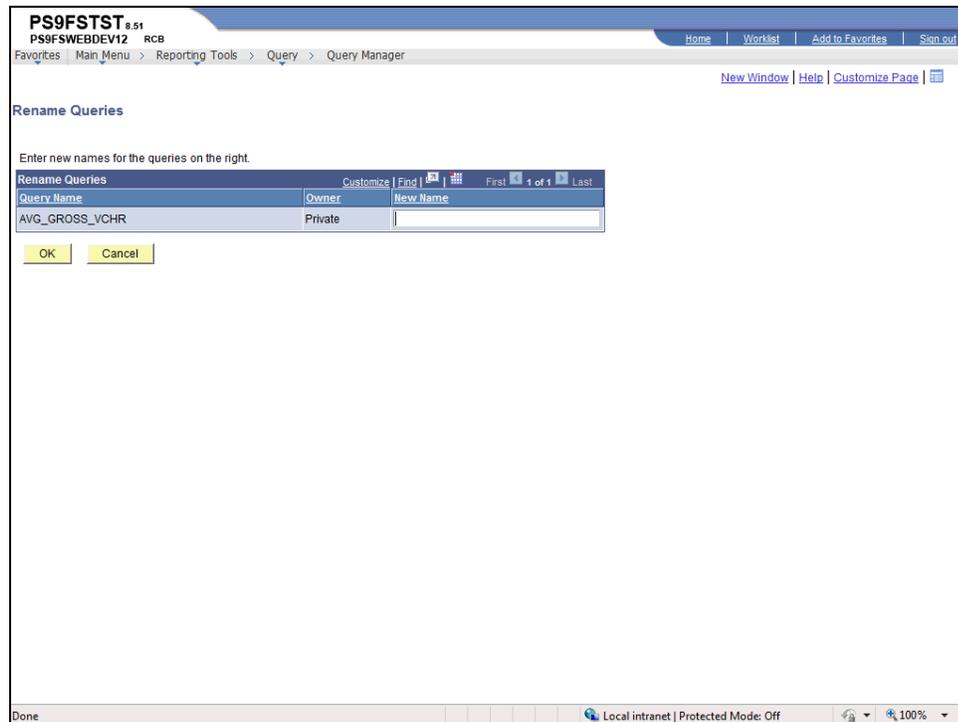
### Procedure

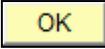
In this topic you will learn how to **Rename a Query**.

Step	Action
1.	If your security access permits, you can rename your Private queries. In this exercise, you will rename the AVG_GROSS_VCHR query.



Step	Action
2.	<p>Select the query you wish to rename by clicking the checkbox to the left of the Query Name.</p> <p>Click the <b>AVG_GROSS_VCHR</b> option.</p> 
3.	<p>Click the <b>Action</b> list.</p> 
4.	<p>Click the <b>Rename Selected</b> option.</p> 
5.	<p>Click the <b>Go</b> button.</p> 



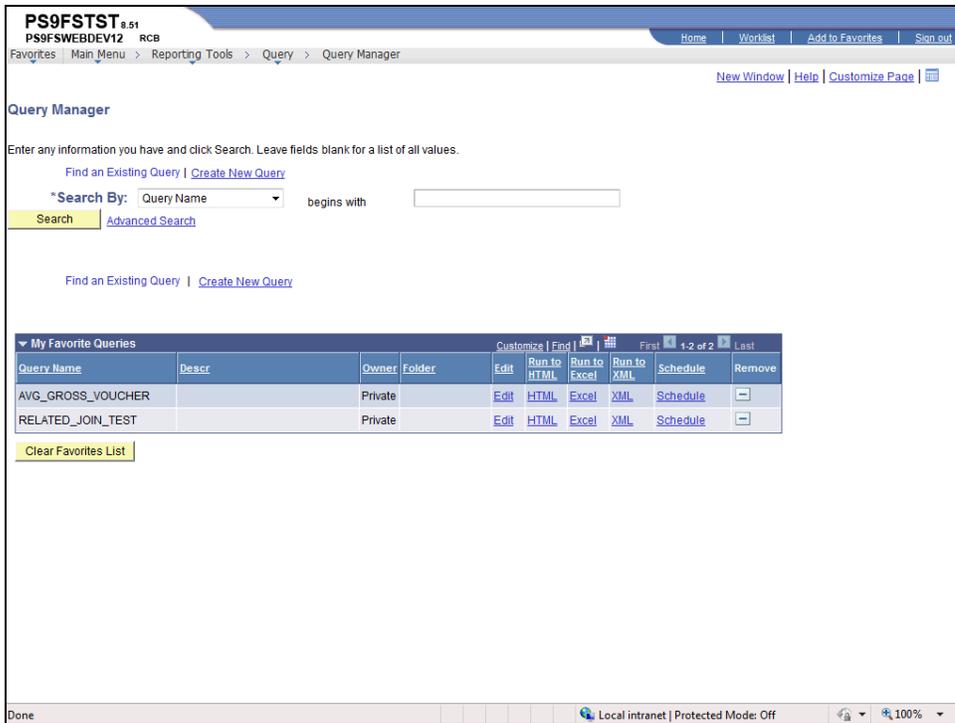
Step	Action
6.	Enter the new name for your Private Query in the New Name field.  Enter the desired information into the <b>New Name</b> field. Enter " <b>AVG_GROSS_VOUCHER</b> ".
7.	Click the <b>OK</b> button. 
8.	On the Query Manager page, you may confirm the query name has changed from AVG_GROSS_VCHR to AVG_GROSS_VOUCHER.
9.	This completes <b>Rename a Query</b> . <b>End of Procedure.</b>

## Clear, Remove and/or Delete a Query

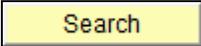
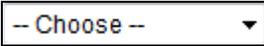
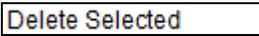
### Procedure

In this topic you will learn how to **Clear, Remove and/or Delete a Query**.

Step	Action
1.	<p>The My Favorite Queries section displays when a query has been added to your favorites. You can remove a single query from the list, or you can clear all queries from the list.</p> <p>Removing or Clearing a query from My Favorite Queries does not delete the query out of the system. It simply removes/clears it from My Favorite Queries. The original query can still be found by using the Search By option on the Query Manager page.</p>
2.	<p>You can clear all queries from My Favorite Queries. You simply click the Clear Favorites List button located under the My Favorite Queries section. This will delete the My favorite Queries section from the page.</p>



Step	Action
3.	<p>You can remove a single query by clicking the Remove (-) button.</p> <p>Click the <b>Remove</b> button.</p> 
4.	<p>The My Favorite Queries section was deleted from the page. Had other queries been saved in My Favorite Queries, removing a single query will not delete the section.</p>

Step	Action
5.	<p>From time to time, you should review your Private queries and delete those queries no longer used from the system. If you do not have the proper security to delete a query, contact your SuperUser for assistance.</p> <p>Enter the desired information into the <b>Search By</b> field. Enter "<b>AVG</b>".</p>
6.	<p>Click the <b>Search</b> button.</p> 
7.	<p>Private queries will display at the top of the search results list.</p> <p>Click the <b>VENDOR_LIST</b> <b>Checkbox</b>.</p> 
8.	<p>Click the <b>Action</b> list.</p> 
9.	<p>Click the <b>Delete Selected</b> option.</p> 
10.	<p>Click the <b>Go</b> button.</p> 
11.	<p>This warning message displays confirming you wish to delete the selected query. Click "<b>Yes</b>" to delete the query and "<b>No</b>" to keep the query.</p> <p><b>Note:</b> The query is then deleted and the screen returns to the Query Manager Search page displaying the results for the previous search.</p>
12.	<p>This completes <b>Clear, Remove and/or Delete a Query</b>. <b>End of Procedure.</b></p>