



# **Financials Query**

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## Financials Query

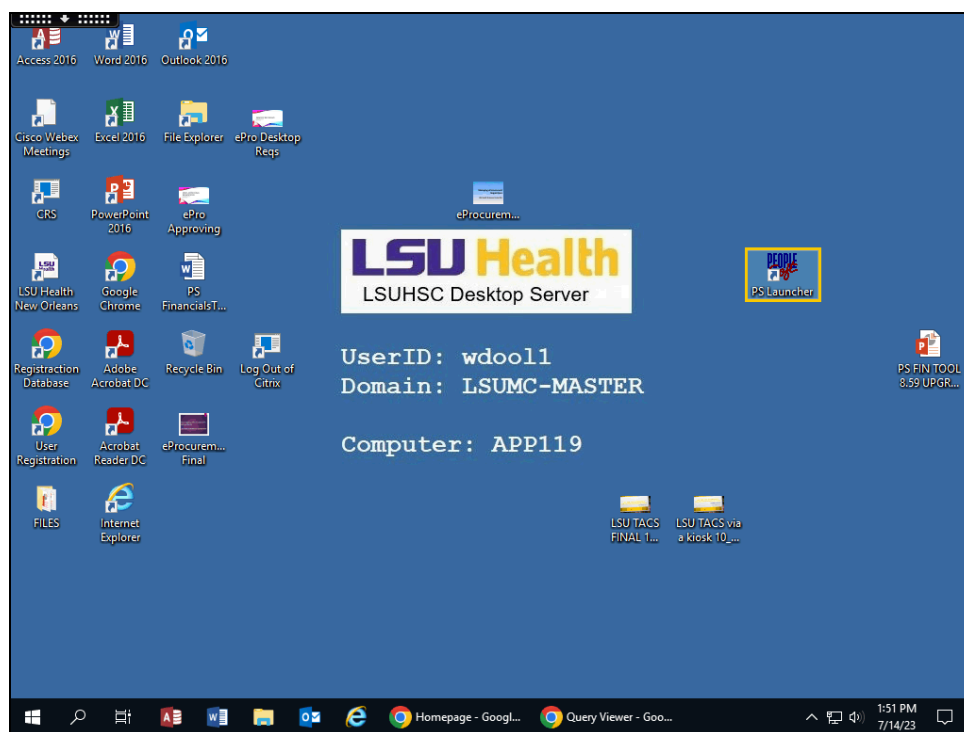
### Introduction to Query



#### Navigate to Query Viewer

##### Procedure

Topic Objectives:

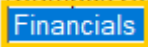



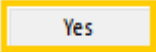





1. Launch PeopleSoft using PS Launcher
2. Select System to use
3. Select Database to use
4. Navigate to Query Viewer via the NavBar and Navigator Menu

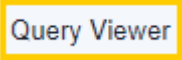


Step	Action
1.	Double-click the <b>PS Launcher</b> button. 
2.	Click the button to the right of the <b>PeopleSoft System</b> field. 

## Training Guide

### Financials Query

Step	Action
3.	Click the <b>Financials</b> list item. 
4.	Click the button to the right of the <b>Database</b> field. 
5.	Click the <b>PS 9.2 Financials Reports (PS9FSRPT)</b> list item. 
6.	Click the <b>Start</b> button. 
7.	Anytime you enter a non-Production database (e.g., <b>RPT</b> , <b>SND</b> , <b>TRN</b> , etc.), a warning message displays reminding you any information entered into the database will be lost.  Click the <b>Yes</b> button. 
8.	Enter the desired information into the field. Enter " <b>UserID</b> ".
9.	Enter the desired information into the <b>Password</b> field. Enter " <b>Password</b> ".
10.	Click the <b>NavBar</b> button. 
11.	Click the <b>Menu</b> button. 
12.	Click the <b>Down</b> scrollbar. 
13.	Click the <b>Reporting Tools</b> button. 
14.	Click the <b>Query</b> button. 

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

# Training Guide

## Financials Query

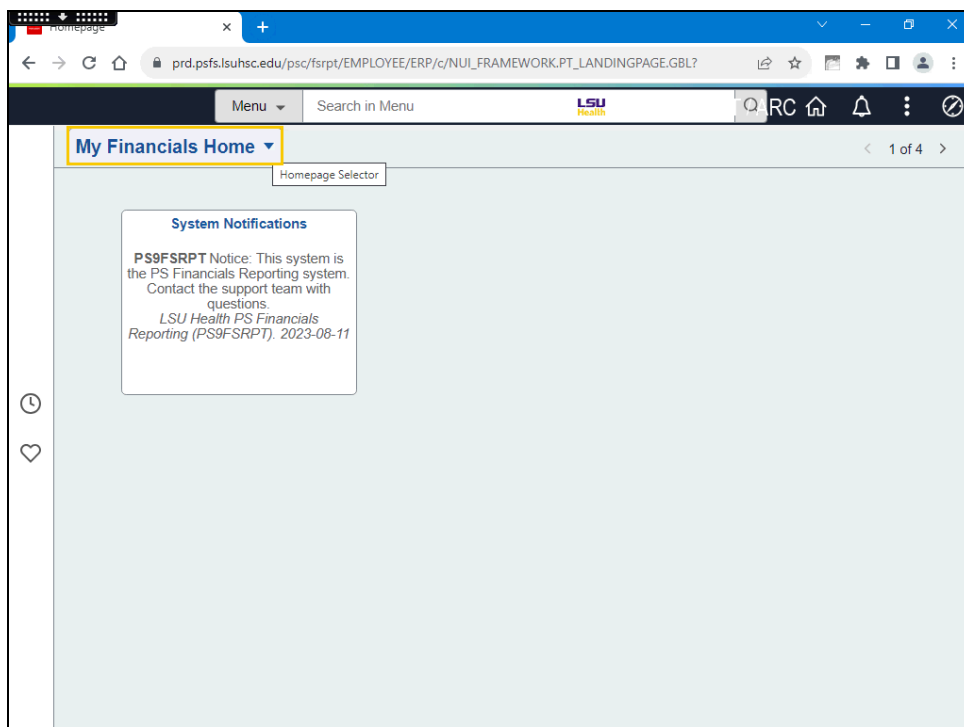
### Alternate Navigation Using LSU Health Reporting Homepage



#### Procedure

#### Topic Objectives:

1. Launch PeopleSoft using PS Launcher
2. Select System to use
3. Select Database to use
4. Navigate to Query Viewer via the **LSU Health Reporting Homepage**

**NOTE: Using the Reporting Home navigation can save a few clicks or keystrokes.**



Step	Action
1.	Click the button to the right of the <b>My Financials Home</b> field. 
2.	Click the <b>LSU Health Reporting</b> list item. 
3.	Click the <b>Query</b> button.
4.	The navigation collection for Query displays on the left of the window, each of the Query menu options to which you have access.

Step	Action
5.	This completes <i>Alternate Navigation Using LSU Health Reporting Homepage.</i> <b>End of Procedure.</b>

# Training Guide

## Financials Query

### Exercise 1

#### Run a Predefined Query to HTML using Query Viewer

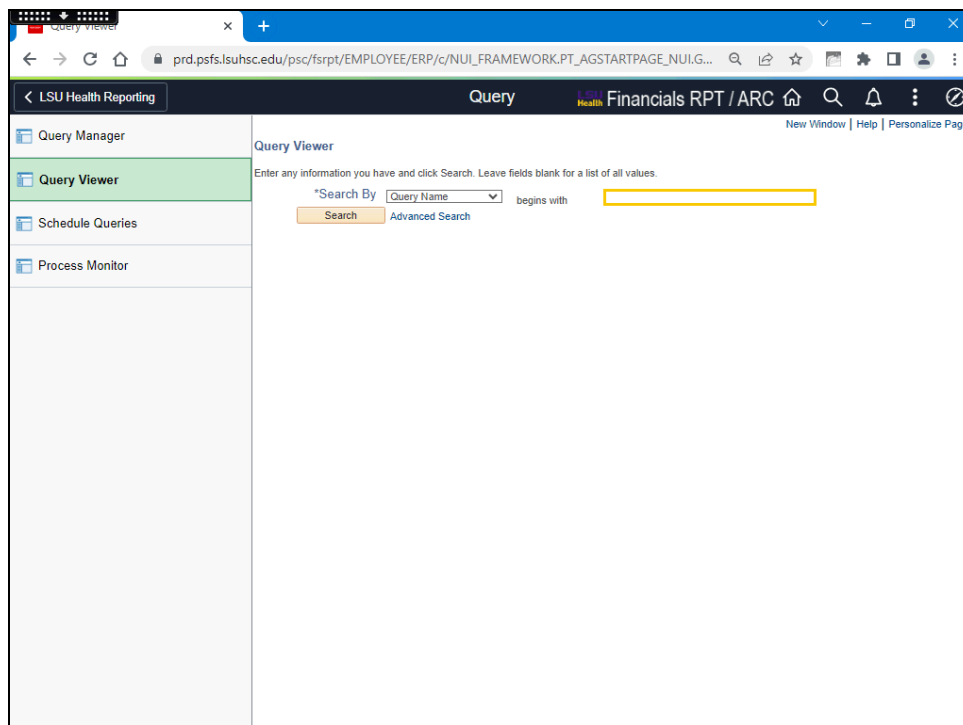
##### Procedure

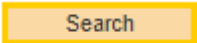


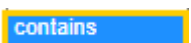
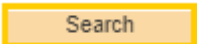
##### Topic Objectives:

1. Search for query using "wildcard"
2. Search for query using Advanced Search "contains" option
3. Run query to HTML
4. Download results to Excel spreadsheet
5. Close the query

Step	Action
1.	<b>Scenario:</b>  In this example, users will run the "APY3001_AP_VENDOR_SUMMARY" query using the HTML format to retrieve a list of approved vendors.
2.	Users can access existing, pre-defined queries (Public and/or Private) from the Query Viewer page. Public queries are available to <u>all</u> 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.
3.	Users must enter all or part of the query name into the Search By field. The Search By field is <b>not</b> case sensitive. Users may enter information in upper, lower or mixed case.
4.	<p>A "wildcard" can be used to focus your search. A <b>"wildcard" is a percent sign</b>. It 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 begin 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 begins with 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 <b>begins with</b> field. Enter " <b>APY%</b> ".
6.	Click the <b>Search</b> button. 
7.	The system retrieves a list of query names that begin with APY. A total of 100 results were retrieved, with the first 30 displaying at the bottom of the page.
8.	The ' <i>begins with</i> ' operand cannot be changed on the Query Viewer page, but can be changed using the <i>Advanced Search</i> link. The <i>Advanced Search</i> link offers an alternative method of retrieving information.  Click the <b>Advanced Search</b> link. 
9.	Click the button to the right of the <b>Query Name</b> field. 
10.	Click the <b>contains</b> list item. 
11.	Enter the desired information into the <b>Query Name</b> field. Enter " <b>APY</b> ".
12.	Click the <b>Search</b> button. 

## Training Guide

### Financials Query

Step	Action
13.	<p>A total of 110 options were returned using the Advanced Search method.</p> <p>Click the <b>View 100</b> link.</p> 
14.	<p>Scroll down through the list of queries to find the <b>APY3001_AP_VENDOR_SUMMARY</b> query.</p> <p>Click the <b>Down</b> button of the scrollbar.</p> 
15.	<p>Query results can be displayed in two formats: HTML and Excel. Both options will be demonstrated in this example, beginning with the HTML option.</p> <p><b>NOTE: Results run 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></p>
16.	<p><b>NOTE: It is recommended that you run your query first to HTML to determine the number of result rows returned. Running your query to HTML will return all available results.</b></p> <p>Click the <b>HTML</b> link.</p> 
17.	Enter the desired information into the <b>SetID</b> field. Enter " <b>SHARE</b> ".
18.	<p>Click the button to the right of the <b>Supplier Status</b> field.</p> 
19.	<p>Click the <b>Approved</b> list item.</p> 
20.	<p><b>NOTE: A list of approved suppliers will be retrieved and displayed below the View Results button.</b></p> <p>Click the <b>View Results</b> button.</p> 
21.	<p>The total number of approved suppliers retrieved displays above the <b>Description</b> column. In this example, 16,121 suppliers were retrieved. The first 100 suppliers are displayed in ascending order by Supplier ID number.</p> <p><b>NOTE: The number of approved suppliers will vary as new suppliers are added or existing suppliers are unapproved or inactivated.</b></p>

Step	Action
22.	The <b>arrows</b> allow you to navigate from page to page. The right arrow allows you to view the next 100 suppliers. The <b>Last</b> link allows you to view the last 100 suppliers. The left arrow allows you the view the previous 100 suppliers, and the <b>First</b> link displays the first 100 suppliers.
23.	The <b>View All</b> link displays all 16,121 suppliers at one time.  <i><b>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.</b></i>
24.	HTML results can be downloaded to an Excel spreadsheet. This will open a new window, and allow you to manipulate the data, move columns, hide columns, etc.  Click the <b>Excel Spreadsheet</b> link. 
25.	You may change the column widths, sort data, add formulas, or utilize 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 Report</b> button. 
26.	<b>CSV</b> is an abbreviation for <b>Comma Separated Value</b> file. This type of file is not generally used by end users, but is available. XML File is not available for general use.  Click the <b>Close</b> button. 
27.	This completes <i><b>Run a Predefined Query to Query Viewer.</b></i> <b>End of Procedure.</b>

# Training Guide

## Financials Query

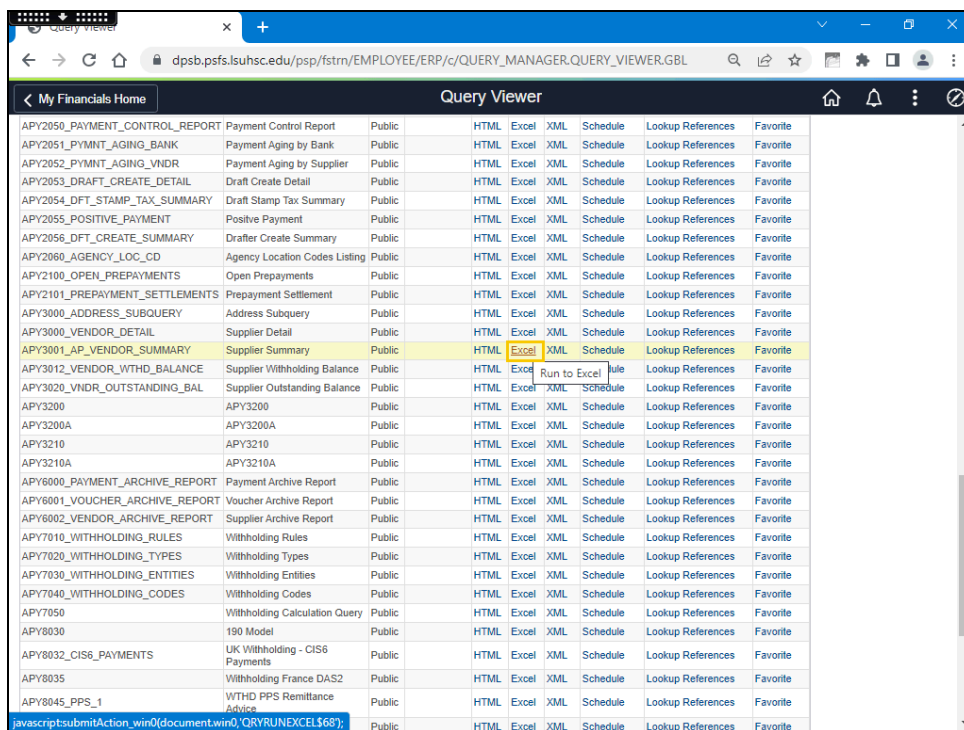
### Exercise 2

#### Run a Predefined Query to Excel using Query Viewer




##### Procedure




##### Topic Objectives:

1. Run query to Excel format
2. Enable Content to allow for data manipulation
3. Close the query



Query ID	Query Name	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY2050_PAYMENT_CONTROL_REPORT	Payment Control Report	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY2051_PYMT_AGING_BANK	Payment Aging by Bank	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY2052_PYMT_AGING_VNDR	Payment Aging by Supplier	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY2053_DRAFT_CREATE_DETAIL	Draft Create Detail	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY2054_DFT_STAMP_TAX_SUMMARY	Draft Stamp Tax Summary	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY2055_POSITIVE_PAYMENT	Positive Payment	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY2056_DFT_CREATE_SUMMARY	Drafter Create Summary	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY2060_AGENCY_LOC_CD	Agency Location Codes Listing	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY2100_OPEN_PREPAYMENTS	Open Prepayments	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY2101_PREPAYMENT_SETTLEMENTS	Prepayment Settlement	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY3000_ADDRESS_SUBQUERY	Address Subquery	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY3000_VENDOR_DETAIL	Supplier Detail	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY3001_AP_VENDOR_SUMMARY	Supplier Summary	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY3012_VENDOR_WITHD_BALANCE	Supplier Withholding Balance	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY3020_VNDR_OUTSTANDING_BAL	Supplier Outstanding Balance	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY3200	APY3200	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY3200A	APY3200A	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY3210	APY3210	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY3210A	APY3210A	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY6000_PAYMENT_ARCHIVE_REPORT	Payment Archive Report	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY6001_VOUCHER_ARCHIVE_REPORT	Voucher Archive Report	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY6002_VENDOR_ARCHIVE_REPORT	Supplier Archive Report	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY7010_WITHHOLDING_RULES	Withholding Rules	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY7020_WITHHOLDING_TYPES	Withholding Types	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY7030_WITHHOLDING_ENTITIES	Withholding Entities	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY7040_WITHHOLDING_CODES	Withholding Codes	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY7050	Withholding Calculation Query	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY8030	190 Model	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY8032_CIS6_PAYMENTS	UK Withholding - CIS6 Payments	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY8035	Withholding France DAS2	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
APY8045_PPS_1	WTHD PPS Remittance Advice	Public	HTML	Excel	XML	Schedule	Lookup References	Favorite
javascript:submitAction_win0(document.win0.QRYRUNEXCEL\$68);								

Step	Action
1.	From the search list results using navigation <i>Reporting Tools&gt;Query&gt;Query Viewer</i> , click the <b>APY3001_AP_VENDOR_SUMMARY</b> <b>Excel</b> link. 
2.	Enter the desired information into the <b>SetID</b> field. Enter " <b>SHARE</b> ".
3.	Click the button to the right of the <b>Supplier Status</b> field. 
4.	Click the <b>Approved</b> list item. 

Step	Action
5.	Click the <b>View Results</b> button. 
6.	You can change column widths, sort data, add formulas, or utilize any other features available in Excel to manipulate your results.
7.	You may save the query results to a network drive for later use, or you may print the results.  Click the <b>Close Report</b> button. 
8.	Click the <b>Close Tab</b> button. 
9.	This completes <i>Run a Predefined Query to Excel</i> . <b>End of Procedure.</b>

# Training Guide

## Financials Query

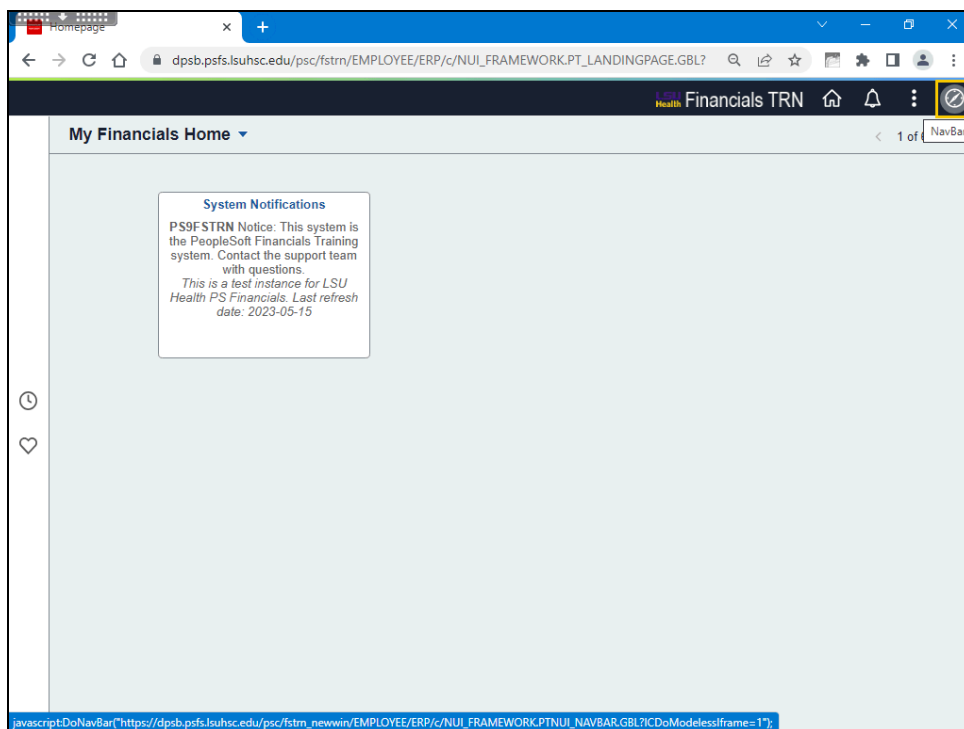
### Exercise 3








#### Create and Format a Query

##### Procedure

##### Topic Objectives:

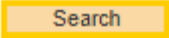

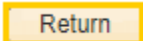


1. Records Tab
  - a. Show Fields
  - b. Select Record
2. Query Tab
  - a. Introduce Criteria
  - b. Introduce Joins
  - c. Key Fields
  - d. Select Fields
3. The Fields Tab
  - a. Reorder Columns
  - b. Change Heading Text
  - c. Sort Data
  - d. Change Translate Value
4. Save Query
5. Run Query
  - a. Download to Excel
  - b. Add to Favorites






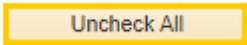

Step	Action
1.	Click the <b>NavBar</b> button. 
2.	Click the <b>Menu</b> button. 
3.	Click the <b>Down</b> button of the scrollbar. 
4.	Click the <b>Reporting Tools</b> link. 
5.	Click the <b>Query</b> link. 
6.	Click the <b>Query Manager</b> link. 
7.	Click the <b>Create a New Query</b> link. 
8.	The <i>Find an Existing Record</i> page displays.  Across the top of the page are nine tabs that can be used in creating or amending a query. The system <i>defaults</i> you onto the <b>Records</b> tab.
9.	PeopleSoft stores the data entered into the system in tables. The tables are comprised of <i>rows (records)</i> and <i>columns (fields)</i> . You will select the various <i>rows (records)</i> and <i>columns (fields)</i> you want the system to retrieve to create your query. When you run your query, 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 supplier names, addresses and current status (e.g. Active or Inactive).

## Training Guide

### Financials Query








Step	Action
10.	<p>You start by selecting a record. Since you are interested in generating a list of vendor information, it makes sense to first determine what vendor tables (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>begins with</b> field. Enter "<b>VEN</b>".</p>
11.	<p>Click the <b>Search</b> button.</p> 
12.	<p>A list of 20 record options displays.</p> <p>If you are unsure of which record to use, you can click a record's <b>Show Fields</b> link to view the fields that comprise the record.</p> <p>Click the <b>Show Fields</b> link.</p> 
13.	<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> <p>Click the <b>Return</b> button.</p> 
14.	<p>For this example, the <b>VENDOR_ADDR - Supplier Address</b> record will be used.</p> <p><i><b>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.</b></i></p> <p>Click the <b>Add Record</b> link.</p> 
15.	<p>In this example, an Effective Date message will display. This occurs anytime an effective dated record is selected. This allows you to modify the date criteria of the record information. In this case, all data will be retrieved with effective dates prior to the current date.</p> <p>Click the desired object.</p> 




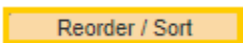


Step	Action
16.	<p>The system takes you to the <b>Query</b> tab.</p> <p>From the <b>Query</b> tab you can select individual fields within a record. The fields you select will display as the columns on your report.</p>
17.	<p>Field names do not default in alphabetical order. The system provides a <i>Sort fields alphabetically</i> option to make searching for fields easier.</p> <p>Click the <b>Sort Fields Alphabetically</b> button.</p> 
18.	<p>The fields display in alphabetical order. By clicking the <i>Sort fields alphabetically</i> button again, the system returns the fields to the original order.</p> <p>Click the <b>Sort Fields Alphabetically</b> button.</p> 
19.	<p>The <b>Check All</b> button is used if you want to use to use all the fields associated with the record in your query.</p> <p>Click the <b>Check All</b> button.</p> 
20.	<p>The <b>Uncheck All</b> button deselects all of the fields associated with the record.</p> <p>Click the <b>Uncheck All</b> button.</p> 
21.	<p>When a field is selected for use in the query, and the query is run, the system returns <b>all</b> the data for the field. You can narrow your results by specifying criteria for the field. The <i>Use as Criteria (funnel)</i> option allows you 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 by using criteria.</p> <p>Click the <b>Use as Criteria</b> button.</p> 

## Training Guide


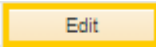


### Financials Query

Step	Action
22.	<p>From the Edit Criteria Properties page, you can Choose Expression, Choose Record or Field, or Define Constant.</p> <p><b>NOTE:</b> See Exercise 4 for information on the Using as Criteria feature.</p> <p>Click the <b>Cancel</b> button.</p> 
23.	<p><b>Joins</b> 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 by LSUHSC in PeopleSoft: <i>Hierarchy Joins</i>, <i>Standard (Any) Joins</i>, and <i>Related Record Joins</i>.</p> <p><b>NOTE:</b> Joins are <u>not</u> used when creating a single record query.</p> <p><b>NOTE:</b> See Exercise 8 - Hierarchy Joins for additional information.</p>
24.	<p><b>Key symbols</b> identify fields found in multiple records. Key fields provide a link when joining multiple records.</p>
25.	<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: <b>Vendor ID</b>, <b>Effective Status</b>, <b>Name1</b>, <b>Address1</b>, <b>City</b>, <b>State</b>, and <b>Postal</b>.</p>
26.	<p>Click the <b>VENDOR_ID - Supplier ID</b> option.</p> 
27.	<p>Click the <b>ADDRESS 1 - Address Line 1</b> option.</p> 
28.	<p>Click the <b>CITY - City</b> option.</p> 
29.	<p>Click the <b>EFF_STATUS - Status as of Effective Date</b> option.</p> 
30.	<p>Click the <b>NAME1 - Supplier Name</b> option.</p> 
31.	<p>Click the <b>Down</b> scrollbar.</p> 

Step	Action
32.	Click the <b>POSTAL - Postal Code</b> option. 
33.	Click the <b>STATE - State</b> option. 
34.	After all fields have been selected, click the Fields tab to view the selected fields collectively.  Click the <b>Fields</b> tab. 
35.	<b>The Fields Tab</b>  Fields display on the Fields tab based on the order they were selected on the Query tab. This will also be the default column order on your spreadsheet. Often fields will need to be <i>reordered</i> to make query results easier to read.  <i><b>NOTE: If the fields on the Query tab were sorted alphabetically and then selected as fields, the selection order on the Fields tab will be alphabetical as well, regardless of the order the fields are selected.</b></i>
36.	<i><b>NOTE: It is recommended the query be saved when any changes are made. The Saved As option will be used when first saving your query so that a name can be assigned.</b></i>  For <b>training purposes only</b> , you will forgo saving the query at this time.
37.	<b>Reorder/Sort</b> allow you to change the order of the fields and, therefore, the order of your spreadsheet columns.  Click the <b>Reorder/Sort</b> button. 
38.	If a field is in the correct position, such as Column 1 <b>VENDOR_ID - Supplier ID</b> , you do not need to enter the "1" in the New Column. Only enter numbers into the New Column for those fields changing positions.  <i><b>In this example, NAME1 is in the third column position. Change NAME1 to column two (2).</b></i>  Enter the desired information into the <b>NAME1 - Supplier Name</b> field. Enter <b>"2"</b> .
39.	<i><b>Change ADDRESS1 to column three (3).</b></i>  Enter the desired information into the <b>ADDRESS1 - Address Line 1</b> field. Enter <b>"3"</b> .

## Training Guide

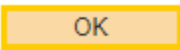
### Financials Query



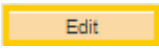

Step	Action
40.	<p>Change <i>CITY</i> to column four (4).</p> <p>Enter the desired information into the <b>CITY - City</b> field. Enter "4".</p>
41.	<p>Change <i>STATE</i> to column five (5).</p> <p>Enter the desired information into the field. Enter "5".</p>
42.	<p>Change <i>POSTAL</i> to column six (6).</p> <p>Enter the desired information into the field. Enter "6".</p>
43.	<p>Change <i>EFF_STATUS</i> to column seven (7).</p> <p>Enter the desired information into the field. Enter "7".</p>
44.	<p>Click the <b>OK</b> button.</p> 
45.	<p>The Fields are reordered based on the changes made on the Reorder/Sort panel.</p> <p>The <i>Heading Text</i> column displays the column title for each field. For example, both the <i>VENDOR_ID</i> and <i>NAME1</i> have the same Heading Text. This could get confusing for someone reading the report. No two columns should have the same Heading Text. Heading Text can be changed using the Edit feature.</p> <p>Click the <b>Edit - Vendor ID - Supplier ID Edit</b> button.</p> 
46.	<p>The <b>Heading</b> section displays the selected column title. There are four (4) Heading options from which to choose:</p> <ol style="list-style-type: none"> <li><b>No Heading</b> - column title will be blank</li> <li><b>RFT Short</b> - column title will display up to 10 characters</li> <li><b>RFT Long</b> - column title will display up to 30 characters</li> <li><b>Text</b> - column title will display as entered into the Heading Text field.</li> </ol>
47.	<p>Currently, the Heading for <i>VENDOR_ID</i> is set to RFT Short, where Heading Text = Supplier. Change the Heading from <i>RFT Short</i> to <i>RFT Long</i> so that the <b>Heading Text = Supplier ID</b>.</p> <p><b>NOTE: The Unique Field Name will always remain as defaulted.</b></p> <p>Click the <b>RFT Long</b> option.</p> 
48.	<p>Click the <b>OK</b> button.</p> 
49.	<p>The Heading Text for the <i>VENDOR_ID</i> field has changed from Supplier to Supplier ID.</p>

Step	Action
50.	Click the <b>NAME1 - Supplier Name Edit</b> button. 
51.	Click the <b>Text</b> option. 
52.	Enter the desired information into the <b>Heading Text</b> field. Enter " <b>Supplier Name</b> ".
53.	Click the <b>OK</b> button. 
54.	Click the <b>ADDRESS 1 - Address Line 1 Edit</b> button. 
55.	Click the <b>Text</b> option. 
56.	Enter the desired information into the <b>Heading Text</b> field. Enter " <b>Address</b> ".
57.	Click the <b>OK</b> button. 
58.	Click the <b>STATE - State Edit</b> button. 
59.	Click the <b>RFT Long</b> option. 
60.	Click the <b>OK</b> button. 
61.	Click the <b>Save As</b> link. 

## Training Guide

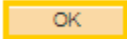



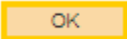

### Financials Query

Step	Action
62.	<p>When you save the query the first time, you will name your query. Any queries you create <b>must</b> be saved as a Private query. If you modify a Public query, and wish to save the changes, you <b>must</b> save the query as a Private query.</p> <p>The query naming convention is provided below.</p> <ol style="list-style-type: none"> <li>1. Name must be in <b>ALL CAPS</b></li> <li>2. Can be up to thirty (30) characters long</li> <li>3. Can use either letters or numbers</li> <li>4. <u>Cannot</u> contain any blank spaces</li> <li>5. <u>Cannot</u> contain any special characters (e.g., #, \$, %, &amp;, etc.)</li> <li>6. Can use an underscore to separate words</li> <li>7. Recommended best practice is to start the query name with your initials).</li> <li>8. For public queries, the enterprise prefers <b>LSUHSC_</b>, <b>LSUNO_</b>, <b>LSUSH_</b>, <b>HCSDA_</b>, <b>LAKMC_</b> or <b>ZZ_</b> as the starting letters of the name.</li> </ol>
63.	<p><b>Query</b> names <b>must</b> be entered in ALL CAPS. Names can be up to thirty (30) characters long. No spaces or special characters (e.g., #, \$, &amp;, etc.) 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>SUPPLIER_LIST</b>".</p>
64.	<p>A <b>Description</b> may be added. The <b>Description</b> can be up to thirty (30) characters long and is not case sensitive.</p> <p>Enter an appropriate description of the query that can help you identify it later. The Description should work in conjunction with the query name to identify the query's purpose and use.</p> <p>Enter the desired information into the <b>Description</b> field. Enter "<b>SUPPLIER ADDRESS LIST</b>".</p>
65.	<p>The <b>Folder</b> field is <u>not</u> used.</p> <p>The <b>Query Type</b> is <u>always</u> <i>User</i>.</p> <p>The <b>Owner</b> is <u>always</u> <i>Private</i>.</p>
66.	<p>The use of the <b>Query Definition</b> box is <i>optional but recommended</i>. Here the user can write a longer description of the query purpose and use. Users are also encouraged to <i>enter the date</i> the query is <i>created</i>.</p> <p>Enter the desired information into the <b>Query Definition</b> field. Enter "<b>DATE CREATED</b>".</p>
67.	<p>Click the <b>OK</b> button.</p> 

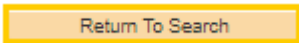
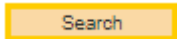





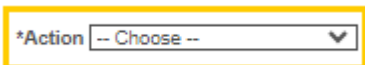
Step	Action
68.	<p>The <b>Run</b> tab allows you to preview your query results while continuing to build your query.</p> <p>Click the <b>Run</b> tab.</p> 
69.	<p>Query results display in HTML format. Data <b>cannot</b> be manipulated in HTML, but a link to download your results to Excel is provided on the page. Once your results are downloaded to Excel, you will be able to filter data, group data, perform calculations, etc.</p> <p>The first 100 options display in your query results window. You can use the arrows to move between pages, or use the First or Last link to view results.</p>
70.	<p>Notice only a single character displays in the Effective Status column for each supplier. This character is known as a Translate Code. This code stands in place for the actual Translate Value, which in this case A = Active and I = Inactive.</p> <p>Click the <b>Fields</b> tab.</p> 
71.	<p>Translate Codes are found when a Translate table is being used in query. The Translate table provides a corresponding set of values to a set of codes, such as A = Active and I = Inactive. If a field has values on the Translate table, a letter (<i>i.e.</i>, N, S, L) appears in the <b>XLAT</b> column for that field. In this example, the <i>EFF_STATUS</i> field displays an "N" in the XLAT column, thus indicating a Translate Code is in use for this field.</p>
72.	<p>Letter designations in the <b>XLAT</b> column will be "N, S, and L."</p> <p><b>N (None)</b> - Displays in the query results as a <i>single character</i> value and assumes a current date logic (<i>i.e.</i>, Effective Date = Current Date)</p> <p><b>S (Short)</b> - Displays in query results as a <i>10-character value</i> and uses a specific Effective Date logic (<i>i.e.</i>, Effective Date &lt;= Current Date)</p> <p><b>L (Long)</b> - Displays in query results as a <i>30-character value</i> and uses a specified Effective Date (<i>i.e.</i>, Effective Date &lt;= Current Date)</p>
73.	<p>The letter designation in the XLAT column can be changed on the field's <i>Edit Field Properties</i> panel.</p> <p>Click the <b>EFF_STATUS - Status as of Effective Date Edit</b> button.</p> 
74.	<p>Click the <b>Long</b> option.</p> 

## Training Guide

### Financials Query


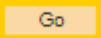
Step	Action
75.	Click the <b>OK</b> button. 
76.	Notice the letter designation in the XLAT column has change from "N" to "L."
77.	Notice the letter designation in the XLAT column has change from "N" to "L."  Click the <b>Run</b> tab. 
78.	The status for each Supplier now displays as 'Active or Inactive'.  The value in the <b>Effective Status</b> column is now <i>Active or Inactive</i> rather than a single character.  Click the <b>Fields</b> tab. 
79.	Query output rows are sorted in <i>ascending order</i> - all <i>Active</i> suppliers will list first - based on the values displayed in the first column. In this example, output data will be sorted by <b>VENDOR_ID</b> . You may <i>change</i> the sort order of your output results using the <i>Reorder/Sort</i> option.  Click the <b>Reorder/Sort</b> button. 
80.	The right side of the <i>Edit Field Ordering</i> panel is used for sorting output data. Numeric values are entered to designate sort order. Leave blank any fields you do not to include sort ordering.  Query also provides an option to allow you to sort in <i>descending order</i> by clicking the checkbox to the left of the <b>New Order By</b> column.
81.	In this example you will sort data as follows: <b>1. EFF_STATUS</b> <b>2. Descending order</b>  Enter the desired information into the <b>EFF_STATUS - Status as of Effective Date New Order By</b> field. Enter " <b>1</b> ".
82.	Click the <b>OK</b> button. 
83.	The <b>Ord</b> column now displays a '1' for the <b>EFF_STATUS</b> field.  Your query results will now sort by whether the supplier is Active or Inactive.
84.	Click the <b>Save</b> button. 



Step	Action
85.	Click the <b>Return to Search</b> button. 
86.	Enter the desired information into the <b>begins with</b> field. Enter " <b>SUPPLIER</b> ".
87.	Click the <b>Search</b> button. 
88.	You want to change column widths, sort data, add formulas, or utilize other features in Excel to manipulate your results.  You may save the query results to a network drive for later use, or you may print the results.  Click the <b>SUPPLIER_LIST HTML</b> link. 
89.	Your query output displays, but further manipulation of the spreadsheet cannot be done in HTML format. A link is provided to download your results to an Excel spreadsheet so that you may add formulas, sort data, change column widths, etc.  Click the <b>Excel Spreadsheet</b> link. 
90.	You may save your query to a network drive for later use, or you may print the results using the <b>File</b> option on your toolbar.  Click the <b>Close Report</b> button. 
91.	Click the <b>Close Tab</b> button. 
92.	You may add a query to <b>My Favorite Queries</b> for ease of access in the future. Use the <b>Actions</b> feature, <b>Add to Favorites</b> option to add a query to <i>My Favorite Queries</i> .  Click the <b>SUPPLIER_LIST</b> option. 
93.	Click the button to the right of the <b>Action</b> field. 

## Training Guide

### Financials Query

Step	Action
94.	<p><b>NOTE:</b> <i>Your security permission will determine the options available in the Actions list.</i></p> <p>Click the <b>Add to Favorites</b> list item.</p> 
95.	<p>Click the <b>Go</b> button.</p> 
96.	<p>The <b>My Favorite Queries</b> box displays at the bottom of the page. <i>My Favorite Queries</i> will automatically appear on the <b>Query Manager/Viewer</b> page the next time the user enters query.</p>
97.	<p>This complete <i>Create and Format a Query</i>.</p> <p><b>End of Procedure.</b></p>

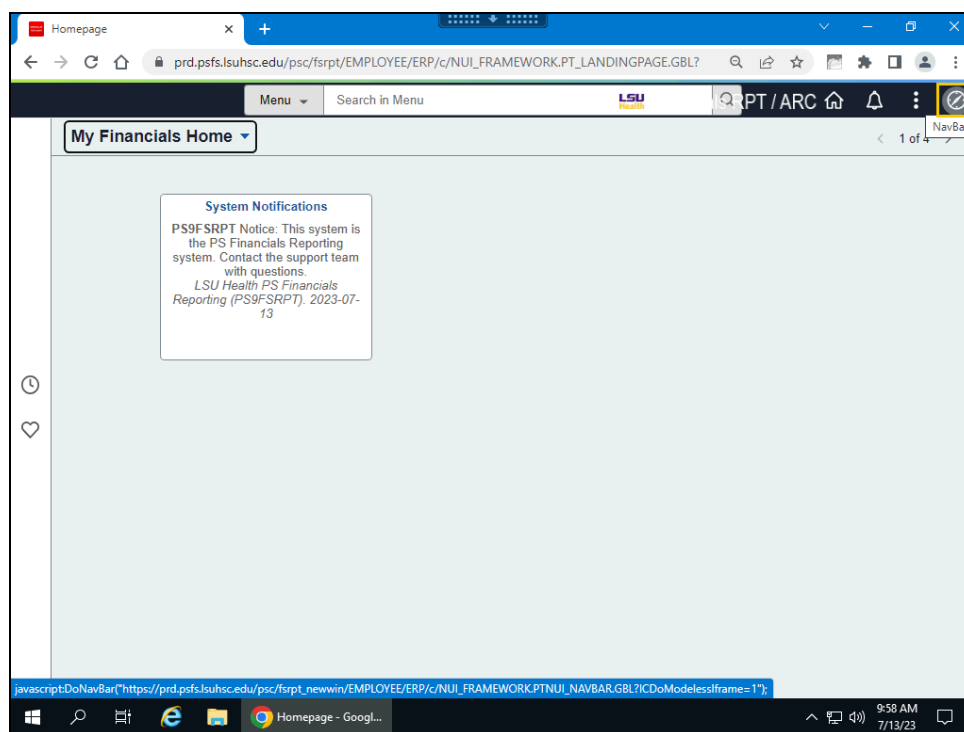
## Exercise 4


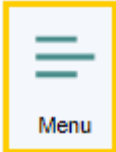
### Create a Query using Criteria Components

#### Procedure

#### Topic Objectives:



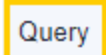
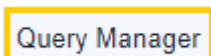

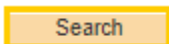
1. Add Criteria using three methods:
  - a. Add criteria from the **Fields** tab using Condition Type "**equal to**"
  - b. Add criteria from the **Criteria** tab using Condition Type "**between**"
  - c. Add criteria from the **Query** tab using Condition Type "**in list**"

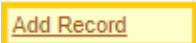










Step	Action
1.	Click the <b>NavBar</b> button. 
2.	Click the <b>Menu</b> link. 

## Training Guide

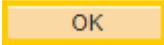

### Financials Query


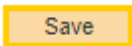
Step	Action
3.	Click the <b>Down</b> button of the scrollbar. 
4.	Click the <b>Reporting Tools</b> link. 
5.	Click the <b>Query</b> link. 
6.	Click the <b>Query Manager</b> link. 
7.	Click the <b>Create New Query</b> link. 
8.	Defining criteria allows you to: <ul style="list-style-type: none"> <li>1. Reduce the number of data rows returned in your results, and</li> <li>2. Retrieve only the data you need at the time the query runs.</li> </ul>
9.	<p><b>Scenario</b></p> <p>In this exercise, users will create a query to generate a voucher list using the <b>VOUCHER - AP Voucher Header Table</b> record. Criteria will be utilized to develop the query and will be added from: the <i>Fields</i> tab to specify the <i>BUSINESS_UNIT</i> as <i>LSUSH</i>; the <i>Criteria</i> tab to specify the <i>INVOICE_DT</i> range as <i>01/01/22 through 01/10/22</i>; and the <i>Query</i> tab where the <i>POST_STATUS_AP</i> will be "in list" as "P" and "U".</p> <p>The following <b>fields</b> will be selected from the <b>VOUCHER - AP Voucher Header Table</b> record:</p> <ul style="list-style-type: none"> <li>1. BUSINESS_UNIT - Business Unit</li> <li>2. VOUCHER_ID - Voucher ID</li> <li>3. INVOICE_DT - Invoice Date</li> <li>4. OPERID - User ID</li> <li>5. POST_STATUS_AP - Post Status</li> <li>6. GROSS_AMT - Gross Invoice Amount</li> </ul> <p><b>NOTE:</b> <i>New Orleans users will see the LSUNO Business Unit when running this exercise in RPT or SND. However, if you are using the WBT, the LSUSH Business Unit <u>must</u> be used.</i></p>
10.	Enter the desired information into the <b>begins with</b> field. Enter " <b>VOUCHER</b> ".
11.	Click the <b>Search</b> button. 

Step	Action
12.	Click the <b>Add Record</b> link. 
13.	Click the <b>BUSINESS_UNIT - Business Unit</b> option. 
14.	Click the <b>VOUCHER_ID - Voucher ID</b> option. 
15.	Click the <b>INVOICE_DT - Invoice Date</b> option. 
16.	Click the <b>OPRID - User ID</b> option. 
17.	Click the <b>POST_STATUS_AP - Post Status</b> option. 
18.	Click the <b>GROSS_AMT - Gross Invoice Amount</b> option. 
19.	Click the <b>Fields</b> tab. 
20.	<i><b>NOTE: Fields can be deleted on the Fields tab by clicking the Delete (-) button for a specific field. Fields <u>cannot</u>, however, be <u>added</u> on the Fields tab.</b></i>
21.	<i><b>NOTE: You will name the query the first time you save it using the Save As option. The query <u>must</u> be saved as a Private query. If a Public query is to be modified, you <u>must</u> first save it as a Private query.</b></i>  Click the <b>Save As</b> link. 
22.	Enter the desired information into the <b>Query</b> field. Enter " <b>AVG_GROSS_VCHR</b> ".
23.	The <b>Description</b> can be up to thirty (30) characters long and should define the purpose of the query.  Enter the desired information into the <b>Description</b> field. Enter " <b>AVERAGE GROSS VOUCHER</b> ".

## Training Guide

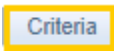




### Financials Query

Step	Action
24.	<p>The <b>Folder</b> field will remain empty.</p> <p>The <b>Query Type</b> = <b>User</b>.</p> <p>The <b>Owner</b> = <b>Private</b>.</p>
25.	<p>The <b>Query Definition</b> field is a free form text box where additional information regarding the query can be entered. It is recommended you enter the <b>date</b> and <b>why</b> the query was created. This is to help you later determine if the query is still needed or can be deleted from the database.</p> <p>Enter the desired information into the <b>Query Definition</b> field. Enter "<b>DATE CREATED</b>".</p>
26.	<p>Click the <b>OK</b> button.</p> 
27.	The <b>Query Name</b> and <b>Description</b> display at the top of the page.
28.	<p>You add criteria to a query to filter and/or limit the results based on specified conditions the data must meet. There are three (3) methods for adding criteria to a query. Each will be demonstrated in this topic. The methods are:</p> <p><b>Method 1</b> - Add criteria from the <b>Fields</b> tab using Condition Type "equal to".</p> <p><b>Method 2</b> - Add criteria from the <b>Criteria</b> tab using Condition Type "between".</p> <p><b>Method 3</b> - Add criteria from the <b>Query</b> tab using Condition Type "in list".</p>
29.	<p><b>Method 1 - Add criteria from the Fields tab using "equal to"</b></p> <p>In this example, you will enter a specific Business Unit value as criteria to filter query results. <b>Business Unit</b> = <b>LSUSH</b>.</p> <p>Click the <b>BUSINESS_UNIT - Business Unit Add Criteria</b> button.</p> 
30.	<p><b>Choose Expression 1 Type</b></p> <p><b>Field</b> - Users are comparing to a field within the records selected for this query</p> <p><b>Expression</b> - You are comparing to an expression you create. Query will evaluate each row with the expression created</p>
31.	By selecting the Add Criteria button for the <i>BUSINESS_UNIT</i> field on the <i>Fields</i> tab, the <i>field name</i> defaults into the <b>Expression 1 Record Alias.FieldName</b> .

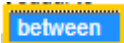
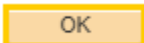
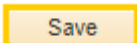
Step	Action
32.	<p>The <b>Condition Type</b> determines how a query <i>compares values</i> specified in <i>Expression 1</i> and <i>Expression 2</i> (e.g., BUSINESS_UNIT is equal to LSUSH). The most commonly used Condition Types at <i>LSU Health</i> are:</p> <ol style="list-style-type: none"> <li>1. <b>Equal To</b> - finds the rows of data having a value that matches the constant specified in Expression 2</li> <li>2. <b>In List</b> - finds fields having a value that match any one of the values in a list of values</li> <li>3. <b>Between</b> - selects fields containing a value that is between two specified values</li> </ol>
33.	<p>The <b>Choose Expression 2 Type</b> is what <i>Expression 1 Type</i> will be compared to:</p> <p><b>Field:</b> You are comparing to a field selected for this query;</p> <p><b>Expression:</b> You are comparing to an expression you create. Query will evaluate each row with the expression created;</p> <p><b>Constant:</b> You are comparing to a single, fixed value;</p> <p><b>Prompt:</b> You are comparing to a prompt which requires the user to enter value(s) at the time the query is executed.</p>
34.	<p>In this example, the <i>Choose Expression 2 Type</i> is a "Constant". A single Business Unit will be specified in the <b>Expression 2 Define Constant</b> field. The system will retrieve data for the specified Business Unit only. You may search for the Business Unit using the <b>Select Constant From List</b> (magnifying glass to the right of the field).</p>
35.	<p>Changes can be made to any of the components of the <b>Edit Criteria Properties</b> panel. For this example, the <i>Choose Expression 1 Type</i>, the <i>Record Alias.FieldName</i>, the <i>Expression 1 Condition Type</i>, and the <i>Choose Expression 2 Type</i> will remain as defaulted.</p>
36.	<p><b>NOTE: New Orleans users will use the LSUNO Business Unit when running this example in RPT or SND. However, if you are using the WBT, the LSUSH Business Unit must be used.</b></p> <p>Enter the desired information into the <b>Constant</b> field. Enter "<b>LSUSH</b>".</p>
37.	<p>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 LSUSH. In other words, only AP voucher data for LSUSH will be retrieved.</p> <p>Click the <b>OK</b> button.</p> 
38.	<p>Click the <b>Save</b> button.</p> 

## Training Guide

### Financials Query

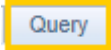



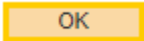
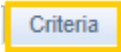
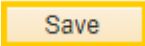
Step	Action
39.	<p><b>Method 1 Summary:</b></p> <ol style="list-style-type: none"> <li>1. The Business Unit Add Criteria button was selected on the Fields tab;</li> <li>2. A constant Business Unit value (LSUSH) was specified on the Edit Criteria Properties panel; and</li> <li>3. The system will retrieve AP voucher data for LSUSH only.</li> </ol> <p><i>This completes the discussion of Method 1 - Add criteria from the Fields tab.</i></p>
40.	<p><b>Method 2 - Add criteria from the Criteria tab</b></p> <p>In this example, you will specify a <i>date range</i> for the <i>INVOICE_DT - Invoice Date</i>. The specified date range will be 01/01/22 - 01/31/22.</p> <p>Click the <b>Criteria</b> tab.</p> 
41.	<p>As criterion are added to the query, they are listed on the <b>Criteria</b> tab.</p> <p><i>The system filters data on the 'Logical' order of added criteria. The Logical represents how criteria compare to each other.</i></p> <p>If only one criteria are added, the <i>Logical</i> field will either be <i>blank</i>, or the option "NOT" may be selected. In this example, the field is left blank, so data will be retrieved for LSUSH only. If the "NOT" logical was used, the system would retrieve all Business Units <i>except</i> LSUSH.</p> <p>Click the <b>Add Criteria</b> button.</p> 
42.	<p>When you selected the Business Unit Add Criteria button on the Fields tab, the Record Alias.Fieldname defaulted into Expression 1. <i>However, the Record Alias.Fieldname does not default when adding criteria from the Criteria tab.</i> You must select the Record Alias.Fieldname using the Select Record and Field (magnifying glass) button.</p> <p>Click the <b>Select Record and Field</b> button.</p> 
43.	<p>Click the <b>A.INVOICE_DT - Invoice Date</b> link.</p> 
44.	<p>You want the system to retrieve data for a specified date range, so the Condition Type must be changed from "equal to" to "between."</p> <p>Click the button to the right of the <b>Condition Type</b> field.</p> 



Step	Action
45.	Click the <b>between</b> list item. 
46.	Once the "between" option is selected, the Choose Expression 2 Type changes from a single Constant field to a multiple Constant field. This allows you to enter a begin and end date for your INVOICE_DT range.  <i><b>NOTE: When creating a query, it is optimal to select a smaller data sample for testing such as the one used here. This will result in a quicker run time, and make it easier to test and troubleshoot your query.</b></i>  Enter the desired information into the field. Enter " <b>01012023</b> ".
47.	Enter the desired information into the <b>Date 2</b> field. Enter " <b>06302023</b> ".
48.	Based on the criterion selected, the system will retrieve data for AP vouchers having an INVOICE_DT between 01/01/22 and 01/31/22.  Click the <b>OK</b> button. 
49.	An additional row displays on the Criteria tab for INVOICE_DT.  The Logical field for INVOICE_DT defaults as "AND", requiring the system to only retrieve data meeting both criteria. Thus, the system will retrieve AP vouchers for LSUSH dated between 01/01/22 and 01/31/22.  If the Logical had been set to "OR", the system would have retrieved data that met either criteria, but not both (i.e., Business Unit does not equal LSUSH or the Invoice Date is not between 01/01/22 and 01/31/22).
50.	<b>Method 2 Summary:</b>  1. Clicked the Add Criteria button on the Criteria tab; 2. Selected INVOICE_DT as the Record Alias.Fieldname for Expression 1; 3. Changed the Condition Type from "equal to" to "between"; 4. Entered the Invoice Date range of 01/01/22 through 01/31/22; and 5. The system will retrieve AP vouchers for LSUSH only with an Invoice Date between 01/01/22 and 01/31/22.  <i><b>This completes the discussion of Method 2 - Add criteria from the Criteria tab.</b></i>  Click the <b>Save</b> button. 

## Training Guide

### Financials Query

Step	Action
51.	<p><b>Method 3 - Add criteria from the Query tab using "in list"</b></p> <p>The "in list" option allows you to specify multiple values for a field. In this example, you will select the <b>Use as Criteria</b> option on the Query tab to specify multiple values for <i>POST_STATUS_AP - Post Status</i>. The system will match comparison values in the list when compiling results.</p> <p>Click the <b>Query</b> tab.</p> 
52.	<p>Click the <b>Open Folder</b> button next to <i>A VOUCHER - AP Voucher Header Table</i> if the fields are not displayed.</p> <p>Click the <b>Down</b> scrollbar.</p> 
53.	<p>Click the <b>Open Folder</b> button next to <i>A VOUCHER - AP Voucher Header Table</i> if the fields are not displayed.</p> <p>Click the <b>POST_STATUS_AP Use as Criteria</b> button.</p> 
54.	<p>The <i>Record Alias.FieldName</i> defaults into the Expression 1 field since you selected the <i>Use as Criteria</i> button for a specific field.</p> <p>Click the <b>Select Constant From List</b> button.</p> 
55.	Click the <b>P - Posted Select Constant</b> link.
56.	<p>Click the <b>OK</b> button.</p> 
57.	<p>Click the <b>Criteria</b> tab.</p> 
58.	<p>A third row now displays on the <i>Criteria</i> tab for <i>POST_STATUS_AP</i>. The Logical defaults as "<b>AND</b>", requiring the system to only retrieve data meeting <b>all</b> criteria. If the Logical had been set to "<b>OR</b>", the system would retrieve data that met one or two criteria, but not all three.</p> <p>Click the <b>Save</b> button.</p> 

Step	Action
59.	<p><b>Method 3 Summary:</b></p> <ol style="list-style-type: none"> <li>1. Selected the Query tab.</li> <li>2. Selected the Use as Criteria button for the POST_STATUS_AP - Post Status field</li> <li>3. Selected the "P" for Posted and "U" for Unposted options from the predefined value list for POST_STATUS_AP - Post Status</li> <li>4. The system will only retrieve data that meets all three criteria</li> </ol> <p><i>This completes the discussion of Method 3 - Add criteria from the Query tab using "in list".</i></p>
60.	<p>This completes <i>Create a Query using Criteria Components</i>. <b>End of Procedure.</b></p>

# Training Guide

## Financials Query

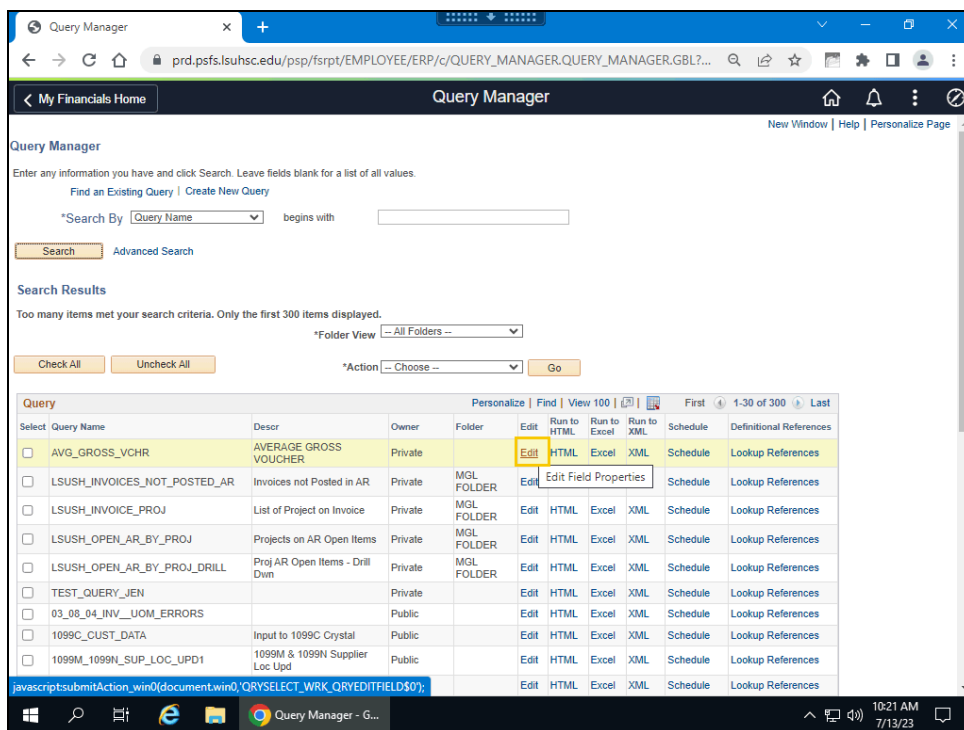
### Exercise 5



#### Edit or Delete Criteria


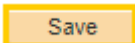

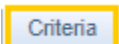

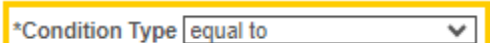


##### Procedure

##### Topic Objectives:

1. Delete criteria
2. Edit criteria
3. Run query from Query Manager using HTML option

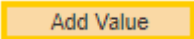

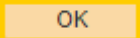
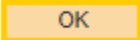

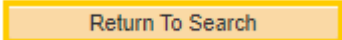
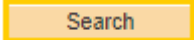




Step	Action
1.	<p>You can <i>edit or delete</i> query criteria utilizing the <b>Edit</b> link for the query on the Query Manager page.</p> <p>Click the <b>Edit - AVG_GROSS_VCHR</b> link.</p> 
2.	<p>Criteria that have already been added to your query and can <u>only</u> be <i>edited or deleted</i> from the <b>Criteria</b> tab.</p> <p>Click the <b>Criteria</b> tab.</p> 

Step	Action
3.	<p>Since you no longer wish to only view vouchers that have been posted, you need to remove the criteria specifying it from the Criteria panel.</p> <p>Click the <b>POST_STATUS_AP Delete</b> button.</p> 
4.	<p>Click the <b>Save</b> button.</p> 
5.	<p>Click the <b>Run</b> tab.</p> 
6.	<p>Click the <b>Criteria</b> tab.</p> 
7.	<p>Criteria can be edited as well as deleted. In this example, you will edit the <b>BUSINESS_UNIT</b> criteria to include HPLMC in addition to LSUSH (or LSUNA in addition to LSUNO).</p> <p>Click the <b>BUSINESS_UNIT Edit</b> button.</p> 
8.	<p>The <b>Condition Type</b> must be changed so the system will retrieve vouchers for LSUSH and HPLMC (LSUNO and LSUNA).</p> <p>Click the button to the right of the <b>Down</b> field.</p> 
9.	<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> list item.</p> 
10.	<p>Expression 2 is no longer a Constant value and indicates the comparison values the system will match when compiling results.</p> <p>Click the <b>Select List Members</b> button.</p> 

## Training Guide

### Financials Query

Step	Action
11.	<p>On the Edit List panel, 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 identifiers into the <b>Value</b> field in <u>ALL CAPS</u>.</p> <p><i><b>NOTE: New Orleans users should use the LSUNO Business Unit when running this example in RPT or SND. However, if you are using the WBT, the LSUSH Business Unit must be used.</b></i></p> <p>Enter the desired information into the <b>Value</b> field. Enter "<b>LSUSH</b>".</p>
12.	<p>The Business Unit is not added to the list until you click the Add Value button.</p> <p>Click the <b>Add Value</b> button.</p> 
13.	<p>Repeat step 12 and 13 until all Business Units have been added to the list.</p> <p><i><b>NOTE: New Orleans users should use the LSUNO Business Unit when running this example in RPT or SND. However, if you are using the WBT, the LSUSH Business Unit must be used.</b></i></p> <p>Enter the desired information into the <b>Value</b> field. Enter "<b>HPLMC</b>".</p>
14.	<p>The <b>Business Unit</b> is not added to the list until you click the <b>Add Value</b> button.</p> <p>Click the <b>Add Value</b> button.</p> 
15.	<p>Click the <b>OK</b> button.</p> 
16.	<p>Expression 2 now contains a list of Business Unit values: LSUSH and HPLMC (LSUNO and LSUNA). The system will retrieve vouchers associated with each of these Business Units.</p> <p>Click the <b>OK</b> button.</p> 
17.	<p>Click the <b>Save</b> button.</p> 
18.	<p>Click the <b>Return to Search</b> button.</p> 
19.	<p>Enter the desired information into the <b>begins with</b> field. Enter "<b>AVG%</b>".</p>
20.	<p>Click the <b>Search</b> button.</p> 

Step	Action
21.	Click the <b>AVG_GROSS_VCHR HTML</b> link.
22.	<p>The query results display. The results include vouchers for LSUSH and HPLMC (LSUNO and LSUNA) with Invoice Dates from 01/01/2023 through 01/31/2023.</p> <p>Click the <b>Last</b> link.</p> 
23.	<p>Click the <b>Close</b> button.</p> 
24.	<p>This completes <i>Edit and/or Delete Criteria</i>.</p> <p><b>End of Procedure.</b></p>

# Training Guide

## Financials Query

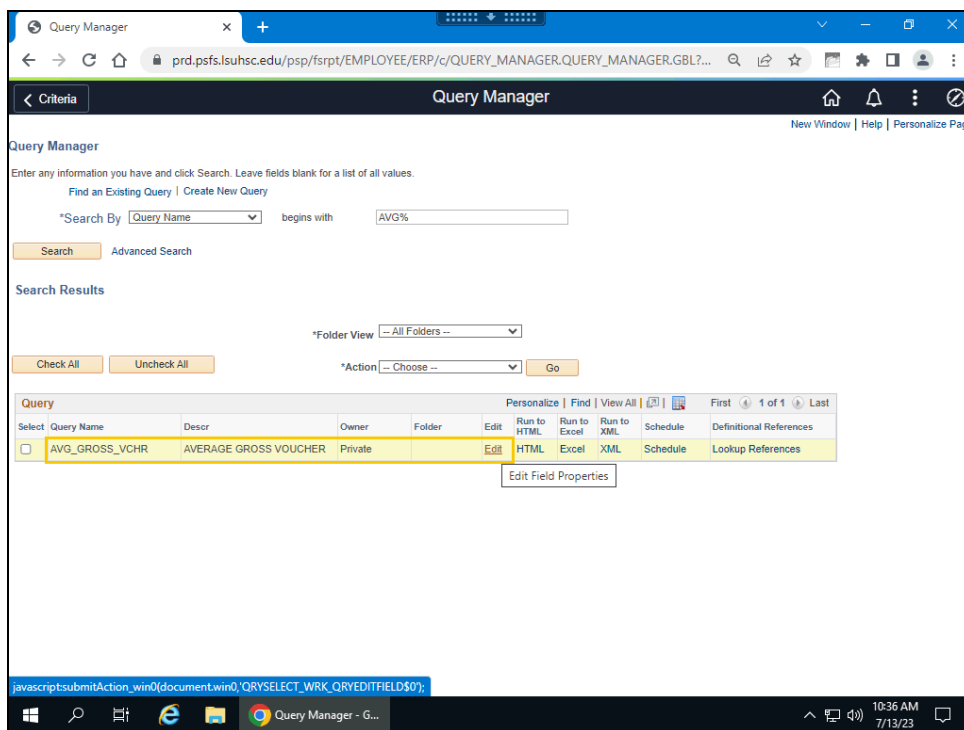
### Exercise 6

#### Create a Runtime Prompt

##### Procedure

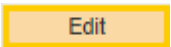




##### Topic Objectives:

1. Create a single run-time Prompt
2. How to use Optional alternative
3. How to use Default Value



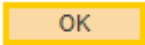
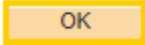


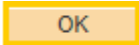

Step	Action
1.	<p>Runtime Prompts allow you to further refine your query output results. Adding a prompt allows the user to specify a value, and return results based on the value provided when running the query. A prompt page requests the required values. The query uses the entered value as a comparison value for the prompt criterion.</p> <p>Users generally want to limit results to a certain business unit. In this example, you will create a single prompt to specify your business unit at run-time. The Optional alternative and Default Value will also be demonstrated in this topic.</p> <p>Click the <b>AVG_GROSS_VCHR Edit</b> link.</p>
2.	<p>Click the <b>Criteria</b> tab.</p> <p><b>Criteria</b></p>

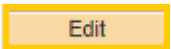

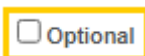
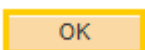
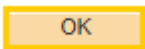


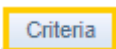
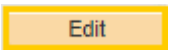



Step	Action
3.	<p><b>Scenario</b></p> <p>In this exercise, users will edit a previously developed query to create a single prompt for the <b>BUSINESS_UNIT</b> field when the query is run. Users will also run the query using the Optional alternative and Default Value after effectuating the prompt. A prompt is used in this instance because it is more efficient than creating a list that includes all Business Units.</p> <p>Click the <b>BUSINESS_UNIT Edit</b> button.</p> 
4.	<p>You will change the Condition Type 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 button to the right of the <b>Condition Type</b> field.</p> 
5.	<p>Click the <b>equal to</b> list item.</p> 
6.	<p>Once 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> 
7.	<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 box: <b>New Prompt</b> and <b>Edit Prompt</b>. 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> 
8.	<p><b>Edit Prompt Properties</b></p> <p>The <b>Edit Prompt Properties</b> is where you define prompt parameters 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, Time, Number, etc.); and  <b>Format</b> - Specifies the format (i.e.,</p>

## Training Guide

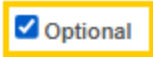
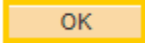
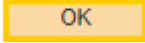

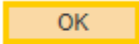
### Financials Query



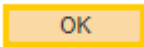
Step	Action
9.	<b>Edit Prompt Properties</b> (continued)  <b>Length</b> - The number of available characters for that field; <b>Decimals</b> - The number, if any, of decimal places allowed; and <b>Edit Type</b> - Allows you to evaluate a value against a set of tables to determine if the value is valid.
10.	<b>Edit Prompt Properties</b> (continued)  <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.
11.	<i>The optional checkbox is used to determine if a prompt is optional or required. The default is that the box is cleared, indicating that the prompt is a <u>required</u> value.</i>
12.	<p>In this example, the Optional checkbox will remain unchecked requiring a prompt value be entered. The other prompt values will remain as defaulted.</p> <p>Click the <b>OK</b> button.</p> 
13.	<p>Click the <b>OK</b> button.</p> 
14.	<p>Click the <b>Save</b> button.</p> 
15.	<p>Click the <b>Run</b> tab.</p> 
16.	<p>A prompt window displays on the page. 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>LSUSH</b>".</p>
17.	<p>Click the <b>OK</b> button.</p> 
18.	<p>Click the <b>Criteria</b> tab.</p> 

Step	Action
19.	<p>You can edit your prompt parameters as your needs require.</p> <p>Click the <b>Edit</b> button.</p> 
20.	<p>Click the <b>Edit Prompt</b> link.</p> 
21.	<p><i>When the Optional box is checked, it indicates the prompt entry for the field is optional. No value would be required at run time in the prompt box.</i></p> <p><b>CAUTIONARY NOTE:</b> <i>If the prompt value is set up to optional, the query result set may be too large since the results are not limited.</i></p> <p>Click the <b>Optional</b> option.</p> 
22.	<p>Click the <b>OK</b> button.</p> 
23.	<p>Click the <b>OK</b> button.</p> 
24.	<p>Click the <b>Run</b> tab.</p> 
25.	<p>At run-time, a user would <b>not</b> be <b>required</b> to perform an entry in the run-time prompt dialog for the Unit.</p> <p>Click the <b>OK</b> button.</p> 
26.	<p>In this example, the optional dialog would work as if it were a wildcard returning any Business Unit entries for which you have security access.</p> <p>Click the <b>Criteria</b> tab.</p> 
27.	<p>Click the <b>BUSINESS_UNIT Edit</b> button.</p> 
28.	<p>Click the <b>Edit Prompt</b> link.</p> 

## Training Guide

### Financials Query

Step	Action
29.	<p>Uncheck the <b>Optional</b> box.</p> <p>Click the <b>Optional</b> option.</p> 
30.	<p><b>Default Value</b></p> <p><i>The Default Value box is used to set a default value for the prompt. This value is used as the prompt value at run-time if no other value is entered. At run-time, values entered in the Default Value box will display in the prompt entry box. This may be overwritten if desired.</i></p> <p><i>NOTE: If a Default Value is entered in the box, the query prompt optional checkbox may not be selected at the same time. Default Values indicate that the prompt value is required.</i></p> <p>Enter the desired information into the <b>Default Value</b> field. Enter "<b>LSUSH</b>".</p> <p><i>NOTE: New Orleans users should use the LSUNA Business Unit when running this example in RPT or SND. However, if you are using the WBT, the HPLMC Business Unit must be used.</i></p>
31.	<p>Click the <b>OK</b> button.</p> 
32.	<p>Click the <b>OK</b> button.</p> 
33.	<p>Click the <b>Run</b> tab.</p> 
34.	<p>The prompt entry box displays the Default Value. As previously noted, this may be overwritten if another value is desired at run-time.</p> <p>Enter the desired information into the <b>Unit</b> field. Enter "<b>LSUSH</b>".</p> <p><i>NOTE: New Orleans users should use the LSUNO Business Unit when running this example in RPT or SND. However, if you are using the WBT, the LSUSH Business Unit must be used.</i></p>
35.	<p>Click the <b>OK</b> button.</p> 

Step	Action
36.	<p>When the Default Value is overwritten in the prompt dialog at run-time, the query results will be limited to the prompt criteria entered.</p> <p>Click the <b>Rerun Query</b> link.</p> 
37.	<p>The Default Value is populated even if the user were to blank out the field value at run-time. In this example, the default for Business Unit is LSUSH. If you blank out the field and the query results will still produce results for LSUSH.</p> <p>Highlight <b>LSUSH</b> and click the <b>[Delete]</b> button on your keyboard to blank out the Unit field.</p> 
38.	<p>Click the <b>OK</b> button.</p> 
39.	Query results for the <b>Default Value = LSUSH</b> display.
40.	<p>This completes <i>Create a Runtime Prompt</i>.</p> <p><b>End of Procedure.</b></p>

### Exercise 7

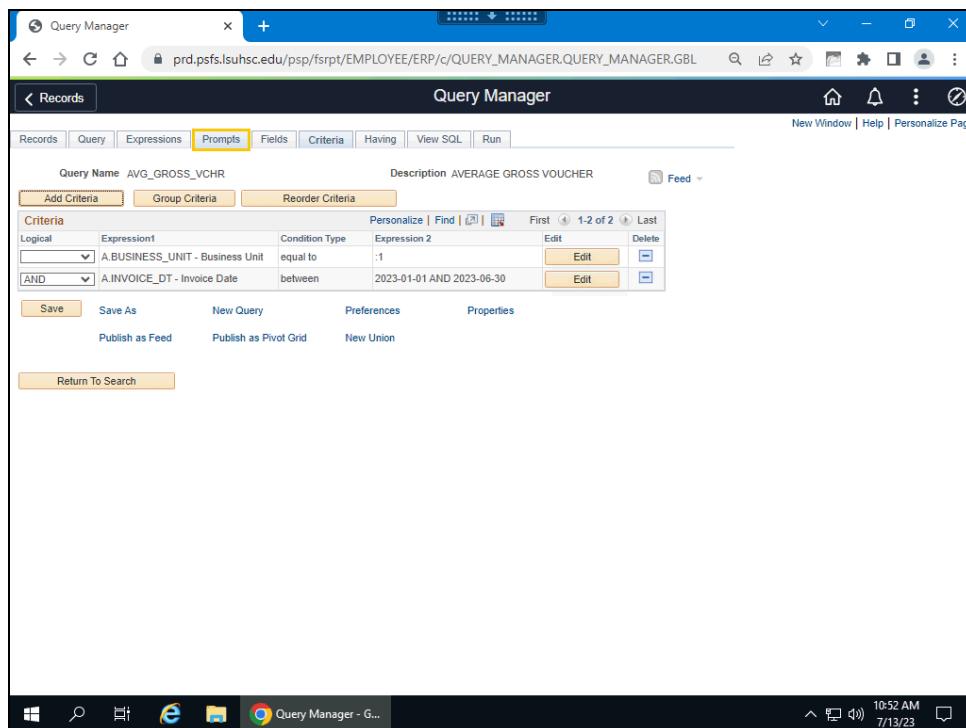
#### Create Multiple Runtime Prompts

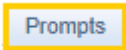


##### Procedure

##### Topic Objectives:

1. Create multiple run-time prompts.
  - a. Create run-time prompt for Begin Invoice Dt.
  - b. Create run-time prompt for End Invoice Dt.
2. Edit Criteria tab to include multiple prompts for Expression 2.

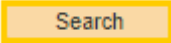

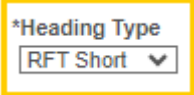

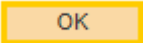


Step	Action
1.	In the previous topic, the specified prompt value was a constant. <b>Multiple</b> prompts can be created for use at run-time. Some <i>system variables</i> can also be used as <i>default prompt values</i> for some <i>prompt types</i> . For example, if the user enters <i>%Date</i> as the <i>Default Value</i> for an End Date, the current date will default into the prompt field.
2.	<b>Scenario</b>  In this exercise, an invoice list will be generated by creating <b>multiple prompts</b> for the <b>INVOICE_DT</b> field. Prompts must <u>first</u> be created separately from the criteria on the <i>Prompts</i> tab. Users will return to the <i>Criteria</i> tab, after effectuating the prompts on the Prompts tab, to <i>Edit Prompt Properties</i> for INVOICE_DT.




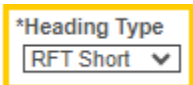

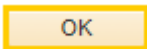
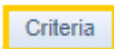
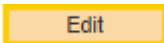
Step	Action
3.	<p>In this example, users will create two prompts for <b>INVOICE_DT: Begin Invoice Dt</b> and <b>End Invoice Dt</b>. This will limit our results to a specified timespan. Unlike in the previous topic where the prompt was created from the Criteria tab, the <b>INVOICE_DT</b> prompts must be created <u>first</u> on the <b>Prompts</b> tab.</p> <p>Click the <b>Prompts</b> tab.</p> 
4.	<p>The <b>BUSINESS_UNIT</b> with the identifier <b>:1</b> displays first on the <i>Prompts</i> tab.</p> <p>In this example, users will first create the <b>Begin Invoice Dt</b> prompt.</p> <p>Click the <b>Add Prompt</b> button.</p> 
5.	<p>You <u>must</u> select the prompt <i>Field Name</i>.</p> <p>Click the <b>Select Field - Field Name</b> button.</p> 
6.	<p>Enter the field name in the <b>Search by</b> field. In this example, use <b>INVOICE_DT</b>.</p> <p>Enter the desired information into the <b>begins with</b> field. Enter <b>"INVOICE_DT"</b>.</p>

## Training Guide

### Financials Query

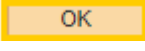
Step	Action
7.	Click the <b>Search</b> button. 
8.	Select the field that <u>exactly</u> matches the field name <b>INVOICE_DT</b> .  Click the <b>INVOICE_DT</b> link. 
9.	<b>Edit Prompt Properties</b>  The field name defaults into the <i>Field Name</i> field. Change the <b>Heading Type</b> to <b>Text</b> .  Click the button to the right of the <b>Heading Type</b> field. 
10.	Click the <b>Text</b> list item. 
11.	Change the <b>Heading Text</b> to " <b>Begin Invoice Dt</b> ". This will prompt the beginning invoice date in the timespan.  Enter the desired information into the <b>Heading Text</b> field. Enter " <b>Begin Invoice Date</b> ".
12.	Click the <b>OK</b> button. 
13.	The <b>INVOICE_DT - Begin Invoice Dt</b> with the identifier <b>:2</b> displays on the <i>Prompts</i> tab.  Users will now create the <b>End Invoice Dt</b> prompt.  Click the <b>Add Prompt</b> button. 
14.	Click the <b>Select Field - Field Name</b> button. 



Step	Action
15.	<p>The previous search list displays. Remember to select the option that <u>exactly</u> matches the field name INVOICE_DT.</p> <p>Click the <b>INVOICE_DT</b> link.</p> 
16.	<p>The INVOICE_DT field name displays. Change the <b>Heading Type</b> to <b>Text</b>.</p> <p>Click the button to the right of the <b>Heading Type</b> field.</p> 
17.	<p>Click the <b>Text</b> list item.</p> 
18.	<p>Enter the desired information into the <b>Heading Text</b> field. Enter "<b>End Invoice Date</b>".</p>
19.	<p>As mentioned earlier in this exercise, system variables may be used as a Default Value for a prompt. In this example, %Date will be used as the Default Value. This will allow the current date to default into the End Invoice Dt prompt at run-time. Users will still be able to change the End Invoice Dt at run-time if desired.</p> <p>Enter the desired information into the <b>Default Value</b> field. Enter "<b>%Date</b>".</p>
20.	<p>Click the <b>OK</b> button.</p> 
21.	<p>The <b>INVOICE_DT - End Invoice Dt</b> with the identifier ':3' displays on the Prompts tab.</p> <p>New criteria must now be added for <b>INVOICE_DT</b>.</p> <p>Click the <b>Criteria</b> tab.</p> 
22.	<p>Click the <b>INVOICE_DT - Invoice Date Edit</b> button.</p> 
23.	<p><b>Edit Criteria Properties</b></p> <p><i>Expression 1 Record Alias.FieldName</i> defaults to <i>INVOICE_DT - Invoice Date</i> because the criteria button for that field was selected on the <b>Fields</b> tab.</p> <p>Also note the <b>Condition Type</b> is set to "<b>between</b>". The Condition Type will remain as defaulted as you will be prompting for two expressions in one criteria (e.g., Begin Invoice Dt and End Invoice Dt).</p>

## Training Guide

### Financials Query

Step	Action
24.	<p>Users will change the <b>Choose Expression 2 Type</b> from Const-Const to <b>Expr-Expr</b> to allow for prompts.</p> <p>Click the <b>Expr - Expr</b> option.</p> 
25.	<p>Users will now assign the prompts to <b>Expression 2</b>. You will first assign the <b>INVOICE_DT - Begin Invoice Dt</b> prompt.</p> <p>Click the <b>Define Expression - Add Prompt</b> link.</p> 
26.	<p>Click the <b>:2 = INVOICE_DT - Begin Invoice Date Select a Prompt</b> link.</p> 
27.	<p>Click the <b>Define Expression 2 - Add Prompt</b> link.</p> 
28.	<p>Click the <b>:3 = INVOICE_DT - End Invoice Date Select a Prompt</b> link.</p> 
29.	<p>Click the <b>OK</b> button.</p> 
30.	<p>Click the <b>Run</b> tab.</p> 
31.	Enter the desired information into the <b>Unit</b> field. Enter " <b>LSUSH</b> ".
32.	Enter the desired information into the <b>Begin Invoice Date</b> field. Enter " <b>01012023</b> ".
33.	<p><b>NOTE: The End Invoice Date will default to the current date. You may change this date to the desired end date.</b></p> <p>Enter the desired information into the <b>End Invoice Date</b> field. Enter "<b>07132023</b>".</p>
34.	<p>Click the <b>OK</b> button.</p> 
35.	The query will display.
36.	<p>This completes <b>Create Multiple Runtime Prompts</b>.</p> <p><b>End of Procedure.</b></p>

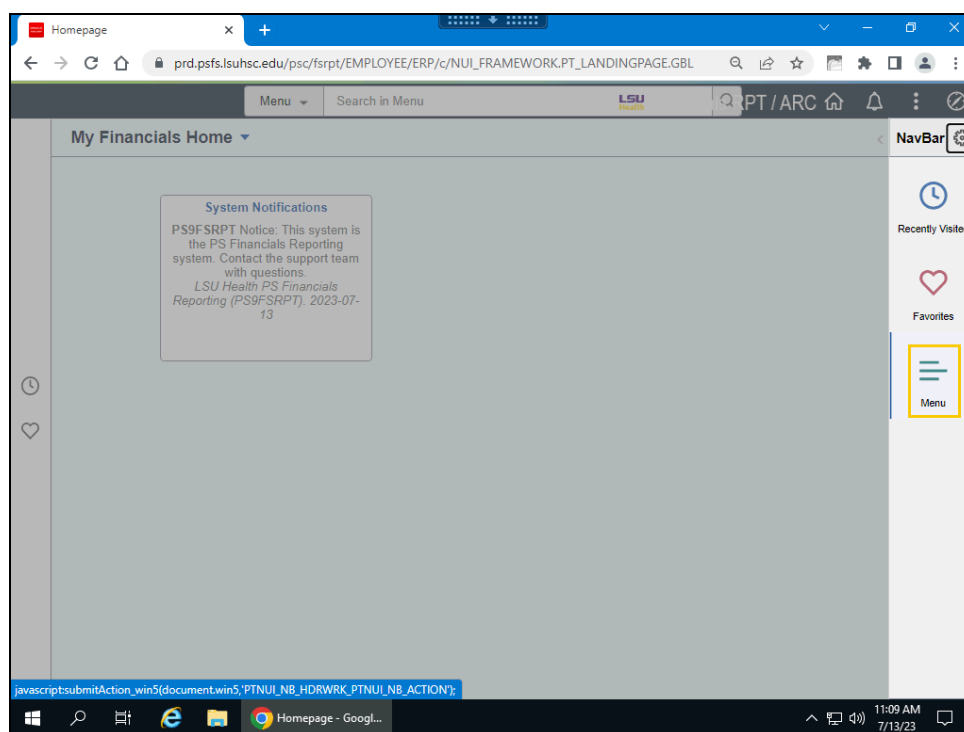
## Exercise 8

### Create a Query Using Hierarchy Joins

#### Procedure

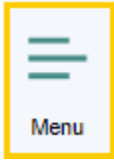


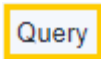
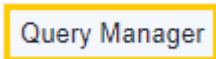

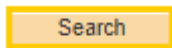

#### Topic Objectives:






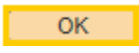


1. Introduce Hierarchy Joins
2. Three types of joins:
  - a. Hierarchy joins
  - b. Related Record joins
  - c. Any joins
3. Create Hierarchy Join query
  - a. Select first VENDOR - Supplier Header Table
  - b. Hierarchy Join VENDOR\_ADDR - Supplier Address record to VENDOR - Supplier Header Table
4. Run test of query



## Training Guide






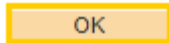


### Financials Query

Step	Action
1.	<p>A Hierarchy Join tables/records 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 exercise, you will create a Hierarchy Join when the <b>VENDOR_ADDR - Supplier Address</b> record (child) is joined to the <b>VENDOR- Supplier Header</b> Table (parent).</p> <p>Click the <b>Menu</b> link.</p> 
2.	<p>Click the <b>Down</b> button of the scrollbar.</p> 
3.	<p>Click the <b>Reporting Tools</b> link.</p> 
4.	<p>Click the <b>Query</b> link.</p> 
5.	<p>Click the <b>Query Manager</b> link.</p> 
6.	<p>Click the <b>Create New Query</b> link.</p> 
7.	<p>You will first search for the parent table/record.</p> <p>Enter the desired information into the <b>begins with</b> field. Enter "<b>VENDOR</b>".</p>
8.	<p>Click the <b>Search</b> button.</p> 
9.	<p>Click the <b>Add Record</b> link.</p> 

Step	Action
10.	<p>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 <b>VENDOR</b> table is the alias 'A' because it is the first record used.</p> <p>You will select the following fields from the <b>VENDOR</b> record: <b>VENDOR_ID</b>, <b>NAME1</b>, and <b>VENDOR_STATUS</b>.</p>
11.	<p>Click the <b>VENDOR_ID - Supplier ID</b> option.</p> 
12.	<p>Click the <b>NAME1 - Supplier Name</b> option.</p> 
13.	<p>Click the <b>VENDOR_STATUS - Supplier Status</b> option.</p> 
14.	<p>By clicking the <b>Hierarchy Join</b> link, all of the records that have a parent/child relationship with the <b>VENDOR</b> table display.</p> <p>Click the <b>Hierarchy Join</b> link.</p> 
15.	<p>The <b>VENDOR</b> table is the parent record. The <b>VENDOR_ADDR</b> record is a child of the <b>VENDOR_ADDR_SCROL</b> record. The <b>VENDOR_ADDR_SCROL</b> record is a child of the parent record <b>VENDOR</b> table.</p> <p>Click the <b>VENDOR_ADDR - Supplier Address</b> link.</p> 
16.	<p>An effective date message displays when a record is selected. All data will be retrieved, including addresses with the most recent 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 <b>VENDOR_ADDR</b> record. The system will first retrieve data for the 'A' record and then the data for the 'B' record.</p>
18.	<p>Click the <b>ADDRESS1 - Address Line 1</b> option.</p> 
19.	<p>Click the <b>CITY - City</b> option.</p> 

## Training Guide

### Financials Query

Step	Action
20.	Click the <b>STATE - State</b> option. 
21.	Click the <b>POSTAL - Postal Code</b> option. 
22.	Click the <b>Up</b> button of the scrollbar. 
23.	Click the <b>Fields</b> tab. 
24.	The Fields tab displays all the records and fields selected for the current query. Click the <b>Save As</b> link. 
25.	Enter the desired information into the <b>Query</b> field. Enter " <b>HIERARCHY_JOIN</b> ".
26.	Enter the desired information into the <b>Description</b> field. Enter " <b>TEST FOR CLASS</b> ".
27.	Enter the desired information into the <b>Query Definition</b> field. Enter " <b>DATE CREATED</b> ".
28.	Click the <b>OK</b> button. 
29.	You can preview your query in the Run tab. Click the <b>Run</b> tab. 
30.	Your supplier address list displays. Click the <b>Records</b> button. 
31.	This completes <i>Create a Query Using Hierarchy Joins</i> . <b>End of Procedure.</b>

## Exercise 9

### Create a Query Using Standard (Any) Joins

#### Procedure

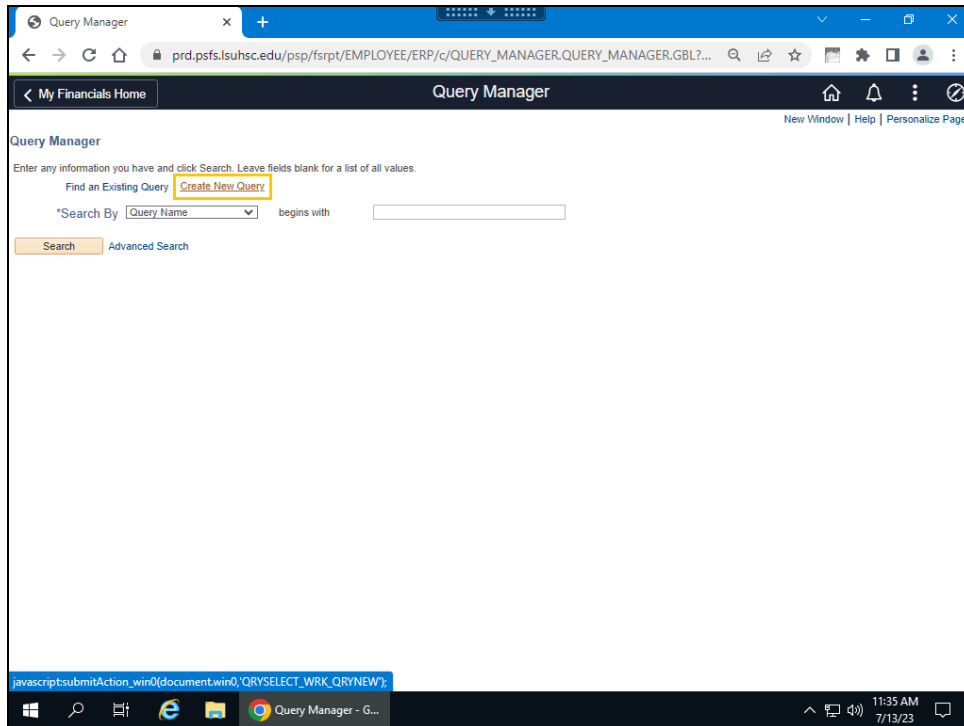
#### Topic Objectives:


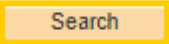




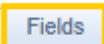
1. Introduce Any Joins
2. Create Any Join query
  - a. Select first PO\_HDR record
    - 1) Add criteria to PO\_DT field
  - b. Any Join PO\_LINE\_DISTRIB record to PO\_HDR record
3. Run test of query

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 tab 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/record when using a Standard (Any) Join.</p> <p><b><i>NOTE: When creating a Standard (Any) Join, the records you wish to join must have a common key field for joining. Query will attempt to automatically join the records based on the keys in each records.</i></b></p>
2.	<p>In this exercise, you will join the <b>PO_HDR</b> record and the <b>PO_LINE_DISTRIB</b> record to retrieve Purchase Orders (POs) between a specified <i>date range</i> for a specified <i>Business Unit</i>. You will also find the <i>merchandise amount</i> of the PO and <i>Department ID</i> number associated with the PO.</p>








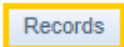
# Training Guide

## Financials Query



Step	Action
3.	Click the <b>Create New Query</b> link. 
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>PO_HDR - Purchase Order Header Add Record Add Record</b> link. 
7.	Click the <b>BUSINESS_UNIT - Business Unit</b> option. 
8.	Click the <b>PO_ID - PO Number</b> option. 
9.	Click the <b>PO_DT - Purchase Order Date</b> option. 
10.	Click the <b>Fields</b> tab. 





Step	Action
11.	Click the <b>BUSINESS_UNIT - Business Unit Add Criteria</b> button. 
12.	<i><b>NOTE: Shreveport users should use the LSUSH Business Unit when running this example in RPT or SND. However, if you are using the WBT, the LSUNO Business Unit must be used.</b></i>  Enter the desired information into the <b>Constant</b> field. Enter " <b>LSUNO</b> ".
13.	Click the <b>OK</b> button. 
14.	Click the <b>PO_DT - Purchase Order Date Add Criteria</b> button. 
15.	Click the button to the right of the <b>Condition Type</b> field. 
16.	Click the <b>between</b> list item. 
17.	For this exercise, use the date range 01/01/2023 through 01/31/2023.  <i><b>NOTE: When creating a query, it is optimal to select a smaller data sample for testing, such as 01/01/2023 - 01/31/2023. This will result in a quicker run time, and make it easier to test and troubleshoot your query.</b></i>  Enter the desired information into the <b>Date</b> field. Enter " <b>01012023</b> ".
18.	Enter the desired information into the <b>Date 2</b> field. Enter " <b>06302023</b> ".
19.	Click the <b>OK</b> button. 
20.	Click the <b>Run</b> tab. 
21.	Your query results display. Now that you have verified that everything is correct with the current record, you can now join your next record.  Click the <b>Records</b> tab. 
22.	Enter the desired information into the <b>begins with</b> field. Enter " <b>PO_LINE_DISTRIB</b> ".

## Training Guide

### Financials Query

Step	Action
23.	Click the <b>Search</b> button. 
24.	Click the <b>PO_LINE_DISTRIB Join Record</b> link. 
25.	In the <b>Join Type</b> section, the system defaults to the "Join to filter and get additional fields (Standard Join)" option. This should remain as defaulted.  Click the <b>PO_HDR - Purchase Order Header</b> link. 
26.	The system displays the detected join conditions.  Click the <b>Add Criteria</b> button. 
27.	Click the <b>MERCHANDISE_AMT - Merchandise Amount</b> option. 
28.	Click the <b>DEPTID - Department</b> option. 
29.	You can preview your query in the Run tab.  Click the <b>Run</b> tab. 
30.	Your Standard (Any) Joins query displays.  Click the <b>Fields</b> tab. 
31.	Click the <b>Save As</b> link. 
32.	Enter the desired information into the <b>Query</b> field. Enter " <b>STANDARD_JOIN</b> ".
33.	Enter the desired information into the <b>Description</b> field. Enter " <b>TEST FOR CLASS</b> ".
34.	Enter the desired information into the <b>Query Definition</b> field. Enter " <b>DATE CREATED</b> ".

Step	Action
35.	Click the <b>OK</b> button. 
36.	Click the <b>Fields</b> button. 
37.	This completes <i>Create a Query Using Standard (Any) Joins</i> . <b>End of Procedure.</b>

# Training Guide

## Financials Query

### Exercise 10

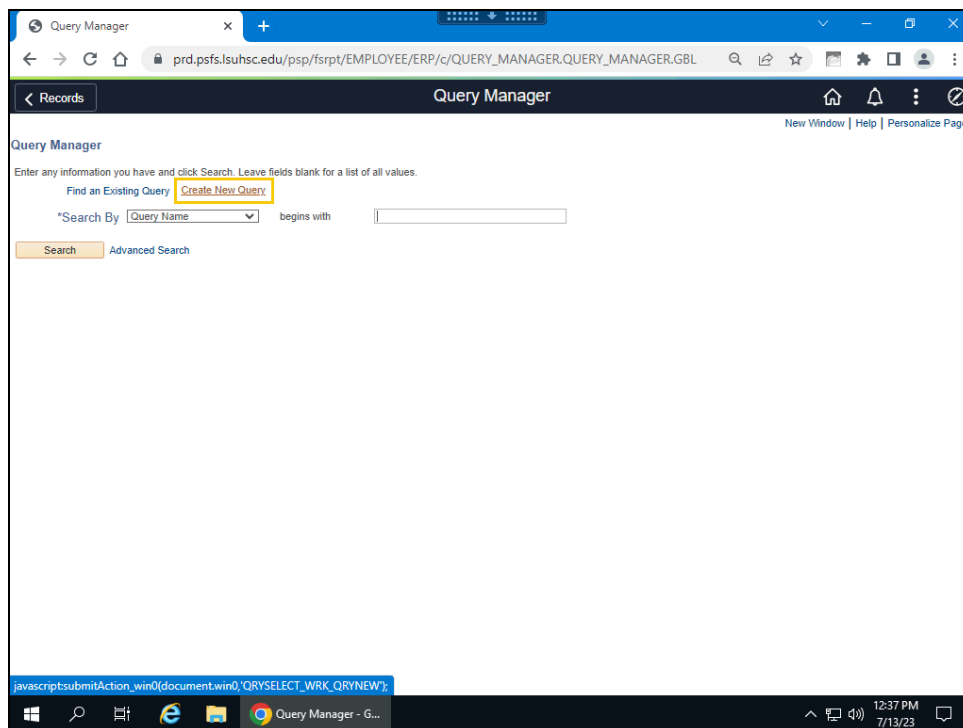
#### Create a Query using Related Record Joins


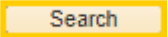
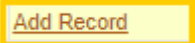




##### Procedure

##### Topic Objectives:

1. Introduce Related Record Joins
2. Create Related Record Join
  - a. Select first the **ITEM\_MFG**
  - b. Select fields from **ITEM\_MFG** including Item Id and Manufacturer ID
  - c. Select Related Record Join **MANUFACTURER - Manufacturer Table**
3. Reorder fields
4. Add criteria to query
5. Run test of query


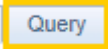

Step	Action
1.	In a <b>Related Record Join</b> you can automatically join two records based on a relationship that has been predefined in the record designer. <b>Related Record Joins</b> display as a link to the right of a field. The criteria relationship between the fields has already been identified, so no criteria needs to be added.
2.	<p>In this exercise, you will create a query to retrieve <b>Inventory Item ID</b>, <b>Manufacturer's ID</b>, and the <b>Manufacturer's Name</b>.</p> <p>In order to retrieve the data, you will need to join two records, the <b>ITEM_MFG - Item Manufacturer Table</b> and the <b>MANUFACTURER - Manufacturer Table</b>.</p>

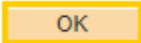




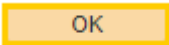



Step	Action
3.	Click the <b>Create New Query</b> link. 
4.	Enter the desired information into the <b>begins with</b> field. Enter " <b>ITEM_MFG</b> ".
5.	Click the <b>Search</b> button. 
6.	Click the <b>ITEM_MFG - Item Manufacturer Table Add Record</b> link. 
7.	Click the <b>SETID - SetID</b> option. 
8.	Click the <b>INV_ITEM_ID - Item ID</b> option. 
9.	Click the <b>MFG_ID - Manufacturer ID</b> option. 
10.	Click the <b>Fields</b> tab. 

## Training Guide

### Financials Query

Step	Action
11.	<p><b>NOTE:</b> Add Criteria to the <b>SETID</b> and <b>INV_ITEM_ID</b> fields to retrieve a small data sample for testing.</p> <p>Click the <b>SETID - Set ID Add Criteria</b> button.</p> 
12.	Enter the desired information into the <b>Constant</b> field. Enter " <b>SHARE</b> ".
13.	Click the <b>OK</b> button.
14.	Click the <b>INV_ITEM_ID Add Criteria</b> button.
15.	Click the button to the right of the <b>Condition Type</b> field.
16.	Click the <b>between</b> list item.
17.	Enter the desired information into the <b>Constant</b> field. Enter " <b>102000</b> ".
18.	Enter the desired information into the <b>Constant 2</b> field. Enter " <b>102500</b> ".
19.	Click the <b>OK</b> button.
20.	Click the <b>Run</b> tab.
21.	<p>Your query results display. Now that you have verified that everything is correct with the current record, you can now join your next record.</p> <p>Click the <b>Query</b> tab.</p> 
22.	<p><b>NOTE:</b> Like <i>Hierarchy Joins</i>, <i>Related Record Joins</i> are predefined in the system. The relationship between the fields has already been identified, so no criterion needs to be added.</p> <p>Click the <b>Join MANUFACTURER - Manufacturer Table</b> link.</p> 

Step	Action
23.	<p>In the Join Type box, the "Join filter and get additional fields (Standard Joins)" option defaults and should remain as defaulted.</p> <p>Click the <b>OK</b> button.</p> 
24.	<p>The 'B' alias record has been assigned to the MANUFACTURER record.</p> <p>Click the <b>DESCR60 - Description</b> option.</p> 
25.	<p>Click the <b>Run</b> tab.</p> 
26.	<p>Click the <b>Fields</b> tab.</p> 
27.	<p>Click the <b>Save As</b> link.</p> 
28.	<p>Enter the desired information into the <b>Query</b> field. Enter "<b>RELATED_RECORD_JOIN</b>".</p>
29.	<p>Enter the desired information into the <b>Description</b> field. Enter "<b>TEST FOR CLASS</b>".</p>
30.	<p>Enter the desired information into the <b>Query Definition</b> field. Enter "<b>DATE CREATED</b>".</p>
31.	<p>Click the <b>OK</b> button.</p> 
32.	<p>Click the <b>Fields</b> button.</p> 
33.	<p><b>End of Procedure.</b></p>

# Training Guide

## Financials Query

### Exercise 11

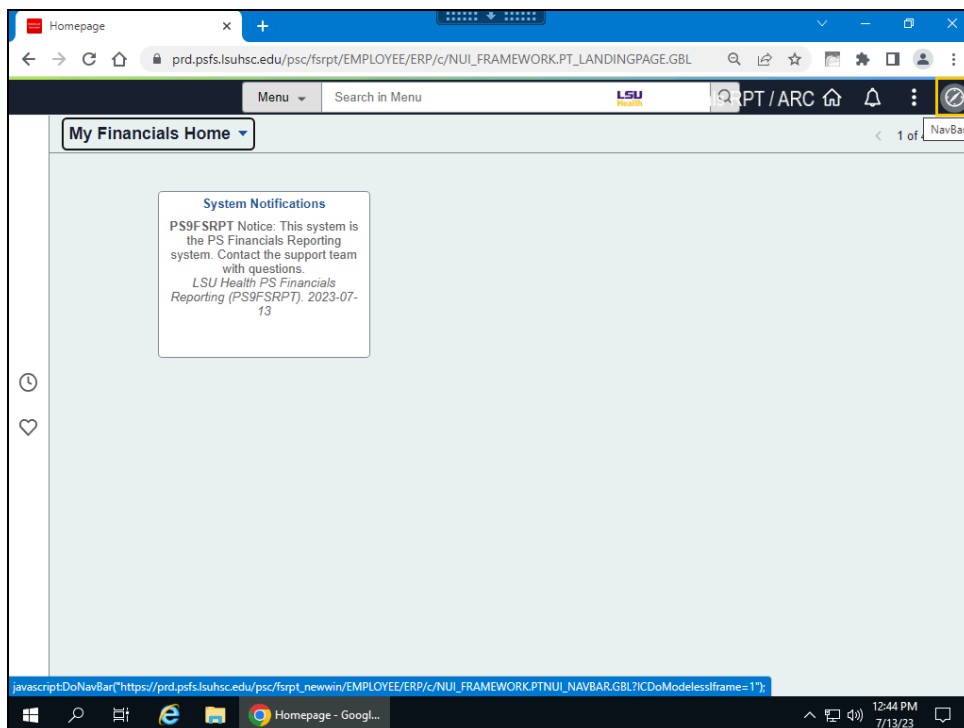
#### Schedule a Query

##### Procedure


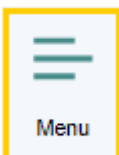

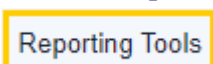
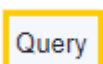
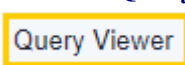
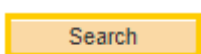
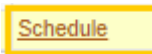
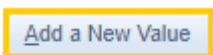
##### Topic Objectives:

1. Schedule a query from the Query Manager page
  - a. Add Run Control ID SCHED\_QUERY
  - b. Adjust Run Time, Run Date if needed, and Format
2. Schedule a query from the Query menu
  - a. Find the existing Run Control ID SCHED\_QUERY

Step	Action
1.	<p>Queries may be scheduled through the use of the Process Scheduler and viewed through 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. Another use for scheduling a query is to produce results weekly for review.</p> <p>In this exercise, you will schedule the <b>LSU_VENDORS_W_ADDRESS</b> query to run in five minutes.</p>


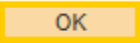


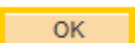

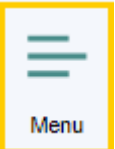





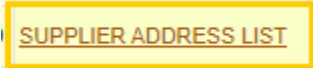




Step	Action
2.	Click the <b>NavBar</b> button. 
3.	Click the <b>Menu</b> button. 
4.	Click the <b>Down</b> button of the scrollbar. 
5.	Click the <b>Reporting Tools</b> link. 
6.	Click the <b>Query</b> link. 
7.	Click the <b>Query Viewer</b> link. 
8.	Enter the desired information into the <b>begins with</b> field. Enter " <b>LSU_VENDORS</b> ".
9.	Click the <b>Search</b> button. 
10.	Click the <b>LSU_VENDORS_W_ADDRESS schedule</b> link. 
11.	<p>The system defaults you into the Find an Existing Value tab. A Run Control ID must be added the first time you schedule a query.</p> <p>The Run Control ID is used to access the Process Scheduler. The Run Control ID is:</p> <ol style="list-style-type: none"> <li>1. Specific to the User ID;</li> <li>2. Can be entered in upper, lower, or mixed case;</li> <li>3. Can be up to thirty (30) characters long;</li> <li>4. Cannot contain any special characters such as &amp;, \$, %, etc.; and</li> <li>5. Must be one continuous string of characters. Cannot contain any blank spaces. An underscore can be used to link words.</li> </ol>
12.	Click the <b>Add a New Value</b> tab. 

## Training Guide

### Financials Query

Step	Action
13.	Enter the desired information into the <b>Run Control ID</b> field. Enter " <b>SCHED_QUERY</b> ".
14.	Click the <b>Add</b> button. 
15.	Enter the desired information into the <b>Description</b> field. Enter " <b>SUPPLIER ADDRESS LIST</b> ".
16.	Click the <b>OK</b> button. 
17.	Click the button to the right of the <b>Server Name</b> field. 
18.	Click the <b>PSNT</b> list item. 
19.	Enter the desired information into the <b>Run Time</b> field. Enter " <b>12:51</b> ".
20.	Click the <b>OK</b> button. 
21.	Once the scheduled time has elapsed, and the query runs, you can view the query results via the <b>Report Manager</b> .  Click the <b>NavBar</b> button. 
22.	Click the <b>Menu</b> button. 
23.	Click the <b>Reporting Tools</b> link. 
24.	Click the <b>Report Manager</b> button. 
25.	Click the <b>Refresh</b> button. 

Step	Action
26.	<p>Click the link displaying in the <b>Description</b> column to view the results. This will open a new window.</p> <p><i><b>NOTE: If multiple processes, queries, and/or reports have been run by the user, the most current will display at the top of the list.</b></i></p> <p>Click the <b>SUPPLIER_ADDRESS_LIST</b> link.</p> 
27.	<p>Once the results display, you can use any functionality in Excel to manipulate the results.</p> <p>Click the <b>Close Report</b> button.</p> 
28.	<p>Click the <b>Close</b> button.</p> 
29.	<p>This completes <i>Schedule a Query</i>.</p> <p><b>End of Procedure.</b></p>

# Training Guide

## Financials Query

### Actions

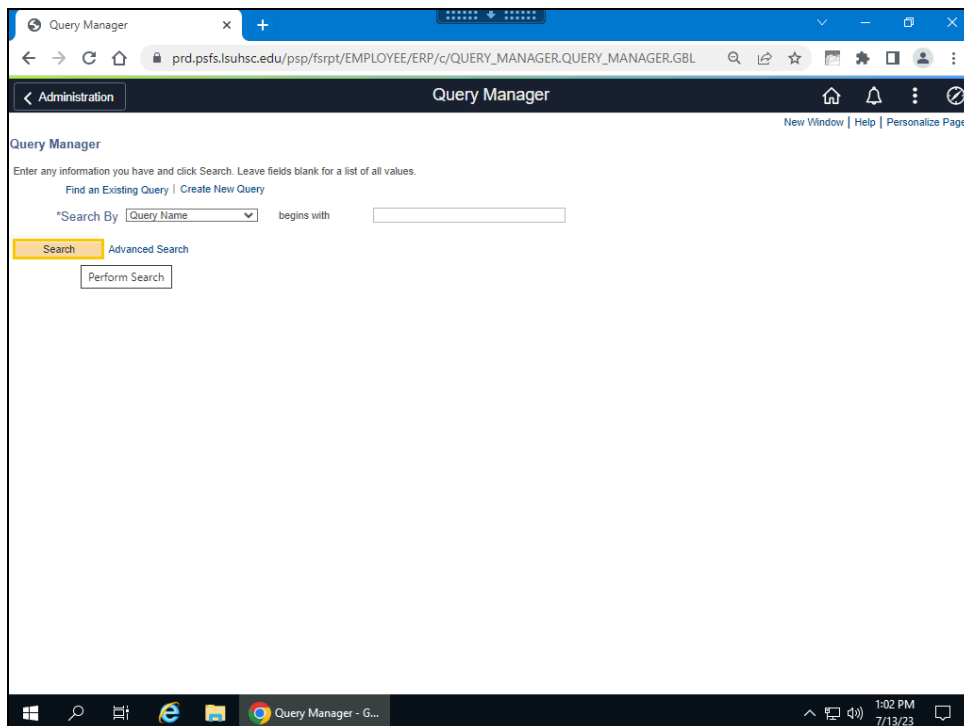
#### Add a Query to Favorites

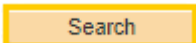

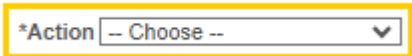

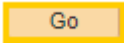

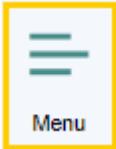
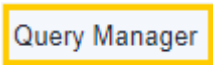
##### Procedure

##### Topic Objectives:

1. Select query to add to My Favorite Queries list
2. Introduce steps to add query to My Favorite Queries list
3. Navigate to Query Manager
  - a. View My Favorite Queries list

Step	Action
1.	<p>In this exercise, users will add the private query ANY_JOINS, created in Exercise 10, to Favorites.</p> <p><b><i>NOTE: Both Private and Public queries can be added to Favorites.</i></b></p>



Step	Action
2.	Click the <b>Search</b> button. 
3.	A user must select the query s/he intends to add to Favorites. Click the <b>STANDARD_JOIN</b> option. 
4.	Click the button to the right of the <b>Action</b> field. 
5.	Click the <b>Add to Favorites</b> list item. 
6.	Click the <b>Go</b> button. 
7.	Your query is added to My Favorite Queries. This list displays when the user enters on the Query Manager page. Navigate back to the Query Manager page to view My Favorite Queries. Click the <b>NavBar</b> button. 
8.	Click the <b>Menu</b> button. 
9.	Click the <b>Query Manager</b> button. 
10.	The <b>My Favorite Queries</b> list displays on the Query Manager page without needing to navigate to it.
11.	<b>End of Procedure.</b>

# Training Guide

## Financials Query

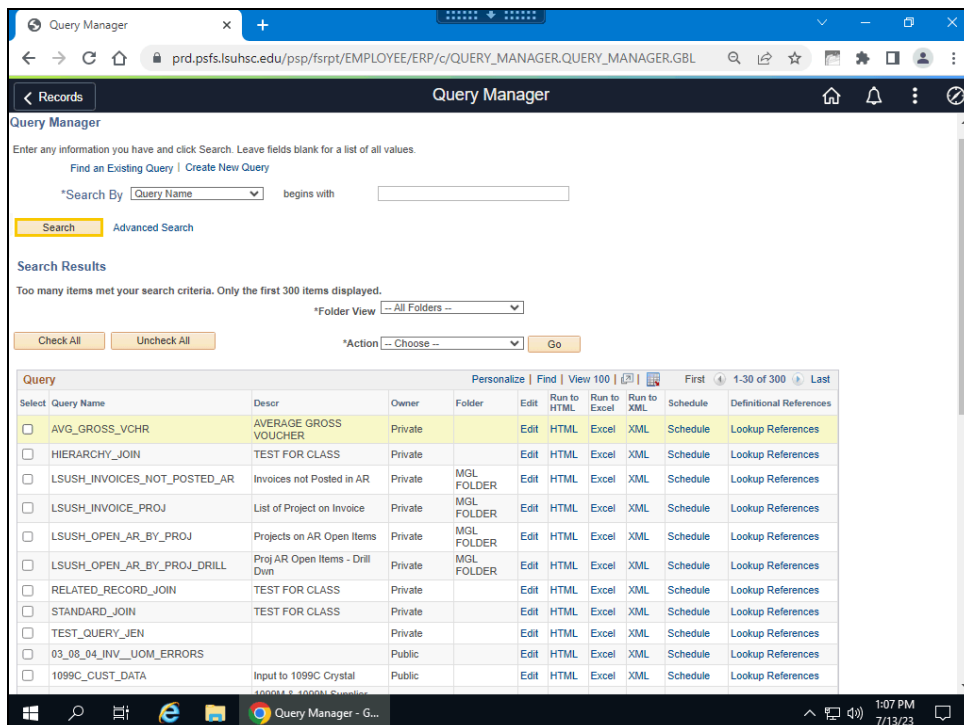
### Copy a Query to Another User

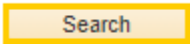

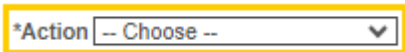

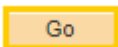
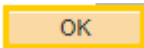
#### Procedure

#### Topic Objectives:

1. Select a query to copy to another user
  - a. Introduce steps to copy a query to another user

Step	Action
1.	<p>Security access permitting, users may select the following from the Action drop-down menu:</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>NOTE: Only Private queries may be Deleted, Copied, Moved, or Renamed. Public queries can be Added to Favorites.</b></p> <p><b>NOTE: The above Actions can only be accessed and performed in Query Manager. These options are not available to users in Query Viewer.</b></p>



Step	Action
2.	Click the <b>Search</b> button. 
3.	You must select the query you wish to copy. You will check the Select box to the left of the Query Name to select the query.  Click the <b>AVG_GROSS_VCHR</b> option. 
4.	Click the button to the right of the <b>Action</b> field. 
5.	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> list item. 
6.	Click the <b>Go</b> button. 
7.	You must enter the user ID of the person to who you will copy the query in <b>ALL CAPS</b> .  For this example, you will use the user ID <b>KOCONN</b> as the user ID.  Enter the desired information into the <b>KOCONN</b> field. Enter " <b>KOCONN</b> ".
8.	Click the <b>OK</b> button. 
9.	This completes <i>Copy a Query to Another User</i> . <b>End of Procedure.</b>

# Training Guide

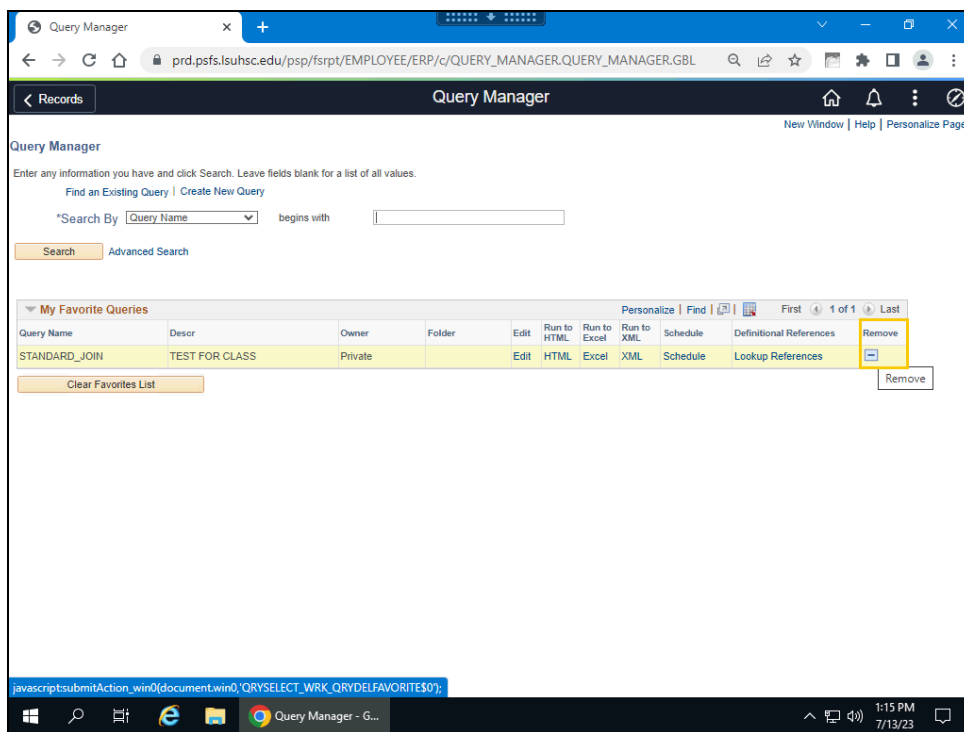
## Financials Query

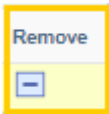
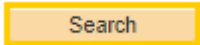

### Clear, Remove and/or Delete a Query

#### Procedure

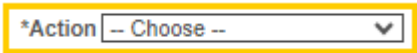
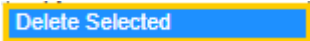
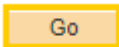
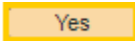
#### Topic Objective:

1. Select a query to remove from My Favorite Queries list
  - a. Introduce steps to remove a query from My Favorite Queries list.
2. Select a query from your private query list to delete from query database
  - a. Introduce steps to delete selected query from Query database



Step	Action
1.	Click the desired object. 
2.	Enter the desired information into the <b>begins with</b> field. Enter " <b>STANDARD</b> ".
3.	Click the <b>Search</b> button. 
4.	Click the <b>STANDARD_JOIN</b> option. 



Step	Action
5.	Click the button to the right of the <b>Action</b> field. 
6.	<b>CAUTIONARY NOTE:</b> <i>Make sure that you only select one private query at a time to delete. Selecting a large number of queries at one time to delete could cause an unintended result.</i>  Click the <b>Delete Selected</b> list item. 
7.	Click the <b>Go</b> button. 
8.	A warning message displays confirming you wish to delete the selected query. Click 'Yes' to delete the query and 'No' to keep the query.  Click the <b>Yes</b> button. 
9.	The query is deleted and you are returned to the Query Manager Search page.
10.	This completes <b>Clear, Remove, and/or Delete a Query</b> . <b>End of Procedure.</b>

# Training Guide

## Financials Query

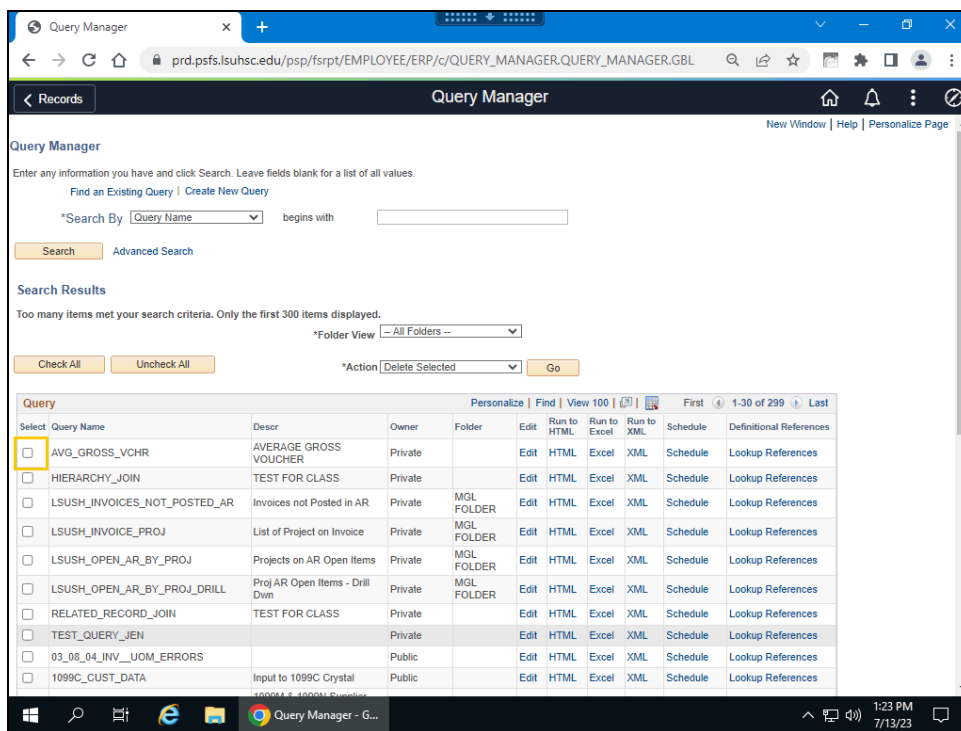
### Rename a Query


#### Procedure



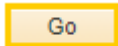
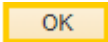
#### Topic Objective:

1. Select a query to rename from your private query list
  - a. Introduce steps to rename a query.

Step	Action
1.	<p>If your security access permits, you can rename your <i>Private</i> queries. In this exercise, you will rename the <b>AVG_GROSS_VCHR</b> query.</p> <p><b>NOTE: The renaming of queries can only be performed in Query Manager.</b></p>



Step	Action
2.	<p>Click the <b>AVG_GROSS_VCHR</b> option.</p> 

Step	Action
3.	Click the button to the right of the <b>Action</b> field. 
4.	Click the <b>Rename Selected</b> list item. 
5.	Click the <b>Go</b> button. 
6.	Enter the desired information into the <b>New Name</b> field. Enter <b>"AVERAGE_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 <b>AVG_GROSS_VCHR</b> to <b>AVERAGE_GROSS_VOUCHER</b> .
9.	This completes <i>Rename a Query</i> . <b>End of Procedure.</b>