Financials
Query 9.2 PT. 8.55

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Financials Query 9.2 PT. 8.55

Introduction to Query

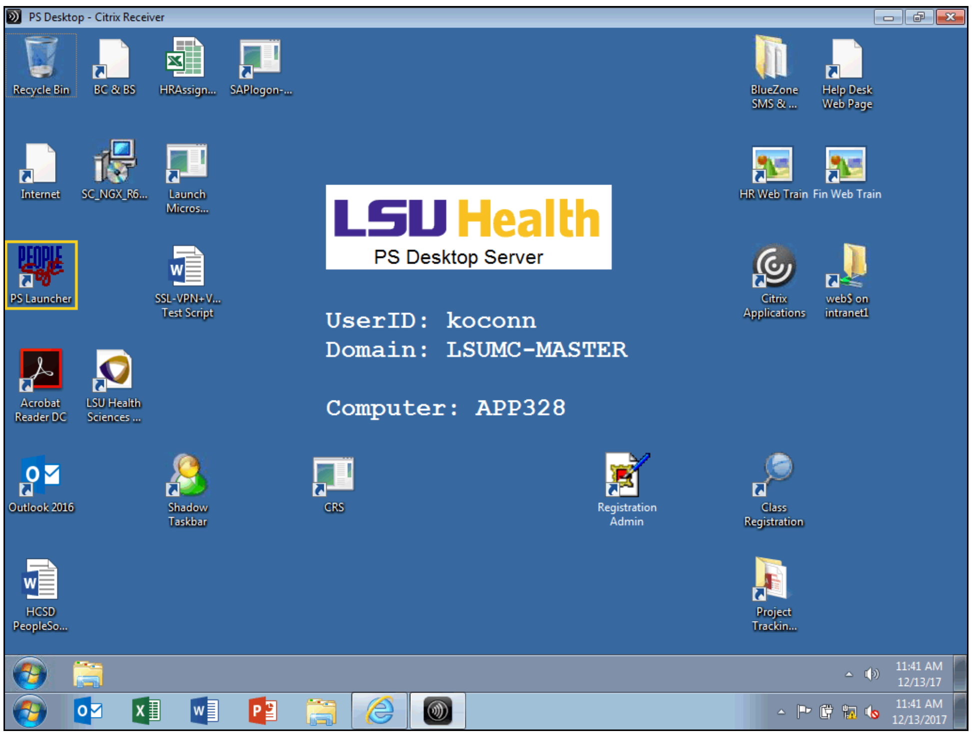
PeopleSoft Query is an end user reporting tool used to retrieve selected data from the Financials database. PeopleSoft 9.2 pt. 8.55 provides query access in the web-based application through the Reporting Tools menu.

NOTE: Query will be accessed using the Reports (PS9FSRPT) database.

Navigate to Query Viewer

Procedure

In this topic you will learn how to **Navigate to Query Viewer**.



Step	Action
1.	Double-click the **PS Launcher** button. 

Step	Action
2.	If the PeopleSoft System is not Financials, click the drop-down button to the right of the field and select it. Click the button to the right of the **Database** field.
3.	Click the **PS 9.2 Financials Reports (PS9FSRPT)** list item. PS 9.2 Financials Reports (PS9FSRPT)
4.	Click the **Start** button. Start
5.	Anytime you enter a non-production database (RPT, SND, TRN, etc.), a warning message displays reminding you any information entered into the database will be lost. Click the desired object. Yes
6.	Click the **Main Menu** button. Main Menu
7.	Click the **Reporting Tools** menu. Reporting Tools
8.	Click the **Query** menu. Query
9.	Click the **Query Viewer** menu. Query Viewer
10.	The Query Viewer search page displays. From the Query Viewer search page you can: • Search and run existing public or private queries, and/or • Add a query to Query Favorites or run a Query from the Query Favorites list.
11.	This completes ***Navigate to Query Viewer***. **End of Procedure.**

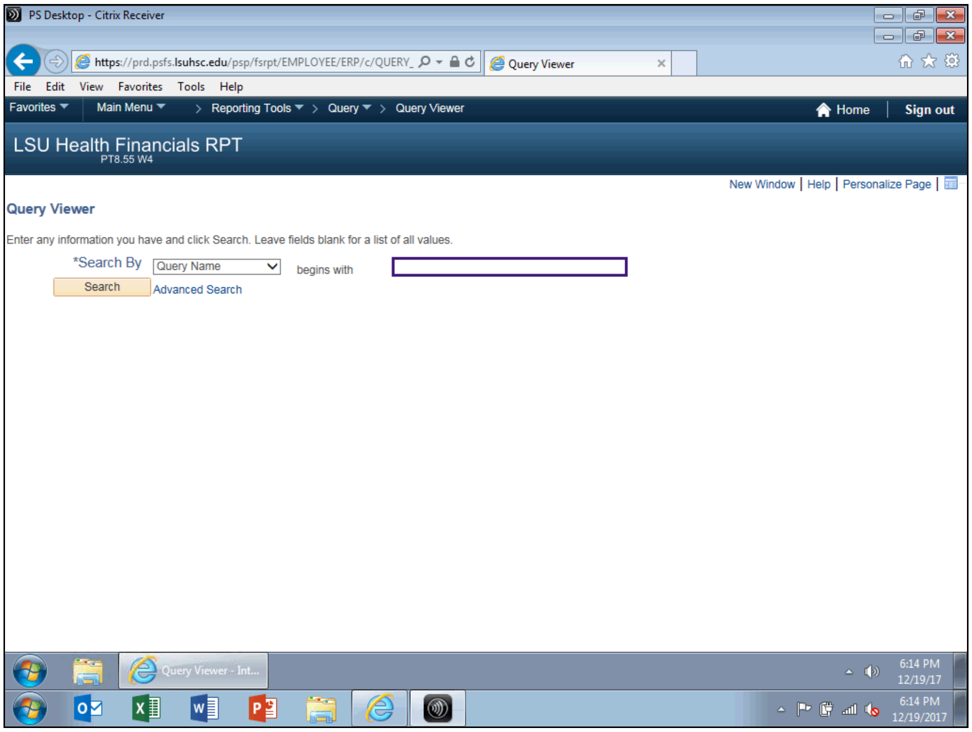
Exercise 1

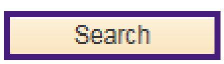
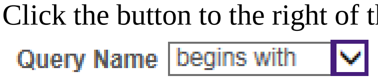
Run a Predefined Query to Query Viewer

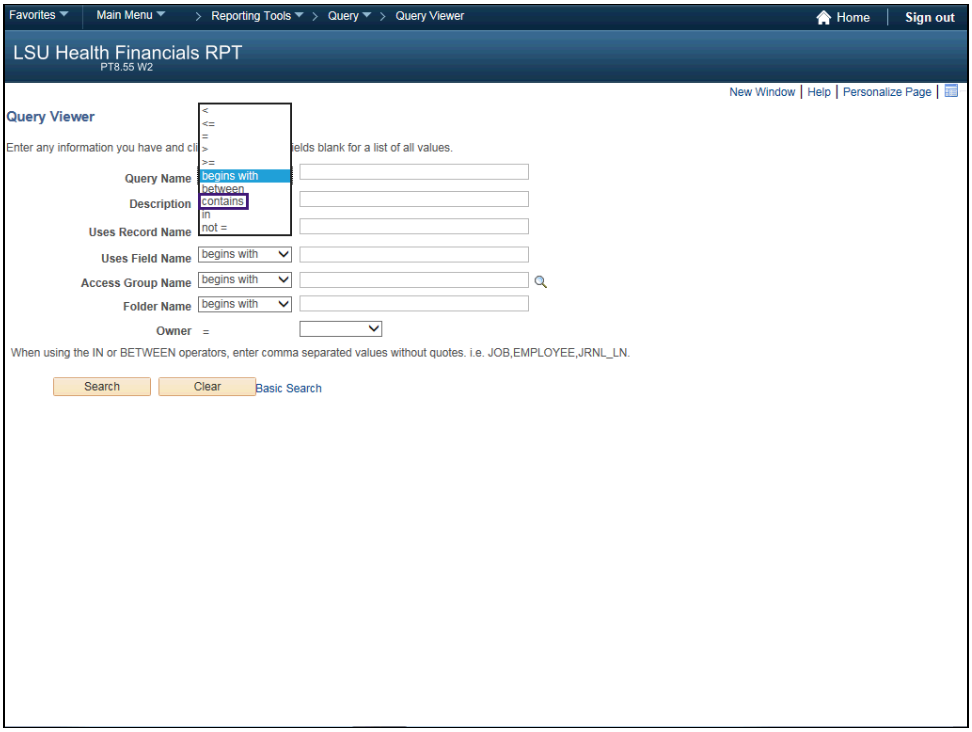
Procedure

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

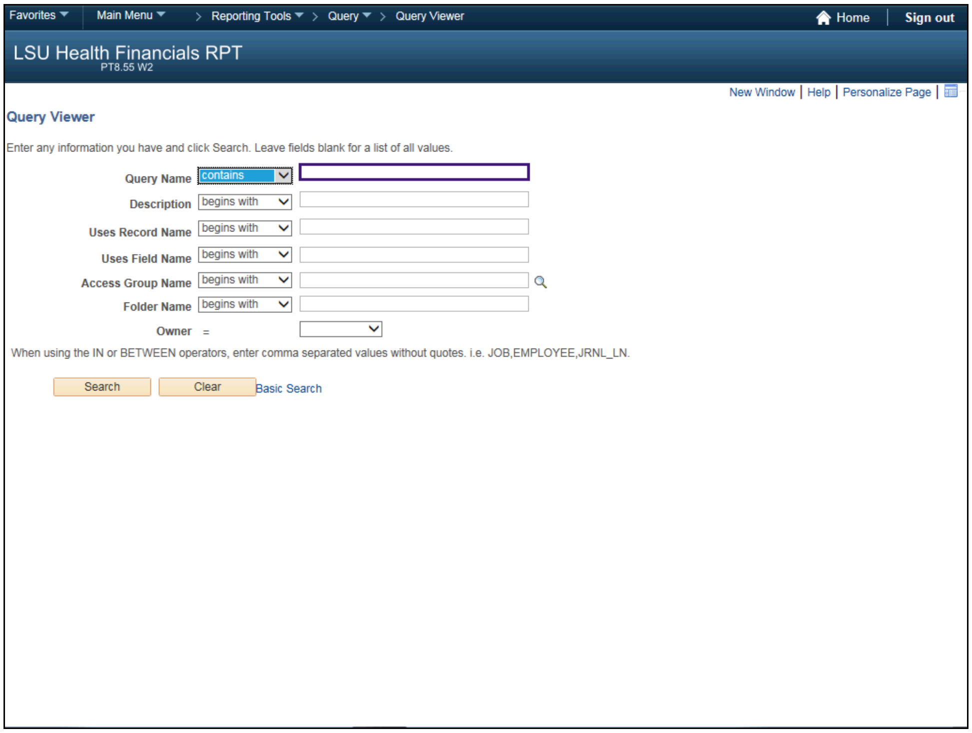
Step	Action
1.	**Scenario** In this example, you will run the **APY3001 _AP_VENDOR_SUMMARY** query to retrieve a list of approved vendors.
2.	You can access existing, predefined queries (Public and/or Private) from the Query Viewer page. Public queries are available to **all** end users with query access. 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.	You must enter all or part of the query name into the Search By field. The Search By field is **not** case sensitive. You may enter information in upper, lower or mixed case.
4.	The "wildcard" can be utilized to focus your search. **The wildcard is a percent (%) sign.** The wildcard may be placed before, in the middle, at the end, or bracket the query name. For example: 1. If the wildcard is placed at the end of the query name, APY%, the system will retrieve query names that begin in APY. 2. If the wildcard is placed in the middle of the query name, %APY%AP, the system will retrieve query names that contain APY somewhere in the name and ends with AP. 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.

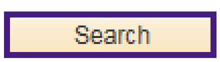


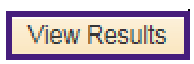
Step	Action
5.	Enter the desired information into the **begins with** field. Enter "**APY%**". 
6.	Click the **Search** button. 
7.	The system retrieves a list of query names that begins with APY. A total of 104 results were retrieved, with the first 30 displaying at the bottom of the page.
8.	The '*begins with'* operand cannot be changed on the Query View page, but can be changed using the *Advanced Search* link. The *Advanced Search* link offers an alternative method of retrieving information. Click the **Advanced Search** link. 
9.	Click the button to the right of the **Query Name** field. 

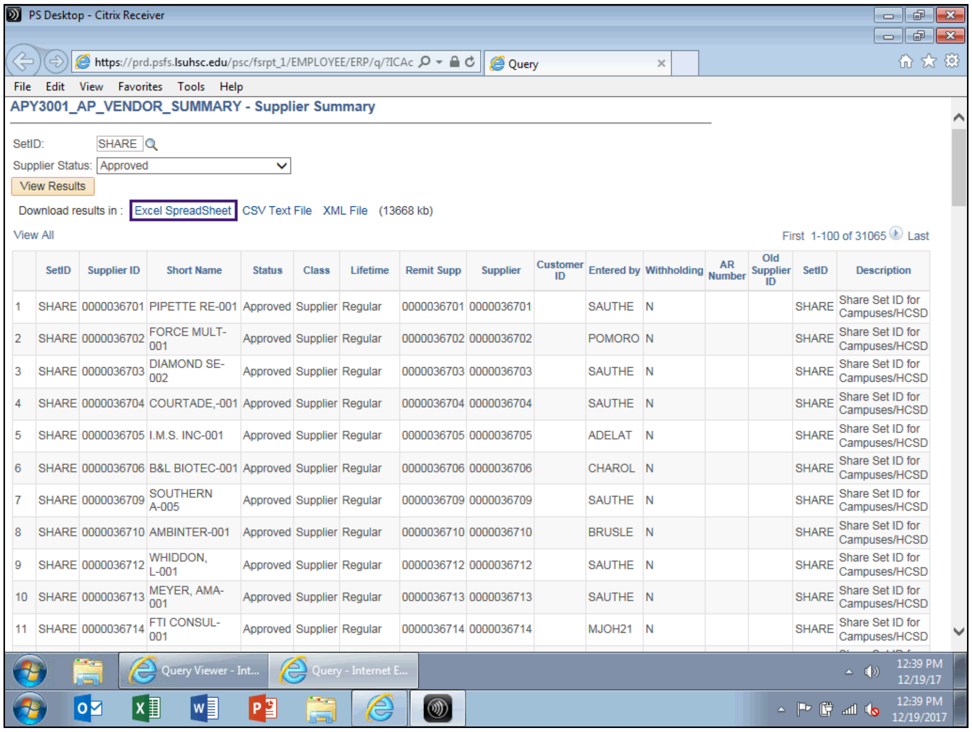


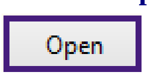
Step	Action
10.	Click the **contains** list item. contains



Step	Action
11.	Enter the desired information into the **Query Name** field. Enter "**APY**". 
12.	Click the **Search** button. 
13.	A total of 109 options were returned using the *Advanced Search* method. Click the **View 100** link. 
14.	Scroll down through the list of queries to find the **APY3001_AP_VENDOR_SUMMARY** query. Click the **Down** button of the scrollbar. 
15.	Query results can be displayed in two formats: **HTML** and **Excel**. Both options will be demonstrated in this example, beginning with the HTML option. ***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.***

Step	Action
16.	Click the **HTML** link. ***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 <u>all</u> available results.*** 
17.	Enter the desired information into the **SetID** field. Enter "**SHARE**". 
18.	Click the button to the right of the **Supplier Status** field. 
19.	Click the **Approved** list item. 
20.	Click the **View Results** button. ***NOTE: A list of approved suppliers will be retrieved and displayed below the View Results button.*** 
21.	The total number of approved suppliers retrieved displays above the *Description* column. In this example, 31,065 suppliers were retrieved. The first 100 suppliers are displayed in ascending order by Supplier ID number. ***NOTE: The number of approved suppliers will vary as new suppliers are added or existing suppliers are unapproved.***
22.	The **arrows** allow you to navigate from page to page. The right arrow allows you to view the next 100 suppliers. The **Last** link allows you to view the last 100 suppliers. The left arrow allows you the view the previous 100 suppliers, and the **First** link displays the first 100 suppliers.
23.	The View All link displays all 31,065 suppliers at one time. ***NOTE: It may take a few minutes to process your request when you search has retrieved a large number of results. The Processing indicator will display in the top right corner of the page.***



Step	Action
24.	*HTML* results can be downloaded to an *Excel* spreadsheet. Downloading results to an *Excel* spreadsheet will allow you to manipulate the data, move columns, hide columns, etc. Click the **Excel Spreadsheet** link. This will open a new window. 
25.	Click the **Open** button. 
26.	If you want to change column widths, sort data, add formulas, or utilize other features available in Excel, you must enable editing for your spreadsheet. Click the **Enable Editing** button. 
27.	You may save the query results to a network drive for later use, or you may print the results. Click the **Close Report** button. 

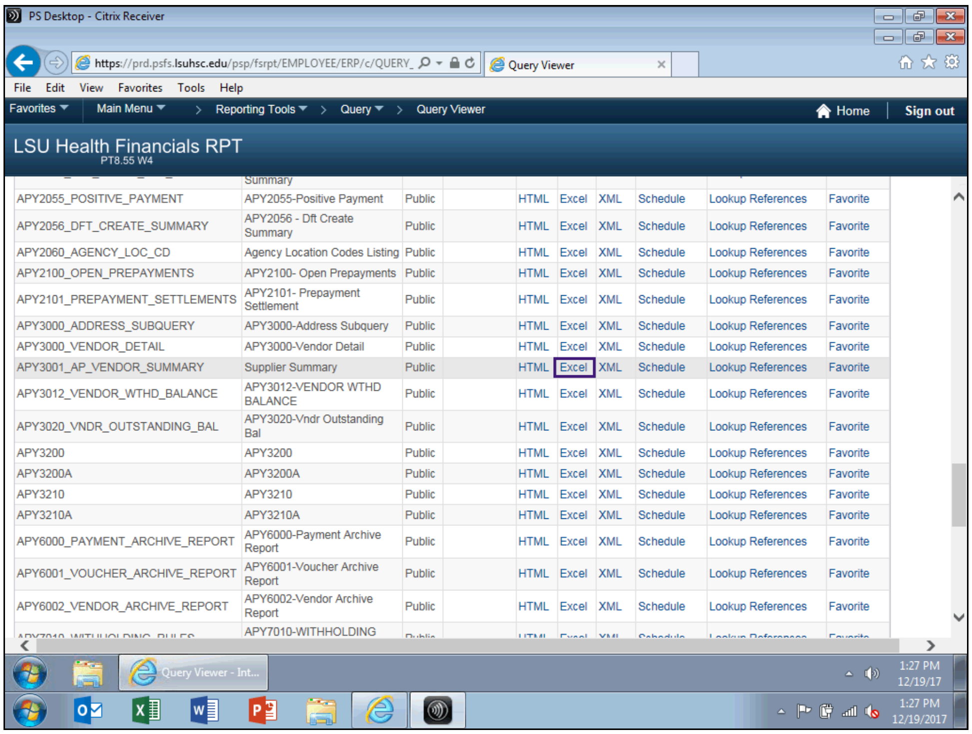
Step	Action
28.	CSV is an abbreviation for Comma Separated Value file. This type of file is not generally used by end users, but is available. XML File is not available for general use. Click the **Close Tab** button. 
29.	This completes ***Run a Predefined Query to Query Viewer***. **End of Procedure.**

Exercise 2

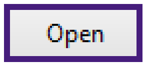
Run a Predefined Query to Excel from Query Viewer

Procedure

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



Step	Action
1.	From the search list results in the navigation *Reporting Tools* > *Query* > *Query Viewer*, click the **APY3001_AP_VENDOR_SUMMARY Excel** link. Excel
2.	Enter the desired information into the **SetID** field. Enter "**SHARE**".
3.	Click the button to the right of the **Supplier Status** field.
4.	Click the **Approved** list item. Approved
5.	Click the **View Results** button. View Results

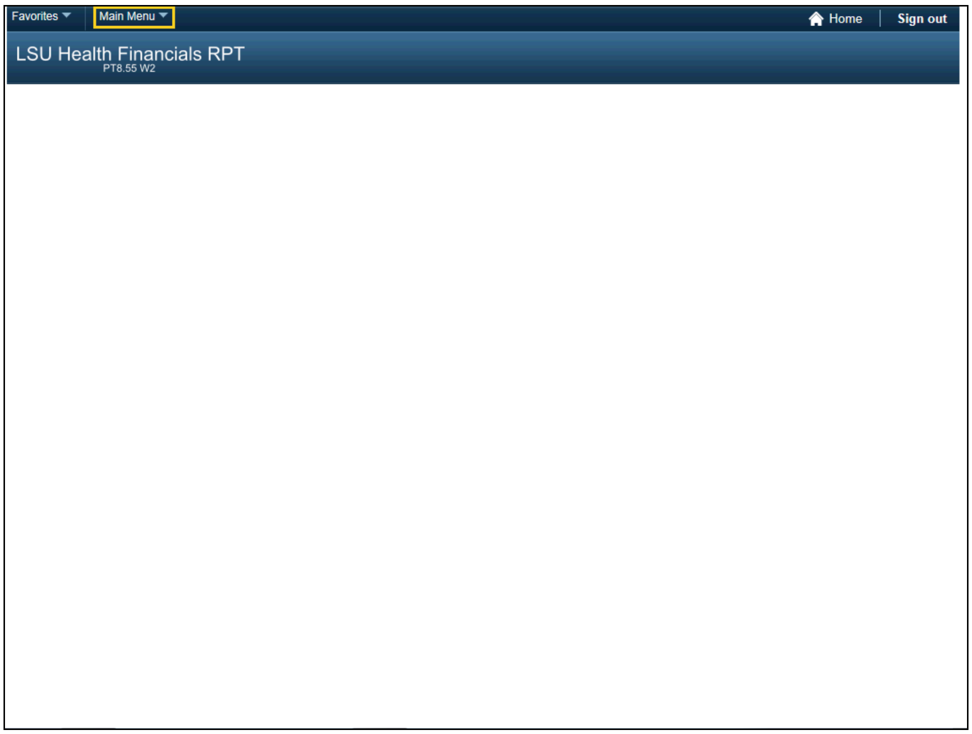
Step	Action
6.	Click the **Open** button. 
7.	If you want to change column widths, sort data, add formulas, or utilize other features available in Excel, you must enable editing for your spreadsheet. Click the **Enable Editing** button. 
8.	You may save the query results to a network drive for later use, or you may print the results. Click the **Close Report** button. 
9.	Click the **Close Tab** button. 
10.	This completes ***Run a Predefined Query to Excel***. **End of Procedure.**

Exercise 3

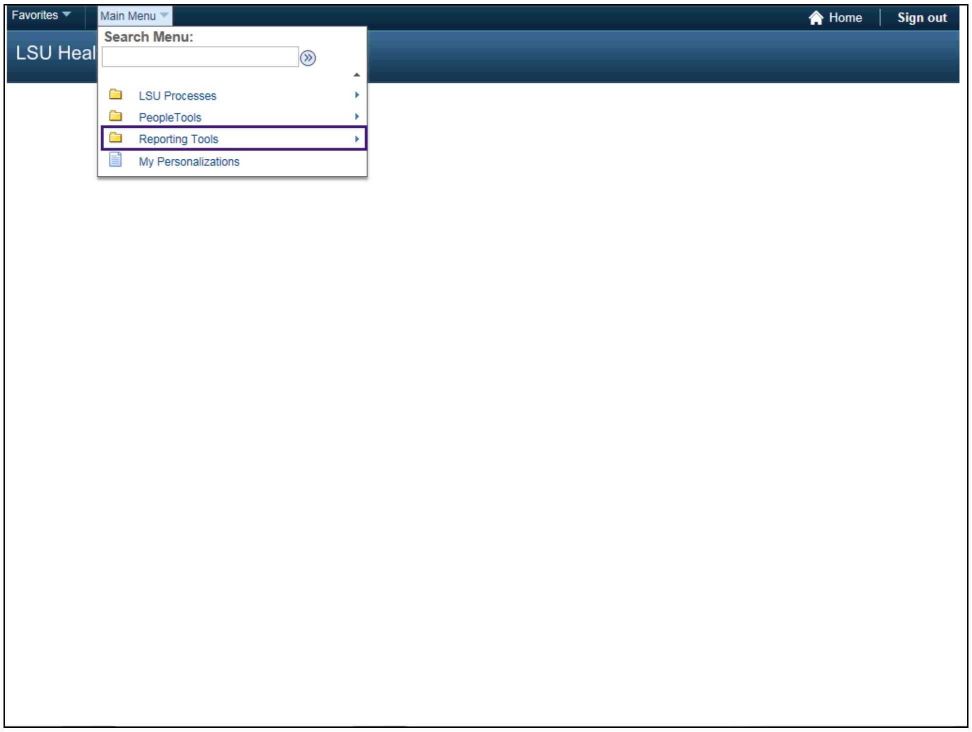
Create and Format a Query

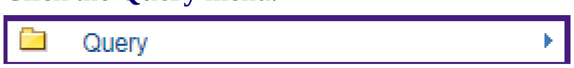
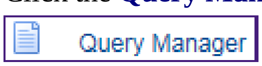
Procedure

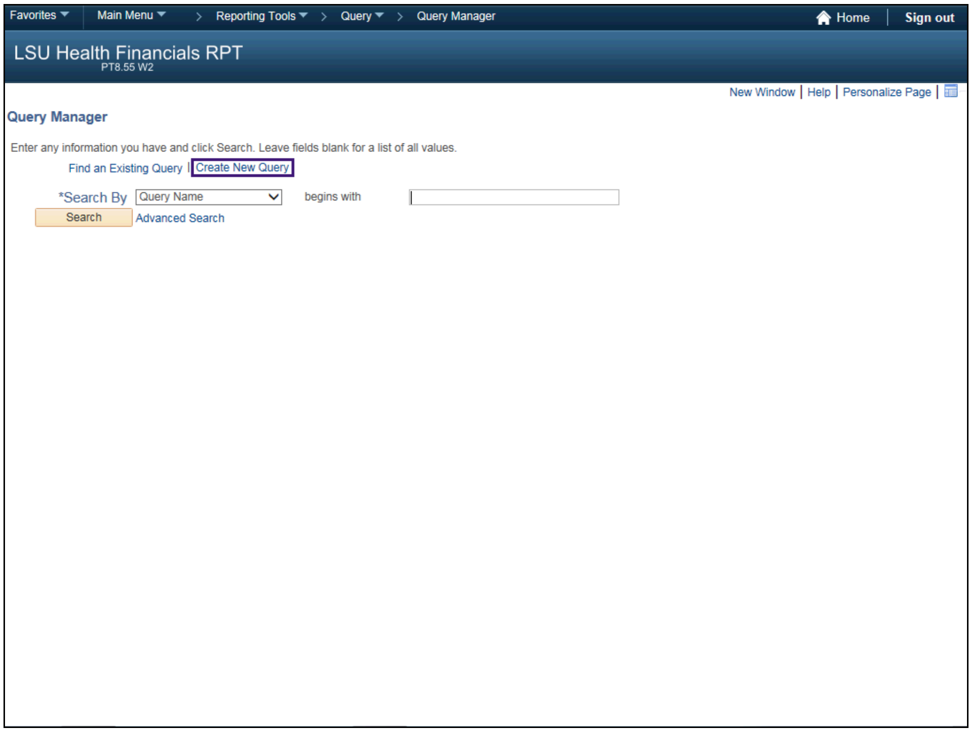
In this topic you will learn how to **Create and Format a Query**.



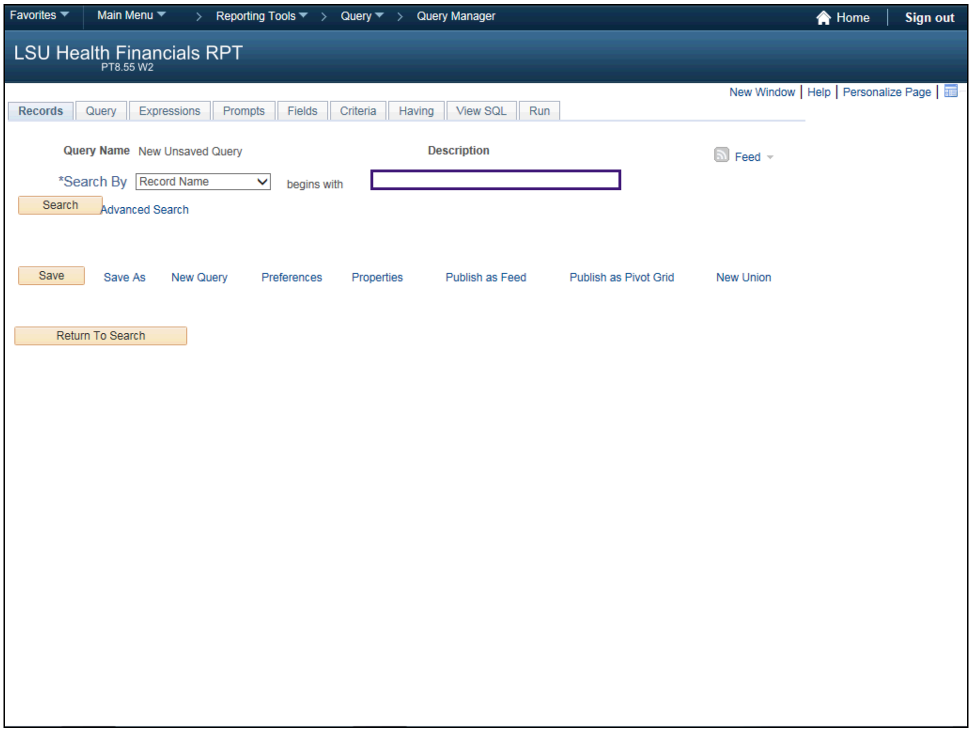
Step	Action
1.	Click the **Main Menu** button. 



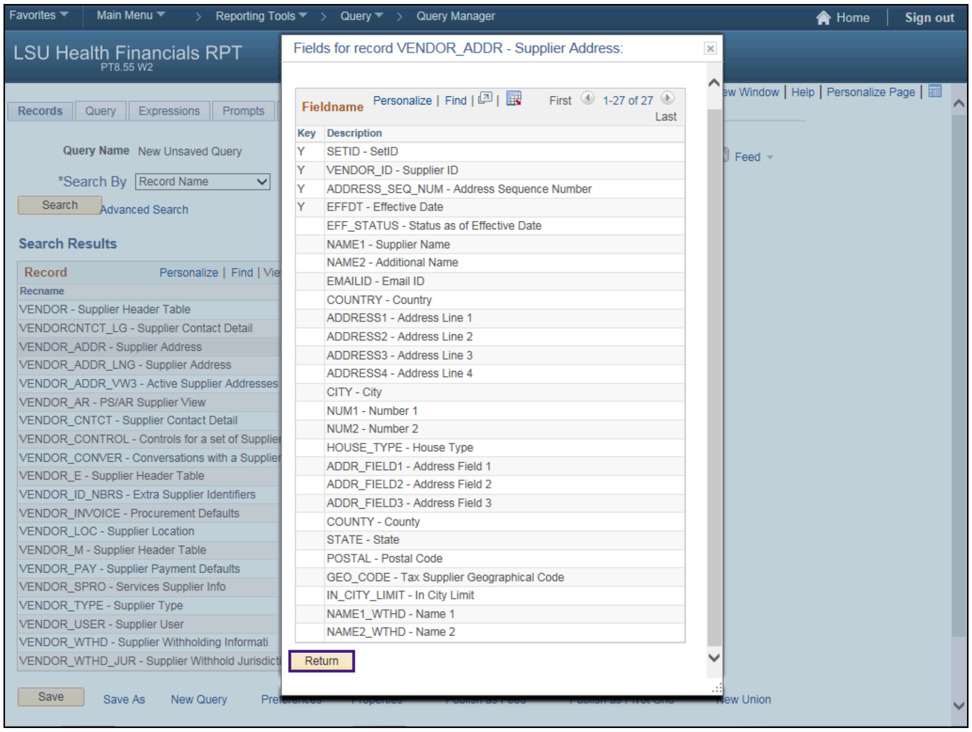
Step	Action
2.	Click the **Reporting Tools** menu. 
3.	Click the **Query** menu. 
4.	Click the **Query Manager** menu. 

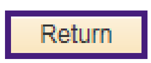


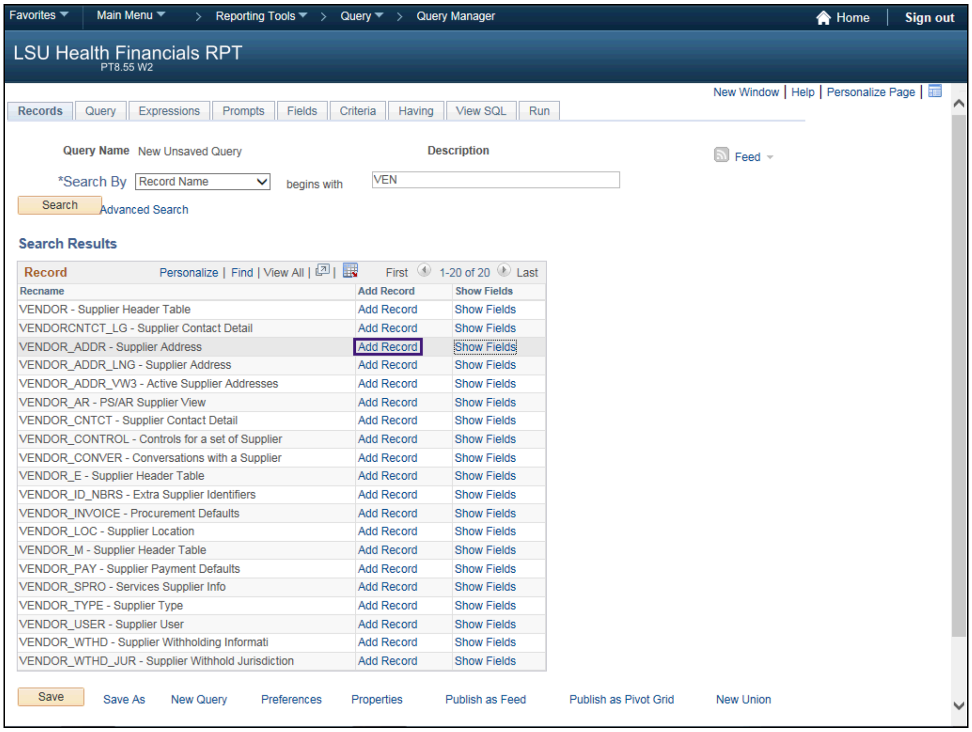
Step	Action
5.	Click the **Create New Query** link. 
6.	The *Find an Existing Record* page displays. Across the top of the page are nine tabs that can be used in creating or amending a query. The system *defaults* you onto the **Records** tab.
7.	PeopleSoft stores the data entered into the system in tables. The tables are comprised of *rows (records)* and *columns (fields)*. You will select the various *rows (records)* and *columns (fields)* you want the system to retrieve to create your query. When 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).



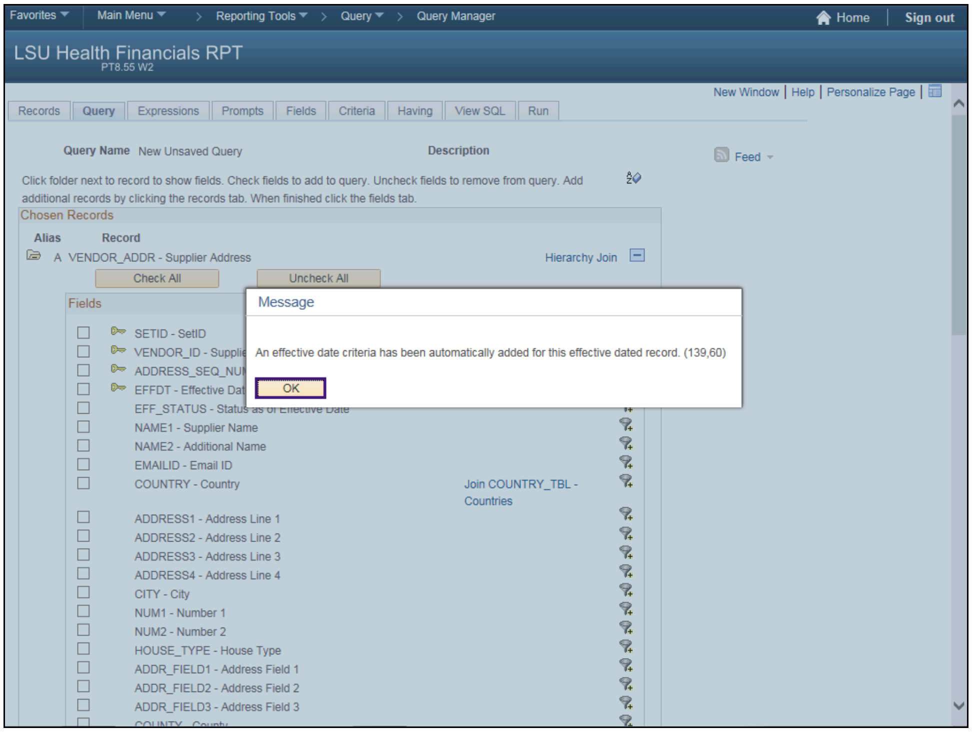
Step	Action
8.	You start by selecting a record. Since you are interested in generating a list of vendor information, it makes sense to first determine what vendor tables (vendor records) are available. You must enter all or part of the Record Name into the Search By field. The wildcard (%) or the Advanced Search link may be utilized to help focus your search. Enter the desired information into the **begins with** field. Enter "**VEN**". begins with
9.	Click the **Search** button. Search
10.	A list of 20 record options display. If you are unsure of which record to use, you can click a record's Show Fields link to view the fields that comprise the record. Click the **Show Fields** link. Show Fields



Step	Action
11.	A list of fields displays for your review. 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. Click the **Return** button. 



Step	Action
12.	For this example, the **VENDOR_ADDR - Supplier Address** record will be used. ***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.*** Click the **Add Record** link. 



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>13.</td><td>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.

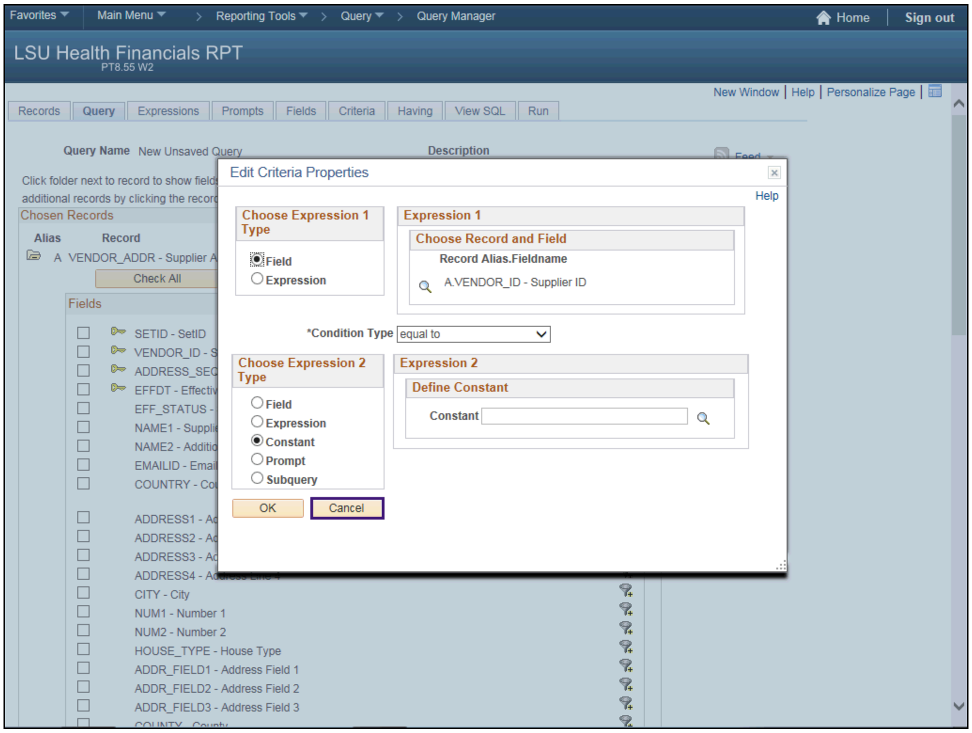
Click the OK button.
</td></tr>
<tr><td>14.</td><td>The system takes you to the Query tab.

From the Query tab you can select individual fields within a record. The fields you select will display as the columns on your report.</td></tr>
<tr><td>15.</td><td>Field names do no default in alphabetical order. The system provides a Sort fields alphabetically option to make searching for fields easier.

Click the Sort fields alphabetically button.
</td></tr>
<tr><td>16.</td><td>The fields display in alphabetical order. By clicking the Sort fields alphabetically button again, the system returns the fields to the original order.

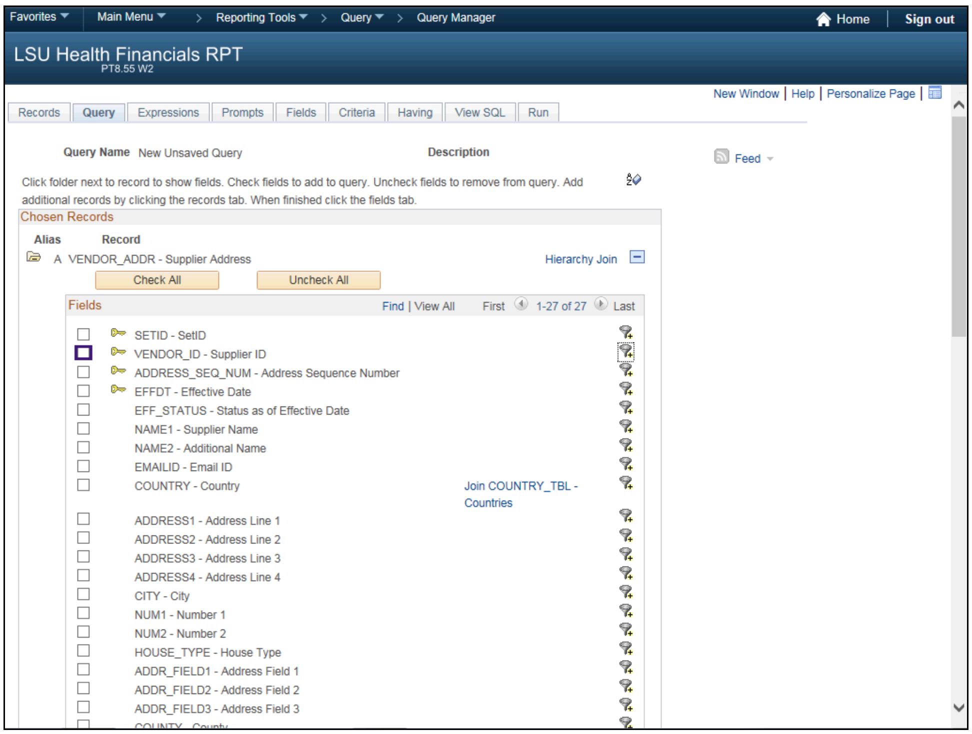
Click the Sort fields alphabetically button.
</td></tr>
</table>

Step	Action
17.	The Check All button is used if you want to use all the fields associated with the record in your query. Click the **Check All** button. 
18.	The Uncheck All button deselects all of the fields associated with the record. Click the **Uncheck All** button. 
19.	When a field is selected for use in the query, and the query is run, the system returns **all** the data for the field. You can narrow your results by specifying criteria for the field. The *Use as Criteria (funnel)* option allows you to add criteria for a particular field. 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. Click the **Use as Criteria** button. 



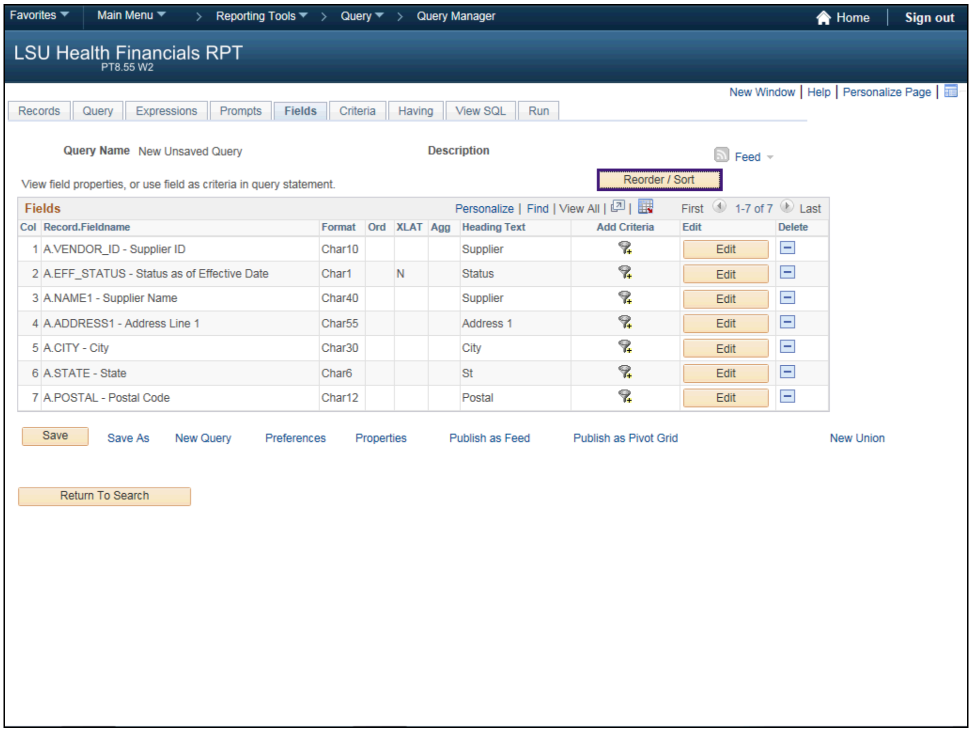
Step	Action
20.	From the Edit Criteria Properties page, you can Choose Expression, Choose Record or Field, or Define Constant. ***NOTE: See Exercise 4 for information on the Using as Criteria feature.*** Click the **Cancel** button. 
21.	**Joins** are used when creating queries using more than one record. Joins allow you to retrieve data from multiple tables, but present it as if it came from one table. Three types of joins are used by LSUHSC in PeopleSoft: *Hierarchy Join, Standard (Any) Join, and Related Record Join.* ***NOTE: Joins are <u>not</u> used when creating a single record query.*** ***NOTE: See Exercise 5 - Hierarchy Joins for additional information.***
22.	**Key symbols** identify fields found in multiple records. Key fields provide a link when joining multiple records.

Step	Action
23.	**Selecting Fields** Select a field by clicking the checkbox to the left of the Field Name. For this example the following fields will be selected: **Vendor ID**, **Effective Status**, **Name1**, **Address1**, **City**, **State**, and **Postal**.



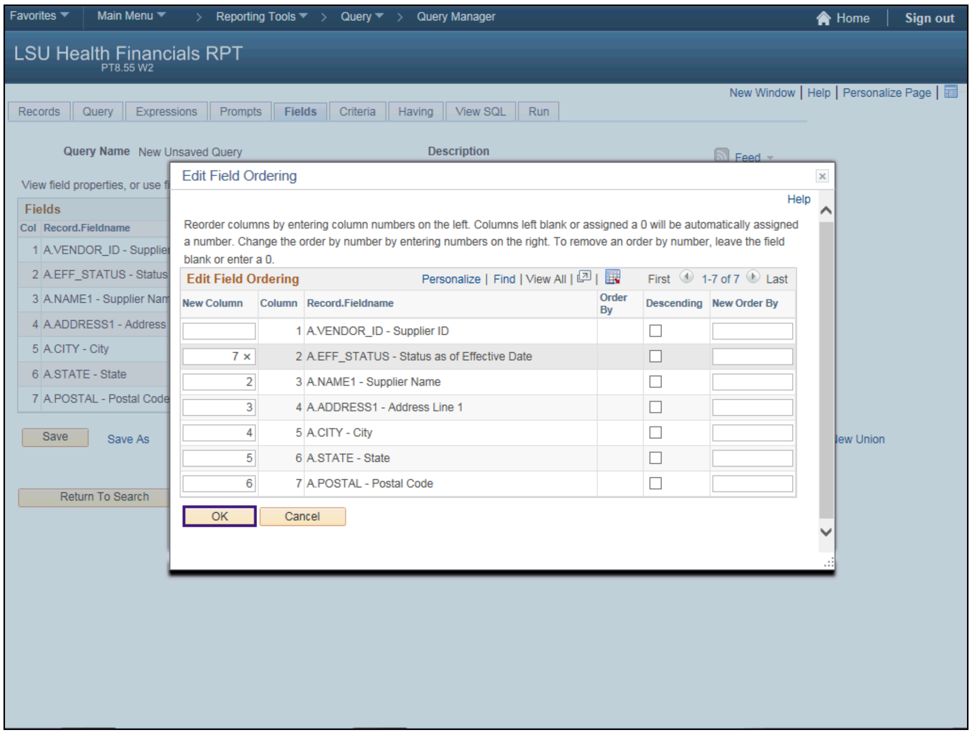
Step	Action
24.	Click the **VENDOR_1 - Supplier ID** option.
25.	Click the **ADDRESS 1 - Address Line 1** option.
26.	Click the **CITY - City** option.
27.	Click the **Eff_Status - Status as of Effective Date** option.
28.	Click the **Name1 - Supplier Name** option.

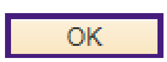
Step	Action
29.	Double-click the **Down** button of the scrollbar. 
30.	Click the **Postal** option. 
31.	Click the **STATE - State** option. 
32.	Click the **Up** button of the scrollbar. 
33.	After all fields have been selected, click the Fields tab to view the selected fields collectively. Click the **Fields** tab. 
34.	The fields display on the Fields tab in the **order** in which they were **selected**. Each **field** represents a **column** on your spreadsheet, so this also the order they will display in your report. Often fields will need to be reordered to make query results easier to read. ***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, no matter in what order the individual fields were selected.***
35.	***NOTE: It is recommended the query be saved when any changes are made. The Save As option will be used when first saving your query so that a name can be assigned.*** For **training purposes only**, you will forgo saving the query at this time.

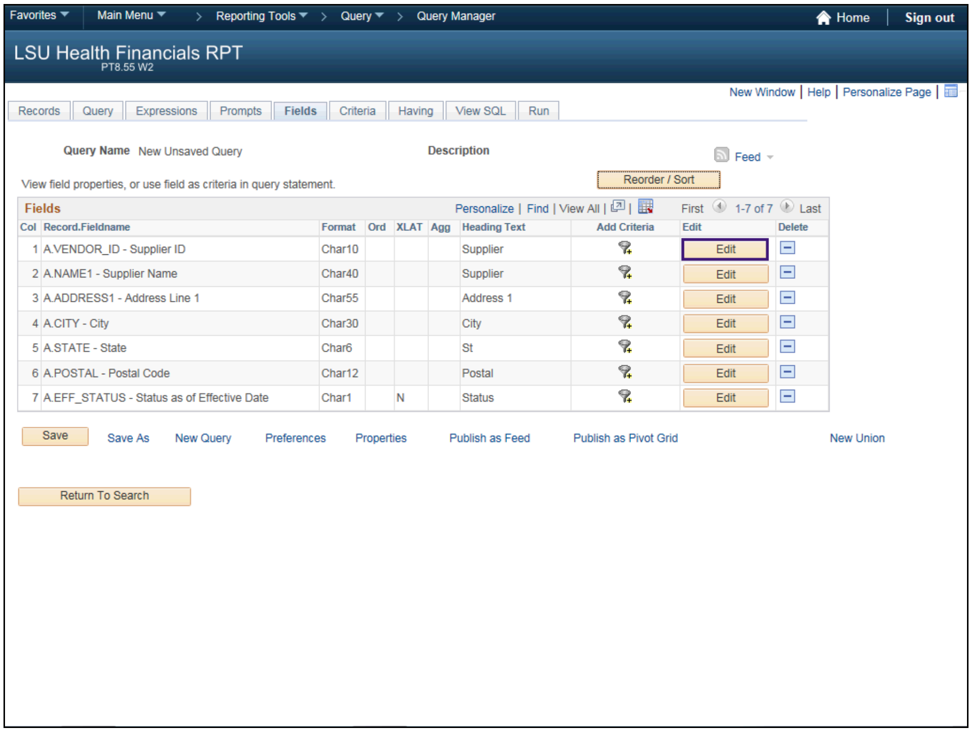


Step	Action
36.	The *Reorder/Sort* button allows you to change the order of the fields and, therefore, the order of your query result columns. Click the **Reorder / Sort** button. 
37.	You will use the *New Column* fields, on the left side of the table, to *change the order of your columns*. The *New Order By* column, on the right side of the table, will be used to *sort your data*. VENDOR_ID will **remain** as column 1, so you will **not** need to make an entry for this field.
38.	Reorder columns by entering the column number in the New Column field. If a field is left blank, that column will remain as originally indicated. In this example, NAME1 is the third (3rd) column on your query results. Change NAME1 to column two (2). Enter the desired information into the **New Column NAME1 - Supplier Name** field. Enter "**2**".
39.	Enter the desired information into the **New Column ADDRESS1 - Address Line 1** field. Enter "**3**".
40.	Enter the desired information into the **New Column CITY - City** field. Enter "**4**".
41.	Enter the desired information into the **New Column - STATE - State** field. Enter "**5**".

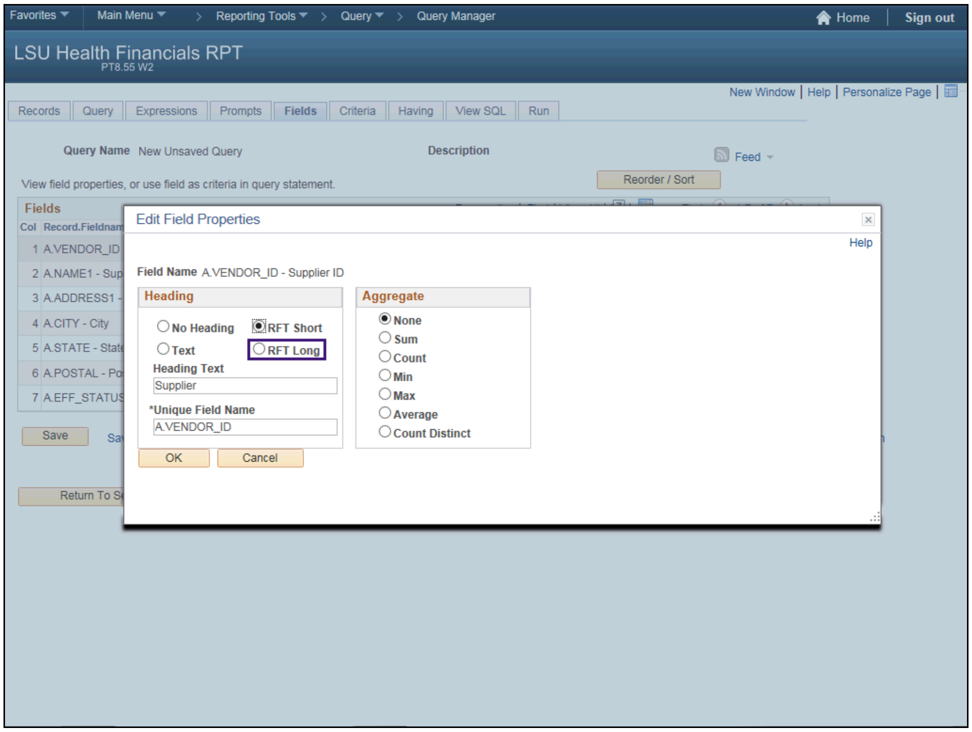
Step	Action
42.	Enter the desired information into the **New Column - POSTAL** field. Enter "**6**".
43.	Enter the desired information into the **New Column - EFF_STATUS - Status as of Effective Date** field. Enter "**7**".



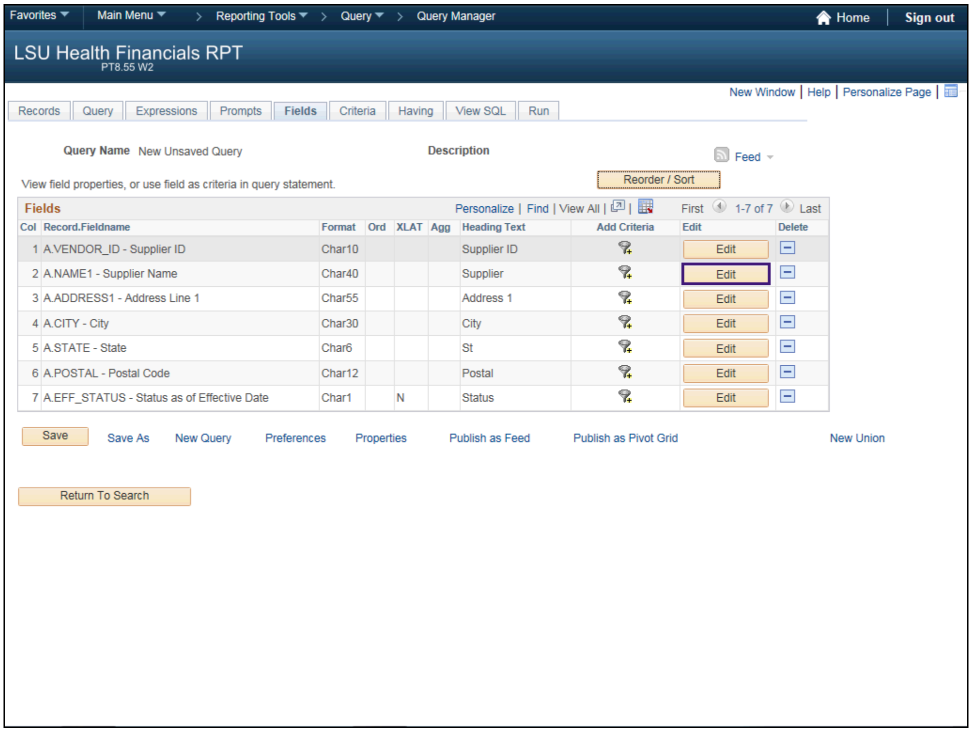
Step	Action
44.	Click the **OK** button. 
45.	The Fields are reordered based on the changes you made on the Reorder/Sort panel.
46.	The *Heading Text* displays the text used for each field (column) on your report. Field titles can be changed using the Edit feature.



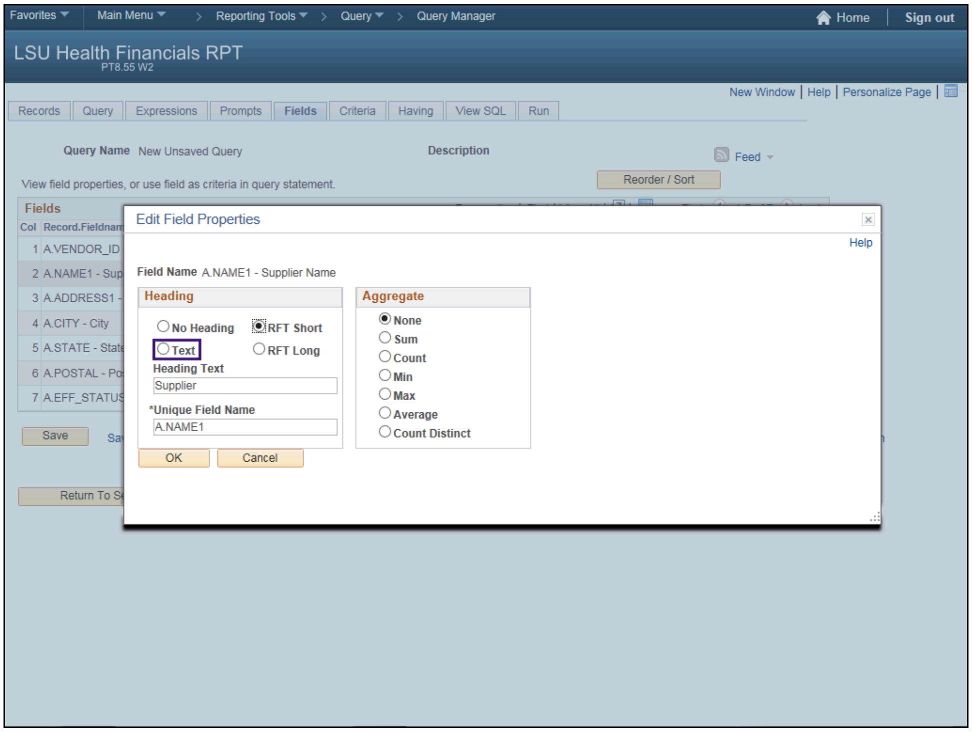
Step	Action
47.	In this example you will change the VENDOR_ID Heading Text from Supplier to Supplier ID. Click the **VENDOR_ID - Supplier ID Edit** button. 
48.	The system defaults to **RFT Short** (Record Field Text Short). The RFT Short column title will be up to 10-characters long. ***NOTE: The Heading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



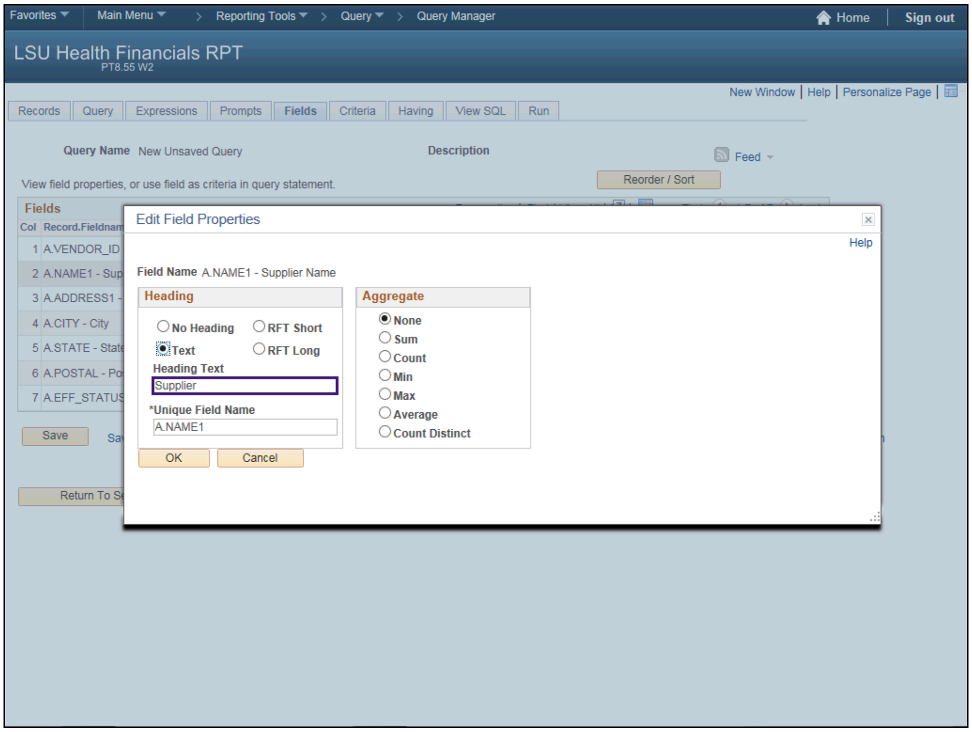
Step	Action
49.	Click the **RFT Long** option. 
50.	***NOTE: The Unique Name Field will always remain as defaulted.*** Click the **OK** button. 
51.	The Heading Text for the VENDOR_ID field has changed from Supplier to Supplier ID.



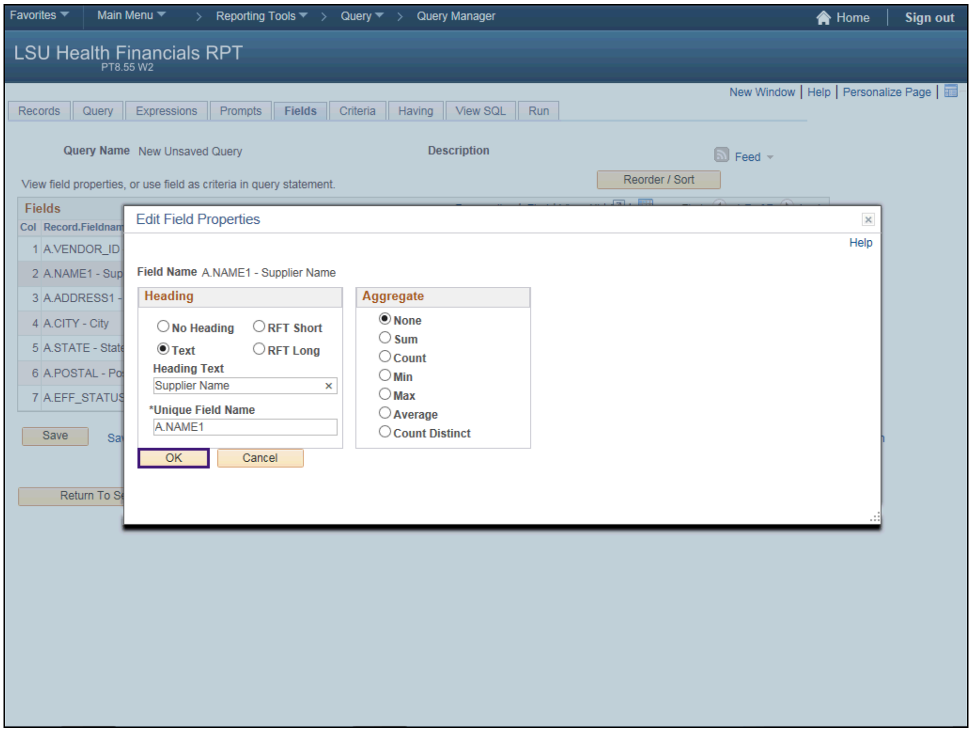
Step	Action
52.	Click the **NAME1 - Supplier Name Edit** button. 



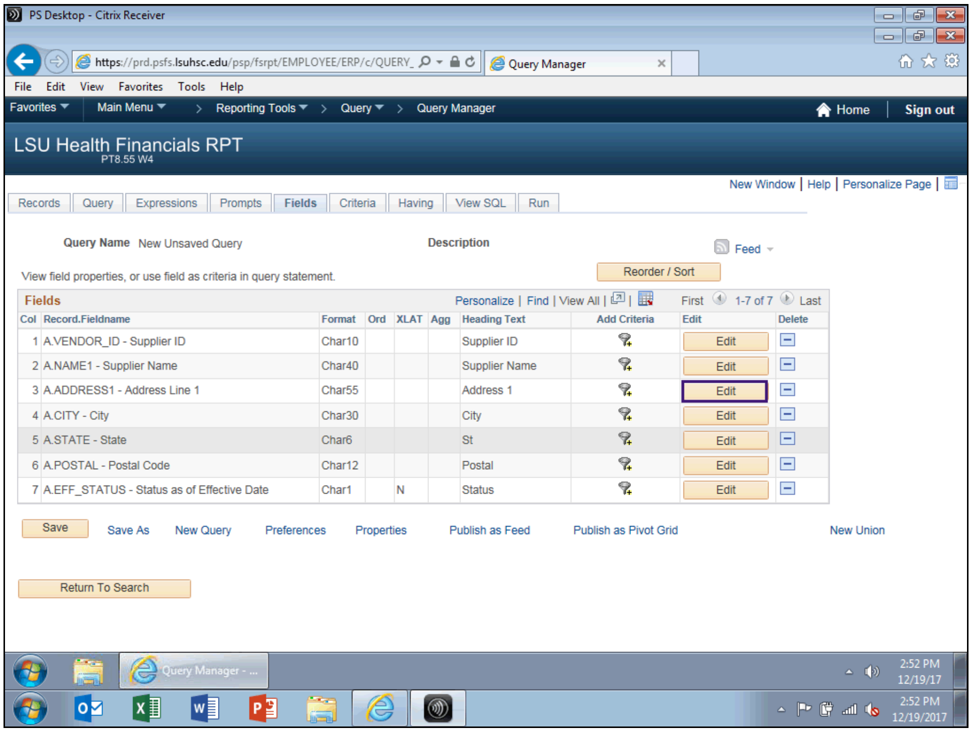
Step	Action
53.	Click the **Text** option. 



Step	Action
54.	Enter the desired information into the **Heading Text** field. Enter "**Supplier Name**". 



Step	Action
55.	Click the **OK** button. 

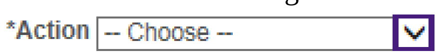


Step	Action
56.	Click the **Address 1 - Address Line 1 Edit** button. Edit
57.	Click the **Text** option. Text
58.	Enter the desired information into the **Heading Text** field. Enter "**Address**". Heading Text Address 1
59.	Click the **OK** button. OK
60.	Click the **STATE - State Edit** button. Edit
61.	Click the **RFT Long** option. RFT Long
62.	Click the **OK** button. OK

Step	Action
63.	Click the **Save As** link. 
64.	When you save the query the first time, you will name your query. Any queries you create **must** be saved as a Private query. If you modify a Public query, and wish to save the changes, you **must** save the query as a Private query.
65.	**Query** names **must** be entered in ALL CAPS. Names can be up to thirty (30) characters long. No spaces or special characters (e.g., #, $, &, etc.) may be used in the name. An underscore can be used to separate words used in the query name. Enter the desired information into the **Query** field. Enter "**SUPPLIER_LIST**". 
66.	A **Description** may be added. The **Description** can be up to thirty (30) characters long and is not case sensitive. Enter the desired information into the **Description** field. Enter "**SUPPLIER ADDRESS LIST**". 
67.	The **Folder** field is not used. The **Query Type** is always User. The **Owner** option defaults to Private and will remain as defaulted, so that your query cannot accidentally be saved as a Public query.
68.	The **Query Definition** box is used to enter a longer description of the query. The use of Query Definition is *optional* but recommended. You can also enter the date you created your query in the Query Definition box. Enter the desired information into the **Query Definition** field. Enter "**DATE CREATED**".
69.	Click the **OK** button. 
70.	The **Run** tab allows you to preview your query. Click the **Run** tab. 
71.	The query results display in HTML format. Data **cannot** be manipulated in HTML format. You can download the results to an Excel spreadsheet if you wish to make changes to the query results in a spreadsheet. Examples would be filtering data, grouping, or performing subtotals.
72.	The first 100 options of your query results display. You can use the arrows to move between pages, or use the First or Last links to view additional results.

Step	Action
73.	Click the **Fields** tab. Fields
74.	A value in the **XLAT** column indicates a **Translate Value** may be used. The Translate Value is an abbreviated code for a field description.
75.	In this example, the EFF_STATUS has a XLAT value of 'N'. The XLAT column can contain one of the following values: **N (None) -** Displays in the query results as a *single character* value and assumes a current date logic (i.e., Effective Date is equal to current date); **S (Short) -** Displays in field description in the query results as a *10-character value* and uses a specific effective date logic (i.e., Effective Date is equal to or less that current date); or **L (Long) -** Displays the field description in the query results as a *30-character value* and uses a specified effective date (i.e., Effective Date is equal to or less than current date).
76.	In this example, the **XLAT** value for the Effective Status field is '**N**', so the value displayed in the query results for the column will display as a *single letter* in your query results: **A** = Active or **I** = Inactive
77.	Click the **EFF_STATUS - Status as of Effective Date Edit** button. Edit
78.	Click the **Long** option. Long
79.	Click the **OK** button. OK
80.	The **EFF_STATUS** field now displays an '**L**' in the **XLAT** column. By changing the Translate Value from 'N' to 'L', the query results will display 'Active or Inactive' instead of 'A or I' in the query results Status column.
81.	Click the **Run** tab. Run
82.	The status for each Supplier now displays as '**Active or Inactive**'. Click the **Fields** tab. Fields

Step	Action
83.	Just as you can change the order in which fields (columns) display in your results, you can also sort the data results for multiple fields. Click the **Reorder/Sort** button. Reorder / Sort
84.	If you wish to sort your results in descending order, check the box in the **Descending** checkbox for the desired field. If you select 'Descending', the D1 will display in the *Ord* column on the *Fields* tab to denote results will display in descending order.
85.	Enter the desired information into the **EFF_STATUS - Status as of Effective Date New Order By** field. Enter "**1**".
86.	Click the **OK** button. OK
87.	The **Ord** column now displays a '**1**' for the **EFF_STATUS** field. Your query results will now sort by whether the supplier is Active or Inactive.
88.	Click the **Save** button. Save
89.	Click the **Return to Search** button. Return To Search
90.	Enter the desired information into the **begins with** field. Enter "**SUPPLIER**".
91.	Click the **Search** button. Search
92.	Now that all changes have been made to your query, you will run your query from the Query Manager page. Notice that when searching, any private queries associated with your user id will display first in your search results list. Click the **SUPPLIER_LIST HTML** link. HTML
93.	You can download your results to an **Excel** spreadsheet if you wish to manipulate you query results. Click the **Excel Spreadsheet** link. Excel SpreadSheet
94.	Click the **Open** button. Open

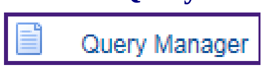
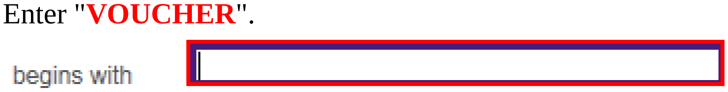
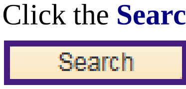
Step	Action
95.	If you want to change column widths, sort data, add formulas, or utilize other features available in Excel, you must enable editing for your spreadsheet. Click the **Enable Editing** button. 
96.	You may save the query results to a network drive for later use, or you may print the results. Click the **Close Report** button. 
97.	Click the **Close Tab** button. 
98.	If desired, you may add the SUPPLIER_LIST query to My Favorite Queries for easy access in the future. Click the **SUPPLIER_LIST** option. 
99.	Click the button to the right of the **Action Down** field. 
100.	Click the **Add to Favorites** list item. ***NOTE: Your security permission will determine the options available in the Actions list.*** 
101.	Click the **Go** button. 
102.	Your query is added to **My Favorite Queries**, which displays at the bottom of the page. When you next navigate to Query, the My Favorite Queries section will display automatically on the Query Manager or Query Viewer Search page. You will not need to use the Search by option to run this query in the future.
103.	Click the **Home** link. 
104.	This completes ***Create and Format a Query***. **End of Procedure.**

Exercise 4

Create a Query using Criteria Components

Procedure

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

Step	Action
1.	Click the **Main Menu** button. 
2.	Click the **Reporting Tools** menu. 
3.	Click the **Query** menu. 
4.	Click the **Query Manager** menu. 
5.	Click the **Create New Query** link. 
6.	Defining criteria allows you to: 1. Reduce the number of data rows returned in your results, and 2. Retrieve only the data you need at the time the query runs.
7.	In this exercise, you will create a query using the **VOUCHER - AP Voucher Header Table** record and the following criteria: 1. **Business Unit** constant = LSUSH; 2. **Invoice Date** between 11/1/17 and 11/30/17; and 3. **Post Status AP** of Posted. ***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.***
8.	Enter the desired information for the **Record Name** into the **begins with** field. Enter "**VOUCHER**". 
9.	Click the **Search** button. 

Step	Action
10.	Click the **VOUCHER - AP Voucher Header Table Add Record** link. 
11.	Click the **BUSINESS_UNIT - Business Unit** option. 
12.	Click the **VOUCHER_ID - Voucher ID** option. 
13.	Click the **INVOICE_DT - Invoice Date** option. 
14.	Click the **OPRID - User ID** option. 
15.	Click the **POST_STATUS_AP - Post Status** option. 
16.	Click the **GROSS_AMT - Gross Invoice Amount** option. 
17.	Click the **Fields** tab. 
18.	You can return to the *Query* tab to *add* or *delete fields*. Fields may be deleted on the Fields tab by clicking the Delete button (-). However, fields cannot be added on the Fields tab.
19.	Click the **Save As** link. ***NOTE: You will name the query the first time you save it. The query <u>must</u> be saved as a Private query. If a Public is modified, you must save the modified query as a Private query*** 
20.	Enter the desired information into the **Query** field. Enter "**AVG_GROSS_VCHR**".
21.	The Description can be up to thirty (30) characters long. Enter the desired information into the **Description** field. Enter "**AVERAGE GROSS VOUCHER**".
22.	Verify that *Owner = Private*. Enter the desired information into the **Query Definition** field. Enter "**DATE CREATED**".

Step	Action
23.	Click the **OK** button. 
24.	You add criteria to a query to filter or limit the results based on specified parameters. There are three (3) methods for adding criteria to a query. Each method will be demonstrated in this topic. The methods are: Method 1 - Add criteria from the **Fields** tab; Method 2 - Add criteria from the **Criteria** tab; and Method 3 - Add criteria from the **Query** tab.
25.	**Method 1 - Add criteria from the Fields tab** In this example, you will enter a specific Business Unit value as criteria to filter the query results. Click the **BUSINESS_UNIT - Business Unit Add Criteria** button. 
26.	Changes can be made to any of the components of the Edit Criteria Properties panel. For this example, the Choose Expression 1 Type, Choose Expression 2 Type, and Expression 1 Condition Type will remain as defaulted.
27.	By selecting the Add Criteria funnel for the BUSINESS_UNIT field on the Fields tab, the field name defaults into the Expression 1 Record Alias.Fieldname.
28.	The Condition Type determines how a query compares values specified in Expression 1 and Expression 2. In this example, you want to specify a Business Unit, so the Condition Type will remain 'equal to'. Other Condition Type options are available and will be demonstrated later in the topic.
29.	Expression 2 defaults to the Constant option. Other options are available for Expression 2 and will be demonstrated later in this topic. For this example, a single Business Unit will be specified as a constant, so the system will retrieve data for the specified Business Unit only. If the Business Unit designation is unknown, click the *Select Constant From List* (Magnifying glass) button.
30.	Enter the desired information into the **Constant** field. Enter "**LSUSH**". ***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.***
31.	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 (LSUNO). In other words, only AP voucher data for the Business Unit LSUSH (LSUNO) will be retrieved.
32.	Click the **OK** button. 

Step	Action
33.	Click the **Save** button. 
34.	**Method 1 Summary:** 1. The Business Unit Add Criteria was selected, and 2. A constant Business Unit value was specified on the Edit Criteria Properties panel. 3. The system will retrieve AP voucher data for LSUSH (LSUNO) only. ***This completes the discussion of Method 1 - Add criteria from the Fields tab.***
35.	**Method 2 - Add criteria from the Criteria tab** In this example, you will specify a date range for the INVOICE_DT - Invoice Date. Click the **Criteria** tab. 
36.	As criterion are added to the query, they are listed on the Criteria tab. *The system filters data on the 'Logical' order of added criteria. The Logical represents how criteria compare to each other.* If only one criteria is added, the *Logical* field will either be left *blank*, *or* the option '*NOT*' may be selected. In this example, the field is left blank, so data will be retrieved for LSUSH (LSUNO) only. If the 'NOT' logical was used, the system would retrieve all Business Units except LSUSH (LSUNO).
37.	Click the **Add Criteria** button. 
38.	When selecting Add Criteria on the Fields tab, the Record Alias.Fieldname defaulted into Expression 1. When adding criteria from the Criteria tab, you must select the **Record Alias.Fieldname** using the *Select Record and Field* (magnifying glass) button. Click the **Select Record and Field** button. 
39.	Click the **A.INVOICE_DT - Invoice Date** link. 

Step	Action
40.	In this example, you do not want the INVOICE_DT - Invoice Date to equal a specific date. You want the system to retrieve data using a specified range therefore, the Condition Type must be changed from 'equal to' to 'between'. Click the button to the right of the **Condition Type** field. 
41.	Click the **between** list item. 
42.	Once the 'between' option is selected, the Expression 2 changes from a single Constant field to multiple Constant fields so that you may enter a beginning and ending date for your date range. Enter the desired information into the **Date** field. Enter "**01012017**".
43.	Enter the desired information into the **Date 2** field. Enter "**01312017**".
44.	Based on the criteria selected in Expression, Condition Type, and Expression 2, the system will retrieve data for vouchers with an INVOICE_DT between 01/01/2017 and 01/31/2017.
45.	Click the **OK** button. 
46.	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. If the Logical had been set to 'OR', the system would have retrieved data that met either criteria (i.e., the Business Unit does not equal LSUSH, or the Invoice Date does not fall with the Invoice Date range). Based on the selected criteria, the system will only retrieve vouchers for LSUSH (LSUNO) Business Unit with an Invoice Date between 01/01/2017 and 01/31/2017.
47.	Click the **Save** button. 
48.	**Method 2 Summary:** 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 01/01/2017 through 01/31/2017; 5. The system will retrieve vouchers with an Invoice Date between 01/01/2017 and 01/31/2017 for LSUSH. ***This completes the discussion of Method 2 - Add criteria from the Criteria tab.***

Step	Action
49.	**Method 3 - Add criteria from the Query tab** In this example, you will specify the POST_STATUS_AP equal 'P' for 'Posted'. Click the **Query** tab. 
50.	Click the Open Folder button next to *A. VOUCHER _ AP Voucher Header Table* if the fields are not displayed. Click the **Down** button of the scrollbar. 
51.	Click the **POST_STATUS_AP Use as Criteria** button. 
52.	You clicked the Add Criteria (funnel) on the Query tab for a specified field therefore, the Record Alias.Fieldname defaults into the Expression 1 box. You want the POST_STATUS_AP to equal a specific value, so the Condition Type will remain 'equal to'. You will identify the POST_STATUS_AP value in Expression 2. POST_STATUS_AP has several predefined value options. Click the **Select Constant From List** button. 
53.	In this example, you want the POST_STATUS_AP value to equal Posted, so the 'P' value will be selected. Click the **P - Posted Select Constant** link. 
54.	Click the **OK** button. 
55.	Click the **Criteria** tab. 

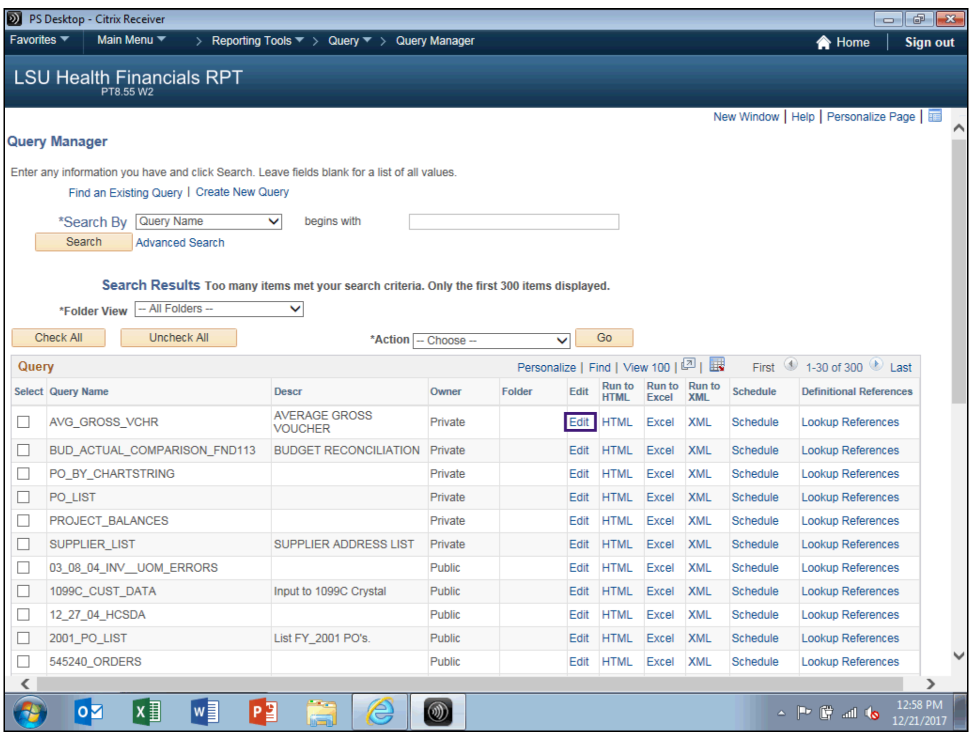
Step	Action
56.	An additional row now displays on the Criteria tab for POST_STATUS_AP. The Logical field for POST_STATUS_AP defaults as '**AND**', requiring the system to only retrieve data meeting **all** criteria. If the Logical had been set to 'OR', the system would have retrieved data that met either criteria (i.e., the Business Unit does not equal LSUSH, or the Invoice Date does not fall with the Invoice Date range, or the Post Status does not equal Posted). Based on the selected criteria, the system will only retrieve vouchers for LSUSH Business Unit with an Invoice Date between 01/01/2015 and 01/31/2015, and having a Post Status of Posted.
57.	Click the **Save** button. 
58.	**Method 3 Summary:** 1. Clicked Query tab; 2. Clicked the Use as Criteria button on the Query tab for the POST_STATUS_AP option; 3. Selected 'P' for 'Posted' for Expression 2; and 4. The system will retrieve vouchers with a Post Status of Posted. ***NOTE: If desired, you may navigate to the Run tab to preview your query.*** ***This completes the discussion of Method 3 - Add criteria from the Query tab.***
59.	This completes ***Create a Query using Criteria Components***. **End of Procedure.**

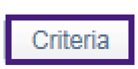
Edit or Delete Criteria

Procedure

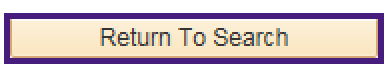
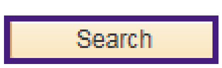
In this topic you will learn how to **Edit and/or Delete Criteria**.

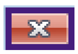
Step	Action
1.	From the Query Manager page, you can Edit and/or Delete Criteria from you query by utilizing the Edit link. In this example, you will retrieve all vouchers regardless of whether the voucher has been Posted for LSUSH (LSUNO) with an INVOICE_DT range of 01/01/2017 through 01/31/2017.



Step	Action
2.	Click the **AVG_GROSS_VCHR Edit** link. 
3.	Click the **Criteria** tab. 

Step	Action
4.	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. Click the **POST_STATUS_AP Delete** button.
5.	Click the **Save** button.
6.	Click the **Run** tab.
7.	Because our invoices are for January, 2017, and the accounting period has posted to the general ledger, only posted vouchers display. Generally, if running the query for current data, some unposted vouchers would also be included. Unposted vouchers have a status of 'U'. Click the **Criteria** tab.
8.	Criteria can be edited as well as deleted. In this example, you will edit the **BUSINESS_UNIT** criteria to include HPLMC in addition to LSUSH (or LSUNA in addition to LSUNO). Click the **BUSINESS_UNIT Edit** button.
9.	The **Condition Type** must be changed so the system will retrieve vouchers for LSUSH and HPLMC (LSUNO and LSUNA). Click the button to the right of the **Down** field. *Condition Type equal to
10.	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. Click the **in list** item.
11.	Expression 2 is no longer a Constant value and indicates the comparison values the system will match when compiling results. Click the **Select List Members** button.

Step	Action
12.	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 **must** enter the Business Unit identifiers into the **Value** field in ALL CAPS. Enter the desired information into the **Value** field. Enter "**LSUSH**". ***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.***
13.	The Business Unit is not added to the list until you click the add Value button. Click the **Add Value** button. 
14.	Repeat steps 12 and 13 until all Business Units have been added to the list. Enter the desired information into the field. Enter "**HPLMC**". ***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.***
15.	Click the **Add Value** button. 
16.	Click the **OK** button. 
17.	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. Click the **OK** button. 
18.	Click the **Save** button. 
19.	Click the **Return to Search** button. 
20.	Enter the desired information into the **begins with** field. Enter "**AVG%**".
21.	Click the **Search** button. 

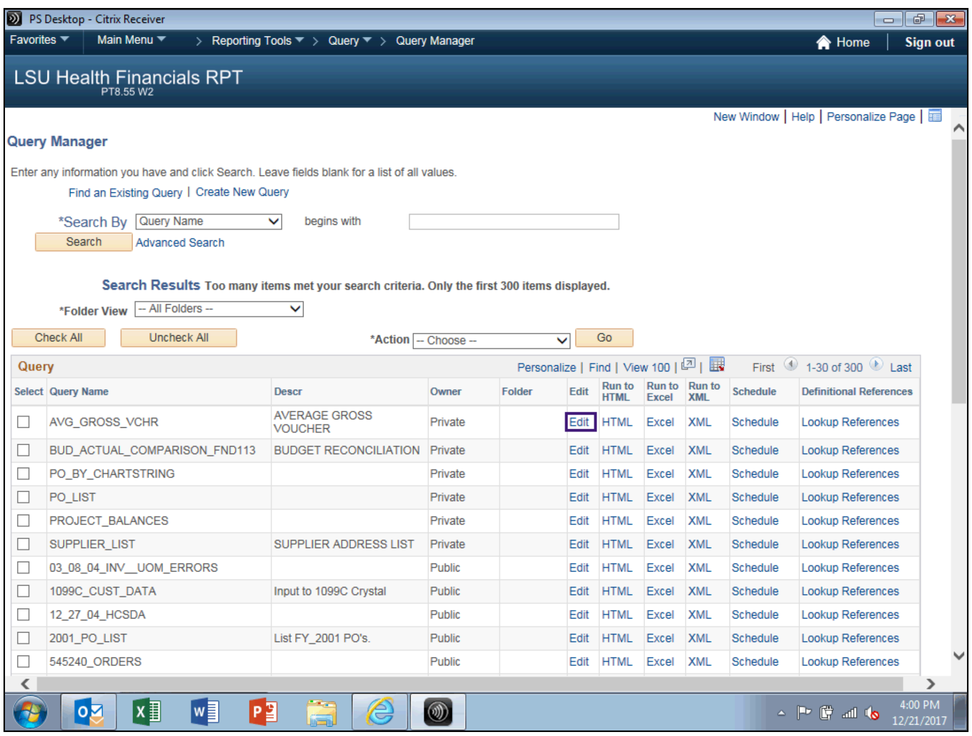
Step	Action
22.	Click the **AVG_GROSS_VCHR HTML** link. This will open a new window. 
23.	The query results display. The results include vouchers for LSUSH and HPLMC (LSUNO and LSUNA) with Invoice Dates from 01/01/2017 through 01/31/2017. Click the **Last** button. 
24.	Click the **Close** button. ***NOTE: Make sure you are clicking the bottom Close button.*** 
25.	This completes ***Edit and/or Delete Criteria***. **End of Procedure.**

Create a Runtime Prompt

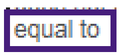
Procedure

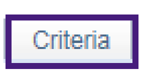
In this topic you will learn how to **Create a Runtime Prompt**.

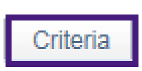
Step	Action
1.	Runtime Prompts allow you to further refine your query output results. When running your query, the system will 'prompt' you to enter a value prior to retrieving results. In this example, you will create a runtime prompt to view results using the **Optional** and **Default Value** Prompt Properties.

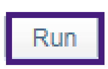


Step	Action
2.	Click the **AVG_GROSS_VCHR Edit** link. 
3.	Click the **Criteria** tab. 

Step	Action
4.	Click the **BUSINESS_UNIT Edit** button. 
5.	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 that creating a list that includes all Business Units. Click the button to the right of the **Condition Type** field. 
6.	Click the **equal to** list item. 
7.	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. Click the **Prompt** option. 
8.	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: **New Prompt** and **Edit Prompt**. Currently, there are no Prompts identified, so the Edit Prompt option would not be selected at this time. Click the **New Prompt** link. 
9.	**Edit Prompt Properties** The **Edit Prompt Properties** is where you define prompt parameters and is comprised of the following fields: **Field Name -** The name of the field for which you are creating the prompt; **Type -** Indicates the type of field (i.e., Character, Date, Time, Number, etc.); and **Format -** Specifies the format (i.e., Upper Case, Mixed Case, Zip Code, etc.) of the field.
10.	**Edit Prompt Properties** (continued) **Length -** The number of available characters for that field; **Decimals -** The number, if any, of decimal places allowed; and **Edit Type -** Allows you to evaluate a value against a set of tables to determine if the value is valid.

Step	Action
11.	**Edit Prompt Properties** (continued) **Heading Type -** Defines whether the prompt heading is Text, RFT Short, or RFT Long; **Heading Text -** Displays the label for the prompt box; **Unique Prompt Name -** A default value generated by the Query Manager; and **Prompt Table -** This field is not used when creating simple queries.
12.	***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.***
13.	In this example, the *Optional checkbox* will remain *unchecked* requiring a prompt value be entered. The other prompt values will remain as defaulted. Click the **OK** button. 
14.	The Prompt created displays in the Expression 2 box. Prompts are displayed in the Criteria format ':number' (i.e., :1). Additional prompts may be created and would be assigned sequential numbers to be displayed as :2, :3, etc.
15.	Click the **OK** button. 
16.	Click the **Save** button. 
17.	Click the **Run** tab. 
18.	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. Enter the desired information into the **Unit** field. Enter "**LSUSH**".
19.	Click the **OK** button. 
20.	Your query results display. Click the **Criteria** tab. 

Step	Action
21.	You can edit your prompt parameters as your needs require. Click the **BUSINESS_UNIT Edit** button. 
22.	Click the **Edit Prompt** link. 
23.	***When the Optional box is checked, it indicates the prompt entry for the field is <u>optional</u>. No value would be required at run time in the prompt box.*** ***CAUTIONARY NOTE: If the prompt value is set to optional, the query result set may be too large since the results are not limited.*** Click the **Optional** option. 
24.	Click the **OK** button. 
25.	Click the **OK** button. 
26.	Click the **Run** tab. 
27.	At run-time, a user would **<u>not</u>** be **required** to perform an entry in the run-time prompt dialog for the Unit. Click the **OK** button. 
28.	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. Click the **Criteria** tab. 
29.	Click the **BUSINESS_UNIT Edit** button. 
30.	Click the **Edit Prompt** link. 

Step	Action
31.	Uncheck the Optional box. Click the **Optional** option. 
32.	**Default Value** ***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 not 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.*** ***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.*** Enter the desired information into the field. Enter "**HPLMC**". ***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.***
33.	Click the **OK** button. 
34.	Click the **OK** button. 
35.	Click the **Run** tab. 
36.	The prompt entry box displays the Default Value. As previously noted, this may be overwritten if another value is desired at run-time. Enter the desired information into the **Unit** field. Enter "**LSUSH**". ***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.***
37.	Click the **OK** button. 

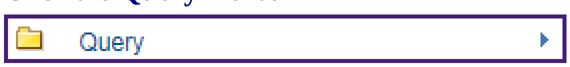
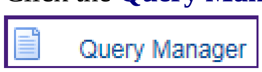
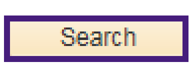
Step	Action
38.	When the Default Value is overwritten in the prompt dialog at run-time, the query results will be limited to the prompt criteria entered. Click the **Rerun Query** tab. 
39.	***The Default Value is populated even if the user were to blank out the field value at run-time. In this example, the default for Business Unit is HPLMC (LSUNA). If you blank out the field and the query results will still produce results for HPLMC (LSUNA).*** Highlight **HPLMC** and click the **Delete** button on your keyboard to blank out the **Unit** field. 
40.	Click the **OK** button. 
41.	Query results for the Default Value = HPLMC display. Click the **Home** button. 
42.	This completes ***Create a Runtime Prompt***. **End of Procedure.**

Exercise 5

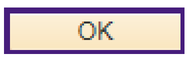
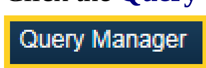
Create a Query using Hierarchy Joins

Procedure

In this topic you will learn how to **Create a Query using Hierarchy Joins**.

Step	Action
1.	A **Hierarchy Join** uses tables/records that are related through a parent/child relationship. A child table is a table that uses all the same *key fields* as its parent, plus one or more additional keys. Hierarchy Joins are the *strongest* of the three joins, and are *predefined* in the system. This means the parent child *relationships* are already *identified and defined* within the system. In this exercise, you will create a **Hierarchy Join** when the **VENDOR_ADDR - Supplier Address** record (child) is joined to the **VENDOR - Supplier Header Table** (parent).
2.	Click the **Main Menu** button. 
3.	Click the **Reporting Tools** menu. 
4.	Click the **Query** menu. 
5.	Click the **Query Manager** menu. 
6.	Click the **Create New Query** link. 
7.	You will first search for the *parent* table/record. Enter the desired information into the **begins with** field. Enter "**VENDOR**".
8.	Click the **Search** button. 
9.	Click the **Add Record** link. 

Step	Action
10.	When a record is selected, the system assigns an alias name to the record. When using joins, the alias name determines the order of the joins. In this example, the VENDOR table is the alias 'A' because it is the first record used. You will select the following fields from the VENDOR record: **VENDOR_ID**, **NAME1**, and **VENDOR_STATUS**.
11.	Click the **VENDOR_ID - Supplier ID** option.
12.	Click the **NAME1 - Supplier Name** option.
13.	Click the **VENDOR_STATUS - Supplier Status** option.
14.	By clicking the **Hierarchy Join** link, all of the records that have a parent/child relationship with the VENDOR table display. Click the **Hierarchy Join** link. 
15.	The VENDOR table is the parent record. The VENDOR_ADDR record is a child of the VNDR_ADDR_SCROL record. The VNDR_ADDR_SCROL record is a child of the parent record VENDOR table. Click the **VENDOR_ADDR - Supplier Address** link. 
16.	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. Click the **OK** button. 
17.	The 'B' alias has been assigned for the VENDOR_ADDR RECORD. The system will first retrieve data for the 'A' record and then the data for the 'B' record.
18.	Click the **ADDRESS1 - Address Line 1** option.
19.	Click the **CITY - City** option.
20.	Click the **STATE - State** option.

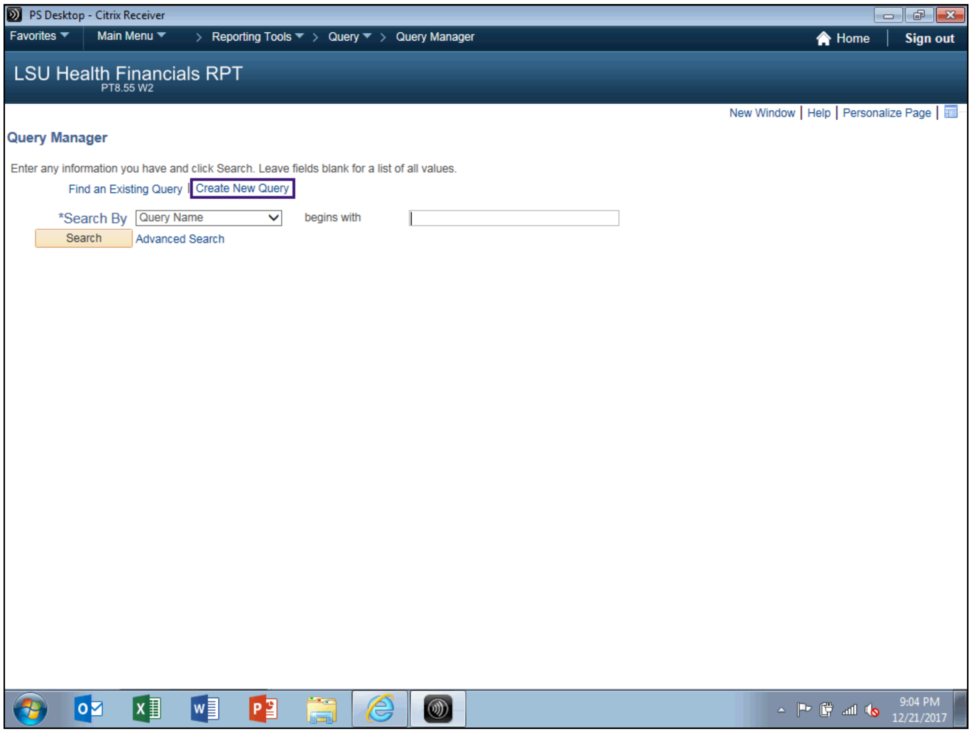
Step	Action
21.	Click the **POSTAL - Postal Code** option. 
22.	Click the **Fields** tab. 
23.	The Fields tab displays all the records and fields selected for the current query. Click the **Save As** link. 
24.	Enter the desired information into the **Query** field. Enter "**HIERARCHY JOIN**".
25.	Enter the desired information into the **Description** field. Enter "**TEST FOR CLASS**".
26.	Enter the desired information into the **Query Definition** field. Enter "**DATE CREATED**".
27.	Click the **OK** button. 
28.	You can preview your query in the Run tab. Click the **Run** tab. 
29.	Your supplier address list displays. Click the **Query Manager** button. 
30.	This completes ***Create a Query using Hierarchy Joins***. **End of Procedure.**

Create a Query using Standard (Any) Joins

Procedure

In this topic you will learn how to **Create a Query using Standard (Any) Joins**.

Step	Action
1.	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. Unlike Hierarchy Joins, **Standard (Any) Joins** are **not** *predefined* in the system. You **must** *manually join* the *tables/records* when using a **Standard (Any) Join**. ***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 record.***
2.	In this exercise, you will join the **PO_HDR** record and the **PO_LINE_DISTRIB** record to retrieve Purchase Orders (POs) between a specified *date range* for a specified *Business Unit*. You will also find the *merchandise amount* of the PO and *Department ID* number associated with the PO.



Step	Action
3.	Click the **Create New Query** link. Create New Query
4.	Enter the desired information into the **begins with** field. Enter "**PO_HDR**".
5.	Click the **Search** button. Search
6.	Click the **PO_HDR - Purchase Order Header Add Record** link. Add Record
7.	Click the **BUSINESS_UNIT - Business Unit** option.
8.	Click the **PO_ID - PO Number** option.
9.	Click the **PO_DT - Purchase Order Date** option.
10.	Click the **Fields** tab. Fields

Step	Action
11.	Click the **BUSINESS_UNIT - Business Unit Add Criteria** button.
12.	Enter the desired information into the **Constant** field. Enter "**LSUNO**". ***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.*** Constant
13.	Click the desired object. OK
14.	Click the **PO_DT - Purchase Order Date Add Criteria** button.
15.	Click the button to the right of the **Condition Type** field. *Condition Type equal to
16.	Click the **between** list item. between
17.	For this exercise, us the date range 01/01/2017 through 01/31/2017. ***NOTE: When creating a query, it is optimal to select a smaller data sample for testing, such as 01/01/17 - 01/31/17. This will result in a quicker run time, and make it easier to test and troubleshoot your query.*** Enter the desired information into the **Date** field. Enter "**01012017**". *Date
18.	Enter the desired information into the **Date 2** field. Enter "**01312017**". *Date 2
19.	Click the **OK** button. OK
20.	Click the **Run** tab. Run
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 **Records** tab. Records

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

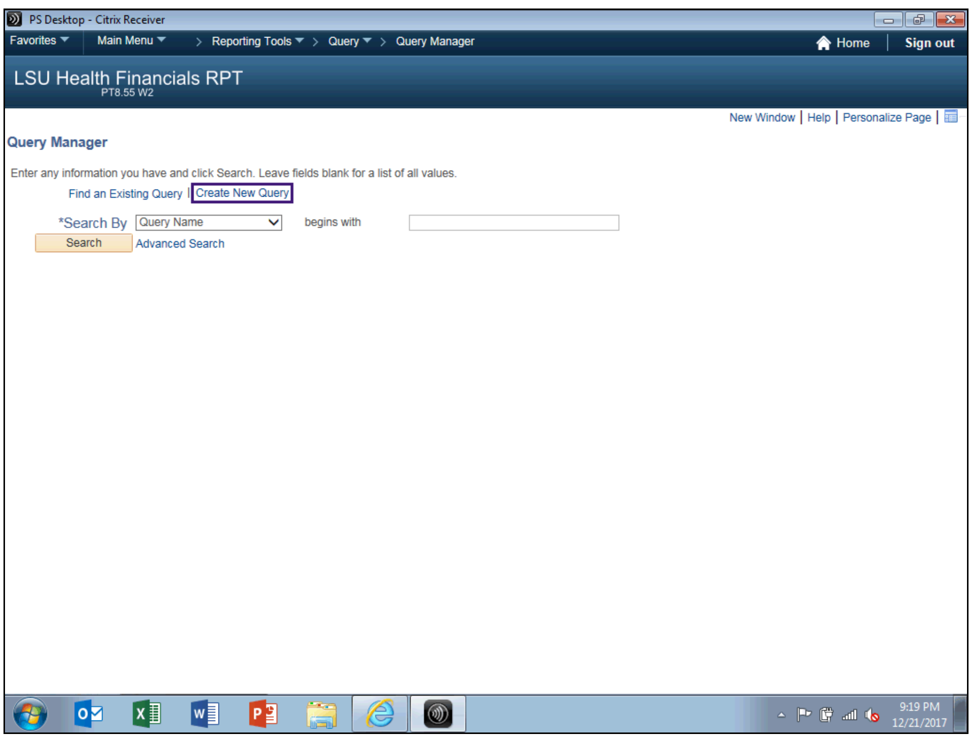
Step	Action
35.	Click the **OK** button. 
36.	Click the **Query Manager** button. 
37.	This completes ***Create a Query using Standard (Any) Joins***. **End of Procedure.**

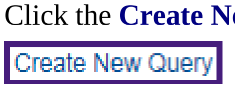
Create a Query using Related Record Joins

Procedure

In this topic you will learn how to **Create a Query using Related Record Joins**.

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



Step	Action
3.	Click the **Create New Query** link. 
4.	Enter the desired information into the **begins with** field. Enter "**ITEM_MFG**".

Step	Action
5.	Click the **Search** button. Search
6.	Click the **ITEM_MFG - Item Manufacturer Table Add Record** link. Add Record
7.	Click the **SETID - SetID** option.
8.	Click the **INV_ITEM_ID - Item ID** option.
9.	Click the **MFG_ID - Manufacturer ID** option.
10.	Click the **Fields** button. Fields
11.	***NOTE: Add Criteria to the SETID and INV_ITEM_ID fields to retrieve a small data sample for testing.*** Click the **SETID - SetID Add Criteria** button.
12.	Enter the desired information into the **SHARE** field. Enter "**SHARE**". Constant
13.	Click the **OK** button. OK
14.	Click the **INV_ITEM_ID Add Criteria** button.
15.	Click the button to the right of the **Condition Type** field. *Condition Type equal to
16.	Click the **between** list item. between
17.	In this exercise you are looking for Inventory Item ID's between **102000** and 102500. Enter the desired information into the **Constant** field. Enter "**102000**". Constant

Step	Action
18.	Enter the desired information into the **Constant 2** field. Enter "**102500**". Constant 2
19.	Click the **OK** button. OK
20.	Click the **Run** tab. Run
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 **Query** tab. Query
22.	Click the **Join MANUFACTURER - Manufacturer Table** link. ***NOTE: Like Hierarchy Joins, Related Record Joins are predefined in the system. The relationship between the fields has already been identified, so no criterion needs to be added.*** Join MANUFACTURER - Manufacturer Table
23.	In the Join Type box, the "Join filter and get additional fields (Standard Joins)" option defaults and should remain as defaulted. Click the **OK** button. OK
24.	The 'B' alias record has been assigned to the MANUFACTURER record.
25.	Click the **DESCR60 - Description** option.
26.	You can preview your query in the **Run** tab. Click the **Run** tab. Run
27.	Click the **Fields** tab. Fields
28.	Click the **Save As** link. Save As
29.	Enter the desired information into the **Query** field. Enter "**RELATED_RECORD_JOIN**".

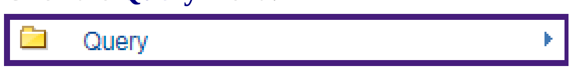
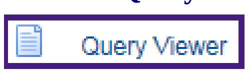
Step	Action
30.	Enter the desired information into the **Description** field. Enter "**TEST FOR CLASS**".
31.	Enter the desired information into the **Query Definition** field. Enter "**DATE CREATED**".
32.	Click the **OK** button. 
33.	Click the **Query Manager** button. 
34.	This completes ***Create a Query using Related Record Joins***. **End of Procedure.**

Exercise 6

Schedule a Query

Procedure

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

Step	Action
1.	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. In this exercise, you will schedule the **LSU_VENDORS_W_ADDRESS** query to run in 5 minutes.
2.	Click the **Main Menu** button. 
3.	Click the **Reporting Tools** menu. 
4.	Click the **Query** menu. 
5.	Click the **Query Viewer** menu. 
6.	Enter the desired information into the **begins with** field. Enter "**LSU_VENDORS**".
7.	Click the **Search** button. 
8.	Click the **LSU_VENDORS_W_ADDRESS Schedule** link. 
9.	Enter the desired information into the **Run Control ID** field. Enter "**SCHED_QUERY**".

Step	Action
10.	The system defaults you into the **Add a New Value** tab. A *Run Control ID* **<u>must</u>** be added the **first** time you schedule a query. The *Run Control ID* is used to access the Process Scheduler. The *Run Control ID* is: 1. Specific to the User ID; 2. Can be entered in upper, lower, or mixed case; 3. Can be up to thirty (30) characters long; 4. Cannot contain any special characters such as &, $, %, etc.; and 5. Must be one continuous string of characters. Cannot contain any blank spaces. An underscore can be used to link words.
11.	Click the **Add** button. Add
12.	Enter the desired information into the **Description** field. Enter "**SUPPLIER ADDRESS LIST**". *Description
13.	Click the **OK** button. OK
14.	Click the button to the right of the **Server Name** field. Server Name
15.	Click the **PSNT** list item. PSNT
16.	Enter the desired information into the **Run Time** field. Enter "**1:01 pm**". Run Time 12:56:39PM
17.	Click the desired object. OK
18.	Once the scheduled time has elapsed, and the query runs, you can view the query results via the **Report Manager**. Click the **Reporting Tools** button. Reporting Tools
19.	Click the **Report Manager** menu. Report Manager

Step	Action
20.	Click the ***Link*** displaying in the **Description** column to view the results. This will open a new window. ***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.*** Click the **SUPPLIER_ADDRESS_LIST** link. 
21.	Once the results display, you can use any functionality in Excel to manipulate the results. Click the **Close Report** button. 
22.	Click the **Home** button. 
23.	This completes ***Schedule a Query***. **End of Procedure.**

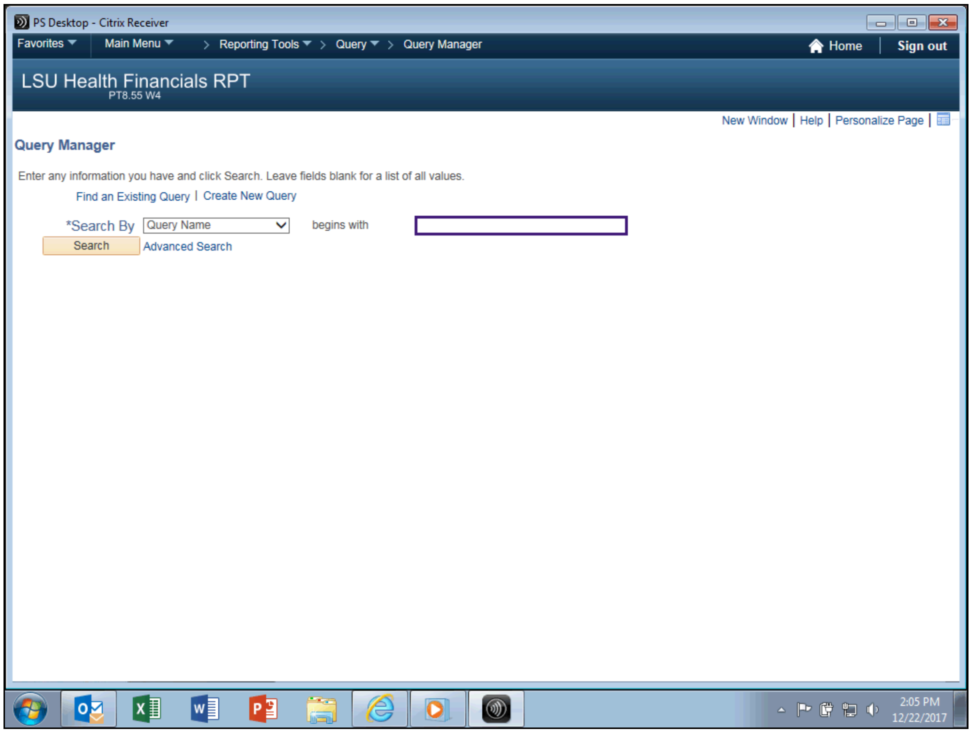
Appendix

Copy a Query to Another User

Procedure

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

Step	Action
1.	Security access permitting, users may select the following from the ***Action*** drop-down menu: 1. Add a query to Favorites; 2. Delete a Query; 3. Copy a query to another user; 4. Move a query to another folder; and/or 5. Rename a selected query. ***NOTE: Only Private queries may be Deleted, Copied, Moved, or Renamed. Public queries can be Added to Favorites.*** ***NOTE: The above Actions can only be accessed and performed in Query Manager. These options are not available to users in Query Viewer.***



Step	Action
2.	In this exercise you will copy the **AVG_GROSS_VCHR** query to another user. Enter the desired information into the **begins with** field. Enter "**A**".
3.	Click the **Search** button. Search
4.	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 **AVG_GROSS_VCHR** option.
5.	Click the button to the right of the **ACTION** field. *Action -- Choose --
6.	Private queries may be copies 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 **Copy to User** list item. Copy to User

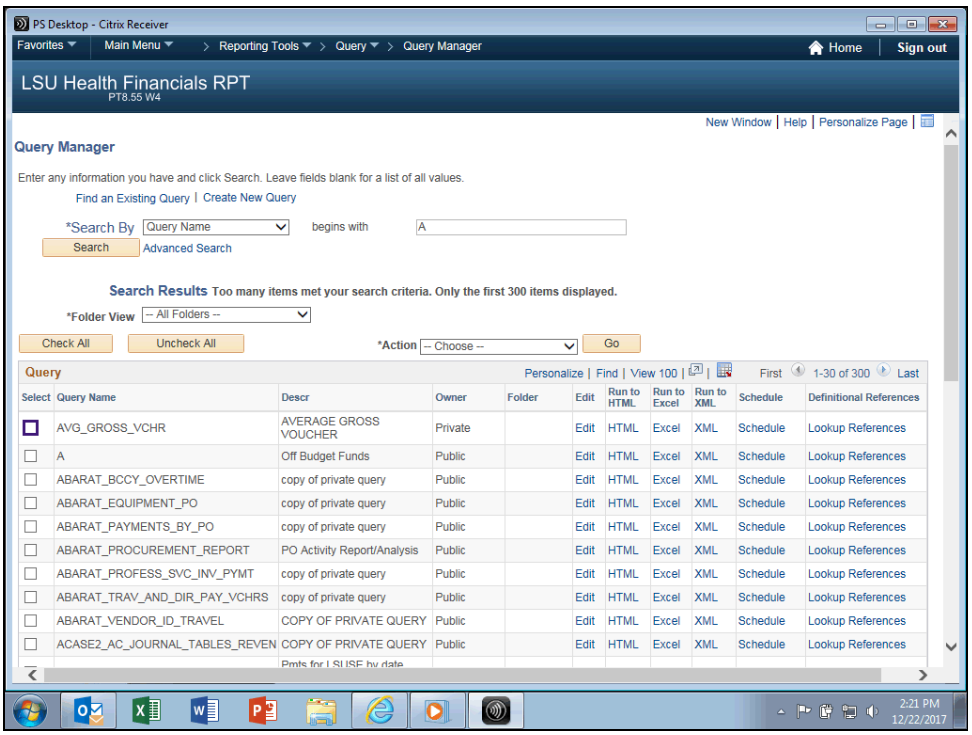
Step	Action
7.	Click the **Go** button. 
8.	You must enter the UserID of the person to who you will copy the query in **ALL CAPS**. Enter the desired information into the **User ID** field. Enter "**USER ID**". 
9.	Click the **OK** button. 
10.	A message will display if the query was successfully copied. A message box will also display if the query does not copy correctly. Click the **OK** button. 
11.	Click the **Query Manager** button. 
12.	This completes ***Copy a Query to Another User***. **End of Procedure.**

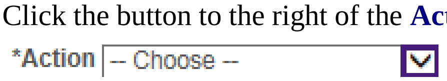
Rename a Query

Procedure

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

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



Step	Action
2.	Select the query you wish to rename by clicking the checkbox to the left of the Query Name. Click the **AVG_GROSS_VCHR** option. 
3.	Click the button to the right of the **Action** field. 

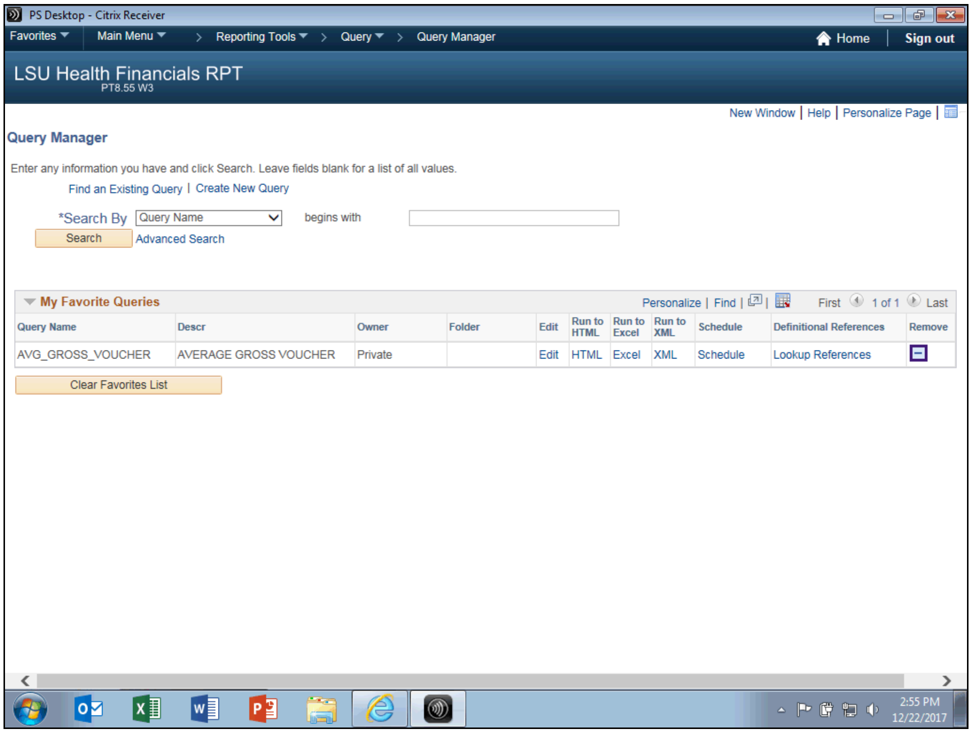
Step	Action
4.	Click the **Rename Selected** list item. 
5.	Click the **Go** button. 
6.	Enter the desired information into the **New Name** field. Enter "**AVG_GROSS_VOUCHER**".
7.	Click the **OK** button. 
8.	On the Query Manager page, you may confirm the query name has changed from AVG_GROSS_VCHR to AVG_GROSS_VOUCHER.
9.	This completes ***Rename a Query***. **End of Procedure.**

Clear, Remove, and/or Delete a Query

Procedure

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

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



Step	Action
3.	You can remove a single query by clicking the remove (-) button. Click the **AVG_GROSS_VOUCHER Remove** button.
4.	The My Favorite Queries section was deleted from the page. Had other queries been saved in My Favorite Queries, removing a single query would not have deleted the section.
5.	From time to time, you should *review* you *Private queries* and delete those queries no longer used from the system. If you do not have the proper security to delete a query, contact your SuperUser for assistance.
6.	Enter the desired information into the **begins with** field. Enter "**AVG**".
7.	Click the **Search** button. Search
8.	Private queries will display at the top of the Search Results list. Click the **AVG_GROSS_VOUCHER** option.
9.	Click the button to the right of the **Action** field. *Action -- Choose --

Step	Action
10.	Click the **Delete Selected** list item. 
11.	Click the **GO** button. 
12.	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 **Yes** button. 
13.	The query is deleted and you are returned to the Query Manager Search page.
14.	This completes ***Clear, Remove, and/or Delete a Query***. **End of Procedure.**

Commonly Used Tables in Query

LSUHSC
PeopleSoft v9.x
Financials
Commonly Used Tables for Query

General Ledger

Table Name	Brief Description
LEDGER	Ledger Data
JRNL_HEADER	Journal Header Data
JRNL_LN	Journal Line Data
ZZGL_TRANS_DTL	Journal Transaction Detail (RPT only)
ZZGL_TRANS_SUM1	Ledger Data (RPT only)

Commitment Control

Table Name	Brief Description
KK_BUDGET_HDR	Budget Journal Header Table
KK_BUDGET_LN	Budget Journal Line Data
ZZKK_ACT_LOG_VW	Commitment Control Budget Activity
LEDGER_KK	Commitment Control Ledger Data

Chartfields

Table Name	Brief Description
GL_ACCOUNT_TBL	Account Numbers
DEPT_TBL	Departments

CLASS_CF_TBL	Class Codes
FUND_TBL	Fund Codes
PROGRAM_TBL	Program Numbers
PROJECT	Project IDs

Asset Management

Table Name	**Brief Description**
ASSET	Asset Information
ASSET_ACQ_DET	Asset Acquisition Details
ASSET_CUSTODIAN	Asset Custodian
ASSET_LOCATION	Asset Location
BOOK	Asset Financial Book by Asset ID
ASSET_NBV_TBL	Asset Net Book Value Reporting Table
COST	Asset Cost Information
DEPRECIATION	Depreciation Transactions
DEPR_RPT	Depreciation Reporting Table
DIST_LN	AM Accounting Entries
RETIREMENT	Asset Retirements

Accounts Receivable

Table Name	**Brief Description**
ITEM_ACTIVITY	Customer Item Activity
ITEM_DST	Customer Item Distribution

Billing

Table Name	**Brief Description**

BI_ACCT_ENTRY	Billing Account Entry Table
BI_HDR	Billing Header
BI_LINE	Billing Line
BI_LINE_DIST	BillingLine Distribution

Grants/ Awards/Contracts/Projects

Table Name	**Brief Description**
ZZGM_AWARD_VW	Award Parent Record
GM_AWARD_ATTR	Award Attributes
GM_AWARD_FUND_PD	Award Funding by Period
ZZCA_CNT_HDR_VW	Contract Header
ZZCA_DETAIL_VW	Contract Line
ZZCA_DTL_PRJ_VW	Contract Line Project Details
CA_DETAIL_UAR	Unbilled Accounts Receivable
CA_RATE	Contract Rates
PROJECT	Projects
PROJ_ACTIVITY	Project Activities
PROJ_RESOURCE	Project Resources
PROJECT_FS	Chartfield Projects View
PROJECT_DESCR	Project Description
CUSTOMER	Customer Header Information
PC_BUD_DETAIL	Project Budget Detail Record
GM_PRJ_DEPT	Grants Project Department
GM_PRJ_ACT_FA	F&A Rate Type

Inventory

Table Name	**Brief Description**
BU_ITEMS_INV	Business Unit Item Table
CART_ATTRIB_INV	Par Location Attributes
CART_GROUP_INV	Cart Group - Inventory

CART_TEMPL_INV	Cart Template Inventory
CM_ACCTG_DIST	Accounting Distribution
CM_ACCTG_LINE	Inventory Accounting Distribution
COUNT_HDR_INV	Physical/Cycle Count Header
COUNT_INV	Physical/Cycle Count Item
DEMAND_INV	Invetory Demand Table
DEMAND_PHYS_INV	Demand Picking Locations
INV_ITM_FAM	Inventory Families
INV_ITM_GROUP	Inventory Groups
INV_ITEM_UOM	Inventory Item Unit of Measure Conversion
INV_ITEMS	Inventory Items Master
ISSUE_HDR_INV	Inventory Issues Header
MASTER_ITEM_TBL	Master Item Table
MSR_HDR_INV	Material Stock Request Header
PHYSICAL_INV	Physical Inventory Table
SHIP_HDR_INV	Shipping Header Table
TRANSACTION_INV	Inventory Transactions
IN_DEMAND	Inventory Demand Fulfillment Table (RPT only)
CM_DEPLETE	Inventory Depletions Table
CM_DRILL_INV_VW	Inventory Transactions Drill
ITM_MFG	Item Manufacturer table
MANUFACTURER	Manufacturers table

Requisitions

Table Name	**Brief Description**
REQ_HDR	Requisition Header
REQ_LINE	Requisition Line
REQ_LINE_SHIP	Requisition Line Ship
REQ_LN_DISTRIB	Requisition Line Distributions
REQ_APPROVAL	Requisition Approval

Purchasing

Table Name	Brief Description
RFQ_HDR	Request for Quote Header
RFQ_LINE	Request for Quote Line
PO_HDR	Purchase Order Header
PO_LINE	Purchase Order Line
PO_LINE_DISTRIB	Purchase Order Distribution
PO_LINE_SHIP	Purchase Order Line Ship
MASTER_ITEM_TBL	Master Item Table
ITEM_VENDOR	Vendor Item Table
PO_CHNG_HDR	PO Change Header
PO_CHNG_LINE	PO Change Line
PO_COMMENTS	PO Comments
ITM_CAT_TBL	Item Category Codes
RECV_HDR	Receiver Header
RECV_LN	Receiver Line
CNTRCT_HDR	Contract Header
CNTRCT_LINE	Contract Line
CNTRCT_LINE_UOM	Contract Item Unit of Measure
CNTRCT_LN_SHIP	Contract Shipment Table
CNTRCT_MSTR	Master Contract

Accounts Payable

Table Name	Brief Description
VOUCHER	Voucher Header Table

VOUCHER_LINE	Voucher Line Table
DISTRIB_LINE	Voucher Distribution Line
MTCH_RULES	Matching Rules
VCHR_MTCH_EXCPT	Match Exceptions Detail
ZZPAYMENT_TBLVW	AP Disbursements
PYMNT_XREF_VW	Payment Voucher Information
PYMNT_VCHR_XREF	Voucher Status

Suppliers (Formerly Vendors)	
VENDOR	Supplier Header Table
VENDOR_ADDR	Supplier Address Table
VENDOR_CNTCT	Supplier Contact Information
VENDOR_LOC	Supplier Location
VENDOR_WTHD	Supplier Withholding Information