

Financials Query 9.2 PT. 8.55

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Table of Contents

Financials Query 9.2 PT. 8.55	
Introduction to Query Navigate to Query Viewer	1
Exercise 1	3
Exercise 2	11
Exercise 3 Create and Format a Query	13
Exercise 4 Create a Query using Criteria Components Edit or Delete Criteria Create a Runtime Prompt	
Exercise 5 Create a Query using Hierarchy Joins Create a Query using Standard (Any) Joins Create a Query using Related Record Joins	
Exercise 6	69
Appendix Copy a Query to Another User Rename a Query Clear, Remove, and/or Delete a Query	
Commonly Used Tables in Query	82

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.
	PS Launcher

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.
6.	Click the Main Menu button.
	Main Menu 🔻
7.	Click the Reporting Tools menu.
	Reporting Tools
8.	Click the Query menu.
	Cuery
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
1.1	Add a query to Query Favorites or run a Query from the Query Favorites list.
11.	This completes <i>Navigate to Query Viewer</i> . 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 <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.	You must enter all or part of the query name into the Search By field. The Search By field is <u>not</u> 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.

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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 ' <i>begins with</i> ' operand cannot be changed on the Query View 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 Advanced Search link. Advanced Search
9.	Click the button to the right of the Query Name field.
	Query Name begins with

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>= Query Name begins with	
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Uses Record Name	
Uses Field Name	
Access Group Name	
Folder Name begins with	
Owner =	
When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB, EMPLOYEE, JRNL_	_LN.
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Step	Action
10.	Click the contains list item.

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Description begins with V	
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Uses Field Name begins with V	
Access Group Name begins with 🗸	
Folder Name begins with V	
Owner =	
When using the IN or BE I WEEN operators, enter comma separated values without quotes. I.e. JOB, EMPLOYEE, JRNL_LN.	
Search Clear Basic Search	

Step	Action
11.	Enter the desired information into the Query Name field. Enter "APY".
	Query Name
12.	Click the Search button.
	Search
13.	A total of 109 options were returned using the Advanced Search method.
	Click the View 100 link.
	View 100
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 ". SetID:
18.	Click the button to the right of the Supplier Status field. Supplier Status:
19.	Click the Approved list item. Approved
20.	Click the View Results button. NOTE: A list of approved suppliers will be retrieved and displayed below the View Results button. View Results
21.	The total number of approved suppliers retrieved displays above the <i>Description</i> column. In this example, 31,065 suppliers were retrieved. The first 100 suppliers are displayed in ascending order by Supplier ID number. <i>NOTE: The number of approved suppliers will vary as new suppliers are added or existing suppliers are unapproved</i> .
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.

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	SHARE	0000036703	DIAMOND SE- 002	Approved	Supplier	Regular	0000036703	0000036703		SAUTHE	N			SHARE	Share Set ID for Campuses/HCSD
	SHARE	0000036704	COURTADE,-001	Approved	Supplier	Regular	0000036704	0000036704		SAUTHE	N			SHARE	Share Set ID for Campuses/HCSD
	SHARE	0000036705	I.M.S. INC-001	Approved	Supplier	Regular	0000036705	0000036705		ADELAT	N			SHARE	Share Set ID for Campuses/HCSD
	SHARE	0000036706	B&L BIOTEC-001	Approved	Supplier	Regular	0000036706	0000036706		CHAROL	N			SHARE	Share Set ID for Campuses/HCSD
	SHARE	0000036709	SOUTHERN A-005	Approved	Supplier	Regular	0000036709	0000036709		SAUTHE	N			SHARE	Share Set ID for Campuses/HCSD
	SHARE	0000036710	AMBINTER-001	Approved	Supplier	Regular	0000036710	0000036710		BRUSLE	N			SHARE	Share Set ID for Campuses/HCSD
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Step	Action
24.	<i>HTML</i> results can be downloaded to an <i>Excel</i> spreadsheet. Downloading results to an <i>Excel</i> spreadsheet will allow you to manipulate the data, move columns, hide columns, etc.
	Click the Excel Spreadsheet link. This will open a new window.
	Excel SpreadSheet
25.	Click the Open button.
	Open
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.
	Enable Editing
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 <i>Run a Predefined Query to Query Viewer</i> . 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**.

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Step	Action
1.	From the search list results in the navigation <i>Reporting Tools > Query > Query Viewer</i> , click the APY3001_AP_VENDOR_SUMMARY Excel link.
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.

Step	Action
6.	Click the Open button.
	Open
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.
	Enable Editing
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.
	🧟 Query
10.	This completes <i>Run a Predefined Query to Excel</i> . 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. Main Menu ▼

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

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Enter any information you have and click Search. Leave fields blank for a list of all values		
Find an Existing Query Create New Query		
*Search By Query Name v begins with Search Advanced Search		

Step	Action
5.	Click the Create New Query link.
	Create New Query
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 <i>defaults</i> you onto the Records tab.
7.	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).

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return to search	

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 ".
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

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	Key Description	
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	Y VENDOR_ID - Supplier ID	
"Search By Record Name	Y ADDRESS_SEQ_NUM - Address Sequence Number	
Search Advanced Search	Y EFFDT - Effective Date	
	EFF_STATUS - Status as of Effective Date	
Search Results	NAME1 - Supplier Name	
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Record Personalize Find Vie	EMAILID - Email ID	
Rechame	COUNTRY - Country	
ENDOR - Supplier Header Table	ADDRESS1 - Address Line 1	
VENDORCNICI_LG - Supplier Contact Detail	ADDRESS2 - Address Line 2	
/ENDOR_ADDR - Supplier Address	ADDRESS3 - Address Line 3	
/ENDOR_ADDR_LNG - Supplier Address	ADDRESS4 - Address Line 4	
VENDOR_ADDR_VW3 - Active Supplier Addresses	CITY - City	
/ENDOR_AR - PS/AR Supplier View	NUM1 - Number 1	
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/ENDOR_E - Supplier Header Table	ADDR_FIELD2 - Address Field 2	
/ENDOR_ID_NBRS - Extra Supplier Identifiers	ADDR_FIELD3 - Address Field 3	
ENDOR_INVOICE - Procurement Defaults	COUNTY - County	
/ENDOR_LOC - Supplier Location	STATE - State	
VENDOR_M - Supplier Header Table	POSTAL - Postal Code	
VENDOR_PAY - Supplier Payment Defaults	GEO CODE - Tax Supplier Geographical Code	
VENDOR_SPRO - Services Supplier Info	IN CITY LIMIT - In City Limit	
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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.
	Return

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VENDOR - Supplier Header Table	Add Record	Show Fields	
VENDORCNTCT_LG - Supplier Contact Detail	Add Record	Show Fields	
VENDOR_ADDR - Supplier Address	Add Record	Show Fields	
VENDOR_ADDR_LNG - Supplier Address	Add Record	Show Fields	
VENDOR_ADDR_VW3 - Active Supplier Addresses	Add Record	Show Fields	
VENDOR_AR - PS/AR Supplier View	Add Record	Show Fields	
VENDOR_CNTCT - Supplier Contact Detail	Add Record	Show Fields	
VENDOR_CONTROL - Controls for a set of Supplier	Add Record	Show Fields	
VENDOR_CONVER - Conversations with a Supplier	Add Record	Show Fields	
VENDOR_E - Supplier Header Table	Add Record	Show Fields	
VENDOR_ID_NBRS - Extra Supplier Identifiers	Add Record	Show Fields	
VENDOR_INVOICE - Procurement Defaults	Add Record	Show Fields	
VENDOR_LOC - Supplier Location	Add Record	Show Fields	
VENDOR_M - Supplier Header Table	Add Record	Show Fields	
VENDOR_PAY - Supplier Payment Defaults	Add Record	Show Fields	
VENDOR_SPRO - Services Supplier Info	Add Record	Show Fields	
VENDOR_TYPE - Supplier Type	Add Record	Show Fields	
VENDOR_USER - Supplier User	Add Record	Show Fields	
VENDOR_WTHD - Supplier Withholding Informati	Add Record	Show Fields	
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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.
	Add Record

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additiona	I records	by clicking the records tab	When finished click the fields tab.			
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		ADDR_FIELD2 - Addr	as Field 3	9		~
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Step	Action
13.	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.
14.	The system takes you to the Query tab. From the Query tab you can select individual fields within a record. The <i>fields</i> you select will display as the <i>columns</i> on your report.
15.	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. Ž
16.	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. 20

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.
	Check All
18.	The Uncheck All button deselects all of the fields associated with the record.
	Click the Uncheck All button. Uncheck All
19.	When a field is selected for use in the query, and the query is run, the system returns <u>all</u> 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 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.

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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.
	Cancel
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: <i>Hierarchy Join, Standard (Any) Join, and Related Record Join.</i>
	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.

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Step	Action
36.	The <i>Reorder/Sort</i> 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 <i>New Column</i> fields, on the left side of the table, to <i>change the</i> 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".

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

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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.
	Edit
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.

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

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2 A.NAME1 - Supplier Name	Char40				Supplier	9	Edit			
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4 A.CITY - City	Char30				City	9 <mark>4</mark>	Edit	-		
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Step	Action
52.	Click the NAME1 - Supplier Name Edit button.
	Edit

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3 A.ADDRESS1 - Heading	Aggregate		
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Step	Action
53.	Click the Text option.
	OText

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

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Step	Action
55.	Click the OK button.
	OK

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

Step	Action
63.	Click the Save As link.
	Save As
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". *Query
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 ".
	Description
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 <i>optional</i> 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.
	Run
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.
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 <i>single character</i> 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 <i>10-character value</i> 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 <i>30-character value</i> and uses a specified effective date (i.e., Effective Date is equal to or less that 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 <i>single letter</i> in your query results: A = Active or I = Inactive
77.	Click the EFF_STATUS - Status as of Effective Date Edit button.
78.	Click the Long option.
79.	Click the OK button.
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.
82.	The status for each Supplier now displays as 'Active or Inactive'. Click the Fields tab. Fields
Step	Action
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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 <i>Ord</i> column on the <i>Fields</i> 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.
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.
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.
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.
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.
	Enable Editing
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.
	🖉 Query 🔀
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. *Action - Choose -
100.	Click the Add to Favorites list item.
	NOTE: Your security permission will determine the options available in the Actions list. Add to Favorites
101.	Click the Go button.
	Go
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.
	A Home
104.	This completes <i>Create and Format a Query</i> . 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.
	Main Menu 🔻
2.	Click the Reporting Tools menu.
	Reporting Tools
3.	Click the Query menu.
	Query
4.	Click the Query Manager menu.
	Query Manager
5.	Click the Create New Query link.
	Create New Query
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".
	begins with
9.	Click the Search button.
	Search

Step	Action
10.	Click the VOUCHER - AP Voucher Header Table Add Record link.
	Add Record
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.
	Fields
18.	You can return to the <i>Query</i> tab to <i>add</i> or <i>delete fields</i> .
	Fields may be deleted on the Fields tab by clicking the Delete button (-). However,
10	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
	savea as a Private query. If a Public is modified, you must save the modified query as a Private query
	Save As
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 <i>Owner</i> = <i>Private</i> .
	Enter the desired information into the Query Definition field. Enter " DATE CREATED ".

Step	Action
23.	Click the OK button.
	OK
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 <i>Select Constant From List</i> (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.
	Save
34.	Method 1 Summary:
	 The Business Unit Add Criteria was selected, and A constant Business Unit value was specified on the Edit Criteria Properties panel. 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.
	Criteria
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 <i>Logical</i> field will either be left <i>blank</i> , <i>or</i> the option ' <i>NOT</i> ' 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. Add Criteria
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 <i>Select Record and Field</i> (magnifying glass) button.
	Click the Select Record and Field button.
39.	Click the A.INVOICE_DT - Invoice Date link. A.INVOICE_DT - Invoice Date

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. *Condition Type equal to
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 <u>both</u> 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:
	 Clicked the Add Criteria button on the Criteria tab; Selected INVOICE_DT as the Record Alias.Fieldname for Expression 1; Changed the Condition Type from 'equal to' to 'between'; Entered the Invoice Date range 01/01/2017 through 01/31/2017; The system will retrieve vouchers with an Invoice Date between 01/01/2017 and 01/31/2017 for LSUSH.
	1 nis completes the discussion of Melnoa 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.
	Query
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.
	9
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.
	Select Constant
54.	Click the OK button.
	OK
55.	Click the Criteria tab.
	Criteria

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 <u>all</u> 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.
	Save
58.	Method 3 Summary:
	 Clicked Query tab; Clicked the Use as Criteria button on the Query tab for the POST_STATUS_AP option; Selected 'P' for 'Posted' for Expression 2; and 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 <i>Create a Ouery using Criteria Components</i> .
	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.

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

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 <u>must</u> enter the Business Unit identifiers into the Value field in <u>ALL CAPS</u> .
	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.
	Add Value
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. Add Value
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.
	OK
18.	Click the Save button.
	Save
19.	Click the Return to Search button.
	Return To Search
20.	Enter the desired information into the begins with field. Enter "AVG%".
21.	Click the Search button.
	Search

Step	Action
22.	Click the AVG_GROSS_VCHR HTML link.
	This will open a new window.
	HTML
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.
	Last
24.	Click the Close button.
	NOTE: Make sure you are clicking the bottom Close button.
	×
25.	This completes <i>Edit and/or Delete Criteria</i> .
	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.

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

Step	Action
4.	Click the BUSINESS_UNIT Edit button.
	Edit
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. *Condition Type in list
6.	Click the equal to list item. equal to
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. New Prompt
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 <i>Optional checkbox</i> will remain <i>unchecked</i> 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.
	Edit
22.	Click the Edit Prompt link.
	Edit Prompt
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.
	Optional
24.	Click the OK button.
	OK
25.	Click the OK button.
	OK
26.	Click the Run tab.
	Run
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.
	OK
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.
	Criteria
29.	Click the BUSINESS_UNIT Edit button.
	Edit
30.	Click the Edit Prompt link.
	Edit Prompt

Step	Action
31.	Uncheck the Optional box.
	Click the Optional option.
	Optional
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.
	OK
34.	Click the OK button.
	OK
35.	Click the Run tab.
	Run
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.
	OK

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. Unit HPLMC
40.	Click the OK button.
41.	Query results for the Default Value = HPLMC display. Click the Home button.
42.	This completes <i>Create a Runtime Prompt</i> . 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 <i>key fields</i> as its parent, plus one or more additional keys. Hierarchy Joins are the <i>strongest</i> of the three joins, and are <i>predefined</i> in the system. This means the parent child <i>relationships</i> are already <i>identified and defined</i> 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. Query Manager
6.	Click the Create New Query link. Create New Query
7.	You will first search for the <i>parent</i> table/record. Enter the desired information into the begins with field. Enter " VENDOR ".
8.	Click the Search button. Search
9.	Click the Add Record link. Add Record

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.
	Hierarchy Join
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.
	VENDOR_ADDR - Supplier Address
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. Save As
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. Query Manager
30.	This completes <i>Create a Query using Hierarchy Joins</i> . 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 <u>not</u> <i>predefined</i> in the system. You must <i>manually join</i> the <i>tables/records</i> 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 <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.

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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.
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.
20.	Click the Run 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 Records tab.

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. <i>This should remain as defaulted</i> .
	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.
	OK
36.	Click the Query Manager button.
	Query Manager
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 <i>relationship</i> that has been <i>predefined</i> in the record designer. The Related Record Joins display as a <i>link</i> to the <i>right</i> of the <i>field</i> . The criteria <i>relationship</i> between the fields has already been <i>identified</i> , 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 .

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Step	Action
3.	Click the Create New Query link.
	Create New Query
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.
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.
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.
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.
	ОК
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. Query Manager
34.	This completes <i>Create a Query using Related Record Joins</i> . 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.
	Main Menu 🔻
3.	Click the Reporting Tools menu.
	Reporting Tools
4.	Click the Query menu.
	Query
5.	Click the Query Viewer menu.
	Query Viewer
6.	Enter the desired information into the begins with field. Enter "LSU_VENDORS".
7.	Click the Search button.
	Search
8.	Click the LSU_VENDORS_W_ADDRESS Schedule link.
	Schedule
9.	Enter the desired information into the Run Control ID field. Enter "SCHED_QUERY".

 10. The system defaults you into the Add a New Value tab. A <i>Run Control ID</i> <u>must</u> be added the first time you schedule a query. The <i>Run Control ID</i> is used to access the Process Scheduler. The <i>Run Control ID</i> is: Specific to the User ID; Can be un to thirty (30) characters long; Cannot contain any special characters such as &, \$, %, etc.; and 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 Click the PSNT list item. 15. Click the PSNT list item. ISNI 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 Report Manager 	Step	Action
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 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 Report Manager 19. Click the Report Manager	10.	The system defaults you into the Add a New Value tab. A <i>Run Control ID</i> <u>must</u> be added the first time you schedule a query.
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Click the Reporting Tools button. Reporting Tools ▼ 19. Click the Report Manager menu. Image: Report Manager		results via the Report Manager .
Reporting Tools 19. Click the Report Manager menu. Image: Report Manager		Click the Reporting Tools button.
19. Click the Report Manager menu.		Reporting Tools 🔻
Report Manager	19.	Click the Report Manager menu.
		Report Manager
Step	Action	
------	---	
20.	Click the <i>Link</i> 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.	
	SUPPLIER ADDRESS LIST	
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.	
	A Home	
23.	This completes <i>Schedule a Query</i> .	
	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.

Desktop - Citrix Receiver	
Favorites Main Menu Favorites Keporting Tools Favorites Keporting Tools Keporting Too	😭 Home 🛛 Sign out
LSU Health Financials RPT	
P18.55 W4	New Window Help Personalize Page
Query Manager	
Enter anv information you have and click Search. Leave fields blank for a list of all values.	
Find an Existing Query Create New Query	
*Search By Query Name v begins with	
Search Advanced Search	
	▲ IP II

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.
4.	You <u>must</u> 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.

Step	Action
7.	Click the Go button.
	Go
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".
	User ID:
9.	Click the OK button.
	OK
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.
	ОК
11.	Click the Query Manager button.
	Query Manager
12.	This completes <i>Copy a Query to Another User</i> . 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 <i>Private</i> queries. In this exercise, you will rename the AVG_GROSS_VCHR query.
	NOTE: The renaming of queries can only be performed in Query Manager.

5	J Health Financials RPT									
								New	Window He	elp Personalize Page
ier	y Manager									
ter	any information you have and click Search. Le	ave fields blank for a list of all	values.							
	Find an Existing Query Create New Q	Jery								
	*Search By Query Name	begins with A								
	Search Advanced Search									
	Search Results Too many it	ems met your search criteria	. Only the fi	rst 300 items	s display	ved.				
	*Folder View - All Folders	\checkmark								
С	heck All Uncheck All	*Action -	- Choose		~	Go				
Jue	ry .			Perso	nalize I I	ind Vie	w 100 l	@ 🔜	First	1-30 of 300 Last
	Query Name	Descr	Owner	Folder	Edit	Run to	Run to	Run to	Schedule	Definitional References
elect										
elect	AVG_GROSS_VCHR	AVERAGE GROSS VOUCHER	Private		Edit	HTML	Excel	XML	Schedule	Lookup References
	AVG_GROSS_VCHR A	AVERAGE GROSS VOUCHER Off Budget Funds	Private Public		Edit Edit	HTML HTML	Excel Excel	XML XML	Schedule Schedule	Lookup References
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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. *Action Choose

Step	Action
4.	Click the Rename Selected list item.
	Rename Selected
5.	Click the Go button.
	Go
6.	Enter the desired information into the New Name field. Enter
	"AVG_GRU85_VUUCHER".
7.	Click the OK button.
	OK
8.	On the Query Manager page, you may confirm the query name has changed from
9.	This completes <i>Rename a Query</i> .
	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.

workes Wain Menu * > Reporting Tools * > Query * > Query Marager LSU Health Financials RPT Prass SW3 New Window Heip Personalize Page uery Manager Inter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Query Name Search By Query Name Search By Query Name Descr Owner Folder Edit HTML Excel XML Schedule Lookup References Clear Favorites List	Desktop - Citrix Receiver										d x
LSU Health Financials RPT Prastava Law Window Help Personalize Page Image: Comparison you have and click Search. Leave fields blank for a list of all values.	Favorites Main Menu	> Reporting Tools ▼ > Q	uery 🔻 > Quer	y Manager						🏫 Home	Sign out
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				3	_	_					2:55 PM

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 <i>review</i> you <i>Private queries</i> 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.
	Delete Selected
11.	Click the GO button.
	Go
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.
	Yes
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
ВООК	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 Receiva	ble
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
	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

nequisitions	
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	