

Advanced ARC Reporting

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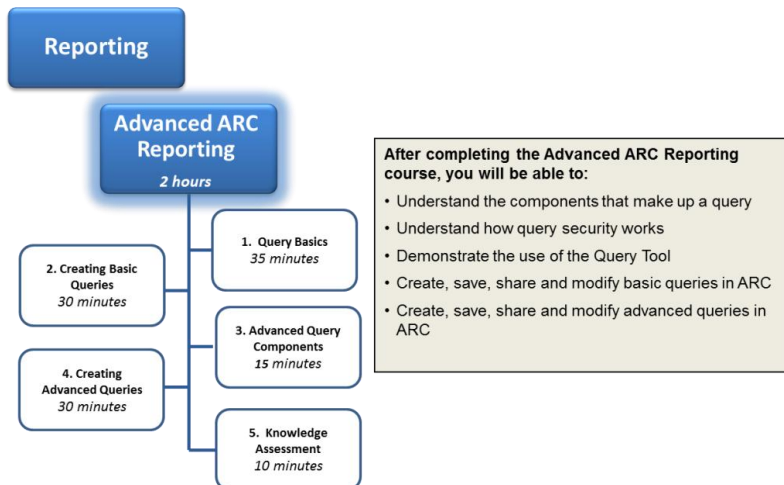


Advanced ARC Reporting

Advanced ARC Reporting

This is the *Advanced ARC Reporting* course within the *Reporting* curriculum.

If you need a reminder on how to navigate through this course using ARC's web-based training tool (WBT), click [here](#) for a quick reference guide.





Query Basics

This is the *Query Basics* lesson of the *Advanced ARC Reporting* course. Upon completion of this lesson, you will be able to:

- Understand the use of the Query Tool
- Identify what types of data can be retrieved
- Run an existing query

Estimated Time to Complete Lesson: 35 minutes



Query Overview

The PeopleSoft Query is an end user reporting tool that allows you to extract precise information from the ARC database without having to write SQL code.

- Query: Request for information retrieval from one or more data sources
- SQL (Structured Query Language): Programming language to manage data within databases
- PeopleSoft Query Manager is a tool to help users build SQL statements and view query output



How the Query Tool Works

The Query Tool uses SQL in order to retrieve data from the database.

SQL (Structured Query Language) is a programming language designed for managing data within databases. The data is stored in tables and the relationships among the data are also stored in tables. The data can be accessed or reassembled in many different ways without having to change the table forms. The Query Tool uses User Input in order to generate SQL. When a Query is run, this SQL is executed at the database level, and the results are returned to the user through the Query Tool.

Database Elements

- **Tables (Records):** Tables are composed of columns and rows. These tables are called Records in PeopleSoft.
- **Columns (Fields):** Columns are single pieces of information for each row, they are the fields (Headers) in the database.
- **Rows (Field Data):** A row contains all the information for a unique combination of key values on the table, they are the data that is contained in the fields.
- **Keys:** Keys are unique identifiers for a set of data— a combination of keys can never be repeated.

Basic SQL Select Statement:

```
SELECT [Column(s)] ← Selection Criteria (Fields)
FROM [Record Name] ← Source Criteria (Records)
WHERE [Condition] ← Input Criteria (Criteria)
```



Benefits

Some of the benefits of the Query tool are as follows:

- Reporting flexibility
- Queries can be one-time, ad-hoc or can be used repeatedly
- User friendly functionality



Query Security

Public versus Private Queries

Public Queries are visible to anyone who has access to the records in a specific query. Private queries are only visible to the specific user who has created it, or has been given access through the copy function.

Row Level Security

When a user runs a query, the query is subject to Row Level Security. Row Level Security is enabled for Business Units (COLUM, COCIN, REIDH, etc). This means that if the user doesn't have access to a particular Business Unit, the query will not return any rows of data associated with that Business Unit.

Secured Records

In order to enable ChartField Security on queries (i.e. allow users only to see data in specific accounts and departments) all of the transactional tables are marked as secured. You can identify a secured record by looking at the 'View SQL' tab. If there a table there that you did not join, then it is a security record. This ensures that the query will return only transactions with departments and accounts that you have access to.



Query Viewer

Query Viewer is the place to run and view queries. Upon searching for a query, you can choose to run the query immediately and view the results in a new browser window or to schedule it to be run at a later time (or predefined schedule).

Queries Viewer provides the ability to:

- Search for a query
- Preview a query in the active browser window
- Run a query and display results in a new browser window
- Export and print a query
- Schedule a query

Navigation: Reporting Tools > Query > Query Viewer

A screenshot of the ARC Query Viewer web interface. At the top is a blue header bar with the ARC logo on the left. Below the header is a breadcrumb navigation bar showing "Favorites | Main Menu > Reporting Tools > Query > Query Viewer". The main content area has the title "Query Viewer" in blue. Below the title is a text prompt: "Enter any information you have and click Search. Leave fields blank for a list of all values." The search section includes a label "*Search By:" followed by a dropdown menu currently showing "Query Name". To the right of the dropdown is the text "begins with" and an empty text input field. At the bottom left of the search section is a blue "Search" button, and to its right is a blue link labeled "Advanced Search".



Query Manager

Query Manager is the administrative area where you can build, search for, organize and edit queries.

In addition to the Query Viewer capabilities, Query Manager provides the ability to:

- Create New Queries
- Delete Queries
- Edit Queries
- Rename Queries
- Copy Queries
- Move Queries across folders

Navigation: Reporting Tools > Query > Query Manager

ARC

Favorites Main Menu > Reporting Tools > Query > Query Manager

Query Manager

Enter any information you have and click [Search](#). Leave fields blank for a list of all values.

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

*Search By: Query Name begins with

[Search](#) [Advanced Search](#)

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

Query Search

You can either use the 'Basic Search' or the 'Advanced Search' when searching for existing queries. Both search types allow you to select the following 'search by' criteria: access group name, description, folder name, owner, query name, type, uses field name, uses record name.

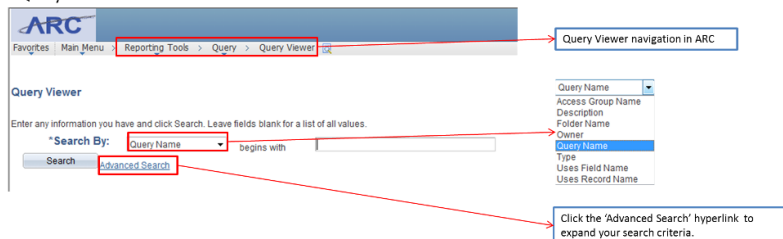
The Basic Search is useful when you know what the query name or the description of the query begins with.

- The search function is not case sensitive
- You can enter partial or full name in this field. You can leave the field blank and click on the search button in which case the system will retrieve all the Queries available. (**Note:** Clicking Search without entering any description will return the only first 300 queries in the system)
- The following symbols are used as wild cards '%' and '_'

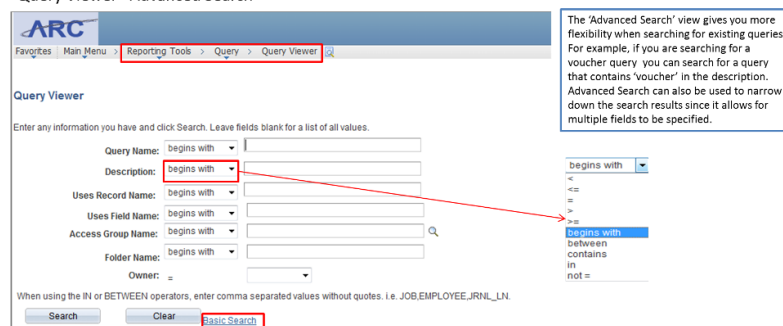
The Advanced Search allows for more flexibility. You can specify additional search methods for the desired field(s) (e.g. equals, does not equal, contains etc).

- The advanced search enables you to perform a narrower search by using one or more search by criteria and selecting from a choice of conditions for each search criterion

Query Viewer - Basic Search



Query Viewer - Advanced Search





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Basic Search

When using the basic search screen, keep in mind that all query names begin with 'CU'. You can begin to narrow down the search by specifying which module owns the query (e.g. KK, GL, AP, PO, PC).

The image below shows the search results for query names that begin with 'CU_AP'.

Please note that you will only be able to search for queries that you have been granted access to.

Query Viewer

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

Search By:

Query Name

begins with

CU_AP

Search

Advanced Search

Search Results

Folder View: -- All Folders --

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
CU_AP_APPRV_FACILITIES	Dept Approvers for Facilities	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_BUDGET_CHECK_ERROR_VOUCH	Budget Check Error Vouchers	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_CF_DESCR	AP Query with Chartfield Desc	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_DENIED_VOUCHERS	Denied Vouchers	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_ESCHEATED_PYMNTS	Escheated Payments	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_INACTIVE_VNDR	Inactive Vendors	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_INFOED_VENDOR_LIST	InfoEd Vendors and Sponsors	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_MATCH_EXCEPTION_VOUCHERS	AP-Match Exception Vouchers	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_PATIENT_REF_DETAIL	Patient Refunds Detail Recon	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_PATIENT_REF_SUMMARY	Patient Refunds Summary Recon	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_PCARD_VCHR_CLOSE_DELETE	Deleted and Closed PCard Vchrs	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_PREF_VNDR	Preferred Vendors	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_RECYCLED_VOUCHERS	AP-Recycled Vouchers	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_TEST_1099_BALANCE	Validate Generate Payments_05	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_TRAN_BY_DATE_CLEARED	Transactions by Date Chk Clear	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_UNAPPR_VNDR	Unapproved Vendors	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_UNPOSTED_VCHR_BUD_CHKD	Unposted Voucher Budg Checked	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_VCHR_UNPAID_POST	Vouchers Posted But Unpaid	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_WITHD_COMPARE	Withholding Compare Report	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_WITHD_VNDR	Withholding Applicable Vendors	Public		HTML	Excel	XML	Schedule	Favorites

You have several option when selecting a query to run:

- Run to HTML
- Run to Excel
- Schedule
- Add to Favorites

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Advanced Search

The Advanced Search screen gives you additional flexibility when searching for existing queries. You can specify one or more fields either to broaden or narrow down your search.

In the example below, we are searching for all queries that contain 'voucher' in the description field.

ARC

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

Query Viewer

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

Query Name: begins with
Description: contains VOUCHERS
Uses Record Name: begins with
Uses Field Name: begins with
Access Group Name: begins with
Folder Name: begins with
Owner: =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNIL_LN.

Search Clear Basic Search

Search Results

*Folder View: -- All Folders --

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
AP_CRED_VCHR	List of Credit Vouchers	Public		HTML	Excel	XML	Schedule	Favorites
BTF_BT8_VOUCHER	Book-to-Bank Vouchers	Public		HTML	Excel	XML	Schedule	Favorites
BTF_KK_SOURCE_HDR_GL_PO_AP	POs, Vouchers, J/Is & B/Is	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_BUDGET_CHECK_ERROR_VOUCH	Budget Check Error Vouchers	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_DEINED_VOUCHERS	Denied Vouchers	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_DELETED_VCHR	List of Deleted Vouchers	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_DENIED_VOUCHERS	Denied Vouchers	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_MATCH_EXCEPTION_VOUCHERS	AP-Match Exception Vouchers	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_RECYCLED_VOUCHERS	AP-Recycled Vouchers	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_VCHR_PEND_APP_AMT	Vouchers Pending Appr by Amt	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_VCHR_PEND_APP_DEPT	Vouchers Pending Appr by Dept	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_VCHR_PEND_APP_ORIG	Vouchers Pending Appr by Orig	Public		HTML	Excel	XML	Schedule	Favorites
CU_AP_VCHR_UNPAID_POST	Vouchers Posted But Unpaid	Public		HTML	Excel	XML	Schedule	Favorites
CU_PC_UNPAID_SPONS_VCHR	PC - Unpaid Sponsored Vouchers	Public		HTML	Excel	XML	Schedule	Favorites
POY1052_CONTRACT_VOUCHERS	POY1052-Contract Vouchers	Public		HTML	Excel	XML	Schedule	Favorites
UPG_APY02	Exception Vouchers	Public		HTML	Excel	XML	Schedule	Favorites
UPG_GFAPX02	Vouchers to be bcm-ed	Public		HTML	Excel	XML	Schedule	Favorites

Output Options

Once you locate the query you wish to run, you have the following options:

- Run the query to HTML (query results are displayed in a new web page)
- Run the query to Excel (query results are displayed in an Excel document)
- Run the query to XML (query results are displayed in an XML document)
- Schedule the query to be run within a specific date range
- Add the query to your list of Favorites

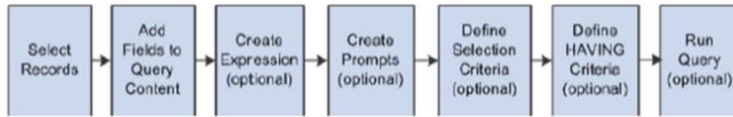
Customize Find View All First 1-30 of 32 Last				
Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
HTML	Excel	XML	Schedule	Favorite
HTML	Excel	XML	Schedule	Favorite
HTML	Excel	XML	Schedule	Favorite
HTML	Excel	XML	Schedule	Favorite

Note: Queries can also be added to a favorite list, doing so allows you to create a separate logical list for some of your most frequently accessed Queries.

My Favorite Queries are listed in a separate group box below the Query search results box. You can remove the Queries at any time from the list by clicking on the Remove button.

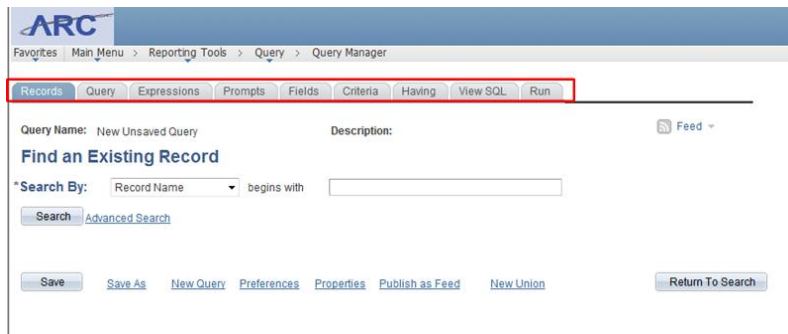
Query Components

This process flow illustrates the Query business processes:



PeopleSoft Query business process flow

Each of these processes have its own tab in the Query Manager page:



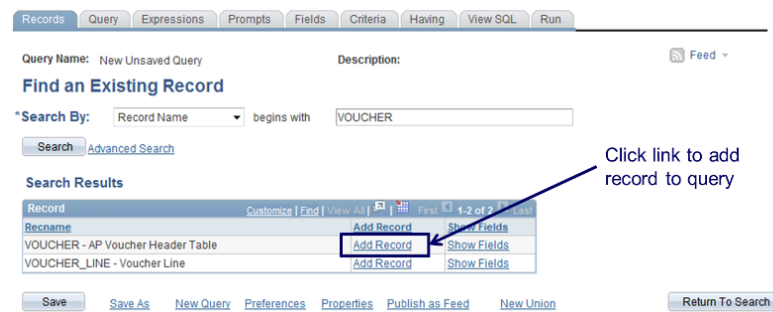
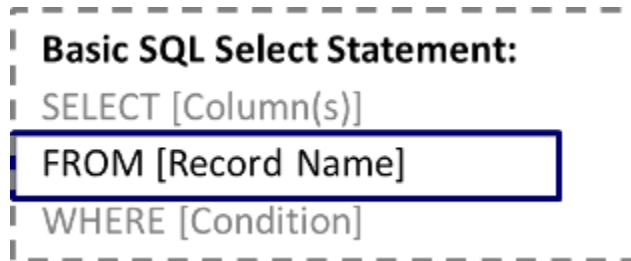
In this lesson we will introduce Records, Query, Fields, Criteria, View SQL and Run Query. Expression, Prompts, and Having will be covered in the *Advanced Query Components* lesson.

Records

The first step in creating a query is adding records.

Records are added via the 'Records' tab.

On the 'Records' tab you will select the records (tables) to be included in the query. You can search for records via the basic or the advanced search windows.



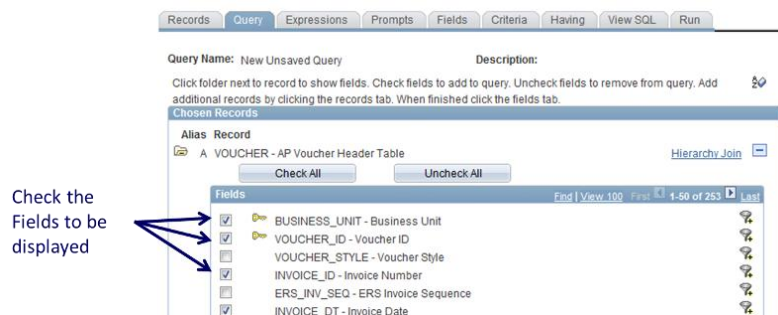
Query

The second step when creating a query is to select the Fields to display.

- Fields are selected via the Query tab
- Check fields to be displayed
- Do not select fields here that will be used as conditions but not displayed
- You can add additional records by performing joins.

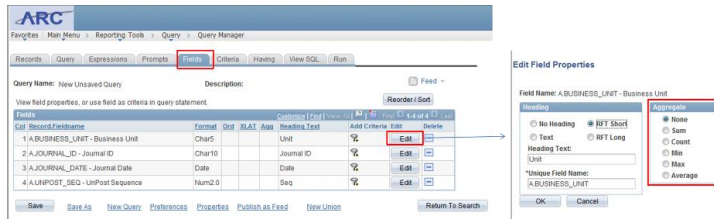
Basic SQL Select Statement:

```
SELECT [Column(s)]  
FROM [Record Name]  
WHERE [Condition]
```



Fields

The Fields tab displays the selected fields for the output in the query. Edit field properties, such as column number, heading text, sort order and aggregate functions. You can delete a field from the query and you can also select a field on which to set criteria.



Aggregate Functions

- Sum – Sums by all the other fields
- Count – Counts by all the other fields
- Min – finds the minimum with the same fields
- Max – finds the maximum with the same fields
- Average – finds the average with the same fields

Translate Values

These values replace a simple status ('A' or 'P') with the 'Short' or 'Long' Descriptions ('Approved' or 'Pending') name for that value in a query. You can Effective Date these descriptions.

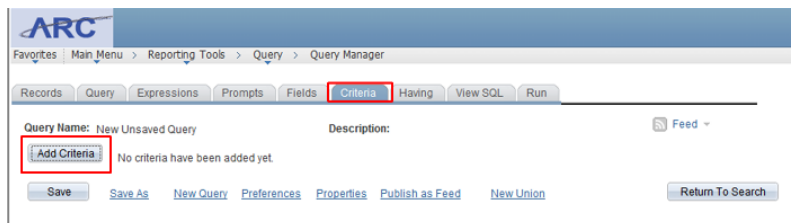
Criteria

The third step when creating a query is to add criteria.

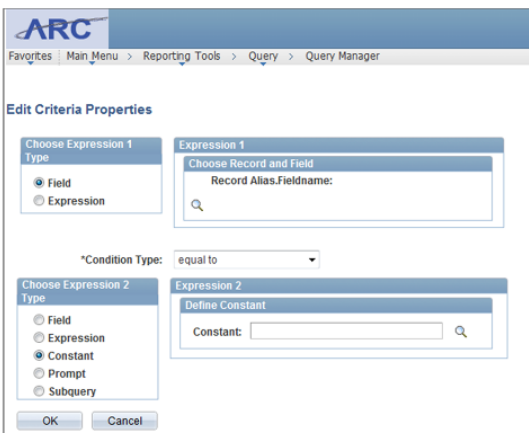
- Entered via Criteria tab
- Can view translates for a field
- Ability to group conditions using AND/OR statement

Basic SQL Select Statement:

```
SELECT [Column(s)]  
FROM [Record Name]  
WHERE [Condition]
```



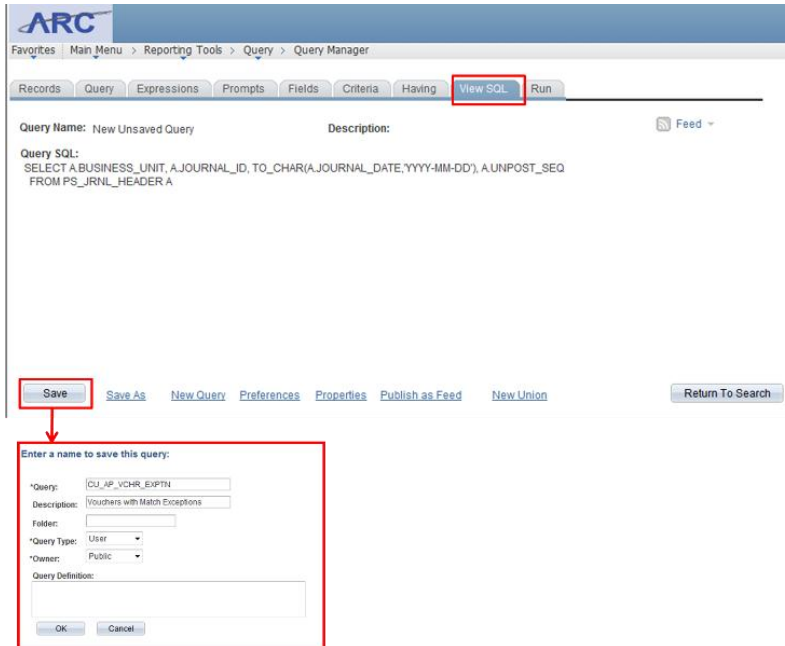
The screenshot shows the ARC Query Manager interface. The 'Criteria' tab is selected and highlighted with a red box. Below the tab, there is a section for 'Query Name' (New Unsavd Query) and 'Description'. A red box highlights the 'Add Criteria' button. Below this button, it says 'No criteria have been added yet.' There are also buttons for 'Save', 'Save As', 'New Query', 'Preferences', 'Properties', 'Publish as Feed', 'New Union', and 'Return To Search'.



The screenshot shows the 'Edit Criteria Properties' dialog box. It has two main sections: 'Choose Expression 1 Type' and 'Choose Expression 2 Type'. In the first section, 'Field' is selected. In the second section, 'Constant' is selected. There are also search boxes for 'Record Alias.FieldName' and 'Constant'. A dropdown menu for '*Condition Type:' is set to 'equal to'. At the bottom, there are 'OK' and 'Cancel' buttons.

View SQL


The View SQL page displays the SQL SELECT statement that Query Manager creates after you create your query on the previous pages.



ARC

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

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

Query Name: New Unsavd Query Description:  Feed ▾

Query SQL:
 SELECT A.BUSINESS_UNIT, A.JOURNAL_ID, TO_CHAR(A.JOURNAL_DATE,'YYYY-MM-DD'), A.UNPOST_SEQ
 FROM PS_JRNL_HEADER A

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

Enter a name to save this query:

*Query: CU_AP_VCHR_EXPTN
 Description: Vouchers with Match Exceptions
 Folder:
 *Query Type: User ▾
 *Owner: Public ▾
 Query Definition:

OK Cancel

Saving a Query

Enter a name to save this query:

*Query:

Description:

Folder:

*Query Type:

*Owner:

Query Definition:

Query: The name of your query is what you can use to search for it. Please remember to name it according to the following naming convention:

Part	Description	Example
1	Query names should always begin with 'CU'	CU
2	Identifies the owning module	GL, KK, PC, AP, PO
3	Brief description of the query	Journals, Status (active, inactive, deleted etc)
4	Describes any filters or sorts in the query	BY DATE, OPRID, etc
5	Identifies what type of transaction the query returns	Reconciliation, Allocation

****Private and public queries can not have the same name**

Description: This is a description that all users will see when searching for the query

Folder: You can create folders and add queries to them. This can help with your searching – for instance if you have a certain set of GL or AP queries, you can create folders, and filter your searches by them.

Query Type: Defines the purpose of the query. There are five types: user, reporting, process, role, archive, ps/nVision

Owner: This is where you define the query a public or private

Query Definition: This is a long description that only users with Query Manager Access will be able to see



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Run

- Use the Run tab when ready to view output
- Note the column headers and sort order.

	Unit	Journal ID	Date	Seq
1	COLUM	CNV0000200	08/31/2011	0
2	COLUM	CNV0000201	01/31/2012	0
3	COLUM	CNV0000225	02/29/2012	0
4	COLUM	CNV0000241	06/29/2011	0
5	COLUM	CNV0000252	06/30/2011	0
6	COLUM	CNV0000253	07/01/2012	0
7	COLUM	CNV0000255	06/28/2012	0
8	COLUM	CNV0000259	06/27/2012	0
9	COLUM	CNV0076366	07/02/2012	0
10	COLUM	CNV0076372	03/31/2012	0
11	COLUM	COM0076687	05/16/2012	0
12	COLUM	COM0077551	06/07/2012	0
13	COLUM	COM0077621	05/16/2012	0
14	COLUM	COM0077628	05/16/2012	0
15	COLUM	CSH0076263	05/09/2012	0
16	COLUM	CSH0076279	05/09/2012	0
17	COLUM	CSH0077555	05/09/2012	0
18	COLUM	CSH0077631	05/09/2012	0
19	COLUM	CTV0076065	05/01/2012	0
20	COLUM	CTV0077468	05/01/2012	0
21	COLUM	CTV0077556	05/01/2012	0
22	COLUM	FPO0075388	04/01/2012	0
23	COLUM	FPO0075454	04/01/2012	0



Creating Basic Queries

This is the *Creating Basic Queries* lesson of the *Advanced ARC Reporting* course. Upon completion of this lesson, you will be able to:

- Create and run a simple query using Query Manager functionality
- Demonstrate how to use comparison values on a query
- Distinguish the different comparison operators that can be used to specify query criterion
- Demonstrate how to run and save queries
- Demonstrate how to view the underlying SQL code of a query

Estimated Time to Complete Lesson: 30 minutes



Group Exercise: Creating a Query

In this scenario you will learn how to create a basic query.

- Voucher Count Example

Training Guide

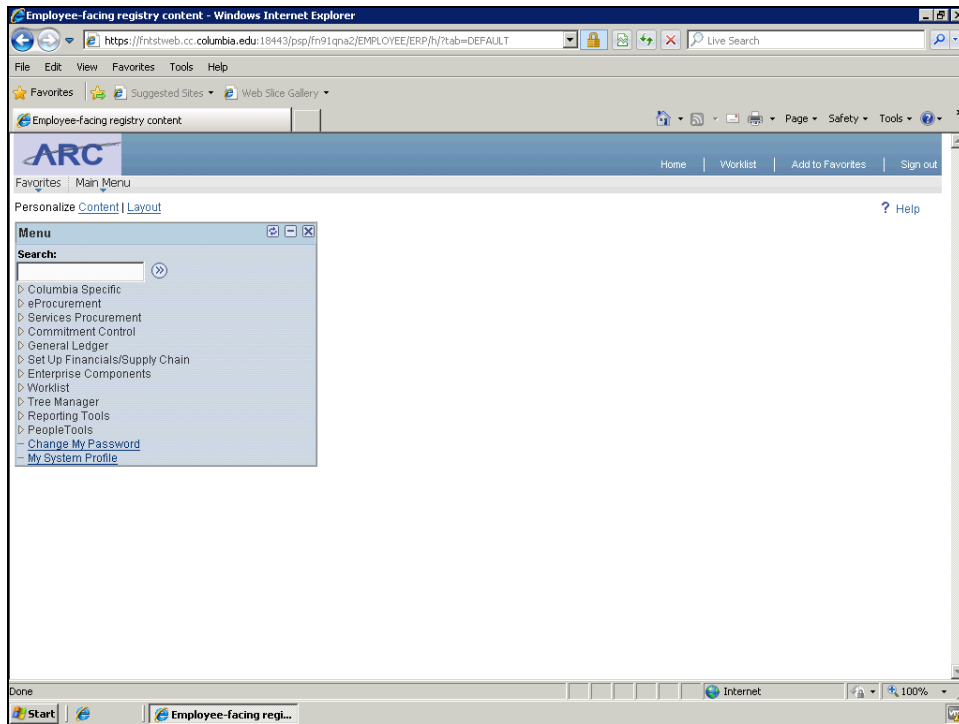
Advanced ARC Reporting




Creating a Basic Query

Procedure

Welcome to the *Creating a Basic Query* topic. In this topic you will learn how to create a basic query in ARC.

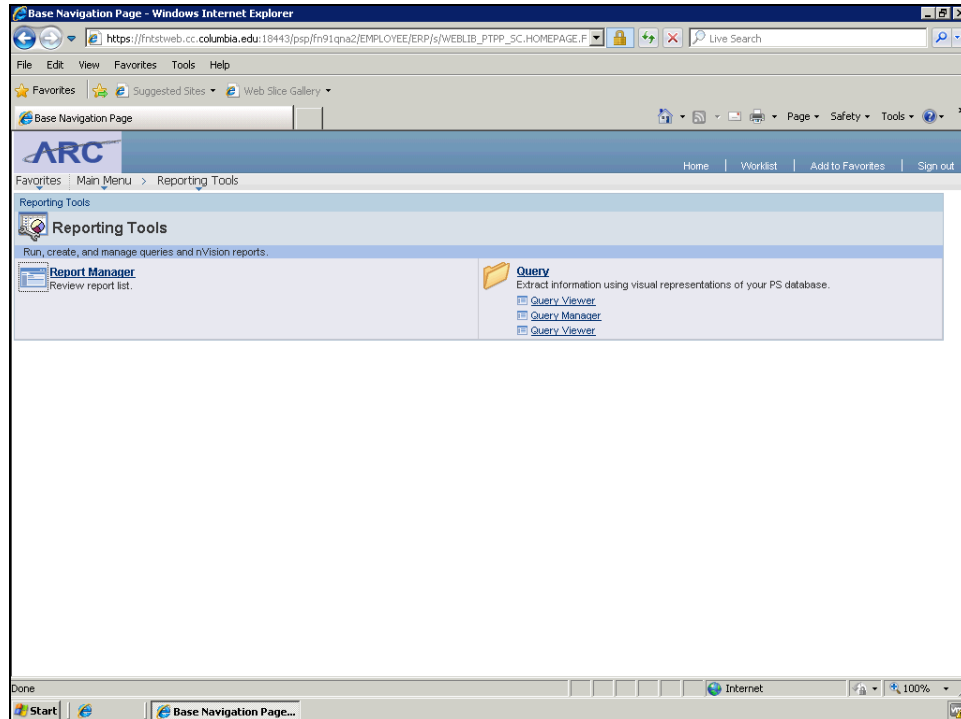



Step	Action
1.	Click the Reporting Tools link. 

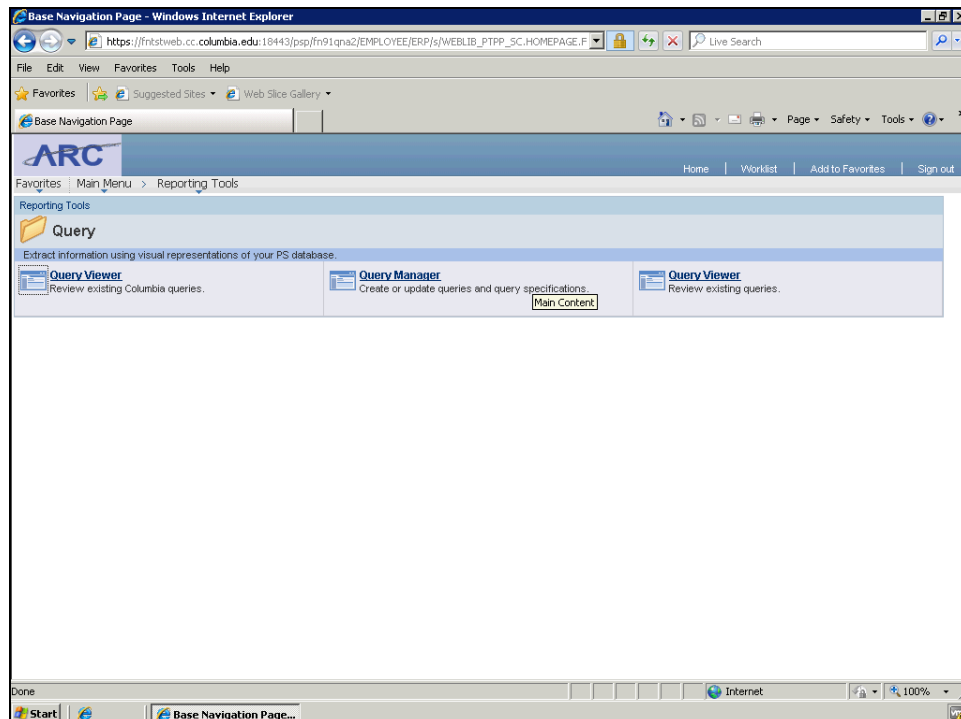


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Step	Action
2.	Click the Query link. 

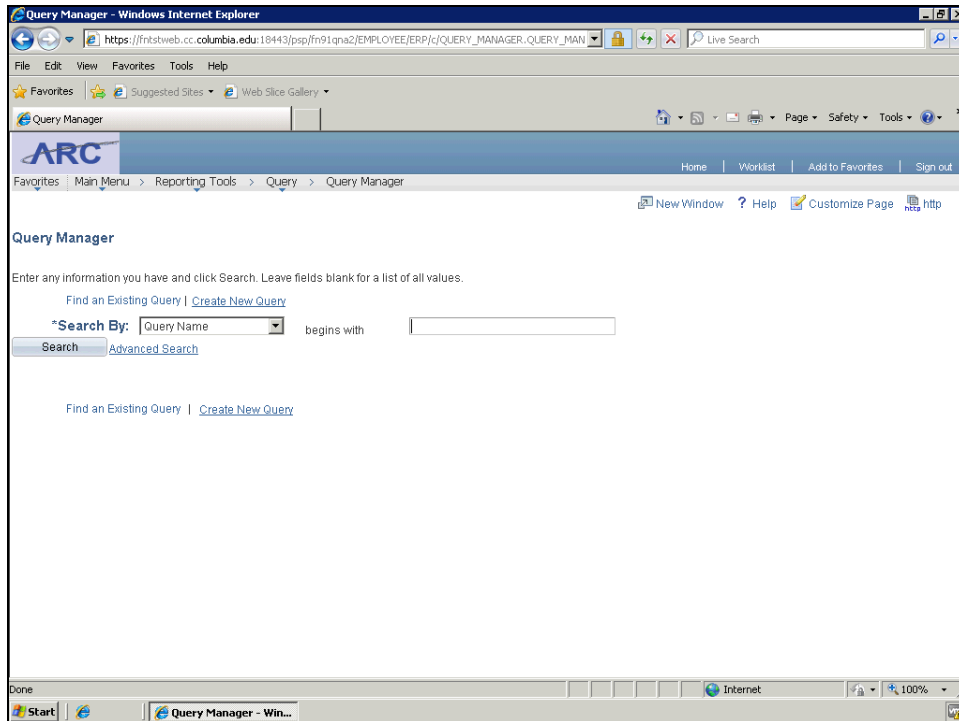


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Step	Action
3.	Click the Query Manager link. Query Manager



Step	Action
4.	Click the Create New Query link. Create New Query



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Query Manager - Windows Internet Explorer

https://frstweb.cc.columbia.edu:18443/psp/fr91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MAN

File Edit View Favorites Tools Help

ARC

Home | Worklist | Add to Favorites | Sign out

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

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Query Name: New Unsavd Query Description: Feed

Find an Existing Record

*Search By: Record Name begins with

Search Advanced Search

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

Step	Action
5.	Enter the desired information into the begins with field. Enter "VOUCHER" .

Query Manager - Windows Internet Explorer

https://frstweb.cc.columbia.edu:18443/psp/fr91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MAN

File Edit View Favorites Tools Help

ARC

Home | Worklist | Add to Favorites | Sign out

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

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Query Name: New Unsavd Query Description: Feed

Find an Existing Record

*Search By: Record Name begins with VOUCHER


Search Advanced Search

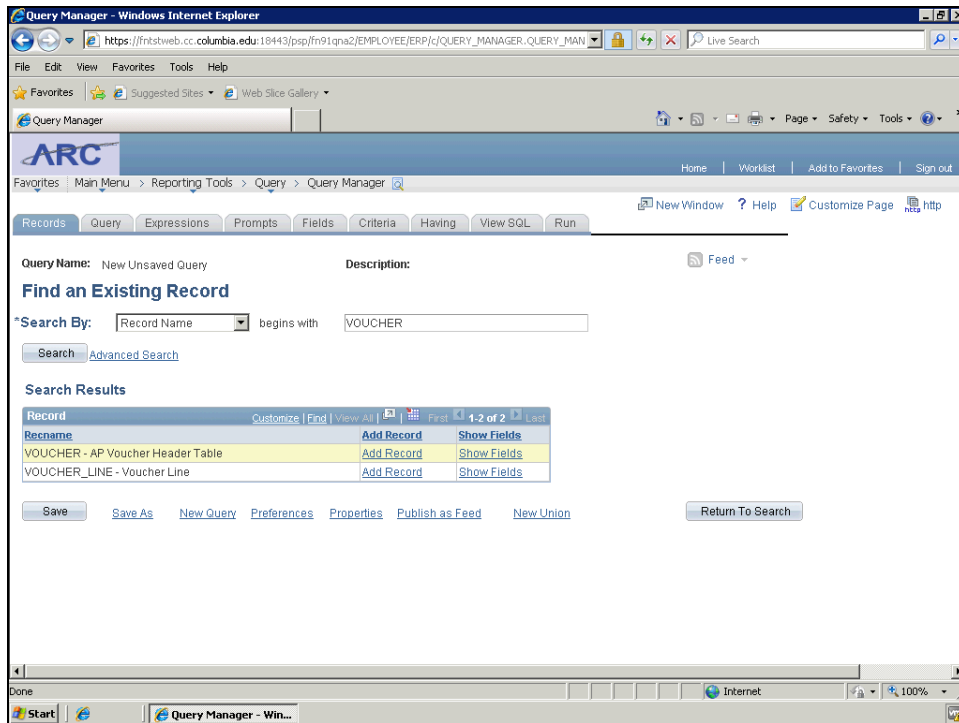
Save Save As New Query Preferences Properties Publish as Feed New Union Return To Search


Training Guide

Advanced ARC Reporting



Step	Action
6.	Click the Search button. 

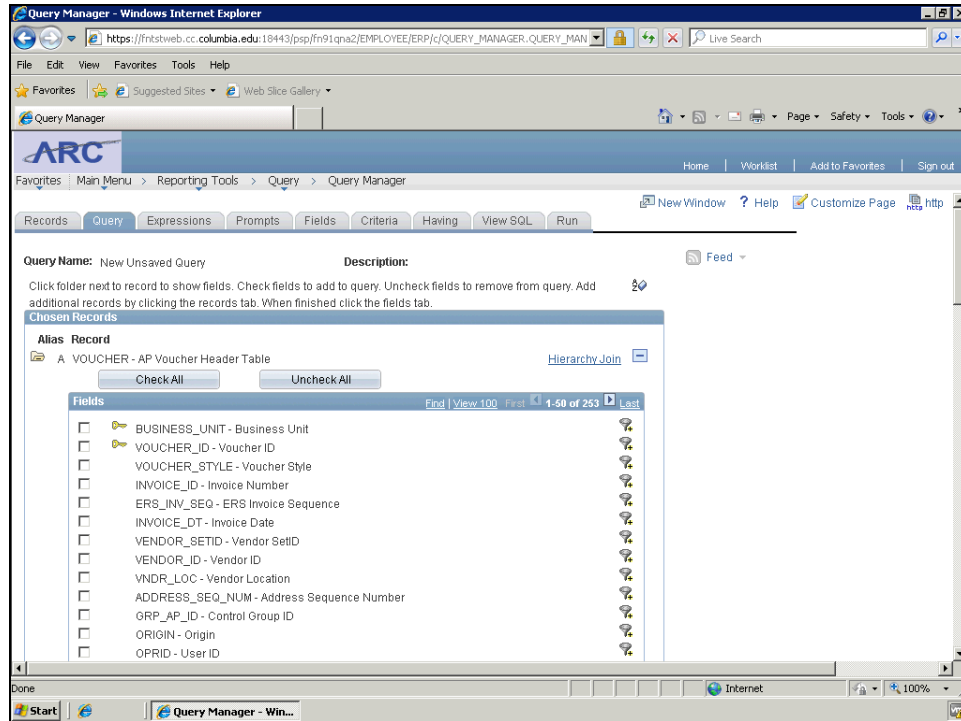


Step	Action
7.	Click the Add Record link. 

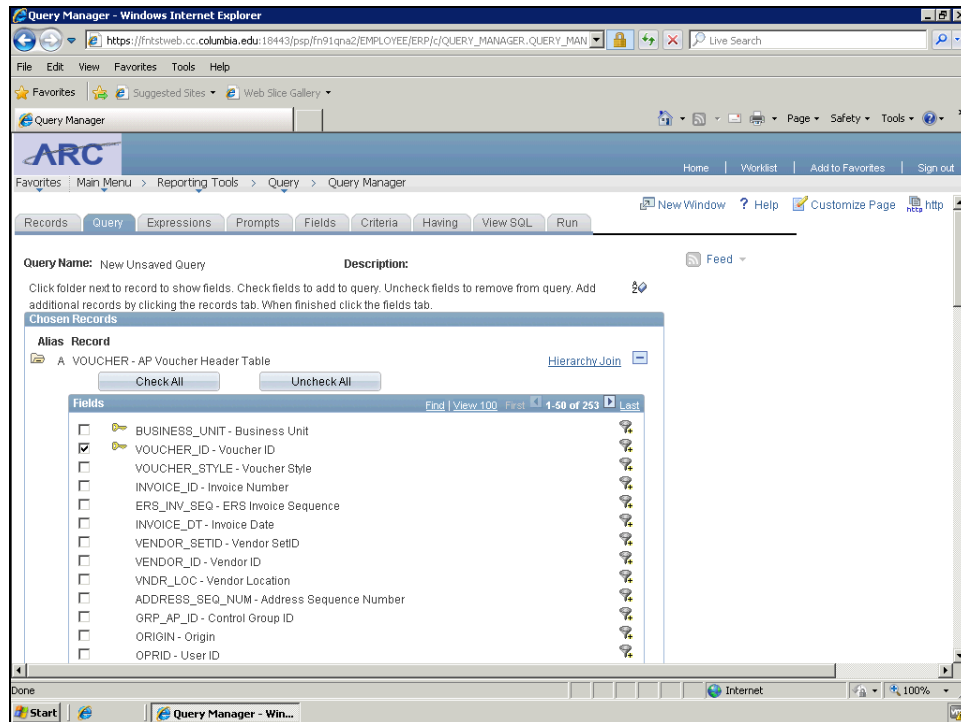


Training Guide

Advanced ARC Reporting




Step	Action
8.	Click the Select option. <input type="checkbox"/>

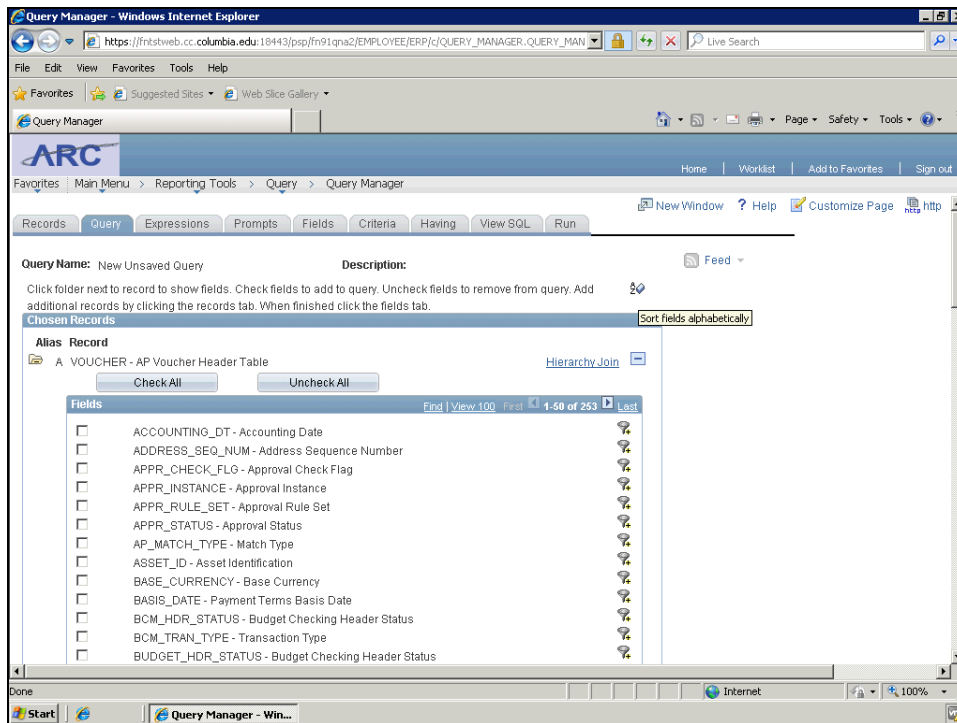



Training Guide

Advanced ARC Reporting



Step	Action
9.	Click the Sort fields alphabetically button. 

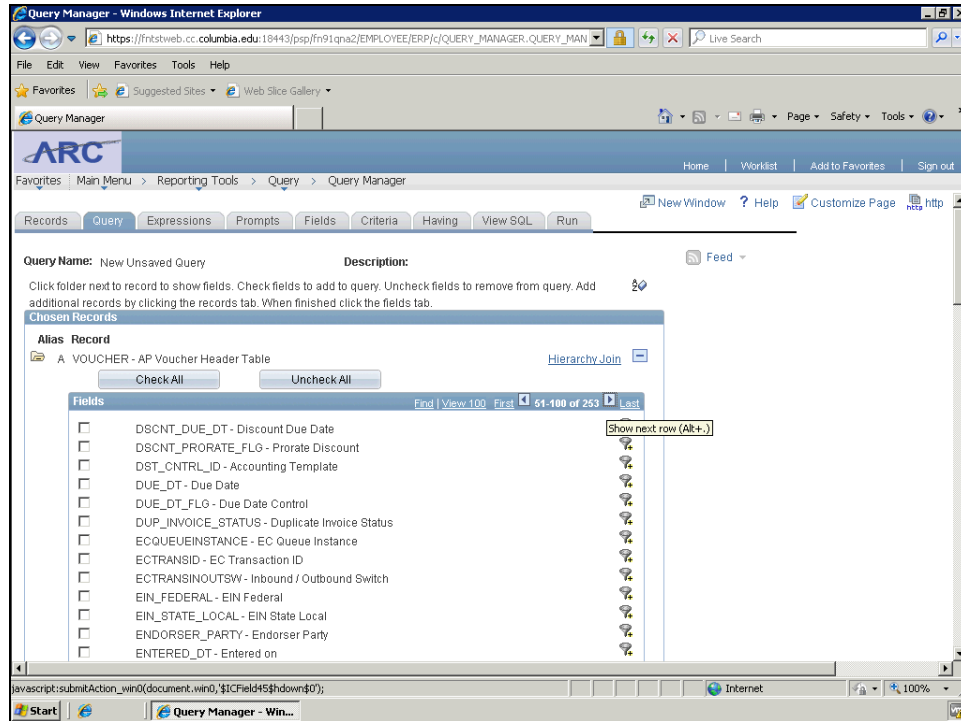


Step	Action
10.	Click the Show next row (Alt+.) button. 

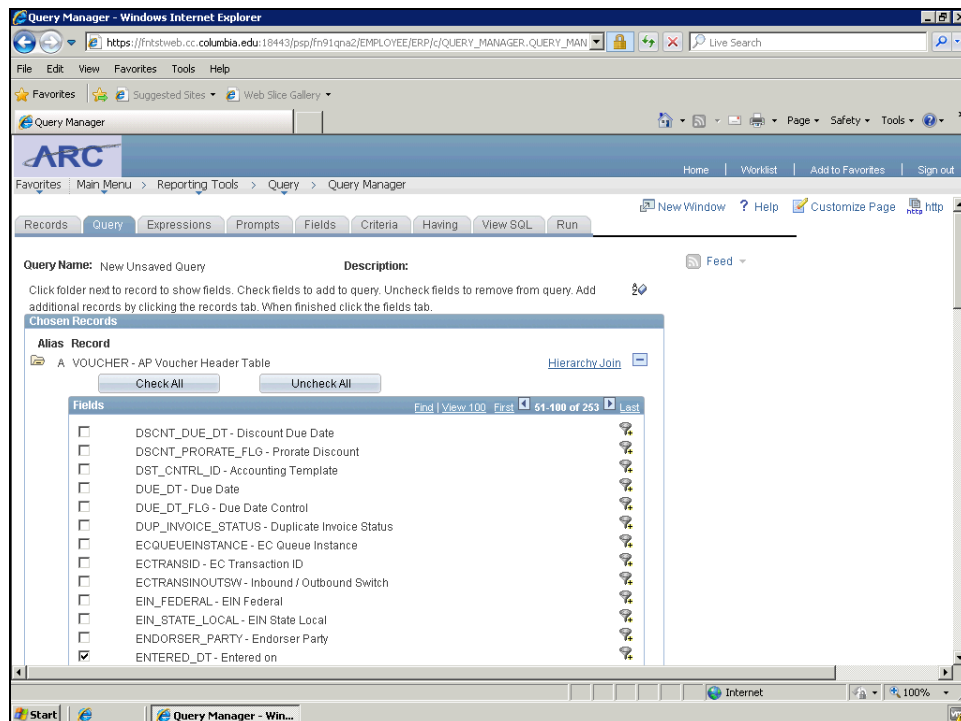


Training Guide

Advanced ARC Reporting



Step	Action
11.	Click the Select option. <input type="checkbox"/>

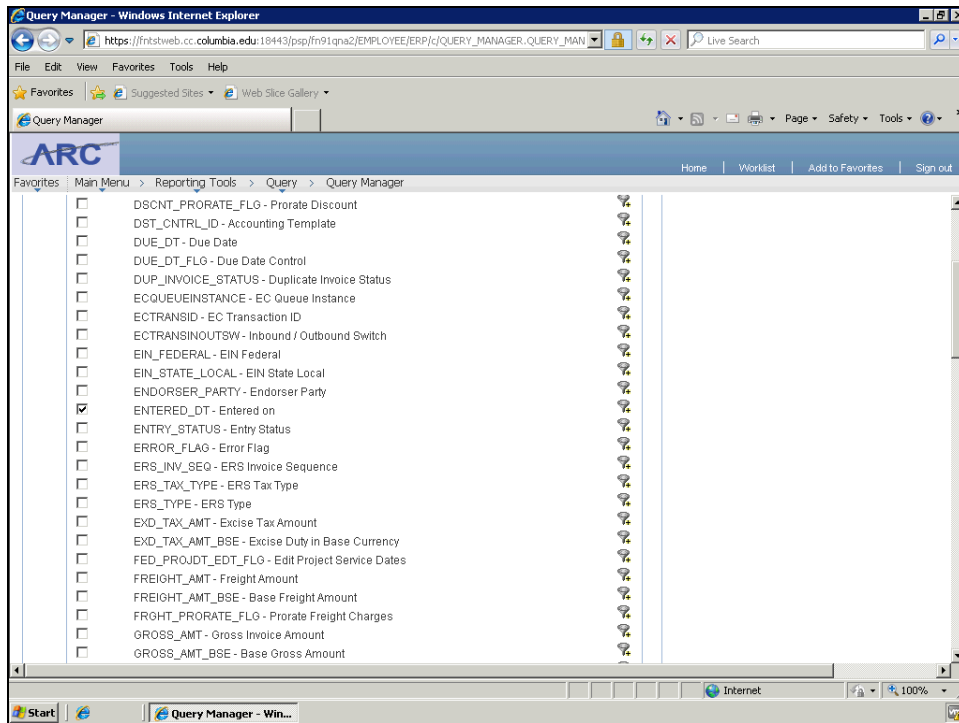


Training Guide

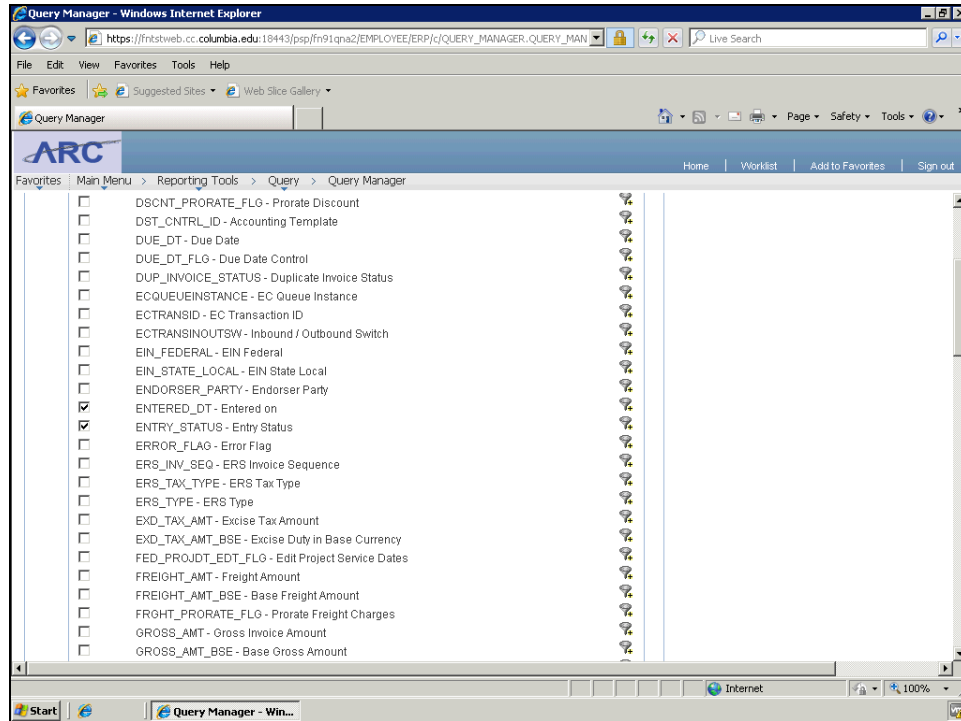
Advanced ARC Reporting



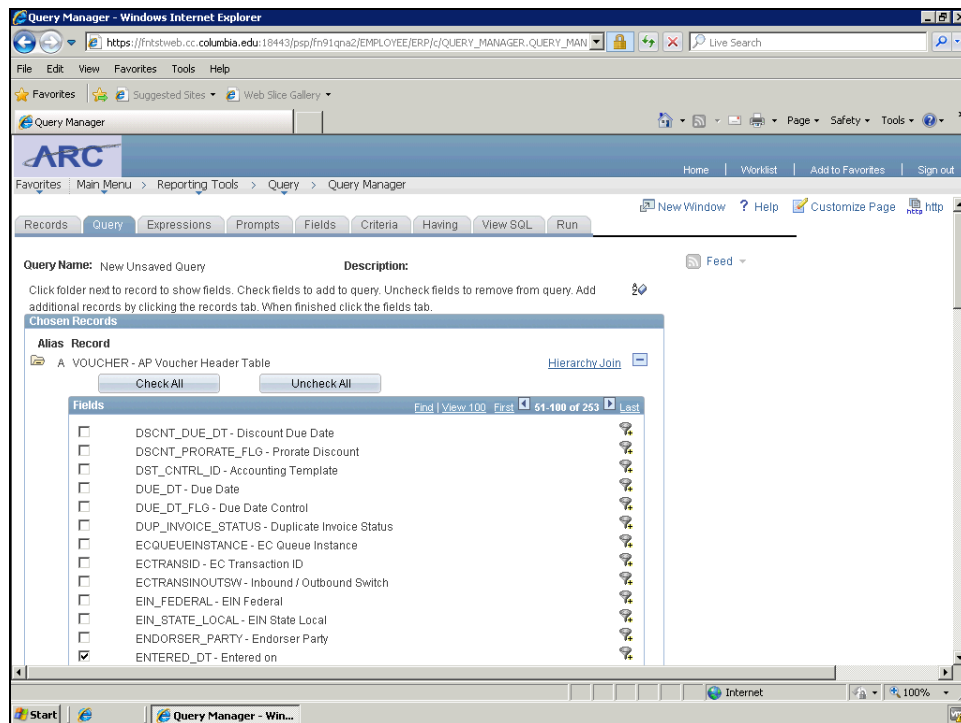
Step	Action
12.	Click the scrollbar.



Step	Action
13.	Click the Select option. <input type="checkbox"/>



Step	Action
14.	Click the scrollbar.

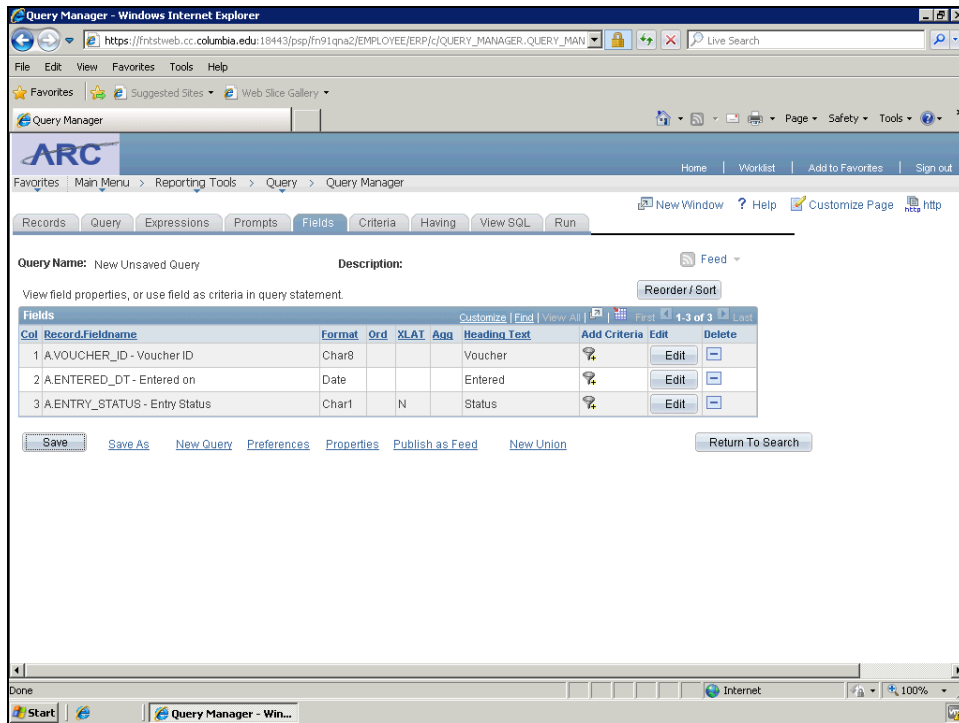


Training Guide

Advanced ARC Reporting



Step	Action
15.	Click the Fields tab. <div>Fields</div>



Step	Action
16.	Click the Reorder / Sort button. <div>Reorder / Sort</div>



Training Guide Advanced ARC Reporting

Edit Field Ordering

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

New Column	Column	Record.FieldName	Order By	Descending	New Order By
	1	A.VOUCHER_ID - Voucher ID		<input type="checkbox"/>	
	2	A. ENTERED_DT - Entered on		<input type="checkbox"/>	
	3	A. ENTRY_STATUS - Entry Status		<input type="checkbox"/>	

OK Cancel

Step	Action
17.	Click in the New Column field . <input type="text"/>

Edit Field Ordering

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

New Column	Column	Record.FieldName	Order By	Descending	New Order By
	1	A.VOUCHER_ID - Voucher ID		<input type="checkbox"/>	
	2	A. ENTERED_DT - Entered on		<input type="checkbox"/>	
	3	A. ENTRY_STATUS - Entry Status		<input type="checkbox"/>	

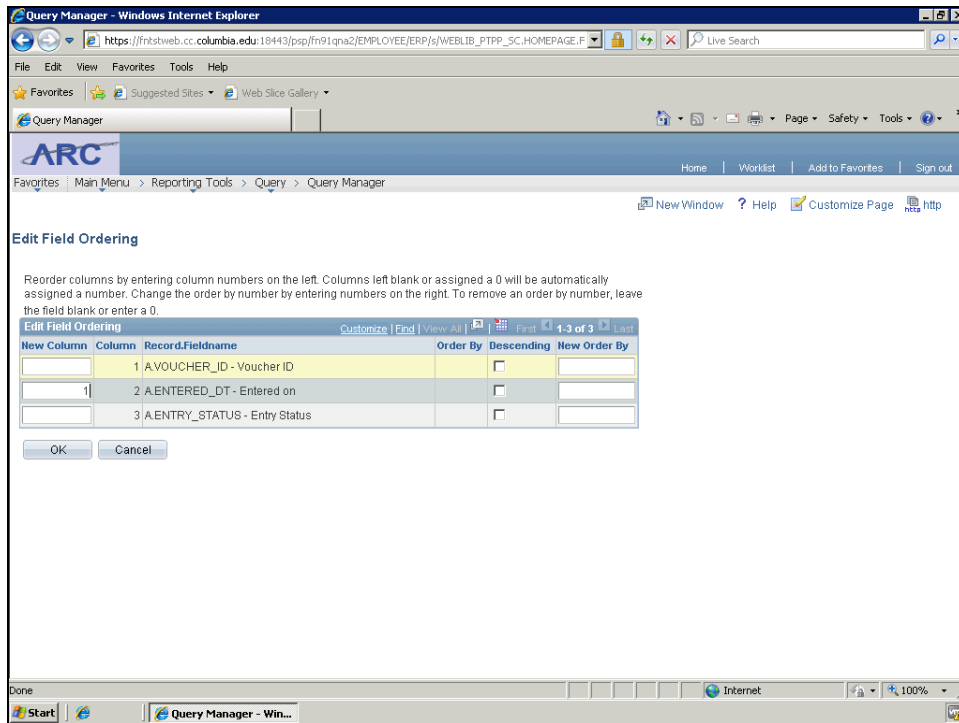
OK Cancel

Training Guide

Advanced ARC Reporting



Step	Action
18.	Enter the desired information into the New Column field. Enter "1".



Step	Action
19.	Click in the New Column field. <input type="text"/>



Training Guide Advanced ARC Reporting

Edit Field Ordering

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

New Column	Column	Record.FieldName	Order By	Descending	New Order By
	1	A.VOUCHER_ID - Voucher ID		<input type="checkbox"/>	
1	2	A. ENTERED_DT - Entered on		<input type="checkbox"/>	
	3	A. ENTRY_STATUS - Entry Status		<input type="checkbox"/>	

OK Cancel

Step	Action
20.	Enter the desired information into the New Column field. Enter "3".

Edit Field Ordering

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

New Column	Column	Record.FieldName	Order By	Descending	New Order By
3	1	A.VOUCHER_ID - Voucher ID		<input type="checkbox"/>	
1	2	A. ENTERED_DT - Entered on		<input type="checkbox"/>	
	3	A. ENTRY_STATUS - Entry Status		<input type="checkbox"/>	

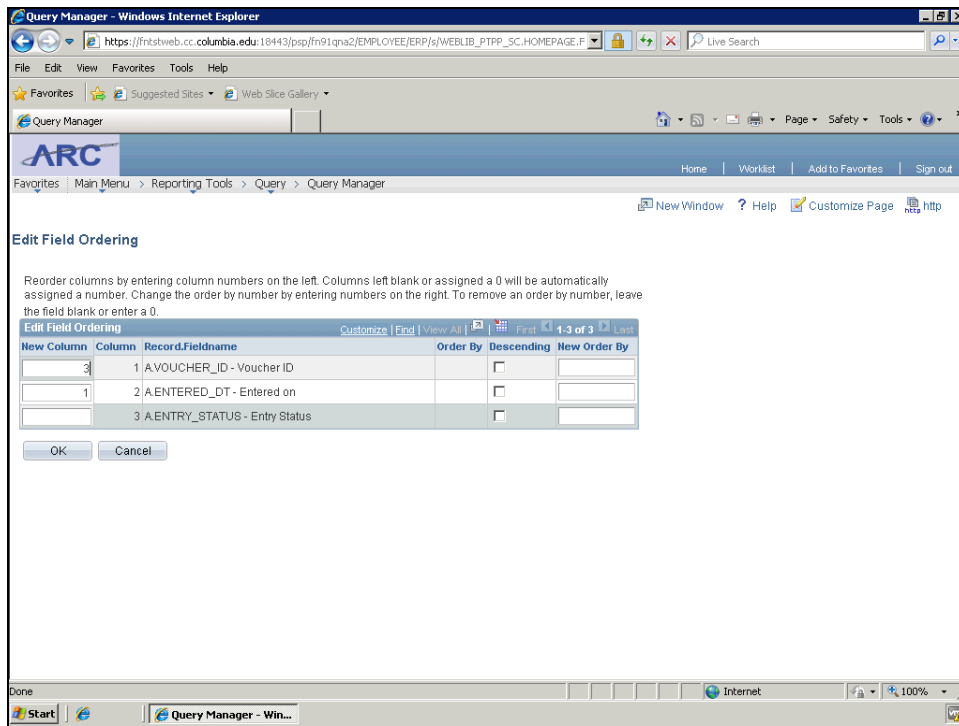
OK Cancel

Training Guide

Advanced ARC Reporting



Step	Action
21.	Click in the New Column field. <input type="text"/>



Step	Action
22.	Enter the desired information into the New Column field. Enter "2".



Training Guide

Advanced ARC Reporting

Query Manager - Windows Internet Explorer

https://frkstweb.cc.columbia.edu:18443/psp/fr91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home | Worklist | Add to Favorites | Sign out

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

New Window ? Help Customize Page http

Edit Field Ordering

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

New Column	Column	Record.FieldName	Order By	Descending	New Order By
3	1	A.VOUCHER_ID - Voucher ID		<input type="checkbox"/>	
1	2	A.ENTERED_DT - Entered on		<input type="checkbox"/>	
2	3	A.ENTRY_STATUS - Entry Status		<input type="checkbox"/>	

OK Cancel

Step	Action
23.	Click in the New Order By field. <div></div>

Query Manager - Windows Internet Explorer

https://frkstweb.cc.columbia.edu:18443/psp/fr91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home | Worklist | Add to Favorites | Sign out

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

New Window ? Help Customize Page http

Edit Field Ordering

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

New Column	Column	Record.FieldName	Order By	Descending	New Order By
3	1	A.VOUCHER_ID - Voucher ID		<input type="checkbox"/>	
1	2	A.ENTERED_DT - Entered on		<input type="checkbox"/>	
2	3	A.ENTRY_STATUS - Entry Status		<input type="checkbox"/>	

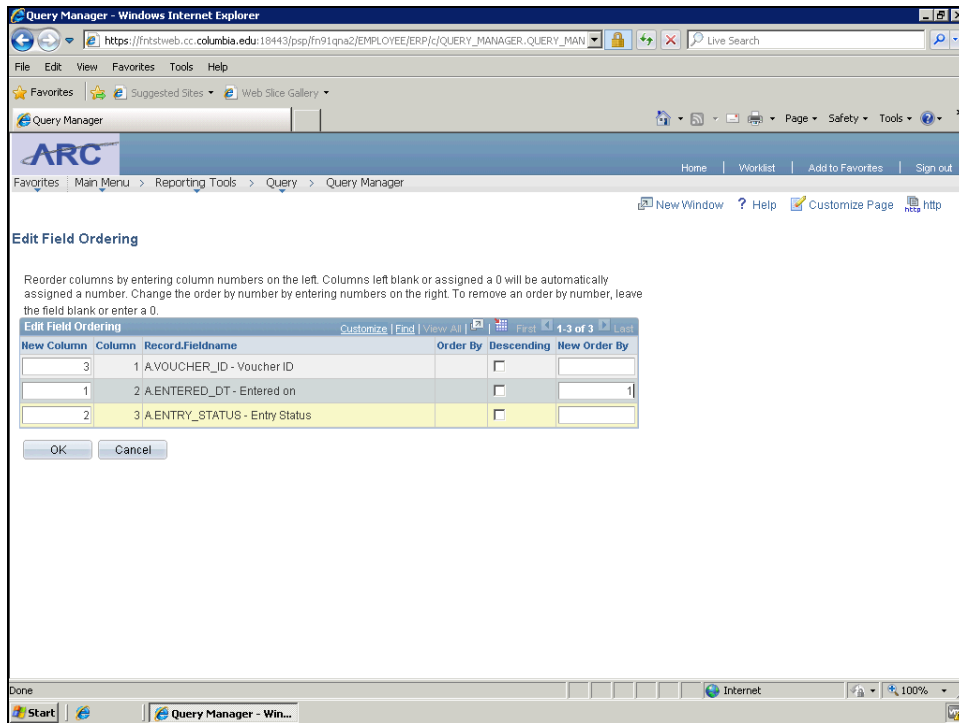
OK Cancel

Training Guide

Advanced ARC Reporting



Step	Action
24.	Enter the desired information into the New Order By field. Enter "1".



Step	Action
25.	Click in the New Order By field. <input type="text"/>



Training Guide

Advanced ARC Reporting

Edit Field Ordering

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

New Column	Column	Record.FieldName	Order By	Descending	New Order By
3	1	A.VOUCHER_ID - Voucher ID		<input type="checkbox"/>	
1	2	A. ENTERED_DT - Entered on		<input type="checkbox"/>	1
2	3	A. ENTRY_STATUS - Entry Status		<input type="checkbox"/>	

OK Cancel

Step	Action
26.	Enter the desired information into the New Order By field. Enter "2".

Edit Field Ordering

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


New Column	Column	Record.FieldName	Order By	Descending	New Order By
3	1	A.VOUCHER_ID - Voucher ID		<input type="checkbox"/>	
1	2	A. ENTERED_DT - Entered on		<input type="checkbox"/>	2
2	3	A. ENTRY_STATUS - Entry Status		<input type="checkbox"/>	

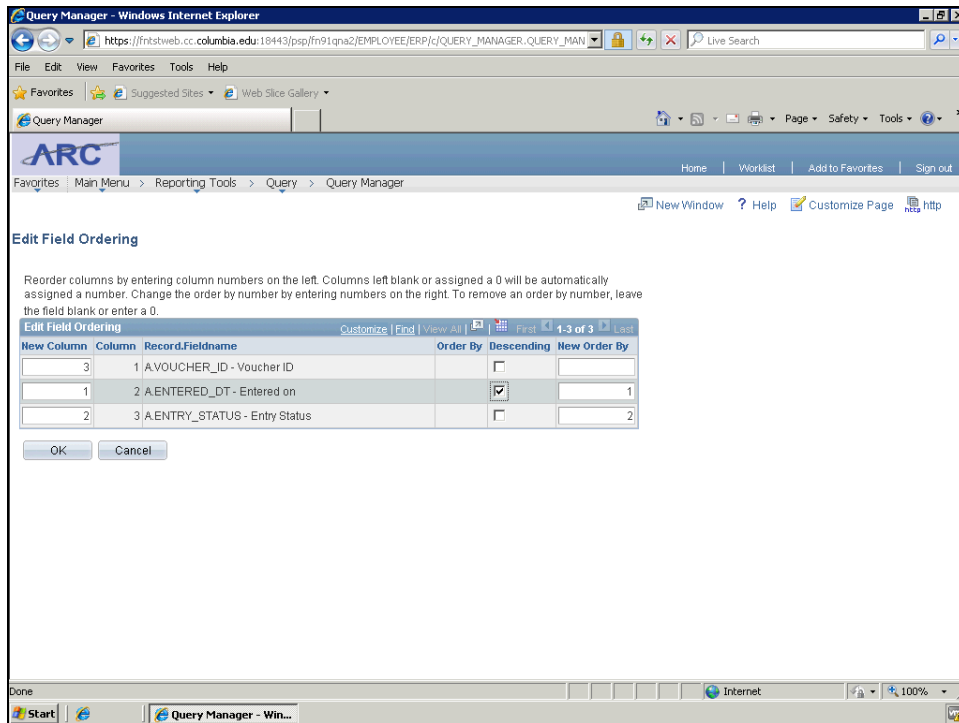
OK Cancel


Training Guide

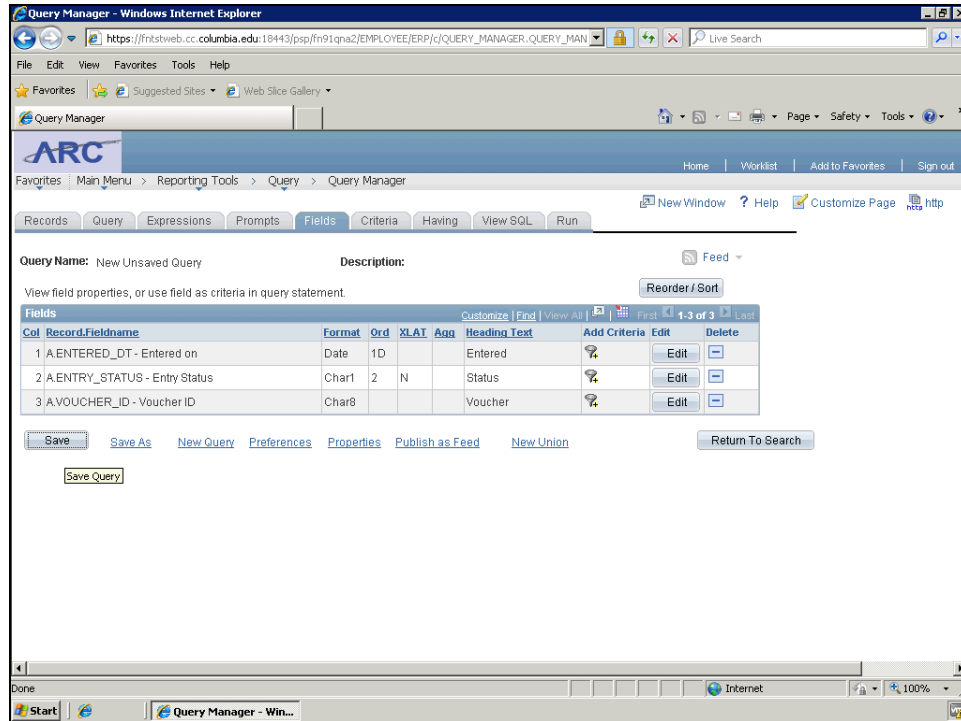
Advanced ARC Reporting



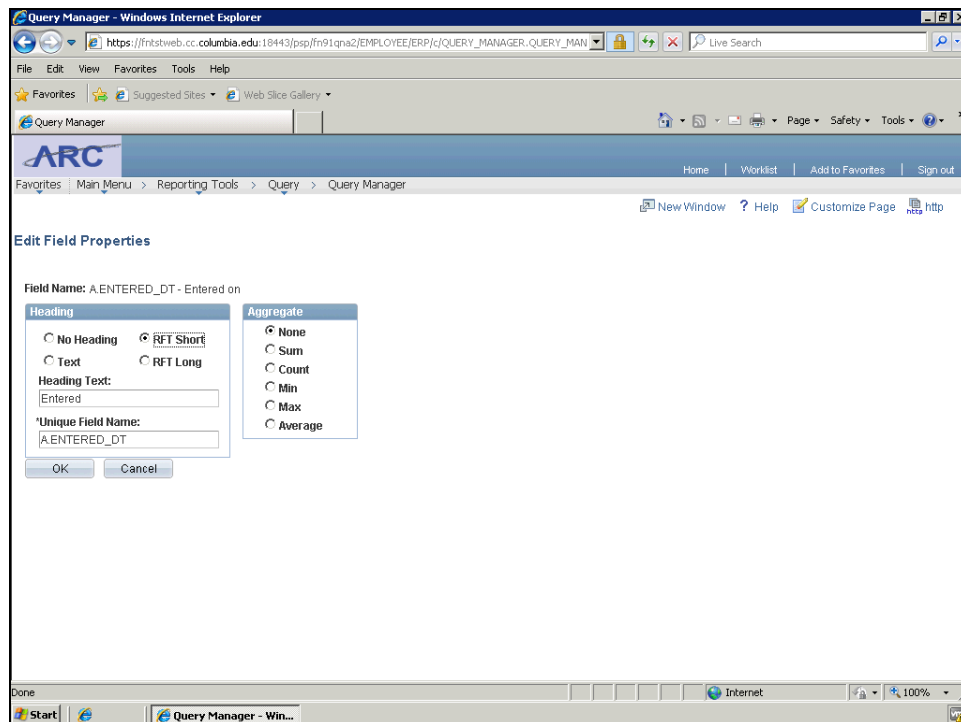
Step	Action
27.	Click the Descending option. 



Step	Action
28.	Click the OK button. 



Step	Action
29.	Click the Edit button.

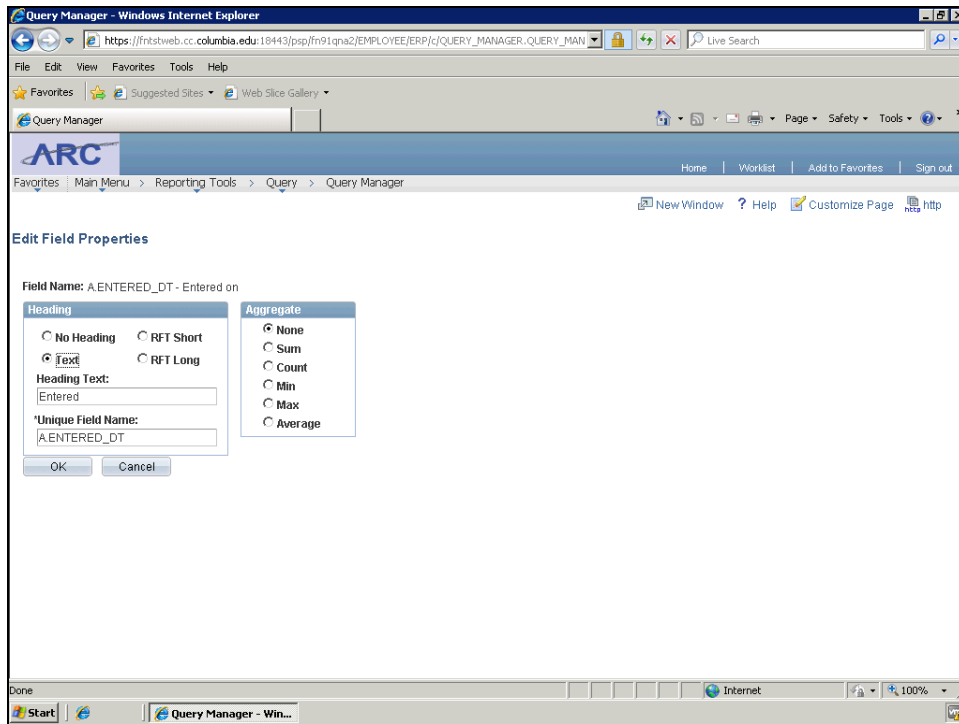


Training Guide

Advanced ARC Reporting



Step	Action
30.	Click the Text option. <div> <input checked="" type="radio"/> Text </div>



Step	Action
31.	Click in the Heading Text field. <div> Entered </div>



Training Guide Advanced ARC Reporting

Query Manager - Windows Internet Explorer

https://frstweb.cc.columbia.edu:18443/psp/fr91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER_QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home | Worklist | Add to Favorites | Sign out

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

New Window ? Help Customize Page http

Edit Field Properties

Field Name: A. ENTERED_DT - Entered on

Heading

☐ No Heading ☐ RFT Short
☒ Text ☐ RFT Long

Heading Text:
Entered

*Unique Field Name:
A. ENTERED_DT

OK Cancel

Aggregate

☒ None
☐ Sum
☐ Count
☐ Min
☐ Max
☐ Average

Done

Start Query Manager - Win...

Step	Action
32.	Enter the desired information into the Heading Text field. Enter " Entered Date ".

Query Manager - Windows Internet Explorer

https://frstweb.cc.columbia.edu:18443/psp/fr91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER_QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home | Worklist | Add to Favorites | Sign out

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

New Window ? Help Customize Page http

Edit Field Properties

Field Name: A. ENTERED_DT - Entered on

Heading

☐ No Heading ☐ RFT Short
☒ Text ☐ RFT Long

Heading Text:
Entered Date

*Unique Field Name:
A. ENTERED_DT

OK Cancel

Aggregate

☒ None
☐ Sum
☐ Count
☐ Min
☐ Max
☐ Average

Done

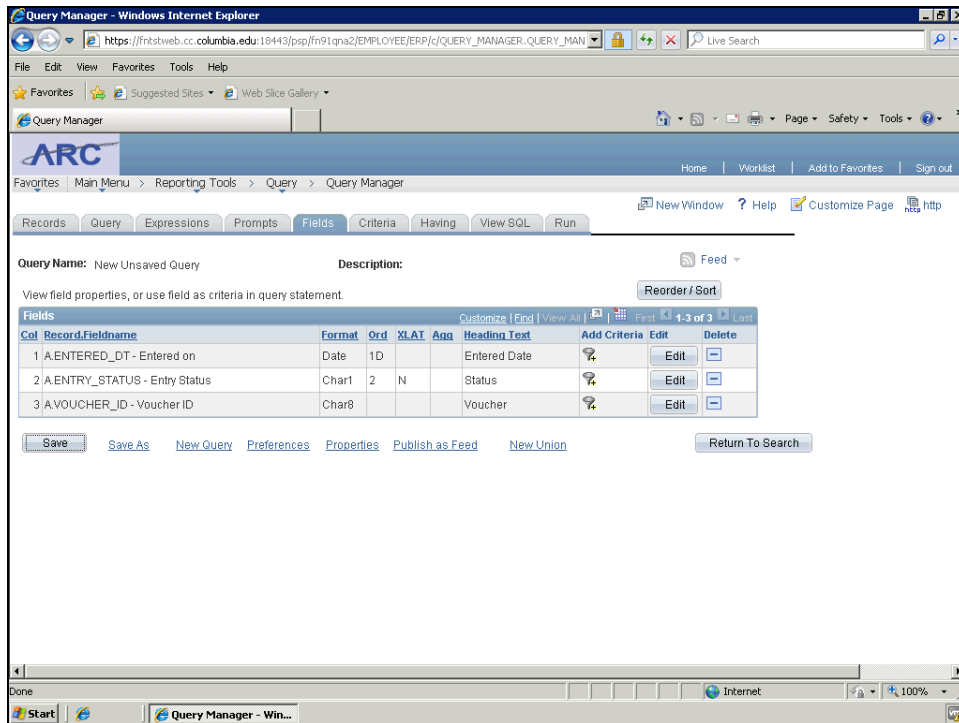
Start Query Manager - Win...

Training Guide

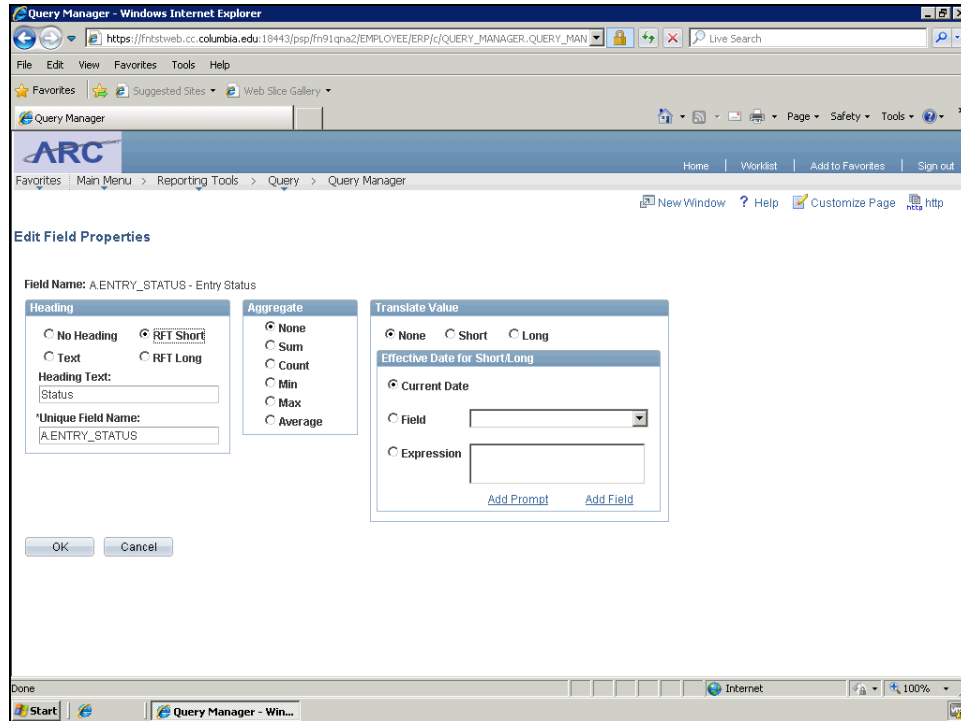
Advanced ARC Reporting



Step	Action
33.	Click the OK button. <div>OK</div>



Step	Action
34.	Click the Edit button. <div>Edit</div>



Query Manager - Windows Internet Explorer

https://frkstweb.cc.columbia.edu:18443/psp/fr91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER_QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home | Worklist | Add to Favorites | Sign out

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

New Window ? Help Customize Page http

Edit Field Properties

Field Name: A.ENTRY_STATUS - Entry Status

Heading

☐ No Heading ☒ RFT Short

☐ Text ☐ RFT Long

Heading Text:

Status

*Unique Field Name:

A.ENTRY_STATUS

Aggregate

☒ None

☐ Sum

☐ Count

☐ Min

☐ Max

☐ Average

Translate Value

☒ None ☐ Short ☐ Long

Effective Date for Short/Long

☒ Current Date

☐ Field

☐ Expression

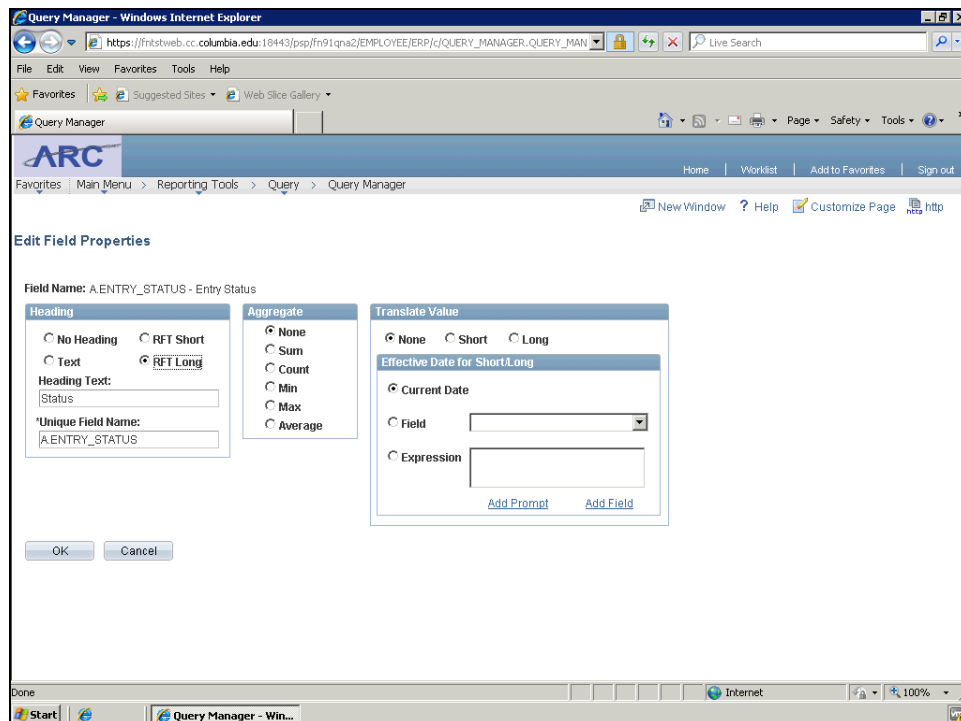
Add Prompt Add Field

OK Cancel

Done

Start Query Manager - Win...

Step	Action
35.	Click the RFT Long option.



Query Manager - Windows Internet Explorer

https://frkstweb.cc.columbia.edu:18443/psp/fr91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER_QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home | Worklist | Add to Favorites | Sign out

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

New Window ? Help Customize Page http

Edit Field Properties

Field Name: A.ENTRY_STATUS - Entry Status

Heading

☐ No Heading ☐ RFT Short

☐ Text ☒ RFT Long

Heading Text:

Status

*Unique Field Name:

A.ENTRY_STATUS

Aggregate

☒ None

☐ Sum

☐ Count

☐ Min

☐ Max

☐ Average

Translate Value

☒ None ☐ Short ☐ Long

Effective Date for Short/Long

☒ Current Date

☐ Field

☐ Expression

Add Prompt Add Field

OK Cancel


Done

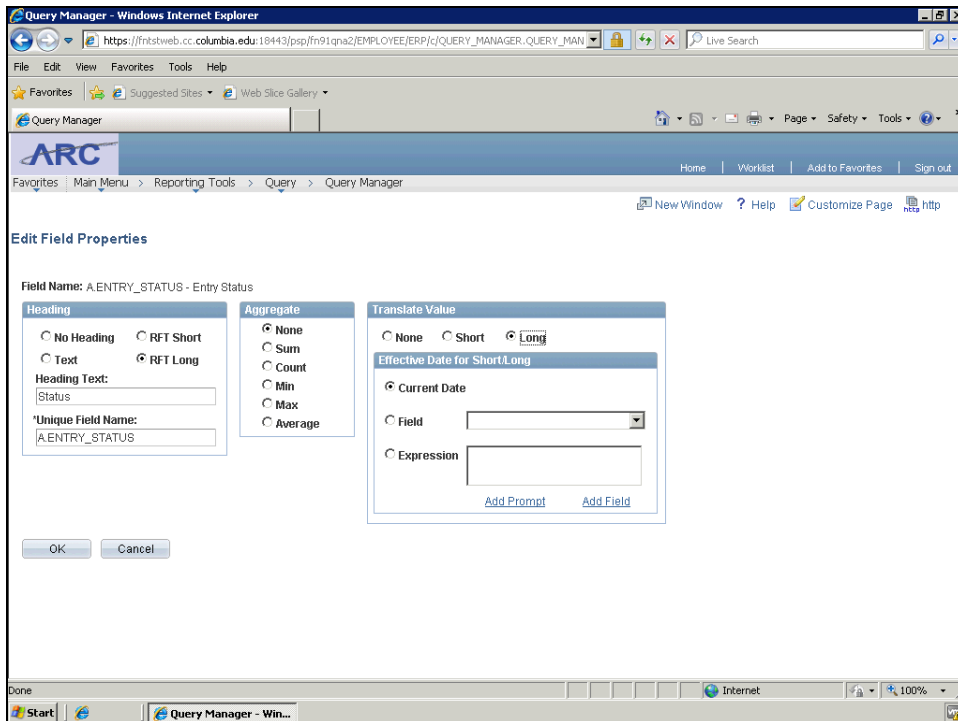
Start Query Manager - Win...

Training Guide

Advanced ARC Reporting



Step	Action
36.	Click the Long option. 



Query Manager - Windows Internet Explorer

https://fnkstweb.cc.columbia.edu:18443/psp/fn91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

Home Worklist Add to Favorites Sign out

Favorites Main Menu Reporting Tools Query Query Manager

New Window Help Customize Page http

Edit Field Properties

Field Name: A.ENTRY_STATUS - Entry Status

Heading

☐ No Heading ☐ RFT Short

☐ Text ☒ RFT Long

Heading Text:

Status

*Unique Field Name:

A.ENTRY_STATUS

Aggregate

☒ None

☐ Sum

☐ Count

☐ Min

☐ Max

☐ Average

Translate Value

☐ None ☐ Short ☒ Long

Effective Date for Short/Long

☒ Current Date

☐ Field


☐ Expression

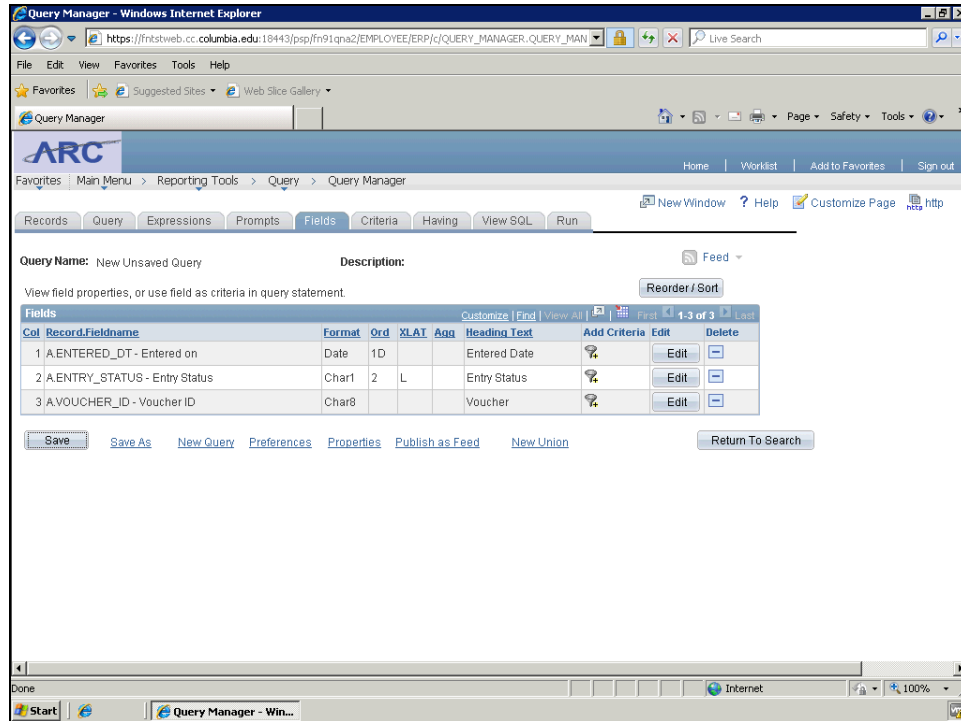
Add Prompt Add Field

OK Cancel

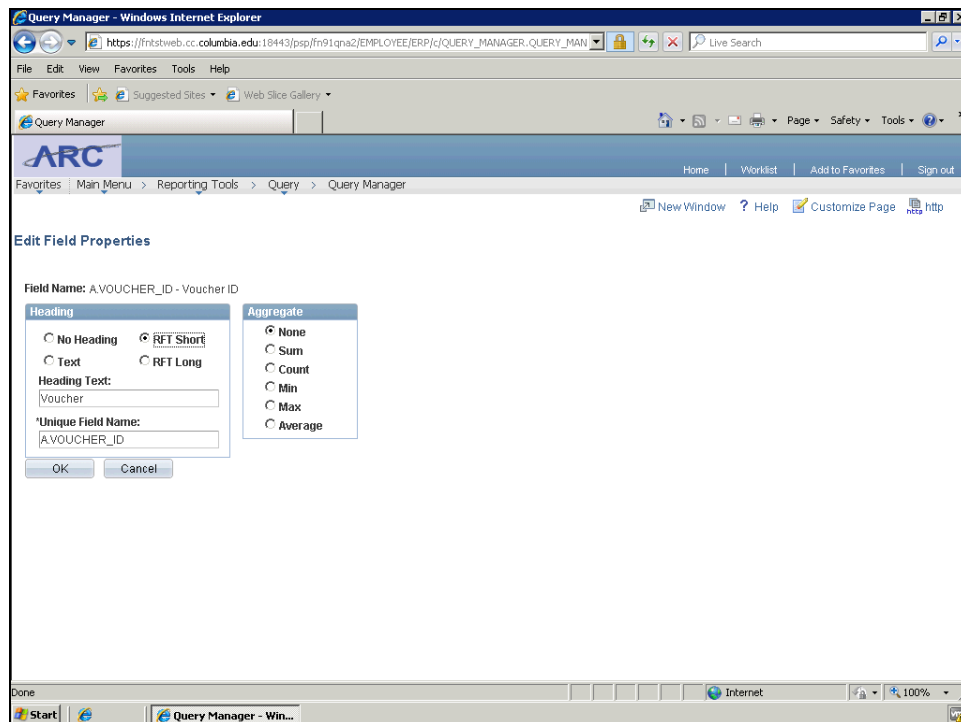
Done

Start Query Manager - Win...

Step	Action
37.	Click the OK button. 




Step	Action
38.	Click the Edit button.

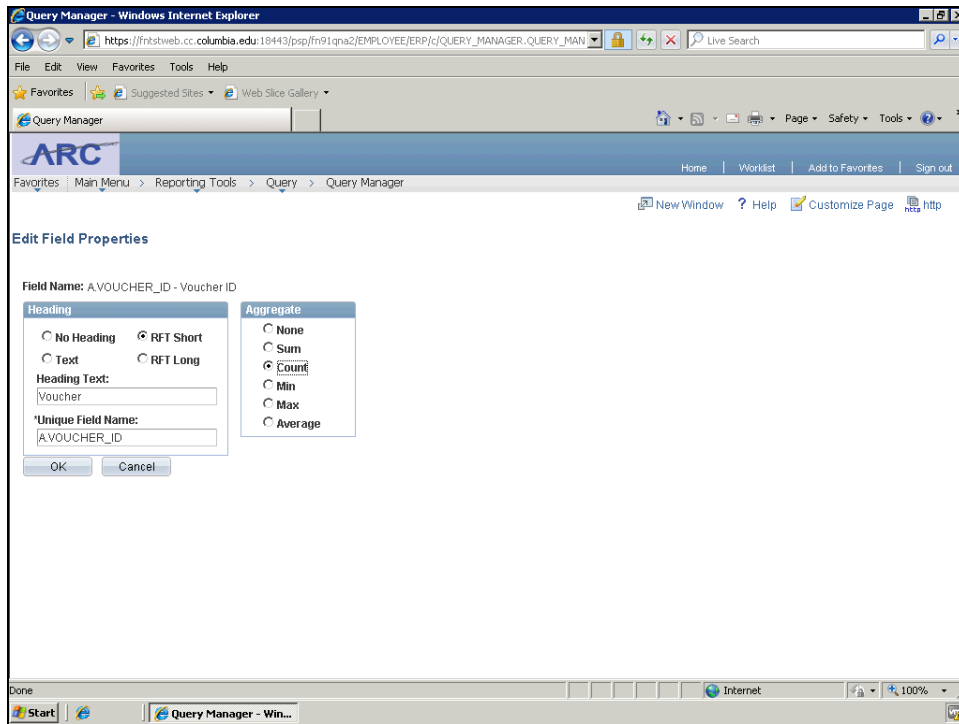


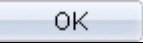
Training Guide

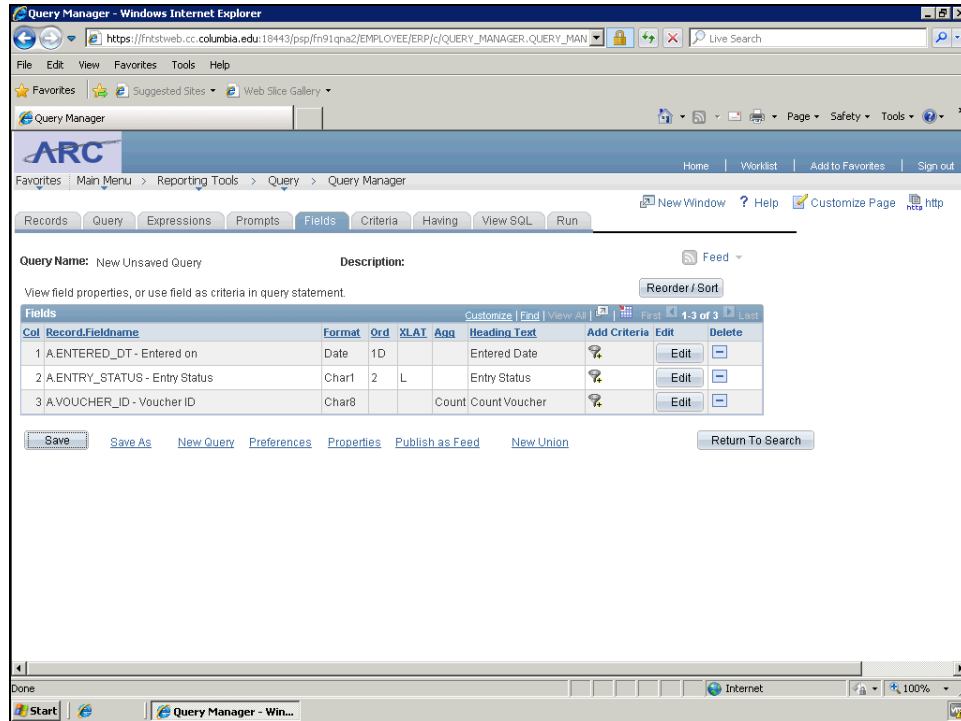
Advanced ARC Reporting



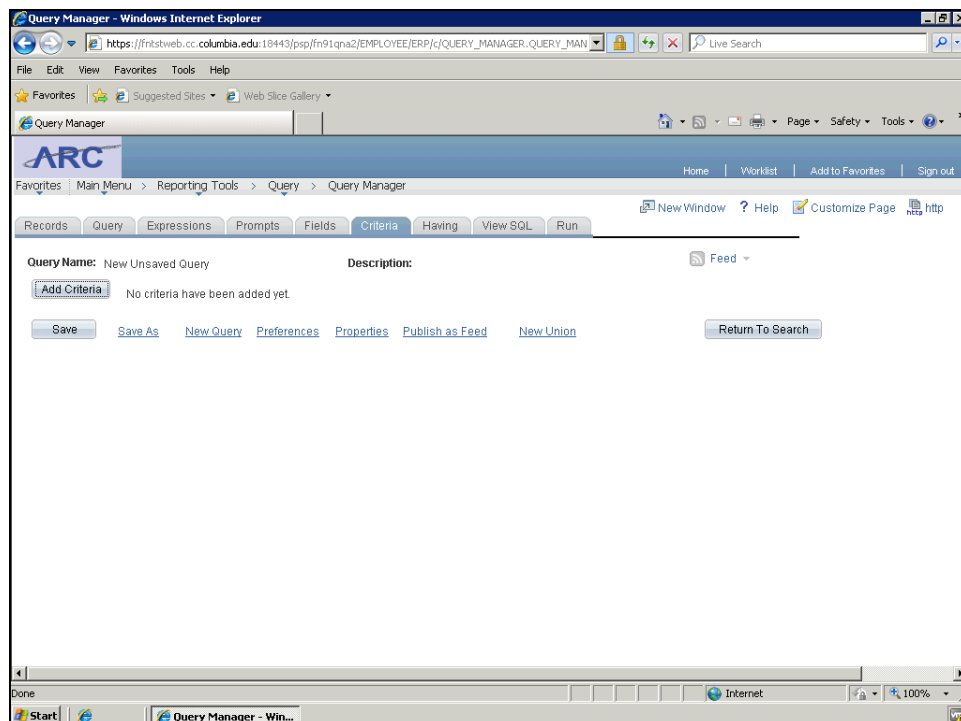
Step	Action
39.	Click the Count option. 



Step	Action
40.	Click the OK button. 




Step	Action
41.	Click the Criteria tab. <div>Criteria</div>

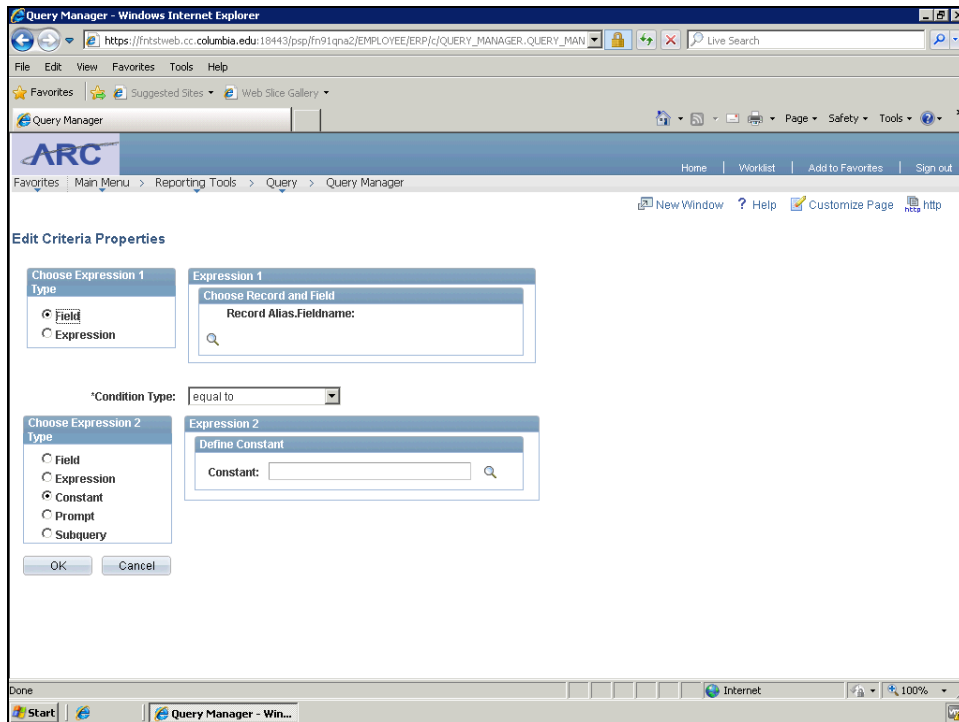


Training Guide

Advanced ARC Reporting



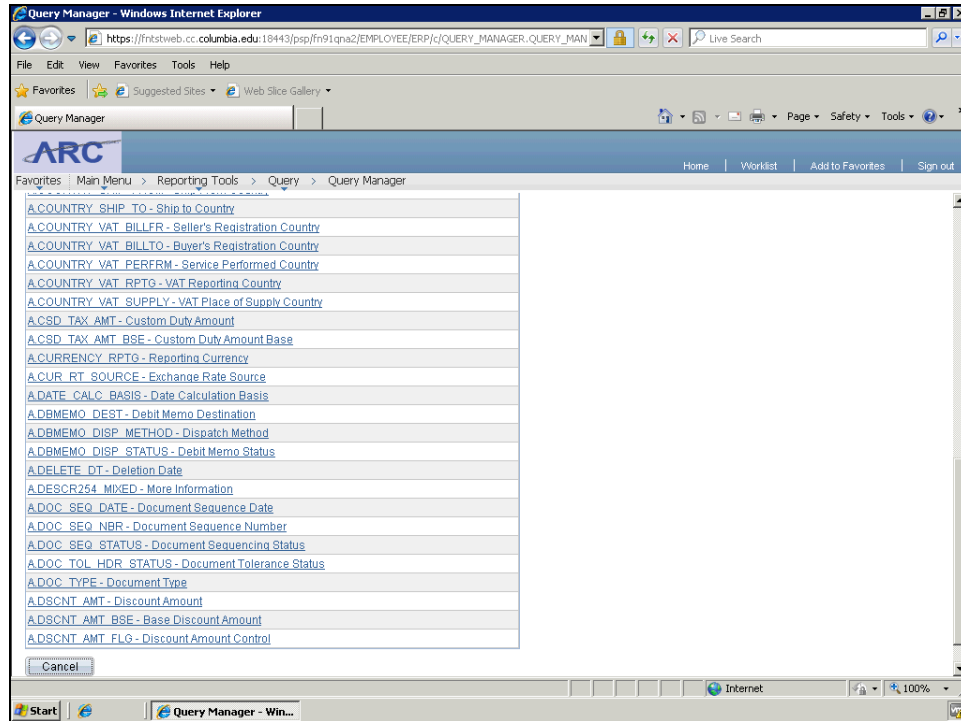
Step	Action
42.	Click the Add Criteria button. 



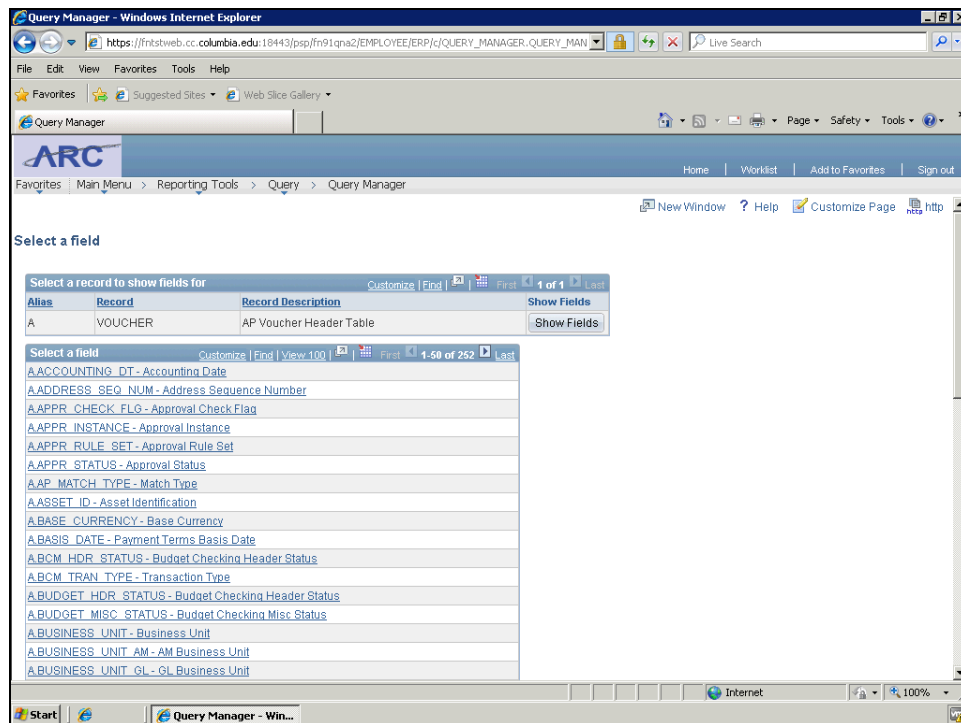
Step	Action
43.	Click the Select Record and Field button. 



Training Guide Advanced ARC Reporting




Step	Action
44.	Click the scrollbar.

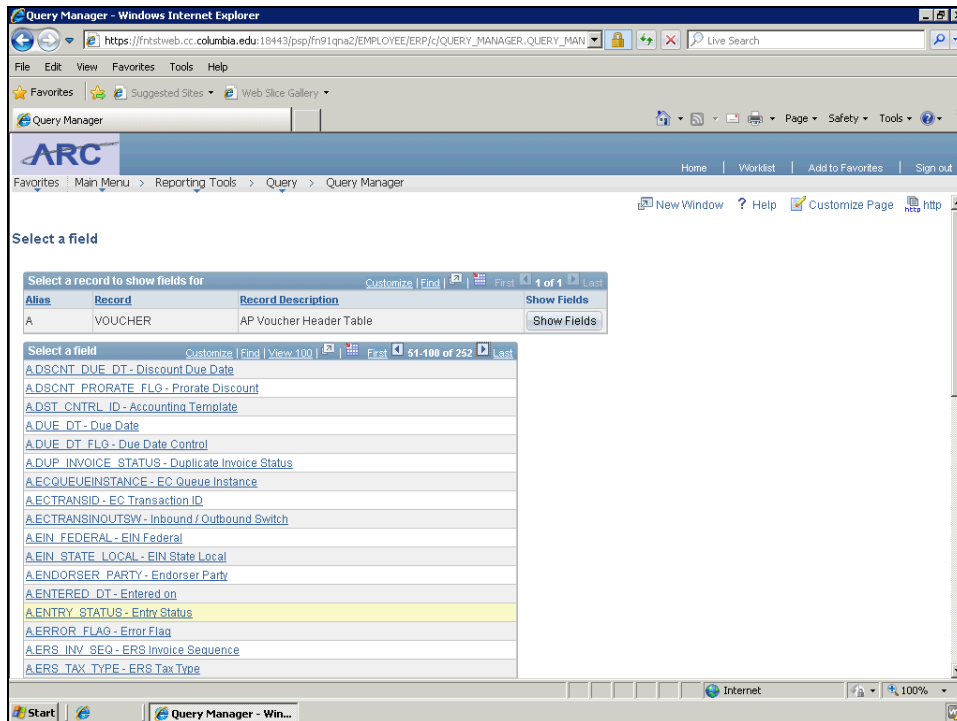


Training Guide

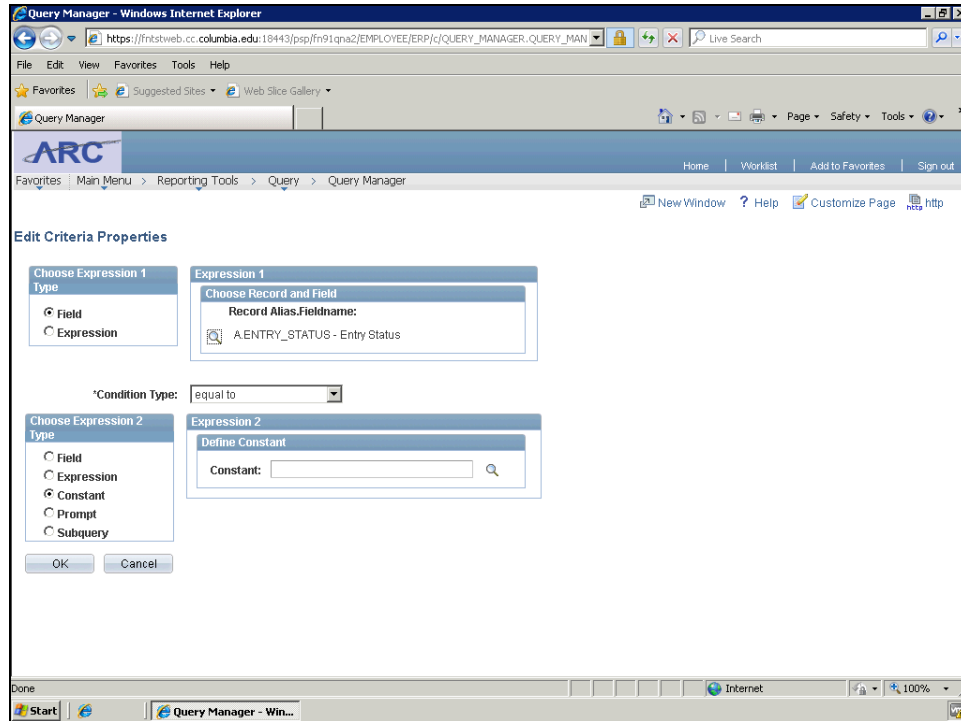
Advanced ARC Reporting



Step	Action
45.	Click the Show next row (Alt+.) button. 

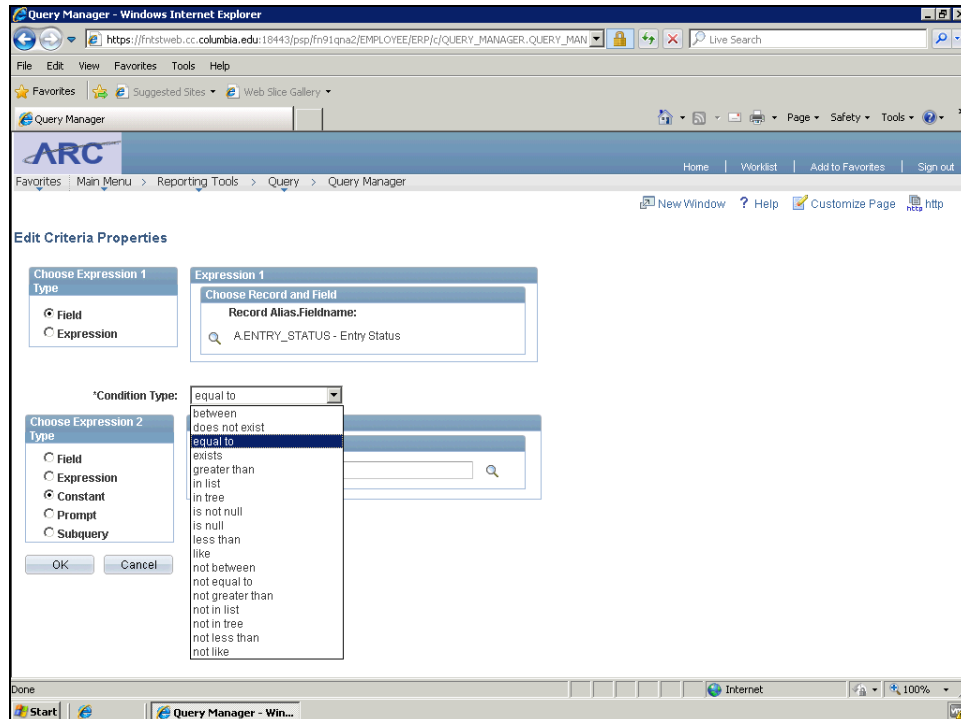


Step	Action
46.	Click the A.ENTRY_STATUS - Entry Status link. 



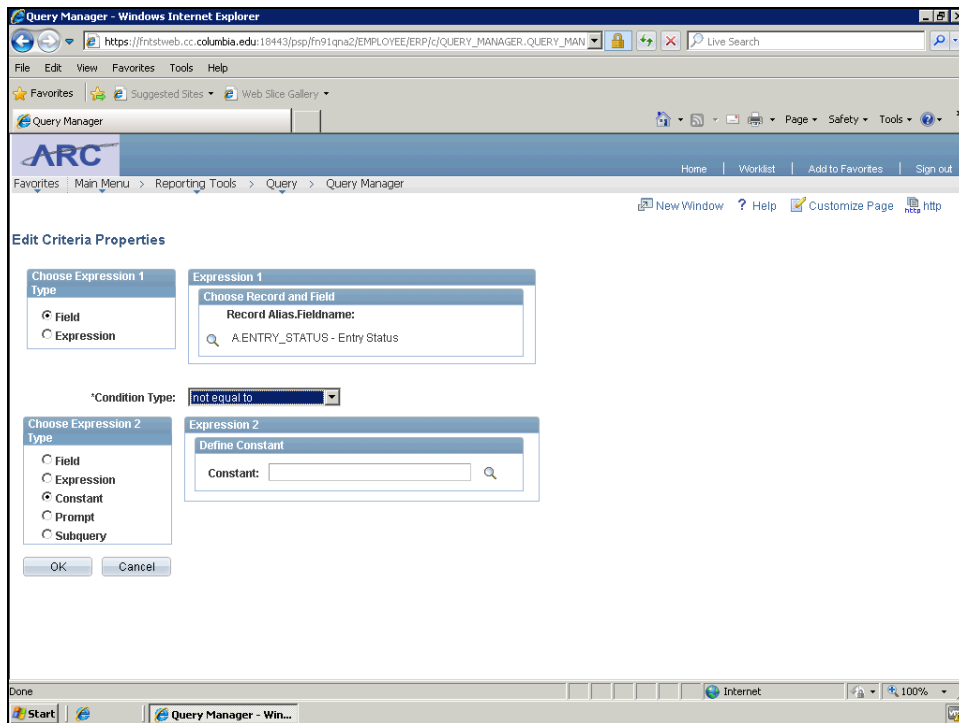
The screenshot shows the 'Edit Criteria Properties' dialog box in the ARC Query Manager. The 'Condition Type' dropdown is set to 'equal to'. The 'Expression 1' section shows 'A.ENTRY_STATUS - Entry Status'. The 'Expression 2' section shows 'Define Constant'.


Step	Action
47.	Click the Condition Type list. <div> <div>equal to</div> </div>



The screenshot shows the 'Edit Criteria Properties' dialog box with the 'Condition Type' dropdown menu open. The menu lists various comparison operators: equal to, between, does not exist, equal to, exists, greater than, in list, in tree, is not null, is null, less than, like, not between, not equal to, not greater than, not in list, not in tree, not less than, and not like. The 'equal to' option is highlighted.

Step	Action
48.	Click the not equal to list item. <div>not equal to</div>



Step	Action
49.	Click the Select Constant From List button. <div></div>



Training Guide Advanced ARC Reporting

Field Value	Translate Long Name	Translate Short Name	Select Constant
D	Through batch defaults	Defaulted	Select Constant
G	Single Payment Error	SinglePay	Select Constant
O	Open	Open	Select Constant
E	Edited by Batch Voucher Module	Edited	Select Constant
L	Reviewed through Maintenance	Reviewed	Select Constant
P	Postable	Postable	Select Constant
X	Deleted	Deleted	Select Constant
C	Complete	Complete	Select Constant
M	Modified	Modified	Select Constant
S	Scheduled for Payment	Scheduled	Select Constant
T	Template Voucher	Template	Select Constant
R	Recycle	Recycle	Select Constant

Step	Action
50.	Click the Select Constant link. Select Constant

Choose Expression 1 Type

☒ Field

☐ Expression

Expression 1

Choose Record and Field

Record Alias.FieldName:

AENTRY_STATUS - Entry Status

*Condition Type: not equal to

Choose Expression 2 Type

☐ Field

☐ Expression

☒ Constant

☐ Prompt

☐ Subquery

Expression 2


Define Constant

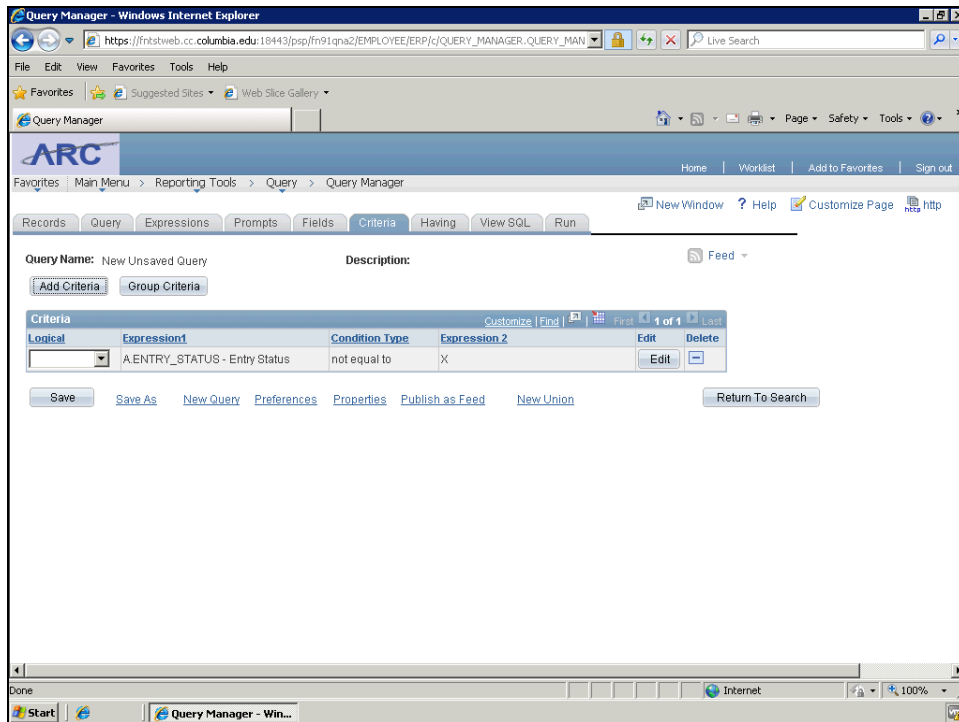
Constant: X


Training Guide

Advanced ARC Reporting



Step	Action
51.	Click the OK button. 



Step	Action
52.	Click the View SQL tab. 



Training Guide Advanced ARC Reporting

Query Manager - Windows Internet Explorer

https://frstweb.cc.columbia.edu:18443/psp/fr91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home | Worklist | Add to Favorites | Sign out

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

Records Query Expressions Prompts Fields Criteria Having View SQL Run

New Window ? Help Customize Page http

Query Name: New Unsavd Query Description:

Feed


Query SQL:

```
SELECT TO_CHAR(A.ENTRY_STATUS, COUNT(*), TO_CHAR(SYSDATE, 'YYYY-MM-DD'))
FROM PS_VOUCHER A
WHERE A.ENTRY_STATUS <> 'X'
GROUP BY TO_CHAR(A.ENTRY_STATUS, COUNT(*), TO_CHAR(SYSDATE, 'YYYY-MM-DD'))
ORDER BY 1 DESC, 2
```

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

Done

Start Query Manager - Win...

Step	Action
53.	Click the Save As link. 

Query Manager - Windows Internet Explorer

https://frstweb.cc.columbia.edu:18443/psp/fr91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home | Worklist | Add to Favorites | Sign out

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

New Window ? Help Customize Page http

Enter a name to save this query as:

*Query:

Description:

Folder:

*Query Type: User

*Owner: Private

Query Definition:

OK Cancel

Done

Start Query Manager - Win...

Training Guide

Advanced ARC Reporting



Step	Action
54.	Enter the desired information into the Query field. Enter " CU_AP_VOUCHER_COUNT_TRAINING ".

A screenshot of a web browser window titled "Query Manager - Windows Internet Explorer". The address bar shows a URL from "https://fntstweb.cc.columbia.edu". The page has a blue header with the "ARC" logo and navigation links like "Home", "Worklist", "Add to Favorites", and "Sign out". Below the header, there's a breadcrumb trail: "Favorites | Main Menu > Reporting Tools > Query > Query Manager". The main content area is titled "Enter a name to save this query as:". It contains several input fields: "Query:" with the text "CU_AP_VOUCHER_COUNT_TRAINING", "Description:" (empty), "Folder:" (empty), "Query Type:" with a dropdown menu set to "User", and "Owner:" with a dropdown menu set to "Private". Below these is a larger "Query Definition:" text area. At the bottom of the form are "OK" and "Cancel" buttons. The browser's status bar at the bottom shows "Done" and "Internet" with a 100% zoom level.

Step	Action
55.	Click in the Description field. <input type="text"/>



Training Guide Advanced ARC Reporting

Query Manager - Windows Internet Explorer

https://frstweb.cc.columbia.edu:18443/psp/fr91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home | Worklist | Add to Favorites | Sign out

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

New Window ? Help Customize Page http

Enter a name to save this query as:

*Query: CU_AP_VOUCHER_COUNT_TRAINING

Description:

Folder:

*Query Type: User

*Owner: Private

Query Definition:

OK Cancel

Done

Start Query Manager - Win...

Step	Action
56.	Enter the desired information into the Description field. Enter " Count of Vouchers ".

Query Manager - Windows Internet Explorer

https://frstweb.cc.columbia.edu:18443/psp/fr91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home | Worklist | Add to Favorites | Sign out

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

New Window ? Help Customize Page http

Enter a name to save this query as:

*Query: CU_AP_VOUCHER_COUNT_TRAINING

Description: Count of Vouchers

Folder:

*Query Type: User

*Owner: Private

Query Definition:

OK Cancel

Done

Start Query Manager - Win...

Training Guide

Advanced ARC Reporting



Step	Action
57.	Click the Owner list. <div>Private</div>

Query Manager - Windows Internet Explorer

https://fnkstweb.cc.columbia.edu:18443/psp/m91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER_QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

Home | Worklist | Add to Favorites | Sign out

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

Enter a name to save this query as:

*Query: CU_AP_VOUCHER_COUNT_TRAINING

Description: Count of Vouchers

Folder:

*Query Type: User

*Owner: Private

Query Definition: Public

OK Cancel

Step	Action
58.	Click the Public list item. <div>Public</div>



Training Guide Advanced ARC Reporting

Query Manager - Windows Internet Explorer

https://frkstweb.cc.columbia.edu:18443/psp/fr91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

Home Worklist Add to Favorites Sign out

Favorites Main Menu Reporting Tools Query Query Manager

New Window Help Customize Page http

Enter a name to save this query as:

*Query: CU_AP_VOUCHER_COUNT_TRAINING

Description: Count of Vouchers


Folder:

*Query Type: User

*Owner: Public

Query Definition:

OK Cancel

Step	Action
59.	Click the OK button. 

Query Manager - Windows Internet Explorer

https://frkstweb.cc.columbia.edu:18443/psp/fr91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

Home Worklist Add to Favorites Sign out

Favorites Main Menu Reporting Tools Query Query Manager

New Window Help Customize Page Saved

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Query Name: CU_AP_VOUCHER_COUNT_TRAINING Description: Count of Vouchers Feed

Query SQL:


```
SELECT TO_CHAR(A.ENTRY_DT, 'YYYY-MM-DD'), A.ENTRY_STATUS, COUNT(*)  
FROM PS_VOUCHER A  
WHERE A.ENTRY_STATUS <> 'X'  
GROUP BY TO_CHAR(A.ENTRY_DT, 'YYYY-MM-DD'), A.ENTRY_STATUS  
ORDER BY 1 DESC, 2
```

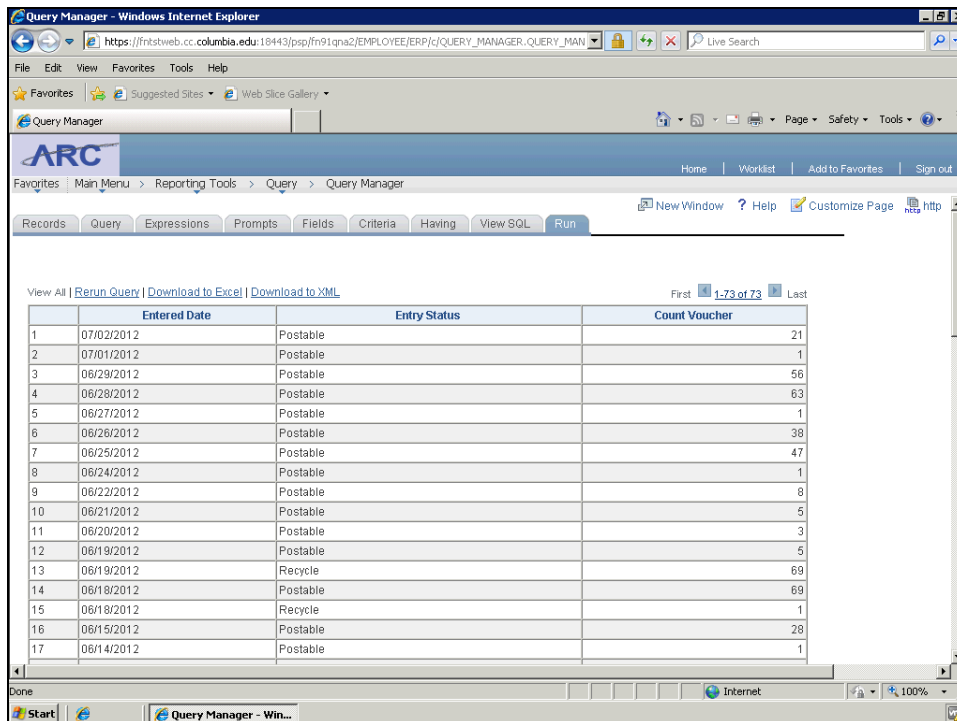
Save Save As New Query Preferences Properties Publish as Feed New Union Return To Search

Training Guide

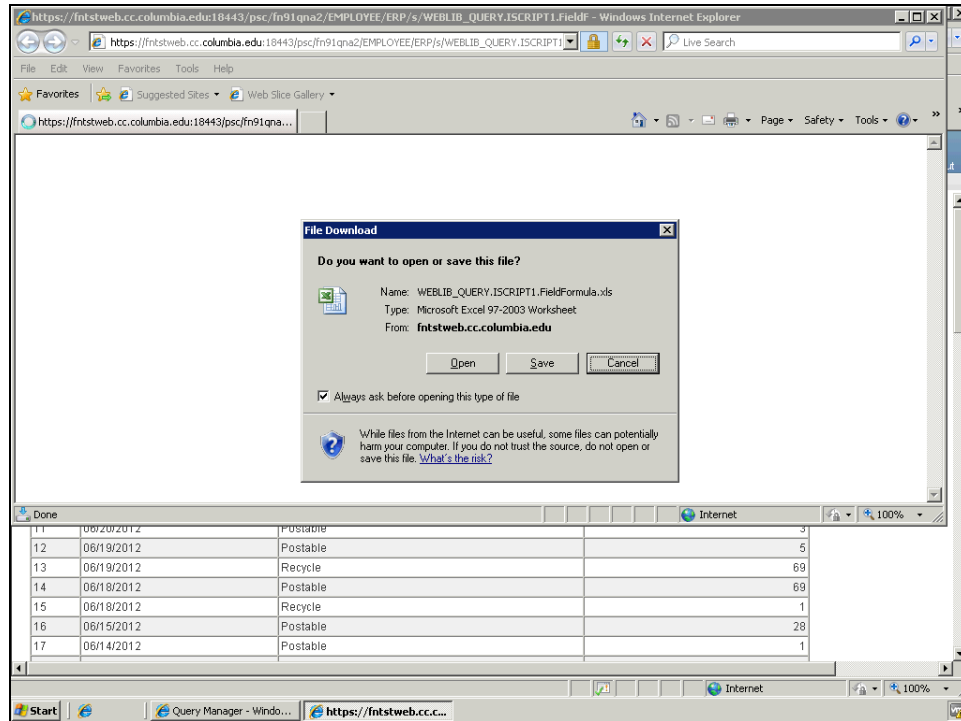
Advanced ARC Reporting



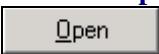
Step	Action
60.	Click the Run tab. 

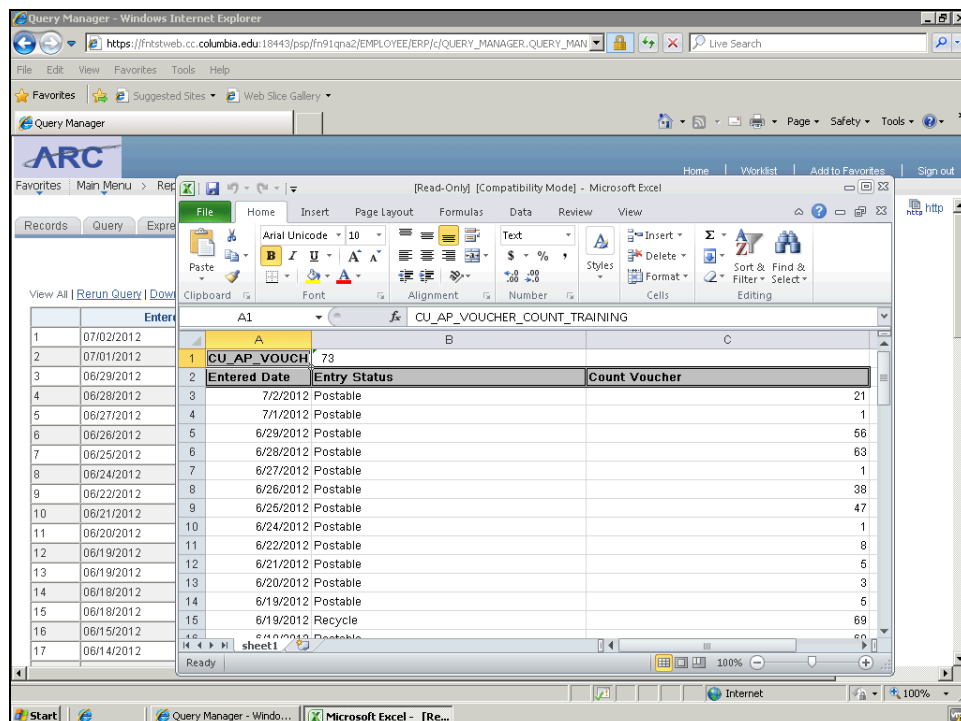


Step	Action
61.	Click the Download to Excel link. Download to Excel



Step	Action
62.	Click the Open button.




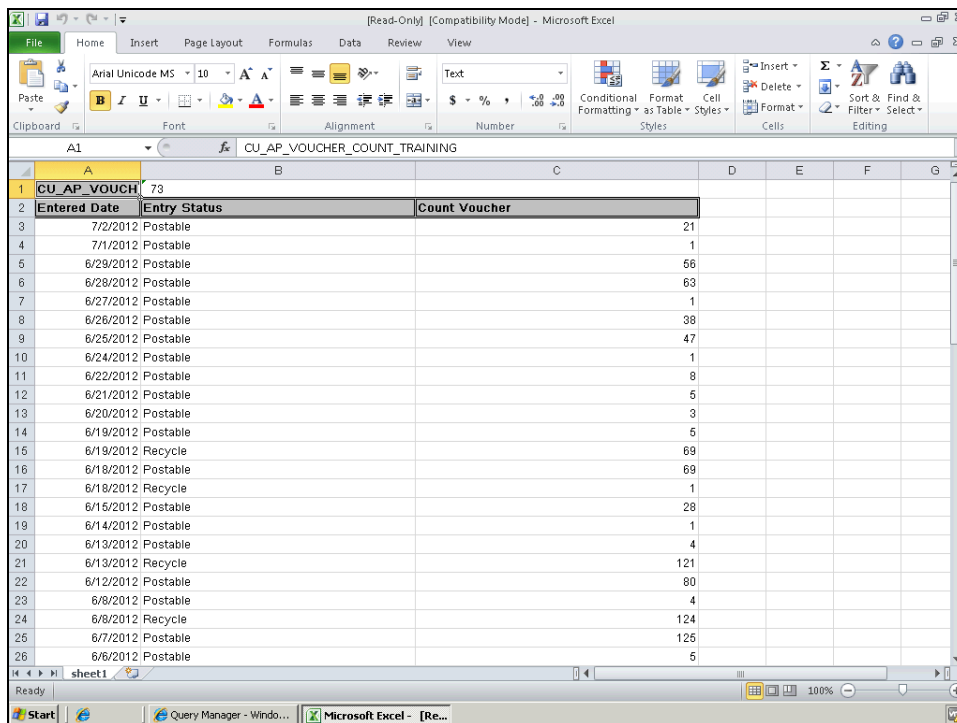


Training Guide

Advanced ARC Reporting



Step	Action
63.	Click the Maximize button. 



The screenshot shows a Microsoft Excel spreadsheet titled "CU_AP_VOUCHER_COUNT_TRAINING". The spreadsheet contains a table with the following data:

Entered Date	Entry Status	Count Voucher
7/2/2012	Postable	21
7/1/2012	Postable	1
6/28/2012	Postable	56
6/28/2012	Postable	63
6/27/2012	Postable	1
6/26/2012	Postable	38
6/25/2012	Postable	47
6/24/2012	Postable	1
6/22/2012	Postable	8
6/21/2012	Postable	5
6/20/2012	Postable	3
6/19/2012	Postable	5
6/19/2012	Recycle	69
6/18/2012	Postable	69
6/18/2012	Recycle	1
6/16/2012	Postable	28
6/14/2012	Postable	1
6/13/2012	Postable	4
6/13/2012	Recycle	121
6/12/2012	Postable	80
6/8/2012	Postable	4
6/8/2012	Recycle	124
6/7/2012	Postable	125
6/6/2012	Postable	5

Step	Action
64.	You have successfully created a basic query in ARC and downloaded the results to excel. End of Procedure.



Instructions - Creating a Query

Creating a Query Instructions:

1. **Click** the **Create New Query** link to create a new query.

- The Query page with all its tabs will appear

2. **Type** a specific name in the **'begins with'** text box and then **click** the **Search** button to display a list of records that match your search criteria.

- If you do not know the name of the record, leave the field blank and click the Search button. This will display a list of up to 300 records. You can also perform a partial search by entering part of a record name or description in the 'Search By' field.

Note: Enter a partial description followed by the wildcard symbol (%) to bring up all matching entries that include that description.

3. To select a specific record from the search results list, **click** the **Add Record** link, corresponding to that Record.

- An effective date criteria is added whenever an effective-dated table is selected and a dialog box is displayed indicating it.
- The following Query page appears, listing the fields associated with that record.

4. **Select** the **checkboxes** for the fields to be included in the Query.

Note: The options under the Expressions and Prompts tabs are considered advanced options and will be discussed in the *Advanced Query Components* lesson of this course.

5. **Click** the **Fields** tab.

- The Fields tab is used for viewing or modifying fields for the selected output.

6. **Click** the **Reorder/Sort** button to change the Column and Sort Order for multiple fields.

- The "Edit Field Ordering" page lets you reorder columns by entering column numbers on the left.

7. **Enter a number** in the **New Column** text box next to the field to be repositioned.

8. **Click** the **OK** button.

- The selected field is repositioned.

9. **Click** the **Edit** button to the right of the desired field to edit field properties

- The Heading Text field properties can be used to display a more user friendly name for the selected field.

10. **Click** the **Text** radio button and then enter an appropriate heading text description on the '**Heading Text**' textbox.

- The Edit Field Properties page is used to specify column heading properties for the selected field.

11. **Click** the **OK** button.

Criteria can be specified for a field by using the Add Criteria icon next to the required field. Additionally, you can specify criteria by selecting the Criteria tab

12. **Click** the **Add Criteria** icon for the field for which a criteria will be specified for.

- When you access the Edit Criteria Properties page by clicking the 'Add Criteria' icon on the Fields page Query Manager displays the Edit Criteria Properties page with the selected field populated in the Expression 1 field.

Condition Types:

The condition type determines how Query Manager compares the values of the first expression (Expression 1) to the second expression (Expression 2).

For more information about expression type and condition type click [here](#).

13. **Enter** criteria properties for the selected field and then **click OK**.

14. **Click** the **Criteria** tab.

15. **Click** the **Add Criteria** button to specify selection criteria.

16. **Click** the **Select Record and Field** lookup icon.

17. **Select** the field to specify criteria for.

- The procedure for Choose Expressions differs depending on what kind of value you are entering. If you are comparing one field to another, select the second record fields; if you are comparing the rows to a constant value enter the Constant.

18. **Type** specific criteria in the **Constant** text box and then click **OK**.

- Using PeopleSoft Query, you can relate multiple criteria in specific ways that you define using the AND, AND NOT, OR, and OR NOT operators. You can also group criteria using parentheses.

Note: 'AND NOT' and 'OR NOT' Logical operators are combined with Condition Type operators to give users more choices while establishing criteria.



19. **Click** the **Add Criteria** button again to specify criteria for a specific field.
20. **Click** the **Select Record and Field** lookup icon.
21. **Select** a field to specify criteria for.
22. **Type** a specific criteria in the **Constant** text box and then click **OK** to specify a condition using the 'OR' operator.
23. **Click** the Logical drop down box next to the Field to use to be used with an 'OR' logical operator and select **'OR'**.

Note: You can use a field from a record as criteria even if you do not choose that field for Query output.

24. **Click** the **Query** tab.
25. **Uncheck** the **selection box** for the field to be hidden.
 - The criteria can be seen on the View SQL tab.

26. **Click** on the **View SQL** tab to see the criteria.

Note: When your query includes multiple criteria, PeopleSoft Query evaluates criteria linked by ANDs before those linked by ORs.

27. **Click** the **Criteria** tab and then **click** the **Group Criteria** button.
28. Use **parenthesis** to group the OR condition and then **click OK**.
29. **Click** the **Run** tab.

Note: Prompts are used to refine a query when you run it. When you run a query with a prompt, a prompt page requests the required value. After entering the value into the field, the query uses it as the comparison value. More than one prompt can be used.



Instructions - Saving a Query

1. Once you've created a new query, **click** the **View SQL** tab.

- You can view the SQL for the Query created using the View SQL tab. You cannot modify SQL on this page, but can use it to review the query prior to running it in order to identify errors.

Note: Save queries that are expected to be used on a repeated basis and to ensure development efforts are recorded. Save queries by clicking either the **Save** button or the **Save As** link from any Query Manager page except from the Run page.

Use a naming convention to make it easier to find the query at a later time.

Query naming convention:

2. **Click** the **Save** button at the bottom of the page.
3. **Enter** field information and then **click OK**.



Instructions - Running a Query

Navigation: Reporting Tools > Query > Query Manager

1. **Enter** query name or part of it in the **'begins with'** text box



Advanced Query Components

This is the *Advanced Query Components* lesson of the *Advanced ARC Reporting* course. Upon completion of this lesson, you will be able to:

- Understand how advanced query options are used in query building

Estimated Time to Complete Lesson: 15 minutes

Joins

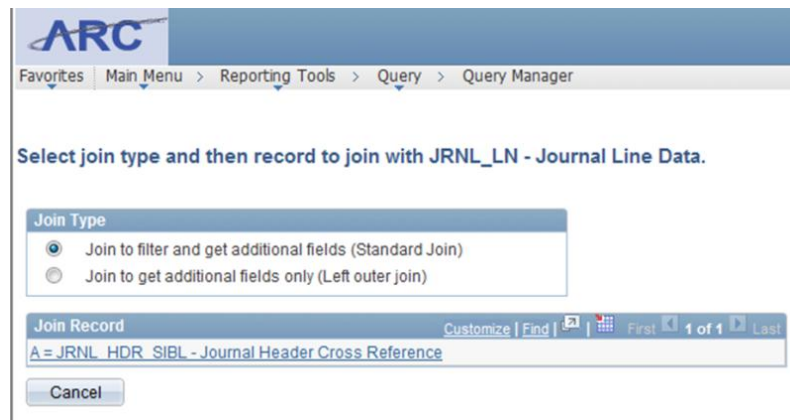
Joins allow users to retrieve data from multiple records and present the data as one table. The tables are linked based on common fields. There are primarily two types of joins used in the Query: Related Joins and Hierarchical Joins. Other joins can be made in the Criteria tab by specifying the criteria in the query.

Related Joins

Related Joins are those where records are related by common fields. For instance, you may have an employee table listing all employees and an FSA (Flexible Spending Account) table listing employees participating in the program. You can join the tables using the Employee ID common field.

Hierarchical Joins

Hierarchical joins use records that have a parent-child relationship. A record hierarchy join is used to join a parent table to a child table.



ARC

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

Select join type and then record to join with JRNL_LN - Journal Line Data.

Join Type

- ☒ Join to filter and get additional fields (Standard Join)
- ☐ Join to get additional fields only (Left outer join)

Join Record Customize | Find | First 1 of 1 Last

A = JRNL_HDR_SIBL - Journal Header Cross Reference

Cancel

Auto Join Criteria

Query has detected the join conditions shown below.
Use the checkboxes to unselect the criteria that you do not want to add to the query and click add criteria when done. The criteria added can always be modified later using the criteria tab.

<input checked="" type="checkbox"/>	A.BUSINESS_UNIT - Business Unit = B.BUSINESS_UNIT - Business Unit
<input checked="" type="checkbox"/>	A.JOURNAL_ID - Journal ID = B.JOURNAL_ID - Journal ID
<input checked="" type="checkbox"/>	A.JOURNAL_DATE - Journal Date = B.JOURNAL_DATE - Journal Date
<input checked="" type="checkbox"/>	A.UNPOST_SEQ - UnPost Sequence = B.UNPOST_SEQ - UnPost Sequence

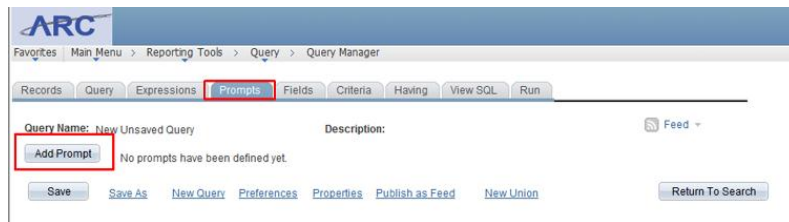
Add Criteria

Cancel

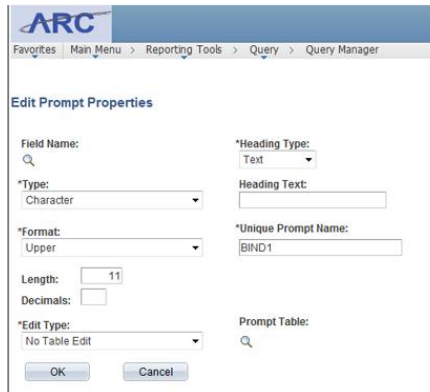
Prompts

Prompts allow the user to enter in run time controls. This is useful if you plan on reusing the query and would like to run it for different transaction ids, transaction types, dates, etc.

The Prompts tab allows you to create and edit input criteria for your query. Run-Time prompts allow you to enter a value to satisfy the criterion for a specific field at the time that the query is run. The query results will include only those rows of information that match the value entered in the prompt.



The screenshot shows the ARC Query Manager interface. The 'Prompts' tab is selected, and the 'Add Prompt' button is highlighted with a red box. The interface includes a navigation bar with 'Records', 'Query', 'Expressions', 'Prompts', 'Fields', 'Criteria', 'Having', 'View SQL', and 'Run'. Below the navigation bar, the 'Query Name' is 'New Unsavd Query' and the 'Description' is empty. The 'Add Prompt' button is located below the 'Query Name' field. The text 'No prompts have been defined yet.' is displayed. At the bottom, there are buttons for 'Save', 'Save As', 'New Query', 'Preferences', 'Properties', 'Publish as Feed', 'New Union', and 'Return To Search'.



The screenshot shows the 'Edit Prompt Properties' dialog box. It contains the following fields and controls:

- Field Name:** A text input field with a search icon.
- *Type:** A dropdown menu with 'Character' selected.
- *Format:** A dropdown menu with 'Upper' selected.
- Length:** A text input field with '11' entered.
- Decimals:** A text input field.
- *Edit Type:** A dropdown menu with 'No Table Edit' selected.
- *Heading Type:** A dropdown menu with 'Text' selected.
- Heading Text:** A text input field.
- *Unique Prompt Name:** A text input field with 'BIND1' entered.
- Prompt Table:** A text input field with a search icon.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom.



Expressions

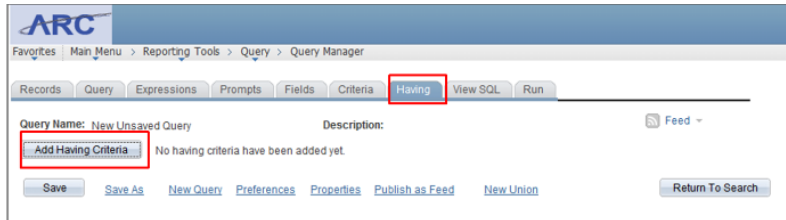
The screenshot shows the ARC Query Manager interface with the 'Expressions' tab selected. The 'Query Name' is 'New Unsaved Query' and the 'Description' is empty. The 'Add Expression' button is highlighted with a red box. Below it, a message states 'No expressions have been defined yet.' The bottom of the window contains buttons for 'Save', 'Save As', 'New Query', 'Preferences', 'Properties', 'Publish as Feed', 'New Union', and 'Return To Search'.

The left screenshot shows the 'Edit Expression Properties' dialog box. The '*Expression Type:' dropdown is set to 'Character'. The 'Length' is set to '1'. The 'Aggregate Function' checkbox is unchecked. The 'Expression Text' field is empty. The bottom buttons are 'Add Prompt', 'Add Field', 'OK', and 'Cancel'.

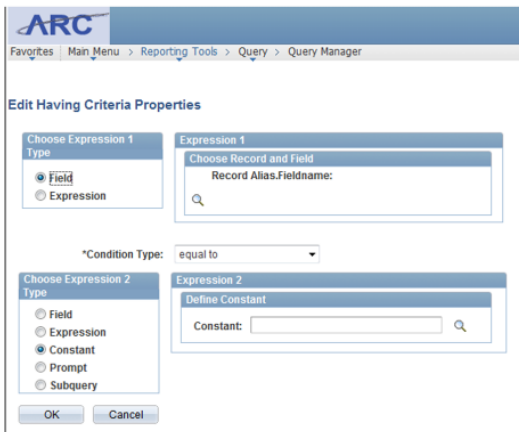
The right screenshot shows the same dialog box, but the '*Expression Type:' dropdown is open, displaying a list of options: 'Character', 'Date', 'Datetime', 'Drilling URL', 'Long Character', 'Number', 'Signed Number', and 'Time'.

Having

The Having page displays the specific fields and values that will limit the data returned when an aggregate function is used. Aggregate functions include Sum, Average, Max, Min, and Count.



The screenshot shows the ARC Query Manager interface. The 'Having' tab is selected and highlighted with a red box. The 'Add Having Criteria' button is also highlighted with a red box. The interface includes a breadcrumb trail: Favorites | Main Menu > Reporting Tools > Query > Query Manager. Below the breadcrumb, there are tabs for Records, Query, Expressions, Prompts, Fields, Criteria, Having, View SQL, and Run. The 'Having' tab is active. The main area displays 'Query Name: New Unsaved Query' and 'Description:'. Below this, there is a message: 'No having criteria have been added yet.' At the bottom, there are buttons for Save, Save As, New Query, Preferences, Properties, Publish as Feed, New Union, and Return To Search.



The screenshot shows the 'Edit Having Criteria Properties' dialog box. It has a title bar with the ARC logo. The dialog is divided into two main sections: 'Choose Expression 1' and 'Choose Expression 2'. Under 'Choose Expression 1', the 'Field' radio button is selected. Under 'Choose Expression 2', the 'Constant' radio button is selected. The 'Condition Type' is set to 'equal to'. The 'Expression 1' section contains a search box for 'Record Alias.FieldName:'. The 'Expression 2' section contains a search box for 'Define Constant' with a 'Constant:' label. At the bottom, there are 'OK' and 'Cancel' buttons.



Subquery

A sub query, sometimes called a sub-SELECT, is a query whose results are used by another query. The main query uses the sub query's result set as a comparison value for a selection criterion.

The screenshot shows the ARC Query Manager interface. The top navigation bar includes 'Favorites', 'Main Menu', 'Reporting Tools', 'Query', and 'Query Manager'. Below this is a tabbed interface with 'Records', 'Query', 'Expressions', 'Prompts', 'Fields', 'Criteria', 'Having', 'View SQL', and 'Run'. The 'Query' tab is active, showing 'Query Name: New Unsavd Query' and 'Description:'. A 'Feed' button is visible. Below the query information, it says 'Working on selection: Union 1'. A red box highlights a link labeled 'Subquery/Union Navigation'. Underneath is a section 'Find an Existing Record' with a search bar and a 'Search' button. Below the search bar is a 'Search Results' section with a table of records.

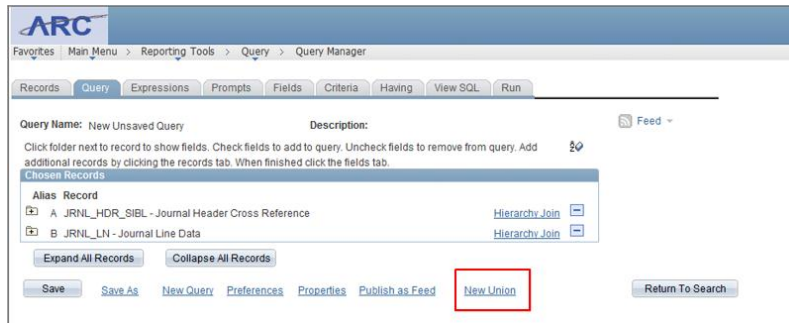
Record	Customize	Find	View All	First	1-20 of 20	Last
Rename						
GL_JRNL_CYDWN - Journal Operator Template	Add Record	Show Fields				
GL_JRNL_TMPLT - Journal Operator Template	Add Record	Show Fields				
JRNLGEN_DEFN - Journal Generator Acctg Defn	Add Record	Show Fields				
JRNLGEN_DEFNV - Journal Generator CF Mapping	Add Record	Show Fields				

The screenshot shows the ARC Query Manager interface with the 'Query' tab active. It displays the title 'Select subquery or union to navigate to'. Below this, there is a 'Left | Right' section with a tree view showing 'Top Level of Query' and 'Union 1'. A 'Cancel' button is located at the bottom left.



Union

Unions enable you to get the results from two or more separate queries at the same time. You can create a union of multiple queries only when the queries have the same number of selected fields with the same data types for all fields and they are all displayed in the same order.





Limitations of the Query Tool

Exporting to Excel

Whenever you export more than 64,000 rows, the additional rows will be added to subsequent sheets in the same document.

Advanced SQL

Not all SQL commands are not allowed to be part of the query tool. Some examples are below:

- Inline Views
- Right/Outer Join



Creating Advanced Queries

This is the Creating Advanced Queries lesson of the *Advanced ARC Reporting* course. Upon completion of this lesson, you will be able to:

- Create advanced queries using components such as joins, unions, and expressions

Estimated Time to Complete Lesson: 30 minutes



Group Exercise

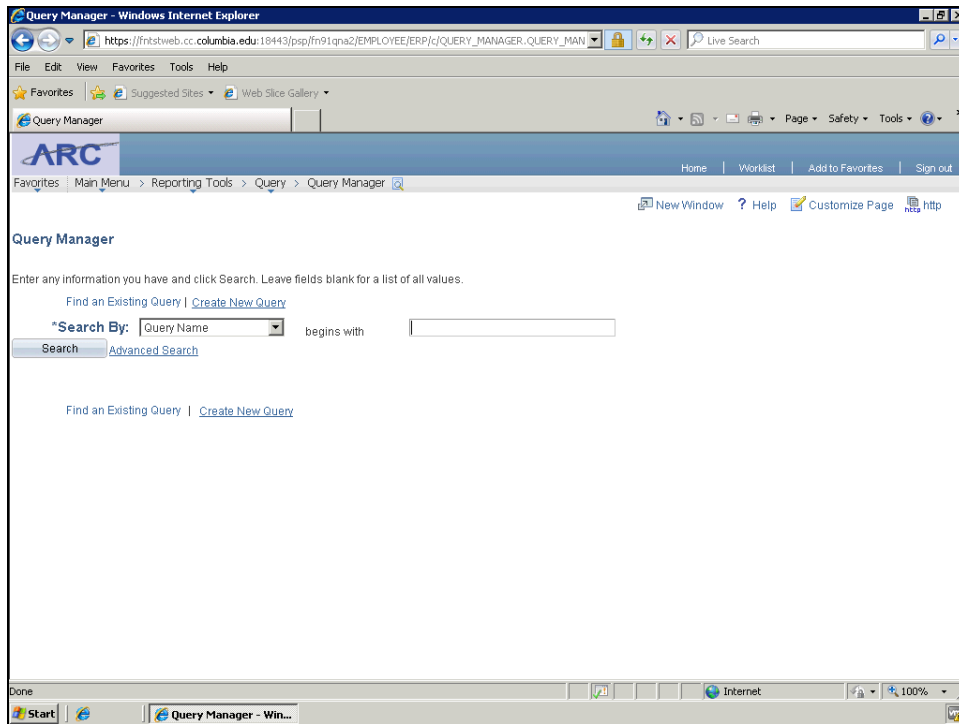
In this scenario you will learn how to add advanced components to the Voucher Count query that you created in the *Creating Basic Queries* lesson of this course.

- CU_AP_VOUCHER_COUNT_TRAINING

Joining Records

Procedure

Welcome to the Joining Records topic. In this topic you will learn how to join two records when creating a query.



Step	Action
1.	Enter the desired information into the Search By field. Enter "CU_AP_VOUCHER_COUNT_TRAINING" .



Training Guide

Advanced ARC Reporting

Query Manager - Windows Internet Explorer

https://frkstweb.cc.columbia.edu:18443/psp/fm91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home | Worklist | Add to Favorites | Sign out

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

New Window ? Help Customize Page http

Query Manager

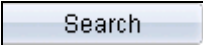
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Query | Create New Query

*Search By: Query Name begins with CU_AP_VOUCHER_COUNT_TRAINING

Search Advanced Search

Find an Existing Query | Create New Query

Step	Action
2.	Click the Search button. 

Query Manager - Windows Internet Explorer

https://frkstweb.cc.columbia.edu:18443/psp/fm91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home | Worklist | Add to Favorites | Sign out

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

New Window ? Help Customize Page http

Query Manager

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

Find an Existing Query | Create New Query

*Search By: Query Name begins with CU_AP_VOUCHER_COUNT_TRAINING

Search Advanced Search

Search Results

*Folder View: -- All Folders --

Check All Uncheck All *Action: -- Choose -- Go


Query	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input type="checkbox"/>	CU_AP_VOUCHER_COUNT_TRAINING	Count of Vouchers	Public		Edit	HTML	Excel	XML	Schedule

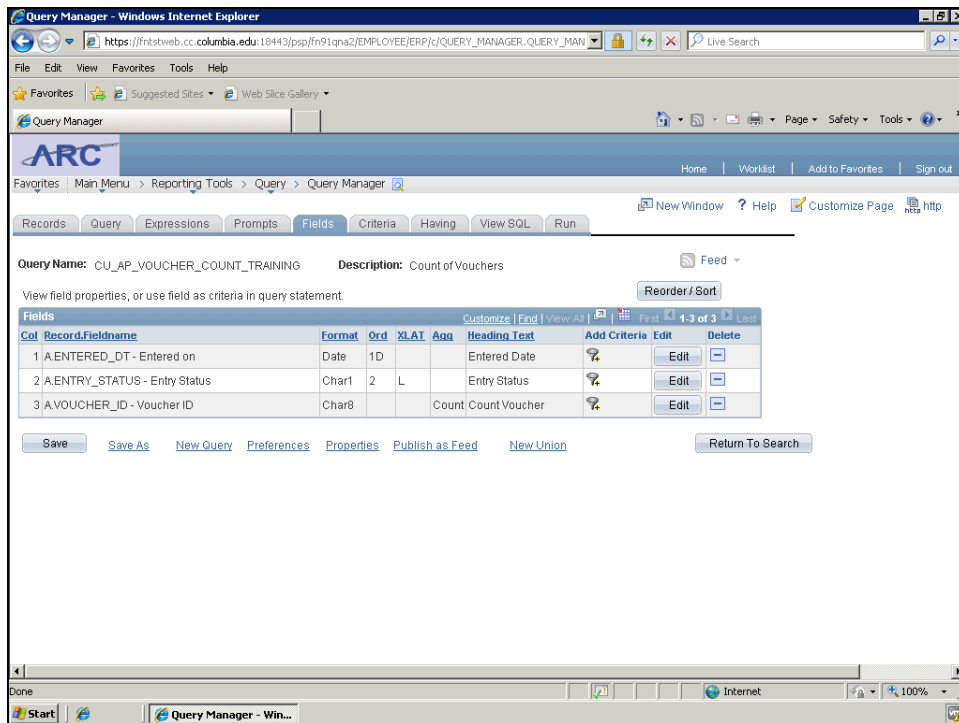
Find an Existing Query | Create New Query


Training Guide

Advanced ARC Reporting



Step	Action
3.	Click the Edit link. 



Step	Action
4.	Click the Records tab. 



Training Guide Advanced ARC Reporting

Query Manager - Windows Internet Explorer

https://frstweb.cc.columbia.edu:18443/psp/fr91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER_QUERY_MAN

File Edit View Favorites Tools Help

ARC

Home | Worklist | Add to Favorites | Sign out

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

Records Query Expressions Prompts Fields Criteria Having View SQL Run

New Window ? Help Customize Page http

Query Name: CU_AP_VOUCHER_COUNT_TRAINING Description: Count of Vouchers Feed

Find an Existing Record

*Search By: Record Name begins with

Search Advanced Search

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

Step	Action
5.	Enter the desired information into the begins with field. Enter "VOUCHER_LINE" .

Query Manager - Windows Internet Explorer

https://frstweb.cc.columbia.edu:18443/psp/fr91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER_QUERY_MAN

File Edit View Favorites Tools Help

ARC

Home | Worklist | Add to Favorites | Sign out

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

Records Query Expressions Prompts Fields Criteria Having View SQL Run

New Window ? Help Customize Page http

Query Name: CU_AP_VOUCHER_COUNT_TRAINING Description: Count of Vouchers Feed

Find an Existing Record

*Search By: Record Name begins with VOUCHER_LINE

Search Advanced Search

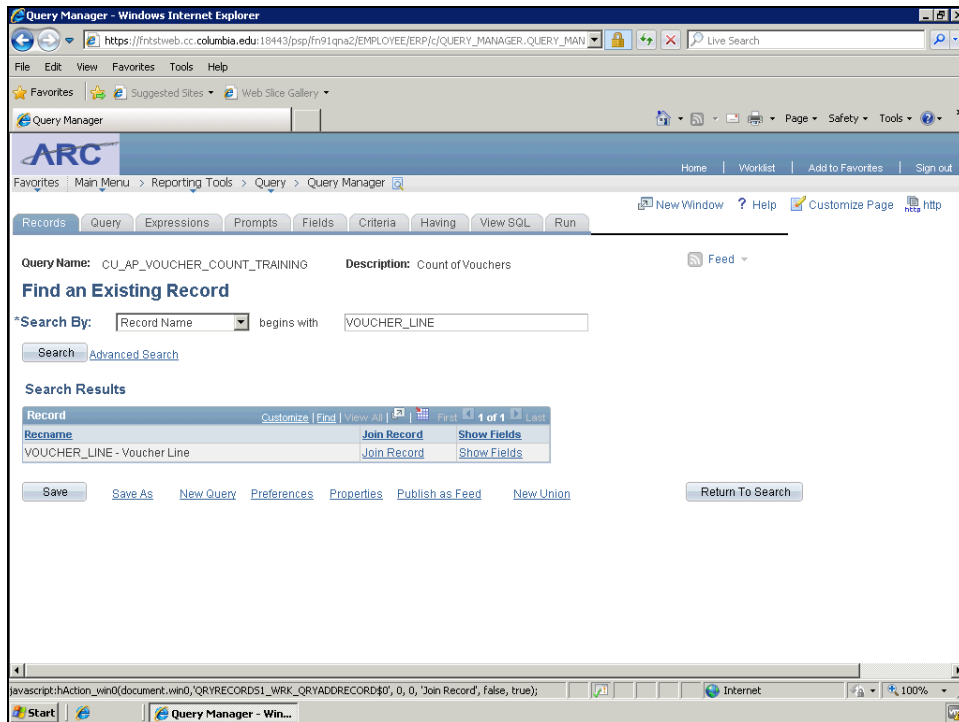
Save Save As New Query Preferences Properties Publish as Feed New Union Return To Search

Training Guide

Advanced ARC Reporting



Step	Action
6.	Click the Search button. <div>Search</div>



Step	Action
7.	Click the Join Record link. <div>Join Record</div>



Training Guide Advanced ARC Reporting

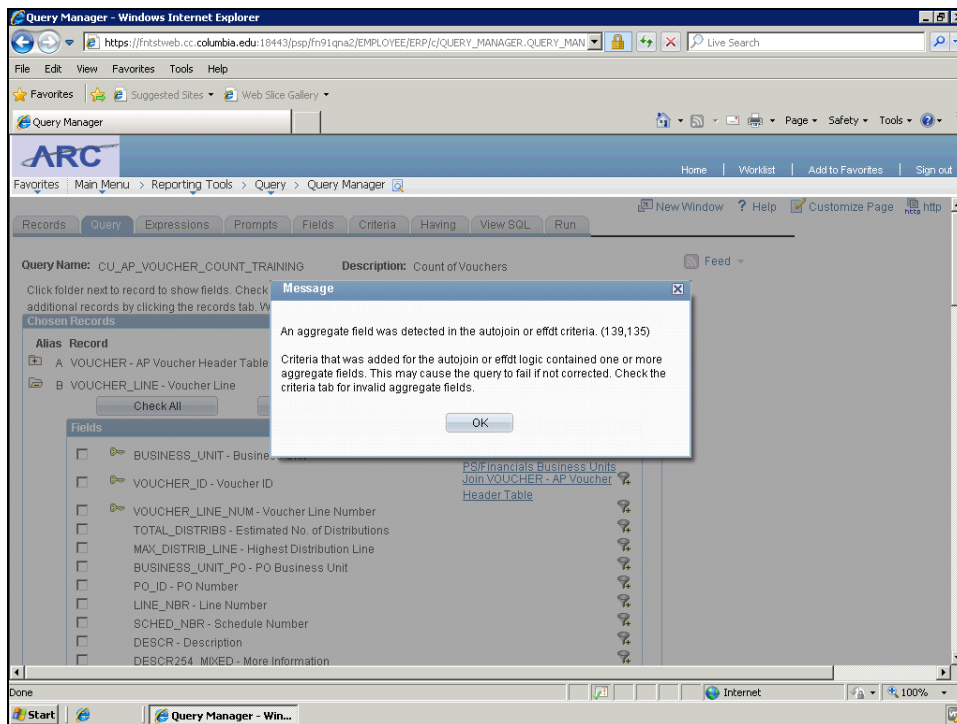
Step	Action
8.	Click the A = VOUCHER - AP Voucher Header Table link. <u>A = VOUCHER - AP Voucher Header Table</u>

Training Guide

Advanced ARC Reporting



Step	Action
9.	Click the Add Criteria button. <div>Add Criteria</div>

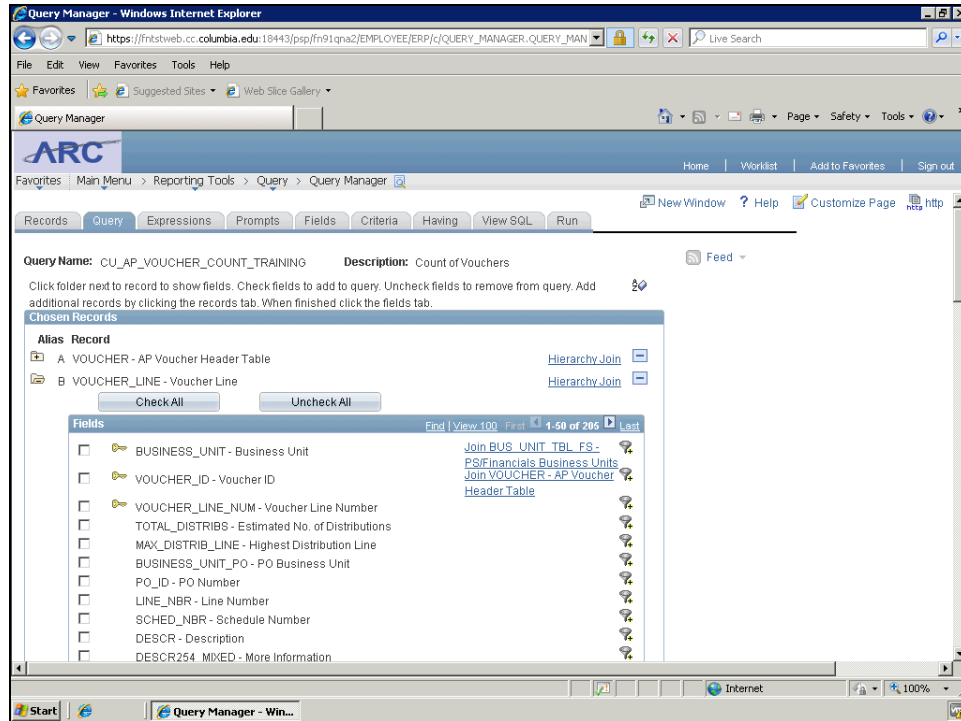


Step	Action
10.	Click the OK button. <div>OK</div>

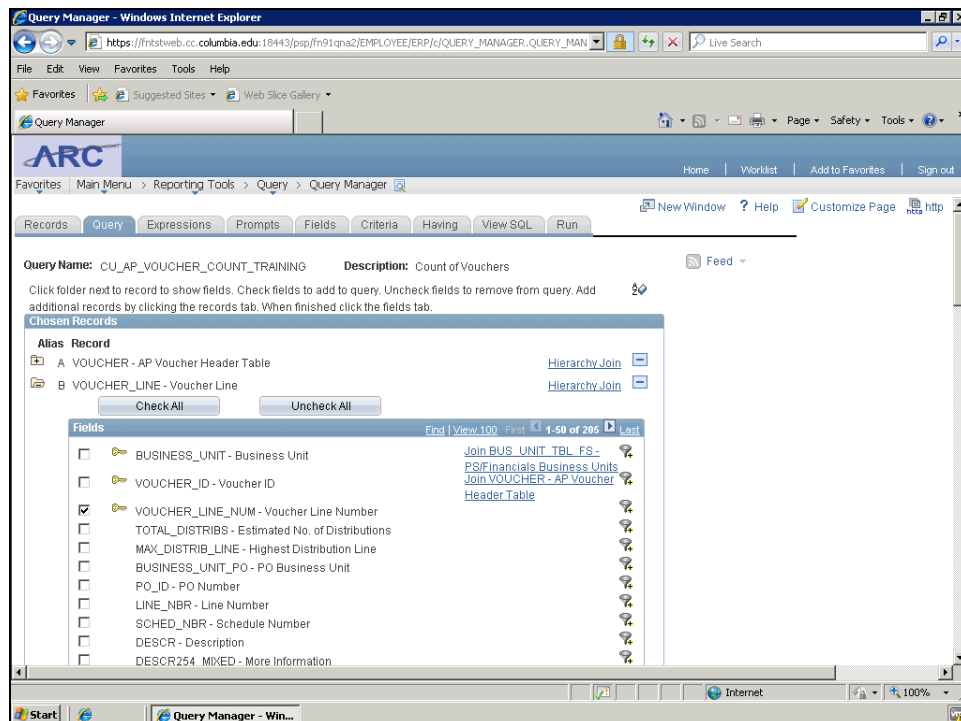


Training Guide

Advanced ARC Reporting



Step	Action
11.	Click the Select option. <input type="checkbox"/>

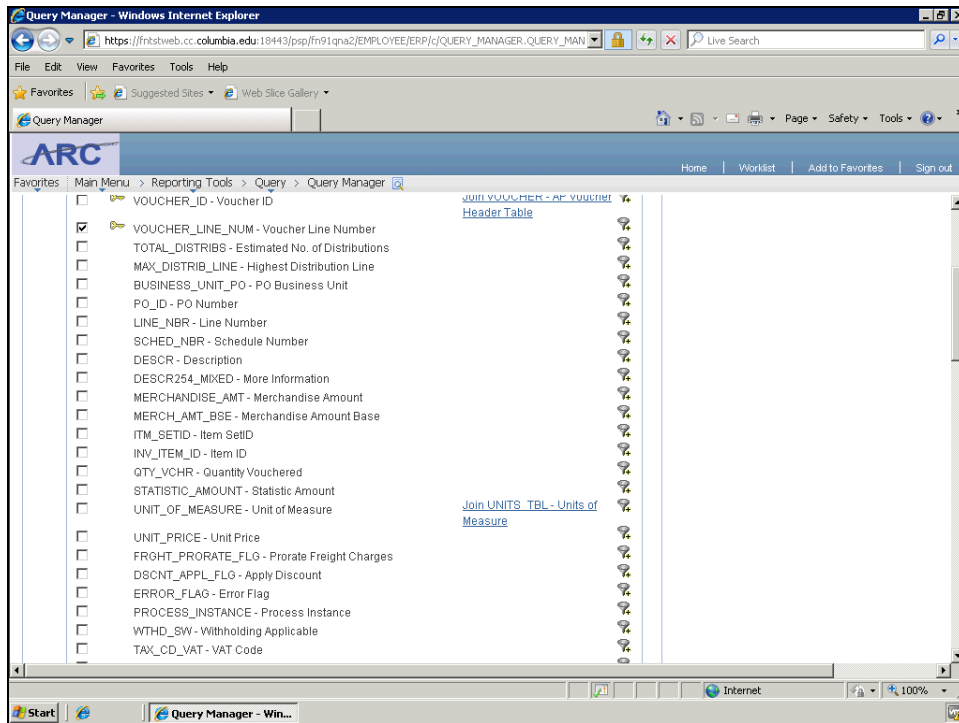


Training Guide

Advanced ARC Reporting



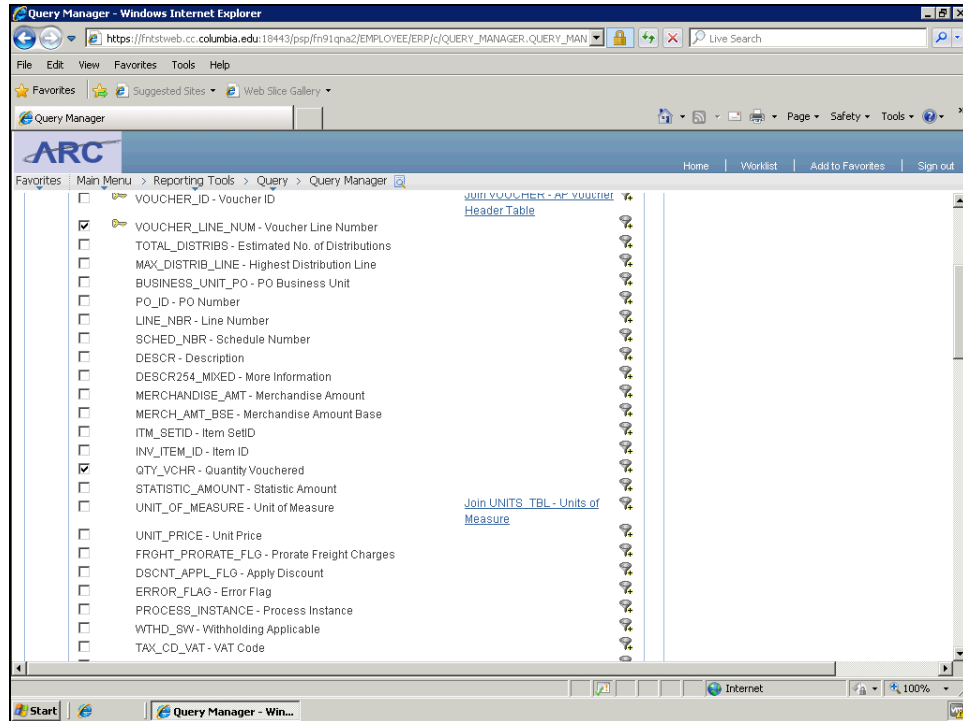
Step	Action
12.	Click the scrollbar.



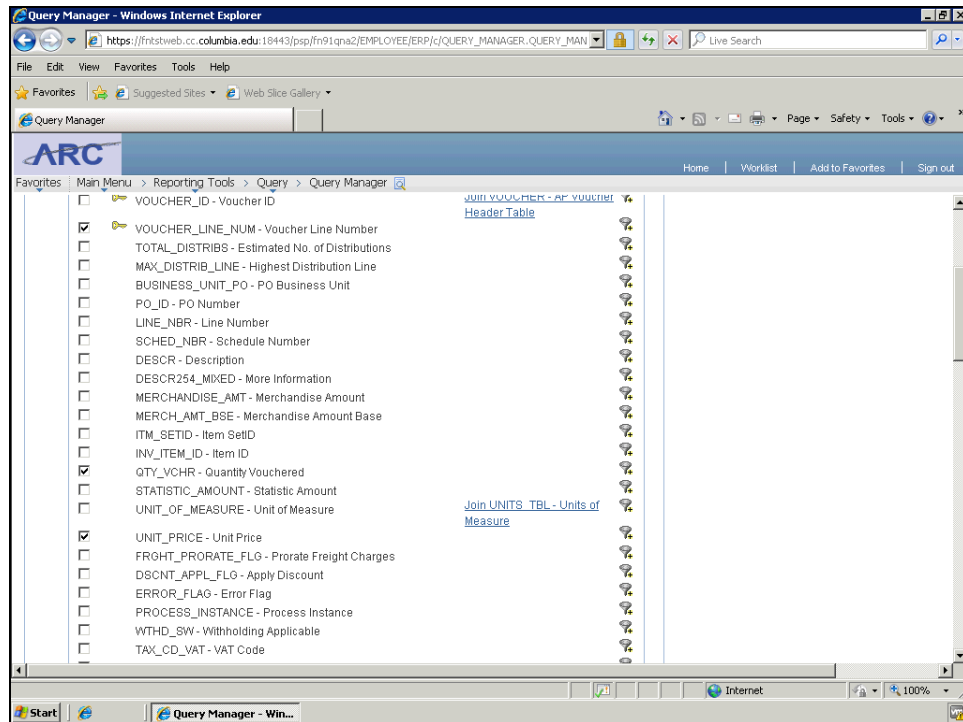
Step	Action
13.	Click the Select option. <input type="checkbox"/>



Training Guide Advanced ARC Reporting



Step	Action
14.	Click the Select option. <input type="checkbox"/>

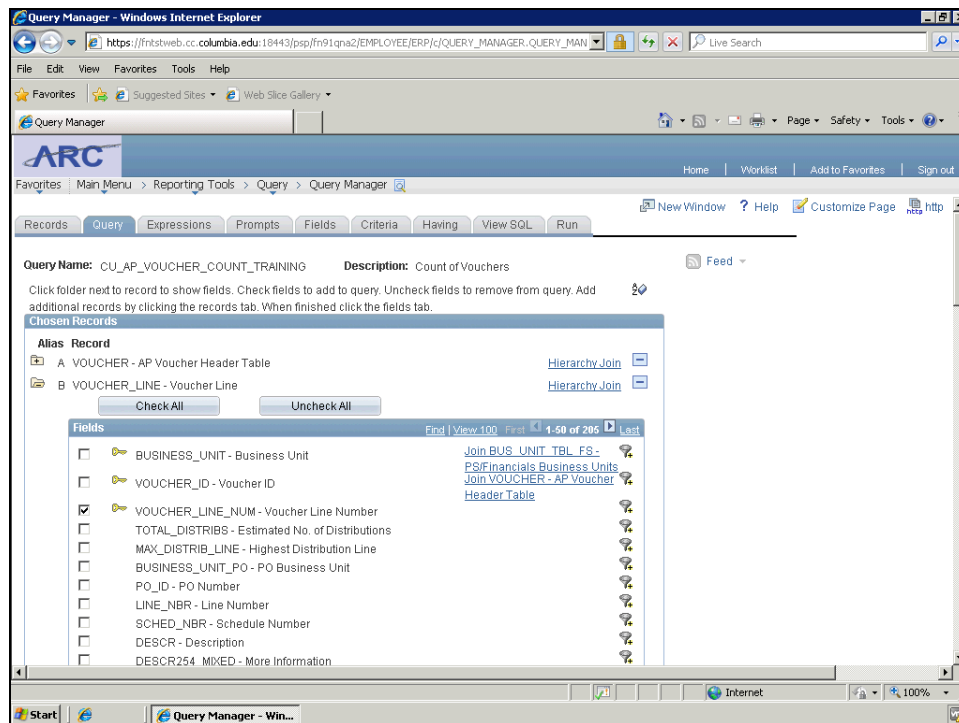


Training Guide

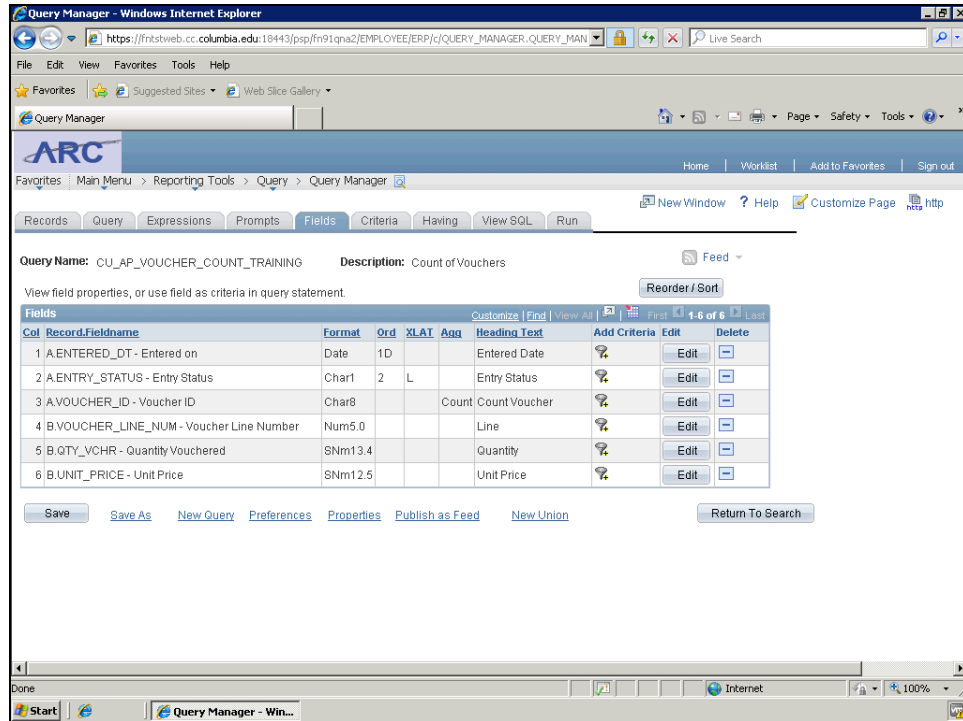
Advanced ARC Reporting



Step	Action
15.	Click the scrollbar.



Step	Action
16.	Click the Fields tab. <div data-bbox="342 1253 467 1306" data-label="Image"> </div>



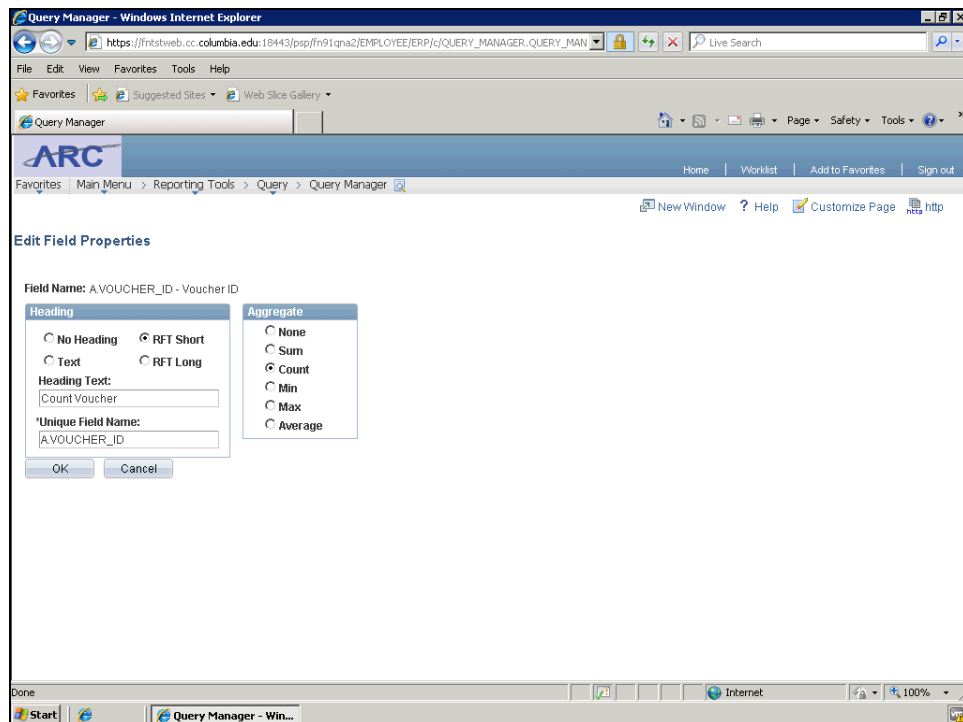
Query Name: CU_AP_VOUCHER_COUNT_TRAINING Description: Count of Vouchers

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

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A. ENTERED_DT - Entered on	Date	1D			Entered Date		Edit	
2	A. ENTRY_STATUS - Entry Status	Char1	2	L		Entry Status		Edit	
3	A. VOUCHER_ID - Voucher ID	Char8			Count	Count Voucher		Edit	
4	B. VOUCHER_LINE_NUM - Voucher Line Number	Num5.0				Line		Edit	
5	B. QTY_VCHR - Quantity Vouchered	SNm13.4				Quantity		Edit	
6	B. UNIT_PRICE - Unit Price	SNm12.5				Unit Price		Edit	

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

Step	Action
17.	Click the Edit button.



Field Name: A. VOUCHER_ID - Voucher ID

Heading

☐ No Heading ☒ RFT Short

☐ Text ☐ RFT Long

Heading Text:
Count Voucher

Unique Field Name:
A. VOUCHER_ID

Aggregate

☐ None

☒ Sum

☒ Count

☐ Min

☐ Max


☐ Average

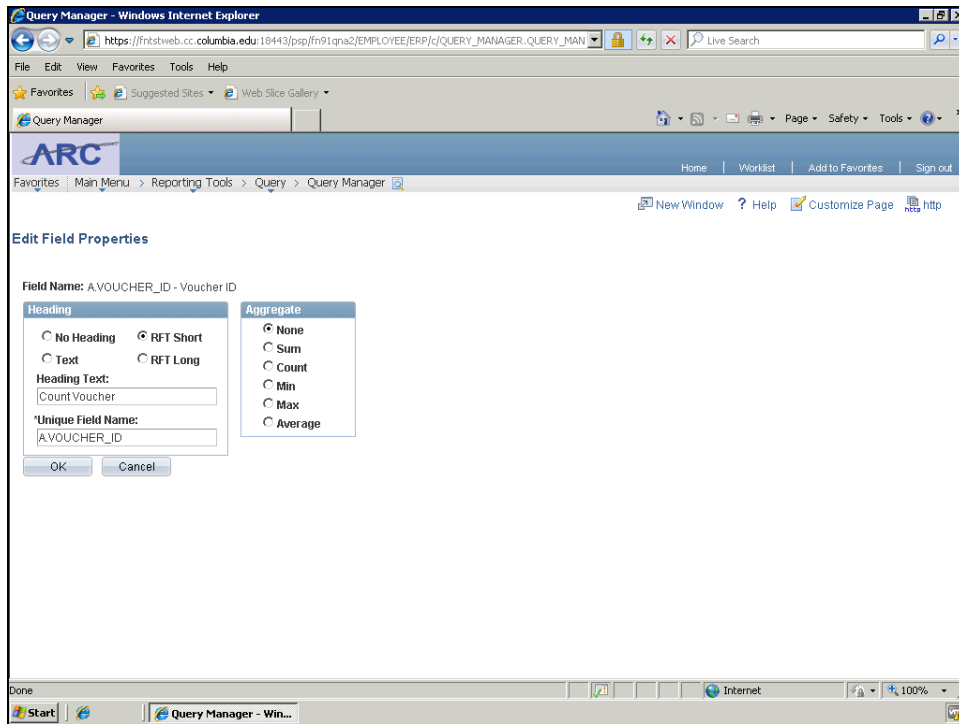
Buttons: OK, Cancel

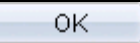
Training Guide

Advanced ARC Reporting



Step	Action
18.	Click the None option. 



Step	Action
19.	Click the OK button. 



Training Guide

Advanced ARC Reporting

Query Manager - Windows Internet Explorer

https://firstweb.cc.columbia.edu:18443/psp/fr91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER_QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

Home | Worklist | Add to Favorites | Sign out

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

Records Query Expressions Prompts Fields Criteria Having View SQL Run

New Window ? Help Customize Page http


Query Name: CU_AP_VOUCHER_COUNT_TRAINING Description: Count of Vouchers

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

Reorder / Sort

Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A. ENTERED_DT - Entered on	Date	1D			Entered Date		Edit	
2	A. ENTRY_STATUS - Entry Status	Char1	2	L		Entry Status		Edit	
3	A. VOUCHER_ID - Voucher ID	Char8				Voucher		Edit	
4	B. VOUCHER_LINE_NUM - Voucher Line Number	Num5.0				Line		Edit	
5	B. QTY_VCHR - Quantity Vouchered	SNM13.4				Quantity		Edit	
6	B. UNIT_PRICE - Unit Price	SNM12.5				Unit Price		Edit	

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

Step	Action
20.	Click the Run tab. 

Query Manager - Windows Internet Explorer

https://firstweb.cc.columbia.edu:18443/psp/fr91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER_QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

Home | Worklist | Add to Favorites | Sign out

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

Records Query Expressions Prompts Fields Criteria Having View SQL Run

New Window ? Help Customize Page http

View All | Rerun Query | Download to Excel | Download to XML

First 1-100 of 5548 Last

	Entered Date	Entry Status	Voucher	Line	Quantity	Unit Price
1	07/03/2012	Postable	00017604	1	0.0000	0.00000
2	07/02/2012	Postable	00017602	1	1.0000	200.00000
3	07/02/2012	Postable	00017587	1	1.0000	200.00000
4	07/02/2012	Postable	00017586	1	1.0000	100.00000
5	07/02/2012	Postable	00017595	1	1.0000	300.00000
6	07/02/2012	Postable	00017594	1	1.0000	200.00000
7	07/02/2012	Postable	00017583	1	1.0000	100.00000
8	07/02/2012	Postable	00017597	1	1.0000	300.00000
9	07/02/2012	Postable	00017596	1	1.0000	200.00000
10	07/02/2012	Postable	00017595	1	1.0000	100.00000
11	07/02/2012	Postable	00017603	1	1.0000	300.00000
12	07/02/2012	Postable	00017588	1	1.0000	300.00000
13	07/02/2012	Postable	00017601	1	1.0000	100.00000
14	07/02/2012	Postable	00017600	1	1.0000	300.00000
15	07/02/2012	Postable	00017599	1	1.0000	200.00000
16	07/02/2012	Postable	00017598	1	1.0000	100.00000
17	07/02/2012	Postable	00017594	1	1.0000	300.00000



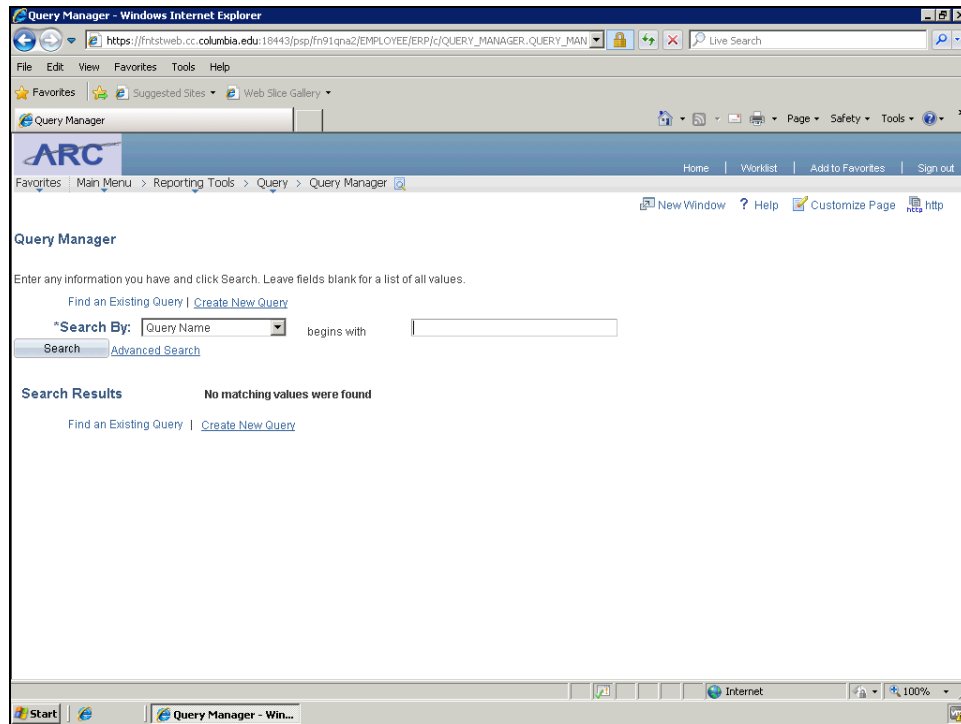
Step	Action
21.	You have successfully joined two records in a query. End of Procedure.



Creating an Advanced Query

Procedure

Welcome to the Creating an Advanced Query topic. In this topic you will learn how to add expressions, prompts and other advanced components to your query.



Step	Action
1.	Enter the desired information into the Search By field. Enter "CU_AP_VOUCHER_COUNT_TRAINING" .

Training Guide

Advanced ARC Reporting



Query Manager - Windows Internet Explorer

https://fnstweb.cc.columbia.edu:18443/psp/fm91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER_QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home | Worklist | Add to Favorites | Sign out

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

New Window ? Help Customize Page http

Query Manager

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

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

*Search By: Query Name begins with CU_AP_VOUCHER_COUNT_TRAINING

Search Advanced Search

Search Results No matching values were found

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

Step	Action
2.	Click the Search button.

Query Manager - Windows Internet Explorer

https://fnstweb.cc.columbia.edu:18443/psp/fm91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER_QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home | Worklist | Add to Favorites | Sign out

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

New Window ? Help Customize Page http

Query Manager

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

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

*Search By: Query Name begins with CU_AP_VOUCHER_COUNT_TRAINING

Search Advanced Search

Perform Search

Search Results

*Folder View: -- All Folders --


Check All Uncheck All *Action: -- Choose -- Go

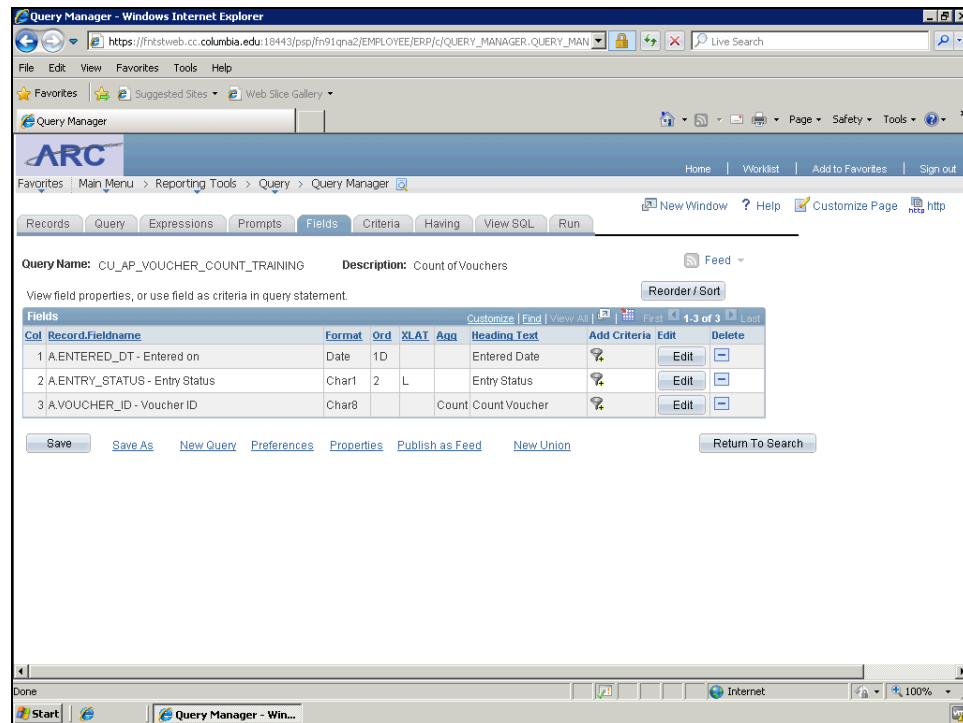
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input type="checkbox"/>	CU_AP_VOUCHER_COUNT_TRAINING	Count of Vouchers	Public		Edit	HTML	Excel	XML	Schedule


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



Training Guide Advanced ARC Reporting

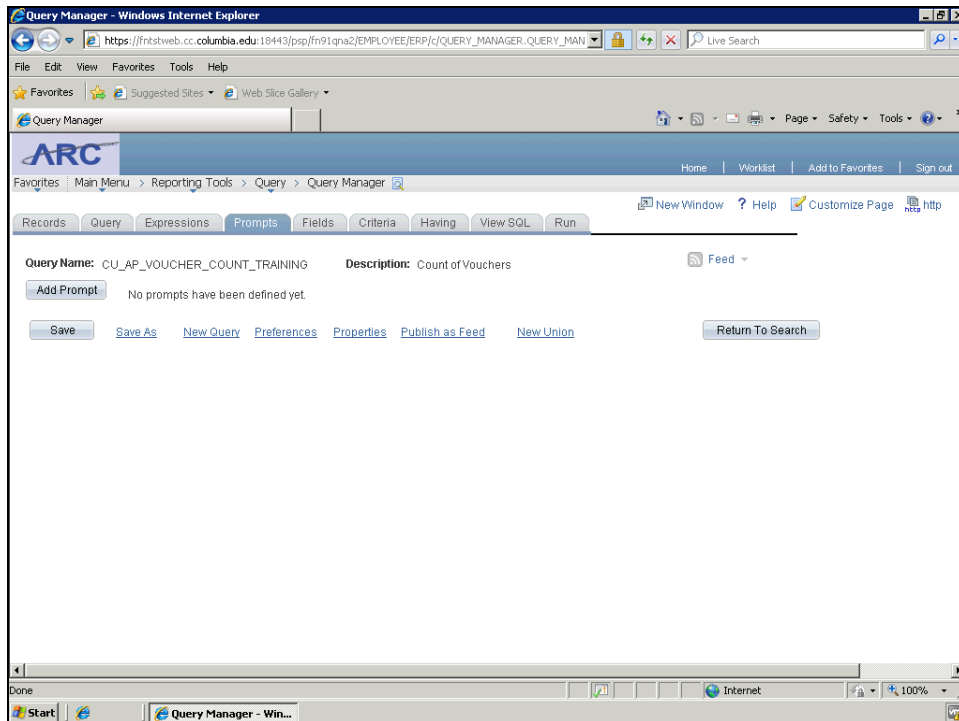
Step	Action
3.	Click the Edit link. 



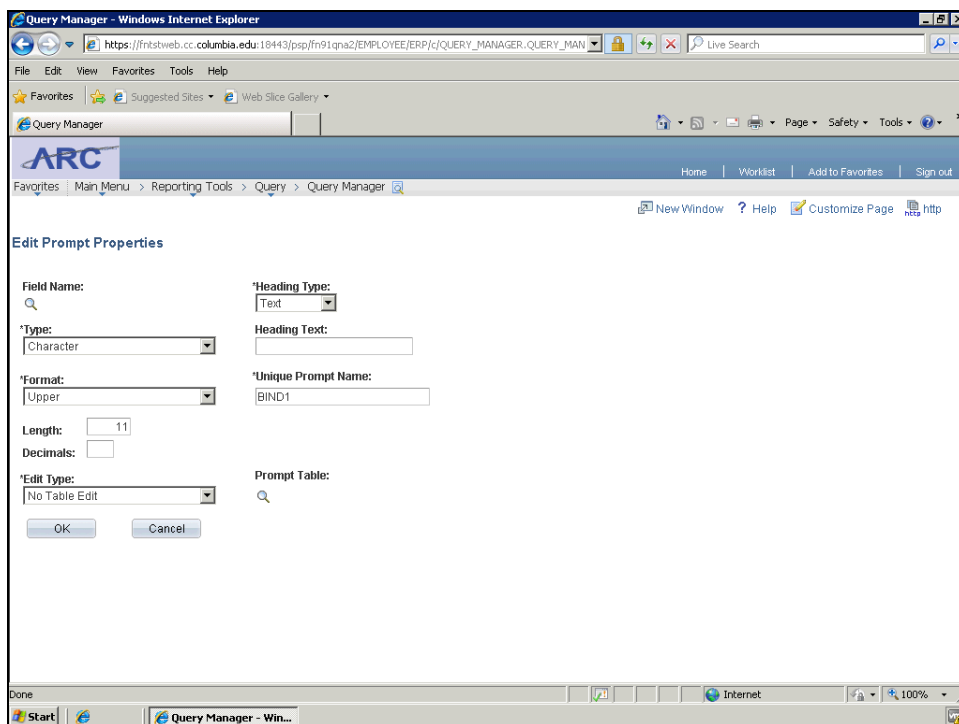
Step	Action
4.	Click the Prompts tab. 


Training Guide

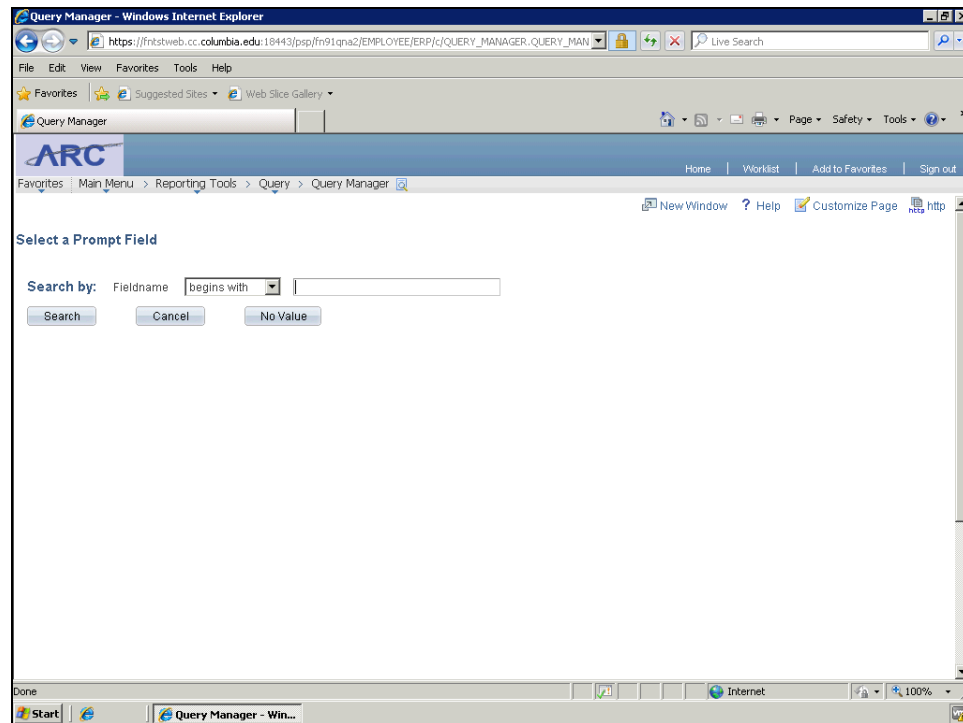
Advanced ARC Reporting



Step	Action
5.	Click the Add Prompt button. <div>Add Prompt</div>



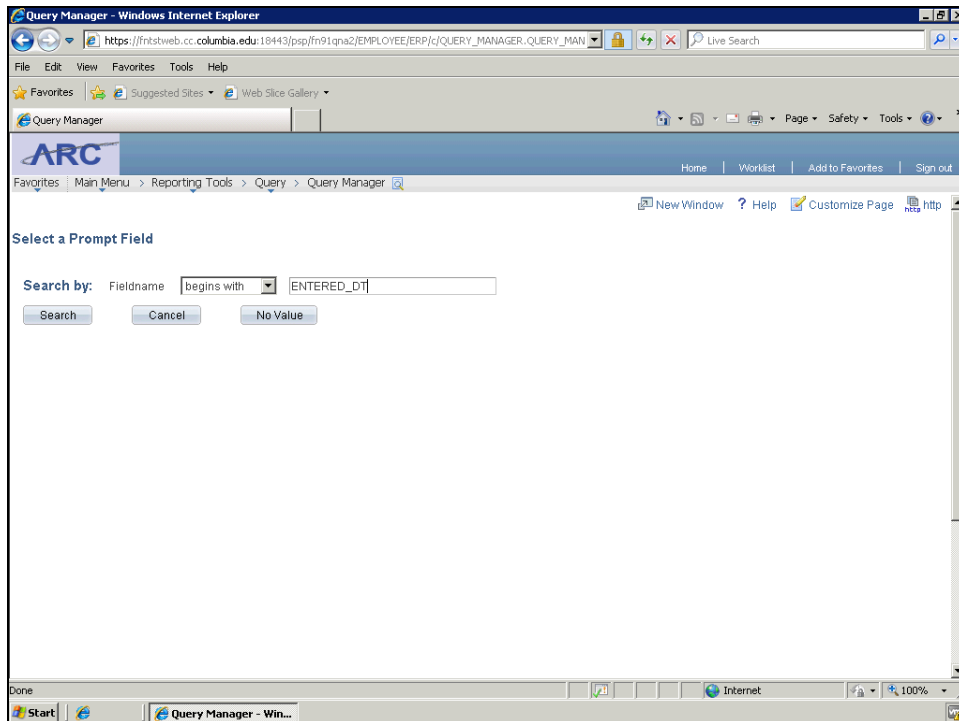
Step	Action
6.	Click the Select Field button. 



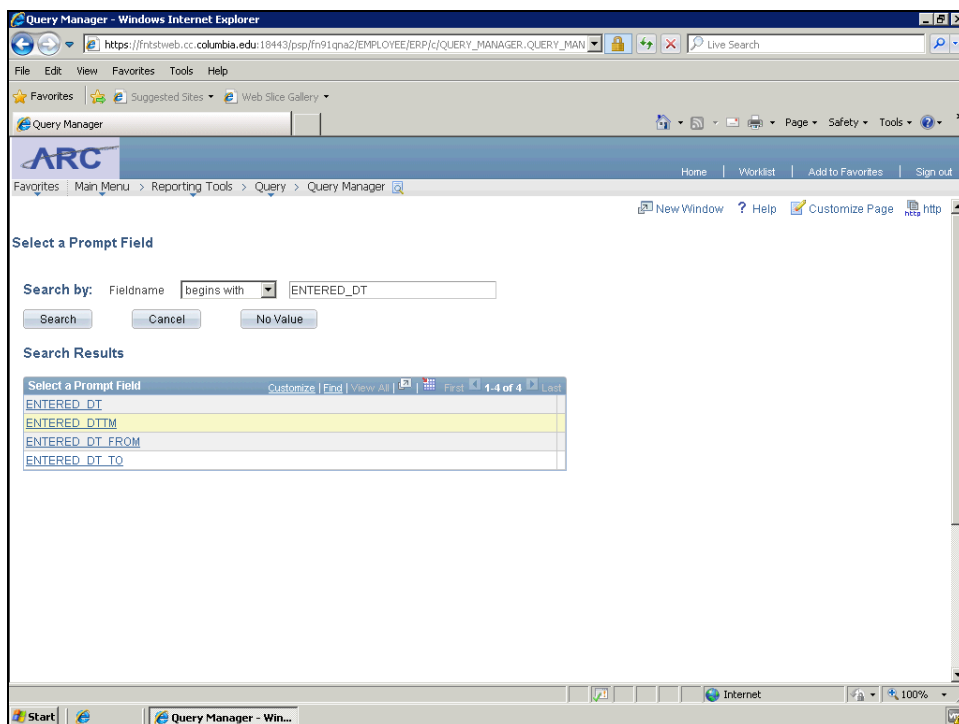
Step	Action
7.	Enter the desired information into the Search by field. Enter " ENTERED_DT ".


Training Guide

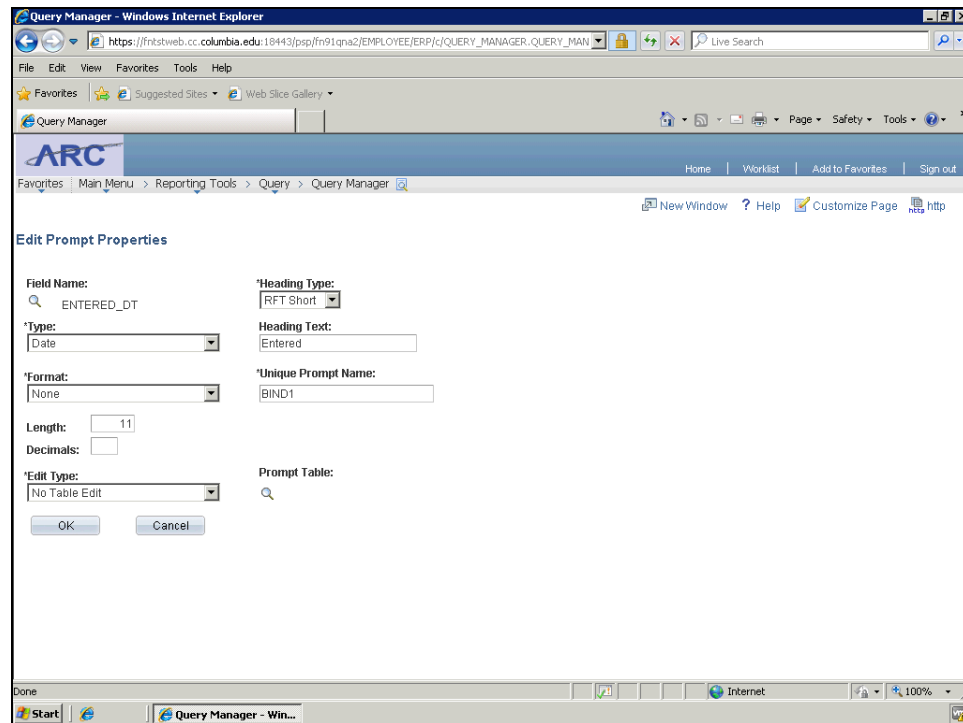
Advanced ARC Reporting




Step	Action
8.	Click the Search button. <div>Search</div>



Step	Action
9.	Click the ENTERED_DT link. 



Step	Action
10.	Click in the Heading Text field. 

Training Guide

Advanced ARC Reporting



Edit Prompt Properties

Field Name: ENTERED_DT

Type: Date

Format: None

Length: 11

Decimals: 0

Edit Type: No Table Edit

Heading Type: RFT Short

Heading Text: Entered

Unique Prompt Name: BIND1

Prompt Table:

OK Cancel

Step	Action
11.	Enter the desired information into the Heading Text field. Enter " Entered Date From ".

Edit Prompt Properties

Field Name: ENTERED_DT

Type: Date

Format: None

Length: 11

Decimals: 0

Edit Type: No Table Edit

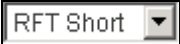
Heading Type: RFT Short

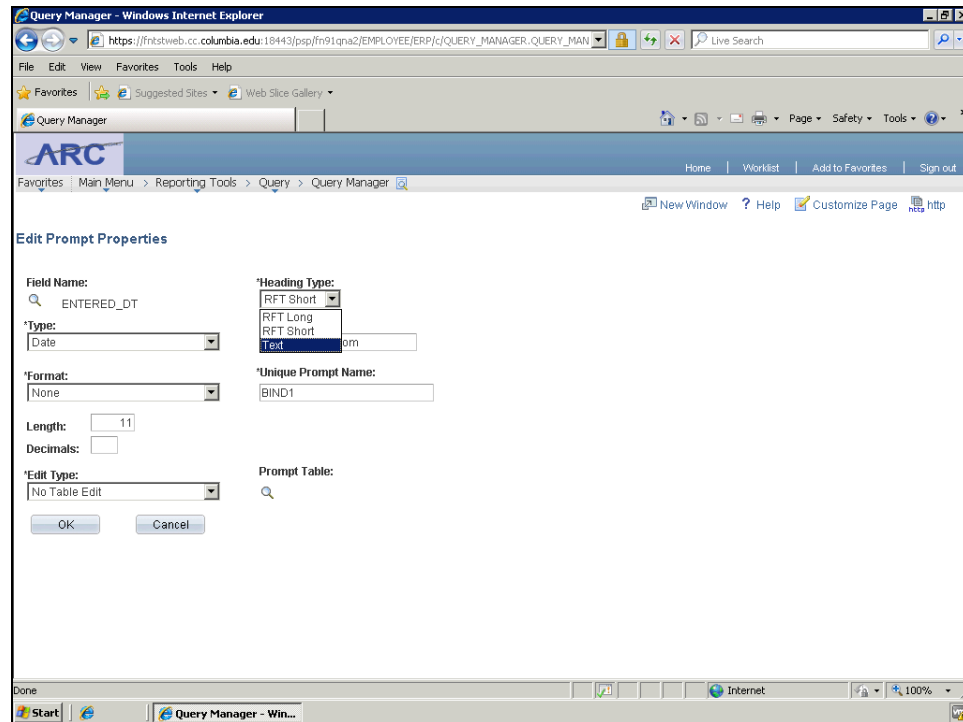
Heading Text: Entered Date From


Unique Prompt Name: BIND1

Prompt Table:

OK Cancel

Step	Action
12.	Click the Heading Type list. 



Step	Action
13.	Click the Text list item. 

Training Guide

Advanced ARC Reporting



Edit Prompt Properties

Field Name: ENTERED_DT

Type: Date

Format: None

Length: 11

Decimals:

Edit Type: No Table Edit

Heading Type: Text

Heading Text: Entered Date From

Unique Prompt Name: BIND1

Prompt Table:

OK Cancel


Step	Action
14.	Click the OK button. <div>OK</div>

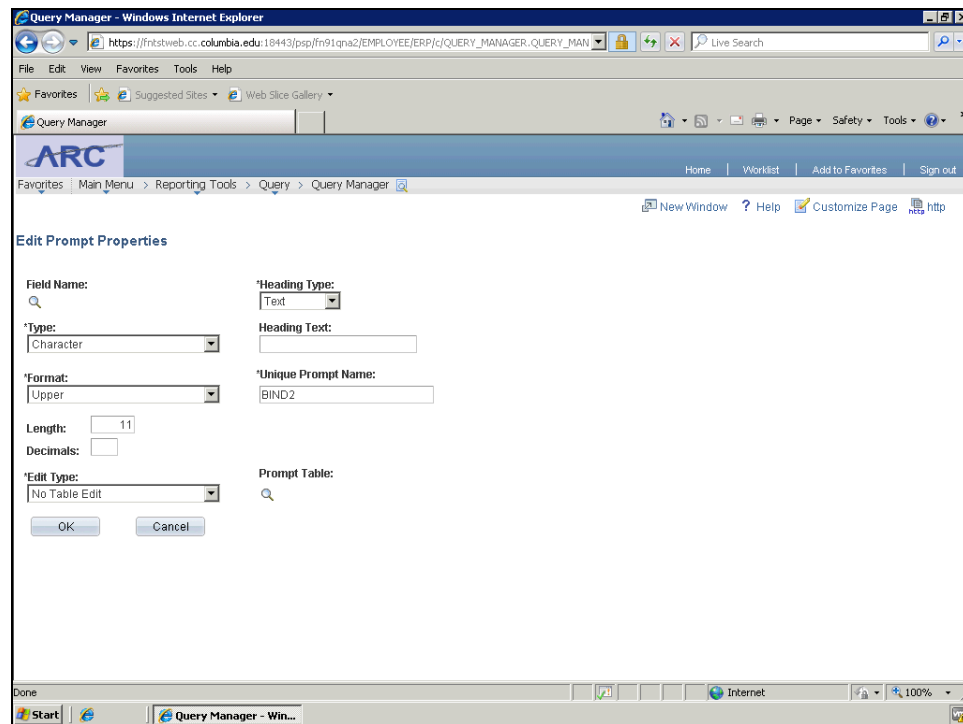
Query Name: CU_AP_VOUCHER_COUNT_TRAINING **Description:** Count of Vouchers

Prompts List

Prompt	Edit	Delete
:1 = ENTERED_DT - Entered Date From	Edit	Delete

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


Step	Action
15.	Click the Add Prompt button. 



The screenshot shows the 'Query Manager - Windows Internet Explorer' window. The address bar displays the URL: https://fnkstweb.cc.columbia.edu:18443/psp/m91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER_QUERY_MAN. The page title is 'Query Manager'. The breadcrumb navigation shows: 'Favorites | Main Menu > Reporting Tools > Query > Query Manager'. The 'Edit Prompt Properties' dialog box is open, showing the following fields:

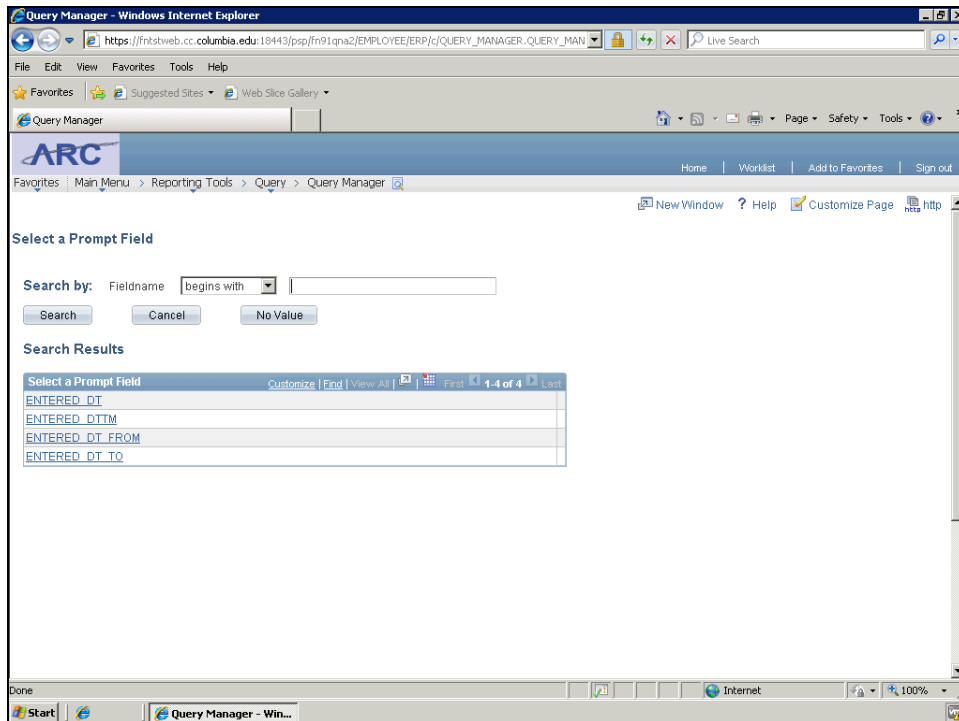
- Field Name:** (Search icon)
- Heading Type:** Text
- Type:** Character
- Heading Text:** (Text field)
- Format:** Upper
- Unique Prompt Name:** BIND2
- Length:** 11
- Decimals:** (Text field)
- Edit Type:** No Table Edit
- Prompt Table:** (Search icon)

Buttons: OK, Cancel.

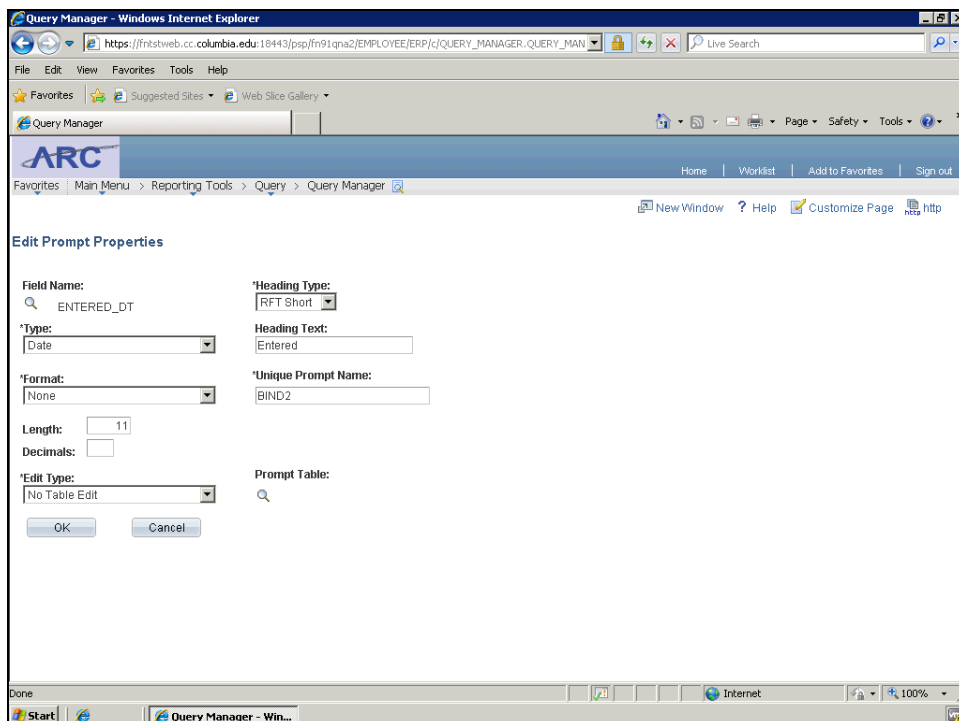
Step	Action
16.	Click the Select Field button. 

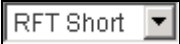
Training Guide

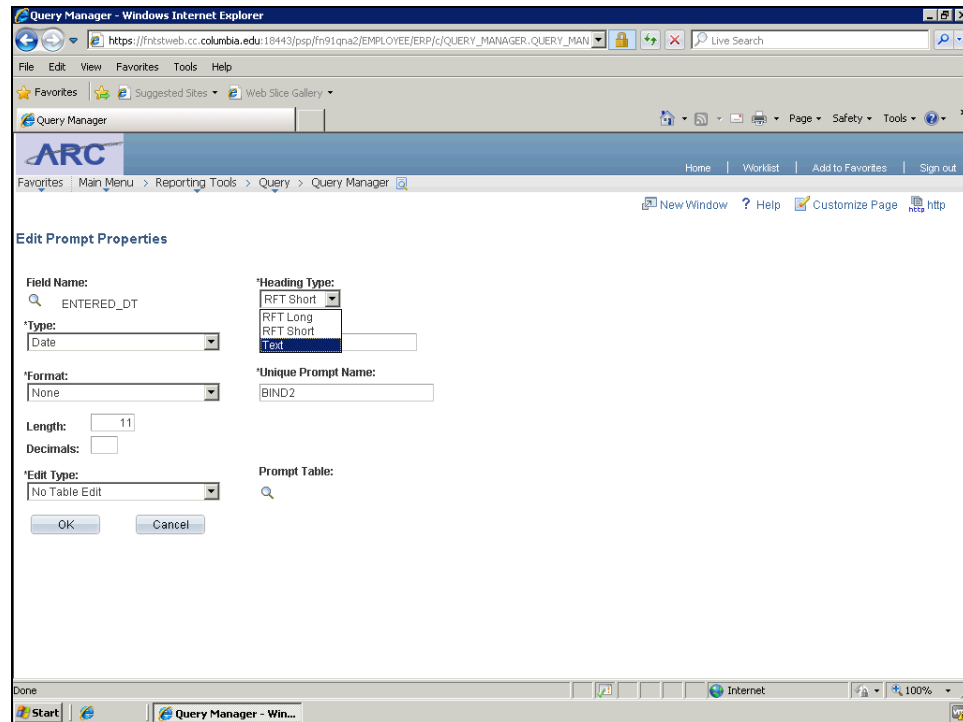
Advanced ARC Reporting




Step	Action
17.	Click the ENTERED_DT link. ENTERED_DT



Step	Action
18.	Click the Heading Type list. 



Step	Action
19.	Click the Text list item. 

Training Guide

Advanced ARC Reporting



Query Manager - Windows Internet Explorer

https://firstweb.cc.columbia.edu:18443/psp/fn91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home Worklist Add to Favorites Sign out

Favorites Main Menu Reporting Tools Query Query Manager

New Window Help Customize Page http

Edit Prompt Properties

Field Name: ENTERED_DT

Type: Date

Format: None

Length: 11

Decimals: 0

Edit Type: No Table Edit

Heading Type: Text

Heading Text: Entered

Unique Prompt Name: BIND2

Prompt Table:

OK Cancel

Step	Action
20.	Click in the Heading Text field. Entered

Query Manager - Windows Internet Explorer

https://firstweb.cc.columbia.edu:18443/psp/fn91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home Worklist Add to Favorites Sign out

Favorites Main Menu Reporting Tools Query Query Manager

New Window Help Customize Page http

Edit Prompt Properties

Field Name: ENTERED_DT

Type: Date

Format: None

Length: 11

Decimals: 0

Edit Type: No Table Edit

Heading Type: Text

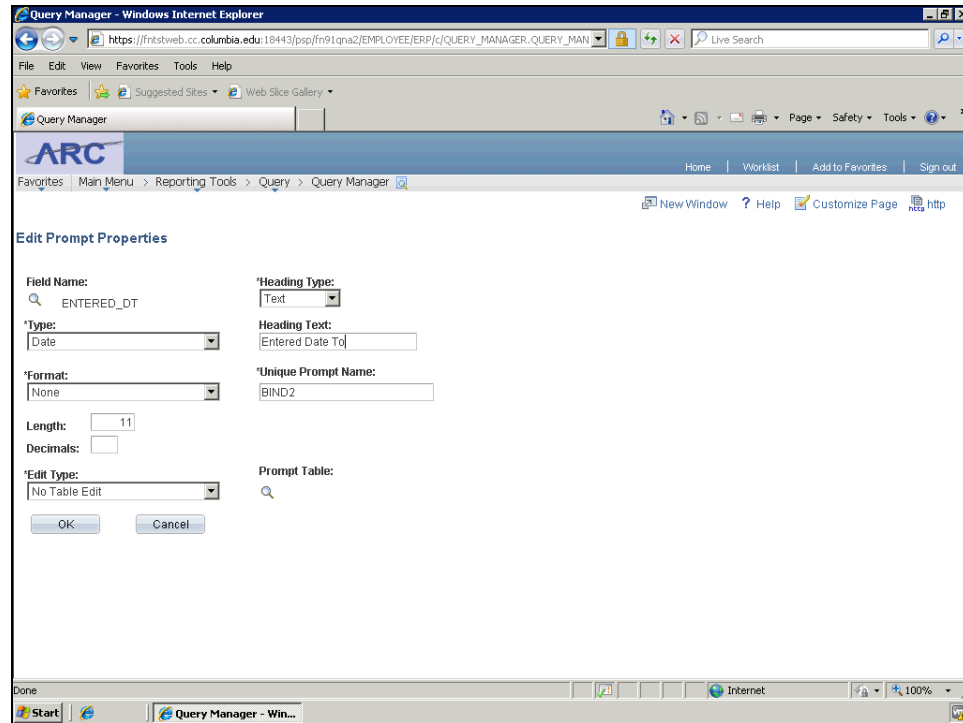
Heading Text: Entered

Unique Prompt Name: BIND2

Prompt Table:

OK Cancel

Step	Action
21.	Enter the desired information into the Heading Text field. Enter " Entered Date To ".



The screenshot shows the 'Query Manager - Windows Internet Explorer' window. The address bar displays the URL: https://frntstweb.cc.columbia.edu:18443/psp/frn91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER_QUERY_MAN. The page title is 'Query Manager'. The breadcrumb navigation shows: 'Main Menu > Reporting Tools > Query > Query Manager'. The 'Edit Prompt Properties' dialog box is open, showing the following fields:

- Field Name:** ENTERED_DT
- Heading Type:** Text
- Type:** Date
- Heading Text:** Entered Date To
- Format:** None
- Unique Prompt Name:** BIND2
- Length:** 11
- Decimals:** 0
- Edit Type:** No Table Edit
- Prompt Table:** (empty)

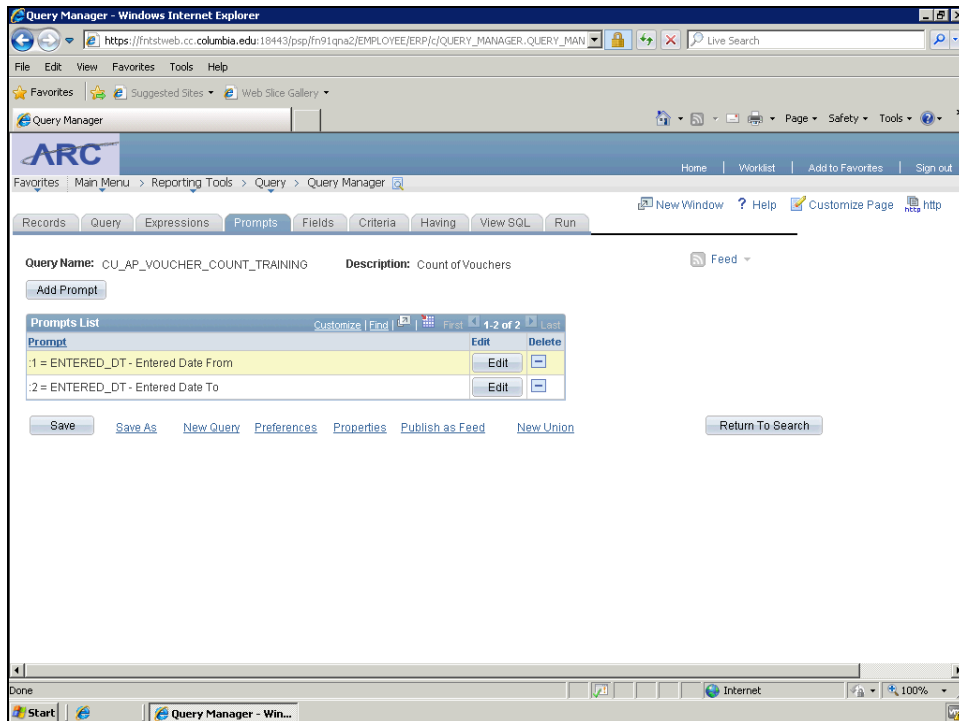
At the bottom of the dialog box are 'OK' and 'Cancel' buttons.

Step	Action
22.	Click the OK button.

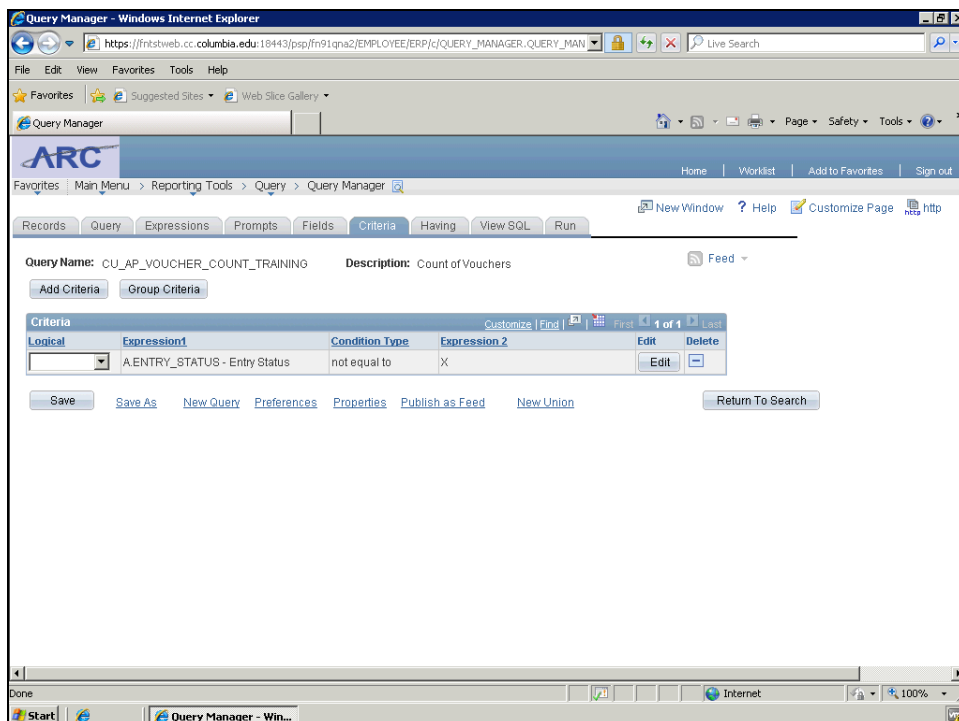
OK


Training Guide

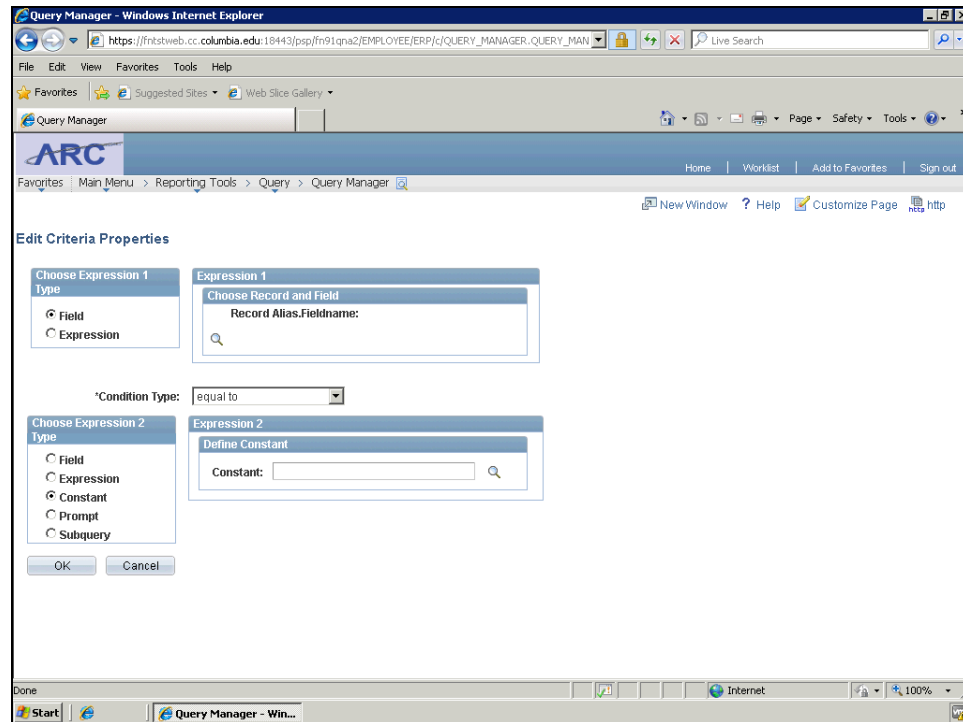
Advanced ARC Reporting




Step	Action
23.	Click the Criteria tab. <div>Criteria</div>



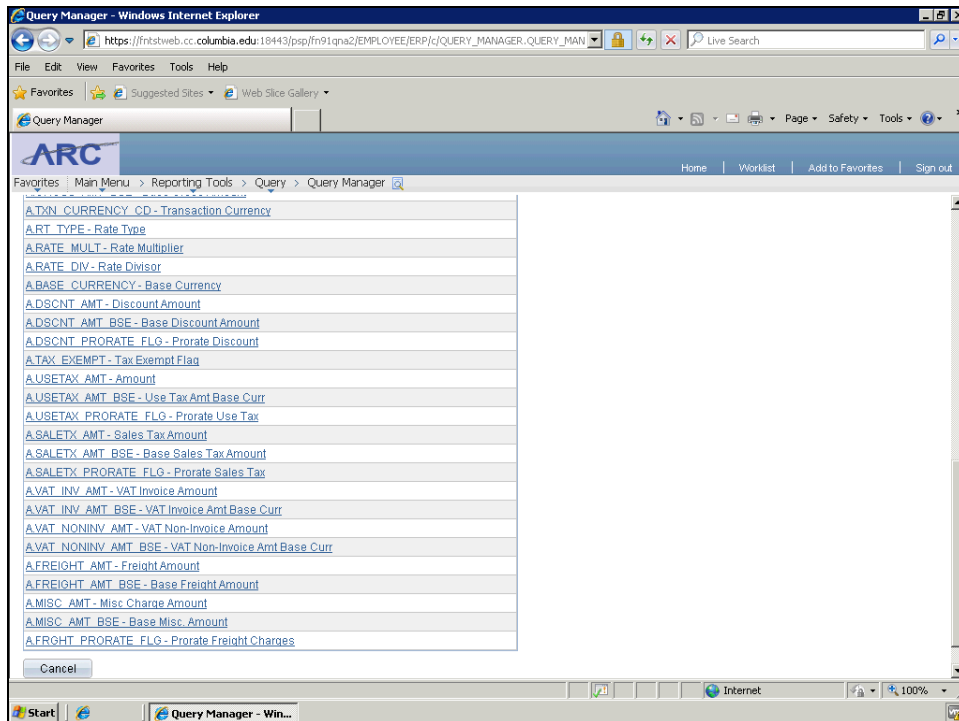
Step	Action
24.	Click the Add Criteria button. 



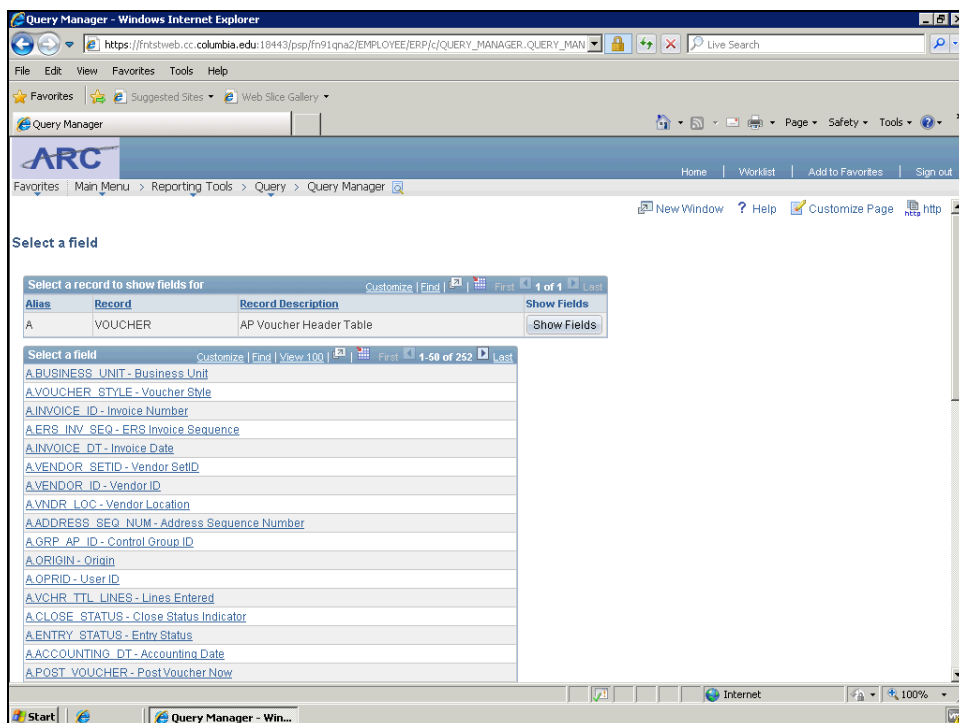
Step	Action
25.	Click the Select Record and Field button. 


Training Guide

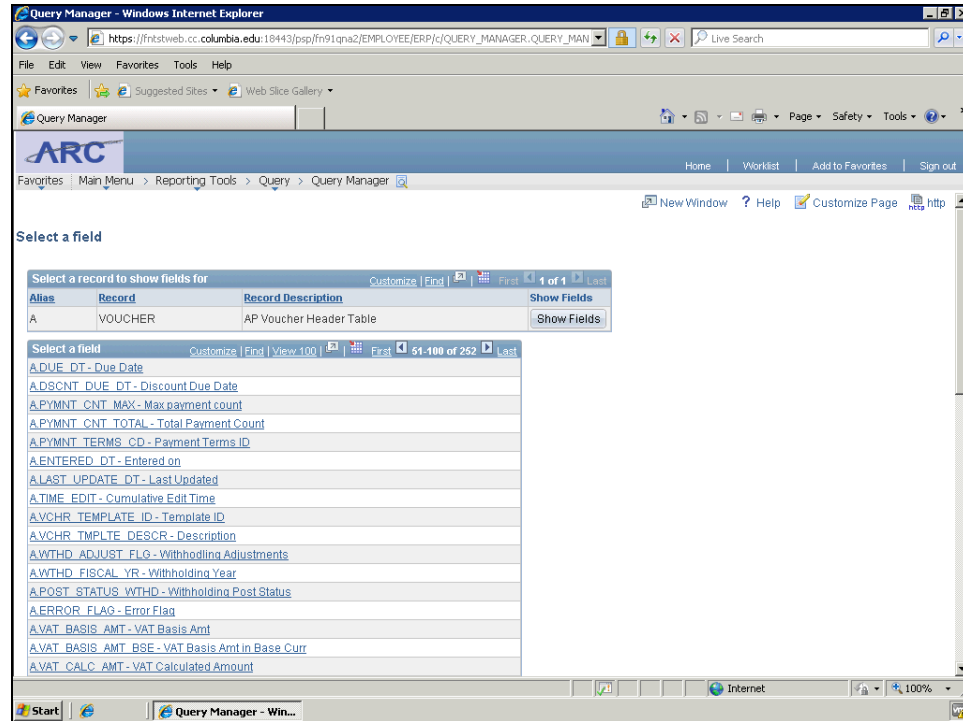
Advanced ARC Reporting



Step	Action
26.	Click the scrollbar.



Step	Action
27.	Click the Show next row (Alt+.) button. 



Step	Action
28.	Click the A.ENTRERED_DT - Entered on link. <u>A.ENTRERED_DT - Entered on</u>

Training Guide

Advanced ARC Reporting



Edit Criteria Properties

Choose Expression 1 Type

☒ Field
☐ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:
A. ENTERED_DT - Entered on

***Condition Type:** equal to

Choose Expression 2 Type

☐ Field
☐ Expression
☒ Constant
☐ Prompt
☐ Subquery

Expression 2

Define Constant

*Date: []

OK Cancel

Step	Action
29.	Click the Condition Type list. <div> <div>equal to</div> </div>

Edit Criteria Properties

Choose Expression 1 Type

☒ Field
☐ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:
A. ENTERED_DT - Entered on

***Condition Type:** equal to

Choose Expression 2 Type

☐ Field
☐ Expression
☒ Constant
☐ Prompt
☐ Subquery

Expression 2

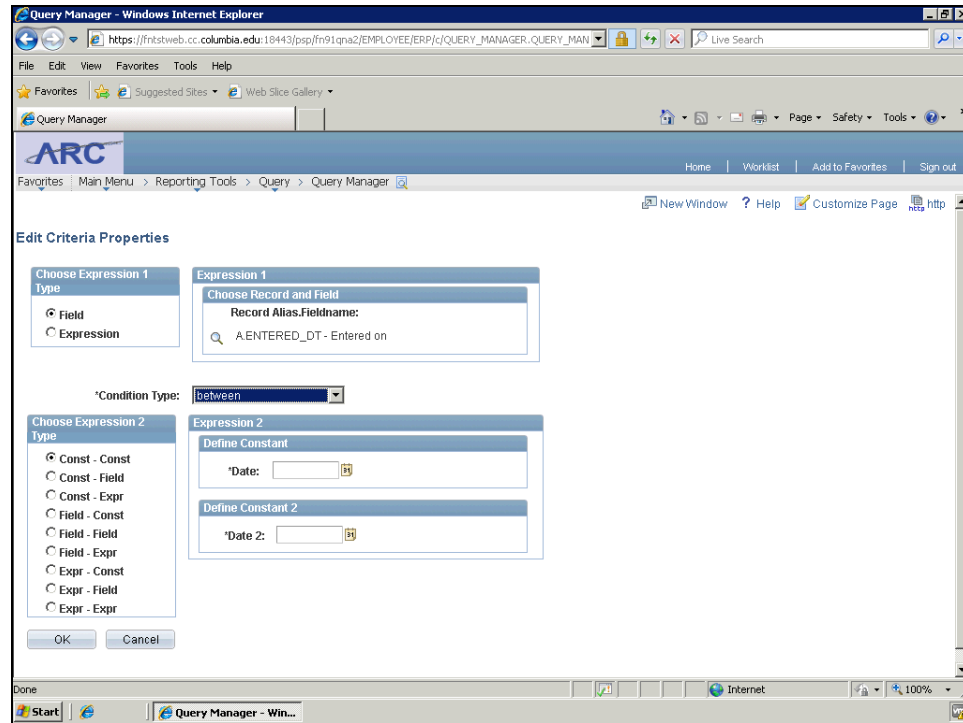
Define Constant

*Date: []

OK Cancel

between
does not exist
equal to
exists
greater than
in list
in tree
is not null
is null
less than
like
not between
not equal to
not greater than
not in list
not in tree
not less than
not like

Step	Action
30.	Click the between list item. <div>between</div>



Step	Action
31.	Click the Expr - Expr option. <div><input type="radio"/> Expr - Expr</div>

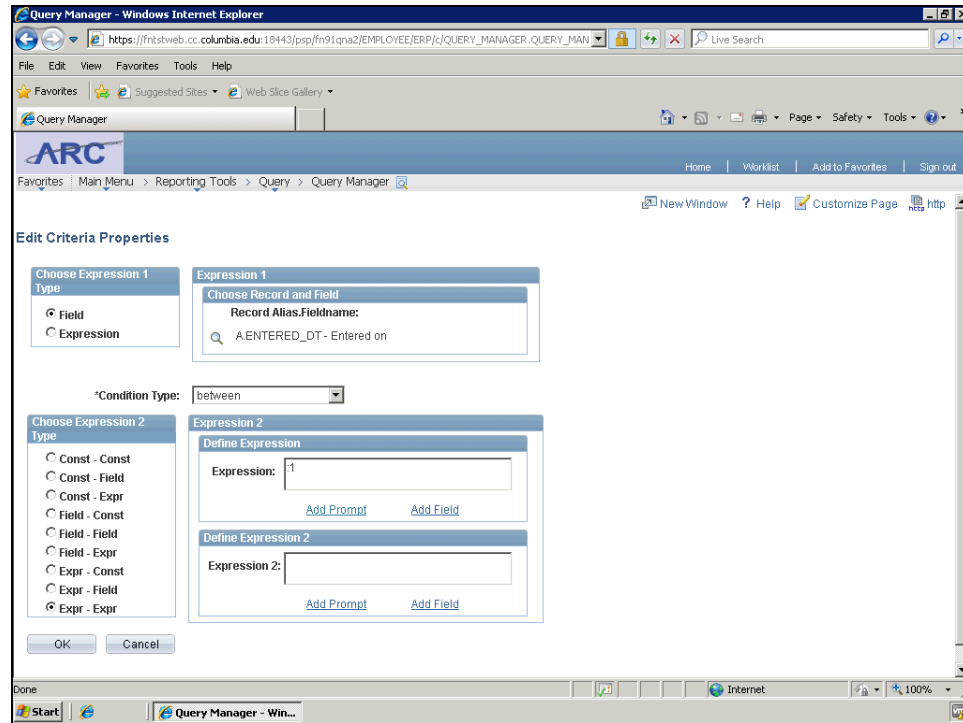
Training Guide

Advanced ARC Reporting



Step	Action
32.	Click the Add Prompt link. Add Prompt

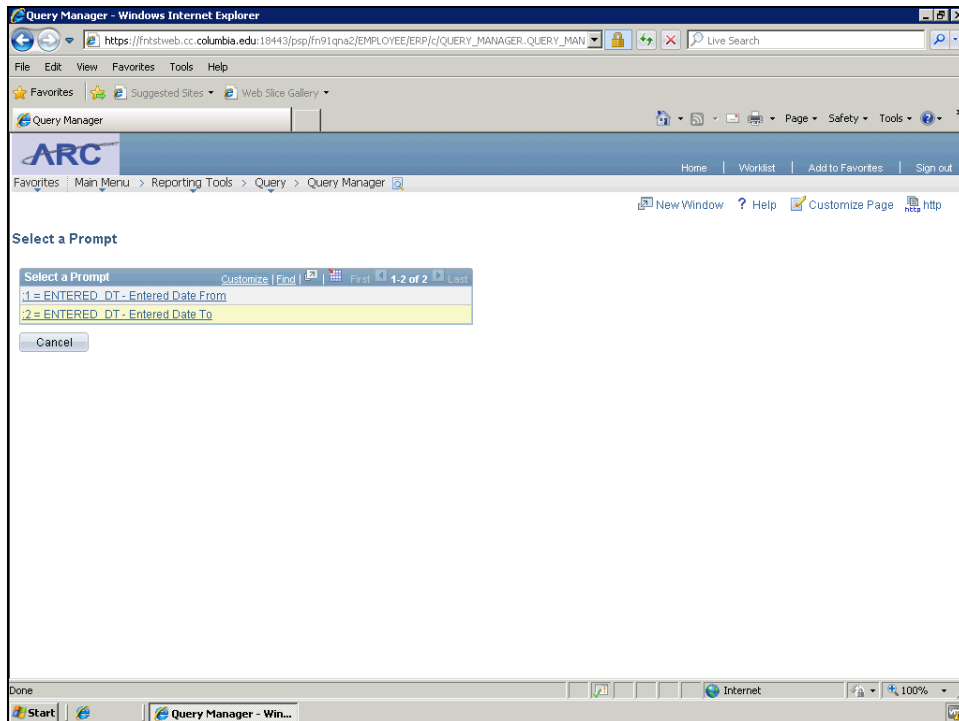
Step	Action
33.	Click the :1 = ENTERED_DT - Entered Date From link. :1 = ENTERED_DT - Entered Date From



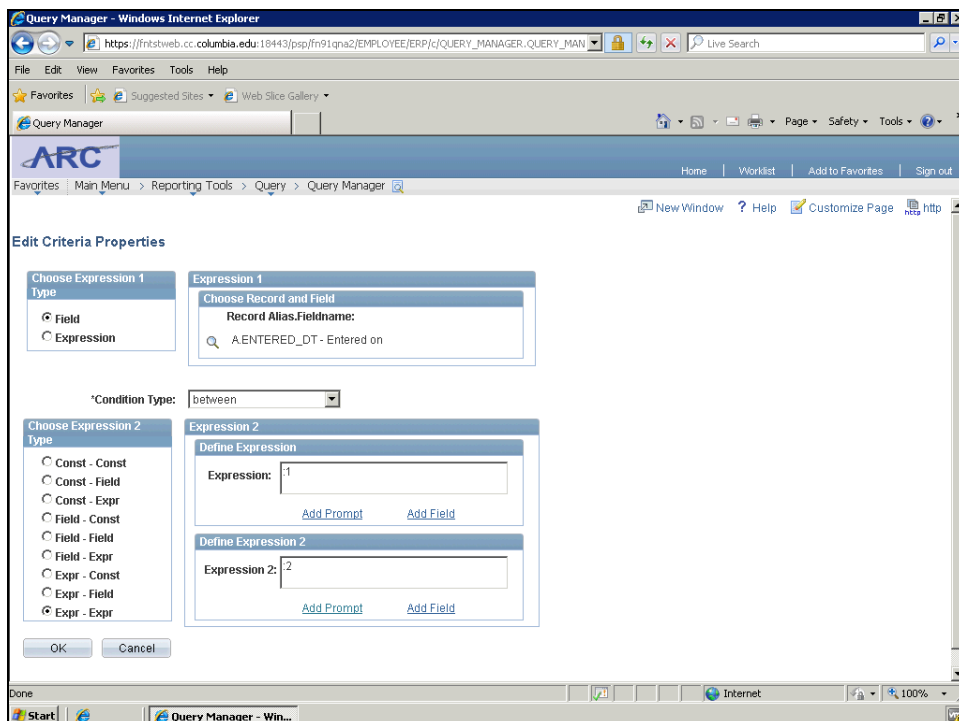
Step	Action
34.	Click the Add Prompt link. Add Prompt


Training Guide

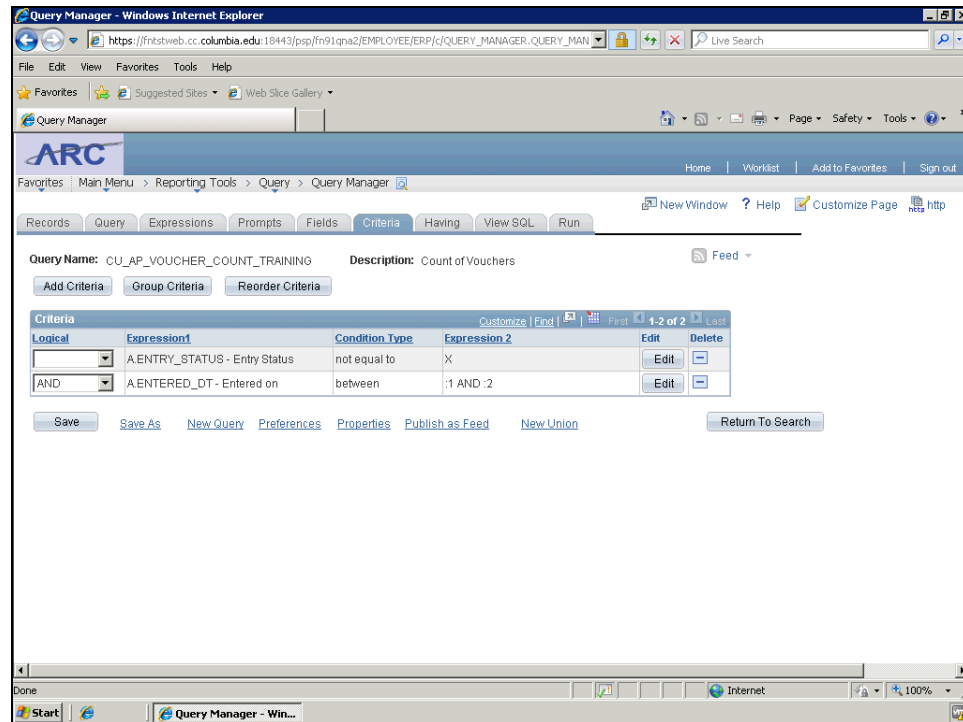
Advanced ARC Reporting




Step	Action
35.	Click the :2 = ENTERED_DT - Entered Date To link. <div style="border: 1px solid black; padding: 2px; display: inline-block;">:2 = ENTERED_DT - Entered Date To</div>



Step	Action
36.	Click the OK button. 




Step	Action
37.	Click the Run tab. 

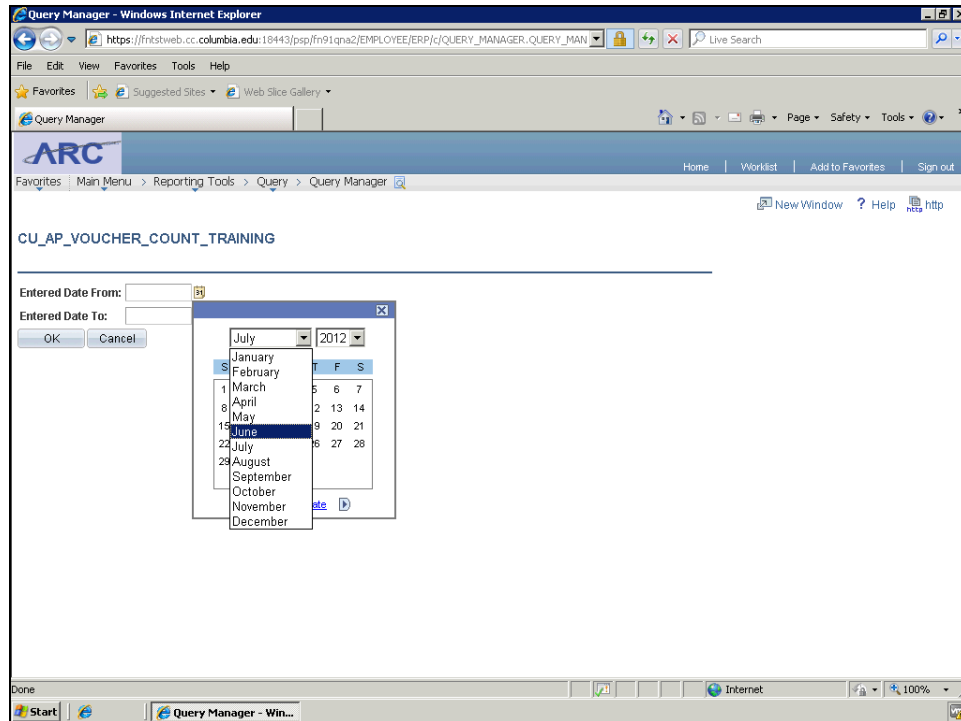
Training Guide

Advanced ARC Reporting



Step	Action
38.	Click the Choose a date (Alt+5) button. 

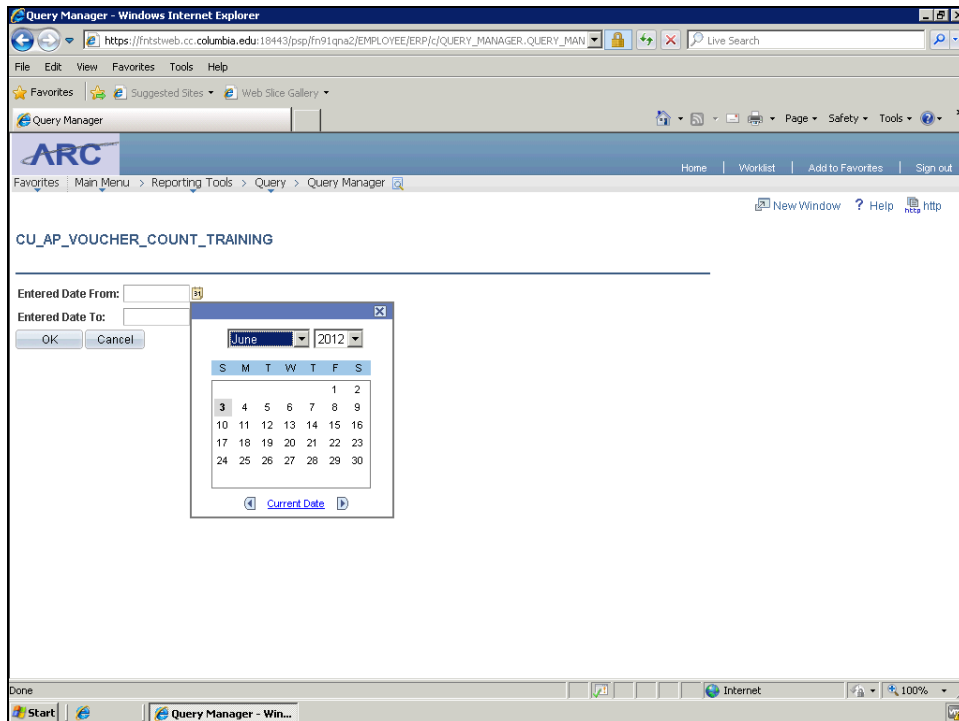
Step	Action
39.	Click the list. <div data-bbox="440 342 620 388" data-label="Form"> <input type="text" value="July"/> </div>



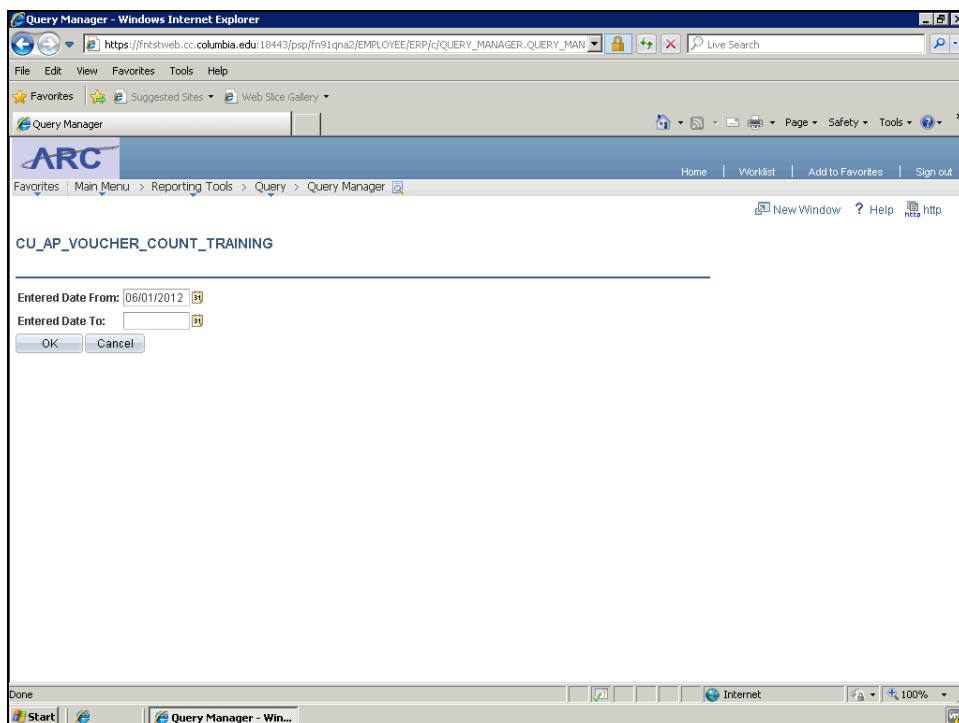
Step	Action
40.	Click the June list item. <div data-bbox="440 1304 617 1344" data-label="Form"> <input type="text" value="June"/> </div>

Training Guide

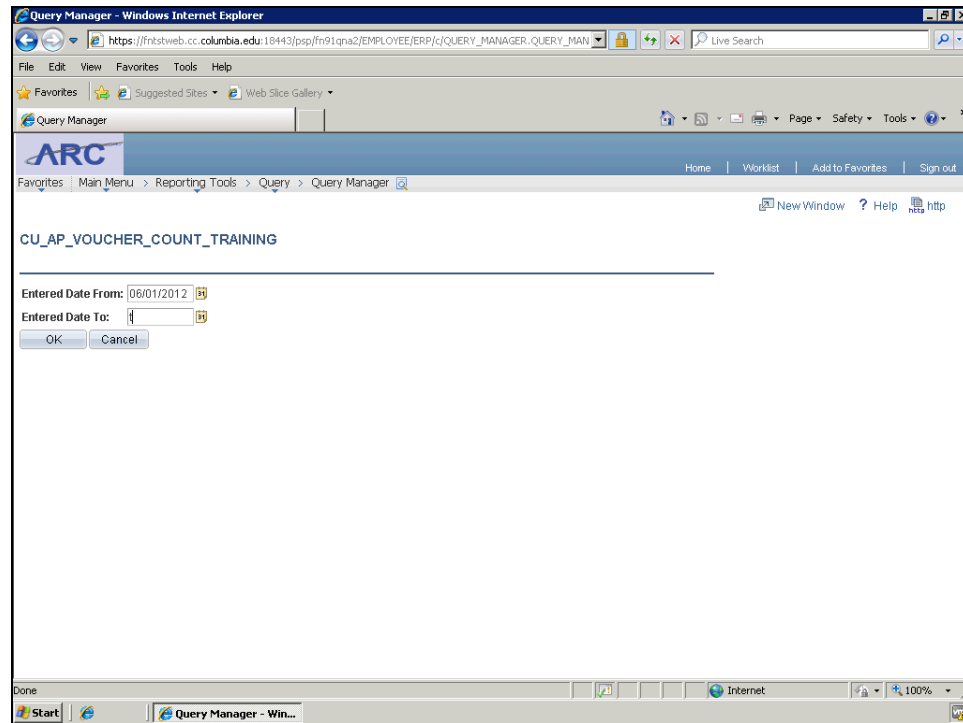
Advanced ARC Reporting



Step	Action
41.	Click the 1 link. 1



Step	Action
42.	Click in the Entered Date To field. <input data-bbox="440 342 583 382" type="text"/>



Step	Action
43.	Enter the desired information into the Entered Date To field. Enter "t".

Training Guide

Advanced ARC Reporting



Query Manager - Windows Internet Explorer

https://firstweb.cc.columbia.edu:18443/psp/m91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER_QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home Worklist Add to Favorites Sign out

Favorites Main Menu Reporting Tools Query Query Manager

New Window Help http

CU_AP_VOUCHER_COUNT_TRAINING

Entered Date From: 06/01/2012

Entered Date To:

OK Cancel

Ok (Enter)

Step	Action
44.	Click the OK button. <div>OK</div>

Query Manager - Windows Internet Explorer

https://firstweb.cc.columbia.edu:18443/psp/m91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER_QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home Worklist Add to Favorites Sign out

Favorites Main Menu Reporting Tools Query Query Manager

New Window Help Customize Page http


Records Query Expressions Prompts Fields Criteria Having View SQL Run

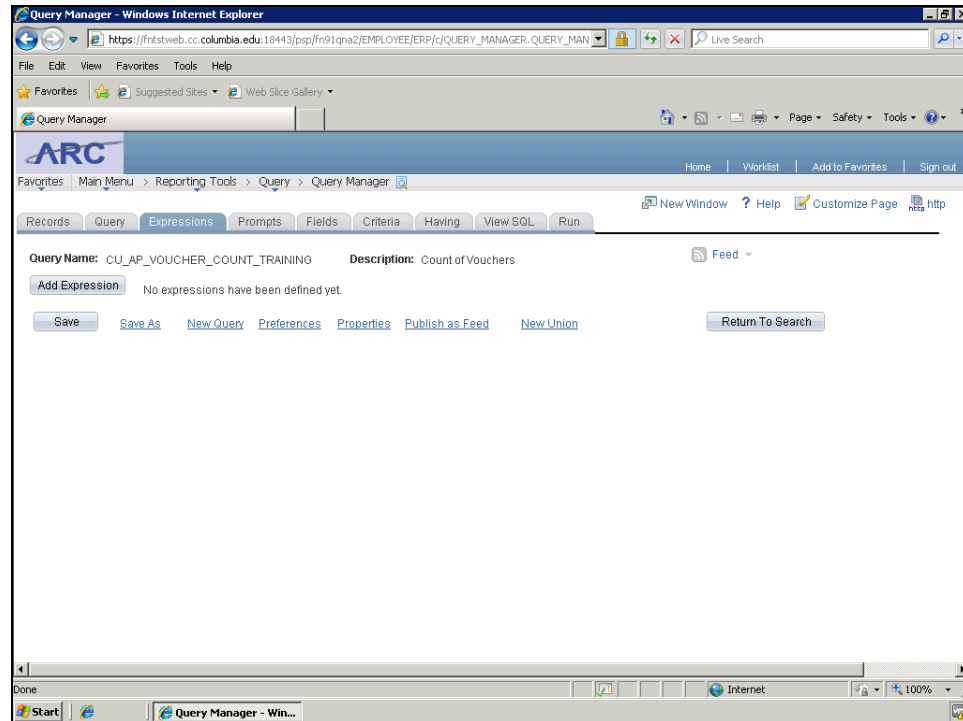
Entered Date From = 2012-06-01, Entered Date To = 2012-07-03

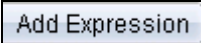
View All Rerun Query Download to Excel Download to XML

First 1-30 of 30 Last

	Entered Date	Entry Status	Count Voucher
1	07/03/2012	Postable	1
2	07/02/2012	Postable	21
3	07/01/2012	Postable	1
4	06/29/2012	Postable	56
5	06/28/2012	Postable	63
6	06/27/2012	Postable	1
7	06/26/2012	Postable	38
8	06/25/2012	Postable	47
9	06/24/2012	Postable	1
10	06/22/2012	Postable	8
11	06/21/2012	Postable	5
12	06/20/2012	Postable	3
13	06/19/2012	Postable	5
14	06/19/2012	Recycle	69
15	06/18/2012	Postable	69
16	06/18/2012	Recycle	1
17	06/15/2012	Postable	28

Step	Action
45.	Click the Expressions tab. 



Step	Action
46.	Click the Add Expression button. 

Training Guide

Advanced ARC Reporting



Query Manager - Windows Internet Explorer

https://fnstweb.cc.columbia.edu:18443/psp/fn91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home | Worklist | Add to Favorites | Sign out

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

New Window ? Help Customize Page http

Edit Expression Properties

*Expression Type: Character Length: 1

☐ Aggregate Function Decimals:

Expression Text:

[Add Prompt](#) [Add Field](#)

Done

Start Query Manager - Win...

Step	Action
47.	Click in the Expression Text field.

Query Manager - Windows Internet Explorer

https://fnstweb.cc.columbia.edu:18443/psp/fn91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home | Worklist | Add to Favorites | Sign out

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

New Window ? Help Customize Page http

Edit Expression Properties

*Expression Type: Character Length: 1

☐ Aggregate Function Decimals:

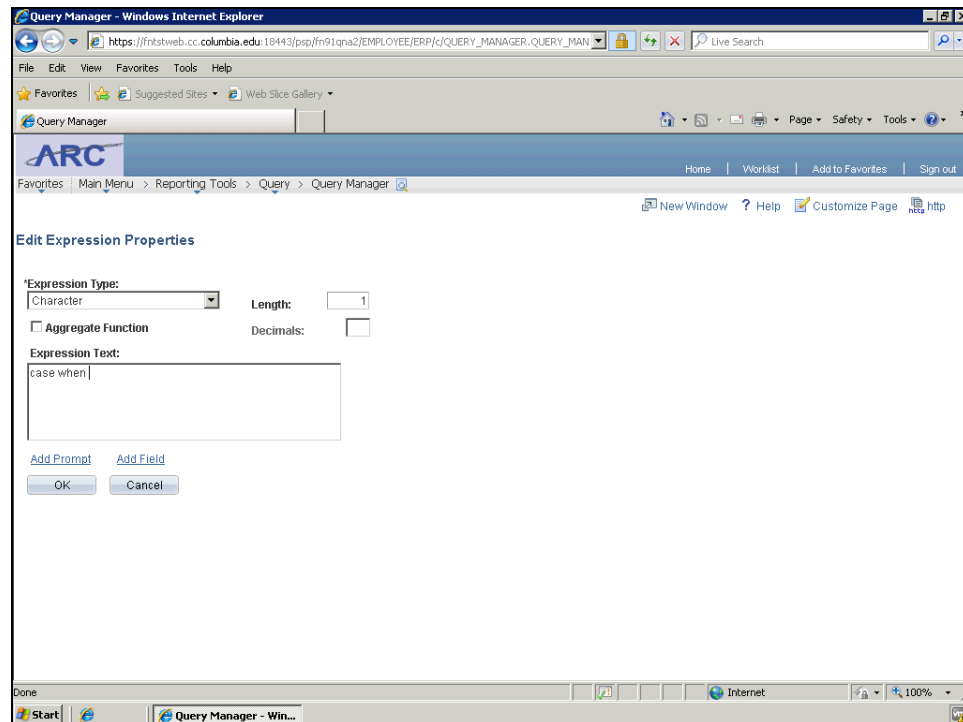
Expression Text:

[Add Prompt](#) [Add Field](#)

Done

Start Query Manager - Win...

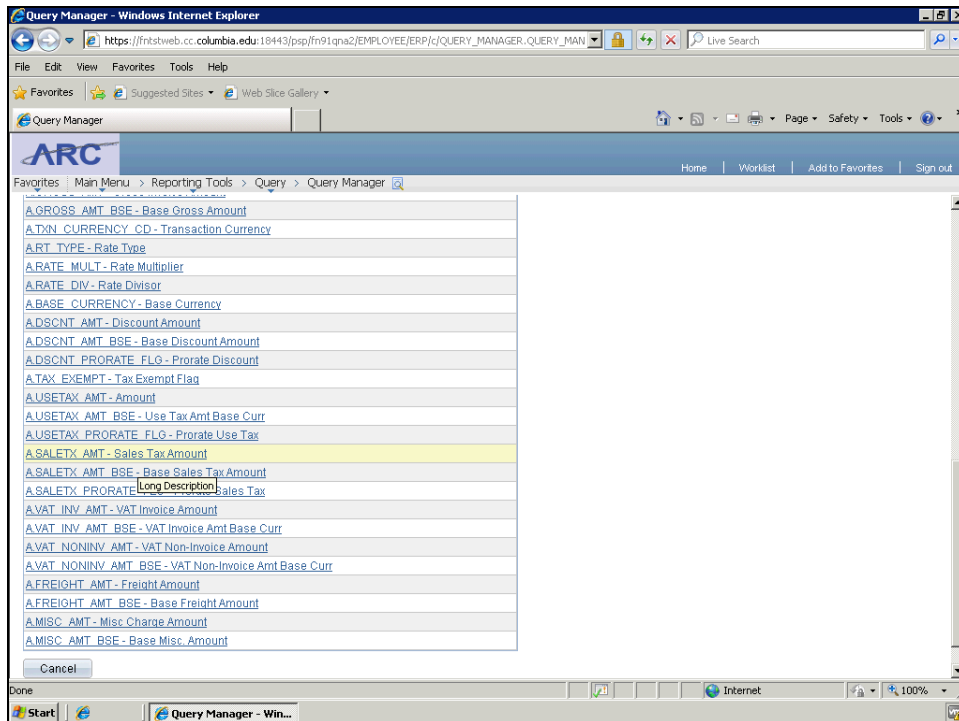
Step	Action
48.	Enter the desired information into the Expression Text field. Enter " case when ".



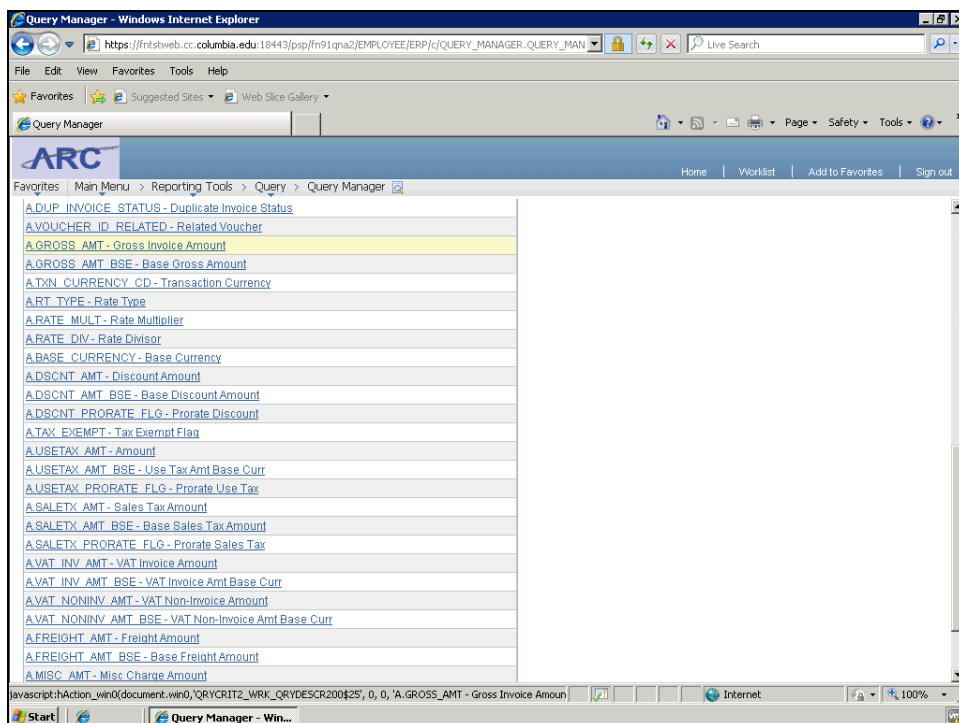
Step	Action
49.	Click the Add Field link. Add Field

Training Guide

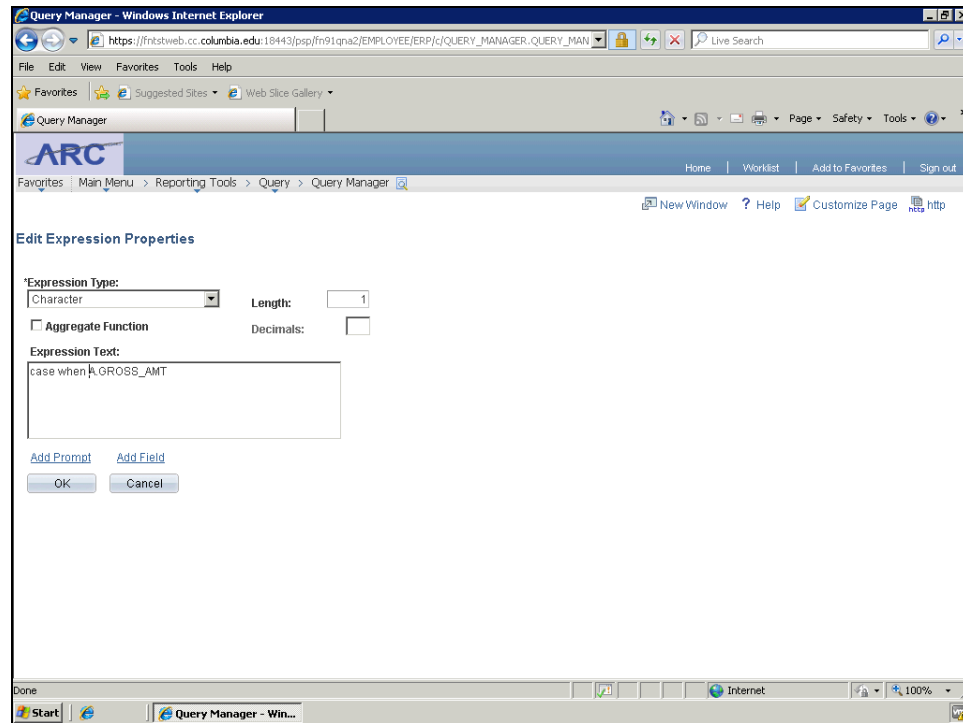
Advanced ARC Reporting



Step	Action
50.	Click the scrollbar.



Step	Action
51.	Click the A.GROSS_AMT - Gross Invoice Amount link. <u>A.GROSS_AMT - Gross Invoice Amount</u>



Step	Action
52.	Click in the Expression Text field.

Training Guide

Advanced ARC Reporting



Edit Expression Properties

'Expression Type':
 Character Length: 1
☐ Aggregate Function Decimals: 0

Expression Text:
 case when A.GROSS_AMT

Add Prompt Add Field
 OK Cancel

Step	Action
53.	Enter the desired information into the Expression Text field. Enter " <= 500 then '<= 500' else '> 500' end ".

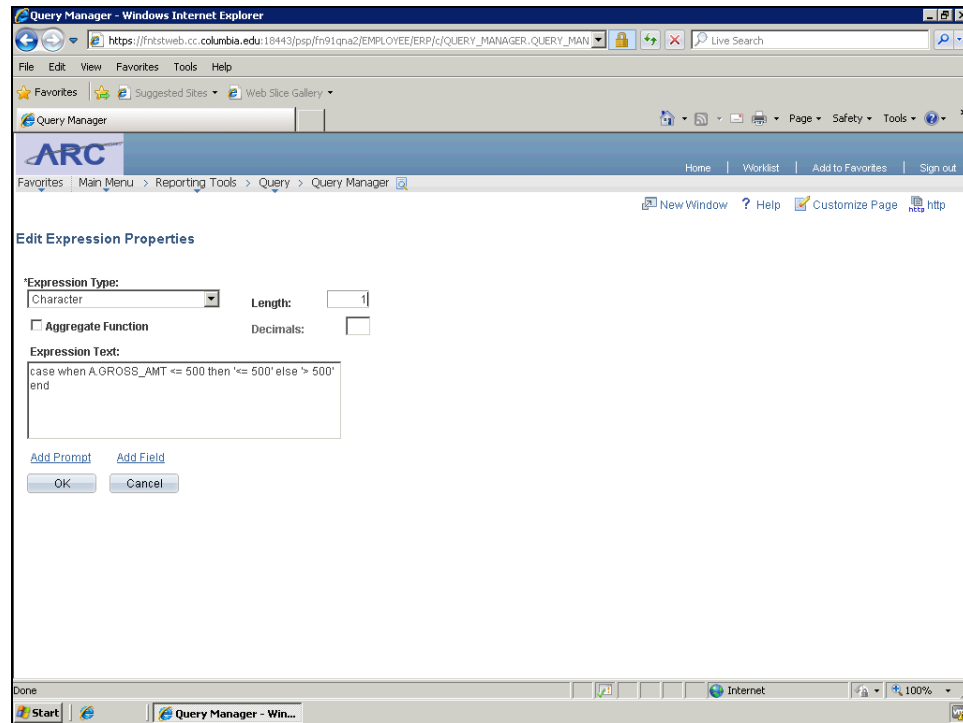
Edit Expression Properties

'Expression Type':
 Character Length: 1
☐ Aggregate Function Decimals: 0

Expression Text:
 case when A.GROSS_AMT <= 500 then '<= 500' else '> 500' end

Add Prompt Add Field
 OK Cancel

Step	Action
54.	Click in the Length field. <div style="border: 1px solid black; width: 50px; text-align: center; margin: 5px 0;">1</div>



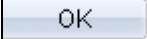
Step	Action
55.	Press [Backspace] .

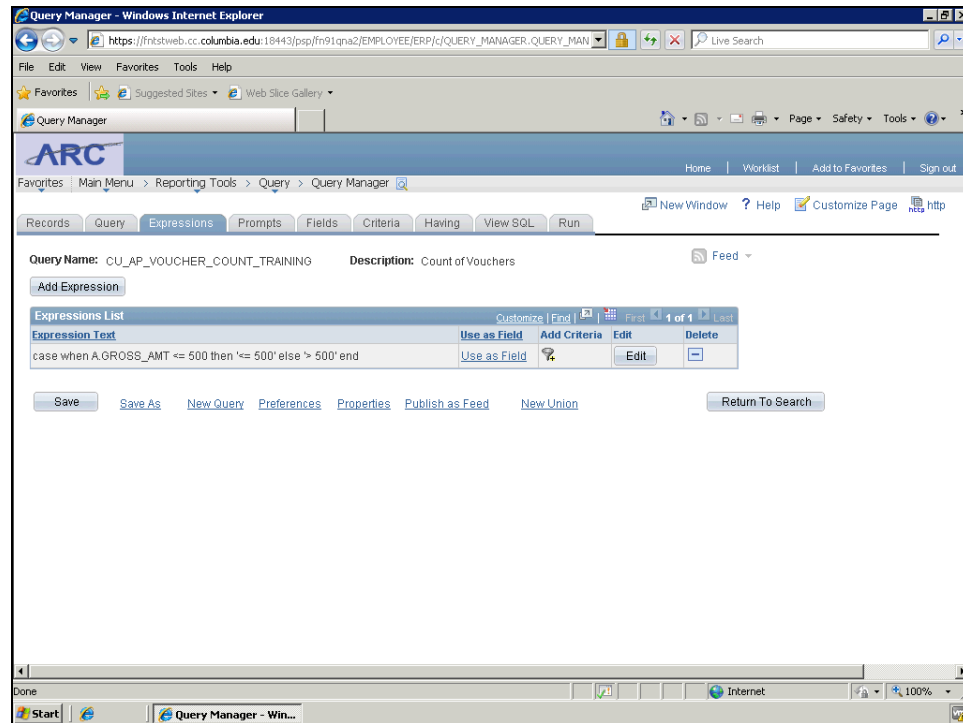
Training Guide


Advanced ARC Reporting



Step	Action
56.	Enter the desired information into the Length field. Enter "6".

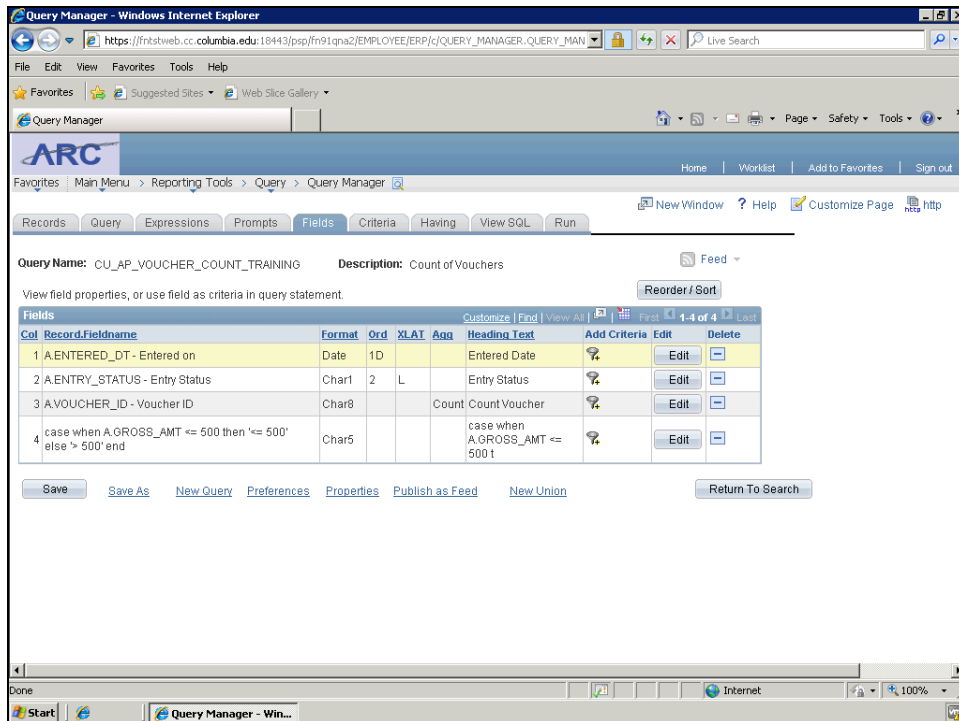
Step	Action
57.	Click the OK button. 



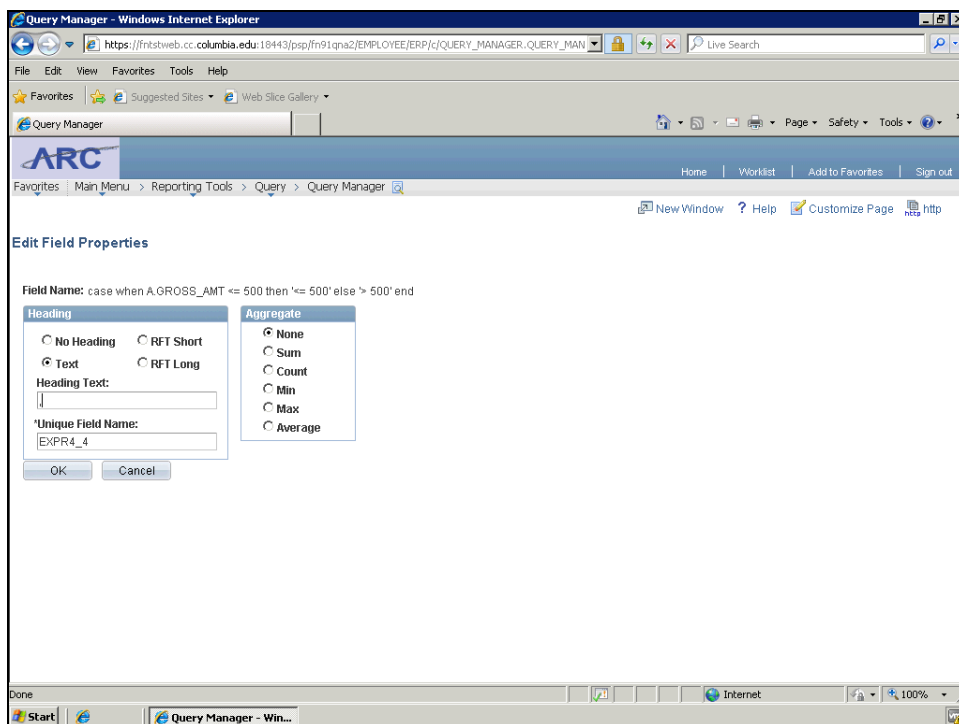
Step	Action
58.	Click the Use as Field link. 

Training Guide

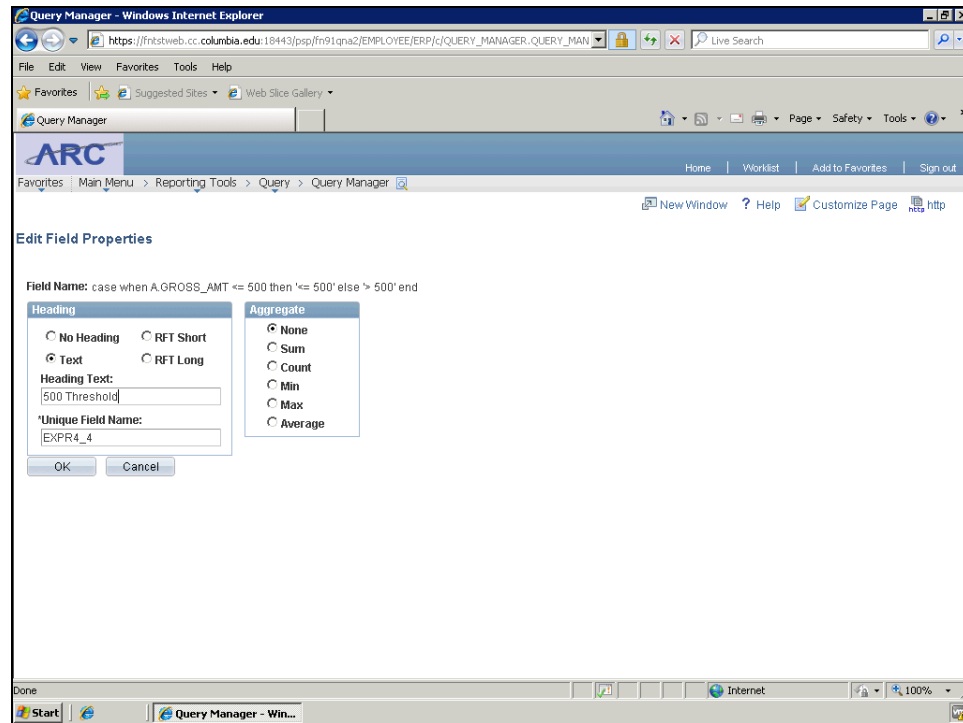
Advanced ARC Reporting




Step	Action
59.	Click the Edit button. <div>Edit</div>



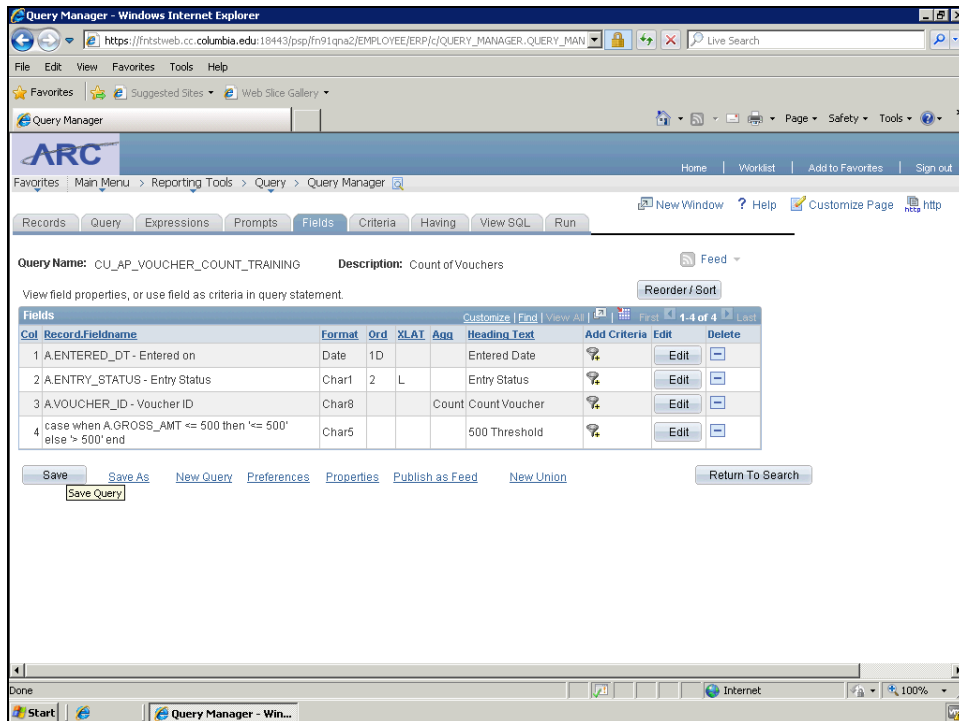
Step	Action
60.	Enter the desired information into the Heading Text field. Enter " 500 Threshold ".



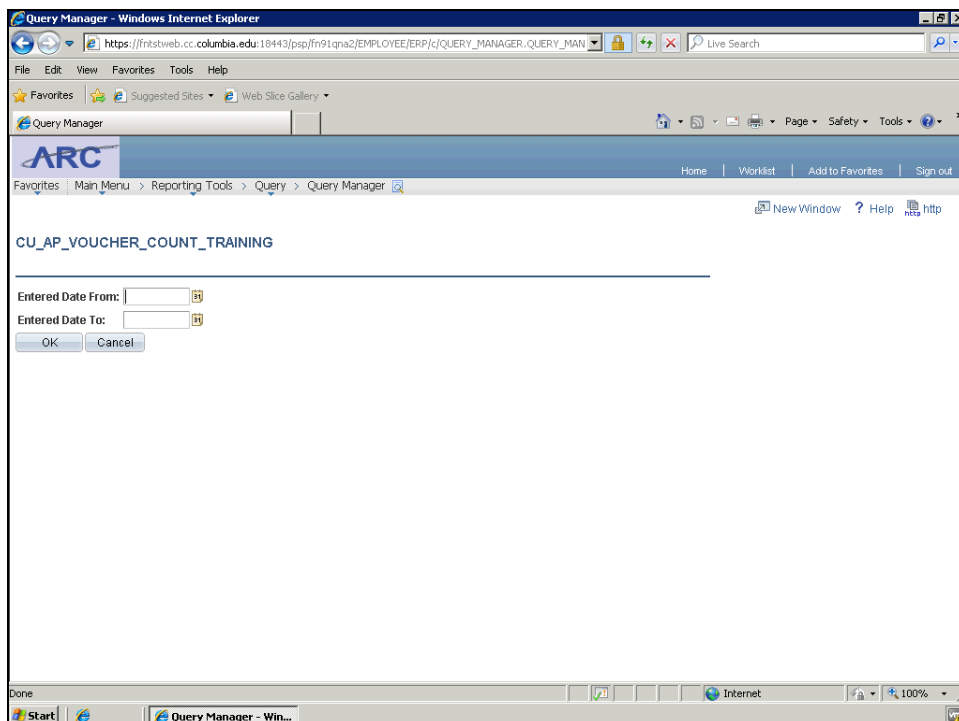
Step	Action
61.	Click the OK button. 


Training Guide

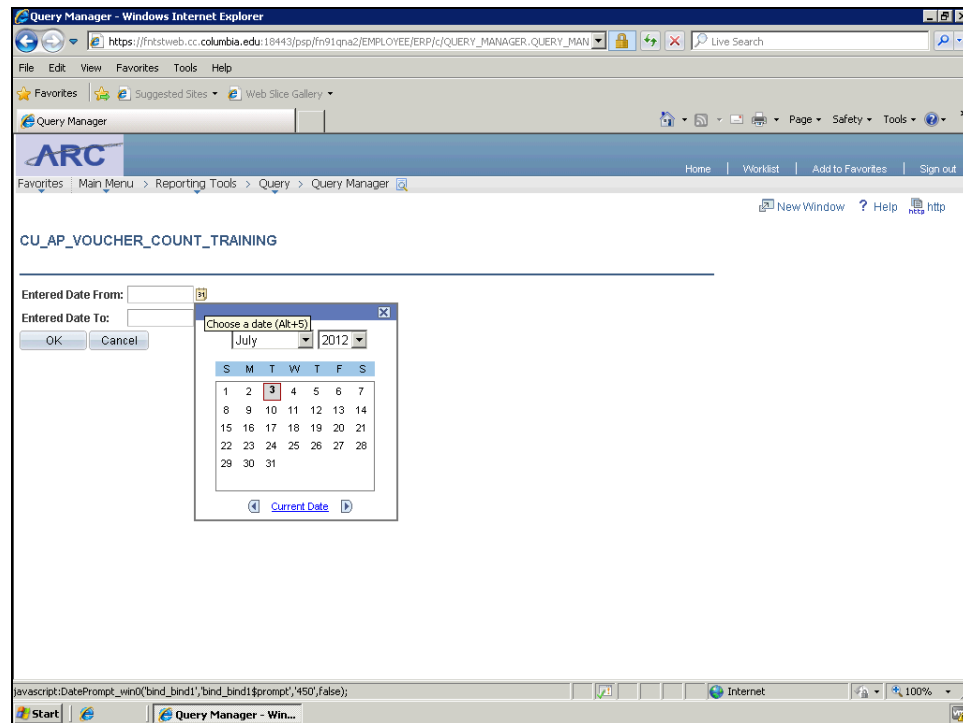
Advanced ARC Reporting




Step	Action
62.	Click the Run tab. <div>Run</div>



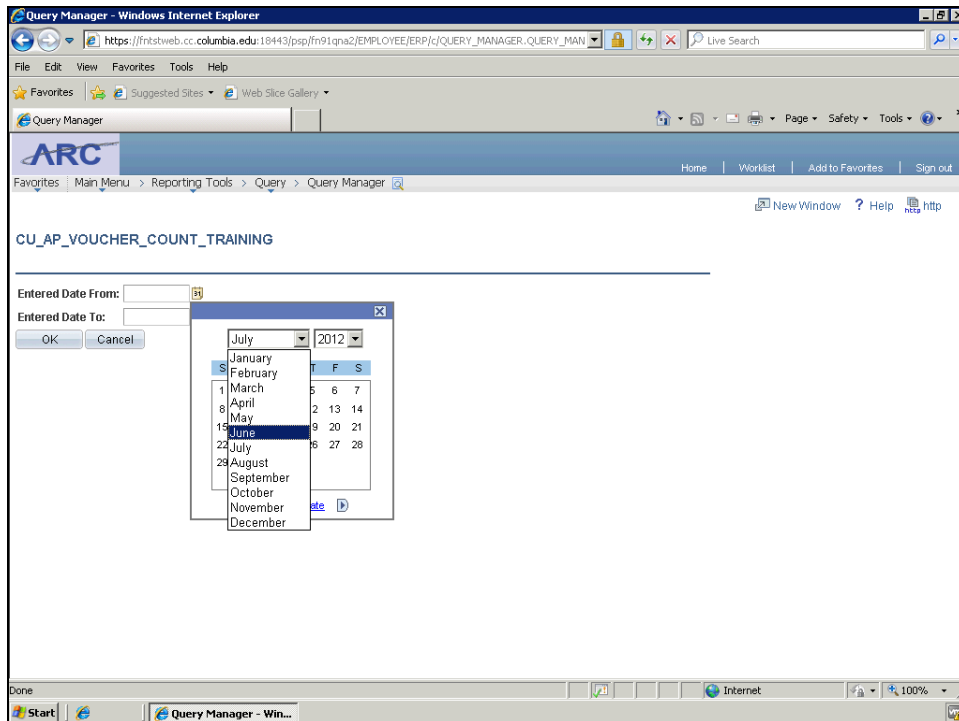
Step	Action
63.	Click the Choose a date (Alt+5) button. 




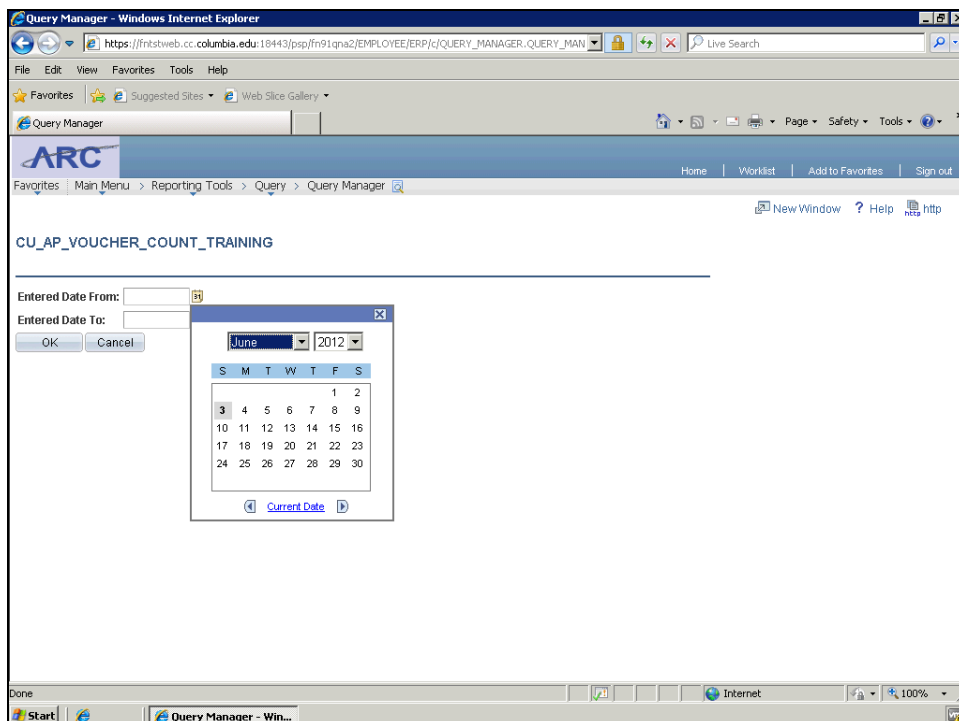
Step	Action
64.	Click the list. 

Training Guide

Advanced ARC Reporting



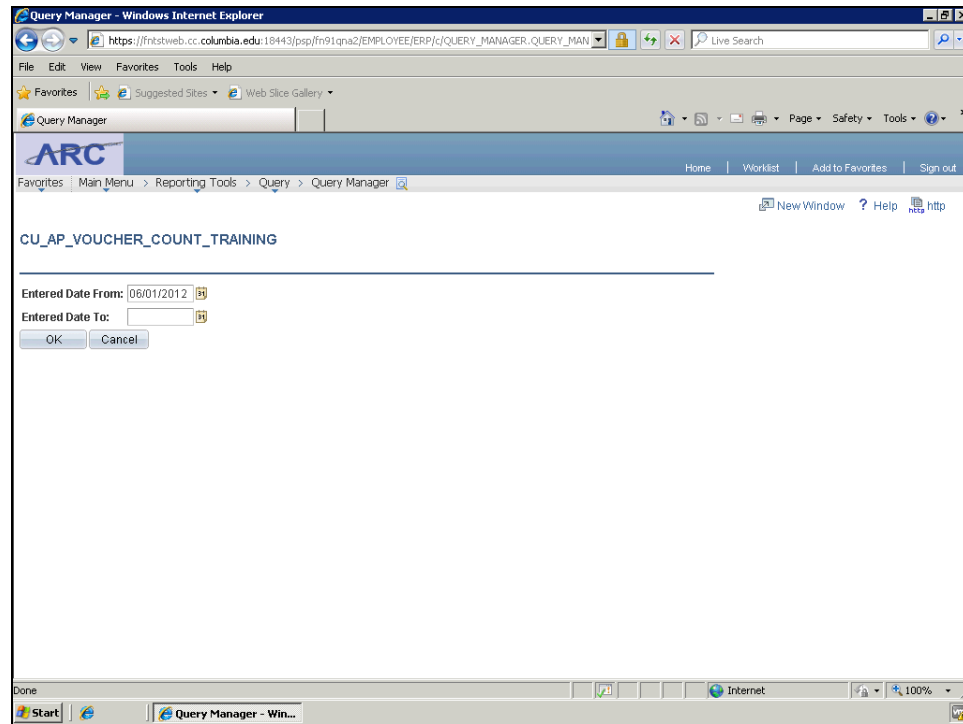
Step	Action
65.	Click the June list item. 





Training Guide Advanced ARC Reporting

Step	Action
66.	Click the 1 link. <div>1</div>



Step	Action
67.	Click in the Entered Date To field. <div></div>

Training Guide

Advanced ARC Reporting



Query Manager - Windows Internet Explorer

https://fnstweb.cc.columbia.edu:18443/psp/fn91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home | Worklist | Add to Favorites | Sign out

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

CU_AP_VOUCHER_COUNT_TRAINING

Entered Date From: 06/01/2012

Entered Date To: [Date Picker]

OK Cancel

Step	Action
68.	Enter the desired information into the Entered Date To field. Enter "t".

Query Manager - Windows Internet Explorer

https://fnstweb.cc.columbia.edu:18443/psp/fn91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home | Worklist | Add to Favorites | Sign out

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

CU_AP_VOUCHER_COUNT_TRAINING

Entered Date From: 06/01/2012

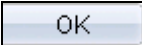
Entered Date To: t

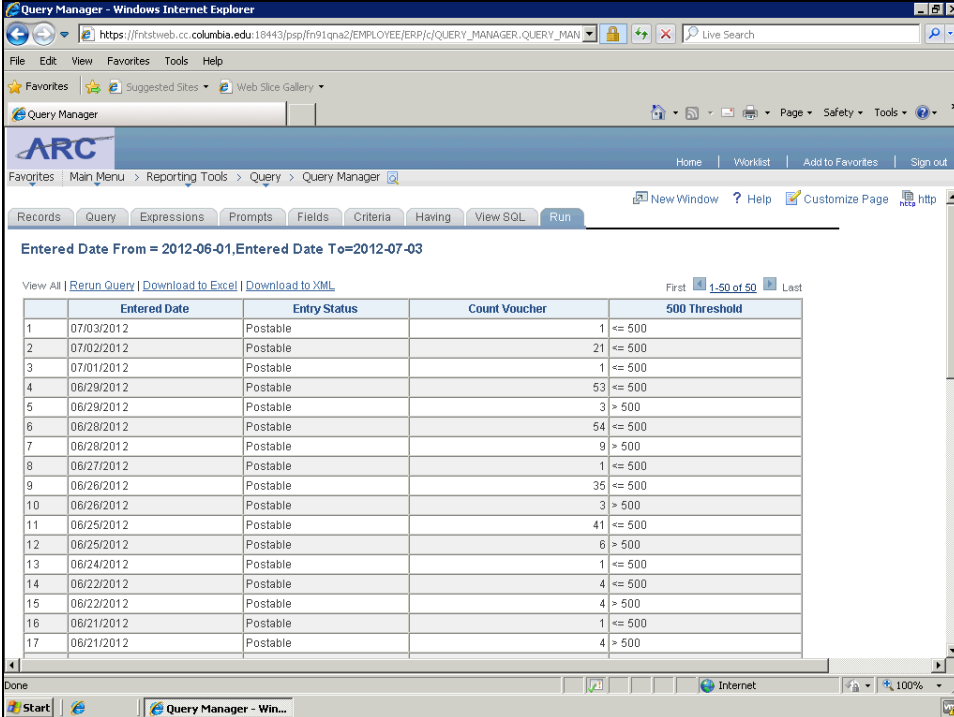
OK Cancel

Ok (Enter)



Training Guide Advanced ARC Reporting

Step	Action
69.	Click the OK button. 



Query Manager - Windows Internet Explorer

https://fnstweb.cc.columbia.edu:18443/psp/fn91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER.QUERY_MAN...

File Edit View Favorites Tools Help

ARC

Home | Worklist | Add to Favorites | Sign out

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

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Entered Date From = 2012-06-01, Entered Date To=2012-07-03

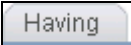
View All | Rerun Query | Download to Excel | Download to XML

First 1-50 of 50 Last

	Entered Date	Entry Status	Count Voucher	500 Threshold
1	07/03/2012	Postable	1	<= 500
2	07/02/2012	Postable	21	<= 500
3	07/01/2012	Postable	1	<= 500
4	06/29/2012	Postable	53	<= 500
5	06/29/2012	Postable	3	> 500
6	06/28/2012	Postable	54	<= 500
7	06/28/2012	Postable	9	> 500
8	06/27/2012	Postable	1	<= 500
9	06/26/2012	Postable	35	<= 500
10	06/26/2012	Postable	3	> 500
11	06/25/2012	Postable	41	<= 500
12	06/25/2012	Postable	6	> 500
13	06/24/2012	Postable	1	<= 500
14	06/22/2012	Postable	4	<= 500
15	06/22/2012	Postable	4	> 500
16	06/21/2012	Postable	1	<= 500
17	06/21/2012	Postable	4	> 500

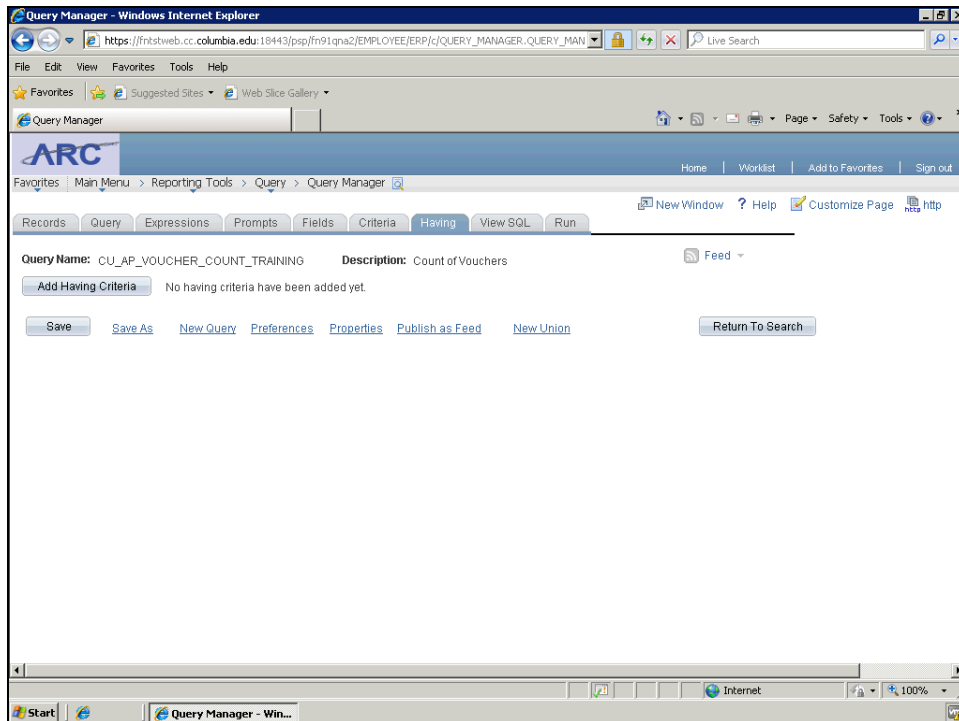
Done

Start Query Manager - Win...

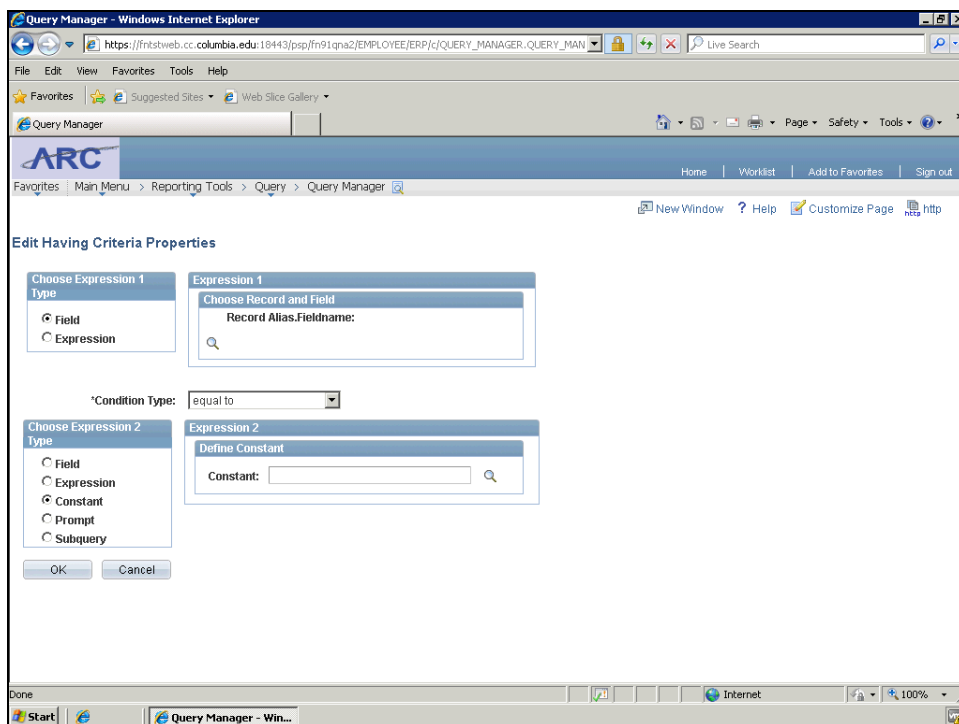
Step	Action
70.	Click the Having tab. 


Training Guide

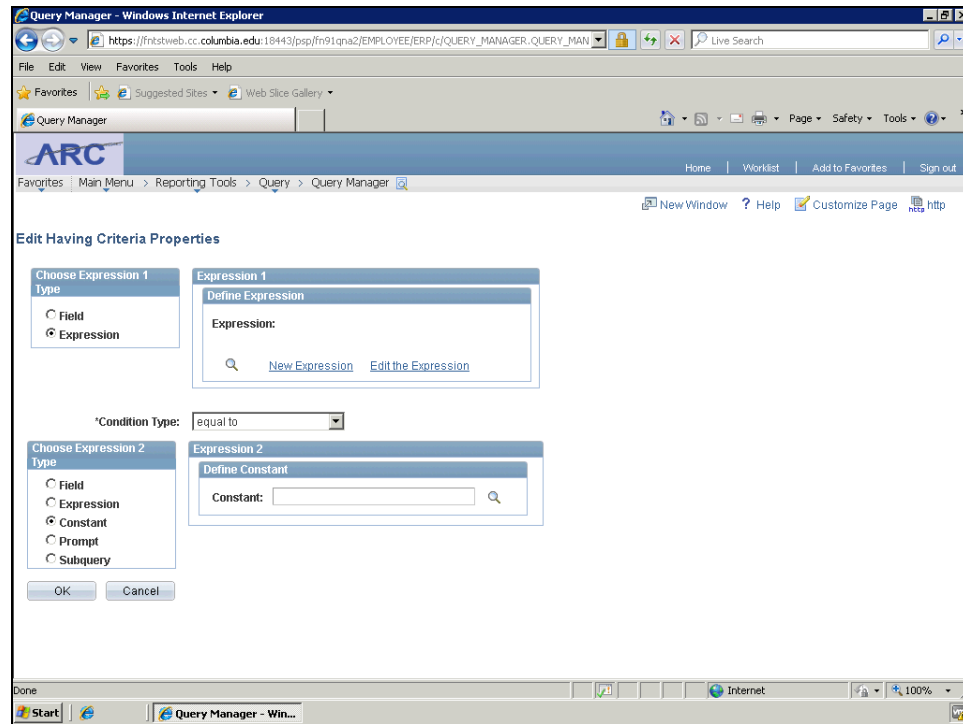
Advanced ARC Reporting




Step	Action
71.	Click the Add Having Criteria button. <div style="border: 1px solid black; padding: 2px; display: inline-block;">Add Having Criteria</div>



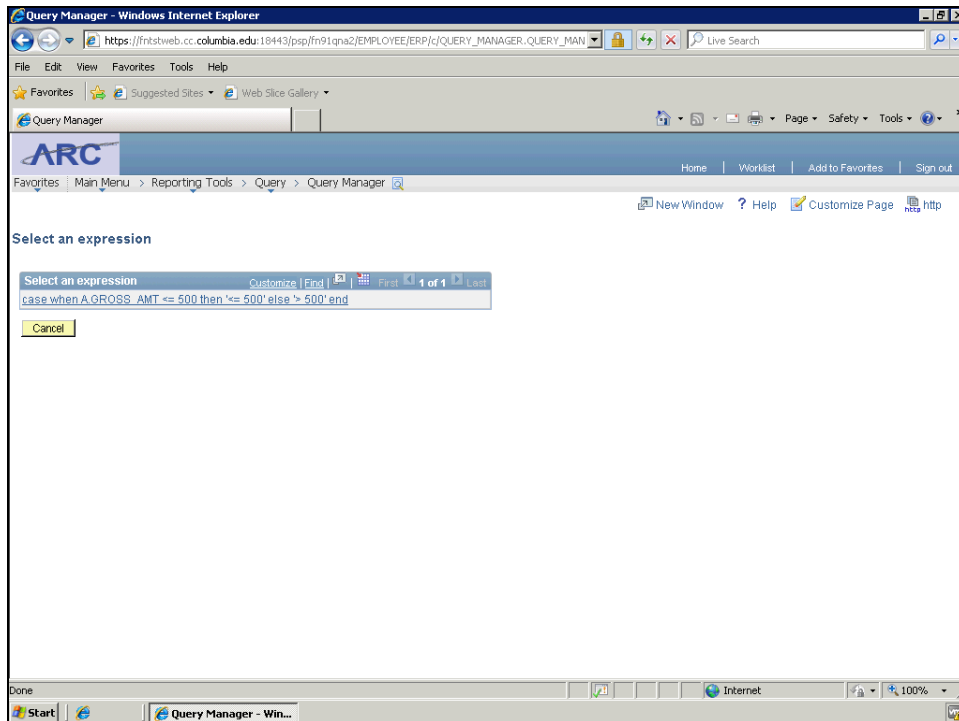
Step	Action
72.	Click the Expression option. 



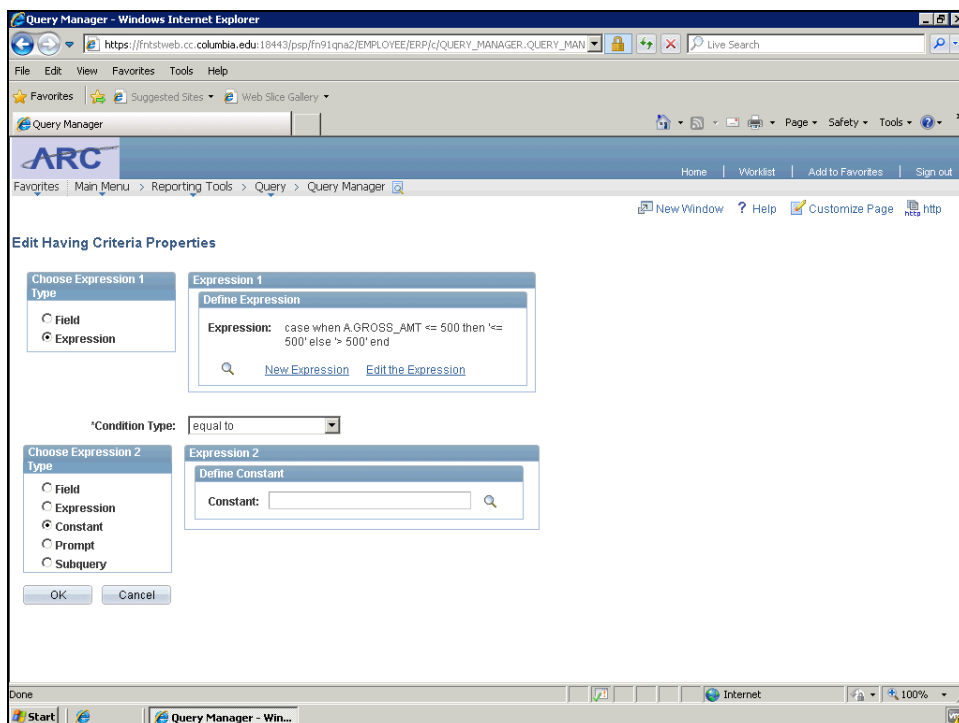
Step	Action
73.	Click the Select Expression button. 


Training Guide

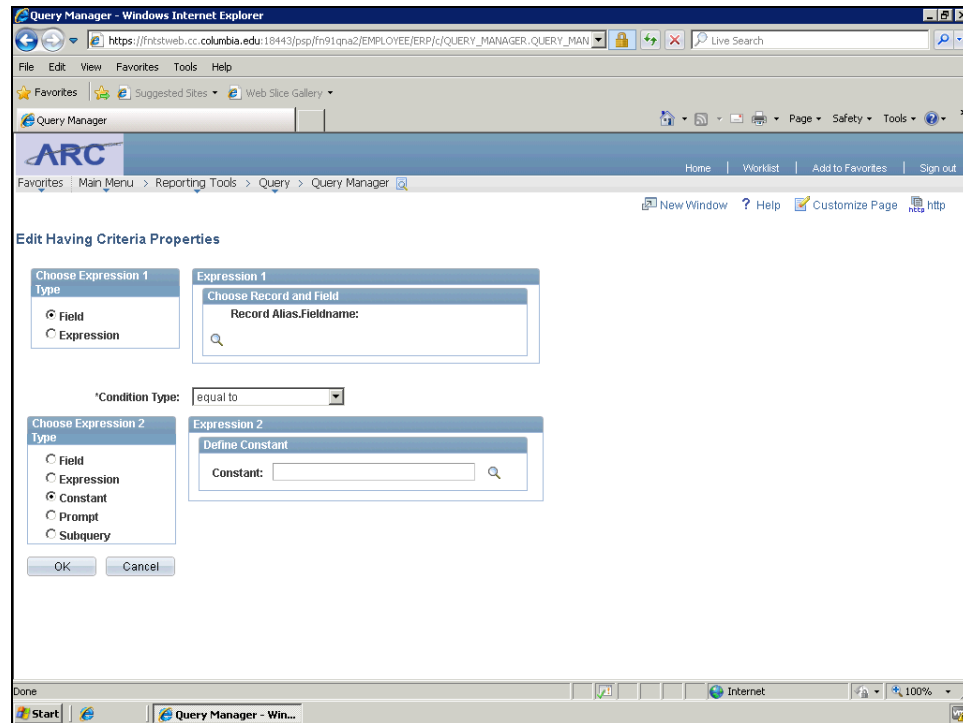
Advanced ARC Reporting




Step	Action
74.	Click the case when A.GROSS_AMT <= 500 then '<= 500' else '> 500' end link.



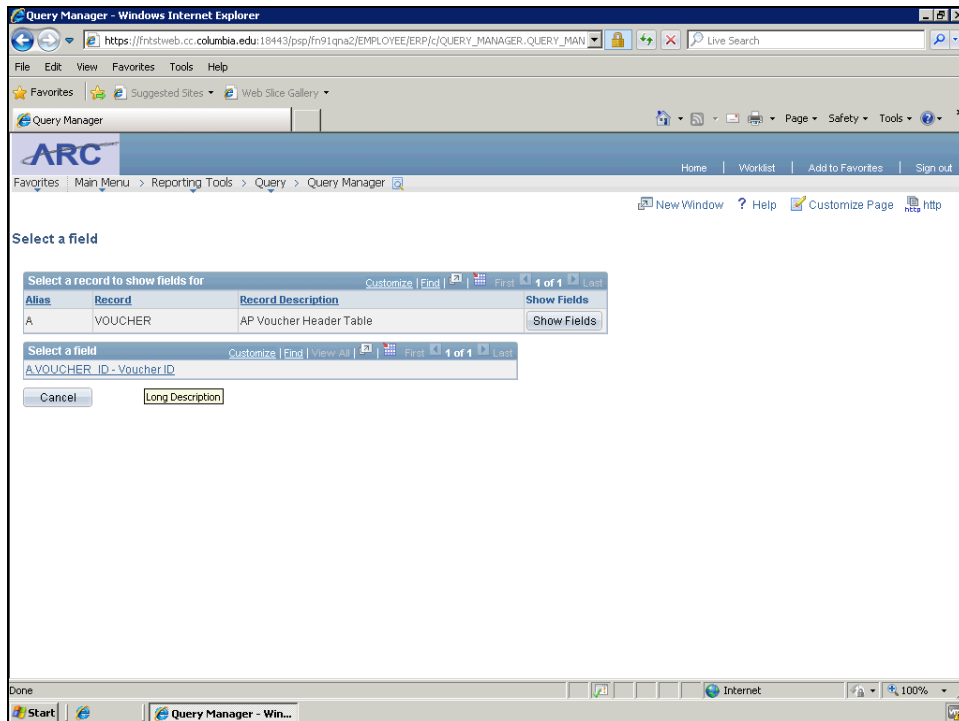
Step	Action
75.	Click the Field option. 



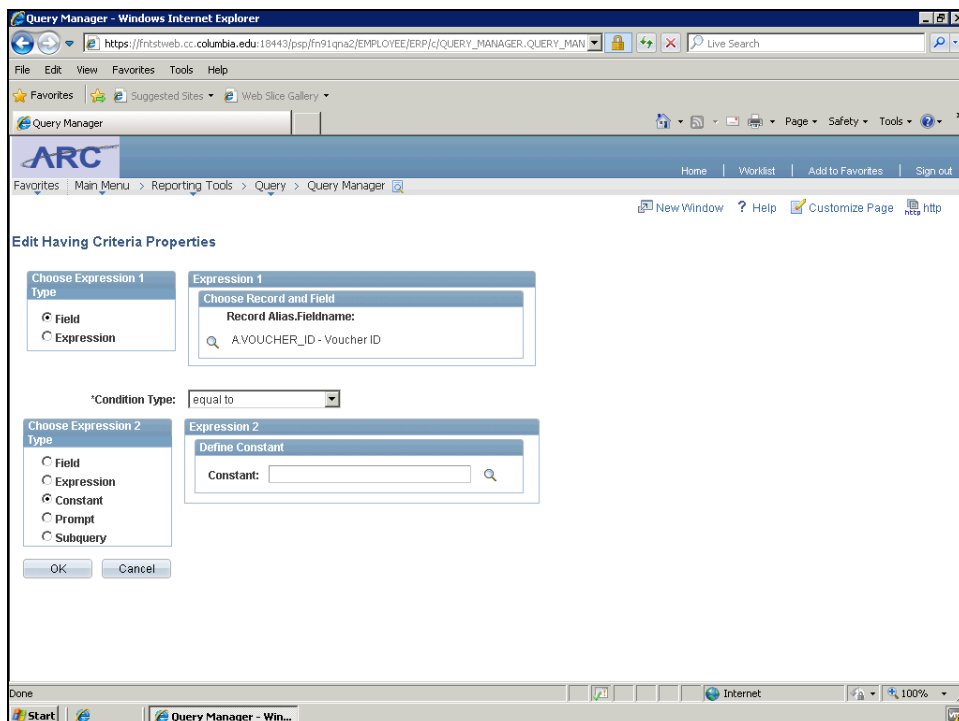
Step	Action
76.	Click the Select Record and Field button. 

Training Guide

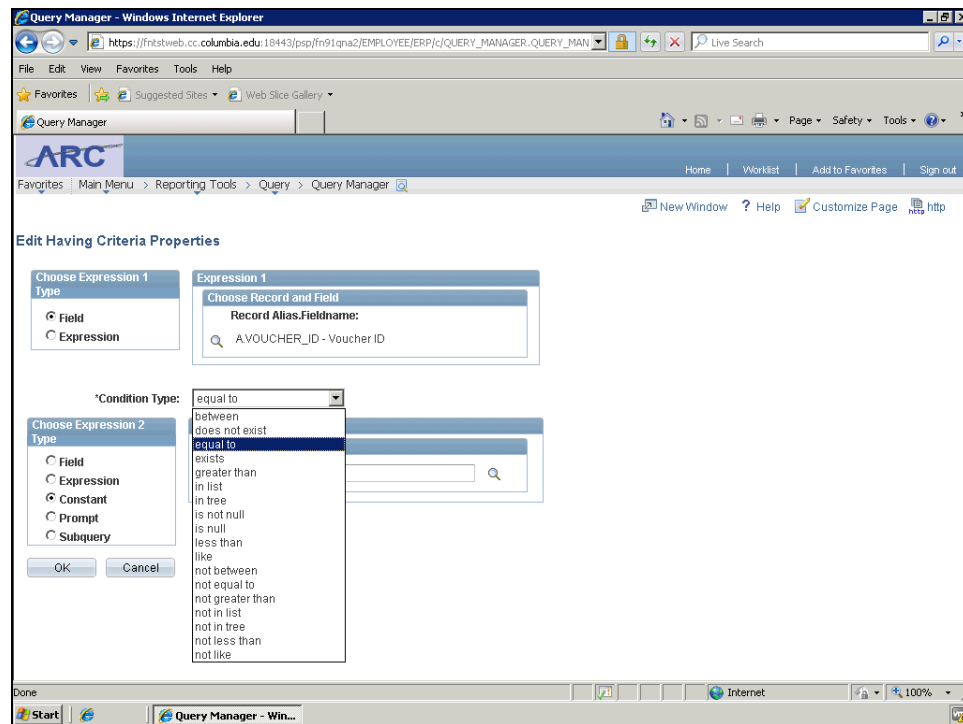
Advanced ARC Reporting



Step	Action
77.	Click the A.VOUCHER_ID - Voucher ID link. <u>A.VOUCHER_ID - Voucher ID</u>



Step	Action
78.	Click the Condition Type list. <div> <input type="text" value="equal to"/> </div>



Step	Action
79.	Click the greater than list item. <div> <input type="text" value="greater than"/> </div>

Training Guide

Advanced ARC Reporting



Query Manager - Windows Internet Explorer

https://fnstweb.cc.columbia.edu:18443/psp/fn91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER_QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

Home Worklist Add to Favorites Sign out

New Window ? Help Customize Page http

Edit Having Criteria Properties

Choose Expression 1 Type

Field ☒ Expression ☐

Expression 1

Choose Record and Field

Record Alias.FieldName:

AVOUCHER_ID - Voucher ID

*Condition Type:

greater than

between

does not exist

equal to

exists

greater than

in list

in tree

is not null

is null

less than

like

not between

not equal to

not greater than

not in list

not in tree

not less than

not like

OK Cancel

Step	Action
80.	Click the Constant option. <input checked="" type="radio"/> Constant

Query Manager - Windows Internet Explorer

https://fnstweb.cc.columbia.edu:18443/psp/fn91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER_QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

Home Worklist Add to Favorites Sign out

New Window ? Help Customize Page http

Edit Having Criteria Properties

Choose Expression 1 Type

Field ☒ Expression ☐

Expression 1

Choose Record and Field

Record Alias.FieldName:

AVOUCHER_ID - Voucher ID

*Condition Type:

greater than

between

does not exist

equal to

exists

greater than

in list

in tree

is not null

is null

less than

like

not between

not equal to

not greater than

not in list

not in tree

not less than

not like

OK Cancel

Choose Expression 2 Type

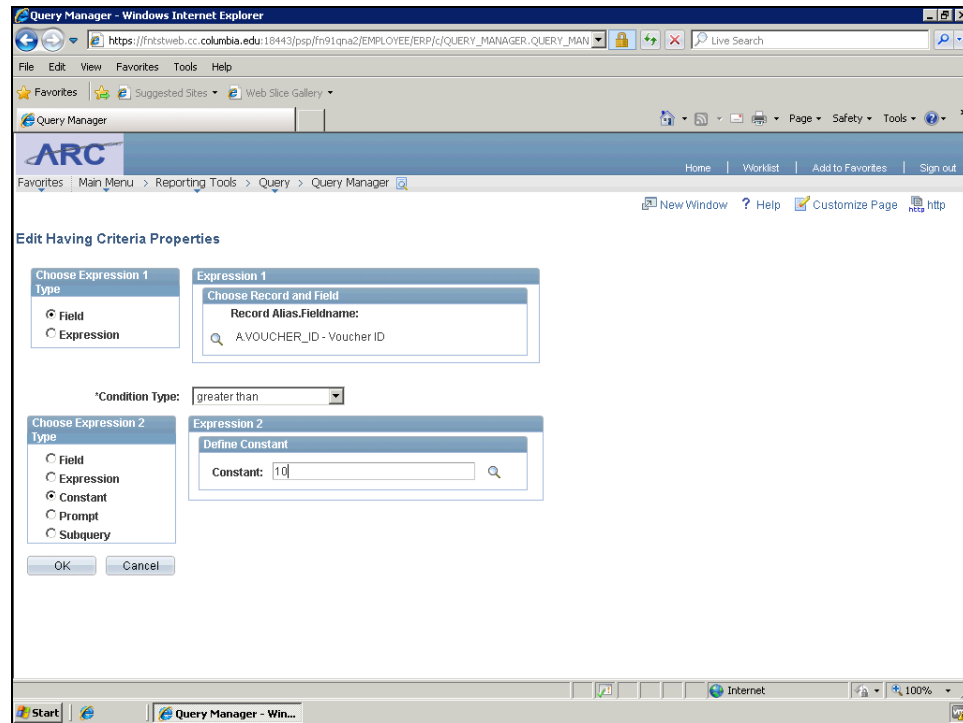
Field ☐ Expression ☐ Constant ☒ Prompt ☐ Subquery ☐

Expression 2

Define Constant

Constant:

Step	Action
81.	Click in the Constant field. <div style="border: 1px solid black; height: 20px; width: 250px; margin-top: 5px;"></div>



Step	Action
82.	Enter the desired information into the Constant field. Enter " 10 ".

Training Guide

Advanced ARC Reporting



Edit Having Criteria Properties

Choose Expression 1 Type: ☒ Field ☐ Expression

Expression 1: Choose Record and Field
Record Alias.FieldName: A.VOUCHER_ID - Voucher ID

*Condition Type: greater than

Choose Expression 2 Type: ☐ Field ☐ Expression ☒ Constant ☐ Prompt ☐ Subquery

Expression 2: Define Constant
Constant: 10

OK Cancel

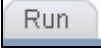
Step	Action
83.	Click the OK button. <div>OK</div>

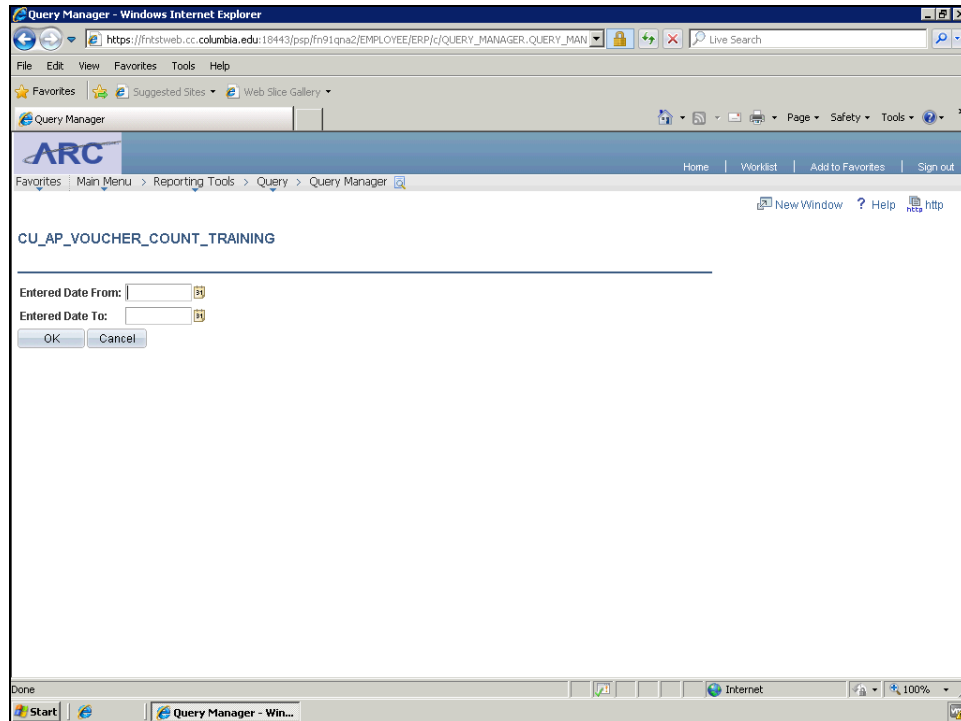
Query Name: CU_AP_VOUCHER_COUNT_TRAINING Description: Count of Vouchers


Having Criteria

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.VOUCHER_ID - Voucher ID	greater than	10	Edit	

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

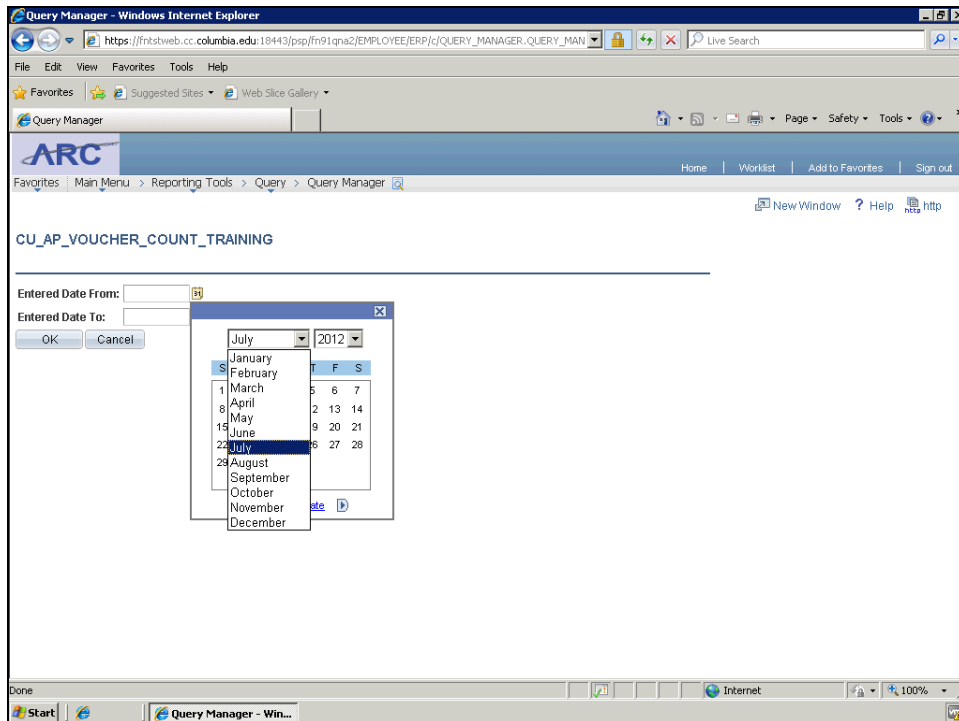
Step	Action
84.	Click the Run tab. 



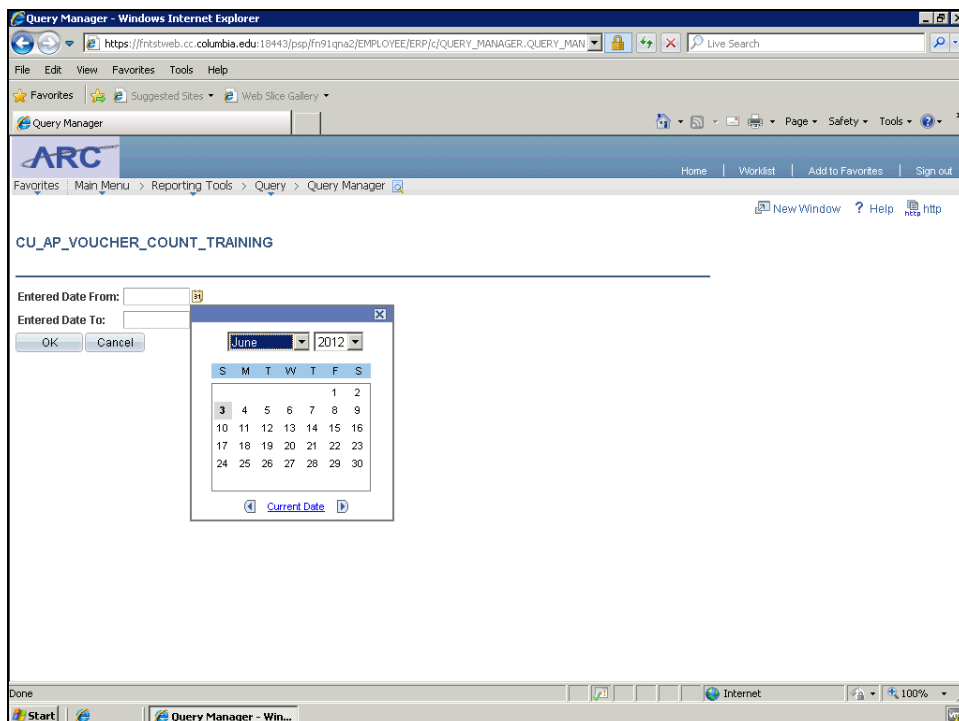
Step	Action
85.	Click the Choose a date (Alt+5) button. 

Training Guide

Advanced ARC Reporting



Step	Action
86.	Click the June list item. June





Training Guide Advanced ARC Reporting

Step	Action
87.	Click the 1 link. <div>1</div>

Query Manager - Windows Internet Explorer

https://fnkstweb.cc.columbia.edu:18443/psp/fn91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER_QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home | Worklist | Add to Favorites | Sign out

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

New Window ? Help http

CU_AP_VOUCHER_COUNT_TRAINING

Entered Date From: 06/01/2012

Entered Date To:

OK Cancel

javascript:DatePrompt_win0("bind_bind2","bind_bind2\$prompt","450",false);

Start Query Manager - Win...

Step	Action
88.	Enter the desired information into the Entered Date To field. Enter " t ".

Training Guide

Advanced ARC Reporting



Query Manager - Windows Internet Explorer

https://fnstweb.cc.columbia.edu:18443/psp/fm91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER_QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home Worklist Add to Favorites Sign out

Favorites Main Menu > Reporting Tools > Query > Query Manager

CU_AP_VOUCHER_COUNT_TRAINING

Entered Date From: 06/01/2012

Entered Date To:

OK Cancel

Step	Action
89.	Click the OK button. <div>OK</div>

Query Manager - Windows Internet Explorer

https://fnstweb.cc.columbia.edu:18443/psp/fm91qna2/EMPLOYEE/ERP/c/QUERY_MANAGER_QUERY_MAN

File Edit View Favorites Tools Help

Query Manager

ARC

Home Worklist Add to Favorites Sign out

Favorites Main Menu > Reporting Tools > Query > Query Manager

Records Query Expressions Prompts Fields Criteria Having View SQL Run

Entered Date From = 2012-06-01, Entered Date To = 2012-07-03

View All | [Rerun Query](#) | [Download to Excel](#) | [Download to XML](#)

First 1-17 of 17 Last

	Entered Date	Entry Status	Count Voucher	500 Threshold
1	07/02/2012	Postable	21	<= 500
2	06/29/2012	Postable	53	<= 500
3	06/28/2012	Postable	54	<= 500
4	06/26/2012	Postable	35	<= 500
5	06/25/2012	Postable	41	<= 500
6	06/19/2012	Recycle	57	<= 500
7	06/19/2012	Recycle	12	> 500
8	06/18/2012	Postable	63	<= 500
9	06/15/2012	Postable	15	<= 500
10	06/15/2012	Postable	13	> 500
11	06/13/2012	Recycle	110	<= 500
12	06/13/2012	Recycle	11	> 500
13	06/12/2012	Postable	71	<= 500
14	06/08/2012	Recycle	112	<= 500
15	06/08/2012	Recycle	12	> 500
16	06/07/2012	Postable	109	<= 500
17	06/07/2012	Postable	16	> 500

Done

Query Manager - Win...



Training Guide

Advanced ARC Reporting

Step	Action
90.	You have successfully created an advanced query using expressions, prompts, and having criteria. End of Procedure.

Knowledge Assessment

If you are taking this course to obtain security access to one of Columbia University's Financial Systems, please ensure you have completed the following:

1. **Security Application Request:** All security roles must be requested by the user through the Columbia University Financial Systems Security Application which can be found in the Service Catalog of ServiceNow (<https://columbia.service-now.com/> (<https://columbia.service-now.com/>)). *Note: All security roles must be approved by both the user's manager and Department Security Administrator (DSA) for the School/Admin Unit to which access is being requested.*
2. **Training Requirements:** Security access will only be granted once all training requirements have been fulfilled. After a user has reviewed all of the applicable training material for a particular role, users must complete the Knowledge Assessment associated with that training course with a score of 90% or higher. The Knowledge Assessments can be found in New CourseWorks by clicking here (<https://newcourseworks.columbia.edu/samigo-app/servlet/Login?id=4c76aeef-f828-4d54-a825-594f946816261341498243885>). If you have any questions about the training required for any security role, click here (http://gateway-7.webservices.lamptest.columbia.edu/files/gateway/content/training/job_aids/Job_Aid_Role_to_Course_Directory.pdf) for the Role to Course Directory job aid.

If you are taking this course for information purposes only, i.e., you are not requesting a security role, no Knowledge Assessment is required.



Course References

Please find links to all of the Job Aids, Policies, and Procedures that were referenced throughout this course:

Job Aid: Getting Started With the Web-Based Training Tool
Advanced ARC Reporting Training Guide