Query User Guide

Rights to the contents of this document
All rights reserved. Information contained in this document is Copyright and proprietary to Infor Public Sector and may be used or disclosed only with written permission from Infor Public Sector.

This document or any part thereof may not be reproduced in any way without the written permission of Infor Public Sector.

Feedbacks
Your suggestions and comments regarding this documentation are highly regarded. Please send or fax any suggestions to your Infor Public Sector office – lghelpdesk@infor.com.

SOUTH AUSTRALIA
PO Box 360
Goodwood SA 5034
Tel: +61 8 8372 6111
Fax: +61 8 8372 6199

NEW SOUTH WALES
Level 3,
40 Miller Street
North Sydney, NSW 2060
Tel: +61 2 9021 7100
Fax: +61 2 9021 7298

NEW ZEALAND
Infor Public Sector NZ
93 Grafton Road
PO Box 2733
Auckland, NZ
Tel: +64 9 309 1860
Fax: +64 9 356 1860

VICTORIA
Level 8, 1 Southbank Blvd
Southbank, Vic 3006
Tel: +61 3 8608 8500
Fax: +61 3 8608 8599

QUEENSLAND
Level 13, 50 Cavill Avenue
Surfers Paradise, QLD 4217
Tel: +61 7 5635 4344

Pathway 3.09 (Thick Client Version)

Copyright © 2014 Infor.
All rights reserved. The word and design marks set forth herein are trademarks and/or registered trademarks of Infor and/or related affiliates and subsidiaries. All rights reserved. All other trademarks listed herein are the property of their respective owners. www.infor.com.

Table of Contents

QUERY USER GUIDE

OVERVIEW 1
PARAMETERS 3
Parameter Maintenance 5
Parameter Maintenance Form 5
Query Model Maintenance 6
Query Model Maintenance Form 6
Query Entity Maintenance Form 6
Query Field Maintenance Form 7
Import/Export Format Maintenance 9
Export/Import Format Search Profile Form 9
Export/Import Format Selection Form 9
Export/Import Format Maintenance Form 10
Export File Sort Sequence Maintenance Form 14
Export/Import Data Base Field Maintenance Form 15
Export/Import User Defined Field Maintenance Form 18
MAINTENANCE 24
Query Maintenance 26
Query Search Profile Form 26
Query Selection Form 26
Query Construction Form 28
Advanced Query Construction Form 32
Query Path Links Maintenance Form 35
Entity Pop Up Form 36
Field Pop Up Form 36
Value Pop Up Form 37
Result Maintenance 39
Result Search Profile Form 39
Query Result Selection Form 39
Result Maintenance Form 41

Query Result Detail Enquiry Form 42
Query Result Pop Up Form 44
Query Result Details Form 45
EXPORT / IMPORT ENTITY CONTROL 46
Export Entity Control 48
Export Entity Control Form 48
Export/Import Format Pop Up Form 49
Import Entity Control 50
Import Entity Control Form 50

Overview

The Pathway Query Facility allows a search and selection process to be performed on all the key data held in the system.

The Query function is performed at a field level. Conditional operator characters must be utilised (e.g. =, >, < etc), to test the value of a field and determine whether this database record is to be included in the final query result.

A combination of field testing can be performed within one query if required.

A Query definition will require the following decisions to be made and information to be specified:

- Select the model basis for the query - this will be an entity which represents the application that the query refers to
  For example
  LPAPROP - Property Based Query
  CRCRCPT - Receipting Based Query

- Select the Entity that the query will be based on. The entity tables displayed will be tailored based on the Property Model which has been previously selected. (i.e. a selection of a Property Model will display all Property based entities).
- Select the Field(s) that you wish to use to test the query. The field names displayed when selected from the pop-up will include all fields for the selected entity.

The Pathway Batch Processing System will be utilised to run the query and create a query extract file with the required results. This Query Result can then be utilised within certain standard update and report options.

Query Example

Identify all Application receipts within a given date range

Description Identify Application Receipts - current processing date
Select CRCRCPT

	Entity	**Field**	**Operator**	**Value**
	Application	Application Code	=	AP
AND	Receipt	Date/Time	=	230798

Parameters

This section deals with query parameter maintenance. Further details are provided in the following sections:

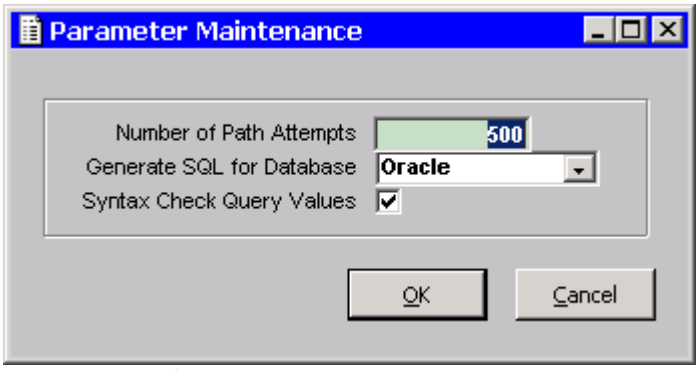
Parameter Maintenance
Query Model Maintenance
Import/Export format Maintenance

Parameter Maintenance

The Parameter Maintenance section provides information on setting up parameters within which the Query module is to operate. These parameters should be established prior to operation of the Query application.

Parameter Maintenance Form

This form allows the user to establish various parameters within which the query application is to operate.



Parameter Maintenance Form

Number of Path Attempts
This field allows entry of the number of attempts allowed to join the nominated entities within the query.

Generate SQL for Database
This field is used to specify which database is to be used for generating SQL. Three options are available from the drop down list:

- Oracle
- Solid Server
- SQL Server

Syntax Check Query Values
Check this field on if syntax checking is to be used for dates and numbers.

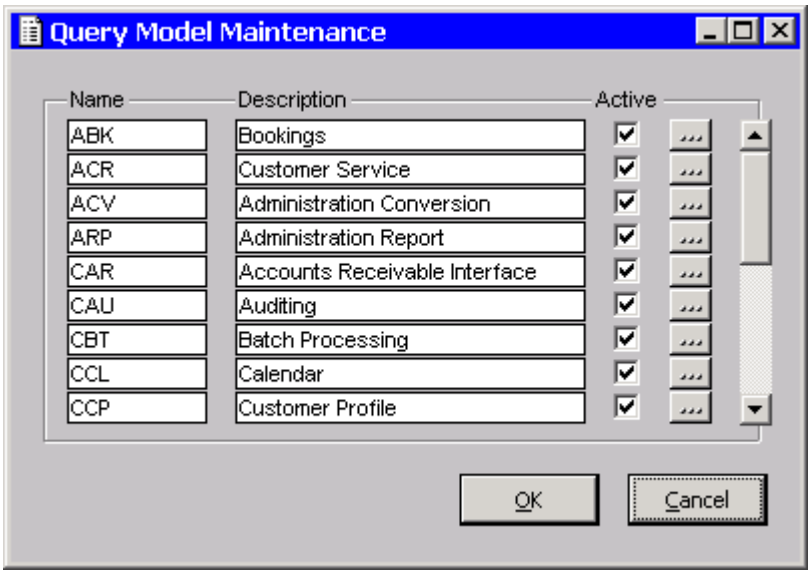
Query Model Maintenance

The Query Model Maintenance section provides information on setting up parameters within which the Query module is to operate. These parameters should be established prior to operation of the Query application.

Query Model Maintenance Form

This form displays a list of applications that can be made active or inactive for use in the query process.

For example, if you are not using the Customer Requests module then you may choose to make the ACR model “Inactive” by switching off the Active Flag. This means that during any Query process the ACR entities will not be available for selection.



Query Model Maintenance Form

Name
This field displays the model name.

This field is display only and cannot be maintained.

Description
This field displays a description of the model.

This field is display only and may not be maintained.

Active
Check this flag on if you wish to make the model available to the query process.

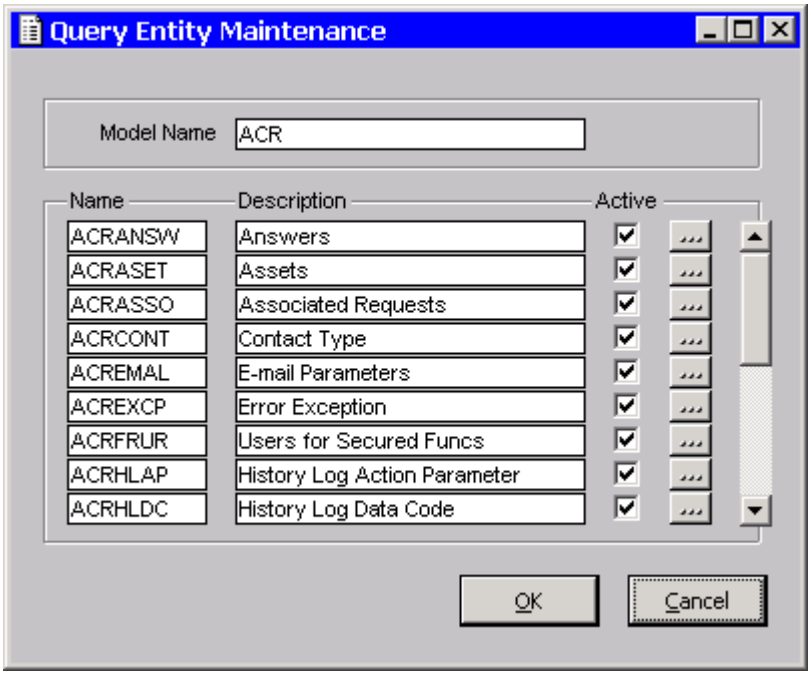
For example, if you are not using the Customer Requests module then you may choose to make the ACR model “Inactive” by switching off the Active Flag. This means that during any Query process the ACR entities will not be available for selection.

Detail Button
Selection of the Detail button displays the Query Entity Maintenance Form.

Query Entity Maintenance Form

This form displays a list of entities that can be made active or inactive for use in the query process.

For example you may have selected to make the Customer Request Module (ACR) available for use, however you do not want users to access the System Parameters Entity (ACRPARM) in the Query module. Therefore, you would make this entity “inactive”.



Query Entity Maintenance Form

Model Name
This field displays the model selected from the Query Model Maintenance Form.

This field is display only and may not be maintained.

Name
This field displays the entity name.

Only those entities available within the selected application model will be displayed.

This field is display only and may not be maintained.

Description
This field displays the entity description.

This field is display only and may not be maintained.

Active
Check this flag on if you wish to make the entity available to the query process.

For example you may have selected to make the Customer Request Module (ACR) available for use, however you do not want users to access the System Parameters Entity (ACRPARM) in the Query module. Therefore, you would make this entity “inactive”.

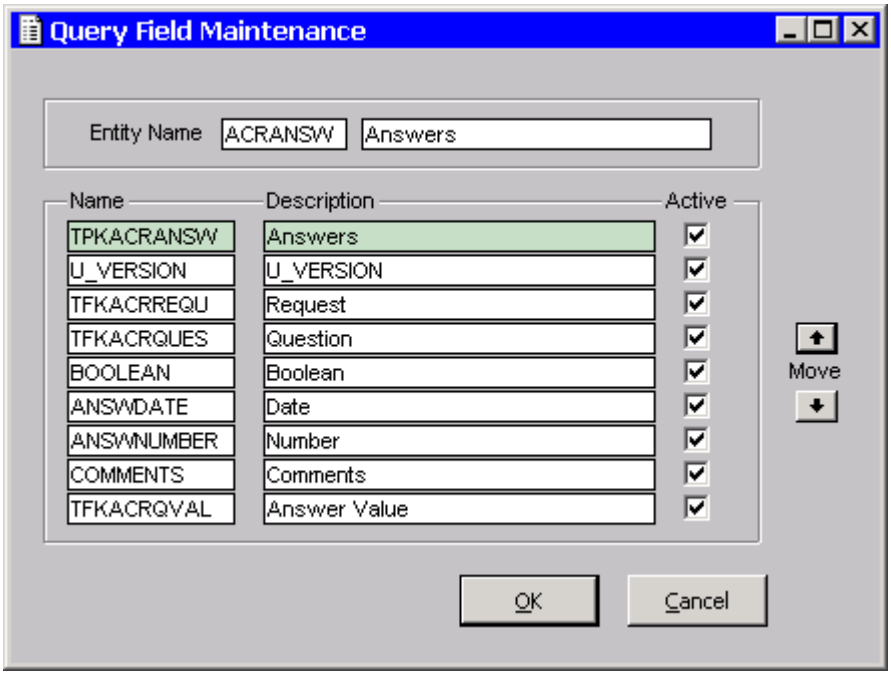
Detail Button
Selection of the Detail button displays the Query Field Maintenance Form.

Query Field Maintenance Form

This form displays a list of fields that can be made active or inactive for use in the query process.

This is the third level of security for the Query process.

At this level you may select specific fields to be made “Inactive” and not available to the Query system.



Query Field Maintenance Form

Entity Name

These fields display the name and description of the entity selected for maintenance in the Query Entity Maintenance Form.

These fields are display only and may not be maintained.

Name

This field displays the Field name. Only those fields available within the selected entity will be displayed.

This field is display only and may not be maintained.

Description

This field displays the field description.

This field is display only and may not be maintained.

Active

Check this flag on if you wish to make the field available to the query process.

If you make a field “Inactive” it will not be available to the User within the Query system. This means that the field may not be chosen as a search parameter in a query, nor would it be available for exporting.

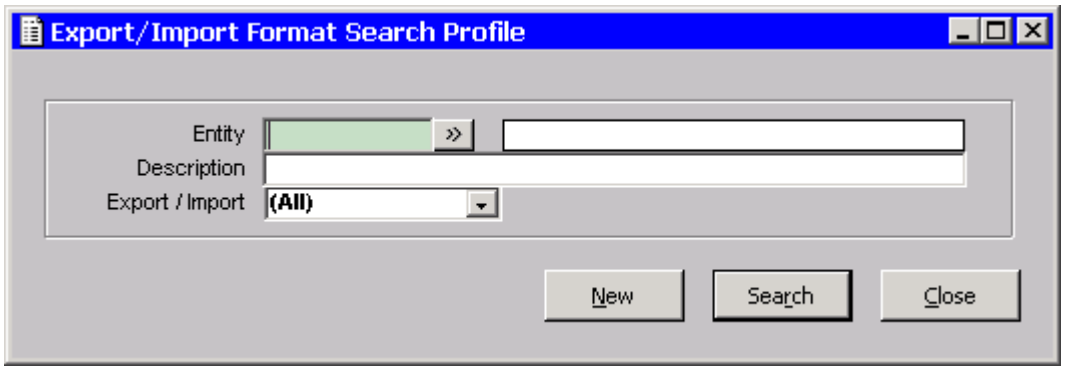
Import/Export Format Maintenance

The Import/Export Format Maintenance allows for the specification of “templates” upon which import and export files are based.

For example to create a “flat” file of Pathway financial transactions you will first need to define an “Export Template”. The template contains the names of fields and the order in which they are written to the flat file, as well as other attributes for the export.

Export/Import Format Search Profile Form

This form allows the user to search for an existing export or import format, or create a new one.



Export/Import Format Search Profile Form

Entity

Enter an entity name in this field or select one from the pop up.

If this field is left blank and the Search button is selected, a list of all formats will display for selection. Wildcard searching is available on this field.

Description

Enter a format description on which to base your search and select the Search Button. Wildcard searching is available on this field.

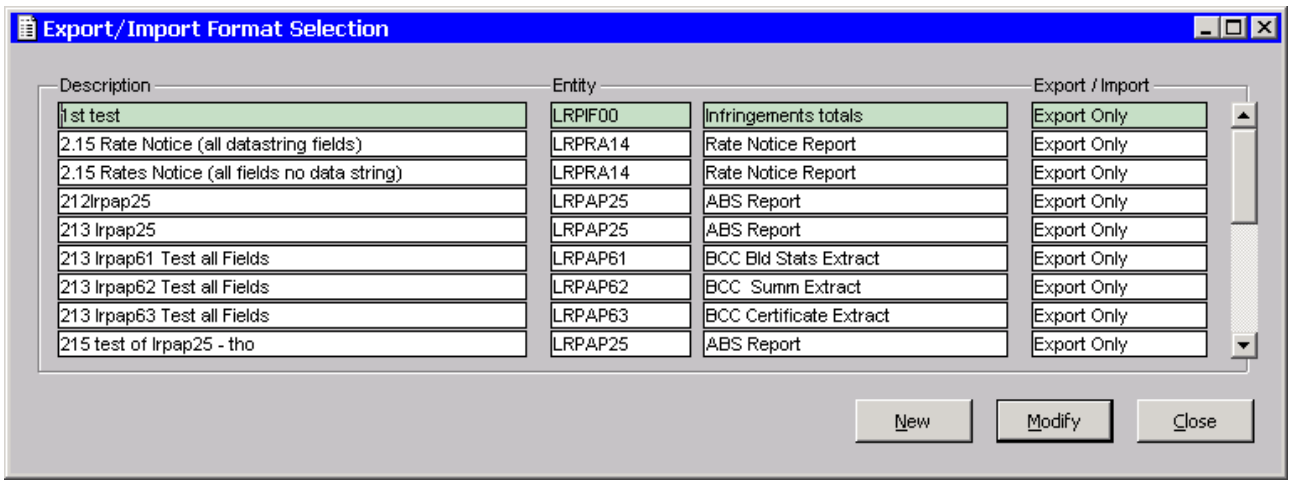
Export/Import

This field is used to specify the type of formats you wish to retrieve. The choices available are:

- Export & Import
- Export Only
- Import Only
- (All)

Export/Import Format Selection Form

This form allows the user to select an export or import format, or elect to create a new one.



Export/Import Format Selection Form

Description
This field contains the description of the format.

This field is display only and may not be maintained.

Entity
These fields contain the Pathway entity name and description used in the export/import format.

This field is display only and may not be maintained.

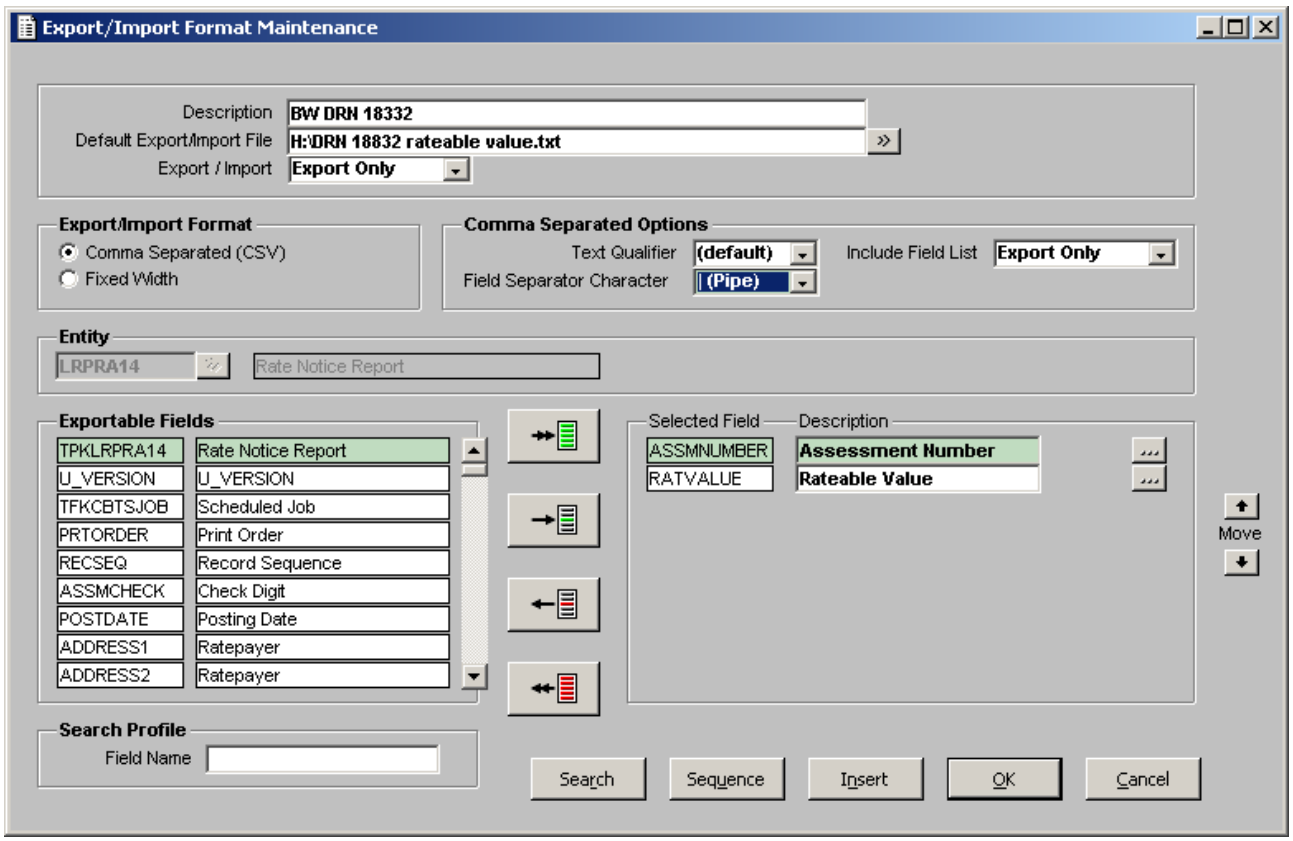
Export/Import
This field displays whether the format is export only, import only, or both.

Export/Import Format Maintenance Form

This form allows the user to establish and modify an export/import format. This form is accessed when a selection is made on the Export/Import Format Selection Form and Modify or New is selected.

This form will also be displayed if the export format button is pressed on a specific export function e.g. Ledger Transaction Export.

Fields may also be defined that are not specifically held within the data base by pressing the Insert Button. For example a sequence number may be required for each record in the export file. By pressing Insert a new line is added to the export format and you would enter a field name e.g. Sequence Number. Pressing the Detail Button will then take you to the Export/Import User Defined Field Maintenance form where the sequence field would be set up. Other functions such as calculating results based on a calculation expression are also available. For more information on this feature see the Export/Import User Defined Field Maintenance section.



Export/Import Format Maintenance Form

Description
This field displays the format description selected from the previous form. This field can be maintained.

Default Export/Import File
This field displays the default export/import file. The path and filename can be changed by typing directly into the field, or a selection can be made using the pop up.

Export/Import
This field displays whether the format is to be used for Export only, Import only or the one format can be used for both Import and Export. This field must be defined to allow selection of the Entity to be used.

Export/Import Format - Comma Separated (CSV)/Fixed Width
The format flags are used to specify the format for the export/import file. Selecting Comma Separated (CSV) Format specifies that each field is separated by a comma. The fields can be of any length.

Selecting Fixed Width Format specifies that the fields to be exported or imported are of a fixed length and there is no separating character between fields. The length of each field is nominated in the selected field column when fields are selected for export or import.

Comma Separated Options - Text Qualifier
If Comma Separated Format is selected, the Comma Separated Options fields become available.

The text qualifier field is used to specify whether single or double quotation marks are to be used to encompass a text field.

If the single quote is selected from the drop down list then exported fields will be contained within a single quote symbol (‘). A comma will still separate the fields.

If the double quote is selected from the drop down list then exported fields will be contained within a double quote symbol (“). A comma will still separate the fields.

If (default) is selected from the drop down list then exported fields will only be separated by a comma.

Example
Double Quote

"LG","4100023","17-Jan-2000","+90.90"

Single Quote
'LG','4100023','17-Jan-2000','+90.90'

(default)
LG,4100023,17-Jan-2000,+90.90

Comma Separated Options - Field Separator Character
The field separator field is used to specify for "Export Only" formats the choice between a comma and a pipe when outputting to a CSV format file. This parameter is not available if "Export/Import" is not set to "Export Only" and "Export/Import Format" is not "Comma Separated (CSV)".

Comma Separated Options - Include Field List
This option allows you to choose whether or not a list of field names is to be included in the export file generated, or is included in an import file as the first record in the text file.

If the option to Include a Field List is selected then the following rule applies:-

Export File – The Field List will contain the field names described in the Description column. This description is user definable however will be defaulted to Pathway field names initially. For example, your external general ledger system may insist on its field names being contained within the text file, you would therefore change the Pathway field names to those matching your financial system.

Import File – The Field List must contain the Pathway "technical" field names, that is the Selected Field description e.g. CDECFILEDG for the Ledger Code.

(none) - If (none) is selected then the first record in the text file is considered to be a data record.

Example
Export File
Ledger,Account,Transaction Date,Transaction Amount
LG,4100023,17-Jan-2000,+90.90

Import File
CDECFILEDG,ACCOUNT,DATCFITRAN,AMTCFITRAN
LG,4100023,17-Jan-2000,+90.90

(none)
LG,4100023,17-Jan-2000,+90.90

Select from the drop down list of options. The list, which is based on the "Export/Import" drop down list selection, includes the following options:

Export/Import Value	Include Field List Drop Down List Options
Export Only	Export Only, (None)
Import Only	Import Only, (None)
Export & Import	Export Only, Import Only, Export & Import, (none)

The "Export & Import" template can be used when a field list is required for the exported ASCII file but not required for the imported ASCII file. E.g. Victorian Valuations Inspection Extract and Import.
This enables a single "Export & Import" template to be defined rather than an "Export Only" template and an "Import Only" template.

Note: When maintaining an Import File, the field list is always specified as the first record of the file. Therefore, if the Import Only option is selected, the fields below become dimmed and cannot be selected. This is because the supplied field list names will drive the import process, not the selected list below.

Entity

Enter the entity whose fields you wish to import or export, or select one from the Pop Up. When the entity is entered into the field, a list of exportable fields displays. These fields can be selected for inclusion in the Export/Import Format.

If you have accessed this form from a specific function e.g. Ledger Transaction Export then this field is automatically populated with the valid entity name and cannot be changed.

The Entities that are displayed in the Pop Up list are determined by the settings contained within Query Model Maintenance.

Note: To be able to enter in the Entity to be used the Export/Import field must be defined.

Search Profile
This field is only available for export formats where a user defined search profile has been created for one or more of the exportable fields.

The search criteria is entered on the Export/Import Data Base Field Maintenance form.

For example if you were exporting customer request data from ACRREQU and only wanted to export Unactioned requests, you would select to export the Status Field and press the detail button to display the Export/Import Data Base Field Maintenance form. In the search criteria field you would enter U. The Search Profile on this form would be displayed as (REQUSTATUS:U).

Exportable Fields
These fields display the fields available to be exported or imported. (Note they will not be available for selection on an Import Only format where “Include Field Names” has been selected.)

To select fields for export or import, highlight the field and choose the Select Button to move the selected field to the right hand side of the form.

To remove a field that has been selected, highlight the field on the right hand side and select the Remove Button.

The fields that are displayed are governed by the settings within Query Model Maintenance.

Selection Options
The Selection Options allow for the moving of the required fields from the Exportable List to the Selected List or visa versa. If all fields are required to be moved then the Select All or the Remove All options can be used to move all the fields from one side to the other.

Selected Field
These fields display the field name and description of those fields selected for export.

Length
This field is only presented if the export/import file format is of “Fixed Width”.

When using the “Fixed Width” format each field to be exported or imported must have a nominated field length. When a field is first selected the system will default the Pathway field length value. You may override this value however you must be aware that if you specify a length greater than that supplied by Pathway if data is being imported into Pathway it will be “truncated”.

Detail Button
Selection of the Detail Button displays the Export/Import Field Maintenance Form, where field details can be maintained.

Search Profile – Field Name
To enable ease of selection of the required Export fields the Search Profile can be used to display the required field(s) to enable them to be selected and moved to the Selected List. The User can enter in the Field Name or part thereof and use the Search Option to limit the display to those Fields that match the Search criteria. Wildcard searching is available in this field.

The Search Profile only works over the Exportable Fields. It will not function over the Selected List of fields.

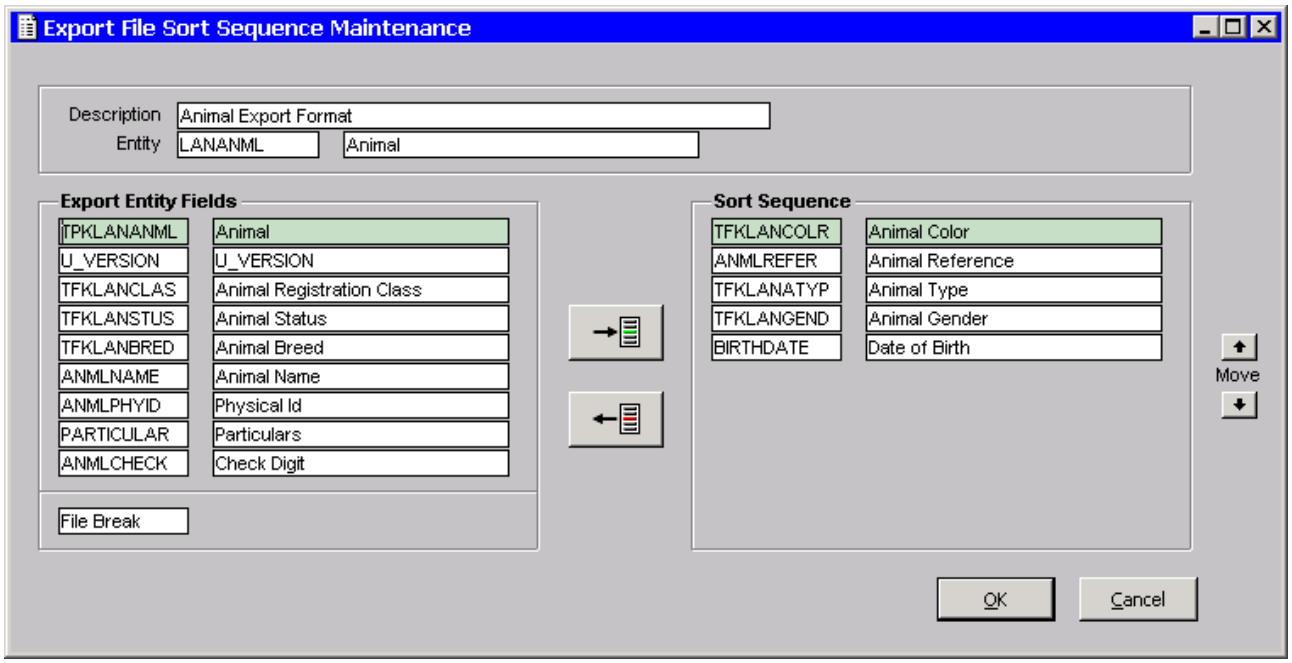
Sequence Button
Pressing this button will display the Export File Sort Sequence Maintenance Form.

Export File Sort Sequence Maintenance Form

This function is only applicable to Export Templates.

It is possible to export the database rows in a user defined sort sequence.
The following example shows how to export all database rows in a Ledger, Year, Period, Account order.

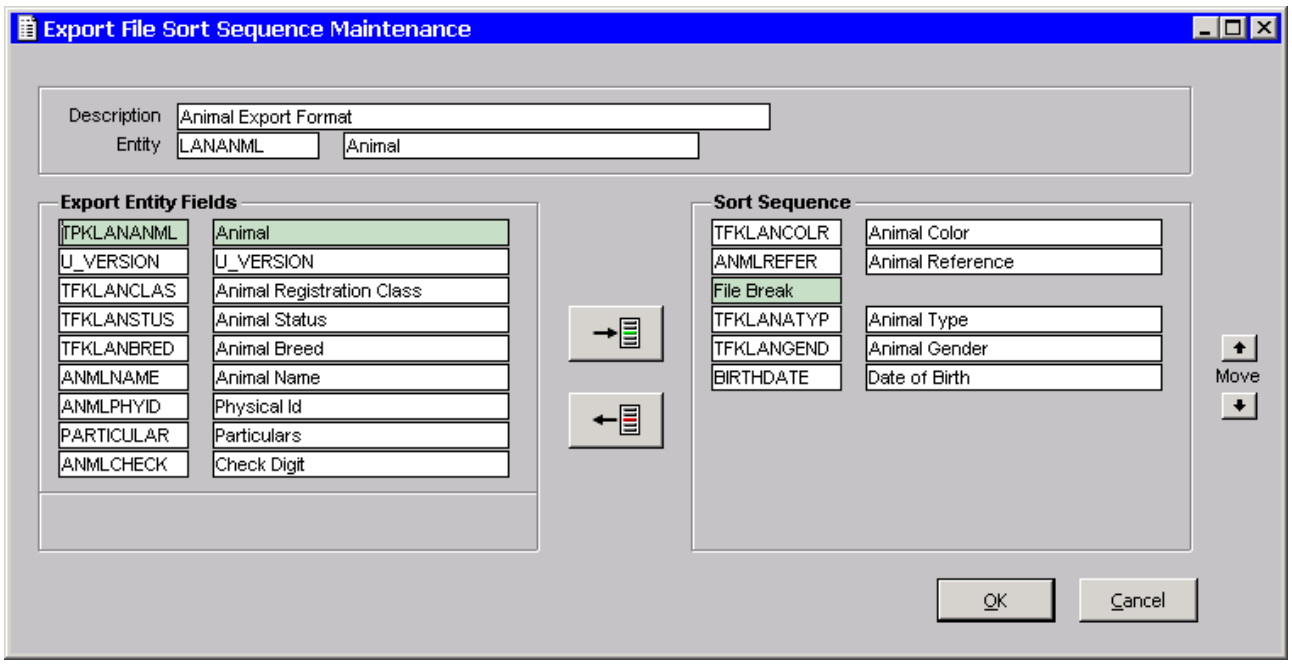
Note: The “Export File Sort Sequence Maintenance” form is accessed via the “Sequence” Button on the “Export/Import Format Maintenance” Form



Export File Sort Sequence Maintenance Form
The “File Break” item can be moved to the “Sort Sequence” area frame to enable multiple ASCII files to be produced by one Export process. Highlight the “File Break” field and use the Select button to move it to the Sort Sequence area.

The following example creates a new ASCII file for each Ledger, Year and Period combination contained within the database table.

A sequential number is appended to the name of each subsequent ASCII file produced.
i.e. If the base ASCII file is called “c:\temp\crpfi01.txt”, the second ASCII file is called “c:\temp\crpfi01_1.txt”, the third ASCII file is called “c:\temp\crpfi01_2.txt”, etc.



Showing File Break position

Description
This field displays the format description selected from the previous form. This field cannot be maintained.

Entity
These fields contain the entity selected from the previous form. These fields cannot be maintained.

Export Entity Fields

These fields display the fields available to be included in the sort sequence. To select a field, highlight the field and choose the Select Button to move the selected field to the Sort Sequence area.

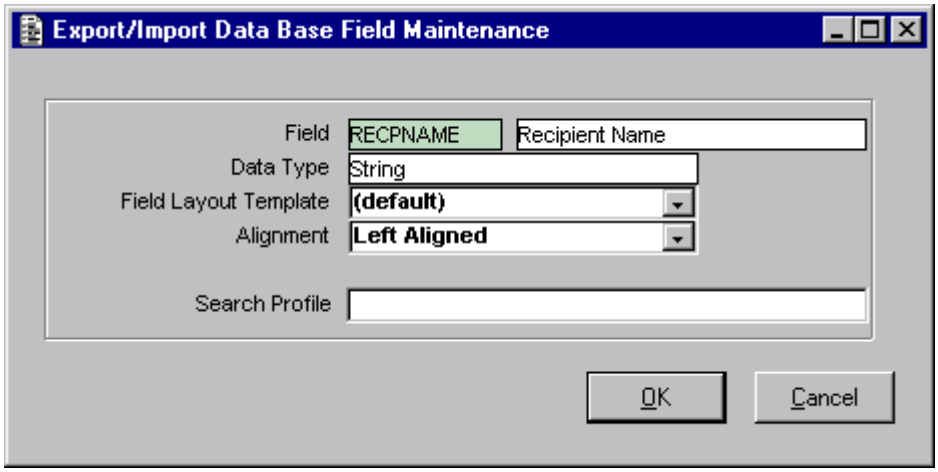
To remove a field which has been selected, highlight the field in the Sort Sequence area and select the Remove Button.

Sort Sequence
These fields determine the order in which the data is exported. The fields may be re-sequenced by using the "Move" Buttons. e.g. If the Sort Sequence contains the fields: Ledger. Year, Period and Account, in that order, then the export file will contain data grouped within those levels,
i.e.
Ledger 1
|
Year 1 Year 2 Year 3
|
Period 1 Period 2 Period 3
|
Account 1,
Account 2,
Account 3 etc

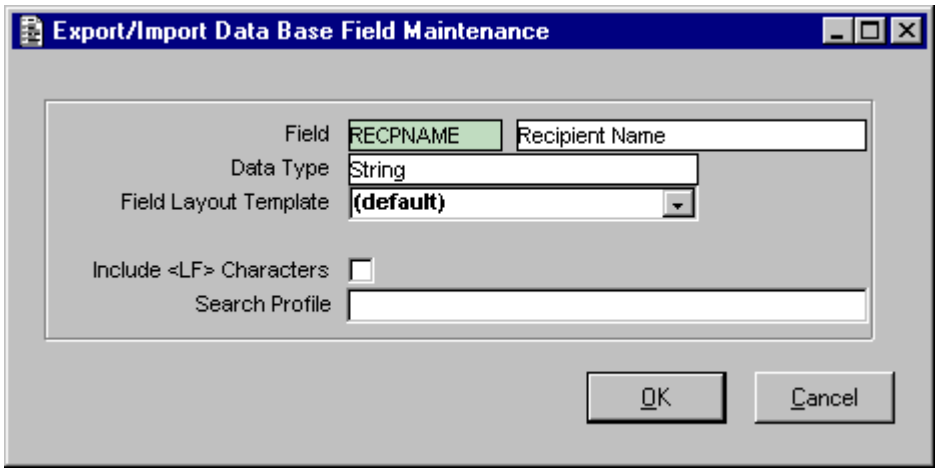
File Break
If this field is moved underneath a field e.g. Period, in the Sort Sequence area, then this will cause a new file to be produced for each new Period.

Export/Import Data Base Field Maintenance Form

This form allows the user to maintain the export or import field details. This form is accessed by selecting the Selected Field Detail Button on the Export/Import Format Maintenance Form.



Export/Import Field Maintenance Form (Fixed width mode)



Export/Import Field Maintenance Form (Comma Separated Format)

Field
These fields display the name and description of the selected field.

Data Type
This field describes the type of field, e.g. String, Date/time, Numeric.

Field Layout Template
This field allows the user to select a field template to use during the export process.

For string type fields, the options available are:
- Uppercase (Will convert all characters in an export file to Uppercase)
- Lowercase (Will convert all characters in an export file to Lowercase)
- (default) (No conversion will be performed on data)

For Date/Time fields the options available are:
dd-Mmm-yyyy
Aaa dd-Mmm-yyyy
Aa* d-Mmm*-yyyy
dd-mm-yyyy
yyyymmdd
ddmmyyyy
dd/mm/yyyy
zh:nn:ss
hh:nn:ss
zh:nn
hh:nn
hhnn
hhnnss

dd-Mmm-yyyy hh:nn:ss
dd-Mmm-yyyy hh:nn
Aa* d-Mmm*-yyyy zh:nn:ss
yyyymmddhhnnss
dd-mm-yy hh:nn:ss
Aaa dd-Mmm-yyyy hh:nn:ss
Ddmmyyyyhhnnss
Dd/mm/yy hh:nn:ss

For a list of options available for Numeric fields please refer to the drop down list.

System defaults can be used in all cases.

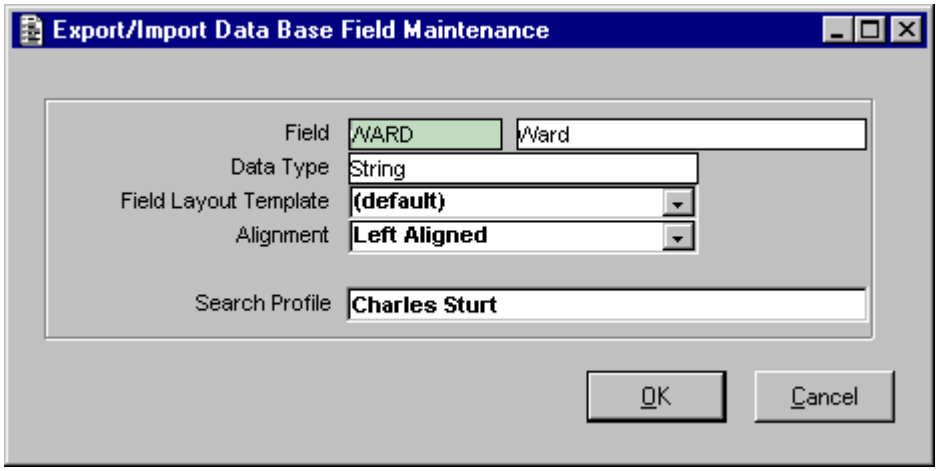
Alignment
This field is available for selection in string type fields where the format is Fixed Length. The options available are:

- Left aligned
- Right aligned

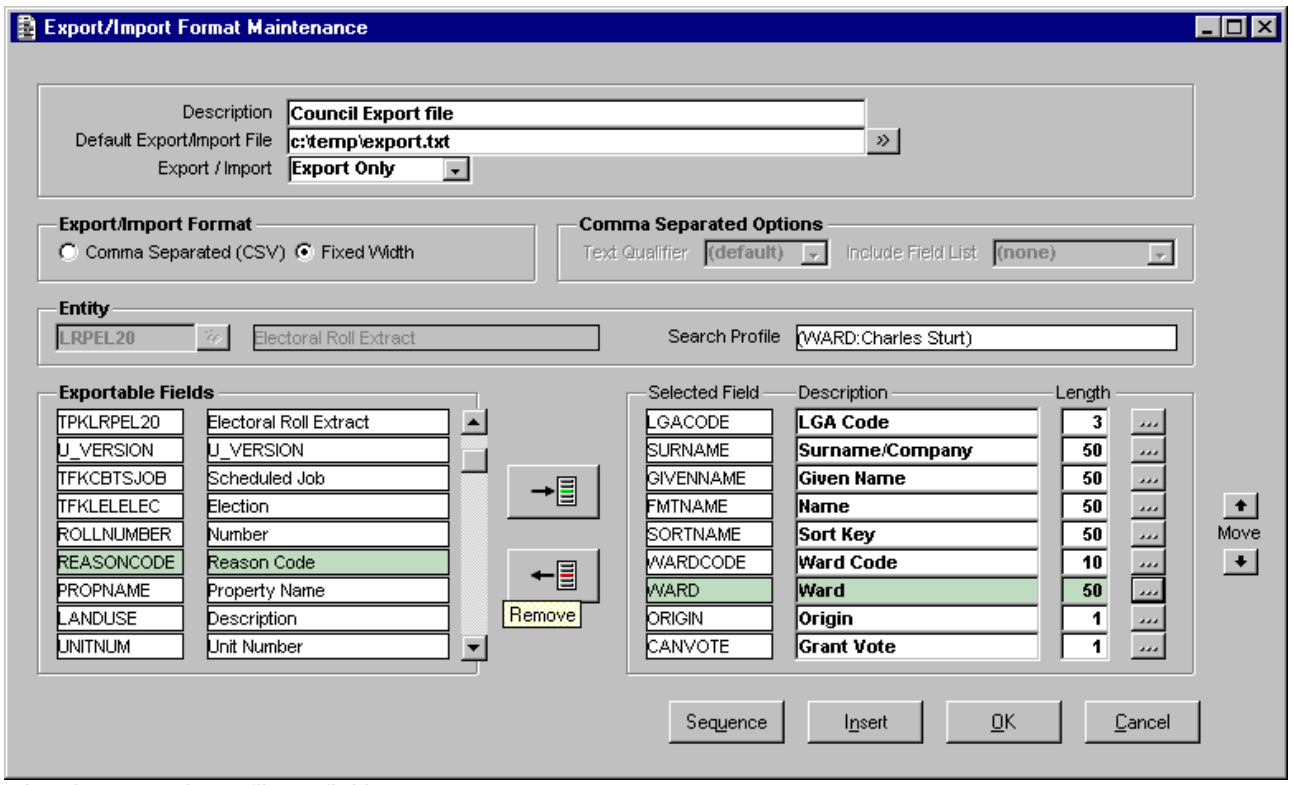
Include <LF> Characters
Check this box if line feed characters are to be included in the export.

Search Profile
The Search Profile field is only applicable to Export Templates. This option enables the exporting of database rows that match a user defined search profile. The following example shows how to export all database rows where the WARD database field is “Charles Sturt”.

Note: The “Search Profile” is defined on the “Data Base Field Maintenance” form and only displayed on the “Export/Import Format Maintenance” form.

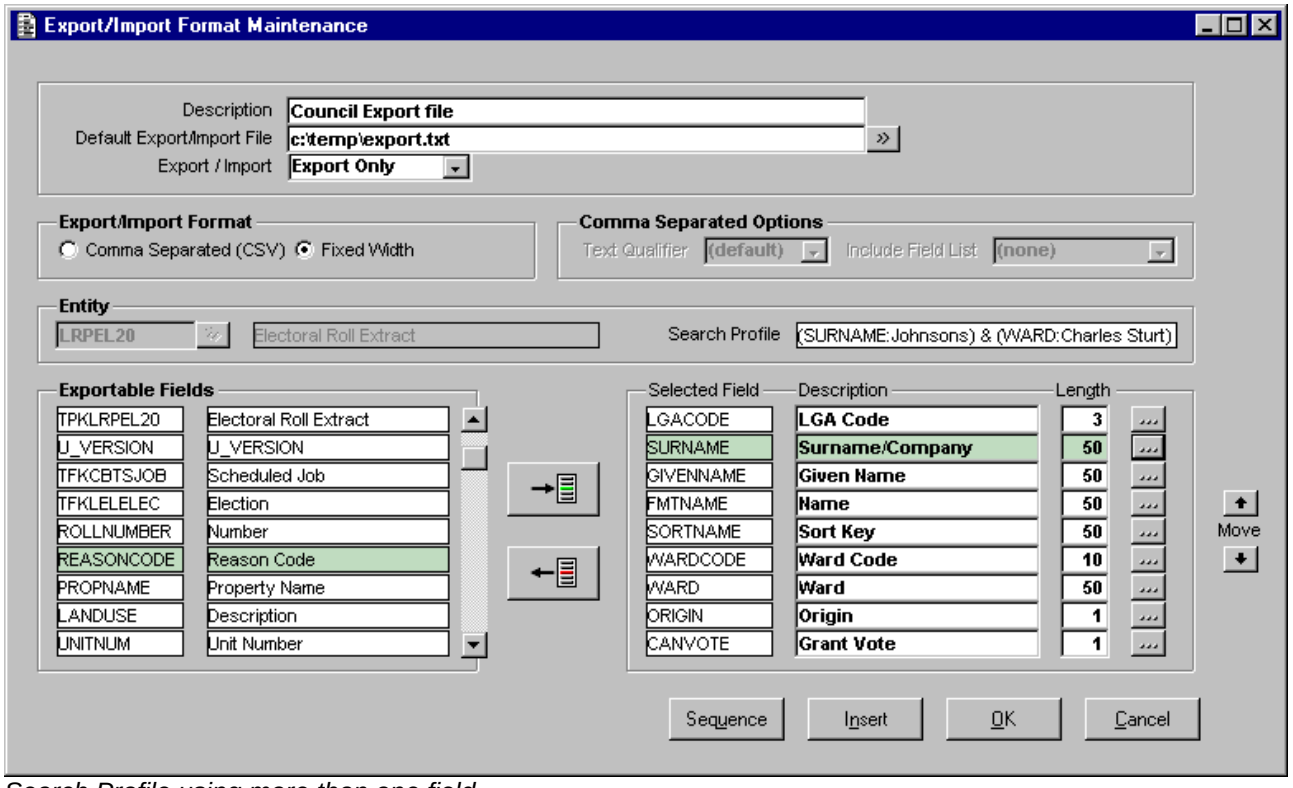


Using Search Profile



Showing Search Profile Definition

Note: If a Search Profile is defined for more than one database field, then an implicit "and" condition is assumed.

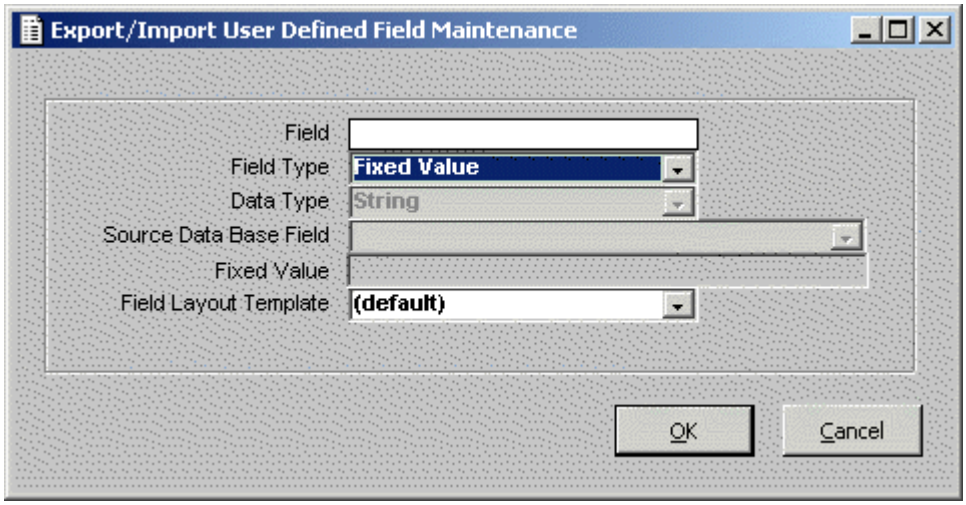


Search Profile using more than one field.

Export/Import User Defined Field Maintenance Form

User Defined fields can be created by selecting the Insert Button on the Export/Import Format Maintenance Form, then selecting the Detail Button adjacent to the field to customise it. These User Defined fields can be

included in the export format. The “Field Type” dropdown list value determines the type of User Defined field. For examples of the use of this form please refer to the information following.



Export / Import User Defined Field Maintenance Form

Field

The Field value will display the information that the User has entered against the inserted User Field. If the Field Type is set to ‘Fixed Value’ then this information will default into the Fixed Value field but can be over written by the User if required.

Field Type

Upon entry into this form the Field Type is set to Fixed Value but can be changed if the User requires another type of Field to be defined.

The Options available are:-

- Calculated Value
- Dissected Field
- Fixed Value
- Generated Sequence

The Field Type nominated will control which remaining fields are to be used or entered into on the form.

Data Type

The Data Type field is only available when the Field Type of ‘Calculated Value’ has been nominated. The Options available for the Data Type are :-

- String
- Special String
- Numeric
- Date
- Time
- Date/Time
- Boolean
- Floating Point
- Linear Date
- Linear Time
- Linear Date/Time

Source Data Base Field

The Source Data Base Field is only available for selection when the Field Type has been set to ‘Dissected Field’. The Fields available will be those fields within the Entity nominated within the Query that are defined as a ‘String’ Data Type.

Field Dissection Characters / Sequence Increment Value / Calculation Expression/ Fixed Value

If the Field Type has been set to ‘Calculated Value’ then this field is displayed with a description of ‘Calculation Expression’.

If the Field Type has been set to 'Dissected Field' then this field is displayed with a description of 'Field Dissection Characters'.

If the Field Type has been set to 'Fixed Value' then this field is displayed with a description of 'Fixed Value'.

If the Field Type has been set to 'Generated Sequence' then this field is displayed with a description of 'Sequence Increment Value'.

Field Layout Template
The Field Layout will default to the 'Default Layout' Template. Depending on what Field Type has been defined will depend on the other values available within this field. They can be either Uppercase or Lower Case if the field type is not a numeric type field. Or the Numeric options will be available if the field is deemed to be of a numeric nature.

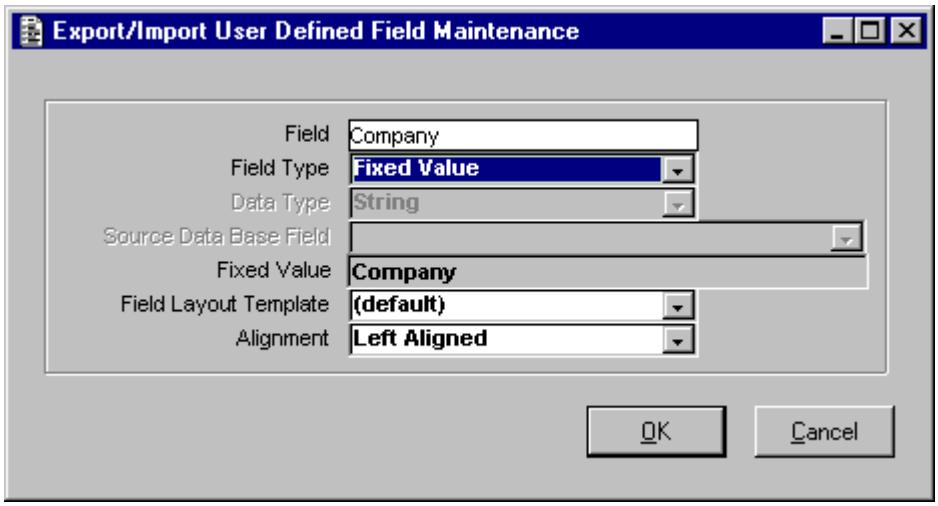
Alignment
The Alignment field is only displayed when the Query Format has been defined as 'Fixed Width'. If the Query Format is set to CSV then this field is not displayed on the form. The Options available are :-

- Left Aligned
- Right Aligned

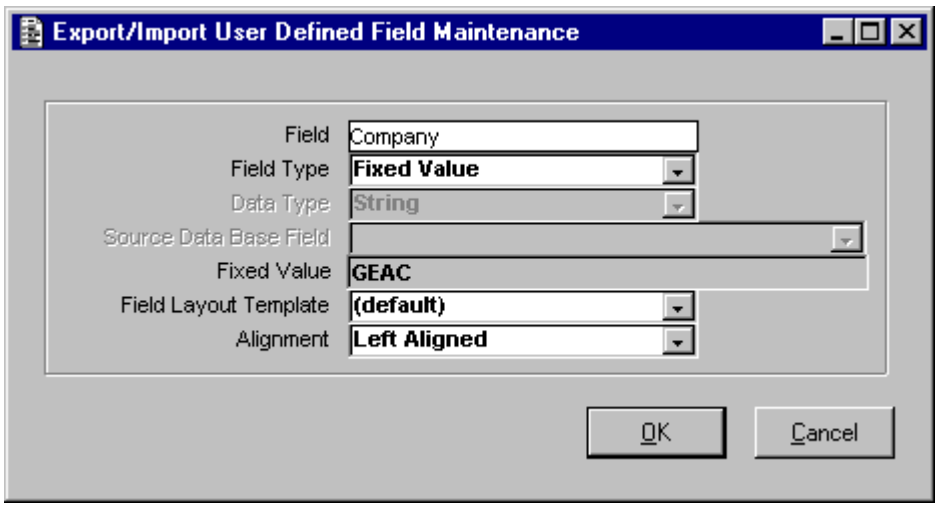
Examples
The Field displays the user entered Field Description. Or this field will remain blank.
Field Type options include the following:

- Calculated Value
- Dissected Field
- Fixed Value
- Generated Sequence

Fixed Value User Defined Fields
Whenever a new field is inserted into an export and/or import template the default attributes of a fixed value string equivalent to the 'description' of the field is assumed. I.e. If a field with a description of 'Company' is inserted into the template then every line exported will contain 'Company' in this field position.



Fixed Value field showing default field value.
The "Fixed Value" entry field can be used to override the value exported on each line. To create an export file with a Field List line containing a column name of "Company" with all data lines containing a fixed constant value of "GEAC" in this column, then override the "Fixed Value" field to "GEAC".



Fixed Value field showing overridden Fixed Value.

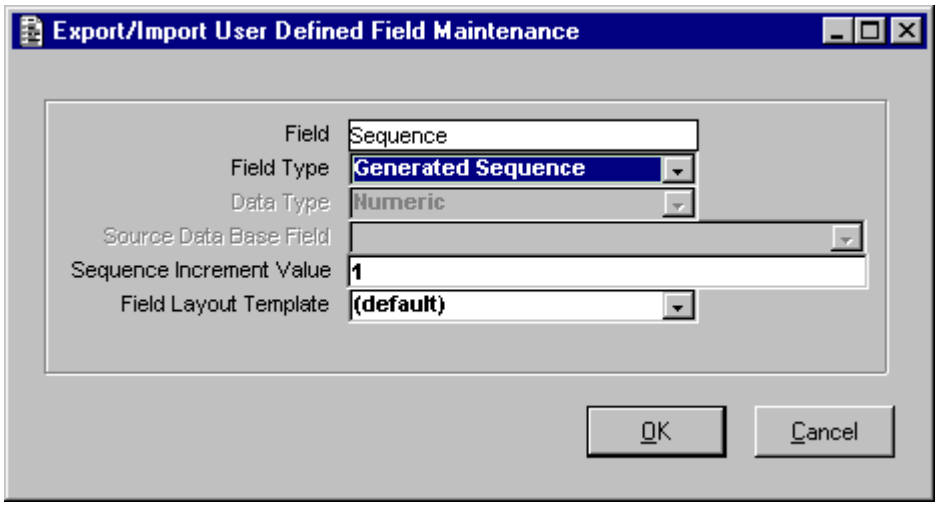
Generated Sequence User Defined Fields

These fields are only applicable to Export Templates.
A 'Generated Sequence' user defined field type will allocated a sequential line number to each exported data line. The 'Sequence Increment Value' determines the increment factor for the line number. The value may be positive or negative and is entered in the Sequence Increment Value field.

Example

To generate a sequence number for each record exported that is to be incremented in a factor of 10 e.g. 10, 20, 30, 40 then the number 10 should be entered in this field.

Where an export file is to be "split" at a file break the sequence number in each file generated will be re-started at the value entered in this field.



Generated Sequence field showing increment factor of

Dissected User Defined Fields

These field types are only applicable to Export Templates.
A 'Dissected Field' user defined field allows a character (string) field to be dissected into one or more sub-fields based on a list of user defined separation characters.

The list of user defined separation characters is always identical for all sub-fields dissected from a single database field.

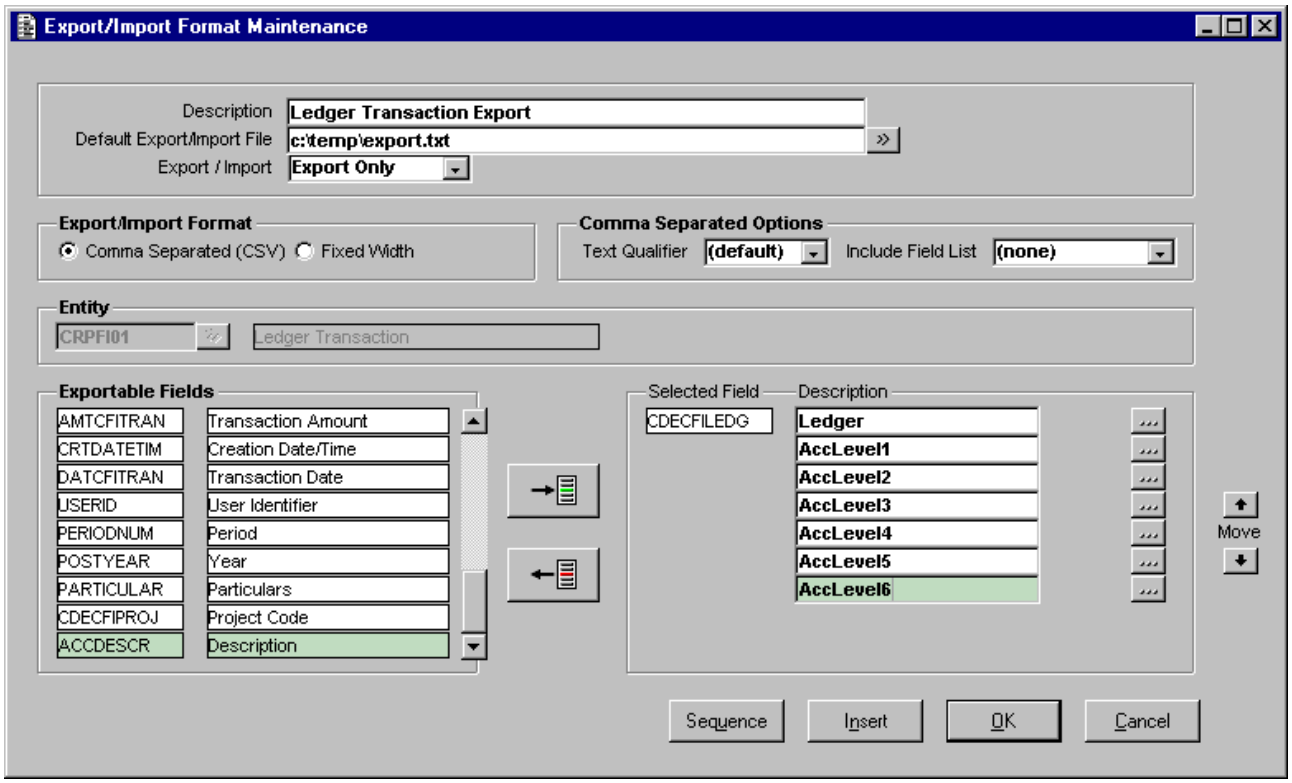
The following example shows how to split the 'Account' Source Data Base field into a maximum of six sub-fields called 'AccLevel1' through to 'AccLevel6'. These six fields are Inserted on the Export/Import Format Maintenance form and given the labels AccLevel1, AccLevel2, AccLevel3 etc. The detail button is then pressed to display the Export/Import User Defined Field Maintenance form. The Dissected Field option must be selected in the Field Type. The database field name is then selected from the Source Data Base Field. The characters upon which to base the dissection are then entered in the Field Dissection Characters field.

For Example if your account numbers are divided with a hyphen symbol then a hyphen character would be entered.

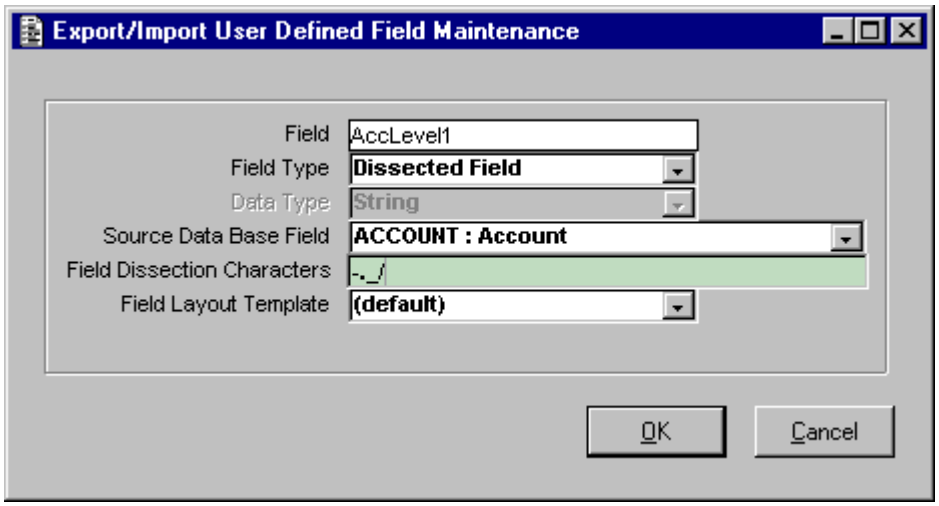
In the example below the dissection process will sequentially allocate a value to each sub-field based on the text separated by a ‘minus sign’ ‘period’ ‘under score’ or ‘forward slash’ character.

e.g. If the Account field contains the value ‘1-22/33_4444..666666’ then the resulting output fields will contain:

- AccLevel1 “1”
- AccLevel2 “22”
- AccLevel3 “333”
- AccLevel4 “4444”
- AccLevel5 “”
- AccLevel6 “666666”



Showing inserted Dissected fields



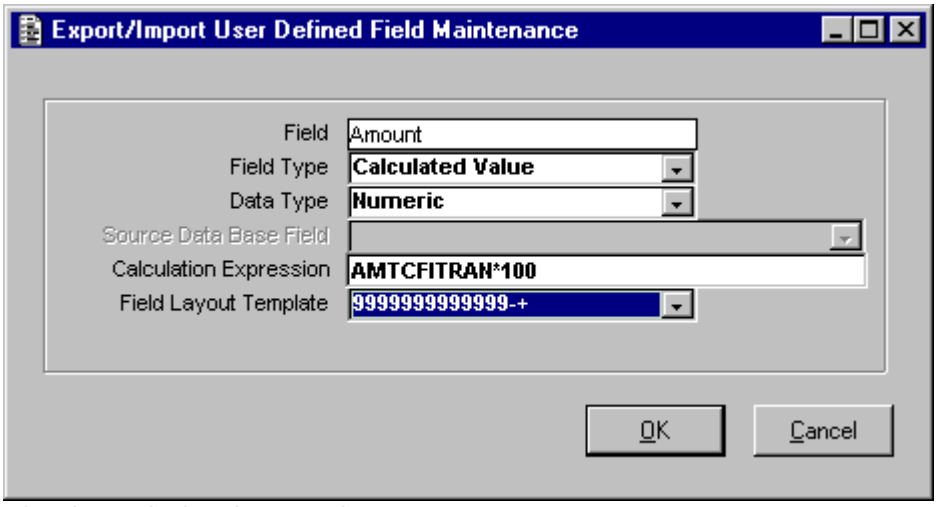
Showing Dissected Field attributes

Calculated Value User Defined Fields

These fields are only applicable to Export Templates.

A ‘Calculated Value’ user defined field enables the entry of a Uniface expression to evaluate a value calculated from other database fields.

The following example shows how to remove the decimal place from an amount field because the target system that will import the ASCII file assumes an implied decimal point on the amount field.



Showing Calculated expression

The above example shows only one of many possible ‘Calculated’ expressions, as the number of Uniface ‘data elements’, ‘constants’, ‘operators’, ‘parentheses’ and ‘functions’ is infinite.

Other Examples of Calculated Expressions

Expanding a Code with its representative Value.

In some cases only a code is held in the data base for certain fields. For example in the Ledger Transaction File only the code A is held in the Transaction Type field in lieu of the text “Actual”. If you wish to export the word “Actual” in lieu of the code then the following expression would be entered in the Calculation Expression.

Item(typcfitran,$valrep(typcfitran))

To extract the text Actioned or Unactioned or No Action Required from the Status Code in ACRREQU the following calculation expression would be entered.

Item(requstatus,$valrep(requstatus))

Concatenating fields

Data within fields may be concatenated together, with the use of a constant character between the field items to form a single output field. This is done in the following manner:

Fieldname%constant%fieldname

The following Calculation Expression would concatenate the Ledger Code, Account No and Transaction Amount together with a hyphen positioned between each field.

Cdecfiledg%-%account%-%amtcfitran

e.g. LG-7219-99.00

Maintenance

The Maintenance section describes forms and fields related to query maintenance. Further details are provided in the following sections:

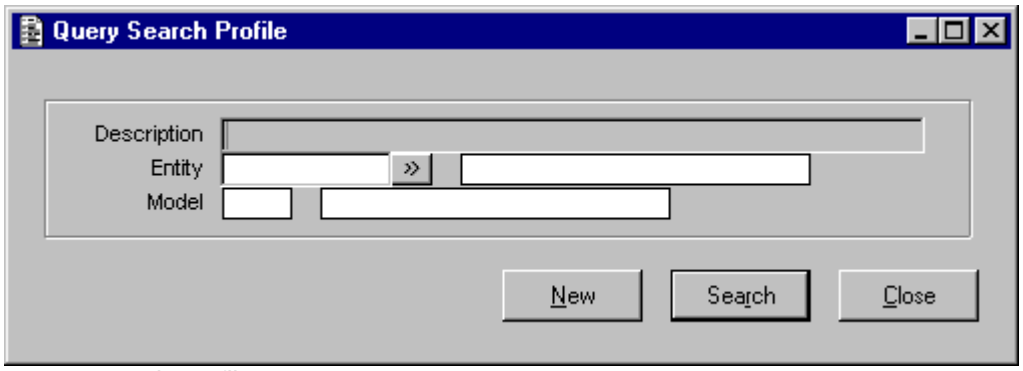
Query Maintenance
Result Maintenance

Query Maintenance

The Query Maintenance section provides information on constructing a new query, or maintaining an existing query.

Query Search Profile Form

This form is used to search for a saved query, or to create a new query.



Query Search Profile Form

Description
Enter a query description on which to base your search. Wildcard searching is available on this field. If this is combined with an entity search, then the entity search overrides the description. Searching on both fields is not available.

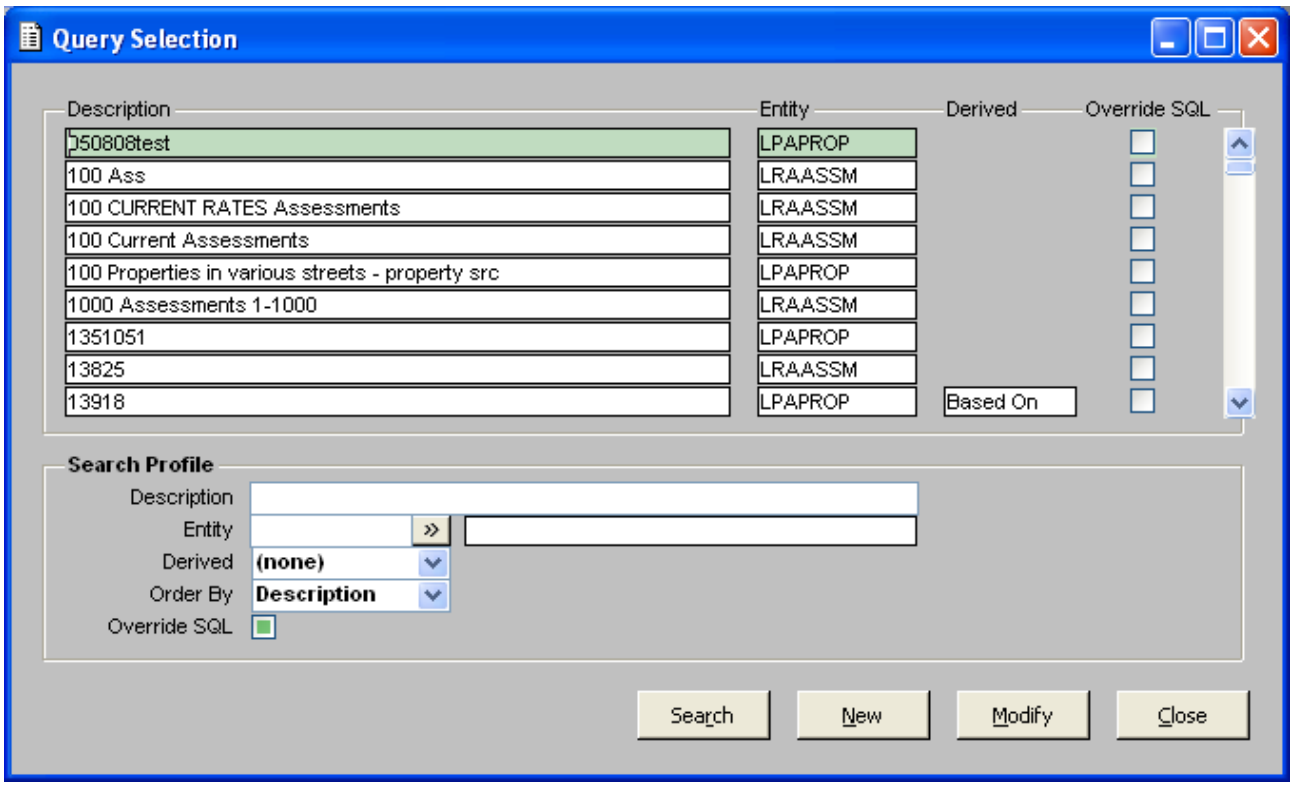
Entity
Enter an entity on which to base your search, or select one from the pop up. Searching cannot be done on description and entity together. Wildcard searching is available on this field.

Model
This field displays the model name and description when an entity is selected.

Query Selection Form

The Query Selection Form is displayed to allow the User to Select the required Query to either be maintained or the Result to be used for reporting etc.

The User is able to use the Search Profile area to define the required Query.



Query Selection Form

Description
This field displays the description of the saved query which is available for selection.

Entity
The Entity that was selected at the time that the Query was created is shown in this field.

Derived
The Derived field shows if the Query incorporates another Query's Result Set.

If Based On is shown then the Query is using another Query's Result Set.
If Union is shown then the Query is using the combined Result Sets of 2 Queries.
If Intersection is shown then the Query is the combined Result Sets of 2 Queries and where records were found to be in both Results Sets they were written to the new Result Set.
If Difference is shown then the Query is using the combined Result Sets of 2 Queries and records were found to only be in one of the Results Sets they were written to the new Result Set.
If the field is blank then they Query is using the entries in the Selected Entity.

For more information on how the Derived field works, refer to the help text associated to the Derived Field on the Query Construction Form.

Override SQL
This check box indicates that the Query has been overridden with user defined SQL.

Search Profile – Description
This field allows a query description to be entered on which to base a search.

Search Profile - Entity

These fields allow an Entity to be entered on which to base a search. Alternatively, a selection can be made from the Pop Up.

Search Profile - Derived
This field allows selection of the Derived options on which to base a search. The Derived options available are:-

- (none) – This will show all Queries
- Based On – This will only show those Queries that have been created with the Derived option set to Based On.
- Union – This will only show those Queries that have been created with the Derived option set to Union.

- Intersection – This will only show those Queries that have been created with the Derived option set to Intersection.
- Difference – This will only show those Queries that have been created with the Derived option set to Difference.

For more information on the use of Derived, refer to the help text on the Query Construction Form for the field Derived.

Search Profile – Order By
This field allows selection of the Order By on which the display will be shown. The Order By options available are:-

- Description – The display will be shown in Description order. This is the default upon selecting this form.
- Entity – The display will be shown in Entity order
- Derived – The display will be shown in Derived order

Search Profile – Override SQL
This check box can be set on to search for Queries that have override SQL. It can also be set off to search for Queries that do not have override SQL. The default is both.

Query Construction Form

This form is used to construct a Query which is then processed to produce Result Sets. The Result Sets can then be selected where a Query Result Option has been made available for use, within another Query or for a GIS Query.

Queries can be constructed using the following Derived selections:-

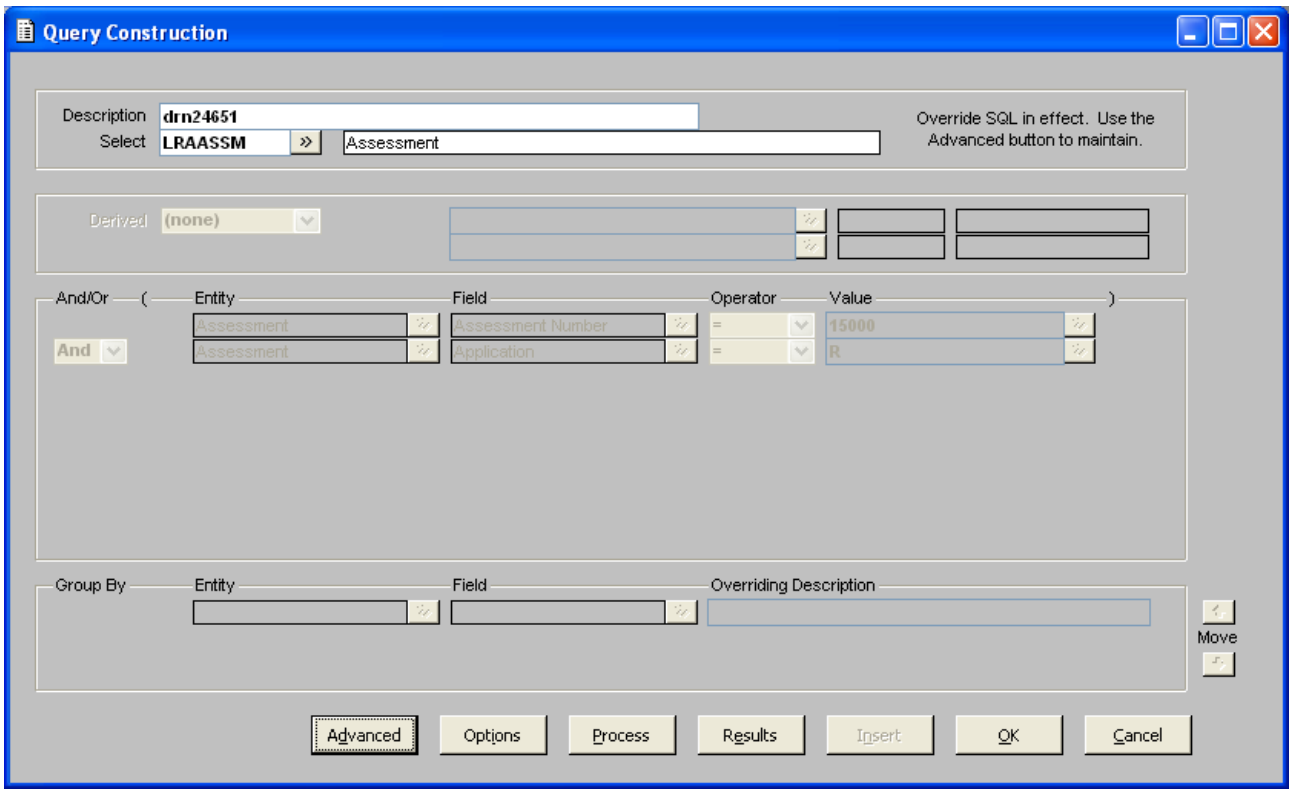
- **None**
  The Query is run using the data within the Entity nominated and the required records written out to a new Result Set

- **Based On** the Results of another Query
  The Query is run over the Result Set of another Query and the required records written out to a new Result Set

- **Union** of Results
  The Query is run over the Results of 2 Queries and combined into 1 new Result Set

- **Intersection** of Results
  The Query is run over the Results of 2 Queries and where the 2 Queries intersect (or match), the matched records are written out to a new Result Set

- **Difference** of Results
  The Query is run over the Results of 2 Queries and where the 2 Queries do NOT intersect (or match), the non matched records are written out to a new Result Set



Query Construction Form

Description

This field contains the query description. The field is maintainable. When entering in the Description of the Query make it informative of what the Query is actually going to achieve. This will make selection of the Query Result Sets easier for the user.

Select

This field allows the user to specify the entity to be used in the Query Result. e.g. if CRCRCPT is selected as the entity, then the Query Result will contain receipts. This also controls where the Result Sets can be used when using them within the Query Results Options within each of the modules. Entry into this field is mandatory.

Derived

There are 5 Derived Options available for use within the Query Construction Form. When creating a new Query the default for this field is (none). Using the Dropdown will allow you to select one of the other four options available. Depending on what Derived option is selected will then control what fields are displayed for use.

The Derived selections available are:-

- **(none)**

  A Query constructed using the (none) option creates the New Result Set based on the data within the Entity nominated in the Select field. The records written to the Result Set can be further refined by entering in Query Conditions in the And/Or Section of the form.

  When (none) has been selected then the Result 1 and Result 2 fields are dimmed and not available for entry or use. Additionally, any Entity can be defined in the Query Conditions section of the form.

- **Based On**

  A Query constructed using the Based On option creates the New Result Set based on records that are contained in a Result Set of another Query. The records written to the New Result Set can be further refined by entering in Query Conditions on the form.

  IF Based On has been selected then the Result 1 field and its Pop Up are available for use, the Result 2 field is dimmed and not available for use. Enter in the Result Set that is to be used as the basis for the new Query Result Set. The Pop Up can be used to display the available Results Sets.

Any Result Set can be used in the Result 1 field, it does not have to have been defined over the same Entity that is entered into the Select field on this form.

For example the Select entity could be LPAPROP and the Result Set nominated in the Result 1 field may have been created using the LANANML entity. This would then allow the newly created Result Set (which is defined over the LPAPROP entity) to be used within Property to display those Properties that have an Animal linked to them. Additionally the new Result Set could be further refined by adding Query Conditions. For example for those Animal Records contained in the Result 1 Result Set nominated, only report the properties of those Animals with a Status of Dead.

- **Union**

  A Query constructed using the Union option creates the New Result Set as a combination of the two Result Sets that have been nominated in the Result 1 and Result 2 fields. Where a record may exist in the Result 1 Set and also in the Result 2 Set, then it is only written out once to the New Result Set.

  If Union has been selected then the Result 1 and Result 2 fields are available for use. It is not possible to further refine the New Result Set as no Query Conditions can be entered into the form (this area of the form is dimmed).

  Additionally, when using the Union option the Select field and the Result 1 and Result 2 fields must refer to result sets for the same Entity. If the Select field has had an Entity entered into it, and the Result 1 or Result 2 fields Pop Ups are used, then only Result Sets for the Entity in the Select Field are displayed in the Pop Ups.

  A message will be displayed on the screen if the Select Entity, Result 1 and Result 2 fields do not use the same Entity. This message shows the Entities that have been nominated in the Select, the Result 1 and the Result 2 fields. For example 'The select entity, ACPMAST, the entity of the first result, LANANML, and the entity of the second result, LANANML, must all match.

- **Intersection**

  A Query constructed using the Intersection option creates a New Result Set containing only those records that appear in both the Result 1 and Result 2 Result Sets. Those records that are only in the Result 1 Set and not in the Result 2 Set or those records that are only in Result 2 Set and not in the Result 1 Set are ignored and not placed in the New Result Set.

  For example two Result Sets have been defined over the LANANML entity.

  The 1st Result Set contains Animals that are of Female Gender and has Animals 154, 160, 178, 190, 200 in its Result Set.

  The 2nd Result Set contains Animals that are a Breed of Terrier and has Animals 132, 160, 190, 201, 205 in its Result Set.

  When the Intersection Query is run using the above Result Sets, then only Animals 160 and 190 will be written out to the New Result Set as these are the only Animals that appear in both the nominated Result Sets.

  If Intersection has been selected then the Result 1 and Result 2 fields are available for use. It is not possible to further refine the New Result Set as no Query Conditions can be entered into the form (this area of the form is dimmed).

  Additionally, when using the Intersection option the Select field and the Result 1 and Result 2 fields must refer to Result Sets for the same Entity. Once the Select field has had an Entity entered into it, and the Result 1 or Result 2 fields Pop Ups are used then those Result Sets for the Entity in the Select Field are displayed in the Pop Ups.

  A message will be displayed on the screen if the Select Entity, Result 1 and Result 2 fields do not use the same Entity. This message shows the Entities that have been nominated in the Select, the Result 1 and the Result 2 fields. For example 'The select entity, ACPMAST, the entity of the first result, LANANML, and the entity of the second result, LANANML, must all match.

- **Difference**

A Query is constructed using the Difference option creates a New Result Set containing only those records that do not appear in both the Result 1 and Result 2 Result Sets. Those records that are only in the Result 1 Set and not in the Result 2 Set or those records that are only in Result 2 Set and not in the Result 1 Set are written to the New Result Set. Those records that were in both Result 1 and Result 2 Sets are ignored.

For example two Result Sets have been defined over the LANANML entity.

The 1st Result Set contains Animals that are of Female Gender and has Animals 154, 160, 178, 190, 200 in its Result Set.

The 2nd Result Set contains Animals that are a Breed of Terrier and has Animals 132, 160, 190, 201, 205 in its Result Set.

When the Difference Query is run using the above Result Sets, then only Animals 132, 154, 178, 200, 201 and 205 will be written out to the New Result Set as these are the only Animals that do not appear in both the nominated Result Sets.

If Difference has been selected then the Result 1 and Result 2 fields are available for use. It is not possible to further refine the New Result Set as no Query Conditions can be entered into the form (this area of the form is dimmed).

Additionally, when using the Difference option the Select field and the Result 1 and Result 2 fields must refer to Result Sets for the same Entity. Once the Select field has had an Entity entered into it, and the Result 1 or Result 2 fields Pop Ups are used then only Result Sets for the Entity in the Select Field are displayed in the Pop Ups.

A message will be displayed on the screen if the Select Entity, Result 1 and Result 2 fields do not use the same Entity. This message shows the Entities that have been nominated in the Select, the Result 1 and the Result 2 fields. For example 'The select entity, ACPMAST, the entity of the first result, LANANML, and the entity of the second result, LANANML, must all match.

Result 1

If a Result 1 Result Set is to be used in the Query Construction, then enter in the Description of the Result Set to be used. If the Description is not known then the Pop Up can be used to display a list of the available Result Sets.

Once the Result 1 Result Set has been entered then the Date/Time that the Result Set was created and the Entity that was Selected for the creation of the Result Set are displayed next to the Description of the Result Set selected.

This field is only available for entry if the Derived option has been set to either Based On, Union, Intersection or Difference.

Result 2

If a Result 2 Result Set is to be used in the Query Construction, then enter in the Description of the Result Set to be used. If the Description is not known then the Pop Up can be used to display a list of the available Result Sets.

Once the Result 2 Result Set has been entered then the Date/Time that the Result Set was created and the Entity that was Selected for the creation of the Result Set are displayed next to the Description of the Result Set selected.

This field is only available for entry if the Derived option has been set to either Union, Intersection or Difference.

Parentheses

These fields contain left and right parentheses. The parenthesis may be selected by clicking in the field and pressing the space bar, or by typing the appropriate parenthesis into the field.

Parentheses are optional if only one criterion is entered. If AND/OR operators are used to join criteria, then parentheses may need to be used. Where two different operators are used, the conditions that they apply may need to be bracketed together to make clear the order in which the operators should be applied.

This field is dimmed and cannot be used if the Derived option has been set to either Union, Intersection or Difference.

Entity
Select from the pop up the entity which contains the field required to establish the query criterion. The description is then defaulted into the field. All entities are available for selection.

This field is dimmed and cannot be used if the Derived option has been set to either Union, Intersection or Difference.

Field
Select the field to include in the query criteria. The fields available for selection will be those fields contained within the selected entity.

This field is dimmed and cannot be used if the Derived option has been set to either Union, Intersection or Difference.

Operator
Select an operator from the drop down list. The available options are: =, >=, >, <=, <, <>, Like, Not Like, Null, Not Null.

This field is dimmed and cannot be used if the Derived option has been set to either Union, Intersection or Difference.

Value
Enter a value to be operated on. Text, Numeric data and wildcard characters can be used. There is no need to enclose text in quotation marks. Selection can be made via the pop up if available for the field.

This field is dimmed and cannot be used if the Derived option has been set to either Union, Intersection or Difference.

And/Or Operator
If more than one criterion is to be included in the query, they can be joined using the AND or OR operators. AND specifies that both criteria need to be met, while OR requires that either criterion must be met.

This field is dimmed and cannot be used if the Derived option has been set to either Union, Intersection or Difference.

Process Button
Select this button to process the query and produce a set of results. These results can be retrieved by selecting the Results Button. Previously saved result sets will also display.

Results Button
Select this button to view the saved results of the query. The query must first be processed to produce a set of results.

Insert Button
Select this button to insert a new criterion line in the query construction. The AND operator will default into the operator field, however this can be changed to OR if desired.

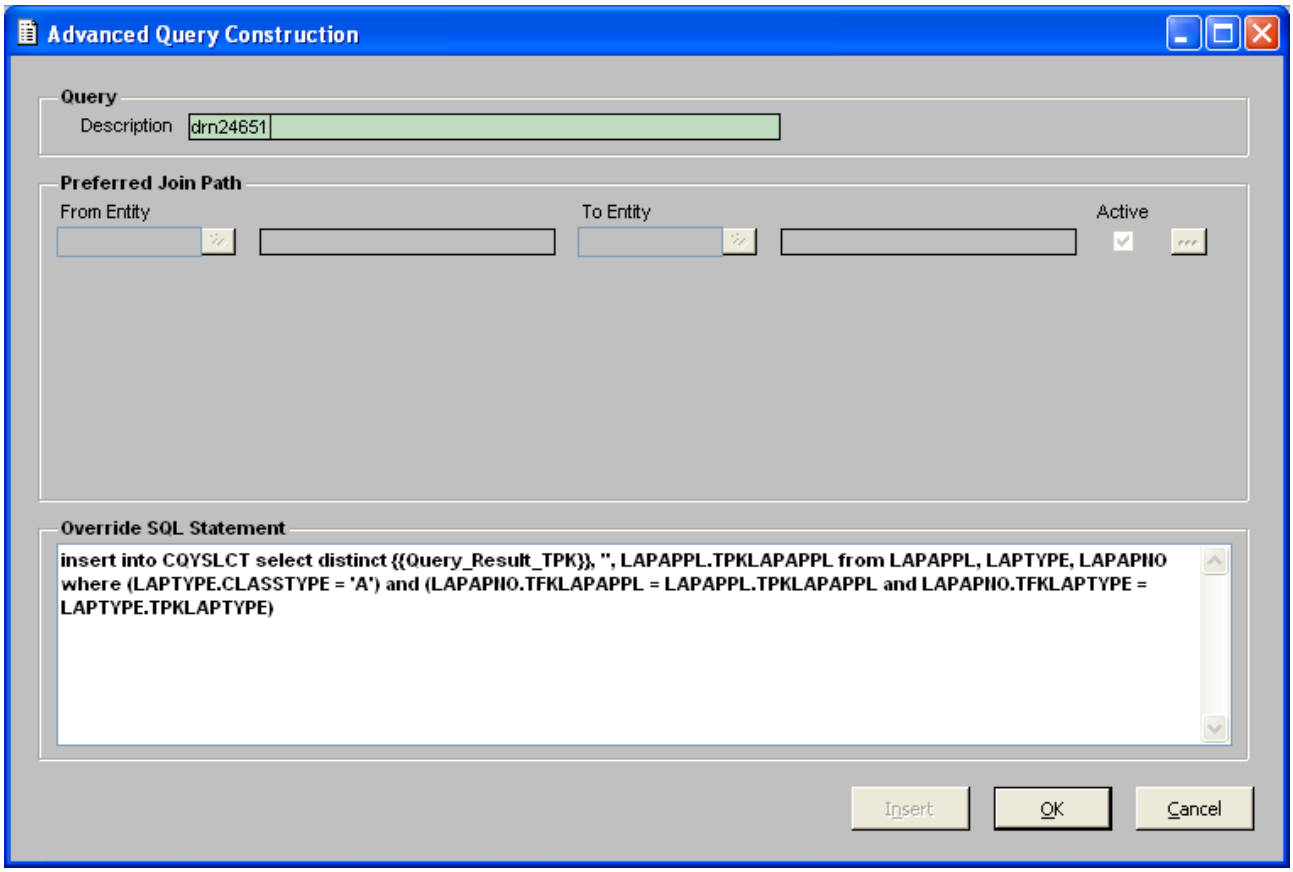
Advanced Button
Select this button to go to the Advanced Query Construction form to override the SQL.

Advanced Query Construction Form

This form is used for two purposes:
1. Allows preferred join paths to be nominated for an individual Query.
   This is important when the Query Engine has to choose from multiple join paths (relationships) between entities and the choice which it makes does not produce the desired result.

It is recommended that this feature is only used when the Query Engine does not automatically determine the desired join path.

2. Provides the ability to specify an Override SQL Statement for a Query if required.
   This is done by creating a new Query and entering a minimum of the description and entity to select for the results and then going to the Advanced Query Construction form to edit the SQL.



Advanced Query construction form

Description
This field displays the Description of the Query and is not maintainable.

Preferred Join Path – From Entity

Select an Entity to make a join from.

Preferred Join Path – To Entity

Select an Entity to make a join to.

Preferred Join Path – Active
This check box indicates if the join entered is Active.

Preferred Join Path – Details
Press this button to navigate to the Query Path Links Maintenance form where the required number of links between the entities that define the join path to be entered.

Override SQL Statement
The SQL that the Query defined on the previous form is defaulted into the Override SQL Statement field. When this value is defaulted it has a grey background. When overridden it has a normal edit field background.

To make the task easier it is recommended that as much of the Query is specified on the previous form in the normal way to minimise the amount of editing to the Override SQL Statement.

This is especially important if a Query for a MyPathway dashboard part that requires a minimum of one Group By field to be specified is being constructed. The syntax for this is quite complex.

The Advanced Query Construction form also has the Substitution Tokens available from a right mouse click on the Override SQL Statement field.

It is important to place the Substitution Token in the correct place in the Override SQL Statement field. When you click on one of the tokens on the menu it will be inserted at the current cursor position within the field.

If any text of the SQL statement is highlighted that text will be replaced by the token.

Note that an additional token called Query Result TPK is available on this form. This token is placed in the default value of the SQL Statement field in the correct place so normally will not be required to be inserted via the context menu.

Substitution Token Expressions

Substitution Tokens are surrounded by double curly brackets, for example: {{Current_User_ID}}. If it is necessary to include a literal value of opening or closing double curly brackets it is possible to enter three curly brackets. This applies inside or outside a Substitution Token surrounded by double curly brackets. {{{ always becomes a literal {{ and }}}always becomes a literal }}.

The existing Substitution Token Expressions remain possible. As a reminder some examples are:

- {{Current_Date - 30}}
  Results in the current date less 30 days
- {{Current_DateTime + 5s}}
  Results in the current date/time plus 5 seconds
- {{Current_Time + 1n}}
  Results in the current time plus 1 minute
- {{Current_Time + 1n1s}}
  Results in the current time plus 1 minute and 1 second.
- {{Current_DateTime +12h}}
  Results in the current date/time plus 12 hours
- {{Current_Date + 7d}}
  Results in the current date plus 7 days

Additional flexibility has been added to Substitution Token Expressions. Previously the order of the expression was important for it to work and the expression could only work with single calculations.

The order is no longer important so for example {{7d + Current_Date}} would not have been successful previously but will be now.

Also an expression that contains multiple calculation parts is now possible. For example the following will now be successful {{12h + Current_DateTime +30n}}. Also if it makes sense to do so multiple substitution tokens can now be used in a single expression.

It is important to consider data types when performing SQL statements over a database. For different brands of database the syntax can be subtly different for some data types and will not be successful if the syntax is not correct.

Standalone Substitution Tokens vs. Substitution Token Expressions

The examples above for Override SQL Statements show what is necessary for standalone Substitution Tokens. When a calculation is performed in an expression such as {{Current_Date - 30d}} the Query Engine is not able to automatically determine the data type of the result in all scenarios.

As a result for Override SQL Statements it may be necessary to explicitly specify the data type to enable the correct syntax for the evaluated SQL statement that gets executed. Please note that this requirement does not apply to Queries without Override SQL Statements.

To specify a data type for a Substitution Token Expression a type function must be used within the token and surrounding the expression. For example {{$datim(12h + Current_DateTime +30n)}}.

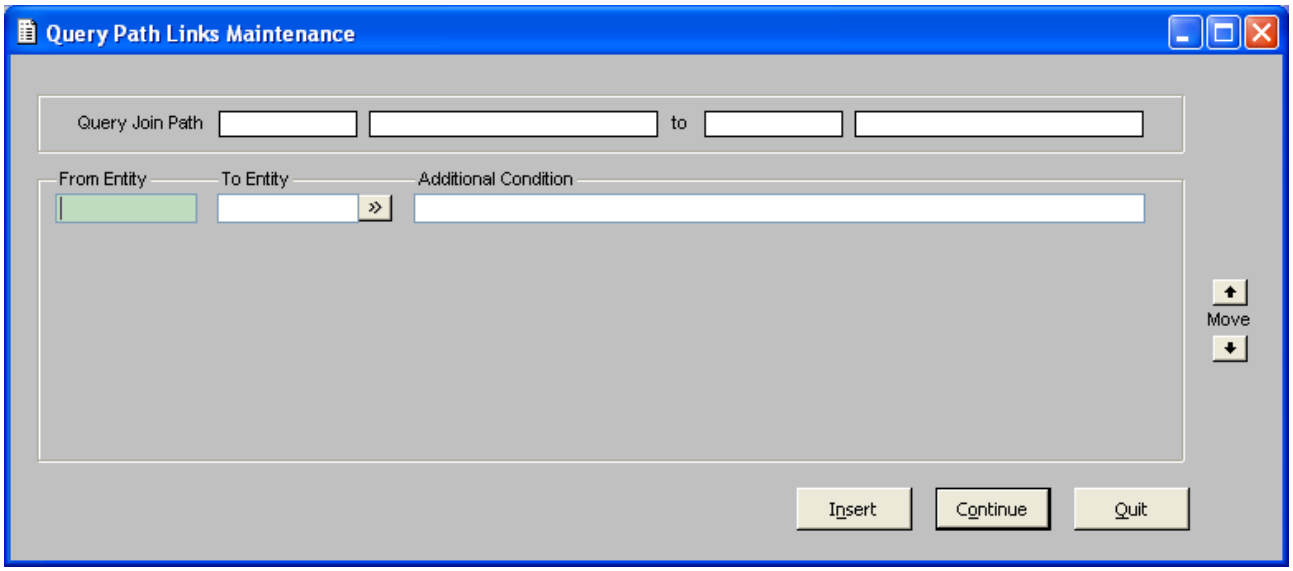
The following table shows the available type functions:

Required Data Type	Data Type Function
Boolean	$boolean()
Time Only	$time()
Date Only	$date()
Combined Date and Time	$datim()
Numeric	$number()
String	$string()

Using no type function is the equivalent of specifying the $string() function.

Query Path Links Maintenance Form

This form is used to enter the required number of links between the entities that define the join path to be entered.



Query Path Links Maintenance form

Query Join Path

These fields display the Query Join Path specified and are not maintainable.

From Entity

This field displays the From Entity specified.

To Entity

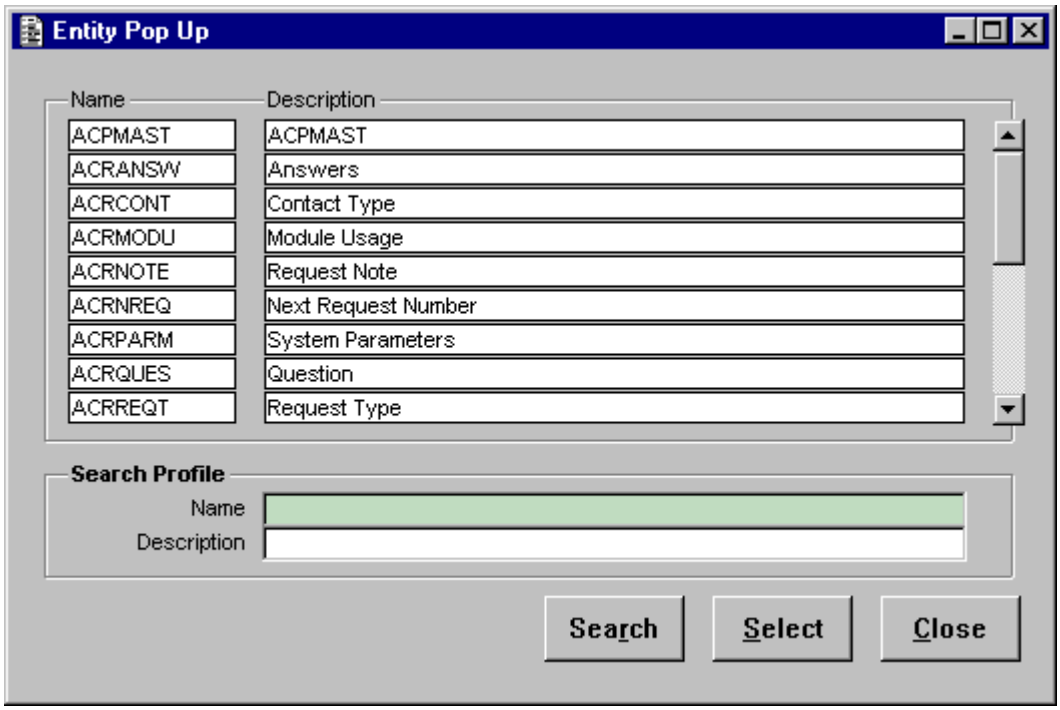
Enter or select from the Pop Up the To Entity.

Additional Condition

The Additional Condition field is only required to be entered where an additional join condition is required. It can be useful for example when defining a join path for a role table, but the preferred method is to specify this condition back on the Query Maintenance form.

An example of an Additional Condition might be a join between LRAASSM – Rates Assessment and CNAROLE – Name Role

Entity Pop Up Form



Entity Pop Up Form

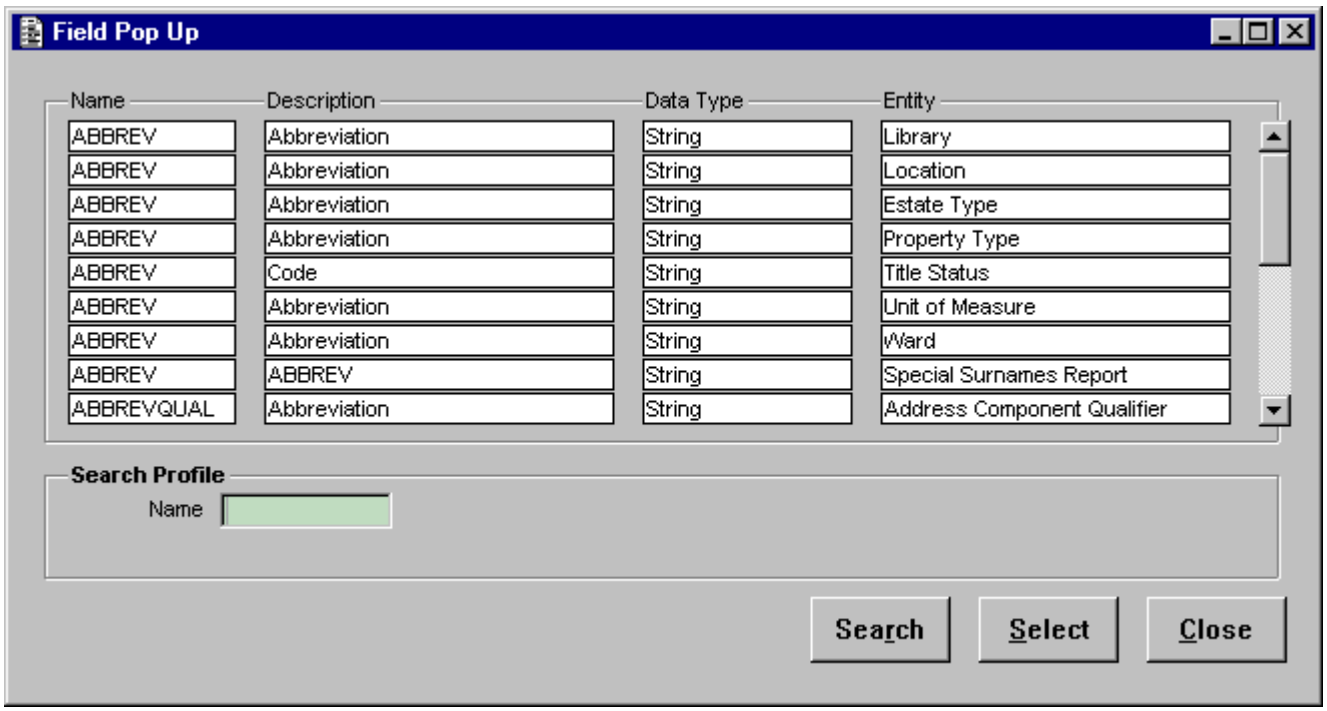
Name
This field displays the entity name. This field is display only and may not be maintained.

Description
This field displays the entity description. This field is display only and may not be maintained.

Search Profile - Name
Enter an entity name on which to base your search. Wildcard searching is available on this field.

Search Profile - Description
Enter an entity description on which to base your search. Wildcard searching is available on this field.

Field Pop Up Form



Field Pop Up Form

Name
This field displays the field name. Only those fields contained within the selected entity will be listed. This field is display only and may not be maintained.

To select a field, highlight the field and choose the Select Button.

Description
This field displays the field description. This field is display only and may not be maintained.

To select a field, highlight the field and choose the Select Button.

Data Type
This field displays the data type for the field i.e. String, Numeric, Date/Time, Boolean. This field is display only and may not be maintained.

To select a field, highlight the field and choose the Select Button.

Entity
This field displays the entity to which the field belongs. This field is display only and may not be maintained.

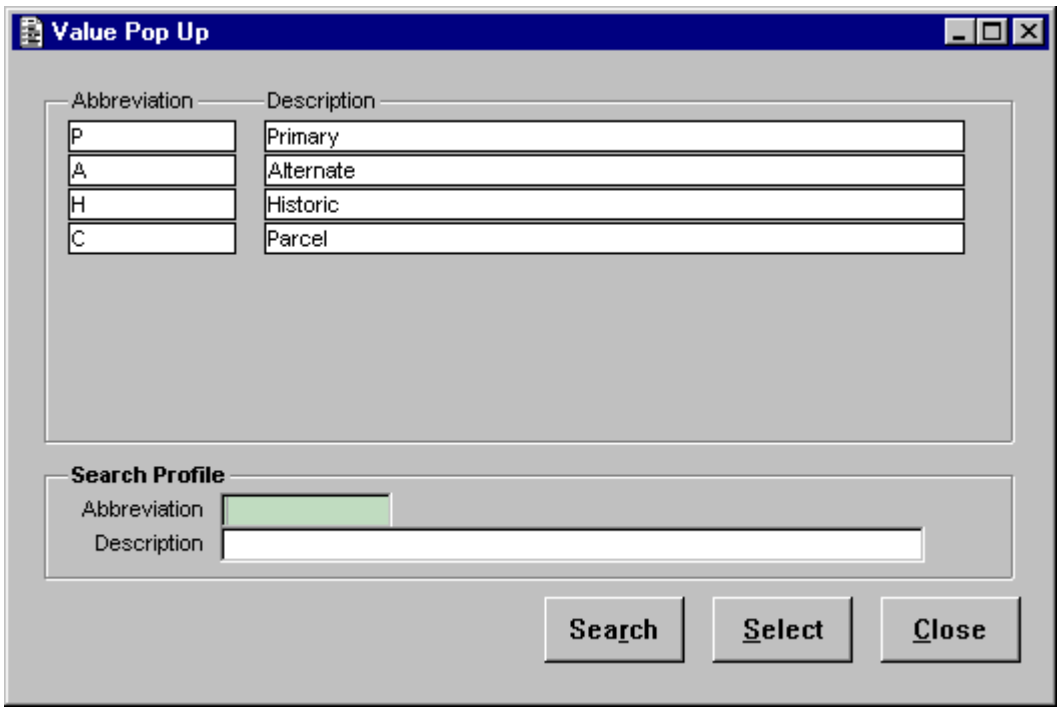
To select a field, highlight the field and choose the Select Button.

Search Profile - Name
Enter a field name on which to base your search. Wildcard searching is available on this field.

Search Profile - Description
Enter a field description on which to base your search. Wildcard searching is available on this field.

Value Pop Up Form

This form becomes available if there are predefined values from which to make a selection.



Value Pop Up Form

Abbreviation
This field contains the value code for any predefined values. This field is display only and may not be maintained.

Description
This field contains the value description. This field is display only and may not be maintained.

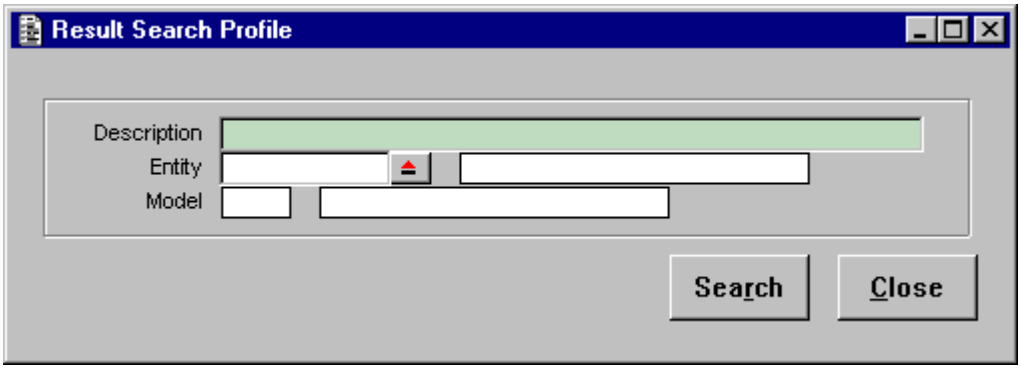
Search Profile - Abbreviation
Enter a value code on which to base your search and select the Search Button to perform the search. Wildcard searching is available on this field.

Search Profile - Description
Enter a value description on which to base your search, and select the Search Button to perform the search. Wildcard searching is available on this field.

Result Maintenance

The Result Maintenance section provides information on retrieving and maintaining a set of query results. Whenever a query is processed, a result set is produced. Each result set can be selected and used for searching or reporting within other applications.

Result Search Profile Form



Result Search Profile Form

Description
Enter a result description on which to base your search. Wildcard searching is available on this field. If this is combined with an entity search, then the entity search overrides the description. Searching on both fields is not available.

Entity

Enter an entity on which to base your search, or select one from the pop up. Searching cannot be done on description and entity together. Wildcard searching is available on this field.

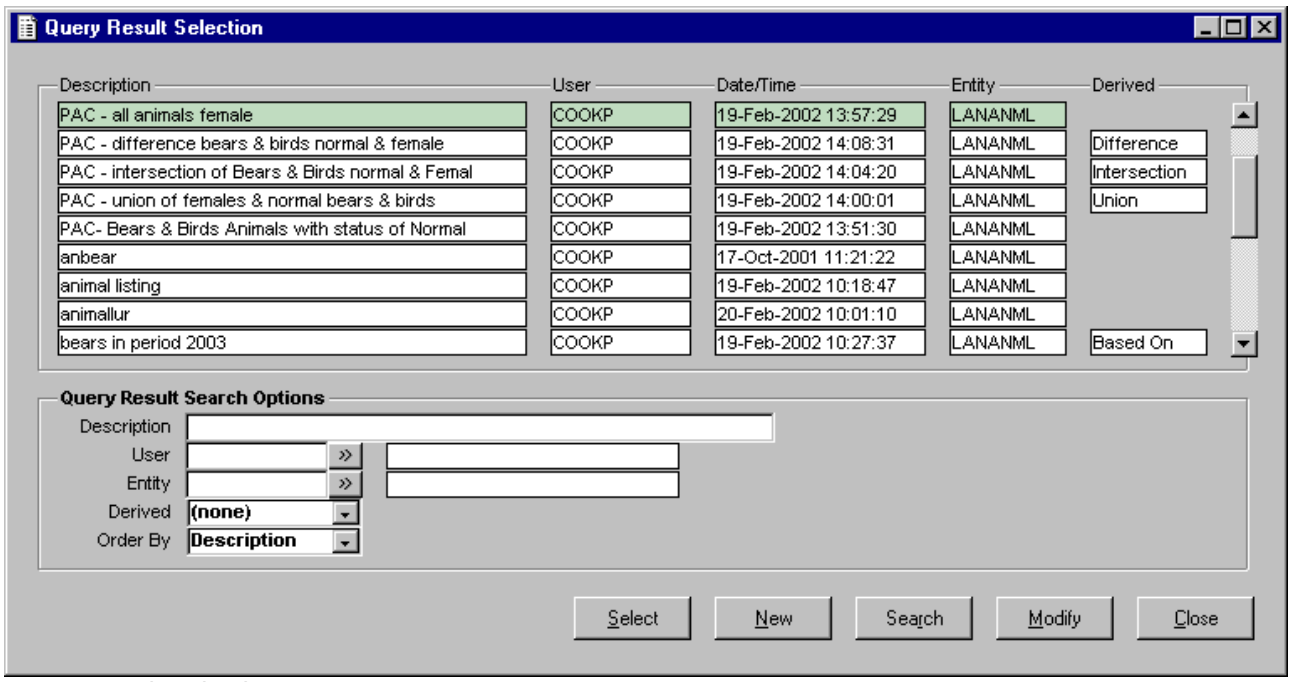
Model

This field displays the model name and description when an entity is selected.

Query Result Selection Form

The Query Result Selection Form displays those Query Results that have been created and are available for use within Query Construction, Display Query on GIS and within the Query Result Options available within the different Modules.

It displays the Description of the Result, who created the Result, the Date/Time that the Result was created, the Entity that the Result was run over and how the Result was Derived.



Query Result Selection Form

Description
This field displays the description of the saved query result which is available for selection.

User
This field displays the User ID of the person who created the query result.

Date/Time
This field displays the date and time at which the query result was created.

Entity
The Entity that was selected at the time that the Result Set was created is shown in this field.

Derived
The Derived field shows how the Query Result was arrived at.

If Based On is shown then the Query Result was created using another Query's Result Set.
If Union is shown then the Query Result was created by combining the Result Sets of 2 Queries.
If Intersection is shown then the Query Result was created by combining the Result Sets of 2 Queries and where records were found to be in both Results Sets they were written to the new Result Set.
If Difference is shown then the Query Result was created by combining the Result Sets of 2 Queries and records were found to only be in one of the Results Sets they were written to the new Result Set.
If the field is blank then they Query Result was created using the entries in the Selected Entity.

For more information on how the Derived field works, refer to the help text associated to the Derived Field on the Query Construction Form.

Query Result Search Options – Description
This field allows a query result description to be entered on which to base a search.

Query Result Search Options –User

These fields allow a User Id to be entered on which to base a search. Alternatively, a selection can be made from the Pop Up.

Query Result Search Options –Entity

These fields allow an Entity to be entered on which to base a search. Alternatively, a selection can be made from the Pop Up.

Query Result Search Options –Derived
This field allows selection of the Derived options on which to base a search. The Derived options available are:-

- (none) – This will show all Query Results
- Based On – This will only show those Query Results that have been created with the Derived option set to Based On.
- Union – This will only show those Query Results that have been created with the Derived option set to Union.
- Intersection – This will only show those Query Results that have been created with the Derived option set to Intersection.
- Difference – This will only show those Query Results that have been created with the Derived option set to Difference.

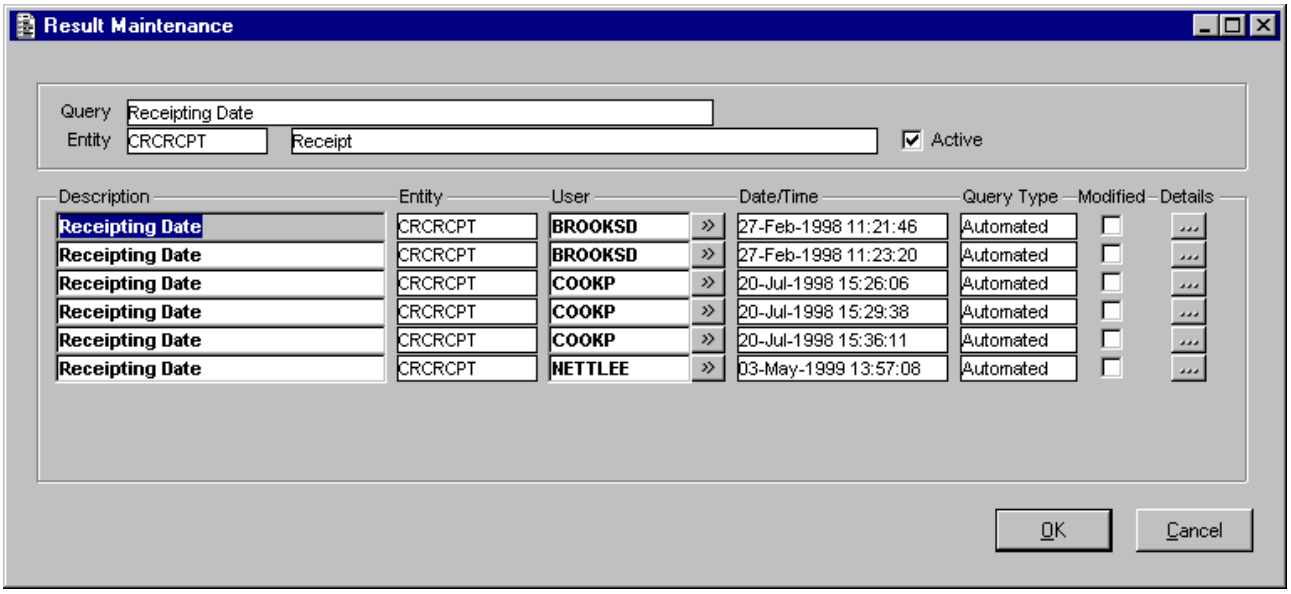
For more information on the use of Derived, refer to the help text on the Query Construction Form for the field Derived.

Query Result Search Options –Order By
This field allows selection of the Order By on which the display will be shown. The Order By options available are:-

- Description – The display will be shown in Description order. This is the default upon selecting this form.
- User – The display will be shown in User order
- Date/Time – The display will be shown in Date/Time order
- Entity – The display will be shown in Entity order
- Derived – The display will be shown in Derived order

Result Maintenance Form

This form displays the result sets for the selected processed query. Each time a query is processed a result set is created. Further details for each set are available via the detail buttons.



Result Maintenance Form

Query
This field displays the query name. This field is display only and may not be maintained.

Entity
These fields display the entity name and description on which the query results will be based.

Active
This field will be checked on if the application has been made active in Query Model Maintenance.

Description
This field contains a description of the results set. The query description is defaulted into this field, however, it can be maintained and given a unique identifier.

Entity
These fields display the entity details to be used for the query result.

User
This field displays the User established when the query was processed.

Date/Time
This field displays the Date and Time at which the query was processed.

Query Type
This field displays the Query type. The options available are:
- Automated
- External

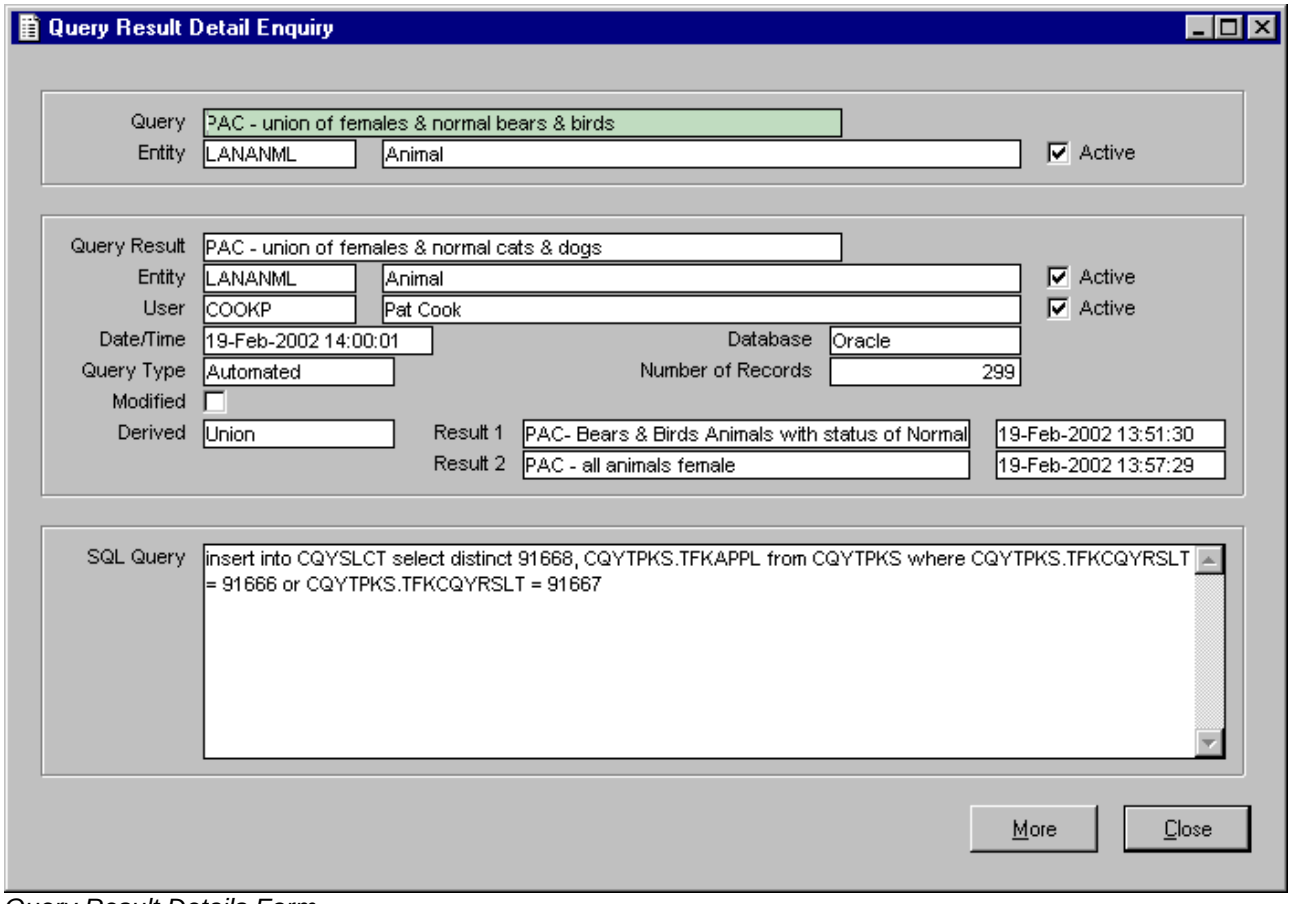
Modified
The Modify flag will be checked on if the query has been modified and the Modified flag has been checked on in Result Maintenance.

Detail Button
Selection of the Detail Button displays the Query Result Detail Maintenance form which provides further details on the result set.

Query Result Detail Enquiry Form

The Query Results Detail Form provides further details on the Query result. This form is display only and cannot be maintained.

For some Query Results it is possible to select the More Button to show the actual records that have been written into the Query Result Set.



Query Result Details Form

Query
The Query field displays the query name. This field is display only and may not be maintained.

Entity
The Entity fields display the name and description of the entity on which the query is based. This field is display only and may not be maintained.

Active
The Active checkbox will be checked on if the entity has been made active in the parameters set up. This field is display only and may not be maintained.

Query Result
The Query Result field displays the query result name. This field is display only and may not be maintained.

Entity
The Entity fields display the name and description of the entity to be used in the query result. This field is display only and may not be maintained.

Active
The Active field will be checked on if the query result entity has been made active. This field is display only and may not be maintained.

User
The User fields display details of the user who processed the query. This field is display only and may not be maintained.

Active
The Active field will be checked on if the User has been made active. This field is display only and may not be maintained.

Date/Time
The Date/Time field displays the date and time at which the query was processed. This field is display only and may not be maintained.

Database
The Database field displays the database selection made in Parameter Maintenance, for example Oracle. This field is display only and may not be maintained.

Query Type
The Query Type shows how the Query Results were created. For example if the word 'Automated' appears then the Query Result was created via the Query module. If the word 'External' is displayed then the Query Result was created via an external application outside of Pathway i.e. a GIS product.

Number of Records
This field displays the number of records found to match the query criteria. This field is display only and may not be maintained.

Modified
The Modify flag will be checked on if the query has been modified and the Modified flag has been checked on in Result Maintenance.

Derived
The Derived field displayed what the value of the Derived was when the Query Result was created. The following values can be shown in this field.

- (none)
- Based On
- Union
- Intersection
- Difference

Result 1
If the Derived value is either Based On, Union, Intersection or Difference then the Query Result that was nominated as the Result Set to use will be displayed in this field. It will also show the Date/Time that the nominated Result Set was created.

This field will no display if the Derived value is (none).

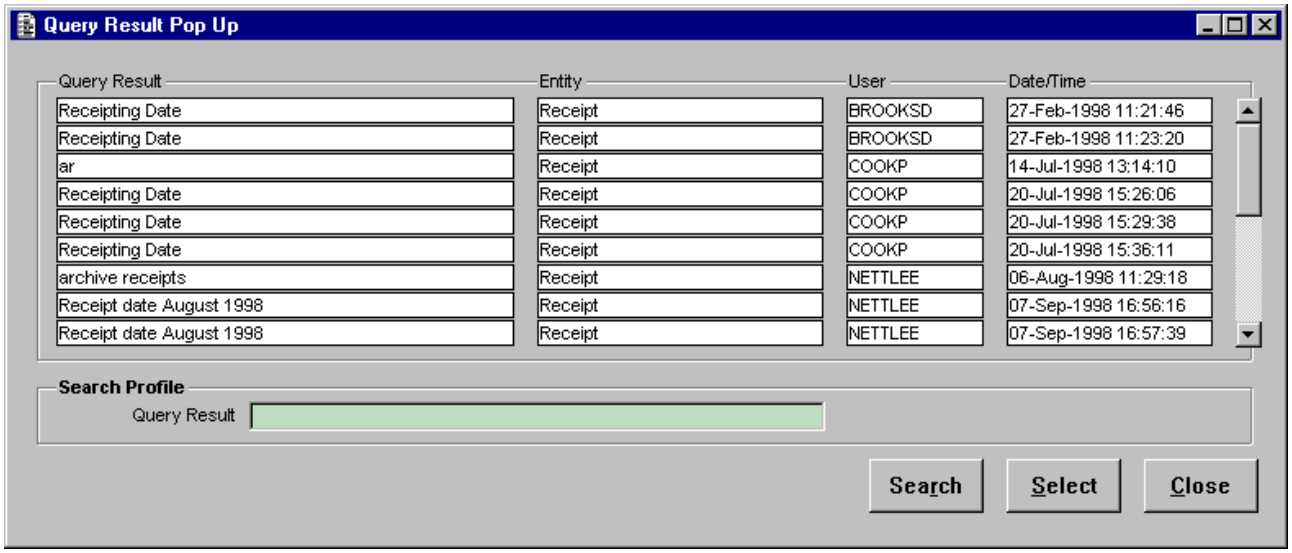
Result 2
If the Derived value is either Union, Intersection or Difference then the Query Result that was nominated as the Result Set to use will be displayed in this field. It will also show the Date/Time that the nominated Result Set was created.

This field will no display if the Derived value is (none).

SQL Query
This field displays the SQL Query statement. Double-click on the field to initiate Zoom mode, which allows better viewing of the details. This field is display only and may not be maintained.

More Button
Selection of the More Button displays the Query Result Details Form which displays the result of the query and allows selection of further records for inclusion in the Query Result.

Query Result Pop Up Form



Query Result Pop Up Form

Query Result
The Query Result field displays the query result description. This field is display only and may not be maintained.

Entity
The Entity field displays the entity used in the query result. This field is display only and may not be maintained.

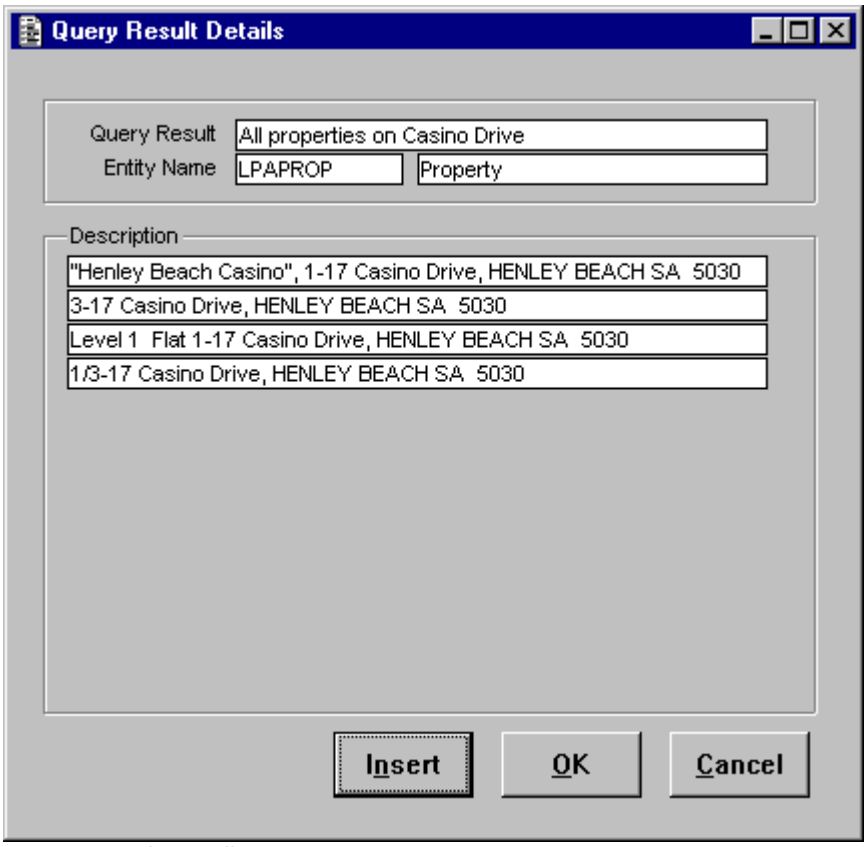
User
The User field displays the user ID of the person who processed the query. This field is display only and may not be maintained.

Date/Time
The Date/Time field displays the date and time at which the query was processed. This field is display only and may not be maintained.

Search Profile - Query Result
This field may be used to enter a query result description on which to conduct a search. Wildcard searching is available on this field.

Query Result Details Form

This form displays the results of the query. Selecting the Insert button allows the user to further select records for inclusion in the query result.



Query Result Details Form

Query Result
This field displays the selected Query Result description.

Entity Name
These fields display the Entity which is used in the Query Result.

Description
This field displays the records which form part of the Query Result.

Insert Button
Selection of the Insert Button will allow further records to be included in the Query Result Set.

Export / Import Entity Control

The Export/Import Entity Control Chapter describes the forms and fields related to export and import control. Further details are provides in the following sections:

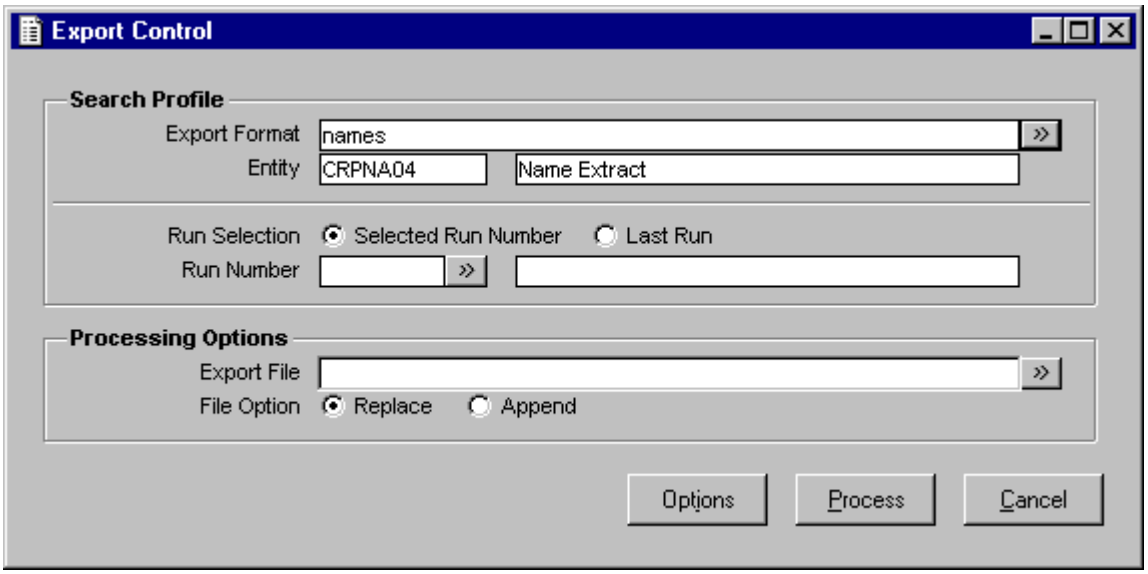
Export Entity Control
Import Entity Control

Export Entity Control

The Export Entity Control section provides information on exporting data to a file using an export format.

Export Entity Control Form

This form allows data to be exported to a file using an export format. The data can replace the existing data in the file or be appended to the existing data.



Export Entity Control Form

Search Profile - Export Format
The field can be used to specify an export format by selecting from the pop ups.

Search Profile - Entity
Once the export format has been selected, the entity name and description will default into these fields. These fields are display only and may not be maintained.

Run Selection
The Run Selection allows selection of a particular Run Number or the Last Run created. When Selected Run Number is nominated the Run Number field and Pop Up are available to allow selection of the Run Number required.

When the Run Selection is focused on Last Run the Run Number field and the Pop Up are dimmed and not able to be selected. The Last Run is particularly useful if you are using this Export process as a scheduled end of day function.

Run Number
The Run Number field allows the user to select a submitted job run number from the pop up, to further specify the export data.

Processing Options - Export File
The field allows the user to enter a path and filename to which to export the data, or to make a selection via the pop up.

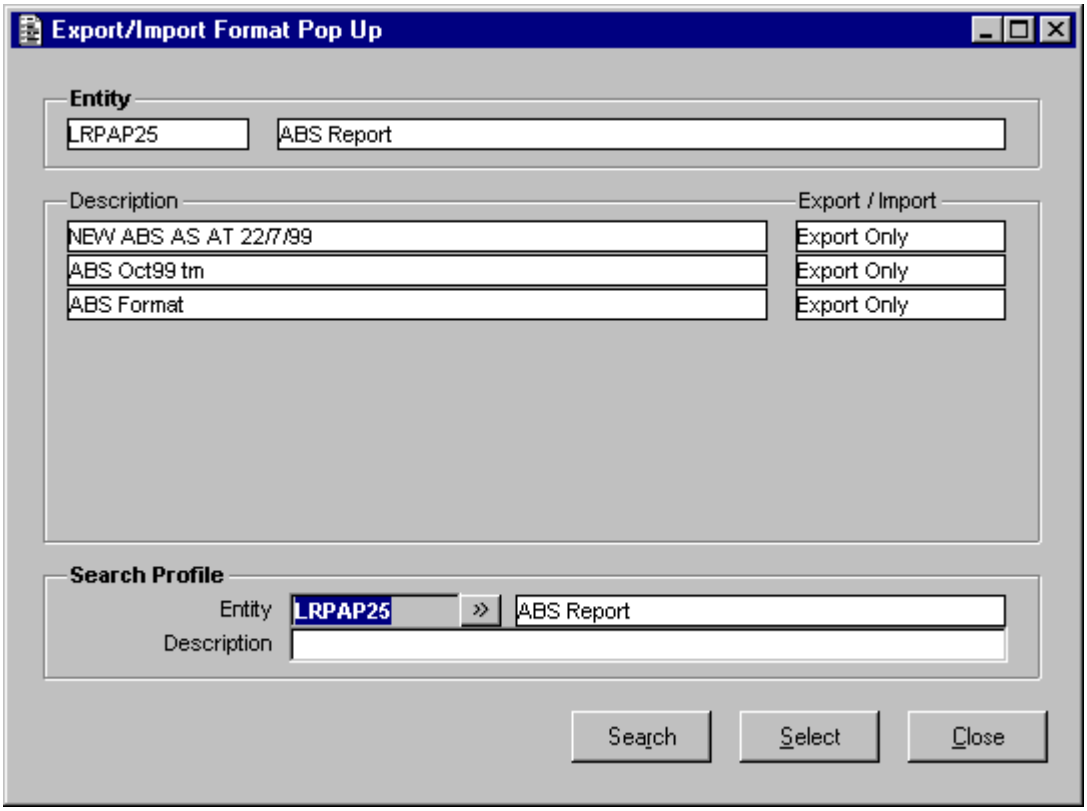
File Option
Two options are available for exporting the data to a file:
- Replace

- Append

The Replace option will replace any existing data in the export file if it exists or create a new file if it doesn't exist.

The Append option will append any new data to the existing data in the export file. If the file does not exist, it will be created.

Export/Import Format Pop Up Form



Export/Import Format Pop Up Form

Entity

These fields display the entity and entity description used in the Export/Import Format. This field is display only and may not be maintained.

Description

The Description field displays the description of the Export/Import format. This field is display only and may not be maintained.

Export/Import

This field displays whether the format is export only, import only or both, as set up in the Format Maintenance Parameters. This field is display only and may not be maintained.

Search Profile - Entity

The entity displaying at the top of this form is defaulted into this field. An alternative entity may be entered or selected from the pop up, and a search initiated via the Search button. Wildcard searching is available on this field.

Search Profile - Description

An export/import format description may be entered into this field and a search initiated via the Search Button. Wildcard searching is available on this field. Searching on both the Entity and Description fields together is also available.

Import Entity Control

The Import Entity Control section provides information on importing data from an external file using an import format.

Import Entity Control Form

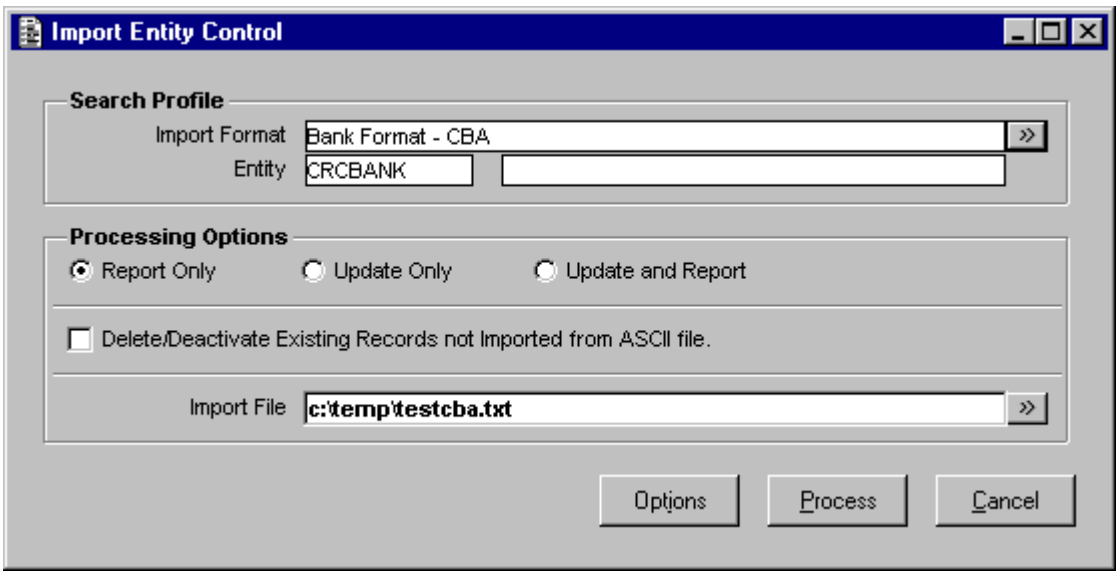
This form allows data to be imported into the database, using an import format, from an import ASCII file.

This form is accessed via the Query Menu – Import Entity Control.

This form will also be displayed when the Project Code Import menu item under General Ledger Interface is selected. (The form title will read Project Code Import Entity Control)

This form will also be displayed if the Rebate Matching Report (Rates Module) is selected. When selecting either the Centrelink option or the Veterans Affairs option, this form will be displayed but will be titled "Centrelink Rebate Matching Import Control Form" or Veteran Affairs Rebate Matching Control Form". An Import Format must have been established using the entity LRAICTR prior to running this option.

This form will also be displayed when the Debtor Import menu item under the Accounts Receivable Interface is selected. (The form title will read Debtor Master Record Import Entity Control). An Import Parameter Format must have been established using the entity CARDBTR prior to running this option. When selected from the Debtor Import menu item it allows the importing of Debtor Accounts from an external Financial System.



Import Entity Control Form

Search Profile - Import Format

The field allows the user to specify an import format by selecting from the pop ups.

Search Profile - Entity

Once the import format has been selected, the entity name and description will default into these fields. These fields are display only and may not be maintained.

Processing Options

The processing options available are:

- Report Only
- Update Only
- Update and Report

The Report Only Option will produce a report that may be sent to a selected printer. The database will not be updated.
The Update Only option will add the records to the database without any reporting.
The Update and Report Option will update the database as well as producing a report

(If Project Codes are being imported then only the “Update Only” option is available)
(If Debtor Master records are being imported then only the “Update Only” option is available)
(If using the Rebate Matching Report then only the ‘Report Only’ option is available)

Delete/Deactivate Existing Records not imported from ASCII file
If this box is checked on any existing records within the Pathway database that do not appear in the Import File will be deleted or made “Inactive”.

If the box is checked off then all codes will remain after the import.

Import File
This field allows the user to enter the path and name of the file from which the import data is to be obtained. Alternatively, a selection can be made via the pop up.