Microsoft Dynamics SL

Quick Query

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Contents

Introduction

Quick Query Overview

Quick Query in Microsoft Dynamics® SL gives users a tool to query the Microsoft Dynamics SL databases, returning data in a grid. You can view, filter, sort, add or remove columns, and export the resulting data to Microsoft Excel. You can use the standard queries provided in Microsoft Dynamics SL, create variations of these base queries, or create additional custom queries that you can deploy. You can deploy queries within your company to a single user, a department, or make the queries available to all Microsoft Dynamics SL users. This module provides the flexibility to control access to information on a query-by-query basis by using *Access Rights Maintenance* (95.270.00) to restrict the user's access to queries that are relevant to their role within the company.

User's Guide Overview

This user's guide provides information about the setup and use of the Quick Query module. Reviewing the user's guide can help you make informed decisions about the implementation of the Quick Query module in your business.

What is Covered in the User's Guide?

The user's guide consists primarily of procedures and checklists that describe how to perform the various tasks featured in the Quick Query module. The user's guide also contains topics that help you become better acquainted with the capabilities of the module. Topics are arranged in a logical order that builds on information previously presented in other Microsoft Dynamics SL user's guides.

Who Should Use the User's Guide?

The user's guide is designed for readers who are new to Microsoft Dynamics SL. The guide provides the information that you need for making decisions about how to use the Quick Query module to benefit the most from your system.

How to Use the User's Guide

Read the appropriate section of the user's guide before you continue with any system customizations. The user's guide presents the procedures and steps required for completing the various customization processes. To help you locate information, the user's guide contains:

- A table of contents of logically organized activities and tasks.
- An alphabetized "Quick Reference Task List" of frequently performed tasks.
- An alphabetized index of the information that is provided in the user's guide.

Quick Reference Task List

This list contains tasks that are frequently performed by using the Quick Query module. Each task is cross-referenced to a specific page in the user's guide.

How Do I Add...?

- A Base Query View to a menu — see "Add the Base Query View to the menu" on page 46.

How Do I Assign...?

- Access Rights to a Base Query View — see "Assign Access Rights to the Base Query View" on page 46.

How Do I Change...?

- The order of columns in a view — see "Reorder Columns" on page 10.
- The columns that display in a view — see "Remove Columns" and "Restore Columns" on page 11.
- The sort order in a view— see "Change the Sort Order" on page 12.

How Do I Create...?

- A Filtered Query View — see "Creating and Working with Filtered Query Views" on page 18.
- A new Base Query View — see "Create a Base Query View" on page 43.
- A new SSRS report from an Existing Query — see "Creating an SSRS Report by using a Query" on page 24.

How Do I Export...?

- To Microsoft Excel — see "Export to Microsoft Excel" on page 13.

How Do I Launch...?

- A Drill down program — see "Open a drill down program" on page 13.

How Do I Perform...?

- A filter search — see "Perform a filtered search" on page 12.

Concepts: How This Module Works

Quick Query is Microsoft Dynamics SL's immediate query solution and is targeted for two distinct kinds of users: the end-users and the expert users. End-users will view, sort, export, and so on, from existing queries by using the runtime version of *Quick Query Viewer* (QQ.VIE.00). Expert users will change existing base query views or create new base query views by using *Quick Query Viewer* (QQ.VIE.00) in maintenance mode. This document refers to the end-users as "Users" and the expert users as "Developers."

The Base Query View points to an SQL Query View and contains information that is required to display that view in Quick Query. Filtered Query Views refer to the result of a user changing a Base Query View by applying filters, sorting, and columns specifications (hiding, ordering, naming). The Filtered Query View has its own name, description, and is typically a subset of the Base Query View columns or records.

Settings in the Solomon.ini file are available to control Paging, maximum total number of rows, number of rows displayed in the grid, and time-out settings. See the Appendix A: Solomon.ini Settings > System-wide Settings > [QuickQuery] Section in the System Manager Help or user's guide.

Users will be most concerned with the "Using Queries" section, the "User Reference" section, and the "Glossary of Terms" section.

Developers will want to read these sections to understand the user experience, and then move on to the "Developer's Guide" section and the "Developer Reference" section.

Using Queries

Open a Base Query View

To open and then view a Base Query View, follow these steps:

1. From the main window of Microsoft Dynamics SL, click **Quick Query** in the navigation pane.

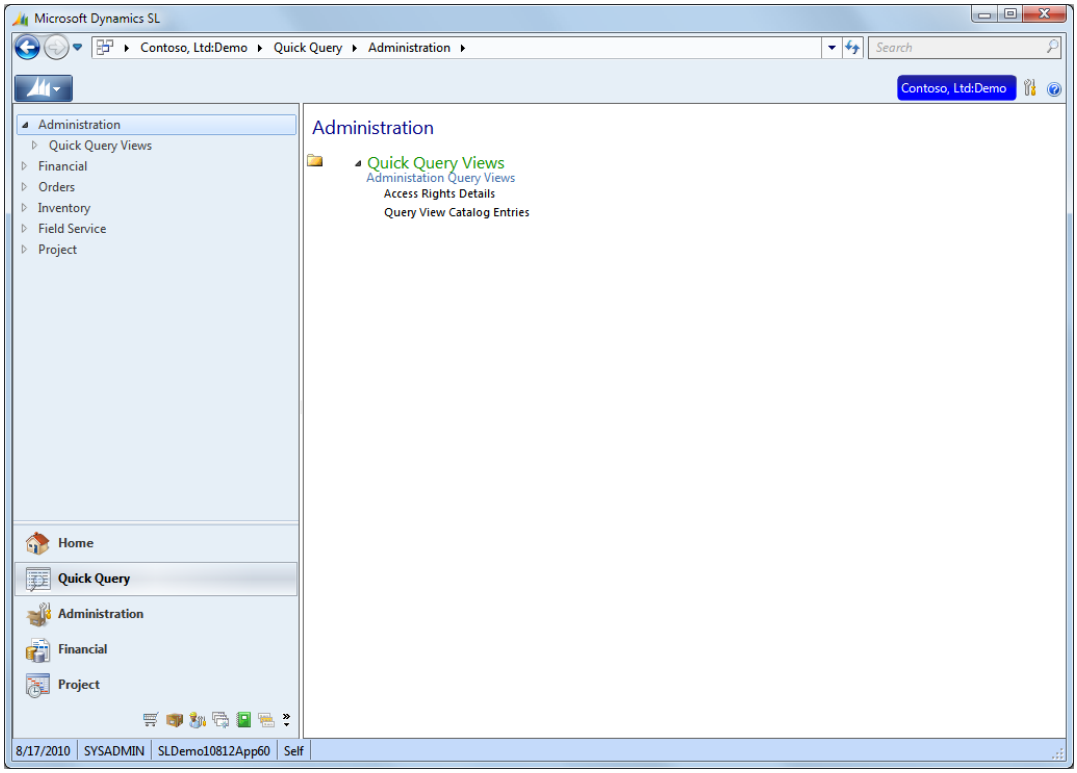


Figure 1: Quick Query module group

2. In the upper navigation pane, click one of the functional groups. The list of queries appears.

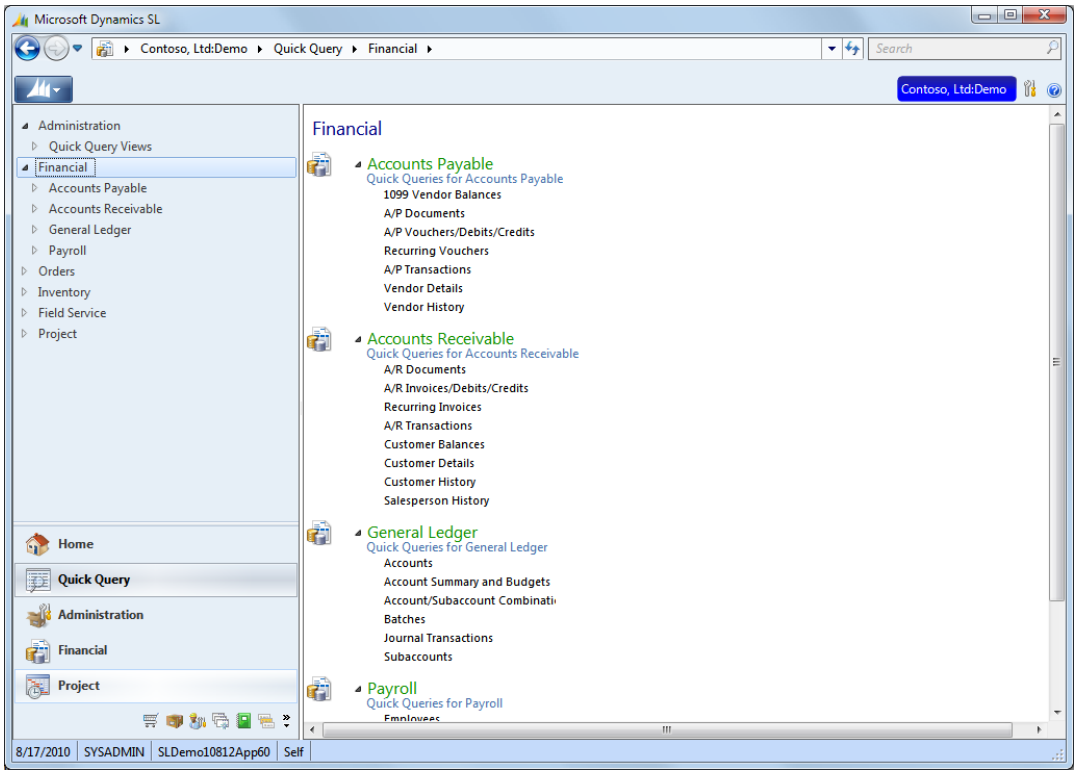
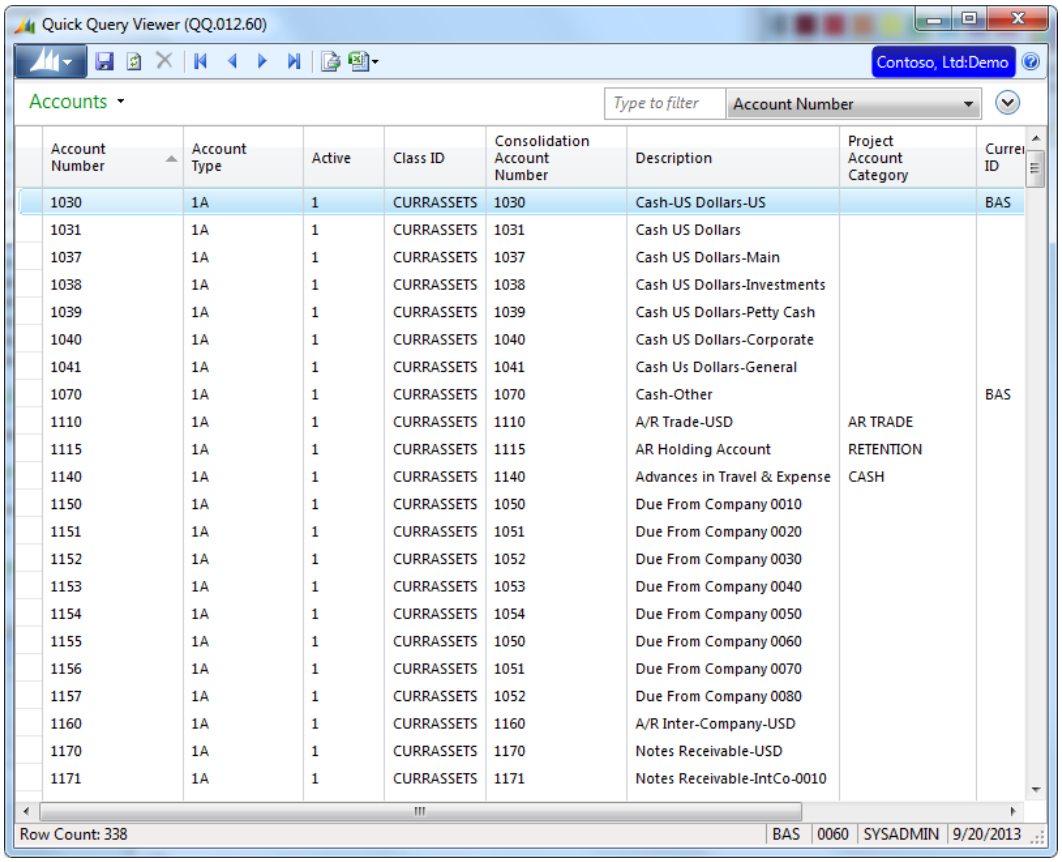


Figure 2: Financial functional group

3. Click one of the quick queries. *Quick Query Viewer* (QQ.VIE.00) appears, displaying the quick query that you selected.



Account Number	Account Type	Active	Class ID	Consolidation Account Number	Description	Project Account Category	Curre ID
1030	1A	1	CURRASSETS	1030	Cash-US Dollars-US		BAS
1031	1A	1	CURRASSETS	1031	Cash US Dollars		
1037	1A	1	CURRASSETS	1037	Cash US Dollars-Main		
1038	1A	1	CURRASSETS	1038	Cash US Dollars-Investments		
1039	1A	1	CURRASSETS	1039	Cash US Dollars-Petty Cash		
1040	1A	1	CURRASSETS	1040	Cash US Dollars-Corporate		
1041	1A	1	CURRASSETS	1041	Cash Us Dollars-General		
1070	1A	1	CURRASSETS	1070	Cash-Other		BAS
1110	1A	1	CURRASSETS	1110	A/R Trade-USD	AR TRADE	
1115	1A	1	CURRASSETS	1115	AR Holding Account	RETENTION	
1140	1A	1	CURRASSETS	1140	Advances in Travel & Expense	CASH	
1150	1A	1	CURRASSETS	1050	Due From Company 0010		
1151	1A	1	CURRASSETS	1051	Due From Company 0020		
1152	1A	1	CURRASSETS	1052	Due From Company 0030		
1153	1A	1	CURRASSETS	1053	Due From Company 0040		
1154	1A	1	CURRASSETS	1054	Due From Company 0050		
1155	1A	1	CURRASSETS	1050	Due From Company 0060		
1156	1A	1	CURRASSETS	1051	Due From Company 0070		
1157	1A	1	CURRASSETS	1052	Due From Company 0080		
1160	1A	1	CURRASSETS	1160	A/R Inter-Company-USD		
1170	1A	1	CURRASSETS	1170	Notes Receivable-USD		
1171	1A	1	CURRASSETS	1171	Notes Receivable-IntCo-0010		

Figure 3: Accounts base query view (QQ.012.60)

How to Customize Columns

You can reorder columns, rename and remove columns for a query.

Reorder Columns

To move one column at a time, follow these steps:

1. Open a Base Query View.
2. Left-click and hold the column header, drag the column to the new location, and then drop the column.

To move multiple columns at one time, follow these steps:

1. Open a Base Query View.
2. Right-click the column header, and then click **Choose Columns**. The *Choose Columns* dialog box appears.

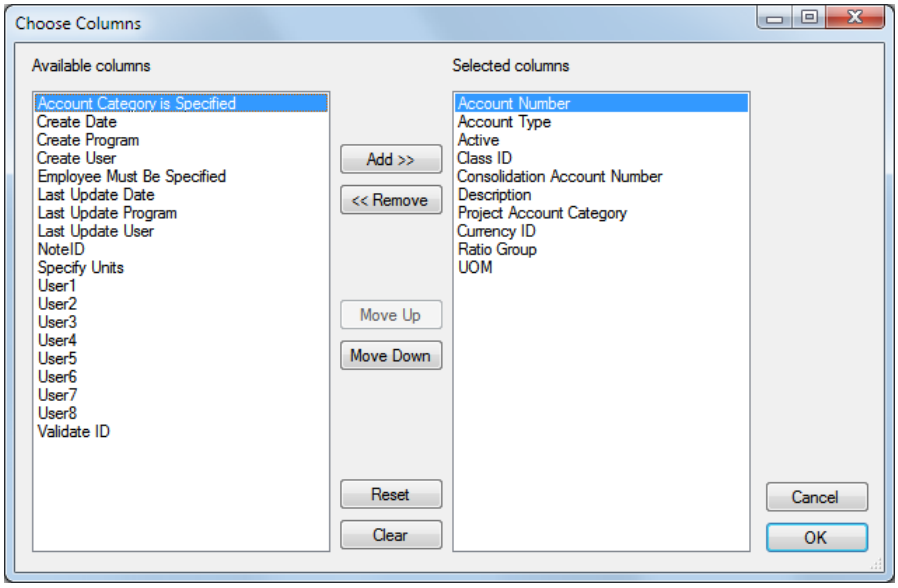


Figure 4: Choose Columns dialog box

3. In the Selected Columns list, use the pointer to put the focus on the column that you want to move, and then click **Move Up** or click **Move Down**.
4. Repeat for each column that you want to move.
5. When you are finished moving columns, click **OK** to close the *Choose Columns* screen.

Rename Column

To rename one column at a time, follow these steps:

1. Open a Base Query View.
2. Right-click the column header and then click **Rename Column**. The **Rename Column: <*Column Name*>** dialog box appears.

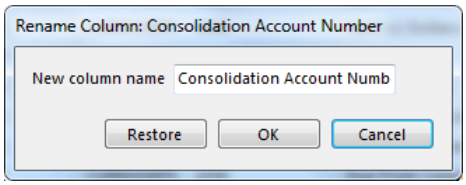


Figure 5: Rename Columns dialog box

3. Type the new name that you want to appear as the column header.

Remove Columns

To remove one column at a time, follow these steps:

4. Open a Base Query View.
5. Right-click the column header, and then click **Remove Column**.

To remove multiple columns at one time, follow these steps:

1. Open a Base Query View.
2. Right-click the column header, and then click **Choose Columns**. The *Choose Columns* screen appears.
3. In the Selected Columns list, use the pointer to put the focus on the column that you want to remove, and then click **Remove**.
4. Repeat for each column that you want to remove.
5. When you are finished removing columns, click **OK** to close the *Choose Columns* screen.

Restore Columns

To restore a column or columns, follow these steps:

1. Open a Base Query View.
2. Right-click any column header, and then click **Choose Columns**. The *Choose Columns* screen appears.
3. In the Available Columns list, use the pointer to put the focus on the column that you want to restore, and then click **Add**.
4. Repeat for each column that you want to restore.
5. When you are finished restoring columns, click **OK** to close the *Choose Columns* screen.

Change the Sort Order

- To sort ascending, left-click a column header one time. An upward pointing triangle appears in the column header.

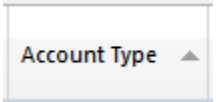


Figure 6: Sort ascending

- To sort descending, left-click a column header two times. A downwards pointing triangle appears in the column header.

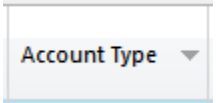


Figure 7: Sort descending

Perform a filtered search

To perform a filtered search, follow these steps:

1. Open a Base Query View.
2. Click to drop-down the list of filtered search columns, and then click to select the column that you want to use for the filtered search.

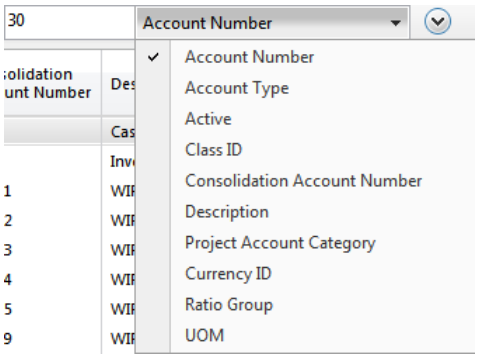


Figure 8: Search Filter column list

3. In the **Search Filter** box, overtype *Type to filter* the value that you want to use for filtering. The filter is automatically applied to the result set.

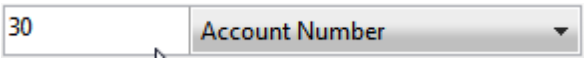


Figure 9: Search Filter box

Note: Clear the value that you typed to clear the search filter.

Open a drill down program

To open a drill down program, follow these steps:

1. Open a Base Query View.
2. Right-click a row in the result set, and then click the name of the drill down program (screen) that you want to open.

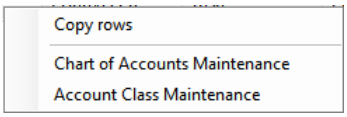


Figure 10: Drill Down program menu

Review a Note or Attachment

When a Quick query includes a note or attachment the text is not all viewable in the grid. Note text is truncated when viewing in the grid. You can hover over the text and get more information or you can open a window to get the complete text if it is a very long note. Attachments are also able to be viewed from a window.

To review the complete text of a note, follow these steps:

1. Open a Base Query View that contains the note column.
2. Right-click a row in the result set that has a note attached, and then click **Note/Attachments**.

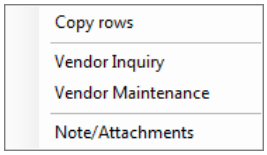


Figure 11: Drill Down program menu

3. A window will appear with the complete text of the note.

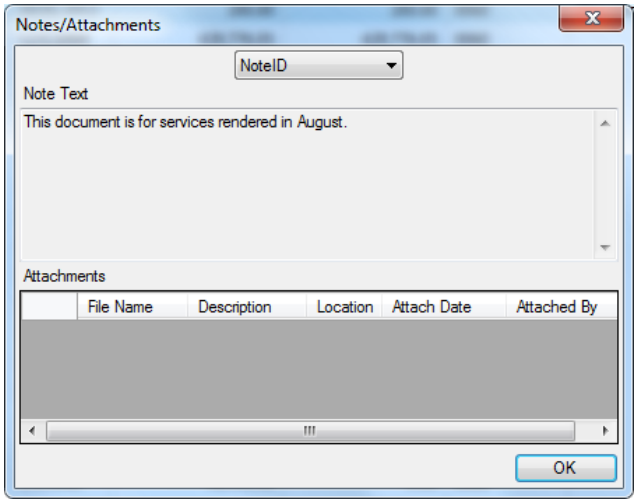


Figure 12: Notes/Attachments

To review the attachment, follow these steps:

1. Open a Base Query View that contains the note column.
2. Right-click a row in the result set that has an attachment, and then click **Note/Attachments**.

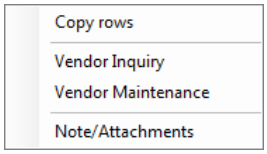


Figure 13: Drill Down program menu

3. A window will appear with the complete text of the attachment.

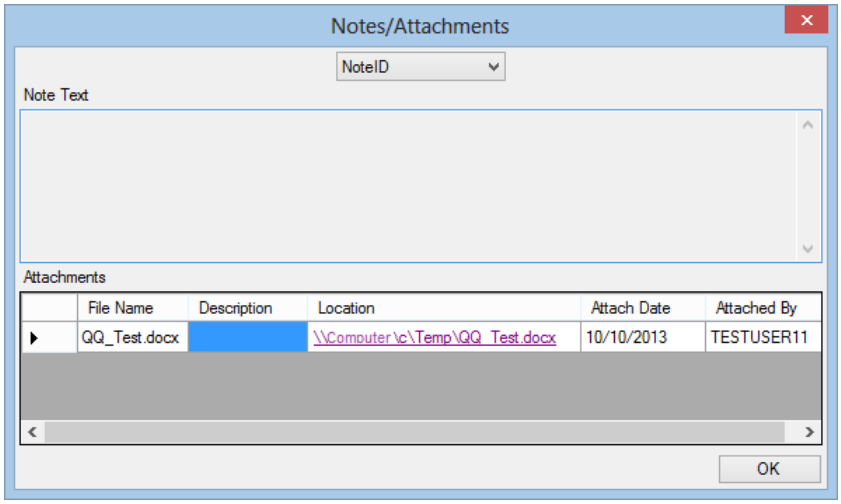


Figure 14: Notes/Attachments

4. Click the link in the location column to open the file.

Export to Microsoft Excel

There are several options when you export to Excel. **Copy To Table** gives you the results of your selection.

The **Connection**, **Query Table** and **Pivot Table** options give you a worksheet that can be refreshed without having to be signed into Microsoft Dynamics SL and it will update the workbook with the most current data.

To refresh the data without entering your credentials, you will need to have Initialization Mode rights assigned for the query in *Access Rights Maintenance* (95.270.00) that created the Excel File. If you do not have Initialization Mode rights within Microsoft Dynamics SL, or if you are using a SQL authenticated database you will be prompted for your SQL server credentials.

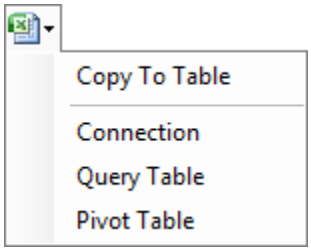


Figure 15: Export to Microsoft Excel menu

Copy To Table

When you select **Copy to Table** from the Export to Microsoft Excel menu, you will get the results of the selection that you made. This is data as of the point in time you created the worksheet.

To export a result set to Microsoft Excel, follow these steps:

1. Open a Base Query View.
2. Click **Grid to Excel** in the toolbar and choose the **Copy To Table option**. Microsoft Excel will open with the result set displayed. It copies the contents of the grid to a new worksheet.

Connection

When you select **Connection** from the **Export to Microsoft** Excel menu, a worksheet connected to the query will be created. This lets anyone who has access to this Excel file to open the file and refresh the data without having to sign into Microsoft Dynamics SL.

To add connection to a selected workbook, follow these steps:

1. Open a Base Query View.
2. Click **Grid to Excel** in the toolbar and choose the **Connection**.
3. *Create Excel Connection* will appear.

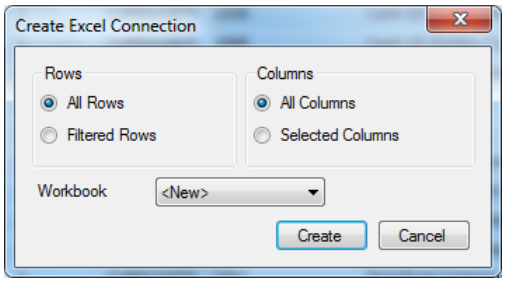


Figure 16: Create Excel Connection screen

4. Choose from the Connection Settings available.
   - **All Rows** options will ignore the Expression Builder and Quick Filter. **Filtered Rows** will export only those rows included in the displayed grid.
   - **All Columns** option will include all columns from the source SQL in the order they are defined in the view. **Selected Columns** will export only those columns displayed in the grid.
5. Select the Workbook into which you want to put this data. <New> will appear with any other Workbook that is currently open.
6. Select **Create**. Excel opens a blank spreadsheet.
7. Save the Workbook.
8. In this Excel workbook, select **Data>Existing Connections>Connections in this Workbook**, then select **Open.**
9. When the *Import Data* screen appears. Select how you want to view the data in your workbook.
10. Select the location you want the data, and then select **OK**.
11. Save the workbook.

Query Table

When you select **Query Table** from the **Export to Microsoft Excel** menu, a worksheet connected and a table bound to that connection in Excel will be created. You will get the results of the selection that you made. This will allow anyone who has access to this Excel file to open the file and refresh the data without having sign into Microsoft Dynamics SL.

To add connection and a table bound to a selected workbook and worksheet, follow these steps:

1. Open a Base Query View.
2. Click **Grid to Excel** in the toolbar and choose the **Query Table**.
3. *Create Excel Query Table* will appear.

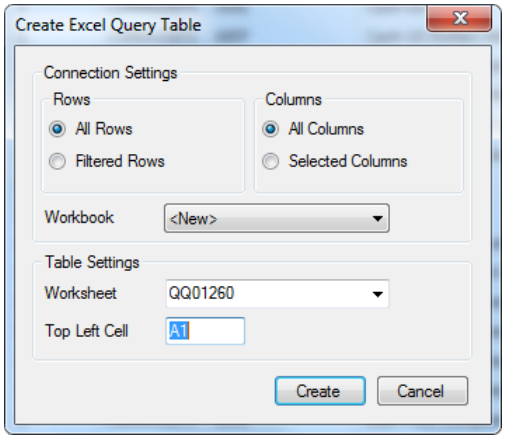


Figure 17: Create Excel Pivot Table

4. Choose from the Connection Settings available.
   - **All Rows** options will ignore the Expression Builder and Quick Filter. **Filtered Rows** will export only those rows included in the displayed grid.
   - **All Columns** option will include all columns from the source SQL in the order they are defined in the view. **Selected Columns** will export only those columns displayed in the grid.
5. Select the **Workbook** you would like to place this data. <New> will appear with any other Workbook that is currently open.
6. Select the **Worksheet** within the workbook you want the query table to appear.
7. Select the location of the **Top Left Cell** for the query table in the worksheet.
8. Select **Create**. A query table will appear with the values that were included in the grid at the time you created the query table.
9. Save the workbook.

Pivot Table

When you select **Pivot Table** from the **Export to Microsoft Excel** menu, a worksheet connected to the query will be created that has a pivot table. This will allow anyone who has access to this Excel file to open the file and refresh the pivot table without having to sign into Microsoft Dynamics SL.

To add connection to a selected workbook, follow these steps:

1. Open a Base Query View.
2. Click **Grid to Excel** in the toolbar and choose the **Pivot Table**.

Create Excel Pivot Table will appear.

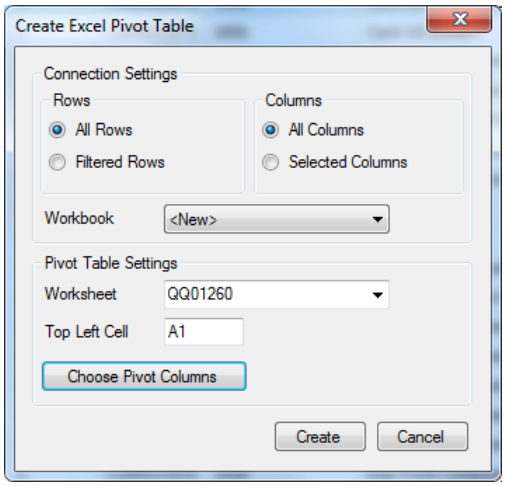


Figure 18: Create Excel Pivot Table

3. Choose from the Connection Settings available.
   - **All Rows** options will ignore the Expression Builder and Quick Filter. **Filtered Rows** will export only those rows included in the displayed grid.
   - **All Columns** option will include all columns from the source SQL in the order they are defined in the view. **Selected Columns** will export only those columns displayed in the grid.
4. Select the **Workbook** you would like to place this data. <New> will appear with any other Workbook that is currently open.
5. Select the **Worksheet** within the workbook you want the pivot table to appear.
6. Select the location of the **Top Left Cell** for the pivot table in the worksheet.
7. Click **Choose Pivot Columns**, *Choose Columns* appears.

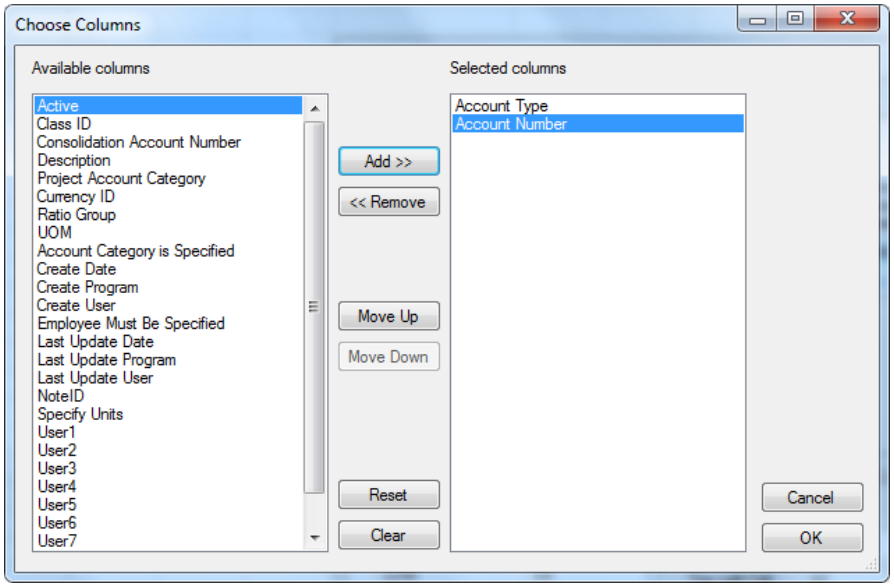


Figure 19: Create Excel Pivot Table

8. Select the columns you want included in the pivot table. Make the selection and order them in the manner you want them to appear.
9. Select **Create**. A blank pivot table will appear with all the available fields to select from appearing at the right of the worksheet.

10. Select the fields you want included in the file, make the selection and order them in the manner you want them to appear.
11. Save the workbook.

Use the Copy Rows functionality

To use the copy rows functionality, follow these steps:

1. Open a Base Query View.
2. Right-click one or more rows in the result set, and then click **Copy Rows**. This copies the content of the rows into the clipboard.

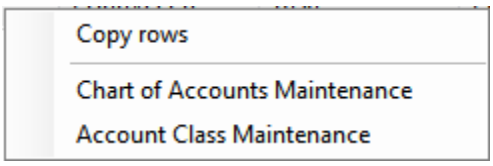


Figure 20: Copy Rows program menu

3. Switch to the program where you want to paste the results, and then click `CTRL+V` to paste.

Creating and Working with Filtered Query Views

A Filtered Query View is a Base Query View where the user has added one or more filters, changed the sort order, changed the column order, or added/removed columns, and so on The examples that follow show adding a filter but any of the previous changes can be made and saved as a Filtered Query View. The following steps relate to the following figure.

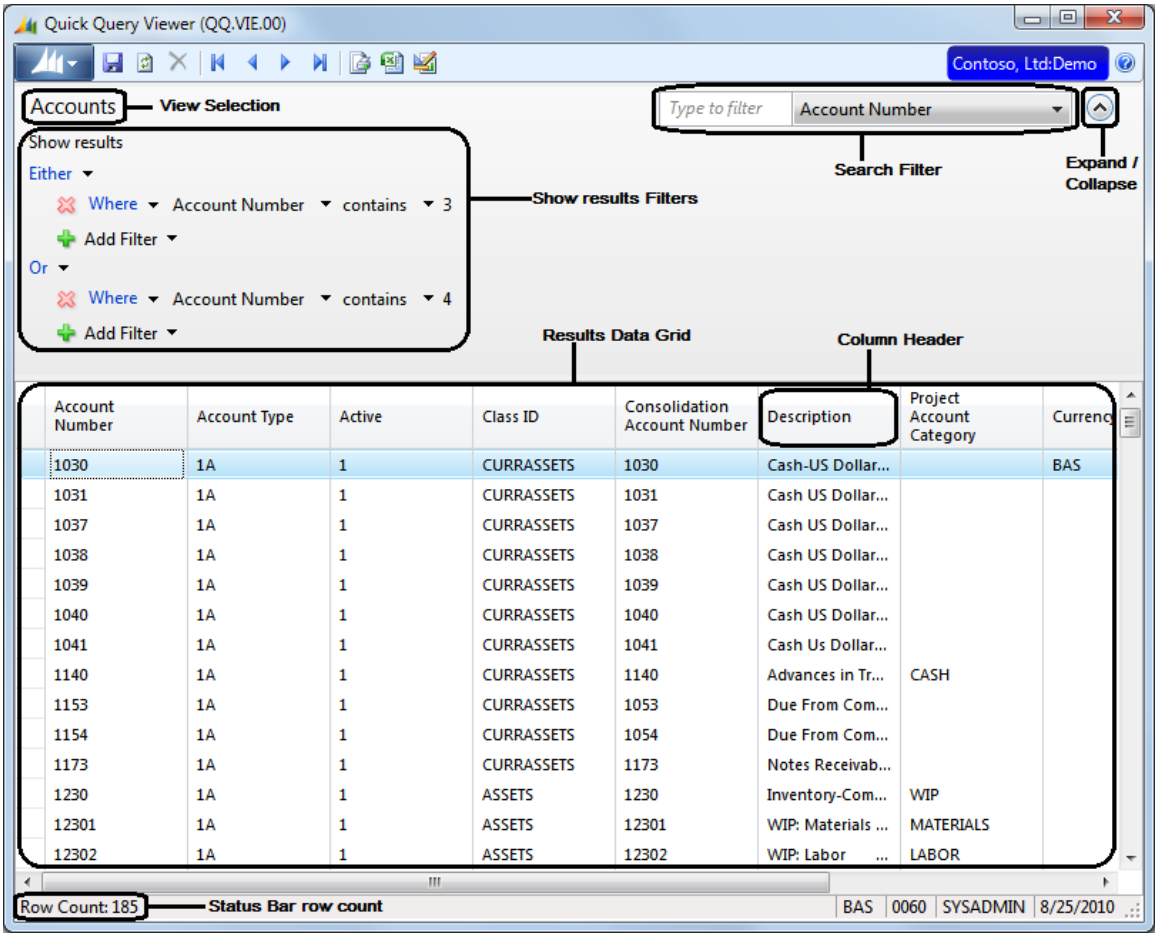


Figure 21: Quick Query Viewer (QQ.VIE.00), descriptions

To create and save a filtered query view, follow these steps:

1. Open a Base Query View or an existing Filtered Query View from the Quick Query module group.
2. Click **Expand** . The **Show results filter** area appears.

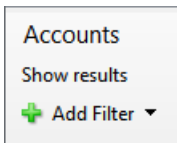


Figure 22: Show results filter

3. Click **Add Filter** Add Filter .

4. Select the column by which you want to filter.

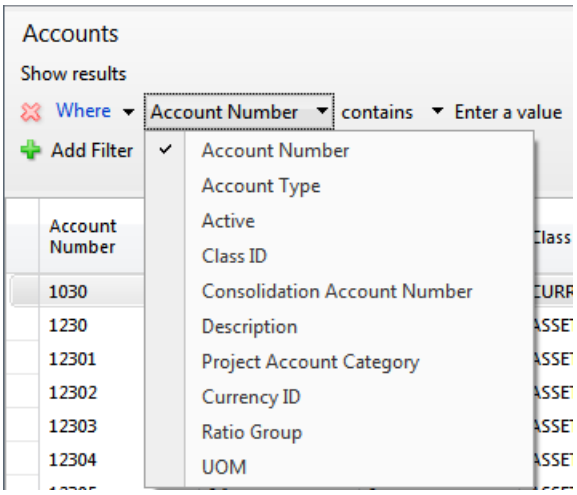


Figure 23: Show results filter, column selection menu

5. Select the operator that you want to use. If you are selecting a numeric type, such as a dollar amount the operator selection menu will show as =, <>, between (inclusive), <, <=, >, >=, and is empty.

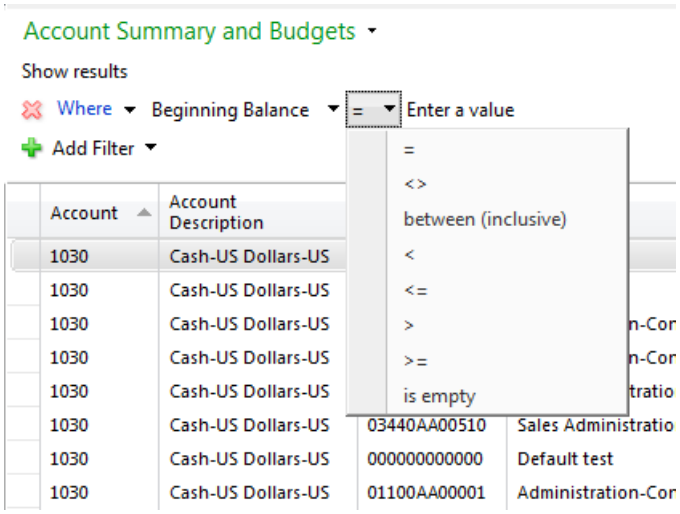


Figure 24: Show results filter, operator selection menu for a numeric field

If you are selecting an alpha or alpha numeric field the operator selection menu will show values such as contains, begins with, is, is not, does not contain, is between and includes, is greater than and includes, is less than and includes, and is empty.

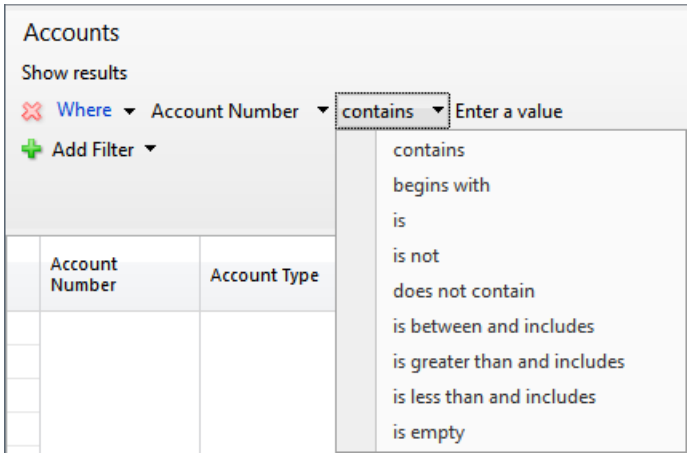


Figure 25: Show results filter, operator selection menu for an alpha numeric field

6. Click **Enter a value**, type the value by which you want to filter, and then press Tab. The result set changes.
7. To add another filter, click the down arrow on the next Add Filter  , and then select the filter operator that you want. The following is a list of filter operator choices:
   - And
   - And not
   - Or
   - Or not
   - And either
8. Click **Save**. The *Save Filtered Query View* dialog box appears.

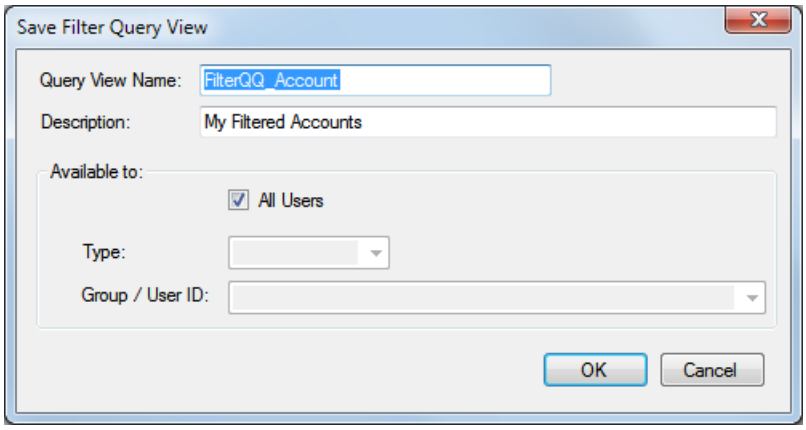


Figure 26: Save Filtered Query View dialog box

9. Specify the following settings:
   a) **Query View Name**: Type the name of the filtered query view.
   b) **Description**: Type the description that you want to appear in the menu system.

   Available to:

   – **All Users**: Click to select to make the filtered query view available to all users. If you click to clear the check box, you must specify the **Type** and the **Group / User ID**.

c) **Type**: Select Group or User

d) **Group / User ID**: Select the group or the user from the list

10. Click **OK**.

Note: The filtered query view will appear indented under the related base query view after the menu system updates the next time.

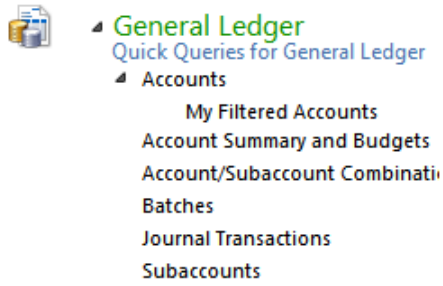
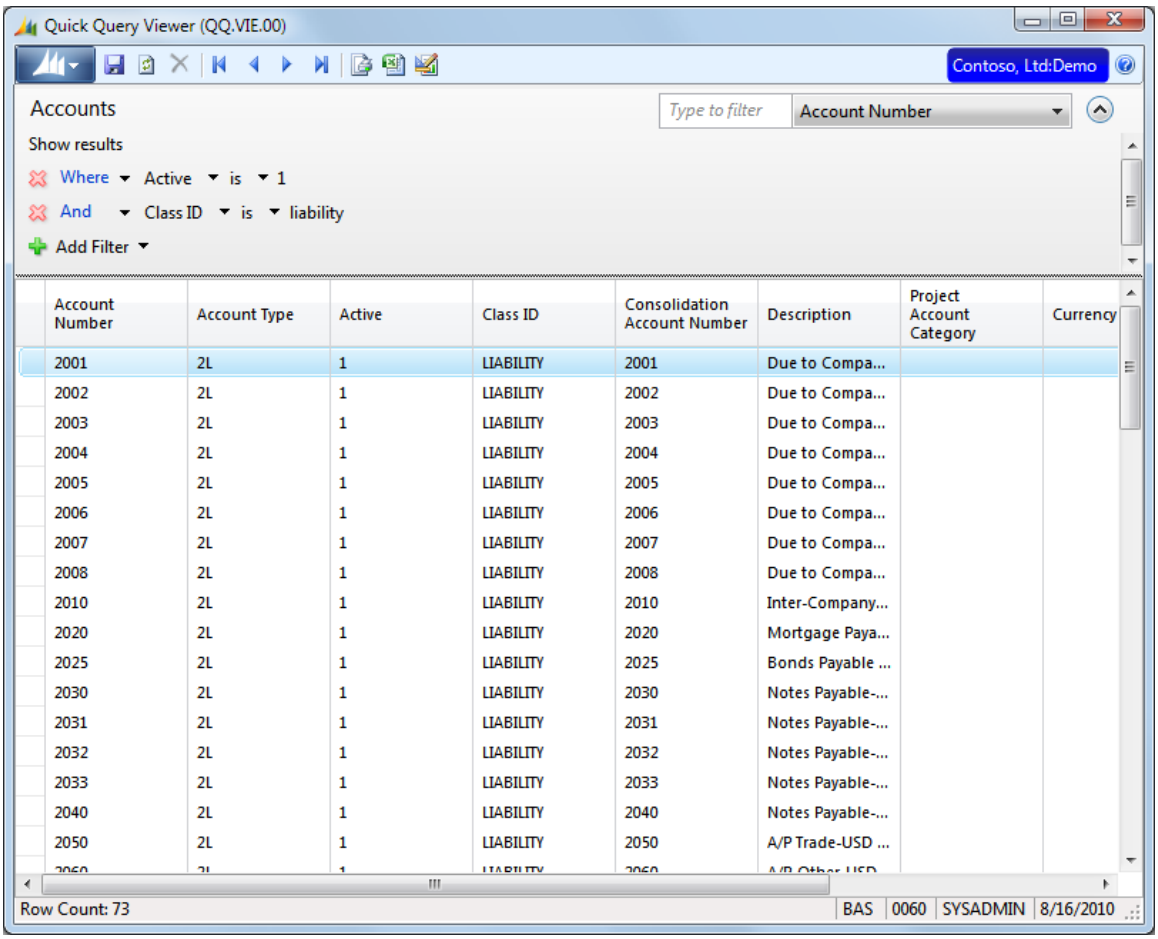


Figure 27: Filtered Query View on the menu

Example:

If you want to create a filtered query view that shows the active accounts that also belong to the Liability Class ID, the filter that you create should resemble the following:



Account Number	Account Type	Active	Class ID	Consolidation Account Number	Description	Project Account Category	Currency
2001	2L	1	LIABILITY	2001	Due to Compa...		
2002	2L	1	LIABILITY	2002	Due to Compa...		
2003	2L	1	LIABILITY	2003	Due to Compa...		
2004	2L	1	LIABILITY	2004	Due to Compa...		
2005	2L	1	LIABILITY	2005	Due to Compa...		
2006	2L	1	LIABILITY	2006	Due to Compa...		
2007	2L	1	LIABILITY	2007	Due to Compa...		
2008	2L	1	LIABILITY	2008	Due to Compa...		
2010	2L	1	LIABILITY	2010	Inter-Company...		
2020	2L	1	LIABILITY	2020	Mortgage Paya...		
2025	2L	1	LIABILITY	2025	Bonds Payable ...		
2030	2L	1	LIABILITY	2030	Notes Payable-...		
2031	2L	1	LIABILITY	2031	Notes Payable-...		
2032	2L	1	LIABILITY	2032	Notes Payable-...		
2033	2L	1	LIABILITY	2033	Notes Payable-...		
2040	2L	1	LIABILITY	2040	Notes Payable-...		
2050	2L	1	LIABILITY	2050	A/P Trade-USD ...		

Figure 28: Example of a multiline filter

To change an existing filtered query view, follow these steps:

1. Open a Filtered Query View.
2. Make any changes that you need to.
3. Click **Save**. The *Save Filtered Query View* dialog box appears.
4. Click **OK**.

To delete an existing filtered query view, follow these steps:

1. Open the Base Query View to which the Filtered Query View is related.
2. Use View Selection to select the Filtered Query View.
3. Click **Delete**.
4. Click **Yes** to confirm the deletion.

Creating an SSRS Report by using a Query

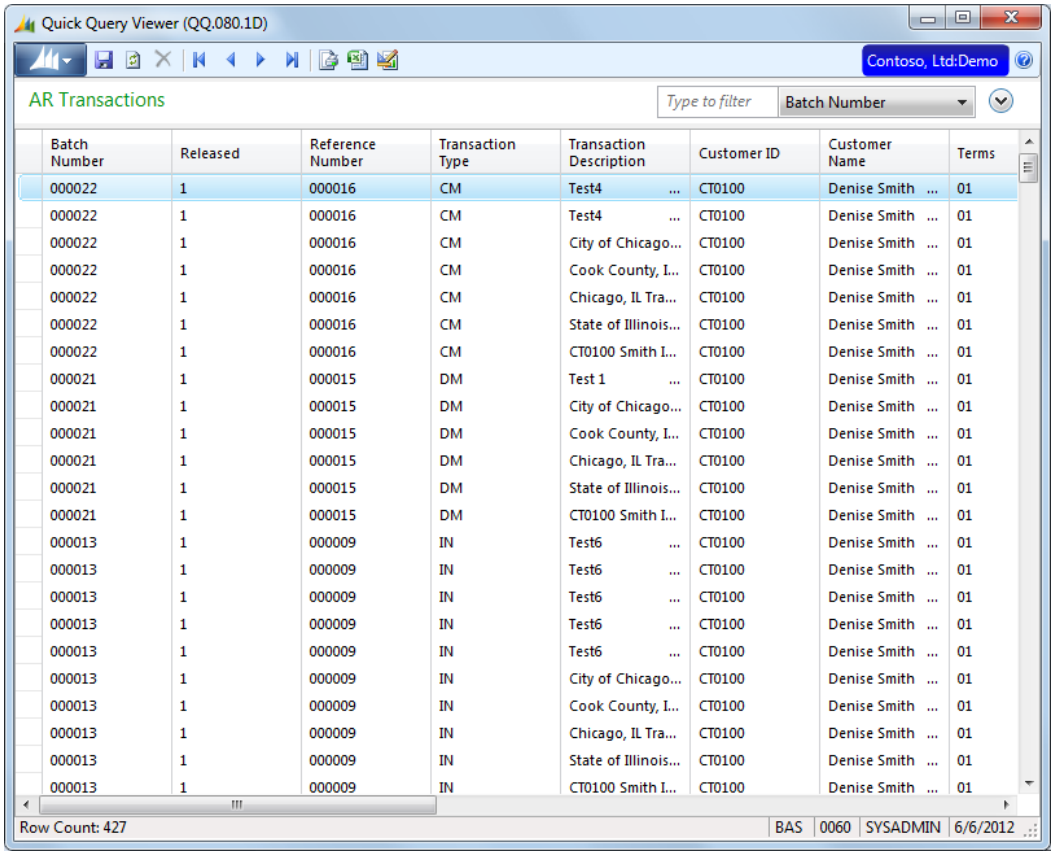
You can use any Quick Query to generate a SQL Server Report Server report. Users can then view these reports by using Business Analyzer. When you create them, the custom SSRS reports can be saved in the same location as the standard Business Analyzer Reports and use the same security.

For more information about how to use Business Analyzer, see the Business Analyzer Help or user's guide.

Note: You must have rights in SSRS to see the menu option to generate an SSRS Report. You must also have rights to the RS.DEV.00 screen in *Access Rights Maintenance* (95.270.00). For more information about how to assign rights, see "Permissions to Generate SSRS Reports from Quick Query" in the Business Analyzer user's guide.

To create an SSRS report from a Quick Query, follow these steps:

1. Create the Quick Query by using the previous procedure, then open the query from which you want to create an SSRS report.



Batch Number	Released	Reference Number	Transaction Type	Transaction Description	Customer ID	Customer Name	Terms
000022	1	000016	CM	Test4 ...	CT0100	Denise Smith ...	01
000022	1	000016	CM	Test4 ...	CT0100	Denise Smith ...	01
000022	1	000016	CM	City of Chicago...	CT0100	Denise Smith ...	01
000022	1	000016	CM	Cook County, I...	CT0100	Denise Smith ...	01
000022	1	000016	CM	Chicago, IL Tra...	CT0100	Denise Smith ...	01
000022	1	000016	CM	State of Illinois...	CT0100	Denise Smith ...	01
000022	1	000016	CM	CT0100 Smith I...	CT0100	Denise Smith ...	01
000021	1	000015	DM	Test 1 ...	CT0100	Denise Smith ...	01
000021	1	000015	DM	City of Chicago...	CT0100	Denise Smith ...	01
000021	1	000015	DM	Cook County, I...	CT0100	Denise Smith ...	01
000021	1	000015	DM	Chicago, IL Tra...	CT0100	Denise Smith ...	01
000021	1	000015	DM	State of Illinois...	CT0100	Denise Smith ...	01
000021	1	000015	DM	CT0100 Smith I...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Test6 ...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Test6 ...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Test6 ...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Test6 ...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Test6 ...	CT0100	Denise Smith ...	01
000013	1	000009	IN	City of Chicago...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Cook County, I...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Chicago, IL Tra...	CT0100	Denise Smith ...	01
000013	1	000009	IN	State of Illinois...	CT0100	Denise Smith ...	01
000013	1	000009	IN	CT0100 Smith I...	CT0100	Denise Smith ...	01

Figure 29: Quick Query Viewer

2. On the toolbar, click **Generate SSRS Report**. Or, select **Generate SSRS Report** from the **Actions** menu.

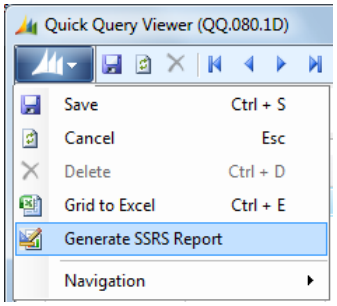


Figure 30: Quick Query Viewer menu

The *Report Generation Wizard, Create Report* screen appears.

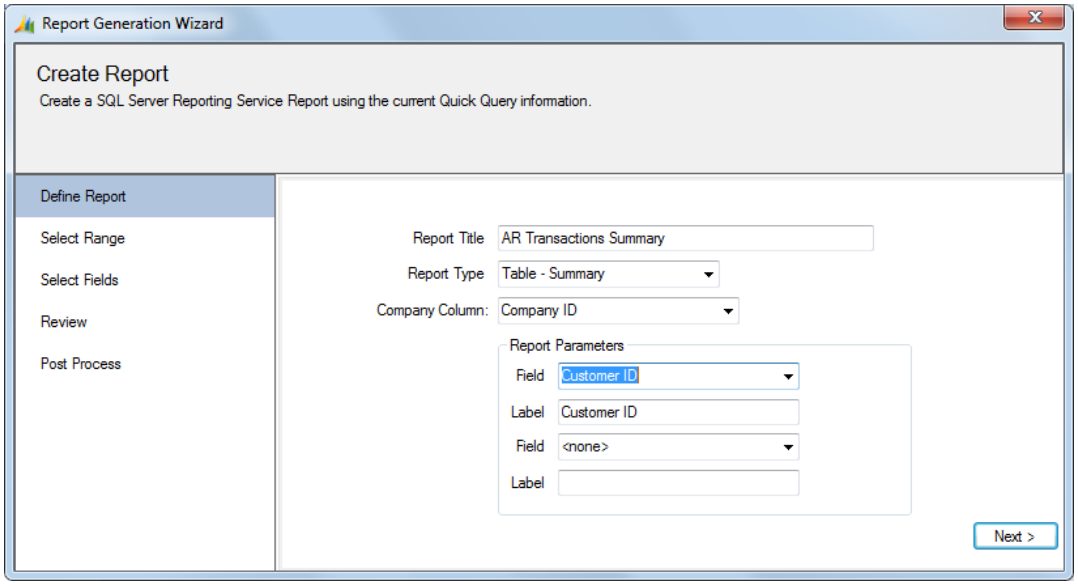


Figure 31: Report Generation Wizard – Define Report

3. **Define Report** defaults the name of the Query as the **Report Title**, change the title if you want.
4. In **Report Type**, specify the kind of report. The options include the following:
   - Table - Detail
   - Table - Summary
   - Chart – Column/Line

   Note: If the *Chart – Column/Line* type is selected, the *Select Range* page appears after you complete the *Define Report* page.

5. If company is included in the Quick Query that you are using, select the Company ID field in **Company Column**. Otherwise, select <none>. This requires you to select a company parameter when you run the report.
6. You can select two **Report Parameters**. The fields that appear are those that are set by default in the query.
7. Type a label for each parameter that you select.

   If no parameters are selected, the **Field** box contains <none> and no parameters can be set when you run the report. You should include parameters if you have a high volume of data so that you can limit the data that is sorted to produce the report.

8. Click **Next** when the *Define Report* page is finished.
9. (optional) If you selected *Chart - Column/Line* in **Report Type**, the *Select Range* page appears.

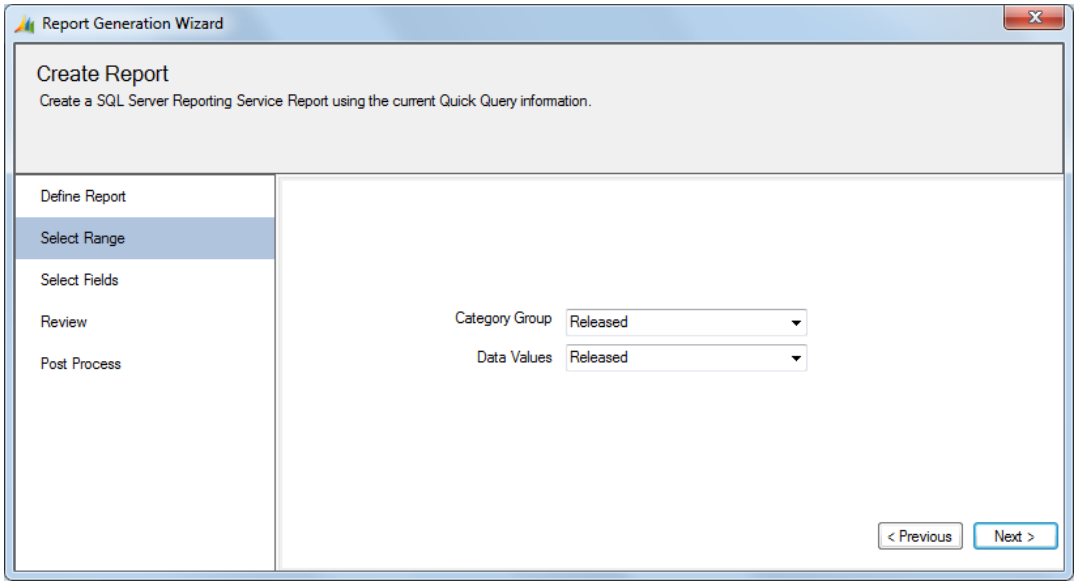


Figure 32: Report Generation Wizard – Select Range

10. Select the field that you want to use for the **Category Group**. You can select from any field in the report.
11. Select which **Data Value** is used for the category group.
12. Click **Next**. The *Select Fields* page appears.

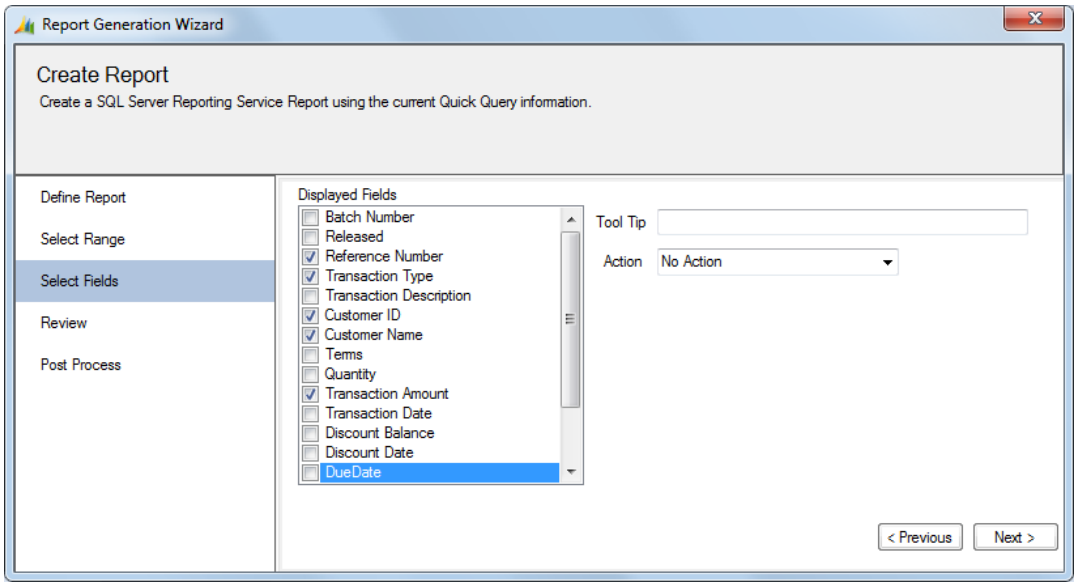


Figure 33: Report Generation Wizard – Select Fields

13. Select the fields that you want to display on the report.
14. For the each displayed field, you can enter a **Tool Tip** that is displayed when you view the report. This is especially helpful for fields that have **Actions** assigned.

15. If you want to have an action occur on a field when it is selected when you view the report, select from the **Action** list. The choices are as follows:
    - Drillthrough (Report)
    - Link (Screen)
    - Link (URL)
16. Click **Next**, the *Review* page appears.

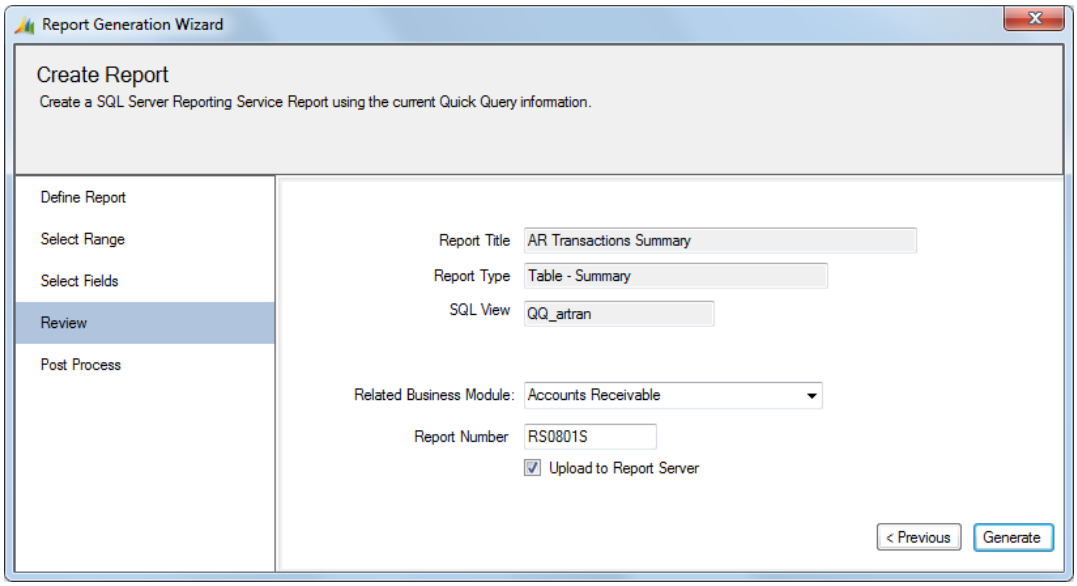


Figure 34: Report Generation Wizard – Review

17. The information that is provided on the *Define Report* page is displayed in the **Report Title** box and in the **Report Type** box. The SQL view from the Quick Query view that you selected appears in the **SQL View** box. You can change these values if you want.

    The **Related Business Module** defaults, based on the related module assigned to the Quick Query.

    A **Report Number** is generated that resembles the Quick Query number, but can be changed at this point. This is then assigned in *Access Rights Maintenance* (95.270.00) for the users who will have access to view the report.

    The **Upload to Report Server** check box automatically uploads the report to the server for you.

    Note: You must have rights to the RS.DEP.LO screen in *Access Rights Maintenance* (95.270.00), see “Permissions to Upload Reports to Report Server” in the Business Analyzer user’s guide.

18. Click **Generate**. The *Report Generation Wizard* finishes a checklist of items for to create the report, and then finishes the *Post Process*.

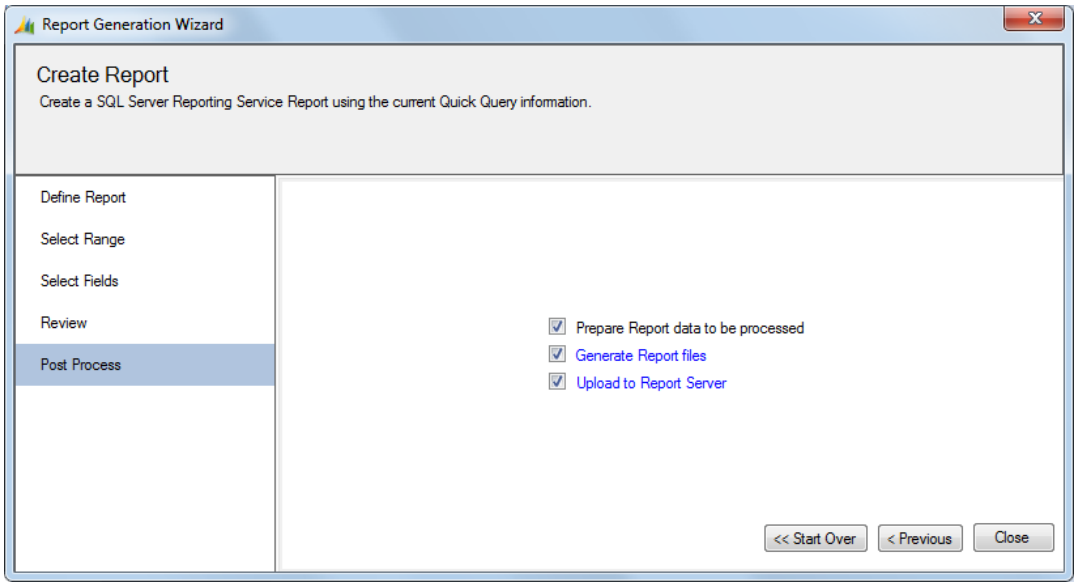


Figure 35: Report Generation Wizard – Post Process

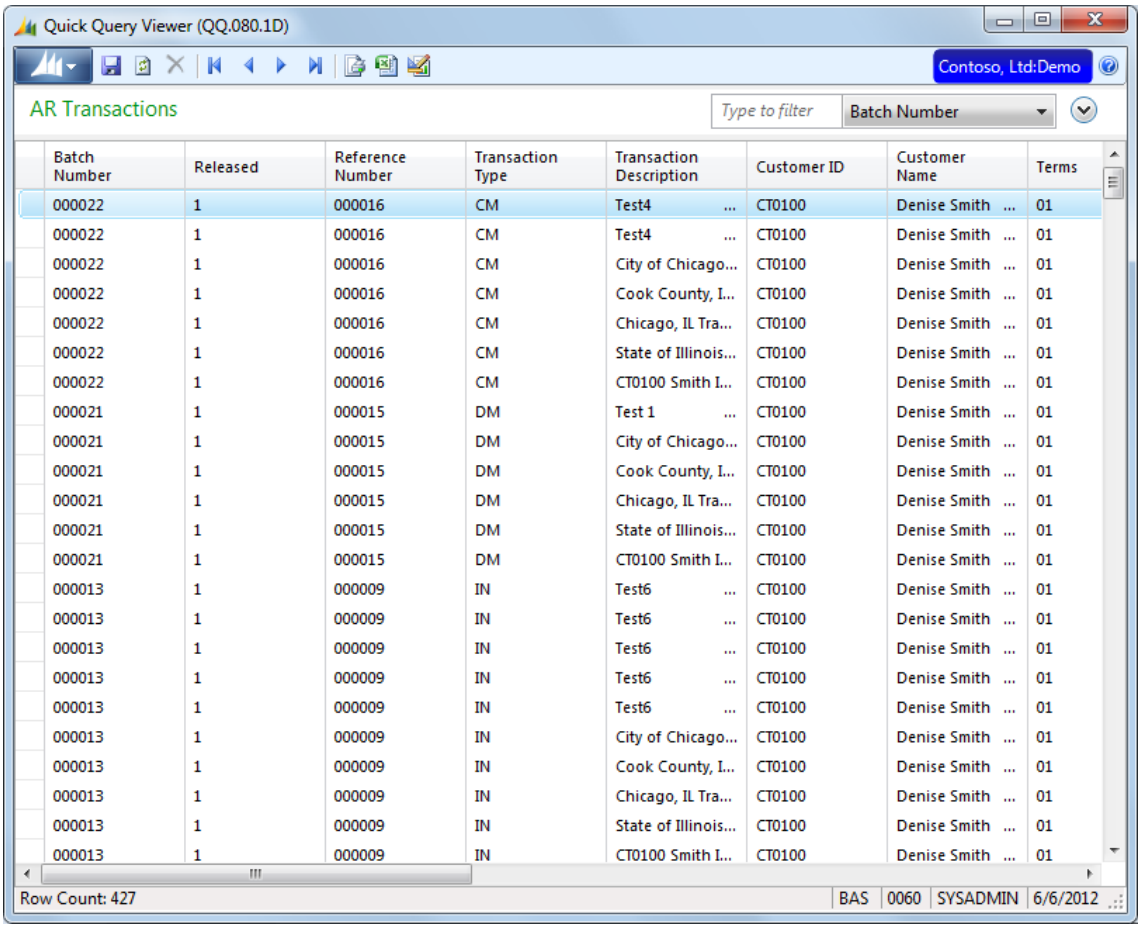
19. Close *Report Generation Wizard* by clicking **Close** or start a new report by clicking **Start Over**.

    Note: If User Account Control is enabled you may receive an error when you try to update the Report Server.

User Reference

Quick Query Viewer (QQ.VIE.00)

Use *Quick Query Viewer* (QQ.VIE.00) to display and filter queries in view mode or to create or change base query views in maintenance mode. For developer related information, see “Developer Reference” on page 47.



Batch Number	Released	Reference Number	Transaction Type	Transaction Description	Customer ID	Customer Name	Terms
000022	1	000016	CM	Test4 ...	CT0100	Denise Smith ...	01
000022	1	000016	CM	Test4 ...	CT0100	Denise Smith ...	01
000022	1	000016	CM	City of Chicago...	CT0100	Denise Smith ...	01
000022	1	000016	CM	Cook County, I...	CT0100	Denise Smith ...	01
000022	1	000016	CM	Chicago, IL Tra...	CT0100	Denise Smith ...	01
000022	1	000016	CM	State of Illinois...	CT0100	Denise Smith ...	01
000022	1	000016	CM	CT0100 Smith I...	CT0100	Denise Smith ...	01
000021	1	000015	DM	Test 1 ...	CT0100	Denise Smith ...	01
000021	1	000015	DM	City of Chicago...	CT0100	Denise Smith ...	01
000021	1	000015	DM	Cook County, I...	CT0100	Denise Smith ...	01
000021	1	000015	DM	Chicago, IL Tra...	CT0100	Denise Smith ...	01
000021	1	000015	DM	State of Illinois...	CT0100	Denise Smith ...	01
000021	1	000015	DM	CT0100 Smith I...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Test6 ...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Test6 ...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Test6 ...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Test6 ...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Test6 ...	CT0100	Denise Smith ...	01
000013	1	000009	IN	City of Chicago...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Cook County, I...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Chicago, IL Tra...	CT0100	Denise Smith ...	01
000013	1	000009	IN	State of Illinois...	CT0100	Denise Smith ...	01
000013	1	000009	IN	CT0100 Smith I...	CT0100	Denise Smith ...	01

Figure 36: Quick Query Viewer (QQ.VIE.00)

The following figure shows the areas of the *Quick Query Viewer* (QQ.VIE.00) screen that are unique to the Quick Query module.

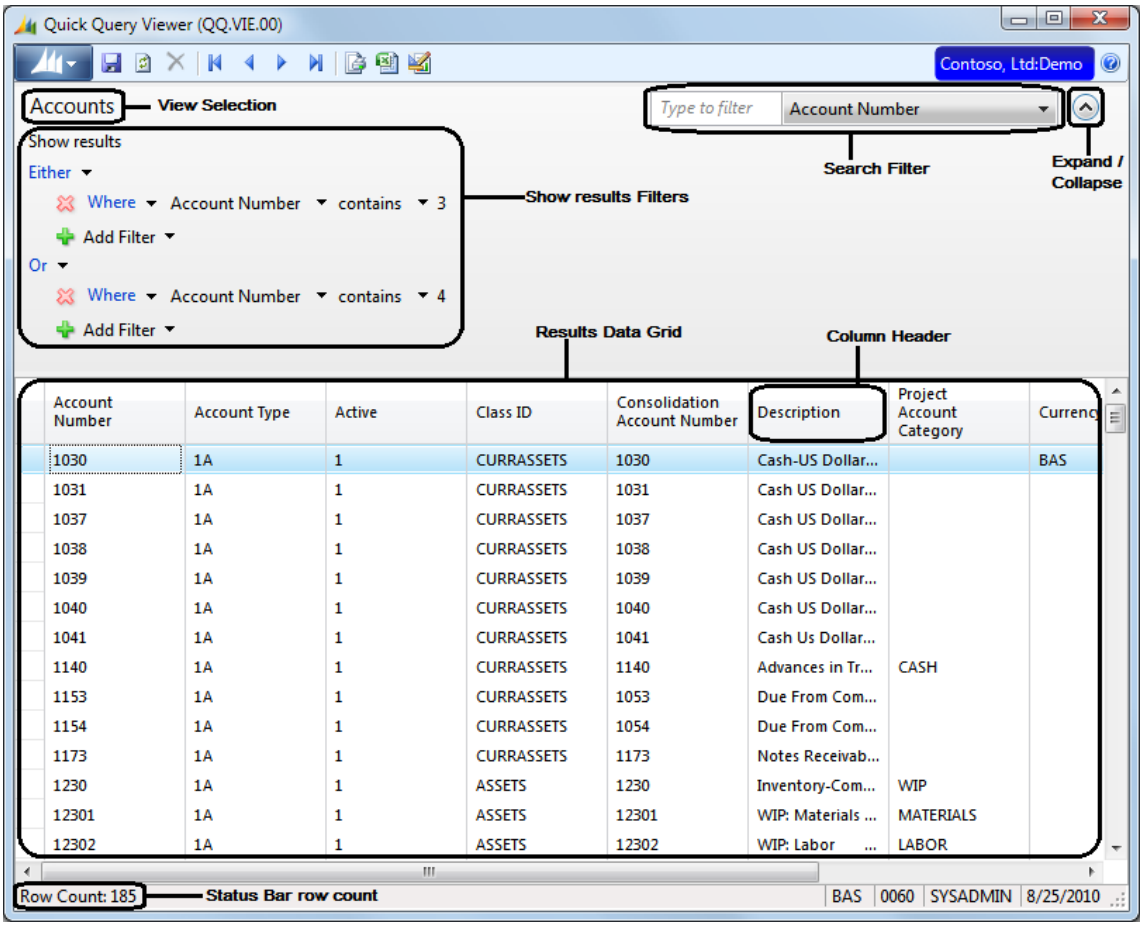


Figure 37: Quick Query Viewer (QQ.VIE.00), descriptions

The following are the area descriptions for *Quick Query Viewer* (QQ.VIE.00).

View selection

View Selection displays the name of the current Base Query View or Filtered Query View. Click **View selection** to select a related Filtered Query View. When in maintenance mode, you can select another Base Query View.

Note: To open *Quick Query Viewer* (QQ.VIE.00) in maintenance mode, you must have Update level permissions to the screen and also open the screen from the Administration module group. To confirm that *Quick Query Viewer* (QQ.VIE.00) is in maintenance mode, look for the **New** icon.

Show results Filters

Use **Show results Filters** to specify multiple filter criteria that you want to apply to the results. You can use this interactively, or you can save it as part of a Filtered Query View. When in maintenance mode, you can save this as part of a Base Query View.

Search Filter

Use **Search Filter** to perform a quick search for whether a particular column contains a value.

Expand / Collapse

Expand / Collapse lets you expand the area that displays the **Show results Filters** or collapse the area to hide the **Show results Filters**.

Column Header

Column Header contains a descriptive name for the column. You can drag-and-drop the column by grabbing the **Column Header**. You can sort the column's contents ascending or descending by clicking the **Column Header**.

Results Data Grid

Results Data Grid contains the data results. Use the up/down and right/left scrollbars to view all the data.

Status Bar row count

Status Bar row count provides a count of the rows in the Results Data Grid. The **Status Bar row count** updates after you perform a Search Filter or use the Show results Filters.

Choose Columns

Use *Choose Columns* to specify the columns that will be shown and the order of the columns. Do this when you view a Base Query View, view a Filtered Query View, when you create a new Base Query View, or when you change a custom Base Query View. For more information about *Choose Columns*, see "How to Customize Columns" on page10.

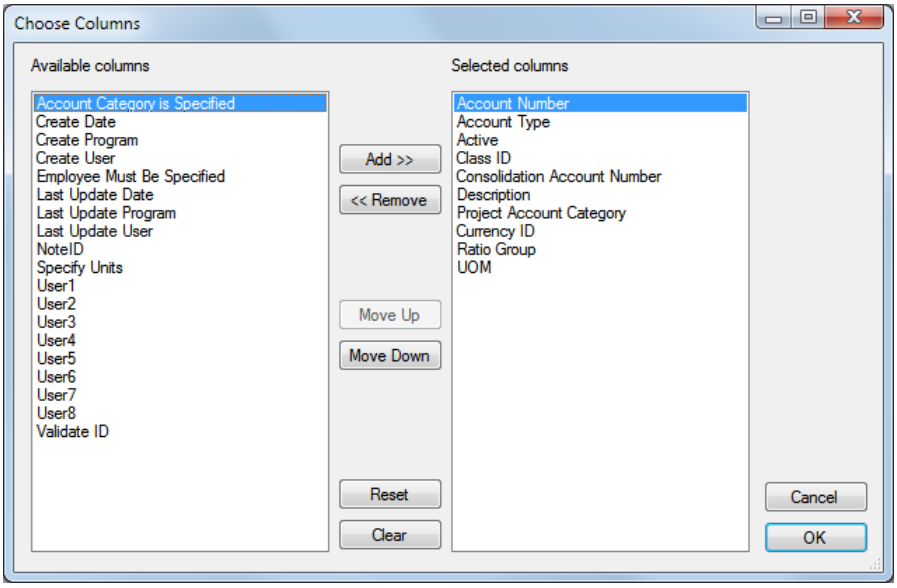


Figure 38: Quick Query Viewer (QQ.VIE.00), Choose Columns

Available columns

Available columns lists all the columns available in the SQL Query View, minus the columns that appear in **Selected columns**.

Selected columns

Selected columns contains the columns that are displayed when you view the Base Query View or Filtered Query View in *Quick Query Viewer* (QQ.VIE.00).

Add >>

Click **Add >>** to move the highlighted column from **Available columns** to **Selected columns**.

<< Remove

Click **<< Remove** to move the highlighted column from **Selected columns** to **Available columns**.

Move Up

Click **Move Up** to move the highlighted column upward in the list.

Move Down

Click **Move Down** to move the highlighted column downwards in the list.

Reset

Click **Reset** to reset the **Available columns** list and the **Selected columns** list to the default.

Clear

Click **Clear** to move all columns from **Available columns** to **Selected columns**.

OK

Click **OK** to accept the choice that you made.

Cancel

Click **Cancel** to close *Choose Columns* without saving changes.

Rename Column

Use *Rename Column* to change the name on a column in a quick query. Do this when you view a Base Query View, view a Filtered Query View, when you create a new Base Query View, or when you change a custom Base Query View. For more information about *Rename Column*, see “Rename Column” on page 11.

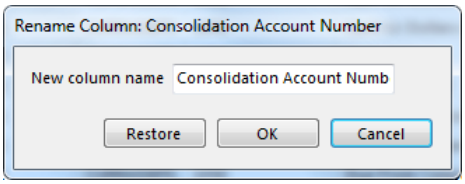


Figure 39: Quick Query Viewer (QQ.VIE.00), Save Filtered Query View

New column name

Type the name you would like to display as the column heading.

Save Filtered Query View

Use *Save Filtered Query View* to specify the name, description, and other information when you create a Filtered Query View. For more information about *Save Filtered Query View*, see “Creating and Working with Filtered Query Views” on page 19.

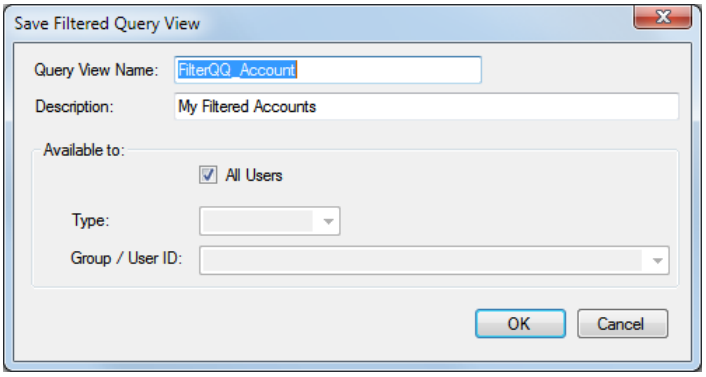


Figure 40: Quick Query Viewer (QQ.VIE.00), Save Filtered Query View

Query View Name

Use **Query View Name** to specify a unique name for the query.

Description

Description contains a longer description of the Filtered Query View.

Available to area

All Users

Select **All Users** to make the Filtered Query View available to all users who have permissions to the related Base Query View.

Type

Use **Type** to specify whether the Filtered Query View is available to a User or a Group if you cleared **All Users**.

Group / User ID

Use **Group / User ID** to specify the group ID or the user ID that has permissions to view this Filtered Query View if you cleared **All Users**.

OK

Click **OK** to accept the choice that you made.

Cancel

Click **Cancel** to close *Save Filtered Query View* without saving changes.

Create Excel Connection

When you select **Connection** from the **Export to Microsoft Excel** menu, a worksheet connected to the query will be created. This will allow anyone who has access to this Excel file to open the file and refresh the data without having to sign into Microsoft Dynamics SL. For more information see "Export to Microsoft Excel" on page 14.

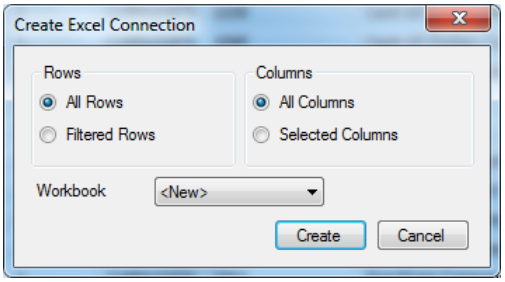


Figure 41: Create Excel Connection

All Rows

Runs the query without any restrictions on the rows, when the workbook is created and refreshed.

Filtered Rows

Runs the query with the same restrictions on the rows as in the query, when the workbook is created and refreshed.

All Columns

Includes all columns from the source SQL view, in the order they are defined in the view. Uses this for the creation and the refreshing of the data.

Selected Columns

Runs the query with the same restrictions on the columns as in the query, when the workbook is created and refreshed.

Workbook

Select from <New> or a workbook that you currently have open.

Create Excel Query Table

When you select **Query Table** from the **Export to Microsoft Excel** menu, a worksheet connected and a table bound to that connection in Excel will be created. You will get the results of the selection that you made. This will allow anyone who has access to this Excel file to open the file and refresh the data without having sign into Microsoft Dynamics SL. For more information see "Export to Microsoft Excel" on page 14.

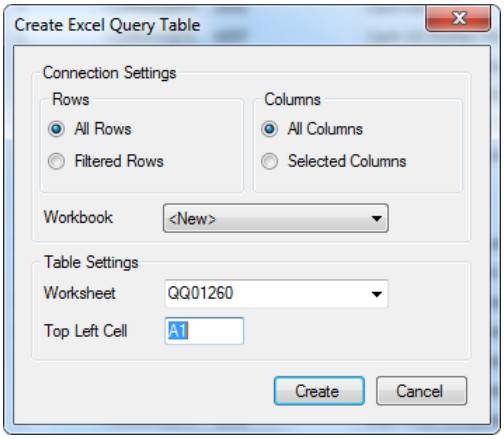


Figure 42: Create Excel Connection

All Rows

Runs the query without any restrictions on the rows, when the workbook is created and refreshed.

Filtered Rows

Runs the query with the same restrictions on the rows as in the query, when the workbook is created and refreshed.

All Columns

Includes all columns from the source SQL view, in the order they are defined in the view. Uses this for the creation and the refreshing of the data.

Selected Columns

Runs the query with the same restrictions on the columns as in the query, when the workbook is created and refreshed.

Workbook

Select from <New> or a workbook that you currently have open.

Worksheet

A name will default in **Worksheet** if you have selected <New> in **Workbook**. If you entered an existing Workbook, you will have the option to select any of the worksheets in workbook by clicking on the down arrow and selecting the worksheet.

Top Left Cell

Choose the cell location you would like the data to start populating.

Create Excel Pivot Table

When you select **Pivot Table** from the Export to Microsoft Excel menu, a worksheet connected to the query will be created that has a pivot table. This will allow anyone who has access to this Excel file to open the file and refresh the pivot table without having to sign into Microsoft Dynamics SL. For more information see “Export to Microsoft Excel” on page 14.

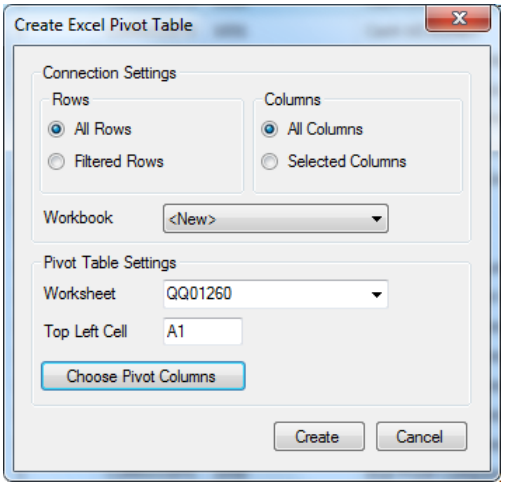


Figure 43: Create Excel Connection

All Rows

Runs the query without any restrictions on the rows, when the workbook is created and refreshed.

Filtered Rows

Runs the query with the same restrictions on the rows as in the query, when the workbook is created and refreshed.

All Columns

Includes all columns from the source SQL view, in the order they are defined in the view. Uses this for the creation and the refreshing of the data.

Selected Columns

Runs the query with the same restrictions on the columns as in the query, when the workbook is created and refreshed.

Workbook

Select from <New> or a workbook that you currently have open.

Worksheet

A name will default in **Worksheet** if you have selected <New> in **Workbook**. If you entered an existing Workbook, you will have the option to select any of the worksheets in workbook by clicking on the down arrow and selecting the worksheet.

Top Left Cell

Choose the cell location you would like the data to start populating.

Choose Pivot Columns

Opens *Choose Columns* screen and allows you to select the columns you would like displayed in your pivot table. For more information on using this screen, see “Choose Columns” on page 31.

Notes/Attachments

When a Quick query includes a note or attachment the text is not all viewable in the grid. Note text is truncated when viewing in the grid. You can hover over the text and get more information or you can open a window to get the complete text. Attachments are also able to be viewed from a window. For information how to view these notes and attachments see “Review a Note or Attachment” on page 13.

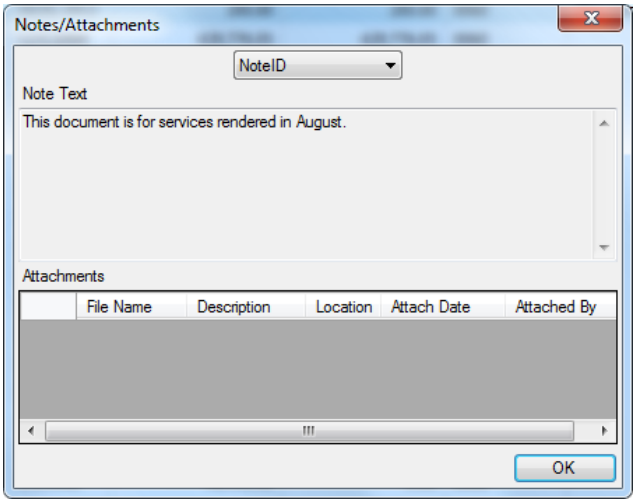


Figure 44: Create Excel Connection

Note Text

Note Text displays the entire note text for the document that you had selected.

Attachments

Attachments displays the File Name, a Description that was entered when created, Location of the Attachment, Attach Date and Attached By so that you.

OK

Click **OK** to close the screen.

Standard Base Query Views

The following is a list of the standard queries delivered with Microsoft Dynamics SL by functional area.

Administration

- Access Rights Details (QQ.SYU.AR) – provides a list of all access rights
- Query View Catalog Entries (QQ.SYQ.VC) – provides a list of all base query views and filtered query vies
- Companies (QQ.98.280) – provides a list of all companies within the system database

Financial

Accounts Payable

- 1099 Vendor Balances (QQ.AP.BAL) – provides a list of the 1099 balances for vendors
- AP Documents (QQ.030.10) – provides a list of all Accounts Payable documents
- AP Vouchers/Debits/Credits (QQ.030.1V) – provides a list of Accounts Payable vouchers, debits, and credits
- AP Pre-Payments (QQ.030.80) – provides a list of pre-payments for vendors and the voucher and/or credit adjustment to which they were applied
- Recurring Vouchers (QQ.032.60) – provides a list of Accounts Payable recurring vouchers
- AP Transactions (QQ.030.1D) – provides a list of all Accounts Payable transactions
- Vendor Addresses (QQ.032.72) - provides a list of vendor addresses
- Vendor Details (QQ.032.70) – provides a list of vendors
- Vendor History (QQ.032.71) – provides history balances by vendor and fiscal year

Accounts Receivable

- AR Documents (QQ.080.10) – provides a list of all Accounts Receivable documents
- AR Invoices/Debits/Credits (QQ.080.1V) – provides a list of Accounts Receivable invoices, debits, and credits
- AR Invoice Preview (QQ.082.20) – provides a list of Account Receivable invoices, debits, and credits in the left pane and a preview of the document's invoice form in the right pane. For more information about the invoice preview functionality, see the "Previewing Invoices, Debit Memos, and Credit Memos" topic in the Accounts Receivable Help or user's guide.
- Recurring Invoices (QQ.082.70) – provides a list of Accounts Receivable recurring invoices
- AR Transactions (QQ.080.1D) – provides a list of all Accounts Receivable transactions
- Customer Balances (QQ.082.00) – provides balances by customer
- Customer Details (QQ.082.60) – provides a list of customers
- Customer History (QQ.082.61) – provides history balances by vendor and fiscal year
- Salesperson History (QQ.083.11) – provides history balances by salesperson
- Shipping Addresses (QQ.082.62) - provides a list of shipping addresses by customer

Bank Reconciliation

- Bank Reconciliation (QQ.BR0.10) - provides a list of bank reconciliations

Cash Manager

- Cash Balances (QQ.202.00) - provides a list of cash balances by day by period
- Cash Transactions (QQ.200.10) - provides a list of cash transactions

General Ledger

- Accounts (QQ.012.60) – provides a list of accounts
- Account Summary and Budgets (QQ.013.00) – provides summary and budget information by account
- Account/Subaccount Combinations (QQ.013.20) – provides a list of the account and subaccount combinations
- Allocations (QQ.015.80) - provides a list of allocations
- Batches (QQ.014.00) – provides a list of all batches
- Journal Transactions (QQ.016.80) – provides a list of all General Ledger transactions
- Subaccounts (QQ.012.70) – provides a list of subaccounts

Payroll

- Earnings (QQ.020.6E) – provides a list of payroll earnings
- Deductions and Emp Ded Setup (QQ.020.6D) – provides a list of deductions and employee deduction setup
- Employees (QQ.022.50) – provides a list of employees
- Payroll Checks (QQ.027.80) – provides a list of checks
- Payroll Transactions (QQ.026.50) – provides a list of all Payroll transactions
- Payroll Deductions Transactions (QQ.026.5D) – provides a list of deduction transactions
- Payroll Earnings Transactions (QQ.026.5E) – provides a list of earnings transactions

Orders

Order Management

- Sales Orders (QQ.401.00) – provides a list of all sales orders
- Sales Order Lines (QQ.401.0L) – provides a list of all lines on sales orders
- Sales Order Shipping Schedule (QQ.401.0S) - provides a list of orders at the schedule level
- Shippers (QQ.401.10) – provides a list of all shippers
- Shipper Lines (QQ.401.1L) – provides a list of all lines on shippers

Purchasing

- Purchasing Receipt (QQ.040.10) – provides a list of all receipts and returns
- Purchasing Receipt Lines (QQ.040.1D) – provides a list of all lines on receipts and returns
- Purchase Orders (QQ.042.50) – provides a list of all purchase orders
- Purchase Order Lines (QQ.042.5D) – provides a list of all lines on purchase orders

Requisitions

- Requisition Item Request Header (QQ.R10.0) – provides a list of all item requests
- Requisition Item Request Details (QQ.RQ1.0D) – provides a list of all lines on item requests
- Item Request History (QQ.RQ1.0H) - provides a history of item requests

- Requisition Header (QQ.RQ1.10) - provides a list of requisitions
- Requisition Details (QQ.RQ1.1D) - provides a list of requisition details
- Requisition History (QQ.RQ1.1H) - provides a history of requisitions

Inventory

Bill of Materials

- BOM Transactions (QQ.110.10) – provides a list of bill of material production entry transactions

Inventory

- Inventory Items (QQ.102.50) – provides a list of all inventory items
- Inventory Transactions (QQ. 104.00) – provides a list of all Inventory transactions
- Inventory Receipts (QQ.100.10) – provides a list of all receipts in Inventory
- Inventory Issues (QQ.100.20) – provides a list of all issues in Inventory
- Inventory Adjustments (QQ.100.30) – provides a list of all adjustments in Inventory
- Inventory Transfers (QQ.100.40) – provides a list of all transfers in Inventory
- Inventory Kit Assemblies (QQ.100.50) – provides a list of all kit assemblies in Inventory
- Inventory Quantities and Cost Layers (QQ.ITC.ST) – provides a list of the quantities and costs by inventory item and cost layer
- Inventory History (QQ.ITH.ST) – provides history balances by inventory item and fiscal year
- Inventory Quantities by Site (QQ.102.55) – provides a list of quantities and costs by inventory item and site ID
- Inventory Quantities by Location (QQ.WHS.E) – provides a list of quantities by inventory item and warehouse bin location
- Inventory Quantities by Project (QQ.102.24) - provides a list of project allocated inventory quantities

Inventory Replenishment

- Average Daily Demand (QQ.IRA.DD) – provides a list of the average daily demand by inventory ID
- Addl Daily On-Hand Requirements (QQ.IRA.DR) - provides a list of additional daily on-hand requirements for inventory items
- Inv Replen Planned Orders (QQ.IRO.RD) - provides a list of planned orders for inventory item replenishment

Work Order

- Work Orders (QQ.122.5H) - provides a list of work orders
- Work Order Lines (QQ.122.5D) - provides a list of work order lines

Field Service

Service Dispatch

- Service Call (QQ.SD2.00) – provides a list of service calls
- Service Call History (QQ.SD2.07) – provides a history of service calls
- Service Call Detail (QQ.SD2.02) – provides a list service call details

- Service Invoice (QQ.SD6.50) – provides a list of invoices
- Service Employees (QQ.SD0.07) – provides a list of service employees

Service Contracts

- Service Contract (QQ.SN0.01) – provides a list of service contracts
- Service Contract Revenue Schedule (QQ.SN0.0R) - provides a list of service contract revenue schedules
- Service Contract Billing Schedule (QQ.SN0.0B) - provides a list of service contract billing schedules
- Service Contract Pricing (QQ.SN0.0P) - provides a lists of service contract pricing
- Service Contract Equipment (QQ.SN0.0E) - provides a list of service contract equipment
- Service Contract Profitability (QQ.SN0.13) – provides profitability information about service contracts

Equipment Maintenance

- Equipment History (QQ.SE0.12) – provides a history of service equipment
- Preventative Maintenance Schedule (QQ.SE0.08) - provides a list of service equipment preventative maintenance schedules

Flat Rate Pricing

- Flat Rates (QQ.SP0.00) – provides a list of service flat rate pricing

Project

Contract Management

- Contracts (QQ.PCO.NT) – provides a list of project-contract combinations
- Project Change Orders (QQ.PJC.HG) – provides a list of project change orders
- Subcontracts (QQ.PSU.BC) – provides a list of subcontract line items and headers
- Subcontract Change Orders (QQ.PSC.HG) – provides a list of subcontract change orders

Flexible Billings

- Billing Transactions (QQ.PJI.ND) – provides a list of draft/invoice detail lines
- Project Draft/Invoices (QQ.PJI.NV) – provides a list of drafts and invoices

Project Budgeting

- Budget Revisions (QQ.PJR.EV) – provides a list of project budget revisions

Project Controller

- Account Categories (QQ.ACC.TC) – provides a list of account categories
- Project Financial Summary (QQ.PSU.MM) – provides a list of project-to-date actuals, commitments, and budgets at the project level
- Project Tasks (QQ.PTA.SK) – provides a base view of all project task information
- Project Team (QQ.PTE.AM) – provides a list of project team members for each project
- Project Transactions (QQ.PJT.RN) – provides a list of project transactions
- Projects (QQ.PAP.RJ) – provides a list of all project header information
- Resources (QQ.EMP.LY) – provides a list of project resources

- Task Assignments (QQ.ASS.GN) – provides a list of employees assigned to tasks and their current status
- Task Financial Summary (QQ.TSU.MM) – provides a list of project-to-date actual, commitments, and budgets at the task level

Time and Expense for Projects

- Expense Reports (QQ.PJE.XP) – provides a list of expenses and advances
- Expense Audit Trail (QQ.PEA.UD) – provides a list of expense detailed audit information
- Time Audit Trail (QQ.PTA.UD) – provides a list of timecard detailed audit information
- Timecard Lines (QQ.PJT.IM) – provides a list of timecard lines

Connector

- Connector Queue File (QQ.MSP.QU) – provides a view of the connector queue
- Connector Project Problems (QQ.MSP.PR) – provides a list that shows the following four error conditions:
    1. An orphan XREF (no PJPROJ record, this is typical if a project that was entered in MSP was not published or abnormal if the project was published and the MSP service failed
    2. Integrated project without a GUID.
    3. Integrated project without an XREF (roundtrip failed).
    4. XREF with GUID but project integration flag is blank.
- Connector Task Problems (QQ.MSP.TK) – provides a list that shows the following four error conditions:
    1. An orphan XREF (no PJPENT record)
    2. Integrated task without a GUID.
    3. Integrated task without an XREF
    4. XREF with GUID but task integration flag is blank.
- Connector Assignment Problems (QQ.MSP.AS) – provides a list that shows the following three error conditions:
    1. An orphan XREF (no PJPENTEM record)
    2. Integrated PJPENTEM assignment record without a GUID.
    3. Integrated PJPENTEM assignment record without an XREF
- Connector Resource Problems (QQ.MSP.EM) – provides a list that shows the following four error conditions:
    1. An orphan XREF (no PJEMPLOY record)
    2. Integrated Employee without a GUID.
    3. Integrated Employee without an XREF
    4. XREF with GUID but employee integration flag is blank.

Foundation

Currency Manager

- Currency Balances (QQ.013.0C) - provides a list of currency balances in the transaction currency
- Currency Rates (QQ.242.70) - provides a list of currency rates

Developer's Guide

This section explains how to create custom Base Query Views. To create a custom Base Query View, you must do the following:

- Identify or Create an SQL Query View
- Create a Base Query View
- Add the Base Query View to the menu
- Assign Access Rights to the Base Query View

Identify or Create an SQL Query View

You can use an existing SQL view or create a new SQL view on which to base new Base Query Views. For information about how to create new views in SQL Server Management Studio, see the "Designing and Implementing Views" topic on MSDN at http://go.microsoft.com/fwlink/?LinkId=200739.

Note: If you create a new SQL view, you must run the *Synchronize All Ownership & Security* update scenario on the **Update Databases** tab in *Database Maintenance* (98.290.00). This lets the SQL view appear as a choice for new Base Query Views in *Quick Query Viewer* (QQ.VIE.00).

Create a Base Query View

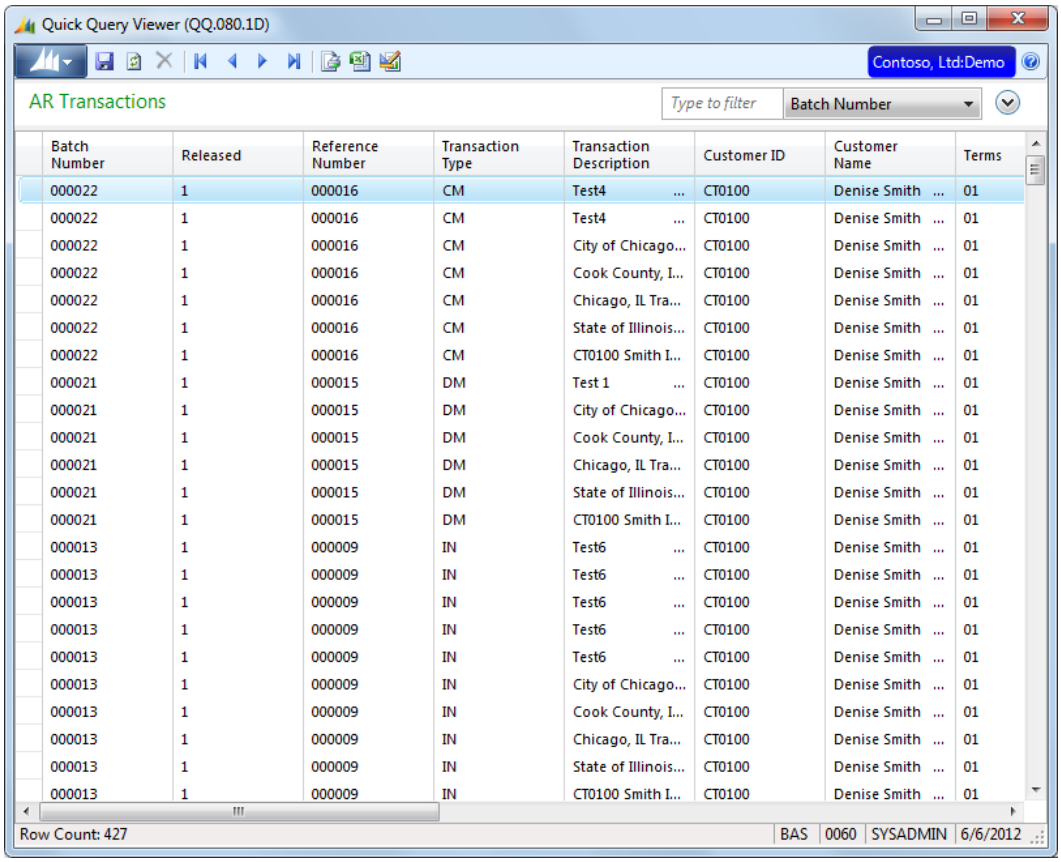
To create a new base query view, follow these steps:

1. Log on to Microsoft Dynamics SL as the SYSADMIN user or as a user who has Update or larger access rights to *Quick Query Viewer* (QQ.VIE.00).

   Note: This makes sure that you have opened *Quick Query Viewer* (QQ.VIE.00) in maintenance mode. You can confirm whether you are in maintenance mode or view mode by looking for the **New** icon. If the **New** icon appears in the menu, you are in maintenance mode.

2. Click **Administration**.

3. Under **Maintenance**, click **Quick Query Viewer**. *Quick Query Viewer* (QQ.VIE.00) appears.



Batch Number	Released	Reference Number	Transaction Type	Transaction Description	Customer ID	Customer Name	Terms
000022	1	000016	CM	Test4 ...	CT0100	Denise Smith ...	01
000022	1	000016	CM	Test4 ...	CT0100	Denise Smith ...	01
000022	1	000016	CM	City of Chicago...	CT0100	Denise Smith ...	01
000022	1	000016	CM	Cook County, I...	CT0100	Denise Smith ...	01
000022	1	000016	CM	Chicago, IL Tra...	CT0100	Denise Smith ...	01
000022	1	000016	CM	State of Illinois...	CT0100	Denise Smith ...	01
000022	1	000016	CM	CT0100 Smith I...	CT0100	Denise Smith ...	01
000021	1	000015	DM	Test 1 ...	CT0100	Denise Smith ...	01
000021	1	000015	DM	City of Chicago...	CT0100	Denise Smith ...	01
000021	1	000015	DM	Cook County, I...	CT0100	Denise Smith ...	01
000021	1	000015	DM	Chicago, IL Tra...	CT0100	Denise Smith ...	01
000021	1	000015	DM	State of Illinois...	CT0100	Denise Smith ...	01
000021	1	000015	DM	CT0100 Smith I...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Test6 ...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Test6 ...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Test6 ...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Test6 ...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Test6 ...	CT0100	Denise Smith ...	01
000013	1	000009	IN	City of Chicago...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Cook County, I...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Chicago, IL Tra...	CT0100	Denise Smith ...	01
000013	1	000009	IN	State of Illinois...	CT0100	Denise Smith ...	01
000013	1	000009	IN	CT0100 Smith I...	CT0100	Denise Smith ...	01

Figure 45: Quick Query Viewer (QQ.VIE.00)

4. Click **New** . *Select SQL View* appears.

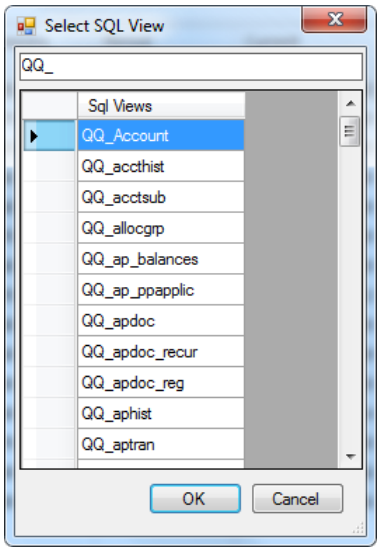


Figure 46: Select SQL View

5. Locate the SQL view that you want, and then click **OK**. The SQL view loads and the result set appears.

Note: To filter the Quick Query views enter QQ_ in the text box.

6. Click **Expand** , and then click Add Filter to specify any filters that you want to save as part of the Base Query View.
7. Hide any columns that you want available, but not immediately shown. See "Rename Column

To rename one column at a time, follow these steps:

1. Open a Base Query View.
2. Right-click the column header and then click **Rename Column**. The **Rename Column: <*Column Name*>** dialog box appears.

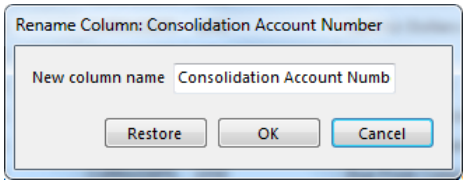


Figure 5: Rename Columns dialog box

3. Type the new name that you want to appear as the column header.
4. Remove Columns" on page 11.
5. Click **Save**. Save Base Query View appears.

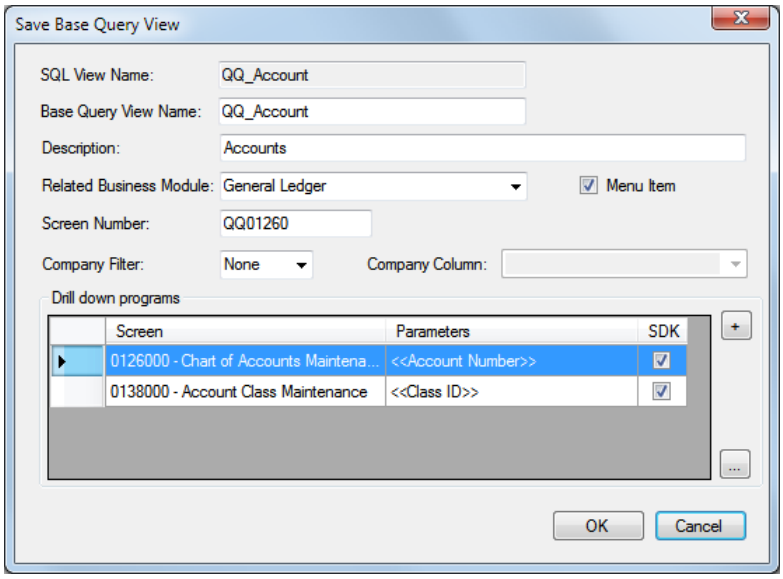


Figure 47: Save Base Query View

6. In **Base Query View Name**, specify a unique base query view name.
7. In **Description**, specify the description that you want to appear in *Quick Query Viewer* (QQ.VIE.00).
8. In **Related Business Module**, specify the module with which you want to associate the base query view. This controls what module the query preloads alongside in *Access Rights Maintenance* (95.270.00). **Related Business Module** also interfaces with Registration. For example, if you do not have the Inventory module unlocked in *Registration* (95.250.00), you will be unable to open Base Query Views or Filtered Query Views that are assigned to Inventory.
9. Click to select **Menu Item** if you want to include this base query view in the menu system.
10. In **Screen Number**, specify a unique screen number. This is the screen number to which you assign access rights.
11. In **Company Filter**, select one of the following values:
    - None
    - Current

- All

12. In **Company Column**, specify the name of the column that contains the company ID if you chose Current or All in step 11.
13. To specify drill down programs that you will be able to open from the query, click [+]. This lets you open a screen from the query results, and display that particular row from the query results in the screen. *Drill down parameters* appears.

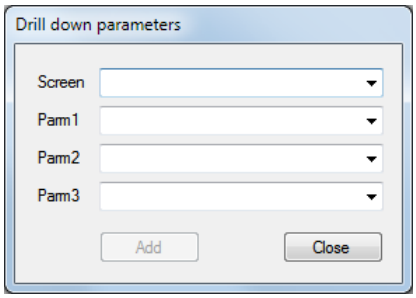


Figure 48: Drill down parameters

14. In **Screen**, select the screen from the list.
15. In **Parm1**, **Parm2**, and **Parm3**, specify the parameters that you must pass to the screen in order to successfully open the screen and load the data that is contained in the base query view result set. More than three (3) parameters per screen is not supported.
16. Click **Add**.

    Note: If you want to add more than one drill down screen, repeat step 14 through step 16. You can a total of four (4) drill down screens for each Base Query View.

17. Click **Close**, and then click **OK**.

Add the Base Query View to the menu

To add the Base Query View to a menu, see "Customizing Menus" in the System Manager user's guide.

Assign Access Rights to the Base Query View

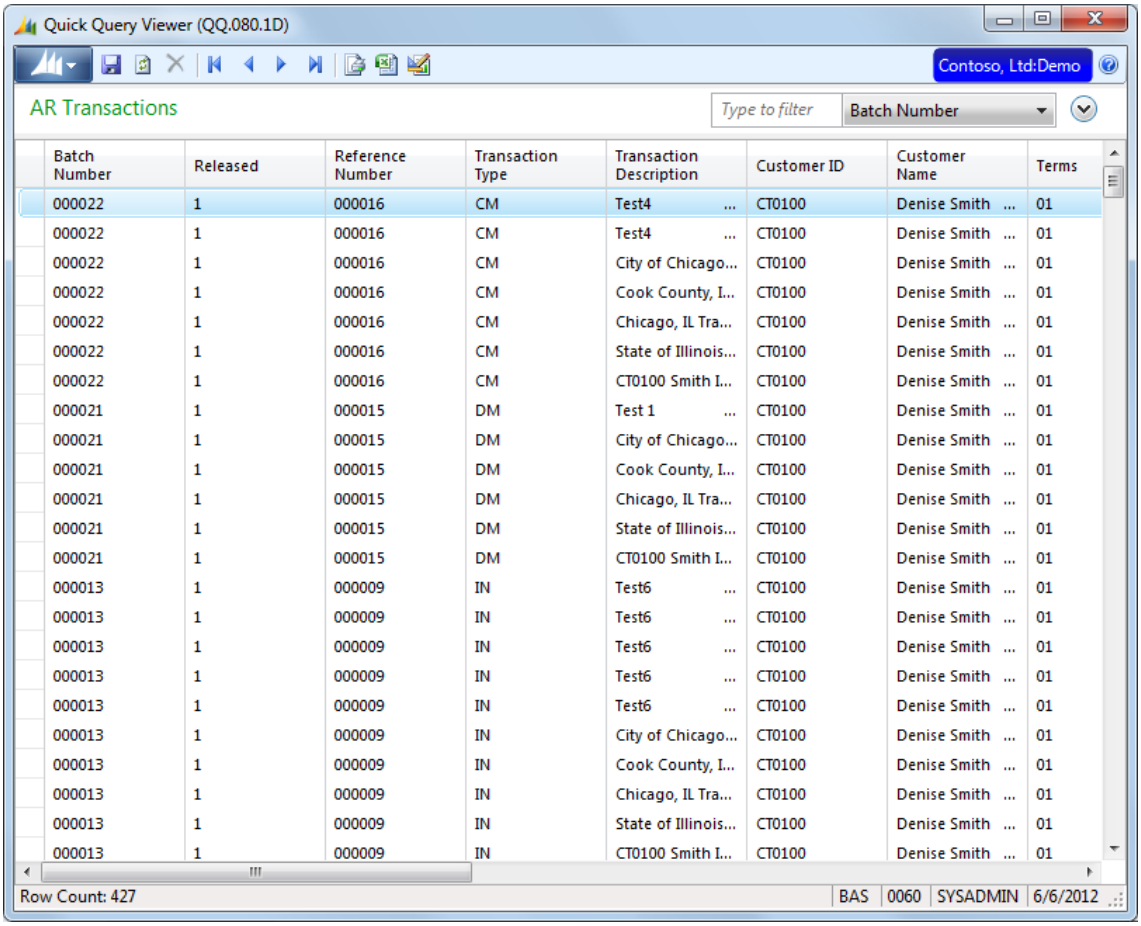
To assign access rights to a Base Query View, see "Assigning Access Rights" in the System Manager user's guide.

- **View** – lets the user view a specific base query view.
- **Insert** – View + lets the user create new filter query views.
- **Update** – View + Insert + lets the user change existing filter query views.
- **Delete** – View + Insert + Update + lets the user delete existing filter query views.
- **Initialize Mode** – lets the user refresh a Workbook that has been connected to a query view without having to be signed into Microsoft Dynamics SL. You must be using Windows authentication for this to work. For SQL authenticated databases you will be prompted for your SQL credentials.

Developer Reference

Quick Query Viewer (QQ.VIE.00)

Use *Quick Query Viewer* (QQ.VIE.00) to display and filter queries in view mode or to create or change base query views in maintenance mode.



Batch Number	Released	Reference Number	Transaction Type	Transaction Description	Customer ID	Customer Name	Terms
000022	1	000016	CM	Test4 ...	CT0100	Denise Smith ...	01
000022	1	000016	CM	Test4 ...	CT0100	Denise Smith ...	01
000022	1	000016	CM	City of Chicago...	CT0100	Denise Smith ...	01
000022	1	000016	CM	Cook County, I...	CT0100	Denise Smith ...	01
000022	1	000016	CM	Chicago, IL Tra...	CT0100	Denise Smith ...	01
000022	1	000016	CM	State of Illinois...	CT0100	Denise Smith ...	01
000022	1	000016	CM	CT0100 Smith I...	CT0100	Denise Smith ...	01
000021	1	000015	DM	Test 1 ...	CT0100	Denise Smith ...	01
000021	1	000015	DM	City of Chicago...	CT0100	Denise Smith ...	01
000021	1	000015	DM	Cook County, I...	CT0100	Denise Smith ...	01
000021	1	000015	DM	Chicago, IL Tra...	CT0100	Denise Smith ...	01
000021	1	000015	DM	State of Illinois...	CT0100	Denise Smith ...	01
000021	1	000015	DM	CT0100 Smith I...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Test6 ...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Test6 ...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Test6 ...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Test6 ...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Test6 ...	CT0100	Denise Smith ...	01
000013	1	000009	IN	City of Chicago...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Cook County, I...	CT0100	Denise Smith ...	01
000013	1	000009	IN	Chicago, IL Tra...	CT0100	Denise Smith ...	01
000013	1	000009	IN	State of Illinois...	CT0100	Denise Smith ...	01
000013	1	000009	IN	CT0100 Smith I...	CT0100	Denise Smith ...	01

Figure 49: Quick Query Viewer (QQ.VIE.00)

Select SQL View

Use *Select SQL View* to select the SQL view that you want to use as the basis for a Base Query View. For more information about *Select SQL View*, see “Create a Base Query View” on page 43.

Note: To filter the Quick Query views enter QQ_ in the text box.

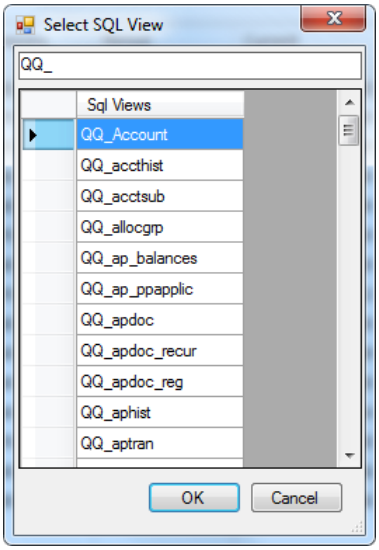


Figure 50: Quick Query Viewer (QQ.VIE.00), Select SQL View

Sql Views

Sql Views lists all available views in the Microsoft Dynamics SL application database.

OK

Click **OK** to accept the choice that you made.

Cancel

Click **Cancel** to close *Select SQL Views* without saving changes.

Save Base Query View

Use *Save Base Query View* to specify the name, description, and other information when you create a Base Query View. For more information about *Save Base Query View*, see "Create a Base Query View" on page 43.

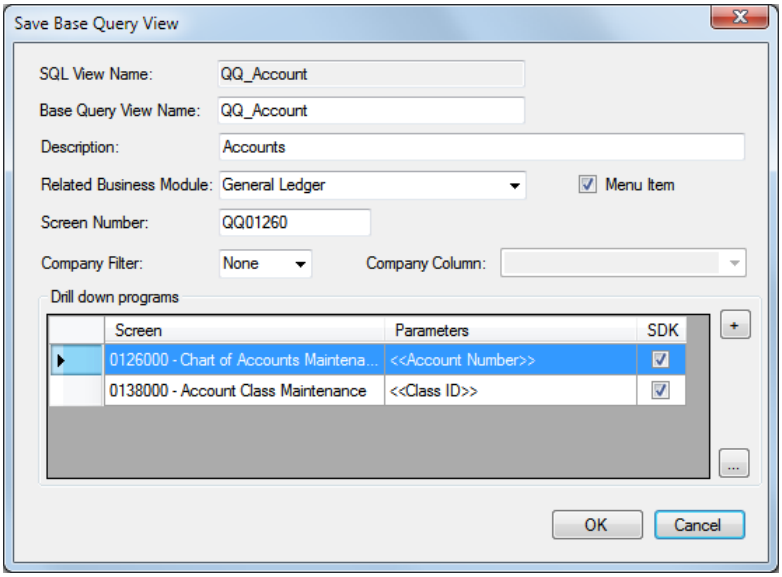


Figure 51: Quick Query Viewer (QQ.VIE.00), Save Base Query View

SQL View Name

SQL View Name contains the name of the SQL view. **SQL View Name** is display only.

Base Query View Name

Base Query View Name is the name that you assign to the Base Query View.

Description

Use **Description** to assign a longer description to the Base Query View. This name displays in *Quick Query Viewer* (QQ.VIE.00) in **View Selection**.

Related Business Module

Use **Related Business Module** to specify the module to which you want to assign the Base Query View. This controls the module that you use to preload access rights in *Access Rights Maintenance* (95.270.00). **Related Business Module** also interfaces with Registration. For example, if you do not have the Inventory module unlocked in *Registration* (95.250.00), you will be unable to open Base Query Views or Filtered Query Views that are assigned to Inventory.

Menu Item

Menu Item controls whether the Base Query View is available for inclusion in the menu system in *Menu Maintenance* (98.350.00).

Screen Number

Use **Screen Number** to assign a unique screen number to the Base Query View. Access rights are assigned based on this number in *Access Rights Maintenance* (95.270.00).

Company Filter

Use **Company Filter** to specify one of the following values:

- None - every company in the Application database
- Current - current logged-in company in the Application database
- All - all companies the current SL user has rights to

Company Column

Use **Company Column** to specify the column name that contains the company ID if you chose Current or All in **Company Filter**.

Drill down programs

Click **Drill down programs** to open the *Drill down parameter*s dialog box.

OK

Click **OK** to accept the choices that you made.

Cancel

Click **Cancel** to close *Save Base Query View* without saving changes.

Drill down parameters

Use *Drill down parameters* to specify the screen and the parameters for each screen that you want to open from the query when you create a Base Query View. For more information about *Drill down parameters*, see "Create a Base Query View" on page 43.

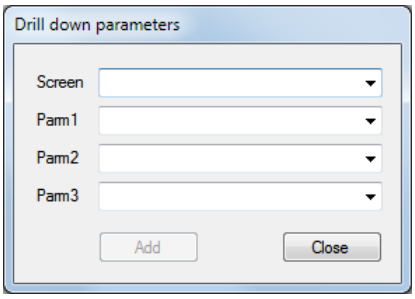


Figure 52: Quick Query Viewer (QQ.VIE.00), Drill down parameters

Screen

Screen lists available screens that you can open from a Base Query View or a Filtered Query View.

Parm1

Parm1 lists the column names available in the Base Query View.

Parm2

Parm2 lists the column names available in the Base Query View.

Parm3

Parm3 lists the column names available in the Base Query View.

Add

Click **Add** the screen and parameters.

Close

Click **Close** when you have finished adding drill down programs.

Choose Columns

Use *Choose Columns* to specify the columns that will be shown and the order of the columns. Do this when you view a Base Query View, view a Filtered Query View, when you create a new Base Query View, or when you change a custom Base Query View. For more information about *Choose Columns*, see “How to ” on page 10.

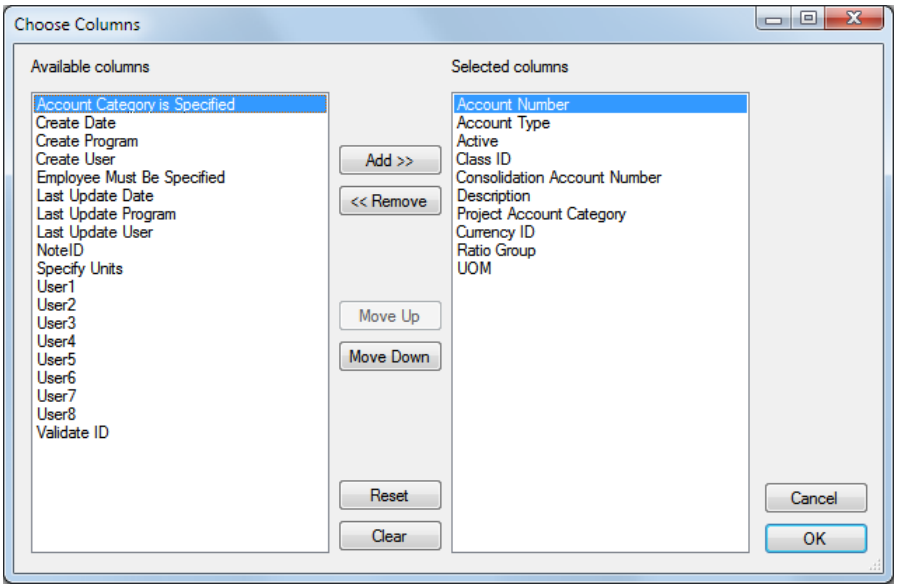


Figure 53: Quick Query Viewer (QQ.VIE.00), Choose Columns

Available columns

Available columns lists all the columns available in the SQL Query View, minus the columns that appear in **Selected columns**.

Selected columns

Selected columns contains the columns that are displayed when you view the Base Query View or Filtered Query View in *Quick Query Viewer* (QQ.VIE.00).

Add >>

Click **Add >>** to move the highlighted column from **Available columns** to **Selected columns**.

<< Remove

Click **<< Remove** to move the highlighted column from **Selected columns** to **Available columns**.

Move Up

Click **Move Up** to move the highlighted column upward in the list.

Move Down

Click **Move Down** to move the highlighted column downwards in the list.

Reset

Click **Reset** to reset the **Available columns** list and the **Selected columns** list to the default.

Clear

Click **Clear** to move all columns from **Available columns** to **Selected columns**.

OK

Click **OK** to accept the choice that you made.

Cancel

Click **Cancel** to close *Select Columns* without saving changes.

Save Filtered Query View

Use *Save Filtered Query View* to specify the name, description, and other information when you create a Filtered Query View. For more information about *Save Filtered Query View*, see "Creating and Working with Filtered Query Views" on page 19.

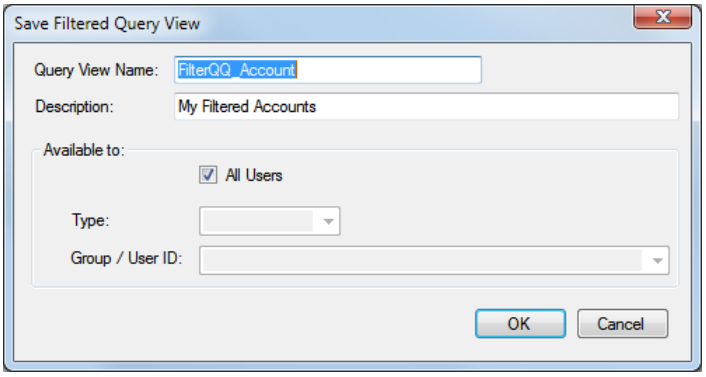


Figure 54: Quick Query Viewer (QQ.VIE.00), Save Filtered Query View

Query View Name

Use **Query View Name** to specify a unique name for the query.

Description

Description contains a longer description of the Filtered Query View.

Available to area

All Users

Select **All Users** to make the Filtered Query View available to all users who have permissions to the related Base Query View.

Type

Use **Type** to specify whether the Filtered Query View is available to a User or a Group if you cleared **All Users**.

Group / User ID

Use **Group / User ID** to specify the group ID or the user ID that has permissions to view this Filtered Query View if you cleared **All Users**.

OK

Click **OK** to accept the choice that you made.

Cancel

Click **Cancel** to close *Save Filtered Query View* without saving changes.

Glossary of Terms

SQL Query View

Refers to the SQL database views which present a more user-friendly representation of the underlying tables and columns. These views can be based on a single table or a join of multiple tables.

Base Query View

Points to an SQL Query View and contains information that is required to display that view in Quick Query. Base Query Views are created by Microsoft Dynamics SL and by expert users by using *Quick Query Viewer* (QQ.VIE.00).

Filtered Query View

Refers to the result of a user changing a Base Query View by applying filters, sorting, and columns specifications (hiding, ordering, naming). The Filtered Query View has its own name, description, and is typically a subset of the Base Query View columns or records.

Drill Down Program

The programs or applications defined as part of a Base Query View, for the purpose of opening the application from the Base Query View result set to view the record.

Related Business Module

Used to categorize Base Query Views in *Access Rights Maintenance* (95.270.00), for preloading of access rights. **Related Business Module** also interfaces with Registration. For example, if you do not have the Inventory module unlocked in *Registration* (95.250.00), you will be unable to open Base Query Views or Filtered Query Views that are assigned to Inventory.

Menu System

The collection of menus a user views when they log on to Microsoft Dynamics SL. It is a combination of all the menus defined for groups with which the user is associated.

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