

Long Business Systems, Inc

Management Software Solutions

We help businesses manage for success

Cleveland – Columbus – Cincinnati - Pittsburgh



LBSi Monthly Webinar Series: September 2016 Introduction to Queries – Part 1

Presented by: Keith Taylor, Vice President LBSi

Agenda:

- Authorizations
- Query Manager
- Table / Field Names
- Query Wizard
- Query Generator
- Query Menu Structure
- Tip of the Day



Authorizations

- Authorizations required:
 - Query Generator
 - New Queries
 - Create / Edit Categories (Sub menus)
 - Create/Run Saved Queries corresponding to sub menus (Full, View, None)
 - Execute Non-select SQL Statement (Full, None)
 - Modify SQL Statement (Full, None)
 - Query Wizard (Full, None)
 - Query Manager (Full, Read, None)



Query Manager

- Can be used to access queries
- Maintenance of query menus
 - Add new menu options
 - Organize menus
 - Delete queries
 - Query Groups for authorizations
 - Authorization Groups noted in Menu names



Table and Field Names

- Turn on System information to be able to determine table and field names (Tool Bar → View → System information)
- Hover over fields (not the labels) to determine table and field names.
- Tables – 4 digits (alpha-numeric)
- Marketing document table structure
 - Purchase order – OPOR
 - Purchase order line – POR1 (drop the first letter of OPOR and add 1)
 - AR Invoice – OINV
 - Invoice Line – INV1 (drop the first letter of OINV and add 1)
 - Sales Order – ORDR
 - Sales Order Line – RDR1 (drop the first letter of ORDR and add 1)



Query Wizard

- Guides users through the process of creating a “simple” query (step 1 of 5)
- Select Tables (step 2 of 5)
- Select Fields - Can choose multiple fields at one time (step 3 of 5)
- Sorting Options for fields (step 3 of 5)
- Choose “key” fields even when not needed so that golden arrows are available
- Group (Y/N) *[Discussed in future session]*
- Compare Fields (Total Records, Amount, Average, Minimum, Maximum *[Discussed in future session]*)



Query Wizard (continued)

- Display Conditions and Relations (filters in the query) (step 4 of 5)
 - Business partner – customers only
 - Items – certain item groups
 - Documents – certain statuses
 - Use of field values
 - Use of and / Or for multiple conditions
 - Summary step – displays query (Step 5 of 5)



Query Wizard (continued)

- Review Query
 - Query Edit Mode
 - Explanation of query, tables, and fields
 - Add (NOLOCK) after table names
 - Double click to sort on columns
- Saving Queries



Query Generator

- Used more by intermediate users as opposed to the Query Wizard which is more for beginners to queries
- Similar to Query Wizard without the wizard
- Same structure of building the query with the following key areas:
 - Select: Choose the fields from the table selected
 - Fields in bold are contained in additional tables such as the item group table in order to display the name of the item group
 - From: Auto filled in with table name from your selection
 - Where: Item group = certain group, business partner = customer type, etc.



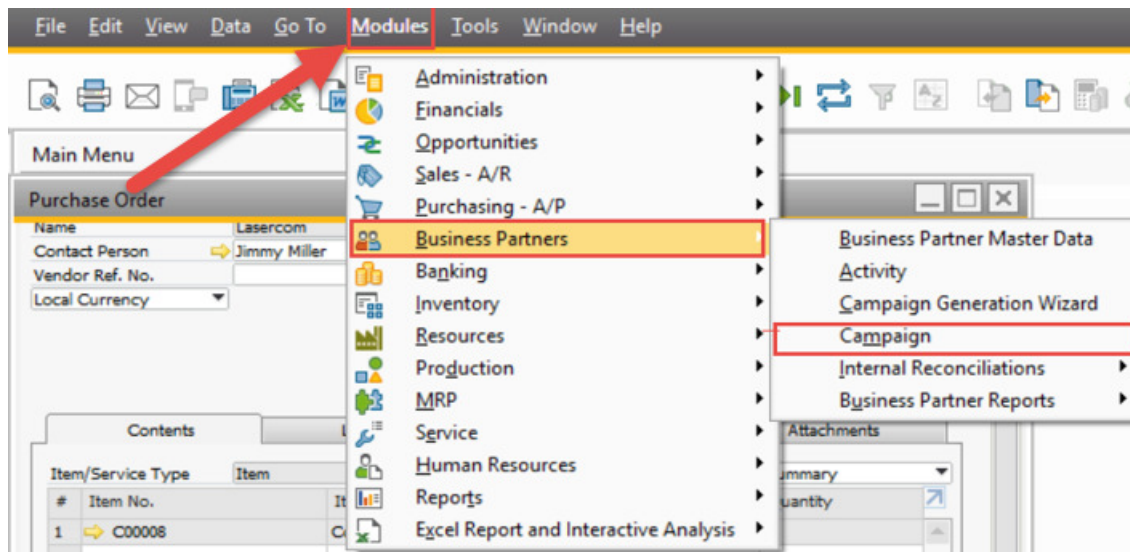
Query Generator (continued)

- Sort by: Define how you want the query sorted
 - Multiple sorts can be chosen with comma in between each field
- Group By: *[advanced usage will be covered in later session]*
- Execute: click to execute the query
- Add (NOLOCK) after table names as covered in the Query Wizard section
- Display is the same as if the query was generated using the Query Wizard



Tip of the Day – Menu Structure

- Use the SAP Business One menu structure in the Tool Bar menu to avoid having to minimize screens in order to see the SAP Main menu (normally on the left hand side of your screen):



Long Business Systems, Inc. (LBSi)

- **Next Meetings:**

- Tuesday, October 11, 2016
 - Introduction to Queries – Session 2
- Tuesday, November 8, 2016
 - Posting Periods

Plan to attend the User conference:



ASUG SAP Business One Conference

September 26-28, 2016
Hilton Miami Downtown
1601 Biscayne Blvd.
Miami, FL 33132



Thank you for taking time to participate in the SAP Business One User Group Meeting.

Please take a few minutes to provide us with feedback and suggestions going forward.

- We are always looking for new clients to work with. And we would like to find more clients and partners like you – companies that are engaged, smart, and focused on their future.
- Can you help us out by referring LBSi to someone who could benefit from our services?



Thank You

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