::: SunPlus

Q&A Executive Training Prompts I

In this lesson, you will be introduced to the concept of prompts.

We will use the Analysis of Employee Expenses report we have been working with in the last few lessons.

This report is very nice, but it is limited in use, because it was prepared for a specific Business Unit, the ATA Business Unit, and it was prepared to extract data for the years 2013 and 2014.

What if we wanted to use the report for other business units or dates? In the report's current formatting, we would have to go in and make changes every time we wanted to run it for a different business unit or period. This is where prompts come into play.
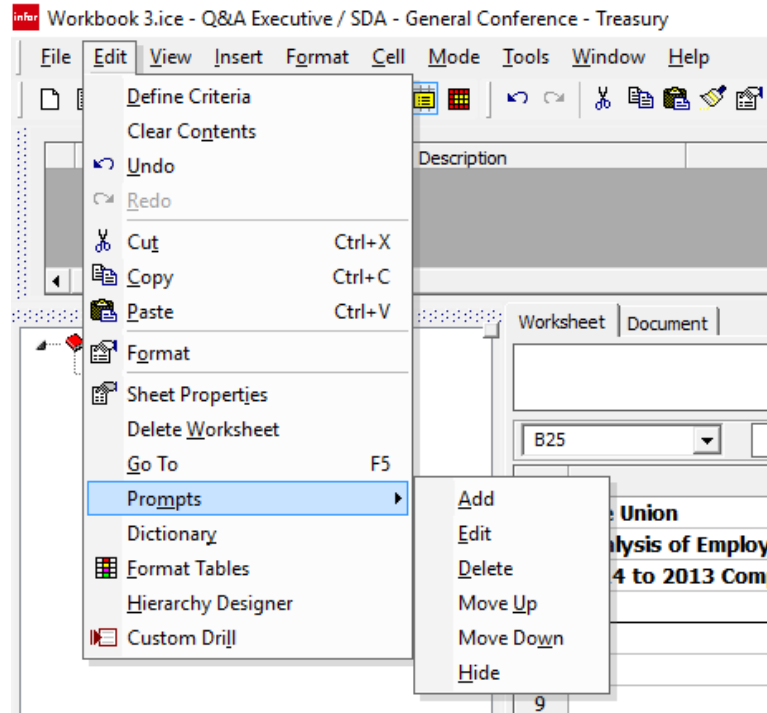
Prompts

The gray pane extending across the top of the Executive workspace is the prompt section. It is where prompts are created, displayed, and then used.
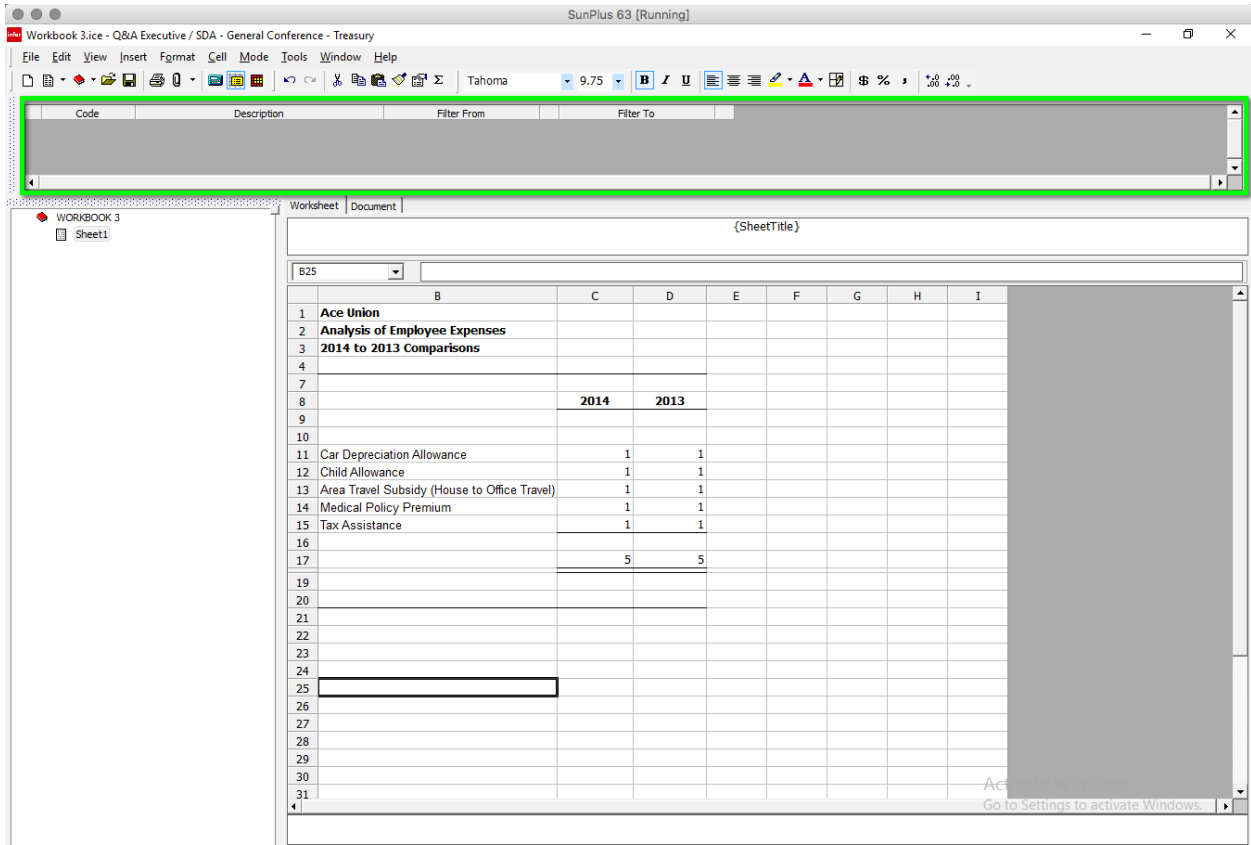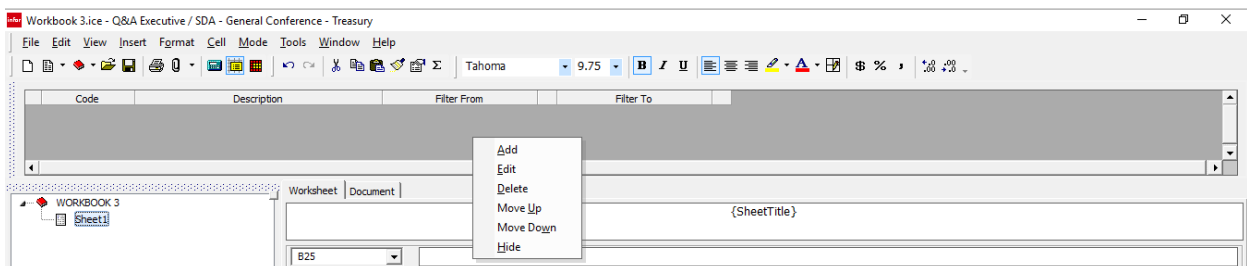

Add a Prompt

There are two ways to add a prompt:
1. Edit > Prompt > Add
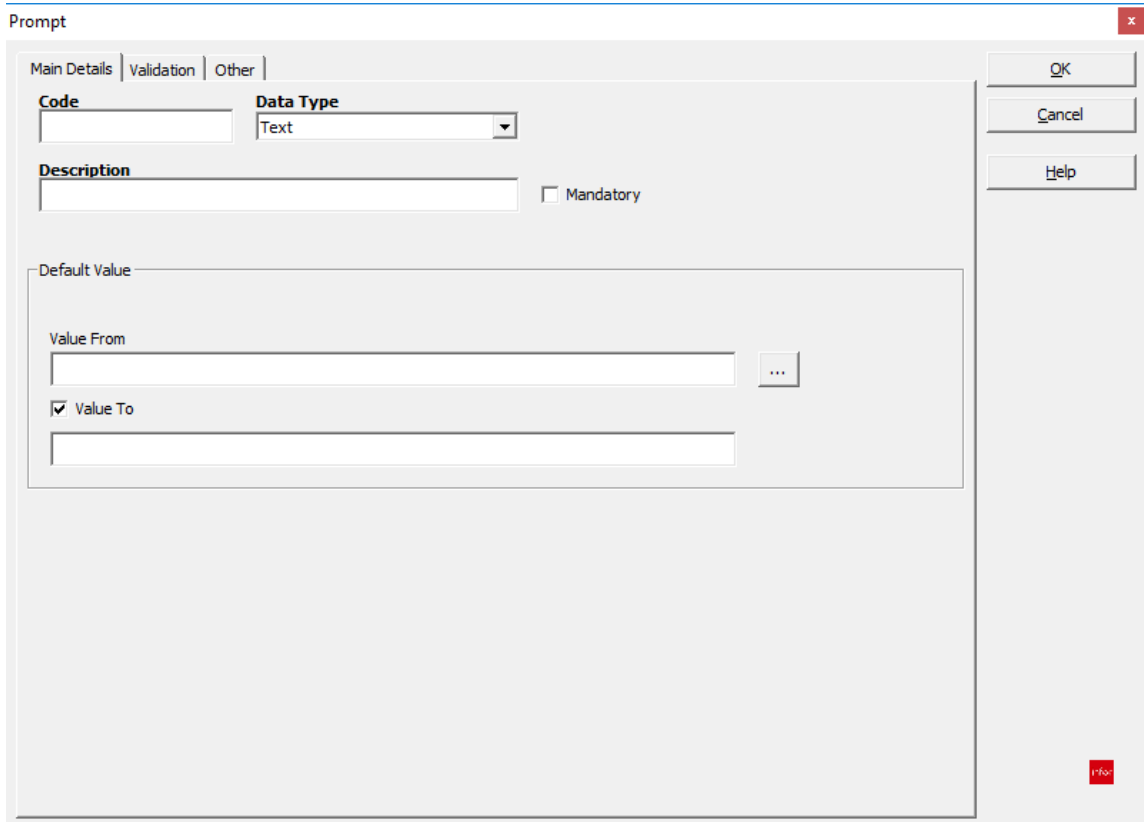
2. Right-click in the Prompt pane > Add

The following dialog will be displayed:

3. Enter a Code for the prompt – enter anything you want as the Code; however, when the prompts are displayed in the Prompt Pane, you may notice that having a Code that is descriptive may be helpful.
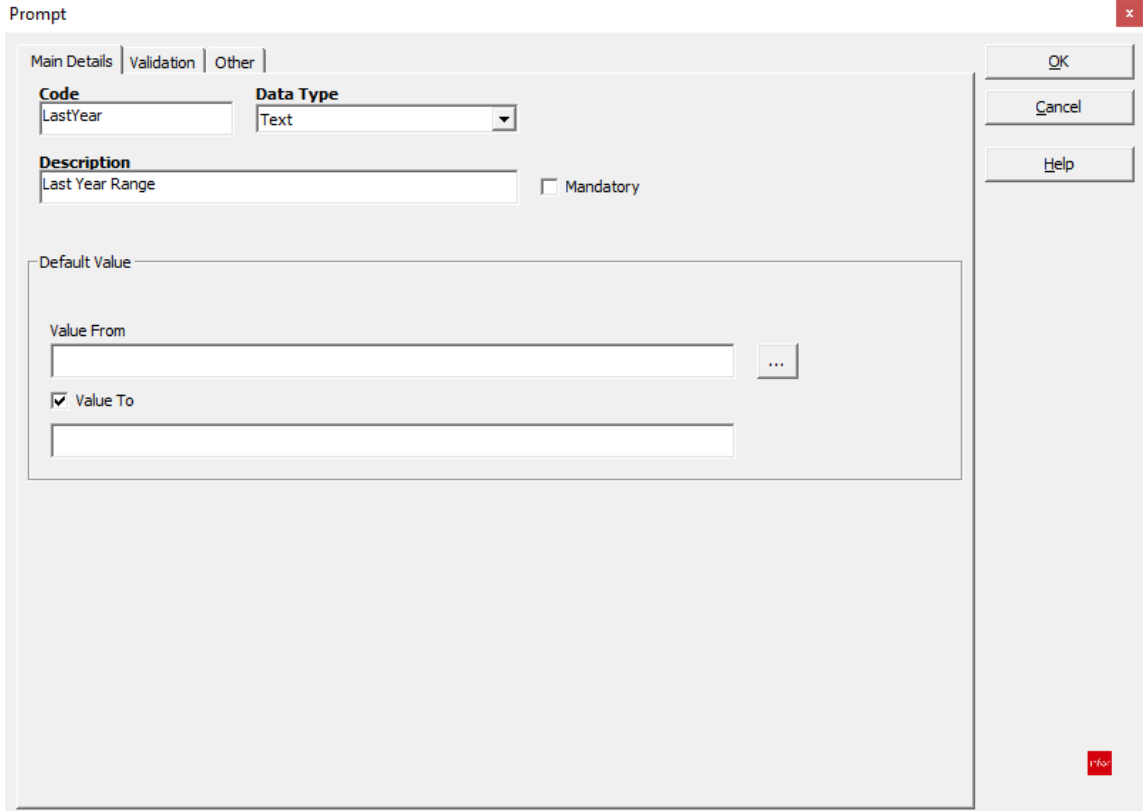
4. Enter a Description for the prompt

We will set a Default Value for each prompt we create. Let's be sure we understand the role of the default value:

- A value presented in the prompt until the operator replaces it with some other value.
- It should give the operator an idea of what the input is supposed to look like.
- It should help the operator know how to enter the data value needed for the report.

For our first prompt, let's enter a default value range of 2013001 to 2013012 for last year.

We will cover the Data Type in our next lesson. We can click OK to save our settings.

5. Click OK

Notice: The prompt has been created and placed in the Prompt section. It is ready for use.

Current Year Prompt

We will add a second prompt. We want to be able to prompt for the current year.

We will repeat the steps we took for the first prompt.

6. Click the Edit menu
7. Select Prompts
8. Select Add
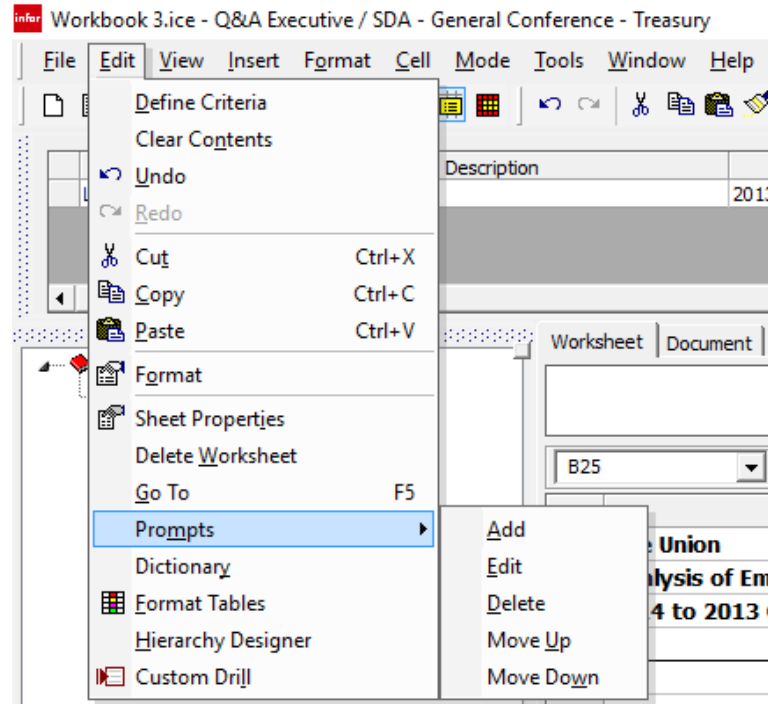
One trick for naming prompts is to make them an instruction that tells the user what to do. This way, you can help the operator who is unfamiliar with Q&A know what is expected of him.

9. Enter a Code of 'CurrentYear'
10. Enter a Description of 'Enter Current Year Range'
11. Enter Value From of '2014001'
12. Enter Value To of '2014012'

Prompt

Main Details | Validation | Other

Code
CurrentYear

Data Type
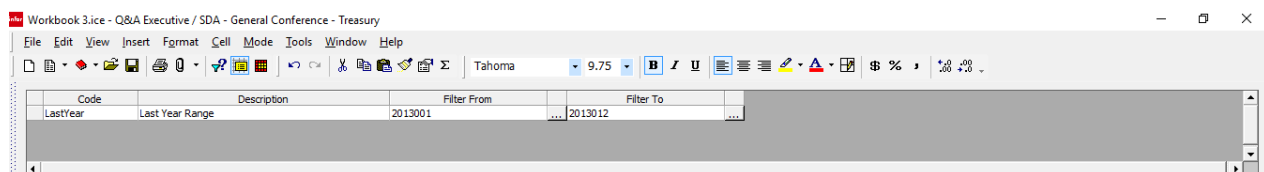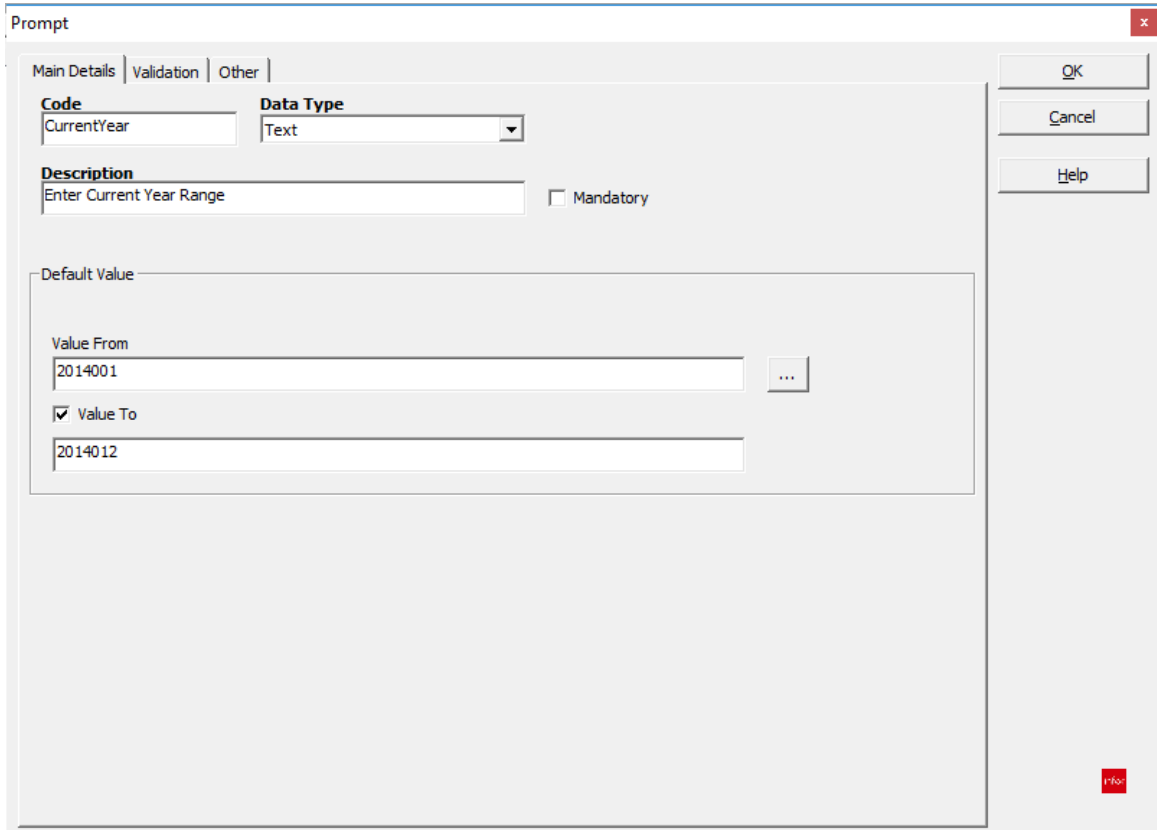Text

Description
Enter Current Year Range   ☐ Mandatory

Default Value

Value From
2014001   ...

☑ Value To

2014012

OK
Cancel
Help

13. Click OK

Code	Description	Filter From		Filter To	
LastYear	Last Year Range	2013001	...	2013012	...
CurrentYear	Enter Current Year Range	2014001	...	2014012	...

Now we have two prompts in the Prompt Pane.

We are not quite ready to begin modifying the report, however, because the actual cells comprising the report are still programmed specifically for a specific range of dates. We need to revise the cell formatting.

Linking Prompts to Cell Queries

We are going to change the formatting in cells C11 and D11 and then copy that formatting to all of the other cells.

14. Double-click cell C11

We are working on Period ranges, so we are interested in the Accounting Period filter of the query. The current formatting picked up the period from cells hidden in the worksheet. We want to change that so that the value it extracts from the system will be the value the operator requests in the prompt.

15. Click on the Accounting Period row in the Filter pane

Summary Link

Data Type	Summary Link ▾						C11

Definition | Options

Filter

Filter From	=C$5	...	2014001			Link Code
Filter To	=C$6		2014012			

Description	Filter From	Filter To	Value From	Value To	Link Code	
Product	SunSystems 6		SunSystems 6			
Business Unit	ATA		ATA			
Table	LA		Ledger			
Ledger	A		A			
Account Code	=$A11		811220			
Accounting Period	=C$5	=C$6	2014001	2014012		

⌃

Selection List

- **Ledger**
- **Account Code**
- ⊞ CA Chart of Accounts
- **Accounting Period**
- Base Amount
- Debit/Credit
- Transaction Amount
- ⊞ RT
- Base 2/Reporting Amount
- ⊞ RT2
- Memo Amount
- Base Currency Code
- Transaction Currency Code
- ⊞ CN Transaction Currency Code
- 2nd Base/Reporting Currency Code
- Rate
- Transaction Operator

Output

Item	Target Cell	
Σ LA\Base Amount	C11	

Help	OK	Cancel

16. Click in the Filter From field
17. Delete the value in the Filter From field

Summary Link

| Data Type | Summary Link ▾ | | | | | C11 |

Definition | Options

Filter

| Filter From | | | ... | | | Link Code |
| Filter To | =C$6 | | 2014012 | | | |

Description	Filter From	Filter To	Value From	Value To	Link Code	
Product	SunSystems 6		SunSystems 6			
Business Unit	ATA		ATA			
Table	LA		Ledger			
Ledger	A		A			
Account Code	=$A11		811220			
Accounting Period		=C$6		2014012		

Selection List

- **Ledger**
- **Account Code**
- ⊞ CA Chart of Accounts
- **Accounting Period**
- Base Amount
- Debit/Credit
- Transaction Amount
- ⊞ RT
- Base 2/Reporting Amount
- ⊞ RT2
- Memo Amount
- Base Currency Code
- Transaction Currency Code
- ⊞ CN Transaction Currency Code
- 2nd Base/Reporting Currency Code
- Rate
- Transaction Operator

Output

Item	Target Cell
Σ LA\Base Amount	C11

| Help | OK | Cancel |

18. While the focus is still on the Filter From field, click on the CurrentYear prompt in the Prompt pane

Notice: Now the value in the Filter From field is =(CurrentYear)

19. Click in Filter To field
20. Delete the value in the Filter To field

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Summary Link

| Data Type | Summary Link | | C11 |

Definition | Options

Filter

Filter From   =(CurrentYear)   ... 2014001

Filter To

Link Code

Description	Filter From	Filter To	Value From	Value To	Link Code
Product	SunSystems 6		SunSystems 6		
Business Unit	ATA		ATA		
Table	LA		Ledger		
Ledger	A		A		
Account Code	=$A11		811220		
Accounting Period	=(CurrentYear)		2014001		

Selection List

- Ledger
- **Account Code**
- CA Chart of Accounts
- **Accounting Period**
- Base Amount
- Debit/Credit
- Transaction Amount
- RT
- Base 2/Reporting Amount
- RT2
- Memo Amount
- Base Currency Code
- Transaction Currency Code
- CN Transaction Currency Code
- 2nd Base/Reporting Currency Code
- Rate
- Transaction Operator

Output

Item	Target Cell	
Σ LA\Base Amount	C11	

Help   OK   Cancel

21. While the focus remains on the Filter To field, click in the Filter To field of the CurrentYear prompt in the Prompt Pane

Notice how the Filter From and Filter To values are displayed:
- The start of the range, Filter From, is enclosed in single parentheses
- The end of the range, Filter To, is enclosed in double parentheses

Notice also that at the immediate right of the From and To fields, in blue font, are displayed the default values that we set up for the CurrentYear prompt.

22. Click OK
23. Click in cell D11

24. Select the Accounting Period row in the Filter Pane

25. Click in the Filter From field
26. Delete the value in the Filter From field

SunPlus

Summary Link

| Data Type | Summary Link ▾ | | | | | D11 |

Definition | Options

Filter

Filter From [ ] [...]   Link Code

Filter To **=D$6**   2013012   [ ]

Description	Filter From	Filter To	Value From	Value To	Link Code	
Product	SunSystems 6		SunSystems 6			
Business Unit	ATA		ATA			
Table	LA		Ledger			
Ledger	A		A			
Account Code	=$A11		811220			
Accounting Period		=D$6		2013012		

Selection List

- **Ledger**
- **Account Code**
- CA Chart of Accounts
- **Accounting Period**
- Base Amount
- Debit/Credit
- Transaction Amount
- RT
- Base 2/Reporting Amount
- RT2
- Memo Amount
- Base Currency Code
- Transaction Currency Code
- CN Transaction Currency Code
- 2nd Base/Reporting Currency Code
- Rate
- Transaction Operator

Output

Item	Target Cell	
Σ LA\Base Amount	D11	

Help   OK   Cancel

27. Click on the Filter From field in the LastYear prompt

Summary Link

| Data Type | Summary Link | | | | | D11 |

Definition | Options

Filter

| Filter From | =(LastYear) | ... | 2013001 | Link Code |
| Filter To | =D$6 | | 2013012 | |

Description	Filter From	Filter To	Value From	Value To	Link Code	
Product	SunSystems 6		SunSystems 6			
Business Unit	ATA		ATA			
Table	LA		Ledger			
Ledger	A		A			
Account Code	=$A11		811220			
Accounting Period	=(LastYear)	=D$6	2013001	2013012		

Selection List

- **Ledger**
- **Account Code**
- ⊞ CA Chart of Accounts
- **Accounting Period**
- Base Amount
- Debit/Credit
- Transaction Amount
- ⊞ RT
- Base 2/Reporting Amount
- ⊞ RT2
- Memo Amount
- Base Currency Code
- Transaction Currency Code
- ⊞ CN Transaction Currency Code
- 2nd Base/Reporting Currency Code
- Rate
- Transaction Operator

Output

Item	Target Cell
Σ LA\Base Amount	D11

Help   OK   Cancel

28. Click in the Filter To field
29. Delete the value in the Filter To field
30. Click in the Filter To field of the LastYear prompt in the Prompt Pane

Cells C11 and D11 have now been reformatted to reflect the Prompt values. We can copy those queries and paste them into cells with similar queries.

31. Highlight cells C11 and D11

32. Right-click

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	Code	Description	Filter From		Filter To	
	LastYear	Last Year Range	2013001	...	2013012	...
	CurrentYear	Enter Current Year Range	2014001	...	2014012	...

Worksheet | Document
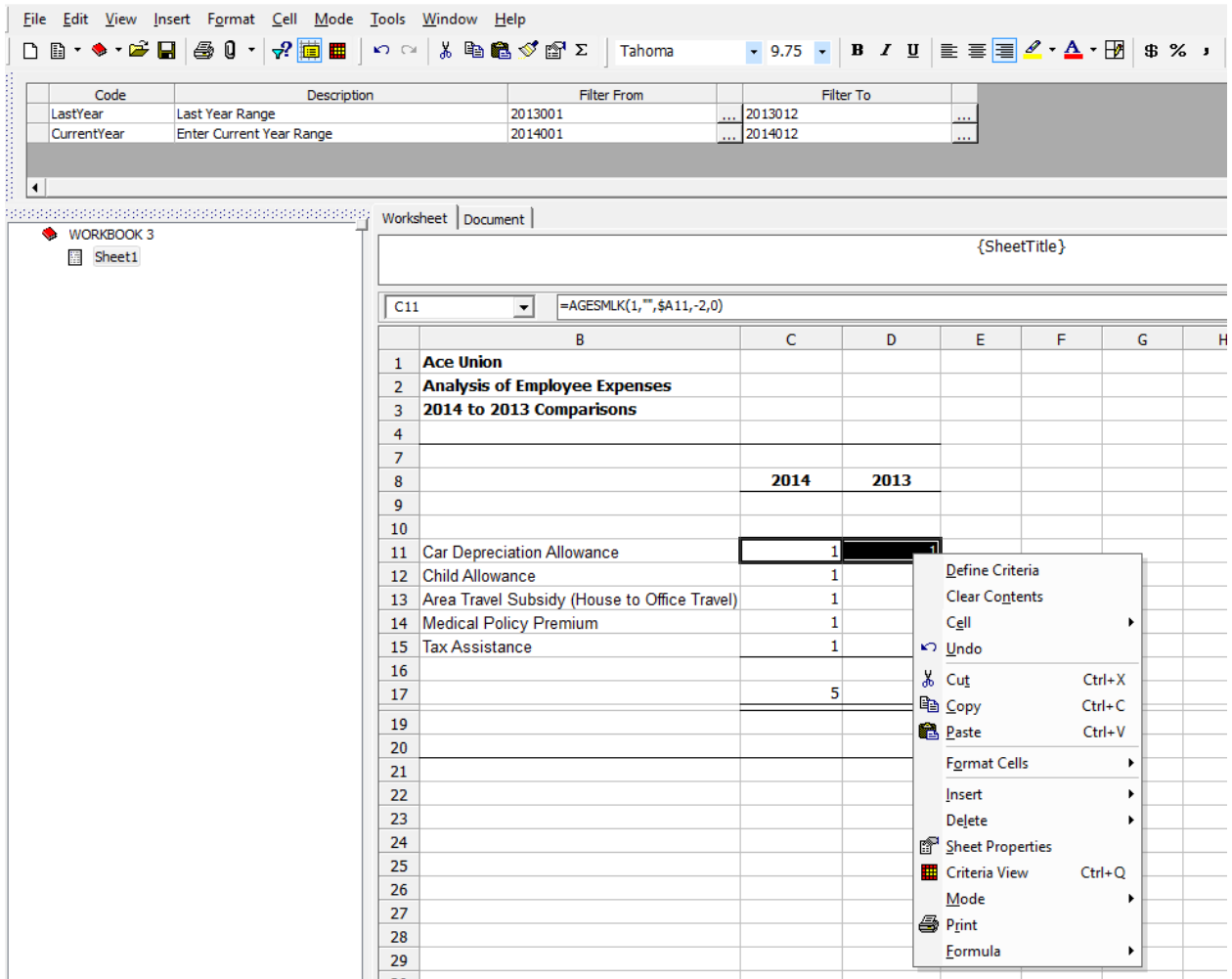
{SheetTitle}

C11   =AGESMLK(1,"",$A11,-2,0)

	B	C	D	E	F	G	H
1	**Ace Union**						
2	**Analysis of Employee Expenses**						
3	**2014 to 2013 Comparisons**						
4							
7							
8		**2014**	**2013**				
9							
10							
11	Car Depreciation Allowance	1	1				
12	Child Allowance	1					
13	Area Travel Subsidy (House to Office Travel)	1					
14	Medical Policy Premium	1					
15	Tax Assistance	1					
16							
17		5					
19							
20							
21							
22							
23							
24							
25							
26							
27							
28							
29							

Right-click menu:
- Define Criteria
- Clear Contents
- Cell ▶
- ↶ Undo
- ✂ Cut   Ctrl+X
- 📋 Copy   Ctrl+C
- 📋 Paste   Ctrl+V
- Format Cells ▶
- Insert ▶
- Delete ▶
- Sheet Properties
- Criteria View   Ctrl+Q
- Mode ▶
- Print
- Formula ▶

33. Select Copy (or use Ctrl+C)

34. Highlight cells C12 through D15

35. Right-click

36. Select Paste (or use Ctrl+V)

	Worksheet	Document					
						{SheetTitle}	

C12	▼	=AGESMLK(1,"",$A12,-2,0)

	B	C	D	E	F
1	**Ace Union**				
2	**Analysis of Employee Expenses**				
3	**2014 to 2013 Comparisons**				
4					
7					
8		**2014**	**2013**		
9					
10					
11	Car Depreciation Allowance	1	1		
12	Child Allowance	1	1		
13	Area Travel Subsidy (House to Office Travel)	1	1		
14	Medical Policy Premium	1	1		
15	Tax Assistance	1	1		
16					
17		5	5		
19					
20					
21					

We have now copied our reformatted queries into cells C12 through D15. We can check our work.

37. Double-click in cell C14

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Summary Link						
Data Type	Summary Link					**C14**
Definition	Options					

Filter

Filter From: SunSystems 6 ... SunSystems 6

Description	Filter From	Filter To	Value From	Value To	Link Code	
Product	SunSystems 6		SunSystems 6			
Business Unit	ATA		ATA			
Table	LA		Ledger			
Ledger	A		A			
Account Code	=$A14		816110			
Accounting Period	=(CurrentYear)	=((CurrentYear))	2014001	2014012		

Selection List

- **Ledger**
- **Account Code**
- CA Chart of Accounts
- **Accounting Period**
- Base Amount
- Debit/Credit
- Transaction Amount
- RT
- Base 2/Reporting Amount
- RT2
- Memo Amount
- Base Currency Code
- Transaction Currency Code
- CN Transaction Currency Code
- 2nd Base/Reporting Currency Code
- Rate
- Transaction Operator

Output

| Item	Target Cell	
Σ LA\Base Amount	C14	

Help   OK   Cancel

We can see that the Accounting Period is set for the prompt, and that the target cells are C14.

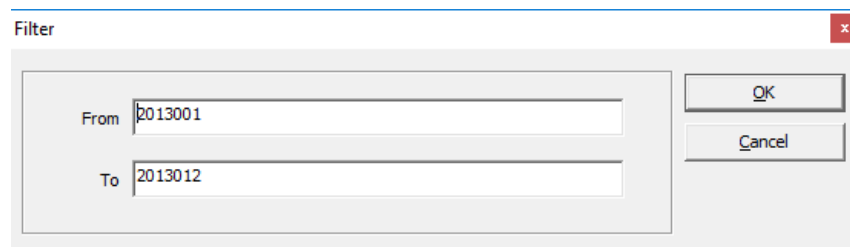We are now ready to extract this report and see the results.

Extract

If you look closely at the icons on the toolbar, you will see a new icon. This is the Query Prompt icon 🔽? When we want to Extract in a report that uses Prompts, there is an additional step.

38. Click the Query Prompt icon 🔽?
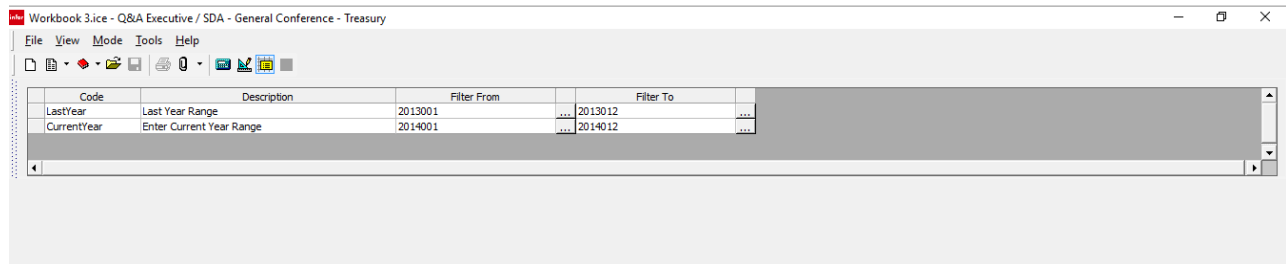
The Prompt screen gives the operator a chance to change the ranges, in this case the Accounting Period range, that he wants for his report.

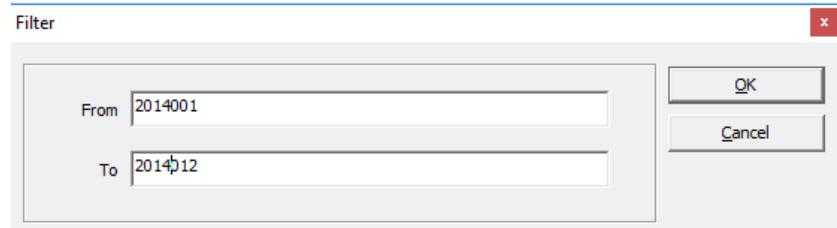   39. Click on the beginning period for last year

    40. Fill in the From value '2014001'
    41. Fill in the To value '2014012'

    42. Click OK
    43. Click the beginning period for the current year

    44. Fill in the From value 2015001
    45. Fill in the To value '2015012'

Filter

From `2015001`

To `2015012`

OK
Cancel

46. Click OK

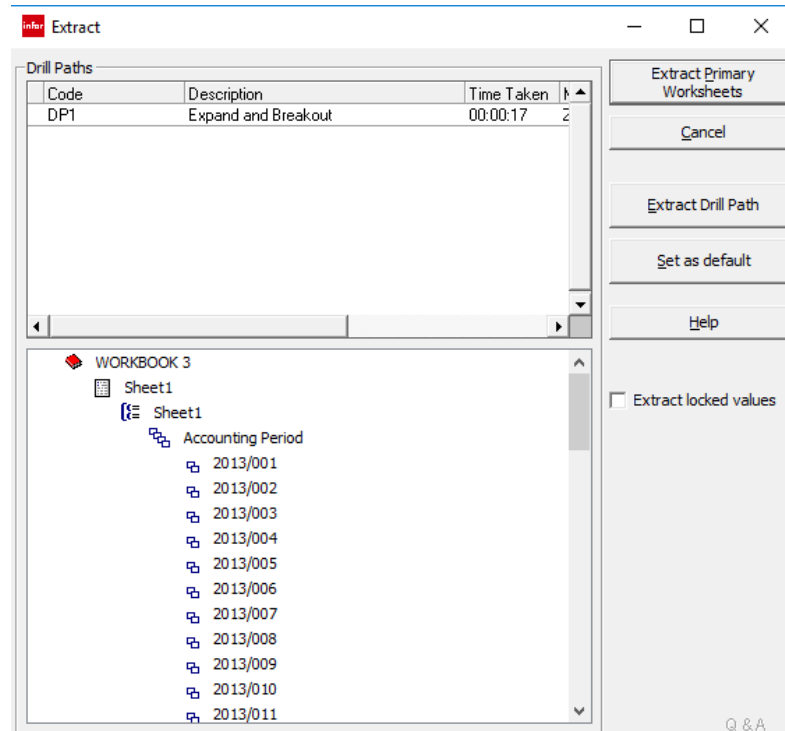| Code	Description	Filter From		Filter To	
LastYear	Last Year Range	2014001	...	2014012	...
CurrentYear	Enter Current Year Range	2015001	...	2015012	...

The prompts now reflect the Accounting Periods changes we entered.

However, for the sake of our example, let us leave the Year Ranges as 2013 and 2014.

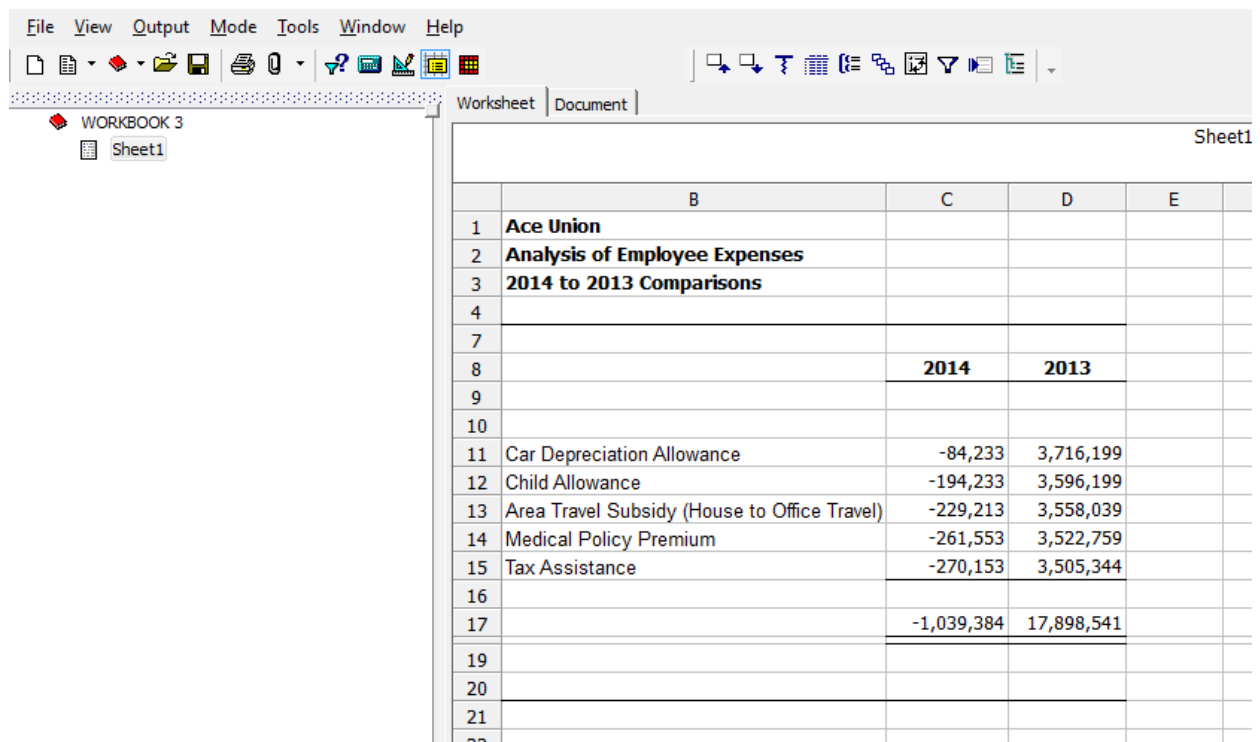| Code	Description	Filter From		Filter To	
LastYear	Last Year Range	2013001	...	2013012	...
CurrentYear	Enter Current Year Range	2014001	...	2014012	...

47. Notice that the familiar Extract icon is back on the toolbar. Click Extract

48. Click the Extract Primary Worksheets button

Here we have our nice little report for the years 2013 and 2014!

Please do not try to make sense of the figures in this report. Remember that we are using a sparsely populated demonstration business unit. The figures are not likely to be reflective of any real life equivalent.