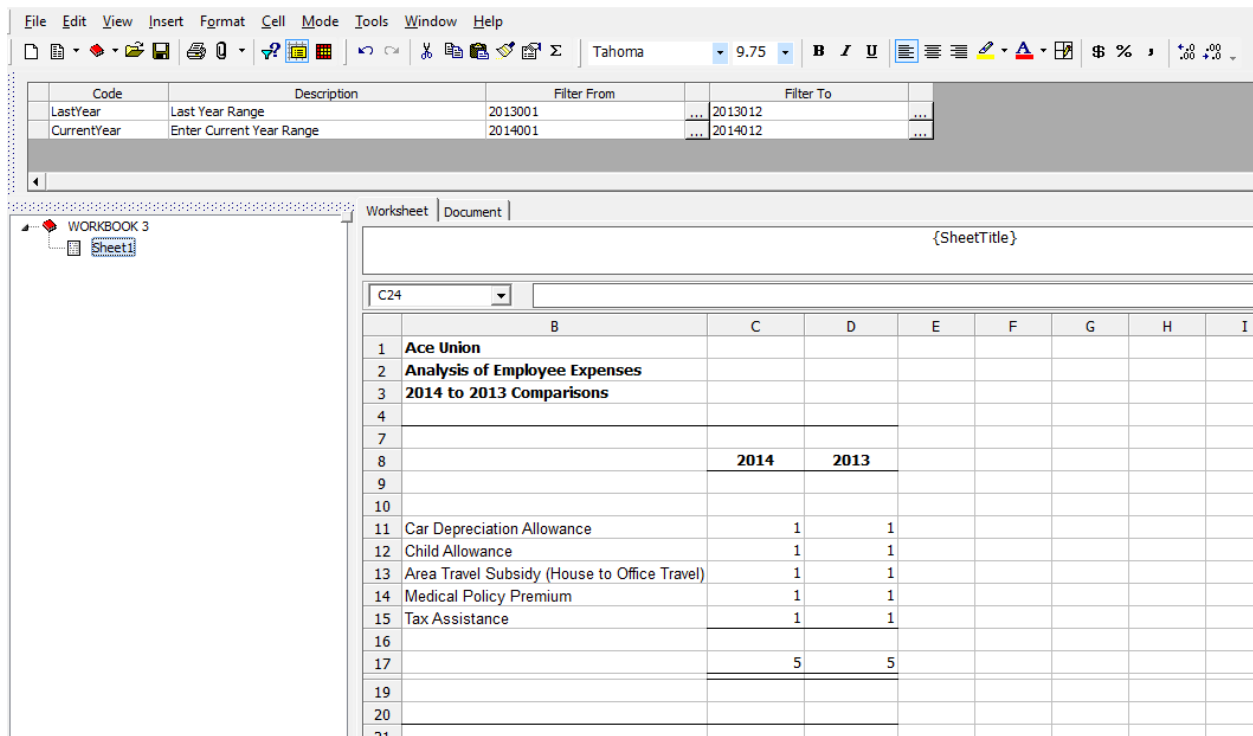


Q&A Executive Training

Reference Prompts

A Reference Prompt is very powerful and useful. It lets you select the value you need from a list of all possible values. That means you don't have to know the exact value to run the report; Reference Prompts also prevent typos or other mistakes from invalidating your query.

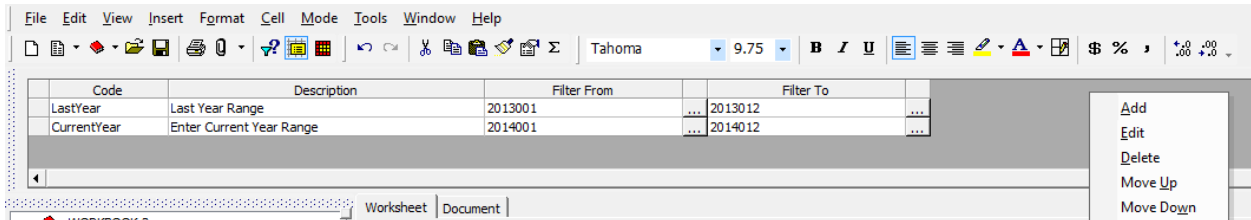
We are going to use the Analysis of Employee Expenses report we have been working with as we study Reference Prompts. If you still have the report open from the last lesson, Save it at this point. For some reason, prompts are very sensitive about whether or not the work has been saved. If you are working on prompts and the prompt freezes up, Save your work and the worksheet should be fine.



Reference Type prompts are basically the same as the prompts we worked with in the last lesson. They link whatever the user fills in as the values of the prompts back to the values in the queries.

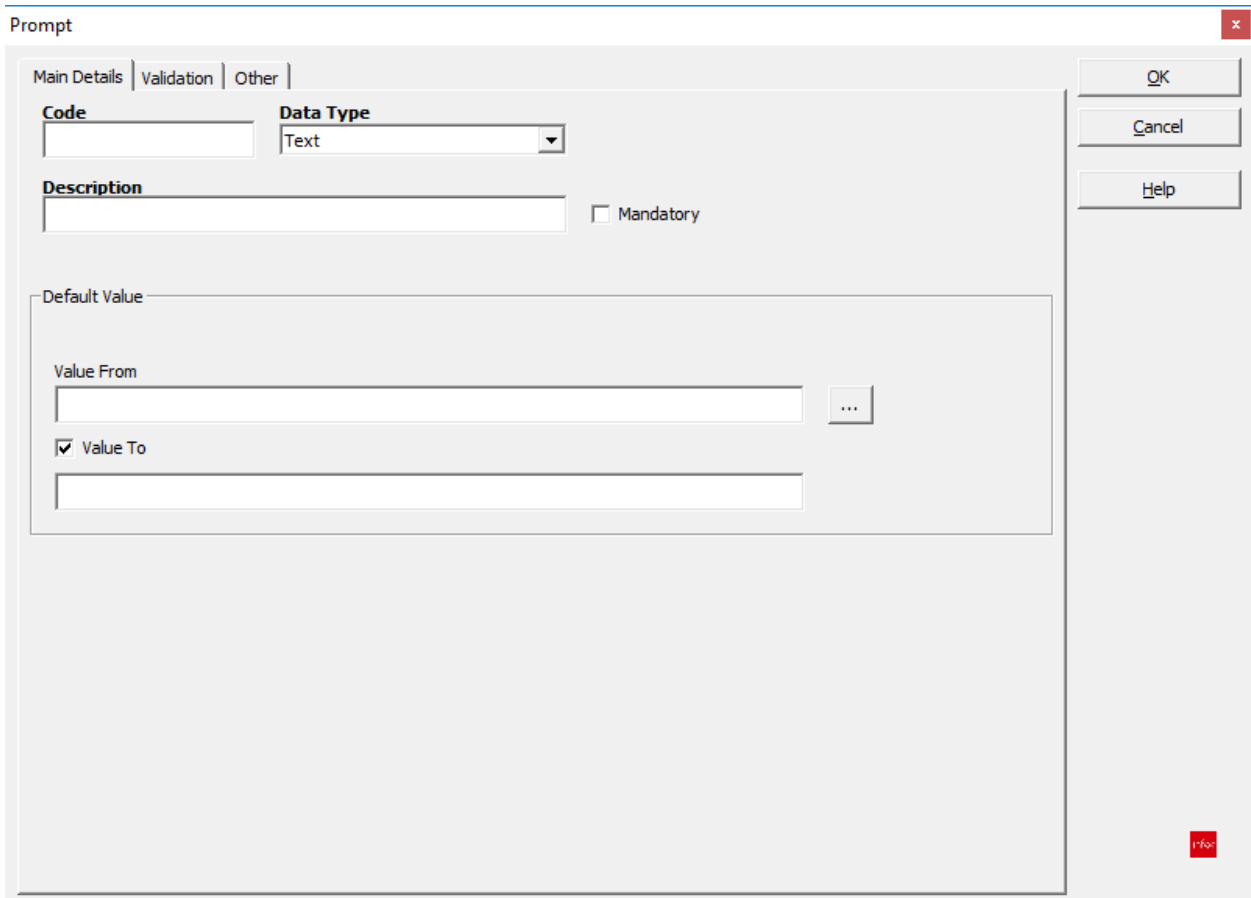
Add Prompt

When you add the first prompt to a worksheet, you must use the Edit > Prompts > Add process; however, once at least one prompt exists in a worksheet, you can add new prompts by right-clicking in the Prompt Pane and selecting Add.

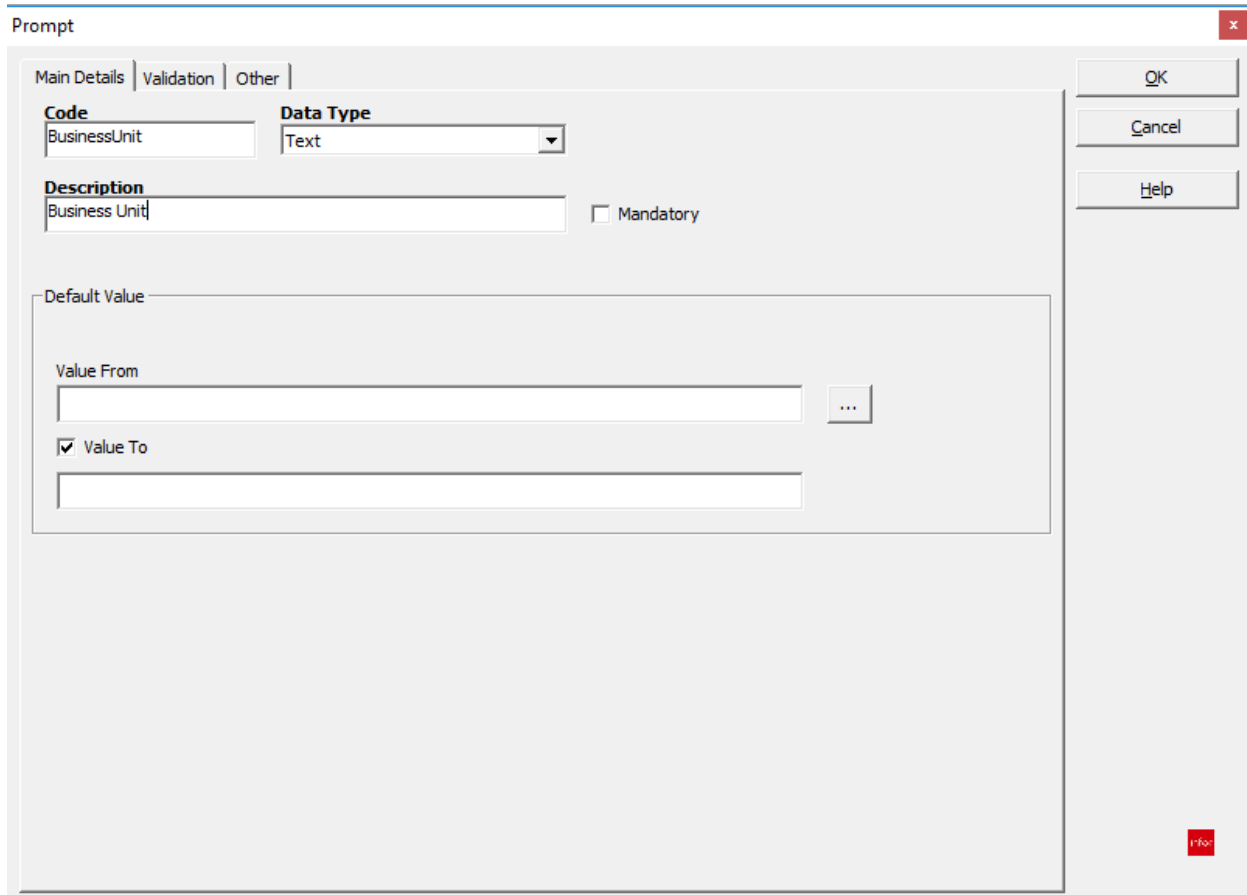


We are going to add a Business Unit Reference Prompt to our Prompt Pane. A Business Unit Prompt will let us use our report on any Business Unit.

1. Right-click in the Prompt Pane
2. Select Add



3. Enter a Code of 'BusinessUnit'
4. Enter a Description of 'Business Unit'



Prompt

Main Details | Validation | Other

Code
BusinessUnit

Data Type
Text

Description
Business Unit

Mandatory

Default Value

Value From

Value To

OK

Cancel

Help

SunPlus

5. Select the Reference Data Type

Prompt

Main Details | Validation | Other

Code
BusinessUnit

Data Type
Reference

Description
Business Unit Mandatory

Mode: Auto

Filter

Filter From:

Filter To:

Description	Filter From	Filter To	Value From	Value To
Product	SunSystems 6		SunSystems 6	
Business Unit	ATA		ATA	
Table				

Prompt Item

Value From:

Value To:

OK
Cancel
Help

6. Click on the Table row in the Filter Pane across the middle of the dialog

Prompt

Main Details | Validation | Other

Code
BusinessUnit

Data Type
Reference

Description
Business Unit Mandatory

Mode: Auto

Filter
Filter From

Description	Filter From	Filter To	Value From	Value To
Product	SunSystems 6		SunSystems 6	
Business Unit	ATA		ATA	
Table				

Prompt Item

Value From

Value To

OK
Cancel
Help

7. Click the Filter From field's Assist button to access the available values

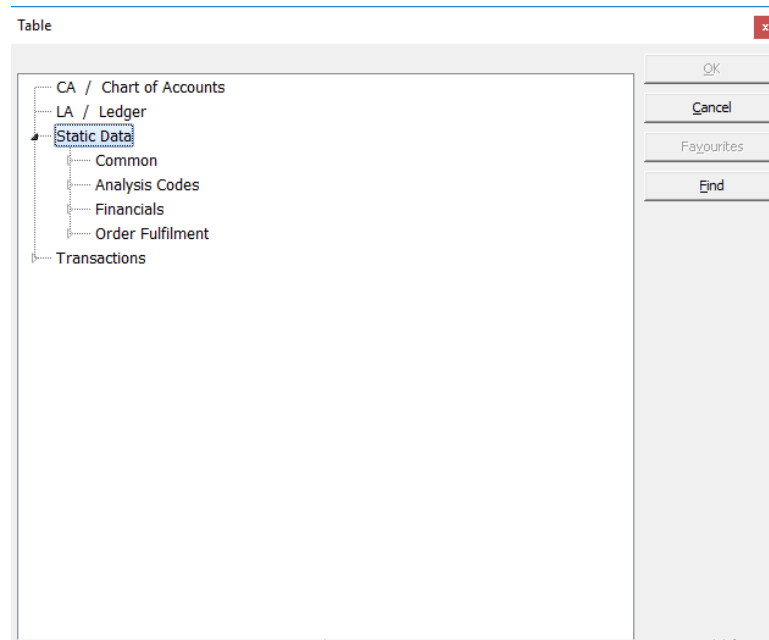
Table

CA / Chart of Accounts
LA / Ledger
Static Data
Transactions

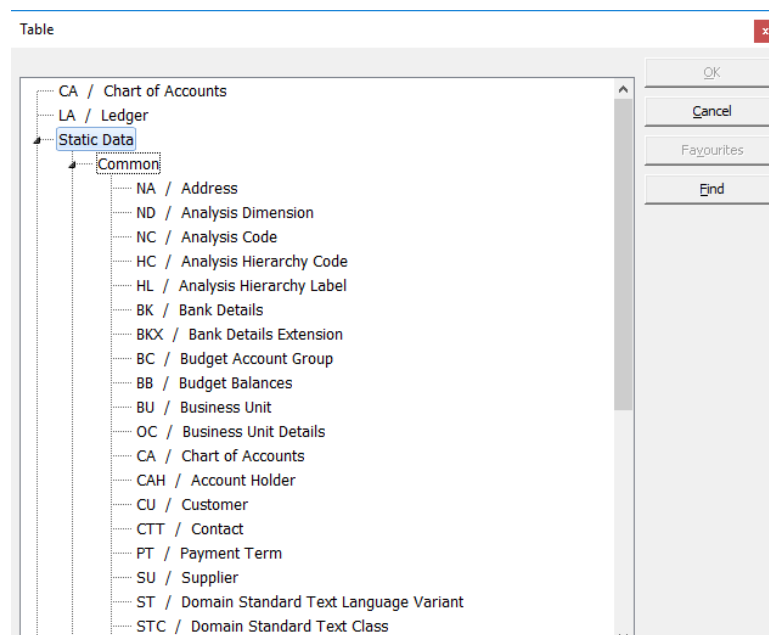
OK
Cancel
Favourites
End

So far all of our queries have been built around the Ledger Table. This time, we want to pull in the Business Unit. This is an item of static data, so we don't want the Ledger Table this time.

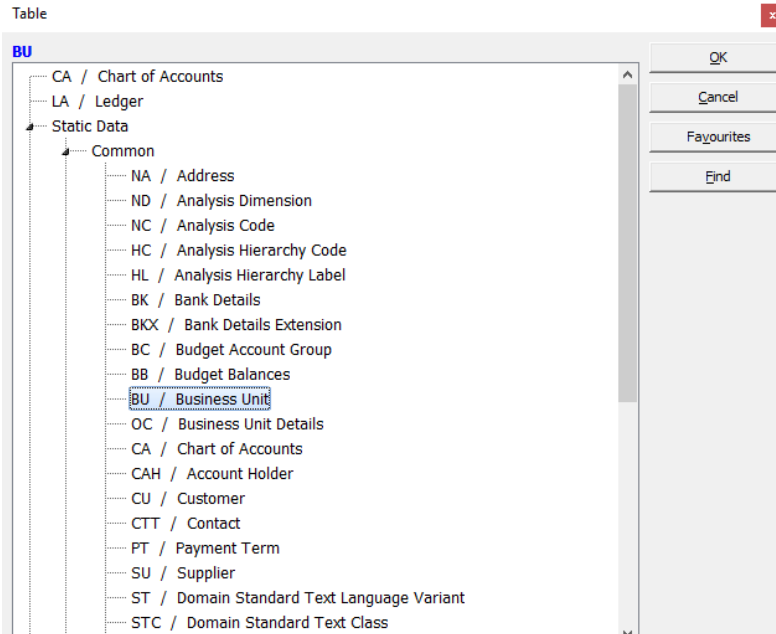
8. Click on Static Data
9. Expand the Static Data table



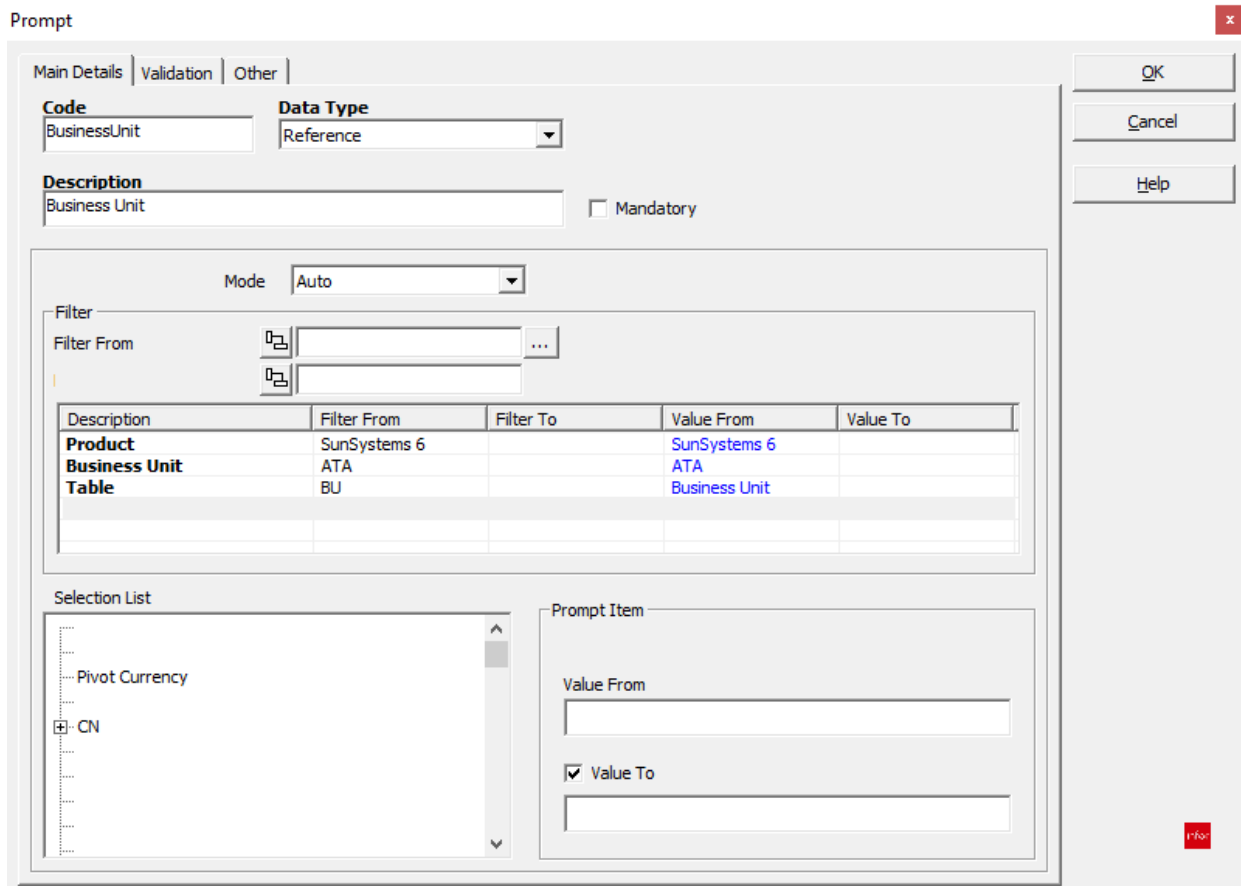
10. Expand Common



11. Select Business Unit



12. Click OK



13. With the focus still on the BU Table, click in the Filter From field

Prompt

Main Details | Validation | Other

Code
BusinessUnit

Data Type
Reference

Description
Business Unit Mandatory

Mode: Auto

Filter
Filter From: BU Business Unit

Description	Filter From	Filter To	Value From	Value To
Product	SunSystems 6		SunSystems 6	
Business Unit	ATA		ATA	
Table	BU		Business Unit	

Selection List

- Pivot Currency
- CN

Prompt Item

Value From

Value To

Value To

OK
Cancel
Help

14. Click on the row below the Table row

15. Click the Assist button at the right side of the Filter From field

Prompt

Main Details | Validation | Other

Code
BusinessUnit

Data Type
Reference

Description
Business Unit Mandatory

Mode: Auto

Filter

Filter From:

Description	Filter From	Filter To	Value From	Value To
Product	SunSystems 6		SunSystems 6	
Business Unit	ATA		ATA	
Table	BU		Business Unit	
Business Unit Code				

Selection List

- Business Unit Code**
- Business Unit Description
- Pivot Currency
- Base Currency
- [-] CN Base Currency
 - Base Currency Name
 - Base Currency Amt Dec Places
 - Base Currency Amount Balancing
 - Debit/Net Balancing Account
 - Credit Balancing Account

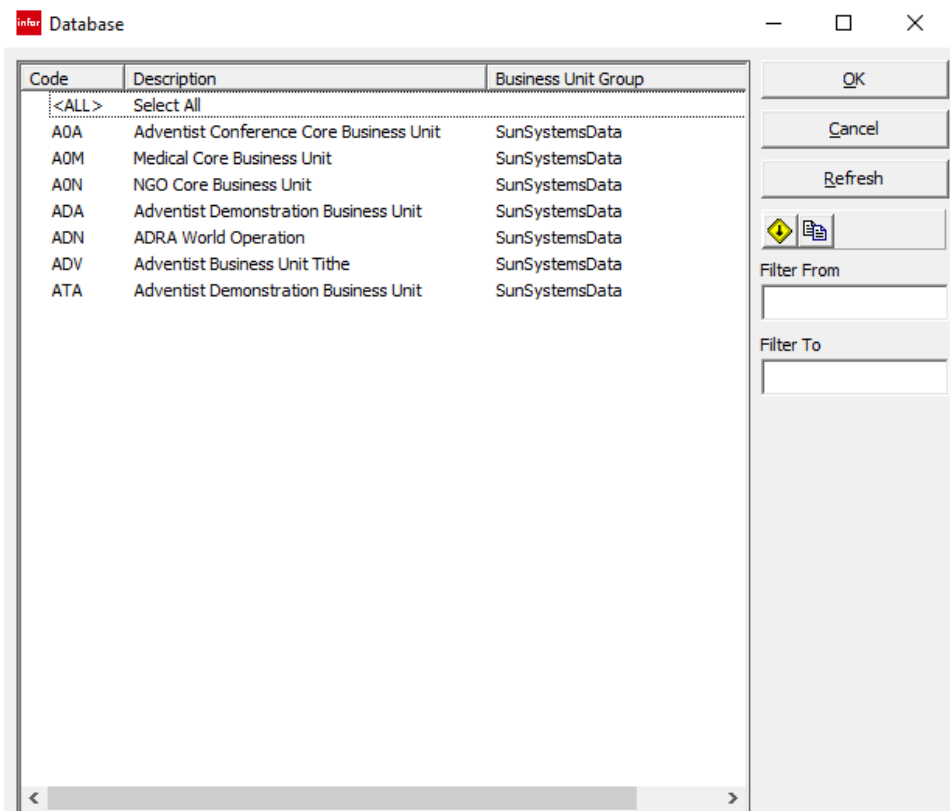
Prompt Item

Value From:

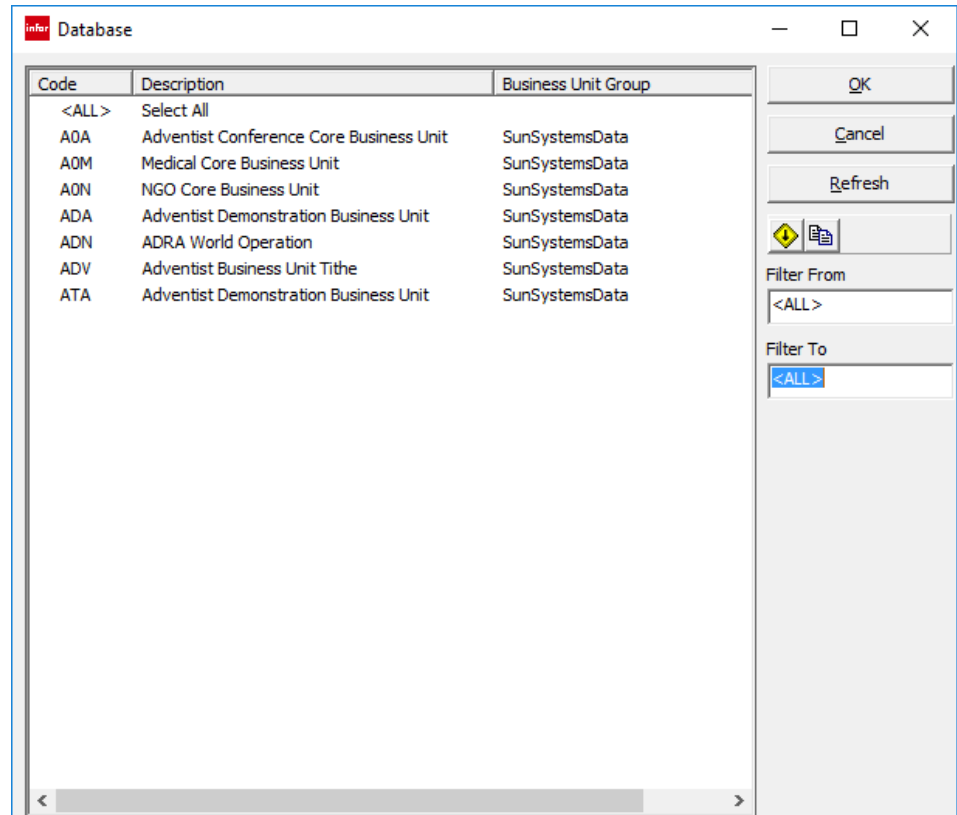
Value To:

OK
Cancel
Help

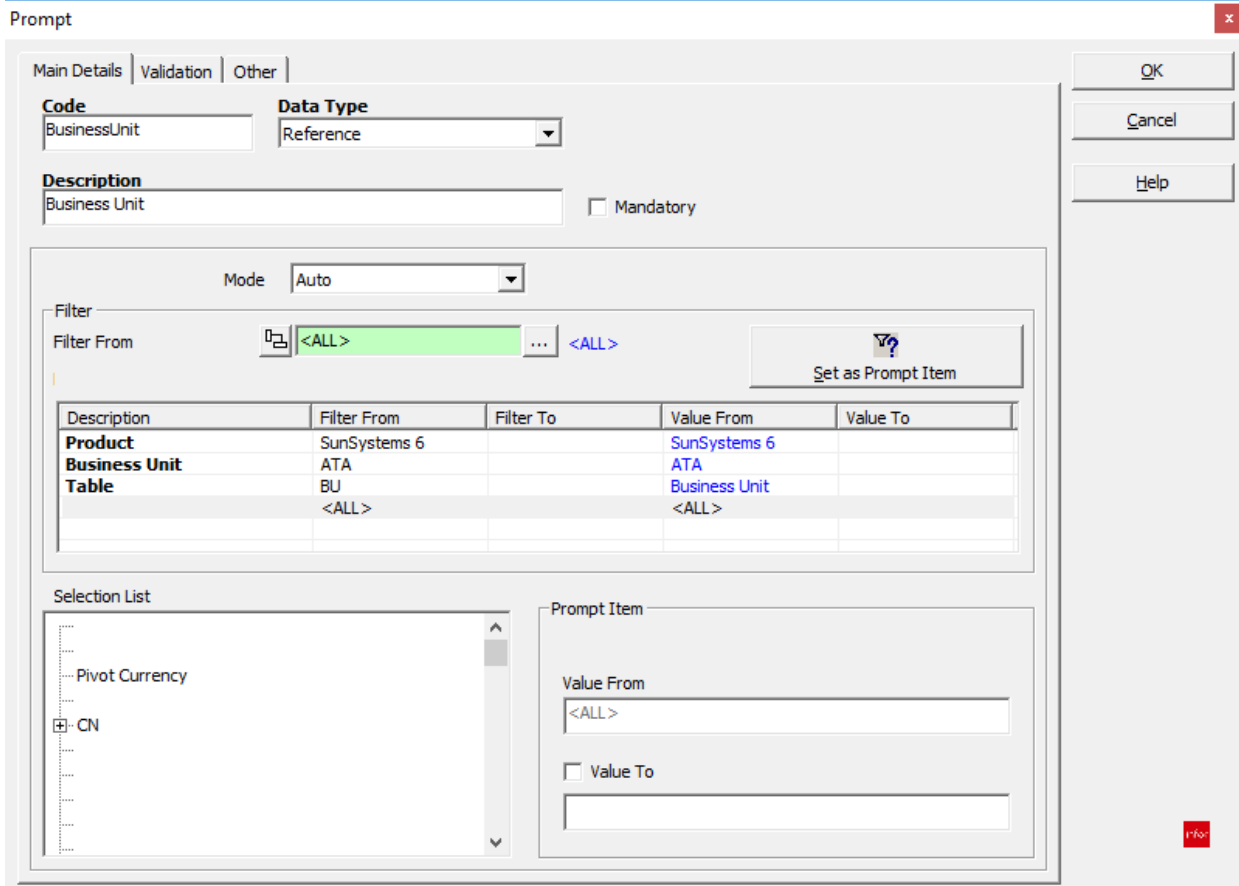
16. Click on the Assist button at the right side of the Filter From field



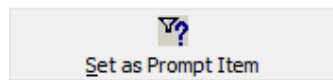
17. Click on <ALL>



18. Click OK



19. Click the Set as Prompt Item



Notice that the Value From field in the Prompt Item frame at the lower right side of the dialog is now populated.

Business Unit is not a range, so we need to uncheck the Value To checkbox.



20. Click OK

Prompt

Main Details | Validation | Other

Code
BusinessUnit

Data Type
Reference

Description
Business Unit Mandatory

Mode: Auto

Filter From: <ALL>

Description	Filter From	Filter To	Value From	Value To
Product	SunSystems 6		SunSystems 6	
Business Unit	ATA		ATA	
Table	BU		Business Unit	
Business Unit Code	<ALL>		<ALL>	

Selection List

- Business Unit Code
- Business Unit Description
- Pivot Currency
- Base Currency
- [-] CN Base Currency
 - Base Currency Name
 - Base Currency Amt Dec Places
 - Base Currency Amount Balancing
 - Debit/Net Balancing Account
 - Credit Balancing Account

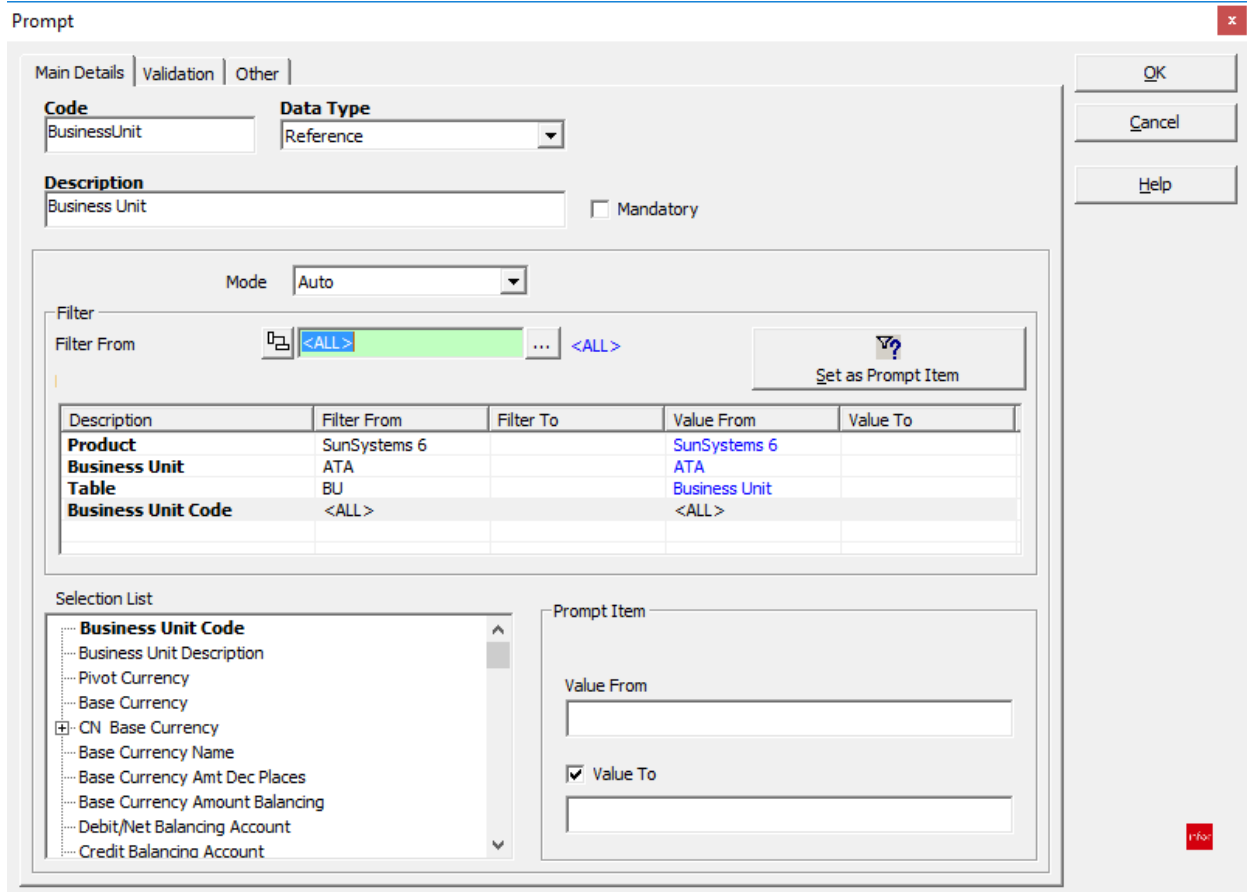
Prompt Item

Value From

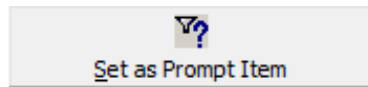
Value To

Buttons: OK, Cancel, Help

21. Click in the Business Unit Code row



22. Click Set as Prompt button



Notice that when we clicked Set as Prompt Item, the <ALL> value appeared in the Value From field in the lower right corner of the dialog.

23. Uncheck the Value To check box

Prompt x

Main Details | Validation | Other

Code
BusinessUnit

Data Type
Reference

Description
Business Unit Mandatory

Mode: Auto

Filter
Filter From: ...

Description	Filter From	Filter To	Value From	Value To
Product	SunSystems 6		SunSystems 6	
Business Unit	ATA		ATA	
Table	BU		Business Unit	
Business Unit Code	<ALL>		<ALL>	

Selection List

- ... Business Unit Code
- ... Business Unit Description
- ... Pivot Currency
- ... Base Currency
- ... CN Base Currency
- ... Base Currency Name
- ... Base Currency Amt Dec Places
- ... Base Currency Amount Balancing
- ... Debit/Net Balancing Account
- ... Credit Balancing Account

Prompt Item

Business Unit Code

Value From

Value To

OK
Cancel
Help

24. Click OK

The screenshot shows the SunPlus software interface. At the top, there is a menu bar with 'File', 'Edit', 'View', 'Insert', 'Format', 'Cell', 'Mode', 'Tools', 'Window', and 'Help'. Below the menu bar is a toolbar with various icons for file operations and editing. The main window is divided into two panes. The left pane shows a tree view with 'WORKBOOK 3' and 'Sheet1'. The right pane shows a worksheet grid. The grid has columns labeled B through I and rows numbered 1 through 21. The data in the grid is as follows:

	B	C	D	E	F	G	H	I
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								

Notice there is now a third prompt in our Prompt Pane.

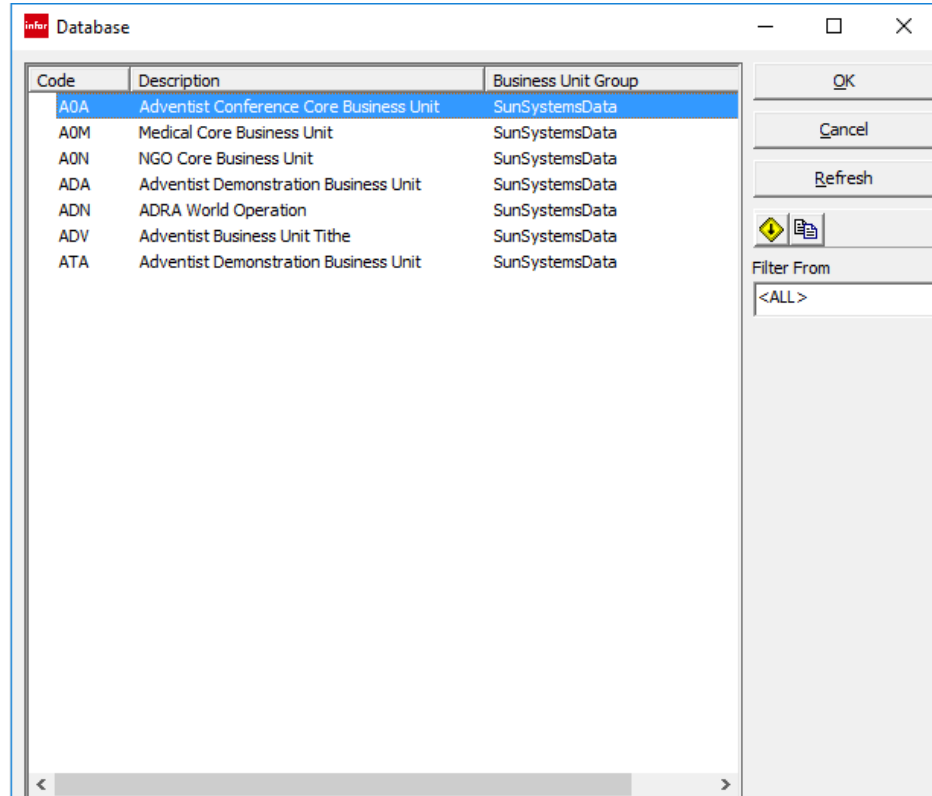
25. Click the Query Prompt icon

The screenshot shows the SunPlus software interface with the filter table. The table has columns for 'Code', 'Description', 'Filter From', and 'Filter To'. The data in the table is as follows:

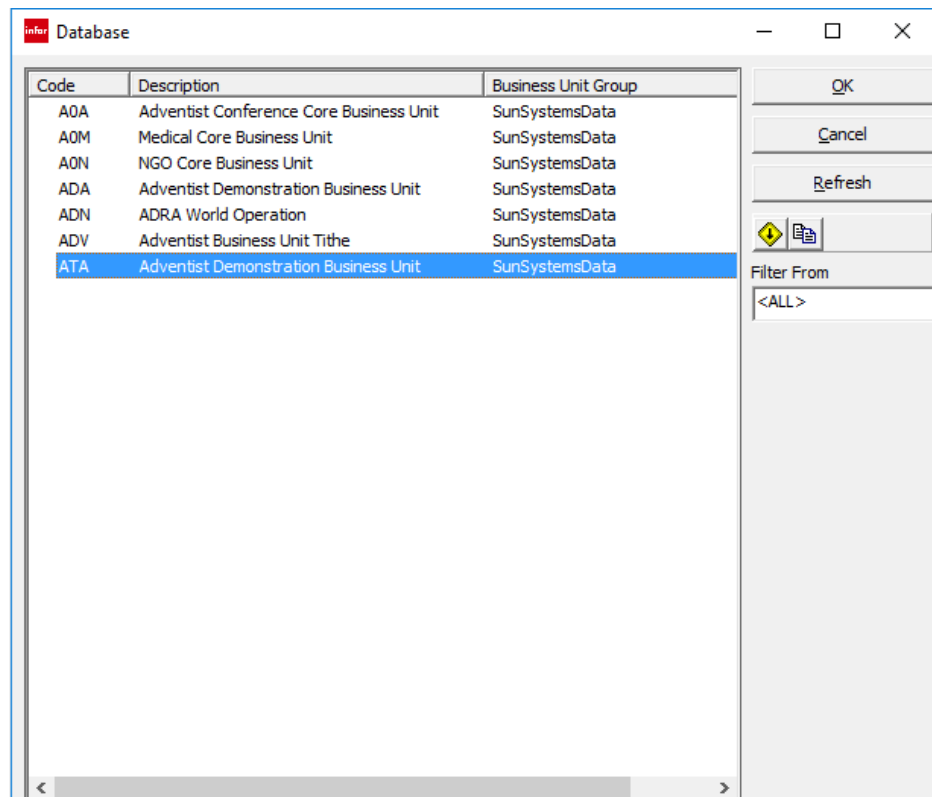
Code	Description	Filter From	Filter To
LastYear	Last Year Range	2013001	2013012
CurrentYear	Enter Current Year Range	2014001	2014012
BusinessUnit	Business Unit	<ALL>	

The 'Assist' button (a blue question mark icon) is located to the right of the 'Business Unit' filter field.

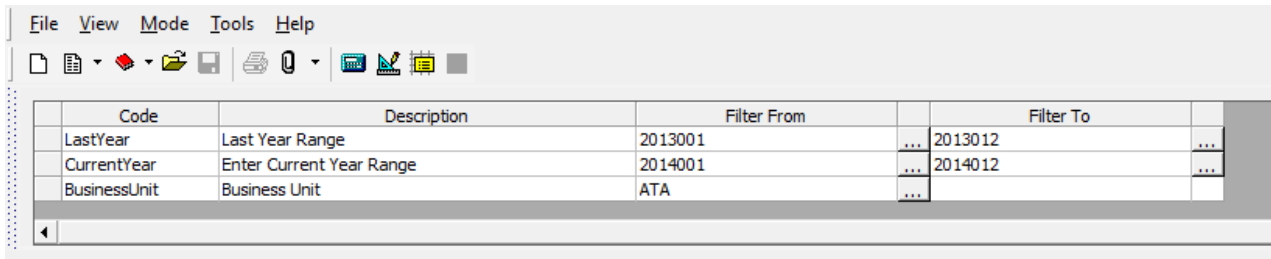
26. Click the Assist button at the right of the Business Unit Filter From field



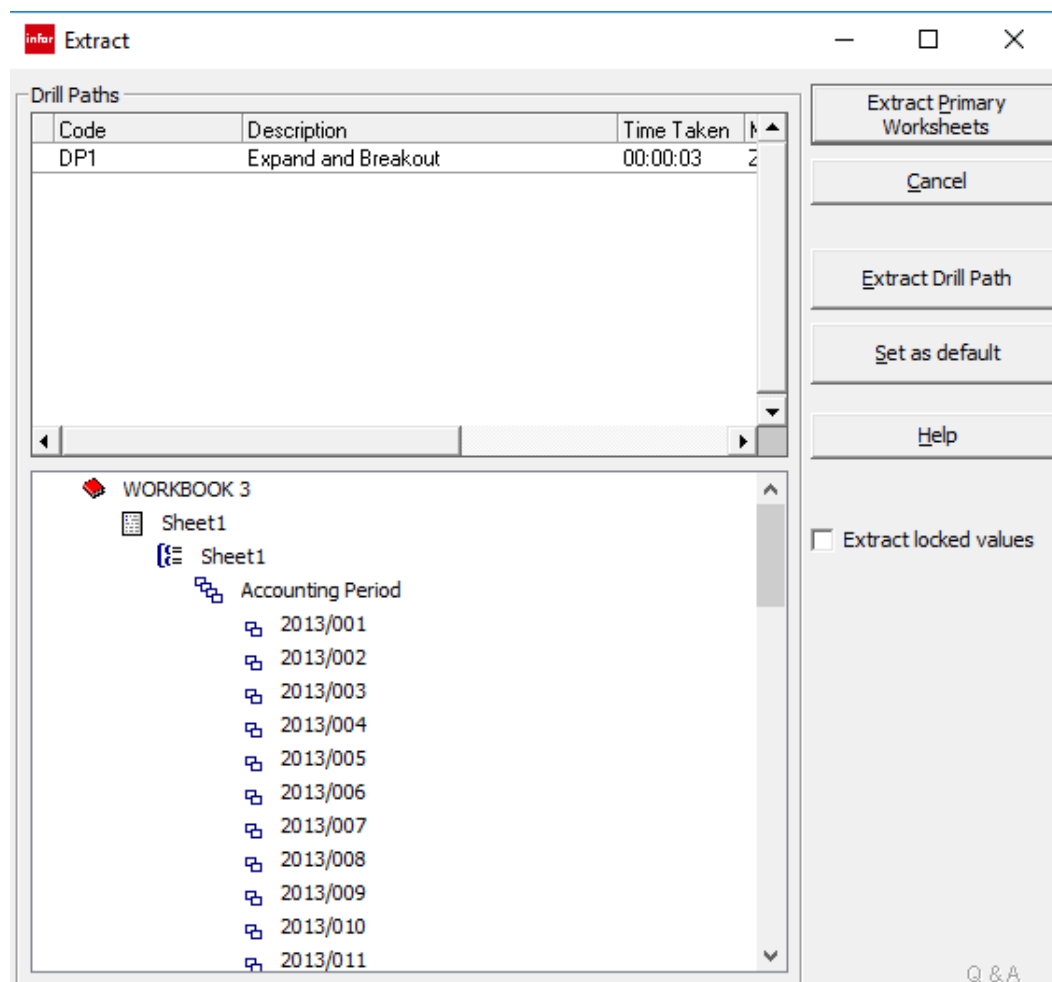
27. Select ATA



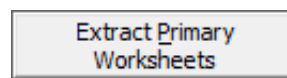
28. Click OK

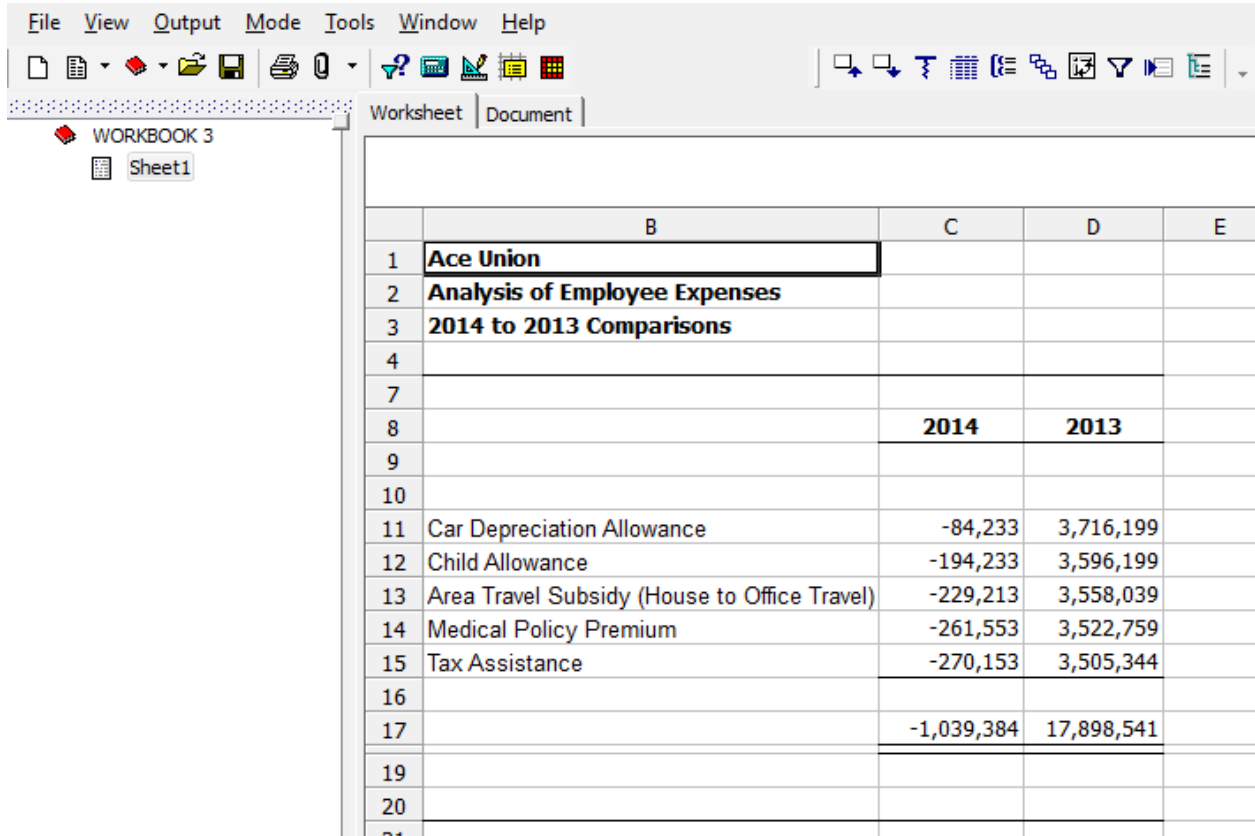


29. Click the Extract icon



30. Click the Extract Primary Worksheets button





The screenshot shows a spreadsheet application window with the following menu: File, View, Output, Mode, Tools, Window, Help. The toolbar includes icons for file operations, editing, and data manipulation. The spreadsheet is titled 'Worksheet | Document' and contains the following data:

	B	C	D	E
1	Ace Union			
2	Analysis of Employee Expenses			
3	2014 to 2013 Comparisons			
4				
7				
8		2014	2013	
9				
10				
11	Car Depreciation Allowance	-84,233	3,716,199	
12	Child Allowance	-194,233	3,596,199	
13	Area Travel Subsidy (House to Office Travel)	-229,213	3,558,039	
14	Medical Policy Premium	-261,553	3,522,759	
15	Tax Assistance	-270,153	3,505,344	
16				
17		-1,039,384	17,898,541	
19				
20				
21				

Here is our report.