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Q&A Executive Training Mass Query Revisions

Because many reports designed in Q&A consist of many queries, it is helpful to be able to make mass changes to queries. In this lesson we will study how to change a certain value in every query at once.

In the Reference Prompt lesson, we created a Business Unit prompt, but we did not link it to the query cells. In this lesson we will make that change.

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1. Open the Analysis of Employee Expense report

2. Highlight cells C11 through D15

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		Medical Policy Pr	emium	1	1						
		Tax Assistance		1	1						
	16			-							
				5	5						
	17										

In previous lessons, we have learned how to open query definitions and change the queries one at a time. In this lesson, we will learn how to make a mass change.

3. Right-click

Code		Description		Filter F	rom	F	ilter To				_	
.astYear	Last Year Range			2013001		2013012						
CurrentYear	Enter Current Y	ear Range		2014001		2014012						
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4. Select Define Criteria

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^{infor} Define Criteria C	11:D15			×
	Description	Filter From	Filter To	
Business Unit	Debenpuon	ATA	The Po	
LA\Ledger		A		
LA\Account Code		=\$A11		
LA Accounting Period		=(CurrentYear)	=((CurrentYear))	
•				
Filter				
Product	SunSystems 6		infor	
Table	LA Ledger			
Description	Business Unit			
Filter From	四 ATA			
		Help	<u>o</u> ĸ	<u>C</u> ancel

The Define Criteria dialog is quite a bit different from the Query dialog we would have seen if we clicked on each cell individually.

Look at the top pane of the Define Criteria dialog. The top two values listed in the top pane are shown with white backgrounds and the next two are pink.

White backgrounds show the data items whose values in the queries are harmonious. In other words, for each of the cells we have highlighted, the Business Unit and Ledger data items have the same values. Each of these queries will pull in the same data – the same Business Unit and from the same Ledger.

Pink backgrounds show that the values for the data items are different for each cell, so the data pulled in will be different. If you change the values with pink backgrounds to return the same values, damage could be done to the report. Those values are not harmonious, so changing them to all the same values would be harmful. They can be changed, but first you need to unlock them. You should never unlock a value unless you are an expert in Q&A report design.

But we can change any values with white backgrounds en masse.

Let's select the first value in the top pane, Business Unit.

5. Click on Business Unit

infor Define Criteria C1	11:D15			×
	Description	Filter From	Filter To	•
Business Unit		ATA		
LA\Ledger		A		
LA\Account Code		=\$A11		
LA\Accounting Period		=(CurrentYear)	=((CurrentYear))	
•				•
Filter Product	Surfunktion (-	
	SunSystems 6		infor	
Table	LA Ledger			
Description	Business Unit			
Filter From		ATA		
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6. Delete the value in the Filter From field at the bottom of the dialog

inter Define Criteria	C11:D15				×
	Description	Filter From		Filter To	
Business Unit					
LA Ledger		A			
LA\Account Code		=\$A11			
LA\Accounting Perio	d	=(CurrentYear)	=((C	urrentYear))	
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Filter					
Product	SunSystems 6		info	×	
Table	LA Ledger				
Description	Business Unit				
Locked					
Filter From	Ъ				
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7. Click on the Field References icon at the left side of the Filter From field



Field References		-		>
Prompt			<u>o</u> k	
Last Year Range	=(LastYear)			
Enter Current Year Range	=(CurrentYear)		<u>C</u> ano	el
Business Unit	=(BusinessUnit)			
Defined Names			<u>H</u> elp)
🕬 🔶 Workbook Properties				
Sheet Properties				
🕬 😥 User Details				
Date and Time Details				
📴 🗗 Breakout				
Dictionary				
Period Selection				
Date Selection				

The Field References dialog gives us all of our prompts and breakouts. We've been here before, when we did our breakout codes, so it should be somewhat familiar.

Let's remind ourselves what we are working on: changing the Business Unit Code for the entire worksheet.

8. Click Business Unit under the Prompt section

····? _b Prompt		<u>о</u> к
East Year Range	=(LastYear)	
Enter Current Year Range	=(CurrentYear)	<u>C</u> ancel
Business Unit	=(BusinessUnit)	Hala
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미그, Link Codes		
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Sheet Properties		
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9. Click OK

	Description	Filter From	Filter To	
Business Unit		=(BusinessUnit)		
A\Ledger		A		
A\Account Code		=\$A11		
A\Accounting Peri	bd	=(CurrentYear)	=((CurrentYear))	
				•
- Filter				
Product	SunSystems 6		where	
			1960-	
Product Table	LA Ledger		Ploc	
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Product Table Description	LA Ledger			
Product Table	LA Ledger Business Unit			
Product Table Description	LA Ledger Business Unit	ATA		
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Product Table Description	LA Ledger Business Unit	 ATA		
Product Table Description	LA Ledger Business Unit	ATA		
Product Table Description	LA Ledger Business Unit	ATA Help	OK Cance	



10. Click OK

The system will now return the value entered at run time into the Business Unit prompt field for all of the queries.

That is how you make a mass change to all of the queries in a worksheet.

In the next lesson I will show you how to pull up the name of the organization as a variable that changes every time you move the report to a different organization.