PeopleSoft (version 9.1): Introduction to the Query Tool

Introduction

This training material introduces you to some of the basic functions of the PeopleSoft (PS) Query tool as they are used at the University of Delaware (UD). The Query tool is an end-user reporting tool, which allows you to extract precise information using visual representations of your PS database—without writing Structured Query Language (SQL) statements. The Query tool can be used to do the following:

- display data in a grid (using a Preview tab),
- preview query data within Query Manager and Query Viewer, displaying the result set in a grid for review, and
- download query results to an Excel spreadsheet.

Training Objectives

This training material was designed using a desktop computer running Windows XP (operating system) and using the Internet Explorer (version 6.0.2) browser. If you are using a different type of computer, operating system, or browser, some of the screen graphics may appear slightly different than those printed here. However, the function of the screen (page) should remain the same.

After you complete the exercises in this training material, you should be able to do the following:

- Navigate to the Query Manager Search page
- Understand the differences between a private and a public query
- Find and run existing queries
- Create and save new queries
    - identify the two primary tables for reporting
    - identify the criteria that should always be used in queries
- Preview query results
- Set criteria for data selection using
    - criteria components
    - boolean expressions
- Use prompts with a query
- Select data from multiple tables
- Use aggregate functions (defined by PS as “Having” criteria)
- Use the following expressions
    - numerical manipulation
    - substring
    - concatenate (combine fields into one)
    - decode (“if”)
- Run query results to Excel
- Use the Query Viewer

Conventions

The following conventions are used throughout the exercises in this material:

Item	**Convention**
Text the reader should type	**Courier, bold, 10 point font**
Keyboard key names	Bold, Uppercase text (e.g., the **ENTER** key)
Menu titles	**Bold, mixed-case letters**
Window titles	**Bold, mixed-case letters**

Table of Contents

Navigating to the Query Manager Search Page

Before you can use the Query tool, you must know how to navigate to the **Query Manager Search** page.

Exercise 1—How to Navigate to the Query Manager Search Page

Note: We recommend you use the Internet Explorer or Firefox. Currently, PS works best with these browsers.

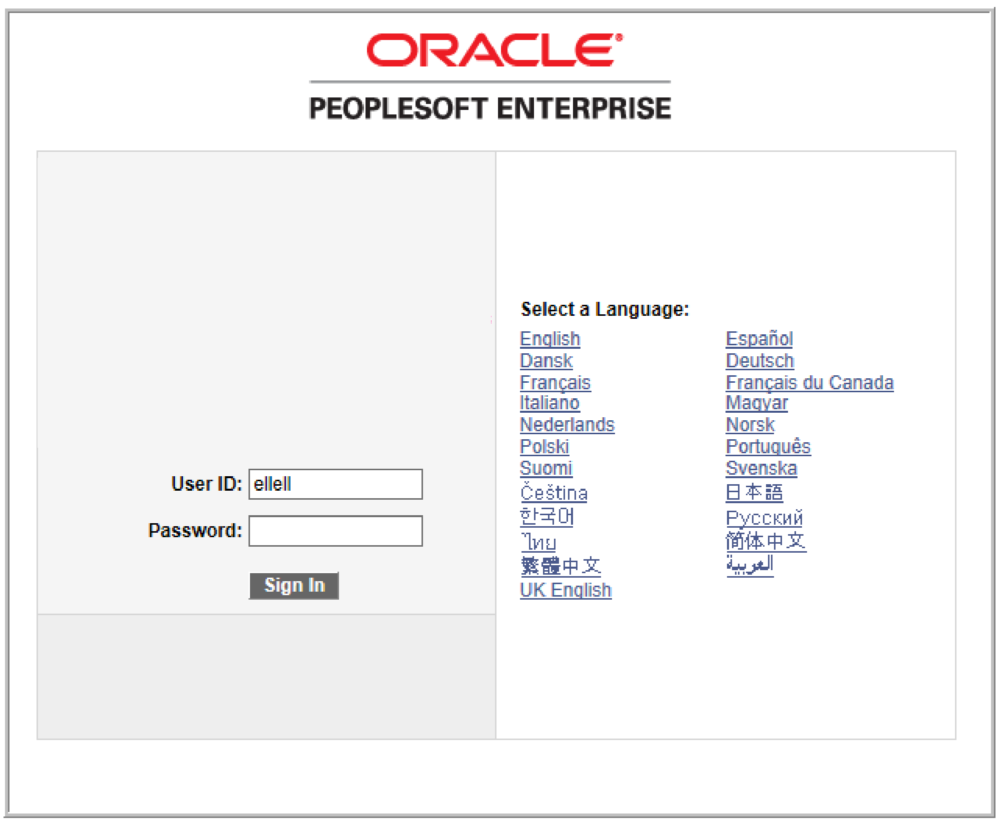
1. Open the Internet Explorer web browser.

2. To access the PS program, type the following URL in the browser's **Address** field:

   www.udel.edu/financials **or** **www/udel.edu/firpt**

3. Press **ENTER**.

   You should see this log-in page:

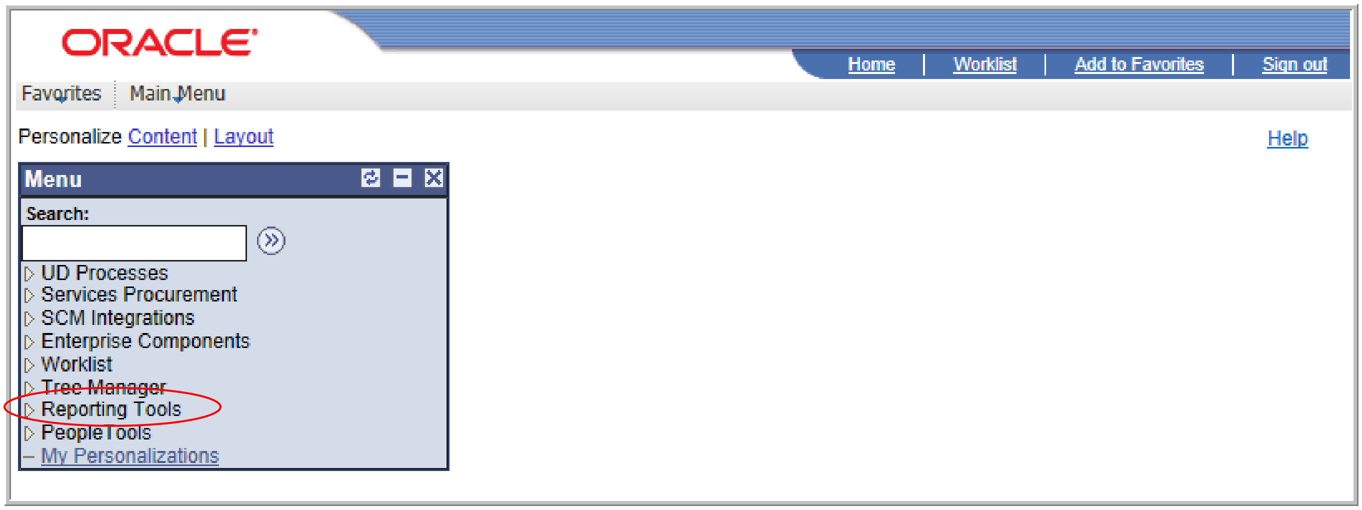


Note: Use your User ID and Password that you normally use to logon to the UD Financial System. It is usually your UDelNet ID and password.

4. Type your **User ID** in the appropriate field.

5. Type your **Password** in the appropriate field.

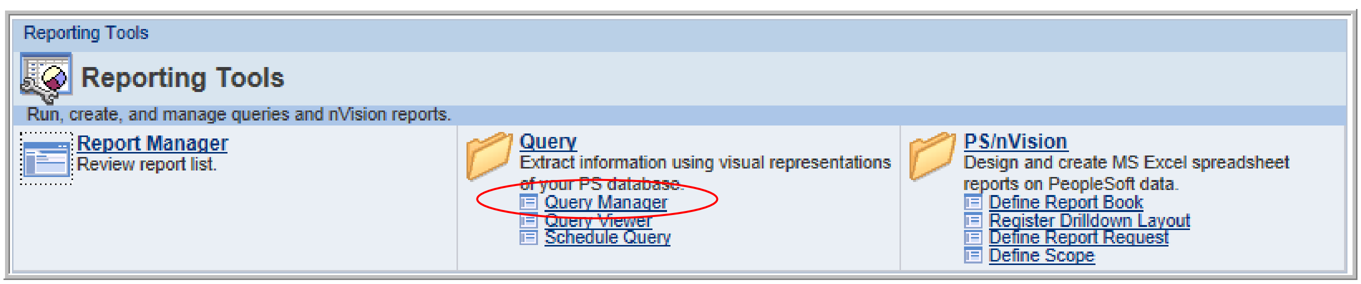
6. Click **Sign In**. You should see a page similar to the following:



On the left-hand side of the page you will see the **Menu** box, which lists the options you can access.

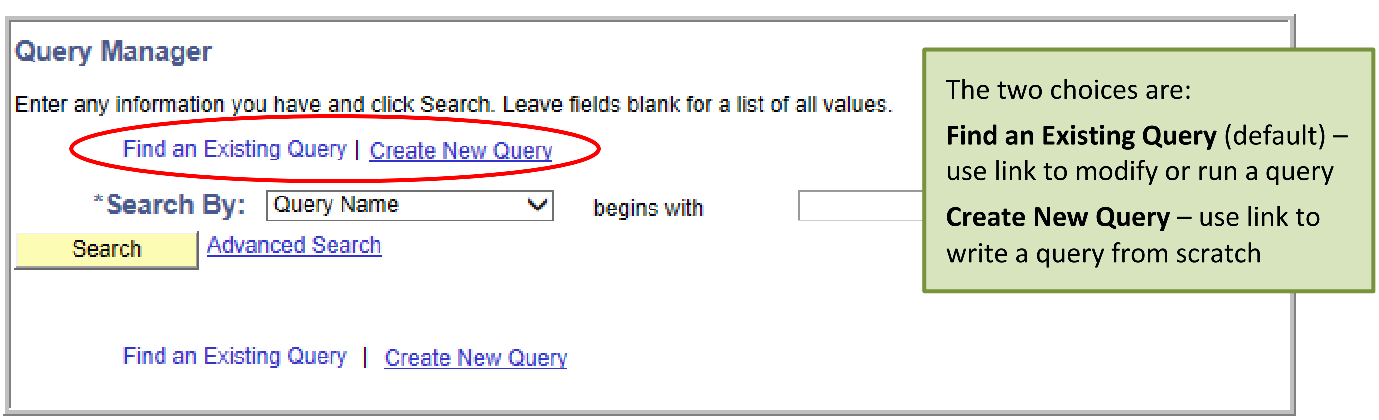
7. In the **Menu** box, click **Reporting Tools**.

8. Under **Query** listed under **Reporting Tools**. You should now see the following options in the options**:**
   Query Manager – you can run an existing query, create a new query, or modify an existing query
   Query Viewer – you can run an existing query
   Schedule Query – setup a query to run on a certain date/time



9. Click **Query Manager** from the options listed under **Query**.

You should see the **Query Manager Search** page, which should look similar to the following:

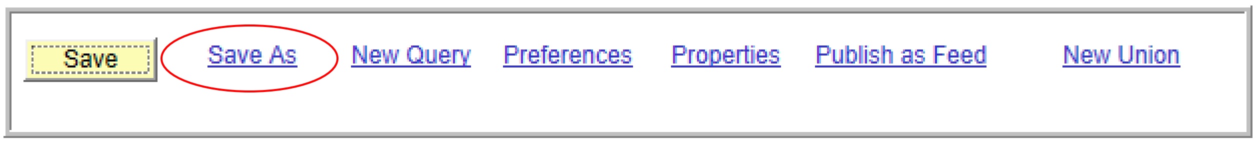


--End of Exercise--

Understanding Public and Private Queries

Before using the Query tool, you should understand the differences between a *public* query and a *private* query. The following items are a list of the most important differences:

- A *public* query may be used by anyone.
- Only the individual who created it may use a *private* query.
- If you use a public query created by someone else—and make any modifications to it—you must leave the public query in its original form and save the modified version as your query. Use the **Save As** link to do this.



- **Always** save your version of a public query with a unique name. We recommend using the creator's initials as the first three letters of the query name.
- Before creating a public query, review all public queries to confirm that your initials do not duplicate the first three letters of an existing query. If your initials are already being used, select a new, unique combination of letters to use for the first three characters of the query's name.
- If you create a public query, consider making a private copy with a unique name for yourself. Therefore, if someone mistakenly changes a public query you created, you still have a copy of the original query.
- When you search for queries from the **Query Manager Search** page, PS automatically lists all private queries you created—*only you* will see these. Public queries are listed after private queries.
- If you run a public query and do not receive results, you may not have authorization to some of the data used in that query.

Note: The following table of definitions is based on information from the PS PeopleBooks online documentation. This information is included here for reference.

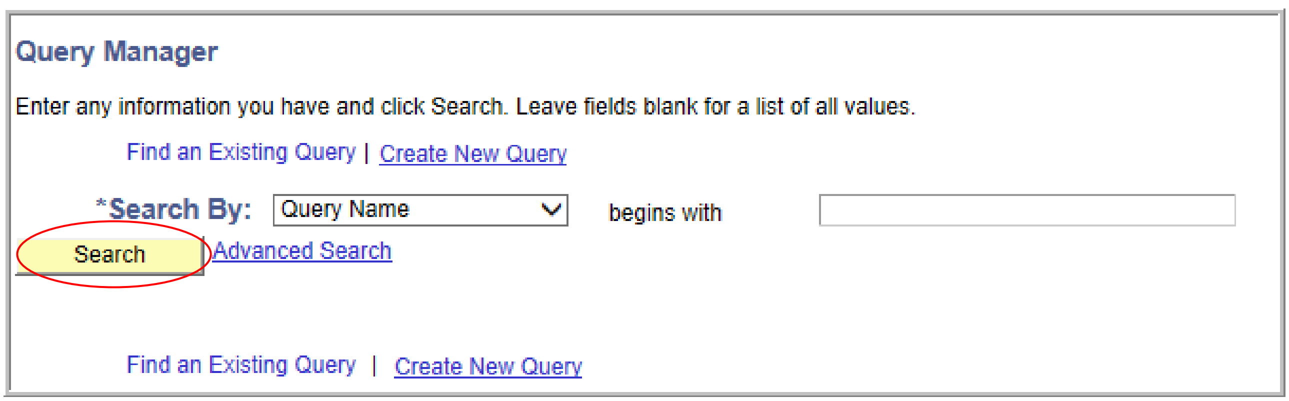
Terms and Buttons Used with the Query Tool

Term or Button	Action
Add Record	Click this link to access the Query page, where you can add fields to the query content or additional records.
Col (column)	Current column number for each field listed.
Query Name	*New Unsaved Query* appears in this read-only field until you change it on the Properties page. This field appears on all Create New Query pages.
Record.Fieldname	Record alias and name for each field listed.
Delete button	Click the Delete button to delete the associated record from the query. A confirmation message appears. Click the Yes button to proceed with the deletion. Click the No button to cancel the deletion.
Use as Criteria button	Click the Use as Criteria button to open the Criteria page, where you can add criteria for the selected field.

Finding All Existing Queries

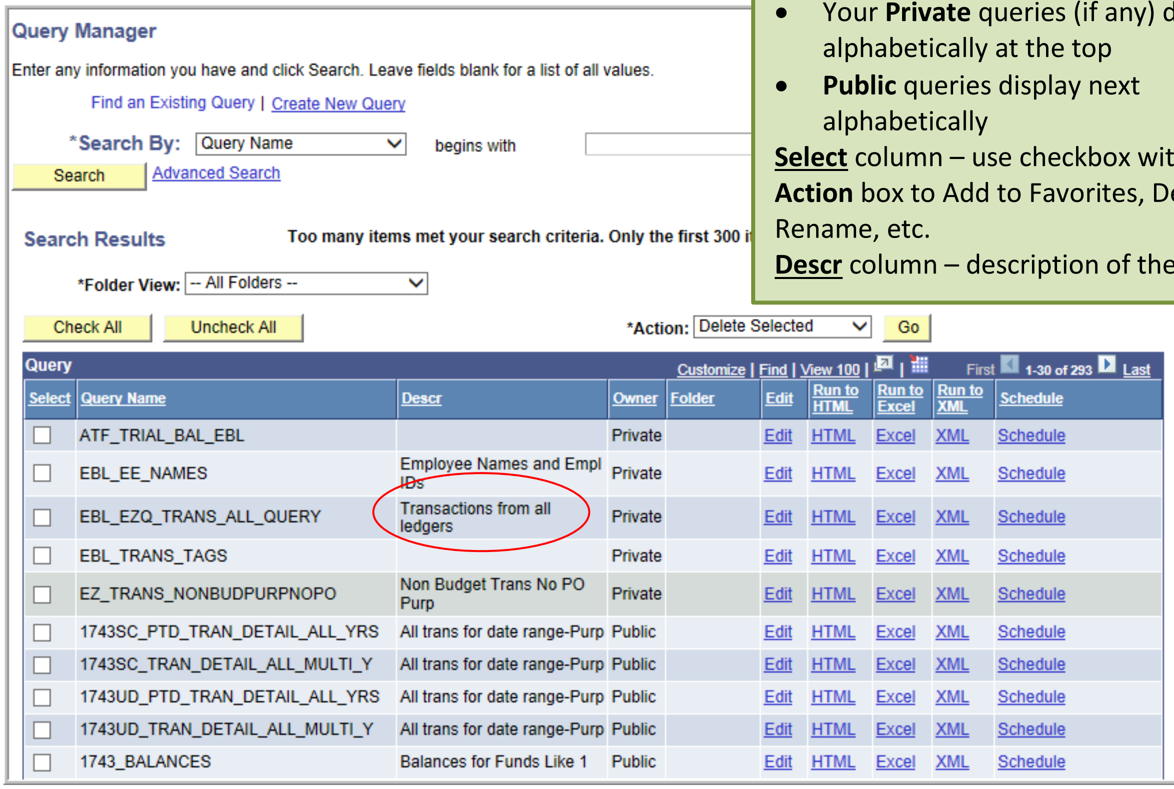
Exercise 2—How to Find All Existing Queries

1. If necessary, navigate to the **Query Manager Search** page (see instructions in exercise number 1). If you are already working within the **Query** tool, you can simply click **Query Manager** in the **Navigation Bar** at the top of the page. You should see **Find an Existing Query** page:



2. To see **ALL** available queries, leave the **begins with** field empty. Click **Search**.

This will return a list of queries in the **Search Results**:



Owner column:

- Your **Private** queries (if any) display alphabetically at the top
- **Public** queries display next alphabetically

Select column – use checkbox with the **Action** box to Add to Favorites, Delete. Rename, etc.
Descr column – description of the query

Click on any of the column headings to sort the list by the heading. (first click A to Z, second click Z to A).

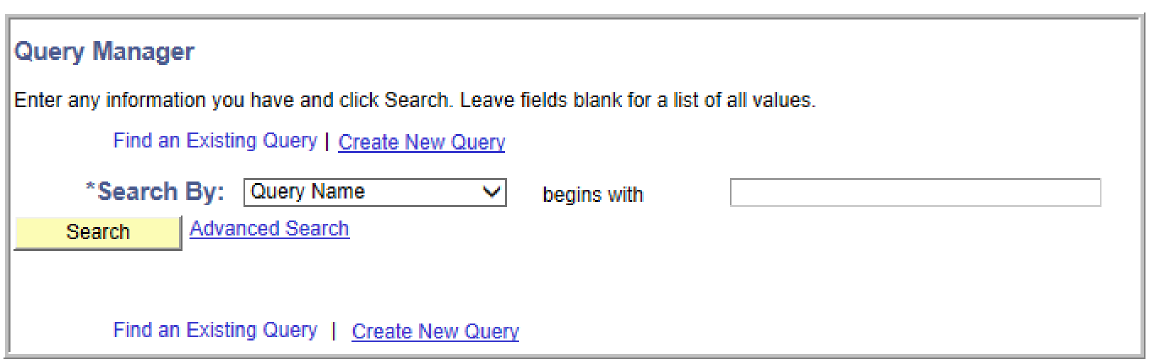
Note: If too many items are produced from a query search, only the first 300 results are displayed.

--End of Exercise—

Finding and Running an Existing Query

Exercise 3—How to Find and Run an Existing Query

1. If necessary, navigate to the **Query Manager Search** page (see instructions in exercise number 1). If you are already working within the **Query** tool, you can simply click **Query Manager** in the **Navigation Bar** at the top of the page. You should see the following:

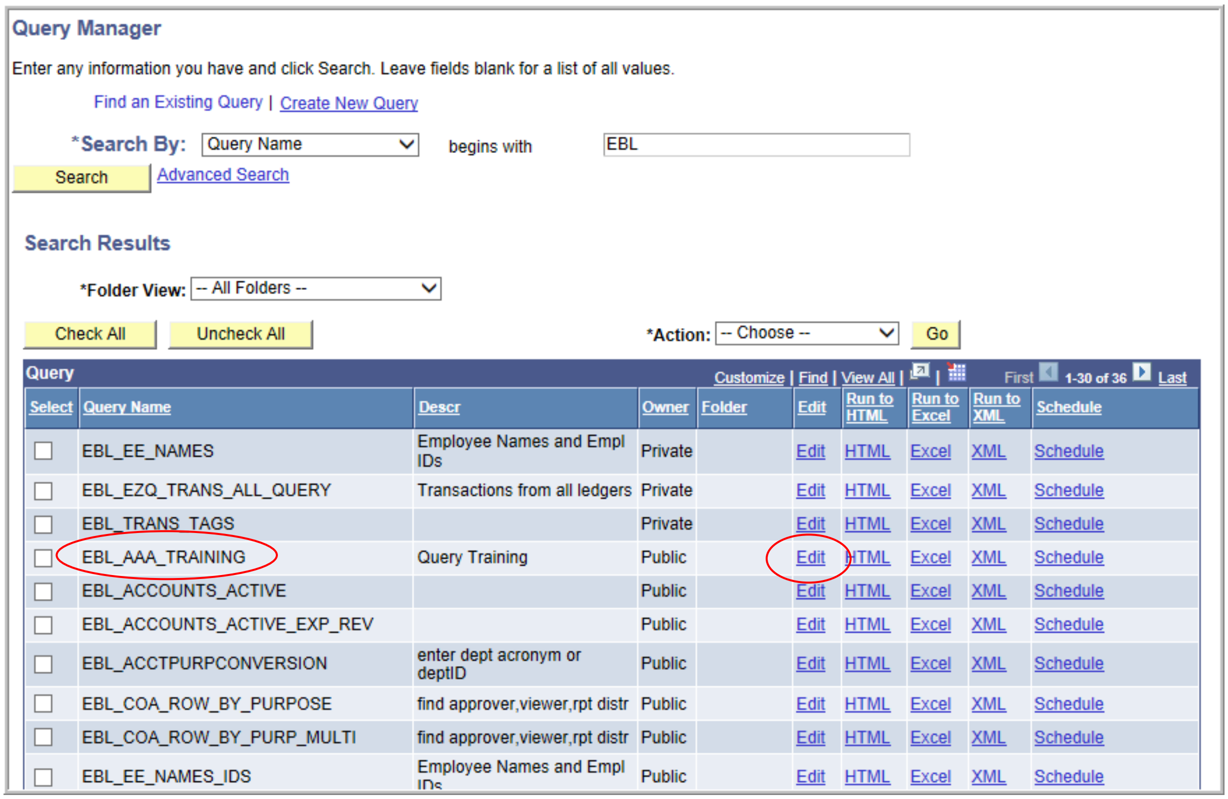


2. The default for this page is **Find an Existing Query**, no need to click the link

Note: Before you create a new query, search for your initials to confirm that they are unique to the database. Type your initials in the **begins with** field and then click **Search**. If you do not receive any results, you can use your initials. If you receive results, you will need to create a unique 3-character beginning for the name of your query.

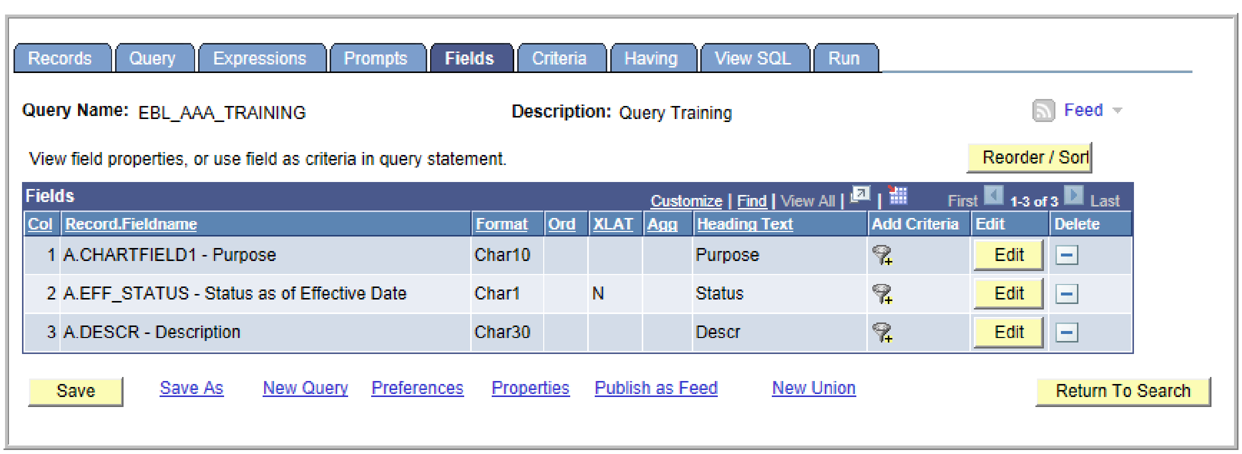
3. To find a specific query, type the first few letters of the name of the query in the **Search For** field. This field is not case-sensitive. For this exercise, in the **Search For** field, type the letters: **`ebl`**

4. Click **Search**. You should see the following Search Results:



5. To view a query, click **Edit** on the row of the query you want to view.

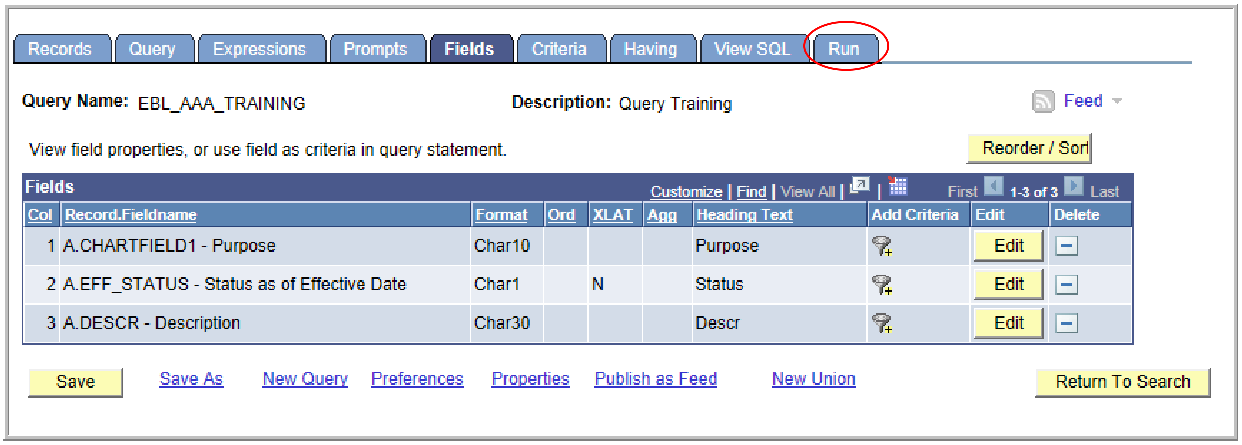
6. For this exercise, click **EBL_AAA_TRAINING**. You should see the following:



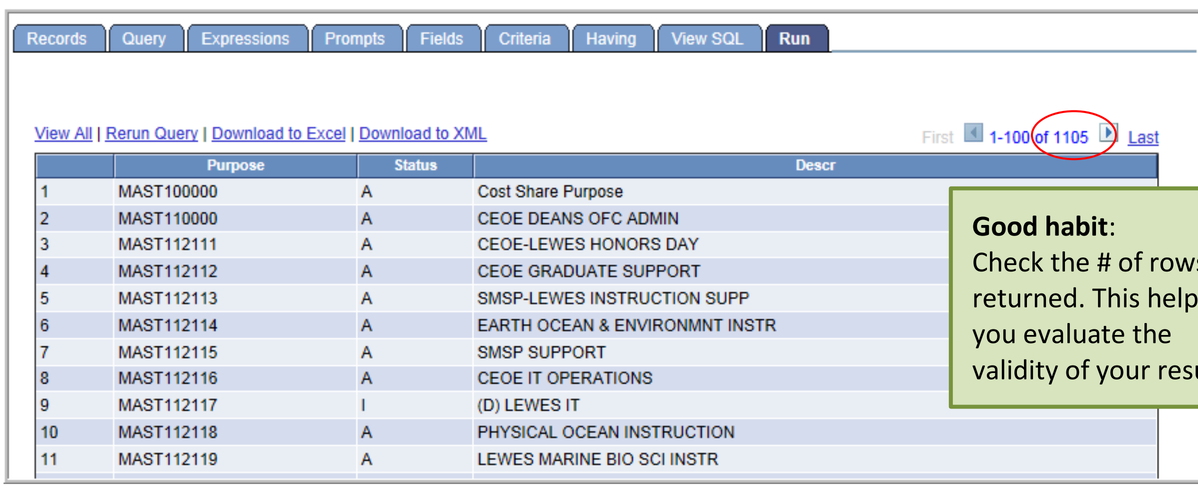
Across the top of the page, you will see a row of tabs, each with a label (e.g., **Records**, **Query**, **Fields**, etc.). These pages contain additional information about the query you are viewing.

Below the tabs, you will see the name of the query in the **Query Name** field and the description of the query in the **Description** field.

Note: In the **Format** column (the second column), you will see each field described as **Char**, **Num**, or **SNm**. **Char** designates a character; **Num** or **SNm** designate a number. When you work with a query, take note of these designations because they are useful when you work with expressions such as numerical manipulation, substrings, concatenate, and decode.



7. To run the query, click the **Run** tab
8. When the processing is complete, your results should look like this:



Good habit:
Check the # of rows returned. This helps you evaluate the validity of your results.

--End of Exercise--

Creating a New Query

Note: PS terminology for "table" is "record."

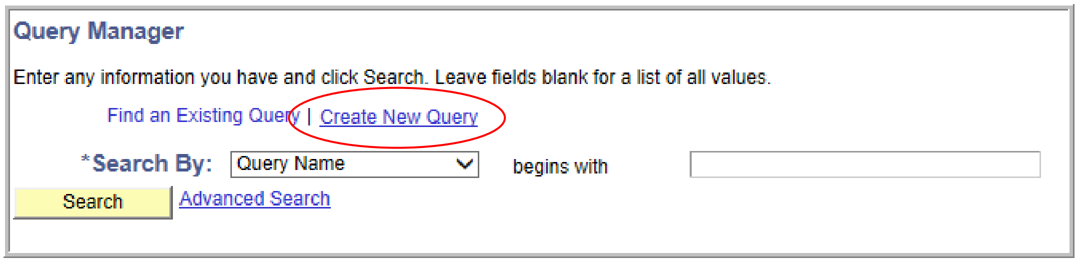
The basic steps to create a new query are the following:

- select the record on which to base the query
- add fields to the query content
- specify selection criteria
- format the query output
- run the query
- save the query

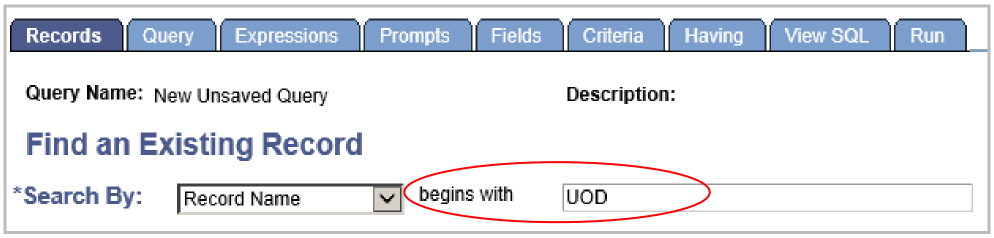
Exercise 4—How to Create a New Query

1. If necessary, navigate to the **Query Manager** (see instructions in exercise number 1). If you are already working within **Query**, click **Query Manager** in the **Navigation Bar** at the top of the page.

2. Click the **Create New Query** link:



3. The **Find an Existing Record** search page will appear:

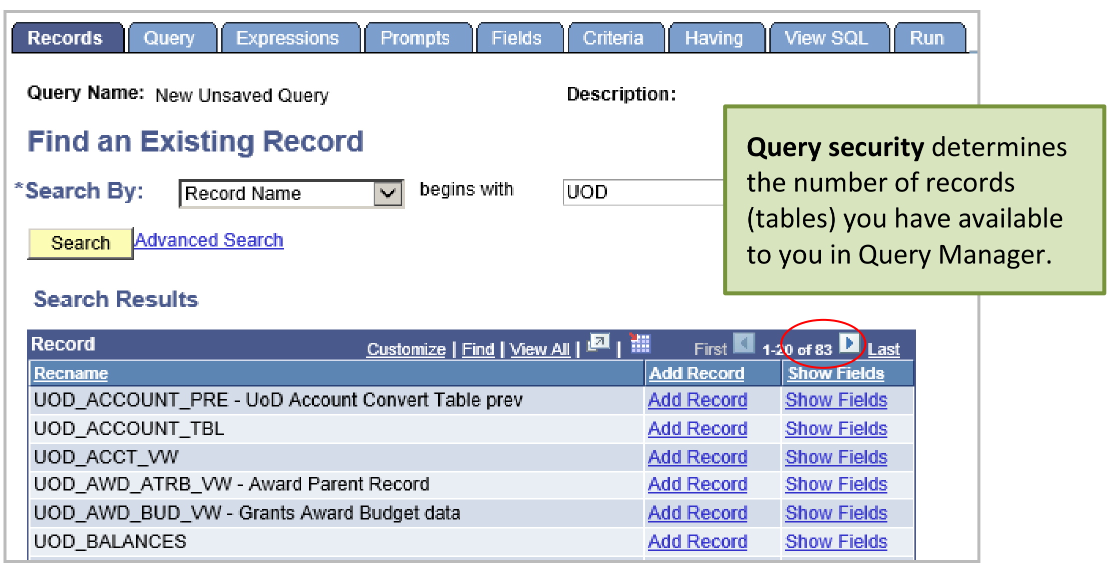


This page is the first in a series of pages that you use to define a query within **Query Manager**. You can access each of the pages by clicking the tab at the top of the page.

❖ **First, we'll look at one of the most frequently used records (tables) to start to get familiar with the data in UD Financials.**

4. In the **Search by** field (this field ***is not case-sensitive***), type **UOD**

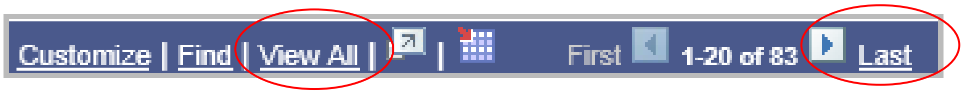
5. Click **Search** button. You should see a page similar to the following:



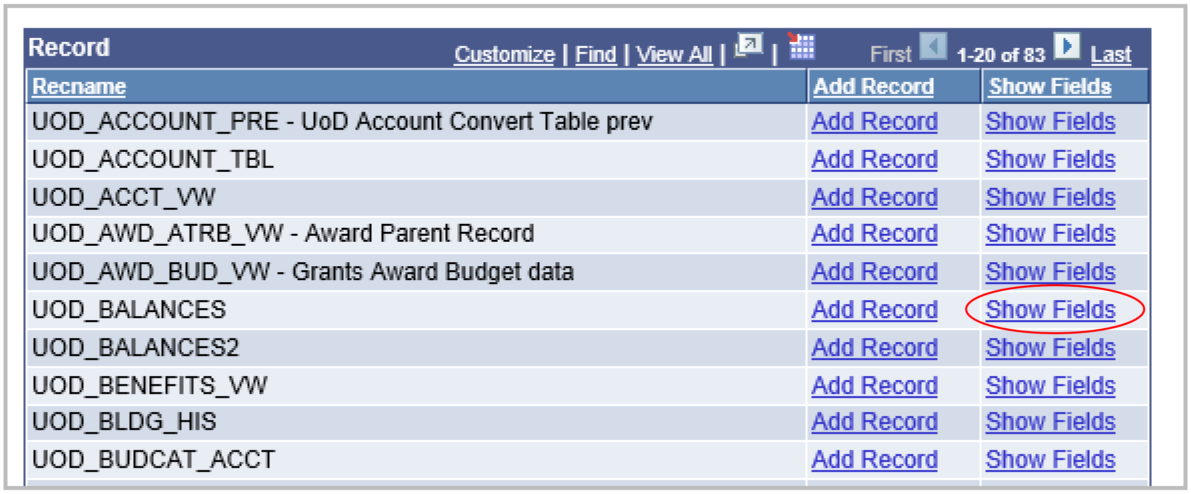
These are the custom UD tables, some of the most useful to you will be:

UOD_BALANCES – Purpose balances
UOD_TRANS_DTL – Purpose transaction details
UOD_TRN_NOTE_VW – Transaction tag details (click the **Last** link to find it)

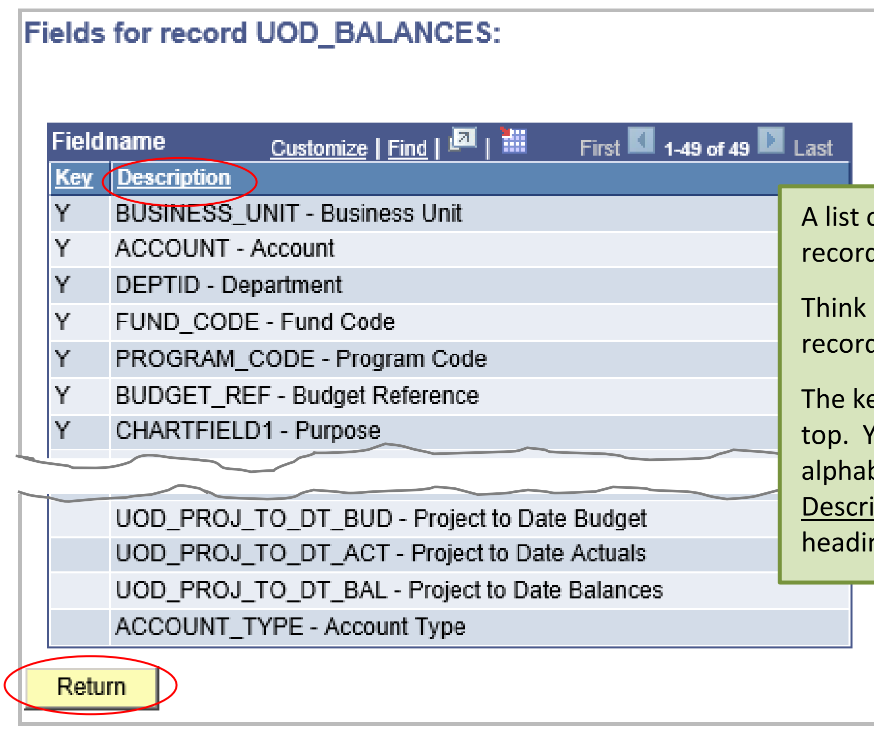
Note: Sometimes the record you want to use will be located near the bottom of the list, click one of the links labeled **View All** or **Last** or use the arrow buttons in the blue **Record** header. The links look similar to the following:



6. Click the **Show Fields** link to see fields in **UOD_BALANCES**.



You should see the following:



A list of the 49 fields in the record will be displayed.

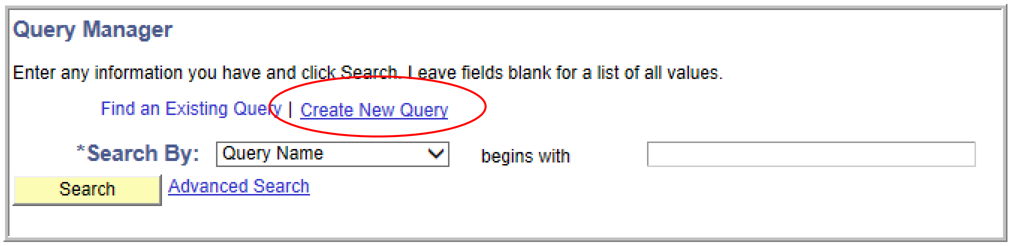
Think of the fields in the record as columns in a table.

The key fields display at the top. You can sort the fields alphabetically by clicking the Description link in the heading.

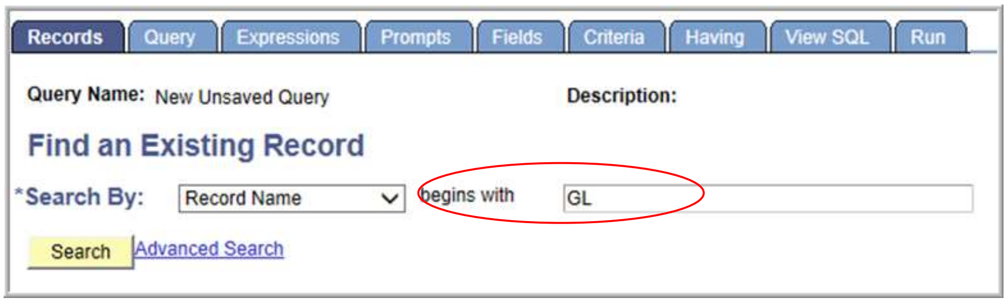
7. Click the **Return** button to go back to the list of records (tables).

❖ **Next, we'll create a new query with a standard PS record (table).**

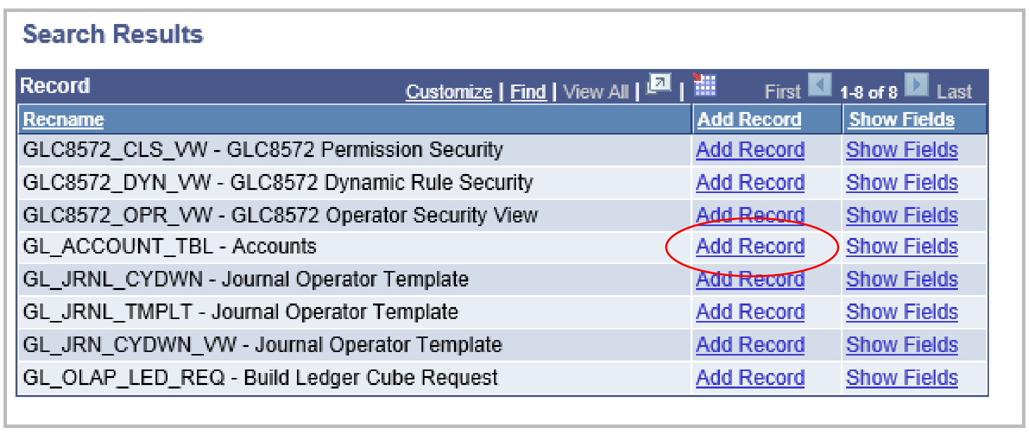
8. Click **Query Manager** in the Navigation Bar at the top of the page.
9. Click the **<u>Create New Query</u>** link:



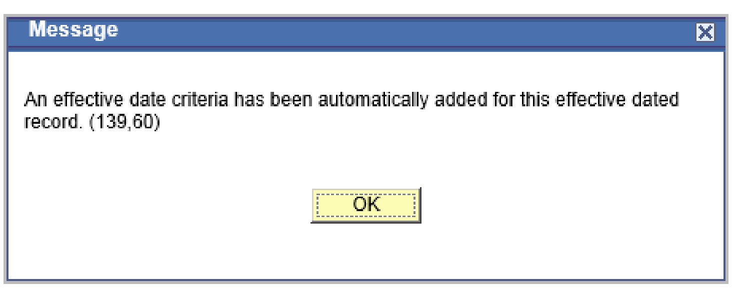
10. The **Find an Existing Record** search page will appear. In the **Search by** field, type **GL**



11. You should see a page similar to the following. Click the **<u>Add Record</u>** link for **GL_ACCOUNT_TBL**.



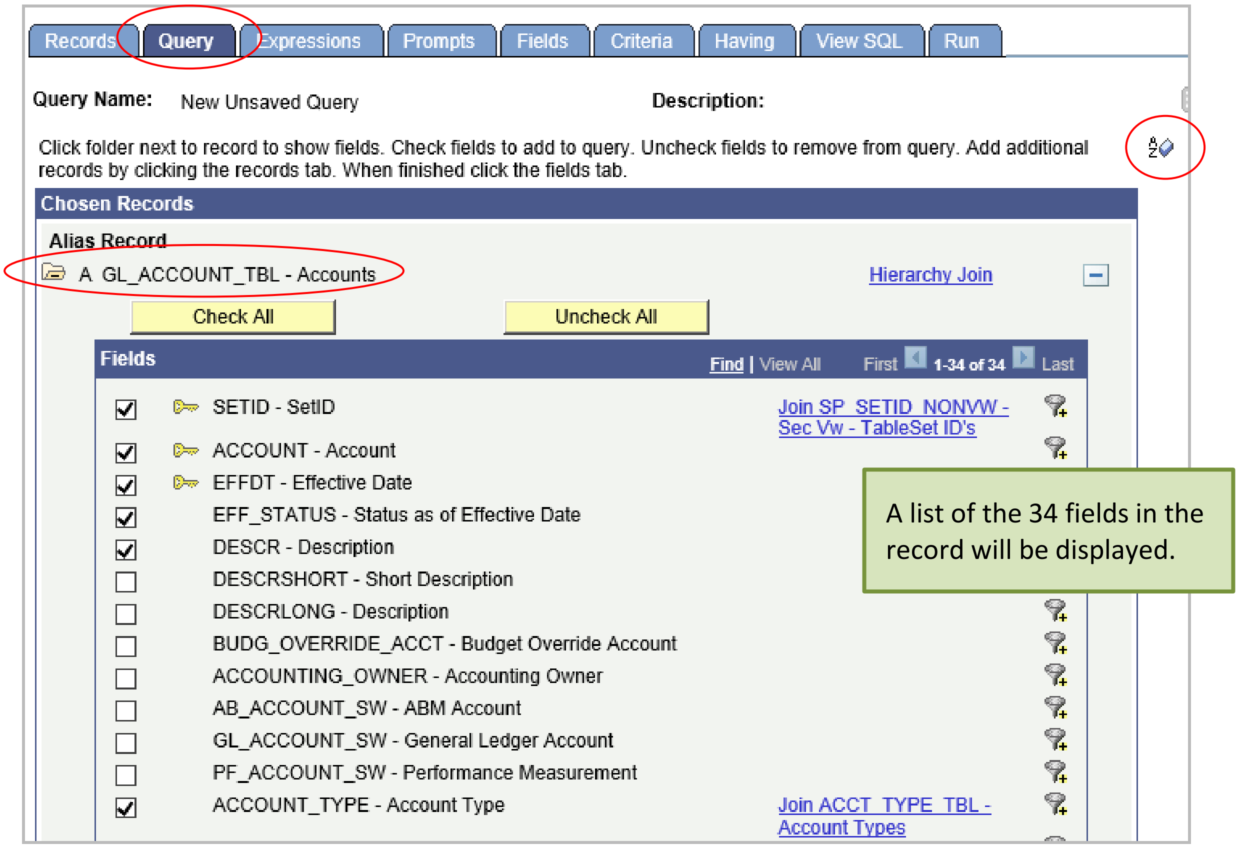
12. Click **OK** when this message box appears. It will automatically create a criteria because this record is effective dated.



Effective Date:
Tables with values that are subject to change over time have Effective Dates so that an accurate history can be maintained.

For example the **GL Dept** table is effective dated so that department name changes can be stored historically.

You should now be viewing the **Query** tab, which should look similar to the following:



Note: PS names the first record you select as "A".
If you use more than one record in a query, PS will name the second record "B", etc.

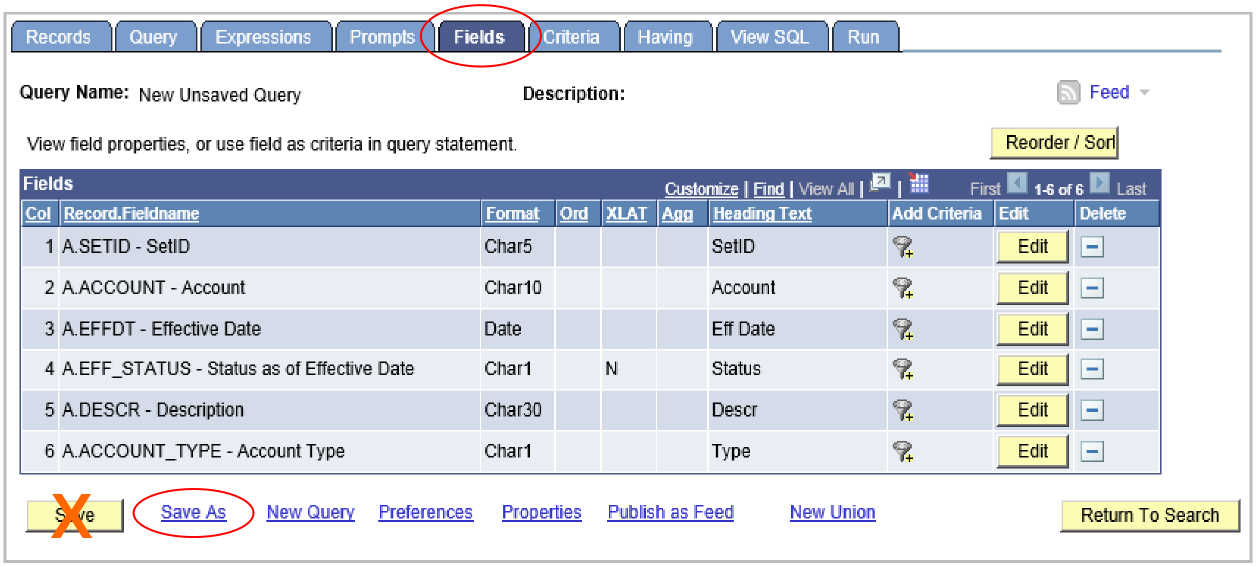
13. For this exercise, you will select the following fields. Click the checkmark box in front of each of the following seven fields:
    - **SETID – SetID**
    - **ACCOUNT - Account**
    - **EFFDT – Effective Date**
    - **EFF_STATUS – Status as of Effective Date**
    - **DESC - Description**
    - **ACCOUNT_TYPE – Account Type**

Helpful Hint: The A-Z button ( ) located in the upper right-hand corner sorts the fields in alphabetical order. It is a toggle button—if you click it once the fields are alphabetized; if you click it a second time, the fields return to their original order.

Note: On the right-hand side of the page you will see information about "joins" (underlined blue text). We will discuss this topic in a later exercise. Query Security determines which table joins you will see.

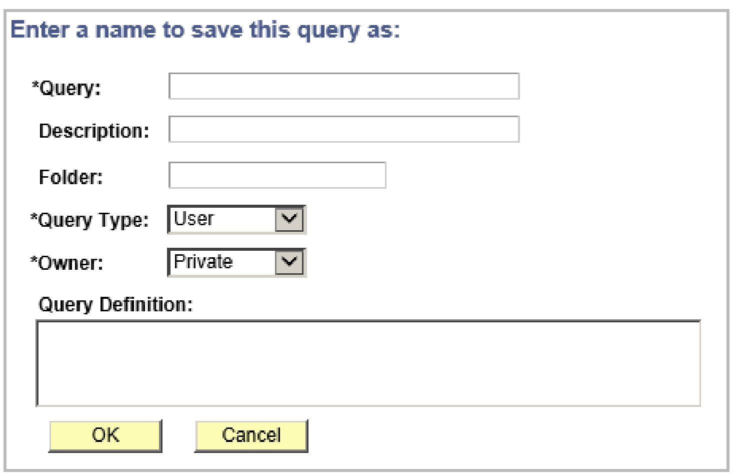
14. Click the **Fields** tab.

    You should see following page, which lists the fields you selected in the previous step.



15. Save the query with the **Save As** link.
    (NEVER use the **Save** button, it is too easy to overwrite a Public query).

    You should see a page that looks similar to the following:



Note: Keep in mind the following naming conventions when you create a name for a new query:

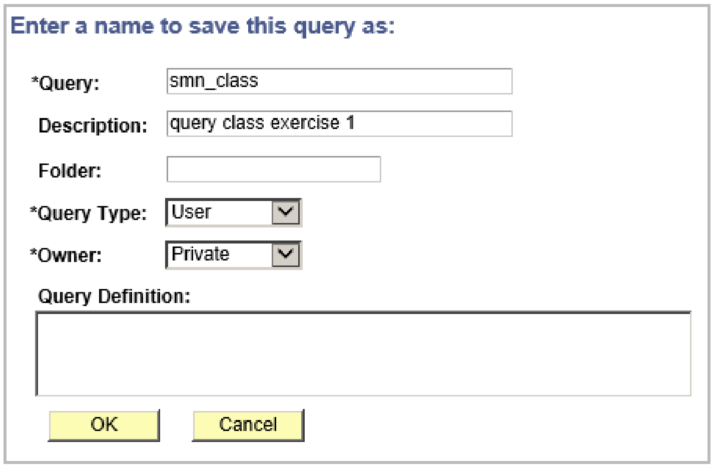
- Before you save the query, confirm that someone else doesn't have the same initials you do.
- If your initials are not already in use, name your query using the first three initials of your name.

16. Enter the following:

    Query - type the name of the query: **`xxx_class`** (where **xxx** represents your initials).
    For example, if your name is Shannon Michelle North, you would type **`smn_class`**.

    Description - type: **`query class exercise 1`**
    Query Type - confirm that **User** is selected.
    Owner - confirm that **Private** is selected.

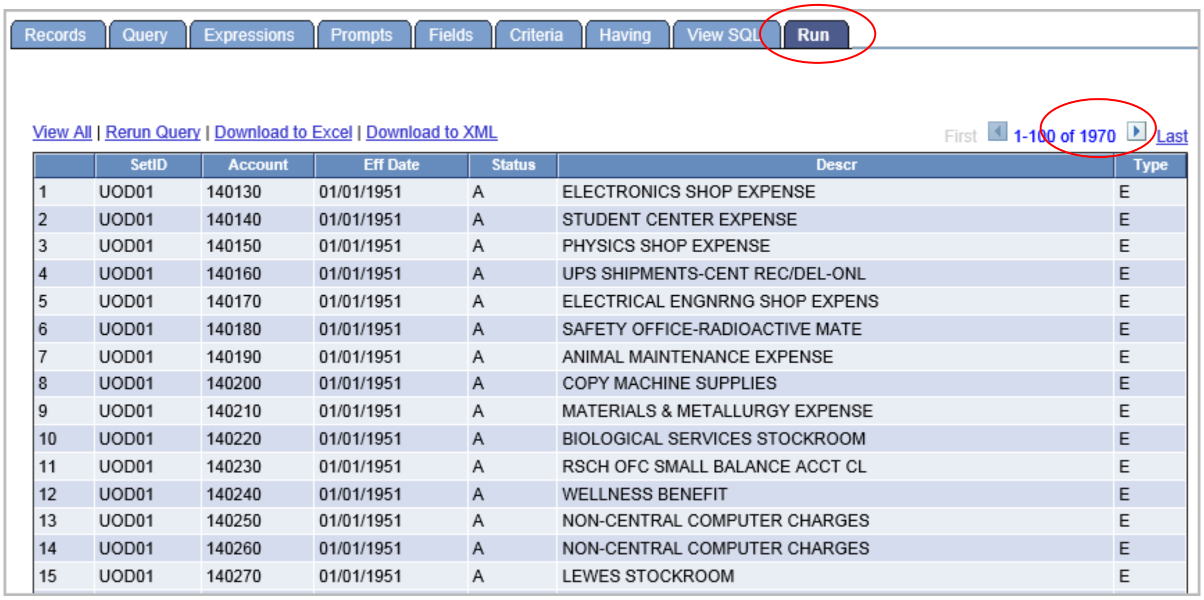
17. Your completed **Save As** page will look similar to this:



18. Click **OK**.

19. Click the **Run** tab.

    You should see a page similar to the following:



	SetID	Account	Eff Date	Status	Descr	Type
1	UOD01	140130	01/01/1951	A	ELECTRONICS SHOP EXPENSE	E
2	UOD01	140140	01/01/1951	A	STUDENT CENTER EXPENSE	E
3	UOD01	140150	01/01/1951	A	PHYSICS SHOP EXPENSE	E
4	UOD01	140160	01/01/1951	A	UPS SHIPMENTS-CENT REC/DEL-ONL	E
5	UOD01	140170	01/01/1951	A	ELECTRICAL ENGNRNG SHOP EXPENS	E
6	UOD01	140180	01/01/1951	A	SAFETY OFFICE-RADIOACTIVE MATE	E
7	UOD01	140190	01/01/1951	A	ANIMAL MAINTENANCE EXPENSE	E
8	UOD01	140200	01/01/1951	A	COPY MACHINE SUPPLIES	E
9	UOD01	140210	01/01/1951	A	MATERIALS & METALLURGY EXPENSE	E
10	UOD01	140220	01/01/1951	A	BIOLOGICAL SERVICES STOCKROOM	E
11	UOD01	140230	01/01/1951	A	RSCH OFC SMALL BALANCE ACCT CL	E
12	UOD01	140240	01/01/1951	A	WELLNESS BENEFIT	E
13	UOD01	140250	01/01/1951	A	NON-CENTRAL COMPUTER CHARGES	E
14	UOD01	140260	01/01/1951	A	NON-CENTRAL COMPUTER CHARGES	E
15	UOD01	140270	01/01/1951	A	LEWES STOCKROOM	E

You should see six columns and a number of rows of data. Note the number of rows you receive, which is indicated above the right-most column on the page. In this example page, 1970 rows are returned. You cannot sort the results on the Run tab, go to the Fields tab and use the Reorder / Sort button.

Pages Used to Create a Query

The pages listed in the following table are those used to create a new query.

Note: The following table is based on information from the PS PeopleBooks online documentation. This information is included here for reference.

Page Name	Definition Name	Navigation	Usage
Query	QRY_QUERY	Reporting Tools, Query, Query Manager Click the Create New Query link on the Query Manager search page. Click the Search button. Click the Add Record link to select a record for the query.	Select a record for the query criteria.
Fields	QRY_FIELDS	Reporting Tools, Query, Query Manager, Fields Select each field that you want to use in the query, and then click the Add Criteria icon, or click the Check All button to select all the fields associated with the record as criteria.	Select the fields to be used as criteria for the query.
Criteria	QRY_CRITERIA	Reporting Tools, Query, Query Manager, Criteria	View and edit selection criteria for your query statement.
Edit Criteria Properties	QRY_CRITERIA_ SEC	Reporting Tools, Query, Query Manager, Criteria Click the Add Criteria button on the Criteria page or click the Use As Criteria link on the Fields page.	Edit selection criteria properties for your query statement.

--End of Exercise--

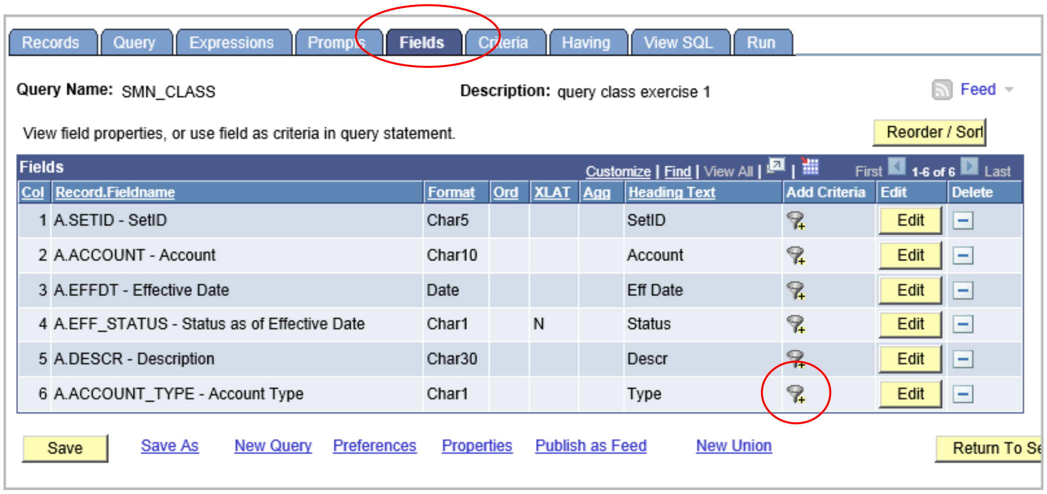
Adding New Criteria to a Field in a Query

You can view data for a specific department by adding criteria to a field in a query. The next exercise explains how to add new criteria to the **A.DEPTID - Department** field and shows you how to add the criteria that every query needs.

In addition to adding criteria to filter the information you want to see, there is a criteria that you should add to your query to enhance performance.

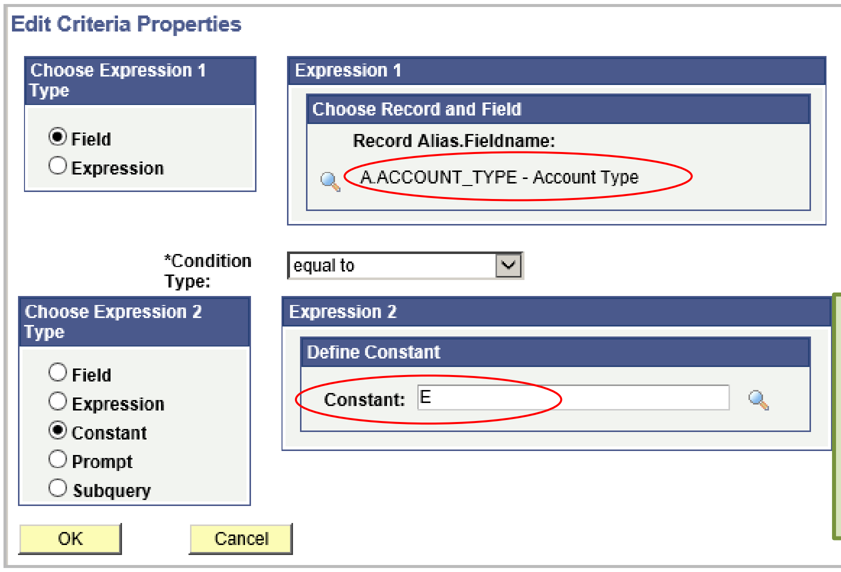
Exercise 5—How to Add New Criteria to a Query

1. Click the **Fields** tab.
You should see a page similar to the following:



2. On the **A.ACCOUNT_TYPE – Account Type** field, click the **Add Criteria** icon 

3. You will see the **Edit Criteria Properties** page:



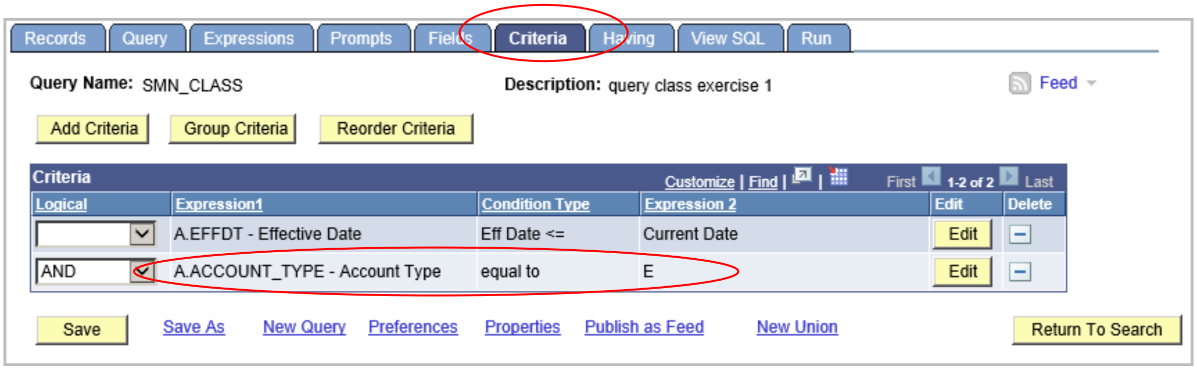
The 5 Account Types are:
Expense (E)
Revenue (R)
Asset (A)
Liability (L)
Net Assets (Q)

4. In the **Define Constant** box, type: **E** (not case sensitive)

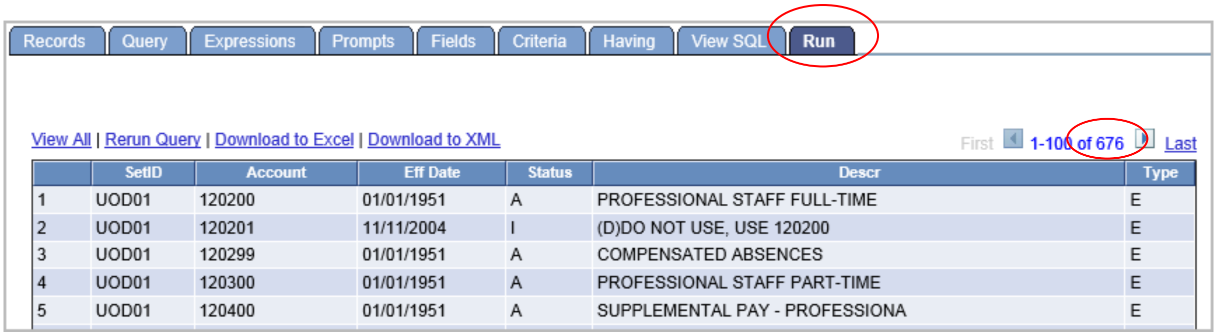
Note: Because you chose to add criteria to the **A.ACCOUNT_TYPE** field, that field is automatically placed in the **Choose Record and Field** box. To select a different field, click the magnifying glass icon in this box.

5. Click **OK**. You will return to the **Fields** page.

6. Click the **Criteria** tab to view the criteria you've added.
(**A.EFFDT – Effective Date** criteria was added automatically when you chose this record.)



7. Click the **Run** tab.



Note that you now have fewer rows and all of your rows have Type = E. This sample has 676 rows.

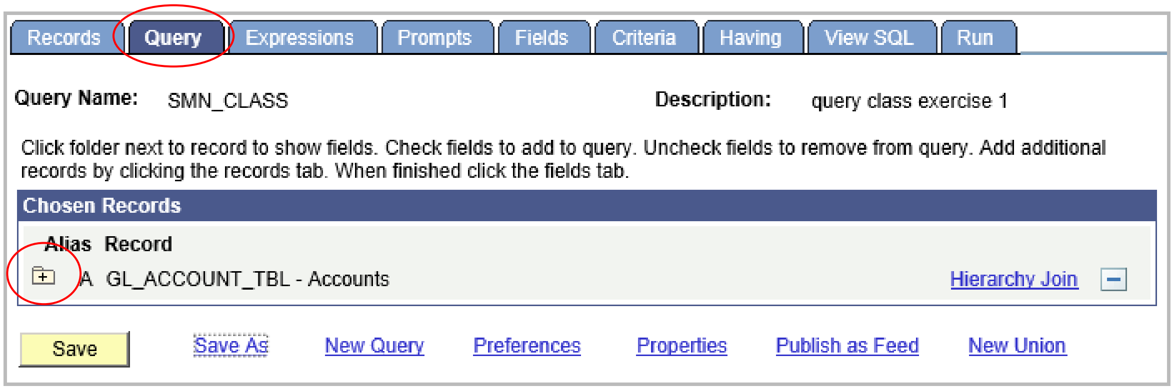
--End of Exercise--

Adding a New Field to a Query

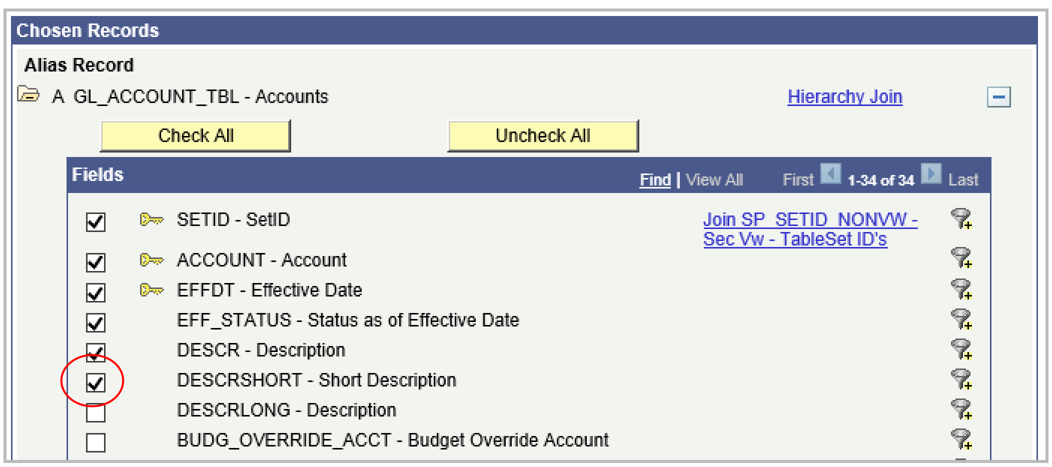
If you decide you want to see more information for each row, you can add a new field to a query. In the next exercise, you will add the **UOD_CHRTFLD1_DESCR – Description** field to the query you've created.

Exercise 6—How to Add a New Field to a Query

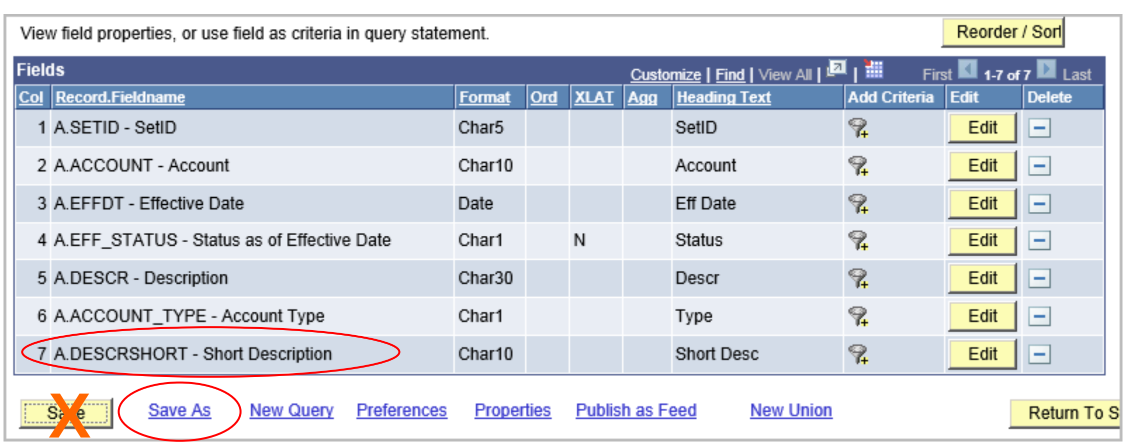
1. Click the **Query** tab to view the available fields.
2. Click the record icon to show the available fields



3. Click the checkbox in front of the field: **DESCRSHORT - Short Description**

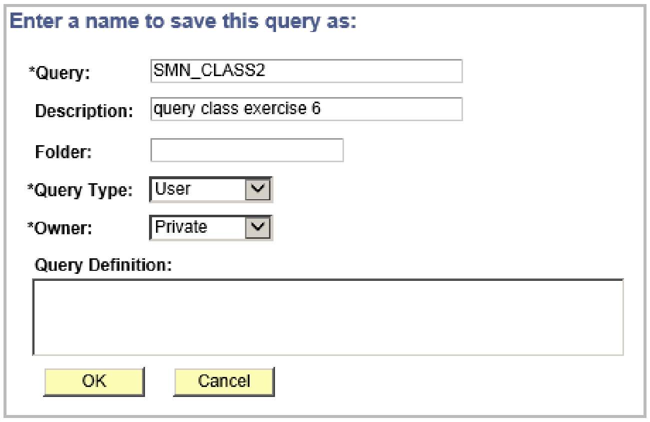


4. Click the **Fields** tab to confirm that the field has been added to the list of fields.



5. Click the **Save As** link.

6. In the **Query** field - type: **`xxx_class2`** (where **xxx** are your initials)
7. In the **Description** field – type: **`query class exercise 6`**
8. Click **OK**.

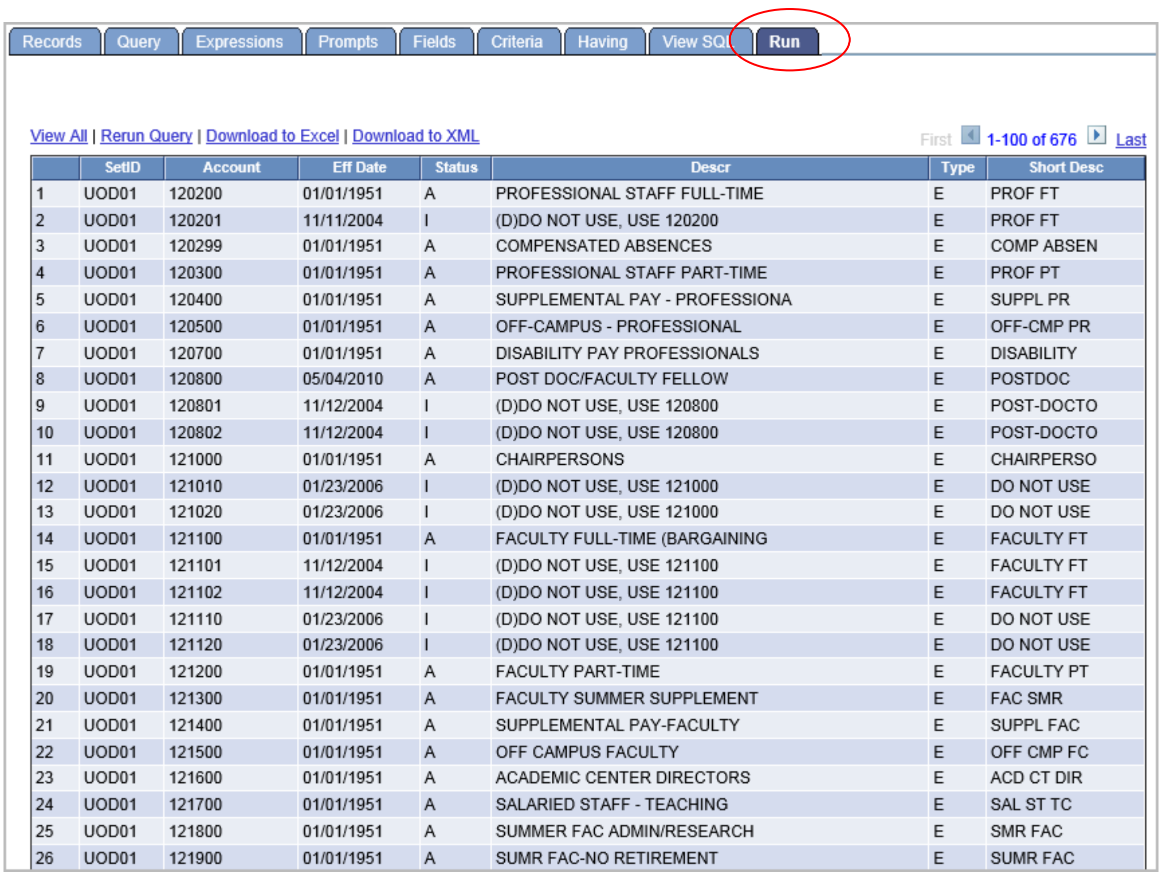

Enter a name to save this query as:

*Query: SMN_CLASS2
Description: query class exercise 6
Folder:
*Query Type: User
*Owner: Private
Query Definition:

OK Cancel

9. Click the **Run** tab.

   Note the new column on the far right for **Short Descr**.


Records | Query | Expressions | Prompts | Fields | Criteria | Having | View SQL | Run

View All | Rerun Query | Download to Excel | Download to XML

First 1-100 of 676 Last

	SetID	Account	Eff Date	Status	Descr	Type	Short Desc
1	UOD01	120200	01/01/1951	A	PROFESSIONAL STAFF FULL-TIME	E	PROF FT
2	UOD01	120201	11/11/2004	I	(D)DO NOT USE, USE 120200	E	PROF FT
3	UOD01	120299	01/01/1951	A	COMPENSATED ABSENCES	E	COMP ABSEN
4	UOD01	120300	01/01/1951	A	PROFESSIONAL STAFF PART-TIME	E	PROF PT
5	UOD01	120400	01/01/1951	A	SUPPLEMENTAL PAY - PROFESSIONA	E	SUPPL PR
6	UOD01	120500	01/01/1951	A	OFF-CAMPUS - PROFESSIONAL	E	OFF-CMP PR
7	UOD01	120700	01/01/1951	A	DISABILITY PAY PROFESSIONALS	E	DISABILITY
8	UOD01	120800	05/04/2010	A	POST DOC/FACULTY FELLOW	E	POSTDOC
9	UOD01	120801	11/12/2004	I	(D)DO NOT USE, USE 120800	E	POST-DOCTO
10	UOD01	120802	11/12/2004	I	(D)DO NOT USE, USE 120800	E	POST-DOCTO
11	UOD01	121000	01/01/1951	A	CHAIRPERSONS	E	CHAIRPERSO
12	UOD01	121010	01/23/2006	I	(D)DO NOT USE, USE 121000	E	DO NOT USE
13	UOD01	121020	01/23/2006	I	(D)DO NOT USE, USE 121000	E	DO NOT USE
14	UOD01	121100	01/01/1951	A	FACULTY FULL-TIME (BARGAINING	E	FACULTY FT
15	UOD01	121101	11/12/2004	I	(D)DO NOT USE, USE 121100	E	FACULTY FT
16	UOD01	121102	11/12/2004	I	(D)DO NOT USE, USE 121100	E	FACULTY FT
17	UOD01	121110	01/23/2006	I	(D)DO NOT USE, USE 121100	E	DO NOT USE
18	UOD01	121120	01/23/2006	I	(D)DO NOT USE, USE 121100	E	DO NOT USE
19	UOD01	121200	01/01/1951	A	FACULTY PART-TIME	E	FACULTY PT
20	UOD01	121300	01/01/1951	A	FACULTY SUMMER SUPPLEMENT	E	FAC SMR
21	UOD01	121400	01/01/1951	A	SUPPLEMENTAL PAY-FACULTY	E	SUPPL FAC
22	UOD01	121500	01/01/1951	A	OFF CAMPUS FACULTY	E	OFF CMP FC
23	UOD01	121600	01/01/1951	A	ACADEMIC CENTER DIRECTORS	E	ACD CT DIR
24	UOD01	121700	01/01/1951	A	SALARIED STAFF - TEACHING	E	SAL ST TC
25	UOD01	121800	01/01/1951	A	SUMMER FAC ADMIN/RESEARCH	E	SMR FAC
26	UOD01	121900	01/01/1951	A	SUMR FAC-NO RETIREMENT	E	SUMR FAC

--End of Exercise-

Using Other Condition Types

A condition type determines how Query Manager compares the values of the first (left-hand) expression to the second (right-hand) expression. The following table describes the available condition types**. For each of the condition types, Query Manager offers a *not* option that reverses its effect. For example, *not equal to* returns all rows that *equal to* would not return.**

Note: It's always better to use the *not* version of an operator rather than the NOT operator on the entire criterion. When you use NOT, Query can't use SQL indexes to increase the data search. When you use the *not* version of an operator, Query can translate it into a SQL expression, which enables it to use the indexes.

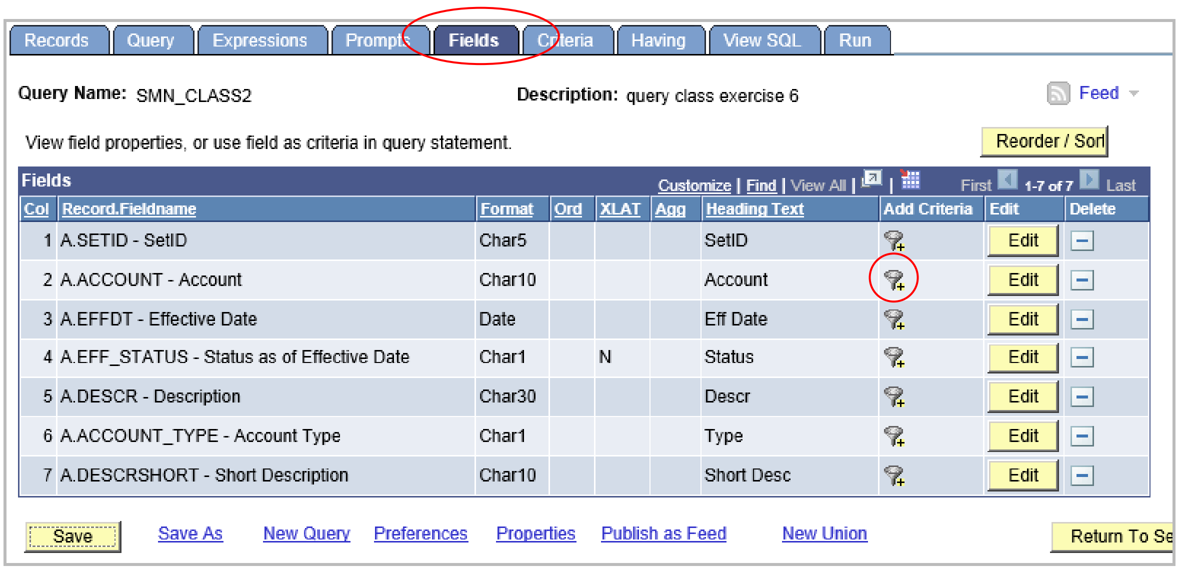
Condition Types	When It Returns a Row
between	The value in the selected record field falls between two comparison values. The range is inclusive.
equal to	The value in the selected record field exactly matches the comparison value.
exists	This operator is different from the others, in that it doesn't compare a record field to the comparison value. The comparison value is a subquery. If the subquery returns any data, PS Query returns the corresponding row.
greater than	The value in the record field is greater than the comparison value.
in list	The value in the selected record field matches one of the comparison values in a list.
in tree	The value in the selected record field appears as a node in a tree created with PS Tree Manager. The comparison value for this operator is a tree or branch of a tree that you want PS Query to search.
is null	The selected record field doesn't have a value in it. You don't specify a comparison value for this operator. Key fields, required fields, character fields, and numeric fields do not allow null values.
less than	The value in the record field is less than the comparison value.
like	The value in the selected field matches a specified string pattern. The comparison value may be a string that contains wildcard characters. The wildcard characters that PS Query recognizes are % and _. % matches any string of zero or more characters. For example, C% matches any string starting with C, including C alone. _ matches any single character. For example, _ones matches any five-character string ending with *ones,* such as Jones or Cones. PS Query also recognizes any wildcard characters that your database software supports. See your database management system documentation for details. To use one of the wildcard characters as a literal character (for example, to include a % in your string), precede the character with a \ (for example, percent\%\).

Note: If you've selected the EFFDT field on an effective-dated table, PS Query also offers special effective date operators.

Exercise 7—How to Use Other Condition Types

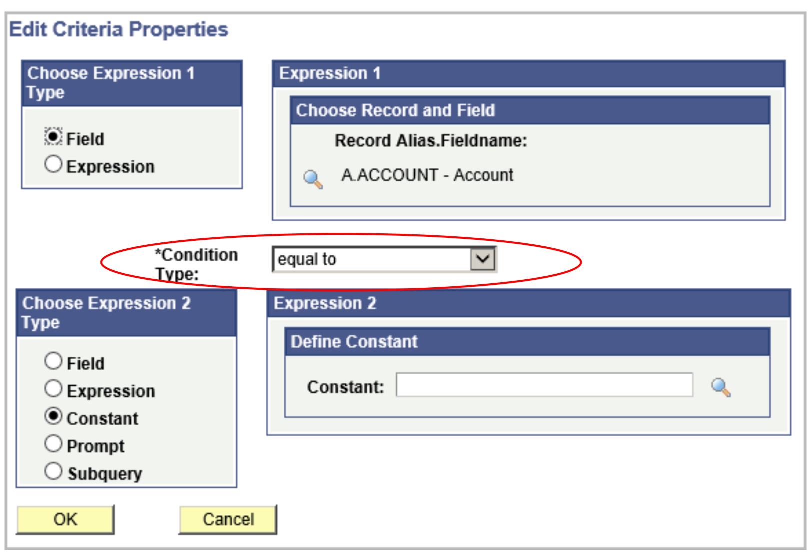
You can specify criteria in many ways. In an earlier exercise, you selected data where the Account Type was equal to a specific value. You may want to see data where a field is between a range of data, or greater than or less than a value, etc. You may also want to use wildcard characters in your criteria. In the following exercise, you will specify a range of values for the account field.

1. Click the **Fields** tab.



2. On the **A.ACCOUNT - Account** field, click the **Add Criteria** icon

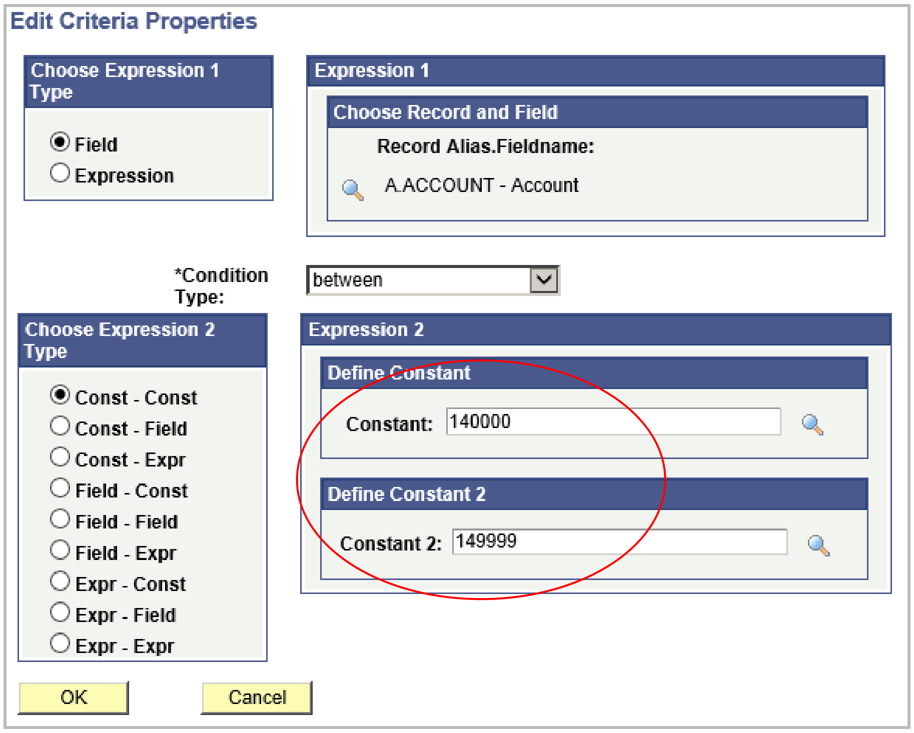
   You will see the **Edit Criteria Properties** page:



3. In the **Condition Type** field, click the drop-down arrow and select **between**.

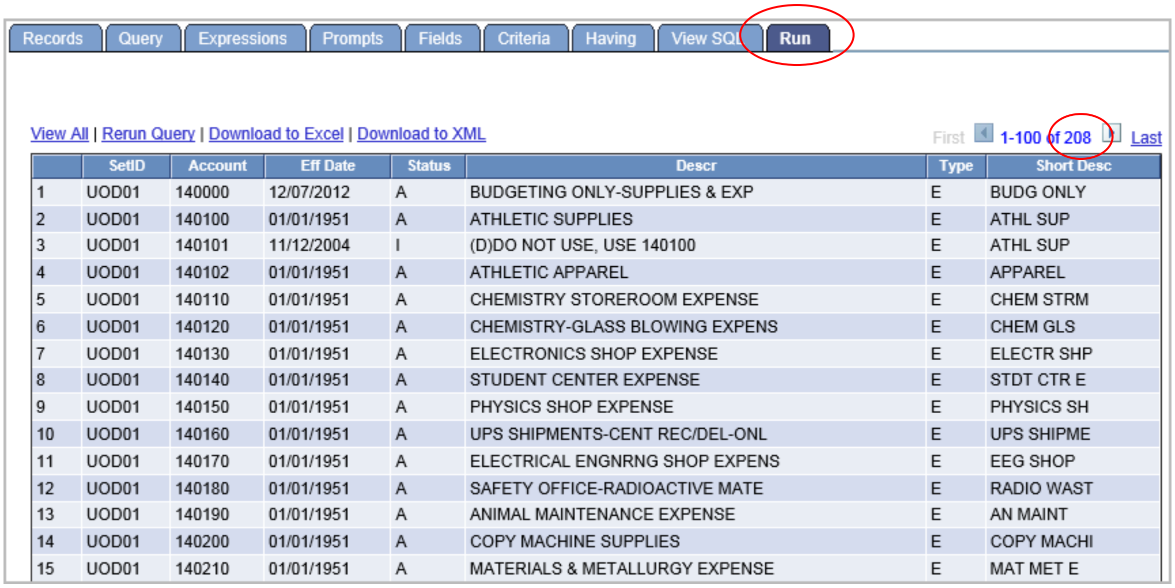
4. In the **Expression 2** box, you will see two blank fields.
   - In the top field (**Define Constant**), type: **140000**
   - In the bottom field (**Define Constant 2**), type: **149999**

   Your page should now look like this:



5. Click **OK**.
6. Click **Save As** link to save your work. Click **OK**.
7. Click the **Run** tab.

   Your results should look like this. Note how many rows you now see.



	SetID	Account	Eff Date	Status	Descr	Type	Short Desc
1	UOD01	140000	12/07/2012	A	BUDGETING ONLY-SUPPLIES & EXP	E	BUDG ONLY
2	UOD01	140100	01/01/1951	A	ATHLETIC SUPPLIES	E	ATHL SUP
3	UOD01	140101	11/12/2004	I	(D)DO NOT USE, USE 140100	E	ATHL SUP
4	UOD01	140102	01/01/1951	A	ATHLETIC APPAREL	E	APPAREL
5	UOD01	140110	01/01/1951	A	CHEMISTRY STOREROOM EXPENSE	E	CHEM STRM
6	UOD01	140120	01/01/1951	A	CHEMISTRY-GLASS BLOWING EXPENS	E	CHEM GLS
7	UOD01	140130	01/01/1951	A	ELECTRONICS SHOP EXPENSE	E	ELECTR SHP
8	UOD01	140140	01/01/1951	A	STUDENT CENTER EXPENSE	E	STDT CTR E
9	UOD01	140150	01/01/1951	A	PHYSICS SHOP EXPENSE	E	PHYSICS SH
10	UOD01	140160	01/01/1951	A	UPS SHIPMENTS-CENT REC/DEL-ONL	E	UPS SHIPME
11	UOD01	140170	01/01/1951	A	ELECTRICAL ENGNRNG SHOP EXPENS	E	EEG SHOP
12	UOD01	140180	01/01/1951	A	SAFETY OFFICE-RADIOACTIVE MATE	E	RADIO WAST
13	UOD01	140190	01/01/1951	A	ANIMAL MAINTENANCE EXPENSE	E	AN MAINT
14	UOD01	140200	01/01/1951	A	COPY MACHINE SUPPLIES	E	COPY MACHI
15	UOD01	140210	01/01/1951	A	MATERIALS & METALLURGY EXPENSE	E	MAT MET E

--End of Exercise--

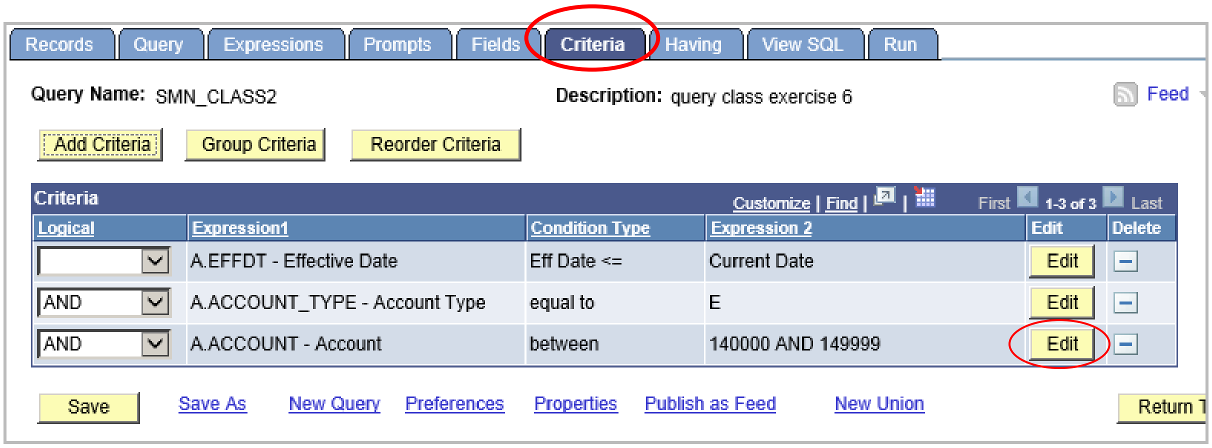
Using Wildcards

You could have requested the information in the above exercise in another way. For example, you could have asked for all accounts that start with the characters 14. There are two ways to do this:

- The **percent sign (%)** is a wildcard that represents any number of characters. So, “14%” represents any character string beginning with “14” and followed by zero or other characters.
- The **underscore character (_)** is a wildcard that represents one character. So, “14____” (four underscores) represents “14XXXX” where “X” is any character.

Exercise 8—How to Use a Wildcard

1. To remove the added criteria (currently set to **between**), click the **Criteria** tab. You should see a page similar to the following:

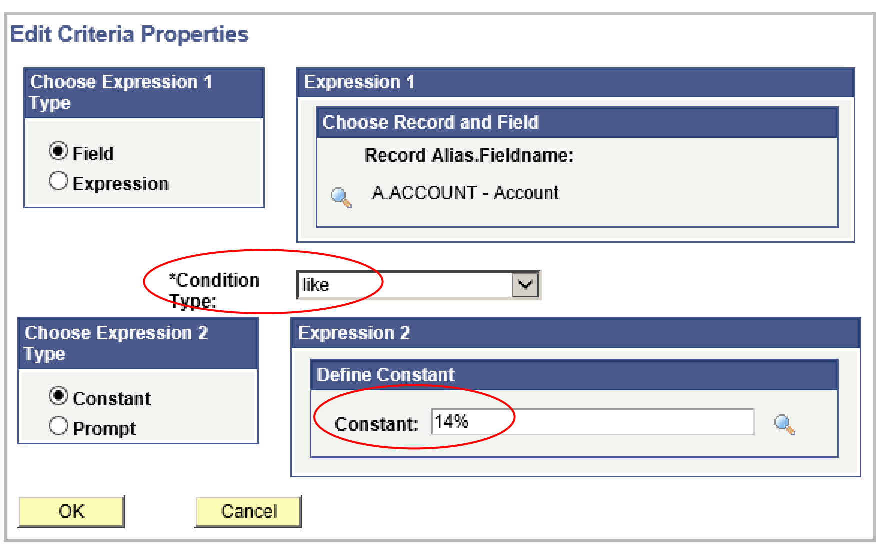


2. On the **A.ACCOUNT - Account** field, click the **Edit** button Edit.

In the **Edit Criteria Properties** page:

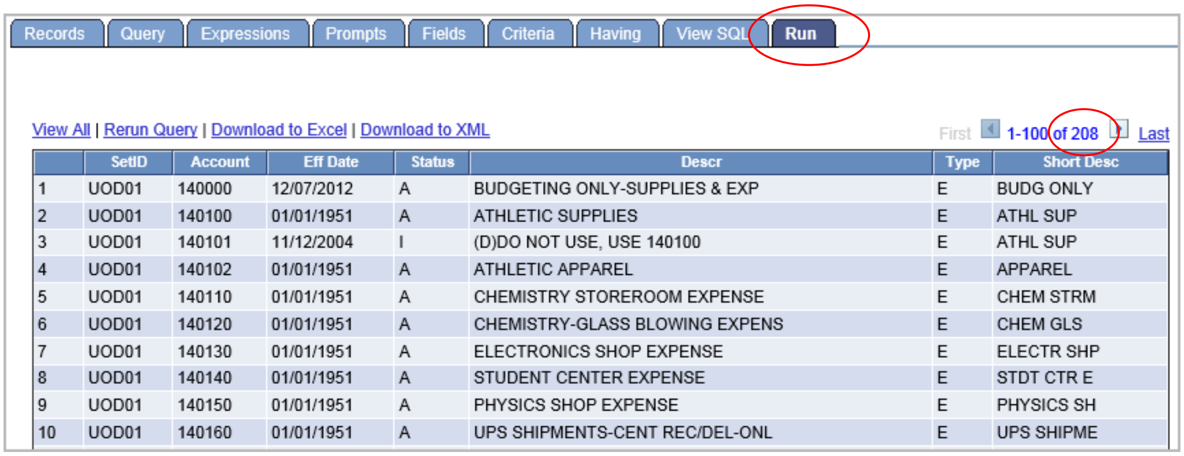
3. **Condition Type** - click the drop-down arrow and select **like**.
4. In the **Expression 2 - Define Constant** field, type: **14%**

Your page should look this:

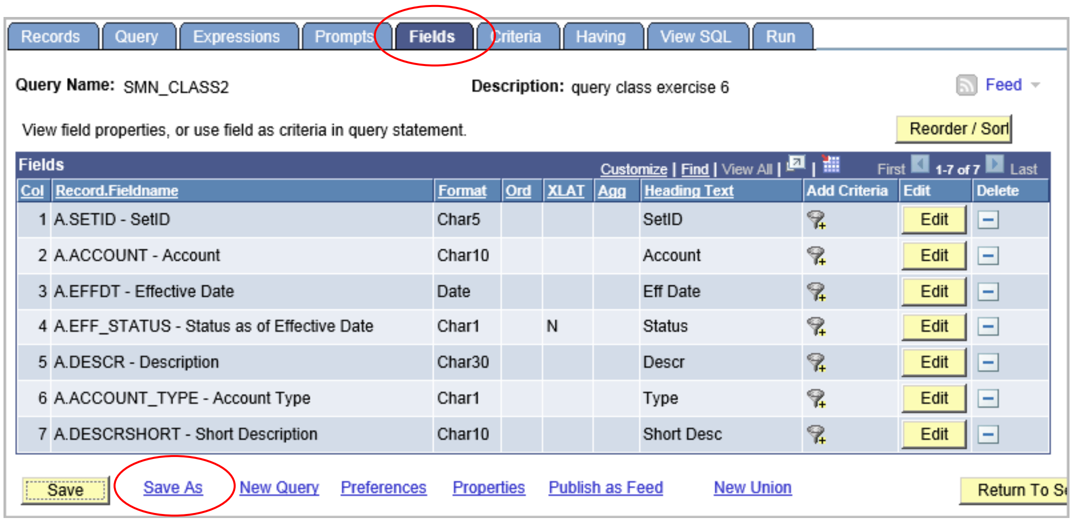


5. Click **OK**.

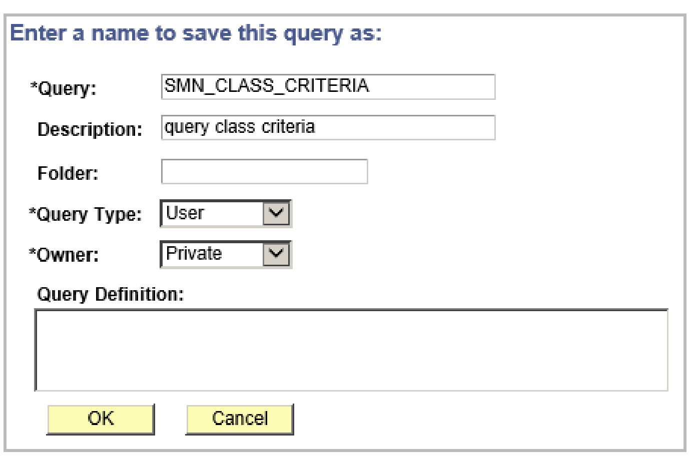
6. Click the **Run** tab.
   Your results should look similar to this:



7. Click the **Fields** tab.
8. Click the **Save As** link.

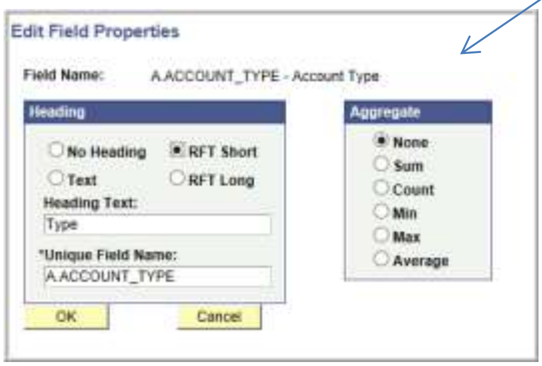


9. In the **Query** field, type: **`xxx_class_criteria`** (where **xxx** represent your initials).
10. In the Description field, type: **`query class criteria`**
11. Click **OK**.



Additional Information: Comparison between functionality of **Edit buttons** on Fields and Criteria tabs

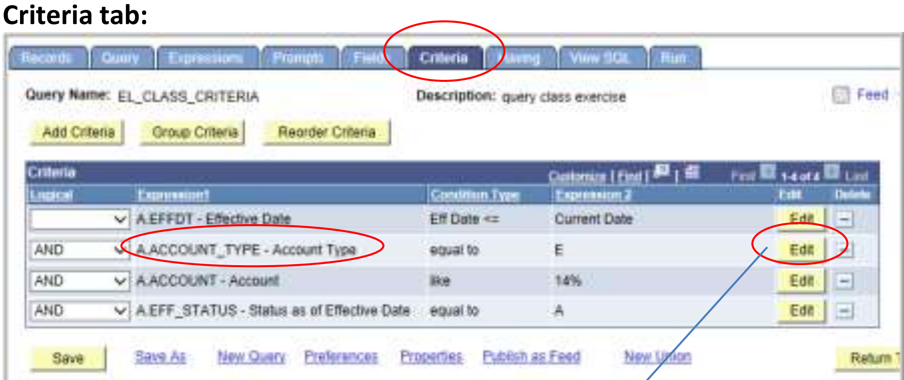
Fields tab:

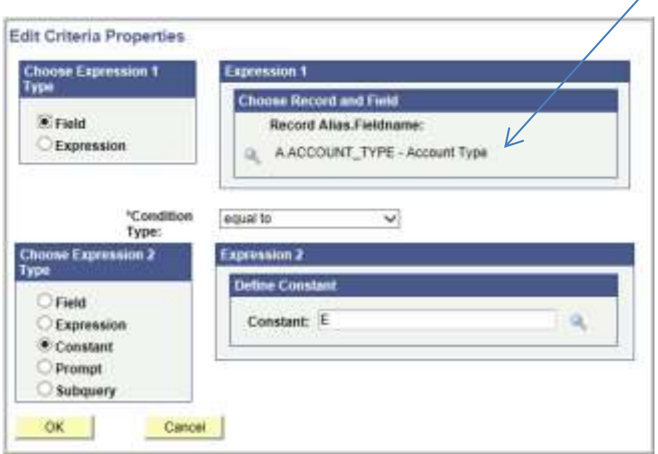


The **Edit button** in the Fields tab allows you to change the *properties* of field.

- **Aggregate** is only used with fields whose format is a number. **None** is used for all other formats.
- **Heading** is used to change column heading in your Run results.

Criteria tab:





The **Edit button** in the Criteria tab allows you to change the *criteria properties* of field.

--End of Exercise--