# Data Export User Guide



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## **Data Export**

Creating a Simple Data Export

🛇 nancys - System>Data Export>Data Export Source														
System CRM Sales Inventory Manufacturing Cost	ting	Purchasing /	Account	ing	Info									
DataSource		Dat	ta Source	,				User	Defined		1		Query	1
AR As Of Aging														
AR As Of Aging Summary		Company Co	ide C	Compa	any N	lame					_			
Backlog		ABWL	1	nfo-Pi	ower	Interna	ational - L	.ean Mfg	ł					
Booking		*Data Source	9						Act	ive				
Customer		Inventory QC	Inventory OOH								Und	late Coli	umns	
GLActivity											<u>o</u> pa		annio	
GLBalance		Description												
GLBudget		Inventory QC	OH and	Costs	8									
GLHIStory		Formatted				Calend	dar Type	Selectio	n					
Inventory						×								
		Division Crite	ria			Calenc	lar Tyne	Criteria						
Invoices							Jul Type	ontena						
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OnenSOforOrderDate		Warehouse Criteria				Default Calendar Type								
Purchase Orders								1	*					
Sales		Schedule Typ	pe Crite	ria		Compa	arative D	ate Rang	je					
Shippers														
StockValuationComparison		Mfa Item Tvp	e Criter	ia		Custor	mer Codi	e Criteria						
StockValuationComparisonC2O														
Vendor							<u> </u>	<u> </u>	·					
		Item Family (	Criteria			Master	r Custon	her Code	Unteria					
		Custom Stor	ed Proc	edure	1					_				
		Query Data S	Source											
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To begin creating a Data Export, open the Data Export Source maintenance function, System > Data Export > Data Export Source.

Select an existing Data Export by clicking on the desired export displayed in the grid.

To create a new Data Export, click the **Add New** button.

Enter a unique code for identifying the Data Export in the Data Source field.

Enter a more detailed description of the Data Export in the Description field.

Click the Save button and select the User Defined Tab.

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) nancy Svotom	s - Syste	m>Data	Export>Data	Export Source	Conting	Burchaoing	Account	ation	Info					
aystern	CRIM	Jales	inventory	Manufacturing	costing	Functionality	Accour	iung	11110					
DataS	ource						Data Sourc	e		Ĭ	User Defined		Query	1
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AR A	of Agin	g Summ	ary			Company (	Code	Comp	any Nan	ne				
Backl	og					ABWL		Info-F	ower Int	ernationa	l - Lean Mfg			
Booki	ng					*Data Sour	re							
Custo	mer					In conton u								
GLAc	tivity					Inventory	301							
GLBa	ance					Description	n –							
GLBu	dget					Inventory (	QOH and	d Cost	ts					
GLHis	tory					Label 1			Т	me 1	Size 1	RJZ 1		
Invent	ory									-pc i	0	1.02.1		
Invent	ory QOH					Label D				~	0	DIZ 2		
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						2006			rieset			JUSE		
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The User Defined tab, allows you to define 9 user inputs that can be used for selection and retrieval logic in your query.

In addition to the 9 user inputs, there are standard variables that can be used for selection:

@CompanyCode char(4)
@UserCode char(11)

🕅 nancys - System>Data Export>Data Export Source									
System CRM Sales Inventory Manufacturing Cos	sting	Purchasing	Account	ting	Info				
DataSource		De	ata Source	•		1	User Defined	Ĭ	Query
AR As Of Aging									
AR As Of Aging Summary		Company Co	ode C	Compar	ny Nam	ne		Table Alias	
Backlog		ABWL	1	nfo-Po	wer Int	ernatior	nal - Lean Mfg		<u>R</u> eport
Booking		*Data Sourc	e				Table		
Customer		Inventory O	он						
CustomersByStateInput		Inventory G							
GLActivity		From/Join							
GLBalance									
GLBudget									
GLHistory									
Inventory							-		
Inventory QOH							~		
Invoices		Erom	loin		lano	l			~
Invoices GL Sales Posting			<u>9</u> 0m		<u>o</u> ne	J			>
MyersInvoices		CustomQue	ry						
OpenSalesOrder		Select							~
OpenSOforOrderDate		I.ItemCo	de,						
Purchase Orders		I.Itemper	script: •Code	ion,					
Sales		I.Standar	rdCost.	_					
SalesReport12Periods		sum (IL.Q	uantit	, yOnHa	nd) as	[QOH]	Ŋ,		
Shippers		sum(IL.Q	uantity	yOnHa	nd) *	I.St	andardCost [Ext Cost]		
StockValuationComparison		From Inve	entory	I		_			
StockValuationComparisonC2O		Join Inve	entoryl	Locat	10n I	.L mnon	Codo		
TexasCustomers		and L.It.	panyco: emCode	ue - = TL	.Item	mpany Code	coue		
Vendor		Where I.	Compan	yCode	= @C	ompan	yCode		
VendoritemsSold		and I.Act	tive =	1		-	-		
VendorPurchasesYTD		Group By	I.Iter	mCode	,I.It	emDes	cription, I.GLTableCod	e,I.Standa	rdCost
		Order By	I.Iter	mCode					
									~
		, 							
		Save	Delete	) LF	Reset		ear <u>P</u> rint Close		

The Query tab allows you to define your query statement.

Now that you have seen an overview of the Data Export source function let's create a simple data export.

Task: To identify all customers located in the state of Texas.

- 1) Click the **Add New** button.
- 2) \*Data Source: TexasCustomers.
- 3) Description: Customers in the State of Texas.
- 4) Click the **Save** button.
- 5) Click on the Query tab.

🔊 nancys - System>Data Export>Data Export Source									
System CRM Sales Inventory Manufacturing Co	osting	Purchasing	Accour	nting	Info				
DataSource AR As Of Aging		C	ata Souri	ce		[	User Defined	Í	Query
AR As Of Aging Summary		Company C	ode	Compa	any Nam	e		Table Alias	
Backlog		ABWL		Info-P	ower Inte	ernational - I	Lean Mfg	с	Report
Booking		*Data Caus					- T.U.		
Customer		Data Sour	se .						
GLActivity		TexasCus	tomers				Customer		
GLBalance		From/Join							
GLBudget							ColumniName		<b>^</b>
GLHistory							WebCode		99
Inventory							WebPassword		99
Inventory QOH							VieightUUiviCode		99
Invoices							VTDSalaa		99
Invoices GL Sales Posting		Erom	Loir		Dana		7 TDSales		99
MyersInvoices		<u> </u>	<u></u>		D <u>u</u> ne	ļ			33
OpenSOforOrderDate		CustomQue	ery						
Purchase Orders		SELECT o	.Custo	omerC	ode, c	.Customer	Name, c.Address1,	c.City,	<u>^</u>
Sales		c.StateC	ode, d	z.Zip	,				
Shippers									
StockValuationComparison									
StockValuationComparisonC2O									
TexasCustomers									
Vendor									
			_		_				~
		Save	Dele	te	Beset	Clear	Print Close		
		<u></u>	2010						
1									

Enter the table name from which you wish to retrieve data or click on the field heading <u>Table</u> to display a listing of tables. Find the Customer table and double click on it to retrieve the columns (fields).

Enter a Table Alias. The table alias is a shortcut to identify the table you are referencing. For example, the company code field is referenced in many tables you must explicitly identify which table to pull company code from. In our example, you would specify Customer.CompanyCode, Customer.Name, etc. The Table Alias lets us shortcut that to c.CompanyCode, c.CustomerName, etc. – Less typing.

Select the following fields from the list: Customer Code, Customer Name, Address 1, City, State Code, ZIP and Phone; by scrolling and finding each field and double clicking on the name or by entering them as discussed on the previous page. Notice as you click on each field it is added to the SELECT statement in the CustomQuery window with the Table Alias appended to the front.

🛇 nancys - System>Data Export>Data Export Source									
System CRM Sales Inventory Manufacturing	Costing	Purchasing	Accounting	Info					
DataSource		D	ata Source		I	User Defined	Í	Query	
AR As Of Aging									
AR As Of Aging Summary		Company C	ode Com	bany Nam	ne		Table Alias		
Backlog		ABWL	Info-	Power Int	ernational - L	.ean Mfg	c	<u>R</u> epo	rt
Booking		*Data Sourc	e			Table			
Customer		TexasCust	omers			Customer			_
GLActivity		From ( loin				Jeasterner			
GLBalance		PROM CHI				ColumnName			
GLBudget		r ROH Cus	comer c			PaymentTermsCor	le	99	
GLHistory						Phone		99	
Inventory						Phone2		99	
Inventory QUH						Phone3		99	_
Invoices					1	PriceCode		99	
Invoices GL Sales Posting		Erom	Join	D <u>o</u> ne		PricingClassCode		99	
Wyersinvoices		CustomOus			0	H			
OpenSotorOrderDate		customque	ay a				811		
Purchase Orders		C StateC	.Customer ode c 7i	loae, c n c Ph	one FROM	Name, c.Addressi, Customer c WHERE (	C.City, CommenyCo	de =	
Chippore		@Company	Code	p, c.r.	one riton	Cubconci e winite (	.companyee	Juc	
Stock/oluctionComparison									
Stock Valuation Comparison C20									
Texas Customers									
Vendor									
									100
									<u> </u>
		Save	Delete	Reset	<u>C</u> lear	Print Close			
			(						
2									

Once you have completed the field selection:

- 1) Click the **From** button.
- 2) Click the **Done** button.

This will add the FROM and WHERE clauses to the query. Notice that the WHERE clause added logical selection on CompanyCode. The @CompanyCode variable is always set to the current company into which you are logged in.

Now, we need to add the selection logic to find all customers within Texas. Add the following after @CompanyCode.

#### AND c.StateCode = 'TX'

Click the **Save** button.

ancys - System>D	ata Export>Data Export User		
stem CRM Sa	les Inventory Manufacturing Costing	Purchasing Accounting Info	
UserCode	DataSource 🔨		
jeffz	AR As Of Aging	Company Code Company Name	
jeffz	AR As Of Aging Summary	ABWL Info-Power International - Lean Mtg	
jeffz	Backlog	*User Code Allow User Modi	fications
jeffz	Booking	nangyo - Nangy Stoyong	
jeffz	Customer		
jeffz	GLActivity	*Data Source Active	
jeffz	GLBalance	TexasCustomers 🛛 🔽	
jeffz	GLBudget	Date Last Run Fiscal Begin Year Curr Yr YTD Beg Input 1	
jeffz	GLHistory	05/24/2010	
jeffz	Inventory	03/27/2010	
jeffz	Invoices	Records Exported Fiscal Begin Period Curr Yr YTD End Input 2	
jeffz	OpenSOforOrderDate	118	
jeffz	Purchase Orders	Division Code Fiscal End Year Prior Vr VTD Beg Input 3	
jeffz	Sales	Enterior Code Friday Friday Friday Friday Friday Friday	
jeffz	Shippers		
jeffz	StockValuationComparison	Warehouse Code Fiscal End Period Prior Yr YID End Input 4	
jeffz	Vendor		
michaels	Inventory QOH	Schedule Type Code Calendar Begin Date Curr Yr PTD Beg Input 5	
nancys	Inventory QOH		
reyna	StockValuationComparison		
zcb	AR As Of Aging	Mfg Item Type Code Calendar End Date Curr Yr PID End Input 6	
zcb	AR As Of Aging Summary		
zcb	Backlog	Item Family Code Customer Code Prior Yr PTD Beg Input 7	
zcb	Booking	, i indiana i i i i i i i i i i i i i i i i i i	
zcb	Customer		
zcb	GLActivity	Calendar Type Code Master Cust. Code Prior Yr YTD End Input 8	
zcb	GLBalance		
zcb	GLBudget	Excel Workbook Input 9	
zcb	Inventory		
zcb	Inventory QOH		
zcb	Invoices		
zcb	Invoices GL Sales Posting 🔍	Add Naw Parks Dalats Class Datask Dist	
<	>		

The next step is to identify the users that should be able to run your query.

Open the Data Export User maintenance window, System > Data Export > Data Export User.

Click the **Add New** button to create a new record.

Click on the **Drop Down** for User Code and select the user, for today's purposes select yourself, to which you wish to grant access. To a drop down listing is available for every field that has a down arrow at the end of the field. To access the drop down, click on the down arrow.

Click on the **Drop Down** for Data Source and select the 'TexasCustomers' query.

Click the **Save** button to save your information.

For this example, don't worry about the remaining fields.

Info-Power International, Inc. 3345 Silverstone • Plano, Texas 75023 (972) 424-4447 You are now ready to run your query. From the Info menu select Data Export 2003 Plus, Info > Data Export -2003 Plus.

() nancy	s - Info>I	)ata Exp	ort - 2003 P	lus									
System	CRM	Sales	Inventory	Manufacturing	Costing	Purchasing	Accounting	Info					
Data	Source:												
Texa	sCustom	ers - Cus	tomers in th	e State of Texas		~							
			Records	Read Save F	ilename Pat	h							
	EX	PORT		10 C:\tem	p\nancys_A	BWL_TexasCu	ustomers_2011	0203_110352.xls		CLOSE			
Company	: ABWL -	Info-Pov	ver Internatio	nal - Lean Mfg			Status: Ready		2.12	DEVSQL2008	ABW	nancys	NSXP

Using the Drop Down selection box, select your query.

Click the **Export** button.

The query will run and moments later Excel will start and display your results.

🛯 Microsoft Excel -	nancys_ABWL_TexasCustomers_20110203_111145.xls		- 7 🛛
: 🖭 Eile Edit View	Insert Format Tools Data Window Help Adobe PDF	T	/pe a question for help 🛛 🚽 🖪 🗙
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	1 📅 🏷 🕅 🖳 🕅 🕅 Reply with Changes End Review		
	Construction Conduction		
		ĉ	D -
1 CustomerCode	CustomerName	Address1	City
2 000200	3 G P C Inc	3001 Quebec St. Ste 109	Dallas
3 000600	Crest Industries	1021 Crest Ave.	Plano
4 003300	Church Contractors, Inc.	123 West Main	McKinney
5 004500	First United Methodist Church - Allen, TX	123 West Main	Allen
6 004600	Freewill Baptist Church - Plano, TX	456 South Elm	Plano
7 006400	LOCKHEED FT. WORTH COMPANY	LOCKHEED BLVD.	FORT WORTH
8 010400	Stevens Bicycle Shop	3315 Silverstone	Plano
9 011500	Wallace Cable Assembly Vender Industrian	3315 Silverstone	Plano
10 012000	Xander Industries	2000 Industrial Blod	Plano
12	Aander Industries - Warehouse		Danas
13			
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31			
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Ready			NUM

Your results should look similar to the display shown above.

You have just created a simple Data Export!

) nancys - System>Data Export>Data Export Source		
System CRM Sales Inventory Manufacturing Cos	ting	g Purchasing Accounting Info
	_	Y Y
DataSource		Data Source User Defined Query
AR As Of Aging		
AR As Of Aging Summary		Company Code Company Name
Backlog		ABWL Info-Power International - Lean Mfg
Booking		*Data Source Active
Customer		VendorPurchasesYTD
GLActivity		
GLBalance		Description
GLBudget		Vendor Purchases YTD
GLHISTORY		Formatted Calendar Type Selection
Inventory		
Inventory QUH		Division Criteria
Invoices		
Invoices GL Sales Posting		
Myersinvoices		Warehouse Criteria Default Calendar Type
Opensolororderbate		
Policinase Orders		Schedule Type Criteria Comparative Date Range
Shippore		
Stock\/aluationComparison		Mfr. Itom Tuna Critaria Custamar Cada Critaria
StockValuationComparisonC20		
TexasCustomers		
Vendor		Item Family Criteria Master Customer Code Criteria
VendorPurchasesVTD		
		Custom Stored Procedure
		Query Data Source
		Add New Save Delete Clear Refresh Print Close
,		

### Creating a Data Export with Totals

For this exercise we are going to create a listing by vendor that will show total purchases year to date for each vendor and total purchases for the query.

Click the **Add New** button.

Enter VendorPurchasesYTD as the Data Source.

Enter Vendor Purchases YTD as the Description.

Click the **Save** button.

#### Move to the Query tab.

🔊 nancys - System>Data Export>Data Export Source		
System CRM Sales Inventory Manufacturing Costing	ng Purchasing Accounting Info	
DataSource	Data Source User Defined Query	
AR As Of Aging		
AR As Of Aging Summary	Company Code Company Name Table Alias	
Backlog	ABWL Info-Power International - Lean Mfg v <b>B</b> ep	port
Booking	*Data Source Table	
Customer	Vendor Vendor	
GLActivity		
GLBalance	From/Join	
GLBudget	FROM Vendor v VendorhTraneitWarehouseCode 9	a 🔛
GLHistory	VendorName	a l
Inventory	VendorNates 90	a l
Inventory QOH	VendorTaxCode	ğ
Invoices	VendorTyneCode 90	9
Invoices GL Sales Posting	From Join Done YTDPurchases 99	9 📑
MyersInvoices		• <b>1</b>
OpenSOtorOrderDate		
Purchase Orders	SELECT v.VendorCode, v.Address1, v.City, v.StateCode,	
Sales	V. HDFulchases FROM Vendor V where V. companycode - @companycode	
Shippers Charly Alustica Companies		
Stock Valuation Comparison		
ToyacCustamore		
Vender		
VendorBurchaseeVTD		
VendorFulchases (TD		
		-
	<u>Save</u> <u>D</u> elete Reset <u>C</u> lear <u>P</u> rint Close	

Enter v for Table Alias.

Find the Vendor table by clicking on the <u>Table</u> field heading and scrolling down until you find it. Then select it by double clicking on it to retrieve it back to the form.

Next, select the following fields: VendorCode, Address 1, City, StateCode and YTDPurchases.

Finally, click the **From** button, the **Done** button and the **Save** button.

Next, move back to the Data Source tab and click the Update Columns button. This process will attempt to execute your query and if successful will update the Data Export Source Column table with the columns from your Data Export. If your query cannot be executed you will receive an error message and you must correct the query statement.

stem CRM Sales I	nventory Manufacturing	Costing	Purchasing	Account	ting	Info		
)ataSource	ColumnName	<u>^</u>	Compony C	odo (	`omn	any Name		
StockValuationCompariso	nC QtyOnHand		Company C		20111pa			
StockValuationCompariso	nC UOMCode	_	ABWL		Into-P	ower International - Lean Mfg		
exasCustomers	Address1		*Data Sourc	e				
exasCustomers	City	_	VendorPur	chases'	/TD		Í .	
exasCustomers	CustomerCode		*Oshuma bis					
exasCustomers	CustomerName		Column Na	me				
exasCustomers	Phone		YIDPurch	ises				
exasCustomers	StateCode		Excel Head	ng				
exasCustomers	Zip			-				
/endor	Address1							
/endor	Address2		Width In Ex	cel				
/endor	APBalance		15	_				
/endor	APBeyondAmount		Column Typ	е				
/endor	APPeriod1Amount		N - Numeri	c	~			
/endor	APPeriod2Amount			-				
/endor	APPeriod3Amount		Numeric Pr	cision				
/endor	APPeriod4Amount		2					
/endor	City		Excel Colur	an Numk	or			
/endor	CompanyCode			mnum	Jei			
/endor	CountryCode		U	_				
/endor	CurrencyCode		Exclude Err	m Exce	1			
/endor	Email							
/endor	Fax							
/endor	Phone		Total Colum	n In Exc	el			
/endor	StateCode		V					
/endor	VendorCode							
/endor	VendorName							
/endor	Zip							
/endorPurchasesYTD	Address1							
/endorPurchasesYTD	City							
/endorPurchasesYTD	StateCode		C					
/endorPurchasesYTD	VendorCode		Add New	Sav	e	Delete Clear Refresh	Derint Close	

To flag a column to be totaled open the Data Export Source Column maintenance screen, System > Data Export > Data Export Source Column.

Scroll down until your Data Export is displayed, or you can quickly position to your Data Export by clicking in the grid and typing the name, or DataSource, of your Data Export.

Find and click on the column to be totaled. Place a check in the Total Column in Excel check box.

The remaining fields on the screen are determined by the Update Columns process.

Click the **Save** button.

nancys -	Syste	m>Data	Export >Data	Export User								
System	CRM	Sales	Inventory	Manufacturing	Costing	Purchasing	Accountin	ng Inf	5			
HearCod			DeteS	uroo	•							
ioffra	e			Of Aging		Company (	Code Co	mpany	Name			
jenz ie#e			AR AS	Of Aging Commen	_	AB\d/I	In	fo-Powe	r International - Le	ean Mfg		
jenz :-#-			AR AS	OI Aging Summai	У	no ne		1011 0111		Janning		
jenz i effe			Dackio	g		*User Code	э			/	Allow User Modifications	
jenz :-#-			DUUKIN	9		nancys - N	Nancy Stev	ens		~		
jenz :- «-			Custon	ner		*Doto Sou	~~~				h - 41	
jeπz · «			GLACI	vity	_	Data Soul				/	ACTIVE	
jeπz			GLBaia	ance	_	VendorPl	ircnases y i	ID		×		
jeπz : «			GLBUG	get	_	Date Last	Run	Fis	cal Begin Year	Curr Yr YTD B	eg Input 1	
jeπz			GLHIST	ory	_	09/23/200	3					
jettz . «			Invento	ry	_	Records E	vnorted	Fie	cal Begin Period	Curr Vr VTD E	nd Innut 2	
jeπz			Invoice	s or o i p i	_		xponed	113	car beginn enou			
jeffz			OpenS	UtorUrderDate		U						
jeffz			Purcha	ise Urders		Division Co	de	Fis	cal End Year	Prior Yr YTD E	leg Input 3	
jettz			Sales		_							
jeffz			Shippe	rs	_	Warahaua	Codo	Fis	cal End Period	Prior Yr YTD E	nd Input 4	
jettz			Stock	/aluationComparis	on	Waterious	e Coue					
jeffz			Vendor	, 								
michaels			Invento	ry QOH	_	Schedule 1	Fype Code	Ca	endar Begin Date	Curr Yr PTD B	eg Input 5	
nancys			Invento	ry QOH	_							
nancys			Texas(	Customers	_	Mfg Itom T	vno Codo	Ca	ender End Date	Curr Yr PTD E	nd Innut 6	
nancys			Vendo	PurchasesYTD		Ning item 1	ype code		cildar Elia Date			
reyna			Stock\	/aluationComparis	on							
zcb			AR As	Of Aging	_	ltem Famil	y Code	Cu	stomer Code	Prior Yr PTD E	leg Input 7	
zcb			AR As	Of Aging Summa	у							
zcb			Backlo	g		ColordanT					L lawset 0	
zcb			Bookin	g	_	Calendar I	ype Code	Ma	ster Cust. Code	Prior Yr YIDE	nd input o	
zcb			Custon	ner	_	F - Fiscal		~				
zcb			GLActi	vity		Excel Wor	kbook				Input 9	
zcb			GLBala	ance								
zcb			GLBud	get								
zcb			Invento	ry								
zcb			Invento	ry QOH	~	Add New	Save		lete Clear	Befresh I	Print Close	
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Grant access to the users that will be able to execute this query.

ଚ	nancys	- Info>l	)ata Exp	ort - 2003 F	Plus					
S	/stem	CRM	Sales	Inventory	Manufacturing	Costing	Purchasing	Accounting	Info	
	Data Si	ource:								
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	luurate				1.0					
	Texas(	Custom	ers - Cus	tomers in th	e State of Texas					
	Vendo	rPurcha	sesYTD	- Vendor Pu	rchases YTD					
				Records	s Read Save Fil	ename Pat	h			
		EX	PORT						CLOSE	
Co	npany: /	ABWL	Info-Pov	ver Internatio	onal - Lean Mfg			Status: Ready	y 2.12 DEVSQL2008 ABW nancys N	SXP 🔡

Execute your Data Export by selecting the Data Source and clicking the **Export** button.

Only those Data Exports that you have permission to execute will be displayed in the Data Source drop down selection.

📧 Microsoft Excel - r	nancys_ABWL_VendorPurchasesYTD_20110203_160319.	xls		
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73 73 78 -				
A1 -	∱ VendorCode			
A	В	С	D	E F 🗖
1 VendorCode	Address1	City	StateCode Y	TDPurchases 🔒
2 000100	257 Riley Street	Sydney		0.00
3 000200	620 Sherwood Park South	Arlington Height	CA	0.00
4 000300	501 Washington	Chicago	IL .	0.00
5 000400	P.O. Box 9336	Chicago	IL .	0.00
6 000500	1702 East Crestview Drive	Chicago	L	0.00
7 000600	761 McMillan St	Toronto	ON	500.00
8 000700	10630 Cherry Lane	Vancouver	BC	0.00
9 000800	5982 Interstate	St. Louis	MO	0.00
10 000900	18 Coventry Ave.	Auckland		0.00
11 001000	346 E Seymour	Victoria	BC	0.00
12 001100	437 45 St	St. John	NB	0.00
13 001200	1098 Western Drive	Ames	IA	0.00
14 001300	P.O. Box 5990	Chicago	L	0.00
15 001400	P.O. Box 650644	Dallas	TX	0.00
16 001500	1487 Orchard Lane	Chicago	L	0.00
17 001600	P.O. Box 5647	Chicago	L	0.00
18 001/00	1480 Miner Ave SW	Chicago	IL	0.00
19 001900	14369 West Pennsylvania Ave.	Waterville	ME	0.00
20 002000	843 12 London Ave.	Montreal		0.00
21 002100	532 West Main	Chicago		0.00
22 002200	1008 Hirsten Road	Houston	IX	0.00
23 002300	bbU1 Lexington Ave East	Chicago		0.00
24 002400	P.U. Box 11330	Wilmington	DE	0.00
25 002500	12bU Lakeshore Dr.	loronto	UN	0.00
26 002600	City Hall, Dept. 1	Chicago	IL AD	0.00
27 002700	1932 145th St West	Laigary	AB	1427.32
28 002800	I IUZU West Broadwalk	INEW TOPK	NT	0.00
29 002900	P.U. B0X 15156	VVIImington	UE Vece	0.00
30 003000	East pour Square	Seattle	WA NI	0.00
31 003100	100 Main	INEWARK Diana	INJ TV	0.00
H + + H \nancys A	BWL_VendorPurchasesYTD_/	<		
Ready				NUM

The results of your Data Export should be similar to the above.

Notice in the above example, the Vendor's Name was not included and the query is showing several vendors where the YTDPurchases column is zero.

This brings us to modifying a Data Export.

#### **Data Export Modification**

🔊 nancys - System>Data Export>Data Export Source					
System CRM Sales Inventory Manufacturing	Costing	Purchasing Accoun	ting Info		
DataSource		Data Source	9	User Defined	Query
AR As Of Aging AR As Of Aging Summary Backlog Booking Customer GLActivity GLBalance GLBudget GLHistory Inventory Inventory Inventory QOH Invoices GL Sales Posting MyersInvoices OpenSOforOrderDate Purchase Orders Sales Sales Shippers StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuationComparison StockValuation StockValuationComparison StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockValuation StockVal		Company Code ABWL *Data Source VendorPurchases* Description Vendor Purchases Formatted Division Criteria Division Criteria Warehouse Criteria Schedule Type Crite Schedule Type Crite Item Family Criteria Custom Stored Proc Query Data Source	Company Nar Info-Power In TD TD C C C C C C C C C C C C C C C C C	me termational - Lean Mfg Act Calendar Type Selection Calendar Type Criteria Calendar Type Comparative Date Range Calear Code Criteria Calear Code Criteria	ve Update Columns

Open the Data Export Source maintenance screen, System > Data Export > Data Export Source.

We want to add the vendor's name and exclude vendors with an YTD Purchase amount not equal to zero.

Select your Data Export and move to the Query tab.

🛇 nancys - System>Data Export>Data Export Source		
System CRM Sales Inventory Manufacturing Costing	g Purchasing Accounting Info	
DataSource	Data Source User Defined Query	
AR As Of Aging		
AR As Of Aging Summary	Company Code Company Name Table Alias	
Backlog	ABWL Info-Power International - Lean Mfg v Repo	ort
Booking	*Data Source Table	
Customer	Vender Vender	_
GLActivity		
GLBalance	From/Join	
GLBudget	Vender& DTrade Assessmt Cade	
GLHistory	VenderClassCode 99	
Inventory	VendorClassCode 99	
Inventory QOH	VenderleTransitWarehouseCode 99	
Invoices	VenderName QQ	
Invoices GL Sales Posting	From Join Done VendorNates 99	
MyersInvoices		
OpenSOforOrderDate	CustomQuery	
Purchase Orders	SELECT v.VendorCode, v.VendorName, v.Address1, v.City, v.StateCode,	~
Sales	V. HDPurchases FROM vendor V WHERE V. companycode = @companycode	
Shippers		
StockValuationComparison		
StockValuationComparisonC20		
Vender		
VenderBurchasseVTD		
VendorPurchases YTD		
		~
	Save Delete Reset Clear Print Close	
1		

Position your cursor at the point where you would like to insert the vendor's name.

Caution: When you first click in the CustomQuery section you are in replacement mode. You must double click to be in insert mode. If you happen to make a mistake just close the maintenance screen without saving.

Enter **v.VendorName**, to insert the vendor's name.

To add the logical check for YTDPurchases <> 0, position the cursor to the end of the query statement and enter **and v.YTDPurchases** <> 0 into the WHERE clause.

Click the **Save** button to save your changes.

Move back to the Data Source tab and click the **Update Columns** button. Remember this will test your query statement and you will receive a warning message if your query cannot be executed.

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1	💕 🔒 🖂 🛍	🗈 🖺 •   🤊 •   🧶 Σ • Å	🖡 🛄 100% 📼 🕢 🦉 Arial	• 10 • B I U 🗮	E 🗏 🔤   \$ %   🛱   🖽 + 🌭 + 🛓 - 🍟
	1 21 21 22 70 1	9 17 5 18 <b>4</b> 12 19 Re	ply with Changes End Review		
· •		& VendorCode			
	A	B	C	D	F F <del>7</del>
1	VendorCode	VendorName	Address1	City	StateCode YTDPurchases
2	000600	Business Equipment Center	761 McMillan St	Toronto	ON 500.00
3	002700	Continental Connectors	1932 145th St West	Calgary	AB 1427.32
4					1927.32
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When executed your query should now have the vendor's name and only show vendors where the YTD Purchases amount is not equal to zero.

#### **Creating a Query with User Input for Selection**

In the previous two examples, we have developed queries where the selection criteria was hard-coded, only show customers from Texas or only show vendors with a non-zero YTD Purchases. To allow more flexibility you would like to create user inputs to be used as selection criteria, i.e., allow the user to enter the State Code.

🔊 nancys - System>Data Export>Data Export Source							
System CRM Sales Inventory Manufacturing	Costing	Purchasing Accounting	Info				
DataSource		Data Source	Í	User Defined		Quer	/ 1
AR As Of Aging AR As Of Aging Summary Backlog Booking Customer		Company Code Comp ABWL Info-F *Data Source VendorPurchasesYTD	any Name <sup>2</sup> ower International -	Lean Mfg			
GLBalance GLBudget		Description Vendor Purchases YTD					
GLHistory Inventory		Label 1	Туре 1	Size 1 F	RJZ 1		
Inventory QOH Invoices Invoices GL Sales Posting		Label 2	Туре 2	Size 2 F	RJZ 2		
MyersInvoices OpenSOforOrderDate		Label 3	Туре З	Size 3 F	RJZ 3		
Purchase Orders Sales		Label 4	Туре 4	Size 4 F	RJZ 4		
Shippers StockValuationComparison StockValuationComparisonC2O		Label 5	Туре 5	Size 5 F	RJZ 5		
TexasCustomers Vendor		Label 6	Туре б	Size 6 F	RJZ 6		
VendorPurchasesYTD		Label 7	Туре 7	Size 7 F	RJZ 7		
		Label 8	Туре 8	Size 8 F	RJZ 8		
		Label 9	Туре 9	Size 9 F	RJZ 9		
		Save Delete	Reset <u>C</u> lear	Print Clos	:e		

You will accomplish this using the User Defined tab.

The User Defined tab has 9 user identified inputs that are available to use for selection in a Data Export.

Using one of the earlier examples, you may want to create a customer listing and enter the StateCode to be used for selection.

The Label 1 through Label 9 fields will contain the prompt to be displayed to the user when the Data Export is executed. For example, you may choose one of the following to ask for state: Enter State Code, State Code, or State.

Info-Power International, Inc. 3345 Silverstone • Plano, Texas 75023 (972) 424-4447 The Type 1 through Type 9 fields indicates the nature of the data to be input it can contain one of the following values:

C – Char or Character N – Numeric I – Integer D – Date B – Boolean (True or False)

The fields Size 1 through Size 9 indicate the number of characters to be allowed for input.

The fields RJZ 1 through RJZ 9 indicate that the data input is to be right justified and zero filled.

Continuing with the StateCode example, the fields would be set as follows:

Label 1 = Enter State Code Type 1 = C Size 1 = 2 RJZ 1 = remain unchecked

To reference an input value in the selection clause or WHERE statement, you will use the following:

@Input1
@Input2
@Input3
@Input4
@Input5
@Input6
@Input7
@Input8
@Input9

nancys - System>D	ata Export>Data	Export Source									_	
ystem CRM Sa	ales Inventory	Manufacturing	Costing	Purchasing	Accountir	ig Info	)					
DataSource				(	Data Source		Ĩ	User	Defined	Ĩ	Query	
AR AS OF Aging AR As Of Aging Su	mmary			Company (	Code Cr	mnany N	Jame					
Backlog	in in in a ry			ABW	In In	fo-Powe	r Internatio	anal - Lean Mfg	1	7		
Booking				7.0772		10 T OWC	rinternetit	shar Ecannig				
Customer				*Data Sour	ce				Active			
CustomersByState	Input			Customers	ByStateIn	out				<u>U</u> pdate	Columns	
GLActivity				Description	I							
GLBalance				Customer	Listina							
GLBudget				Formatted			Calandar	Tune Celection				
GLHistory				Formatted			Calendal	r Type Selection	n			
Inventory									<b>*</b>			
Inventory QOH				Division Cri	teria		Calenda	r Type Criteria				
nvoices												
nvoices GL Sales I	Posting			Warehouse	e Criteria		Default (	Calendar Type				
MyersInvoices									~			
OpenSOforOrderDa	te											
Purchase Orders				Schedule I	ype Criteri	a	Compara	ative Date Rang	e			
Sales												
Shippers				Mfg Item T	ype Criteria		Custome	er Code Criteria				
StockValuationCon	nparison											
StockValuationCon	nparisonC2O		_	Item Family	v Criteria		Master 0	Customer Code	Criteria			
lexasCustomers			_		,							
/endor	-		_	Custom St	ored Proce	dure						
√endorPurchasesY	IU			Custom St		aare						
				Query Data	a Source							
				Add New	Save	Del	ete C	lear Refre	sh Print	Close		

Create a new Data Export, CustomersByStateInput.

Enter **Customer Listing** for the Data Export description.

Click the **Save** button and move to the User Defined tab.

System CRM	Sales Ir	iventory	Manufacturing	Costing	g Purchasing	a Accou	inting	Info						
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DataSource				_		Data Sou	rce			User Defined			Query	
AR As Uf Aging	0				C	Cada	Comr	onu Nomo						
AR AS UT Aging : Realities	Summary				Company	l code	Lut- I	any Name		Laan Mer				
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Duoking					*Data So	urce								
CustomereBySta	tolpput				Custom	ersByStat	elnput							
GLActivity	itemput				Descripti	on								
GLBalance					Custom	on selicting					_			
GLBudget					Custom	ercisung								
GLEistory					Label 1			Туре	91	Size 1	RJZ 1			
Inventory					Enter St	ate Code		C -	Char	▶ 2				
Inventory QOH					Label 2			Туре	2	Size 2	RJZ 2			
Invoices										✓ 0				
Invoices GL Sale	s Postina				Label 3			Type	3	Size 3	RJZ 3			
MyersInvoices										V 0				
OpenSOforOrder	Date				Label 4			Tunc	. 4	Size 4	D 17 /			
Purchase Orders	:				Euberty			туре	: 4	01204	1.02.4			
Sales														
Shippers					Label 5			Туре	95	Size 5	RJZ 5			
StockValuationC	omparison									≥ 0				
StockValuationC	omparisor	C2O			Label 6			Туре	96	Size 6	RJZ 6			
TexasCustomers	:									✓ 0				
Vendor					Label 7			Type	7	Size 7	RJZ 7			
VendorPurchase	sYTD							.,,,,,		V 0				
					Label 8			Tune		Size 8	D17.9			
					Labero			туре	.0		N02 0			
					Label 9			Туре	9	Size 9	RJZ 9			
										V U				
					Cours	Dole		Peset ]	Clear	Drint	Nece			

Enter Enter State Code for Label 1.

Enter C for Type 1.

Enter **2** for Size 1.

Click the **Save** button and move to the Query tab.

Select the same fields as we did in the first exercise, CustomerCode, CustomerName, Address1, City, StateCode, Zip and Phone.

In the first example, we selected only customers that were in Texas. In this example, we want to change the selection criteria to be the value input by the user. To do this replace the = '**TX**' with = @**Input1**.

Click the **Save** button and move to the Data Source tab.

Click the Update Columns button to check your query statement for errors.

Assign the new Data Export to the users that will be running the query.

Execute the Data Export, Info > Data Export – 2003 Plus.

S nancys	- Info>D	ata Exp	ort - 2003 P	Plus						(	
System	CRM	Sales	Inventory	Manufacturing	Costing	Purchasing	Accounting	Info			
Data Si	ource:										
Custor	nersByS	StateInpu	ut - Custome	r Listing		~					
Enter S	State Co	de									
			Boostda	Dood Sove File	nomo Dot	h					
	EX	PORT	Records	0 C:\temp\	nancys_Al	" BWL_Custome	ersByStateInpu	ıt	CLOSE		
Company: /	ABWL -	Info-Pov	ver Internatio	nal - Lean Mfg			Status: Ready	2.12	2 DEVSQL2008	ABW nancys	NSXP .:

Notice the screen changes after selecting the Data Export.

Enter a valid 2 digit state code and click the **Export** button.

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3	001500		Astor	Suites	99	4 West	Alaska	Garv	apono	- í	N	46401-3	455	219-778-	9067						
4	001700		Baker	's Empori	um 89	1 Unive	rsity Ave	Fort V	Vavne	Í	N	46802-39	918	219-491-	2930						
5	006800		Manc	hester Su	ites 86	7 W O	ange Av	Lafave	ette	i	N	47905-58	355	800-668-	3209						
6	007300		Mid-C	ity Hospit	al 89	07 N. F	Pioneer F	Gary		1	N	46401-42	211	219-788-	0075						
7	007400		Midlar	nd Constri	ucti 50	08 Fras	ser Ave N	Misĥa	waka	1	N	46544		219-646-	9703						
8	007700		Nation	hal Shoppi	ing Ap	ple Gro	ove Squa	rIndian	apolis	1	N	46205-23	393	317-788-	2077						
9	007900		North	College	Bu	isiness	Office	Fort V	Vayne	1	N	46802-33	313	219-490-	2700						
10	008400		Octag	jon Marke	ting 10	99 Red	wood Tra	a Indian	apolis		N	46206-10	199	317-776-	1807						
11	011300		Visior	n Inc.	21	0 S.W.	49 Ave	Indian	apolis	I	N	46206-12	222	317-779-	5211						
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	( ) ⊢ H\\na	ncys_/	ABWL_0	Customer	sBySt	ateInp	/					<			1111					>	
Rea	dv																	CAPS	NUM		

Your Data Export should return something similar to the above.

ABW Data Export										
♪	No data was returned by the Query!									
	ОК									

If you query was unable to return any data, you will see a box displayed stating that No data was returned by the Query!

#### Using Sub-Queries and Joins within a Data Export

There will be times when you need to pull data from multiple tables. Maybe you need to create an open sales order query that shows available inventory, you would need to link the SODetail table and the InventoryLocations table and show the total quantity on-hand from all warehouse locations.

select H.CustomerCode, H.BillToName, H.CustomerPONumber, H.SONumber, D.LineNumber, D.ItemCode,

D.ItemDescription,I.ComponentCode as 'Make/Buy', I.SchedulingWorkstationCode as WorkCell,H.EntryDate, D.ScheduledShipDate, D.OriginalOrderQuantity,

D.ShippedQuantity,

D.OrderQuantity as OpenOrderQty,

(select sum(QuantityOnHand) from InventoryLocation where

CompanyCode=@CompanyCode

and ItemCode=D.ItemCode and WarehouseCode in (select WarehouseCode from Warehouse

where CompanyCode=@CompanyCode and ExcludeFromQuantityOnHand=0)) as QtyOnHand

From SODetail D Join SOHeader H on H.CompanyCode = D.CompanyCode and H.SONumber = D.SONumber join Inventory I on I.CompanyCode = D.CompanyCode

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and I.ItemCode = D.ItemCode where D.CompanyCode = @CompanyCode and H.Cancelled=0 and D.OrderQuantity > 0 and H.OnCreditHold = 0

The above example is a little more complicated then the earlier examples.

There two points of interest in this example:

Use of a Sub-query:

(select sum(QuantityOnHand) from InventoryLocation where CompanyCode=@CompanyCode and ItemCode=D.ItemCode and WarehouseCode in (select WarehouseCode from Warehouse where CompanyCode=@CompanyCode and ExcludeFromQuantityOnHand=0)) as QtyOnHand

Use of a Join:

Join SOHeader H on H.CompanyCode = D.CompanyCode and H.SONumber = D.SONumber

#### **Sub-Queries:**

Sub-queries let you take the result of one query and use it as information in the second query.

#### Joins:

Joins let you retrieve information from multiple tables to use in your query. As there are several types of joins you may want to study them, as this document will not specifically discuss each type.

Example Using Group By and Order By

select T.ItemCode, I.ItemDescription, sum(T.QuantityOnHandChange \* -1) AS 'QtySold'

from InventoryTransactions T, Inventory I

where T.CompanyCode = @CompanyCode and I.CompanyCode = T.CompanyCode and I.ItemCode = T.ItemCode and T.TransactionTypeCode = '8' and I.PrimaryVendorCode = @Input1 and (T.TransactionDate >= @Input2 and T.TransactionDate <= @Input3 )</pre>

Group By T.ItemCode, I.ItemDescription

Order By T.ItemCode

The above example uses the SQL query commands Group By and Order By.

Info-Power International, Inc. 3345 Silverstone • Plano, Texas 75023 (972) 424-4447 The Group By command indicates logical breaks in a query where subtotals can be generated.

The Order By command is used to indicate how your data should be sorted in your query. In the above example your data will be printed in ItemCode sequence.

Also of importance, notice the use of the @Input2 and @Input3 values. These input variables contain dates that are used to select a data range of inventory items.

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dbo.CostModelOperation								
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do.Country								
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dbo.CreateJob								
dbo.CreatePurchaseOrder								
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dbo.CurrencyHistory								
dbo.Customer								
dbo.CustomerAgingHistory		CustomerCode	CustomerMame	0.ddsocc1	Cau	L ShakaCada	Zie	Dhana
dbo.CustomerAbit		CustomerCode	Customername	Addressi	City	StateCode	ΖIÞ	PHONE
dbo.CustomerBuvingGroup	<u> </u>	000200	3 G P C, Inc.	3001 Quebec St	Dallas	TX	75247	214-678-(
dbo.CustomerChannel		000600	Crest Industries	1021 Crest Ave.	Plano	TX	75102	(972) 396 📃
🗉 🧾 dbo.CustomerCommissionableItems		003300	Church Contract	123 West Main	McKinney	TX	75042	(972) 555
표 🔲 dbo.CustomerContact		004500	First United Met	123 West Main	Allen	TX	75002	(972) 555
🗉 🧾 dbo.CustomerFiscalPeriodSalesCom		004600	Execute Rectict	4E6 Cauth Elas	Dises	TY	75002	(072) 555
🗉 🧾 dbo.CustomerGeographical		004000	Freewill bapust	450 SUULI EIIII	Pialio	14	75022	(972) 555
dbo.CustomerHistory		006400	LOCKHEED FT	LOCKHEED BLVD.	FORT WORTH	TX	76108	(817) 777
Image:	<	010400	Stouope Pieuelo	221E Cilvardona	Diana	TV	75022	072 424 2
a abo, customeritem code		1 of 10						
		1 0110						
Ready								

Using SQL Management Studio or Query Analyzer to Create Data Exports

If you are comfortable using the Microsoft tools SQL Server Management Studio and Query Analyzer, you can use those tools to develop you query. Then using Copy/Paste you can copy your query into the Query field in Data Export.

Remember you will then need to modify the query using inputs to allow user to dynamically run your query.

) nancys - System>Data Export>Data Export Source			
System CRM Sales Inventory Manufacturing Costing	Purchasing Accounting In	fo	
		×	2 4
DataSource	Data Source	User Defined	Query
AR As Of Aging			
AR As Of Aging Summary	Company Code Company	Name	
Backlog	ABWL Info-Pow	er International - Lean Mfg	
Booking	*Data Source	Active	
Customer	UsageAnalysis		Undate Columns
CustomersByStateInput			
GL Trial Balance	Description		
GLActivity	Usage Analysis by Vendor		
GLBalance	Formatted	Calendar Type Selection	
GLBudget		×	
GLHistory	Division Criteria	Calandar Type Criteria	
Inventory OOH			
Inventory QOH			
Invoices	Warehouse Criteria	Default Calendar Type	
Myorehyoicoc		×	
OpenSelecOrder	Schedule Type Criteria	Comparative Date Range	
OpenSoferOrderDate			
Purchase Orders	Mfa Item Type Criteria	Customer Code Criteria	
Sales			
SalesBenort12Periods			
Shippers	Item Family Criteria	Master Customer Code Criteria	
StockValuationComparison			
StockValuationComparisonC2O	Custom Stored Procedure		
TexasCustomers	UsageAnalysis		
UsageAnalysis	Queru Dete Source		
Vendor	Guery Data Source		
VendorltemsSold			
VendorPurchasesYTD			
	Add New Save	elete <u>C</u> lear Refresh <u>P</u> rint	Close

#### Using a Stored Procedure to Produce a Data Export

On occasion, you might have a very complex report, similar to the UsageAnalysis shown below. This example uses temp tables to process the data.

To use a stored procedure, enter the name of the stored procedure in the Custom Stored Procedure field.

lystem CRM Sales I	nventory Manufacturin	g Costing	Purchasing Acc	ounting	Info				۳
DataSource			Data S	ource	ĺ	User Define	d	Query	
AR As Of Aging					1			1	
AR As Of Aging Summary			Company Code	Compa	iny Name				
Backlog			ABWL	Info-Po	ower International -	Lean Mfg			
Booking			+D. 1. 0						
Customer			"Data Source						
CustomersByStateInput			UsageAnalysis	;		_			
GL Trial Balance			Description						
GLActivity			Usage Analysi	s by Vend	or				
GLBalance			Lahel 1		Type 1	Size 1	R.I7.1		
GLBudget			Vendor Code		C - Char	6			
GLHistory			Vendor Code			0			
Inventory			Label 2		Type 2	Size 2	RJZ 2		
Inventory QOH			Begin Date		D - Date				
Invoices			Label 3		Туре З	Size 3	RJZ 3		
Invoices GL Sales Posting			End Date		D - Date	✓ 0			
MyersInvoices			Label 4		Түре 4	Size 4	RJZ 4		
OpenSalesOrder						✓ 0			
OpenSOforOrderDate			Label 5		Type 5	Size 5	BJZ 5		
Purchase Orders					1366.0	0	1.02.0		
Sales			Lohal G			Size C	DITC		
SalesReport12Periods			Labero		Туре 6	3120 0	RJZ 6		
Snippers						V U			
Stock valuation Comparison	1		Label 7		Туре 7	Size 7	RJZ 7		
Stock Valuation Compansor	1020					✓ 0			
TexasOustomers			Label 8		Type 8	Size 8	RJZ 8		
Vendor						<b>v</b> 0			
VendorltemsSold			Label 9		Type 9	Size 9	RJZ 9		
VendorPurchasesYTD					.,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	V 0			
venuari dichases i ID			Save D	elete	Reset Clear	Print	Close		

Using the User Defined tab, define the input variables to be used during the processing of the query for data retrieval.

Custom Query for UsageAnalysis data export.

```
PRINT 'UsageAnalysis'
GO
if exists (select * from sysobjects where id =
object_id('dbo.UsageAnalysis') and sysstat & 0xf = 4) drop procedure
dbo.UsageAnalysis
GO
CREATE PROCEDURE dbo.UsageAnalysis
(
  @CompanyCode char(4),
  @UserCode char(11),
  @DataSource char(50),
  @DivisionCode char(10),
  @WarehouseCode char(10),
  @WarehouseCode char(1),
  @MfgItemTypeCode char(1),
  @ItemFamilyCode char(20),
  @CalendarTypeCode char(1),
  @DateRangeTypeCode char(1),
  @FiscalBeginYear char(4),
  Info-Power International, Inc. Page 35
  3345 Silverstone • Plano, Texas 75023
  (972) 424-4447
```

```
@FiscalBeginPeriod char(2),
@FiscalEndYear char(4),
@FiscalEndPeriod char(2),
@CalendarBeginDate datetime,
@CustomerCode char(10)
                                   datetime,
@CustomerCode
                                  char(10),
@MasterCustomerCode
                                    char(10),
@Input1
                                           varchar(50),
@Input2
                                           varchar(50),
@Input3
                                           varchar(50),
@Input4
                                           varchar(50),
@Input5
                                           varchar(50),
@Input6
                                           varchar(50),
@Input7
                                           varchar(50),
@Input8
                                           varchar(50),
                                           varchar(50),
@Input9
@Debuq
                                            int = 0
) AS
declare @Count
                               int,
         @errno
                           int,
varchar(255),
                               int,
         @errmsg
         @err1
         @err2
         @err3
         @err4
         @err5
         @err6
         @err7
         @err8
         @err9
         @Gosub
                               varchar(20)
select @Count = 0
/*
       Copyright (C) 2001 Info-Power International, Inc. All rights
reserved.
       Proprietary Information not for Disclosure.
       $Header: /ABW/SPSql/UsageAnalysis.sql 1 2/10/11 11:33a Jeffz
$
*/
if @Debug = 1
begin
       select @DataSource
end
set nocount on
/*
declare @CompanyCode
                                         char(4)
              @Input1
                                                   char(10)
1
              @Input2
                                                   datetime
1
              @Input3
                                                   datetime
*/
              @fetch_Inventory int
declare
              @fetch SystemCalendar int
/
              @ItemCode
                                           char(24)
Info-Power International, Inc.
                                                                                Page 36
3345 Silverstone • Plano, Texas 75023
(972) 424-4447
```

```
@ItemSalesClassCodechar(10)@SafetyStockdecimal(12,2)@LeadTimeint@MeanDaysint@Meandecimal(12,2)@Quantitydecimal(12,2)@ScheduleDatedate@UsageQtydecimal(12,2)@StandardCostdecimal(16,6)@OuantityONHandChangodecimal(12,2)
/
1
              @QuantityOnHandChange decimal(12,2)
              @QuantityOnHand decimal(12,2)
@VendorCode char(10)
/
/*
select @CompanyCode = 'STRK'
, @Input1 = '00050480'
, @Input2 = '2010-04-01'
, @Input3 = '2010-06-30'
*/
select @MeanDays = Count(*)
from SystemCalendar
where CompanyCode = @CompanyCode
and ScheduleDate between @Input2 and @Input3
and WorkDay = 1
delete UsageAnalysis_1
where UserCode = @UserCode
delete UsageAnalysis_2
where UserCode = @UserCode
declare csr_Inventory cursor local for select ItemCode,
ItemSalesClassCode,LeadTime, StandardCost,
       (select sum(QuantityOnHand) from InventoryLocation where
CompanyCode = im.CompanyCode and ItemCode = im.ItemCode) as OnHandQty,
       (select max(SafetyStock) from InventoryLocation where CompanyCode
= im.CompanyCode and ItemCode = im.ItemCode) as SafetyStock
       from Inventory im
       where CompanyCode = @CompanyCode
       and PrimaryVendorCode = @Input1
       and Active = 1
       and (select sum(QuantityOnHand) from InventoryLocation where
CompanyCode = im.CompanyCode and ItemCode = im.ItemCode) <> 0
open csr_Inventory
FETCH NEXT FROM csr_Inventory INTO
      @ItemCode
      @ItemSalesClassCode
1
      @LeadTime
1
      @StandardCost
/
       @QuantityOnHand
/
       @SafetyStock
```

select @fetch\_Inventory = @@fetch\_status

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```
while @fetch_Inventory = 0
begin
      --select @Mean = (sum(QuantityOnHandChange) * (-1) ) / @MeanDays
      select @Quantity = sum(QuantityOnHandChange) * (-1)
      from InventoryTransactions
      where CompanyCode = @CompanyCode
      and ItemCode = @ItemCode
      and TransactionTypeCode = 6
      and TransactionDate between @Input2 and @Input3
      select @Mean = @Quantity / @MeanDays
      --print @ItemCode + 'Mean Days '+str(@MeanDays) +' Qty
'+str(@Quantity)+' Mean '+cast(@Mean as varchar(20))
      insert into UsageAnalysis_1 (UserCode,CompanyCode,
ItemCode, ItemSalesClassCode,
PeriodUsage, OnHandQty, LeadTime, StandardCost, Mean, SafetyStock)
      select
@UserCode,@CompanyCode,@ItemCode,@ItemSalesClassCode,ISNULL(@Quantity,0
),@QuantityOnHand,@LeadTime,@StandardCost,ISNULL(@Mean,0),@SafetyStock
      declare csr_SystemCalendar cursor local for select ScheduleDate
      from SystemCalendar
            where CompanyCode = @CompanyCode
            and WorkDay = 1
            and ScheduleDate between @Input2 and @Input3
      open csr SystemCalendar
      FETCH NEXT FROM csr_SystemCalendar INTO
            @ScheduleDate
      select @fetch_SystemCalendar = @@fetch_status
      while @fetch_SystemCalendar = 0
      begin
            select @QuantityOnHandChange = (select
sum(QuantityOnHandChange) *(-1))
            from InventoryTransactions
            where CompanyCode = @CompanyCode
            and ItemCode = @ItemCode
            and TransactionTypeCode = 6
            and TransactionDate = @ScheduleDate
            insert into UsageAnalysis_2(UserCode, CompanyCode, ItemCode,
TransactionDate, TransactionQty, Mean, TransMinusMean, TransMinusMeanSQ)
            select
@UserCode,@CompanyCode,@ItemCode,@ScheduleDate,ISNULL(@QuantityOnHandCh
ange, 0), ISNULL(@Mean, 0),
            ISNULL(@QuantityOnHandChange,0)-
ISNULL(@Mean,0),POWER((ISNULL(@QuantityOnHandChange,0)-
ISNULL(@Mean,0)),2)--(@QuantityOnHandChange-@Mean)^2
            FETCH NEXT FROM csr SystemCalendar INTO
                  @ScheduleDate
```

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```
select @fetch_SystemCalendar = @@fetch_status
      end
      close csr_SystemCalendar
      deallocate csr_SystemCalendar
      FETCH NEXT FROM csr Inventory INTO
      @ItemCode
      @ItemSalesClassCode
1
     @LeadTime
,
     @StandardCost
      @QuantityOnHand
1
      @SafetyStock
      select @fetch_Inventory = @@fetch_status
end
close csr_Inventory
deallocate csr_Inventory
select
@Input1 as VendorCode,@Input2 as BeginDate,@Input3 as EndDate,
tl.ItemCode,ItemDescription,tl.ItemSalesClassCode,tl.StandardCost,Perio
dUsage,Mean,
(select sqrt(sum(TransMinusMeanSQ)) from UsageAnalysis_2 where
CompanyCode=t1.CompanyCode and ItemCode=t1.ItemCode) / sqrt(@MeanDays-
1) as StdDeviation,
SafetyStock, OnHandQty, t1.LeadTime
from UsageAnalysis 1 t1
join Inventory i on i.CompanyCode=t1.CompanyCode and
i.ItemCode=t1.ItemCode
where UserCode = @UserCode
/*
select *
from UsageAnalysis_2
select *
from UsageAnalysis 1
*/
```

#### Using an Existing ABW Report to Create a Data Export

Sometimes you might have the need to expand on an existing ABW report or even just take an existing report and export that information to an Excel spreadsheet.

You can execute the report's stored procedure and pass the required parameters to export the report.

The following example uses the standard ABW General Ledger Trial Balance Report.

🛇 nancys - System>Data Export>Data Export Source					
System CRM Sales Inventory Manufacturing	Costing	Purchasing Accounting	Info		
Datacys - System >Data Export >Data Export >Data Export >Data Export >Data Export Source         System       CRM       Sales       Inventory       Manufacturing         DataSource       AR As Of Aging       AR As Of Aging       AR As Of Aging Summary         Backlog       Booking       Customer       CustomersByStateInput         CLTrial Balance       GLActivity       GLBalance         GLHistory       Inventory       Inventory         Inventory       OH       Inventors         MyersInvices       DpenSoforOrderDate       Durational Contert	Costing	Purchasing Accounting Data Source Company Code Com ABWL Info- Data Source GL Trial Balance Description GL Trial Balance Repo Formatted Division Criteria Division Criteria Schedule Type Criteria Mf there Ture Criteria	Info User De pany Name Power International - Lean Mfg  rt Exported to Excel Calendar Type Selection Calendar Type Criteria Calendar Type Criteria Default Calendar Type Comparative Date Range Contense Code Criteria	fined Active	Query Query
Purchase Orders Sales SalesReport12Periods Shippers StockValuationComparison StockValuationComparisonC2O TexasCustomers UsageAnalysis Vendor VendortemsSold VendorPurchasesYTD		Mig Item Type Criteria Item Family Criteria Custom Stored Procedu Query Data Source Add New	Customer Code Criteria Master Customer Code C V re Delete Clear Refresh	riteria	Close

Create the Data Source in the same manor as all previous examples.

Page 41

System     CRM     Sales     Inventory     Manufacturing     Costing     Purc       DataSource	chasing Accounting Info Data Source Impany Code Company N BWL Info-Power ata Source L Trial Balance escription L Trial Balance Report Expo bel 1 scal Year	International - Lear International - Lear Inted to Excel Type 1	User Defined	DIZ	Query
DataSource     AR As Of Aging       AR As Of Aging Summary     Backlog       Backlog     Af       Booking     D       Customer     D       CustomersByStateInput     D       GL Trial Balance     D       GLActivity     G       GLBalance     La       GLBudget     Fi       GLHistory     La       Inventory ODH     Fi	Data Source Company N BWL Info-Power ata Source LTrial Balance Scription L Trial Balance Report Export bel 1 scal Year	International - Lear International - Lear Inted to Excel Type 1	User Defined	DIZ	Query
AR As Of Aging     Co       AR As Of Aging Summary     Al       Backlog     Al       Booking     *D.       Customer     Co       Customer     Co       GL Trial Balance     De       GLBalance     Gl       GLBalance     Lai       GLHistory     Lai       Inventory ODH     Fit	Impany Code Company N BWL Info-Power ata Source L Trail Balance scription L Trial Balance Report Expo bel 1 scal Year	lame International - Lear Inted to Excel Type 1	n Mfg		
AR As Of Aging Summary Co Backlog Al Booking D CustomersByStateInput C GL Trial Balance De GLActivity GL GLBudget L GLHistory L Inventory ODH Fit	Impany Code Company N BWL Info-Power ata Source L Trial Balance escription L Trial Balance Report Expo bel 1 scal Year	ame International - Lear Inted to Excel Type 1	Size 1		
Backlog     Al       Booking     Description       Customer     CustomersByStateInput       GL Trial Balance     Description       GLActivity     GL       GLBudget     Fit       GLHistory     La       Inventory OPH     Fit	BWL Info-Power ata Source L Trial Balance escription L Trial Balance Report Expo bel 1 scal Year	International - Lear Inted to Excel Type 1	Size 1	DIZ 4	
Booking TD Customer CustomersByStateInput G GL Trial Balance De GLActivity GI GLBalance La GLBudget Fi GLHistory La Inventory DOH	ata Source LTrai Balance scription LTrai Balance Report Expo bel 1 scal Year	inted to Excel	Size 1	817.4	
Customer CustomersByStateInput GLTrial Balance GLActivity GLBalance GLBudget GLHistory Inventory Inventory CH	ara Source L Trial Balance sscription L Trial Balance Report Expo bel 1 scal Year	inted to Excel	Size 1		
CustomersByStateInput     De       GL Trial Balance     De       GLActivity     Gl       GLBalance     La       GLBudget     Cl       GLHistory     La       Inventory     La	L Trial Balance escription L Trial Balance Report Expo bel 1 scal Year	rted to Excel	Size 1	DIZ 4	
GL Trial Balance     De       GLActivity     Gi       GLBalance     La       GLBudget     Fit       GLHistory     La       Inventory     La       Inventory QOH     Fit	escription L Trial Balance Report Expo bel 1 Iscal Year	inted to Excel	Size 1	D17.4	
GLActivity G GLBalance La GLBudget Fi GLHistory La Inventory DOH Fi	L Trial Balance Report Expo bel 1 iscal Year	rted to Excel	Size 1	D174	
GLBalance La GLBudget Fi GLHistory La Inventory OCH Fi	bel 1 scal Year	Type 1	Size 1	0174	
GLBudget Fi GLHistory La Inventory OCH Fi	iscal Year	Type T		H I I	
GLHistory La Inventory COH		TN - Numeric 🛛 💙	4	102.1	
Inventory La	1.10		с: о	5.70	
Inventory QOH	bei 2	Type 2	Size 2	RJZ 2	
	scal Period	N - Numeric Y	2		
Invoices	bel 3	Туре З	Size 3	RJZ 3	
Invoices GL Sales Posting		~	0		
MyersInvoices La	bel 4	Type 4	Size 4	RJZ 4	
OpenSalesOrder		~	0		
OpenSOforOrderDate	hel 5	Tuno E	Size 5	D175	
Purchase Orders	5010	Type 5	0.1200	1.02.0	
Sales					
SalesReport12Periods La	bel b	Туре б	Sizelb	RJZ 6	
Shippers		~	0		
StockValuationComparison	bel 7	Туре 7	Size 7	RJZ 7	
StockValuationComparisonC20		~	0		
La La	bel 8	Type 8	Size 8	RJZ 8	
UsageAnalysis		~	0		
Vendor La	hel 9	Tuno O	Size 9	D179	
Vendoritems50ld	0010	The a	0.200	1.02.5	
		¥	0		

Add the User Inputs required for processing the query; these will be passed as parameters to the stored procedure.

Below is the stored procedure 'rpt\_GLTrialBalance'. To determine the parameters that will need to be gathered from the user and passed to the stored procedure look immediately after the CREATE PROCEUDRE section. You will see the variables declared.

```
PRINT 'rpt_GLTrialBalance'
GO
if exists (select * from sysobjects where id =
object_id('dbo.rpt_GLTrialBalance') and sysstat & 0xf = 4) drop
procedure dbo.rpt_GLTrialBalance
GO
CREATE PROCEDURE dbo.rpt_GLTrialBalance
(
@CompanyCode char(4),
@FiscalYear char(4),
@GLPeriod char(2),
@Exclude bit,
@DivisionCode char(10)
) AS
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3345 Silverstone • Plano, Texas 75023
(972) 424-4447
```

```
declare @Count
                          int,
        @errno
                          int,
        @errmsg
                          varchar(255),
        @ReportDivisionCode char,
        @SiteStart
                                    int,
        @SiteLength
                                    int
           @Count = 0,
select
            @SiteStart = 0,
            @SiteLength = 0
/*
      Copyright (C) 2001 Info-Power International, Inc. All rights
reserved.
      Proprietary Information not for Disclosure.
      $Header: /ABW/SPReports/rpt GLTrialBalance.SQL 3 1/07/09
9:45a Mac $
*/
Declare @Period As Char(2)
Set @Period = @GLPeriod
If @DivisionCode = 'ALL'
begin
     select @ReportDivisionCode = '%'
end
else
begin
      select @ReportDivisionCode = @DivisionCode
end
Set NoCount On
select
          @SiteStart = NumericParameter
from ApplicationControls
where CompanyCode = @CompanyCode
      ModuleCode = 'GL'
and
          ApplicationControlCode = 'AccountSiteStart'
and
select
          @SiteLength = NumericParameter
from ApplicationControls
where CompanyCode = @CompanyCode
and
           ModuleCode = 'GL'
and
           ApplicationControlCode = 'AccountSiteLength'
Select
      COA.AccountCode,
      COA.Description,
      CODA.FiscalYear,
      Case
            When @Period = '01' Then Sum(CODA.BalanceForward + 0)
            When @Period = '02' Then Sum(CODA.BalanceForward +
                  CODA.Amount01)
            When @Period = '03' Then Sum(CODA.BalanceForward +
Info-Power International, Inc.
                                                                  Page 42
3345 Silverstone • Plano, Texas 75023
```

```
(972) 424-4447
```

```
CODA.Amount01 + CODA.Amount02)
               When @Period = '04' Then Sum(CODA.BalanceForward +
                              CODA.Amount01 + CODA.Amount02 + CODA.Amount03)
               When @Period = '05' Then Sum(CODA.BalanceForward +
                              CODA.Amount01 + CODA.Amount02 + CODA.Amount03 +
                              CODA.Amount04)
               When @Period = '06' Then Sum(CODA, BalanceForward +
                              CODA.Amount01 + CODA.Amount02 + CODA.Amount03 +
                              CODA.Amount04 + CODA.Amount05)
               When @Period = '07' Then Sum(CODA.BalanceForward +
                              CODA.Amount01 + CODA.Amount02 + CODA.Amount03 +
                              CODA.Amount04 + CODA.Amount05 + CODA.Amount06)
               When @Period = '08' Then Sum(CODA.BalanceForward +
                              CODA.Amount01 + CODA.Amount02 + CODA.Amount03 +
                              CODA.Amount04 + CODA.Amount05 + CODA.Amount06 +
                              CODA.Amount07)
               When @Period = '09' Then Sum(CODA.BalanceForward +
                              CODA.Amount01 + CODA.Amount02 + CODA.Amount03 +
                              CODA.Amount04 + CODA.Amount05 + CODA.Amount06 +
                              CODA.Amount07 + CODA.Amount08)
               When @Period = '10' Then Sum(CODA.BalanceForward +
                             \texttt{CODA}, \texttt{Amount01} + \texttt{CODA}, \texttt{Amount02} + \texttt{CODA}, \texttt{Amount03} + \texttt{CODA}, \texttt{Amount03} + \texttt{CODA}, \texttt{Amount03} + \texttt{CODA}, \texttt{CODA}, \texttt{Amount03} + \texttt{CODA}, \texttt{Amount03} + \texttt{CODA}, \texttt{Amount03} + \texttt{CODA}, \texttt{CODA}, \texttt{Amount03} + \texttt{CODA}, \texttt
                              CODA.Amount04 + CODA.Amount05 + CODA.Amount06 +
                              CODA.Amount07 + CODA.Amount08 + CODA.Amount09)
               When @Period = '11' Then Sum(CODA.BalanceForward +
                             CODA.Amount01 + CODA.Amount02 + CODA.Amount03 +
                              CODA.Amount04 + CODA.Amount05 + CODA.Amount06 +
                              CODA.Amount07 + CODA.Amount08 + CODA.Amount09 +
                              CODA.Amount10)
               When @Period = '12' Then Sum(CODA.BalanceForward +
                              CODA.Amount01 + CODA.Amount02 + CODA.Amount03 +
                              CODA.Amount04 + CODA.Amount05 + CODA.Amount06 +
                              CODA.Amount07 + CODA.Amount08 + CODA.Amount09 +
                              CODA.Amount10 + CODA.Amount11)
               When @Period = '13' Then Sum(CODA.BalanceForward +
                             CODA.Amount01 + CODA.Amount02 + CODA.Amount03 +
                              CODA.Amount04 + CODA.Amount05 + CODA.Amount06 +
                              CODA.Amount07 + CODA.Amount08 + CODA.Amount09 +
                              CODA.Amount10 + CODA.Amount11 + CODA.Amount12)
               Else 0.00
End As BeginningBalance,
Case
               When @Period = '01' Then CODA.Amount01
               When @Period = '02' Then CODA.Amount02
               When @Period = '03' Then CODA.Amount03
               When @Period = '04' Then CODA.Amount04
               When @Period = '05' Then CODA.Amount05
               When @Period = '06' Then CODA.Amount06
               When @Period = '07' Then CODA.Amount07
               When @Period = '08' Then CODA.Amount08
               When @Period = '09' Then CODA.Amount09
               When @Period = '10' Then CODA.Amount10
               When @Period = '11' Then CODA.Amount11
               When @Period = '12' Then CODA.Amount12
               When @Period = '13' Then CODA.Amount13
```

Info-Power International, Inc. 3345 Silverstone • Plano, Texas 75023 (972) 424-4447 Page 43

```
Else 0.00
      End As Amount,
      @Period As GLPeriod,
      @Exclude As Exclude,
      @DivisionCode as DivisionCode,
      case when @DivisionCode = 'ALL' then 'ALL'
             else (select Description from Division D
                        where @CompanyCode = D.CompanyCode and
                                     @DivisionCode = D.DivisionCode)end
      as DivDescription
From
      ChartOfAccounts COA
Inner Join
      ChartOfAccountsData CODA
On
      COA.CompanyCode = CODA.CompanyCode And
      COA.AccountCode = CODA.AccountCode
Where
      COA.CompanyCode = @CompanyCode And
      CODA.FiscalYear = @FiscalYear And
      CODA.GLDataTypeCode = '1' And
      substring(COA.AccountCode, @SiteStart, @SiteLength) LIKE
@ReportDivisionCode and
      @Period = @GLPeriod
Group By
      COA.AccountCode,
      COA. Description,
      CODA.FiscalYear,
      CODA.BalanceForward,
      CODA.Amount01,
      CODA.Amount02,
      CODA.Amount03,
      CODA.Amount04,
      CODA.Amount05,
      CODA.Amount06,
      CODA.Amount07,
      CODA.Amount08,
      CODA.Amount08,
      CODA.Amount09,
      CODA.Amount10,
      CODA.Amount11,
      CODA.Amount12,
      CODA.AMount13
CLEANUP:
return
GO
return
GO
```

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🔊 nancys - Syste	m>Data	Export>Data	Export Source										
System CRM	Sales	Inventory	Manufacturing	Costing	Purchasing	Accountir	ng l	Info					
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UsageAnalysis Vendor VendorItemsS VendorPurcha	s old sesYTD				Save	Delete	) [ P	Reset	Clear	Print Clu	ose		X

The Custom Query will contain a SQL statement to execute the report's stored procedure along with the parameters required.

#### Additional Examples

1) Using a UNION

Select S.CustomerCode, C.CustomerName, substring (A.SalesAccountCode, 6,4)as Account, S.ItemCode as ItemCode, I.ItemDescription as ItemDescription, sum(case when S.SalesPeriod = 1 then (S.QuantityInvoiced \* S.UnitPrice ) else 0 end) as 'JanSales', sum(case when S.SalesPeriod = 2 then (S.QuantityInvoiced \* S.UnitPrice ) else 0 end) as 'FebSales', sum(case when S.SalesPeriod = 3 then (S.QuantityInvoiced \* S.UnitPrice ) else 0 end) as 'MarSales'. sum(case when S.SalesPeriod = 4 then (S.QuantityInvoiced \* S.UnitPrice ) else 0 end) as 'AprSales', sum(case when S.SalesPeriod = 5 then (S.QuantityInvoiced \* S.UnitPrice ) else 0 end) as 'MaySales', sum(case when S.SalesPeriod = 6 then (S.QuantityInvoiced \* S.UnitPrice ) else 0 end) as 'JunSales', sum(case when S.SalesPeriod = 7 then (S.QuantityInvoiced \* S.UnitPrice ) else 0 end) as 'JulySales', sum(case when S.SalesPeriod = 8 then (S.QuantityInvoiced \* S.UnitPrice ) else 0 end) as 'AugSales', sum(case when S.SalesPeriod = 9 then (S.QuantityInvoiced \* S.UnitPrice ) else 0 end) as 'SepSales', sum(case when S.SalesPeriod = 10 then (S.QuantityInvoiced \* S.UnitPrice ) else 0 end) as 'OctSales'. sum(case when S.SalesPeriod = 11 then (S.QuantityInvoiced \* S.UnitPrice ) else 0 end) as 'NovSales', sum(case when S.SalesPeriod = 12 then (S.QuantityInvoiced \* S.UnitPrice ) else 0 end) as 'DecSales'

From SalesAnalysisHistory S, Inventory I, Customer C, SalesCOGSControl A where S.CompanyCode = @CompanyCode and S.SalesYear = @Input1 and

I.CompanyCode = S.CompanyCode and I.ItemCode = S.ItemCode and C.CompanyCode = S.CompanyCode and C.CustomerCode = S.CustomerCode and A.CompanyCode = S.CompanyCode and A.CustomerSalesClassCode = C.CustomerSalesClassCode and A.ItemSalesClassCode = I.ItemSalesClassCode and substring (A.SalesAccountCode, 6,4) in ('3002','3004')

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group by S.CustomerCode, C.CustomerName, A.SalesAccountCode, S.ItemCode, I.ItemDescription

UNION

Select S.CustomerCode, C.CustomerName, substring (S.AccountCode, 6,4)as Account, S.MiscChargeCode as ItemCode, S.Description as ItemDescription, sum(case when S.SalesPeriod = 1 then (S.LineItemAmount ) else 0 end) as 'JanSales', sum(case when S.SalesPeriod = 2 then (S.LineItemAmount ) else 0 end) as 'FebSales', sum(case when S.SalesPeriod = 3 then (S.LineItemAmount ) else 0 end) as 'MarSales', sum(case when S.SalesPeriod = 4 then (S.LineItemAmount ) else 0 end) as 'AprSales', sum(case when S.SalesPeriod = 5 then (S.LineItemAmount ) else 0 end) as 'MaySales', sum(case when S.SalesPeriod = 6 then (S.LineItemAmount ) else 0 end) as 'JunSales', sum(case when S.SalesPeriod = 7 then (S.LineItemAmount ) else 0 end) as 'JunSales', sum(case when S.SalesPeriod = 8 then (S.LineItemAmount ) else 0 end) as 'AugSales', sum(case when S.SalesPeriod = 9 then (S.LineItemAmount ) else 0 end) as 'AugSales', sum(case when S.SalesPeriod = 10 then (S.LineItemAmount ) else 0 end) as 'SepSales', sum(case when S.SalesPeriod = 11 then (S.LineItemAmount ) else 0 end) as 'OctSales', sum(case when S.SalesPeriod = 11 then (S.LineItemAmount ) else 0 end) as 'OctSales', sum(case when S.SalesPeriod = 11 then (S.LineItemAmount ) else 0 end) as 'NovSales', sum(case when S.SalesPeriod = 11 then (S.LineItemAmount ) else 0 end) as 'NovSales', sum(case when S.SalesPeriod = 12 then (S.LineItemAmount ) else 0 end) as 'NovSales',

From SalesAnalysisMiscChargesHistory S, Customer C where S.CompanyCode = @CompanyCode and S.SalesYear = @Input1 and C.CompanyCode = S.CompanyCode and C.CustomerCode = S.CustomerCode and

substring (S.AccountCode, 6,4) in ('3002','3004')

group by S.CustomerCode, C.CustomerName, s.AccountCode, S.MiscChargeCode, S.Description

Order By S.CustomerCode, ItemCode, Account

Example 2) Using SQL commands to trim data

SELECT IM.GLTableCode, IT.TransactionDate, IT.ItemCode, IM.ItemDescription, IM.ItemSalesClassCode, IT.DocumentNumber, IT.TransactionTypeCode, IT.QuantityOnHandChange, IT.TransactionStandardCost, IT.TransactionStandardCost \* IT.QuantityOnHandChange as ExtendedCost, IT.UserCode

FROM InventoryTransactions IT, Inventory IM

WHERE IT.CompanyCode = @CompanyCode AND IM.CompanyCode = IT.CompanyCode AND IM.ItemCode = IT.ItemCode AND ((LEN(LTRIM(RTRIM(@Input1)))<> 0 AND IT.ItemCode = @Input1) OR (LEN(LTRIM(RTRIM(@Input1))) = 0 )) AND ((LEN(LTRIM(RTRIM(@Input4)))<> 0 AND IT.TransactionTypeCode = @Input4) OR (LEN(LTRIM(RTRIM(@Input4))) = 0 ))AND IT.TransactionDate>= @Input2 AND IT.TransactionDate <= @Input3