

ENQ2: Browser Enquiries

Browser is an enquiries tool used in Agresso to quickly search the database and returns the results specified by a user. Browser utilises an interface to allow search data to be specified and results to be listed in a set manner. Browser also allows enquiries to be created that can prompt a user running the enquiries to enter values




See University Agresso webpage for list of available enquiries:

<http://www.gla.ac.uk/services/agresso/informationforusers/helpfulenquiries/backofficeenquiries/#d.en.149556>

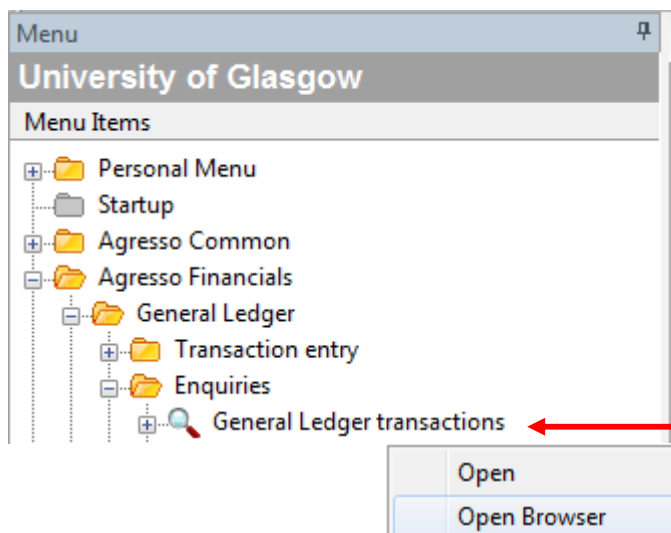
The Browser is the main tool in the Agresso Reporting suite and allows you to:

- Construct your own powerful, complex enquiries
- Drill-down to information to the level of detail required, for example from totals to individual transactions
- Export information from the database it directly into spreadsheets documents
- Use hierarchical structures within enquiries
- Bring in Relations to your enquiry
- Create your own amount columns using custom defined formulae
- Save useful enquiries as templates for private or global use
- Create clearly presented reports using rich formatting options

You can start AGRESSO Browser from the following windows in Agresso's main menu:

- Any enquiry window (represented by the  icon).
- Most maintenance/master file windows (represented by the  icon).
- Most enquiry and maintenance windows (represented by the  icon).

To start using Browser Enquiries

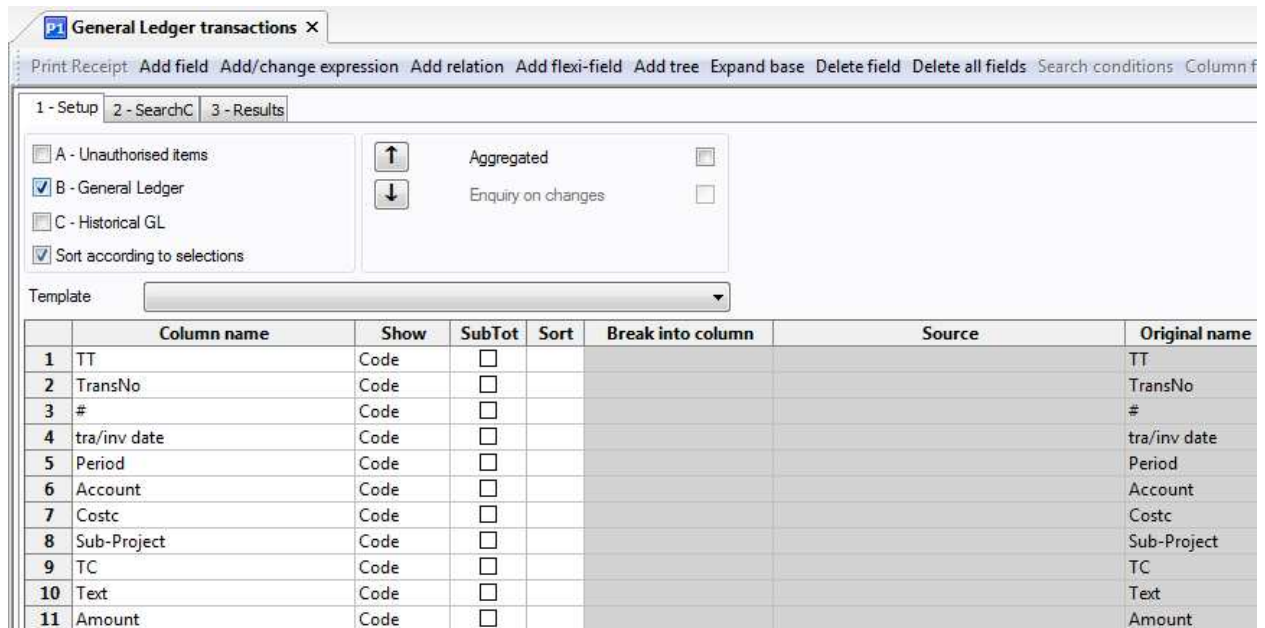


To start the Browser, right click with your mouse on the relevant window on the main menu tree and choose Open Browser from the drop-down menu that appears

The Browser window consists of the following three tabs.

1. **Setup** - Where you define the contents of the enquiry
2. **SearchC** - where you define the search criteria of the enquiry
3. **Results** - where the results of the enquiry are displayed.

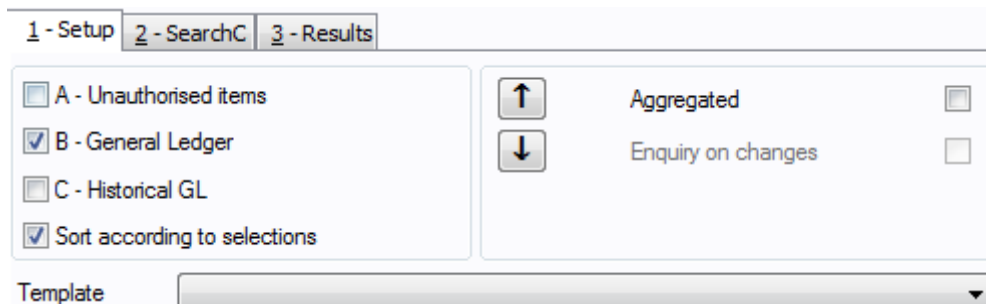
The following screen will appear:



| | Column name | Show | SubTot | Sort | Break into column | Source | Original name |
|----|--------------|------|--------------------------|------|-------------------|--------|---------------|
| 1 | TT | Code | <input type="checkbox"/> | | | | TT |
| 2 | TransNo | Code | <input type="checkbox"/> | | | | TransNo |
| 3 | # | Code | <input type="checkbox"/> | | | | # |
| 4 | tra/inv date | Code | <input type="checkbox"/> | | | | tra/inv date |
| 5 | Period | Code | <input type="checkbox"/> | | | | Period |
| 6 | Account | Code | <input type="checkbox"/> | | | | Account |
| 7 | Costc | Code | <input type="checkbox"/> | | | | Costc |
| 8 | Sub-Project | Code | <input type="checkbox"/> | | | | Sub-Project |
| 9 | TC | Code | <input type="checkbox"/> | | | | TC |
| 10 | Text | Code | <input type="checkbox"/> | | | | Text |
| 11 | Amount | Code | <input type="checkbox"/> | | | | Amount |

Setup TAB

The **Setup** tab allows you to define what information is included in your Browser enquiry.



- | | |
|------------------------------|--|
| A – Unauthorised Items | These are transaction that have been registered but not yet processed on to the General Ledger |
| B – General Ledger | These are processed transactions |
| C – Historical GL | These are transaction older than two years. |
| Sort according to selections | This will sort your results according to your set up selections |

Here you can reorder how the columns appear in the search using the Up and Down arrows



, set if the columns are displayed as code, code and text or text, set subtotalling,

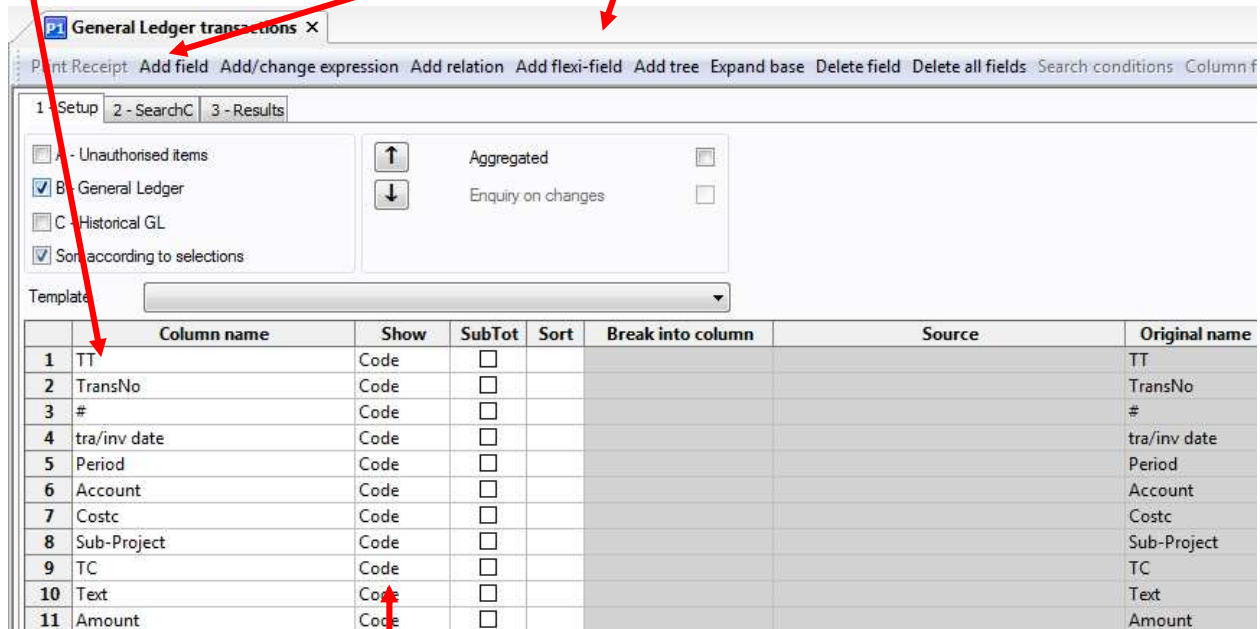
Aggregated Sets whether the results in rows with the same values are aggregated or not. For example, all rows with the same cost centre and account number would be aggregated if the other values in the row were the same. This reduces the number of rows produced in the enquiry results.

Templates In this field you can select previously saved enquiry templates. Selecting a template from this box automatically overrides any settings you have made in the Browser. Only those templates that are applicable to the window are shown here, and out of those, only the templates that are global or your own private templates.

This section lists the fields that you can select to appear in your results and how they will appear.

Column name

Contains the fields that will appear in your enquiry results. The description/text can be amended as required. The user can add and remove fields in this list using the Add field and Delete field commands.



Show

The user can select how they want the field information is displayed. Choose between:

Text - A text description of the code values for the column.

Code - The listing code used for the column's values.

Code/Text - Both the code values and the text equivalents for the column.

Join-column - Neither text nor code is displayed, but the column is an intermediate level in the search, used to link records to other values in a hierarchy. This setting is also used if chosen to display a column's sub-total values in another column.

SubTotal

The user can switch on subtotals by fields here by crossing this check box.

Sort

The sorting order relative to the other columns. The column with *Sort* 1 is sorted first, followed by 2, etc. The value 0 means that the column is not sorted. To specify descending order sorting instead of ascending (default), use a minus sign before the sort number (e.g. - 1). Note, ascending/descending sorting does not affect the relative sorting priority.

Break col.

NOT CURRENTLY USED

Source

If relations or expand base option is used this will show the details

Original Name

If column name changes this will show the original name of the column if it the field name has been changed

Please check the Section ENQ5 for information on adding Relations and Flexi-fields into Enquiries.

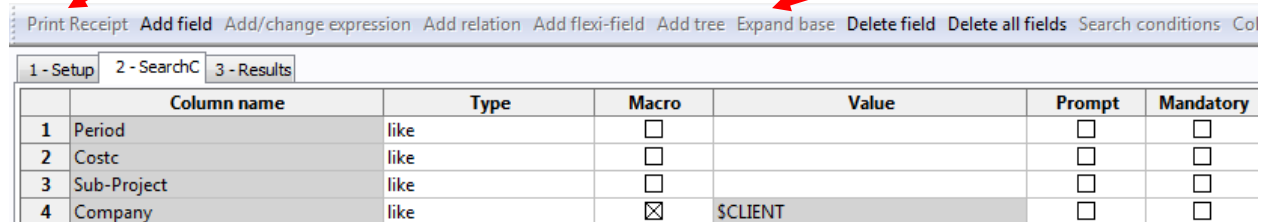
When setting up an attribute (Account/Cost Centre/Sub- Project) a set amount of information is required. The information required to set up these attributes can also be used in an enquiry. They are known as relations. Within Agresso enquiries there is the option to add relations to an enquiry

depending on the column name (Account/Cost Centre/Sub- Project). This relation can appear in your results, or, be used in your search criteria.

SearchC Tab

The **SearchC** tab is where the user enters search conditions or criteria to focus the scope of your search, for example to see data related only to certain cost centres or for Sub- Project etc...

Column name This is the field that the user will choose to search by. Select Add field and Delete field commands on the Tools menu.

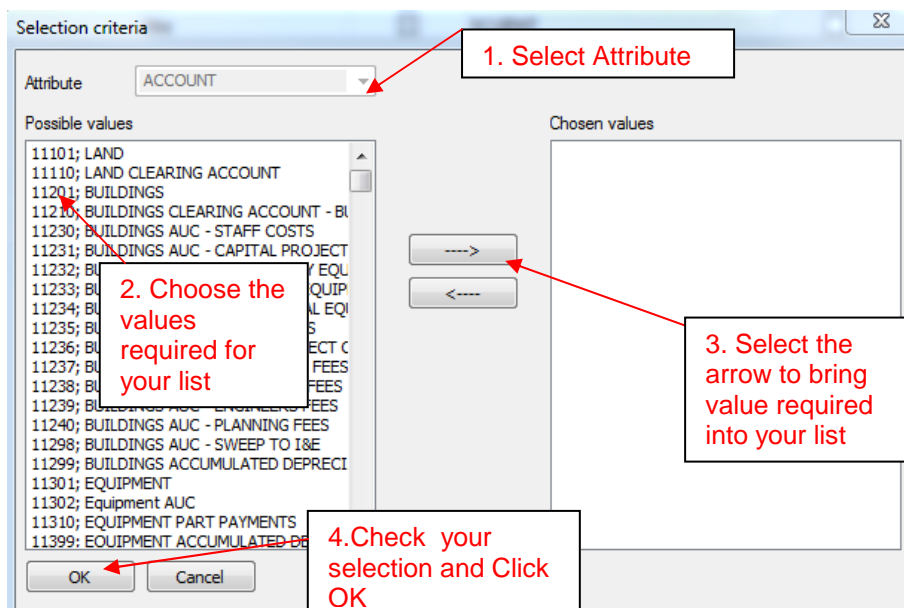


| Print Receipt Add field Add/change expression Add relation Add flexi-field Add tree Expand base Delete field Delete all fields Search conditions Col | | | | | | |
|--|-------------|------|-------------------------------------|---------|--------------------------|--------------------------|
| 1 - Setup 2 - SearchC 3 - Results | | | | | | |
| | Column name | Type | Macro | Value | Prompt | Mandatory |
| 1 | Period | like | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | Costc | like | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | Sub-Project | like | <input type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> |
| 4 | Company | like | <input checked="" type="checkbox"/> | SCLIENT | <input type="checkbox"/> | <input type="checkbox"/> |

Type Selection type.

- Like: To exactly matches the value
- Not like: To exclude a certain value
- Between: To select a range of values
- Not between: To exclude a range of values
- Greater than:
- Greater than or equal to:
- Less than:
- Less than or equal to:
- In list (**press tab**): To select a list of values
- Not in list (**press tab**): To exclude a list of values

The following screen shows how to use the In List function:



Selection criteria

Attribute: ACCOUNT

Possible values:

- 11101; LAND
- 11110; LAND CLEARING ACCOUNT
- 11201; BUILDINGS
- 11210; BUILDINGS CLEARING ACCOUNT - BU
- 11230; BUILDINGS AUC - STAFF COSTS
- 11231; BUILDINGS AUC - CAPITAL PROJECT
- 11232; BUILDINGS AUC - EQUIPMENT
- 11233; BUILDINGS AUC - EQUIPMENT
- 11234; BUILDINGS AUC - EQUIPMENT
- 11235; BUILDINGS AUC - EQUIPMENT
- 11236; BUILDINGS AUC - EQUIPMENT
- 11237; BUILDINGS AUC - EQUIPMENT
- 11238; BUILDINGS AUC - EQUIPMENT
- 11239; BUILDINGS AUC - EQUIPMENT
- 11240; BUILDINGS AUC - PLANNING FEES
- 11298; BUILDINGS AUC - SWEEP TO I&E
- 11299; BUILDINGS ACCUMULATED DEPRECI
- 11301; EQUIPMENT
- 11302; Equipment AUC
- 11310; EQUIPMENT PART PAYMENTS
- 11399; EQUIPMENT ACCUMULATED DEPRECI

Chosen values:

1. Select Attribute

2. Choose the values required for your list

3. Select the arrow to bring value required into your list

4. Check your selection and Click OK

OK Cancel

If the in list function is chosen and wish to add to the list there is two options.


- a.) Delete the field and begin again

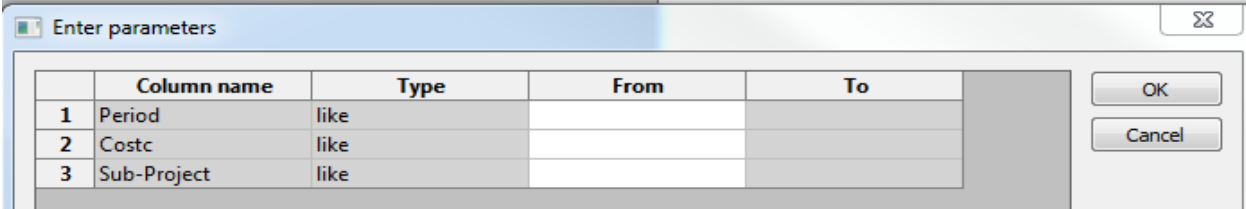
- b.) Add to the list in the value column in the exact same text format as already shown there.

Macro Sets if a macro is used in the *Value* column. A macro is a special command used in the filtering process to help further limit the search. E.g If a date is being chosen it will automatically request a date format for the value being searched.

Value Value(s) which, combined with the search type, define the values that rows in the *Results* tab can or cannot have. If the field *P* is selected, the user must not enter values in this field. By default, this field is not selected.
If using the In list or Not in list search operator type, the values to enter must be separated by commas. If using Between or Not between, the values must be separated by a semicolon-colon.

NB: If amending the values when using the in list function it may be easier to delete the row and start again.

Prompt Prompting. If this is activated for a column name, the user does not need to enter values in *Value* but are prompted for the required values when they choose Press **F7** or  on the Data menu. A dialogue box opens prompting to enter the necessary values. It can be used for all search condition Types. However, if *Type* is In list/Not in list, it will not bring up the full search criteria list, for the user to select from, but asks the user to enter the values required (separated by commas). See example of prompt when enquiry is run below:



The dialog box titled 'Enter parameters' contains a table with the following data:

| | Column name | Type | From | To |
|---|-------------|------|------|----|
| 1 | Period | like | | |
| 2 | Costc | like | | |
| 3 | Sub-Project | like | | |

Buttons for 'OK' and 'Cancel' are visible on the right side of the dialog.


Mandatory This will mean a value must be entered when running the enquiry. When this option is used Prompt will be activated also.

Once details in the Setup tab and the SearchC tab have been specified, then Press **F7** or 

The results of the enquiry will appear:

| 1 - Setup | | 2 - SearchC | | 3 - Results | | | | | | | |
|-----------|---------|-------------|--------------|-------------|-------------|----------|-------------|----|---|---------|--|
| TT | TransNo | # | tra/inv date | Period | Account | Costc | Sub-Project | TC | Text | Amount | |
| 1 | AA | 7550000105 | 10738 | 30/09/2014 | 201503 6640 | 90206000 | 141744-01 | 0 | Reverse of Accruals: Purchase Order No 1565206 | -903.60 | |
| 2 | IE | 670048183 | 6 | 26/09/2014 | 201503 6640 | 90206000 | 141744-01 | AS | HORIZON maple pedestal | 112.80 | |
| 3 | IE | 670048183 | 1 | 26/09/2014 | 201503 6640 | 90206000 | 141744-01 | AS | Right hand wave desk maplesilver | 205.20 | |
| 4 | IE | 670048183 | 2 | 26/09/2014 | 201503 6640 | 90206000 | 141744-01 | AS | 4 Gang underdesk Power unit | 19.80 | |
| 5 | IE | 670048183 | 3 | 26/09/2014 | 201503 6640 | 90206000 | 141744-01 | AS | Double Monitor Arm in Silver | 189.60 | |
| 6 | IE | 670048183 | 4 | 26/09/2014 | 201503 6640 | 90206000 | 141744-01 | AS | 1600 x 420mm high screen lucia montserrat front of desk | 93.60 | |
| 7 | IE | 670048183 | 5 | 26/09/2014 | 201503 6640 | 90206000 | 141744-01 | AS | do chair as previous PO 10905 | 282.60 | |
| 8 | IE | 670047295 | 3 | 26/09/2014 | 201503 6910 | 90206000 | 141744-01 | AS | STATIONERY | 7.31 | |
| Σ | | | | | | | | | | 7.31 | |


To amend the enquiry click on either the Set Up or SearchC tab and make the required changes.

As with any results, it is possible to filter data by grouping “like” data together, though please note this will exclude all other data. Clicking on a piece of data held on the tablefield and clicking on the filter  icon can filter the data. The user can also double click on any row of information to zoom in and find out more information regarding a transaction.

ENQ2.1 Subtotals

Agresso allows the user to subtotal and totalling when using enquiries. When choosing the enquiries the user must select the subtotal option for the particular field required. When subtotals are included in the enquiries, addition lines (Σ , $\Sigma 1$, $\Sigma 2$ etc.) are inserted in the results tab showing the subtotals that have been requested in the set up tab.

| 1 - Setup | | 2 - SearchC | | 3 - Results | | | | | | | |
|-----------|------------|-------------|-------|--------------|--------|---------|----------|-------------|----|---|---------|
| | TT | TransNo | # | tra/inv date | Period | Account | Costc | Sub-Project | TC | Text | Amount |
| 1 | AA | 755000105 | 10738 | 30/09/2014 | 201503 | 6640 | 90206000 | 141744-01 | 0 | Reverse of Accruals: Purchase Order No 1565206 | -903.60 |
| 2 | IE | 670048183 | 6 | 26/09/2014 | 201503 | 6640 | 90206000 | 141744-01 | AS | HORIZON maple pedestal | 112.80 |
| 3 | IE | 670048183 | 1 | 26/09/2014 | 201503 | 6640 | 90206000 | 141744-01 | AS | Right hand wave desk maplesilver | 205.20 |
| 4 | IE | 670048183 | 2 | 26/09/2014 | 201503 | 6640 | 90206000 | 141744-01 | AS | 4 Gang underdesk Power unit | 19.80 |
| 5 | IE | 670048183 | 3 | 26/09/2014 | 201503 | 6640 | 90206000 | 141744-01 | AS | Double Monitor Arm in Silver | 189.60 |
| 6 | IE | 670048183 | 4 | 26/09/2014 | 201503 | 6640 | 90206000 | 141744-01 | AS | 1600 x 420mm high screen lucia montserrat front of desk | 93.60 |
| 7 | IE | 670048183 | 5 | 26/09/2014 | 201503 | 6640 | 90206000 | 141744-01 | AS | do chair as previous PO 10905 | 282.60 |
| | $\Sigma 1$ | | | | | 6640 | | | | | 0.00 |
| 9 | IE | 670047295 | 3 | 26/09/2014 | 201503 | 6910 | 90206000 | 141744-01 | AS | STATIONERY | 7.31 |
| | $\Sigma 1$ | | | | | 6910 | | | | | 7.31 |
| | Σ | | | | | | | | | | 7.31 |


The user can adjust the level of detail shown in the results tab by using the forward and back video  buttons on the toolbar.

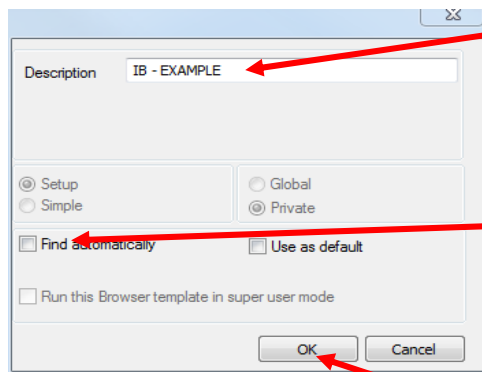
| 1 - Setup | | 2 - SearchC | | 3 - Results | | | | | | | |
|-----------|------------|-------------|---|--------------|--------|---------|-------|-------------|----|------|--------|
| | TT | TransNo | # | tra/inv date | Period | Account | Costc | Sub-Project | TC | Text | Amount |
| | $\Sigma 1$ | | | | | 6640 | | | | | 0.00 |
| | $\Sigma 1$ | | | | | 6910 | | | | | 7.31 |
| | Σ | | | | | | | | | | 7.31 |

Related to sub-totalling is the 'aggregated' box on the 'set up' window. Ticking this box compresses the enquiries output so that only one row appears for each unique column combination; however, no zoom command is available to extract further detail. Aggregated enquiries are very useful if the user wishes to see high-level balances of a large number of transaction lines. However, if doing this type of enquiries it is usually more efficient to use balance table enquiries.

ENQ2.2 Saving Browser Enquiries


Any enquiries can be saved as a template. When a template is saved it will appear as a sub-menu item in the Agresso main menu and will be listed in the enquiries name box on the enquiries browser screen.

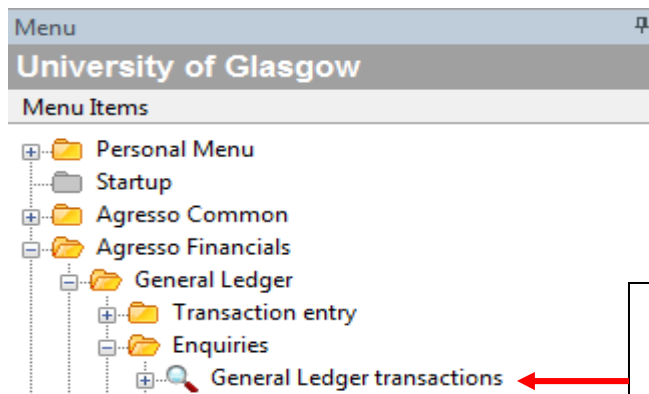
To save browser enquiries Click on  the Save Icon. This will open a file format window that will prompt the user to save).



1. **Enter your initials and a description of the enquiry template.** This description is used when the template is called up later and is shown as the heading in the enquiry windows.
2. **DO NOT Select Use as default. Do not use this option.**
3. If Required - Select the check box *Find automatically* for the enquiry to run automatically when the enquiry is opened. (NB: Careful consideration should be given before deciding if a query should be run automatically or not as the selection criteria used may not always be relevant).
4. **Click OK and update the menu** (From Agresso file menu select **VIEW** then **REFRESH MENU**).

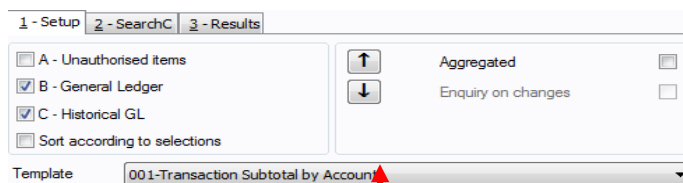
ENQ2.3 Using Saved Enquiries

Saved Enquiry are saved with the main menu and are represented by the  icon. Standard enquiries are saved within the same section of the menu they were created in.



To start the Browser, right click with your mouse on the relevant window on the main menu tree and choose Open Browser from the drop-down menu that appears

This will open the following screen:



The user can select their enquiry from the dropdown menu and run or amend the enquiry as required.