

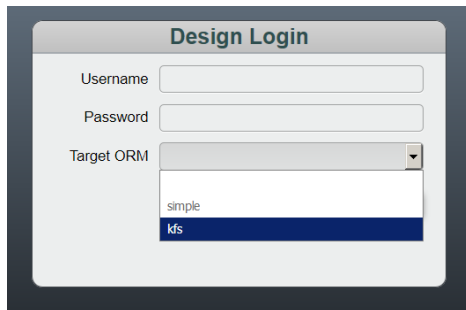
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## Creating a Query Document

### Login

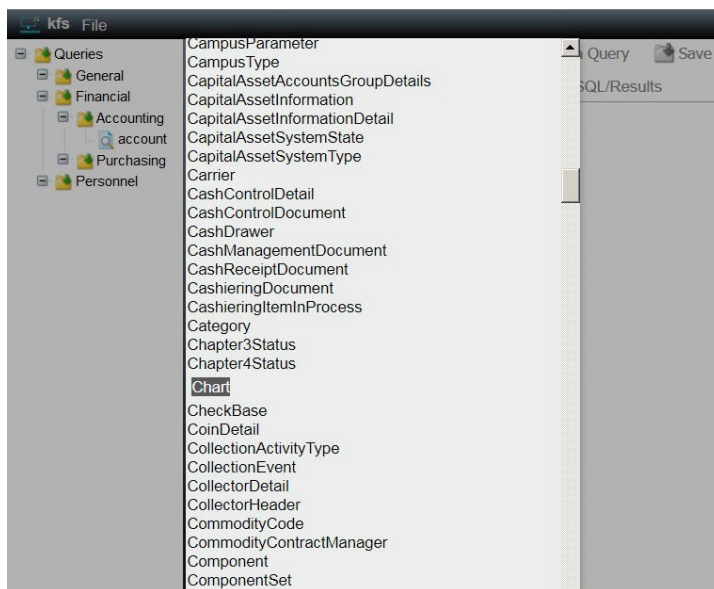
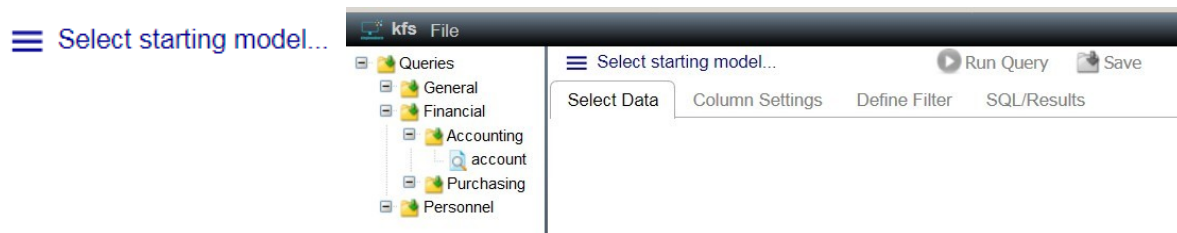
Pull up the application in the browser, select the desired ORM, enter Username and Password if required and click **Login**.



The 'Design Login' dialog box contains three fields: 'Username' (text input), 'Password' (password input), and 'Target ORM' (a dropdown menu). The dropdown menu is open, showing two options: 'simple' and 'kfs', with 'kfs' selected and highlighted in blue.

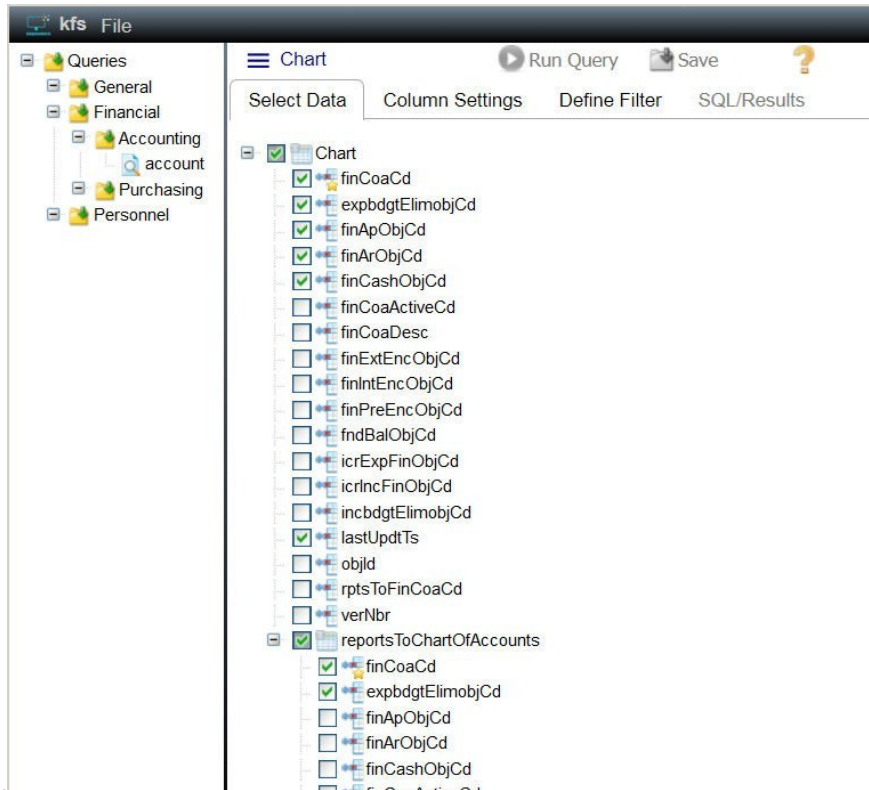
### Select Starting Model

Click the **Select Stating Model** menu button to display a list of available models:



## Select Desired Model Columns

After the starting model is selected a model hierarchy will be displayed – check the desired columns. Starred columns indicate primary keys.



## Column Setting

Customize the selected column settings on the Column Settings tab. The **Label** field is used in the SQL select for the “as” column setting. Aggregate functions can be applied via the **Function** dropdown. If an aggregate function is applied the appropriate “group by” clause will be generated. The **Custom** field allows the designer the flexibility to add database specific select logic. If custom is populated it will be placed in the select statement as is. Entering a “?” in the custom entry will insert the current column name into that position .

The green arrows allow you to change the select column order. If a result set is returned the columns will be in the order specified.

Chart

Run Query

Save

?

Select Data

Column Settings

Define Filter

SQL/Results

1. finCoaCd	Label: <input type="text" value="Chart"/>	Function: <input type="text"/>	Sort Pos: <input type="text" value="1"/>	Desc: <input type="checkbox"/>	Custom: <input type="text"/>
2. expbdgtElimobjCd	Label: <input type="text"/>	Function: <input type="text"/>	Sort Pos: <input type="text"/>	Desc: <input type="checkbox"/>	Custom: <input type="text"/>
3. finApObjCd	Label: <input type="text"/>	Function: <input type="text"/>	Sort Pos: <input type="text"/>	Desc: <input type="checkbox"/>	Custom: <input type="text"/>
4. finArObjCd	Label: <input type="text"/>	Function: <input type="text"/>	Sort Pos: <input type="text"/>	Desc: <input type="checkbox"/>	Custom: <input type="text"/>
5. finCashObjCd	Label: <input type="text"/>	Function: <input type="text"/>	Sort Pos: <input type="text"/>	Desc: <input type="checkbox"/>	Custom: <input type="text"/>
6. lastUpdtTs	Label: <input type="text" value="Last Update"/>	Function: <input type="text"/>	Sort Pos: <input type="text" value="2"/>	Desc: <input checked="" type="checkbox"/>	Custom: <input type="text"/>
7. reportsToChartOfAccounts->finCoaCd	Label: <input type="text"/>	Function: <input type="text"/>	Sort Pos: <input type="text"/>	Desc: <input type="checkbox"/>	Custom: <input type="text"/>
8. reportsToChartOfAccounts->expbdgtElimobjCd	Label: <input type="text"/>	Function: <input type="text"/>	Sort Pos: <input type="text"/>	Desc: <input type="checkbox"/>	Custom: <input type="text"/>

## Define Filter

A where clause is required for all query documents. The **Define Filter** tab is to build the where clause. Where column entries are selected from the available column selections so ensure that desired filter columns are selected in the column selection tree. To add a filter entry, select the desired column and click the add button:

Chart

Run Query

Save

?

Select Data

Column Settings

Define Filter

SQL/Results

Add filter column:

Add Button

+

finCoaCd

expbdgtElimobjCd

finApObjCd

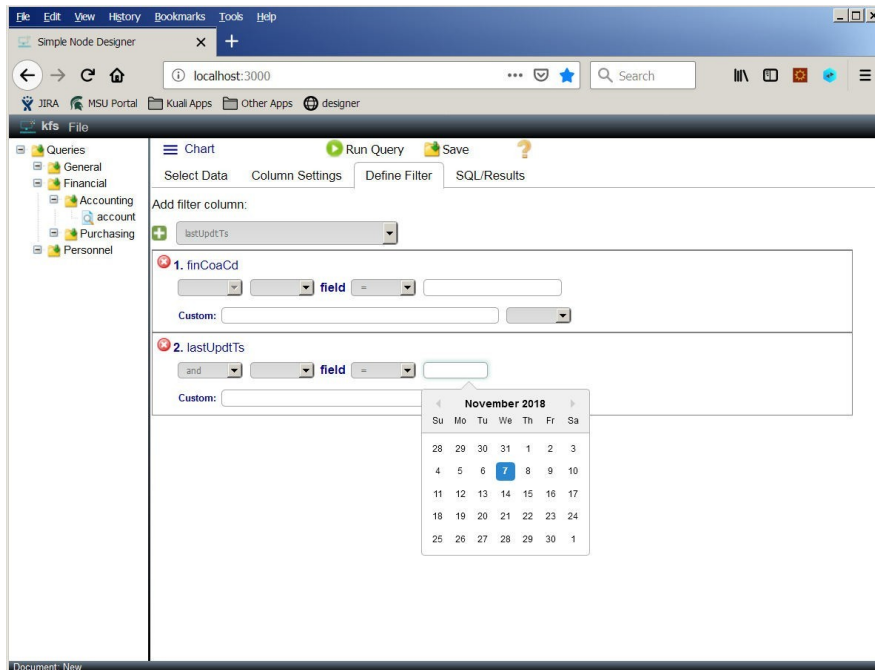
finArObjCd

finCashObjCd

lastUpdtTs

reportsToChartOfAccounts.finCoaCd

reportsToChartOfAccounts.expbdgtElimobjCd



Each filter line allows for selection (where appropriate) of:

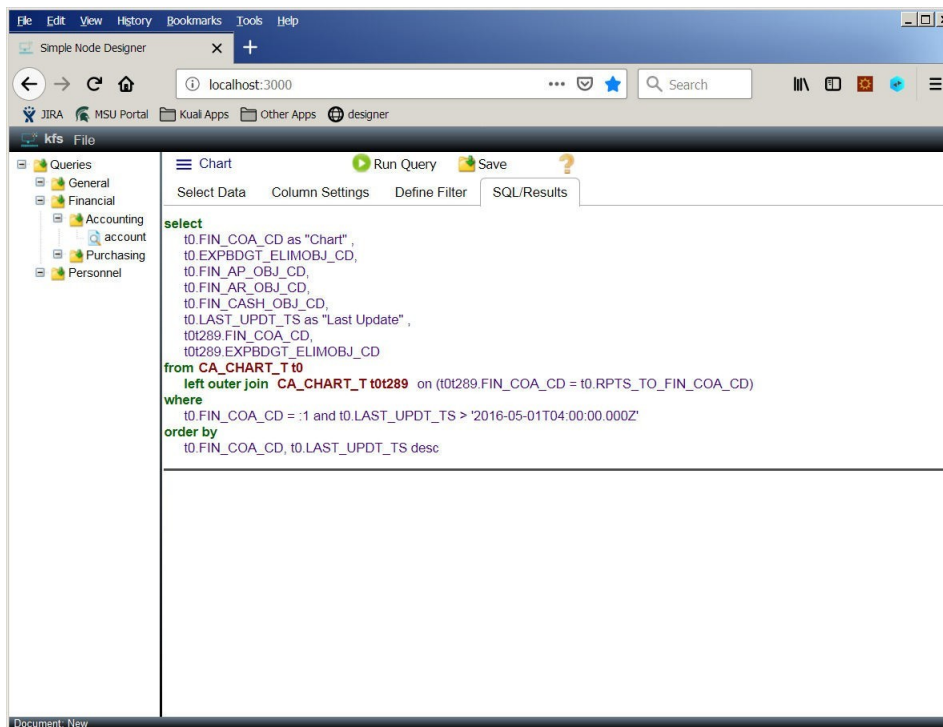
1. Logical operator (and/or)
2. Open parenthesis - (, (, (((o (((
3. Comparison operator (=, >, <, <=, >=, in, like, is null, is not null)
4. Comparison value entry
5. Close parenthesis - ), ), ))) or ))))

If a comparison value field is left empty it is assumed that the field will be populated by a bind parameter when the document is run.

The **Custom** field allows for freeform entry of any where value. If this field is populated it is added to the where clause as is. Entering a “?” in the custom entry will insert the current column name into that position .

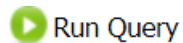
## View Generated SQL

Once a filter has been defined the user can see the generated SQL in the SQL/Results tab:



## Running the Query

To run a query, click the **Run Query** button:



When **Run Query** is clicked, a parameter entry dialog will display. If any bind parameters are required they can be entered here:

The Search Parameters dialog box is shown. It has a title bar 'Search Parameters'. Inside, there is a 'Result Format:' dropdown menu currently set to 'object graph'. Below this are two checkboxes: 'Distinct' and 'Validity Check Only', both of which are unchecked. There is a text input field labeled 'finCocd:' containing the value 'EA'. At the bottom of the dialog are two buttons: 'OK' and 'CANCEL'.

The parameter entry dialog also allows the user to enter other options:

1. Result Format – object graph or result set
2. Distinct – check to run distinct query

3. Validity Check Only – if checked, no results are generated and the validity of the generated sql is displayed in the results panel.

Once the required entries are made, clicking **Ok** will run the query and results will display in bottom panel of split pane:

### Object Graph Result:

```
Chart Run Query Save ?
Select Data Column Settings Define Filter SQL/Results
select
t0.FIN_COA_CD as "Chart",
t0.EXPBDGT_ELIMOBJ_CD,
t0.FIN_AP_OBJ_CD,
t0.FIN_AR_OBJ_CD
{
  "model": "Chart",
  "finCoaCd": "EA",
  "expbdtElimobjCd": "1209",
  "finApObjCd": "9041",
  "finArObjCd": "8118",
  "finCashObjCd": "8000",
  "lastUpdtTs": "2009-07-01T05:00:00.000Z",
  "reportsToChartOfAccounts": {
    "model": "Chart",
    "finCoaCd": "IU",
    "expbdtElimobjCd": ""
  }
}
```

### Result Set Result:

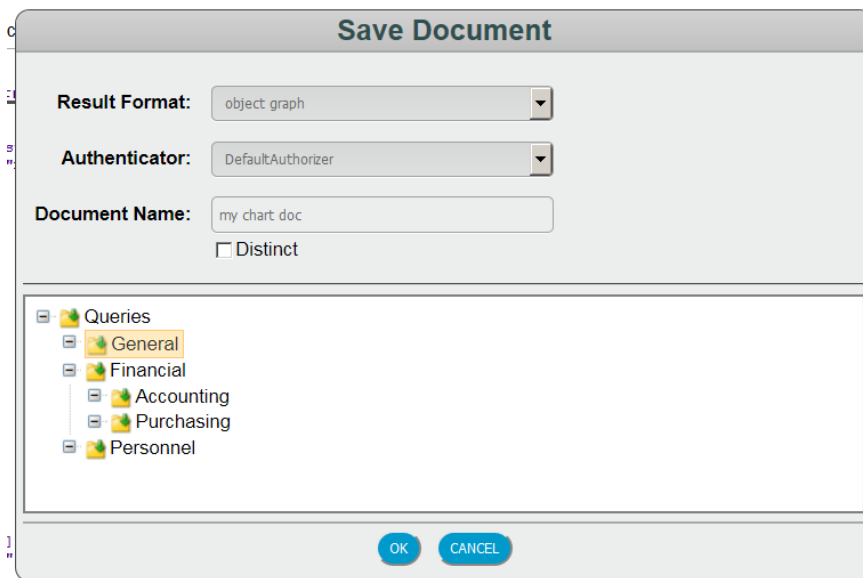
```
Chart Run Query Save ?
Select Data Column Settings Define Filter SQL/Results
select
t0.FIN_COA_CD
{
  "result": {
    "metaData": [
      {
        "name": "FIN_COA_CD"
      },
      {
        "name": "EXPBDGT_ELIMOBJ_CD"
      },
      {
        "name": "FIN_AP_OBJ_CD"
      },
      {
        "name": "FIN_AR_OBJ_CD"
      },
      {
        "name": "FIN_AP_OBJ_CD"
      },
      {
        "name": "FIN_AR_OBJ_CD"
      },
      {
        "name": "FIN_CASH_OBJ_CD"
      }
    ],
    "rows": [
      [
        "EA",
        "1209",
        "9041",
        "8118",
        "9041",
        "8118",
        "8000"
      ]
    ]
  }
}
```

## Saving the Query

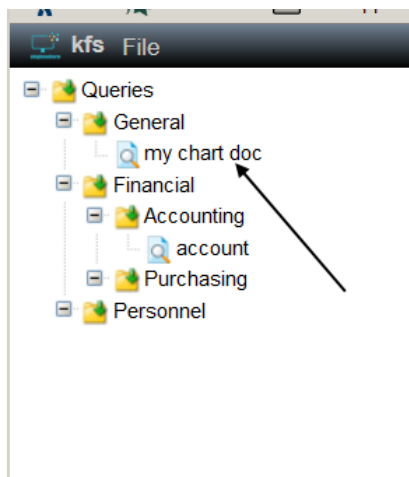
Click the save button to the Query Document



When clicked, the **Save** button will display the Save dialog:



Complete the required entries and select the document group, then click **Ok** to save the document. You should see the saved document show up in the document tree in the left pane:



## Loading and Deleting Existing Query Documents

To load or delete an existing query document, right click on the desired document and select the desired menu option:



