

Create a Dept ID List

You will create a list of all the Department, Divisions and Subdivisions that begin with 6201.

In this Instruction Guide, you will:

- Make a copy of the Dept ID Chartfield query
- Paste it in your My Folder area
- Create a calculation to extract the first four characters of the Dept ID
- Filter on a those first four characters
- Save the query
- Edit the name of the query
- Run the query
- 1. In Enterprise Reporting, click the **Financial Information** link.



- 2. Click the Finance Reference link.
- 3. Click the **DeptID Chartfield** option.

Public Folders > Financial Information > Finance - Reference	a	III 📰 🐸 📽 👪 🏵 🗄 🏃 🖻
September 3, 2010 10:14:36 AM	September 3, 2010 10:15:30 AM	Budget Reference Reference September 3, 2010 10:31:18 AM
Business Unit: Chartfield September 3, 2010 10/21:52 AM B	September 3, 2010 10:20:45 AM	Control Table Calculations September 3, 2010 10:07:33 AM
CRIS Chartfield September 3, 2010 10:31:34 AM	DeptID Chartfield September 7, 2010 11:56:10 AM	Employee Chartfield September 3, 2010 10:28:51 AM

4. Click the **Copy** button.



5. Click the My Folders link.



6. Click the **Paste** button.

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7. Click the **Open with Query Studio - DeptID Chartfield** button.

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September 10, 2010 9:13:46 AM	DeptID Chartfield September 7, 2010 11:55:10 AM								

 First, you will need to select the column on which you will create the calculations. In this example, you will create the calculation with the DeptID column. Click the DeptID column heading to select it.

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9. Click the **Calculate** button.

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10. The Calculate dialog box is opened for you.

Note the **Operation** dropdown list has **First Characters** selected by default. That's the operation needed, so no change is required there.

The **Report item** we selected to calculate is the **DeptID**. That is also selected for you.

Next, you will enter the **Number of characters**. In this example, we are interested in seeing only those Dept IDs that begin with 6201. Click in the **Number of characters** field and enter the number of digits, in this case, 4.

Calculate		
New calculated report items appear after	er the last selected item. You can s	safely delete report items that were used to create calculations.
Operation:		Expression
First characters	*	
Report item:		
DeptID		
Number of characters:		
		New item name:
		Use the default name
		0

11. Next, we'll change the name of the column heading. Click the **button by the blank name** field. Then click in the name field. Enter "First Four Digits of Dept ID".

Number of characters:	Nevv im name: (iii) ise the default name

12. The column has been inserted. Next, you will create the filter. Click the **First Four Digits of Dept ID** column heading to select the column.

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			mana SI		
I Set	D: Ascendir	ng order: DeptID: Ascending	order		
			-		
etIDA		First Four Digits of Dept ID	DeptID Descr	DeptID~Descr	
etID A		First Four Digits of Dept ID abod	DeptID Descr abcd	DeptID~Descr abcd	

13. Click the **Filter** button.



14. Click the **Search for values** link.

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•					
Data is t	urned off				Run once with all data
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Filter (Pick value	s from a list)	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		*

15. Click in the **Search** field. Enter the first four digits you want to display in your query. For this example, enter "6201".

Filter (Search for value	5)
Reduce the amount of dat	ta in the report. With the Prompt
Filter on:	
First Four Digits of Dept	ID
Keywords:	
Type one or more keyw	ords separated by spaces.
	Search
Options V	

- 16. Click the **Search** button.
- 17. Click the **6201** list item.

Type one or more k	eywords separated by spaces		
6201	Search		
Options 🛛			
		Condition:	
		Chaur and the following	
Parulta		Show only the following	•
Results: 6201		Show only the following	
Results: 6201		Snow only the following	

18. Click the **Insert** button.



- 19. Click the **OK** button.
- 20. Next you will delete the column without deleting the filter. Click the **First Four Digits of Dept ID** column heading to select it.

			22	DeptID Ch	artfield
7 Ers	t Four Digits	of Dept ID: 6201			
21 Set	ID: Ascendir	ng order: DeptID: Ascending	order		
SetIDA	DeptIDA	First Four Digits of Dept ID	DeptID Descr	DeptID~Descr	
SetID A	DeptID-A abcd	First Four Digits of Dept ID abcd	DeptID Descr abcd	DeptID~Descr abcd	

21. Click the **Delete** button.





22. The Delete dialog box will open at the bottom of the page. You do not want to delete the filter you just created! **Click the checkbox** to deselect and **remove the check**.

Dete the following:		
First Four Digits of Dept ID: 6201		
2		
	Select all	Deselect all

- 23. Click the **OK** button.
- 24. Click the **OK** button twice.
- 25. Next, you'll need to select which name to have in your query. Click the **Name Type** column heading.
- 26. Click the Filter button.
- 27. Click the **Primary** button.

Filter (Pick values from a list)	
Reduce the amount of data in the re	port. With the
Filter on: Name Type	
Show only the following	Pick values from a list) the amount of data in the report. With the on: ype tion: v only the following ✓ Not Available Preferred trimary
Not Available	

- 28. Click the **OK** button.
- 29. Here you have the option to combine the filters. You won't do that at this time. Click the **OK** button.
- 30. You already have the **Name Type** column selected. Hold down the **CTRL** key and click the **Name Current Flag** column heading. This will select them both.
- 31. Click the **Delete** button.



32. We didn't actually set the Name Current Flag, because there was only one choice, yes. However, you must decide if you want to delete the **Name Type** filter. You do NOT. So uncheck the box so the the filter remains, but the item is removed from the query. Click the **Name Type Primary** checkbox to remove the check



33. Click the **OK** button.

34. Click the Run button.



35. Your query looks good. Click the **Save** button.



36. Click the **Return** button to go back to your My Folders.



37. Next, change the name of the query to include 6201 in the title. Click the **Set properties - DeptID Chartfield** button.

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My Folders			III
My Financial Report September 10, 2010 9:1	<u>5</u> 3:46 AM	DeptID Chartfield September 10, 2010 9:20:48 AM	

38. Click in the Name field and enter "for 6201".

	Query	Permissions		
Specify the pro	operties for this e	ntry.		
Туре:	Query		Location: My Folders	SE View the sea
Owner:			Created: August 26, 2010 3:33:38 PM	
Contact:	None	Set the contact -	Modified: September 10, 2010 9:20:48 A	M
 Disable the Hide this 	is entry entry		Icon: Standard Edit	
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39. Click the **OK** button.

40. To run the query, simply click the **DeptID Chartfield for 6201** link.

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	More		

41. Each time the query runs, the data are refreshed and only those Dept IDs starting with 6201 will be included in the results.

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7 First	Four Digits	of Dept ID: 6201											
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SetIDA	DeptIDA	DeptID Descr	DeptID~Descr										
UFLOR	62010000	HR-HR ADMINISTRATION	62010000~HR-HR ADMINISTRATION										
UFLOR	62010100	HR-VICE PRESIDENTS OFFICE	62010100~HR-VICE PRESIDENTS OFFICE										
UFLOR	62010101	HR-EEO COMPLIANCE	62010101~HR-EEO COMPLIANCE										
UFLOR	62010200	HR-BENEFITS	62010200~HR-BENEFITS										
UFLOR	62010300	HR-EMPLOYMENT	62010300~HR-EMPLOYMENT										
UFLOR	62010301	HR-ACADEMIC PERSONNEL	62010301~HR-ACADEMIC PERSONNEL										
UFLOR	62010400	HR-CENTRAL LEAVE	62010400~HR-CENTRAL LEAVE										
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