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.

4. Click the **Copy** button.
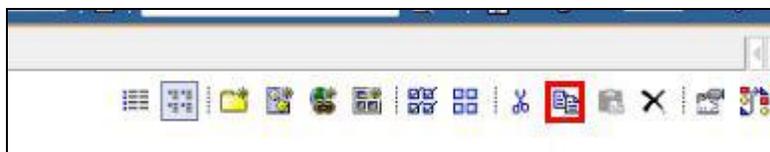
5. Click the **My Folders** link.

6. Click the **Paste** button.

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

8. 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.
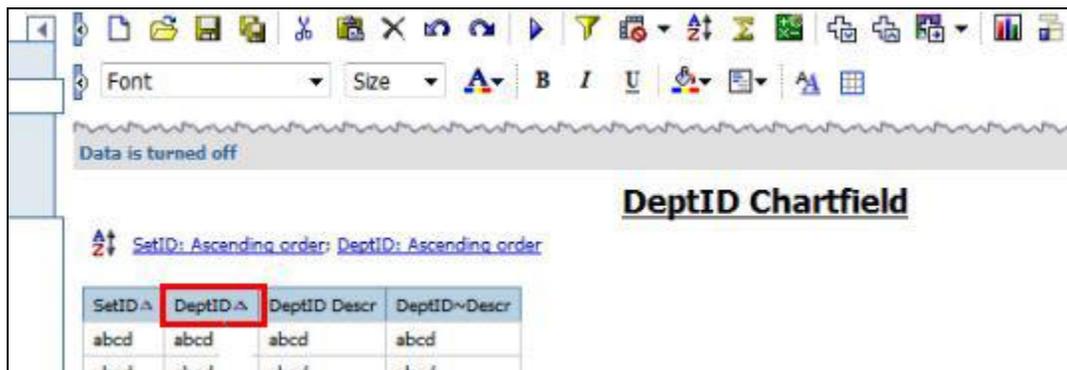
9. Click the **Calculate** button.

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.

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".

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.

13. Click the **Filter** button.

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

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

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

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.

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**.

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.

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
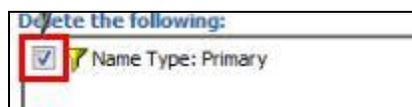
33. Click the **OK** button.
34. Click the **Run** button.

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.

38. Click in the **Name** field and enter "for 6201".
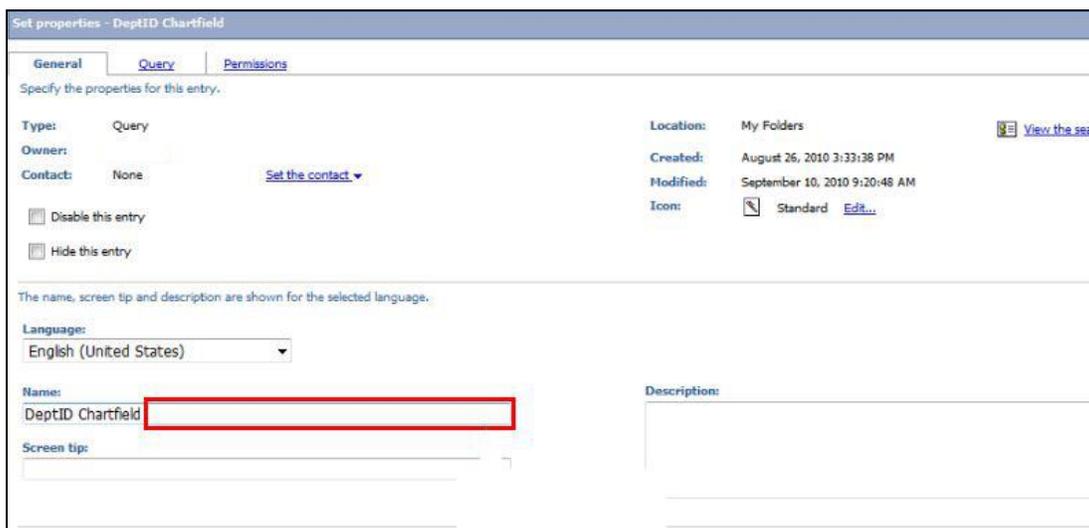
39. Click the **OK** button.
40. To run the query, simply click the **DeptID Chartfield for 6201** link.

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