

i4Query®

i4Query is a browser based data query tool for the **infoware** family of products. After logging in, subject to security requirements you can select fields and define queries to run on all of **infoware's** databases.

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i4 Excel Plugin – Combine i4 Queries with Excel's Pivot tables for very powerful, cost effective report writing across the web.



Features at a Glance

- ✓ Great data query interface to **infoware** family of products
- ✓ Simple interface to query data across multiple database tables – no SQL or other more complex commands to learn
- ✓ Sort results to multiple levels
- ✓ Move or hide columns of result page to suit
- ✓ Option to total numeric columns
- ✓ Option to generate summary totals only
- ✓ Can copy results directly to Microsoft® Excel
- ✓ Can apply specific user restrictions to fields and field values
- ✓ Can access all documents linked to a transaction – both **infoware** generated and external documents
- ✓ Web enabled

1. Access

To access i4Query you need Internet Explorer 7.0 or later. You must also have session cookies enabled on your Browser. Current versions of Chrome, Opera and Firefox are also supported.

1.1 If i4Query is installed on your server

If i4Query is installed on your server you require a URL similar to the following (except your domain name or IP address and the path will be slightly different):

<http://www.satsof.com.au/cgi-bin/ssfpcgi/none/scosysv/zz/test48/rec/wwgen/syapps>

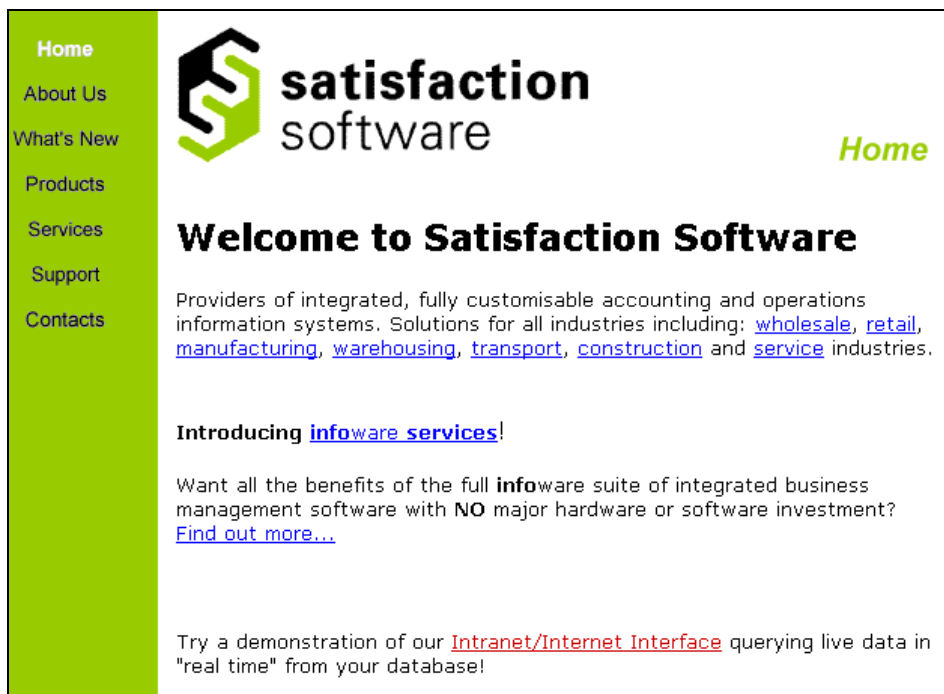
If you are unsure of this URL contact either your system administrator or Satisfaction Software support. You also need a login and password.

Handy Hint

Add your login page URL to your Favourites in your browser.


1.2 Test Drive i4Query

If you would like to test drive i4Query, visit www.satsof.com.au and click on [Intranet/Internet Interface](#).



The screenshot shows the homepage of Satisfaction Software. On the left is a green navigation menu with links: Home, About Us, What's New, Products, Services, Support, and Contacts. The main content area features the company logo (a stylized 'S' in a green hexagon) and the text 'satisfaction software'. Below this is a 'Welcome to Satisfaction Software' heading, followed by a paragraph describing their integrated accounting and operations systems for various industries. A section titled 'Introducing infoware services!' promotes their full suite of business management software. At the bottom, there is a link to a demonstration of the 'Intranet/Internet Interface'.

Home
About Us
What's New
Products
Services
Support
Contacts

 **satisfaction software**

Welcome to Satisfaction Software

Providers of integrated, fully customisable accounting and operations information systems. Solutions for all industries including: [wholesale](#), [retail](#), [manufacturing](#), [warehousing](#), [transport](#), [construction](#) and [service](#) industries.

Introducing [infoware services](#)!

Want all the benefits of the full **infoware** suite of integrated business management software with **NO** major hardware or software investment?
[Find out more...](#)

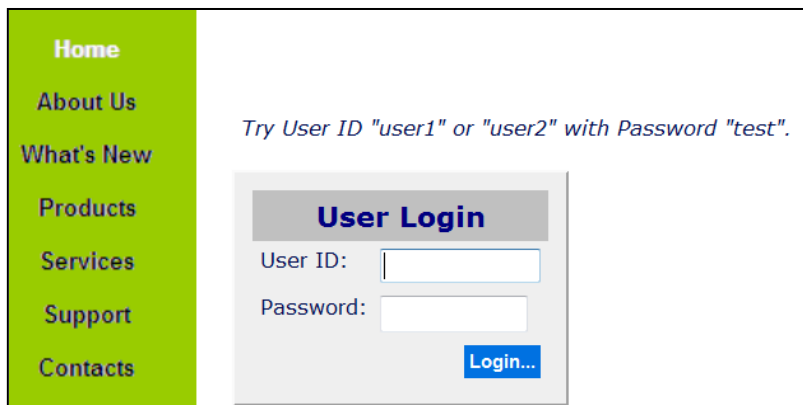
Try a demonstration of our [Intranet/Internet Interface](#) querying live data in "real time" from your database!

2. Login

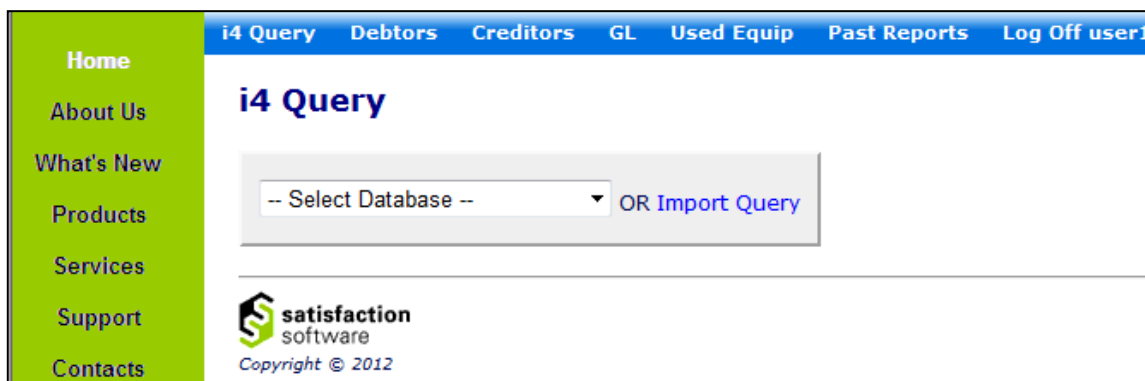
You need to provide a login name and password to gain access to your list of **infoware**'s i4 browser applications including i4Query.

If test driving from www.satsof.com.au then enter “**user1**” into “*User ID:*” field and “**test**” into “*Password:*” field then click the “Login” button.

If accessing your own server, enter a valid user name and password. If you do not know your login and password see your system administrator.



Depending on your access, the menu bar at the top of the page displays a number of **infoware**'s applications. Select the **i4 Query** option.



3. Tutorial

3.1 Select Database & Fields

Your system administrator controls the list of database files that you have access to. Due to security reasons most users will NOT have access to all database files.

Naming conventions of infoware file names are:

Prefix	Database
bm	Bill of materials
cb	Cash Book
cr	Creditors
db	Debtors
fa	Fixed Asset
gl	General Ledger
iv	Inventory
jc	Job cost
py	Payroll
sy	System Wide
tm	Transware
wm	Warehousing

File Type	Description
mast	Master file (except GL Chart of accounts is called glchart).
tran	Transaction file
prm	1 record parameter file
work	Work file of unconfirmed transactions (unless multiple files per application)
branch	Branch Maintenance {8,2}
company	Company Maintenance {8,1}

Example:

Debtor transaction file is called **dbtran**.

Job Cost Master file is called **jcmast**.

Handy Hint

In many infoware applications there are specific ‘one off’ files. The file name is always displayed on the bottom left hand side of the selection set screen.

Selections sets:-

- are normally displayed when running reports

OR

- in data entry select 2 Scan for Records, then select 2 Extended Selection

Choose Record Operation
1 - Record Number 2 - Scan For Records 3 - Add Records 4 - Index Selection 5 - Toggle Browse Mode Browse is ON 6 - Fuzzy Search X - Exit F10 - Help
Enter Selection > 2

Scan For Records
1 - Short Selection 2 - Extended Selection 3 - Clear Selection X - Exit F10 - Help
Enter Selection > 2

Filename appears on bottom left-hand side of selection set screen.

Group	Field	Heading	Rel	Value
.
.
.

Filename

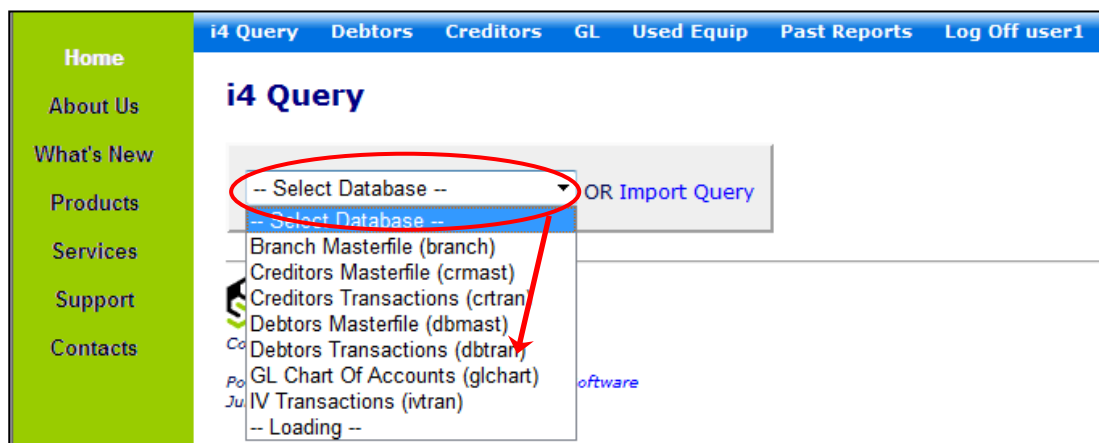
Selector Sentence:

File: **pycodes**

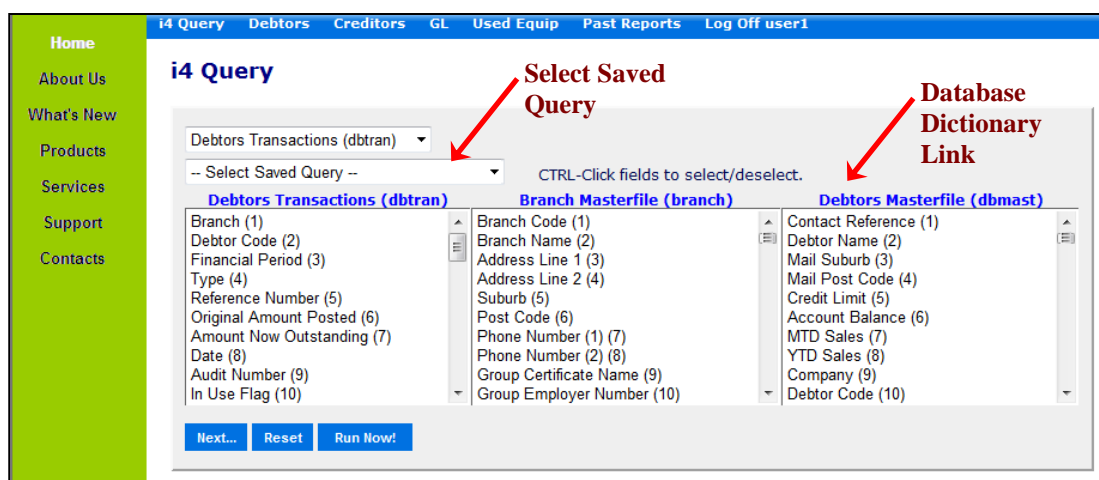
Enter Selection >

i4Query allows you to choose the primary database table to query. Selecting the down arrow will show the database files that can be accessed.

Before constructing a query, you need to think about what is the lowest level of detail that you require and choose that database file as the primary database to query. Other related databases will be available which have some reference code within the primary database selected. E.g. you wish to display debtor invoices for specific debtors. The invoices are the main data for the query so the Debtors Transactions file would be the primary database for the query, which is linked back to the Debtors Masterfile.



In this example select “Debtors Transactions (dbtran)”.



Once the Database file “Debtors Transactions” has been selected, i4Query refreshes to show the available database files and fields to select. Logically joined files are automatically listed. In this example as you are querying the Debtor Transaction file, you may also wish to select fields from the Branch Masterfile (e.g. branch name) and Debtors Masterfile (e.g. debtor name, account balance, debtor phone number etc).

3.2 Select Saved Query

“**Select Saved Query**” selection box provides access to load previously saved queries. Any changes made to previously saved queries are temporary unless you save the changes (last step in i4Query).

Handy Hint

The standard Windows mouse click options for selecting fields apply.

To select a **contiguous range** of fields <click> on the first desired field and <Shift-click> on the last field. (This option should be performed before all other field selections, as range selections will clear all other field selections in the database table).

<Ctrl-click> on individual fields to select **multiple** fields.

To De-select a chosen field then <Ctrl-click>

In this example from the Debtor Transaction table select fields 1 to 8 (Branch, Debtor Code, Financial Period, Type, Reference Number, Original Amount Posted, Amount Now Outstanding and Date fields).

From the Debtor Masterfile table, select Debtor Name and Telephone fields.

3.3 Online Data Dictionary

Handy Hint

Online Data Dictionary - Option to view screen formats

i4 Query lists all the fields available for each of the database tables relating to the initial table selected. Above each of these lists is the database name (e.g. “*Debtor’s Master file*”).

A challenge on some of the files with a large number of fields (especially master files) is trying to find the desired fields.

An easy option to find a field(s) in a database file is to click on the Database name link at the top of the field list e.g. by clicking **Debtors Master (dbmast)**. i4Query opens a new window with the **data entry screens** for the Debtors master file with the field numbers displayed (*see screen below*).

Screen Formats - Debtors Masterfile

Screen No: 1 | 2 | 3 | 4 | 5 | 8

Screen 1		
DEBTOR ACCOUNT MAINTENANCE		
Company.....: %9	Debtor Code.....: %10	Notes: !936
Name.....: %2		ABN: *927
Postal Address		Physical Address
*41	*208	
*42	*209	
*3	*4	*210
		*211
Contact.....: *1	Sort Invoices By: *926	Fuel Surcharge %.: *934
Telephone.....: *43	Alt.Distribution	Dsc: *935
Fax Number....: *205	Entry.....: *575	-----+
Statemnt Type: *220	Sales Anal. A...: *33*34	Marked to Delete !14
Trading Terms: *11	Sales Anal. B...: *35*36	Balance...: !6
Credit Limit..: *5		Current...: !47
Credit Stop...: *56		30 Days...: !44
Debtor Group.: *222		60 Days...: !45
Bill to Debtr: *215		90 & Over: !46
		Open Bal...: !221
Establishmt Db: *659		MTD Sales: !7
Mail List Code: *15	Last Connote Number !937	YTD Sales: !8
Geo Locn Code.: *16	Last No of Connotes Printed !938	-----+



The data entry screens are listed exactly as they appear in **infoware**. i4 Query reads the same screen files as **infoware** to list the fields. It shows the application screens numbered 1-8 that are available for the Debtors Masterfile in this example.

This can be used to find a field within **infoware**, as you know where it appears on the **infoware** screen. The field numbers are prefixed by either:-

- * - an asterisk (optional field)
- ! - exclamation mark (display only field that cannot be edited on this screen), or
- % - a percentage sign (a mandatory field)

In the above example, Telephone is field 43.

Having obtained the field number from this window you can **close this window** and return to the i4Query screen. You can then select the appropriate field(s) from that database table.

After you have selected the required fields, i4Query should appear as follows with the selected fields highlighted.

The screenshot shows the i4 Query application window. On the left is a green sidebar with navigation links: Home, About Us, What's New, Products, Services, Support, and Contacts. The main window has a blue header with the title 'i4 Query' and a menu bar with options: i4 Query, Debtors, Creditors, GL, Used Equip, Past Reports, and Log Off user1. Below the header, there's a dropdown menu for 'Debtors Transactions (dbtran)' and a 'Select Saved Query' dropdown. A instruction 'CTRL-Click fields to select/deselect.' is present. Three tables are displayed side-by-side: 'Debtors Transactions (dbtran)', 'Branch Masterfile (branch)', and 'Debtors Masterfile (dbmast)'. The 'Debtors Masterfile (dbmast)' table has 'Telephone (43)' highlighted in blue. At the bottom of the tables are buttons for 'Next...', 'Reset', and 'Run Now!'.

The quickest way to select a range of fields in the example is:

In Debtor Transaction table,

<Click> on first field – Branch.

<Shift> <click> on last field in range – Date.

In Debtors Masterfile table,

<click> on table “Debtors Masterfile” link to find the Telephone field is field 43 in data dictionary. Close Screen Formats window.

<click> first field (Debtor Name (2)) then scroll down to Telephone (43) field and <ctrl><click>.

Handy Hint

3 ways to navigate using the scroll bar are:

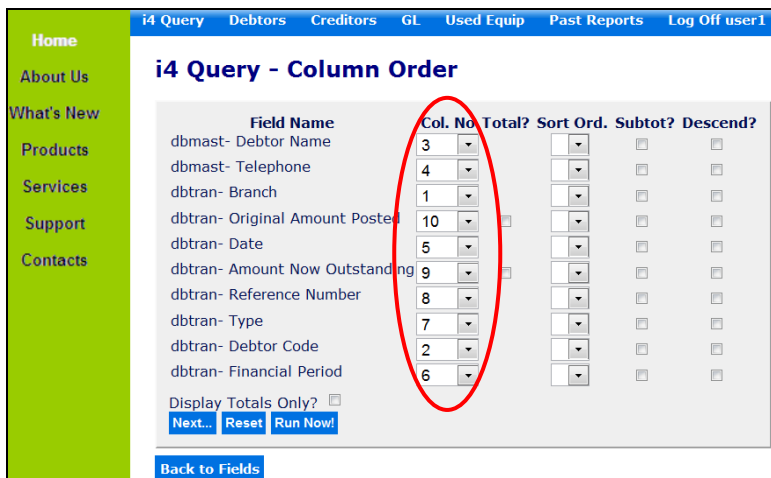
- click on up or down arrow and it will take you back or forward 1 line
- click above or below scroll cursor and it will jump you back or forward 1 screen
- drag scroll cursor to approximately where you wish to be in data table.

IMPORTANT:

You must select all fields that you want to display **OR** that you wish to use in your selection criteria. Once you have selected all the fields you wish, click on the [Next] button under the list of fields. Alternatively, if you have loaded a saved i4Query, or you want to select all data from a file (very rare!), you can also click on the [Run Now!] button to execute the query immediately.

3.4 i4Query Column Order

The **i4Query Column Order** screen will then be displayed:



Field Name	Col. No	Total?	Sort Ord.	Subtot?	Descend?
dbmast- Debtor Name	3			<input type="checkbox"/>	<input type="checkbox"/>
dbmast- Telephone	4			<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Branch	1			<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Original Amount Posted	10	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Date	5			<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Amount Now Outstanding	9	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Reference Number	8			<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Type	7			<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Debtor Code	2			<input type="checkbox"/>	<input type="checkbox"/>
dbtran- Financial Period	6			<input type="checkbox"/>	<input type="checkbox"/>

Display Totals Only? ☐

Next... Reset Run Now!

Back to Fields

i4Query lists all the fields selected. Against each field will be a Column Number which can be changed. These numbers indicate the column order in which the fields will be listed across the page of the result. Change the order of the columns to the order above.

If there are 2 fields with the same column number, i4Query will decide which field is listed first, and the other field(s) with the same column number will be listed immediately following.

Handy Hint

While i4 Query will display fields with the same column number after each other, it is mandatory that the column numbers are unique if you are going to use i4 Query in i4 Excel plugin. More than 1 field with the same column number may list in a different order when i4 Query is run at different times. This will cause issues in i4 Excel plugin if the order of each field keeps changing.

There is a special Column Number “**Hide**” as an available option. If you select the Col No *Hide* then i4Query allows you to define selection criteria using this field (next screen) but does not display this field on the *Results* page. An example would be a query for all debtors on stop credit. As each debtor selected will have its Stop Credit field equal to “Y” it may be distracting to have the Stop Credit field listed in the results since it always has the same field value.

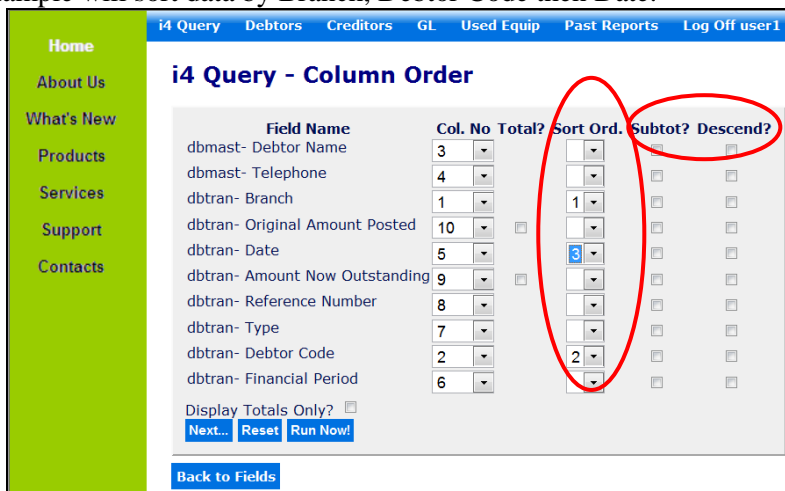
Total box option if ticked will total this column automatically. The Total option appears next to numeric fields only.

Display Totals Only? option if ticked will only display the totals of the columns marked to total. No detail data from the records selected will be displayed. This provides a summary option for records selected.

3.5 Sort Order

The results of i4 Query will not be sorted – unless you specifically define the sort order.

The following example will sort data by Branch, Debtor Code then Date.



Field Name	Col. No	Total?	Sort Ord.	Subtot?	Descend?
dbmast- Debtor Name	3				
dbmast- Telephone	4				
dbtran- Branch	1		1	<input type="checkbox"/>	
dbtran- Original Amount Posted	10	<input type="checkbox"/>			
dbtran- Date	5		3	<input type="checkbox"/>	
dbtran- Amount Now Outstanding	9	<input type="checkbox"/>			
dbtran- Reference Number	8			<input type="checkbox"/>	
dbtran- Type	7			<input type="checkbox"/>	
dbtran- Debtor Code	2		2	<input type="checkbox"/>	
dbtran- Financial Period	6			<input type="checkbox"/>	

Display Totals Only? ☐

Next... Reset Run Now!

Back to Fields

Handy Hint

If the result is going to be more than 2000 records and the end result is going to be viewed in Excel, then it will be more efficient to sort the results in Excel and leave the Sort Order blank. Sort Orders are effective for defining the sort order for smaller lists such as lists of debtors, employees etc., or producing your own subtotalled reports from within i4 Query.

3.5.1 Subtotal

Sometimes you may wish to subtotal records e.g. subtotal a list of invoices by branch and debtor. If you wish to do this, then tick the Subtotal field for these fields. You will also need to define Sort Order fields as these will usually be the same as the Subtotal fields.

If you are going to use Excel's pivot tables then do NOT select any subtotal fields.

3.5.2 Descend

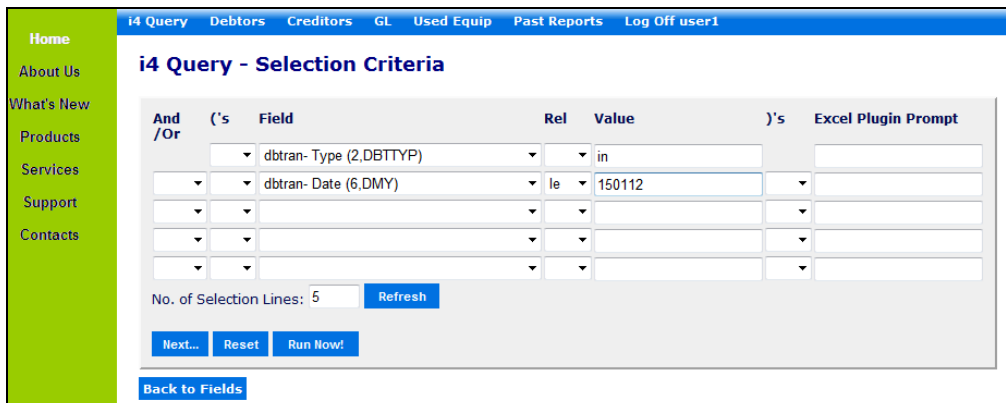
If you sort on any fields, the results will be sorted in ascending order [0-9, a-z].

By selecting the "Descend?" option for any Sorted field, then this field will be sorted in Descending order [z-a, 9-0] instead.

Once you have made changes required, click the [Next] button to proceed.

3.6 i4Query – Selection Criteria

The **i4Query – Selection Criteria** screen will then be displayed.



This page allows you to define the selection criteria for this query *e.g. selecting only invoices before a given date*. By default you are allowed 5 selection lines. If you need more lines, change the **Number of Selection Lines** field accordingly and select [**Refresh**]. A maximum of 99 lines may be used for a query.

By default, the selection lines are joined by the ‘AND’ condition which means that all Selection Criteria lines must be satisfied for a record to be selected. If you wish to check for *either* a condition A or a condition B, you may join the lines using the ‘OR’ condition by selecting ‘OR’ from the ‘AND/OR’ column. If it is left blank, i4Query assumes the condition is ‘AND’.

The next column allows you to **define brackets** to join lines together. For example, a more complex query may require a debtor code = A and a transaction type = IN (for invoice), or a debtor code = B and transaction type CH for cheque. You would have an open bracket prior to the debtor code lines and closing brackets after the transaction type values. This would then give you a report of all debtor A’s invoices and debtor B’s cheques.

In the **field column** you will need to select the field that you wish to compare. The size of the field and the type of data type is shown in parentheses after the field name.

Note: the fields previously selected are the only fields that can be queried.

The **‘Rel’ column** sets the “relationship” of the Fields to the value entered. The following are options available to specify a relationship, with an example using dates:-

REL	DESCRIPTION
eq or blank	Equals to (the same as, but only for as many characters as entered if a text field)
ne	Not equal to (different)
lt	Less than (lower than)
le	Less than or equal to (lower than or the same as)
gt	Greater than (higher than)
ge	Greater than or equal to (higher than or the same as)
co	Contains (searches if field contains the value anywhere in the field)

The following calendar examples show how each of the ‘**Rel**’ **column** options will select data. This also applies to numeric and alpha fields. Dates are in DDMMYY format.

Using the **EQ** or **blank** option, such as “EQ 160112” will only select data for the date 16th January 2012. For example:

December 2011							January 2012							February 2012						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3	1	2	3	4	5	6	7				1	2	3	4
4	5	6	7	8	9	10	8	9	10	11	12	13	14	5	6	7	8	9	10	11
11	12	13	14	15	16	17	15	16	17	18	19	20	21	12	13	14	15	16	17	18
18	19	20	21	22	23	24	22	23	24	25	26	27	28	19	20	21	22	23	24	25
25	26	27	27	29	30	31	29	30	31					26	27	28				

Using the **NE** option, such as “NE 160112” will select all days except for the 16th January 2012. For example:

December 2011							January 2012							February 2012						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3	1	2	3	4	5	6	7				1	2	3	4
4	5	6	7	8	9	10	8	9	10	11	12	13	14	5	6	7	8	9	10	11
11	12	13	14	15	16	17	15	16	17	18	19	20	21	12	13	14	15	16	17	18
18	19	20	21	22	23	24	22	23	24	25	26	27	28	19	20	21	22	23	24	25
25	26	27	27	29	30	31	29	30	31					26	27	28				

Using the **GT** option, such as “GT 160112” will select data after the specified date. For example:

December 2011							January 2012							February 2012						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3	1	2	3	4	5	6	7				1	2	3	4
4	5	6	7	8	9	10	8	9	10	11	12	13	14	5	6	7	8	9	10	11
11	12	13	14	15	16	17	15	16	17	18	19	20	21	12	13	14	15	16	17	18
18	19	20	21	22	23	24	22	23	24	25	26	27	28	19	20	21	22	23	24	25
25	26	27	27	29	30	31	29	30	31					26	27	28				

Using the **GE** option, such as “GE 160112” will select data after and including the specified date. For example:

December 2011

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	27	29	30	31

January 2012

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

February 2012

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

Using the **LT** option, such as “LT 160112” will select data before the specified date. For example:

December 2011

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	27	29	30	31

January 2012

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

February 2012

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

Using the **LE** option, such as “LE 160112” will select data before and including the specified date. For example:

December 2011

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	27	29	30	31

January 2012

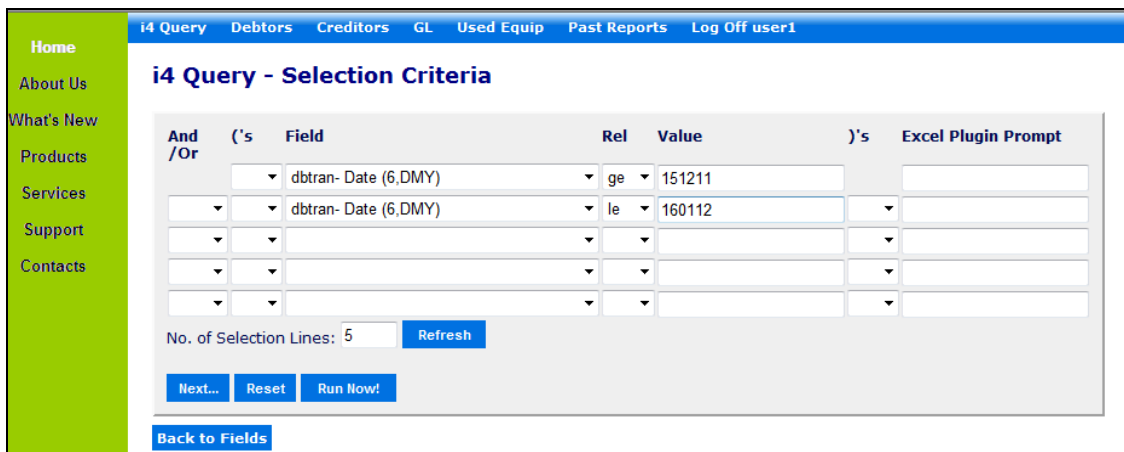
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

February 2012

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

3.6.1 How do I define a range?

For this example, we will define a range of dates from the 15th December 2011 to 16th January 2012. This is performed by entering two (2) lines on the **i4Query – Selection Criteria**.



Using the **GE** option, “GE 151211” will select data after and including the specified date.
Using the **LE** option, “LE 160112” will select data before and including the specified date.
Combined, these will select data for the dates below:

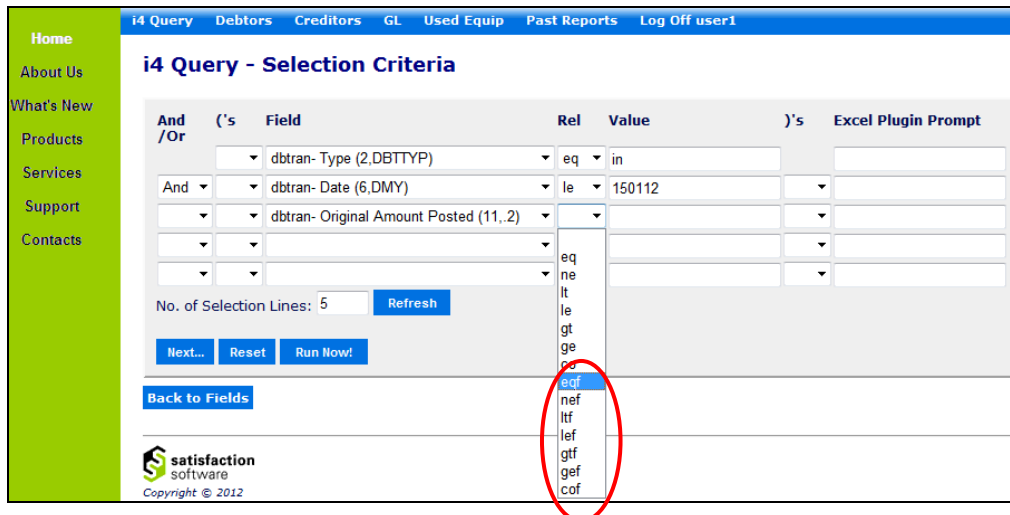
December 2011							January 2012							February 2012						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
				1	2	3	1	2	3	4	5	6	7				1	2	3	4
4	5	6	7	8	9	10	8	9	10	11	12	13	14	5	6	7	8	9	10	11
11	12	13	14	15	16	17	15	16	17	18	19	20	21	12	13	14	15	16	17	18
18	19	20	21	22	23	24	22	23	24	25	26	27	28	19	20	21	22	23	24	25
25	26	27	27	29	30	31	29	30	31					26	27	28				

WARNING: If your query produces a result with more than a few thousand lines then it may take your browser some time to display it. As a result the i4results page is limited to 5000 records [parameter setting]. When you select Convert to CSV or use i4 plugin options the FULL data result is supplied.

3.6.2 Comparing Two Fields

Normally a field is compared with a value e.g. a date [field] eq [relationship] 160112 [value].

Sometimes you may wish to compare two fields. Any relationship with an “f” at the end is comparing two fields rather than a field and a value.

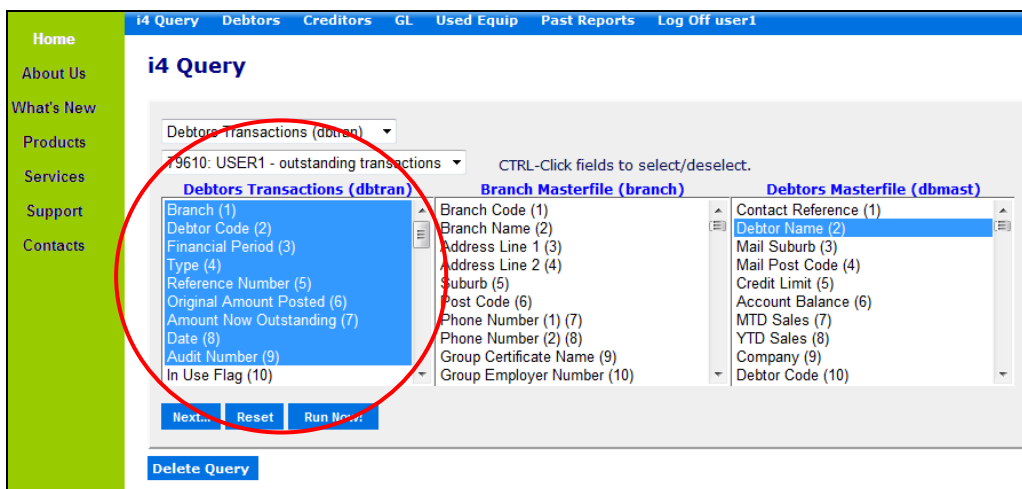


Example: both the debtors’ transaction [dbtran] and creditors’ transaction [crtran] data tables contain 2 fields – the transaction’s original amount and the amount currently outstanding. When a transaction is paid the amount outstanding is 0.00.

If you wish to display a list of PARTIALLY paid transactions you would enter Selection Criteria as follows:

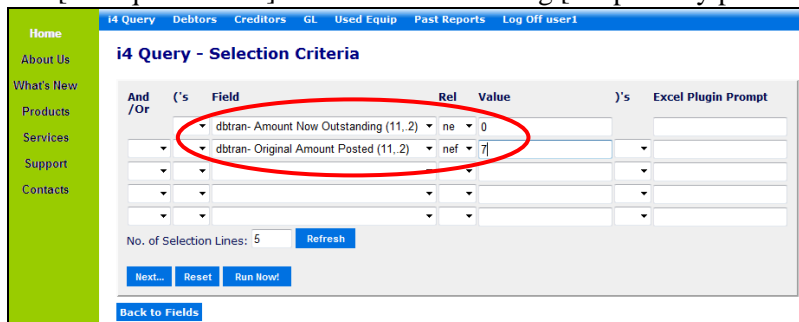
First, when you are comparing fields you **MUST KNOW THE FIELD NUMBER**. The field number is in brackets. In this example Amount Now Outstanding is field 7.

If you wish to compare to a field, the field in the Value Column must always be in the primary [main] data table, as you are entering the field you need to relate to first, in the Field Column which may be in a different data table.



The first line of the following Selection Criteria selects only transactions where the Amount Outstanding is “ne” 0 [i.e. transactions that are not fully paid].

The second line due to the relationship “*nef*” interprets the 7 as “field 7”. For example: Original amount posted “*nef*” [not equal to field] 7 Amount Outstanding [i.e. partially paid transactions].



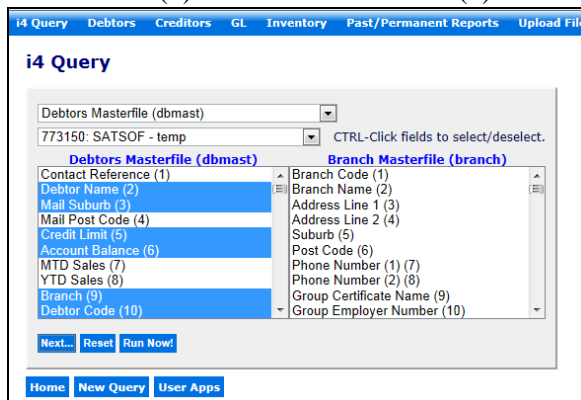
And /Or	's	Field	Rel	Value	's	Excel Plugin Prompt
		dbtran- Amount Now Outstanding (11,2)	ne	0		
		dbtran- Original Amount Posted (11,2)	nef	7		

No. of Selection Lines: 5 [Refresh](#)

[Next...](#) [Reset](#) [Run Now!](#)

[Back to Fields](#)

Other examples of comparing 2 fields in infoware include: List Debtors where account balances > Credit limit. Fields are Credit Limit (5) and Account Balance (6)



i4 Query

Debtors Masterfile (dbmast) [CTRL-Click fields to select/deselect.](#)

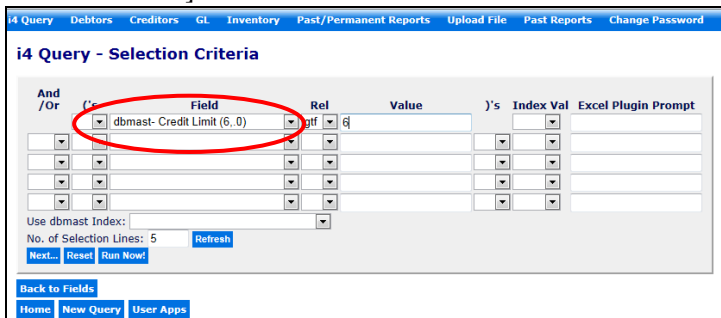
773150: SATSOF - temp

Debtors Masterfile (dbmast)	Branch Masterfile (branch)
Contact Reference (1)	Branch Code (1)
Debtor Name (2)	Branch Name (2)
Mail Suburb (3)	Address Line 1 (3)
Mail Post Code (4)	Address Line 2 (4)
Credit Limit (5)	Suburb (5)
Account Balance (6)	Post Code (6)
MTD Sales (7)	Phone Number (1) (7)
YTD Sales (8)	Phone Number (2) (8)
Branch (9)	Group Certificate Name (9)
Debtor Code (10)	Group Employer Number (10)

[Next...](#) [Reset](#) [Run Now!](#)

[Home](#) [New Query](#) [User Apps](#)

The following Selection Criteria selects records where Credit Limit “*gtf*” [greater than field] field number 6 [Debtor Account Balance].



And /Or	's	Field	Rel	Value	's	Index Val	Excel Plugin Prompt
		dbmast- Credit Limit (6,0)	gtf	6			

Use dbmast Index: [Refresh](#)

No. of Selection Lines: 5 [Refresh](#)

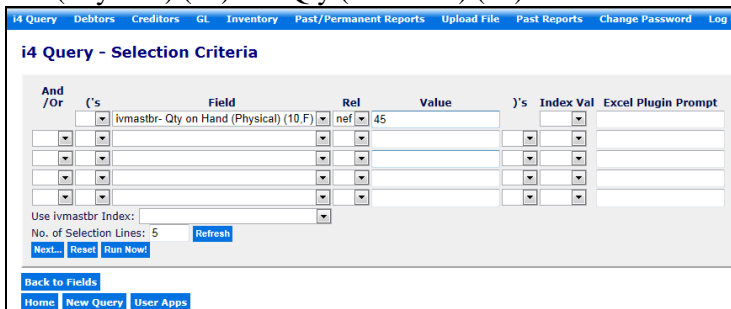
[Next...](#) [Reset](#) [Run Now!](#)

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In data table IV Branch Stock Items (ivmastbr), you may wish to list products where physical and financial quantities differ [i.e. products where there are outstanding deliveries not yet matched against a supplier’s invoice].

Fields are Qty on Hand (Physical) (19) and Qty (Financial) (45).



And /Or	's	Field	Rel	Value	's	Index Val	Excel Plugin Prompt
		ivmastbr- Qty on Hand (Physical) (10,F)	nef	45			

Use ivmastbr Index: [Refresh](#)

No. of Selection Lines: 5 [Refresh](#)

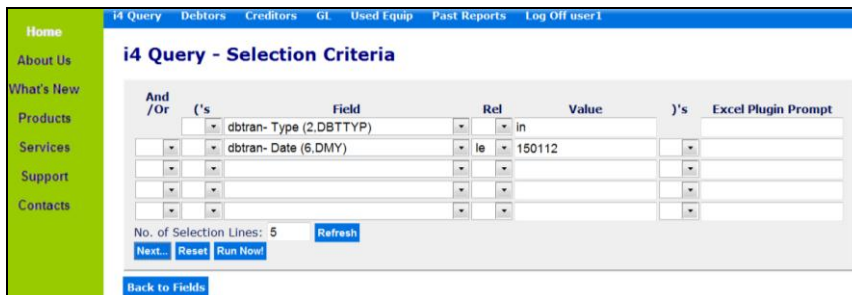
[Next...](#) [Reset](#) [Run Now!](#)

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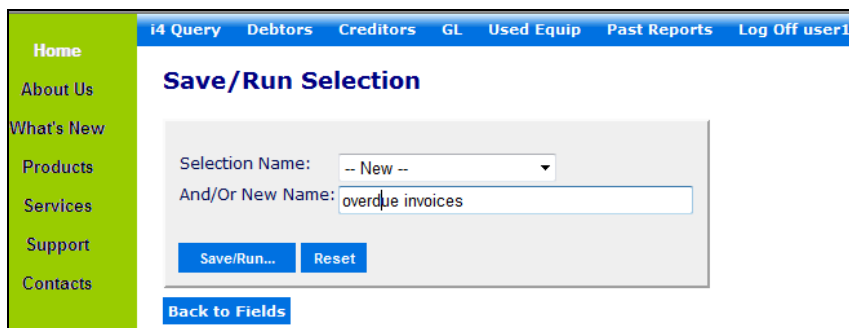
Once you have entered all the selection criteria for the report, click on the [Next] button to move to the Save/Run selection screen.

Going back to our example, your screen should look like this before you click [Next].



3.7 Save/Run Selection

The following example is being saved under a new name “overdue invoices”



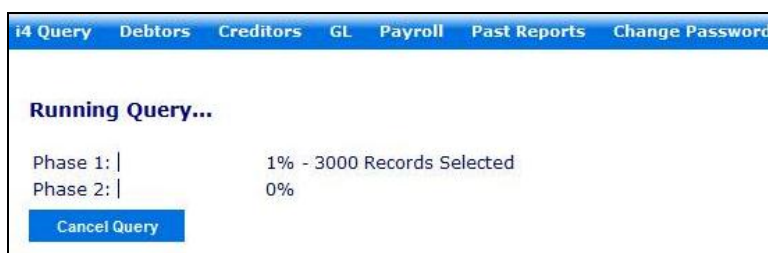
Having defined the selection criteria for this query, it is possible to save the query with a name. This allows you to load the criteria and rerun (optionally changing the query) for later queries.

Before running this query, your options are:-

- If you don't wish to save the query then just leave the Name field blank and click the [Save/Run] button to continue.
- If you do wish to **save the query**, enter a new name in the '**And/Or New Name**' field.
- If you wish to overwrite an already saved query, select the existing query from the '**Selection Name**' box and optionally give it a new name. You cannot overwrite queries created by other users.

Once you have selected an existing Selection Name or entered a new name then click the [Save/Run] button to save the selection and run the query.

The '**Running Query**' screen will refresh with a percentage value completed to show the progress while running the query. Once the query has started running, a [Cancel Query] button is displayed if you wish to cancel this Query and start another.



3.8 i4Query Result

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i4 QueryDebtorsCreditorsGLUsed EquipPast ReportsLog Off user1

i4 Query - overdue invoices

Selection Criteria

User: user1

Date: 23/07/12

Time: 14:18:54

Download CSVExcel PluginExport QueryRefine Query

Col: 1

Debtor Code

Debtor Name

Telephone

Date

Financial Period

Type

Reference Number

Amount Now Outstanding

Original Amount Posted

Col: 2

ACTPRO

Action Products

(07) 32684722

25/01/02

200001

IN

6

1441.00

Col: 3

ACTPRO

Action Products

(07) 32684722

08/04/02

200201

IN

inv02

150.00

450.00

Col: 4

BIGCUS

Big Customer

(02) 9345665

22/01/02

200001

IN

9

1622.50

1622.50

Col: 5

BIGCUS

Big Customer

(02) 9345665

25/01/02

200001

IN

5

3591.50

3591.50

Col: 6

BIGCUS

Big Customer

(02) 9345665

25/01/02

200001

IN

10

2090.00

Col: 7

BIGCUS

Big Customer

(02) 9345665

25/01/02

200001

IN

11

2546.50

2546.50

Col: 8

TOPBUY

Top Buyer

(07) 4345123

22/01/02

200001

IN

8

2255.00

2255.00

Col: 9

TOPBUY

Top Buyer

(07) 4345123

25/01/02

200001

IN

7

1045.00

1045.00

Col: 10

TOPBUY

Top Buyer

(07) 4345123

25/01/02

200001

IN

12

1100.00

1100.00

Hide

TOPBUY

Top Buyer

(07) 4345123

25/01/02

200001

IN

9 Matching Records Found

Download CSVExcel PluginExport QueryRefine Query

After the query is completed, the ‘i4Query Result’ is listed. You can click the ‘Selection Criteria’ link (at top of page) to see the selection criteria used to produce this query.

At the top of each column is a Column No selection box (this will not appear if you have ticked the Total or Subtotal boxes under section 3.4 or 3.5.1) and the Field name.

Column No List: by selecting the down arrow button, a list of available column numbers will be displayed. Selecting another column will move this column to a new position. This is a temporary change to the Results page. The original i4Query does not have its field column order changed. Make permanent changes to the column order when defining the query on the Column Order page.

If the “**Hide Column**” option is chosen the column is then hidden on results page but the data still remains in results page (just not visible). If the user presses the **Refresh** option, the hidden column will reappear. Similarly if the Download CSV option is selected to transfer data into spreadsheet, the hidden column data will be included. This is important to understand if emailing an i4Query results page that may have hidden column data that is confidential – it may “re-appear” if ‘Refresh Page’ or ‘Download CSV’ option is chosen. The correct method if you wish to completely stop a field from showing on the results page is to use the “Hide” column number on the *i4Query Column Order page* not the *Hide Option on i4Query Results page*.

Field Name: The order of the initial Results data is not sorted unless you have defined a Sort Order [see Section 3.5]. Clicking on one of the field name links will dynamically sort the data by that column value. Example below has now been sorted by the “Debtor Name”.

The Results page can be sorted in **multiple order of reverse precedence**. If you wish to sort the Results page in order of Debtor Code, Type and Date then click on each column Field header once in the reverse order: Date, Type, Debtor Code.

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i4 Query - overdue invoices

Selection Criteria

User: user1

Date: 23/07/12

Time: 14:18:54

Download CSV

Excel Plugin

Export Query

Refine Query

Branch	Debtor Code	Debtor Name	Telephone	Date	Financial Period	Type	Reference Number	Amount Now Outstanding	Original Amount Posted
HS	ACTPRO	Action Products	(07) 32684722	25/01/02	200001	IN	6		1441.00
HS	ACTPRO	Action Products	(07) 32684722	08/04/02	200201	IN	inv02	150.00	450.00
HS	BIGCUS	Big Customer	(02) 9345665	22/01/02	200001	IN	9	1622.50	1622.50
HS	BIGCUS	Big Customer	(02) 9345665	25/01/02	200001	IN	5	3591.50	3591.50
HS	BIGCUS	Big Customer	(02) 9345665	25/01/02	200001	IN	10		2090.00
HS	BIGCUS	Big Customer	(02) 9345665	25/01/02	200001	IN	11	2546.50	2546.50
HS	TOPBUY	Top Buyer	(07) 4345123	22/01/02	200001	IN	8	2255.00	2255.00
HS	TOPBUY	Top Buyer	(07) 4345123	25/01/02	200001	IN	7	1045.00	1045.00
HS	TOPBUY	Top Buyer	(07) 4345123	25/01/02	200001	IN	12	1100.00	1100.00

9 Matching Records Found

Download CSV

Excel Plugin

Export Query

Refine Query

If you click on the column header more than once then the data sort sequence toggles between **ascending** and **descending** order.

3.9 Speed Up Your i4 Query

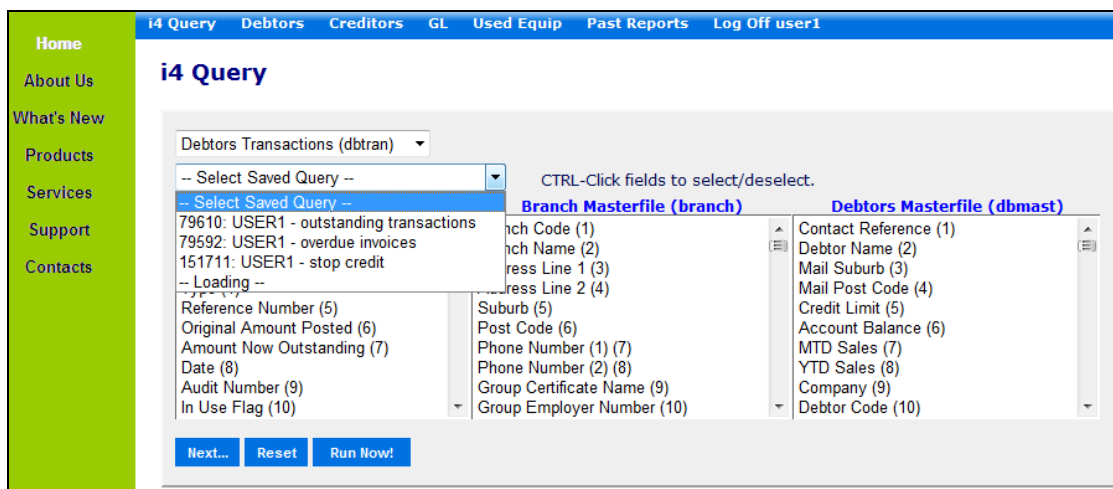
By default, i4 Query scans all records in the data table. Refer to the following link to speed up your i4 Queries (& i4 plugins):

http://www.satsof.com.au/infotip_9_Using_Indexes_in_i4Query.pdf

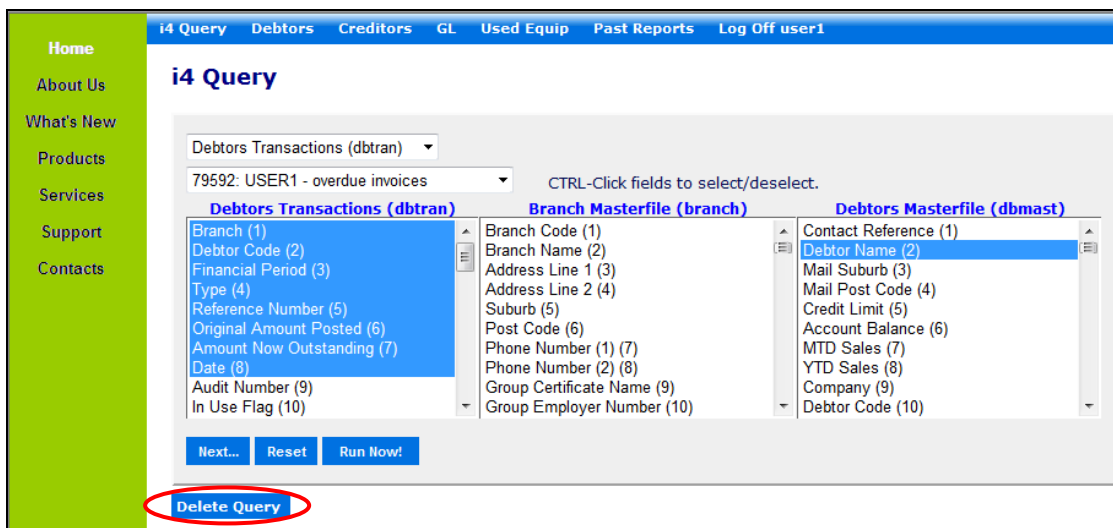
3.10 Delete i4 Queries

You may delete i4 Query(s) you have created. Any i4 Excel Plugins created from this query will fail after the i4 Query is deleted.

Select the saved i4 Query:



Once the i4 Query is retrieved, then an option to Delete Query appears:



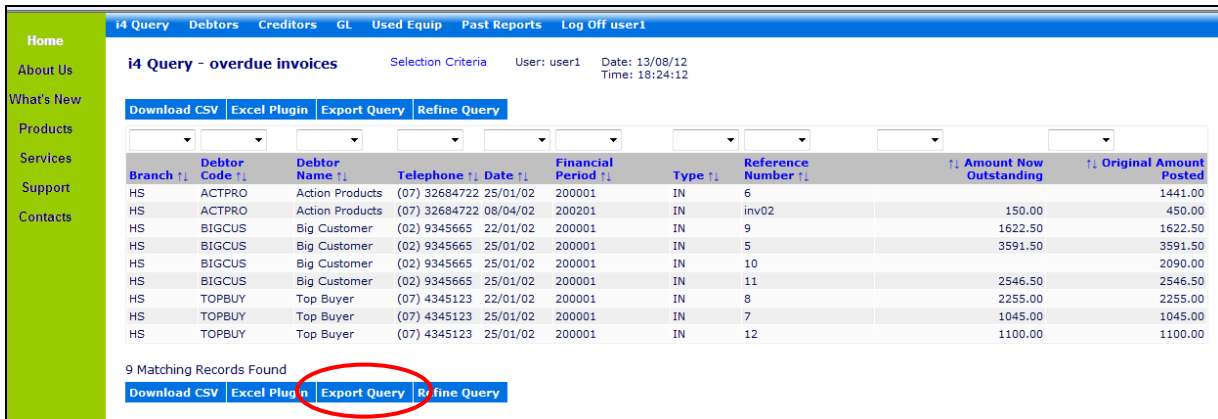
You can only delete i4 Queries created by yourself.

3.11 Copying i4 Queries

For **infoware** sites that run MULTIPLE Qualified areas you may wish to COPY an i4 Query definition from one qualified area to another.

Define i4 Query as per standard practice and select Run Now option.

On the results page there is an Export Query option.



Branch	Debtor Code	Debtor Name	Telephone	Date	Financial Period	Type	Reference Number	Amount Now Outstanding	Original Amount Posted
HS	ACTPRO	Action Products	(07) 32684722	25/01/02	200001	IN	6		1441.00
HS	ACTPRO	Action Products	(07) 32684722	08/04/02	200201	IN	inv02	150.00	450.00
HS	BIGCUS	Big Customer	(02) 9345665	22/01/02	200001	IN	9	1622.50	1622.50
HS	BIGCUS	Big Customer	(02) 9345665	25/01/02	200001	IN	5	3591.50	3591.50
HS	BIGCUS	Big Customer	(02) 9345665	25/01/02	200001	IN	10		2090.00
HS	BIGCUS	Big Customer	(02) 9345665	25/01/02	200001	IN	11	2546.50	2546.50
HS	TOPBUY	Top Buyer	(07) 4345123	22/01/02	200001	IN	8	2255.00	2255.00
HS	TOPBUY	Top Buyer	(07) 4345123	25/01/02	200001	IN	7	1045.00	1045.00
HS	TOPBUY	Top Buyer	(07) 4345123	25/01/02	200001	IN	12	1100.00	1100.00

9 Matching Records Found

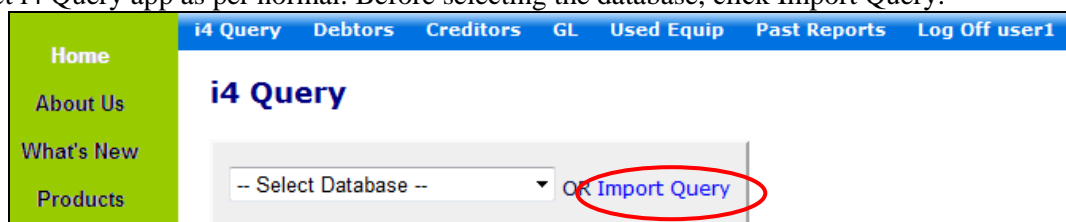
Select Export Query option.

Then select Save As option [click on Save Arrow] and save on your network [or PC]. NOTE the name of i4 Query export file.

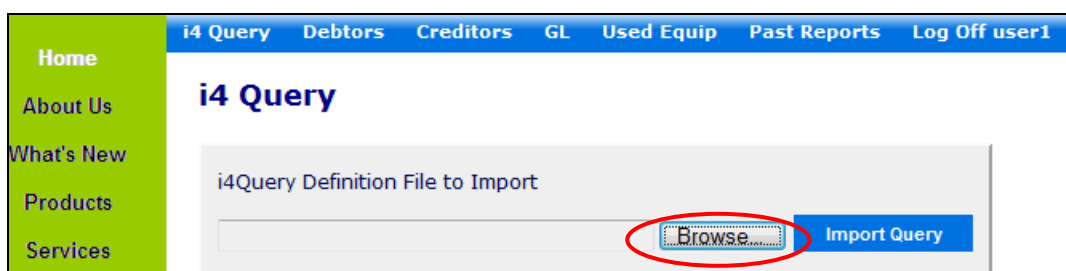


Now log off. Select URL for area you wish to copy to and log on to this area.

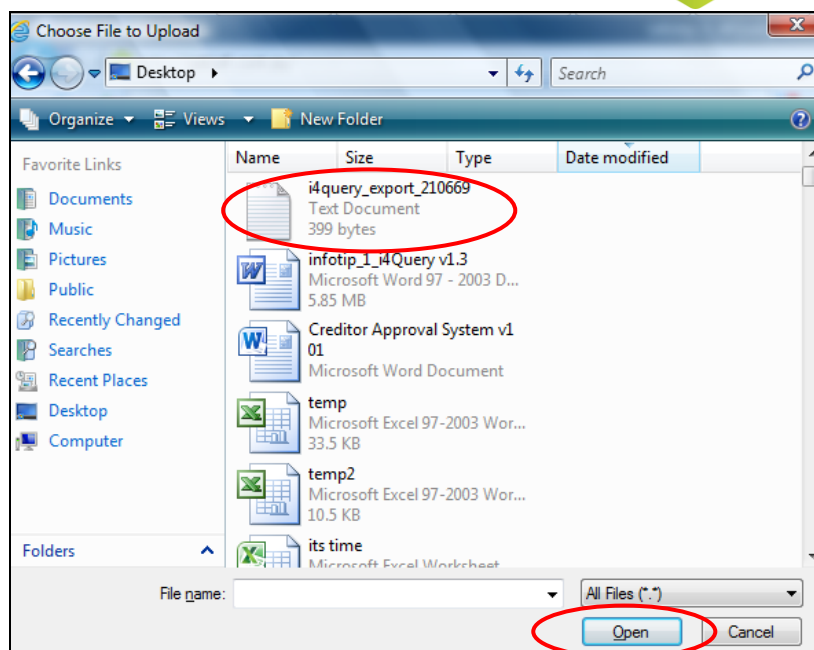
Select i4 Query app as per normal. Before selecting the database, click Import Query.



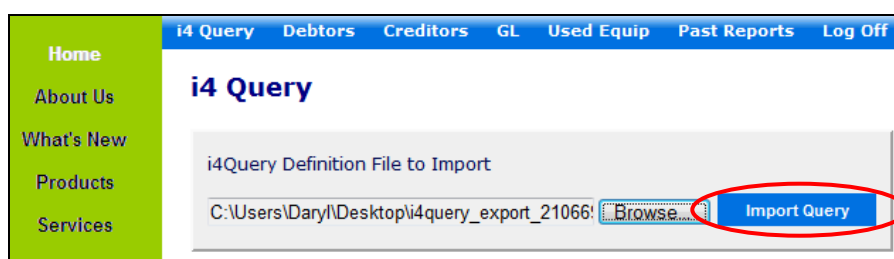
Then select browse.



Find the i4 Query definition just saved.



Click on the i4 Query definition then Open. Select Import Query option.



Congratulations! You have copied and now imported the i4 Query into another qualified area.

For sites that have multiple areas but are not fully qualified [e.g. ONE accounting area but different stock qualified areas for multiple business sites], contact Satisfaction Software for a technique in copying i4 Queries across partially qualified areas.

3.12 Import Results Page to Excel

The Results page can be printed, emailed and/or saved to your PC, as required. At the top and bottom of Results page are the following options:

[Download CSV](#) | [Refine Query...](#)

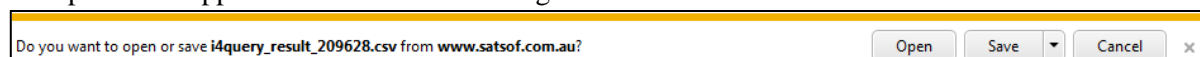
Refine Query

This selection allows you to refine the current query and takes you back to the field selection page in section 3.1.

Download CSV

If you click on the Download CSV (Comma Separated Values) link, i4Query will automatically convert the query result to a CSV file and download the file to your browser.

An option will appear similar to the following:

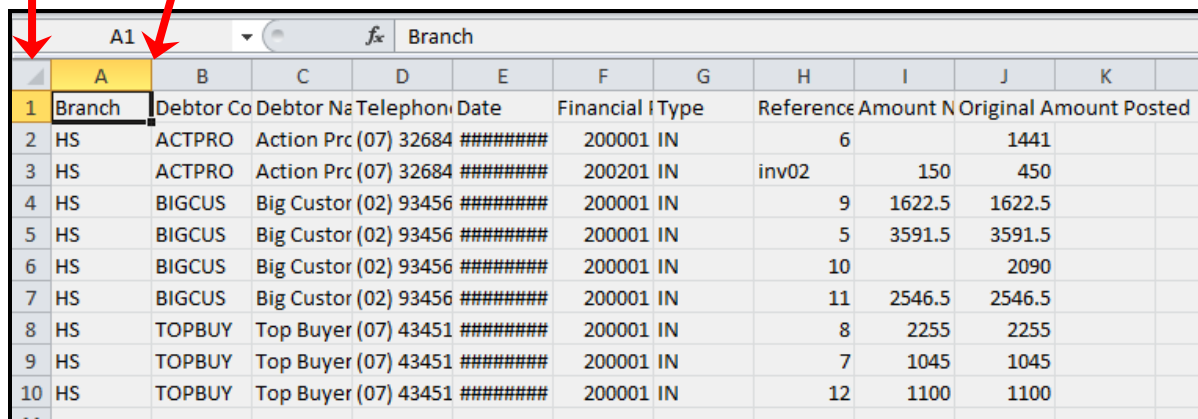


Select **Open** (as you trust this specific source) to automatically open the Query Result CSV file in Excel (assuming that Excel is the default application for CSV files on your PC), or **Save** the file.

Excel will automatically display the data using the existing fixed column width. This will result in some data fields not displayed. Large numeric fields may appear “#####” in cells. To re-size all columns to fit the data in the Excel spreadsheet:

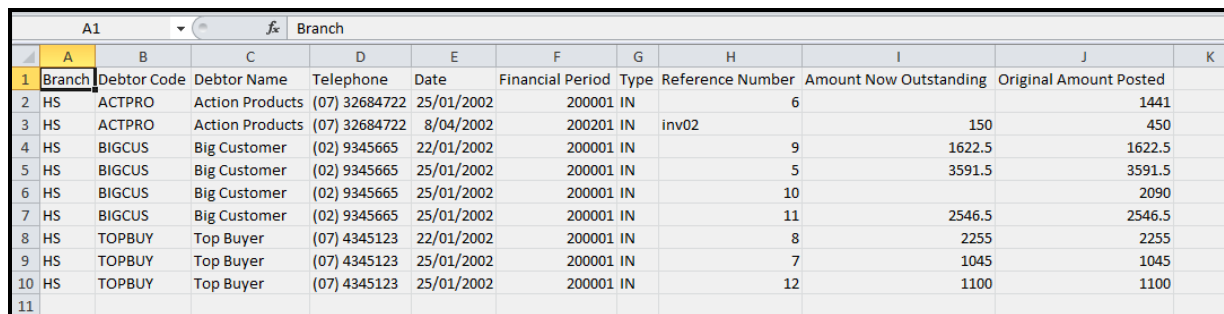
Click in A0 cell (highlights the whole spreadsheet)

Double click the column separator between Column headings A and B.



	A	B	C	D	E	F	G	H	I	J	K	L
1	Branch	Debtor Co	Debtor Na	Telephone	Date	Financial I	Type	Reference	Amount N	Original Amount	Posted	
2	HS	ACTPRO	Action Prc	(07) 32684	25/01/2002	200001	IN	6		1441		
3	HS	ACTPRO	Action Prc	(07) 32684	22/01/2002	200201	IN	inv02	150	450		
4	HS	BIGCUS	Big Custor	(02) 93456	25/01/2002	200001	IN	9	1622.5	1622.5		
5	HS	BIGCUS	Big Custor	(02) 93456	25/01/2002	200001	IN	5	3591.5	3591.5		
6	HS	BIGCUS	Big Custor	(02) 93456	25/01/2002	200001	IN	10		2090		
7	HS	BIGCUS	Big Custor	(02) 93456	25/01/2002	200001	IN	11	2546.5	2546.5		
8	HS	TOPBUY	Top Buyer	(07) 43451	22/01/2002	200001	IN	8	2255	2255		
9	HS	TOPBUY	Top Buyer	(07) 43451	25/01/2002	200001	IN	7	1045	1045		
10	HS	TOPBUY	Top Buyer	(07) 43451	25/01/2002	200001	IN	12	1100	1100		

The columns are now spread out to see all data.



	A	B	C	D	E	F	G	H	I	J	K
1	Branch	Debtor Code	Debtor Name	Telephone	Date	Financial Period	Type	Reference Number	Amount Now Outstanding	Original Amount Posted	
2	HS	ACTPRO	Action Products	(07) 32684722	25/01/2002	200001	IN	6		1441	
3	HS	ACTPRO	Action Products	(07) 32684722	8/04/2002	200201	IN	inv02	150	450	
4	HS	BIGCUS	Big Customer	(02) 9345665	22/01/2002	200001	IN	9	1622.5	1622.5	
5	HS	BIGCUS	Big Customer	(02) 9345665	25/01/2002	200001	IN	5	3591.5	3591.5	
6	HS	BIGCUS	Big Customer	(02) 9345665	25/01/2002	200001	IN	10		2090	
7	HS	BIGCUS	Big Customer	(02) 9345665	25/01/2002	200001	IN	11	2546.5	2546.5	
8	HS	TOPBUY	Top Buyer	(07) 4345123	22/01/2002	200001	IN	8	2255	2255	
9	HS	TOPBUY	Top Buyer	(07) 4345123	25/01/2002	200001	IN	7	1045	1045	
10	HS	TOPBUY	Top Buyer	(07) 4345123	25/01/2002	200001	IN	12	1100	1100	

3.13 User Restrictions to Fields

Restrictions can be placed on a user:

prevent access to specific field(s) e.g. prevent access to pay rate and amount in payroll transactions [but still have access to all other fields including hours]

restrict access to records based on field value(s) e.g. restrict access to inventory records only for a specific supplier [supplier can then have i4 plugins reviewing stock levels, sales data etc but securely lock down access so cannot view any other suppliers data].

Click on following for further details:

http://satsof.com.au/infotip_8_i4Query_Field_Level_Security.pdf

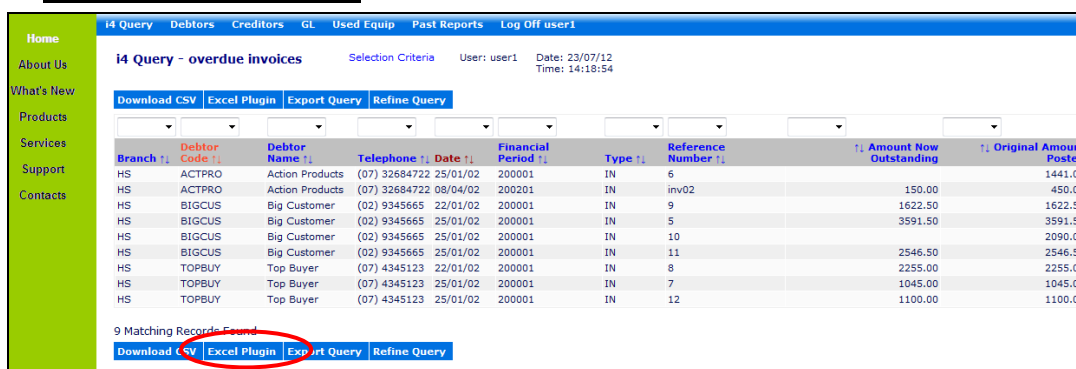
4. i4Query Plug-in To Excel Web Query

An exciting bit of **infoware** magic is that Excel spread sheets can refresh data across the web executing an i4 Query. This can be viewed and analysed via Excel's pivot tables. There's more on this in Handy Hints 5 and 10.

Excel can automatically execute an i4Query either when the spread sheet is opened or by selecting the Refresh Data option, using Excel's Web Query functions. The i4 Plugin embeds i4 Query within the Excel sheet. The queries can be fixed [provide list of all debtors on stop credit; list of current employees]; or variable – prompt(s) in Excel can pass requests back via embedded i4 Query to **infoware** to retrieve required transactions [all transactions for a nominated debtor; all transactions for nominated employee or user defined date range].

You must save your query definition before the Excel Plugin option is available.

4.1 Create Excel Plugin

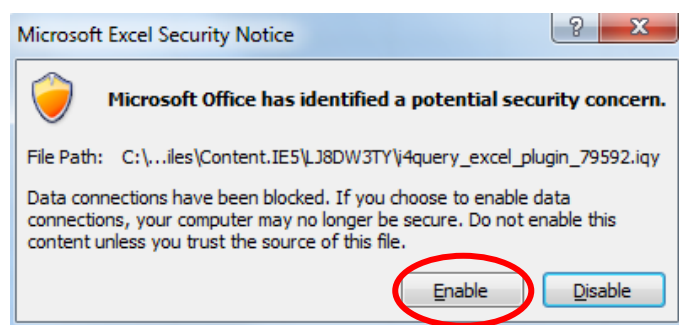


Select Excel Plugin

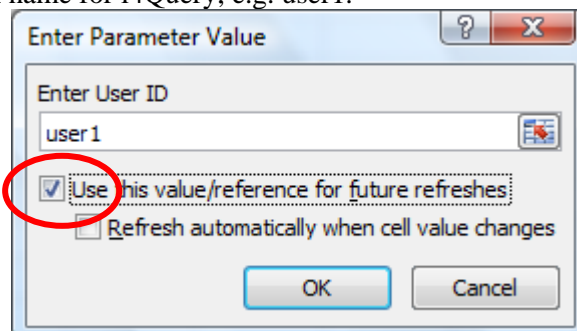


Select Open. i4 plugin will then automatically launch Excel.

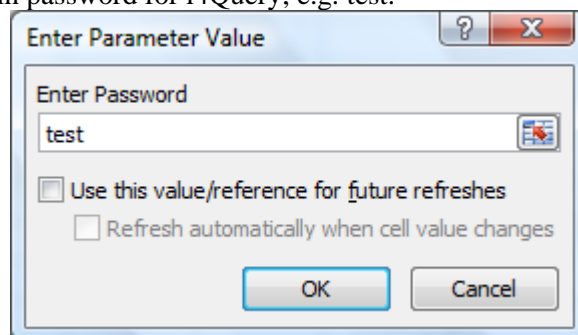
Select Enable



The User ID is your login name for i4Query, e.g. user1.



The Password is your login password for i4Query, e.g. test.



Executing the query via Excel will take the same time as it does to execute through i4Query.

The data will be automatically loaded into your spreadsheet.

Note: The check box "Use this value/reference for future refreshes" can be checked if you expect to re-run the query. Checking this saves you from having to re-enter the value again. **It is suggested that you do not check the "Password" Parameter Value as this is sensitive.** This will force users opening the Excel spreadsheet to enter the i4Query password each time it is run. Also note that the password is shown as text, it is NOT protected from others while you type it in. Do not enter it while others are watching.

Handy Hint

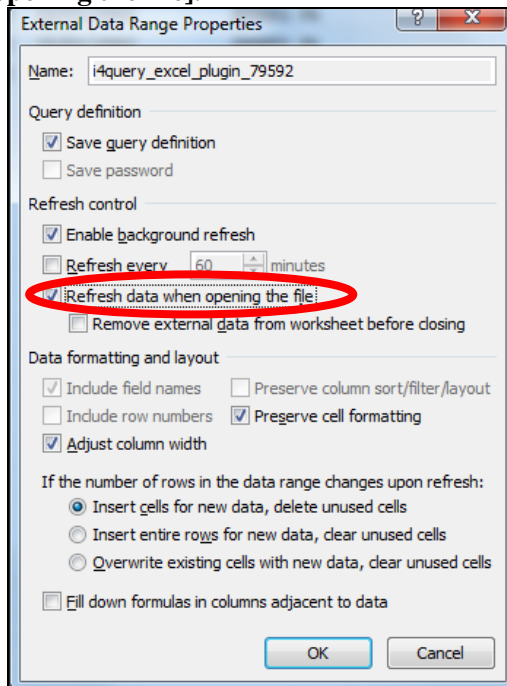
For general use amongst many people, it is recommended you create specific i4 Browser users with access only to i4Query and limited access to files, i.e. a different user for Debtors to Payroll. Make each user's password different.

The final step is you can tell Excel to execute this query on opening the spreadsheet. If you do not wish this to happen, but only be refreshed when you press the refresh button, then skip this step.

Right-click anywhere on the resultant data and select **[Data Range Properties]**.

Branch	Debtor Code	Debtor Name	Telephone	Date	Financial Period	Type	Reference Number	Amount Now Outstanding	Original Amount Posted
HS	ACTPRO	Action Products	(07) 32684722	25/01/2002	200001	IN	6		1441
HS	ACTPRO	Action Products	(07) 32684722	8/04/2002	200001	IN		150	450
HS	BIGCUS	Big Customer	(02) 9345665	22/01/2002	200001	IN	9	1622.5	1622.5
HS	BIGCUS	Big Customer	(02) 9345665	25/01/2002	200001	IN	5	3591.5	3591.5
HS	BIGCUS	Big Customer	(02) 9345665	25/01/2002	200001	IN	10		2090
HS	BIGCUS	Big Customer	(02) 9345665	25/01/2002	200001	IN	11	2546.5	2546.5
HS	TOPBUY	Top Buyer	(07) 4345123	22/01/2002	200001	IN	8	2255	2255
HS	TOPBUY	Top Buyer	(07) 4345123	25/01/2002	200001	IN	7	1045	1045
HS	TOPBUY	Top Buyer	(07) 4345123	25/01/2002	200001	IN	12	1100	1100

Select **[Refresh data when opening the file]**.



The dialog box 'External Data Range Properties' has the following settings:

- Name: i4query_excel_plugin_79592
- Query definition:
 - ☒ Save query definition
 - ☐ Save password
- Refresh control:
 - ☒ Enable background refresh
 - ☐ Refresh every 60 minutes
 - ☒ **Refresh data when opening the file!**
 - ☐ Remove external data from worksheet before closing
- Data formatting and layout:
 - ☒ Include field names
 - ☐ Preserve column sort/filter/layout
 - ☐ Include row numbers
 - ☒ Preserve cell formatting
 - ☒ Adjust column width
- If the number of rows in the data range changes upon refresh:
 - ☒ Insert cells for new data, delete unused cells
 - ☐ Insert entire rows for new data, clear unused cells
 - ☐ Overwrite existing cells with new data, clear unused cells
 - ☐ Fill down formulas in columns adjacent to data

Buttons: OK, Cancel

Press **[OK]** to continue.

Save the Excel spreadsheet with its own unique name and close the Excel spreadsheet.

If you can, change your sample data. Open the saved Excel spreadsheet. The user will be requested for the password (because the box was not ticked above). Excel will only execute i4Query on entry of the correct password.

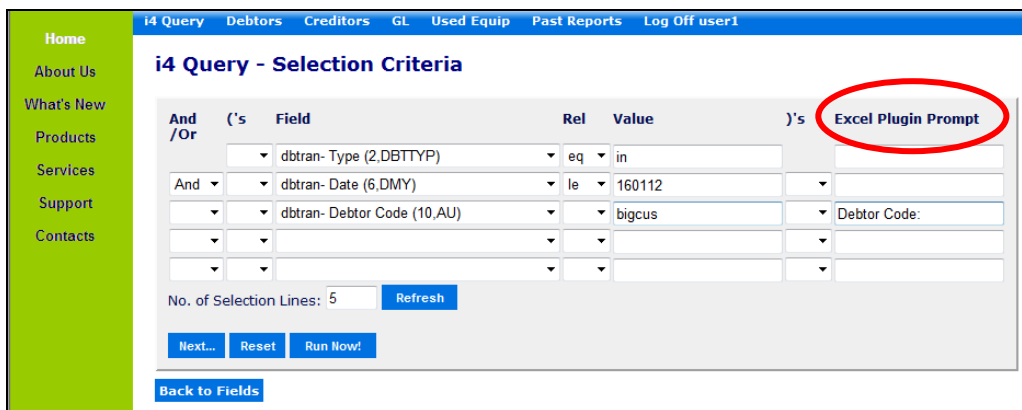
4.2. i4 plugin Parameters

There are times when you wish to pass parameters between the i4 plugin and **infoware**.

E.g. prompt for a debtor code, a stock code, a GL account and/or a period range, then only select these transactions.

This is easily handled in i4 Query by adding Excel Plugin Prompt definitions on i4 Query – Selection Criteria page.

The third line following requests data for a specific debtor code *bigcus* - the Excel Plugin prompt will be asked when you refresh data in Excel i4 Plugin and the value entered will REPLACE the value *bigcus*.



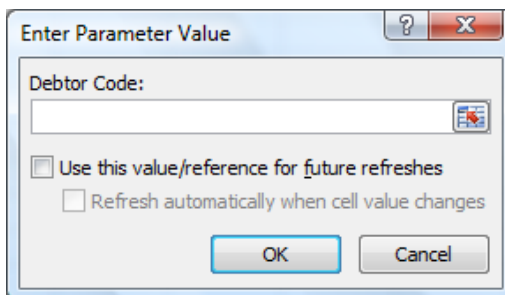
The 'i4 Query - Selection Criteria' screen shows a table with columns: And /Or, ('s, Field, Rel, Value, and 's. The third row is highlighted with a red circle around the 'Excel Plugin Prompt' label.

And /Or	('s	Field	Rel	Value	's
		dbtran- Type (2,DBTTYP)	eq	in	
And		dbtran- Date (6,DMY)	le	160112	
		dbtran- Debtor Code (10,AU)		bigcus	Debtor Code:

Buttons: Refresh, Next..., Reset, Run Now!, Back to Fields

If you change your plugin prompt, you need to re-create your plugin.

When you recreate the i4 plugin following previous steps, the following prompt is now asked:

A screenshot of a Windows-style dialog box titled "Enter Parameter Value". It has a question mark icon and a close button (X) in the top right corner. Inside the dialog, there is a label "Debtor Code:" followed by a text input field. To the right of the input field is a small icon of a document with a red arrow. Below the input field, there are two checkboxes: the first is checked and labeled "Use this value/reference for future refreshes", and the second is unchecked and labeled "Refresh automatically when cell value changes". At the bottom of the dialog are two buttons: "OK" and "Cancel".

i4 plugin Rules:

- (i) i4 Query MUST be saved before creating an i4 plugin. You cannot create a temporary i4 plugin [not save it] then create an i4 plugin.

Handy Hint

Did you know if you change an i4 Query this will automatically reflect next time you refresh your Excel plugin! (Except for Plugin Prompt changes)

If you have built pivot tables in Excel plugin worksheet, you may ADD new fields to the end of i4 Query list. You should not delete or change the order of i4 Query fields – or if you do you will have to rebuild a new i4 plugin and associated pivot tables [as the data fields values will be changed if you delete or change the column values].

Take data security seriously. We **STRONGLY** recommend there are separate i4 users with restricted data access. You can even restrict access to specific fields or specific field values. Review link:

http://satsof.com.au/infotip_8_i4Query_Field_Level_Security.pdf

Have fun! You can now have Excel spreadsheets that give you automatic up to date lists of debtors on stop credit, current employee lists, sales analysis and rankings etc. etc. This saves some users even becoming familiar with i4Query – as long as they can open a spreadsheet!

If you have any questions or suggested improvements to this document email support@satsof.com.au

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