Data Gyrations: Queries & Pivots
By: Luke Brandreth

Introduction

Multiview is based largely on the concept of your data being accessed, manipulated, and reviewed through a search system, cell grids, and pivot tables. This documentation will explain the various functions and tools to assist you in accessing this data effectively and efficiently to bring you closer to your main goal: End-Month-End.

This document will serve as a refresher for the experienced user, or a guide for a new user and will include the functions of the search criteria queries, grid manipulation, pivot table creation, and developing reports and alerts from your queries and pivots.

Search Criteria
Search Field Customization

Multiview grids are populated with data that can be drilled into via various fields. The first step of this drill down occurs in the Search Criteria window. This window appears automatically upon opening many screens but can also be accessed via the “Search” button located in the top toolbar.

In this document, the focus will be on the Voucher Inquiry screen. On this screen, the Search Criteria window will automatically open. This window is built with various fields that can assist in the first level of drilling down into the data that is desired to be displayed on the main grid of the screen. The fields that are displayed in this search can be customized by using the “Choose More Fields” button in the top right corner of the window.
This will open a secondary window titled “Customize Query Fields” which offers several functions to organize the data in a way that suits the user. “Group” allows a user to build a header to group together similar fields. An example of this is containing vendor data in a group, such as Vendor Id, Pay to Vendor, and Vendor Type Id. Clicking Add Group will bring up a pop-up to name the group and then will place a new group at the bottom of the column you chose to group on, most likely the left Displayed Fields column.
<table>
<thead>
<tr>
<th>Field</th>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Id</td>
<td>Text</td>
<td>Company identifier</td>
</tr>
<tr>
<td>Description</td>
<td>Text</td>
<td>Description of the company</td>
</tr>
<tr>
<td>Project Id</td>
<td>Text</td>
<td>Project identifier</td>
</tr>
<tr>
<td>Vendor Id</td>
<td>Text</td>
<td>Vendor identifier</td>
</tr>
<tr>
<td>Amount</td>
<td>Currency</td>
<td>Amount of money</td>
</tr>
<tr>
<td>Date</td>
<td>Date</td>
<td>Payment date</td>
</tr>
<tr>
<td>Pay To Vendor</td>
<td>Text</td>
<td>Vendor to whom payment is made</td>
</tr>
<tr>
<td>Pay To Credit</td>
<td>Text</td>
<td>Credit to whom payment is made</td>
</tr>
<tr>
<td>Pay To Contact</td>
<td>Text</td>
<td>Contact to whom payment is made</td>
</tr>
<tr>
<td>Pay To Address</td>
<td>Text</td>
<td>Address to whom payment is made</td>
</tr>
<tr>
<td>Pay To Bank</td>
<td>Text</td>
<td>Bank to whom payment is made</td>
</tr>
</tbody>
</table>

**Voucher Inquiry - Multiview Financials**

**Vendor Details**

- Pay To Vendor: [Vendor Name]
- Pay To Credit: [Credit Name]
- Pay To Contact: [Contact Name]
- Pay To Address: [Address]
- Pay To Bank: [Bank Name]
Two complimentary buttons in this screen are “Hide All” and “Show All.” The “Show All” button moves all the fields from the right Hidden Fields section to the left Displayed Fields section. The “Hide All” button completes the opposite, moving the fields from the left Displayed Fields section to the right Hidden Fields section.
The “Sort” button on the right-side panel allows you to organize the Hidden Fields by alphabetical order (A to Z) to better assist with finding your needed fields.
The “Find” button will enable a search field on either side of the screen where you can type keywords to search for a specific field you need. The characters you search for can be located anywhere in the field name and do not need to be at the start of the field name.
Relative Dates

Relative Dates is a feature that allows a code to be used instead of a specific date to define a date value in a Query. To enable Relative Dates, you need to click the checkbox in the bottom left corner.
Relative dates allow you to use a code such as From = CMB To = T in the date search fields, meaning Current Month Begin to Today.

The purpose of Relative Date Codes is to allow you to save parameterized reports/queries/alerts with date patterns so that the report can be scheduled to run daily or at some frequent schedule.

Relative Date Codes

A relative date code can be in 1 of 2 formats – a specific date or a Date Code. If the code is an 8-digit number, then it is a specific date in YYYYMMDD format. If it is not an 8-digit number, then it will interpret as a Date Code.

YYYYMMD or AAA or AAA+BBBC or AAA-BBBC
### Legend

<table>
<thead>
<tr>
<th>Meaning</th>
<th>Legend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year 1900 and up</td>
<td>YYYY</td>
</tr>
<tr>
<td>01 – 12 month</td>
<td>MM</td>
</tr>
<tr>
<td>01 – 31 day</td>
<td>DD</td>
</tr>
<tr>
<td>A date code such as CMB, CME, T, Y, etc.</td>
<td>AAA</td>
</tr>
<tr>
<td>A number to add or subtract Offset Type (Days, Weeks, Years) to the resultant date</td>
<td>BBB</td>
</tr>
<tr>
<td>A single character Offset Type such as D = Days, W = Weeks, Y = Years</td>
<td>C</td>
</tr>
</tbody>
</table>

The following table shows the Date Code (AAA) values that are currently supported:

### Legend

<table>
<thead>
<tr>
<th>Meaning</th>
<th>Legend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Today</td>
<td>T</td>
</tr>
<tr>
<td>Yesterday</td>
<td>Y</td>
</tr>
<tr>
<td>Current Month Begin</td>
<td>CMB</td>
</tr>
<tr>
<td>Current Month End</td>
<td>CME</td>
</tr>
<tr>
<td>Last Month Begin</td>
<td>LMB</td>
</tr>
<tr>
<td>Last Month End</td>
<td>LME</td>
</tr>
<tr>
<td>Current Week Begin</td>
<td>CWB</td>
</tr>
<tr>
<td>Current Week End</td>
<td>CWE</td>
</tr>
<tr>
<td>Last Week Begin</td>
<td>LWB</td>
</tr>
<tr>
<td>Last Week End</td>
<td>LWE</td>
</tr>
<tr>
<td>Current Year Begin</td>
<td>CYB</td>
</tr>
<tr>
<td>Current Year End</td>
<td>CYE</td>
</tr>
<tr>
<td>Last Year Begin</td>
<td>LYB</td>
</tr>
<tr>
<td>Last Year End</td>
<td>LYE</td>
</tr>
<tr>
<td>Last Alert Date. Used with VP Alerts to indicate the date this alert was last run. Use LAD for dates that do not have time (Accounting Date, etc.)</td>
<td>LAD</td>
</tr>
<tr>
<td>Last Alert Time. Used with VP Alerts to indicate the date/time this alert was last run. Use LAT for dates that have time (Date Created, etc.)</td>
<td>LAT</td>
</tr>
</tbody>
</table>

Important: Note that year and month are currently "Calendar Year" based.
The following table shows Offset Type (C) codes:

<table>
<thead>
<tr>
<th>Offset Type</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>D</td>
<td>Days: The resultant date will be + or – BBB number of days</td>
</tr>
<tr>
<td>B</td>
<td>Business Days: The resultant date will be + or – BBB Number of business (week) days and will skip Saturday and Sunday</td>
</tr>
<tr>
<td>W</td>
<td>Weeks: The resultant date will be + or – BBB number of weeks</td>
</tr>
<tr>
<td>M</td>
<td>Months: The resultant date will be + or – BBB number of months</td>
</tr>
<tr>
<td>Q</td>
<td>Quarters: The resultant date will be + or – BBB number of quarters</td>
</tr>
<tr>
<td>Y</td>
<td>Years: The resultant date will be + or – BBB number of years</td>
</tr>
</tbody>
</table>
Relative Date LOV

To assist in creating the above codes, any field that is a relative date code will have a Relative Date LOV (List of Values) to help you construct the code.

The following picture shows the Relative Date LOV with 6 key areas:

<table>
<thead>
<tr>
<th>LOV Area</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Specific/Relative</td>
<td>Select if you want a specific or relative date. Note that when you</td>
</tr>
<tr>
<td>Radio Button</td>
<td>select a specific date in area 2, this value automatically changes</td>
</tr>
<tr>
<td></td>
<td>to “Specific Date.” If you change anything in areas 3, 4, or 5,</td>
</tr>
<tr>
<td></td>
<td>this automatically changes to “Relative Date.”</td>
</tr>
<tr>
<td>2 Calendar</td>
<td>Select any date you want to set the code to be the YYYYMMDD specific</td>
</tr>
<tr>
<td></td>
<td>date value.</td>
</tr>
<tr>
<td>3 Relative Date Code</td>
<td>Use the drop-down to select a code such as T, Y, CMB, etc.</td>
</tr>
<tr>
<td>4 Offset</td>
<td>Use the Number Up/Down to indicate + or – number of Days, Weeks,</td>
</tr>
<tr>
<td></td>
<td>Months, etc. Use the drop-down to specify days, weeks, etc.</td>
</tr>
<tr>
<td>5 Result Display</td>
<td>This area displays the current Code derived by your settings and a</td>
</tr>
<tr>
<td></td>
<td>description of that code.</td>
</tr>
<tr>
<td>6 Buttons</td>
<td>Use OK to accept, Cancel to exit with changing, or Test to indicate</td>
</tr>
<tr>
<td></td>
<td>what the result would be based on relative to Today.</td>
</tr>
</tbody>
</table>
Defaults and Saved Queries

Multiview has the capability to create saved search parameters in the form of either Defaults or Saved Queries. These features will allow you to format your query screen with any fields you desire and save the layout to access in the future.

Additionally, the Defaults and Saved Queries will also save if you have activated the Relative Dates checkbox.

To create either of these, the first step is to customize your fields as you desire. Next, you will click the “Save Query” button. You will either choose to “Save as My Default” or “Save As.”

Saving as your default will make it so that every time you open this specific query, it will open with your saved Default layout. You can also Save as Default at the bottom of the query screen:
If you want to save a query separately from your default, you will click “Save As” and will be prompted with a screen to name the query. After you save the name, the new Saved Query will appear in the left of your Search Criteria screen under Saved Queries:
If you desire to switch back to the Default designed by Multiview for a query, simply click on Options, then use the “Restore Multiview Default” button.
A major difference between Saved Queries and Default Queries is that a Saved Query will save the contents entered in the Value columns. For example, if you often need to look at a previous month’s vouchers for a specific Bank Account, you can enter the Relative Dates codes as well as the Bank Account, save the query, and access it on the left panel at your convenience:
Other Options

Back in the Options menu, there are other features that are described in the table below:

<table>
<thead>
<tr>
<th>Options Button</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clear Fields</td>
<td>Removes all entered data in the Value columns</td>
</tr>
<tr>
<td>Restore Default Fields</td>
<td>Restores the fields to your My Default layout</td>
</tr>
<tr>
<td>Restore Multiview Default</td>
<td>Restores the fields to the standard Multiview Default layout</td>
</tr>
<tr>
<td>Copy Query to Clipboard</td>
<td>Copies data to paste into another query screen</td>
</tr>
<tr>
<td>Paste Query from Clipboard</td>
<td>Pastes the copied data into another query screen</td>
</tr>
</tbody>
</table>

The last option not listed in the table above is “Display Advanced Comparison Options.” Using this button creates a new column titled “Compare To.” A great use of this tool is comparing one field to another field. For this example the desire is to determine which vouchers have been modified on a different date than they were created.

Change the Operator to “Not Equal” and the Compare To to “Field.” Then choose “Date Modified” in the Value (From) column. Now this search will find all vouchers in the system that have a Date Modified that is different than the Date Created.
These comparisons are a deep and useful tool that can be used as creatively as you wish!

**Grid Manipulation**

**Defaults**

Like the Search Query window, in the Data Grid, there are options to create default layouts. Under the Options drop-down menu, there are several saving/restoring options available and are described in the table below:
Options Button | Use
--- | ---
Restore My Default | Restores the grid to your My Default layout
Restore Multiview Default | Restores the grid to the standard Multiview Default layout
Restore Corporate Default | Restores the grid to the saved Corporate Default layout
Restore Other… | Restores the grid to a Saved layout from your listing
Replace as My Default | Replaces My Default layout with the current layout
Save as Other… | Allows you to save a new layout other than your Default

The “Restore Corporate Default” button allows you to standardize a screen among your employees. The Corporate Default functions exactly as it sounds and creates a grid layout that will be automatically applied to all your users’ screens. Users can override it still with their own defaults, but they can always restore the corporate default as well.

To save a Corporate Default, the function first needs to be enabled in the Multiview globe button on the top left of the screen.
If you are already in your query screen (as in this example), you will need to close it and re-open it to have the function enabled.

Once the feature is enabled, you can access the “Save as Corporate Default” and “Remove Corporate Default” buttons in the Views drop-down menu.
“Save as Corporate Default” allows you to override the current default and save a new one for all your users to have access to. “Remove Corporate Default” removes the default and resets it back to the standard.

Options

Clicking the “Options” button will open a window that looks like the field management area of your Search Criteria screen. Most of these features and buttons, including “Group,” “Hide All/Show All,” etc., all function the same as previously described. However, there are extra tabs on this screen. The “Options” tab contains options to change the view and aesthetic of your grid.
Most of these features are up to you to decide how you like the look of your grid, however, there are a few items in the “Grid Display Options” area that also change how the grid works. Please see the table below to review the options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Group By Box</td>
<td>Reveals the area above the grid to drag-and-drop columns headers into allowing you to group the data. See Image 1 below for example.</td>
</tr>
<tr>
<td>Display Auto Filter Row</td>
<td>Enables the yellow filter bar to allow a user to type in and filter the specific column.</td>
</tr>
<tr>
<td>Display Summary Row</td>
<td>Enables the row on the bottom of the grid to create sums, max, min, etc. See Image 2 below for example.</td>
</tr>
<tr>
<td>Display Group Summaries</td>
<td>Acts the same as “Display Summary Row” but creates a row for each group. See Image 3 below for example.</td>
</tr>
<tr>
<td>Display Group By Field Prefix</td>
<td>When using groups, add the prefix in front of the data title. See Image 4 below for example.</td>
</tr>
</tbody>
</table>
Image 3: Display Group Summaries

Image 4: Display Group By Field Prefix: Left = Disabled; Right = Enabled
The Calculated Columns tab allows you to create custom columns that reference other columns within your grid. These can be saved in any of your defaults or saved screens as well. To create the formula that will populate your column, you can select one of the 3 lines and then click Edit Condition.

Here you can see all the various options that you can insert into your field. The different areas on the screen will be described in the table below.
Area | Description
--- | ---
1 | This is the area that the formula is built and displayed.
2 | Headers containing the various options with which to build your formula.
3 | Content changes based on which header is selected. Contains the specific string, operator, function, etc. that build the formula.
4 | Description area for the item selected in area 3.

Once a calculated column is created, it can be pulled into your grid just like any other field.

**Pivot Tables**

Pivot Tables are in the right-hand docking panel, and in the case of the Voucher Inquiry screen, it is the fifth tab in the panel.
What you’ll see is the Multiview default for the Voucher Inquiry pivot displayed, as well as a plethora of features to help you manipulate the data. Pivot Tables will operate the same in every module and screen as they do here.

Clicking on the Options button will open the Pivot Options window which is where you can customize your table.
The area on the far left contains all the fields that are available for you to pull into your table. These fields can be dragged and dropped into the main Pivot Fields area of the window.
In the Pivot Fields area, the Type column can be changed from either Sum, Count, Min, Max, or Average to change how the cell is going to calculate the displayed value.

In addition to the standard fields offered on the screen, we can also create a Calculated Field here, similarly to how it was done in the Grid. When you click the “Calculated Fields” button, you will be presented with three options.
Add Calculated Number and Add Calculated String use the same screen to build the expression as seen in the grid and allows a user to create a new expression to add a custom field into the pivot table. The difference between the two is the type of data that can be included which will be filtered for you. Edit Calculated Expression allows you to modify an already existing expression.
The “Format” button allows you to cycle through the different monetary display options, as seen in the below picture.
The “Arrange” button, is one of the most important features of pivots. Clicking it will open a new window that allows you to change the layout of the main pivot by manipulating your selected fields within the four areas: Filter, Column, Row, and Data. You can drag and drop the fields between each area, and you will be able to see how the pivot updates in the background on the main Multiview Screen.
The Filter (1) area contains extra fields that are not in the main table in which you can filter the table data. The Data (2) area is where you will add the field containing the data you wish to see, in this case, Invoice Amount. The Column (3) and Row (4) areas each control what the headers are on their respective areas.
When making these changes in the window, you will be able to see your changed updated in the Pivot table in the background. This can be prevented by clicking the Defer Layout Update checkbox in the bottom of the window, which will force you to manually update the table after you have made changes.

In addition to making the arrangement changes in the pop-up window, you can also drag and drop the field headers on the main screen to place them where you want and edit freely.
Back on the main screen of Multiview, the “Graph Wizard” button is where you can build your supporting graph using the data that you have selected in your Pivot table.

There are many different options you can choose from on the left of the window to modify how your graph will look. You can also cycle through all the categories by clicking the “Next” button at the bottom of the window.

Once you have chosen a graph and customized it to your liking, you can use the “Layout” button on the main screen to change the arrangement of your graph and your table in respect to each other.
Once your pivot is built to your specifications, it can be useful to drill down into specific data to further analyze what information is making up the displayed call values. Double-clicking on any given cell on the pivot table will modify the grid data to show the line items that are making up the cell data, as seen below.
Query and Pivot Reports

Creating reports based upon queries and pivots is a useful feature to share data and create easy access to it for yourself, and other users. To access these options, use the Reports drop-down menu located in the top toolbar. The bottom options are Create a new Query Report and Create a new Pivot Report. These will open new windows to create the respective report. The screen functions the same for each of the options.
The bare-minimum requirement you need to fill in is the Report Name, which you can name at your discretion. You can then click OK and the report will be created.
There are several other options you can change on this screen, such as sharing options (1), the report parameters (2), and how often the report will refresh (3).

Additionally, you can create an alert for the report and choose a Workflow Position to which the alert is assigned. This can be done using the Alert Settings area. You need to fill in the Alert Type as well as select the position to receive the alert.
Further Examples

Example #1

You have pre-vouchers that are not getting approved in a timely manner and want to see the number of days an item has been waiting approval.

1. To get started, navigate to Main Menu > Multiview > Workflow > Workflow Open Assignments.
2. A list of all items currently in the Workflow will appear in the grid. For this inquiry, you only want to see items in the Pre-Voucher Workflow. Click on the Search button on the top toolbar to open the Search Criteria window, where we can narrow down our search results.
3. Click on the Choose More Fields button in the top-right corner to customize the fields available for query. There are many query fields in this screen that you will not need, so you can clean it up to make it easier to find the fields you want.
   - Move all fields from the Displayed Fields column on the left-hand side to the Hidden Fields column on the right by clicking on the “Hide All” button.
Drag and drop the following fields from the Hidden Fields column back to the Displayed Fields Column on the left:

i. App
ii. Desc Text
• Click the “OK” button at the bottom of the Customize Query Fields pop-up window.

4. Entering Search parameters
   • The App is “Pre-Voucher Approval.” With just that parameter entered, it will show all pre-voucher assignments, including data entry tasks.
   • If you want to see only approvals, then you can use the Desc Text parameter to look for only nodes that contain “Approval” in their name. Select the Desc Text field and then:
     i. Change the Operator from “Equals” to “Like.”
     ii. In the Value (From) field, enter “Approval.”

5. Adding a calculated field for days outstanding
   • Click on the “Options” button above the grid.
   • Select the Calculated Columns tab along the top of the Options window.
   • Select the first calculated field, Calc 1, and click on the “Edit Condition” button above the calculated fields.

   • Choose Functions from the first column and double-click on DateDiffDay(,) from the middle column. This will put it into the top section of the Expression Editor.
Choose Columns from the first column and double-click on [Date Assigned] from the middle column.

Move your cursor in between the comma and the closing parenthesis.

Choose Functions from the first column and double-click on Today() from the middle column.

Your expression should read: `DateDiffDay([Date Assigned],Today())`.
• Click OK.
• Click into the Caption field where it says Calc 1. Type in your calculated field a desired name, ex: Days in Approval.
Click on the Columns tab at the top of the Options window and then drag and drop the calculated field from the Hidden Fields on the right-hand side to the Displayed Fields on the left-hand side. **Note:** The calculated field will still have the Caption of “Calc 1” on the Columns tab, but the name will appear correctly in the Grid.

6. Saving the query as a report
   - Click on the “Reports” button on the top toolbar and select Create a New Query Report.
• Enter a name for your Report in the Report Name field, such as “Pre-Voucher – Days in Approval Report.”
• Click Ok

7. You can access any saved query report from either the inquiry screen where it was created, or the My Reports screen. Click on the “Reports” button on the top toolbar and Select My Reports. Find the report that you created and double-click it, or click on View Results, to run your query.

Example #2

You would like to run a Trial Balance report and be able to see totals by Business Unit/department as well as be able to drill into the detail where needed.

1. To get started, navigate to Main Menu-> Multiview -> General Ledger-> Trial Balance Analysis.

2. Once directed to the Trial Balance Analysis screen, a Search Criteria window will appear.
• Select the Use Relative Dates checkbox located at the bottom of the Search Criteria window to enable the use of relative periods instead of calendar dates. This helps your search remain ‘current’ in relation to when you perform your query.
• When the Use Relative Dates option is selected, clicking on a date drop-down will raise the Relative Date popup. You can select a Relative Date Type from the drop-down.
  i. Select CYB - Current Year Begin for the From Date
  ii. Select CME - Current Month End for the To Date
• Enter a Company Id as desired.
• Click Query

3. Customizing your Pivot
• Click on the Pivot panel on the right-hand side of the screen. Adjust the panel to occupy half of your screen. This enables you to have more space to experience the full functionality of the Pivot table.
• Click on the Options button in the top right corner.
• Click on Delete > Delete All Pivot Fields

• Open the Dimensions section on the left > Drag and drop the following fields to the pivot fields on the right:
  i. Account
  ii. Account Type
• Open the Measures section-> Drag and drop the following fields to the pivot fields on the right:
i. Activity Balance  
ii. Beginning Year Balance  
iii. Closing Balance  
iv. Credit Activity Balance  
v. Debit Activity Balance  
vi. Opening Balance  
vii. Year To Date Balance  

- Click OK  

4. Creating your Pivot table  
   - Drag and drop the following fields on the Rows (Drop Row Fields here)  
     i. Account Type  
     ii. Account  
   - Drag and drop the following fields on the Data Items (Drop Data Items Here)  
     i. Beginning Year Balance  
     ii. Opening Balance  
     iii. Debit Activity Balance  
     iv. Credit Activity Balance  
     v. Closing Balance  
     vi. Year To Date Balance
5. Adjusting/Using your Pivot table
   • Switch Activity Balance with Debit and Credit Activity Balance fields
     i. Drag and drop Debit Activity Balance and Credit Activity Balance fields back up to the filter fields
     ii. Drag Activity Balance down to the data fields in between the opening and closing balance fields
     iii. Right-click in the blue space under the Asset group heading and select Collapse All

   • Filter to look at just revenue and expense account types
     i. Click on the funnel icon in the top-right corner of the Account Type field heading and uncheck Asset, Liability, and Capital
6. Saving your Pivot Table
   • Click on the Drop-down beside the options button and select Replace as My Default

   ii. Click OK
   • Right-click on the Revenue group heading and select Expand All
   • Double-click in the Clinic Service Revenue Activity Balance cell.
   • Remove the filter from the Account Type
   • Click on the funnel icon in the top-right corner of the Account Type field heading and check (Show All).
   • Click Ok.
Example #3

You would like to analyze revenue by department for the first 2 quarters of FY 2023. You would like to get results ranked from top to bottom. You have decided to use a Pivot table to dissect the data and present the results.

1. To get started, navigate to Main Menu-> Multiview -> General Ledger-> Journal Transaction Inquiry.

2. From the Search Criteria screen, select Choose More Fields (Star Icon, top-right) and add in Account Type by dragging it from Hidden Fields to the Displayed Fields
• Click Ok
• Add the following parameters to the Query window.

<table>
<thead>
<tr>
<th>Field</th>
<th>Operator</th>
<th>Value (From)</th>
<th>Value (To)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Type</td>
<td>Is</td>
<td>Revenue</td>
<td></td>
</tr>
<tr>
<td>Accounting Date</td>
<td>In Between</td>
<td>01/01/2023</td>
<td>06/30/2023</td>
</tr>
<tr>
<td>Company Id</td>
<td>Equals</td>
<td>CANU</td>
<td></td>
</tr>
</tbody>
</table>

• Click Save Query and select Save As...
• Type "Revenue by Department" in the Title bar
• Click OK.
• Click Query to continue.

3. Customizing your Pivot
• Select Views > Multiview Default to restore the screen layout to Multiview default.
• Select the Pivot panel on the right-hand side of the screen and adjust the window to occupy half of your screen. This enables you to have more space to experience the full functionality of the Pivot table.
• Click on the Options button from the docking panel (NOT from the grid), the Pivot Options window will pop-up (WARNING: You need to be on the Pivot tab otherwise the correct options window will not appear).
• Open the Dimensions section on the left > Drag and drop the following fields to the pivot fields on the right:
  i. Account
  ii. Business Unit
• When these fields have been added to your Pivot Fields display, it should appear as below:
4. Modifying Pivot Fields
   - Change Names by clicking and typing into the Name column.
     i.  "Account" to "Account Name" for the field Based on ACCOUNT_NO$D
     ii. "Business Unit" to "Business Unit Name" for the field Based on UNIT_ID$D
5. Adding a Calculated Pivot Field
   - To add calculated fields, select Calculated Fields at the top of the Pivot Options display and then select Add Calculated Number
   - A pop-up window will appear prompting you to enter a title for the field: “Revenue.”
   - Click OK to continue.
   - At the Expression Editor:
     i. Choose Fields from the first column and double-click on [Amount] from the middle column (it has now appeared as a variable on the Expression Editor panel above)
     ii. Type in the rest of the formula \( \times -1 \) in the Expression Editor, so that the formula displayed is: \([\text{Amount}] \times -1\)
6. Click OK to continue and then OK again on the Pivot Options screen.
   - At the main Pivot tab
   - Remove (Drag) Company Id, Amount and Currency Id to the FILTER Area
• Drag the measure Revenue (Magic Wand Icon) into Drop DATA Items Here
• Drag the dimensions Business Unit Name and Account Name into Drop ROW Fields Here

7. Final clean-up
   • In your Pivot Grid, remove Account Name from the ROW Fields to FILTER Area to provide a less detailed Summary View to accommodate high-level information needs.
   • To address the Company's inquiry of which department has the highest Revenue, right-click on the respective column and choose Sort "Business Unit Name" by This Column
Your finished pivot report should look as follows:
Example #4

You would like to create a Query report to alert you when an Account has been added. You do not want to miss adding a new account to your Ownership.

1. To get started, navigate to System Maintenance Menu > General Ledger Setup module > Accounts.

2. Press on the Search button on the tool bar, a Search Criteria window will appear.
   - Select the Use Relative Dates checkbox located at the bottom of the Search Criteria window to enable the use of relative periods instead of calendar dates. This helps your search remain 'current' in relation to when you perform your query.
   - Click on the drop down in the Date Created field to open the Relative Date window.
   - Under the Relative Date Type, select LAT - Last Alert Time
   - Click OK
   - Query
3. The search above returns an empty grid, as we do not have data that met the criteria in the search.

4. Create the Query report.
   - Click on the Reports button on the top toolbar and select Create a New Query Report.
   - Enter a name for your Report in the Report Name field, such as "Accounts to be added to Ownership."

5. Setting up the report to run on a schedule.
   - While on the same screen, open the Refresh Type drop down located under the Automatic Refresh Settings area. Select a Refresh Type of Once a Day.
   - Tab over to the Refresh Time of Day field and select the time you would like this report to run, for this example we will pick 8:00 am.
   - Notice that the Next Refresh field has been updated to reflect the above selections. This field can be overridden.
6. Setting up the alert
   - From the Alert Type drop down, please select Send Message.
   - Send Message will send an internal Multiview message letting you know there is a message for you to review. Messages will display as a pop up on the right-hand corner of the screen.
Tab over to the Compare Alert Type, use the drop down to choose Number of Records Found.

Leave all other fields as default.

Press OK to keep all selections.

7. Look at the created Query Report.
   - From the tool bar, select My Reports.
   - Search for the report created by using the auto filter row.

This report will run on a schedule, daily at 8:00am.

   - Open System Maintenance Menu > General Ledger Setup module > Accounts.
   - Click on the Add Account button and populate the following fields:
     i. Chart Id: 01
     ii. Account No: TEST
     iii. Account: TEST
     iv. Account Type: Asset
   - Open the My Reports screen (Reports button on the tool bar, select My Reports)
   - Find your Query report and press on the Run/Refresh button on the toolbar.
   - You will notice three changes after a successful run, or if there are new records found:
     i. The number of records found will be updated. This can be found on the right-hand panel, next to the title of the Query report.
     i.e. Accounts to be added to Ownership (1)
     ii. A small red flag will display next to title of the Query report (main grid).
iii. A Multiview Financials message will be displayed on the bottom right-hand corner of the application. You can click on this pop-up message to review your Multiview inbox.

10. Reviewing the newly created Accounts.
   - Find and select the query report on the My Reports screen.
   - Double click on the Query to drill into the Accounts screen to see the detail of the account(s) added.

11. Clearing an Alert.
   - Once you have reviewed your data, you can clear all alerts from the My Reports screen-> Clear Alert button on the tool bar.
   - In addition, you may press the Run/Refresh button to clear the counter, located to the right of the Query title (right-hand panel).