PROCUREMENT SERVICES

ePROCUREMENT: QUERIES

Purpose: To provide information to ePro campus users.

Security Access Requirement: All eProcurement users have access.

Prerequisites: None.

Find Help: For technical assistance contact 919-962-HELP or place a ticket at help.unc.edu. Please ensure "QUERY" is included in the problem description.

NOTE: If a logout screen appears when the Query section is clicked for the first time, clear your cache and browsing history, close Internet Explorer and log back into ePro.

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Query Viewer

Under Reporting Tools, select Query and then Query Viewer.

All campus queries begin with UNC, so you can type this in the Search By box and click Search

A list of queries will appear. The ones that are campus queries are:

UNC_ALL_ORDERS
UNC_ORDER_DETAILS
UNC_REQ_DEPT_SUM
UNC_REQ_DEPT_DTL
UNC_SOP_ORDERS
UNC_SOP_ORD_W_DAS

Please see Appendix A for prompts (what the query will ask for once you click Run to Excel or Schedule) and Appendix B for information returned by query.

Time Saving Tip – Favorites

If these queries will be run regularly, add these queries to favorites as follows: After running the search above, click on the Add to Favorites link next to each of the queries you wish to add to Favorites

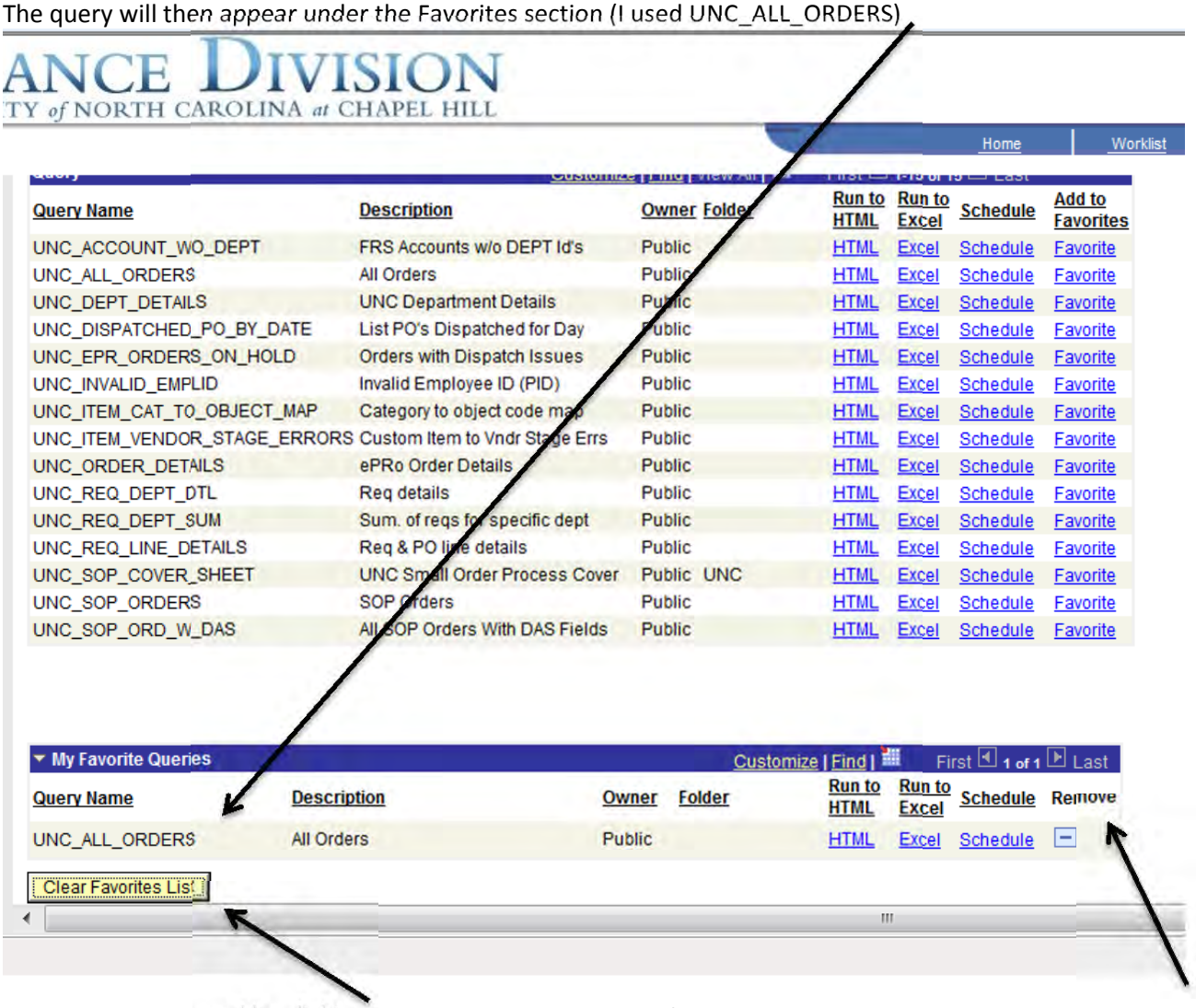
Search Results

*Folder View: -- All Folders --

Query — Customize | Find | View All | First 1-15 of 15 Last

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
UNC_ACCOUNT_WO_DEPT	FRS Accounts w/o DEPT Id's	Public		HTML	Excel	Schedule	Favorite
UNC_ALL_ORDERS	All Orders	Public		HTML	Excel	Schedule	Favorite
UNC_DEPT_DETAILS	UNC Department Details	Public		HTML	Excel	Schedule	Favorite
UNC_DISPATCHED_PO_BY_DATE	List PO's Dispatched for Day	Public		HTML	Excel	Schedule	Favorite
UNC_EPR_ORDERS_ON_HOLD	Orders with Dispatch Issues	Public		HTML	Excel	Schedule	Favorite
UNC_INVALID_EMPLID	Invalid Employee ID (PID)	Public		HTML	Excel	Schedule	Favorite
UNC_ITEM_CAT_TO_OBJECT_MAP	Category to object code map	Public		HTML	Excel	Schedule	Favorite
UNC_ITEM_VENDOR_STAGE_ERRORS	Custom Item to Vndr Stage Errs	Public		HTML	Excel	Schedule	Favorite
UNC_ORDER_DETAILS	ePRo Order Details	Public		HTML	Excel	Schedule	Favorite
UNC_REQ_DEPT_DTL	Req details	Public		HTML	Excel	Schedule	Favorite
UNC_REQ_DEPT_SUM	Sum. of reqs for specific dept	Public		HTML	Excel	Schedule	Favorite
UNC_REQ_LINE_DETAILS	Req & PO line details	Public		HTML	Excel	Schedule	Favorite
UNC_SOP_COVER_SHEET	UNC Small Order Process Cover	Public	UNC	HTML	Excel	Schedule	Favorite
UNC_SOP_ORDERS	SOP Orders	Public		HTML	Excel	Schedule	Favorite
UNC_SOP_ORD_W_DAS	All SOP Orders With DAS Fields	Public		HTML	Excel	Schedule	Favorite

The query will then appear under the Favorites section (I used UNC_ALL_ORDERS)



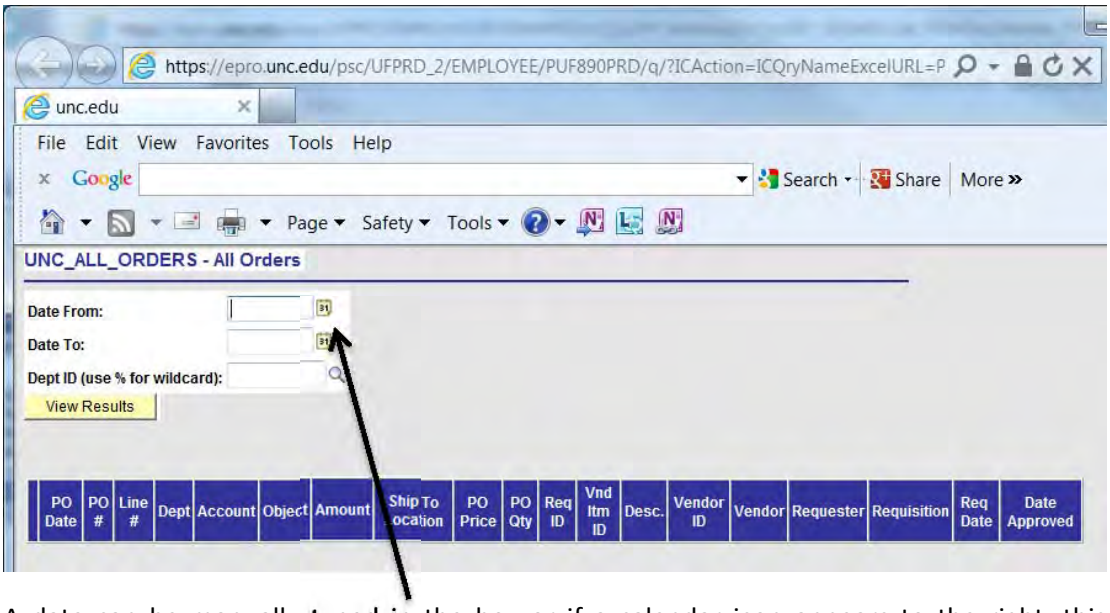
The list can be cleared by clicking this button, or a particular favorite can be removed by clicking this button.

These will only clear the queries you set as favorites. These will **not** delete the queries.

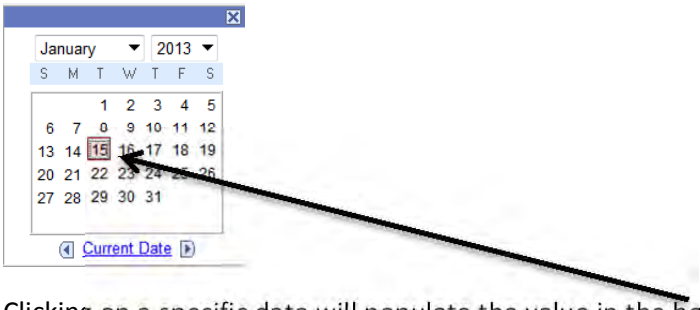
Running Query to Excel

Click the Excel hyperlink (underlined "Excel" to the right of the query you want to run).

The following window will appear:



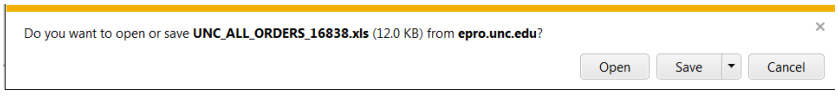
A date can be manually typed in the box or if a calendar icon appears to the right, this can be clicked on and the following appears:



Clicking on a specific date will populate the value in the box. Either the drop down boxes at the top or the arrows at the bottom may be used to navigate to the desired month and year.

The Dept ID can be up to 6 characters, or a wildcard can be utilized. For example, you need several departments' information, but they all begin with "22". You can type "22%" in the Dept. ID box and retrieve all information for any department where the ID begins with "22". **Please do not run a query with a wildcard AND a date range longer than a month**, it will take too long and cause performance issues. If you need a longer period of time or many departments, see the instructions for scheduling a query beginning on the following page.

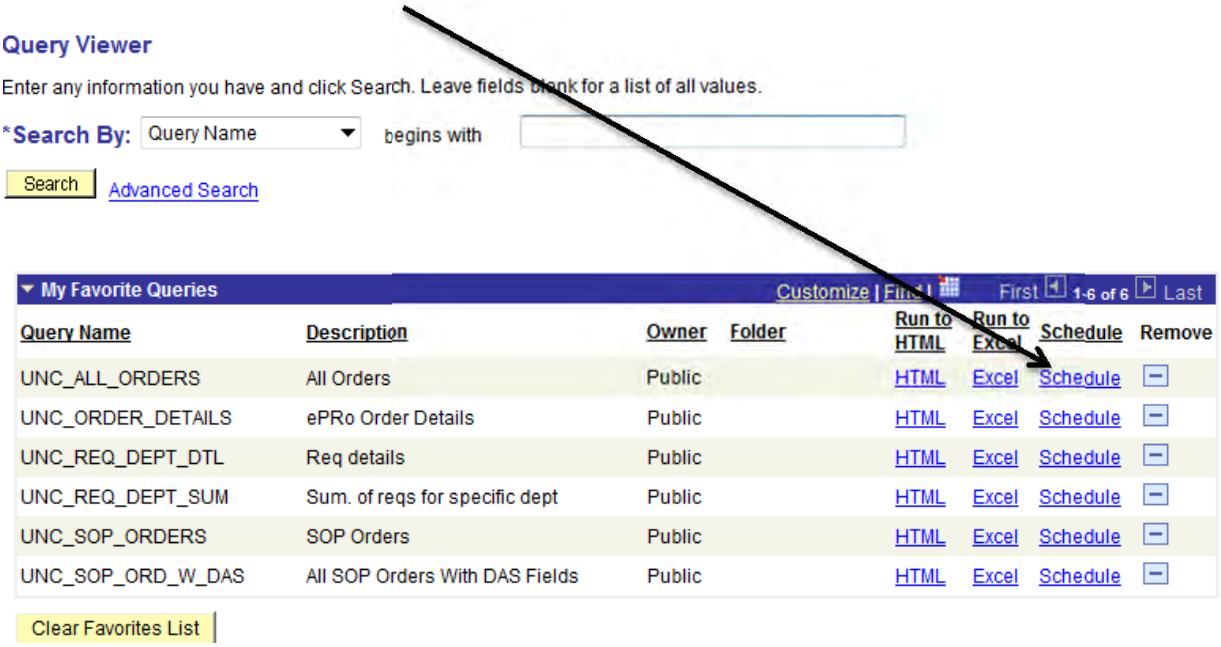
Once the three prompts are complete, click View Results. The following message may appear:



Choose to Open the file, or Save, Save As or Save and Open (choices which are available once the down arrow is selected to the right of the Save button). We recommend selecting Save As and renaming the file to something meaningful and saving in a folder created for ePro query results. **Note**: the file will be saved in Compatibility mode if you are running Excel 2010. To convert the file to 2010, once the file is opened, go to the File tab and click Convert. Click "Yes" when asked if you want to close and reopen workbook.

Scheduling Queries

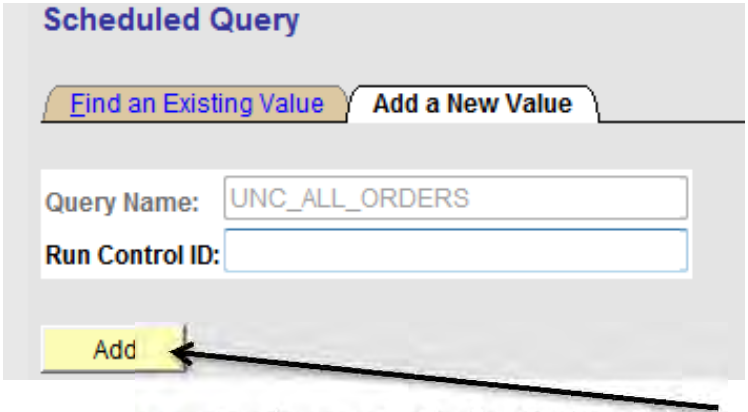
Under Reporting Tools, select Query and then Query Viewer. Click on the Schedule link to the right of the query you want to schedule.



Run Controls

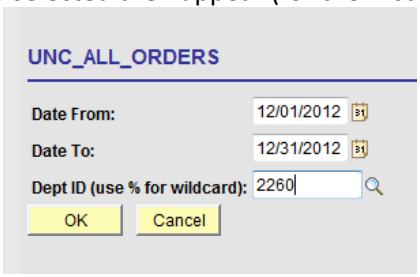
A Run Control ID needs to be established the first time a query is scheduled. Run Control ID's need to follow these rules:

- Only include alphanumeric characters
- Do not include spaces in the name – use underscores between words
- This is specific to your user name – other users will not see this run control.

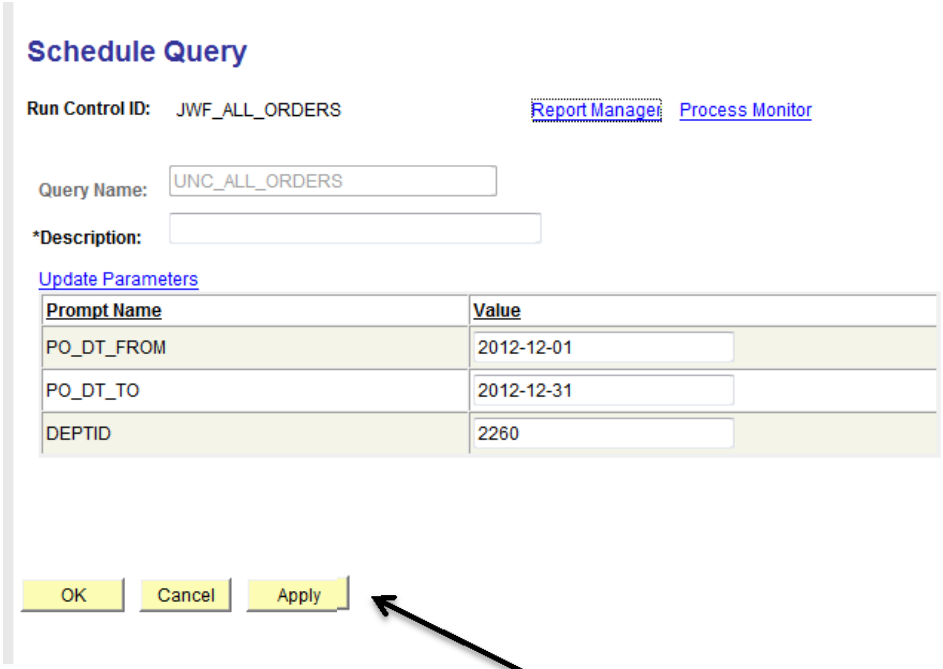


Once you have entered a name for the Run Control, click Add.

The prompts for the query selected then appear (for the first time a run control is set-up). An example has been completed here. Click OK.

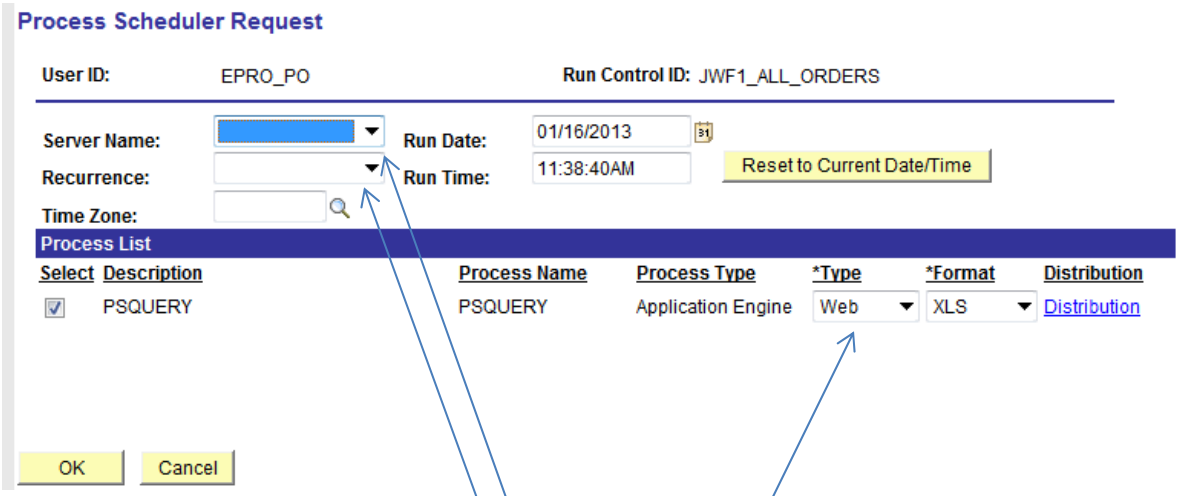


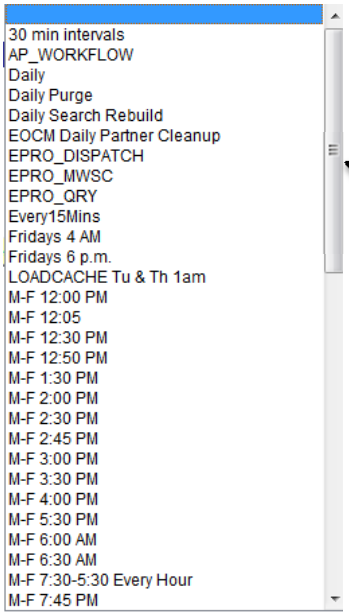
The following screen appears:



Verify all information is correct and click Apply.

Completing Process Request





The type is Web, and the recommended format is XLS.

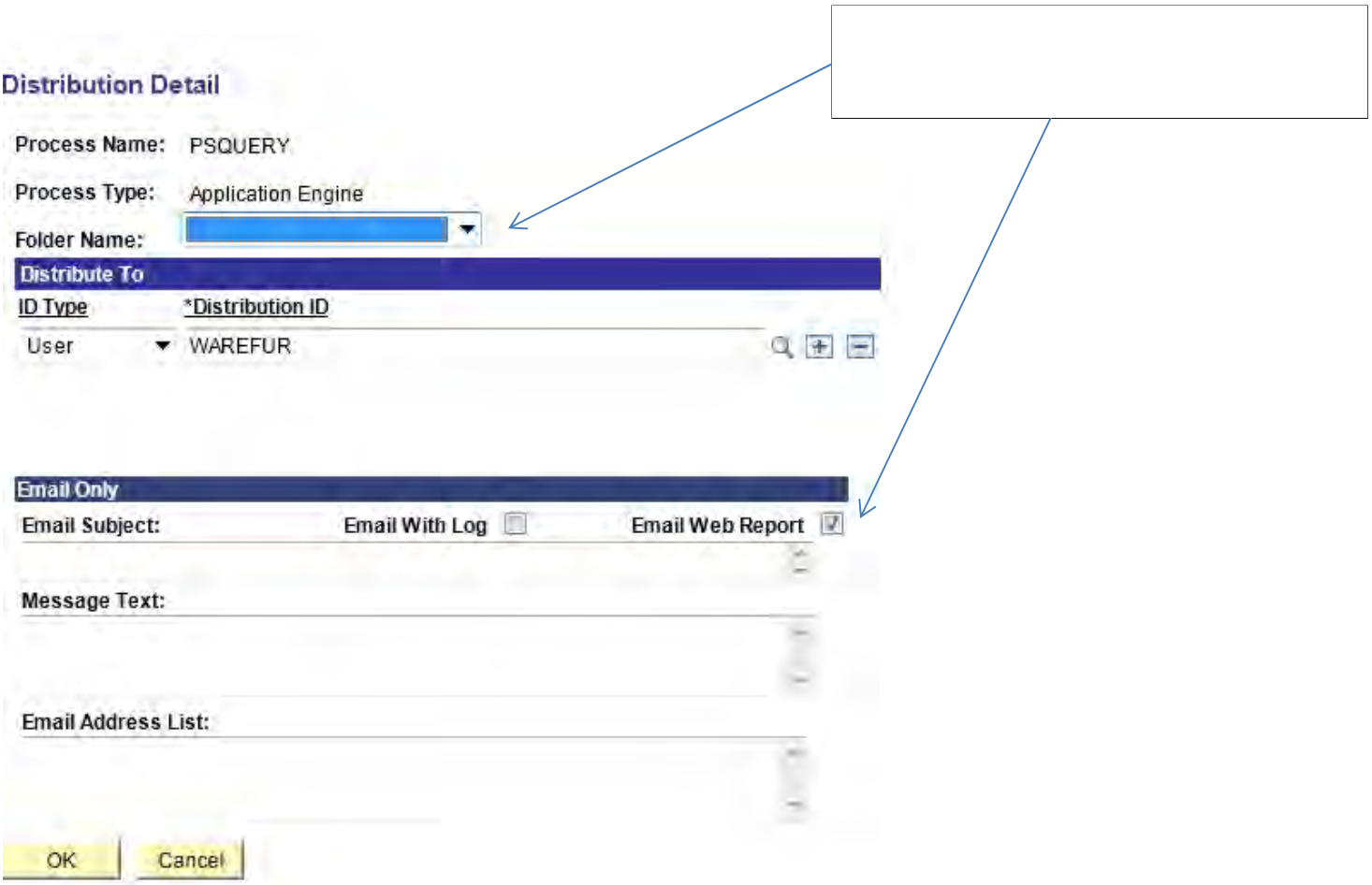
You do **not** have to pick server

The Recurrence is how often the query should be run with the chosen parameters, or it may be left blank for single queries (to be run immediately).

A partial list of available recurrence options is here, click on drop down menu and scroll to see more options.

Once Recurrance, Type, and Format are selected, click on **Distribution** link on the far right of the screen.

Distribution Detail



The email will be sent to the ONYEN listed at the time the query is scheduled or after it is submitted as follows:

From: uf890prd@unc.edu [mailto:uf890prd@unc.edu]
Sent: Wednesday, January 16, 2013 11:06 PM
To: Ware-Furlow, Joey
Subject: Output from PSQUERY (#2335379)

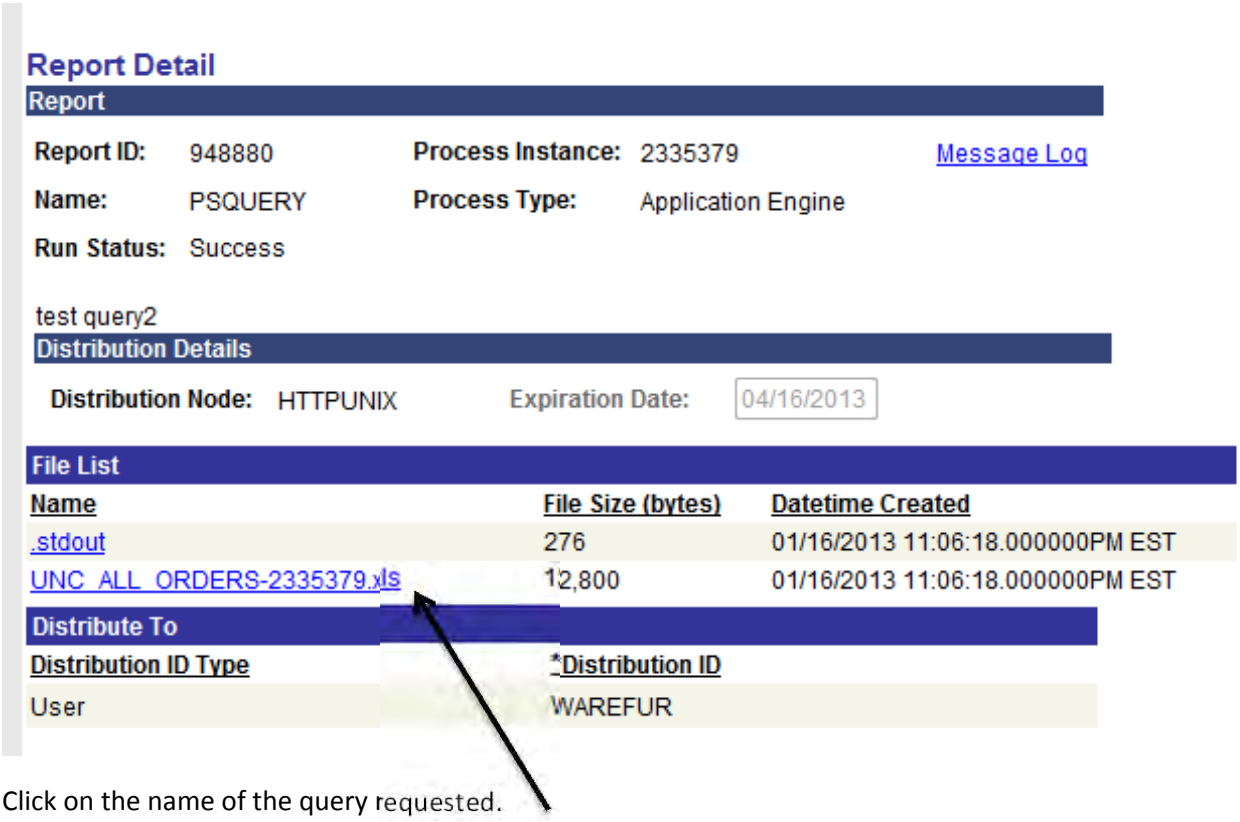
Report information for Process Instance 2335379, Process Name PSQUERY:

https://epro.unc.edu/psc/UFPRD/EMPLOYEE/PUF890PRD/c/CDM_RPT.CDM_RPT.GBL?Page=CDM_RPT_INDEX&Action=U&CDM_ID=948880

Click on the hyperlink to view the report file.

Report

This screen appears when the link is clicked from the email:



Click on the name of the query requested.

The report will open in Excel.

Appendix A: List of the queries and prompts

UNC_ALL_ORDERS	PO Date From (xx/xx/xxxx) OR use calendar button
	PO Date To (xx/xx/xxxx) OR use calendar button
	Department ID (use % for wildcard values)
UNC_ORDER_DETAILS	Requisition ID **OR**
	Department ID (use % for wildcard values)
	From Date (YYYY-MM-DD) *NOTE format change, a calendar icon is not available for this query
	To Date (YYYY-MM-DD)
UNC_REQ_DEPT_SUM	Req Date From (xx/xx/xxxx) OR use calendar button
	Req Date To (xx/xx/xxxx) OR use calendar button
	Department ID (use % for wildcard values)
UNC_REQ_DEPT_DTL	Req Date From (xx/xx/xxxx) OR use calendar button
	Req Date To (xx/xx/xxxx) OR use calendar button
	Department ID (use % for wildcard values)
UNC_SOP_ORDERS	Entered Date From (xx/xx/xxxx) OR use calendar button
	Entered Date To (xx/xx/xxxx) OR use calendar button
	Department ID (use % for wildcard values)
UNC_SOP_ORD_W_DAS	PO Date From (xx/xx/xxxx) OR use calendar button
	PO Date To (xx/xx/xxxx) OR use calendar button
	Department ID (use % for wildcard values)

Appendix B: Fields returned by query

UNC_ALL_ORDERS

Column Name	Description
PO Date	Date requisition became Purchase Order
PO #	Purchase Order Number
PO Status	Purchase Order Status
Req Status	Requisition Status
Line #	Line on Purchase Order
Dept	Department (can be up to 6 characters)
Account	6 digit account number
Object	Object Code (4 digits)
Amount	Merchandise Amount
Ship To Location	Ship To Address (usually xxx_xxxxx)
PO Price	Purchase Order price (up to 5 decimals)
PO Qty	Purchase Order Quantity
Req ID	Requisition number (10 digits)
Vnd Itm ID	Vendor Item ID
Desc.	Description
Vendor ID	Vendor Number
Vendor	Vendor Name
Requester	Name of user entering requisition
Requisition	Name the Requester gave the requisition or K# from InDEPTh
Req Date	Date requisition entered
Date Approved	Date approved

UNC_ORDER_DETAILS

Column Name	Description
Req Date	Date requisition entered
Req Status	Requisition Status
Requisition	Name the Requester gave the requisition or K# from InDEPTh
Requester	Name of user entering requisition
Dept	Department (can be up to 6 characters)
Vendor ID	Vendor Number
Vendor	Vendor Name
Line #	Line on Purchase Order
Account	6 digit account number
Object	Object Code (4 digits)
Date Approved	Date approved
Req Qty	Requisition quantity
Amount	Merchandise Amount

UNC_REQ_DEPT_SUM

Column Name	Description
Req Date	Date requisition entered
Req ID	Requisition number (10 digits)
Req Status	Requisition Status
Requisition	Name the Requester gave the requisition or K# from InDEPTh
Account	6 digit account number
Object	Object Code (4 digits)
Requester	Name of user entering requisition
Dept	Department (can be up to 6 characters)
Sum Amount	Total of requisition lines

UNC_REQ_DEPT_DTL

Column Name	Description
Req Date	Date requisition entered
Req ID	Requisition number (10 digits)
Req Status	Requisition Status
Requisition	Name the Requester gave the requisition or K# from InDEPTh
Dept	Department (can be up to 6 characters)
Account	6 digit account number
Object	Object Code (4 digits)
Line #	Line on Purchase Order
UOM	Unit of Measure
Req Qty	Requisition quantity
Amount	Merchandise Amount
Desc.	Description

UNC_SOP_ORDERS

Column Name	Description
Req ID	Requisition number (10 digits)
Req Status	Requisition Status
PO #	Purchase Order Number
PO Post Status	Purchase Order Post Status
Line #	Line on Purchase Order
Dept	Department (can be up to 6 characters)
Requisition	Name the Requester gave the requisition or K# from InDEPTh
Vendor	Vendor Name
Vendor ID	Vendor Number
Address #	Address selected where check should be sent
Requester	Name of user entering requisition
Created	Date SOP document entered
Received	Date items received (for SOP documents)
Account	6 digit account number
Object	Object Code (4 digits)
ChartField 1	Cost Code (SOP)
ChartField 2	Sub Account (SOP)
ChartField 3	Sub Subcode (SOP)
Merchandise Amt	Total of SOP lines
Discount Amt	Discount Amount (SOP)
Total Line Amt	Invoice Total (SOP)

UNC_SOP_ORD_W_DAS

Column Name	Description
PO #	Purchase Order Number
PO Status	Purchase Order Status
Line #	Line on Purchase Order
Amount	Merchandise Amount
Object	Object Code (4 digits)
Dept	Department (can be up to 6 characters)
Account	6 digit account number
Req ID	Requisition number (10 digits)
Req Status	Requisition Status
Price	SOP price
Ship To Location	Ship To Address (usually xxx_xxxxx)
PO Qty	Purchase Order Quantity
Vnd Itm ID	Vendor Item ID
Desc.	Description
PO Date	Date requisition became Purchase Order
Vendor ID	Vendor Number
Vendor	Vendor Name
Requester	Name of user entering requisition
Requisition	Name the Requester gave the requisition or K# from InDEPTh
Entered	Date SOP document entered
ChartField 1	Cost Code (SOP)
ChartField 2	Sub Account (SOP)
ChartField 3	Sub Subcode (SOP)