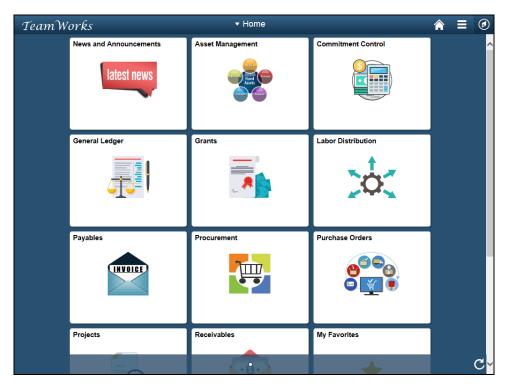


Running the Salary Travel Totals Query



| Step | Action |
|------|---|
| 1. | Navigate to the Query Viewer page. |
| | Note : This simulation is an example of a transaction. When entering a transaction in the live TeamWorks Financials system please select all values and options based on agency policy, the paperwork on hand and the current situation. |
| | Click the NavBar icon. |



| TeamW | orks | ▼ Home | | ♠ ☰ ∅ |
|-------|------------------------|-------------------|--------------------|---------------|
| | News and Announcements | Asset Management | Commitment Control | NavBar |
| | General Ledger | Grants | Labor Distribution | Recent Places |
| | Payables | Procurement | Purchase Orders | |
| | Projects | Receivables | My Favorites | |

| Step | Action |
|------|---------------------------|
| 2. | Click the Navigator icon. |
| | Navigator |



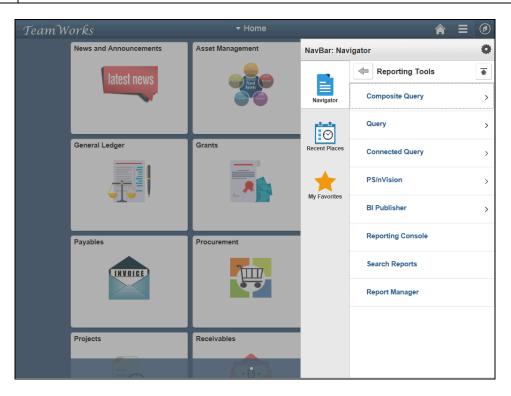
| amWorks News and Ann | | | | | |
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| News and Ann | ouncements | Asset Management | NavBar: Navi | gator | |
| late | est news | Fixed States | | SRM Custom | > |
| | | | Navigator | News and Announcements | > |
| General Ledge | | Grants | 0 | SAO Technical | > |
| General Ledge | er === 1 | Grants | Recent Places | Employee Self-Service | > |
| 4 | | | My Favorites | Supplier Contracts | > |
| | | | | Agency Security | > |
| Payables | | Procurement | | Customers | > |
| | IVOICE | | | Products | > |
| | | | | Customer Contracts | > |
| Projects | | Receivables | - | Order Management | > |
| | | | | Pricing Configuration | > |

| Step | Action |
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| 3. | Click the Vertical scrollbar. |

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| News and Announcements | Asset Management | NavBar: Navig | jator | 0 |
| latest news | Tiese Company | | Background Processes | > |
| | | Navigator | Worklist | > |
| General Ledger | Grants | Recent Places | Tree Manager | > |
| | | | Reporting Tools | > |
| | Aren 🗮 📑 | My Favorites | PeopleTools | > |
| | | | Fund Source Distribution | > |
| Payables | Procurement | | Labor Distribution | > |
| INVOICE | e | | Tax Center | |
| | | | Change My Password | |
| Projects | Receivables | | My Preferences | |
| | | | My System Profile | |



| Step | Action |
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| 4. | Click the Reporting Tools link. |
| | Reporting Tools |



| Step | Action |
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| 5. | Click the Query link. |
| | Query |



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| | News and Announcements | Asset Management | NavBar: Nav | igator | | • |
| | latest news | | | Query | | |
| | | Fixed | Navigator | Query Manager | | |
| | | | \odot | Query Viewer | | |
| | General Ledger | Grants | Recent Places | Schedule Query | | |
| | | A | My Favorites | | | |
| | Payables | Procurement | | | | |
| | Projects | Receivables | | | | |
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| 6. | Click the Query Viewer link. |
| | Query Viewer |

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| | New Window Help Personalize Page 🗐 - |
| Query Viewer | |
| Enter any information you have and click Search. Leave fields blank for a list of all values. | |
| *Search By Query Name begins with | |
| Search Advanced Search | |
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| Step | Action |
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| 7. | Query Viewer is a search page that provides users with the ability to search for public queries using various search criteria. Once the query is found users can: |
| | Search for an existing query Preview a query in an active browser window Run a query and display results in a new browser window Print a query Schedule a query to run at another date and time |

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| ter any information you have and click Search. Leave fields blank for a list of all values. | |
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| Step | Action |
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| 8. | Click the Search By list. |
| | *Search By Query Name V |



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| | New Window Help Personalize Page |
| ry Viewer Access Group Name | |
| any information you have Folder Name Fields blank for a list of all values. | |
| *Search By Owner Ouery Name begins with | |
| Search Uses Field Name Uses Record Name | |
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| 9. | The system displays eight ways a user can search for a query. |
| | Access Group Name - Search for a query or queries in a particular access group Description - Search for a query or queries based on description Folder Name - Search for a query or queries saved to a particular folder Query Name - Search for the user defined query name or description Type - Search for a particular type of query to run Uses Field Name - Search for a query or queries that contain a specific field Uses Record Name - Search for a query or queries that uses a specific record such as Job Data, Personal Data or Position Data Click the Query Name list item. Access Group Name Description Folder Name Ouery Name |
| | Uses Field Name Uses Record Name |



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| | New Window Help Personalize Page 📰 - |
| Query Viewer | |
| Enter any information you have and click Search. Leave fields blank for a list of all values. | |
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| 10. | The Advanced Search option provides users with the ability to search for a query using multiple search criteria in combination. |
| | For this example the user searches for a query using Basic Search functionality. |



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| nter any informa | ation you ha | we and click Search. Leav | e fields blank for a list | of all values. | | |
| *Se | earch By | Query Name 🗸 | begins with | | | |
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| 11. | In this example, the user is searching for a specific Salary and Travel report. Click in the Search By field. |
| | *Search By Query Name V begins with |



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| | New Window Help Personalize Page 📰 - |
| Query Viewer | |
| Enter any information you have and click Search. Leave fields blank for a list of all values. | |
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| 12. | All Salary and Travel reports begin with '0AP033'. |
| | Enter the appropriate information into the Search By field. |
| | For this example, type 0AP033 . |



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| | New Window Help Personalize Page 📰 - |
| Query Viewer | |
| Enter any information you have and click Search. Leave fields blank for a list of all values. | |
| *Search By Query Name V begins with 0AP033 | |
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| 13. | Click the Search button. | | |
| | Search | | |

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| *Folder View All Folders |
| Personalize Find View All [2]] First (2) 1.4 of 4 (2) Last arery Name Description Owner Folder Run to HTML Run to Excel Run to SML Schedule Definitional References Add to Favorites PP033A_SALARY_TRAVEL_TOT 0AP033B_SALARY_TRAVEL_TOT Public HTML Excel XML Schedule Lookup References Favorites PP033B_SALARY_TRAVEL_TOT 0AP033B_SALARY_TRAVEL_ATCH_AGY Public HTML Excel XML Schedule Lookup References Favorite PP033B_SALARY_TRAVEL_ATCH_AGY 0AP033B_SALARY_TRAVEL_ATCH_AGY Public HTML Excel XML Schedule Lookup References Favorite PP033B_SALARY_TRAVEL_ATCH_AGY 0AP033S_SALARY_TRAVEL_ATCH_AGY Public HTML Excel XML Schedule Lookup References Favorite |
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| Lookup |
| AP033D_SALARY_TRAVEL_ATCH_TOT_0AP033D_SALARY_TRAVEL_ATCH_TOT_Public HTML_Excel_XML_Schedule References Favorite |
| |



| Step | Action |
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| 14. | The system returns the result that matches the search criteria. The system lists some query reference information: |
| | Query Name - This is often the name the system uses for the query. Most users would be unfamiliar with the system Query Name. It is not used often as search criteria Description - Is usually what the user would enter as search criteria. Owner - Informs the user who created the query for private use or if it was by the business analyst team for public use. If a query returns errors or has difficulty running users can use the information displayed here for assistance. Folder - Indicates if the query is stored in a specific location within the system. This information is helpful id the user wants to search for the query at a later date. |

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| Query Viewer | | | | | | | New Window | Help Personalize Pa | ige 📰 |
| Enter any information you have and click Search. Leave fields blank for a list of all values. Search By Ouery Name Begins with OAP033 Search Advanced Search Search Results | | | | | | | | | |
| *Folder View - All Folders - V Query | | | | | | 2 | | of 4 🕑 Last | |
| Query Name Description | Owner | Folder | Run to HTML | | | Schedule | Definitional References | Add to Favorites | |
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| 0AP033B_SALARY_TRAVEL_TOT 0AP033B_SALARY_TRAVEL_TOT | Public | | HTML | Excel | XML | Schedule | Lookup References | Favorite | |
| DAP033C_SALARY_TRAVEL_ATCH_AGY DAP033C_SALARY_TRAVEL_ATCH_AGY | Public | | HTML | Excel | XML | Schedule | Lookup References | Favorite | |
| 0AP033D_SALARY_TRAVEL_ATCH_TOT 0AP033D_SALARY_TRAVEL_ATCH_TOT | Public | | HTML | Excel | XML | Schedule | Lookup References | Favorite | |
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| Step | Action |
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| 15. | The system also provides the user with three ways to receive the query results. |
| | Users can run the query to: |
| | HTML - This displays the report online. The user can Review the results and ensure it is the correct report before moving forward. Excel - The system runs the report and then opens a Microsoft Excel spreadsheet and displays the data in a spreadsheet format. This output is helpful if the user wishes to manipulate the data before distribution. XML - The system runs the report in an online format similar to HTML Schedule - The user can set the query to run at a later date and time as necessary. Using the scheduler is similar to using the Process Scheduler for running a standard report |

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| arch Results *Folder View - All Folders | | | | | | | | | |
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| ery Name | Description | Owner | Folder | Run to HTML | Run to Excel | Run to XML | Schedule | Definitional References | Add to Favorites |
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| P033B_SALARY_TRAVEL_TOT | 0AP033B_SALARY_TRAVEL_TOT | Public | | HTML | Excel | XML | Schedule | Lookup References | Favorite |
| P033C_SALARY_TRAVEL_ATCH_A | GY 0AP033C_SALARY_TRAVEL_ATCH_AGY | Public | | HTML | Excel | XML | Schedule | Lookup References | Favorite |
| P033D_SALARY_TRAVEL_ATCH_T | DT 0AP033D_SALARY_TRAVEL_ATCH_TOT | Public | | HTML | Excel | XML | Schedule | Lookup References | Favorite |
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| 16. | The Salary Travel Totals query functions as a control total query that provides summary totals for the detail information from the Salary Travel report. Use the Salary Travel Totals query obtain the summary total for the primary business unit. |



| "Folder View All Folders | *Search By Query Name vegins with 04P033 Search Advanced Search earch Results *Folder View All Folders - V Query Personalize Find View All 20 10 First 1 14 of 4 Last Advanced Search Advanced Search Advanced Search Advanced Search Personalize Find View All 20 10 First 1 14 of 4 Last Advanced Search A | *Search By Query Name vegins with 04P033 Search Advanced Search earch Results *Folder View All Folders - V Query Personalize Find View All 20 10 First 1 14 of 4 Last Advanced Search Advanced Search Advanced Search Advanced Search Personalize Find View All 20 10 First 1 14 of 4 Last Advanced Search A | iery Viewer | | | | | | | | | |
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| 17. | Click the Excel link. |
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| 18. | Use the report parameters page to enter system parameters for running the report. |
| | Most reports will request the user enter their specific organizational information such as Business Unit and or a date or year. |
| | Note : Security profiles prevent users from running reports for information about business units to which they are not assigned. |

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| 19. | Click in the Year field. |
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| 20. | Enter the appropriate information into the Year field. |
| | For this example, type 2017 . |

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| 21. | Click in the Unit field. |
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| 22. | Enter the appropriate information into the Unit field. |
| | For this example, type 46700. |



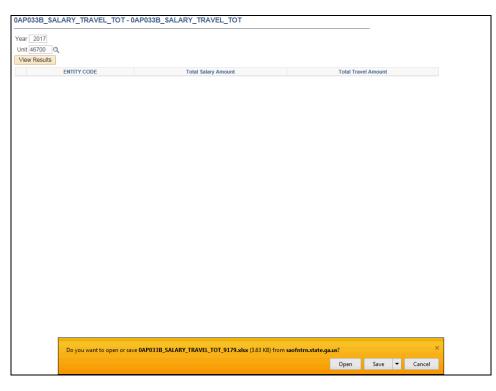
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| 23. | Click the View Results button. |
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| Step | Action |
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| 24. | The File Download dialog box displays. This dialog box functions like any other file download dialog box a windows user might encounter. It is much like saving an email attachment. |
| | Users can open the file immediately, save the file to their computer, or cancel the transaction. |



| Step | Action |
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| 25. | In this example, the user opens the document immediately. |
| | Click the Open button. |
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| 26. | The systems opens Microsoft Excel and displays the report data in a standard spreadsheet. |

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| 27. | Users can save the file like any other Microsoft Excel file by using the standard Microsoft Excel save functionality. |
| | Note : The control totals in this report are not uploaded into DOAA TIGA they are entered directly into the TIGA website. |

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| 28. | Click here (<u>https://www.surveymonkey.com/r/25KG2HH</u>) to take a quick survey. |



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| 29. | Congratulations! You have completed running the Salary Travel Totals report. |
| | End of Procedure. |