ARIZONA
PROCUREMENT PORTAL
QUICK REFERENCE GUIDE

Creating a Report

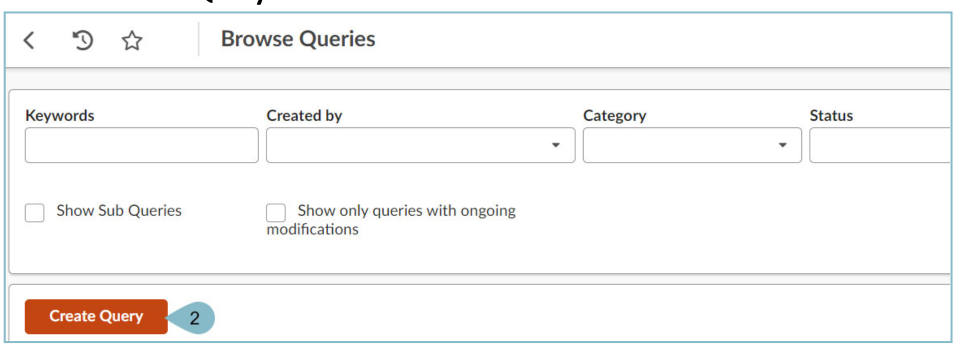
This document is a quick reference guide for users wishing to create their own report in the Arizona Procurement Portal (APP). If you have any questions, please contact the APP Help Desk at app@azdoa.gov. Additional resources are also available on the SPO website: https://spo.az.gov/.

This document is an overview of our APP Query Wizard in the Analytics tab. APP allows users to create their own reports without needing any knowledge of SQL.

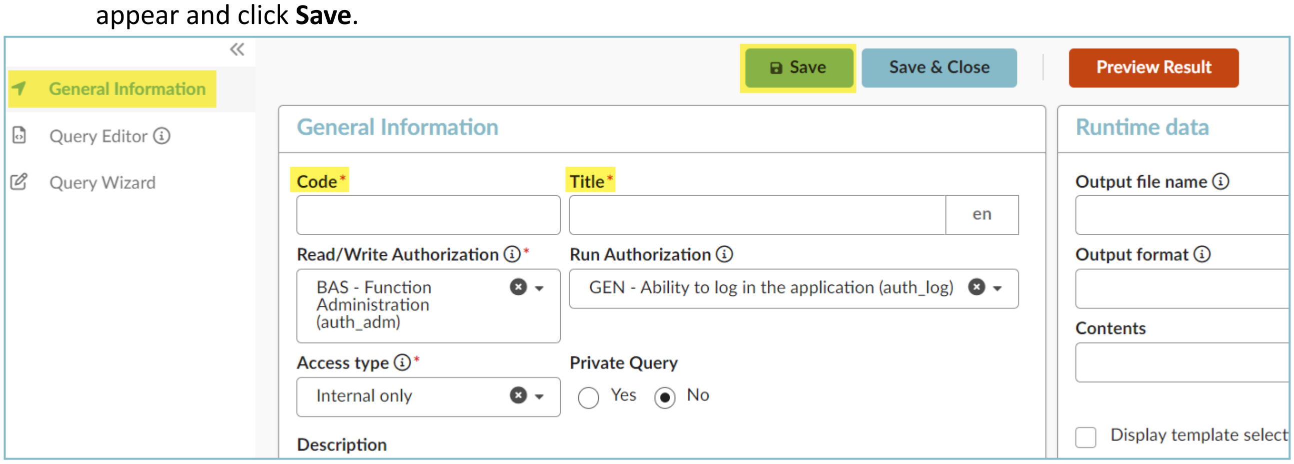
****Only users with the **Administrator / Analyst (View) Roles** can create a query within APP. This QRG is geared towards those who are an agencies reporting specialist.*

Creating a New Report

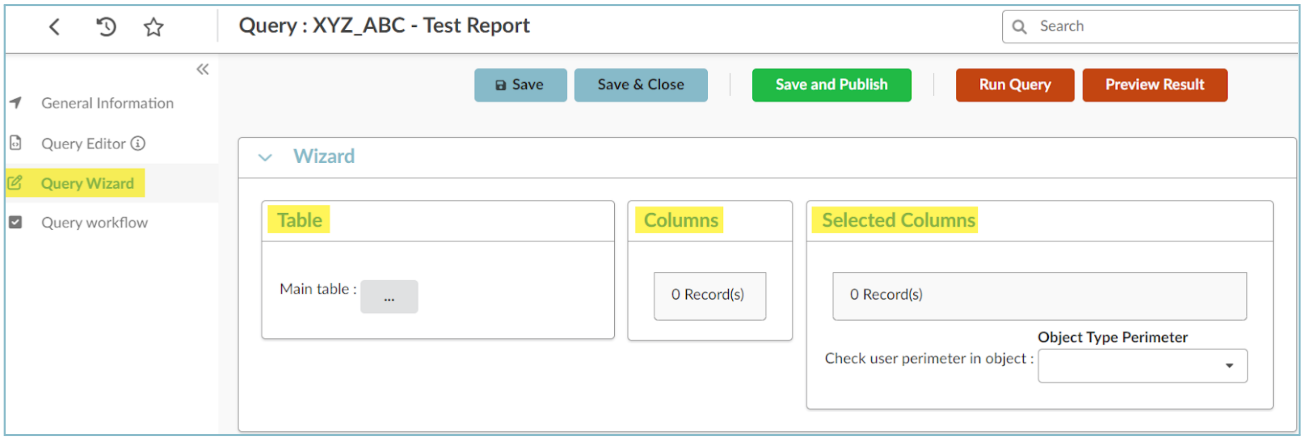
1. To create a new query, navigate to the **Analytics** dropdown and select **Browse Queries**.
2. Click the **Create Query** button.



3. **Query Creation - General Information Tab**
    a. Before you start creating your report, you will want to save and create the general information of the report.
    b. Navigate to the **General Information tab**, enter the information in the report how you want it to appear and click **Save**.

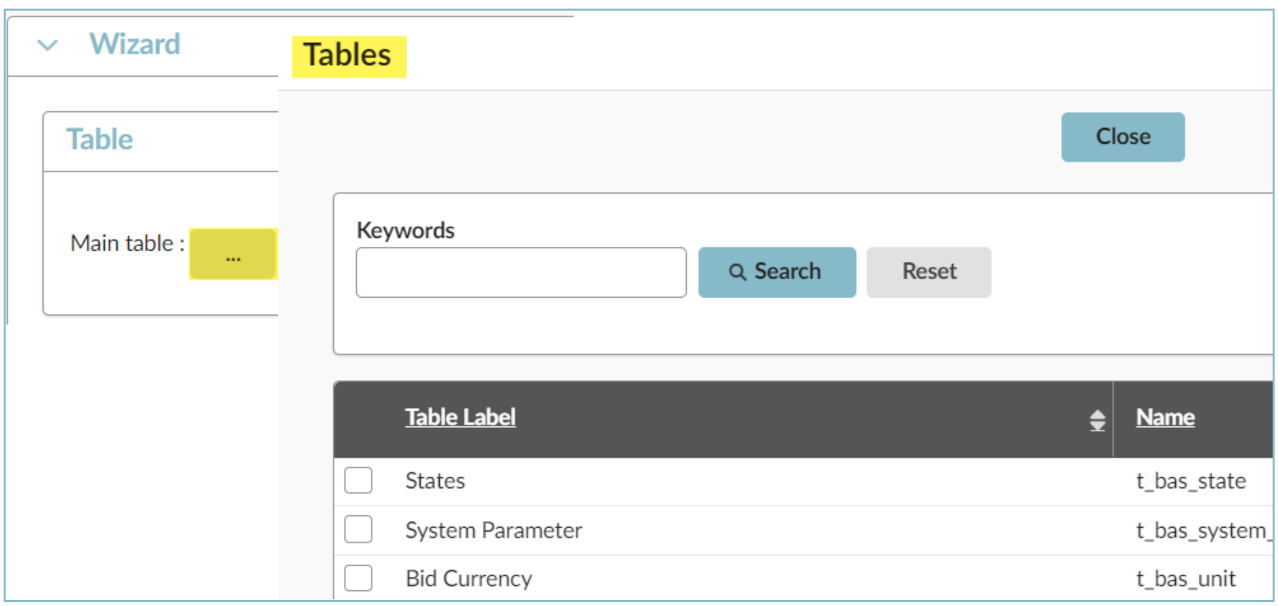


4. **Query Wizard Tab**
    a. Navigate to the **Query Wizard** tab. The query wizard tab is where you will begin to create your query. This Wizard is made up of 3 parts in order to create your report. **(Table, Columns, and Selected Columns)**

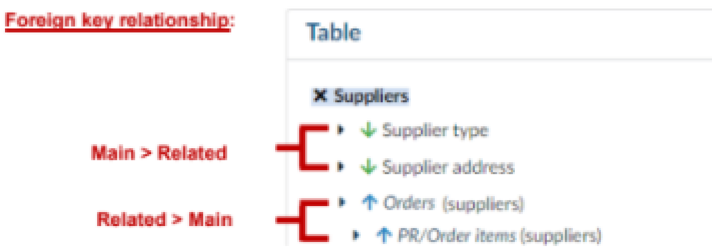


Understanding the Query Wizard

5. The <u>**Table Area**</u>, allows the selection of the main table. This where you will select the table you need to execute the query. For example: *(Purchase Requisitions)*. Click the three doted icon to select a table.



6. Once the selection has been made, this area shows the selected table, and the tree diagram of the tables linked to the Main Table (identified by a **green arrow**) and Related Tables linked (identified by a **blue arrow**).

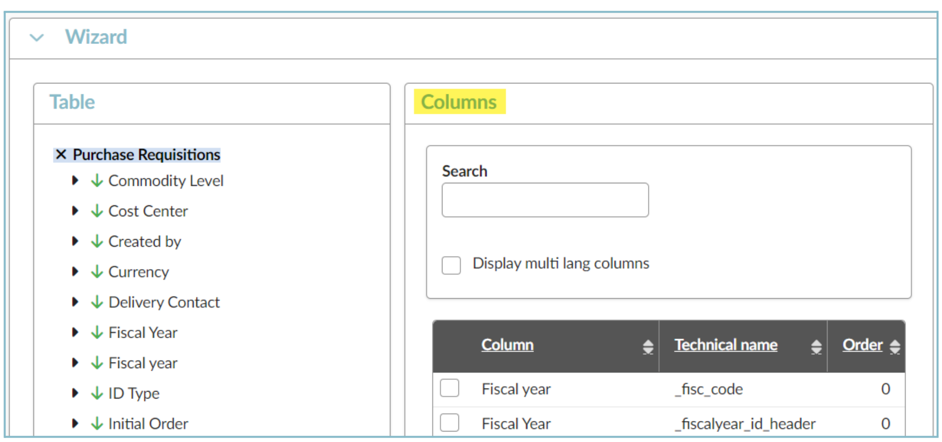


Related tables are tables that are linked to the **Main table** by a foreign key relationship.

▪ If the **foreign key is in the main table and points to the related table**, the related table is associated with the icon **(Green Arrow)**

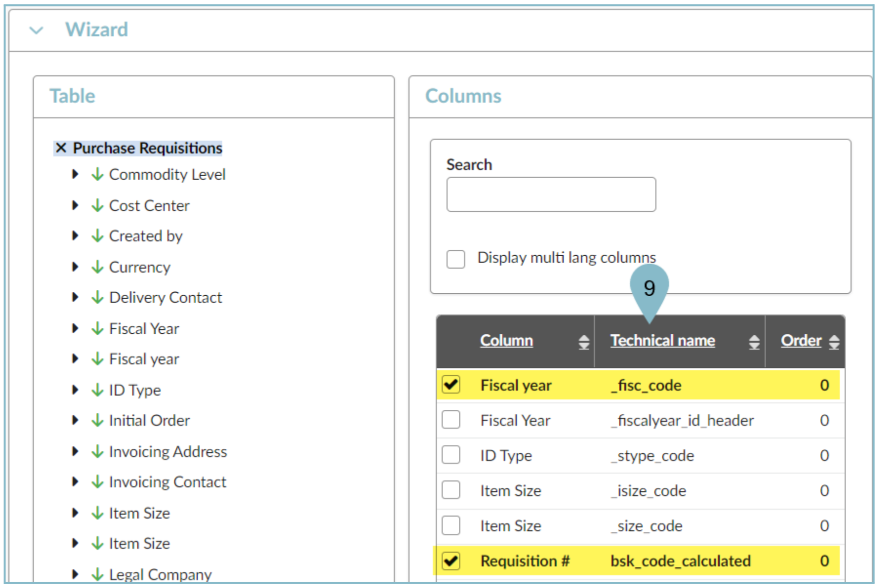
▪ If the **foreign key is in the related table and points to the main table**, the related table is associated with the icon **(Blue Arrow)**

7. In the tree chart for the Table and its related tables, select the table that contains the data that interests you. Once selected, the list of the columns for the selected table is displayed in the **Columns** area.



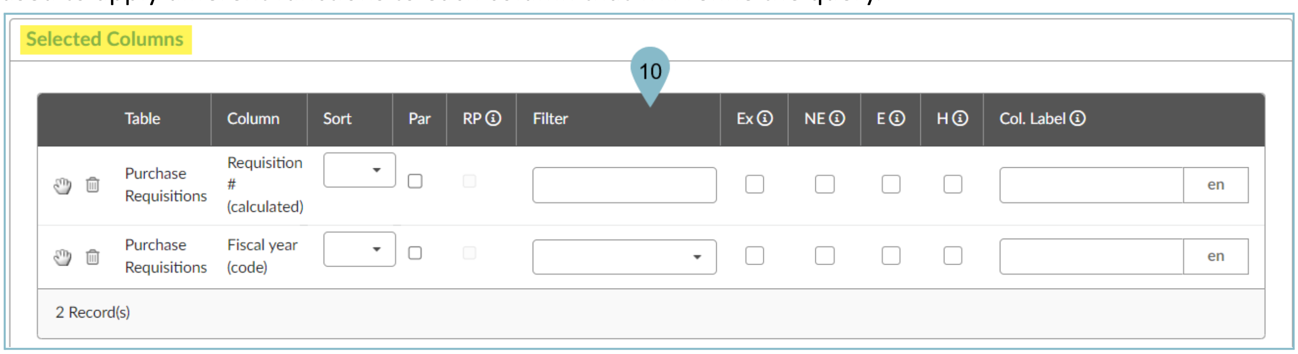
8. The **Columns area** display the columns (or fields) of the selected table. The **Checkboxes** allow you to select the columns that will be used in the query. The **Search Field** allows you to quickly locate the desired columns.

9. Now, Select the Column you would like to see in your report by clicking in the appropriate checkbox.



10. When you select a Column, it is added to the Selected Columns area.

11. The **Selected Columns area** shows the list of columns selected from the **Columns area**. This area can be used to apply different functions to each column that will refine the query.



12. You can define the query by Parameter, filters or by modify the query output display by sorting the tables or changing the name of the columns.

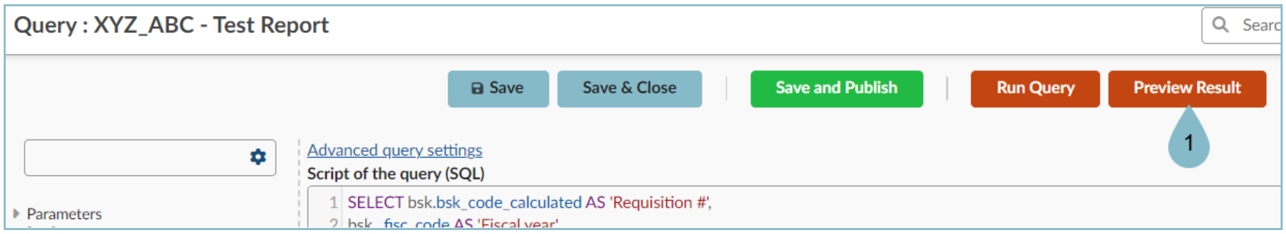
Understanding the Column Area

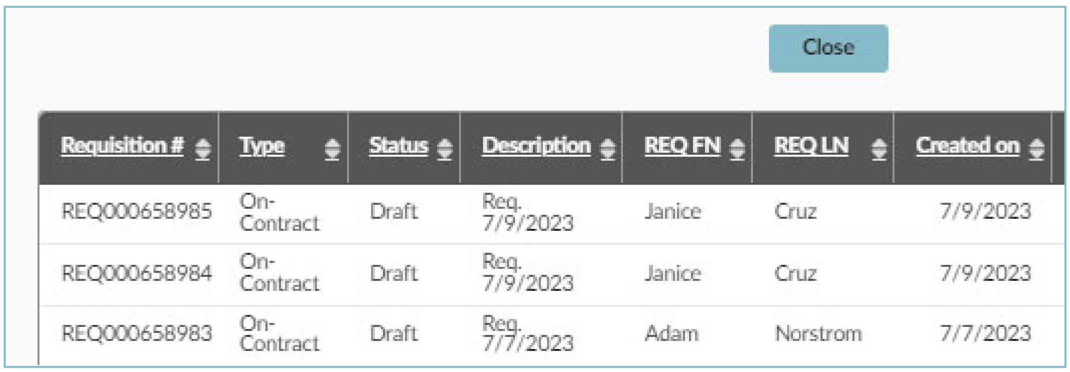
1. **Sort:** You can use these downs to sort your columns or have the data populate in descending (DESC) or ascending (ASC) order.
2. **Par:** Allows you to display one or more filters whenever a user runs the query, such as selecting a specific supplier. You can make this parameter mandatory by selecting the **RP** checkbox.
3. **Filter:** The Filter area allows you to enter a specific value for a given column and filter the results to this value.For example, a filter for a "del" value of a Status column will list all the Deleted (del) items in the report.
4. **The Exclusion (Ex)**: Inverts the effect of the Filter field, excluding the results of the input value.

5. **The Empty (E) and Non empty (NE)** Checkboxes generate respectively **"Null" and "Not null" filters.**
6. **Hide when extract (H):** Allows you to hide the columns used to filter data in the final query extract (and in query output previews).
7. **Col Label:** This allows you to name the report column yourself.

Previewing the Query Results

1. Navigate to the **Query Editor** on the left to review the query script. You can preview the query by clicking the **Preview Result** button.

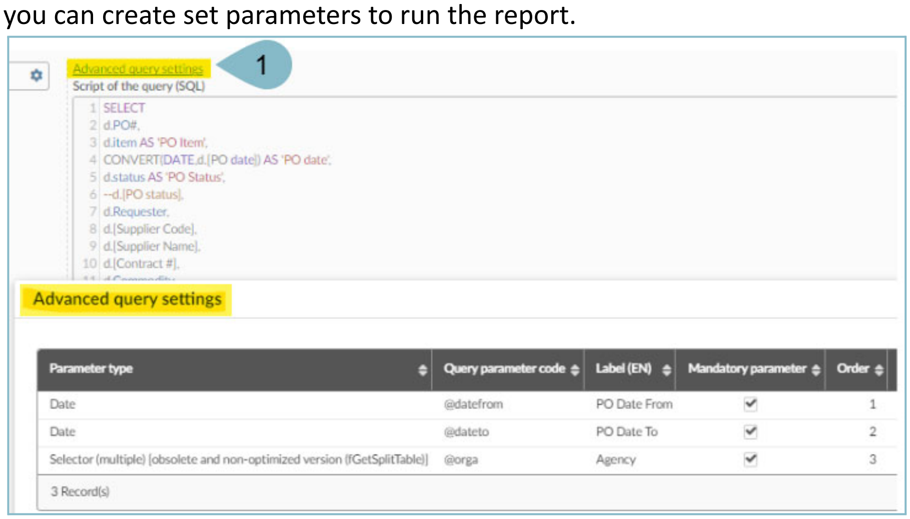




Requisition #	Type	Status	Description	REQ FN	REQ LN	Created on
REQ000658985	On-Contract	Draft	Req. 7/9/2023	Janice	Cruz	7/9/2023
REQ000658984	On-Contract	Draft	Req. 7/9/2023	Janice	Cruz	7/9/2023
REQ000658983	On-Contract	Draft	Req. 7/7/2023	Adam	Norstrom	7/7/2023

Advanced Query Settings

1. Above the script of the query. Navigate to the **Advanced Query Settings** and click **Create**. This is where you can create set parameters to run the report.



Parameter type	Query parameter code	Label (EN)	Mandatory parameter	Order
Date	@datefrom	PO Date From	✔	1
Date	@dateto	PO Date To	✔	2
Selector (multiple) (obsolete and non-optimized version (fGetSplitTable))	@orga	Agency	✔	3

3 Record(s)

1a. Set Query Parameter Code: Typical codes used are: @datefrom, @dateto, @dept (will display Organization Tree),

1b. Parameter Type: Set your parameter type. It is important to choose the right parameter type

1c. Label: Create a unique label for your parameter

1d. Mandatory Parameter: Click the box if you want to make the parameter mandatory to pull the report.

1e. Order: You can list the order of your parameters, but it is not required.

To construct your parameters, ensure that the **PAR** checkbox in your **selected columns** in the **Query Wizard** is checked; otherwise, no parameters will be available to change in the advanced query settings.

2. Click **Save** and Test your report.

Resources

Click the link below for more information on reporting in APP:
https://spointra.az.gov/arizona-procurement-portal/app-support/quick-reference-guides-176-upgrade/quick-reference-guides-176#overlay-context=file/1355