

An introduction to

INQUIRY

A 3D red line graph is shown on a white grid background. The graph starts with a jagged, fluctuating line on the left and then transitions into a single, large, upward-pointing arrow on the right, symbolizing growth and progress.

for

Microsoft Dynamics SL

What is *INQUIRY*?

INQUIRY for Dynamics SL is an **ad-hoc query** product integrated into your Dynamics SL solution and designed for users at all levels of your organization.



What can *INQUIRY* do?

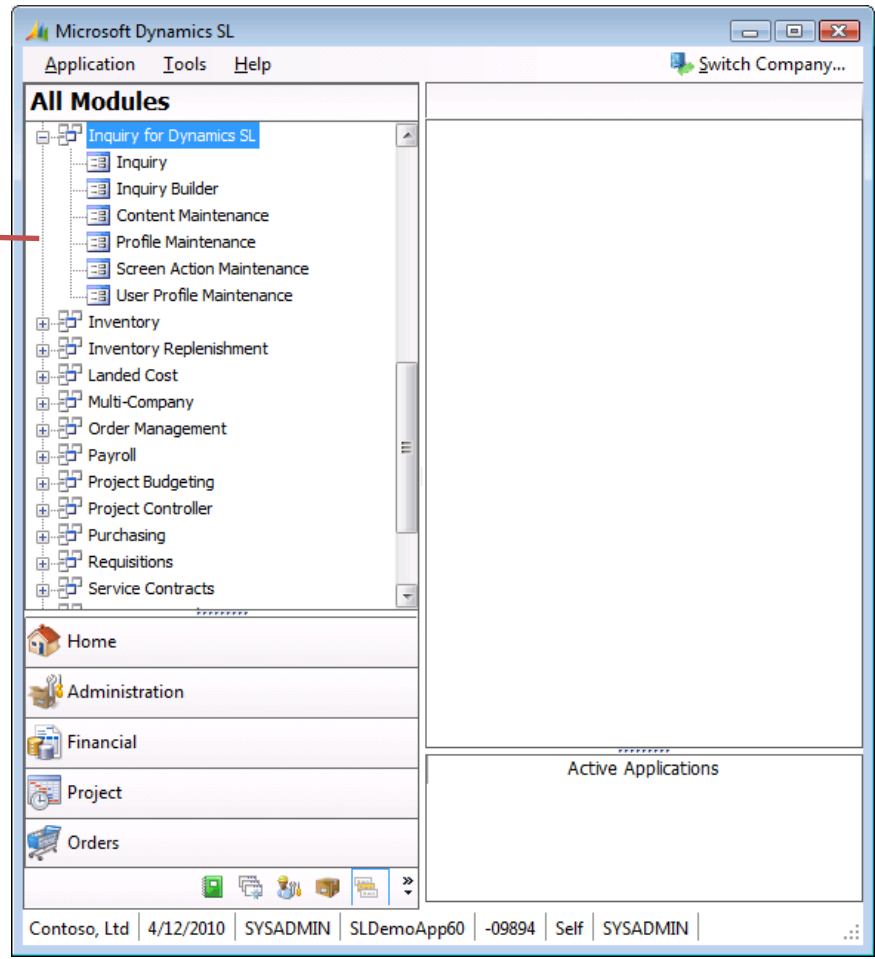
- **LIST** data in logically grouped queries
- **CUSTOMIZE** the display by changing the query columns
- **SEARCH** any of the columns of the query
- **EXPORT** queries to Microsoft Excel
- **GROUP** and **SUMMARIZE** data with simple drag and drop
- **NAVIGATE** from a row of data to a Dynamics SL screen
- **PERSONALIZE** queries by saving your favorites
- **CREATE** new queries using any data in your organization



Integrated into Dynamics SL

INQUIRY is launched from within the Dynamics SL Menu

Each ***INQUIRY*** screen is accessible in the SL Menu



Predefined Queries

INQUIRY includes queries that can be used, copied and modified as needed

Prebuilt queries include GL, AP, AR, Inventory, Order Management, Project and more.

Current Company

Drag a column header here to group by that column.

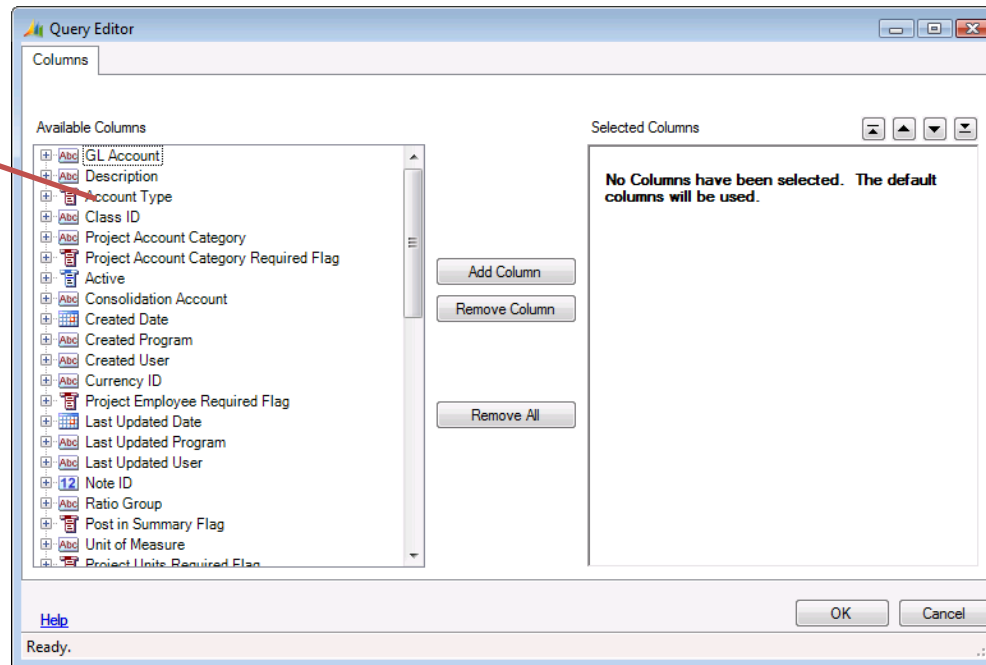
GL Account	Description	Account Type	Class ID	Project Account Category
2901	401k Accrued	2L	LIABILITY	
2050	A/P Trade-USD	2L	LIABILITY	
2070	A/P-Customer Refunds	2L	LIABILITY	
2065	A/P-Misc-USD	2L	LIABILITY	RETENTION AP
2060	A/P-Other-USD	2L	LIABILITY	
2071	A/R Customer Refunds	2L	LIABILITY	
1190	A/R Holding-USD	1A	CURRASSETS	UNBILL WORK PERF
1160	A/R Inter-Company-USD	1A	CURRASSETS	
2072	A/R Prepayment	2L	LIABILITY	
1110	A/R Trade-USD	1A	CURRASSETS	AR TRADE
6030	Accounting and Legal Fees	3E	EXPENSES	
2301	Accrued A/P Trade-CAD	2L	LIABILITY	
2303	Accrued A/P Trade-DEM	2L	LIABILITY	
2302	Accrued A/P Trade-FRF	2L	LIABILITY	
2304	Accrued A/P Trade-GBP	2L	LIABILITY	
2305	Accrued A/P Trade-LRA	2L	LIABILITY	
2300	Accrued A/P Trade-USD	2L	LIABILITY	
1918	Accrued Income Misc.	1A	ASSETS	
2340	Accrued Insurance	2L	LIABILITY	
2310	Accrued Interest	2L	LIABILITY	
1916	Accrued Investment Income	1A	ASSETS	
1917	Accrued Misc. Receivables	1A	ASSETS	
2350	Accrued Real Estate Taxes	2L	LIABILITY	
2320	Accrued Rent	2L	LIABILITY	
2330	Accrued Wages	2L	LIABILITY	
1621	Accumulated Depreciation	1A	ASSETS	
1140	Advances in Travel & Exp...	1A	CURRASSETS	CASH
6010	Advertising	3E	EXPENSES	ODCS
6570	Amort/Leasehold Improve...	3E	EXPENSES	

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Columns

The Columns window allows the display to be tailored

Choose which columns are displayed from any columns in the list



Controls allow for the change of column order while editing the query.

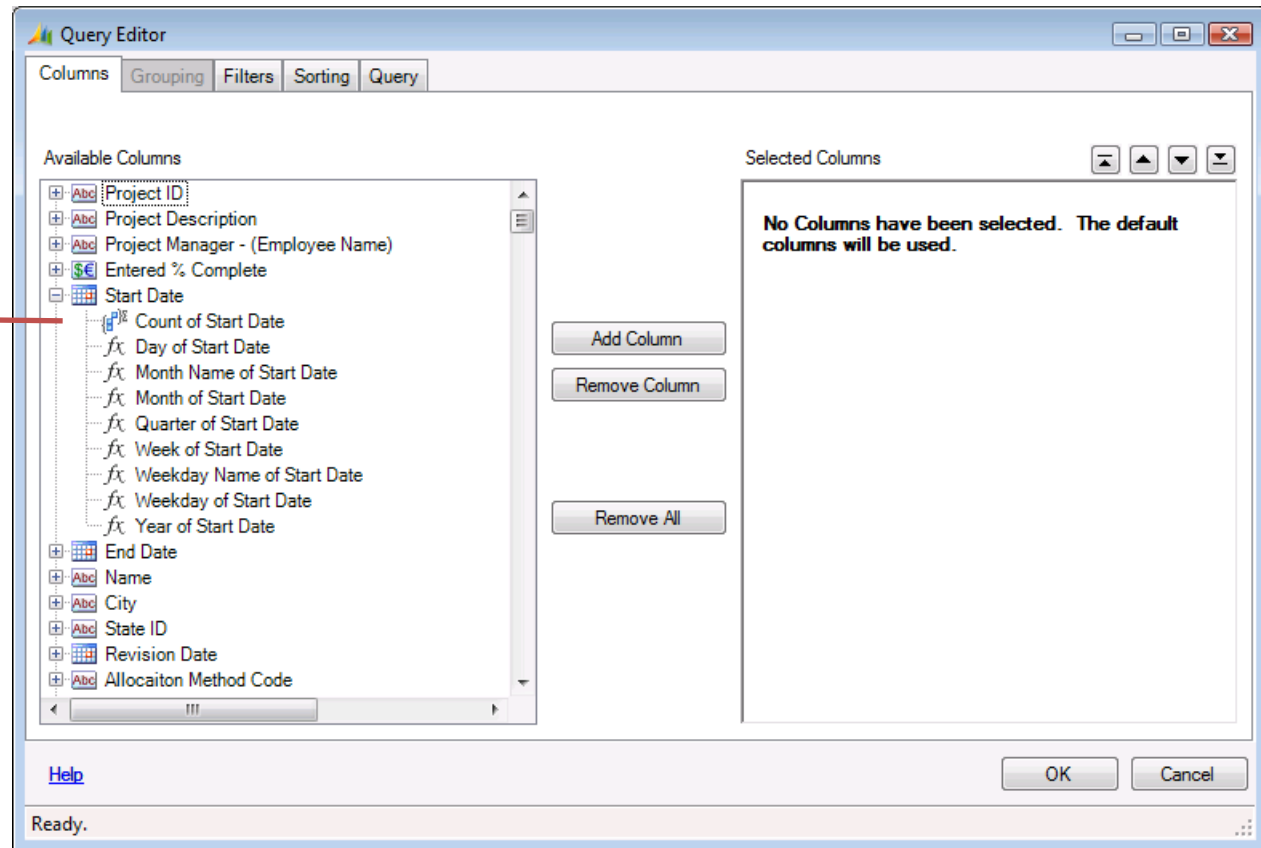
Column Metrics

Every Column has additional metrics automatically added for better analysis and inquiry

Here a date is automatically expanded to see the date parts, year, quarter, month, day, etc.

Currency and number columns include Sum, Average, Count, Minimum and Maximum.

Strings include unique metrics as well.



Search

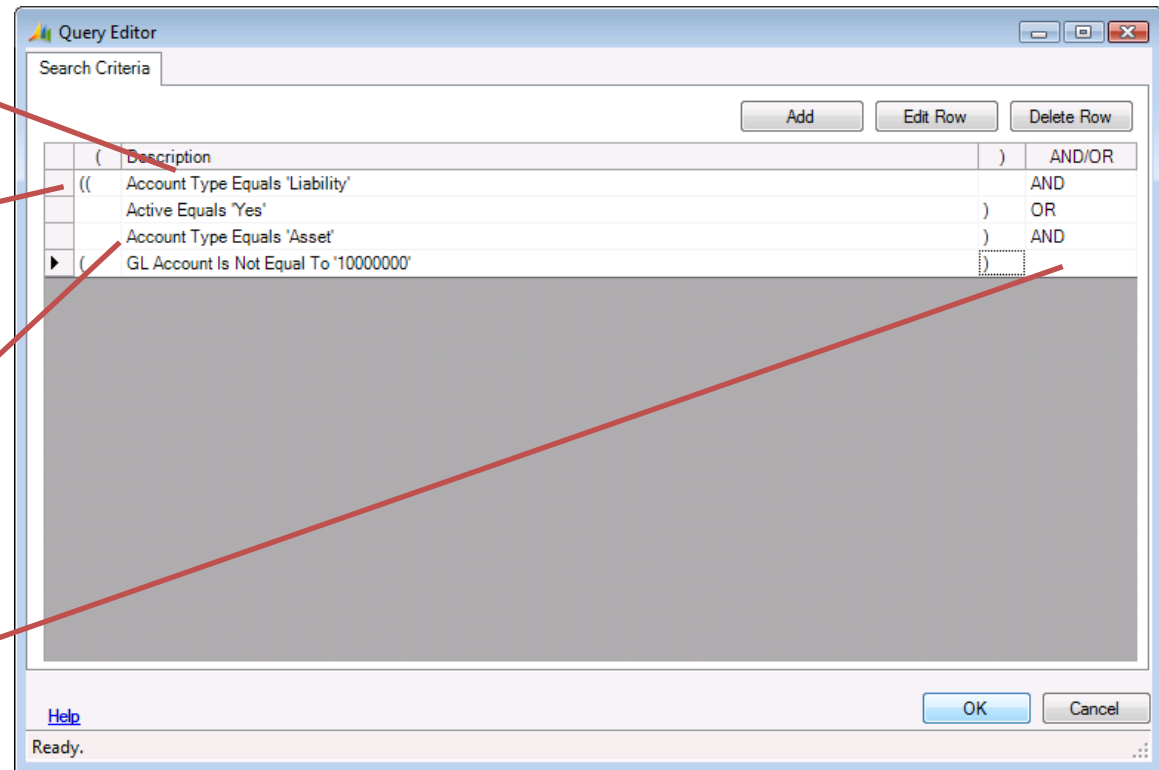
The Search window allows restrictions to be added

Search using any of the report columns

Create powerful queries with nested parenthesis

Search using known values for list fields

Employ AND / OR logic to maximize flexibility



Grouping

Groups can be created by drag and drop or by creating summarized queries

Here a simple list of Accounts is grouped by Account Type and a count is displayed in the group header.

The screenshot shows the 'Inquiry for Dynamics SL (ZI.INQ.00)' application window. On the left is a tree view of the account hierarchy. On the right, a table displays a grouped list of liability accounts. The table has columns for 'GL Account', 'Description', 'Class ID', and 'Project Account Category'. The rows are grouped by 'Account Type', with the group header 'Account Type : Liability (75 items)' expanded to show the data rows.

GL Account	Description	Class ID	Project Account Category
Account Type : Liability (75 items)			
2901	401k Accrued	LIABILITY	
2050	A/P Trade-USD	LIABILITY	
2070	A/P-Customer Refunds	LIABILITY	
2065	A/P-Misc-USD	LIABILITY	RETENTION AP
2060	A/P-Other-USD	LIABILITY	
2071	A/R Customer Refunds	LIABILITY	
2072	A/R Prepayment	LIABILITY	
2301	Accrued A/P Trade-CAD	LIABILITY	
2303	Accrued A/P Trade-DEM	LIABILITY	
2302	Accrued A/P Trade-FRF	LIABILITY	
2304	Accrued A/P Trade-GBP	LIABILITY	
2305	Accrued A/P Trade-LRA	LIABILITY	
2300	Accrued A/P Trade-USD	LIABILITY	
2340	Accrued Insurance	LIABILITY	
2310	Accrued Interest	LIABILITY	
2350	Accrued Real Estate Taxes	LIABILITY	
2320	Accrued Rent	LIABILITY	
2330	Accrued Wages	LIABILITY	
23301	Applied Labor	LIABILITY	
2100	Benefits Payable	LIABILITY	
2025	Bonds Payable	LIABILITY	
2090	Construction Advances	LIABILITY	
2080	Contracts Payable-Current	LIABILITY	
2530	Contracts Payable-LT	LIABILITY	
2075	Customer Deposits	LIABILITY	DEPOSITS

Multiple Levels of Detail

INQUIRY allows for expansion of details at multiple levels as needed

Here a list of projects is expanded to see Task detail, then Task detail is expanded to see Task Performance detail.

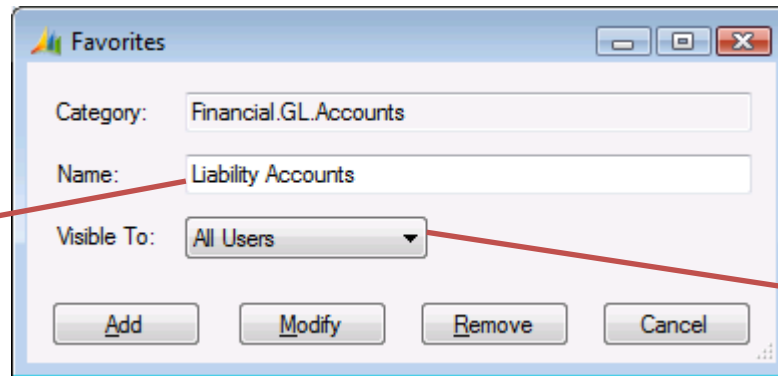
Project ID	Project Description	Project Manager	Company ID	Customer ID	Contract ID
CO123000	Business Re-engineeri...	E01239	0060	C315	CO123
Task ID	Project Task Descripti	Start Date	End Date		
AD00001	Accounting	1/10/1998	1/10/1998		
AD00002	Administrative Tasks	1/10/1998	1/10/1998		
AD00003	Travel Time	1/10/1998	1/10/1998		
Year	Period	Project to Date Amount	Project to Date Units	Variance	Total
1997	15	2,933.91	0.00	22,066.09	2,933.91
1997	15	3,379.57	28.00	16,620.43	3,379.57
1997	15	1,290.56	0.00	-1,290.56	1,290.56
1998	15	3,982.47	0.00	21,017.53	3,982.47
1998	15	4,692.40	34.00	15,307.60	4,692.40
1998	15	1,883.04	0.00	-1,883.04	1,883.04
1998	14	4,692.40	34.00	15,307.60	4,692.40
1998	14	1,883.04	0.00	-1,883.04	1,883.04
1997	14	2,933.91	0.00	22,066.09	2,933.91
1997	14	1,290.56	0.00	-1,290.56	1,290.56
1997	14	3,379.57	28.00	16,620.43	3,379.57
1998	14	3,982.47	0.00	21,017.53	3,982.47
1997	13	1,290.56	0.00	-1,290.56	1,290.56
1997	13	3,379.57	28.00	16,620.43	3,379.57
1998	13	1,883.04	0.00	-1,883.04	1,883.04
1998	13	3,982.47	0.00	21,017.53	3,982.47
1998	13	4,692.40	34.00	15,307.60	4,692.40
1997	13	2,933.91	0.00	22,066.09	2,933.91
1997	12	3,379.57	28.00	16,620.43	3,379.57
1998	12	3,982.47	0.00	21,017.53	3,982.47
1997	12	1,290.56	0.00	-1,290.56	1,290.56
1998	12	1,883.04	0.00	-1,883.04	1,883.04
1998	12	4,692.40	34.00	15,307.60	4,692.40
1997	12	2,933.91	0.00	22,066.09	2,933.91

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Favorites

The Favorites window allows any changes to be saved and used again

Name and save your frequently used searches



The screenshot shows a dialog box titled "Favorites" with a standard Windows window title bar (minimize, maximize, close buttons). It contains three input fields: "Category:" with the text "Financial.GL.Accounts", "Name:" with the text "Liability Accounts", and "Visible To:" with a dropdown menu showing "All Users". At the bottom, there are four buttons: "Add", "Modify", "Remove", and "Cancel". A red line originates from the "Name:" field and points to the text box on the left. Another red line originates from the "Visible To:" dropdown and points to the text box on the right.

Share your searches with other users

Excel Export

The Excel Export pushes the data out to a spreadsheet for further analysis

Exported lists maintain formatting and grouping when sent to Excel

The screenshot displays the Dynamics SL software interface with an Excel spreadsheet overlaid. The software window shows a tree view on the left with folders for Financial, GL, GL Transactions, Project, and Projects with Tasks and Performance Data. The main area shows a list of Reference Numbers and GL Accounts. The Excel spreadsheet, titled 'tmpBD06.xls [Read-Only] [Compatibility Mode] - Microsoft Excel', shows the exported data with columns for Reference Number, GL Account, Subaccount, and Transaction Description. The data is organized into groups, with each group header in a larger font and bolded. The groups include Reference Number, GL Account, and Subaccount. The Transaction Description column contains details for each transaction, such as 'Summary Release'.

Reference Number	GL Account	Subaccount	Transaction Description
Reference Number : 99999 (2 items)			
Reference Number : 987 (2 items)			
Reference Number : 654 (2 items)			
Reference Number : 321 (2 items)			
Reference Number : 200007 (4 items)			
Reference Number : 123 (4 items)			
GL Account : 1030 (4 items)			
Subaccount			
01100AA00001			
01100AA00001			
01100AA00001			
01100AA00001			
GL Account : 1110 (4 items)			
GL Account : 1157 (1 item)			
GL Account : 2006 (1 item)			
Subaccount			
01100AA00001			
Reference Number : 100007			
Reference Number : 100006			
Reference Number : 000092			
Reference Number : 000091			
Reference Number : 000090			
Reference Number : 00009 (
Reference Number : 000089			
Reference Number : 000088			
Reference Number : 000087			
Reference Number : 000086			
Reference Number : 000085			
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Reference Number : 000083			
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Reference Number : 000081			
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Reference Number : 000014			
Reference Number : 000013			
Reference Number : 000012			
Reference Number : 000011			
Reference Number : 000010			
Reference Number : 000009			
Reference Number : 000008			
Reference Number : 000007			
Reference Number : 000006			
Reference Number : 000005			
Reference Number : 000004			
Reference Number : 000003			
Reference Number : 000002			
Reference Number : 000001			

Actions

Actions allow drilling down into screens and drilling around to open other queries

Drag a column header here to group by that column.

Vendor ID	Name	Default Purchase Type	Status	Address Line 1	Add	
E01213	Wheeler~Wendy	Goods for Inventory	Active	765 Purple St	Apt	
E01214	Wood~John	Goods for Inventory	Active	3456 Green Lane		
E01215	Young~Rob	Goods for Inventory	Active	234 Raisin St		Findlay
E01217	Linda Mitchell	Goods for Inventory	Active			Findlay
E01218	Susan Metters	Goods for Inventory	Active	Ohio Street	P.O. Box 1	Findlay
E01219	Ken Myer	Goods for Inventory	Active			Findlay
E01220	Laura Norman	Goods for Inventory	Active	567 Railroad Ave		Findlay
E01221	Nixon~Toby	Goods for Inventory	Active	23 Brown Lane		Findlay
E01222	Clair Hector	Goods for Inventory	Active	56 Blue Street	Apt 678	Findlay
E01224	Houston~Peter	Goods for Inventory	Active	1234 Line Street		Findlay
E01225	Jordan~Katie	Goods for Inventory	Active	678 Circle Drive		Findlay
E01226	Jane Clayton	Goods for Inventory	Active	34 Square Blvd.		Findlay
E01228	Aaron Con	Goods for Inventory	Active	789 Main Ave		Findlay
E01229	Cooper~Scott	Goods for Inventory	Active	4567 Sunshine R...		Findlay
E01230	Stephanie Conroy	Goods for Inventory	Active	0002 Hill Drive		Findlay
E01231	Eva Corets	Goods for Inventory	Active	1234 Yellow Ave		Findlay
E01232	Rob Caron	Goods for Inventory	Active	099 Yellow Ave		Findlay
E01233	Chris Cannon	Goods for Inventory	Active			Findlay
E01234	Brenda Diaz	Goods for Inventory	Active			Findlay
E01237	Scott Culp	Goods for Inventory	Active			Findlay
E01238	Jim Geist	Goods for Inventory	Active			Findlay
E01239	Don Hall	Goods for Inventory	Active	456 Line Road		Findlay
E01243	Kathie Flood	Goods for Inventory	Active	890 Circle Lane		Findlay
E01244	Jon Grande	Goods for Inventory	Active			Findlay
E01245	Kelly Focht	Goods for Inventory	Active	12 Purple St		Findlay
E01247	Jim Kim	Goods for Inventory	Active	456 Tree Road		Findlay
E01248	Judy Lew	Goods for Inventory	Active	89 Brown Ave		Findlay
E01249	Mark Lee	Goods for Inventory	Active	34 Diamond Rd		Findlay
E01250	Mindy Martin	Goods for Inventory	Active	7890 Circle Ave		Findlay

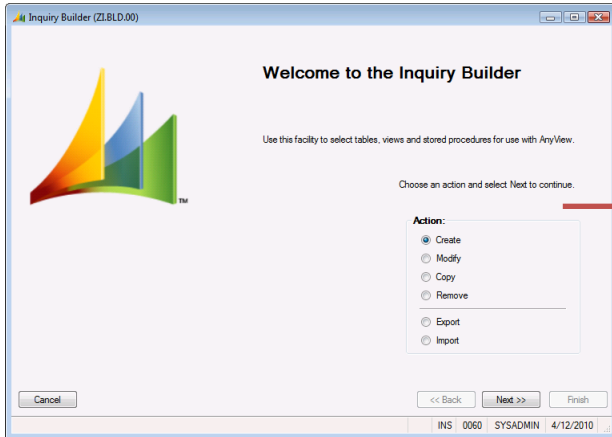
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Create a customizable list of maintenance and inquiry screens that can be opened from the Actions menu

The highlighted record is opened in the screen or passed to another query selected from the list of available Actions

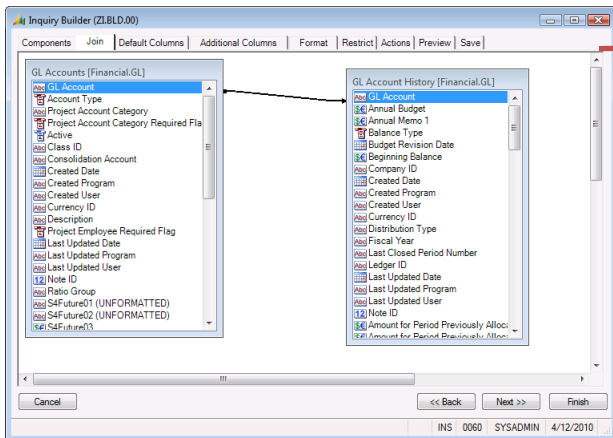
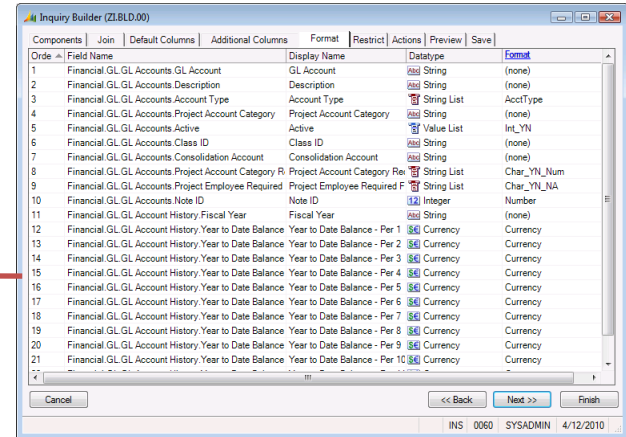
Create Custom Queries

INQUIRYBuilder allows you to build custom queries



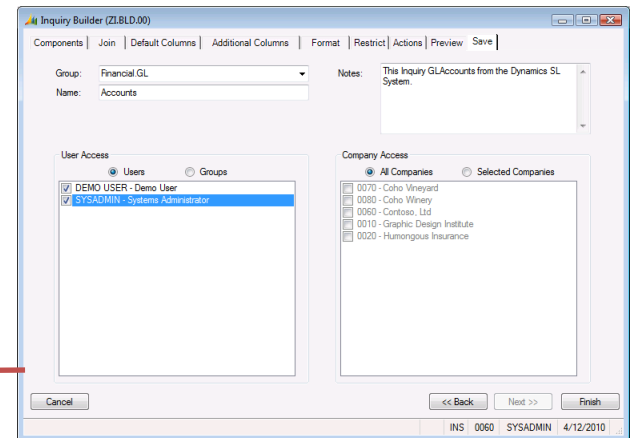
Queries can be created copied and modified for the most flexible query design.

Friendly Table and Column names make query building easy for SL Users.



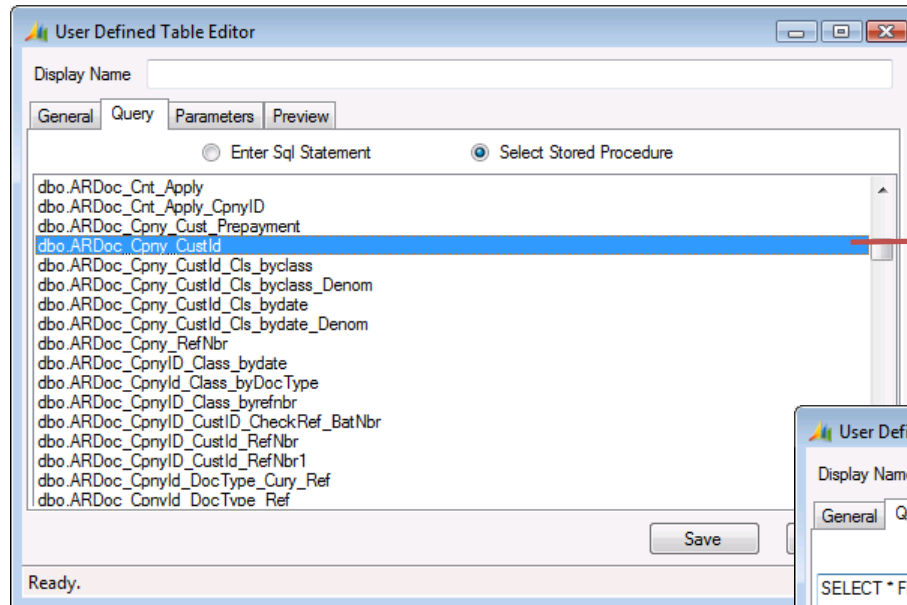
The graphical interface, including visual joins, makes building queries smooth.

Security is integrated into the SL Screen model making it simple to administer.



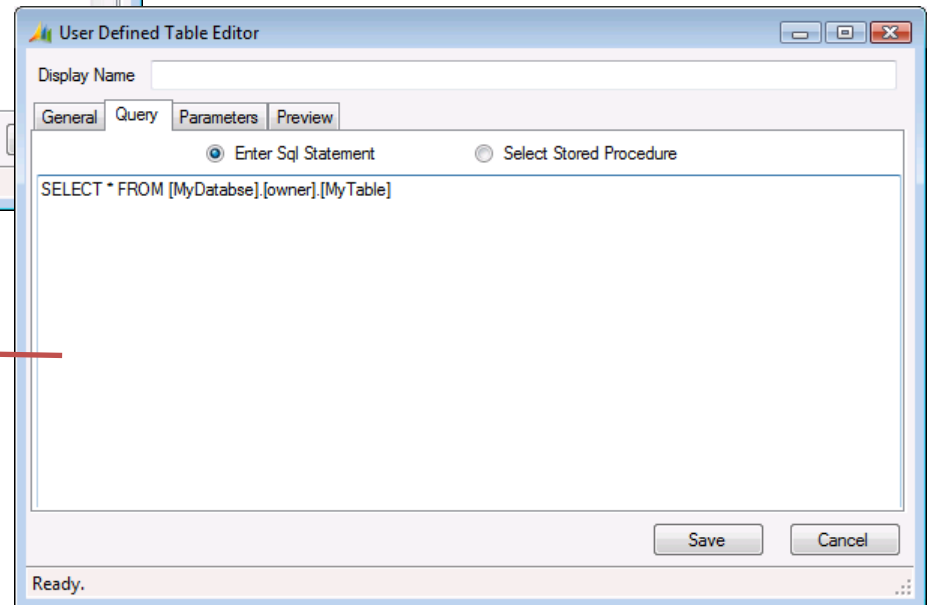
Any Data Source

When building queries use Tables, Views, Stored Procedures and even handwritten SQL statements and access any database in your environment!



Access any database to pull data from any source including Stored Procedures then pass parameters down to the end user for the ultimate in query control.

Handwritten SQL Queries offer flexibility in data access. With the inclusion of scripted parameters **INQUIRY** offers data access possibilities unlike any other Dynamics SL Query tool on the market.



LIST - SEARCH - NAVIGATE - PERSONALIZE - EXPORT - CUSTOMIZE - CREATE

INQUIRY



for

Microsoft Dynamics SL