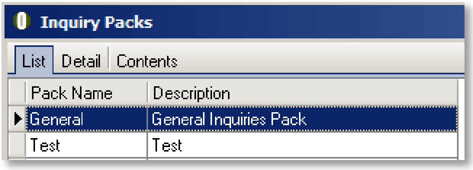
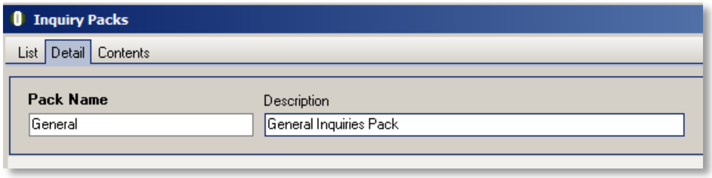
How to create a Freeway Inquiry Pack

Following is a step-by-step guide on how to create a Freeway Inquiry Pack using the Ostendo Mobility Menu.
An Inquiry Pack Name can be assigned to an employee in the Employee Mobility Settings. This means you could set up different inquiries for different employees.

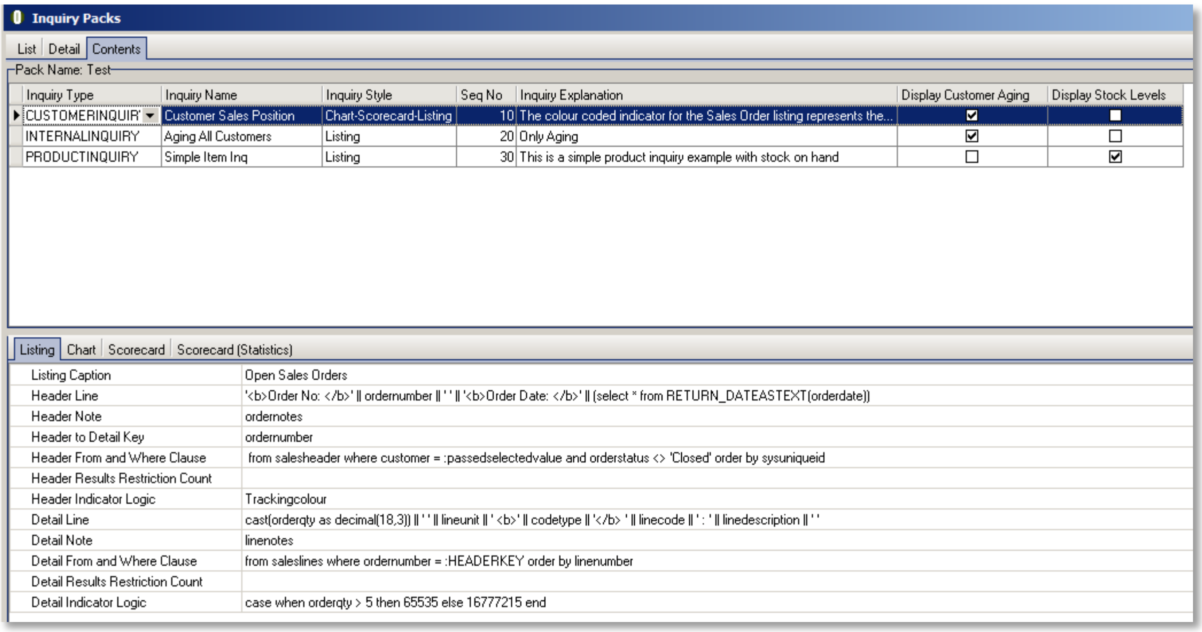
1. Click on Mobility Menu – **Inquiry Packs**





Click the Add button to add a record.
In the Detail tab, enter a **Pack Name** and **Description**.
Next, click on the Contents tab.

2. The Contents tab and sub-tabs is where you define all the inquiries for this pack.



Add a record to define an Inquiry.

Inquiry Type: Select a Type from the drop-down list. Options are:

ASSEMBLYINQUIRY	-	Inquiry by selecting Assembly OrderNumber
CUSTOMERINQUIRY	-	Inquiry by selecting Customer
DELIVERYINQUIRY	-	Inquiry by selecting Delivery Number
INTERNALINQUIRY	-	General inquiry not linked to any specific customer/job/assembly/delivery/supplier/product

JOBINQUIRY	-	Inquiry by selecting Job OrderNumber
PRODUCTINQUIRY	-	Inquiry by selecting Itemnumber or DescriptorNumber
SUPPLIERINQUIRY	-	Inquiry by selecting Supplier

Inquiry Name: Enter a name for this inquiry. This will be displayed as the title of this Inquiry.

Inquiry Style: Select the appropriate style from the drop-down list. Options are:

- CHART - Only a chart is displayed in this inquiry.
- CHART-SCORECARD - The inquiry displays both a chart and a scorecard (KPI values)
- CHART-SCORECARD-LISTING - The inquiry displays a chart, a scorecard, and a listing
- CHART-LISTING - The inquiry displays a chart and a listing
- SCORECARD - The inquiry displays a scorecard only
- SCORECARD-LISTING - The inquiry displays a scorecard and a listing
- LISTING - The inquiry displays a listing only

Seq No: Enter a sequence number for the inquiry.

Inquiry Explanation: Enter a brief explanation of the Inquiry. This will be displayed under the title when the inquiry is run.

Display Customer Aging: Tick this Checkbox if Customer Aging balances are to be included in the inquiry. (Applicable to CUSTOMERINQUIRY / INTERNALINQUIRY).
If selected, Aging data will be displayed first before Chart/Scorecard/Listing.

Display Stock Levels: Tick this Checkbox if Stock Levels are to be displayed in the Inquiry. (Applicable to PRODUCTINQUIRY).
If selected, Stock Levels will be displayed first before Chart/Scorecard/Listing.

Each record adds an inquiry to the contents of the Pack.
You can add in as many records/inquiries as required.

The following sub-tabs at the bottom section of the screen are used to specify the parameters required to generate the inquiry style.

3. ***Listing sub-tab***:
If the inquiry style includes listing, then this tab needs to be filled in for that Inquiry record.

Listing | Chart | Scorecard | Scorecard (Statistics)

<table>
<tr><td>Listing Caption</td><td>Open Sales Orders</td></tr>
<tr><td>Header Line</td><td>'Order No: ' || ordernumber || ' ' || 'Order Date: ' || (select * from RETURN_DATEASTEXT(orderdate))</td></tr>
<tr><td>Header Note</td><td>ordernotes</td></tr>
<tr><td>Header to Detail Key</td><td>ordernumber</td></tr>
<tr><td>Header From and Where Clause</td><td>from salesheader where customer = :passedselectedvalue and orderstatus <> 'Closed' order by sysuniqueid</td></tr>
<tr><td>Header Results Restriction Count</td><td></td></tr>
<tr><td>Header Indicator Logic</td><td>Trackingcolour</td></tr>
<tr><td>Detail Line</td><td>cast(orderqty as decimal(18,3)) || ' ' || lineunit || ' ' || codetype || ' ' || linecode || ' : ' || linedescription || ' '</td></tr>
<tr><td>Detail Note</td><td>linenotes</td></tr>
<tr><td>Detail From and Where Clause</td><td>from saleslines where ordernumber = :HEADERKEY order by linenumber</td></tr>
<tr><td>Detail Results Restriction Count</td><td></td></tr>
<tr><td>Detail Indicator Logic</td><td>case when orderqty > 5 then 65535 else 16777215 end</td></tr>
</table>

Listing Caption: Enter a descriptive caption for this Inquiry listing. (Example: **Open Sales Orders**)

Header Line: enter the labels and fieldnames of the header record to be displayed here.

Example: **'Order No: ' || ordernumber || ' ' || 'Order Date: ' || (select * from RETURN_DATEASTEXT(orderdate))**

Explanation: This whole string is made up of : Label1 || Field1 || space || Label2 || Field2
where Label1 ('Order No: ') is displayed as **Order No:**

Field1 (ordernumber) is the value of ORDERNUMBER from SALESHEADER table
Label2 ('Order Date: ') is displayed as **Order Date:**
Field2 in this example uses a special Procedure (RETURN_DATEASTEXT) to convert the date field (orderdate) into a text field.

Header Note: (Optional) Enter the note fieldname where the header notes is coming from. Use this if you wish to display notes from the table into your listing.
(Example: **ordernotes**)

Header to Detail Key: Optional. Enter the fieldname of the keyfield that links the detail records to the header record. If you have detail records to display, then use this to link the header and detail records.
(Example: **ordernumber**)

Header From and Where Clause: Enter the From and Where clause for the SQL statement used to extract the required header records.

Example: **from salesheader where customer = :passedselectedvalue and orderstatus <> 'Closed' order by sysuniqueid**

Explanation: In this example, the :passedselectedvalue is the Customer you selected when initiating this inquiry.

For other inquiries, the **:passedselectedvalue** could be the Assembly/Job ordernumber, DeliveryNumber, ItemNumber, DescriptorNumber, or Supplier.

You can also use **:passedemployee** (which refers to the mobility user name) in the inquiry as well where appropriate.

So in this example, the SQL Select statement for the Header Lines in the Listing becomes:

```
Select '<b>Order No: </b>' || ordernumber || ' ' || '<b>Order Date: </b>' || (select * from
RETURN_DATEASTEXT(orderdate))
from salesheader
where customer = :passedselectedvalue and orderstatus <> 'Closed'
order by sysuniqueid
```

Header Results Restriction Count: If you wish to restrict the number of Header records displayed,then enter the number here.

Header Indicator Logic: Optional. Either enter the Colour field name or a CASE statement to define when a certain colour should be displayed. This is used to highlight the header record by displaying the appropriate colour in a box next to the header record.

Example1: **trackingcolour**
Explanation1: This will simply display whatever the TrackingColour is for that header record.

Example2: **case when (orderdate < (current_date - 365)) then 255 else 16777215 end**
Explanation2: This case statement highlights those orders whose date is older than one year with a RED (255) colourbox. Others will have a WHITE (16777215) colourbox.

There is an analysis view in Mobility Menu - Views which displays all the available colours and the associated numbers. You can use this colour chart to select the colours you wish to use with your case statement.

Detail Line: Optional. Enter the labels and fieldnames of the detail record to be displayed here.

Example: **cast(orderqty as decimal(18,3)) || ' ' || lineunit || ' ' || codetype || ' ' || linecode || ' : ' || linedescription || ' '**

Explanation: This whole string is made up of : Field1 || space || Field2 || space || Field3 || space || Field4 || : || Field5 || space
where Field1 is ORDERQTY cast as decimal(18,3)
Field2 is LINEUNIT
Field3 is CODETYPE highlighted in bold
Field4 is LINECODE

Field5 is LINEDESCRIPTION

Detail Note: Enter the note fieldname where the detail notes is coming from. Use this if you wish to display notes from the table into your listing.
(Example: **linenotes**)

Detail From and Where Clause: Enter the From and Where clause for the SQL statement used to extract the required detail records.

Example: **from saleslines where ordernumber = :HEADERKEY order by linenumber**

Explanation: **:HEADERKEY** is a reserved word that holds the value of the fieldname indicated in "Header to Detail Key".

In this example, the SQL Select statement for the Detail Lines in the Listing becomes:

Select cast(orderqty as decimal(18,3)) || ' ' || lineunit || ' ' || codetype || ' ' || linecode || ' : ' || linedescription || ' '
from saleslines
where ordernumber = :HEADERKEY
order by linenumber

Detail Results Restriction Count: If you wish to restrict the number of Detail records displayed, then enter the number here.

Detail Indicator Logic: Optional. Either enter the Tracking code field name or a cast statement to define when a certain colour should be displayed.
(Refer to examples in Header Indicator Logic).

4. ***Chart sub-tab***:
If the inquiry style includes Chart, then this tab needs to be filled in for that Inquiry record.
For Inquiries, only horizontal Bar charts are available.

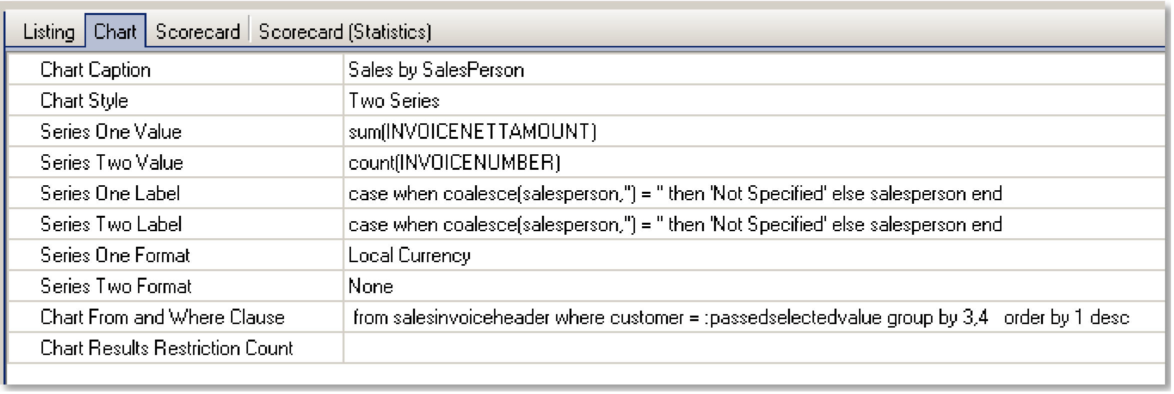

Listing | Chart | Scorecard | Scorecard (Statistics)

Chart Caption	Sales by SalesPerson
Chart Style	Two Series
Series One Value	sum(INVOICENETTAMOUNT)
Series Two Value	count(INVOICENUMBER)
Series One Label	case when coalesce(salesperson,'') = '' then 'Not Specified' else salesperson end
Series Two Label	case when coalesce(salesperson,'') = '' then 'Not Specified' else salesperson end
Series One Format	Local Currency
Series Two Format	None
Chart From and Where Clause	from salesinvoiceheader where customer = :passedselectedvalue group by 3,4 order by 1 desc
Chart Results Restriction Count	

Chart Caption: Enter a caption for the chart. This will be displayed as the title of the chart. (Example: **Sales by Country**)

Chart Style: Select one of the options from the drop-down list:

Single Series : Chart is based on the values of one series as defined in Series One Value.
Two Series : Chart is based on the values of two series as defined in Series One and SeriesTwo Value.
Percentage Series : The value is expressed as a percentage of the total values of all selected records.
Percentage Series require only the Series One Value and Series One Label to be filled in.

Series One Value: Enter the fieldname or aggregate expression here for the first series or for the Percentage Series.

Example: **SUM(INVOICENETTAMOUNT)**

Series Two Value: This is applicable only to Two Series charts. Enter the fieldname or aggregate expression here for the second series.

Example: **COUNT(INVOICENUMBER)**

Series One Label: Enter the label for the first series or Percentage series. This can be a text string, a fieldname or a case statement.

Example: **case when coalesce(billingcountry,'') = '' then 'Not Specified' else BillingCountry end**

Series Two Label: This is applicable only to Two Series charts. Enter the label for the second series.This can be a text string, a fieldname or a case statement.

Example: **case when coalesce(billingcountry,'') = '' then 'Not Specified' else BillingCountry end**

Series One Format: Select one of the drop-down options:(**None, Local Currency, FX Currency,Decimal**). This is used to format the values displayed in Series One.

Series Two Format: Select one of the drop-down options:(**None, Local Currency, FX Currency,Decimal**). This is used to format the values displayed in Series Two.

Chart From and Where Clause: Enter the From and Where clause for the SQL statement used to extract the required data for this chart.

Example: **from salesinvoiceheader where customer = :passedselectedvalue group by 3,4 order by 1 desc**

Explanation: The "group by" clause is only used when Series One Value or Series Two Value is an aggregated value.

The number 1 refers to Series One Value;
2 refers to Series Two Value,
3 refers to Series One Label, and 4 refers to Series Two Label.

So for this chart, the SQL Select statement becomes like this:

```
Select sum(INVOICENETTAMOUNT), count(INVOICENUMBER),
case when coalesce(billingcountry,'') = '' then 'Not Specified' else BillingCountry end,
case when coalesce(billingcountry,'') = '' then 'Not Specified' else BillingCountry end
from salesinvoiceheader
where customer = :passedselectedvalue
group by 3,4
order by 1 desc
```

Like your typical SQL statement, always group by the numbers which are not aggregate values.

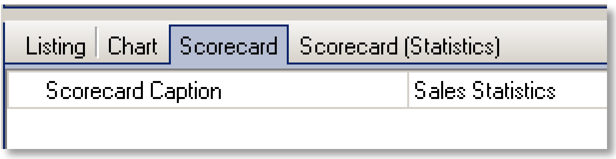
In this example, the :passedselectedvalue is the Customer you selected when initiating this inquiry.

For other inquiries, the **:passedselectedvalue** could be the Assembly/Job ordernumber, DeliveryNumber, ItemNumber, DescriptorNumber, or Supplier.

You can also use **:passedemployee** (which refers to the mobility user name) in the inquiry as well where appropriate.

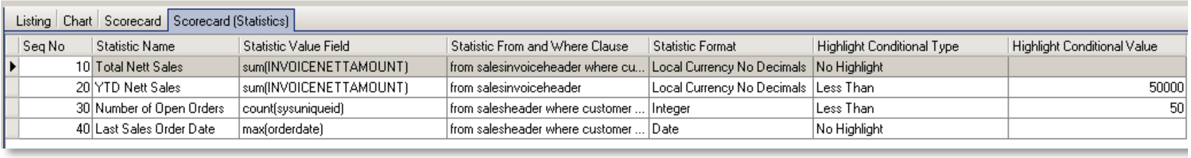
Chart Results Restriction Count: If you wish to restrict the number of records displayed, then enter the number here.

5. ***Scorecard sub-tab***:
If the inquiry style includes Scorecard, then this tab and the Scorecard (Statistics) tab needs to be filled in for that Inquiry record.



Scorecard Caption: Enter the caption for the Scorecard here.

Scorecard (Statistics) sub-tab:
You can have multiple statistics displayed in the Scorecard.



Seq No	Statistic Name	Statistic Value Field	Statistic From and Where Clause	Statistic Format	Highlight Conditional Type	Highlight Conditional Value
10	Total Nett Sales	sum(INVOICENETTAMOUNT)	from salesinvoiceheader where cu...	Local Currency No Decimals	No Highlight	
20	YTD Nett Sales	sum(INVOICENETTAMOUNT)	from salesinvoiceheader	Local Currency No Decimals	Less Than	50000
30	Number of Open Orders	count(sysuniqueid)	from salesheader where customer ...	Integer	Less Than	50
40	Last Sales Order Date	max(orderdate)	from salesheader where customer ...	Date	No Highlight	

Seq No: Enter the sequence number of the statistic here.

Statistic Name: Enter the name of the statistic here.

Statistic Value Field: Enter the fieldname or aggregate expression here.
Example: **sum(INVOICENETTAMOUNT**)

Statistic From and Where Clause: Enter the From and Where clause for the statistic's sql statement here.

Example: **from salesinvoiceheader where customer = :passedselectedvalue**

Explanation: In this example, the :passedselectedvalue is the Customer you selected when initiating this inquiry.

For other inquiries, the **:passedselectedvalue** could be the Assembly/Job ordernumber, DeliveryNumber, ItemNumber, DescriptorNumber, or Supplier.

You can also use **:passedemployee** (which refers to the mobility user name) in the sql as well where appropriate.

Statistic Format: Select the appropriate option for this statistic from the drop-down list.
Options are:

Date
Decimal
Integer
Local Currency
Local Currency No Decimals
Text

Highlight Conditional Type: Select the Highlight Conditional Type and the corresponding Conditional Value if you wish to highlight each statistic based on certain conditions. Options are:

No Highlight	
Equal To	the Conditional value
Greater Than	the Conditional value
Less Than	the Conditional value

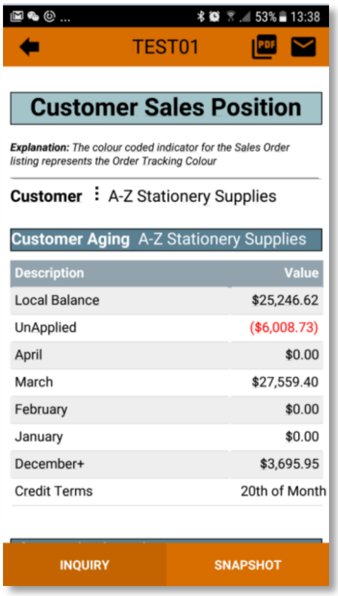
Highlight Conditional Value: Enter the Conditonal value for the corresponding Highlight Conditional Type. This is a decimal value.

You can click the **Add button** to add another statistic.

Once you have completed defining all the inquiries in this pack, you can then start assigning this Inquiry Pack name to one or more employees in the Employee Mobility Settings screen.

When the employees next synchronize their Freeway mobile device, they can click on the Inquiry button in the Main Screen to access these inquiries.

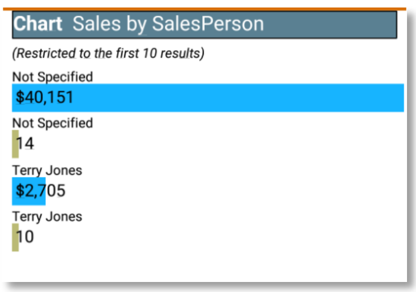
Sample screenshots of a Freeway Inquiry:



Inquiry Name

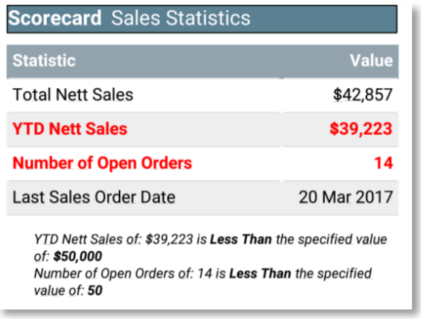
Inquiry explanation

Aging Data



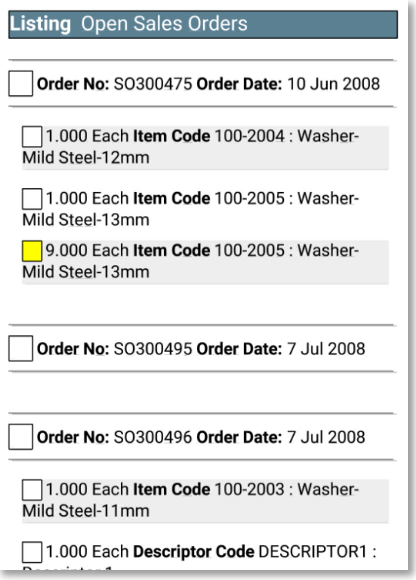
Example of a **Two Series chart**.
You can also define a **Single Series**, or **Percentage Series** charts.

You can restrict the displayed results to a fixed number if desired.



Scorecard:
In this example, the scorecard displays four sales statistics: Total Nett Sales, YTD Nett Sales, Number of Open Orders, and Last Sales Order Date.

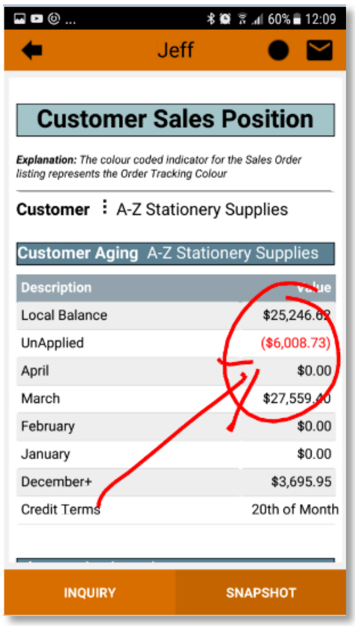
Some of the statistics can be conditionally highlighted in bold and red (e.g. if YTD Nett Sales is less than $50,000)



Listing:
This Listing example displays Header and Detail data.
The Label captions for each field are all user-defined.
In this example, only the Header has label specified for the two fields (Order No. and Order Date).

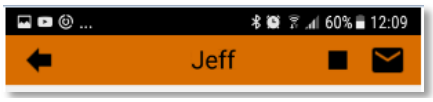
Labels are optional.
In this example, no labels are used in the Detail Lines. Only the CODETYPE field is highlighted in bold.

If desired, Indicator Logic can be specified for both Header and Detail data to highlight certain records in the inquiry.
A color-indicator box will appear at the start of each line with the appropriate colour if **Indicator Logic** is specified.



Snapshot, Annotate, Audio Note & Email:
When you hit the **Snapshot button**, you create a screen image and you can immediately **annotate it**.

You can also press the **Record button** to record an audio note. (The **round black button** next to the Email button at top right of screen.) This button will turn into a **square black button** when you press it to



Press the square button to stop recording your audio note.

Press the **Email button** (envelope symbol) to email the screenshot and audio note to someone.

This concludes this brief introduction on how to create a Freeway Inquiry Pack.

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