

How to Query

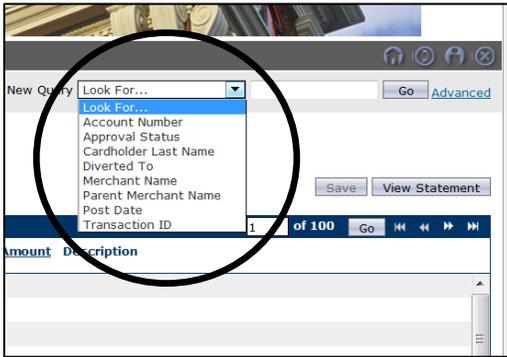
A query is basically a search. This will walk you through how to use basic queries in PNet4. Reconcilers will be doing queries on Transactions and Reports. There are two types of queries you can do in PNet4: Quick and Advanced.

To Run a Quick Query

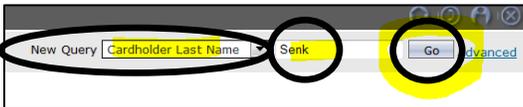
- Go to “Transaction List” Page
 - This will work on any screen that has this. Most users will only have the ability to see “Transactions”.
- Look in the top right corner of the “New Query” box



- Select a Value from the drop down box to search by.
 - Example below is from the “Transactions” list of choices



- All Quick Queries are done as “Begins with”
 - This means it only searches for the provided text as the beginning of the word being looked for, not a whole word match
 - Example: if I wanted to look for “apple”, I could just type “app”).
 - **NOTE:** For queries on “Account Number”, “Post Date” or “Transaction ID#”, only use whole values.
- Enter a value in the box on the right and click on ‘Go’ (or ‘Enter’ on the keyboard) to execute the query.



- Results will come up on the screen for you to look at. Use “Advanced” if this kind of search is inadequate for your data needs.

To Run an Saved Query

A set of pre-made queries has been provided to see transactions commonly asked for in Pcard transactions.

- Go to “Transaction List” Page; look right above the list of results. The drop down box in the top left corner is the list of saved queries.



- Use the drop down box to choose from a list.

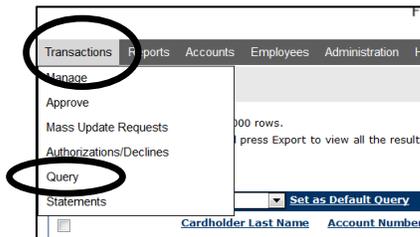


- When you click on the query you want, it will automatically run it right then.
 - You cannot set any additional parameters on this search. For that use an Advanced Query.
- “Flag” reports show if something was tagged by the system for a possible infraction. Flags are just an automated heads up. They do not necessitate anything is wrong with the transaction, only that it should be looked at to verify nothing is wrong.
 - Flags look for two kinds of issues:
 - Transactions over \$5k.
 - Looking for Capital items that should be inventoried.
 - Also looking for possible Direct Buy Limit (\$10k and over) issues.
 - More than 1 transaction with the same merchant on the same day.
 - Looking for Stringing/Stepping issues.
 - It is recommended to put a few notes by the Reconciler in the “transaction Notes” section to explain any flags.

To Run an Advanced Transaction Query

Advanced queries are an information search with a few more options than a Quick Search. Much of PNet4 is based around getting info from queries, so this is a very helpful tool.

- There are two ways to access the Advanced Queries page.
 - Navigate Directly to it.
 - Under “Transactions”, click on ‘Query’ and you will be taken there.



- The ‘Advanced’ Button
 - Go to “Transaction List” Page
 - This will work on any screen that has this.
 - Click on ‘Advanced’



- You should now be on the Advanced Query page:

- **Sections**

The Advanced Query page allows searching by a combination of elements.

- **Date Range**

- Allows you to choose the time frame you want data from.
 - It is recommended to search for more than the defaulted value of 30 days (i.e. 35+).
 - This is because 30 days will not always capture a whole month/cycle of data.
 - The **“And/Or”** modifier
 - If you add more than one line of criteria, an additional box will show up on the left side of all criteria lines added after the first line.

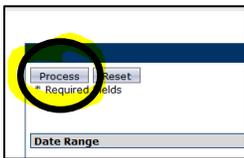
- This allows you to choose how the multiple lines of criteria interact with each other.
 - **“And”**
 - This means the line of criteria “And” is next to must be true at the same time as the line directly above it.
 - This tends to give very few results because you are cross-referencing multiple queries and pulling out only those that match.
 - i.e. as a purely made-up example: If I wanted to search a food database for “fruit”, then added criteria of “begins with” + “B”, and chose the “And” to join them, I would get results for all fruit that also started with the letter B, and nothing else.
 - So – a banana basically
 - **“Or”**
 - This means that the line of criteria that “Or” is next will report all results that match that criteria line as true, and in addition it will also report all results of the line above it that report true as well (i.e. 2 sets of results).
 - This tends to give a large set of values back because it is basically the equivalent if running multiple queries at once. “Or” is usually used much less often than “And” in queries.
 - i.e. as a purely made-up example: If I wanted to search a food DataBase (DB) for “fruit”, then added criteria of “begins with” + “B”, and chose the “Or” to join them, I would get results for all fruit, as well as I would also get all food that started with the letter B.
 - So – every single fruit in the food DB would come up, and then you would also get every single food that starts with “B” would also come up.

- NOTE: This would be a long list. Compare that to the list on the “and” example above that came back with one result. Huge difference in results based on a single field marked one way or another. Be mindful of how you set this field.
 - The “And/Or” field is also found in the “Criteria” section and works in the same fashion there.
- Criteria

This is the most important section of a query as this is where you will define the actual values you will be looking up. The query will need 3 fields entered in order to define the search.

 - Left field/box – “Field”
 - This is the type of information you are searching for.
 - This typically corresponds to the list of titles/headers you see on the results screen.
 - This list is not Dynamic and cannot be adjusted. If you do not see it, it cannot be used.
 - Middle field/box – “Operation”
 - This is a Quantifier of how you are searching. Used to adjust how the “value” will be looked up for the “Field”.
 - 3 most commonly used quantifiers are:
 - “**Is equal to**”
 - Used for exact match searches of the whole text entered, and only that text.
 - Need to be careful, because if you misspell the word you will not get the desired results
 - “**Begins with**”
 - Used to find anything that starts with the text provided
 - i.e. Query of “Merchant Name” that “Begins With” “Offi” may get you results like Office Depot, Office Max, etc...
 - Very useful where the whole text is not needed, like in last name searches.
 - “**Contains**”
 - Used to find the string of text provided anywhere, even inside a word.
 - i.e. Query of “Merchant Name” that “Contains” “Depot” may get you results like Office Depot, Home Depot, etc...
 - This is a powerful tool because you may not always know the exact name of a merchant, or what word in their name comes exactly first. Search for the part of the name that you do know.
 - Right field/box – “Value”
 - Value of what you are searching for. Simply input the value here.
 - The “Value” field is changed based on the “Field” and “Operation” values chosen. It can allow only text or numbers, or have just 1 box or more, based on which selections come before it.
 - i.e. A “Field” of ‘Transaction ID’ will set the “Value” for only numerical values.
 - i.e. An “Operation” of ‘Is Between’ will set the “Value” to have two boxes for each input instead of just one.
 - What should you input in “Value”?
 - Less is more. Only type in what is needed. Extra text can cause matching errors.
 - Watch typos. If you mistype the inputted info, you will not get the data you are looking for.

- “And/Or” field
 - See the “Date Range” section above for a breakdown of how this works.
- For additional tips on query input values, see the guide from JPMC at the end of this section for some great tips (see “Best Practices for Constructing Queries”).
- Hierarchy
 - If you have been granted access to more than one dept., you can specify which dept. folder you want to look at here.
- Order By
 - This is just a basic sorting feature. It is here because some reports are not dynamic (i.e. PDF vs Excel) and you cannot sort within the report itself, so here you can control what order the results are shown by.
 - Optional field to use; not required.
 - If no criteria is selected, results will show in the order of:
 - Transaction - the “Post Date” of the transaction in descending order from the most current result.
 - Other reports or features will be sorted by Alphabetical order.
 - Click on the “+” if you want to add a criteria.
 - Multiple lines of criteria can be added.
- Once all of the data has been entered and you are ready for the query to execute, simply click on “Process”

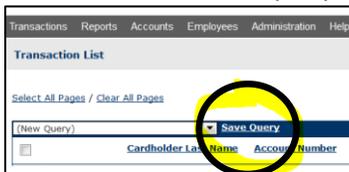


- You should now be on the Transaction List page and should see the results of your query.
 - You will only see results of data that you have access to. You cannot query for transaction information from cards you are not assigned to.
 - Beware of False Positives. If you type in a query and get no results, it may be because the info you entered is incorrect – not that there are no results to be found.

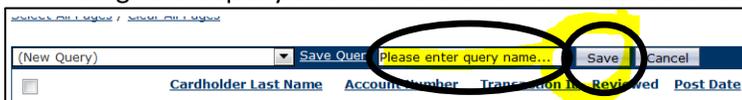
To Save a Query

If you have to run a rather long or complex advanced query, you can save it. This way you can return to it with ease later and adjust it as opposed to creating the whole query over again from scratch.

- Once a successful query has been run, just click on ‘Save’ on the results screen



- Then give the query a name and click on the next ‘Save’ button.



Saved Queries will show up on drop down box list as the name you saved it under. These saved queries can then also be set as your Default Query.

Default Query

To set your Default Query - run a successful Advanced query, and then save it (see: **To Save a Query**). Go to the drop down box of saved queries, and select the one you want to be your default and click on it. After it successfully runs, click on the 'Set as Default Query' button from the results page.



Now every time you navigate to the Transactions page, it will populate the page with the results from the Default Query you set. You can set any default query you wish to. The system will have 'Last 30 days (system)' set as your initial Default Query. Once a new query is set as the new default, you will be able to tell as the name will now indicate this with "(default)" at the end of the name.



We recommend creating your own query and saving as your default one. The following advanced transaction query is one that would be a great one to have as your default Query:

- Go to the tab Transactions → Query from any page, or click on 'Advanced' from the "Transaction View" page.
- Set the "Date Range" to: "Post Date" + "Is Relative" + "Last Days" + "90"
- Set the "Criteria" to: "Exported" + "Is Equal To" + "[]" (leave the box as unchecked)
- Only set the "Hierarchy" and "Order By" sections if you need to.

 A screenshot of an advanced query configuration form. At the top left are 'Process' and 'Reset' buttons. Below them is a 'Required Fields' section. On the right is a 'Query' dropdown set to '(New Query)'. The form is divided into several sections:

- Date Range:** A table with columns 'Field', 'Operation', and 'Value'. Row 1: Field 'Post Date', Operation 'Is Relative', Value 'Last Days' with a dropdown and '90' in a text box.
- Criteria:** A table with columns 'Field', 'Operation', and 'Value'. Row 1: Field 'Exported', Operation 'Is Equal To', Value an empty checkbox.
- Hierarchy:** A section with 'Include Children' and a '+' button.
- Order By:** A section with 'Field' and 'Order Sequence' and a '+' button.

Now you can 'Process' the query, then 'Save Query', and name it. Once that is done, you can select it from the Saved Queries drop down box, and then set it as your default. This will work very similar to the default query that ran in Legacy for all users in that it will give you all recent unreconciled transactions.

To Delete a Query

From the drop down box of saved queries, select and run the saved named query you want to delete. Once ran, a choice to delete the query from the list will appear. Click on 'Delete Query' to remove it from the list. If it set as the default query, the system will revert back to have 'Last 30 days (system)' as the default.



JPMC Links on Topic:

- [Best Practices for Constructing Queries](#)
- [Creating a Quick Query](#)
- [Creating an Advanced Query – Transactions](#)
- [Edit a Query](#)
- [Setting a Default Query](#)
- [Saving a Query](#)