

# GL Query Builder Overview and Topics

Last Modified on 01/10/2023 4:01 pm EST

The GL Query Builder is a tool that enables SedonaOffice Users to create custom reports based on your company's data that is stored in the SedonaOffice database. A GL Query Builder report design builds a SQL query behind the scenes to be able to display selected data. All reports are based on data that relates to transactions posted to the General Ledger. To be able to use this tool effectively, Users should have a good working knowledge of the SedonaOffice application and how data is entered, linked and stored.

This tool is used to produce a list of information based upon the criteria selected by the User when designing the query for the report. The GL Query Builder does not perform any mathematical calculations. Report query results may be exported to and opened with a spreadsheet type application such as Microsoft Excel, where totals, subtotals or calculations may be added. This reporting tool is referred to as the GLQB.

After designing a report query, the User may save the query to be used again in the future. Reports may be printed or exported to a .csv file format which may be opened using Microsoft Excel or any other third-party software application capable of interpreting the .csv file format.

The GL Query Builder is secured by User Group Permissions; a User may have access to design report queries but may not have the permissions to export or print the report results. The Security for this tool is designed to keep your data safe. System Administrators should think very carefully about possible repercussions prior to granting export and printing permissions to any User.

Once a report is completed and the User is satisfied with the report query design, it may be saved for future use if needed. Report query designs may be saved to a local hard drive or in a public folder on a file server. If other Users will be allowed to generate the report whenever needed, it will typically be saved on a file server in a folder to which the intended Users have access. Just keep in mind if another User is granted access to generate a report they are also able to modify the report query design. If the report query design needs to be preserved, a second Master copy of the report query should be saved in a secure location.

When designing a new report query, Users should determine what information is to be displayed on the report. It is helpful to layout on a sheet of paper what the desired results are for the finished report.

Below is a list of questions to consider when designing a report query.

- What is the intended use of the report? This will help in deciding which data fields will need to be included in the design of the report query.
- What information is needed on the report (which fields in which tables)?
- What specific pieces of information are required – only certain types of transactions etc.? This will help in creating filter selections for the report query.
- How is the report to be sorted? The GL Query Builder allows the User to select sorting options for how the report data will be listed.

Follow the Topic Links below for more information on the functionality and use of the GL Query Builder.

Understanding the GL Query Builder

Designing a Report Query

GL Query Builder Function Buttons

Fine Tuning Reports

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