Apps for Greentree

IMPORT EXPORT EXPLORER QUERIES

APP NUMBER: 010060

Powered by:

MYOB Greentree

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FEATURES

1. **Import and export Greentree Explorer queries.**

   Easily import and export single or multiple queries.

   Gain access to a class of data not currently published by Greentree.

   - Write and test explorer queries in the Test system then export and import into the Live system for use there,
   - Share a query with users of other systems.
   - Write queries and create simple extracts on a database table / class that is not currently published by Greentree in ODBC or FREE for Excel

IMPORTANT NOTES

   - We recommend that you test the configuration of the App thoroughly in a test system prior to deploying the App in your live Greentree system.
   - Use of this App documentation assumes knowledge of explorer and database classes

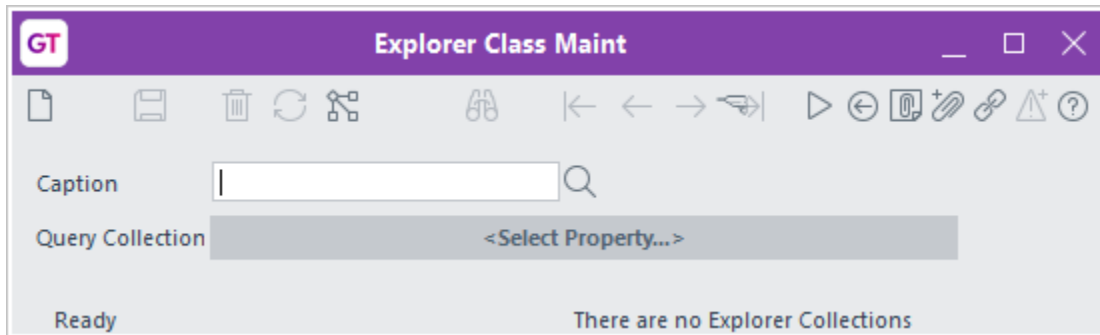## OTHER REQUIREMENTS

   Greentree Modules: Any.
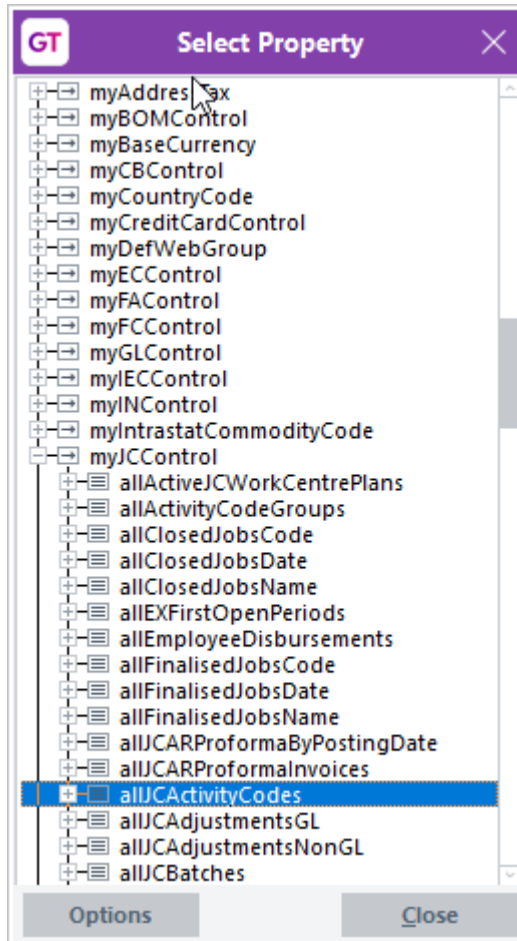
   Associated Apps: None.

EXPLORER CLASS MAINTENANCE

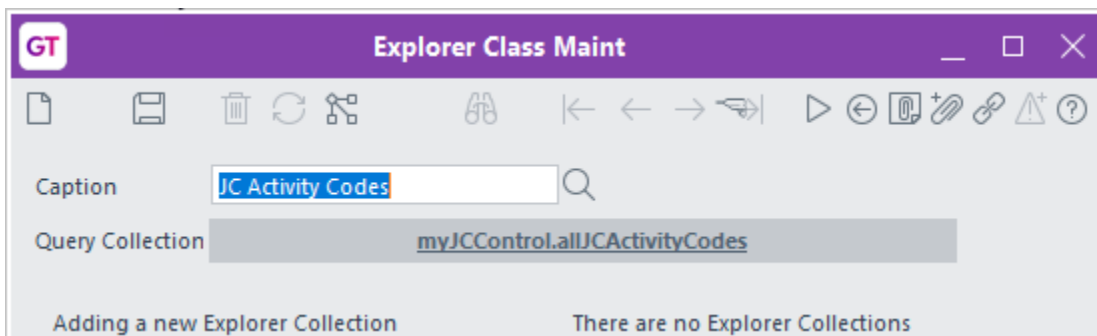Use this option to create custom classes where the data you require is not already published for use in Explorer.

1. Select the menu item | System | Utilities | Explorer Class Maintenance |

2. Click on the <Select Property...> button to select the class

3. Navigate to the class you require from the Select Property table. The majority of classes will be found by going to the relevant module control.
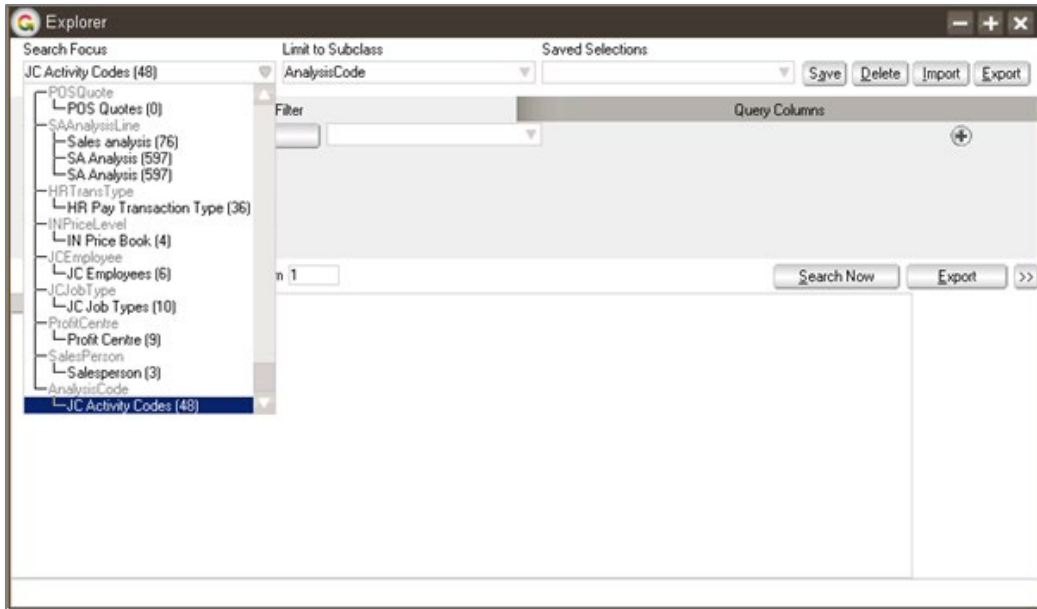
4. When you find the collection you are after, drag it back to the <Select Property…> button
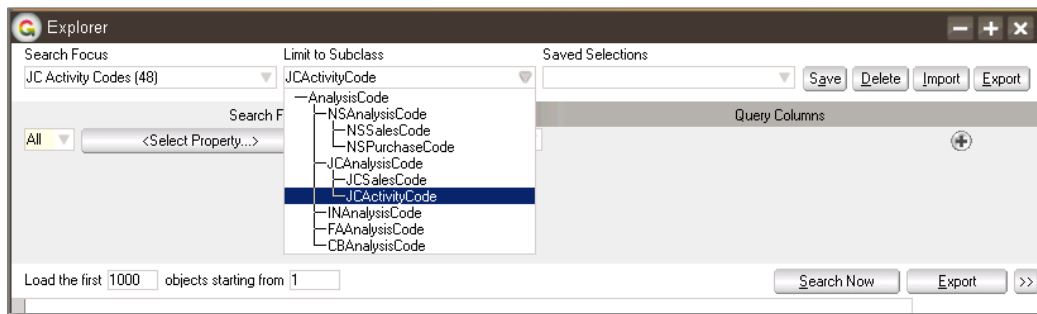5. Type the name you want to see in the explorer list into the Caption field.

6. Click Save
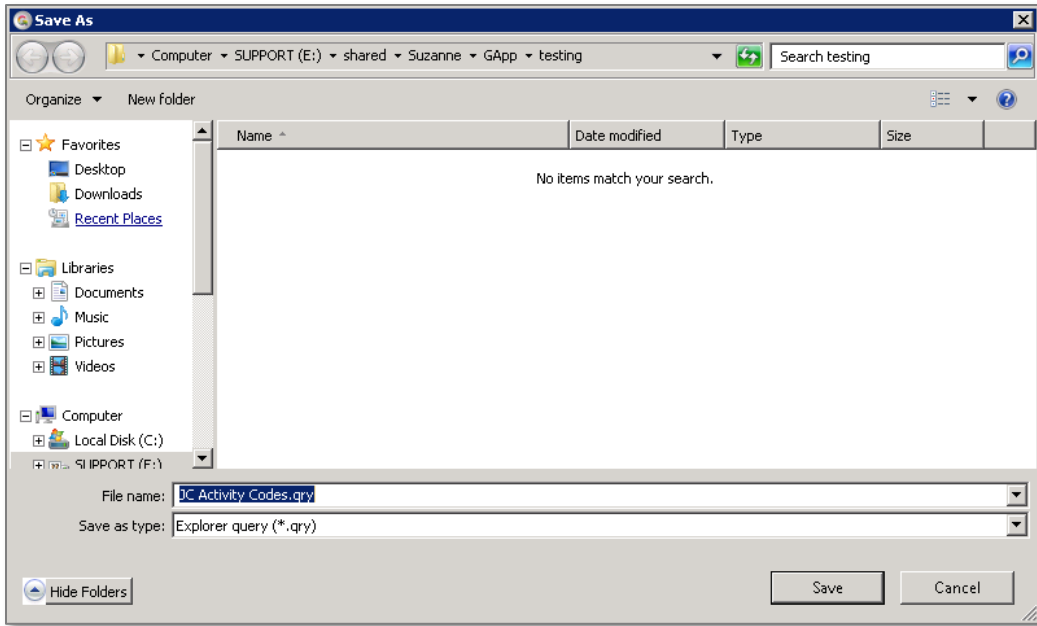7. Your new class can now be used within Explorer

EXPLORER QUERY EXPORT AND IMPORT

1. Select the menu item | File | Explorer |
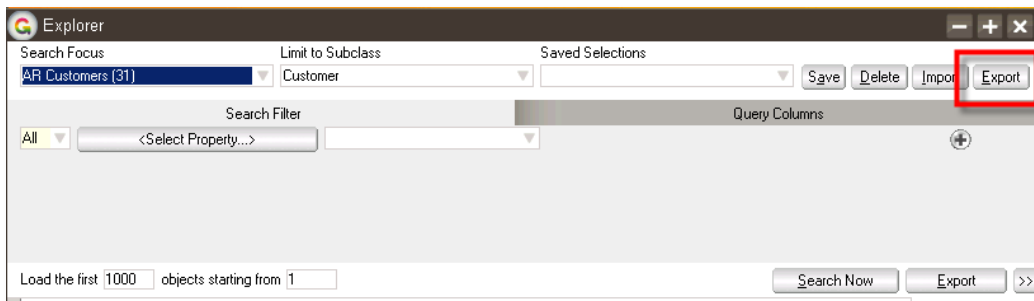2. If you created a custom class it will appear near the end of the list of classes in the Search Focus drop down

3. If your class has sub-classes, you will need to select the sub-class in the Limit to Subclass drop down.

4. Write your query and create a Saved Selection
5. To Export a single query, recall your Saved Selection
6. Click on the Export button
7. Navigate to the directory to export to then click Save.   It is advisable to make this an empty directory as if your query has a custom class then the class definition is exported as well – you need all of the files.
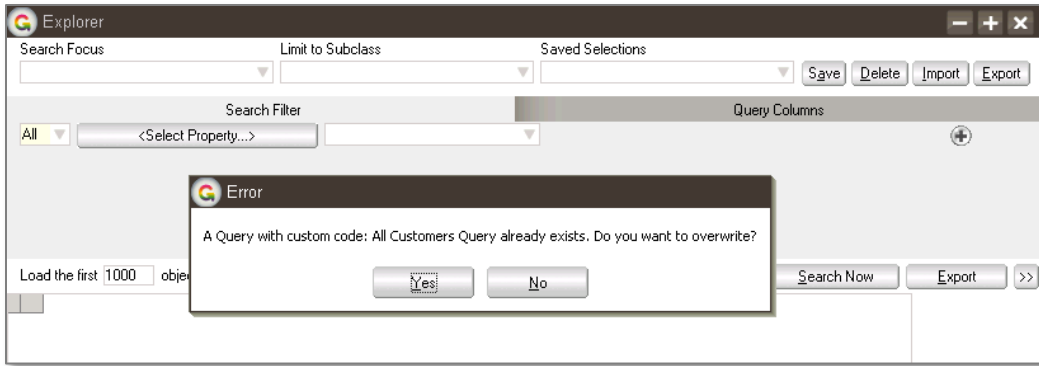
8. To export all queries for a particular class, select the class in the Search Focus and then click the Export button. You will only click save once but it will Export all queries for the class.

9. To export all queries in a system, leave the Search Focus blank and click the Export button.
10. To import queries, open explorer and click the Import button
11. To Import a single query click on it and click Open. To import multiple queries select them all by using Ctrl or Shift and selecting.

12. If any of the queries already exist you will be prompted whether you want to overwrite the existing Saved Selection
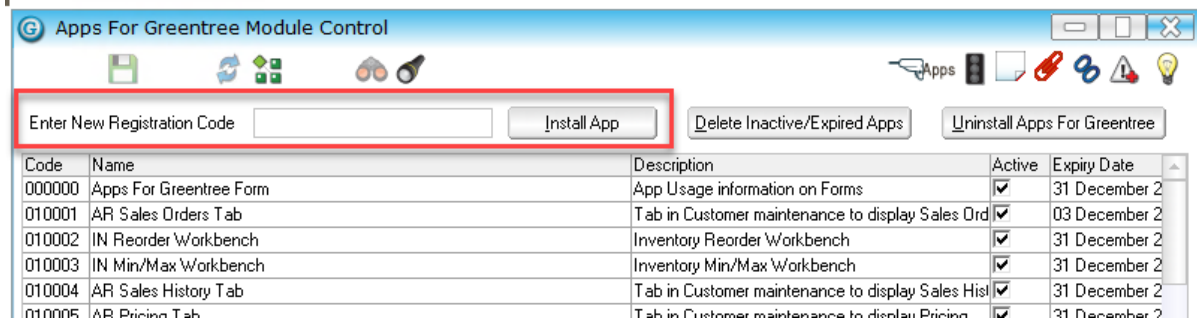
13. Click Yes to overwrite, or No to skip that query.
14. Saved Selections should then be in that system and able to be used.

IMPLEMENTATION GUIDE

Please refer to the Important Notes section above before installing and configuring this App

APP INSTALLATION

1. Log into Greentree as the Super user
2. Select the menu item | System | Apps For Greentree | Apps Module Control |
3. Enter the New Registration Codes supplied and click Install App

4. Select/Highlight the Import Export Explorer Queries App.
5. Click on the Edit Users button and select the users who will be configured to use Import Export Explorer Queries, for which companies.
6. Save and Close the form.