

Version 25



Trapeze

Enterprise Asset Management

Ad Hoc Query

Administrator Guide

Trade Secret | February 2025

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Technical Support

Trapeze provides several ways to connect with the Customer Care team. Please provide detailed information to the representative. If you are reporting an issue by e-mail, include any error messages, screen shots of your problem, and steps to replicate the issue.

Customer Care is available Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern Standard Time.

Toll-Free Telephone: 1-877-411-8727

E-mail: cc@trapezegroup.com

FTP Site: <https://ftps.trapezegroup.com/>

Web Site: <https://collaborate.trapezegroup.com>

The website provides access to Trapeze Collaborate which offers resources to implement and operate the software, search knowledge, participate in communities, log/track service requests, sign-up for release alerts, view product health recommendations, and download updates or documentation. For secure access to Collaborate, contact Customer Care through the website or by calling the number above.

Product Compatibility

Refer to the latest [Product Compatibility](#) information on Trapeze Collaborate for requirements including operating system information, databases, Crystal reports, network protocol, HTTP servers and browsers that are supported.

Ad Hoc Query - Administrator Guide

Version 25.x

February 2025

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1. Overview

The Ad Hoc Query module provides secure ad hoc query capabilities. It allows users to build their own queries, format the display of the results, export the results, and save queries for future use and sharing with others.

The Ad Hoc Query module uses screen views as data sources to provide end users with familiarity when querying data. Access to the views is restricted in this module through the same screen and control permissions used by the Enterprise Portal screens that limit a user's rights to viewing screens and fields.



Location and department security is not considered at this time by this tool.



To ensure users have access to reports, it is recommended to give user groups rights to the following screens that were setup to support ad hoc queries:

- 6001 User Profile
- 6002 Work Order Tasks
- 6003 Work Order Messages
- 6004 Work Order Notes
- 6005 Labor Postings
- 6006 Part Issues
- 6007 Commercial Postings
- 6008 Part Request Lines
- 6009 Fuel Tickets
- 6010 Usage Tickets

Requirements

Application 25.x

Web Modules 25.x

Assumptions

This guide assumes familiarity with the workflows and configuration of the application and with SQL statements.

-  User defined required fields that do not appear in the Web Modules will return validation messages.
-  Special characters cannot be placed into the Web Modules fields or unanticipated results may occur. This would include any character that cannot be typed with a standard keyboard.
-  Do not use the browser's **Back** button in the Web Modules as unanticipated results may occur.
-  Do not open or use the same instance of the web portals in multiple browser windows or tabs. This can cause errors or unexpected performance issues.

2. Install Ad Hoc Query Module

By default, all out of the box queries are shared to all users that have access to the underlying screens used in the queries. It is recommended that you review all the out of the box queries after any new install or update to ensure they meet your company needs.

Add Ad Hoc Query Tab to Web Modules

Once you have installed the Ad Hoc Query Module, you need to add a tab to Web Modules.

Additional Query Setup

Some queries may need additional setup. Use the following information to set up necessary supplementary information.

TERM Lite Inventory

Before the TERM Lite Inventory query can run, an administrator must run the **Ltermcodes.sql** script to create the base choice-list, equipment attributes, and equipment attribute groups used in the report.

This script can be found in the following location in your package:

- ...\\AppServer\\dbobjects\\all\\Ltermcodes.sql

3. Ad Hoc Query Module Overview

Administrator Information

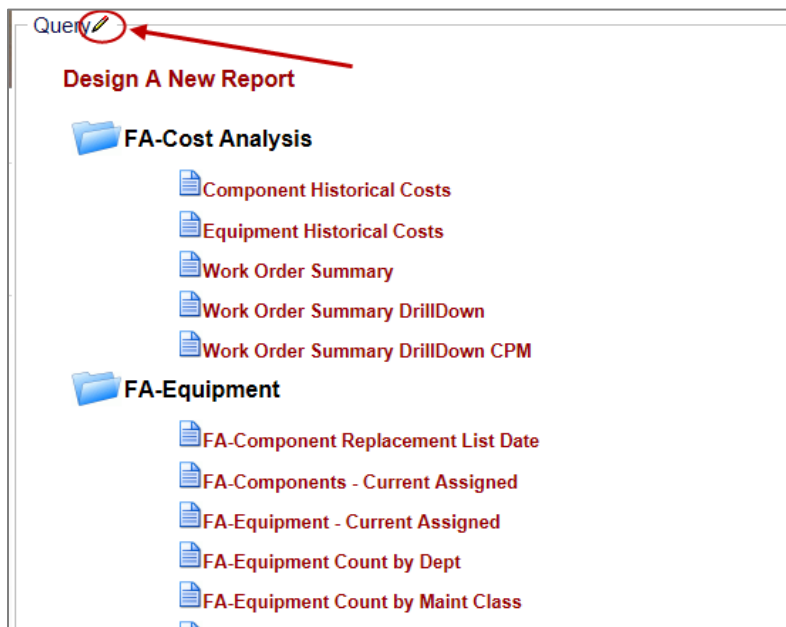
QueryViews.Dat info is stored in the database. When the Ad Hoc Query module first loads, it checks the database to see if there was a conversion. If there was a conversion, it pulls xml data from the database. If there was not a conversion, it renames the QueryViews.Dat to QueryViews.Dat_Converted then reads in the file to the database.

User interface (UI) was also developed that is accessible from the edit pencil icon in the Ad Hoc Query module. This UI allows administrators to easily grant access to users or groups to views or tables, and the edits update the database xml. As a result, administrators are able to easily delete or edit existing rights as explained in the section below.

On the Ad Hoc Query main page, an edit icon is visible for administrators next to the module title at the left, top of the page.

To edit the module:

1. Click the edit icon.



When you click the edit icon, a page displays like the one below.

Select a Table or View

Table Search:

Table Name
AA_MAIN
AA_NOTES
AAINV_AALIST
AAINV_CRITERIA
AAINV_MAIN
AAREQ_MAIN
AAREQ_NOTES
AASTAT_MAIN

View Search:

View Name
ACT_OK_ORDERS
BPO_VENDORS
CMP_COST_DATA_VIEW
CMP_TOP_EQ_CLASS
COLUMN_DICTIONARY
COMPLAINT_TASK_ID_CLIST
CRW_EMP_SKILLS
DIV_CLOSED

Or Enter a Custom Table or View

Table or View: **Next**

Current Special Permissions

Table or View	Users	Groups
AA_MAIN	AA.SRV	
AAINV_CRITERIA	AABUBEKER.SRV	COMPONENTS
ACT_OK_ORDERS	SRV	ALLOCATION AND ASSIGNMENT OPS
CRW_EMP_SKILLS	AAHMED.SRV	
EQ_CURRENT_ATTR	SRV	CONTROLLER - BUS
FUEL_TRANSACTIONS	SRV	ALLOCATION AND ASSIGNMENT OPS.SYS ADMIN
RPT_EQ_COSTS_WYTD	SRV	
RPT_OFFSET_FROM_MISMATCH	SYS ADMIN	

Cancel

- On this page, administrators may select an existing table or view from the database. If the table or view is not in either list, the administrator may manually enter a custom table or view and click the **Next** button.

Select a Table or View

Table Search:

Table Name
AA_MAIN
AA_NOTES
AAINV_AALIST
AAINV_CRITERIA
AAINV_MAIN
AAREQ_MAIN
AAREQ_NOTES
AASTAT_MAIN

View Search:

View Name
ACT_OK_ORDERS
BPO_VENDORS
CMP_COST_DATA_VIEW
CMP_TOP_EQ_CLASS
COLUMN_DICTIONARY
COMPLAINT_TASK_ID_CLIST
CRW_EMP_SKILLS
DIV_CLOSED

Or Enter a Custom Table or View

Table or View: **Next**

Current Special Permissions

Table or View	Users	Groups
AA_MAIN	AA.SRV	
AAINV_CRITERIA	AABUBEKER.SRV	COMPONENTS
ACT_OK_ORDERS	SRV	ALLOCATION AND ASSIGNMENT OPS
CRW_EMP_SKILLS	AAHMED.SRV	
EQ_CURRENT_ATTR	SRV	CONTROLLER - BUS
FUEL_TRANSACTIONS	SRV	ALLOCATION AND ASSIGNMENT OPS.SYS ADMIN
RPT_EQ_COSTS_WYTD	SRV	
RPT_OFFSET_FROM_MISMATCH	SYS ADMIN	

Cancel

After selecting a table or view, or clicking **Next**, the next section opens as shown in the screenshot below.

Table or View	Users	Groups	
ADJ_MAIN	KT		✗
RPT_EMPLOYEES	BS		✗
RPT_TERM_LITE_INV	MAXIMUS		✗
testtable	AABUBEKER	CNGROUP1, COMPONENTS	✗
UI_SCREEN	BS		✗
USR_MAIN	JK		✗

- On this page, administrators can select existing Users and or Groups and give them rights to the selected table or view. Click **Update File** to update or insert the access right data into the usr_profile table and re-start the session data so the newly updated users or groups have appropriate rights.

The new Current Special Permissions display in the bottom section of the page.

Current Special Permissions				
	Table or View	Users	Groups	
	ACC_MAIN	MOLLYT,AC	CNGROUP1,TECH	
	ADJ_MAIN	KT		
	RPT_EMPLOYEES	BS		
	RPT_TERM_LITE_INV	MAXIMUS		
	testtable	AABUBEKER	CNGROUP1,COMPONENTS	
	UI_SCREEN	BS		
	USR_MAIN	JK		

- Administrators can alter existing access rights by selecting one of the rows from the **Current Special Permissions** list. Selecting a row will bring the admin user to the second section of the page (as outlined above) and from there, the administrator can add or delete existing users or groups that have rights for that table or view.
- The admin user can also delete the existing row from the **Current Special Permissions** list by clicking on the delete button on the far right column of the list.

Current Special Permissions				
	Table or View	Users	Groups	
	ACC_MAIN	MOLLYT,AC	CNGROUP1,TECH	
	ADJ_MAIN	KT		
	RPT_EMPLOYEES	BS		
	RPT_TERM_LITE_INV	MAXIMUS		
	testtable	AABUBEKER	CNGROUP1,COMPONENTS	
	UI_SCREEN	BS		
	USR_MAIN	JK		

Select a row to update special permissions

Click the Delete (X) button to delete the row for the Current Special Permissions list

General Overview

This section is intended to only provide a brief, high-level overview of the Ad Hoc Query module. For specific procedure information, please refer to the *Ad Hoc Query Module User Guide*.

The Ad Hoc Query main page displays reports (in collapsed and expanded views) and allows you to design, edit, and delete reports.



Placing your cursor over a report and clicking the link, takes you to the report. The Delete  and Design  buttons also display when placing your cursor over a report as shown below.



 The screenshot below shows a categorized list (Vehicle Usage) of reports (Vehicle Last Meter). This example only shows one report.

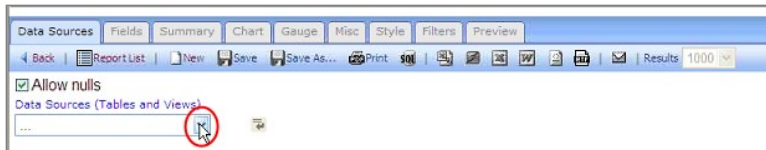


To design a report:

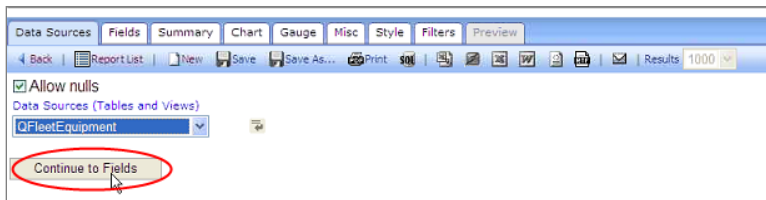
1. Click the **Design a New Report** link at the top of the page.

The Data Sources tab displays.

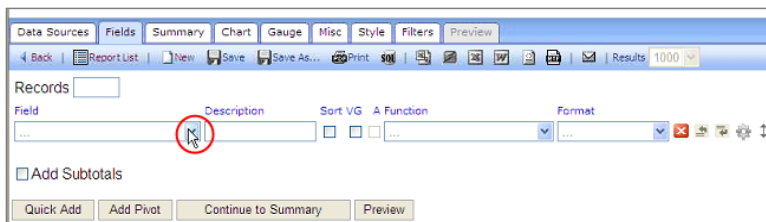
2. Select a **Data Source** from the dropdown list.



3. Click **Continue to Fields** to go to the next tab, the **Fields** tab.



The Fields tab displays.

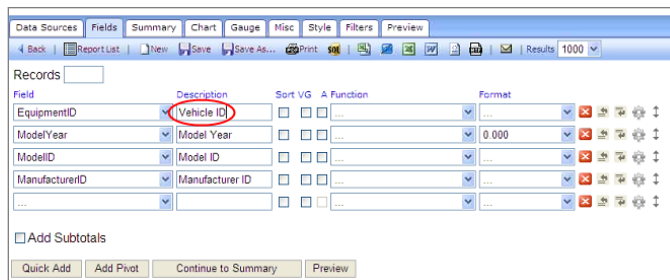
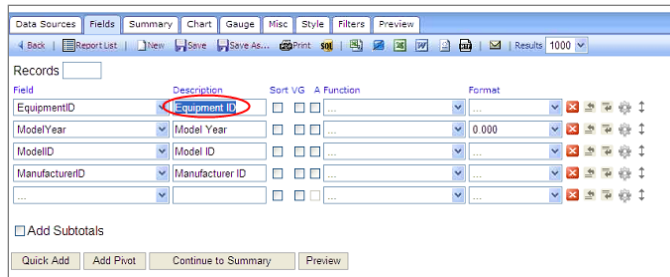


4. Select the fields from the dropdown list.

 **Note:** If screen controls and screen rights are in place to hide data, the dropdown list is minimized by the restrictions in place.

 You may use the keyboard when selecting items from the dropdown list to quicken the search for label names in the dropdown list.

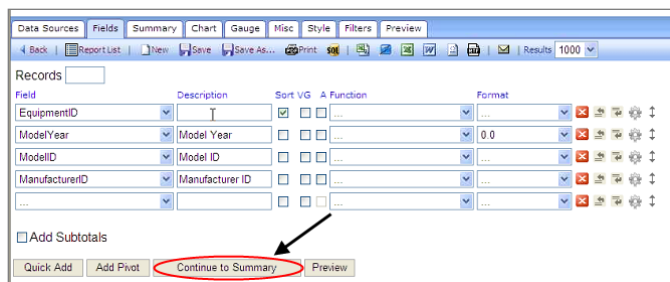
5. You may customize the **Description** name by entering a different name in the field. In the screenshots below, Equipment ID is changed to Vehicle ID.



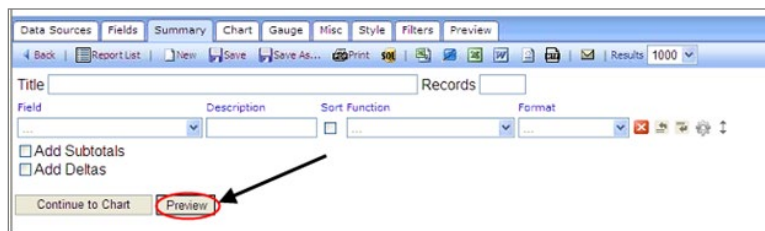
6. Other functions you may perform on this tab include the following:

- Sorting on the field (**Sort**)
- Grouping on the field (**VG**)
- Sort in ascending order (**A**)
- Sort by the count/group the field (**Function**)
- Choose the field format (**Format**).

7. Click the **Continue to Summary** button to continue to the next tab.



The Summary tab displays.



8. Complete the fields and click the **Continue to Chart** button to go to the **Chart** tab, or click the **Preview** button to see the simple report. The screenshot below shows the preview. If desired, select the results display by choosing from the dropdown list.

Vehicle ID	Model Year	Model ID	Manufacturer
EQ541	2000.0	EQ MAN1 MODEL 1	EQMANUF1
EQ4C	2000.0	EQ MAN4 MODEL 2	EQMANUF4
EQ4B	2000.0	EQ MAN4 MODEL 1	EQMANUF4
EQ4A	2000.0	EQ MAN4 MODEL 1	EQMANUF4
EQ3A	2000.0	EQ MAN3 MODEL 2	EQMANUF3
EQ3B	2000.0	EQ MAN3 MODEL 3	EQMANUF3
EQ2A	2000.0	EQ MAN2 MODEL 1	EQMANUF2
EQ1B	2000.0	EQ MAN1 MODEL 2	EQMANUF1
EQ541	2000.0	EQ MAN1 MODEL 1	EQMANUF1
EQ1A	2000.0	EQ MAN1 MODEL 1	EQMANUF1

9. Click on the column titles to sort. The direction of the arrow indicates the direction of the sort.

Vehicle ID ▲	Model Year	Model ID	Manufacturer
EQ541	2000.0	EQ MAN1 MODEL 1	EQMANUF1
EQ4C	2000.0	EQ MAN4 MODEL 2	EQMANUF4
EQ4B	2000.0	EQ MAN4 MODEL 1	EQMANUF4
EQ4A	2000.0	EQ MAN4 MODEL 1	EQMANUF4
EQ3A	2000.0	EQ MAN3 MODEL 2	EQMANUF3
EQ3B	2000.0	EQ MAN3 MODEL 3	EQMANUF3
EQ2A	2000.0	EQ MAN2 MODEL 1	EQMANUF2
EQ1B	2000.0	EQ MAN1 MODEL 2	EQMANUF1
EQ541	2000.0	EQ MAN1 MODEL 1	EQMANUF1
EQ1A	2000.0	EQ MAN1 MODEL 1	EQMANUF1

10. To save the report, click **Save As**.

Vehicle ID ▲	Model Year	Model ID ▲	Manufacturer
EQ4C	2000.0	EQ MAN4 MODEL 2	EQMANUF4
EQ4B	2000.0	EQ MAN4 MODEL 1	EQMANUF4
EQ4A	2000.0	EQ MAN4 MODEL 1	EQMANUF4
EQ3A	2000.0	EQ MAN3 MODEL 2	EQMANUF3
EQ3B	2000.0	EQ MAN3 MODEL 3	EQMANUF3
EQ2A	2000.0	EQ MAN2 MODEL 1	EQMANUF2
EQ1B	2000.0	EQ MAN1 MODEL 2	EQMANUF1
EQ541	2000.0	EQ MAN1 MODEL 1	EQMANUF1
EQ1A	2000.0	EQ MAN1 MODEL 1	EQMANUF1

11. Enter a report name and category and click the **OK** button.

Input report name
Equipment list

Category
Equipment

OK Cancel

12. On the **Miscellaneous** tab, complete the fields desired and click the **Continue to Style** button.

Title

Description

Header

Footer

Share With: Everyone Rights: None

Drill-Down Key

Continue to Style Preview

The **Style** tab displays as shown below. On this tab, you may change the style of your report.

FA-Equipment\TEST QUERY 1

DATA SOURCES FIELDS SUMMARY CHART CHART2 GAUGE MISC **STYLE** FILTERS PREVIEW

Report List | New | Save | Save As... | Print | SQL | | | | | | | | | | Results 100 ▼

Border color (Default) ▼ Header color (Default) ▼ Header foreground color (Default) ▼
 Item color (Default) ▼ Item foreground color (Default) ▼ Alternating item color (Default) ▼

Restore Default

Sample grid

Number	Letter
1	A
2	B

CSS:

☐ Landscape printing (PDF)
☐ Show page number
☐ Show date and time
☒ Use pagination
☐ Add bookmark for each visual group
☐ Page Break After Visual Groups (PDF)
☒ Minimize Grid Width
☐ All field headers bold
☐ All field headers italic
☐ Remove Headers for CSV Export
☒ Enable Responsive Grid

Visual Group Style

Comma Delimited ▼

Items Per Page (In Viewer)

10000 |

Report order

Chart ⬆ ⬇ ⬆

Gauges ⬆ ⬇ ⬆

Summary ⬆ ⬇ ⬆

Detail ⬆ ⬇ ⬆

Field\Value column pairs

2 ▼

☐ Show main report in Field | Value style
☐ Show summary report in Field | Value style

Continue to Filters Preview

13. Complete the fields as desired and click the **Continue to Filters** button.

The **Filters** tab displays.

14. Complete the fields and click the **Preview** button to preview the report.

The preview displays.

15. Click the **Save** to save the report.

16. Click the **SQL**  button to save SQL as text.

Assigned Type	Date Assign Start	Date Expected Return	Date Assign End	COND Condition Id
ASSET	12/18/2013		12/18/2013	
ASSET	12/18/2013			
ASSET	12/19/2013		12/24/2013	
ASSET	12/24/2013		1/7/2014	
ASSET	1/7/2014			
ASSET	1/29/2014		1/16/2017	
ASSET	3/20/2014			
ASSET	3/20/2014			
ASSET	3/20/2014		3/26/2014	
ASSET	6/24/2014			
ASSET	6/30/2014			

17. If you want to print to **pdf**, or export to Excel, Word, or email by select the appropriate icon.

Assigned Type	Date Assign Start	Date Expected Return	Date Assign End	COND Condition Id
ASSET	12/18/2013		12/18/2013	
ASSET	12/18/2013			
ASSET	12/19/2013		12/24/2013	
ASSET	12/24/2013		1/7/2014	
ASSET	1/7/2014			
ASSET	1/29/2014		1/16/2017	
ASSET	3/20/2014			
ASSET	3/20/2014			
ASSET	3/20/2014		3/26/2014	
ASSET	6/24/2014			
ASSET	6/30/2014			

Access Rights

Access rights to reports can be administrated in a variety of ways. Users may view the report under the following conditions.

1. They are the creator or owner of the report.
2. They are not the report creator, but it has been made available to everyone and they have access rights to the screens related to the QView data sources used in the report.
3. They are not the report creator, but it has been made available to everyone and they have been granted access rights to the database tables and views used in the report via the portal's module settings. Either their User or a User Group they belong to must have been granted rights to the database table or view.

These 3 conditions noted are always enforced and must be met for the user to view the report.

On top of these conditions, there is an extra layer of access rights that customers may opt into. When conditions 2 and 3 above are met, Administrators can specify what Users and User Groups may be allowed to view the report. This is beneficial when two types of users both have access to the same screen, but one of them should not be able to see the other's reports. For example, a supervisor may create a cross-team performance report that they do not want everyone with access to that screen to be able to view.

To opt into this level of access rights control, do the following:

1. Sign into web modules.
2. Go to the Admin Center.
3. Click on the **Options** hyperlink.
4. Turn on **Require access rights for all ad hoc reports**.
5. Click **Save**.

In order for Users to view reports they did not create, they will need to be granted explicit view-rights to the report.

To grant these rights, do the following:

1. Go to Admin Center > Options > "Ad Hoc Access Rights" or go to Query Portal > Module Settings > "Access Rights". These both will take you to the same page.
2. By default, **Reports** will be selected.
3. Select the report to assign access rights to in the dropdown list.

4. Optionally, set the **Default permissions for new records**. These will be the default values when you add Users or User Groups. Values can be changed later at any time.
5. Select User or User Groups to add for the report.
6. In the Permissions table, fine tune the permissions you want your Users/User Groups to have.
7. Click **Save**.

Permissions

There are three types of permissions that can be controlled for Users/User Groups:

1. **May View** - Allows the user to view the report. If the user/group does not exist in the Permissions table, the default assumption is that view-rights are denied.
2. **May Edit** - Allows the user to edit the report. They may alter any aspect about it.
3. **May Delete** - Allows the user to delete the report from the system.

4. Appendix – Ad Hoc Query Technical Tips

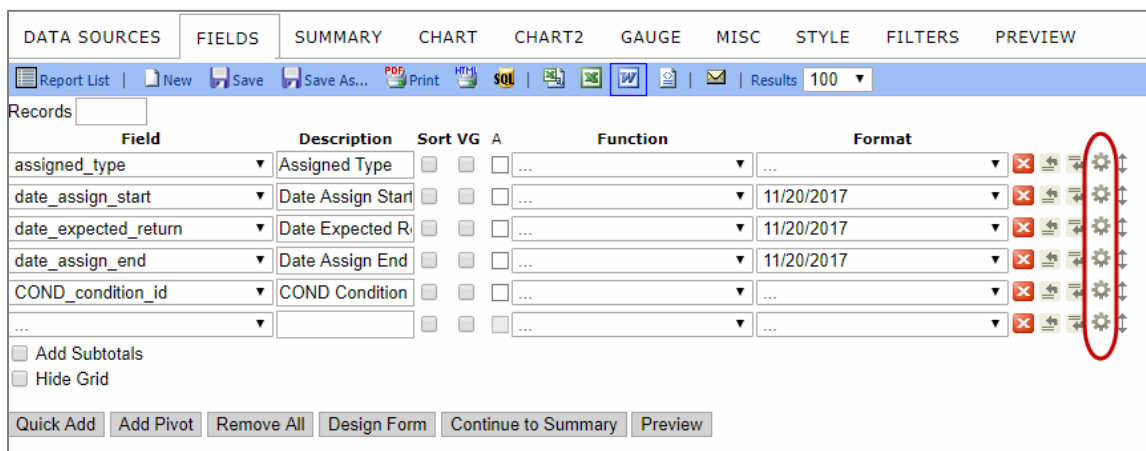
Launch an Enterprise Portal Screen and Filter on Record

Ad Hoc Query

Queries can be created to automatically launch an Enterprise Portal (EP) screen and filter on the selected record.

The following instructions outline how to set up Ad Hoc Queries so clicking on a row of data in an Ad Hoc query launches the related Enterprise Portal screen and filters on the record selected.

1. When editing or designing a report in the Ad Hoc Query module, open the Fields tab.
2. To link a specific field to EP, click the Advanced Field Settings Icon (gear icon).



The Advanced Properties pop-in displays.

3. In the **Url** field, paste the syntax as shown in the examples below depending on whether you want a single or multi filter.

Example 1: Single filter syntax (e.g., filter on the Equipment ID in the Fleet Equipment Screen): Paste the following syntax in the Open EP link:

“ onClick="javascript:var myWin = top.cash.openEPWindow('2024', '2024', '152:2={0}'); return false;" extra="

Example 2: Multi filter syntax (e.g., filter on the three part WO ID in the Work Order Center screen): The following is an example for opening WO Center sending in filter for WO ID where the columns are WO Loc, Year, and Number. Paste the following syntax in the Open EP link:

“ onClick="javascript:var myWin = top.cash.openEPWindow('2037', '2037', '188:2={0}^188:3={2}^188:4={3}'); return false;" extra="

Syntax string elements overview:

“ onClick="javascript:var myWin = top.cash.openEPWindow('{WindowName}', '{ScreenID}', '{FilterPairs}={{FieldValueToSend}}'); return false;" extra="

- **{WindowName}**: The IE window name, we use the screen ID as the name to avoid confusion

- **{ScreenID}**: The Screen ID you are trying to open
- **{FilterPairs}**: The filter fields in the form of WindowID:CtrlID=value, separated by ^ if more than one
- **{FieldValueToSend}**: The index of the field from the report for which you are sending data. 0 represents the current field, and 1 thru X represents column index from left to right.



Be careful to include all single quotes and double quotes exactly as shown the examples above. It is recommended to copy/paste the syntax.

Q View Access

There are many out-of-the-box Q views available. However, some require special permissions to be set for viewing as these Q views do not use the standard query permissions. If you do not see an out-of-the-box query, you may need to adjust the permissions for you or other users.

To see and use these views, you must set permissions for each user or user group in the Admin settings.

Dashboards

Dashboards can also be created so that clicking on a dashboard gauge launches an EP screen. The Dashboard process is similar to the Ad Hoc process, but without the variables. Instead, the filter data to send to EP is hard coded.

Follow the process as mentioned above but use the structure shown in the following example:

Dashboards syntax (with hard coding of **Location = PIT** and **Job Status = WORK FINISHED**):

```
"," onmousedown="javascript:var myWin = top.cash.openEPWindow('2037',  
'2037','188:2=PIT^188:8=WORK FINISHED'); return false;" extra="
```

Ad Hoc Query Report Exporting

Converting Query for Use in Other Platforms

When converting an Ad Hoc Query for use in the other database, remember that .xml files for Oracle (EMSDBA) must be in caps and the .xml files for MSSQL (emsdба) must be lower case. Therefore, in order to get one to work in the other platform, open the xml file and do a find and replace of all instances of [EMSDBA] with [emsdба] OR the other way around depending on which direction you are going.

Language Formatting for Exporting

When an English (United States) browser exports a report that has dates to CSV, the dates are exported in the English (United States) date format of month/day/year. When this CSV is loaded into excel, if the operating system language is English (Canada), then it will fail to parse the date fields as dates, and you will not be able to run date expressions on them.

- ✔ Ensure your browser language matches the host operating system language to avoid issues exporting the query.