EPM Query Introduction
HR 100

Description

Pre-Requisites: Access to Core-CT EPM and HRMS tables.

This training guide is designed for EPM users to get familiar with a basic understanding of the concepts of Query in Core-CT EPM.

This exercise focuses on the following topics:

1. Core-CT Reference Materials and Training Tools
2. EPM Reporting Tools and Navigation
3. Establishing criteria, editing query display, query creation, joining tables

Contents

Description 1

Exercise 1: Data Dictionary 4

- Using Search tools for Data Dictionary values 7
- Changing Page Display Functionality 8
- Other Search Options: To find Fields that contains a keyword 8

Exercise 2: Run an Existing Query 10

Exercise 3: Modifying an Existing Query 13

- To add reporting fields to the query report 14
- To remove a field from the query report 14
- To add criteria/prompt to a reporting Field from the Fields tab 15
- To add criteria to a reporting Field that is not displayed in the final report 17
- Review and Save 20
- Test Query 20

Exercise 4: Modifying an Existing Query 21

To add criteria/prompt to a reporting Field from the Fields tab 21
Reorder/Sort 22
Test Query 23
Exercise 5: Create a Positions Query 24
To add criteria to a reporting Field from the Fields tab 26
To add criteria/prompt to a reporting Field from the Fields tab 27
To add criteria/prompt to a reporting Field from the Fields tab 28
Review and Save 30
Test Query 30
To view historical information 30
Exercise 6: Create An Employee List Query 32
To add criteria to a reporting Field from the Fields tab 32
To Sort 33
Review and Save 33
Test Query 33
Exercise 7: Create A Benefits Billing Query 34
To add criteria to a reporting Field from the Fields tab 34
To add criteria/prompt to a reporting Field from the Fields tab 35
Review and Save 36
Test Query 36
Exercise 8: Create An Employee Query, Joining Tables 37
To add translate values/criteria to a reporting Field from the Fields tab 39
To add criteria/prompt to a reporting Field from the Fields tab 40
Review and Save 41
Test Query 41
Exercise 9: Create a Personal Data Audit Query, Joining Tables 42
To add criteria to a reporting Field from the Fields tab 44
To add criteria/prompt to a reporting Field from the Fields tab 44
To add criteria/prompt to a reporting Field from the Fields tab 46
Review and Save 48
Test Query 48
Exercise 10: Create a Position Query, Joining Tables 49
To add criteria/prompt to a reporting Field from the Fields tab 51

Review and Save 51
Test Query 52
Exercise 11: Query Maintenance 53
To rename a query 53
To delete a private query 53
To copy a private query to another user 54
To use folders and favorites 54

Exercise 1: Data Dictionary

Navigation: Main Menu > Core-CT EPM > Reporting Tools > Data Dictionary

Skills: Locating information using the Data Dictionary

Reference: EPM Data Dictionary

The purpose of this exercise is to acquaint a user with the EPM Data Dictionary, an online reference tool. The EPM Data Dictionary contains the fields, associated reporting tables and field definitions for all reporting tables in the Enterprise Performance Management (EPM) data warehouse.

1). Data Dictionary offers three search fields.

<u>Reporting Table Name:</u> Utilize this search field when you know the name of the Reporting Table and you would like to know more information specific to the table. *Remember all Reporting Tables begin with CTW_.

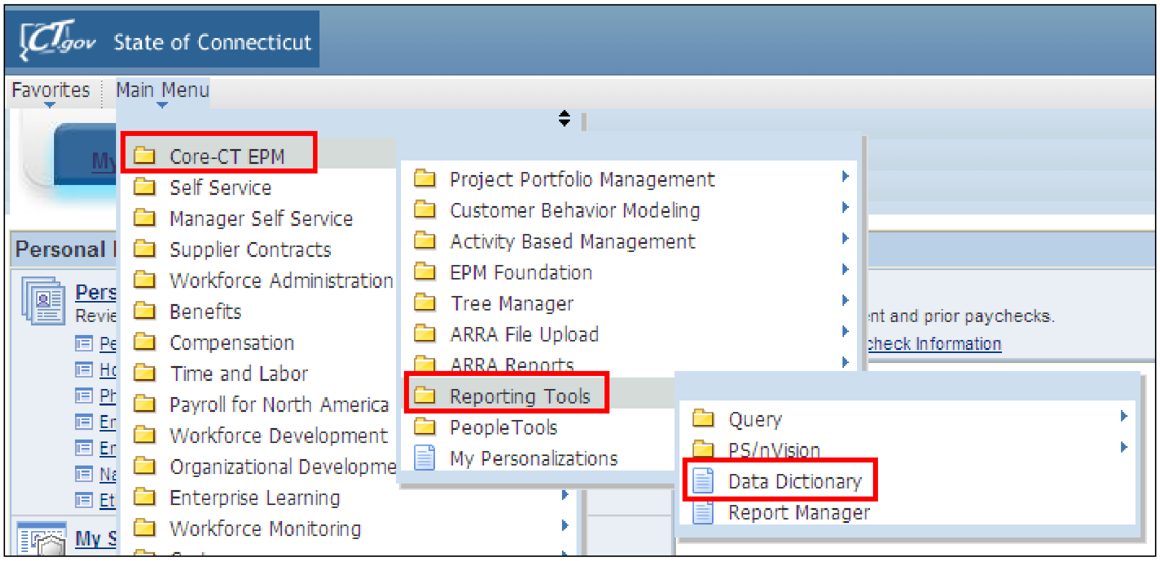
<u>Reporting Table Field Name:</u> Utilize this search field when you know the name of the Reporting Field and you would like to know which Reporting Tables utilize this field. *Remember, the name of a Reporting Field utilizes a CORE CT naming convention.

<u>Reporting Field Label Name:</u> Utilize this search field when you don't know the name of the Reporting Field but rather know commonly used words that may be associated with one or more Reporting Fields.

2). Users can choose from a list of logical search parameters for each search field. The most commonly used logical search parameters are "begins with" and "contains."

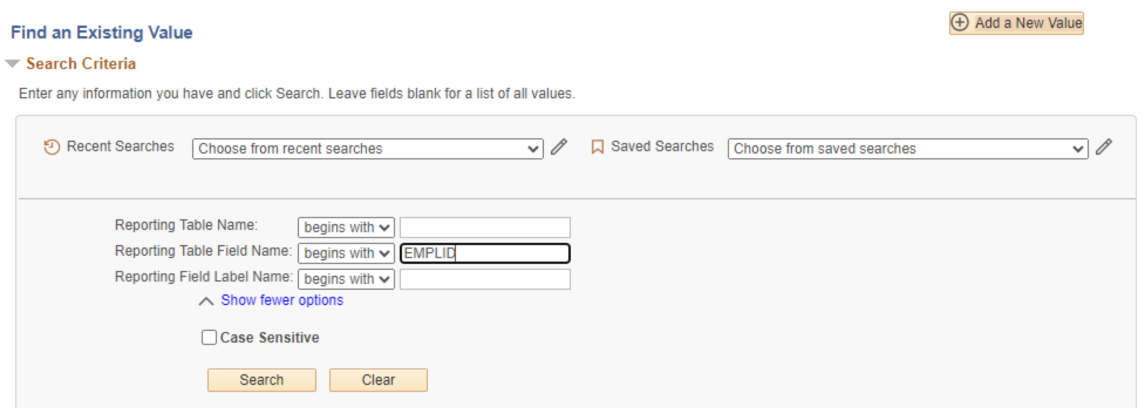
3). Users can access a short definition/description and translate values, if any, for any search value returned simply by selecting the value's link.

Scenario: Find all tables containing the fields: Employee Id, Employee Class, Department ID and Salary.



1. Enter **EPMLID** into search field labeled <u>Reporting Table Field Name</u>

2. Select **Search**

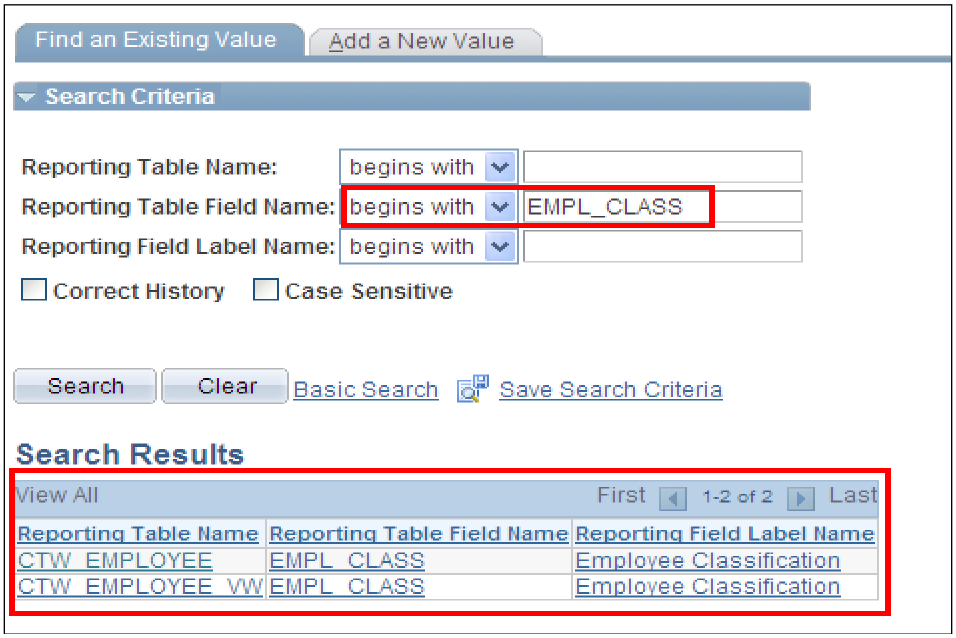


Results: Listing of all tables containing the field EMPLID appears

3. Clear the results by selecting the **Clear** button and return to **Search**

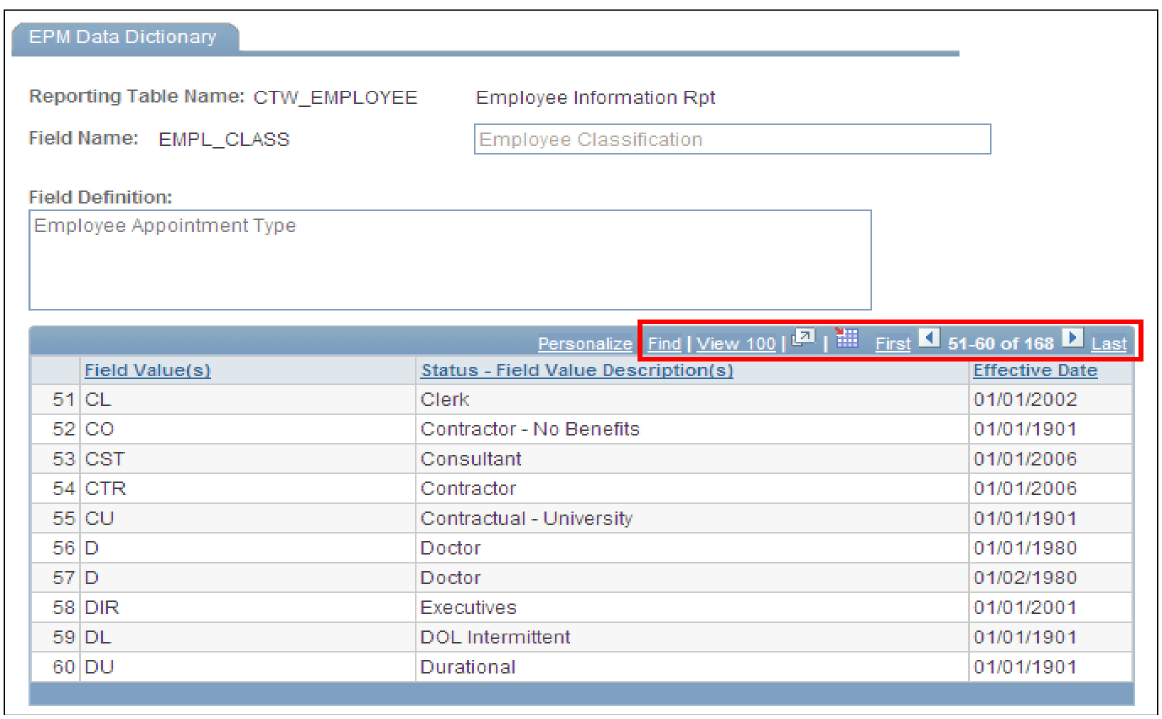
4. Enter **EMPL_CLASS** into search field labeled <u>Reporting Table Field Name</u>

5. Select **Search**



Results: Listing of all tables containing the field EMPL_CLASS appears

6. Select **Employee Classification** link under the table heading <u>Reporting Field Label Name</u>



Results: Listing of all Employee Class values appears

7. Select **Return to Search** button located at the bottom left of the screen

8. Select the **Clear** button to clear search criterion

9. Enter **DEPTID** into search field labeled <u>Reporting Table Field Name</u>

10. Select **Search**

Results: Listing of all tables containing the field DEPTID appears

11. Select **Department** link under the table heading <u>Reporting Field Label Name</u>

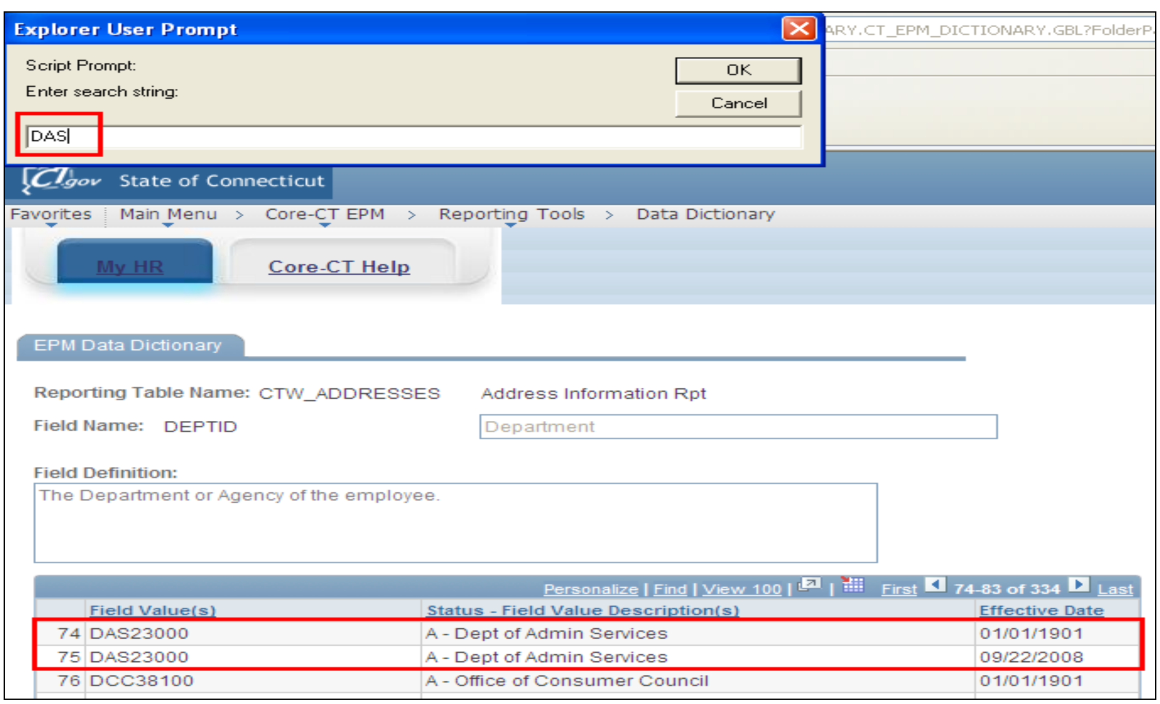
Results: Listing of all Department ID's appears. Note: Be mindful of the Reporting Table selected—DEPTID Financials has different values than DEPTID HR

Using Search tools for Data Dictionary values

12. Select the **Find** link on the **Field Value Header Tool** bar located in the search return table.

13. Type in the first three letters of your agency. *The Find functionality works similar to Excel and will display requested values

14. Select **Ok**



Changing Page Display Functionality

15. Select **View 100** link on the **Field Value Header Tool** bar to view 100 values at a time.

Other Search Options: To find Fields that contains a keyword

16. Select **Return to Search** button located at the bottom left of the screen

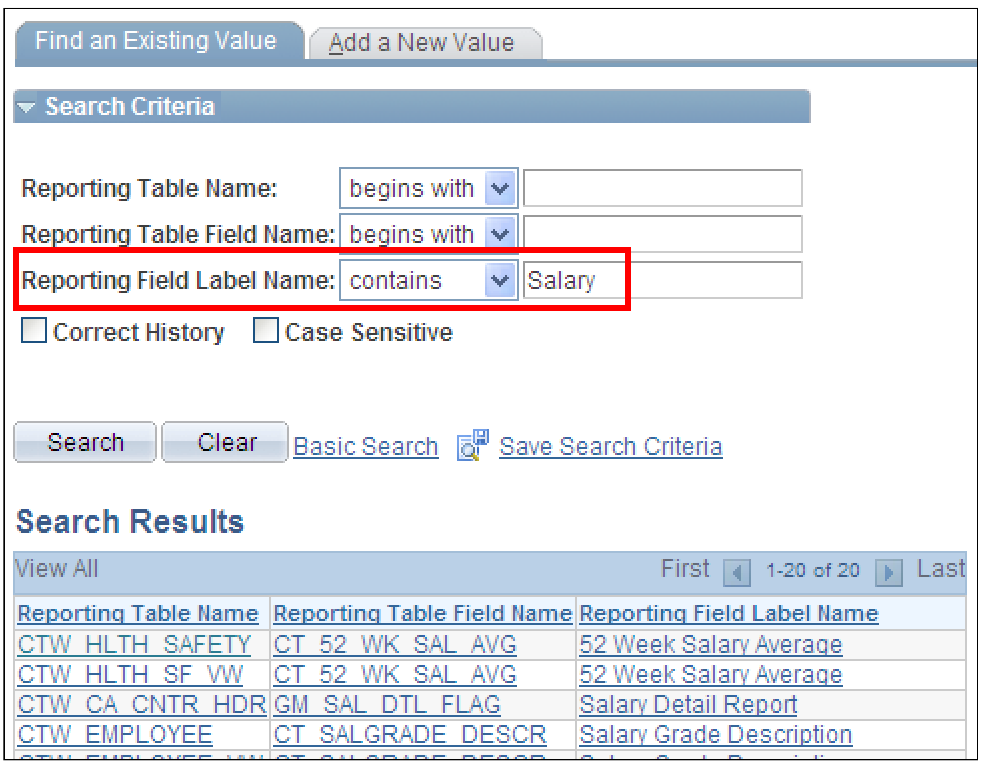
17. Select the **Clear** button to clear search criterion

18. Select drop down arrow to access condition type options for the search field labeled Reporting Field Label Name

19. Select **contains** option

20. Enter **Salary** into the search field labeled Reporting Field Label Name

21. Select **Search**



Results: All fields containing the word salary are displayed. By using the condition type of contains and being as specific as possible with your choice of words, you can search for data without knowing the People Soft name of the field.

Exercise 2: Run an Existing Query

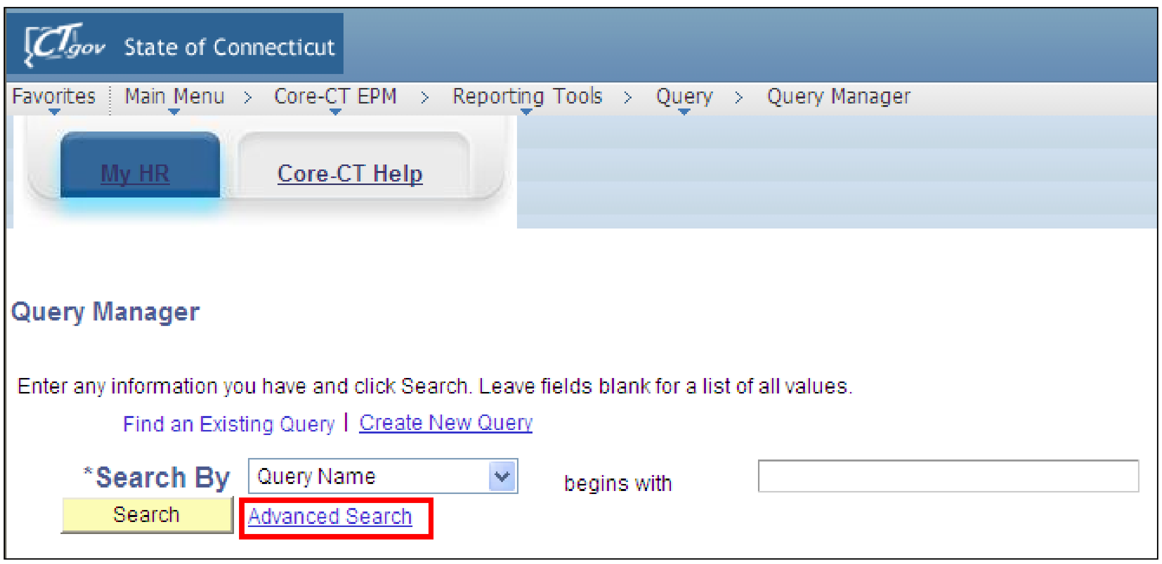
Scenario: Run a report identifying all active employees and active positions for your department.

Skills: Finding and Running an existing Query

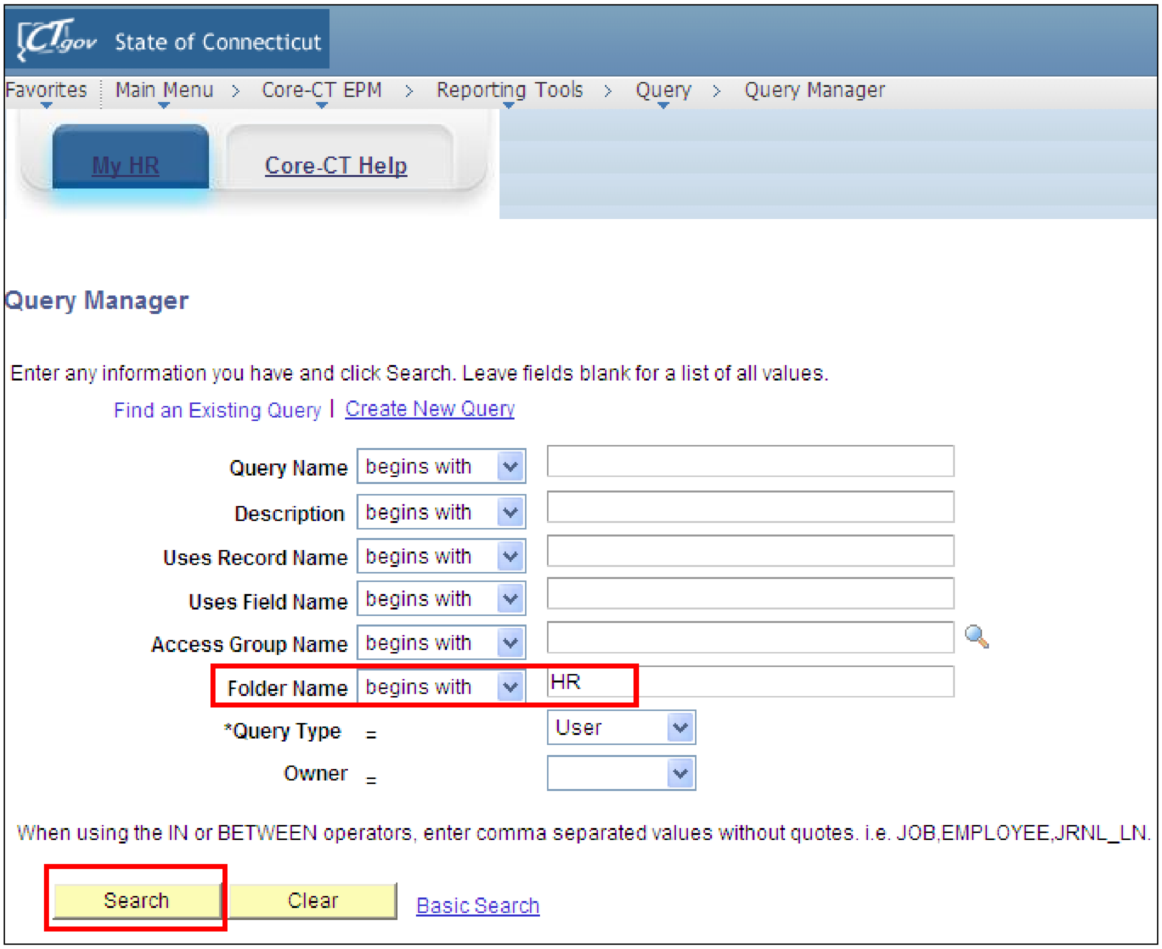
Reference: Catalog of Online Financial Reports and EPM Queries

Navigation: Main Menu > Core-CT EPM > Reporting Tools > Query > Query Manager

1. Select the Advanced Search tab



2. Enter HR in the search field labeled, **Folder Name**



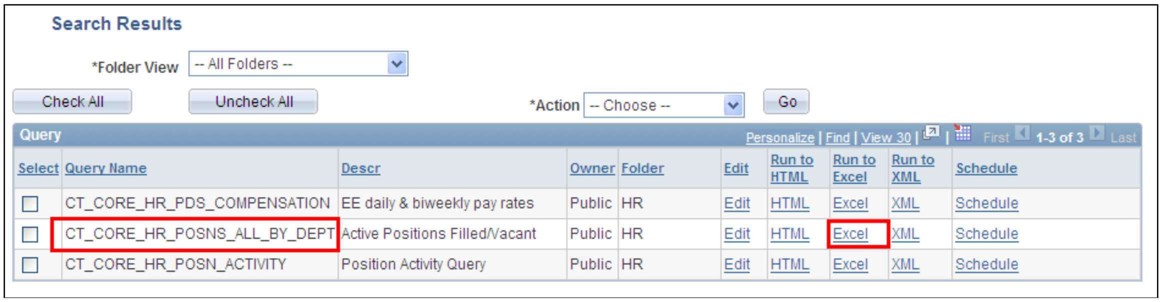
3. Select **Search**

Results: Listing of all queries in the HR folder appears

4. Within the results displayed, locate the Query titled, CT_CORE_HR_POSNS_ALL_BY_DEPT

5. Under the <u>Run to Excel</u> option, select **Excel**

Results: Run time prompts appear

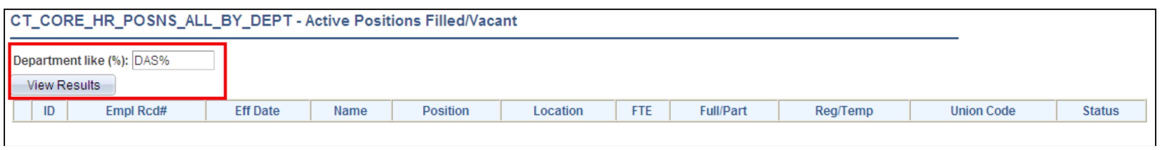


6. To execute this query, locate run time prompt titled, DEPTID like (%) in the upper left hand corner

7. Enter **the first three letters of your agency's DEPT ID %**

8. Select **View Results**

Results: The query will run to completion and display on the screen. Note: the number of rows returned.



Exercise 3: Modifying an Existing Query

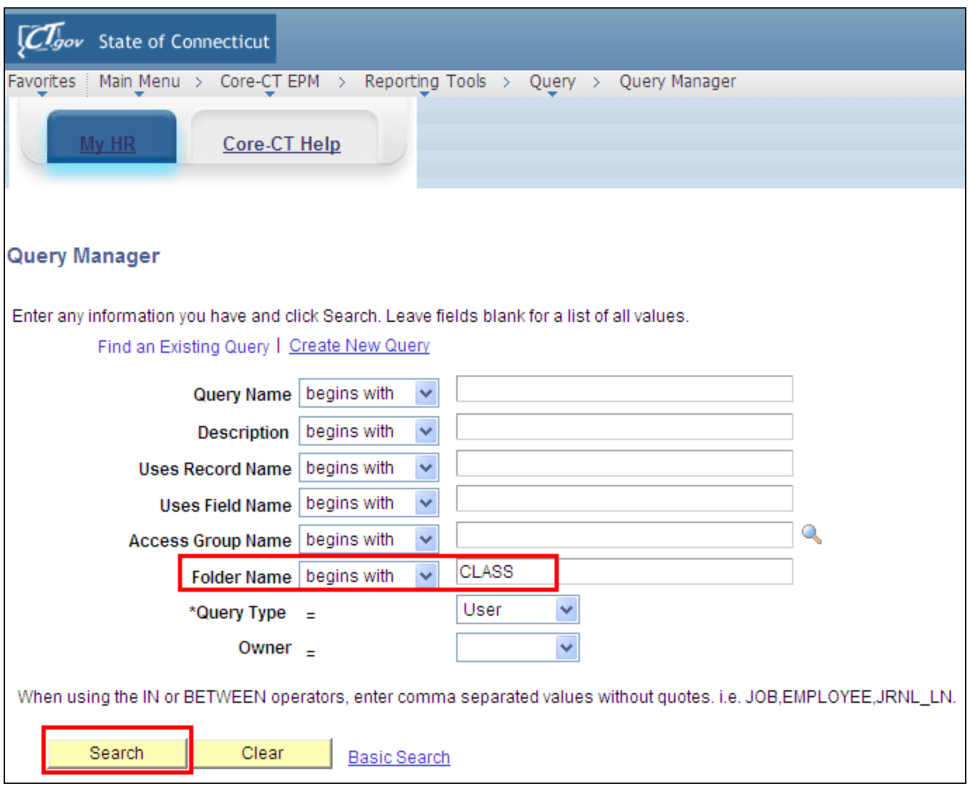
Skills: Learn how to modify an existing query, add prompt criteria.

Navigation: Main Menu > Core-CT EPM > Reporting Tools > Query > Query Manager

Scenario: Modify the query, CT_CLASS_HR_JOBCODE to include a prompt for DEPTID to provide a list of all active employees and their job codes in a specified agency.

1. Select the Advanced Search tab

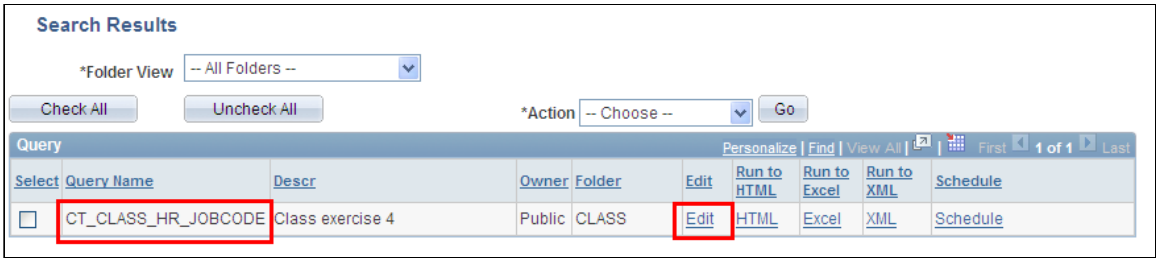
2. Enter **CLASS** in the search field labeled, **Folder Name**



Results: Listing of all queries in the **CLASS** folder appears

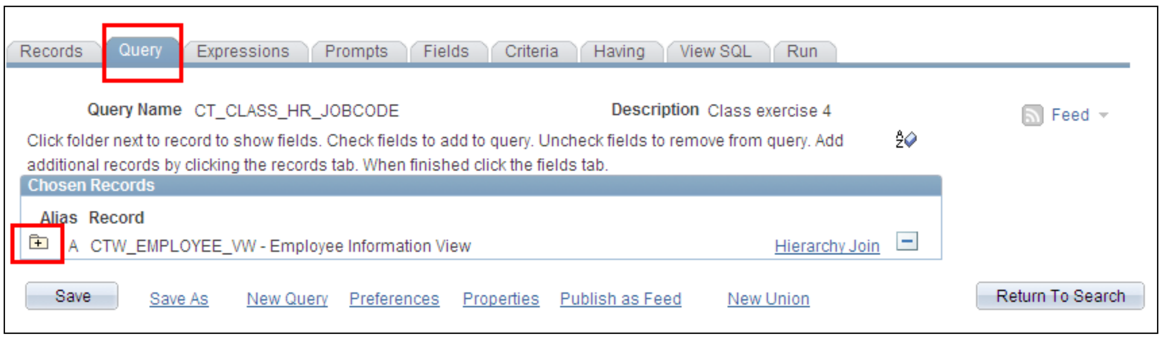
3. Within the results displayed, locate the Query titled, **CT_CLASS_HR_JOBCODE**

4. Select the **Edit** hyperlink located to the right of the name of the report



5. Select the **Query** tab

6. Locate the expand option denoted by a plus sign (+) on a folder to the left of a record titled, CTW_EMPLOYEE_VW



Results: CTW_EMPLOYEE_VW record is the table used to build the query. All the fields contained in this record/table are displayed. All checked fields will display on the final report.

To add reporting fields to the query report

7. Locate the Fields titled, **LOCATION** and **CT_LOCATION_DESCR**

8. Check the box next to the Field names

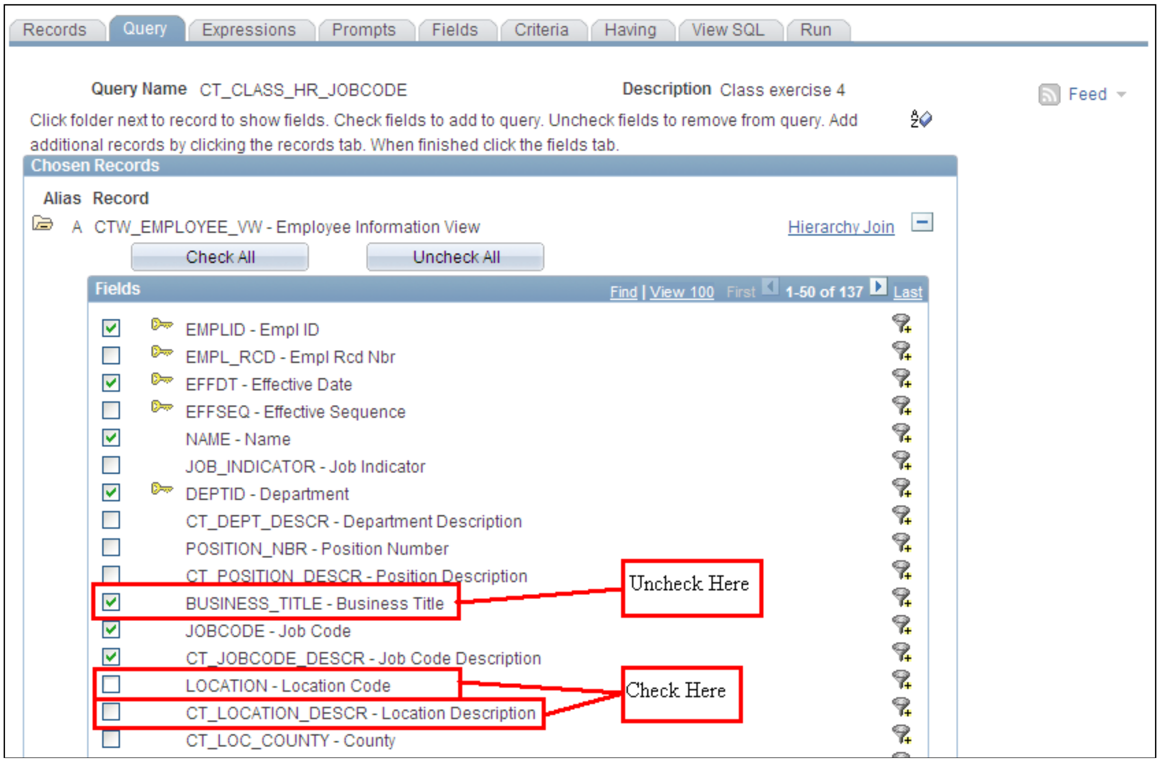
Results: The Fields, **LOCATION** and **CT_LOCATION_DESCR** will now display on the final report

To remove a field from the query report

9. Locate the Field titled, **BUSINESS_TITLE**

10. Uncheck the box next to the Field name

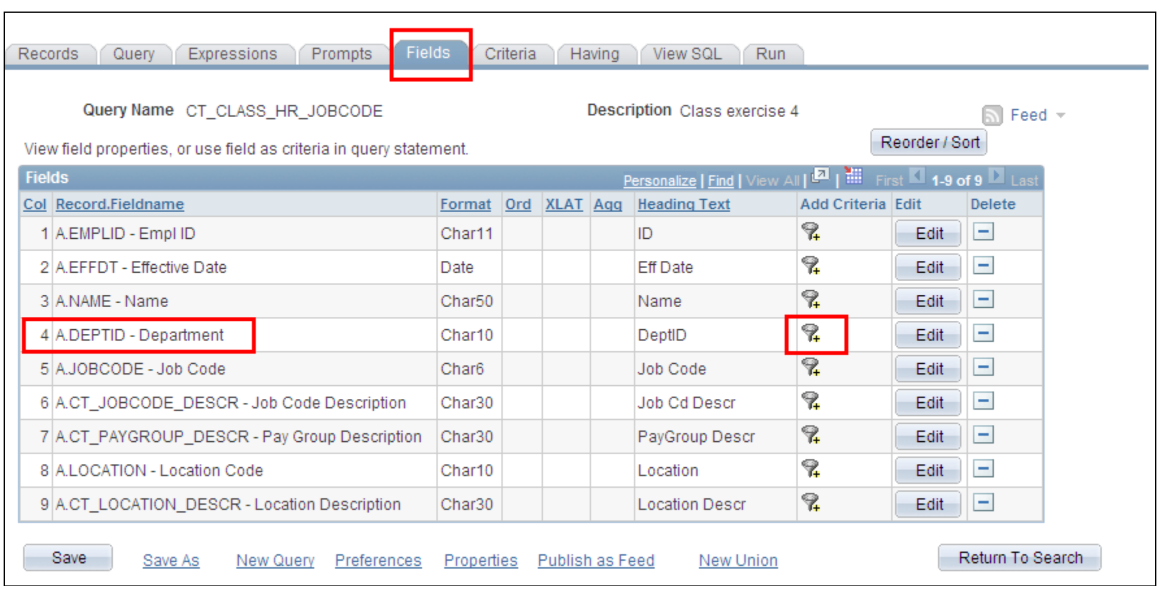
Results: The Field, **BUSINESS_TITLE**, will not display on the final report



To add criteria/prompt to a reporting Field from the Fields tab

11. Locate the Field titled, **DEPTID,** on the Fields tab

12. Select the Add Criteria icon represented by the picture of a funnel located to the right of the Field name, **DEPTID**

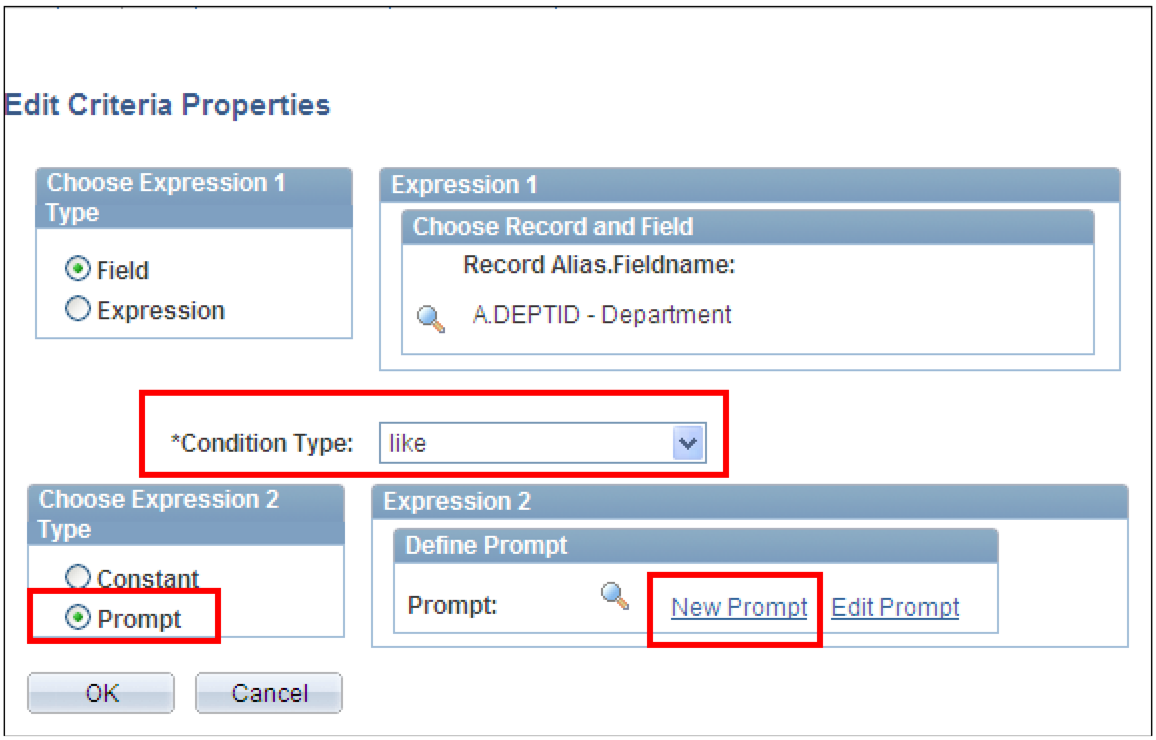


Results: The Edit Criteria Properties page appears for the Field, **DEPTID**

13. Select **like** as a condition type from the drop down menu

14. Within the Choose Expression 2 Type, select the **prompt** radio button

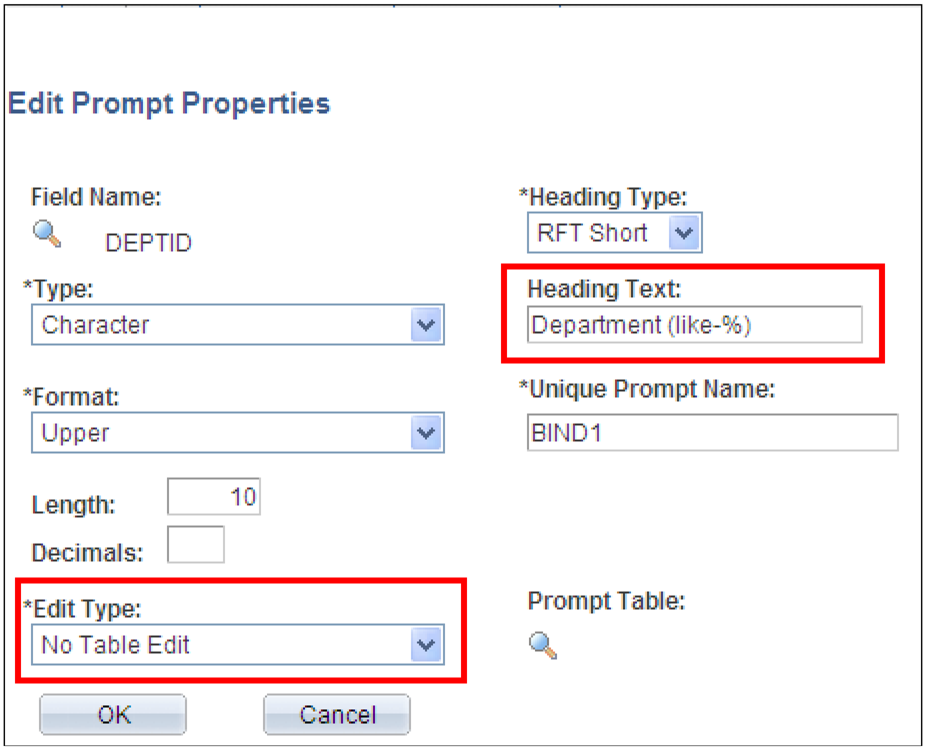
15. Within the Expression 2 box, select the **New Prompt** link



Results: The Edit Prompt Properties page appears

16. Locate the Heading Text field and enter **Department (like-%)**

17. Select **Ok**



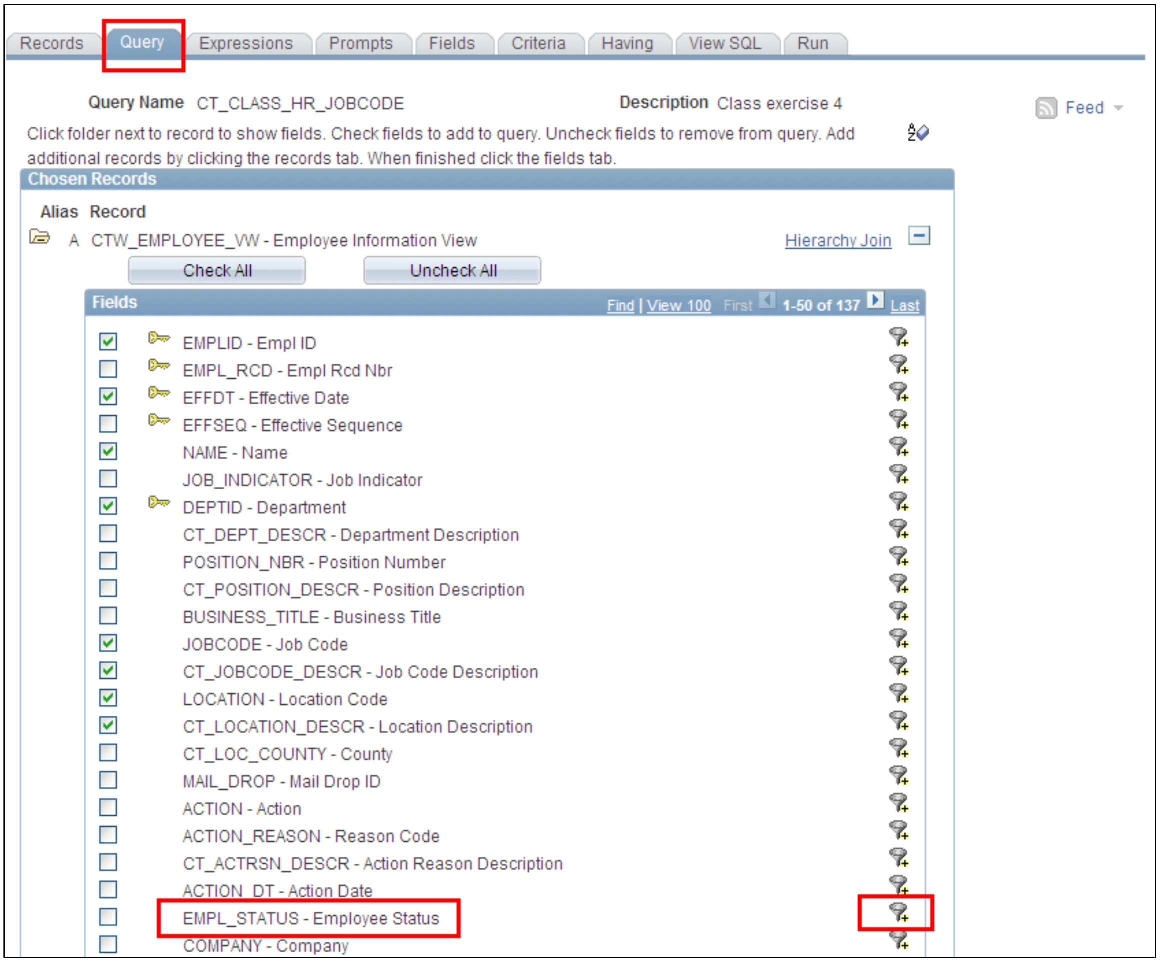
To add criteria to a reporting Field that is not displayed in the final report

To add criteria to a reporting Field that is not displayed in the final report, you must add criteria from either the Query or Criteria tab.

18. Select the Query Tab and locate the Field titled, **EMPL_STATUS**

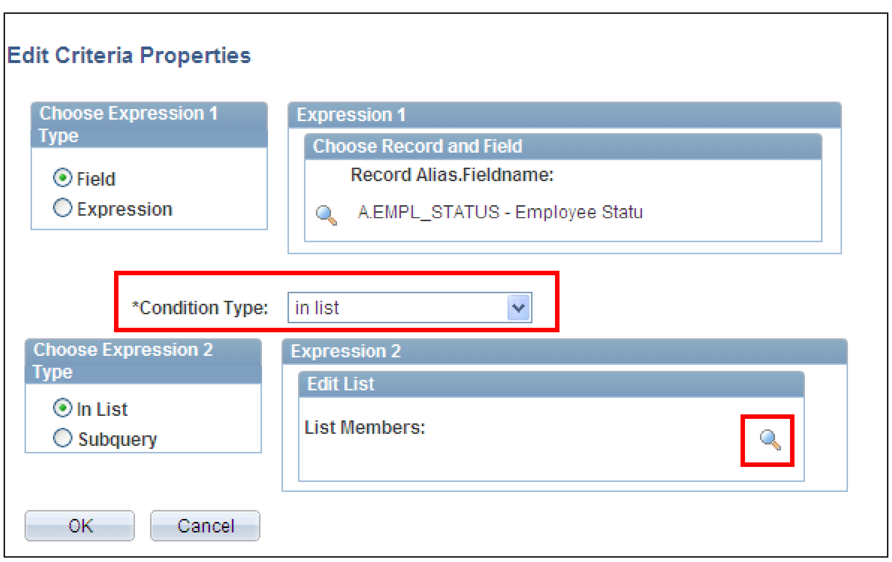
19. Select the Add Criteria icon represented by the picture of a funnel located to the right of the Field name, **EMPL_STATUS**

Results: The Edit Criteria Properties page appears for the Field, **EMPL_STATUS**



20. Select **in list** as a condition type from the drop down menu

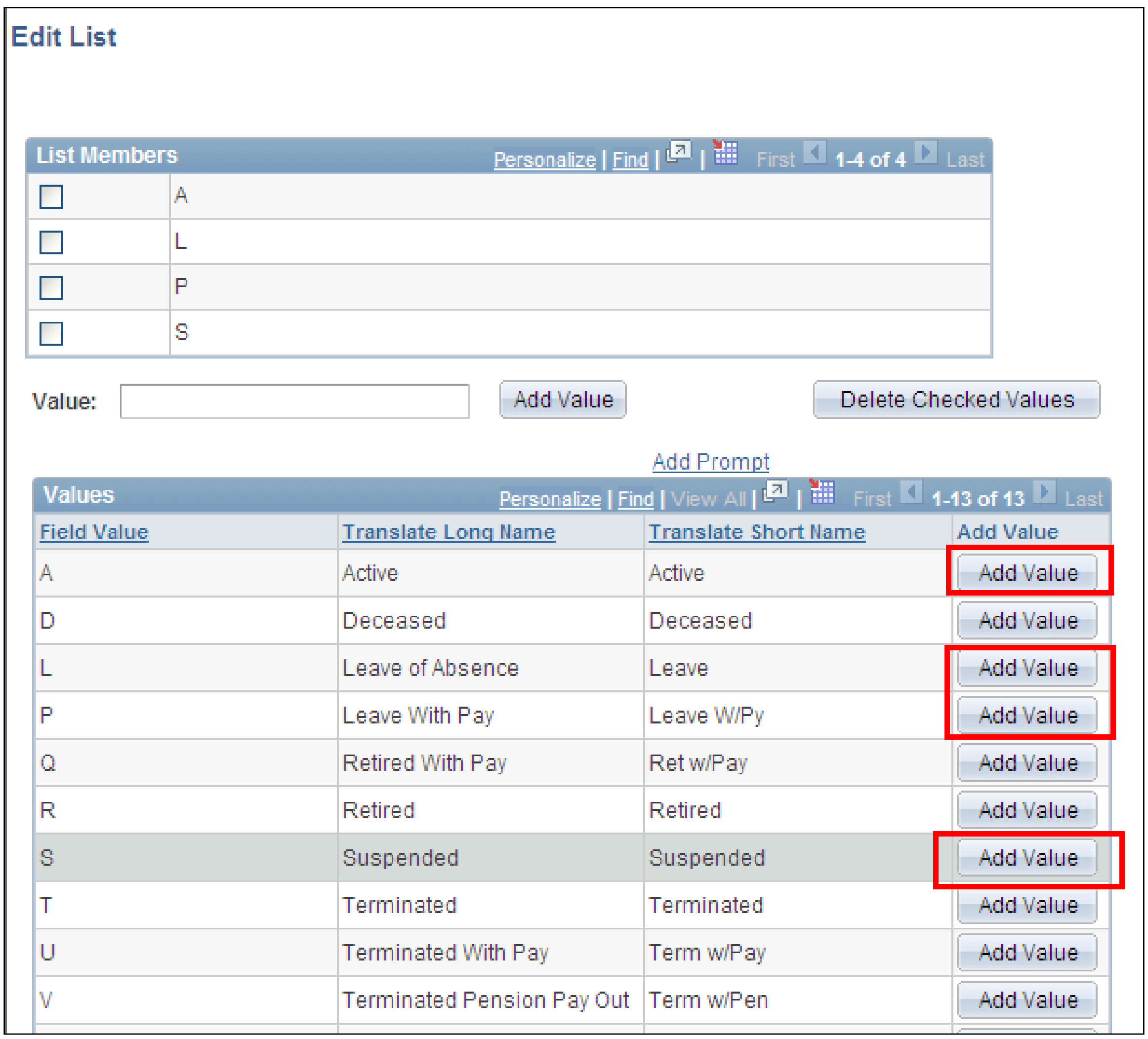
21. Select the looking glass icon located within the Expression 2>Edit List to display the predetermined values for this field



22. Select the **Add Value** key for each of the following values: A - Active, L - Leave, P - Leave w/Py, and S - Suspended

23. After selecting, click Add Value for each value. Select **OK** after validating the list of members on the Edit Criteria Properties page.

Results: You have established selection criteria for the Field, **EMPL_STATUS** without the field displaying on the final report. **PLEASE NOTE: If you are required to enter alpha values, make sure these are capitalized.**



Review and Save

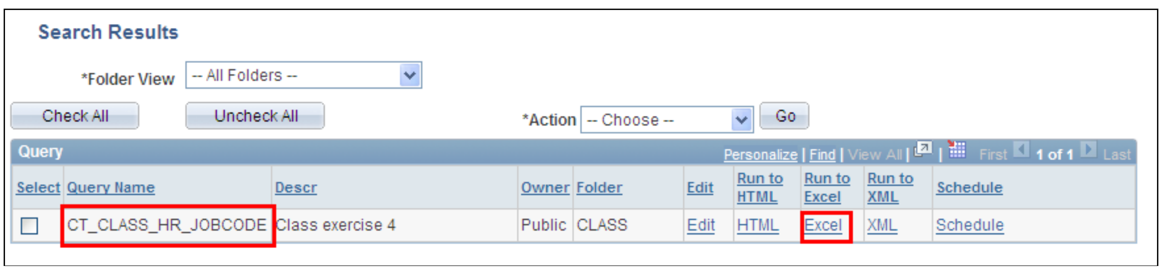
24. Select **Save As** located in the row of links at the bottom of the query page to save your query.

25. Name your query using standard naming conventions, description as well as identify a folder to save in, if appropriate.

Test Query

26. Return to Search and enter the new query name in the search engine. Select **Run to Excel** located to the right of your saved query name on the Query Manager page. When prompted, enter the first three letters of your agency's DEPTID followed by the percent sign (%) as well as enter a Union Code. Note: a list of Union Codes is available in data dictionary.

Results: An Excel spreadsheet will generate and display the results of your query. If appropriate, save to a location of your choice and evaluate the data.



Exercise 4: Modifying an Existing Query

Scenario: You have been asked to modify the query you just created in Exercise three to include a prompt for Union Code as well as to reorder and sort the data fields in the final report.

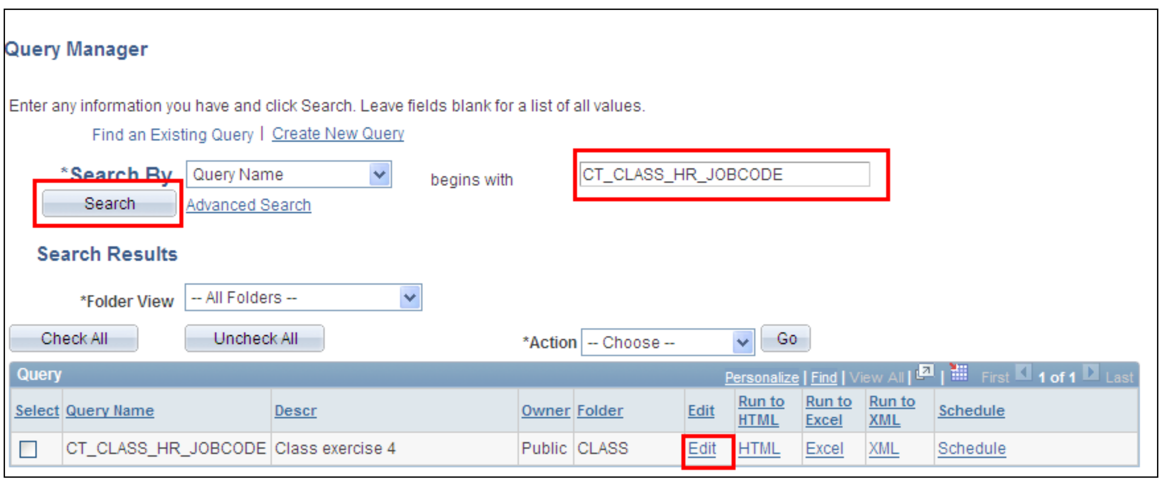
Skills: Modifying an Existing Query, prompts, sort order

Navigation: Main Menu > Core-CT EPM > Reporting Tools > Query > Query Manager

1. Enter the query name established in Exercise Three

2. Select the **Edit** hyperlink located to the right of the name of the report

Results: The query will open to the Fields tab and a listing of the fields being utilized will appear



3. On the **Query** tab, select UNION_CD to add the Union Code field to the report

To add criteria/prompt to a reporting Field from the Fields tab

4. Locate the Field titled, **UNION_CD,** on the Fields tab

5. Select the Add Criteria icon represented by the picture of a funnel located to the right of the Field name, **UNION_CD**

Results: The Edit Criteria Properties page appears for the Field, **UNION_CD**

6. Select **Equal To** as a condition type from the drop down menu

7. Within the Choose Expression 2 Type, select the **prompt** radio button

8. Within the Expression 2 box, select the **New Prompt** link

Results: The Edit Prompt Properties page appears

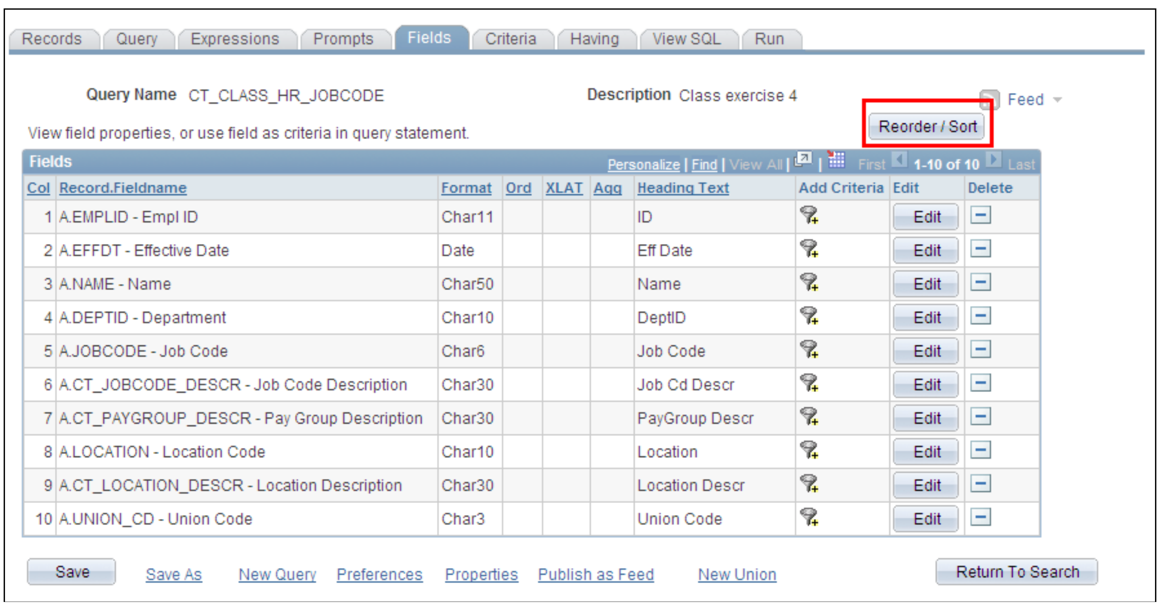
9. Locate the Heading Text field and enter **Union Code =**

10. Select **Ok**

Results: You have successfully added a prompt for **UNION_CD**

Reorder/Sort

11. On the Fields Tab, select the **Reorder/Sort** button, which will bring you to the **Edit Field Ordering** page

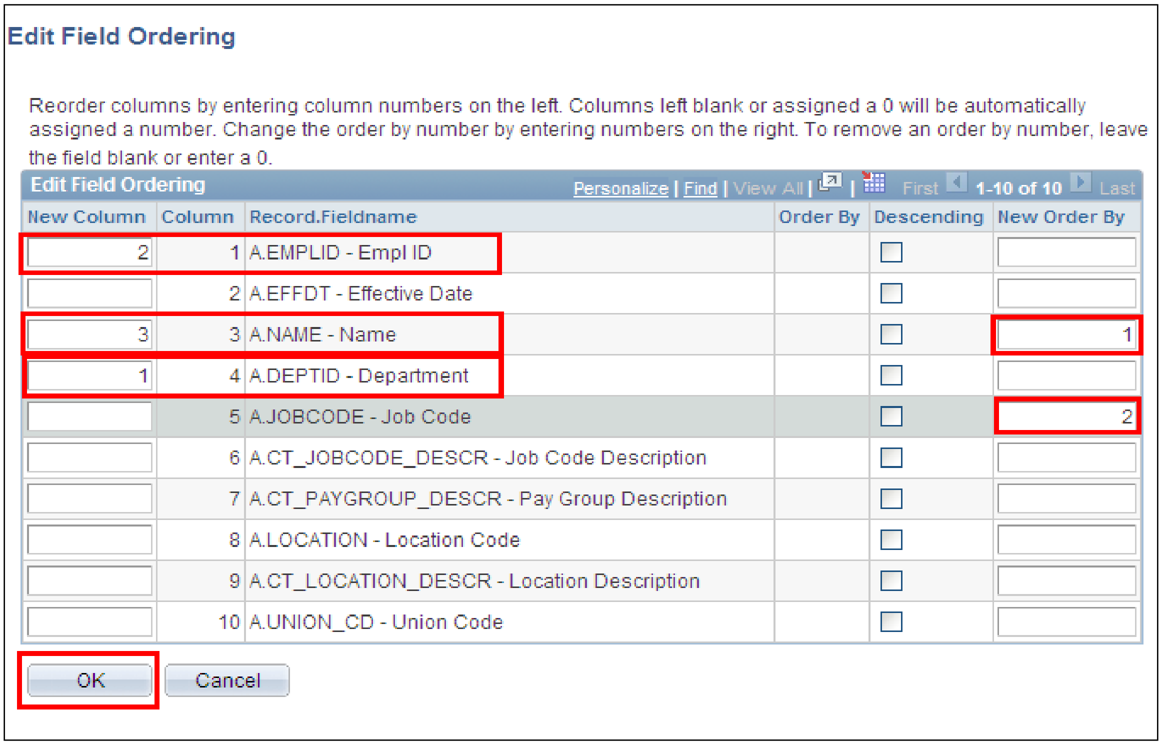


12. Determine the order in which you would like the data to appear on the final report and the order in which the data should be sorted

13. To reorder the data fields, enter in the left hand column the numeral 1 next to the **DEPTID** field to display the Department Id first. Then, enter the numeral 2 next to the **EMPLID** field. Lastly, enter the numeral 3 next to the **NAME** field.

14. To sort alphabetically, enter in the right hand column the numeral 1 next to the **NAME** field and choose **ascending** by **<u>leaving unchecked</u>** the descending option. Then sort employees by their job code, enter the numeral 2 next to the **JOBCODE** field and choose **ascending.**

15. Select **OK** which will return you to the **Fields** tab and select **SAVE** to save query



Edit Field Ordering

Reorder columns by entering column numbers on the left. Columns left blank or assigned a 0 will be automatically assigned a number. Change the order by number by entering numbers on the right. To remove an order by number, leave the field blank or enter a 0.

Edit Field Ordering — Personalize | Find | View All | First 1-10 of 10 Last

New Column	Column	Record.Fieldname	Order By	Descending	New Order By
2	1	A.EMPLID - Empl ID		☐	
	2	A.EFFDT - Effective Date		☐	
3	3	A.NAME - Name		☐	1
1	4	A.DEPTID - Department		☐	
	5	A.JOBCODE - Job Code		☐	2
	6	A.CT_JOBCODE_DESCR - Job Code Description		☐	
	7	A.CT_PAYGROUP_DESCR - Pay Group Description		☐	
	8	A.LOCATION - Location Code		☐	
	9	A.CT_LOCATION_DESCR - Location Description		☐	
	10	A.UNION_CD - Union Code		☐	

OK Cancel

Test Query

16. Return to Search and enter the query name in the search engine. Select **Run to Excel** located to the right of your saved query name on the **Query Manager** page

Results: An Excel spreadsheet will generate and display the results of your query. Note the differences in report format from Exercise 3. If appropriate, save to a location of your choice and evaluate the data.

Exercise 5: Create a Positions Query

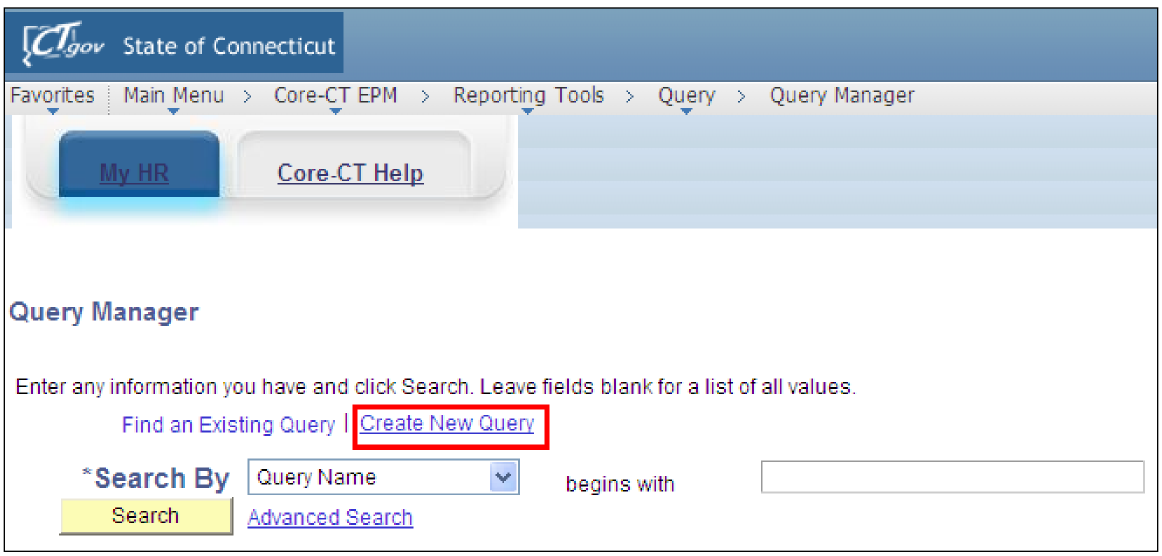
Scenario: Build a query to provide a list of positions that are currently approved.

Skills: Creating a Query, data sampling, adding criteria, effective dated record

Reference: EPM Data Dictionary, HRMS Reporting Table Summary

Navigation: Main Menu > Core-CT EPM > Reporting Tools > Query > Query Manager

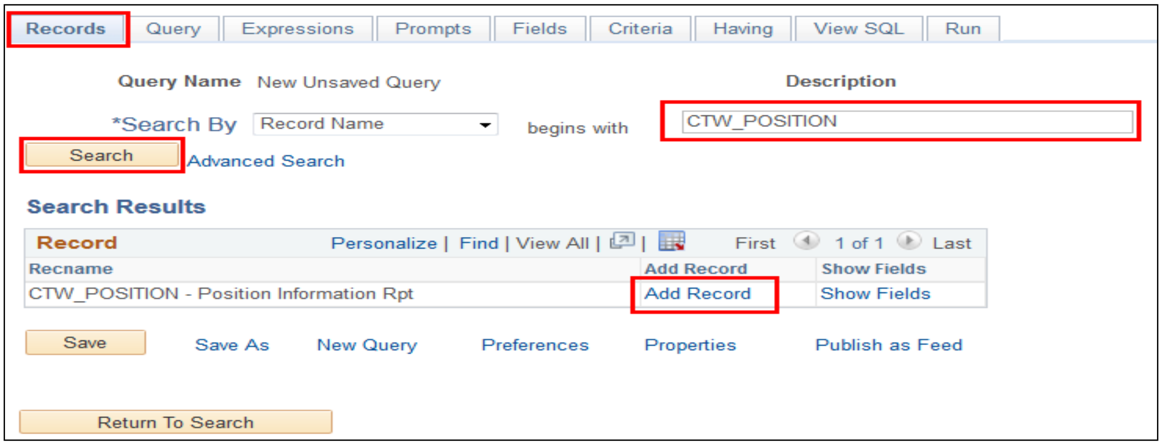
1. On the Query Manager page, select the **Create New Query** link, which will automatically take you to the records tab



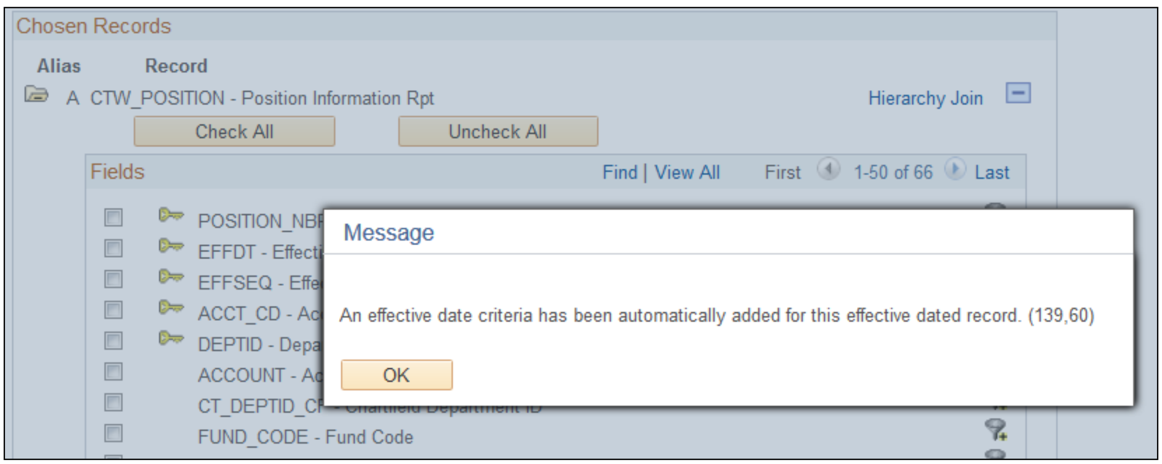
2. Enter **CTW_POSITION** in the Search By>Record Name search field

3. Select **Search**

4. On the search results page, select **Add Record** which is located right of the record name, **CTW_POSITION**



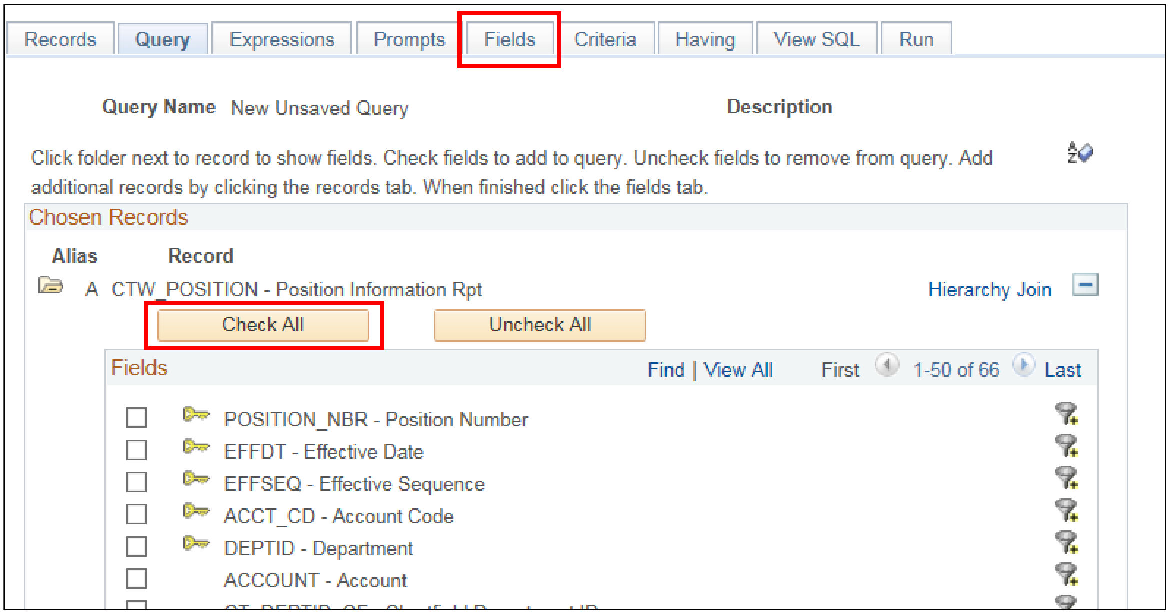
Results: Upon adding the record, the effective date pop up notification appears stating, An effective date criteria has been automatically added for this effective dated record.



5. Select **Ok**. You are now on the Query tab.

6. Within the listing of fields, select the **CHECK ALL** button and ensure that all fields have been checked.

7. Locate and select the **Fields** tab located at the top of the page

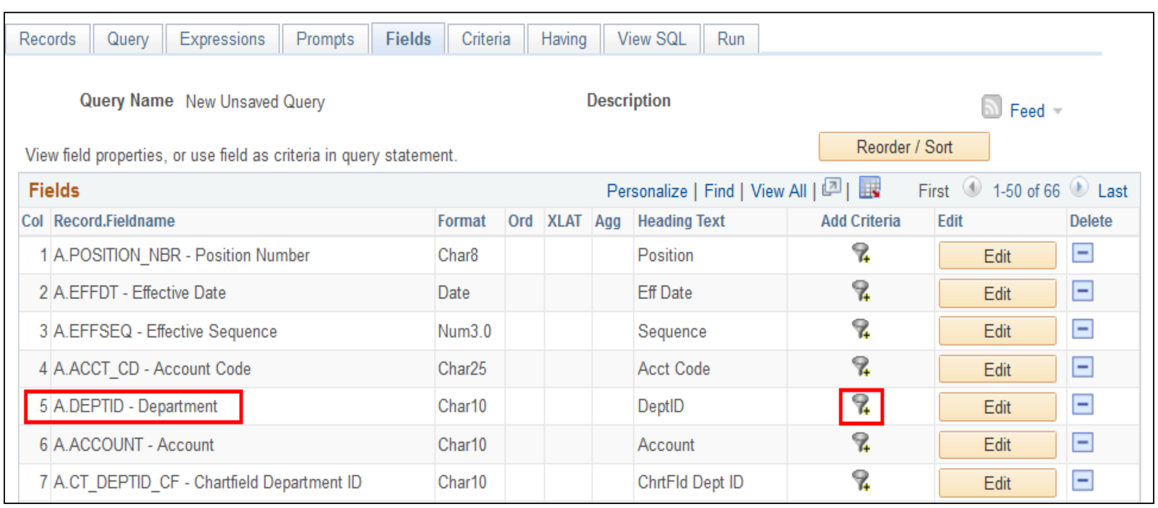


To add criteria to a reporting Field from the Fields tab

8. Locate the Field titled, **DEPTID,** on the Fields tab

9. Select the Add Criteria icon represented by the picture of a funnel located to the right of the Field name, **DEPTID**

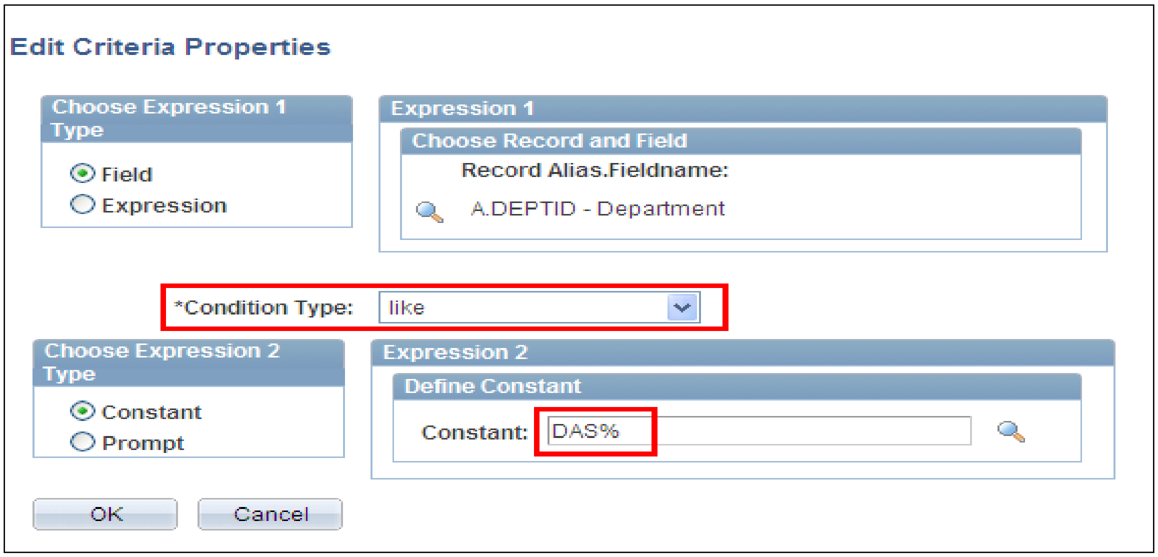
Results: The Edit Criteria Properties page appears for the Field, **DEPTID**



10. Select **like** as a condition type from the drop down menu

11. Within the Expression 2 > Define Constant box, enter the first three letters of your agency followed by the percent sign (%)

Results: You have established selection criteria for the Field, **DEPTID**, using the wildcard (%) which will return all agency employees.



12. Click **OK**

To add criteria/prompt to a reporting Field from the Fields tab

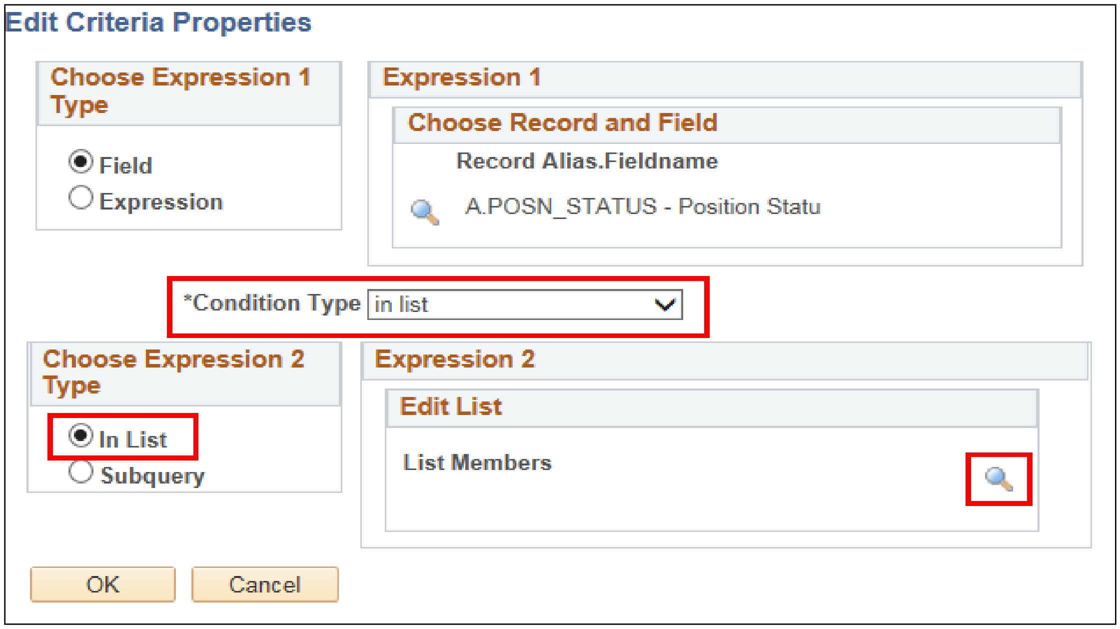
13. locate the Field titled, **POSN_STATUS,** on the Fields tab

14. Select the Add Criteria icon represented by the picture of a funnel located to the right of the Field name, **POSN_STATUS**

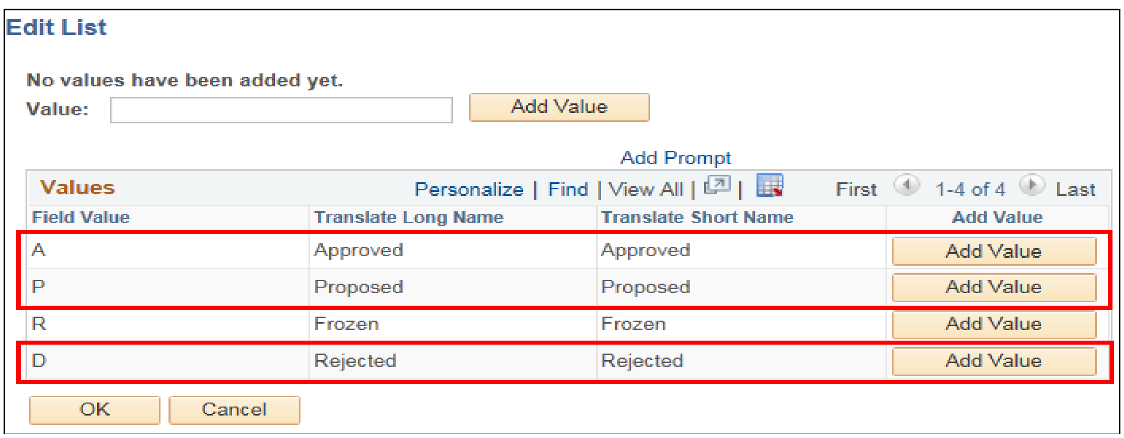
Results: The Edit Criteria Properties page appears for the Field, **POSN_STATUS**

15. Select **in list** as a condition type from the drop down menu

16. Select the looking glass icon located within the Expression 2 > Edit List to display the predetermined values for this field



17. Click the **Add Value** link for the following values: A – Approved, P – Proposed, and D - Rejected



18. Click **OK** after validating the list of members on the Edit Criteria Properties page.

To add criteria/prompt to a reporting Field from the Fields tab

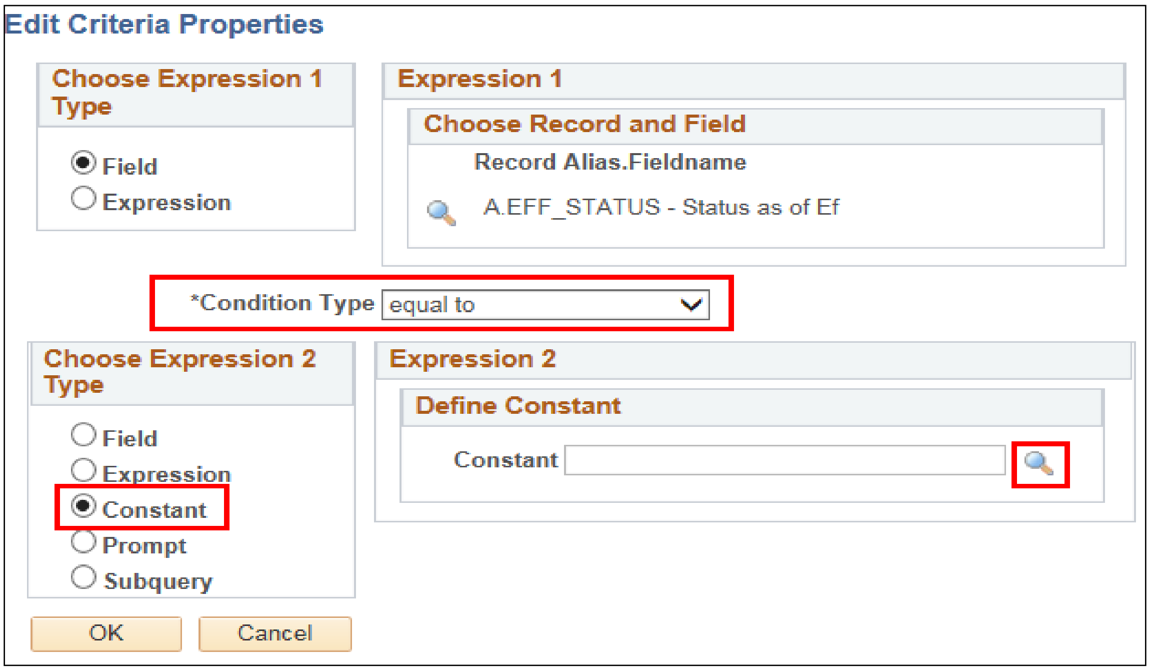
19. locate the Field titled, **EFF_STATUS,** on the Fields tab

20. Select the Add Criteria icon represented by the picture of a funnel located to the right of the Field name, **EFF_STATUS**

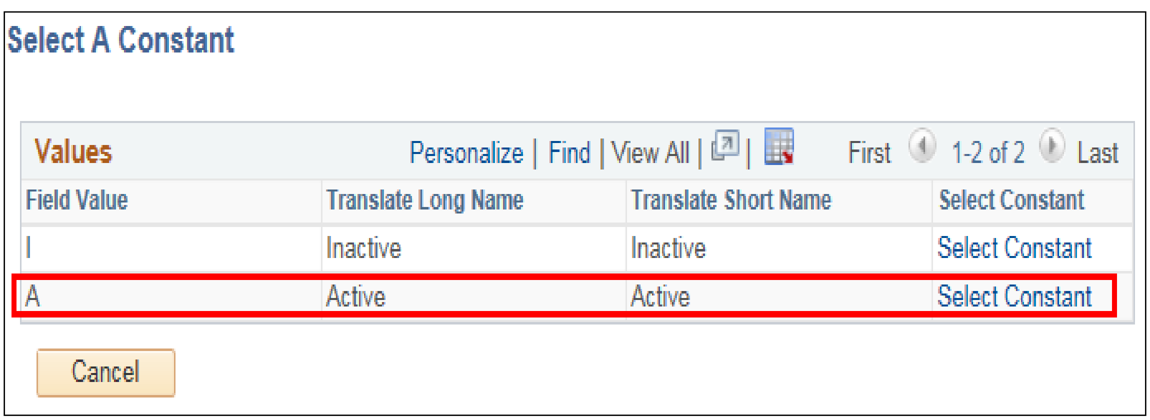
Results: The Edit Criteria Properties page appears for the Field, **EFF_STATUS**

21. Select **equal to** as a condition type from the drop down menu

22. Select the looking glass icon located within the Expression 2 > Define Constant to display the predetermined values for this field



23. Click the **Select Constant** link for the value of A – Active

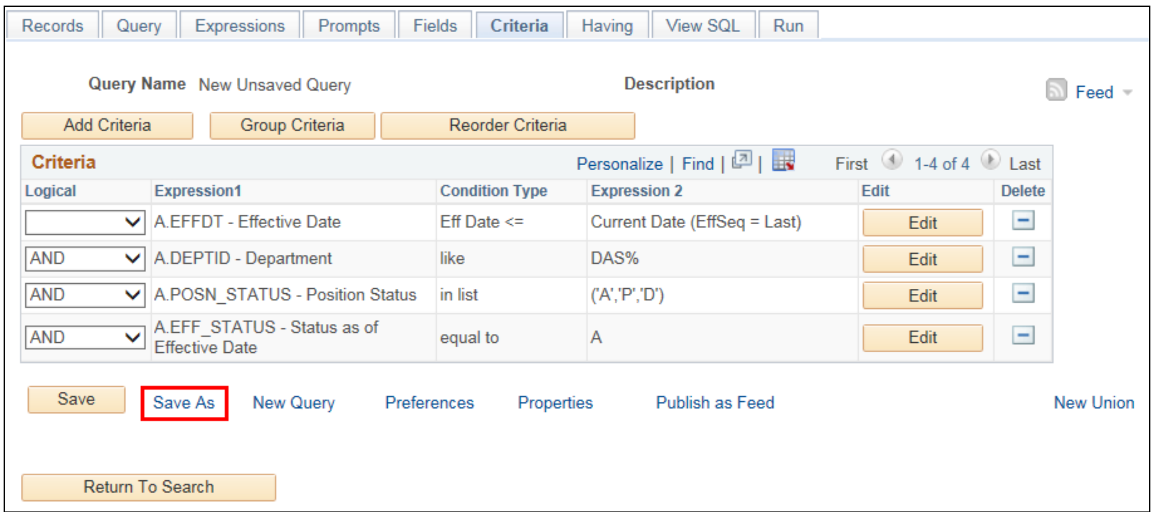


24. Click **OK** after validating the list of members on the Edit Criteria Properties page.

Review and Save

25. Select **Save As** located in the row of links at the bottom of the query page to save your query.

26. Name your query using standard naming conventions, descriptions as well as identify a folder to save in, if appropriate. Note: All queries should be saved as PRIVATE.



Test Query

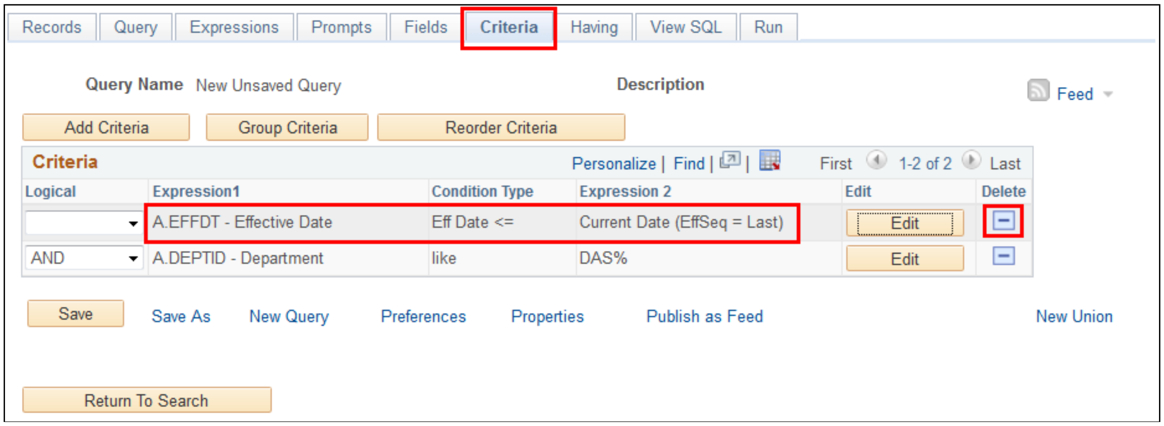
27. Select **Run to Excel** located to the right of your saved query name on the Query Manager page

Results: An Excel spreadsheet will generate and display the results of your query. If appropriate, save to a location of your choice and evaluate the data.

To view historical information

28. Select the **Edit** link located to the right of your saved query name on the **Query Manager** page, which will bring you to the **Fields** tab

29. Select the **Criteria** tab and select the delete button marked as a minus sign (-) next to the row of criteria labeled, **A.EFFDT-Effective Date Eff Date <= Current Date (EffSeq = Last).**



Results: You have now eliminated the effective date criteria which limited the results to only the most current information. Elimination of the effective date criteria allows the display of historical, current and future dated rows.

30. Select **SAVE** to save your query or **SAVE AS** to save your query under a different name/folder.

Exercise 6: Create An Employee List Query

Scenario: Create a listing of all employees in each separate location of your agency, including hire date and union.

Skills: Creating a Query, adding criteria, effective dated record, sort order

Reference: EPM Data Dictionary, HRMS Reporting Table Summary

Navigation: Main Menu > Core-CT EPM > Reporting Tools > Query > Query Manager

1. Select the **Create New Query** link, which will automatically take you to the records tab

2. Enter **CTW_EMPLOYEE_VW** in the Search By>Record Name search field

3. Select **Search**

4. On the search results page, select **Add Record** which is located right of the record name, **CTW_EMPLOYEE_VW**

Results: Upon adding the record, the effective date pop up notification appears stating, An effective date criteria has been automatically added for this effective dated record.

5. Acknowledge the Effective Date criteria by selecting **Ok**. You are now on the Query tab.

6. Within the listing of fields, select the following fields: **EMPLID, NAME, DEPTID, CT_DEPT_DESCR, LOCATION, CT_LOCATION_DESCR, EMPL_STATUS, JOBCODE, CT_JOBCODE_DESCR, UNION_CD**

7. Locate and select the **Fields** tab

To add criteria to a reporting Field from the Fields tab

8. Locate the Field titled, **EMPL_STATUS,** on the Fields tab

9. Select the Add Criteria icon represented by the picture of a funnel located to the right of the Field name, **EMPL_STATUS**

Results: The Edit Criteria Properties page appears for the Field, **EMPL_STATUS**

10. Select **in list** as a condition type from the drop down menu

11. Select the looking glass icon located within the Expression 2>Edit List to display the predetermined values for this field

12. Select the **add value** key for the following values: A=active, L=leave of absence, P=leave w/pay, and S=suspended

13. After selecting add value for each value desired, then select **OK** twice

Results: You have established selection criteria for the Field, EMPLOYEE STATUS. **PLEASE NOTE: If you are required to enter alpha values, make sure these are capitalized.**

To Sort

14. On the Fields tab, select the **Reorder/Sort** button, which will bring you to the Edit Field Ordering page

15. In the right hand column, enter the numeral 1 next to the Field, **DEPTID**. Enter the numeral 2 next to the Field, **LOCATION.** Note: The default for sort order is ascending. If you wish for the data to be in descending order, select the box under the Column Order by Descending.

16. Select **OK** which will return you to the **Fields** tab

Review and Save

17. Select **Save As** located in the row of links at the bottom of the query page to save your query.

18. Name your query using standard naming conventions, description as well as identify a folder to save in, if appropriate. Note: All queries should be saved as PRIVATE.

Test Query

19. Select **Run to Excel** located to the right of your saved query name on the Query Manager page

Results: An Excel spreadsheet will generate and display the results of your query. If appropriate, save to a location of your choice and evaluate the data.

Exercise 7: Create A Benefits Billing Query

Scenario: Design a query to return all agency employees active in benefits billing for medical and dental insurance.

Skills: Creating a Query, adding criteria, prompts, effective date

Reference: EPM Data Dictionary, HRMS Reporting Table Summary

Navigation: Main Menu > Core-CT EPM > Reporting Tools > Query > Query Manager

1. Select the **Create New Query** link, which will automatically take you to the records tab

2. Enter **CTW_BEN_BILL_VW** in the Search By>Record Name search field

3. Select **Search**

4. On the search results page, select **Add Record** which is located right of the record name, **CTW_BEN_BILL_VW**

Results: Upon adding the record, the effective date pop up notification appears stating, "An effective date criteria has been automatically added for this effective dated record."

5. Select **Ok**. You are now on the Query tab.

6. Within the listing of fields, select the following fields: **EMPLID, PLAN_TYPE, EFFDT, DEPTID, BILLING_STATUS, BILLING_REASON**

7. Locate and select the **Fields** tab

To add criteria to a reporting Field from the Fields tab

8. Locate the Field titled, **PLAN_TYPE,** on the Fields tab

9. Select the Add Criteria icon represented by the picture of a funnel located to the right of the Field name, **PLAN_TYPE**

Results: The Edit Criteria Properties page appears for the Field, **PLAN_TYPE**

10. Select **in list** as a condition type from the drop down menu

11. Select the looking glass icon located within the Expression 2>Edit List to display the predetermined values for this field

12. Select the **add value** key for the following values: 10 and 11

13. Select **OK** after validating the list of members displayed on the Edit Criteria Properties page.

Results: The criteria limiting the query to the medical and dental plan types are set up in a list format.

14. Locate the Field titled, **BILLING_STATUS,** on the Fields tab

15. Select the Add Criteria icon represented by the picture of a funnel located to the right of the Field name, **BILLING_STATUS**

Results: The Edit Criteria Properties page appears for the Field, **BILLING_STATUS**

16. Select **equal to** as a condition type from the drop down menu

17. Within the Choose Expression 2 Type, select the **constant** button

18. Within the Expression 2 box, enter **A** to define the constant value of available for billing.

19. Select **OK**

Results: You have established selection criteria for the Field, **BILLING_STATUS**. **PLEASE NOTE:** You can set the constant by either typing in the value or choosing it from the predefined values by selecting the looking glass and then selecting the appropriate value

To add criteria/prompt to a reporting Field from the Fields tab

20. Locate the Field titled, **DEPTID,** on the Fields tab

21. Select the Add Criteria icon represented by the picture of a funnel located to the right of the Field name, **DEPTID**

Results: The Edit Criteria Properties page appears for the Field, **DEPTID**

22. Select **like** as a condition type from the drop down menu

23. Within the Choose Expression 2 Type, select the **prompt** button

24. Within the Expression 2 box, select the **New Prompt** link

Results: The Edit Prompt Properties page appears. **Remember: Prompts cannot be reordered; they must be created in the order they will appear at runtime.**

25. Locate the Heading Text field and enter **Department (like** %)

26. Select **Ok** twice

Review and Save

27. Select **Save As** located in the row of links at the bottom of the query page to save your query.

28. Name your query using standard naming conventions, description as well as identify a folder to save in, if appropriate. Note: All queries should be saved as PRIVATE.

Test Query

29. Select **Run to Excel** located to the right of your saved query name on the Query Manager page

Results: An Excel spreadsheet will generate and display the results of your query. If appropriate, save to a location of your choice and evaluate the data.

Exercise 8: Create An Employee Query, Joining Tables

Scenario: Design a query to identify all employees who have filed workers compensation claims after a certain date.

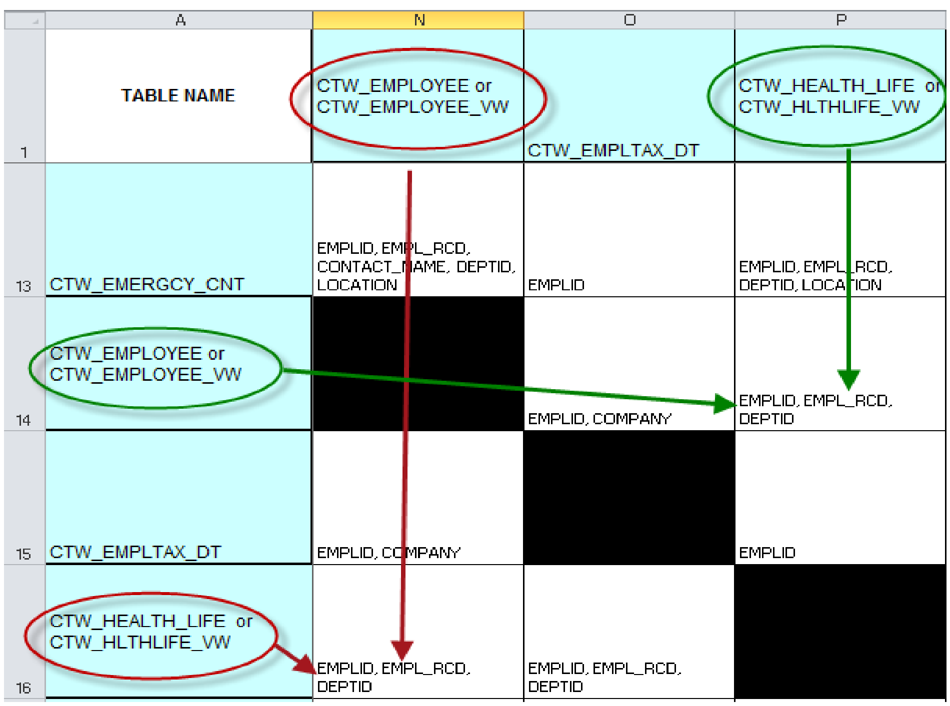
Skills: Creating a New Query, join tables, prompts, translate values

Reference: EPM Data Dictionary, HRMS Reporting Table Summary, EPM Job Aid: Reporting Table Indexes and Join Criteria

First, employee workers compensation information is located on the reporting table, **CTW_HLTH_SF_VW**, and employee information on the reporting table, **CTW_EMPLOYEE_VW**

Second, utilizing the EPM Job Aid – ***Reporting Table Indexes and Join Criteria*** (embedded excel spreadsheet), determine whether or not these two tables can be joined.

Note: The two tables can be successfully joined by the fields: **EMPLID** and **EMPL_RCD**



	A	N	O	P
1	TABLE NAME	CTW_EMPLOYEE or CTW_EMPLOYEE_VW	CTW_EMPLTAX_DT	CTW_HEALTH_LIFE or CTW_HLTHLIFE_VW
13	CTW_EMERGCY_CNT	EMPLID, EMPL_RCD, CONTACT_NAME, DEPTID, LOCATION	EMPLID	EMPLID, EMPL_RCD, DEPTID, LOCATION
14	CTW_EMPLOYEE or CTW_EMPLOYEE_VW		EMPLID, COMPANY	EMPLID, EMPL_RCD, DEPTID
15	CTW_EMPLTAX_DT	EMPLID, COMPANY		EMPLID
16	CTW_HEALTH_LIFE or CTW_HLTHLIFE_VW	EMPLID, EMPL_RCD, DEPTID	EMPLID, EMPL_RCD, DEPTID	

Navigation: Main Menu > Core-CT EPM > Reporting Tools > Query > Query Manager

1. Select the **Create New Query** link, which will automatically take you to the records tab

2. Enter the primary record for the new query, **CTW_HLTH_SF_VW** in the Search By>Record Name search field

3. Select **Search**

4. On the search results page, select **Add Record** which is located right of the record name, **CTW_HLTH_SF_VW**

Results: Upon adding the record, the effective date pop up notification appears stating, “An effective date criteria has been automatically added for this effective dated record.”

5. Select **Ok**. You are now on the Query tab.

6. Within the listing of fields, select the following fields: **EMPLID, INCIDENT_NBR, CLAIM_NBR, NAME, INCIDENT_TYPE, INCIDENT_DT, DEPTID, LOCATION, CLAIM_STATUS, OPEN_DT, CLOSE_DT**

7. Return to the Records Tab to select the second record for the new query

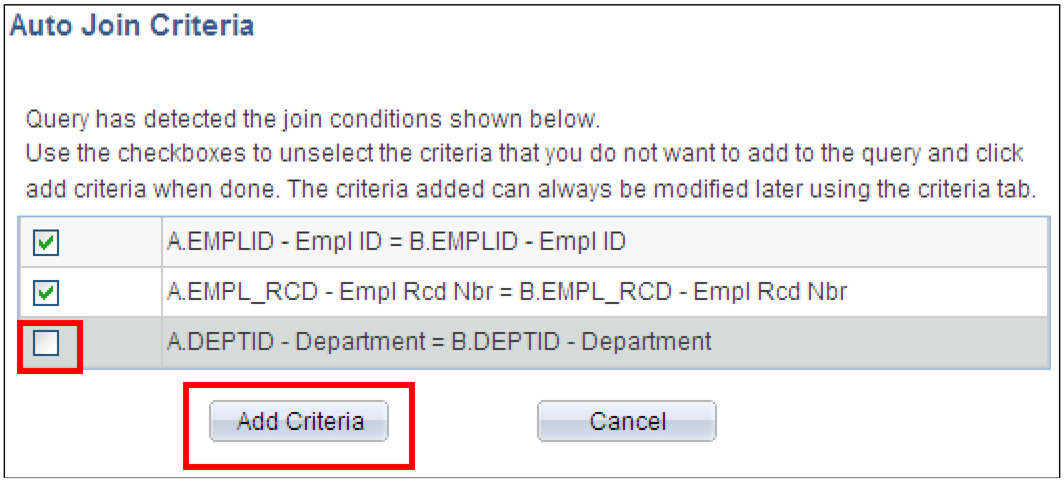
8. Enter the secondary record for the new query, **CTW_EMPLOYEE_VW** in the Search By>Record Name search field

9. Select **Search**

10. On the search results page, select **Join Record** which is located right of the record name, **CTW_EMPLOYEE_VW**

11. Select record to be joined, **CTW_HLTH_SF_VW.**

12. Auto Join Criteria page will appear. Accept the join type: **Standard Join**. Customize default criteria by deselecting the box for the join criteria **A.DEPTID=B.DEPTID.** Note: The job aid reference Reporting Table Indexes and Join Criteria indicates this to be an invalid join criterion.



13. Select Add Criteria button to accept modified default field joins. Note: A pop-up notification will appear stating that the **CTW_EMPLOYEE_VW** table is an effective dated table. Select okay to acknowledge.

14. Within the listing of fields from the record, **CTW_EMPLOYEE_VW**, select the following fields: **POSITION_NBR, CT_POSITION_DESCR, EMPL_STATUS**

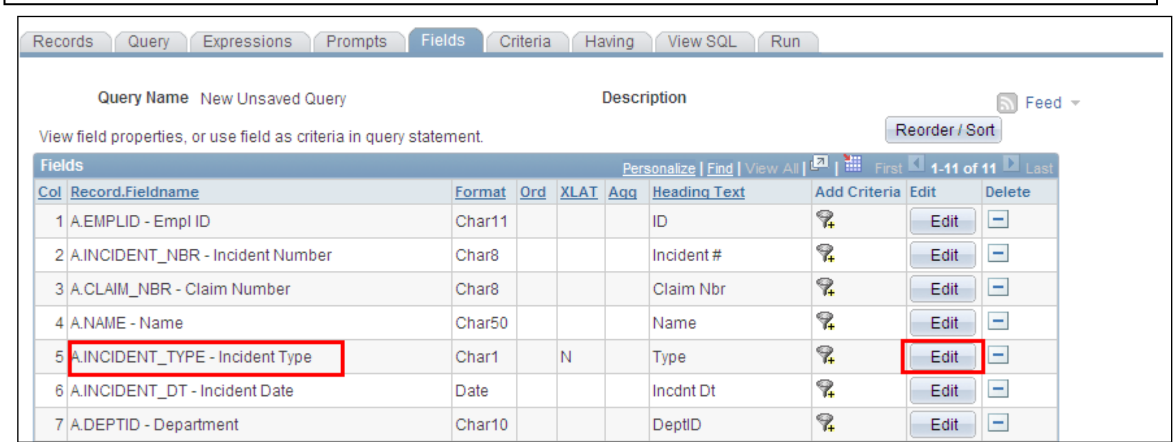
15. Locate and select the **Fields** tab located at the top of the page

To add translate values/criteria to a reporting Field from the Fields tab

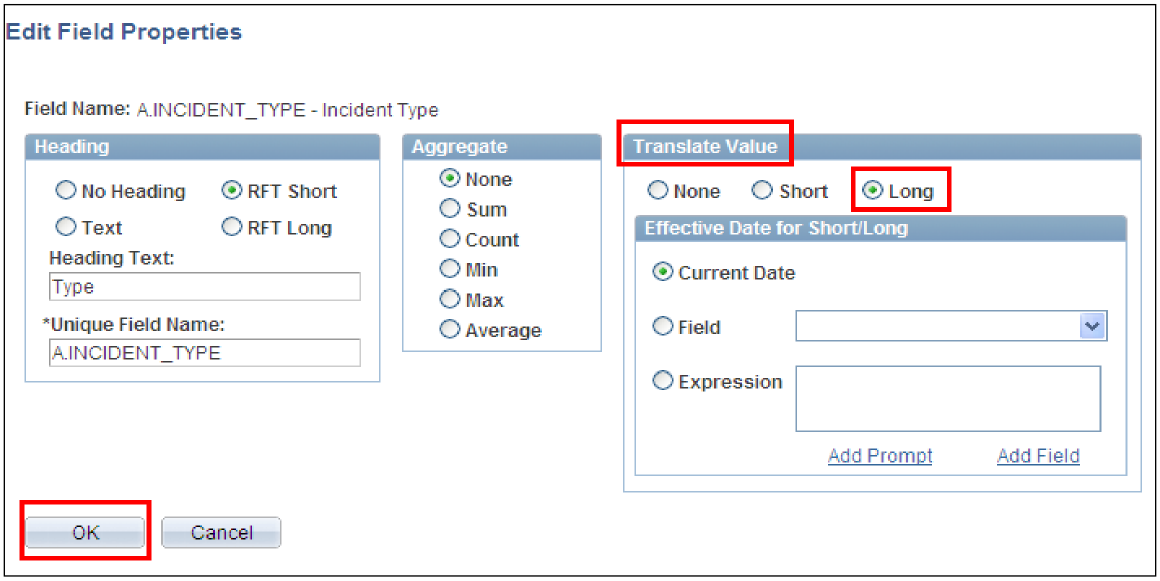
16. Locate the Field titled, **INCIDENT_TYPE,** on the Fields tab

17. Select the Edit button for the Field name, **INCIDENT_TYPE**

Results*: The Edit Field Properties page appears for the Field,* ***INCIDENT_TYPE***



18. Select **Translate Value Long** and then select **ok**



Results: The long version of the predetermined translate value has been selected. You can view the available values by selecting the looking class on the edit criteria page, accessed by the Add Criteria Icon next to the field. Translate values are only available for selected fields.

19. Locate the Field titled, **CLAIM_STATUS,** on the Fields tab

20. Select the Edit button for the Field name, **CLAIM_STATUS**

Results: The Edit Field Properties page appears for the Field, **CLAIM_STATUS**

21. Select Translate Value **Long** and then select **ok**

To add criteria/prompt to a reporting Field from the Fields tab

22. Select the Add Criteria icon represented by the picture of a funnel located to the right of the Field name, **DEPTID**

23. Select **like** as a condition type from the drop down menu

24. Within the Choose Expression 2 Type, select the **prompt** radio button

25. Within the Expression 2 box, select the **New Prompt** link

Results: The Edit Prompt Properties page appears. **Remember: Prompts cannot be reordered; they must be created in the order they will appear at runtime.**

26. Locate the Heading Text field and enter **Department (like-%)**

27. Select **Ok** twice

28. Locate the Field titled, **OPEN_DT,** on the Fields tab

29. Select the Add Criteria icon represented by the picture of a funnel located to the right of the Field name, **OPEN_DT**

Results: The Edit Criteria Properties page appears for the Field, **OPEN_DT**

30. Select **greater than** as a condition type from the drop down menu

31. Within the Choose Expression 2 Type, select the **prompt** button

32. Within the Expression 2 box, select the **New Prompt** link

Results: The Edit Prompt Properties page appears. **Remember: Prompts cannot be reordered; they must be created in the order they will appear at runtime.**

33. Locate the Heading Text field and enter **Claim Open Date >**

34. Select **Ok** twice

Review and Save

35. Select **Save As** located in the row of links at the bottom of the query page to save your query.

36. Name your query using standard naming conventions, description as well as identify a folder to save in, if appropriate. Note: All queries should be saved as PRIVATE.

Test Query

37. Select **Run to Excel** located to the right of your saved query name on the Query Manager page. Enter appropriate values when prompted. For Department is like %, you should enter your agency's three letter code followed by the percent symbol, %. For claim open date >, enter 7/1/2009.

Results: An Excel spreadsheet will generate and display the results of your query. If appropriate, save to a location of your choice and evaluate the data.

Exercise 9: Create a Personal Data Audit Query, Joining Tables

Scenario: Design a query to audit self-service personal data updates. Current HRMS functionality allows an employee to change their personal information. Name and address changes require workflow approval. Business phone and email cannot be changed via self-service.

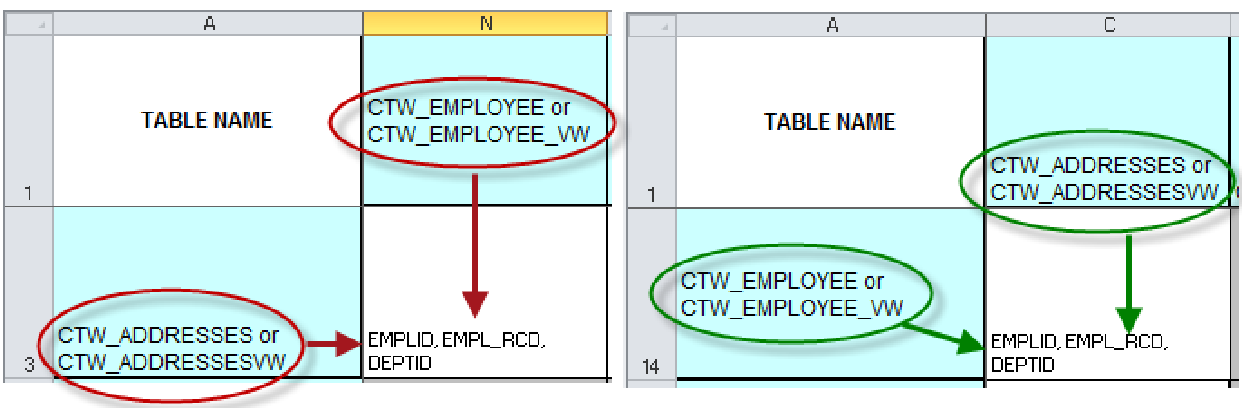
Skills: Creating a Query, adding criteria, prompts, effective date

Reference: EPM Data Dictionary, HRMS Reporting Table Summary, EPM Job Aid: Reporting Table Indexes and Join Criteria

Employee information is on the reporting table, **CTW_EMPLOYEE_VW,** and email/phone information is on **CTW_ADDRESSESVW**.

Utilizing the EPM Job Aid – ***Reporting Table Indexes and Join Criteria*** (embedded excel spreadsheet), determine whether or not these two tables can be joined.

Note: The two tables can be successfully joined by the field: **EMPLID, EMPL_RCD,** and **DEPTID**



Navigation: Main Menu > Core-CT EPM > Reporting Tools > Query > Query Manager

1. Select the **Create New Query** link, which will automatically take you to the records tab

2. Enter **CTW_EMPLOYEE_VW** in the Search By > Record Name search field

3. Select **Search**

4. On the search results page, select **Add Record** which is located right of the record name, **CTW_EMPLOYEE_VW**

Results: Upon adding the record, the effective date pop up notification appears stating, “An effective date criteria has been automatically added for this effective dated record.”

5. You are now on the Query tab.

6. Within the listing of fields, select the following fields: **EMPLID, EMPL_RCD, NAME, DEPTID, CT_JOBCODE_DESCR, CT_LOCATION_DESCR, EMPL_STATUS**

7. Return to the Records Tab to select the second record for the new query

8. Enter the secondary record for the new query, **CTW_ADDRESSESVW** in the Search By>Record Name search field

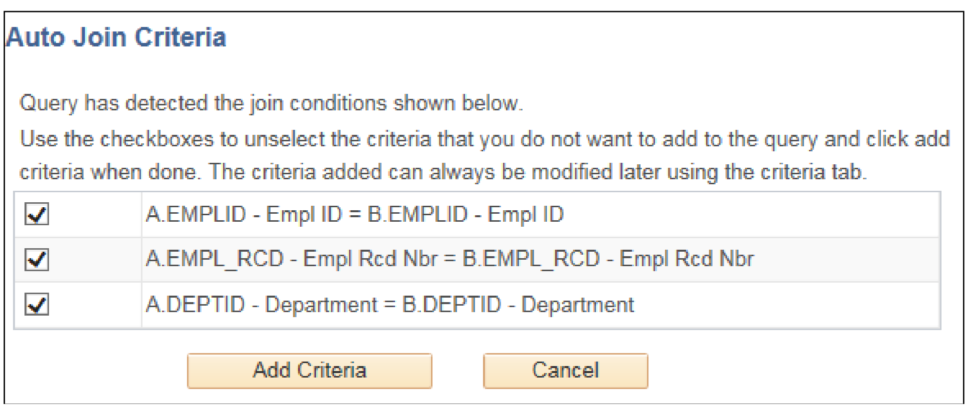
9. Select **Search**

10. On the search results page, select **Join Record** instead of Add Record for the record, **CTW_ADDRESSESVW.**

11. Select record to be joined, **CTW_ EMPLOYEE_VW.**

12. Auto Join Criteria page will appear. Accept the join type: **Standard Join**.

13. Select Add Criteria button to accept modified default field joins: **EMPLID, EMPL_RCD,** and **DEPTID**



14. Within the listing of fields from the record, **CTW_ADDRESSESVW**, select the following fields: **ADDRESS_TYPE, ADDRESS1, ADDRESS2, ADDRESS3, CITY, STATE, POSTAL**

15. Locate and select the **Fields** tab located at the top of the page

To add criteria to a reporting Field from the Fields tab

16. Locate the Field titled, **EMPL_STATUS,** on the Fields tab

17. Select the Add Criteria icon represented by the picture of a funnel located to the right of the Field name, **EMPL_STATUS**

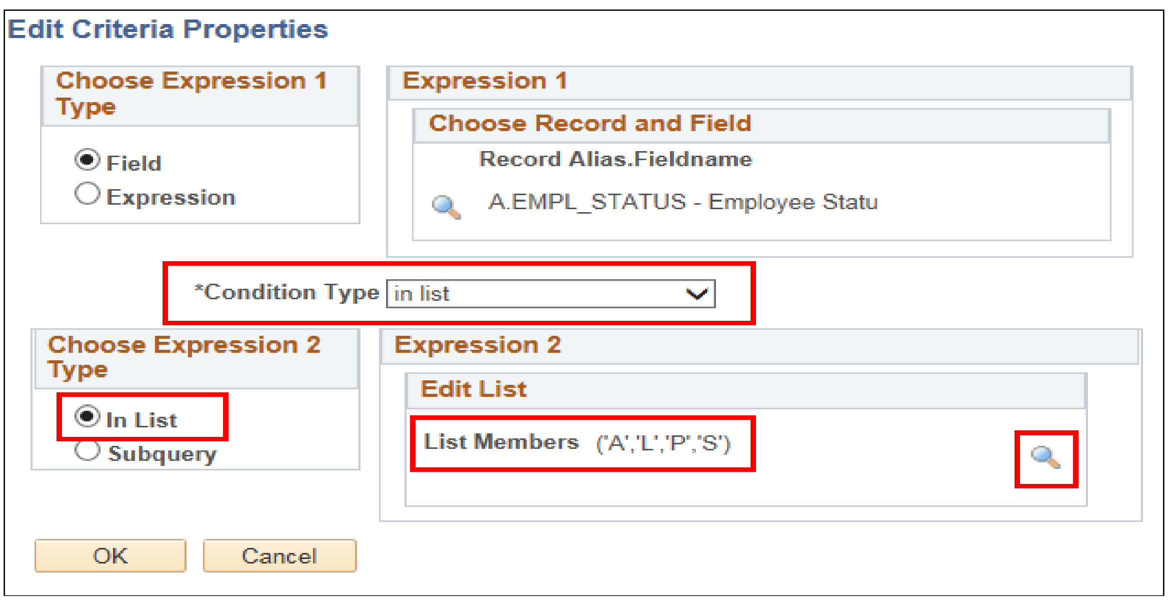
Results: The Edit Criteria Properties page appears for the Field, **EMPL_STATUS**

18. Select **in list** as a condition type from the drop down menu

19. Select the looking glass icon located within the Expression 2 > Edit List to display the predetermined values for this field

20. Select the **add value** key for the following values: A – Active, L – Leave, P – Leave w/Py, and S - Suspended

21. Select **OK** after validating the list of members displayed on the Edit Criteria Properties page.



To add criteria/prompt to a reporting Field from the Fields tab

22. Locate the Field titled, **DEPTID,** on the Fields tab

23. Select the Add Criteria icon represented by the picture of a funnel located to the right of the Field name, **DEPTID**

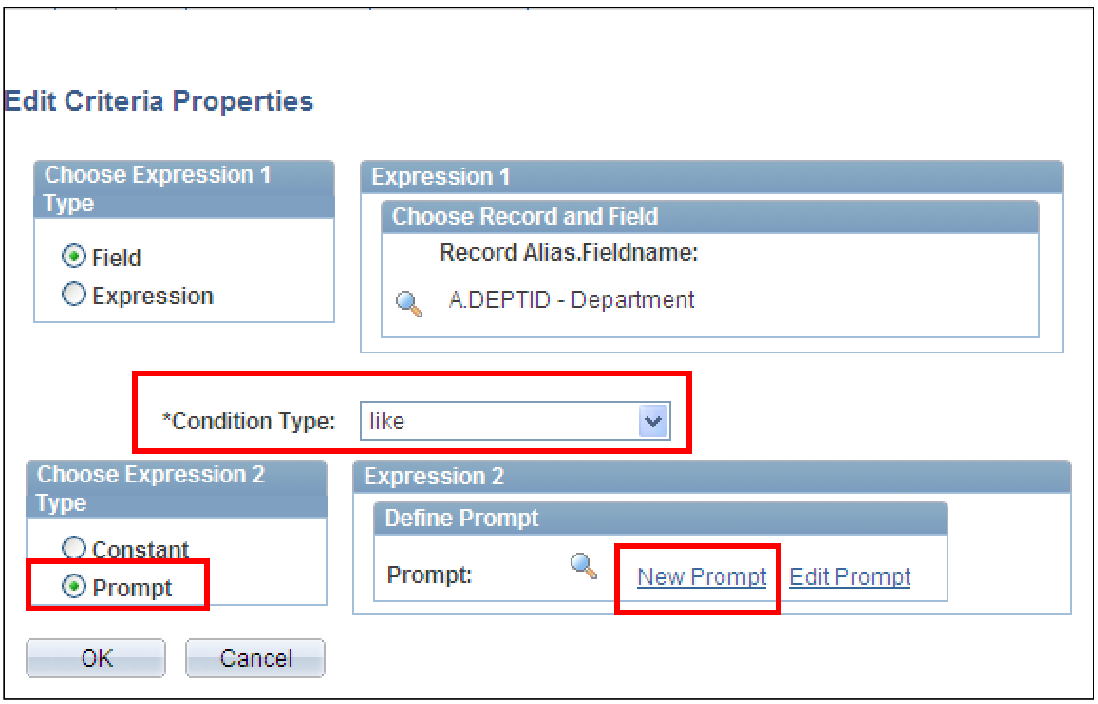
Results: The Edit Criteria Properties page appears for the Field, **DEPTID**

24. Select **like** as a condition type from the drop down menu

25. Within the Choose Expression 2 Type, select the **prompt** button

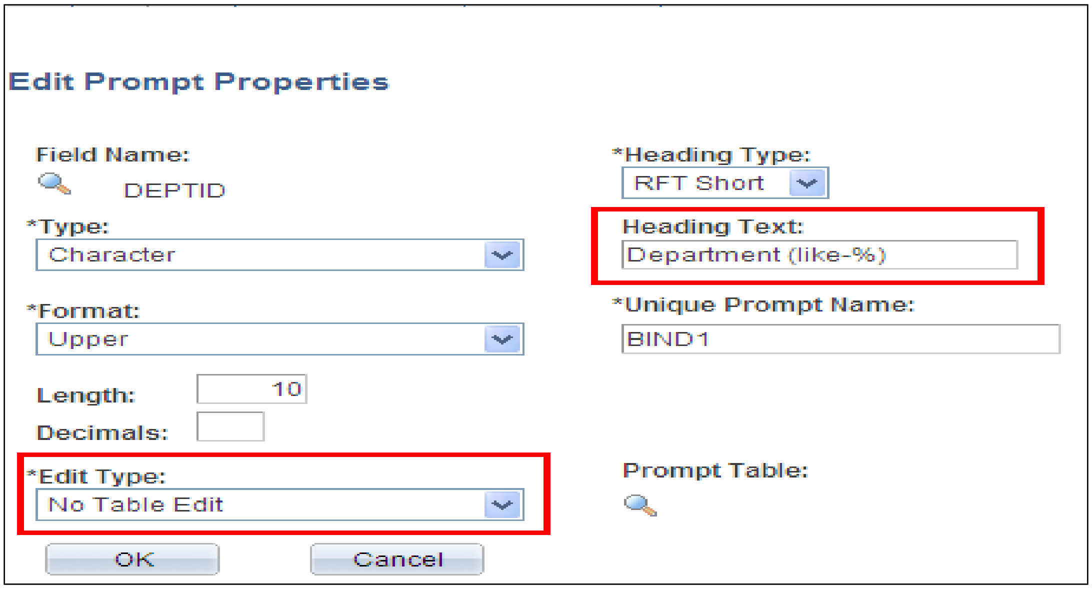
26. Within the Expression 2 > Define Prompt box, select the **New Prompt** link

Results: The Edit Prompt Properties page appears. **Remember: Prompts cannot be reordered; they must be created in the order they will appear at runtime.**



27. Locate the Heading Text field and enter **Department (like-** %)

28. Select **Ok** twice



To add criteria/prompt to a reporting Field from the Fields tab

29. locate the Field titled, **ADDRESS_TYPE,** on the Fields tab

30. Select the Add Criteria icon represented by the picture of a funnel located to the right of the Field name, **ADDRESS_TYPE**

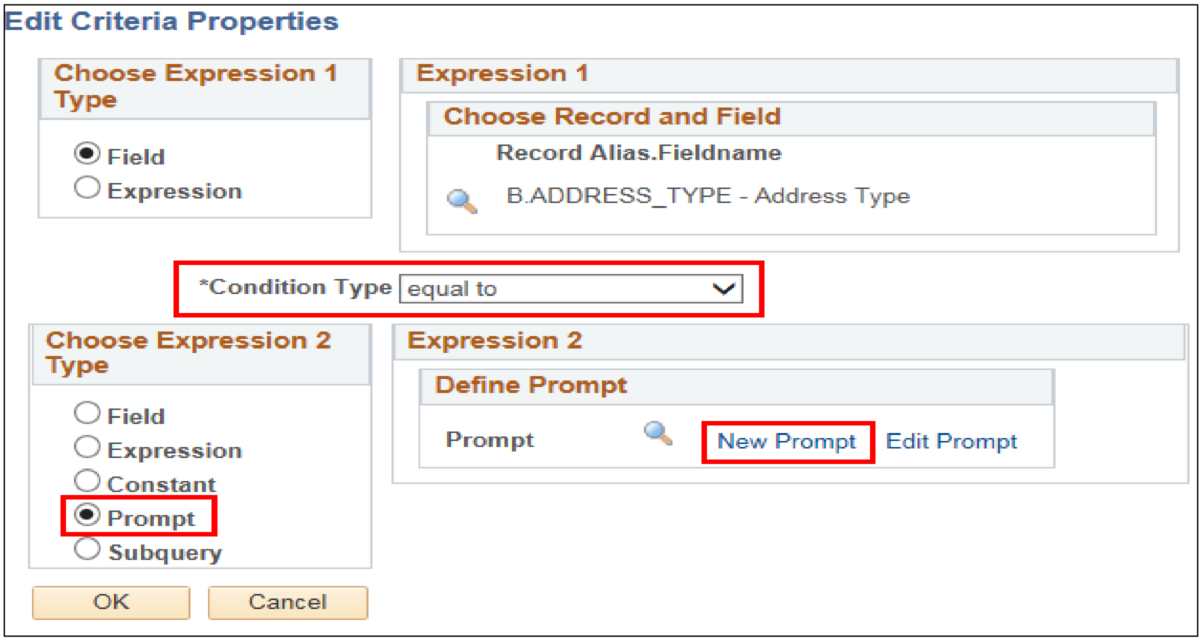
Results: The Edit Criteria Properties page appears for the Field, **ADDRESS_TYPE**

31. Select **equal to** as a condition type from the drop down menu

32. Within the Choose Expression 2 Type, select the **prompt** button

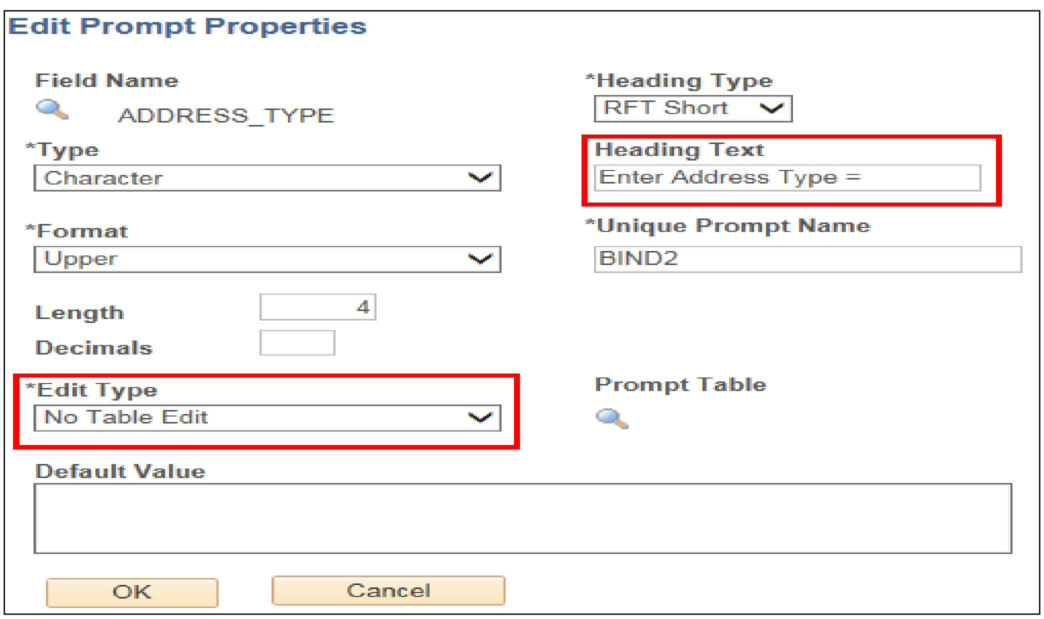
33. Within the Expression 2 > Define Prompt box, select the **New Prompt** link

Results: The Edit Prompt Properties page appears. **Remember: Prompts cannot be reordered; they must be created in the order they will appear at runtime.**



34. Locate the Heading Text field and enter **Enter Address Type =**

35. Select **Ok** twice



Review and Save

36. Select **Save As** located in the row of links at the bottom of the query page to save your query.

37. Name your query using standard naming conventions, description as well as identify a folder to save in, if appropriate. Note: All queries should be saved as PRIVATE.

Test Query

38. Select **Run to Excel** located to the right of your saved query name on the Query Manager page

39. Enter one of the following prompt values for **ADDRESS_TYPE:**

BILL	LEGL
BUSN	MAIL
CAMP	OTH
CHK	OTH2
DORM	PERM
EGWP	PREF
HOME	

Results: An Excel spreadsheet will generate and display the results of your query. If appropriate, save to a location of your choice and evaluate the data.

Exercise 10: Create a Position Query, Joining Tables

Scenario: Design a query returning position funding sources for all active employees in your agency.

Skills: Creating a Query, join tables, prompts, adding criteria, effective date

Reference: EPM Data Dictionary, HRMS Reporting Table Summary, EPM Job Aid: Reporting Table Indexes and Join Criteria

Employee information is on the reporting table, **CTW_EMPLOYEE_VW,** and position information is on **CTW_POSITION.**

Utilizing the EPM Job Aid – Reporting Table Indexes and Join Criteria (embedded excel spreadsheet), determine whether or not these two tables can be joined.

Note: The two tables can be successfully joined by the field: **POSITION_NBR**

Navigation: Main Menu > Core-CT EPM > Reporting Tools > Query > Query Manager

1. Select the **Create New Query** link, which will automatically take you to the records tab

2. Enter the primary record for the new query, **CTW_POSITION** in the Search By>Record Name search field

3. Select **Search**

4. On the search results page, select **Add Record** which is located right of the record name, **CTW_POSITION**

Results: Upon adding the record, the effective date pop up notification appears stating, "An effective date criteria has been automatically added for this effective dated record."

5. Select **Ok**. You are now on the Query tab.

6. Within the listing of fields, select the following fields: **DEPTID, POSITION_NBR, CT_POSITION_DESCR, ACCT_CD, FUND_CODE, CLASS_FLD, PROGRAM_CODE, PROJECT_ID, BUDGET_REF, DIST_PCT, UNION_CD, MAX_HEAD_COUNT, POSN_STATUS**

7. Return to the Records Tab to select the second record for the new query

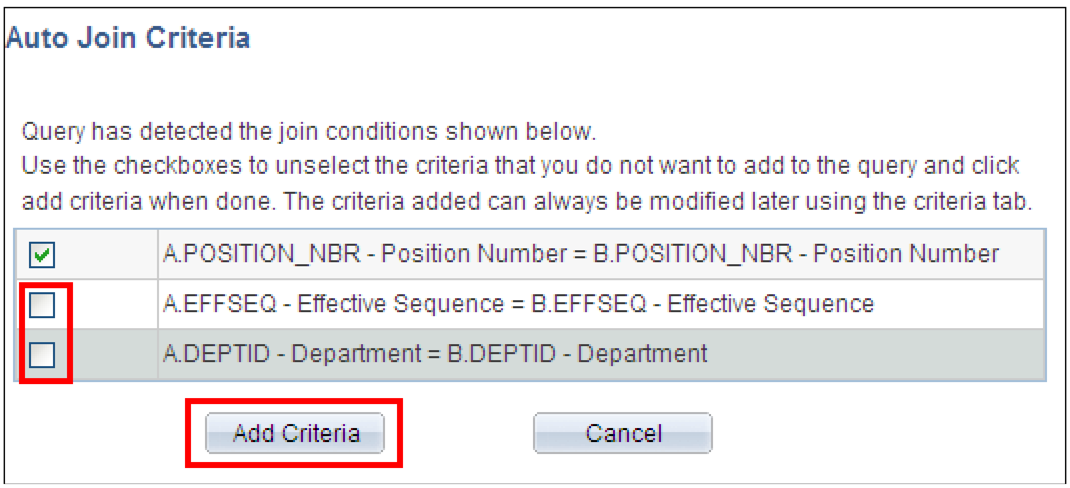
8. Enter the secondary record for the new query, **CTW_EMPLOYEE_VW** in the Search By > Record Name search field

9. Select **Search**

10. On the search results page, select **Join Record** which is located right of the record name, **CTW_EMPLOYEE_VW**

11. Select record to be joined, **CTW_POSITION.**

12. Auto Join Criteria page will appear. Accept join type: **Standard Join**. Customize default criteria by deselecting the box for the join criteria: **A.EFFSEQ=B.EFFSEQ, A.DEPTID=B.DEPTID.** Note: The job aid reference Reporting Table Indexes and Join Criteria indicates this to be invalid join criteria.



13. Select Add Criteria button to accept modified default field joins. Note: A pop-up notification will appear stating that the **CTW_EMPLOYEE_VW** table is an effective dated table. Select okay to acknowledge.

14. Within the listing of fields from the record, **CTW_EMPLOYEE_VW**, select the following fields: **EMPLID, EMPL_RCD, EFFDT, EMPL_STATUS, LOCATION, CT_LOCATION_DESCR, NAME, ACTION, CT_ACTRSN_DESCR, ACTION_DT**

15. Locate and select the **Fields** tab

To add criteria/prompt to a reporting Field from the Fields tab

16. Select the Add Criteria icon represented by the picture of a funnel located to the right of the Field name, **EMPL_STATUS**

17. Select **in list** as a condition type from the drop down menu

18. Select the looking glass icon located within the Expression 2, Edit List to display the predetermined values for this field

19. Select the **add value** key for the following values: A – Active, L – Leave, P – Leave w/Py, and S – Suspended.

20. Select **OK** after validating the list of members displayed on the Edit Criteria Properties page

Results: You have established selection criteria for the Field, **EMPL_STATUS**.

NOTE: If you are required to enter alpha values, make sure these are capitalized.

21. Locate the Field titled, **DEPTID,** on the Fields tab

22. Select the Add Criteria icon represented by the picture of a funnel located to the right of the Field name, **DEPTID**

23. Select **like** as a condition type from the drop down menu

24. Within the Choose Expression 2 Type, select the **prompt** radio button

25. Within the Expression 2 box, select the **New Prompt** link

Results: The Edit Prompt Properties page appears. **Remember: Prompts cannot be reordered; they must be created in the order they will appear at runtime.**

26. Locate the Heading Text field and enter **Department (like-** %)

27. Select **Ok** twice

Review and Save

28. Select **Save As** located in the row of links at the bottom of the query page to save your query.

29. Name your query using standard naming conventions, description as well as identify a folder to save in, if appropriate. Note: All queries should be saved as PRIVATE.

Test Query

30. Select **Run to Excel** located to the right of your saved query name on the Query Manager page. Enter appropriate values when prompted.

Exercise 11: Query Maintenance

Skills: Add to favorites, Copy to User, Delete Selected, Move to Folder, Rename a private query

Navigation: Main Menu > Core-CT EPM > Reporting Tools > Query > Query Manager

To rename a query

1. Enter **CLASS_ASSET** in the Search By>Record Name search field

2. Select Search

3. Select **CLASS_ASSET** query by checking the box to the left of the query name

4. Select the action button drop down menu located near the middle of the top of the page and choose **Rename Selected**.

5. Select **Go**. The **Rename Queries** page will appear.

6. Enter the new query name in the appropriate box and select **OK**. The query has been renamed. Renaming a query does not create a copy but rather actually changes the name of the existing query.

To delete a private query

7. Select the query you wish to delete from the list of private queries by checking the box to the left of the query name.

8. Select the action button drop down menu located near the middle of the top of the page and choose **Delete**. Select **Go.** ***Note: A warning/confirmation screen will appear verifying the deletion of the selected query***.

9. Verify deletion is the action you wish to perform. Select yes, if this is correct. ***Important Note: No list of queries selected to be deleted appears! Be very careful with this function!***

To copy a private query to another user

10. Select the query you wish to copy to another user by checking the box to the left of the query name.

11. Select the action button drop down menu located near the middle of the top of the page and choose **Copy to User**. Select **Go.**

12. UserID screen will appear. Enter the UserID of the person to whom you want to send the query. Upon successful copy, the sender will receive a message indicating that the query had been successfully copied to another user. The sender will then need to notify the recipient. ***Note: The UserID is the person's CORE UserID. The recipient of the query must have the appropriate security access to be able to run the query.***

To use folders and favorites

13. Search for a query and select the check box to the left of the query name

14. Select the action button drop down menu located near the middle of the top of the page and choose **Move to Folder**. Select **Go.** Folder screen will appear.

15. Select an existing folder option by selecting the drop down menu to see a list of available folders. Enter a folder name of your choice. Query has been moved to a folder for ease of search.

16. To set as a favorite, select the action button drop down menu located near the middle of the top of the page and choose **Add to Favorites**. Select **Go.**

Note: Your query will go directly to the on-screen list of favorite queries. To remove, just select the minus (-) button.