

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

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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.

Reporting Table Name: 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_.

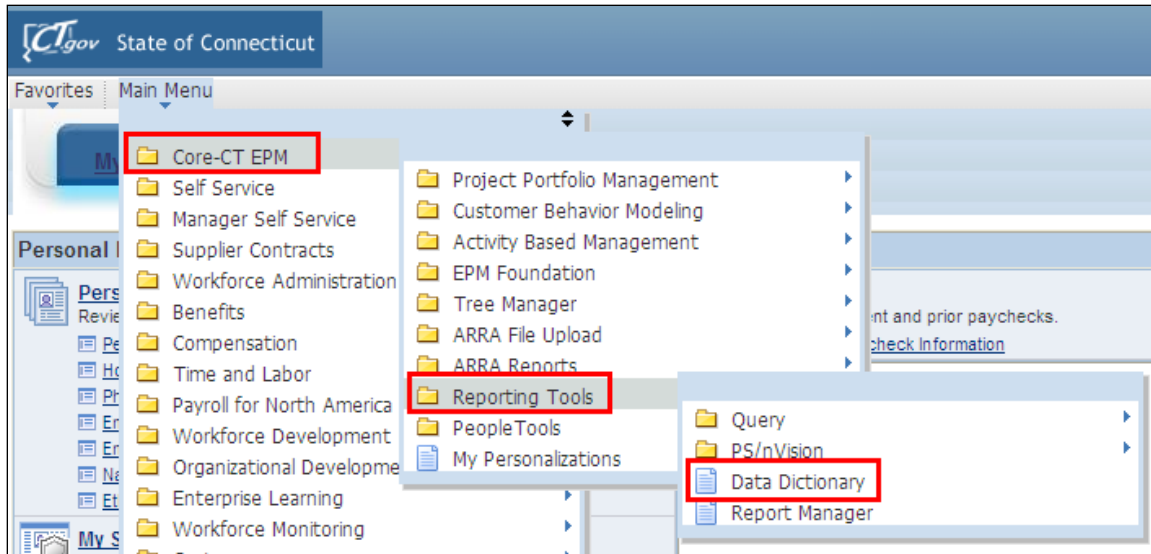
Reporting Table Field Name: Utilize this search field when you know the name of the Reporting Field and you would like to know which Reporting Tables utilize this field.
*Remember, the name of a Reporting Field utilizes a CORE CT naming convention.

Reporting Field Label Name: 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 Reporting Table Field Name
2. Select **Search**

Find an Existing Value + Add a New Value

▼ Search Criteria

Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Choose from recent searches Saved Searches Choose from saved searches

Reporting Table Name: begins with

Reporting Table Field Name: begins with

Reporting Field Label Name: begins with

[Show fewer options](#)

Case Sensitive

Search Clear

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 Reporting Table Field Name
5. Select **Search**

Find an Existing Value Add a New Value

▼ Search Criteria

Reporting Table Name: begins with ▼

Reporting Table Field Name: begins with ▼ EMPL_CLASS

Reporting Field Label Name: begins with ▼

Correct History Case Sensitive

Search Clear Basic Search Save Search Criteria

Search Results

View All First 1-2 of 2 Last

Reporting Table Name	Reporting Table Field Name	Reporting Field Label Name
CTW_EMPLOYEE	EMPL_CLASS	Employee Classification
CTW_EMPLOYEE_VW	EMPL_CLASS	Employee Classification

Results: Listing of all tables containing the field EMPL_CLASS appears

6. Select **Employee Classification** link under the table heading Reporting Field Label Name

EPM Data Dictionary

Reporting Table Name: CTW_EMPLOYEE Employee Information Rpt

Field Name: EMPL_CLASS Employee Classification

Field Definition:
Employee Appointment Type

Field Value(s)	Status - Field Value Description(s)	Effective Date
51 CL	Clerk	01/01/2002
52 CO	Contractor - No Benefits	01/01/1901
53 CST	Consultant	01/01/2006
54 CTR	Contractor	01/01/2006
55 CU	Contractual - University	01/01/1901
56 D	Doctor	01/01/1980
57 D	Doctor	01/02/1980
58 DIR	Executives	01/01/2001
59 DL	DOL Intermittent	01/01/1901
60 DU	Durational	01/01/1901

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 Reporting Table Field Name
10. Select **Search**

Results: Listing of all tables containing the field DEPTID appears

11. Select **Department** link under the table heading Reporting Field Label Name

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**

The screenshot shows a web application interface for the State of Connecticut. An 'Explorer User Prompt' dialog box is open, with the search string 'DAS' entered. The background interface displays the 'EPM Data Dictionary' for the reporting table 'CTW_ADDRESSES' and field 'DEPTID'. The field definition is 'The Department or Agency of the employee.' Below this is a table of field values with a red box highlighting the first three rows.

Field Value(s)	Status - Field Value Description(s)	Effective Date
74 DAS23000	A - Dept of Admin Services	01/01/1901
75 DAS23000	A - Dept of Admin Services	09/22/2008
76 DCC38100	A - Office of Consumer Council	01/01/1901

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**

The screenshot shows a search interface with two tabs: "Find an Existing Value" (selected) and "Add a New Value". Below the tabs is a "Search Criteria" section with three input fields:

- Reporting Table Name: begins with [dropdown]
- Reporting Table Field Name: begins with [dropdown]
- Reporting Field Label Name: contains [dropdown] Salary

Below the input fields are two checkboxes: "Correct History" and "Case Sensitive". At the bottom of the search criteria section are buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria".

The "Search Results" section shows a table with the following data:

Reporting Table Name	Reporting Table Field Name	Reporting Field Label Name
CTW HLTH SAFETY	CT 52 WK SAL AVG	52 Week Salary Average
CTW HLTH SF VW	CT 52 WK SAL AVG	52 Week Salary Average
CTW CA CNTR HDR	GM SAL DTL FLAG	Salary Detail Report
CTW EMPLOYEE	CT SALGRADE DESCR	Salary Grade Description

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

State of Connecticut

Favorites Main Menu > Core-CT EPM > Reporting Tools > Query > Query Manager

My HR Core-CT Help

Query Manager

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Query](#) | [Create New Query](#)

*Search By Query Name begins with

Search **Advanced Search**

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

CT.gov State of Connecticut


Favorites Main Menu > Core-CT EPM > Reporting Tools > Query > Query Manager

[My HR](#) [Core-CT Help](#)

Query Manager

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Query](#) | [Create New Query](#)

Query Name
 Description
 Uses Record Name
 Uses Field Name
 Access Group Name 
Folder Name
 *Query Type =
 Owner =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

[Basic Search](#)

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 Run to Excel option, select **Excel**

Results: Run time prompts appear

Search Results

*Folder View: -- All Folders --

Check All Uncheck All *Action: -- Choose -- Go

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input type="checkbox"/>	CT_CORE_HR_PDS_COMPENSATION	EE daily & biweekly pay rates	Public	HR	Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	CT_CORE_HR_POSNS_ALL_BY_DEPT	Active Positions Filled/Vacant	Public	HR	Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	CT_CORE_HR_POSN_ACTIVITY	Position Activity Query	Public	HR	Edit	HTML	Excel	XML	Schedule

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.

CT_CORE_HR_POSNS_ALL_BY_DEPT - Active Positions Filled/Vacant

Department like (%):

ID	Empl Rcd#	Eff Date	Name	Position	Location	FTE	Full/Part	Reg/Temp	Union Code	Status
----	-----------	----------	------	----------	----------	-----	-----------	----------	------------	--------

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**

State of Connecticut

Favorites | Main Menu > Core-CT EPM > Reporting Tools > Query > Query Manager

My HR | Core-CT Help

Query Manager

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Query](#) | [Create New Query](#)

Query Name begins with

Description begins with

Uses Record Name begins with

Uses Field Name begins with

Access Group Name begins with

Folder Name begins with

*Query Type =

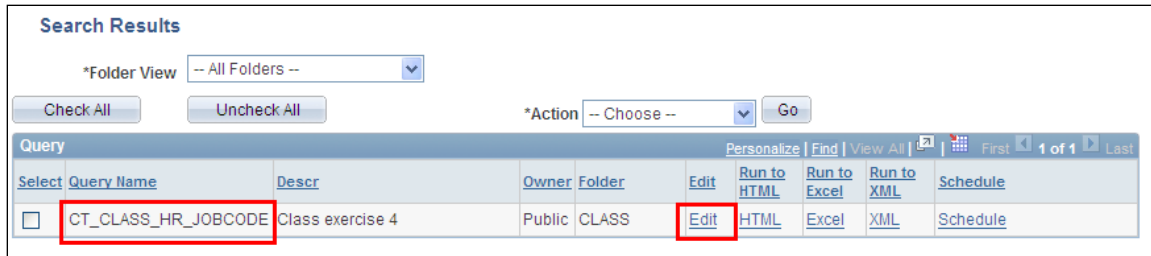
Owner =

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

[Basic Search](#)

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

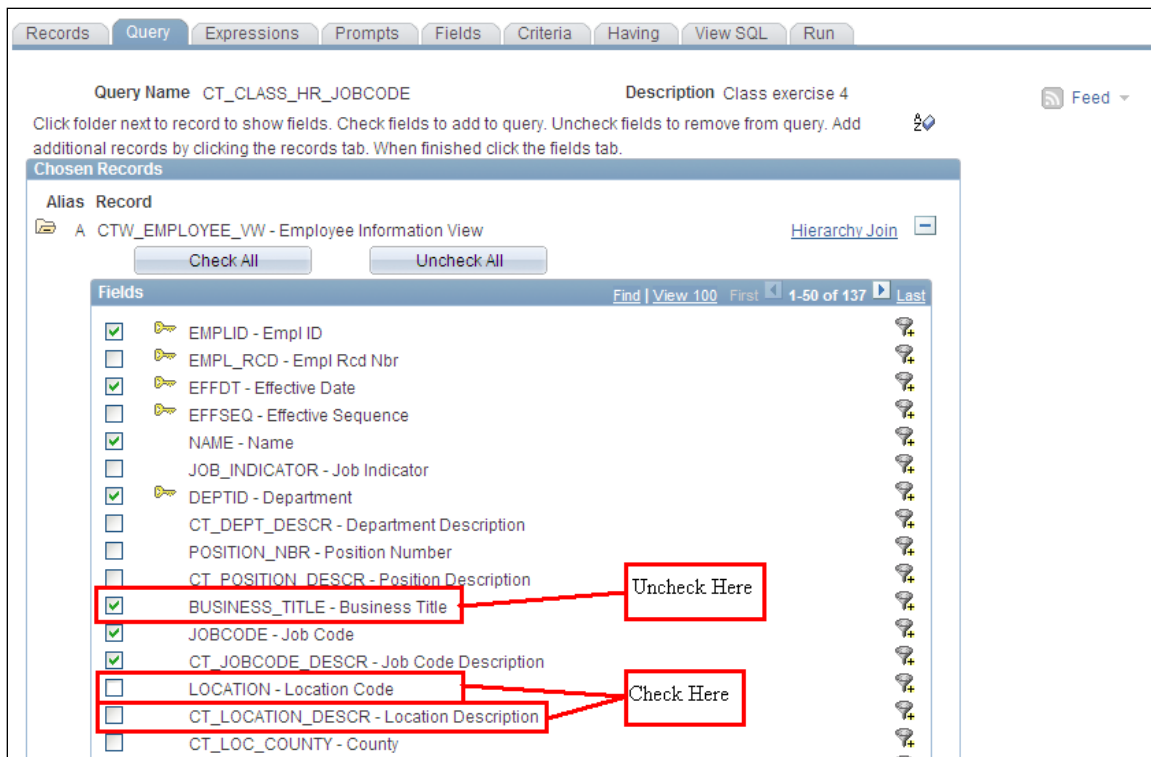
7. Locate the Fields titled, **LOCATION** and **CT_LOCATION_DESCR**
8. Check the box next to the Field names

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

Edit Criteria Properties

Choose Expression 1 Type

Field
 Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:
A.DEPTID - Department

*Condition Type: like

Choose Expression 2 Type

Constant
 Prompt

Expression 2

Define Prompt


Prompt:

OK Cancel

Results: The Edit Prompt Properties page appears

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

Edit Prompt Properties

Field Name:  DEPTID

*Type: Character

*Format: Upper

Length: 10


Decimals:

*Edit Type: No Table Edit

*Heading Type: RFT Short

Heading Text: Department (like-%)

*Unique Prompt Name: BIND1

Prompt Table: 

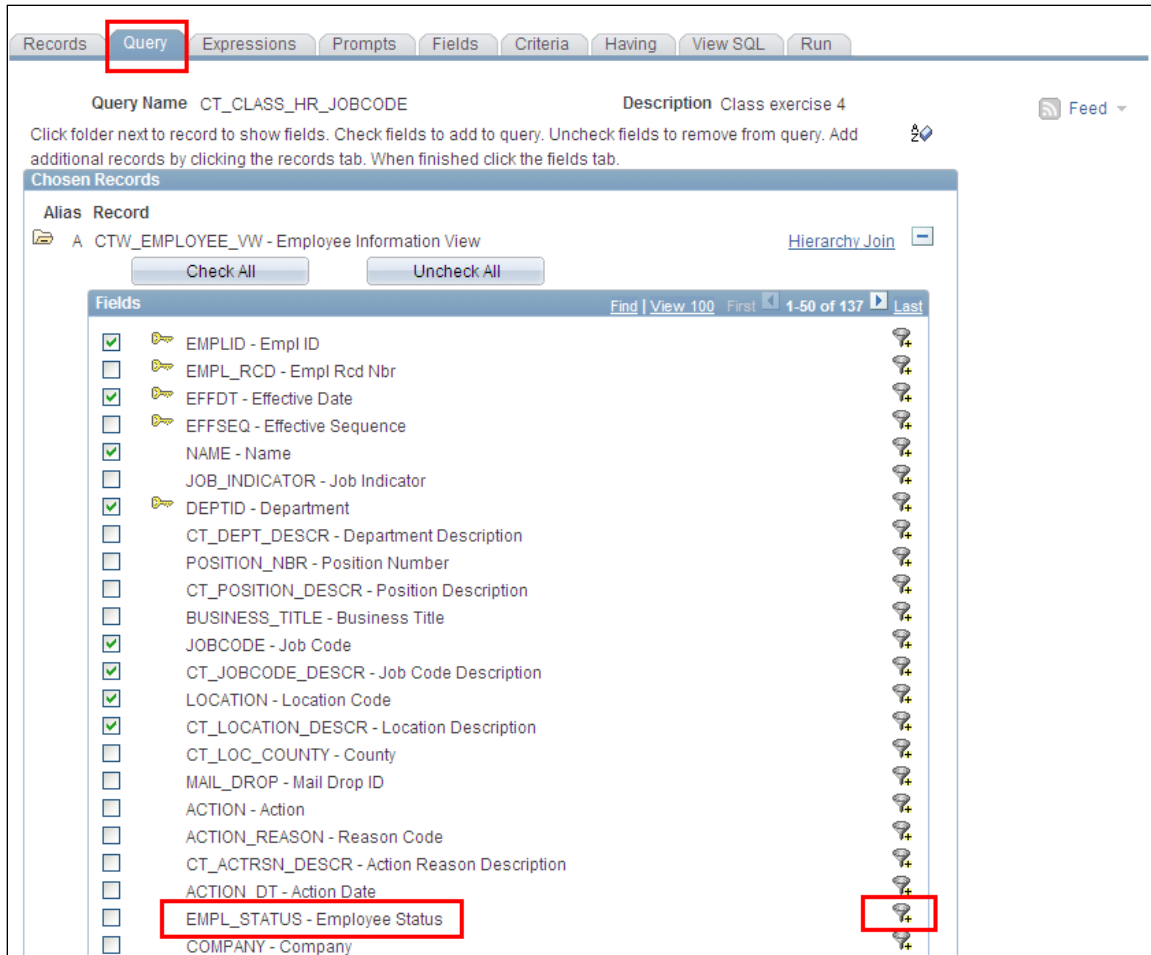
OK Cancel

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

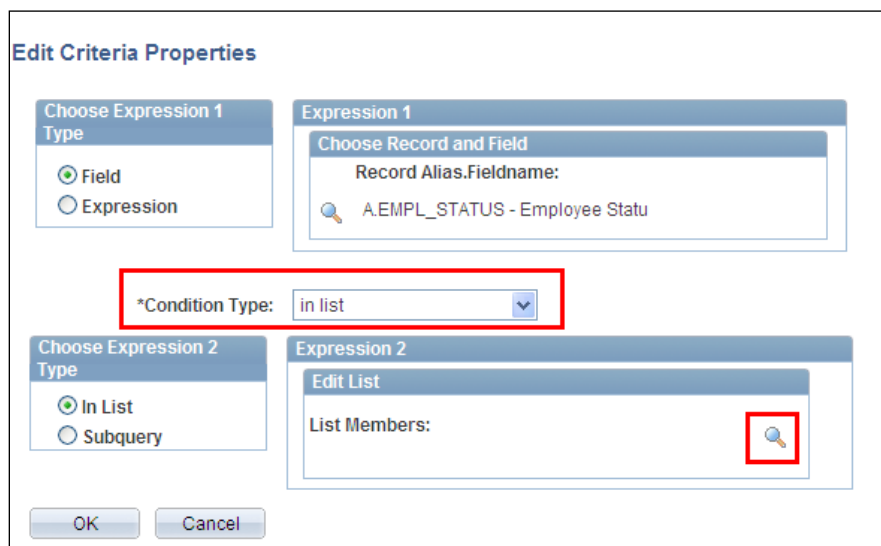
To add criteria to a reporting Field that is not displayed in the final report, you must add criteria from either the Query or Criteria tab.

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.**

Edit List

List Members		Personalize Find First 1-4 of 4 Last
<input type="checkbox"/>	A	
<input type="checkbox"/>	L	
<input type="checkbox"/>	P	
<input type="checkbox"/>	S	

Value:

Add Prompt

Values				Personalize Find View All First 1-13 of 13 Last
Field Value	Translate Long Name	Translate Short Name	Add Value	
A	Active	Active	<input type="button" value="Add Value"/>	
D	Deceased	Deceased	<input type="button" value="Add Value"/>	
L	Leave of Absence	Leave	<input type="button" value="Add Value"/>	
P	Leave With Pay	Leave W/Py	<input type="button" value="Add Value"/>	
Q	Retired With Pay	Ret w/Pay	<input type="button" value="Add Value"/>	
R	Retired	Retired	<input type="button" value="Add Value"/>	
S	Suspended	Suspended	<input type="button" value="Add Value"/>	
T	Terminated	Terminated	<input type="button" value="Add Value"/>	
U	Terminated With Pay	Term w/Pay	<input type="button" value="Add Value"/>	
V	Terminated Pension Pay Out	Term w/Pen	<input type="button" value="Add Value"/>	

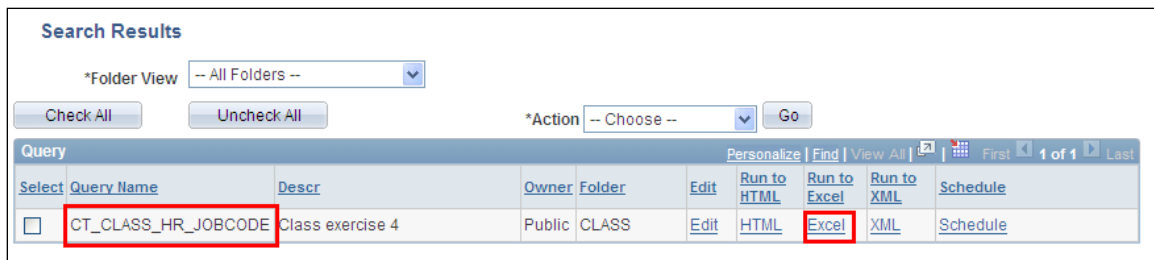
Review and Save

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.



The screenshot displays the 'Search Results' interface. At the top, there is a 'Folder View' dropdown menu set to '-- All Folders --'. Below this are 'Check All' and 'Uncheck All' buttons, and an '*Action' dropdown menu set to '-- Choose --' with a 'Go' button. The main content is a table titled 'Query' with columns: Select, Query Name, Descr, Owner, Folder, Edit, Run to HTML, Run to Excel, Run to XML, and Schedule. The first row of data has 'CT_CLASS_HR_JOBCODE' in the 'Query Name' column, 'Class exercise 4' in the 'Descr' column, 'Public' in the 'Owner' column, and 'CLASS' in the 'Folder' column. The 'Run to Excel' link in the first row is highlighted with a red box.

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input type="checkbox"/>	CT_CLASS_HR_JOBCODE	Class exercise 4	Public	CLASS	Edit	HTML	Excel	XML	Schedule

Exercise 4: Modifying an Existing Query

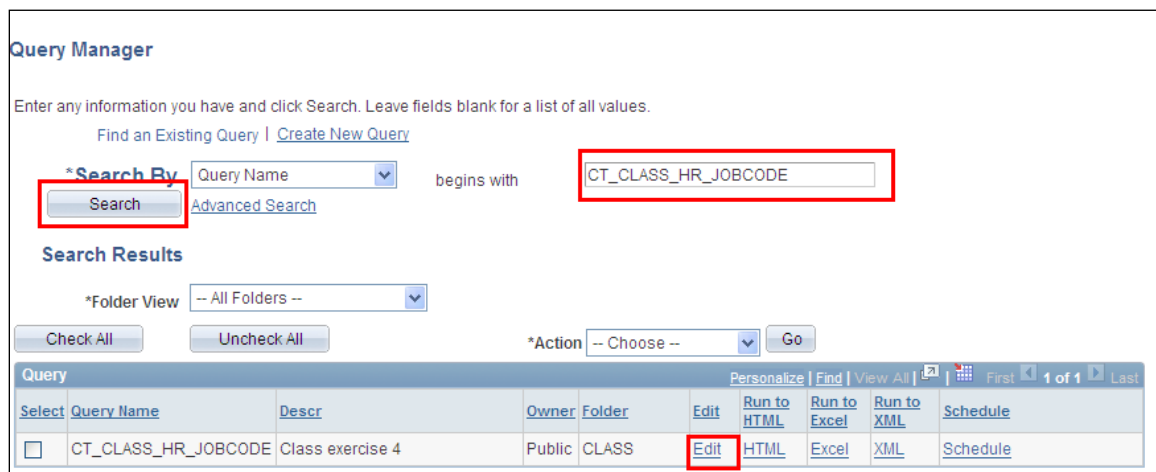
Scenario: You have been asked to modify the query you just created in Exercise three to include a prompt for Union Code as well as to reorder and sort the data fields in the final report.

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



The screenshot shows the Query Manager interface. At the top, there is a search bar with the text "Enter any information you have and click Search. Leave fields blank for a list of all values." Below this, there are links for "Find an Existing Query" and "Create New Query". The search criteria are set to "Query Name" and "begins with" with the value "CT_CLASS_HR_JOBCODE" entered. A "Search" button is highlighted with a red box. Below the search results, there is a "Folder View" dropdown set to "-- All Folders --" and buttons for "Check All", "Uncheck All", and "*Action -- Choose --" with a "Go" button. A table titled "Query" is displayed with the following columns: Select, Query Name, Descr, Owner, Folder, Edit, Run to HTML, Run to Excel, Run to XML, and Schedule. The table contains one row with the following data: [checkbox], CT_CLASS_HR_JOBCODE, Class exercise 4, Public, CLASS, Edit (highlighted with a red box), HTML, Excel, XML, and Schedule.

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

Records Query Expressions Prompts **Fields** Criteria Having View SQL Run

Query Name CT_CLASS_HR_JOBCODE Description Class exercise 4 Feed

View field properties, or use field as criteria in query statement.

Fields Personalize | Find | View All | First 1-10 of 10 Last

Col	Record.Fieldname	Format	Ord	XLAT	Aqq	Heading Text	Add Criteria	Edit	Delete
1	A.EMPLID - Empl ID	Char11				ID		Edit	[-]
2	A.EFFDT - Effective Date	Date				Eff Date		Edit	[-]
3	A.NAME - Name	Char50				Name		Edit	[-]
4	A.DEPTID - Department	Char10				DeptID		Edit	[-]
5	A.JOBCODE - Job Code	Char6				Job Code		Edit	[-]
6	A.ACT_JOBCODE_DESCR - Job Code Description	Char30				Job Cd Descr		Edit	[-]
7	A.ACT_PAYGROUP_DESCR - Pay Group Description	Char30				PayGroup Descr		Edit	[-]
8	A.LOCATION - Location Code	Char10				Location		Edit	[-]
9	A.ACT_LOCATION_DESCR - Location Description	Char30				Location Descr		Edit	[-]
10	A.UNION_CD - Union Code	Char3				Union Code		Edit	[-]

Save Save As New Query Preferences Properties Publish as Feed New Union Return To Search

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 leaving unchecked the descending option. Then sort employees by their job code, enter the numeral 2 next to the **JOB** 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 [Print] First 1-10 of 10 Last						
New Column	Column	Record.Fieldname	Order By	Descending	New Order By	
2	1	A.EMPLID - Empl ID		<input type="checkbox"/>		
	2	A.EFFDT - Effective Date		<input type="checkbox"/>		
3	3	A.NAME - Name		<input type="checkbox"/>		1
1	4	A.DEPTID - Department		<input type="checkbox"/>		
	5	A.JOBCODE - Job Code		<input type="checkbox"/>		2
	6	A.ACT_JOBCODE_DESCR - Job Code Description		<input type="checkbox"/>		
	7	A.ACT_PAYGROUP_DESCR - Pay Group Description		<input type="checkbox"/>		
	8	A.LOCATION - Location Code		<input type="checkbox"/>		
	9	A.ACT_LOCATION_DESCR - Location Description		<input type="checkbox"/>		
	10	A.UNION_CD - Union Code		<input type="checkbox"/>		

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

State of Connecticut

Favorites Main Menu > Core-CT EPM > Reporting Tools > Query > Query Manager

My HR Core-CT Help

Query Manager

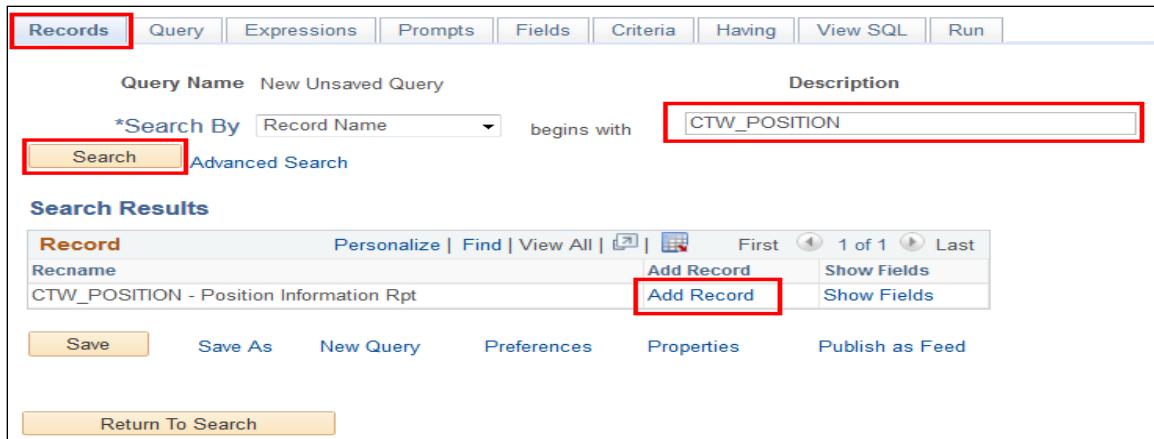
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Query | **Create New Query**

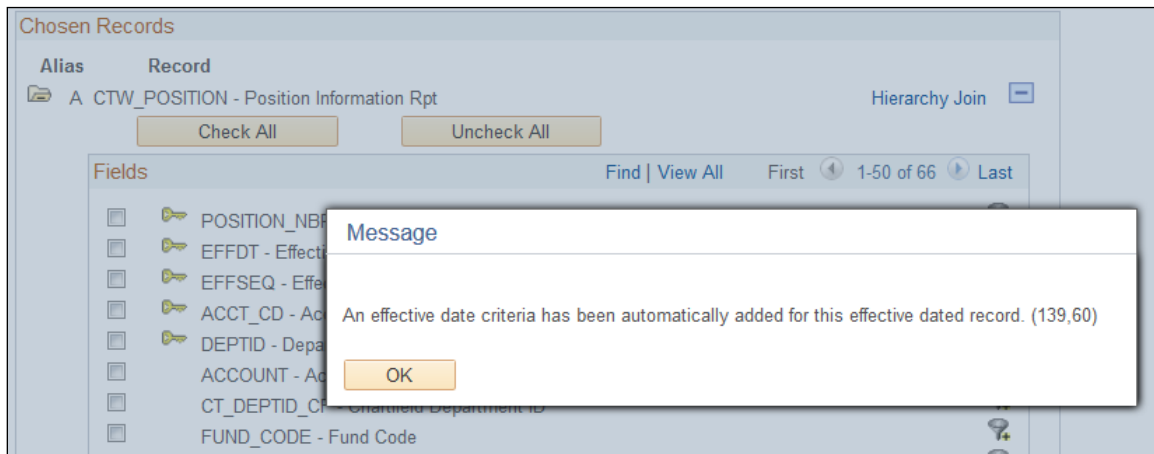
*Search By Query Name begins with

Search Advanced Search

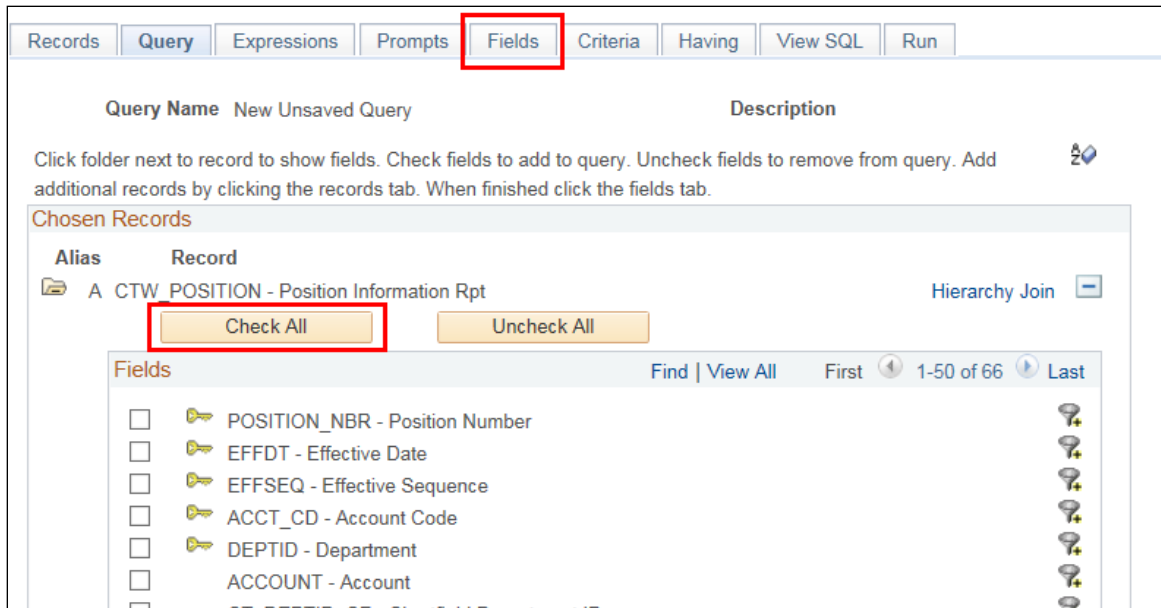
2. Enter **CTW_POSITION** in the Search By>Record Name search field
3. Select **Search**
4. On the search results page, select **Add Record** which is located right of the record name, **CTW_POSITION**



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.



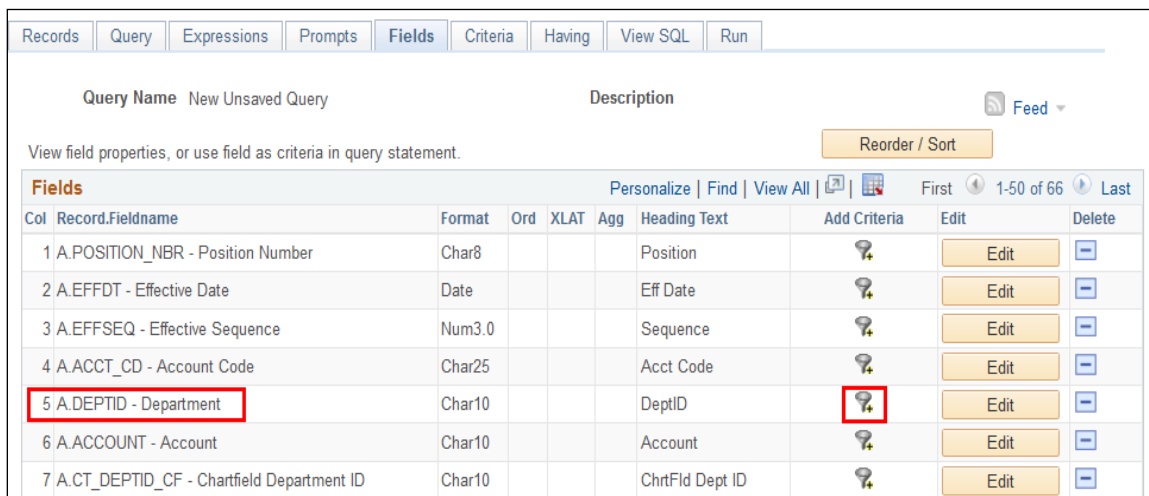
5. Select **Ok**. You are now on the Query tab.
6. Within the listing of fields, select the **CHECK ALL** button and ensure that all fields have been checked.
7. Locate and select the **Fields** tab located at the top of the page



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.

The screenshot shows the 'Edit Criteria Properties' dialog box. It is divided into two main sections: 'Expression 1' and 'Expression 2'.
- **Expression 1:** The 'Choose Expression 1 Type' section has 'Field' selected. The 'Expression 1' section shows 'Record Alias.Fieldname: A.DEPTID - Department'.
- **Expression 2:** The 'Choose Expression 2 Type' section has 'Constant' selected. The 'Expression 2' section shows 'Define Constant' with 'Constant: DAS%'.
- A dropdown menu for '*Condition Type:' is set to 'like'.
- At the bottom, there are 'OK' and 'Cancel' buttons.

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

Edit Criteria Properties

Choose Expression 1 Type

Field

Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname

A.POSN_STATUS - Position Statu

***Condition Type** in list

Choose Expression 2 Type

In List

Subquery

Expression 2

Edit List

List Members

OK Cancel

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

Edit List

No values have been added yet.

Value:

Add Prompt

Field Value	Translate Long Name	Translate Short Name	Add Value
A	Approved	Approved	<input type="button" value="Add Value"/>
P	Proposed	Proposed	<input type="button" value="Add Value"/>
R	Frozen	Frozen	<input type="button" value="Add Value"/>
D	Rejected	Rejected	<input type="button" value="Add Value"/>

OK Cancel

- 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

- locate the Field titled, **EFF_STATUS**, on the Fields tab
- 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

Edit Criteria Properties

Choose Expression 1 Type

Field
 Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname
A.EFF_STATUS - Status as of Ef

*Condition Type equal to

Choose Expression 2 Type

Field
 Expression
 Constant
 Prompt
 Subquery

Expression 2

Define Constant

Constant

OK Cancel

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

Select A Constant

Personalize | Find | View All | First 1-2 of 2 Last

Field Value	Translate Long Name	Translate Short Name	Select Constant
I	Inactive	Inactive	Select Constant
A	Active	Active	Select Constant

Cancel

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.

The screenshot shows the Query Manager interface with the 'Criteria' tab selected. The interface includes a navigation bar at the top with tabs for Records, Query, Expressions, Prompts, Fields, Criteria, Having, View SQL, and Run. Below the navigation bar, there are fields for 'Query Name' (New Unsaved Query) and 'Description'. A 'Feed' icon is visible on the right. Below these fields are three buttons: 'Add Criteria', 'Group Criteria', and 'Reorder Criteria'. The main area is a table with columns: Logical, Expression1, Condition Type, Expression 2, Edit, and Delete. The table contains four rows of criteria. The 'Save As' button is highlighted with a red box. Other buttons at the bottom include 'Save', 'New Query', 'Preferences', 'Properties', 'Publish as Feed', and 'New Union'. A 'Return To Search' button is at the bottom left.

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.EFFDT - Effective Date	Eff Date <=	Current Date (EffSeq = Last)	Edit	-
AND	A.DEPTID - Department	like	DAS%	Edit	-
AND	A.POSN_STATUS - Position Status	in list	('A','P','D')	Edit	-
AND	A.EFF_STATUS - Status as of Effective Date	equal to	A	Edit	-

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)**.

Records | Query | Expressions | Prompts | Fields | **Criteria** | Having | View SQL | Run

Query Name: New Unsaved Query Description: Feed

Add Criteria Group Criteria Reorder Criteria

Criteria					
Logical	Expression1	Condition Type	Expression 2	Edit	Delete
	A.EFFDT - Effective Date	Eff Date <=	Current Date (EffSeq = Last)	Edit	<input type="checkbox"/>
AND	A.DEPTID - Department	like	DAS%	Edit	<input type="checkbox"/>

Save Save As New Query Preferences Properties Publish as Feed New Union

Return To Search

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**.

Select join type and then record to join with CTW_EMPLOYEE_VW - Employee Information View.

Join Type

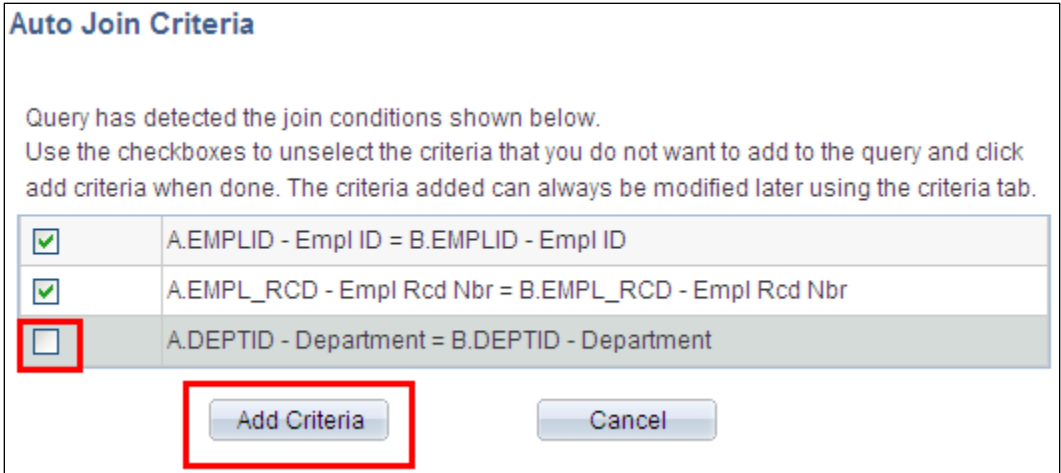
- Join to filter and get additional fields (Standard Join)
- Join to get additional fields only (Left outer join)

Join Record Personalize | Find | First 1 of 1 Last

A = CTW_HLTH_SF_VW - Health/Safety View

Cancel

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.

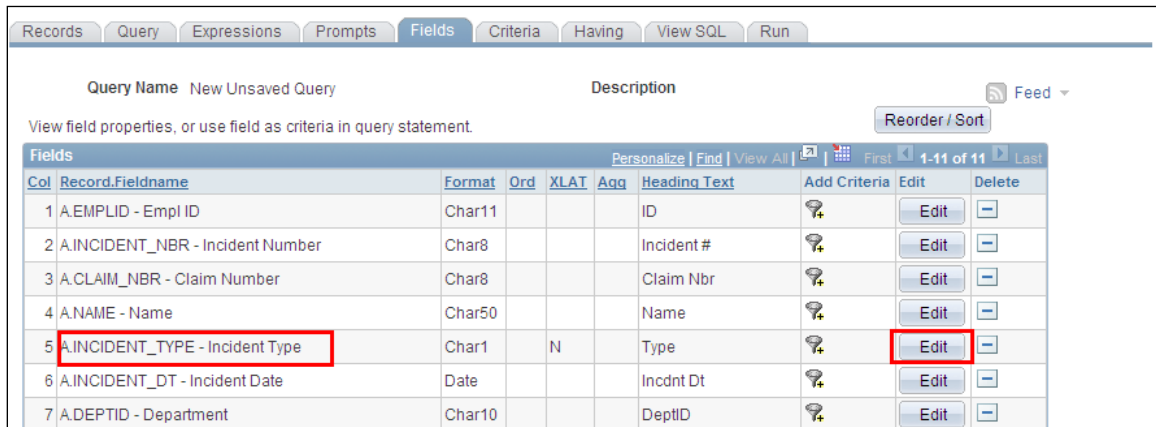


13. Select Add Criteria button to accept modified default field joins. Note: A pop-up notification will appear stating that the **CTW_EMPLOYEE_VW** table is an effective dated table. Select okay to acknowledge.
14. Within the listing of fields from the record, **CTW_EMPLOYEE_VW**, select the following 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**

Edit Field Properties

Field Name: A.INCIDENT_TYPE - Incident Type

Heading

No Heading RFT Short
 Text RFT Long

Heading Text:

*Unique Field Name:

Aggregate

None
 Sum
 Count
 Min
 Max
 Average

Translate Value

None Short Long

Effective Date for Short/Long

Current Date
 Field
 Expression

[Add Prompt](#) [Add Field](#)

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_ADDRESSES_VW**.

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**

The diagram consists of two side-by-side table structures. The left table has columns A and N, and rows 1 and 3. Row 1, column N contains 'CTW_EMPLOYEE or CTW_EMPLOYEE_VW'. Row 3, column A contains 'CTW_ADDRESSES or CTW_ADDRESSES_VW'. A red arrow points from the N cell to the A cell, with both cells circled in red. The right table has columns A and C, and rows 1 and 14. Row 1, column C contains 'CTW_ADDRESSES or CTW_ADDRESSES_VW'. Row 14, column A contains 'CTW_EMPLOYEE or CTW_EMPLOYEE_VW'. A green arrow points from the C cell to the A cell, with both cells circled in green.

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_ADDRESSES** 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_ADDRESSES**.
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**

Criteria
<input checked="" type="checkbox"/> A.EMPLID - Empl ID = B.EMPLID - Empl ID
<input checked="" type="checkbox"/> A.EMPL_RCD - Empl Rcd Nbr = B.EMPL_RCD - Empl Rcd Nbr
<input checked="" type="checkbox"/> A.DEPTID - Department = B.DEPTID - Department

14. Within the listing of fields from the record, **CTW_ADDRESSES**, 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.

Edit Criteria Properties

Choose Expression 1 Type

Field
 Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname
A.EMPL_STATUS - Employee Statu

*Condition Type in list

Choose Expression 2 Type

In List
 Subquery

Expression 2

Edit List

List Members (A, L, P, S)

OK Cancel

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.**

Edit Criteria Properties

Choose Expression 1 Type

Field
 Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:

A.DEPTID - Department

*Condition Type: like

Choose Expression 2 Type

Constant
 Prompt

Expression 2


Define Prompt

Prompt:

OK Cancel

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

Edit Prompt Properties

Field Name:  DEPTID

*Type: Character

*Format: Upper

Length: 10


Decimals:

*Edit Type: No Table Edit

*Heading Type: RFT Short

Heading Text: Department (like-%)

*Unique Prompt Name: BIND1

Prompt Table: 

OK Cancel

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.**

Edit Criteria Properties

Choose Expression 1 Type

Field
 Expression

Expression 1

Choose Record and Field

Record Alias.FieldName
 B.ADDRESS_TYPE - Address Type

***Condition Type** equal to

Choose Expression 2 Type

Field
 Expression
 Constant
 Prompt
 Subquery

Expression 2

Define Prompt

Prompt **New Prompt** Edit Prompt

OK Cancel

34. Locate the Heading Text field and enter **Enter Address Type =**
35. Select **Ok** twice

Edit Prompt Properties

Field Name
 ADDRESS_TYPE

***Heading Type**
RFT Short

***Type**
Character

Heading Text
Enter Address Type =

***Format**
Upper

***Unique Prompt Name**
BIND2

Length 4
Decimals

***Edit Type**
No Table Edit

Prompt Table

Default Value

OK Cancel

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.

Auto Join Criteria

Query has detected the join conditions shown below.
Use the checkboxes to unselect the criteria that you do not want to add to the query and click add criteria when done. The criteria added can always be modified later using the criteria tab.

<input checked="" type="checkbox"/>	A.POSITION_NBR - Position Number = B.POSITION_NBR - Position Number
<input type="checkbox"/>	A.EFFSEQ - Effective Sequence = B.EFFSEQ - Effective Sequence
<input type="checkbox"/>	A.DEPTID - Department = B.DEPTID - Department

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.

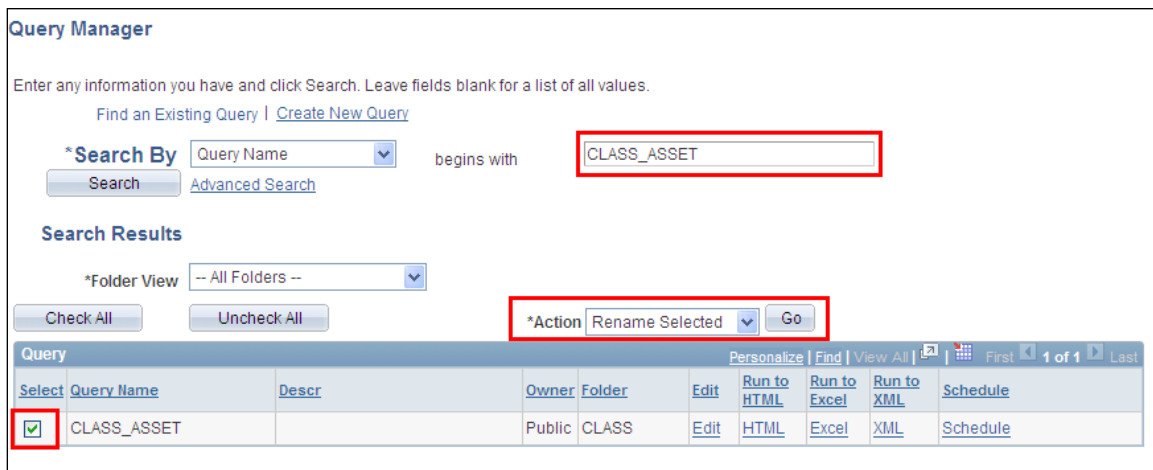
Exercise 11: Query Maintenance

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.



The screenshot shows the Query Manager interface. At the top, there is a search bar with the text "Enter any information you have and click Search. Leave fields blank for a list of all values." Below this, there are links for "Find an Existing Query" and "Create New Query". The search criteria are set to "Query Name" and "begins with", with "CLASS_ASSET" entered in the search field. Below the search bar, there are "Search" and "Advanced Search" buttons. The "Search Results" section shows a "Folder View" dropdown set to "-- All Folders --". There are "Check All" and "Uncheck All" buttons. The "Action" dropdown menu is set to "Rename Selected", and the "Go" button is highlighted. Below the search results, there is a table with the following data:

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input checked="" type="checkbox"/>	CLASS_ASSET		Public	CLASS	Edit	HTML	Excel	XML	Schedule

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.