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## Creating A New Query

Last Updated: September 2015

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Creating a new query enables you to choose a record and data fields as well as criteria so that the query returns the results that are desired. If a query returns no data or partial data, you must verify that data exists and reevaluate the query design to ensure proper fields, parameters and logical conditions are used.

The steps to create a new query include:

- [selecting the record on which to base the query](#)
- [adding fields to the query content](#)
- [specifying selection criteria](#)
- [editing prompt properties](#)
- [organizing the query output](#)
- [saving and running the query](#)

In following example, John Smith will create a biweekly payroll report on pay end date 8/6/2015 that includes employee's ID and record number, prompted by Department ID.

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### *Selecting the Record:*

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1. Enter the description of record name (for example **CTW\_DET\_PAYROLL**) in the Search By > Record Name
2. Select **Search**
3. Under the search results, select **Add Record** which is located right of the respective record name

The screenshot shows a software interface with a search bar. The search criteria is set to "Record Name" and the search text is "CTW\_DET\_PAYROLL". The "Search" button is circled in red. Below the search bar, the search results are displayed in a table. The table has a header row with "Record" and "Personalize | Find | View All | First | 1 of 1 | Last". The table contains one row with the record name "CTW\_DET\_PAYROLL - Detailed Payroll Rpt" and two buttons: "Add Record" (circled in red) and "Show Fields".

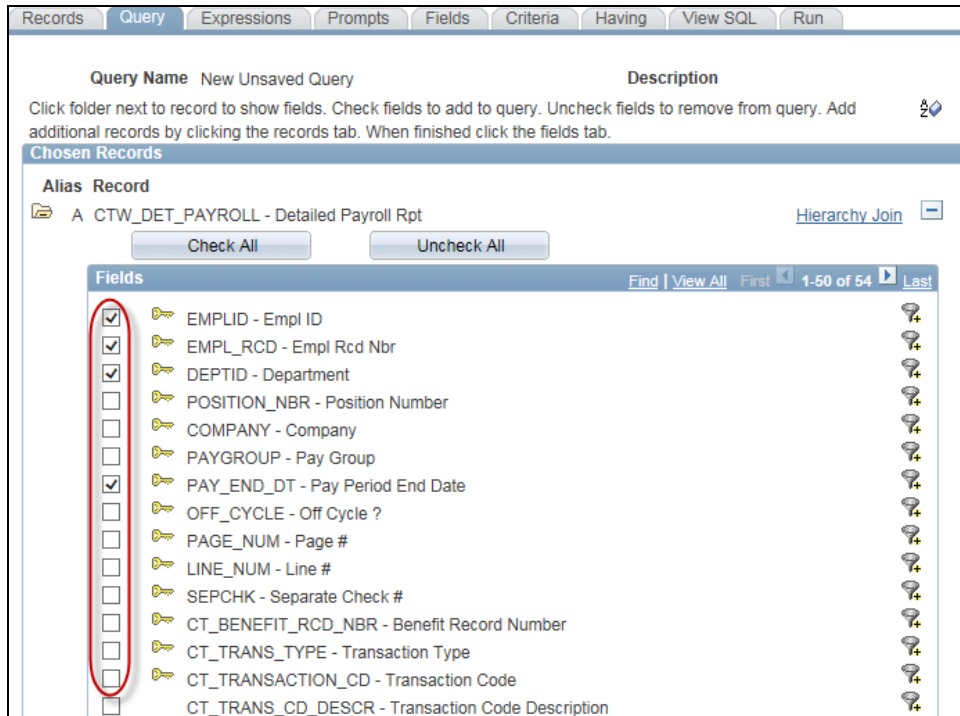
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## Adding Fields:

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4. On the **Query** tab, within the listing of fields, select the fields that you wish to display on the report. In this example, pick the fields: **EMPLID**, **EMPL\_RCD**, **DEPTID**, and **PAY\_END\_DT**



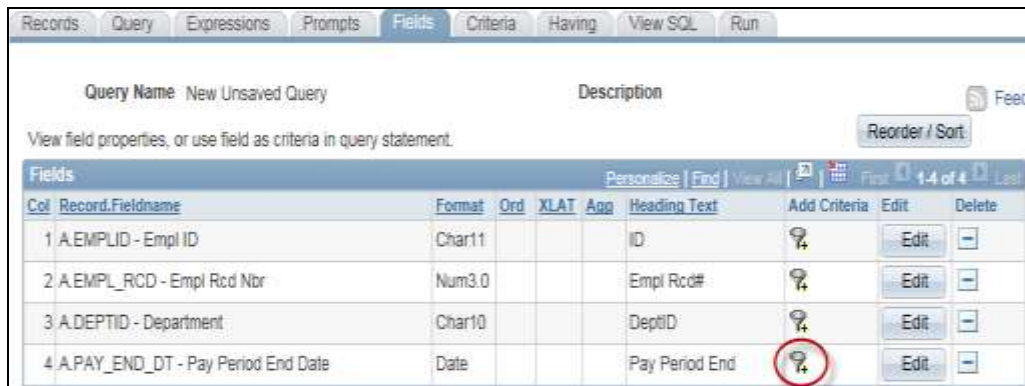
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## Specifying Selection Criteria:

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5. On the **Fields** tab, select the **Add Criteria** icon  located to the right of the Field name: **PAY\_END\_DT**



*Note: Add Criteria icon  can also be located on the Query tab*

6. On the **Edit Criteria Properties** screen, select the logical condition “**equal to**” from the **Condition Type** drop-down box (See link below for available condition types: [http://www.core-ct.state.ct.us/epm/pdf/condition\\_type.pdf](http://www.core-ct.state.ct.us/epm/pdf/condition_type.pdf))
7. Within the **Choose Expression 2 Type** group box, select the comparison criteria: **Constant**
8. Within the **Expression 2, Define Constant** box, enter the comparison value(s): **8/6/2015**
9. Click **OK**

The screenshot shows the 'Edit Criteria Properties' dialog box. It is divided into several sections:

- Choose Expression 1 Type:** 'Field' is selected.
- Expression 1:** 'Choose Record and Field' section shows 'Record Alias.Fieldname:' as 'A.PAY\_END\_DT - Pay Period End'.
- \*Condition Type:** A dropdown menu is set to 'equal to'.
- Choose Expression 2 Type:** 'Constant' is selected.
- Expression 2:** 'Define Constant' section shows '\*Date:' as '08/06/2015'.

10. On the Criteria tab, **PAY\_END\_DT** is equal to **8/6/2015**.

Logical	Expression1	Condition Type	Expression 2	Edit	Delete
<input checked="" type="checkbox"/>	A.PAY_END_DT - Pay Period End Date	equal to	2015-08-06	Edit	-


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## Editing Prompt Properties:

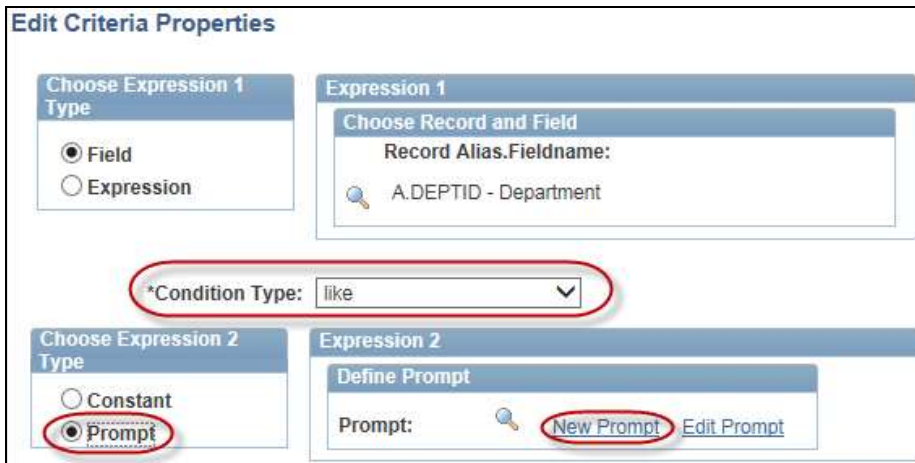
### To add a prompt

11. On the Fields tab, select the **Add Criteria** icon  located to the right of the Field name: **DEPTID**



Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.EMPLID - Empl ID	Char11				ID		Edit	[-]
2	A.EMPL_RCD - Empl Rcd Nbr	Num3.0				Empl Rcd#		Edit	[-]
3	A.DEPTID - Department	Char10				DeptID		Edit	[-]
4	A.PAY_END_DT - Pay Period End Date	Date				Pay Period End		Edit	[-]

12. On the **Edit Criteria Properties** screen, select the logical condition “*like*” from the **Condition Type** drop-down list
13. Within the **Choose Expression 2 Type** group box, select the comparison criteria: *Prompt*
14. Within the **Express 2, Define Prompt** box, select the comparison value(s): *New Prompt*



**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:  **New Prompt** Edit Prompt

## To edit a prompt

15. On the **Edit Prompt Properties** screen, enter the **Heading Text** as “*Department ID Like (%)*”
16. Select *No Table Edit* from **Edit Type** drop-down list
17. Click **OK** to return to the Edit Criteria Properties screen

**Edit Prompt Properties**

Field Name: DEPTID

\*Heading Type: RFT Short

\*Type: Character

Heading Text: Department ID like (%)

\*Format: Upper

\*Unique Prompt Name: BIND1

Length: 10

Decimals: 0

\*Edit Type: No Table Edit

Prompt Table:

18. Click **OK**
19. On the **Prompts** tab, **DEPTID** will be prompted as *Department ID Like (%)*.

Query Name	Description
New Unsaved Query	

Add Prompt

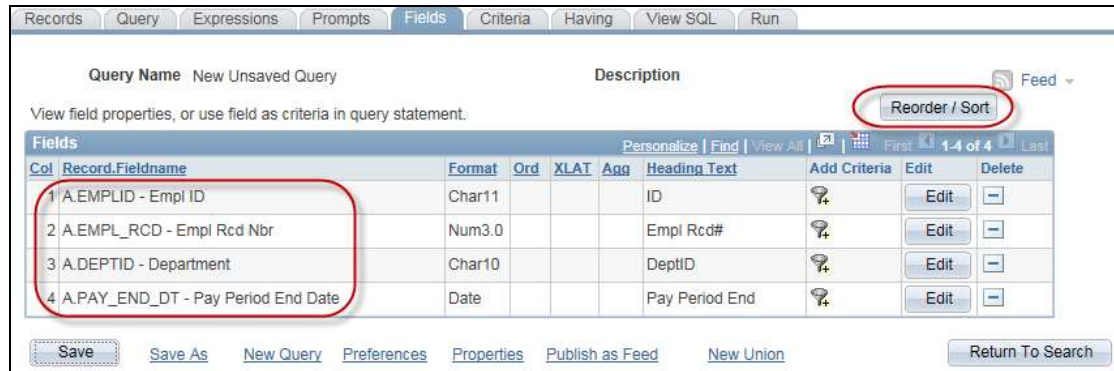
Prompt	Edit	Delete
:1 = DEPTID - Department ID like (%)	Edit	-

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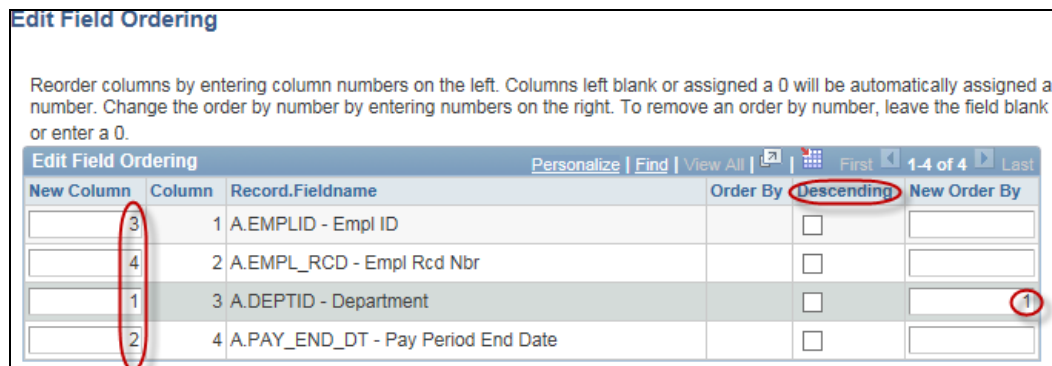
## Organizing Query Output:

### To reorder and sort columns

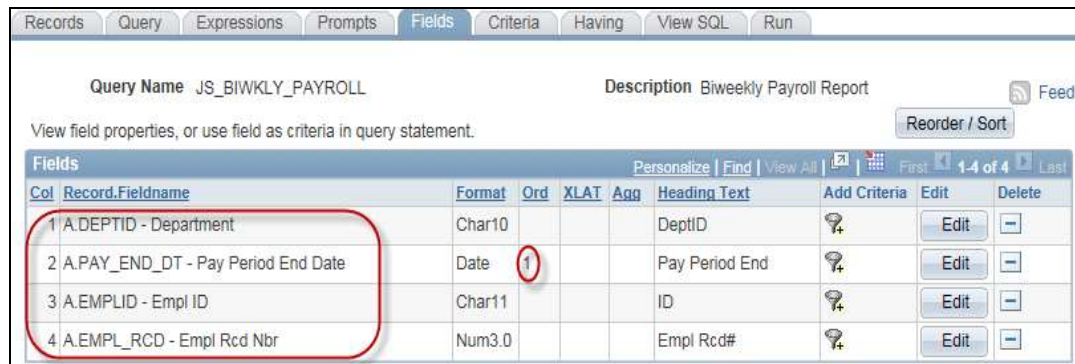
20. On the Fields tab, the original column order is **EMPLID**, **EMPL\_RCD**, **DEPTID**, and **PAY\_END\_DT**. If wish to reorder/sort the columns, click the **Reorder/Sort** button located on the upper right hand corner.



21. To reorder the column(s), enter the number(s) under the **New Column**. To change the sort order, enter the number(s) under the **New Order By**. To sort the data in descending order, select the box under the **Descending**.
22. Click **OK**



23. On the **Fields** tab, the new column order is **DEPTID**, **PAY\_END\_DT**, **EMPLID**, and **EMPL\_RCD**, and the results will sort by **DEPTID**.



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## *Saving and Running the Query:*

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### To save the Query

24. Select **Save As** at the bottom of the query page to save your query.



25. Name your *private* query using standard naming conventions, *USER\_INITIALS\_MODULE\_FUNCTION\_NAME*, in this example **JS\_BIWKLY\_PAYROLL**.

Define the description of your private query, i.e., *biweekly payroll report*.

Choose a folder to save in, if appropriate, i.e., *payroll queries*.

Save the query as **PRIVATE** from the **Owner** drop-down list.

Provide additional query definition as necessary.

The screenshot shows the 'Query Properties' dialog box. The fields are: \*Query: JS\_BIWKLY\_PAYROLL, Description: Biweekly Payroll Report, Folder: PAYROLL QUERIES, \*Query Type: User, \*Owner: Private, and a checkbox for Distinct. The 'Query Definition' field contains the text: 'Run this report to get biweekly payroll report on 8/7/2015, prompted by Dept ID.' The fields for \*Query, Description, Folder, \*Owner, and the Query Definition are highlighted with red circles.

26. Click **OK**

### To test and review the Query

27. Return to **Query Manager** and search for your saved private query

28. Select **Run to Excel** located to the right of your saved query name

29. Review and evaluate the results in Excel worksheet

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