

INTRODUCTION

Scheduling queries in EPM can provide a number of benefits:

1. **Enables Queries to Run on Recurring Basis** – queries can be scheduled to run daily, weekly, or monthly without a user manually re-running the query.
2. **Maximum Result Size** – queries that produce large result sets should be scheduled via the process scheduler (maximum result size of 100,000 rows);
3. **Distribution of Results to any EPM User** – scheduled queries can be distributed to any number of users by User ID.

When should a query be scheduled?

1. When a query is manually run on a recurring basis;
2. When a query returns the error 'Query Result Set Too Large'.
3. When a query runs longer than 10 minutes in Query Manager

Queries can be scheduled in Core-CT in two ways:

1. Core-CT EPM > Reporting Tools > Query > Schedule Query
2. Core-CT EPM > Reporting Tools > Query > Query Manager

The following four (4) Sections explain what you will learn from the remainder of this job aid:

Section A - Outlines the steps to schedule and distribute a query via Query Manager.

Section B - Outlines the steps to schedule, distribute and set a recurrence via Schedule Query.

Section C - Outlines the steps to view the report once it has been scheduled.

Section D – Outlines the steps to cancel or delete a scheduled query that is no longer needed..

A. Scheduling Queries via Query Manager

1. Navigate to the Schedule Query Page via [Core-CT EPM > Reporting Tools > Query > Query Manager](#).
2. On Query Manager page, search for a query, then click the [Schedule](#) hyperlink

Query									
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input type="checkbox"/>	CT_CORE_AP_TELECM_AFTER_7_2011	Telecomm Expenditures	Public	AP	Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	CT_CORE_AP_TELECM_PRIOR_7_2011	Telecomm Expenditures	Public	AP	Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	CT_CORE_AR_DEPT_DPOSIT_IDS	Deposit Ids by Fund SID, FY	Public	AR	Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	CT_CORE_AR_DIR_JRNL_BDGT_ERROR	Direct Journals in Bdgt Error	Public	AR	Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	CT_CORE_AR_DRCT_JRNL_POST_DT	Audit Post Dt vs Acct Dt	Public	AR	Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	CT_CORE_AR_EXP_ITM_IN_BUD_FUND	Open Itms budgeted Funds	Public	AR	Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	CT_CORE_AR_INCOMPLETE_DEPOSITS	AR Deposits Not Posted	Public	AR	Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	CT_CORE_AR_REFUND_EXP	AR Distrib for 50000 Acct Only	Public	AR	Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	CT_CORE_BI_SUM_PC_DATA	PC detail by invoice	Public	PC	Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	CT_CORE_BN_LIFE_AUDIT	Old/New life benefit plans	Public	BN	Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	CT_CORE_BUDGET_STATUS_REPORT	GLS8020 (Budget Status)	Public	GL	Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	CT_CORE_CAPITAL_ASSET_EXPENDI	Capital Asset Expenditures	Public	AP	Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	CT_CORE_CATALOG_ITMS_BY_CNTRCT	Catalog Items by contract	Public	REQ	Edit	HTML	Excel	XML	Schedule

3. On the [Scheduled Query](#) page, the selected query is displayed. Enter a [Run Control ID](#). (NOTE: Recommendation is to use a “smart” Run Control ID name that contains information such as the query name, agency name, parameters entered, and/or scheduled time.) Click the [Add](#) button.

Scheduled Query

Find an Existing Value
Add a New Value

Private Query:

Query Name:

Run Control ID:

- The [Schedule Query](#) page is displayed. Enter a [Description](#). (NOTE: Recommendation is to use the same name as the Run Control ID. This [Description](#) shows up in [My Reports](#) or [Report Manager](#) when the results are distributed to the user.) If the query contains prompts, review the prompt values and make any updates directly on this page or use the [Update Parameters](#) hyperlink to change the prompt values. Once complete, click the [OK](#) button.

Schedule Query

Run Control ID: CT_HR_WORKFORCE_ANALYSIS [Report Manager](#) [Process Monitor](#)

Query Name:

*Description:

- (Optional) Click on the [Distribution](#) hyperlink on the [Process Scheduler Request](#) page.

Process Scheduler Request

User ID COREGermainJ Run Control ID CT_HR_WORKFORCE_ANALYSIS



Server Name Run Date

Recurrence Run Time

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web	XLS	<input type="button" value="Distribution"/>

6. Add any additional Users by clicking the plus  icon and selecting **ID Type** (User) and **Distribution ID** (User ID of User who is to receive the results). To remove Users from the distribution, click on the minus  icon. Click the **OK** button when finished.













Distribution Detail

Process Name PSQUERY
Process Type Application Engine
Folder Name
Retention Days


Email Only

Email Subject Email With Log: Email Web Report:
Message Text
Email Address List

Distribute To

*ID Type	*Distribution ID		
User	COREGermainJ		 
User	MYABROSKY		 
User	MMALCOLM		 
User	TKENNEY		 

NOTE the following:

- Results can be distributed based on User or Role. However, the recommendation is to distribute by User ID because almost all Roles (e.g., CT REQUESTER, CT GL APPROVER) are shared statewide. No agency-specific Roles have been created for the purpose of scheduling queries;
 - To find the correct User ID for the Distribution ID field, use the lookup  icon or work with the Agency Security Liaison to find out the appropriate User ID(s).
7. Once all of the appropriate data has been entered on the **Distribution Detail** page, click on the **OK** button, which brings you back to the **Process Scheduler Request** page, then click **OK**.
8. See Section C for steps to view query results.

B. Scheduling A Recurring Query via Schedule Query

1. Navigate to the Schedule Query Page via [Core-CT EPM > Reporting Tools > Query > Schedule Query](#).
2. On the [Schedule Query](#) search page, click on the [Add a New Value](#) tab and enter a [Run Control ID](#). (NOTE: Recommendation is to use a Run Control ID name that represents the query and scheduled time.) Click the [Add](#) button.

Schedule Query

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID:

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

3. The [Schedule Query](#) page is displayed with the [Run Control ID](#) just entered. Click the [Search](#) button to find a query.

Schedule Query

Run Control ID: CT_HR_WORKFORCE_ANALYSIS_M [Report Manager](#) [Process Monitor](#) [Run](#)

Query Name: [Search](#)

*Description:

[Save](#) [Add](#) [Update/Display](#)

4. The [Scheduled Query Search Page](#) is displayed. Search for the desired query then select the query by clicking on the hyperlink for that query. Click the [Return](#) button if you want to return to the [Schedule Query](#) page without selecting a query.

Scheduled Query Search Page

*Query Type:

Query:

Query		
CT_HR_WORKFORCE_ANALYSIS	Workforce Analysis	Private
CT_HR_WFP_AGENCY_ROSTER	WFP data + sick hrs, EE_TBL	Public
CT_HR_WFP_DSS_LOC_ROSTER	Excl salary. Bill Revill	Public
CT_HR_WFP_POSITION_SUMMARY	WFP pgm for vacancies/turnover	Public
CT_HR_WFP_POS_SUM_DSS_LOC	Vac/Turnover , Bill Revill	Public

5. (Query Dependent) If the query contains prompts, requiring you to enter parameter values, the [Query](#) page will be displayed where you need to enter the appropriate information. Click the [OK](#) button when finished to return to the [Schedule Query](#) page. If the query does not contain prompts, you are returned directly to the [Schedule Query](#) page.

CT_HR_WORKFORCE_ANALYSIS

DEPTID:

6. The [Schedule Query](#) page is displayed with [Query Name](#), [Description](#), [Prompt Name](#), and [Prompt Value](#) populated. If the query contains prompts, review the prompt values and use the [Update Parameters](#) hyperlink to change the prompt values. Update the [Description](#) as necessary. After confirming the information on the page, click the [Run](#) button.

Schedule Query

Run Control ID: CT_HR_WKFCE_ANALYSIS Report Manager Process Monitor [Run](#)

Query Name: [Search](#)

*Description:

[Update Parameters](#)

Prompt Name	Value
DEPTID	<input type="text" value="DAS%"/>

[Save](#) [Add](#) [Update/Display](#)

7. The [Process Scheduler Request](#) page is displayed. Enter [Server Name](#) (**NOTE: Always choose PSUNX**). Do not change the default value for [Type](#) (Web); but you may change the [Format](#) fields, HTM, PDF, TXT, XFORM, XLS, XML, or XMLP. If the scheduled query needs to run on a regular basis, enter a [Recurrence](#). If the scheduled query will be run one-time only, do not enter a [Recurrence](#). An example would be an online query that fails because it returns too many rows. The user could schedule the query to run on the process scheduler servers which allows a result size of 100,000 rows. Recurrence choices are:

- BI-WEEKLY MONDAY
- Daily Purge
- Daily-5pm
- Daily-Noon
- M-F at 5PM
- M-F at noon
- Monthly-1st
- Monthly-End(28th)
- Monthly-End(30th)
- Monthly-End(31st)
- Weekly-Friday
- Weekly-Monday
- Weekly-Thursday
- Weekly-Tuesday
- Weekly-Wednesday

Process Scheduler Request

User ID: COREGermainJ Run Control ID: CT_HR_WKFCE_ANALYSIS

Server Name: PSUNX Run Date: 10/25/2016
Recurrence: Recurrence Run Time: 1:10:17PM
Time Zone: Time Zone

Reset to Current Date/Time

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web	XLS	Distribution

OK Cancel

The default distribution for the query is the user who is scheduling it. If additional users are to receive the query results, follow steps 8-9 to set up the distribution. Otherwise, skip to step 10.

8. (Optional) Click on the [Distribution hyperlink](#) on the [Process Scheduler Request](#) page.

9. Add any additional Users by clicking the plus icon and selecting [ID Type](#) (User) and [Distribution ID](#) (User ID of User who is to receive the results). To remove Users from the distribution, click on the minus icon. Click the [OK](#) button when finished.

NOTE the following:

- Results can be distributed based on User or Role. However, the recommendation is to distribute by User ID because almost all Roles (e.g., CT REQUESTER, CT GL APPROVER) are shared statewide. No agency-specific Roles have been created for the purpose of scheduling queries;
- To find the correct User ID for the Distribution ID field, use the lookup icon or work with the Agency Security Liaison to find out the appropriate User ID(s).
- Email functionality for queries is not supported in Core-CT, so any data entered in the [Email Only](#) section will not be processed. Please use the distribution by User ID instead.

Distribution Detail

Process Name PSQUERY
Process Type Application Engine
Folder Name
Retention Days

Email Only

Email Subject Email With Log: Email Web Report:
Message Text
Email Address List

Distribute To

*ID Type	*Distribution ID			
User	COREGermainJ	<input type="checkbox"/>	<input type="button" value="🔍"/>	<input type="button" value="+"/> <input type="button" value="-"/>

10. Once all of the appropriate data has been entered on the [Process Scheduler Request](#) page, click on the **OK** button, which brings you back to the [Schedule Query](#) page.
11. On the [Schedule Query](#) page, the [Process Instance](#) number is displayed. NOTE: The scheduled query runs for the first time immediately. Subsequent runs occur based on the recurrence schedule selected.
12. Click on the [Process Monitor](#) hyperlink to view the status of the scheduled query. You can also navigate to [Core-CT EPM > PeopleTools > Process Scheduler > Process Monitor](#).

Schedule Query

Run Control ID: CT_HR_WKFCE_ANALYSIS Report Manager Process Monitor Run

Process Instance: 941211

Query Name: Search

*Description:

Update Parameters

Prompt Name	Value
DEPTID	<input type="text" value="DAS%"/>

Save Add Update/Display

13. On the [Process List](#) tab, verify that the correct [User ID](#) is populated. If not, enter the correct [User ID](#) and click the [Refresh](#) button. Find the row with the correct [Process Instance](#) number and/or [Run Date/Time](#). Click the [Refresh](#) button to update the [Run Status](#). Status values may be Queued, Initiated, Processing, Posting, or Success. NOTE: The Query should only take a few minutes to run, so you may need to click the Refresh button multiple times until the process has a [Run Status](#) of Success and [Distribution Status](#) of Posted.

[Process List](#) | [Server List](#)

View Process Request For

User ID Type Last 1 Days Refresh

Server Name Instance to

Run Status Distribution Status Save On Refresh

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

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	941211		Application Engine	PSQUERY	COREGermainJ	10/25/2016 1:10:17PM EDT	Success	Posted	Details
<input type="checkbox"/>	941201		Application Engine	PSQUERY	COREGermainJ	10/25/2016 12:00:26PM EDT	Success	Posted	Details

[Go back to Schedule Query](#)

Save Notify

14. See Section C for steps to view query results.

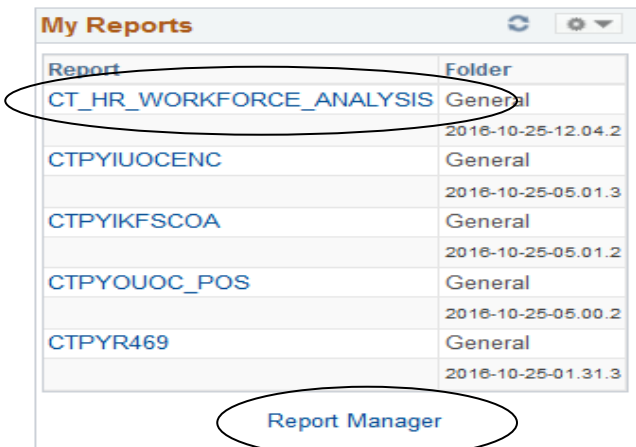
C. Viewing Query Results

Query results in EPM can be viewed using any of the following navigation paths:

1. Core-CT > Home > My Reports
2. Core-CT EPM > Reporting Tools > Report Manager
3. Core-CT EPM > Peopletools > Process Scheduler > Process Monitor

Steps below outline the navigation for these options.

4. View Query Results via My Reports: On the Core-CT application main navigation page, query results are listed as reports in the [My Reports](#) pagelet. The [Description](#) entered on the [Schedule Query](#) page is displayed as the [Report Name](#). You may need to click on the [Report Manager](#) hyperlink to view the entire list of reports available. When you find the correct report, click on the [<Report>](#) hyperlink to open the [Report Index](#) page.



Report	Folder
CT_HR_WORKFORCE_ANALYSIS	General 2016-10-25-12.04.2
CTPYIUOCENC	General 2016-10-25-05.01.3
CTPYIKFSCOA	General 2016-10-25-05.01.2
CTPYOUOC_POS	General 2016-10-25-05.00.2
CTPYR469	General 2016-10-25-01.31.3

[Report Manager](#)

5. View Query Results Via Report Manager: Navigate to [Core-CT EPM > Reporting Tools > Report Manager](#) or [Reporting Tools > Report Manager](#). Click on the [List](#) tab and, if needed, fill in the appropriate search criteria and click the [Refresh](#) button to find the correct report. When you find the correct report, click on the [<Report>](#) hyperlink to open the [Report Index](#) page.

List Explorer Administration Archives

View Reports For

Folder Instance to Refresh
 Name Created On Last 1 Days

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 CT_HR_WORKFORCE_ANALYSIS	CT_HR_WORKFORCE_ANALYSIS	General	10/25/16 12:04PM	972674	941201

- View Query Results via Process Monitor: Navigate to [Core-CT EPM > PeopleTools > Process Scheduler > Process Monitor](#). On the [Process List](#) tab, verify that the correct [User ID](#) is populated. If not, enter the correct [User ID](#) and click the [Refresh](#) button. Find the row with the correct [Process Instance](#) number and/or [Run Date/Time](#) with [Run Status](#) of Success. You may need to click on the [Details](#) hyperlink and view the [Run Control ID](#) in order to identify the correct row. Click on the [Details](#) hyperlink.

Process List Server List

View Process Request For

User ID Type Last 1 Days Refresh
 Server Name Instance to
 Run Status Distribution Status Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	941201		Application Engine	PSQUERY	COREGermainJ	10/25/2016 12:00:26PM EDT	Success	Posted	Details

Save Notify

- Click on the [View Log/Trace](#) hyperlink to open the [View Log/Trace](#) page, then click on the [file](#) hyperlink (i.e., txt or xlsx).

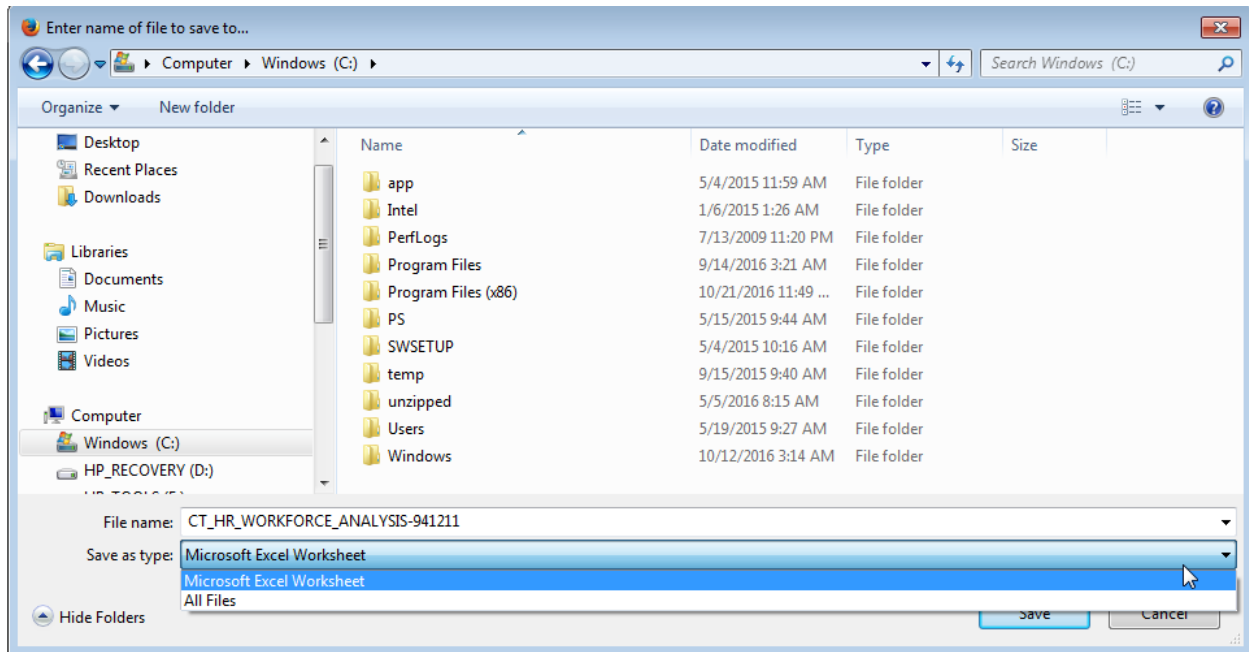
Process Detail

Process	
Instance 941201	Type Application Engine
Name PSQUERY	Description PSQUERY
Run Status Success	Distribution Status Posted

Run	Update Process
Run Control ID CT_HR_WORKFORCE_ANALYSIS	<input type="radio"/> Hold Request
Location Server	<input type="radio"/> Queue Request
Server PSUNX	<input type="radio"/> Cancel Request
Recurrence	<input type="radio"/> Delete Request
	<input type="radio"/> Re-send Content
	<input type="radio"/> Restart Request

Date/Time	Actions
Request Created On 10/25/2016 12:04:00PM EDT	Parameters Transfer
Run Anytime After 10/25/2016 12:00:26PM EDT	Message Log View Locks
Began Process At 10/25/2016 12:04:13PM EDT	Batch Timings
Ended Process At 10/25/2016 12:04:28PM EDT	View Log/Trace

- If choosing to open this file from its current location, click [Open](#).
- If choosing to save this file, click [Save](#). Once the file is downloaded successfully, you can choose to [Open](#) the file, [Open Folder](#), or [View downloads](#).
- If choosing to save this file on a specific location, click [Save As](#), then enter [File Name](#) and select [Save As Type](#), then click the [Save](#) button.



11. If you need to retain the query results for future reference, the recommendation is to [Save](#) the file to your hard drive.

D. Canceling/Deleting Scheduled Queries

If a scheduled query is incorrect, is having problems running, or is no longer needed, it should be cancelled or deleted.

1. Navigate to [Core-CT EPM > PeopleTools > Process Scheduler > Process Monitor](#). On the [Process List](#) tab, verify that the correct [User ID](#) is populated. If not, enter the correct [User ID](#) and click the [Refresh](#) button. Find the row with the correct [Process Instance](#) number and/or [Run Date/Time](#) with [Run Status](#) of Success. You may need to click on the [Details](#) hyperlink and view the [Run Control ID](#) in order to identify the correct row. Click on the [Details](#) hyperlink.

Scheduling EPM Queries

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Process List | Server List

View Process Request For

User ID Type Last 1 Days

Server Name Instance to

Run Status Distribution Status Save On Refresh

Process List Personalize | Find | View All | First 1 of 1 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	941201		Application Engine	PSQUERY	COREGermainJ	10/25/2016 12:00:26PM EDT	Success	Posted	Details

2. Click on the [Cancel Request](#) or [Delete Request](#) radio button and then click the [OK](#) button.
- Canceling a request will keep the request in the Process Scheduler queue. It can be restarted by following Step 1 above, but then clicking the [Restart Request](#) radio button in Step 2.
 - Deleting a request will remove the request from the Process Scheduler queue. If it was deleted in error, it must be recreated as a scheduled query.

Process Detail

Process

Instance 941201 Type Application Engine

Name PSQUERY Description PSQUERY

Run Status Success Distribution Status Posted

Run **Update Process**

Run Control ID CT_HR_WORKFORCE_ANALYSIS

Location Server

Server PSUNX

Recurrence

Hold Request

Queue Request

Cancel Request

Delete Request

Re-send Content

Restart Request

Date/Time **Actions**

Request Created On 10/25/2016 12:04:00PM EDT Parameters Transfer

Run Anytime After 10/25/2016 12:00:26PM EDT Message Log View Locks

Began Process At 10/25/2016 12:04:13PM EDT Batch Timings

Ended Process At 10/25/2016 12:04:28PM EDT View Log/Trace