

Exporting Query Results to Excel (.XLSX Versus .CSV)

Overview

Results from executing Core-CT EPM PS Queries can be downloaded to Excel in either .XLSX or .CSV format.

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Excel .XLSX Format

Exporting to .XLSX Excel format can be done in two ways: 1 – Run a query and select Run to Excel or 2 – Run a scheduled query setting the output format to .XLS.

1 – Run a Query

1. Login into Core-CT
2. Navigate to Core-CT EPM > Reporting Tools > Query > Query Manager
3. Enter the query name in the search box
4. Click on Search button
5. Click on the Excel link under the Run to Excel column on the row for the query to be run

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input type="checkbox"/>	CT_ALL_POSITIONS	All Positions for an Agency	Public		Edit	HTML	Excel	XML	Schedule

6. Enter criteria in any prompts displayed (if applicable)
7. Click on the View Results button

DeptID (like %):

Row	Position	Pos Descr
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8. Click Save as in the Downloads window that automatically pops up
9. Navigate to the folder of choice
10. Click Save button

Note: The downloaded Core-CT EPM Query results will be saved to an Excel file with the .xlsx extension. The first few rows will show the criteria entered (if applicable). These first rows can be deleted if needed.

2 – Run a Scheduled Query

1. Login into Core-CT
2. Navigate to Core-CT EPM > Reporting Tools > Query > Query Manager
3. Enter the query name in the search box
4. Click on Search button
5. Click on the Schedule link under the Schedule column on the row for the query to be scheduled

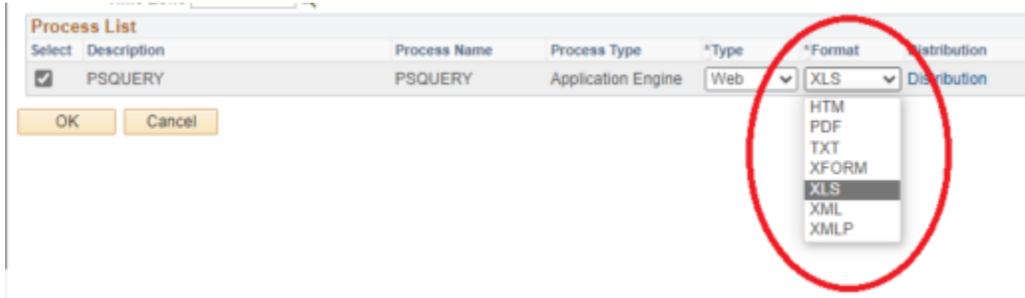
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input type="checkbox"/>	CT_ALL_POSITIONS	All Positions for an Agency	Public		Edit	HTML	Excel	XML	Schedule

6. Enter a Run Control ID (enter a name unique to the query)
7. Enter criteria in any prompts displayed (if applicable)

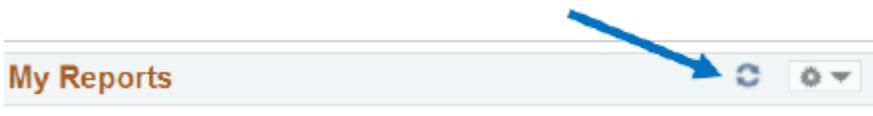
DeptID (like %):

8. Click OK button
9. Enter a description for the query (can be the same name as the query or a more detailed explanation to show the type of results returned)

10. Click OK on the Schedule Query window
11. Enter Server Name by selecting "PSUNX" Server Name from drop-down list on the Process Scheduler Request window
12. Change Format by selecting XLS from drop-down list in Format column in the Process List section on the Process Scheduler Request window



13. Click OK button
14. Navigate to the Home page
15. Click on refresh until you see the desired naming convention report



16. Click on the report name link in the Report column (Note: the report name will be the description)

My Reports	
Report	Folder
All Positions for an Agency	General
	2023-11-17-10.40.2

17. Click on the .xlsx report name in the File List section

Report

Report ID 1707618

Process Instance 1685737

[Message Log](#)

Name PSQUERY

Process Type Application Engine

Run Status Success

All Positions for an Agency

Distribution Details

Distribution Node PRODRPTFTP

Expiration Date 12/21/2024

File List

Name	File Size (bytes)	Datetime Created
AE_PSQUERY_1685737.log	4,665	11/17/2023 10:40:28.514603AM EST
CT_ALL_POSITIONS-1685737.xlsx	50,841	11/17/2023 10:40:28.514603AM EST

Distribute To

Distribution ID Type	*Distribution ID
User	COREPoppelJan

18. Click Save as in the Downloads window that automatically pops up
19. Navigate to the folder of choice
20. Click Save button

Note: The downloaded Core-CT EPM Query results will be saved to an Excel file with the .xlsx extension. The first few rows will show the criteria entered (if applicable). These first rows can be deleted if needed.

21. Close the window (by clicking on the X in the upper right corner)

Excel .CSV Format

To obtain exported query results in .CSV format, the query needs to be scheduled and the format needs to be set to .TXT.

Note: Once the results have been saved, the data will need to be “imported” into a blank Excel file to divide the data into separate columns (if that’s the desired outcome).

1. Login into Core-CT
2. Navigate to Core-CT EPM > Reporting Tools > Query > Query Manager
3. Enter the query name in the search box

- Click on Search button
- Click on the Schedule link under the Schedule column on the row for the query to be scheduled

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input type="checkbox"/>	CT_ALL_POSITIONS	All Positions for an Agency	Public		Edit	HTML	Excel	XML	Schedule

- Enter a Run Control ID (enter a name unique to the query)
- Enter criteria in any prompts displayed (if applicable)

DeptID (like %):

- Click OK button
- Enter a description for the query (can be the same name as the query or a more detailed explanation to show the type of results returned)
- Click OK on the Schedule Query window
- Enter Server Name by selecting "PSUNX" Server Name from drop-down list on the Process Scheduler Request window
- Change Format by selecting TXT from drop-down list in Format column in the Process List section on the Process Scheduler Request window

Process Scheduler Request Help

User ID: COREPoppelJan Run Control ID: ALL_POSITIONS

Server Name: Run Date:

Recurrence: Run Time:

Time Zone:

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

HTM
 PDF
TXT
 XFORM
 XLS
 XML
 XMLP

- Click OK button
- Navigate to the Home page
- Click on refresh until you see the desired naming convention report
- Click on the report name link in the Report column (Note: the report name will be the report description)
- Click on the .csv file in the File List section

18. Click Save as in the Downloads window that automatically pops up
19. Navigate to the folder of choice
20. Click Save button

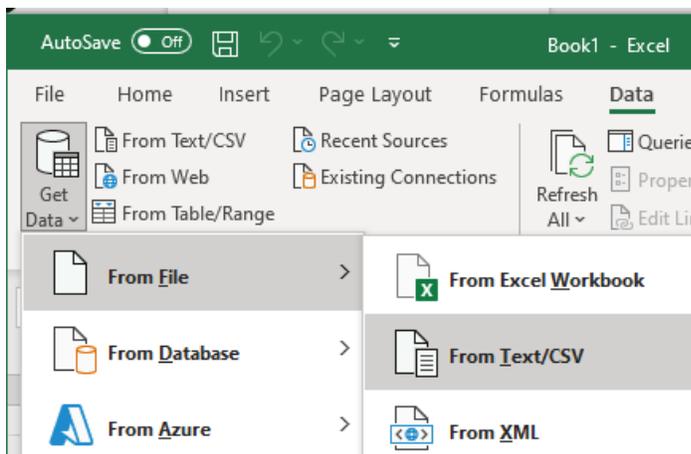
Note: The downloaded Core-CT EPM Query results will be saved to an Excel file with the .csv extension.
To divide the data into separate columns, see instruction under [Divide Data into Separate Columns](#).

Divide Data into Separate Columns

Note: Oracle no longer supports exporting PS Query results to delimited text format in Excel .CSV format.

To divide data into separate columns:

1. Open Excel
2. Select New, then click on Blank Workbook
3. Click on the Data tab
4. Select Get Data (in Get & Transform Data group) > From File > From Text/CSV



5. Navigate to the folder where the .CSV Excel file was saved
6. Click on the file to select it
7. Click Import button
8. Click Load button
9. Save the Excel file

Note: Data will be divided into separate columns with the first row being the headers/column titles.