

Core-CT EPM Query Intermediate

FN 151 AP/PO

Description

This course is designed for EPM users that are familiar with the relational database concepts of joining reporting tables. The focus of the course is intended to strengthen users' understanding of query design as well as instruct users in the specific challenges presented by complex queries.

Pre-Requisites: EPM Query Basic; Access to Core-CT EPM and Financials tables used in this class.

The class focuses on the following topics:

1. How to create queries by joining more than two tables
2. How to create user defined field joins
3. How to add custom SQL expressions to queries

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Exercise 1: Query Creation Methodology

Scenario: Provide a list of all vouchers entered for a specific time frame. Include appropriate vendor information and order by the date the voucher was entered. Include all fields from the source table, initially, to determine which fields should be included in this report.

Reference: Financials Reporting Table Summary; EPM Data Dictionary

Navigation: EPM Reporting Tools > Query > Query Manager

1. Click on [Create New Query](#)
2. Click the [Advanced Search](#) Option
3. Next to the **Uses Field Name**, click on the drop-down arrow for **Condition Type** and change to *contains*.
4. Type in the value *voucher* in the search field
5. Click **Search**

Results: All tables/records that include voucher are displayed.

6. Locate **CTW_VCHR_TRANS** record in the results and click the [Add Record](#) link
7. Click the **Check all** fields button.

Note: Hard coded criteria in a query design will limit the data in the same manner every time the query is executed. Prompts allow for different values to be entered each time the query is executed. For example, the date range could be different each time the query is run.

Establish criteria to Limit the Results of the Data Sampling Query

Limit the return to only one vendor.

1. From the Fields Tab, click on **Add Criteria icon** (funnel) next to the field **VENDOR_ID**.
2. Enter the value *0000010009* in the **Expression 2** textbox in the **Constant** field.
3. Click **OK**

Note: This is the vendor ID is for Suburban Stationers. If your agency does not purchase from Suburban, choose a different vendor.

Limit the Date Range

1. From the Fields Tab, click on **Add Criteria icon** (funnel) next to the field **ENTERED_DT**.
2. Click on the drop down arrow for **Condition Type** and change to *greater than*.
3. Enter the value *1/1/2024* in the **Expression 2** textbox in the **Define Constant** field.

Note: Peoplesoft provides a calendar look up for all date fields. The date may be entered manually in a variety of formats; eg. MM-DD-YY, MM-DD-YYYY, or the calendar can be used.

4. Click **Save** and name the query (following query maintenance rules)
5. Click **Return To Search**
6. Search for the query and run: click the [excel](#) hyperlink.

Results: Evaluate the results and decide which fields should be included in your report.

Note: Pay particular attention to the data format and length of each chosen field. For example, some fields contain text, others numbers and some are only one (1) character. To successfully establish criteria, the data display must be known.

Select Specific Fields

1. Edit Query created in step above.
2. Click on Query tab
3. Click on Uncheck All
4. Choose the fields for your report columns by checking the box next to the field names below and order to your preference.

BUSINESS_UNIT - Business Unit
VOUCHER_ID - Voucher ID
VOUCHER_LINE_NUM - Voucher Line
Number
DISTRIB_LINE_NUM - Distribution Line
Number
INVOICE_DT - Invoice Date
INVOICE_ID - Invoice Number
VENDOR_ID - Vendor ID
CT_VNDR_NAME1 - Vendor

Name 1 OPRID - User ID
 ACCOUNTING_DT - Accounting Date
 PYMNT_TERMS_CD - Payment Terms ID
 ENTERED_DT - Entered on
 CT_VCHR_LN_DESCR - Voucher Line
 Description CNTRCT_ID - Contract Id
 MONETARY_AMOUNT - Monetary
 Amount ACCOUNT – Account
 FUND_CODE - Fund
 Code CT_SID – SID
 DSCNT_AMT - Discount
 Amount DSCNT_DUE_DT -
 Discount Due Date

Exercise 2: Create Query Prompts & Adjust Data

1. Create a query using CTW_VCHR_TRANS table and select fields of choice.

Note: The query created in Step 1 above can be copied or a new query can be created. If copying the above query, delete Voucher ID and Entered Date criteria.

Establish a Prompt on Business Unit

Set up a prompt on Business Unit to limit the results.

1. From the Fields Tab, Click on **Add Criteria icon** (funnel) next to the field BUSINESS_UNIT.

Query Name: FRP151_EXERCISE1

Description:

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

Reorder / Sort

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.BUSINESS_UNIT - Business Unit	Char5				Unit		Edit	
2	A.VOUCHER_ID - Voucher ID	Char8				Voucher		Edit	
3	A.VOUCHER_LINE_NUM - Voucher Line Number	Num5.0				Line		Edit	

2. Select *equal to* in the **condition type box**, and in **Choose Expression 2 Type** box, click radio button for **Prompt**; In the **Expression 2** box, click the [New Prompt](#) link.

Edit Criteria Properties

Choose Expression 1 Type

Field
 Expression

Expression 1

Choose Record and Field

Record Alias.FieldName:

Condition Type: equal to

Choose Expression 2 Type

Field
 Expression
 Constant
 Prompt
 Subquery







Expression 2

Define Prompt

Prompt: [Edit Prompt](#)

3. Enter the text to appear with the runtime prompt. Click in the **Heading Text** box. Enter *Business Unit=*. Click **OK**.

Edit Prompt Properties

Field Name:  BUSINESS_UNIT	*Heading Type: RFT Short 
*Type: Character 	Heading Text: Business Unit=
*Format: Upper 	*Unique Prompt Name: BIND3
Length: <input type="text" value="5"/>	
Decimals: <input type="text"/>	
*Edit Type: No Table Edit 	Prompt Table: 
<input type="button" value="OK"/>	<input type="button" value="Cancel"/>

Adding a Prompt from the Prompts Tab and using the Condition type Between prompts on a date field

1. From the **Prompts Tab**, Click on **Add Prompt**.
2. Click on the **looking glass** icon under **Field Name**. Search by fieldname: type in **ENTERED_DT**, click search
3. Click the hyperlink for the field **ENTERED_DT**
4. Enter the text to appear with the runtime prompt by clicking in the **Heading Text box**. Enter *Entered Date From*. Click **OK**.
5. To set up the second date prompt, follow the steps to create the first date prompt. The heading text for the second date prompt should read: *Entered Date To*.

Add Prompt

Prompts List			Personalize	Find	First	1-3 of 3	Last
Prompt	Edit	Delete					
:1 = BUSINESS_UNIT - Business Unit =	Edit	-					
:2 = ENTERED_DT - Entered Date From	Edit	-					
:3 = ENTERED_DT - Entered Date To	Edit	-					

Prompts set up from the Prompts Tab must also be entered as Criteria

1. From the Fields Tab, Click on the **Add Criteria button** for the field **ENTERED_DT**.
2. Click the drop down arrow and choose **condition type** *between*.
3. In the **Choose expression 2 Type** box, click the **Expr – Expr** radio button.
4. Under **Expression 2** group box, **Define Expression**, Click the first [Add Prompt](#) link. The **Select Prompt Page** appears. Select *Entered Date From (:1)* for the first expression and *Entered Date To (:2)* for the second expression.

Edit Criteria Properties

Choose Expression 1 Type

Field
 Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:
A. ENTERED_DT - Entered on

Condition Type: between

Choose Expression 2 Type

Const - Const
 Const - Field
 Const - Expr
 Field - Const
 Field - Field
 Field - Expr
 Expr - Const
 Expr - Field
 Expr - Expr

Expression 2

Define Expression 1

Expression: :1

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

Define Expression 2

Expression 2: :2

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

OK Cancel

4. Click **OK**.

Establish a Prompt on Contract ID using the wildcard %

Note: EPM allows the use of two wildcards; % (percent sign) will return any number of characters and can be used at the beginning and/or end of a field, _ (underscore) allows the return of only one character and is primarily used in the middle of a field.

1. From the Fields Tab, Click on **Add Criteria icon** (funnel) next to the field **CNTRCT_ID**.
2. Select *like* in the **condition type** box, and in **Expression 2 Type** group box, click the radio button **Prompt**; under **Expression 2** group box, select [New Prompt](#) link.
3. Enter the text to appear with the runtime prompt. Click in the **Heading Text** box. Enter Contract ID *like (%)*.
4. Click **OK**.

Note: When entering values for the prompt on **CNTRCT_ID**, you may enter the entire contract number, part of the number (eg. %PSX%, to return all DAS master contracts), or % (returns all contracts).

Establish Criteria on a Field and Not Display the Results

Note: Setting criteria and not displaying the results eliminates extraneous columns from the report and is essential in the development of summary queries.

1. From the **Query Tab**, Click on **Add Criteria icon** (funnel) next to the field **POST_STATUS_AP** - Post Status.
2. Select *equal* to in the **condition type** box and a enter the constant of *P* (posted) in the **Expression 2** group box under **Define Constant**. Only posted vouchers will be returned by this query.
3. Click **OK**
4. Name and Save the query
5. Run to excel.

Results: Evaluate the result.

Renaming Column Headers, Changing Column Order, Sorting Data

Rename Column Headers

1. From the fields tab, click the **Edit Button** for BUSINESS_UNIT

The screenshot shows the 'Fields' tab of a software application. At the top, there are several tabs: Records, Query, Expressions, Prompts, Fields, Criteria, Having, View SQL, and Run. Below the tabs, there are fields for 'Query Name: New Unsaved Query' and 'Description:'. A message says 'View field properties, or use field as criteria in query statement.' To the right of this message is a 'Reorder / Sort' button. Below this is a table with the following columns: Col, Record, Fieldname, Format, Ord, XLAT, Agg, Heading Text, Add Criteria, Edit, and Delete. The first row of the table contains: 1, A.BUSINESS_UNIT - Business Unit, Char5, Unit. The 'Edit' button for this row is circled in red.

Col	Record	Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.	BUSINESS_UNIT - Business Unit	Char5				Unit		Edit	

2. In the **Heading Group** box, click the **Text** radio button; click in the **Heading Text** box and type in the new column header name *Business Unit*:

Edit Field Properties

Field Name: A.BUSINESS_UNIT - Business Unit

Heading	Aggregate
<input type="radio"/> No Heading <input type="radio"/> RFT Short <input checked="" type="radio"/> Text <input type="radio"/> RFT Long Heading Text: <input type="text" value="Business Unit"/> *Unique Field Name: <input type="text" value="A.BUSINESS_UNIT"/>	<input checked="" type="radio"/> None <input type="radio"/> Sum <input type="radio"/> Count <input type="radio"/> Min <input type="radio"/> Max <input type="radio"/> Average
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

Results: The column name that appears on the query output has been changed.

Before

FRP	2		
Unit	Voucher	Line	Line
DOCM1	00003063	1	1
DOCM1	00003063	2	1

After

	A	B	C	D
1	FRP	2		
2	Business Unit	Voucher	Line	Line
3	DOCM1	00003063	1	1
4	DOCM1	00003063	2	1
5				
6				

Change the column order

1. From the **Fields** tab, click the **reorder/sort** button.
2. Renumber the columns in the boxes on the left, **New Column**, to change the column order display.

Sort the Data

Note: The functionality of sorting data groups all the data by the chosen field(s). The limitation is there is no option for subtotaling.

1. From the fields tab, click the **Reorder/Sort button**

2. Put a 1 in the far right column, **New Order By**, corresponding to the field by which you wish to group your data. The default value is ascending. If you want descending, click the box in the Order by Descending Column.
3. Save and execute the query.

Exercise 3: Create New AP Query using Two Tables

Scenario: Produce a list of vouchers where the payment handling code is RA (Returned Payment) to verify the accuracy of the payment notes and message.

Reference: *Financials Reporting Table Summary; EPM Data Dictionary*

Tables: The information required resides on two tables, CTW_VCHR_TRANS and CTW_PAYVC_XREF

Note: Prior to joining tables, the EPM Job Aid, Reporting Table Indexes and Join Criteria, must be checked to ensure the accuracy of the field joins suggested by the query manager tool. Not all auto joins are correct due to incompatibility between State business practice and the Peoplesoft product.

Navigation: EPM Reporting Tools > Query > Query Manager

Add the First Record

1. Click [Create New Query](#)
2. Click the [Advanced Search](#) Option
3. Next to the **Uses Field Name**, click on the drop-down arrow for **Condition Type** and change to *contains*.
4. Type in the value *voucher*
5. Click **Search**

Results: All tables/records that include voucher are displayed.

6. Locate **CTW_VCHR_TRANS** record in the results and click the [Add Record](#) link

Add the Second Record

1. Go to the **Records** Tab
2. Click the [Advanced Search](#) Option
3. Next to the **Uses Field Name**, click on the drop-down arrow for **Condition Type** and change to *contains*.
4. In the Search field provided, enter the value *PYMNT_HANDLING_CD*

*Results: All tables/records that include
PYMNT_HANDLING_CD are displayed.*

5. Locate **CTW_PAYVC_XREF** record in the results and click the [Join Record](#) link.

Note: Do not change the join type setting. Use the standard join suggested by the query manager tool.

6. Click on the hyperlink identifying the record you wish to join to. In this case, click on the link for the record, **CTW_VCHR_TRANS**.

[New Window](#)

Select join type and then record to join with **CTW_PAYVC_XREF - Pay Voucher XRef Rpt.**

Join Type

Join to filter and get additional fields (Standard Join)

Join to get additional fields only (Left outer join)

Join Record Customize | Find | First 1 of 1 Last

[A= CTW_VCHR_TRANS - Voucher Transactions Rpt](#)

Cancel

7. Accept the field joins suggested by the tool by clicking on the **Add Criteria** button.

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.BUSINESS_UNIT - Business Unit = B.BUSINESS_UNIT - Business Unit
<input checked="" type="checkbox"/>	A.VOUCHER_ID - Voucher ID = B.VOUCHER_ID - Voucher ID

Add Criteria

Cancel

Note: Preceding letters are placed before each field name. The query manager tool assigns each table an alias (letter) which is referenced throughout the query component and is used instead of the table name. In the above case the alias A is assigned to CTW_VCHR_TRANS, the alias B to CTW_PAYVC_XREF.

Select the Fields for Report Columns

1. Be sure to select the fields listed below from the appropriate tables in this query, *A* or *B*.

A.BUSINESS_UNIT - Business Unit
A.VOUCHER_ID - Voucher ID
A.VOUCHER_LINE_NUM - Voucher Line Number
A.DISTRIB_LINE_NUM - Distribution Line Number
A.INVOICE_DT - Invoice Date
A.VENDOR_ID - Vendor ID
A.CT_VNDR_NAME1 - Vendor Name 1
A.CT_VCHR_LN_DESCR - Voucher Line Description
B.CT_PYMNT_NOTES - Payment Notes
B.PAID_AMT - Paid Amount
B.PYMNT_MESSAGE – Payment Message
A.MONETARY_AMOUNT - Monetary Amount

Set up Query Criteria

Establish a run-time Prompt on Business Unit.







1. Go to the **Fields** Tab.
2. Click on **Add Criteria** icon (funnel) next to the field **BUSINESS_UNIT**.

Query Name: FRP151_EXERCISE1

Description:

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

Reorder / Sort

Col	Record	Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A	BUSINESS_UNIT - Business Unit	Char5				Unit		Edit	
2	A	VOUCHER_ID - Voucher ID	Char8				Voucher		Edit	
3	A	VOUCHER_LINE_NUM - Voucher Line Number	Num5.0				Line		Edit	

3. Select *equal* to in the **condition type** box.
4. In the **Expression 2** group box, click the radio button for **Prompt**.
5. Click the [New Prompt](#) link.

[New](#)

Edit Criteria Properties

Choose Expression 1 Type


Field


Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:

 A.BUSINESS_UNIT - Business Uni

*Condition Type: equal to 

Choose Expression 2 Type

Field

Expression


Constant

Prompt

Subquery

Expression 2







Define Prompt

Prompt:  [New Prompt](#) [Edit Prompt](#)

OK Cancel

5. Enter the text to appear with the runtime prompt. Click in the **Heading Text** box. Enter *Business Unit=*

Edit Prompt Properties

Field Name:  BUSINESS_UNIT	'Heading Type: RFT Short 
'Type: Character 	Heading Text: Business Unit=
'Format: Upper 	'Unique Prompt Name: BIND1
Length: <input type="text" value="5"/>	
Decimals: <input type="text"/>	
'Edit Type: No Table Edit 	Prompt Table: 
<input type="button" value="OK"/>	<input type="button" value="Cancel"/>

6. Click **OK**.

Adding a Prompt from the Prompts Tab and using the Condition type Between prompts on a Date Field

1. Go to the **Prompts Tab**.
2. Click on **Add Prompt**.
3. Click on the **looking glass icon** under field name.
Search by fieldname and enter *ENTERED_DT* in search field
4. Click **Search**
5. Click the hyperlink for the field [ENTERED_DT](#)
6. Enter the text to appear with the runtime prompt by clicking in the **Heading Text box** and enter *Entered Date From*.
7. Click **OK**.
8. To set up the second date prompt, follow the steps to create the first date

prompt. The **Heading Text box** for the second date prompt should read:
Entered Date To.

Note: Prompts set up from the Prompts Tab must also be entered as criteria.

9. Go to the **Query** Tab.
10. Click on the **Add Criteria** button for the field **ENTERED_DT**.
11. Click the drop down arrow and choose **Condition Type** *between*.
12. In the **Choose Expression 2 Type** box, choose the radio button for **Expr-Expr**.
13. In the **Expression 2 group box, Define Expression**, Choose the [Add Prompt](#) link. The select prompt page appears, select *Entered Date From* prompt for the first expression and *Entered Date To* prompt for the second expression.
14. Click **OK**.

Edit Criteria Properties

Choose Expression 1 Type

Field
 Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:

A. ENTERED_DT - Entered on

*Condition Type: between

Choose Expression 2 Type

Const - Const
 Const - Field
 Const - Expr
 Field - Const
 Field - Field
 Field - Expr
 Expr - Const
 Expr - Field
 Expr - Expr

Expression 2

Define Expression

Expression: :1

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

Define Expression 2

Expression 2: :2

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

OK Cancel

Add Not in List Criteria on Field

1. Go to the **Fields Tab**.
2. Click on the **Add Criteria button** for the field **VENDOR_ID**
3. Click the drop down arrow and choose **Condition Type** of *not in list*
4. Under **Expression 2, Edit List**: Click on the **looking glass** icon to set up the list of excluded vendors

Edit Criteria Properties

Choose Expression 1 Type

Field
 Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:

A.VENDOR_ID - Vendor ID

Condition Type: not in list

Choose Expression 2 Type

In List
 Subquery

Expression 2

Edit List

List Members:

OK Cancel

5. Add the vendor ID's to the list one at a time and Enter the following Vendors IDs: 0000059169, 0000010016 and 0000010008.

Edit List

No values have been added yet.

Value:

Add Value

[Add Prompt](#)

OK Cancel

Note: Vendor IDs used in this exercise are in accordance with Comptroller's Memorandum, 2009-04, February 19, 2009.

Establish Criteria on a Field without Displaying the Results

Note: Setting criteria and not displaying the results eliminates extraneous columns from the report and is essential in the development of summary queries.

1. Go to the **Query Tab**.
2. Click on **Add Criteria icon** (funnel) next to the field **PYMNT_HANDLING_CD**, located on the B table.
3. Select *equal to* in the **Condition Type** box
4. In the **Expression 2 box**, define a constant value of *RA*.

Note: Payment Handling Codes used in this exercise are in accordance with Comptroller's Memorandum, 2009-31, dated September 18, 2009.

5. Click OK.
6. Go to the **Query** tab.
7. Click on **Add Criteria icon** (funnel) next to the field **POST_STATUS_AP** - Post Status.
8. Select *equal to* in the **Condition Type** box
9. In **Expression 2** group box, define a constant of *P* (posted).
10. Click OK.
11. Click **Save** and name the query
12. Click **Return To Search**
13. Search for the query and run and click the [excel](#) hyperlink.

Results: Evaluate query results

Exercise 4: Create New PO Query using Two Tables

Scenario: Provide purchase order information where the vendor is certified as Small or Minority Business enterprise (SBE or MBE).

Reference: *Financials Reporting Table Summary; EPM Data Dictionary*

Required tables: CTW_PO_TRANS and CTW_VNDR_CERT_V.

Note: Prior to joining tables, the EPM Job Aid, Reporting Table Indexes and Join Criteria, must be checked to ensure the accuracy of the field joins suggested by the query manager tool. Not all auto joins are correct due to incompatibility between State business practice and the Peoplesoft product.

Navigation: EPM Reporting Tools > Query > Query Manager

Add the First Record

1. Click [Create New Query](#)
2. Click the [Advanced Search](#) Option
3. Next to the **Uses Record Name**, using the default **Condition Type** of *begins with*, enter the value *CTW_P* in the Search Field
4. Click **Search**

Results: All tables/records that begin with CTW_P are displayed.

3. Locate **CTW_PO_TRANS** record in the results and click the [Add Record](#) link

Add the Second Record

1. Go to the **Records** Tab
2. Click the [Advanced Search](#) Option
3. Next to the **Uses Record Name**, using the default **Condition Type** of *begins with*, enter the value *CTW_VND*
4. Click **Search**

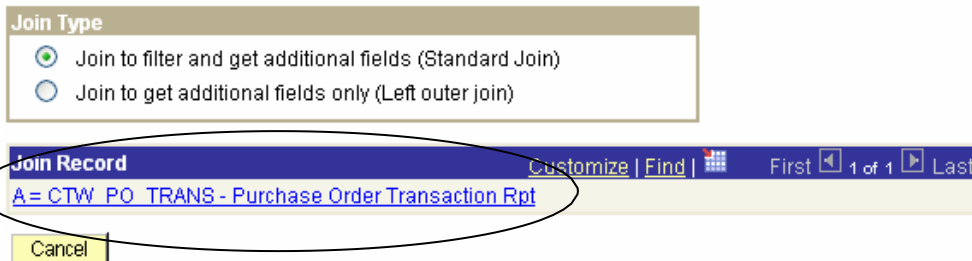
Results: All tables/records that begin with **CTW_VND** are displayed.

5. Locate **CTW_VNDR_CERT_V** record in the results and click the [Join Record](#) link.

Note: Do not change the join type setting. Use the standard join suggested by the query manager tool.

6. Click on the hyperlink identifying the record you wish to join to. In this case, click on the link for the record, [A=CTW_PO_TRANS - Purchase Order Transaction Rpt](#)

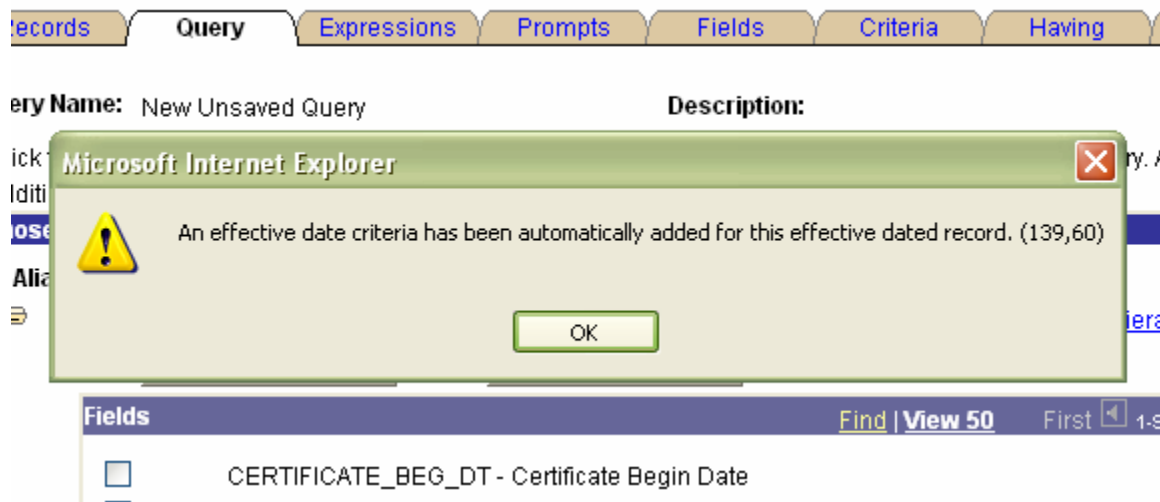
Select join type and then record to join with **CTW_VNDR_CERT_V - Vendor Certification View**.



7. Accept the field joins suggested by the tool by clicking on the **Add Criteria** button.

A.VENDOR_ID = B.VENDOR_ID

8. In the message window that appears stating *An effective date criteria has been automatically added for this effective dated record*, Click **OK**



Note: Effective Dated Logic is built into the design of some records/tables. When data is entered into Core-CT, a new row is added to the record with an effective date, and the system retains the previous row(s) as history. Rows may also be future dated. Effective date logic allows for the return of the most current row of information. These criteria can be removed from queries to view all historical, current and future dated rows.

Using EPM Reporting Table Indexes and Joint Criteria Job Aid

The aforementioned aid indicates there is an additional field join between **CTW_PO_TRANS** and **CTW_VNDR_CERT_V**.

A.VENDOR_SETID = B.SETID

Add Additional Field Join Criteria

1. Go to the **Query Tab**
2. Click **Add Criteria** button for the field **A.VENDOR_SETID** on reporting table A, **CTW_PO_TRANS**
3. Accept the default condition type *equal to*.
4. Click on the radio button *Field* in the **Choose Expression 2 Type** group box
5. Click in the **looking glass** in the **Expression 2:Choose Record and Field** group box
6. Click the **Show Fields** button for table B, **CTW_VNDR_CERT_V**
7. Click on the link for the field [B.SETID – SetID](#)

Edit Criteria Properties

Choose Expression 1 Type

Field
 Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:
A.VENDOR_SETID - Vendor SetID

*Condition Type: equal to

Choose Expression 2 Type

Field
 Expression
 Constant
 Prompt
 Subquery

Expression 2

Choose Record and Field

Record Alias.Fieldname:
B.SETID - SetID

OK Cancel

Results: An additional table join has been added manually to the query design.

Select Fields to be Displayed

Pay particular attention to the table alias.field name.

A.BUSINESS_UNIT - Business Unit
A.PO_ID - Purchase Order
A.LINE_NBR - Line Number
A.SCHED_NBR - Schedule Number
A.DISTRIB_LINE_NUM - Distribution Line Number
A.ACCOUNTING_DT - Accounting Date
A.PO_DT - Purchase Order Date
A.CNTRCT_ID - Contract Id
A.PO_TYPE - PO Type
A.CT_OBLIGATED_AMT - Applied Amount
A.CT_VNDR_NAME1 - Vendor Name 1
A.MONETARY_AMOUNT - Monetary Amount
B.CERTIFICATE_BEG_DT - Certificate Begin Date
B.CERTIFICATE_EXP_DT - Certificate Expiration
B.CERTIF_SOURCE - Certification Source
B.EFFDT - Effective Date

Set up Query Criteria

Establish a Prompt on Business Unit.

1. Go to the **Fields Tab**.
2. Click on **Add Criteria** icon (funnel) next to the field **BUSINESS_UNIT**.
3. Select *equal to* in the **Condition Type** box.
4. In the **Expression 2** group box, click the radio button for *Prompt*.
5. Click the [New Prompt](#) link.
5. Enter the text to appear with the runtime prompt. Click in the **Heading Text** box and enter *Business Unit=*
6. Click **OK**.

Add a Prompt from the Prompts Tab and use the Condition type Between prompts on a date field.

7. Go to the **Prompts Tab**
8. Click on **Add Prompt**.
9. Click on the **looking glass** icon under **Field** name.
10. In the search by fieldname enter *ACCOUNTING_DT*
11. Click **Search**
12. Click the hyperlink for the field [ACCOUNTING_DT](#)
13. Enter the text you want to appear with the runtime prompt.
14. Click in the **Heading Text** box. Enter *Accounting Date From*.
15. Click **OK**.
16. To set up the second date prompt, follow the steps to create the first date prompt. The heading text for the second date prompt should read: *Accounting Date To*.
17. From the **Fields Tab**, Click on the Add Criteria icon for the field **ACCOUNTING_DT**.

Note: Prompts set up from the Prompts Tab must also be entered as criteria.

18. Click the drop down arrow and choose **Condition Type** of *between*.

19. In the Choose Expression 2 Type group box, choose the radio button for **Expr-Expr**.

20. Choose the [Add Prompt](#) link. The select prompt page appears, select Accounting Date From for the first expression and Accounting Date To for the second expression.

21. Click **OK**.

Using Fields with Translate Values

Note: On the Fields Tab, the column labeled **XLAT** contains an indicator (N) for fields where data has further identifying translate values. Looking at the following screen shot, PO_TYPE is a field that has translate values. Use the Edit button and Edit Fields Page to display short or long descriptions in your query for corresponding field translate values.

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

Query Name: New Unsaved Query Description:

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

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.BUSINESS_UNIT - Business Unit	Char5				Unit	+	Edit	-
2	A.PO_ID - Purchase Order	Char10				PO	+	Edit	-
3	A.PO_TYPE - PO Type	Char4		N		Type	+	Edit	-
4	A.RECV_STATUS - Receipt Status	Char1		N		Receipt	+	Edit	-
5	A.DISP_METHOD - Dispatch Method	Char3		N		Method	+	Edit	-
6	A.CT_HDR_CHNGE_STAT - Header Change Order Status	Char1		N		Hdr Chng Stat	+	Edit	-
7	A.ACCOUNTING_DT - Accounting Date	Date				Acctg Date	+	Edit	-

Note: Examples of translate values for the PO_TYPE field and their long and short descriptions follow:

Field Value	Translate Long Name	Translate Short Name
BLKT	Blanket PO	Blanket
CON	Construction	Construct
GEN	General	General
GL	General Letter	GL
GRT	Grant	Grant
KAN	Kanban	Kanban
LOAN	Loan	Loan
MLYR	Multi-Year PO	MLYR
MOU	MOU	MOU
OTHR	Other	Other
POC	POS Competitive	POS Comp
PON	POS Noncompetitive	POS Noncom
POS	POS	POS
PSA	PSA	PSA
PSC	PSA Competitive	PSA Comp
PSN	PSA Noncompetitive	PSA Noncom
RL	Rental Lease	Rntl Lease
ROW	Right Of Way	RT OfWay
SCS	Statutory Contractual Services	SCS

1. Go to the **Fields Tab**
2. Click the **Edit** Button for the field **PO_TYPE**
3. Choose the radio button in the **Translate Value** group box for **Long**

Edit Field Properties

Field Name: A.PO_TYPE - PO Type

The screenshot shows the 'Edit Field Properties' dialog box with three main sections: 'Heading', 'Aggregate', and 'Translate Value'.
 - **Heading**: Radio buttons for 'No Heading', 'Text', 'RFT Short', and 'RFT Long'. 'RFT Short' is selected. Below are text boxes for 'Heading Text:' (containing 'Type') and 'Unique Field Name:' (containing 'A.PO_TYPE').
 - **Aggregate**: Radio buttons for 'None', 'Sum', 'Count', 'Min', 'Max', and 'Average'. 'None' is selected.
 - **Translate Value**: Radio buttons for 'None', 'Short', and 'Long'. 'Long' is selected and circled in red. Below is a section titled 'Effective Date for Short/Long' with radio buttons for 'Current Date', 'Field', and 'Expression'. 'Current Date' is selected. There are dropdown menus for 'Field' and 'Expression'. At the bottom are 'Add Prompt' and 'Add Field' buttons.
 At the bottom of the dialog are 'OK' and 'Cancel' buttons.

4. Click **OK**

Results: The long translate value for the field PO_TYPE will display in the query results.

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

Query Name: New Unsaved Query Description:

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

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit	Delete
1	A.BUSINESS_UNIT - Business Unit	Char5				Unit		Edit	
2	A.PO_ID - Purchase Order	Char10				PO		Edit	
3	A.PO_TYPE - PO Type	Char4		L		Type		Edit	

- Click **Save** and name the query
- Click **Return To Search**
- Search for the query and run: click the [excel](#) hyperlink.

Results: Evaluate the data returned by the query

Exercise 5: Create New Query Using Three Tables, Summary vs Detail

Scenario: Create a query to select all vendor payments for a particular SID and Business Unit for a specific payment date range. Modify the query created to produce both a detail and summary representation of the data.

Reference: *Financials Reporting Table Summary; EPM Data Dictionary*

The information required resides on three tables, CTW_VCHR_TRANS, CTW_PAYVC_XREF, and CTW_PAYMNT_TRN.

Note: Prior to joining tables, the EPM Job Aid, Reporting Table Indexes and Join Criteria, must be checked to ensure the accuracy of the field joins suggested by the query manager tool. Not all auto joins are correct due to incompatibility between State business practice and the Peoplesoft product.

Create a Query joining three tables.

Navigation: EPM Reporting Tools > Query > Query Manager>

Add the First Record

1. [Create New Query](#)
2. Click the [Advanced Search](#) Option
3. Next to the **Record Name**, select the default **Condition Type** *begins with*.
4. In the Search Field, enter in the value *CTW_VCHR*
5. Click **Search**

Results: All tables/records that begin with CTW_VCHR are displayed.

6. Locate **CTW_VCHR_TRANS** record in the results and click the [Add Record](#) link

Add the Second Record

1. Go to the **Records** Tab
2. Click the [Advanced Search](#) Option
3. Next to the **Record Name**, select the default **Condition Type** *begins with*.
4. In the Search field, enter the value *CTW_PAYV*
5. Click **Search**

Results: All tables/records that begin with CTW_PAYV are displayed.

6. Locate **CTW_PAYVC_XREF** record in the results and click the [Join Record](#) link.

Note: Do not change the join type setting. Use the standard join suggested by the query manager tool.

7. Click on the hyperlink identifying the record you wish to join to. In this case, click on the link for the record, **CTW_VCHR_TRANS**.
8. Accept the field joins suggested by the tool by clicking on the Add Criteria button.

A.BUSINESS_UNIT=B.BUSINESS_UNIT
A.VOUCHER_ID=B.VOUCHER_ID

Add the Third Record

1. Go to the **Records** Tab
2. Click the [Advanced Search](#) Option
3. Next to the **Record Name**, select the default **Condition Type** *begins with*.
4. In the Search field, enter the value **CTW_PAYM**.
5. Click **Search**

Results: All tables/records that begin with CTW_PAYM are displayed.

6. Locate **CTW_PAYMNT_TRN** record in the results and click the [Join Record](#) link.
7. Click on the hyperlink identifying the record you wish to join to. Since you are joining three records, there is now a choice for which records to be joined. Click on the hyperlink for the record, **CTW_PAYVC_XREF**.
8. Accept the field joins suggested by the tool by clicking on the Add Criteria button.

C.BANK_SETID= B.BANK_SETID
 C.BANK_CD=B.BANK_CD
 C.BANK_ACCT_KEY=B.BANK_ACCT_KEY
 C.PYMNT_ID=B.PYMNT_ID

Results: Three tables are now joined. A joined to B and B joined to C, allowing retrieval of data from any of three tables.

Note: The EPM Reporting Table, **CTW_PAYVC_XREF** (Table B) is an intermediary table. It is not necessary to use any of the fields on this table in your query. The **CTW_VCHR_TRANS** Table (Table A) and **CTW_PAYMNT_TRN** table (Table C) are not joinable, and you therefore need Table B to bridge the join between these tables.

Select the Fields to be Displayed

Pay particular attention to the table alias.field name.

A.VOUCHER_ID - Voucher ID
 A.VOUCHER_LINE_NUM - Voucher Line Number
 A.DISTRIB_LINE_NUM - Distribution Line Number
 A.VENDOR_ID - Vendor ID
 A.CT_VNDR_NAME1 - Vendor Name 1
 A.MONETARY_AMOUNT - Monetary Amount
 A.ACCOUNT – Account
 A.DEPTID – Department
 A.FUND_CODE - Fund Code
 A.CT_SID – SID

A.PROGRAM_CODE - Program Code
C.PYMNT_ID_REF - Payment Reference
C.PYMNT_DT - Payment Date

Set up Query Criteria

1. Establish a Prompt on **BUSINESS_UNIT**.
2. Add a **condition type** between Prompts for the field, **PYMNT_DT**.
3. Add a **condition type like Prompt** for the field, **CT_SID**.
4. Click **Save** and name the query
5. Click **Return To Search**
6. Search for the query and run: click the [excel](#) hyperlink.

Results: Evaluate the data returned by the query

Modify the Existing Query to Produce Summary Information Only

Requested information: **Total Payment Amount** by **Vendor** and **SID** for a **specified date range**.

Note: A successful summary query contains as few fields as possible without losing the effective display of information.

1. Go to the **Fields** Tab.
2. Using the **Delete** (minus) button to the right of corresponding fields, remove all unnecessary fields. (**Note:** Vendor ID, SID, and Monetary Amount columns should remain.)
3. Click the Edit Button for the field **A.MONETARY_AMOUNT**
4. Click the radio button **SUM**
5. Click **Save As** and name the query. Make sure you choose a different name from the detail version.
6. Click **Return To Search**
7. Search for the query and run: click the [excel](#) hyperlink.

Results: Evaluate the data returned by the query. The query should return one row of data per vendor.

Exercise 6: Selected Expressions

Scenario: Create a query to audit agency procurement contracts.

Reference: *Financials Reporting Table Summary; EPM Data Dictionary*

The information required resides on two tables, **CTW_VCNT_DEF** - Vendor Contract Defaults Rpt and **CTW_VCNRCT** - Vendor Contracts Rpt.

Note: Prior to joining tables, the EPM Job Aid, Reporting Table Indexes and Join Criteria, must be checked to ensure the accuracy of the field joins suggested by the query manager tool. Not all auto joins are correct due to incompatibility between State business practice and the Peoplesoft product.

Navigation: EPM Reporting Tools > Query > Query Manager

Create a New Query

1. Click [Create New Query](#)
2. Select the records to be used in the query.
3. Join the records using only the field joins identified in the EPM Job Aid.
4. Choose the fields to be displayed:

A.CNTRCT_ID - Contract Id
A.CNTRCT_LINE_NBR - Buying Agreement Line Nbr
A.BUSINESS_UNIT - Business Unit
A.DISTRIB_LINE_NUM - Distribution Line Number
A.ACCOUNT – Account
A.FUND_CODE - Fund Code
A.CT_SID – SID
A.PROGRAM_CODE - Program Code
A.PROJECT_ID – Project
A.PYMNT_TERMS_CD - Payment Terms ID
B.VENDOR_ID - Vendor ID
B.CT_VNDR_NAME1 - Vendor Name 1
B.CNTRCT_BEGIN_DT - Contract Beginning Date
B.CNTRCT_EXPIRE_DT - Expire Date

B.AMT_CNTRCT_MAX - Maximum Amount
B.CT_STCNTRCT_TYP - State Identified Contract Type
B.CT_CTRCT_LN_DM254 - Contract Line Description

4. Reorder the columns to produce a user-friendly report.
5. Hard code criteria to exclude cancelled contracts and cancelled contract lines.

Expressions

Note: Expressions enable data manipulation or transformations in the Query Manager Tool as part of a query. An expression can be used to calculate a value not provided by PeopleSoft Query, such as adding the values from two fields together. Expressions also are the vehicle used to insert SQL coding into a query, such as the function substring. Expressions can be displayed as a field, have criteria applied and used as prompts. All expressions are entered using the same steps.

Enter an expression to calculate the value of one field multiplied by the value in another field

1. Go to the **Expressions** Tab.
2. Click **Add Expression**.
3. Click on the **Expression Type** drop down menu and choose *Signed Number*.
4. In the **Length** field, enter the number of characters large enough to display the entire data string.
5. In the **Decimals** field, enter the desired number of decimal places.
6. Click in the **Expression Text Box**
7. Click the hyperlink, [Add Field](#)
8. Select the field, [A.MERCH_AMT_DIST - Distribution Merchandise Amt](#), by clicking on the link.
9. Type the character * (multiplication).
10. Click the hyperlink, [Add Field](#)
11. Select the field, [A.DISTRIB_PCT - Distribution Percentage](#), by clicking on the link.

Edit Expression Properties

Expression Type:
Signed Number Length:

Aggregate Function Decimals:

Expression Text:

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

12. Click **OK**.

13. Click [Use as Field](#).

Results: Using the functionality of the Expressions Tab, you have created a new field which will display the value of one field multiplied by the value in another.

14. Re-label the column heading for the new field.

Enter an expression to return only a portion of a field

1. Go to the **Expressions Tab**.
2. Click **Add Expression**.
3. Click on the **Expression Type** drop down menu and choose *character*.
4. In the **Length** field, enter the number of characters large enough to display the entire data string.
5. Click in the **Expression Text** Box

6. Enter in the syntax values *SUBSTR*(
7. Click the hyperlink, [Add Field](#)
8. Select the field, [A.CNTRCT_ID - Contract Id](#), by clicking on the link.
9. Enter in syntax values *,1,9)*

Edit Expression Properties

*Expression Type: Length:

Aggregate Function Decimals:

Expression Text:

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

10. Click **OK**.

Results: The field created using the syntax substring returns the first 9 characters of the contract ID field.

Note: Syntax for the command: SUBSTR(first character to be returned, last character to be returned).

Use an Expression as a Prompt

1. Go to the **Expressions** Tab.
2. Click the **Add Criteria** Icon for the Expression *SUBSTR(A.CNTRCT_ID,1,9)*
3. Choose the **condition type** *equal to* from the drop down menu

4. Click the radio button **Prompt**
5. Click the link [New Prompt](#)

Enter a Conditional Expression; IF-THEN-ELSE logic

1. Go to the **Expressions Tab**.
2. Click **Add Expression**.
3. Click on the **Expression Type** drop down menu and choose *character*.
4. In the **Length** field, enter the number of characters large enough to display the entire data string, 14.
5. Click in the **Expression Text Box**
6. Enter in the syntax values
`DECODE(A.FUND_CODE,'12060',A.PROJECT_ID,'NON- FEDERAL')`

Note: The logic for the DECODE expression is: If the first statement is true, FUND_CODE=12060, then return the value for the field PROJECT_ID, if not, return the words 'NON_FEDERAL'.

7. Click **OK**.
8. Click [Use as Field](#).

Results: The new field created will contain the value for PROJECT_ID for all contracts funded by 12060 and the words, NON-FEDERAL for all other fund sources.

Create an Expression to combine two fields

1. Go to the **Expressions Tab**.
2. Click **Add Expression**.
3. Click on the **Expression Type** drop down menu and choose *character*.

Note: When the function of concatenate is used, the resulting data type is always a character field.

4. In the **Length** field, enter the number of characters large enough to display the entire data string, 14.

5. Click in the **Expression Text** Box
6. Enter in the syntax values to join the fields A.CNTRCT_ID and A.PYMNT_TERMS_CD

Edit Expression Properties

'Expression Type: Character Length: 30

Aggregate Function Decimals:

Expression Text: A.CNTRCT_ID %CONCAT A.PYMNT_TERMS_CD

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

7. Click **OK**.
8. Click [Use as Field](#).

*Results: The field combines the values of two fields. Sample output: 03MIL0003AA045
03MIL0003AA is the contract number and 045 the negotiated payment terms.*

Create a date stamp for your query using an Expression

1. Create an expression with the following properties;
Expression
Type=character
Length=10
2. Click in the **Expression Text** Box
3. Enter in the syntax value *SYSDATE*

4. Click **OK**.
5. Click [Use as Field](#)

Results: A column has been added to the query which will contain the date the query is executed, SYSDATE is the system date.

Edit Prompt Properties

Field Name: <input type="text"/>	*Heading Type: Text <input type="button" value="v"/>
*Type: Character <input type="button" value="v"/>	Heading Text: <input type="text"/>
*Format: Upper <input type="button" value="v"/>	*Unique Prompt Name: BIND2
Length: <input type="text" value="11"/>	Prompt Table: <input type="text"/>
Decimals: <input type="text"/>	
*Edit Type: No Table Edit <input type="button" value="v"/>	
<input type="button" value="OK"/>	<input type="button" value="Cancel"/>

Note: Since the field referenced as a prompt is an expression, the Heading Text Box and the Field Name Box are blank. The substring expression was created and used to establish a prompt, but is not being used as a field, so will not display in the query results.

1. Fill in the **Heading Text** Box with the prompt text.
2. Click **OK**.
3. Click **Save** and name the query
4. Click **Return To Search**
5. Search for the query and run: click the [excel](#) hyperlink.

Results: Evaluate the data returned by the query.

Exercise 7: Independent Example

Scenario: Create a query to list purchase orders, the obligated and encumbered amount and the vouchers against them for a specified accounting date range.

Hint: *The purchase order encumbered amount is the monetary amount.*

Reference: *Financials Reporting Table Summary; EPM Data Dictionary*

Note: Prior to joining tables, the EPM Job Aid, Reporting Table Indexes and Join Criteria, must be checked to ensure the accuracy of the field joins suggested by the query manager tool. Not all auto joins are correct due to incompatibility between State business practice and the Peoplesoft product.

Exercise 8: Scheduling a Query

Resource: *EPM Job Aid, Scheduling Queries*

Navigation: EPM Reporting Tools > Query > Query Manager

1. Click [Advanced Search](#)
2. Click the **Folder** field
2. Type in *CLASS*
3. Click **Search**

Results: All tables/records that are located in the folder CLASS display.

4. Locate the query named **CLASS_VOUCHER**
5. Click the [Schedule](#) link to the right of the query name.

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

Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Schedule
<input type="checkbox"/>	CLASS_VOUCHER	Voucher Entry Status	Public	CLASS	Edit	HTML	Excel	Schedule
<input type="checkbox"/>	CLASS_VOUCHER_COUNT_BY_USERID	# of vouchers by operID	Public	CLASS	Edit	HTML	Excel	Schedule

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

6. Add a Run Control ID

Note: Run Control Id's in EPM do not set any parameters to limit the query return. Best practice dictates the query name be used as the run control ID for ease of re-use.

7. Enter a description of the query.

Note: Query description is a required field.

8. Enter values for the Run time Prompts.

Schedule Query

Run Control ID: EPM_FN_Q Report Manager Process Monitor

Query Name:

*Description:

Update Parameters

Prompt Name	Value
BUSINESS_UNIT	<input type="text" value="OSCM1"/>
ENTERED_DT	<input type="text" value="2023-11-09"/>
ENTERED_DT	<input type="text" value="2023-11-13"/>

9. Click **OK**.

10. Server Name drop down: **Mandatory Choice: PSUNX**

Result: The next step is to complete the Process Scheduler Page.

User ID COREPoppelJan Run Control ID EPM_FN_Q

Server Name PSUNX Run Date 04/11/2024

Recurrence Recurrence Run Time 11:26:00AM [Reset to Current Date/Time](#)

Time Zone EST Eastern Time (US)

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

11. In the **Format** Drop Down, select the desired output format *XLS*.

*Type	*Format
Web	XLS
	HTM
	PDF
	TXT
	XFORM
	XLS
	XML
	XMLP

12. Click **OK**.

13. Monitor the progress of the query.

Navigation: EPM People Tools>Process Scheduler>Process Monitor

View Process Requests

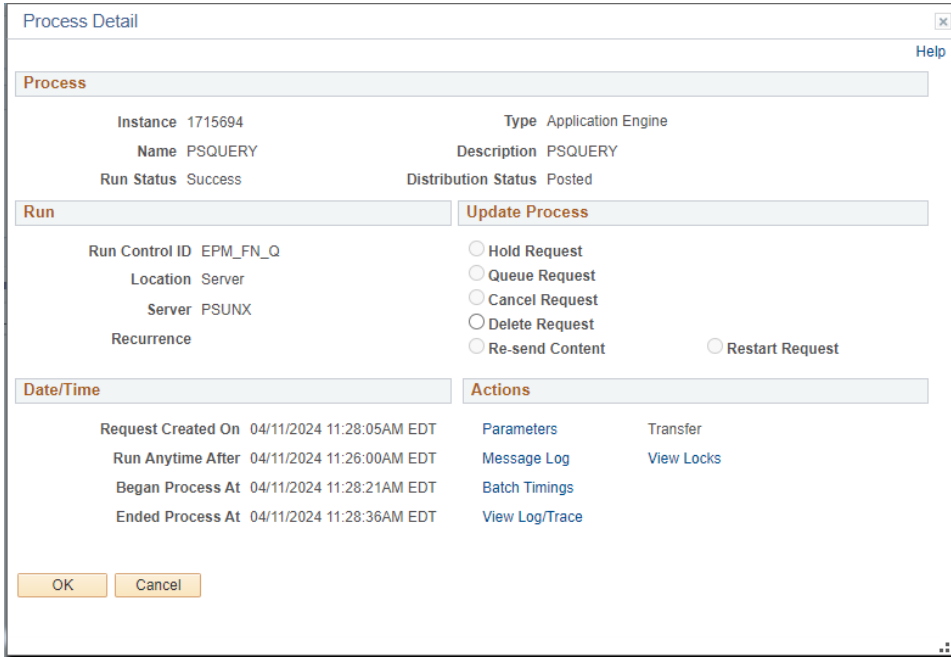
User ID COREPoppelJan Type Last 1 Days [Refresh](#)

Server Name Instance Range [Clear](#)

Run Status Distribution Status Save On Refresh [Report Manager](#) [Reset](#)

Process List											
Select	Instance	Seq.	Run Control ID	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	1715694		EPM_FN_Q	Application Engine	PSQUERY	COREPoppelJan	04/11/2024 11:26:00AM EDT	Success	Posted	Details	Actions

14. Upon a **Run Status** of **Success**, Click on [Details](#) link



15. Click on [View Log Trace](#), then the name of the query with the extension as expected (i.e., CLASS_VOUCHER-1715694.xlsx)

Results: Evaluate query results.

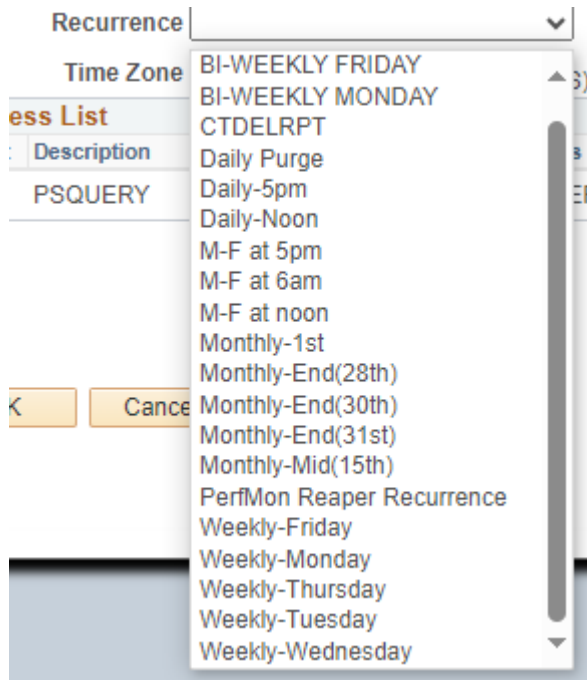
Note: Never schedule an untested query to run at the end of the work day. **Always** monitor your processes. If a schedule query is running for more than 20 minutes, click the radio button **Cancel Request** and re-evaluate your query design and/or parameters.

Additional Scheduling Functionality

Recurrence

Note: Recurring queries will run on a set schedule without manual intervention. The only dependency is the query must complete the prior run. Recurrences can be established for any query that does not require prompt value input.

Recurrence Options:



DO NOT USE: Daily Purge
PerfMon Reaper

These recurrence schedules are reserved for Core-CT Team use ONLY.

Distribution

Note: The distribution functionality allows the query results to be sent to anyone with an active CORE UserID. Results can be distributed to multiple users by adding a row for each UserID.

1. Click on the [Distribution](#) link.
2. Under Distribute To, click on the + sign to add a row
3. Choose **User** from the **ID Type** Drop Down
4. Enter in the *CORE UserID*.

The screenshot shows a software interface. At the top, there is a search bar. Below it is a text field labeled "Email Address List". Underneath is a blue header bar for a dialog box titled "Distribute To". The dialog box contains two rows of input fields. The first row has a dropdown menu set to "User" and a text field containing "COREJaciusBar". The second row has a dropdown menu set to "User" and an empty text field. A third dropdown menu is open, showing "Role" and "User" as options. At the bottom of the dialog box are "OK" and "Cancel" buttons.

5. Click **OK**.

Query Actions

Note: The **Action Drop Down Menu** Functionality can only be accessed from the query master list. These options are not available from the **Favorites List**.

1. Click in the **Select Box** to the left of the desired query name.
2. Click in the drop down **Action** menu box and select **Add to Favorites**
3. Click **Go** to perform the action.

Results: Selected query will always display on the page when you navigate to Query Manager.

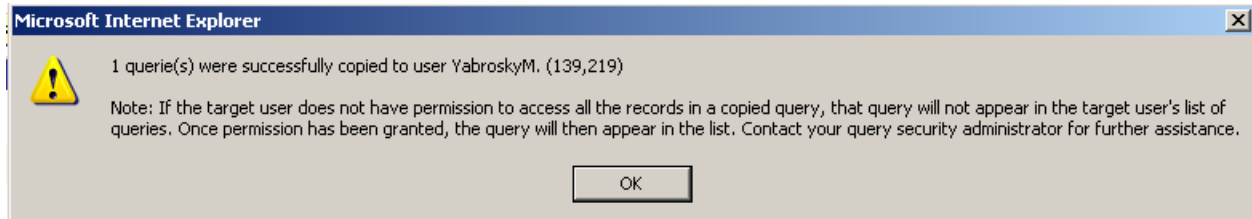
4. Click the **Uncheck All** button to deselect all checked queries from further action.
5. Repeat Steps 1 and 2 and select **Copy to User**

Results: Selected private query can be distributed to another CORE user by UserID. The caveat to this function is the recipient ID must have security access to the tables used in the query design.

6. Click **Go** to perform the action.
7. Enter the *Core-CT Userid*

8. Click **OK**.

Result: A message window will appear verifying the query was successfully copied or not.



9. Click **OK**.

10. Click the **Uncheck All** button to deselect all checked queries from further action.

11. Repeat Steps 1 and 2 and select **Delete Selected**

Results: Selected private query will be deleted.

Note: Be very careful with this operation. There is no list of queries selected for deletion generated. Once a query is deleted it cannot be recovered. There is no recycle bin.

12. Repeat Steps 1 through 4 using the **Move to Folder action**

Results: Select an existing folder, using the drop down list of available folders, or add a folder name of your choice to organize your queries in folders.

Note: All public queries deployed by the CORE-CT office are organized in folders by module.

13. Repeat Steps 1 through 4 using the **Rename Selected action**

Results: Rename changes the name of the query; it does not make a copy.