

Core-CT STARS Query Introduction

FN 101 AP/PO

Description

Pre-Requisites: Access to Core-CT AP/PO Financials tables used in this exercise.

These hands-on exercises are designed for STARS users to get familiar with a basic understanding of the concepts of Query Reporting in STARS.

These exercises focus on the following topics:

1. STARS Reference Materials and Training Tools
2. STARS Reporting Tools and Navigation
3. Establishing criteria, editing reports, report creation
4. Hands on Exercises

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Exercise 1: Data Dictionary

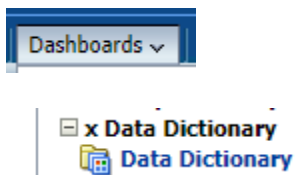
Scenario: Find all fields available in Financials Accounts Payable.

Skills: Locating a list of fields using the Data Dictionary

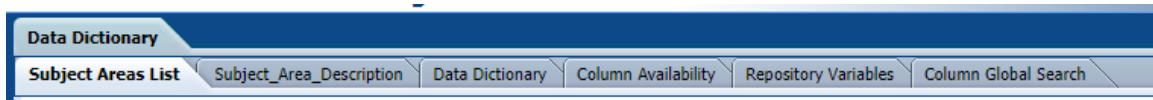
Reference: STARS Data Dictionary

Navigation: Core-CT > STARS > Dashboard > X Data Dictionary > Data Dictionary

1. In the Dashboard, locate and select the Data Dictionary page link



2. Click on links to further drill down to additional details and/or click on tab options to view different reports



CORE Groups	CORE Sub Groups	Subject Area	
Financials	Accounts Payable	Financials - AP Holds	
		Financials - AP Voucher Accounting	
		Financials - AP Voucher Line Distrib Details	
		Financials - AP Voucher XRef Payments	
	Accounts Receivable	Financials - AR Invoice Aging	
		Financials - AR Item	
		Financials - AR Item Activity	
		Financials - AR Item Billing	
		Financials - AR Item Distribution	
		Financials - AR Item Payments	
		Financials - AR Overview	
		Financials - AR Payments Direct Journals	
		Financials - AR Transactions	
		Assets	Financials - Asset Acquisition
			Financials - Asset Balance
			Financials - Asset Depreciation
	Financials - Asset Retirement		
	Budgetary Control	Financials - Budgetary Control - Detail Transactions	

Exercise 2: Run an Existing Report

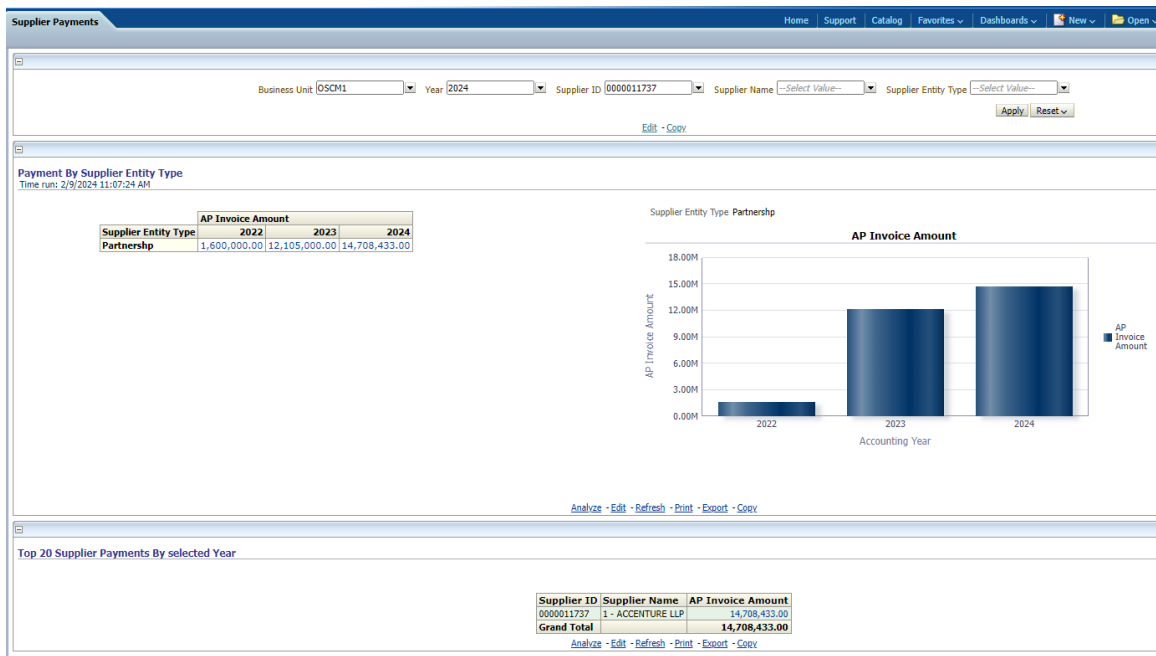
Scenario: Provide list of Agency payments to Accenture for the Year 2024.

Skills: Finding and Running an existing Report

Navigation: Core-CT > STARS > Dashboard > Accounts Payable > Supplier Payments

1. Select the Supplier Payments report
2. Enter the prompt values as follow:
Business Unit: Your agency's DEPT ID
Year: 2024.
Supplier ID: 0000011737
3. Click Apply

Results: The report will return all Agency payments made to Accenture during Year 2024.



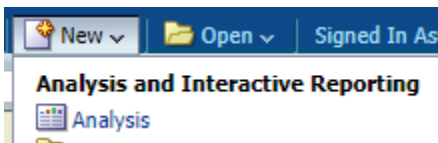
Exercise 3: Create a Payments Analysis

Scenario: Build an analysis to identify all payments to be made for a specified date range, identifying the remit to vendor.

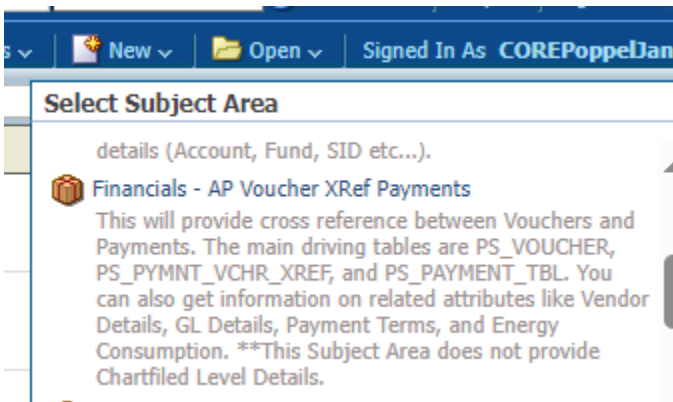
Skills: Creating an analysis, adding criteria, prompts

Navigation: Core-CT > STARS > New > Analysis and Interactive Reporting > Analysis

1. Select the Analysis menu option



2. On the Subject Area results displayed, select the Financials – AP Voucher XRef Payments link




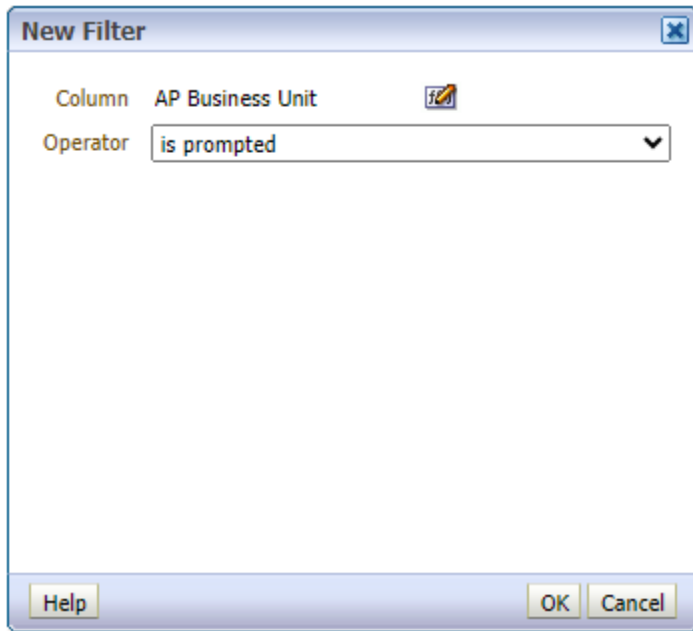
3. Within the listing of Subject Area fields, select the following fields by double-clicking on the field name to add to the report:


#	Folder	Field	EPM Field
1.	Business Unit	AP Business Unit	BUSINESS_UNIT
2.	AP Details	Voucher ID	VOUCHER_ID
3.	AP Details > Payment Due Date	Payment Due Fiscal Date	DUE_DT
4.	AP Details > Payment Voucher XRef	Payment ID	PYMNT_ID
5.		Payment Count	PYMNT_CNT
6.		Payment Selection Status	PYMNT_SELCT_STATUS

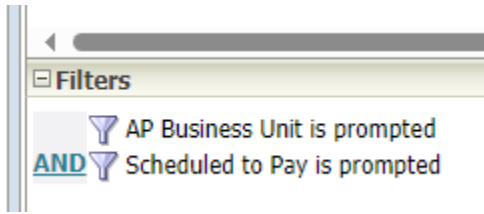
7.		Scheduled to Pay	SCHEДУLED_PAY_DT
8.	Supplier Details > Supplier Remit details	Remit Supplier	REMIT_VENDOR
9.		Remit Supplier Name	CT_VNDR_NAME1
10.	Supplier Details > Supplier Payment Default	Supplier Hold Payment	PYMNT_HOLD
11.	Facts – Voucher XRef	AP Total Payment Amount	PAID_AMT

Add Prompts

4. From the Criteria tab, select the Add filter icon 
5. Select AP Business Unit from the list
6. In the Operator drop-down, select is prompted

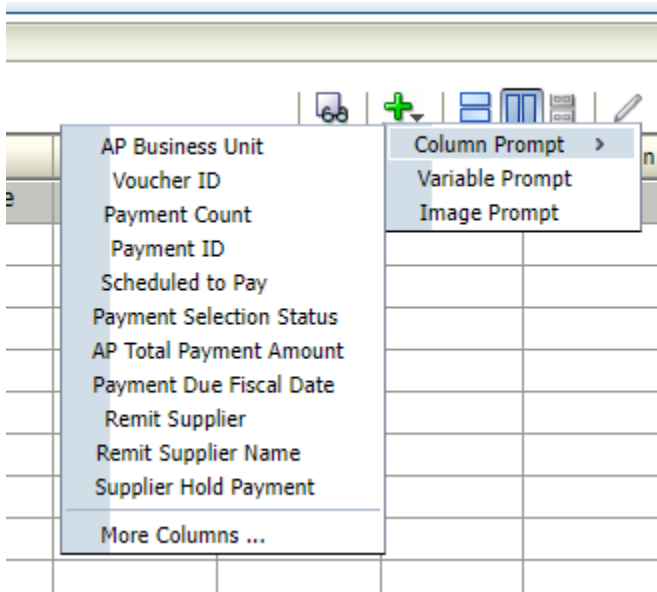


5. Click OK
6. Select the Add filter icon  a second time
7. Select Scheduled to Pay from the list
8. In the Operator drop-down, select is prompted
9. Click OK



10. Click on the Prompts tab (located in the upper-left hand area / on top)

11. Click on the add prompt icon and select Column Prompt > AP Business Unit



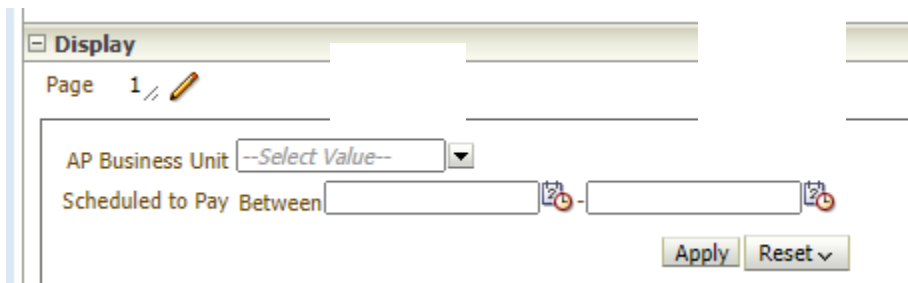
12. Click OK to accept the Operator is equal to / is in list default

13. Click on the add prompt icon and select Column Prompt > Scheduled to Pay

14. Select is between from Operator drop-down list

15. Click OK

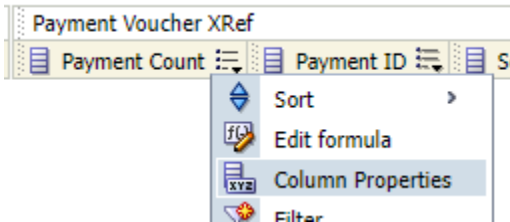
Note: Look at Display area to assure the prompts have been created correctly.



Note: When adding prompts: 1) create filters, 2) create prompts, and 3) run analysis through Catalog menu

Change column heading display and add an aggregate function

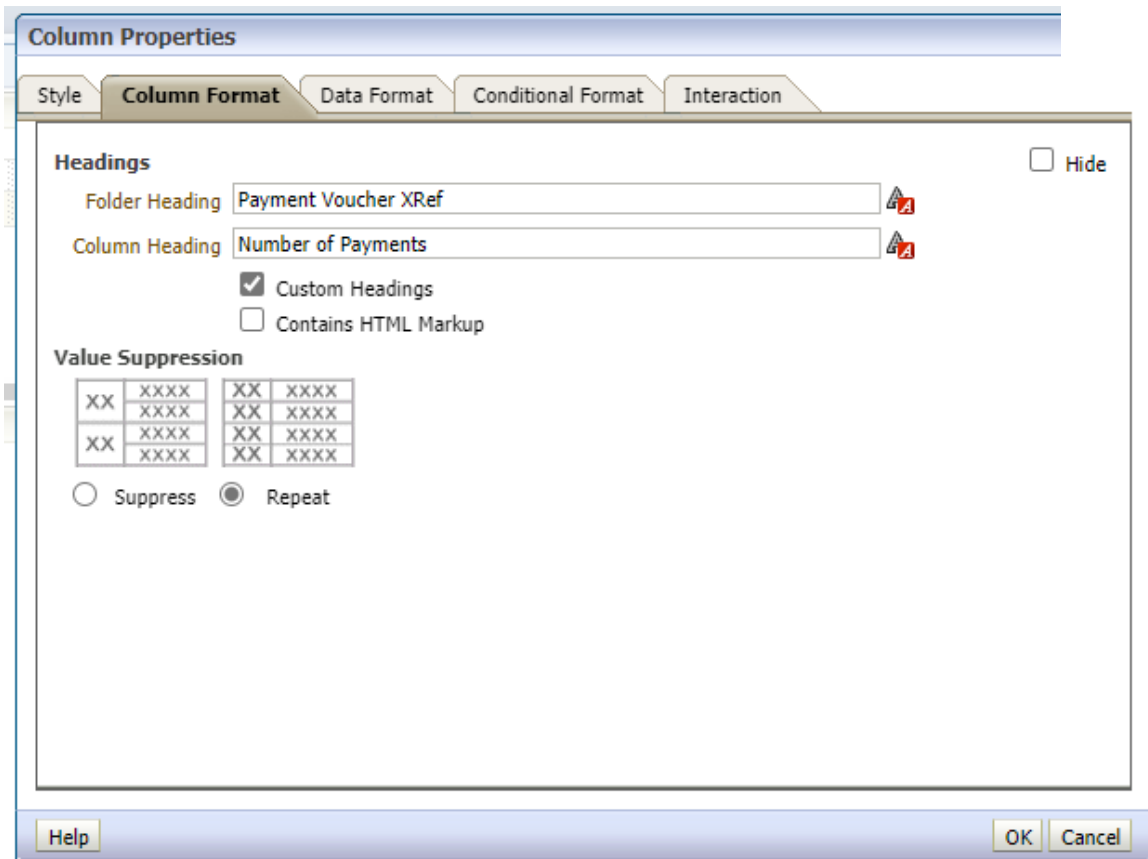
16. On the Criteria tab, select the drop-down on Payment Count column, and select Column Properties



17. Select the Column Format tab

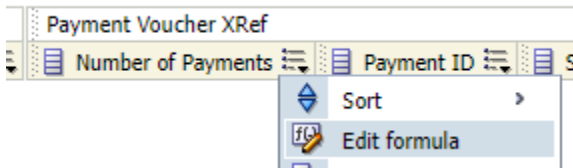
18. Check Custom Headings

19. Enter “Number of Payments” in the Column Heading

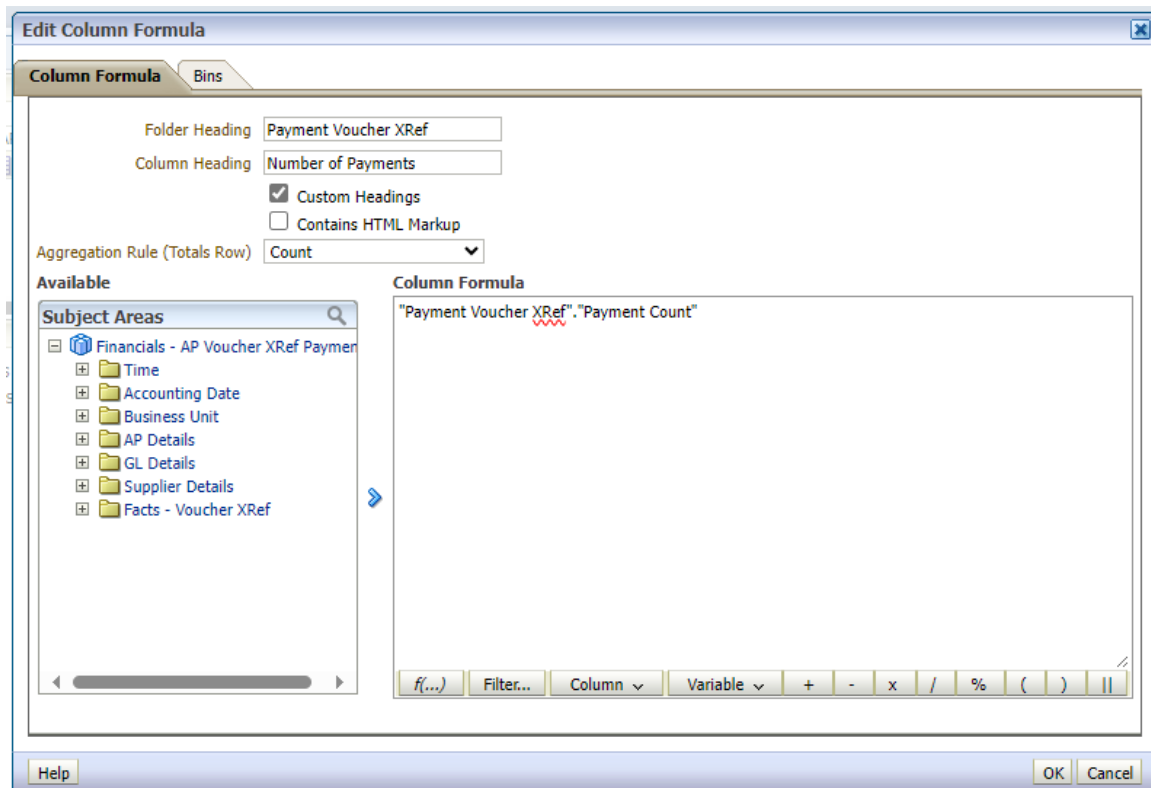


20. Select **OK**

21. On the Criteria tab, select the drop-down on Number of Payments column, and select Edit formula



22. Select Count from the Aggregation Rule (Totals Row)



23. Select **OK**

Review and Save

24. Click on **Save As** icon located in upper right-hand area

25. Select the folder to Save In, Name of Analysis, and Description

26. Click OK

Run Analysis

27. Return to the Catalog menu

28. Navigate to the folder where the Analysis was saved and click on the Open link



Payments Report | Last Modified 2/9/2024 3:09:47 PM | Owner COREPoppelJan
Return payments for selected Business Unit, Year, and within Scheduled Payment Date
[Open](#) | [Edit](#) | [More](#)▼

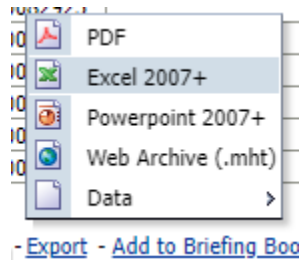
29. Enter Business Unit and from/to Schedule to Pay dates

30. Click OK

Results: Details from the analysis will display on the screen

Exercise 4: Export to Excel

1. Run Analysis
2. Click on Export link (at the bottom of the analysis)



3. Click on Excel 2007+
4. In the displayed downloads window, click on Save as, and navigate to folder of choice to save the Excel file
5. In the displayed Confirmation window, click OK