

EPM Queries

Job Aid

Running/Finding/Scheduling Queries
Downloading Query Results

Table of Contents

	Page
Running a Query	3
Finding a Query – Using the “begins with” Criteria	4
Finding a Query – Using the “Contains” Criteria	5
Finding a Query – Using the Wildcard (%) Symbol.....	7
Adding Queries to Your Favorites.....	9
Scheduling a New Query.....	10
Scheduling an Existing Query.....	17
Downloading Query Results to Excel.....	21

Running a Query

The estimated run time for this query is approximately 5 minutes. This query is available in HTML and Excel format.

1. Navigate to **EPM Reporting Tools > Query > Query Viewer**.
2. Enter the query's name in the **begins with** field and click **Search**.

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By: begins with

[Advanced Search](#)

3. You will see the query displayed in the **Search Results** list. Click the [HTML](#) or [Excel](#) link to run the query.

Search Results

Folder View:

Query							
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
DOTPC_001_PROJ_BD1_SUMMARY	DOT Project Budget Summary	Public	DOT_PROJECTS	HTML	Excel	Schedule	Favorite

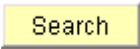
4. Enter the required report parameters and click **View Results**.

Example of Results page

	Project	Project Descr	Activity	Fund	Fund Descr	SID	SID Descr	Amount
1	DOT01702690CN	LOCAL BRG. INSP CHARGES	IN0000	12001	Transportation	12293	Highway & Bridge Renewal-2004	1989.140
2	DOT01702690CN	LOCAL BRG. INSP CHARGES	IN0000	12062	Transportatn Gr & Restrct Acct	21118	Advance Constructn-FHWA HWYAC	5333.333
3	DOT01702690CN	LOCAL BRG. INSP CHARGES	IN0000	12062	Transportatn Gr & Restrct Acct	22108	Hwy. Planning & Construction	2623.207
4	DOT01702690CN	LOCAL BRG. INSP CHARGES	SF0000	12001	Transportation	12293	Highway & Bridge Renewal-2004	241460.880
5	DOT01702690CN	LOCAL BRG. INSP CHARGES	SF0000	12062	Transportatn Gr & Restrct Acct	21118	Advance Constructn-FHWA HWYAC	474666.667
6	DOT01702690CN	LOCAL BRG. INSP CHARGES	SF0000	12062	Transportatn Gr & Restrct Acct	22108	Hwy. Planning & Construction	488302.753

Finding a Query – Using the “begins with” Criteria

It is recommended you use this procedure to find a query when you know the entire query name or the beginning of the query name.

1. Navigate to **EPM Reporting Tools > Query > Query Viewer**.
2. Enter the query name in the **begins with field** and click .

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By: begins with

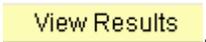
 [Advanced Search](#)

3. You will see the query displayed in the **Search Results** list. Click the [HTML](#) or [Excel](#) link to run the query.

Search Results

Folder View:

Query							
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
DOTPC_001_PROJ_BD1_SUMMARY	DOT Project Budget Summary	Public	DOT_PROJECTS	HTML	Excel	Schedule	Favorite

4. Enter the required report parameters and click .

Finding a Query – Using the “Contains” Criteria

It is recommended you use this procedure to find a query when you know part of the query name.

1. Navigate to **EPM Reporting Tools > Query > Query Viewer**.
2. Click the [Advanced Search](#) link.

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By: begins with

[Advanced Search](#)

3. Enter part of the query name and Click .

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

Query Name:	<input type="text" value="contains"/>	<input type="text" value="BD1_SUMMARY"/>
Description:	<input type="text"/>	<input type="text"/>
Uses Record Name:	<input type="text"/>	<input type="text"/>
Uses Field Name:	<input type="text"/>	<input type="text"/>
Access Group Name:	<input type="text"/>	<input type="text"/>
Folder Name:	<input type="text"/>	<input type="text"/>
*Query Type:	<input type="text" value="User"/>	<input type="text"/>
Owner:	<input type="text"/>	<input type="text"/>

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

[Basic Search](#)

4. Click the drop-down arrow in the **Query Name** field and select **contains**.
5. You will see the query displayed in the **Search Results** list. Click the [HTML](#) or [Excel](#) link to run the query.

Search Results							
Folder View: -- All Folders --							
Query							
Customize Find View All  First 1 of 1 Last							
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
DOTPC_001_PROJ_BD1_SUMMARY	DOT Project Budget Summary	Public	DOT_PROJECTS	HTML	Excel	Schedule	Favorite

Finding a Query – Using the Wildcard (%) Symbol

It is recommended you use this procedure when you know part of the query name.

1. Navigate to **EPM Reporting Tools > Query > Query Viewer**.
2. Click the [Advanced Search](#) link.

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By: begins with

[Advanced Search](#)

3. Click the drop-down arrow in the **Query Name** field and select **contains**.
4. Enter any part of the query name using the **% wildcards** and click .

To find a query with any number of characters preceding and following the query name you entered, you must enter the **wildcard** before and after the query name.

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

Query Name:	<input type="text" value="contains"/> <input type="button" value="v"/>	<input type="text" value="%BD1%"/>
Description:	<input type="text"/>	<input type="text"/>
Uses Record Name:	<input type="text"/>	<input type="text"/>
Uses Field Name:	<input type="text"/>	<input type="text"/>
Access Group Name:	<input type="text"/>	<input type="text"/>
Folder Name:	<input type="text"/>	<input type="text"/>
*Query Type:	<input "="" type="text" value="="/>	<input type="text" value="User"/> <input type="button" value="v"/>
Owner:	<input "="" type="text" value="="/>	<input type="text"/>

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

[Basic Search](#)

5. You will see the query displayed in the **Search Results** list. Click the [HTML](#) or [Excel](#) link to run the query.

Search Results

Folder View:

Query							
Customize Find View All  First <input type="text" value="1 of 1"/> Last							
<u>Query Name</u>	<u>Description</u>	<u>Owner</u>	<u>Folder</u>	<u>Run to HTML</u>	<u>Run to Excel</u>	<u>Schedule</u>	<u>Add to Favorites</u>
DOT_PC_BD1_SUMMARY	DOT Budget Summary	Public	DOT_PROJECTS	HTML	Excel	Schedule	Favorite

Adding Queries to Your Favorites

Adding queries to your **Favorites** eliminates the need to search for the query. Your **Favorite** queries will display on the main Query Viewer page.

1. Navigate to **EPM Reporting Tools > Query > Query Viewer**.
2. Enter the query name in the **begins with field** and click .

Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

***Search By:** begins with

[Advanced Search](#)

3. You will see the query displayed in the **Search Results** list. Click the [Favorite](#) link located under the Add to Favorites column.

Search Results

Folder View:

Query							
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Add to Favorites
DOTPC_001_PROJ_BD1_SUMMARY	DOT Project Budget Summary	Public	DOT_PROJECTS	HTML	Excel	Schedule	Favorite

4. The query will appear in your **Favorites**.

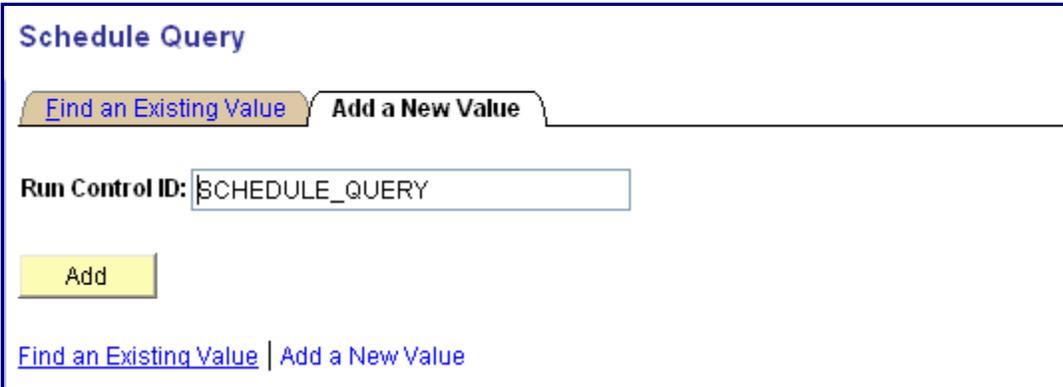
My Favorite Queries

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Schedule	Remove
PC_PROJECT_MANAGER		Private		HTML	Excel	Schedule	<input type="button" value="-"/>
CT_CCC_HR_HR_POS_EE	EE, Position, Chartfield Data	Public		HTML	Excel	Schedule	<input type="button" value="-"/>
DOTPC_001_PROJ_BD1_SUMMARY	DOT Project Budget Summary	Public	DOT_PROJECTS	HTML	Excel	Schedule	<input type="button" value="-"/>

Scheduling a New Query

1. Navigate to **EPM Reporting Tools > Query > Schedule Query**.
2. Click the **Add a New Value** tab.
3. Enter a unique name for the Run Control ID and Click  .

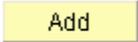
Do not use spaces in the Run Control ID. Underscores are permissible.



Schedule Query

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

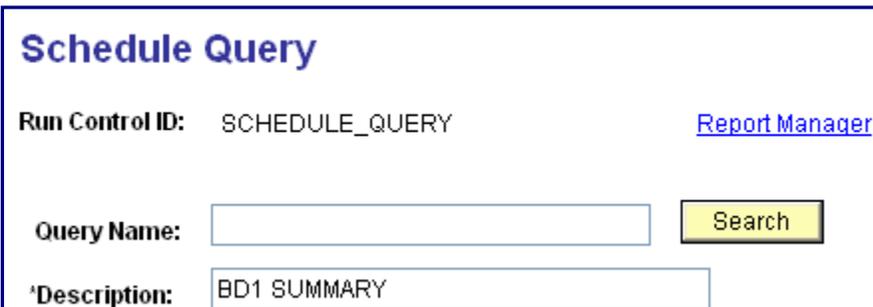
Run Control ID:



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

The **Schedule Query** page appears.

4. Enter the query description in the **Description:** field. This is a required field.



Schedule Query

Run Control ID: SCHEDULE_QUERY [Report Manager](#)

Query Name: 

Description:

5. Type the query name in the **Query Name:** field or click to obtain a list of all available queries.

The **Scheduled Query Search Page** appears.

6. Type the query name or part of the query name and click .
7. Click on the query name link.

Scheduled Query Search Page

Query Type: ▼

Query:

Query	Description	Access
DOTPC_001_PROJ_BD1_SUMMARY	DOT Project Budget Summary	Public

8. Enter the required report parameter(s) requested and click .

Project: 🔍

The updated parameters will appear under Value on the Schedule Query page.

- Click .

Schedule Query

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

Query Name:

Description:

[Update Parameters](#)

Prompt Name	Value
PROJECT_ID	<input type="text" value="DOT01702690CN"/>

- If desired, modify the ***Format** of the results, i. e., XLS for Excel.

Server Name should remain blank. This will allow the system to access the next available server.

- Click the **Recurrence** drop-down arrow and select the desired recurrence.

Process Scheduler Request

User ID: JonesWan Run Control ID: SCHEDULE_QUERY

Server Name: Run Date:

Recurrence: Run Time:

Time Zone:

Process List	Process Name	Process Type	Type	Format	Distribution				
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Select</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>PSQUERY</td> </tr> </tbody> </table>	Select	Description	<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web	<input type="text" value="XLS"/>	Distribution
Select	Description								
<input checked="" type="checkbox"/>	PSQUERY								

12. Click **OK** to return to the **Schedule Query** page.

A **Process Instance** number has been assigned to your request. If desired, make note of this number.

13. Click [Process Monitor](#).

Schedule Query

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

Process Instance: 214473

Query Name: **Search**

Description:

[Update Parameters](#)

Prompt Name	Value
PROJECT_ID	<input type="text" value="DOT01702690CN"/>

Save **Add** **Update/Display**

The Scheduled Query will appear in the Process List with the recurrence symbol.

Select	Instance	Seq.	Process Type	Process Name	User	Run DateTime	Run Status	Distribution Status	Details
<input type="checkbox"/>	214479		Application Engine	PSQUERY 	JonesWan	04/18/2008 5:00:00PM EDT	Queued	N/A	Details
<input type="checkbox"/>	214473		Application Engine	PSQUERY	JonesWan	04/18/2008 12:45:30PM EDT	Success	Posted	Details
<input type="checkbox"/>	214436		Application Engine	PSQUERY	JonesWan	04/18/2008 11:02:55AM EDT	Success	Posted	Details

14. Click **Refresh** until the **Run Status** displays **Success** and the **Distribution Status** displays **Posted**.

15. Click the [Details](#) link.

17. Click the appropriate link to access your report (either .csv or .xls).

View Log/Trace

Report

Report ID: 248937 **Process Instance:** 214473 [Message Log](#)
Name: PSQUERY **Process Type:** Application Engine
Run Status: Success

DOT Project Budget Summary

Distribution Details

Distribution Node: PRODRPTFTP **Expiration Date:**

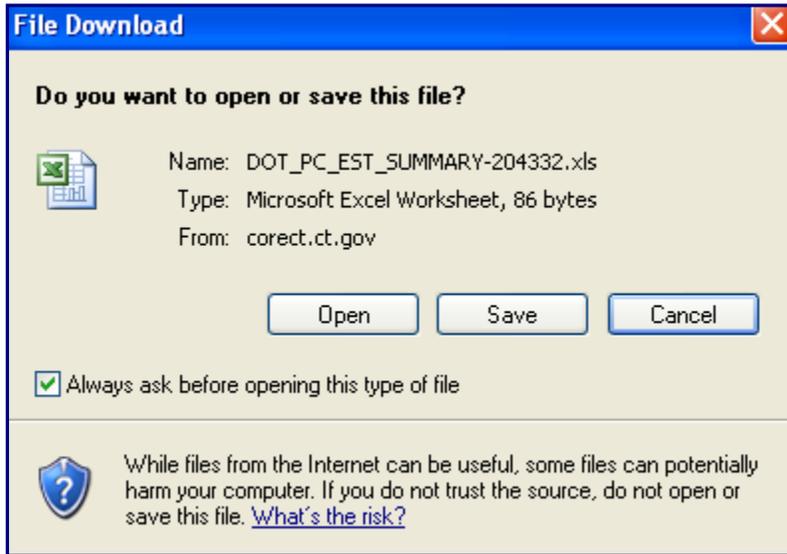
File List

<u>Name</u>	<u>File Size (bytes)</u>	<u>Datetime Created</u>
AE_PSQUERY_214473.log	153	04/18/2008 12:48:07.000000PM EDT
DOTPC_001_PROJ_BD1_SUMMARY-214473.xls	10,752	04/18/2008 12:48:07.000000PM EDT

Distribute To

<u>Distribution ID Type</u>	<u>Distribution ID</u>
User	JonesWan

18. When prompted to Open or Save the report, click **Open**.

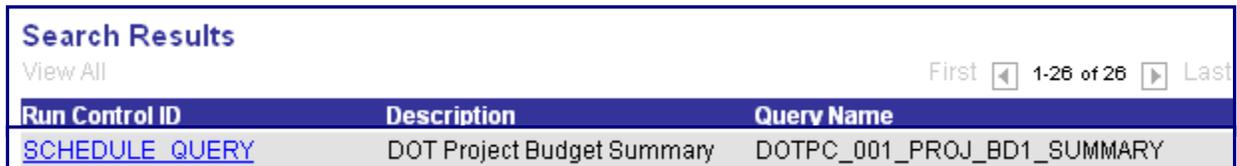


The results will be displayed as follows.

	A	B	C	D	E	F	G	H
1	DOT Project Budget Su	6						
2	Project = DOT01702690CN							
3	Project	Project Descr	Activity	Fund	Fund Descr	SID	SID Descr	Amount
4	DOT01702690CN	LOCAL BRG. INSP CHARGES	IN0000	12001	Transportation	12293	Highway & Bridge Renewal-2004	1989.140
5	DOT01702690CN	LOCAL BRG. INSP CHARGES	IN0000	12062	Transportatn Gr & Restrct Acct	21118	Advance Constructn-FHWA HWYAC	5333.333
6	DOT01702690CN	LOCAL BRG. INSP CHARGES	IN0000	12062	Transportatn Gr & Restrct Acct	22108	Hwy. Planning & Construction	2623.207
7	DOT01702690CN	LOCAL BRG. INSP CHARGES	SF0000	12001	Transportation	12293	Highway & Bridge Renewal-2004	241460.880
8	DOT01702690CN	LOCAL BRG. INSP CHARGES	SF0000	12062	Transportatn Gr & Restrct Acct	21118	Advance Constructn-FHWA HWYAC	474666.667
9	DOT01702690CN	LOCAL BRG. INSP CHARGES	SF0000	12062	Transportatn Gr & Restrct Acct	22108	Hwy. Planning & Construction	488302.753

Scheduling an Existing Query

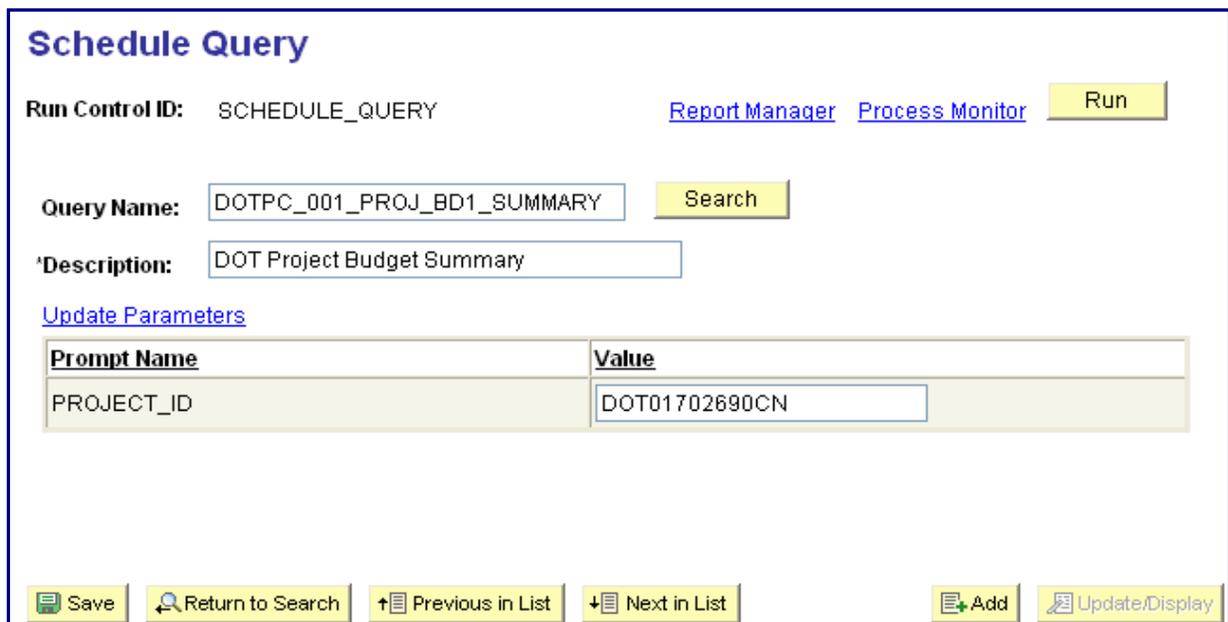
1. Navigate to **EPM Reporting Tools > Query > Schedule Query**.
2. Click **Search** to view your scheduled queries.
3. Click the query name link.



Run Control ID	Description	Query Name
SCHEDULE_QUERY	DOT Project Budget Summary	DOTPC_001_PROJ_BD1_SUMMARY

The Schedule Query page appears.

4. To modify the existing report parameter(s) click the [Update Parameters](#) link.



Schedule Query

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

Query Name: **Search**

Description:

[Update Parameters](#)

Prompt Name	Value
PROJECT_ID	<input type="text" value="DOT01702690CN"/>

Save **Return to Search** **Previous in List** **Next in List** **Add** **Update/Display**

5. Enter the required report parameter(s) requested and click **OK** to return to the **Schedule Query** page.
6. Click **Run**.

- If desired, modify the ***Format** of the results, i. e., XLS for Excel.

Server Name should remain blank. This will allow the system to access the next available server.

- Click the **Recurrence** drop-down arrow and select the desired recurrence.

Process Scheduler Request

User ID: JonesWan Run Control ID: SCHEDULE_QUERY

Server Name: PSUNX Run Date: 04/18/2008 [Reset to Current Date/Time](#)

Recurrence: Run Time: 1:09:37PM

Time Zone: [Process List](#)

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

OK Cancel

- Click [OK](#).

A **Process Instance** number has been assigned to your request. If desired, make note of this number.

- Click [Process Monitor](#).

Schedule Query

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

Process Instance: 204332

Query Name: DOT_PC_EST_SUMMARY [Search](#)

Description: DOT Estimate Summary

[Update Parameters](#)

Prompt Name	Value
PROJECT_ID	DOT01700555PE

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

11. Click **Refresh** until the **Run Status** displays **Success** and the **Distribution Status** displays **Posted**.
12. Click the [Details](#) link.

The screenshot shows the 'Process List' interface. At the top, there are tabs for 'Process List' and 'Server List'. Below the tabs is a search and filter section with fields for 'User ID' (JonesWan), 'Type', 'Last' (3 Days), 'Server', 'Name', 'Instance', 'Run Status', and 'Distribution Status'. A 'Refresh' button is highlighted in yellow. Below this is a table with the following data:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	214473		Application Engine	PSQUERY	JonesWan	04/18/2008 12:45:30PM EDT	Success	Posted	Details
<input type="checkbox"/>	214436		Application Engine	PSQUERY	JonesWan	04/18/2008 11:02:55AM EDT	Success	Posted	Details

13. Click the [View Log/Trace](#) link.

The screenshot shows the 'Process Detail' interface. It is divided into several sections:

- Process:** Instance: 214479, Type: Application Engine, Name: PSQUERY, Description: PSQUERY, Run Status: Queued, Distribution Status: N/A.
- Run:** Run Control ID: SCHEDULE_QUERY, Location: Server, Server: PSUNX, Recurrence: Daily-5pm.
- Update Process:** Hold Request, Queue Request, Cancel Request, Delete Request, Restart Request.
- Date/Time:** Request Created On: 04/18/2008 1:19:16PM EDT, Run Anytime After: 04/18/2008 5:00:00PM EDT, Began Process At: , Ended Process At: .
- Actions:** Parameters, Transfer, Message Log, View Locks, Batch Timings, View Log/Trace.

At the bottom, there are 'OK' and 'Cancel' buttons.

14. Click the appropriate link to access your report (either .csv or .xls).

View Log/Trace

Report

Report ID: 248937 **Process Instance:** 214473 [Message Log](#)
Name: PSQUERY **Process Type:** Application Engine
Run Status: Success

DOT Project Budget Summary

Distribution Details

Distribution Node: PRODRPTFTP **Expiration Date:** 05/23/2009

File List

Name	File Size (bytes)	Datetime Created
AE_PSQUERY_214473.log	153	04/18/2008 12:48:07.000000PM EDT
DOTPC_001_PROJ_BD1_SUMMARY-214473.xls	10,752	04/18/2008 12:48:07.000000PM EDT

Distribute To

Distribution ID Type	Distribution ID
User	JonesWan

[Return](#)

15. When prompted to Open or Save the report, click **Open**.

File Download

Do you want to open or save this file?

 Name: DOT_PC_EST_SUMMARY-204332.xls
Type: Microsoft Excel Worksheet, 86 bytes
From: corect.ct.gov

Always ask before opening this type of file

 While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

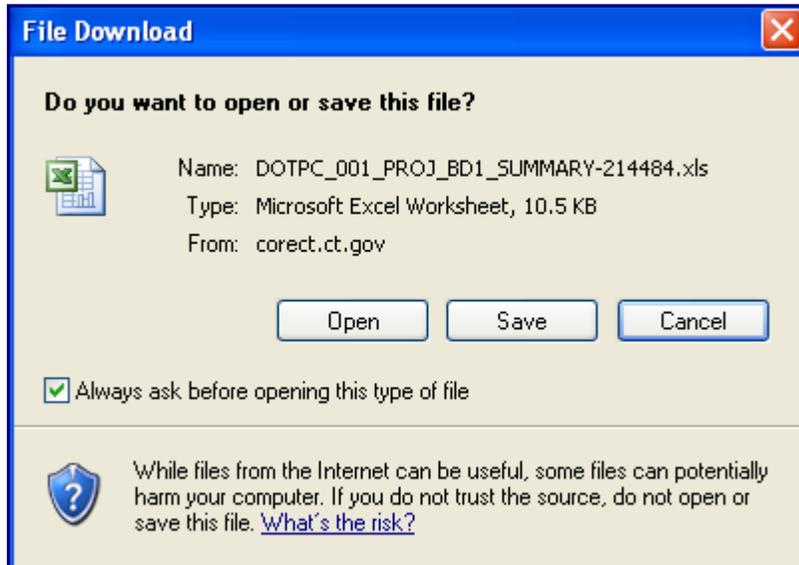
The results will be displayed as follows.

	A	B	C	D	E	F	G	H
1	DOT Project Budget Su	6						
2	Project = DOT01702690CN							
3	Project	Project Descr	Activity	Fund	Fund Descr	SID	SID Descr	Amount
4	DOT01702690CN	LOCAL BRG. INSP CHARGES	IND000	12001	Transportation	12293	Highway & Bridge Renewal-2004	1989.140
5	DOT01702690CN	LOCAL BRG. INSP CHARGES	IND000	12062	Transportatn Gr & Restrct Acct	21118	Advance Constructn-FHWA HWYAC	5333.333
6	DOT01702690CN	LOCAL BRG. INSP CHARGES	IND000	12062	Transportatn Gr & Restrct Acct	22108	Hwy. Planning & Construction	2623.207
7	DOT01702690CN	LOCAL BRG. INSP CHARGES	SF0000	12001	Transportation	12293	Highway & Bridge Renewal-2004	241460.880
8	DOT01702690CN	LOCAL BRG. INSP CHARGES	SF0000	12062	Transportatn Gr & Restrct Acct	21118	Advance Constructn-FHWA HWYAC	474666.667
9	DOT01702690CN	LOCAL BRG. INSP CHARGES	SF0000	12062	Transportatn Gr & Restrct Acct	22108	Hwy. Planning & Construction	488302.753

Downloading Query Results to Excel

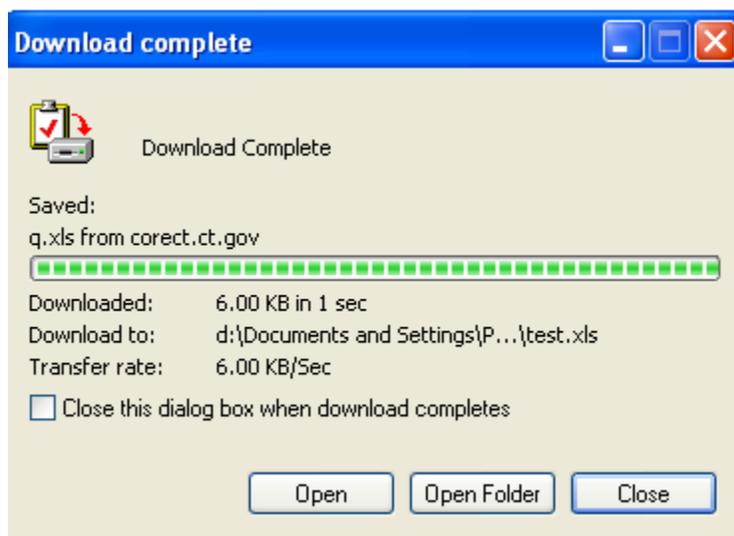
After running the query, you will be prompted to Open or Save the report.

1. Click **Save** to save the report as an excel file in the location of your choice.



Clicking Open **will not** save the report as an Excel file. It will open the file in HTML format and you will then need to save it as an Excel file.

2. After the download is complete, click **Open** to view the file in Excel.



Example of Results page

Project	Project Descr	Activity	Fund	Fund Descr	SID	SID Descr	Amount
DOT01700555PE	STATEWIDE; DEPT CADD PROGRAM	PE0000	12001	Transportation	12293	Highway & Bridge Renewal-2004	372747.720