



EPM Query Maintenance

Skills: Add to favorites, Copy to User, Delete Selected, Move to Folder, Rename Selected

Navigation: Core-CT EPM > Reporting Tools > Query > Query Manager

Query Manager

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

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

*Search By begins with

[Advanced Search](#)

Search Results Too many items met your search criteria. Only the first 300 items displayed.

*Folder View

Action

-- Choose --
Add to Favorites
Copy to User
Delete Selected
Move to Folder
Rename Selected

Query					Person		First		1-30 of 300		Last
Select	Query Name	Descr			It	Run to HTML	Run to Excel	Run to XML	Schedule		
☐	CT_CORE_AGY_CNTRCT_ID_ROLE	CORE Rolename by ID for Dept	Public	DPH	Edit	HTML	Excel	XML	Schedule		
☐	CT_CORE_AGY_CNTRCT_ROLE_ID	CORE ID BY Rolename for Dept	Public	DPH	Edit	HTML	Excel	XML	Schedule		
☐	CT_CORE_AP_TELECM_AFTER_7_2011	Telecomm Expenditures	Public	AP	Edit	HTML	Excel	XML	Schedule		
☐	CT_CORE_AP_TELECM_PRIOR_7_2011	Telecomm Expenditures	Public	AP	Edit	HTML	Excel	XML	Schedule		
☐	CT_CORE_AR_DEPT_DPOSIT_IDS	Deposit Ids by Fund SID, FY	Public	AR	Edit	HTML	Excel	XML	Schedule		

Contents

To add a query to My Favorite Queries.....	2
To copy a private query to another user	3
To delete a private query	4
To move a query to a designated folder.....	5
To rename a private query.....	6



To add a query to My Favorite Queries

1. Select the box to the left of the query name
2. Select the action button drop down menu located near the middle of the top of the page and choose **Add to Favorites**.
3. Select **Go**.
4. The selected query will go directly to the on-screen list of favorite queries. To remove, just select the minus (-) button on the right of the query name.

Query Manager

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

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

*Search By begins with
 [Advanced Search](#)

Search Results

*Folder View

*Action

Query										Personalize	Find	View All	First	1 of 1	Last
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule						
☒	CT_CORE_FIN_PO_BAL_ALL_PO	All PO Bal w/ or w/o Vouchers	Public	PO	Edit	HTML	Excel	XML	Schedule						

My Favorite Queries

My Favorite Queries										Personalize	Find	View All	First	1-2 of 2	Last
Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	Remove						
BAA_FIN_PO_CONTRACT_ACCTG	Contract information	Private	PO	Edit	HTML	Excel	XML	Schedule	-						
CT_CORE_FIN_PO_BAL_ALL_PO	All PO Bal w/ or w/o Vouchers	Public	PO	Edit	HTML	Excel	XML	Schedule	-						



To copy a private query to another user

1. Select the box(es) to the left of the private query name(s)
2. Select the action button drop down menu located near the middle of the top of the page and choose **Copy to User**.
3. Select **Go**.

Query Manager

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

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

*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

*Action

Query									
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
☒	2016_CONTRACTS		Private		Edit	HTML	Excel	XML	Schedule

4. Enter the person's CORE UserID and select **OK**. Upon successful copy, the sender will receive a message indicating that the query had been successfully copied to another user. The sender will then need to notify the recipient.

Help

Enter the user id to copy the selected queries to:

User ID:



Message

1 query(s) were successfully copied to user [redacted] (139,219)

Note: If the target user does not have permission to access all the records in a copied query, that query will not appear in the target user's list of queries. Once permission has been granted, the query will then appear in the list. Contact your query security administrator for further assistance.



Note: The recipient of the query must have the appropriate security access to be able to view and run the query.

To delete a private query

1. Select the box(es) to the left of the private query name(s)
2. Select the action button drop down menu located near the middle of the top of the page and choose **Delete Selected**.
3. Select **Go**.

Query Manager

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

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

*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

*Action

Query									
Personalize Find View All First 1 of 1 Last									
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
☒	JGCLASS_VCHR_TRANS		Private		Edit	HTML	Excel	XML	Schedule



4. A warning/confirmation screen will appear verifying the deletion of the selected query. Select **yes**, only when validated deletion is the action you wish to perform.

Message

Confirm the permanent deletion of all selected queries? (139,191)

To move a query to a designated folder

1. Select the box(es) to the left of the private query name(s)
2. Select the action button drop down menu located near the middle of the top of the page and choose **Move to Folder**.
3. Select **Go**.

Query Manager

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

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

*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

*Action

Query	Personalize	Find	View All	First	1 of 1	Last																				
<table border="1"> <thead> <tr> <th>Select</th> <th>Query Name</th> <th>Descr</th> <th>Owner</th> <th>Folder</th> <th>Edit</th> <th>Run to HTML</th> <th>Run to Excel</th> <th>Run to XML</th> <th>Schedule</th> </tr> </thead> <tbody> <tr> <td>☒</td> <td>JGCLASS_VCHR_TRANS</td> <td></td> <td>Private</td> <td></td> <td>Edit</td> <td>HTML</td> <td>Excel</td> <td>XML</td> <td>Schedule</td> </tr> </tbody> </table>	Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule	☒	JGCLASS_VCHR_TRANS		Private		Edit	HTML	Excel	XML	Schedule						
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule																	
☒	JGCLASS_VCHR_TRANS		Private		Edit	HTML	Excel	XML	Schedule																	



4. Select an existing folder option by selecting the drop down menu to see a list of available folders. Or enter a folder name of your choice. Select **OK**. Query has been moved to a folder for ease of search.

Move to Folder

Select an existing folder to move to:

☒ -- All Folders --

OR enter a folder name to move to:

☐

To rename a private query

1. Select the box to the left of the private query name
2. Select the action button drop down menu located near the middle of the top of the page and choose **Rename Selected**.
3. Select **Go**.

Query Manager

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

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

*Search By begins with
 [Advanced Search](#)

Search Results

*Folder View

*Action

Query									
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
☒	JGCLASS_VCHR_TRANS		Private		Edit	HTML	Excel	XML	Schedule



4. Enter the new query name in the box and select **OK**. The query has been renamed.

Rename Queries

Enter new names for the queries on the right.

Rename Queries			Personalize Find	First 1 of 1 Last
Query Name	Owner	New Name		
JGCLASS_VCHR_TRANS	Private			

Note: Renaming a query does not create a copy but rather actually changes the name of the existing query.