

# Personnel Query Reporting 2010a User Manual

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# **Table of Contents**

INTRODUCTION	4
TYPES OF REPORT:	4
Reporting Windows	
OueryBuster	
$\widetilde{U}$ ser Defined Reporting	4
PERSONNEL QUERIES (REPORTING)	5
CREATING A LIBRARY	7
Add a Library	7
CREATE A QUERY	
AVAILABILITY TABLES: window one	
DEFINE RELATIONSHIP BUTTON	
INNER JOIN and OUTER JOIN	
SELECTED COLUMNS:	
DEFINE SELECTED COLUMNS – WHERE:	
Add / OR Buttons	
Test and Run Query Buttons	
Count Of	
Group By	
SAVING QUERIES	
View / Open a Saved Query	
SAVE AS - DUPLICATE AMENDED QUERIES	
OPENING EXISTING QUERIES	
Printing & Exporting Facilities from the Brown Cupboara	
How to Modify Column Layoul	
How to Frini a Report	
How to Sand to MS Excel	
How to send data to CSV files	34
How to return to Factory Settings	
QUERY MANAGER	
	26
SETTING UP THE LIBRARIES	
Add a Llopa Jordan y	
July the Department to the Query Library	
Linking the Department to the Query Library	50 مربع 17
Query Heading to Long	
Withdrawal Published Query form Library	
QUERY BUSTERS	
RUNNING OUERIES	15
Query Window	
Verifying a Query is Correctly Formed	
Reasons That A Query is Correctly Torneculture	
TO DEFINE THE OUERY FURTHER	50
And / OR	53
Saving and Opening a Saved Ouery	55
Delete, Duplicate, Rename a Saved Query	
AUTOMATIC QUERIES	
Setting-Up Automatic Queries	
Retrieving Automatic Oueries	
RETRIEVING RESULTS OF AUTOMATIC QUERIES	
Reference Date Functionality	
· · · · · · · · · · · · · · · · · · ·	

# Introduction

The level of detail needed when entering data into pharOS means that the information available is very comprehensive. Reports can be as simple or complex as necessary. This manual gives the user the tools to interrogate the database and save commonly-used Queries.

# Types of Report:

There are 3 levels of reporting within pharOS.

#### **Reporting Windows**

There are standard windows which provide reports to be run with little or no user intervention. At the most basic level a reporting window would load, for example, all personnel who are due for a medical.

Most windows however will allow for search criteria to be entered in order to restrict the results. These generally include a date range, and may include options to restrict location, rank, post type (ie Whole Time, Retained, APTC) or service number/person's name. This type of report is always specific to the individual modules and will be covered in detail in the corresponding manuals.

#### QueryBuster

This is the next level in complexity, which also means greater flexibility. Query Busters are standard reports that are published by SOPHTLOGIC. The fields and search criteria can be defined by the user.

## **User Defined Reporting**

This offers the greatest flexibility, but requires a higher level of competency. Reports have to be generated by choosing the tables, fields and search criteria.

# Personnel Queries (Reporting)

This option allows the user to build user defined reports. This is a very powerful tool, but requires an understanding of how the database is made up.

- Click onto the Personnel
- Scroll down to Reports
- Click onto Personnel Queries



The Personnel Queries window will appear

As you can see you have three windows

🚷 Personnel queries - Untitled			
Clear 🛇 Open 📂 Save 🔛 Save as 🔛	Access 🗧 View SQL 🖇 🔻 🔺		
Available fields	Select columns	Add 🚚	
🔍 General 📕	A	Martin th	
⇒+ System time		Moory 🎡	
⇒+ System date		R <u>e</u> move 🐡	
		Group by 🍐	
Window 1	Window 2		
		Random Selection	
		No of Records: 0	
		Test query	
×	Y	Rung query 🧏	
Add table Bemove table Where 💎 Select 🔿			
Select columns		Add +	
AND		Modify	
	Remove a		
Window 3			
	<u>~</u>		

**Available Fields - Window 1** - gives you all the available tables and sub-tables within the Fire Safety, Personnel and Training.

**Selected Columns – Window 2** – By using the Select button you can create the columns that you want the information to appear in on the Report.

**Selected Columns – Window 3** – this is were you define the query by using the 'Where', 'AND' and 'OR' options.

Before we go any further, let's see what the icons do in the toolbar



View SQL 🔗 The 'Structured Query Language' (SQL) executed when the Query is run
The Arrow icons allow you to move the fields
Add 📕 The Add icon at the top, allows you to add another Column – at the bottom, allows you to add a field
Modify The Modify icon at the top, allows you to make changes to the columns – at the bottom, allows you to modify the query
Remove I The Remove icon at the top, allows you to remove the fields – at the bottom, allows you to remove the line of the Query
Group by 🛔 The Group by icon allows you to add another column
Test query icon allows you to test if there is any data behind the Query and ensures that the Query has been formulated correctly prior to execution
Run query 🤞 The Run Query icon allows you to Run the query
Add table The Add Table button allows you to add another Field folder to Available Fields
Remove table The Remove Table button allows you to Remove the Field folder from Available Fields
Where The Where button allows you to select the fields you want to break down your query
Select -> The Select button moves the chosen field and move it from the left window to the right
AND The AND button tells your query that you want data back for X and Y and Z
DR The OR button tells your query that you want data back for X or Y
The Brackets buttons allows you to break down a query more

# When you are creating a query its good to write down what it is you want the system to search for and return to you

# Creating a Library

The 'Personnel Queries' system allows the user to section the information held within the system and 'Save' the query in a Library, access to which is completely user-definable.

Users with access to books within these Libraries may then construct and 'Save Queries' and transport the data from those queries into other applications (such as Microsoft Excel) where it may be formatted in any way that the host applications allow.

The 'Personnel Queries' makes full use of graphical user interface facilities and data is made available using common English terms rather than cryptic computer terminology. There is no need for users of the system to learn query languages.

New Library.

Open 👝

Within 'Personnel Queries'

• Click onto the 'Open' icon

As you can see there is already a list of 'Libraries'

#### Add a Library

Click onto the 'New Library' button

The 'Library Setup' box will appear

- Enter the 'Name' of your library
- Click onto the 'OK' button

Library setup			
Library name:	Di's Perso	nnel Library	
		Cancel	ОК

As you can see, 'Di's Personnel Library' in now been inserted into the Libraries list.

• Click onto the Library

As you can see here there are no queries saved in this Library

Libraries	Name	Description	Crei	Rename Query
Di's Personnel Library			*	Delete Query
				New Library
				Rename Library
				Delete Library
*	×11		2	
			OK.	Carcel

# Create a Query

What is the Question you want to ask the system???

First you need to work out what data you want the Query to return as the two examples shown below

I want to create a Query that shows -

#### Q1: Leavers for the Year from 1<sup>st</sup> April (enter the year)

For this Query to work we will need all of what is displayed below

Availability Tables:	Selected Columns:	Defined Selected Columns:
Personnel	Surname	Value of Ava or Una, Leave Blank Equals to Ava
Current Posting Details	First Name	AND
Service History	Service Number	Value of Finish Date Greater than or Equal to
	Ava or Una, Leave Blank	01/04/enter the year
	Reason for Leaving	AND
	Finish Date	Value of Reason For Leaving Is not Empty

Let's go through this Query Step by Step

First we need to enter our tables into the 'Available Fields' window

#### AVAILABILITY TABLES: window one

In the 'Fire Safety Queries' window you will see the option of 'General' in the left hand Available Fields window (1) with two sub options of

System Time – is the time the query was created System Date - is the date the query was created

These are defaults

To bring up more fields – this is so we can define the query

- Highlight the option of 'General' folder
- Click on 'Add Table' button at bottom of window 1







Add table

PAGE: 8

Under the 'General' folder you will be given the list of all the Tables available within 'Fire Safety Reporting'. All the other folders will only have sub-tables that are linked to that particular field.

Select table to add	
Multiple Pay Types Current Details Link	<b></b>
The Multiple Pay Types Service History Link	
🕅 Next of kin	
D Pay Types	
Pay rates	
Pay reference	
Pension schemes	
The Personnel	
Personnel - Segmented Addresses	
R Post categorie	
Te Post function	
Post pattern	
The Posts	-
Define Relationship	Select Cancel

Select a 'Table' that you wish 'Search' on by highlighting i.e. 'Personnel'

> Available fields General System time System date Personnel Surname

⇒ Service n
⇒ Initials

→ First names → National insurance numbe

Home address
 Home telephone
 Other telephone
 Date of birth
 Marital status

Add table Remove table

Click onto the 'Select' button



where 💎

As you can see 'Personnel' table and all the sub-fields within that table has appeared in the 'Available Fields' window (1) with a choice of sub menu options i.e. 'Service Number', 'Surname', 'Date of Birth' etc...

#### 'Add' more 'Tables'

Adding Additional Tables to the Query

Here is where you will link the tables together



Once a table has been selected you can not use the 'General' folder again. The reason for this is you now need to link the tables to each other for your query to work.

- Click onto the 'Personnel' folder
- Click on 'Add Table' button at bottom of window 1





selecco	able to add	
C A	bsence Monitoring	-
R A	ccidents	
C A	wards	
100 C	ontact details	
C C	ourse transactions	
Tim Co	urrent posting details	
000	ependants	
C Di	isabilities	
C B	mployer details	
C B	thnic origin	
RD M	edical Calendar	
CB M	edical transactions	
C N	est of kin	
4	norism and services	-
Defin	e Relationship Select Cancel	

Select 'Current Posting Details'

The 'Tables' that are 'Linked' to the 'Personnel' table will appear, as shown

Click onto the 'Select' button

<u>S</u>elect

'Current Posting Details' will attach itself to the bottom of the Personnel table list

Repeat the above instruction but this time...

- Click onto the 'Current Posting Details' folder
- Click onto Add Table
- Select Service History

Service History will attach itself to the bottom of the 'Current Posting Details' table list

 Available fields

 Image: Second Seco



- Click onto the Personnel folder
- Click onto Add Table
- Click onto Define Relationship button

Define Relationship...

Can C Open D	and Bill store at Bill	versu p
Available liekts	Select columns	Add 🚚
LA General	-	2
gr system and		
Descoved		Agence at
De Summe		Solomote All
B+ Service number		
B- Initials		Calculation IIS
B+ Fest names	Select table to add	
- National insurance number	Persion schemes	
B+ Home address	Processi - Segueried Addresse	
Hone telephone	Br Oud, Percentint	
- Other telephone	B Same between	
⇒ Date of birth	States and	
Be Marital status	all servers	
Add table   Remove table	Schent Warnend	
	all statute	
Select columns	40 100	
and I	(2) Lanny Instructors (ref.	
Brie	Traning instructors	
05	Tianing transactions	
	User-defined events	
6	Waling lot	
) [	1	,
	The Balance D	
	Fank something	2000 Lakes

# Define Relationship Button

'Define Relationship' does two functions... It allows you to link stand alone tables/data to other tables (attributes) within the system and/or use the 'Inner Join' / 'Out Join' options.

The 'Define Relationship' window will appear

On the left of the window there is a list of all the tables that are in the 'Personnel' window.

Scroll down to the table

• Select Ranks option

Let me explain the window in a little more detail, the first part...

#### From Column

The 'From Column' is a list of all the tables that are linked to the 'Personnel' folder in 'Available Fields' window (window1) you want to link a table to.

From Column > Select Personnel ID

#### To Column

The 'To Column' is a list that will change depending what folder you choose on the left of the Define Relationship box. This is where you link the table to the table in the 'From' option.

To Column > Select Ranks ID

Absence Monitoring Accident activities Accident body parts

As you can see in the two examples below, the 'To Column' is different depending on what is selected from the list on the left of the window.

Q pat 5 - actions and c

Accident body parts		_	To Colum	'n		
Accident causes			Absence	e Monitoring ID		8
Accident iniuries			Absence	Monitoring ID		
Accident locations			GROW ON	sign key to top sign key to toersi	on	
Accidents			Date of a	eview		
The Availability			00000000	sign key to theve		
Available Evidence						
Anad types						
Anads Anads						
Body parts						
Contact details						
On Cost Classes		<u>ت</u>				
Linking	the	'Personn	el	ID'	to	the
'Absence	Moni	toring ID'	in	the '	Prem	ises'
710501100	/ 1010111	tornig ib			10111	1505
antion						
option.						

:line Relationship	_		
Q. Level 3 (Recruitment)	•	From Column	
Q Level 38 (Recruitment)		PettornelID	
Level 3C (Recruitment)		To Column	
Level 4 (Recruitment)		@@Primary Key	
C Levell (Recruitment)		(PCPrimary Key	1
Level2 (Recruitment)		GAGPForeign Key Created By	
PArt 1 contact details (Health and Safety - Personal Injury)		Created Date	
Part 2 - Critical equipment failures (Health and Safety - Personal Injury)		Relationship ID	
Part 3 - When, how and what occurred [Health and Salety - Personal			
Q Part 3 - continued (Health and Safety - Personal Injury)			
SOPHTLOSIC Knowledge Base Anticles (Equal Opportunities)			
Q Witnesses Precent Dataset (Health and Safety - Personal Injury)			

Linking the 'Personnel ID' to the '@@Primary Key' in the 'Part 2 – Critical Equipment Failures (Health & Safety – Personal Injury)' attribute option.



From Column	
Personnel ID	-
Personnel ID	
Surname	
Service number	
Initials	
First names	
National insurance number	
Home address	
Home telephone	
Other telephone	
Date of birth	
Marital status	
Other telephone description	
Upper case conversion of surname	
Gender	
Blood group	
Major allergies	•

To Column	
Ranks ID	-
Ranks ID	_
Code	
Name	
Туре	
Seniority	
Qualification required	
Retirement proc segno, leave blank	
Hide rank from front of duty rota	
Pay scale group	

This is where you join the stand alone tables e.g. 'Audit Form' 'Health and Safety', 'Recruitment', 'Attributes' or 'Equal Opportunity' etc to a defined field.



'Personnel' tables are not stand alone tables they are linked within the system so this part of 'Define Relationship' may not apply to the query.

#### **INNER JOIN and OUTER JOIN**

The second part of 'Define Relationship'; 'Inner Join' and 'Outer Join', does apply to 'Fire Safety'. Look at the right hand side of this window there are 3 option buttons. These are called 'Join' buttons. Each option will have an 'Explanation' box with a brief description of what the 'Inner Join' options do

De

#### **INNER JOIN**

The 'INNER JOIN' only acts on rows were 'All 'Qualification', 'Attributes' Absence Monitoring etc....' records where there are related 'Personnel Records'.

#### OUTER JOIN

The 'LEFT OUTER JOIN (FROM)' only acts on rows were 'All 'Qualification', 'Attributes' Absence Monitoring etc....' records where there may or may not be related 'Personnel Records.'

The 'RIGHT OUTER JOIN (TO)' only acts on rows were 'All Personnel Records' where there may or may not be related to any 'Qualification', 'Attributes' Absence Monitoring etc....'

• Click onto Right Outer Join (to) option

Once you have finished setting up the 'Defined Relationship'

• Click onto the 'OK' button

fine Relationship	
Qual - course instance link     Qual - course link     Qual - course link     Qualifications     Qualifications     Ranke	From Column Personnel ID  To Column  Ranks ID
	C Inner Join C Left Outer Join (from) C Right Outer Join (from) Explanation All Personnel records where there are related Ranks
Service history	OK Cancel

Explanation	
All Personnel records where records.	there are related Ranks 🗾
	<ul> <li>Inner Join</li> <li>Left Outer Join (from)</li> <li>Right Outer Join (to)</li> </ul>

Explanation	
All Ranks records where the related Personnel records.	ere may or may not be 🗾
	<ul> <li>Inner Join</li> <li>Left Outer Join (from)</li> <li>Right Outer Join (to)</li> </ul>

I	Explanation	
	All Personnel records where the related Ranks records.	re may or may not be 🔺
		C Inner Join
		C Left Outer Join (from)
1		Right Outer Join (to)

As you can see the 'Defined Relationship' Ranks has appeared at the bottom of the list



The window will automatically defaults to the top of the Ranks list.

Scroll down the left hand column

Ranks will attach itself to the bottom of the Service History table list

One difference...

There is a plus (+) sign next to the Ranks folder. This means that this table is linked to the Available field.



Even though 'Ranks' table is linked to the 'Current Posting Details' table it may not be linked within the system setup. Knowing what tables are linked to and what sub-options are associated to what table go to 'Personnel Tables and Links Manual' to see the full listings of all 'Tables' and 'Attribute

Groups' that are in the 'Personnel Queries'.

It is also important to have a very good knowledge of the system setup and know where the data can be pulled from when creating these Reports from 'Personnel Queries'

# SELECTED COLUMNS: window two

🚫 Personnel queries - Untitled			_ 🗆 🗙
Clear 🛇 🛛 Open 📂	Save 🔛 🛛 Save as 🔛	Access 🕼 View SQL 🔗 🔽 🔺	
Available fields		Select columns	Add 🚚
🔍 General	<u> </u>	A	
⇒+ System time			Modify
⇒+ System date	_		Bemove and
🔍 Personnel			1.200.0 44
⇒+ Surname			Group by 🎄
⇒ Service number	Window 1	Window 2	Calandarian B
⇒+ Initials			
⇒ First names			
⇒ National insurance number			Random Selection
⇒ Home address			No of Records: 0
⇒ Home telephone			
⇒ Other telephone			Test query
⇒ Date of birth			Burn annan 🚸
B+ Marital status	<b>•</b>	×	nun query 🛪
Add table Bemove table	Where 당 Select 🖒		

To create the 'Report' you first have to select the information that you wish to return in report columns from the left window (1) into the right window (2).

• This is done by – for this example query

#### Within the 'Personnel' folder

• Double click onto the 'Surname' sub options

#### Or

- Click onto and highlight the 'File Number' sub options
- Click onto the 'Select' button

Select 🚽



The 'Select Value, Attributes' window will appear

Select value	e, attributes			
Select:	Value of	•		
	Surname			
Label:	Surname			
Justification:	left	-		
Width:		30		
				1
			OK	Cancel

Select drop down arrow gives you options to

'Value Of', 'Minimum', 'Average', 'Maximum Value Of', 'Sum Of', 'Count Of' etc...

The 'Label' box allows you to change the heading name for that column

- 'Justification' drop down arrow will allow you to align the data
- 'Width' allow you to change the character length which determines the width of column in report.

Select value, attributes				
Select:	Value of	•		
	Value of			
	Maximum value of			
Label:	Average value of			
	Minimum value of			
Justification:	Sum of			
o do ano ación.	Count of			
Width:	Distinct count of			
	Initials cantitalised value of	-		

• Click onto the 'OK' button

Clear Q	Open 🖻	Save 🔛	Save as 🔛	Access Cr. View SQL	8 7 4		
Available fields	6	(		Select columns			Add 🚚
🔍 General			-	Column1 = Value of Sumaria		-	
🚽 System tin	ne			Akas: Sumane	Align left		Modily 6
📑 System de	ale .		_	Not grouped by column	Width 30		Remove dP*
Personnel				L			
- Sumane				↑			Group by
- Service ra	unber						Columbra III.
🚽 Initials							Pacuation at
- Fest name							
🖶 National in	nsurance number						F Random Selection
- Home add	tess						No of Records: 0
- Home tele	phone						and the second second
- Other teles	phone						Test query 2
- Date of bi	rh						A
- Marital eta	dian.		*			2	Hug query ,X

As you can see the 'Surname' has appeared in the 'Select Column' window (2) on the right.

#### Within the Personnel folder

- Click onto First Name > Value of ٠
- Click onto the Select button

Select 🚽

-

\$

Modily 👸

ty 🛔

de la

Test query 🚺 Rup query 🔏

This will open up the 'Select Value Attributes' window

Select value	e, attributes		
Select:	Value of		
	First names		
Label:	First names		
Justification:	left 💌		
Width:	20		
		OK	Cancel

Click onto the 'OK' button



Save 😫 Save as 😫

Where 🔁 Select 🖒

As you can see the 'First Name' has appeared as column 2 under the 'File Number' column

By following the steps explained above...

#### Personnel folder

- Click onto 'Service Number' > Value of •
- Click onto the Select button

Select 🚽

This will open up the 'Select Value Attributes' window

Click onto the 'OK' button .

As you can see Service Number' has appeared as column 3 under the 'First Name' column

#### **Current Posting Details folder**

- Click onto 'Ava or Una, Leave blank' > Value of •
- Click onto the Select button

Select 🚽

This will open up the 'Select Value Attributes' window

Click onto the 'OK' button •



As you can see 'Ava or Una, Leave blank' has appeared as column 4 under the 'Service Number' column

Clear 🗘 Dpen 📂 Save	Save as 🔛	Access C= View SQL	9 7 4	
Available fields		Select columns.		Ads 🚚
- System time	-	Column1 = Value of Sumame	and the state of the second	
- System date		Alles: Sumane	Align: left	Modily &
Personnel	_	Not grouped by column	Walty 20	D
- Sumame		Column2 + Value of Fest names	and the second second	Henove #
- Service number		Aliac: First names	Align: left	Group by
B- tritials	2	Not grouped by column	Width 10	
- Fest names		Column3 = Value of Service numb	et .	Calculation E
National immance mether		Alac: Service number	Align: Sett	1.
The Money and have		Not grouped by column	Walk 11	E Denter Calud
- Hana talashana				1 Mandom Select
- Charlester		L .		No of Records: 0
		🦷		Test man 151
- Late of birth				sendowy [
Br Mantal status	-		•	1 Run query A
Ditter telenhone descention				

#### Service History folder

- Click onto Reason for Leaving > Value of
- Click onto the Select button

Select 🚽

This will open up the 'Select Value Attributes' window

Click onto the 'OK' button



As you can see 'Reason for Leaving' has appeared as column 5 under the 'Ava or Una, Leave blank' column

#### Service History folder

- Click onto Finish Date > Value of
- Click onto the Select button

Select 🚽



#### **Date Range**

The 'Date Range' fields are referencing the date attribute identified as a 'Reference Date'.

It would be usual to only set one date as a 'Reference Date' in a single query. If multiple 'Reference Dates' are used both dates will need to fall within the 'Date Range' defined.

E.g. where the 'Inspection Created Date' and 'Inspection Finish Date' falls within the 'Date Range' set.

If you enter a 'Date' criteria to your query the 'Select Value, Attributes' window will be a little different - as shown

This dialog box gives you the option to choose a different 'Reference Date'

The default is 'Within Date Range'

If you do wish to change this

Click onto the 'Reference Date' box

This will activate the options

• Select one of the options



To grey out the other options

- Remove the tick from the 'Reference Date' box
- Click onto the 'OK' button

This will open up the 'Select Value Attributes' window

Click onto the 'OK' button





At this stage, not all queries need to be defined or set to a date range.

#### Ranks folder

- Click onto 'Code > Value of
- Click onto the Select button

Select 🚽

This will open up the 'Select Value Attributes' window

Select value	, attributes		
Select	Value of	•	
	Code		
Label:	Ranks Code		
Justification:	left	•	
Width:		6	
			OK Cancel

In the Label box I have added 'Ranks' to the column heading

Click onto the 'OK' button

As you can see 'Code' has appeared as column 4 under the 'Finish Date' column

Valable fields	lister a	an worker		Select columna	174	Add 🚚
An Zone Sta An Pay Rate An Cost Cost	itus() (Returns statu s Status() (Returns s le Status() (Returns	s of zon e - SUB o tatus of payrate - status of cost cost	(TMP) SUB or TMP) Se - SUB or TM	Columni + Value of Ave or una, leave Alias: Ave or una, leave blank Not grouped by column	Align left Width 3	Modly &
/H Pay Type Banks (+)	e Status) (Returns s	tatus of payment	type - SUB or	ColumnS = Value of Reason for Intern Alist: Reason for leaving	Align left	Eroup by
- Code				Column5 = Value of Finish date	Width 16	Colculation 🖏
i∎⊷ Type ⊒⊷ Seniczły				Not grouped by column	Width 15	Randon Selection
B. Qualification Betrame	tion required nt proc segno, leave	e blank		Column7 = Value of Code Alias: Code Not on used by column	Algn left	No of Records: 0
Hide rank Pay scale	k from front of duty r e group	ola	-		_	Rup query

- 🗆 ×

#### Condition Equal to -

Function Value of

Value UNA

current posting of

Field

Where...

Field

Value

Function Value of

Condition Equal to

Equal to

Not equal to Greater than or equal to

Less than or equal to

This will open the value 'Where' window

The 'Function' box is always defaulted to 'Value of'

Click onto the Functions Arrow

A drop down menu of options will appear

A drop down list will appear > change if necessary

For this query we want the 'Function' on 'Value Of' option

-

•

٠

- Cancel

-

Cancel

ava or una, leave blank

ΟK

The Condition is always defaulted to 'Equals to'

- Click onto the Conditions Arrow ٠
- A drop down menu of options

current posting details.ava or una, leave blank



# In the 'Current Posting Details' folder

Where 당

- Click onto 'Ava or Una, Leave Blank' .
- Click onto the 'Where' button Condition - Equal to
- Value 'UNA'
- Click onto the 'OK' button

Value of 🔹 🔹
Value of
Upper case value of
Lower case value of
Mid value (substr(3.3)
Mid value (substr(3,2) 📃 🗾

= Numbers / Dates
= Numbers / Dates
= Numbers / Dates
= Numbers / Dates
= Text
= Text
= Text
= Leave Blank
= Leave Blank
= Text
= Text
= Text







# Define Selected Columns – Where:

# Add / OR Buttons

When using the OR / AND buttons you need to ask yourself what the question you're trying to ask is...

Use the And / Or buttons to breakdown your Query

AND = Surnames beginning with the letter S AND Location containing the letter N	AND
OR = Surnames beginning with the letter S OR Location containing the letter N	OB
() = You would use the brackets if you are giving more than one option – For example	<u> </u>

Year = 2007	(Year = 2007 AND Location = A)		
OR	OR		
(Type = A AND Location = B)	(X = Y AND A = B)		

The AND button gives does not give you an option it wants all data within 'Where' i.e.

Sickness where the Value of 'Finish Date' is 'Greater than or equal to' '01/04/09' AND Value of 'Finish Date' is 'Less than or equal to' '31/03/10'

The OR button gives you conditions and usually us the brackets to separate the options i.e.

Sickness where the (Value of 'Finish Date' is 'Greater than or equal to' '01/04/09' AND Value of 'Finish Date' is Less than or equal to' 31/04/09)

OR

Sickness where the (Value of 'Date' is 'Greater than or equal to' '01/08/09' AND Value of 'Date' is Less than or equal to' 31/08/09)

AND

Where 🕄

Add 🚚

#### Add in a Query Line

• Click onto either the AND / OR button

For this example I am using the 'AND' button

You can either: -

- Click onto the table through window (1) then
  - Click onto the 'Where' icon

Or you can...

•

- Click on the 'Add' button
- Select another option from 'Available Fields' window

Either way



#### In the 'Service History' folder

- Click onto 'Finish Date'
- Click onto the Where button
- Condition Greater Than or Equal To
- Value Enter a 1/4/enter the year
- Click onto the 'OK' button



As you can see the defined questions are now entered



Where 💎

Where 💎

#### In the 'Service History' folder

- Click onto 'Reason for Leaving'
- Click onto the Where button
- Condition Is Empty
- Value blank
- Click onto the 'OK' button



	Select columns	Ade	i 🚚 🗎	
-	Value of Ava or una, leave blank Equal to UNA			
AND	AND	Mo	dify <u>Ğ</u>	Once
<u>0</u> R	Value of Finish date Greater than or equal to 01 04 2009	Rem	ove 🗗	
	AND			query
	Value of Reason for leaving Is empty 0			
		▼		
<u> </u>				

Once all you have defined your

while...

To close the results window

Click onto the 'X' in the top right hand corner

# **Test and Run Query Buttons**

#### To 'Test Query'

Click onto the 'Test Query' button

A dialog box may pop up saying you have not used anything from tables that was selected in the 'Available Fields' window. You might not have used anything from that table in the column window (2) but did use one or so of the fields from the table in the 'Where' window (3) or it was part of the linking of tables. Either way...

Click onto the OK button

If there are no records to pull back which meet the search criteria entered, a message will appear as follows:

Ru<u>n</u> query 🥳

Test query

This lets you know not to run query as there are no records returned

- Click onto the OK button
- If there are records to return

A dialog box will appear letting you know that there were records returned

- Click onto the 'OK' button
- Click onto the 'Run Query' button

Same as above

Click onto the Yes button

The system will now search all the records for the answer for your query. Depending on the size of the query, this could take a little

As you can see in this example I had 377 records returned.

Thomson Morgan Leary Leary Thyne Thynn Thyne Thynn Thyne Thynn Thyne Thynn Thy

⚠	Query executed successfully however no records were returned.	
		OK





No fields have been selected from the Service history table

?	No fields have been selected from the Service history table, continue?	Do you wisł	n to
		No	Yes

Query executed sucessfully and records were returned

PAGE: 21

OK

### **Count Of**

Count of' will count how many records they are to be counted e.g. Ranks

• Double click onto the 'Code' column

or

- Click onto the 'Code' column
- Click onto the 'Modify' icon

The 'Select' box is a drop down box which defaults to the 'Value Of'

Click onto the 'Select' arrow

A dropdown menu will appear

Click onto 'Count Of'

This will allow the query to 'Count' how many; in this case, 'Code' were made for each 'Rank'.

• 'Count Of' has now appeared into the 'Select' box

L	have	also	changed	the
---	------	------	---------	-----

Deen Dreew Dreew Gray Gray Gray Haig Hand Hand Hand Hood Hoad Hoad Hoad Hoad Hoad Hoad Keen Keen Kee Kee Kee Kee

RI

- 'Justification' to 'Centre'
- 'Width' from '6' to '8'
- Click onto the 'OK' button

-
×
OKCancel

ielect value, attributes..

Value of

iount c

Distinct o

Value of Maximum value of Average value of

Minimum value of

Select

Label

Justificati

Width

As you can see the changes to the 'Inspection Type Code', in column 4, have been changed.

Alias: Ava or una, leave blank	Alian: left
Not grouped by column	Width: 3
Column5 = Value of Reason for leav	/ing
Alias: Reason for leaving	Align: left
Not grouped by column	Width: 16
Column6 = Value of Finish date	
Alias: Finish date	Align: left
Not grouped by column	Width: 15
Column7 = Count of Code	
Alias: Count of Code	Align: center
Not grouped by column	Width: 8

Select columns..

• Click onto the 'Run Query' button

As you can see 377 records have returned. The 'Rank Code ' has been counted for each 'each 'Leaver' for the Year.

'Code' heading has changed to 'Count of Code' and is now centred

Lolumn4 = Value of Ava or una, le	ave blank
Alias: Ava or una, leave blank	Align: left
Not grouped by column	Width: 3
Column5 = Value of Reason for le	aving
Alias: Reason for leaving	Align: left
Not grouped by column	Width: 16
Column6 = Value of Finish date	
Alias: Finish date	Align: left
Not grouped by column	Width: 15
Column7 = Value of Code	
Alias: Code	Align: center
Not grouped by column	Width: 8

Let's add another 'Count of'

• Double click onto the 'Finish Date' column

or

- Click onto the 'Finish Date' column
- Click onto the 'Modify' icon

The 'Select' box is a drop down box which defaults to the 'Value Of'

Click onto the 'Select' arrow

Α	dropdowr	menu	will	annear
~	ulopuowi	menu	vv I I I	appear

• Click onto 'Count Of'

This will allow the o	query to 'Count'	the; in this case,	'Finish Date
	1 2		

- 'Count Of' has now appeared into the 'Select' box
- Click onto the 'OK' button



As you can see the changes to the 'Finish Date', in column 6, have been changed.

-

Click onto the Run icon

Select value, attributes...

Value of Value of

Sum of Count of Distinct count Initials captitalis

Maximum value of Average value of Minimum value of

Select

Label: Justific

Width

In this example, there are now 190 records have returned counting how many 'Rank Code' and how many with 'Finish Date' for each 'Leaver for the Year.

The 'Finish Date' heading has changed to 'Count of Finish Date'.

٠

Let's make this query easier to understand by using the Grouping the query

Total nu	mber of records =	190				_	
Personn	el queries						_
Sumame	First names	Service r	Ava or una, I	Beason for leaving	Count of Finish date	Count of Rank Code	
Bell	Noel	4922	UNA.	0	2	2	
Doew	Danel Anthony	1450	UNA.	0	2	2	
Gray	Iain Robert	1692	UNA	0	5	5	
Haip	James	1402	UNA	0	2	2	
Hand	William Robert	1694	UNA	0	4	4	
Hill	Alan	1949	UNA	0	1	1	
Hood	Scott	6915	UNA	0	1	1	_
Hood	Johnny	5402	UNA.	0	3	3	
Hunt	Karen Patricia	9015	UNA	0	3	3	
Joss	Robin Ritchie	1400	UNA.	0	2	2	
Kean	Garry	1669	UNA	0	3	3	
Ken	Martin Hugh	1272	UNA	0	3	3	
Ken	Thomas David	1453	UNA.	0	2	2	
Mack	Dean	1616	UNA	0	2	2	
Marr	Trevor	1470	UNA	0	2	2	
Man	Roderick Fraser	1633	UNA	0	2	2	
Muir	James	9039	UNA	0	2	2	
Reid	Robert	1423	UNA	0	1	1	
Reid	lan Hill	3512	UNA.	0	2	2	
Reid	Martin Kenneth	1509	UNA.	0	2	2	
Robb	Alasdair	2093	UNA.	0	2	2	
Robb	David Stewart	6108	UNA.	0	2	2	
Ross	Angus	1426	UNA.	0	2	2	
Sear	James Tait	1095	UNA	0	2	2	
Shaw	Philip David	1281	UNA.	0	2	2	
Todd	Brian Matthew	1427	UNA	0	3	3	
Watt	Kenneth Neil	1299	UNA	0	1	1	
Weir	Kevin	1220	UNA	0	3	3	
Wymn	Ross	1234	UNA	0	2	2	
Acton	Matt	9041	UNA.	0	4	4	
Boyle	John Ingleby	1048	UNA	0	2	2	
Boyne	Grahame	8443	UNA	0	2	2	

Alias: Ava or una, leave blank	Alian: left					
Not grouped by column Wid						
Column5 = Value of Reason for lea	ving					
Alias: Reason for leaving	Align: left					
Not grouped by column	Width: 16					
Column6 = Value of Finish date						
Alias: Finish date	Align: left					
Not grouped by column	Width: 15					
Column7 = Count of Code						
Alias: Count of Rank Code	Align: center					
Not grouped by column	Width: 8					

Select:	Count of	
	Finish Date	
Label:	Count of Finish Date	
Justification	left 🔹	
Width:	11	
	E Reference date	
	🖲 Within Date Range	
	C Brought Forward	
	C Carried Forward	
	C After Date Range	
		OK Cancel

# **Group By**

Usually a Query will show the data in the columns you have selected. 'Group By' allow you to create a 'Three Dimensional' Query. To do a 'Three Dimensional Report', meaning you will have headings down the side (Y axis) and the headings along the top (X axis) use the 'Group By' button. Like a line chart.

- Click and highlight the 'Finish Date' Column
- Click onto the 'Group By' button



Select columns           Column4 = Value of Ava or una, leave blank           Alas: Ava or una, leave blank         Align: left           Not grouped by column         Width: 3           Column5 = Value of Reason for leaving         Align: left           Alias: Reason for leaving         Align: left           Not grouped by column         Width: 16           Not grouped by column         Width: 16           Column6 = Count of Finish date         Align: left           Not grouped by column         Width: 16           Not grouped by column         Width: 16				
ot grouped by column	Width: 3			
olumn5 = Value of Reason for lea	ving			
lias: Reason for leaving	Align: left			
lot grouped by column	Width: 16			
iolumn6 = Count of Finish date				
Alias: Count of Finish date Align: left				
lot grouped by column 🛛 📐	Width: 15			
Column7 = Count of Code				
lias: Count of Code	Align: left			
lot grouped by column	Width: 6			



For this example:

- Scroll down to 'Ranks'
- Click onto 'Code'
- Click onto the 'OK' button



Once you have selected all of your tables / columns it should look something like the example below



The selected field will now show in right window (2), (selected columns window)

Repeat this until you have entered in all headings for columns that you wish to be displayed in report.

• Run the Report

You will still see the 190 records that have returned like before, except the system has entered the 'Leavers' down the side of the page and the 'Rank Codes' across the top of the page, giving you a 'Count by' (total) of each 'Leaver'. And the row 'Grouped' the data by 'Rank' – giving each Rank its own column.

Statul member of records = 198	_ lol ×

# Saving Queries

To enable to be save the query that you have just created for retrieval and subsequent execution at a later date

Click the 'Save' button

The Save Query window will display

The system defaults to the first field 'Query Name'

- Enter an appropriate 'Name' of the query being saved
- Enter a 'Brief Description' of the query

Position the cursor in the 'Query Status' field

The system defaults to 'Private'

Private

Save 🔛



Save Query As

Query name:

Leavers for year from 1 April (enter year)

If however, the query is to be accessible to all users

• Select 'Public' option

The 'Public' option allows all users within the allocated department to see and use the query.

- Click onto the 'Library' folder
- Click the 'OK' button to 'Save' the query.

A query has been formulated and 'Saved' for retrieval at a later date.

L	Libraries						
Γ	Libraries		Name	Description	Crea	Rename Query	
	Di's Personnel Library	R.	Current Posting Details	Enter a brief description about about the c	03 02 🔺	Delete Query	
						New Library	
						Rename Library	
						Delete Library	
				1			

#### REMEMBER...

Users can change the query but must remember to always 'SAVE AS' this will give the user the option to give the amended query a new name. By clicking onto the 'SAVE' icon the user will overwrite the query...

The system will return to the 'Fire Safety Queries' window and the heading will have changed from 'Untitled' to the name you 'Saved' the query at.



#### View / Open a Saved Query

To 'View' or 'Open' the 'Saved' query

- Click onto the 'Open' button
- Click onto the 'Library' you saved the query in

As you can see the query you created and saved is in the 'Library'

Ľ	braries					
	Libraries		Name	Description	Crea	Rename Query
L	📑 📕 Di's Personnel Library 📥	圈	Current Posting Details	Enter a brief description about about the o	03 02 🔺	
		躍	Leavers for year from 1 April (enter year)	Enter a brief description about the Query a	04 02	Delete Query
						New Library
						Rename Library
						Delete Library
	¥	•		1	▼ ►	
					ОК	Cancel

Notice there is four columns

Name:	This is the 'Name' of the query
Description:	This is the 'Brief Description' about the query
Created:	This is the 'Date' the query was created
Last Run:	This is the 'Date' of the last time this query was opened and 'Last $\ensuremath{Run'}$

• Click onto the 'OK' button to close the window

# Save As - Duplicate Amended Queries

To enable queries to be 'Duplicated' / 'Amended' queries using the same kind of data but allowing you to amend, add, delete columns etc... And re-save under a new name.

Open 🍋

Save as 🔛

Open the original Query

- Click onto the 'Open' icon
- Click onto the 'Library' the query is saved in
- Select the 'Query'
- Click onto the 'OK' button



This will re-open the 'Saved' query

• Make the 'Amendments' to the query

As you can see I have removed the last entry and changed the date range



Click the 'Save As' button

The 'Save as' window will display

The system defaults to the first field 'Query Name'

- Enter an 'NEW' name of the query being saved
- Enter a 'Brief Description' of the NEW query

If you would like to change the 'Status' of the query...

- Select 'Private' or 'View' option
- Click onto the Library Folder
- Click the 'OK' button to Save the Query.

The system returns to the 'Fire Safety Queries' window

As you can see the query name has changed

🚷 Personnel queries - Leavers for year from 1 April (enter year)	
🛞 Personnel queries - Leaver 2008	

Save Query As
Query name:
Leaver 2008
Query description:
Enter a New Description of the Query and the data it will return
Query status: C Private © Public C View Library:
Di's Personnel Library
OK Cancel

# **Opening Existing Queries**

The query window has been modified to include the query description, the date the query was created and the date the query was last run. The query list now features sortable columns.

To enable the viewing and subsequent selection of Queries previously 'Saved'



The 'Libraries for Fire Safety Queries' window will display

• Click onto the 'Library Name' on the left hand side of the window

The Queries Saved to the highlighted Library will appear

- Highlight the relevant Query
- Double click on the query
- Or Click onto the 'OK' button

_						
ſ	Libraries	1557	Name Current Resting Details	Description	Crea	Rename Query
	Di's Personnel Library		Leaver 2008	enter a New Description of the Query and	04 02	Delete Query
		B	Leavers for year from 1 April (enter year)	Enter a brief description about the Query a	04 02	New Library
						Rename Library
						Delete Library



The query will appear in the FSQ window for you to execute, amend etc...



The Personnel Queries, Fire Safety Reporting, Training Queries and Operational Queries are exactly the same window just they reference different database tables enabling different type Queries to be created.

# Printing & Exporting Facilities from the Brown Clipboard

The following section describes how to use the standard 'Printing and Exporting' facilities which are incorporated in the majority of windows e.g. 'Fire Safety Queries Window'.

#### From the 'Executed' query

8	Total nu	mber of r	records = 22													×	
IF	Fire si	alety querie	5														
IE	FSEC Gro	Suppleme	Description	Count of Inspecti	BRG	CAS	CLAUDI	CL.FHF	CL HSC	CL.NEW	EDU	FUI	FUL	HOU	LIC		
IP		A	Hospitals	61	4	2	33	0	0	0	1	4	0	2	1 🔺		
E		B	Care Homes	42	2	3	28	0	0	0	1	0	1	1	1		In the top left hand corner
		C	Houses of Multiple Occupation (HMO) Tenement	33	1	1	24	0	0	0	1	0	0	1	1		
1		D	High Rise Flats Purpose Built >= 4 Storeys	17	1	1	8	0	0	0	1	0	0	1	1		
1		E	Hostels	14	1	1	4	0	0	0	1	0	0	2	1		
115		F	Hotels	14	1	11	2	0	0	0	1	0	0	0	1		
119		G	Houses Converted to Flats	9	0	0	5	0	0	0	0	0	0	0	1		
IP:		н	Other Sleeping Accomodation	10	1	0	3	0	0	0	1	0	0	1	1		
U.		J	Further Education	3	0	0	3	0	0	0	0	0	0	0	0		
IP.		ĸ	Public Buildings	4	0	0	4	0	0	0	0	0	0	0	0		
II!		L	Licensed Premises	24	0	11	12	1	11	0	11	0	0	2	2		
IP.		M	Schools	13	0	0	4	0	0	0	1	0	0	2	2		Click onto the 'Brown
112		N	Shops	26	12	2	8	0	0	0	12	0	0	3	2		• CICK ONTO THE DIOWN
112		2	Other Premises Open to the Public	21	11	12	14	0	0	0	11	0	0	3	2		
112		B	Factories and Warehouses	20	12	2	4	0	0	0	12	0	0	2	2		Clink a analy is a r
113		ş	Offices	23	11	10	12	0	0	0	11	0	0	3	2		Clippoard' icon
112		T	Other Workplaces	15	12	2	3	0	0	0	2	0	0	12	1		
13		16	Community Fire Safety Property	3	1 v	1 v	ź	Ň	1	ů.	N N	0	N.	1 v	N.		
18		AU101	Hotel	2	10	10	10	2	0	0	0	12	10	10	U.S.		
Ľ	2	A2	Factory	1 1	U.	l,	U.	U U	U.	U O	U.	12	l,	U.	U		
Ľ	3	A3	Office	1 1	0	0	0	0	0	0	0	12	0	0	0		
11/	4	10.4	Shop	6	0	10	2	0	0	11	0	3	0	10	0		

The standard printing and export facilities, represented by the 'Brown Clipboard' icon include the following facilities:

Modify Column Layout: Print Report: Send to MS Excel: MS Excel Formatting Options: Send To .csv File...: Letters and Mail: Factory Settings: Graph Results: eQ Apollo:

Close:

8 Total number of records = 22
🙀 Fire safety queries
Modify Column Layout
Print Report
Send To MS Excel
MS Excel Formatting Options
Send To .csv File
Letters And Mail
Factory Settings
Graph Results
eQ.Apollo
Close

# How to Modify Column Layout

Please refer to the 'Brown clipboard' button entitled 'Fire Safety Queries'

Click the 'Brown clipboard' button •

A drop down menu will display

Click onto 'Modify Column Layout' •



Americ	s column coninguration			_	JOILES
isible	Name	Desc	Sort		
~	FSEC Group	FSEC Group	1		
~	Supplementary Line No	Supplementary Line No	2		
~	Description	Description	3		
~	Count of Inspection type code	Count of Inspection type code	4		
~	BRG	BRG	5		
~	CAS	CAS	6		
~	CLAUDIT	CLAUDIT	7		
~	CL.FHFSC	CL.FHFSC	8		
~	CL.HSC	CL.HSC	9		
	CL.NEW	CL.NEW	10		
~	EDU	EDU	11		
2	FUI	FUI	12		
Π	lou.	Inu		Ľ.	

Depending on the columns checked will depend on the columns visible in the 'Fire Safety Queries' result window

i.e. only the above checked columns will display as so:

Remove the Ticks from the check boxes of the columns you 'Do Not' want displayed

Sort

Cancel

Sort List

OK

C 31							
	ESEC Group	ESEC Group	1 Sort				
Ē	Supplementary Line No	Supplementary Line No	0	-			
5	Description	Description	3				
V	Count of Inspection type code	Count of Inspection type code	4				
7	BRG	BRG	5				
2	CAS	CAS	6				
2	CL.AUDIT	CL.AUDIT	7				
7	CL.FHFSC	CL.FHFSC	8	-			
7	CL.HSC	CL.HSC	9				
	CL.NEW	CL.NEW	0				
2	EDU	EDU	11				
7	FUI	FUI	12				
Ē	leu.	leu.	110				

The 'Sort List' button will ascend 'Sort' column in ascending order

Click onto the OK button

s you can see the columns that had the ticks removed are now hidden

5et column configuration for Total number of records = [fR

ntary Line No

Count of Inspection type code

🔽 Save Column Widths 🔲 Restore Defaults

Desc Supple

MSC CL.NEW

OFS

SFA OTC

OFSA

BBG

CAS

FSEC Group

Description

ALIDIT

ntarv Line N

Count of Inspection type code

Amend column configuration Visible Name

MSC CL.NEW

SFA OTC

OFSA

BRG

CAS

FSEC Group

Description

OFS

ব ব ব ব ব

٠Ĩ

Restore Defaults check box by ticking this box it will put the ticks back into all the check boxes all columns will be visible.



## How to Print a Report

Please refer to the 'Brown clipboard' button entitled 'Fire Safety Queries'

• Click the 'Brown clipboard' button

A drop down menu will display

• Select the second option 'Print Report'

🚷 Total number of records = 22
🙀 Fire safety queries
Modify Column Layout
Print Report
Send To MS Excel

The system will automatically generate a report of the information currently displayed.

Screen	report.					_						ti Jin
Phar	OS - Sopi	ntlogic Ltd		Data printe	d 10 11 20	09 12:31						
Fir	e safety que	ries				Page 1						
FRECK	Joug Supplem	erta@430e/Men	Court of Impectio	1892ode	CAS	CLAUDIT	CL.FHFSC	CLHSC	CLNEW	EDU	PU.	
ABCDEFOH-	ABCDELGE-	Hespitals Care Hones Houses of Multiple Occupation (HMO) Terrer Hot Pose Flats Purpose Bult >= 4 Storeys Hotels Hotels Other Steeping Accumulation Earth of End	61 42 30 17 14 14 9 10	4211111010	2 3 1 1 1 0 0	33 28 24 8 4 7 6 3	000000000000000000000000000000000000000	0000000000	00000000	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	400000000	010000000
JKLMRPRST		Putine Enduation Public Buildings Licensed Premises Schools Shops Other Premises Open to the Public Pactories and Wavehouses Offices Other Workshares	4 7 12 76 75 78 75 78 75 75	0000	001022202	3412484455	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0100000	000000000	0111111	000000000	0000000000
2222	F6 A0101 A2 A3 A4	Community Fire Safety Property Hotel Factory Office Shop	32116	00000	00000	20002	0	10000	0 0 0 1	0000	01113	00000

Please note the information included in the 'Print' or 'Export' will be the data retrieved from the single or multiple searches previously performed.

• To print the report click the 'P' button positioned in the top right hand corner of the window.

A drop down menu will display.

Click onto 'Print Report'

The 'Print setup' window will display.

Please note the 'Print Setup' window defaults to the printer previously specified as the default printer via the 'Settings', 'Printers' option of the 'Start' button of Windows.

• Click the 'OK' button to print the report.

The system returns to the screen report.

When the report has been viewed and is no longer required.

• Double click the '8' button positioned in the top left hand side of the window or click onto the 'X' positioned at the top right hand side of the window.

The system returns to the 'Fire Safety Queries' window.





# How to Format MS Excel Options

Go to the 'Brown clipboard' button e.g. entitled 'Fire Safety Queries'

• Click the 'Brown clipboard' button

A drop down menu will display

• Select 'MS Excel formatting options'



The system will open the 'Excel formatting options' window

• Go to the 'Auto formats' list display

The 'AutoFormat' highlighted will display in the 'Sample' preview field

- Select the required 'Auto format' option.
- Click the 'OK' button if the Excel Formatting Options require saving.

Please note: the 'Excel Formatting' option that is selected will not be visible until the 'Send to MS Excel' facility has been used. As shown in the examples on the next page.











# How to Send to MS Excel

Go to the 'Brown clipboard' button e.g. entitled 'Fire Safety Queries'.

• Click the 'Brown clipboard' button

A drop down menu will display

• Select 'Send to MS Excel'



The system will automatically open 'Microsoft Excel' which will be visible on the task bar at the bottom of the window display.

• Click the 'Microsoft Excel' button



	ticro	soft Exe	el - Book 1																
18	Ek	Edit	Yew Insert Format Tools Data Window Hel	. /	١do	be	PDF												
10	2		🕘 🖂 🔍 🖤 📖 🗴 🛍 🛍 - 🛷 🔊 - (	× -	11	2,	Σ	•	2.	Z	1	11	1.4	0				1	A
	A	1	A +															_	
	Α	В	C	D	E	F	G	Η	I	JF	κL	. M	N	0	Ρ	Q	R	5 T	U
1																			
2	A	A	Hospitals	61	4	2	33	0	0	0	14	0	2	1	1	1	1	1 \$	1
3	В	В	Care Homes	42	2	3	28	0	0	0	10	1	1	1	0	1	2 1	1 0	1
4	¢	¢	Houses of Multiple Occupation (HMO) Tenement	33	1	1	24	0	0	0	10	0 0	1	1	0	1	1	1 (	1
5	D	D	High Rise Flats Purpose Built >= 4 Storeys	17	1	1	8	0	0	0	10	0 0	1	1	0	1	1 1	1 (	1
6	E	E	Hostels	14	1	1	- 4	0	0	0	1 0	0 0	2	1	0	2	0	1 (	1
7	F	F	Hotels	14	1	1	- 7	0	0	0	1 0	0 0	0	1	0	0	1	1 0	1
8	G	G	Houses Converted to Flats	9	0	0	-5	0	0	0 0	0 0	0 0	0	1	0	1	0	1 0	1
9	н	н	Other Sleeping Accomodation	10	1	0	3	0	0	0	10	0 0	1	1	0	0	2	1 0	0 (
10	J	J	Further Education	3	0	0	3	0	0	0 0	0 0	0 0	0	0	0	0	0 1	0 0	0 (
11	ĸ	ĸ	Public Buildings	4	0	0	- 4	0	0	0 0	0 0	0 0	0	0	0	0	0 0	0 0	0 (
12	L	L	Licensed Premises	24	0	1	12	1	1	0	1 0	0 0	2	2	0	1	1	1 1	0
13	M	M	Schools	13	0	0	- 4	0	0	0	1 0	0 0	2	2	0	1	2	1 0	0 0
14	N	N	Shops	26	1	2	8	0	0	0	10	0 0	3	2	0	4	1.3	2 1	1
15	Ρ	P	Other Premises Open to the Public	21	1	2	4	0	0	0	10	0 0	3	2	0	3	1 1	1 0	13
16	R	R	Factories and Warehouses	20	1	2	- 4	0	0	0	1 0	0 0	2	2	0	3	2	1 1	1
17	S	S	Offices	23	1	0	-5	0	0	0	1 0	0 0	3	2	0	2	3 ;	2 1	3
18	T	T	Other Workplaces	15	1	2	3	0	0	0	20	0 0	1	1	0	0	21	0 0	13
19	Ζ	F6	Community Fire Safety Property	3	0	0	2	0	1	0 (	0 0	0 0	0	0	0	0	0 (	0 0	0 (
20	Z	A0101	Hotel	2	0	0	0	0	0	0 0	0 1	0	0	0	0	0	0 0	0 1	0
21	A2	A2	Factory	1	0	0	0	0	0	0 0	0 1	0	0	0	0	0	0 0	0 0	0 0
22	A3	A3	Office	1	0	0	0	0	0	0	0 1	0	0	0	0	0	0	0 0	0
23	A4	A4	Shop	6	0	0	2	0	0	1 (	0 3	3 0	0	0	0	0	0 0	0 0	0 0

Microsoft Excel will open and the information in the 'Fire Safety Queries' results window will now be displayed in a 'Microsoft Excel' spreadsheet.

In this example the headings have not been included...

If this is the case, go to 'MS Excel Formatting Options' make sure there is a tick in the 'Include Column Headings' check box in the 'Optional Parameters' or click onto one of the 'Auto Formats' e.g. 'simple'.

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4	¢	¢	Houses of Multiple Occupation (HMO) Ter	- 3	3 1	1	24		) (		0	1	0	0	1 1	1 0	1	1	1	0	1	
5	D	D	High Rise Flats Purpose Built >= 4 Storey	1	7 1	1	8		) (		0	1	0	0	1 1	1 0	1 1	1	1	0	1	
6	E	E	Hostels	1	4 1	1	4		0 0		0	1	0	0	2 1	1 0	2	0	1	0	1	
7	F	F	Hotels	1	4 1	1	7		) (		0	1	0	0	0 1	1 0	0 0	1	1	0	1	
-8	Ġ	G	Houses Converted to Flats		9 0	0 0	5		) (		0	.0	0	0.	0 1	1 0	1 1	0	1	0	1	-
9	H	H	Other Sleeping Accomodation		0 1	0	3	0	) (		0	1	0	0	1 1	1 0	0 0	2	1	0	0	
10	J	J	Further Education		3 0	) ()	3	- 0	) (		0	0	0	0	0 0	0 0	0 1	0	0	0	0	
11	ĸ	K	Public Buildings		4 0	0 0	4	0	) (		0	0	0	0	0 0	) (	0 1	0	0	0	0	
12	L	L	Licensed Premises	2	4. 0	) 1	12	1	1		0	1	0	0	2 2	2 0	1 1	1	1	1	0	
13	M	M	Schools	1	3 0	0 0	4	0	) (		Ð	1	0	0	2 3	2 0	1	- 2	1	0	0	
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15	p	p	Other Premises Open to the Public	2	1 1	1 2	4		) (		0	1	0	0	3 2	2 0	1 3	1	1	0	3	
16	R	R	Factories and Warehouses	2	0 1	1 2	4		) (		0	1	0	0	2 2	2 0	2 3	2	1	1	1	
17	S	S	Offices	2	3 1	0	6	6	) (		0	1	0	0	3. 3	2 0	1 2	3	2	1	3	
18	T	T	Other Workplaces	5	5 1	1 2	3		) (		0	2	0	0	1 1	1 0	0 0	2	0	0	3	
19	z	F6	Community Fire Safety Property		3 (	) 0	2		) 1		0	0	0	0	0 0	) (	1 0	0	0	0	0	
20	z	A0101	Hotel		2 0	0 0	0	0	) (		0	0	1	0	0 0	) (	0 1	0	0	1	0	
21	A2	A2	Factory		1 0	0 0	0	0	) (		0	0	1	0	0 0	0 0	0 0	0	0	0	0	
22	A3	A3	Office		1 0	0 0	0	0	) (		0	0	1	0	0 0	0 0	0 1	0	0	0	0	
23	A4	A4	Shop		6 0	0 0	2	0	) (		1	0	3	0	0 0	0 0	0 0	0	0	0	0	

Below are a few 'MS Excel Formatting Options' examples.

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#### How to send data to CSV files

(Comma separated values – this is a text file that will open in Excel by default but can also be opened with a simple text editor, such as notepad. This is a standard file type for imports into other applications, such as Access.)

Go to the 'Brown Clipboard' icon e.g. entitled 'Fire Safety Queries'

• Click the 'Brown Clipboard' button

A drop down menu will display

• Select 'Send to .csv file'

Upon selecting '.csv', you will be prompted as to where you want to save the file to.

- Enter a location and name for the file
- Click onto the 'OK' button

You will see a working message and then Excel will open and the new file will be displayed.





PLEASE NOTE:

The default location when you start a new session is the application folder, but once you have changed this once and saved it will bring up the last save location.

If you do not enter the extension '.csv' after the file name, this will automatically be added.

You cannot enter a file name that already exists. If you wish to replace a file – delete it before you run this export.

## How to return to Factory Settings

When the modify column layout has been modified and there is a requirement to revert to the original layout, this can be achieved by selecting the 'Factory Settings' menu option on the brown clipboard icon. Example:

Modify Column layout

- De-select the columns that you do not wish to be displayed by un-checking the relevant checkboxes
- Select 'Factory Settings' from the 'Fire Safety Queries' results window brown clipboard.

Modify Column Layout	
Print Report Send To MS Excel MS Excel Formatting Options Send To .csv File	
Letters And Mail	
Factory Settings	
Graph Results	
eQ.Apollo	
Close	



All Columns will then be displayed on the Fire Safety Queries results window once the window has been closed and reopened.

When the report has been viewed and is no longer required.

• Double click the '8' button positioned in the top left hand side of the window or the 'x' positioned at the top right hand side of the window.

The system returns to the 'Fire Safety Queries' window.

These Features are currently not available.

The following message will be displayed

Letter and Mail, Graph Results and eQ Allolo

# **Query Manager**

# Setting up the Libraries

The Query Buster system allows an administrator to section the information held within the system into Electronic Libraries, access to which is completely user-definable. Access is granted to Administrative Units who are then deemed to own the data held within those Libraries.

Administrative Unit supervisors may then publish the data held within the libraries to other users of the system who require access to it.

Users with access to books within these Libraries may then construct and Save Queries and transport the data from those Queries into other applications (such as Microsoft Excel) where it may be formatted in any way that the host applications allow.

The Query Builder makes full use of graphical user interface facilities and data is made available using common English terms rather than cryptic computer terminology. There is no need for users of the system to learn query languages.

On the 'Global Navigator'

toolbar

Click onto the 'Query Manager' button •

8 DIANE.MCGOVERN@Sophtlogic Demonstration system (Build 2059) The 'Query Manager' button will appear in the File Edit Navigation SOPHT.net Fire Safety Query Manager Window

dia

de l

First of all let's look at 'Query Buster' to see what 'Libraries' (departments) you are able to see

- Click onto 'Query Manager'
- Click onto 'Query Buster'

As you can see you can see 'Sickness' and 'Training' libraries

- Close the 'Query Buster' window
- Click onto 'Query Manager'
- Click onto 'Libraries'



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Query Manager

#### The 'Libraries' window will appear



#### Add a Library

• Click onto the 'NEW' button

<u>N</u>	ew	
----------	----	--

The 'Library Setup' box will appear

Library setup			
Library name:	Di's Repo	orting Library	
		Cancel	ОК

- Enter the 'Name' of your library
- Click onto the 'OK' button

As you can see, 'Di's Reporting Library' in now been inserted into the Libraries list.



Click onto the Subscribers button

<u>S</u>ubscribers...

# Set-up a Users within the Libraries

# Linking the Department to the Query Library

Based on what Queries the Brigade wants their staff to see



As you can see there are no Offices/Departments selected to view the Queries in this Library.

- Click onto one of the Offices/Departments
- Click onto the Select Button

This will move the selected Libraries from the right window to the left window, giving the user within that library (department) access to the queries in your Library (department).

Subscribers to Di's Reporti	ing Library li	ibrary					
					Cancel	OK	
Available for selection:				Chosen	subscribers:		
FP	<u> </u>	Select	⇒	Fleet			^
Personnel			select				
Water		C					

Select 🚽



Click onto the OK button

Or hold down the 'Ctrl' key and click onto the libraries you want to 'Select'

ubscribers to Di's Rep	porting Library library	,		
			Cancel	ОК
Available for selection:			nosen subscribers:	
Available for selection: OPS Water		elect	nosen subscribers: leet P	

Remember: By 'Selecting' the libraries will able the users linked to that library (department) to see your queries in your library, but you will not be able to see their queries in their libraries (department) unless your library is selected to their library.

Check the Library has appeared in Query Buster

• Open Query Buster

From the Global Navigator load the Query Manager menu.

- Click onto Query Manager
- Click onto Query Buster

The Query Buster window will appear

Query Manager	Window				
QueryBuster					
List Publisher. Libraries Catalogue Cal Monitor Query Date C	 tegories onstraints				
User Defined I Automatic Qu	Reporting eries		) }		
System Help Menu Bar	•	Ctrl+F1			



As you can see the User/Post is authorised to use the 'Personnel and Di's Testing' Library

Let's authorise the user to access more 'Libraries'.

Close this Query Buster window

In your tool bar:

- Click onto Query Manager
- Click onto Libraries

The Libraries window will open

- Click onto one of the Libraries
- Click onto Subscribers button

Subscribers.





Has desks in the following administrative units:					
Fleet	Supervisor				
FP FP	Supervisor				
☑ OPS	Supervisor				
Personnel	Supervisor				
Sickness	Supervisor	_			
✓ Water	Supervisor	•			

By clicking on any of the Libraries your will see the same options – Fleet, Personnel, Water, Sickness FP and OPS - The reason for this is in the 'User Administration' these are the Offices you allocated to the Username.

As you can see in this window there are six Administrative Units (departments) have been selected to the 'Chosen Subscriber' window.



- Click and Highlight FP
- Click onto the Select button

The 'FP' library (department) has moved over to the 'Chosen Subscribers' list'

Click OK

Continue instruction above to access other libraries you are authorised to see

Let's go back to 'Query Buster'

- Click onto Query Manager
- Click onto Query Buster

As you can see

The Libraries has been added to the Library list

If the Library does not appear in the libraries list, this could be because your Library has not been selected within the e.g. Leavers Library even though you have selected Leavers into your Library.





- Go back to Libraries
- Click onto the Leavers Library
- Click onto the Subscribe button
- Select an Option (Leavers)
- Click onto OK
- Click onto Query Manager
- Click and Refresh onto Query Buster

You have now given the User/Post access to see another Library (department).

By following the steps above you can add as many 'Libraries' (department queries) that you are authorised to use in your 'User/Post'.

•



Click onto one of the Department icon

Any Queries that have been set up will be saved in that Library

#### Five steps to check that the Query Library has worked

- 1. Have a look of what Administration Units the user has got (Two Faces Icon)
- 2. Setup and/or assign the department to the User/Post (Privilege Profile)
- 3. Subscribe the Query Buster Library to the Departments (Library)
- 4. In Query Buster you should see the Libraries (Query Buster)

If you have selected too many Libraries follow the instructions above but this time:

Click onto the De-Select button

De-select

# List Publisher

List Publisher allows you to publish lists, select required columns and put them in certain Libraries

- Click onto Query Manager
- Click onto List Publisher



The List Publisher window will open



The List Publisher window you will see a list of folders.

These folders relate to accounts e.g. 'Fire Safety', 'Personnel' related views would be held in the SOPHT\_FP, or SOPHT\_PERSONNEL' folder.



Please note 'Account Name' in the 'Accessible Content' list will be preceded by the 'FRS' abbreviated name e.g. 'BEDS\_', 'MSB\_' etc...

- Click onto one of the Folders
- Click onto the Open icon



A list of published (in blue) and un-published (in black) - pre setup queries will appear

• Click onto a 'Query'



Click onto the 'Publish' icon



List Publisher	>
Core Impest Bublish Withdraw Bint	
cessible Content:	
SICKANAL2	
SICKANAL3	
SICKANAL4	
SICKANALYSIS (Published as Sickness Analysis in Personnel, Staff Ma	anagement)
SICKNESS	
SICKNESS_2059	
SICKNESS_BEFORE_JOINING	
SICKNESS_CERTIFICATES	
SICKNESS_DAY_TRENDS (Published as Sickness Day Trends in Sick	kness, Stall Managen
SICKNESS_GENERIC (Published as Sickness NEW 2059 in Personne	I, Sickness, Staff Mar
SICKNESS_INTERMEWS	
SICKNESS_MONTHLY	
SICKNESS_MONTHLY_2	
SICKNESS_MONTHLY_GHOUP	
SICKNESS_MONTHLT_GROUP_OPEN	
SICKNESS_PERSON_12_MONTHS	
SICKNESS_PHORESSION_STEP	A IN COLUMN COMPANY
CITYNESS_001 (Problemed as Sickness/Absence from Daty Hole Boo	A In alcaness, and h
SICKNESS OB3	
SICKNESS DUERY	
SICKNESS, ROTA, TRENDS (Published as Sickness Rota Trends in S	ickness, Stall Manac
SICKNESS BOTA TRENDS DETAIL (Published as Sickness Rota T	rends Detailed in Sick
SICK ANALYSIS	
SICK, ANALYSIS, PRA (Published as HRF Sickness in Sickness, Staff	Management)

#### The 'Publish List' window will appear

Publish List								
List being registered:	SICKNESS_GENER	IC					OK	1
Publish this list as:	Sickness NEW 2059	)					Cancel	
Description of list:	Sickness NEW 2059	•	<u> </u>					•
Publication library:	Occupational Health Pays Personnel Bacquiment	ì		<b></b>				
	_ necidianena							
Database column name		To be published as		1				
PP_SEQ				Visible	Pop-up	n/a	•	l –
PRA_SEQ				Visible	🔲 Pop-up	n/a	•	
STSEQ		]		🗌 🗖 Visible	Pop-up	n/a	-	
SURNAME_INITIALS		Surname		🛛 🗹 Visible	Pop-up	n/a	•	
SERVICE_NUMBER		Service Number	<u> </u>	Visible	🔲 Pop·up	n/a	•	Γ
GENDER		Gender		Visible	□ Pop·up	n/a	•	
NI_NUMBER		NINO		Visible	Pop-up	n/a	•	
ETHGRPCODE		]	~	🗌 🗖 Visible	Pop-up	n/a	•	
ETHGRPNAME				🗌 🗖 Visible	Pop-up	n/a	•	
ETHCODE		]		🔲 🗆 Visible	∏ Pop•up	n/a	•	
lr		Y		7	<b>—</b> ~	Γ.		· ·

- In 'Publish this list as' box enter a 'Name' of the query
- In 'Description of list' box enter a brief 'Description' of the query
- In the 'Publication library' box tick into the checkbox of the 'Libraries' you want this query to appear
- In the 'To be Published As' column Enter the Field Name (brief translation of the column name)
- Tick into the Visible box of the fields you want to be in the Query

If you do not tick the 'Visible' check box the fields will not appear in the Query – as shown -





A 'Processing' dialog box will appear counting the fields selected then it will disappear

If no text is entered into the description box you may get a dialog box appear saying there is no description specified



Click onto the OK button



As you can see the query selected has changed from black text to blue with the path name where the query has been published.

As you can see the 'Query' has been 'Published' into your 'Library'



# **Query Heading to Long**

If the heading; like in this case is to long

- Go to 'List Publisher'
- Click onto the folder the query is in
- Click onto the 'Query'
- Click onto the 'Publish' icon



In 'Publish this list as' box

- Enter a shorter name
- Click onto the 'OK' button

As you can see the name of the query is now shorter

MDI-III'I'S QUELABUSCEL		
ibraries: Di's Library	Person has skill but has not attended course duri	Queries (
	Γ	Publish 🍪
PERSON_NU_BA_TH PERSON_SKILL {Pub	AINING lished as PERSON_SKILL in Personnel}	
PERSON_SKILL_NOT	COURSE (Published as Person has skill but has	s not attended co
DEEDEN CONDEE I	) IKIZ	
Publish List		
Publish List	PERSON_SKILL_NOT_COURSE	
Publish List List being registered: Publish this list as:	PERSON_SKILL_NOT_COURSE	
Publish List List being registered: Publish this list as:	PERSON_SKILL_NOT_COURSE	
Publish List List being registered: Publish this list as:	PERSON_SKILL_NOT_COURSE Has skill no show during ref date	
Publish List List being registered: Publish this list as: MAMIN's QueryBuster	PERSON_SKILL_NOT_COURSE Has skill no show during ref date	
Publish List List being registered: Publish this list as: MAMIN's QueryBuster Litraie:	PERSON_SKILL_NOT_COURSE Has skill no show during ref date	A Queres

By repeating the above, you can insert as many queries; that are relevant to the Library, as you like.

#### Withdrawal Published Query form Library

To remove the query from your library

- Click onto the query
- Click onto the 'Withdrawal' icon







A dialog box will appear asking you if you want to remove the query from your library



Please note if any 'Saved Queries' have been associated to the list being 'Withdrawn' they will be deleted.

• Click onto the 'Yes' button

As you can see the 'Libraries' that the query was posted to has been removed



form the 'List Publisher' and from the 'Query Buster Library'.

# **Query Busters**

# **Running Queries**

From the Global Navigator load the Query Manager menu.

- Click onto Query Manager ٠
- Click onto Query Buster •

Query Manager Window		
QueryBuster		
List Publisher Libraries Catalogue Categories Monitor Query Date Constraints		
User Defined Reporting Automatic Queries		) }
System Help Menu Bar	Ctrl+F1	

N ADMIN's QueryBuster		
Libraries:		🔺 Queries 👩
Admin	-	Eubfish 🔒
Dis Library		New fat 8
Di's Testing		New.catalogue 🛅
Fleet		New hot list 💡
		Configuration 🔩
Personnel		Categories
Sickness		Delete catalogue
		Key.
	<u></u>	Catalogue
	I 1	Legacy data     V     Hot list

All of the Libraries that the current User/Post is authorised to view will appear in the left window.

Before we continue lets take a look at what all these icons on the right of the window do

Queries 🔣	To use the Queries, within the Libraries, that has been created.
<u>P</u> ublish 🕰	To Publish a Query to a Library
New list 🛠	The functionality is no longer appropriate
New catalogue 🛅	Folder Referencing
New hot list 💡	The functionality is no longer appropriate
Configuration 🗠	Allows you to amend the Catalogue
<u>C</u> ategories 🁸	Categories within the Catalogue
Delete catalogue 🔭	Allows you to Delete the Catalogue

There is a 'Key' box in the bottom right hand corner to let you know what the pictures next to the Queries mean.

Key:	
📴 List	
🖶 Catalogue	
🖶 Legacy data	
💡 Hot list	

# **Query Window**

• Select a Library and the Queries will appear.

Queries...

6

- Select a Query from the list
- Click on Queries button.



The Query for list Leaver will appear - as shown

🚷 Queries for list Leavers - (	untitled)			
Select: Value of		Status: Private	- /. 🏼 🖻 🗛 🔛 🖓	୍କ
Surname	40 🔺			-
Initials	6			
Service Number	11			
Location	6			
Rank Code	6			
Rank Name	30			
Date Joined service	9			
Date Left	9		Window 2	
Reasons for leaving	64			
Leaving notes	100			
Home Address	100			
Watch	64			
Duty Bud Code	64			
Post Lode Gender	1			-
Rank tupe	11		1	
In arik (ype				
Query columns:		Query functions:		
Surname	•	Equal to	• 🖻 & Dr ( )	
				<b>^</b>
	N N	/indow 3		
				~
	6		📩 Run query	<b>B</b> 2
فللك للمستخلص	<u> </u>			
				/

The 'Query for list' contains 3 windows

Window 1 – List of the available Fields within the Query.

Multiple values can be selected from this list.

Window 2 – Where the selected fields will be displayed

Window 3 - Is where you can define the search

By changing this dropdown, the status of the saved query will not automatically be saved.

By default this will select the Value Of the Fields, but there are other options: some examples to follow

Quer	ies for list Vehicle Jobs - (untitled)	/			1	<u> </u>
elect:	Value of	<u>,</u>	Status:	Private 1	. 🔝 📂 🗛 🔛	<b>1</b>
	Value of Total number of Sum of Minimum value of Maximum value of Maximum value of			Private Public		<b>A</b>
	Average value of Addition of Distinct count of {Calculated}					
	{Create Column For} {Subtotal} {Total}					

Value Of	Displays all details – most commonly used
Total Number Of	Gives a count of the number of records
Sum Of	Must be used against a number field – i.e. Sum of Total Hours
Minimum Value Of	Minimum Value of a number
Maximum Value Of	Maximum Value of a number
Average Value Of	Must be used against a number field – i.e. gives you an average of hours worked
Addition Of	Must be used against a number field
Distinct Count Of	Count of the number of different values in selected field

8

s

When one of these functions is used, other than 'Value Of', then the rest of the 'Value Of fields' will be grouped together – each combination of values will only appear once.

The Public and Private dropdown shows the current status of the open Query.

Private = only the user who created the Query will be able to see the Query
Public = anyone can access the Query

Status:	Private	•
	Private	*
	Public	$\overline{\mathbf{v}}$

The buttons at the top of this window have the following functions:

Clears the existing Query and Report Criteria

Set up Saved Query as an Automatic Query

Opens a Saved Query

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Prompts for revision on an existing set of Data

Saves the current Query (Shift + Click can be used to Save As - so as not to overwrite an open saved Query)

Enter a Reference Date Range

Multiple values can be selected from this list by dragging the mouse across the fields or use the Ctrl key and click onto the selected fields.

• Click to highlight multiple lines.

Queries for list Leavers - (untitl	ed)			
Select. Value of		Status: Private	. <u>/. 🖾 🖻 🗛 🖬 D</u>	<u> </u>
Sumane	40 -			-
Initials	6			
Service Number	11			
Location	6			
Rank Code	6			
Bank Name	30			
Date Joined service	9			
Date Left	9			
Reasons for leaving	64			
Leaving notes	100			
Home Address	100			
Watch	64			
Duty	64			
Post Code	11			
Gender	1			*
Rank type	11 🛒	▲ ▼ 書 � ◊		
Query columns:		Query functions:		
Sumame	*	E qual to	• 🖻 6 D ( )	
				-
			A Runs	<u>~</u>
				why W



Once, at least one line has been selected from the above list.

Click onto the blue arrow button



As you can see the two fields I have highlighted have moved to the right and will be returned in the column table. As shown (window two)



The buttons in this section do the following:

	Move Up and Move Down – select a line from the included fields then use these buttons to change the field order.
<b>6</b> *	Remove Line
<b></b>	Amend Line
$\diamond$	Clear List

# Verifying a Query is Correctly Formed

First before you 'Run the Query' you can check to see if the Query is correctly formed

Click onto the Thumbs Up button.	
If the query is correctly formed the following message will appear:	Query tested OK to run
If the query has errors an error message will appear.	This query is not correctly formed. The internal error code is -936

## Reasons That A Query May Not Run Correctly.

1. Normally errors are caused when the where clause is not correctly formed – i.e. there are open brackets without close brackets. Check that the where clause always reads:

expression and/or expression and/or expression

- 2. Functions may have been set incorrectly. For example a sum can only be performed on a number field. If a user tries to sum any field other than a number then it will cause an error.
- 3. There are errors in the underlying query. [Save first if required] To test this, take out any fields that have been selected and remove the where criteria. Then press the Thumbs Up button. If there is still an error then this should be reported to SOPHTLOGIC.

If the query is correctly formed then press the 'Run Query' button to execute the query.

• Click onto the Run Query button



The outcome of the Query will appear - as shown



Let's take a look at the top of this window and what the buttons etc do...

The buttons on this window do the following:

	Close results window
<b>**</b>	Export to Excel. It is much better to use the export option from he brown clipboard to do this
4	Prints the results
	Print labels from the results in the list
<b>P</b>	Can be used to specify a title for the report
	Save results to database
	Create html document (must save query first)
	Open as html document (must save query first)
æ,	Print as html document (must save query first)
	Export to .csv (comma separated values) text file



• Select 'Display Record Count' to view the number of records returned.

Display record count

This will show at the bottom of the window

Total number of records:225	

• Select the 'Specify Report Title' check box to be able to enter a name for the report.

Specify report title Enter the Title of The Report Here

This will be used when printing the report.

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Entric Table of Table Report Hand	87 62 2000 K2:n6
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Definition         6         AU(2)         AU(2)         Para person           Devint         1         400         COVPL         Para person           Devint         1         400         COVPL         Para person           Devint         1         400         COVPL         Para person           Devint         1         100         Para person         Para person           Devint         1         COVPL         Para person         Para person           Devint         1         COVPL         Para person         Para person           Devint         1         COVPL         Para person         Para person           Devint         1         Para person         Para person <th>e men free</th>	e men free
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Click onto the Print icon

•



As you can see the where the Heading would go in the Report

# To Define the Query Further...

The bottom half of this window allows for the results to be restricted.

The buttons in this section do the following:

&	Adds an 'And' clause into the search criteria
<u>O</u> r	Adds an 'Or' clause into the search criteria
	Adds brackets to the search criteria
	Move Up and Move Down - select a line from the included fields then use these buttons to change the
	field order
	Increase and Decrease Indent
<b>E</b> +	Remove Line
<b></b>	Amend Line
$\diamond$	Clear List

The Query Columns drop down list will show all of the available fields.



- The Query Functions dropdown gives the following options to restrict data.
  - Choose a field to restrict the data by.

#### As you can see I have chosen 'Surname' and 'Begins With'

Query columns:	Query functions:	
Surname	Begins with	

• Click onto the blue arrow button



The 'Specify Query Line' window will appear:

The Query Column – 'Surname' – and 'Query Function – 'Equals To' have already been entered.

Specify que	ery line		
Query colur	nns: Surname	•	💙 ок
Query funct	tions: Begins with	•	Cancel
Field value:	а 🔨	<u>-</u>	
		Execute as calculat	ion

To change either of these boxes

• Click onto the Arrow and choose from the dropdown list

In the 'Field Value' box

• Enter your Field Value

The Field Value is basically were you asking the system a question – I want to know all 'Surnames' 'Begins With' the letter 'S' or 'Smith'

• Click onto the OK button.

As you can see the 'Surname Begins With 'S' has appeared in the Query window

Query columns:	Query functions: Begins with
Surname begins with S	<u>A</u>
	La query 😨

First before you 'Run the Query' you can check to see if the Query is correctly formed

• Click onto the Thumbs Up button.

Query tested OK to run

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If the query is correctly formed the following message will appear:





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and a	14	Lanisi.	2444	Industry strategy	Later.	LAPPE .	1.00
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The Results for the Query will appear - as shown



Notice that the headings are the same to the last Query we did. The reason for this is the query is still using the criteria that we selected from the fields and moved them over to the results table.



Now let's breakdown the Query further

As you can see I have chosen 'Location' and 'Contains'

Query columns: Query functions: Location -Contains

• Click onto the blue arrow button



The Specify Query Line window will appear:

The Query Column - 'Location Code' - and 'Query Function -'Contains' have already been entered.



To change either of these boxes

Click onto the Arrow and choose from the dropdown list

In the 'Field Value' box

Enter your Field Value

The Field Value is basically were you asking the system a question - I want to know all 'Locations' 'Containing' the letter 'N'

Query columns:	Query functions:
Location Code	Contains 💽 🛃 & 💁 ( )
Sumame begins with S	*
Location Code contains N	
	<u>×</u>
	🛍 Run query 🜚

# And / OR

Use the And / Or buttons to breakdown your Query

**AND** = Surnames beginning with the letter 'S' AND 'Location' containing the letter 'N' **OR** = Surnames beginning with the letter 'S' 'OR' 'Location' containing the letter 'N' () = You would use the brackets if you are giving more than one option – For example

Year = 2007		(Year = 2007 AND Location = A)
OR		OR
(Type = A <b>AND</b> Location = B)		(X = Y AND A = B)
Click onto the 'AND' (&) icon	&	

#### This has now been entered into the query

Query columns: Query functions: Location Code  Contains	As you can see the 'AND' has appeared at the bottom of the list, you need it to be in between the two expressions. To do this
Click onto the Arrow icon	
Query columns:     Query functions:       Location Code     Contains       Surname begins with S     and       Location Code contains N     Image: Contains N	As you can see the 'AND' has moved up between the expressions.
To make sure the query is set up correctly	
Click onto the Thumbs up icon	

Run query 🧐

• Click onto the Run Query icon



As you can see the Query has been broken down and 13 results – for all Surnames beginning with 'S' AND are in the Location containing 'N'  $\,$ 

Let's take out the 'AND' and replace it with 'OR'

To remove the 'AND'

- Click onto the 'AND' (highlighted)
- Click onto the 'Remove Line' icon

Ħ

The 'AND' should now be removed

• Now Click onto the 'OR' icon

1

query columns:	query runctions.		
Location	Contains 🔹	🔁 🕹 🖸 ( )	
Surname begins with S			<b></b>
or			
Location contains N			
			-
		¢.	Run query 🕸

 Query columns:
 Query functions:

 Location Code
 Contains

 Sumane begins with S
 Image: Contains N

 Location Code contains N
 Image: Contains N

 Image: Contains N
 Image: Contains N

Use the arrows to put the 'OR' in between the expressions – as shown

To make sure the Query is set up correctly

Click onto the Thumbs up icon



• Click onto the Run Query icon

Comparements for hit Lawrens (which of )
 Comparements for

As you can see there are a lot more records within this query

Once you have created your Query and you want to Save it...

As you can see the Query has been broken down and 393 results – for all Surnames beginning with 'S' OR the Location containing 'N'

# Saving and Opening a Saved Query

By Saving a Query, the Field information and search criteria will be saved, and can then be restored using Open.

Within the Queries window

• Click onto the Save As icon



🛞 Queries for list Leavers	- (untitled)	_ 🗆 🗵
Select: Value of	💌 产 Status: Private	· /, 🖩 🖻 🗛 🎽 🛛 🖓 🔍
Surname	40 🔺 Value of Surname	
Initials	6 Value of Initials	
Service Number	11 Value of Service Number	

The Open and Save window are basically the same:

When saving...

• Enter a meaningful Description for the Query.

The open dialog box will not allow the user to type in this field.

All existing Queries would be shown in the list, and by selecting one, the Description would be populated with the name of the selected Saved Query.

Di's Saved Query on Leavers - Sumame Beginning with S - Location Contains N				OK
Query name	Query status	Status		Cancel
March 2004	Public .	Ad-hoc		Delete
May 2004	Public .	Ad-hoc		Duplicate
R Contraction of the second se				<u>R</u> ename
N N			l l	<u>S</u> tatus
				Alerts
			ſ	<u>M</u> onitors.
			[	<u>T</u> ags
			=1	
			•	

#### Queries can be saved as Public or Private.

• Everybody with access to the current Library will have access to Public Queries.

Private

Public Private

- If a Query is saved as Private, then only the current user can see this.
- Click onto the arrow
- Specify the status before saving the Query.

The Query will be saved within this window

To View this Query

- Click onto the Library
- Open the Query you had open earlier
- Click onto the Queries icon
- Click onto the Open icon







As you can see your Saved Query is within this window

Dis Saved Query on Leavers - Sumame Beginning with S - Location Co	ontains N			OK
Query name	Query status	Status	ΤÌ	Cancel
Dis Saved Query on Leavers - Sumame Beginning with S - Location C	Public	Ad-hoc	<u> </u>	Delete
Aarch 2004	Public	Ad-hoc		<u>D</u> 0/010
Aay 2004	Public	Ad-hoc		Duplicate
				<u>R</u> ename
				<u>S</u> tatus
				Alerts
				Monitors
				<u>I</u> ags
			<b>T</b>	
			_	

To change the status of a Query at a later date,

Bring up the Open dialog,

#### Delete, Duplicate, Rename a Saved Query

- > 🍋 Go to the Open or Save dialog Query name: Di's Saved Query on Leavers - Surname Beginning with S - Location Contains N OK Highlight the Saved Query ٠ Query name Di's Saved Que Query status Statu Cancel E Publi ∆d-hc Delete March 2004 May 2004 Public Public Ad-hoc Ad-hoc Duplicate Click onto the Delete button . Delete Duplicate Duplicate button will prompt for a name for the new Saved Query . Rename button allows a Saved Query to be renamed without the need to Open and Save As. <u>R</u>ename The Status button allows you to change the Query from Private to Public. The status of this query will be changed from Private to Public. Do you wish to 2) <u>S</u>tatus.. continue? No Yes Click onto the Yes button You may get a dialog box up saying that you did not create the You can only change the status of queries created by you. Please re-select. Query so you can not change its Status 1
  - Click on to the OK button

ΟK

# Automatic Queries

# **Setting-Up Automatic Queries**

Scheduling queries allows a user to set up queries to be run at regular intervals. When a person logs in to pharOS they will be prompted with any outstanding 'Automatic Queries'. Once an 'Automatic Query' has been run the results are then stored in the database and can be compared to other results of the same query run previously.

In order to do this there must be a 'Saved Query'.

- Open the saved query to be added to the 'Automatic Queries'.
- Click on the 'Grid' button





This will open the 'Schedule for Automatic Query Applications' window

Schedule for auto	matic query BRG Job T	ype for FSEC Group F ? 🗙
Base date / time -		Ownership
Date:	01 01 2010 00:00:00	Automatic query owned by user
Time:	09:00	ADMIN
Frequency:	8 © Days C Months	Administrative unit:
Next Date:		Fire Reports
Last defered date	/ time	HFRA HR Support
Date:		Information Technology Macc
Time:		Operational Planning
		OK Cancel

- Enter in a 'Base Date' i.e. date from which query is to start from
- Enter in desired 'Time' for the query to be run e.g. 09:00
- Enter in 'Frequency' of query whether it is in days or months
- Click 'OK' to 'Save Automatic Scheduling of Query'

For example: If you wish the query to run starting from the beginning of the year, with a frequency of every 8 days at 09.00, the 'Base Date' would be set at 08 12 2009, the frequency 8 with corresponding 'Days' radio button selected to 'Days' and time specified as 09.00

For the query to take affect

- Log out
- Login
- Choose the 'Office/Department' the Query was saved under

The 'Automatic Queries Scheduled for Today' window will appear

utomatic queries scheduled for today											
Private automatic queries:											
Status	Query name	Base date	Base time	Last modified by	Def	Can	Exe	Deferred date/time			
Running	Surname -S Location - N	03 06 2008	13:20	ADMIN				×			
Automatic	queries owned by Admin:				1						
Status	Querv name	Base date	Base time	Last modified by	Def	Can	Exe	Deferred date/time			
								×			
•								•			
Abo	ort							Next>>			

As you can see the 'Scheduled Query' is in the reminder window

#### Deferred

This option will Defer the Query to	Automatic queries scheduled for today										
different date	Private au	tomatic queries:								_	
	Status	Query name	Base date	Base time	Last modified by	Def	Can	Exe	Deferred date/time		
	Defered	Surname - S Location - N	03 06 2008	13:20	ADMIN	•			05 06 2008 10:00:0C	*	

#### Cancelled

utomatic q	ueries scheduled for to	oday						
Private au	tomatic queries:							
Status	Query name	Base date	Base time	Last modified by	Def	Can	Exe	Deferred date/time
Cancelled	Surname - S Location - N	03 06 2008	13:20	ADMIN		V		

#### Running

This option will Run the Query

This option will Cancel the Query

A	Automatic queries scheduled for today											
	Private aul	tomatic queries:										
	Status	Query name	Base date	Base time	Last modified by	Def	Can	Exe	Deferred date/time			
	Running	Surname - S Location - N	03 06 2008	13:20	ADMIN			V		<b>A</b>		

To run the Query

• Click onto the Next button

Next>>

а

Executing query...

A dialog box will appear saying Executing Query

Very quickly the Query will flash onto the screen then disappear





To Retrieving Results of Automatic Queries go to page

If you don't want the Query to Run

Click onto the 'Abort' button

Abort

The 'Automatic Queries Scheduled for Today' window will close

utomatic queries scheduled for today													
Private au	Private ducingit: Queries.												
Bunning	Query name Sumame - S Location - N	Date date	Base time 13:20	Last modified by	Der	Can	Exe	Deferred date/time	1.0				
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Automatic	quaries owned by Admin:												
Status	Query name	Base date	Base time	Last modified by	Def	Can	Exe	Deferred date/time					
									×				
•									•				
Abs	Abort Next >>												

Notice the heading has changed on your saved (automatic) query from <untitled> to <automatic> This allows the user to know if the query has been setup as a to be automatically run

10 Queries for list IRMP 09 - Eng	land - FS2 - BRG Job Type for FSEC (	Group F (untitled)		
Select: Value of	💌 🖻 Status: Private	· 🖊 🔳 🖻 🗛 (		
Job Type Return Co	22 10 Queries for list IRMP 09 -	England - FS2 - BRG Job Type	for FSEC Group F <automatic></automatic>	
FSEC Group Inspection Complete Date	9 Select: Value of	💽 🖻 Status: 🛛	Private 💽 🥂 🛄 💽 🛤	📔 🛛 🖓 🔍
	Job Type Return Co	22 🔺 Value of Job Ty	vpe Return Co	<u></u>
	FSEC Group	11 Value of FSEC	Group	
	unspection Lomplete Uate	H Value of Inspect	tion Lompiere Llate	

# **Retrieving Automatic Queries**

To check the Queries that was Automatically Scheduled for Today

- Click onto 'Query Manager'
- Scroll down to 'Automatic Queries'
- Check 'Today's Schedule'



If no queries are due to be run for that day, no window will display.

#### If queries do exist:

Private a	tomatic queries:							
T IIVate a	atomatic queries.	D 11	D (		0.0		<b>F</b>	<b>B</b> ( 111 B)
Status	Uuery name	Base date	Base time	CODULT STATE	Der	Lan	Exe	Deferred date/time
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Turning	Automatic queries	31 10 2000	00.14	CODUT_STATS	나는			
hunning	Current Personnel Posts -	31 10 2006	10.15	SOPHI_STATS	나는			
								T
•								Þ
Automatic	c queries owned by FPC				1			
Status	Query name	Base date	Base time	Last modified by	Def	Can	Exe	Deferred date/time
								×
- P	•							

As you can see the query we have just created is now in the 'Scheduled for Today' list

Click 'Next' to run any query listed

Other wise close this window and go to 'Retrieving Results of Automatic Queries'

# Retrieving Results of Automatic Queries

To see the results of the query that has just Ran

- Click onto 'Query Manager'
- Scroll down to 'Automatic Queries'
- Click onto 'Open Browser'





This window can also be accessed from within the published query view by clicking on the Binoculars icon.



- Select query by clicking on the '+' and any results of query run will be listed.
- Select results to be printed to screen and click on the floppy disk icon with a red arrow.





Results will now print to screen and can be printed to printer, saved or exported to excel.

# **Reference Date Functionality**

A number of queries use this functionality to allow a 'Date Range' to be entered – then only records between the set dates will be returned.

		🚷 Queries for list Leavers - Surna			
Within the guery window		Select Value of	•	Status: Private	· <u>/.</u> • • • • • • • • •
within the query window		Sumame Initials	40 ~ 6	Value of Sumame Value of Initials	2
		Service Number	11	Value of Service Number	
		Location Bush Code	6	Value of Location	
		Bank Name	30	Value of Hank Lode Value of Rank Name	
		Date Joined service	9	Value of Date Joined service	
		Date Left	9	Value of Date Left	
Click onto the '1' icon		Reasons for leaving	100	Value of Reasons for leaving	
		Home Address	100	Value of Home Address	
		Watch	64	Value of Watch	
		Duty Duty Code	64	Value of Duty	
		Gender	1		<u>=</u>
		Rank type	11 🚽	▲ ▼ ₽*� ◊	
		Query columns:		Query functions:	
		Sumame	*	Equal to	
		Sumame begins with S			~
		and			
		Location begins with N			
The 'Reference Date' window will appear:					-1
					Bun query (9)
Enter Date Range					
	Entra				
Date From: 01 01 2008 00:00 Date To: 04 06 2008 00:00	• Enter 1	the Date Range	È,		

Queries that use the 'Reference Date' functionality generally have some note of it in the name of the

Query > ie 'Current Postings Ref Date'.

The 'Reference Date' is set on a per user basis and is stored in the central database – so it will be stored for a user regardless of which machine they use to log in from.