SOPHTLOGIC

Personnel Query Reporting 2010a

User Manual

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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.

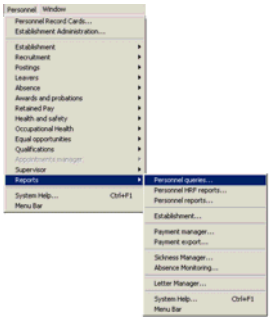
User Defined Reporting

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)

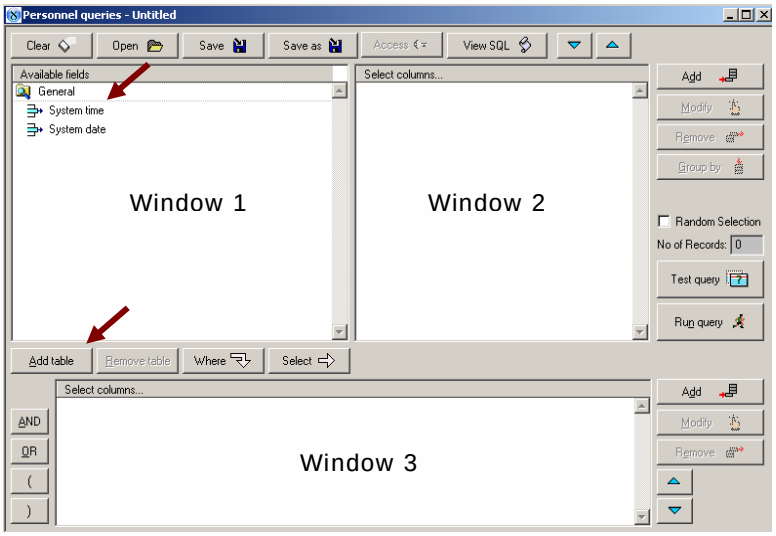
This option allows the user to build user defined reports. This is a very powerful tool, but requires an understanding of how the database is made up.

- 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

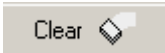


Available Fields - Window 1 - gives you all the available tables and sub-tables within the Fire Safety, Personnel and Training.

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



The Clear icon will remove all text that has been entered into all of the windows

The Open Icon will open the Libraries where your queries will be saved

The Save icon will save your query

The Save As icon will allow you to Save your query under a new name

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 — 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 — The 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

OR — 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

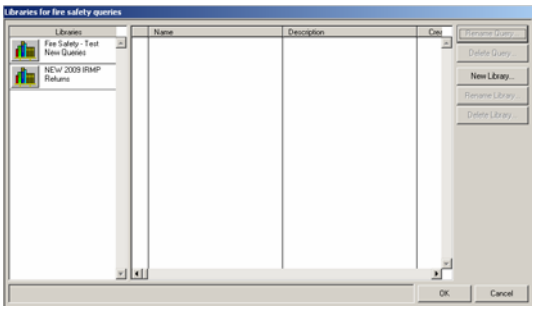
The 'Personnel Queries' system allows the user to section the information held within the system and 'Save' the query in a Library, access to which is completely user-definable.

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.

Within 'Personnel Queries'

- Click onto the 'Open' icon



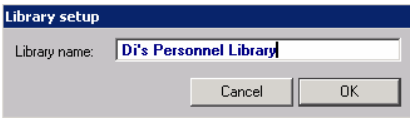
As you can see there is already a list of 'Libraries'

Add a Library

- Click onto the 'New Library' button

The 'Library Setup' box will appear

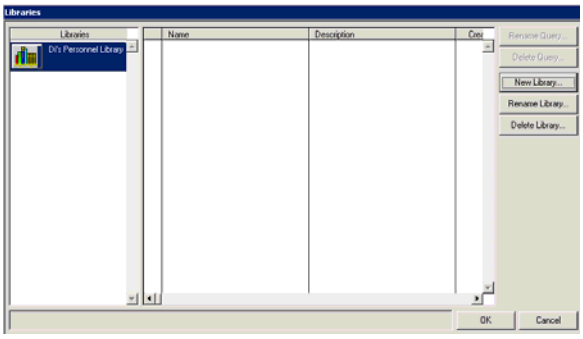
- Enter the 'Name' of your library
- Click onto the 'OK' button



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



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 1st April (enter the year)

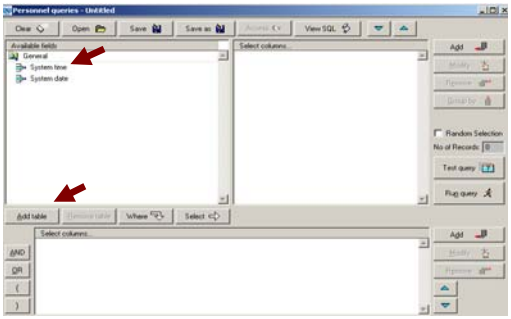
For this Query to work we will need all of what is displayed below

Availability Tables:	***Selected Columns:***	***Defined Selected Columns:***
Personnel *Current Posting Details* *Service History*	*Surname* *First Name* *Service Number* *Ava or Una, Leave Blank* *Reason for Leaving* *Finish Date*	*Value of Ava or Una, Leave Blank Equals to Ava* *AND* *Value of Finish Date Greater than or Equal to 01/04/enter the year* *AND* *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

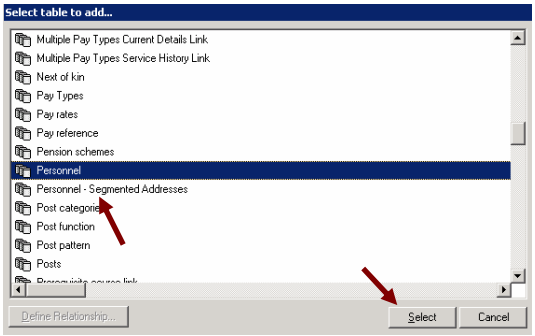
These are defaults

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

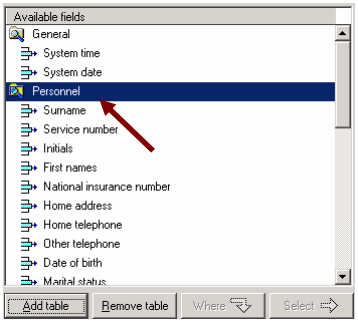
- Highlight the option of 'General' folder
- Click on 'Add Table' button at bottom of window 1

This will open up the 'Available Fields' option window, which is a list of 'All Tables' of 'Search Criteria' available.

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 a 'Table' that you wish 'Search' on by highlighting i.e. 'Personnel'
- Click onto the 'Select' button



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…

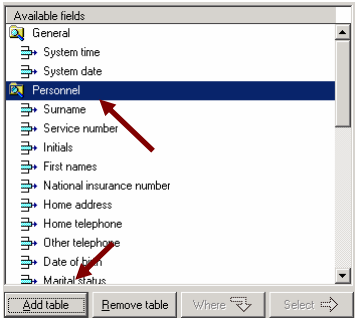
'**Add' more 'Tables'**

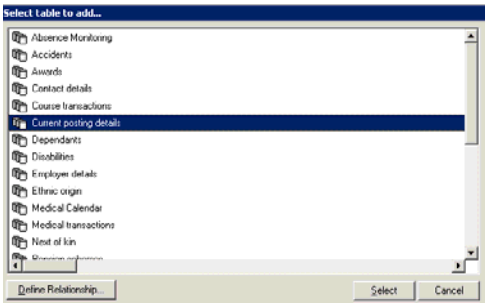
Adding Additional Tables to the Query

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



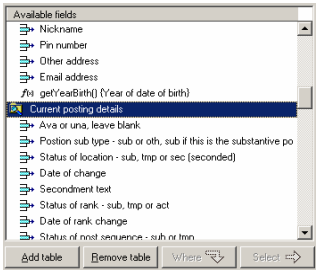


- Select 'Current Posting Details'

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

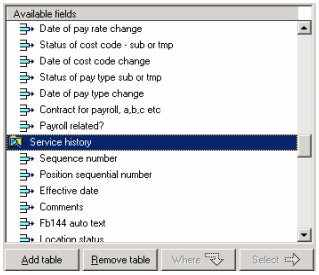
- Click onto the 'Select' button

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



Repeat the above instruction but this time…

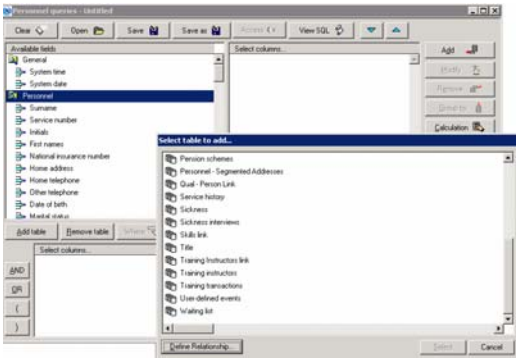
- Click onto the ‘Current Posting Details’ folder
- Click onto Add Table
- Select Service History



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

- Click onto the Personnel folder
- Click onto Add Table

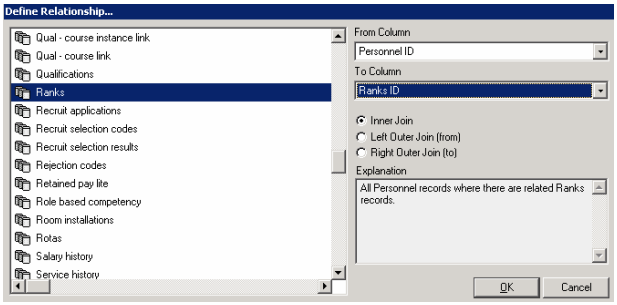
- Click onto Define Relationship button



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



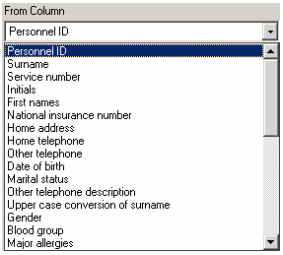
On the left of the window there is a list of all the tables that are in the 'Personnel' window.

Scroll down to the table

- Select Ranks option

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

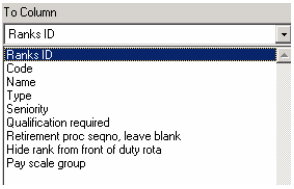
From Column



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

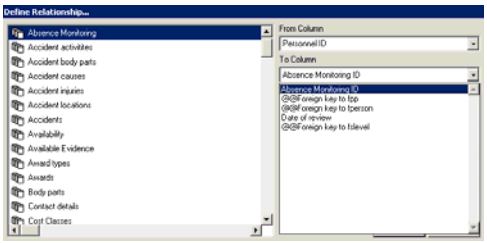
To Column



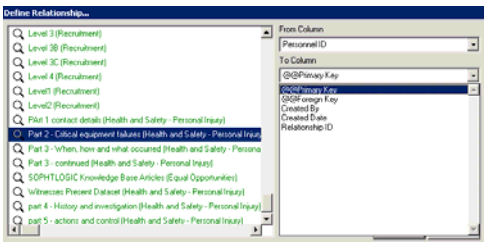
The 'To Column' is a list that will change depending what folder you choose on the left of the Define Relationship box. This is where you link the table to the table in the 'From' option.

To Column > Select Ranks ID

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.



Linking the 'Personnel ID' to the 'Absence Monitoring ID' in the 'Premises' option.



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

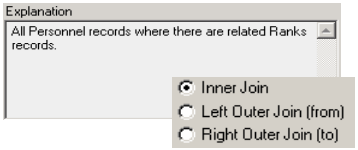
This is where you join the stand alone tables e.g. ‘Audit Form’ ‘Health and Safety’, ‘Recruitment’, ‘Attributes’ or ‘Equal Opportunity’ etc to a defined field.

‘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

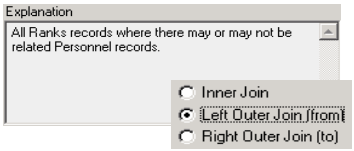
The second part of ‘Define Relationship’; ‘Inner Join’ and ‘Outer Join’, does apply to ‘Fire Safety’. Look at the right hand side of this window there are 3 option buttons. These are called ‘Join’ buttons. Each option will have an ‘Explanation’ box with a brief description of what the ‘Inner Join’ options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

INNER JOIN

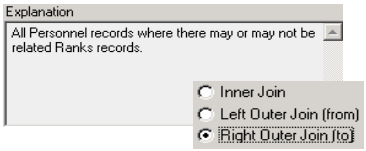


The ‘INNER JOIN’ only acts on rows were ‘All ‘Qualification’, ‘Attributes’ Absence Monitoring etc….’ records where there are related ‘Personnel Records’.

OUTER JOIN



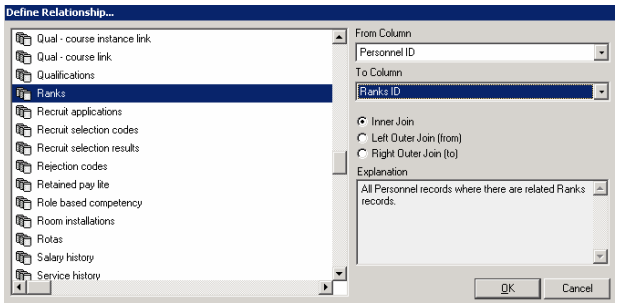
The ‘LEFT OUTER JOIN (FROM)’ only acts on rows were ‘All ‘Qualification’, ‘Attributes’ Absence Monitoring etc….’ records where there may or may not be related ‘Personnel Records.’



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….’

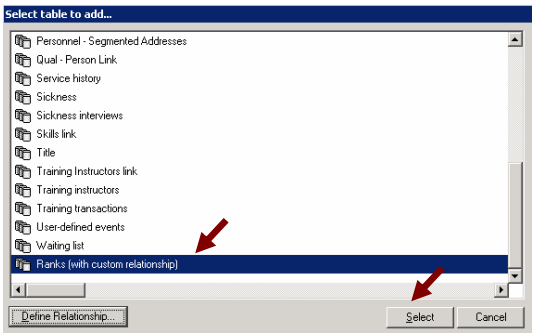
- Click onto Right Outer Join (to) option

Once you have finished setting up the ‘Defined Relationship’



- Click onto the ‘OK’ button

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



- Click onto the ‘Table’
- Click onto the ‘Select’ button

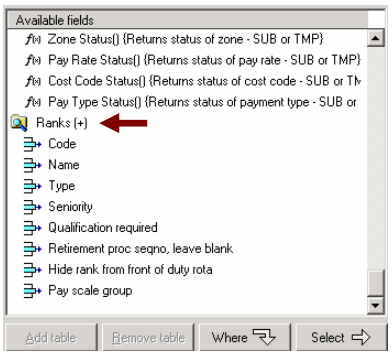
The window will automatically defaults to the top of the Ranks list.

Scroll down the left hand column

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

One difference…

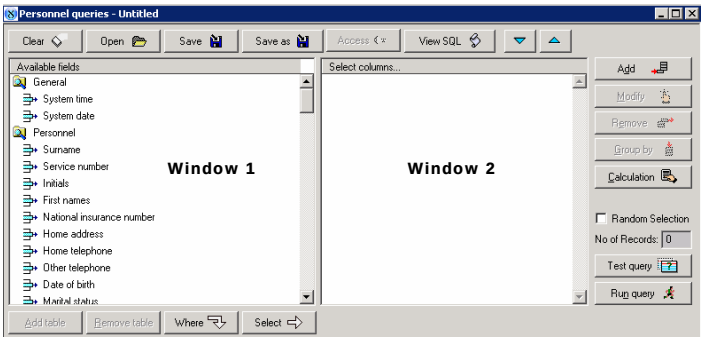
There is a plus (+) sign next to the Ranks folder. This means that this table is linked to the Available field.



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’

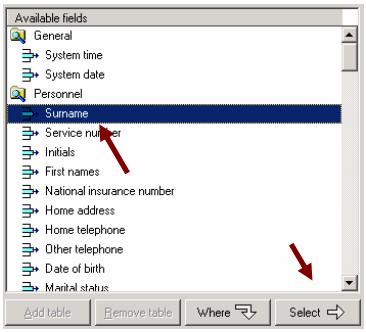
SELECTED COLUMNS: window two



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

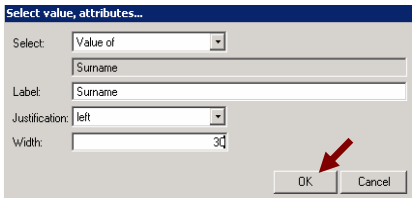


- Double click onto the 'Surname' sub options

Or

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

The 'Select Value, Attributes' window will appear

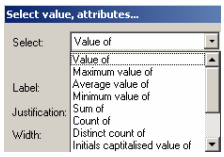


- Select drop down arrow gives you options to

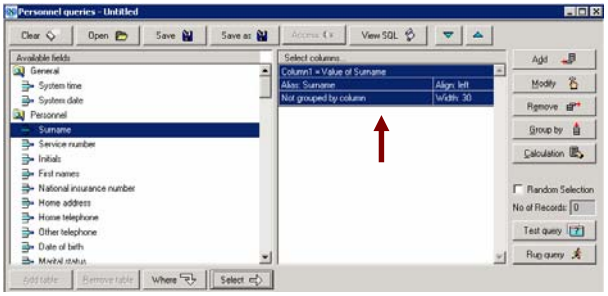
'Value Of', 'Minimum', 'Average', 'Maximum Value Of', 'Sum Of', 'Count Of' etc…

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.

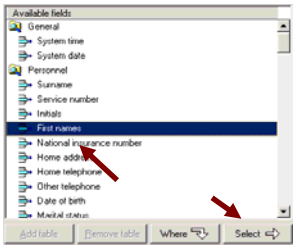


- Click onto the 'OK' button



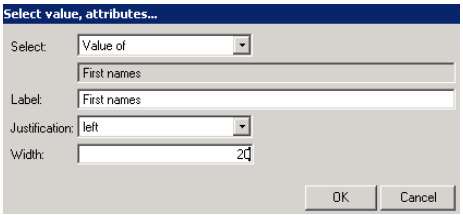
As you can see the 'Surname' has appeared in the 'Select Column' window (2) on the right.

Within the Personnel folder

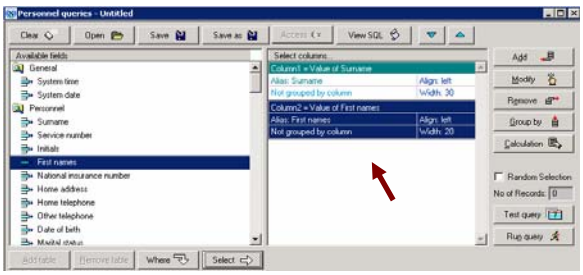


- Click onto First Name > Value of
- Click onto the Select button

This will open up the 'Select Value Attributes' window



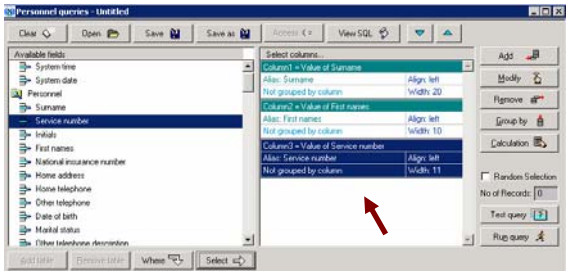
- Click onto the 'OK' button



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



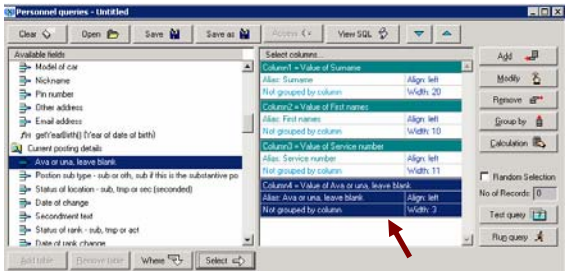
- Click onto 'Service Number' > Value of
- Click onto the Select button

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



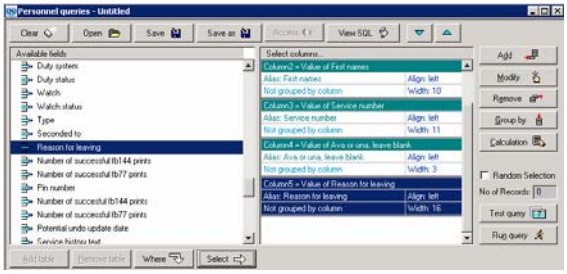
- Click onto 'Ava or Una, Leave blank' > Value of
- Click onto the Select button

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

Service History folder



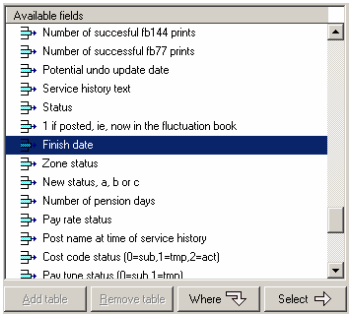
- Click onto Reason for Leaving > Value of
- Click onto the Select button

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

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'

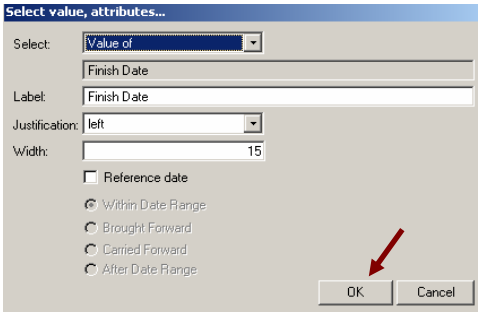
The default is 'Within Date Range'

If you do wish to change this

- Click onto the 'Reference Date' box

This will activate the options

- Select one of the options



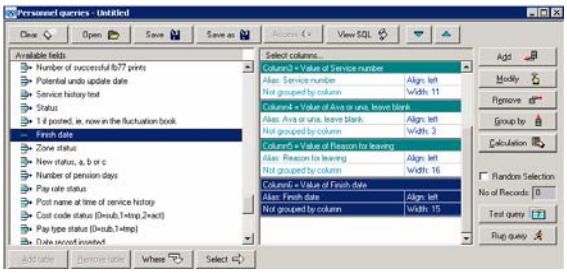
To grey out the other options

- 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

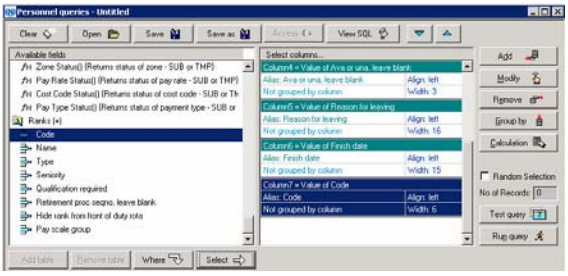
As you can see ‘Finish Date’ has appeared as column 6 under the ‘Reason for Leaving’ column



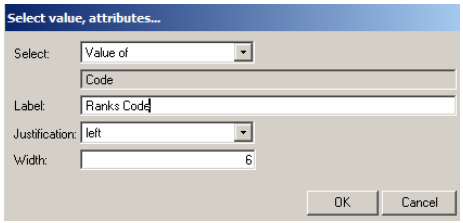
At this stage, not all queries need to be defined or set to a date range.

Ranks folder

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



This will open up the ‘Select Value Attributes’ window



In the Label box I have added ‘Ranks’ to the column heading

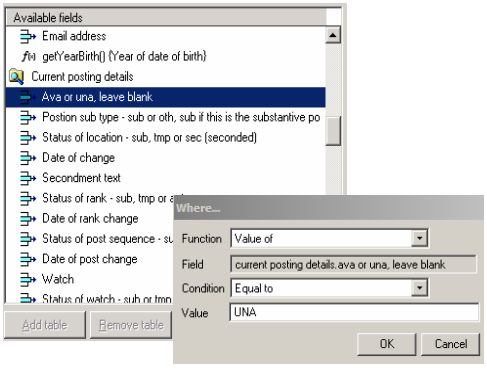
- Click onto the ‘OK’ button

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

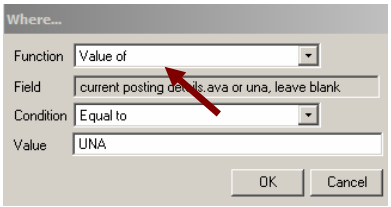
Define Selected Columns – Where:

In the 'Current Posting Details' folder

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



This will open the value 'Where' window



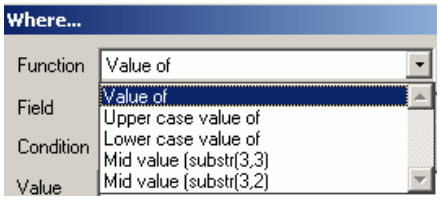
The 'Function' box is always defaulted to 'Value of'

- Click onto the Functions Arrow

A drop down menu of options will appear

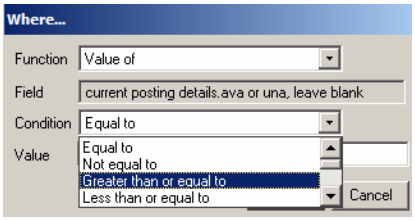
A drop down list will appear > change if necessary

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



The Condition is always defaulted to 'Equals to'

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



Equals to	= Numbers / Dates
Not equals to	= Numbers / Dates
Greater that or equals to	= Numbers / Dates
Less than or equals to	= Numbers / Dates
Begins with	= Text
Ends with	= Text
Contains	= Text
Is empty	= Leave Blank
Is not empty	= Leave Blank
Does not begin with	= Text
Does not end with	= Text
Does not contain	= Text

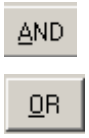
For a Date Range: 'Greater that or equals to' and 'Less than or equals to' is commonly used

For Text: 'Begins with' or 'Contains' are commonly used

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
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
OR
(Type = A AND Location = B)

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

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

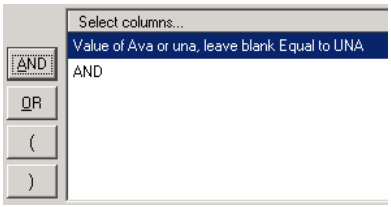
Sickness where the Value of 'Finish Date' is 'Greater than or equal to' '01/04/09' AND Value of 'Finish Date' is 'Less than or equal to' '31/03/10'

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)

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…

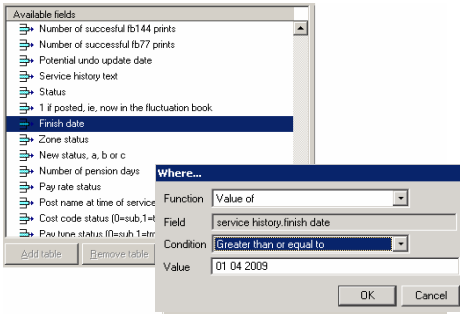
- Click on the 'Add' button

- Select another option from 'Available Fields' window

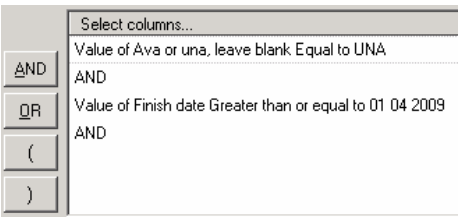
Either way

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

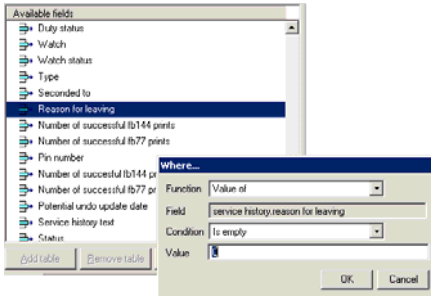


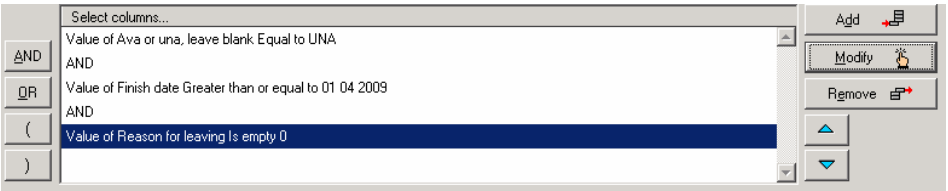
- Click onto either the AND / OR button

For this example I am using the 'AND' button

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





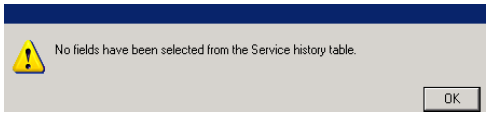
Once all you have defined your query

Test and Run Query Buttons

To 'Test Query'

- Click onto the 'Test Query' button

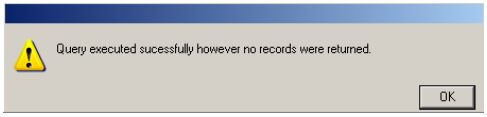
A dialog box may pop up saying you have not used anything from tables that was selected in the 'Available Fields' window. You might not have used anything from that table in the column window (2) but did use one or so of the fields from the table in the 'Where' window (3) or it was part of the linking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

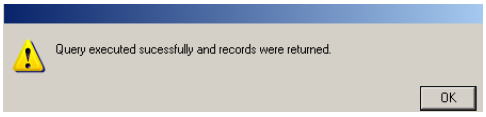
This lets you know not to run query as there are no records returned

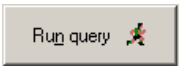


- Click onto the OK button

If there are records to return

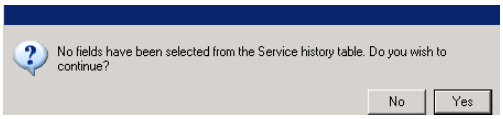
A dialog box will appear letting you know that there were records returned



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

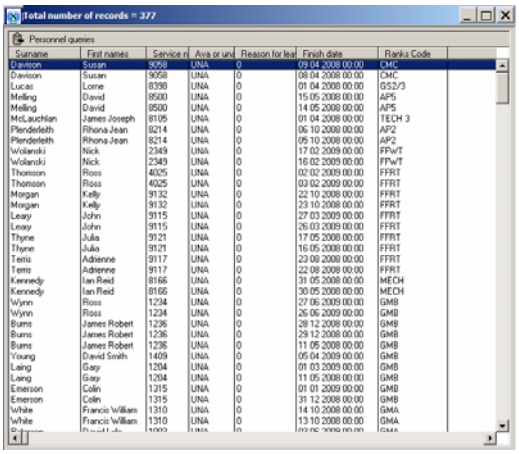
Same as above

- 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 while…

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



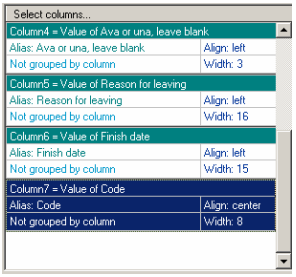
Surname	First names	Service n	Ava or unl	Reason for lea	Finish date	Ranks Code
Davison	Susan	9058	UNA	0	09 04 2008 00:00	CMC
Davison	Susan	9058	UNA	0	08 04 2008 00:00	CMC
Lucas	Lorne	8398	UNA	0	01 04 2008 00:00	GS2/3
Melling	David	8500	UNA	0	15 05 2008 00:00	AP5
Melling	David	8500	UNA	0	14 05 2008 00:00	AP5
McLauchlan	James Joseph	8105	UNA	0	01 04 2008 00:00	TECH 3
Plenderleith	Rhona Jean	8214	UNA	0	06 10 2008 00:00	AP2
Plenderleith	Rhona Jean	8214	UNA	0	05 10 2008 00:00	AP2
Wolanski	Nick	2349	UNA	0	17 02 2009 00:00	FPwT
Wolanski	Nick	2349	UNA	0	16 02 2009 00:00	FPwT
Thomson	Ross	4025	UNA	0	02 02 2009 00:00	FFRT
Thomson	Ross	4025	UNA	0	03 02 2009 00:00	FFRT
Morgan	Kelly	9132	UNA	0	22 10 2008 00:00	FFRT
Morgan	Kelly	9132	UNA	0	23 10 2008 00:00	FFRT
Leary	John	9115	UNA	0	27 03 2009 00:00	FFRT
Leary	John	9115	UNA	0	26 03 2009 00:00	FFRT
Thyne	Julia	9121	UNA	0	17 05 2008 00:00	FFRT
Thyne	Julia	9121	UNA	0	16 05 2008 00:00	FFRT
Terris	Adrienne	9117	UNA	0	23 09 2008 00:00	FFRT
Terris	Adrienne	9117	UNA	0	22 08 2008 00:00	FFRT
Kennedy	Ian Reid	8166	UNA	0	31 05 2008 00:00	MECH
Kennedy	Ian Reid	8166	UNA	0	30 05 2008 00:00	MECH
Wynn	Ross	1234	UNA	0	27 06 2009 00:00	GMB
Wynn	Ross	1234	UNA	0	26 06 2009 00:00	GMB
Burns	James Robert	1236	UNA	0	28 12 2008 00:00	GMB
Burns	James Robert	1236	UNA	0	29 12 2008 00:00	GMB
Burns	James Robert	1236	UNA	0	11 05 2008 00:00	GMB
Young	David Smith	1409	UNA	0	05 04 2009 00:00	GMB
Laing	Gary	1204	UNA	0	01 03 2009 00:00	GMB
Laing	Gary	1204	UNA	0	11 05 2008 00:00	GMB
Emerson	Colin	1315	UNA	0	01 01 2009 00:00	GMB
Emerson	Colin	1315	UNA	0	31 12 2008 00:00	GMB
White	Francis William	1310	UNA	0	14 10 2008 00:00	GMA
White	Francis William	1310	UNA	0	13 10 2008 00:00	GMA

To close the results window

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

Count Of

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



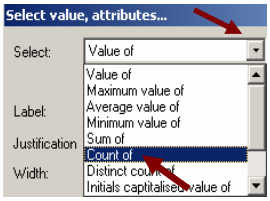
- Double click onto the 'Code' column

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

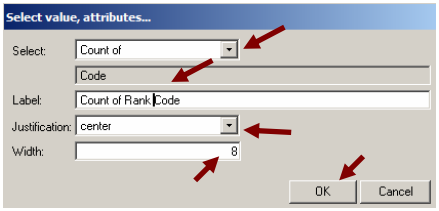
- Click onto 'Count Of'

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

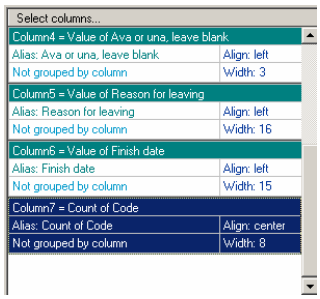
- 'Count Of' has now appeared into the 'Select' box

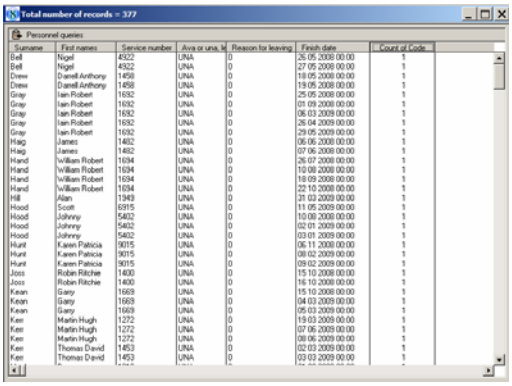
I have also changed the

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



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





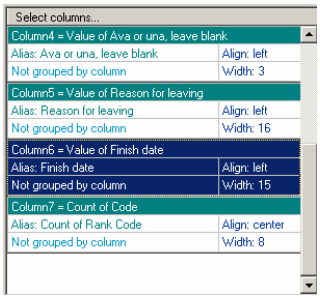
- Click onto the 'Run Query' button

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

.

Let's add another 'Count of'



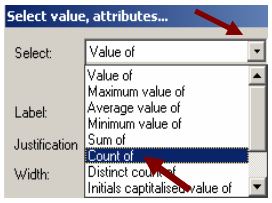
- Double click onto the 'Finish Date' column

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'

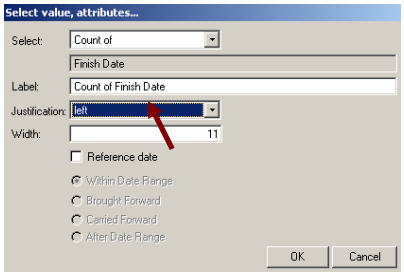
- Click onto the 'Select' arrow



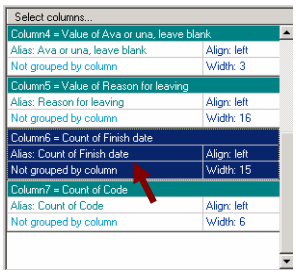
A dropdown menu will appear

- Click onto 'Count Of'

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



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



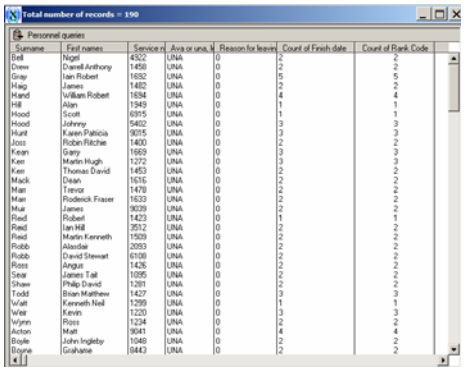
As you can see the changes to the 'Finish Date', in column 6, have been changed.

- Click onto the Run icon

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.

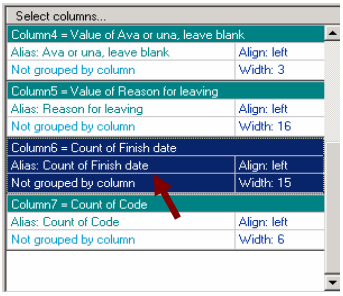
The 'Finish Date' heading has changed to 'Count of Finish Date'.

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

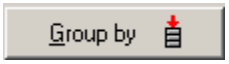


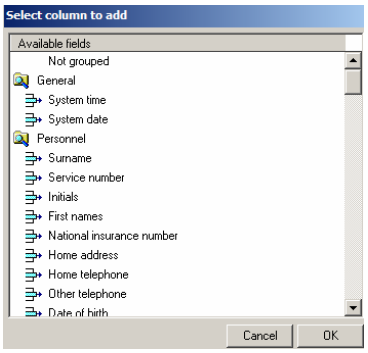
Group By

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



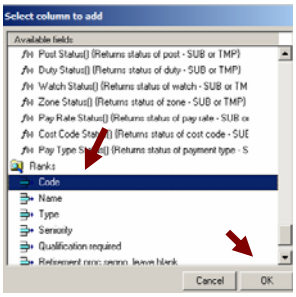


The 'Select Column to Add' window will appear

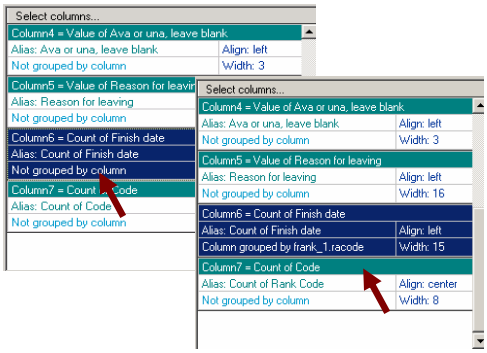
Notice the tables available in this window are the same tables you selected in Availability Fields (window one).

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

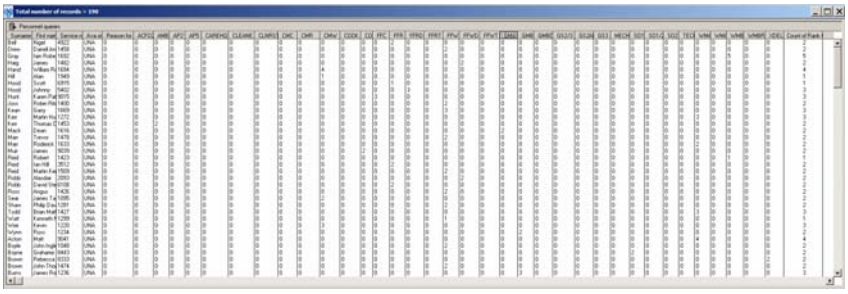


The selected field will now show in right window (2), (selected columns window)

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.

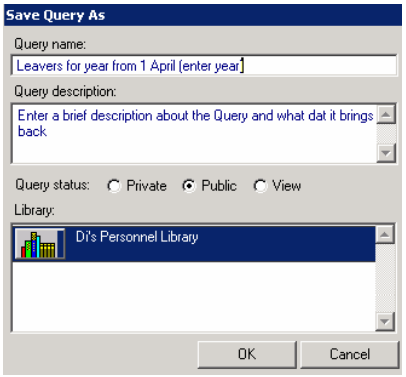


Saving Queries

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'

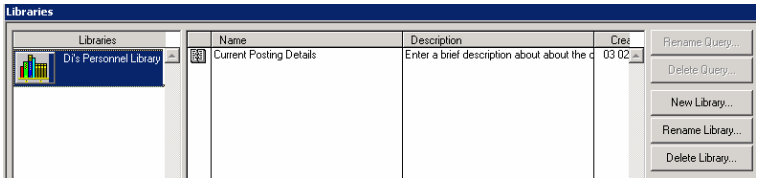
If however, the query is to be accessible to all users

- 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.



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…

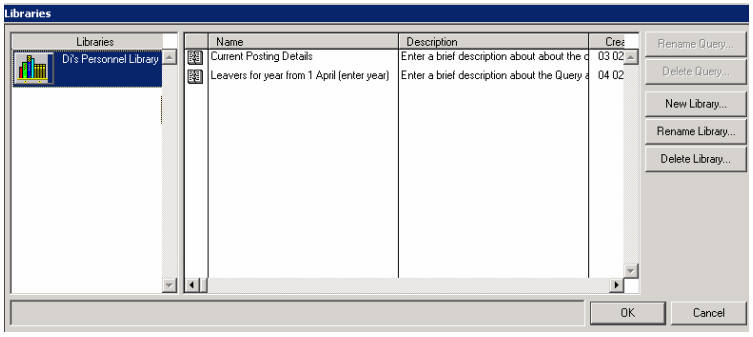
The system will return to the 'Fire Safety Queries' window and the heading will have changed from 'Untitled' to the name you 'Saved' the query at.

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'



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 Run'

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

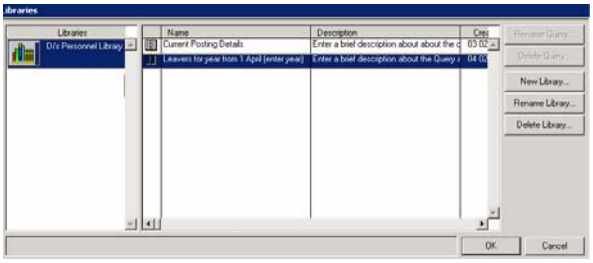
Save As - Duplicate Amended Queries

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 the original Query

- Click onto the 'Open' icon

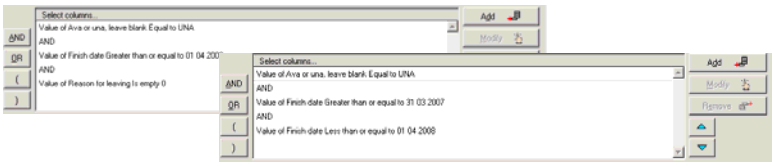
- Click onto the 'Library' the query is saved in
- Select the 'Query'
- Click onto the 'OK' button



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

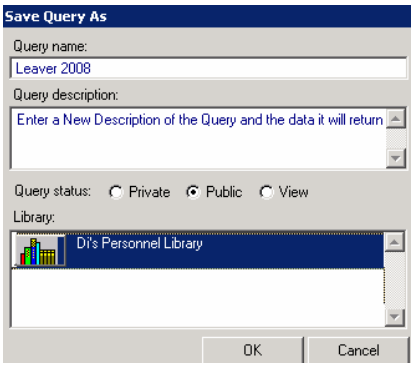


- Click the **'Save As'** button

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.

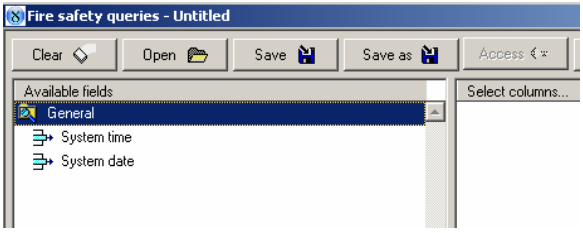
The system returns to the 'Fire Safety Queries' window

As you can see the query name has changed

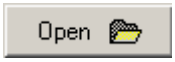
Opening Existing Queries

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'



- Click on the 'Open' button

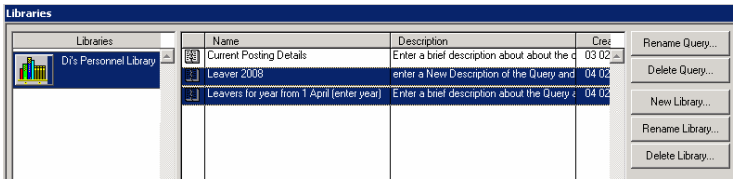


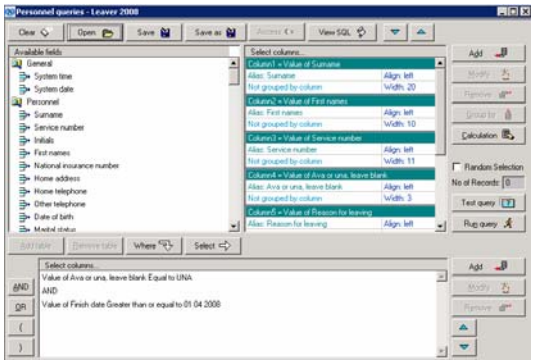
The 'Libraries for Fire Safety Queries' window will display

- 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





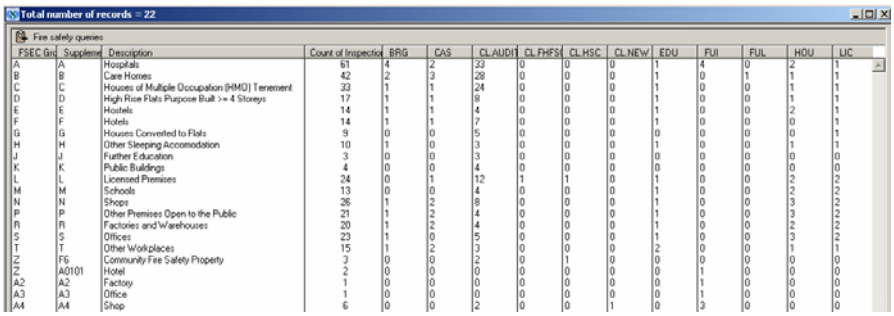
The query will appear in the FSQ window for you to execute, amend etc...

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



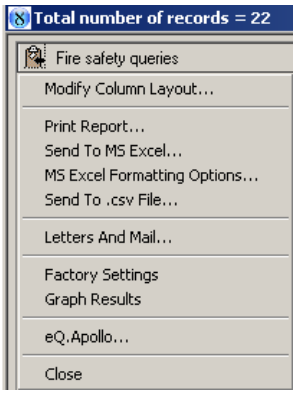
FSEC Gro	Suppleme	Description	Count of Inspectio	BRG	CAS	CL.AUDIT	CL.FHFS	CL.HSC	CL.NEW	EDU	FUI	FUL	HOU	LIC
A	A	Hospitals	61	4	2	33	0	0	0	1	4	0	2	1
B	B	Care Homes	42	2	3	28	0	0	0	1	0	1	1	1
C	C	Houses of Multiple Occupation (HMO) Tenement	33	1	1	24	0	0	0	1	0	0	1	1
D	D	High Rise Flats Purpose Built >= 4 Storeys	17	1	1	8	0	0	0	1	0	0	1	1
E	E	Hostels	14	1	1	4	0	0	0	1	0	0	2	1
F	F	Hotels	14	1	1	7	0	0	0	1	0	0	0	1
G	G	Houses Converted to Flats	9	0	0	5	0	0	0	0	0	0	0	1
H	H	Other Sleeping Accomodation	10	1	0	3	0	0	0	1	0	0	1	1
J	J	Further Education	3	0	0	3	0	0	0	0	0	0	0	0
K	K	Public Buildings	4	0	0	4	0	0	0	0	0	0	0	0
L	L	Licensed Premises	24	0	1	12	1	1	0	1	0	0	2	2
M	M	Schools	13	0	0	4	0	0	0	1	0	0	2	2
N	N	Shops	26	1	2	8	0	0	0	1	0	0	3	2
P	P	Other Premises Open to the Public	21	1	2	4	0	0	0	1	0	0	3	2
R	R	Factories and Warehouses	20	1	2	4	0	0	0	1	0	0	2	2
S	S	Offices	23	1	0	5	0	0	0	1	0	0	3	2
T	T	Other Workplaces	15	1	2	3	0	0	0	2	0	0	1	1
Z	F6	Community Fire Safety Property	3	0	0	2	0	1	0	0	0	0	0	0
Z	A0101	Hotel	2	0	0	0	0	0	0	0	1	0	0	0
A2	A2	Factory	1	0	0	0	0	0	0	0	1	0	0	0
A3	A3	Office	1	0	0	0	0	0	0	0	1	0	0	0
A4	A4	Shop	6	0	0	2	0	0	1	0	3	0	0	0

In the top left hand corner

- Click onto the 'Brown Clipboard' icon

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:

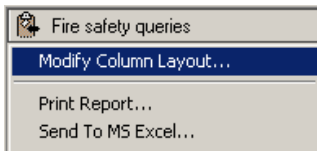


How to Modify Column Layout

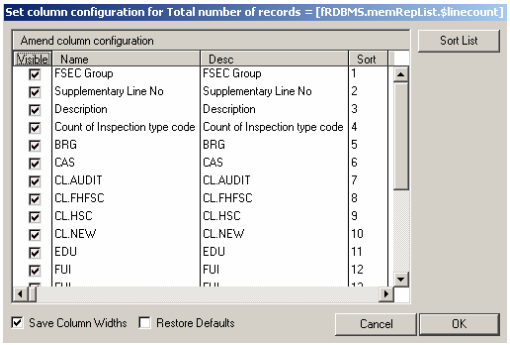
Please refer to the 'Brown clipboard' button entitled 'Fire Safety Queries'

- Click the 'Brown clipboard' button

A drop down menu will display

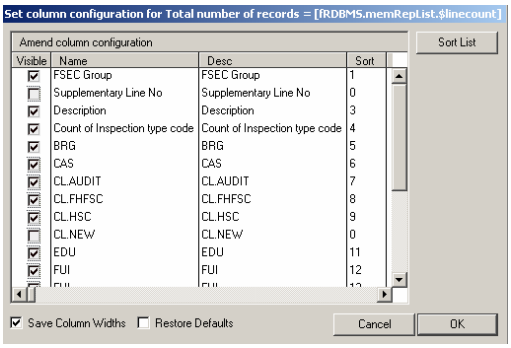


- Click onto 'Modify Column Layout'

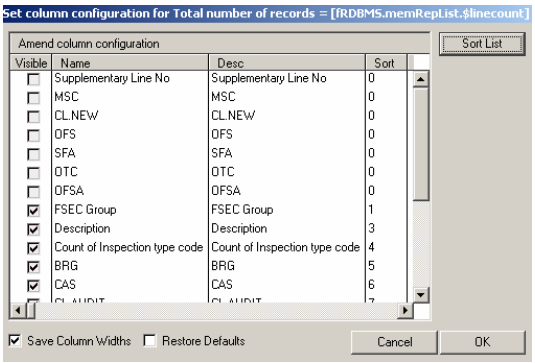


Depending on the columns checked will depend on the columns visible in the 'Fire Safety Queries' result window

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



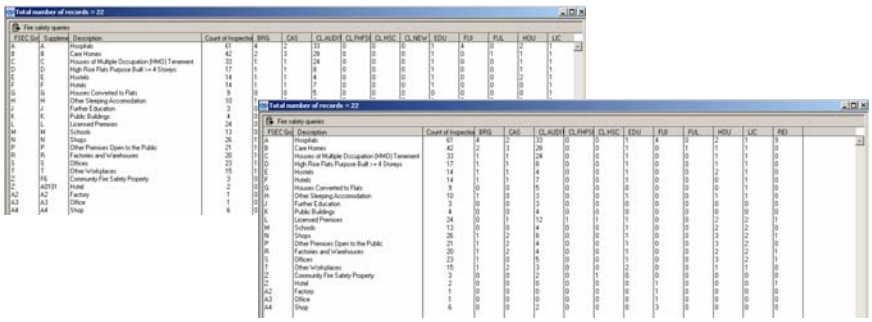
Remove the Ticks from the check boxes of the columns you 'Do Not' want displayed



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

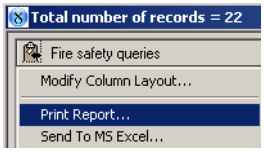


Restore Defaults check box by ticking this box it will put the ticks back into all the check boxes all columns will be visible.

How to Print a Report

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

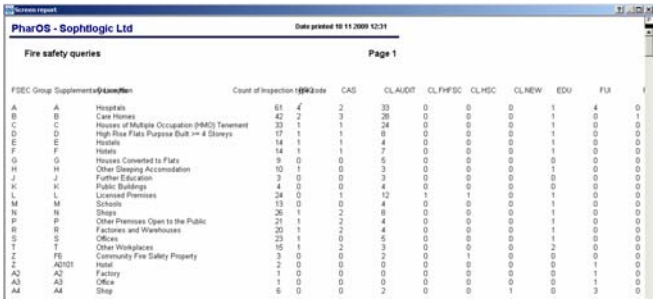
- Click the 'Brown clipboard' button



A drop down menu will display

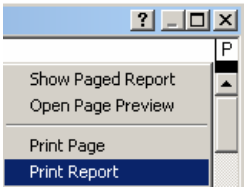
- Select the second option 'Print Report'

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



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

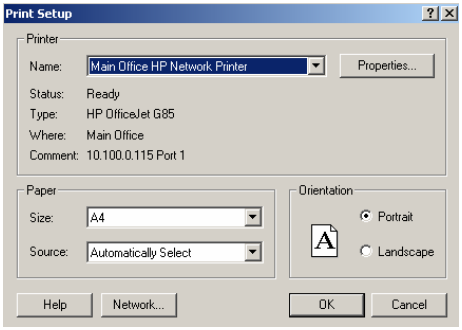
- To print the report click the 'P' button positioned in the top right hand corner of the window.



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.

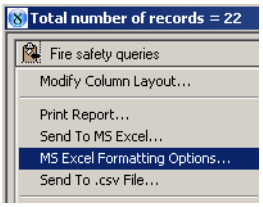
How to Format MS Excel Options

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’

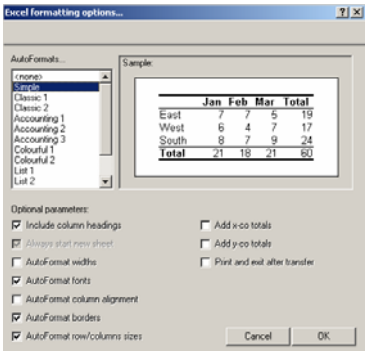


The system will open the ‘Excel formatting options’ window

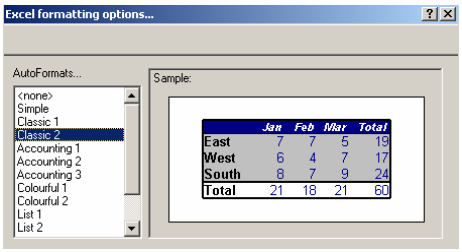
- Go to the ‘Auto formats’ list display

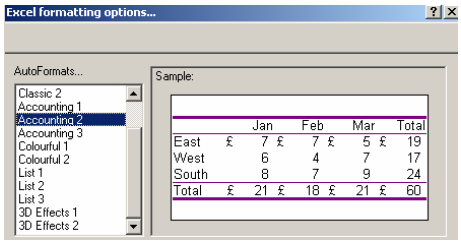
The ‘AutoFormat’ highlighted will display in the ‘Sample’ preview field

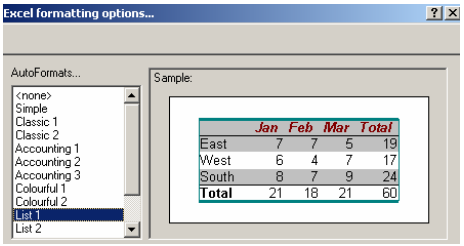
- Select the required ‘Auto format’ option.
- Click the ‘OK’ button if the Excel Formatting Options require saving.

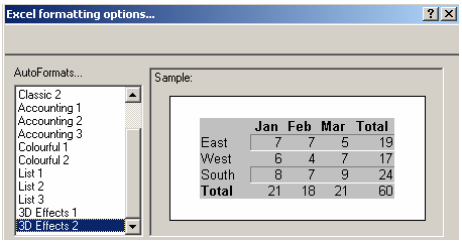


Please note: the ‘Excel Formatting’ option that is selected will not be visible until the ‘Send to MS Excel’ facility has been used. As shown in the examples on the next page.







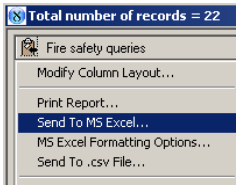


How to Send to MS Excel

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

- Click the 'Brown clipboard' button

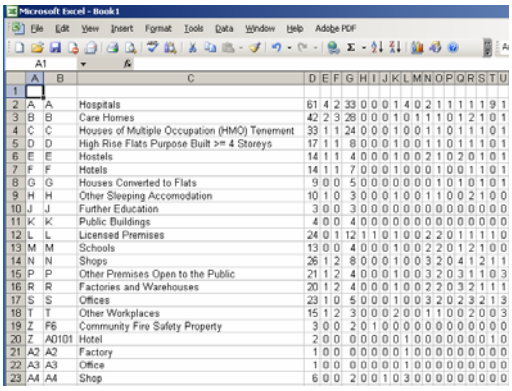
A drop down menu will display



- 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.

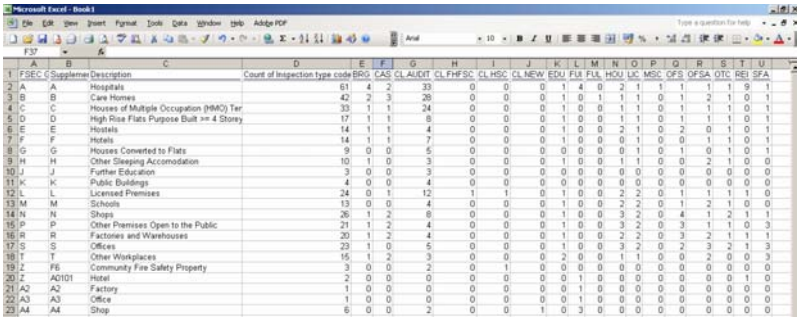
- Click the 'Microsoft Excel' button



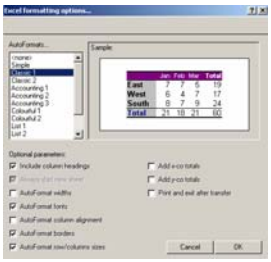
Microsoft Excel will open and the information in the 'Fire Safety Queries' results window will now be displayed in a 'Microsoft Excel' spreadsheet.

In this example the headings have not been included…

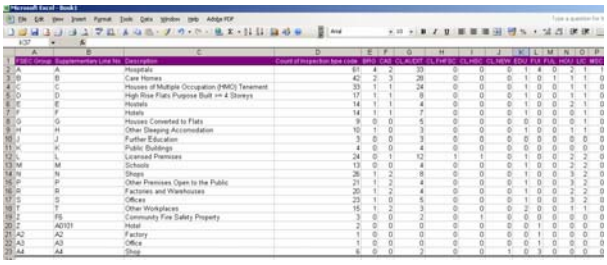
If this is the case, go to 'MS Excel Formatting Options' make sure there is a tick in the 'Include Column Headings' check box in the 'Optional Parameters' or click onto one of the 'Auto Formats' e.g. 'simple'.

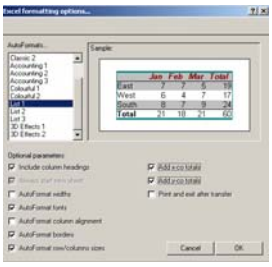


Below are a few ‘MS Excel Formatting Options’ examples.

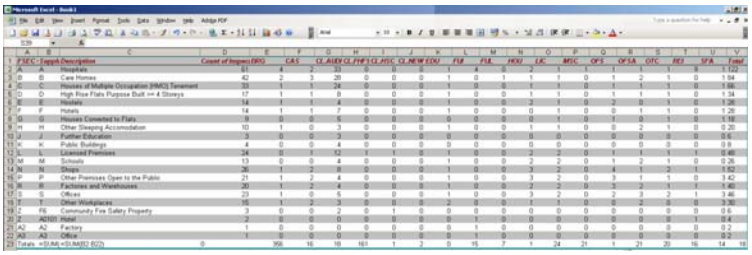


‘Class 1’ layout





‘List 1’ layout



How to send data to CSV files

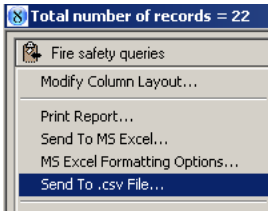
(Comma separated values – this is a text file that will open in Excel by default but can also be opened with a simple text editor, such as notepad. This is a standard file type for imports into other applications, such as Access.)

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

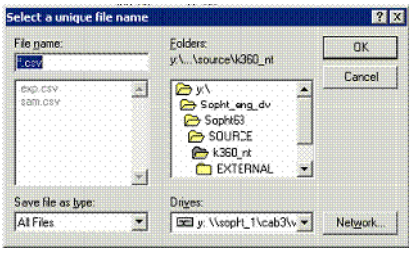
- Click the ‘Brown Clipboard’ button

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.

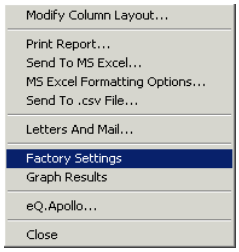
If you do not enter the extension '.csv' after the file name, this will automatically be added.

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

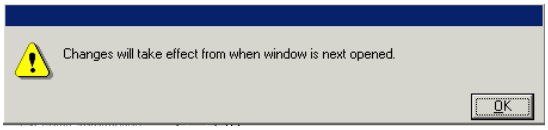
When the modify column layout has been modified and there is a requirement to revert to the original layout, this can be achieved by selecting the 'Factory Settings' menu option on the brown clipboard icon.
Example:

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.

The following message will be displayed



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

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.

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.

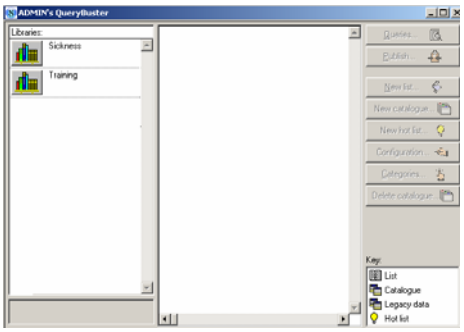
The Query Builder makes full use of graphical user interface facilities and data is made available using common English terms rather than cryptic computer terminology. There is no need for users of the system to learn query languages.

On the 'Global Navigator'

- Click onto the 'Query Manager' button

The 'Query Manager' button will appear in the toolbar

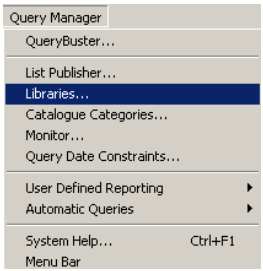
First of all let's look at 'Query Buster' to see what 'Libraries' (departments) you are able to see



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

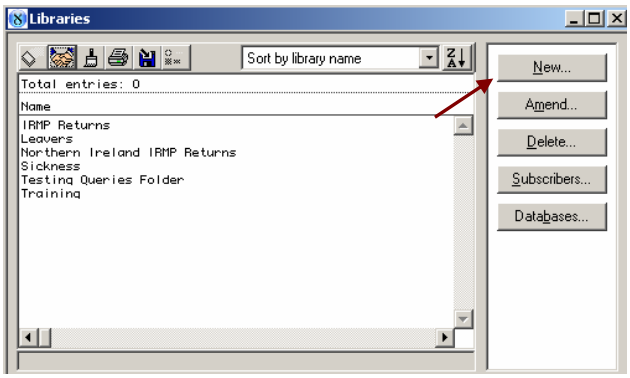
As you can see you can see 'Sickness' and 'Training' libraries

- Close the 'Query Buster' window



- Click onto 'Query Manager'
- Click onto 'Libraries'

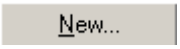
The ‘Libraries’ window will appear



As you can see there is already a list of ‘Libraries’

To add a library

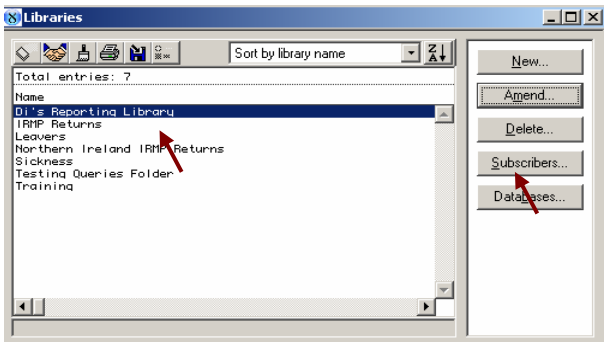
Add a Library

- Click onto the ‘NEW’ button 

The ‘Library Setup’ box will appear

- 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.

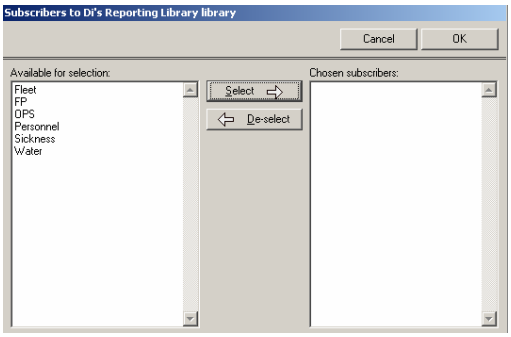


- Click onto the Subscribers button

Set-up a Users within the Libraries

Linking the Department to the Query Library

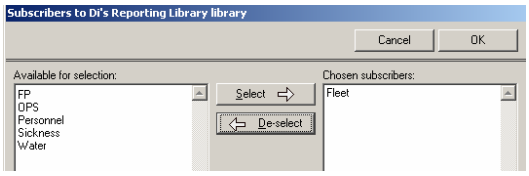
Based on what Queries the Brigade wants their staff to see

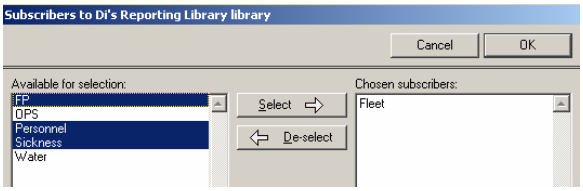


As you can see there are no Offices/Departments selected to view the Queries in this Library.

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

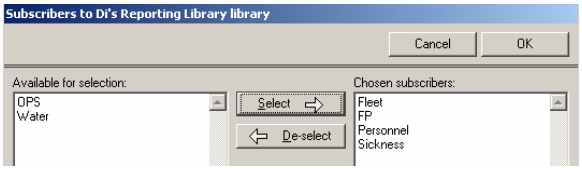
This will move the selected Libraries from the right window to the left window, giving the user within that library (department) access to the queries in your Library (department).





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

- Click onto the OK button



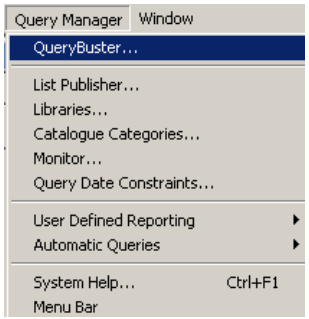
Remember: By 'Selecting' the libraries will able the users linked to that library (department) to see your queries in your library, but you will not be able to see their queries in their libraries (department) unless your library is selected to their library.

Check the Library has appeared in Query Buster

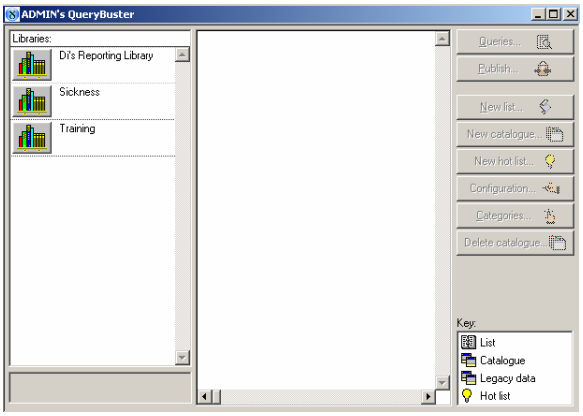
- Open Query Buster

From the Global Navigator load the Query Manager menu.

- Click onto Query Manager
- Click onto Query Buster



The Query Buster window will appear



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'.

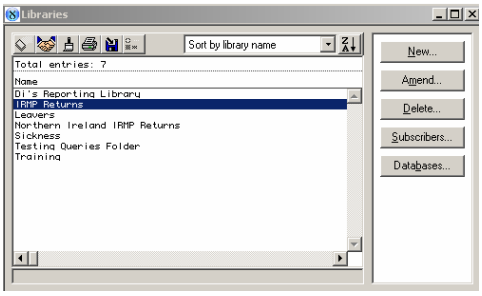
- Close this Query Buster window

In your tool bar:

- Click onto Query Manager
- Click onto Libraries

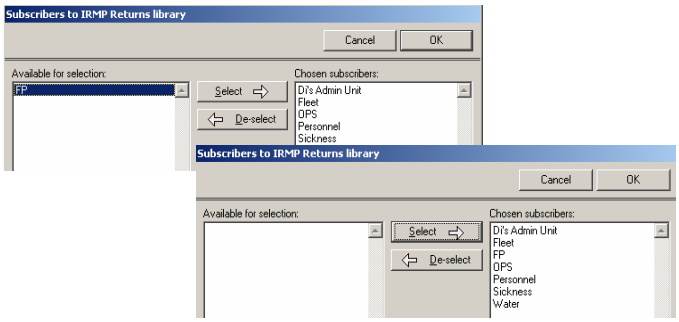
The Libraries window will open

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



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'

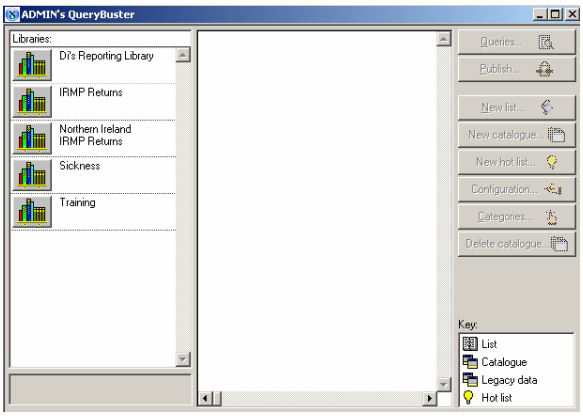
- Click OK

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

Let's go back to 'Query Buster'

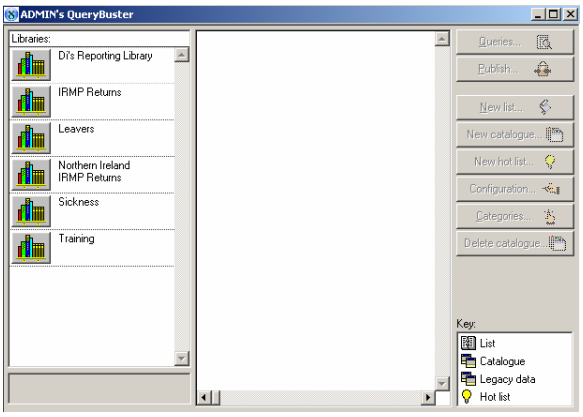
- Click onto Query Manager
- Click onto Query Buster

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.

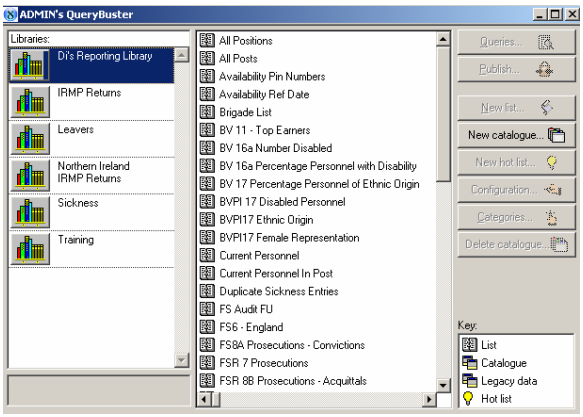


- Go back to Libraries
- Click onto the Leavers Library
- Click onto the Subscribe button
- Select an Option (Leavers)
- Click onto OK

- 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'.



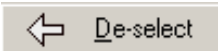
- Click onto one of the Department icon

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)

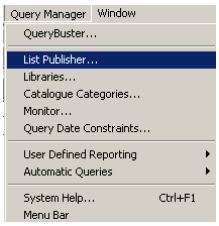
If you have selected too many Libraries follow the instructions above but this time:

- Click onto the De-Select button 

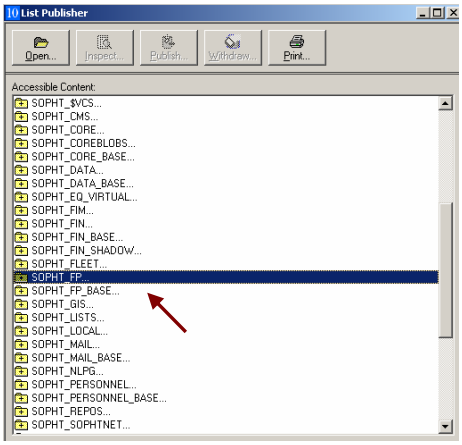
List Publisher

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.

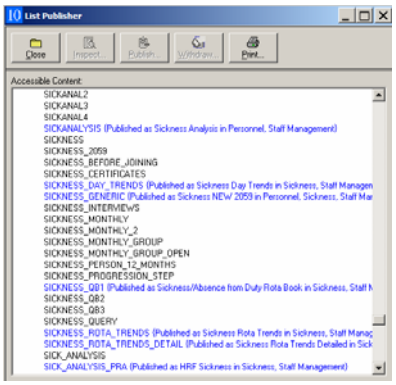
These folders relate to accounts e.g. 'Fire Safety', 'Personnel' related views would be held in the SOPHT_FP, or SOPHT_PERSONNEL' folder.

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

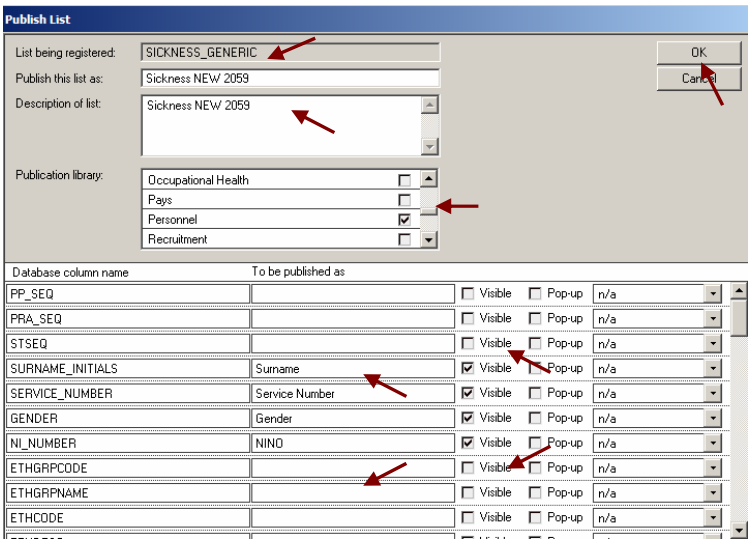
A list of published (in blue) and un-published (in black) - pre setup queries will appear

- Click onto a 'Query'



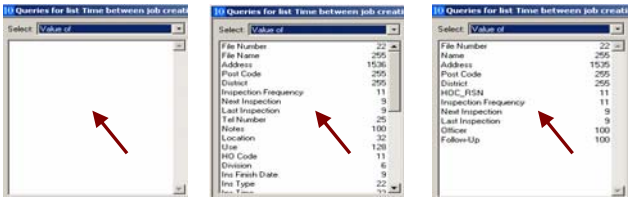
- Click onto the 'Publish' icon

The ‘Publish List’ window will appear



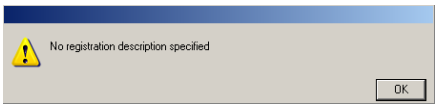
- In ‘Publish this list as’ box enter a ‘Name’ of the query
- In ‘Description of list’ box enter a brief ‘Description’ of the query
- In the ‘Publication library’ box tick into the checkbox of the ‘Libraries’ you want this query to appear
- In the ‘To be Published As’ column - Enter the Field Name (brief 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 -

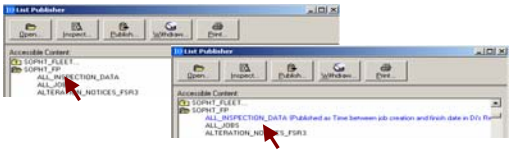


A ‘Processing’ dialog box will appear counting the fields selected then it will disappear

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

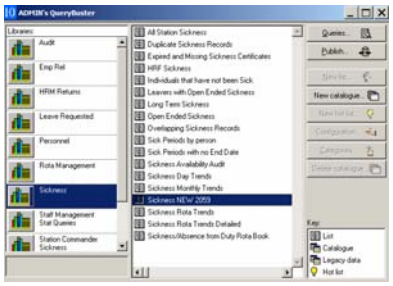


- Click onto the OK button



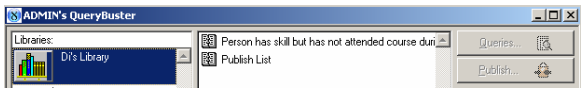
As you can see the query selected has changed from black text to blue with the path name where the query has been published.

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



Query Heading to Long

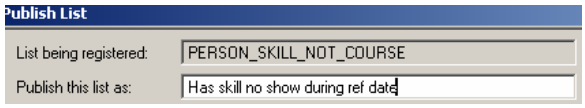
If the heading; like in this case is to long



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

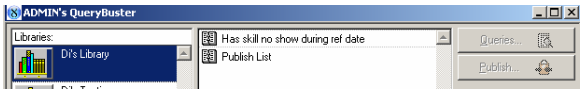
- Click onto the 'Query'
- Click onto the 'Publish' icon

In 'Publish this list as' box



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

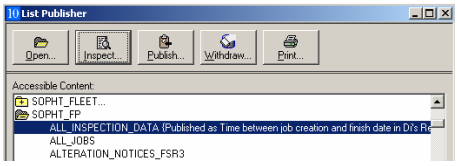
As you can see the name of the query is now shorter



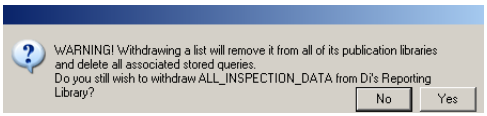
By repeating the above, you can insert as many queries; that are relevant to the Library, as you like.

Withdrawal Published Query form Library

To remove the query from your library



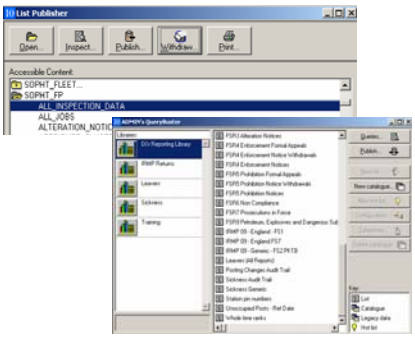
- Click onto the query
- Click onto the 'Withdrawal' icon



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.

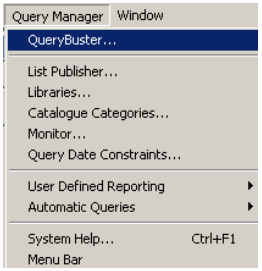
- Click onto the 'Yes' button



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'.

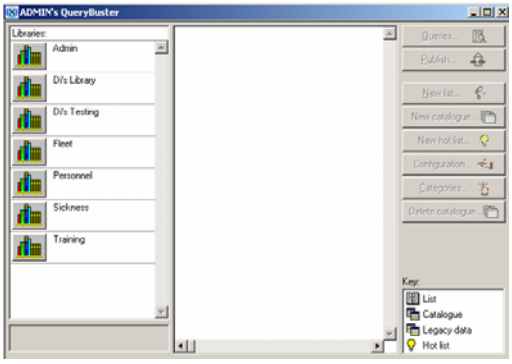
Query Busters

Running Queries



From the Global Navigator load the Query Manager menu.

- Click onto Query Manager
- Click onto Query Buster



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

To use the Queries, within the Libraries, that has been created.

To Publish a Query to a Library

The functionality is no longer appropriate

Folder Referencing

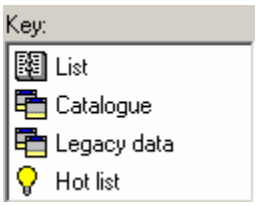
The functionality is no longer appropriate

Allows you to amend the Catalogue

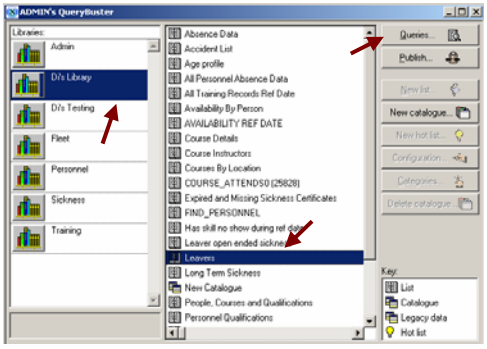
Categories within the Catalogue

Allows you to Delete the Catalogue

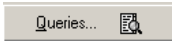
There is a 'Key' box in the bottom right hand corner to let you know what the pictures next to the Queries mean.



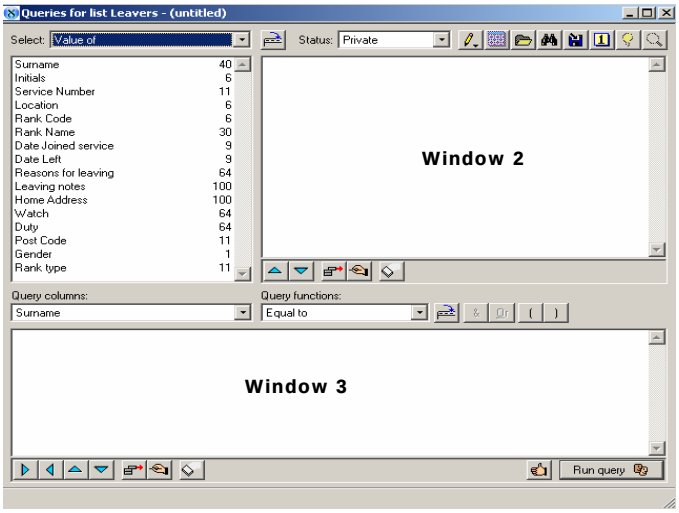
Query Window



- Select a Library and the Queries will appear.
- Select a Query from the list
- Click on Queries button.



The Query for list Leaver will appear – as shown



The 'Query for list' contains 3 windows

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

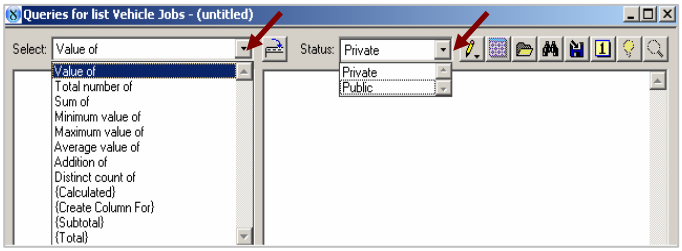
Multiple values can be selected from this list.

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



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

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

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

Clears the existing Query and Report Criteria

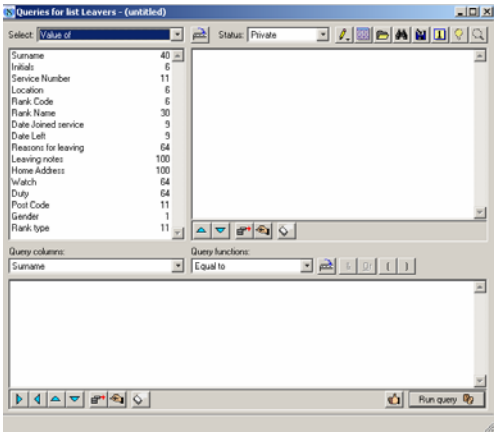
Set up Saved Query as an Automatic Query

Opens a Saved Query

Prompts for revision on an existing set of Data

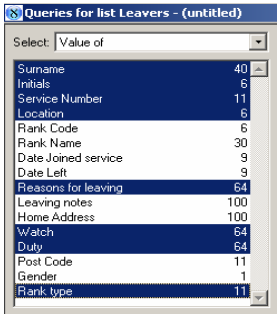
Saves the current Query (Shift + Click can be used to Save As – so as not to overwrite an open saved Query)

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.

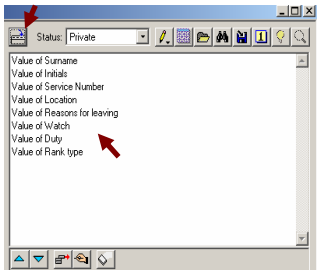
- Click to highlight multiple lines.



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.
	Remove Line
	Amend Line
	Clear List

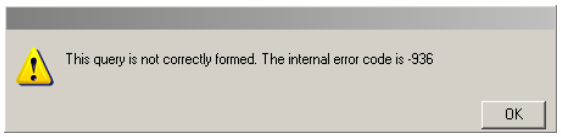
Verifying a Query is Correctly Formed

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:

If the query has errors an error message will appear.



Reasons That A Query May Not Run Correctly.

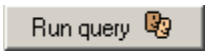
1. Normally errors are caused when the where clause is not correctly formed – i.e. there are open brackets without close brackets. Check that the where clause always reads:

   expression
   and/or
   expression
   and/or
   expression

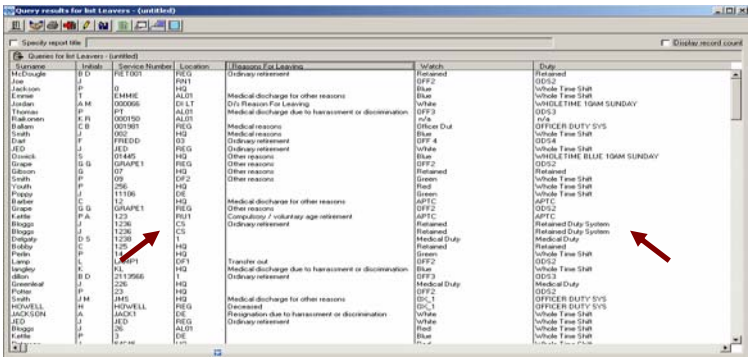
2. Functions may have been set incorrectly. For example a sum can only be performed on a number field. If a user tries to sum any field other than a number then it will cause an error.
3. There are errors in the underlying query. [Save first if required] To test this, take out any fields that have been 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
	Export to Excel. It is much better to use the export option from he brown clipboard to do this
	Prints the results
	Print labels from the results in the list
	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)
	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.

This will show at the bottom of the window

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

This will be used when printing the report.

- Click onto the Print icon

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

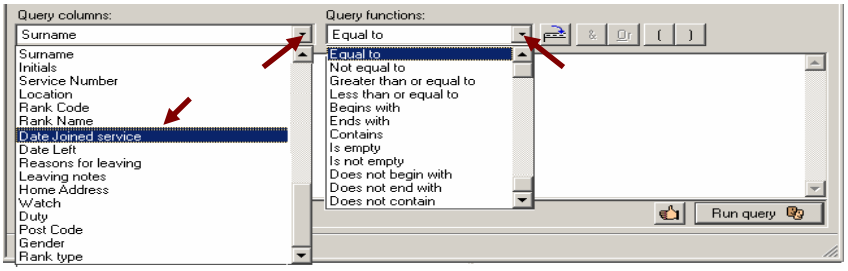
To Define the Query Further…

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
Or	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
	Remove Line
	Amend Line
	Clear List

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



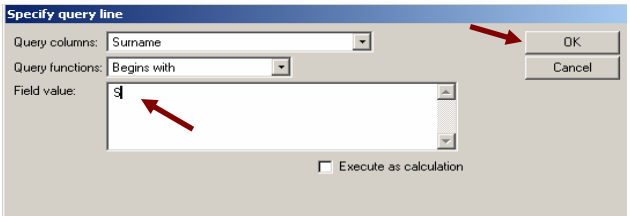
The Query Functions dropdown gives the following options to restrict data.

- Choose a field to restrict the data by.

As you can see I have chosen ‘Surname’ and ‘Begins With’

- 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.

To change either of these boxes

- Click onto the Arrow and choose from the dropdown list

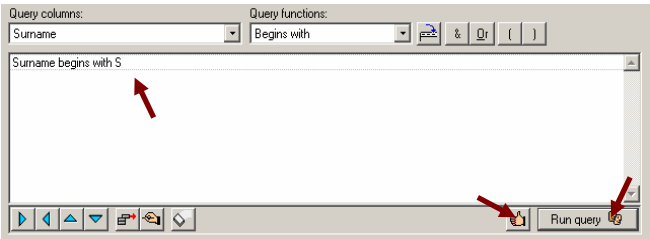
In the ‘Field Value’ box

- 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.

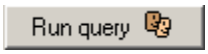
As you can see the ‘Surname Begins With ‘S’ has appeared in the Query window

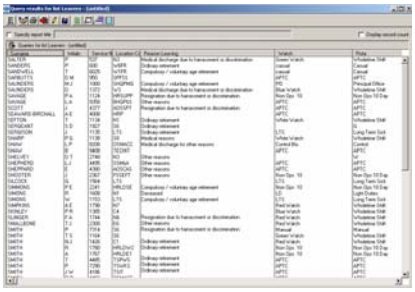


First before you ‘Run the Query’ you can check to see if the Query is correctly formed

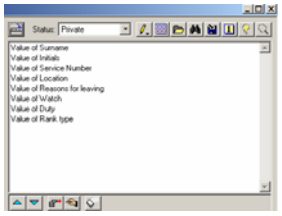
- Click onto the Thumbs Up button.

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

- Click onto the Run Query button 



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.

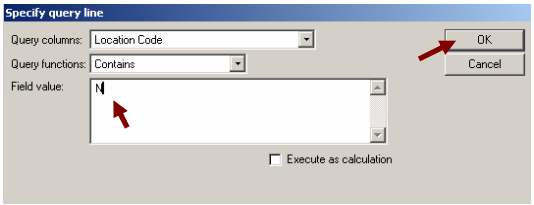
Now let's breakdown the Query further

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

- 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.



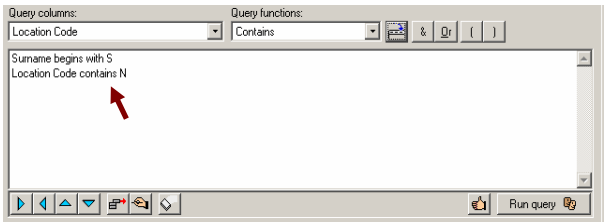
To change either of these boxes

- 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'



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'

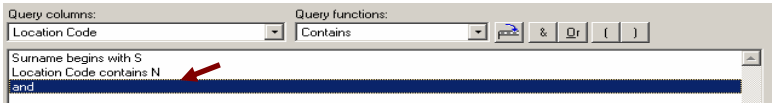
( ) = You would use the brackets if you are giving more than one option – For example

Year = 2007
OR
(Type = A **AND** Location = B)

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

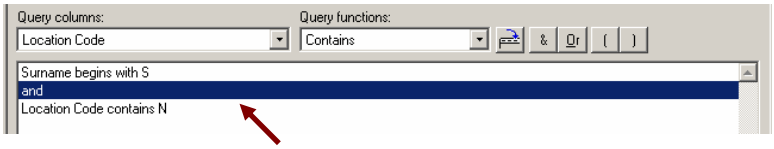
- Click onto the 'AND' (&) icon

This has now been entered into the query



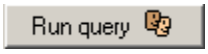
As you can see the 'AND' has appeared at the bottom of the list, you need it to be in between the two expressions. To do this

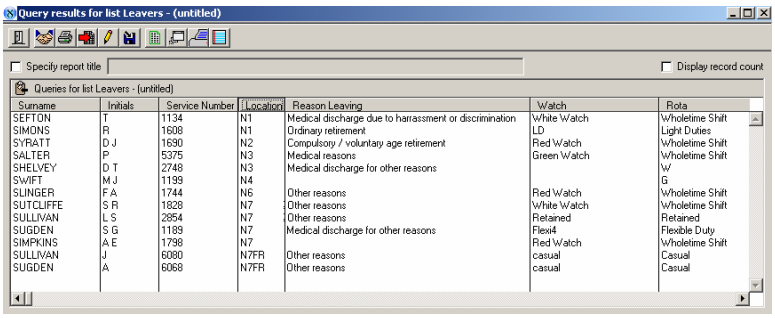
- Click onto the Arrow icon



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
- Click onto the Run Query icon 

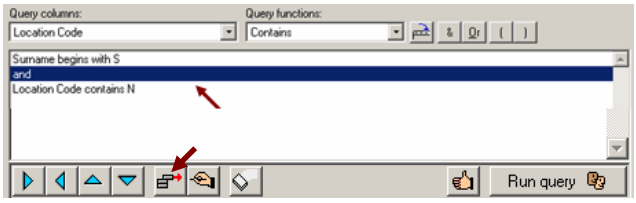


Surname	Initials	Service Number	Location	Reason Leaving	Watch	Rota
SEFTON	T	1134	N1	Medical discharge due to harrassment or discrimination	White Watch	Wholetime Shift
SIMONS	R	1608	N1	Ordinary retirement	LD	Light Duties
SYRATT	D J	1690	N2	Compulsory / voluntary age retirement	Red Watch	Wholetime Shift
SALTER	P	5375	N3	Medical reasons	Green Watch	Wholetime Shift
SHELVEY	D T	2748	N3	Medical discharge for other reasons		W
SWIFT	M J	1199	N4			G
SLINGER	F A	1744	N6	Other reasons	Red Watch	Wholetime Shift
SUTCLIFFE	S R	1828	N7	Other reasons	White Watch	Wholetime Shift
SULLIVAN	L S	2854	N7	Other reasons	Retained	Retained
SUGDEN	S G	1189	N7	Medical discharge for other reasons	Flexi4	Flexible Duty
SIMPKINS	A E	1798	N7		Red Watch	Wholetime Shift
SULLIVAN	J	6080	N7FR	Other reasons	casual	Casual
SUGDEN	A	6068	N7FR	Other reasons	casual	Casual

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'

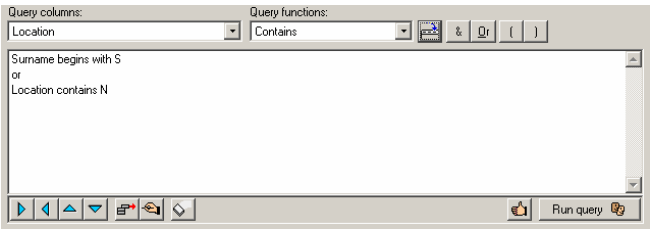
To remove the ‘AND’



- Click onto the ‘AND’ (highlighted)
- Click onto the ‘Remove Line’ icon

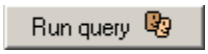
The ‘AND’ should now be removed

- Now Click onto the ‘OR’ icon

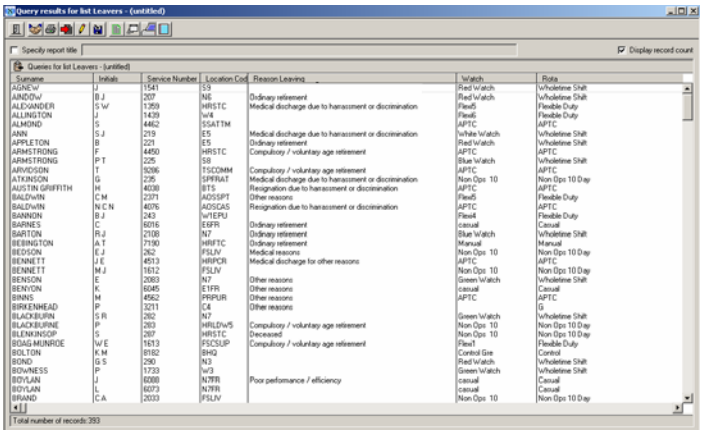


Use the arrows to put the ‘OR’ in between the expressions – as shown

To make sure the Query is set up correctly

- Click onto the Thumbs up icon
- Click onto the Run Query icon 

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



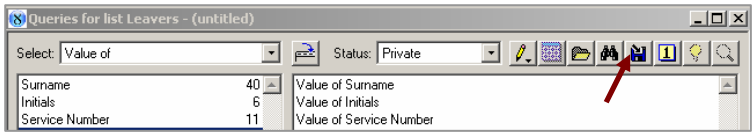
As you can see the Query has been broken down and 393 results – for all Surnames beginning with ‘S’ OR the Location containing ‘N’

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

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.

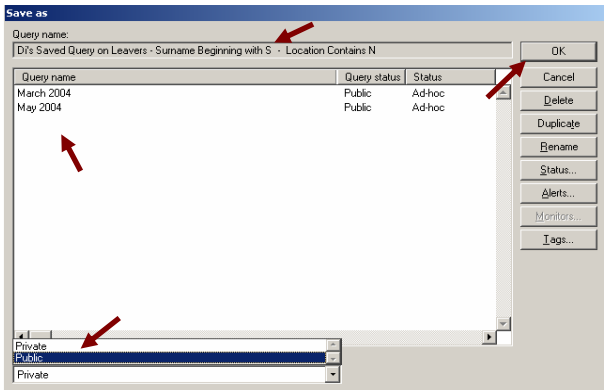
Within the Queries window



- Click onto the Save As icon

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.

Queries can be saved as Public or Private.

- Everybody with access to the current Library will have access to Public Queries.
- If a Query is saved as Private, then only the current user can see this.
- Click onto the arrow

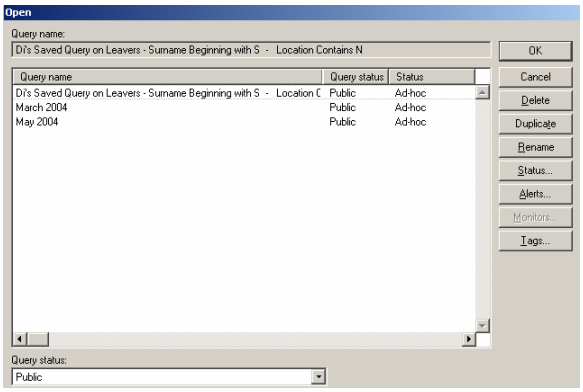
- Specify the status before saving the Query.

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

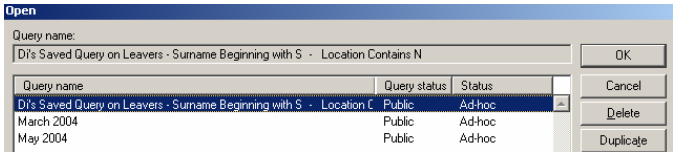


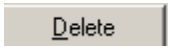
To change the status of a Query at a later date,

- Bring up the Open dialog,

Delete, Duplicate, Rename a Saved Query

- Go to the Open or Save dialog
- Highlight the Saved Query



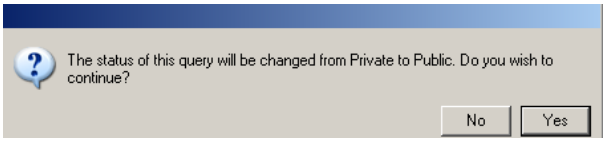
- Click onto the Delete button 

- Duplicate button will prompt for a name for the new Saved Query

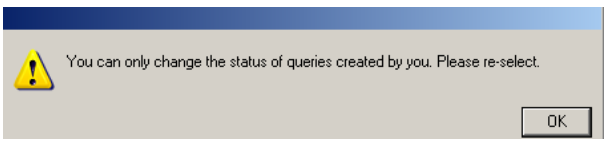
- Rename button allows a Saved Query to be renamed without the need to Open and Save As.

The Status button allows you to change the Query from Private to Public.

- Click onto the Yes button



You may get a dialog box up saying that you did not create the Query so you can not change its Status



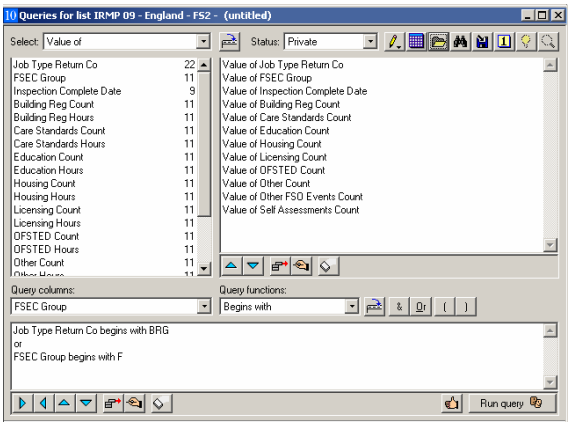
- Click on to the OK button

Automatic Queries

Setting-Up Automatic Queries

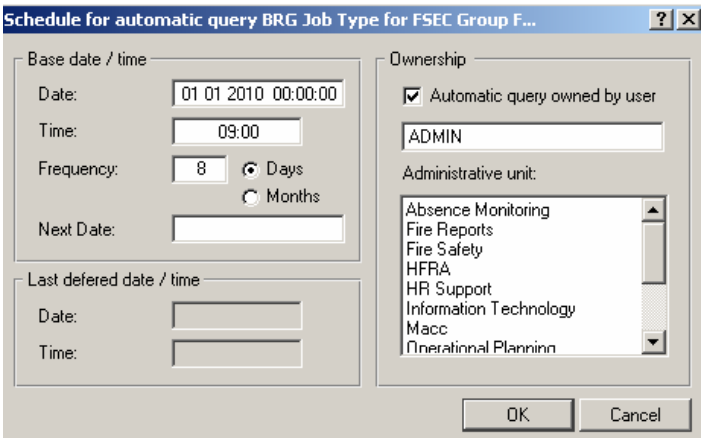
Scheduling queries allows a user to set up queries to be run at regular intervals. When a person logs in to pharOS they will be prompted with any outstanding 'Automatic Queries'. Once an 'Automatic Query' has been run the results are then stored in the database and can be compared to other results of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



- 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'

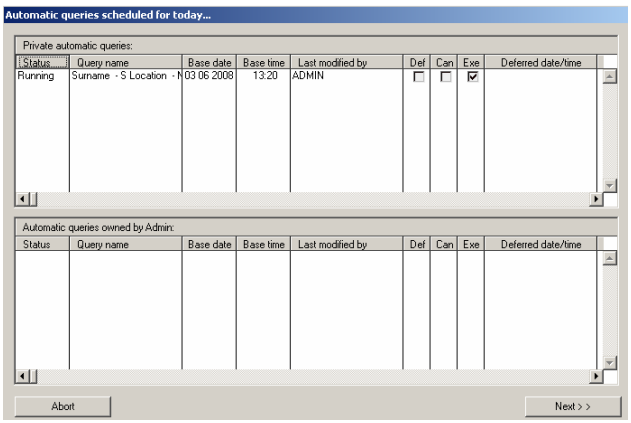
For example: If you wish the query to run starting from the beginning of the year, with a frequency of every 8 days at 09.00, the 'Base Date' would be set at 08 12 2009, the frequency 8 with corresponding 'Days' radio button selected to 'Days' and time specified as 09.00

For the query to take affect

- Log out
- Login

- Choose the 'Office/Department' the Query was saved under

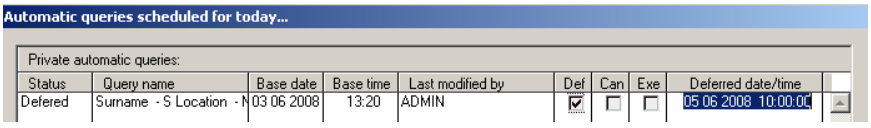
The 'Automatic Queries Scheduled for Today' window will appear



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

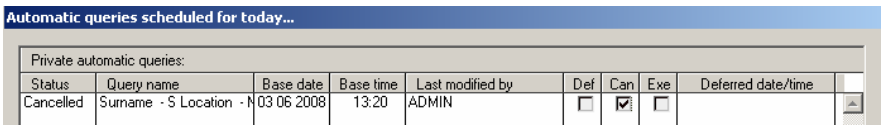
Deferred

This option will Defer the Query to a different date



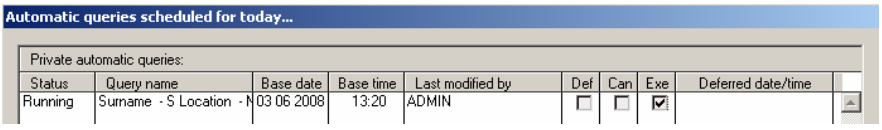
Cancelled

This option will Cancel the Query



Running

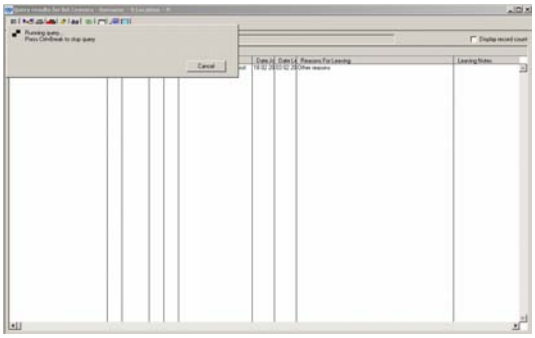
This option will Run the Query



To run the Query

- Click onto the Next button

A dialog box will appear saying Executing Query



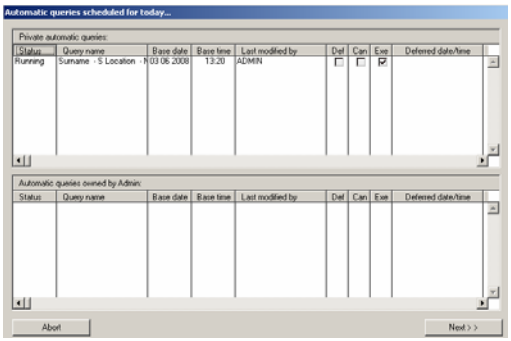
Very quickly the Query will flash onto the screen then disappear

To Retrieving Results of Automatic Queries go to page

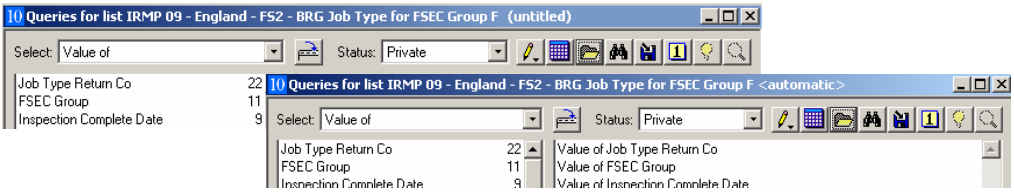
If you don't want the Query to Run

- Click onto the 'Abort' button

The 'Automatic Queries Scheduled for Today' window will close

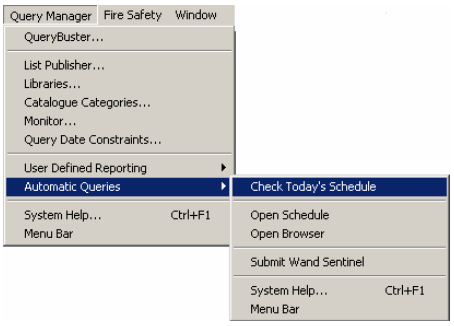


Notice the heading has changed on your saved (automatic) query from <untitled> to <automatic> This allows the user to know if the query has been setup as a to be automatically run



Retrieving Automatic Queries

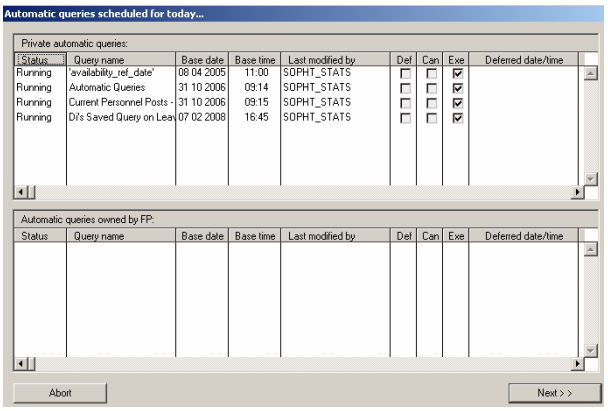
To check the Queries that was Automatically Scheduled for Today



- 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:



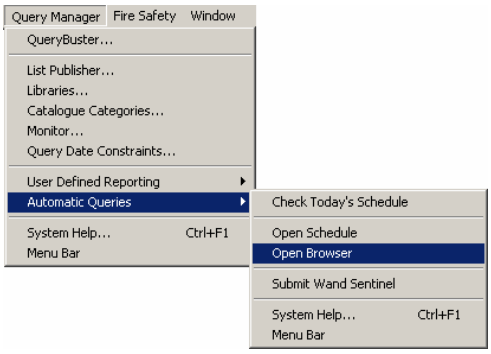
As you can see the query we have just created is now in the 'Scheduled for Today' list

- Click 'Next' to run any query listed

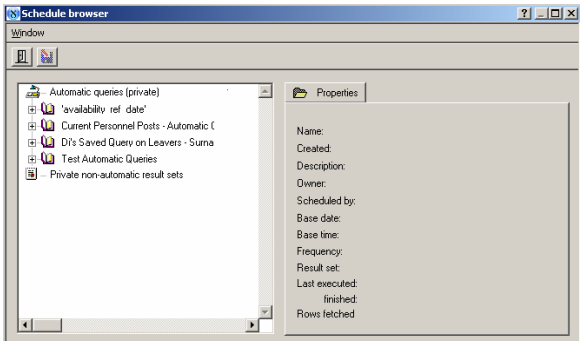
Other wise close this window and go to 'Retrieving Results of Automatic Queries'

Retrieving Results of Automatic Queries

To see the results of the query that has just Ran



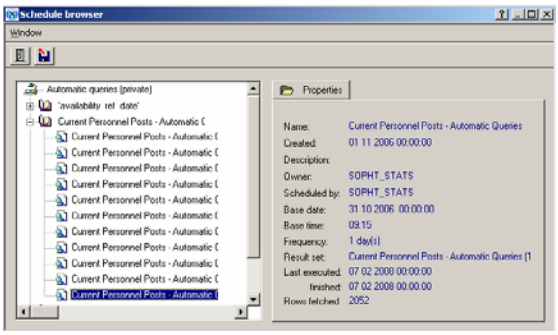
- Click onto 'Query Manager'
- Scroll down to 'Automatic Queries'
- Click onto 'Open Browser'

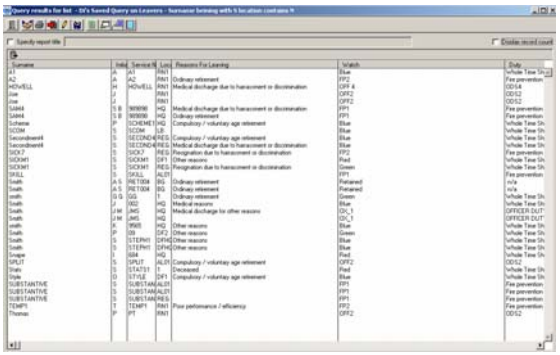


This window can also be accessed from within the published query view by clicking on the Binoculars icon.

- 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.





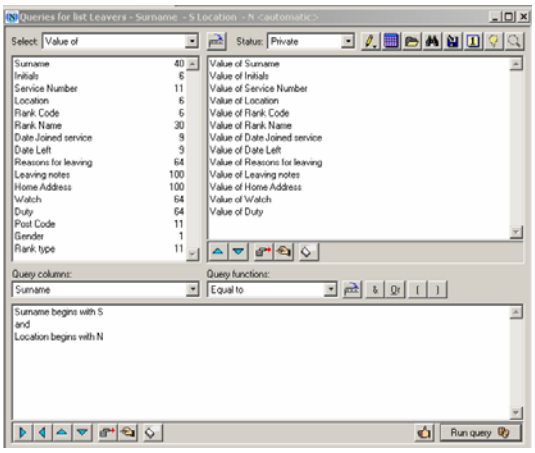
Results will now print to screen and can be printed to printer, saved or exported to excel.

Reference Date Functionality

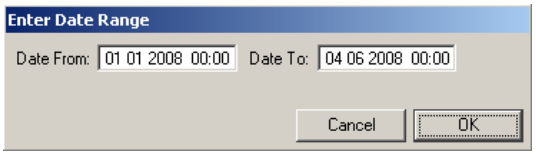
A number of queries use this functionality to allow a 'Date Range' to be entered – then only records between the set dates will be returned.

Within the query window

- Click onto the '1' icon



The 'Reference Date' window will appear:



- Enter the 'Date Range'

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.