Reporting Tools

Reporting Tools option allows users to run, create/build, and manage queries. The Reporting Tools also allows the query result to be sent to an Excel spreadsheet and to export to a file.

This section contains the following topics:

[Query](#)

[Report Manager](#)

Query

The Query is a graphical tool that allows easy retrieval of specific data by specifying the records, fields (e.g. Name, City State), and criteria (e.g. Zip Code = 32605) to be applied to the search. Query results can then be viewed via several methods.

This section contains the following topics:

[Query Manager](#)

[Query Viewer](#)

[Schedule Query](#)

Query Manager

This option allows the user to add, view, run, and modify an existing query. There are multiple tabs in Query Manager.

- Records - This tab allows listing of records chosen to use to run a query.
- Query - This tab allows the fields to be selected to use to create the query.
- Expressions - This tab allows for the adding of expressions to the query.
- Prompts - This tab allows the query to be designed to prompt for information whey the query is run. The results can be narrowed to only data matching information rather than data from all records.
- Fields - This tab allows the creation of the query.
- Criteria - This tab will identify specific sorting requirements.
- Having - This tab will allow the editing of properties for the query
- View SQL − This tab allows the viewing of the structure query language that ***EmpowHR*** automatically writes for the fields that are selected.
- Run - This tab allows for the running of query reports.

This section contains the following topics:

[Find An Existing Query](#)

[Creating A New Query](#)

Find An Existing Query

To Find An Existing Query:

1. Select ***Reporting Tools*** from the ***EmpowHR*** menu.
2. Select ***Query*** from the Reporting Tools drop-down menu.
3. Select ***Query Manager*** from the Query drop-down menu. The ***Query Manager*** window (**Figure 647**) is displayed.

Figure 647. Find An Existing Query window

4. Complete the fields as follows:

Search By

Select the value for the search criteria or select data from the drop-down list. The valid values are:

Search By Valid Values
Access Group Name
Description
Folder Name
Owner
Query Name
Type
Uses Field Name
Uses Record Name

Begins With

This field value corresponds to the Search By value.

5. Click **Search**. The Query Manager window (**Figure 648**) is displayed. Query Manager is a list of queries displayed based on the search criteria entered.

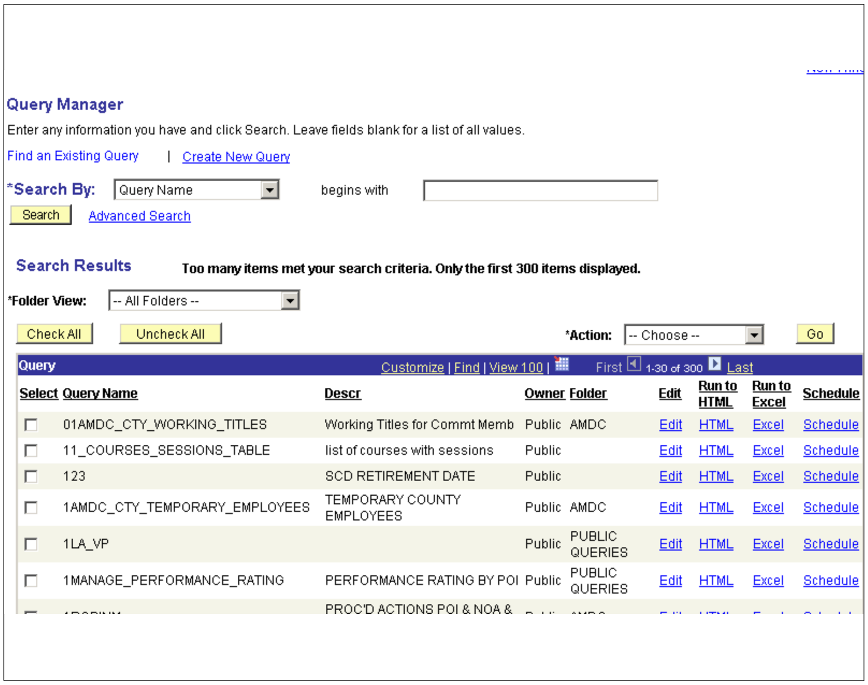

Figure 648. Query window

6. Click on the applicable link for the query. At this time, the Delete, Rename, Run and Schedule options are available. Click the applicable link in the query row without having to open them.

7. Click the ***Edit*** link. The Fields window (**Figure 649**) is displayed.

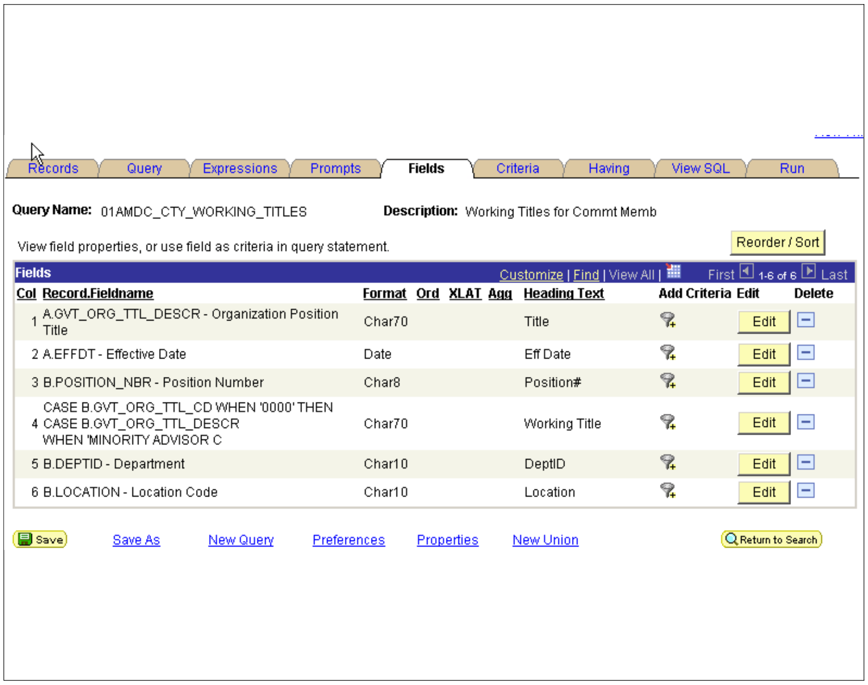

Figure 649. Fields window

8. Click **Save** to save the information.

   OR

   Click the ***Edit*** link. The Edit Field Properties window (**Figure 650**) is displayed.

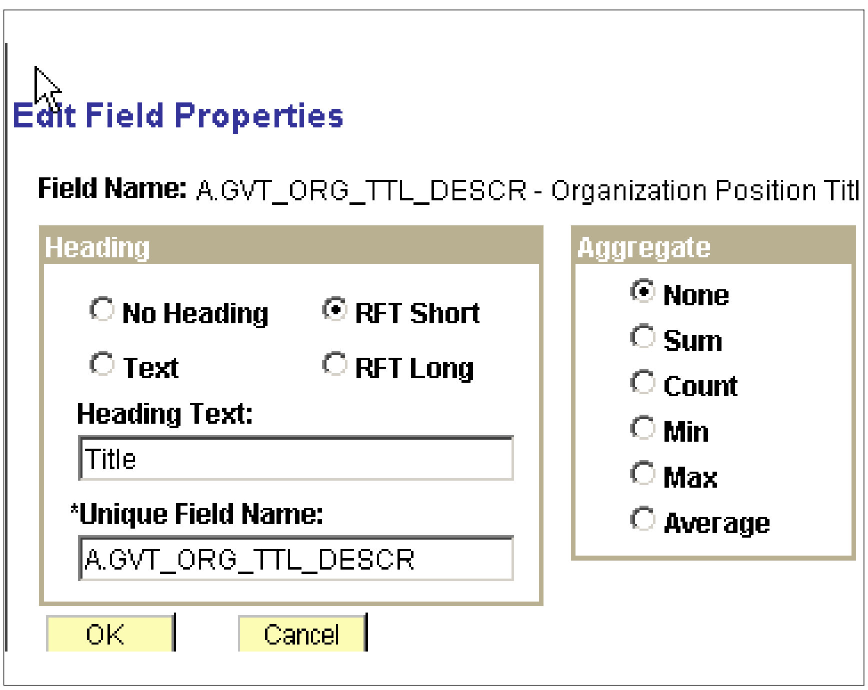

Figure 650. Edit Field Properties window

9. Complete the fields as follows:

Heading/No Heading

Check this box if the field is not a heading.

Heading/RFT Short

Check this box if the field is not a RFT Short.

Heading/Text

Check this box if the field is not text.

Heading/RFT Long

Check this box if the field is not a RFT Long.

Heading Text

This field defaults to **`title`**. Change if applicable.

***Unique Field Name**

This field defaults to the field name that was selected.

Aggregate/None

This field is checked and defaults to **`None`**.

Aggregate/Sum

Check this box if applicable.

Aggregate/Count

Check this box if applicable.

Aggregate/Min

Check this box if applicable.

Aggregate/Max

Check this box if applicable.

Aggregate/Average

Check this box if applicable.

10. Click **OK**. The Fields window (**Figure 649**) is displayed
OR

Click **Cancel**. The Fields window (**Figure 649**) is displayed.

OR

Click **New Query**. The Find An Existing Query window (**Figure 647**) is displayed.

OR

On the Fields window (**Figure 649**) click **Return To Search**. The Find an Existing Query window (**Figure 647**) is displayed.

Note: It is important not to make changes to any query that you did not create. If you want to make changes to a query, rename and save the query before making the changes.

Report Manager

This is a view only function and displays a the list of any reports that have been created in ***EmpowHR.***

1. Select ***Reporting Tools*** from the ***EmpowHR*** menu.

2. Select ***Report Manager*** from the Reporting Tools drop-down menu. The List window (**Figure 651**) is displayed. There are multiple tabs in the option ***List***, ***Explorer***, ***Administration***, and ***Archives***. The drop-down lists on these windows are used as filters. These filters narrow the search for a report. To run a report refer to Report Functions in this manual.

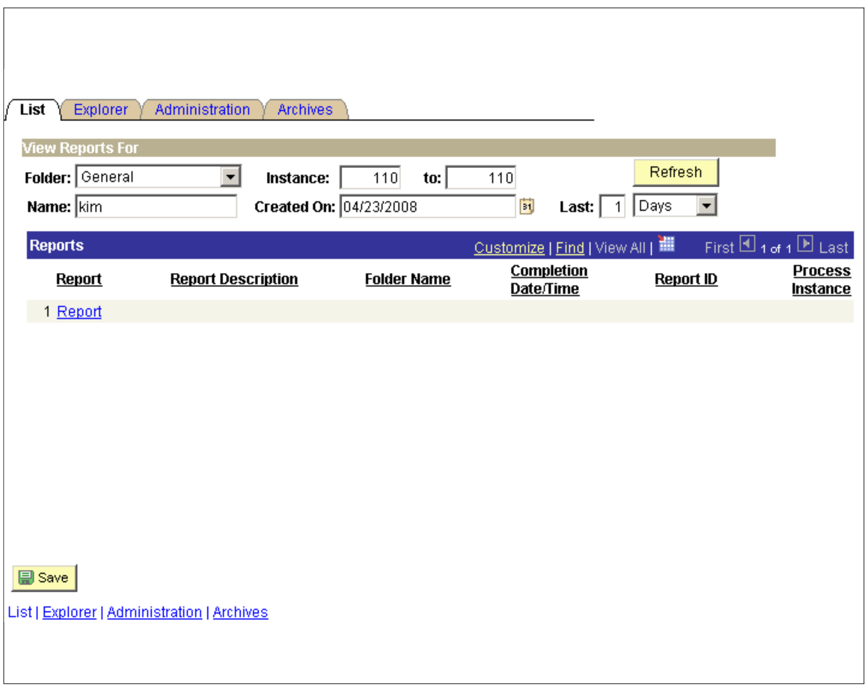

Figure 651. List window

Creating A New Query

Below is a list to help to understand the difference between a Public and Private Queries.

- Anyone can use a public query.
- Only the person who created a private query can use it.
- It is important not to make changes to any query that you did not create. If you want to make changes to a query, rename and save the query before making changes.
- Always save the private version that is created from a public query with a unique name. It is recommended to use initials as the first three letters of the query name.
- If a public query is created, consider creating a private copy with a unique name for yourself. Therefore, if someone mistakenly changes a public query that you created, a copy of the original will be available .
- When searching for a query from ***Query Manager Search EmpowHR*** will automatically list all private queries. Only the person that created the query will see these items. The public queries will be listed after the private queries.
- If a public query is run and do not receive the results, the user may not have the authorization to some of the data used in that query.

Selecting Records

1. Select ***Reporting Tools*** from the ***EmpowHR*** menu.
2. Select ***Query*** from the Reporting Tools drop-down menu.
3. Select ***Query Manager*** from the Query drop-down menu. The ***Query Manager*** window (**Figure 652**) is displayed.

Figure 652. Find An Existing Query window

4. Click the ***Create New Query*** link. The Records window (**Figure 653**) is displayed.

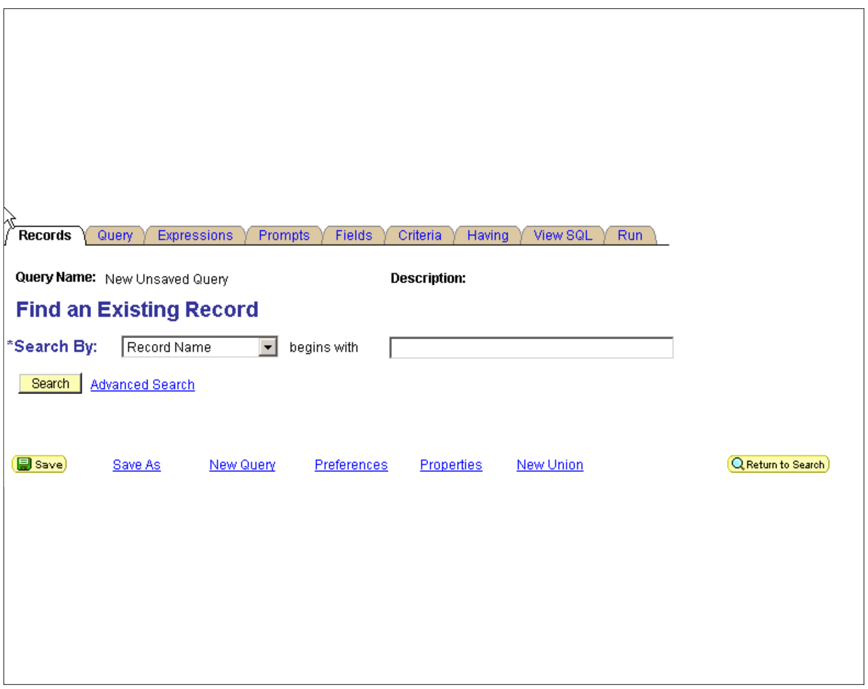

Figure 653. Records window

Note: The **`Query Name`** on the window displays as **`New Unsaved Query`**.

5. Complete the fields as follows:

Search By

Select the value for the search criteria or select data from the drop-down list. The valid values are **`Access Group Name`**, **`Contains Field Name`**, **`Description`**, and **`Record Name`**.

Begins With

Enter information that corresponds to the valid values above.

6. Click **Search**. The Search Results list window (**Figure 654**) is displayed based on the search criteria entered.

Figure 654. Records window from Search Results

7. Click the ***Add Record*** link to add the record to the query. For many records, a pop-up (**Figure 655**)will appear. Many tables in ***EmpowHR*** have an effective date criteria added. It is recommended to leave the criteria in the query, since most of the time the user will want to see the most recent data row. However, the criteria can be removed later to expand the query results.

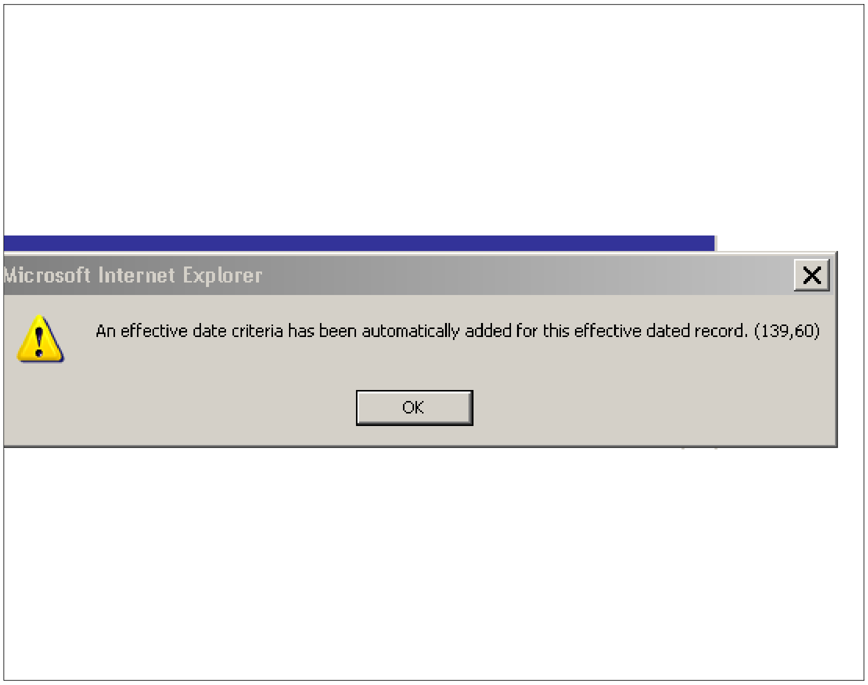

Figure 655. Effective Date pop-up

8. Click **OK**. The Query window (**Figure 656**)will display with a list of the field for the Add Record result.

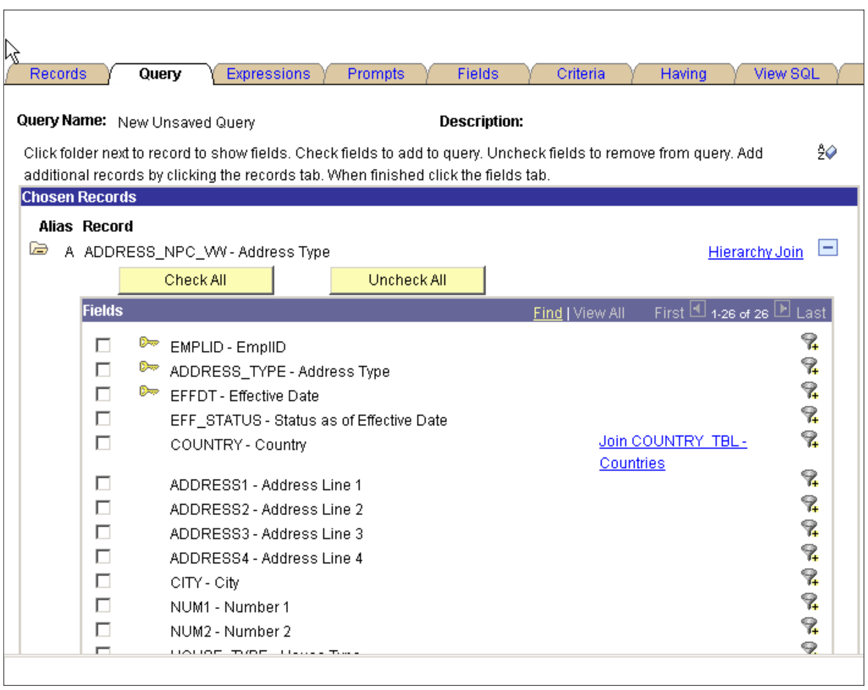

Figure 656. Query window

9. Check the boxes next to the fields that should be displayed on the query output. If the **Check All** is selected then the fields will populate to the ***Fields*** window (**Figure 649**).

OR

Click ***Select Fields*** On the Search Results window (**Figure 654**). The Description window (**Figure 657**)of the selected field is displayed.

Figure 657. Description window (for the selected field)

10. Click **Return**. The Search Results window (**Figure 654**)is displayed.

Joining Records

To automatically join records:

On the Query window (**Figure 656**)there are some fields that have link ***Join*** with the field name. ***EmpowHR*** automatically displays tables that contain information pertinent to a particular field.

1. Click the ***Join*** link. ***EmpowHR*** will add the link.

2. Click the box next to the field name. This will add the field description to the query results.

To manually join records:

1. Click the Records tab. The Records window (**Figure 658**) is displayed. This window displays different information depending when the tab is selected. If the tab is selected after the initial search, the window (**Figure 654**) is displayed. If the tab is selected after the Query tab is selected, then (**Figure 658**) is displayed.

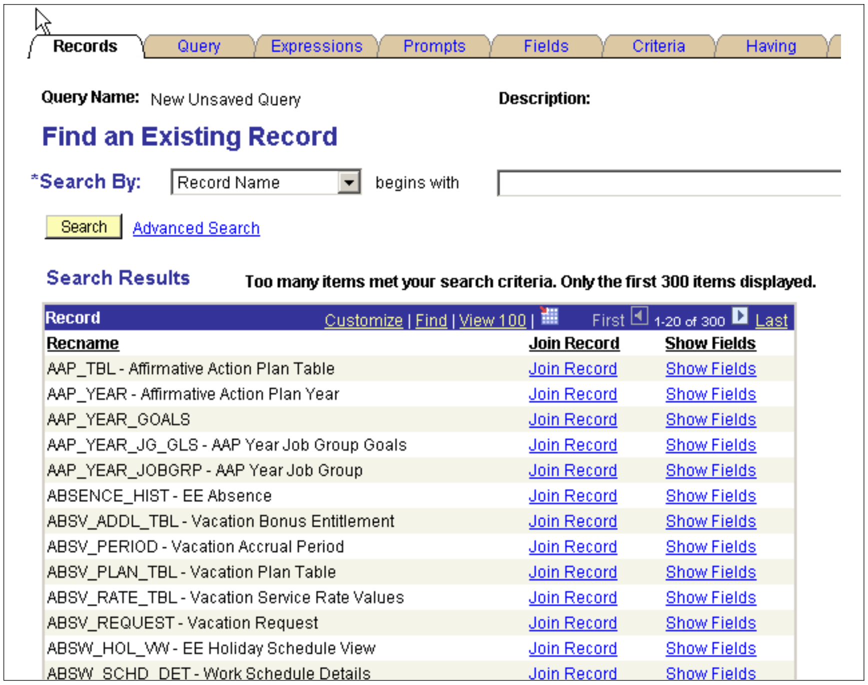

Figure 658. Records window

2. Click the ***Join Record*** link. This will join the record in the query.

When joining more than two records, ***EmpowHR*** will ask to which table you would like to join. Always join with the record containing the main information. Once the table is selected to join, ***EmpowHR*** provides the option to automatic join criteria. Always select the criteria provided. These automatic criteria elements are based upon key fields in each table that is needed to appropriately join the tables. If one of these criteria joins **`Off`**, the query will not run properly.

Saving A Query

Once the records and fields are chosen, the query can be saved. It is recommended to save the queries early and often. Below are some tips for saving queries.

- Queries can be saved from any tab except the ***Records*** and ***Preview*** tabs.
- The query name must be all CAPS.
- Names can be up to 30 characters in length.
- No spaces or special characters are allowed except an underscore.
- It is suggested that initials are used before the query name.
- the Description can also be up to 30 characters in length.
- The **`Query Type`** will almost always be **`User`**.
- Choose **`Public`** or **`Private`** ownership depending on whether other should access the query.
- The **`Query Definition`** field allows for more detailed description or special notes.

1. Click **Save** on the bottom left of the window. The Enter A Name To Save This Query window (**Figure 659**) is displayed.

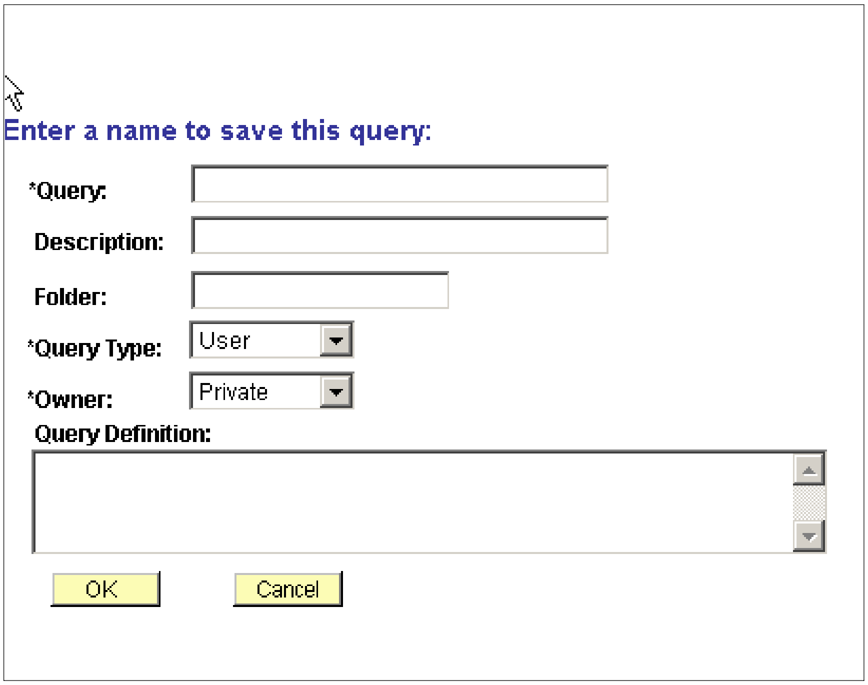

Figure 659. Enter A Name To Save This Query window

2. Complete the fields as follows:

***Query**

Enter the query name.

Decription

Enter description of the query.

Folder

Enter the of the folder where in query will be saved.

***Query Type**

This field defaults to **`User`** and can be changed by selecting data from the drop-down list. The valid values are **`Archive`**, **`Process`**, **`Role`**, and **`User`**.

***Owner**

This field defaults to **`Private`**. The valid values are **`Private`** and **`Public`**.

Query Definition

Enter the definition of the query.

3. Click **OK**.

Working With Fields

At this point the records and fields have been selected and saved.

1. Click the ***Fields*** tab. The Fields window (**Figure 660**) is displayed.

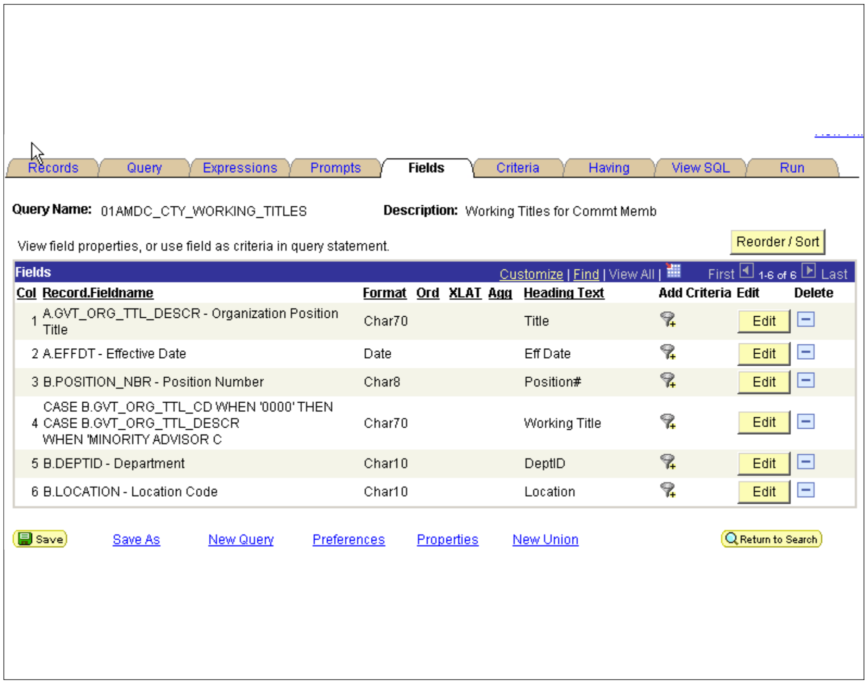

Figure 660. Fields window

EmpowHR identifies each field with a letter preceding the field name. The letter corresponds to the record the field is chosen from. The records are labeled in sequential order according to when the record is chosen. For Example: If the Job records is chosen first, they will be preceded by the letter **A**. The DEPT_TBL is chosen second, so the DESCR field is preceded y a **B**.

2. Click **Reorder/Sort** in the upper right corner of the ***Fields*** window (**Figure 660**) to resort the fields in a different order in the query output. The ***Edit Field Ordering*** window (**Figure 661**) is displayed.

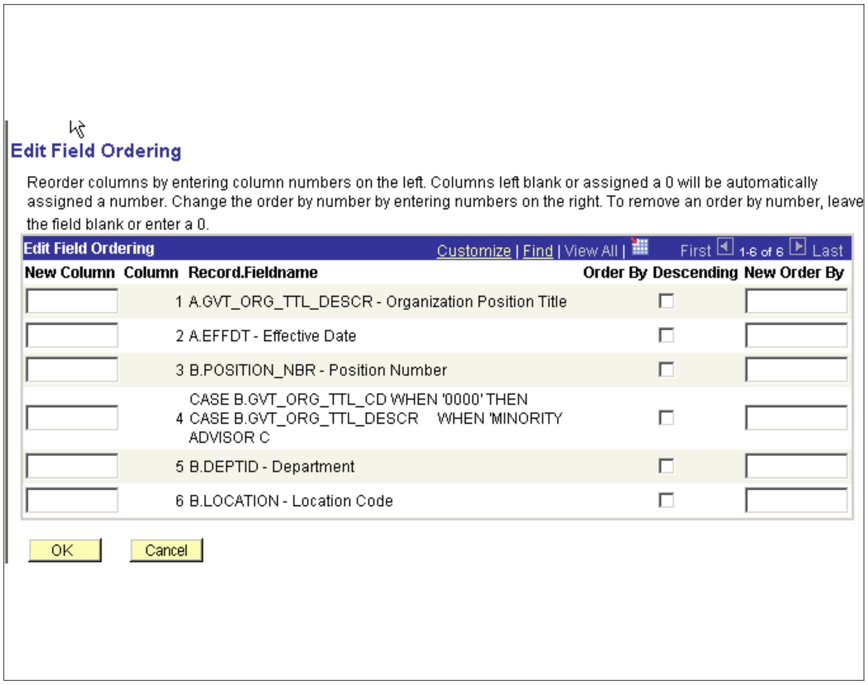

Figure 661. Edit field Ordering window

Reorder columns by entering column numbers on the left. Columns left blank or assigned a `0` will be automatically assigned a number. Change the order by entering numbers on the right. To remove an order by number, leave the field blank or enter a `0`.

3. Complete the fields as follows:

New Column

Enter the sequential numbers in the fields to change the order in whey the fields appear left to right in the query output.

New Order By

Enter the sequential numbers in the fields to change how the data is sorted.

4. Click **Ok** to see the new order of the fields.

Previewing A Query

This option allows the user view the information previously chosen.

1. Click the ***Run*** tab. The Run window (**Figure 662**) is displayed with the information.

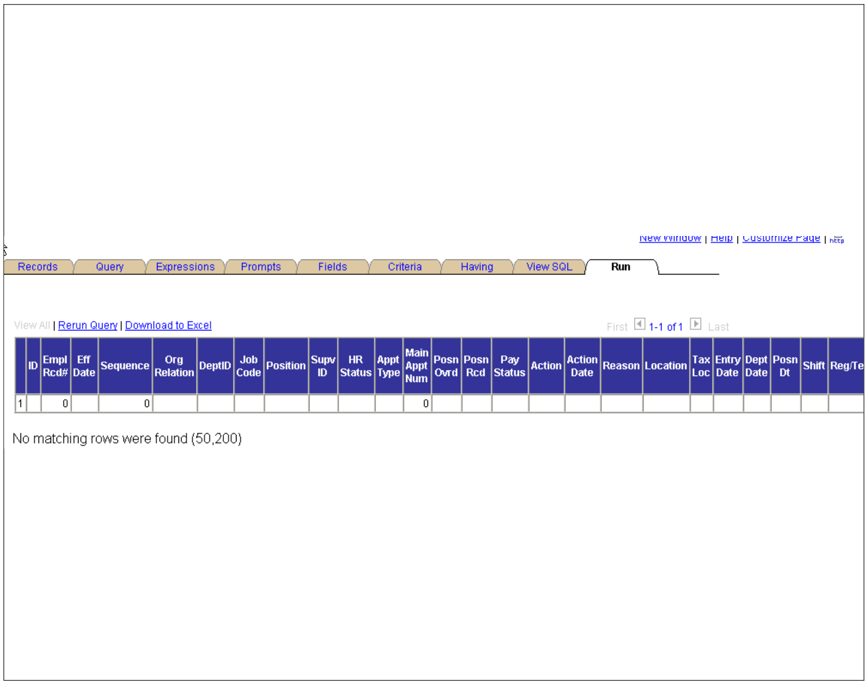

Figure 662. Run window

Adding Criteria

This option allows the user to narrow down the amount of records in the query output and to choose specific types of data needed to add criteria to the query.

1. Click the ***Criteria*** tab. The Criteria window (**Figure 663**) is displayed.

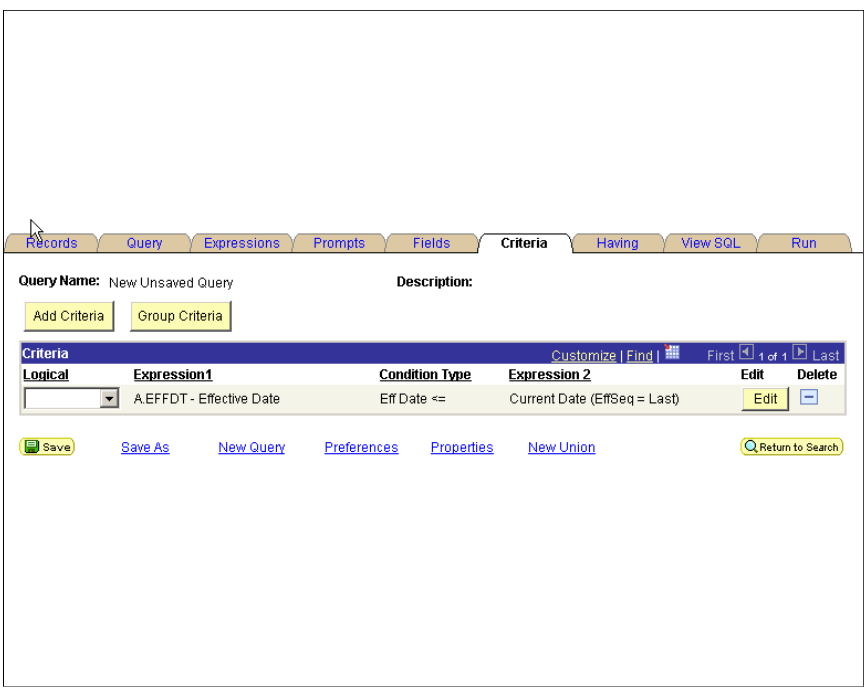

Figure 663. Criteria window

The Criteria window (**Figure 663**)has several criteria elements. ***EmpowHR*** added these elements automatically to the query when the records were joined. These criteria include EFFDT − Effective Date to return the most recent row of data, and automatic table joins for key fields. It is best to leave these criteria elements as they are. The only one that may be changed is the Effective Data, which would allow the expansion of query results.

There are several ways to add criteria to the query. To add criteria to the fields that have been selected, use the Fields window (**Figure 649**).

2. Click the  to the right of the field to add the criteria for the report. The Edit Criteria Properties window (**Figure 664**) is displayed.

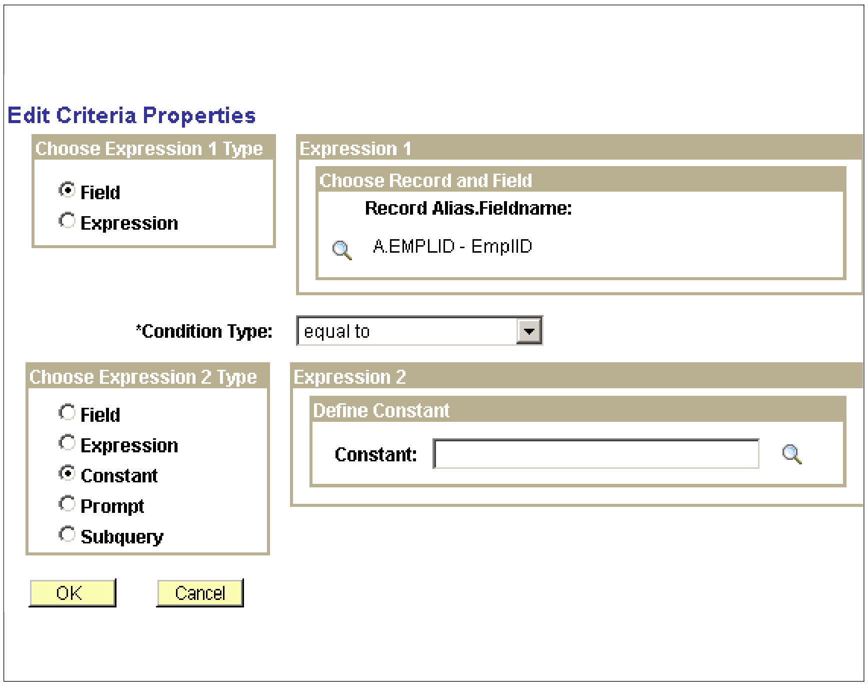

Figure 664. Edit Criteria Properties window

3. Complete the fields as follows:

Choose Expression 1 Type/Field

This field is checked. Uncheck this box if applicable.

Choose Expression 1 Type/Expression

Check this box if applicable

Expression 1 /Choose Record And Field

This field displays the field name selected from the Fields window (**Figure 660**).

Choose Expression 2 Type/Field

This field displays the value that corresponds to the Expression 1 Type.

***Condition Type**

This field defaults to `Equal To`. Change if applicable or select data from the drop-down list. The following table describes the available Condition Types for criteria. For each Condition type, Query manager offers a not option that reverses its effect. For example, `Not Equal To` returns all rows that `Equal To` would not return. The valid values are listed below:

Condition Type Valid Values	When It Returns A Row
Equal To	The value in the selected record field exactly matches the comparison value.
Between	The value in the selected record field falls between two caparison values. The range is inclusive.
Exists	This operator is different from the others, in that it doesn't compare a record field to the comparison value. the comparison value is a subquery. If the subquery returns any data. ***EmpowHR*** returns the corresponding rows.
Greater Than	The value in the record field is greater than the comparison value.
In List	The value in the selected record field matches one of the comparison values in the list.
In Tree	The value in the selected record field appears as a node in a tree created with ***EmpowHR*** Tree Manager. The comparison value for this operator is a tree or branch of a tree for ***EmpowHR*** Query to search.
Is Not Null	
Is Null	The selected record field does not have a value in it. Do not specify a comparison value for this operator. Key fields, required fields, character fields, and numeric fields do not allow null values.
Less Than	The value in the record field is less than the comparison value.
Like	The value in the selected field matches a specified string pattern. the comparison value may be a string hat contains wildcard characters. The wildcard characters that ***EmpowHR*** Query recognizes are `%` and `_`. `%` matches any string of zero or more characters. For example, `C%` matches any string starting with `C`, including `C` alone. _matches any single character. For example, _ ones matches any five-character string ending with `ones`, such as Jones or Cones. ***EmpowHR*** Query also recognizes any wildcard characters that any database software supports. To use one of the wildcard characters as a literal character(e.g., to include a `%` in the string), precede the character with a `\`. For example, percent `\%\`.

Other Condition Type Valid Values
Not Between
Not Equal To
Not Greater Than
Not In List
Not In Tree
Does Not Exist
Not Less Than
Not Like

Choose Expression 2 Type/Expression

Check this box if applicable.

Choose Expression 2 Type/Constant

This box defaults to checked. Uncheck if applicable.

Choose Expression 2 Type/Prompt

Check this box if applicable.

Choose Expression 2 Type/Subquery

Check this box if applicable.

Expression 2/Define

This field displays the information that corresponds to the Expression Type box that is checked. Enter the applicable information.

Based on the options selected in each field, a new window could appear. Enter applicable information on each window.

4. Click **OK**. The Fields window (**Figure 649**) is displayed.

Other Ways To Add Criteria-Query Tab

1. Click the ***Query*** tab. The Query window (**Figure 648**) is displayed.
2. Click the **+** next to the specific table.
3. Check the box next to the field to add criteria to that field.

4. Click the  to the right of the field to add the criteria for the report. The Edit Criteria Properties window (**Figure 664**) is displayed.

Other Ways To Add Criteria-Criteria Tab

1. Click the ***Criteria*** tab. The Criteria window (**Figure 663**) is displayed.

2. Click the search icon in the Expression 1 Choose Record and field group box. The Select A Field window (**Figure 665**) is displayed.

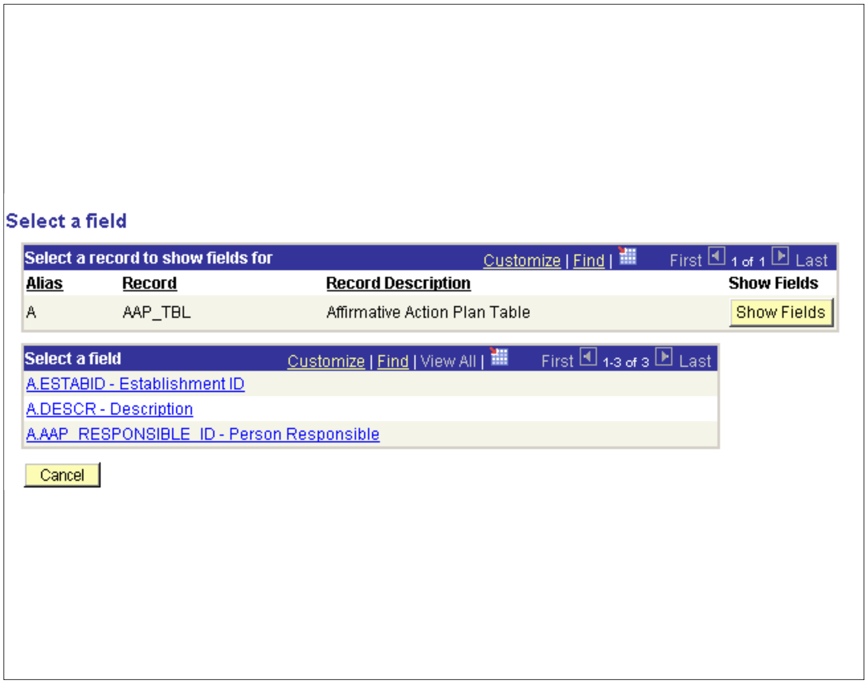

Figure 665. Select A Field window

3. Click **Show Fields** to view the record.

4. Click any link. The Edit Criteria Properties window (**Figure 664**) is displayed.

Removing Criteria

1. Click the ***Criteria*** tab. The Criteria window (**Figure 663**) is displayed.

2. Click the **–**beside the applicable criteria statement to delete.

3. Return to the Fields window (**Figure 649**)for more criteria options.

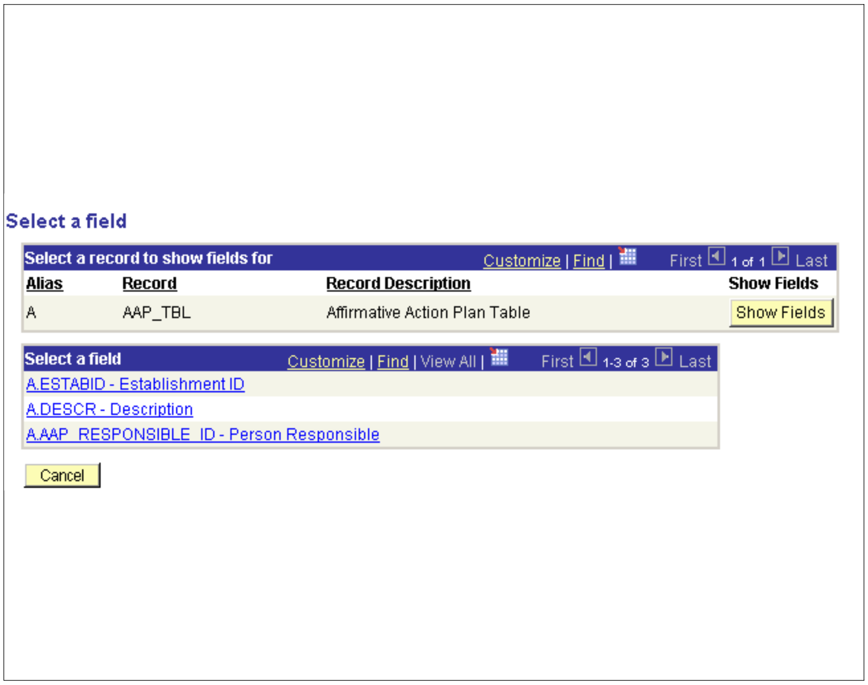

Figure 666. Select A Field window

4. Click **Show Fields** to view the record.

5. Click any link. The Edit Criteria Properties window (**Figure 664**) is displayed.

Using Wildcards

Wildcards are used when the exact value is not known or when the values are too many to search on . The `%` and the _ are the two wildcard symbols.

Working With Prompts

Queries can be designed to prompt for information when they are run. Therefore, the results of the query are narrowed to only the data matching the information entered, rather than data from all records.

To add a Prompt:

1. Click the ***Criteria*** tab. The Criteria window (**Figure 663**) is displayed.

2. Click **Add Criteria**. The Edit Criteria Properties window (**Figure 664**) is displayed.

3. Click the search icon in the **`Expression 1 Choose Record And Field`**. The Select A field window (**Figure 666**) is displayed.

4. Click **Show Fields**. A list of available fields are displayed.

5. Select a field name.

6. Click the drop-down list next to the **`Condition Type`**.

7. Select **Like**.

8. In the **Choose Expression 2 Type** click the box next to **Prompt**. A new prompt field appears. Verify that the value **Prompt Table** is in the ***Edit Type** field. This allows the look-up of prompt selections.

9. Change the ***Heading Type**.

10. Change the ***Heading Text**. The Heading Text is the message that will be displayed when prompted.

11. Click **OK** The Edit Criteria Properties window (**Figure 664**) is displayed.

12. Click **OK**. the Criteria window (**Figure 663**) is displayed.

Working With Translate Values

When selecting fields, sometimes it is necessary to join to another record to retrieve the description for that field. For some fields, ***EmpowHR*** includes an **XLAT** value that allows the viewing of the descriptive version of the field without going to a separate table.

1. Click the ***Fields*** tab. Notice the column headings above the fields. If the field as a translate value, an **N** will appear under the **XLAT** column heading.

2. Select **Edit** beside a field name. The Edit Field Properties window (**Figure 667**) is displayed.

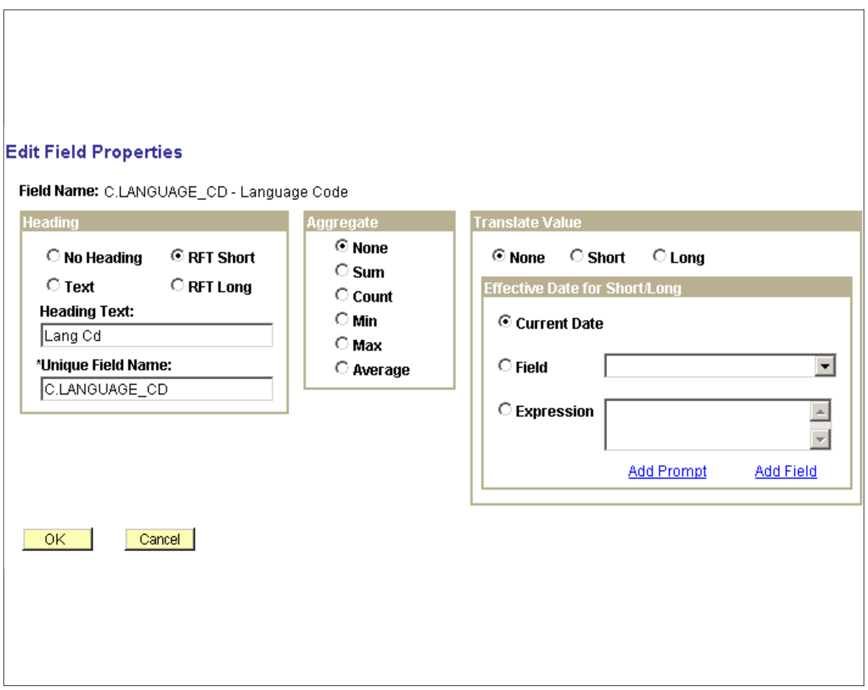

Figure 667. Edit Field Properties window

3. In the **Translate Value** this field gives the option for a **Short** or **Long** description.

4. Click **OK**. The Field window (**Figure 649**) is displayed. Notice that an **L** now appears in the **XLAT** column heading.

Exporting Data

Query Manager allows the export of data to Excel or to a text document in CSV format. Export data from the ***Run*** tab.

1. Click the ***Query Manager*** from the menu and search for the query that has been created. the Query Viewer window (**Figure 668**) is displayed.

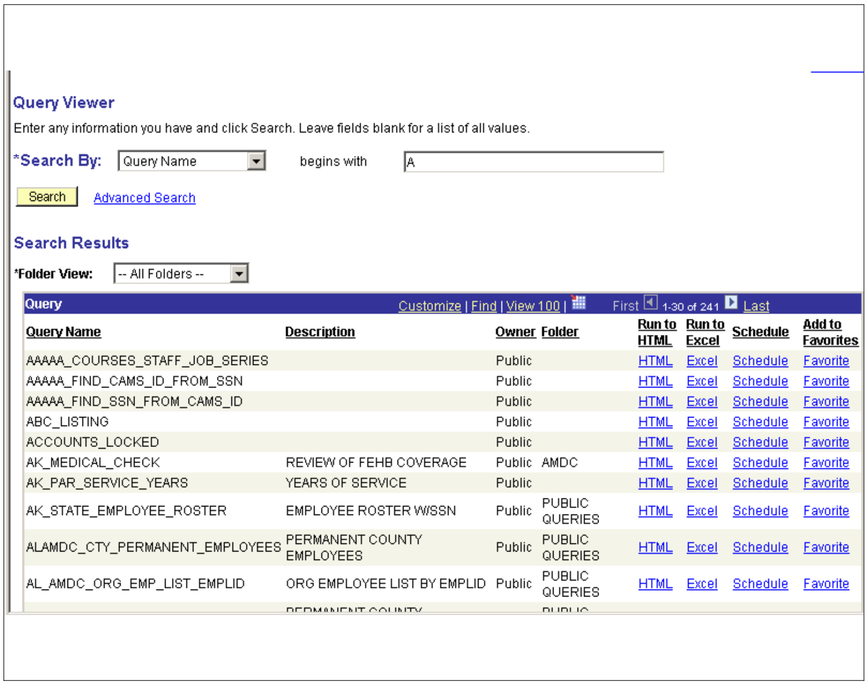

Figure 668. Query Manager window

2. Click the ***Run HTML*** or ***Run Excel*** link without opening the query. Save the query to a file. The ***Save*** pop-up appears.

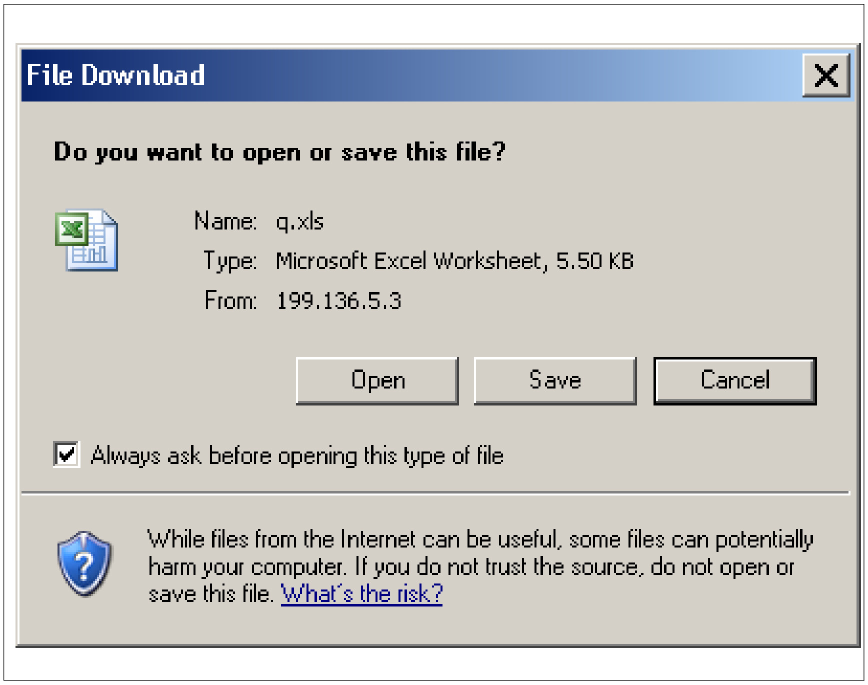

Figure 669. Save pop-up

3. Click **Open** to open the type of select made and view the query.

   OR

   Click **Save** to a file.

   OR

   Click **Cancel** to return to the window.

Query Viewer

This option allows the user to only view and run existing queries.

To view a Query:

1. Click the ***Query Manager*** from the menu to search for the query that has been created. The Query Viewer window (**Figure 670**) is displayed.

Figure 670. Query Viewer window

2. Complete the fields as follows:

Search By

Select a value to search for a Query or select data from the drop-down list. The valid values are as follows:

Search By Valid Values
Access Group Name
Description
Folder Name
Owner
Query Name
Type
Uses Field Name
Uses Record Name

Begins With

This field corresponds to the search value selected.

3. Click **Search**. The Query Manager window (**Figure 668**) is displayed. For more information on this window refer to Exporting Data in this procedure.

Schedule Query

This option allows the user to schedule a run time for standard queries.

To Schedule a Query:

1. Click the ***Schedule Query*** from the menu and search for the query that has been created. The Schedule Query window (**Figure 671**) is displayed to locate an existing report.

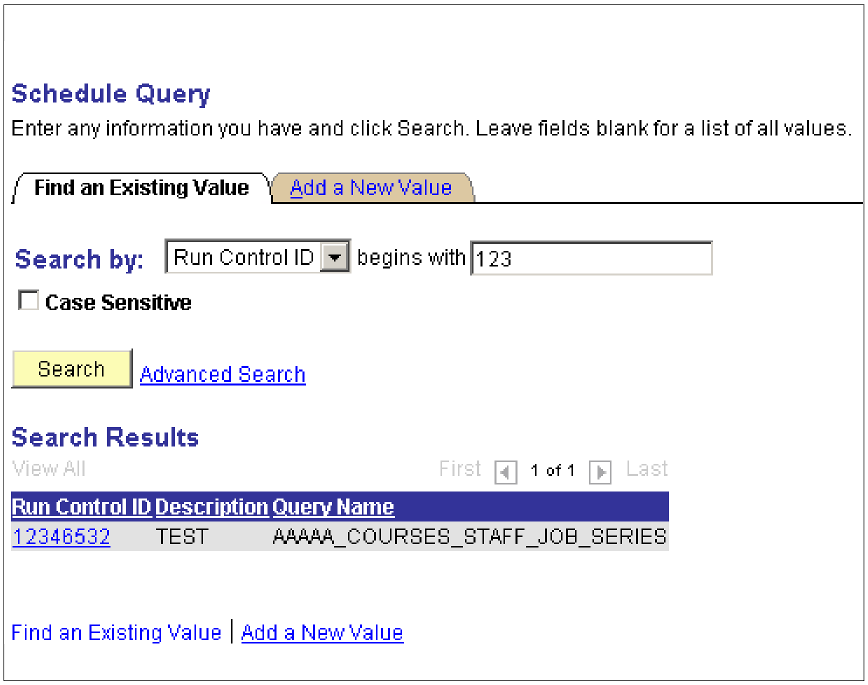

Figure 671. Query Viewer window

2. Complete the fields as follows:

Search By

Select a value to search for a Query or select data from the drop-down list. The valid values are **`Query Name`** and **`Run ID`**.

Begins With

This field corresponds to the search value selected.

3. Click **Search**. The Schedule Query window (**Figure 672**) is displayed.

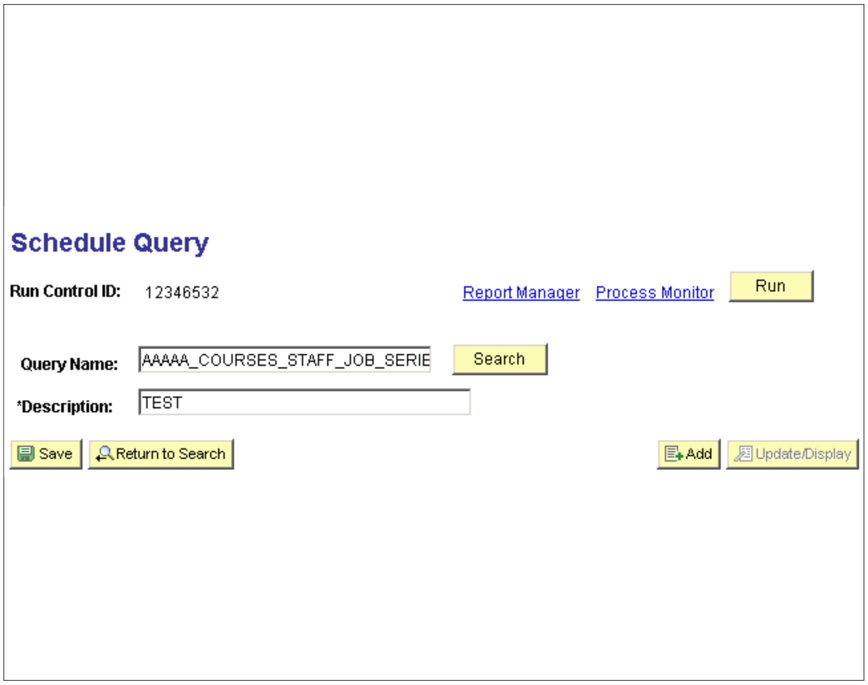

Figure 672. Schedule Query window

4. Complete the fields as follows.

Query Name

This field corresponds to the search name entered.

***Description**

This field is system-generated.

5. Click **Save**.

OR

Click **Return To Search** to search for another query.

OR

Click **Add** to add a query.

OR

Click **Report Manager**. For more information on this topic refer to Report Manager of this manual.

OR

Click **Process Monitor**. For more information on this topic refer to Process Monitor of this manual.

OR

Click **Run**. For more information on this topic refer to Run of this manual.