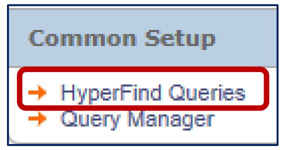
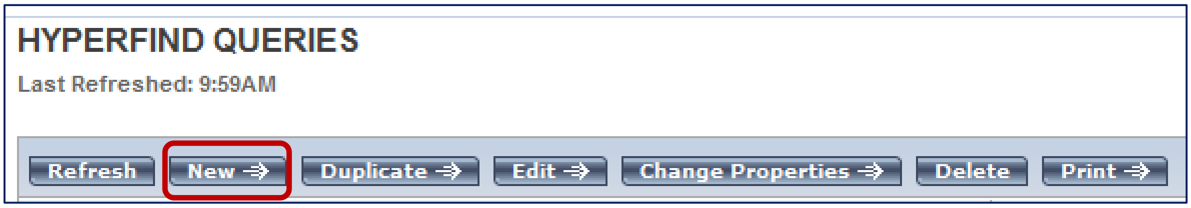
Creating a Personal HyperFind Query

eSTART
State of Alabama

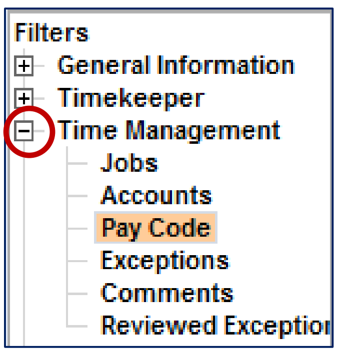
Creating a Personal HyperFind Query



1. Expand **Related Items** and select **Setup.**
2. From the **Common Setup** section**,** select **HyperFind Queries.**
3. From the **Hyperfind Queries** screen, select the **New** button.



4. Select the conditions by expanding the appropriate category from the **Filters** section. In this example, select **Time Management>Pay Code.**



Some commonly used search criteria filters include:

Locating only employees in specific divisions or locations:

General Information > Primary Account

Locating employees based on employment status of inactive or terminated:

Timekeeper > Employment Status

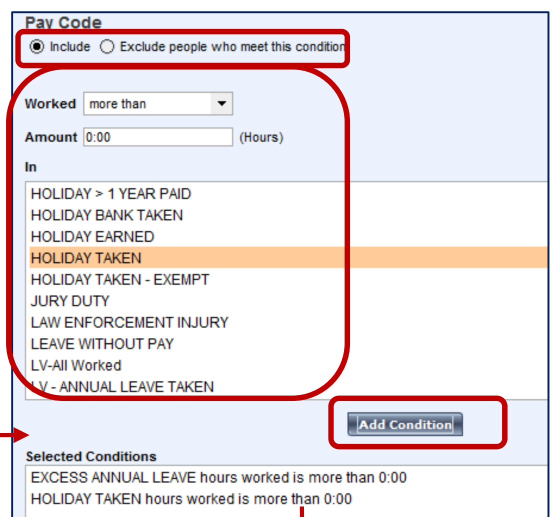
Locating employees who have specific pay code hours, comments, or exceptions:

Time Management > Pay Code

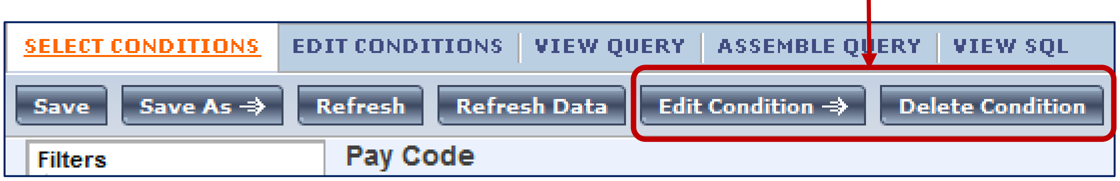
Time Management > Exceptions

Time Management > Comments

5. Click **Include** or **Exclude** to include or exclude employees who match the selected condition.
6. Click one or more conditions and specify any necessary information.
7. Click **Add Condition**.
8. Repeat steps 5 through 7 to add additional conditions.



Note: If you add a condition in error or need to modify a condition, select the condition from the **Selected Conditions** pane and click the **Edit Condition** or **Delete Condition** button.



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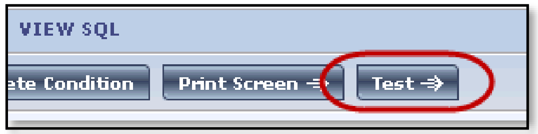
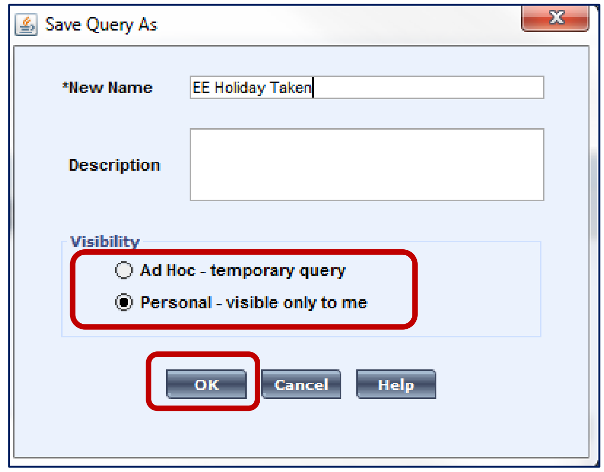
Testing and Saving the Personal HyperFind Query



9. Click the **Test** button to review the sample query results.
10. Click the **X** in the upper right-hand corner of the test window to close the dialog box.

NOTE: If you do not receive the results you expected, edit your conditions.

11. Click **Save** or **Save As**. The **Save Query As** window displays.

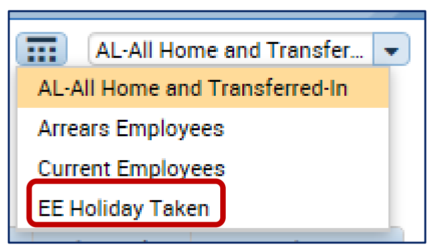


What type of query do you want to create?

12. Select the **Ad Hoc – temporary query** option if you need a temporary query. This query is only available for your current session.
13. Select the **Personal – visible only to me** option if you want a permanent query to use for multiple sessions.

NOTE: If you selected **Personal – visible only to me**, enter a query name. The **Description** field is optional.

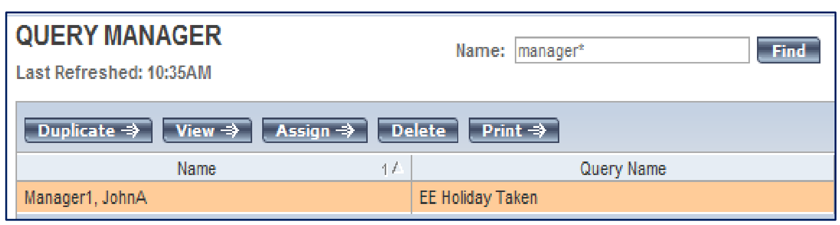
14. Click **OK**.



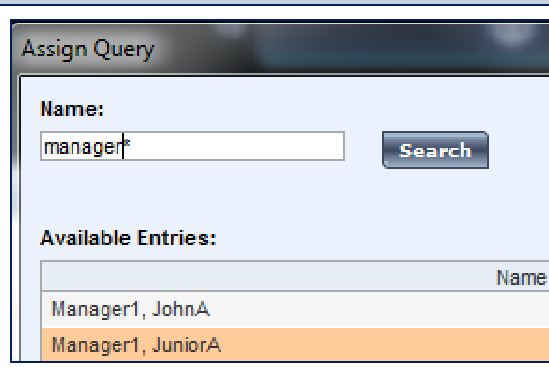
If you created a Personal query, you will be able to view it in the Show drop-down.

Personal queries display in regular text (not bold) in the HyperFind query list.

Assigning a Personal HyperFind Query to Another Person



1. From the **Related Items** pane, select **Setup**. Then select **Query Manager**.
2. Enter search criteria in the **Name** field, then select **Find** to retrieve a list of existing queries.
3. Select the query to be assigned, then click the **Assign** button.
4. The **Assign Query** window displays with a list of available names. A **Search** field is available to narrow the search, if needed.
5. Select the desired name.
6. Select the **OK** button. Message displays to indicate whether assignment was successful.



Note: Only one name may be selected. Repeat steps to assign other managers.

The assigned person now has access to the HyperFind from any of their Show drop-downs.