Hyperfind queries

Hyperfind is a search function that managers use within various system components to find employees who match specified search criteria. For example, in the Employee Summary page, managers click Select Timeframe and Select Hyperfind to display the appropriate employees as of the selected date. The results of the query depend on the manager’s access rights as well as the employees the manager can access. For example, managers with the appropriate access rights can also click Create Hyperfind within the Hyperfind drop-down box to modify or create Hyperfind queries in the Hyperfind Editor.

You can create the following types of Hyperfinds:

- **Home Employees** — A Hyperfind that is used to define additional criteria for the home employees in a manager’s employee group. Home Employees Hyperfinds can be assigned to managers in People Information (Manager Role-General or Manager Role-Assignments) when assigning the manager’s employee group.

- **Ad hoc** — A temporary Hyperfind that only you can use. When you log off, the Hyperfind is deleted.

- **Personal** — The Hyperfind is saved and available for reuse, but only you can access it. To assign a personal Hyperfind to other people, see Query Manager.

- **Public** — The Hyperfind is saved and available for reuse and others can access it.

<table>
<thead>
<tr>
<th>Hyperfind Type</th>
<th>Permanent</th>
<th>Visibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home Employees</td>
<td>Yes</td>
<td>Everyone</td>
</tr>
<tr>
<td>Ad hoc</td>
<td>No</td>
<td>You only</td>
</tr>
<tr>
<td>Personal</td>
<td>Yes</td>
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</tr>
</tbody>
</table>

The system includes default Hyperfind queries as well as an interface that enables you to create and modify queries.

**Who can use Hyperfind queries**

- Managers with access to Hyperfind queries in their Function Access Profile.

- Other users, such as project managers, whose Function AccessProfile allows them to create Hyperfind queries or edit the default queries. The query components available to them can be specified in their function access profile. The queries available to them can be specified in their Hyperfind profile.

- Users who have Hyperfind in their workspace can select the queries assigned to them in their Hyperfind Profile. Generally these users cannot create or edit Hyperfind
queries.

**Edit Function Access Profile to access to Hyperfind queries**

To set access to Hyperfind queries:

1. From the Main Menu, select **Administration > Application Setup > Access Profiles > Function Access Profiles**.
2. Select a profile or click **New**.
3. Expand **Manager - Common Setup**, then expand **Hyperfind**. There are four categories:
   - **Query conditions** — Select the conditions you want to appear in the Hyperfind Editor from the list and select "Allowed."
   - **Query Tabs** — There are two options: **Query Tabs** and **Assemble Query Tabs**.
   - **Query visibility** — There are three options: **ad hoc queries**, **personal queries**, and **public queries**. Allow or disallow **Edit**, **Delete**, or **Both** to each option.
   - **Query Manager** — Set to "Allow" or "Disallow."
4. Click **Save**.

**Default Hyperfind queries**

The following Hyperfind queries are available across the suite by default. Although you can copy one of these queries and edit, the copy, you cannot delete or change the default queries.

**All Home** — Finds employees with a primary labor category assignment that is part of the manager's employee group.

The employees are currently active employees or active users.

**All Home and Scheduled Job Transfers** — Finds:

- Employees in your employee group or organizational group to whom you have access.
- Employees in your employee group or organizational group whose account or primary job is the assigned account or job during the time specified in the search.
- Employees whose account or primary job is different, but who are scheduled to transfer into your employee group or organizational group.

**All Home and Transferred In** — Finds:

- Employees in your home account or organizational group who worked in the specified job or account during the time specified in the search.
- Employees who transferred into the specified labor category and employees who worked this category as their primary labor category.
- Employees whose primary job or labor category is different, but who transferred into the specified labor category or organizational job during the specified time period.
All Home and Transferred-in to both labor category and location — Finds both of the following:

- All employees in the manager's home location (defined using an employee group)

AND

- Employees who have transferred into the manager's assigned labor categories (as defined in an employee group) and the manager's assigned locations (also as defined in an employee group) in the same worked span.

**Note:**

The following setting in System Configuration > System Settings > Global Settings determines which one of the "All Home and Transferred-in Hypernds" displays:

`global.hyperfind.display.inclusiveExclusivelter.switch` — Controls the visibility of two standard "All Home and transferred-in" Hypernds. Select one of the following:

- **Transferred-into Jobs "OR" Labor Categories (inclusive)** — The All Home and Transferred-in to both labor category and location Hyperfind will not be visible. Additionally, the Exclusive transferred-In filters will not be visible in the Time management category when you access Hyperfind filters in the Hyperfind Editor.

- **Transferred into Jobs "AND" Labor Categories (exclusive)** — The All Home and Transferred-in Hyperfind will not be visible. Additionally, the Inclusive transferred-In filters will not be visible in the Time Management category when you access Hyperfind filters in the Hyperfind Editor.

- **ALL** — Both the All home and transferred in AND the All Home and Transferred-in to both labor category and location Hyperfinds will be visible. Both the Exclusive AND Inclusive Transferred-In filters will be visible in the Time Management category when you access Hyperfind filters in the Hyperfind Editor.

**Create a Hyperfind query**

From the Main Menu, select Administration > Application Setup > Common Setup > Hyperfinds. A list of queries appears. Each query finds a specific set of employees.

1. Click Create. The Hyperfind Editor opens.
2. Enter the name. This is the label that users see in the Select Hyperfind dropdown list.
3. Click Add description and then enter a description in the text box.
4. Select the type of Hyperfind that you are creating:
- **Home Employees** — Select Yes in the **Home Employees** field to search for a specific group of employees. All other options on this page are no longer available. When you add conditions, the only filter options available are **Additional Information** and **Reports To** (in **General Information**).

- **Ad Hoc** — Select Yes in the **Ad Hoc** field. The **Home Employee** field is automatically set to No and all other options on the page are unavailable.

- **Personal or Public** — Select No in the **Home Employees** and **Ad Hoc** fields, then select your choice in the **Visibility** field.

5. Click **Add Conditions**. The **Select Conditions** workspace displays the available filters on the left while the rest of the workspace provides the fields applicable to the selected filter. The **Selected Conditions** area at the bottom of the workspace displays the filters that have been selected.

   From the **Select Conditions** workspace, you can:

   - **Add a condition** — When the filter seems suitable to be included in the Hyperfind query, click **Add** to move it to the **Selected Conditions** area.

   - **Delete a condition** — Highlight an already selected condition and press **Delete** to remove the condition.

   - **Modify a condition** — Highlight the condition, make the modification, and click **Update**.

   See **Hyperfind conditions** for more information.

6. After the required conditions are selected, click **Apply** to add the conditions to the Hyperfind query. The newly added conditions are now displayed on the Hyperfind Editor. From here you can:

   - Apply Boolean logic to the selected filters to make for complex filtering. The options can be combined and applied to multiple filters and grouped together for complex conditions.

      - **AND** — The condition will be marked as true if all filters apply to the employee.

      - **OR** — The condition will be marked as true if at least one filter applies to the employee.

      - **EXCLUDE** — The condition will be marked as true if the filter does not apply to the employee.

   - **Group or Ungroup All** or **Delete**

7. When finished, click **Test Hyperfind**. The Test panel opens so you can see a preview of how the filters are applied and what employees are returned. After reviewing the results, click **Done**. Continue to fine-tune the query or click **Save** or **Save As**.

**Edit a Hyperfind query**

Select a Hyperfind from the **Query Name** column on the Hyperfinds page and click **Edit**. The Hyperfind Editor opens with the conditions displayed.

1. Click **Add or Edit Conditions**.
2. From the Select Conditions area, and do the following:

- **Add a condition** — Add a condition as described in Create a Hyperfind query.
- **Delete a condition** — Highlight a condition and press Delete.
- **Modify a condition** — Highlight the condition, make the modification, and click Update.

3. After the required conditions are selected, click **Apply** to add the conditions to the Hyperfind query. The newly added conditions are now displayed on the Hyperfind Editor. From here you can:

- Apply Boolean logic to the selected filters to make for complex filtering. The options can be combined and applied to multiple filters and grouped together for complex conditions.
  - **AND** — The condition will be marked as true if all filters apply to the employee.
  - **OR** — The condition will be marked as true if at least one filter applies to the employee.
  - **EXCLUDE** — The condition will be marked as true if the filter does not apply to the employee.
- **Group or Ungroup All** or Delete

4. When finished, click Test Hyperfind. The Test panel opens so you can see a preview of how the filters are applied and what employees are returned. After reviewing the results, click Done. Continue to fine-tune the query or click Save or Save As.

**Tips**

- Use the default queries that your organization provides for frequently-used functions of your job, such as running standard reports on all employees in your group.
- To perform random or one-time only searches, create an Ad Hoc query that exists until you log off.
- Results of queries that include a range of dates return people who met the condition at some or all of the time frame. This means that a person with an expired job at the end of a pay period is still returned as having an unexpired job because the job was valid for some part of the time frame.
- Queries on expired jobs or locations find the jobs or locations beginning on the first day of expiration. The first day of expiration is the day following the end date specified when the job or location was created. For example, an end date of 12/31/2014 means that the first day of expiration is 1/1/2015.
- Periodically examine the query for excessive nested conditions or too many conditions appended at the end.
- When you create a query that labor accounts conditions, such as Primary Job, it is best to minimize the number of locations that are selected from the tree. If all of the locations and/or jobs under a specific location are to be included in the search, select the location and use the option “include jobs from all locations.”