

When writing and saving queries, only use the myHR Reporting database: <https://myhrreports.northwestern.edu/>. Do not write queries in production.

Generally, saved queries have names that start with the author's initials and are only visible to the author (Private queries). Public queries are visible to all query users.

**Procedure for Saving a New Query**

1. When a user creates a new query, the **Query Name** area shows **New Unsaved Query**.

2. Click **Save** or **Save As** at the bottom of the page.

Records Query Expressions Prompts **Fields** Criteria Having Dependency Transformations

Query Name **New Unsaved Query** Description

View field properties, or use field as criteria in query statement.

| Col | Record.Fieldname   | Format | Ord | XLAT | Agg | Heading Text |
|-----|--------------------|--------|-----|------|-----|--------------|
| 1   | A.EMPLID - Empl ID | Char11 |     |      |     | ID           |

Save Save As New Query Preferences Properties

Publish as Feed Publish as Pivot Grid New Union

Return To Search

3. On the **Enter a name to save this query** page, enter the name in the **Query** field.

- Always start the name of the query with your initials and an underscore.
- Do not start a query name with PUB\_. Public queries created by the HR reporting team start with those letters.
- You cannot have spaces in the name; use underscore to separate words.

Enter a name to save this query:

\*Query **ABC\_NEW\_PROFS\_THIS\_YEAR**

Description New professors this year

Folder

\*Query Type User

\*Owner Private

Query Definition

This query shows professors who started their appointment in the last 12 months.

OK Cancel

4. Add a **Description**.

5. Optional: you can add a **Folder**. A folder is like a tag, it's available when you search for a query. If you have many queries, folders can help you organize them.

6. Leave **Query Type** as **User**.

7. Generally, you want to leave **Owner** as **Private**. Only the author can see a **Private** query. If you want to share your query with others, you can set **Owner** to **Public**. However, if a query is public, all query authors have permission to view, edit, and delete that query.

8. **Query Definition** is an optional free text field where you can put notes about the query. This information is not visible when you search for queries.

9. Click **OK**.

10. The new name will now appear in the **Query Name** area.

Records Query Expressions Prompts **Fields** Criteria Having Dependency Trans

Query Name **ABC\_NEW\_PROFS\_THIS\_YEAR** Description

View field properties, or use field as criteria in query statement.

| Fields |                    |        |     |      |     |         |
|--------|--------------------|--------|-----|------|-----|---------|
| Col    | Record.Fieldname   | Format | Ord | XLAT | Agg | Heading |
| 1      | A.EMPLID - Empl ID | Char11 |     |      |     | ID      |

Save Save As New Query Preferences Properties  
 Publish as Feed Publish as Pivot Grid New Union

**Tip** The query name can be up to 30 characters! Give your query a descriptive name, especially if you have several queries that are similar. Don't call them `ABC_EMPLOYEE_LIST1` and `ABC_EMPLOYEE_LIST2`; months from now you won't remember what these queries do.

#### Procedure for Saving a Private Copy of a Public Query

1. Open the public query for editing.

2. Click **Save As** at the bottom of the page.

3. Change the query name in the **Query** field to start with your initials.

4. Optional: Delete the information in the **Folder** field, or change it to the folder name you want to use.

5. Change the **Owner** to **Private**.

Enter a name to save this query as:

\*Query

Description

Folder

\*Query Type

\*Owner

Query Definition

6. Click **OK**.

**Tip** Always remember to save a private copy of a public query before editing it.

**Procedure for Adding a Query to My Favorites**

1. Favorite queries are always visible on the **Query Manager** search page. If you use some queries frequently, saving them as favorites creates a convenient shortcut.
2. Search for the query.
3. In the **Search Results** list, check the **Select** checkbox.
4. In the **Action** pull-down menu, select **Add to Favorites**.
5. Click **Go**.

**Search Results**

\*Folder View

\*Action

| Query                               |                         | Personalize              |         | Find       |                      |                      |                       |
|-------------------------------------|-------------------------|--------------------------|---------|------------|----------------------|----------------------|-----------------------|
| Select                              | Query Name              | Descr                    | Owner   | Folder     | Edit                 | Run to HTML          | Run to Excel          |
| <input checked="" type="checkbox"/> | ABC_NEW_PROFS_THIS_YEAR | New professors this year | Private | PROFESSORS | <a href="#">Edit</a> | <a href="#">HTML</a> | <a href="#">Excel</a> |

- Now whenever you go to the **Query Manager** page, you will see **My Favorite Queries** as a list on the bottom.

**Query Manager**

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Query](#) | [Create New Query](#)

\*Search By  begins with

[Advanced Search](#)

**My Favorite Queries**

| Query Name              | Descr                    | Owner   |
|-------------------------|--------------------------|---------|
| ABC_NEW_PROFS_THIS_YEAR | New professors this year | Private |

**Tip** You can remove a query from the **My Favorite Queries** list by clicking the blue **Remove** button. To remove all queries from the favorites list, click **Clear Favorites List**. These actions remove the query from the favorites list, they do not delete the query.

### Procedure for Renaming a Query

- Never rename a query that starts with PUB\_. Only rename queries you created.
- Search for the query you want to rename.
- Check the **Select** checkbox.
- In the **Action** pull-down menu, select **Rename Selected**.
- Click **Go**.

**Search Results**

\*Folder View

\*Action

| Query                               |                         | Personalize              |         | Find   |                      |                      |                      |
|-------------------------------------|-------------------------|--------------------------|---------|--------|----------------------|----------------------|----------------------|
| Select                              | Query Name              | Descr                    | Owner   | Folder | Edit                 | Run to HTML          | Run t Excel          |
| <input checked="" type="checkbox"/> | ABC_NEW_PROFS_THIS_YEAR | New professors this year | Private |        | <a href="#">Edit</a> | <a href="#">HTML</a> | <a href="#">Exce</a> |

- Enter the **New Name** for the query. Remember to start the name with your initials.

**Rename Queries**

Enter new names for the queries on the right.

| Query Name              | Owner   | New Name                     |
|-------------------------|---------|------------------------------|
| ABC_NEW_PROFS_THIS_YEAR | Private | ABC_NEW_PROFS_LAST_12_MONTHS |

OK Cancel

- Click **OK**.

### Procedure for Deleting a Query

- Never delete a query that starts with PUB\_. Only delete queries you created.
- Search for the query you want to delete.
- Check the **Select** checkbox.
- In the **Action** pull-down menu, select **Delete Selected**.
- Click **Go**.

**Search Results**

\*Folder View -- All Folders --

Check All Uncheck All

\*Action Delete Selected Go

| Select                              | Query Name                   | Descr                    | Owner   | Folder | Edit | Run to HTML | Run to Ex |
|-------------------------------------|------------------------------|--------------------------|---------|--------|------|-------------|-----------|
| <input checked="" type="checkbox"/> | ABC_NEW_PROFS_LAST_12_MONTHS | New professors this year | Private |        | Edit | HTML        | Ex        |

- On the pop-up confirmation message, click **Yes**.