

CalTime: Creating a Basic Hyperfind

What is a HyperFind query?

HyperFind Queries enable users to view a list of employees based on selected filters. For example, you may be only interested in looking at active employees as of today's date that working in a specific department and have an FLSA of non-exempt.

A basic HyperFind used frequently by Timekeepers consists of:

1. **Select Conditions criteria** (for example; Active as of today, FLSA = Non-Exempt)
2. **Selecting condition joiners** such as using **And, Or, NOT** (for example, Active as of today **AND** FLSA = Non-Exempt).

Select Conditions requirement (Additional Information fields)

If criteria from the Additional Information fields are going to be used in the HyperFind Query, specific syntax requirements must be observed:

- Numerical fields must always be two digits (e.g. 08 for 8 hours Shift Length)
- Alpha Characters must always be uppercase (e.g. N for non--exempt and E for exempt)

Note. See the **appendix of this document for a list of available Select Condition filters and location**

How to use a Condition Joiners (via Assemble Query)?

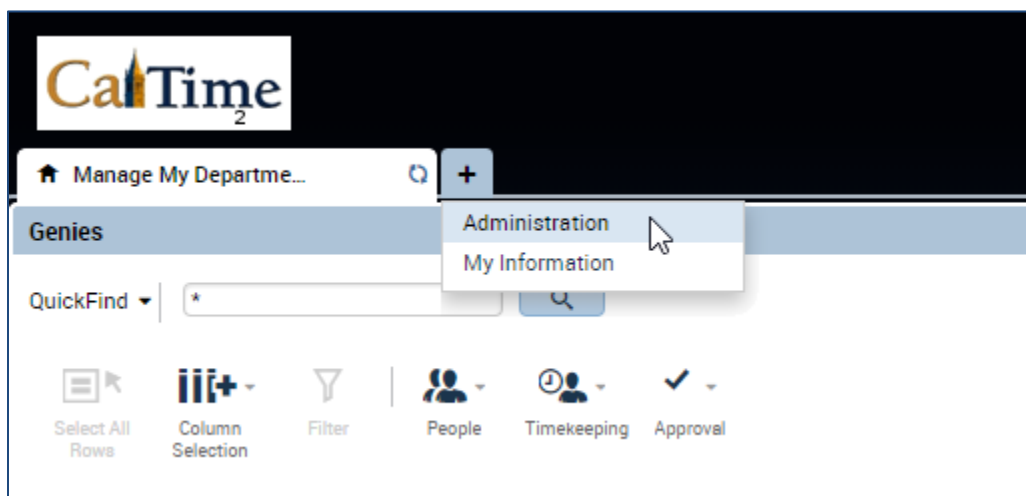
After the conditions criteria is selected, the conditions will need to be assembled using the **And, OR, NOT** joiners. If the HyperFind query being created will be using multiple similar conditions, e.g., multiple **Job Dept IDs**, or multiple **Supervisor IDs**, be sure and use the **OR** joiner to join the similar conditions. The **OR** joiner will allow for multiple similar conditions to be joined, the **AND** joiner will actually restrict the ability of the query to retrieve the desired multiple conditions. The **AND** joiner is used to join disparate condition criteria, e.g., **Job Dept ID** and **FLSA** status.

The following is an example of a HyperFind Query with multiple condition filters (see blue) and condition joiners (see RED).

Select Conditions	Assemble Query	Test
Selected Conditions		
AND	OR	NOT
Disassemble	Disassemble All	Delete
(Additional information Home Department matches FTRAN AND Additional information FLSA matches N AND Employee employed and working as of today) AND (Additional information Title Code matches 5332C OR Additional information Title Code matches 5332C OR Additional information Title Code matches 5333C OR Additional information Title Code matches 5333C OR Additional information Title Code matches 8213C OR Additional information Title Code matches 8485C OR Additional information Title Code matches 8486C)		

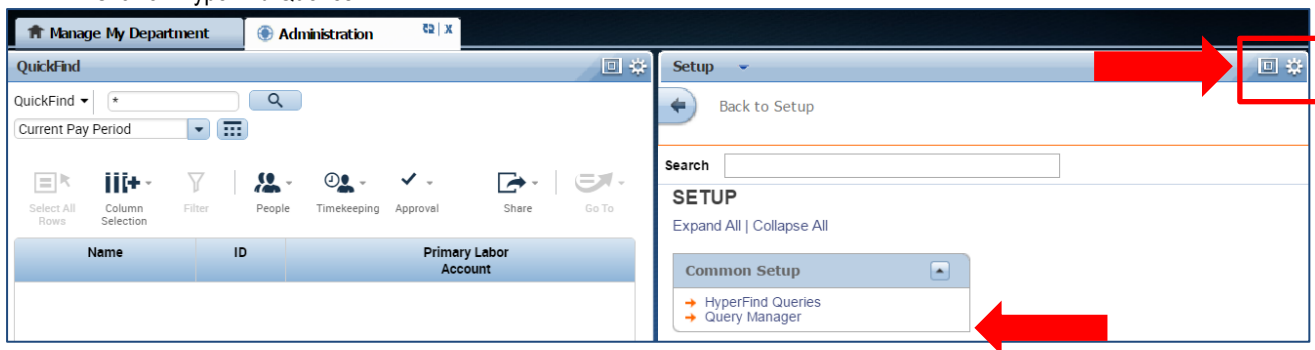
Access HypeFind Queries via Setup

1. Once you have logged into CalTime, click on Workspaces and click on Administration



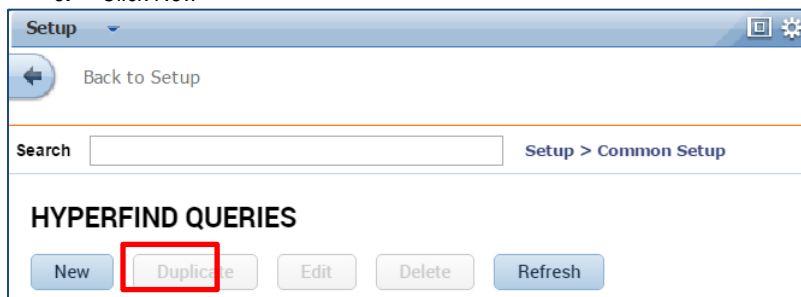
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2. The setup page will automatically open
3. To maximize the setup page, click on icon that appears at the top right (square within a square)
4. Click on Hyperfind Queries

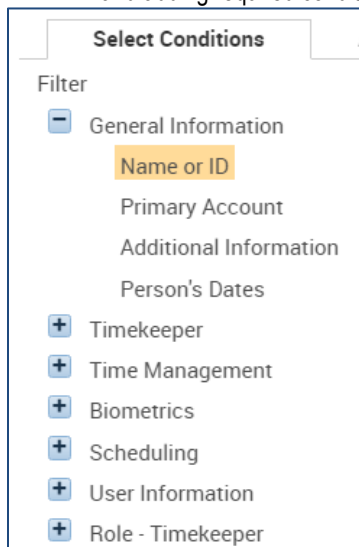


Create Hyperfind

5. Click New



6. The select conditions panel will open on the left side of the setup page. (New Hyperfind queries are built using the available filters and adding required conditions specific to the filter topic.)



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If you click **Primary Account**, all the options for all the labor levels will be available to add as a HyperFind condition. Example --- Primary Account is where specific Job (Friendly Name), Supervisor IDs, or Employee IDs would be selected as query conditions.

The screenshot shows the 'HYPERFIND QUERIES' interface. At the top, there are buttons for 'Save', 'Save As', 'Return', and 'Refresh'. Below these, the 'Visibility' is set to 'Ad Hoc' and the 'Query Name' is 'Ad Hoc'. The 'Description' field is empty. The interface is divided into three tabs: 'Select Conditions', 'Assemble Query', and 'Test'. The 'Select Conditions' tab is active, showing a filter menu on the left. The 'Primary Account' option is highlighted with a red box. The 'Assemble Query' tab is also visible, showing the 'PRIMARY ACCOUNT' condition selected. The 'Include' radio button is selected. The 'Summary' tab is active, showing a table of available items. The 'Wild Card Selection' field is empty. The 'Available Items' field contains '*asst'. The search results show a list of job titles, with 'ATH-FACRENTSTUDASST,ATH-FACRENTSTUDASST' highlighted by a mouse cursor.

If you click **Additional Information**, the following options will be available to add as a HyperFind condition. It is recommended you use job department ID, rather than home department as a condition in your Hyperfind. FLSA status can be an important frequently used condition. Use N for non-exempt and E for exempt employees.

The screenshot shows the 'HYPERFIND QUERIES' interface. At the top, there are buttons for 'Save', 'Save As', 'Return', and 'Refresh'. Below these, the 'Visibility' is set to 'Ad Hoc' and the 'Query Name' is 'Ad Hoc'. The 'Description' field is empty. The interface is divided into three tabs: 'Select Conditions', 'Assemble Query', and 'Test'. The 'Select Conditions' tab is active, showing a filter menu on the left. The 'Additional Information' option is highlighted with a red box. The 'Assemble Query' tab is also visible, showing the 'ADDITIONAL INFORMATION' condition selected. The 'Include' radio button is selected. The 'Additional information' dropdown menu is open, showing a list of options: 'Appointment Type', 'Home Department', 'Comp Time Election', 'Meal Length', 'Shift Length', 'Title Code', 'Shift Occurrence', 'Job Dept ID', and 'FLSA'. The 'Appointment Type' option is highlighted by a mouse cursor.

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7. The Select Conditions Header will appear on the left side of the window (as shown in examples above). The required conditions fields associated with the Select Conditions Header will appear on the right side of the screen.

In the example below, the FLSA from the additional information drop down was selected and and type E for exempt was entered in the field directly below the drop down list. The **Add** button will highlight in blue to prompt the user to Add the field. **Click Add.**

ADDITIONAL INFORMATION

Include Exclude people who meet this condition

Additional information FLSA

E

Selected Conditions **Add** Update Delete

8. If you want to exclude people with a certain condition, click on Exclude people who meet this condition, otherwise select include.

ADDITIONAL INFORMATION

Include Exclude people who meet this condition

Additional information FLSA

E

Selected Conditions **Add** Update Delete

Additional information FLSA matches E

9. Click on Timekeeper and select Employee Status
10. Click on **Active** As of Today button
11. Click **Add** (this will add active employees as of today)

HYPERFIND QUERIES *

Save Save As Return Refresh

Visibility Ad Hoc Query Name Ad Hoc Description

Select Conditions Assemble Query Test

Filter

- General Information
 - Name or ID
 - Primary Account
 - Additional Information
 - Person's Dates
- Timekeeper
 - Hire Date
 - Employment Status**
 - Employment Terms

EMPLOYMENT STATUS

Include Exclude people who meet this condition

Status: Active

As of Today Specific Date 3/24/2017

Selected Conditions **Add** Update Delete

Additional information FLSA matches E

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12. After you click Add, you will see the condition appear in the selected conditions box at the bottom
13. This will bring up employees that are exempt and active as of today.

Selected Conditions Add Update Delete

Additional information FLSA matches E

Employee employed and working as of today

To Edit or Delete HyperFind Condition

14. To edit or delete condition, Select Assemble Query to Edit Condition or Delete Condition

HYPERFIND QUERIES *

Save Save As Return Refresh

Visibility: Ad Hoc Query Name: Ad Hoc Description:

Select Conditions **Assemble Query** Test

Filter: EMPLOYMENT STATUS

15. Click on the condition in box (in blue below) and the NOT and Delete Button will highlight in blue. You only use the NOT button if you do not want to include a condition below or you can delete the condition entirely by clicking on Delete.

Save Save As Return Refresh

Visibility: Ad Hoc Query Name: Ad Hoc

Select Conditions Assemble Query Test

Selected Conditions

AND OR **NOT** Disassemble Disassemble All **Delete**

Additional information FLSA matches E AND
Employee employed and working as of today

To Test Hyperfind based on assigned conditions

16. To test your condition, click on Test. This will enable you to verify your results.

HYPERFIND QUERIES *

Save Save As Return Refresh

Visibility: Ad Hoc Query Name: Ad Hoc

Select Conditions Assemble Query **Test**

Selected Conditions

AND OR **NOT** Disassemble Disassemble All Delete

Additional information FLSA matches E AND
Employee employed and working as of today

To Save HyperFind

17. After a successful test, click on save to start saving the new Hyperfind query. If you click on Save As, a window will appear enabling you to

- To make this HyperFind visible to only you,
- Select the drop down in the visibility field and click on **Personal**

HYPERFIND QUERIES

Save Save As Return Refresh

Visibility Ad Hoc Query Name

Personal Ad Hoc Assemble Query

- You will be prompted to enter a Query name of the hyperfind and you made add a description. See example below.

HYPERFIND QUERIES *

Save Save As Return Refresh

Visibility Personal Query Name * Test report Description Exempt FLSA, All Active employees

New Hyperfinds will display on HyperFind Queries main setup page

Your new hyperfind will appear on the main setup page (see example)

HYPERFIND QUERIES

New Duplicate Edit Delete Refresh

Query Name	Visibility	Description
Test report	Personal	Exempt FLSA, All Active employees