FASIS Administration

Query Development
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Section 1: Query Basics
QUERY TERMINOLOGY AND TOOLS

Overview

Various terms and tools are referenced throughout this guide and are essential to understand before using or creating a query of your own.

Terminology

<table>
<thead>
<tr>
<th>Terms</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>QUERY</td>
<td>Refers to the FASIS reporting component that gives users the ability to produce a report of information from the FASIS database.</td>
</tr>
<tr>
<td>DATABASE</td>
<td>A database is a collection of related data. FASIS is a database that contains demographic and payroll information for former and current Northwestern employees.</td>
</tr>
</tbody>
</table>
| RECORD/TABLE     | Within any database, data is organized into groupings called Records or Tables. These records/tables are the building blocks of the database; each record contains related information. The terms “record” and “table” are used interchangeably. Examples of FASIS records include:  
- Employee Information  
- Department Numbers and Names  
- Location Codes |
| FIELD            | Fields are the separate pieces of information contained within a record. Fields are also used as the column headings for Excel spreadsheets. Some field examples used in FASIS include: Name, Employee ID, Department Name, and Email Address. |
| CRITERIA         | Criteria are used to filter the data retrieved from the FASIS database; they help extract specific information you wish to include in your report. A criterion can be used to include or exclude specific types of information. For example, you can specify that you would like employees in a specific department number by setting a criterion to show only data that includes that department number. |
| PROMPT           | A Prompt provides a means for the user to tell the database what kind of information to retrieve at the moment the query is processed. For example, a prompt can be set to ask the user which department number should be used to retrieve results. Each time the query is run, the user must then enter a department number before results are returned. |
| PUBLIC VS. PRIVATE QUERIES | When saving a query, you will have the option to save it as either Public or Private.  
- Public queries can be seen and accessed by other query users  
- Private queries can be seen only by the person who created it. FASIS has created numerous public queries that can be used by anyone; however, you are required to resave the query under your name first. A list of all public queries provided by FASIS can be found on the FASIS website. |
| **FASIS NAMING CONVENTIONS** | Users are asked to use a particular convention for naming any queries that are created and/or saved, by using your initials, an underscore, and a description of the query.  
Example: CMT_Email_Addresses |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DISTINCT FEATURE</strong></td>
<td>Use the <strong>Distinct</strong> feature when creating or modifying your query to prevent duplicate rows of data from being returned. By using <strong>Distinct</strong>, you ensure that each row or results will have at least one unique feature.</td>
</tr>
</tbody>
</table>
| **REPORTING DATABASE** | Always use the **FASIS Reporting Database** to create, run, and save any queries.  
There are two main FASIS databases: Production and Reporting. Reporting is an exact copy of Production from the night before and is the only database allowed to be used for query access.  
The FASIS Production database is used for running payrolls; using queries in Production can have a negative impact on payroll runs and other time-sensitive processes. |

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**Tools**

Depending upon your individual access to the Query component, the following tools may be available within the FASIS “Reporting Tools” folder:

- **Query Manager** is used by the majority of query users and is the main interface for creating and editing queries.
- **Query Viewer** is for individuals who have run-only query access. These users can view and run queries, but cannot create, edit, delete, or rename them.
- **Query Scheduler** is provided to both Query Manager and Query Viewer users. It allows users to schedule queries to run at specific times, and results may be emailed directly to the query user.
Navigating to the Query Manager

Procedure

1. Open your browser.

2. Navigate to: http://hrweb.northwestern.edu

3. Choose the Reporting database.

4. Using the FASIS Main Menu, navigate to: Reporting Tools > Query > Query Manager.

   You will see the Query Manager homepage, from which you can search for an existing query or create a new one.
# Searching for an Existing Query

## Overview

Users are able to search for an existing query using either the basic or advanced search method. Choosing the advanced method will allow you to search using up to 6 different search criteria and will allow you to change the search operator.

## Using the Basic Search Method

<table>
<thead>
<tr>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.</strong> The search page will always default to the basic search; notice that <strong>Search By</strong> defaults to “Query Name” and the <strong>Search Operator</strong> is set to “begins with.” Notice the “My Favorite Queries” box is shown below the search area. This allows users to easily access frequently used queries without searching for them.</td>
</tr>
<tr>
<td><img src="image" alt="Query Manager" /></td>
</tr>
<tr>
<td><strong>2.</strong> Navigate to: <a href="http://hrweb.northwestern.edu">http://hrweb.northwestern.edu</a></td>
</tr>
<tr>
<td><strong>3.</strong> Type the query name into the empty <strong>Search By</strong> box. Because the “begins with” search operator is set, you may simply enter the beginning part of any query name.</td>
</tr>
<tr>
<td><img src="image" alt="Search By" /></td>
</tr>
<tr>
<td><strong>4.</strong> Click <a href="image">Search</a>.</td>
</tr>
</tbody>
</table>
Searching for an Existing Query

5. Any queries that match the search string will display below the Search Results. Queries are organized alphabetically, but all Private queries will be listed before the Public queries.

Using the Advanced Search Method

Procedure

1. Click the Advanced Search link to use up to eight search categories and a variety of search operators:

2. For each line, the search operator defaults to “begins with” – use the dropdown box to choose from a variety of options.

The most useful operators are usually “begins with,” “contains,” and “equal to.” Use “contains” to search for a word that is within the query name; use “equal to” to find an exact match.

3. After setting your search criteria, click Search.
Advanced Search Summary

Searching by **Query Name** and **Description** are fairly self-explanatory. You will probably use the **Query Name** field most often when searching for a query.

**Uses Record Name** and **Uses Field Name** will find queries that use a particular record/table or field when retrieving data.

**Folder Name** allows you to search for queries within a particular customized folder.

**Owner** allows you to specify whether you are looking for a public or a private query.

**Access Group Name** and **Query Type** are not used.
RUNNING AN EXISTING QUERY

Overview

Users have the ability to run any existing Public queries, or any of their own Private queries. Query results can be provided on-screen or downloaded into an Excel or CSV (text file) format.

Running a Query Directly From the Search Result

Procedure

1. Search for the query you would like to run using either the basic or advanced search method described previously:

   ![Search Results](image)

2. To view the results directly on screen or to download into a CSV (text) file, click the “HTML” link. To download an Excel spreadsheet of the results, click “Excel.”

3. If you click “HTML,” the results will be provided on-screen.

   Notice the number of returned rows and scroll arrows on the right side. Only 100 rows will be shown on a page; use this scroll section to look through all results if there are more than 100.

   To download the data into an Excel, CSV, or XML file format, click the appropriate link.

   ![Download results in](image)

4. Clicking the Excel link in Step 2, or the Excel, CSV, or XML link above, will automatically create a downloadable file of your results which you can choose to open or save as you would with any file downloaded through your browser.
## Running a Query From Inside the Query

<table>
<thead>
<tr>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Search for the query you would like to run using either the basic or advanced search method described previously:</td>
</tr>
<tr>
<td>2. Click the “Edit” link to open the query.</td>
</tr>
<tr>
<td>3. At any time while the query is open, you can click the “Run” tab in the upper right corner to immediately run the query:</td>
</tr>
<tr>
<td>4. The results will be displayed on screen, and you will can download them into an Excel or CSV file by clicking the appropriate link:</td>
</tr>
</tbody>
</table>
Section 2:
Modifying an Existing Public Query
RESAVING A PUBLIC QUERY

Overview

Prior to modifying any public query for your own use, it is important to first resave a copy the query using your own initials. This ensures that the main public queries are not changed or modified and are available in their original state to all FASIS Query users.

Resaving the Query

**Procedure**

1. Search for the query you would like to modify and select the “Edit” link:

2. Choose the “Save As” link at the bottom left before making any changes:
3. Enter a new name for the query in the **Query** box, using the FASIS naming conventions. Note that spaces are not allowed; use underscores instead:

4. You may also enter a **Description** for the query. If you would like to save it into a customized folder, enter the **Folder** name.

5. Set **Owner** to either “Public” or “Private.”
   Note: **Query Type** should always be set to “User.”

6. Click **OK**.
MODIFYING THE FIELDS OF A QUERY

Overview

The “Fields” tab shows which fields will be displayed in the final output report. Users have the ability to customize how the fields will appear. Below are examples of changes you may wish to make to the way fields are displayed in your report.

Sorting the Output Results

Results are sorted based on particular fields, and the sort order and be customized to suit your needs. In this example, we will sort employee addresses by city.

Procedure

1. Make sure you are in the “Fields” tab of the query and click the Reorder / Sort button:

   ![Query Development Screen]

2. In the CITY row, type “1” into the New Order By box. This will ensure the results are ordered by city first.

   ![Edit Field Ordering Screen]

   You can order by additional fields by entering the appropriate numbers in the New Order By column. For example, if we want employees sorted primarily by city, but secondarily by name, we would enter “2” for the NAME row.

   If you would like to sort in descending (Z-A) order, check the Descending box. If not checked, results will be sorted ascending (A-Z).
Change the Order of Columns

Columns can be easily reordered before the query is run. In this example, we want to move the employee’s phone number so that it displays before their address.

Procedure

1. Make sure you are in the “Fields” tab of the query and click the Reorder / Sort button:

2. In the HOME_PHONE row, type “3” into the New Column box. This will move the phone number to position 3, right after NAME. Everything after that will automatically move down; there is no need to enter numbers for each row.

3. Click OK.
Modifying the Fields of a Query

Customize Column Heading Text

Column headers default to the field name within FASIS; however, headers can be modified before running the query. In this example, we will change the Heading Text for EMPLID so that it reads “Employee ID”.

<table>
<thead>
<tr>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Make sure you are in the “Fields” tab of the query. In the EMPLID row, click the button:</td>
</tr>
</tbody>
</table>

![Image of query interface showing EMPLID field with Edit button highlighted]

| 2. In the Heading box, select the radio button for Text and type “Employee ID” into the Heading Text box. |

![Image of Edit Field Properties dialog with Employee ID text entered]

Do not modify the Unique Field Name box, as it could cause errors in your query.

| 3. Click OK. |
Add a Field to the Output Results

You can add additional fields to the output results if you require a piece of data that wasn’t included in the original public query. In this instance, we will add the employee’s home address country.

**Procedure**

1. Click the “Query” tab at the top of the screen. This tab will display all records (tables) that are being used in the query:

   ![Query Tab Screen](image)

2. Click the ![field_icon](image) icon to the left of the table that contains the field you want to add. A list of that table’s fields will display, and the ones already being included are marked with a check.

   Locate the COUNTRY field and check it:

   ![Field Selection Screen](image)

   Remember, you may have to use the scroll arrows to see all of the fields available.

3. As soon as the field is checked, it is automatically added to the output results.

Remove a Field From the Output Results

You can remove any field from the output results if it is not required for your reporting purposes. In this instance, we will remove the employee’s phone number.

**Procedure**

1. Make sure you are in the “Fields” tab of the query.
2. Click the button to the right of the HOME_PHONE row:

3. The field will be immediately removed from your results and will disappear from the Fields screen.
MODIFYING A CRITERION OF AN EXISTING QUERY

Overview

Criteria set on each query tell FASIS which specific information to include or exclude from your report. When entering or modifying a criterion, it is important to know how the data is stored in the system. Your criteria must exactly match the information in FASIS for them to work correctly. All FASIS fields are case-sensitive, so pay particular attention to how FASIS stores the values that you are using for Criteria.

How to Modify a Criterion

Procedure

1. Click on the “Criteria” tab of the query; the current criteria will be displayed for you:

   Any criterion involving an “Effective Date” is usually added automatically by FASIS and should be left alone. This is placed to ensure that your query receives current data, and not future data that has already been entered into the system.

   The second criterion above tells FASIS to show us only the employees who are paid monthly, i.e. those with a Pay Group equal to “MON”.

2. We want to modify the second criterion above to instead show us only the biweekly regular employees, or those employees with a Pay Group of “BIR”.

   To do so, first click the button next to the second criterion.
3. Change the Constant from “MON” to “BIR”:

4. Click **OK** to save the changes.
# Saving and Running the Modified Query

## Overview

Once you make changes to the query, be sure to save it again to retain your modifications. *Be sure that you’ve already saved the query using your initials first; otherwise you will overwrite the Public query for all other FASIS users.*

## Saving the Query

<table>
<thead>
<tr>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click on the “Properties” link at the bottom of any tab of your query (except the Run tab).</td>
</tr>
<tr>
<td>2. Ensure that the <strong>Query</strong> name begins with your initials and not “PUB”. You can change the name if you like. Choose the <strong>Distinct</strong> checkbox – this will ensure that you don’t receive duplicate rows of results.</td>
</tr>
<tr>
<td><img src="image" alt="Query Properties" /></td>
</tr>
<tr>
<td>3. Click <strong>OK</strong>.</td>
</tr>
<tr>
<td>4. Click the “Run” tab to see the results of your updated query.</td>
</tr>
</tbody>
</table>
Section 3:
Maintaining Queries
Adding a Query to “My Favorites”

Overview

Public or private queries that are used on a regular basis can be added to a “Favorites” folder. Queries marked as a “Favorite” will always appear at the bottom of the query search screen with you enter Query Manager, allowing quick access without having to use the search function.

How to Add a Favorite

<table>
<thead>
<tr>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
</tr>
<tr>
<td>2.</td>
</tr>
<tr>
<td>3.</td>
</tr>
<tr>
<td>4.</td>
</tr>
</tbody>
</table>

To remove queries from your favorites box, click the button. This will not delete your query; it will still be accessible by searching.
USING CUSTOM FOLDERS FOR QUERIES

Overview

All users have the ability to create custom folders to organize and sort large numbers of queries.

Creating a Folder and Adding a Query to It

<table>
<thead>
<tr>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.</strong> Search for all or part of the query name you wish to add as a favorite.</td>
</tr>
<tr>
<td><strong>2.</strong> In the Search Results list, select the checkbox next to the queries you wish to save to a custom folder:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Query</th>
<th>Customize</th>
<th>Find</th>
<th>View All</th>
<th>Run to HTML</th>
<th>Run to Excel</th>
<th>Run to XML</th>
<th>Schedule</th>
</tr>
</thead>
<tbody>
<tr>
<td>Folder View: All Folders --</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CMT_EMPLOYEES_ADDRESS</td>
<td>Attribute mappings</td>
<td>Public</td>
<td>Edit</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
</tr>
<tr>
<td>CM_ATTRIBUTES</td>
<td>Dimension Control Table</td>
<td>Public</td>
<td>Edit</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
</tr>
<tr>
<td>CM_FACT_CTRL_TBL</td>
<td>Fact Control Table</td>
<td>Public</td>
<td>Edit</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
</tr>
<tr>
<td>CM_FACT_MAP_TBL</td>
<td>Fact Map Table</td>
<td>Public</td>
<td>Edit</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
</tr>
<tr>
<td>CM_FIELD_PROPERTIES</td>
<td>Public</td>
<td>Edit</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
<td></td>
</tr>
<tr>
<td>CM_HIER_CTRL_TBL</td>
<td>Hierarchy Control table</td>
<td>Public</td>
<td>Edit</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
</tr>
<tr>
<td>CM_HIER_MAP_TBL</td>
<td>Hierarchy Map Table</td>
<td>Public</td>
<td>Edit</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
</tr>
<tr>
<td>CM_ATTRIBUTES</td>
<td>Dimension Control Table</td>
<td>Public</td>
<td>Edit</td>
<td>HTML</td>
<td>Excel</td>
<td>XML</td>
<td>Schedule</td>
</tr>
</tbody>
</table>

| **3.** In the **Action** drop-down box, choose the “Move to Folder” option. |
| **4.** Click **Go**. |

| **5.** If you would like to store the query in a folder you have already created, select the first radio button and choose the existing folder in the **Select an existing folder to move to** box. |

To create a new folder, choose the second radio button and type the name of the folder. |

In this case, we will create a new folder titled “Employees” for this query: |

| **6.** Click **OK**. |
Viewing Queries in Custom Folders

### Procedure

1. **Search for all or part of a query name.** In order to see the folders list, you must first conduct a search.

2. **At the top of the Search Results list, choose the Folder View drop-down box and select the folder you’d like to see.**

   ![Search Results](image1)

3. **After selecting a folder, the page automatically refreshes and displays a list of queries in that folder:**

   ![Search Results](image2)

---

Northwestern University Faculty and Staff Information Systems
RENAMING QUERIES

Overview

Users can rename their queries at any time; please note that the FASIS-provided public queries (query names that begin with “PUB_”) should never be renamed – always resave them under a different name using the “Resaving a Public Query” procedures described previously.

How to Rename Queries

<table>
<thead>
<tr>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Search for the query or queries you would like to modify using the full or partial query name. Select the checkbox next to each query to rename (you may select one or more than one to rename at a time):</td>
</tr>
<tr>
<td>2. In the Action drop-down menu, select “Rename Selected” and click the button.</td>
</tr>
<tr>
<td>3. For each query you selected, enter the new name in the New Name box. Don’t forget to use the FASIS naming policy by starting each name with your initials and an underscore:</td>
</tr>
<tr>
<td>4. Click OK.</td>
</tr>
</tbody>
</table>
DELETING QUERIES

Overview

Users can delete unused queries at any time; it is always good practice to clean up your query list on a regular basis to remove the queries you no longer use.

Please remember never to delete any queries that begin with “PUB_” – only delete queries you have created or copied that begin with your own initials.

How to Delete Queries

<table>
<thead>
<tr>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Search for the query or queries you would like to delete using the full or partial query name. Select the checkbox next to each query to delete (you may select one or more than one at a time):</td>
</tr>
<tr>
<td>2. In the Action drop-down menu, select “Delete Selected” and click the Go button.</td>
</tr>
<tr>
<td>3. You will receive a confirmation to delete the selected queries; if you do want to delete them, click Yes.</td>
</tr>
<tr>
<td>4. Your selected queries will be permanently deleted.</td>
</tr>
</tbody>
</table>
**COPYING A PRIVATE QUERY TO ANOTHER USER**

**Overview**

While all Query users can search for and use any query saved as “Public,” only the original author can see his or her own “Private” queries. If you wish to share a Private query with another user, you can easily copy the query to that person without needing to set it to Public.

**How to Copy a Query to Another User**

To copy a query to another Query user, the following conditions must be met:

- The copied query must be Private.
- You must know the FASIS User ID (not NetID) of the person to whom you wish to copy the query.
- The person who receives the query must have FASIS Query access and must have security access to all records (tables) used in the query.

**Procedure**

1. Search for the query or queries you would like to copy using the full or partial query name. Select the checkbox next to each query to copy (you may select one or more than one). Ensure that the **Owner** field shows that the query is “Private”:

   ![Query Search Screenshot]

2. In the **Action** drop-down menu, select “Copy to User” and click the **Go** button.

3. Enter the FASIS User ID for the person you wish to copy the query to:

   ![Enter User ID]

4. Click **OK**. You will receive confirmation that the query has been copied and a reminder that the new user must have access to all records in the query to be able to see it.

The new user will be able to see the query by searching for the same name; the copied query will be saved as a “Private” query in their User ID. The user can follow the normal procedures to rename or edit that query as necessary.

**Note:** If the original user saved the query to a custom folder, it will be placed in the same folder for the new user.
Section 4:
Creating New Queries
1. Adding a Record (Table)

How to Add a Record

The first step in creating a new query is to determine which records in FASIS contain the information you need and add them to your query.

For this example, we will assume that your supervisor has asked you to create a list of monthly-paid staff in your department. Your supervisor would like the list to include each employee’s name, emplid, position type, pay group, position number, and the standard number of work hours.

<table>
<thead>
<tr>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click the “Create a New Query” link at the bottom of the query search page:</td>
</tr>
<tr>
<td><img src="image" alt="Query Manager" /></td>
</tr>
<tr>
<td>2. The new query will open the “Records” tab.</td>
</tr>
<tr>
<td><img src="image" alt="Find an Existing Record" /></td>
</tr>
<tr>
<td>Search By: Record Name begins with</td>
</tr>
<tr>
<td>Search Results</td>
</tr>
<tr>
<td>Record</td>
</tr>
<tr>
<td>Rename</td>
</tr>
<tr>
<td>DEPT_TBL</td>
</tr>
<tr>
<td>EMPLOYEES</td>
</tr>
<tr>
<td>NW_EMPLOYEES</td>
</tr>
<tr>
<td>3. Determine which record contains the information you need. In this case, we need only active employees, so we will use the table NW_EMPLOYEES.</td>
</tr>
<tr>
<td>Note: NW_EMPLOYEES is a common table used when looking for active employee information. It does not include terminated employees.</td>
</tr>
</tbody>
</table>
4. Click the “Show Field” link next to NW_EMPLOYEES to see which fields are available in that record:

<table>
<thead>
<tr>
<th>Fieldname</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y</td>
<td>EMPLID - Empl ID</td>
</tr>
<tr>
<td>Y</td>
<td>EMPL_RCD - Empl Record</td>
</tr>
<tr>
<td>EFFDT</td>
<td>Effective Date</td>
</tr>
<tr>
<td>EFFSEQ</td>
<td>Effective Sequence</td>
</tr>
<tr>
<td>NAME</td>
<td>Name</td>
</tr>
<tr>
<td>PAYGROUP</td>
<td>Pay Group</td>
</tr>
</tbody>
</table>

A full list will pop up, and we can see that NW_EMPLOYEES includes everything we need: NAME, EMPLID, PAYGROUP, POSITION_NBR (Position Number), NW_POSN_TYPE (Position Type), and STD_HOURS (Standard Hours). Note the full list is not shown above for space reasons.

4. Click Return at the bottom of the list to exit the field view and return to the query.

Note: It is important to always use the navigation buttons within FASIS, and not your browser’s Back and Forward buttons.

5. Click the “Add Record” link next to NW_EMPLOYEES to add the record to your query.

Note: If you know the record you need to use, you can search for the record by name. If you’re unsure which record contains the information you’re looking for, change the Search By drop-down box to “Contains Field Name” and search by field.

6. The following notice concerning an Effective Date Criteria will be displayed:

An effective date criteria has been automatically added for this effective dated record. (138,60)

Click OK to acknowledge the message.
7. After clicking OK, the record will be added to your query and the “Query” tab will automatically open, allowing you to see the fields of the table you just added:
2. SELECTING FIELDS

How to Select Fields

After adding one or more records to your query, you must next select the fields that you would like to display in the results. Every field is a separate piece of information contained in the record. In our running example, Name, Emplid, Position Type, Pay Group, Position Number, and Standard Hours are all examples of fields.

Procedure

1. Ensure you are in the “Query” tab of the query editor.

2. Select the checkbox to the left of the field name for any field you wish to add to your report:

   ![Query Editor Screenshot]

   *Note: Don’t forget to use the scroll buttons to access all fields.*

   *Tip: If you are having trouble finding a field to select, use the button at the top right to sort fields alphabetically by name.*

3. After selecting the fields to add, click to the “Fields” tab to see what has been added to your report:

   ![Fields Tab Screenshot]

4. You may adjust the display order, sort order, and heading text of the fields to match the needs of your report. For more information, see the section *Modifying and Existing Query.*
3. Establishing Criteria

Overview

Criteria can be set on your query to filter the data retrieved from the FASIS database. Criteria help to extract specific information by excluding or include particular sets of data.

There are three ways to establish criteria:

- **Using the Criteria Tab** is the most time consuming, but fields can be used that may or may not appear in the final report.
- **Using the Fields Tab** is a quick way to add criteria for fields that also appear in your final report.
- **Using the Query Tab** will allow criteria to be set for all available fields in the records you are using.

Establishing Criteria Using the **Criteria Tab**

<table>
<thead>
<tr>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click the “Criteria” tab.</td>
</tr>
<tr>
<td>2. All criteria currently set on the query (if any) will be shown. In our running example, you will see the automatic Effective Date criterion that was discussed earlier. Never delete this, as it will help ensure only current information is included in your report.</td>
</tr>
<tr>
<td>3. Click the <strong>Add Criteria</strong> button. A blank criteria screen will be displayed:</td>
</tr>
</tbody>
</table>

[Image of the criteria screen with options for creating criteria expressions and conditions.]
4. In this example, we want only staff members included in our report; we must add a criterion to tell FASIS that only employees with a Position Type of Staff should be displayed.

   In the **Expression 1** box, click the button.

5. Notice that the record we added, NW_EMPLOYEES, is assigned the letter “A”, and the list of fields now begin with “A.” A letter is always assigned to each record added into your query; this is useful to distinguish where fields are coming from when using multiple records at the same time.

   Find and select the field NW_POSN_TYPE to add it to your criteria.

6. After selecting the field, you are returned to the Edit Criteria screen; notice the field NW_POSN_TYPE is now in the **Expression 1** box.

7. The **Condition Type** drop-down box should remain at “equal to”, since our goal is to find Position Types that equal staff.

   *Note: To learn more about the various Condition Type options, see the Using the Criteria Condition Types section.*
8. In the **Expression 2** box, enter STF for the **Constant**. STF is the value for “Staff” in FASIS.

Remember, we must always use the value as stored in FASIS for the query to work. In this case, FASIS refers to Staff as “STF.”

*Note: If you are unsure what to enter in the Constant box, clicking on the button may provide options available for use.*

9. Click the **OK** button. Notice the criterion has been added to the list in the Criteria tab:

---

### Establishing Criteria using the **Fields Tab**

**Procedure**

1. Click the “Fields” tab.

2. Find the field you want to establish a criterion for and click the button to the right of that field.

In our example, we want to show only monthly paid employees, so we will choose the PAYGROUP field:

*Note: To use this feature, the field you select for the criteria must be included in your report results.*
3. Establishing Criteria

We are taken to the Edit Criteria page, but notice how PAYGROUP is now automatically entered in the Expression 1 box:

4. The Condition Type drop-down box should remain at “equal to”, since our goal is to find Pay Groups that equal monthly.

5. In the Expression 2 box, enter MON for the Constant. MON is the value for “Monthly Paid Staff” in FASIS. Note: If you are unsure what to enter in the Constant box, clicking on the button may provide options available for use.

6. Click the button to add the criterion.

Establishing Criteria Using the Query Tab

Using the Query tab to enter criteria works exactly like using the Fields tab, except in this scenario you can access any fields in the records your query is using, even if they are not selected for output.

Procedure

1. Click the “Criteria” tab.

2. Click the Reorder Criteria button:

   - Query Name: New Unsaved Query
   - Description:
   - Add Criteria, Group Criteria, Reorder Criteria
   - Logical: A.EFFDT - Effective Date, A.NW_POSN_TYPE - Position Type
   - Expression 1: Eff Date <= Current Date (EffSeq = Last)
   - Expression 2: equal to STF
   - Condition Type: equal to
   - Edit, Delete

   - Pay Group - Pay Group
   - Equal to
   - MON

   - Save, Save As, New Query, Preferences, Properties, Publish as Feed, New Union, Return To Search
3. Follow steps 2-6 above in the “Establishing Criteria Using the Fields Tab” section.
3b. REORDERING CRITERIA

Overview

Criteria can be reordered to assist with complex filtering and data retrieval. For most FASIS queries it will not be necessary to reorder criteria; however, it may be useful for more sophisticated queries that involved many records and numerous criteria.

How to Reorder Criteria

<table>
<thead>
<tr>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click the “Criteria” tab.</td>
</tr>
<tr>
<td>2. Click the <strong>Reorder Criteria</strong> button:</td>
</tr>
<tr>
<td>3. In the <strong>New Position</strong> column, renumber the criteria in the order they should be processed when the query is run:</td>
</tr>
<tr>
<td>4. Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>
4. SAVING AND RUNNING YOUR QUERY

Overview
After finalizing your records, fields, and criteria, your query can be saved for access or modification at a later date.

Saving Your Query

<table>
<thead>
<tr>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.</strong> At the bottom of any tab, click the “Properties” link.</td>
</tr>
<tr>
<td><strong>2.</strong> The Query Properties screen will be displayed:</td>
</tr>
<tr>
<td><strong>3.</strong> Enter the query’s name in the <strong>Query</strong> box; be sure to use the FASIS naming scheme of <strong>YourInitials_Description</strong>.</td>
</tr>
<tr>
<td><strong>4.</strong> Enter the date you created the query into the <strong>Description</strong> box.</td>
</tr>
<tr>
<td><strong>5.</strong> If you want to save the query into a custom folder, enter that name in the <strong>Folder</strong> box. If the folder does not exist, it will be created when you save the query.</td>
</tr>
<tr>
<td><strong>6.</strong> Using the <strong>Owner</strong> drop-down, choose whether you want to set your query as “Public” or “Private.”</td>
</tr>
<tr>
<td><strong>7.</strong> Check the <strong>Distinct</strong> checkbox; this will ensure you do not receive duplicate rows in your query results.</td>
</tr>
<tr>
<td><strong>8.</strong> Click <strong>OK</strong> to save the query Properties. You will return to the query editing screen.</td>
</tr>
<tr>
<td><strong>9.</strong> Click <strong>Save</strong> in the bottom left to save your query.</td>
</tr>
</tbody>
</table>
Section 5:
Building Complex Queries
WORKING WITH MULTIPLE RECORDS (JOINS)

Overview

Many times the information you are looking for will not be contained within one record; in those instances, multiple records will need to be joined together to produce the information you need.

There are three different Join options available in FASIS, each with its own advantages and disadvantages:

- Any Record Join
- Record Hierarchy Join
- Related Join

In most instances, the Any Record Join will be used to address the needs of a specific query; however, all three joins are described in further detail in this section.

Join Terminology

The following terms are used in this section to explain the function and creation of joins:

- **Join**: a join retrieves data from more than one table, presenting the data as if it came from one source
- **Key Field**: a Key Field uniquely identifies a row of data and is identified by a key icon in FASIS. A key field also is used to join one record to another when both records share the same field.

Any Record Join

The **Any Record Join** means that results are retrieved only when there is a match between key fields. A user must manually join the tables together to achieve an Any Record Join.

In this example, your supervisor would like you to include the employees' University Mailing Location into the query we created previously (for monthly paid staff employees). That query uses the NW_EMPLOYEES record, but the University Mailing Address is not on NW_EMPLOYEES. We must join an additional record to add the address into our results.

<table>
<thead>
<tr>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Since we are editing an existing query, we will first find and open the one created in the previous section.</td>
</tr>
<tr>
<td>2. To add a record to this query, click on the “Records” tab.</td>
</tr>
</tbody>
</table>
| 3. Search for the record “NW_LABEL”:

Note: The record NW_LABEL is a table that contains the University mailing address for all employees. In most instances, it is an on-campus office address; however, some employees may use their home address or an off-campus office for official mail. |
4. Click **Search**. The NW_LABEL table will be displayed in the Search Results area:

<table>
<thead>
<tr>
<th>Record</th>
<th>Customize</th>
<th>Find</th>
<th>View All</th>
<th>First</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rename</td>
<td>Join Record</td>
<td>Show Fields</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NW_LABEL - Table to create mailing labels</td>
<td>Join Record</td>
<td>Show Fields</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

5. Remember, to join records together, there must be at least one Key Field in common between them. Check the Key Fields of NW_LABEL by clicking the “Show Fields” link:

All key fields have a “Y” listed in the Key column. We see that for NW_LABEL, EMPLID is a Key Field. We know EMPLID is also on the NW_EMPLOYEES table; since it is on both, we can join these tables together.

Click **Return** to return to the Records tab of your query.

6. Click the “Join Record” link next to the NW_LABEL table. The join page will show two boxes:

7. **Join Type** defaults to “Standard Join.” Leave this choice as is. Please note that Left Outer Joins will not be covered in this manual.

   In the **Join Record** box, you will see a list of all records currently used in your query; click the record to use for this join. In our example, there is only one option, so we will click the A = NW_EMPLOYEES record.

   You will see the **Auto Join Criteria** page:
8. FASIS will detect any Key Fields that are common between the two tables. Click the button to complete the join.

*Note: If no common Key Fields are found, you will receive a message stating, “No join conditions found between the records.” Proceeding with a join in this instance may result in inaccurate query results.*

9. You will be taken to the Query tab, where you can see that NW_LABEL has been added to your query, and was assigned the letter “B” for reference:

![Query Tab Screenshot]

The fields for NW_LABEL will be listed directly underneath the table name. Go through the list of fields and select those that you would like to add in to the display of your query results.

10. Click the Fields tab. You will now see a list of all fields that will be shown in your results; the fields that begin with “A” will come from NW_EMPLOYEES, and the fields beginning with “B” will come from NW_LABEL:

![Fields Tab Screenshot]

---

**Related Record Join**

The **Related Record Join** allows users to automatically join two related records from within the Query tab.

Building upon our example, we now have a query with Employee information and University mailing addresses. Now we would like to add the employee’s physical (i.e. office) location as well. We know that the physical location is not on the NW_EMPLOYEE or NW_LABEL records, but NW_EMPLOYEE does contain a field called LOCATION (Location Code). While this code means nothing by itself, we can join record LOCATION_TBL to our query.

**Procedure**

1. Click the Query tab.
2. We need to find the field LOCATION on the record NW_EMPLOYEES. All Related Record Joins take place at the field level.

If not already open, click the NW_EMPLOYEES record so its fields are displayed:

FASIS automatically identifies the Related Record Join: it knows that LOCATION_TBL is related to the Location Code, and provides a direct link to create the join. Click the link.

4. Keep the default “Standard Join” selected and click OK.

5. Because LOCATION_TBL is an Effective Dated table, you will receive the standard notice that an Effective Date criterion has been added. Click OK.

6. LOCATION_TBL is now added to your query and is assigned the letter “C”:

Select the checkboxes for any fields you wish to add to your final results.
### Record Hierarchy Join

The **Record Hierarchy Join** joins a “parent” record to a “child” record. The “child” record uses all of the same Key Fields as the parent, plus at least one more.

For this example, let’s assume we have a basic query that uses the POSITION_DATA table to create a report of position information for your department, such as Position Numbers and titles. We also want to add position funding (chartstring) information. While we know funding is not on the POSITION_DATA table, we are unsure where we can find it. However, it might be safe to assume that position funding is a “child” of POSITION_DATA, so we can attempt a Hierarchy join to locate and join it.

#### Procedure

1. Click the Query tab. To the left of the table name is a link called Hierarchy Join:

   ![Hierarchy Join](image)

   - Choose the POSITION_DATA table and click Hierarchy Join to see a list of tables that have a parent/child relationship with POSITION_DATA:

   ![Hierarchy Join](image)

   - Notice NW_POSN_DIST is automatically added to the query:

   ![Hierarchy Join](image)

   Go through the fields and check the boxes for those that you would like to add to your query.
USING THE CRITERIA CONDITION TYPES

Overview

Users can further refine their criteria by using a number of different condition types. So far, we have only discussed the most obvious “equal to” condition.

This section will describe how to exclude data using the “not” condition types, and will then explain in detail the use for “Like,” “In List,” “Is Null”, and “Between.”

“Not” and Comparative Condition Types

The following conditions are relatively self-explanatory and don’t require a great deal of explanation:

<table>
<thead>
<tr>
<th>Terms</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NOT EQUAL TO</td>
<td>To exclude specific data based on the criteria, the Not Equal To condition type can be used.</td>
</tr>
<tr>
<td></td>
<td>For example, if you would like your query to include all employee types except temporary employees, you can create a criterion that specifies PAYGROUP is not equal to BIT.</td>
</tr>
<tr>
<td>GREATER THAN,</td>
<td>The Greater Than and Less Than conditionals are useful when working with numeric or date criteria.</td>
</tr>
<tr>
<td>LESS THAN</td>
<td>For example, to find employees hired after September 1, 2000, your criterion could look for a HIRE_DT (hire date) greater than 09-01-2000.</td>
</tr>
<tr>
<td></td>
<td>Likewise, employees hired before September 1, 2000 can be found with a criterion where HIRE_DT is less than 09-01-2000.</td>
</tr>
<tr>
<td></td>
<td>Note that there is no such thing as “Greater/Less Than or equal to.” Keep in mind that if you want to include employees hired ON September 1st, 2000, you would have to use greater than 08-31-00 or less than 09-02-00.</td>
</tr>
</tbody>
</table>
“Like” Condition Type

The **Like** condition retrieves data which matches specified portions of a string. It is similar to using a “wildcard” search in Google or email searches. In FASIS, the “wildcard” character is represented by the percent symbol (%).

In this example, we begin with a basic query of NW_EMPLOYEES that includes Job Title, Job Code, Position Type, and Position Number information. We want to add a criterion to pull record for job titles that begin with “Assoc Director”:

1. In the Criteria tab of your query, click the **Add Criteria** button to begin a new criterion entry:

2. In the **Expression 1** box, use the button to select the JOBTITLE field.

3. Select the **Condition Type** drop-down box and choose “Like”.

4. Enter your search string in the **Constant** box, using the % as a wildcard. Since we want to match all Job Titles that begin with “Assoc Director”, we will enter **Assoc Director%** in the box:

5. Click **OK**.
6. Click the Run tab to run the query and test your results. You can see that all titles beginning with “Assoc Director” within your FASIS security access are produced:

Keep in mind that you can use the % wildcard anywhere in your constant. For example, if we had typed “%Business%” into the Constant box, we would have received all titles that include the word “Business” anywhere in the title.

“In List” Condition Type

The In List condition retrieves data which matches one of a list of constants that you create. As long as the data matches one of the entries in the list, it will be returned in the results.

In this example, we begin with a basic query of the NW_GL_TABLE that provides all general ledger entries for our employees. While the GL includes information about all deductions and taxes, we only want to see an employee’s total earnings and journals entries. Earnings and journals are identified in the NW_GL_TABLE by using the NW_ENTRY_TYPE field: earnings with have an NW_ENTRY_TYPE of “ERN” and journals, “JNL”.

Procedure

1. In the Criteria tab of your query, click the button to begin a new criterion entry:

2. In the Expression 1 box, use the button to select the NW_ENTRY_TYPE field.

3. Select the Condition Type drop-down box and choose “In List”.

4. In the Expression 2 box, click the button to open the Edit List page.
5. Using the Edit List page, enter one value for the list and click Add Value. Do this for each list item you wish to add; in this case we will add ERN and JNL:

![Edit List Image]

6. After you add the first value, a List Members box will pop up; it will update every time you add a value to the list:

![List Members Image]

After adding all values, click OK.

*Note: If you want to remove a value from the list, click the checkbox next to it and press the “Delete Checked Values” button.*

7. The Expression 2 box will show all the list values you have added:

![Expression 2 Image]

Click OK to save the criteria.

---

**“Is Null” Condition Type**

The Is Null will match fields that are completely blank, i.e. where no data exists. It is important to note that “null” is not the same as a zero or a space.

In FASIS, position funding can have an Indefinite End Date. When funding has an Indefinite End, it is stored as “null” in the NW_DIST_STOP_DT field; otherwise, the stop date is stored. In this example, we have a query that displays position information and funding information using the POSITION_DATA and NW_POSN_DIST records. We want to see only position funding that has an Indefinite End Date, so we will set a criteria to check for a NW_DIST_STOP_DT of null.
Procedure

1. In the Criteria tab of your query, click the **Add Criteria** button to begin a new criterion entry:

   ![Add Criteria Button]

2. In the **Expression 1** box, use the **button to select the NW_DIST_STOP_DT field from the NW_POSN_DIST table.

3. Select the **Condition Type** drop-down box and choose “Is null”.

4. After selecting “is null”, the **Expression 2** box disappears. There is nothing more you need to enter when using the “is null” condition:

   ![Expression 2 Disappearance]

5. Click **OK** to save the criteria.

“Between” Condition Type

The **Between** condition allows users to find data that falls in between two specified values. This is particularly useful when searching for a range of dates or a range of numbers, such as Department IDs.

In this example, we are using a query that pulls basic department information from the DEPT_TBL record. However, we only want to see the departments that are between 044500 and 044599.
# Procedure

1. In the Criteria tab of your query, click the **Add Criteria** button to begin a new criterion entry:

![Edit Criteria Properties](image1)

2. In the **Expression 1** box, use the **button to select the DEPTID field.

3. Select the **Condition Type** drop-down box and choose “between”. The **Expression 2** box will update with 2 blank spaces:

![Edit Criteria Properties](image2)
4. Place the first value of the range in **Constant**, and the last value in **Constant 2**:

5. Click **OK** to save the criteria.
**USING LOGICAL OPERATORS AND GROUPING CRITERIA**

**Overview**

This section demonstrates how to change the logical operators and the groupings of your criteria to impact the information that is retrieved.

To illustrate the use of these criteria functions, we will create a query that pulls active positions that have funding established.

**Creating the Initial Query**

We will first create the initial stages of a query that uses POSITION_DATA and NW_POSN_DIST. Steps are described below to create the query, but see the previous sections in this manual for further explanation of these steps.

<table>
<thead>
<tr>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Create a new query and add the POSITION_DATA record.</td>
</tr>
<tr>
<td>2. On the Query tab, select these fields to display in your report:</td>
</tr>
<tr>
<td>3. Return to the Records tab and search for record NW_POSN_DIST. Click “Join Record” and create the join to POSITION_DATA. Accept all of the Auto Join Criteria and click “Add Criteria.”</td>
</tr>
<tr>
<td>4. On the Query tab, select these fields from the NW_POSN_DIST record to display in your report:</td>
</tr>
<tr>
<td>5. View the Criteria tab and notice the Criteria that has been automatically added; we will not change these:</td>
</tr>
</tbody>
</table>

![Criteria Table](image)

**Adding Criteria for Active Positions**

We want to ensure that our report contains information for only active positions. To do so, we have to add a criteria where EFF_STATUS = A. This is FASIS’s notation that the position is Active.

<table>
<thead>
<tr>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. On the Criteria tab, click “Add Criteria.”</td>
</tr>
<tr>
<td>2. In the Expression 1 box, use the magnifying glass to select the EFF_STATUS field on the POSITION_DATA record (record A).</td>
</tr>
<tr>
<td>3. Leave the Condition Type drop down as “equal to.”</td>
</tr>
<tr>
<td>4. In the Expression 2 box, type the letter A. Click OK to save the criteria.</td>
</tr>
</tbody>
</table>
5. In the Criteria tab, your criteria list should now look like this:

![Criteria Table]

Adding Criteria for Currently Funded Positions

The main goal of our report is to find positions that are currently funded. There are two different ways a position would be currently funded:

- The NW_DIST_STOP_DATE (funding stop date) is null, meaning the funding has an Indefinite End, or
- The NW_DIST_STOP_DATE is greater than today, meaning it will stop eventually, but is active today.

In order for our data to be accurate, we must include both of these possibilities. Although there are numerous ways to add criteria (discussed previously), we will add them directly using the Criteria tab for the purposes of this example.

### Procedure

1. On the Criteria tab, click **Add Criteria**.

2. In the **Expression 1** box, use the magnifying glass to select the NW_DIST_STOP_DATE field on the NW_POSN_DIST record (record B):

   ![Edit Criteria Properties]

   - Choose **Expression 1**
     - **Type**: Field
     - **Choose Record and Field**: B.NW_DIST_STOP_DT - Distribution
     - **Condition Type**: equal to

3. We will first add the condition for an Indefinite End funding. For the **Condition Type** drop down, choose “is null”.

4. Click **OK** to save the criteria.
5. We must now add a second criteria to match the funding that does have an end date, but the end date is greater than today.

Click the Add Criteria button again.

6. In the Expression 1 box, use the magnifying glass to again select the NW_DIST_STOP_DATE field on the NW_POSN_DIST record (record B).

7. This time, set the Condition Type to “greater than”:

8. Notice the Expression 2 box is expecting a date. When using a date field in Expression 1, it automatically knows that we will be entering a date in Expression 2.

Enter today’s date in Expression 2 either using the format MM/DD/YYYY or by clicking the calendar icon and choosing the date.

9. Click OK to save the criteria.
Changing the Logical Operators for the Criteria

The logical operators in the criteria list always default to “AND” (notice the criteria list in the previous step). Usually this is what we want, but in this case, it presents a problem. If we leave it as is, the query will only pull positions with funding that has an Indefinite End \textbf{AND} has a date greater than 2001-04-07. This is clearly not what we want, and in fact will produce no results at all!

To get the expected results, we must tell the query that we want funding with an Indefinite End \textbf{OR} a stop date greater than 2011-04-07.

To accomplish this, the logical operators on criteria can always be changed to match what is needed. In this case, we must change the last logical operator to \textbf{OR}.

Procedure

1. Your Criteria tab should now look similar to this:
Using Logical Operators and Grouping Criteria

2. Using the Logical drop-down box on the last line, change it from AND to OR:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Expression</th>
<th>Condition Type</th>
<th>Expression 2</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.EFF_DT - Effective Date</td>
<td>Eff Date &lt;= Current Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AND</td>
<td>A.POSITION_NBR - Position Number</td>
<td>equal to</td>
<td>B.POSITION_NBR - Position Number</td>
<td></td>
</tr>
<tr>
<td>AND</td>
<td>B.BUSINESS_UNIT - Business Unit</td>
<td>equal to</td>
<td>A.BUSINESS_UNIT - Business Unit</td>
<td></td>
</tr>
<tr>
<td>AND</td>
<td>A.EFF_STATUS - Status as of Effective Date</td>
<td>equal to</td>
<td>A</td>
<td></td>
</tr>
<tr>
<td>AND</td>
<td>B.NW_DIST_STOP_DT - Distribution Stop Date</td>
<td>is null</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OR</td>
<td>B.NW_DIST_STOP_DT - Distribution Stop Date</td>
<td>greater than</td>
<td>2011-04-07</td>
<td></td>
</tr>
</tbody>
</table>

3. Now, when reading the criteria list left-to-right and top-to-bottom, it states that results will be found when NW_DIST_STOP_DT is null (indefinite end) OR when NW_DIST_STOP_DT is greater than 2011-04-07.

Grouping Criteria

By default, criteria are applied in the order in which they appear on the Criteria tab. With very complex queries, it is oftentimes useful to group criteria so subsets of the criteria will be run and evaluated together. Grouping criteria can also help queries run more efficiently, producing results more quickly.

For this query, we will group together the last two criteria into one set.

Procedure

1. At the top of the Criteria tab, click the Group Criteria button. You will see a grouping page similar to the following:
2. Notice there are two new columns with empty boxes: Left Paren and Right Paren. Using these boxes, enter left/open parenthesis in the left column and a right/close parenthesis in the right column to create groups.

Remember, the criteria list is read left-to-right and top-to-bottom. If we put an open parenthesis BEFORE the 5\textsuperscript{th} criteria, and a close parenthesis after the last one, we combine them into a group via the parentheses:

![Edit Criteria Grouping Table]

Not only will these two criteria now be processed together, but they will be processed first: when you query runs, anything found in parentheses will be applied first.

3. Don’t forget to save your query after making any changes to your criteria!
Section 6:
Additional Query Topics
USING THE QUERY VIEWER

Overview

Some query users have run-only access and do not have the ability to create or edit queries. These users will not have the “Query Manager” but instead will access and run queries through the Query Viewer.

With the limited functions of the Query Viewer, the user has the option to:

- Search for queries
- Run a query to HTML, Excel, or XML
- Schedule a query
- Add a query to the My Favorite Queries list

Navigating and Searching Using the Query Viewer

Procedure

1. Using the FASIS Main Menu, navigate to: REPORTING TOOLS > QUERY > QUERY VIEWER

2. On the Query tab, select these fields to display in your report:

3. Enter part of or the entire search name in the Search By field:

4. Click Search.

5. In the search results, notice there are no “Edit” links; therefore, the user is not allowed to open or edit the queries. They may be run to HTML, Excel, or XML results by choosing the appropriate link:
USING RUN-TIME PROMPTS

Overview

A Run-Time Prompt allows users to enter a value for a specific field at the time the report is run. When used in conjunction with a Criteria, the report will display only rows of information that match the value entered into the prompt. This method allows a user to create one query for multiple purposes without the need to rewrite the criteria.

This section outlines the practical use of a Prompt and how the prompt looks to a user when the query is executed.

Creating the Prompt

In this example, we begin with a query using NW_EMPLOYEES that displays basic employee information. To make the query more useful, we will create a prompt that allows users to enter a 6-digit Department ID when it is run. The prompt value will be used as a Criteria so that only data that matches that Department ID will be displayed.

<table>
<thead>
<tr>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.</strong> Click on the “Criteria” tab -- we begin by adding the Criteria which will contain the prompt.</td>
</tr>
<tr>
<td><strong>2.</strong> Click the Add Criteria button.</td>
</tr>
<tr>
<td><strong>3.</strong> In the Expression 1 box, click the button and select the A.DEPTID field – this is the field we will be matching the prompt entry to:</td>
</tr>
</tbody>
</table>

![Prompt Configuration Diagram]

In the image, the user can select the field A.DEPTID, set the condition type to equal to, and then enter the specific Department ID value.
4. In the Choose Expression 2 Type box, click the “Prompt” radio button. The Expression 2 box will update with Prompt details:

5. In the Expression 2 box, click “New Prompt” to create your prompt. You will see the “Edit Prompt Properties” screen:

6. The Heading Text is the title that will be displayed when the user is asked to enter a value. It will default to the field name, but may be changed to provide more clarity.

If you wish to change the heading text, set the Heading Type dropdown to “text” and enter the header in the Heading Text. In our example, we will change it to:

7. Change the Edit Type to “No Table Edit”; if you do not change this, your prompt will not work correctly.
Using Run-Time Prompts

8. Click **OK**.

   Notice that the **Expression 2** box now contains your prompt name. Prompt names are always identified by a colon and a number; in this case, our new prompt is named “:1”.

   ![Prompt Interface](image)

   *Note: Prompts can also be set up independently from the “Prompt” tab and then added into the Criteria. However, creating the prompt this way will save you an extra step.*

9. Click **OK** to save the criteria.

---

**How the Prompt Appears to a User**

When the above query is run by any user, the prompt is displayed and information must be entered before any results are provided. In this case, the user sees the following request first:

![Prompt Interface](image)

After entering a department ID, the query will run and display only the results that match that department number.
CHUNKING QUERIES

Overview

Occasionally, a query may run very slow or even stop if it is trying to handle too much data at once. If you have a query that typically returns a very large amount of data, chunking the query will help you achieve faster results.

“Chunking” simply refers to breaking one large query into several smaller queries by using criteria. We can then manually copy results from all of the smaller queries into one Excel spreadsheet.

Chunking Example

One common method is to chunk a query based on EmplID. If we have access to a very large number of employees, pulling a list from the NW_EMPLOYEES table may take a long time. To counteract this, we can run the query a couple of times, first pulling employees whose ID numbers are between 1000000 and 1040000, and second pulling employees with IDs between 1040001 and 1080000.

In this example, we will work with an existing query that provides employee details from NW_EMPLOYEES. We will add a new criterion to assist in the chunking effort.

<table>
<thead>
<tr>
<th>Procedure</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Click either the “Query” or “Fields” tab and click the button next to the EMPLID field – this will create a new Criterion for the EmplID.</td>
</tr>
<tr>
<td>2. Click the button.</td>
</tr>
<tr>
<td>3. For the first “chunk,” we want to pull employees with an ID number between 1000000 and 1040000. We will set the Condition Type to “between” and enter the constants accordingly:</td>
</tr>
<tr>
<td>4. Click to save the criteria.</td>
</tr>
</tbody>
</table>
5. **Click the “Run” tab and download your query results into an Excel or CSV file.**

6. **We now have our first “chunk” of data. To get the second piece, go to the “Criteria” tab, find the criteria we just created, and click the **Edit** button to change it:**

   ![Criteria table](image)

   **In the Expression 2 box of the criteria, update the constants to the new “chunk” – 1040001 and 1080000:**

   ![Expression 2](image)

8. **Click **OK** to save the criteria.**

9. **Click the “Run” tab and download your query results into an Excel or CSV file.**

   Although the new results will open in another Excel or CSV file, you can simply select and copy the data into the first Excel file to create your complete results.
Section 7:
Appendices and Reference Information
## A. COMMON FASIS FIELDS AND DEFINITIONS

<table>
<thead>
<tr>
<th>Fields and Definitions</th>
<th>FASIS Field Name</th>
<th>Found in Tables</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>BENEFITS PROGRAM</strong></td>
<td>BENEFIT_PROGRAM</td>
<td>NW_EMPLOYEES</td>
<td>Identifies the types of benefits the individual is eligible to receive. This field is used to determine an employee’s benefits eligibility in the Benefits Administration process. It is important to note that all benefit programs are recorded on Job Record zero with the exception of NFT which is recorded on Job Record 1.</td>
</tr>
</tbody>
</table>
| **DEPARTMENT CODE**    | DEPTID           | NW_EMPLOYEES, JOB, DEPT_TBL, POSITION_DATA, NW_POSN_DIST, all NW_GL tables | The department code is a 6-digit number that identifies the department where the person is located. The first 4 digits determine the designated area, while the 2 digits at the end identify the types of employees designated to that department. For example:  
  - XXXX99 – Graduate students being paid from that Department  
  - XXXX98 – Work Study students being paid from that Department  
  - XXXX97 – Professor Emeritus  
  - XXXX96 – Officers in the University  
  - XXXX95 – The NMFF Common Paymaster People  
  - XXXX92 – The Medical School Faculty being paid from VA  
  - XXXX05  
  - XXXX06  
  - XXXX07 – Shared Departments for the Medical School  
  - XXXX08  
  - XXXX09  
  - XXXX10 (and continuing upward)...  
  - XXXX91  
  - XXXX90 – Shared Departments for NMFF  
  - XXXX89 (and continuing downward)... |
### PAYROLL STATUS

**FASIS Field Name:** EMPL_STATUS  
**Found in Tables:** NW_EMPLOYEES, JOB

**Description:**  
Describes an employee’s payroll status in these terms:

- “A” (Active) – employees currently targeted to be paid in FASIS. For monthly staff faculty and graduate students, this means they have received payment in the last month. For Temporary (Paygroup BIT) and Bi-weekly Employees (Paygroup BIR), it does not guarantee that the person has been paid, only that the person will, potentially, receive a check in the future.

- “T” (Terminated) – the employee has been terminated for this particular job. There is no indicator that a person has been terminated from all jobs; this code is based on each job record number for a particular individual.

- “L” (Unpaid Leave) – the employee is on an unpaid Leave of Absence for a particular job.

- “P” (Paid Leave) – the employee is on a paid Leave of Absence for this job.

### APPOINTMENT END DATE

**FASIS Field Name:** NW_APPT_END_DT  
**Found in Tables:** NW_EMPLOYEES, JOB

**Description:**  
This field is used for Appointments (Jobs) that are to be renewed through the reappointment process or if a department was funded with a position for a limited amount of funding for this job. Appointments supported by Grants should reflect when the appointment is ending, which should correspond with the Funding Stop Date.

### POSITION END DATE

**FASIS Field Name:** NW_POSN_END_DT  
**Found in Tables:** POSITION_DATA, NW_POSN_DIST

**Description:**  
This field identifies how long the position will be available in a given department. For staff positions the end date should be indefinite, unless there was a limitation by Budget Operations for the position to be available for a certain number of years. The same would apply to research positions that are being funded by a research grant. The end date of the position should equal the end date of the funding source.

### LOCATION CODE

**FASIS Field Name:** LOCATION  
**Found in Tables:** NW_EMPLOYEES, LOCATION_TBL, DEPT_TBL, JOB, POSITION_DATA, POSN_VACANT

**Description:**  
This code describes where a position is physically located at the University.
<table>
<thead>
<tr>
<th>NAME</th>
<th>FASIS Field Name: NAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Found in Tables:</td>
<td>NW_EMPLOYEES, PERSONAL_DATA, PERSON_NAME, NW_LABEL</td>
</tr>
<tr>
<td>Description:</td>
<td>This field reflects an individual’s legal name that is listed on their Social Security Card. This is the name used for the NU Online Directory and any official business conducted through the University, including W-2 prints.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ORIGINAL HIRE DATE</th>
<th>FASIS Field Name: HIRE_DT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Found in Tables:</td>
<td>NW_EMPLOYEES</td>
</tr>
<tr>
<td>Description:</td>
<td>This is the date that the person was originally (first) hired at the University. This could reflect a hiring to a temporary or regular position.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PAY GROUP</th>
<th>FASIS Field Name: PAYGROUP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Found in Tables:</td>
<td>NW_EMPLOYEES, JOB, all NW_GL tables</td>
</tr>
<tr>
<td>Description:</td>
<td>Uses to select individuals who have common features in including pay period end dates (monthly or biweekly), salary type (hourly or salaried), etc. The current active Pay Groups are:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Group</th>
<th>Descr</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>BIR</td>
<td>Biweekly Regular</td>
<td>A</td>
</tr>
<tr>
<td>BIT</td>
<td>Biweekly temporaries</td>
<td>A</td>
</tr>
<tr>
<td>IND</td>
<td>Independent Contractors</td>
<td>A</td>
</tr>
<tr>
<td>LTD</td>
<td>Long Term Disability</td>
<td>A</td>
</tr>
<tr>
<td>MGW</td>
<td>Monthly Graduate Wages</td>
<td>A</td>
</tr>
<tr>
<td>MOF</td>
<td>Monthly Faculty</td>
<td>A</td>
</tr>
<tr>
<td>MON</td>
<td>Monthly Staff</td>
<td>A</td>
</tr>
<tr>
<td>NMF</td>
<td>Monthly NMFF</td>
<td>A</td>
</tr>
<tr>
<td>OTH</td>
<td>Other</td>
<td>A</td>
</tr>
</tbody>
</table>
## B. Commonly Used FASIS Records

### Non-GL Records:

<table>
<thead>
<tr>
<th>Table</th>
<th>Use When Looking For:</th>
<th>Sample Fields/Information</th>
<th>Tips</th>
</tr>
</thead>
</table>
| NW_EMPLOYEES   | Active or leave employees only. Does not include any historical or future information, or any terminated employees. | Name, Home Address, Position Type and Category, Appointment End Date, Pay Group, Department Number and Name, Compensation information, Benefits information | - This is a commonly used table for most employee-related queries  
- This table is effective-dated  
- Includes the most current job information for every active or leave employment record for each employee. |
| NW_LABEL       | Active or leave employees’ preferences for mail delivery.                            | Work location address (note: some employees have the option to have their mail sent to their home or off-campus address). | Do not use this record by itself; always join it with a record in which you’ve established criteria. For example, join NW_EMPLOYEES with this record if you are doing a mailing to some/all employees in your department(s). Establish criteria using NW_EMPLOYEES fields such as DEPTID, NW_POSN_TYPE, PAYGROUP, etc. |
| JOBCODE_TBL    | Information about Job Codes.                                                         | Job Title (field name is DESCR), default payroll account code, Salary Plan and Grade, Standard Hours | This table is effective-dated  
Join to this record when you need a Job Title (field DESCR) |
| POSITION_DATA  | Information about active or inactive positions. Note that no funding is included in this record. | Position title (DESCR), Department ID, Pay Group, Position Type and Category, Location Code, Benefits Eligibility, Tenure Track Indicator, Position End Date | This table is effective-dated  
Join NW_POSN_DIST with this record to include position funding information  
To specify only active positions, use a criterion of EFF_STATUS = A |
<table>
<thead>
<tr>
<th>Record Name</th>
<th>Use When Looking For</th>
<th>Sample Fields/Information</th>
<th>Tips</th>
</tr>
</thead>
</table>
| NW_POSN_DIST | Funding information for active and inactive positions. This record does not include department, location, pay group, or other position information. | Chartstring information, funding Percentage, Funding Start Date, Funding Stop Date, Indefinite Stop Date | - Join POSITION_DATA with this record to create a list of positions and their funding.  
- This record is not effective-dated. When you wish to see only current funding, use two criteria: NW_DIST_STOP_DT is null or NW_DIST_STOP_DT is greater than Current Date. |
| JOB | Current, historical, and future job/appointment information for active, leave, or terminated employees. | Position Number, Job Code, Pay Group, Appointment End Date, Department, Compensation information | - This record is effective-dated  
- JOB is a huge record. When using this, expect your query to run longer and slower than usual.  
- Use this record when you either need historical information or information on terminated employees. |
| PERSONAL_DATA | Demographic information for any current, leave, or terminated employee. | Name, Home Address, Gender, Phone Number | - Join this record to NW_EMPLOYEES to include demographic information |
| DEPT_TBL | Information about departments, as related to the HR Department ID number. | HR Department Number, Department Name (field is DESCR), Admin Unit, Position Number for the department manager | - This record is effect-dated  
- Join this record to your query to include department names (DESCR field) |
| LOCATION_TBL | Information about locations as identified by the Location Code in FASIS. | Building and street address for each NU Location Code. | - This record is effect-dated  
- Use this by itself to develop a list of all locations for your department number(s)  
- Join this record when you need a location name (DESCR field) |
### GL Records:

<table>
<thead>
<tr>
<th>Record</th>
<th>System</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NW_GL_ACCOUNT</td>
<td>NUFin</td>
<td>All of the accounts that can be used in funding an employee. This also includes if the Account should be encumbered; the federal and non-federal benefit rates; the benefit account to use; if this is work study account; and the category that this account belongs to.</td>
</tr>
<tr>
<td>NW_GL_ACCTNG_VW</td>
<td>NUFin</td>
<td>This is the view used by NUFin Reporting for drill thru reporting.</td>
</tr>
<tr>
<td>NW_GL_DATA</td>
<td>NUFin</td>
<td>This is the data reported on the PEDs. This includes payroll expense, journals, encumbrances, and fiscal year-to-date. This data is month-to-date. Encumbrances and fiscal year-to-date are as of the last check date. <strong>This table has only the current month on it, if this is March you will not see February data on this table.</strong></td>
</tr>
<tr>
<td>NW_GL_DATA_HIST</td>
<td>NUFin</td>
<td>This is the data reported on the PEDs for each check date. This includes payroll expense, journals, encumbrances, and fiscal year-to-date. This data has been accumulating since December 2008.</td>
</tr>
<tr>
<td>NW_GL_HIST</td>
<td>CUFS</td>
<td>This is the historical CUFS data from 9/13/1996 to 11/26/2008</td>
</tr>
<tr>
<td>NW_GL_SUSP_ERRS</td>
<td>NUFin</td>
<td>The suspense errors from the last GL Interface run.</td>
</tr>
<tr>
<td>NW_GL_TABLE</td>
<td>NUFin</td>
<td>This is the NUFin GL Interface data. The data from 9/1/2008 thru 11/26/2008 is converted CUFS data.</td>
</tr>
<tr>
<td>NW_GL_TABLE1997</td>
<td>CUFS</td>
<td>This is the data from NW_GL_HIST where the fiscal year is 1997</td>
</tr>
<tr>
<td>NW_GL_TABLE1998</td>
<td>CUFS</td>
<td>This is the data from NW_GL_HIST where the fiscal year is 1998</td>
</tr>
<tr>
<td>NW_GL_TABLE1999</td>
<td>CUFS</td>
<td>This is the data from NW_GL_HIST where the fiscal year is 1999</td>
</tr>
<tr>
<td>NW_GL_TABLE2000</td>
<td>CUFS</td>
<td>This is the data from NW_GL_HIST where the fiscal year is 2000</td>
</tr>
<tr>
<td>NW_GL_TABLE2001</td>
<td>CUFS</td>
<td>This is the data from NW_GL_HIST where the fiscal year is 2001</td>
</tr>
<tr>
<td>NW_GL_TABLE2002</td>
<td>CUFS</td>
<td>This is the data from NW_GL_HIST where the fiscal year is 2002</td>
</tr>
<tr>
<td>NW_GL_TABLE2003</td>
<td>CUFS</td>
<td>This is the data from NW_GL_HIST where the fiscal year is 2003</td>
</tr>
<tr>
<td>NW_GL_TABLE2004</td>
<td>CUFS</td>
<td>This is the data from NW_GL_HIST where the fiscal year is 2004</td>
</tr>
<tr>
<td>NW_GL_TABLE2005</td>
<td>CUFS</td>
<td>This is the data from NW_GL_HIST where the fiscal year is 2005</td>
</tr>
<tr>
<td>NW_GL_TABLE2006</td>
<td>CUFS</td>
<td>This is the data from NW_GL_HIST where the fiscal year is 2006</td>
</tr>
<tr>
<td>NW_GL_TABLE2007</td>
<td>CUFS</td>
<td>This is the data from NW_GL_HIST where the fiscal year is 2007</td>
</tr>
<tr>
<td>NW_GL_TABLE2008</td>
<td>CUFS</td>
<td>This is the data from NW_GL_HIST where the fiscal year is 2008</td>
</tr>
<tr>
<td>NW_GL_TABLE2009</td>
<td>CUFS</td>
<td>This is the data from NW_GL_HIST where the fiscal year is 2009</td>
</tr>
<tr>
<td>GL_ACCOUNT_TBL</td>
<td>NUFin</td>
<td>This table is messaged from NUFin and is all valid accounts and their descriptions.</td>
</tr>
</tbody>
</table>
C. KEY RECORD QUICK LIST

The following Employee and Funding tables are the most common used for basic querying. Not all users will have access to all tables listed here; access is based on each user’s FASIS security profile.

<table>
<thead>
<tr>
<th>Basic Employee-Related Tables</th>
</tr>
</thead>
<tbody>
<tr>
<td>EMPLOYEES</td>
</tr>
<tr>
<td>NW_EMPLOYEES</td>
</tr>
<tr>
<td>PERSONAL_DATA</td>
</tr>
<tr>
<td>PER_ORG_ASGN</td>
</tr>
<tr>
<td>EMPLOYMENT</td>
</tr>
<tr>
<td>JOB</td>
</tr>
<tr>
<td>PERSON_NAME</td>
</tr>
<tr>
<td>EMAIL_ADDRESS</td>
</tr>
<tr>
<td>NW_EMAIL_ADDR</td>
</tr>
<tr>
<td>EMERGENCY_CNTCT</td>
</tr>
<tr>
<td>NW_REPORTS_TO</td>
</tr>
<tr>
<td>NW_LABEL</td>
</tr>
<tr>
<td>NW_EMPL_TENURE</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Basic Funding and Ledger Tables</th>
</tr>
</thead>
<tbody>
<tr>
<td>POSITION_DATA</td>
</tr>
<tr>
<td>POSN_VACANT</td>
</tr>
<tr>
<td>NW_POSN_DIST</td>
</tr>
<tr>
<td>NW_EMPL_DIST</td>
</tr>
<tr>
<td>NW_GL_TABLE</td>
</tr>
<tr>
<td>NW_CUR_ENCB_TBL</td>
</tr>
<tr>
<td>NW_FN_DEPT_TBL</td>
</tr>
<tr>
<td>PROJECT</td>
</tr>
<tr>
<td>PROJ_ACTIVITY</td>
</tr>
</tbody>
</table>
D. COMMON QUERY CRITERIA “HOW TO”

Overview
This section provides details for criteria that can be set up to create common results in your report output.

How To Pull Part-Time or Full-Time Employees
To determine if an employee is part-time or full-time, the NW_TOTAL_FTE field on NW_EMPLOYEES is used. This field combines all of an employee’s active appointments to show whether they are considered full- or part-time across the University.

<table>
<thead>
<tr>
<th>Record</th>
<th>Field</th>
<th>Criteria</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>NW_EMPLOYEES</td>
<td>NW_TOTAL_FTE</td>
<td>NW_TOTAL_FTE is equal to 1.0</td>
<td>Pulls Full-Time Employees only.</td>
</tr>
<tr>
<td>NW_EMPLOYEES</td>
<td>NW_TOTAL_FTE</td>
<td>NW_TOTAL_FTE is less than 1.0</td>
<td>Pulls Part-Time Employees only.</td>
</tr>
</tbody>
</table>

How To Pull Positions That Have Current Funding
To determine if a position is currently funded, the NW_DIST_STOP_DT on NW_POSN_DIST is used. If NW_DIST_STOP_DT is null, the position is funded indefinitely. If it is a date greater than the current date, it is still being funded but will stop in the future.

<table>
<thead>
<tr>
<th>Record</th>
<th>Field</th>
<th>Criteria</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>POSITION_DATA and NW_POSN_DIST</td>
<td>NW_DIST_STOP_DT</td>
<td>NW_DIST_STOP_DT is null OR NW_DIST_STOP_DT is greater than “today’s date”</td>
<td>Pulls all currently funded positions.</td>
</tr>
</tbody>
</table>

Remember to change the logical operator to “OR” on the second criteria, as discussed earlier in this manual.

How To Pull Active Employees with Current Funding
Build on the query above by joining the NW_EMPLOYEES record. This will ensure only active employees with funding are returned.

To pull only faculty or staff, join NW_EMPLOYEES record to the query above. Then add one of the following criteria:

<table>
<thead>
<tr>
<th>Record</th>
<th>Field</th>
<th>Criteria</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>NW_EMPLOYEES</td>
<td>NW_POSN_TYPE</td>
<td>NW_POSN_TYPE equal to STF</td>
<td>Pulls all active staff employees with current funding.</td>
</tr>
<tr>
<td>NW_EMPLOYEES</td>
<td>NW_POSN_TYPE</td>
<td>NW_POSN_TYPE equal to FAC</td>
<td>Pulls all active faculty employees with current funding.</td>
</tr>
</tbody>
</table>