CHRIS User Guide - Retrieving Records

Introduction

There are a number of different ways to retrieve and view data in CHRIS. The search capabilities allow you too quickly and easily:

- Display a specific record or group of records you need to work with.
- Look up information online, for example, to respond to an inquiry.
- Find and enter values into specific data fields.

You can search for information without having to use complex query language. You can search by a single letter, word, group of characters, or just about anything else. And, you can find out how much information is available that matches your criteria <u>before</u> running the search to save computer time and your time if the search would yield too big a response (this feature is available only when using *Query-by-Example)*.

Guide Contents

Glossary

| Terms and Definitions	
Query	Query is used interchangeably with *search* to describe the retrieval of records or data.
Query Find	Query Find displays a window in which you can specify search criteria (to limit the length of the search results) or retrieve all records.
Wildcard Characters	Wildcard Characters are symbols that can be used to refine your search for records. They represent characters or groups of characters.
Query-by-Example	Query-by-Example is a method to retrieve a group of records based on more sophisticated search criteria than that used with Query Find.
Query Operators	Query Operators are symbols that can be used to refine your search for records; they provide parameters for field data that must be met in order for the record to be part of those retrieved.
Query Count	Query Count to find out how many records match your search criteria, without retrieving the records.
Status Line	Status Line displays a count of the number of records currently displayed in the block.

MAIN MENU BAR

View Menu

The **View** menu is used to show the navigator, retrieve records, and manage requests. For the purposes of this guide, we will focus on those items pertaining to retrieving records.
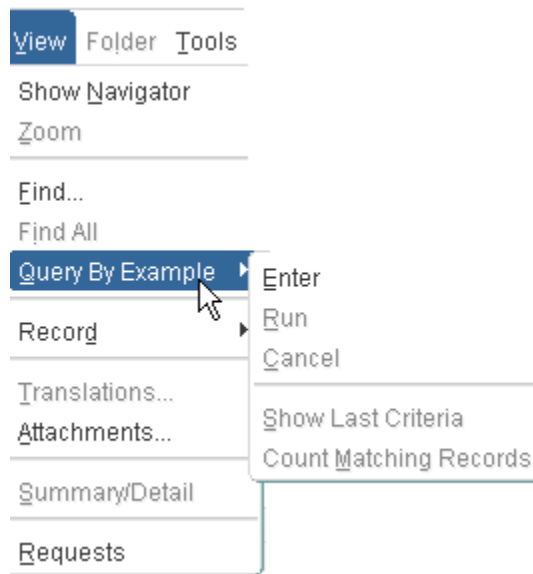
Note: The View Menu Changes depending on the Window you are in. The view menu discussed in this guide is accessible from the Main Menu Bar of the **People** Form.
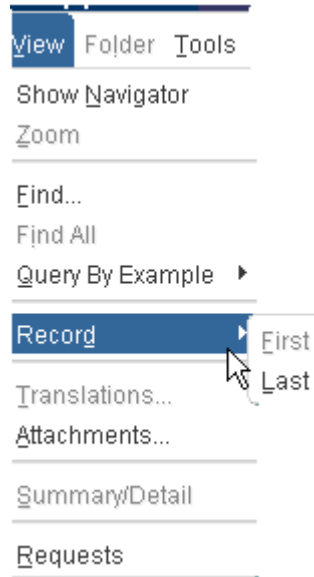
To access the View menu:

- Click **View** on the Main Menu Bar. Sub-menus include: Query By Example and Record.
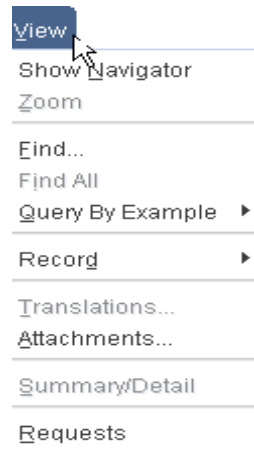
- Query By Example

- Record

View Menu Items

Below are the items listed in the **View** menu that is specific to querying and retrieving data. Keyboard shortcuts can be used to perform some functions.

Click:	**Find…**
To:	Display the **Find** Window to retrieve records.
Available Icon:	Flashlight
Shortcut:	N/A

Click:	**Find All**
To:	Retrieve all records.
Available Icon:	N/A
Shortcut:	N/A

Click:	**Query by Example**
To:	Enter and Run Queries
Available Icon:	N/A
Shortcut:	N/A

Click:	**Enter**
To:	Invoke the Enter Query mode to enter search criteria for a Query-by-Example search.
Available Icon:	N/A
Shortcut:	[F11]

Click:	**Run**
To:	Execute a Query-by-Example search.
Available Icon:	N/A
Shortcut:	[Ctrl] + [F11]

Click:	**Cancel**
To:	Cancel the Query-by-Example search by exiting from the Enter Query mode.
Available Icon:	N/A
Shortcut:	[F4]

Click:	**Show Last Criteria**
To:	Recover the search criteria used in the previous Query-by-Example search.
Available Icon:	N/A
Shortcut:	N/A

Click:	**Count Matching Records**
To:	Count the number of records that would be retrieved if you ran the current Query-by-Example search.
Available Icon:	N/A
Shortcut:	[F12]

People → CHRIS Enter and Maintain

Step 1

Click *People → CHRIS Enter and Maintain.* The Find Person window will display.

Note: In some cases, a **Find** Window will display automatically for blocks that have many records. This is the case when you click *People → CHRIS Enter and Maintain* from the **Navigation List**.
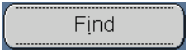
Step 2

Enter your search criteria in one or more data fields. If you do not know the exact value for a data field you wish to search on, or want to retrieve multiple records with similar but not exact match criteria, you can use the percent sign (%) wildcard character.

To search using the wildcard character, type a percent sign (%) before and/or after typing a word or string of characters you know are in the search criteria.

Note: In some **Find** Windows, the search criteria you enter are case sensitive. If your search is not successful, try using another case; e.g., mixed case instead of upper case.

Step 3

Click the [Find] (Find) button to execute the search.

Or

Click the [Clear] (Clear) button to clear the current search criteria so you can enter new search criteria.

Step 4

To add or enter a new record, click the [New] (New) button

The simplest way to query (search) for records in *People → CHRIS Enter and*

Maintain is to click the Flashlight which opens the Find Person window.

Note: If a **Find** Window has any check boxes, click the checkbox if you wish to change the selection status of the option.

■Query Only Open Notifications

Check boxes in **Find** Windows have two modes:

- **Checked**: Records that meet this parameter will be retrieved by the query.

- **Unchecked**: Only records that <u>do not</u> meet this parameter will be retrieved by the query.

<u>**Using Query Find:**</u>

If you want to query for records in your current block or window, you can:

Click **View → Find All** from the Main Menu Bar to retrieve <u>all</u> records (if there are a lot of records, you may want to avoid this).

Or

Follow the steps outlined below to limit your search to certain records.

Query-by-Example & Query Count

Purpose

Query-by-Example is a method to retrieve a group of records based on more sophisticated search criteria than that used with Query Find. Like Query Find, the search criteria can include specific values or phrases containing wildcard characters. In addition, however, you can use *Query Operators* to refine your search.

If you do not want to actually retrieve the records from a Query-by-Example search, but just want to know how many records match your search criteria, you can perform a *Query Count.*

Query Operators

Below is a table of Query Operator symbols and their meanings, as well as examples of their use.

Notes:
- When using query operators, if your data field contains character or date values, you must enclose the character or date value in single quotes as shown in the example expressions.
- You cannot use query operators on time data fields.

Operator Symbol	=
Meaning	Equal to
Example Expressions	= 'William' = 112

Operator Symbol	!=
Meaning	Not equal to (Is not)
Example Expressions	!= 'William' != 112

Operator Symbol	>
Meaning	Greater than
Example Expressions	>89.1 > '01-JAN-01'

Operator Symbol	>=
Meaning	Greater than or equal to (At least)
Example Expressions	>= 56

Operator Symbol	<
Meaning	Less than
Example Expressions	< 2000.00

Operator Symbol   <=

| **Meaning**	Less than or equal to (At most)
Example Expressions	<= 200

Operator Symbol	#BETWEEN
Meaning	Between (and including) two values
Example Expressions	#BETWEEN 1 and 100

Running a Query-by-Example

Follow the steps below to perform a search for data using the Query-by-Example method.

Step 1

Click **View → Query By Example → Enter** from the Main Menu Bar.   The Message Line will indicate you are in the Enter Query mode. (Or use F11)
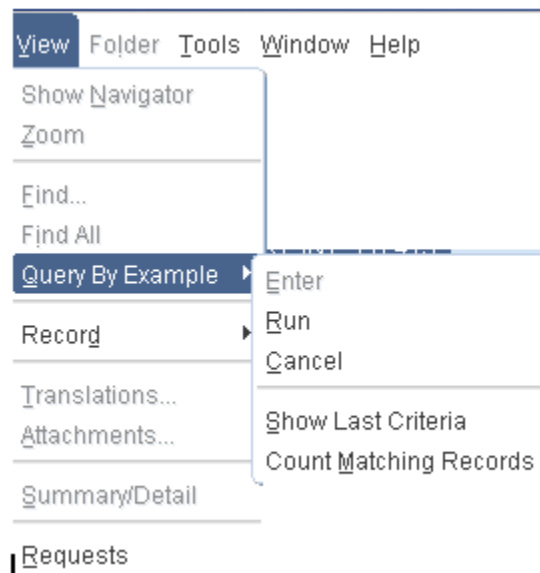
Enter a query; press Ctrl+F11 to execute, F4 to cancel.

Note: The View Menu Changes depending on the Window you are in. The view menu discussed here is accessible from the Main Menu Bar of the **Process Log (Federal)** Form.

Step 2

Enter your search criteria in any of the data fields, using wildcard characters and/or query operators as necessary.

Notes:

- To retrieve all database records for a block, do not enter search criteria – go directly to the next step.

- You can click **View → Query By Example → Show Last Criteria** from the Main Menu Bar to display the search criteria used in your last search, if there was one.
- If a check box appears in your query, in Enter Query mode, all check boxes are in a null state; although they may appear checked or not checked as a default. If you want your search criteria to include information in the check box, you must select it. Similarly, if you want your search criteria to include information not in that check box, you must ensure it is not checked.

Step 3
Click **View → Query By Example → Enter → Run** from the Main Menu Bar to execute the search. (Or use [Ctrl] + F11)
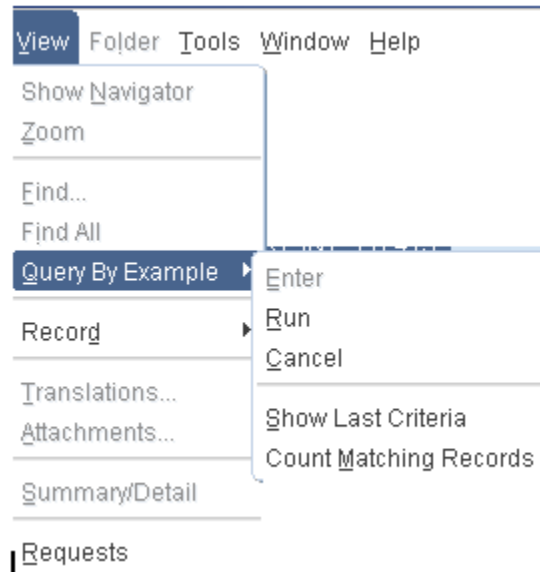
Step 4

Click **View → Query By Example → Cancel** from the Main Menu Bar to cancel from the Enter Query mode or click [F4].
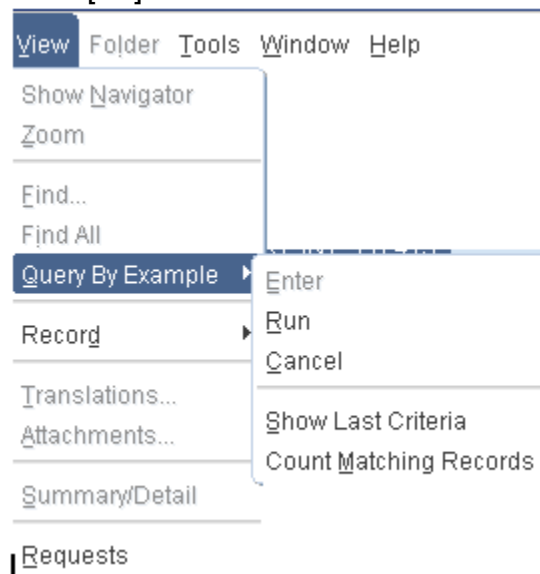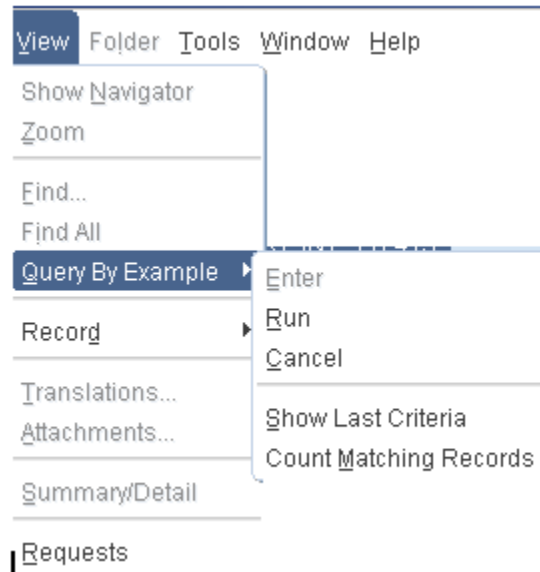

Displaying a Query Count

Follow the steps below to find out how many records match your search criteria, without retrieving the records.
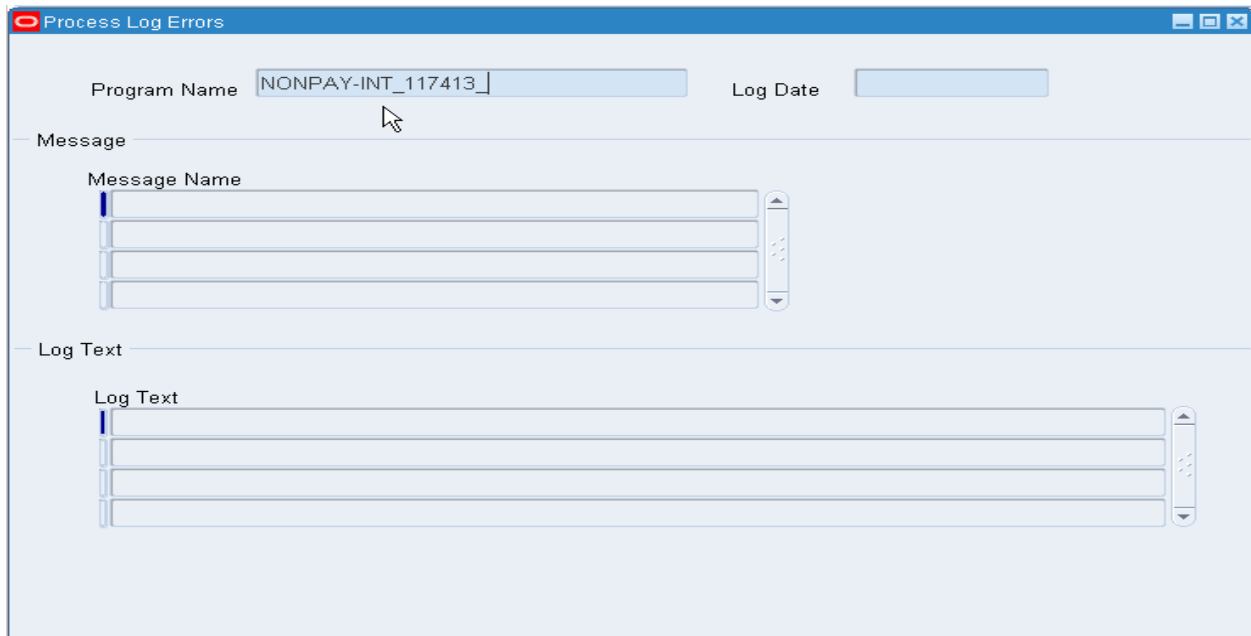
Step 1

Click **View → Query By Example → Enter** from the Main Menu Bar. The message line will indicate you are in the Enter Query mode. (Or use F11.)
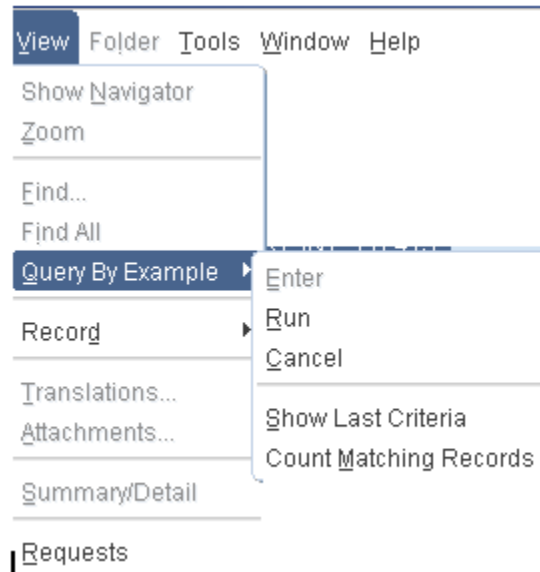
Step 2

Enter your search criteria in any of the data fields, using wildcard characters and/or query operators as necessary (see notes in step 2 of *How to Run a Query by Example*).
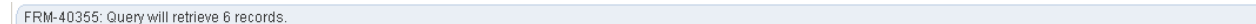

Step 3

Click **View → Query By Example → Count Matching Records** from the Main Menu Bar to display the number of records that a Query-by-Example search would retrieve. (Or use F12)

The Message Line will display the record count:

FRM-40355: Query will retrieve 6 records.

Note: If you simply click **View → Query By Example → Count Matching Records** without specifying any search criteria in the block, then the query count will display the total number of records in the database for that block.

Step 4

If you now want to run the query to retrieve the matching records, click **View → Query By Example → Run** from the Main Menu Bar to execute the search. (Or use [Ctrl] + F11).
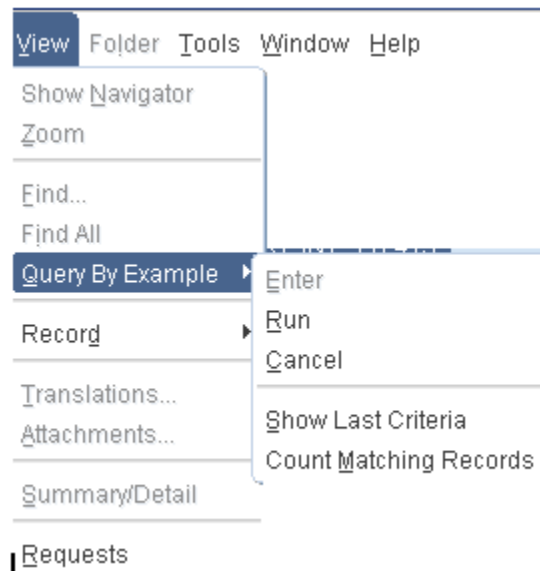
Step 5
Click **View → Query By Example → Cancel** from the Main Menu Bar to cancel from the Enter Query mode. (Or use [F4].

REVIEWING RETRIEVED RECORDS

Purpose

After you perform a search to retrieve records, you will need to navigate between the records that have been retrieved.

Status Line Display

The status line displays a count of the number of records currently displayed in the block if there are multiple records, i.e. Record 2 of 8.

Displaying Retrieved Records

- If you are in a multi-record block, you can use the scroll bar to view additional records not currently visible.

- If you are in a block that only displays one record at a time, you can use your keyboard or the **View** menu to move between records (see table below).

Note: Each time you display another retrieved record, the current record count in the status line increases.

To display	Next record Press Down Arrow **[↓]** *Or* **[Page Down]** on your keyboard
To display	Previous record Press Up Arrow **[↑]** *Or* **[Page Up]** on your keyboard
To display	First record Click **View → Record → First Record**
To display	Last record Click **View → Record → Last Record**

Note: You may receive decision box if the system indicates there is an unknown number of additional records. You will have the opportunity to continue, stop or continue to End.
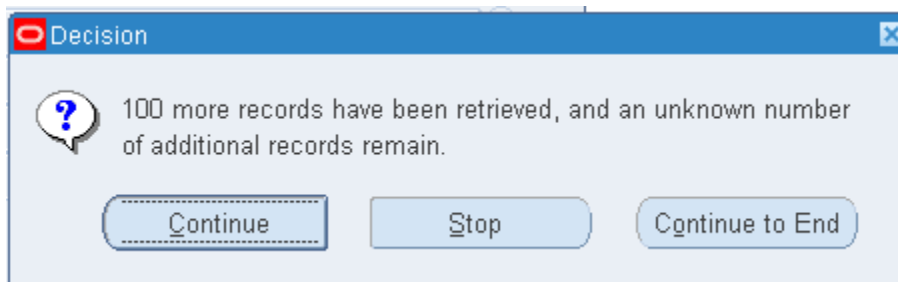
SEARCH RECORDS (WORKFLOW INBOX)

Simple / Advance Search

Simple Search – Search is limited to data fields as displayed in "Simple Search" screen (Subject, From and Sent).

Example to search for "Details" in workflow, enter "Percent", "Detail" "Percent" and Click "Go"

Note: Search is case insensitive.

Advanced Search – Search using "Advanced Search" covers the following search criteria: Subject, From, Message Attribute and Sent as displayed

In addition to search criteria displayed, there are additional search criteria which can be added for a more extensive search. This additional search criterion includes: Closed, Due, From Me, FYI, Information Requested From, Message Name, Notification ID, Priority, Response Required, Status, To, Type and Type Internal Name.
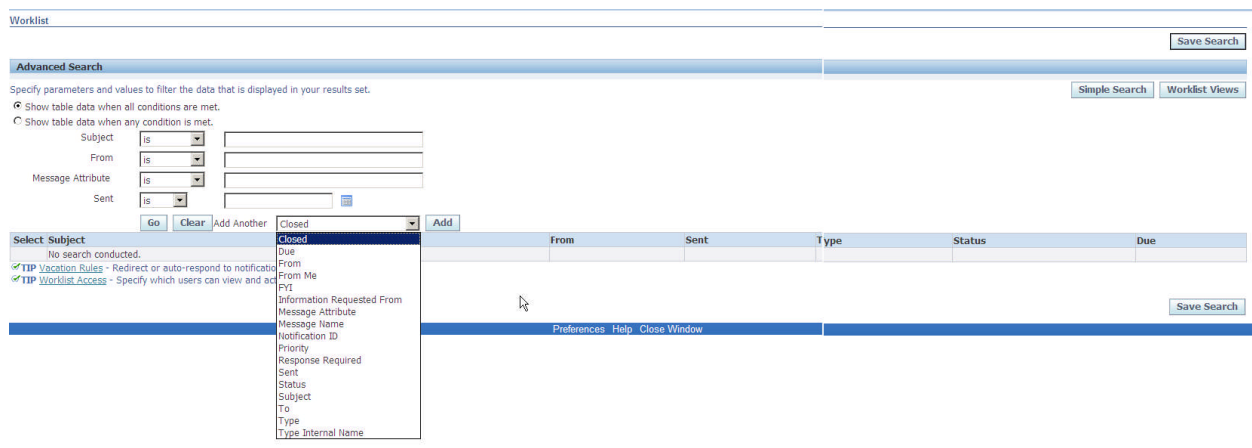
Wildcard Characters

Wildcard Characters are symbols that can be used to refine your search for records. They represent characters or groups of characters. Below are the two-wildcard characters you can use and their meanings. The percent sign (%) may be most useful to you.

Wildcard Character	**%** (Percentage sign)
Meaning	Represents any character or group of characters (including no characters).
Example	%SPE% can represent Telecommunications Specialist, Computer Specialist, Contract Specialist, and so on.

Wildcard Character	_ (Underscore line)
Meaning	Represents any single character.
Example	Product_ can represent ProductA, Product1, and so on.

Example: If you want to retrieve all records that contain the word "Product" with one additional number/letter, you would enter the search criterion "Product_" in that data field.