How to Define, Save and Manage Reports in the New User Experience in Workforce Ready

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Information

Article Number
000068724
Goal

- How do I filter on columns?
- How do I sort on columns?
- How to I group on columns?
- How do I add/remove columns?
- How do I save views?
- How do I expand the rows on a page?

Environment

- Workforce Ready

Answer

Utilizing Reports

In this article you will be find how to do the following things within a report:

Note Click on any item in the below menu to navigate to this area of the article

- Global Filters
    - Select Dates (for reports that allow date selection)
    - Filter Employees
    - Add/Remove Columns
    - Changes the Rows on a Page
- Column Filters
    - Filter Definitions
    - Single Column Filter
    - Group/Ungroup Columns
    - Sort Columns
    - Column Settings
- Save Reports
- Managing Report Views

Defining Report Settings

Select the report you want to run from the menu. Under the Team Icon you will see the option to open menus further by Module. Once you select a module (Ex: HR) another menu opens and you will see "Reports". From this area you can select the report you are wanting to work with.
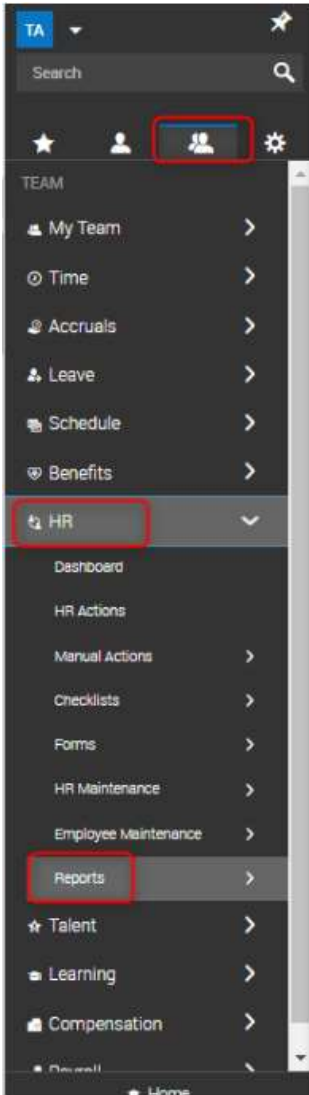
When you select the report, a page will launch for the report, where you can choose the data to be included in the report. At the top right of each report is a filter that will control who is included in the report, dates and time periods for the data to be included in the report, and various other options. Below are descriptions of these options.

Global Filters

When you click on the Filter icon from the report you have two filters to choose from: Global or Columns. By default, you will always open up to the Global Filters. The global filter will allow you to select the Date Range for the data on your report as well as filter for the employees you want to see on the report.

Selecting Dates for the Report

Date Range

There are many options to include data from the past, present and future. You can also choose time periods by pay period and customized expressions. Descriptions of these options are listed below:

- The first **Date Range** field will allow you to choose the following options:
  - Calendar Range
  - Date Range
  - Pay Period

- The second **Date Range** field works in conjunction with the first option, as follows:
  - If **Calendar Range** is selected – A drop-down list of choices is available, including Current, Past, Future, and To Date are listed.

Date Range
Type

| Calendar Range | ▼ |

Date Range

| This Week | ▼ |

Current

This Week

This Month

Past

Last Week

Last Month

Future

Next Week

Next Month

- If **Date Range** is selected – Two calendar fields will display, allowing you to enter your own From and To date ranges.

Date Range
Type

| Date Range | ▼ |

From

| 10/13/2018 | 📅 |

To

| 11/12/2018 | 📅 |

Employee Filter

| All Employees | ▼ |

- If **Pay Period** is selected – Two fields will display and a calendar. The first field allows you to select the Pay Period Profile, if you have multiple pay periods in this drop down you will see the profile you are tied to as well as all active pay period profiles. Select the pay period profile you want to display data from. The second field is a pay period drop down that will allow you to select is the pay period you want to view data from is Current, Next, Previous or Date (specific date). If you select date, use the calendar to select the dates you want to view.

Employee Filter

By default, all employees will be included in the report. To change who is included in the report, click the Filter icon. You can locate the **Employee Filter** on the Global filter.


In the drop down, you can select All Employees or Browse.

When you select Browse, an Employee Filter window will open. From here you can check the boxes next to the employee you want to see on the report. You can also select based on Company Groups. To use Company Groups, click the Tab labeled Company Groups. From this tab you will see all the Company Groups that are

available. Check the box next to the group you would like to select.
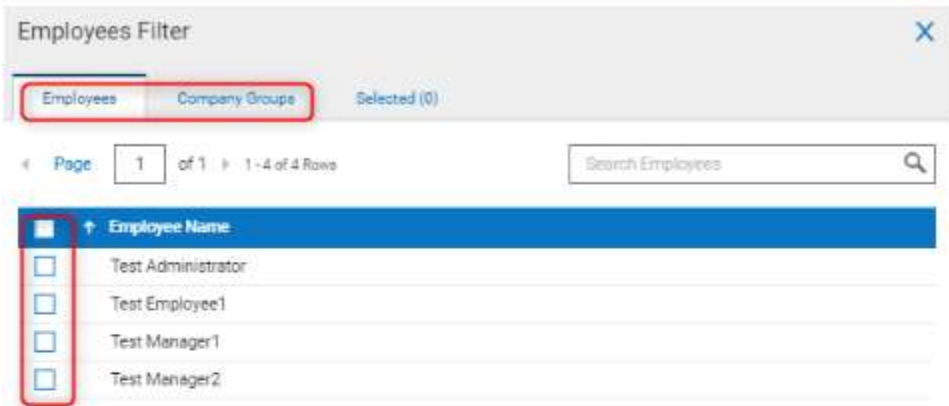
Once you have selected the employees or groups, click Apply.

Note: to view more employees or Groups per page, you can change the number of rows on each tab by clicking on the word "Page".
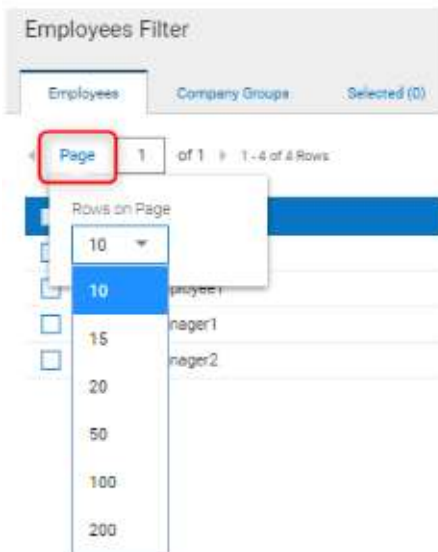
Customizing the Report Columns

Within any report you can add or remove columns as well as move columns left or right. To add or remove columns, follow these guidelines:
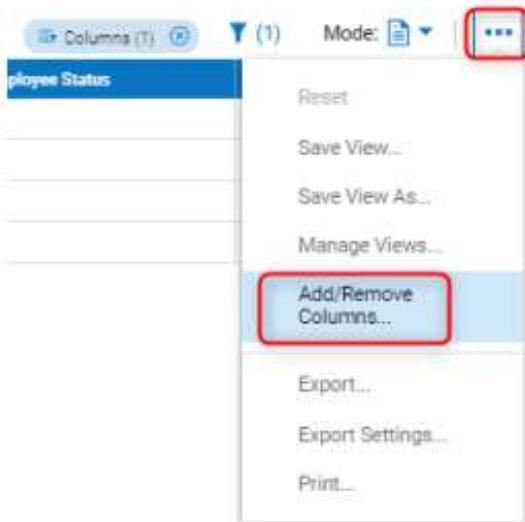
- Click the Action Menu icon and select Add/Remove Columns.
- The search field will appear at the top of the Add/Remove Columns Menu. Search parameters are flexible, and you can enter one or several key words to find a column.
- To add a column, check the box next to an option in the *Available Columns* section and click the **Add** button to move it to the *Selected Columns* section.
- To remove a column, check the box next to an option in the *Selected Columns* section and click the **Remove** button to move it to the *Available Columns* section.
- To move the order of the selected columns, check the box next to the item line you want to move, then click the up or down arrows until the column is located where you need it to be. You can select multiple items as well.
- When the selections are complete, click the **Apply** button to activate the view.

Rows on a Page

In some reports, you may not see all of the data on the page due to the rows not being visible due to being on the next pages. To change this setting, locate the **Page** information, (top left of the report). By default, 10 rows will be set to display. To show more rows, click on the **Page** hyperlink. A drop down will appear to allow you to select the number of rows you wish to display. The max for most pages will be 200. Once you select the number the page will refresh and display with the numbers you set.

Column Filters

To format and reorganize the report output, there are several options you can use. Example: To filter specific data from the report output, you can use the **Column filters** located in the Filter Menu.

Each column in your report will have a filter row located on this tab. Below is an explanation of the filter symbols and how you can utilize these to search more specifically for an item(s).

Filter Definitions & Examples

Symbol	Definition	Example
=	Entry is exactly this	The entry equals 11/30/16
! =	Entry is not this	The entry does not equal 11/30/16
starts with	Entry starts with	Entry starts with abc
not starts with	Entry does not start with	Entry does not start with abc
like	Entry is like	Entry contains abc
not like	Entry is not like	Entry does not contain abc
<	Entries are less than	The entry is before 11/30/16
>	Entries are greater than	The entry is after 11/30/16
<=	Entries are not less than	The entry is before or on 11/30/16
>=	Entries are not greater than	The entry is on or after 11/30/16
is null	Entries that are blank	The entry is blank
is not null	Entries that are not blank	The entry has been filled in
In	Entries that include	The entry includes 11/30/16
not in	Entries that do not include	The entry does not include 11/30/16
Between	Entries between two values	This only applies to numerical date values and cannot be used with alphabetical values

Once you have set up the filters, select Apply at the bottom of the screen.

Single Column Filters

You can also find a **Single Column Filter** menu on each column when you click on the arrow within the column header. This feature will allow you to filter for items quickly. When you use the **Single Column Filter**, you will see the same available search functions as you do in the column filters.
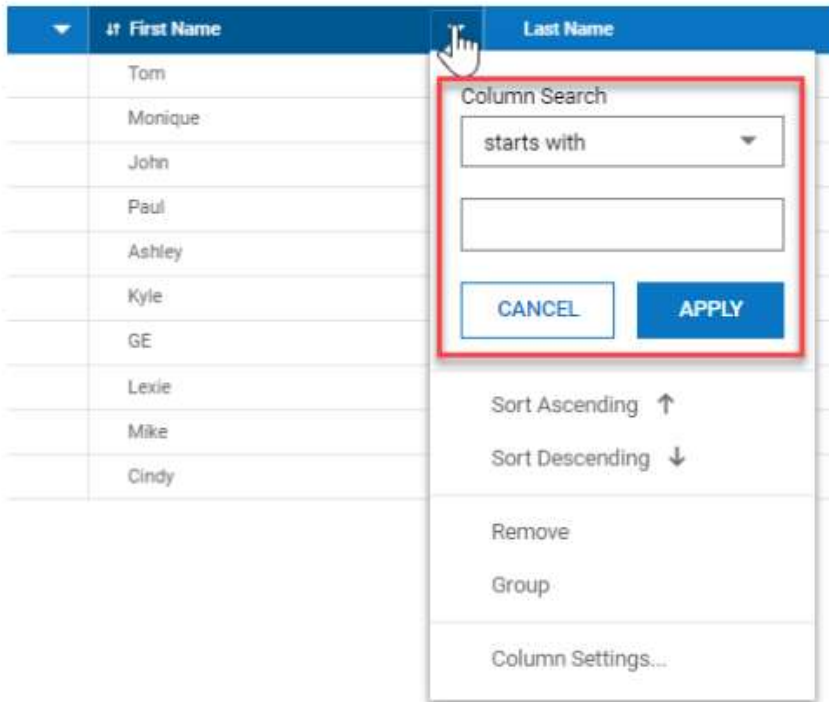
When using the Single Column Filter, enter the search criteria and then click the Apply button or hit enter. When the filter is applied, the report is refreshed and displays records that meet the filter criteria from the whole report, not just a single page. Columns that contain filter will also show a small Filter icon to the left of the column header name.

When a **Single Column Filter** has been applied to a report, you will also see this filter criteria in the **Column Filters.**
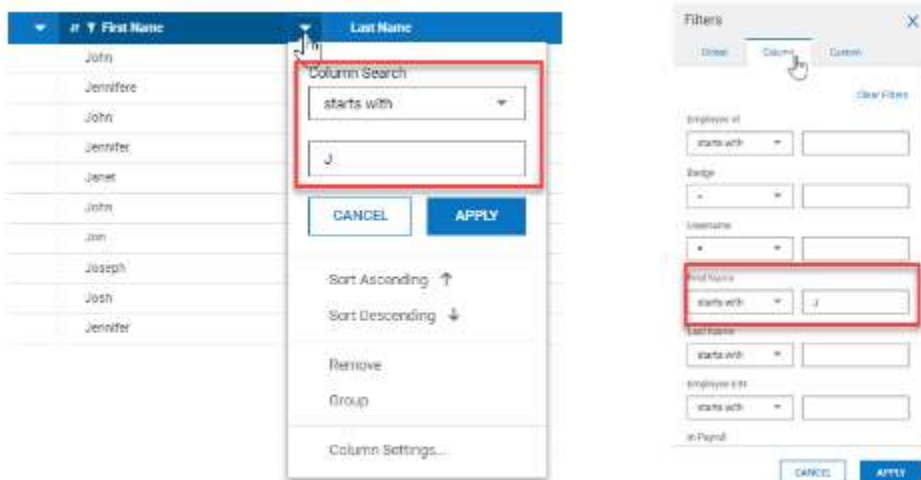
Group Columns

To group information, hover your mouse over the column header until you see the drop-down arrow on the right side of the header, click the drop down and select **Group**. Make your grouping selections. The Grouped By columns will appear to the left side of the report.

There are 2 ways to ungroup the columns. The first is to click the drop down menu on the "Grouped By" header line. This will open a menu showing each Grouped column. Uncheck the box next to the group you want to ungroup, and select Apply.

The second way to ungroup a column is to locate one of the grouped lines under the Group By column, select the drop down menu on that line and select **Ungroup**.

Sort Columns

You also have the ability to Sort the data on the report. Select the Column you want to use to Sort the data, hover over the Header and click the drop down arrow when it appears. In the drop down menu select Sort Ascending or Sort Descending.

Once you sort the column, you will see an arrow to the left of the header name showing the direction of the sort.

You can also quickly sort a column by hovering over the column header and selecting the double arrow icon to the left of the header name.
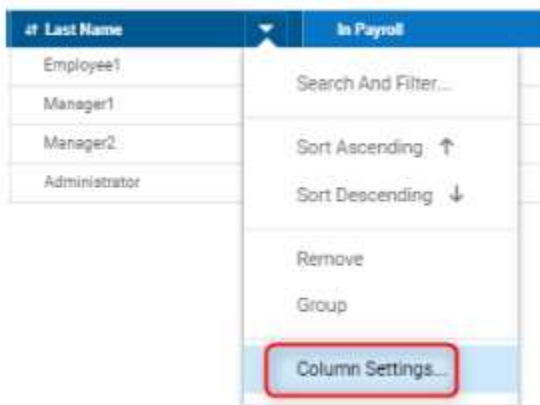
Once you have your report set to the view you would like to see, you will now want to save your report. To save your report see the below section on Saving Report Views.

Column Settings

When setting up a report you may find that you need the header of the column to read differently or the data within the column to be aligned to the right or center of the column. You can make these types of changes to the columns using the **Column Settings**. To locate the **Column Settings** hover over the column header you want to change, and click the drop down menu to the right of the column header. In this menu select **Column Settings**.

The **Column Settings** menu will pop up. Within the settings box you can update the following items:

- **Width (pixels)** - enter a valid range between 100-700 pixels)
- **Alignment** - Alignment settings will move the data within the column to the set alignment. Select System Default, Left, Center or Right.
- **Customize the Label for** - Enter the label/name for the header of this column.

In the below example you will see that we changed the column settings for the Last Name column to align the date to the center of the column and changed the label to read Last.

Saving Report Views

You can save commonly used report settings for use in running subsequent reports.

To save report settings, follow the below steps:

1. Ensure your report settings are configured to your liking.
2. Under the Action Menu (**···**) you will find options to Save View or Save View As.
   - ○ Save View will save over the report you were currently viewing
   - ○ Save View As will allow you to save the report as a new report.
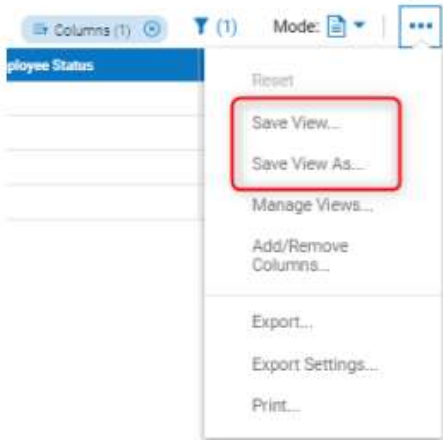
3. Once you select either Save View or Save View As, a pop up will appear, see image below. complete the following fields:

- **Name** - Enter an appropriate name for the report.

- **Description** - Enter a description for the report, if desired.
- **Tag** - Enter keywords associated to report, if desired.

Mark the proper checkboxes for the fields below:

- **Deletion Of This Setting Is NOT Allowed** - Check this box if this report should not be deleted or edited.
- **My Default** – Select this box if this should be your default view.
- **Share** – Select this button to make this report visible to others.

Note When you select "Save View" the pop up will appear with the current report settings. Changing these items will override the current saved settings, it does not create a new report. When needing to create a new report you will need to select "Save View As".

Once you save your report you can now find this report under your My Saved Reports, located under Reports within the Favorites menu. You also will be able to select the saved view when you access the original report from the menu. To learn more about how to view your reports, see the below Managing Report Views.

Managing Report Views

When you create and save reports, you will have the ability to access these from 2 places. The first place is under My Saved Reports. This menu item is found under Reports from the Favorite Tab.
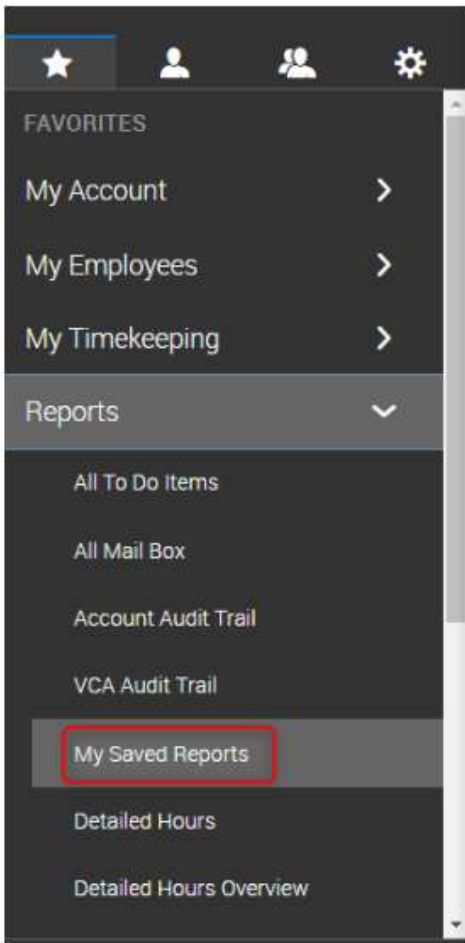
From within the My Saved Reports screen, you can locate the name of your report (this is the name you assigned the report when saving) under the Saved As column. Use the Search at the top of the screen if you have several reports you are looking through, to quickly locate your report. To access the report simply click on the Saved As name or by select Run from the Action Menu shown on the same line as the report name.

The second way to view your report, is to navigate to the original report menu. (EX: If you created an Employee Information report from the My Teams > Employee Information screen navigate back to this screen). Once you are on the original report screen, to the top left of the report data you will see a Saved drop down menu. If the default has not been changed, then next to saved in brackets you will see the word System. This means the report is using the system defaults.

If you saved a report and marked it as default for this screen, you will see the Saved: followed by the report name you saved as default.


To see additional views, with either of the above showing, click on the arrow drop down next to the Saved name. From here you will see all reports saved from this menu. You will see your saved reports as well as any reports that others have shared with you. To run one of these views, simply click on the view and the screen will populate with the report data.
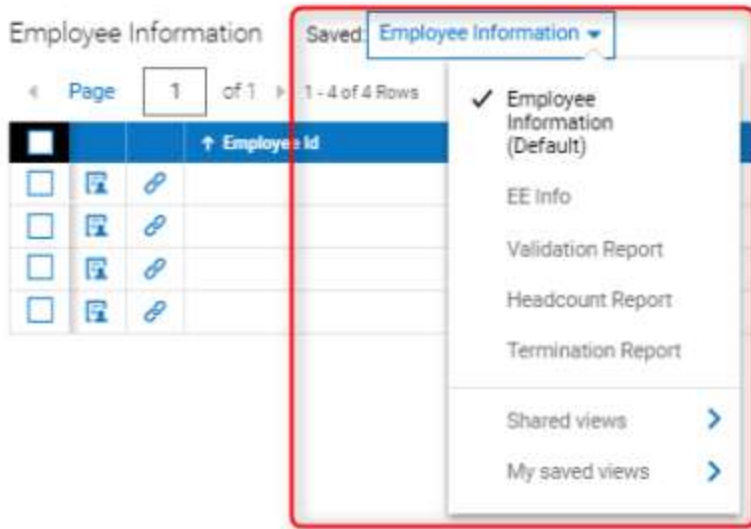
You can also Manage Views from the Action menu on the screen. Once you navigate to a report or screen, click the Action Menu to the right of the screen and select **Manage Views**.
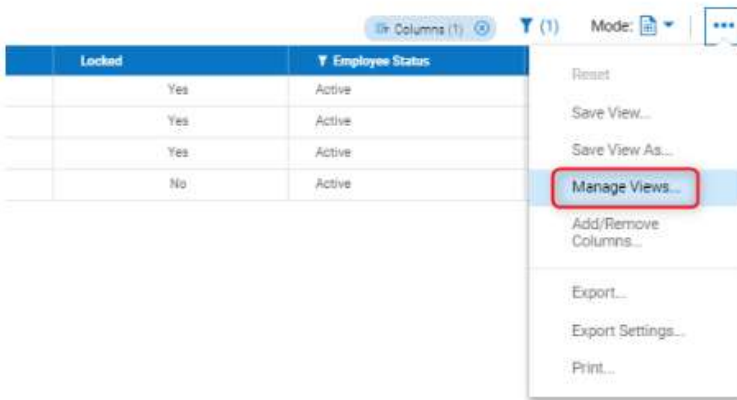
The Manage View screen will pop up. This screen gives you details on the report view, the owner of the report, when it was created and default settings.
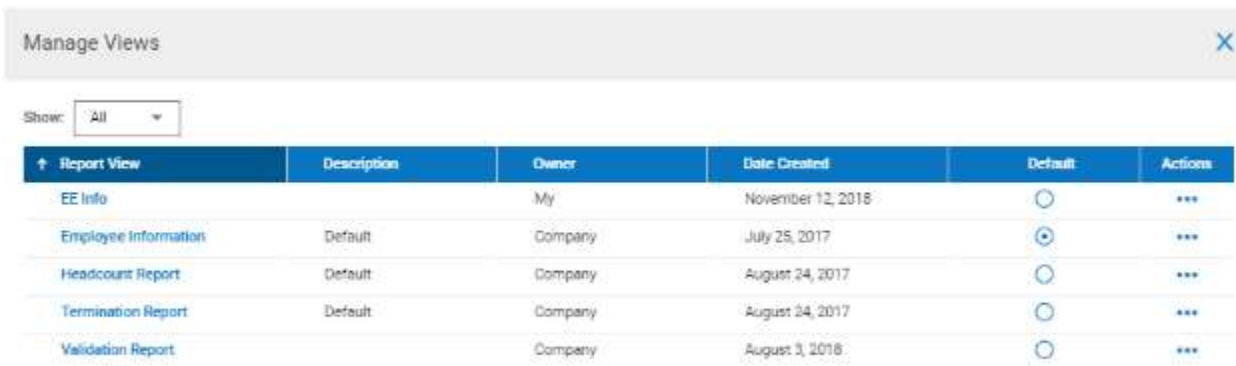
You will see a Show drop down at the top. This will allow you to see All the reports or filter for those shared with you, just your reports or system reports.
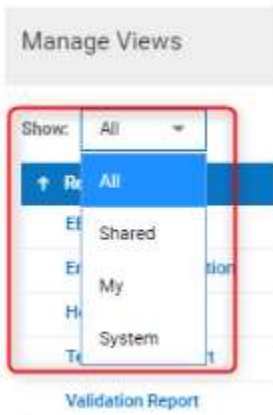
You can also change your default screen by selecting the radio button on the line of the report you wish to set as your default.

From the Action Menu, located to the right of the report name you can Run, Edit or Delete the report. If a report setting was marked "Deletion Is Not Allowed" the Delete option will not appear in this menu. Editing from the Action Menu will allow you to change the report Name, Description, Tag or change the deletion settings, set as My Default or share the report.
Note: You can also run the report by clicking on the Report View name