SELECTING THE TIME PERIOD OF A REPORT
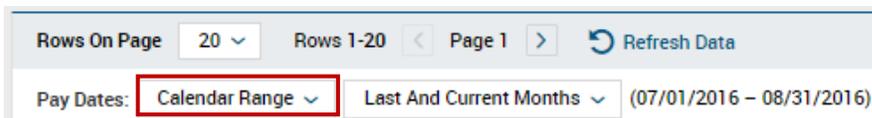
To find a report, go to **My Reports > HR** or **Payroll** or **System**, depending on what report you are looking for.

To control the period of time that is covered by the report, use one of the following options:
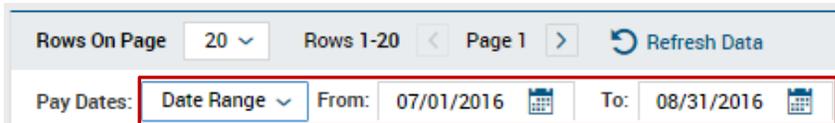
- **Calendar Range:** select from a predetermined date range including this month, this year, this week, last month, last year, etc.

Rows On Page	20 ∨	Rows 1-20	‹ Page 1 ›	↺ Refresh Data
Pay Dates:	Calendar Range ∨	Last And Current Months ∨	(07/01/2016 – 08/31/2016)	

- **Date Range:** select a specific date range for your report.

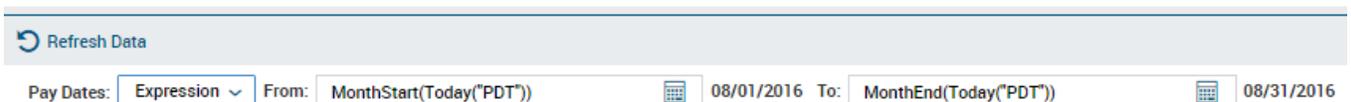| Rows On Page	20 ∨	Rows 1-20	‹ Page 1 ›	↺ Refresh Data
Pay Dates:	Date Range ∨	From: 07/01/2016 📅	To: 08/31/2016 📅	

- **Pay Period:** select from the current, next, or previous pay periods.
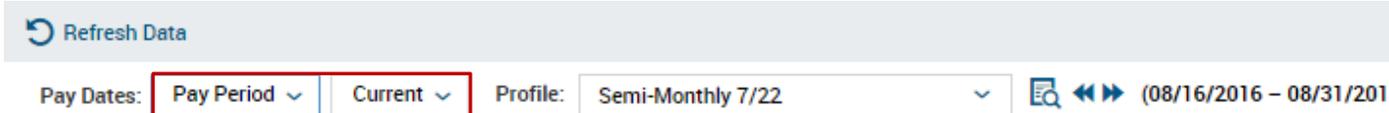
↺ Refresh Data

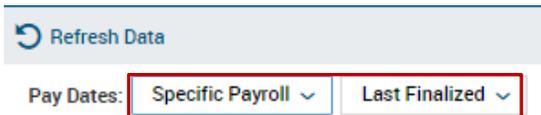| Pay Dates: | Pay Period ∨ | Current ∨ | Profile: | Semi-Monthly 7/22 ∨ | 🔍 ⏮ ⏭ (08/16/2016 – 08/31/201 |

- **Expression:** allows you to create a specific formula to select the pay periods for the report.

↺ Refresh Data

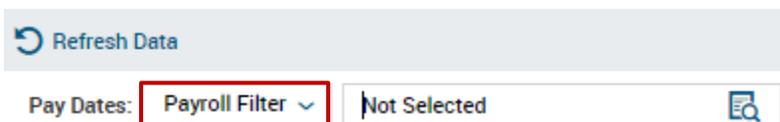| Pay Dates: | Expression ∨ | From: | MonthStart(Today("PDT")) | 📅 08/01/2016 | To: | MonthEnd(Today("PDT")) | 📅 08/31/2016 |

- **Specific Payroll:** select a specific payroll for the report.

↺ Refresh Data

| Pay Dates: | Specific Payroll ∨ | Last Finalized ∨ |

- **Payroll Filter:** You can create a filter to pick and choose which reports you want to bring in.

↺ Refresh Data

| Pay Dates: | Payroll Filter ∨ | Not Selected | 🔍 |

Click on the ![icon] icon. You can click on each box individually to select the payrolls to include in the report. Click on the ![flag icon] con and then **Use Filter**.

Click on the ![Refresh Data] icon after selecting your time period to run the report.

ADDING OR CHANGING REPORT COLUMNS

You can change the columns included in a report by clicking on the ![Select Columns] icon at the upper right of the page.

- Move any of the **Available Columns** into the **Selected Columns** area by clicking on the ▶ icon. Then click on the 🔍 **Select Columns** icon at the bottom of the open box.

When you hover over the section above field names, ![G] and ✕ symbols appear. The ![G] symbol lets you group the data on the screen by that data type.

- Grouping will provide you with subtotals.

- You can group multiple times, i.e. location and then department, by holding down **Control** and clicking the ![G] for the first, second, or third time.

- When items are grouped, the column header will move to the top of the report, so you can still filter and sort.

- Use the up and down arrows ![arrows] to sort the data contained in the columns in either ascending or descending order. For a second level sort, select **Control** when you select the up or down arrow.

- You can also use the drop down menu ![= dropdown] to search more specifically for an item.

- Once a column is grouped, it will move to the far left of the screen and be hidden. To ungroup or select specific things in a grouped column, select ![Click here to expand grouped columns] From here, you can ungroup by selecting ![U] .

- The ✕ symbol lets you remove that data column altogether from the results displayed on the screen.
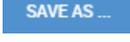
REPORT FILTERS

The **Employee Filter** ![icon] icon allows you to filter reports by choosing specific employees or groups of employees. Once you click on the icon, a screen appears with six labeled tabs at the top of the screen.

- **Not Selected:** displays all available employees. You can click on each box individually to select employees to include in the report. Click on the

  ADD SELECTED icon and then **Use Filter** to select employees.

- **Selected:** displays all selected employees.
- **Saved Lists:** displays all previously saved lists. You can create new lists by clicking on the **Save List As** icon.
- **Company Groups:** allows you to filter a report by company groups.
- **Company Profiles:** allows you to filter a report by company profiles.

SAVING REPORTS

You can save your settings so the report will always appear the way you have modified it. You can save multiple reports as long as they have unique names.

- To save a report, click on the **⚙ Settings ∨** icon in the upper left hand section of the screen and select Save Settings from the menu.

- Enter a unique name for your report.

- If you would like this report to be the default report (the one that first loads when you select the report), then place a check mark in the **Default Box**.

- Check the box to run it immediately, if this is an available option.

- If you are saving a report for the first time, enter a report name and then click on the **SAVE** icon located in the floating bar at the bottom of the pop-up window. You <u>must</u> enter a report name the first time you save a report.

- If you are modifying an existing report, you will have the option to **SAVE** or **SAVE AS ...** in the floating bar in the pop-up window.

- If you select the **SAVE** icon, you will overwrite the previous report with the same name.

- If you select the **SAVE AS ...** icon, you will create a new report.

LOADING SAVED REPORTS

When you go into any report area, the default report automatically loads. To load an alternate report you have already saved:

- Click on the **⚙ Settings ∨** icon located in the upper right hand side of the screen and then select Load Saved Settings from the drop down menu. A list of all of your saved reports will appear.

- Select the 🚩 icon located to the left of the report you would like to load and the report will be loaded.

- Alternatively, click on the down arrow located in the dropdown field to display a list of all saved reports based on the report you are currently viewing.

EXPORTING/PRINTING REPORTS

You have the ability to export and print reports to a number of different formats.

- Click on the icon in the upper right hand section of the report screen.

- Click on the icon located to the left of the format you'd like to use. For example, if you want a PDF output file, click on the icon.

- Once the program opens with your data, you will be able to use the **Print** button from the selected program's Print menu. You can also save the report from the selected program's **File** menu.