Running a Report

Guide

My Reports has a set of default reports that you can access. The reports available depend on your organization and your system access. This job aid guides you through navigating My Reports, so you can run, view, and export standard reports.

Accessing My Reports

The reports under **My Reports** are listed under the applicable module subcategory. The available reports vary based on your permissions.

1   In the Menu, select the **My Info** tab.

2   Navigate to **My Reports**, then select any subcategory to display choices.

3   Click the report name to open it.

Navigating My Reports

Reports have various icons, filters, and actions available. The main areas of the page are highlighted below.

Did you know?

My Saved Reports is not module specific. This page provides an area from which to access all your saved reports from various areas throughout Employee Self Service.

B   C   D   E

Benefit Census Report   Saved: [System] ▼

A ← Page [1] of 4 ▶ 1 - 10 of 34 Rows   📅 As Of Date: 10/12/2018   ▼ (1)   Mode: 📄 ▼   •••

	Last, First Name	Date Birthday	Date Hired	Salary	Dental	Medical
	Edwards, Alan	09/26/1970	12/19/2002	$20,800.00	Employee Only	Employee Only
	Wilcox, Adil	06/23/1977	10/22/2008	$22,880.00	Employee + Spouse	Employee + Spouse
	Harrell, Anel	09/15/1982	03/11/2008	$23,920.00	Employee + Family	Employee + Family
	Decker, Amy	11/24/1988	10/25/2013	$22,360.00	Employee + child(ren)	Employee + Child(ren)
	Edwards, Ben	03/15/1982	12/23/2016	$19,240.00	Employee Only	Employee Only
	Giles, Bruce	04/10/1988	11/15/2009	$27,040.00	Employee + Spouse	Employee + Spouse
	Small, Chad	12/17/1983	12/17/2007	$23,920.00	Employee + Family	Employee + Family

F

Salary by Dental

Charts can be turned on/off and customized.

•••

Employee + child(ren)
Employee + child(ren)
Employee + child(ren)   Employee + child(ren)
Employee + child(ren)   • Salary: $63,024
Employee + Family
Employee + Family
Employee + Family
Employee + Family
Employee + Spouse
Employee + Spouse
Employee + Spouse
Employee + Spouse

Dental

Roll your cursor over the chart to display additional data.

Click the ellipsis to display more chart options.

A	**Page:** Use this setting to change the number of records per page.		**D**	**Mode:** Use to display data only, charts only, or both as shown in the image.
B	**View menu:** Click the drop-down arrow to display a list of available views. Saved views are added to this list.		**E**	**More (…):** Opens a menu with options such as saving views, exporting, and printing the report.
C	**Filter:** Use to set filter criteria for the report data including dates. You can adjust global and column filters.		**F**	**Report workspace:** This area displays record data based on your filters and selected columns.

Using the More (…) menu

1 Click the **Ellipsis (…)** button to open a menu.

The options are described in the following table.
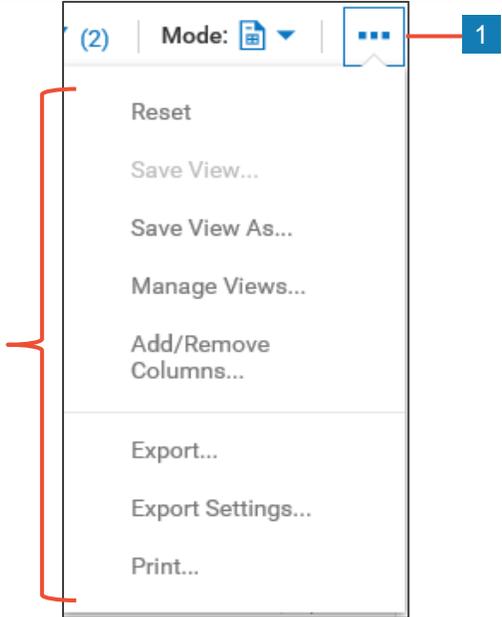
Option	Description
Reset	Select to return the report to the original saved settings.
Save View	Select to keep changes to a saved view.
Save View As	Select to create a new saved view.
Manage Views	Select to display the Manage Views dialog box with a list of your saved views.
Add/Remove Columns	Select to display the Add/Remove Columns dialog box.
Export	Select to export the report data in a selected format such as Excel or PDF.
Export Settings	Select to display the Export Settings dialog box.
Print	Select to print the report. Options may vary depending on your printer setup.

Selecting Report Columns

Each report has a default set of columns. However, you can add, remove, and reorder columns.

1   Click **More …** then select **Add/Remove Columns**.
2   In the **Add/Remove Columns** dialog box, you can:
    a. **Add columns**: In the Available Columns pane, select the check box of the column(s) you want, then click **Add** to move the columns to the Current Columns pane.
    b. **Remove columns**: In the Current Columns pane, select the check box of the column(s) you want to remove, then click **Remove** to move the columns to the Available Columns pane.
    c. To arrange columns, click the check boxes of the columns you want to move, then click the up and down arrows.
3   Click **Apply** to keep your changes to the report.

Filtering report columns

Each report has columns of data that you can filter, sort, and group.

1   Click the **Filter** icon.
2   Click the **Column** tab.
3   Click the drop-down menu in the field below any column name and select the filter type.
4   Enter the search criteria in the second field and click **Apply**.
5   You can clear all filters by clicking **Clear Filters**.

Using column menu options

1 Roll your cursor over any column heading to reveal sorting icons and a drop-down menu.
2 Click the drop-down arrow to open the menu. Options vary depending on the data type.
3 Click an option.

- **Search And Filter**: Use to search for a specific column value.
- **Sort Ascending/Descending**: Sort the report data based on this column.
- **Remove**: Use to remove the column.
- **Group**: Use to group results by this column.
- **Column Settings**: Use to change the column appearance.
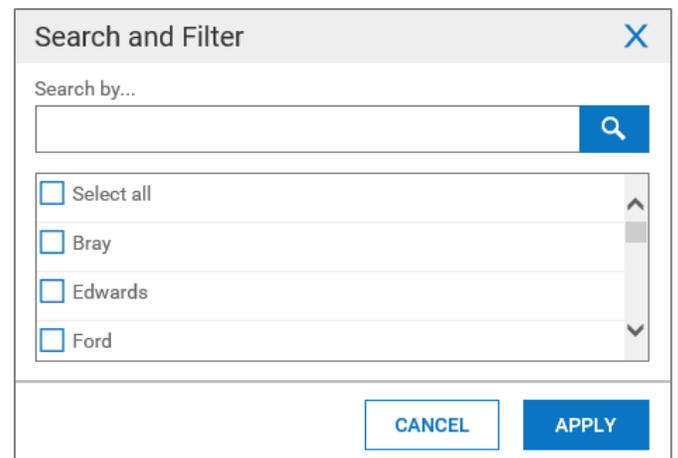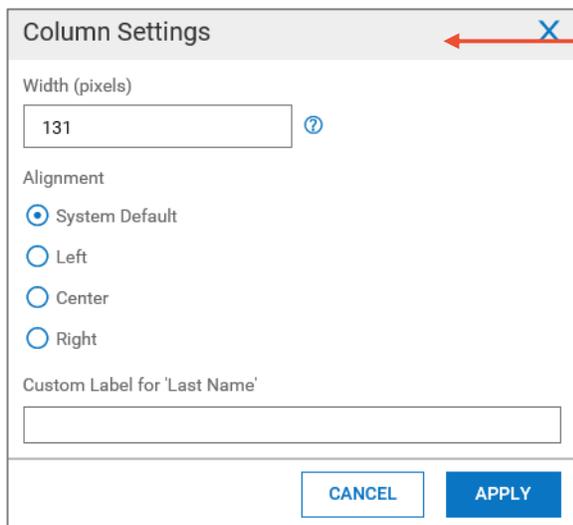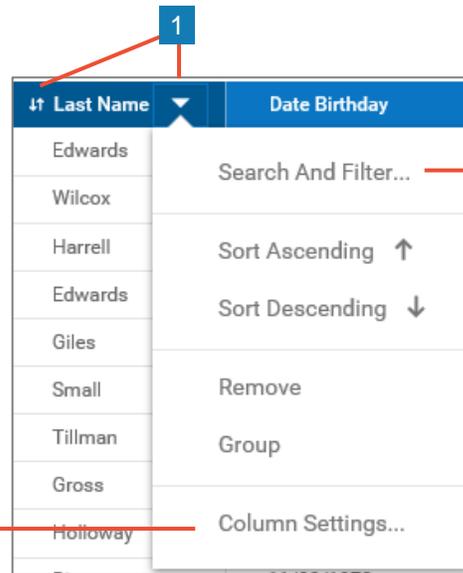
Exporting reports

You can export reports for further analysis.

1 In the More **(…)** menu, select **Export**.
2 The report header/footer data is included by default. To remove these items from your report, clear the **Display Information Header/Footer** check box.
3 Click the **Export File As** drop-down menu and select the applicable report format.
4 Click **Export**.
5 Save the report to your preferred location.