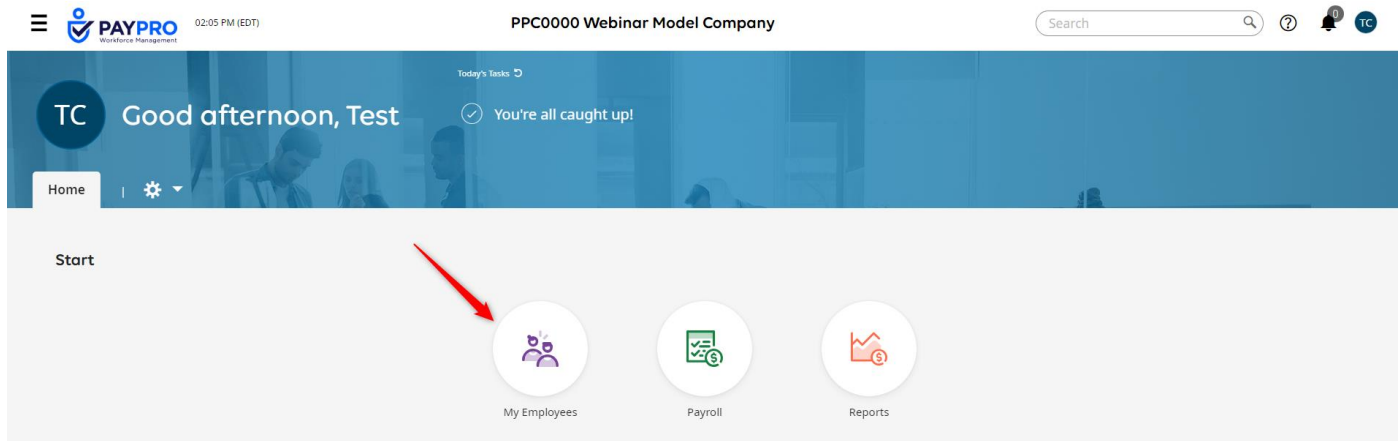




How to: Create Reports

Go To **My Employees>Employee Information**



Every screen which looks like the image below is a report you may format, save and export. Pull in columns or sort and filter by selecting the ellipsis (actions) icon:

My Team > Employee Information

← Employee Information

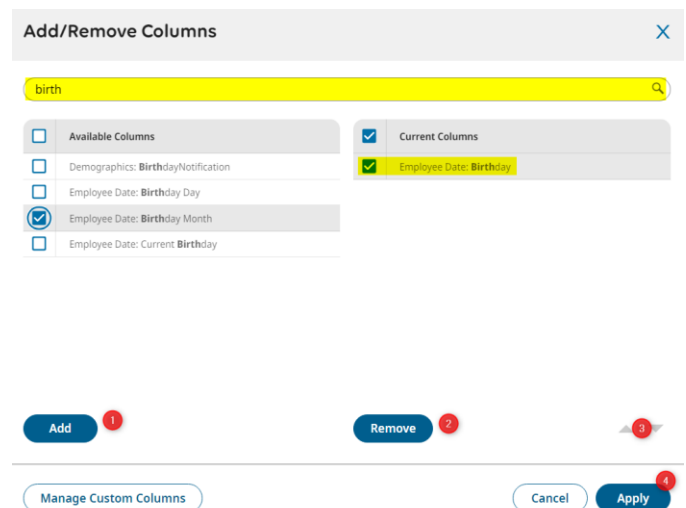
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Columns (1) 1 (1)

	Employee Id	First Name	Last Name	Employee Status	Date Hired	
		starts with	starts with	In Terminated		
<input type="checkbox"/>	999999	Test	Employee	Active	09/03/2018	
<input type="checkbox"/>	999998	Test	Manager	Not In Payroll	09/03/2018	
<input type="checkbox"/>	999997	Test	Client Admin	Not In Payroll	07/10/2020	
<input type="checkbox"/>	999994	PayproCCAPuser	PayproCCAPuser	Not In Payroll	11/08/2021	

To Add/Remove Columns:

1. Select the Actions icon
2. Select Add/Remove Columns
 - a. In the Add/Remove Columns window, under Available Columns, select columns to include and select **Add**
 - b. In the Add/Remove Columns under Current Columns, select columns to delete from the report, and select **Remove**
 - c. To rearrange current columns, select the column(s) to move up or down and select the up and down arrows
 - d. Select **Apply**



*You may use the Search bar at the top of the screen to pull in specific fields. SSN is stored as SS# in the search bar.



Column Menu Options:

Select the drop-down list of any column to open the menu. Column options vary and depend on the column data type (alpha or numeric).

1. **Column Filter:** Use to search for a specific column value
2. **Sort Ascending/Descending:** Sort the report data based on this column
3. **Remove:** Use to remove the column
4. **Column Settings:** Use to change the column appearance
5. **Group:** Use this option to group results by this column

The screenshot shows the PAYPRO interface with a report table. The 'Raw Hours' column has a dropdown menu open, showing options: 'Column Filter' (1), 'Sort Ascending' (2), 'Sort Descending' (2), 'Remove' (3), and 'Column Settings...' (4). The background shows a report table with columns like 'Grouped By' (5) and 'Report Category Payroll'.

Column Settings options are detailed below:

Column Settings ✕

Width (pixels)
 ?

Alignment
☐ System Default
☒ Left
☐ Center
☐ Right

Custom Label for 'First Name'

Cancel Apply

Clear Values:

*Use the button to the right to clear out any updates you made to the report

The screenshot shows the 'Employee Information' report. The report table has columns: 'Employee Id', 'First Name', 'Last Name', 'Employee Status', and 'Date Hired'. A red arrow points to the 'Clear Values' button (a circular arrow icon) in the bottom right corner of the report table.



Report Filters:

There are different filters you may use to help organize data. Some examples are provided below:

My Team > Employee Information

← Employee Information

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Employee Id	First Name	Last Name	Employee Status	Date Hired
999999	Test	Employee Manager	Terminated	01/01/2018
999998	Test	Manager	Not In Payroll	09/03/2018

Symbol	Definition	Example
=	Entry is exactly this	The entry equals 9/3/2018
!=	Entry is not this	The entry does not equal 9/3/2018
<	Entries are less than	The entry is before 9/3/2018
>	Entries are greater than	The entry is after 9/3/2018
>=	Entries are not greater than	The entry is on or after 9/3/2018
<=	Entries are not less than	The entry is before or on 9/3/2018
starts with	Entry starts with	Entry starts with abc
not starts	Entry does not start with	Entry does not start with abc
like	Entry is like (several entries should be separated by comma with no space)	Entry contains abc
not like	Entry is not like	Entry does not contain abc
in	Entries that include	The entry includes 9/3/2018
not in	Entries that do not include	The entry does not include 9/3/2018
is null	Entries that are blank	The entry is blank
is not null	Entries that are not blank	The entry has been filled in
between	Entries between two alphanumeric values separated by a semicolon	The entry is between 100 and 300. The entry is between A and M
not between	Entries that are not between two values	The entry is not between two values; 100 and 300, A and M
Yes/No	Entries with either a yes or no value	Applies to data fields with yes/no as the only options

*Yes/No will pull in with columns such as "Locked" (which identifies if employee account has been locked)

Filtering for Multiple Columns:

1. Select the Filter icon

Hire Terminate Rehire View

Columns (1)

Employee Status Date Hired

2. Select the **Column** tab
3. Select the drop-down menu in the field below any column name and select the filter type
4. Enter the criteria in the field and select **Apply**
5. You may clear/refresh filters by selecting **Clear Filters**

Filters

Global Column Custom

Clear Filters

Employee Id =

First Name starts with Test

Last Name starts with Employee Manager

Employee Status != Terminated

Date Hired > 01/01/2018

Cancel Apply

How To: Save Reports

1. In the Actions icon select **Save View As**
2. **Name** the Report **required field*
3. Select as **My Default** if you would like the report to be your default view when you navigate to this screen
4. **Share**: You may share with individuals or groups by selecting the “Browse” option in the drop-down menu
5. Click **Save & Run**

You may select **Deletion and Overwriting Is Not Allowed if you wish to restrict future edits of the report.*

*****Save View** will save the current report view and this option can be used any time you need to make adjustments. **Save View As** will save the current report view—you must re-name the report.*

Once the report is saved, it will appear in your My Saved Reports. If you have shared it with others, it will appear in their My Saved Reports view as long as they have enabled **Others’ Settings** and their Security access allows them to view the report data:

Others’ Settings  Columns (1)  Y (2) 

Save View As

Name *

Employee Birthdays

Description

Tag

☐ Deletion and Overwriting Is Not Allowed

☐ My Default

☒ Run Immediately

☒ Share

☒ Share With Others

All Employees

Cancel

Save

Save & Run

How To: Export Reports

1. In the Actions icon, select **Export**
2. The report header/footer data is included by default. To remove these items, clear the **Display Header/Footer** check box
3. Select the **Export File As** drop-down menu and select the report format (CSV, Excel, PDF, HTML, XML or Text)
4. **Export Settings** options will enable you to select/deselect certain data and format margins/layout, etc.
5. Select **Export**
6. Save the report in your system

Export

Export Settings

Export File As

CSV

☒ Display Header/Footer
 ☐ Use Unicode

Cancel

Export