

User Created Reports

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The Payroll User Created Reports page allows you to perform the following functions:

- Select the applicable fields (i.e., columns) from preselected columns under the following sections:
  - **Employee Demographic**
  - **Certification** - This is a Personnel section and only displays if you have security access to Certification in Personnel.
  - **Responsibility** - This is a Personnel section and only displays if you have security access to Responsibility in Personnel.
  - **Employment** - This is a Personnel section and only displays if you have security access to Employment in Personnel.
  - **Pay Information**
  - **Extra Duty Pay**
  - **Bank**
  - **Job Information**
  - **Distribution**
  - **Deductions**
- Create a report title.
- Save your report selections to create a customized report template that can be retrieved for future use. Additionally, you can set a report template to **Public** to allow others with access to User Created Reports to view and use the created report template.

Once the report is created, it can be sorted or filtered. To restore the report to the original view, click **Reset**.

Run a report from a saved template:

Report Template	Begin typing all or part of the name of an existing report template, or press the space bar to view all the templates. As you begin to type, a drop-down list displays report templates with titles that match the letters you have typed. From the drop-down list you can select the template. Only templates you created are listed in the drop-down list. If you do not know the name of the report template, click Directory to select a report template from the directory. From the directory, you can select templates you created as well as public templates.

Create a new template:

Report Template	Type the name of a new report template. Only alphanumeric characters are allowed. If you type a name that is already used, it will overwrite the previous template.
Public	Select to make the report accessible to other users. All users in the district who have access to this page will be able to use the template.

- After entering the title and selecting the columns to include, click **Save**.

Create a new report:

Report Title	Type a title for the report, up to 35 characters.

- The fields are grouped by business table. Select the fields for which you want to print information. You can select an entire group of fields by selecting the group name (e.g., **Employee Demographic**).
- In the **Employee Nbr** field, click to open the Employees directory. Select the employees to be included in the report or leave blank to include all employees.
- Select **Active Employees Only** to include only active employees.
- Click **Create Report** to generate the report. Review, save, and/or print the report.

  Review the report using the following buttons:

  Click First to go to the first page of the report.
  Click to go back one page.
  Click to go forward one page.
  Click Last to go to the last page of the report.

  The report can be viewed and saved in various file formats.

  Click to save and print the report in PDF format.
  Click to save and print the report in CSV format. (This option is not available for all reports.)
  When a report is exported to the CSV format, the report headers may not be included.
  Click **X** to close the report window. Some reports may have a **Close Report**, **Exit**, or **Cancel** button instead.

Other functions and features:

Sort	Sort report data. You can rearrange the fields to indicate the order in which you want the sort applied. Click a field name, and drag it up or down to a new location. • In the right grid, for each field, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order. • To remove a field from the sort, select the field, and

Filter

Filter report data.

When you want to view only certain data, you may find it useful to filter the report data. You can use specific criteria to retrieve only the data that you want. Not all reports allow this option.

From the report window, click **Sort/Filter** to open the Sort/Filter window. By default, the **Sort Criteria** section is expanded. Click **Filter Criteria** to expand the **Filter Criteria** section.

If the report does not allow sorting, the **Filter** button is displayed instead of the **Sort/Filter** button, and sort criterion fields are not available.

Click **Add Criterion** to add new filter criteria. A blank row is added to the grid.

Field	Description
Column	Select a field by which to filter the data. The drop down lists the columns that appear on the report.
Operator	Select an operator. = Equals ≠ Not equals › Greater than ≥ Greater than or equal to ‹ Less than ≤ Less than or equal to
Value	Type the value by which you want to filter. For example, if you selected a date in the **Column** field, type a date to view only data for a specific date. **Note**: When filtering report data by date, you must use the following formats: If the date is displayed in the MM/DD/YYYY format, the filter value must be in the YYYYMMDD format. If the date is displayed in the MM/YYYY format, the filter value must be in the YYYYMM format. If the date is displayed in the MM/YY format, the filter value must be in the YYMM format.

Other functions and features:

Add Criterion	Add another row. Select the logical connector (AND or OR) in the Logical field. Continue adding rows as needed. Using the AND operator limits search results, because the program looks only for records that contain both criterion. Using the OR operator expands search results, because the program looks for records that contain either one criterion or the other, or both.
Delete Selected	Delete selected row. Select the row, and then click the button. The row is deleted from the filter criteria.

Click **OK** to apply the selected filter criteria to the report.

Click **Cancel** to close the dialog box without applying a filter.

Reset

Reset report data.

Click to restore the report to the original view, removing all sorting and filtering that has been applied.

Delete

Delete a report template.

Select the template in the **Report Template** field and click **Delete**.


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