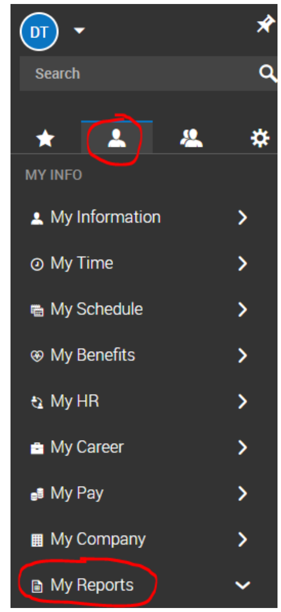
Reporting Basics

This job aid indicates where to find both standard and customized reports in UEIWorkforce. It also provides instructions on how to create a custom report.

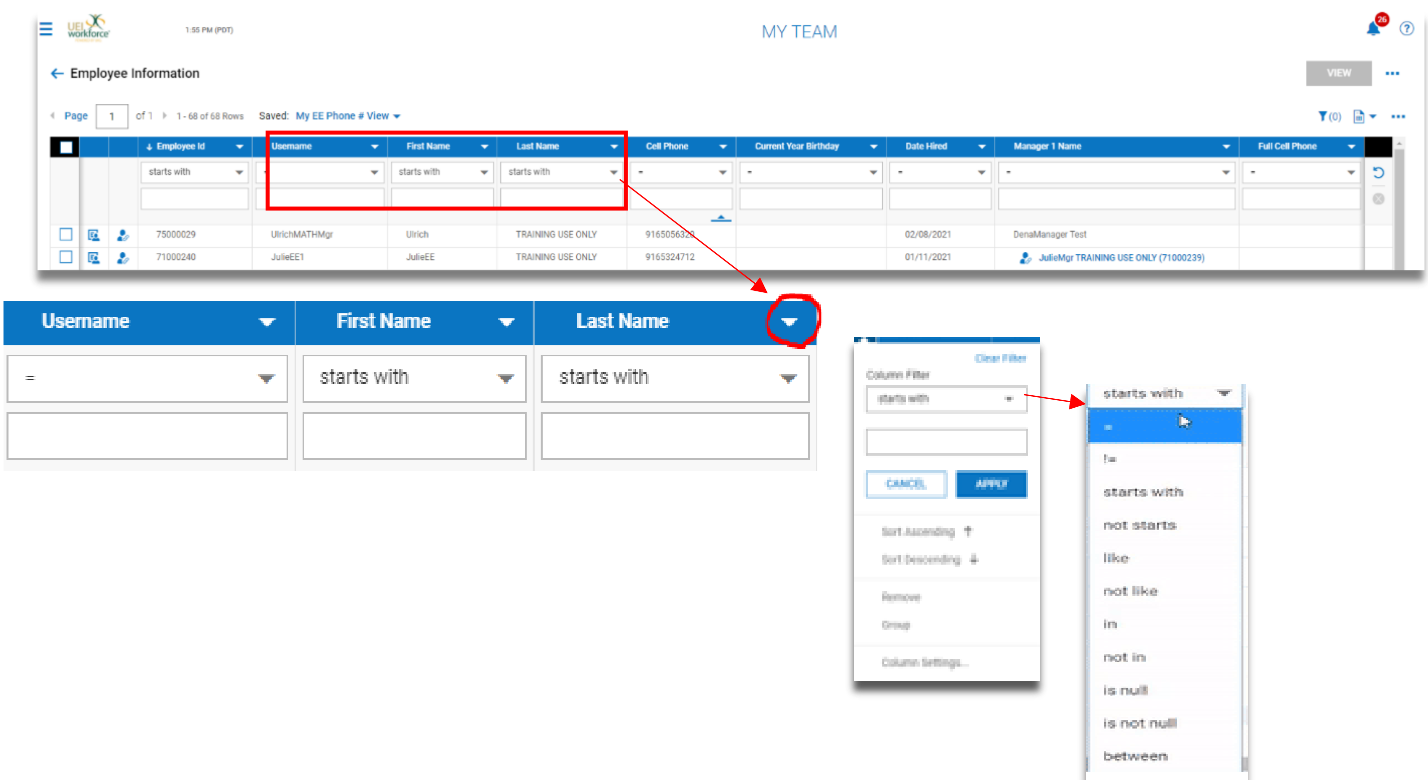


Standard Reports

A wide selection of standard (ready-made) reports can be found within the main menu under ***My Reports***. To find out more about the system's 100+ standard reports, please see ***UEIWorkforce Job Aid – Report Definitions***.

Sorting Reports

Report data can be sorted using the drop-down menus next to each column header



On the right is a **key** to the sorting option symbols.

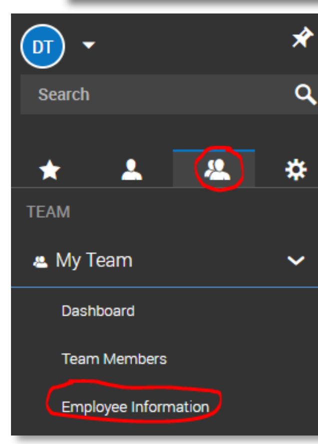
Symbol	Definition	Example
=	Entry is exactly this	The entry equals 11/30/15
! =	Entry is not this	The entry does not equal 11/30/15
starts with	Entry starts with	Entry starts with abc
not starts with	Entry does not start with	Entry does not start with abc
like	Entry is like	Entry contains abc
not like	Entry is not like	Entry does not contain abc
<	Entries are less than	The entry is before 11/30/15
>	Entries are greater than	The entry is after 11/30/15
<=	Entries are not less than	The entry is before or on 11/30/15
>=	Entries are not greater than	The entry is on or after 11/30/15
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 11/30/15
not in	Entries that do not include	The entry does not include 11/30/15

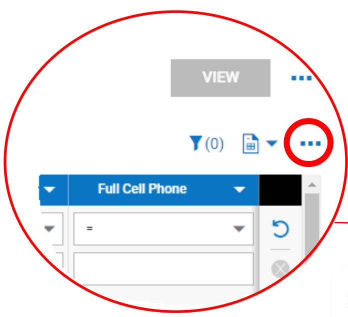
Creating Custom Reports

Custom reports can be built from most views within UEIWorkforce. For this purpose, we willuse the Employee Information view.

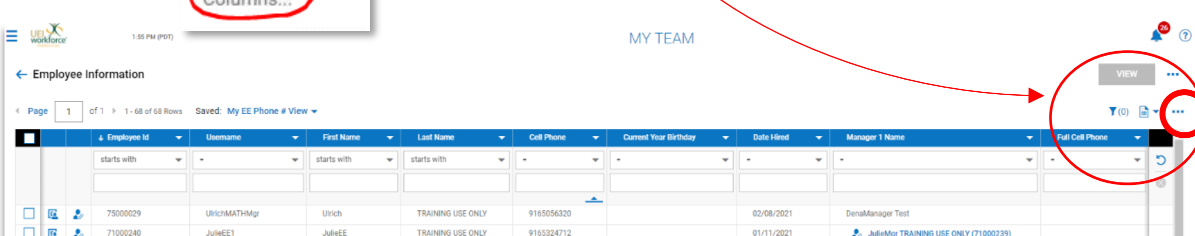
1. Navigate to the **main menu** at the top left of your dashboard.

2. *Within the main menu, select the team view, navigate to **My Team > Employee Information.***

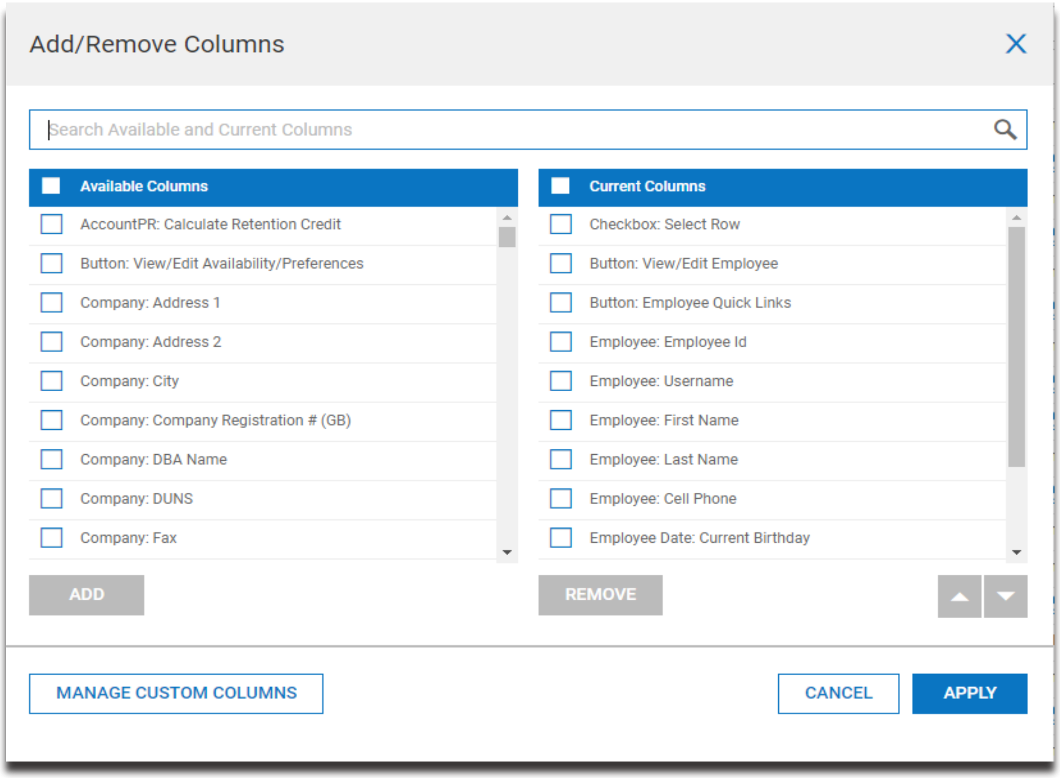




3. Once in the Employee Information page, customize your view by selecting the Actions Menu **(ellipsis)** from the *Actions Menu*, select ***Add/Remove Columns.***

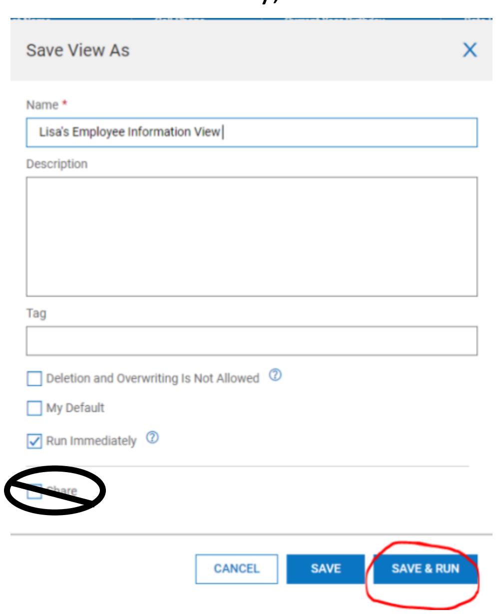


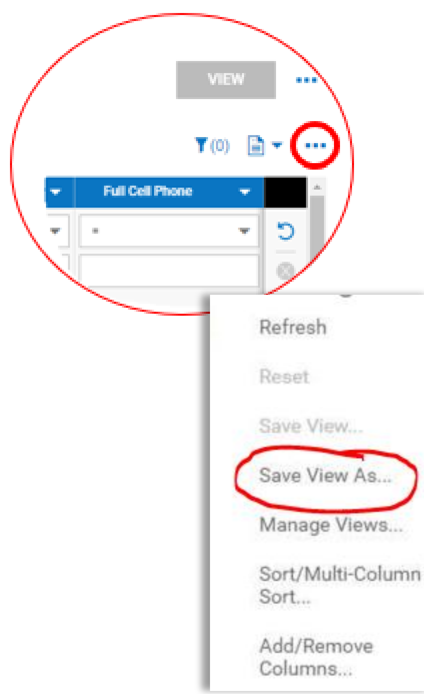
4. In the pop-up below, on the right are the view's current columns. To the left are additional available columns. To add columns, on the left, check the boxes next to the columns you would like to include in your view. Select ***ADD***. To remove columns from your view, on the left, check the boxes next to the columns you would like removed. Then, select ***REMOVE***. Finally, select ***APPLY*** to apply the changes.



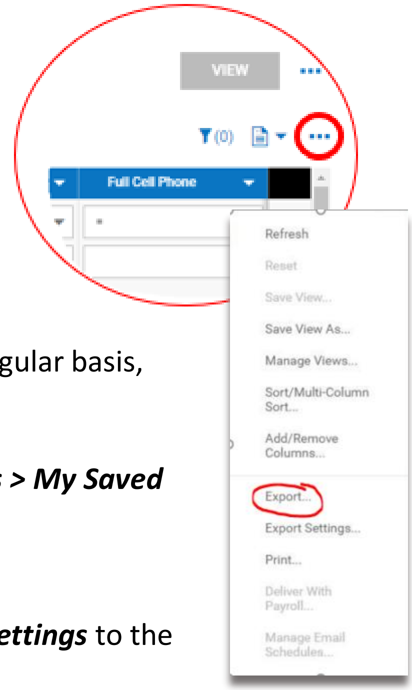
5. To save, from the *Action Menu* (ellipsis), select ***Save View As***. Name the view.

6. In the pop-up, complete the fields as instructed and be sure to select *Run Immediately*. **IMPORTANT**: Do NOT select *Share*. Finally, select ***SAVE & RUN.***



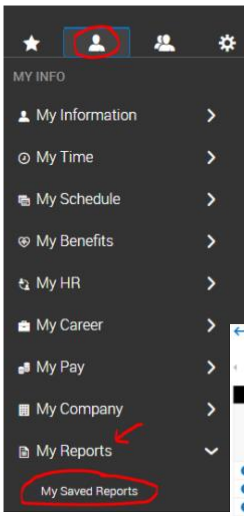


7. To export the view to an Excel document, select ***Export*** from the *Action Menu*.



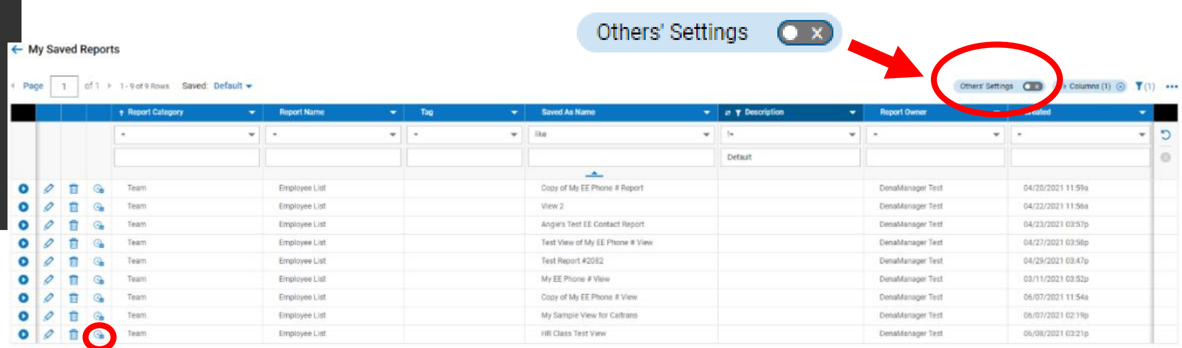
After the view is saved, it is available as a report within ***My Saved Reports***, where it can be scheduled to share with selected employees via email on a regular basis.

To schedule a report to be emailed to select employees on a regular basis, follow the instructions below:



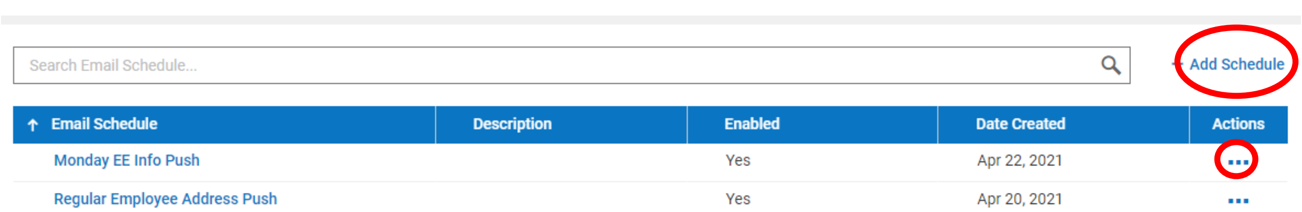
1. From the main menu, navigate to ***Reports > My Saved Reports***.

2. In ***My Saved Reports***, move the ***Others' Settings*** to the left to only display *your* saved reports.



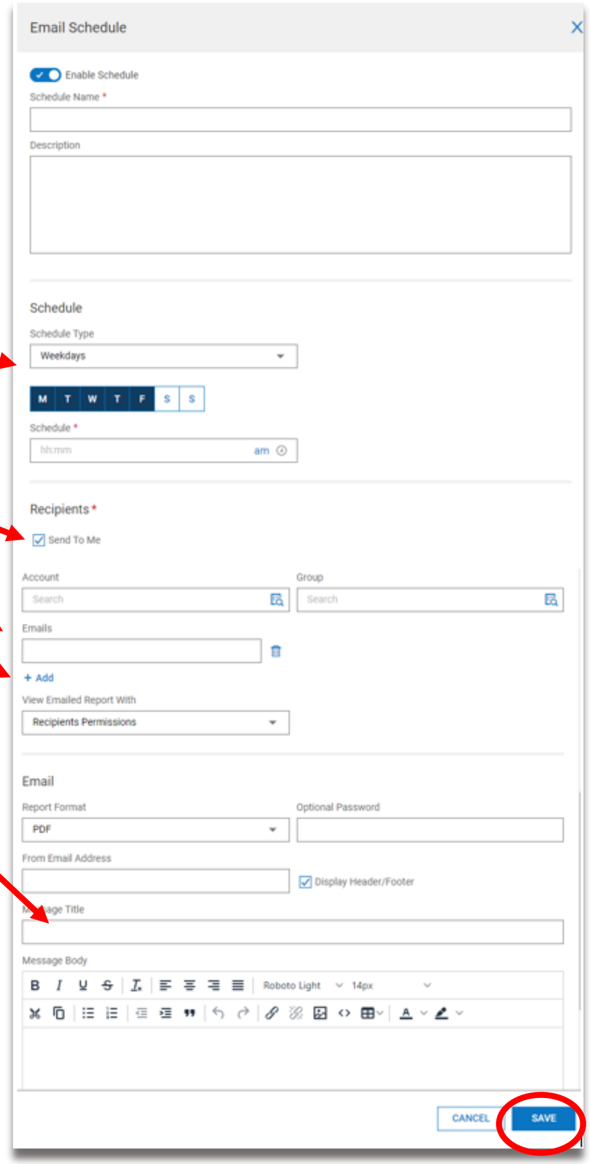
3. Select the  icon to the left of the selected report to create or edit an email schedule.

4. In the pop-up box, select the *Actions Menu* (ellipsis) to edit an existing schedule or create a new schedule by selecting ***+ Add Schedule***.



5. When adding a new email schedule, fill out each field as needed.

- Be sure to select a day/days and time for the email to be delivered.
- Check the ***Send to Me*** box to have the report emailed to yourself.
- Enter the email of the selected recipient.
- To add additional recipients, select ***+Add***.
- You may also choose to enter in an email title and custom message.
- Once completed, select ***SAVE***.



Questions? Contact UEI Human Resources at uei-hr@csus.edu or call (916) 278-7003.