



# Report Builder – User Guide

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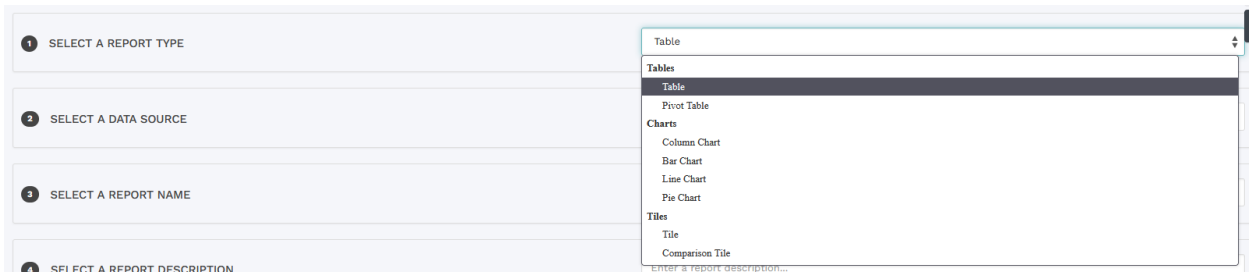
The Report Builder allows you to create, edit and share custom reports – it can be accessed in the left-hand menu of your screen under Reporting > Report Builder.

When you first access the Report Builder, you will need to click the “New Report” button at the bottom left of your screen to start building your first report.

When you do so, you will see a screen like the one below, containing 9 sections:

## Report Type

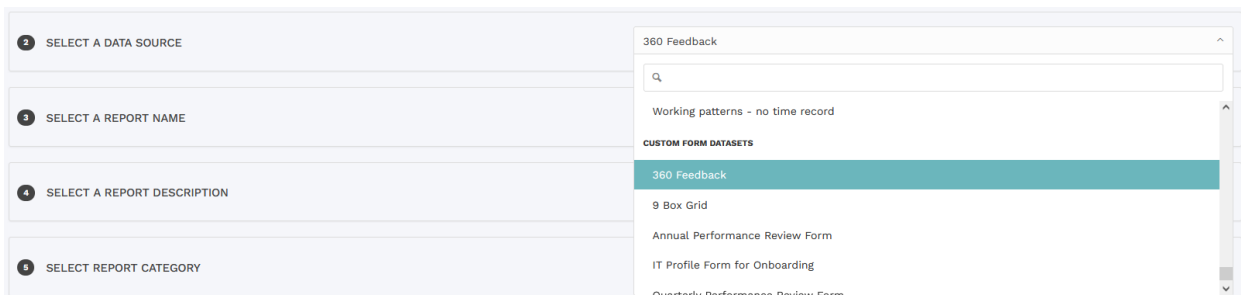
You have the choice to choose either Table, Pivot Table, Column Chart, Bar Chart, Line Chart, Pie Chart, Tile, and Comparison Tile.



## Data Source

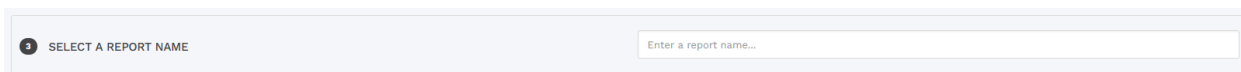
This is the data on which you want to report – for example, employees, expenses, time off, training, and so on. This is sometimes referred to as a dataset.

When you select your data source, the fields in “Select fields” will change accordingly.



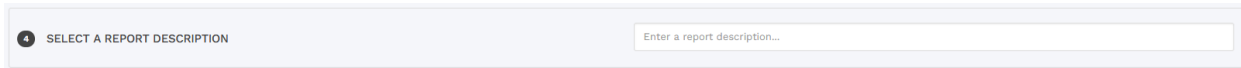
## Report Name

Every report needs a name before it can be created. If you do not enter a name, you will not be able to save the report.



## Report Description

This is not a mandatory field, but you can use it to add additional information about the report.



## Select Fields

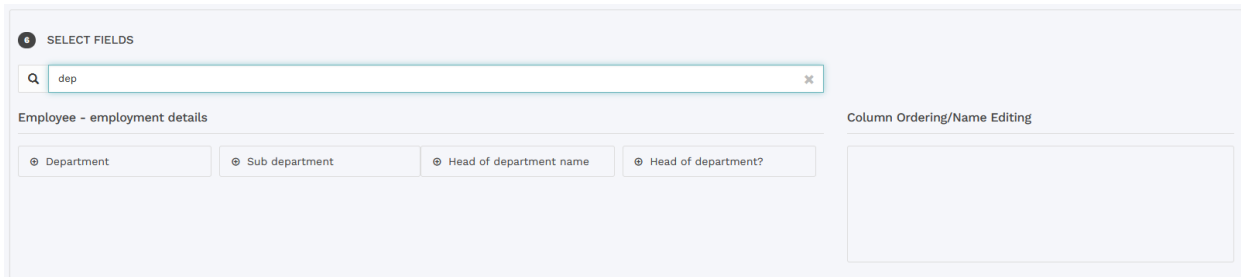
This is the main area of report builder. There are three main areas within this section.

1. Search fields
2. Field list
3. Column ordering / Name editing

### Search fields

Depending on the Data source you choose, there may be fields to choose from and you may not be able to find the field you want to use in your report.

You can search for the field you want. For example, if you want to include Department, but cannot find the field, start typing 'dep' (without the quotes) into the search box, this will then display only those fields which contain the letters 'dep' shown below:



To clear the search, you can either remove the letters or click the “x” to the right of the search box and this will then make all the fields visible again.

### Field List

The field list is where you choose the fields you want to appear in your report. In this example, we have chosen Timeoff requests as our data source. This gives us access to the Timeoff fields (1) and the Employee fields (2) which allows us to then filter and sort based on the employee values as well as those of the timeoff record itself.

**SELECT FIELDS**

Search fields...

**Time off Balances 1**

Type ID	Time off type	Starting balance	Company holidays
Taken	Balance	Booked	True balance
Authorised?	Paid?	Starting balance (YTD)	Balance (YTD)

**Employee - personal details 2**

Employee ID	Works ID	Title	First name
Known as	Pronouns	Middle name	Last name
Full name	Social Security	Address	Address 2
Town	State	Post Code	Country
Skills	Education	Work experience	

**Column Ordering/Name Editing**

To choose a field, you need to click the field in question and it will then appear in the right column under Column Ordering / Name Editing.

**SELECT FIELDS**

Search fields...

**Time off Balances**

Type ID	Time off type	Starting balance	Company holidays
Taken	Balance	Booked	True balance
Authorised?	Paid?	Starting balance (YTD)	Balance (YTD)

**Employee - personal details**

Employee ID	Works ID	Title	First name
Known as	Pronouns	Middle name	Last name
Full name	Social Security	Address	Address 2
Town	State	Post Code	Country
Skills	Education	Work experience	

**Employee - contact details**

**Column Ordering/Name Editing**

- Type ID
- Time off type
- Starting balance
- Works ID
- Title
- First name
- Pronouns
- Middle name
- Last name

**Please Note** – While there is no limit to the number of fields you can select, it is worth remembering that these fields will be displayed horizontally on your report. Therefore, the more fields included, the narrower your columns are, or the report will scroll horizontally.

## Column Ordering / Name Editing

You can change the order of the fields by dragging them to a new position as well as deleting the fields or edit the field name to know how you want it to appear in your report.

### Moving

Moving a field within the selected fields will determine the order the columns are displayed in the end report, click the cross to the left of the field name (1), and drag the field up or down to the new position.

The positioning is important as the ordering of the selected fields will determine the order the columns are displayed in the end report.

### Deleting a selected field

To delete a selected field, click the garbage bin icon (2) to the right hand side of the box containing the selected field and it will be removed from the list.

The screenshot shows a 'SELECT FIELDS' interface with a search bar and three main sections: 'Time off Balances', 'Employee - personal details', and 'Employee - contact details'. Each section contains a grid of fields with selection icons. To the right, a 'Column Ordering/Name Editing' panel displays a list of selected fields. The first field, 'Type ID', has a cross icon (1) on its left and a trash icon (2) on its right. Other fields in the list include 'Time off type', 'Starting balance', 'Works ID', 'Title', 'First name', 'Pronouns', 'Middle name', and 'Last name', each with a trash icon.

### Renaming fields

Occasionally, you may not want to refer to the fields using their default names in your reports – perhaps your company has specific terminology it uses and you would like this to be reflected in the created report.

To rename a selected field, click on the field name enter a new name. You do not need to click save to update the field as this gets changed as soon as you finish typing.

For example, if we want to change Department to Team, it would then look like this:

The screenshot shows a close-up of the field list. The field 'Last name' is highlighted, and a tooltip shows its original name: 'Employee - employment details: Department'. Below it, the field is now named 'Team', demonstrating the renaming process.

## Grouping

Grouping allows you to take a list of data and group rows together based on a common criteria.

For example, in the above report, with no grouping, we would see a list of all employees with their relevant time off.

By using grouping, we can then group the rows together by any of the selected fields – in this instance, we might choose reason, which would then show all records under each reason grouped together in a section with the reason highlighted above each section.

Without any grouping:

Works ID	First name	Last name	Time off start date	Time off end date	AM/PM?	Duration	Reason	Approved?
1084017	Andrej	Nordass	16/08/2021	16/08/2021	All day	1.00	Vacation	Approved
1084018	Dev	McCritchie	24/12/2021	26/12/2021	All day	2.00	Vacation	Approved
1084019	Lorelei	Itzhaki	20/11/2021	22/11/2021	All day	3.00	Vacation	Approved
1084020	Keith	Tomlin	24/10/2021	27/10/2021	All day	4.00	Vacation	Approved
1084021	Gabriell	Asana	22/11/2021	26/11/2021	All day	5.00	Vacation	Pending
1084022	Jewell	Curwen	27/09/2021	27/09/2021	All day	1.00	Vacation	Pending
1084023	Glenn	Heinke	20/09/2021	26/09/2021	All day	7.00	Vacation	Approved
1084024	Dolores	Warren	21/10/2021	21/10/2021	All day	1.00	Vacation	Approved
1084025	Jane	Felderer	16/02/2021	17/02/2021	All day	2.00	Vacation	Approved
1084026	Pavel	Southwell	02/08/2021	04/08/2021	All day	3.00	Vacation	Approved

With a group in “reason”:

Reason: Personal Days								
1084195	Ailis	Vondrasek	19/09/2022	21/09/2022	All day	1.00	Personal Days	Approved
Reason: Vacation								
1084046	Jan	Dumingo	19/05/2021	20/05/2021	All day	2.00	Vacation	Pending
1084028	Iolanthe	Davidzon	27/11/2022	27/11/2022	All day	7.00	Vacation	Approved
1084110	Cathrin	Halt	01/07/2021	03/07/2021	All day	3.00	Vacation	Approved
1084024	Dolores	Warren	04/10/2022	04/10/2022	All day	1.00	Vacation	Approved
1084078	Daria	Cawthera	17/04/2021	22/04/2021	All day	6.00	Vacation	Approved
1084150	Rolph	Marrows	30/12/2022	30/12/2022	All day	4.00	Vacation	Pending
1084049	Josepha	Scopyn	17/05/2021	21/05/2021	All day	5.00	Vacation	Approved
1084025	Jane	Felderer	19/02/2022	19/02/2022	All day	3.00	Vacation	Approved

## Aggregates

An aggregate is simply a value which is made up from calculations on other values. The aggregates that we support are:

- Count – This is the number of instances
- Minimum – This is the minimum value
- Maximum – This is the maximum value
- Sum – This is the total of all the values
- Average – This is the average or mean value

The last four aggregates are only visible if you are applying them against a non-text field – for example, you cannot perform a sum against employee names but you can apply a count.

You can apply an aggregate against a selected field in your report.

When the aggregate is chosen, it will get displayed at the bottom of the chart as shown below:

1084150	Rolph	Marrows	30/12/2022	30/12/2022	All day
1084081	Rosemonde	Aronstein	13/02/2021	14/02/2021	All day
1084494	Pepillo	Meldrum	17/12/2022	17/12/2022	All day
1084049	Josepha	Scopyn	17/05/2021	21/05/2021	All day
<b>COUNT(First name): 216</b>					

## Group and Aggregates Combined

You can use groups and aggregates on their own, but they can also be used together. When you do so, this will change the way they both work.

Works ID	First name	Last name	Time off start date	Time off end date	AM/PM?	Duration	Reason	Approved?
<b>Reason: Personal Days</b>								
1084195	Allis	Vondrasek	19/09/2022	21/09/2022	All day	1.00	Personal Days	Approved
<b>COUNT(First name): 1</b>								
<b>Reason: Vacation</b>								
1084048	Jan	Dumingo	19/05/2021	20/05/2021	All day	2.00	Vacation	Pending
1084028	Iolanthe	Davidzon	27/11/2022	27/11/2022	All day	7.00	Vacation	Approved
1084110	Cathrin	Halt	01/07/2021	03/07/2021	All day	3.00	Vacation	Approved
1084024	Dolores	Warren	04/10/2022	04/10/2022	All day	1.00	Vacation	Approved
1084078	Daria	Cawthera	17/04/2021	22/04/2021	All day	6.00	Vacation	Approved
1084150	Rolph	Marrows	30/12/2022	30/12/2022	All day	4.00	Vacation	Pending
1084081	Rosemonde	Aronstein	13/02/2021	14/02/2021	All day	2.00	Vacation	Pending
1084494	Pepillo	Meldrum	17/12/2022	17/12/2022	All day	7.00	Vacation	Approved
1084049	Josepha	Scopyn	17/05/2021	21/05/2021	All day	5.00	Vacation	Approved
<b>COUNT(First name): 316</b>								

For example, if you wanted to group by reason, and then show a count for your aggregate against the reason, you can do this. The output then changes to show the aggregate against the group, rather than against the whole dataset.

Here you can see that the groups are applied in the same way, but the aggregate now shows against groups rather than against the whole report.

You can add as many aggregates as you need to the report and they can each be different, so you could choose to show the total duration and the count of reasons to get two values from the same dataset.

## Select order by fields

Ordering is simply the ability to control the sort order of the output data.

You can add up to three order elements to each report – the sequencing of these is important as, should a duplicate be detected in the first item (which will happen quite commonly when using things like names), the next selected ordering option will be used to determine which gets displayed next and so on.

Within ordering, you can choose to order either ascending or descending.

Ascending means going from 0 to 9, oldest to newest or A to Z, whilst descending means going from 9 to 0, newest to oldest or Z to A.

## Filtering

The final, and one of the most powerful parts, of the report builder is the ability to add filters to the output data. A filter is a way of refining the result set based on criteria you choose.

For example, you might want to show all sickness for the last month, so you would add a filter for time off reason equals sickness, and the start date of the time off in the last month. This allows you to then only see the records which match those criteria.

When adding filters, you can add as many filters as you like – the filters are NOT limited to the fields chosen on the report. For example, in the report from above, we could choose to filter where the employee site was head office, even though we had not actually chosen employee site as a selected field.

To add a new filter, click the plus icon within the “dotted” rectangle, which then will display a drop down where you can search for the field in question.



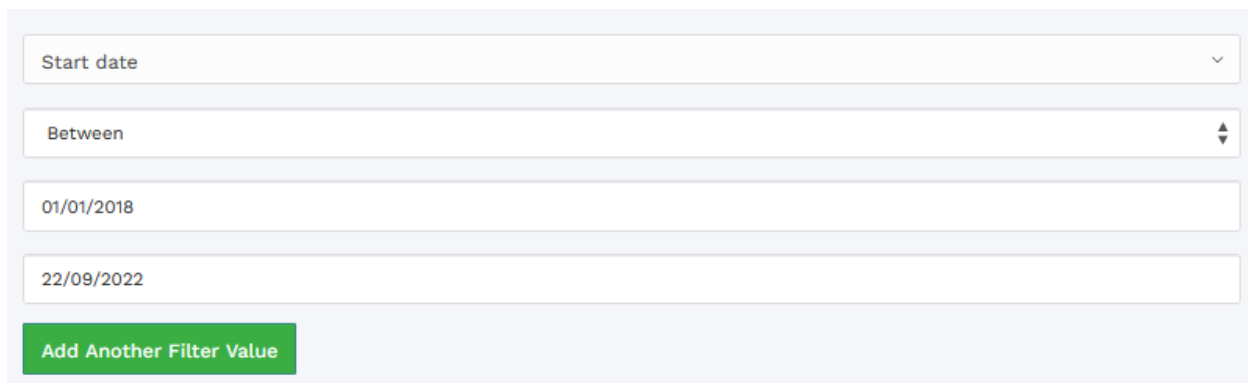


Once you choose your field you then need to choose the type of filter you want to apply. The actual options will vary according to the field you choose but the options are:

- All fields:
  - Equals
  - Not equals
- Text fields only:
  - Begins with
  - Doesn't begin with
  - Ends with
  - Doesn't end with
  - Contains
  - Doesn't contain
  - Is empty
- Numbers and Dates (absolute) only
  - Between
  - Greater than
  - Greater than or equal to
  - Less than
  - Less than or equal to
  - Is empty
- Dates (relative) only
  - Next x days/weeks/months/years
  - Previous x days/weeks/months/years
  - Next day/week/month/year
  - Previous day/week/month/year

When you choose the filter type, you will then be presented with a value box where you need to enter or choose the actual filter value.

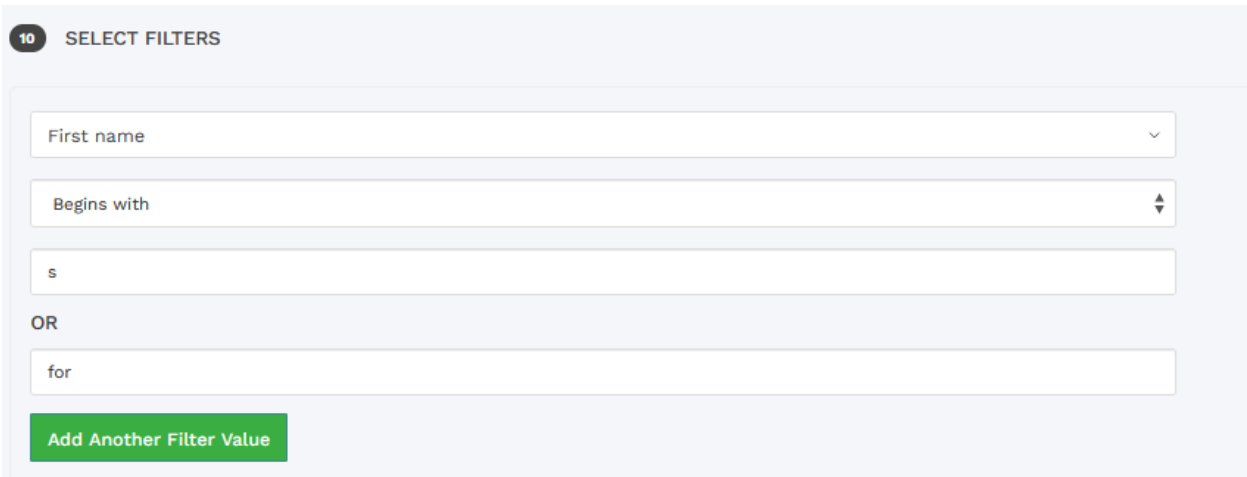
For absolute date options, you will be shown a data picker which will allow you to choose your specific date or dates.



The screenshot shows a filter configuration interface with the following elements:

- A dropdown menu with "Start date" selected and a downward arrow.
- A dropdown menu with "Between" selected and a double-headed arrow.
- A text input field containing "01/01/2018".
- A text input field containing "22/09/2022".
- A green button labeled "Add Another Filter Value".

When selecting text fields, you can choose to search within the actual data rather than matching the whole data value – so you could choose, for example, to show all employees whose surname contains the letters “for” or all employees whose name begin with “s” and so on.



Finally, for all data types, you can choose equals to or not equals to.

When entering text fields (such as someone’s name) and numbers, you will be asked to enter the actual value you want to check for. For dates, you will be shown the date picker to choose your data.

For other text fields (referred to as lookups) such as department, job title, manager, and so on, you will instead be given the chance to choose from the actual options in the system making it much easier to search without needing to remember all the possible options. The process works exactly the same way when using does not equal for these fields.

### Adding multiple filters

If you wish to add multiple filters to a report, you can do so by clicking the plus inside the dotted rectangle as many times as you need:

In the above example, the request would read “Show me all fields in time off where site equals Montreal with a start date is between May 17, 2020 to May 19, 2020 and reason results in vacation.”

10 SELECT FILTERS

Site

Equals

Montreal x

AND | OR GROUP FILTERS

Start date

Between

01/01/2020

22/09/2022

Add Another Filter Value

AND | OR GROUP FILTERS

Reason

Equals

Vacation x

Each time you add another new filter group, it will add another “and” to the inquiry logic. However, sometimes, you might want to use an “or” instead of an “and”.

For example, the request would read “Some me all the fields in time off where site equals Montreal with a start date is between May 17, 2020 to May 29, 2020 and reasons results in vacation or carryover.”

10 SELECT FILTERS

Site

Equals

Montreal

AND | OR GROUP FILTERS

Start date

Between

01/01/2020

22/09/2022

AND | OR GROUP FILTERS

Reason

Equals

Vacation  Carryover

Within a multiple select box for a lookup value, each of the values equate to an OR within that group.

For other data types such as text, numbers and dates there is an additional option below the value box for “Add Another Filter Value” – this works similarly to the multiple select box whereby each added filter value is treated like an OR. The below shows an example of this.

Start date

Between

01/01/2020

28/02/2020

OR

03/01/2022

28/02/2022

## Invalid filters

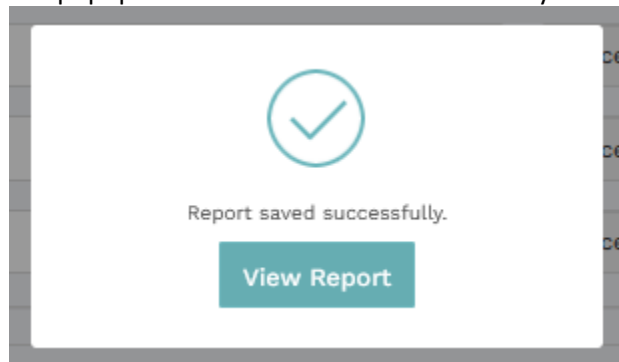
It is possible to create invalid filter combinations, and this is something you should be cautious of.

The most commonly encountered invalid filter is where you have two AND filters applied where one makes the other no longer valid. For example, if you had a time off type called sickness and it was unauthorized time off, but you created a filter like below, it would be “invalid” as that filter could never be true.

Likewise, if you choose to apply a filter against the same field twice, this would be invalid as it is not possible for time off record to have a reason of sickness and bereavement as it is a single value.

## Saving and viewing reports

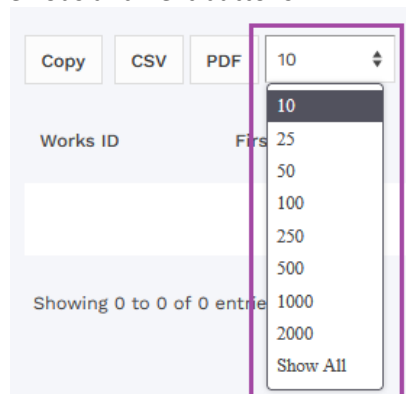
Once you have built your report and added your groups, filters and so on, you need to then save the report by clicking the green Save report (or Edit report) button at the bottom left of the screen. If this is successful, you will then see a popup which contains a button to allow you to view your data.



## Pagination

Once you have built and saved your report, it will then be displayed to you. When the report first loads it will load 10 rows per page. You can change this by clicking the dropdown to the top of the screen containing numbers so show 10,25,50,100,250,500,1000,2000 and show all.

Additionally if you want to simple jump to another page, you can use the page numbering at the bottom right of the screen as well as the previous and next buttons.

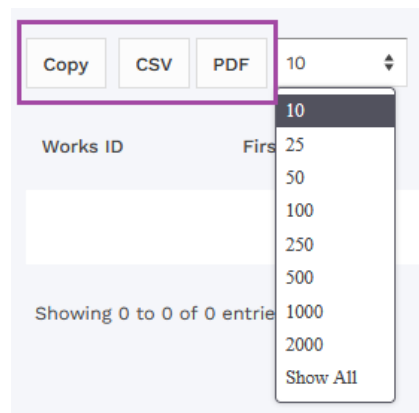


*Please Note – If you have a very large report and you choose to use “Show all” or even 1000/2000 rows per page, you will suffer a delay as your browser will need to draw all the rows on the screen. Depending on your computer or browser, this may cause your browser to crash. Please use with caution.*

## Exporting

You can export the data either to your clipboard (copy) or to CSV or PDF using the buttons at the top right of the screen.

*Please Note – Exporting will only export the current visible rows, so you may need to change to number of displayed rows if you wish to export these all to one file.*



Additionally, if you choose PDF and have a very wide report, it may get cut off during the export as there is physically not enough space to fit all the columns into the page size.

## Permissions

As an administrator, you will have access to all data sources and all fields within those data sources within the report builder. However, for other user groups you may not want them to have that same access. Giving report builder access below is done at a user group level - this means if you give access to a data source (dataset) to a user group then ALL users of that user group can then access that data source. In the case of a manager, for example, they would only see their employees but they will still see and be able to report on the data source none the less.

To give access to a data source, go to Administration > Company > Report builder permissions.

For example, you may choose to give Managers access to a Time off request report.

When HR or manager level users access reporting (again either to build or share) they will not be able to access any fields which they do not have permissions to view.

In the Manager column, select the data source the report is based on, in this case it is the Time off requests, and then click on 'Submit'.

### Report builder permissions

**▲** Giving report builder access below is done at a user group level - this means if you give access to a dataset to a user group then ALL users of that user group can then access that dataset. In the case of a manager, for example, they would only see their employees but they will still see and be able to report on the dataset none the less.

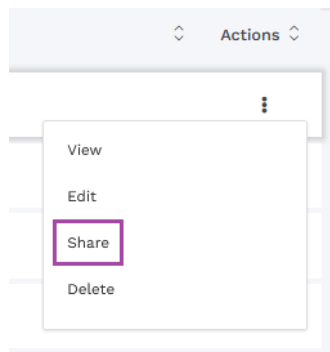
Dataset      HR      Manager      Finance      Recruitment      Trainer      Facilities      Approver

Time off requests                                         

At this point we have only given permissions to Managers to view any reports based on this data source, however the Managers will not yet be able to view the report. We also need to share the actual report.

## Sharing

When you create a new report in report builder, you are the only person who can access that report. To do so, simply go to Reporting > Report builder and find the report you want to share then click on the 'Share' icon for that report.



Here you will see the permissions screen for this report. Permissions (sharing) means you still keep just one copy of your report but multiple people can access the report. You can choose to give those people (or user groups) either view access or editor access or a combination of both. For example, you might want to allow your managers to view the report but then allow any administrators to edit the report.

### Permissions

This section allows you to set the permissions on this report. Adding someone to the viewers or editors section will give that employee the permissions to view this report, however they will still only be able to see data relating to themselves. Adding someone as an editor, not only gives view permissions, but also allows them to edit the report. As these permissions are given on the original report, any changes to the report made by yourself, or an editor, will be seen by yourself and all of the viewers/editors. If you would like the employee to have their own copy of the report, please use the form below this one **(Copy/Duplicate)**.

**Please note:** if an employee/group has view permissions, and they are then added as an editor, they will be removed from the viewers section due to them having the view permissions from being an editor.

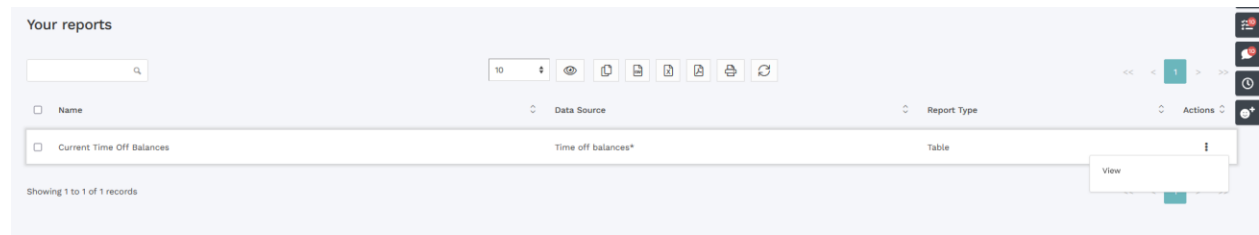
#### Viewers

Managers x

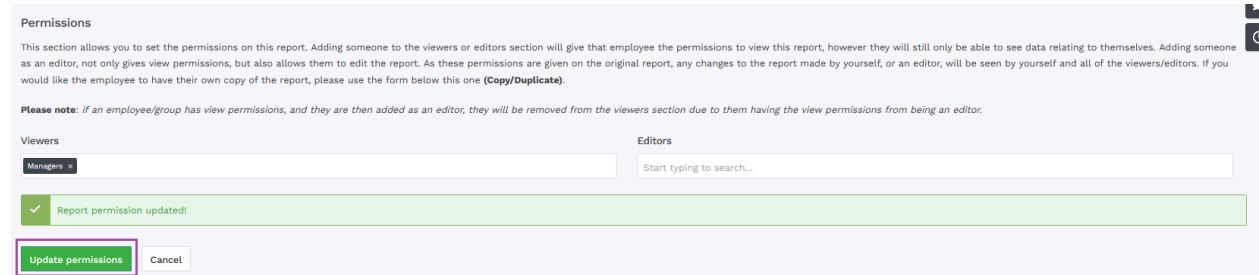
#### Editors

HR x

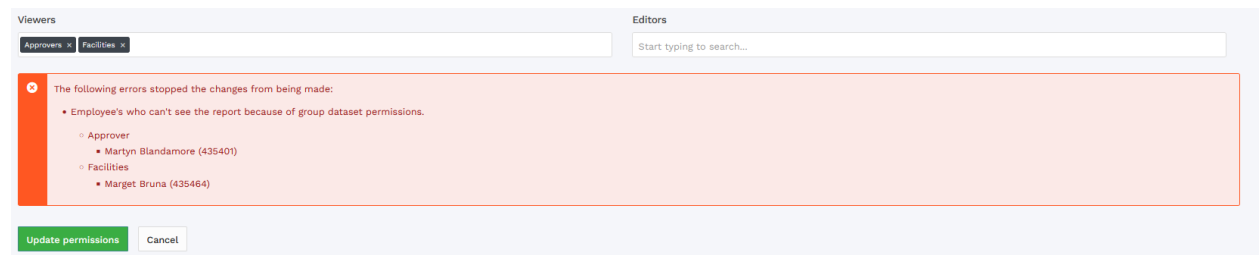
In this example, managers will be able to view your report but will not be able to edit, delete or share the report but administrators will be able to edit and delete. Any change they make will then be reflected to allow those who are accessing that shared report. The manager would see something like below, with only the ability to view the report.



After adding the user group or individual as a Viewer, click on 'Update permissions' and you will see the Report permission updated! banner.



If you try to share a report where any of the recipients are not allowed to view that data source you will get an error as they would never be able to see that report, in this case you will need to return to the Report builder permissions option and add the user group you want to share the report with:



In this instance, we are trying to share the report to the managers, but managers do not have access to the dataset, so this prevented.

If the people you are sharing the report with have access to the dataset but field restrictions, then how this is dealt with depends on the restricted field or fields that are used within the report context.

For example, if you are sharing a report with managers and that report has the field salary included but managers are not able to view this, you will still be able to share the report but the manager will not see those restricted fields when they view the report.



### Admin View:

Works ID	First name	Last name	Type	Starting balance	Taken	Balance	Booked	True balance	Authorised?	Paid?	Site	Department	Sub department
1084058	Mike	Dewan	Vacation	20.00	0.00	20.00	7.00	13.00	Unauthorised	Paid	Toronto	Marketing	Not found.
1084194	Martyn	Blandamore	Vacation	30.00	0.00	30.00	0.00	30.00	Unauthorised	Paid	Boston	Finance	Not found.
1084257	Marget	Bruna	Vacation	20.00	0.00	20.00	0.00	20.00	Unauthorised	Paid	Toronto	Operations	Not found.
1084285	Jeanine	Barstock	Vacation	20.00	0.00	20.00	0.00	20.00	Unauthorised	Paid	Montreal	Operations	Not found.
1084295	Herold	Shackle	Vacation	30.00	0.00	30.00	0.00	30.00	Unauthorised	Paid	Quebec	Accounting	Not found.
1084301	Amy	Adams	Vacation	25.00	9.00	16.00	2.00	14.00	Unauthorised	Paid	Toronto	Accounting	Not found.
1084351	Sheridan	Banton	Vacation	20.00	0.00	20.00	0.00	20.00	Unauthorised	Paid	Montreal	Research and Development	Not found.
1084488	Emylee	Eager	Vacation	30.00	0.00	30.00	0.00	30.00	Unauthorised	Paid	Montreal	Technology	Not found.
1084499	Sharlene	Woodnutt	Vacation	20.00	0.00	20.00	0.00	20.00	Unauthorised	Paid	Toronto	Research and Development	Not found.

### Manager viewing the same report:

Works ID	First name	Last name	Type	Starting balance	Taken	Balance	Booked	True balance	Authorised?	Paid?	Site	Department	Sub department
1084295	Herold	Shackle	Vacation	30.00	0.00	30.00	0.00	30.00	Unauthorised	Paid	Quebec	Accounting	Not found.
1084301	Amy	Adams	Vacation	25.00	9.00	16.00	2.00	14.00	Unauthorised	Paid	Toronto	Accounting	Not found.

Showing 1 to 2 of 2 entries

As well as being able to see that the manager cannot see the restricted fields (date of birth, home email and pay), this also shows that the manager is only seeing 6 rows where the admin is seeing 21. The manager only see those employees to whom they have permission to do so.

The other scenario when sharing reports with restricted fields is when the restricted field is user for a group, aggregate, sort, or filter. In this instance, you will not be able to share the report at all as, doing so, would be meaningless as the report would lose all context.

For example, the same manager above who is not allowed to see salary- if you modified your report to add a filter where salary is greater than 20,000 then you cannot share this as the report without the filter is not serving the original purpose. In this case, you will get an error when you come to share:

If the manager already had access to the report before you added the salary filter, when they come to try and view the report, they will get an error in their copy of the report.

