



The Employees ReportBuilder

AWARDS INSTRUCTION SHEET

The AWARDS Employees ReportBuilder feature, located in the Human Resources module, is a powerful reporting tool that can be used to generate user-customized employee data reports. When working with the Employees ReportBuilder tool, users have the ability to:

<ul style="list-style-type: none">▪ Create reports that include data for employee characteristics entered in a variety of places.	<ul style="list-style-type: none">▪ Filter report contents by one or more selected employee characteristics.
<ul style="list-style-type: none">▪ Include either individual detail or aggregate counts of each employee characteristic selected.	<ul style="list-style-type: none">▪ Sort and group report data by various employee characteristics.
<ul style="list-style-type: none">▪ Save frequently generated reports so that they can be easily re-run in the future.	<ul style="list-style-type: none">▪ Run reports for any date range.

Permissions required to run an Employees ReportBuilder report are as follows:

- **DATA ENTRY / ACCESS** – You must have the “Display Executive Administration Buttons” and one of the three human resources permissions in order to access the Human Resources module in which the ReportBuilder is located.

Which of the three HR permissions you have impacts the amount of data you will have access to within the ReportBuilder; specifically, users with “HR Data Full Access” or “HR Data Read Only” permissions will have access to data for all employees, while users with the “HR Data Work Supervisees” permission will have access to data for employees in their work supervisory trees only.

Please keep in mind that in multi-agency, HMIS, and single-agency divisional databases the amount of data users see using the ReportBuilder is limited not only by permission but also by agency/division. Continuum staff can view data for all agencies, while all other users can only view data for their own agency (as assigned in the Human Resources module Staff Information feature).


ABOUT THIS DOCUMENT

This document is intended to guide you through the process of using the Employees ReportBuilder feature to complete common report generation tasks. Specific topics covered are:

- **Generating a New Report** – Learn to generate a new Employees ReportBuilder report step-by-step. Page **1**
- **Understanding Employees ReportBuilder Options** – Learn how to customize a report. Page **5**
- **Viewing or Updating an Existing ReportBuilder Report** – Learn to view or change a saved report. Page **10**
- **Frequently Asked Questions** – Learn the answers to common Employees ReportBuilder questions. Page **14**

GENERATING A NEW REPORT

To create and save an Employees ReportBuilder report that can be re-run in the future, or to generate a single-use report, complete the following steps:

1. From the *AWARDS Opening Menu* page, click **Human Resources**. The *Human Resources Menu* page is displayed.
2. Click **Employees ReportBuilder**. The *Report Settings* page is displayed. 

This page contains date range fields, as well as a list of any saved report formats to which you have access.



3. By default the report looks for employees with active payroll records as of today's date. In the **Employee Date Range: From** and **To** fields, make changes to that default date range as necessary (using mm/dd/yyyy format). If a range of dates is specified the report will look for any employees with active payroll records at any point during that date range.

In this context payroll records are "Payroll Group Status History Records" as entered using the Human Resource module's Staff Information or Payroll Status features. An active payroll record means that the start or end date of the employee's payroll group status history overlaps with the report period at some point.

4. Leave the **Select a saved report format:** drop-down selection blank to generate a new report.

To view an existing report for which a format was previously saved, see "Viewing or Updating an Existing ReportBuilder Report" on page 10.

5. Click **CONTINUE**. The *Report Options* page is displayed. 



This page contains an alphabetical list of employee characteristic check boxes representing data collected in several AWARDS locations:

Staff Information	Credentialing	Payroll Status	Work Schedules
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Several other characteristics which are not necessarily found on the above forms are also available; for example "Age," "Seniority Start Date," "Termination Date," and "Seniority."

6. If a range of dates was specified in step 3, it may be the case that an employee has multiple payroll records during that time period. In such instances, duplicate report records may result. To filter out those duplicates

and to list each employee only once in the report results with data from the most recent payroll record in the report date range, click the **Unduplicated Count** check box.

7. Click the check box next to each employee characteristic for which data is to be included in the report.

Employee characteristics with an asterisk () next to them are those for which one employee may have multiple values. Multiple value fields include those that have check boxes for data entry where multiple boxes may be checked for each employee, as well as instances where multiple records may have been entered for an employee, such as worksite detail in work schedules.*

8. Click **CONTINUE**. The *Report Options – Continued* page is displayed.
9. Configure the options in the “Filter Options” portion of the page as necessary to adjust the scope of the report contents, and set the “Show Individual Detail” and/or “Summary Tables” options to adjust the way in which the contents are displayed.

Individual detail report options and/or summary table selections must be set before the report can be generated. For more information on using the various ReportBuilder report options, see “Understanding Employees ReportBuilder Options” on page 5.

10. To save the report settings so that this employee report can be easily re-run in the future, click **SAVE REPORT FORMAT**. The *Save Report Format* dialog box is displayed. →

If it is not necessary to save the report format and you wish only to view the report contents, please skip to step 14.

11. In the **Report Format Title** field, type the name of the report.

We recommend that the title used be indicative of the report contents so that it is easily identifiable when selecting the format for the purposes of running the report in the future.

12. Click one of the available **Save Report Format for** radio buttons to determine who the report should be accessible by. Available options are:

- **Yourself** – When this option is selected, only the user saving the report format has the ability to use or modify that format.
- **All Staff** – When this option is selected, all staff have the ability to view the report; however, only you and other individuals with the ability to save reports for all staff will be able to modify or delete that format.

In a single-agency AWARDS database, only members of the “System Administrator” and “Executive Officer” user groups have the ability to save report formats to be used by others. In a multi-agency/HMIS AWARDS database, the option to save reports for other users is available to the “System Administrator,” “CoC Executive Officer,” “CoC Executive Support Staff,” and “Agency Executive Officer” user groups. People who are not members of the specified user groups can only save report formats for themselves.

13. Click **Save Report Format**. The report format is saved and the *Report Options – Continued* page is re-displayed.
14. Click **DISPLAY REPORT**. The report is generated and displayed on the *Employees ReportBuilder* page.

When working with the report data, please keep in mind that:

- The report shows the values for each characteristic as of the date on which the report is generated. For example, if an employee's marital status on his or her date of hire was "Married," but it has since changed to "Divorced," the report shows him or her as divorced, even when the report is run with the date range set to include the employee's hire date.
- When the report includes multiple value characteristics (those with an asterisk next to them on the initial Report Options page), the individual detail for each employee includes a list of the characteristic values separated by commas. Additionally, because each employee may have more than one value, the summary table totals information for any multiple value characteristic may not add up to the total number of employees.
- When a report is long enough to require you to scroll down the page to view all of its content, the header row of the data table (individual detail and/or summary) "freezes" at the top of the page, while the rest of the report detail is viewed. This enables you to view the column labels, even when scrolling down the page. Similarly, when printing a report that covers more than one page, the header row of any tables split between pages is shown at the top of each page.

15. Once the report is displayed, complete any of the following tasks as needed:

- **Show/hide individual detail or summary table content** – In some cases you may have chosen to include an employee characteristic in the report for filtering or grouping purposes, but do not necessarily want to see the associated individual detail. Likewise, you may choose to include percentages or totals for summary tables but not want that information shown for all of those tables. In such instances, you can adjust which table columns are displayed on the report page, as well as whether individual detail is shown or hidden. To do so, click the show/hide icon to the left of the table you would like to alter. The *Column/Row Display* pop-up for that table is displayed. Check or uncheck columns for that table as needed, and/or uncheck the row display "Details" option to hide individual detail completely (leaving only "grouped on" data/cells and subtotal footer rows, if applicable). Checked columns/rows are displayed, unchecked are hidden.



The option to hide individual detail rows is only available when grouped on/footer options have been selected under "Individual Detail" on the Report Options – Continued page.

Showing/hiding columns and/or rows of individual detail or summary tables does not impact the contents of the Excel File version of the report data. Additionally, the show/hide icon is not included in print versions of the report.

- **Sort individual detail or summary table contents** – Click the heading of any table column to sort the table contents by that characteristic. Click that heading again to reverse the sort order. To sort by a secondary characteristic, press <SHIFT> and click on the second column heading.

When "Grouped On" has been selected as an individual detail option under report settings, sorting is NOT available.

When sorting is used, an ↑ or ↓ arrow next to a column heading indicates that the table data is being sorted using that column. The direction of the arrow indicates whether the sorting is in ascending (↓) or descending (↑) order. In this example, the table is being sorted alphabetically by employee name from A to Z.



Changing the sort order of an individual detail or summary table does not impact the contents of the Excel File version of the report data.

- **Print the report** – To do so, click **File** on the Internet browser's menu bar and select **Print**. Adjust the printer settings as necessary, and then click **Print** to complete the printing process.
- **Export the contents to Microsoft Excel** – To do so, click the **Excel File** link at the top of the page.
- **Save the format of the report for future use if you have not already done so** – To do so, click the Internet browser's **Back** button to return to the *Report Options – Continued* page, and then complete steps 10 through 14 above.

The process of generating a new Employees ReportBuilder report is now complete.

UNDERSTANDING EMPLOYEES REPORTBUILDER OPTIONS

When generating an employee report, several report options are available for the purposes of customizing the report contents and the way in which those contents are displayed. Each of these options, set on the *Report Options – Continued* page, is explained in detail below.

FILTER OPTIONS

The ReportBuilder filter options are located at the top of the *Report Options – Continued* page. →

These filters enable users to adjust the scope of report contents by applying user-specified criteria to the employee characteristics chosen on the initial *Report Options* page.

Filters are applied to the report contents regardless of whether those contents are displayed using the individual detail report options, summary tables, or both. For more information on individual detail and summary tables, please see the corresponding sections in the pages that follow.

To use the ReportBuilder report filters, complete the following steps:

1. In the first filter options row, click the drop-down arrow in the left-hand column and select the employee characteristic with which the report contents are to be filtered.

The drop-down lists in this column are populated with the employee characteristics selected on the previous Report Options page.

2. Click the corresponding drop-down arrow in the middle column and select the type of filter to be used:

Equals	Not Equal to	Greater than
Greater than or Equal to	Less than	Less than or Equal to
Contains	Does not Contain	Is Blank
Is not Blank	Between	

3. In the corresponding field(s) to the right of the filter selection, type the filter criteria. For example, if "Seniority" was selected as one of the characteristics to be included in the report and the report contents should contain only employees with one or more years of seniority, the filter options would be set as shown here. →

In most instances AWARDS completes logic checks to ensure that the filter criteria entered are logical; however, those checks are not performed when "Between" is selected as the filter type.

Report filters are not case sensitive when entering text; however, when entering dates you should always use the format mm/dd/yyyy.

4. To combine multiple filters to further refine the report results, click the **and** or **or** radio button. For example, if "Age" and "Seniority" were selected as characteristics to be included in the report, and the report contents should contain only employees with an age of 21 years or older who have at least one year of seniority, the filter options would be set as shown here. →

It is not possible to combine "and" and "or" filters. As a result, the filter combination selection made in this step applies to all of the filter options set for the report.

5. When initially setting the filter options, up to four filters can be added. If it is necessary to add more, click the **Add Additional Filter** link. Using that link, four additional filters can be added, up to a total of eight.

The process of setting the ReportBuilder filter options is now complete.

INDIVIDUAL DETAIL OPTIONS

The ReportBuilder individual detail options are located in the middle of the *Report Options – Continued* page. →

These options enable users to adjust the way in which report contents are displayed. Specifically, when the report content is displayed with individual detail, the report includes a column for each characteristic data field and a row for each employee record (after filters are applied, if applicable). The total employee count is also displayed beneath the report table.

Once you choose to include individual detail in the report, you can apply sort options to control the order in which the rows of data are displayed, and field options to control the order in which the columns of data are displayed.

The individual detail report options can be used alone, or in combination with the summary table report options described under "Summary Table Options" on page 8. If the individual detail report options are not used, summary table selections must be made before the report can be generated.

To use the ReportBuilder individual detail options, complete the following steps:

1. Click the **Show Individual Detail** check box. The *Report Options – Continued* page is refreshed to display additional individual detail options.

2. If the rows of report data should be numbered, click the **With Record Numbers** check box.

This check box and the other individual detail table-related options mentioned in the steps that follow are not available on the Report Options – Continued page until step 1 has been completed.

3. To sort the rows of individual detail by one of the employee characteristics chosen on the previous page, click the **Sort By** drop-down arrow and select that characteristic.

The sort by drop-down lists are populated with the employee characteristics selected on the previous Report Options page.

4. Click the corresponding **Order** drop-down arrow and indicate whether the sort is to be ascending ("A-Z") or descending ("Z-A").

5. If report data should also be grouped by the variable selected in step 3, check the corresponding **Grouped On** check box. When checked, any records included in the report that contain like data for this variable are displayed together, with the variable itself listed once per value and occupying the left-most column.

When this option is used, sorting the report with the column headers of the actual data tables is unavailable.

6. To include subtotal rows of data for each "grouped on" variable, click the corresponding **Footer** check box. Click the **Footer Options** button that is then displayed to view the *Footer Options* box.

7. Click the check box next to available count and/or sum options as needed.

- **Count** - When checked a count of records is displayed as a footer beneath each grouped value.
- **Sum** – Available for numeric or currency variables only. When checked, a sum of grouped variables is included.

Sum and count options can be used individually or in combination. When all necessary selections have been made, click **Close**.

Selecting the "Footer" option WITHOUT specifying related count and/or sum selections results in a blank row beneath each group in the report. This can be used to help visually separate each of the grouped on values.

8. Repeat steps 3 through 7 as needed for a total of up to four sort by selections.

If fewer than four employee characteristics were chosen on the Report Options page, the number of available sort by options equals the number of selected characteristics.

9. When the report contains numeric variables for which summary data would provide meaningful results, click the **Show report footer** check box. Click the **Report Footer Options** button that is then displayed to view the *Footer Options* box.

10. Click the check box next to available sum options as needed. When checked, variables for which a sum has been included are totaled at the bottom of the report.

When all necessary selections have been made, click **Close**.

11. To adjust the order of the columns of individual detail in the report contents, click a characteristic in the "Field Display Order" portion of the page to highlight it.

If more than eight employee characteristics were chosen on the Report Options page, the "Field Display Order" portion of the page is not automatically populated with the employee characteristics. To view the

characteristics list so that the order of the columns can be adjusted, click **Show Ordered Field List** before completing this step.

Please keep in mind that if the "Grouped On" option has been used for one or more of the "Sort By" variables, those variables are automatically displayed as the first columns in the table, regardless of what is specified here.

- Use the up and down arrow icons to the right of the "Field Display Order" section to move the highlighted characteristic up or down in the list, or drag and drop the characteristic to the desired list position.

The field display order listed from top to bottom here is reflected in the report data columns display from left to right.

- Repeat steps 11 and 12 as needed.

The process of setting the individual detail report options is now complete.

SUMMARY TABLE OPTIONS

The ReportBuilder summary table options are located at the bottom of the *Report Options – Continued* page. →

These options enable users to include aggregate counts of selected employee characteristics. They also allow for customization of how those counts are displayed, and the types of information included.

The summary table report options can be used alone, or in combination with the individual detail report options described under "Individual Detail Options" on page 6. If the summary table report options are not used, individual detail selections must be made before the report can be generated.

The screenshot shows the "Summary Tables" section of the ReportBuilder interface. At the top, there is a "Summary Tables:" header with a checked "Check All" checkbox. Below this, a note states "Fields with a * are multiple value fields to which the grouping options do not apply". Two checkboxes, "Age" and "Seniority", are both checked. The "Summary Tables Options" section contains four unchecked checkboxes: "Show each row's total", "Show each row's percentage", "Show each column's total", and "Show each column's percentage". Below these are "Grouped by:" dropdowns for "1." and "2.". The "Grouping Levels Display:" section has a "Columns" dropdown. At the bottom, the "Summary Tables Display Order" section includes a note "Select the field and click the up or down arrow to change the order of the summary tables in this list." and a "Show Summary Tables Display Order" button.

To use the ReportBuilder summary table options, complete the following steps:

- To include summary data / aggregate data in the report contents for one or more employee characteristics, click the corresponding check boxes in the "Summary Tables" portion of the page, or click the **Check All** check box to select all characteristics. The report contents will include a separate summary table for each selected characteristic, with aggregate counts of each.

For example, if "US Citizen" and "Country" are selected as summary table options and the report is generated, the report contents will include a separate summary table for each, with aggregate counts of each characteristic as shown here. →

The summary tables check boxes list is composed of the employee characteristics selected on the previous Report Options page; however, several characteristic data fields are not available for selection as part of a summary table, regardless of whether they were selected on the previous page. These characteristics – such as name, date of birth, social security number, employee ID, street address, phone number, and so on –

Record Count: 352

COUNTRY ↓	Count
-No Data-	34
Ecuador	1
Grenada	1
Guyana	1
Jamaica	1
Thailand	1
Trinidad and Tobago	1
USA	312

US CITIZEN ↓	Count
-No Data-	34
no	6
yes	312

are excluded because they have values that are unique to each employee, and are unlikely to generate any meaningful summary data.

- To total each column and/or row in the summary table, click the **Show each column's total** check box and/or **Show each row's total** check box, respectively.

These "total" check boxes and the other summary table-related options mentioned in the steps that follow are not available on the Report Options – Continued page until one or more summary tables are chosen in step 1.

- To include in the summary table the percentage of employees out of the total employee count that have the data in each column or row, click the **Show each column's percentage** check box and/or **Show each row's percentage** check box, respectively.
- To group the summary table information by a selected characteristic, click the first **Grouped By** drop-down arrow and select the characteristic by which the summary table report results are to be grouped.

For example, if a report is generated with the "US citizen" summary table option checked and with "Country" as the Grouped By selection, the report contents will appear as shown here. →

Record Count: 352								
US CITIZEN ↓	COUNTRY							
-No Data-	Ecuador	Grenada	Guyana	Jamaica	Thailand	Trinidad and Tobago	USA	
-No Data-	34	0	0	0	0	0	0	0
no	0	1	1	1	1	1	1	0
yes	0	0	0	0	0	0	0	312

Multiple value fields (noted with an asterisk) cannot be selected as the characteristic used for grouping.

The grouping options described here in steps 4, 5, and 6 are only applicable when more than one summary table is available for inclusion in the report.

- To group the summary table information by a second characteristic as well, click the second **Grouped By** drop-down arrow and select that characteristic. When a second grouping selection is made, subgroups are created under the primary grouping level in the report contents.

For example, if a report is generated with the "Country" summary table option checked, "US Citizen" as the primary grouping, and "Gender" as the secondary grouping, the report contents will appear as shown here. →

Record Count: 352											
COUNTRY ↓	US CITIZEN										
	-No Data-			no				yes			
	GENDER			GENDER		TOTAL		GENDER		TOTAL	
	-No Data-	Female	Male	TOTAL	Female	Male	TOTAL	-No Data-	Female	Male	TOTAL
-No Data-	6	14	14	34	0	0	0	0	0	0	0
Ecuador	0	0	0	0	0	1	1	0	0	0	0
Grenada	0	0	0	0	0	1	1	0	0	0	0
Guyana	0	0	0	0	0	1	1	0	0	0	0
Jamaica	0	0	0	0	1	0	1	0	0	0	0
Thailand	0	0	0	0	1	0	1	0	0	0	0
Trinidad and Tobago	0	0	0	0	1	1	2	0	0	0	0
USA	0	0	0	0	0	0	0	2	178	132	312

- If one or both "Grouped By" selections have been made, click the **Grouping Levels Display** drop-down arrow and select one of the available options to indicate how the summary table fields and grouped by selections should be positioned in the summary tables:

- Columns** – When this option is selected, the summary table fields are rows in the summary tables, while any grouped by selections are displayed as columns across the top of the tables.

- Rows** – When this option is selected, the summary table fields are displayed as columns in the summary tables, while any grouped by selections are displayed as rows in the tables. For example, if the sample report shown in step 5 is set to use "Rows" instead of "Columns," the report contents will appear as shown here. →

Record Count: 352										
US CITIZEN	GENDER	COUNTRY								
-No Data-	-No Data-	Ecuador	Grenada	Guyana	Jamaica	Thailand	Trinidad and Tobago	USA		
-No Data-	-No Data-	6	0	0	0	0	0	0	0	0
	Female	14	0	0	0	0	0	0	0	0
	Male	14	0	0	0	0	0	0	0	0
	TOTAL	34	0	0	0	0	0	0	0	0
no	Female	0	0	0	0	1	1	0	0	0
	Male	0	1	1	1	0	0	1	1	0
	TOTAL	0	1	1	1	1	1	1	1	0
yes	-No Data-	0	0	0	0	0	0	0	0	2
	Female	0	0	0	0	0	0	0	0	178
	Male	0	0	0	0	0	0	0	0	132
	TOTAL	0	0	0	0	0	0	0	0	312

The default value is "Columns."

This option is only applicable when one or more "Grouped By" selections have been made.

- To adjust the order in which the summary tables are displayed on the report, and/or to include graphs of the summary detail, click **Show Summary Tables Display Order** to make additional summary table-related options available on the page as shown here. →

This option is only applicable when more than one summary table is available for inclusion in the report.

- To adjust the order of the summary tables on the report page, click a characteristic in the "Summary Tables Display Order" portion of the page to highlight it. Drag and drop the highlighted characteristic into the desired list position, or use the up and down arrow icons to the right of the list to move the characteristic up or down.

The process of setting the summary table report options is now complete.

VIEWING OR UPDATING AN EXISTING REPORTBUILDER REPORT

To view or make changes to a ReportBuilder report for which there is a previously saved report format, complete the following steps:

- From the *AWARDS Opening Menu* page, click **Human Resources**. The *Human Resources Menu* page is displayed.
- Click **Employees ReportBuilder**. The *Report Settings* page is displayed. →

This page contains date range fields, as well as a list of any saved report formats to which you have access.

- By default the report looks for employees with active payroll records as of today's date. In the **Employee Date Range: From** and **To** fields, make changes to that default date range as necessary (using mm/dd/yyyy format). If a range of dates is specified the report will look for any employees with active payroll records at any point during that date range.

In this context payroll records are "Payroll Group Status History Records" as entered using the Human Resource module's Staff Information or Payroll Status features. An active payroll record means that the start or end date of the employee's payroll group status history overlaps with the report period at some point.

- Click the **Select a saved report format:** drop-down arrow and select the report format to be updated or to be used to view an employee report. The page is refreshed to include an option for modifying the settings of the selected format if desired.

To create a new report for which a format has not yet been saved, or to view a single-use ReportBuilder report, see "Generating a New ReportBuilder Report" on page 1.

5. To modify the settings of the selected format before viewing a report using that format, or to delete the report format entirely, click the **Provide option to modify settings of saved report format** check box and skip ahead to step 8.

Only the user who originally saved the report format and individuals who can save reports for all staff can modify or delete that format. Others can save modified report formats under a new name, but cannot apply changes to the original format.

To view a report using the selected report format *without* first modifying the settings of that format, leave the check box unchecked and continue with step 6.

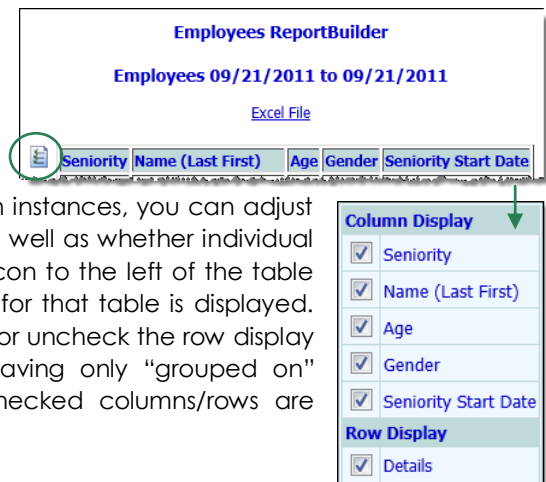
6. Click **CONTINUE**. The employees report is generated and displayed on the *Employees ReportBuilder* page.

When working with the report data, please keep in mind that:

- *The report shows the values for each characteristic as of the date on which the report is generated. For example, if an employee's marital status on his or her date of hire was "Married," but it has since changed to "Divorced," the report shows him or her as divorced, even when the report is run with the date range set to include the employee's hire date.*
- *When the report includes multiple value characteristics (those with an asterisk next to them on the initial Report Options page), the individual detail for each employee includes a list of the characteristic values separated by commas. Additionally, because each employee may have more than one value, the summary table totals information for any multiple value characteristic may not add up to the total number of employees.*
- *When a report is long enough to require you to scroll down the page to view all of its content, the header row of the data table (individual detail and/or summary) "freezes" at the top of the page, while the rest of the report detail is viewed. This enables you to view the column labels, even when scrolling down the page. Similarly, when printing a report that covers more than one page, the header row of any tables split between pages is shown at the top of each page.*

7. Once the report is displayed, complete any of the following tasks as needed:

- **Show/hide individual detail or summary table content** – In some cases you may have chosen to include an employee characteristic in the report for filtering or grouping purposes, but do not necessarily want to see the associated individual detail. Likewise, you may choose to include percentages or totals for summary tables but not want that information shown for all of those tables. In such instances, you can adjust which table columns are displayed on the report page, as well as whether individual detail is shown or hidden. To do so, click the show/hide icon to the left of the table you would like to alter. The *Column/Row Display* pop-up for that table is displayed. Check or uncheck columns for that table as needed, and/or uncheck the row display "Details" option to hide individual detail completely (leaving only "grouped on" data/cells and subtotal footer rows, if applicable). Checked columns/rows are displayed, unchecked are hidden.



The option to hide individual detail rows is only available when grouped on/footer options have been selected under "Individual Detail" on the Report Options – Continued page.

Showing/hiding columns and/or rows of individual detail or summary tables does not impact the contents of the Excel File version of the report data. Additionally, the show/hide icon is not included in print versions of the report.

- **Sort individual detail or summary table contents** – Click the heading of any table column to sort the table contents by that characteristic. Click that heading again to reverse the sort order. To sort by a secondary characteristic, press <SHIFT> and click on the second column heading.

When "Grouped On" has been selected as an individual detail option under report settings, sorting is NOT available.

When sorting is used, an ↑ or ↓ arrow next to a column heading indicates that the table data is being sorted using that column. The direction of the arrow indicates whether the sorting is in ascending (↓) or descending (↑) order. In this example, the table is being sorted alphabetically by employee name from A to Z.



Changing the sort order of an individual detail or summary table does not impact the contents of the Excel File version of the report data.

- **Print the report** – To do so, click **File** on the Internet browser's menu bar and select **Print**. Adjust the printer settings as necessary, and then click **Print** to complete the printing process.
- **Export the contents to Microsoft Excel** – To do so, click the **Excel File** link at the top of the page.

The process of viewing an existing ReportBuilder report is now complete.

8. Click **CONTINUE**. The *Report Options* page is displayed.
9. Make changes to the settings on this page if needed.
10. Click **CONTINUE**. The *Report Options – Continued* page is displayed.
11. Make adjustments to the settings on this page if needed.

Individual detail report options and/or summary table selections must be set before the report can be generated. For more information on using the various report options see "Understanding Employees ReportBuilder Options" on page 5.

12. To save any changes made to the report format in steps 9 and/or 11, click **SAVE REPORT FORMAT**. The *Save Report Format* dialog box is displayed.

To view the modified report without saving the settings changes, skip ahead to step 16.

*If the selected report format is one you originally created, or if you have the ability to save report formats for all users, you also have the option to delete the format entirely at this time. To do so, click **DELETE REPORT FORMAT** instead of **SAVE**, and then complete the process by clicking **OK** on the confirmation dialog box that is subsequently displayed.*

13. The **Report Format Title** defaults to the name of the selected report format. To save the modified report format as a new format and to leave the original format unchanged, enter a new title in this field. If the default title is not changed, the modifications being saved will be applied to the original format.

Only the user who originally saved a report format and individuals who can save formats for all users can modify that format. Others can save modified report formats under a new name, but cannot apply the modifications to the original format.

14. Make changes to the **Save Report Format for** option as necessary.

15. Click **Save Report Format**. If the "Report Format Title" field contained the title of the original report format, the modifications are applied to that format. If the field contained a new title, the original format is left as is, and a new format is saved with the selected settings.

If you do not have the authority to modify the report format and you did not change the report format title before clicking save, you will be prompted to do so now.

The Report Options – Continued page is re-displayed.

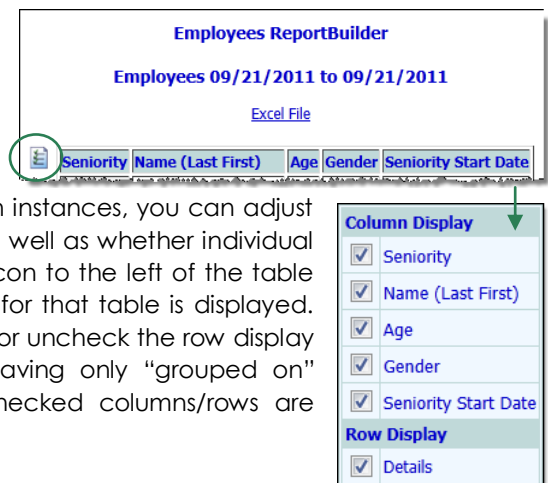
16. Click **DISPLAY REPORT**. The report is generated and displayed on the Employees ReportBuilder page.

When working with the report data, please keep in mind that:

- *The report shows the values for each characteristic as of the date on which the report is generated. For example, if an employee's marital status on his or her date of hire was "Married," but it has since changed to "Divorced," the report shows him or her as divorced, even when the report is run with the date range set to include the employee's hire date.*
- *When the report includes multiple value characteristics (those with an asterisk next to them on the initial Report Options page), the individual detail for each employee includes a list of the characteristic values separated by commas. Additionally, because each employee may have more than one value, the summary table totals information for any multiple value characteristic may not add up to the total number of employees.*
- *When a report is long enough to require you to scroll down the page to view all of its content, the header row of the data table (individual detail and/or summary) "freezes" at the top of the page, while the rest of the report detail is viewed. This enables you to view the column labels, even when scrolling down the page. Similarly, when printing a report that covers more than one page, the header row of any tables split between pages is shown at the top of each page.*

17. Once the report is displayed, complete any of the following tasks as needed:

- **Show/hide individual detail or summary table content** – In some cases you may have chosen to include an employee characteristic in the report for filtering or grouping purposes, but do not necessarily want to see the associated individual detail. Likewise, you may choose to include percentages or totals for summary tables but not want that information shown for all of those tables. In such instances, you can adjust which table columns are displayed on the report page, as well as whether individual detail is shown or hidden. To do so, click the show/hide icon to the left of the table you would like to alter. The Column/Row Display pop-up for that table is displayed. Check or uncheck columns for that table as needed, and/or uncheck the row display "Details" option to hide individual detail completely (leaving only "grouped on" data/cells and subtotal footer rows, if applicable). Checked columns/rows are displayed, unchecked are hidden.



The option to hide individual detail rows is only available when grouped on/footer options have been selected under "Individual Detail" on the Report Options – Continued page.

Showing/hiding columns and/or rows of individual detail or summary tables does not impact the contents of the Excel File version of the report data. Additionally, the show/hide icon is not included in print versions of the report.

- **Sort individual detail or summary table contents** – Click the heading of any table column to sort the table contents by that characteristic. Click that heading again to reverse the sort order. To sort by a secondary characteristic, press <SHIFT> and click on the second column heading.

When “Grouped On” has been selected as an individual detail option under report settings, sorting is NOT available.

When sorting is used, an ↑ or ↓ arrow next to a column heading indicates that the table data is being sorted using that column. The direction of the arrow indicates whether the sorting is in ascending (↓) or descending (↑) order. In this example, the table is being sorted alphabetically by employee name from A to Z.



Changing the sort order of an individual detail or summary table does not impact the contents of the Excel File version of the report data.

- **Print the report** – To do so, click **File** on the Internet browser's menu bar and select **Print**. Adjust the printer settings as necessary, and then click **Print** to complete the printing process.
- **Export the contents to Microsoft Excel** – To do so, click the **Excel File** link at the top of the page.
- **Save the format of the report for future use if you have not already done so** – To do so, click the Internet browser's **Back** button to return to the *Report Options – Continued* page, and then complete steps 12 through 15 above.

The process of viewing or updating an existing ReportBuilder report is now complete.

FREQUENTLY ASKED QUESTIONS

The following frequently asked questions regarding the Human Resources module ReportBuilder feature can be a useful reference when you have your own questions about the functionality.

ARE THE EMPLOYEES REPORTBUILDER REPORT CONTENTS LIMITED TO INFORMATION FOR ACTIVE EMPLOYEES?

No, inactive employees may also be included in the report based on the report date range and payroll record start and end dates. Specifically, the report looks at any employees with payroll records where the start or end date of the employee's payroll group status history overlaps with the report period at some point. As a result, the employee could have been active for only part of the report period but still be included in the report contents.

HOW ARE “JOB TITLE START DATE” AND “JOB TITLE END DATE” DETERMINED?

Job title start and end dates are determined using the following rules:

- **Job Title Start Date** – This is the start date that corresponds to the job title being displayed for an employee, as entered in the “Job Title Start” field on the staff information record.
- **Job Title End Date** – This is the end date that corresponds to the job title being displayed for an employee, as entered in the “Job Title End” field on the staff information record.

Please keep in mind that these report variables are only available for agencies that have opted to display the "Job Title History" portion of staff information records, as opposed to just one current Job Title. Please contact the Help Desk if you are interested in turning on the history aspect of this functionality at your agency.

HOW ARE "SENIORITY" AND "SENIORITY START DATE" CALCULATED?

Seniority and seniority start date are calculated using the following rules:

- **Seniority Start Date** – This is the payroll group start date on the first of a group of previous consecutive and continuous payroll records for which the payroll type is "Full Time," "Part Time," or "On Leave."
- **Seniority** – This is the number of years between the seniority start date and the end date of the report being run, or between the seniority start date and termination date if applicable. Seniority is only accrued by staff who have been specified as "Full Time," "Part Time," or "On Leave."

HOW IS AN EMPLOYEE'S "SALARY - ANNUAL" OR "SALARY - HOURLY" DETERMINED?

Salary amounts are determined using the following rules:

- **Salary - Annual** – This is the annual salary of an employee as entered in his or her staff information record in the "Annual Basis" field; otherwise, the annual salary is determined using the "Hourly" rate entered under staff information.
- **Salary - Hourly** – This is the hourly salary of an employee as entered in his or her staff information record in the "Hourly" field; otherwise, the hourly salary is determined using the "Annual Basis" amount entered under staff information.

Keep in mind that if an employee has multiple payroll group records during the report's date range, the report displays information for each of the payroll group records in a separate row of the report. Each row reports on the most recent salary on record that corresponds to the dates of the payroll group.

The hours/week displayed on a salary record is the number of hours/week entered in the payroll group record that applies to the salary effective date. Salary records can span payroll group records. If the annual salary is calculated off the hourly salary for non-OT exempt employees, it is calculated using that number of hours/week. In the Employees ReportBuilder, hours/week are taken from the payroll group record in the report so the calculation will be correctly done with the more up to date information. If the payroll group is set with a type of "On Leave," the salary shown will be that of the previous payroll group. (The annual salary will not be calculated using zero hours/week.)

Also note that only users with the "Human Resources Data Full Access" permission or the "Human Resources Data Read Only" permission will have these report variables available to them. Users with the "Human Resources Data Work Supervisees" permission do not have access to salary information.

HOW IS AN EMPLOYEE'S "TERMINATION DATE" DETERMINED?

If the employee is not active, his or her termination date is the payroll group end date entered for him/her on the most recent payroll record. Payroll records are updated using the Staff Information or Payroll Status features in the Human Resources module.

In order to be included in the report contents, a termination date need not be within the report date range. Terminated employees will be included even if their termination dates are past the report end date as long as they had an active payroll record at some point during the report date range.

WHERE DOES THE "CURRENT WEEKLY HOURS" DATA COME FROM?

Current weekly hours are calculated using any work schedule data entered for the employees in the Human Resources or Organizer modules. In addition to being available as a variable in the ReportBuilder, they also display at the top of individual employee work schedules.

WHO CAN SAVE REPORT FORMATS FOR OTHER USERS?

In a single-agency AWARDS database, members of the "System Administrator" and "Executive Officer" user groups have the ability to save report formats to be used by other agency users. In a multi-agency/HMIS AWARDS database, the option to save reports for other users is available to the "System Administrator," "CoC Executive Officer," "CoC Executive Support Staff," and "Agency Executive Officer" user groups. People who are not members of the specified user groups can only save report formats for themselves.

WHY AREN'T ALL SELECTED CHARACTERISTICS AVAILABLE FOR SUMMARY TABLES?

Several characteristic data fields are not available for selection as part of a summary table, regardless of whether they were selected on the report settings page where employee characteristics are specified. For example, name, date of birth, social security number, client ID, street address, phone number, and so on. These characteristics are excluded because they have values that are unique to each employee, and as such are unlikely to generate any meaningful summary data.

WHY DO FUNCTIONS SUCH AS "COUNT" NOT WORK WHEN VIEWING SUMMARY TABLE INFORMATION IN EXCEL?

Those cells in the Excel version of the report for which functions will not work are noted as such with a green triangle in the top right corner. If you click on a cell that has one of these green triangles in it, an exclamation point is displayed. Click the exclamation point for an explanation of why the function is not available. In the case of the summary portion of the report the functions such as "count" do not work in many cases because the number values are stored as text rather than numbers.

The summary information included in the report is provided so that the types of manual calculations that can be completed using Excel functions are unnecessary. In the event that a manual calculation is still required, you will need to convert the text values to numbers. To do so, click the exclamation point mentioned above and select the corresponding option.

WHY DOESN'T MY REPORT YIELD ANY RESULTS WHEN I APPLY A DATE FILTER?

When filtering on a date be sure that the date is entered using mm/dd/yyyy format. If a different format is used the report filter will not work properly.

WHY DON'T I SEE THE "ADD ADDITIONAL FILTERS" LINK?

If the add additional filters link is not displayed, it is an indication that you have reached the maximum number of filters for a given report – eight. No additional filters can be added in such cases, and so the link is hidden.

WHY IS A CHANGE I MADE TO AN EMPLOYEE'S RECORDS NOT IMMEDIATELY REFLECTED IN THE REPORT?

When reports in AWARDS are not immediately displaying information updated in the same database login session, it can be indicative of a memory cache issue. To get around this, press **<CTRL+R>** while viewing the report page, or click your browser's refresh icon.

WHY ISN'T INDIVIDUAL DETAIL OR SUMMARY TABLE SORTING I DO ON THE REPORT PAGE REFLECTED IN THE EXCEL VERSION OF THE REPORT?

Changing the sort order of an individual detail or summary table on the report page overrides any sorting for those tables specified in the report settings or in a saved report format. However, the functionality is designed so that such changes do not impact the contents of the Excel file version of report data, nor are they saved when a report format is saved. If it is necessary to sort the data in the Excel file, Excel has extensive sorting functionality for that purpose.