Report Center Next Gen User Guide

Viewer

Copyright notice

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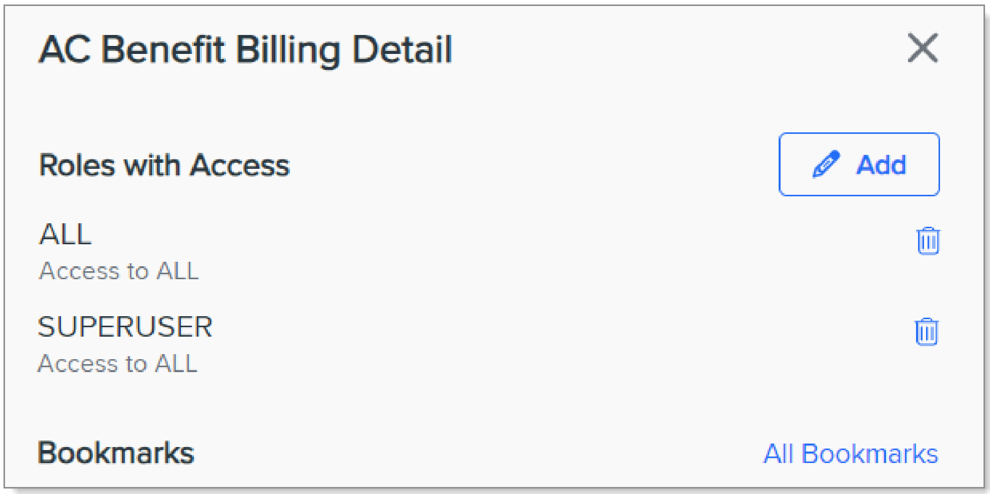
Chapter 1

Introduction

Report Center is a centralized and consolidated reporting tool. It comes with many predefined reports that you can use as is or that you can quickly customize to meet the specific requirements of your organization. You can also easily define the presentation of the output and change it at any time as your requirements change.

Report Access

Report access is role-based. Only the reports for which your role has access privileges are available in Report Center. Before you can begin using Report Center, an administrator must grant you access to Report Center and to any report to which members of your role require access. Report Center applies PrismHR user role security. See your administrator if you need to change your access privileges.



Accessing Report Center

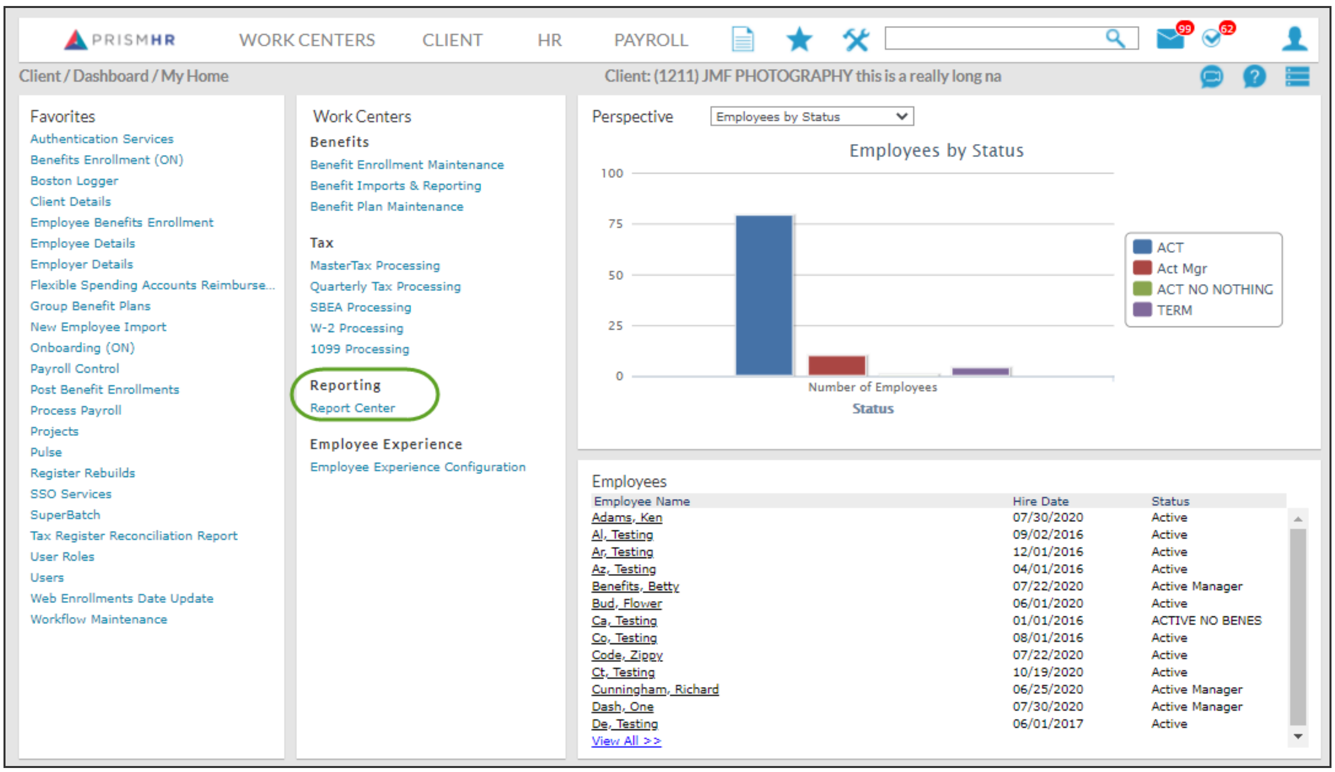
Service Providers and Worksite Managers can access Report Center from the PrismHR Dashboard or from Employee Portal. See your administrator if you do not have the access you require.

Accessing from the PrismHR Dashboard

A service provider or worksite manager can access Report Center from the PrismHR Dashboard.

To access Report Center from the Work Centers panel:

1. Open the PrismHR Dashboard.
2. On the Work Centers panel, click Report Center in the Reporting section.



To access Report Center by searching:

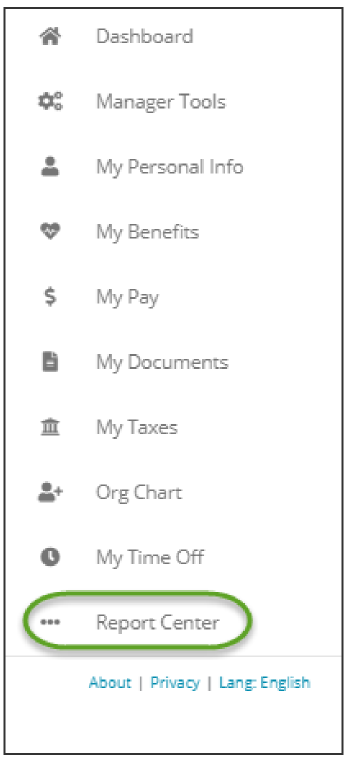
1. Open the PrismHR Dashboard.
2. In the Search box, type Interactive Reports.
3. Click Report Center in the list of results.

Accessing Report Center Using Employee Portal

A manager can access Report Center using Employee Portal.

To access Report Center:

1. Open Employee Portal.
2. In the menu list, select Report Center.



Workbooks

In Report Center, reports are defined with three key terms: workbooks, pages, and datasets. A workbook refers to the entire report, such as the ACH History report or the Employee General Info report. A page on a report refers to a specific view for the report, including the columns that will display and any additional visualizations. A dataset refers to the category of information collected in the system. Each report pulls information from one or more data sets and displays them as pages based on selected settings.

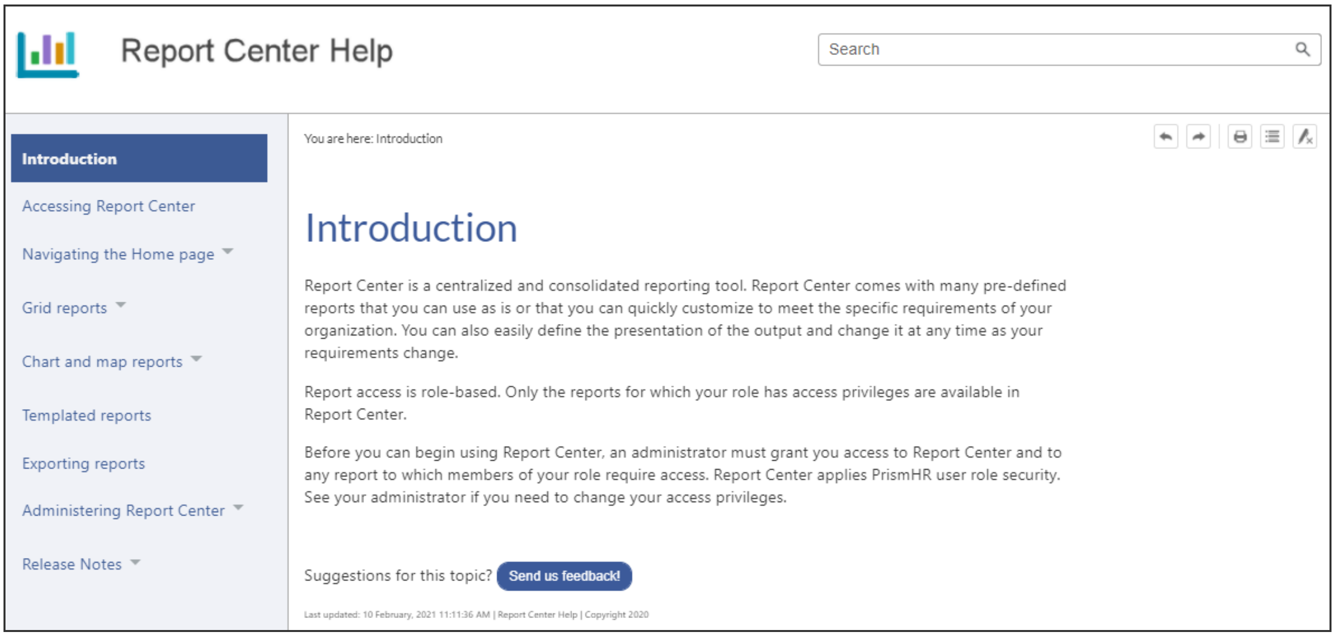
These terms are analogous to a spreadsheet program, with the workbook referring to the spreadsheet file, the page being a tab in that file, and the dataset as hidden information that was used to generate that spreadsheet.

These terms are important when viewing Sigma help documentation and guides, but are not used extensively throughout this documentation.

Getting Help

Report Center provides online help for both users and administrators. Your role determines which topics you can access.

Click (Help) next to the Global Client Selector to open the help system.



Using the toolbar

Use the toolbar to perform these actions. A tooltip is available for each icon.

- Browse to the previous or next topic.
- Print the current topic.
- Expand or collapse the TOC.
- Remove highlighting from topics that you opened from search results.

Searching for topics

To find specific topics, type text in the Search box and click .

The list of results contains all topics that include the text in their titles or content. For example, if you type Summary, the results list includes a link to each topic whose title or content contains the word Summary. It shows the total number of matches and displays the text in bold if it is in the topic title.

You can also find topics by navigating through the Table of Contents (TOC). Just expand and collapse sections until you find what you are looking for.

Submitting documentation feedback

Each topic in the help system provides an option for you to send feedback about that topic. Your input goes directly to the PrismHR documentation team and will be promptly answered.

Note: The **Send us feedback** option is intended for comments about the documentation.

- To send product/release feature requests, submit a PrismHR Idea. Alternately, you can click the following icon at the lower right hand corner of the Report Center home page and use the Feedback option to send feedback directly to our product team.

Chapter 2

Navigating the Reports page

On the Reports page, the list of reports shows only the reports to which your administrator has given you access. There are two basic types of reports.

- System reports come with Report Center and are predefined. You can temporarily configure a system report based on your requirements.
- An administrator can modify a copy of a system report and save it as a new custom report. An administrator can also modify a custom report and save it as a new report. If the administrator shares a custom report with your role, that report is shown in your list of reports.

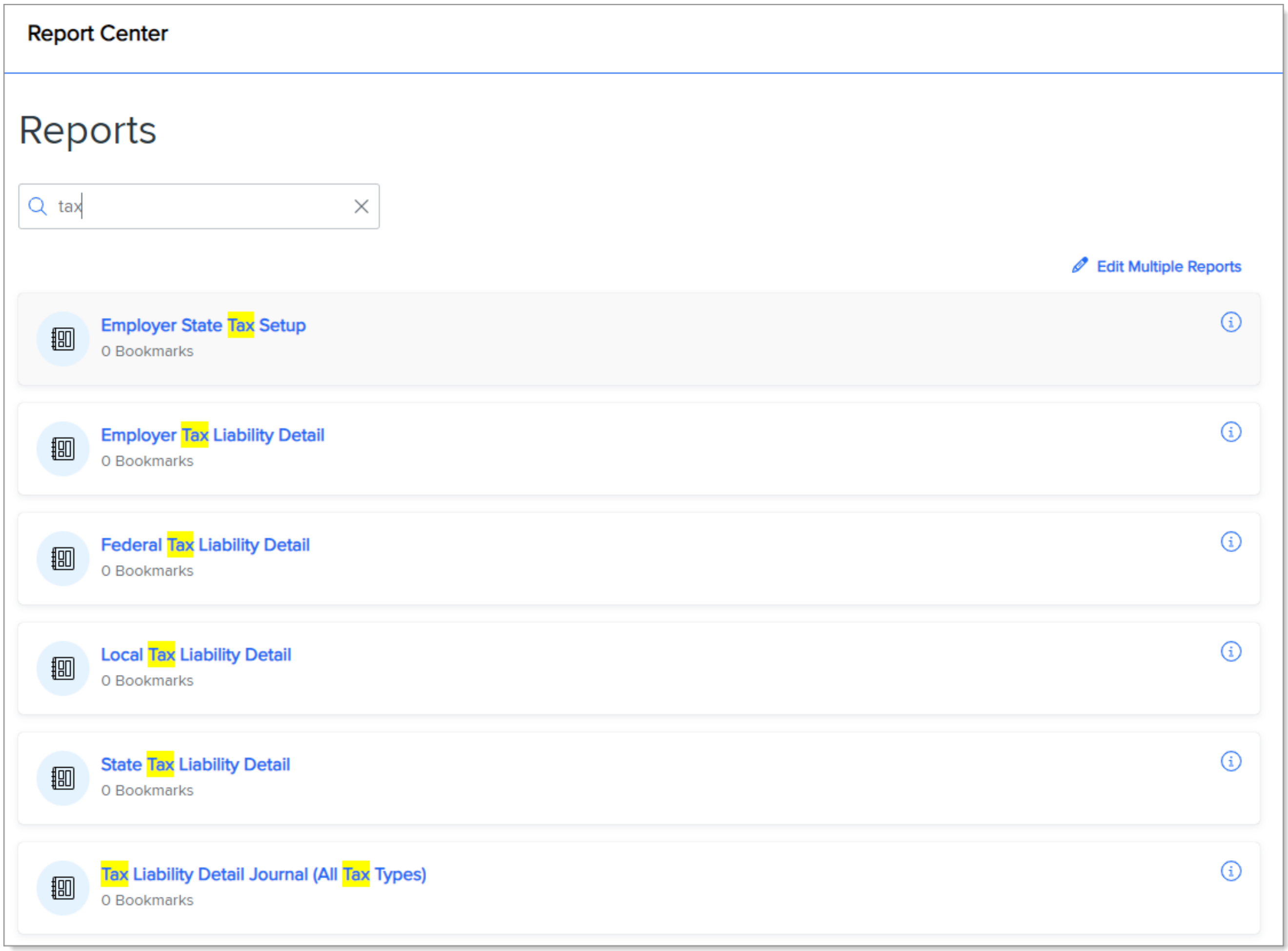
The list of reports on your Reports page depend on your security settings.

You can use the breadcrumb bar to show where the current page fits into the site hierarchy and navigate between levels. For instance, if you start on Benefits Adjustment Report and jump directly to Worksite Locations, the breadcrumb shows **Report Center**> **Worksite Locations**.

Searching for reports

You can search for reports by entering text in the Search box on the home page. Searches are case insensitive for partial or full matches in the report name or description. For example, searching for tax presents a list of reports where the word tax appears anywhere in the report name or description.

In the following example, the search results contain reports whose names or descriptions include the word "tax."



Viewing bookmarks

On the Reports page, you can view a list of bookmarks available for a report. The bookmarks that are available on a report depend upon your security settings.

To view the bookmarks for a report from the Home page:

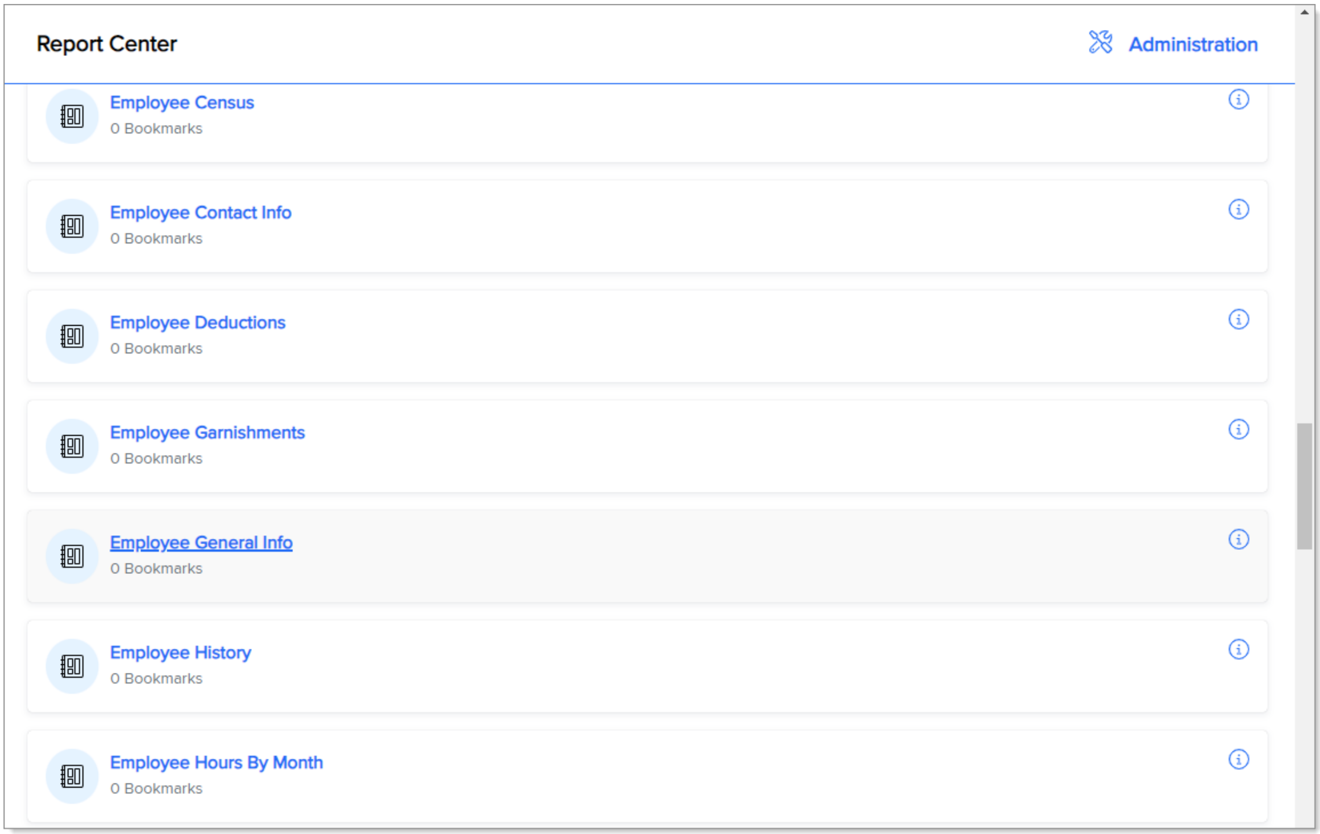
1. Launch Report Center.
2. Scroll through the list (or search) and click the report icon or the information icon.

   The Report Details panel displays.

Select a bookmark to open the report to that bookmarked Page.

Opening a report

The list of reports shows only the reports to which you have been given access. See your system administrator if you have questions or need access to additional reports. You can open a report from the Report Center Home page or from within another report that you have open.



To open a report from the Home page:

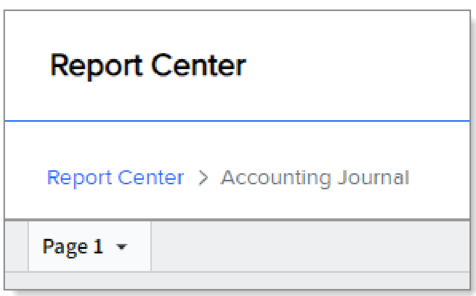
1. Launch Report Center.
2. Scroll through the list (or search) and click the report name.

Chapter 3
Viewing Reports

Reports are displayed in tables which are similar to spreadsheets, with individual pages that display data and visualizations.

Selecting Pages on the Report

Each report contains one or more pages. The page properties determine which columns and visualizations display to the viewer. Pages are displayed near the top of the screen. Select a page to view the report using that page's specific configuration. The pages you can access for each report depend on your security settings.

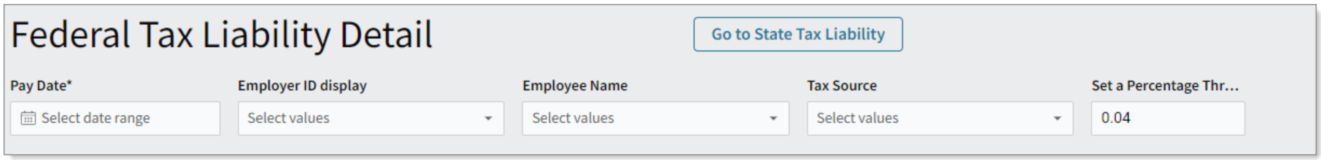


Resetting a Report

As you specify parameters, sort columns, or adjust visualizations, you may want to restore the report to its default state. After making any changes to your current view on a report, you can select **Reset** in the upper-right corner to restore the report to the default view.

Controlling Parameters on a Report

Parameters can be used to control what data displays on the report. The available parameters display near the top of the page, underneath the Page selection. When you select parameters to include on the report, the report results are immediately filtered according to your selection.

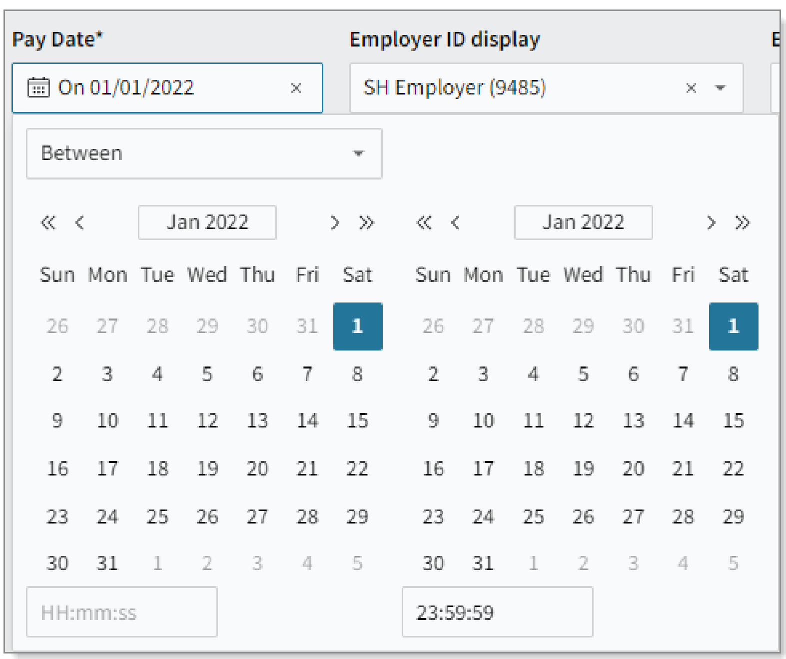


Using parameters, you can quickly filter results, clear selections, or search for specific values to instantly update the displayed report data.

To filter results by a parameter:

1. Select an available parameter from the available fields.
2. Select the check mark to include one or more individual parameters. When you select one or more options, only records with those options display on the report.

   If the parameter is a date field, you can select specific dates to include on the report, select a range of dates, or select time frames. For example, you could include the 2nd and 9th of January, all dates from the 1st of May to the 1st of June, or the last ninety days.

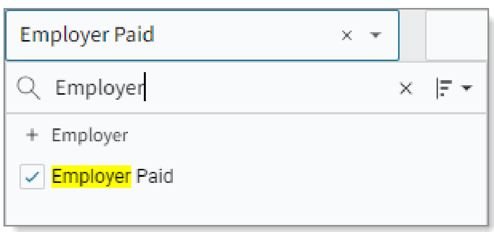
To clear selections from a parameter:

1. Select the x icon to clear the parameter selection. Once cleared, the parameter is set to include all results.

To search for values in a parameter:

1. Select an available parameter from the available fields.
2. Enter search criteria in the search bar that displays at the top of the selection menu. The selection menu is immediately updated with search results, which can be selected to filter the report data.

   In addition, you can sort the values for the parameter to expedite your search. Select the Sort icon to sort by ascending or descending order.



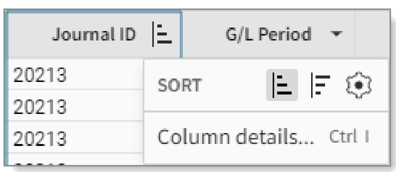
Controlling Columns on the Report

Each report page comes with a set of columns that display data. Much like a spreadsheet, columns display individual entries as cells. Each column represents either a set of data or a calculation performed on data sets. These columns can be organized by sorting the report based on an individual column's data.

To sort the data in a column:

1. Select the Dropdown icon on a column.
2. Select the Ascending icon to sort the data in ascending order, or select the Descending icon to sort the data in descending order.

The report can also be sorted according to multiple columns in sequence by defining a custom sort. For example, a report could be sorted by Column A in descending order, followed by Column C in ascending order.

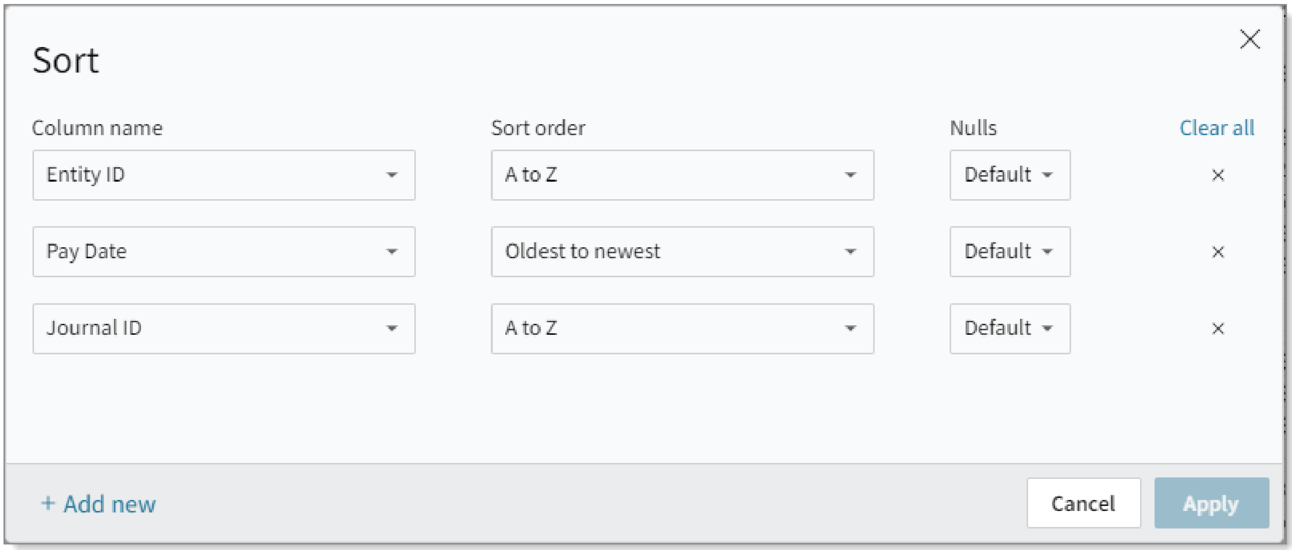


To create a custom sort:

1. Select the Dropdown icon on a column.
2. Select the Custom Sort icon. The Sort form displays.

   On the Sort form, you can define sort orders for multiple columns. The Sort form is applied in descending order.
3. In the first row, select the **Column name** to pick a column to sort.
4. Select an ascending or descending order in the **Sort order** field.
5. In the Nulls field, select whether null values should be considered first or last in a list, or leave the field on default settings. The default selection places null values last.
6. To add an additional row to the Sort form, click **+ Add new**.
7. Repeat the selection process for each row you add.
8. Once all options are selected, click **Apply**.

   The Custom Sort will sort the report according to all rows included on the Sort form in sequential order. For example, you could create three rows and select Entity ID, Pay Date, and Journal ID. The entire report would be sorted by Entity ID, then data for each entity ID would be sorted by Pay Date, and the rows for each pay date would be arranged by Journal ID.



Some columns can be expanded to display additional rows of data for individual items contained within the column. For instance, the year column in a summary report could be expanded to show a row for each month.

To expand a column:

1. Select the Plus icon next to the column name. Additional data displays.
2. Select the Minus icon to minimize the column.

Columns can be summarized to display an overview of the data for that specific column. This overview includes statistics such as the most frequently occurring values, the row count, the average, the median, and the variance.

To display a summary of a column:

1. Click the Dropdown icon on a column.
2. Select **Column details**.

   The Column Details form displays. The name and equation for the column appear in the About section. The Top Values section displays the most frequently-occurring values in that column. The Summary section shows the number of rows, number of null items, and number of distinct values. The Statistics section shows the average, median, maximum, minimum, and other statistics.

Note: The Column Details section also displays the Unidata attributes for the report, which allows users to learn exactly which Prism fields correspond to the data.

3. When you are finished reviewing the details, click the X icon to close the Column Details form.

Controlling Visualizations

Visualizations are graphical representations of data, such as charts and graphs. Visualizations can be used to see patterns, trends, correlations, and outliers for data sets in a focused and easily understandable format. In addition, visualizations can be examined for further information on a report to see the underlying data.

To view a visualization's data:

1. Right click on the visualization.
2. Select **Show underlying data**.

   A table of data displays, which includes all the data for the selected visualization.

To drill down to a visualization's data:

1. Double click on a visualization to drill down to its data.

To expand a visualization:

1. Hover the cursor over a visualization. A small menu displays in the upper-right corner.
2. Click the Expand icon to expand the visualization.

   The visualization is maximized to encompass the entire page.

To minimize an expanded visualization:

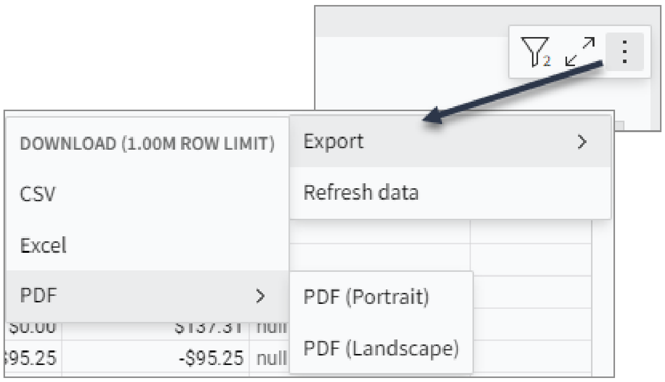
1. Hover the cursor over a visualization. A small menu displays in the upper-right corner.
2. Click the Minimize icon to minimize the visualization.

   The visualization is reverted to its default size.

Exporting Reports

Reports can be exported for presentations, further calculations, or archiving. Reports can be exported into several formats, including CSV, XLS, and PDF.



To export the current page of a report:

1. Select the ⋮ (Additional Options) icon on a column.
2. Select **Export**.
3. Select a file format. Selecting **PDF** provides the option for Portrait layout or Landscape layout.

   Once a format is selected, the report will be downloaded as the selected file type.

