



# New UI Before and After Reporting Quick Guide

# New UI Reporting Highlights

- Same general reporting options are available.
- With just a few clicks, add a visual element to your data using charts and graphs.
- All saved reports from classic carry over into the new experience

# Classic Report

COMPANY logo - Demo - 3:10 PM (Pacific) Feedback Katie Prosper 35 7 ? TRY OUR NEW LOOK!

START My Account **My Employees** Scheduler Recruitment Manage Time Manage Payroll My Reports Our Company Company Settings

BACK Home > My Employees > **Employee Information** VIEW SELECTED EMPLOYEES HIRE EMPLOYEE UTILITIES SPLIT VIEW

Rows On Page 200 37 Rows Refresh Data Full Screen Admin Employees Settings Filter Select Columns Export

Employee Filter: All Employees Custom Filter: ADD NEW

	DEPARTMENT(1)	EMPLOYEE ID	FIRST NAME	LAST NAME	EMPLOYEE STATUS	UNEMPLOYMENT STATE	DATE HIRED
<input type="checkbox"/>	=	starts with	starts with	starts with	!= Terminated	=	=
<input type="checkbox"/>	Admin	0026	Allison	Booton	Active	WA	03/04/2002
<input type="checkbox"/>	Customer Service	0010	Andrew	Fizer	Active	WA	02/12/2003
<input type="checkbox"/>	Call Center	555	Anna	Bell	Active	WA	11/13/2018
<input type="checkbox"/>	Call Center	0018	Ashley	Adams	Active	OR	07/17/2018
<input type="checkbox"/>	Customer Service	0029	Bill	Loss	Active	WA	03/10/2005
<input type="checkbox"/>	Call Center	38	Caitlin	Sullivan	Active	WA	01/01/2017
<input type="checkbox"/>	Customer Service	39	Caitlin	Sullivan2	Active	WA	01/01/2018
<input type="checkbox"/>	Customer Service	40	Caitlin	Sullivan3	Active	WA	01/01/2019
<input type="checkbox"/>	Admin	0001	Cathy	Watts	Active	WA	03/01/2005
<input type="checkbox"/>	Call Center	0013	Cherly	Lee	Active	WA	11/03/2003
<input type="checkbox"/>	Admin	41	Dana	Tenorio	Active	WA	04/03/2012
<input type="checkbox"/>	Call Center	0011	Dave	Geiger	Active	WA	08/16/2004
<input type="checkbox"/>	Admin	0015	Debra	Neilson	Active	WA	01/05/2004
<input type="checkbox"/>	Call Center	0025	Eva	Amontis	Active	WA	01/05/2004

# New UI Report: Clean and Consolidated

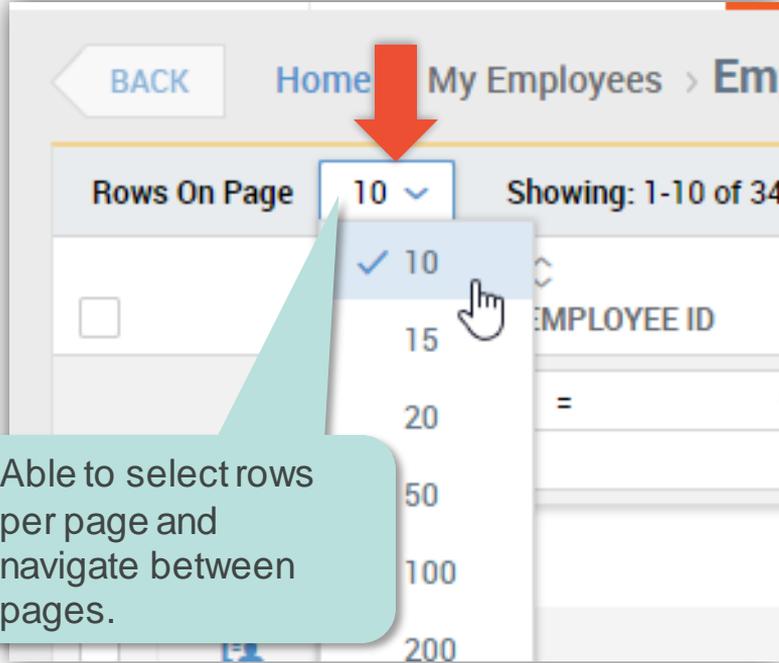
COMPANY logo MY TEAM Feedback 36 7 ? BACK TO CLASSIC

← Employee Information HIRE TERMINATE REHIRE VIEW ...

Page 1 of 1 1 - 37 of 37 Rows Saved: Report Name Columns (1) (1)

	Department(1)	Employee Id	↑ First Name	Last Name	↓ Employee Status	Unemployment State	Date Hired
	=	starts with	starts with	starts with	!=	=	=
					Terminated		
<input type="checkbox"/>	Admin	0026	Allison	Booton	Active	WA	03/04/2002
<input type="checkbox"/>	Customer Service	0010	Andrew	Fizer	Active	WA	02/12/2003
<input type="checkbox"/>	Call Center	555	Anna	Bell	Active	WA	11/13/2018
<input type="checkbox"/>	Call Center	0018	Ashley	Adams	Active	OR	07/17/2018
<input type="checkbox"/>	Customer Service	0029	Bill	Loss	Active	WA	03/10/2005
<input type="checkbox"/>	Call Center	38	Caitlin	Sullivan	Active	WA	01/01/2017
<input type="checkbox"/>	Customer Service	39	Caitlin	Sullivan2	Active	WA	01/01/2018
<input type="checkbox"/>	Customer Service	40	Caitlin	Sullivan3	Active	WA	01/01/2019
<input type="checkbox"/>	Admin	0001	Cathy	Watts	Active	WA	03/01/2005
<input type="checkbox"/>	Call Center	0013	Cherly	Lee	Active	WA	11/03/2003
<input type="checkbox"/>	Admin	41	Dana	Tenorio	Active	WA	04/03/2012
<input type="checkbox"/>	Call Center	0011	Dave	Geiger	Active	WA	08/16/2004
<input type="checkbox"/>	Admin	0015	Debra	Neilson	Active	WA	01/05/2004
<input type="checkbox"/>	Call Center	0025	Eva	Amontis	Active	WA	01/05/2004
<input type="checkbox"/>	Customer Service	0003	George	Allerton	Active	WA	03/06/2001
<input type="checkbox"/>	Call Center	24	Herbert	Raif	Active	WA	07/05/2017

# Pages and Rows



Rows On Page 10 ▾ Showing: 1-10 of 34

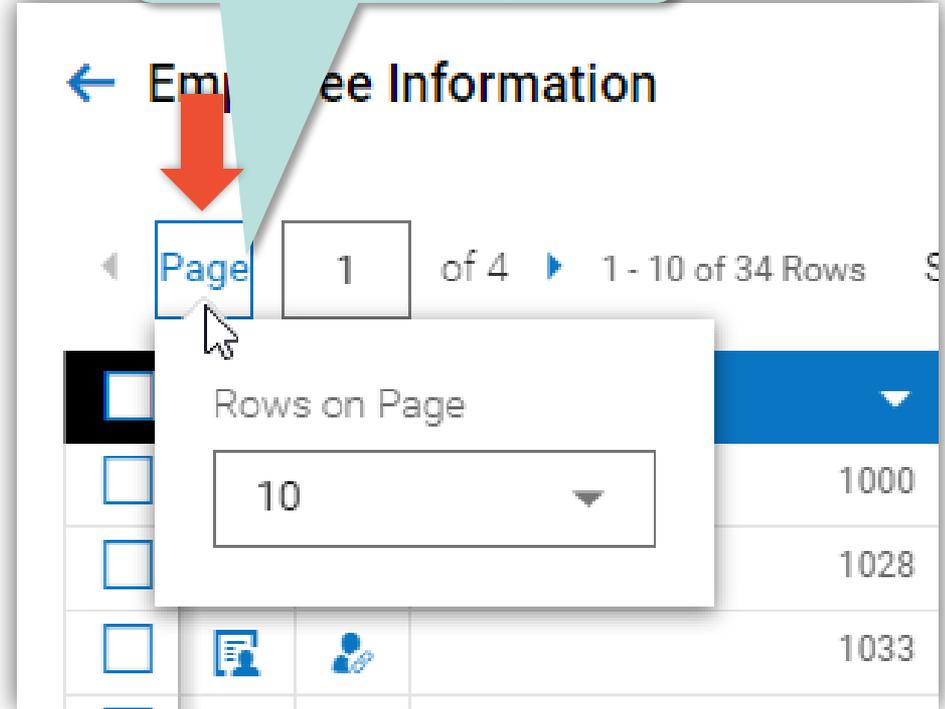
- ✓ 10
- 15
- 20
- 50
- 100
- 200

EMPLOYEE ID

=

Able to select rows per page and navigate between pages.

Same location, but rows per page option shown upon clicking the word **Page**.



← Employee Information

Page 1 of 4 ▶ 1 - 10 of 34 Rows

Rows on Page

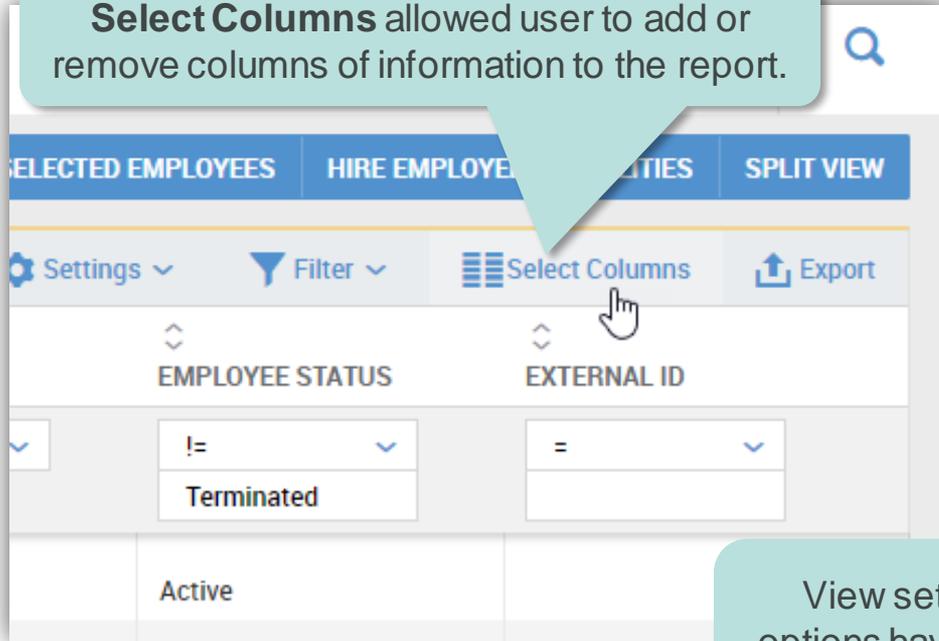
10 ▾

<input type="checkbox"/>	1000
<input type="checkbox"/>	1028
<input type="checkbox"/>	1033

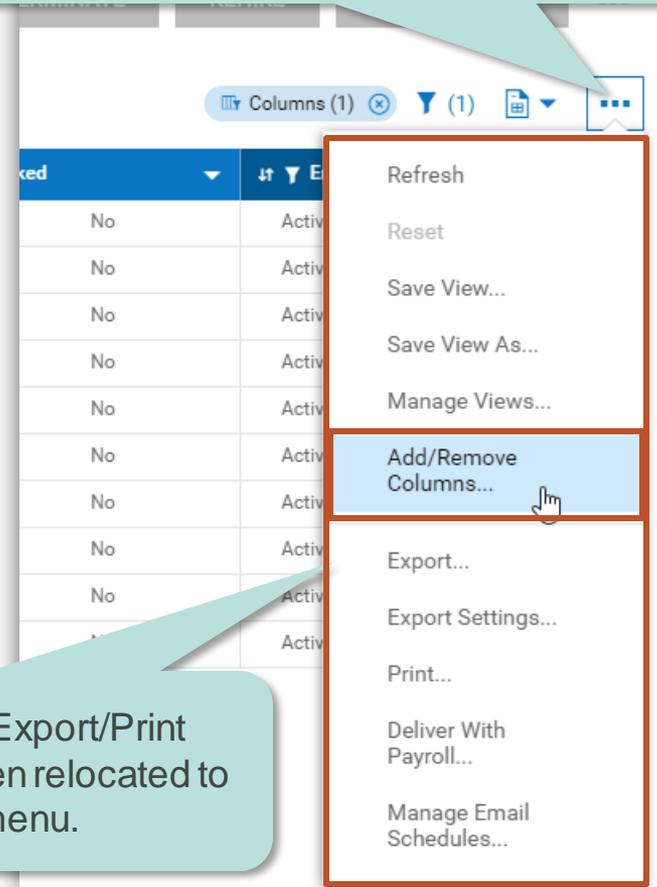


# Select Columns & Ellipsis

**Select Columns** allowed user to add or remove columns of information to the report.



**Add/Remove columns** offers same features, but is accessed via the ellipsis.



View settings and Export/Print options have also been relocated to the ellipsis menu.

# Column Filters

Column filters are all visible at the top of the column regardless of use.

LAST NAME	COST CENTERS(1)	TYPE
Edwards	St. Louis	Hourly
Wilcox	Indianapolis	Hourly
Harrell	St. Louis	Hourly
Decker	Chicago	Hourly
Edwards	St. Louis	Hourly
Giles	Indianapolis	Hourly
Small	Indianapolis	Hourly
Tillman	Chicago	Hourly
Gross	St. Louis	Hourly

Page 1 of 1 | 1 - 37 of 37 Rows

Cost Center(1)
=
Admin
Customer Service
Call Center
Call Center

This has not changed, but there are more options to access filters

# Column Filters: Expanded options

Quickly set or clear value filters on multiple columns by clicking the pill icon.

The screenshot shows a 'Filters' dialog box with two tabs: 'Global' and 'Column'. The 'Column' tab is selected. The dialog contains several filter rows, each with a dropdown menu and an input field. A hand cursor is pointing to the pill icon on the 'Cost Centers(1)' filter. The background shows a data table with columns 'Cost Centers(1)' and 'Pay Type'. The table contains 10 rows of data. The 'Filters' dialog also has 'CANCEL' and 'APPLY' buttons at the bottom.

Cost Centers(1)	Pay Type
St. Louis	Hourly
Indianapolis	Hourly
St. Louis	Hourly
Chicago	Hourly
St. Louis	Hourly
Indianapolis	Hourly
Indianapolis	Hourly
Chicago	Hourly
St. Louis	Hourly
Chicago	Hourly

Employee Id	Username	First Name	Last Name	Cost Centers(1)	Pay Type	In Payroll	Locked	Employee Status
=	=	starts with	starts with	=	=	All	All	

# Sorting

Sort ascending/descending

LAST NAME	COST CENTERS(1)	PAY TYPE
Edwards		
Wilcox	Indianapolis	Hourly
Harrell	St. Louis	Hourly
Decker	Chicago	Hourly
Edwards	St. Louis	Hourly
Giles	Indianapolis	Hourly
Small	Indianapolis	Hourly
Tillman	Chicago	Hourly
Gross	St. Louis	Hourly

Sort ascending/descending

Last Name	Cost Centers(1)	Pay Type	In
Edwards	St. Louis		
Wilcox	Indianapolis		
Harrell	St. Louis		
Decker	Chicago		
Edwards	St. Louis		
Giles	Indianapolis		
Small	Indianapolis		
Tillman	Chicago		

Column Filter: =

Sort Ascending ↑

Sort Descending ↓

CANCEL APPLY

# Grouping

Group results by this column

LAST NAME	COST CENTERS(1)	PAY TYPE
Edwards	St. Louis	Hourly
Wilcox	Indianapolis	Hourly
Harrell	St. Louis	Hourly
Decker	Chicago	Hourly
Edwards	St. Louis	Hourly
Giles	Indianapolis	Hourly
Small	Indianapolis	Hourly
Tillman	Chicago	Hourly
Gross	St. Louis	Hourly

Group results by this column

Cost Centers(1)	Pay Type
St. Louis	Hourly
Indianapolis	Hourly
St. Louis	Hourly
Chicago	Hourly
St. Louis	Hourly
Indianapolis	Hourly
Indianapolis	Hourly
Chicago	Hourly
St. Louis	Hourly
Chicago	Hourly

Column Filter  
=

CANCEL APPLY

Sort Ascending ↑  
Sort Descending ↓

Remove  
Group  
Column Settings...

# Removing Columns

Remove column

LAST NAME	COST CENTERS(1)	PAY TYPE
Edwards	St. Louis	Hourly
Wilcox	Indianapolis	Hourly
Harrell	St. Louis	Hourly
Decker	Chicago	Hourly
Edwards	St. Louis	Hourly
Giles	Indianapolis	Hourly
Small	Indianapolis	Hourly
Tillman	Chicago	Hourly
Gross	St. Louis	Hourly

Remove column

Cost Centers(1)	Pay Type
Edwards	St. Louis
Wilcox	Indianapolis
Harrell	St. Louis
Decker	Chicago
Edwards	St. Louis
Giles	Indianapolis
Small	Indianapolis
Tillman	Chicago
Gross	St. Louis
Holloway	Chicago

Column Filter

Clear Filter

Column Filter =

CANCEL APPLY

Sort Ascending ↑

Sort Descending ↓

Remove

Group

Column Settings...



# Charts & Graphs

← Employee Information

HIRE TERMINATE REHIRE VIEW SELECTED ...

Page 1 of 4 1 - 10 of 34 Rows Saved: Cost Center 1 Columns (1) (1)

	Employee Id	Username	First Name	Last Name	Cost Centers(1)	Pay Type	In Payroll	Locked	#	Employee Status	Extern
<input type="checkbox"/>	1000	Alan.Edwards	Alan	Edwards	St. Louis	Hourly					
<input type="checkbox"/>	1028	Adil.Wilcox	Adil	Wilcox	Indianapolis	Hourly					
<input type="checkbox"/>	1033	Anel.Harrell	Anel	Harrell	St. Louis	Hourly					
<input type="checkbox"/>	1003	Amy.Decker	Amy	Decker	Chicago	Hourly					
<input type="checkbox"/>	1004	Ben.Edwards	Ben	Edwards	St. Louis	Hourly					
<input type="checkbox"/>	1005	Bruce.Giles	Bruce	Giles	Indianapolis	Hourly					
<input type="checkbox"/>	1006	Chad.Small	Chad	Small	Indianapolis	Hourly					
<input type="checkbox"/>	1027	Clair.Tillman	Clair	Tillman	Chicago	Hourly	Yes			Active	
<input type="checkbox"/>	1008	Curt.Gross	Curt	Gross	St. Louis	Hourly	Yes			Active	
<input type="checkbox"/>	1009	Danny.Holloway	Danny	Holloway	Chicago	Hourly	Yes			Active	

Select the ellipses and click Add Chart

Cost Center	Count
St. Louis	12
Chicago	13

Pay Type	Count
Hourly	26

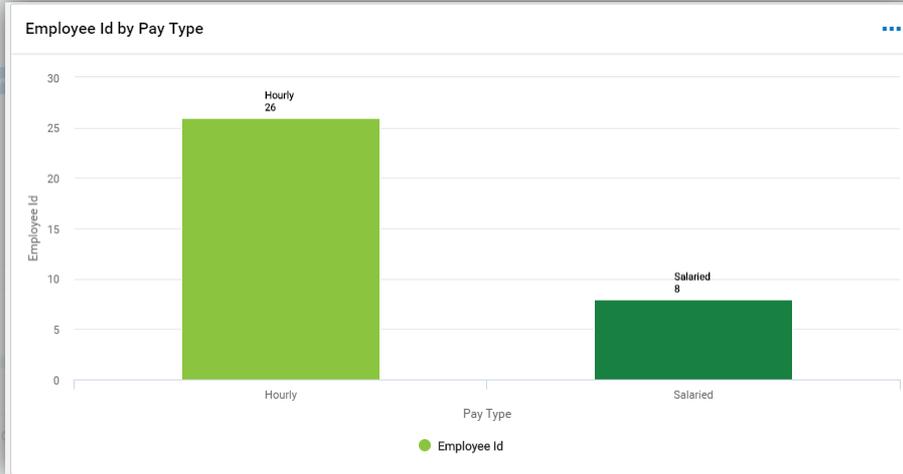
Employee Id by Cost Centers(1) ...

Employee Id by Pay Type ...

Select Charts  
Add Chart  
Print

# Charts & Graphs

Choose your chart type,  
Data, Display, and Title.  
Then click Save



Important Note: Data options available in the chart are based on visible columns in your report data

### Edit Chart

**Chart Type \***

**Data**

Category (X-axis) \*

Pay Type

Show as a stacked chart

Metric (Y-axis) \*

Employee Id

Value Calculation \*

Count

**Chart Display**

Category Title (X-axis)

Metric Title (Y-axis)

Category Labels (X-axis)

Data Labels (Y-axis)

Title \*

Employee Id by Pay Type

