

# HR Reports User Guide

Last Updated August 22, 2017    Last Updated By Elizabeth Garcia

## Contents

- HR Reports User Guide ..... 1
- File Description/Purpose..... 3
- About HR Reports ..... 3
- Access and Security..... 3
- Documentation ..... 3
- Accessing HR Reports..... 3
- Introduction to Interactive Grid..... 6
- Using the Interactive Grid ..... 7
- Searching in an Interactive Grid..... 7
- Rearrange Columns Using Drag and Drop ..... 9
- Resizing Columns in an Interactive Grid..... 10
- Sorting Columns in an Interactive Grid ..... 10
- Column Heading Menu ..... 11
- Creating a Control Break in an Interactive Grid ..... 12
- Creating an Aggregation with the Column Heading Menu ..... 14
- Freezing Columns in Place..... 15
- Unfreeze Frozen Column ..... 16
- Hiding Columns in an Interactive Grid ..... 17
- Filtering with the Column Heading Menu..... 19
- About the Actions Menu in an Interactive Grid ..... 20
- Filtering an Interactive Grid ..... 22
- Filter Operator Descriptions ..... 23
- Creating an Aggregation in an Interactive Grid ..... 24
- Adding Highlighting to an Interactive Grid ..... 25
- Creating a Control Break..... 27
- Using Charts in an Interactive Grid ..... 29
- Saving Interactive Grids ..... 31

Renaming a Private Report in an Interactive Grid .....	34
Deleting a Private Report in an Interactive Grid .....	35
Resetting Interactive Grids.....	36
Downloading an Interactive Grid .....	37
Interactive Reports.....	41

## File Description/Purpose

This document describes the functionality of HR Reports including report navigation, add or removing columns, filtering the report, formatting the report, saving customized reports, and downloading reports.

## About HR Reports

HR Reports searches HR data stored in UNM's Operational Data Store (ODS) to create reports. The ODS includes Banner data which is updated nightly. HR Reports allow the user to customize reports by adding/removing columns, adding/removing grouping levels, changing sort orders, and filtering data, creating charts, and making other changes. HR Reports was upgraded on August 5<sup>th</sup>, 2017. The upgrade introduced Interactive Grids (IG). In previous versions of HR Reports, users were accustomed to using Interactive Reports (IR). The differences will be discussed in more detail in this document. All screen shots and sample data in this document references fake employee data that ships with the platform used to build HR Reports.

## Access and Security

HR Reports implements org security rules which limit report results to records that are within the user BAR approved org codes.

HR Report requires at least one of the following roles:

- HR Reports Viewer for Departments
- HR Reports Viewer for Departments – Sensitive

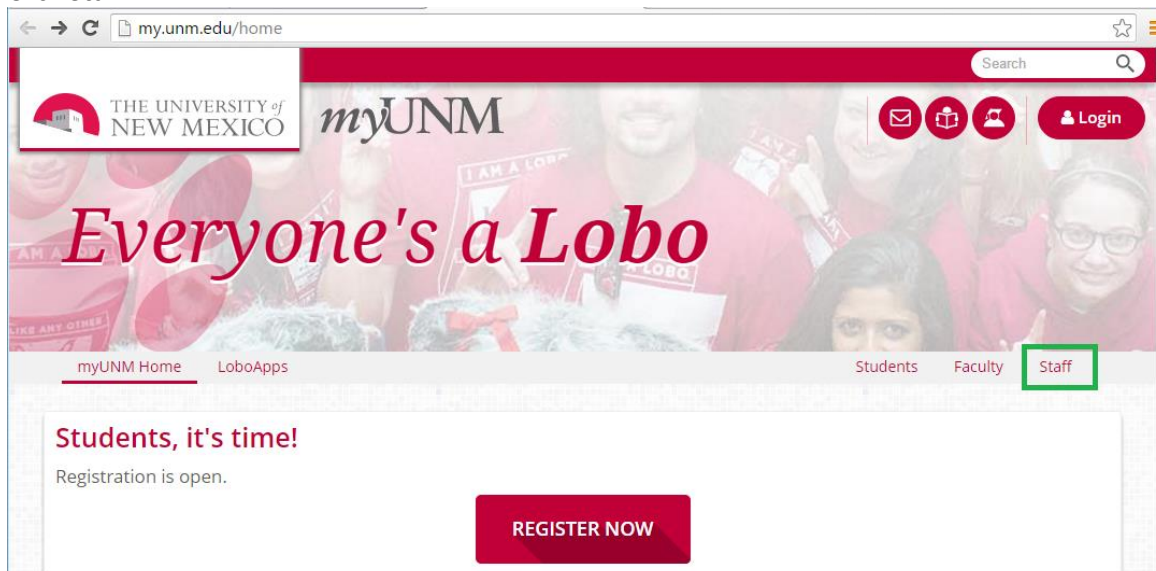
Additional BAR roles may be required to view some reports and/or some report columns.

## Documentation

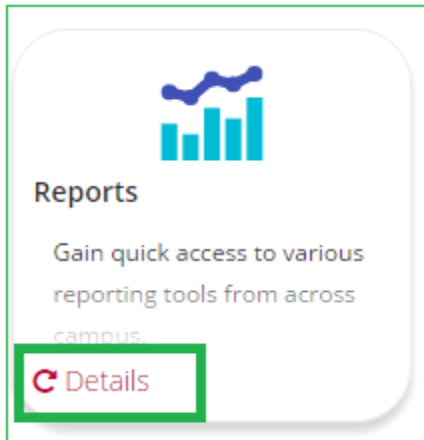
### Accessing HR Reports

There are two ways to access HR Reports:

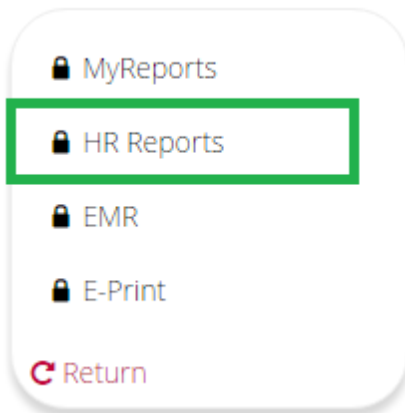
1. Go to: <https://hrreports.unm.edu> OR
2. Go to: <https://my.unm.edu>
3. Click **Staff**



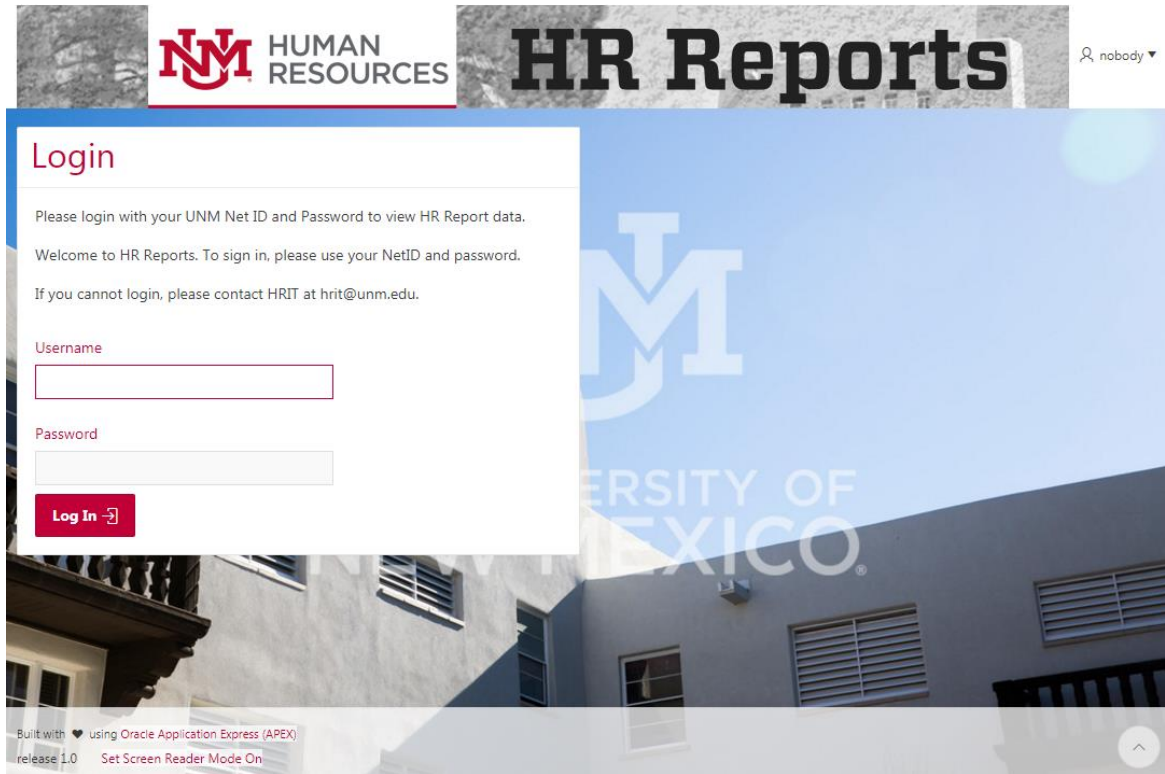
4. Click **Details** on the **Reports** card



5. Click **HR Reports**



6. Log in with your NetID and Password



7. From the list of applications\*, click on the **Employee Application**.

\*The list of application(s) that is displayed is determined by the approved BAR security role(s) per user.

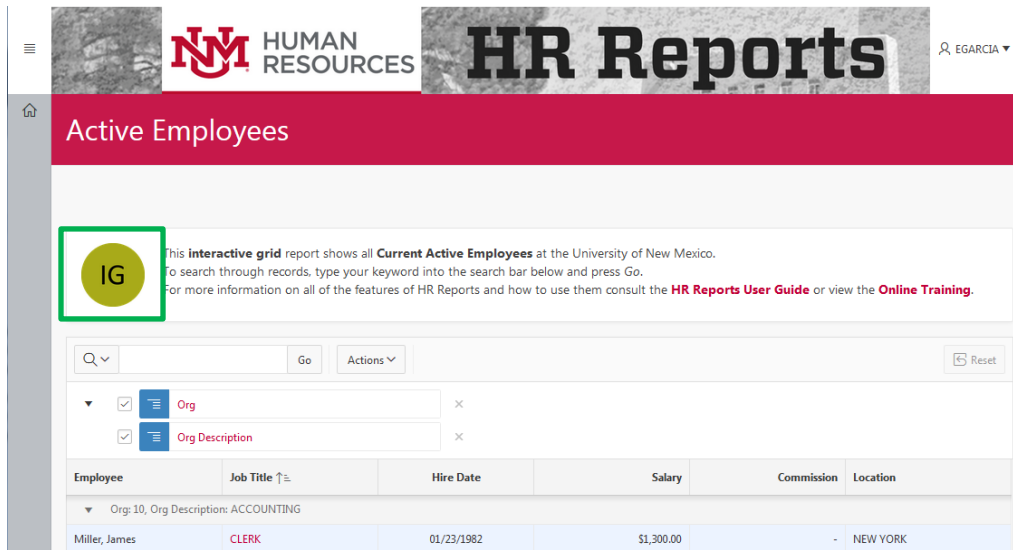


## Introduction to Interactive Grid

The Interactive Grid (IG) is very similar to current state Interactive Reports (IR). The IG presents users a set of data in a searchable, customizable report. The IG provides several capabilities for changing how the data is displayed. There are new options in the Actions menu and the ability to rearrange report only using the mouse.

There are currently over 300 reports within the HR Reports system. All IR's will need to be converted to IG's. The HRIT development team is currently evaluating the most used reports and will work on transitioning the more frequently used reports first. Until the conversion is complete, users can easily identify between an IG and IR based on the icon displayed at the top of the report data.

### Interactive Grid Icon:



This **interactive grid** report shows all **Current Active Employees** at the University of New Mexico. To search through records, type your keyword into the search bar below and press Go. For more information on all of the features of HR Reports and how to use them consult the [HR Reports User Guide](#) or view the [Online Training](#).

Search:  Go Actions

Org  x  
Org Description  x

Employee	Job Title ↑	Hire Date	Salary	Commission	Location
Org: 10, Org Description: ACCOUNTING					
Miller, James	CLERK	01/23/1982	\$1,300.00	-	NEW YORK

### Interactive Report Icon:



This **interactive report** shows all **Current Active Employees** at the University of New Mexico. To search through records, type your keyword into the search bar below and press Go. For more information on all of the features of HR Reports and how to use them consult the [HR Reports User Guide](#) or view the [Online Training](#).

Search:  Go Rows: 50 Actions

Row text contains 'tom'  x  
Org  x  
Org Description  x

Org: 10, Org Description: ACCOUNTING

Employee Name ↑	Job Title	Hire Date	Salary	Commission
Clark, Lisa	Manager	06/09/1981	\$2,450.00	-

## Using the Interactive Grid

### Searching in an Interactive Grid

Search the IG by entering criteria into the Search Bar then click on the **Go** button. For example, if the text **Manager** is entered into the search box, any row of data that has the text **Manager** will be displayed.

## Active Employees

IG

This **interactive grid** report shows all **Current Active Employees** at the University of New Mexico. To search through records, type your keyword into the search bar below and press **Go**. For more information on all of the features of HR Reports and how to use them consult the [HR Reports User Guide](#) or view the [Online Training](#).

Org

×

Org Description

×

Employee	Job Title ↑	Hire Date	Salary	Commission	Location
▼ Org: 10, Org Description: ACCOUNTING					
Miller, James	CLERK	01/23/1982	\$1,300.00	-	NEW YORK
Clark, Lisa	MANAGER	06/09/1981	\$2,450.00	-	NEW YORK

All rows matching the text **Manager** are displayed. Notice a new filter is created. When the checkbox is checked, the filter is applied. Unchecking the filter will revert to the original data set displayed in the report.

▽
Search for 'Manager'

×

Org

×

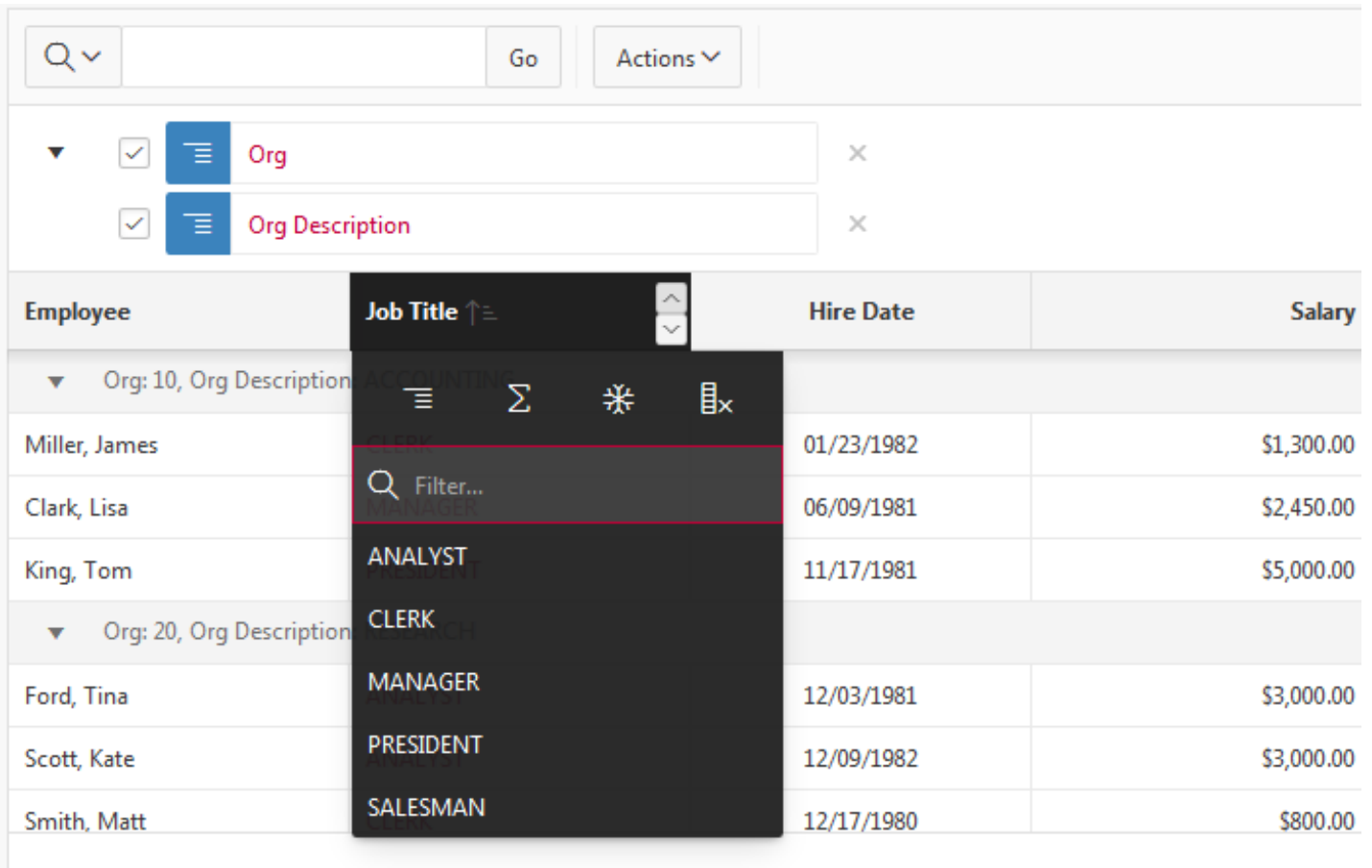
Org Description

×

Employee	Job Title ↑	Hire Date	Salary	Commission	Location
▼ Org: 10, Org Description: ACCOUNTING					
Clark, Lisa	MANAGER	06/09/1981	\$2,450.00	-	NEW YORK
▼ Org: 20, Org Description: RESEARCH					
Jones, Robert	MANAGER	04/02/1981	\$2,975.00	-	DALLAS
▼ Org: 30, Org Description: SALES					
Blake, Crystal	MANAGER	05/01/1981	\$2,850.00	-	CHICAGO

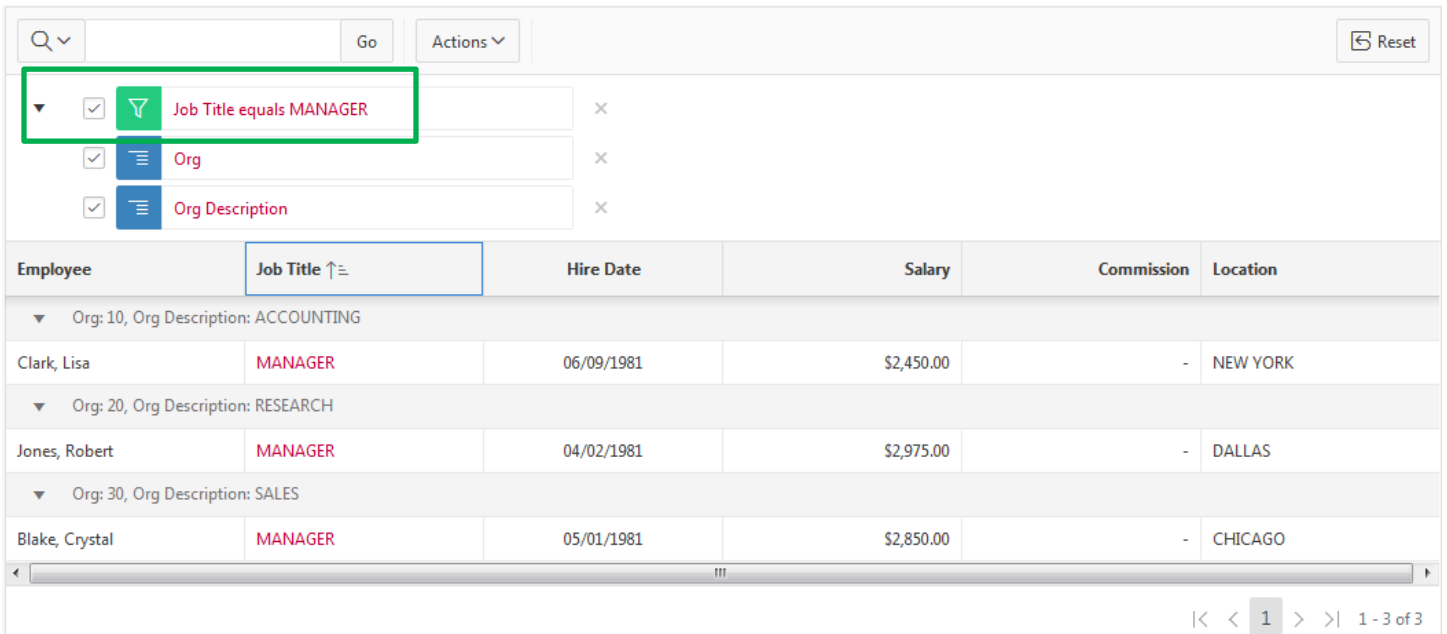
|< < 1 > >| 1 - 3 of 3

Another way to filter data is to click on the column heading. You can either select the values from the list or type text.



Employee	Job Title	Hire Date	Salary
▼ Org: 10, Org Description			
Miller, James		01/23/1982	\$1,300.00
Clark, Lisa		06/09/1981	\$2,450.00
King, Tom		11/17/1981	\$5,000.00
▼ Org: 20, Org Description			
Ford, Tina		12/03/1981	\$3,000.00
Scott, Kate		12/09/1982	\$3,000.00
Smith, Matt		12/17/1980	\$800.00

Selecting the **Manager** Job Title displays the same result as above. Notice the filter criteria is displayed.

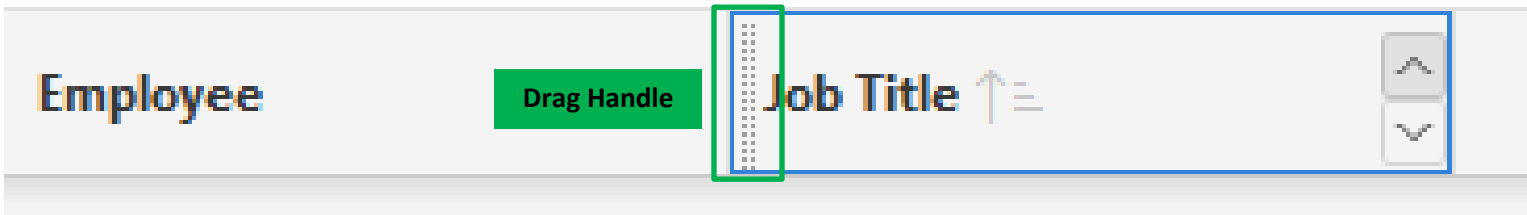


Employee	Job Title	Hire Date	Salary	Commission	Location
▼ Org: 10, Org Description: ACCOUNTING					
Clark, Lisa	MANAGER	06/09/1981	\$2,450.00	-	NEW YORK
▼ Org: 20, Org Description: RESEARCH					
Jones, Robert	MANAGER	04/02/1981	\$2,975.00	-	DALLAS
▼ Org: 30, Org Description: SALES					
Blake, Crystal	MANAGER	05/01/1981	\$2,850.00	-	CHICAGO

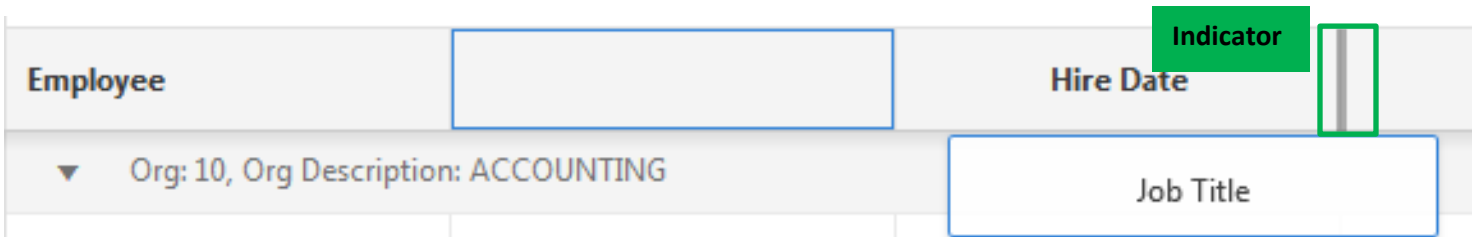


### Rearrange Columns Using Drag and Drop

Drag and drop a column into place by clicking and holding the drag handle on the column heading. Hover the mouse over the column heading to display the drag handle.



The mouse cursor changes to blue when it comes into contact with the drag handle. Click and hold the drag handle and drag the column to the desired location. While holding the mouse, use the indicator to determine which column to place the dragged column.



Release the mouse to complete moving the column. In this example, the **Job Title** column was moved after the **Hire Date** column.

Employee	Hire Date	Job Title ↑☰	Salary	Commission	Location
▼ Org: 10, Org Description: ACCOUNTING					
Miller, James	01/23/1982	CLERK	\$1,300.00	-	NEW YORK
Clark, Lisa	06/09/1981	MANAGER	\$2,450.00	-	NEW YORK
King, Tom	11/17/1981	PRESIDENT	\$5,000.00	-	NEW YORK
▼ Org: 20, Org Description: RESEARCH					
Ford, Tina	12/03/1981	ANALYST	\$3,000.00	-	DALLAS
Scott, Kate	12/09/1982	ANALYST	\$3,000.00	-	DALLAS
Smith, Matt	12/17/1980	CLERK	\$800.00	-	DALLAS

|< < 1 > >| 1 - 14 of 14

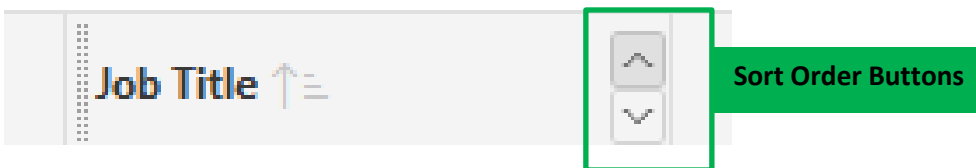
### Resizing Columns in an Interactive Grid

Resize the width of a column by clicking and holding the edge of a column heading and adjust with the mouse.

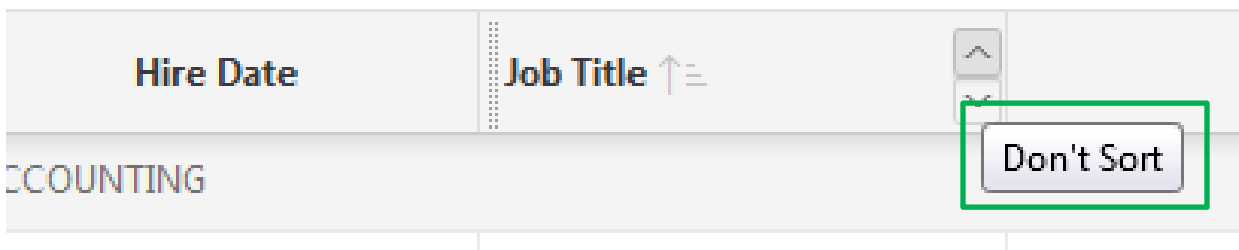


### Sorting Columns in an Interactive Grid

Hover the mouse in the column heading. The Sort Ascending and Sort Descending buttons display. Click the up arrow to sort **ascending** (A to Z, 1 to 9, earliest to latest). Click the down arrow to sort **descending** (Z to A, 9 to 1, latest to earliest).



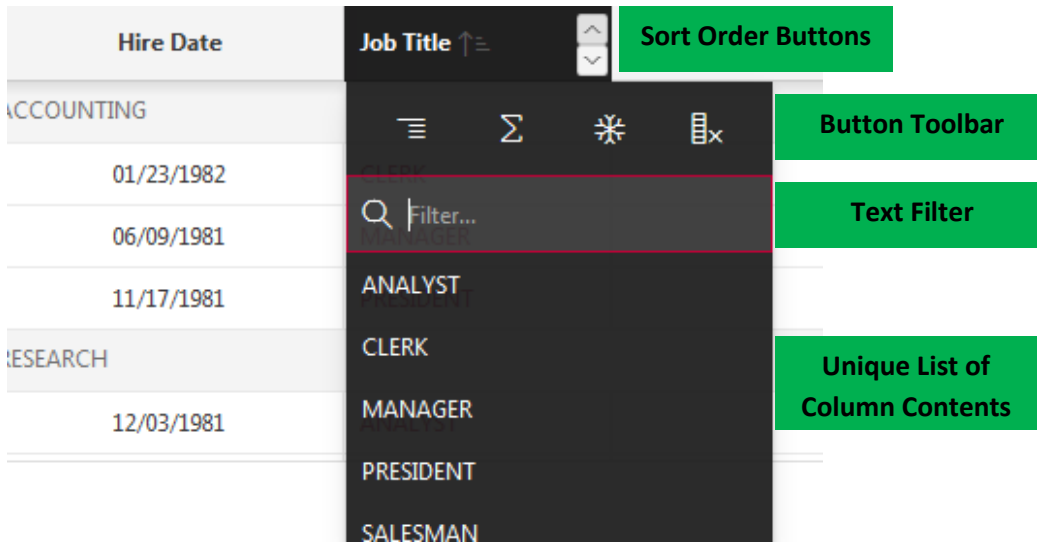
To remove the sort, click the toggled button again, now labeled Don't Sort.



## Column Heading Menu

The Column Heading Menu contains buttons to sort, break, aggregate, freeze, hide a column, and text filter for searching within a column.

Click on the column heading to display the Column Heading Menu.



### *Sort Order Buttons*

The Sort Ascending and Sort Descending buttons appear at the right of every column heading.

### *Button Toolbar*

The toolbar on the Column Heading menu contains the buttons and functions.

### *Control Break*

Creates a Control Break in the IG based on the selected column.

### *Aggregate*

Opens the Aggregation dialog to define an aggregation against the selected column.

### *Freeze*

Freezes the selected column in place, preventing horizontal scrolling.

### *Hide*

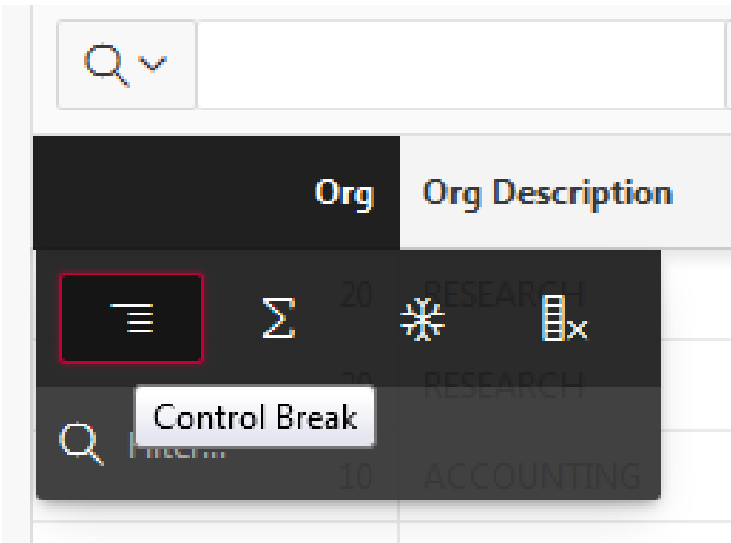
Hides the selected column from view.

### *Text Filter*

The text filter dynamically limits the list of column contents based on the text string entered into the filter field.

**Creating a Control Break in an Interactive Grid**

Click on the column heading of the desired control break then click on the Control Break button in the Column Heading Menu.




After clicking the Control Break button, the break is created.


A screenshot of a table interface showing a control break applied to the 'Org' column. The table has columns: 'Org Description', 'Employee', 'Job Title', and 'Hire Date'. The 'Org' column is highlighted with a blue box, and a green box highlights the column heading menu for 'Org', which includes a dropdown arrow, a checkmark, a hamburger menu icon, and the text 'Org'. The table data is as follows:

Org Description	Employee	Job Title	Hire Date
▼ Org: 10			
ACCOUNTING	Miller, James	CLERK	01/23/198
ACCOUNTING	Clark, Lisa	MANAGER	06/09/198
ACCOUNTING	King, Tom	PRESIDENT	11/17/198

The same process is repeated to include the Org Description in the control break.

Q  Go Actions


 Org


 Org Description

Employee	Job Title ↑≡	Hire Date
▼ Org: 10, Org Description: ACCOUNTING		
Miller, James	CLERK	01/23/1982
Clark, Lisa	MANAGER	06/09/1981

Notice the arrow. In this example, the arrow was clicked on Org 10 to collapse the data.


Q  Go Actions


 Org

 Org Description

Employee	Job Title ↑≡	Hire Date	Salary	Commission	Location
▶ Org: 10, Org Description: ACCOUNTING					
▼ Org: 20, Org Description: RESEARCH					
Ford, Tina	ANALYST	12/03/1981	\$3,000.00	-	DALLAS
Scott, Kate	ANALYST	12/09/1982	\$3,000.00	-	DALLAS
Smith, Matt	CLERK	12/17/1980	\$800.00	-	DALLAS
Adams, Joe	CLERK	01/12/1983	\$1,100.00	-	DALLAS
Jones, Robert	MANAGER	04/02/1981	\$2,975.00	-	DALLAS
▼ Org: 30, Org Description: SALES					
James, Mary	CLERK	12/03/1981	\$950.00	-	CHICAGO
Blake, Crystal	MANAGER	05/01/1981	\$2,850.00	-	CHICAGO

If you no longer want the control break(s) to display, simply click on the X next to the control break definition.

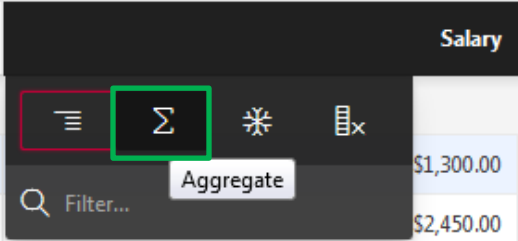
 Org

 Org Description

### Creating an Aggregation with the Column Heading Menu

Quickly apply an aggregation by clicking on the column heading of the desired aggregation. In this example, click on the Salary column heading and then the Aggregate icon.

Hire Date	Salary
01/23/1982	\$1,300.00
06/09/1981	\$2,450.00
11/17/1981	\$5,000.00
12/03/1981	\$3,000.00
12/09/1982	\$3,000.00




The dialog window appears. Click on the + button to define a new aggregation.

Aggregation

✕

Enabled	Column	Aggre...
<input checked="" type="checkbox"/>	Salary	Sum

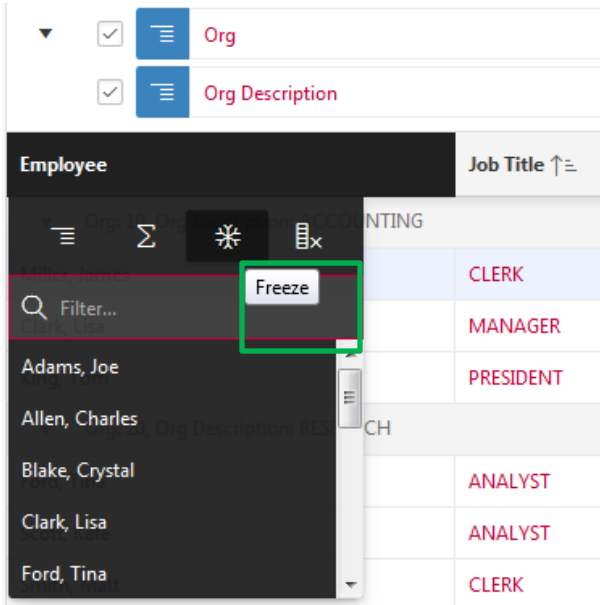
  
 null

+
-

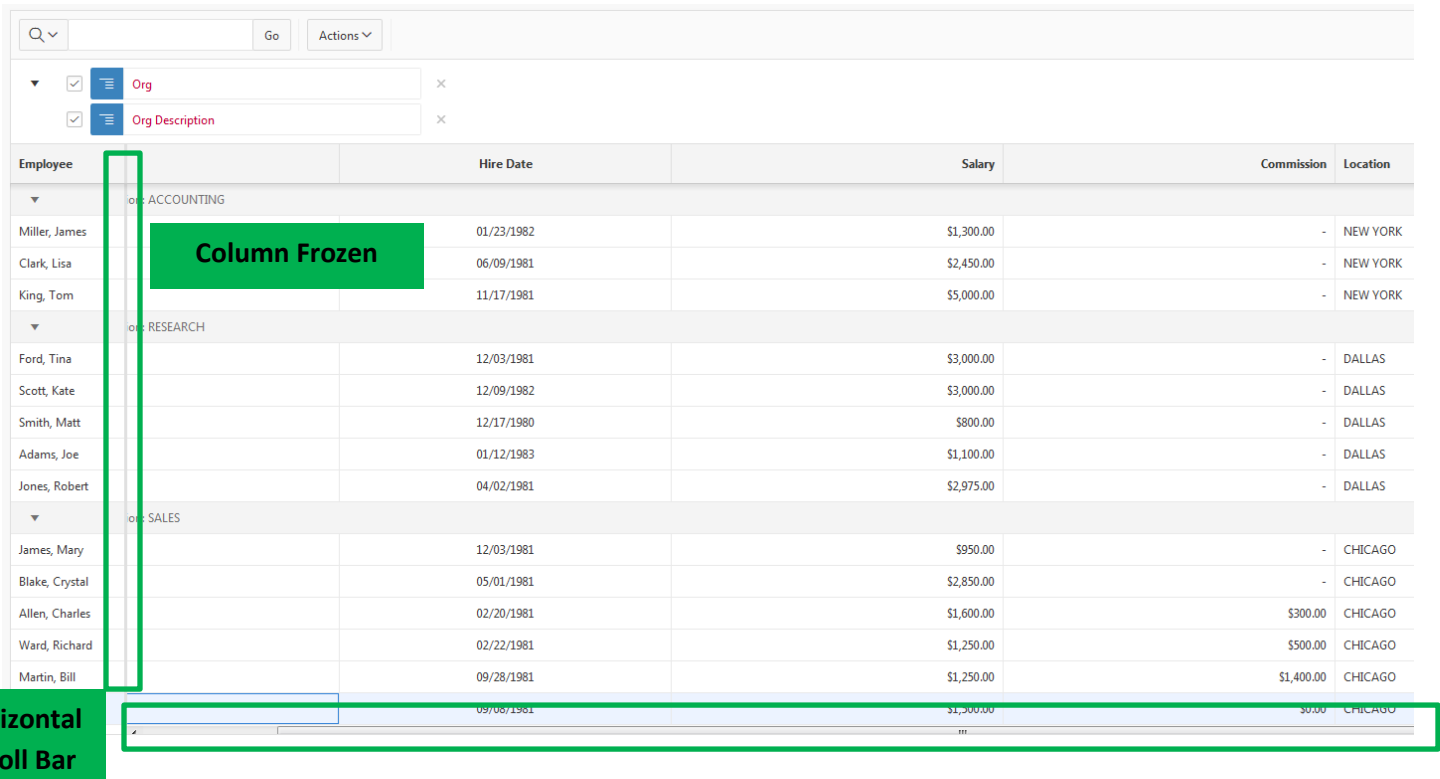
Help Cancel Save

### Freezing Columns in Place

Freeze a column in place by clicking on the Freeze icon in the Column Heading menu. Freezing a column excludes it from the scrollable area so that the frozen column is always visible. In this example, click on the **Employee** column and click on the **Freeze** icon.

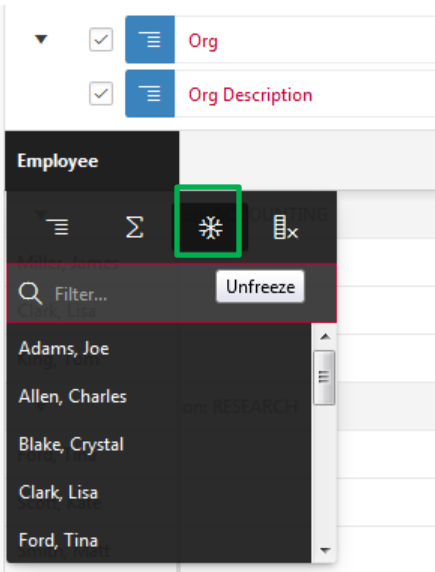


After freezing, notice the grey line created at the end of the **Employee** column that indicates the column is frozen. Using the horizontal scroll bar at the bottom of the page keeps the column visible even though other columns are out of the visible pane.



## Unfreeze Frozen Column

To unfreeze a frozen column, reopen the Column Heading menu and click the **Unfreeze** icon (snowflake).



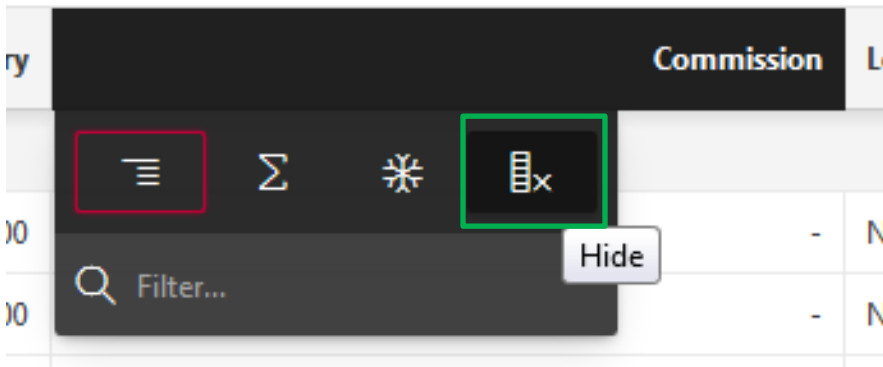
Notice the grey line after the **Employee** column is removed after clicking the Unfreeze icon.

Employee	Job Title ↑≡	Hire Date	Salary
▼ Org: 10, Org Description: ACCOUNTING			
Miller, James	CLERK	01/23/1982	\$1,300.00
Clark, Lisa	MANAGER	06/09/1981	\$2,450.00
King, Tom	PRESIDENT	11/17/1981	\$5,000.00
▼ Org: 20, Org Description: RESEARCH			
Ford, Tina	ANALYST	12/03/1981	\$3,000.00
Scott, Kate	ANALYST	12/09/1982	\$3,000.00
Smith, Matt	CLERK	12/17/1980	\$800.00
Adams, Joe	CLERK	01/12/1983	\$1,100.00
Jones, Robert	MANAGER	04/02/1981	\$2,975.00
▼ Org: 30, Org Description: SALES			
James, Mary	CLERK	12/03/1981	\$950.00
Blake, Crystal	MANAGER	05/01/1981	\$2,850.00
Allen, Charles	SALESMAN	02/20/1981	\$1,600.00
Ward, Richard	SALESMAN	02/22/1981	\$1,250.00
Martin, Bill	SALESMAN	09/28/1981	\$1,250.00
Turner, Bob	SALESMAN	09/08/1981	\$1,500.00



### Hiding Columns in an Interactive Grid

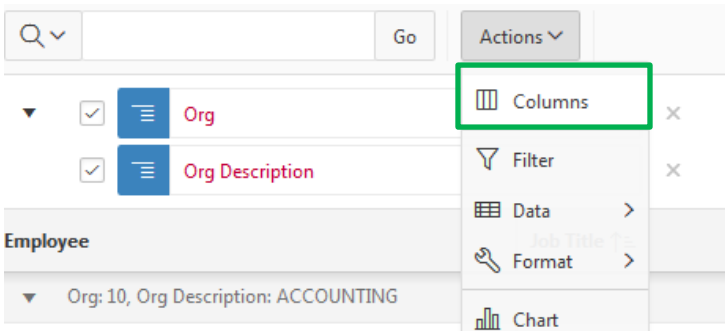
Hide a column in an interactive grid from view by clicking on the Hide icon in the Column Heading menu. In this example, the Commission column will be hidden. Click on the Commission column heading, then click on the Hide icon.



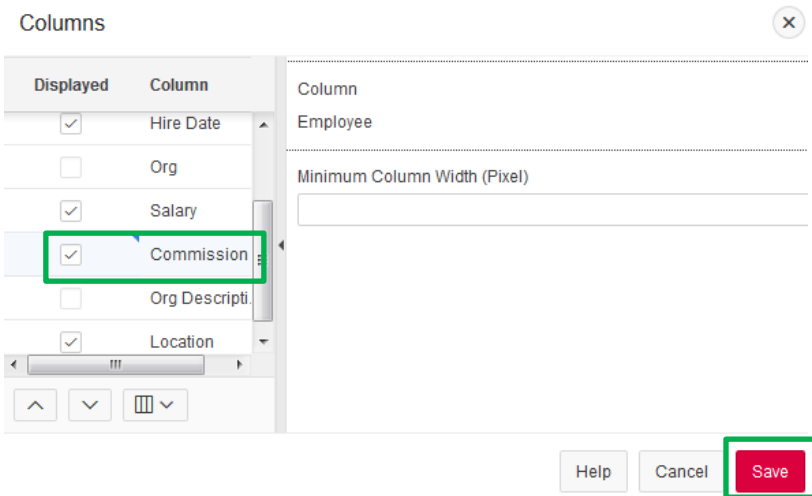
The column is no longer visible in the report.

Employee	Job Title ↑	Hire Date	Salary	Location
▼ Org: 10, Org Description: ACCOUNTING				
Miller, James	CLERK	01/23/1982	\$1,300.00	NEW YORK
Clark, Lisa	MANAGER	06/09/1981	\$2,450.00	NEW YORK
King, Tom	PRESIDENT	11/17/1981	\$5,000.00	NEW YORK
▼ Org: 20, Org Description: RESEARCH				
Ford, Tina	ANALYST	12/03/1981	\$3,000.00	DALLAS
Scott, Kate	ANALYST	12/09/1982	\$3,000.00	DALLAS
Smith, Matt	CLERK	12/17/1980	\$800.00	DALLAS
Adams, Joe	CLERK	01/12/1983	\$1,100.00	DALLAS
Jones, Robert	MANAGER	04/02/1981	\$2,975.00	DALLAS

To redisplay hidden columns, click on the **Actions** menus and select **Columns**.



Check the Commission checkbox and click the **Save** button.

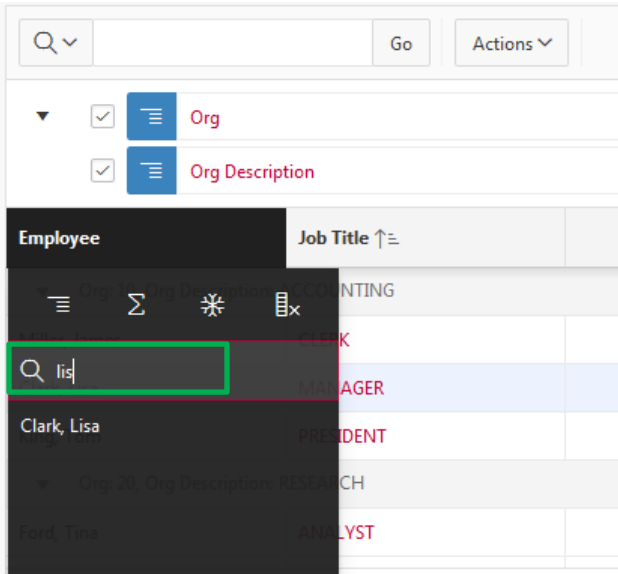


The Commission column is displayed on the report.

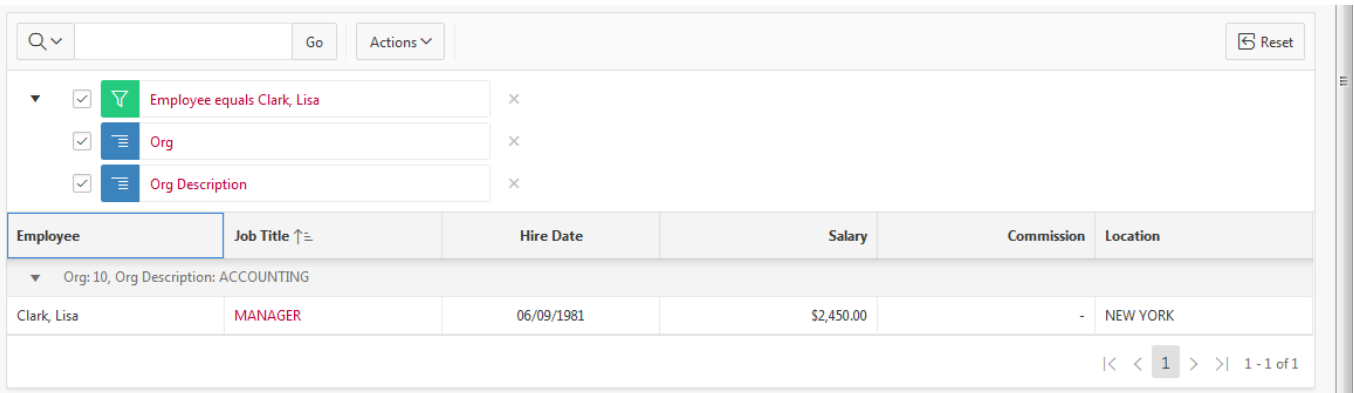
Employee	Job Title ↑	Hire Date	Salary	Commission	Location
▼ Org: 10, Org Description: ACCOUNTING					
Miller, James	CLERK	01/23/1982	\$1,300.00	-	NEW YORK
Clark, Lisa	MANAGER	06/09/1981	\$2,450.00	-	NEW YORK
King, Tom	PRESIDENT	11/17/1981	\$5,000.00	-	NEW YORK
▼ Org: 20, Org Description: RESEARCH					
Ford, Tina	ANALYST	12/03/1981	\$3,000.00	-	DALLAS

### Filtering with the Column Heading Menu

Filter an interactive grid by the contents of a column by entering keywords in the **Search** field of the Column Heading menu. For example, click on the Employee column and type lis.

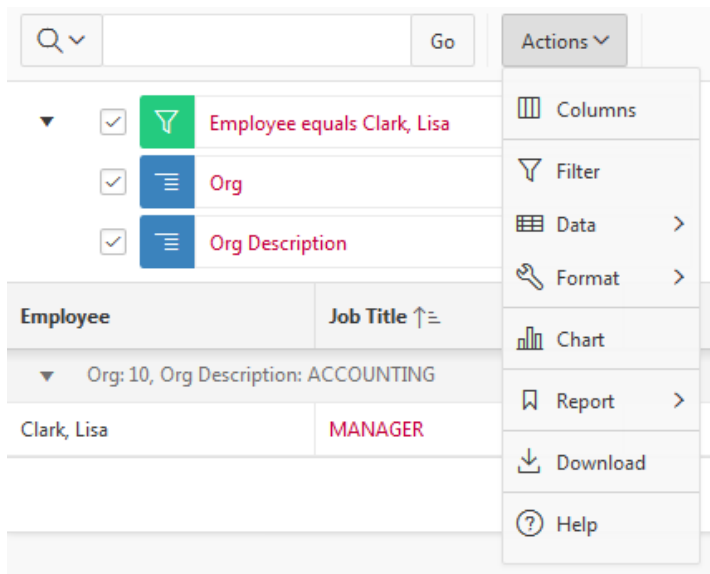


Click on **Clark, Lisa** and the report is filtered for this employee.



## About the Actions Menu in an Interactive Grid

The Actions menu contains functions and submenus for customizing and saving interactive grids.



### Columns

Displays the Columns dialog. Toggle which individual columns are visible in the interactive grid, in what order they appear, and specify their display width.

### Filter

Displays the Filters dialog. Configure data filters to limit the rows returned.

### Data Submenu

The Data submenu contains the following options:

- Sort – Change the columns to sort on and determine whether to sort in ascending or descending order.
- Aggregate – Perform mathematical computations against a column.
- Flashback – Reload the data as it existed at a previous point in time.
- Refresh – Repopulates the interactive grid with the most current data from the database.

### Format Submenu

The Format submenu contains the following options:

- Highlight – Customize the display of colors of a row, column, or individual cells of a grid. Advanced options are available for repeated values
- Control Break – Pull the columns out of the grid and display them as break groups.

### Chart

Displays the Chart dialog. Create a chart by selecting a chart type and configuring the required fields.

### *Report Submenu*

The Report submenu contains the following options:

- Save – Saves changes to the current interactive grid
- Save As – Save a new report of the interactive grid (you must rename the report and select the report type).
- Edit – Change the interactive grid report's name or type, depending on your privileges.
- Delete – Deletes the current view of the interactive grid (not available for Primary reports).
- Reset – Resets the interactive grid to the last saved state.

### *Download*

Displays the Download dialog. Download the interactive grid as a .csv file.

### *Help*

Launches a new window containing a summary of how to use interactive grids.

### *Chart*

Displays the Chart dialog. Create a chart by selecting a chart type and configuring the required fields.

### Filtering an Interactive Grid

You can narrow the contents of an interactive grid by applying a filter to it. Once applied, filters can be temporarily enabled or disabled or removed permanently directly in the interactive grid. You can also click the filter name for quick reconfiguration.

Employee	Job Title ↑	Hire Date	Salary	Commission	Location
Org: 10, Org Description: ACCOUNTING					
Clark, Lisa	MANAGER	06/09/1981	\$2,450.00	-	NEW YORK

Existing filters display between the search bar and the grid. Instead of deleting a filter, you can disable it by deselecting the adjacent checkbox. You can leave your filter disabled and save your report to preserve it for future usage.

To edit a filter, you can click its name or open the Filters dialog and select it in the list.

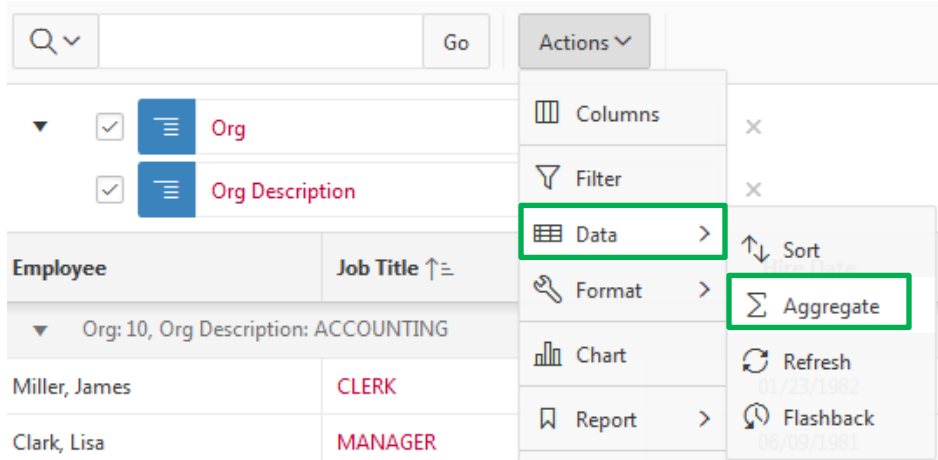
You can permanently remove a filter by clicking the adjacent **Remove Filter** icon (X) or by removing it from the list in the Filters dialog.

**Filter Operator Descriptions**

<b>Operator</b>	<b>Description</b>	<b>Description/Example</b>
=	Equals	Eclass = SE Only employees with eClass SE will show on the report.
!=	Not equal to	Eclass != SE Employees with all eclasses <i>except</i> SE will show on the report.
is null	No data in field	All records with no data in this field will show.
is not null	Has data in field	Will only return records that have data in the selected field. For example, Supervisor is not null will only show employees who have a supervisor entered on their job record.
like	Partial match	Like is used to create partial matches with text column values. For example: Position Title Like %assist% will show all employees who have the letters “assist” somewhere in their job title. Use the % wildcard.
not like	Excludes partial matches	Not Like <i>excludes</i> all records that have the data entered. For example: EClass not like S% will show all active employees except staff eClasses (Staff eClasses all begin with S)
in	Includes any of the values entered	Enter each value you are looking for separated by a comma. For example:  EClass in SC, SE, SN, SP, SU, SW will filter records to only show regular staff employees.
not in	Excludes any of the values entered	Enter each value you would like to exclude from the report. Separate each entry with a comma. For example EClass not in SC, SE, SN, SP, SU, SW will filter records to show all employees except regular staff employees.
contains	Shows only records that have the selected values	For example, Supervisor contains Duran, Michael will only show employees who are supervised by Duran Michael.
does not contain	Does not show records with the selected values	For example, EClass contains SE will show all records where the eClass is not SE.
matches regular expression	This filter operates like the contains and in filters	

## Creating an Aggregation in an Interactive Grid

Create an aggregation by selecting Data in the Actions menu, then Aggregate.



Employee	Job Title
Org: 10, Org Description: ACCOUNTING	
Miller, James	CLERK
Clark, Lisa	MANAGER

In this example, calculate the Average Salary by defining the following:

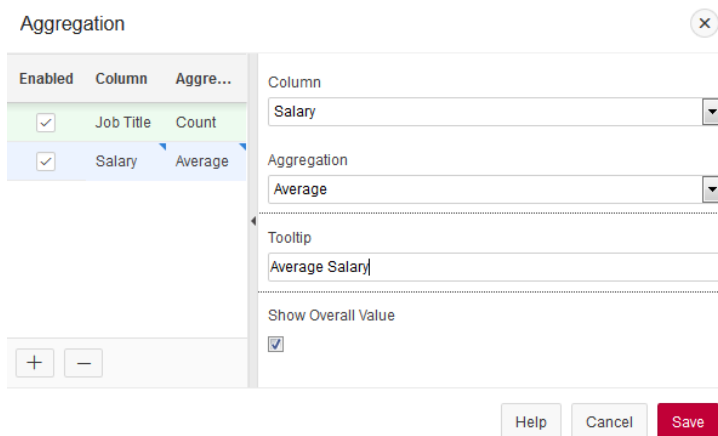
Column: **Salary**

Aggregation: **Average**

Tooltip: **Average Salary**

Check Show Overall Value

Click the **Save** button.



Enabled	Column	Aggre...
<input checked="" type="checkbox"/>	Job Title	Count
<input checked="" type="checkbox"/>	Salary	Average

Column: Salary

Aggregation: Average

Tooltip: Average Salary

Show Overall Value:

Buttons: Help, Cancel, Save

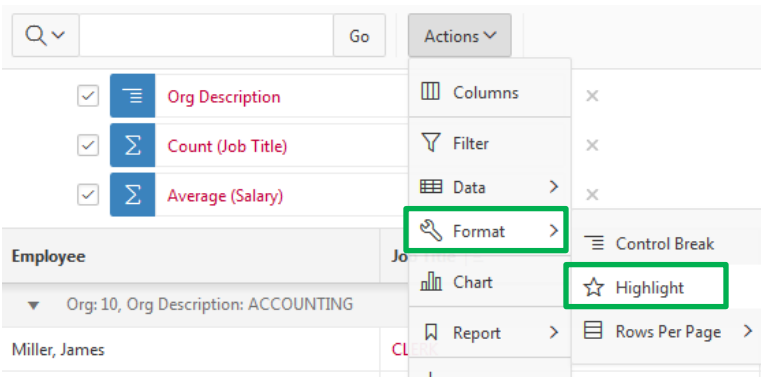


The Average Salary is displayed.

Employee	Job Title	Hire Date	Salary
Org: 10, Org Description: ACCOUNTING			
Miller, James	CLERK	01/23/1982	\$1,300.00
Clark, Lisa	MANAGER	06/09/1981	\$2,450.00
King, Tom	PRESIDENT	11/17/1981	\$5,000.00
			\$2,916.67

### Adding Highlighting to an Interactive Grid

Apply color effects to an interactive grid by selecting Format, then Highlight.



The screenshot shows the 'Actions' menu open over the grid. The 'Format' option is selected, and the 'Highlight' sub-option is highlighted. The grid data is partially visible in the background.

In this example, highlight anyone with a Salary greater than \$3,000. Define the following:

Name: **High Salary**

Highlight: **Column** (Only highlights the Salary column instead of entire row).

Column: **Salary**

Background Color: **Yellow**

Text Color: **Red**

Condition Type: **Column**

Column: **Salary**

Operator: **greater than**

Value: **3000**

Click the **Save** button.

Highlight ✕

Enabled	Name	Name
<input checked="" type="checkbox"/>	High Salary	High Salary

Highlight: **Column**

Column: **Salary**

Background Color: **#FFFF99** ✎ Colors      Text Color: **#FF7755** ✎ Colors

Condition Type: **Column**

Column: **Salary**      Operator: **greater than**

Value: **3000**

Help Cancel Save

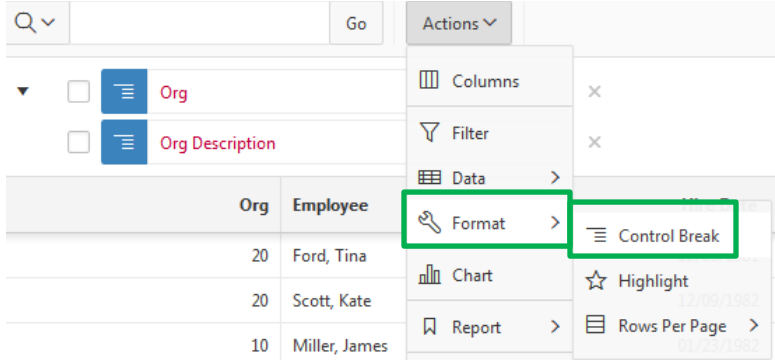
Q ▾
Go
Actions ▾
Reset

- Org ✕
- Org Description ✕
- High Salary Highlight ✕
- Count (Job Title) ✕
- Average (Salary) ✕

Employee	Job Title ↑⇅	Hire Date	Salary
▼ Org: 10, Org Description: ACCOUNTING			
Miller, James	CLERK	01/23/1982	\$1,300.00
Clark, Lisa	MANAGER	06/09/1981	\$2,450.00
King, Tom	PRESIDENT	11/17/1981	\$5,000.00
			\$2,916.67
	3		
▼ Org: 20, Org Description: RESEARCH			

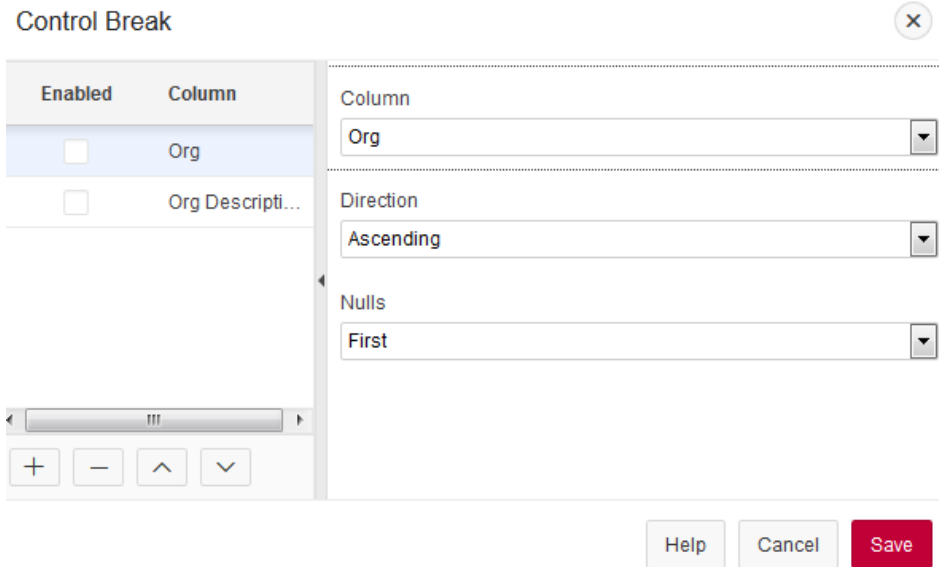
### Creating a Control Break

Creating a control break pulls the columns out of the interactive grid and displays them as a master record.



In this example, the Org and Org Description will be set as the control break so the data is grouped by Org and Org Description and defined by the following:

- Column: **Org**
  - Direction: **Ascending**
  - Nulls: **First**
- Click on the **Save** button.



Column: **Org**  
 Direction: **Ascending**  
 Nulls: **First**  
 Click on the **Save** button.

Control Break ✕

Enabled	Column
<input checked="" type="checkbox"/>	Org
<input checked="" type="checkbox"/>	Org Descripti...

Column: **Org Description**

Direction: **Ascending**

Nulls: **First**

The report breaks based on each Org and Org Description.

Q ▾ Go Actions ▾

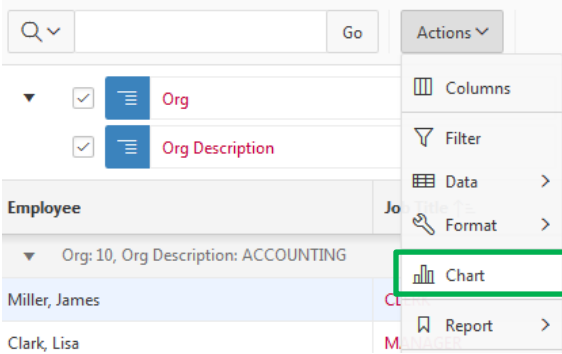
Org  
 Org Description
 Control Break(s)

Employee	Job Title ↑	Hire Date	Salary	Commission	Location
▼ Org: 10, Org Description: ACCOUNTING					
Miller, James	CLERK	01/23/1982	\$1,300.00	-	NEW YORK
Clark, Lisa	MANAGER	06/09/1981	\$2,450.00	-	NEW YORK
King, Tom	PRESIDENT	11/17/1981	\$5,000.00	-	NEW YORK
▼ Org: 20, Org Description: RESEARCH					
Ford, Tina	ANALYST	12/03/1981	\$3,000.00	-	DALLAS
Scott, Kate	ANALYST	12/09/1982	\$3,000.00	-	DALLAS
Smith, Matt	CLERK	12/17/1980	\$800.00	-	DALLAS
Adams, Joe	CLERK	01/12/1983	\$1,100.00	-	DALLAS
Jones, Robert	MANAGER	04/02/1981	\$2,975.00	-	DALLAS
▼ Org: 30, Org Description: SALES					
James, Mary	CLERK	12/03/1981	\$950.00	-	CHICAGO
Blake, Crystal	MANAGER	05/01/1981	\$2,850.00	-	CHICAGO
Allen, Charles	SALESMAN	02/20/1981	\$1,600.00	\$300.00	CHICAGO
Ward, Richard	SALESMAN	02/22/1981	\$1,250.00	\$500.00	CHICAGO
Martin, Bill	SALESMAN	09/28/1981	\$1,250.00	\$1,400.00	CHICAGO

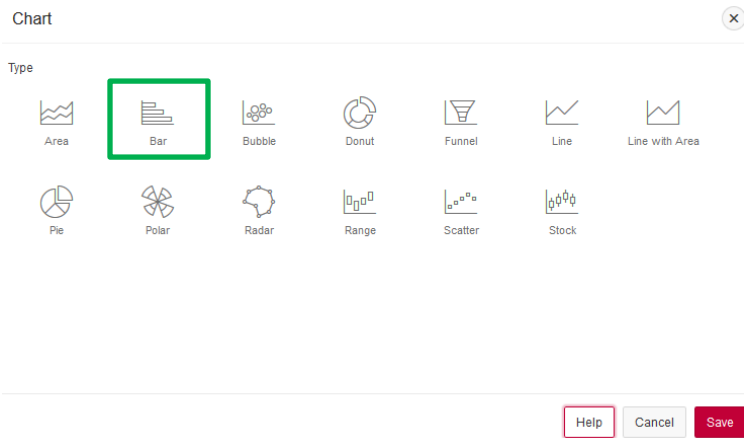
6454:3:15819397000274::NO:RP::#

### Using Charts in an Interactive Grid

A chart can be created based on your dataset. Go to the **Actions** menu and click on **Chart**.



In this example, chart the average salary by creating a Bar chart.



Use the scroll bar to scroll and define by the following:

Orientation: **Vertical**

Label: **Org**

Value: **Salary**

Aggregation: **Average**

Click the **Save** button.

Chart ✕

---

Orientation

Label

Value  
 Aggregation

Z  
 Aggregation

Series  
 Stack

The results chart the average salary per Org. Notice the new icon that appears. These icons allow you to toggle between the new chart and the report data.



## Saving Interactive Grids

Reports in interactive grids have varying uses and characteristics. End users interact with the Primary report of an interactive grid and can modify and save changes as a Private report.

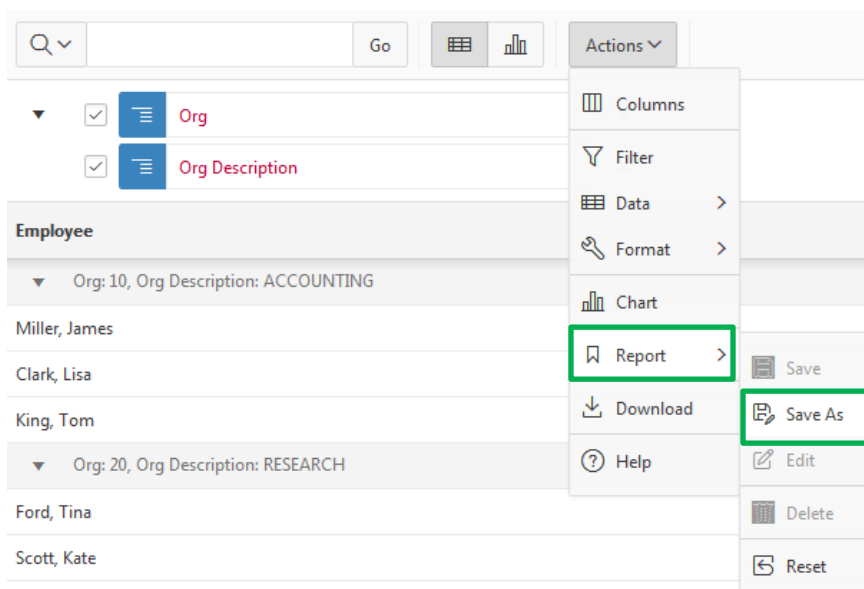
### Primary report

The default stat of an interactive grid is the **Primary** report. While users can customize the look and organization of a Primary report, they cannot overwrite or rename it. The Primary report is useful as a backup or a starting point for customizing new views of the interactive grid. Once a private report is saved, a drop-down list appears on the toolbar near the Search bar. The drop-down can be used to select between the reports.

### Private Report

Users can save a **Private** report of the interactive grid to preserve their changes. Examples include filters, aggregations, column order, visible columns, and other customizations. Private reports can only be viewed by the user who created the private report.

In this example, the Location column is not displayed. To save this change as a private report, go to the **Actions** menu, then **Report**, then **Save As**.



The screenshot shows a web application interface for an interactive grid. At the top, there is a search bar with a magnifying glass icon and a 'Go' button. To the right of the search bar are icons for a grid and a chart, and an 'Actions' dropdown menu. The grid displays a list of employees with columns for 'Org' and 'Org Description'. The 'Org' column is currently expanded to show 'Org: 10, Org Description: ACCOUNTING'. The 'Actions' menu is open, showing options: Columns, Filter, Data, Format, Chart, Report, Download, and Help. The 'Report' option is highlighted with a green box, and the 'Save As' option is also highlighted with a green box. Other options in the menu include Save, Edit, Delete, and Reset.

Enter a name to save the report. In this example, **Employee Report Without Location**. Click on the **Save** button.

Report - Save As
✕

---

Type

---

Name

Notice the new drop-down that appears.

Employee Report Without Location

Org

✕

Org Description

✕

Employee	Job Title ↑	Hire Date	Salary	Commission
▼ Org: 10, Org Description: ACCOUNTING				
Miller, James	CLERK	01/23/1982	\$1,300.00	-
Clark, Lisa	MANAGER	06/09/1981	\$2,450.00	-
King, Tom	PRESIDENT	11/17/1981	\$5,000.00	-
▼ Org: 20, Org Description: RESEARCH				
Ford, Tina	ANALYST	12/03/1981	\$3,000.00	-
Scott, Kate	ANALYST	12/09/1982	\$3,000.00	-
Smith, Matt	CLERK	12/17/1980	\$800.00	-
Adams, Joe	CLERK	01/12/1983	\$1,100.00	-
Jones, Robert	MANAGER	04/02/1981	\$2,975.00	-
▼ Org: 30, Org Description: SALES				

1 - 13 of 14

32



This drop-down can be used to toggle between the Primary report and Private report.

Employee Report Without Location
▼

*Default*

Primary Report

*Private*

Employee Report Without Location

Org

Org Description

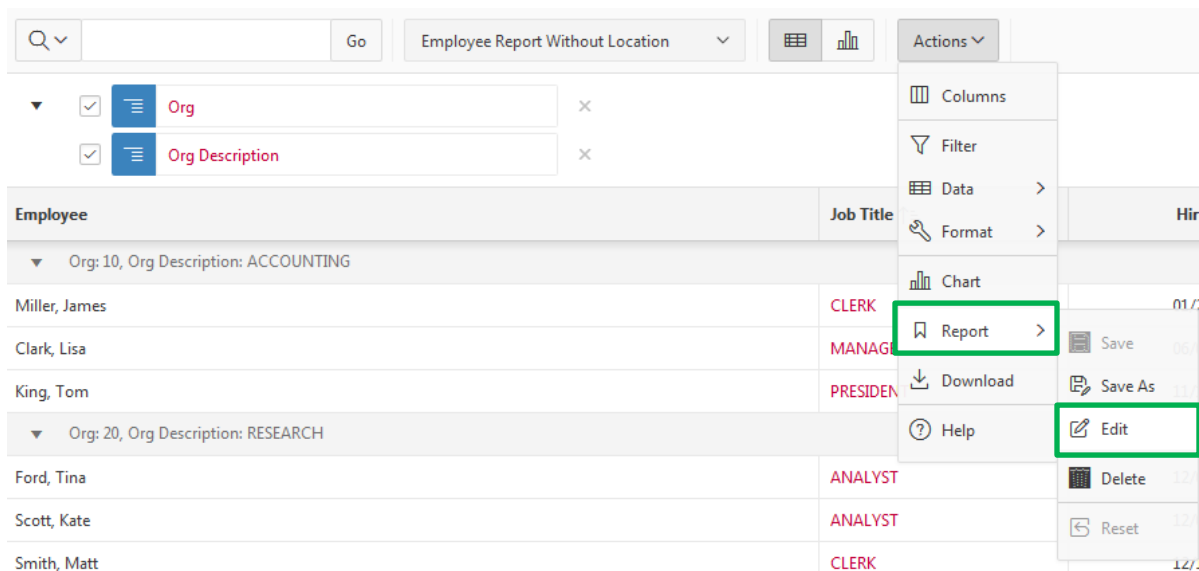
Employee	Job Title ↑	Hire Date	Salary	Commission
▼ Org: 10, Org Description: ACCOUNTING				
Miller, James	CLERK	01/23/1982	\$1,300.00	-
Clark, Lisa	MANAGER	06/09/1981	\$2,450.00	-
King, Tom	PRESIDENT	11/17/1981	\$5,000.00	-
▼ Org: 20, Org Description: RESEARCH				
Ford, Tina	ANALYST	12/03/1981	\$3,000.00	-
Scott, Kate	ANALYST	12/09/1982	\$3,000.00	-
Smith, Matt	CLERK	12/17/1980	\$800.00	-
Adams, Joe	CLERK	01/12/1983	\$1,100.00	-
Jones, Robert	MANAGER	04/02/1981	\$2,975.00	-
▼ Org: 30, Org Description: SALES				

|< < 1 2 > >| 1 - 13 of 14

33

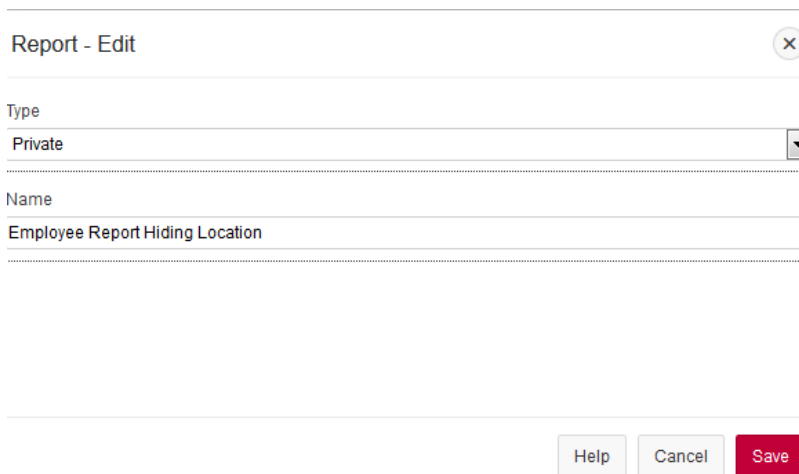
## Renaming a Private Report in an Interactive Grid

Change the name of the Private report by going to the Actions menu, Report, Edit.



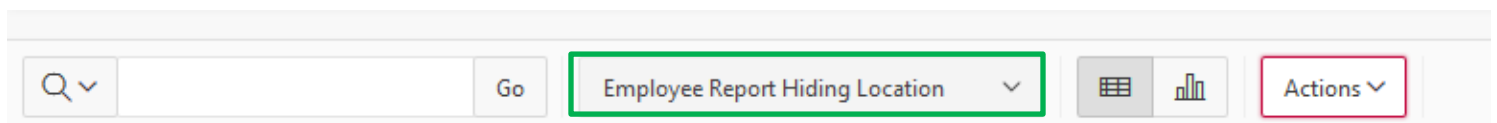
The screenshot shows an interactive grid with a search bar, a 'Go' button, and a dropdown menu currently set to 'Employee Report Without Location'. The grid contains columns for 'Employee', 'Job Title', and 'Hir'. A dropdown menu is open over the grid, showing options: Columns, Filter, Data, Format, Chart, Report, Download, and Help. The 'Report' option is highlighted with a green box, and its sub-menu is open, showing 'Edit' and 'Delete' options, with 'Edit' also highlighted by a green box.

For example, change the name from Employee Report without Location to Employee Report Hiding Location. Click the Save button.



The 'Report - Edit' dialog box is shown. It has a title bar 'Report - Edit' with a close button. Below the title bar, there is a 'Type' dropdown menu currently set to 'Private'. Below that is a 'Name' text input field containing the text 'Employee Report Hiding Location'. At the bottom of the dialog, there are three buttons: 'Help', 'Cancel', and 'Save'.

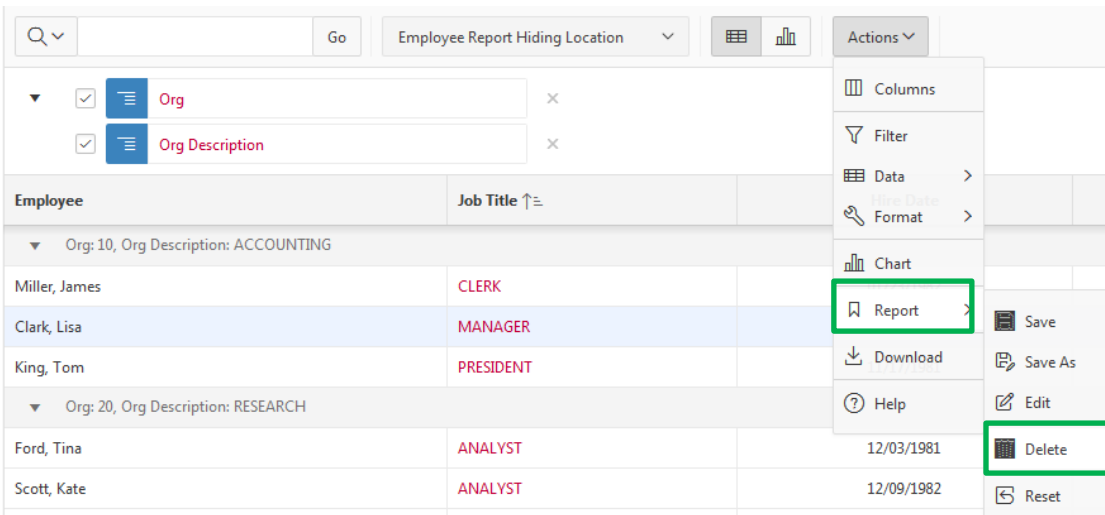
The drop-down reflects the change immediately.



The screenshot shows the top part of the interactive grid interface. The search bar is empty. The 'Go' button is visible. The dropdown menu now displays 'Employee Report Hiding Location' and is highlighted with a green box. To the right of the dropdown are icons for a grid and a bar chart. Further right is an 'Actions' dropdown menu, which is highlighted with a red box.

## Deleting a Private Report in an Interactive Grid

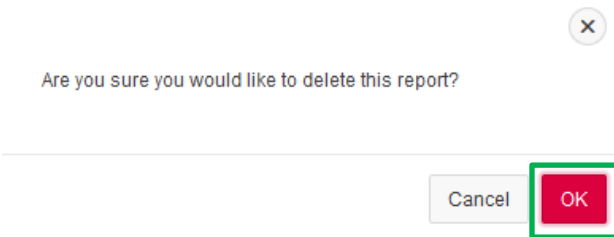
A Private report can be deleted by going to the Actions menu, Report, Delete.



The screenshot shows an interactive grid with a search bar, a 'Go' button, and a dropdown for 'Employee Report Hiding Location'. Below the search bar are two filter boxes: 'Org' and 'Org Description'. The grid has columns for 'Employee' and 'Job Title'. The data is grouped by organization: 'Org: 10, Org Description: ACCOUNTING' and 'Org: 20, Org Description: RESEARCH'. The 'Report' menu is open, showing options like 'Columns', 'Filter', 'Data', 'Format', 'Chart', 'Report', 'Download', 'Help', 'Save', 'Save As', 'Edit', 'Delete', and 'Reset'. The 'Report' and 'Delete' options are highlighted with green boxes.

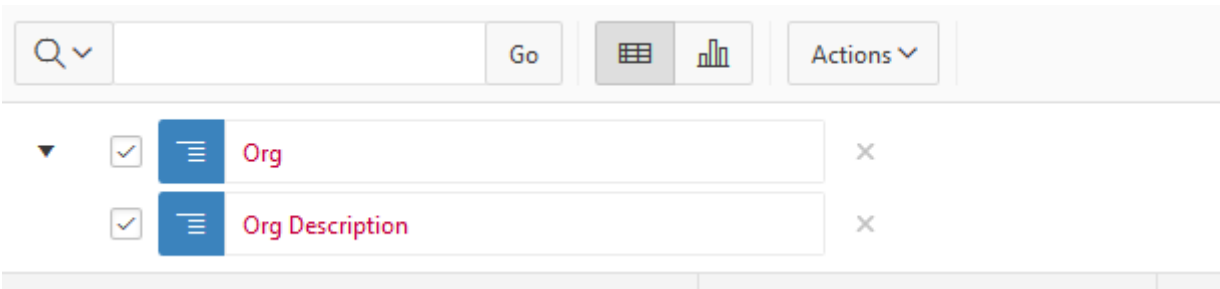
Employee	Job Title
Org: 10, Org Description: ACCOUNTING	
Miller, James	CLERK
Clark, Lisa	MANAGER
King, Tom	PRESIDENT
Org: 20, Org Description: RESEARCH	
Ford, Tina	ANALYST
Scott, Kate	ANALYST

A message confirms the delete. Click the **Ok** button to delete the **Private** report.



The screenshot shows a confirmation dialog box with a close button (X) in the top right corner. The text inside the dialog asks: 'Are you sure you would like to delete this report?'. At the bottom of the dialog are two buttons: 'Cancel' and 'OK'. The 'OK' button is highlighted with a green box.

The drop-down is no longer shown since only the Primary report exists.



The screenshot shows the top part of the interactive grid, including the search bar, 'Go' button, and 'Employee Report Hiding Location' dropdown. Below these are the 'Org' and 'Org Description' filter boxes. The 'Actions' menu is no longer visible, indicating that only the primary report exists.

## Resetting Interactive Grids

An interactive grid can be reset to undo any changes since it was last saved. Suppose the Location column was hidden.

Employee	Job Title ↑≡	Hire Date	Salary	Commission
▼ Org: 10, Org Description: ACCOUNTING				
Miller, James	CLERK	01/23/1982	\$1,300.00	-
Clark, Lisa	MANAGER	06/09/1981	\$2,450.00	-
King, Tom	PRESIDENT	11/17/1981	\$5,000.00	-
▼ Org: 20, Org Description: RESEARCH				
Ford, Tina	ANALYST	12/03/1981	\$3,000.00	-
Scott, Kate	ANALYST	12/09/1982	\$3,000.00	-

|< < 1 > >| 1 - 14 of 14

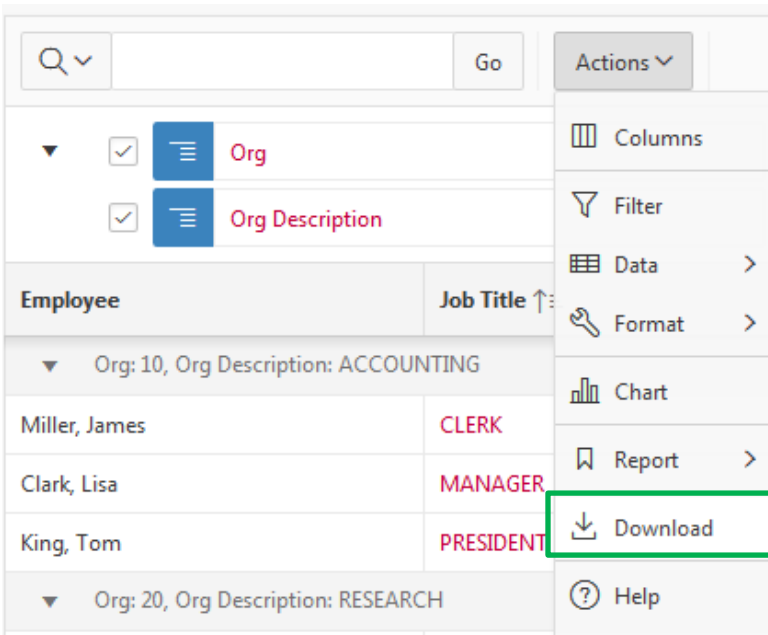
Since the report has not been saved without this column, click on the Reset button to bring the interactive grid back to the original state. The Location column is now visible.

Employee	Job Title ↑≡	Hire Date	Salary	Commission	Location
▼ Org: 10, Org Description: ACCOUNTING					
Miller, James	CLERK	01/23/1982	\$1,300.00	-	NEW YORK
Clark, Lisa	MANAGER	06/09/1981	\$2,450.00	-	NEW YORK
King, Tom	PRESIDENT	11/17/1981	\$5,000.00	-	NEW YORK
▼ Org: 20, Org Description: RESEARCH					
Ford, Tina	ANALYST	12/03/1981	\$3,000.00	-	DALLAS
Scott, Kate	ANALYST	12/09/1982	\$3,000.00	-	DALLAS

|< < 1 > >| 1 - 14 of 14

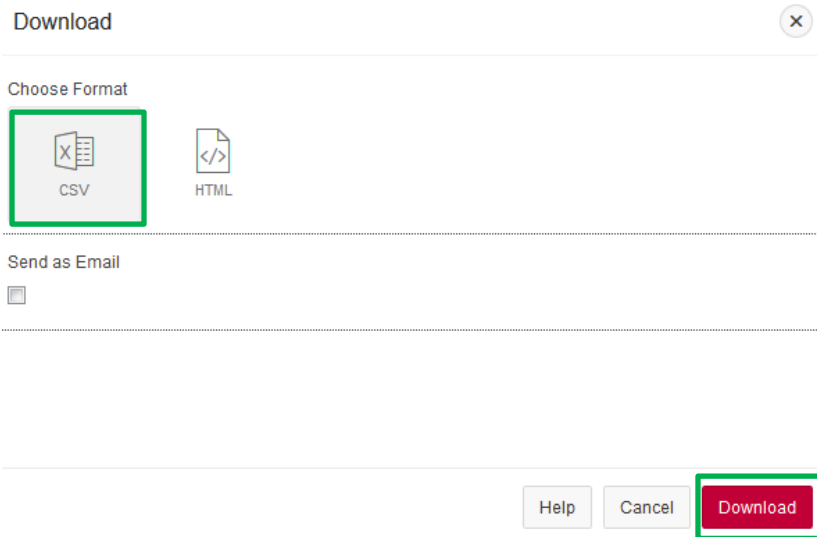
### Downloading an Interactive Grid

To download report data, click on the Actions menu and select **Download**.



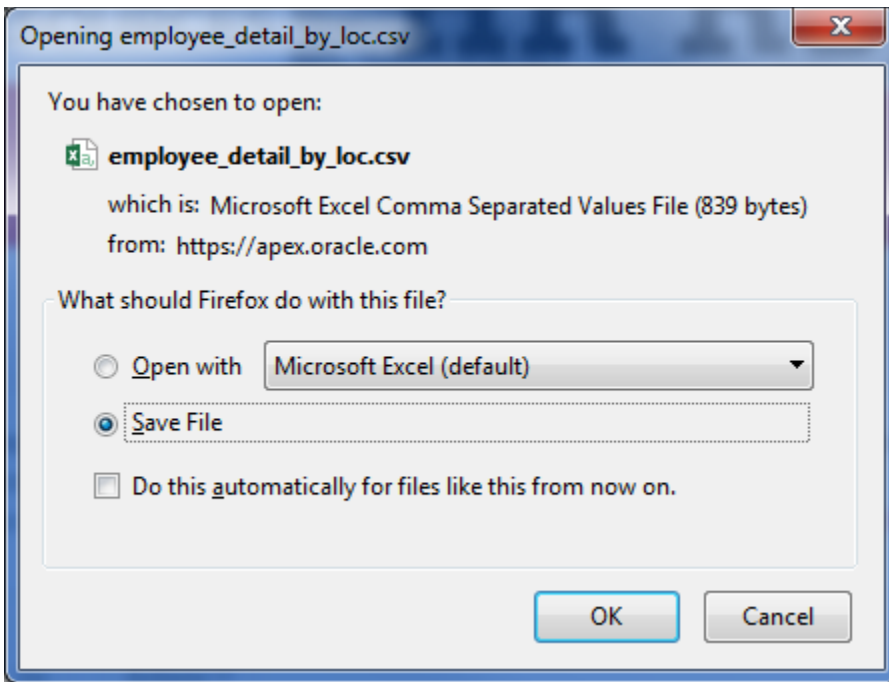
The screenshot shows a table with columns 'Employee' and 'Job Title'. The table contains three rows of data: Miller, James (CLERK), Clark, Lisa (MANAGER), and King, Tom (PRESIDENT). The table is filtered by 'Org: 10, Org Description: ACCOUNTING'. An 'Actions' menu is open over the table, showing options: Columns, Filter, Data, Format, Chart, Report, Download, and Help. The 'Download' option is highlighted with a green box.

Select **CSV** and click the **Download** button.

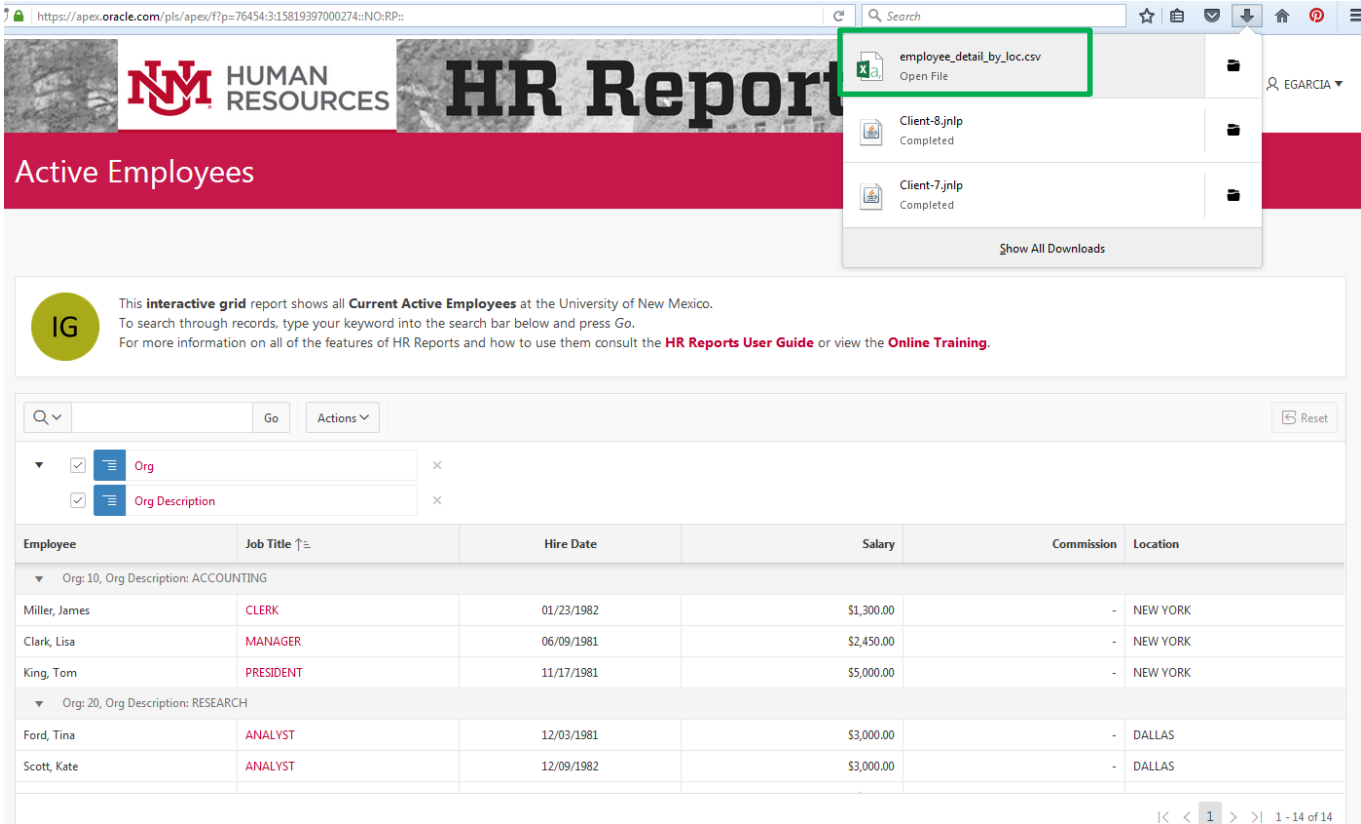


The screenshot shows a 'Download' dialog box. Under 'Choose Format', there are two options: 'CSV' (selected and highlighted with a green box) and 'HTML'. Below this, there is a 'Send as Email' checkbox which is unchecked. At the bottom of the dialog, there are three buttons: 'Help', 'Cancel', and 'Download' (highlighted with a green box).

Depending on your browser, you will be prompted to Save the file. Click OK.



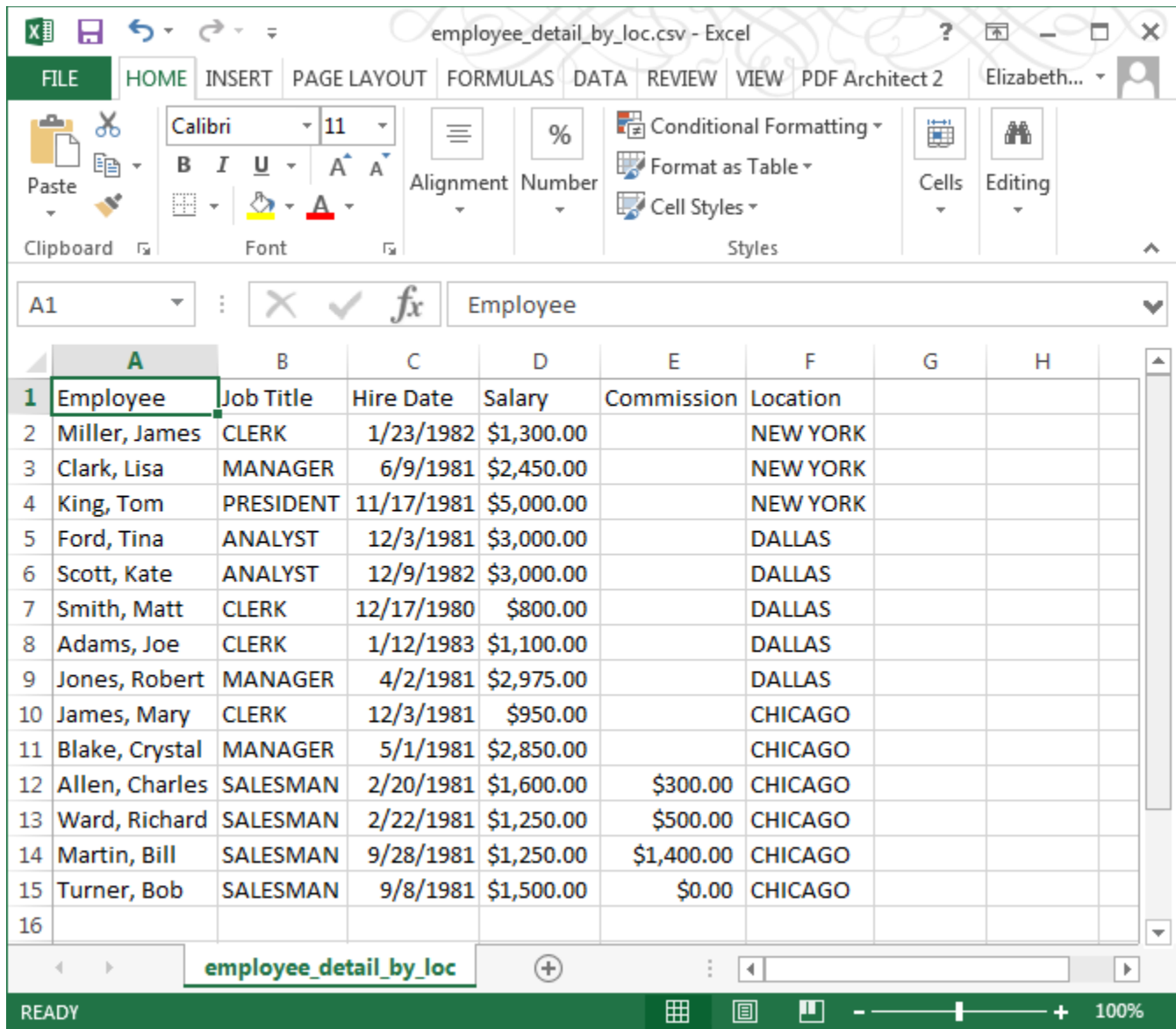
The browser shows the download arrow complete.



The screenshot shows a web browser window with the URL <https://apex.oracle.com/pls/apex/f?p=76454:3:15819397000274::NO:RP::>. The page header features the UNM HUMAN RESOURCES logo and the text 'HR Report' and 'Active Employees'. A download bar is open, showing the file 'employee\_detail\_by\_loc.csv' with a green box around it. Below the header, there is a search bar and filter options for 'Org' and 'Org Description'. The main content area displays a table of active employees.

Employee	Job Title ↑	Hire Date	Salary	Commission	Location
Org: 10, Org Description: ACCOUNTING					
Miller, James	CLERK	01/23/1982	\$1,300.00	-	NEW YORK
Clark, Lisa	MANAGER	06/09/1981	\$2,450.00	-	NEW YORK
King, Tom	PRESIDENT	11/17/1981	\$5,000.00	-	NEW YORK
Org: 20, Org Description: RESEARCH					
Ford, Tina	ANALYST	12/03/1981	\$3,000.00	-	DALLAS
Scott, Kate	ANALYST	12/09/1982	\$3,000.00	-	DALLAS

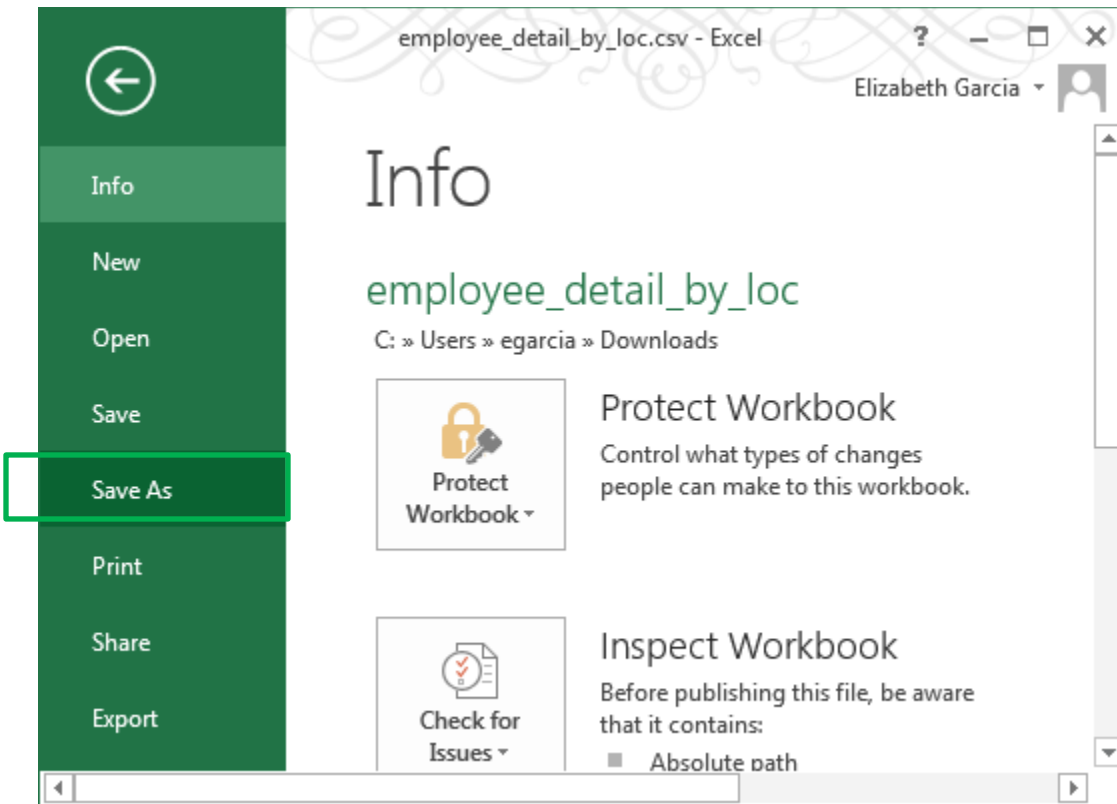
The data opens in Excel.



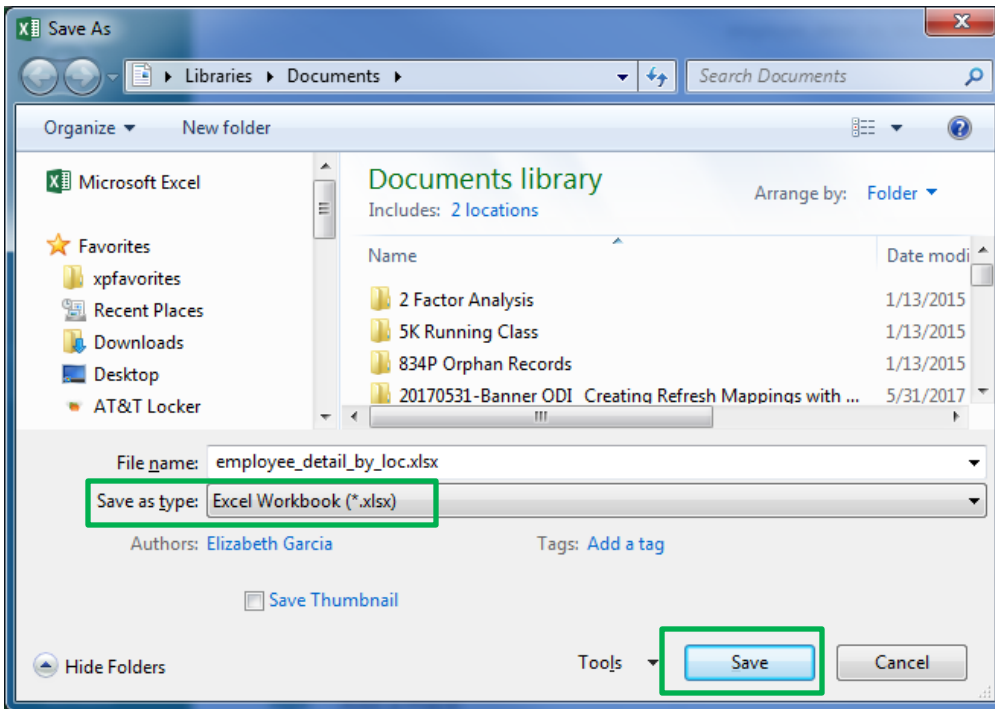
The screenshot shows the Microsoft Excel interface with the following data table:

Employee	Job Title	Hire Date	Salary	Commission	Location
Miller, James	CLERK	1/23/1982	\$1,300.00		NEW YORK
Clark, Lisa	MANAGER	6/9/1981	\$2,450.00		NEW YORK
King, Tom	PRESIDENT	11/17/1981	\$5,000.00		NEW YORK
Ford, Tina	ANALYST	12/3/1981	\$3,000.00		DALLAS
Scott, Kate	ANALYST	12/9/1982	\$3,000.00		DALLAS
Smith, Matt	CLERK	12/17/1980	\$800.00		DALLAS
Adams, Joe	CLERK	1/12/1983	\$1,100.00		DALLAS
Jones, Robert	MANAGER	4/2/1981	\$2,975.00		DALLAS
James, Mary	CLERK	12/3/1981	\$950.00		CHICAGO
Blake, Crystal	MANAGER	5/1/1981	\$2,850.00		CHICAGO
Allen, Charles	SALESMAN	2/20/1981	\$1,600.00	\$300.00	CHICAGO
Ward, Richard	SALESMAN	2/22/1981	\$1,250.00	\$500.00	CHICAGO
Martin, Bill	SALESMAN	9/28/1981	\$1,250.00	\$1,400.00	CHICAGO
Turner, Bob	SALESMAN	9/8/1981	\$1,500.00	\$0.00	CHICAGO

If you need the file in xlsx format instead of csv format, go to File, Save As.



Select **Excel Workbook (\*.xlsx)** in the Save as type and click the **Save** button.

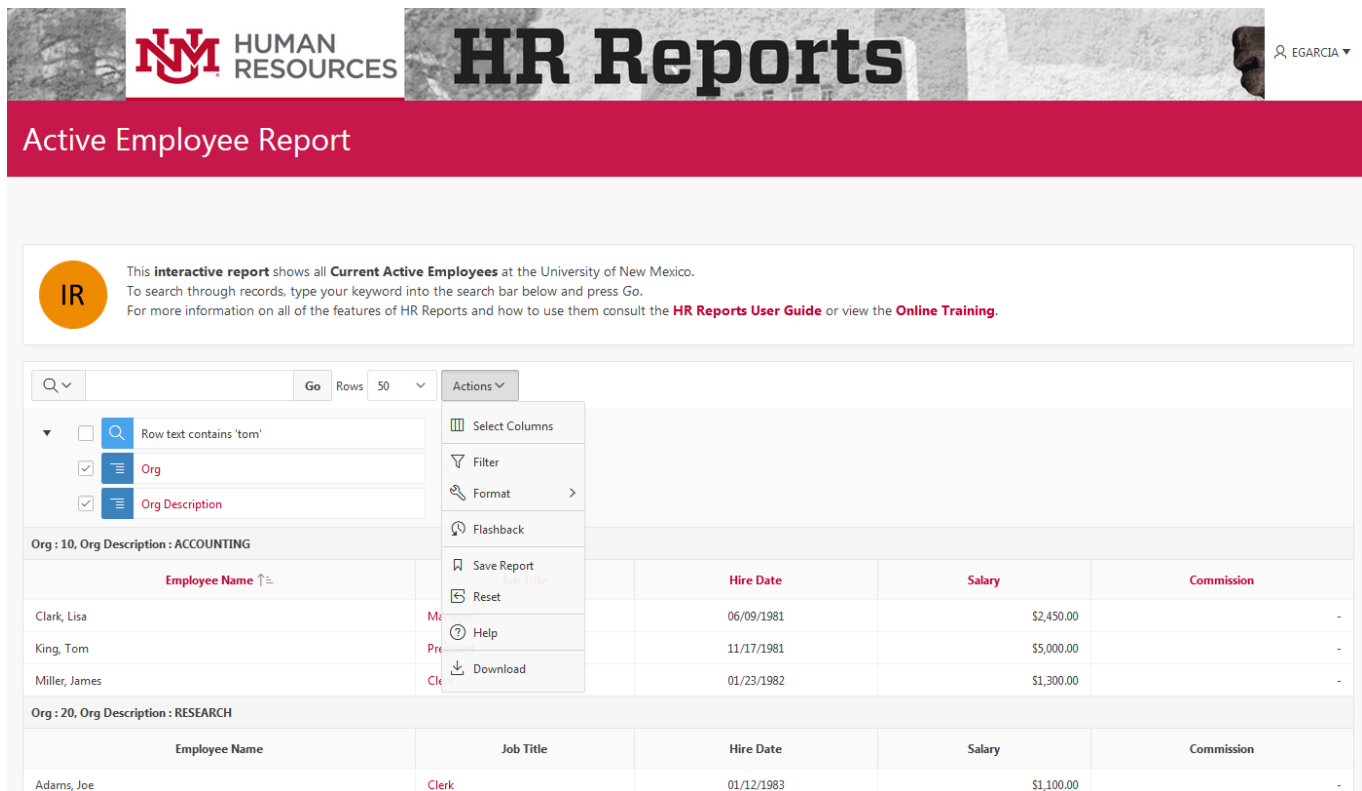




## Interactive Reports

Interactive reports enable users to create highly customized reports. Users can alter the report layout by hiding or exposing specific columns or exposing specific columns and applying filters, highlighting and sorting. They can define breaks, aggregations, charts, group data, and add their own computations. Once customized, the report can be saved as either a private or public report. Most interactive reports include a search bar, Actions menu, Column Heading menu.

The interactive report has almost the same functionality of the interactive grid. The main difference between the two report types is the drag and drop capabilities. Any customizations for an interactive report need to be done through the Actions menu. Also, the quick sorting by clicking on the column heading in interactive grids is not available in interactive reports. Keep in mind the IR icon that will distinguish between the two report types.



**Active Employee Report**

This **interactive report** shows all **Current Active Employees** at the University of New Mexico. To search through records, type your keyword into the search bar below and press Go. For more information on all of the features of HR Reports and how to use them consult the [HR Reports User Guide](#) or view the [Online Training](#).

Search:  Go Rows: 50 Actions

Filters:

- Row text contains 'tom'
- Org
- Org Description

Org : 10, Org Description : ACCOUNTING

Employee Name ↑	Hire Date	Salary	Commission
Clark, Lisa	06/09/1981	\$2,450.00	-
King, Tom	11/17/1981	\$5,000.00	-
Miller, James	01/23/1982	\$1,300.00	-

Org : 20, Org Description : RESEARCH

Employee Name	Job Title	Hire Date	Salary	Commission
Adams, Joe	Clerk	01/12/1983	\$1,100.00	-

Since the **Actions** menu has been discussed in detail with interactive grids, the Action menu capabilities will not be repeated for interactive reports.